

1ère mondiale : Plus de 1700 directeurs marketing interviewés en face à face

« IBM Global CMO Study 2011 » : Le Directeur Marketing au cœur de la performance de l'entreprise

Paris - 11 oct. 2011: IBM annonce aujourd'hui les résultats de l'étude « IBM Global CMO Study 2011 », la première étude mondiale dédiée aux directions marketing, menée par l'Institute for Business Value d'IBM. Plus de 1700 directeurs marketing, répartis dans 64 pays et 19 industries ont participé à cette étude via des entretiens en face à face. **111 directeurs marketing ont été interviewés en France.**

L'étude vient compléter la série des enquêtes IBM consacrées aux défis économiques de notre époque, et réalisées sur la base d'entretiens avec des décideurs du monde entier (CEO, CIO, CFO...) totalisant plus de 15 000 interviews.

L'étude s'inscrit dans un contexte économique incertain et dans un monde où l'influence et l'émergence des médias sociaux impactent de plus en plus le rôle du directeur marketing au sein de l'entreprise. L'étude révèle en effet que les directeurs marketing sont conscients des défis auxquels ils sont confrontés et reconnaissent également évoluer dans un monde plus complexe et plus incertain. En France, 85% des directeurs marketing prévoient un niveau de complexité élevé à très élevé dans les 5 ans à venir, et 25% ne se sentent pas prêts à y faire face. Ainsi, ils estiment être confrontés à quatre grands challenges pour lesquels ils se sentent le moins préparés et qui risquent pourtant d'impacter le plus l'exercice de leur fonction dans les 5 années à venir.

- L'explosion des données : La prolifération et la multiplicité des données disponibles issues des nouvelles sources digitales qui s'ajoutent aux données traditionnelles issues du marché et des ventes représentent le challenge numéro un pour les directions marketing. En France, **81%** des répondants estiment manquer de préparation face l'explosion des données et près des **3/4** soulignent la nécessité d'investir dans la technologie et de mettre en place des stratégies pour exploiter au mieux l'énorme volume de données disponible.
- un choix élargi des canaux et de périphériques : Le nombre croissant de nouveaux canaux marketing est rapidement devenu une priorité pour les directions marketing. Ils ont désigné le choix élargi des canaux et des périphériques (mobile, tablette etc..) comme étant le deuxième facteur auquel ils sont le moins préparés, à hauteur de **78%** en France, et 62% dans le monde.
- Les médias sociaux : Les directions marketing utilisent les plateformes sociales pour communiquer mais éprouvent des difficultés à analyser les données non structurées qui permettraient de mieux connaître le client. En effet, **72%** des répondants en France reconnaissent manquer de préparation face à l'émergence et à la nouvelle influence des médias sociaux. (Ils sont 68% dans le monde)
- L'évolution démographique : La globalisation et l'arrivée des jeunes générations bouleversent l'accès à l'information et les habitudes de consommation.

"Cette étude révèle que le directeur marketing est à l'aube d'une profonde transformation de son rôle, plus encore d'un renforcement de sa position au cœur de la performance de l'entreprise. Le volume des données à

sa disposition, la multiplicité des canaux de commercialisation et d'influence, les innovations technologiques et la démographie transforment son métier et renforcent son impact direct sur la croissance et le succès de l'entreprise », affirme Didier Barbé, Vice-Président Marketing et Communication, IBM France. « La décennie qui s'ouvre sera celle du directeur marketing évalué sur la rentabilité démontrée de ses actions »

Pour faire face à ce niveau de complexité sans précédent, l'étude révèle notamment trois enseignements pour les directeurs marketing :

- **Apporter de la valeur au consomm'acteur**

Les directeurs marketing voient la nécessité de recentrer le marketing sur l'individu en explorant de nouveaux canaux numériques tout en protégeant l'information.

En France, les directeurs marketing s'appuient encore sur les sources d'informations classiques telles que les études de marché et l'analyse comparative de la concurrence pour prendre leurs décisions stratégiques mais peu d'entre eux exploitent les informations qui circulent sur les canaux numériques. Seulement **30%** d'entre eux utilisent par exemple les blogs comme source d'information dans la prise de décisions.

- **Favoriser l'intimité client dans la durée**

Les responsables marketing reconnaissent le changement critique qui s'opère dans la manière dont ils conversent avec les consommateurs. Ils estiment que dynamiser les relations et interagir de manière continue avec le consomm'acteur tout en développant la lisibilité de la marque et de ses valeurs permettrait de favoriser l'intimité client dans la durée. Néanmoins, l'étude révèle que la majorité des directeurs marketing utilise encore les informations liées aux transactions plutôt que celles liées à l'expérience client.

- **Mesurer sa performance et étendre son influence**

L'étude montre également que les outils de mesure utilisés pour évaluer l'efficacité des actions marketing sont en train d'évoluer. **62 %** des directeurs marketing en France estiment que le retour sur investissement des dépenses marketing sera le critère de succès numéro un d'ici 2015.

IBM STUDY: DIGITAL ERA TRANSFORMING CMO'S AGENDA, REVEALING GAP IN READINESS

Most chief marketers admit they are not sufficiently plugged into real-time conversations about their brands

CMOs struggling to prove the return on marketing investments

ARMONK, N.Y. - 11 October 2011: A new IBM (NYSE: IBM) study of more than 1,700 chief marketing officers from 64 countries and 19 industries reveals that the majority of the world's top marketing executives recognize a critical and permanent shift occurring in the way they engage with their customers, but question whether their marketing organizations are prepared to manage the change.

At the same time, the research shows that the measures used to evaluate marketing are changing. Nearly two-thirds of CMOs think return on marketing investment will be the primary measure of the marketing function's effectiveness by 2015. But even among the most successful enterprises, half of all CMOs feel insufficiently prepared to provide hard numbers.

And most of these executives – responsible for the integrated marketing of their organization's products, services and brand reputations – say they lack significant influence in key areas such as product development, pricing and selection of sales channels.

The IBM study found that while 82 percent of CMOs say they plan to increase their use of social media over the next three to five years, only 26 percent are currently tracking blogs, 42 percent are tracking third party reviews and 48 percent are tracking consumer reviews to help shape their marketing strategies.

"The inflection point created by social media represents a permanent change in the nature of customer relationships," said Carolyn Heller Baird, CRM research lead for the IBM Institute for Business Value and the global director of the study. "Approximately 90 percent of all the real-time information being created today is unstructured data. CMOs who successfully harness this new source of insight will be in a strong position to increase revenues, reinvent their customer relationships and build new brand value."

Customers are sharing their experiences widely online, giving them more control and influence over brands. This shift in the balance of power from organizations to their customers requires new marketing approaches, tools and skills in order to stay competitive. CMOs are aware of this changing landscape, but are struggling to respond. More than 50 percent of CMOs think they are underprepared to manage key market forces – from social media to greater customer collaboration and influence – indicating that they will have to make fundamental changes to traditional methods of brand and product marketing.

Baird likened marketers who underestimate the impact of social media to those who were slow to view the Internet as a new and powerful platform for commerce. Like the rise of e-business more than a decade ago, the radical embrace of social media by all customer demographic categories represents an opportunity for marketers to drive increased revenue, brand value and to reinvent the nature of the relationship between enterprises and the buyers of their offerings. Marketers who establish a culture receptive to deriving insight from social media will be far better prepared to anticipate future shifts in markets and technology.

While they identify customer intimacy as a top priority, and recognize the impact of real-time data supplementing traditional methods of channel marketing and gathering market feedback, most CMOs say they remain mired in 20th century approaches. Eighty-percent or more of the CMOs surveyed are still focusing primarily on traditional sources of information such as market research and competitive benchmarking, and 68 percent rely on sales campaign analysis to make strategic decisions.

Managing the Four Challenges

Collectively, the study findings point to four key challenges that CMOs everywhere are confronting: the explosion of data, social media, channel and device choices and shifting demographics will be pervasive, universal game changers for their marketing organizations over the next three to five years. But a large majority of CMOs feel unprepared to manage their impact.

Data explosion: Every day we create 2.5 quintillion bytes of data – so much that 90 percent of the world’s data today has been created in the last two years alone. The increasing volume, variety and velocity of data available from new digital sources like social networks, in addition to traditional sources such as sales data and market research, tops the list of CMO challenges. The difficulty is how to analyze these vast quantities of data to extract the meaningful insights, and use them effectively to improve products, services and the customer experience.

Social platforms: Social media enables anyone to become a publisher, broadcaster and critic. Facebook has more than 750 million active users, with the average user posting 90 pieces of content a month. Twitter users send about 140 million tweets a day. And YouTube’s 490 million users upload more video content in a 60-day period than the three major U.S. television networks created in 60 years. Marketers are using social platforms to communicate – with 56 percent of CMOs viewing social media as a key engagement channel – but they still struggle with capturing valuable customer insight from the unstructured data that customers and potential customers produce.

Channel and device choices: The growing number of new marketing channels and devices, from smart phones to tablets, is quickly becoming a priority for CMOs. Mobile commerce is expected to reach \$31 billion by 2016, representing a compound annual growth rate of 39 percent from 2011 to 2016. Meanwhile, the tablet market is expected to reach nearly 70 million units worldwide by the end of this year, growing to 294 million units by 2015.

Shifting demographics: New global markets and the influx of younger generations with different patterns of information access and consumption are changing the face of the marketplace. In India, as one example, the middle class is expected to soar from roughly 5 percent of the population to more than 40 percent in the next two decades. Marketers who have historically focused on affluent Indian consumers must adapt their strategies to market to this emerging middle class. In the United States, marketing executives must respond to the aging baby boomer generation and growing Hispanic population.

Lack of Influence

Today’s CMOs have to cover more ground than ever before. They have to manage more data from disparate sources, understand and engage with more empowered customers, adopt and adapt to more sophisticated tools and technologies – while being more financially accountable to their organizations.

In fact, 63 percent of CMOs believe return on investment (ROI) on marketing spend will be the most important measure of their success by 2015. However, only 44 percent feel fully prepared to be held accountable for marketing ROI.

Most CMOs have not traditionally been expected to provide hard financial evidence of their ROI. But given the current economic volatility and pressure to be profitable, organizations can no longer afford to write a blank check for their marketing initiatives. CMOs recognize they now need to quantify the value they bring to the business, be it from investing in advertising, new technologies or any other activity.

This increasing emphasis on ROI also reflects the scrutiny the marketing function is currently attracting, itself a reflection of the function's growing prominence. Today's CMOs are in much the same position as chief financial officers (CFOs) were a decade ago, when the CFO's role was evolving from guardian of the purse strings to strategic business adviser.

If CMOs are to be held responsible for the marketing returns they deliver, they must also have significant influence over all "Four Ps": promotion, products, place and price. The study found that this is often not the case.

CMOs say they exert a strong influence over promotional activities such as advertising, external communications and social media initiatives. But, in general, they play a smaller role in shaping the other three Ps. Less than half of the CMOs surveyed have much sway over key parts of the pricing process, and less than half have much impact on new product development or channel selection.

To meet these new challenges, CMOs must boost their own digital, technological and financial proficiency – but many seem surprisingly reticent in this respect. When asked which attributes they will need to be personally successful over the next three to five years, only 28 percent said technological competence, 25 percent said social media expertise and 16 percent said financial acumen.

About the Global CMO Study

The 2011 IBM Global Chief Marketing Officer Study is IBM's first study of CMOs — and the fifteenth in the ongoing series of C-suite Studies developed by the IBM Institute for Business Value. Between February and June 2011, IBM met face to face with 1,734 CMOs in 19 industries and 64 countries to better understand their goals and the challenges they confront. The respondents came from a wide variety of organizations, ranging from 48 of the top 100 brands listed in the 2010 Interbrand rankings to enterprises with a primarily local profile.

For access to the full 2011 IBM Global CMO Study, visit <http://ibm.com/cmstudy>.

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