

A man in a dark suit and glasses is sitting in a lecture hall, looking thoughtful with his hand on his chin. He is using a laptop. The background shows rows of empty chairs.

DIGITAL DISTRESS:

What Keeps Marketers Up at Night?

Methodology

- Online survey among a total of 1,000 US marketers.
- Data collected between August 26 and September 11, 2013 by ResearchNow.
- Margin of error at the 95% confidence level for the total sample is +/- 3.1%.
- Data was also broken out by the following sub-groups:
 - Marketing Staff (n=499) vs. Marketing Decision Makers (n=436)
 - Digital Marketers (n=263) vs. Marketing Generalists (n=754)

For the purposes of this study, we divided marketers into four categories:

All data self-reported by respondents.

Staff

vs.

**Decision
Makers**

lower-level, execution
employees

higher-level employees

&

**Digital
Marketers**

vs.

**Marketing
Generalists**

primarily digital-
focused

mostly traditional,
some digital



WHAT WE LEARNED

1 The marketing profession has **changed dramatically**

- Seventy-six percent of marketers think marketing has changed more in the past two years than the past 50. *(slide 10)*

2 Marketers express doubt about their **skills, effectiveness and ability to measure impact**

- Marketers are not confident in their digital ability. Only 48% of digital marketers feel highly proficient in digital marketing. *(slide 14)*
- Marketers have low confidence in their companies' marketing performance. Only 40% think their company's marketing is effective. *(slide 9)*
- Sixty-eight percent of marketing professionals feel more pressured to show return on investment on marketing spend. *(slide 22)*
- Most digital marketers don't have formal training; 82% learn on the job. *(slide 27)*
- Only 9% of respondents strongly agree with the statement "I know our digital marketing is working." *(slide 23)*

3

Strong business performance is highly correlated with **digital marketing proficiency**

- High-performing companies are twice as likely to rate their company as highly proficient in digital marketing (50%) than lower performing companies (25%). *(slide 45)*
- There is a significant gap (47%) between perceived importance and actual performance when it comes to marketing measurement. Seventy-six percent of marketers believe measurement is important vs. 29% who believe they are doing it well. *(slide 34)*

4

Marketers are most concerned about...

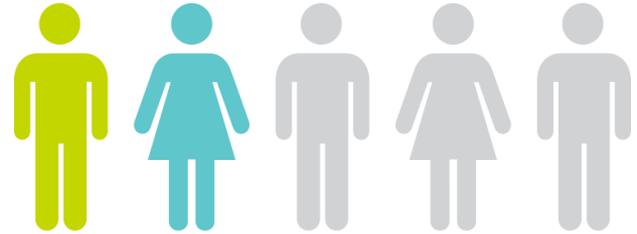
- The issues of the greatest concern for marketers are: reaching their customers (82%), understanding whether their campaigns are working (79%), followed closely by proving campaign effectiveness (77%) and demonstrating marketing return on investment (75%). *(slide 49)*
- Sixty-six percent of all marketers think companies won't succeed unless they have a digital marketing approach. *(slide 51)*

A close-up photograph of a person's hands in a white business shirt interacting with a tablet computer. The tablet displays a bar chart. The scene is set on a dark wooden desk with a white coffee cup filled with black coffee on a saucer to the left, and several documents and a pen scattered in the background.

1. THE CHANGING MARKETING LANDSCAPE

Marketers do not think they significantly influence business strategy.

Only **44%** say their marketing departments have a great deal of influence over their organization's overall business strategy



Q5. How much does your marketing department influence your organization's overall business strategy? Base: TOTAL (n=1017)

They have low confidence in their companies' marketing performance.

Only **40%** think their company's marketing is effective.

Q4. On a 0 to 10 scale where 0 is NOT AT ALL EFFECTIVE and 10 is EXTREMELY EFFECTIVE how effective is your company overall in terms of marketing? TOP 3 BOX
Base: TOTAL (n=1017)



Most marketers agree:

1 Marketing has value and that value can be measured

AGREEMENT:

ALL MARKETERS: 81%
MARKETING STAFF: 83%
DECISION MAKERS: 78%
DIGITAL MARKETERS: 81%
MARKETING GENERALISTS: 81%

2 Marketing has changed more in the last 2 years than in the last 50

AGREEMENT:

ALL MARKETERS: 76%
MARKETING STAFF: 77%
DECISION MAKERS: 76%
DIGITAL MARKETERS: 77%
MARKETING GENERALISTS: 76%

3 For most companies, digital marketing approaches are in a constant cycle of trial and error

AGREEMENT:

ALL MARKETERS: 61%
MARKETING STAFF: 61%
DECISION MAKERS: 62%
DIGITAL MARKETERS: 60%
MARKETING GENERALISTS: 61%

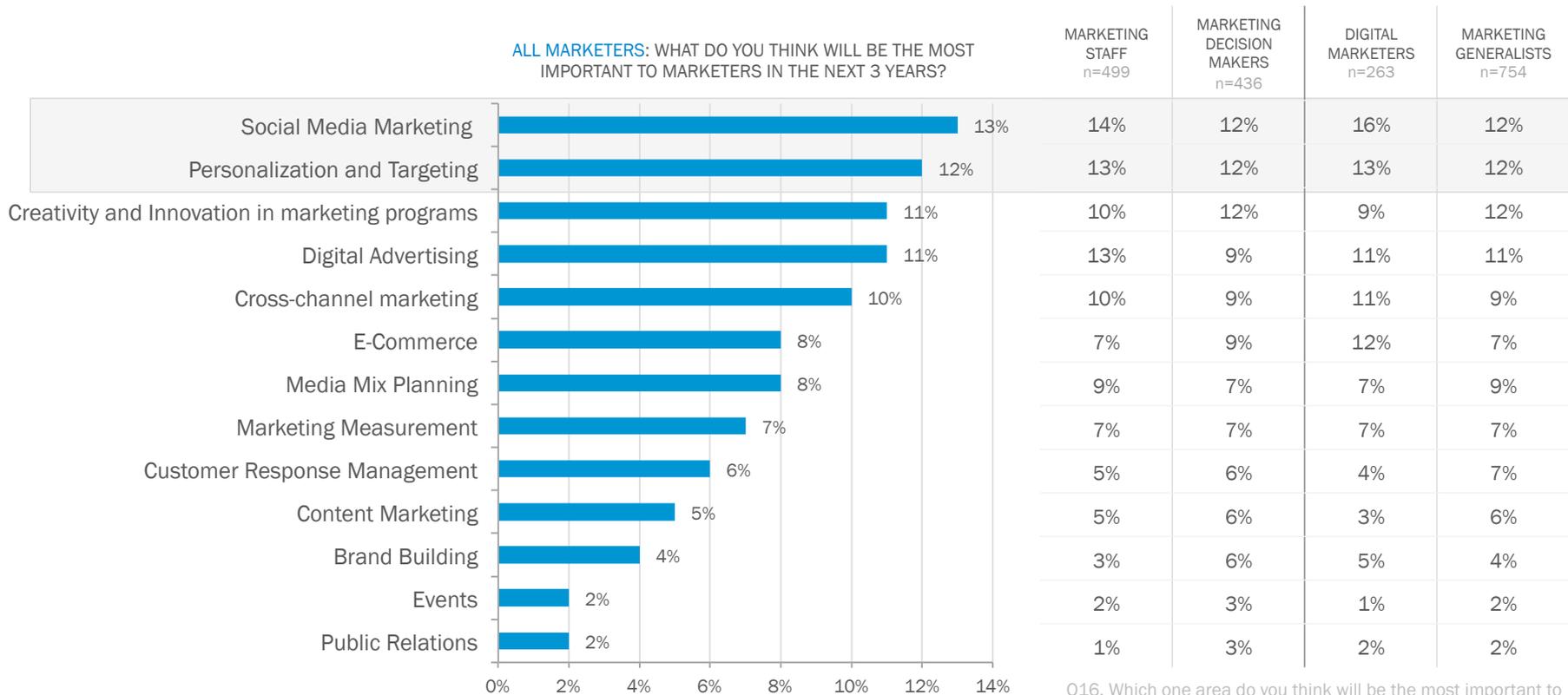
Q10. Please indicate whether you agree or disagree with the following statements: TOP 2 BOX Base: TOTAL (n=1017) MARKETING STAFF (n=499) MKTING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)



A close-up photograph of a person's hands interacting with a tablet computer. The person is wearing a light blue, long-sleeved button-down shirt. The tablet is held in their left hand, and their right index finger is touching the screen, which displays a bar chart. The scene is set on a dark wooden desk. To the left of the tablet is a white ceramic coffee cup filled with dark coffee, sitting on a matching white saucer. Behind the tablet and to the right is a white sheet of paper with printed text, and a silver and black pen lies on it. The lighting is soft and focused on the hands and the tablet.

2. MARKETERS' CONCERNS

Marketers do not have a clear consensus on what areas to focus on in the future



Q16. Which one area do you think will be the most important to marketers in the next 3 years? (Select ONE only)
Base: TOTAL (n=1017)



60% of marketers
expect their companies
will invest more in digital
marketing technology
this year.

That investment is not being
matched with marketer
confidence.

Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. Base: TOTAL (n=1017)



Less than half of digital marketers feel highly proficient in digital marketing.

Generalists are even less confident.

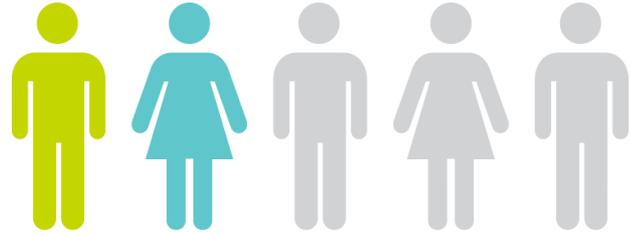
- **48%** of digital marketers feel highly proficient *(TOP 2 BOX)*
- **37%** of marketing generalists feel highly proficient *(TOP 2 BOX)*

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)



**Just one in three marketers
think their companies are highly
proficient in digital marketing.**

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: ALL MARKETERS (n=1,017)



Only two out of five marketers think their colleagues and peers are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: ALL MARKETERS (n=1,017)

Marketers skeptical of team proficiency

Of all marketers...

- **39%** say that they are highly proficient in digital marketing.
- **40%** say that their marketing colleagues/team are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)

SELF	
MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436
40%	40%
DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
48%	37%
MARKETING COLLEAGUES/TEAM	
MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436
43%	35%
DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
45%	39%

Confidence in companies even lower

Of all marketers...

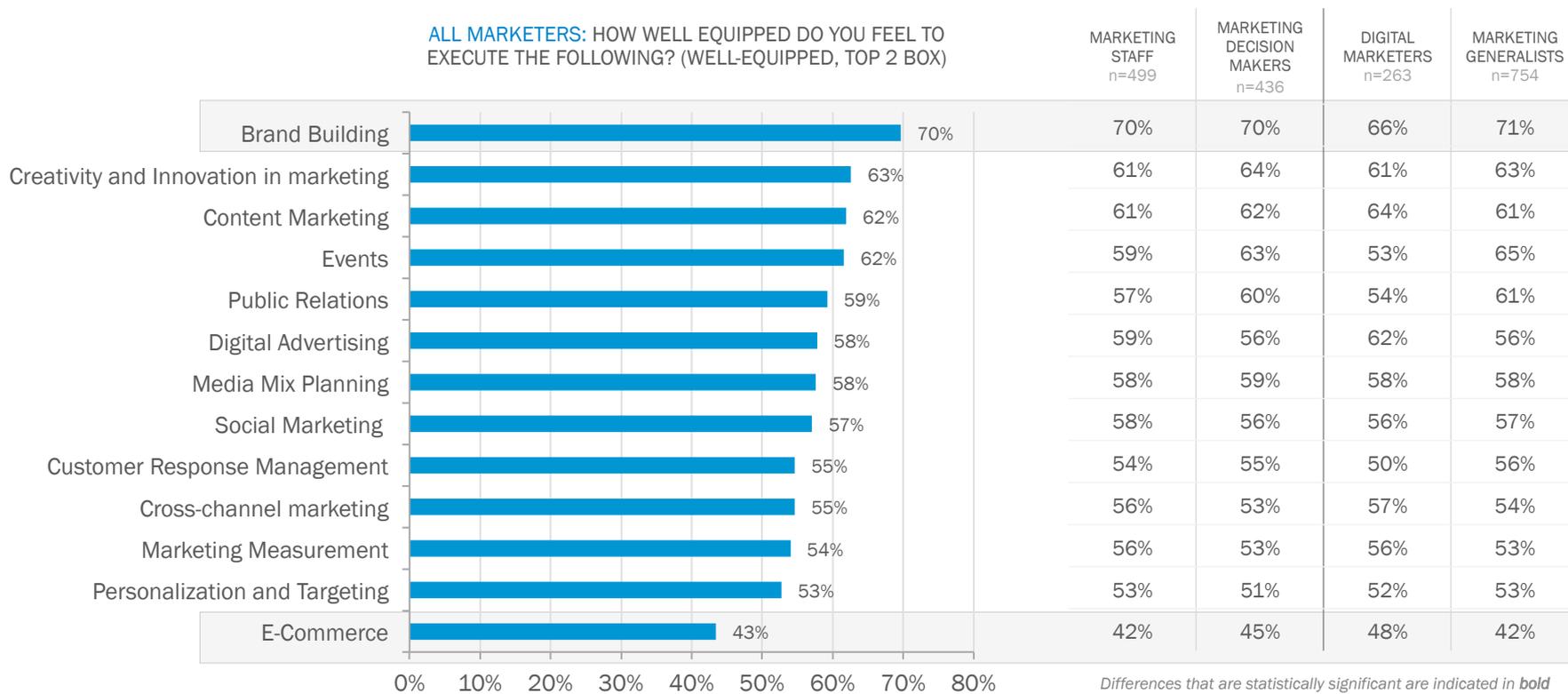
- **34%** say that their company is highly proficient in digital marketing.
- **40%** say that their industry peers are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: TOTAL (n=1017)

COMPANY	
MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436
35%	31%
DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
38%	33%
INDUSTRY PEERS	
MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436
47%	41%
DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
48%	44%

Low confidence in e-commerce, targeting and measurement

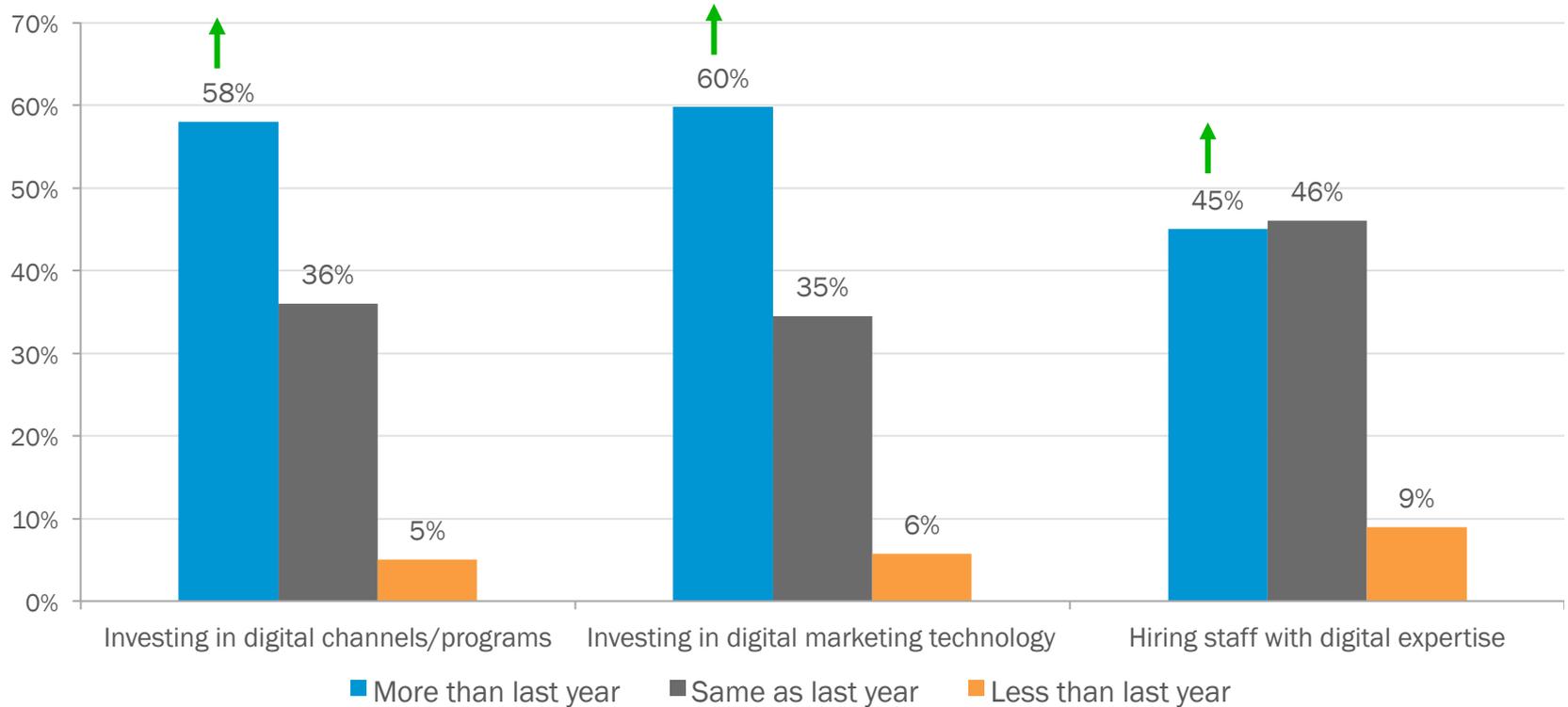
ALL MARKETERS: HOW WELL EQUIPPED DO YOU FEEL TO EXECUTE THE FOLLOWING? (WELL-EQUIPPED, TOP 2 BOX)



Differences that are statistically significant are indicated in **bold**

Q14. How well equipped do you feel to execute the following?
TOP 2 BOX Base: TOTAL (n=1017)

Digital capital investment expected to increase



Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. Base: TOTAL (n=1017)

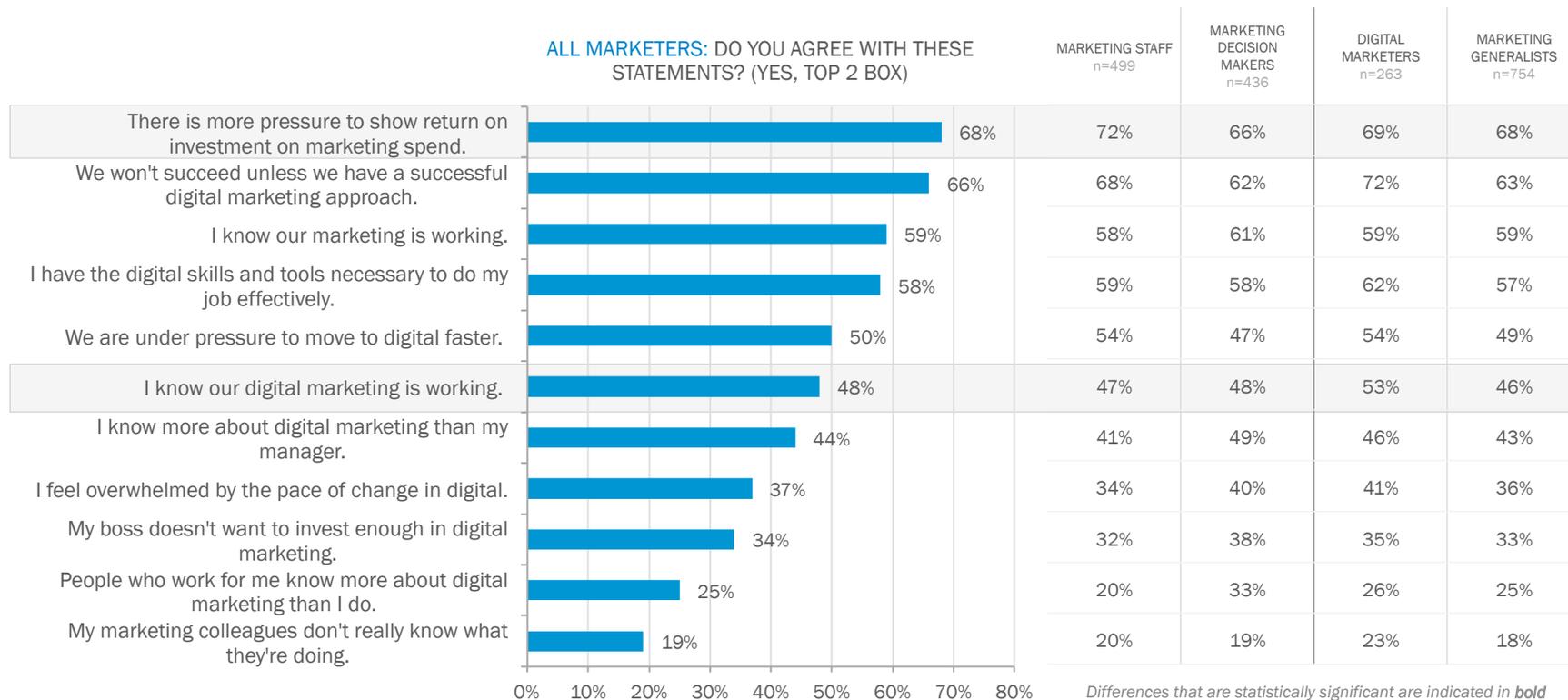


Ultimately, **61%**
of all marketers
think that, for
most companies,
digital marketing
approaches are a
constant cycle of
trial and error.

Q10. Please indicate whether you agree or disagree with
the following statements: TOP & BOTTOM 2 BOX
Base: TOTAL (n=1017)

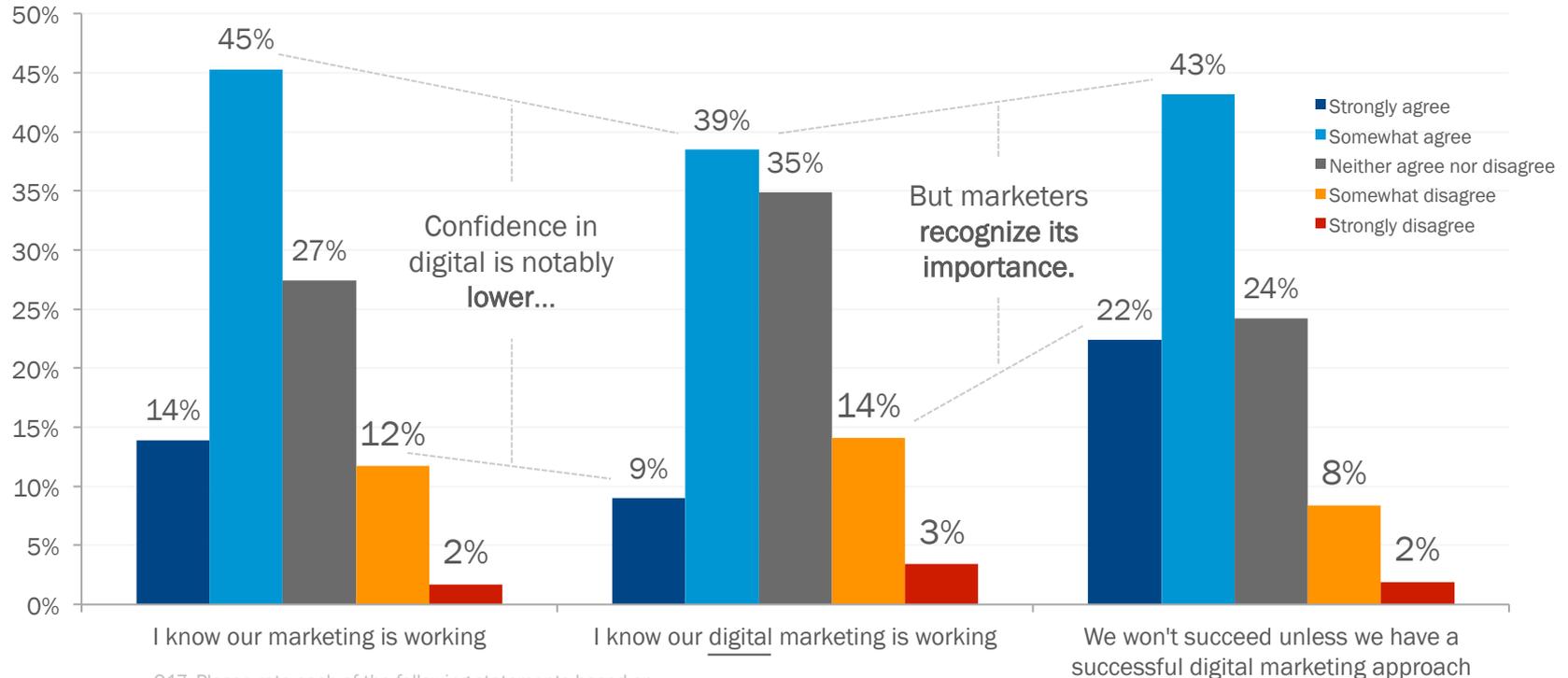
Marketers feeling pressure of ROI emphasis

ALL MARKETERS: DO YOU AGREE WITH THESE STATEMENTS? (YES, TOP 2 BOX)



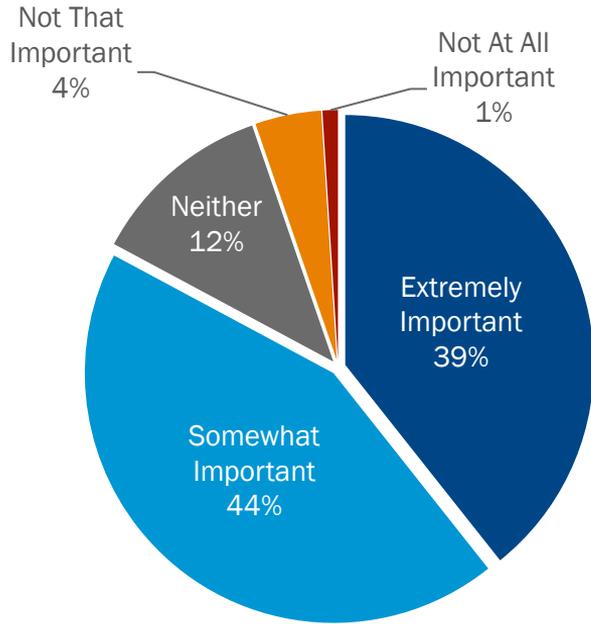
Q17. Please rate each of the following statements based on whether you agree or disagree: TOP 2 BOX Base: TOTAL (1017)

While almost half of respondents claim to know their digital marketing is working, only 9% strongly agree

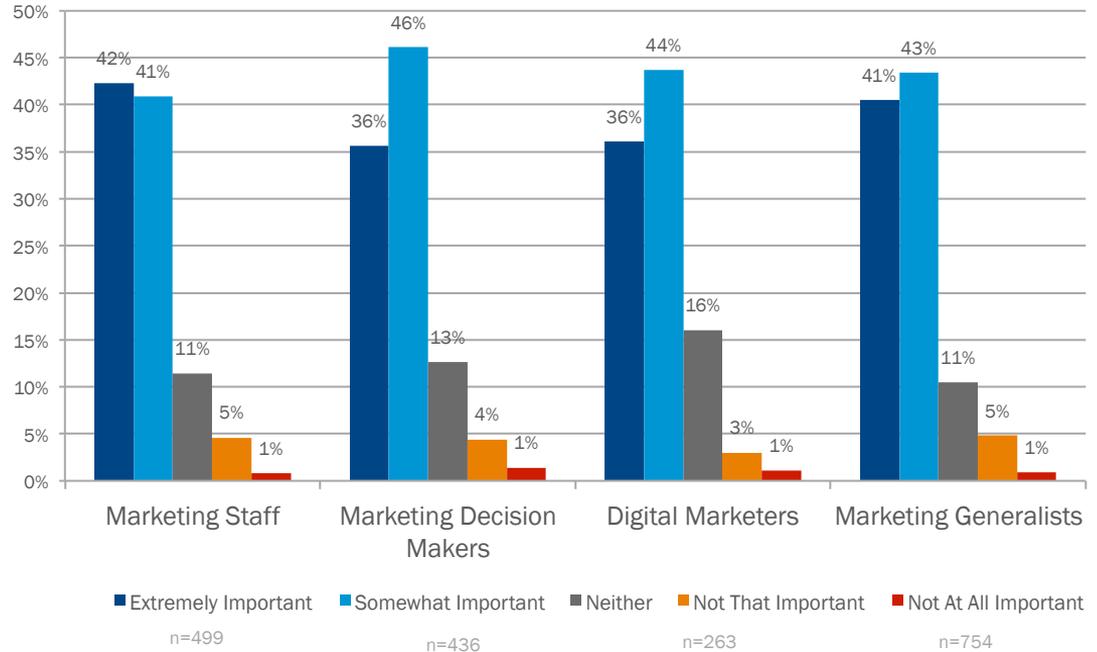


Q17. Please rate each of the following statements based on whether you agree or disagree: Base: TOTAL (1017)

Marketers overwhelmingly place importance on ROI

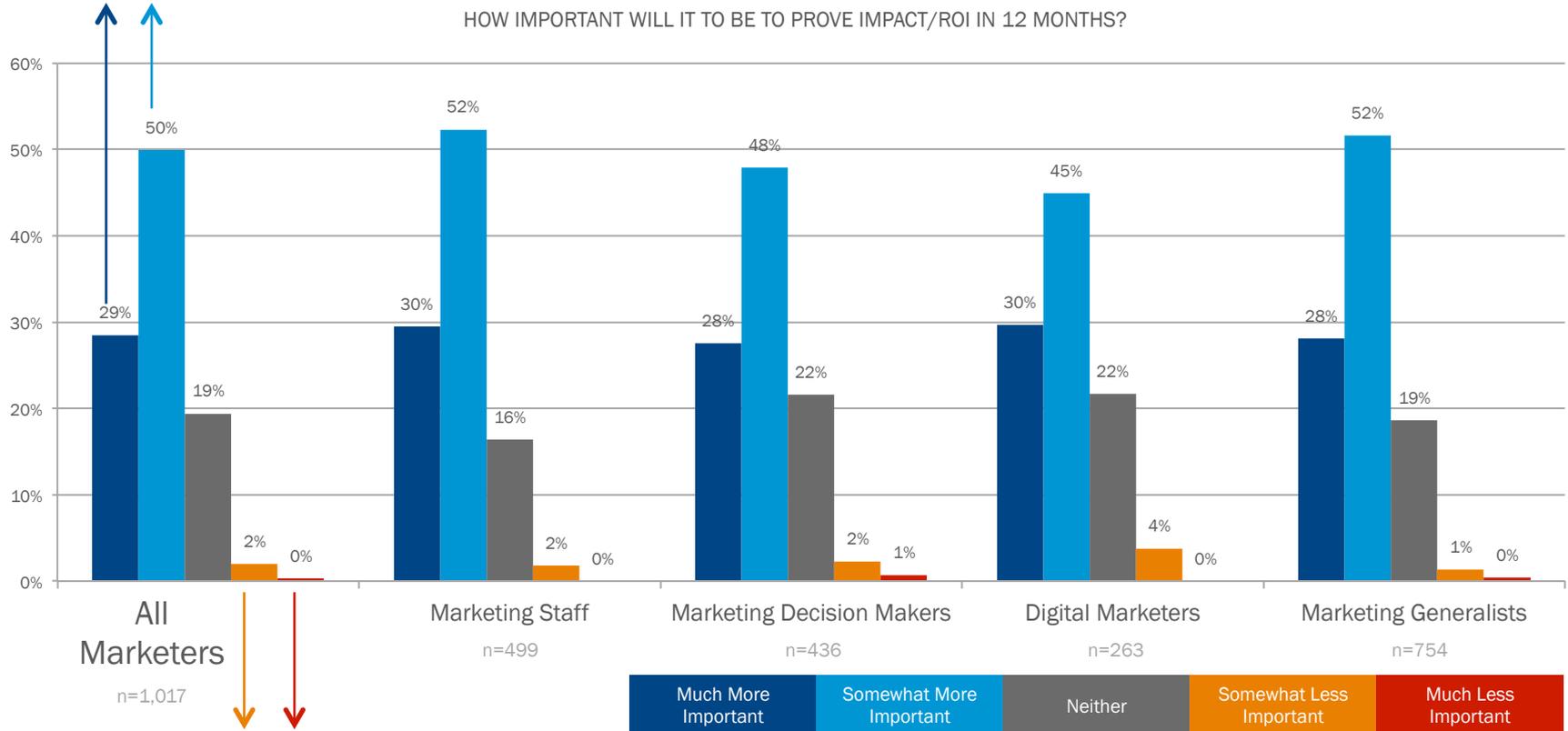


ALL MARKETERS: HOW IMPORTANT IS IT TO PROVE BUSINESS IMPACT AND/OR ROI?

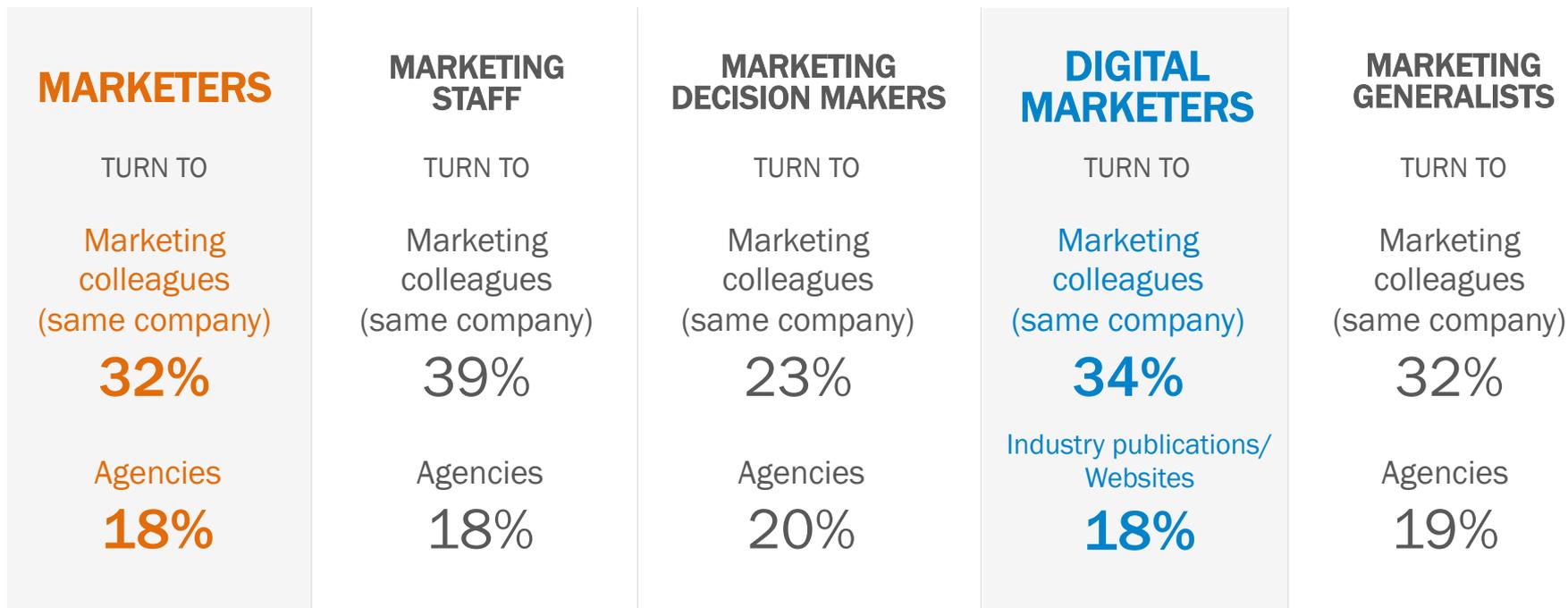


Q20. How important is it to your management for your marketing function/team to prove business impact and/or return on its financial investment (ROI)? Base:TOTAL (n=1017)

And expect it to be more important in the next year



Marketers, regardless of focus or stature, turn first to their marketing colleagues for digital marketing advice.

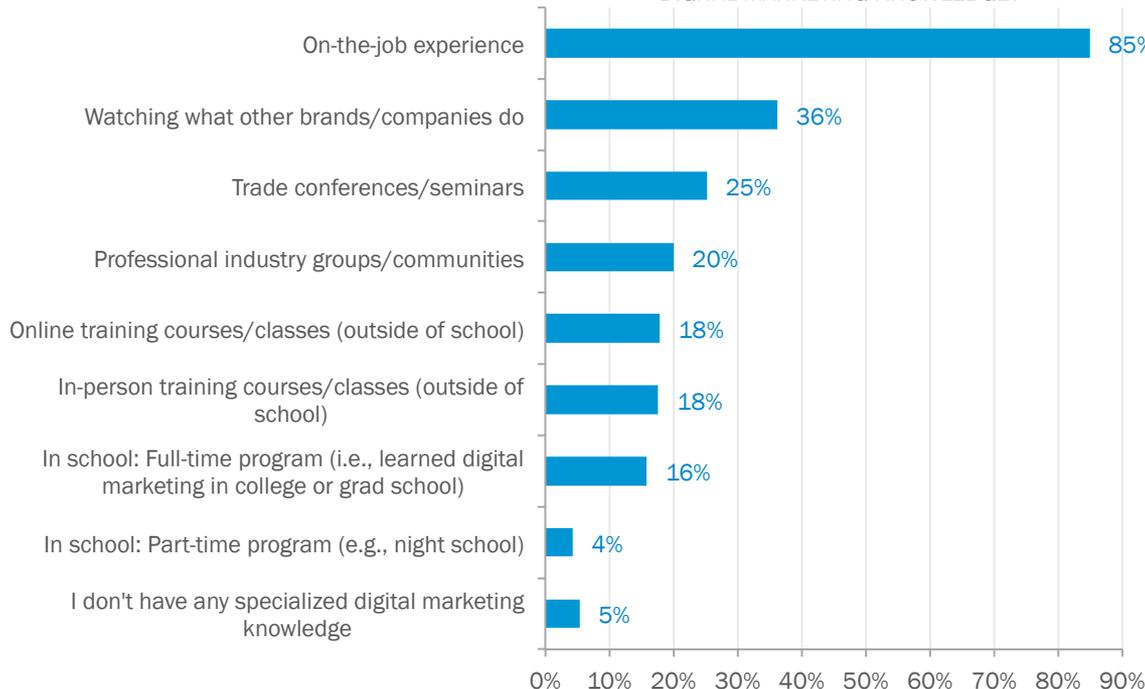


Q19. Who do you turn to first for digital marketing advice? TOP 2 BOX Base: TOTAL (n=1017)
MARKETING STAFF (n=499) MKTING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)

Most marketers don't have formal digital training

Knowledge overwhelmingly gained on the job

ALL MARKETERS: HOW HAVE YOU ACQUIRED YOUR DIGITAL MARKETING KNOWLEDGE?



	MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436	DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
On-the-job experience	88%	81%	82%	86%
Watching what other brands/companies do	37%	36%	34%	37%
Trade conferences/seminars	22%	29%	26%	25%
Professional industry groups/communities	17%	24%	19%	20%
Online training courses/classes (outside of school)	17%	20%	18%	18%
In-person training courses/classes (outside of school)	17%	18%	17%	18%
In school: Full-time program (i.e., learned digital marketing in college or grad school)	20%	12%	16%	16%
In school: Part-time program (e.g., night school)	4%	5%	5%	5%
I don't have any specialized digital marketing knowledge	3%	5%	6%	4%

Differences that are statistically significant are indicated in **bold**

Q8. How have you acquired your digital marketing knowledge? Base: TOTAL (n=1017)

In your own words, what is the most important concern or issue for marketers today

*“Reaching consumers in an **over-saturated** market.”*

*“Reaching the **right** customer at the **right** time with the **right** message.”*

1. Reaching Customers
2. Keeping Current

*“**The fast pace of changing technology, and finding what works on different platforms.**”*

*“**Learning new technology while on the job.**”*

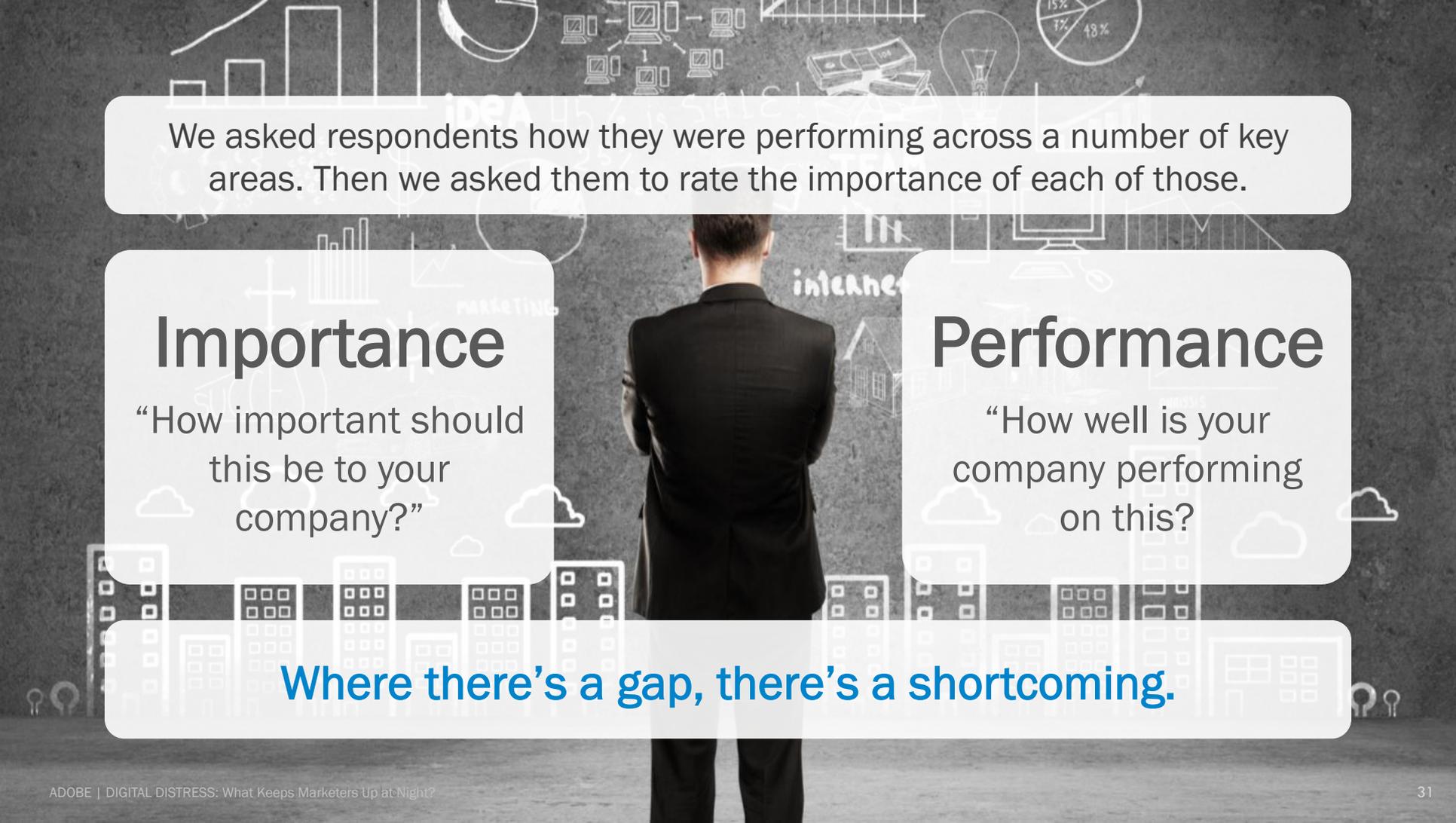
*“**Keeping up with changes in digital/Social Media Marketing and the level of creativity out there.**”*

*“**Just keeping up.**”*

*“**Getting ahead of curve - no longer enough just to keep up.**”*

A close-up photograph of a person's hands interacting with a tablet computer. The person is wearing a light blue, long-sleeved button-down shirt. The tablet screen displays a bar chart with several blue bars of varying heights. The person's right hand is pointing at the screen, while their left hand holds the bottom edge of the tablet. The scene is set on a dark brown wooden desk. To the left of the tablet is a white ceramic coffee cup filled with dark coffee, sitting on a matching white saucer. Behind the tablet, there are several sheets of white paper with printed text, and a silver and black pen lies on one of the papers. The lighting is soft and focused on the hands and the tablet.

3. KEY DRIVERS ANALYSIS



We asked respondents how they were performing across a number of key areas. Then we asked them to rate the importance of each of those.

Importance

“How important should this be to your company?”

Performance

“How well is your company performing on this?”

Where there's a gap, there's a shortcoming.

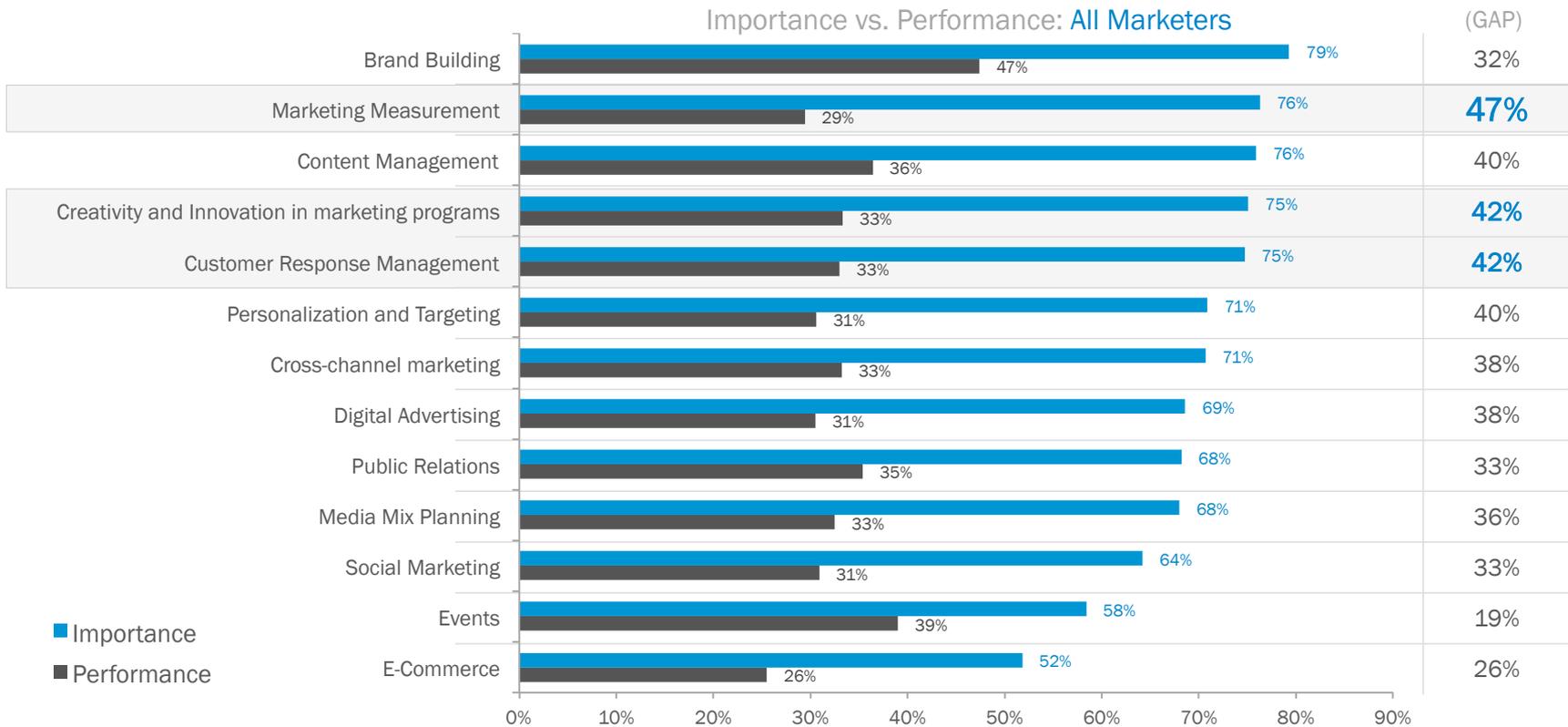


**#1 most important topic is
brand building.**

**#1 biggest gap is
marketing
measurement.**

Large gaps in measurement, but also creativity, CRM

Importance vs. Performance: All Marketers



Introduction to Correlation Analysis

Ultimately, we compared

Stated Marketing Importance

(what marketers *said* is important)

Derived Marketing Importance

(what *actually* correlates with digital marketing performance)

and determined

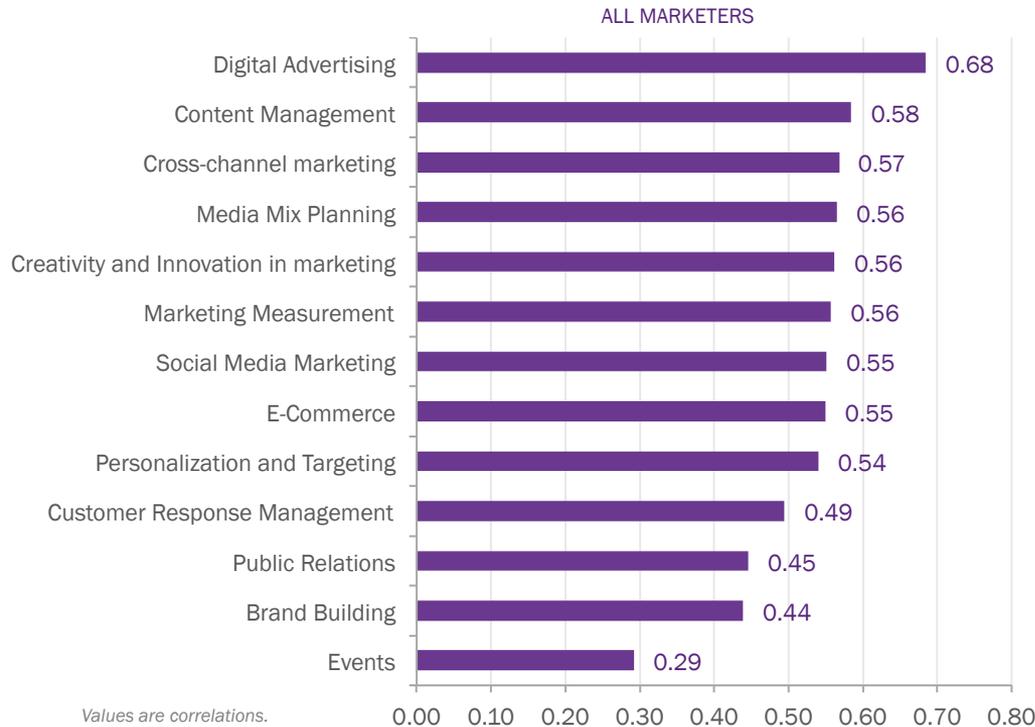
whether marketers' perceptions of importance matched up with what actually drove their digital marketing effectiveness.

Digital advertising– not brand building – is a key driver of digital marketing effectiveness

DERIVED IMPORTANCE: HOW IMPORTANT IS EACH CATEGORY TO OVERALL DIGITAL MARKETING EFFECTIVENESS?

ALL MARKETERS	DIGITAL MARKETERS	Vs.	MARKETING GENERALISTS
1. Digital Advertising	1 <i>Digital Advertising</i>		1 <i>Digital Advertising</i>
2. Content Management	2 <i>Cross-channel marketing</i>		2 <i>Content Management</i>
3. Cross-channel marketing	3 <i>Content Management</i>		3 <i>Social Media Marketing</i>
4. Media Mix Planning	4 <i>E-Commerce</i>		4 <i>Creativity & Innovation in marketing programs</i>
4. Creativity & Innovation in marketing programs	5 <i>Media Mix Planning</i>		5 <i>Media Mix Planning</i>
4. Marketing Measurement	6 <i>Marketing Measurement</i>		5 <i>Marketing Measurement</i>
5. Social Media Marketing	7 <i>Creativity & Innovation in marketing programs</i>		6 <i>Cross-channel marketing</i>
5. E-Commerce	7 <i>Personalization and Targeting</i>		6 <i>Personalization and Targeting</i>
6. Personalization and Targeting	8 <i>Social Media Marketing</i>		7 <i>E-Commerce</i>
7. Customer Response Management	9 <i>Customer Response Management</i>		8 <i>Customer Response Management</i>
8. Public Relations	9 <i>Public Relations</i>		9 <i>Brand Building</i>
9. Brand Building	10 <i>Events</i>		10 <i>Public Relations</i>
10. Events	11 <i>Brand Building</i>		11 <i>Events</i>

Each number indicates actual correlation – the closer to 1, the more it is correlated with success.



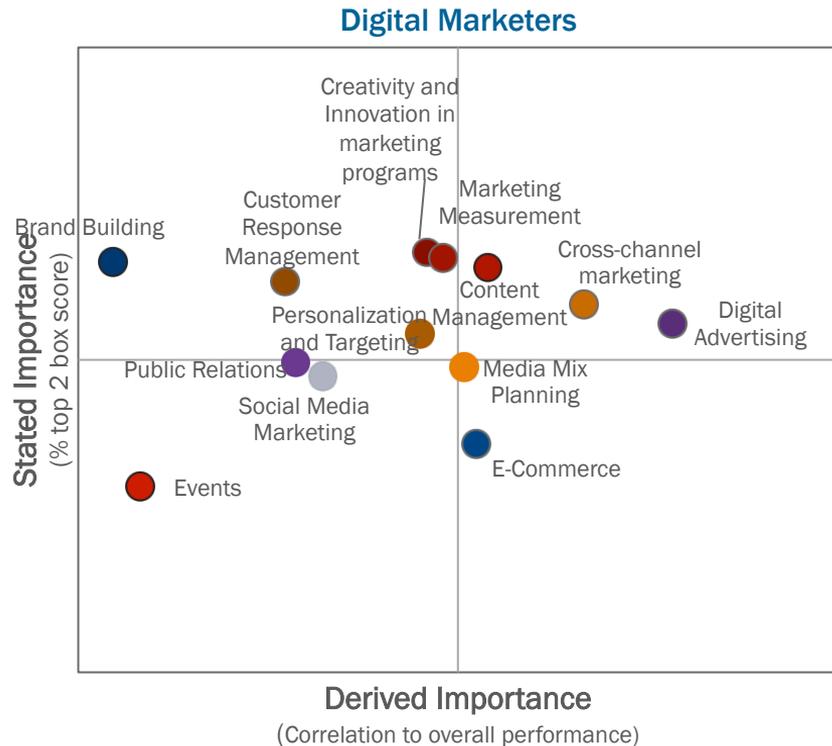
	MARKETING STAFF n=399-472	MARKETING DECISION MAKERS n=359 - 419	DIGITAL MARKETERS n=208-246	MARKETING GENERALISTS n=596-714
Digital Advertising	0.72	0.65	0.64	0.69
Content Management	0.60	0.58	0.52	0.61
Cross-channel marketing	0.57	0.58	0.58	0.57
Media Mix Planning	0.56	0.54	0.50	0.58
Creativity and Innovation in marketing	0.54	0.57	0.48	0.59
Marketing Measurement	0.59	0.55	0.49	0.58
Social Media Marketing	0.56	0.57	0.41	0.60
E-Commerce	0.52	0.57	0.51	0.56
Personalization and Targeting	0.54	0.54	0.48	0.57
Customer Response Management	0.51	0.47	0.39	0.54
Public Relations	0.46	0.41	0.39	0.48
Brand Building	0.46	0.38	0.27	0.5
Events	0.25	0.33	0.29	0.30

Differences that are statistically significant are indicated in **bold**
N varies due to some respondents indicating DK or NA.

Content management maintains strong importance across both stated and derived



Cross-channel marketing is a stronger driver of success among digital marketers.



STATED IMPORTANCE

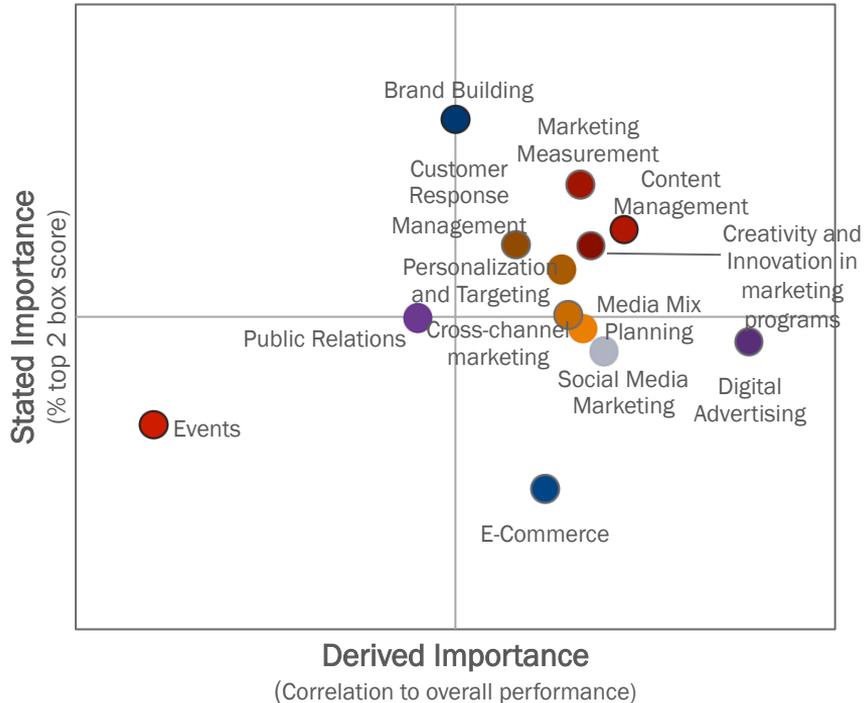
1. Content Management
2. Creativity and Innovation in marketing programs
3. Brand Building
4. Marketing Measurement
5. Digital Advertising
6. Customer Response Management
7. Cross-channel marketing
8. Personalization and Targeting
9. Social Media Marketing
10. Public Relations
11. Media Mix Planning
12. E-Commerce
13. Events

DERIVED IMPORTANCE

1. Digital Advertising
2. Cross-channel marketing
3. Content Management
4. E-Commerce
5. Media Mix Planning
6. Marketing Measurement
7. Creativity & Innovation in marketing programs
7. Personalization and Targeting
8. Social Media Marketing
9. Customer Response Management
9. Public Relations
10. Events
11. Brand Building

Marketing Generalists are more likely to rate everything as important and have less differentiated derived importance.

Marketing Generalists



Base: n=359-436

STATED IMPORTANCE

1. Brand Building
2. Marketing Measurement
3. Customer Response Management
4. Content Management
5. Creativity and Innovation in marketing programs
6. Personalization and Targeting
7. Cross-channel marketing
8. Public Relations
9. Media Mix Planning
10. Digital Advertising
11. Social Media Marketing
12. Events
13. E-Commerce

DERIVED IMPORTANCE

1. Digital Advertising
2. Content Management
3. Social Media Marketing
4. Creativity & Innovation in marketing programs
5. Media Mix Planning
5. Marketing Measurement
6. Cross-channel marketing
6. Personalization and Targeting
7. E-Commerce
8. Customer Response Management
9. Brand Building
10. Public Relations
11. Events

10. How effective is your company overall in terms of digital marketing? 12. Please tell us how well you feel your company is currently performing on each of the following: Base: TOTAL (n=804-1017)

A close-up photograph of a person's hands using a tablet computer on a dark wooden desk. The person is wearing a light blue dress shirt. To the left of the tablet is a white coffee cup filled with black coffee on a matching saucer. Behind the tablet are several sheets of white paper with printed text and a silver pen. The scene is lit from the top, creating soft shadows.

4. THE ROADMAP TO SUCCESS

We also wanted to see what **high performing companies** are doing and how they differ from companies that performed at or below average.

We asked respondents:

Q. “In the last twelve months, would you categorize your company as delivering...
(Please select one only)

a. **Superior business performance** (i.e. your company has out-performed key competitors in terms of sales or revenue)



We call these “**High Performers**”

b. **Average business performance** (i.e. your company performed similarly to key competitors)



c. **Below average business performance** (i.e. your company has recorded lower sales or revenue than key competitors)



We call these “**Lower Performers**”

Base: Superior business performance (n=371); Average OR below business performance (n=646)

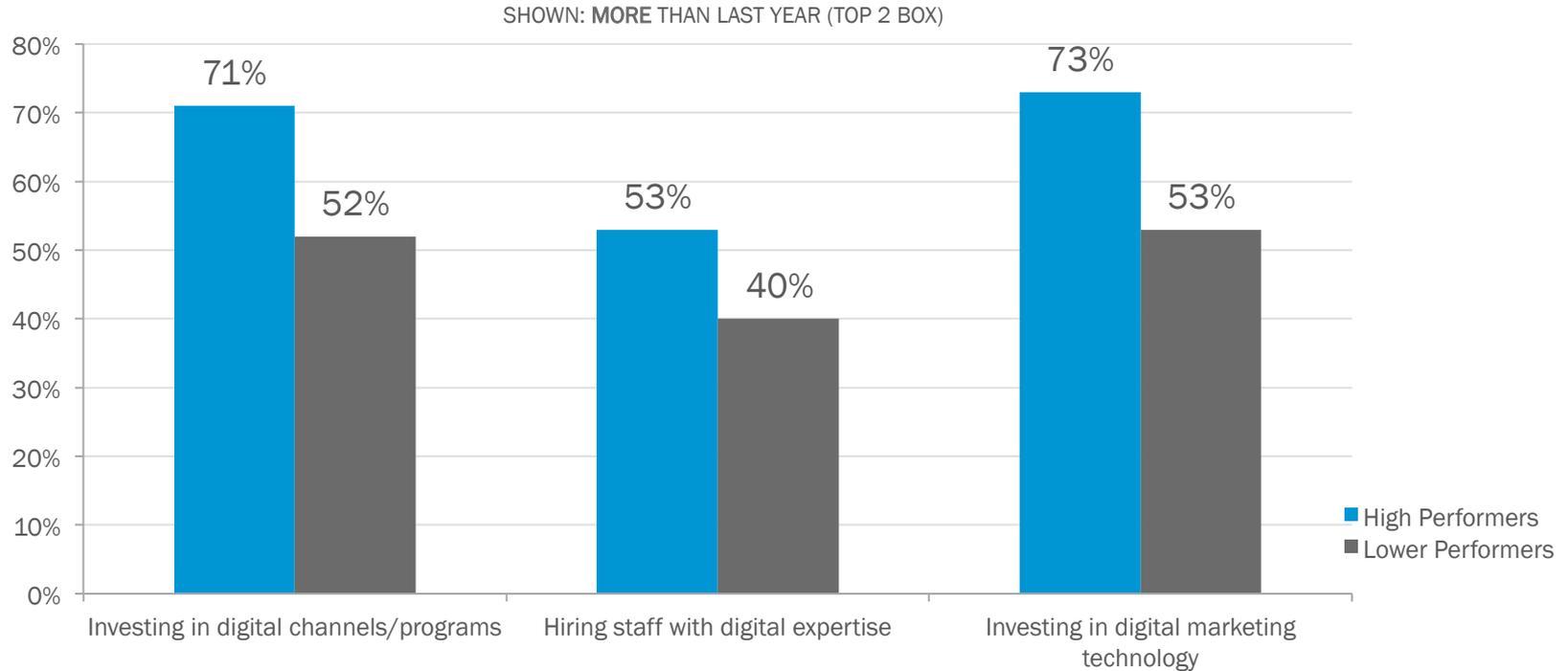
Marketers from high performing companies have a higher opinion of their marketing effectiveness and feel more prepared for digital marketing

DO YOU AGREE WITH THESE STATEMENTS? (% AGREE, TOP 2 BOX)

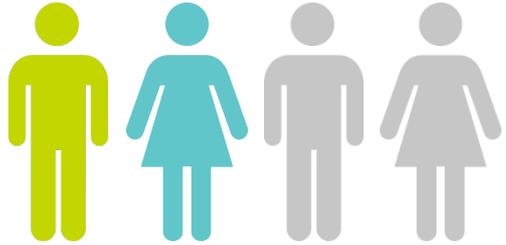


Q17. Please rate each of the following statements based on whether you agree or disagree: TOP 2 BOX
 Base: Superior business performance (n=371); Average OR below business performance (n=646)

High performing companies are investing more in digital

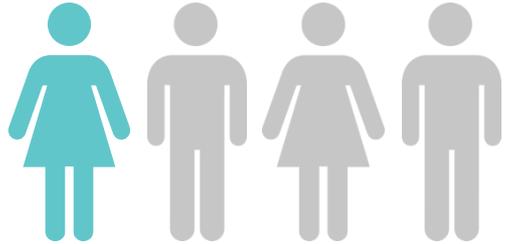


Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year.
Base: Superior business performance (n=371); Average OR below business performance (n=646)



At high performing companies,

half of marketers think the company's digital marketing expertise is proficient. While that is not particularly high...



...It's still better than **lower performing companies**, where it's only

one in four.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX
BASE: Superior business performance (n=371); Average OR below business performance (n=646)

High-performers are twice as likely to rate their company as proficient – and more likely to rate themselves and their colleagues as such



Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX
Base: Superior business performance (n=371); Average OR below business performance (n=646)

High performing companies have more faith in their company's marketing – but still less than half think their digital marketing is effective.

HIGH PERFORMERS

62%

Say their company is effective in overall marketing

49%

Say their company is effective in digital marketing

70%

Say "I know which of my marketing channels are most effective"

86%

Are satisfied with current marketing mix

68%

Say "I know that our digital marketing is working"

LOWER PERFORMERS

28%

Say their company is effective in overall marketing

22%

Say their company is effective in digital marketing

52%

Say "I know which of my marketing channels are most effective"

60%

Are satisfied with current marketing mix

43%

Say "I know that our digital marketing is working"

Q4. On a 0 to 10 scale where 0 is NOT AT ALL EFFECTIVE and 10 is EXTREMELY EFFECTIVE how effective is your company overall in terms of marketing?

Q10. Please indicate whether you agree or disagree with the following statements TOP 2 BOX

Base: Superior business performance (n=371); Average OR below business performance (n=646)

A close-up photograph of a person's hands using a tablet computer on a dark wooden desk. The person is wearing a light blue dress shirt. To the left of the tablet is a white coffee cup filled with dark coffee on a matching saucer. Behind the tablet, there are several sheets of white paper with printed text and a black pen. The scene is lit from the top, creating soft shadows.

5. WHAT'S ON MARKETERS' MINDS?

A man in a dark pinstriped suit jacket is seen from the back, looking towards a woman with long blonde hair. She is wearing a light blue sleeveless top and has her hand near her chin, appearing to be in a thoughtful or listening state. The background is a blurred office environment with computer monitors and other people.

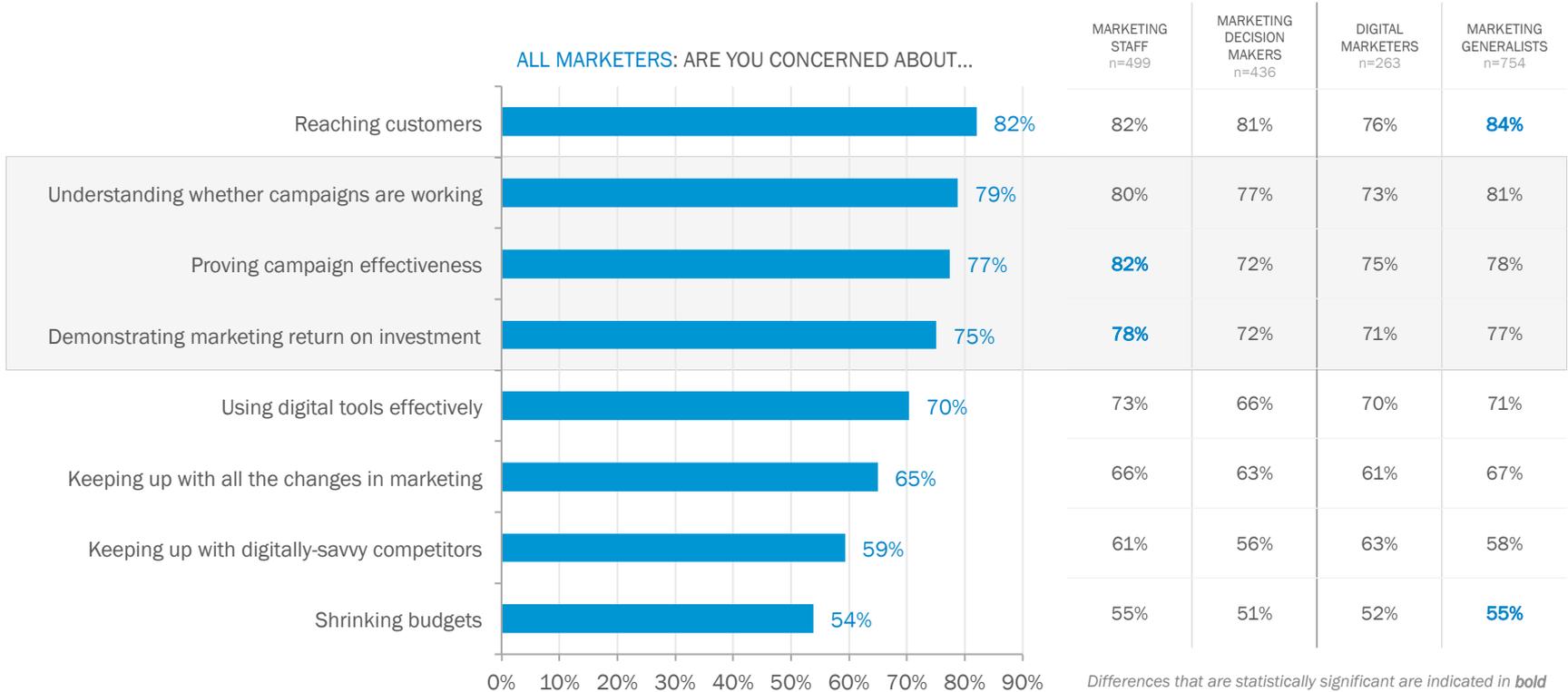
Unsurprisingly, the number one concern for marketers is reaching customers. *(It is, after all, their job.)*

However, their next three concerns are interesting, and they all deal with two broad topics:

Measurement & ROI.

Marketers want to know if they're on the right track

ALL MARKETERS: ARE YOU CONCERNED ABOUT...



Q2. As a marketer, how concerned are you about the following issues? Top 2 Box (Extremely concerned/Very concerned/Extremely concerned) Base: TOTAL (n=1017)

Digital marketers more concerned about ROI

ALL MARKETERS: WHAT ARE YOU MOST CONCERNED ABOUT?

1. Reaching customers
2. Understanding whether campaigns are working
3. Demonstrating marketing return on investment
4. Shrinking budgets
5. Proving campaign effectiveness
6. Using digital tools effectively
7. Keeping up with all the changes in marketing
8. Keeping up with digitally-savvy competitors

	MARKETING STAFF n=499	MARKETING DECISION MAKERS n=436	DIGITAL MARKETERS n=263	MARKETING GENERALISTS n=754
1. Reaching customers	1	1	1	1
2. Understanding whether campaigns are working	2	4	2	2
3. Demonstrating marketing return on investment	3	3	2	3
4. Shrinking budgets	5	2	4	2
5. Proving campaign effectiveness	4	5	3	4
6. Using digital tools effectively	6	6	5	5
7. Keeping up with all the changes in marketing	7	7	7	6
8. Keeping up with digitally-savvy competitors	7	8	6	7

When given a list of options, surprisingly few chose “keeping current” as the top concern – but when asked the same question **free-form**, it was the second most-specified issue.

Q3. Of those you just identified, which one do you find the most concerning? Base: TOTAL (n=1017)



66% of all marketers state companies won't succeed unless they have a digital marketing approach.



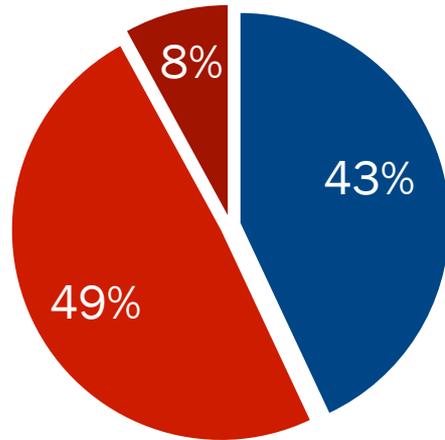
APPENDIX

A close-up photograph of a person's hands interacting with a tablet computer. The person is wearing a light blue, long-sleeved button-down shirt. The tablet is held in the left hand, and the right hand is touching the screen, which displays a bar chart with blue bars. The scene is set on a dark brown wooden desk. To the left of the tablet is a white ceramic coffee cup filled with dark coffee, sitting on a matching white saucer. Behind the tablet and to the right is a white sheet of paper with printed text, and a silver and black pen lies on it. The lighting is soft and focused on the hands and the tablet.

DEMOGRAPHICS

Demographics

Marketing Decision Makers vs. Staff



- Senior Manager/Marketing Decision Maker
- Marketing Staff
- Other

TOP TITLES

Senior Manager/Marketing Decision Maker

16% Director/Department Head

6% Partner/Principle

5% VP/Assistant VP

Marketing Staff

28% Manager/Senior Manager

21% Coordinator/Specialist/Associate

S5a. Please indicate your title from the list below: Base: TOTAL (n=1017)

Demographics

59%
Marketing Generalists
41%
Digital Marketers

60%
Studied marketing in school
40%
Did not study marketing in school

Software/Products/Services Authority

51%
Decision
makers



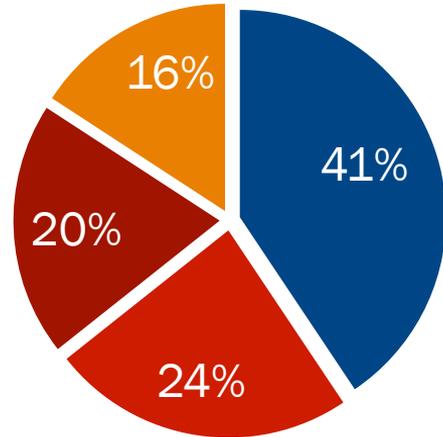
D9. Did you study marketing in school? Base: TOTAL (n=1017)

S3. Please indicate below which option more closely describes your marketing role in your current company: "Marketing that is predominantly digitally focused"/"More traditional marketing but may employ some digital marketing tools (Generalist)" Base: TOTAL (n=1017)

D6. Which ONE of the following best describes your role in DECIDING WHICH digital marketing solutions (e.g., software products and services) you and/or your department will use for work? Base: TOTAL (n=1017)

Demographics

Company Size



- Small (Fewer than 100 employees)
- Medium (100-999 employees)
- Large (1,000-9,999 employees)
- Enterprise (9,999 + employees)

Organization Marketing Efforts

38% Traditional (25% or less digital marketing)

51% Mix (Between 26-75% digital marketing)

11% Mostly (76% + digital marketing)

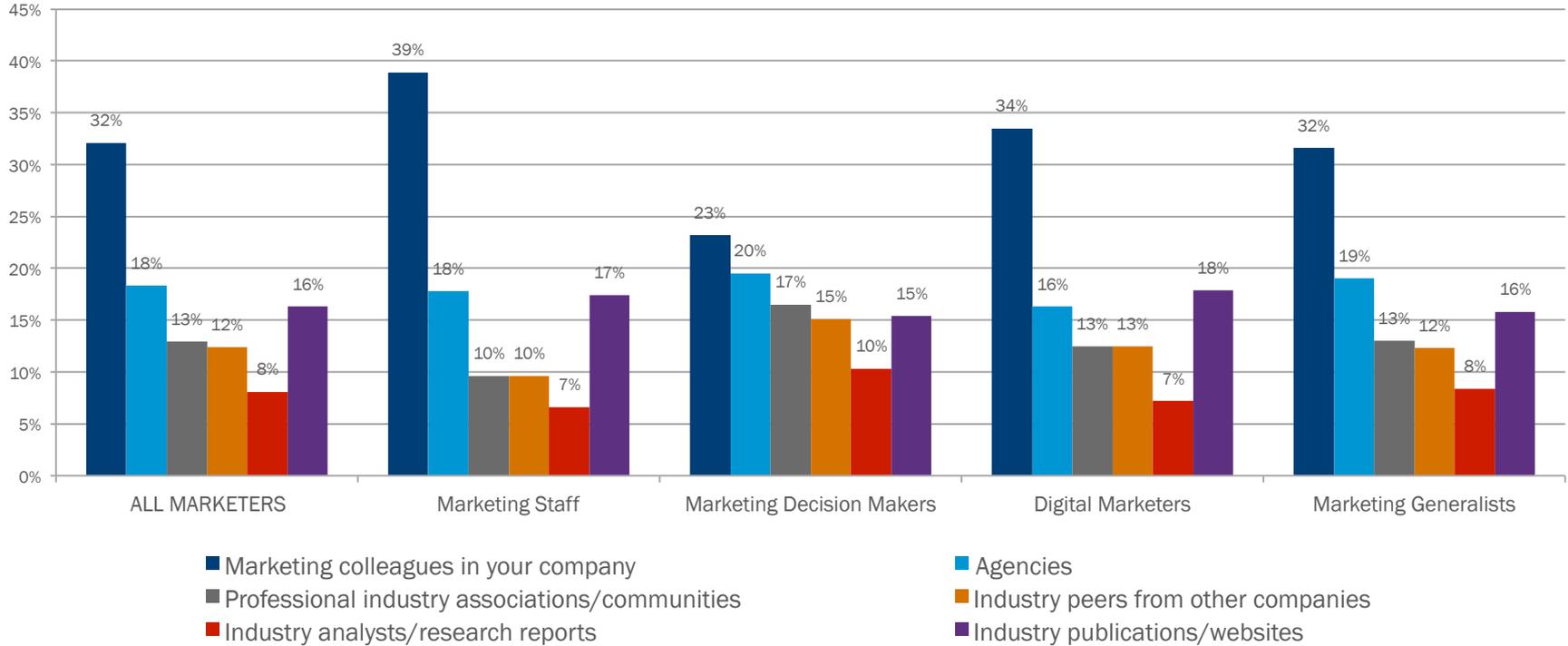
S2. What percent of your company's marketing efforts are spent on online and digital marketing activities? Base: TOTAL (n=1017)
S6. Which of the following ranges would most closely describe the number of full-time employees working across your organization, including all locations? Base: TOTAL (n=1017)



ADDITIONAL INFORMATION

Who do you turn to?

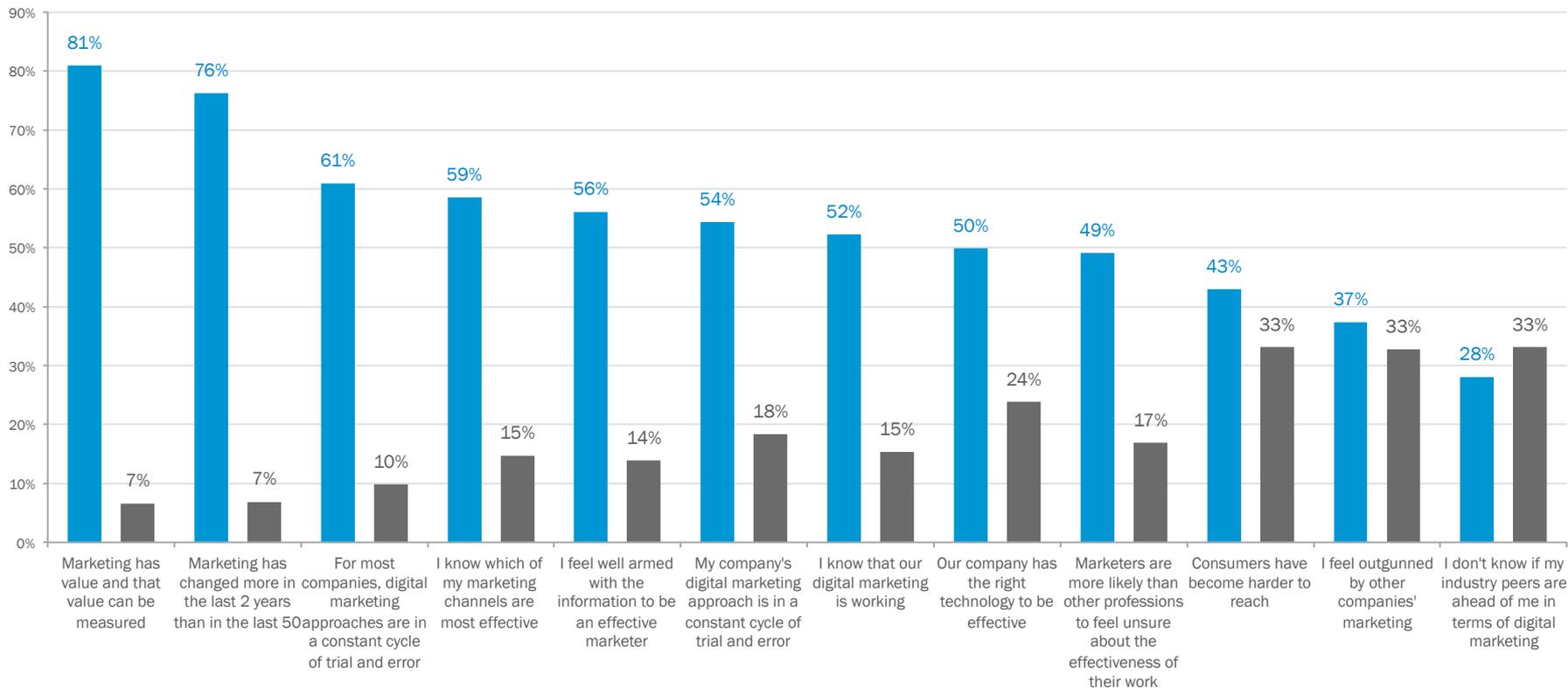
WHO DO YOU TURN TO FIRST FOR DIGITAL MARKETING ADVICE?



Q19. Who do you turn to first for digital marketing advice? TOP 2 BOX Base: TOTAL (n=1017)
MARKETING STAFF (n=499) MKTING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)

More than ½ think digital marketing is trial and error

ALL MARKETERS



Marketing mix satisfaction

- **69%** are satisfied with current marketing mix
- **17%** are not satisfied with current marketing mix

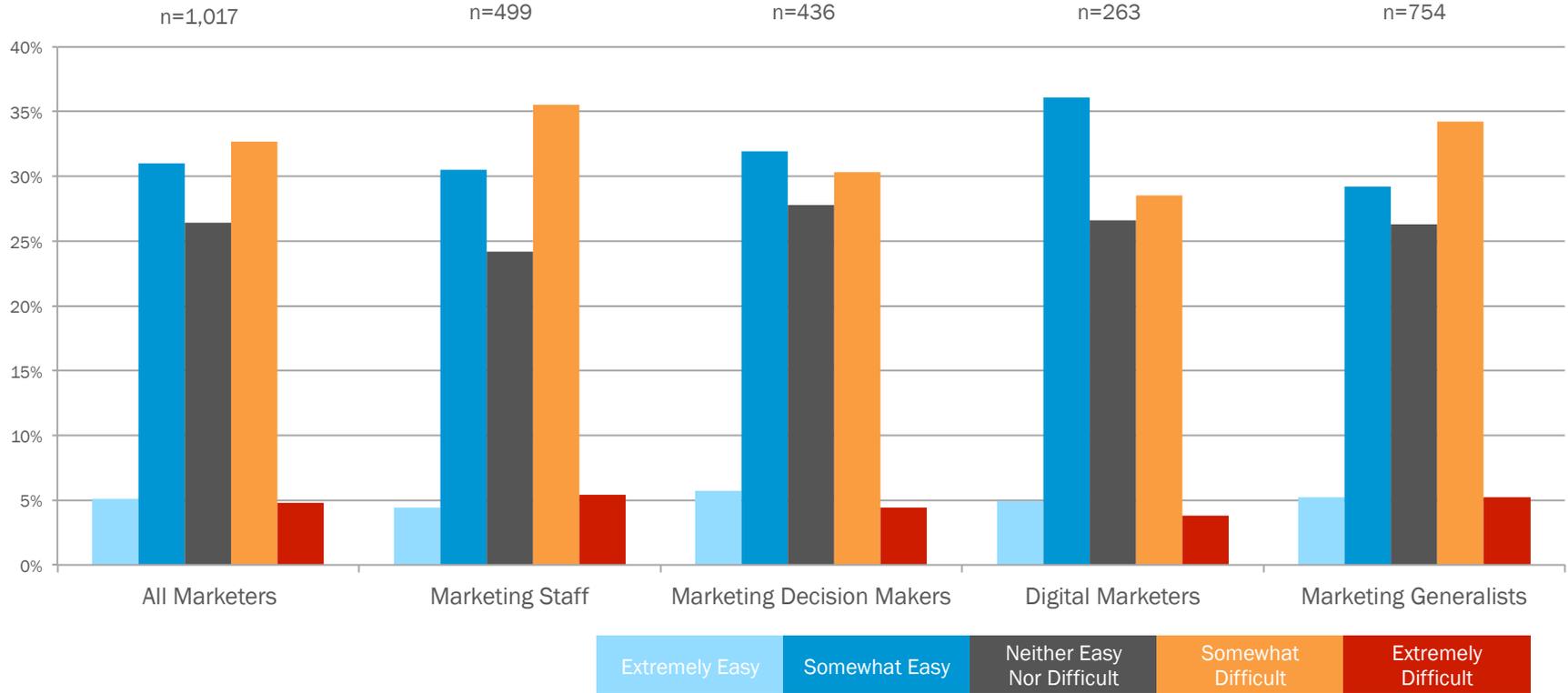
Marketers want to boost investments in:

1. TV **2. Print** **3. Social**

Q7a. How satisfied are you with your current marketing mix? TOP 2 BOX/BOTTOM 2 BOX Base: TOTAL (n=1017)

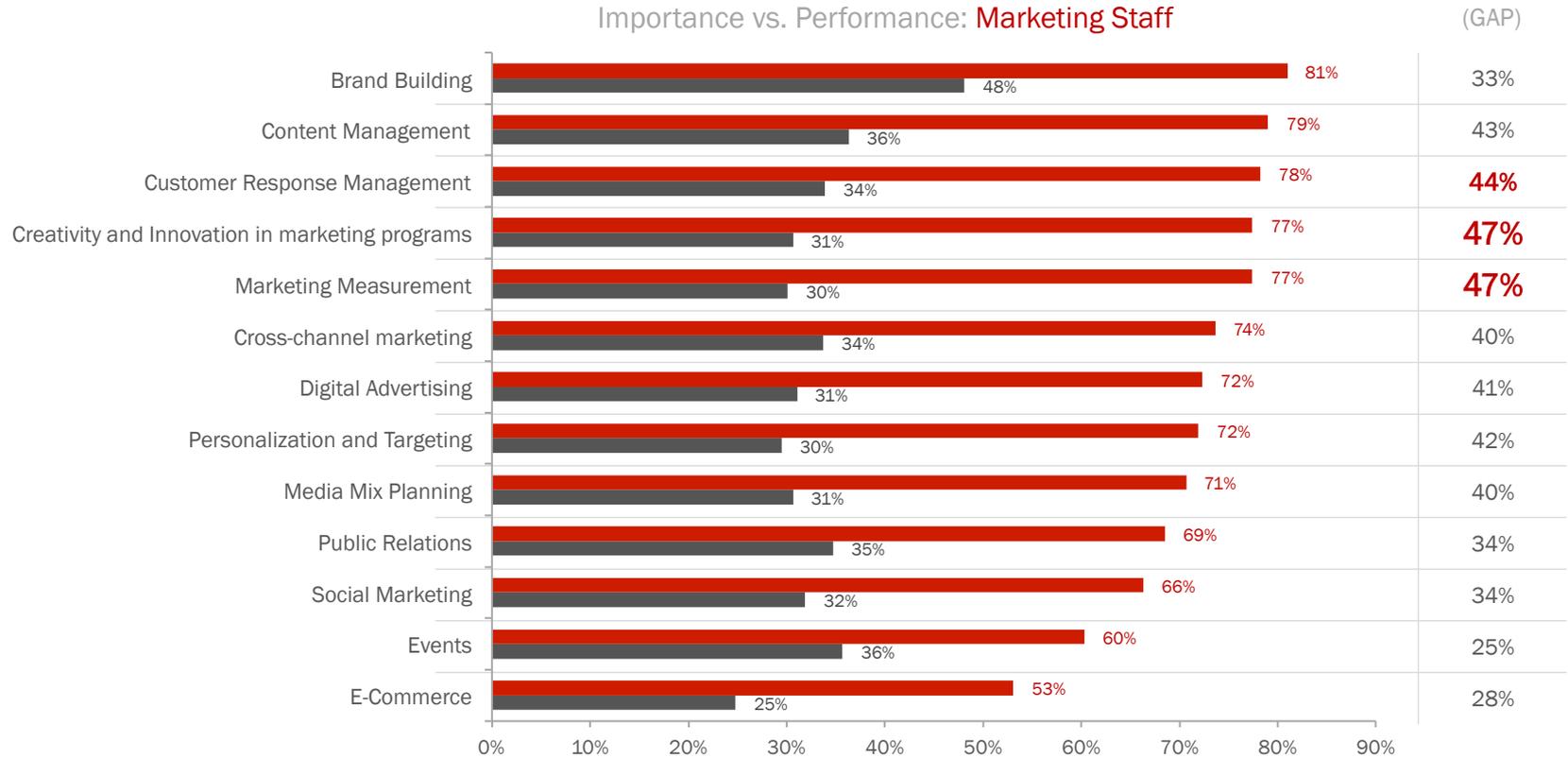
Q7b. You indicated you are not satisfied with your current marketing mix. Please select the areas where you wish you could invest more. Base: TOTAL (n=1017)

How easy is it to prove ROI to management?



Q21. Looking ahead to the next 12 months, do you think it will be more or less important for your marketing function/team to prove business impact and/or return on its financial investment (ROI)?

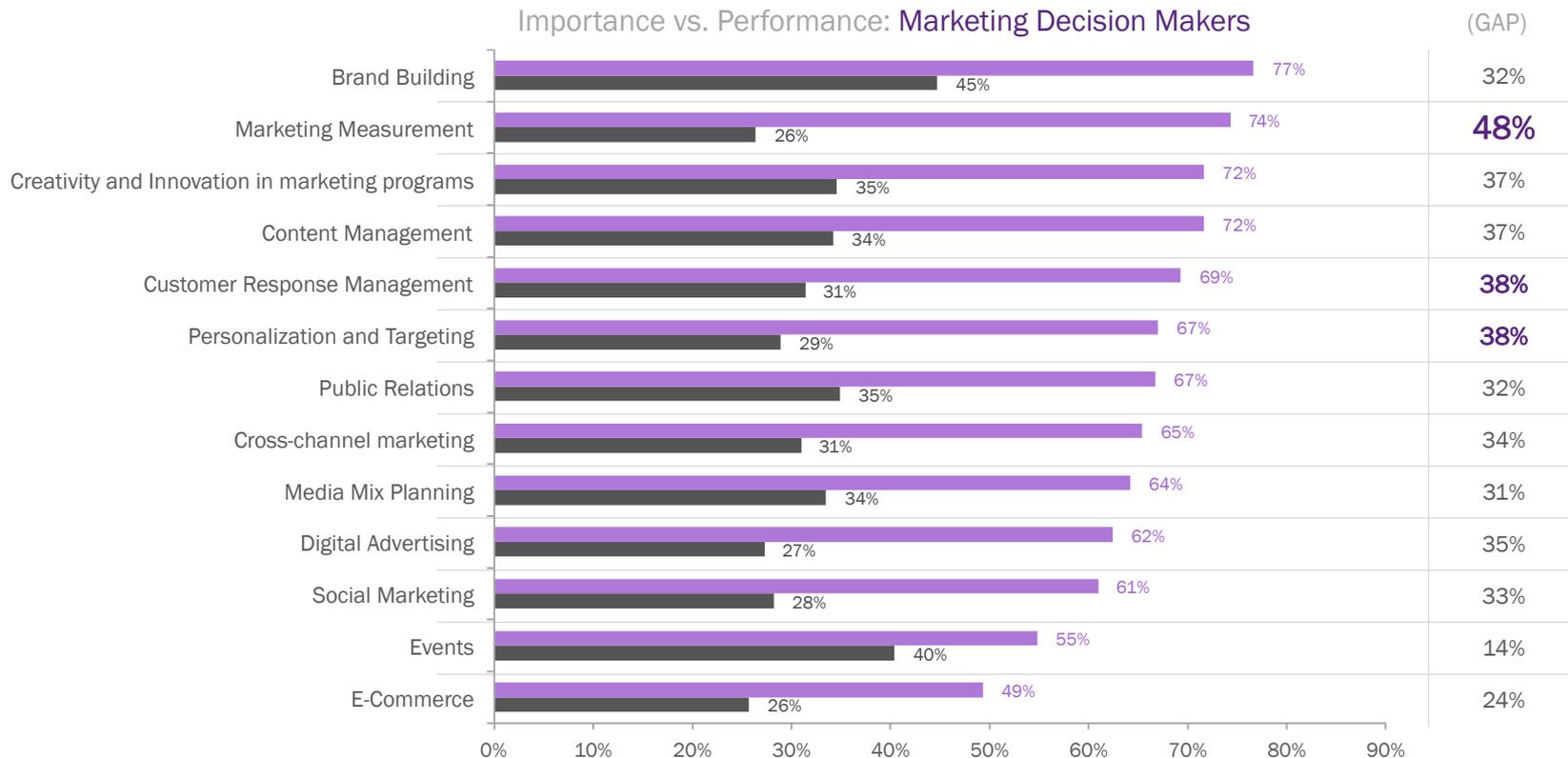
Marketing measurement and creativity fall short among staff



Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=499)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=499)

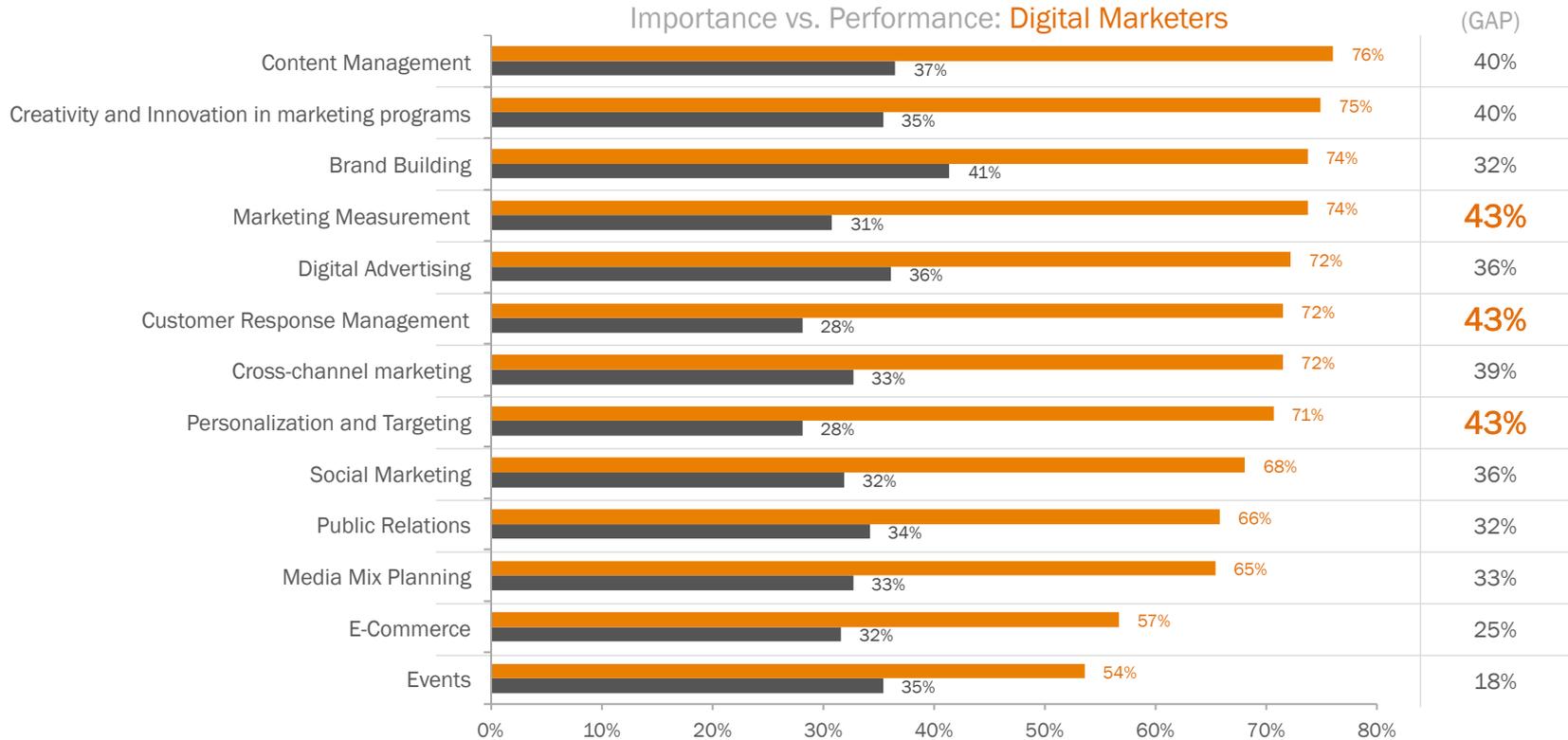
Decision Makers see opportunity in customer response management and targeting



Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=436)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=436)

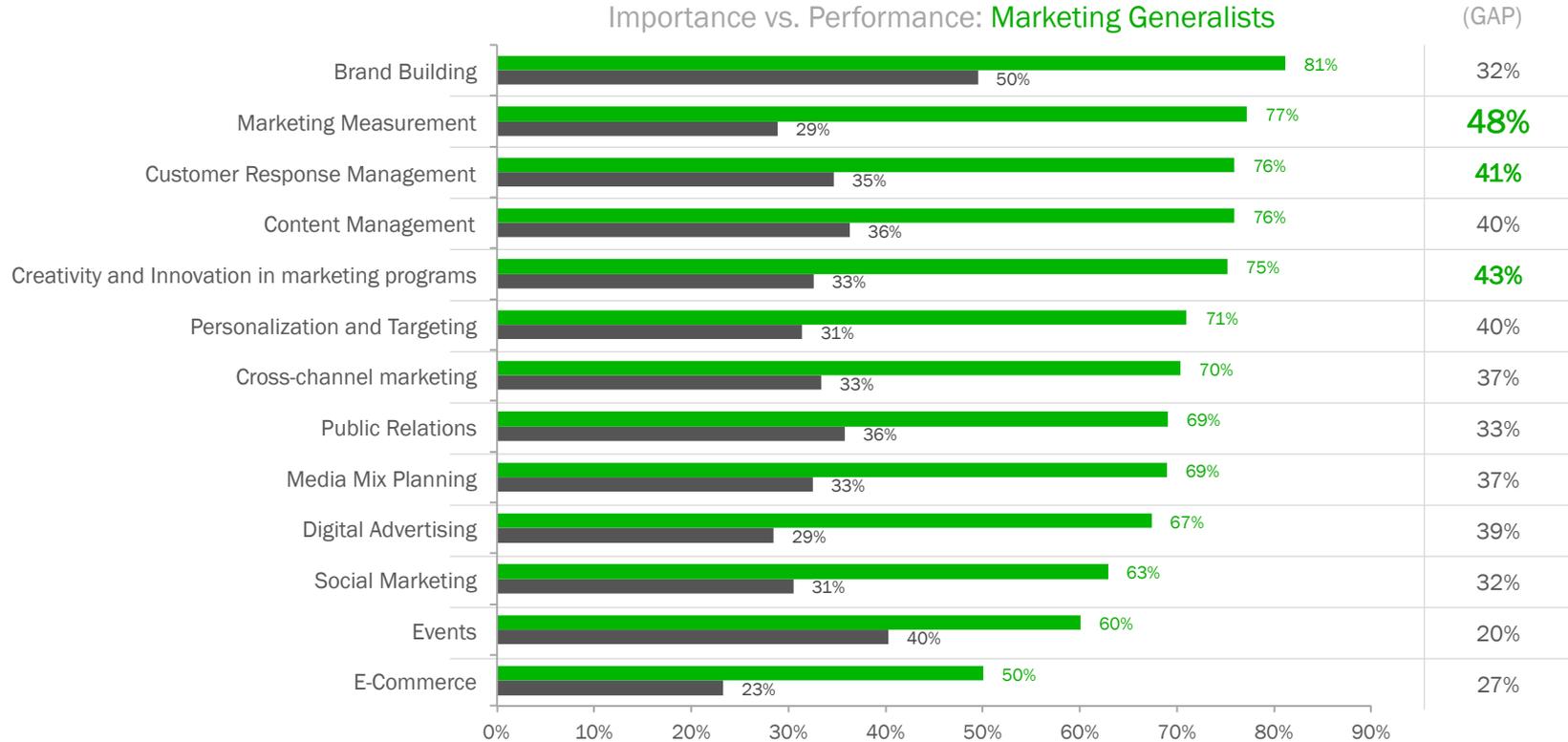
Digital Marketers see opportunity in customer response management and targeting



Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=263)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=263)

Generalists see opportunity in creativity and customer response management



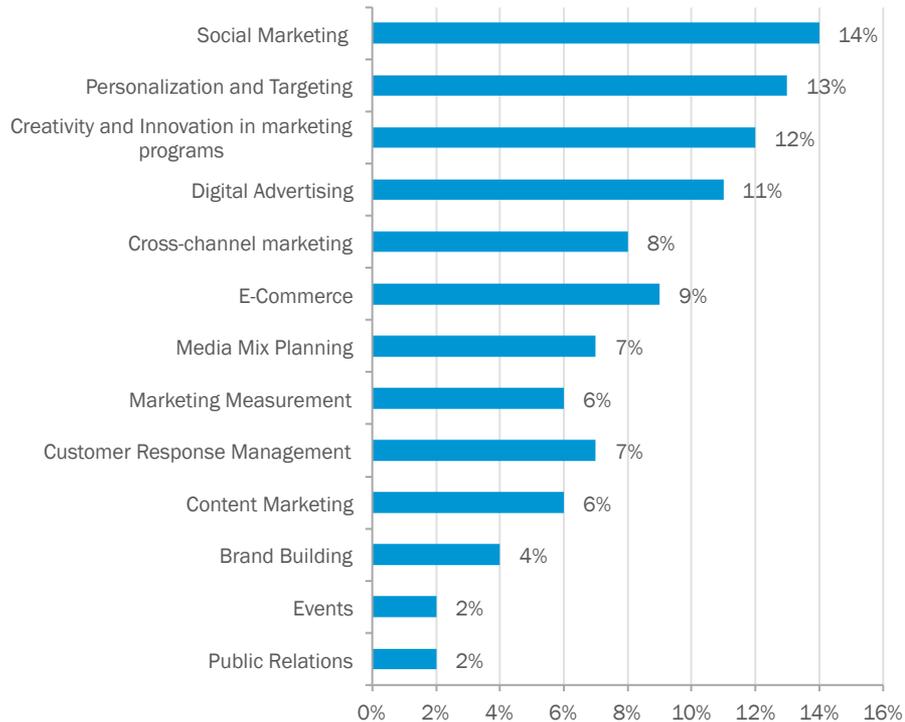
Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=754)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=754)

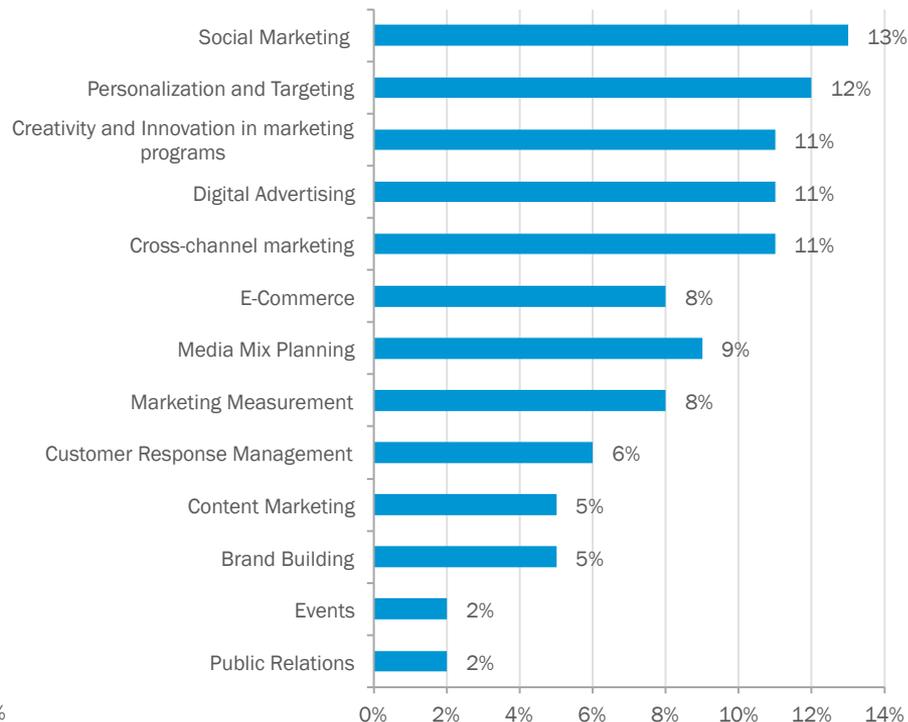
Social media on the rise

WHAT DO YOU THINK WILL BE THE MOST IMPORTANT TO MARKETERS IN THE NEXT 3 YEARS?

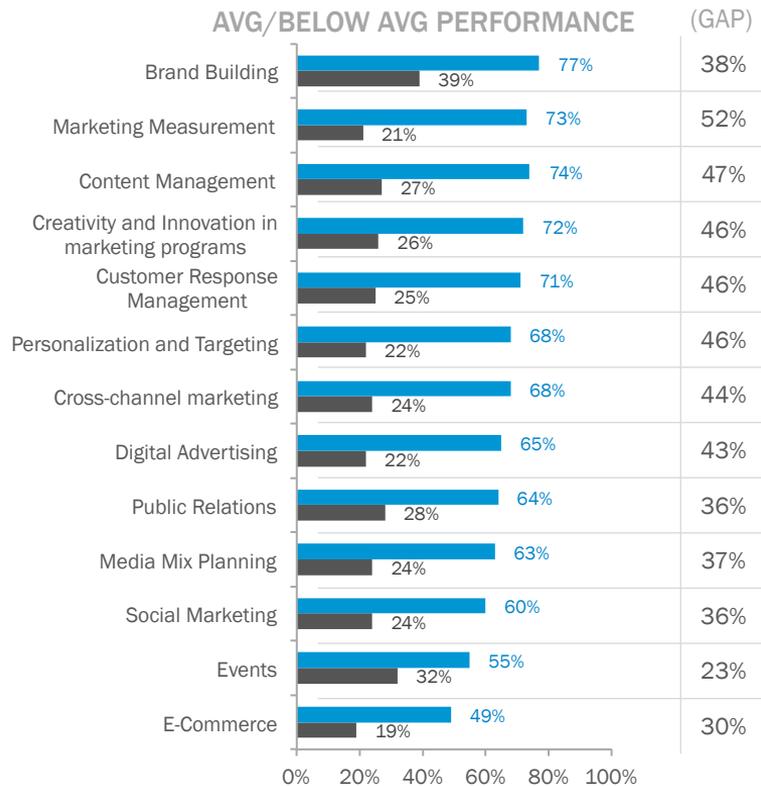
SUPERIOR PERFORMANCE



AVG/BELOW AVG PERFORMANCE



Greater gap between importance and performance among lower performing companies



Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX; Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: Superior business performance (n=371); Average OR below business performance (n=646)