



Marketing in a Post-Covid Era

Topline Report

September 2022

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This 29th Edition of The CMO Survey examines how marketers are approaching strategies, spending, and organization in a post-Covid environment. Results show that some aspects of marketing have changed quite a bit over the last three years, while other aspects that were changed dramatically during Covid have returned to pre-Covid levels.

Optimism for the U.S. economy hit 57.2 (out of 100)—up from 50.9 at the height of the pandemic in June 2020 and the all-time low of 47.7 in February 2009 during the Great Recession, but down from 66.8 reported in February 2022. Customers' continue to prioritize product quality as they did throughout the pandemic, but low price has now emerged as a priority given inflationary pressures. The pandemic has changed the use of channels—marketers are using a larger number of channels (65%) and are using social channels to sell (41%). Only 10.5% of marketers report their former face-to-face channels are now all digital and 50% report their companies are returning to or opening up face-to-face channels.

The pandemic's acceleration of digital marketing investments has pushed marketing budgets as a percent of company budgets up to the highest level in CMO Survey history. This level also corresponds to the growing importance of marketing in organizations, which has increased in more than half of all companies during the pandemic. Marketing budgets as a percent of revenues revert to pre-pandemic levels, reflecting the 12.3% growth in revenues over the last year from the 0.3% increase reported in February 2021 at the height of the pandemic.

Marketers report 10.4% growth in marketing spending over the last year, but predict this level will decrease and start trending toward the pre-Covid level of 5.8% growth in the next year. Brand, CRM, and innovation investments follow the same pattern—all growing, but reverting to levels closer to pre-Covid levels. Traditional advertising spending returns to negative growth after temporary lifts across the last two surveys, restarting a decade-long decline. Mobile spending as a percent of marketing budgets is flat at 13.7% and has returned to pre-pandemic levels (13.5%) after climbing to a high of 23% during the pandemic. Spending on social media has also been flat at 14%-15% of budgets over the last 18 months, coming off a June 2020 Covid splurge when spending reached 23.2% of marketing budgets.

Spending on marketing analytics as a percentage of the marketing budget hit an all-time high of 8.9% after a decade-long level of 6%-7%. Marketing analytics is now being used in nearly half of all marketing decisions, rising from 38% just before the pandemic. Companies have also made progress achieving a contribution from marketing analytics to company performance. Marketers have invested in building their knowledge resources through the pandemic—nearly doubling investments in developing knowledge about how to do marketing and tripling investments in marketing research and intelligence. These investments have paid off with the quality of all marketing knowledge resources rising during this period. Market research has changed during the pandemic, with more companies studying online consumer behavior (63.3%) and using more video interviews (57.8%). Only 18% are doing more text analysis, which is somewhat surprising given its availability to most marketers.

The size of marketing organizations grew by 15.1% in the last year but is expected to drop to 7.3% growth in the next year, reverting closer to growth rates reported before the pandemic. Work from home is now prevalent across industries and economic sectors, with 57.5% of marketers reporting their teams working from home at least some of the time and 48.7% working from home all of the time. Overall, marketing

leaders are confident in team productivity in both arrangements, with 50% reporting no change in worker productivity levels. Marketing leaders are more worried about company culture with more than a third reporting that working from home has weakened it. In accord with a weakened culture, 45% of marketing leaders report that young marketers are socialized less within the company.

Marketing leaders were invited to attend board meetings (4.9 on a 7-point scale where 1=not at all, 7=very highly), with 63% of marketers reporting participation levels above the midpoint of the scale (5 or more). These numbers show that marketing has a reasonably strong seat at the table in many companies. The percentage of marketing leaders who report their companies would use their brands to take a stand on politically charged issues reached a CMO Survey high at 30.2% of companies up from the pre-Covid level of 18.5%. When asked about actions to reduce the negative impact of marketing-related activities on the ecological environment, levels show increases from last year but have not yet rebounded to pre-Covid levels, except in changes to the brand.

All three reports contain other topics and metrics that I hope you will find useful as you navigate this post-Covid environment.

A handwritten signature in black ink, reading "Christine Moorman". The signature is fluid and cursive, with a large, sweeping flourish at the end.

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Founder and Director, The CMO Survey®



Marketing in a Post-Covid Era

The 29th Edition of The CMO Survey, September 2022

Survey Sample

2937 marketing leaders at U.S. for-profit companies; 273 responded for a 9.3% response rate—95.6% of respondents are VP-level or above.

Survey Administration

The survey was in field from July 12-August 4, 2022. It was administered via email with follow-up reminders.

Survey Reports

- [Topline Report](#) offers an aggregate view of survey results
- [Highlights and Insights Report](#) shares key survey metrics, trends, and insights over time
- [Firm and Industry Breakout Report](#) displays survey results by sectors, headcount, and sales

Overview of The CMO Survey®

Mission: To collect and disseminate the opinions of top marketers in order to predict the future of markets, track marketing excellence, and improve the value of marketing in organizations and society.

Administration: Founded in August 2008, The CMO Survey is administered twice a year. Questions repeat to observe trends over time and new questions are added to tap into marketing trends. The survey is an objective source of information about marketing and a non-commercial service dedicated to improving the field of marketing.

Sponsors: Deloitte LLP, Duke University's Fuqua School of Business and the American Marketing Association. Sponsors support The CMO Survey with intellectual and financial resources. Survey data and participant lists are held in confidence and not shared with survey sponsors or any other parties.

Deloitte.



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**Topic 1: Macroeconomic Forecasts****Are you more or less optimistic about the U.S. economy compared to last quarter?**

	Number	Percent	95% CI
3=More	29	12.1 %	± 3.7 %
2=No Change	52	21.7 %	± 4.7 %
1=Less	159	66.3 %	± 5.9 %
Total	240	100.0 %	

Mean = 1.46

SD = 0.70

Missing Cases = 33

Response Percent = 87.9 %



Topic 1: Macroeconomic Forecasts

Rate your optimism about the U.S. economy on a scale from 0-100 with 0 being the least optimistic.

Minimum = 19.35

Maximum = 90

Mean = 57.22

Median = 60

Standard Deviation (Unbiased Estimate) = 18.40

95 Percent Confidence Interval Around the Mean = 54.89 - 59.55

Valid Cases = 239

Missing Cases = 34

Response Percent = 87.5%



Topic 1: Macroeconomic Forecasts

Are current inflationary pressures impacting marketing spending levels in your company?

	Number	Percent	95% CI
Yes, inflationary pressures are increasing marketing spending levels	40	16.7 %	± 4.2 %
Yes, inflationary pressures are decreasing marketing spending levels	101	42.3 %	± 5.8 %
No	98	41.0 %	± 5.7 %
Total	239	100.0 %	

Missing Cases = 34

Response Percent = 87.5 %

**Topic 1: Macroeconomic Forecasts****Are current inflationary pressures influencing how you conduct marketing in your company?**

	Number	Percent	95% CI
Yes	145	60.7 %	± 6.0 %
No	94	39.3 %	± 5.7 %
Total	239	100.0 %	

Missing Cases = 34

Response Percent = 87.5 %



Topic 1: Macroeconomic Forecasts

Which aspects of your marketing activities have been influenced by inflationary pressures?

	Number	Percent	95% CI
Higher prices	133	64.9 %	± 6.6 %
Stronger value proposition	82	40.0 %	± 6.8 %
Stronger brand building investments	55	26.8 %	± 6.1 %
More automated marketing	54	26.3 %	± 6.1 %
Lower innovation levels	39	19.0 %	± 5.4 %
More promotional activities	38	18.5 %	± 5.4 %
Add new channels	33	16.1 %	± 5.1 %
Add new markets	31	15.1 %	± 4.9 %
More marketing employee layoffs	26	12.7 %	± 4.6 %
Total	491		

Number of Cases = 205

Number of Responses = 491

Average Number of Responses Per Case = 2.4

Number of Cases With At Least One Response = 205

Response Percent = 100.0 %



Topic 2: Customer Behavior and Channels

For this market, rank your customers' top three priorities (1, 2, 3) over the next 12 months, where 1 is most important.

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	1.95 0.86	40 17.2%	26 11.2%	35 15.0%	101 43.3%
Superior product quality	1.70 0.77	70 30.0%	47 20.2%	27 11.6%	144 61.8%
Superior innovation	1.98 0.86	22 9.4%	16 6.9%	21 9.0%	59 25.3%
Excellent service	1.99 0.77	43 18.5%	59 25.3%	42 18.0%	144 61.8%
Trusting relationship	2.10 0.81	34 14.6%	42 18.0%	46 19.7%	122 52.4%
Customer experience	2.22 0.78	22 9.4%	36 15.5%	45 19.3%	103 44.2%
Creating a positive impact on the world	2.58 0.64	2 0.9%	7 3.0%	17 7.3%	26 11.2%



Topic 2: Customer Behavior and Channels

Will you use a channel or go directly to market?

	Number	Percent	95% CI
Uses channel partners	176	64.5 %	± 5.7 %
Does not use channel partners	97	35.5 %	± 5.7 %
Total	273	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %



Topic 2: Customer Behavior and Channels

Which statements reflect how your channel strategy has changed over the last three years?

	Number	Percent	95% CI
We increased the number of channels we use	99	65.1 %	± 7.7 %
We are starting to return to or open new face-to-face channels	76	50.0 %	± 8.0 %
We are using our social channels to sell products and services	63	41.4 %	± 7.9 %
We added a direct-to-consumer/customer channel of any type	47	30.9 %	± 7.4 %
Our former face-to-face channels have all become digital	16	10.5 %	± 4.9 %
We have integrated gaming into our channels to sell	2	1.3 %	± 1.8 %
Total	303		

Number of Cases = 152

Number of Responses = 303

Average Number of Responses Per Case = 2.0

Number of Cases With At Least One Response = 152

Response Percent = 100.0 %



Topic 3: Marketing Spending

Marketing expenses account for what percent of your company's overall budget?

Minimum = 0

Maximum = 45.13

Mean % = 13.80

Median = 10

Standard Deviation (Unbiased Estimate) = 13.42

95 Percent Confidence Interval Around the Mean = 11.60 - 16.01

Valid Cases = 142

Missing Cases = 131

Response Percent = 52.0%



Topic 3: Marketing Spending

Marketing expenses account for what percent of your company's revenues?

Minimum = 0

Maximum = 40.79

Mean % = 8.69

Median = 4

Standard Deviation (Unbiased Estimate) = 11.30

95 Percent Confidence Interval Around the Mean = 6.93 - 10.46

Valid Cases = 157

Missing Cases = 116

Response Percent = 57.5%



Topic 3: Marketing Spending

Marketing expenses in your company include the following categories:

	Number	Percent	95% CI
Direct expenses of marketing activities	147	89.6 %	± 4.7 %
Brand-related expenses	145	88.4 %	± 5.0 %
Social media marketing	145	88.4 %	± 5.0 %
Marketing analytics	138	84.1 %	± 5.7 %
Marketing employees	132	80.5 %	± 6.1 %
Marketing technologies	125	76.2 %	± 6.6 %
Marketing research	119	72.6 %	± 6.9 %
Other overhead costs associated with marketing	100	61.0 %	± 7.5 %
Marketing training	93	56.7 %	± 7.7 %
Customer experience expenses	90	54.9 %	± 7.7 %
Mobile marketing	86	52.4 %	± 7.7 %
Sales support tools	59	36.0 %	± 7.4 %
Sales employees	24	14.6 %	± 5.5 %
Total	1403		

Number of Cases = 164

Number of Responses = 1403

Average Number of Responses Per Case = 8.6

Number of Cases With At Least One Response = 164

Response Percent = 100.0 %



Topic 3: Marketing Spending

Compared to your company's R&D budget, what is the size of your company's marketing budget?

	Number	Percent	95% CI
Marketing Budget > R&D Budget			
50% or more	30	20.5 %	± 3.8 %
40%	3	2.1 %	± 1.3 %
30%	6	4.1 %	± 1.8 %
20%	10	6.8 %	± 2.3 %
10%	4	2.7 %	± 1.4 %
5%	5	3.4 %	± 1.6 %
Marketing Budget = R&D Budget	19	13.0 %	± 3.1 %
R&D Budget > Marketing Budget			
10%	5	3.4 %	± 1.6 %
20%	9	6.2 %	± 2.1 %
30%	10	6.8 %	± 2.3 %
40%	8	5.5 %	± 2.0 %
50% or more	37	25.3 %	± 4.1 %
Total	146	100.0 %	

Mean = R&D Budgets are 4.35% larger than Marketing Budgets

SD = 37.63%

Missing Cases = 127

Response Percent = 53.5 %



Topic 3: Marketing Spending

By what percent has your marketing spending changed in the prior 12 months?

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	10.43	25.93	6.43 - 14.42	5	-48.22	72.73	162
Digital marketing spending	14.99	26.32	10.89 - 19.10	10	-50	100	158



Topic 3: Marketing Spending

What percent of your marketing budget does your company currently spend on digital and non-digital marketing activities?

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
% Digital	57.9	28.4	53.5 - 62.3	60	0	100	162
% Non-digital	42.1	28.4	37.7 - 46.5	40	0	100	162



Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	10.07	17.62	7.25 - 12.89	5	-35.17	57.35	150
Brand building	9.57	15.97	7.00 - 12.15	5	-30.47	51.94	148
Overall marketing spending	8.78	18.56	5.84 - 11.72	5	-37.45	57.97	153
Customer relationship management	6.78	9.75	5.19 - 8.38	0	-10	32.54	144
Customer experience spending	6.19	9.84	4.57 - 7.82	0.50	-20	37.58	141
New product introductions	5.59	10.80	3.83 - 7.35	0	-23.84	35.91	144
New service introductions	4.27	8.76	2.82 - 5.71	0	-20	30.42	142
Traditional advertising spending	-0.71	11.32	-2.56 - 1.13	0	-35.58	33.27	145



Topic 3: Marketing Spending

For your marketing budget allocated to digital spending, what percent of this budget is allocated to paid, owned, and earned media?

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Paid media (including SEO, SEM, display, influencer marketing, paid social, digital TV advertising, digital shopper marketing, sponsored digital video, or video advertising, etc.)	44.02	30.18	39.48 – 48.55	50	0	100	170
Owned media (including content marketing, email marketing and marketing automation, own site and store development, or post-sales digital support such as chatbots, etc.)	34.38	26.54	30.39 - 38.37	25	0	100	170
Earned media (any digital brand media not under the firms control such as reviews, user generated content, social listening, or unpaid social media, etc.)	11.23	13.83	9.15 - 13.31	10	0	95	170
Digital marketing spending outside of paid, owned, and earned media	10.38	18.29	7.63 – 13.13	5	0	100	170



Topic 4: Managing Digital Marketing Returns

What investments did your company make to improve the performance of your digital marketing activities over the last year?

	Number	Percent	95% CI
Optimizing our company website	169	75.1 %	± 5.7 %
Data analytics	150	66.7 %	± 6.2 %
Digital media and search	143	63.6 %	± 6.3 %
Marketing technology systems or platforms	133	59.1 %	± 6.5 %
Direct digital marketing (e.g., email)	119	52.9 %	± 6.6 %
Online experimentation and/or A/B testing	104	46.2 %	± 6.6 %
Managing privacy issues	58	25.8 %	± 5.8 %
Machine learning and automation	56	24.9 %	± 5.7 %
Improving our app	39	17.3 %	± 5.0 %
Total	971		

Number of Cases = 225

Number of Responses = 971

Average Number of Responses Per Case = 4.3

Number of Cases With At Least One Response = 225

Response Percent = 100.0 %



Topic 4: Managing Digital Marketing Returns

To what degree has the use of digital marketing contributed to your company's performance during the last year?

	Number	Percent	95% CI
1=Not at all	7	3.1 %	± 1.9 %
2	18	7.9 %	± 3.0 %
3	28	12.2 %	± 3.6 %
4	44	19.2 %	± 4.4 %
5	55	24.0 %	± 4.8 %
6	51	22.3 %	± 4.7 %
7=Very highly	26	11.4 %	± 3.5 %
Total	229	100.0 %	

Mean = 4.66

SD = 1.56

Missing Cases = 44

Response Percent = 83.9 %



Topic 4: Managing Digital Marketing Returns

Considering your company's digital marketing transformation, how would you rate your company's progress to date?

	Number	Percent	95% CI
Nascent: Early steps to design and visualize transformation	28	12.3 %	± 3.6 %
Emerging: Build non-integrated digital elements	136	59.6 %	± 6.0 %
Integrated: Fully integrate digital investments across company	48	21.1 %	± 4.6 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	16	7.0 %	± 2.8 %
Total	228	100.0 %	

Missing Cases = 45

Response Percent = 83.5 %



Topic 4: Managing Digital Marketing Returns

Where was your company on this digital marketing transformation journey last year at this time?

	Number	Percent	95% CI
Nascent: Early steps to design and visualize transformation	100	43.9 %	± 5.8 %
Emerging: Build non-integrated digital elements	90	39.5 %	± 5.6 %
Integrated: Fully integrate digital investments across company	27	11.8 %	± 3.6 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	11	4.8 %	± 2.4 %
Total	228	100.0 %	

Missing Cases = 45

Response Percent = 83.5 %



Topic 5: Social Media and Mobile Marketing

What percent of your marketing budget do you spend on mobile activities? Now, 12 months, 5 years

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing budget do you currently spend on mobile activities?	13.66	17.38	11.05 - 16.28	5	0	55.08	170
% What percent will you spend on mobile in the next 12 months?	16.88	21.19	13.69 - 20.08	10	0	100	169
What percent will you spend on mobile activities in five years?	24.61	23.57	21.04 - 28.17	15	0	74.22	168



Topic 5: Social Media and Mobile Marketing

To what degree has the use of mobile marketing contributed to your company's performance during the last year?

	Number	Percent	95% CI
1=Not at all	56	32.7 %	± 4.8 %
2	33	19.3 %	± 3.9 %
3	24	14.0 %	± 3.4 %
4	24	14.0 %	± 3.4 %
5	18	10.5 %	± 3.0 %
6	9	5.3 %	± 2.1 %
7=Very highly	7	4.1 %	± 1.9 %
Total	171	100.0 %	

Mean = 2.82

SD = 1.78

Missing Cases = 102

Response Percent = 62.6 %



Topic 5: Social Media and Mobile Marketing

What percent of your marketing budget do you spend on social media? Now, 12 months, 5 years

	Mean %	SD	95% CI	Median	Total
...of your marketing budget do you currently spend on social media?	14.48	13.65	12.44 - 16.51	10	173
...will you spend in the next 12 months?	16.78	14.63	14.58 - 18.97	10	171
...do you predict you will spend in five years?	21.33	16.00	18.93 - 23.74	20	170



Topic 5: Social Media and Mobile Marketing

What percent of your company's social media activities are currently performed by outside agencies?

Minimum = 0

Maximum = 93.2

Mean % = 24.7

Median = 2

Standard Deviation (Unbiased Estimate) = 33.8

95 Percent Confidence Interval Around the Mean = 19.6 - 29.7

Valid Cases = 172

Missing Cases = 101

Response Percent = 63.0%



Topic 5: Social Media and Mobile Marketing

To what degree has the use of social media contributed to your company's performance during the last year?

	Number	Percent	95% CI
1=Not at all	16	9.1 %	± 2.8 %
2	43	24.6 %	± 4.4 %
3	24	13.7 %	± 3.4 %
4	31	17.7 %	± 3.8 %
5	32	18.3 %	± 3.9 %
6	18	10.3 %	± 3.0 %
7=Very highly	11	6.3 %	± 2.4 %
Total	175	100.0 %	

Mean = 3.67

SD = 1.74

Missing Cases = 98

Response Percent = 64.1 %



Topic 6: Marketing Jobs

By what percent has the size of your marketing organization grown or shrunk over the last year?

Minimum = -75

Maximum = 100

Mean % = 15.09

Median = 5

Standard Deviation (Unbiased Estimate) = 31.40

95 Percent Confidence Interval Around the Mean = 10.41 - 19.77

Valid Cases = 173

Missing Cases = 100

Response Percent = 63.4%



Topic 6: Marketing Jobs

Compared to the number of marketing hires last year, by what percentage will your company's marketing hires change in the next year?

Minimum = -44.59

Maximum = 57.91

Mean % = 7.27

Median = 0

Standard Deviation (Unbiased Estimate) = 19.31

95 Percent Confidence Interval Around the Mean = 4.38 - 10.17

Valid Cases = 171

Missing Cases = 102

Response Percent = 62.6%



Topic 6: Marketing Jobs

What percent of your marketing organization is working from home?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
All the time	48.70	41.36	42.56 - 54.85	50	0	100	174
Some the time	57.49	42.50	51.14 - 63.84	75	0	100	172



Topic 6: Marketing Jobs

In your view, how has working from home influenced the following outcomes in your marketing organization?

Marketing employees are:

	Number	Percent	95% CI
Less productive	15	9.1 %	± 4.4 %
More productive	67	40.9 %	± 7.5 %
No change	82	50.0 %	± 7.7 %
Total	164	100.0 %	

Missing Cases = 2

Response Percent = 98.8 %



Topic 6: Marketing Jobs

In your view, how has working from home influenced the following outcomes in your marketing organization?

The culture of our marketing organization is:

	Number	Percent	95% CI
Weaker	57	34.5 %	± 7.3 %
Stronger	47	28.5 %	± 6.9 %
No change	61	37.0 %	± 7.4 %
Total	165	100.0 %	

Missing Cases = 1

Response Percent = 99.4 %



Topic 6: Marketing Jobs

In your view, how has working from home influenced the following outcomes in your marketing organization?

Our marketing organization is:

	Number	Percent	95% CI
More inclusive	73	44.8 %	± 7.6 %
Less inclusive	15	9.2 %	± 4.4 %
No change	75	46.0 %	± 7.7 %
Total	163	100.0 %	

Missing Cases = 3

Response Percent = 98.2 %



Topic 6: Marketing Jobs

In your view, how has working from home influenced the following outcomes in your marketing organization?

Our marketing organization is:

	Number	Percent	95% CI
More diverse	62	38.0 %	± 7.4 %
Less diverse	4	2.5 %	± 2.4 %
No change	97	59.5 %	± 7.6 %
Total	163	100.0 %	

Missing Cases = 3

Response Percent = 98.2 %



Topic 6: Marketing Jobs

In your view, how has working from home influenced the following outcomes in your marketing organization?

Younger marketers are being socialized:

	Number	Percent	95% CI
More	25	15.3 %	± 5.5 %
Less	73	44.8 %	± 7.6 %
No change	65	39.9 %	± 7.5 %
Total	163	100.0 %	

Missing Cases = 3

Response Percent = 98.2 %



Topic 7: Marketing Leadership

How has the role of marketing in your company changed during the last year?

	Number	Percent	95% CI
Increased in importance	130	59.6 %	± 6.0 %
Decreased in importance	21	9.6 %	± 3.2 %
No change	67	30.7 %	± 5.1 %
Total	218	100.0 %	

Missing Cases = 55

Response Percent = 79.9 %



Topic 7: Marketing Leadership

Thinking specifically about the relationship between the most senior marketing leader and other C-suite members, rate how likely the following activities are to occur in managing marketing budgets in your organization:

	Mean	1=Not at all	2	3	4	5	6	7=Very Likely	Total
The CFO works as a business partner with marketing leaders to build a business case for marketing spending.	4.38	23 10.6%	27 12.4%	24 11.0%	28 12.8%	40 18.3%	39 17.9%	37 17.0%	218 100.0%
Marketing meets one-on-one with other C-suite members to explain marketing's impact on the bottom line.	5.17	11 5.1%	5 2.3%	19 8.8%	28 12.9%	51 23.5%	45 20.7%	58 26.7%	217 100.0%
Marketing works with the Head of HR/People to improve employee acquisition	4.59	23 10.6%	15 6.9%	24 11.1%	26 12.0%	46 21.2%	43 19.8%	40 18.4%	217 100.0%
Marketing works with the Head of HR/People to improve employee training to represent the brand	4.03	25 11.5%	27 12.4%	30 13.8%	39 18.0%	48 22.1%	27 12.4%	21 9.7%	217 100.0%



Topic 7: Marketing Leadership

How often is the senior marketing leader asked by the CEO or CFO to participate in board meetings and the preparation for earnings calls?

	Mean	1=Never	2	3	4	5	6	7=All the time	Total
Board meetings	4.89	26 12.1%	19 8.9%	8 3.7%	26 12.1%	26 12.1%	38 17.8%	71 33.2%	214 100.0%
Preparation for earnings calls	3.97	58 29.9%	18 9.3%	12 6.2%	15 7.7%	14 7.2%	29 14.9%	48 24.7%	194 100.0%

**Topic 7: Marketing Leadership****Do you believe it is appropriate for your brand to take a stance on politically-charged issues?**

	Number	Percent	95% CI
Yes	64	30.2 %	± 5.1 %
No	148	69.8 %	± 6.0 %
Total	212	100.0 %	

Missing Cases = 61

Response Percent = 77.7 %

**Topic 7: Marketing Leadership****Will your company take actions related to the overturning of Roe vs. Wade?**

	Yes	No	Total
Private actions	53 25.5%	155 74.5%	208 100.0%
Public actions	18 8.7%	189 91.3%	207 100.0%



Topic 7: Marketing Leadership

Check all of the actions your company is likely to make in order to reduce the negative impact of its marketing-related activities on the ecological environment.

	Number	Percent	95% CI
Changing products and/or services	73	60.8 %	± 8.9 %
Changing marketing promotions	54	45.0 %	± 9.0 %
Changing partners	44	36.7 %	± 8.8 %
Changing distribution	38	31.7 %	± 8.4 %
Changing brand	23	19.2 %	± 7.1 %
Changing market selection	15	12.5 %	± 6.0 %
Total	247		

Number of Cases = 120

Number of Responses = 247

Average Number of Responses Per Case = 2.1

Number of Cases With At Least One Response = 120

Response Percent = 100.0 %



Topic 8: Marketing and Diversity, Equity, and Inclusion

By what percent has marketing spending on DE&I changed in the last year?

Minimum = -10

Maximum = 100

Mean % = 10.65

Median = 0

Standard Deviation (Unbiased Estimate) = 22.94

95 Percent Confidence Interval Around the Mean = 7.42 - 13.88

Valid Cases = 194

Missing Cases = 79

Response Percent = 71.1%



Topic 8: Marketing and Diversity, Equity, and Inclusion

How diverse is your marketing organization?

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
% Female	57.10	22.45	53.95 - 60.25	58.50	0	100	195
% Non-white	22.08	20.17	19.18 - 24.98	20	0	100	186
% Disabled	2.31	5.09	1.54 - 3.07	0	0	35	170



Topic 8: Marketing and Diversity, Equity, and Inclusion

How, if at all, have your company's DE&I marketing investments paid off in terms of the following outcomes:

	Mean	1=Not at all	2	3	4	5	6	7=A great deal	Total
Employee attraction	3.67	45 24.6%	11 6.0%	17 9.3%	41 22.4%	38 20.8%	17 9.3%	14 7.7%	183 100.0%
Employee retention	3.88	39 21.3%	9 4.9%	19 10.4%	42 23.0%	31 16.9%	28 15.3%	15 8.2%	183 100.0%
Customer acquisition	3.06	55 30.1%	20 10.9%	28 15.3%	37 20.2%	29 15.8%	10 5.5%	4 2.2%	183 100.0%
Customer retention	3.09	54 29.5%	20 10.9%	29 15.8%	40 21.9%	20 10.9%	15 8.2%	5 2.7%	183 100.0%
Sales growth	2.99	56 30.9%	23 12.7%	22 12.2%	47 26.0%	17 9.4%	12 6.6%	4 2.2%	181 100.0%
Stock market returns	2.05	96 57.5%	24 14.4%	9 5.4%	24 14.4%	8 4.8%	6 3.6%	0 0.0%	167 100.0%



Topic 9: Marketing Analytics

What percent of your marketing budget do you spend on marketing analytics?

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Do you currently spend on marketing analytics?	8.87	7.61	7.77 - 9.97	5	0	27.90	184
Will you spend on marketing analytics in the next three years?	14.45	9.77	13.01 - 15.89	10	0	37.17	177



Topic 9: Marketing Analytics

In what percent of projects does your company use available or requested marketing analytics before a decision is made?

Minimum = 0

Maximum = 100

Mean % = 48.85

Median = 50

Standard Deviation (Unbiased Estimate) = 32.47

95 Percent Confidence Interval Around the Mean = 44.08 - 53.62

Valid Cases = 178

Missing Cases = 95

Response Percent = 65.2%



Topic 9: Marketing Analytics

How is your company using marketing analytics to drive decision making? (Check all of the of the ways you are using marketing analytics):

	Number	Percent	95% CI
Digital marketing	159	83.2 %	± 5.3 %
Customer acquisition	137	71.7 %	± 6.4 %
Social media strategy	132	69.1 %	± 6.6 %
Customer insight	123	64.4 %	± 6.9 %
Segmentation	104	54.5 %	± 7.1 %
Branding strategy	101	52.9 %	± 7.1 %
Promotion strategy	99	51.8 %	± 7.2 %
Customer retention	96	50.3 %	± 7.2 %
Marketing mix analysis	93	48.7 %	± 7.2 %
Pricing strategy	81	42.4 %	± 7.1 %
Multichannel marketing	78	40.8 %	± 7.0 %
Sales strategy	74	38.7 %	± 7.0 %
Customer service	66	34.6 %	± 6.8 %
New product or service development	66	34.6 %	± 6.8 %
Product or service strategy	62	32.5 %	± 6.7 %
Total	1471		

Number of Cases = 191

Number of Responses = 1471

Average Number of Responses Per Case = 7.7

Number of Cases With At Least One Response = 191

Response Percent = 100.0 %



Topic 9: Marketing Analytics

To what degree has the use of marketing analytics contributed to your company's performance?

	Number	Percent	95% CI
1=Not at all	10	5.2 %	± 2.2 %
2	19	9.8 %	± 3.0 %
3	23	11.9 %	± 3.3 %
4	29	15.0 %	± 3.7 %
5	59	30.6 %	± 4.9 %
6	34	17.6 %	± 4.0 %
7=Very highly	19	9.8 %	± 3.0 %
Total	193	100.0 %	

Mean = 4.48

SD = 1.63

Missing Cases = 80

Response Percent = 70.7 %



Topic 9: Marketing Analytics

Which best describes how your company shows the short-term impact of marketing spend on your business?

	Number	Percent	95% CI
We prove the impact quantitatively	94	48.7 %	± 5.7 %
We have a good qualitative sense of the impact, but not a quantitative impact	74	38.3 %	± 5.3 %
We haven't been able to show the impact yet	25	13.0 %	± 3.5 %
Total	193	100.0 %	

Missing Cases = 80

Response Percent = 70.7 %



Topic 9: Marketing Analytics

Which best describes how your company shows the long-term impact of marketing spend on your business?

	Number	Percent	95% CI
We prove the impact quantitatively	89	46.4 %	± 5.6 %
We have a good qualitative sense of the impact, but not a quantitative impact	76	39.6 %	± 5.4 %
We haven't been able to show the impact yet	27	14.1 %	± 3.6 %
Total	192	100.0 %	

Missing Cases = 81

Response Percent = 70.3 %



Topic 9: Marketing Analytics

To what extent does your company have the right talent to fully leverage marketing analytics?

	Number	Percent	95% CI
1=Does not have the right talent	11	5.7 %	± 2.4 %
2	28	14.5 %	± 3.6 %
3	20	10.4 %	± 3.1 %
4	44	22.8 %	± 4.4 %
5	57	29.5 %	± 4.9 %
6	26	13.5 %	± 3.5 %
7=Has the right talent	7	3.6 %	± 1.9 %
Total	193	100.0 %	

Mean = 4.11

SD = 1.54

Missing Cases = 80

Response Percent = 70.7 %



Topic 9: Marketing Analytics

To what extent is your company using artificial intelligence or machine learning in optimizing and automating marketing efforts? (0% of the time to 100% of the time)

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Current	8.61	15.17	6.45 - 10.77	0	0	80	189
Next three years	22.88	22.48	19.62 - 26.14	17.50	0	100	183



Topic 9: Marketing Analytics

To what extent are blockchain technologies affecting your company's marketing strategies?

	Mean & SD	Not at all 1	2	3	4	5	6	Regularly 7	Total
Currently	1.35 1.03	160 84.7%	13 6.9%	5 2.6%	6 3.2%	1 0.5%	2 1.1%	2 1.1%	189 100.0%
Next three years	1.87 1.39	116 62.0%	27 14.4%	16 8.6%	15 8.0%	8 4.3%	3 1.6%	2 1.1%	187 100.0%



Topic 10: Marketing Knowledge Resources

Rate the quality of your company's marketing knowledge resources:

	Mean & SD	Poor 1	2	3	4	5	6	Excellent 7	Total
Marketing capabilities	4.95 1.11	2 1.1%	1 0.6%	11 6.3%	42 23.9%	66 37.5%	42 23.9%	12 6.8%	176 100.0%
Customer insights	4.67 1.51	2 1.1%	16 9.1%	24 13.6%	30 17.0%	48 27.3%	36 20.5%	20 11.4%	176 100.0%
Competitive intelligence	4.39 1.38	3 1.7%	15 8.6%	28 16.0%	39 22.3%	54 30.9%	27 15.4%	9 5.1%	175 100.0%
Marketing analytics	4.36 1.44	1 0.6%	22 12.6%	30 17.1%	32 18.3%	49 28.0%	32 18.3%	9 5.1%	175 100.0%
Marketing research	4.16 1.48	7 4.0%	18 10.2%	32 18.2%	44 25.0%	41 23.3%	25 14.2%	9 5.1%	176 100.0%
Marketing training	3.81 1.34	8 4.6%	22 12.6%	40 22.9%	51 29.1%	36 20.6%	16 9.1%	2 1.1%	175 100.0%



Topic 10: Marketing Knowledge Resources

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Marketing training	6.1	10.2	4.6 - 7.7	2	-26.5	39.9	161
Marketing research and intelligence	10.5	13.6	8.4 - 12.5	10	-25.9	46.4	162
Marketing consulting services	8.1	18.2	5.3 - 10.9	0	-40.4	56.9	162
Developing knowledge about how to do marketing	13.8	14.9	11.5 - 16.1	10	-23	52.8	163



Topic 10: Marketing Knowledge Resources

How has your market research changed during the pandemic?

	Number	Percent	95% CI
We are studying more online consumer behavior	81	63.3 %	± 8.5 %
We are doing more video interviews	74	57.8 %	± 8.7 %
We are using more text analysis	23	18.0 %	± 6.7 %
Total	178		

Number of Cases = 128

Number of Responses = 178

Average Number of Responses Per Case = 1.4

Number of Cases With At Least One Response = 128

Response Percent = 100.0 %



Topic 11: Marketing Performance

Compared to 2021, rate your company's performance during the prior 12 months: Sales revenue

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	7	4.4 %	4.4 %
-20%	7	4.4 %	8.8 %
-10%	8	5.0 %	13.8 %
-7%	0	0.0 %	13.8 %
-5%	2	1.3 %	15.0 %
-3%	3	1.9 %	16.9 %
-1%	2	1.3 %	18.1 %
No change	9	5.6 %	23.8 %
+1%	5	3.1 %	26.9 %
+3%	6	3.8 %	30.6 %
+5%	20	12.5 %	43.1 %
+7%	7	4.4 %	47.5 %
+10%	29	18.1 %	65.6 %
+20%	26	16.3 %	81.9 %
+30%	11	6.9 %	88.8 %
+40%	5	3.1 %	91.9 %
+50%	3	1.9 %	93.8 %
+75%	10	6.3 %	100.0 %
Total	160	100.0 %	100.0 %

Mean = 12.26%

SD = 22.68

Missing Cases = 113

Response Percent = 58.6 %



Topic 11: Marketing Performance

Compared to 2021, rate your company's performance during the prior 12 months: Profits

	Number	Percent	Cumulative
-75%	2	1.3 %	1.3 %
-50%	2	1.3 %	2.6 %
-40%	1	0.6 %	3.2 %
-30%	4	2.6 %	5.8 %
-20%	8	5.1 %	10.9 %
-10%	7	4.5 %	15.4 %
-7%	0	0.0 %	15.4 %
-5%	10	6.4 %	21.8 %
-3%	5	3.2 %	25.0 %
-1%	0	0.0 %	25.0 %
No change	15	9.6 %	34.6 %
+1%	3	1.9 %	36.5 %
+3%	10	6.4 %	42.9 %
+5%	15	9.6 %	52.6 %
+7%	4	2.6 %	55.1 %
+10%	29	18.6 %	73.7 %
+20%	18	11.5 %	85.3 %
+30%	10	6.4 %	91.7 %
+40%	5	3.2 %	94.9 %
+50%	3	1.9 %	96.8 %
+75%	5	3.2 %	100.0 %
Total	156	100.0 %	100.0 %

Mean = 7.09%

SD = 22.89

Missing Cases = 117

Response Percent = 57.1 %



Topic 11: Marketing Performance

Compared to 2021, rate your company's performance during the prior 12 months: Customer acquisition

	Number	Percent	Cumulative
-75%	1	0.7 %	0.7 %
-50%	0	0.0 %	0.7 %
-40%	1	0.7 %	1.3 %
-30%	0	0.0 %	1.3 %
-20%	4	2.6 %	3.9 %
-10%	5	3.3 %	7.2 %
-7%	1	0.7 %	7.9 %
-5%	2	1.3 %	9.2 %
-3%	2	1.3 %	10.5 %
-1%	3	2.0 %	12.5 %
No change	18	11.8 %	24.3 %
+1%	5	3.3 %	27.6 %
+3%	12	7.9 %	35.5 %
+5%	25	16.4 %	52.0 %
+7%	9	5.9 %	57.9 %
+10%	35	23.0 %	80.9 %
+20%	13	8.6 %	89.5 %
+30%	7	4.6 %	94.1 %
+40%	1	0.7 %	94.7 %
+50%	2	1.3 %	96.1 %
+75%	6	3.9 %	100.0 %
Total	152	100.0 %	100.0 %

Mean = 9.00%

SD = 18.85

Missing Cases = 121

Response Percent = 55.7 %



Topic 11: Marketing Performance

Compared to 2021, rate your company's performance during the prior 12 months: Customer retention

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	2	1.3 %	1.3 %
-20%	2	1.3 %	2.6 %
-10%	3	2.0 %	4.6 %
-7%	2	1.3 %	5.9 %
-5%	5	3.3 %	9.2 %
-3%	4	2.6 %	11.8 %
-1%	3	2.0 %	13.8 %
No change	51	33.6 %	47.4 %
+1%	9	5.9 %	53.3 %
+3%	7	4.6 %	57.9 %
+5%	10	6.6 %	64.5 %
+7%	1	0.7 %	65.1 %
+10%	24	15.8 %	80.9 %
+20%	4	2.6 %	83.6 %
+30%	2	1.3 %	84.9 %
+40%	3	2.0 %	86.8 %
+50%	8	5.3 %	92.1 %
+75%	12	7.9 %	100.0 %
Total	152	100.0 %	100.0 %

Mean = 11.20%

SD = 23.38

Missing Cases = 121

Response Percent = 55.7 %



Topic 11: Marketing Performance

Compared to 2021, rate your company's performance during the prior 12 months: Brand value

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	1	0.6 %	0.6 %
-40%	0	0.0 %	0.6 %
-30%	0	0.0 %	0.6 %
-20%	1	0.6 %	1.3 %
-10%	8	5.2 %	6.5 %
-7%	0	0.0 %	6.5 %
-5%	2	1.3 %	7.8 %
-3%	1	0.6 %	8.4 %
-1%	0	0.0 %	8.4 %
No change	41	26.6 %	35.1 %
+1%	4	2.6 %	37.7 %
+3%	6	3.9 %	41.6 %
+5%	20	13.0 %	54.5 %
+7%	1	0.6 %	55.2 %
+10%	31	20.1 %	75.3 %
+20%	19	12.3 %	87.7 %
+30%	9	5.8 %	93.5 %
+40%	4	2.6 %	96.1 %
+50%	1	0.6 %	96.8 %
+75%	5	3.2 %	100.0 %
Total	154	100.0 %	100.0 %

Mean = 9.81%

SD = 17.22

Missing Cases = 119

Response Percent = 56.4 %



Topic 11: Marketing Performance

Marketing investments work to influence customers in a variety of ways. Rate how durable the effects of your company's marketing investments are on customers.

The effect of marketing spending lasts:

	Number	Percent	Cumulative
An hour	0	0.0 %	0.0 %
12 hours	1	0.6 %	0.6 %
A day	5	3.0 %	3.6 %
A week	12	7.2 %	10.8 %
A month	27	16.2 %	26.9 %
Several months	47	28.1 %	55.1 %
Half a year	15	9.0 %	64.1 %
A year	33	19.8 %	83.8 %
Two years	19	11.4 %	95.2 %
5 years	4	2.4 %	97.6 %
7 years	1	0.6 %	98.2 %
10 years or more	3	1.8 %	100.0 %
Total	167	100.0 %	100.0 %

Missing Cases = 106

Response Percent = 61.2 %



Appendix: Company-level Descriptive Information

Which economic sector accounts for the majority of your company revenues?

	Number	Percent	95% CI
B2B - Product	115	42.3 %	± 5.9 %
B2B - Services	71	26.1 %	± 5.2 %
B2C - Product	53	19.5 %	± 4.7 %
B2C - Services	33	12.1 %	± 3.9 %
Total	272	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %



Appendix: Company-level Descriptive Information

Which industry sector best describes your company?

	Number	Percent	95% CI
Technology [Software/Platform]	55	20.2 %	± 4.8 %
Manufacturing	32	11.8 %	± 3.8 %
Professional Services/Consulting	30	11.0 %	± 3.7 %
Healthcare	29	10.7 %	± 3.7 %
Consumer Packaged Goods	27	9.9 %	± 3.6 %
Banking/Finance/Insurance	26	9.6 %	± 3.5 %
Retail	19	7.0 %	± 3.0 %
Energy	9	3.3 %	± 2.1 %
Transportation	8	2.9 %	± 2.0 %
Communications/Media	7	2.6 %	± 1.9 %
Pharmaceuticals/Biotech	6	2.2 %	± 1.8 %
Wholesale	6	2.2 %	± 1.8 %
Consumer Services	5	1.8 %	± 1.6 %
Mining/Construction	5	1.8 %	± 1.6 %
Real Estate	4	1.5 %	± 1.4 %
Education	4	1.5 %	± 1.4 %
Total	272	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %



Appendix: Company-level Descriptive Information

Number of Employees

	Number	Percent	95% CI
Fewer than 50	45	16.5 %	± 4.4 %
50- 99	23	8.5 %	± 3.3 %
100- 499	64	23.5 %	± 5.1 %
500- 999	30	11.0 %	± 3.7 %
1,000- 2,499	26	9.6 %	± 3.5 %
2,500- 4,999	14	5.1 %	± 2.6 %
5000- 9999	23	8.5 %	± 3.3 %
10,000+	47	17.3 %	± 4.5 %
Total	272	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %



Appendix: Company-level Descriptive Information

What was your company's sales revenue in last 12 months?

	Number	Percent	Cumulative
Less than \$10 million	44	16.5 %	16.5 %
\$10-25 million	30	11.3 %	27.8 %
\$26-99 million	37	13.9 %	41.7 %
\$100-499 million	60	22.6 %	64.3 %
\$500-999 million	16	6.0 %	70.3 %
\$1-2.5 billion	20	7.5 %	77.8 %
\$2.6-5 billion	21	7.9 %	85.7 %
\$5.1-9.9 billion	9	3.4 %	89.1 %
\$10-49 billion	20	7.5 %	96.6 %
<u>More than \$50+ billion</u>	<u>9</u>	<u>3.4 %</u>	<u>100.0 %</u>
Total	266	100.0 %	100.0 %

Missing Cases = 7

Response Percent = 97.4 %



Appendix: Company-level Descriptive Information

What % of your company's sales is through the Internet? - Average scores

Minimum = 0

Maximum = 72.66

Mean = 14.79

Median = 5

Standard Deviation (Unbiased Estimate) = 22.74

95 Percent Confidence Interval Around the Mean = 12.03 - 17.55

Valid Cases = 261

Missing Cases = 12

Response Percent = 95.6%

What % of your company's sales is through the Internet? - Categorized into historic groups

	Number	Percent	95% CI
0%	99	37.9 %	± 5.7 %
1-10%	78	29.9 %	± 5.4 %
11-49%	47	18.0 %	± 4.5 %
50-99%	20	7.7 %	± 3.1 %
100%	17	6.5 %	± 2.9 %
Total	261	100.0 %	

Missing Cases = 12

Response Percent = 95.6 %