

The **CMO** Survey[®]

Managing AI, Digital Strategies, and DE&I in Marketing

Topline Report

Fall 2023

Deloitte.



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Managing AI, Digital Strategies and Spending, and DE&I in Marketing

The 31th Edition of The CMO Survey, Fall 2023

Survey Sample

3075 marketing leaders at U.S. for-profit companies; 316 responded for a 10.3% response rate—95.6% of respondents are VP-level or above.

Survey Administration

The survey was in field from July 26-August 17. It was administered via email with follow-up reminders.

Survey Reports

- [The Topline Report](#) offers an aggregate view of survey results.
- [The Highlights and Insights Report](#) shares key survey metrics, trends, and insights over time.
- [The 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 marketing leaders in order to predict the future of markets, track marketing excellence, and improve the value of marketing in organizations and society.

Administration: Founded in 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.

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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	142	49.0 %	± 5.5 %
2=No Change	82	28.3 %	± 4.9 %
1=Less	66	22.8 %	± 4.5 %
Total	290	100.0 %	

Mean = 2.26

SD = 0.81

Missing Cases = 27

Response Percent = 91.5 %



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 = 30.71

Maximum = 100

Mean = 66.65

Median = 70

Standard Deviation (Unbiased Estimate) = 15.75

95 Percent Confidence Interval Around the Mean = 64.84 - 68.47

Valid Cases = 290

Missing Cases = 27

Response Percent = 91.5%


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	49	17.0 %	± 4.0 %
Yes, inflationary pressures are decreasing marketing spending levels	130	45.1 %	± 5.4 %
No	109	37.8 %	± 5.3 %
Total	288	100.0 %	

Missing Cases = 29

Response Percent = 90.9 %

 **Topic 2: Monitoring Partners and Competitors**

Will you use a channel or go directly to market?

	Number	Percent	95% CI
Uses channel partners	174	54.9 %	± 5.5 %
Does not use channel partners	143	45.1 %	± 5.5 %
Total	317	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %


Topic 2: Monitoring Partners and Competitors
Do you expect the following channel partner outcomes for your company to increase, decrease, or have no change in the next 12 months?

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Partner will buy related products/services from my company	0.41 0.60	66 47.1%	66 47.1%	8 5.7%	140 100.0%
Partner's price per unit	0.31 0.70	63 45.0%	58 41.4%	19 13.6%	140 100.0%
Partner's purchase volume	0.28 0.81	70 50.4%	38 27.3%	31 22.3%	139 100.0%
Partner's level of power in our relationship	0.12 0.59	33 23.7%	89 64.0%	17 12.2%	139 100.0%


Topic 2: Monitoring Partners and Competitors
Focusing on this market, do you expect the following competitor activities for your company to increase, decrease, or have no change in the next 12 months?

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Emergence of new domestic competitors	0.30 0.65	116 40.1%	143 49.5%	30 10.4%	289 100.0%
Emergence of new global competitors	0.26 0.56	92 31.9%	179 62.2%	17 5.9%	288 100.0%
Intense rivalry for customers	0.66 0.50	194 67.8%	88 30.8%	4 1.4%	286 100.0%
Competitor innovation	0.55 0.57	170 59.2%	106 36.9%	11 3.8%	287 100.0%
Competitor price-cutting	0.40 0.69	148 52.1%	103 36.3%	33 11.6%	284 100.0%
Cooperation on non-price strategies	0.10 0.48	47 16.5%	217 76.4%	20 7.0%	284 100.0%



Topic 3: Marketing Spending

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

Minimum = 0.00

Maximum = 38.85

Mean = 10.62

Median = 5

Standard Deviation (Unbiased Estimate) = 11.28

95 Percent Confidence Interval Around the Mean = 8.92 - 12.32

Valid Cases = 169

Missing Cases = 148

Response Percent = 53.3%



Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 39.85

Mean = 9.16

Median = 4

Standard Deviation (Unbiased Estimate) = 11.62

95 Percent Confidence Interval Around the Mean = 7.41 - 10.90

Valid Cases = 170

Missing Cases = 147

Response Percent = 53.6%



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	2.57	16.93	0.14 - 5.00	0	-41.27	47.45	187
Digital marketing spending	7.94	22.98	4.62 - 11.25	5	-100	100	185



Topic 3: Marketing Spending

Relative to the prior 12 months, by what percent do you expect your marketing budget to change in the next 12 months in each area. Be sure to report the level and direction of the change (e.g., -5%, 0%, 10%).

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	9.87	12.73	7.97 - 11.77	5	-23.41	45.25	173
Overall marketing spending	7.20	12.33	5.39 - 9.00	5	-23.19	38.60	179
Customer relationship management	6.15	8.03	4.91 - 7.39	5	-10	25.58	160
Brand building	5.52	9.99	4.01 - 7.04	4	-21.42	32.77	167
New product introductions	5.49	8.38	4.21 - 6.78	1	-15.53	26.99	163
Customer experience spending	4.98	7.37	3.83 - 6.13	1	-10	27.47	158
New service introductions	3.72	6.61	2.69 - 4.76	0	-12.77	20.48	156
Traditional advertising spending	-0.55	8.55	-1.87 - 0.76	0	-27.19	24.29	162


Topic 3: Marketing Spending
What expenses are included in your company's marketing budget? (Check all that apply)

	Number	Percent	95% CI
Direct expenses of marketing activities	183	92.0 %	± 3.8 %
Brand-related expenses	179	89.9 %	± 4.2 %
Social media marketing	174	87.4 %	± 4.6 %
Marketing employees	162	81.4 %	± 5.5 %
Marketing analytics	153	76.9 %	± 5.9 %
Marketing technologies	153	76.9 %	± 5.9 %
Marketing research	138	69.3 %	± 6.5 %
Other overhead costs associated with marketing	127	63.8 %	± 6.7 %
Mobile marketing	115	57.8 %	± 6.9 %
Customer experience expenses	109	54.8 %	± 7.0 %
Marketing training	101	50.8 %	± 7.0 %
Sales support tools	75	37.7 %	± 6.8 %
Sales employees	28	14.1 %	± 4.9 %
Total	1697		

Number of Cases = 199

Number of Responses = 1697

Average Number of Responses per Case = 8.5

Number of Cases With at Least One Response = 199

Response Percent = 100.0 %



Topic 4: Managing AI in Marketing

How many years have you been using AI in marketing?

	Number	Percent	95% CI
Less than 1 year	165	60.4 %	± 5.5 %
1 year	49	17.9 %	± 4.0 %
2-3 years	43	15.8 %	± 3.8 %
4-5 years	8	2.9 %	± 1.7 %
5+ years	8	2.9 %	± 1.7 %
Total	273	100.0 %	

Missing Cases = 44

Response Percent = 86.1 %


Topic 4: Managing AI in Marketing
How is your company using AI in its marketing activities? (Check all that apply)

	Number	Percent	95% CI
Content personalization	130	52.8 %	± 6.3 %
Content creation	121	49.2 %	± 6.3 %
Improving marketing ROI by optimizing marketing content and timing	90	36.6 %	± 6.1 %
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	86	35.0 %	± 6.0 %
Predictive analytics for customer insights	81	32.9 %	± 5.9 %
Targeting decisions	78	31.7 %	± 5.9 %
Marketing automation: AI-powered automation tools streamline marketing processes	69	28.0 %	± 5.7 %
Conversational AI for customer service (i.e., chatbots, virtual assistants)	65	26.4 %	± 5.6 %
Data analysis and reporting: To measure performance, track metrics, and generate reports	61	24.8 %	± 5.4 %
Customer segmentation	53	21.5 %	± 5.2 %
Listening and sentiment analysis	35	14.2 %	± 4.4 %
Augmented and virtual reality	25	10.2 %	± 3.8 %
Next best offer	12	4.9 %	± 2.7 %
Voice search optimization	9	3.7 %	± 2.4 %
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	7	2.8 %	± 2.1 %
Facial recognition and visual search: Image and video recognition	5	2.0 %	± 1.8 %
Biometrics also known as chipping (i.e., body or hand implants)	4	1.6 %	± 1.6 %
Total	931		

Number of Cases = 246

Number of Responses = 931

Average Number of Responses per Case = 3.8

Number of Cases With at Least One Response = 246

Response Percent = 100.0 %


Topic 4: Managing AI in Marketing
How is your company using AI to create content? (Check all that apply)

	Number	Percent	95% CI
Blogs	77	64.7 %	± 8.7 %
Website content other than blogs	74	62.2 %	± 8.8 %
Social media	65	54.6 %	± 9.1 %
Email copy	65	54.6 %	± 9.1 %
Ad copy	49	41.2 %	± 9.0 %
Product or service descriptions	47	39.5 %	± 8.9 %
Sales copy	41	34.5 %	± 8.7 %
News stories	31	26.1 %	± 8.0 %
Customer service content	23	19.3 %	± 7.2 %
Ad design	16	13.4 %	± 6.2 %
Technical copy	13	10.9 %	± 5.7 %
Logo design	6	5.0 %	± 4.0 %
Packaging copy	4	3.4 %	± 3.3 %
Logo copy	3	2.5 %	± 2.9 %
Augmented reality	3	2.5 %	± 2.9 %
Virtual reality	2	1.7 %	± 2.3 %
Packaging design	1	0.8 %	± 1.7 %
Game design	0	0.0 %	± 0.0 %
Total	520		

Number of Cases = 119

Number of Responses = 520

Average Number of Responses per Case = 4.4

Number of Cases With at Least One Response = 119

Response Percent = 100.0 %



Topic 4: Managing AI in Marketing

Rate how the use of AI in marketing has affected the following outcomes. In each case, note the percentage improvement experienced in your company:

	Mean %	SD	95% CI	Median	Minimum	Maximum	Total
Sales productivity	6.15	11.21	4.68 - 7.62	0	0	75	223
Marketing overhead costs	7.21	9.79	5.93 - 8.50	5	0	60	224
Customer satisfaction	6.97	13.22	5.22 - 8.71	0	0	80	220


Topic 5: Digital Marketing Strategies and Spending
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	24	8.8 %	± 2.9 %
Emerging: Build non-integrated digital elements	148	54.2 %	± 5.5 %
Integrated: Fully integrate digital investments across company	66	24.2 %	± 4.5 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	35	12.8 %	± 3.5 %
Total	273	100.0 %	

Missing Cases = 44

Response Percent = 86.1 %


Topic 5: Digital Marketing Strategies and Spending
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	74	27.1 %	± 4.7 %
Emerging: Build non-integrated digital elements	142	52.0 %	± 5.5 %
Integrated: Fully integrate digital investments across company	38	13.9 %	± 3.6 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	19	7.0 %	± 2.6 %
Total	273	100.0 %	

Missing Cases = 44

Response Percent = 86.1 %



Topic 5: Digital Marketing Strategies and Spending

What percent of your company's digital marketing transformation is led by a senior marketing leader versus leaders in other functions in your company?

Minimum = 0

Maximum = 100

Mean = 69.84

Median = 80

Standard Deviation (Unbiased Estimate) = 31.36

95 Percent Confidence Interval Around the Mean = 66.11 - 73.57

Valid Cases = 272

Missing Cases = 45

Response Percent = 85.8%



Topic 5: Digital Marketing Strategies and Spending

In what percent of the time do you perform experiments to understand the impact of your marketing actions on customers?

Minimum = 0

Maximum = 100

Mean = 35.56

Median = 26

Standard Deviation (Unbiased Estimate) = 26.68

95 Percent Confidence Interval Around the Mean = 31.71 - 39.41

Valid Cases = 184

Missing Cases = 133

Response Percent = 58.0%

 **Topic 5: Digital Marketing Strategies and Spending**

What percentage of your marketing budget involves the use of any type of influencer strategy?

	Mean	SD	95% CI	Median	Total
Currently	5.86	8.49	4.78 - 6.94	2	237
One year ago	4.95	8.64	3.85 - 6.05	0	236
3 years from now	12.24	14.12	10.43 - 14.04	10	236



Topic 5: Digital Marketing Strategies and Spending

Considering online influencer activities, allocate 100 points across these activities according to their importance to your marketing strategy:

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
LinkedIn	24.68	25.57	21.05 - 28.31	20	0	100	191
Blogging on your company site	16.73	21.71	13.65 - 19.81	10	0	100	191
Instagram	15.10	18.80	12.44 - 17.77	5	0	85	191
Facebook	11.27	15.55	9.07 - 13.48	5	0	100	191
YouTube	10.11	12.35	8.36 - 11.86	5	0	50	191
Blogging on other sites	7.36	13.90	5.38 - 9.33	0	0	80	191
TikTok	5.61	12.16	3.88 - 7.33	0	0	70	191
Other	4.74	15.42	2.55 - 6.93	0	0	100	191
Twitter	3.75	6.90	2.77 - 4.73	0	0	30	191
Snapchat	.064	2.65	.27 - 1.02	0	0	30	191

 **Topic 5: Digital Marketing Strategies and Spending**

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

	Number	Percent	95% CI
1=Not at all	104	44.3 %	± 5.2 %
2	47	20.0 %	± 3.9 %
3	27	11.5 %	± 3.1 %
4	22	9.4 %	± 2.8 %
5	25	10.6 %	± 3.0 %
6	7	3.0 %	± 1.6 %
7=Very Highly	3	1.3 %	± 1.1 %
Total	235	100.0 %	

Mean = 2.36

SD = 1.60

Missing Cases = 82

Response Percent = 74.1 %

 **Topic 5: Digital Marketing Strategies and Spending**

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?	15.67	19.26	13.14 - 18.21	10	0	59.14	222
What percent will you spend on mobile in the next 12 months?	19.07	22.45	16.10 - 22.05	10	0	90	219
What percent will you spend on mobile activities in five years?	26.93	25.17	23.59 - 30.27	20	0	79.20	218

 **Topic 5: Digital Marketing Strategies and Spending**

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	71	31.1 %	± 4.6 %
2	45	19.7 %	± 3.9 %
3	32	14.0 %	± 3.3 %
4	29	12.7 %	± 3.2 %
5	31	13.6 %	± 3.3 %
6	13	5.7 %	± 2.2 %
7=Very highly	7	3.1 %	± 1.6 %
Total	228	100.0 %	

Mean = 2.87

SD = 1.77

Missing Cases = 89

Response Percent = 71.9 %



Topic 5: Digital Marketing Strategies and Spending

Which of the following factors limit the success of your company's mobile marketing activities? (Check all that apply)

	Number	Percent	95% CI
Difficulty tracking the customer across the journey	82	40.0 %	± 6.8 %
Weak link between our mobile strategy and our broader marketing strategy	78	38.0 %	± 6.7 %
Insufficient in-house mobile expertise	75	36.6 %	± 6.7 %
Unclear objectives for our mobile marketing strategy	65	31.7 %	± 6.4 %
Difficulty identifying our mobile customer audience	63	30.7 %	± 6.4 %
Our content is not sufficiently personalized	63	30.7 %	± 6.4 %
Undisciplined approach to monitoring mobile metrics	48	23.4 %	± 5.8 %
Our content is not as engaging as it needs to be	33	16.1 %	± 5.1 %
Unclear ownership of mobile initiatives within the company	32	15.6 %	± 5.0 %
Lack of a mobile-friendly website	17	8.3 %	± 3.8 %
Total	556		

Number of Cases = 205

Number of Responses = 556

Average Number of Responses per Case = 2.7

Number of Cases With at Least One Response = 205

Response Percent = 100.0 %

 **Topic 5: Digital Marketing Strategies and Spending****Does your company use an app?**

	Number	Percent	95% CI
Yes	85	35.9 %	± 4.9 %
No	152	64.1 %	± 5.5 %
Total	237	100.0 %	

Missing Cases = 80

Response Percent = 74.8 %

 **Topic 5: Digital Marketing Strategies and Spending**

Approximately what percent of revenue has your app(s) generated for your business?

	Number	Percent	95% CI
No revenue [0%]	23	27.1 %	± 9.6 %
Little revenue [< 5%]	23	27.1 %	± 9.6 %
Some revenue [5 - 10%]	12	14.1 %	± 7.6 %
Moderate revenue [10 - 15%]	13	15.3 %	± 7.8 %
<u>High revenue [15%+]</u>	<u>14</u>	<u>16.5 %</u>	<u>± 8.1 %</u>
Total	85	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

 **Topic 5: Digital Marketing Strategies and Spending**

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

	Mean	SD	95% CI	Median	Total
What percent of your marketing budget do you currently spend on social media?	15.96	13.62	14.18 - 17.73	10	227
What percent will you spend on social media in the next 12 months?	18.90	14.97	16.96 - 20.85	15	228
What percent will you spend on social media in the next five years?	24.31	16.78	22.12 - 26.50	20	225

 **Topic 5: Digital Marketing Strategies and Spending**

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

	Number	Percent	95% CI
1=Not At All	24	10.3 %	± 2.9 %
2	44	18.8 %	± 3.8 %
3	35	15.0 %	± 3.5 %
4	46	19.7 %	± 3.9 %
5	53	22.6 %	± 4.1 %
6	26	11.1 %	± 3.0 %
7=Very Highly	6	2.6 %	± 1.5 %
Total	234	100.0 %	

Mean = 3.69

SD = 1.63

Missing Cases = 83

Response Percent = 73.8 %



Topic 6: Diversity, Equity, and Inclusion in Marketing

What percent of your marketing budget to you spend on DE&I?

Minimum = 0

Maximum = 65

Mean = 2.50

Median = 0

Standard Deviation (Unbiased Estimate) = 5.98

95 Percent Confidence Interval Around the Mean = 1.69 - 3.32

Valid Cases = 208

Missing Cases = 109

Response Percent = 65.6%



Topic 6: Diversity, Equity, and Inclusion in Marketing

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

Minimum = -10

Maximum = 100

Mean = 2.27

Median = 0

Standard Deviation (Unbiased Estimate) = 10.51

95 Percent Confidence Interval Around the Mean = 0.85 - 3.70

Valid Cases = 208

Missing Cases = 109

Response Percent = 65.6%



Topic 6: Diversity, Equity, and Inclusion in Marketing

Do you expect DE&I to be a marketing priority for your company over the next five years?

	Number	Percent	95% CI
Yes	89	41.4 %	± 5.0 %
No	126	58.6 %	± 5.4 %
Total	215	100.0 %	

Missing Cases = 102

Response Percent = 67.8 %



Topic 6: Diversity, Equity, and Inclusion in Marketing

How much is your company changing its marketing strategy to reach a more diverse set of customers?

	Number	Percent	95% CI
1=Not at all	43	19.9 %	± 3.8 %
2	39	18.1 %	± 3.6 %
3	37	17.1 %	± 3.6 %
4	37	17.1 %	± 3.6 %
5	36	16.7 %	± 3.5 %
6	17	7.9 %	± 2.5 %
Very much	7	3.2 %	± 1.6 %
Total	216	100.0 %	

Mean = 3.29

SD = 1.72

Missing Cases = 101

Response Percent = 68.1 %



Topic 6: Diversity, Equity, and Inclusion in Marketing

Rate the degree to which your company has developed an inclusive approach to marketing decision making, meaning you have established steps to review and/or evaluate marketing decisions from a DE&I perspective.

	Number	Percent	95% CI
1=Not at all	56	26.3 %	± 4.2 %
2	31	14.6 %	± 3.3 %
3	23	10.8 %	± 2.9 %
4	38	17.8 %	± 3.6 %
5	28	13.1 %	± 3.1 %
6	26	12.2 %	± 3.0 %
7=Very Highly	11	5.2 %	± 2.0 %
Total	213	100.0 %	

Mean = 3.34

SD = 1.93

Missing Cases = 104

Response Percent = 67.2 %


Topic 6: Diversity, Equity, and Inclusion in Marketing
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	3.47	56 29.8%	18 9.6%	17 9.0%	23 12.2%	39 20.7%	23 12.2%	12 6.4%	188 100.0%
Employee retention	3.53	52 27.8%	17 9.1%	19 10.2%	23 12.3%	42 22.5%	22 11.8%	12 6.4%	187 100.0%
Customer acquisition	2.80	63 34.1%	28 15.1%	30 16.2%	30 16.2%	19 10.3%	11 5.9%	4 2.2%	185 100.0%
Customer retention	2.67	68 36.6%	28 15.1%	27 14.5%	36 19.4%	17 9.1%	8 4.3%	2 1.1%	186 100.0%
Sales growth	2.53	73 39.9%	32 17.5%	21 11.5%	32 17.5%	17 9.3%	6 3.3%	2 1.1%	183 100.0%
Stock market returns	1.79	112 63.3%	24 13.6%	17 9.6%	16 9.0%	6 3.4%	2 1.1%	0 0.0%	177 100.0%



Topic 6: Diversity, Equity, and Inclusion in Marketing

How diverse is your marketing organization?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
%Female	59.08	20.93	56.15 - 62.00	60	0	100	197
%Non-white	19.81	18.35	17.17 - 22.45	16	0	90	186
%Disabled	2.17	3.94	1.58 - 2.77	0	0	20	169


Topic 7: Marketing Leadership
How well aligned are marketing and sales leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1=Not at all	3	1.3 %	± 1.1 %
2	5	2.2 %	± 1.4 %
3	11	4.8 %	± 2.0 %
4	22	9.7 %	± 2.8 %
5	65	28.6 %	± 4.5 %
6	71	31.3 %	± 4.6 %
7=Very Highly	50	22.0 %	± 4.0 %
Total	227	100.0 %	

Mean = 5.44

SD = 1.31

Missing Cases = 90

Response Percent = 71.6 %



Topic 7: Marketing Leadership

How well aligned are marketing and finance leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1=Not at all	3	1.3 %	± 1.1 %
2	15	6.6 %	± 2.4 %
3	13	5.8 %	± 2.2 %
4	38	16.8 %	± 3.6 %
5	69	30.5 %	± 4.6 %
6	48	21.2 %	± 4.0 %
7=Very Highly	40	17.7 %	± 3.7 %
Total	226	100.0 %	

Mean = 5.03

SD = 1.46

Missing Cases = 91

Response Percent = 71.3 %

 **Topic 7: Marketing Leadership**

How many years has your company's senior marketing leader served in this role?

	<u>Median</u>	<u>Mean</u>	<u>SD</u>	<u>Minimum</u>	<u>Maximum</u>	<u>Total</u>
Years	4	5.17	4.22	1	17.78	225



Topic 7: Marketing Leadership

How many direct and indirect reports (dotted-line) does your senior marketing leader have?

	Median	Mean	SD	Minimum	Maximum	Range	Total
How many direct reports do you have?	5	7.15	10.57	0	67.88	67.88	223
How many indirect reports (dotted-line) reports do you have?	7	38.49	108.59	0	746.42	746.42	195

 **Topic 7: Marketing Leadership**

How well is the role of the senior marketing leader defined in your company?

	Number	Percent	95% CI
Ambiguous	23	10.1 %	± 2.9 %
Reasonably defined	108	47.6 %	± 5.3 %
Very clear	96	42.3 %	± 5.1 %
Total	227	100.0 %	

Missing Cases = 90

Response Percent = 71.6 %


Topic 7: Marketing Leadership
How often are you/your senior marketing leader asked by the CEO or CFO to participate in board meetings and earnings calls?

	Mean & SD	1=Never	2	3	4	5	6	7=All the time	Total
Board meetings	4.65 2.23	30 13.6%	26 11.8%	9 4.1%	39 17.6%	19 8.6%	19 8.6%	79 35.7%	221 100.0%
Preparation for earnings calls	3.71 2.49	75 35.7%	18 8.6%	9 4.3%	21 10.0%	17 8.1%	18 8.6%	52 24.8%	210 100.0%


Topic 7: Marketing Leadership
Which of the following marketing leadership activities does your senior marketing leader find challenging to implement on a regular basis? (Check all that are challenging)

	Number	Percent	95% CI
Demonstrating the impact of marketing actions on financial outcomes	131	61.2 %	± 6.6 %
Communicating the role of the brand in business decisions	97	45.3 %	± 6.7 %
Focusing data and analytics on the most important marketing problems	89	41.6 %	± 6.7 %
Securing cross-functional support for new marketing investments	87	40.7 %	± 6.6 %
Leveraging technology to improve customer value	79	36.9 %	± 6.5 %
Infusing customer's point of view in business decisions	60	28.0 %	± 6.1 %
Linking marketing investments to important business objectives	56	26.2 %	± 5.9 %
Using business terminology that resonates outside of the marketing function	33	15.4 %	± 4.9 %
Total	632		

Number of Cases = 214

Number of Responses = 632

Average Number of Responses per Case = 3.0

Number of Cases With at Least One Response = 214

Response Percent = 100.0 %



Topic 7: Marketing Leadership

Rate whether marketing feels increasing pressure from the following leaders to prove the value of marketing.

	Yes	No	Total
CEO	113 51.1%	108 48.9%	221 100.0%
Board	71 32.9%	145 67.1%	216 100.0%
CFO	114 51.8%	106 48.2%	220 100.0%


Topic 7: Marketing Leadership
Has your brand taken public action for or against any of the following social issues?

	Number	Percent	95% CI
LGBTQ+ equality	82	59.0 %	± 8.3 %
Covid-19 safeguards (e.g., masks, social distancing)	81	58.3 %	± 8.3 %
Racial equality	74	53.2 %	± 8.4 %
Gender equality	69	49.6 %	± 8.4 %
Climate-related issues	59	42.4 %	± 8.3 %
Economic equality	33	23.7 %	± 7.2 %
Education	32	23.0 %	± 7.1 %
Healthcare	23	16.5 %	± 6.3 %
Abortion	8	5.8 %	± 3.9 %
Immigration	7	5.0 %	± 3.7 %
Firearms	5	3.6 %	± 3.1 %
Total	473		

Number of Cases = 139

Number of Responses = 473

Average Number of Responses per Case = 3.4

Number of Cases With at Least One Response = 139

Response Percent = 100.0 %


Topic 8: Marketing Organization
Where is marketing located in your firm?

	Number	Percent	95% CI
Corporate	176	86.7 %	± 4.7 %
Business unit level	58	28.6 %	± 6.3 %
Brand or product level	28	13.8 %	± 4.8 %
Field offices	16	7.9 %	± 3.7 %
Total	278		

Number of Cases = 203

Number of Responses = 278

Average Number of Responses per Case = 1.4

Number of Cases With at Least One Response = 203

Response Percent = 100.0 %


Topic 8: Marketing Organization
Select the description that best captures the role of sales within your firm.

	Number	Percent	95% CI
Sales is in charge of marketing	13	6.5 %	± 2.2 %
Sales is within the marketing function	12	6.0 %	± 2.1 %
Sales and marketing work together on an equal level	153	76.5 %	± 5.5 %
We don't have a sales function	22	11.0 %	± 2.8 %
<u>We have a sales function, but not a marketing function</u>	0	0.0 %	± 0.0 %
Total	200	100.0 %	

Missing Cases = 117

Response Percent = 63.1 %



Topic 8: Marketing Organization

Companies are generally organized by product/service groups or by customer groups. Which organizational structure is most common in your company?


	Number	Percent	95% CI
Product/service groups	157	78.9 %	± 5.5 %
Customer groups	42	21.1 %	± 3.8 %
Total	199	100.0 %	

Missing Cases = 118

Response Percent = 62.8 %


Topic 8: Marketing Organization
Rate the extent to which your company engages in the following customer information behaviors.
Information about customers...

	Mean & SD	Not at all 1	2	3	4	5	6	All the time 7	Total
Is collected on a regular basis	5.10 1.71	4 2.0%	16 8.2%	19 9.7%	27 13.8%	37 18.9%	37 18.9%	56 28.6%	196 100.0%
Is shared vertically across different levels of the firm and business units	4.69 1.79	12 6.1%	15 7.7%	22 11.2%	34 17.3%	44 22.4%	27 13.8%	42 21.4%	196 100.0%
Is shared horizontally across different functions and business units	4.73 1.72	10 5.2%	13 6.7%	23 11.9%	33 17.0%	48 24.7%	29 14.9%	38 19.6%	194 100.0%
Shapes the design of firm strategies	4.80 1.67	7 3.6%	16 8.2%	23 11.9%	26 13.4%	46 23.7%	43 22.2%	33 17.0%	194 100.0%
Influences the implementation of firm strategies	4.99 1.58	5 2.6%	12 6.2%	20 10.3%	25 12.9%	45 23.2%	54 27.8%	33 17.0%	194 100.0%
Impacts the evaluation of firm strategies	4.97 1.60	5 2.6%	16 8.3%	16 8.3%	25 13.0%	40 20.7%	62 32.1%	29 15.0%	193 100.0%



Topic 9: Marketing Jobs

How many employees/marketing employees are in your company?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Number of employees	7533	22022	4603 - 10463	625	1	201629	217
Number of marketing employees	112	338	67 - 157	17	0	1986	216



Topic 9: Marketing Jobs

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

Minimum = -50

Maximum = 100

Mean = 5.48

Median = 0.50

Standard Deviation (Unbiased Estimate) = 22.14

95 Percent Confidence Interval Around the Mean = 2.53 - 8.43

Valid Cases = 217

Missing Cases = 100

Response Percent = 68.5%



Topic 9: 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 = -26.81

Maximum = 39.18

Mean = 5.30

Median = 0


Standard Deviation (Unbiased Estimate) = 11.41

95 Percent Confidence Interval Around the Mean = 3.78 - 6.82

Valid Cases = 216

Missing Cases = 101

Response Percent = 68.1%


Topic 9: Marketing Jobs
Thinking about future marketing talent needs, what skills would you now prioritize in the hiring process? (Rank in order of importance, where 1=most important)

	Mean & SD	1=Most important	2	3	4	5	6	7	8	9=Least important	Total
Ability to pivot as new priorities emerge	3.14 2.00	44 20.7%	47 22.1%	32 15.0%	17 8.0%	20 9.4%	11 5.2%	10 4.7%	4 1.9%	2 0.9%	187 87.8%
Creativity and innovation skills	3.40 2.12	46 21.6%	28 13.1%	35 16.4%	19 8.9%	23 10.8%	16 7.5%	9 4.2%	4 1.9%	4 1.9%	184 86.4%
Navigating ambiguity	4.27 2.42	19 8.9%	34 16.0%	26 12.2%	20 9.4%	19 8.9%	18 8.5%	12 5.6%	13 6.1%	11 5.2%	172 80.8%
Emotional intelligence	4.38 2.13	14 6.6%	21 9.9%	25 11.7%	30 14.1%	23 10.8%	20 9.4%	12 5.6%	13 6.1%	4 1.9%	162 76.1%
Curiosity	4.39 2.41	26 12.2%	15 7.0%	21 9.9%	27 12.7%	19 8.9%	20 9.4%	13 6.1%	11 5.2%	10 4.7%	162 76.1%
Natural leadership abilities	4.75 2.61	21 9.9%	16 7.5%	26 12.2%	18 8.5%	11 5.2%	17 8.0%	14 6.6%	22 10.3%	13 6.1%	158 74.2%
MarTech platform experience	4.84 2.91	24 11.3%	22 10.3%	22 10.3%	18 8.5%	10 4.7%	10 4.7%	12 5.6%	12 5.6%	32 15.0%	162 76.1%
Data science background	5.33 2.70	15 7.0%	19 8.9%	13 6.1%	14 6.6%	19 8.9%	13 6.1%	16 7.5%	21 9.9%	25 11.7%	155 72.8%
Financial acumen	5.80 2.30	4 1.9%	11 5.2%	13 6.1%	15 7.0%	14 6.6%	17 8.0%	25 11.7%	22 10.3%	17 8.0%	138 64.8%



Topic 9: Marketing Jobs

What percentage of your company's marketing activities outsourced, meaning they are performed by outside agencies, vendors, or partners?

Minimum = 0

Maximum = 90

Mean = 20.18

Median = 20

Standard Deviation (Unbiased Estimate) = 17.87

95 Percent Confidence Interval Around the Mean = 17.81 - 22.54

Valid Cases = 219

Missing Cases = 98

Response Percent = 69.1%



Topic 9: Marketing Jobs

By what percentage will your company's outsourcing of marketing activities change in the next year?

Minimum = -22.50

Maximum = 34.49

Mean = 5.02

Median = 0

Standard Deviation (Unbiased Estimate) = 10.69

95 Percent Confidence Interval Around the Mean = 3.60 - 6.45

Valid Cases = 216

Missing Cases = 101

Response Percent = 68.1%


Topic 10: Marketing Performance
Compared to 2022, 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%	1	0.5 %	0.5 %
-30%	1	0.5 %	1.1 %
-20%	7	3.8 %	4.9 %
-10%	13	7.0 %	11.9 %
-7%	3	1.6 %	13.5 %
-5%	2	1.1 %	14.6 %
-3%	3	1.6 %	16.2 %
-1%	4	2.2 %	18.4 %
0	11	5.9 %	24.3 %
+1%	7	3.8 %	28.1 %
+3%	12	6.5 %	34.6 %
+5%	12	6.5 %	41.1 %
+7%	13	7.0 %	48.1 %
+10%	47	25.4 %	73.5 %
+20%	20	10.8 %	84.3 %
+30%	12	6.5 %	90.8 %
+40%	7	3.8 %	94.6 %
+50%	3	1.6 %	96.2 %
+75%	7	3.8 %	100.0 %
Total	185	100.0 %	100.0 %

Mean = 10.78

SD = 19.22

Missing Cases = 132

Response Percent = 58.4 %


Topic 10: Marketing Performance
Compared to 2022, rate your company's performance during the prior 12 months: Profits

	Number	Percent	Cumulative
-75%	1	0.6 %	0.6 %
-50%	1	0.6 %	1.1 %
-40%	0	0.0 %	1.1 %
-30%	1	0.6 %	1.7 %
-20%	8	4.4 %	6.1 %
-10%	11	6.1 %	12.2 %
-7%	2	1.1 %	13.3 %
-5%	3	1.7 %	15.0 %
-3%	2	1.1 %	16.1 %
-1%	4	2.2 %	18.3 %
0	22	12.2 %	30.6 %
+1%	11	6.1 %	36.7 %
+3%	7	3.9 %	40.6 %
+5%	19	10.6 %	51.1 %
+7%	7	3.9 %	55.0 %
+10%	44	24.4 %	79.4 %
+20%	18	10.0 %	89.4 %
+30%	8	4.4 %	93.9 %
+40%	2	1.1 %	95.0 %
+50%	3	1.7 %	96.7 %
+75%	6	3.3 %	100.0 %
Total	180	100.0 %	100.0 %

Mean = 7.96

SD = 19.24

Missing Cases = 137

Response Percent = 56.8 %


Topic 10: Marketing Performance
Compared to 2022, rate your company's performance during the prior 12 months: Customer Acquisition

	Number	Percent	Cumulative
-75%	1	0.6 %	0.6 %
-50%	0	0.0 %	0.6 %
-40%	0	0.0 %	0.6 %
-30%	2	1.1 %	1.7 %
-20%	1	0.6 %	2.2 %
-10%	9	5.0 %	7.2 %
-7%	0	0.0 %	7.2 %
-5%	6	3.3 %	10.6 %
-3%	5	2.8 %	13.3 %
-1%	0	0.0 %	13.3 %
0	21	11.7 %	25.0 %
+1%	7	3.9 %	28.9 %
+3%	22	12.2 %	41.1 %
+5%	27	15.0 %	56.1 %
+7%	7	3.9 %	60.0 %
+10%	35	19.4 %	79.4 %
+20%	21	11.7 %	91.1 %
+30%	7	3.9 %	95.0 %
+40%	1	0.6 %	95.6 %
+50%	3	1.7 %	97.2 %
+75%	5	2.8 %	100.0 %
Total	180	100.0 %	100.0 %

Mean = 8.40

SD = 17.19

Missing Cases = 137

Response Percent = 56.8 %


Topic 10: Marketing Performance
Compared to 2022, 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%	1	0.6 %	0.6 %
-30%	1	0.6 %	1.1 %
-20%	1	0.6 %	1.7 %
-10%	6	3.4 %	5.0 %
-7%	2	1.1 %	6.1 %
-5%	7	3.9 %	10.1 %
-3%	2	1.1 %	11.2 %
-1%	3	1.7 %	12.8 %
0	61	34.1 %	46.9 %
+1%	10	5.6 %	52.5 %
+3%	13	7.3 %	59.8 %
+5%	16	8.9 %	68.7 %
+7%	7	3.9 %	72.6 %
+10%	16	8.9 %	81.6 %
+20%	9	5.0 %	86.6 %
+30%	7	3.9 %	90.5 %
+40%	1	0.6 %	91.1 %
+50%	1	0.6 %	91.6 %
+75%	15	8.4 %	100.0 %
Total	179	100.0 %	100.0 %

Mean = 9.69

SD = 22.21

Missing Cases = 138

Response Percent = 56.5 %


Topic 10: Marketing Performance
Compared to 2022, rate your company's performance during the prior 12 months: Brand value

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	0	0.0 %	0.0 %
-20%	1	0.6 %	0.6 %
-10%	6	3.3 %	3.9 %
-7%	2	1.1 %	5.0 %
-5%	3	1.7 %	6.7 %
-3%	0	0.0 %	6.7 %
-1%	0	0.0 %	6.7 %
0	52	28.9 %	35.6 %
+1%	8	4.4 %	40.0 %
+3%	14	7.8 %	47.8 %
+5%	21	11.7 %	59.4 %
+7%	7	3.9 %	63.3 %
+10%	27	15.0 %	78.3 %
+20%	18	10.0 %	88.3 %
+30%	10	5.6 %	93.9 %
+40%	1	0.6 %	94.4 %
+50%	3	1.7 %	96.1 %
+75%	7	3.9 %	100.0 %
Total	180	100.0 %	100.0 %

Mean = 9.67

SD = 17.16

Missing Cases = 137

Response Percent = 56.8 %


Appendix: Company-level Descriptive Information
Which economic sector accounts for the majority of your company revenues?

	Number	Percent	95% CI
B2B - Product	123	38.9 %	± 5.4 %
B2B - Services	91	28.8 %	± 5.0 %
B2C - Product	63	19.9 %	± 4.4 %
B2C - Services	39	12.3 %	± 3.6 %
Total	316	100.0 %	

Missing Cases = 1

Response Percent = 99.7 %


Appendix: Company-level Descriptive Information
Which industry sector best describes your company?

	Number	Percent	95% CI
Technology / Software / Platform]	60	19.0 %	± 4.3 %
Banking / Finance / Insurance	42	13.3 %	± 3.8 %
Manufacturing	29	9.2 %	± 3.2 %
Consumer Packaged Goods	26	8.3 %	± 3.0 %
Professional Services / Consulting	26	8.3 %	± 3.0 %
Retail / Wholesale	25	8.0 %	± 2.8 %
Healthcare	22	7.0 %	± 2.8 %
Energy	16	5.1 %	± 2.4 %
Communications / Media	14	4.4 %	± 2.3 %
Education	11	3.5 %	± 2.0 %
Pharmaceuticals / Biotech	11	3.5 %	± 2.0 %
Real Estate	11	3.5 %	± 2.0 %
Transportation	11	3.5 %	± 2.0 %
Consumer Services	7	2.2 %	± 1.6 %
Mining / Construction	4	1.3 %	± 1.2 %
Total	315	100.0 %	

Missing Cases = 2

Response Percent = 99.4 %


Appendix: Company-level Descriptive Information
How many employees are in your company?

Number of Employees	Number	Percent	95% CI
<50	40	12.7 %	± 3.7 %
50- 99	29	9.2 %	± 3.2 %
100- 499	67	21.2 %	± 4.5 %
500- 999	33	10.4 %	± 3.4 %
1,000- 2,499	36	11.4 %	± 3.5 %
2,500- 4,999	28	8.9 %	± 3.1 %
5000- 9999	29	9.2 %	± 3.2 %
10,000+	54	17.1 %	± 4.2 %
Total	316	100.0 %	

Missing Cases = 1

Response Percent = 99.7 %


Appendix: Company-level Descriptive Information
What was your company's sales revenue in last 12 months?

	Number	Percent	Cumulative
Less than \$10 million	39	12.6 %	12.6 %
\$10-25 million	30	9.7 %	22.3 %
\$26-99 million	47	15.2 %	37.5 %
\$100-499 million	54	17.5 %	55.0 %
\$500-999 million	19	6.1 %	61.2 %
\$1-2.5 billion	49	15.9 %	77.0 %
\$2.6-5 billion	22	7.1 %	84.1 %
\$5.1-9.9 billion	17	5.5 %	89.6 %
\$10-49 billion	21	6.8 %	96.4 %
More than \$50+ billion	11	3.6 %	100.0 %
Total	309	100.0 %	100.0 %

Missing Cases = 8

Response Percent = 97.5 %



Appendix: Company-level Descriptive Information

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

Minimum = 0

Maximum = 82.56

Mean = 18.55

Median = 2

Standard Deviation (Unbiased Estimate) = 28.63

95 Percent Confidence Interval Around the Mean = 15.32 - 21.78

Valid Cases = 302

Missing Cases = 15

Response Percent = 95.3%

Percent sales through Internet - Buckets

	Number	Percent	95% CI
0%	123	40.7 %	± 5.4 %
1-10%	76	25.2 %	± 4.7 %
11-49%	44	14.6 %	± 3.8 %
50-99%	40	13.2 %	± 3.7 %
100%	19	6.3 %	± 2.6 %
Total	302	100.0 %	

Missing Cases = 15

Response Percent = 95.3 %