

# Managing the Challenges of Marketing Technology, Privacy, and Marketplace Threats

Topline Report  
Fall 2024

**Deloitte.**



AMERICAN MARKETING  
ASSOCIATION





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## The 33<sup>rd</sup> Edition of The CMO Survey, Fall 2024

### Survey Sample and Administration

- 2231 marketing leaders at U.S. for-profit companies; 260 responded for a 11.7% response rate—97.2% of respondents are VP-level or above.
- The survey was in the field from September 4-25.

### 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<sup>®</sup>

- **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, 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	87	37.0 %	± 5.8 %
2=No Change	79	33.6 %	± 5.6 %
1=Less	69	29.4 %	± 5.4 %
Total	235	100.0 %	

Mean = 2.08

SD = 0.81

Missing Cases = 25

Response Percent = 90.4 %



**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 = 25.25

Maximum = 100

Mean = 63.77

Median = 66

Standard Deviation (Unbiased Estimate) = 17.53

95 Percent Confidence Interval Around the Mean = 61.52 - 66.01

Valid Cases = 234

Missing Cases = 26

Response Percent = 90.0%

 **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	37	15.8 %	± 4.3 %
Yes, inflationary pressures are decreasing marketing spending levels	114	48.7 %	± 6.1 %
No	83	35.5 %	± 5.7 %
Total	234	100.0 %	

Missing Cases = 26

Response Percent = 90.0 %



**Topic 2: Marketing Budgets**

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

Minimum = 0

Maximum = 29.12

Mean = 10.10

Median = 8

Standard Deviation (Unbiased Estimate) = 8.54

95 Percent Confidence Interval Around the Mean = 8.64 - 11.57

Valid Cases = 130

Missing Cases = 130

Response Percent = 50.0%





**Topic 2: Marketing Budgets**

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

Minimum = 0

Maximum = 44.39

Mean = 7.70

Median = 4

Standard Deviation (Unbiased Estimate) = 11.06

95 Percent Confidence Interval Around the Mean = 5.83 - 9.56

Valid Cases = 135

Missing Cases = 125

Response Percent = 51.9%


**Topic 2: Marketing Budgets**
**Compared to your company's R&D budget, what is the size of your company's marketing budget?\***

	Number	Percent	95% CI
70% Marketing Budget is 70%+ Larger than the R&D Budget	19	13.7 %	± 3.2 %
60%	6	4.3 %	± 1.8 %
50%	5	3.6 %	± 1.7 %
40%	3	2.2 %	± 1.3 %
30%	6	4.3 %	± 1.8 %
20%	5	3.6 %	± 1.7 %
10%	2	1.4 %	± 1.1 %
5%	2	1.4 %	± 1.1 %
0 The Budgets are Equal	16	11.5 %	± 3.0 %
-5%	1	0.7 %	± 0.8 %
-10%	4	2.9 %	± 1.5 %
-20%	6	4.3 %	± 1.8 %
-30%	8	5.8 %	± 2.1 %
-40%	6	4.3 %	± 1.8 %
-50%	16	11.5 %	± 3.0 %
-60%	8	5.8 %	± 2.1 %
-70% R&D Budget is 70%+ Larger than the Marketing Budget	26	18.7 %	± 3.7 %
Total	139	100.0 %	

Mean = -9.89

SD = 49.77

Missing Cases = 121

Response Percent = 53.5 %

\*Negative numbers mean that the R&D budget is x% larger than the marketing budget and positive numbers mean that the marketing budget is x% larger than the R&D budget.

 **Topic 2: Marketing Budgets****By what percent has your marketing spending changed in the prior 12 months?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	5.84	22.31	2.17 - 9.51	4	-47.51	62.34	142
Digital marketing spending	11.07	24.40	7.06 - 15.09	10	-70	100	142



## Topic 2: Marketing Budgets

**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	12.66	13.24	10.39 - 14.93	10	-21.11	48.04	131
Overall marketing spending	8.59	13.66	6.24 - 10.94	5	-28.40	47.60	130
New product introductions	8.05	13.00	5.73 - 10.38	0	-28.92	47.08	120
Brand building	7.02	11.85	4.96 - 9.09	2	-25.47	41.09	127
Customer relationship management	6.90	8.61	5.37 - 8.43	5	-5	27.81	122
Customer experience spending	5.59	8.52	4.07 - 7.10	0	-10	28.39	121
New service introductions	4.27	7.66	2.88 - 5.66	0	-5	28.76	116
Traditional advertising spending	0.79	10.77	-1.11 - 2.68	0	-28.58	31.79	124



## Topic 2: Marketing Budgets

### How do your company's budgets for customer acquisition and customer retention compare?

	Number	Percent	95% CI
70% Retention Budget is 70%+ Larger than the Acquisition Budget	4	2.9 %	± 1.5 %
60%	1	0.7 %	± 0.8 %
50%	3	2.1 %	± 1.3 %
40%	2	1.4 %	± 1.1 %
30%	4	2.9 %	± 1.5 %
20%	5	3.6 %	± 1.7 %
10%	2	1.4 %	± 1.1 %
5%	1	0.7 %	± 0.8 %
0 The Budgets are Equal	45	32.1 %	± 4.7 %
-5%	1	0.7 %	± 0.8 %
-10%	4	2.9 %	± 1.5 %
-20%	7	5.0 %	± 2.0 %
-30%	8	5.7 %	± 2.1 %
-40%	7	5.0 %	± 2.0 %
-50%	16	11.4 %	± 3.0 %
-60%	5	3.6 %	± 1.7 %
-70% Acquisition Budget is 70%+ Larger than the Retention Budget	25	17.9 %	± 3.6 %
Total	140	100.0 %	

Mean = -19.57

SD = 36.80

Missing Cases = 120

Response Percent = 53.8 %

\*Negative numbers mean that the acquisition budget is x% larger than the retention budget and positive numbers mean that the retention budget is x% larger than the acquisition budget.



## Topic 2: Marketing Budgets

### **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?	12.07	11.85	10.08 - 14.05	10	137
What percent will you spend on social media in the next 12 months?	14.23	13.67	11.93 - 16.53	10	136
What percent will you spend on social media in the next five years?	19.12	15.60	16.47 - 21.77	15	133

 **Topic 2: Marketing Budgets**

**Indicate the percentage of your overall budget spent on long-term brand building relative to short-term performance:**

**Current brand budget\***

	Number	Percent	95% CI
70% Long-term Brand Building Budget is Larger	2	1.5 %	± 1.1 %
60%	1	0.8 %	± 0.8 %
50%	1	0.8 %	± 0.8 %
40%	1	0.8 %	± 0.8 %
30%	5	3.8 %	± 1.7 %
20%	4	3.0 %	± 1.5 %
10%	9	6.8 %	± 2.2 %
5%	3	2.3 %	± 1.3 %
0 The Budgets are Equal	33	25.0 %	± 4.1 %
-5%	2	1.5 %	± 1.1 %
-10%	8	6.1 %	± 2.1 %
-20%	10	7.6 %	± 2.4 %
-30%	11	8.3 %	± 2.5 %
-40%	2	1.5 %	± 1.1 %
-50%	16	12.1 %	± 3.0 %
-60%	7	5.3 %	± 2.0 %
-70% Short-term Brand Performance Budget is Larger	17	12.9 %	± 3.0 %
<b>Total</b>	<b>132</b>	<b>100.0 %</b>	

Mean = -18.83

SD = 33.18

Missing Cases = 128

Response Percent = 50.8 %

\*Negative numbers mean that the short-term brand performance budget is x% larger than the long-term brand building budget and positive numbers mean that the long-term brand building budget is x% larger than the short-term performance budget.

 **Topic 2: Marketing Budgets**

**Indicate the percentage of your overall budget spent on long-term brand building relative to short-term performance:**

**Ideal brand budget\***

	Number	Percent	95% CI
70%+ Long-term Brand Building Budget is Larger	1	0.8 %	± 0.8 %
60%	2	1.6 %	± 1.1 %
50%	5	4.1 %	± 1.7 %
40%	4	3.3 %	± 1.5 %
30%	8	6.5 %	± 2.1 %
20%	19	15.4 %	± 3.2 %
10%	11	8.9 %	± 2.5 %
5%	0	0.0 %	± 0.0 %
0 The Budgets are Equal	37	30.1 %	± 4.3 %
-5%	1	0.8 %	± 0.8 %
-10%	5	4.1 %	± 1.7 %
-20%	6	4.9 %	± 1.8 %
-30%	9	7.3 %	± 2.3 %
-40%	4	3.3 %	± 1.5 %
-50%	6	4.9 %	± 1.8 %
-60%	3	2.4 %	± 1.3 %
70%+ Short-term Brand Performance Budget is Larger	2	1.6 %	± 1.1 %
<b>Total</b>	<b>123</b>	<b>100.0 %</b>	

Mean = 0.85

SD = 28.61

Missing Cases = 137

Response Percent = 47.3 %

\*Negative numbers mean that the short-term brand performance budget is x% larger than the long-term brand building budget and positive numbers mean that the long-term brand building budget is x% larger than the short-term performance budget.



 **Topic 2: Marketing Budgets**

**When year-to-date profits are lower than expected, what percent of the time do company executives cut expenses versus work to grow revenues?**

	Number	Percent	95% CI
100% Cutting Expenses is the Priority	6	4.4 %	± 1.8 %
90%	3	2.2 %	± 1.3 %
80%	3	2.2 %	± 1.3 %
70%	8	5.9 %	± 2.1 %
60%	6	4.4 %	± 1.8 %
50%	13	9.6 %	± 2.7 %
40%	4	2.9 %	± 1.5 %
30%	8	5.9 %	± 2.1 %
20%	7	5.1 %	± 2.0 %
10%	5	3.7 %	± 1.7 %
5%	0	0.0 %	± 0.0 %
0 Priorities are Equal	28	20.6 %	± 3.8 %
-5%	0	0.0 %	± 0.0 %
-10%	3	2.2 %	± 1.3 %
-20%	7	5.1 %	± 2.0 %
-30%	4	2.9 %	± 1.5 %
-40%	3	2.2 %	± 1.3 %
-50%	9	6.6 %	± 2.2 %
-60%	1	0.7 %	± 0.8 %
-70%	3	2.2 %	± 1.3 %
-80%	6	4.4 %	± 1.8 %
-90%	3	2.2 %	± 1.3 %
-100% Growing Revenues is the Priority	6	4.4 %	± 1.8 %
<b>Total</b>	<b>136</b>	<b>100.0 %</b>	

Mean = 5.81  
SD = 53.34

Missing Cases = 124  
Response Percent = 52.3 %

\*Negative numbers mean that growing revenues is x% of the priority while positive numbers mean that cutting expenses is the priority x% of the time.



**Topic 2: Marketing Budgets**

**When year-to-date profits are lower than expected and the focus is on cutting expenses, how often do company executives cut marketing expenses over other areas? (% of the time)**

Minimum = 0

Maximum = 100

Mean = 44.59

Median = 40

Standard Deviation (Unbiased Estimate) = 37.13

95 Percent Confidence Interval Around the Mean = 38.15 - 51.02

Valid Cases = 128

Missing Cases = 132

Response Percent = 49.2%

 **Topic 3: Managing Marketing Technology****Is your company using marketing technology (martech) tools and/or systems?**

	Number	Percent	95% CI
Yes	148	76.7 %	± 6.1 %
No	45	23.3 %	± 4.6 %
Total	193	100.0 %	

Missing Cases = 67

Response Percent = 74.2 %

 **Topic 3: Managing Marketing Technology**

**What percent of your marketing activities use martech tools and/or systems?**

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	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing activities use martech tools and/or systems?	55.07	27.57	50.58 - 59.56	50	0	100	145



### Topic 3: Managing Marketing Technology

**Considering all the martech tools purchased by your company, what percent is your company currently utilizing in its operations?**

Minimum = 0

Maximum = 100

Mean = 51.53

Median = 50

Standard Deviation (Unbiased Estimate) = 33.44

95 Percent Confidence Interval Around the Mean = 46.01 - 57.05

Valid Cases = 141

Missing Cases = 7

Response Percent = 95.3%


**Topic 3: Managing Marketing Technology**
**How much impact are your current martech tools having on your company's performance?**

	Number	Percent	95% CI
1=Not at all	2	1.4 %	± 1.9 %
2	7	4.8 %	± 3.5 %
3	17	11.7 %	± 5.2 %
4	32	22.1 %	± 6.7 %
5	39	26.9 %	± 7.2 %
6	28	19.3 %	± 6.4 %
7=A great deal	20	13.8 %	± 5.6 %
Total	145	100.0 %	

Mean = 4.81

SD = 1.44

Missing Cases = 3

Response Percent = 98.0 %

 **Topic 3: Managing Marketing Technology****Is there is a gap between the actual payoffs of martech and your hopes for these payoffs?**

	Number	Percent	95% CI
Yes	79	54.9 %	± 8.1 %
No	65	45.1 %	± 8.1 %
Total	144	100.0 %	

Missing Cases = 4

Response Percent = 97.3 %



**Topic 3: Managing Marketing Technology**

**Rate the extent of this gap?**

Minimum = 5

Maximum = 90

Mean = 39.95

Median = 40

Standard Deviation (Unbiased Estimate) = 18.63

95 Percent Confidence Interval Around the Mean = 35.76 - 44.14

Valid Cases = 76

Missing Cases = 3

Response Percent = 96.2%






**Topic 3: Managing Marketing Technology**


**What percent of your marketing budget do you spend on marketing technology?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Current	18.96	17.56	16.06 - 21.86	15	0	90	141
1 year in future	22.83	19.08	19.65 - 26.02	20	0	90	138
5 years in future	31.69	23.48	27.77 - 35.61	25	2	95	138

 **Topic 4: Use of AI in Marketing**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Current	13.06	17.30	10.62 - 15.50	10	0	85	193
Next three years	34.48	24.39	31.04 - 37.92	30	0	100	193

 **Topic 4: Use of AI in Marketing**

**How, if at all, has this investment in AI and machine learning influenced how much time your marketers are able to spend on non-routine and more strategic activities in your company?**


	Number	Percent	95% CI
1=No impact	48	25.3 %	± 4.8 %
2	43	22.6 %	± 4.6 %
3	28	14.7 %	± 3.8 %
4	21	11.1 %	± 3.3 %
5	36	18.9 %	± 4.2 %
6	9	4.7 %	± 2.2 %
7=A great deal	5	2.6 %	± 1.7 %
Total	190	100.0 %	

Mean = 3.01

SD = 1.72

Missing Cases = 70

Response Percent = 73.1 %



**Topic 4: Use of AI in Marketing**

**What percent of the time is your company using generative AI in its marketing activities?**

Minimum = 0

Maximum = 80

Mean = 11.10

Median = 6


Standard Deviation (Unbiased Estimate) = 14.35

95 Percent Confidence Interval Around the Mean = 9.07 - 13.12

Valid Cases = 193

Missing Cases = 67

Response Percent = 74.2%



**Topic 4: Use of AI in Marketing**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Higher sales productivity	6.63	8.42	5.39 - 7.86	3	0	40	179
Lower marketing overhead costs	8.94	13.67	6.97 - 10.91	4.50	0	75	185
Higher customer satisfaction	6.30	11.84	4.55 - 8.05	0	0	65	176



**Topic 5: Digital Transformation and Privacy**

**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	26	14.6 %	± 3.7 %
Emerging: Build non-integrated digital elements	101	56.7 %	± 6.0 %
Integrated: Fully integrate digital investments across company	42	23.6 %	± 4.5 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	9	5.1 %	± 2.2 %
Total	178	100.0 %	

Missing Cases = 82

Response Percent = 68.5 %



**Topic 5: Digital Transformation and Privacy**

**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 = 72.04

Median = 82.50

Standard Deviation (Unbiased Estimate) = 32.40

95 Percent Confidence Interval Around the Mean = 67.29 - 76.79

Valid Cases = 179

Missing Cases = 81

Response Percent = 68.8%

 **Topic 5: Digital Transformation and Privacy**

**In general, do you think that the opportunity to pursue digital marketing opportunities has drawn your company’s attention away from marketing strategy fundamentals?**

	Number	Percent	95% CI
Yes	44	24.7 %	± 4.6 %
No	134	75.3 %	± 6.1 %
Total	178	100.0 %	

Missing Cases = 82  
Response Percent = 68.5 %



 **Topic 5: Digital Transformation and Privacy****Do you think customers would switch from a brand they are loyal to a different brand that offers better privacy protections?**

	Number	Percent	95% CI
Yes	77	43.5 %	± 5.6 %
No	100	56.5 %	± 6.0 %
Total	177	100.0 %	

Missing Cases = 83

Response Percent = 68.1 %

 **Topic 5: Digital Transformation and Privacy**

**Which of the following actions, if any, has your company taken to increase the trust of your brand in the face of privacy concerns?**

	Number	Percent	95% CI
Invested in technology infrastructure to reduce the likelihood of a data breach	124	73.8 %	± 6.7 %
Promised not to sell customers' personal information	101	60.1 %	± 7.5 %
Asked consumers to consent to your company's use of their data (i.e., informed consent)	96	57.1 %	± 7.6 %
Invested in increasing trust in your brand reputation	96	57.1 %	± 7.6 %
Shared privacy notices with consumers that communicate how your company will use their data	91	54.2 %	± 7.6 %
Made your privacy policy easy to understand	86	51.2 %	± 7.6 %
Developed a brand privacy policy	79	47.0 %	± 7.6 %
Quickly disclosed any data breaches	56	33.3 %	± 7.2 %
Invested in improving the amount of value you offer in return for shared customer information	36	21.4 %	± 6.3 %
Used privacy as a brand differentiator	25	14.9 %	± 5.4 %
Invested in fostering customer referrals from trusted sources	0	0.0 %	± 0.0 %
<b>Total</b>	<b>790</b>		

Number of Cases = 168

Number of Responses = 790

Average Number of Responses Per Case = 4.7

Number of Cases With at Least One Response = 168

Response Percent = 100.0 %



**Topic 5: Digital Transformation and Privacy**

**In the wake of third-party cookies disappearing, which actions has your company taken?**

	Number	Percent	95% CI
Created a stronger data strategy to capture better information around customer touchpoints	72	41.9 %	± 7.5 %
My company has no concerns about third-party cookies	60	34.9 %	± 7.2 %
Invested in customer data platform (CDP) that offers better information about the customer journey	56	32.6 %	± 7.1 %
Invested in innovations to engage with customers directly	52	30.2 %	± 6.9 %
Reduced internal data siloes to generate a more complete view of consumers	50	29.1 %	± 6.9 %
Created strategic partnerships with agencies and partners to generate data around customer touchpoints	50	29.1 %	± 6.9 %
Offered customers incentives to provide access to their data	29	16.9 %	± 5.7 %
Total	369		

Number of Cases = 172

Number of Responses = 369

Average Number of Responses Per Case = 2.1

Number of Cases With at Least One Response = 172

Response Percent = 100.0 %

 **Topic 5: Digital Transformation and Privacy**

**If blockchain technologies allow customers to control access to their online search and purchase histories, how disruptive would this be to your current business?**

	Number	Percent	95% CI
1=Not at all	48	28.6 %	± 4.8 %
2	43	25.6 %	± 4.6 %
3	19	11.3 %	± 3.2 %
4	31	18.5 %	± 4.0 %
5	12	7.1 %	± 2.6 %
6	11	6.5 %	± 2.5 %
7=A great deal	4	2.4 %	± 1.5 %
Total	168	100.0 %	

Mean = 2.79

SD = 1.68

Missing Cases = 92

Response Percent = 64.6 %


**Topic 6: Coping with Marketing Challenges**
**Which of the following challenges or threats has your company faced in the last decade?**

	Number	Percent	95% CI
Dramatic increase in the rivalry among existing competitors in your industry	87	58.0 %	± 8.0 %
Entrance of a powerful competitor into your markets	67	44.7 %	± 8.1 %
Major change in consumer preferences or behaviors upon which your business is based	66	44.0 %	± 8.0 %
Legal or regulatory changes that threaten your offerings and/or go-to-market strategy	54	36.0 %	± 7.8 %
Major business model change influencing how your industry competes/operates	53	35.3 %	± 7.7 %
Challenges to the fairness or affordability of your company's pricing strategy	44	29.3 %	± 7.4 %
Threats to your go-to-market strategy posed by Covid-19 pandemic	39	26.0 %	± 7.1 %
Major product or service failure	20	13.3 %	± 5.5 %
Increased scrutiny regarding the honesty and integrity of how your company deals with customers	19	12.7 %	± 5.4 %
Total	449		

Number of Cases = 150

Number of Responses = 449

Average Number of Responses Per Case = 3.1

Number of Cases With at Least One Response = 150

Response Percent = 100.0 %

 **Topic 6: Coping with Marketing Challenges**

**Of those challenges checked above, select which was the most difficult for your company:**

	Number	Percent	95% CI
Dramatic increase in the rivalry among existing competitors in your industry	37	25.3 %	± 4.3 %
Entrance of a powerful competitor into your markets	21	14.4 %	± 3.3 %
Major change in consumer preferences or behaviors upon which your business is based	21	14.4 %	± 3.3 %
Legal or regulatory changes that threaten your offerings and/or go-to-market strategy	17	11.6 %	± 3.0 %
Threats to your go-to-market strategy posed by Covid-19 pandemic	15	10.3 %	± 2.9 %
Major business model change influencing how your industry competes/operates	14	9.6 %	± 2.8 %
Challenges to the fairness or affordability of your company's pricing strategy	11	7.5 %	± 2.5 %
Major product or service failure	9	6.2 %	± 2.2 %
Increased scrutiny regarding the honesty and integrity of how your company deals with customers	1	0.7 %	± 0.8 %
<b>Total</b>	<b>146</b>	<b>100.0 %</b>	

Missing Cases = 114

Response Percent = 56.2 %



**Topic 6: Coping with Marketing Challenges**

**Which of the following outcomes were associated with this challenge for your company?**

	Number	Percent	95% CI
Lost revenues	106	76.3 %	± 7.2 %
Lower profits	79	56.8 %	± 8.3 %
Weakened employee morale	45	32.4 %	± 7.9 %
Employee layoffs	36	25.9 %	± 7.4 %
Weakened customer relationships	35	25.2 %	± 7.3 %
Weakened brand reputation	29	20.9 %	± 6.8 %
Weakened partner relationships	22	15.8 %	± 6.1 %
Total	352		


Number of Cases = 139

Number of Responses = 352

Average Number of Responses Per Case = 2.5

Number of Cases With at Least One Response = 139

Response Percent = 100.0 %



**Topic 6: Coping with Marketing Challenges**

**How well did your company cope with this challenge?**

	Number	Percent	95% CI
1=Very poorly	6	4.1 %	± 1.8 %
2	4	2.8 %	± 1.5 %
3	13	9.0 %	± 2.7 %
4	32	22.1 %	± 4.0 %
5	40	27.6 %	± 4.4 %
6	38	26.2 %	± 4.3 %
7=Very well	12	8.3 %	± 2.6 %
Total	145	100.0 %	

Mean = 4.78

SD = 1.43

Missing Cases = 115

Response Percent = 55.8 %





## Topic 6: Coping with Marketing Challenges

**Which statement best describes how your company responded to the challenge? It is likely that both statements will apply to some degree. Select the statement that is the best reflection of your company's response from the pair offered.**

	Number	Percent	95% CI
We were able to plan our way through this threat.	67	51.9 %	± 5.4 %
We had to improvise to find a way to cope with this threat.	62	48.1 %	± 5.2 %
Total	129	100.0 %	

Missing Cases = 131  
Response Percent = 49.6 %

	Number	Percent	95% CI
We were focused on resolving the threat.	57	46.7 %	± 5.1 %
We were focused on taking advantage of the opportunities associated with this threat.	65	53.3 %	± 5.3 %
Total	122	100.0 %	

Missing Cases = 138  
Response Percent = 46.9 %

	Number	Percent	95% CI
We protected our current strategy.	45	36.0 %	± 4.7 %
We were willing to let go of some aspects of our current strategy.	80	64.0 %	± 5.7 %
Total	125	100.0 %	

Missing Cases = 135  
Response Percent = 48.1 %

	Number	Percent	95% CI
We chose to retain our portfolio of products and services.	81	66.4 %	± 5.7 %
We chose to terminate some products and services from our portfolio.	41	33.6 %	± 4.5 %
Total	122	100.0 %	

Missing Cases = 138  
Response Percent = 46.9 %

	Number	Percent	95% CI
We relied on our existing knowledge and capabilities to respond.	59	48.0 %	± 5.2 %
We built/hired new knowledge and capabilities to respond.	64	52.0 %	± 5.3 %
Total	123	100.0 %	

Missing Cases = 137  
Response Percent = 47.3 %

 **Topic 6: Coping with Marketing Challenges**

**Consider the mindset of people in your company as you worked through this challenge. From the pairs of words offered below, which one best describes this mindset?**

	Number	Percent	95% CI
Optimistic	104	78.2 %	± 6.0 %
Pessimistic	29	21.8 %	± 3.9 %
Total	133	100.0 %	

Missing Cases = 127  
Response Percent = 51.2 %

	Number	Percent	95% CI
Defensive	59	42.4 %	± 5.2 %
Proactive	80	57.6 %	± 5.7 %
Total	139	100.0 %	

Missing Cases = 121  
Response Percent = 53.5 %

	Number	Percent	95% CI
Flexible	115	85.2 %	± 6.1 %
Inflexible	20	14.8 %	± 3.3 %
Total	135	100.0 %	

Missing Cases = 125  
Response Percent = 51.9 %

	Number	Percent	95% CI
Fearful	69	53.5 %	± 5.4 %
Fearless	60	46.5 %	± 5.2 %
Total	129	100.0 %	

Missing Cases = 131  
Response Percent = 49.6 %


**Topic 6: Coping with Marketing Challenges**
**To what extent did the following help your company cope with this challenge? (check all that apply)**

	Number	Percent	95% CI
We communicated openly and regularly	91	63.2 %	± 8.0 %
We had early warning signs about this challenge	76	52.8 %	± 8.3 %
We had strong internal alignment on goals	71	49.3 %	± 8.3 %
We worked long hours	58	40.3 %	± 8.1 %
We had strong partner/agency relationships	46	31.9 %	± 7.7 %
We had well-developed skills/capabilities for changing our company	46	31.9 %	± 7.7 %
We ran experiments	38	26.4 %	± 7.3 %
We were lucky	22	15.3 %	± 6.0 %
We had slack resources	11	7.6 %	± 4.4 %
Total	459		

Number of Cases = 144

Number of Responses = 459

Average Number of Responses Per Case = 3.2

Number of Cases With at Least One Response = 144

Response Percent = 100.0 %

 **Topic 6: Coping with Marketing Challenges**

**Which company resources were most important to your company’s ability to cope with this challenge? (rank 1, 2, 3, where 1 is most important)**

	Mean & SD	1	2	3	Total
Our financial resources	1.81 0.81	32 23.5%	24 17.6%	18 13.2%	74 54.4%
Our human resources	1.85 0.87	28 20.6%	15 11.0%	19 14.0%	62 45.6%
Our customer relationships	1.98 0.75	31 22.8%	48 35.3%	29 21.3%	108 79.4%
Our brand reputation	2.03 0.83	30 22.1%	30 22.1%	33 24.3%	93 68.4%
Our partner relationships	2.21 0.85	14 10.3%	13 9.6%	25 18.4%	52 38.2%
Outside help	2.27 0.65	1 0.7%	6 4.4%	4 2.9%	11 8.1%



**Topic 7: Marketing Jobs**

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

Minimum = -75

Maximum = 100

Mean = 5.30

Median = 0

Standard Deviation (Unbiased Estimate) = 26.11

95 Percent Confidence Interval Around the Mean = 1.32 - 9.29

Valid Cases = 165

Missing Cases = 95

Response Percent = 63.5%



**Topic 7: 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 = -40.65

Maximum = 48.18

Mean = 4.03

Median = 0

Standard Deviation (Unbiased Estimate) = 14.23

95 Percent Confidence Interval Around the Mean = 1.87 - 6.20

Valid Cases = 166

Missing Cases = 94

Response Percent = 63.8%

 **Topic 7: Marketing Jobs**

**To what extent are new technologies replacing marketing employees in your company?**

	Mean & SD	Not at all						A great deal	Total
Currently	1.78 1.29	103 62.4%	29 17.6%	14 8.5%	10 6.1%	4 2.4%	4 2.4%	1 0.6%	165 100.0%
Next three years	2.87 1.71	45 27.3%	35 21.2%	36 21.8%	16 9.7%	16 9.7%	12 7.3%	5 3.0%	165 100.0%



**Topic 7: Marketing Jobs**

**What percent of your marketing organization is working from home?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
All the time	37.76	41.03	31.56 - 43.97	20	0	100	168
Some the time	55.57	39.87	49.47 - 61.68	70	0	100	164





**Topic 7: Marketing Jobs**

**What percent of your marketing budget to you spend on diversity, equity, or inclusion?**

Minimum = 0

Maximum = 95

Mean = 3.79

Median = 0

Standard Deviation (Unbiased Estimate) = 9.77

95 Percent Confidence Interval Around the Mean = 2.27 - 5.31

Valid Cases = 159

Missing Cases = 101

Response Percent = 61.2%



**Topic 7: Marketing Jobs**

**How diverse is your marketing organization?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
%Female	60.60	24.59	56.66 - 64.55	60	0	100	149
%Non-white	23.70	20.48	20.16 - 27.23	20	0	100	129
%Disabled	1.53	3.39	0.88 - 2.18	0	0	20	105
% LGBTQ+	8.41	10.42	6.46 - 10.37	5	0	50	109

 **Topic 8: Marketing Leadership**

**How much time do you spend managing the present versus preparing for the future of marketing in your company?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Managing the present	67.90	18.72	65.02 - 70.78	75	10	99	162
Preparing for the future	32.10	18.72	29.22 - 34.98	25	1	90	162

 **Topic 8: 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=Some of the time	5	6	7=All the time	Total
Board meetings	4.44 2.22	8 16.7%	5 10.4%	3 6.3%	6 12.5%	6 12.5%	8 16.7%	12 25.0%	48 100.0%
Preparation for earnings calls	4.65 2.24	8 16.7%	3 6.3%	3 6.3%	6 12.5%	8 16.7%	4 8.3%	16 33.3%	48 100.0%

 **Topic 8: Marketing Leadership**

**Rate the extent to which your company is transparent with customers about the following topics:**

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Highly	Total
Data collection	5.60 1.69	7 4.5%	4 2.5%	10 6.4%	15 9.6%	18 11.5%	37 23.6%	66 42.0%	157 100.0%
Data usage	5.42 1.73	7 4.5%	6 3.9%	9 5.8%	20 13.0%	21 13.6%	33 21.4%	58 37.7%	154 100.0%
Partnerships to source to bring products/ services to market	5.31 1.61	5 3.3%	4 2.6%	12 7.8%	26 17.0%	21 13.7%	40 26.1%	45 29.4%	153 100.0%
Employee welfare	4.61 1.96	15 9.7%	12 7.8%	18 11.7%	25 16.2%	22 14.3%	27 17.5%	35 22.7%	154 100.0%
Environment impact	4.58 2.12	23 14.7%	12 7.7%	12 7.7%	18 11.5%	26 16.7%	25 16.0%	40 25.6%	156 100.0%
How your company makes money	4.87 1.96	15 9.6%	10 6.4%	13 8.3%	21 13.4%	24 15.3%	32 20.4%	42 26.8%	157 100.0%



## Topic 9: Marketing Growth

### By what percent are revenues in your largest sales revenue market growing or decreasing in size?

Minimum = -82

Maximum = 140

Mean = 7.92

Median = 6

Standard Deviation (Unbiased Estimate) = 24.54

95 Percent Confidence Interval Around the Mean = 4.66 - 11.18

Valid Cases = 218

Missing Cases = 42

Response Percent = 83.8%

 **Topic 9: Marketing Growth**

**Will you use a channel or go directly to market?**

	Number	Percent	95% CI
Uses channel partners	160	61.5 %	± 6.0 %
Does not use channel partners	100	38.5 %	± 6.0 %
Total	260	100.0 %	

Missing Cases = 0  
Response Percent = 100.0 %



**Topic 9: Marketing Growth**

**Allocate 100 points to reflect your company's spending in each of the four growth strategies during the prior 12 months.**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products/services in existing markets	57.4	26.6	52.9 - 61.9	60	0	100	134
New products/services in existing markets	19.2	18.3	16.1 - 22.3	15	0	90	134
Existing products/services in new markets	17.0	17.8	14.0 - 20.0	10	0	80	134
New products/services in new markets	6.4	8.9	4.9 - 7.9	0	0	40	134





**Topic 9: Marketing Growth**

**Percent Sales Online - Average Scores**

What percentage of your company's sales are made online?

Minimum = 0

Maximum = 73.83

Mean = 15.93

Median = 5

Standard Deviation (Unbiased Estimate) = 23.96

95 Percent Confidence Interval Around the Mean = 12.95 - 18.92

Valid Cases = 247

Missing Cases = 13

Response Percent = 95.0%

**Percent Online Sales - Buckets**

	Number	Percent	95% CI
0%	94	38.1 %	± 5.9 %
1-10%	72	29.1 %	± 5.5 %
11-49%	45	18.2 %	± 4.6 %
50-99%	25	10.1 %	± 3.6 %
100%	11	4.5 %	± 2.5 %
Total	247	100.0 %	

Missing Cases = 13

Response Percent = 95.0 %

 **Topic 10: Marketing Performance**

**Compared to last year (2023), rate your company's performance during the prior 12 months:**

**Sales revenue**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	2	1.5 %	1.5 %
-40%	1	0.7 %	2.2 %
-30%	2	1.5 %	3.7 %
-20%	7	5.2 %	9.0 %
-10%	9	6.7 %	15.7 %
-7%	2	1.5 %	17.2 %
-5%	6	4.5 %	21.6 %
-3%	3	2.2 %	23.9 %
-1%	2	1.5 %	25.4 %
0	6	4.5 %	29.9 %
+1%	3	2.2 %	32.1 %
+3%	9	6.7 %	38.8 %
+5%	16	11.9 %	50.7 %
+7%	13	9.7 %	60.4 %
+10%	18	13.4 %	73.9 %
+20%	14	10.4 %	84.3 %
+30%	10	7.5 %	91.8 %
+40%	2	1.5 %	93.3 %
+50%	2	1.5 %	94.8 %
+75%	7	5.2 %	100.0 %
<b>Total</b>	<b>134</b>	<b>100.0 %</b>	<b>100.0 %</b>

Mean = 8.81

SD = 22.46

Missing Cases = 126

Response Percent = 51.5 %

 **Topic 10: Marketing Performance**

**Compared to last year (2023), rate your company's performance during the prior 12 months:**

**Profits**

	Number	Percent	Cumulative
-75%	1	0.8 %	0.8 %
-50%	2	1.6 %	2.3 %
-40%	1	0.8 %	3.1 %
-30%	3	2.3 %	5.4 %
-20%	4	3.1 %	8.5 %
-10%	8	6.2 %	14.7 %
-7%	0	0.0 %	14.7 %
-5%	3	2.3 %	17.1 %
-3%	6	4.7 %	21.7 %
-1%	3	2.3 %	24.0 %
0	16	12.4 %	36.4 %
+1%	3	2.3 %	38.8 %
+3%	9	7.0 %	45.7 %
+5%	10	7.8 %	53.5 %
+7%	9	7.0 %	60.5 %
+10%	22	17.1 %	77.5 %
+20%	15	11.6 %	89.1 %
+30%	3	2.3 %	91.5 %
+40%	2	1.6 %	93.0 %
+50%	2	1.6 %	94.6 %
+75%	7	5.4 %	100.0 %
Total	129	100.0 %	100.0 %

Mean = 7.42

SD = 23.32

Missing Cases = 131

Response Percent = 49.6 %

 **Topic 10: Marketing Performance**

**Compared to last year (2023), rate your company's performance during the prior 12 months:**

**Customer acquisition**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	2	1.6 %	1.6 %
-40%	0	0.0 %	1.6 %
-30%	2	1.6 %	3.1 %
-20%	1	0.8 %	3.9 %
-10%	6	4.7 %	8.6 %
-7%	0	0.0 %	8.6 %
-5%	1	0.8 %	9.4 %
-3%	3	2.3 %	11.7 %
-1%	3	2.3 %	14.1 %
0	17	13.3 %	27.3 %
+1%	9	7.0 %	34.4 %
+3%	15	11.7 %	46.1 %
+5%	20	15.6 %	61.7 %
+7%	4	3.1 %	64.8 %
+10%	25	19.5 %	84.4 %
+20%	8	6.3 %	90.6 %
+30%	5	3.9 %	94.5 %
+40%	2	1.6 %	96.1 %
+50%	2	1.6 %	97.7 %
+75%	3	2.3 %	100.0 %
Total	128	100.0 %	100.0 %

Mean = 6.95

SD = 17.25

Missing Cases = 132

Response Percent = 49.2 %

 **Topic 10: Marketing Performance**

**Compared to last year (2023), 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	0.8 %	0.8 %
-30%	0	0.0 %	0.8 %
-20%	0	0.0 %	0.8 %
-10%	6	4.7 %	5.4 %
-7%	1	0.8 %	6.2 %
-5%	3	2.3 %	8.5 %
-3%	5	3.9 %	12.4 %
-1%	5	3.9 %	16.3 %
0	41	31.8 %	48.1 %
+1%	9	7.0 %	55.0 %
+3%	6	4.7 %	59.7 %
+5%	13	10.1 %	69.8 %
+7%	2	1.6 %	71.3 %
+10%	15	11.6 %	82.9 %
+20%	5	3.9 %	86.8 %
+30%	3	2.3 %	89.1 %
+40%	0	0.0 %	89.1 %
+50%	0	0.0 %	89.1 %
+75%	14	10.9 %	100.0 %
<b>Total</b>	<b>129</b>	<b>100.0 %</b>	<b>100.0 %</b>

Mean = 10.50

SD = 23.98

Missing Cases = 131

Response Percent = 49.6 %

 **Topic 10: Marketing Performance**

**Compared to last year (2023), 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%	1	0.8 %	0.8 %
-20%	1	0.8 %	1.6 %
-10%	2	1.6 %	3.2 %
-7%	0	0.0 %	3.2 %
-5%	4	3.2 %	6.3 %
-3%	1	0.8 %	7.1 %
-1%	2	1.6 %	8.7 %
0	35	27.8 %	36.5 %
+1%	7	5.6 %	42.1 %
+3%	8	6.3 %	48.4 %
+5%	18	14.3 %	62.7 %
+7%	3	2.4 %	65.1 %
+10%	18	14.3 %	79.4 %
+20%	14	11.1 %	90.5 %
+30%	5	4.0 %	94.4 %
+40%	1	0.8 %	95.2 %
+50%	1	0.8 %	96.0 %
+75%	5	4.0 %	100.0 %
Total	126	100.0 %	100.0 %

Mean = 8.90

SD = 17.07

Missing Cases = 134

Response Percent = 48.5 %

 **Topic 10: Marketing Performance**

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

(N=260)

	We prove the impact quantitatively	We have a good qualitative sense of the impact, but not a quantitative impact	We haven't been able to show the impact yet	Total
Which best describes how your company shows the short-term impact of marketing spend on your business?	77 54.6%	45 31.9%	19 13.5%	141 100.0%
Which best describes how your company shows the long-term impact of marketing spend on your business?	59 41.8%	51 36.2%	31 22.0%	141 100.0%



**Topic 10: Marketing Performance**

**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 = 32.72

Median = 24

Standard Deviation (Unbiased Estimate) = 26.67

95 Percent Confidence Interval Around the Mean = 28.17 - 37.27

Valid Cases = 132

Missing Cases = 128

Response Percent = 50.8%



 **Appendix: Company-level Descriptive Information**

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

	Number	Percent	95% CI
B2B - Product	78	30.1 %	± 5.6 %
B2B - Services	73	28.2 %	± 5.5 %
B2C - Product	77	29.7 %	± 5.6 %
B2C - Services	31	12.0 %	± 4.0 %
Total	259	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %


**Appendix: Company-level Descriptive Information**
**Industry Sector**

	Number	Percent	95% CI
Tech / Software / Platform	36	13.9 %	± 4.2 %
Consumer Packaged Goods	31	12.0 %	± 4.0 %
Pharma / Biotech	25	9.7 %	± 3.6 %
Banking / Finance / Insurance	24	9.3 %	± 3.5 %
Healthcare	24	9.3 %	± 3.5 %
Manufacturing	23	8.9 %	± 3.5 %
Retail / Wholesale	23	8.9 %	± 3.5 %
Professional Services	20	7.7 %	± 3.3 %
Energy	10	3.9 %	± 2.4 %
Communications / Media	10	3.9 %	± 2.4 %
Consumer Services	9	3.5 %	± 2.2 %
Transportation	8	3.1 %	± 2.1 %
Education	7	2.7 %	± 2.0 %
Real Estate	7	2.7 %	± 2.0 %
<u>Mining / Construction</u>	2	0.8 %	± 1.1 %
Total	259	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %


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

	Number	Percent	95% CI
<50	33	12.7 %	± 4.1 %
50- 99	18	6.9 %	± 3.1 %
100- 499	45	17.3 %	± 4.6 %
500- 999	18	6.9 %	± 3.1 %
1,000- 2,499	27	10.4 %	± 3.7 %
2,500- 4,999	23	8.8 %	± 3.5 %
5000- 9999	26	10.0 %	± 3.7 %
10,000+	70	26.9 %	± 5.4 %
Total	260	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %


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

	Number	Percent	Cumulative
Less than \$10 million	27	10.5 %	10.5 %
\$10-25 million	21	8.2 %	18.7 %
\$26-99 million	32	12.5 %	31.1 %
\$100-499 million	41	16.0 %	47.1 %
\$500-999 million	16	6.2 %	53.3 %
\$1-2.5 billion	30	11.7 %	65.0 %
\$2.6-5 billion	29	11.3 %	76.3 %
\$5.1-9.9 billion	16	6.2 %	82.5 %
\$10-49 billion	28	10.9 %	93.4 %
More than \$50+ billion	17	6.6 %	100.0 %
Total	257	100.0 %	100.0 %

Missing Cases = 3

Response Percent = 98.8 %

 **Appendix: Company-level Descriptive Information**

**Does your company sell its products and/or services to the government?**

	Number	Percent	95% CI
Yes	109	42.2 %	± 6.0 %
No	149	57.8 %	± 6.1 %
Total	258	100.0 %	

Missing Cases = 2  
Response Percent = 99.2 %

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