

The **CMO** Survey<sup>®</sup> 

# Leading Marketing in a Complex World

Firm and Industry Breakout Report | 2025

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# Leading Marketing in a Complex World

## The 34<sup>th</sup> Edition of The CMO Survey, 2025

### Survey Sample and Administration

- 2047 marketing leaders at U.S. for-profit companies; 281 responded for a 13.7% response rate—99% of respondents are VP-level or above.
- The survey was in the field from January 21-February 12.

### 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?**

N=253	N=253											
	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
3=More	79 31.2%	29 31.9%	16 27.6%	23 33.8%	10 29.4%	34 36.2%	27 38.0%	9 22.0%	4 17.4%	3 21.4%	35 34.0%	43 29.5%
2=No Change	52 20.6%	17 18.7%	14 24.1%	12 17.6%	9 26.5%	22 23.4% b	8 11.3% ae	8 19.5%	6 26.1%	5 35.7% b	23 22.3%	28 19.2%
1=Less	122 48.2%	45 49.5%	28 48.3%	33 48.5%	15 44.1%	38 40.4%	36 50.7%	24 58.5%	13 56.5%	6 42.9%	45 43.7%	75 51.4%
Mean	1.83	1.82	1.79	1.85	1.85	1.96 c	1.87	1.63 a	1.61	1.79	1.90	1.78

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**Are you more or less optimistic about the U.S. economy compared to last quarter?**

N=253

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
3=More	12 42.9% b	0 0.0% adghmn	7 25.0%	3 42.9% b	0 0.0%	1 16.7%	12 44.4% b	6 33.3% b	8 28.6%	1 33.3%	3 20.0%	1 14.3%	13 34.2% b	4 57.1% b	8 30.8%
2=No Change	3 10.7% bk	4 40.0% ao	7 25.0%	2 28.6%	1 20.0%	0 0.0%	5 18.5%	5 27.8%	5 17.9%	0 0.0%	6 40.0% ao	3 42.9% o	9 23.7%	0 0.0%	2 7.7% bkl
1=Less	13 46.4%	6 60.0%	14 50.0%	2 28.6%	4 80.0%	5 83.3% g	10 37.0% f	7 38.9%	15 53.6%	2 66.7%	6 40.0%	3 42.9%	16 42.1%	3 42.9%	16 61.5%
Mean	1.96	1.40 dg	1.75	2.14 b	1.20 g	1.33	2.07 be	1.94	1.75	1.67	1.80	1.71	1.92	2.14	1.69

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**Are you more or less optimistic about the U.S. economy compared to last quarter?**

N=253	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
3=More	9 31.0%	4 26.7%	8 26.7%	17 34.7%	4 21.1%	19 30.6%	17 37.0%	13 41.9% C	7 38.9% c	7 14.9% AbH	6 30.0%	10 33.3%	2 13.3%	7 31.8%	26 37.7% C
2=No Change	6 20.7%	6 40.0% cf	3 10.0% b	13 26.5%	5 26.3%	10 16.1% b	8 17.4%	5 16.1%	2 11.1%	14 29.8% f	8 40.0% Fh	6 20.0%	0 0.0% cD	5 22.7%	12 17.4% d
1=Less	14 48.3%	5 33.3%	19 63.3% d	19 38.8% c	10 52.6%	33 53.2%	21 45.7%	13 41.9% F	9 50.0% f	26 55.3% f	6 30.0% F	14 46.7% f	13 86.7% AbcDegH	10 45.5% f	31 44.9% F
Mean	1.83	1.93	1.63	1.96	1.68	1.77	1.91	2.00 cF	1.89 f	1.60 adh	2.00 cF	1.87 f	1.27 AbDegh	1.86 f	1.93 cf

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	253	91	57	68	35	94	72	41	23	14	103	146
Mean	62.16	61.15	61.28	61.76	67.57	65.31	63.11	55.97	59.13	60.93	62.91	61.85
SD	18.89	19.13	19.07	18.61	17.52	17.46	20.01	19.10	18.97	19.43	20.33	17.68
						C		A				

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 1: Macroeconomic Forecasts**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
N	28	9	28	7	5	6	28	18	28	3	15	7	38	7	26
Mean	65.11	48.44	59.60	64.71	50.19	59.00	68.57	57.83	62.36	51.67	66.33	72.43	61.47	72.00	59.07
SD	20.99	17.99	17.60	12.20	26.29	18.97	18.75	21.47	17.94	16.07	14.57	17.74	19.74	8.54	18.68
	b	aGkIN					B			n	b	b		Bj	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

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

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50- 99 B	100- 499 C	500- 999 D	1,000- 2,499 E	2,500- 4,999 F	5000- 9999 G	10,000+ H
N	29	15	30	49	19	63	46	31	18	47	19	30	15	22	70
Mean	55.89	58.20	62.23	67.45	59.36	61.43	63.74	58.90	62.00	59.74	70.05	61.86	56.73	60.09	64.73
SD	20.64	15.24	18.57	16.43	20.46	18.00	21.44	20.09	21.09	16.91	17.42	18.23	16.30	21.08	19.29
	D			A						d	cf		d		

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

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

N=253

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Yes, inflationary pressures are increasing marketing spending levels	42 16.6%	18 19.6%	6 10.3%	10 14.9%	7 20.6%	17 18.1%	12 16.9%	6 14.6%	4 17.4%	2 13.3%	18 17.8%	23 15.5%
Yes, inflationary pressures are decreasing marketing spending levels	110 43.5%	37 40.2%	25 43.1%	32 47.8%	16 47.1%	30 31.9%	35 49.3%	22 53.7%	9 39.1%	8 53.3%	36 35.6%	73 49.3%
No	101 39.9%	37 40.2%	27 46.6%	25 37.3%	11 32.4%	47 50.0%	24 33.8%	13 31.7%	10 43.5%	5 33.3%	47 46.5%	52 35.1%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

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

N=253

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Yes, inflationary pressures are increasing marketing spending levels	5 17.9%	2 20.0%	3 10.7% d	3 50.0% cG	0 0.0%	1 16.7%	1 3.7% DI	4 22.2%	9 32.1% G	0 0.0%	2 13.3%	1 14.3%	7 17.9%	0 0.0%	4 15.4%
Yes, inflationary pressures are decreasing marketing spending levels	13 46.4%	7 70.0% hk	17 60.7% hkm	1 16.7% n	2 40.0%	3 50.0%	12 44.4%	4 22.2% bcN	11 39.3% n	1 33.3%	4 26.7% bcn	3 42.9%	14 35.9% cn	6 85.7% dHikm	12 46.2%
No	10 35.7%	1 10.0% ghkm	8 28.6%	2 33.3%	3 60.0%	2 33.3%	14 51.9% b	10 55.6% b	8 28.6%	2 66.7%	9 60.0% b	3 42.9%	18 46.2% b	1 14.3%	10 38.5%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

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

N=253

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Yes, inflationary pressures are increasing marketing spending levels	6 20.7%	3 20.0%	6 20.7%	7 14.3%	2 10.5%	12 19.4%	5 10.9%	6 19.4%	4 22.2%	6 12.8%	3 15.0%	5 16.7%	3 20.0%	5 22.7%	10 14.5%
Yes, inflationary pressures are decreasing marketing spending levels	13 44.8%	5 33.3%	16 55.2% d	15 30.6% cG	8 42.1%	23 37.1% g	28 60.9% Df	15 48.4%	8 44.4%	22 46.8%	7 35.0%	8 26.7% h	4 26.7% h	7 31.8%	38 55.1% ef
No	10 34.5%	7 46.7%	7 24.1% D	27 55.1% CG	9 47.4%	27 43.5%	13 28.3% D	10 32.3%	6 33.3%	19 40.4%	10 50.0%	17 56.7% h	8 53.3%	10 45.5%	21 30.4% e

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**Do you believe there will be more, less or no change in amount of regulation for your company in 2025?**

N=251	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
3=More	69 27.5%	21 23.3% c	14 24.6% c	28 41.8% abD	5 14.3% C	24 25.8%	20 27.8%	14 35.0%	4 17.4%	4 28.6%	32 31.1%	36 24.8%
1=Less	79 31.5%	30 33.3%	17 29.8%	16 23.9% d	16 45.7% c	26 28.0%	25 34.7%	13 32.5%	6 26.1%	6 42.9%	31 30.1%	46 31.7%
2=No change	103 41.0%	39 43.3%	26 45.6%	23 34.3%	14 40.0%	43 46.2%	27 37.5%	13 32.5%	13 56.5%	4 28.6%	40 38.8%	63 43.4%
Mean	1.96	1.90 c	1.95	2.18 aD	1.69 C	1.98	1.93	2.03	1.91	1.86	2.01	1.93

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**Do you believe there will be more, less or no change in amount of regulation for your company in 2025?**

N=251

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
3=More	5 17.9% c	2 22.2%	12 44.4% amo	1 14.3%	1 20.0%	2 33.3%	10 35.7%	8 44.4% mo	11 40.7% mo	0 0.0%	5 33.3%	1 14.3%	6 15.8% chi	1 14.3%	4 15.4% chi
1=Less	13 46.4% h	2 22.2%	6 22.2% f	3 42.9%	1 20.0%	4 66.7% cgh	6 21.4% f	3 16.7% af	8 29.6%	1 33.3%	4 26.7%	4 57.1%	14 36.8%	3 42.9%	7 26.9%
2=No change	10 35.7%	5 55.6% f	9 33.3%	3 42.9%	3 60.0%	0 0.0% bmo	12 42.9%	7 38.9%	8 29.6% o	2 66.7%	6 40.0%	2 28.6%	18 47.4% f	3 42.9%	15 57.7% fi
Mean	1.71 cgh	2.00	2.22 am	1.71	2.00	1.67	2.14 a	2.28 alm	2.11	1.67	2.07	1.57 h	1.79 ch	1.71	1.88

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**Do you believe there will be more, less or no change in amount of regulation for your company in 2025?**

N=251	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
3=More	9 31.0%	1 6.7% fg	9 30.0%	11 22.4%	2 10.5% g	20 32.3% b	16 35.6% be	10 32.3%	5 27.8%	10 21.3% g	3 15.8% g	7 23.3% g	4 26.7%	11 52.4% cdeh	19 27.5% g
1=Less	9 31.0%	3 20.0%	8 26.7%	16 32.7%	9 47.4%	18 29.0%	16 35.6%	8 25.8% f	5 27.8%	12 25.5% f	4 21.1% f	13 43.3%	9 60.0% acdg	4 19.0% f	23 33.3%
2=No change	11 37.9% b	11 73.3% afG	13 43.3%	22 44.9%	8 42.1%	24 38.7% b	13 28.9% B	13 41.9%	8 44.4%	25 53.2% F	12 63.2% eFg	10 33.3% d	2 13.3% CD	6 28.6% d	27 39.1%
Mean	2.00	1.87	2.03	1.90	1.63 f	2.03 e	2.00	2.06	2.00	1.96	1.95	1.80 g	1.67 g	2.33 efh	1.94 g

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 1: Macroeconomic Forecasts**

**How will the change in regulation impact marketing spending levels in your company?**

N=148

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
It will increase marketing spending levels	26 17.6%	8 15.7%	5 16.1%	9 20.5%	4 19.0%	7 14.0%	9 20.0%	4 14.8%	2 20.0%	4 40.0%	13 20.6%	13 15.9%
It will decrease marketing spending levels	35 23.6%	8 15.7% c	9 29.0%	15 34.1% a	3 14.3%	10 20.0%	11 24.4%	6 22.2%	2 20.0%	2 20.0%	17 27.0%	17 20.7%
There will be no impact on marketing spending levels	87 58.8%	35 68.6% c	17 54.8%	20 45.5% a	14 66.7%	33 66.0%	25 55.6%	17 63.0%	6 60.0%	4 40.0%	33 52.4%	52 63.4%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**How will the change in regulation impact marketing spending levels in your company?**

N=148

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
It will increase marketing spending levels	5 27.8%	1 25.0%	2 11.1%	1 25.0%	1 50.0%	2 33.3%	1 6.3%	2 18.2%	3 15.8%	0 0.0%	2 22.2%	1 20.0%	3 15.0%	1 25.0%	1 9.1%
It will decrease marketing spending levels	2 11.1% G	0 0.0%	7 38.9% m	0 0.0%	1 50.0% m	2 33.3%	9 56.3% AilMo	4 36.4% m	4 21.1% g	0 0.0%	3 33.3%	0 0.0% g	1 5.0% ceGh	1 25.0%	1 9.1% g
There will be no impact on marketing spending levels	11 61.1%	3 75.0%	9 50.0%	3 75.0%	0 0.0% mo	2 33.3% m	6 37.5% mo	5 45.5%	12 63.2%	1 100.0%	4 44.4%	4 80.0%	16 80.0% efg	2 50.0%	9 81.8% eg

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 1: Macroeconomic Forecasts**

**How will the change in regulation impact marketing spending levels in your company?**

N=148

	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
It will increase marketing spending levels	5 27.8%	0 0.0%	2 11.8%	4 14.8%	2 18.2%	7 18.4%	6 18.8%	5 27.8%	1 10.0%	3 13.6%	0 0.0%	4 20.0%	3 23.1%	2 13.3%	7 16.7%
It will decrease marketing spending levels	4 22.2%	1 25.0%	5 29.4%	2 7.4% fg	0 0.0% fg	12 31.6% de	10 31.3% de	5 27.8%	2 20.0%	5 22.7%	1 14.3%	2 10.0% g	1 7.7% g	7 46.7% ef	12 28.6%
There will be no impact on marketing spending levels	9 50.0%	3 75.0%	10 58.8%	21 77.8% fg	9 81.8%	19 50.0% d	16 50.0% d	8 44.4%	7 70.0%	14 63.6%	6 85.7%	14 70.0%	9 69.2%	6 40.0%	23 54.8%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**By what percent are revenues in this market growing or decreasing in size?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	225	80	51	61	32	83	68	35	23	11	94	127
Mean	12.46	13.26	20.43	7.75	6.91	19.36	7.24	7.91	5.83	19.64	11.99	12.94
SD	27.89	26.35	44.24	11.79	15.52	40.10	16.71	13.05	14.11	21.87	16.24	34.44
			c	b		b	ae	e	e	bcd		

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**By what percent are revenues in this market growing or decreasing in size?**

	Industry Sector															
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O	
N		24	6	26	7	4	6	23	15	25	3	14	7	33	7	25
Mean	13.38	-3.83	5.92	8.57	9.50	46.83	13.04	12.47	4.60	7.00	12.50	22.00	27.45	2.86	3.76	
SD	13.91	8.91	15.60	6.63	25.16	75.48	31.65	14.43	21.21	11.27	14.67	25.72	45.01	14.36	8.13	
	BfO	Adhkl	flm	b		aciO		bo	fm		bo	bcO	cio		AFhLm	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**By what percent are revenues in this market growing or decreasing in size?**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
N	20	14	26	47	18	56	43	22	16	43	18	29	12	20	64
Mean	13.50	22.36	24.77	16.81	10.00	6.80	5.67	12.77	14.25	21.05	19.33	6.83	10.75	14.25	6.22
SD	17.49	41.78	43.03	38.14	15.87	13.78	12.59	15.71	13.32	41.00	22.43	11.52	9.14	56.53	14.84
	g	fg	FG			bC	abC			H	eH	d			CD

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

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

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Superior product quality	147 1.59 0.77	56 1.68 0.77	28 1.61 0.74	49 1.45 0.77	14 1.64 0.84	55 1.56 0.74	36 1.64 0.80	24 1.46 0.66	19 1.42 0.69	7 1.57 0.98	55 1.58 0.74	88 1.59 0.78
Superior innovation	84 1.94 0.81	36 1.81 0.82	19 1.89 0.88	23 2.13 0.76	6 2.17 0.75	36 1.75 0.81	25 2.04 0.79	9 2.22 0.83	6 2.17 0.75	4 2.50 1.00	33 2.00 0.83	50 1.90 0.81
Low price	126 1.98 0.85	42 1.93 0.89	25 2.12 0.88	40 1.95 0.78	18 2.00 0.91	41 2.15 0.82	38 1.82 0.90	23 2.09 0.79	13 2.00 0.82	7 2.00 1.00	58 2.02 0.87	66 1.94 0.86
Excellent service	111 2.06 0.74	36 2.06 0.75	34 2.06 0.74	16 2.25 0.68	25 1.96 0.79	42 2.21 0.72	32 1.97 0.74	18 1.89 0.83	11 2.27 0.79	5 1.80 0.45	41 2.00 0.74	69 2.10 0.75
Trusting relationship	128 2.16 0.77	48 2.25 0.76	41 2.05 0.84	20 2.40 0.60	18 1.94 0.80	59 2.08 0.79	34 2.24 0.78	18 2.06 0.80	7 2.86 0.38	8 2.00 0.53	54 2.11 0.79	71 2.20 0.75
Customer experience	115 2.27 0.76	38 2.32 0.77	17 2.12 0.78	37 2.27 0.77	22 2.27 0.77	34 2.21 0.81	37 2.27 0.73	20 2.50 0.76	11 1.91 0.70	8 2.25 0.89	48 2.21 0.80	67 2.31 0.74
Creating a positive impact on the world	15 2.67 0.62	5 2.40 0.55	4 3.00 0.00	4 3.00 0.00	2 2.00 1.41	9 2.67 0.71	2 3.00 0.00	2 2.00 0.00	2 3.00 0.00	0 --- ---	8 2.75 0.46	6 2.50 0.84

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

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

Number Mean SD	Industry Sector															
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
Superior product quality	15 1.93 0.88 c	4 1.00 0.00	21 1.29 0.72 adil	2 2.50 0.71 cgh	3 1.33 0.58	3 1.67 0.58	14 1.50 0.52 d	12 1.33 0.65 dl	22 1.91 0.87 c	1 2.00 ---	7 1.29 0.76	6 2.17 0.98 ch	15 1.60 0.63	6 1.50 0.84	16 1.44 0.73	
Superior innovation	6 1.83 0.75	2 3.00 0.00	14 2.36 0.63 m	0 --- ---	1 3.00 ---	1 3.00 ---	10 1.80 0.79	6 1.67 0.82	14 1.86 0.86	0 ---	4 2.00 0.82	1 1.00 ---	22 1.77 0.87 c	2 2.00 0.00	1 1.00 ---	
Low price	16 2.00 0.97	3 1.33 0.58	18 2.17 0.86	4 2.25 0.50 e	4 1.25 0.50 d	3 2.00 1.00	15 2.07 0.88	5 2.20 0.84	13 1.62 0.77	3 2.33 1.15	4 2.00 0.82	2 1.50 0.71	13 2.15 0.99	4 2.00 0.82	19 1.95 0.85	
Excellent service	17 2.06 0.75	5 2.20 0.84	4 1.75 0.96	5 1.40 0.89 mo	2 2.50 0.71	3 2.00 1.00	14 1.93 0.73	3 2.00 1.00	14 1.79 0.58 M	1 3.00 ---	10 2.20 0.63	5 2.20 1.10	13 2.46 0.66 dl	4 2.00 1.15	11 2.18 0.40 d	
Trusting relationship	19 2.05 0.78	4 2.00 0.82	8 2.25 0.46 j	3 2.00 1.00	3 2.33 0.58	3 1.00 0.00	16 2.25 0.86	9 2.44 0.73 j	10 2.60 0.70 j	3 1.33 0.58 chi	12 2.08 0.90	1 2.00 ---	25 2.12 0.73	3 2.33 0.58	9 2.33 0.87	
Customer experience	8 2.00 0.93	6 2.50 0.55	12 2.42 0.51	4 2.25 0.96	1 3.00 ---	3 2.33 0.58	14 2.43 0.85	9 2.22 0.67	11 2.55 0.69	0 ---	6 2.00 0.89	6 2.00 0.63	18 1.94 0.87	2 3.00 0.00	15 2.33 0.82	
Creating a Positive impact on the world	0 --- ---	0 --- ---	1 3.00 ---	0 --- ---	1 3.00 ---	2 3.00 0.00	1 1.00 ---	4 2.75 0.50	0 ---	1 2.00 ---	2 3.00 0.00	0 ---	2 2.50 0.71	0 ---	1 3.00 ---	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 2: Customers and Channels**

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

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Superior product quality	15 1.40 0.51	11 1.36 0.67	19 1.68 0.75	27 1.41 0.75	11 1.91 0.94	37 1.49 0.69	25 1.88 0.88	16 1.19 0.40	14 1.71 0.83	31 1.58 0.76	7 1.29 0.49	19 1.53 0.84	9 1.44 0.73	9 1.67 0.87	41 1.76 0.80
				g			d	bH	a						A
Superior innovation	9 1.67 0.87	4 2.00 0.82	13 2.08 0.95	16 1.75 0.77	6 2.50 0.84	13 2.08 0.76	21 1.90 0.77	10 1.80 0.79	5 2.20 1.10	18 1.94 0.87	7 1.86 0.90	8 2.50 0.76	3 2.67 0.58	8 1.50 0.53	25 1.84 0.75
												Gh	g	Ef	e
Low price	12 2.42 0.79	7 2.29 0.95	12 1.75 0.87	25 2.16 0.80	9 1.44 0.73	32 2.03 0.90	28 1.71 0.76	13 2.62 0.65	12 1.67 0.78	17 1.88 0.86	7 2.14 1.07	18 2.11 0.83	8 2.25 1.04	10 1.90 0.88	41 1.78 0.79
	Eg			eg	Ad		ad	BcgH	A	a				a	A
Excellent service	13 2.08 0.76	7 2.14 0.90	13 2.00 0.71	22 2.18 0.59	9 1.78 0.83	29 2.03 0.78	18 2.11 0.83	13 2.08 0.76	8 2.00 0.76	21 2.10 0.77	7 2.29 0.49	10 2.10 0.74	10 1.80 0.42	10 2.20 0.79	31 2.06 0.85
											f		d		
Trusting relationship	15 1.80 0.68	8 2.13 0.83	19 2.26 0.81	27 2.26 0.86	8 2.38 0.74	29 2.31 0.71	21 1.95 0.74	18 2.06 0.73	9 2.22 0.67	26 2.15 0.83	11 2.18 0.87	17 2.06 0.90	4 2.75 0.50	11 2.18 0.75	31 2.19 0.75
	f					a									
Customer experience	15 2.47 0.83	5 2.20 0.45	13 2.23 0.83	16 2.19 0.75	11 2.18 0.60	31 2.13 0.81	24 2.46 0.78	15 2.20 0.86	5 2.80 0.45	19 2.32 0.67	11 2.09 0.83	12 2.08 0.51	3 2.00 1.00	12 2.08 0.90	38 2.39 0.79
									e			b			
Creating a Positive impact on the world	2 3.00 0.00	3 2.67 0.58	1 2.00 ---	5 2.40 0.89	0 ---	3 3.00 0.00	1 3.00 ---	2 3.00 0.00	1 3.00 ---	6 2.67 0.52	1 2.00 ---	0 ---	2 2.00 1.41	3 3.00 0.00	0 ---

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**How well does your company perform on the customer's top priority of ... ? (1=Poorly - 7=Excellent)**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Superior product quality	86 6.06 0.77	28 6.14 0.76	15 6.20 0.56	35 5.89 0.83	8 6.25 0.89	32 5.94 0.80 b	20 6.45 0.69 aC	15 5.87 0.52 B	13 5.92 1.04	5 6.20 0.45	31 6.03 0.75	52 6.06 0.78
Superior innovation	30 5.67 0.96	16 5.50 1.15	8 6.13 0.64	5 5.60 0.55	1 5.00 ---	17 5.71 1.10	7 5.43 0.79	2 6.00 0.00	1 5.00 ---	1 5.00 ---	11 5.55 0.52	19 5.74 1.15
Low price	46 4.43 1.38	17 4.18 1.29	8 5.13 1.36	13 4.23 1.54	7 4.71 1.38	11 5.00 1.41	18 4.00 1.19	6 4.50 1.05	4 4.00 2.00	3 5.67 1.53	21 4.62 1.36	25 4.28 1.40
Trusting relationship	29 6.07 0.75	9 5.67 0.87	13 6.15 0.69	1 6.00 ---	6 6.50 0.55	16 6.19 0.75	7 6.00 0.82	5 5.80 0.84	0 ---	1 6.00 ---	14 5.93 0.83	14 6.21 0.70
Excellent service	27 5.56 0.93	9 5.22 0.97	8 5.88 1.13	2 6.00 0.00	8 5.50 0.76	7 5.29 1.11	9 5.11 0.60 c	7 6.14 1.07 b	2 6.00 0.00	1 6.00 ---	11 5.45 0.93	16 5.63 0.96
Customer experience	22 5.36 0.73	7 5.43 0.53	4 5.75 0.50	7 5.29 0.95	4 5.00 0.82	8 5.25 0.71	6 5.33 0.82	3 5.67 0.58	3 5.00 1.00	2 6.00 0.00	11 5.36 0.67	11 5.36 0.81

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

Breakouts are not reported for “Creating a positive impact on the world” give the small sample size.



**Topic 2: Customers and Channels**

**How well does your company perform on the customer's top priority of?... (1=Poorly - 7=Excellent)**

Number Mean SD	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Superior product quality	6 6.17 0.75	4 6.25 0.50	18 5.72 0.89	0 --- ---	2 6.00 0.00	1 6.00 ---	7 6.43 0.53	9 6.11 0.60	9 6.11 1.05	0 ---	6 6.33 0.82	2 7.00 0.00	7 6.00 0.58	4 5.50 0.58	11 6.09 0.83
Superior innovation	2 6.50 0.71	0 --- ---	1 5.00 ---	0 --- ---	0 --- ---	0 --- ---	4 6.25 0.50	3 5.67 0.58	6 5.33 0.52	0 ---	1 6.00 ---	1 6.00 ---	11 5.45 1.37	0 ---	1 6.00 ---
Low price	7 4.57 1.81	2 4.00 1.41	4 3.50 0.58	0 ---	3 7.00 0.00	1 3.00 ---	5 4.20 1.10	1 6.00 ---	7 4.00 1.15	1 3.00 ---	1 5.00 ---	1 4.00 ---	5 4.00 1.22	1 5.00 ---	7 4.86 1.21
Trusting relationship	5 6.40 0.55	1 7.00 ---	0 ---	1 7.00 ---	0 ---	3 5.67 0.58	4 6.25 0.50	1 5.00 ---	1 7.00 ---	2 5.00 0.00	4 6.50 0.58	0 ---	5 5.40 0.55	0 ---	2 6.50 0.71
Excellent service	4 6.00 1.15	1 6.00 ---	2 5.00 1.41	4 5.75 0.50	0 ---	1 5.00 ---	4 5.25 0.96	1 4.00 ---	4 5.75 0.96	0 ---	1 4.00 ---	2 6.00 0.00	1 6.00 ---	2 6.00 1.41	0 ---
Customer experience	3 5.33 0.58	0 ---	0 ---	1 5.00 ---	0 ---	0 ---	3 5.33 0.58	1 4.00 ---	1 5.00 ---	0 ---	2 6.00 0.00	1 6.00 ---	7 5.71 0.49	0 ---	3 4.67 1.15

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

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**Topic 2: Customers and Channels**

**How well does your company perform on the customer's top priority of...? (1=Poorly - 7=Excellent)**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Superior product quality	9 6.00 0.50	8 6.13 0.83	9 6.33 0.50	20 5.95 0.94	5 6.20 0.45	23 6.00 0.90	11 6.00 0.63	13 6.08 0.64	7 6.14 0.69	18 6.00 0.97	5 6.00 0.71	13 6.15 0.69	6 6.33 0.52	5 6.40 0.89	19 5.84 0.83
Superior innovation	5 6.40 0.55	1 6.00 ---	5 5.00 1.73	7 5.71 0.76	1 5.00 ---	3 6.33 0.58	7 5.43 0.53	4 6.50 0.58	2 4.00 2.83	7 5.57 0.53	3 6.00 1.00	1 5.00 ---	0 ---	4 6.00 0.82	9 5.56 0.53
	g					g	af	ch		a					a
Low price	2 7.00 0.00	2 5.50 2.12	5 3.60 0.89	6 4.83 0.75	6 4.50 1.52	12 4.08 1.44	13 4.31 1.25	1 7.00 ---	6 4.50 1.52	6 4.83 1.47	3 4.33 0.58	5 4.20 1.64	3 3.00 2.00	4 4.50 1.29	18 4.44 1.20
			d	c											
Trusting relationship	5 6.00 0.71	2 5.50 0.71	4 6.50 0.58	7 6.00 1.00	1 7.00 ---	4 5.50 0.58	6 6.33 0.52	4 6.00 0.82	1 6.00 ---	7 6.00 0.82	3 5.67 1.15	6 6.17 0.98	0 ---	2 6.50 0.71	6 6.17 0.41
			f			cg	f								
Excellent service	3 6.67 0.58	2 5.50 0.71	3 5.67 0.58	2 5.00 1.41	4 6.00 0.82	8 5.00 1.07	5 5.60 0.55	3 6.00 1.00	2 5.50 0.71	5 5.80 1.10	0 ---	2 6.50 0.71	2 5.00 0.00	2 4.00 0.00	10 5.60 0.84
	fg					a	a								
Customer experience	3 6.00 0.00	0 ---	3 5.33 0.58	3 5.00 1.00	1 6.00 ---	8 5.50 0.76	4 4.75 0.50	4 5.75 0.50	0 ---	2 4.50 0.71	3 5.67 0.58	1 6.00 ---	1 6.00 ---	4 5.00 1.15	7 5.29 0.49

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

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**Topic 2: Customers and Channels**

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

N=281	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Uses channel partners	187 66.5%	66 65.3% C	31 50.0% C	60 83.3% ABd	29 65.9% c	58 54.7% b	56 71.8% a	28 68.3%	19 73.1%	12 75.0%	84 73.7% b	100 61.3% a
Does not use channel partners	94 33.5%	35 34.7% C	31 50.0% C	12 16.7% ABd	15 34.1% c	48 45.3% b	22 28.2% a	13 31.7%	7 26.9%	4 25.0%	30 26.3% b	63 38.7% a

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

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

N=281

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Uses channel Partners	19 63.3%	6 60.0%	23 82.1% df	3 42.9% c	4 57.1%	2 33.3% cho	23 65.7%	15 78.9% f	24 75.0%	1 33.3%	8 53.3%	4 57.1%	28 63.6%	5 55.6%	22 75.9% f
Does not use channel Partners	11 36.7%	4 40.0%	5 17.9% df	4 57.1% c	3 42.9%	4 66.7% cho	12 34.3%	4 21.1% f	8 25.0%	2 66.7%	7 46.7%	3 42.9%	16 36.4%	4 44.4%	7 24.1% f

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

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

N=281

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Uses channel Partners	22 68.8%	10 66.7%	18 56.3%	35 63.6%	13 65.0%	47 66.2%	37 72.5%	23 69.7%	15 78.9%	31 58.5%	12 57.1%	19 61.3%	13 76.5%	18 75.0%	55 67.1%
Does not use channel Partners	10 31.3%	5 33.3%	14 43.8%	20 36.4%	7 35.0%	24 33.8%	14 27.5%	10 30.3%	4 21.1%	22 41.5%	9 42.9%	12 38.7%	4 23.5%	6 25.0%	27 32.9%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**What is the biggest challenge in managing your channel partners? (check the most important challenge)**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Improving data sharing between our company and partners	31 19.9%	9 15.8%	4 16.0%	13 25.5%	5 23.8%	7 15.2%	8 15.7%	9 33.3%	3 20.0%	3 30.0%	14 19.2%	17 21.3%
Building trust and loyalty with partners	29 18.6%	15 26.3%	7 28.0%	3 5.9%	3 14.3%	13 28.3%	10 19.6%	3 11.1%	2 13.3%	1 10.0%	16 21.9%	13 16.3%
Keeping channel costs low	28 17.9%	6 10.5%	1 4.0%	18 35.3%	2 9.5%	3 6.5%	7 13.7%	7 25.9%	5 33.3%	3 30.0%	9 12.3%	17 21.3%
Partners are growing in power	25 16.0%	10 17.5%	7 28.0%	6 11.8%	2 9.5%	10 21.7%	7 13.7%	3 11.1%	3 20.0%	0 0.0%	14 19.2%	11 13.8%
Ensuring consistency in how partners represent our brand	22 14.1%	9 15.8%	4 16.0%	5 9.8%	4 19.0%	7 15.2%	9 17.6%	3 11.1%	1 6.7%	1 10.0%	8 11.0%	13 16.3%
Getting quality products and/or services from partners	21 13.5%	8 14.0%	2 8.0%	6 11.8%	5 23.8%	6 13.0%	10 19.6%	2 7.4%	1 6.7%	2 20.0%	12 16.4%	9 11.3%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 2: Customers and Channels**

**What is the biggest challenge in managing your channel partners? (check the most important challenge)**

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Improving data sharing between our company and partners	2 13.3% j	2 50.0% o	5 21.7% h	1 50.0%	0 0.0%	0 0.0%	7 38.9% o	1 7.7% j	4 20.0%	1 100.0% ahmO	1 12.5%	2 50.0% o	3 13.6% j	1 33.3%	1 5.3% bgII
Building trust and loyalty with partners	3 20.0%	0 0.0%	3 13.0%	0 0.0%	1 50.0%	1 50.0%	2 11.1%	1 7.7%	6 30.0%	0 0.0%	3 37.5%	0 0.0%	7 31.8%	0 0.0%	2 10.5%
Keeping channel costs low	3 20.0% o	0 0.0% o	7 30.4% hm	0 0.0%	0 0.0%	0 0.0%	1 5.6% O	0 0.0% cO	4 20.0% o	0 0.0%	1 12.5% o	0 0.0% o	1 4.5% cO	0 0.0%	11 57.9% abGHikIM
Partners are growing in power	4 26.7% o	1 25.0% o	4 17.4%	0 0.0%	0 0.0%	1 50.0% O	2 11.1% h	6 46.2% gimO	2 10.0% h	0 0.0%	1 12.5%	1 25.0% o	3 13.6% h	0 0.0%	0 0.0% abFHI
Ensuring consistency in how partners represent our brand	2 13.3%	1 25.0%	2 8.7% n	1 50.0%	0 0.0%	0 0.0%	4 22.2%	1 7.7% n	3 15.0%	0 0.0%	1 12.5%	0 0.0%	3 13.6% n	2 66.7% chmo	2 10.5% n
Getting quality products and/or services from partners	1 6.7%	0 0.0%	2 8.7%	0 0.0%	1 50.0% i	0 0.0%	2 11.1%	4 30.8%	1 5.0% e	0 0.0%	1 12.5%	1 25.0%	5 22.7%	0 0.0%	3 15.8%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**What is the biggest challenge in managing your channel partners? (check the most important challenge)**

	Sales Revenue						Number of Employees								
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Improving data sharing between our company and partners	1 5.6%	0 0.0%	4 25.0%	8 28.6%	3 27.3%	5 12.5%	10 31.3%	2 10.5%	3 21.4%	4 15.4%	2 20.0%	4 25.0%	3 30.0%	3 20.0%	10 22.2%
Building trust and loyalty with partners	8 44.4%	2 22.2%	4 25.0%	5 17.9%	2 18.2%	4 10.0%	3 9.4%	4 21.1%	5 35.7%	8 30.8%	1 10.0%	4 25.0%	2 20.0%	0 0.0%	5 11.1%
Keeping channel costs low	3 16.7%	3 33.3%	2 12.5%	4 14.3%	2 18.2%	8 20.0%	5 15.6%	6 31.6%	2 14.3%	1 3.8%	2 20.0%	2 12.5%	3 30.0%	4 26.7%	8 17.8%
Partners are growing in power	2 11.1%	2 22.2%	1 6.3%	4 14.3%	1 9.1%	9 22.5%	6 18.8%	2 10.5%	2 14.3%	6 23.1%	0 0.0%	1 6.3%	2 20.0%	2 13.3%	10 22.2%
Ensuring consistency in how partners represent our brand	3 16.7%	0 0.0%	1 6.3%	4 14.3%	1 9.1%	8 20.0%	5 15.6%	4 21.1%	0 0.0%	1 3.8%	3 30.0%	3 18.8%	0 0.0%	2 13.3%	8 17.8%
Getting quality products and/or services from partners	1 5.6%	2 22.2%	4 25.0%	3 10.7%	2 18.2%	6 15.0%	3 9.4%	1 5.3%	2 14.3%	6 23.1%	2 20.0%	2 12.5%	0 0.0%	4 26.7%	4 8.9%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**What percent of your company’s sales occur online? Average levels**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
N	267	100	59	65	41	106	78	41	26	16	109	154
Mean	16.52	7.67	12.40	27.03	28.07	0.00	4.62	24.90	68.49	77.98	12.23	19.00
SD	26.03	16.60	24.73	28.38	33.17	0.00	3.25	8.65	10.73	10.73	21.66	27.91
		CD	CD	AB	AB		CDE	BDE	BCE	BCD	b	a

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**What percent of your company’s sales occur online? Average levels**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
N	27	8	26	7	7	6	31	18	31	3	15	7	44	9	28
Mean	15.55	36.00	27.31	14.71	36.28	10.33	3.23	4.61	6.13	5.33	8.87	43.71	21.45	4.11	27.28
SD	26.51	31.07	23.18	26.04	39.65	19.82	5.75	18.35	10.26	8.39	20.14	39.00	32.64	5.42	29.09
	gl	GHIKN	GHIKN	g	GhIkn		aBCdELMO	BCeLmO	BCElmo		bcelo	aGHlkn	Ghi	BCeLo	GHIkn

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 2: Customers and Channels**

**What percent of your company’s sales occur online? Average levels**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
N	31	15	30	55	20	68	45	32	18	53	20	31	15	23	74
Mean	24.58	23.00	14.10	17.89	21.05	13.10	11.24	29.93	6.39	21.09	16.55	12.55	26.60	6.91	12.70
SD	33.82	30.56	26.85	28.67	29.09	20.52	17.57	34.77	18.52	30.23	27.52	23.85	29.62	10.30	19.98
	fg					a	a	beGH	af	g		a	bGh	AcF	Af

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	170	59	44	44	22	65	52	26	15	10	67	101
Mean	11.39	7.39	6.69	21.48	11.68	8.04	7.94	17.76	24.13	17.18	8.11	13.39
SD	12.17	7.53	7.46	14.65	13.25	8.48	8.57	15.72	15.51	14.14	9.09	13.25
		C	C	ABd	c	CDE	CDE	AB	AB	AB	B	A

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
N	20	4	19	5	5	6	17	12	15	2	10	7	28	6	14
Mean	7.23	18.77	26.04	23.55	10.20	2.67	8.27	10.92	4.70	1.52	3.79	21.11	12.85	3.90	8.86
SD	6.28	15.45	16.41	14.93	5.93	2.73	10.58	6.54	5.73	2.09	4.22	14.80	11.82	3.46	8.83
	bCDL	afIkN AeFGHIKM		AFghIKno	cfk	bCDeHlm	Cdl	CdFiKn	BCDhLm		bCDeHLm	AfgIKno	Cfik	bCdhl	Cdl
			NO												

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
N	24	10	22	36	17	36	25	25	12	33	13	24	12	11	39
Mean	11.43	15.89	14.67	12.33	7.75	8.88	11.44	15.36	10.53	13.15	7.41	12.81	7.52	7.91	10.30
SD	10.67	14.61	16.00	12.21	7.41	11.33	12.26	14.29	11.54	12.80	11.27	12.82	7.30	9.61	12.02

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 3: Marketing Budgets**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	176	63	42	47	23	64	52	29	18	10	66	107
Mean	9.35	6.36	9.02	15.47	6.04	7.64	6.32	8.50	18.73	23.31	7.14	10.65
SD	13.25	11.03	14.83	14.64	8.65	12.72	10.24	10.98	17.33	16.26	11.33	14.10
		C	c	AbD	C	DE	DE	dE	ABc	ABC		

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
N	19	4	22	5	4	6	18	11	16	3	9	7	28	5	19
Mean	4.99	27.42	14.35	15.86	24.07	1.00	7.56	18.17	2.46	1.13	4.20	23.58	9.04	1.06	5.50
SD	6.31	21.02	15.17	19.43	18.96	0.89	12.91	19.69	4.85	0.23	6.23	19.52	10.05	0.55	7.40
	BcdEhL	AfgIKMnO	aflo	ai	AfgIkmnO	bcel	bel	alo	BCdEHLm		Bel	AfgIkMnO	BeiL	bel	BcEhL

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50- 99 B	100- 499 C	500- 999 D	1,000- 2,499 E	2,500- 4,999 F	5000- 9999 G	10,000+ H
N	23	10	20	37	19	40	26	24	12	36	12	23	13	13	42
Mean	17.01	21.47	8.26	8.52	7.27	7.19	4.94	19.16	7.47	12.79	4.90	8.55	5.67	4.06	6.04
SD	18.56	18.23	8.58	11.88	9.70	13.79	6.01	18.29	7.99	15.10	6.45	11.72	13.06	5.43	10.31
	defG	cDeFG	b	aB	ab	aB	AB	bdefGH	a	gh	a	a	a	Ac	Ac

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Overall marketing spending	183 3.31 17.20	64 2.45 19.65	45 4.25 14.29	50 5.21 16.64	23 1.21 15.77	69 4.09 20.02	53 2.54 15.15	31 1.26 10.50	18 2.61 12.00	9 7.85 32.16	70 1.98 14.15	110 4.16 19.09
Digital marketing spending	179 7.25 21.52	64 5.86 23.02	44 5.98 18.92	48 8.77 24.51	22 10.39 15.23	67 7.04 22.80	53 4.45 19.04	30 11.62 17.90	18 8.56 16.68	8 -1.25 34.51	69 4.39 15.81	107 9.06 24.63

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Overall marketing spending	20 7.05 11.74 fjk	4 6.50 9.15	24 7.39 16.14 fk	5 4.40 9.71	5 2.00 10.95	6 -11.26 23.56 ac	18 0.88 17.53	13 5.11 21.81	15 1.53 11.57	3 -12.52 26.14 a	10 -5.26 15.76 ac	7 2.43 17.97	30 8.18 21.15	6 3.50 3.99	17 -0.04 18.25
Digital marketing spending	20 9.45 13.64 f	4 8.38 8.79	23 14.57 20.78 f	5 8.60 9.86	5 8.00 10.95	6 -14.17 33.83 acg	18 9.72 15.05 f	13 0.77 28.93	15 4.00 9.25	3 0.00 22.91	9 1.67 3.54 n	7 7.14 31.60	29 8.69 30.49	6 8.00 7.69 k	16 8.25 23.90

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Overall marketing spending	24 3.17 25.33	11 8.39 16.60	22 2.07 20.51	37 6.14 16.40	18 -1.53 12.94	43 4.46 16.39	27 -0.33 9.11	25 -0.13 18.03	12 5.19 24.60	37 6.62 23.12	13 6.46 12.27	24 3.85 9.07	14 3.64 20.89	13 -0.35 17.13	44 1.69 11.85
Digital marketing spending	24 3.33 31.20	11 3.36 6.36	22 2.41 29.70	36 11.69 17.20	18 3.36 11.85	40 8.73 20.97	27 10.07 18.14	25 0.76 22.32	12 10.75 32.73	36 5.28 25.69	13 9.65 12.33	24 7.21 11.51	13 9.77 21.23	13 13.31 28.15	42 8.24 18.29

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

**Topic 3: 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%).**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Digital marketing spending	167 11.93 14.52	61 11.46 13.60	41 12.27 15.05	45 11.47 15.66	20 13.73 14.41	63 13.57 14.83	50 9.11 13.25	30 10.32 12.54	16 11.16 17.03	8 24.26 16.79	64 11.44 13.54	100 12.36 15.29
Overall marketing spending	172 8.93 12.87	60 7.65 12.48	43 9.45 11.92	49 10.71 13.72	20 7.29 14.13	67 10.14 14.28	51 6.72 11.00	29 5.38 6.88	15 7.88 12.94	9 25.49 15.55	64 9.02 11.50	105 8.94 13.83
Brand building	165 6.59 11.54	60 7.34 11.59	39 6.35 12.00	46 5.25 10.81	20 7.88 12.60	63 8.05 12.87	50 3.50 7.17	28 5.02 10.14	16 7.78 14.86	8 17.50 13.63	62 6.70 10.76	100 6.37 11.96
Customer relationship management	157 6.12 9.39	59 5.21 8.75	38 4.84 7.66	40 7.14 9.93	20 9.17 12.50	60 6.82 9.76	47 5.09 7.70	29 6.61 10.36	15 7.37 12.23	6 1.67 4.08	61 5.83 9.21	94 6.44 9.60
New product introductions	160 5.94 10.48	59 6.27 10.36	38 3.13 7.19	43 8.60 12.93	20 4.60 9.36	61 4.62 11.10	49 4.55 7.54	30 9.03 10.92	14 8.93 12.27	6 8.33 16.01	62 5.40 10.37	96 6.31 10.67
Customer experience spending	155 3.46 7.60	59 4.24 6.55	37 0.67 7.97	39 3.30 6.70	20 6.67 9.98	59 3.94 9.02	47 3.14 6.90	28 2.89 4.55	15 4.38 9.57	6 1.67 4.08	59 3.43 7.78	93 3.38 7.44
New service introductions	156 2.78 6.18	58 2.21 5.13	39 3.23 7.20	39 2.31 5.81	20 4.45 7.52	61 3.18 7.06	47 2.02 4.57	28 2.82 6.41	14 3.93 7.39	6 1.67 4.08	61 2.62 6.08	93 2.94 6.33
Traditional advertising spending	166 -0.32 11.23	59 0.55 11.09	40 0.42 7.97	47 -2.68 13.12	20 1.20 12.37	63 0.53 10.28	51 -0.35 8.02	29 -4.95 13.35	16 -0.11 14.79	7 10.97 14.10	63 0.17 9.96	100 -0.98 11.74

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

**Topic 3: 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%).**

Number Mean SD	Industry Sector															
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
Digital marketing spending	15 12.97 12.83	4 8.75 2.50	22 13.11 14.49	5 7.00 6.71	5 11.00 10.25	6 15.75 17.83	16 13.69 17.69	12 19.63 18.84	16 5.75 7.05	2 15.00 14.14	9 5.00 8.66	6 8.50 17.42	28 14.32 15.83	6 10.00 8.94	15 10.44 18.57	
Overall marketing spending	18 7.69 12.03	4 8.00 4.00	23 9.31 12.45	5 5.20 5.22	5 5.00 7.07	6 11.20 18.04	17 9.98 18.89	13 15.26 15.49	15 3.20 5.86	2 7.50 10.61	9 6.67 7.50	6 11.83 12.34	29 12.21 15.87	6 5.67 5.89	14 5.93 8.74	
Brand building	16 7.85 10.10	4 8.00 9.09	22 5.42 11.28	5 0.00 7.91	5 6.00 15.17	6 7.60 13.93	16 1.18 13.12	12 6.67 9.13	15 2.87 5.89	2 5.00 7.07	8 5.63 6.78	6 13.77 15.23	28 10.47 15.02	6 9.17 12.42	14 7.64 9.16	
Customer relationship management	14 8.90 13.26	3 0.67 1.15	21 2.86 4.89	5 11.40 9.74	5 0.00 0.00	6 6.67 10.33	15 5.33 6.87	11 8.43 9.96	16 3.74 8.99	2 5.00 7.07	9 3.44 5.53	5 9.96 14.48	27 6.95 9.63	6 8.67 12.68	12 9.48 12.16	
New product introductions	15 6.67 8.16	3 1.33 1.15	23 6.39 10.68	5 7.99 17.87	5 2.00 4.47	6 0.00 5.48	16 5.94 11.39	11 9.08 18.94	16 5.00 5.77	2 5.00 7.07	9 3.00 4.30	5 7.00 4.47	27 8.70 12.82	6 -0.83 2.04	11 6.64 9.08	
Customer experience spending	14 5.69 9.55	3 2.67 2.52	21 1.67 3.65	5 2.80 4.38	5 0.00 0.00	6 5.28 12.94	15 0.59 12.27	11 5.00 9.49	15 2.53 3.72	2 2.50 3.54	8 1.38 2.26	5 3.60 4.16	27 5.62 8.55	6 2.00 4.00	12 5.75 7.35	
New service introductions	14 4.64 7.71	3 2.33 2.52	21 0.57 2.20	5 0.40 0.89	5 6.00 8.94	6 0.83 6.65	15 3.67 8.91	11 1.82 6.03	15 2.20 5.25	2 0.00 0.00	10 2.60 6.74	5 5.00 5.00	27 5.00 6.94	6 -0.83 4.92	11 2.09 4.59	
Traditional advertising spending	16 2.50 6.32	3 -7.67 15.04	23 -6.19 13.51	5 2.00 7.58	5 6.36 15.88	6 1.97 15.41	16 -0.51 12.37	12 4.73 11.74	15 -3.40 8.31	2 -5.00 0.00	9 -2.22 3.63	6 2.50 4.18	27 -0.20 11.88	6 -0.50 3.39	15 3.00 13.38	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: 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%).**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Digital marketing spending	23 16.87 17.27	11 6.55 8.79	18 18.00 15.99	35 12.37 13.64	18 9.42 14.05	35 8.63 15.29	26 11.12 12.00	23 14.07 16.21	11 15.55 18.00	35 14.73 14.86	11 10.91 12.81	23 10.46 12.94	11 13.14 15.90	11 13.14 18.65	41 7.76 12.02
		c	bf			c				h					c
Overall marketing spending	23 14.20 15.26 G	11 9.20 13.77	21 11.20 19.05	35 9.32 11.92 g	18 8.42 13.59	38 7.87 10.09	25 3.64 5.67 Ad	23 11.50 13.68 H	12 9.52 15.11	36 13.64 15.47 H	12 7.31 18.76	24 7.69 10.54	13 10.94 13.07 h	11 6.27 8.67	40 4.45 7.34 ACf
Brand building	22 9.35 11.94 g	11 5.05 10.66	18 8.78 14.74	36 6.92 11.08	18 9.31 12.63	35 5.11 10.76	24 2.58 9.69 a	22 6.14 9.25	11 3.99 15.05	36 11.19 13.20 H	11 8.29 14.72	23 5.35 7.98	12 6.25 8.82	11 11.42 13.35 h	38 2.24 9.82 Cg
Customer relationship management	21 9.30 12.58 b	11 1.36 3.23 a	18 7.38 9.44	33 7.56 11.16	17 3.00 6.83	33 5.75 9.07	24 5.29 6.17	21 4.57 6.85	11 5.89 10.62	32 8.10 11.76	11 6.98 12.95	22 5.09 8.26	9 6.67 7.91	11 7.25 10.28	39 5.31 8.09
New product introductions	21 11.14 15.64 Dg	11 4.09 4.91	18 7.50 11.14	33 2.58 7.19 Aef	18 9.27 13.56 dg	34 6.65 8.38 d	25 2.36 8.07 ae	21 9.47 13.86	11 5.91 9.17	32 4.53 10.03	11 7.00 13.37	23 8.26 10.18	10 4.50 6.43	11 4.36 12.55	40 4.42 8.85
Customer experience spending	21 6.00 9.00	11 1.36 3.23	18 6.30 10.56	32 2.80 6.82	17 2.18 3.91	33 2.13 6.77	23 3.73 8.77	21 3.86 7.03	11 3.18 7.17	31 5.46 9.16	11 4.06 10.40	22 1.41 3.46	10 4.80 7.48	11 4.09 4.91	37 1.97 8.21
New service introductions	22 4.36 8.47	11 1.82 3.37	18 4.45 6.84	32 3.06 6.44	17 1.59 4.23	33 2.52 5.12	23 1.26 6.38	22 3.46 6.60	11 6.37 10.27	31 3.06 5.58	11 2.00 7.49	22 2.41 4.53	9 2.22 4.41	11 2.55 5.13	38 1.68 6.13
Traditional advertising spending	21 -1.76 12.26	11 4.25 9.93 g	18 -0.55 14.22	36 -0.03 9.55	18 2.71 9.10 g	37 0.87 9.54 g	25 -5.31 13.51 bef	21 -1.61 9.70	11 -5.79 10.34 f	35 2.30 14.37	11 0.82 4.07	23 0.52 11.09	12 3.33 9.61 b	11 0.27 6.39	41 -2.55 11.72

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
...of your marketing budget do you currently spend on social media?	172 11.29 11.24	60 7.42 7.85 C	44 8.11 8.63 C	48 19.24 13.58 ABd	20 10.83 9.54 c	66 8.50 8.81 D	50 11.67 11.62 d	30 12.15 9.53 d	16 20.15 16.07 Abc	8 13.77 13.98	63 8.73 8.47 b	106 12.75 12.38 a
...will you spend in the next 12 months?	171 13.34 12.20	60 9.28 8.60 C	43 10.20 10.53 C	48 21.49 14.13 ABd	20 12.70 11.00 c	65 10.88 9.93 D	50 13.38 12.48 d	30 14.73 11.82	16 21.30 16.23 Ab	8 14.62 15.33	62 10.79 9.18 b	106 14.86 13.55 a
...do you predict you will spend in five years?	171 18.37 15.29	60 13.95 12.05 C	43 14.38 13.54 C	48 27.74 16.59 ABd	20 17.69 15.33 c	65 16.03 13.91 d	50 17.84 14.64	30 20.99 15.24	16 25.61 19.04 a	8 18.99 20.42	62 14.69 12.14 b	106 20.66 16.68 a

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
...of your marketing budget do you currently spend on social media?	19 8.00 6.87 bCl	4 19.41 17.06 agi	23 21.76 14.84 AGhIkMno	5 9.20 7.66	5 9.60 9.66	6 9.17 5.85	16 6.28 6.23 bCl	12 10.09 11.55 c	15 6.53 8.41 bCl	2 12.50 3.54	9 9.44 7.68 c	6 17.19 14.40 agi	28 10.94 11.54 C	6 7.17 9.45 c	16 11.31 10.01 c
...will you spend in the next 12 months?	19 10.00 9.07 C	4 21.49 18.39 g	23 24.21 15.00 AGhIkMno	5 10.20 7.29	5 11.20 13.42	6 12.50 10.37	15 9.23 6.98 bC	12 11.41 11.86 c	15 7.87 9.86 C	2 12.50 3.54	9 11.11 9.61 c	6 18.33 15.89	28 13.00 11.78 C	6 7.17 9.45 c	16 14.44 11.95 c
...do you predict you will spend in five years?	19 16.42 14.94 C	4 30.73 20.40 giAdefGIkMN	23 31.81 17.53 o	5 10.60 7.54 c	5 10.20 13.97 c	6 14.67 9.20 c	15 13.90 10.44 bC	12 19.83 17.67	15 11.40 11.67 bCo	2 12.50 3.54	9 16.44 14.49 c	6 23.33 17.80	28 16.57 14.75 C	6 10.33 10.13 C	16 20.38 12.53 ci

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 3: Marketing Budgets**

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

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
...of your marketing budget do you currently spend on social media?	23 14.41 14.23	11 7.82 9.51	21 10.24 11.31	37 10.93 9.82	18 10.65 10.57	36 10.32 10.95	25 13.61 12.06	23 16.23 14.02	13 9.15 8.78	37 10.66 12.13	12 9.30 11.49	23 10.01 8.75	12 7.58 6.27	12 16.83 12.26	39 10.14 10.70
...will you spend in the next 12 months?	23 16.60 15.12	11 9.18 8.80	20 15.15 12.37	37 12.27 10.37	18 12.83 10.71	36 11.60 12.43	25 15.64 13.63	23 17.69 14.37 f	13 12.54 9.77	36 13.89 13.23	12 10.00 12.52	23 12.13 8.85	12 7.92 6.73	12 19.58 14.15	39 11.73 12.21
...do you predict you will spend in five years?	23 24.50 21.12	11 11.55 10.54	20 20.30 12.97	37 16.38 13.05	18 17.27 14.49	36 16.57 14.00	25 21.03 17.04	23 23.90 17.90 f	13 19.92 14.75	36 18.47 16.37	12 14.33 17.70	23 16.65 11.00	12 10.25 7.65	12 25.67 14.23	39 16.70 15.43

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: 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)**

N=228	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Demonstrating the impact of marketing actions on financial outcomes	64.0%	65.4%	76.9% cd	54.8% b	56.3% b	68.3%	62.5%	63.2%	54.5%	66.7%	67.0%	62.6%
Focusing data and analytics on the most important marketing problems	51.8%	46.9%	46.2%	58.1%	62.5%	46.3%	56.3%	50.0%	68.2%	46.7%	47.9%	54.2%
Linking marketing investments to important business objectives	41.2%	44.4%	38.5%	40.3%	40.6%	40.2%	42.2%	39.5%	40.9%	46.7%	44.7%	38.9%
Leveraging technology to improve customer value	37.7%	32.1%	32.7%	45.2%	46.9%	32.9%	37.5%	47.4%	50.0%	26.7%	31.9%	41.2%
Communicating the role of the brand in business decisions	37.3%	38.3%	44.2%	33.9%	31.3%	42.7% e	37.5%	47.4% e	22.7%	13.3% ac	36.2%	37.4%
Securing cross-functional support for new marketing investments	34.6%	42.0%	32.7%	30.6%	28.1%	37.8%	28.1%	39.5%	45.5%	26.7%	37.2%	33.6%
Infusing customer's point of view in business decisions	24.1%	28.4%	17.3%	19.4%	34.4%	23.2%	23.4%	26.3%	31.8%	20.0%	26.6%	21.4%
Using business terminology that resonates outside of the marketing function	12.7%	12.3%	9.6%	16.1%	12.5%	9.8%	17.2%	18.4%	13.6%	0.0%	11.7%	13.7%
Significance Tests Between Columns:	Lower case: p<.05	Upper case: p<.01										

**Topic 4: 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)**

N=228

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Demonstrating the impact of marketing actions on financial outcomes	72.0% l	87.5% l	52.0%	33.3%	60.0%	83.3%	70.8%	72.2%	69.6%	66.7%	69.2%	28.6% ab	62.9%	50.0%	58.3%
Focusing data and analytics on the most important marketing problems	72.0% Emo	62.5% e	56.0% e	50.0%	0.0% Abcgin	33.3%	54.2% e	50.0%	52.2% e	66.7%	53.8%	42.9%	45.7% a	66.7% e	41.7% a
Linking marketing investments to important business objectives	44.0%	37.5%	40.0%	33.3%	40.0%	50.0%	33.3% ij	38.9%	65.2% gmo	100.0% gmo	38.5%	28.6%	37.1% ij	33.3%	33.3% ij
Communicating the role of the brand in business decisions	40.0%	50.0%	36.0%	50.0%	0.0% g	16.7%	54.2% eh	16.7% gi	47.8% h	66.7%	46.2%	28.6%	28.6%	33.3%	37.5%
Securing cross-functional support for new marketing investments	40.0%	25.0%	44.0%	0.0%	60.0%	50.0%	29.2%	27.8%	39.1%	66.7%	30.8%	42.9%	37.1%	16.7%	25.0%
Leveraging technology to improve customer value	36.0%	50.0%	44.0%	66.7% f	20.0%	0.0% dhlo	33.3%	55.6% fm	30.4%	33.3%	38.5%	57.1% f	25.7% h	33.3%	45.8% f
Infusing customer's point of view in business decisions	32.0% o	12.5%	32.0% o	16.7%	0.0%	33.3%	16.7%	16.7%	17.4%	66.7% o	46.2% o	28.6%	31.4% o	16.7%	8.3% acjkm
Using business terminology that resonates outside of the marketing function	8.0%	12.5%	16.0%	0.0%	40.0% lk	0.0%	25.0% i	5.6%	0.0% EgJmo	33.3% lk	0.0% ej	0.0%	20.0% i	16.7%	16.7% i
Significance Tests Between Columns:	Lower case: p<.05		Upper case: p<.01												



**Topic 4: 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)**

N=228

	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Demonstrating the impact of marketing actions on financial outcomes	62.5%	53.3%	55.2% e	70.2%	84.2% c	61.1%	61.5%	53.8%	72.2%	64.4%	72.2%	70.0%	76.9%	53.3%	59.7%
Focusing data and analytics on the most important marketing problems	37.5%	60.0%	48.3%	51.1%	63.2%	48.1%	59.0%	46.2%	61.1%	51.1%	44.4%	56.7%	46.2%	53.3%	51.6%
Communicating the role of the brand in business decisions	33.3%	26.7%	37.9%	34.0%	36.8%	38.9%	46.2%	26.9% h	50.0% e	35.6%	22.2% h	20.0% bgH	30.8%	53.3% e	50.0% adE
Leveraging technology to improve customer value	33.3%	33.3%	27.6%	34.0%	36.8%	44.4%	43.6%	30.8%	27.8%	28.9% e	33.3%	56.7% c	30.8%	46.7%	41.9%
Linking marketing investments to important business objectives	33.3%	53.3%	41.4%	36.2% e	63.2% d	42.6%	35.9%	30.8% f	61.1%	40.0%	27.8% f	40.0%	69.2% adh	53.3%	35.5% f
Securing cross-functional support for new marketing investments	29.2%	26.7%	31.0%	38.3%	31.6%	33.3%	41.0%	26.9%	27.8%	44.4%	38.9%	23.3%	15.4%	46.7%	37.1%
Infusing customer's point of view in business decisions	16.7%	20.0%	24.1%	29.8%	10.5%	29.6%	23.1%	23.1%	5.6% fg	22.2%	27.8%	23.3%	38.5% b	33.3% b	24.2%
Using business terminology that resonates outside of the marketing function	12.5%	0.0%	13.8%	12.8%	15.8%	9.3%	20.5%	7.7%	22.2%	6.7%	16.7%	10.0%	7.7%	6.7%	19.4%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

 **Topic 4: Marketing Leadership**

**Which of the following do you believe should be the most important objective for the marketing function in 2025? (1=Most Important)**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Maximize company profitability	75 1.89 0.80	27 2.00 0.83 b	19 1.53 0.70 ac	17 2.06 0.83 b	12 2.00 0.74	28 1.86 0.80	18 1.67 0.69	11 2.09 0.83	9 1.67 0.87	7 2.29 0.76	25 1.80 0.87	48 1.96 0.77
Define and deliver value that customers want and consider fair	92 2.03 0.86	31 1.77 0.80 b	23 2.30 0.82 a	26 2.12 0.91	12 2.00 0.85	27 2.07 0.92	28 1.96 0.79	19 2.11 0.88	10 2.00 0.94	4 2.00 0.82	38 1.82 0.83	52 2.15 0.85
Innovate and grow the company	131 1.89 0.82	53 1.79 0.86	29 2.07 0.84	36 1.92 0.77	13 1.77 0.73	52 1.96 0.86	39 1.79 0.83	21 1.90 0.77	8 1.75 0.71	8 2.13 0.83	60 1.88 0.83	70 1.89 0.83
Build, maintain, and/or repair our brand reputation	94 1.95 0.79	31 2.23 0.80 bc	22 1.77 0.69 a	26 1.77 0.82 a	14 1.93 0.83	31 1.90 0.79	30 2.13 0.82	15 1.80 0.77	8 1.88 0.99	7 1.71 0.49	41 2.00 0.81	51 1.92 0.80
Attract investors and/or business partners	25 2.36 0.76	7 1.86 0.69 d	6 2.17 0.75	5 3.00 0.00	6 2.83 0.41 a	9 2.22 0.83	9 2.44 0.88	2 2.00 0.00	3 2.33 0.58	2 3.00 0.00	8 2.25 0.89	17 2.41 0.71
Define and defend our market position relative to competition	103 1.96 0.78	42 2.17 0.76 C	26 2.00 0.80 c	27 1.56 0.58 Abd	8 2.13 0.99 c	40 1.98 0.73	31 2.10 0.79	20 1.85 0.81	4 2.25 0.96	4 1.50 1.00	45 2.16 0.74 b	57 1.82 0.78 a
Maximize the efficiency of marketing spending	109 2.08 0.82	35 2.00 0.80	20 2.15 0.88	32 2.22 0.79	21 1.90 0.83	39 2.03 0.81	27 2.07 0.83	18 2.22 0.88	15 2.07 0.80	6 1.83 0.98	46 2.15 0.82	63 2.03 0.82
Cut marketing costs; reduce budget	6 2.17 0.98	2 1.50 0.71	2 2.00 1.41	1 3.00 ---	1 3.00 ---	2 2.00 1.41	4 2.25 0.96	0 ---	0 ---	0 ---	2 1.50 0.71	4 2.50 1.00
Invest in new talent and/or capabilities	54 2.17 0.84	18 2.33 0.77	12 2.08 0.90	10 2.40 0.84	12 1.92 0.90	21 2.24 0.83	11 2.00 0.89	8 2.13 0.99	9 2.33 0.71	4 2.00 1.15	17 2.24 0.83	36 2.11 0.85

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

**Which of the following do you believe should be the most important objective for the marketing function in 2025? (1=Most Important)**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Maximize company profitability	4 1.75 0.96	3 2.00 1.00	7 2.29 0.76	2 1.50 0.71	3 2.00 1.00	2 2.50 0.71	7 2.29 0.76	5 1.40 0.55	4 2.00 0.82	1 1.00 ---	5 1.40 0.55	4 1.75 0.96	13 2.00 0.91	4 1.50 0.58	11 1.91 0.83
Define and deliver value that customers want and consider fair	13 2.23 0.73	4 2.25 0.96	8 2.50 0.76	1 2.00 ---	2 2.00 1.41	3 2.00 1.00	10 1.40 0.70	8 1.75 0.89	10 1.60 0.84	1 3.00 ---	5 3.00 0.00	0 ---	12 1.75 0.75	2 2.50 0.71	13 2.23 0.93
Innovate and grow the company	14 2.00 0.88	1 2.00 ---	16 1.75 0.77	1 1.00 ---	3 2.00 0.00	4 1.00 0.00	14 2.07 0.73	9 2.33 0.87	14 2.14 0.86	2 1.50 0.71	10 1.60 0.70	6 2.00 0.89	23 1.70 0.93	4 2.00 1.15	10 2.00 0.67
Build, maintain, and/ or repair our brand reputation	8 1.88 0.83	3 2.33 0.58	11 1.91 0.83	2 3.00 0.00	0 ---	3 1.67 0.58	11 1.91 0.83	6 2.50 0.84	11 2.09 0.94	1 3.00 ---	6 1.50 0.55	4 1.25 0.50	13 2.00 0.58	3 2.00 1.00	12 1.75 0.87
Attract investors and/or business partners	5 2.20 0.84	2 3.00 0.00	4 2.75 0.50	0 ---	1 2.00 ---	1 3.00 ---	3 2.33 1.15	1 1.00 ---	1 3.00 ---	0 ---	1 3.00 ---	0 ---	4 2.25 0.50	0 ---	2 1.50 0.71
Define and defend our market position relative to competition	10 1.70 0.67	3 1.00 0.00	14 1.71 0.73	2 2.00 1.41	2 3.00 0.00	3 2.67 0.58	8 1.88 0.83	12 1.75 0.75	12 1.92 0.79	2 2.00 1.41	5 2.20 0.84	0 ---	19 2.32 0.75	3 2.33 0.58	8 1.88 0.64
Maximize the efficiency of marketing spending	14 2.00 0.88	3 2.00 1.00	12 1.92 0.90	5 2.00 1.00	3 1.00 0.00	1 2.00 ---	14 1.93 0.83	7 2.43 0.53	11 2.00 0.77	2 2.00 0.00	3 3.00 0.00	5 2.60 0.55	17 2.12 0.86	0 ---	12 2.25 0.87
Cut marketing costs; reduce budget	1 3.00 ---	0 ---	0 ---	0 ---	0 ---	1 3.00 ---	1 2.00 ---	1 1.00 ---	0 ---	0 ---	1 1.00 ---	0 ---	0 ---	1 3.00 ---	0 ---
Invest in new talent and/or capabilities	9 2.00 1.00	2 1.50 0.71	6 2.17 0.98	2 2.00 0.00	1 3.00 ---	0 ---	7 2.71 0.76	2 2.50 0.71	6 2.17 0.75	0 ---	3 2.33 0.58	2 2.50 0.71	7 2.14 0.90	1 1.00 ---	6 1.83 0.98

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Which of the following do you believe should be the most important objective for the marketing function in 2025? (1=Most Important)**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Maximize company profitability	11 2.27 0.79 d	4 1.50 1.00	13 2.23 0.73 d	14 1.57 0.65 ac	7 1.71 0.76	16 1.75 0.77	9 1.89 0.93	10 2.00 0.82	7 2.14 0.69	12 2.08 0.90	9 1.78 0.67	10 1.60 0.84	6 1.83 0.41	5 1.40 0.89	16 2.00 0.89
Define and deliver value that customers want and consider fair	10 1.70 0.82 f	7 2.29 0.95	12 1.92 0.90	16 1.94 0.93	6 2.17 0.75	22 2.32 0.78	18 1.89 0.90	13 1.92 0.86	7 1.57 0.79	16 2.06 0.93	7 2.29 0.95	8 2.00 0.76	4 2.00 0.82	6 2.83 0.41 aBeh	31 1.97 0.87 g
Innovate and grow the company	16 1.94 0.85	9 1.56 0.53	14 1.79 0.89	30 2.07 0.78 f	11 2.09 0.83	24 1.58 0.83 d	26 2.04 0.82	17 1.94 0.83	9 1.56 0.88 e	25 1.96 0.73	12 1.83 0.94	17 2.24 0.75 bg	4 1.75 0.96	11 1.55 0.82 e	35 1.89 0.83
Build, maintain, and/or repair our brand reputation	8 2.38 0.52 ce	4 2.50 1.00	6 1.67 0.52 a	21 1.81 0.81	10 1.60 0.84 a	27 2.04 0.76	18 1.94 0.87	6 2.33 0.52	7 2.29 0.76	17 1.65 0.79	4 2.00 0.82	16 2.00 0.82	8 1.75 0.71	6 2.00 1.10	29 1.97 0.82
Attract investors and/or business partners	8 1.88 0.83	2 2.50 0.71	5 2.40 0.55	4 2.75 0.50	3 3.00 0.00	3 2.33 1.15	0 --- ---	10 2.00 0.82	1 2.00 ---	6 2.67 0.52	2 2.50 0.71	2 3.00 0.00	3 2.33 1.15	0 --- ---	1 3.00 ---
Define and defend our market position relative to competition	8 1.63 0.74	6 2.17 0.98	15 2.33 0.82	16 2.13 0.81	8 1.50 0.53	28 1.93 0.72	21 1.90 0.77	9 1.56 0.88	9 2.44 0.73	19 2.11 0.81	8 2.00 0.93	11 1.64 0.67	8 2.00 0.93	8 2.00 0.53	30 1.90 0.71
Maximize the efficiency of marketing spending	10 2.00 0.94	6 2.00 0.63	15 1.80 0.77 e	23 2.04 0.88	9 2.56 0.73 c	23 2.13 0.87	22 2.14 0.77	9 2.00 0.87	12 2.00 0.85	21 2.00 0.77	7 2.00 0.82	15 2.20 0.94	5 2.20 1.10	7 2.43 0.53	33 2.06 0.83
Cut marketing costs; reduce budget	0 --- ---	1 1.00 ---	2 2.00 1.41	0 --- ---	0 --- ---	2 3.00 0.00	1 2.00 ---	0 --- ---	0 --- ---	3 1.67 1.15	0 --- ---	0 --- ---	1 3.00 ---	0 --- ---	2 2.50 0.71
Invest in new talent and/or capabilities	9 2.11 0.93	6 2.17 0.75	5 1.80 1.10	11 2.27 0.79	0 --- ---	14 2.14 0.86	8 2.25 0.89	12 2.25 0.87	2 2.00 1.41	16 2.00 0.89	2 2.50 0.71	2 1.50 0.71	3 2.33 1.15	2 2.00 0.00	15 2.33 0.82

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



## Topic 4: Marketing Leadership

### Which of the following do you think your leadership believes should be the most important objective for the marketing function in 2025? (1=Most Important)

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Maximize company profitability	138 1.80 0.84	45 1.82 0.89	33 1.73 0.84	40 1.70 0.79	19 2.05 0.78	43 2.00 0.90 d	41 1.88 0.87 d	23 1.70 0.76	15 1.33 0.62 ab	9 1.78 0.67	60 1.83 0.83	75 1.77 0.85
Define and deliver value that customers want and consider fair	61 2.07 0.81	23 2.13 0.81	10 2.20 0.92	13 1.85 0.80	14 2.07 0.83	22 2.27 0.83 c	18 2.11 0.68	12 1.58 0.79 ad	4 2.75 0.50 c	4 1.75 0.96	30 2.10 0.84	31 2.03 0.80
Innovate and grow the company	125 1.74 0.80	51 1.69 0.84	29 1.90 0.82	31 1.71 0.74	14 1.71 0.83	47 1.66 0.81	34 1.74 0.79	22 1.73 0.83	11 1.82 0.60	10 2.20 0.92	50 1.68 0.84	73 1.78 0.77
Build, maintain, and/or repair our brand reputation	61 1.97 0.86	19 2.26 0.87 D	18 1.89 0.76	14 2.14 0.95 d	9 1.33 0.50 Ac	24 2.08 0.78	17 1.71 0.92	10 2.10 0.88	7 2.29 0.95	3 1.33 0.58	26 2.00 0.85	35 1.94 0.87
Attract investors and/or business partners	28 1.93 0.81	6 1.33 0.52 d	6 1.83 0.98	8 2.13 0.83	7 2.29 0.76 a	10 2.10 0.74	8 1.63 0.92	3 3.00 0.00	4 1.50 0.58	2 1.50 0.71	5 2.00 0.71	23 1.91 0.85
Define and defend our market position relative to competition	90 2.31 0.74	34 2.44 0.70	23 2.35 0.71	22 2.14 0.83	11 2.18 0.75	36 2.14 0.80 b	22 2.59 0.67 a	16 2.44 0.63	8 2.13 0.64	4 2.50 1.00	36 2.28 0.78	54 2.33 0.73
Maximize the efficiency of marketing spending	113 2.12 0.75	36 2.00 0.63 c	26 2.04 0.82	34 2.38 0.70 a	16 2.00 0.89	43 2.00 0.76 D	31 2.03 0.71 D	16 2.06 0.77 d	13 2.69 0.63 ABce	7 2.00 0.82 d	45 2.04 0.71	66 2.15 0.79
Cut marketing costs; reduce budget	47 2.11 0.76	21 2.00 0.71	9 2.11 0.78	13 2.23 0.83	4 2.25 0.96	15 1.80 0.68 c	20 2.10 0.79	4 2.75 0.50 a	3 2.00 1.00	2 2.50 0.71	22 2.27 0.77	24 2.00 0.72
Invest in new talent and/or capabilities	23 2.52 0.67	8 2.63 0.52	5 2.60 0.55	5 2.20 0.84	5 2.60 0.89	9 2.56 0.73	6 2.50 0.55	5 2.60 0.55	1 1.00 ---	1 3.00 ---	8 2.63 0.52	14 2.50 0.76

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Which of the following do you think your leadership believes should be the most important objective for the marketing function in 2025? (1=Most Important)**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Maximize company profitability	15 2.07 0.88	4 2.25 0.50	19 2.00 0.82	4 1.75 0.96	3 3.00 0.00	3 2.67 0.58	14 1.64 0.84	10 1.50 0.71	9 1.56 0.88	1 1.00 ---	9 1.78 0.83	4 1.00 0.00	20 1.70 0.80	5 2.00 1.00	18 1.67 0.84
Define and deliver value that customers want and consider fair	7 2.00 1.00	2 1.00 0.00	1 2.00 ---	0 ---	2 2.00 1.41	3 3.00 0.00	7 2.00 0.00	7 1.86 1.07	10 2.40 0.84	1 1.00 ---	3 2.33 1.15	1 2.00 ---	7 2.00 0.58	1 2.00 ---	9 2.00 0.87
Innovate and grow the company	15 1.47 0.74	4 2.25 0.96	15 1.53 0.64	0 ---	4 2.00 0.00	4 1.00 0.00	13 1.92 0.95	7 2.14 0.90	12 1.75 0.75	2 2.00 1.41	10 1.80 0.79	5 2.00 0.71	20 1.65 0.88	3 1.33 0.58	11 2.00 0.89
Build, maintain, and/ or repair our brand reputation	8 1.63 0.52	1 1.00 ---	8 2.00 1.07	1 2.00 ---	1 3.00 ---	2 1.50 0.71	8 1.75 0.89	3 2.33 0.58	7 2.00 1.00	0 ---	3 1.67 1.15	3 1.67 1.15	8 2.25 0.89	3 2.33 0.58	5 2.40 0.89
Attract investors and/or business partners	7 2.29 0.76	2 1.00 0.00	5 1.80 1.10	1 3.00 ---	1 1.00 ---	0 ---	4 2.25 0.96	1 1.00 ---	2 1.50 0.71	0 ---	1 2.00 ---	1 2.00 ---	1 2.00 ---	0 ---	2 2.00 0.00
Define and defend our market position relative to competition	11 2.36 0.81	4 2.50 0.58	12 2.50 0.52	1 3.00 ---	1 2.00 ---	3 2.33 0.58	7 2.14 0.69	9 1.67 0.71	8 2.50 0.76	2 3.00 0.00	5 2.20 0.84	0 ---	18 2.44 0.78	3 2.33 1.15	6 2.00 0.89
Maximize the efficiency of marketing spending	8 2.13 0.64	2 2.00 1.41	11 2.27 0.79	3 1.33 0.58 HL	3 1.00 0.00	2 2.00 0.00	11 2.00 0.77 1	9 2.56 0.53 Dmn	10 2.10 0.88	1 2.00 ---	8 2.25 0.89	7 2.71 0.49 Dgmn	18 1.94 0.73 hl	2 1.50 0.71 hl	18 2.17 0.71
Cut marketing costs; reduce budget	2 2.50 0.71	2 2.50 0.71	4 1.75 0.96	3 2.00 1.00	0 ---	1 1.00 ---	8 2.38 0.92	3 2.33 0.58	10 1.80 0.42	1 2.00 ---	1 2.00 ---	0 ---	6 2.33 0.82	1 3.00 ---	5 2.00 1.00
Invest in new talent and/or capabilities	5 2.40 0.89	0 ---	3 2.00 1.00	2 2.50 0.71	0 ---	0 ---	3 3.00 0.00	2 3.00 0.00	1 3.00 ---	1 2.00 ---	2 2.50 0.71	0 ---	4 2.50 0.58	0 ---	0 ---

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Which of the following do you think your leadership believes should be the most important objective for the marketing function in 2025? (1=Most Important)**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Maximize company profitability	15 1.80 0.77	9 1.78 0.97	20 1.90 0.85	26 1.85 0.88	11 1.55 0.69	34 1.74 0.83	23 1.91 0.90	17 1.59 0.71 b	12 2.25 0.87 ah	27 1.89 0.89	10 1.70 0.67	14 1.93 0.92	9 1.78 0.83	10 1.80 0.92	39 1.69 0.83 b
Define and deliver value that customers want and consider fair	9 2.11 0.93	2 2.00 0.00	7 2.71 0.49	15 1.53 0.64	5 2.60 0.55	10 2.30 0.82	12 1.92 0.90	10 2.00 0.82	5 1.80 0.84	11 2.18 0.87	4 2.25 0.96	8 2.13 0.83	4 2.00 0.82	1 3.00 ---	18 2.00 0.84
			Dg	CEf	D	d	c								
Innovate and grow the company	16 1.69 0.87	10 1.90 0.74	15 1.53 0.64	28 1.86 0.85	11 2.09 0.83	28 1.61 0.74	16 1.75 0.93	19 1.89 0.88	11 1.73 0.79	23 1.83 0.78	13 1.85 0.99	13 1.62 0.65	6 1.67 1.03	9 1.44 0.73	30 1.73 0.78
Build, maintain, and/or repair our brand reputation	5 2.40 0.89	4 1.75 0.96	7 2.00 0.82	14 1.86 0.86	6 1.83 0.98	13 1.92 0.86	12 2.08 0.90	5 2.40 0.89 c	4 2.00 1.15	12 1.50 0.52 ae	4 2.25 0.96	12 2.17 0.94 c	4 1.50 0.58	1 3.00 ---	18 2.00 0.91
Attract investors and/or business partners	9 1.44 0.53 cD	0 --- ---	6 2.33 0.82 a	5 2.40 0.55 A	2 2.00 1.41	4 1.75 0.96	2 2.00 1.41	10 1.70 0.82	2 2.00 0.00	7 1.71 0.76	1 3.00 ---	2 1.50 0.71	1 3.00 ---	0 --- ---	5 2.40 0.89
Define and defend our market position relative to competition	9 2.56 0.53	4 2.25 0.96	12 2.25 0.75	13 2.00 0.82	4 3.00 0.00	21 2.57 0.60	25 2.12 0.78	7 2.43 0.53	6 2.50 0.84	18 2.22 0.81	8 2.25 0.89	9 2.22 0.67	6 2.33 0.82	5 2.40 0.89	30 2.30 0.75
				f		dg	f								
Maximize the efficiency of marketing spending	8 2.25 0.71	8 2.38 0.74	10 1.60 0.84 d	24 2.42 0.78 ce	10 1.80 0.79 d	30 2.07 0.69	22 2.09 0.68	7 2.57 0.79	10 1.90 0.74	20 2.15 0.81	7 1.86 0.69	17 2.00 0.94	9 2.11 0.78	10 2.10 0.57	33 2.18 0.68
Cut marketing costs; reduce budget	3 2.33 0.58	4 1.75 0.96	7 2.29 0.95	7 2.29 0.49	4 2.00 0.82	13 2.15 0.90	9 1.89 0.60	4 2.00 0.82	3 2.00 1.00	8 2.13 0.83	2 2.00 0.00	7 2.29 0.76	2 2.50 0.71	7 2.00 0.82	14 2.07 0.83
Invest in new talent and/or capabilities	3 2.33 1.15	1 3.00 ---	3 2.33 0.58	6 2.50 0.55	1 2.00 ---	6 2.50 0.84	2 3.00 0.00	4 2.50 0.58	1 1.00 ---	6 2.83 0.41	2 2.50 0.71	2 2.00 0.00	1 3.00 ---	2 3.00 0.00	5 2.40 0.89

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Digital marketing	217 91.9%	76 91.6%	49 89.1%	58 92.1%	33 100.0%	79 91.9%	63 95.5%	33 84.6%	20 90.9%	15 100.0%	84 88.4%	130 94.2%
Brand	212 89.8%	75 90.4%	48 87.3%	58 92.1%	31 93.9%	78 90.7%	58 87.9%	36 92.3%	19 86.4%	14 93.3%	87 91.6%	122 88.4%
Advertising	202 85.6%	69 83.1%	44 80.0%	57 90.5%	31 93.9%	74 86.0%	55 83.3%	34 87.2%	19 86.4%	13 86.7%	81 85.3%	118 85.5%
Social media	189 80.1%	65 78.3%	45 81.8%	55 87.3%	24 72.7%	69 80.2%	51 77.3%	35 89.7%	16 72.7%	12 80.0%	72 75.8%	114 82.6%
Marketing analytics	180 76.3%	60 72.3%	41 74.5%	53 84.1%	26 78.8%	64 74.4%	54 81.8%	29 74.4%	19 86.4%	7 46.7%	71 74.7%	106 76.8%
Positioning	177 75.0%	60 72.3%	45 81.8%	52 82.5%	20 60.6%	67 77.9%	43 65.2%	32 82.1%	17 77.3%	11 73.3%	69 72.6%	105 76.1%
Promotion	167 70.8%	71 85.5%	33 60.0%	42 66.7%	21 63.6%	65 75.6%	48 72.7%	26 66.7%	14 63.6%	9 60.0%	65 68.4%	99 71.7%
Marketing research	163 69.1%	61 73.5%	33 60.0%	43 68.3%	26 78.8%	59 68.6%	46 69.7%	32 82.1%	15 68.2%	7 46.7%	70 73.7%	91 65.9%
Marketing technology	162 68.6%	58 69.9%	38 69.1%	41 65.1%	25 75.8%	62 72.1%	49 74.2%	26 66.7%	15 68.2%	6 40.0%	62 65.3%	97 70.3%
Lead generation	153 64.8%	66 79.5%	42 76.4%	20 31.7%	25 75.8%	64 74.4%	46 69.7%	20 51.3%	12 54.5%	9 60.0%	66 69.5%	85 61.6%
Public relations	147 62.3%	51 61.4%	36 65.5%	40 63.5%	20 60.6%	53 61.6%	45 68.2%	23 59.0%	15 68.2%	9 60.0%	49 51.6%	95 68.8%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

N=236	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Competitive intelligence	121 51.3%	50 60.2%	20 36.4%	35 55.6%	16 48.5%	39 45.3%	38 57.6%	23 59.0%	11 50.0%	8 53.3%	50 52.6%	70 50.7%
Customer Insight	113 47.9%	40 48.2%	19 34.5%	37 58.7%	17 51.5%	34 39.5%	39 59.1%	20 51.3%	12 54.5%	5 33.3%	47 49.5%	64 46.4%
Customer experience	95 40.3%	27 32.5%	18 32.7%	36 57.1%	14 42.4%	19 22.1%	36 54.5%	23 59.0%	10 45.5%	4 26.7%	38 40.0%	57 41.3%
Customer relationship management	86 36.4%	26 31.3%	21 38.2%	26 41.3%	13 39.4%	26 30.2%	25 37.9%	19 48.7%	12 54.5%	3 20.0%	29 30.5%	55 39.9%
Market entry strategies	80 33.9%	29 34.9%	14 25.5%	29 46.0%	8 24.2%	24 27.9%	22 33.3%	19 48.7%	7 31.8%	6 40.0%	25 26.3%	54 39.1%
e-commerce	77 32.6%	20 24.1%	11 20.0%	30 47.6%	15 45.5%	9 10.5%	31 47.0%	16 41.0%	14 63.6%	5 33.3%	22 23.2%	53 38.4%
Revenue growth	76 32.2%	30 36.1%	9 16.4%	29 46.0%	8 24.2%	21 24.4%	19 28.8%	17 43.6%	11 50.0%	6 40.0%	25 26.3%	50 36.2%
New products or new services	68 28.8%	29 34.9%	6 10.9%	27 42.9%	6 18.2%	18 20.9%	24 36.4%	15 38.5%	5 22.7%	4 26.7%	20 21.1%	46 33.3%
Innovation	62 26.3%	14 16.9%	9 16.4%	29 46.0%	10 30.3%	11 12.8%	20 30.3%	17 43.6%	8 36.4%	3 20.0%	18 18.9%	43 31.2%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

N=236	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Pricing	61 25.8%	28 33.7%	5 9.1%	22 34.9%	6 18.2%	12 14.0%	21 31.8%	15 38.5%	9 40.9%	3 20.0%	22 23.2%	38 27.5%
		B	AC	B		BCD	A	A	A			
Sales	46 19.5%	14 16.9%	6 10.9%	16 25.4%	9 27.3%	10 11.6%	16 24.2%	7 17.9%	10 45.5%	0 0.0%	17 17.9%	28 20.3%
			c	b		bD	ae	d	AcE	bD		
Market selection	40 16.9%	20 24.1%	3 5.5%	13 20.6%	4 12.1%	11 12.8%	13 19.7%	8 20.5%	4 18.2%	2 13.3%	20 21.1%	19 13.8%
		B	Ac	b								
Talent acquisition and retention	30 12.7%	8 9.6%	5 9.1%	15 23.8%	2 6.1%	8 9.3%	14 21.2%	3 7.7%	3 13.6%	2 13.3%	10 10.5%	19 13.8%
			c	abd	c	b	a					
Privacy	28 11.9%	11 13.3%	7 12.7%	5 7.9%	5 15.2%	9 10.5%	6 9.1%	5 12.8%	4 18.2%	4 26.7%	11 11.6%	16 11.6%
Customer service	27 11.4%	10 12.0%	4 7.3%	7 11.1%	5 15.2%	5 5.8%	12 18.2%	5 12.8%	4 18.2%	1 6.7%	10 10.5%	17 12.3%
						b	a					
Sustainability	21 8.9%	9 10.8%	2 3.6%	7 11.1%	3 9.1%	5 5.8%	11 16.7%	4 10.3%	1 4.5%	0 0.0%	8 8.4%	13 9.4%
						b	a					
Distribution	17 7.2%	9 10.8%	4 7.3%	3 4.8%	1 3.0%	7 8.1%	5 7.6%	2 5.1%	2 9.1%	1 6.7%	7 7.4%	10 7.2%
Stock market performance	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

N=236

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Brand	23 88.5%	6 75.0% c	27 100.0% bJLno	6 100.0%	5 100.0%	6 100.0%	24 96.0%	17 94.4%	21 91.3%	2 66.7% C	12 85.7%	5 71.4% C	32 86.5%	5 83.3% c	21 84.0% c
Digital marketing	23 88.5%	7 87.5%	26 96.3%	5 83.3% g	5 100.0%	5 83.3% g	25 100.0% dfn	16 88.9%	20 87.0%	3 100.0%	13 92.9%	6 85.7%	36 97.3%	5 83.3% g	22 88.0%
Advertising	22 84.6%	7 87.5%	25 92.6%	5 83.3%	4 80.0%	4 66.7%	22 88.0%	17 94.4%	19 82.6%	2 66.7%	10 71.4%	6 85.7%	30 81.1%	6 100.0%	23 92.0%
Positioning	21 80.8% J	5 62.5% c	26 96.3% bDFJlImnO	3 50.0% C	5 100.0% j	3 50.0% C	21 84.0% Jo	15 83.3% J	15 65.2% Cj	0 0.0% ACeGHikM	11 78.6% j	5 71.4% c	29 78.4% cJ	4 66.7% c	14 56.0% Cg
Social media	21 80.8%	7 87.5%	24 88.9%	5 83.3%	5 100.0%	4 66.7%	19 76.0%	15 83.3%	18 78.3%	2 66.7%	11 78.6%	4 57.1%	29 78.4%	4 66.7%	21 84.0%
Lead generation	20 76.9% Co	4 50.0% M	7 25.9% AEGijKlMn	4 66.7%	5 100.0% Co	4 66.7%	17 68.0% Cm	10 55.6% M	14 60.9% cM	3 100.0% c	10 71.4% C	5 71.4% c	34 91.9% BCgHIO	5 83.3% c	11 44.0% aeM
Marketing analytics	19 73.1% g	5 62.5% g	21 77.8%	4 66.7% g	4 80.0%	5 83.3%	24 96.0% abdHim	11 61.1% G	16 69.6% g	3 100.0%	11 78.6%	6 85.7%	26 70.3% g	5 83.3%	20 80.0%
Public relations	19 73.1% dH	3 37.5%	20 74.1% dH	1 16.7% acgikmo	3 60.0%	2 33.3%	16 64.0% dh	5 27.8% ACgikMo	16 69.6% dh	2 66.7%	10 71.4% dh	4 57.1%	26 70.3% dH	3 50.0%	17 68.0% dh
Marketing technology	19 73.1% h	4 50.0%	18 66.7%	5 83.3%	4 80.0%	4 66.7%	18 72.0% h	7 38.9% agiM	17 73.9% h	2 66.7%	9 64.3%	4 57.1%	30 81.1% H	4 66.7%	17 68.0%
Marketing research	18 69.2%	5 62.5%	20 74.1%	4 66.7%	3 60.0%	4 66.7%	19 76.0%	13 72.2%	14 60.9%	2 66.7%	10 71.4%	4 57.1%	27 73.0%	4 66.7%	16 64.0%
Promotion	16 61.5% I	5 62.5% i	18 66.7% i	2 33.3% hllm	4 80.0%	4 66.7% i	17 68.0% i	15 83.3% d	22 95.7% AbcDfgKN	2 66.7% O	7 50.0% Il	7 100.0% dk	29 78.4% d	3 50.0% I	16 64.0% I

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	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Competitive intelligence	7 26.9% CgIM	5 62.5%	20 74.1% AiKO	2 33.3% m	2 40.0%	2 33.3% m	14 56.0% ak	10 55.6%	10 43.5% cm	1 33.3%	3 21.4% CgIM	5 71.4% ak	28 75.7% AdfiKO	3 50.0%	9 36.0% CM
Customer experience	7 26.9% Ce	3 37.5%	18 66.7% AfiKM	3 50.0%	4 80.0% akM	1 16.7% c	10 40.0%	8 44.4%	8 34.8% c	2 66.7%	2 14.3% Ceno	4 57.1%	8 21.6% CEno	4 66.7% km	13 52.0% km
Customer Insight	6 23.1% bCghino	5 62.5% a	17 63.0% Ak	2 33.3%	3 60.0%	2 33.3%	13 52.0% a	10 55.6% a	13 56.5% a	2 66.7%	4 28.6% c	2 28.6%	15 40.5%	4 66.7% a	15 60.0% a
e-commerce	5 19.2% CeO	4 50.0% hKm	19 70.4% AfGHjKM	3 50.0% km	4 80.0% aHiKM	1 16.7% c	8 32.0% Ck	2 11.1% bCEO	6 26.1% Ceko	0 0.0% c	0 0.0% BCdEgilmO	3 42.9% k	5 13.5% bCdEnO	3 50.0% km	14 56.0% AHiKM
Sales	5 19.2% cK	4 50.0% cK	4 14.8% b	1 16.7%	1 20.0%	1 16.7%	5 20.0%	4 22.2%	5 21.7%	0 0.0%	0 0.0% Bo	1 14.3%	7 18.9%	1 16.7%	7 28.0% k
Market entry strategies	5 19.2% Ch	2 25.0%	16 59.3% Afkmo	1 16.7%	2 40.0%	0 0.0% ch	10 40.0%	10 55.6% afo	8 34.8%	1 33.3%	3 21.4% c	3 42.9%	11 29.7% c	2 33.3%	6 24.0% ch
New products or new services	4 15.4% Ci	2 25.0% c	18 66.7% AbdGhKMn O	1 16.7% c	2 40.0% k	2 33.3% k	5 20.0% Ci	6 33.3% ck	11 47.8% agKmo	1 33.3% k	0 0.0% CefhIjl	2 28.6% k	8 21.6% Ci	1 16.7% c	5 20.0% Ci
Revenue growth	3 11.5% bCeHlmo	4 50.0% ak	13 48.1% Akn	2 33.3%	3 60.0% ak	1 16.7%	7 28.0%	9 50.0% Akn	5 21.7%	1 33.3%	1 7.1% bcehlm	4 57.1% akn	14 37.8% ak	0 0.0% chl	9 36.0% a
Customer relationship management	3 11.5% bcDeghINO	4 50.0% a	11 40.7% a	5 83.3% AgjkM	3 60.0% am	2 33.3%	9 36.0% ad	8 44.4% a	11 47.8% Am	0 0.0% d	4 28.6% d	3 42.9%	7 18.9% Deino	4 66.7% Am	12 48.0% Am

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**Topic 4: Marketing Leadership**

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	Industry Sector														
	Banking Finance Insurance A	Communi-cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac-turing I	Mining Construc-tion J	Profes-sional Services K	Real Estate L	Tech Software Platform M	Transpor-tation N	Retail Wholesale O
Innovation	3 11.5% CL	3 37.5%	20 74.1% AdeFGHIjK MnO	1 16.7% c	1 20.0% c	0 0.0% Cl	4 16.0% CL	4 22.2% Cl	5 21.7% Cl	0 0.0% c	3 21.4% Cl	5 71.4% AfGhikMo	5 13.5% CL	1 16.7% c	7 28.0% Cl
Distribution	3 11.5%	1 12.5%	1 3.7%	0 0.0%	0 0.0%	0 0.0%	2 8.0%	1 5.6%	4 17.4% o	0 0.0%	0 0.0%	0 0.0%	5 13.5%	0 0.0%	0 0.0% i
Market selection	2 7.7% hl	1 12.5%	6 22.2%	0 0.0%	1 20.0%	0 0.0%	4 16.0%	6 33.3% ak	6 26.1% k	0 0.0%	0 0.0% hil	3 42.9% ak	8 21.6%	0 0.0%	3 12.0%
Privacy	2 7.7%	0 0.0%	3 11.1%	0 0.0%	2 40.0% k	1 16.7%	4 16.0%	1 5.6%	5 21.7%	1 33.3% k	0 0.0% ejl	2 28.6% k	5 13.5%	0 0.0%	2 8.0%
Customer service	1 3.8%	2 25.0%	5 18.5%	1 16.7%	1 20.0%	1 16.7%	4 16.0%	1 5.6%	3 13.0%	0 0.0%	0 0.0%	1 14.3%	2 5.4%	0 0.0%	5 20.0%
Pricing	1 3.8% BCDghiJmo	4 50.0% AK	13 48.1% AKn	3 50.0% Ak	1 20.0%	1 16.7%	7 28.0% ak	5 27.8% ak	7 30.4% ak	2 66.7% AK	0 0.0% BCdghiJm	1 14.3%	10 27.0% ak	0 0.0% c	6 24.0% a
Sustainability	1 3.8% n	1 12.5%	5 18.5% g	1 16.7% g	0 0.0%	0 0.0%	0 0.0% cdiN	1 5.6%	4 17.4% g	0 0.0%	0 0.0% n	0 0.0%	3 8.1%	2 33.3% aGk	3 12.0%
Talent acquisition and retention	1 3.8% cL	1 12.5%	8 29.6% ai	0 0.0% l	0 0.0%	0 0.0%	2 8.0% L	4 22.2%	1 4.3% cL	0 0.0%	2 14.3%	4 57.1% AdfGIMO	4 10.8% L	1 16.7%	2 8.0% L
Stock market performance	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

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**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

N=236

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Positioning	23 85.2% c	10 66.7%	16 55.2% aG	36 75.0%	14 73.7%	41 75.9%	35 85.4% C	24 82.8% b	10 55.6% af	34 73.9%	15 78.9%	19 63.3% f	13 92.9% be	12 80.0%	50 78.1%
Brand	21 77.8% eg	12 80.0% eg	25 86.2%	44 91.7%	19 100.0% ab	49 90.7%	40 97.6% ab	21 72.4% beH	18 100.0% ad	41 89.1%	15 78.9%	28 93.3% a	13 92.9%	14 93.3%	61 95.3% Ad
Digital marketing	21 77.8% dF	11 73.3% dF	27 93.1%	46 95.8% ab	18 94.7%	53 98.1% AB	38 92.7%	22 75.9% degh	16 88.9%	42 91.3%	19 100.0% a	29 96.7% a	14 100.0%	15 100.0% a	59 92.2% a
Marketing research	20 74.1%	10 66.7%	15 51.7% fg	30 62.5%	15 78.9%	40 74.1% c	31 75.6% c	18 62.1%	12 66.7%	28 60.9%	11 57.9%	20 66.7%	12 85.7%	12 80.0%	50 78.1%
Lead generation	19 70.4%	10 66.7%	20 69.0%	30 62.5%	13 68.4%	37 68.5%	22 53.7%	18 62.1% d	13 72.2%	28 60.9% d	17 89.5% aceh	17 56.7% d	11 78.6%	9 60.0%	39 60.9% d
Social media	19 70.4% e	11 73.3%	22 75.9%	38 79.2%	18 94.7% a	45 83.3%	33 80.5%	18 62.1% ef	16 88.9%	36 78.3%	16 84.2%	27 90.0% a	13 92.9% a	13 86.7%	49 76.6%
Advertising	17 63.0% DeFG	12 80.0%	22 75.9% g	44 91.7% A	17 89.5% a	48 88.9% A	39 95.1% Ac	20 69.0% H	15 83.3%	36 78.3% h	17 89.5%	26 86.7%	13 92.9%	14 93.3%	60 93.8% Ac
Promotion	16 59.3%	10 66.7%	20 69.0%	37 77.1%	16 84.2%	37 68.5%	29 70.7%	14 48.3% BcdFG	16 88.9% Ah	34 73.9% ag	15 78.9% a	20 66.7% g	13 92.9% Ah	15 100.0% AceH	40 62.5% bfG
Competitive intelligence	15 55.6%	9 60.0%	11 37.9%	24 50.0%	11 57.9%	28 51.9%	21 51.2%	17 58.6%	7 38.9%	22 47.8%	13 68.4%	13 43.3%	6 42.9%	9 60.0%	33 51.6%
Marketing analytics	14 51.9% dEFg	10 66.7% e	21 72.4%	38 79.2% a	18 94.7% Ab	45 83.3% A	32 78.0% a	15 51.7% ceGH	12 66.7%	35 76.1% a	15 78.9%	24 80.0% a	11 78.6%	14 93.3% A	54 84.4% A

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**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

N=236

	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Public relations	14 51.9% de	9 60.0%	17 58.6%	37 77.1% afg	16 84.2% afg	31 57.4% de	21 51.2% de	16 55.2%	12 66.7%	29 63.0%	15 78.9%	18 60.0%	11 78.6%	11 73.3%	35 54.7%
Marketing technology	13 48.1% Def	8 53.3%	19 65.5%	38 79.2% A	15 78.9% a	39 72.2% a	28 68.3%	13 44.8% bdfgh	14 77.8% a	30 65.2%	15 78.9% a	20 66.7%	11 78.6% a	12 80.0% a	46 71.9% a
Customer relationship management	12 44.4%	10 66.7% cdfg	9 31.0% b	16 33.3% b	6 31.6%	20 37.0% b	13 31.7% b	15 51.7% D	5 27.8%	17 37.0% d	2 10.5% Aceh	13 43.3% d	5 35.7%	6 40.0%	23 35.9% d
Market entry strategies	10 37.0%	7 46.7%	7 24.1%	12 25.0%	9 47.4%	17 31.5%	18 43.9%	14 48.3%	4 22.2%	12 26.1%	7 36.8%	9 30.0%	4 28.6%	6 40.0%	24 37.5%
Customer Insight	10 37.0% G	5 33.3% G	9 31.0% eG	20 41.7% G	12 63.2% c	26 48.1% g	30 73.2% ABCDf	10 34.5% h	6 33.3%	18 39.1% h	5 26.3% efh	17 56.7% d	9 64.3% d	9 60.0%	38 59.4% acd
Customer experience	10 37.0%	7 46.7%	12 41.4%	13 27.1% Eg	12 63.2% Df	19 35.2% e	22 53.7% d	12 41.4%	6 33.3%	19 41.3%	4 21.1% h	11 36.7%	5 35.7%	6 40.0%	31 48.4% d
New products or new services	9 33.3%	7 46.7% d	10 34.5%	8 16.7% b	7 36.8%	14 25.9%	12 29.3%	11 37.9%	5 27.8%	16 34.8%	5 26.3%	6 20.0%	4 28.6%	4 26.7%	17 26.6%
Revenue growth	7 25.9%	6 40.0%	8 27.6%	16 33.3%	9 47.4%	18 33.3%	11 26.8%	8 27.6%	4 22.2%	19 41.3%	7 36.8%	9 30.0%	4 28.6%	5 33.3%	20 31.3%
Sales	6 22.2%	7 46.7% defg	6 20.7%	7 14.6% b	2 10.5% b	11 20.4% b	7 17.1% b	7 24.1%	4 22.2%	7 15.2%	5 26.3%	7 23.3%	4 28.6%	3 20.0%	9 14.1%
Pricing	6 22.2% b	8 53.3% acF	6 20.7% b	13 27.1%	6 31.6%	10 18.5% B	11 26.8%	7 24.1%	3 16.7%	15 32.6% e	8 42.1% e	3 10.0% cd	3 21.4%	5 33.3%	17 26.6%

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**Topic 4: Marketing Leadership**

**What is marketing primarily responsible for in your company?**

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	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Customer service	6 22.2% dg	5 33.3% DFG	4 13.8%	2 4.2% aB	3 15.8%	5 9.3% b	2 4.9% aB	7 24.1% dh	3 16.7%	7 15.2%	0 0.0% a	3 10.0%	1 7.1%	1 6.7%	5 7.8% a
Distribution	5 18.5% fg	1 6.7%	4 13.8%	4 8.3%	0 0.0%	2 3.7% a	1 2.4% a	4 13.8% e	4 22.2% EH	4 8.7%	2 10.5%	0 0.0% aB	1 7.1%	0 0.0%	2 3.1% B
Talent acquisition and retention	5 18.5%	2 13.3%	4 13.8%	5 10.4%	1 5.3%	8 14.8%	5 12.2%	7 24.1% d	2 11.1%	6 13.0%	0 0.0% ag	2 6.7%	1 7.1%	3 20.0% d	9 14.1%
e-commerce	4 14.8% bef	7 46.7% a	8 27.6%	17 35.4%	9 47.4% a	20 37.0% a	12 29.3%	8 27.6%	6 33.3%	15 32.6%	4 21.1%	11 36.7%	5 35.7%	7 46.7%	20 31.3%
Privacy	4 14.8%	1 6.7%	3 10.3%	8 16.7%	3 15.8%	4 7.4%	5 12.2%	8 27.6% ch	1 5.6%	4 8.7% a	2 10.5%	4 13.3%	2 14.3%	1 6.7%	6 9.4% a
Innovation	4 14.8%	6 40.0%	8 27.6%	10 20.8%	7 36.8%	14 25.9%	12 29.3%	8 27.6%	2 11.1%	15 32.6%	5 26.3%	6 20.0%	2 14.3%	4 26.7%	20 31.3%
Market selection	3 11.1%	5 33.3% f	5 17.2%	8 16.7%	4 21.1%	5 9.3% bg	10 24.4% f	6 20.7%	1 5.6%	9 19.6%	3 15.8%	5 16.7%	2 14.3%	2 13.3%	11 17.2%
Sustainability	1 3.7%	2 13.3%	4 13.8%	4 8.3%	4 21.1% g	5 9.3%	1 2.4% e	2 6.9%	1 5.6%	5 10.9%	4 21.1% h	4 13.3%	0 0.0%	2 13.3%	3 4.7% d
Stock market performance	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

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**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
<b>Fostering a customer-first culture</b>												
N	218	74	50	61	32	78	60	36	22	15	87	128
Mean	5.69	5.73	5.70	5.57	5.97	5.49	5.92	5.67	5.77	6.00	5.59	5.80
SD	1.07	0.97	1.23	1.06	0.69	1.11	1.01	0.93	1.02	1.00	1.15	1.00
						b	a					
<b>Building relationships with members of C-suite</b>												
N	218	74	50	61	32	78	60	36	22	15	87	128
Mean	5.92	5.82	5.86	5.92	6.19	5.79	6.00	5.83	6.05	6.33	5.95	5.90
SD	1.02	1.14	1.09	0.88	0.86	1.07	0.96	1.13	0.90	0.82	0.95	1.08
<b>Managing marketing as a growth engine</b>												
N	218	74	50	61	32	78	60	36	22	15	88	127
Mean	5.50	5.47	5.28	5.62	5.81	5.62	5.53	5.36	5.50	5.53	5.31	5.66
SD	1.18	1.31	1.13	0.97	1.03	1.07	1.29	1.22	1.06	1.30	1.28	1.08
			d		b						b	a
<b>Able to resolve ambiguity</b>												
N	217	73	50	61	32	77	60	36	22	15	86	128
Mean	5.53	5.53	5.54	5.56	5.63	5.45	5.57	5.47	5.91	5.87	5.35	5.65
SD	1.25	1.34	1.23	1.10	1.16	1.21	1.32	1.13	1.19	1.19	1.41	1.12
<b>Developing marketing capabilities around key success factors for the company</b>												
N	218	74	50	61	32	78	60	36	22	15	87	128
Mean	5.59	5.61	5.60	5.49	5.84	5.58	5.75	5.47	5.55	5.80	5.49	5.65
SD	1.16	1.21	1.05	1.12	0.99	0.95	1.27	1.28	1.14	1.01	1.34	1.02
<b>Leading, not just executing</b>												
N	217	74	50	60	32	78	60	36	21	15	87	127
Mean	5.78	5.74	5.82	5.83	5.88	5.77	5.87	5.92	6.00	5.27	5.63	5.87
SD	1.24	1.31	1.21	1.06	1.18	1.19	1.24	1.27	1.18	1.03	1.43	1.09
<b>Enabling talent</b>												
N	217	73	50	61	32	78	59	36	22	15	87	127
Mean	5.60	5.59	5.58	5.64	5.72	5.67	5.63	5.39	5.82	5.53	5.32	5.77
SD	1.27	1.27	1.23	1.18	1.33	1.20	1.38	1.05	1.40	1.25	1.45	1.11
											b	a

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
<b>Curiosity</b>												
N	218	74	50	61	32	78	60	36	22	15	87	128
Mean	5.82	5.76	5.78	5.84	6.16	5.79	5.75	5.83	6.23	5.87	5.60	5.95
SD	1.29	1.27	1.40	1.13	1.17	1.25	1.37	1.18	1.02	1.51	1.34	1.24
<b>Enjoys a challenge</b>												
N	218	74	50	61	32	78	60	36	22	15	87	128
Mean	6.06	6.05	5.92	6.03	6.41	6.00	6.15	6.00	6.32	6.13	5.93	6.13
SD	1.12	1.16	1.34	0.91	0.91	1.20	0.90	1.15	0.72	1.46	1.26	1.01
<b>Agile when change is required</b>												
N	217	74	49	61	32	77	60	36	22	15	87	127
Mean	5.95	6.00	5.88	5.95	6.09	5.95	5.95	5.83	6.27	6.27	5.83	6.02
SD	1.16	1.24	1.24	0.94	0.89	1.18	1.20	1.16	0.77	0.88	1.24	1.10
<b>Resilient when facing threats</b>												
N	216	74	50	59	32	78	60	34	22	15	87	126
Mean	5.84	5.82	5.74	5.97	5.94	5.74	5.92	5.88	6.09	5.93	5.76	5.90
SD	1.16	1.21	1.19	0.95	1.05	1.10	1.27	1.20	0.81	1.10	1.16	1.16
<b>Able to balance the short-term and the long-run</b>												
N	215	74	48	60	32	77	60	34	22	15	86	126
Mean	5.53	5.55	5.69	5.63	5.22	5.52	5.63	5.56	5.50	5.73	5.36	5.66
SD	1.18	1.12	1.13	1.04	1.31	0.99	1.26	1.13	1.19	1.16	1.36	1.03

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
<b>Fostering a customer-first culture</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	23
Mean	5.83	5.86	5.69	5.50	6.60	5.00	5.67	5.25	5.75	5.67	6.08	5.86	5.68	6.00	5.52
SD	0.98	0.90	0.97	0.84	0.55	1.26	1.24	0.86	1.02	0.58	0.90	0.38	1.17	1.26	1.41
				e	dfHl	e		Ek			h	e			
<b>Building relationships with members of C-suite</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	23
Mean	6.09	6.57	5.77	5.67	6.20	6.00	6.08	5.25	5.60	6.33	5.67	6.29	5.97	6.33	6.04
SD	1.24	0.53	0.86	1.03	1.10	0.63	0.97	1.39	0.99	1.15	0.89	0.49	1.03	0.82	0.98
		chik	b				h	bgmo	b		b		h		h
<b>Managing marketing as a growth engine</b>															
N	24	7	26	6	5	6	24	16	20	3	12	7	33	6	23
Mean	5.38	5.43	5.62	6.33	6.20	5.17	5.75	5.38	5.05	4.00	5.17	5.86	5.79	6.00	5.17
SD	1.31	1.13	1.02	0.52	1.10	0.75	1.03	1.02	1.54	1.00	0.94	0.69	1.05	1.10	1.50
			j	fhJk	j	d	j	dj	m	cDeghLMn	d	J	iJ	j	
<b>Able to resolve ambiguity</b>															
N	23	7	26	6	5	6	24	16	19	3	12	7	34	6	23
Mean	5.57	5.57	5.62	5.33	6.80	5.00	5.83	5.44	4.95	6.67	5.67	5.29	5.74	5.17	5.22
SD	0.95	0.98	0.85	0.52	0.45	1.41	1.34	1.03	1.51	0.58	1.15	1.80	1.46	1.47	1.38
	E	e	Ej	EJ	AbCDfhino	e	i	e	eg	cD				e	e
<b>Developing marketing capabilities around key success factors for the company</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	23
Mean	5.91	5.29	5.54	6.33	6.40	5.00	5.54	5.19	5.35	5.67	5.58	5.71	5.85	6.00	5.17
SD	1.16	0.76	1.07	0.52	0.55	0.63	1.14	0.98	1.53	1.53	0.79	1.25	1.08	0.89	1.50
	h	de		bFh	bFh	DEn		adem					h	f	
<b>Leading, not just executing</b>															
N	23	7	25	6	5	6	24	16	20	3	12	7	34	6	23
Mean	6.22	6.00	5.92	5.50	6.20	5.33	5.75	5.56	5.45	6.33	6.00	5.29	5.85	5.00	5.78
SD	1.13	0.82	0.81	0.84	1.30	1.37	1.42	0.96	1.32	1.15	0.95	1.60	1.48	1.41	1.38
	in		n						a					ac	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
<b>Enabling talent</b>															
N	23	7	25	6	5	6	24	16	20	3	12	7	34	6	23
Mean	5.78	6.00	5.44	5.17	6.00	5.50	5.50	5.56	5.00	6.00	5.92	6.00	5.82	4.83	5.70
SD	1.20	0.82	1.04	1.17	1.22	1.64	1.44	1.15	1.65	0.00	0.79	1.83	1.19	0.98	1.40
		n							m		n		i	bk	
<b>Curiosity</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	23
Mean	5.74	6.57	5.62	6.00	6.40	6.17	6.04	5.63	5.70	6.00	5.75	5.57	5.62	5.83	6.04
SD	1.54	0.79	1.10	1.10	0.89	0.98	1.00	1.31	1.63	1.00	1.36	1.13	1.44	1.33	1.36
		c	b												
<b>Enjoys a challenge</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	23
Mean	5.83	6.71	5.77	6.17	6.80	6.00	6.29	5.94	5.75	6.00	6.08	6.57	6.09	5.67	6.26
SD	1.53	0.76	0.65	0.75	0.45	0.89	1.00	1.18	1.55	1.00	0.90	0.53	1.29	1.21	0.86
		C	BEgLo		C		c					C			c
<b>Agile when change is required</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	33	6	23
Mean	5.70	5.71	5.85	6.00	6.80	6.17	6.17	6.00	5.30	5.67	6.08	6.00	6.24	5.67	6.04
SD	1.46	1.38	0.92	0.89	0.45	0.75	0.96	0.89	1.66	1.15	0.67	0.58	1.17	1.03	1.30
			e		ckln		i		gm		e	e	i	e	
<b>Resilient when facing threats</b>															
N	23	7	26	6	5	6	24	16	20	3	12	7	34	6	21
Mean	5.48	6.00	5.85	6.00	6.80	5.83	6.13	5.75	5.45	7.00	5.67	5.57	5.79	6.33	5.95
SD	1.41	1.29	0.83	0.63	0.45	0.41	0.90	0.86	1.57	0.00	0.89	0.98	1.37	1.03	1.32
			e	e	cdFhkl	E		e			e	e			
<b>Able to balance the short-term and the long-run</b>															
N	22	7	26	5	5	6	23	16	20	3	12	7	34	6	23
Mean	5.55	5.00	5.54	5.60	6.20	5.00	5.57	5.69	5.25	6.33	5.58	4.43	5.65	6.00	5.70
SD	1.18	1.63	0.86	0.55	0.84	1.26	1.12	1.01	1.45	1.15	0.79	1.51	1.18	0.63	1.43
			1		1		1	1			1	ceghkmm	1	1	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H

Fostering a customer-first culture

N	26	13	28	44	18	50	37	27	16	44	17	26	14	14	59
Mean	5.96	5.62	5.61	5.57	5.72	5.84	5.51	5.78	5.69	5.68	5.65	5.62	5.43	6.21	5.63
SD	1.11	1.04	1.40	0.90	1.13	1.08	0.96	1.19	0.87	1.22	0.93	1.24	0.85	0.80	1.03
													g	f	

Building relationships with members of C-suite

N	26	13	28	44	18	50	37	27	16	44	17	26	14	14	59
Mean	6.00	5.77	6.11	5.89	5.83	5.82	5.97	5.96	5.69	6.09	6.29	5.50	5.71	6.14	5.88
SD	0.98	1.01	1.20	0.87	1.04	1.12	0.99	0.98	1.14	0.91	0.77	1.14	1.27	0.77	1.05
										e	e	cd			

Managing marketing as a growth engine

N	25	13	28	44	18	51	37	26	16	44	17	27	14	14	59
Mean	5.48	5.62	5.46	5.66	5.44	5.41	5.46	5.50	5.38	5.61	5.88	5.33	5.00	5.64	5.47
SD	1.12	0.96	1.10	1.12	1.10	1.34	1.30	1.07	0.89	1.28	0.93	1.11	1.41	0.93	1.30
											f		d		

Able to resolve ambiguity

N	26	13	28	43	18	50	37	27	16	43	17	26	14	14	59
Mean	5.58	5.38	5.68	5.79	5.28	5.64	5.16	5.74	5.63	5.56	5.76	5.65	5.43	5.64	5.25
SD	1.21	1.66	1.33	1.08	1.13	1.14	1.44	1.20	0.89	1.44	1.03	1.20	1.45	1.08	1.31
				g			d								

Developing marketing capabilities around key success factors for the company

N	26	13	28	44	18	50	37	27	16	44	17	26	14	14	59
Mean	5.31	5.77	5.82	5.82	5.56	5.60	5.27	5.48	5.88	5.50	6.24	5.77	5.36	5.71	5.36
SD	1.26	0.73	1.09	1.04	0.92	1.23	1.37	1.22	0.89	1.28	0.75	0.76	0.93	0.99	1.35
				g			d	d		d	acFh		D		d

Leading, not just executing

N	26	13	28	44	18	49	37	27	16	44	17	26	14	14	58
Mean	5.81	5.54	5.82	5.89	5.89	5.94	5.41	5.85	5.81	5.68	6.18	6.12	5.64	6.43	5.41
SD	1.10	1.61	1.28	0.89	1.13	1.38	1.38	0.95	0.98	1.34	0.95	1.14	1.22	0.85	1.44
											h	h		h	deg

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate yourself/your senior marketing leader on the following traits and skills (1=Weak - 7=Excellent).**

	Sales Revenue							Number of Employees								
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+	
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H	
<b>Enabling talent</b>																
N	26	13	27	44	18	50	37	27	16	43	17	26	14	14	59	
Mean	5.77	5.69	5.74	5.61	5.83	5.68	5.05	5.89	5.88	5.49	5.88	5.81	5.57	6.36	5.10	
SD	1.03	1.25	1.51	1.06	1.15	1.24	1.53	0.97	1.36	1.35	0.93	1.27	0.94	0.93	1.40	
	g					g	af	H		g	h	h	g	cfH	AdeG	
<b>Curiosity</b>																
N	26	13	28	44	18	50	37	27	16	44	17	26	14	14	59	
Mean	5.77	6.00	5.96	5.95	5.67	5.74	5.68	5.81	5.63	5.84	6.47	5.96	5.93	6.14	5.49	
SD	1.50	1.35	1.20	1.01	1.53	1.35	1.33	1.44	1.02	1.33	0.62	1.34	1.59	0.95	1.32	
									D		BH				D	
<b>Enjoys a challenge</b>																
N	26	13	28	44	18	50	37	27	16	44	17	26	14	14	59	
Mean	5.81	5.77	6.25	6.25	6.28	6.02	5.86	5.81	5.88	6.14	6.65	6.19	6.36	6.14	5.83	
SD	1.44	1.59	0.89	0.99	0.67	1.00	1.27	1.44	1.09	1.17	0.61	0.85	0.74	0.77	1.22	
								d	d		abH				D	
<b>Agile when change is required</b>																
N	25	13	28	44	18	50	37	26	16	44	17	26	14	14	59	
Mean	5.96	5.62	6.18	6.16	6.17	5.90	5.57	5.85	6.19	5.93	6.65	5.92	5.86	6.43	5.64	
SD	1.21	1.33	1.06	0.96	1.25	1.22	1.19	1.19	0.91	1.32	0.79	0.98	1.46	0.76	1.16	
			g	g			cd	d		d	aceH	d		h	Dg	
<b>Resilient when facing threats</b>																
N	26	13	28	44	18	49	36	27	16	44	17	26	14	14	57	
Mean	5.69	5.62	6.07	6.05	5.78	5.84	5.64	5.78	6.00	5.70	6.29	6.00	5.79	6.07	5.65	
SD	1.19	1.61	1.05	0.81	1.26	1.23	1.22	1.19	0.82	1.36	0.85	1.02	1.31	0.83	1.22	
											h				d	
<b>Able to balance the short-term and the long-run</b>																
N	26	13	28	44	16	49	37	27	16	44	17	25	14	14	57	
Mean	5.58	5.38	5.68	5.64	5.50	5.67	5.14	5.56	5.88	5.34	5.71	5.76	5.43	5.86	5.35	
SD	1.10	1.04	1.16	0.99	1.03	1.28	1.40	1.12	0.96	1.26	1.05	0.93	1.16	1.29	1.29	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate how well marketing works with different functions to build your company's brand (1=Very little - 7=A great deal).**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Marketing and sales/ distribution work closely together to build the brand	217 5.63 1.24	75 5.59 1.15	50 5.80 1.21	60 5.78 1.19	31 5.32 1.30	78 5.54 1.21	60 5.67 1.40	35 5.86 1.14	22 5.41 1.14	15 5.73 1.22	87 5.48 1.30	127 5.76 1.18
Marketing and IT/digital work closely together to build the brand	216 4.87 1.60	74 4.61 1.70 d	49 4.80 1.57 d	60 4.98 1.51	32 5.47 1.34 ab	77 4.70 1.61	59 5.03 1.62	36 4.92 1.42	22 5.27 1.39	15 4.27 2.25	86 4.70 1.58	127 5.02 1.60
Marketing and operations/ production work closely together to build the brand	217 4.70 1.60	75 4.35 1.56 d	50 4.86 1.54	60 4.83 1.59	31 5.16 1.57 a	78 4.28 1.64 Cd	60 4.78 1.50	35 5.23 1.26 A	22 5.23 1.63 a	15 4.47 1.92	87 4.62 1.56	127 4.81 1.60
Marketing and finance work closely together to build the brand	217 4.48 1.71	74 4.03 1.75 CD	50 4.08 1.61 CD	60 5.10 1.51 AB	32 5.13 1.52 AB	79 4.19 1.63 C	59 4.39 1.86	35 5.06 1.08 A	22 4.91 1.93	15 4.20 2.14	86 4.22 1.63 b	128 4.73 1.70 a
Marketing and human resources work closely together to build the brand	217 4.42 1.70	75 4.43 1.61	50 4.76 1.57	60 4.18 1.83	31 4.42 1.77	78 4.44 1.68	60 4.68 1.87 e	35 4.46 1.42 e	22 4.50 1.63	15 3.53 1.41 bc	87 4.32 1.73	127 4.51 1.69

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate how well marketing works with different functions to build your company's brand (1=Very little - 7=A great deal).**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Marketing and sales/ distribution work closely together to build the brand	23 5.52 1.24	7 5.86 1.07	26 5.88 1.31	6 4.83 1.17	5 6.20 1.10	6 5.33 0.52	23 5.87 0.97	16 5.75 1.34	21 5.81 0.98	3 5.67 1.53	12 5.67 1.23	7 5.57 1.27	34 5.56 1.42	6 5.00 1.26	22 5.32 1.52
Marketing and IT/digital work closely together to build the brand	23 5.04 1.33	7 4.43 1.27	26 4.81 1.55	6 6.00 1.10	5 5.40 2.51	6 4.83 1.17	24 5.29 1.40	16 4.44 1.71	21 4.62 1.60	3 4.67 1.53	10 4.30 1.64	7 4.43 1.51	34 4.47 2.02	6 5.67 1.21	22 5.36 1.43
Marketing and operations/ production work closely together to build the brand	23 4.78 1.57	7 5.57 1.27	26 4.77 1.45	6 5.17 1.83	5 6.20 0.84	6 4.83 1.17	23 4.57 1.85	16 4.19 1.72	21 4.29 1.59	3 4.67 2.31	12 4.50 1.62	7 5.14 1.07	34 4.41 1.48	6 4.67 1.63	22 5.09 1.85
Marketing and finance work closely together to build the brand	23 4.48 1.34	7 5.00 1.29	26 5.15 1.49	6 4.33 1.63	5 5.80 1.10	6 4.67 1.75	24 4.29 1.99	15 4.53 1.41	21 4.05 1.75	3 3.00 1.00	12 4.17 1.64	7 5.14 1.95	34 4.06 1.89	6 4.83 1.72	22 4.55 1.95
Marketing and human resources work closely together to build the brand	23 4.83 1.56	7 4.57 1.99	26 4.12 1.73	6 4.50 1.87	5 4.00 2.45	6 4.33 2.07	23 4.70 1.64	16 3.25 1.48	21 4.38 1.63	3 4.33 2.08	12 4.75 1.60	7 3.86 1.68	34 4.50 1.73	6 5.33 1.37	22 4.64 1.73

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Rate how well marketing works with different functions to build your company's brand (1=Very little - 7=A great deal).**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Marketing and sales/ distribution work closely together to build the brand	26 5.77 1.39	13 6.15 0.99	28 5.61 1.34	44 5.57 1.21	19 5.68 1.16	50 5.60 1.41	35 5.46 0.98	27 6.00 1.21	16 5.25 1.34	44 5.55 1.32	17 6.06 1.14	27 5.33 1.41	14 5.29 1.27	14 6.21 0.97	57 5.58 1.10
		g				b		g				g	g	bef	
Marketing and IT/digital work closely together to build the brand	25 5.04 1.84	13 4.69 1.75	28 5.07 1.46	44 4.84 1.58	19 4.63 1.74	49 4.82 1.69	36 4.94 1.29	26 5.27 1.66	16 5.13 1.71	44 4.64 1.71	17 4.71 1.57	27 4.33 1.88	14 5.07 1.33	14 5.57 1.28	57 4.84 1.42
												g		e	
Marketing and operations/ production work closely together to build the brand	26 4.81 1.90	13 5.15 1.68	28 4.96 1.17	44 4.50 1.61	19 5.16 1.46	50 4.56 1.61	35 4.54 1.67	27 4.85 1.85	16 4.44 1.15	44 4.95 1.60	17 4.82 1.51	27 4.59 1.65	14 4.71 1.54	14 4.71 1.38	57 4.49 1.69
Marketing and finance work closely together to build the brand	25 4.76 1.88	13 4.15 2.27	28 4.64 1.57	44 4.50 1.62	19 4.16 1.54	50 4.52 1.64	36 4.53 1.76	26 4.88 1.86	16 4.56 1.63	44 4.43 1.82	17 4.47 1.66	27 4.26 1.63	14 4.71 1.86	14 4.79 1.37	58 4.28 1.70
Marketing and human resources work closely together to build the brand	26 4.19 1.70	13 4.54 1.85	28 4.86 1.58	44 4.30 1.72	19 4.58 1.74	50 4.38 1.74	35 4.43 1.70	27 4.33 1.75	16 4.44 1.71	44 4.18 1.66	17 4.94 1.43	27 4.30 1.98	14 4.86 1.51	14 4.57 1.95	57 4.37 1.67

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How has marketing's role within your organization changed in the last five years? (-7=Significantly narrowed - +7=Significantly broadened)**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	217	75	48	61	32	78	60	36	21	15	86	128
Mean	3.24	3.13	3.44	3.11	3.59	3.69	3.08	2.81	3.48	2.93	3.14	3.31
SD	2.91	3.23	2.51	2.97	2.51	2.39	3.40	3.06	2.54	3.22	3.13	2.75

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

**How has marketing's role within your organization changed in the last five years? (-7=Significantly narrowed - +7=Significantly broadened)**

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
N	23	7	26	5	5	6	24	16	21	3	12	7	33	6	23
Mean	3.65	2.57	3.08	4.00	3.20	3.83	3.04	2.75	2.38	2.33	2.83	3.00	3.73	4.50	3.61
SD	3.01	2.82	2.74	2.55	3.11	2.93	3.34	2.86	3.89	5.51	1.70	1.73	2.31	2.59	3.23

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How has marketing's role within your organization changed in the last five years? (-7=Significantly narrowed - +7=Significantly broadened)**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
N	26	12	28	43	19	50	37	27	16	43	17	27	14	13	59
Mean	2.04	1.83	3.29	3.58	3.53	3.96	2.89	2.00	3.06	3.33	3.65	3.33	4.21	5.46	2.86
SD	3.01	2.66	2.83	2.71	3.24	2.44	3.36	2.81	2.54	2.71	2.94	2.95	2.69	1.51	3.19
	dF	F		a		AB		fG	G	G		g	a	ABCeH	G

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How has marketing's influence within your organization changed in the last five years? (-7=Significantly weakened - +7=Significantly strengthened)**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	217	74	50	61	31	78	60	36	22	14	87	127
Mean	2.87	2.69	2.86	2.92	3.16	3.12	2.73	2.72	2.50	3.50	2.72	2.98
SD	2.93	3.04	2.92	2.90	2.88	2.32	3.44	3.19	3.14	2.77	3.24	2.70

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How has marketing's influence within your organization changed in the last five years? (-7=Significantly weakened - +7=Significantly strengthened)**

	Industry Sector															
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
N		22	7	26	6	5	6	24	16	21	3	12	7	33	6	23
Mean		3.59	1.86	2.42	2.67	4.60	2.33	2.75	2.94	1.90	3.33	2.50	3.29	3.03	3.67	3.35
SD		3.55	2.91	3.01	2.50	2.88	2.66	3.25	2.17	3.51	4.04	1.62	2.81	2.54	3.01	3.16

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How has marketing's influence within your organization changed in the last five years? (-7=Significantly weakened - +7=Significantly strengthened)**

	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
N	25	13	27	44	19	50	37	26	15	44	17	27	14	14	59
Mean	2.28	1.69	3.19	3.07	2.63	3.70	2.14	2.19	2.00	3.25	3.88	2.81	3.86	4.00	2.32
SD	2.82	2.59	3.00	2.94	3.24	2.50	3.30	2.70	3.51	2.60	2.76	2.95	2.98	2.25	3.18
	f	f				abg	f	g						a	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Do you think the title for the senior marketing leader in your company will be different in 5 years?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Yes	67 30.7%	31 41.3% B	9 18.4% A	19 30.6%	8 25.8%	20 26.0%	20 33.3%	11 30.6%	8 36.4%	6 40.0%	25 28.7%	41 32.0%
No	151 69.3%	44 58.7% B	40 81.6% A	43 69.4%	23 74.2%	57 74.0%	40 66.7%	25 69.4%	14 63.6%	9 60.0%	62 71.3%	87 68.0%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Do you think the title for the senior marketing leader in your company will be different in 5 years?**

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Yes	6 26.1% f	0 0.0% cfj	14 53.8% bdehm	0 0.0% cf	0 0.0% cf	5 83.3% abdeghkmno	6 26.1% f	3 18.8% cf	8 38.1%	2 66.7% b	3 25.0% f	2 28.6%	9 26.5% cf	1 16.7% f	8 34.8% f
No	17 73.9% f	7 100.0% cfj	12 46.2% bdehm	6 100.0% cf	5 100.0% cf	1 16.7% abdeghkmno	17 73.9% f	13 81.3% cf	13 61.9%	1 33.3% b	9 75.0% f	5 71.4%	25 73.5% cf	5 83.3% f	15 65.2% f

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**Do you think the title for the senior marketing leader in your company will be different in 5 years?**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Yes	12 48.0% BD	0 0.0% AcFg	9 32.1% b	6 13.6% AF	5 26.3%	23 45.1% BD	11 30.6% b	7 26.9%	6 37.5%	12 27.3%	4 23.5%	7 25.9%	8 53.3%	4 28.6%	18 31.0%
No	13 52.0% BD	13 100.0% AcFg	19 67.9% b	38 86.4% AF	14 73.7%	28 54.9% BD	25 69.4% b	19 73.1%	10 62.5%	32 72.7%	13 76.5%	20 74.1%	7 46.7%	10 71.4%	40 69.0%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
<b>CEO</b>												
Yes	127 61.4%	46 63.9%	27 56.3%	40 65.6%	14 56.0%	52 68.4%	29 54.7%	19 54.3%	10 52.6%	9 60.0%	48 60.0%	77 62.1%
No	80 38.6%	26 36.1%	21 43.8%	21 34.4%	11 44.0%	24 31.6%	24 45.3%	16 45.7%	9 47.4%	6 40.0%	32 40.0%	47 37.9%
<b>Board</b>												
Yes	37 50.0%	10 43.5%	4 28.6% c	19 67.9% b	4 44.4%	8 38.1% e	10 50.0%	10 52.6%	2 40.0%	4 100.0% a	16 39.0% b	21 63.6% a
No	37 50.0%	13 56.5%	10 71.4% c	9 32.1% b	5 55.6%	13 61.9% e	10 50.0%	9 47.4%	3 60.0%	0 0.0% a	25 61.0% b	12 36.4% A
<b>CFO</b>												
Yes	131 63.3%	40 55.6% c	28 58.3% c	47 77.0% ab	15 60.0%	41 53.9% bc	38 71.7% a	26 74.3% a	10 52.6%	10 66.7%	48 60.0%	81 65.3%
No	76 36.7%	32 44.4% c	20 41.7% c	14 23.0% ab	10 40.0%	35 46.1% bc	15 28.3% a	9 25.7% a	9 47.4%	5 33.3%	32 40.0%	43 34.7%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
<b>CEO</b>															
Yes	12 60.0%	3 60.0%	17 65.4% dj	1 16.7% clM	1 25.0% lm	4 66.7%	11 57.9%	10 62.5%	13 61.9%	0 0.0% clm	7 58.3%	7 100.0% dejo	25 75.8% Dej	3 50.0%	13 56.5% 1
No	8 40.0%	2 40.0%	9 34.6% dj	5 83.3% clM	3 75.0% lm	2 33.3%	8 42.1%	6 37.5%	8 38.1%	3 100.0% clm	5 41.7%	0 0.0% dejo	8 24.2% Dej	3 50.0%	10 43.5% 1
<b>Board</b>															
Yes	3 37.5% i	1 100.0%	8 80.0% fg	0 0.0%	0 0.0%	0 0.0% ci	2 22.2% ci	5 50.0%	5 100.0% afgn	0 0.0%	1 33.3%	3 75.0%	6 60.0%	0 0.0% i	3 42.9%
No	5 62.5% i	0 0.0%	2 20.0% fg	1 100.0%	0 0.0%	3 100.0% ci	7 77.8% ci	5 50.0%	0 0.0% afgn	1 100.0%	2 66.7%	1 25.0%	4 40.0%	2 100.0% i	4 57.1%
<b>CFO</b>															
Yes	9 45.0% Clo	4 80.0%	22 84.6% Aehijk	3 50.0%	1 25.0% clo	3 50.0%	11 57.9%	8 50.0% cl	11 52.4% cl	1 33.3% cl	6 50.0% cl	7 100.0% aehijk	23 69.7%	4 66.7%	18 78.3% ae
No	11 55.0% Clo	1 20.0%	4 15.4% Aehijk	3 50.0%	3 75.0% clo	3 50.0%	8 42.1%	8 50.0% cl	10 47.6% cl	2 66.7% cl	6 50.0% cl	0 0.0% aehijk	10 30.3%	2 33.3%	5 21.7% ae

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

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

	Sales Revenue							Number of Employees								
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H	
<b>CEO</b>																
Yes	15 60.0%	8 72.7%	21 77.8% f	24 60.0%	12 63.2%	24 49.0% c	20 60.6%	14 56.0%	11 78.6%	30 71.4%	12 70.6%	14 53.8%	8 53.3%	6 42.9%	31 58.5%	
No	10 40.0%	3 27.3%	6 22.2% f	16 40.0%	7 36.8%	25 51.0% c	13 39.4%	11 44.0%	3 21.4%	12 28.6%	5 29.4%	12 46.2%	7 46.7%	8 57.1%	22 41.5%	
<b>Board</b>																
Yes	1 100.0%	0 0.0%	1 33.3%	2 40.0%	3 50.0%	14 46.7%	14 51.9%	0 0.0%	0 0.0%	6 60.0%	1 50.0%	4 66.7%	1 16.7%	4 57.1%	21 50.0%	
No	0 0.0%	0 0.0%	2 66.7%	3 60.0%	3 50.0%	16 53.3%	13 48.1%	0 0.0%	0 0.0%	4 40.0%	1 50.0%	2 33.3%	5 83.3%	3 42.9%	21 50.0%	
<b>CFO</b>																
Yes	12 48.0% e	6 54.5%	18 66.7%	22 55.0% e	16 84.2% ad	34 69.4%	20 60.6%	14 56.0%	6 42.9% dh	25 59.5%	14 82.4% b	15 57.7%	9 60.0%	9 64.3%	38 71.7% b	
No	13 52.0% e	5 45.5%	9 33.3%	18 45.0% e	3 15.8% ad	15 30.6%	13 39.4%	11 44.0%	8 57.1% dh	17 40.5%	3 17.6% b	11 42.3%	6 40.0%	5 35.7%	15 28.3% b	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

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

Number Mean SD Median	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
How many direct reports do you have?	208 8.73 15.30 5.00	69 10.93 20.34 5.00	49 5.47 3.70 5.00	58 8.75 13.34 6.00	31 9.18 16.95 6.00	75 5.53 4.08 5.00 B	59 14.15 24.29 6.00 A	34 7.03 6.23 6.00	22 9.58 20.06 5.00	13 4.46 2.67 4.00	84 9.64 15.68 6.00	121 8.18 15.26 5.00
How many indirect reports (dotted-line) reports do you have?	184 38.65 89.93 9.00	62 35.02 83.31 9.00	44 29.94 88.80 5.00	50 37.22 76.00 9.00	27 65.20 125.54 12.50	68 16.72 40.78 5.00	54 51.93 108.10 10.00	31 74.69 134.94 23.50	20 27.35 66.09 8.00	10 30.80 60.36 14.00	74 67.27 130.10 16.00	107 19.68 36.67 6.50
						bC	a	A			B	A

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

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

Number Mean SD Median	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
	How many direct reports do you have?	22 6.00 3.34 6.00 J	7 4.43 1.40 4.50	26 10.60 19.21 6.00	6 4.83 2.14 5.00	5 4.00 2.00 5.00	6 4.33 1.63 5.00	23 7.35 5.72 6.50 j	15 7.20 6.67 6.00	18 16.13 30.25 8.00	3 18.00 17.35 23.50 AgkO	12 5.58 2.81 6.00 j	7 19.24 35.13 7.50	30 10.39 18.83 5.00	6 8.50 7.23 6.00
How many indirect reports (dotted-line) reports do you have?	21 27.29 52.31 6.50	5 18.40 26.60 11.50	22 40.64 95.29 9.00	5 23.60 30.66 26.00	4 11.75 9.54 20.00	5 93.00 122.73 74.00	20 84.72 141.50 15.00	15 35.73 82.28 4.00	16 10.69 10.69 7.00	3 4.33 7.51 6.50	11 11.64 10.27 13.00	5 7.20 6.91 9.50	26 58.90 142.37 17.00	5 15.40 19.99 11.50	21 35.05 59.96 12.50
Significance Tests Between Columns:						ik	i		fg		f				

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

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

Number Mean SD Median	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50- 99 B	100- 499 C	500- 999 D	1,000- 2,499 E	2,500- 4,999 F	5000- 9999 G	10,000+ H
	How many direct reports do you have?	23 3.48 2.31 3.00 eFg	13 4.08 2.60 4.00 f	28 5.04 4.58 4.00 g	42 11.20 21.66 5.00	19 13.09 22.21 6.00 a	49 7.16 4.71 6.00 Abg	34 13.89 21.73 8.00 acf	25 3.36 2.29 3.00 dFh	16 2.88 1.54 3.00 Fh	42 5.50 5.39 4.00 dh	16 16.04 25.79 6.00 ac	26 9.49 18.51 5.00	13 8.92 7.20 7.00 AB	14 12.91 24.83 6.00
How many indirect reports (dotted-line) reports do you have?	20 6.80 7.92 4.00 Efg	12 10.83 13.93 5.00	25 6.68 7.95 4.50 EfG	36 12.33 15.35 7.00 eFG	16 28.56 29.13 20.00 ACd	46 65.33 112.79 18.00 acD	29 95.61 155.04 25.00 aCD	22 5.55 6.91 4.00 cDfgH	14 3.29 3.75 2.00 cDfh	36 11.36 11.67 9.00 abFgH	15 18.20 18.99 13.00 AB	22 19.68 32.37 13.00 h	12 51.83 86.50 20.00 abC	13 61.85 119.68 32.50 ac	49 88.42 142.79 19.00 AbCe

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How likely is the current top marketing leader in your company to become the CEO at your or another company?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
1=Not at all	54 25.5%	20 27.8%	15 30.6%	10 16.7%	8 26.7%	19 25.3% c	19 32.2% C	2 5.7% aBde	7 31.8% c	5 33.3% c	19 22.1%	34 27.6%
2	40 18.9%	12 16.7%	12 24.5%	8 13.3%	8 26.7%	18 24.0%	9 15.3%	7 20.0%	4 18.2%	2 13.3%	22 25.6% b	18 14.6% a
3	26 12.3%	11 15.3%	2 4.1% c	10 16.7% b	3 10.0%	7 9.3%	4 6.8% c	8 22.9% b	3 13.6%	3 20.0%	12 14.0%	14 11.4%
4	33 15.6%	9 12.5%	9 18.4%	13 21.7%	2 6.7%	9 12.0% e	9 15.3%	7 20.0%	1 4.5% e	5 33.3% ad	12 14.0%	20 16.3%
5	29 13.7%	11 15.3%	6 12.2%	7 11.7%	5 16.7%	13 17.3%	8 13.6%	6 17.1%	2 9.1%	0 0.0%	12 14.0%	17 13.8%
6	21 9.9%	7 9.7%	3 6.1%	8 13.3%	3 10.0%	6 8.0%	7 11.9%	4 11.4%	3 13.6%	0 0.0%	8 9.3%	13 10.6%
7=Very likely	9 4.2%	2 2.8%	2 4.1%	4 6.7%	1 3.3%	3 4.0%	3 5.1%	1 2.9%	2 9.1%	0 0.0%	1 1.2%	7 5.7%
Mean	3.20	3.11	2.92 c	3.65 b	3.03	3.12	3.19	3.69 e	3.18	2.53 c	3.05	3.28

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 4: Marketing Leadership**

**How likely is the current top marketing leader in your company to become the CEO at your or another company?**

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
1=Not at all	4 18.2% o	2 28.6%	2 8.0% iO	0 0.0% o	1 20.0%	1 20.0%	7 30.4%	4 26.7%	8 40.0% c	0 0.0%	4 33.3%	1 14.3%	7 21.2% o	1 16.7%	12 52.2% aCdm
2	7 31.8% i	1 14.3%	3 12.0% d	3 50.0% cio	2 40.0% i	2 40.0% i	6 26.1%	3 20.0%	1 5.0% adef	1 33.3%	2 16.7%	1 14.3%	5 15.2%	1 16.7%	2 8.7% d
3	2 9.1%	0 0.0%	6 24.0%	0 0.0%	0 0.0%	0 0.0%	3 13.0%	2 13.3%	2 10.0%	0 0.0%	0 0.0% n	2 28.6%	6 18.2%	2 33.3% ko	1 4.3% n
4	2 9.1%	1 14.3%	5 20.0%	0 0.0%	0 0.0%	1 20.0%	2 8.7%	3 20.0%	4 20.0%	0 0.0%	2 16.7%	1 14.3%	9 27.3%	0 0.0%	3 13.0%
5	3 13.6% j	1 14.3%	5 20.0%	1 16.7%	2 40.0% go	1 20.0%	1 4.3% eJ	2 13.3%	3 15.0%	2 66.7% aGkmO	1 8.3% j	1 14.3%	4 12.1% j	1 16.7%	1 4.3% eJ
6	4 18.2%	1 14.3%	2 8.0%	1 16.7%	0 0.0%	0 0.0%	3 13.0%	1 6.7%	2 10.0%	0 0.0%	2 16.7%	1 14.3%	1 3.0%	1 16.7%	2 8.7%
7=Very likely	0 0.0%	1 14.3%	2 8.0%	1 16.7%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	0 0.0%	0 0.0%	1 8.3%	0 0.0%	1 3.0%	0 0.0%	2 8.7%
Mean	3.23	3.71	3.88 o	4.00	3.00	2.80	2.87	2.93	2.95	4.00	3.33	3.43	3.15	3.33	2.70 c

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 4: Marketing Leadership**

**How likely is the current top marketing leader in your company to become the CEO at your or another company?**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
1=Not at all	4 17.4%	6 46.2%	5 18.5%	12 27.9%	5 26.3%	14 28.6%	7 19.4%	5 20.0%	4 25.0%	12 28.6%	2 11.8%	8 29.6%	4 33.3%	6 42.9%	12 20.7%
2	2 8.7% e	1 7.7%	5 18.5%	10 23.3%	7 36.8% a	9 18.4%	5 13.9%	2 8.0% e	3 18.8%	8 19.0%	5 29.4%	10 37.0% agh	2 16.7%	1 7.1% e	9 15.5% e
3	5 21.7%	1 7.7%	4 14.8%	3 7.0%	1 5.3%	5 10.2%	7 19.4%	4 16.0% e	3 18.8% e	6 14.3% e	1 5.9%	0 0.0% abch	1 8.3%	1 7.1%	10 17.2% e
4	5 21.7%	1 7.7%	3 11.1%	5 11.6%	3 15.8%	7 14.3%	9 25.0%	6 24.0% c	3 18.8%	2 4.8% ad	4 23.5% c	3 11.1%	2 16.7%	3 21.4%	10 17.2%
5	1 4.3% c	1 7.7%	8 29.6% a	6 14.0%	2 10.5%	7 14.3%	4 11.1%	2 8.0%	2 12.5%	10 23.8% e	2 11.8%	1 3.7% c	2 16.7%	1 7.1%	9 15.5%
6	3 13.0%	2 15.4%	2 7.4%	5 11.6%	1 5.3%	4 8.2%	4 11.1%	2 8.0%	1 6.3%	4 9.5%	2 11.8%	4 14.8%	1 8.3%	0 0.0%	7 12.1%
7=Very likely	3 13.0% g	1 7.7%	0 0.0%	2 4.7%	0 0.0%	3 6.1%	0 0.0% a	4 16.0% Ch	0 0.0%	0 0.0% Ag	1 5.9%	1 3.7%	0 0.0%	2 14.3% ch	1 1.7% ag
Mean	3.78 e	3.00	3.37	3.14	2.63 a	3.16	3.28	3.80	2.94	3.05	3.53	2.81	2.92	3.00	3.34

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: 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)**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Current	211	73	49	57	31	79	59	33	22	12	85	123
	17.20	16.04	18.39	15.70	21.35	14.89	21.86	15.48	14.95	16.92	20.24	15.20
	17.83	17.86	19.54	14.26	20.81	17.71	21.08	12.86	15.39	16.14	21.57	14.68
						b	a				b	a
Next three years	210	72	49	57	31	79	58	33	22	12	84	123
	44.22	44.40	42.53	42.67	50.10	40.71	50.38	42.12	44.68	42.50	46.40	42.91
	23.73	26.37	22.25	21.57	23.50	22.65	27.71	21.54	21.15	19.94	27.37	21.01
						b	a					

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: 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)**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Current	22 18.86 19.23	7 17.14 9.94	25 14.80 12.40	6 20.00 32.25	5 26.00 31.50	6 7.17 6.27	24 18.04 19.37	16 10.19 10.80	19 11.68 11.77	3 8.33 2.89	11 19.91 26.31	7 13.29 7.78	33 23.18 18.68	6 23.33 24.43	21 17.67 18.16
						m		m	m				fhi		
Next three years	22 47.95 23.79	7 45.71 7.87	25 44.00 19.95	6 37.50 34.89	5 47.00 26.36	6 30.17 17.84	24 46.54 24.67	15 30.33 22.56	19 34.74 23.66	3 38.33 12.58	11 44.09 27.82	7 44.29 16.94	33 53.18 24.25	6 47.50 27.16	21 47.05 24.88
	h					m	h	agMo	m				fHi		h

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: 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)**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Current	24 15.63 13.62	13 23.85 33.74	27 19.48 23.61	44 17.95 14.38	19 11.26 10.81	47 14.21 12.87	36 20.58 19.50	25 15.20 13.65	16 18.44 21.03	43 17.14 22.67	17 26.18 16.40	26 10.69 14.18	14 14.79 13.46	13 16.15 7.12	56 18.07 17.47
								d			aEfg	D	d	d	
Next three years	23 45.35 22.25	13 40.77 34.87	27 44.37 27.13	44 45.80 23.92	19 42.63 17.39	47 40.23 19.29	36 48.58 26.23	24 43.25 18.62	16 45.94 26.72	43 42.81 27.81	17 54.88 20.25	26 36.15 21.72	14 39.64 24.92	13 47.69 17.27	56 45.07 23.01
											E	D			

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: Use of AI in Marketing**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Number	210	73	49	57	30	79	59	33	22	12	84	123
Mean	15.12	15.04	17.10	12.70	17.17	13.47	19.59	11.06	15.00	15.00	17.93	13.28
SD	18.49	19.08	20.10	12.72	23.43	18.02	21.06	11.35	21.99	15.67	21.75	15.89
							c	b				

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: Use of AI in Marketing**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Number	22	6	25	6	5	6	24	16	19	3	11	7	33	6	21
Mean	15.05	9.50	11.72	10.83	27.00	16.83	17.21	8.31	12.89	3.33	18.09	11.71	22.61	23.33	10.71
SD	17.88	10.84	13.50 m	19.60	30.54 ho	19.24	21.47	10.34 em	16.08	2.89	26.04	12.54	22.82 cho	25.63	10.52 em

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: Use of AI in Marketing**

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

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50- 99 B	100- 499 C	500- 999 D	1,000- 2,499 E	2,500- 4,999 F	5000- 9999 G	10,000+ H
Number	24	13	27	44	19	47	35	25	16	43	17	26	14	13	55
Mean	14.38	21.92	21.93	14.52	10.00	11.51	16.66	14.00	17.81	16.65	28.41	7.69	10.21	13.85	13.87
SD	13.78	35.33	27.22	15.70	13.41	11.34	16.96	13.54	17.98	24.04	29.36	11.58	9.99	8.93	14.79
			f			c		d	e		aEfH	bD	d		D

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: Use of AI in Marketing**

**Rate how well your company is managing the following challenges associated with using generative AI in marketing (1=Not at all - 7=Very effectively).**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Implementing security measures to protect customer information	162 4.60 1.97	54 4.80 1.79	42 4.64 2.09	45 4.29 1.94	21 4.71 2.24	58 4.53 1.99	47 5.00 1.62	26 4.46 2.21	15 4.27 2.05	11 3.55 2.50	63 5.06 1.69	96 4.34 2.08
							e			b	b	a
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	162 4.27 1.65	54 4.33 1.49	42 4.48 1.69	45 3.84 1.66	21 4.62 1.86	58 3.98 1.68	47 4.60 1.65	26 4.19 1.52	15 4.00 2.07	11 4.73 1.35	63 4.44 1.56	96 4.16 1.72
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	160 4.17 1.63	54 4.09 1.71	41 4.34 1.54	44 3.95 1.51	21 4.48 1.83	57 3.96 1.59	46 4.39 1.60	26 4.31 1.62	15 3.87 1.88	11 4.09 1.97	62 4.31 1.65	95 4.09 1.64
Understanding how content or decisions are being made	160 4.10 1.61	53 4.34 1.47	42 3.98 1.65	45 3.60 1.53	20 4.85 1.81	56 3.98 1.66	47 4.23 1.45	26 4.31 1.62	15 3.93 1.91	11 3.73 2.10	63 4.19 1.53	94 4.11 1.64
		c		aD C								
Reducing susceptibility to attacks by malicious actors	161 3.99 2.05	53 4.21 1.92	42 3.57 2.12	45 3.80 1.98	21 4.67 2.27	57 3.63 2.02	47 4.62 1.89	26 3.92 2.19	15 3.40 1.99	11 3.45 2.34	63 4.33 2.00	95 3.81 2.05
					b	ad			b			
Minimizing bias and ensuring fairness	160 3.74 1.80	53 3.72 1.54	41 3.66 1.74	45 3.31 1.93	21 4.90 1.87	56 3.41 1.73	47 4.06 1.62	26 4.08 1.76	15 3.80 2.08	11 2.82 2.44	63 3.87 1.56	94 3.73 1.92
		D	d	D	AbC		e			b		
Investing in hiring and building expertise necessary to use generative AI	161 3.44 1.78	54 3.67 1.97	42 3.57 1.63	44 3.11 1.51	21 3.29 2.05	58 3.57 1.82	46 3.57 1.64	26 2.73 1.54	15 2.87 1.73	11 4.27 2.20	63 3.73 1.75	95 3.23 1.80
					c	c	abe			c		
Investing in hardware necessary for generative AI to work well	162 3.20 1.84	54 3.48 2.01	42 3.02 1.75	45 3.02 1.60	21 3.19 2.11	58 3.07 1.85	47 3.51 1.83	26 3.00 1.83	15 3.20 1.57	11 3.09 2.51	63 3.59 1.87	96 2.94 1.81
											b	a

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 5: Use of AI in Marketing**

**Rate how well your company is managing the following challenges associated with using generative AI in marketing (1=Not at all - 7=Very effectively).**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Implementing security measures to protect customer information	18 4.61 2.20	5 3.80 2.68	19 4.32 2.03	3 4.67 2.52	5 4.00 2.24	5 4.80 1.79	17 5.06 1.92	9 3.89 2.09	16 4.13 1.67	2 6.00 1.41	10 4.30 2.31	5 5.40 1.52	29 4.86 1.94	4 6.00 1.41	15 4.67 1.88
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	18 4.56 1.29	5 4.20 1.92	19 4.42 1.30	3 4.00 1.73	5 3.80 1.92	5 3.60 1.52	17 4.71 1.79	9 3.22 1.48	16 3.56 1.50	2 2.00 0.00	10 3.70 2.00	5 4.00 2.12	29 5.03 1.21	4 5.75 1.26	15 4.00 2.14
	hi		h			m	h	acgMn	aMn		m		fHlko	hi	m
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	18 4.50 1.15	5 4.40 1.52	19 4.42 1.22	3 4.00 1.73	5 3.20 2.49	5 3.00 0.71	17 4.65 1.77	9 3.22 1.39	16 3.38 1.67	2 2.00 0.00	9 4.22 1.39	5 4.00 2.12	29 4.72 1.53	4 5.50 1.29	14 3.86 2.03
	fhi		fhi			acmN	hi	acgmn	acgMn				fhI	Fhi	
Understanding how content or decisions are being made	18 4.06 1.63	5 4.80 1.48	19 4.05 1.43	3 3.33 2.08	5 3.80 2.39	5 4.60 0.55	16 4.63 1.63	9 3.33 1.12	15 4.07 1.44	2 4.50 2.12	10 3.30 1.49	5 3.60 2.07	29 4.48 1.64	4 5.50 1.29	15 3.53 1.88
						h	hk	fgn			gn			hk	
Reducing susceptibility to attacks by malicious actors	18 4.11 2.35	5 3.00 2.45	19 4.05 1.99	3 4.00 3.00	5 2.60 2.30	5 4.00 1.87	16 4.38 2.06	9 3.33 2.00	16 3.88 1.59	2 4.50 0.71	10 3.60 1.84	5 4.20 1.64	29 4.14 2.12	4 5.25 2.87	15 4.13 2.29
Minimizing bias and ensuring fairness	17 4.00 1.80	5 4.40 2.19	19 3.79 1.65	3 3.00 1.73	5 4.60 2.07	5 3.80 0.45	16 4.50 1.67	9 3.11 1.27	16 3.13 1.59	2 3.00 0.00	10 3.20 1.75	5 3.00 2.55	29 4.03 1.70	4 5.00 2.71	15 3.07 2.25
							hi	g	g						
Investing in hiring and building expertise necessary to use generative AI	17 3.82 1.74	5 2.80 1.64	19 3.37 1.30	3 2.67 1.53	5 3.20 2.39	5 3.00 0.71	17 4.53 1.81	9 3.11 1.36	16 2.63 1.93	2 2.00 1.41	10 3.50 1.27	5 4.20 2.17	29 3.97 2.04	4 3.25 1.50	15 2.47 1.60
	o		g				cIO		Gm				io		aGm
Investing in hardware necessary for generative AI to work well	18 3.11 1.75	5 2.40 1.14	19 3.21 1.40	3 1.67 1.15	5 3.40 2.51	5 3.60 0.89	17 4.18 2.01	9 2.56 1.33	16 2.88 1.86	2 3.00 0.00	10 2.70 1.49	5 3.40 2.51	29 3.41 2.13	4 4.75 2.63	15 2.73 1.91
				f		d	ho	g							g

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: Use of AI in Marketing**

**Rate how well your company is managing the following challenges associated with using generative AI in marketing (1=Not at all - 7=Very effectively).**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Implementing security measures to protect customer information	18 3.56 1.79 cdfG	8 2.88 1.96 cdfG	21 4.86 2.03 ab	35 4.80 1.94 ab	15 4.53 2.03 E	37 4.84 2.13 ab	28 5.07 1.44 AB	20 3.15 1.90 bCDGH	13 4.54 1.90 a	30 4.73 1.98 A	16 5.38 1.67 Af	16 4.13 2.19 E	11 3.82 2.14 dh	12 5.25 1.82 A	43 5.12 1.71 Af
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	18 4.39 1.42	8 4.25 2.12	21 4.57 1.47	35 4.20 1.81	15 3.67 1.72	37 4.32 1.68	28 4.32 1.56	20 4.55 1.00	13 4.62 2.02	30 4.33 1.90	16 4.56 1.71	16 3.19 1.60	11 3.73 1.01	12 4.25 1.76	43 4.42 1.62
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	18 4.11 1.45	8 4.25 1.98	21 4.33 1.65	34 4.06 1.91	15 3.47 1.73	37 4.30 1.51	27 4.41 1.37	20 4.35 1.14	13 4.15 2.12	30 4.20 1.90	16 4.31 1.85	15 3.13 1.55	11 3.27 1.10	12 4.50 1.45	42 4.50 1.44
Understanding how content or decisions are being made	18 3.94 1.51	8 3.25 2.25 g	21 4.62 1.56	35 3.74 1.74 g	14 3.71 1.68	37 4.22 1.57	27 4.56 1.22 bd	20 3.50 1.64 dh	13 4.15 1.34	30 4.17 1.72 e	16 4.69 1.62 aE	15 2.93 1.75 cDgH	11 4.09 1.14	12 4.58 1.62 e	42 4.36 1.50 aE
Reducing susceptibility to attacks by malicious actors	18 2.94 1.66 ceG	7 1.71 0.95 CDEFG	21 4.57 2.04 aB	35 3.86 1.93 B	15 4.33 2.13 aB	37 4.11 2.27 B	28 4.61 1.77 AB	20 2.75 1.68 cDgH	13 3.92 1.89	29 3.90 2.01 a	16 5.00 1.90 Af	16 3.69 2.06 d	11 3.09 2.26	12 4.67 2.39 a	43 4.40 1.95 A
Minimizing bias and ensuring fairness	18 3.28 1.41 cg	7 3.71 2.87	21 4.29 1.62 a	35 3.57 1.91	14 3.29 2.09	37 3.62 1.74	28 4.25 1.58 a	20 3.20 1.77 h	13 4.31 1.75 e	29 3.83 1.81	15 4.40 1.76 e	16 2.69 2.12 bdH	11 3.27 1.35	12 3.17 1.47	43 4.19 1.71 aE
Investing in hiring and building expertise necessary to use generative AI	18 3.28 1.67	8 3.13 2.53	21 3.38 1.86	35 3.40 1.63 g	15 3.20 1.97	36 3.14 1.68 g	28 4.25 1.69 df	20 3.15 1.50	13 3.15 2.15	30 3.17 1.86	16 4.13 1.59 f	16 3.06 1.61	10 2.60 1.65 dh	12 3.42 2.19 h	43 3.91 1.69 f
Investing in hardware necessary for generative AI to work well	18 2.06 1.16 cfG	8 2.88 2.47 g	21 3.05 1.47 aG	35 3.03 2.05 G	15 2.93 1.91 G	37 3.19 1.70 aG	28 4.50 1.58 AbCDEF	20 2.25 1.41 dH	13 2.15 0.99 dH	30 2.97 1.94 H	16 3.69 2.18 ab	16 3.00 1.75 h	11 2.91 1.76 h	12 2.75 1.60 h	43 4.16 1.74 ABCefg

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: 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:**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Sales productivity	181	64	45	50	21	67	55	29	17	11	74	105
	8.56	6.70	13.76	7.58	5.81	7.03	10.71	4.28	8.53	18.64	9.58	8.00
	14.26	10.88	19.99	12.16	11.39	13.02	15.80	6.62	12.72	24.40	15.57	13.39
		b	a			e	c	bE		aC		
Marketing overhead costs	184	65	45	50	23	68	55	30	18	11	74	107
	10.75	8.54	14.69	9.56	11.70	9.91	12.58	6.27	14.22	14.36	11.26	10.37
	14.66	12.43	18.40	12.41	16.30	14.00	15.96	5.88	16.53	23.38	15.78	14.03
		b	a				c	bd	c			
Customer satisfaction	182	64	45	51	21	67	55	30	17	11	74	106
	8.53	7.25	9.64	7.24	13.14	6.15	12.31	4.00	12.59	11.82	8.93	8.23
	15.10	13.58	16.94	9.71	24.13	13.37	16.38	5.01	21.54	21.25	15.61	14.89
						b	aC	Bd	c			

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 5: 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:**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Sales productivity	15 6.20 8.57	6 19.50 29.49 c	22 5.00 8.86 be	6 3.33 4.08	5 21.00 29.24 cgi	6 8.00 8.37	18 5.39 5.56 e	15 10.13 14.79	18 5.28 6.96 e	2 0.00 0.00	10 18.00 27.71	6 7.50 8.80	32 11.25 14.65	6 7.00 16.19	14 6.07 13.15
Marketing overhead costs	16 9.00 12.41	6 10.83 16.25	22 8.27 7.86 g	6 7.83 9.60	5 5.00 5.00	6 10.83 19.60	18 16.83 17.04 c	15 7.80 16.05	18 8.61 10.68	2 3.00 2.83	10 17.50 27.31	6 15.00 16.12	32 13.31 17.61	6 5.00 6.32	16 9.25 8.81
Customer satisfaction	15 6.47 12.96	6 6.67 8.76	22 6.27 8.07 l	6 2.83 4.02 l	5 7.00 9.75	6 13.33 24.22	18 8.50 11.90	15 3.73 5.12 L	18 3.72 6.18 L	2 2.50 3.54	10 15.50 27.83	6 15.00 11.40 cdHI	32 12.97 22.24	6 10.83 19.60	15 9.33 13.87

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01




**Topic 5: 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:**

Number	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Sales productivity	21 18.00 20.71 dFg	13 17.69 29.41 F	24 8.33 13.08 C	37 7.14 10.47 a	16 6.81 8.53 E	41 4.00 6.23 AB	28 7.29 10.66 a	23 18.78 19.73 EfH	14 8.43 13.98 B	40 9.50 18.49 C	14 11.36 15.39 e	22 2.55 3.98 AdG	12 3.50 4.34 ag	11 12.09 10.00 Efh	44 5.18 8.62 Ag
Marketing overhead costs	21 16.52 20.67 f	13 13.31 25.23 B	25 12.04 16.25 C	37 11.27 13.31 D	16 11.00 15.90 E	43 7.37 7.83 a	28 8.82 9.62 G	23 17.17 19.59 fh	14 10.71 9.78 B	40 13.02 20.05 C	15 11.33 15.73 D	22 8.00 12.85 E	13 4.38 6.32 ag	11 10.91 8.31 f	45 8.53 9.20 a
Customer satisfaction	21 10.71 17.48	13 12.31 24.88	24 9.75 19.87	37 9.41 16.00	16 6.94 9.42	41 6.29 8.74	29 7.48 12.48	23 11.43 16.59 e	14 7.86 13.97	40 11.50 21.04	14 13.57 21.15 e	22 2.55 4.80 adG	12 2.50 5.00 g	11 10.00 8.06 Ef	45 7.40 11.63

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01




**Topic 6: Marketing Jobs**

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Number	210	75	49	56	29	79	59	33	22	13	82	125
Mean	5.37	5.00	5.06	5.13	9.21	7.24	5.46	0.15	5.14	8.46	4.20	6.20
SD	20.50	23.51	17.20	14.51	25.12	22.73	24.17	8.03	14.15	22.21	19.30	21.52

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01




**Topic 6: Marketing Jobs**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Number	21	6	25	6	5	6	23	15	21	3	11	7	34	6	21
Mean	7.05	5.83	3.28	1.67	0.00	-5.00	8.31	10.87	-0.52	25.00	-0.45	8.29	8.50	0.33	5.71
SD	13.13	12.01	13.21	15.06	7.07	16.43	30.12	19.71	15.69	25.00	14.57	24.78	23.99	4.76	28.14
			j						j	cikn	j			j	

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

 **Topic 6: Marketing Jobs**

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

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50- 99 B	100- 499 C	500- 999 D	1,000- 2,499 E	2,500- 4,999 F	5000- 9999 G	10,000+ H
Number	24	13	26	44	19	48	34	25	16	43	17	27	14	13	54
Mean	5.83	10.00	6.50	8.89	3.79	5.48	-0.08	1.60	2.38	8.88	9.18	7.26	15.21	3.46	0.97
SD	20.94	28.28	28.55	19.49	16.80	19.88	10.77	13.90	18.34	25.76	27.37	13.85	25.11	19.19	17.85
				g			d	f					ah		f

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01






**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?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
Number	207	73	49	56	28	79	59	32	20	13	81	123
Mean	4.97	4.43	4.09	5.44	7.14	6.13	4.35	2.10	6.25	8.08	5.09	4.75
SD	9.85	10.06	9.07	9.06	12.17	10.83	9.30	7.41	10.98	9.02	9.70	10.04
								e		c		

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

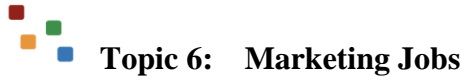


**Topic 6: Marketing Jobs**

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

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Number	21	6	25	6	5	6	23	15	19	3	11	7	34	6	20
Mean	5.21	-0.83	5.12	4.50	4.00	8.33	5.13	6.80	1.26	0.00	4.09	9.28	8.06	5.00	2.07
SD	10.57	4.92	8.77	13.47	5.48	14.36	11.06	9.29	8.73	0.00	11.14	15.11	9.75	4.47	8.27
		m							m				bio		m

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**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?**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Number	23	13	26	42	19	48	34	25	16	40	17	27	14	13	54
Mean	7.23	4.38	6.70	7.52	5.42	4.23	0.03	4.93	3.83	8.40	5.35	6.85	9.28	3.69	0.94
SD	14.46	10.86	10.85	10.54	8.34	7.62	5.80	11.40	12.64	11.78	6.96	8.65	12.43	4.63	6.60
	g		G	G	G	G	aCDEF			H	h	H	H		CdEF

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

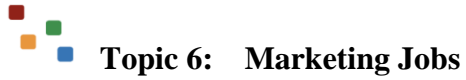


**Topic 6: Marketing Jobs**

**What is your biggest people challenge in your marketing organization?**

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Hiring the best people	87 41.2%	26 35.1%	21 42.9%	29 50.0%	11 37.9%	39 49.4%	22 37.3%	14 42.4%	7 33.3%	4 30.8%	32 39.0%	54 42.9%
Identifying the best people	45 21.3%	14 18.9%	14 28.6%	10 17.2%	6 20.7%	15 19.0%	13 22.0%	8 24.2%	4 19.0%	3 23.1%	16 19.5%	29 23.0%
Retaining the best people	41 19.4%	17 23.0%	8 16.3%	9 15.5%	7 24.1%	13 16.5%	12 20.3%	5 15.2%	5 23.8%	4 30.8%	19 23.2%	21 16.7%
Training the best people	38 18.0%	17 23.0%	6 12.2%	10 17.2%	5 17.2%	12 15.2%	12 20.3%	6 18.2%	5 23.8%	2 15.4%	15 18.3%	22 17.5%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

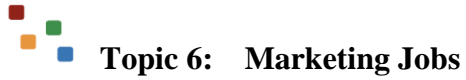


**Topic 6: Marketing Jobs**

**What is your biggest people challenge in your marketing organization?**

	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Hiring the best people	9 40.9%	0 0.0% cehkmn	13 52.0% b	2 33.3%	4 80.0% b	1 16.7%	8 33.3%	8 53.3% b	6 30.0%	0 0.0%	6 54.5% b	3 42.9%	16 47.1% b	4 66.7% b	7 33.3%
Identifying the best people	4 18.2%	3 50.0% c	3 12.0% bd	3 50.0% c	1 20.0%	2 33.3%	7 29.2%	4 26.7%	4 20.0%	0 0.0%	2 18.2%	0 0.0%	6 17.6%	1 16.7%	5 23.8%
Retaining the best people	3 13.6% j	1 16.7%	3 12.0% j	1 16.7%	0 0.0%	1 16.7%	4 16.7%	2 13.3%	4 20.0%	2 66.7% ac	2 18.2%	3 42.9%	9 26.5%	0 0.0%	6 28.6%
Training the best people	6 27.3%	2 33.3%	6 24.0%	0 0.0%	0 0.0%	2 33.3%	5 20.8%	1 6.7%	6 30.0% m	1 33.3%	1 9.1%	1 14.3%	3 8.8% i	1 16.7%	3 14.3%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 6: Marketing Jobs**

**What is your biggest people challenge in your marketing organization?**

	Sales Revenue							Number of Employees							
	<\$10 million A	\$10-25 million B	\$26-99 million C	\$100-499 million D	\$500-999 million E	\$1-9.9 billion F	\$10+ billion G	<50 A	50-99 B	100-499 C	500-999 D	1,000-2,499 E	2,500-4,999 F	5000-9999 G	10,000+ H
Hiring the best people	13 54.2%	5 38.5%	9 33.3%	17 39.5%	7 36.8%	21 42.9%	13 38.2%	14 56.0% b	3 18.8% ae	16 38.1%	6 35.3%	16 59.3% bg	6 40.0%	3 23.1% e	22 40.0%
Identifying the best people	6 25.0%	3 23.1%	5 18.5%	11 25.6%	5 26.3%	8 16.3%	7 20.6%	6 24.0%	5 31.3%	7 16.7%	4 23.5%	7 25.9%	2 13.3%	1 7.7%	13 23.6%
Retaining the best people	2 8.3%	2 15.4%	7 25.9%	9 20.9%	2 10.5%	13 26.5%	6 17.6%	2 8.0% fg	5 31.3% e	8 19.0%	5 29.4% e	1 3.7% bdfG	5 33.3% ae	5 38.5% aE	10 18.2%
Training the best people	3 12.5%	3 23.1%	6 22.2%	6 14.0%	5 26.3%	7 14.3%	8 23.5%	3 12.0%	3 18.8%	11 26.2%	2 11.8%	3 11.1%	2 13.3%	4 30.8%	10 18.2%

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 6: Marketing Jobs**

**For your marketing hiring, distribute 100 points across these different types of employees you plan to hire in the next year:**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Full-time employees	101 77.86 25.18	33 78.76 20.59	21 76.43 32.33	31 75.16 23.88	16 83.13 27.18	41 78.12 24.50	27 79.22 24.37	16 81.56 15.21	8 77.13 27.42	9 66.67 41.53	42 73.48 28.92	56 81.39 21.85
Part-time independent subcontractors	101 9.89 17.59	33 8.03 12.05	21 12.86 22.78	31 12.77 21.38	16 4.25 8.72	41 10.12 16.56	27 4.67 8.29 E	16 9.50 14.17	8 9.50 17.74	9 25.56 35.39 B	42 9.36 16.25	56 9.57 18.24
Full-time independent subcontractors	101 7.81 16.09	33 10.64 14.97 b	21 2.62 10.91 a	31 7.87 15.64	16 8.69 23.33	41 6.07 11.90	27 11.11 20.72	16 5.19 9.45	8 10.88 26.06	9 7.78 17.16	42 10.98 19.05	56 5.86 13.61
Part-time employees	101 4.44 12.70	33 2.58 6.14	21 8.10 22.05	31 4.19 10.73	16 3.94 9.45	41 5.68 16.97	27 5.00 11.18	16 3.75 7.85	8 2.50 4.63	9 0.00 0.00	42 6.19 16.48	56 3.18 9.24

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 6: Marketing Jobs**

**For your marketing hiring, distribute 100 points across these different types of employees you plan to hire in the next year:**

Number Mean SD	Industry Sector														
	Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac- turing I	Mining Construc- tion J	Profes- sional Services K	Real Estate L	Tech Software Platform M	Transpor- tation N	Retail Wholesale O
Full-time employees	13 87.15 24.14 e	1 50.00 ---	14 76.86 17.78 el	3 91.67 10.41	2 40.00 42.43 aco	3 83.33 28.87	11 71.82 28.92	9 76.67 32.31	6 84.83 18.55	0 ---	3 73.33 46.19	3 99.67 0.58 co	22 75.55 27.10	4 70.00 24.49	7 78.57 10.69 el
Part-time independent subcontractors	13 1.69 3.73 ceGknO	1 50.00 ---	14 12.86 18.05 a	3 1.67 2.89	2 15.00 21.21 a	3 0.00 0.00	11 15.45 14.74 A	9 15.56 32.16	6 7.50 9.87	0 ---	3 26.67 46.19 a	3 0.33 0.58 a	22 7.32 15.39	4 8.75 10.31 a	7 11.43 9.00 A
Full-time independent subcontractors	13 6.31 11.38	1 0.00 ---	14 4.57 9.25	3 3.33 2.89 i	2 0.00 0.00	3 0.00 0.00	11 10.91 27.73	9 7.22 12.02	6 0.17 0.41 d	0 ---	3 0.00 0.00	3 0.00 0.00	22 15.32 20.80	4 18.75 23.94	7 5.00 7.64
Part-time employees	13 4.85 11.85 e	1 0.00 ---	14 5.71 14.39 e	3 3.33 5.77	2 45.00 63.64 acghM	3 16.67 28.87 m	11 1.82 4.05 e	9 0.56 1.67 e	6 7.50 9.87	0 ---	3 0.00 0.00	3 0.00 0.00	22 1.82 5.01 Ef	4 2.50 5.00	7 5.00 7.64

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01





**Topic 6: Marketing Jobs**

**For your marketing hiring, distribute 100 points across these different types of employees you plan to hire in the next year:**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Full-time employees	9 47.56 37.85 cDeF	4 60.00 39.16 df	15 74.47 24.89 ad	24 88.33 16.85 Abcg	8 86.88 11.00 a	25 83.60 17.09 Ab	15 72.27 26.51 d	9 52.22 40.86 cEfh	5 63.60 35.67	23 81.74 23.82 a	10 79.80 16.67	15 86.33 17.67 A	8 90.00 12.25 a	6 80.83 12.01	24 77.63 23.18 a
Part-time independent subcontractors	9 34.44 37.45 cDFG	4 17.50 23.63	15 8.07 17.37 a	24 5.21 9.26 A	8 8.75 12.17	25 9.04 11.43 A	15 5.13 8.38 A	9 42.22 35.98 bcDEfgH	5 4.00 8.94 a	23 5.87 11.74 A	10 6.60 12.43 A	15 7.33 11.93 A	8 5.63 10.50 a	6 8.33 7.53 a	24 7.63 10.13 A
Full-time independent subcontractors	9 14.33 18.81	4 0.00 0.00	15 8.80 21.07	24 4.58 11.41	8 3.13 4.58	25 5.36 9.66	15 16.60 25.47	9 5.56 16.67	5 25.80 31.04 Ce	23 4.13 9.85 B	10 10.60 17.66	15 3.33 6.99 b	8 3.13 5.94	6 8.33 11.25	24 10.79 21.13
Part-time employees	9 3.67 11.00	4 22.50 45.00 df	15 8.67 17.67	24 1.88 5.67 b	8 1.25 3.54	25 2.00 4.79 b	15 6.00 9.67	9 0.00 0.00	5 6.60 14.76	23 8.26 22.89	10 3.00 4.83	15 3.00 7.97	8 1.25 3.54	6 2.50 4.18	24 3.96 6.91

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 7: Marketing Performance**

**Rate your company's performance during the prior 12 months: Sales revenue, Profits, Customer acquisition, Customer retention, and Brand value.**

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Brand value	167 8.38 17.87	59 8.39 16.38	42 10.57 21.54	47 6.77 15.79	18 9.56 17.39	66 11.71 21.51	49 4.96 13.33	28 4.32 8.01	15 10.60 26.39	8 10.38 11.43	66 7.97 17.65	99 8.92 18.16
Sales revenue	179 8.34 17.13	62 9.10 19.01	47 8.13 19.21	50 7.94 14.23	19 5.21 8.52	68 10.10 22.48	53 7.32 14.99	30 4.90 8.75 e	17 6.35 10.77	8 13.38 12.41 c	71 7.32 10.52	105 8.92 20.61
Profits	173 7.79 18.18	60 6.18 20.56	46 9.17 21.31	47 9.15 13.57	19 5.00 10.72	66 5.32 20.84	53 8.13 16.96	29 7.62 16.11	15 11.67 13.43	8 15.00 17.74	68 8.81 16.66	103 6.88 19.05
Customer Retention	165 7.73 20.38	60 5.25 18.10	40 13.10 27.54	47 6.34 15.53	17 7.59 20.14	64 12.14 25.55 c	50 5.22 18.46	27 1.41 6.03 a	16 9.19 18.83	7 7.57 14.76	64 6.55 19.15	99 8.45 21.40
Customer acquisition	170 7.46 15.34	61 9.07 18.06	43 8.12 13.99	48 4.71 13.11	17 6.53 13.34	66 7.80 15.80 e	50 7.54 15.99 e	28 3.96 8.89 E	17 4.06 11.51 e	8 22.13 24.91 abCd	66 7.26 12.30	101 7.52 17.25

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 7: Marketing Performance**

**Rate your company's performance during the prior 12 months: Sales revenue, Profits, Customer acquisition, Customer retention, and Brand value.**

Number Mean SD	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthcare	Pharma Biotech	Manufac- turing	Mining Construc- tion	Profes- sional Services	Real Estate	Tech Software Platform	Transpor- tation	Retail Wholesale
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Brand value	19 12.16 15.53 fO	4 4.25 2.99 m	20 5.55 16.93 m	5 8.60 12.30 o	5 20.00 31.02 o	6 -12.67 31.19 ahkm	16 5.88 13.23 fo	12 7.75 8.81 fo	14 4.86 7.86 m	2 -1.00 5.66 m	9 14.00 16.79 fO	7 6.14 7.01 fO	28 18.79 24.95 cfiO	5 7.20 8.17 fO	15 -0.73 8.68 AehKM
Sales revenue	20 10.05 11.93 fi	4 0.00 24.51 f	23 10.09 16.68 f	5 5.00 5.00 f	5 9.40 7.20 f	6 -11.67 35.19 acm	18 9.28 17.79 fj	13 10.15 13.23 fj	16 2.31 8.87 aM	2 -1.50 2.12 m	10 2.90 7.20 m	7 7.86 10.88 fj	28 18.96 23.22 flko	5 4.40 9.94 fj	17 5.12 13.38 m
Profits	20 11.15 14.91 f	4 4.00 33.64 f	21 11.48 18.11 f	5 10.40 13.87 f	5 7.00 9.75 fj	6 -14.33 32.95 acgimo	18 4.72 7.54 fj	13 3.46 16.90 fj	14 4.00 4.40 fj	2 32.50 60.10 gio	9 4.22 10.45 f	7 4.86 8.75 f	28 16.68 25.06 f	5 0.20 7.79 f	16 4.75 8.70 fj
Customer Retention	19 13.05 27.68	3 -3.33 7.64	21 8.29 22.79	5 8.00 8.37 fi	4 10.00 21.60 fi	6 -2.50 4.59 do	15 9.40 27.09	12 9.92 21.35	15 1.27 3.75 d	2 -3.50 9.19	9 12.44 23.95	7 6.29 15.01	28 11.46 24.77	5 2.60 2.51	14 2.64 4.70 f
Customer acquisition	19 5.63 9.08 fm	4 17.25 38.92	21 7.76 16.60	5 10.20 12.05	5 11.00 5.48 flj	6 -7.00 14.44 aehiklm	16 9.06 19.30	12 5.08 6.04 f	15 2.73 5.56 Efm	2 -2.50 3.54 eL	9 5.00 6.48 f	7 6.71 2.63 fj	28 16.86 20.55 afiO	5 8.20 7.19	16 1.19 12.80 M

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01



**Topic 7: Marketing Performance**

**Rate your company's performance during the prior 12 months: Sales revenue, Profits, Customer acquisition, Customer retention, and Brand value.**

Number Mean SD	Sales Revenue							Number of Employees							
	<\$10 million	\$10-25 million	\$26-99 million	\$100-499 million	\$500-999 million	\$1-9.9 billion	\$10+ billion	<50	50- 99	100- 499	500- 999	1,000- 2,499	2,500- 4,999	5000- 9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Brand value	22 14.14 18.85 fG	10 12.40 25.65	22 14.05 31.58	36 8.56 14.65	18 7.72 13.56	35 4.09 11.41 a	24 2.71 5.09 A	23 13.57 19.34 h	13 11.54 19.94	34 9.21 27.41	14 15.21 22.73 h	23 5.61 5.85	11 4.18 6.38	11 5.00 11.12	37 4.86 10.11 ad
Sales revenue	23 12.83 25.70	11 10.91 22.38	23 8.43 25.45	36 9.00 14.68	18 5.28 10.63	41 8.15 12.06	27 4.81 8.96	24 13.42 19.04 h	14 8.14 23.40	35 9.86 24.45	14 7.93 12.87	24 7.71 12.44	12 8.25 8.53	12 10.17 21.26	43 4.53 9.10 a
Profits	23 7.22 24.51	10 5.10 23.05	23 10.04 26.32	36 11.61 18.85	18 4.67 10.81	38 5.89 8.34	25 6.96 15.24	24 13.17 19.47 b	13 -3.62 25.94 a	35 7.63 20.60	14 15.64 24.10	23 6.91 9.60	11 5.09 3.86	12 11.67 20.89	40 5.97 13.77
Customer retention	22 11.36 23.91	10 12.70 25.38	22 8.59 22.36	36 7.17 21.34	18 7.22 19.96	35 6.57 17.78	22 4.18 16.13	23 12.30 25.84	13 8.08 13.91	34 9.12 23.24	14 15.14 32.67	24 2.33 4.07	11 6.73 22.80	11 2.18 6.18	34 6.21 18.21
Customer acquisition	23 13.48 22.84 g	10 11.20 23.27	24 9.38 19.93	36 6.81 14.75	18 3.22 11.86	36 6.61 7.39	23 3.52 5.20 a	24 10.83 16.97	13 9.85 22.61	36 9.39 19.93	14 12.21 22.98	24 3.92 8.51	12 3.58 7.54	11 6.91 8.90	35 4.51 6.74

Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01

## Next Survey: 2026

- Sign up to participate: <https://cmosurvey.org/participate/>
- Review the full history of CMO Survey results from 2008-2025: <https://cmosurvey.org/results/>
- Read Professor Moorman's analysis: <https://cmosurvey.org/blog/>
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- Send comments and suggestions to Professor Christine Moorman: [moorman@duke.edu](mailto:moorman@duke.edu)
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