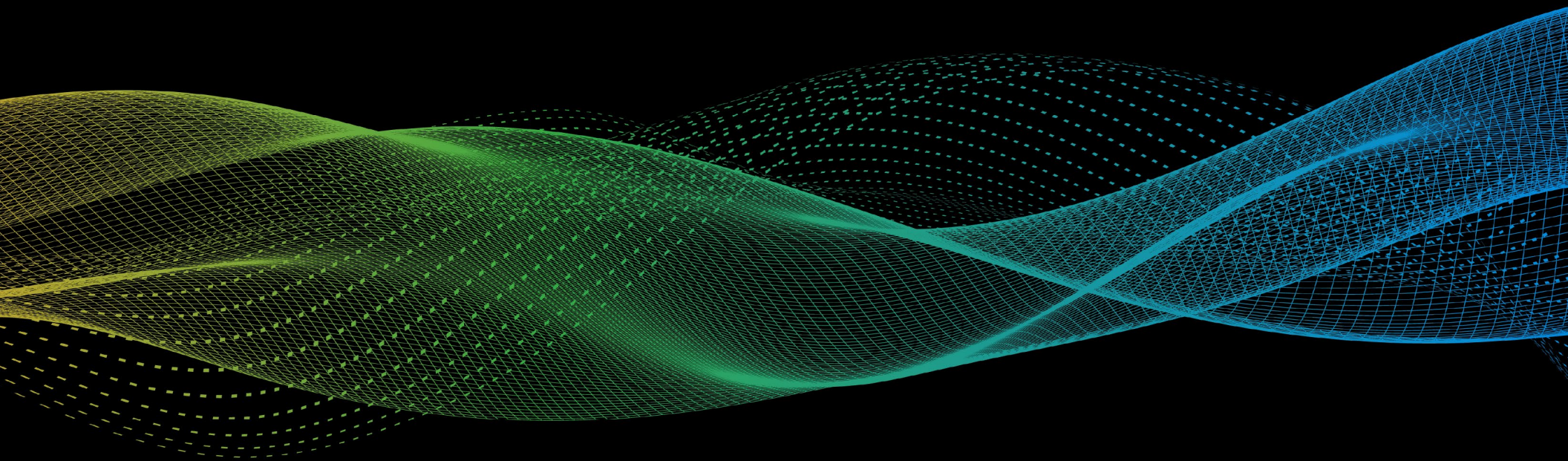


Marketing Contracts Under Economic Pressure Despite Growing Value and AI Gains

Firm and Industry Breakout Report | 2026



Marketing Contracts Under Economic Pressure Despite Growing Value and AI Gains

The 35th Edition of The CMO Survey, 2026

Survey Sample and Administration

- 2111 marketing leaders at U.S. for-profit companies; 308 responded for a 14.6% response rate—97% of respondents are VP-level or above.
- The survey was in the field from January 7-29.

Survey Reports

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

Overview of The CMO Survey[®]

- **Mission:** To collect and disseminate the opinions of marketing leaders 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 once 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:** Duke University's Fuqua School of Business, Deloitte, and the American Marketing Association. Sponsors support The CMO Survey with intellectual and financial resources. Survey data and participant lists are not shared with survey sponsors or any other parties.



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Topic 3: Managing Growth

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Topic 1: Macroeconomic Forecasts and Optimism

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

N=270	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	60 22.2%	18 17.1%	17 24.6%	16 26.2%	9 26.5%	19 18.6%	18 22.8%	10 21.3%	8 36.4%	2 18.2%	23 22.1%	36 21.8%
2=No Change	73 27.0%	34 32.4%	15 21.7%	14 23.0%	10 29.4%	26 25.5%	24 30.4%	11 23.4%	4 18.2%	4 36.4%	28 26.9%	45 27.3%
1=Less	137 50.7%	53 50.5%	37 53.6%	31 50.8%	15 44.1%	57 55.9%	37 46.8%	26 55.3%	10 45.5%	5 45.5%	53 51.0%	84 50.9%
Mean	1.71	1.67	1.71	1.75	1.82	1.63	1.76	1.66	1.91	1.73	1.71	1.71

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

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

N=270

	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
3=More	7 22.6% i	1 8.3%	8 32.0% i	1 11.1%	0 0.0%	1 12.5%	12 38.7% I	4 30.8% i	1 3.8% acGhkLN	0 0.0%	6 30.0% i	3 42.9% I	10 20.0%	4 44.4% I	2 12.5%
2=No Change	8 25.8% i	3 25.0%	6 24.0% i	5 55.6% gmo	4 57.1% go	2 25.0%	5 16.1% del	3 23.1%	14 53.8% acGMo	0 0.0%	6 30.0%	1 14.3%	11 22.0% dl	2 22.2%	2 12.5% dei
1=Less	16 51.6%	8 66.7%	11 44.0%	3 33.3%	3 42.9%	5 62.5%	14 45.2%	6 46.2%	11 42.3% o	3 100.0%	8 40.0% o	3 42.9%	29 58.0%	3 33.3%	12 75.0% ik
Mean	1.71	1.42	1.88	1.78	1.57	1.50	1.94 o	1.85	1.62	1.00	1.90	2.00	1.62	2.11 o	1.38 gn

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

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

N=270

	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 24.3%	7 30.4%	7 25.9%	8 14.5% g	6 27.3%	9 13.8% g	13 36.1% df	14 33.3%	7 26.9%	8 17.4%	4 14.3%	6 18.2%	3 12.5%	2 11.1%	16 30.2%
2=No Change	12 32.4%	5 21.7%	8 29.6%	17 30.9%	4 18.2%	21 32.3%	6 16.7%	10 23.8%	9 34.6% f	12 26.1%	10 35.7% f	11 33.3% f	2 8.3% bdeg	7 38.9% f	12 22.6%
1=Less	16 43.2%	11 47.8%	12 44.4%	30 54.5%	12 54.5%	35 53.8%	17 47.2%	18 42.9% F	10 38.5% F	26 56.5%	14 50.0% f	16 48.5% f	19 79.2% ABdeh	9 50.0%	25 47.2% f
Mean	1.81	1.83	1.81	1.60	1.73	1.60	1.89	1.90 F	1.88 f	1.61	1.64	1.70	1.33 Abh	1.61	1.83 f

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



Topic 1: Macroeconomic Forecasts and Optimism

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 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	104	69	59	34	101	78	47	22	11	103	163
Mean	56.78	56.21	56.51	58.36	56.80	58.08	56.87	51.90	57.95	54.82	57.25	56.39
SD	20.43	20.29	21.50	19.92	20.37	20.52	20.98	19.68	19.44	22.32	21.11	20.08

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

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	30	12	24	9	7	8	31	13	26	3	20	7	50	9	15
Mean	58.33	47.75	59.59	55.00	47.01	68.75	61.10	60.62	50.04	38.33	60.85	69.29	54.60	57.78	56.00
SD	19.97	17.12	21.30	21.36	31.81	21.00	21.53	19.31	15.88	7.64	21.13	12.05	21.61	20.92	17.24
		fL				bij	i		fgL	fL		BIJ			

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Topic 1: Macroeconomic Forecasts and Optimism

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	37	23	27	55	22	64	34	42	26	46	28	33	23	18	51
Mean	55.78	57.83	55.08	55.20	62.05	56.99	57.94	58.05	55.39	54.61	57.14	57.82	52.70	56.89	59.32
SD	19.93	23.49	25.14	21.29	17.71	17.31	21.95	21.08	24.36	21.54	19.12	21.36	19.30	16.64	19.28

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



Topic 1: Macroeconomic Forecasts and Optimism

How have you adjusted your prices in response to potential tariff impacts?

N=308

	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
Higher prices	95 35.6%	46 44.2% B	12 17.6% AC	25 41.7% B	12 35.3%	24 23.5% BC	38 48.7% Ae	22 46.8% Ae	7 31.8%	1 9.1% bc	39 38.6%	56 33.9%
Lower prices	8 3.0%	2 1.9%	3 4.4%	2 3.3%	1 2.9%	2 2.0%	2 2.6%	3 6.4%	1 4.5%	0 0.0%	0 0.0% b	8 4.8% a
No impact	130 48.7%	39 37.5% B	43 63.2% A	28 46.7%	19 55.9%	63 61.8% BC	26 33.3% AdE	18 38.3% Ae	13 59.1% b	9 81.8% Bc	44 43.6%	85 51.5%
No impact yet, but we expect to raise prices this year	34 12.7%	17 16.3%	10 14.7%	5 8.3%	2 5.9%	13 12.7%	12 15.4%	4 8.5%	1 4.5%	1 9.1%	18 17.8%	16 9.7%
No impact yet, but we expect to lower prices this year	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 1: Macroeconomic Forecasts and Optimism

How have you adjusted your prices in response to potential tariff impacts?

N=308

	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
Higher prices	2 6.5% CDFghlmN O	3 25.0% IO	12 48.0% AiKl	6 66.7% AgKlm	1 14.3% IO	4 50.0% AKl	9 29.0% adlknO	4 33.3% alko	21 80.8% ABcEGHK LM	1 33.3%	1 5.0% CDFghlmN O	0 0.0% cdflnO	13 26.5% adlknO	6 66.7% AgKlm	12 80.0% ABEGhKL M
Lower prices	0 0.0% e	1 8.3%	1 4.0%	1 11.1%	1 14.3% ag	0 0.0%	0 0.0% e	0 0.0%	1 3.8%	0 0.0%	1 5.0%	0 0.0%	1 2.0%	0 0.0%	1 6.7%
No impact	25 80.6% bCDfgIJmN O	5 41.7% ai	8 32.0% AiKl	2 22.2% Akl	5 71.4% Io	3 37.5% ai	17 54.8% aIo	8 66.7% IO	2 7.7% AbcEfGHK LM	0 0.0% Akl	15 75.0% CdljnO	6 85.7% cdljO	26 53.1% aIO	3 33.3% Ak	2 13.3% AegHKLM
No impact yet, but we expect to raise prices this year	4 12.9% j	3 25.0%	4 16.0%	0 0.0% j	0 0.0% j	1 12.5%	5 16.1% j	0 0.0% J	2 7.7% J	2 66.7% adegHlnO	3 15.0%	1 14.3%	9 18.4%	0 0.0% j	0 0.0% J
No impact yet, but we expect to lower prices this year	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 1: Macroeconomic Forecasts and Optimism

How have you adjusted your prices in response to potential tariff impacts?

N=308

	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
Higher prices	8 21.6% fg	7 30.4%	7 25.9%	17 30.9%	10 45.5%	30 46.2% a	16 48.5% a	9 21.4% FH	5 19.2% fH	17 37.0%	6 21.4% fh	14 42.4%	13 54.2% Abd	5 27.8%	26 52.0% ABd
Lower prices	1 2.7%	1 4.3%	1 3.7%	1 1.8%	1 4.5%	2 3.1%	1 3.0%	1 2.4%	2 7.7%	0 0.0%	1 3.6%	1 3.0%	1 4.2%	1 5.6%	1 2.0%
No impact	20 54.1%	13 56.5%	19 70.4% eFg	27 49.1%	9 40.9% c	25 38.5% C	13 39.4% c	23 54.8% Fh	18 69.2% FH	26 56.5% Fh	16 57.1% fh	15 45.5%	5 20.8% ABCdg	11 61.1% fh	16 32.0% aBcdg
No impact yet, but we expect to raise prices this year	8 21.6% c	2 8.7%	0 0.0% ad	10 18.2% c	2 9.1%	8 12.3%	3 9.1%	9 21.4% c	1 3.8%	3 6.5% a	5 17.9%	3 9.1%	5 20.8%	1 5.6%	7 14.0%
No impact yet, but we expect to lower prices this year	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%

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

How have tariffs impacted your business investments?

N=308

	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
Higher investments	15 5.7%	4 3.9%	3 4.5%	7 11.9%	1 2.9%	5 5.1%	4 5.1%	4 8.7%	2 9.1%	0 0.0%	9 9.1%	6 3.7%
Lower investments	57 21.6%	26 25.2%	9 13.4% c	17 28.8% b	5 14.7%	12 12.1% B	27 34.6% Ad	11 23.9%	2 9.1% b	1 9.1%	22 22.2%	34 20.7%
No impact	160 60.6%	57 55.3%	45 67.2%	32 54.2%	25 73.5%	66 66.7% b	37 47.4% aE	28 60.9%	15 68.2%	10 90.9% B	54 54.5%	106 64.6%
No impact yet, but we expect to lower investments this year	23 8.7%	10 9.7%	8 11.9%	2 3.4%	3 8.8%	11 11.1%	6 7.7%	3 6.5%	3 13.6%	0 0.0%	8 8.1%	15 9.1%
No impact yet, but we expect to increase investments this year	9 3.4%	6 5.8%	2 3.0%	1 1.7%	0 0.0%	5 5.1%	4 5.1%	0 0.0%	0 0.0%	0 0.0%	6 6.1%	3 1.8%

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

Topic 1: Macroeconomic Forecasts and Optimism

How have tariffs impacted your business investments?

N=308

	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
Higher investments	0 0.0% bFn	2 16.7% am	1 4.0%	1 11.1%	0 0.0%	2 25.0% Akm	3 9.7%	1 8.3%	1 3.8%	0 0.0%	0 0.0% fn	0 0.0%	1 2.1% bfn	2 22.2% akm	1 6.7%
Lower investments	1 3.2% CgljmO	1 8.3% c	12 48.0% Abfkm	1 11.1%	1 14.3%	0 0.0% cio	8 25.8% a	2 16.7%	10 38.5% Afk	1 33.3% a	2 10.5% ci	1 14.3%	9 19.1% ac	2 22.2%	6 40.0% Af
No impact	27 87.1% CdglJmnO	9 75.0% ij	11 44.0% AK	5 55.6% a	5 71.4%	5 62.5%	18 58.1% a	8 66.7%	9 34.6% AbKm	0 0.0% AbKm	16 84.2% CIJo	4 57.1%	30 63.8% aij	5 55.6% a	6 40.0% Ak
No impact yet, but we expect to lower investments this year	2 6.5%	0 0.0%	0 0.0% diJ	2 22.2% c	1 14.3%	0 0.0%	2 6.5%	0 0.0%	5 19.2% c	1 33.3% C	1 5.3%	1 14.3%	5 10.6%	0 0.0%	2 13.3%
No impact yet, but we expect to increase investments this year	1 3.2% j	0 0.0%	1 4.0%	0 0.0%	0 0.0%	1 12.5%	0 0.0% Jl	1 8.3%	1 3.8%	1 33.3% aGkmo	0 0.0% j	1 14.3% g	2 4.3% j	0 0.0%	0 0.0% j

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Topic 1: Macroeconomic Forecasts and Optimism

How have tariffs impacted your business investments?

N=308

	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
Higher investments	0 0.0% g	2 9.1%	0 0.0% g	1 1.8% g	1 4.5%	6 9.4%	5 15.2% acd	0 0.0% H	1 3.8%	2 4.4%	0 0.0% h	1 3.1%	2 8.3%	1 5.9%	8 16.0% Ad
Lower investments	5 13.5%	3 13.6%	6 23.1%	11 20.0%	6 27.3%	16 25.0%	9 27.3%	7 16.7%	3 11.5%	9 20.0%	8 28.6%	10 31.3% g	5 20.8%	1 5.9% e	14 28.0%
No impact	28 75.7% Fg	13 59.1%	16 61.5%	38 69.1% f	13 59.1%	31 48.4% Ad	17 51.5% a	29 69.0% h	18 69.2% h	31 68.9% h	16 57.1%	18 56.3%	13 54.2%	13 76.5% h	22 44.0% abcg
No impact yet, but we expect to lower investments this year	3 8.1%	4 18.2% d	3 11.5%	2 3.6% b	1 4.5%	8 12.5%	2 6.1%	5 11.9%	4 15.4% c	1 2.2% b	1 3.6%	3 9.4%	3 12.5%	0 0.0%	6 12.0%
No impact yet, but we expect to increase investments this year	1 2.7%	0 0.0%	1 3.8%	3 5.5%	1 4.5%	3 4.7%	0 0.0%	1 2.4%	0 0.0%	2 4.4%	3 10.7% h	0 0.0%	1 4.2%	2 11.8% h	0 0.0% dg

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

How are you changing your customer targeting strategy in response to economic shifts over the last year?

N=268

	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
Increase our focus on building loyalty/retention of existing customers	117 43.7%	45 43.3%	29 42.0%	24 40.0%	19 55.9%	42 41.2%	37 46.8%	26 56.5%	6 27.3%	3 27.3%	53 51.5%	63 38.4%
								d	c		b	a
Increase our focus on new segments in our current geographic markets	93 34.7%	32 30.8%	27 39.1%	21 35.0%	12 35.3%	37 36.3%	27 34.2%	15 32.6%	8 36.4%	2 18.2%	47 45.6%	45 27.4%
											B	A
Increase our focus on premium or less price-sensitive segments	89 33.2%	29 27.9%	19 27.5%	26 43.3%	15 44.1%	32 31.4%	22 27.8%	18 39.1%	10 45.5%	4 36.4%	32 31.1%	56 34.1%
		c		a								
No change in our targeting strategy	71 26.5%	35 33.7%	23 33.3%	5 8.3%	8 23.5%	36 35.3%	15 19.0%	8 17.4%	6 27.3%	4 36.4%	22 21.4%	49 29.9%
		C	C	ABd	c	bc	a	a				
Increase our focus on value-driven or more price-sensitive segments	71 26.5%	21 20.2%	15 21.7%	29 48.3%	6 17.6%	13 12.7%	28 35.4%	16 34.8%	7 31.8%	3 27.3%	23 22.3%	48 29.3%
		C	C	ABD	C	BCd	A	A	a			
Increase our focus on expanding into new geographic markets	52 19.4%	13 12.5%	22 31.9%	12 20.0%	5 14.7%	21 20.6%	10 12.7%	12 26.1%	5 22.7%	2 18.2%	25 24.3%	27 16.5%
		B	A									

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

Topic 1: Macroeconomic Forecasts and Optimism

How are you changing your customer targeting strategy in response to economic shifts over the last year?

N=268

	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
Increase our focus on building loyalty/retention of existing customers	14 45.2% c	6 50.0% c	4 16.0% abGkMO	3 33.3%	2 28.6%	3 37.5%	16 51.6% C	4 30.8%	10 38.5%	2 66.7%	10 50.0% c	2 28.6%	24 49.0% C	4 50.0%	11 68.8% C
Increase our focus on new segments in our current geographic markets	8 25.8% l	1 8.3% fln	10 40.0%	1 11.1% fl	2 28.6%	5 62.5% bd	11 35.5%	5 38.5%	9 34.6%	1 33.3%	8 40.0%	5 71.4% abdm	14 28.6% l	4 50.0% b	6 37.5%
Increase our focus on premium or less price-sensitive segments	13 41.9% ko	8 66.7% eGiKmO	11 44.0% ko	5 55.6% ko	1 14.3% b	2 25.0%	7 22.6% Bh	7 53.8% gko	8 30.8% b	0 0.0%	3 15.0% aBcdh	3 42.9%	15 30.6% b	3 37.5%	2 12.5% aBcdh
No change in our targeting strategy	9 29.0% o	2 16.7%	5 20.0%	2 22.2%	2 28.6% o	2 25.0% o	10 32.3% o	3 23.1%	10 38.5% O	1 33.3% o	8 40.0% O	2 28.6% o	14 28.6% o	1 12.5%	0 0.0% aefgljKlm
Increase our focus on value-driven or more price-sensitive segments	6 19.4% eo	5 41.7%	10 40.0% m	3 33.3%	4 57.1% akm	1 12.5%	8 25.8% o	3 23.1%	5 19.2% o	0 0.0%	3 15.0% eo	2 28.6%	9 18.4% ceO	2 25.0%	9 56.3% agikM
Increase our focus on expanding into new geographic markets	5 16.1% l	2 16.7%	6 24.0%	1 11.1%	0 0.0% l	2 25.0%	7 22.6%	3 23.1%	5 19.2%	0 0.0%	3 15.0% l	4 57.1% aekM	5 10.2% Ln	3 37.5% m	4 25.0%

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

 **Topic 1: Macroeconomic Forecasts and Optimism**

How are you changing your customer targeting strategy in response to economic shifts over the last year?

N=268

	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
Increase our focus on building loyalty/retention of existing customers	7 18.9% BdFG	13 56.5% A	10 37.0%	24 43.6% a	9 42.9%	32 49.2% A	20 57.1% A	9 21.4% BeFGH	14 53.8% A	17 37.0% fg	9 32.1% fg	16 50.0% a	15 62.5% Acd	12 66.7% Acd	25 48.1% A
Increase our focus on new segments in our current geographic markets	8 21.6%	7 30.4%	8 29.6%	22 40.0%	8 38.1%	21 32.3%	15 42.9%	11 26.2% d	11 42.3%	12 26.1% d	14 50.0% ac	11 34.4%	6 25.0%	7 38.9%	21 40.4%
Increase our focus on premium or less price-sensitive segments	13 35.1%	9 39.1%	6 22.2%	17 30.9%	6 28.6%	23 35.4%	14 40.0%	16 38.1%	11 42.3%	10 21.7% f	8 28.6%	6 18.8% f	12 50.0% ce	7 38.9%	19 36.5%
No change in our targeting strategy	19 51.4% DeFG	7 30.4% g	9 33.3% g	13 23.6% A	5 23.8% a	14 21.5% A	3 8.6% Abc	16 38.1% fgh	6 23.1%	19 41.3% fgh	6 21.4%	10 31.3%	3 12.5% ac	2 11.1% ac	9 17.3% ac
Increase our focus on value-driven or more price-sensitive segments	4 10.8% EG	5 21.7% g	5 18.5% g	14 25.5% g	9 42.9% A	16 24.6% g	17 48.6% Abcdf	7 16.7% h	5 19.2%	11 23.9%	8 28.6%	7 21.9%	8 33.3%	4 22.2%	21 40.4% a
Increase our focus on expanding into new geographic markets	5 13.5%	0 0.0% DefG	3 11.1%	15 27.3% B	5 23.8% b	13 20.0% b	10 28.6% B	3 7.1% dfg	3 11.5%	9 19.6%	7 25.0% a	7 21.9%	7 29.2% a	5 27.8% a	11 21.2%

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

 **Topic 2: Marketing Technology and AI**

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Selecting the right company to provide marketing technologies	195 4.86 1.43	78 4.87 1.41	53 5.06 1.42 c	44 4.43 1.48 b	20 5.20 1.32	76 5.03 1.44 b	56 4.48 1.51 a	36 4.97 1.32	17 4.82 1.19	5 5.40 1.14	80 4.82 1.46	114 4.88 1.43
Selecting the right mix of marketing technologies for our needs	196 4.84 1.47	79 4.84 1.40	53 5.13 1.48 C	44 4.32 1.54 Bd	20 5.25 1.37 c	76 5.03 1.49 b	56 4.36 1.55 ae	36 4.94 1.39	17 4.88 1.05	5 5.80 1.10 b	81 4.80 1.48	114 4.86 1.48
Integrating marketing technologies into our customer funnel	194 4.76 1.35	78 4.67 1.41	53 4.81 1.26	43 4.63 1.33	20 5.25 1.33	75 4.91 1.51	55 4.47 1.20	36 4.56 1.32	17 5.12 1.05	5 5.40 0.89	79 4.81 1.39	114 4.72 1.33
Leveraging data from marketing technologies for tactical decision making	196 4.76 1.45	79 4.63 1.41	53 4.92 1.55	44 4.52 1.47 d	20 5.30 1.13 c	76 4.84 1.55 b	56 4.29 1.44 aDE	36 4.75 1.36 e	17 5.29 0.85 Be	5 6.20 0.84 Bcd	81 4.73 1.52	114 4.77 1.40
Leveraging data from marketing technologies for strategic decision making	194 4.63 1.48	78 4.55 1.45	53 4.75 1.60	43 4.37 1.40 d	20 5.20 1.36 c	74 4.72 1.62 b	56 4.14 1.34 acDE	36 4.75 1.40 b	17 5.12 0.86 B	5 6.00 1.41 B	81 4.42 1.56	112 4.79 1.41
Designing the broad architecture of our marketing technology systems	195 4.56 1.49	79 4.63 1.39 c	53 4.72 1.51 c	43 4.02 1.54 abd	20 5.00 1.52 c	76 4.72 1.50	56 4.20 1.54 e	36 4.50 1.42 e	16 4.56 1.09 e	5 6.00 1.00 bcd	81 4.44 1.56	113 4.64 1.45
Generating ROI from marketing technologies	194 4.53 1.62	77 4.35 1.55	53 4.87 1.75	44 4.20 1.59 d	20 5.05 1.39 c	75 4.79 1.69 Be	55 3.85 1.52 ADE	36 4.39 1.52 E	17 5.00 1.12 Be	5 6.40 0.55 aBCd	80 4.49 1.64	113 4.56 1.62
Developing capabilities for using marketing technologies	192 4.50 1.53	76 4.26 1.54 Bd	53 5.04 1.32 AC	43 3.98 1.68 BD	20 5.10 1.12 aC	73 4.82 1.51 B	55 3.91 1.51 Ade	36 4.39 1.34	17 4.82 1.42 b	5 5.40 1.14 b	79 4.48 1.53	112 4.51 1.54
Demonstrating ROI from marketing technologies	195 4.36 1.60	78 4.23 1.53 d	53 4.64 1.68	44 3.98 1.68 d	20 5.00 1.26 ac	75 4.61 1.60 B	56 3.73 1.51 ADE	36 4.08 1.61 De	17 5.29 0.99 BC	5 6.00 1.00 Bc	81 4.23 1.64	113 4.45 1.58

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

 **Topic 2: Marketing Technology and AI**

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Integrating marketing technologies across other data systems in our company	196 4.04 1.55	79 4.08 1.38 c	53 4.21 1.59 c	44 3.50 1.64 abd	20 4.65 1.63 c	76 4.17 1.55	56 3.70 1.46	36 3.97 1.48	17 4.12 1.62	5 5.00 1.22	81 4.22 1.64	114 3.90 1.48
Training current employees on emerging marketing Technologies	194 3.94 1.63	78 3.77 1.64	53 4.25 1.71	44 3.61 1.50 d	19 4.53 1.50 c	75 4.19 1.75 b	55 3.45 1.48 a	36 4.00 1.47	17 3.82 1.47	5 4.40 1.95	80 4.09 1.63	113 3.83 1.64
Hiring to manage marketing Technologies	194 3.68 1.69	78 3.63 1.76 d	52 3.77 1.78	44 3.23 1.43 D	20 4.65 1.42 aC	74 3.80 1.87	56 3.32 1.61	36 3.81 1.47	17 4.00 1.46	5 3.80 2.05	81 3.75 1.74	112 3.63 1.68

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

Topic 2: Marketing Technology and AI

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Selecting the right company to provide marketing technologies	25 5.12 0.97 C	10 4.60 2.01 B	17 3.76 1.64 AglMno	4 5.25 0.50 D	5 5.20 1.10 E	6 5.00 2.10 F	21 5.00 1.48 G	10 4.90 1.60 H	18 4.39 1.54 I	3 5.33 0.58 J	13 4.69 1.60 K	4 5.75 1.26 L	40 5.00 1.22 C	7 5.29 0.95 c	12 5.17 1.53 c
Selecting the right mix of marketing technologies for our needs	25 5.20 0.91 BCI	10 3.70 1.34 AEgLMno	17 3.65 1.87 AegLMno	4 4.75 0.96 D	5 6.00 1.00 Bci	6 5.00 2.19 F	21 5.05 1.50 bc	10 4.50 1.51 H	19 4.16 1.57 AelM	3 5.33 0.58 J	13 4.77 1.48 K	4 6.00 0.82 Bci	40 5.25 1.21 BCI	7 5.43 1.13 bc	12 5.08 1.44 bc
Integrating marketing technologies into our customer funnel	25 4.80 1.15	10 4.30 1.34	16 4.25 1.18 lm	4 4.75 0.96	5 5.20 1.30	6 4.83 2.14	21 4.76 1.64	10 5.00 1.49	18 4.28 1.56 m	3 4.33 0.58	13 4.54 1.33	4 5.75 1.26 c	40 5.20 1.26 ci	7 4.29 0.95	12 4.83 1.03
Leveraging data from marketing technologies for tactical decision making	25 4.96 1.49 c	10 4.90 1.45	17 3.88 1.50 aelM	4 5.25 0.96	5 5.80 1.30 ci	6 5.17 2.14	21 4.62 1.53	10 5.10 1.52	19 4.16 1.38 em	3 4.67 1.53	13 4.62 1.33	4 5.75 1.50 c	40 5.03 1.25 Ci	7 4.29 1.25	12 4.75 1.48
Leveraging data from marketing technologies for strategic decision making	25 4.80 1.47 c	10 4.80 1.32	17 3.71 1.49 aelm	4 5.00 0.82 j	5 5.80 1.79 c	6 4.67 2.07	20 4.55 1.67	10 4.70 1.57	19 4.53 1.35	3 3.00 1.00 dlmn	13 4.77 1.42	4 5.75 1.50 cj	40 4.72 1.38 cj	7 4.57 0.98 j	11 4.73 1.62
Designing the broad architecture of our marketing technology systems	24 4.88 0.80	10 3.10 1.52	17 3.29 1.61	4 4.75 0.50	5 6.00 1.00	6 4.83 2.04	21 4.86 1.77	10 4.20 1.75	19 4.05 1.43	3 4.00 1.00	13 4.15 1.41	4 5.50 1.29	40 5.15 1.19	7 5.29 1.11	12 4.58 1.08
Generating ROI from marketing technologies	25 4.84 1.34 ci	10 4.60 1.96	17 3.53 1.81 aegM	4 4.25 0.50	5 5.40 1.52 c	6 5.00 2.00	20 4.65 1.53 c	10 4.40 1.71	19 3.79 1.72 aM	3 3.33 2.31	13 4.38 1.71	4 4.75 2.63	39 4.97 1.39 CI	7 4.71 1.50	12 4.67 1.37
Developing capabilities for using marketing technologies	25 4.80 1.29 C	10 3.80 1.81 m	16 3.44 1.63 AkMn	4 4.75 0.96	5 5.00 1.73	6 4.00 1.67	20 4.40 1.67	10 4.60 1.71	19 4.00 1.83 m	3 3.33 1.15 mn	13 4.85 1.21 c	4 5.25 2.06	38 4.95 1.21 bCij	7 5.00 1.00 cj	12 4.67 1.56

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

Topic 2: Marketing Technology and AI

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Demonstrating ROI from marketing technologies	25 4.60 1.19 c	10 4.10 1.97	17 3.53 1.97 am	4 4.50 1.00	5 5.00 2.12	6 5.00 2.00	20 4.40 1.47	10 4.10 1.79	19 3.74 1.73 m	3 3.67 2.89	13 4.08 1.61	4 5.00 1.83	40 4.75 1.39 ci	7 4.71 1.50	12 4.58 1.24
Integrating marketing technologies across other data systems in our company	25 3.84 1.43	10 3.10 1.66 Mn	17 3.24 1.48 hMn	4 3.75 0.96	5 4.80 1.48	6 4.00 1.67	21 4.10 1.70	10 4.60 1.71 c	19 3.68 1.53 m	3 2.67 0.58 mN	13 4.23 1.59	4 4.75 2.22	40 4.57 1.47 BCij	7 4.57 0.79 bcJ	12 4.00 1.41
Training current employees on emerging marketing technologies	25 4.08 1.44 c	10 3.50 1.96	17 3.00 1.27 aeIMN	4 4.00 0.82	5 5.00 2.35 c	6 3.50 1.64	20 3.95 1.61	10 3.90 1.79	19 3.16 1.74 IM	3 3.33 1.15	12 4.00 1.91	4 5.25 2.06 ci	40 4.45 1.47 CI	7 4.57 0.79 C	12 3.92 1.73
Hiring to manage marketing technologies	25 4.32 1.52 bCI	9 3.00 1.58 ad	17 2.76 1.30 ADIMn	4 5.00 1.15 bCi	5 3.20 1.30	6 4.00 1.79	20 3.70 1.63	10 3.60 1.26	19 2.63 1.92 AdMn	3 3.00 2.00	13 3.46 2.11	4 4.75 2.22 c	40 4.13 1.64 CI	7 4.29 1.25 ci	12 3.67 1.61

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

Topic 2: Marketing Technology and AI

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Selecting the right company to provide marketing technologies	25 4.40 1.58 bd	18 5.28 1.07 a	22 4.68 1.64	43 5.21 1.15 a	17 4.53 1.77	48 4.77 1.39	20 4.90 1.59	30 4.70 1.58	20 4.90 1.48	33 4.82 1.16	23 5.35 1.30 G	26 4.85 1.64	20 4.65 1.84	11 4.09 1.14 Dh	32 5.06 1.19 g
Selecting the right mix of marketing technologies for our needs	25 4.08 1.58 bDf	18 5.28 1.23 a	23 4.96 1.46	43 5.12 1.24 A	17 4.47 1.87	48 4.92 1.47 a	20 4.75 1.52	30 4.40 1.59	20 5.05 1.50	34 4.85 1.33	23 5.13 1.10	26 4.88 1.84	20 4.75 1.80	11 4.55 1.44	32 5.03 1.20
Integrating marketing technologies into our customer funnel	24 4.58 1.25	18 5.28 1.13 ef	22 4.73 1.28	43 5.14 1.04 ef	17 4.24 1.56 bd	48 4.54 1.34 bd	20 4.70 1.75	29 4.66 1.14 d	19 5.00 1.33	34 4.94 1.23	23 5.30 1.06 aEFg	26 4.35 1.35 D	20 4.25 1.37 D	11 4.27 1.85 d	32 4.94 1.48
Leveraging data from marketing technologies for tactical decision making	25 4.20 1.38 bcD	18 5.11 1.41 ae	23 5.04 1.49 a	43 5.30 1.06 AEF	17 4.00 1.77 bD	48 4.58 1.32 D	20 4.70 1.66	30 4.47 1.53 d	20 4.65 1.69	34 5.12 1.25	23 5.26 0.96 ag	26 4.50 1.70	20 4.80 1.51	11 4.36 1.50 d	32 4.66 1.38
Leveraging data from marketing technologies for strategic decision making	24 4.54 1.41	18 5.22 1.52 f	23 4.48 1.62	43 5.09 1.31 F	16 4.25 1.81	48 4.31 1.34 bD	20 4.50 1.43	29 4.69 1.49	20 4.80 1.88	34 4.65 1.35	23 4.87 1.46	25 4.56 1.71	20 4.65 1.53	11 4.27 1.19	32 4.47 1.32
Designing the broad architecture of our marketing technology systems	25 4.00 1.32 bd	18 5.00 1.50 a	22 4.45 1.68	43 4.67 1.13 a	17 4.35 1.87	48 4.63 1.48	20 4.70 1.81	30 4.33 1.42 h	19 4.63 1.64	34 4.56 1.42	23 4.87 0.97	26 4.23 1.66 h	20 4.30 1.75	11 4.18 1.66	32 5.06 1.44 ae
Generating ROI from marketing technologies	24 4.25 1.65	18 5.06 1.63	23 4.43 1.73	42 4.95 1.32 eg	17 3.94 2.14 d	48 4.54 1.53	20 4.15 1.57 d	29 4.62 1.70	20 4.60 1.70	33 4.52 1.66	23 4.52 1.44	26 4.62 1.92	20 4.55 1.64	11 4.36 1.75	32 4.41 1.41
Developing capabilities for using marketing technologies	24 4.42 1.79	18 5.17 1.20 ce	23 4.30 1.33 b	41 4.80 1.36 e	17 3.82 1.91 bd	47 4.45 1.50	20 4.35 1.53	29 4.62 1.70	20 4.60 1.50	34 4.85 1.33	21 4.29 1.55	26 4.31 1.72	19 4.16 1.50	11 4.09 1.81	32 4.59 1.39
Demonstrating ROI from marketing technologies	24 4.29 1.81	18 4.89 1.32	23 4.13 1.58	43 4.74 1.40	17 3.94 2.08	48 4.27 1.50	20 4.05 1.70	29 4.52 1.70	20 4.40 1.70	34 4.44 1.48	23 4.26 1.51	26 4.62 1.88	20 4.40 1.64	11 3.64 1.63	32 4.22 1.43

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

 **Topic 2: Marketing Technology and AI**

Rate how well your company is performing each of the following marketing technology activities: (1=Poorly - 7=Very Well)

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
Integrating marketing technologies across other data systems in our company	25 3.28 1.17 BDf	18 5.06 1.51 Acef	23 3.87 1.52 b	43 4.35 1.25 A	17 3.71 1.79 b	48 4.00 1.56 ab	20 4.00 1.86	30 3.37 1.22 bCdh	20 4.40 1.82 a	34 4.32 1.47 A	23 4.13 1.36 a	26 3.92 1.55	20 3.95 1.64	11 4.09 2.12	32 4.22 1.54 a
Training current employees on emerging marketing technologies	24 3.42 1.77 b	18 4.50 1.54 a	22 3.91 1.74	43 4.16 1.49	17 3.47 1.97	48 3.98 1.62	20 3.90 1.29	29 3.59 1.74	19 4.16 1.74	34 4.12 1.68	23 3.91 1.56	26 3.92 1.62	20 3.50 1.70	11 3.91 1.87	32 4.25 1.37
Hiring to manage marketing technologies	23 3.22 1.78	18 3.72 1.60	23 3.09 1.53 f	43 3.91 1.85	17 3.88 2.34	48 3.88 1.48 c	20 3.70 1.22	28 3.36 1.79	20 3.40 1.70	34 3.44 1.62	23 4.22 1.95	26 3.58 1.92	20 3.70 1.78	11 3.73 1.42	32 4.06 1.29

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

 **Topic 2: Marketing Technology and AI**

Check all the statements that describe your company’s digital activities:

N=185

	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
Marketing leaders have a good understanding of the technology roadmap and capabilities they can use to do great marketing	123 66.5%	49 70.0% c	36 70.6% c	20 47.6% abd	18 81.8% c	50 70.4%	33 63.5%	22 61.1%	10 66.7%	5 83.3%	52 66.7%	70 66.0%
We continuously test and iterate in using digital marketing	112 60.5%	36 51.4% c	32 62.7%	31 73.8% a	13 59.1%	39 54.9%	30 57.7%	24 66.7%	11 73.3%	5 83.3%	45 57.7%	66 62.3%
Marketing leaders are more collaborative with the CIO/CTO (or the equivalent technology leaders)	103 55.7%	42 60.0%	28 54.9%	20 47.6%	13 59.1%	45 63.4%	26 50.0%	21 58.3%	7 46.7%	2 33.3%	40 51.3%	62 58.5%
Marketing teams have the skills and training to best use your company's marketing systems powered by technology systems/tools	92 49.7%	37 52.9% c	28 54.9% c	14 33.3% ab	13 59.1%	47 66.2% BC	21 40.4% A	13 36.1% A	7 46.7%	2 33.3%	37 47.4%	55 51.9%

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



Topic 2: Marketing Technology and AI

Check all the statements that describe your company’s digital activities:

N=185

	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
Marketing has the right systems in place to track customer engagement in a way that informs its marketing roadmap	80 43.2%	30 42.9%	24 47.1%	13 31.0%	13 59.1% d c	35 49.3%	20 38.5%	15 41.7%	5 33.3%	2 33.3%	34 43.6%	46 43.4%
Your company has consolidated customer intelligence in a way that integrates customer data across all touchpoints	56 30.3%	14 20.0% D	16 31.4% d	13 31.0% d	13 59.1% Abc	20 28.2% d	10 19.2% D	12 33.3%	9 60.0% aB	2 33.3%	27 34.6%	28 26.4%

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



Topic 2: Marketing Technology and AI

Check all the statements that describe your company's digital activities:

N=185

	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 leaders have a good understanding of the technology roadmap and capabilities they can use to do great marketing	16 69.6% C	7 70.0% c	4 23.5% AbdeFghikl Mn	4 100.0% c	4 80.0% c	6 100.0% C	12 60.0% c	6 75.0% c	10 71.4% c	1 50.0%	8 61.5% c	4 80.0% c	28 71.8% C	6 85.7% c	7 58.3%
We continuously test and iterate in using digital marketing	16 69.6%	5 50.0%	12 70.6%	3 75.0%	3 60.0%	3 50.0%	11 55.0%	5 62.5%	7 50.0%	2 100.0%	7 53.8%	3 60.0%	24 61.5%	6 85.7%	5 41.7%
Marketing leaders are more collaborative with the CIO/CTO (or the equivalent technology leaders)	15 65.2%	4 40.0%	6 35.3% m	2 50.0%	3 60.0%	4 66.7%	9 45.0%	5 62.5%	6 42.9%	1 50.0%	5 38.5%	4 80.0%	26 66.7% c	5 71.4%	8 66.7%
Marketing teams have the skills and training to best use your company's marketing systems powered by technology systems/tools	9 39.1% g	6 60.0%	5 29.4% fgm	0 0.0% fglm	2 40.0%	5 83.3% cd	14 70.0% acd	4 50.0%	5 35.7%	0 0.0%	6 46.2%	4 80.0% d	24 61.5% cd	4 57.1%	4 33.3%

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



Topic 2: Marketing Technology and AI

Check all the statements that describe your company's digital activities:

N=185

	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
Marketing has the right systems in place to track customer engagement in a way that informs its marketing roadmap	7 30.4%	4 40.0%	5 29.4%	1 25.0%	4 80.0%	1 16.7%	11 55.0%	4 50.0%	5 35.7%	1 50.0%	5 38.5%	2 40.0%	21 53.8%	3 42.9%	6 50.0%
Your company has consolidated customer intelligence in a way that integrates customer data across all touchpoints	3 13.0%	3 30.0%	2 11.8%	3 75.0%	1 20.0%	1 16.7%	10 50.0%	3 37.5%	2 14.3%	1 50.0%	7 53.8%	2 40.0%	12 30.8%	3 42.9%	3 25.0%

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



Topic 2: Marketing Technology and AI

Check all the statements that describe your company's digital activities:

N=185

	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
Marketing leaders have a good understanding of the technology roadmap and capabilities they can use to do great marketing	16 61.5%	11 68.8%	14 60.9%	31 73.8%	7 50.0%	30 71.4%	12 60.0%	17 58.6%	15 71.4%	21 67.7%	16 76.2%	14 58.3%	15 78.9%	4 50.0%	21 65.6%
Marketing leaders are more collaborative with the CIO/CTO (or the equivalent technology leaders)	13 50.0% b	14 87.5% aCfG	9 39.1% B	26 61.9%	8 57.1%	23 54.8% b	8 40.0% B	16 55.2%	13 61.9%	18 58.1%	16 76.2% eh	10 41.7% d	10 52.6%	6 75.0%	14 43.8% d
We continuously test and iterate in using digital marketing	13 50.0%	9 56.3%	15 65.2%	25 59.5%	9 64.3%	28 66.7%	12 60.0%	16 55.2%	12 57.1%	17 54.8%	13 61.9%	16 66.7%	10 52.6%	6 75.0%	22 68.8%
Marketing teams have the skills and training to best use your company's marketing systems powered by technology systems/tools	11 42.3%	10 62.5%	10 43.5%	21 50.0%	5 35.7%	23 54.8%	10 50.0%	13 44.8%	11 52.4%	13 41.9%	11 52.4%	11 45.8%	13 68.4%	4 50.0%	16 50.0%

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



Topic 2: Marketing Technology and AI

Check all the statements that describe your company’s digital activities:

N=185

	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
Your company has consolidated customer intelligence in a way that integrates customer data across all touchpoints	8 30.8%	5 31.3%	8 34.8%	14 33.3%	3 21.4%	7 16.7%	10 50.0%	9 31.0%	8 38.1%	8 25.8%	7 33.3%	4 16.7%	4 21.1%	1 12.5%	15 46.9%
Marketing has the right systems in place to track customer engagement in a way that informs its marketing roadmap	5 19.2% BcdE	11 68.8% AF	12 52.2% a	21 50.0% af	9 64.3% Af	12 28.6% Bde	8 40.0%	7 24.1% bCd	12 57.1% a	20 64.5% Afh	11 52.4% a	9 37.5%	6 31.6% c	3 37.5%	12 37.5% c

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

 **Topic 2: Marketing Technology and AI**

What percent of your digital marketing activities are performed by external agencies, partners, and services:

Number Mean SE	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
Currently	198	80	52	45	21	74	58	37	18	6	81	116
	33.59	28.38	25.19	47.89	43.57	25.54	37.93	40.41	43.89	34.17	33.09	33.79
	2.07	2.99	3.86	4.52	5.60	3.11	3.70	5.15	7.56	12.14	3.23	2.73
		Cd	Cd	AB	ab	bcd	a	a	a			
2 years from Now	193	78	49	45	21	71	58	37	18	6	77	115
	34.27	30.83	25.90	44.11	45.48	29.72	37.40	35.14	39.72	31.67	33.23	34.83
	1.89	2.65	3.45	4.15	6.19	2.85	3.53	4.69	6.16	13.52	3.02	2.44
		Cd	CD	AB	aB							

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

 **Topic 2: Marketing Technology and AI**

What percent of your digital marketing activities are performed by external agencies, partners, and services:

Number Mean SE	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
Currently	25 31.60 5.08 bceoa	11 10.45 4.07 CDfGhiJlm NO	18 54.72 7.71 aBEgIkM	4 47.50 15.88 BeaCd	5 3.00 2.00 GijlmnO	6 37.50 14.24 b	20 33.00 5.15 BcEo	8 34.38 11.70 b	20 28.50 5.76 bCeO	3 51.67 22.42 Be	14 27.86 9.22 co	5 34.00 13.27 be	41 27.56 3.81 bCeO	6 49.17 13.00 Be	12 57.08 8.67 aBEgIkM
2 years from Now	25 31.40 4.71 ceO	11 18.64 6.61 CgO	18 51.11 7.08 aBEM	4 31.25 10.48 eaCd	5 2.00 2.00 FGHjIM nO	6 39.17 9.35 E	20 42.50 5.37 bEM	8 35.63 10.06 e	19 34.21 5.53 Eo	3 43.33 20.48 e	11 32.64 9.50	5 35.00 13.78 e	40 23.63 2.70 CEGnO	6 40.00 11.03 em	12 58.33 8.33 ABEiM

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

 **Topic 2: Marketing Technology and AI**

What percent of your digital marketing activities are performed by external agencies, partners, and services:

Number Mean SE	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
Currently	26 28.46 7.04 f	18 24.72 6.68 f	24 25.83 4.92 F	45 29.44 4.08 f	17 38.82 8.28	46 43.59 4.08 abCd	20 40.00 5.45	30 31.00 6.32	22 24.09 4.40 gH	36 26.11 4.88 H	23 34.13 6.42	26 37.88 5.20	19 31.32 7.33	10 45.00 8.69 b	32 44.84 4.43 BC
2 years from Now	26 35.96 4.74	17 23.53 4.92 f	21 27.38 5.62	45 33.33 3.98	17 36.47 7.64	46 38.78 4.04 b	19 38.16 5.83	30 39.17 4.55 bc	22 25.00 4.04 aH	33 24.70 3.94 aeH	23 36.30 5.76	25 39.00 5.94 c	19 31.58 7.23	10 37.90 10.05	31 41.45 4.25 BC

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

 **Topic 2: Marketing Technology and AI**

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

	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	2 1.0%	2 2.5%	0 0.0%	0 0.0%	0 0.0%	1 1.3%	1 1.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 1.7%
2	8 4.0%	4 5.0%	1 1.9%	3 6.5%	0 0.0%	4 5.3%	2 3.4%	2 5.4%	0 0.0%	0 0.0%	3 3.6%	5 4.2%
3	16 7.9%	9 11.3%	5 9.4%	2 4.3%	0 0.0%	4 5.3% b	10 16.9% a	2 5.4%	0 0.0%	0 0.0%	8 9.6%	8 6.8%
4	28 13.9%	13 16.3%	6 11.3%	3 6.5%	5 22.7%	15 19.7% c	9 15.3%	2 5.4% a	1 5.6%	0 0.0%	14 16.9%	14 11.9%
5	55 27.2%	20 25.0%	17 32.1%	15 32.6%	3 13.6%	15 19.7% b	23 39.0% a	11 29.7%	3 16.7%	0 0.0%	30 36.1% b	25 21.2% a
6	61 30.2%	27 33.8%	18 34.0%	12 26.1%	4 18.2%	28 36.8% b	11 18.6% a	12 32.4%	7 38.9%	2 33.3%	21 25.3%	39 33.1%
7=Very Highly	32 15.8%	5 6.3% CD	6 11.3% D	11 23.9% A	10 45.5% AB	9 11.8% DE	3 5.1% cDE	8 21.6% be	7 38.9% AB	4 66.7% ABc	7 8.4% b	25 21.2% a
Mean	5.16	4.83 cD	5.21 d	5.39 a	5.86 Ab	5.09 DE	4.63 CDE	5.43 Be	6.11 AB	6.67 ABc	4.95	5.31

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



Topic 2: Marketing Technology and AI

To what degree has the use of digital marketing contributed to your company's performance during 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
1=Not at all	0 0.0% f	0 0.0%	1 5.6%	0 0.0%	0 0.0%	1 16.7% am	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0% f	0 0.0%	0 0.0%
2	1 4.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 4.8%	1 10.0% m	3 15.0% m	0 0.0%	1 7.7%	0 0.0%	0 0.0% hin	1 14.3% m	0 0.0%
3	2 8.0%	0 0.0%	0 0.0% jk	0 0.0%	0 0.0%	0 0.0%	3 14.3%	0 0.0%	4 20.0%	1 33.3% c	3 23.1% c	0 0.0%	3 7.3%	0 0.0%	0 0.0%
4	7 28.0% mo	1 9.1%	3 16.7%	1 25.0%	0 0.0%	0 0.0%	2 9.5%	3 30.0%	3 15.0%	0 0.0%	1 7.7%	1 20.0%	3 7.3% a	2 28.6%	0 0.0% a
5	4 16.0% b	6 54.5% a	6 33.3%	0 0.0%	2 40.0%	1 16.7%	6 28.6%	3 30.0%	6 30.0%	0 0.0%	4 30.8%	1 20.0%	10 24.4%	3 42.9%	3 25.0%
6	6 24.0% M	2 18.2% m	4 22.2% m	2 50.0%	1 20.0%	3 50.0%	5 23.8% m	3 30.0%	3 15.0% M	1 33.3%	2 15.4% M	1 20.0%	24 58.5% AbcgIKN	0 0.0% M	4 33.3%
7=Very Highly	5 20.0% m	2 18.2%	4 22.2% m	1 25.0% m	2 40.0% iM	1 16.7%	4 19.0% m	0 0.0% o	1 5.0% elo	1 33.3% m	2 15.4%	2 40.0% iM	1 2.4% acdEgjLO	1 14.3%	5 41.7% hiM
Mean	5.08 o	5.45 i	5.28 i	5.75	6.00 i	5.17	5.10 o	4.70 O	4.25 bcelMO	5.33	4.69 O	5.80 i	5.41 lo	4.57 O	6.17 agHIKMN

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



Topic 2: Marketing Technology and AI

To what degree has the use of digital marketing contributed to your company's performance during 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
1=Not at all	0 0.0%	0 0.0%	1 4.2%	0 0.0%	0 0.0%	1 2.1%	0 0.0%	0 0.0%	0 0.0%	1 2.8%	0 0.0%	0 0.0%	1 5.0%	0 0.0%	0 0.0%
2	2 7.7%	0 0.0%	0 0.0%	2 4.4%	2 11.8%	2 4.2%	0 0.0%	1 3.3%	1 4.5%	1 2.8%	1 4.2%	2 7.7%	0 0.0%	2 18.2%	0 0.0%
3	3 11.5%	2 11.1%	1 4.2%	3 6.7%	2 11.8%	1 2.1%	4 19.0%	3 10.0%	1 4.5%	3 8.3%	1 4.2%	2 7.7%	2 10.0%	0 0.0%	4 12.1%
4	3 11.5%	1 5.6%	2 8.3%	5 11.1%	5 29.4%	7 14.6%	3 14.3%	2 6.7%	3 13.6%	7 19.4%	4 16.7%	1 3.8%	5 25.0%	2 18.2%	4 12.1%
5	7 26.9%	4 22.2%	7 29.2%	10 22.2%	3 17.6%	17 35.4%	7 33.3%	7 23.3%	5 22.7%	9 25.0%	5 20.8%	6 23.1%	6 30.0%	4 36.4%	13 39.4%
6	5 19.2%	10 55.6%	9 37.5%	19 42.2%	3 17.6%	12 25.0%	2 9.5%	11 36.7%	10 45.5%	10 27.8%	11 45.8%	10 38.5%	1 5.0%	2 18.2%	6 18.2%
7=Very Highly	6 23.1%	1 5.6%	4 16.7%	6 13.3%	2 11.8%	8 16.7%	5 23.8%	6 20.0%	2 9.1%	5 13.9%	2 8.3%	5 19.2%	5 25.0%	1 9.1%	6 18.2%
Mean	5.08	5.39	5.38	5.31	4.53	5.19	5.05	5.40	5.27	5.00	5.25	5.35	4.90	4.64	5.18

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

 **Topic 2: Marketing Technology and AI**

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	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
Current	191	74	53	44	20	70	57	36	17	6	79	111
	24.17	22.66	29.06	22.84	19.75	24.86	22.46	25.06	28.82	17.50	24.87	23.44
	20.69	21.35	22.64	19.03	14.46	19.89	22.32	20.84	22.81	15.41	22.47	19.36
Next three years	188	74	51	43	20	70	57	34	17	6	78	109
	55.91	53.51	57.84	57.53	56.40	56.86	54.53	54.71	64.94	51.67	55.94	55.59
	25.15	27.77	22.77	24.99	21.94	24.24	28.01	23.09	24.72	23.17	25.73	24.75

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

 **Topic 2: Marketing Technology and AI**

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	24 22.71 16.48 im	11 29.09 17.15 lj	18 18.89 22.59 M	4 32.50 20.62 i	5 22.00 32.90	5 13.00 15.65 m	20 19.25 17.94 M	8 20.00 14.14 m	17 11.12 13.42 aBdklMo	3 6.00 3.61 bm	14 26.07 26.25 i	5 29.00 22.47 i	40 36.13 21.62 aCfGhIj	6 18.33 12.11	11 26.36 20.38 i
Next three Years	24 58.96 21.31 hI	11 56.82 27.14 i	17 48.82 28.86 m	4 65.00 20.82 i	5 48.00 25.88	5 48.00 20.80	20 55.00 24.01 im	8 40.00 19.82 aMo	17 36.76 22.15 AbdgmO	3 63.33 34.03	13 56.77 28.16 i	5 58.00 29.50	39 68.44 24.38 cgHI	6 51.67 13.29	11 60.00 20.49 hI

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

 **Topic 2: Marketing Technology and AI**

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	27 21.85 20.85	18 34.17 25.04 Ce	23 15.87 13.45 Bd	40 28.75 23.00 ce	17 15.82 15.46 bd	43 24.49 18.24	21 25.00 23.87	31 23.23 18.78	22 30.45 28.24	35 19.57 16.29	21 25.81 23.57	23 22.09 19.03	17 19.82 16.39	9 29.44 18.62	33 26.97 22.53
Next three Years	27 48.33 21.84	17 62.94 27.16	22 49.68 26.67	40 58.35 28.12	17 57.94 29.74	43 58.84 23.09	20 52.25 17.20	31 51.77 19.98	21 58.71 32.32	34 51.74 25.67	21 60.71 28.03	23 58.26 29.30	17 54.12 25.33	9 65.56 17.22	32 55.94 21.00

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188	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
Content creation	73.9%	78.9%	73.6%	69.0%	66.7%	76.1%	75.0%	67.6%	70.6%	80.0%	73.4%	74.1%
Content personalization	65.4%	67.6%	67.9%	61.9%	57.1%	67.6%	62.5%	61.8%	58.8%	80.0%	69.6%	62.0%
Improving marketing ROI by optimizing marketing content and timing	49.5%	50.7%	52.8%	42.9%	52.4%	56.3%	42.9%	38.2%	58.8%	80.0%	49.4%	49.1%
Marketing automation: AI-powered automation tools streamline marketing processes	48.9%	49.3%	50.9%	42.9%	57.1%	53.5% ce	50.0% e	32.4% aE	47.1% e	100.0% abCd	45.6%	50.9%
Data analysis and reporting: To measure performance, track metrics, and generate reports	46.3%	43.7%	54.7%	40.5%	47.6%	49.3%	44.6%	47.1%	35.3%	40.0%	46.8%	45.4%
Targeting decisions	45.2%	35.2% D	47.2%	47.6%	71.4% A	39.4%	48.2%	47.1%	52.9%	60.0%	44.3%	45.4%
GEO (i.e., Generative Engine Optimization to get content to appear in AI-generated search results)	41.5%	40.8%	47.2%	38.1%	38.1%	43.7%	41.1%	26.5% e	47.1%	80.0% c	43.0%	39.8%
Predictive analytics for customer insights	41.5%	36.6% d	37.7%	45.2%	61.9% a	33.8%	44.6%	47.1%	52.9%	40.0%	45.6%	38.0%
Conversational AI for customer service (i.e., chatbots, virtual assistants)	39.9%	33.8%	37.7%	50.0%	42.9%	32.4% E	41.1% e	44.1% e	52.9%	100.0% Abc	40.5%	38.9%

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188

	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
Customer segmentation	35.6%	35.2%	35.8%	31.0%	47.6%	36.6%	37.5%	29.4%	35.3%	40.0%	39.2%	32.4%
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	32.4%	25.4% D	24.5% D	42.9%	57.1% AB	23.9%	37.5%	38.2%	35.3%	60.0%	32.9%	32.4%
Listening and sentiment analysis	28.2%	19.7% c	26.4%	40.5% a	38.1%	19.7% De	25.0% d	35.3%	52.9% Ab	60.0% a	21.5%	32.4%
Next best offer	12.8%	8.5% c	3.8% CD	26.2% aB	23.8% B	5.6% dE	16.1%	14.7%	23.5% a	40.0% A	15.2%	11.1%
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	9.6%	8.5%	11.3%	9.5%	9.5%	12.7% c	10.7%	0.0% ade	11.8% c	20.0% c	16.5% B	4.6% A
Augmented and virtual reality	6.4%	4.2%	1.9% c	14.3% b	9.5%	5.6%	5.4%	8.8%	11.8%	0.0%	7.6%	5.6%
Voice search optimization	4.3%	1.4%	5.7%	4.8%	9.5%	2.8%	5.4%	2.9%	5.9%	20.0%	1.3%	6.5%
Facial recognition and visual search: Image and video recognition	3.7%	0.0% bD	5.7% a	2.4%	14.3% A	2.8%	3.6%	0.0% de	11.8% c	20.0% c	3.8%	3.7%
Biometrics also known as chipping (i.e., body or hand implants)	1.1%	0.0%	0.0%	2.4%	4.8%	0.0% D	0.0% d	0.0% d	11.8% Abc	0.0%	0.0%	1.9%

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188

	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
Content creation	80.0%	54.5%	64.7%	50.0%	75.0%	60.0%	71.4%	85.7%	75.0%	66.7%	76.9%	60.0%	80.0%	66.7%	90.0%
Marketing automation: AI- powered automation tools streamline marketing processes	76.0% Cljn	45.5%	23.5% AhLm	50.0%	25.0% l	40.0%	47.6% il	71.4% ci	12.5% AghkLMo	0.0% al	53.8% i	100.0% Cegljn	57.5% cl	16.7% al	60.0% i
GEO (i.e., Generative Engine Optimization to get content to appear in AI-generated search results)	64.0% bCgIN	18.2% am	17.6% AdM	75.0% cin	50.0%	40.0%	33.3% a	42.9%	12.5% AdIM	33.3%	46.2%	60.0% i	60.0% bCIN	0.0% AdM	40.0%
Content personalization	56.0% m	63.6%	52.9% mn	50.0%	75.0%	80.0%	61.9%	42.9% mn	56.3% m	0.0% kMn	69.2% j	80.0%	82.5% achiJ	100.0% chj	60.0%
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	52.0% i	18.2%	41.2%	50.0%	25.0%	20.0%	23.8%	28.6%	12.5% alo	0.0%	23.1%	60.0% i	35.0%	16.7%	50.0% i
Targeting decisions	52.0%	72.7% cjmn	29.4% b	75.0%	50.0%	20.0%	42.9%	57.1%	37.5%	0.0% b	53.8%	80.0%	37.5% b	16.7% b	70.0%
Improving marketing ROI by optimizing marketing content and timing	48.0%	45.5%	35.3% dm	100.0% cgik	50.0%	40.0%	38.1% dm	71.4% i	25.0% dhlM	33.3%	38.5% dm	80.0% i	72.5% cgIk	33.3%	40.0%
Predictive analytics for customer insights	44.0%	45.5%	29.4% n	75.0% f	25.0%	0.0% dhmn	47.6%	71.4% fi	25.0% hn	0.0% n	30.8% n	20.0%	47.5% f	83.3% cfijk	50.0%

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188

	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
Conversational AI for customer service (i.e., chatbots, virtual assistants)	40.0%	45.5%	35.3%	75.0% g	50.0%	40.0%	19.0% dm	42.9%	25.0%	66.7%	23.1%	60.0%	50.0% g	50.0%	40.0%
Data analysis and reporting: To measure performance, track metrics, and generate reports	40.0%	63.6%	35.3%	50.0%	50.0%	60.0%	57.1%	71.4% i	25.0% h	0.0%	53.8%	60.0%	45.0%	66.7%	40.0%
Customer segmentation	28.0% bl	72.7% acgljm	29.4% b	50.0%	25.0%	40.0%	33.3% b	57.1%	18.8% Bl	0.0% b	30.8%	80.0% ai	35.0% b	50.0%	30.0%
Listening and sentiment analysis	28.0%	18.2%	35.3%	50.0%	25.0%	40.0%	23.8%	0.0% k	25.0%	33.3%	46.2% h	40.0%	25.0%	33.3%	30.0%
Next best offer	24.0%	18.2%	5.9%	25.0%	0.0%	0.0%	4.8% l	14.3%	18.8%	0.0%	15.4%	40.0% gm	7.5% l	33.3%	0.0%
Biometrics also known as chipping (i.e., body or hand implants)	4.0%	0.0%	0.0% d	25.0% cgM	0.0%	0.0%	0.0% d	0.0%	0.0%	0.0%	0.0%	0.0%	0.0% D	0.0%	0.0%
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	4.0%	9.1%	5.9%	0.0%	25.0%	0.0%	9.5%	14.3%	12.5%	0.0%	7.7%	20.0%	15.0%	0.0%	10.0%
Voice search optimization	4.0%	0.0%	11.8%	25.0% m	0.0%	0.0%	4.8%	0.0%	6.3%	0.0%	0.0%	20.0%	2.5% d	0.0%	0.0%
Facial recognition and visual search: Image and video recognition	4.0% l	9.1%	0.0% dl	25.0% cM	0.0%	0.0%	4.8% l	0.0%	0.0% l	0.0%	7.7%	40.0% acgiM	0.0% DL	0.0%	0.0%
Augmented and virtual reality	0.0% dfHNo	0.0%	5.9%	25.0% aM	0.0%	20.0% aM	4.8%	28.6% AM	6.3%	0.0%	7.7%	0.0%	0.0% DFHNO	33.3% AM	20.0% aM

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188

	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
Content creation	69.2%	70.6%	81.8%	85.0%	86.7%	60.5%	68.2%	76.7%	76.2%	78.8%	90.9%	68.2%	64.7%	33.3%	73.5%
				f		d		g	g	g	G			abcDh	g
Content personalization	57.7%	64.7%	68.2%	67.5%	46.7%	60.5%	86.4%	56.7%	71.4%	66.7%	68.2%	54.5%	64.7%	66.7%	73.5%
	g				g	g	aef								
Targeting decisions	53.8%	41.2%	22.7%	42.5%	40.0%	48.8%	63.6%	50.0%	38.1%	39.4%	36.4%	36.4%	52.9%	44.4%	58.8%
	c		afG			c	C								
Marketing automation: AI-powered automation tools streamline marketing processes	50.0%	52.9%	40.9%	37.5%	60.0%	58.1%	50.0%	53.3%	47.6%	48.5%	27.3%	50.0%	64.7%	44.4%	52.9%
											f		d		
Improving marketing ROI by optimizing marketing content and timing	38.5%	64.7%	45.5%	65.0%	46.7%	44.2%	45.5%	46.7%	61.9%	51.5%	54.5%	27.3%	52.9%	44.4%	52.9%
	d			a					e			b			
Customer segmentation	38.5%	35.3%	13.6%	45.0%	40.0%	37.2%	31.8%	36.7%	33.3%	33.3%	45.5%	27.3%	29.4%	33.3%	41.2%
			d	c											
Predictive analytics for customer insights	38.5%	35.3%	18.2%	40.0%	46.7%	53.5%	54.5%	36.7%	47.6%	30.3%	22.7%	36.4%	47.1%	66.7%	58.8%
			Fg			C	c			h	gh			d	cd
Data analysis and reporting: To measure performance, track metrics, and generate reports	38.5%	41.2%	27.3%	50.0%	53.3%	55.8%	54.5%	43.3%	38.1%	33.3%	36.4%	50.0%	70.6%	66.7%	52.9%
			f			c				f	f		cd		
GEO (i.e., Generative Engine Optimization to get content to appear in AI-generated search results)	26.9%	47.1%	31.8%	52.5%	46.7%	44.2%	40.9%	33.3%	47.6%	33.3%	68.2%	40.9%	29.4%	55.6%	38.2%
	d			a				d		d	acfh		d		d

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



Topic 2: Marketing Technology and AI

How is your company using AI in its marketing activities? (check all that apply)

N=188

	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
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	19.2% f	23.5%	31.8%	27.5% f	40.0%	48.8% ad	27.3%	16.7% cfg	28.6%	45.5% ad	18.2% cg	27.3%	47.1% a	55.6% ad	35.3%
Conversational AI for customer service (i.e., chatbots, virtual assistants)	15.4% bFg	47.1% a	40.9%	35.0%	33.3%	53.5% A	50.0% a	30.0%	33.3%	42.4%	31.8%	40.9%	47.1%	44.4%	50.0%
Listening and sentiment analysis	11.5% eg	17.6%	22.7%	30.0%	40.0% a	32.6%	40.9% a	20.0%	19.0%	24.2%	22.7%	31.8%	47.1%	44.4%	32.4%
Augmented and virtual reality	7.7%	0.0%	4.5%	5.0%	13.3%	4.7%	13.6%	6.7%	4.8%	3.0%	4.5%	4.5%	11.8%	0.0%	11.8%
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	7.7%	17.6%	4.5%	5.0%	20.0%	7.0%	18.2%	6.7%	9.5%	6.1%	9.1%	4.5%	17.6%	11.1%	14.7%
Facial recognition and visual search: Image and video recognition	3.8%	0.0%	4.5%	0.0%	0.0%	7.0%	9.1%	3.3%	4.8%	0.0%	4.5%	0.0%	5.9%	0.0%	8.8%
Voice search optimization	3.8%	5.9%	4.5%	2.5%	13.3%	2.3%	4.5%	6.7%	9.5%	6.1%	0.0%	0.0%	0.0%	0.0%	5.9%
Next best offer	3.8% e	0.0% efg	13.6%	5.0% efg	26.7% abd	20.9% bd	22.7% bd	3.3% Gh	9.5% g	9.1% g	0.0% fGh	9.1% g	17.6% d	44.4% AbcDe	26.5% ad
Biometrics also known as chipping (i.e., body or hand implants)	0.0%	0.0%	4.5%	0.0%	0.0%	2.3%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%

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



Topic 2: Marketing Technology and AI

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 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	187	73	50	43	21	69	56	34	17	6	77	109
Mean	22.42	21.52	27.44	18.95	20.71	24.74	19.07	20.88	30.59	16.67	21.40	22.89
SD	19.53	19.87	22.90	16.98	11.86	20.65	15.84	19.52	26.03	14.72	18.52	20.19
			c	b			d		b			

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



Topic 2: Marketing Technology and AI

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

	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	25	11	18	3	5	5	20	7	17	3	13	5	40	5	10
Mean	19.36	27.27	14.89	38.33	26.00	16.00	19.75	22.14	11.29	8.67	23.08	26.00	33.95	17.00	17.50
SD	13.44	33.19	17.56	16.07	29.45	17.10	13.23	16.80	16.46	7.09	18.20	23.29	20.77	11.51	11.12
	dM		dM	acgijo			dM		dM	dm			ACGIjo		dm

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

 **Topic 2: Marketing Technology and AI**

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
N	26	18	23	41	15	41	21	30	22	35	22	21	18	8	31
Mean	24.62	32.50	15.22	23.83	15.00	21.80	22.71	24.83	30.23	16.86	24.23	20.52	17.33	23.13	23.61
SD	22.49	26.47	10.92	20.19	13.20	18.55	18.57	20.11	25.33	14.61	22.57	21.32	16.62	17.92	16.85
		Ce	B		b				c	b					

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



Topic 2: Marketing Technology and AI

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

	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
Implementing security measures to protect customer information	4.99	4.71	5.17	4.64	6.06	5.00	4.87	5.15	4.07	6.75	4.73	5.18
		d		d	ac				e	d		
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	4.53	4.46	4.89	4.38	4.16	4.64	4.40	4.81	3.71	4.75	4.33	4.68
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	4.37	4.42	4.64	4.09	4.11	4.56	4.09	4.63	3.79	4.75	4.24	4.46
Understanding how content or decisions are being made	4.37	4.02	4.59	4.41	4.79	4.41	3.96	4.81	4.21	4.25	4.06	4.57
							c	b				
Reducing susceptibility to attacks by malicious actors	4.30	4.21	4.48	3.71	5.29	4.27	4.23	4.40	3.64	4.75	4.42	4.22
				d	c							
Minimizing bias and ensuring fairness	3.83	3.60	3.91	3.85	4.32	3.88	3.65	3.93	3.57	4.25	3.67	3.96
Investing in hiring and building expertise necessary to use generative AI	3.65	3.52	4.02	3.18	4.00	4.14	3.11	3.36	3.29	4.50	3.76	3.57
						B	A					
Investing in hardware necessary for generative AI to work well	3.51	3.36	3.89	2.88	4.18	3.88	2.98	3.60	2.77	4.25	3.56	3.46
			c	bd	c	b	a					

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

Topic 2: Marketing Technology and AI

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

	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
Implementing security measures to protect customer information	6.17	4.00	3.62	5.33	6.00	3.00	5.25	5.33	4.44	3.00	5.09	6.50	4.84	5.25	5.00
	BCFiJKM	AI	AI			A			a	A	a	bc	A		
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	4.36	5.00	3.64	5.33	5.75	5.00	4.44	4.50	3.40	2.33	4.73	5.75	5.14	3.25	4.50
			M		gjn		ej		M	egLM		jn	CIJn	elm	
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	4.00	5.29	3.36	5.00	5.00	5.33	4.22	4.17	3.40	2.33	4.64	5.50	5.05	3.25	4.38
	m	cjn	bM				jm		M	bgM			aCgIJn	bm	
Understanding how content or decisions are being made	4.74	4.43	4.00	5.00	5.25	4.67	4.61	5.00	2.80	3.00	4.36	6.00	4.37	4.25	3.75
	i	l	l		i		i	ij	aeghLm	hl		bcIjo	i		L
Reducing susceptibility to attacks by malicious actors	5.00	2.86	3.07	5.67	6.00	2.33	4.19	5.00	4.00	2.67	4.82	5.25	4.49	4.00	3.88
	BCfj	Adehkl	Aekm	b	bcf	aeK		b		a	bcf	b	c		
Minimizing bias and ensuring fairness	4.65	3.14	3.07	4.00	4.25	3.00	4.22	4.50	2.60	1.67	3.91	5.50	3.95	3.25	3.25
	cIj	l	al				ij	iJ	Aghl	agHkLm	j	bcIjn	j	l	
Investing in hiring and building expertise necessary to use generative AI	3.81	2.71	2.50	4.33	2.50	3.67	3.50	4.67	2.70	2.67	4.50	5.25	4.27	3.25	2.88
	c	hkLm	ahkLM				l	bc	klm		bcI	bcgio	bCio		Lm
Investing in hardware necessary for generative AI to work well	4.36	2.14	1.93	4.67	3.50	2.33	4.06	3.83	2.30	1.00	3.64	5.75	3.84	4.50	2.88
	BCI	AdgLmn	ADGhKLM N	bCi	l	l	bCi	c	AdgLmn		c	BCeflO	bCi	bCio	Ln

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



Topic 2: Marketing Technology and AI

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

	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	5,000-9,999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Implementing security measures to protect customer information	4.05	4.67	4.53	4.97	5.23	5.90	5.06	4.04	4.58	5.39	4.81	4.94	5.54	6.60	5.32
	F	f	F	f		AbCd		cfgh		a			a	a	a
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	4.24	4.80	4.20	4.61	3.92	4.88	4.68	4.22	4.44	4.64	4.35	4.69	4.14	5.80	4.76
													g	f	
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	4.24	4.80	3.70	4.56	3.69	4.81	4.26	4.15	4.06	4.54	4.39	4.38	4.07	5.80	4.52
			f		f	ce							G	F	
Understanding how content or decisions are being made	4.14	4.80	4.40	4.14	3.85	4.72	4.32	4.33	4.63	4.79	3.94	3.81	4.00	4.40	4.55
Reducing susceptibility to attacks by malicious actors	3.19	3.87	3.95	4.24	4.31	5.31	4.67	3.04	3.95	4.61	4.06	4.20	4.77	6.60	5.00
	Fg	F	F	f		ABCd	a	CeFGH	g	Ag	g	ag	Ag	Abcdef	A
Minimizing bias and ensuring fairness	3.05	4.40	3.45	3.80	3.77	4.28	4.00	3.04	4.37	4.14	3.72	3.44	3.43	5.20	4.17
	bf	a				a		bcgh	a	a				a	a
Investing in hiring and building expertise necessary to use generative AI	3.20	3.93	2.85	4.00	3.15	4.17	3.61	3.08	3.74	3.36	4.06	4.00	3.23	5.00	3.93
			df	c		c		g					g	af	
Investing in hardware necessary for generative AI to work well	2.67	3.73	2.70	3.68	3.00	4.10	4.22	2.81	3.26	3.48	3.76	3.13	3.46	4.60	4.21
	Fg		Fg			AC	ac	gH						a	A

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



Topic 2: Marketing Technology and AI

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:

	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
Sales productivity	14.06	13.66	17.21	11.97	11.67	17.42	11.11	11.47	15.00	14.00	12.69	15.02
Marketing overhead costs	14.64	14.13	19.52 C	10.74 B	12.29	17.26 c	13.60	10.63 a	16.00	13.00	13.19	15.33
Customer satisfaction	10.75	9.31 b	15.45 ac	7.69 b	10.77	12.64	8.91 d	6.61 D	18.00 bC	8.00	9.28	11.53

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

 **Topic 2: Marketing Technology and AI**

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:

	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
Sales productivity	10.91 bdilm	23.89 afgI	12.29	27.50 aFln	11.40	4.00 bD	8.85 b	20.83 i	5.31 aBDhLM	0.00	15.00	30.00 aI	20.00 aI	7.50 d	10.50
Marketing overhead costs	13.78	18.89 cio	7.69 bDkM	30.00 CeIO	4.00 dm	8.00	13.27	15.00	7.63 bDkM	5.00	19.55 cio	18.75	22.22 CeIO	15.00	6.50 bDkM
Customer satisfaction	10.45 cd	17.22 Cio	2.25 aBDkLmN	25.00 aCfglO	6.00	5.00 dn	7.00 d	8.33	5.19 bDkLmn	0.00	18.67 ci	20.00 Clo	15.57 ci	17.50 CfIO	4.44 bDIN
Significance Tests Between Columns:	Lower case: p<.05		Upper case: p<.01												



Topic 2: Marketing Technology and AI

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:

	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
Sales productivity	20.43 E	20.39 E	13.94 e	12.78	5.47 ABc	11.91	13.21	18.82 e	18.10 e	13.17	11.88	8.16 ab	11.67	8.00	15.36
Marketing overhead costs	19.77	17.50	12.82	14.50	10.67	12.71	12.53	18.33	15.25	13.06	18.44	11.47	13.33	10.00	13.52
Customer satisfaction	11.95	18.24	7.94	11.29	6.33	9.94	8.15	10.56	19.74 c	8.17 b	11.56	8.61	10.00	5.00	9.73
Significance Tests Between Columns:	Lower case: p<.05		Upper case: p<.01												

 **Topic 3: Managing Growth**

Rank order the following factors in terms of their importance for driving future organic revenue growth within your company? (1 = most important, 5 = least important)

Number Mean SD	Ranking factors											
	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
Having all stakeholders aligned												
	206	82	55	48	21	78	57	39	18	8	80	125
	2.89	3.06	2.98	2.56	2.76	3.06	2.65	3.00	2.33	3.25	2.99	2.84
	1.43	1.38	1.33	1.58	1.51	1.50	1.33	1.38	1.57	1.49	1.40	1.46
Having the right talent												
	206	82	55	48	21	78	57	39	18	8	80	125
	2.47	2.29	2.75	2.44	2.52	2.42	2.21	2.67	2.78	3.13	2.60	2.38
	1.37	1.37	1.51	1.15	1.44	1.35	1.29	1.44	1.35	1.55	1.42	1.34
Having the right data												
	206	82	55	48	21	78	57	39	18	8	80	125
	3.08	3.17	2.85	3.33	2.71	3.10	3.39	2.92	2.83	2.50	3.11	3.07
	1.30	1.33	1.41	1.06	1.35	1.26	1.31	1.42	1.15	1.41	1.39	1.25
Having the right operating model												
	206	82	55	48	21	78	57	39	18	8	80	125
	2.88	3.04	2.65	2.79	3.05	2.83	2.95	2.64	3.11	3.00	2.80	2.93
	1.34	1.35	1.32	1.35	1.32	1.32	1.25	1.35	1.53	1.31	1.35	1.34
Having the right technology												
	206	82	55	48	21	78	57	39	18	8	80	125
	3.68	3.44	3.76	3.88	3.95	3.58	3.81	3.77	3.94	3.13	3.50	3.78
	1.36	1.42	1.28	1.41	1.12	1.41	1.38	1.27	1.06	1.64	1.39	1.33

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

Topic 3: Managing Growth

Rank order the following factors in terms of their importance for driving future organic revenue growth within your company? (1 = most important, 5 = least 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
Having all stakeholders aligned															
	29	11	19	5	5	6	21	10	19	1	14	4	42	7	13
	2.45	2.91	2.84	2.20	2.40	2.00	3.24	2.60	3.21	2.00	2.71	3.75	3.19	3.57	2.69
	1.33	1.64	1.54	0.84	1.14	1.10	1.48	1.26	1.36	---	1.27	0.96	1.55	1.90	1.38
	m			1		1						df	a		
Having the right talent															
	29	11	19	5	5	6	21	10	19	1	14	4	42	7	13
	2.48	3.27	2.32	3.20	3.00	2.83	2.48	3.00	2.32	1.00	2.50	2.25	2.19	3.00	1.92
	1.43	1.49	1.29	1.48	0.71	1.60	1.33	1.56	1.60	---	1.40	1.89	1.19	1.00	1.32
		mo											b		b
Having the right data															
	29	11	19	5	5	6	21	10	19	1	14	4	42	7	13
	2.79	2.45	3.58	2.80	2.20	3.67	2.76	3.60	3.00	4.00	3.21	3.25	3.07	2.86	3.77
	1.37	1.04	0.96	1.64	1.64	1.03	1.34	0.70	1.15	---	1.48	1.26	1.39	1.77	1.17
	co	CfHO	aBeg		cho	b	co	Be							aBeg
Having the right operating model															
	29	11	19	5	5	6	21	10	19	1	14	4	42	7	13
	3.38	3.00	2.32	3.40	3.20	2.67	2.95	2.00	3.21	5.00	2.29	2.00	3.00	2.57	2.85
	1.27	1.41	1.00	1.82	1.79	1.37	1.47	1.33	1.55	---	1.27	1.41	1.13	1.51	1.14
	CHk		Aim					Aim	ch		a		ch		
Having the right technology															
	29	11	19	5	5	6	21	10	19	1	14	4	42	7	13
	3.90	3.36	3.95	3.40	4.20	3.83	3.57	3.80	3.26	3.00	4.29	3.75	3.55	3.00	3.77
	1.21	1.57	1.51	1.52	1.30	1.60	1.36	1.55	1.33	---	0.83	1.26	1.48	1.00	1.36
									k		iN			K	

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

 **Topic 3: Managing Growth**

Rank order the following factors in terms of their importance for driving future organic revenue growth within your company? (1 = most important, 5 = least 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
Having all stakeholders aligned															
	31	19	23	43	15	49	25	34	21	37	21	24	19	13	37
	3.23	2.89	2.74	2.86	3.20	2.84	2.56	2.97	2.86	2.70	3.33	3.21	2.63	2.62	2.81
	1.65	1.45	1.39	1.44	0.94	1.45	1.45	1.66	1.35	1.45	1.32	1.28	1.30	1.50	1.47
Having the right talent															
	31	19	23	43	15	49	25	34	21	37	21	24	19	13	37
	2.68	2.26	2.17	2.42	1.87	2.59	2.92	2.47	2.43	2.32	2.10	2.63	2.53	2.69	2.65
	1.30	1.48	0.98	1.45	1.41	1.40	1.38	1.26	1.47	1.42	1.26	1.50	1.61	1.18	1.34
			g		g		ce								
Having the right data															
	31	19	23	43	15	49	25	34	21	37	21	24	19	13	37
	3.13	2.89	3.22	3.30	3.07	3.02	2.68	3.29	3.19	3.08	3.05	3.08	2.84	3.08	2.95
	1.20	1.24	1.44	1.30	1.03	1.36	1.38	1.22	1.33	1.21	1.43	1.38	1.21	1.44	1.41
Having the right operating model															
	31	19	23	43	15	49	25	34	21	37	21	24	19	13	37
	2.39	3.05	3.26	2.93	3.07	2.73	3.08	2.62	2.62	3.19	3.19	2.83	3.00	2.77	2.78
	1.33	1.08	1.54	1.26	1.53	1.34	1.32	1.30	1.36	1.24	1.44	1.34	1.41	1.36	1.38
	c		a												
Having the right technology															
	31	19	23	43	15	49	25	34	21	37	21	24	19	13	37
	3.58	3.89	3.61	3.49	3.80	3.82	3.76	3.65	3.90	3.70	3.33	3.25	4.00	3.85	3.81
	1.34	1.45	1.34	1.44	1.52	1.25	1.36	1.35	1.22	1.43	1.39	1.59	1.15	1.46	1.24

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



Topic 3: Managing Growth

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

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
Existing products/ services in existing markets	217 56.44 24.31	84 54.88 25.94	56 49.64 22.07	52 61.00 22.84	25 67.40 21.90	79 52.72 25.30	63 58.73 23.57	43 60.28 24.18	18 53.89 23.04	9 55.00 20.00	84 53.57 24.87	132 58.08 23.88
		d	CD	B	aB							
New products/services in existing markets	217 22.89 18.40	84 23.37 18.87	56 28.13 18.96	52 20.02 17.08	25 15.52 15.20	79 25.44 20.11	63 21.37 15.71	43 21.56 17.25	18 20.44 15.98	9 23.44 22.12	84 23.57 18.55	132 22.48 18.42
			cD	b	B							
Existing products/ services in new markets	217 14.14 14.31	84 14.01 14.70	56 15.71 12.84	52 13.37 15.07	25 12.64 15.04	79 13.92 12.47	63 13.49 11.97	43 13.37 15.26	18 18.11 21.31	9 17.44 20.71	84 14.95 14.01	132 13.73 14.53
New products/services in new markets	217 6.53 9.00	84 7.74 10.56	56 6.52 7.56	52 5.62 7.62	25 4.44 8.80	79 7.91 9.92	63 6.41 7.43	43 4.79 8.98	18 7.56 11.50	9 4.11 5.88	84 7.90 8.79	132 5.71 9.08

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

 **Topic 3: Managing Growth**

Allocate 100 points to reflect your company's spending in each of the four growth strategies during 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
Existing products/ services in existing markets	29 60.17 25.34	12 57.08 25.18	22 62.73 20.22 i	5 49.00 20.12	5 75.00 18.03 i	6 54.17 24.17	22 54.55 24.88	8 49.38 27.96	20 48.00 23.14 ce	3 73.33 5.77	15 59.00 16.50	6 54.17 22.89	43 51.40 27.85	8 60.63 25.97	13 62.46 25.72
New products/services in existing markets	29 16.38 14.01 hm	12 21.67 20.15	22 21.77 18.75	5 23.00 19.24	5 21.20 19.61	6 24.17 21.54	22 25.55 19.72	8 30.00 22.04 a	20 23.25 18.73	3 5.00 5.00	15 23.33 16.00	6 25.83 21.54	43 27.67 20.19 a	8 23.50 14.62	13 17.08 16.64
Existing products/ services in new markets	29 16.21 14.12	12 16.67 16.14	22 12.50 14.86	5 23.00 19.24	5 3.40 5.27 j	6 14.17 17.44	22 11.36 11.15	8 13.75 13.02	20 17.75 18.46	3 20.00 10.00 e	15 13.33 12.63	6 12.50 8.80	43 13.37 13.17	8 8.88 10.15	13 16.15 20.12
New products/services in new markets	29 7.24 8.08 c	12 4.58 5.42	22 3.00 3.95 agim	5 5.00 11.18	5 0.40 0.89	6 7.50 11.73	22 8.55 9.07 c	8 6.88 9.98	20 11.00 15.36 c	3 1.67 2.89	15 4.33 5.30	6 7.50 9.87	43 7.56 9.28 c	8 7.00 7.87	13 4.31 7.55

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


Topic 3: Managing Growth
Allocate 100 points to reflect your company's spending in each of the four growth strategies during 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
Existing products/ services in existing markets	31 54.68 24.56	19 59.47 25.54	24 59.38 22.81	47 51.21 23.80	17 58.24 24.23	52 57.88 24.58	25 58.40 25.93	35 55.00 24.61	23 57.61 17.38	40 59.38 25.95	23 56.30 21.91	25 51.00 29.79	20 59.10 24.44	14 53.93 23.63	37 57.16 24.85
New products/services in existing markets	31 23.55 21.69	19 23.16 19.38	24 22.29 22.12	47 22.85 17.22	17 22.65 16.78	52 22.90 17.56	25 22.88 16.91	35 23.43 20.36	23 23.04 17.76	40 23.50 20.79	23 17.70 16.16	25 21.44 17.73	20 24.10 16.70	14 25.00 17.21	37 24.38 18.19
Existing products/ services in new markets	31 15.65 15.59	19 12.63 11.59	24 13.96 16.48	47 18.40 18.03	17 10.88 10.64	52 12.06 10.44	25 12.44 13.36	35 15.29 14.14	23 14.57 12.61	40 11.63 15.21	23 18.70 17.53	25 17.48 17.36	20 11.50 10.77	14 13.21 12.80	37 12.19 12.08
New products/services in new markets	31 6.13 7.50	19 4.74 7.35	24 4.38 8.64	47 7.53 10.47	17 8.24 12.74	52 7.15 8.74	25 6.28 7.19	35 6.29 7.98	23 4.78 5.53	40 5.50 9.18	23 7.30 8.14	25 10.08 14.81	20 5.30 6.74	14 7.86 11.22	37 6.27 6.76

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



Topic 3: Managing Growth

When pursuing growth opportunities, how often do the following behaviors occur in your 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
Effectively leveraging technology to pursue growth opportunities												
majority of time	56.5%	56.6%	60.3%	48.0%	65.2%	64.6%	50.0%	47.6%	61.1%	55.6%	53.6%	58.9%
minority of time	43.5%	43.4%	39.7%	52.0%	34.8%	35.4%	50.0%	52.4%	38.9%	44.4%	46.4%	41.1%
Using an integrated marketing team in which marketing and finance experts work together												
majority of time	49.5%	50.6%	37.3% d	55.8%	62.5% b	54.3%	49.2%	46.5%	50.0%	33.3%	44.7%	52.3%
minority of time	50.5%	49.4%	62.7% d	44.2%	37.5% b	45.7%	50.8%	53.5%	50.0%	66.7%	55.3%	47.7%
Marketing offers a strong interpretation of customer insights important to the growth opportunity												
majority of time	70.6%	65.5%	70.7%	78.8%	70.8%	75.3%	71.0%	67.4%	66.7%	66.7%	69.4%	71.2%
minority of time	29.4%	34.5%	29.3%	21.2%	29.2%	24.7%	29.0%	32.6%	33.3%	33.3%	30.6%	28.8%
Marketing is able to connect the growth strategy to relevant customer metrics												
majority of time	71.4%	68.7%	76.3%	69.2%	73.9%	63.0% d	72.1%	79.1%	88.9% a	77.8%	70.6%	71.8%
minority of time	28.6%	31.3%	23.7%	30.8%	26.1%	37.0% d	27.9%	20.9%	11.1% a	22.2%	29.4%	28.2%
Marketing builds a business case for the growth strategy												
Majority of time	67.6%	58.5% C	63.8% c	82.7% Ab	75.0%	65.4%	67.2%	73.8%	66.7%	66.7%	53.6% B	76.3% A
Minority of time	32.4%	41.5% C	36.2% c	17.3% Ab	25.0%	34.6%	32.8%	26.2%	33.3%	33.3%	46.4% B	23.7% A

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

Topic 3: Managing Growth

When pursuing growth opportunities, how often do the following behaviors occur in your 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
Effectively leveraging technology to pursue growth opportunities															
majority of time	69.0% bcf	33.3% am	36.8% aM	75.0%	80.0%	16.7% aM	61.9%	44.4%	52.6%	33.3%	62.5%	33.3%	72.7% bCFo	62.5%	38.5% m
minority of time	31.0% bcf	66.7% am	63.2% aM	25.0%	20.0%	83.3% aM	38.1%	55.6%	47.4%	66.7%	37.5%	66.7%	27.3% bCFo	37.5%	61.5% m
Using an integrated marketing team in which marketing and finance experts work together															
majority of time	51.7%	75.0% j	47.6%	40.0%	20.0%	66.7%	50.0%	33.3%	42.1%	0.0% b	37.5%	50.0%	59.1%	62.5%	38.5%
minority of time	48.3%	25.0% j	52.4%	60.0%	80.0%	33.3%	50.0%	66.7%	57.9%	100.0% b	62.5%	50.0%	40.9%	37.5%	61.5%
Marketing offers a strong interpretation of customer insights important to the growth opportunity															
majority of time	48.3% bcdgl	83.3% a	81.0% a	100.0% a	40.0%	83.3%	81.8% a	87.5%	70.0%	66.7%	75.0%	100.0% a	61.4%	75.0%	69.2%
minority of time	51.7% bcdgl	16.7% a	19.0% a	0.0% a	60.0%	16.7%	18.2% a	12.5%	30.0%	33.3%	25.0%	0.0% a	38.6%	25.0%	30.8%
Marketing is able to connect the growth strategy to relevant customer metrics															
majority of time	67.9%	75.0%	66.7%	100.0%	60.0%	66.7%	86.4% k	77.8%	84.2% k	66.7%	50.0% gi	83.3%	68.2%	75.0%	61.5%
minority of time	32.1%	25.0%	33.3%	0.0%	40.0%	33.3%	13.6% k	22.2%	15.8% k	33.3%	50.0% gi	16.7%	31.8%	25.0%	38.5%
Marketing builds a business case for the growth strategy															
Majority of time	51.7% cgo	66.7%	85.7% am	75.0%	60.0%	50.0%	86.4% am	77.8%	61.1%	66.7%	68.8%	66.7%	56.8% cg	75.0%	84.6% a
Minority of time	48.3% cgo	33.3%	14.3% am	25.0%	40.0%	50.0%	13.6% am	22.2%	38.9%	33.3%	31.3%	33.3%	43.2% cg	25.0%	15.4% a

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



Topic 3: Managing Growth

When pursuing growth opportunities, how often do the following behaviors occur in your 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
Effectively leveraging technology to pursue growth opportunities															
majority of time	59.4%	63.2%	47.8%	61.7%	56.3%	53.1%	50.0%	58.3%	40.9% c	69.2% b	47.8%	61.5%	42.1%	57.1%	60.0%
minority of time	40.6%	36.8%	52.2%	38.3%	43.8%	46.9%	50.0%	41.7%	59.1% c	30.8% b	52.2%	38.5%	57.9%	42.9%	40.0%
Using an integrated marketing team in which marketing and finance experts work together															
majority of time	40.6%	57.9%	33.3%	57.4%	47.1%	53.8%	52.0%	30.6% cdfG	56.5%	53.8% a	60.9% ae	29.6% dfG	63.2% ae	78.6% AE	48.6%
minority of time	59.4%	42.1%	66.7%	42.6%	52.9%	46.2%	48.0%	69.4% cdfG	43.5%	46.2% a	39.1% ae	70.4% dfG	36.8% ae	21.4% AE	51.4%
Marketing offers a strong interpretation of customer insights important to the growth opportunity															
majority of time	81.3%	78.9%	58.3%	63.8%	76.5%	67.3%	80.0%	77.8%	73.9%	59.0% g	69.6%	59.3% g	63.2%	92.9% ce	78.4%
minority of time	18.8%	21.1%	41.7%	36.2%	23.5%	32.7%	20.0%	22.2%	26.1%	41.0% g	30.4%	40.7% g	36.8%	7.1% ce	21.6%
Marketing is able to connect the growth strategy to relevant customer metrics															
majority of time	68.8%	63.2%	65.2%	80.9%	64.7%	66.7%	84.6%	66.7%	69.6%	65.8%	87.0% e	51.9% dh	77.8%	78.6%	81.6% e
minority of time	31.3%	36.8%	34.8%	19.1%	35.3%	33.3%	15.4%	33.3%	30.4%	34.2%	13.0% e	48.1% dh	22.2%	21.4%	18.4% e
Marketing builds a business case for the growth strategy															
Majority of time	84.4% def	78.9%	65.2%	63.8% a	52.9% a	62.7% a	68.0%	83.3% Dfh	69.6%	71.1% d	43.5% Acg	70.4%	57.9% a	78.6% d	61.1% a
Minority of time	15.6% def	21.1%	34.8%	36.2% a	47.1% a	37.3% a	32.0%	16.7% Dfh	30.4%	28.9% d	56.5% Acg	29.6%	42.1% a	21.4% d	38.9% a

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



Topic 3: Managing Growth

What percentage of your company's sales is domestic?

	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	217	83	57	52	25	79	62	43	18	9	86	130
Mean	81.60	75.14	82.42	85.44	93.24	81.65	79.98	79.27	90.72	85.21	75.47	85.52
SD	20.35	20.85	20.92	18.67	12.72	19.11	22.03	21.76	13.01	24.27	20.89	19.05
		BCD	ad	A	Ab			d	c		B	A

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

 **Topic 3: Managing Growth**

What percentage of your company's sales is domestic?

	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	28	11	22	5	5	6	22	9	20	3	15	6	44	8	13
Mean	90.71	87.36	85.95	79.00	73.38	73.65	81.04	60.44	84.45	99.00	90.67	88.33	70.86	65.86	97.31
SD	16.65	19.74	16.40	24.60	28.01	22.54	24.91	12.43	15.75	1.73	13.87	19.41	19.32	22.54	5.99
	fHMN	Hmn	HMno	o	O	akO	ho	ABCgIJKL O	HMnO	Hmn	fHMN	Hm	AbCljKlO	AbcijKO	cdEFgHIM N

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



Topic 3: Managing Growth

What percentage of your company's sales is domestic?

	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	31	19	24	47	17	52	26	35	23	39	22	26	20	14	38
Mean	89.22	81.15	87.24	83.27	77.11	79.15	71.76	90.05	85.43	85.25	78.45	79.00	85.69	81.07	69.41
SD	15.09	18.49	19.37	18.70	23.52	21.39	23.11	14.38	16.30	18.17	19.96	22.24	22.08	20.49	22.57
	efG		g	g	a	a	Ac	deH	H	H	a	a	h		ABCf

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



Topic 3: Managing Growth

What percent of your marketing budget do you spend on domestic markets?

	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	216	84	55	52	25	79	62	43	18	9	84	131
Mean	83.88	77.10	86.35	87.59	93.49	83.94	82.04	84.11	89.57	78.72	78.99	86.89
SD	21.90	22.59	22.02	20.31	16.19	21.60	22.51	22.13	19.13	29.94	22.19	21.26
		BCD	a	A	A						B	A

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

 **Topic 3: Managing Growth**

What percent of your marketing budget do you spend on domestic markets?

	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	29	11	22	5	5	6	22	8	20	3	14	6	44	8	13
Mean	88.15	90.84	88.93	65.85	74.85	77.50	81.47	69.38	83.97	100.00	97.43	88.33	75.40	77.28	98.46
SD	21.98	19.69	20.01	28.36	27.21	25.64	25.47	20.95	20.76	0.00	5.77	19.41	21.39	27.57	3.76
	hm	hm	dhm	cKO	KO	kO	ko	abcKO	ko		DEfgHiMn		abcKO	ko	DEFgHiMn

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

 **Topic 3: Managing Growth**

What percent of your marketing budget do you spend on domestic markets?

	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	31	19	24	47	17	52	24	35	23	40	22	26	20	14	36
Mean	92.53	85.18	89.44	85.66	79.71	79.48	75.81	93.04	89.06	85.81	80.06	80.33	86.96	82.73	73.13
SD	17.19	21.89	19.97	18.20	22.04	24.50	25.78	16.37	20.56	19.29	21.52	23.82	20.52	24.22	25.02
	efG		g		a	a	Ac	deH	h	h	a	a	h		Abcf

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

 **Topic 3: Managing Growth**

Which international market that you are currently not in is your biggest opportunity for the future?

N=118	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
Western Europe	26 22.0%	8 14.0% b	12 37.5% a	4 18.2%	2 28.6%	14 30.4% b	3 8.8% aE	5 18.5%	2 28.6%	2 66.7% B	9 16.7%	17 26.6%
China	13 11.0%	9 15.8%	1 3.1%	2 9.1%	1 14.3%	6 13.0%	6 17.6% c	0 0.0% b	1 14.3%	0 0.0%	8 14.8%	5 7.8%
Africa (non-Middle East and South Africa)	10 8.5%	4 7.0%	2 6.3%	4 18.2%	0 0.0%	3 6.5%	2 5.9%	3 11.1%	2 28.6%	0 0.0%	5 9.3%	5 7.8%
Eastern Europe	9 7.6%	5 8.8%	1 3.1% d	1 4.5%	2 28.6% b	3 6.5%	2 5.9%	2 7.4%	1 14.3%	0 0.0%	5 9.3%	4 6.3%
Australia/New Zealand	8 6.8%	2 3.5%	3 9.4%	3 13.6%	0 0.0%	3 6.5%	3 8.8%	2 7.4%	0 0.0%	0 0.0%	2 3.7%	6 9.4%
Canada	8 6.8%	2 3.5% c	2 6.3%	4 18.2% a	0 0.0%	2 4.3%	3 8.8%	3 11.1%	0 0.0%	0 0.0%	1 1.9%	7 10.9%
Middle East	8 6.8%	7 12.3%	1 3.1%	0 0.0%	0 0.0%	4 8.7%	2 5.9%	2 7.4%	0 0.0%	0 0.0%	6 11.1%	2 3.1%
South American countries besides Brazil	8 6.8%	3 5.3%	4 12.5%	1 4.5%	0 0.0%	0 0.0% bcE	4 11.8% a	3 11.1% a	0 0.0%	1 33.3% A	3 5.6%	5 7.8%

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



Topic 3: Managing Growth

Which international market that you are currently not in is your biggest opportunity for the future?

N=118	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
Japan	6 5.1%	3 5.3%	3 9.4%	0 0.0%	0 0.0%	4 8.7%	1 2.9%	1 3.7%	0 0.0%	0 0.0%	2 3.7%	4 6.3%
Brazil	6 5.1%	4 7.0%	0 0.0%	1 4.5%	1 14.3%	3 6.5%	2 5.9%	1 3.7%	0 0.0%	0 0.0%	1 1.9%	5 7.8%
Mexico	4 3.4%	2 3.5%	0 0.0%	2 9.1%	0 0.0%	0 0.0%	4 11.8%	0 0.0%	0 0.0%	0 0.0%	2 3.7%	2 3.1%
Central America	4 3.4%	1 1.8%	3 9.4%	0 0.0%	0 0.0%	2 4.3%	0 0.0%	2 7.4%	0 0.0%	0 0.0%	3 5.6%	1 1.6%
India	3 2.5%	3 5.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 2.9%	2 7.4%	0 0.0%	0 0.0%	3 5.6%	0 0.0%
Indonesia and Southeast Asia	2 1.7%	2 3.5%	0 0.0%	0 0.0%	0 0.0%	1 2.2%	1 2.9%	0 0.0%	0 0.0%	0 0.0%	2 3.7%	0 0.0%
Russia	1 0.8%	1 1.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.7%	0 0.0%	0 0.0%	0 0.0%	1 1.6%
Korea	1 0.8%	1 1.8%	0 0.0%	0 0.0%	0 0.0%	1 2.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.9%	0 0.0%
Scandinavia	1 0.8%	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%	0 0.0%	0 0.0%	1 14.3%	0 0.0%	1 1.9%	0 0.0%

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

 **Topic 3: Managing Growth**

Which international market that you are currently not in is your biggest opportunity for the future?

N=118

	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
Western Europe	8 47.1% dFg	3 27.3%	7 50.0% dFg	4 15.4% ac	1 10.0%	2 7.4% AC	1 7.7% ac	7 36.8% dh	7 53.8% DH	6 26.1% d	0 0.0% aBc	3 20.0%	1 12.5%	1 12.5%	1 5.6% aB
Australia/New Zealand	3 17.6% d	1 9.1%	1 7.1%	0 0.0% a	1 10.0%	2 7.4%	0 0.0%	3 15.8%	0 0.0%	3 13.0%	0 0.0%	0 0.0%	0 0.0%	2 25.0% h	0 0.0% g
Eastern Europe	2 11.8%	1 9.1%	0 0.0%	1 3.8%	1 10.0%	3 11.1%	1 7.7%	1 5.3%	1 7.7%	1 4.3%	2 14.3%	1 6.7%	2 25.0%	0 0.0%	1 5.6%
Canada	1 5.9%	1 9.1%	1 7.1%	1 3.8%	2 20.0% f	0 0.0% eg	2 15.4% f	3 15.8%	0 0.0%	1 4.3%	0 0.0%	2 13.3%	0 0.0%	0 0.0%	2 11.1%
China	1 5.9%	0 0.0%	0 0.0%	6 23.1%	0 0.0%	5 18.5%	1 7.7%	2 10.5%	1 7.7%	1 4.3% d	4 28.6% ce	0 0.0% d	1 12.5%	0 0.0%	4 22.2%
South American countries besides Brazil	1 5.9%	0 0.0%	2 14.3%	2 7.7%	0 0.0%	1 3.7%	2 15.4%	1 5.3%	2 15.4%	1 4.3%	0 0.0%	2 13.3%	1 12.5%	0 0.0%	1 5.6%
Africa (non-Middle East and South Africa)	1 5.9%	0 0.0%	0 0.0% g	0 0.0% fG	0 0.0%	5 18.5% d	4 30.8% cD	1 5.3%	0 0.0% h	0 0.0% fh	0 0.0% h	1 6.7%	2 25.0% c	1 12.5%	5 27.8% bcd
India	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 10.0%	1 3.7%	1 7.7%	0 0.0%	0 0.0%	0 0.0%	1 7.1%	0 0.0%	0 0.0%	1 12.5%	1 5.6%

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



Topic 3: Managing Growth

Which international market that you are currently not in is your biggest opportunity for the future?

N=118

	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
Indonesia and Southeast Asia	0 0.0%	0 0.0%	0 0.0%	1 3.8%	0 0.0%	1 3.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 7.1%	0 0.0%	0 0.0%	0 0.0%	1 5.6%
Japan	0 0.0%	1 9.1%	0 0.0%	3 11.5%	1 10.0%	1 3.7%	0 0.0%	0 0.0%	1 7.7%	3 13.0%	1 7.1%	1 6.7%	0 0.0%	0 0.0%	0 0.0%
Korea	0 0.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Mexico	0 0.0%	0 0.0%	1 7.1%	0 0.0%	2 20.0%	1 3.7%	0 0.0%	0 0.0%	0 0.0%	1 4.3%	0 0.0%	1 6.7%	1 12.5%	1 12.5%	0 0.0%
Middle East	0 0.0%	0 0.0%	2 14.3%	3 11.5%	0 0.0%	3 11.1%	0 0.0%	0 0.0%	0 0.0%	2 8.7%	3 21.4%	1 6.7%	0 0.0%	1 12.5%	1 5.6%
Scandinavia	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 7.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 5.6%
Russia	0 0.0%	0 0.0%	0 0.0%	1 3.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 6.7%	0 0.0%	0 0.0%	0 0.0%
Central America	0 0.0%	1 9.1%	0 0.0%	2 7.7%	0 0.0%	1 3.7%	0 0.0%	0 0.0%	0 0.0%	2 8.7%	0 0.0%	2 13.3%	0 0.0%	0 0.0%	0 0.0%
Brazil	0 0.0%	2 18.2%	0 0.0%	2 7.7%	1 10.0%	1 3.7%	0 0.0%	1 5.3%	1 7.7%	1 4.3%	2 14.3%	0 0.0%	0 0.0%	1 12.5%	0 0.0%

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

 **Topic 3: Managing Growth**

Which international market that you are currently not in is your biggest opportunity for the future?

N=118

	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
Japan	2 22.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 25.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	3 8.8%	0 0.0%	0 0.0%
Western Europe	2 22.2%	2 28.6%	2 14.3% k	0 0.0%	0 0.0% k	0 0.0% k	1 12.5% k	0 0.0% k	2 15.4% k	0 0.0%	5 71.4% cefg him	1 50.0%	10 29.4% k	1 20.0%	0 0.0%
Brazil	1 11.1%	1 14.3% m	1 7.1%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 16.7% m	2 15.4% m	0 0.0%	0 0.0%	0 0.0%	0 0.0% bhi	0 0.0%	0 0.0%
Eastern Europe	1 11.1%	0 0.0%	1 7.1%	1 33.3%	0 0.0%	0 0.0%	1 12.5%	0 0.0%	2 15.4%	0 0.0%	0 0.0%	0 0.0%	3 8.8%	0 0.0%	0 0.0%
Indonesia and Southeast Asia	1 11.1%	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%	1 2.9%	0 0.0%	0 0.0%
Middle East	1 11.1%	0 0.0%	0 0.0% o	0 0.0%	1 25.0%	0 0.0%	1 12.5%	0 0.0%	0 0.0% o	0 0.0%	0 0.0%	0 0.0%	4 11.8%	0 0.0%	1 50.0% ci
Australia/New Zealand	1 11.1%	1 14.3%	2 14.3%	0 0.0%	1 25.0%	0 0.0%	0 0.0%	1 16.7%	0 0.0%	0 0.0%	1 14.3%	0 0.0%	1 2.9%	0 0.0%	0 0.0%
India	0 0.0%	0 0.0%	0 0.0% h	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 33.3% cim	0 0.0% h	0 0.0%	0 0.0%	0 0.0%	1 2.9% h	0 0.0%	0 0.0%
Central America	0 0.0%	1 14.3% m	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 16.7% m	1 7.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0% bhn	1 20.0% m	0 0.0%

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

 **Topic 3: Managing Growth**

Which international market that you are currently not in is your biggest opportunity for the future?

N=118

	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
Africa (non- Middle East and South Africa)	0 0.0% d	0 0.0% d	0 0.0% Dn	2 66.7% abCikM	0 0.0%	1 25.0%	2 25.0%	0 0.0%	1 7.7% d	0 0.0%	0 0.0% d	0 0.0%	2 5.9% Dn	2 40.0% cm	0 0.0%
Korea	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%	1 2.9%	0 0.0%	0 0.0%
Mexico	0 0.0%	0 0.0%	3 21.4% M	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 7.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0% C	0 0.0%	0 0.0%
China	0 0.0% f	1 14.3%	1 7.1%	0 0.0%	0 0.0%	2 50.0% ai	1 12.5%	1 16.7%	0 0.0% fl	0 0.0%	0 0.0%	1 50.0% I	6 17.6%	0 0.0%	0 0.0%
Scandinavia	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% n	1 20.0% m	0 0.0%
Russia	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%	1 2.9%	0 0.0%	0 0.0%
South American countries besides Brazil	0 0.0% e	1 14.3% m	1 7.1%	0 0.0%	2 50.0% aM	0 0.0%	1 12.5% m	0 0.0%	2 15.4% m	0 0.0%	1 14.3% m	0 0.0%	0 0.0% bEgik	0 0.0%	0 0.0%
Canada	0 0.0%	0 0.0%	3 21.4% m	0 0.0%	0 0.0%	0 0.0%	1 12.5%	0 0.0%	2 15.4%	0 0.0%	0 0.0%	0 0.0%	1 2.9% cO	0 0.0%	1 50.0% M

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

 **Topic 4: Marketing Capabilities**

How important is developing agility to the success of your marketing organization? (select the best description)

N=308	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
Agility is key to our success	125 71.0%	46 69.7%	39 78.0%	27 67.5%	12 63.2%	48 72.7%	36 66.7%	25 78.1%	8 57.1%	4 66.7%	52 71.2%	73 70.9%
Agility is moderately important to our success	44 25.0%	16 24.2%	10 20.0%	12 30.0%	6 31.6%	16 24.2%	15 27.8%	6 18.8%	5 35.7%	2 33.3%	16 21.9%	28 27.2%
Agility is not very important to our success	7 4.0%	4 6.1%	1 2.0%	1 2.5%	1 5.3%	2 3.0%	3 5.6%	1 3.1%	1 7.1%	0 0.0%	5 6.8%	2 1.9%

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

 **Topic 4: Marketing Capabilities**

How important is developing agility to the success of your marketing organization? (select the best description)

N=308

	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
Agility is key to our success	14 60.9% m	7 77.8%	12 75.0%	3 75.0%	5 100.0% i	2 50.0%	14 66.7%	4 57.1%	7 43.8% ekM	2 66.7%	11 84.6% i	4 80.0%	30 88.2% alo	3 75.0%	6 54.5% m
Agility is moderately important to our success	9 39.1% M	2 22.2%	3 18.8%	1 25.0%	0 0.0%	2 50.0% m	6 28.6%	2 28.6%	8 50.0% kM	1 33.3%	1 7.7% i	1 20.0%	3 8.8% Aflo	1 25.0%	4 36.4% m
Agility is not very important to our success	0 0.0%	0 0.0%	1 6.3%	0 0.0%	0 0.0%	0 0.0%	1 4.8%	1 14.3%	1 6.3%	0 0.0%	1 7.7%	0 0.0%	1 2.9%	0 0.0%	1 9.1%

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

 **Topic 4: Marketing Capabilities**

How important is developing agility to the success of your marketing organization? (select the best description)

N=308

	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
Agility is key to our success	13 54.2% C	11 64.7% c	19 95.0% Abdf	25 67.6% c	13 76.5%	28 71.8% c	14 73.7%	16 59.3%	14 70.0%	26 78.8%	15 75.0%	15 68.2%	10 58.8%	5 83.3%	24 77.4%
Agility is moderately important to our success	10 41.7% C	4 23.5%	1 5.0% Ad	10 27.0% c	3 17.6%	10 25.6%	5 26.3%	10 37.0%	4 20.0%	6 18.2%	3 15.0%	7 31.8%	6 35.3%	1 16.7%	7 22.6%
Agility is not very important to our success	1 4.2%	2 11.8%	0 0.0%	2 5.4%	1 5.9%	1 2.6%	0 0.0%	1 3.7%	2 10.0%	1 3.0%	2 10.0%	0 0.0%	1 5.9%	0 0.0%	0 0.0%

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

 **Topic 4: Marketing Capabilities**

These questions examine the current level of agility in your marketing organization. How well does your marketing organization do the following: (1=Not at all - 7=Very Well)

	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
Revise marketing priorities in response to change	5.49	5.36	5.85	5.24	5.50	5.73	5.10	5.50	5.62	5.50	5.42	5.54
		b	ac	b		b	a					
Shift marketing resources in response to change	5.19	5.25	5.06	5.00	6.33	5.12	4.94	5.00	6.00	6.50	5.13	5.26
Sense emerging challenges with current marketing actions	4.96	4.91	5.00	4.74	5.50	5.07	4.61	5.07	5.00	5.83	5.09	4.88
Sense emerging opportunities and threats in the marketplace	4.89	4.76	4.89	4.95	5.17	5.10	4.37	5.03	5.23	5.33	4.89	4.89
						B	Ac	b	b			
Build capabilities that facilitate agile marketing actions	4.81	4.59	5.23	4.47	5.11	5.02	4.31	4.93	4.77	5.67	4.73	4.86
		b	ac	b		B	Ac			b		

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



Topic 4: Marketing Capabilities

These questions examine the current level of agility in your marketing organization. How well does your marketing organization do the following: (1=Not at all - 7=Very Well)

	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
Revise marketing priorities in response to change	5.82	5.38	4.60	5.75	6.20	5.75	5.32	5.67	5.14	4.67	5.55	5.80	5.72	5.75	5.50
	c		am										c		
Shift marketing resources in response to change	5.14	5.67	5.00	6.00	---	5.67	4.56	5.00	5.00	---	5.00	5.75	5.57	5.00	---
Sense emerging challenges with current marketing actions	5.09	5.00	3.87	6.00	5.60	5.75	5.28	5.17	4.57	4.33	4.64	6.20	4.97	5.00	5.00
	c		aefGLm		c	c	C		l			Cim	cl		
Sense emerging opportunities and threats in the marketplace	4.59	5.00	4.40	5.50	4.60	5.50	5.11	5.00	4.50	4.00	5.64	5.80	4.97	4.50	4.80
	k										a				
Build capabilities that facilitate agile marketing actions	5.00	4.88	3.67	6.00	5.40	5.50	5.17	4.83	4.14	3.67	4.36	6.00	5.03	5.50	4.50
	c		adeGLM	ciJo	cJ	J	Ci		dglm	DEFImn		cijo	Cij	j	dl

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



Topic 4: Marketing Capabilities

These questions examine the current level of agility in your marketing organization. How well does your marketing organization do the following: (1=Not at all - 7=Very Well)

	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	5,000-9,999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
Revise marketing priorities in response to change	5.32	5.93	5.50	5.76	5.06	5.47	5.22	5.60	5.61	5.42	5.53	5.50	5.50	5.00	5.43
Shift marketing resources in response to change	5.00	5.00	6.50	5.67	5.00	5.20	4.85	4.00	---	5.63	4.00	5.80	5.88	4.00	4.86
Sense emerging challenges with current marketing actions	4.86	4.80	4.95	5.21	4.44	5.00	5.28	4.80	5.28	4.53	5.40	4.82	4.88	4.20	5.40
Sense emerging opportunities and threats in the marketplace	5.05	4.87	4.90	5.21	4.31	4.69	5.17	5.12	5.17	4.63	5.00	4.36	4.69	5.20	5.17
Build capabilities that facilitate agile marketing actions	4.71	5.20	4.85	4.73	4.06	4.86	5.11	5.04	4.94	4.67	4.73	4.50	4.56	4.40	5.13
		e			bg		e								

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

 **Topic 4: Marketing Capabilities**

How does your company approach the development of new marketing capabilities? Allocate 100 points to indicate the emphasis you place on each approach.

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
We build new marketing capabilities ourselves by training current or hiring new employees with the skills.	162 59.52 29.55	63 61.11 31.42	45 64.40 28.06	37 53.51 27.91	17 53.82 29.08	61 63.57 27.83	51 53.04 29.95	28 62.14 30.98	13 59.23 35.46	6 63.33 26.39	70 63.79 27.62	92 56.28 30.68
We partner with other marketing agencies to learn new marketing skills.	162 15.48 19.37	63 16.41 20.39	45 9.53 11.37	37 18.11 21.36	17 22.06 24.82	61 14.57 17.52	51 18.12 22.28	28 13.57 19.38	13 16.92 20.67	6 11.67 14.72	70 15.14 19.19	92 15.74 19.60
		b	acD	b	B							
We partner with other companies to learn new marketing skills.	162 12.66 15.80	63 11.87 16.11	45 12.40 16.72	37 13.38 13.90	17 14.71 17.18	61 12.18 16.93	51 12.12 12.02	28 13.93 18.43	13 10.38 16.39	6 16.67 18.35	70 9.57 11.41	92 15.01 18.16
											b	a
We partner with other consultancies to learn new marketing skills.	162 10.39 15.25	63 8.70 13.35	45 12.89 19.26	37 10.81 15.07	17 9.12 9.39	61 9.02 11.90	51 13.20 18.44	28 8.75 16.76	13 10.38 15.61	6 7.50 11.73	70 10.36 15.04	92 10.41 15.49
We buy other companies to acquire new marketing skills.	162 1.94 6.24	63 1.90 5.71	45 0.78 2.60	37 4.19 10.04	17 0.29 1.21	61 0.66 2.66	51 3.53 9.34	28 1.61 5.10	13 3.08 6.30	6 0.83 2.04	70 1.14 3.42	92 2.55 7.69
			c	b		bd	a		a			

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Topic 4: Marketing Capabilities

How does your company approach the development of new marketing capabilities? Allocate 100 points to indicate the emphasis you place on each approach.

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
We build new marketing capabilities ourselves by training current or hiring new employees with the skills.	22 57.18 23.78	8 57.50 36.55	15 49.00 31.75	3 73.33 25.17	5 83.00 22.25	4 62.50 15.00	18 66.39 27.64	7 63.57 21.74	15 58.67 37.58	3 25.00 13.23	12 70.00 31.62	5 67.00 24.39	32 64.06 27.31	2 55.00 7.07	11 34.09 31.05
	ejo		e	j	acJO	j	jO	jo	adEfgghklm	jo	j	jO			aEGhkM
We partner with other marketing agencies to learn new marketing skills.	22 13.36 11.81	8 12.50 14.88	15 29.00 28.36	3 13.33 15.28	5 0.00 0.00	4 23.75 20.56	18 10.00 12.49	7 13.57 12.49	15 17.60 20.72	3 23.33 25.17	12 6.25 8.29	5 14.00 16.73	32 11.88 14.18	2 22.50 10.61	11 33.18 36.90
	co		agkM			k	co				cfno		CO	k	agkM
We partner with other companies to learn new marketing skills.	22 15.36 18.02	8 13.75 14.08	15 10.00 10.69	3 8.33 7.64	5 16.00 23.02	4 7.50 9.57	18 13.61 12.58	7 10.71 17.90	15 13.20 21.13	3 23.33 11.55	12 7.08 11.77	5 9.00 2.24	32 11.41 17.75	2 10.00 0.00	11 19.55 18.77
										l		j			
We partner with other consultancies to learn new marketing skills.	22 12.50 19.01	8 12.50 19.09	15 7.33 8.42	3 5.00 5.00	5 0.00 0.00	4 6.25 12.50	18 8.06 8.07	7 10.71 7.87	15 8.53 14.32	3 28.33 40.72	12 16.67 29.34	5 8.00 8.37	32 9.84 9.46	2 12.50 3.54	11 13.18 17.07
							j			gm			j		
We buy other companies to acquire new marketing skills.	22 1.59 6.43	8 3.75 7.44	15 4.67 12.88	3 0.00 0.00	5 1.00 2.24	4 0.00 0.00	18 1.94 5.98	7 1.43 3.78	15 2.00 6.49	3 0.00 0.00	12 0.00 0.00	5 2.00 4.47	32 2.81 5.67	2 0.00 0.00	11 0.00 0.00

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 **Topic 4: Marketing Capabilities**

How does your company approach the development of new marketing capabilities? Allocate 100 points to indicate the emphasis you place on each approach.

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
We build new marketing capabilities ourselves by training current or hiring new employees with the skills.	23 64.13 38.01	17 65.59 34.09	18 68.50 23.05	34 60.44 27.81	16 56.56 33.75	34 51.62 23.18	18 60.00 25.67	26 59.62 36.25	20 76.75 23.41	31 56.39 33.12	17 53.24 27.50	19 52.63 29.12	16 65.94 27.94	5 54.00 16.73	28 56.43 23.80
			f			c		cDEH	b	B	B				B
We partner with other marketing agencies to learn new marketing skills.	23 10.22 24.05	17 12.06 16.68	18 11.06 16.68	34 18.65 21.90	16 15.94 20.27	34 19.85 17.60	18 12.78 12.51	26 10.19 22.74	20 10.75 13.89	31 16.55 19.10	17 22.35 27.05	19 19.47 17.15	16 15.94 24.51	5 18.00 12.55	28 15.00 11.94
We partner with other companies to learn new marketing skills.	23 12.39 16.91	17 12.94 23.32	18 14.06 16.24	34 8.91 10.71	16 13.13 17.59	34 11.62 12.11	18 15.83 15.17	26 17.69 21.03	20 7.50 13.91	31 13.42 15.16	17 12.65 19.21	19 12.63 12.73	16 7.81 14.60	5 6.00 6.52	28 14.82 12.80
We partner with other consultancies to learn new marketing skills.	23 13.26 23.87	17 8.24 12.86	18 5.00 8.74	34 11.41 15.46	16 7.81 15.05	34 13.38 14.76	18 10.00 7.86	26 12.50 22.55	20 4.75 8.03	31 12.19 16.49	17 10.00 17.59	19 11.58 17.95	16 7.19 8.16	5 14.00 15.57	28 11.07 7.50
			f			c			H						B
We buy other companies to acquire new marketing skills.	23 0.00 0.00	17 1.18 3.32	18 1.39 4.79	34 0.59 2.05	16 6.56 13.99	34 3.53 7.54	18 1.39 2.87	26 0.00 0.00	20 0.25 1.12	31 1.45 3.46	17 1.76 6.11	19 3.68 11.77	16 3.13 7.04	5 8.00 13.04	28 2.68 5.85
			ef	d	d			g	g					bc	

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

 **Topic 4: Marketing Capabilities**

How important are your company's marketing capabilities to the success of your business?

	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 very important	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%
2	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%
3	4 2.3%	3 4.7%	1 2.0%	0 0.0%	0 0.0%	2 3.2%	0 0.0%	1 3.1%	0 0.0%	0 0.0%	2 2.9%	2 2.0%
4=Moderately important	18 10.5%	8 12.5%	6 12.2%	3 7.5%	1 5.6%	8 12.9%	6 11.3%	2 6.3%	2 14.3%	0 0.0%	9 12.9%	9 8.9%
5	32 18.7%	15 23.4%	10 20.4%	4 10.0%	3 16.7%	15 24.2%	11 20.8%	6 18.8%	0 0.0%	0 0.0%	20 28.6%	12 11.9%
6	51 29.8%	21 32.8%	14 28.6%	11 27.5%	5 27.8%	15 24.2%	20 37.7%	8 25.0%	4 28.6%	2 33.3%	24 34.3%	27 26.7%
7=Very important	66 38.6%	17 26.6%	18 36.7%	22 55.0%	9 50.0%	22 35.5%	16 30.2%	15 46.9%	8 57.1%	4 66.7%	15 21.4%	51 50.5%
Mean	5.92	5.64 C	5.86 c	6.30 Ab	6.22	5.76	5.87	6.06	6.29	6.67	5.59 B	6.15 A

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

Topic 4: Marketing Capabilities

How important are your company's marketing capabilities to the success of your business?

	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
1=Not very important	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%
2	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%
3	1 4.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 6.3%	0 0.0%	1 7.7%	0 0.0%	1 2.9%	0 0.0%	0 0.0%
4=Moderately important	2 8.7%	0 0.0%	2 12.5%	0 0.0%	0 0.0%	1 25.0%	2 11.1%	1 14.3%	5 31.3%	1 33.3%	2 15.4%	1 20.0%	0 0.0%	1 25.0%	0 0.0%
5	2 8.7%	1 11.1%	2 12.5%	1 25.0%	1 25.0%	0 0.0%	4 22.2%	1 14.3%	3 18.8%	0 0.0%	4 30.8%	0 0.0%	9 26.5%	2 50.0%	2 18.2%
6	6 26.1%	3 33.3%	5 31.3%	2 50.0%	1 25.0%	2 50.0%	1 5.6%	3 42.9%	6 37.5%	1 33.3%	2 15.4%	3 60.0%	11 32.4%	1 25.0%	4 36.4%
7=Very important	12 52.2%	5 55.6%	7 43.8%	1 25.0%	2 50.0%	1 25.0%	11 61.1%	2 28.6%	1 6.3%	1 33.3%	4 30.8%	1 20.0%	13 38.2%	0 0.0%	5 45.5%
Mean	6.13	6.44	6.06	6.00	6.25	5.75	6.17	5.86	5.06	5.67	5.46	5.80	6.03	5.00	6.27

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

 **Topic 4: Marketing Capabilities**

How important are your company's marketing capabilities to the success of your business?

	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 very important	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%
2	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%
3	1 4.3%	0 0.0%	1 5.3%	0 0.0%	0 0.0%	1 2.6%	0 0.0%	0 0.0%	2 10.0%	1 3.1%	1 5.6%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
4=Moderately important	1 4.3%	1 5.9%	2 10.5%	5 13.9%	3 17.6%	5 13.2%	1 5.3%	1 3.8%	2 10.0%	3 9.4%	4 22.2%	3 13.6%	3 17.6%	0 0.0%	2 6.7%
5	4 17.4%	4 23.5%	3 15.8%	5 13.9%	4 23.5%	7 18.4%	4 21.1%	4 15.4%	2 10.0%	6 18.8%	3 16.7%	6 27.3%	3 17.6%	1 16.7%	7 23.3%
6	5 21.7%	5 29.4%	5 26.3%	14 38.9%	3 17.6%	14 36.8%	5 26.3%	8 30.8%	4 20.0%	9 28.1%	7 38.9%	6 27.3%	6 35.3%	2 33.3%	9 30.0%
7=Very important	12 52.2%	7 41.2%	8 42.1%	12 33.3%	7 41.2%	11 28.9%	9 47.4%	13 50.0% d	10 50.0% d	13 40.6%	3 16.7% ab	7 31.8%	5 29.4%	3 50.0%	12 40.0%
Mean	6.13	6.06	5.89	5.92	5.82	5.76	6.16	6.27 D	5.90	5.94	5.39 Ah	5.77	5.76	6.33	6.03 d

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



Topic 4: Marketing Capabilities

Why are marketing capabilities important to your business?

N=165

	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
Get higher ROI for every marketing dollar spent	129 78.2%	49 80.3%	35 74.5%	30 76.9%	15 83.3%	48 80.0%	37 71.2%	23 76.7%	13 92.9%	6 100.0%	49 72.1%	80 82.5%
Increase the speed of marketing actions	108 65.5%	41 67.2%	31 66.0%	26 66.7%	10 55.6%	40 66.7%	36 69.2%	16 53.3%	9 64.3%	5 83.3%	49 72.1%	59 60.8%
Increase the effectiveness of managing customers	86 52.1%	34 55.7%	21 44.7%	20 51.3%	11 61.1%	30 50.0%	29 55.8%	15 50.0%	10 71.4% e	1 16.7% d	40 58.8%	46 47.4%
Show our marketing strength to potential or current partners	69 41.8%	23 37.7%	26 55.3% c	13 33.3% b	7 38.9%	27 45.0%	19 36.5%	12 40.0%	6 42.9%	4 66.7%	29 42.6%	40 41.2%
Difficult for competitors to imitate marketing strategies	61 37.0%	22 36.1%	17 36.2%	18 46.2%	4 22.2%	22 36.7%	22 42.3%	9 30.0%	5 35.7%	2 33.3%	27 39.7%	34 35.1%
Attract or retain top managers and employees	55 33.3%	19 31.1%	15 31.9%	14 35.9%	7 38.9%	22 36.7%	16 30.8%	13 43.3%	2 14.3%	1 16.7%	22 32.4%	33 34.0%

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

 **Topic 4: Marketing Capabilities**

Why are marketing capabilities important to your business?

N=165

	Industry Sector														
	Banking Finance Insurance	Communi- cations Media	Consumer Packaged Goods	Consumer Services	Education	Energy	Healthca- re	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
Get higher ROI for every marketing dollar spent	19 86.4%	8 88.9%	10 66.7% m	2 66.7%	4 100.0%	3 75.0%	13 72.2%	5 71.4%	10 66.7% m	3 100.0%	7 58.3% m	3 60.0%	30 90.9% cikn	2 50.0% m	10 90.9%
Increase the speed of marketing actions	15 68.2%	4 44.4%	9 60.0%	2 66.7%	2 50.0%	3 75.0%	12 66.7%	4 57.1%	9 60.0%	2 66.7%	7 58.3%	2 40.0%	25 75.8%	3 75.0%	9 81.8%
Increase the effectiveness of managing customers	7 31.8% dfG	5 55.6%	5 33.3% dfg	3 100.0% ac	1 25.0%	4 100.0% acm	14 77.8% Acm	5 71.4%	9 60.0%	1 33.3%	6 50.0%	2 40.0%	14 42.4% fg	3 75.0%	7 63.6%
Show our marketing strength to potential or current partners	9 40.9% 1	6 66.7% fm	4 26.7% ikl	1 33.3%	1 25.0% 1	0 0.0% bikl	8 44.4% 1	2 28.6% 1	10 66.7% cfM	2 66.7%	8 66.7% cfM	5 100.0% acefghMo	7 21.2% bIKLn	3 75.0% m	3 27.3% 1
Difficult for competitors to imitate marketing strategies	8 36.4% j	4 44.4%	7 46.7%	0 0.0%	2 50.0%	2 50.0%	6 33.3% j	1 14.3% jl	6 40.0%	3 100.0% aghkmn	2 16.7% jl	4 80.0% hkn	12 36.4% j	0 0.0% jl	4 36.4%
Attract or retain top managers and employees	5 22.7% n	3 33.3%	7 46.7%	1 33.3%	0 0.0%	1 25.0%	6 33.3%	1 14.3%	5 33.3%	1 33.3%	4 33.3%	3 60.0%	11 33.3%	3 75.0% a	4 36.4%

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



Topic 4: Marketing Capabilities

Why are marketing capabilities important to your business?

N=165

	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
Get higher ROI for every marketing dollar spent	16 72.7%	14 82.4%	13 72.2%	29 80.6%	12 70.6%	28 80.0%	16 84.2%	21 80.8%	13 72.2%	25 80.6%	13 76.5%	16 72.7%	12 75.0%	4 66.7%	25 86.2%
Increase the speed of marketing actions	15 68.2%	10 58.8%	12 66.7%	24 66.7%	13 76.5%	24 68.6%	10 52.6%	20 76.9%	10 55.6% e	19 61.3%	8 47.1% e	19 86.4% bdh	11 68.8%	4 66.7%	17 58.6% e
Increase the effectiveness of managing customers	12 54.5% g	9 52.9% g	7 38.9% G	19 52.8% g	7 41.2% g	15 42.9% G	16 84.2% abCdeF	13 50.0%	9 50.0%	15 48.4%	7 41.2% h	9 40.9% h	7 43.8%	5 83.3%	21 72.4% de
Show our marketing strength to potential or current partners	12 54.5%	4 23.5%	7 38.9%	18 50.0%	8 47.1%	13 37.1%	7 36.8%	14 53.8% c	7 38.9%	8 25.8% ad	10 58.8% c	10 45.5%	8 50.0%	2 33.3%	10 34.5%
Difficult for competitors to imitate marketing strategies	7 31.8%	7 41.2%	5 27.8%	14 38.9%	8 47.1%	12 34.3%	8 42.1%	9 34.6%	5 27.8%	10 32.3%	7 41.2%	11 50.0%	7 43.8%	4 66.7%	8 27.6%
Attract or retain top managers and employees	5 22.7% e	4 23.5% e	7 38.9%	11 30.6%	10 58.8% ab	13 37.1%	5 26.3%	6 23.1% e	5 27.8%	9 29.0%	6 35.3%	12 54.5% ah	8 50.0% h	3 50.0%	6 20.7% ef

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

Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252	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	238 94.4%	94 95.9%	58 92.1%	55 93.2%	31 100.0%	89 94.7%	71 95.9%	42 93.3%	20 95.2%	9 90.0%	97 97.0%	140 92.7%
Digital marketing	235 93.3%	91 92.9%	57 90.5%	58 98.3%	29 93.5%	84 89.4%	72 97.3%	42 93.3%	20 95.2%	10 100.0%	95 95.0%	139 92.1%
Advertising	219 86.9%	84 85.7%	51 81.0%	55 93.2%	28 90.3%	81 86.2%	65 87.8%	38 84.4%	18 85.7%	10 100.0%	85 85.0%	133 88.1%
Social media	210 83.3%	83 84.7%	51 81.0%	49 83.1%	26 83.9%	75 79.8%	67 90.5%	37 82.2%	15 71.4%	9 90.0%	82 82.0%	127 84.1%
Marketing analytics	198 78.6%	79 80.6%	49 77.8%	45 76.3%	25 80.6%	70 74.5%	63 85.1%	37 82.2%	13 61.9%	9 90.0%	86 86.0%	111 73.5%
Positioning	193 76.6%	76 77.6%	48 76.2%	45 76.3%	23 74.2%	72 76.6%	61 82.4%	35 77.8%	13 61.9%	7 70.0%	73 73.0%	119 78.8%
Marketing research	186 73.8%	73 74.5%	39 61.9%	49 83.1%	25 80.6%	60 63.8%	63 85.1%	36 80.0%	14 66.7%	6 60.0%	78 78.0%	107 70.9%
Public relations	182 72.2%	71 72.4%	49 77.8%	38 64.4%	23 74.2%	73 77.7%	57 77.0%	31 68.9%	9 42.9%	7 70.0%	73 73.0%	108 71.5%
Promotion	176 69.8%	70 71.4%	45 71.4%	40 67.8%	21 67.7%	60 63.8%	57 77.0%	30 66.7%	15 71.4%	9 90.0%	79 79.0%	96 63.6%
Lead generation	169 67.1%	74 75.5%	45 71.4%	28 47.5%	22 71.0%	67 71.3%	48 64.9%	29 64.4%	13 61.9%	7 70.0%	77 77.0%	91 60.3%
Marketing technology	165 65.5%	65 66.3%	43 68.3%	36 61.0%	21 67.7%	56 59.6%	51 68.9%	35 77.8%	13 61.9%	6 60.0%	72 72.0%	92 60.9%

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

 **Topic 5: Marketing Leadership**

What is marketing primarily responsible for in your company?

N=252	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
Customer Insight	143 56.7%	54 55.1%	30 47.6% c	39 66.1% b	20 64.5%	41 43.6% Bcd	50 67.6% Ae	30 66.7% ae	15 71.4% ae	3 30.0% bcd	59 59.0%	84 55.6%
Competitive intelligence	135 53.6%	61 62.2% c	30 47.6%	26 44.1% a	18 58.1%	48 51.1%	42 56.8%	28 62.2%	9 42.9%	3 30.0%	59 59.0%	75 49.7%
Revenue growth	107 42.5%	36 36.7%	25 39.7%	30 50.8%	16 51.6%	31 33.0% Ce	29 39.2%	26 57.8% A	11 52.4%	7 70.0% a	41 41.0%	65 43.0%
Customer experience	101 40.1%	34 34.7% c	20 31.7% c	32 54.2% ab	15 48.4%	31 33.0% D	32 43.2% d	20 44.4% d	15 71.4% Abce	3 30.0% d	43 43.0%	58 38.4%
Market entry strategies	93 36.9%	40 40.8% b	16 25.4% ac	25 42.4% b	12 38.7%	34 36.2%	31 41.9%	14 31.1%	9 42.9%	4 40.0%	36 36.0%	56 37.1%
e-commerce	85 33.7%	30 30.6% bC	10 15.9% aCd	34 57.6% ABd	11 35.5% bc	6 6.4% BCDe	37 50.0% A	25 55.6% A	11 52.4% A	3 30.0% a	28 28.0%	57 37.7%
New products or new services	83 32.9%	29 29.6% C	11 17.5% C	32 54.2% AB	11 35.5%	16 17.0% BCd	36 48.6% Ae	19 42.2% A	9 42.9% a	1 10.0% b	28 28.0%	55 36.4%
Customer relationship management	77 30.6%	26 26.5%	19 30.2%	21 35.6%	11 35.5%	25 26.6%	22 29.7%	15 33.3%	8 38.1%	1 10.0%	30 30.0%	47 31.1%
Pricing	71 28.2%	34 34.7% B	10 15.9% AC	22 37.3% Bd	5 16.1% c	14 14.9% BC	32 43.2% A	16 35.6% A	7 33.3%	2 20.0%	26 26.0%	45 29.8%

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



Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252	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
Innovation	70 27.8%	23 23.5% cd	10 15.9% CD	24 40.7% aB	13 41.9% aB	13 13.8% BCe	30 40.5% A	17 37.8% A	4 19.0%	4 40.0% a	19 19.0% b	51 33.8% a
Market selection	49 19.4%	17 17.3%	11 17.5%	16 27.1%	5 16.1%	10 10.6% Bd	21 28.4% A	10 22.2%	6 28.6% a	2 20.0%	19 19.0%	29 19.2%
Sales	49 19.4%	12 12.2% C	11 17.5%	18 30.5% A	8 25.8%	11 11.7% Cde	11 14.9% c	15 33.3% Ab	7 33.3% a	4 40.0% a	17 17.0%	32 21.2%
Talent acquisition and retention	39 15.5%	9 9.2% c	11 17.5%	14 23.7% a	5 16.1%	12 12.8%	15 20.3%	8 17.8%	3 14.3%	0 0.0%	20 20.0%	19 12.6%
Customer service	32 12.7%	9 9.2%	7 11.1%	10 16.9%	6 19.4%	10 10.6%	8 10.8%	8 17.8%	3 14.3%	2 20.0%	10 10.0%	22 14.6%
Privacy	23 9.1%	5 5.1%	8 12.7%	7 11.9%	3 9.7%	5 5.3% c	8 10.8%	7 15.6% a	2 9.5%	1 10.0%	10 10.0%	13 8.6%
Distribution	19 7.5%	10 10.2%	5 7.9%	2 3.4%	2 6.5%	7 7.4%	6 8.1%	3 6.7%	2 9.5%	0 0.0%	6 6.0%	13 8.6%
Sustainability	17 6.7%	7 7.1%	3 4.8%	7 11.9% d	0 0.0% c	7 7.4%	3 4.1%	4 8.9%	3 14.3%	0 0.0%	7 7.0%	10 6.6%
Stock market performance	5 2.0%	1 1.0%	2 3.2%	2 3.4%	0 0.0%	2 2.1%	2 2.7%	1 2.2%	0 0.0%	0 0.0%	4 4.0%	1 0.7%

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

Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252

	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	30 100.0% h	11 91.7%	24 96.0%	7 87.5%	5 100.0%	8 100.0%	26 92.9%	10 83.3% a	23 95.8%	3 100.0%	16 94.1%	7 100.0%	45 95.7%	9 100.0%	14 87.5%
Digital marketing	29 96.7% k	11 91.7%	23 92.0%	8 100.0%	5 100.0%	8 100.0%	26 92.9%	12 100.0%	20 83.3%	3 100.0%	13 76.5% amo	7 100.0%	45 95.7% k	9 100.0%	16 100.0% k
Advertising	27 90.0%	9 75.0%	23 92.0%	8 100.0%	4 80.0%	8 100.0%	22 78.6%	11 91.7%	21 87.5%	3 100.0%	12 70.6%	7 100.0%	41 87.2%	7 77.8%	15 93.8%
Positioning	26 86.7% il	8 66.7%	22 88.0% il	5 62.5%	4 80.0%	8 100.0% il	22 78.6%	10 83.3%	15 62.5% acf	2 66.7%	12 70.6%	3 42.9% acfm	39 83.0% l	6 66.7%	10 62.5%
Marketing analytics	25 83.3%	9 75.0%	20 80.0%	7 87.5%	5 100.0%	8 100.0%	22 78.6%	9 75.0%	17 70.8%	2 66.7%	12 70.6%	4 57.1%	37 78.7%	8 88.9%	13 81.3%
Marketing research	25 83.3% el	7 58.3% c	22 88.0% beikl	5 62.5%	2 40.0% acmo	5 62.5%	23 82.1% l	9 75.0%	15 62.5% c	2 66.7%	10 58.8% c	3 42.9% acgmo	38 80.9% el	6 66.7%	14 87.5% el
Public relations	25 83.3% dHN	8 66.7%	20 80.0% dHN	3 37.5% acflM	3 60.0%	8 100.0% dHiN	21 75.0% hN	4 33.3% ACFgIM	15 62.5% fn	3 100.0% n	12 70.6% n	7 100.0% dhN	39 83.0% DHN	2 22.2% ACFGijkL Mo	11 68.8% n
Social media	24 80.0%	11 91.7%	23 92.0% k	6 75.0%	4 80.0%	7 87.5%	25 89.3%	9 75.0%	18 75.0%	3 100.0%	11 64.7% cm	7 100.0%	41 87.2% k	7 77.8%	13 81.3%
Promotion	22 73.3%	7 58.3% h	14 56.0% H	6 75.0%	4 80.0%	6 75.0%	19 67.9% h	12 100.0% bCgikmo	16 66.7% h	2 66.7%	12 70.6% h	5 71.4%	34 72.3% h	7 77.8%	10 62.5% h
Marketing technology	22 73.3%	9 75.0%	15 60.0%	5 62.5%	3 60.0%	6 75.0%	19 67.9%	5 41.7% m	14 58.3%	1 33.3%	10 58.8%	4 57.1%	36 76.6% h	6 66.7%	10 62.5%
Lead generation	21 70.0% C	7 58.3% fm	7 28.0% ADEFGijkl M	7 87.5% C	5 100.0% C	8 100.0% bChino	19 67.9% C	7 58.3% fm	15 62.5% cfm	3 100.0% c	11 64.7% c	5 71.4% c	40 85.1% bChino	5 55.6% fm	9 56.3% fm

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

Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252

	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
Customer Insight	14 46.7% c	8 66.7%	19 76.0% akm	6 75.0%	2 40.0%	5 62.5%	20 71.4% m	7 58.3%	13 54.2%	2 66.7%	7 41.2% c	3 42.9%	21 44.7% cg	6 66.7%	10 62.5%
Revenue growth	13 43.3%	7 58.3%	14 56.0% i	3 37.5%	4 80.0% il	2 25.0%	11 39.3%	5 41.7%	6 25.0% cem	1 33.3%	7 41.2%	1 14.3% e	24 51.1% i	3 33.3%	6 37.5%
Competitive intelligence	13 43.3% m	5 41.7%	12 48.0%	3 37.5%	4 80.0% l	4 50.0%	19 67.9% l	8 66.7% l	11 45.8% m	1 33.3%	7 41.2% m	1 14.3% eghMo	33 70.2% aikL	4 44.4%	10 62.5% l
Customer experience	12 40.0% m	5 41.7%	12 48.0% m	2 25.0% n	2 40.0%	4 50.0%	13 46.4% m	6 50.0% m	11 45.8% m	2 66.7%	5 29.4% n	3 42.9%	9 19.1% acghiNo	7 77.8% dkM	8 50.0% m
Market entry strategies	11 36.7%	6 50.0%	10 40.0%	4 50.0%	0 0.0% g	2 25.0%	15 53.6% e	4 33.3%	8 33.3%	1 33.3%	4 23.5%	1 14.3%	19 40.4%	4 44.4%	4 25.0%
Customer relationship management	10 33.3% o	4 33.3%	3 12.0% hjO	3 37.5%	2 40.0%	1 12.5% o	8 28.6% o	6 50.0% cm	7 29.2% o	2 66.7% c	6 35.3%	2 28.6%	9 19.1% hO	3 33.3%	11 68.8% aCfgiM
Sales	8 26.7% m	4 33.3% m	7 28.0% m	2 25.0%	2 40.0% m	1 12.5%	5 17.9%	3 25.0%	3 12.5%	1 33.3%	1 5.9%	1 14.3%	4 8.5% abceo	2 22.2%	5 31.3% m
Innovation	7 23.3% C	4 33.3%	15 60.0% AeFgKM	2 25.0%	0 0.0% c	0 0.0% Ch	9 32.1% cm	5 41.7% fm	8 33.3% m	0 0.0%	2 11.8% C	3 42.9%	6 12.8% Cghio	3 33.3%	6 37.5% m
New products or new services	6 20.0% CHi	3 25.0% C	20 80.0% ABdeFGiK LMO	3 37.5% cm	1 20.0% c	1 12.5% Ch	8 28.6% Chm	8 66.7% AfgIM	12 50.0% acM	1 33.3%	6 35.3% CM	1 14.3% Ch	3 6.4% CdghHIKNO	4 44.4% M	6 37.5% CM

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Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

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	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
Privacy	5 16.7% m	2 16.7% m	1 4.0%	1 12.5%	1 20.0%	1 12.5%	2 7.1%	2 16.7% m	2 8.3%	0 0.0%	2 11.8%	1 14.3%	1 2.1% abh	0 0.0%	2 12.5%
Talent acquisition and retention	5 16.7%	1 8.3%	7 28.0% i	1 12.5%	0 0.0%	0 0.0%	8 28.6% i	1 8.3%	1 4.2% cgk	0 0.0%	5 29.4% i	1 14.3%	5 10.6%	1 11.1%	3 18.8%
e-commerce	4 13.3% CDhiNO	4 33.3% ko	17 68.0% AfGjKIM	5 62.5% AgKm	2 40.0% k	1 12.5% cnO	6 21.4% CdknO	5 41.7% aK	10 41.7% aKo	0 0.0% co	0 0.0% bCDegHlm NO	1 14.3% co	12 25.5% CdknO	6 66.7% AfgKm	12 75.0% AbFGijKlM
Pricing	3 10.0% Cgim	3 25.0%	14 56.0% AFkl	3 37.5%	1 20.0%	0 0.0% Ci	9 32.1% a	4 33.3%	9 37.5% af	0 0.0%	3 17.6% c	0 0.0% c	15 31.9% a	3 33.3%	4 25.0%
Market selection	2 6.7% cgN	3 25.0%	7 28.0% a	2 25.0%	0 0.0%	0 0.0% n	8 28.6% a	2 16.7%	4 16.7% n	0 0.0%	3 17.6%	0 0.0% n	10 21.3% n	5 55.6% Afilm	3 18.8%
Distribution	1 3.3% bi	3 25.0% acm	0 0.0% bi	1 12.5%	0 0.0%	1 12.5%	2 7.1%	1 8.3%	5 20.8% acm	0 0.0%	1 5.9%	1 14.3%	2 4.3% bi	0 0.0%	1 6.3%
Sustainability	1 3.3%	0 0.0%	4 16.0% g	0 0.0%	0 0.0%	1 12.5%	0 0.0% c	0 0.0%	3 12.5%	0 0.0%	0 0.0%	0 0.0%	5 10.6%	1 11.1%	2 12.5%
Customer service	1 3.3% blo	3 25.0% aM	5 20.0% m	2 25.0% m	1 20.0%	2 25.0% m	3 10.7%	1 8.3%	3 12.5%	0 0.0%	3 17.6% m	2 28.6% aM	1 2.1% BcdfkLO	1 11.1%	4 25.0% aM
Stock market performance	0 0.0%	0 0.0%	2 8.0%	0 0.0%	0 0.0%	0 0.0%	1 3.6%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 2.1%	1 11.1%	0 0.0%

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Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252

	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
Digital marketing	30 88.2% fg	16 80.0% DFg	21 80.8% DFg	53 98.1% BC	17 94.4%	62 98.4% aBC	33 100.0% abc	35 92.1%	18 78.3% EfgH	38 86.4% ch	25 92.6%	31 100.0% Bc	22 100.0% b	17 100.0% b	49 98.0% Bc
Brand	29 85.3% df	18 90.0%	24 92.3%	53 98.1% a	18 100.0%	61 96.8% a	32 97.0%	34 89.5%	21 91.3%	40 90.9%	26 96.3%	31 100.0%	22 100.0%	16 94.1%	48 96.0%
Positioning	25 73.5%	14 70.0%	19 73.1%	41 75.9%	14 77.8%	50 79.4%	28 84.8%	28 73.7%	17 73.9%	29 65.9%	22 81.5%	24 77.4%	19 86.4%	14 82.4%	40 80.0%
Social media	25 73.5% df	12 60.0% DF	20 76.9%	50 92.6% aBg	16 88.9%	58 92.1% aBg	25 75.8% df	26 68.4% dFg	19 82.6% f	35 79.5% f	25 92.6% a	27 87.1%	22 100.0% Abch	16 94.1% a	40 80.0% f
Advertising	25 73.5% DF	17 85.0%	19 73.1% DF	51 94.4% ACg	17 94.4%	61 96.8% ACG	26 78.8% dF	28 73.7% e	21 91.3%	36 81.8%	24 88.9%	30 96.8% a	20 90.9%	16 94.1%	44 88.0%
Marketing analytics	22 64.7% dfg	10 50.0% DeFG	20 76.9%	46 85.2% aB	15 83.3% b	55 87.3% aB	29 87.9% aB	20 52.6% dEFGH	17 73.9% g	31 70.5% fg	22 81.5% a	27 87.1% A	21 95.5% Ac	17 100.0% Abc	43 86.0% A
Promotion	22 64.7%	14 70.0%	17 65.4%	36 66.7%	13 72.2%	44 69.8%	28 84.8%	24 63.2%	16 69.6%	28 63.6%	20 74.1%	20 64.5%	15 68.2%	15 88.2%	38 76.0%
Lead generation	21 61.8%	14 70.0%	19 73.1%	39 72.2%	15 83.3%	40 63.5%	20 60.6%	23 60.5% d	14 60.9% d	27 61.4% d	24 88.9% abcGh	25 80.6% g	16 72.7%	8 47.1% De	32 64.0% d
Marketing research	21 61.8% fg	10 50.0% ceFG	21 80.8% b	38 70.4%	15 83.3% b	52 82.5% aB	28 84.8% aB	23 60.5% GH	13 56.5% GH	32 72.7% g	21 77.8% g	22 71.0% g	15 68.2% g	17 100.0% ABcdef	43 86.0% AB
Competitive intelligence	20 58.8%	10 50.0%	14 53.8%	30 55.6%	10 55.6%	32 50.8%	18 54.5%	22 57.9%	9 39.1%	24 54.5%	18 66.7%	16 51.6%	10 45.5%	9 52.9%	27 54.0%
Public relations	19 55.9% De	13 65.0% D	20 76.9% g	49 90.7% ABFG	16 88.9% aG	46 73.0% dG	15 45.5% cDEF	22 57.9% cDeF	19 82.6% H	35 79.5% aH	24 88.9% AH	26 83.9% aH	20 90.9% AH	12 70.6%	24 48.0% BCDEF

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 **Topic 5: Marketing Leadership**

What is marketing primarily responsible for in your company?

N=252

	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
Market entry strategies	18 52.9% c	5 25.0%	6 23.1% a	20 37.0%	7 38.9%	21 33.3%	15 45.5%	16 42.1%	8 34.8%	12 27.3% d	14 51.9% c	10 32.3%	9 40.9%	7 41.2%	17 34.0%
Customer Insight	17 50.0% g	7 35.0% dG	12 46.2% g	33 61.1% b	10 55.6%	38 60.3%	25 75.8% aBc	18 47.4% h	12 52.2%	21 47.7% h	16 59.3%	19 61.3%	11 50.0%	11 64.7%	35 70.0% ac
New products or new services	15 44.1% d	4 20.0% c	13 50.0% bD	10 18.5% aCG	7 38.9%	18 28.6%	15 45.5% D	17 44.7% e	7 30.4%	15 34.1%	7 25.9%	6 19.4% ag	6 27.3%	8 47.1% e	17 34.0%
Pricing	15 44.1% bdf	3 15.0% a	10 38.5%	12 22.2% a	6 33.3%	14 22.2% a	11 33.3%	14 36.8% e	7 30.4%	12 27.3%	6 22.2%	4 12.9% ag	6 27.3%	7 41.2% e	15 30.0%
Customer experience	15 44.1% b	3 15.0% aefg	9 34.6%	20 37.0%	9 50.0%	28 44.4% b	16 48.5% b	16 42.1%	8 34.8%	12 27.3% e	13 48.1%	16 51.6% c	9 40.9%	9 52.9%	18 36.0%
Revenue growth	14 41.2%	7 35.0%	11 42.3%	26 48.1%	6 33.3%	24 38.1%	18 54.5%	17 44.7%	6 26.1% dg	18 40.9%	15 55.6% b	12 38.7%	7 31.8% g	11 64.7% bf	21 42.0%
Customer relationship management	14 41.2% e	4 20.0%	11 42.3% e	12 22.2% g	2 11.1% acg	19 30.2%	14 42.4% de	16 42.1% dg	6 26.1%	11 25.0%	5 18.5% a	10 32.3%	7 31.8%	2 11.8% ah	20 40.0% g
Marketing technology	14 41.2% Defg	13 65.0%	17 65.4%	41 75.9% A	14 77.8% a	42 66.7% a	23 69.7% a	19 50.0% g	14 60.9%	29 65.9%	20 74.1%	21 67.7%	13 59.1%	14 82.4% a	35 70.0%
Market selection	12 35.3% cdF	3 15.0%	3 11.5% ag	8 14.8% ag	5 27.8% f	6 9.5% AeG	12 36.4% cdF	9 23.7%	5 21.7%	5 11.4%	6 22.2%	4 12.9%	5 22.7%	4 23.5%	11 22.0%

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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
Sales	11 32.4% Ef	2 10.0%	7 26.9% e	11 20.4% e	0 0.0% Ac dg	9 14.3% a	8 24.2% e	12 31.6% E	7 30.4% E	8 18.2%	6 22.2% e	1 3.2% ABd	3 13.6%	3 17.6%	9 18.0%
Innovation	10 29.4%	4 20.0%	6 23.1%	10 18.5% eG	8 44.4% d	16 25.4% g	15 45.5% Df	12 31.6%	4 17.4%	13 29.5%	4 14.8%	8 25.8%	8 36.4%	6 35.3%	15 30.0%
Customer service	9 26.5% DG	1 5.0%	7 26.9% Dg	3 5.6% AC	3 16.7%	7 11.1%	1 3.0% Ac	9 23.7% dh	4 17.4%	8 18.2%	1 3.7% a	3 9.7%	2 9.1%	1 5.9%	4 8.0% a
e-commerce	9 26.5%	5 25.0%	6 23.1%	18 33.3%	9 50.0%	26 41.3%	11 33.3%	11 28.9%	7 30.4%	12 27.3%	8 29.6%	13 41.9%	8 36.4%	8 47.1%	18 36.0%
Talent acquisition and retention	6 17.6%	2 10.0%	3 11.5%	4 7.4% g	4 22.2%	12 19.0%	8 24.2% d	8 21.1% c	2 8.7%	2 4.5% aEgh	2 7.4%	8 25.8% C	3 13.6%	4 23.5% c	10 20.0% c
Distribution	5 14.7%	1 5.0%	4 15.4%	4 7.4%	0 0.0%	3 4.8%	2 6.1%	5 13.2% e	3 13.0% e	5 11.4%	0 0.0%	0 0.0% ab	2 9.1%	0 0.0%	4 8.0%
Privacy	3 8.8%	0 0.0% e	2 7.7%	6 11.1%	5 27.8% bfg	5 7.9% e	2 6.1% e	4 10.5%	1 4.3%	4 9.1%	3 11.1%	5 16.1%	1 4.5%	2 11.8%	3 6.0%
Stock market performance	0 0.0%	0 0.0%	0 0.0%	2 3.7%	0 0.0%	1 1.6%	2 6.1%	0 0.0%	0 0.0%	1 2.3%	0 0.0%	1 3.2%	0 0.0%	1 5.9%	2 4.0%
Sustainability	0 0.0%	2 10.0%	2 7.7%	4 7.4%	2 11.1%	5 7.9%	2 6.1%	3 7.9%	2 8.7%	1 2.3%	3 11.1%	2 6.5%	2 9.1%	2 11.8%	2 4.0%

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Topic 5: Marketing Leadership

Rate how well marketing works with these different functions to drive enterprise growth: (1=Poorly - Very well)

	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
Sales/distribution and marketing work closely together to drive growth	5.79	5.75	5.84	5.93	5.50	5.95	5.64	5.87	5.62	5.70	5.70	5.85
Human resources and marketing work closely together to drive growth	4.44	4.28	4.65	4.28	4.81	4.71	4.25	4.11	4.71	4.30	4.45	4.43
Operations/production and marketing work closely together to drive growth	4.96	4.70	5.17	5.20	4.81	5.00	4.54	5.20	5.38	5.60	4.83	5.04
		bc	a	a		b	acde	b	b	b		
Finance and marketing work closely together to drive growth	4.78	4.47	4.78	5.22	4.87	4.71	4.48	4.98	5.48	5.60	4.56	4.91
		C		A		d	De		aB	b		
IT/digital and marketing work closely together to drive growth	5.09	4.69	5.25	5.42	5.39	5.10	4.82	5.36	5.71	4.90	4.89	5.23
		bCd	a	A	a		d		b			

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

 **Topic 5: Marketing Leadership**

Rate how well marketing works with these different functions to drive enterprise growth: (1=Poorly - Very well)

	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/distribution and marketing work closely together to drive growth	5.67	5.75	5.96	6.13	6.00	5.25	5.69	6.08	5.63	5.67	6.06	5.86	5.91	5.89	5.25
			o								o		o		ckm
Human resources and marketing work closely together to drive growth	4.30	4.36	4.40	4.50	4.40	5.38	4.67	3.67	3.87	5.33	4.94	4.29	4.70	3.67	4.33
						i			fk		i				
Operations/production and marketing work closely together to drive growth	5.10	5.25	4.92	5.38	5.20	4.50	4.59	5.08	4.17	5.33	5.18	5.29	5.13	4.67	5.31
	i								aMo				I		i
Finance and marketing work closely together to drive growth	4.77	5.00	5.20	5.13	4.20	5.13	4.96	5.00	4.33	4.00	4.65	4.43	4.83	4.11	4.63
			n											c	
IT/digital and marketing work closely together to drive growth	5.40	5.00	5.04	5.38	4.80	5.00	5.15	5.17	4.63	4.33	4.82	4.86	5.15	5.44	5.38
	i								a						

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Topic 5: Marketing Leadership

Rate how well marketing works with these different functions to drive enterprise growth: (1=Poorly - Very well)

	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/distribution and marketing work closely together to drive growth	5.91	5.45	6.12	5.83	5.78	5.84	5.41	5.81	5.78	5.70	6.12	5.68	5.82	6.06	5.63
		c	bg				c								
Human resources and marketing work closely together to drive growth	4.66	4.37	4.23	4.75	4.17	4.49	3.94	4.42	4.41	4.63	4.65	4.42	4.41	4.47	4.20
				g			d								
Operations/production and marketing work closely together to drive growth	5.33	5.10	4.58	4.93	4.72	5.08	4.67	5.24	4.96	4.82	5.04	4.87	4.91	5.35	4.76
	g						a								
Finance and marketing work closely together to drive growth	5.03	5.15	4.27	4.92	4.61	4.70	4.79	4.81	5.09	4.68	4.80	4.65	4.55	5.29	4.68
IT/digital and marketing work closely together to drive growth	5.45	5.55	4.38	5.22	4.72	4.95	5.27	5.65	4.96	5.00	4.92	4.84	4.86	4.94	5.22
	c	c	abdg	c			c	bcdef	a	a	a	a	a		

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



Topic 5: Marketing Leadership

What actions do you take to show the value of marketing to other functions?

N=248	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
Develop stronger marketing performance tracking	214 86.3%	83 86.5%	52 82.5%	50 84.7%	29 96.7%	76 81.7%	66 91.7%	37 82.2%	18 90.0%	9 90.0%	91 91.0%	122 83.0%
Demonstrate the financial impact of marketing	186 75.0%	69 71.9% c	42 66.7% c	51 86.4% ab	24 80.0%	66 71.0%	55 76.4%	35 77.8%	15 75.0%	9 90.0%	75 75.0%	110 74.8%
Demonstrate the value of brand and customer relationships	167 67.3%	65 67.7%	42 66.7%	35 59.3% d	25 83.3% c	66 71.0%	51 70.8%	26 57.8%	12 60.0%	7 70.0%	65 65.0%	101 68.7%
Collect competitor data	146 58.9%	64 66.7%	33 52.4%	31 52.5%	18 60.0%	57 61.3%	46 63.9%	23 51.1%	9 45.0%	5 50.0%	63 63.0%	82 55.8%
Run experiments	143 57.7%	57 59.4%	35 55.6%	34 57.6%	17 56.7%	46 49.5% d	43 59.7%	27 60.0%	15 75.0% a	8 80.0%	55 55.0%	87 59.2%
Collect customer data	135 54.4%	55 57.3%	31 49.2%	33 55.9%	16 53.3%	51 54.8%	39 54.2%	22 48.9%	13 65.0%	6 60.0%	52 52.0%	82 55.8%
Offer novel customer insights	125 50.4%	46 47.9%	31 49.2%	31 52.5%	17 56.7%	44 47.3%	39 54.2%	23 51.1%	9 45.0%	7 70.0%	50 50.0%	74 50.3%

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

 **Topic 5: Marketing Leadership**

What actions do you take to show the value of marketing to other functions?

N=248

	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
Develop stronger marketing performance tracking	26 86.7%	10 83.3%	19 76.0%	8 100.0%	5 100.0%	8 100.0%	23 85.2%	10 83.3%	20 87.0%	3 100.0%	13 76.5%	5 71.4%	40 87.0%	9 100.0%	15 93.8%
Demonstrate the financial impact of marketing	25 83.3% K	10 83.3% k	21 84.0% K	7 87.5% k	3 60.0%	7 87.5% k	20 74.1% k	9 75.0%	14 60.9% m	3 100.0%	7 41.2% AbCdfgM	4 57.1%	39 84.8% iK	7 77.8%	10 62.5%
Demonstrate the value of brand and customer relationships	25 83.3% Ceh	9 75.0%	10 40.0% AFIM	5 62.5%	2 40.0% af	8 100.0% Cehin	18 66.7%	6 50.0% af	14 60.9% f	3 100.0%	11 64.7%	6 85.7% c	34 73.9% C	5 55.6% f	11 68.8%
Collect competitor data	18 60.0%	8 66.7%	13 52.0%	3 37.5%	3 60.0%	4 50.0%	18 66.7%	8 66.7%	17 73.9%	2 66.7%	9 52.9%	3 42.9%	28 60.9%	4 44.4%	8 50.0%
Run experiments	19 63.3%	7 58.3%	14 56.0%	6 75.0%	4 80.0%	5 62.5%	14 51.9%	6 50.0%	12 52.2%	2 66.7%	7 41.2% m	2 28.6% m	32 69.6% kl	5 55.6%	8 50.0%
Collect customer data	16 53.3% o	8 66.7%	10 40.0% iO	4 50.0%	1 20.0% iO	5 62.5%	17 63.0%	6 50.0% o	16 69.6% ce	2 66.7%	7 41.2% O	4 57.1%	21 45.7% O	4 44.4% o	14 87.5% aCEhKMn
Offer novel customer insights	19 63.3% mo	4 33.3%	14 56.0%	5 62.5%	2 40.0%	6 75.0%	14 51.9%	7 58.3%	10 43.5%	3 100.0% mo	7 41.2%	5 71.4%	18 39.1% aj	6 66.7%	5 31.3% aj

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

 **Topic 5: Marketing Leadership**

What actions do you take to show the value of marketing to other functions?

N=248

	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
Develop stronger marketing performance tracking	25 73.5% Df	14 73.7% df	20 80.0%	51 94.4% Ab	16 88.9%	57 91.9% ab	29 87.9%	29 76.3% h	15 65.2% cdefH	37 88.1% b	24 92.3% b	29 93.5% b	20 90.9% b	14 87.5%	46 92.0% aB
Demonstrate the financial impact of marketing	19 55.9% eFg	12 63.2% f	16 64.0% f	41 75.9%	16 88.9% a	53 85.5% Abc	28 84.8% a	21 55.3% degH	13 56.5% egH	29 69.0% h	21 80.8% a	26 83.9% ab	17 77.3%	14 87.5% ab	45 90.0% ABc
Demonstrate the value of brand and customer relationships	20 58.8% f	11 57.9%	12 48.0% F	38 70.4%	10 55.6% f	49 79.0% aCe	24 72.7%	22 57.9% F	14 60.9% f	27 64.3% f	18 69.2%	20 64.5% f	20 90.9% Abceg	10 62.5% f	36 72.0%
Collect competitor data	16 47.1% d	9 47.4% d	14 56.0%	40 74.1% ab	11 61.1%	36 58.1%	20 60.6%	19 50.0%	10 43.5%	27 64.3%	18 69.2%	21 67.7%	11 50.0%	11 68.8%	29 58.0%
Run experiments	17 50.0%	11 57.9%	13 52.0%	37 68.5%	10 55.6%	33 53.2%	21 63.6%	19 50.0%	9 39.1% d	27 64.3%	18 69.2% b	20 64.5%	13 59.1%	11 68.8%	26 52.0%
Collect customer data	21 61.8% b	6 31.6% adE	12 48.0%	34 63.0% b	14 77.8% Bf	29 46.8% e	18 54.5%	22 57.9% g	9 39.1%	25 59.5% g	17 65.4% g	17 54.8%	15 68.2% g	4 25.0% acdf	26 52.0%
Offer novel customer insights	14 41.2% g	4 21.1% dEFG	9 36.0% g	27 50.0% b	12 66.7% B	36 58.1% B	22 66.7% aBc	18 47.4%	6 26.1% eH	18 42.9% h	13 50.0%	17 54.8% b	11 50.0%	8 50.0%	34 68.0% Bc

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

 **Topic 5: 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
CEO												
Yes	141 58.8%	60 61.9%	34 55.7%	30 52.6%	16 66.7%	48 52.7%	46 64.8%	29 69.0%	10 47.6%	4 50.0%	64 66.0%	76 53.5%
No	99 41.3%	37 38.1%	27 44.3%	27 47.4%	8 33.3%	43 47.3%	25 35.2%	13 31.0%	11 52.4%	4 50.0%	33 34.0%	66 46.5%
Board												
Yes	34 44.7%	13 48.1%	6 30.0%	12 57.1%	3 37.5%	8 30.8% c	12 48.0%	10 66.7% ae	3 50.0%	0 0.0% c	20 48.8%	14 40.0%
No	42 55.3%	14 51.9%	14 70.0%	9 42.9%	5 62.5%	18 69.2% c	13 52.0%	5 33.3% ae	3 50.0%	3 100.0% c	21 51.2%	21 60.0%
CFO												
Yes	132 55.5%	55 57.3%	28 46.7% d	32 55.2%	17 70.8% b	45 50.0%	44 62.0%	26 61.9%	10 47.6%	4 50.0%	61 63.5% b	70 49.6% a
No	106 44.5%	41 42.7%	32 53.3% d	26 44.8%	7 29.2% b	45 50.0%	27 38.0%	16 38.1%	11 52.4%	4 50.0%	35 36.5% b	71 50.4% a

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

Topic 5: 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
CEO															
Yes	17 60.7%	4 36.4%	13 54.2%	6 85.7%	1 25.0%	3 37.5%	15 62.5%	9 75.0%	15 62.5%	1 33.3%	12 70.6%	1 14.3%	31 67.4%	2 25.0%	10 62.5%
No	11 39.3%	7 63.6%	11 45.8%	1 14.3%	3 75.0%	5 62.5%	9 37.5%	3 25.0%	9 37.5%	2 66.7%	5 29.4%	6 85.7%	15 32.6%	6 75.0%	6 37.5%
Board															
Yes	5 41.7%	1 25.0%	5 71.4%	2 66.7%	0 0.0%	1 20.0%	7 63.6%	2 33.3%	3 60.0%	0 0.0%	0 0.0%	0 0.0%	4 44.4%	2 33.3%	2 100.0%
No	7 58.3%	3 75.0%	2 28.6%	1 33.3%	0 0.0%	4 80.0%	4 36.4%	4 66.7%	2 40.0%	0 0.0%	2 100.0%	4 100.0%	5 55.6%	4 66.7%	0 0.0%
CFO															
Yes	19 67.9%	6 54.5%	14 56.0%	4 66.7%	1 25.0%	3 37.5%	11 45.8%	6 50.0%	13 56.5%	1 33.3%	9 52.9%	1 14.3%	34 73.9%	2 25.0%	8 50.0%
No	9 32.1%	5 45.5%	11 44.0%	2 33.3%	3 75.0%	5 62.5%	13 54.2%	6 50.0%	10 43.5%	2 66.7%	8 47.1%	6 85.7%	12 26.1%	6 75.0%	8 50.0%

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

Excludes Non-Profits

 **Topic 5: 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
CEO															
Yes	16 48.5% g	11 55.0%	16 66.7%	31 59.6%	10 55.6%	32 55.2% g	24 77.4% af	19 51.4%	10 52.6%	26 59.1%	14 51.9%	20 66.7%	14 63.6%	6 40.0% h	32 69.6% g
No	17 51.5% g	9 45.0%	8 33.3%	21 40.4%	8 44.4%	26 44.8% g	7 22.6% af	18 48.6%	9 47.4%	18 40.9%	13 48.1%	10 33.3%	8 36.4%	9 60.0% h	14 30.4% g
Board															
Yes	2 66.7%	1 100.0%	1 50.0%	5 62.5%	0 0.0%	13 39.4%	12 46.2%	1 50.0%	0 0.0%	5 55.6%	2 66.7%	4 50.0%	3 30.0%	2 22.2%	17 48.6%
No	1 33.3%	0 0.0%	1 50.0%	3 37.5%	3 100.0%	20 60.6%	14 53.8%	1 50.0%	0 0.0%	4 44.4%	1 33.3%	4 50.0%	7 70.0%	7 77.8%	18 51.4%
CFO															
Yes	15 45.5%	9 45.0%	14 60.9%	30 57.7%	10 55.6%	34 58.6%	20 64.5%	15 40.5% f	9 47.4%	23 53.5%	14 53.8%	19 61.3%	15 68.2% a	9 60.0%	28 62.2%
No	18 54.5%	11 55.0%	9 39.1%	22 42.3%	8 44.4%	24 41.4%	11 35.5%	22 59.5% f	10 52.6%	20 46.5%	12 46.2%	12 38.7%	7 31.8% a	6 40.0%	17 37.8%

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



Topic 5: Marketing Leadership

How does marketing cope with this increased pressure?

N=153	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
Focus on short-term impact over long-run gains	108 70.6%	45 72.6%	29 76.3%	22 62.9%	12 66.7%	38 71.7%	32 66.7%	25 73.5%	7 58.3%	3 100.0%	46 68.7%	61 71.8%
Return to established marketing strategies	72 47.1%	33 53.2%	17 44.7%	12 34.3%	10 55.6%	26 49.1%	23 47.9%	14 41.2%	7 58.3%	0 0.0%	33 49.3%	39 45.9%
Emphasize spending over building capabilities	41 26.8%	17 27.4%	5 13.2%	14 40.0%	5 27.8%	12 22.6%	13 27.1%	9 26.5%	3 25.0%	2 66.7%	18 26.9%	22 25.9%
Limit the ambition of marketing's goals	39 25.5%	19 30.6%	6 15.8%	9 25.7%	5 27.8%	18 34.0%	8 16.7%	6 17.6%	5 41.7%	1 33.3%	16 23.9%	23 27.1%

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

 **Topic 5: Marketing Leadership**

How does marketing cope with this increased pressure?

N=153

	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
Focus on short-term impact over long-run gains	11 61.1%	3 37.5% gmo	11 68.8%	4 66.7%	1 50.0%	3 75.0%	13 86.7% bh	4 44.4% gmo	10 71.4%	1 100.0%	8 61.5%	1 100.0%	28 82.4% bh	2 50.0%	8 100.0% bh
Return to established marketing strategies	12 66.7% c	3 37.5%	5 31.3% af	3 50.0%	0 0.0%	4 100.0% cgio	6 40.0% f	5 55.6%	5 35.7% f	1 100.0%	8 61.5%	0 0.0%	16 47.1%	2 50.0%	2 25.0% f
Emphasize spending over building capabilities	3 16.7% c	4 50.0% k	8 50.0% aik	2 33.3%	1 50.0%	1 25.0%	6 40.0%	1 11.1%	2 14.3% c	0 0.0%	1 7.7% bco	0 0.0%	8 23.5%	0 0.0%	4 50.0% k
Limit the ambition of marketing's goals	4 22.2%	3 37.5%	4 25.0%	1 16.7%	1 50.0%	2 50.0% g	1 6.7% fjlo	3 33.3%	3 21.4%	1 100.0% g	5 38.5%	1 100.0% g	6 17.6%	0 0.0%	4 50.0% g

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



Topic 5: Marketing Leadership

How does marketing cope with this increased pressure?

N=153

	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
Focus on short-term impact over long-run gains	11 55.0% e	8 72.7%	13 72.2%	22 66.7%	11 91.7% a	27 73.0%	16 72.7%	11 50.0% Eh	10 71.4%	15 60.0% e	10 76.9%	22 91.7% Acg	12 75.0%	4 50.0% e	24 77.4% a
Return to established marketing strategies	8 40.0%	5 45.5%	6 33.3%	18 54.5%	4 33.3%	20 54.1%	11 50.0%	9 40.9%	5 35.7%	13 52.0%	6 46.2%	10 41.7%	8 50.0%	5 62.5%	16 51.6%
Emphasize spending over building capabilities	9 45.0% b	1 9.1% a	4 22.2%	9 27.3%	3 25.0%	10 27.0%	5 22.7%	10 45.5% ch	4 28.6%	3 12.0% a	4 30.8%	6 25.0%	5 31.3%	3 37.5%	6 19.4% a
Limit the ambition of marketing's goals	8 40.0% G	4 36.4% g	6 33.3% g	6 18.2%	3 25.0%	11 29.7% g	1 4.5% Abcf	10 45.5% gh	3 21.4%	6 24.0%	4 30.8%	5 20.8%	7 43.8% gh	0 0.0% af	4 12.9% af

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

 **Topic 5: Marketing Leadership**

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

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
Managing the present	249 68.20 17.13	97 69.43 18.65	62 69.47 16.04	58 66.95 16.18	31 65.10 15.60	93 70.08 16.34	73 67.53 18.93	45 66.40 15.35	21 63.24 18.62	10 72.50 15.86	100 70.15 17.59	148 66.81 16.77
Preparing for the future	249 31.80 17.13	97 30.57 18.65	62 30.53 16.04	58 33.05 16.18	31 34.90 15.60	93 29.92 16.34	73 32.47 18.93	45 33.60 15.35	21 36.76 18.62	10 27.50 15.86	100 29.85 17.59	148 33.19 16.77

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

 **Topic 5: Marketing Leadership**

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

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
Managing the present	30 62.50 17.51 cK	12 64.83 17.90 k	24 73.54 13.39 adgn	8 61.88 13.87 cjk	5 78.00 10.95	8 62.50 19.09 k	28 64.11 18.00 ck	12 63.75 25.15	24 70.21 16.91	3 81.67 7.64 d	17 76.59 12.74 Abdfgn	7 71.43 14.92	46 70.11 17.08	8 59.75 18.91 ck	16 71.56 13.38
Preparing for the future	30 37.50 17.51 cK	12 35.17 17.90 k	24 26.46 13.39 adgn	8 38.13 13.87 cjk	5 22.00 10.95	8 37.50 19.09 k	28 35.89 18.00 ck	12 36.25 25.15	24 29.79 16.91	3 18.33 7.64 d	17 23.41 12.74 Abdfgn	7 28.57 14.92	46 29.89 17.08	8 40.25 18.91 ck	16 28.44 13.38

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

 **Topic 5: Marketing Leadership**

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

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
Managing the present	34 66.82 19.26	20 75.25 11.29	26 73.96 17.22	54 67.31 17.85	18 73.89 14.41	61 66.69 16.24	32 62.50 17.83	38 67.63 18.84	23 74.35 15.32	44 72.32 15.99	27 66.48 17.31	31 70.97 15.89	22 65.82 18.78	16 63.00 18.46	48 63.96 16.11
		fG	g		g	b	Bce		gh	h				b	bc
Preparing for the future	34 33.18 19.26	20 24.75 11.29	26 26.04 17.22	54 32.69 17.85	18 26.11 14.41	61 33.31 16.24	32 37.50 17.83	38 32.37 18.84	23 25.65 15.32	44 27.68 15.99	27 33.52 17.31	31 29.03 15.89	22 34.18 18.78	16 37.00 18.46	48 36.04 16.11
		fG	g		g	b	Bce		gh	h				b	bc

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

 **Topic 5: Marketing Leadership**

How often are you/your senior marketing leader asked by the CEO or CFO to participate in board meetings and earnings calls? (1=Never, 7=All the time) - PUBLIC COMPANIES ONLY

	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
Board meetings												
Mean	4.55	5.48 bC	4.09 a	3.81 A	4.38	4.08	4.96	5.06	3.83	3.33	4.95	4.06
Preparation for earnings calls												
Mean	4.62	5.24 c	4.45	3.85 a	4.75	4.73	5.04	3.81	4.67	4.00	4.81	4.39
Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01												

 **Topic 5: Marketing Leadership**

How often are you/your senior marketing leader asked by the CEO or CFO to participate in board meetings and earnings calls?
(1=Never, 7=All the time) - PUBLIC COMPANIES ONLY

	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
Board meetings															
Mean	3.58 fM	4.50 m	4.14 m	3.67 m	---	6.20 al	4.92	4.83	5.20 l	---	3.50	2.50 fiM	6.08 AbcdLNO	3.83 M	2.50 M
Preparation for earnings calls															
Mean	3.17 im	5.00	4.00	5.33	---	5.40	5.08	5.00	6.20 aL	---	3.50	3.00 l	5.42 a	4.83	1.00
Significance Tests Between Columns: Lower case: p<.05 Upper case: p<.01															



Topic 5: Marketing Leadership

How often are you/your senior marketing leader asked by the CEO or CFO to participate in board meetings and earnings calls?
(1=Never, 7=All the time) - PUBLIC COMPANIES ONLY

	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
Board meetings															
Mean	6.00	6.00	5.50	4.25	3.67	4.33	4.74	5.50	---	4.33	3.33	4.50	3.80	4.22	4.92
Preparation for earnings calls															
Mean	6.33 _e	4.00	7.00	4.63	3.00 _a	4.58	4.50	6.00	---	4.44	4.00	4.88	4.70	4.22	4.66

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

 **Topic 5: Marketing Leadership**

To what extent is marketing viewed as a core business function in your 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
1=Not at all	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%
2	9 3.6%	7 7.2%	2 3.2%	0 0.0%	0 0.0%	7 7.4%	2 2.7%	0 0.0%	0 0.0%	0 0.0%	6 6.0%	3 2.0%
3	16 6.4%	3 3.1%	6 9.7%	7 11.9%	0 0.0%	3 3.2%	4 5.5%	4 8.9%	3 15.0%	0 0.0%	7 7.0%	9 6.0%
4	26 10.4%	13 13.4%	7 11.3%	2 3.4%	4 12.9%	6 6.4%	12 16.4%	3 6.7%	2 10.0%	1 10.0%	14 14.0%	12 8.1%
5	61 24.4%	23 23.7%	16 25.8%	14 23.7%	8 25.8%	22 23.4%	15 20.5%	17 37.8%	2 10.0%	1 10.0%	24 24.0%	37 24.8%
6	60 24.0%	26 26.8%	14 22.6%	10 16.9%	10 32.3%	23 24.5%	20 27.4%	8 17.8%	5 25.0%	4 40.0%	25 25.0%	34 22.8%
7=Very often	78 31.2%	25 25.8%	17 27.4%	26 44.1%	9 29.0%	33 35.1%	20 27.4%	13 28.9%	8 40.0%	4 40.0%	24 24.0%	54 36.2%
Mean	5.52	5.37	5.37	5.78	5.77	5.60	5.47	5.51	5.65	6.10	5.27	5.69

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

 **Topic 5: Marketing Leadership**

To what extent is marketing viewed as a core business function in your 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
1=Not at all	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%
2	1 3.3%	0 0.0%	0 0.0% i	0 0.0%	0 0.0%	0 0.0%	1 3.6%	0 0.0%	4 16.7% cM	0 0.0%	2 11.8% m	0 0.0%	0 0.0% lk	0 0.0%	1 6.3%
3	2 6.7%	1 9.1%	2 8.0%	1 12.5%	1 20.0% g	1 12.5%	0 0.0% eJn	0 0.0%	1 4.2%	1 33.3% Gkm	0 0.0% j	1 14.3%	1 2.2% jn	2 22.2% gm	2 12.5%
4	6 20.0% m	0 0.0%	2 8.0%	0 0.0%	0 0.0%	0 0.0%	1 3.6% l	2 16.7% m	5 20.8% m	1 33.3% m	3 17.6% m	2 28.6% gM	1 2.2% ahijklL	1 11.1%	2 12.5%
5	7 23.3%	0 0.0% demn	7 28.0%	3 37.5% b	2 40.0% b	2 25.0%	5 17.9%	3 25.0%	7 29.2%	0 0.0%	4 23.5%	0 0.0%	14 30.4% b	4 44.4% b	3 18.8%
6	7 23.3%	4 36.4%	5 20.0%	4 50.0% ho	1 20.0%	1 12.5%	10 35.7% o	1 8.3% d	4 16.7%	1 33.3%	3 17.6%	3 42.9% o	14 30.4%	1 11.1%	1 6.3% dgl
7=Very often	7 23.3%	6 54.5% di	9 36.0%	0 0.0% bfggho	1 20.0%	4 50.0% di	11 39.3% di	6 50.0% di	3 12.5% bfggho	0 0.0%	5 29.4%	1 14.3%	16 34.8%	1 11.1%	7 43.8% di
Mean	5.27 bgm	6.27 aljn	5.68 i	5.25	5.20	5.88	6.00 aljn	5.92 i	4.63 BcGhM	4.33 bgm	5.24 m	5.14	5.93 aljkN	4.78 bgM	5.38

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

Topic 5: Marketing Leadership

To what extent is marketing viewed as a core business function in your 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
1=Not at all	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%
2	0 0.0%	0 0.0%	1 3.8%	1 1.9%	5 27.8%	0 0.0%	1 3.0%	0 0.0%	1 4.3%	2 4.5%	1 3.7%	2 6.5%	2 9.1%	0 0.0%	1 2.0%
3	0 0.0%	1 5.0%	2 7.7%	3 5.6%	1 5.6%	6 9.7%	2 6.1%	1 2.7%	2 8.7%	2 4.5%	3 11.1%	1 3.2%	2 9.1%	2 12.5%	3 6.0%
4	1 3.0%	1 5.0%	4 15.4%	7 13.0%	1 5.6%	5 8.1%	7 21.2%	1 2.7%	2 8.7%	10 22.7%	2 7.4%	3 9.7%	1 4.5%	0 0.0%	7 14.0%
5	5 15.2%	6 30.0%	6 23.1%	11 20.4%	3 16.7%	20 32.3%	10 30.3%	8 21.6%	4 17.4%	9 20.5%	2 7.4%	11 35.5%	5 22.7%	4 25.0%	18 36.0%
6	8 24.2%	5 25.0%	6 23.1%	15 27.8%	3 16.7%	18 29.0%	5 15.2%	6 16.2%	7 30.4%	10 22.7%	9 33.3%	7 22.6%	4 18.2%	7 43.8%	10 20.0%
7=Very often	19 57.6%	7 35.0%	7 26.9%	17 31.5%	5 27.8%	13 21.0%	8 24.2%	21 56.8%	7 30.4%	11 25.0%	10 37.0%	7 22.6%	8 36.4%	3 18.8%	11 22.0%
Mean	6.36 bCDEFG	5.80 a	5.35 A	5.61 Ac	4.72 Ad	5.44 A	5.21 A	6.22 bCEfH	5.52 a	5.27 A	5.67	5.32 A	5.41 a	5.56	5.32 A

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

 **Topic 5: Marketing Leadership**

To what extent does the CFO work as a business partner with marketing leaders to build a business case for marketing spending?

	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	20 8.1%	11 11.5%	4 6.6%	5 8.5%	0 0.0%	9 9.7%	7 9.6%	3 6.7%	1 4.8%	0 0.0%	9 9.2%	11 7.4%
2	29 11.7%	12 12.5%	8 13.1%	6 10.2%	3 9.7%	13 14.0%	9 12.3%	3 6.7%	1 4.8%	1 10.0%	13 13.3%	16 10.7%
3	24 9.7%	10 10.4%	8 13.1%	3 5.1%	3 9.7%	8 8.6%	10 13.7%	3 6.7%	3 14.3%	0 0.0%	10 10.2%	14 9.4%
4	39 15.7%	10 10.4%	13 21.3%	9 15.3%	7 22.6%	13 14.0%	11 15.1%	7 15.6%	3 14.3%	3 30.0%	13 13.3%	26 17.4%
5	49 19.8%	22 22.9%	10 16.4%	12 20.3%	5 16.1%	16 17.2%	13 17.8%	13 28.9%	5 23.8%	0 0.0%	24 24.5%	25 16.8%
6	50 20.2%	19 19.8%	13 21.3%	11 18.6%	7 22.6%	18 19.4%	13 17.8%	12 26.7%	3 14.3%	4 40.0%	19 19.4%	30 20.1%
7=Very Likely	37 14.9%	12 12.5%	5 8.2%	13 22.0%	6 19.4%	16 17.2%	10 13.7%	4 8.9%	5 23.8%	2 20.0%	10 10.2%	27 18.1%
Mean	4.48	4.30	4.25	4.73	4.90	4.42	4.27	4.69	4.86	5.20	4.30	4.58

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

Topic 5: Marketing Leadership

To what extent does the CFO work as a business partner with marketing leaders to build a business case for marketing spending?

	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	1 3.3% j	1 9.1%	2 8.0%	1 12.5%	1 20.0%	0 0.0%	1 3.6%	1 9.1%	4 17.4%	1 33.3% a	2 11.8%	0 0.0%	3 6.5%	0 0.0%	2 12.5%
2	5 16.7%	1 9.1%	3 12.0%	0 0.0%	1 20.0%	2 25.0%	2 7.1%	3 27.3%	2 8.7%	1 33.3%	1 5.9%	2 28.6%	4 8.7%	0 0.0%	2 12.5%
3	3 10.0%	0 0.0%	2 8.0%	1 12.5%	0 0.0%	0 0.0%	4 14.3%	1 9.1%	4 17.4%	0 0.0%	3 17.6%	1 14.3%	3 6.5%	0 0.0%	2 12.5%
4	6 20.0%	3 27.3%	4 16.0%	2 25.0%	0 0.0%	1 12.5%	3 10.7%	0 0.0%	3 13.0%	0 0.0%	3 17.6%	1 14.3%	8 17.4%	2 22.2%	3 18.8%
5	5 16.7% N	1 9.1% n	4 16.0% N	1 12.5% n	0 0.0% n	2 25.0%	8 28.6% n	4 36.4% m	6 26.1% n	1 33.3%	3 17.6% n	0 0.0% n	5 10.9% hN	6 66.7% AbCdegikl Mo	3 18.8% n
6	6 20.0%	3 27.3%	5 20.0%	3 37.5% hi	2 40.0% hi	1 12.5%	3 10.7% m	0 0.0% dem	1 4.3% deM	0 0.0%	4 23.5%	2 28.6%	16 34.8% ghl	1 11.1%	3 18.8%
7=Very Likely	4 13.3%	2 18.2%	5 20.0%	0 0.0%	1 20.0%	2 25.0%	7 25.0%	2 18.2%	3 13.0%	0 0.0%	1 5.9%	1 14.3%	7 15.2%	0 0.0%	1 6.3%
Mean	4.43	4.73	4.60	4.38	4.40	4.75	4.86	4.00	3.87 m	2.67 n	4.18	4.29	4.83 i	4.89 j	4.00

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

 **Topic 5: Marketing Leadership**

To what extent does the CFO work as a business partner with marketing leaders to build a business case for marketing spending?

	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	1 3.0%	1 5.0%	4 16.0%	3 5.6%	3 16.7%	7 11.3%	1 3.1%	1 2.7%	3 13.0%	4 9.3%	0 0.0%	5 16.1%	2 9.1%	1 6.3%	4 8.2%
2	2 6.1%	2 10.0%	4 16.0%	6 11.1%	2 11.1%	7 11.3%	3 9.4%	3 8.1%	4 17.4%	6 14.0%	5 18.5%	5 16.1%	2 9.1%	1 6.3%	3 6.1%
3	1 3.0%	4 20.0%	3 12.0%	3 5.6%	3 16.7%	6 9.7%	4 12.5%	4 10.8%	1 4.3%	6 14.0%	2 7.4%	2 6.5%	2 9.1%	1 6.3%	6 12.2%
4	8 24.2%	3 15.0%	3 12.0%	13 24.1%	3 16.7%	4 6.5%	5 15.6%	9 24.3%	4 17.4%	8 18.6%	5 18.5%	4 12.9%	3 13.6%	0 0.0%	6 12.2%
5	6 18.2%	2 10.0%	2 8.0%	10 18.5%	5 27.8%	17 27.4%	7 21.9%	5 13.5%	1 4.3%	6 14.0%	4 14.8%	9 29.0%	5 22.7%	7 43.8%	12 24.5%
6	8 24.2%	5 25.0%	5 20.0%	9 16.7%	1 5.6%	14 22.6%	8 25.0%	8 21.6%	5 21.7%	6 14.0%	5 18.5%	5 16.1%	6 27.3%	4 25.0%	11 22.4%
7=Very Likely	7 21.2%	3 15.0%	4 16.0%	10 18.5%	1 5.6%	7 11.3%	4 12.5%	7 18.9%	5 21.7%	7 16.3%	6 22.2%	1 3.2%	2 9.1%	2 12.5%	7 14.3%
Mean	5.06 cE	4.50	4.04 a	4.63	3.67 Ag	4.40	4.69 e	4.78 e	4.35	4.21	4.74	3.84 a	4.50	4.94	4.63

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



Topic 6: Marketing Spending

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

	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	146	58	39	33	16	55	47	24	12	6	58	88
Mean	9.64	7.03	9.20	13.83	11.52	7.86	8.89	10.76	14.26	19.61	7.22	11.23
SD	7.74	5.51	7.17	8.66	10.21	6.26	7.31	7.52	10.57	9.01	6.42	8.15
		Cd	c	Ab	a	DE	dE	e	Ab	ABc	B	A

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

 **Topic 6: Marketing Spending**

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

	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	21	7	14	3	5	4	15	4	14	2	9	5	31	2	10
Mean	9.47	11.57	14.80	19.11	11.60	4.50	8.35	10.50	5.94	3.00	7.39	10.67	8.76	10.50	11.78
SD	9.98	7.04	9.23	8.70	8.85	3.10	5.80	6.81	6.81	2.83	4.97	9.54	5.05	13.44	9.69
			fglkM	fgikM		cd	cd		Cd		cd		CD		

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

 **Topic 6: Marketing Spending**

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	22	16	16	34	14	27	16	25	19	30	15	17	12	2	26
Mean	13.68	12.13	9.03	7.51	8.26	8.81	9.60	14.30	9.47	10.00	4.53	8.03	7.79	20.00	8.91
SD	8.31	6.50	5.47	6.68	9.51	7.90	8.95	8.03	6.19	7.37	3.82	7.47	8.25	0.00	8.42
	Df	d		Ab		a		bcDefh	ad	ad	Abc	a	a		a

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



Topic 6: Marketing Spending

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

	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	154	61	41	34	18	56	51	29	11	4	63	91
Mean	8.96	7.02	10.07	11.99	7.24	7.97	6.59	10.61	18.64	18.75	6.28	10.81
SD	11.45	10.08	13.38	12.40	7.99	10.71	8.96	13.14	16.23	10.31	8.91	12.64
		c		a		D	De		AB	b	b	a

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



Topic 6: Marketing Spending

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

	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	21	6	15	3	5	4	17	5	13	3	12	4	33	3	10
Mean	7.43	18.00	11.53	11.00	18.40	7.13	5.88	6.80	5.64	0.35	6.84	12.55	10.56	3.83	8.80
SD	11.37	19.53	12.65	5.57	19.31	11.99	8.36	4.82	11.90	0.56	9.37	12.52	10.50	5.35	12.84
		g		j	g		be			d					

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

 **Topic 6: Marketing Spending**

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	20	15	18	34	17	33	15	23	19	30	18	21	15	4	24
Mean	13.34	17.40	11.14	5.86	6.86	5.70	9.45	16.26	13.31	8.80	5.48	3.97	11.53	7.63	4.28
SD	13.21	13.58	13.78	9.46	10.41	6.95	12.91	13.43	14.12	11.73	10.09	6.26	13.55	5.59	4.08
	dF	DeF		aB	b	AB		cDEH	EH	a	A	ABf	eh		ABf

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

 **Topic 6: Marketing Spending**

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	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
Overall marketing spending	163 1.74 15.40	65 -0.19 13.48	44 2.75 14.96	36 0.90 19.35	18 7.99 13.37	59 2.06 15.64	52 1.26 12.38	30 -0.32 17.35	14 5.63 20.82	5 12.00 13.04	70 1.25 13.07	93 2.12 17.00
		d		a								
Digital marketing spending	160 8.20 22.46	64 4.13 18.99	42 7.10 14.72	36 12.56 28.32	18 16.57 32.04	59 6.19 19.29	50 10.50 22.35	30 3.30 24.40	14 17.86 31.41	5 16.00 15.17	67 5.22 18.16	93 10.35 24.98
		d		a								

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

 **Topic 6: Marketing Spending**

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	22 6.00 13.19 bc	8 -8.13 17.31 ak	15 -6.40 15.77 ak	3 4.67 11.02	5 3.00 16.43	4 -4.00 21.85	16 3.55 15.38	6 0.67 5.89	16 0.25 9.71	3 7.33 29.14	12 5.42 10.10 bc	5 4.00 5.48	34 0.91 17.54	4 3.75 16.01	10 8.28 21.71
Digital marketing spending	22 16.73 16.28 bcikM	8 -1.00 14.17 aj	15 3.33 21.27 a	3 5.33 9.50	5 8.00 13.04	4 0.00 29.44	15 10.55 28.70	5 6.00 4.18	16 4.56 19.87 a	3 26.00 22.54 bk	12 5.00 8.79 aj	5 6.00 5.48	33 2.58 20.88 AO	4 6.25 18.87	10 30.70 45.23 M

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



Topic 6: Marketing Spending

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	22 6.02 15.86 e	16 5.90 12.95 e	18 -3.26 19.29	38 2.67 16.63	17 -5.12 12.58 ab	33 3.25 16.03	17 -0.33 8.58	24 4.85 16.90	19 5.81 11.72	32 -0.61 16.82	19 3.21 17.52	22 -0.71 16.75	16 -0.75 14.01	4 13.35 19.54	27 -0.36 11.49
Digital marketing spending	22 10.55 24.31	16 6.44 21.27	18 10.67 30.88	38 10.00 23.31	17 5.18 17.14	32 8.28 21.86	15 5.49 14.54	24 10.33 24.68	19 12.47 14.38	32 7.03 26.94	19 9.11 24.03	22 6.82 25.24	16 8.56 21.03	4 18.25 13.12	24 2.89 17.92

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

 **Topic 6: Marketing Spending**

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

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
Digital marketing spending	154 10.40 15.08	60 9.37 13.63	43 8.82 14.50	34 13.03 18.21	17 12.75 14.89	57 10.11 14.58	47 11.14 14.25	29 9.34 16.02	12 13.73 18.77	6 15.00 11.83	67 8.62 13.58	87 11.77 16.08
Overall marketing spending	154 7.61 15.72	62 5.44 13.91	41 8.18 14.88	35 9.14 19.93	16 11.21 14.28	57 6.88 13.02	48 6.43 14.58	29 6.29 20.23	12 17.38 19.96	6 13.33 13.29	66 6.24 14.96	88 8.64 16.27
Brand building	146 5.87 14.72	57 5.14 15.49	41 8.31 17.04	32 5.02 12.71	16 3.88 8.17	52 9.14 16.42	45 3.75 12.90	29 3.60 14.50	12 4.86 14.03	6 8.33 16.02	62 4.56 14.91	84 6.83 14.59
New product introductions	146 5.85 9.74	58 7.04 9.30	40 2.97 8.26	32 9.29 12.67	16 1.88 2.96	54 5.32 8.16	45 6.12 11.61	27 6.09 10.19	12 8.53 10.76	6 2.50 4.18	63 6.97 10.49	83 5.00 9.10
Customer relationship management	142 3.50 7.69	58 3.93 8.42	39 4.53 6.89	30 1.90 8.72	15 2.33 3.06	53 3.41 6.98	42 3.67 7.10	27 3.89 10.34	12 3.92 8.91	6 1.67 2.58	61 3.54 8.30	81 3.46 7.25
New service introductions	138 3.17 6.20	55 3.53 6.67	38 3.04 5.96	30 3.27 6.91	15 2.00 3.02	51 2.94 4.99	41 2.90 5.41	27 3.21 7.42	11 7.92 9.60	6 -0.83 4.92	57 3.76 6.29	81 2.76 6.13
Customer experience spending	141 3.03 6.89	57 3.75 7.20	39 1.64 5.82	30 2.83 8.49	15 4.33 4.06	53 3.03 6.58	42 2.64 6.59	27 2.79 7.17	11 5.51 10.44	6 3.33 4.08	59 2.91 7.65	82 3.12 6.33
Traditional advertising spending	144 -1.50 13.33	58 -0.32 12.23	39 -2.16 14.67	32 -4.06 15.69	15 1.07 6.96	52 0.88 12.96	43 -3.19 9.55	29 -3.80 18.51	12 -1.24 15.35	6 0.83 6.65	61 -2.00 15.17	83 -1.13 11.88

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

Topic 6: Marketing Spending

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

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	21 14.86 16.27	8 6.55 17.02	14 13.20 20.66	2 1.00 5.66	5 14.40 13.39	4 12.50 15.00	16 12.67 14.93	6 3.04 14.26	13 13.06 16.32	3 26.67 15.28 Klm	11 7.18 7.22 J	5 8.00 2.74 j	33 6.59 14.47 j	3 6.67 5.77	10 10.04 15.87
Overall marketing spending	21 9.06 14.77	8 7.50 13.63	14 3.71 12.95	2 2.50 10.61	5 12.00 14.40	4 3.75 4.79	16 9.60 16.66	5 3.60 2.19	14 10.83 18.70	3 21.67 17.56	11 10.30 15.29	5 10.00 9.35	33 4.87 18.01	3 3.33 20.82	10 6.79 20.82
Brand building	20 7.67 18.77	8 6.16 17.92	13 2.69 8.57 j	2 -4.00 8.49	4 3.75 7.50	4 8.75 14.36	14 4.71 6.52 j	4 3.75 4.79	14 5.60 17.67	3 18.33 16.07 cgk	11 3.18 7.78 j	5 7.00 8.37	31 6.42 19.44	3 13.33 10.41	10 5.33 14.48
New product introductions	20 6.25 6.86 k	8 3.38 6.95	13 10.58 14.75	2 2.50 3.54	3 5.00 8.66	4 7.50 9.57	14 5.94 11.46	5 1.00 6.52	14 7.60 11.09	2 0.00 0.00	11 1.36 3.23 aN	5 -0.83 11.05	32 7.48 10.60	3 11.67 7.64 K	10 3.50 7.47
Customer relationship management	18 2.92 4.56 J	7 4.29 6.07	12 0.71 7.93 j	2 0.00 0.00	5 3.40 6.54	4 0.00 0.00	14 3.79 5.52 j	4 3.75 2.50	14 7.37 11.68	3 13.18 10.15 Acgk	11 2.91 5.99 j	5 3.00 4.47	30 3.09 9.45	3 -2.17 13.39	10 4.50 5.99
New service introductions	18 0.83 4.29 gJln	7 4.44 7.70	12 1.75 6.08	2 2.50 3.54	4 5.00 5.77 k	4 1.25 2.50	13 4.00 3.92 ajk	4 2.50 2.89	13 5.38 8.77	2 12.50 10.61 AgKo	11 0.55 1.51 egJLn	5 6.00 4.18 aK	30 3.59 7.56	3 8.33 10.41 ak	10 1.50 4.74 j
Customer experience spending	18 1.99 6.54	8 4.50 7.21	12 0.42 4.50 hl	2 5.00 7.07	5 0.20 0.45 HI	4 3.75 4.79	13 1.91 9.12	4 6.25 2.50 cEk	13 4.00 6.43	2 8.50 9.19	11 1.64 3.23 hl	5 8.00 5.70 cek	31 3.26 8.50	3 0.30 12.73	10 4.56 6.59
Traditional advertising spending	19 -0.90 16.19 n	8 0.00 2.67 JN	13 -7.31 11.66 fn	2 -2.00 7.07	4 0.00 0.00	4 7.50 9.57	14 -0.93 5.23 cgjkN	5 -7.83 18.88 fJN	14 2.35 16.42 n	2 -15.00 7.07 BfGK	11 -0.27 3.58 fJN	5 1.00 10.25 n	30 0.44 13.79 N aBcFGiKIM	3 -26.38 12.13	10 -1.70 19.45

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

Topic 6: Marketing Spending

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

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	21 10.45 11.53	16 9.71 13.71	17 10.13 21.11	34 12.65 15.62	16 14.76 18.84	32 10.07 11.97	16 2.84 13.56	24 10.70 14.37	19 13.72 14.77	29 12.21 16.86	17 12.93 17.89	20 11.49 16.18	16 4.50 6.61	4 23.09 18.13	25 4.62 12.79
				g	g		de		fh				bG	Fh	bg
Overall marketing spending	21 13.78 13.50	16 14.02 12.64	17 3.49 17.98	36 7.26 18.16	16 6.91 19.54	31 7.62 13.34	15 -0.60 8.87	24 13.69 16.03	19 9.74 9.61	30 6.79 16.24	18 10.75 19.71	20 8.48 17.52	15 0.04 14.79	4 18.57 22.91	24 0.71 8.95
		G	G			g	ABf	fh	fh		h		ab	H	ABdG
Brand building	21 7.90 10.99	14 9.38 12.97	14 -4.20 13.00	34 8.80 18.83	15 4.33 12.23	31 5.96 16.61	15 3.93 5.61	24 9.68 12.97	17 4.65 7.39	26 4.45 19.56	17 8.09 17.50	18 5.98 18.10	16 4.69 11.29	4 17.82 19.98	24 1.59 9.32
		C	c	Abdfg	c	c	c	h	g					bh	ag
New product introductions	21 7.49 10.35	15 9.47 7.84	13 5.95 12.12	33 5.21 7.62	16 7.04 12.91	32 3.94 9.72	14 4.06 9.60	24 8.85 10.04	17 8.08 10.19	26 5.25 8.70	16 7.50 9.49	20 3.16 10.04	16 0.93 6.89	4 11.84 15.41	23 5.34 9.89
								F	f		f		Abdg	f	
Customer relationship management	21 5.96 8.76	14 7.50 7.27	15 -1.17 7.96	34 3.94 7.18	15 2.30 7.19	29 3.35 7.11	12 1.54 7.43	24 4.75 8.62	17 5.47 8.39	27 2.41 7.96	17 5.24 8.05	18 2.22 5.48	14 0.36 4.58	4 9.89 10.59	21 2.43 7.58
		c	C	aBd	c						g	g		ef	
New service introductions	21 4.15 8.24	14 4.29 6.16	14 0.47 5.39	31 2.45 4.94	15 2.40 5.86	29 4.21 7.10	12 3.33 3.75	24 4.04 7.88	17 4.12 5.93	26 1.64 5.76	14 4.36 6.37	18 1.94 4.89	14 2.86 6.11	4 5.26 10.52	21 3.38 5.14
Customer experience spending	21 4.67 6.62	14 5.75 7.64	15 -0.48 8.22	31 4.29 6.27	15 0.00 3.27	30 4.04 6.14	13 -0.64 8.37	24 4.92 6.61	17 4.12 6.90	27 0.94 7.73	14 5.04 6.00	19 3.03 5.90	15 2.07 3.65	4 5.14 10.28	21 1.63 8.28
		ceg	ceg	abdf	ceg	abdf	ceg	abdf							
Traditional advertising spending	21 3.15 14.66	15 1.67 3.09	14 -8.15 11.85	33 -1.53 15.15	15 -0.14 16.39	29 -3.14 14.39	15 -3.33 7.89	24 1.00 12.13	18 -0.44 10.84	26 -1.39 16.39	16 -3.02 14.99	18 -3.77 13.92	15 -3.89 15.21	4 5.53 22.21	23 -1.91 7.83
		c	Cg	aB			b								

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

 **Topic 6: Marketing Spending**

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	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
...of your marketing budget do you currently spend on social media?	163 14.25 12.50	62 9.50 12.50 BCd	44 15.65 14.02 A	39 19.31 12.82 A	18 16.24 12.40 a	59 12.64 10.93	50 15.04 12.37	31 15.06 12.82	14 19.05 16.67	6 13.06 17.16	69 12.77 9.69	94 15.33 14.17
...will you spend in the next 12 months?	163 17.06 13.30	62 11.69 10.61 BCd	44 19.22 14.30 A	39 22.52 13.46 A	18 18.40 13.12 a	59 15.12 11.84 d	50 17.66 13.33	31 18.16 12.36	14 23.74 17.65 a	6 16.03 18.72	69 15.12 10.90	94 18.48 14.71
...do you predict you will spend in five years?	161 23.06 15.70	61 17.44 13.80 bC	43 24.45 15.99 a	39 29.43 15.63 A	18 24.96 15.97	58 21.38 14.48 d	50 23.87 15.49	31 23.04 14.72	14 30.99 20.26 a	6 19.05 20.96	67 22.26 14.61	94 23.63 16.49

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

Topic 6: Marketing Spending

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?	23 10.54 9.25 CDO	8 17.80 17.87	16 20.34 11.67 Afhil	3 26.67 2.89 AFHL	5 10.20 11.52	4 6.00 4.69 cD	17 14.71 10.65	7 8.14 5.98 cDo	15 9.65 16.43 c	3 20.67 19.01	11 12.67 14.08	5 9.00 4.18 cD	32 14.37 11.22	4 17.50 9.57	10 22.98 15.94 Ah
...will you spend in the next 12 months?	23 15.23 10.39 cdo	8 23.77 18.31	16 22.81 12.64 afh	3 30.00 5.00 aFgHI	5 13.20 16.99	4 6.25 4.35 cDno	17 16.82 10.20 d	7 10.14 6.77 cDo	15 13.07 17.44	3 21.67 16.07	11 14.73 14.72	5 12.00 7.58 d	32 16.20 12.50	4 18.75 8.54 f	10 26.04 16.41 afh
...do you predict you will spend in five years?	23 22.53 12.37 f	8 31.07 21.86	16 29.75 15.27 fg	3 36.67 12.58 Fgl	5 15.20 18.51	4 8.25 5.38 acDgJNo	17 20.35 9.47 cdfn	6 18.83 11.05	15 20.84 22.53	3 31.67 16.07 f	11 19.09 14.29	5 16.00 6.52 dn	31 20.91 15.10	4 33.75 12.50 Fgl	10 31.06 18.61 f

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

 **Topic 6: Marketing Spending**

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 15.50 17.82	15 14.29 12.13	19 17.79 11.31	36 13.31 13.15	17 10.96 12.44	35 14.47 10.15	16 12.31 7.94	26 18.61 17.72	18 12.22 9.43	33 14.55 12.97	18 10.89 11.44	20 14.27 11.93	16 13.40 13.14	5 18.20 9.96	27 13.04 8.22
...will you spend in the next 12 months?	23 19.20 17.22	15 17.68 12.97	19 22.47 13.99	36 16.23 14.14	17 11.59 10.86	35 17.12 11.68	16 13.81 8.15	26 21.22 17.27	18 15.83 10.47	33 19.04 14.86	18 12.78 12.03	20 15.20 10.51	16 15.76 15.14	5 22.40 12.10	27 15.44 9.70
...do you predict you will spend in five years?	23 27.25 18.99 e	15 19.47 12.93	19 27.28 15.83 e	35 22.80 17.62	17 16.00 14.34 ac	35 23.84 14.69	15 21.40 10.63	26 26.99 17.61	18 23.61 16.79	33 23.27 16.56	17 17.76 14.70	20 22.65 14.39	16 21.35 18.40	5 26.00 15.57	26 22.73 12.19

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



Topic 6: Marketing Spending

How do your company’s budgets for customer acquisition and customer retention compare?*

	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	162	63	44	38	17	59	50	31	14	6	69	93
Mean	-25.96	-24.92	-18.41	-34.34	-30.59	-23.73	-25.60	-24.03	-27.14	-46.67	-25.65	-26.18
SD	36.64	38.47	35.95	36.73	28.83	33.52	36.65	41.48	43.22	27.33	39.43	34.65
Median	-30.00	-25.00	-20.00	-40.00	-30.00	-20.00	-30.00	-35.00	-30.00	-50.00	-30.00	-30.00

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

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

 **Topic 6: Marketing Spending**

How do your company’s budgets for customer acquisition and customer retention compare?*

	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	8	15	3	5	4	16	6	14	3	11	5	34	5	10
Mean	-30.43	2.50	-41.00	-30.00	-22.00	-17.50	-19.38	-18.33	-20.71	-16.67	-17.27	-18.00	-39.12	-4.00	-25.00
SD	35.74	33.27	24.80	17.32	45.50	67.02	36.05	28.58	38.12	75.72	44.29	26.83	28.22	33.62	47.43
Median	-35.00	20.00	-35.00	-20.00	0.00	0.00	-20.00	-20.00	0.00	10.00	-25.00	0.00	-40.00	5.00	-20.00
	b	aCM	Bn				m						Bgn	cm	

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

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

 **Topic 6: Marketing Spending**

How do your company’s budgets for customer acquisition and customer retention compare?*

	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	22	16	17	36	17	37	15	25	19	30	20	20	16	5	27
Mean	-13.64	-23.75	-28.24	-35.28	-24.41	-25.41	-23.33	-22.00	-24.74	-33.17	-29.50	-20.00	-10.00	-34.00	-32.22
SD	35.13	35.19	36.95	35.33	40.69	40.11	29.68	31.75	34.70	36.78	38.73	45.19	42.11	49.30	27.08
Median	-20.00	-20.00	-35.00	-40.00	-25.00	-30.00	-20.00	-20.00	-25.00	-40.00	-30.00	0.00	0.00	-45.00	-30.00
	d			a									h		f

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

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



Topic 6: Marketing Spending

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

	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	156	62	42	38	14	58	51	27	13	5	66	90
Mean	-6.28	-26.69	-5.95	27.11	-7.50	-23.62	4.12	5.56	3.08	20.00	-19.92	3.72
SD	48.58	38.78	49.33	46.67	44.23	46.73	44.18	52.35	49.39	40.62	46.50	47.87
Median	-10.00	-30.00	0.00	40.00	0.00	-30.00	-2.50	20.00	10.00	30.00	-30.00	0.00
		bc	aC	ABd	c	Bcc	A	a		a	B	A

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

*Positive (negative) numbers mean that the marketing (R&D) budget is x% larger than the R&D (marketing) budget.

 **Topic 6: Marketing Spending**

Compared to your company's R&D budget, what is the size of your company's marketing 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	22	8	16	3	5	4	14	5	15	1	11	4	34	5	9
Mean	-7.27	28.75	35.63	3.33	-10.00	-40.00	-28.21	-6.00	-8.67	-10.00	9.09	22.50	-39.85	-29.00	50.56
SD	49.78	45.49	43.96	15.28	61.24	47.61	39.79	43.93	40.33	---	51.08	33.04	27.43	48.79	30.87
Median	0.00	60.00	50.00	10.00	0.00	-50.00	-20.00	5.00	-5.00	-40.00	35.00	20.00	-50.00	-27.50	70.00
	CMO	fGM	AFGIMn	mo	o	bCO	BCIO	mo	CMO		Mo	gM	ABCdhIKL	O	cOAdeFGHkM
															N

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

*Positive (negative) numbers mean that the marketing (R&D) budget is x% larger than the R&D (marketing) budget.



Topic 6: Marketing Spending

Compared to your company's R&D budget, what is the size of your company's marketing 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	22	16	17	35	16	35	14	25	19	31	17	17	16	5	26
Mean	18.64	-12.81	-0.59	-13.57	6.25	-12.14	-21.79	18.80	1.84	-12.10	-28.24	-2.35	-4.38	6.00	-21.15
SD	44.65	40.91	58.04	51.70	47.03	47.14	36.56	44.09	52.31	48.16	51.87	49.06	49.80	51.28	38.94
Median	30.00	-20.00	10.00	-20.00	0.00	-10.00	-20.00	35.00	2.50	-15.00	-45.00	0.00	0.00	40.00	-30.00
	bdfG	a		a		a	A	cDH		a	A				A

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

*Positive (negative) numbers mean that the marketing (R&D) budget is x% larger than the R&D (marketing) budget.



Topic 6: Marketing Spending

When year-to-date profits are lower than expected, what percent of the time do company executives cut expenses versus work to grow 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	164	63	45	39	17	58	53	30	14	5	68	96
Mean	-18.11	-19.21	-22.00	-16.15	-8.24	-7.59	-31.70	-36.33	13.57	26.00	-22.94	-14.69
SD	54.88	57.03	52.34	56.55	52.82	55.20	55.22	49.79	38.75	52.73	58.26	52.39
Median	-20.00	0.00	-25.00	-10.00	-15.00	0.00	-30.00	-50.00	0.00	35.00	-20.00	-10.00
						bc	aDe	aDe	BC	bc		

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

*Positive (negative) numbers mean that the growing revenues (cutting expenses) is the percentage x% of the time.

 **Topic 6: Marketing Spending**

When year-to-date profits are lower than expected, what percent of the time do company executives cut expenses versus work to grow 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	23	8	15	3	5	4	17	7	15	3	11	4	33	5	11
Mean	-6.52	-6.25	-49.33	-10.00	6.00	20.00	-44.71	-4.29	-34.00	13.33	-12.73	-27.50	-2.12	-50.00	-25.45
SD	56.70	55.53	35.15	34.64	78.61	84.46	40.79	27.60	58.04	55.08	55.87	34.03	55.78	23.45	70.19
Median	0.00	0.00	-45.00	0.00	35.00	70.00	-45.00	0.00	-25.00	40.00	0.00	0.00	0.00	-45.00	-10.00
	cg	c	abefHjM		c	cg	afhjM	Cgn		cg			CG	h	

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

*Positive (negative) numbers mean that the growing revenues (cutting expenses) is the percentage x% of the time.

 **Topic 6: Marketing Spending**

When year-to-date profits are lower than expected, what percent of the time do company executives cut expenses versus work to grow 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	22	17	18	37	17	35	16	25	20	32	20	19	16	4	28
Mean	-7.27	17.06	-26.11	-14.86	-43.53	-20.00	-40.00	-4.00	5.50	-14.38	-23.00	-24.21	-36.88	17.50	-38.57
SD	47.63	50.34	57.51	63.49	41.22	51.34	51.64	46.28	67.86	54.12	48.02	61.58	50.69	46.46	48.66
Median	0.00	0.00	-20.00	-5.00	-30.00	-30.00	-50.00	0.00	0.00	0.00	0.00	-20.00	-30.00	50.00	-30.00
	e	cEfG	b		aB	b	B	fh	fh				ab	h	abg

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



Topic 6: Marketing Spending

When year-to-date profits are lower than expected and the focus is on cutting expenses, how often do company executives cut marketing expenses over other areas? (% of the time cut 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
N	160	61	43	39	17	58	52	30	12	5	66	94
Mean	45.42	49.87	48.72	42.05	28.82	44.66	48.98	51.33	17.08	25.00	49.05	42.87
SD	37.21	39.26	37.86	33.26	34.12	39.91	35.27	38.55	17.38	11.18	36.90	37.41
Median	50.00	50.00	50.00	45.00	15.00	50.00	50.00	50.00	10.00	27.50	50.00	40.00
		d			a	d	D	D	aBC			

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

 **Topic 6: Marketing Spending**

When year-to-date profits are lower than expected and the focus is on cutting expenses, how often do company executives cut marketing expenses over other areas? (% of the time cut 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
N	23	8	16	2	5	4	17	5	13	3	11	4	34	4	11
Mean	41.30	41.25	53.44	55.00	40.00	23.75	42.94	47.00	46.54	52.33	50.45	17.50	51.62	48.75	38.64
SD	34.48	41.21	33.05	63.64	46.90	47.50	31.92	34.02	39.60	43.66	45.41	22.17	37.91	53.60	38.86
Median	45.00	50.00	50.00	1.00	50.00	0.00	50.00	70.00	50.00	77.50	77.50	10.00	50.00	90.00	35.00

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

 **Topic 6: Marketing Spending**

When year-to-date profits are lower than expected and the focus is on cutting expenses, how often do company executives cut marketing expenses over other areas? (% of the time cut 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
N	21	16	18	36	16	36	15	24	20	30	18	21	16	5	26
Mean	32.38	35.00	50.56	49.17	55.31	44.22	57.67	35.42	37.50	42.83	54.44	45.33	42.50	37.00	60.96
SD	32.96	39.16	41.08	36.20	38.75	37.70	32.45	33.84	39.92	38.14	40.76	36.33	40.41	28.20	32.83
Median	27.50	20.00	50.00	50.00	70.00	50.00	50.00	30.00	25.00	30.00	80.00	50.00	50.00	37.50	70.00
	g						a	H	h						Ab

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



Topic 7: 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 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	170	66	46	39	18	63	52	31	14	6	71	99
Mean	2.49	-0.03	3.85	4.23	4.64	4.15	4.29	-1.10	-2.00	0.00	-0.44	4.59
SD	25.87	25.37	29.66	27.87	9.16	30.03	25.91	23.13	20.40	8.37	21.68	28.42

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



Topic 7: Marketing Jobs

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

	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	23	9	15	3	5	4	18	7	17	3	12	5	34	3	11
Mean	-3.13	-13.67	3.73	0.00	-2.00	0.00	7.20	17.57	6.76	20.00	15.83	0.00	-1.82	-11.00	4.55
SD	27.53	21.96	31.97	5.00	12.55	16.33	26.36	36.67	16.20	26.46	29.76	7.07	21.57	19.05	39.26
		ik							b		bm		k		

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



Topic 7: 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
N	23	17	20	36	17	36	18	26	20	33	19	22	15	6	29
Mean	14.00	11.47	-3.45	-1.44	5.47	2.17	-2.69	13.35	12.25	-6.24	-2.00	6.50	-3.33	0.83	-0.77
SD	40.09	28.87	20.66	25.65	26.90	9.20	10.48	38.08	26.23	26.75	28.86	23.90	10.47	9.70	10.00
								c	cfh	ab			b		b

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



Topic 7: Marketing Jobs

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

	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	168	66	44	39	18	62	52	31	14	6	70	98
Mean	2.64	1.96	4.26	2.54	1.56	3.54	0.98	2.83	1.93	8.98	2.40	2.82
SD	9.08	10.04	10.34	7.55	4.05	9.98	7.72 e	8.93	9.31	11.63 b	9.26	8.99

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

 **Topic 7: Marketing Jobs**

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

	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	23	9	15	3	5	4	18	6	17	3	11	5	34	3	11
Mean	4.52	-1.00	3.60	-2.67	4.78	1.25	0.67	4.98	1.47	9.63	6.54	2.00	3.20	0.00	-1.10
SD	7.20	8.23	7.05	6.43	18.35	2.50	4.45	11.73	8.25	16.69	11.46	4.47	11.54	0.00	7.25
		o					j				g				a

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

 **Topic 7: Marketing Jobs**

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

	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	17	19	36	17	36	17	26	20	33	19	21	15	6	28
Mean	7.16	6.74	-1.53	2.50	3.17	1.53	-0.29	6.34	4.98	2.30	2.42	3.90	-0.60	3.33	-1.25
SD	10.98	13.40	10.02	4.23	10.29	8.22	5.31	10.65	14.46	5.59	4.50	9.95	8.22	10.80	6.08
	cdfg	c	abd	acg		a	ad	fH	h	h	h	h	h	a	Abcde

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



Topic 7: Marketing Jobs

What percent of your marketing budget is currently devoted to training and development?

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number		B2B Product	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
Mean		A	B	C	D	A	B	C	D	E	A	B
SD												
N	161	63	43	36	18	61	49	29	13	6	65	96
Mean	3.80	3.48	4.21	3.96	3.86	4.08	3.71	2.55	5.83	3.17	3.43	4.06
SD	3.77	3.53	3.88	3.96	4.18	3.84	3.77	2.76	4.71	3.76	3.60	3.88
								D	C			

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

 **Topic 7: Marketing Jobs**

What percent of your marketing budget is currently devoted to training and development?

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	23	8	15	3	5	4	17	6	14	3	11	5	34	2	10
Mean	4.89	3.92	1.87	6.67	1.20	5.50	3.76	5.83	4.96	0.33	2.27	4.20	3.10	7.69	5.64
SD	3.53	4.83	2.17	2.89	2.17	5.26	3.47	3.76	4.71	0.58	3.44	3.96	3.15	6.63	4.66
	Cejkm		ADfHino	Cej	adh	c		Cej	c	adh	a		a	c	c

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

 **Topic 7: Marketing Jobs**

What percent of your marketing budget is currently devoted to training and development?

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	23	16	19	34	16	35	15	26	19	32	18	20	15	5	26
Mean	4.60	3.77	2.74	3.59	2.00	4.81	4.13	4.74	3.21	3.69	2.50	3.00	3.26	5.20	5.01
SD	4.63	3.07	3.72	3.53	2.31	4.06	3.46	4.65	3.26	3.60	2.87	3.20	4.26	3.19	3.94
	e				af	e					h				d

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



Topic 8: Marketing Channels

Will you use a channel or go directly to market?

N=308

	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
Uses channel partners	214 69.5%	87 71.9%	46 59.0% c	56 77.8% b	24 68.6%	73 60.8% bC	63 74.1% a	41 82.0% Ad	13 56.5% c	8 66.7%	86 73.5%	127 67.2%
Does not use channel partners	94 30.5%	34 28.1%	32 41.0% c	16 22.2% b	11 31.4%	47 39.2% bC	22 25.9% a	9 18.0% Ad	10 43.5% c	4 33.3%	31 26.5%	62 32.8%

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

 **Topic 8: Marketing Channels**

Will you use a channel or go directly to market?

N=308

	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	26 70.3% L	8 61.5% i	24 85.7% jkL	5 55.6% i	4 57.1% i	5 55.6% i	24 75.0% jL	11 73.3% l	26 89.7% bdefJKLo	1 25.0% cglm	13 56.5% cl	1 14.3% ACGhIMno	45 72.6% jL	7 70.0% 1	12 63.2% il
Does not use channel partners	11 29.7% L	5 38.5% i	4 14.3% jkL	4 44.4% i	3 42.9% i	4 44.4% i	8 25.0% jL	4 26.7% l	3 10.3% bdefJKLo	3 75.0% cglm	10 43.5% cl	6 85.7% ACGhIMno	17 27.4% jL	3 30.0% 1	7 36.8% il

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



Topic 8: Marketing Channels

Will you use a channel or go directly to market?

N=308

	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
Uses channel partners	25 64.1% G	12 50.0% G	23 69.7% g	44 72.1% g	17 73.9% g	48 62.3% G	39 92.9% ABcdeF	28 63.6% h	16 59.3% h	39 69.6%	22 71.0%	23 59.0% h	21 72.4%	14 70.0%	50 82.0% abe
Does not use channel partners	14 35.9% G	12 50.0% G	10 30.3% g	17 27.9% g	6 26.1% g	29 37.7% G	3 7.1% ABcdeF	16 36.4% h	11 40.7% h	17 30.4%	9 29.0%	16 41.0% h	8 27.6%	6 30.0%	11 18.0% abe

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

 **Topic 8: Marketing Channels**

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

	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
We increased the number of channels we use	95 57.6%	43 68.3% b	17 44.7% a	21 50.0%	14 63.6%	30 61.2%	32 57.1%	20 55.6%	7 70.0%	3 37.5%	43 61.4%	52 54.7%
We are opening new digital channels	79 47.9%	28 44.4%	14 36.8%	24 57.1%	13 59.1%	12 24.5% BCe	36 64.3% A	19 52.8% A	4 40.0%	5 62.5% a	30 42.9%	49 51.6%
We are using our social channels to sell more of our products and services	64 38.8%	15 23.8% cD	16 42.1%	18 42.9% a	15 68.2% A	13 26.5% e	23 41.1%	16 44.4%	5 50.0%	5 62.5% a	23 32.9%	41 43.2%
We are opening new face-to-face channels	50 30.3%	21 33.3% c	18 47.4% C	6 14.3% aB	5 22.7%	22 44.9% B	9 16.1% A	12 33.3%	3 30.0%	1 12.5%	24 34.3%	26 27.4%
We are using more retail media (brand advertising on online retail sites) to sell our products and services	39 23.6%	6 9.5% CD	2 5.3% CD	23 54.8% AB	8 36.4% AB	4 8.2% BC	16 28.6% A	14 38.9% A	3 30.0%	1 12.5%	11 15.7% b	28 29.5% a
We added a direct-to-consumer/customer channel of any type	33 20.0%	11 17.5%	6 15.8%	12 28.6%	4 18.2%	6 12.2% b	16 28.6% a	5 13.9%	3 30.0%	3 37.5%	16 22.9%	17 17.9%
We decreased the number of channels we use	11 6.7%	4 6.3%	3 7.9%	3 7.1%	1 4.5%	3 6.1%	4 7.1%	4 11.1%	0 0.0%	0 0.0%	6 8.6%	5 5.3%
Our former face-to-face channels have all become digital	7 4.2%	2 3.2%	2 5.3%	2 4.8%	1 4.5%	0 0.0% De	2 3.6% d	2 5.6%	2 20.0% Ab	1 12.5% a	1 1.4%	6 6.3%

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

Topic 8: Marketing Channels

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

N=165

	Total	Industry Sector														
		Banking Finance Insurance A	Communi- cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthca- re 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
We increased the number of channels we use	95 57.6%	9 47.4%	4 57.1%	9 47.4%	3 60.0%	1 25.0%	2 66.7%	15 75.0% k	5 62.5%	11 52.4%	0 0.0%	4 36.4% g	1 100.0%	23 69.7%	3 75.0%	4 44.4%
We are opening new digital channels	79 47.9%	9 47.4% g	1 14.3% G	9 47.4% g	2 40.0%	1 25.0% g	1 33.3%	16 80.0% aBckM	4 50.0%	12 57.1% m	0 0.0%	4 36.4% g	1 100.0%	9 27.3% Gio	3 75.0%	6 66.7% m
We are using our social channels to sell more of our products and services	64 38.8%	9 47.4%	3 42.9%	6 31.6% g	3 60.0%	3 75.0% i	1 33.3%	13 65.0% chIM	1 12.5% go	4 19.0% eGno	0 0.0%	3 27.3%	0 0.0%	9 27.3% Go	3 75.0% i	6 66.7% him
We are opening new face-to-face channels	50 30.3%	7 36.8%	2 28.6%	2 10.5% kN	1 20.0%	2 50.0%	1 33.3%	3 15.0% kn	3 37.5%	7 33.3%	0 0.0%	6 54.5% cg	0 0.0%	10 30.3%	3 75.0% Cg	3 33.3%
We are using more retail media (brand advertising on online retail sites) to sell our products and services	39 23.6%	4 21.1% Cn	3 42.9% km	13 68.4% AefGHIK M	1 20.0%	0 0.0%	0 0.0%	3 15.0% Cno	0 0.0%	3 14.3% Cno	0 0.0%	0 0.0%	0 0.0%	3 9.1% bcNO	3 75.0% aghiKM	5 55.6% ghikM
We added a direct-to-consumer/customer channel of any type	33 20.0%	4 21.1%	0 0.0%	3 15.8%	2 40.0%	1 25.0%	0 0.0%	8 40.0% M	2 25.0%	5 23.8%	0 0.0%	1 9.1%	0 0.0%	3 9.1% G	1 25.0%	2 22.2%
We decreased the number of channels we use	11 6.7%	1 5.3% e	1 14.3%	2 10.5%	0 0.0%	2 50.0% agikmo	0 0.0%	1 5.0% e	0 0.0%	1 4.8% e	0 0.0%	0 0.0% e	0 0.0%	3 9.1% e	0 0.0%	0 0.0% e
Our former face-to-face channels have all become digital	7 4.2%	2 10.5%	1 14.3%	0 0.0% e	1 20.0%	1 25.0% cg	0 0.0%	0 0.0% e	0 0.0%	1 4.8%	0 0.0%	0 0.0%	0 0.0%	1 3.0%	0 0.0%	0 0.0%

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

 **Topic 8: Marketing Channels**

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

	Total	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
We increased the number of channels we use	95 57.6%	11 50.0%	7 70.0%	10 58.8%	22 64.7%	10 71.4%	18 52.9%	16 50.0%	12 48.0%	10 66.7%	16 61.5%	11 64.7%	9 60.0%	9 60.0%	6 50.0%	22 55.0%
We are opening new digital channels	79 47.9%	7 31.8% eG	1 10.0% EfG	7 41.2% g	14 41.2% g	10 71.4% aB	16 47.1% bg	23 71.9% ABcdf	8 32.0% H	5 33.3% h	12 46.2%	7 41.2% h	6 40.0% h	7 46.7%	6 50.0%	28 70.0% Abde
We are using our social channels to sell more of our products and services	64 38.8%	10 45.5%	2 20.0%	5 29.4%	13 38.2%	3 21.4%	16 47.1%	14 43.8%	8 32.0%	7 46.7%	9 34.6%	7 41.2%	3 20.0%	7 46.7%	5 41.7%	18 45.0%
We are opening new face-to-face channels	50 30.3%	10 45.5% g	3 30.0%	6 35.3%	10 29.4%	6 42.9%	9 26.5%	5 15.6% a	10 40.0% H	4 26.7%	9 34.6% h	7 41.2% H	5 33.3% h	6 40.0% h	5 41.7% h	4 10.0% AcDefg
We are using more retail media (brand advertising on online retail sites) to sell our products and services	39 23.6%	5 22.7%	2 20.0%	1 5.9% f	7 20.6%	3 21.4%	11 32.4% c	9 28.1%	6 24.0%	3 20.0%	7 26.9%	1 5.9% gh	3 20.0%	1 6.7% g	5 41.7% df	13 32.5% d
We added a direct-to-consumer/customer channel of any type	33 20.0%	4 18.2%	1 10.0%	3 17.6%	8 23.5%	3 21.4%	5 14.7%	9 28.1%	5 20.0%	4 26.7%	2 7.7%	2 11.8%	3 20.0%	3 20.0%	3 25.0%	11 27.5%
We decreased the number of channels we use	11 6.7%	0 0.0%	1 10.0%	2 11.8%	3 8.8%	1 7.1%	2 5.9%	2 6.3%	1 4.0%	2 13.3%	1 3.8%	1 5.9%	2 13.3%	1 6.7%	1 8.3%	2 5.0%
Our former face-to-face channels have all become digital	7 4.2%	2 9.1%	0 0.0%	2 11.8%	2 5.9%	0 0.0%	1 2.9%	0 0.0%	1 4.0%	3 20.0% ch	0 0.0% b	1 5.9%	1 6.7%	0 0.0%	0 0.0%	1 2.5% b

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



What percent of your sales occur online? Average levels

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
N	290	115	72	68	34	120	85	50	23	12	108	181
Mean	13.26	9.41	7.90	21.71	21.08	0.00	4.80	23.68	62.16	68.56	8.59	15.84
SD	21.16	18.61	16.15	23.17	27.30	0.00	3.32	7.26	8.57	0.00	15.42	23.46
		CD	CD	AB	AB		CDE	BDE	BCe	BCd	B	A

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

 **Topic 8: Marketing Channels**

What percent of your 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	35	12	26	9	7	8	30	14	28	4	22	6	59	9	18
Mean	17.03	28.94	14.58	30.29	28.16	8.13	9.34	5.07	11.00	5.00	6.91	22.85	9.27	21.06	15.42
SD	25.46	31.07	15.43	30.96	29.01	17.72	20.03	10.71	18.65	7.07	12.29	35.40	18.60	22.52	19.66
		ghiKM	h	ghiKM	ghKm		bde	bcden	bd		BDEn		BDe	hk	

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

 **Topic 8: Marketing Channels**

What percent of your 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	39	24	30	61	22	73	36	43	27	53	30	36	29	20	52
Mean	18.75	11.42	13.17	11.02	9.73	13.44	15.32	18.83	11.69	13.82	10.32	7.81	10.31	19.94	13.43
SD	26.15	21.74	21.90	20.87	17.35	20.62	19.10	26.46 e	19.26	23.35	21.66	13.92 ag	20.05	22.77 e	18.08

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



Topic 8: Marketing Channels

What percent of your sales occur online? Quintiles

	Total	Primary Economic Sector				Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	Yes A	No B
0%	120 41.4%	57 49.6% C	43 59.7% CD	8 11.8% ABd	11 32.4% Bc	45 41.7%	75 41.4%
1-10%	85 29.3%	35 30.4%	13 18.1% C	28 41.2% B	9 26.5%	42 38.9% B	43 23.8% A
11-49%	50 17.2%	14 12.2% c	12 16.7%	18 26.5% a	6 17.6%	16 14.8%	34 18.8%
50-99%	23 7.9%	6 5.2% c	2 2.8% C	11 16.2% aB	4 11.8%	4 3.7%	18 9.9%
100%	12 4.1%	3 2.6% d	2 2.8%	3 4.4%	4 11.8% a	1 0.9% b	11 6.1% a

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

 **Topic 8: Marketing Channels**

What percent of your sales occur online? Quintiles

	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
0%	15 42.9% Co	3 25.0% fm	1 3.8% AFGHIJKL M	2 22.2% f	2 28.6%	6 75.0% bCdinO	15 50.0% CO	8 57.1% CO	9 32.1% Cfm	2 50.0% C	13 59.1% CO	4 66.7% Co	34 57.6% bCiO	2 22.2% f	2 11.1% aFGHKIM
1-10%	8 22.9% co	3 25.0%	14 53.8% aefklMn	2 22.2%	0 0.0% cio	0 0.0% cio	10 33.3%	5 35.7%	12 42.9% efm	1 25.0%	5 22.7% co	0 0.0% co	13 22.0% CiO	1 11.1% co	10 55.6% aefklMn
11-49%	5 14.3% cn	2 16.7%	10 38.5% aGhM	1 11.1%	3 42.9% gm	1 12.5%	2 6.7% CeN	1 7.1% cn	5 17.9% n	1 25.0%	3 13.6% n	0 0.0% n	7 11.9% CeN	5 55.6% aGhiklM	4 22.2%
50-99%	3 8.6%	3 25.0% m	1 3.8% d	3 33.3% chkM	0 0.0%	1 12.5%	3 10.0%	0 0.0% d	2 7.1%	0 0.0%	1 4.5% d	0 0.0%	3 5.1% bD	1 11.1%	2 11.1%
100%	4 11.4%	1 8.3%	0 0.0% EL	1 11.1%	2 28.6% CGHlkmO	0 0.0%	0 0.0% EL	0 0.0% el	0 0.0% EL	0 0.0%	0 0.0% eL	2 33.3% CGhIKMo	2 3.4% eL	0 0.0%	0 0.0% el

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

 **Topic 8: Marketing Channels**

What percent of your sales occur online? Quintiles

	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
0%	20 51.3% G	16 66.7% eFG	15 50.0% G	29 47.5% G	7 31.8% b	25 34.2% Bg	4 11.1% ABCDF	22 51.2% GH	13 48.1% GH	26 49.1% GH	18 60.0% GH	17 47.2% GH	12 41.4% gh	2 10.0% ABCDEF	10 19.2% ABCDEF
1-10%	4 10.3% dEFG	2 8.3% dEFG	6 20.0% G	18 29.5% abg	10 45.5% AB	26 35.6% Ab	19 52.8% ABCd	5 11.6% FgH	6 22.2% h	12 22.6% H	6 20.0% H	10 27.8% h	12 41.4% A	8 40.0% a	26 50.0% AbCDe
11-49%	6 15.4%	3 12.5%	5 16.7%	8 13.1%	4 18.2%	13 17.8%	10 27.8%	6 14.0%	5 18.5%	7 13.2%	3 10.0% g	8 22.2% g	2 6.9% g	7 35.0% cdf	12 23.1%
50-99%	6 15.4%	3 12.5%	3 10.0%	3 4.9%	0 0.0%	7 9.6%	1 2.8%	7 16.3% e	2 7.4%	4 7.5%	2 6.7%	0 0.0% a	3 10.3%	2 10.0%	3 5.8%
100%	3 7.7%	0 0.0%	1 3.3%	3 4.9%	1 4.5%	2 2.7%	2 5.6%	3 7.0%	1 3.7%	4 7.5%	1 3.3%	1 2.8%	0 0.0%	1 5.0%	1 1.9%

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



Topic 9: 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	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 Revenue	158	58	44	38	18	58	50	29	12	6	64	94
	8.80	11.34	8.11	5.18	9.94	12.98	7.68	2.17	7.92	14.67	8.41	9.07
	20.48	20.48	24.90	18.61	9.55	24.24	14.73	22.01	19.84	15.12	23.24	18.50
						c		a				
Profits	155	57	42	38	18	58	49	29	12	5	63	92
	6.92	5.51	9.40	3.66	12.44	9.71	4.45	6.93	1.42	13.60	6.21	7.40
	17.97	15.27	21.19	14.70	22.97	17.53	15.05	23.60	15.59	20.67	15.02	19.81
Customer Acquisition	154	56	44	35	19	58	49	27	12	6	63	91
	7.36	8.13	10.16	2.63	7.32	9.34	4.49	4.56	9.42	20.83	7.43	7.31
	15.17	14.59	18.64	12.48	10.87	15.77	10.19	16.63	16.93	27.13	14.78	15.52
			c	b			E			B		
Customer Retention	154	57	44	35	18	58	48	27	12	6	64	90
	12.84	13.12	17.95	5.34	14.06	16.66	10.73	10.74	13.75	5.33	11.36	13.90
	27.70	27.97	32.34	20.95	24.84	30.34	26.65	26.43	32.00	7.39	26.99	28.29
			c	b								
Brand Value	155	57	44	35	19	57	49	28	12	6	65	90
	9.96	8.61	12.73	7.49	12.16	11.56	5.94	7.71	19.83	20.83	6.85	12.21
	19.01	16.10	21.87	20.86	16.73	19.88	14.54	17.86	29.64	20.10	13.36	22.02
						De		b		b		

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

 **Topic 9: 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
Sales Revenue	23 17.13 17.81 CI	9 5.33 24.28	15 -1.13 15.27 Agj	3 1.67 6.11	5 0.00 20.00	4 11.25 6.29	17 12.65 18.74 ci	6 4.83 4.88	14 -1.50 11.94 Agjm	3 29.33 39.70 ci	11 11.55 23.19	5 3.80 3.56	29 13.45 26.17 i	3 4.33 5.13	11 5.09 24.13
Profits	21 11.19 14.64 cl	9 10.00 25.88	15 -2.87 16.47 ag	3 6.00 4.58	5 8.00 22.80	4 11.75 12.20 i	17 11.65 22.73 ci	5 3.40 8.53	14 -1.86 8.08 Afgk	2 7.50 17.68	11 9.45 14.69 i	5 3.60 2.19	30 10.13 22.94	3 7.33 11.68	11 3.00 14.79
Customer Acquisition	23 13.30 21.66 o	9 5.67 10.38	13 -0.46 15.54 jm	3 4.33 1.15	5 13.00 13.04 o	4 11.25 6.29 ho	16 8.31 9.45 jo	6 2.50 5.39 f	14 2.43 10.96 j	2 39.00 50.91 cgimo	11 6.36 13.19	5 5.80 4.76	30 10.00 15.16 cjo	2 5.00 7.07	11 -0.91 8.86 aefgjm
Customer Retention	23 22.65 33.25 c	9 16.33 28.63	13 -1.38 13.16 ajkl	3 7.33 2.52 hn	5 -3.00 12.04	4 10.25 26.96	17 10.59 25.20	6 2.00 3.22 dn	14 14.21 29.03	2 40.00 49.50 c	11 28.27 37.21 c	5 21.00 31.14 c	30 11.57 27.54	2 -6.50 4.95 dh	10 5.90 24.56
Brand Value	22 17.09 26.72 c	9 17.78 28.95	13 -0.23 12.06 aglm	3 4.67 4.73	5 6.00 8.94	4 10.00 11.55	17 10.35 14.55 c	7 6.29 7.43	14 12.93 26.61	2 5.00 7.07	11 6.36 10.02	5 22.00 30.33 c	30 8.53 10.88 c	2 12.50 10.61	11 5.00 23.63

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

 **Topic 9: 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
Sales Revenue	23 11.52 29.15	17 16.88 26.80	19 4.53 17.64	30 8.93 24.20	16 3.00 11.85	35 6.89 9.83	16 6.31 7.29	26 9.23 25.42	20 11.80 18.30	32 11.16 31.39	13 16.15 20.01	19 0.84 10.55	16 8.44 8.86	5 13.60 17.67	27 4.78 5.28
Profits	22 7.77 20.59	17 10.00 25.00	19 -0.05 18.69	31 9.16 16.47	16 1.00 15.21	34 6.79 11.25	15 10.07 18.81	25 7.08 17.97	20 11.75 24.46	31 3.71 22.30	14 10.93 16.30	18 3.61 9.10	16 5.38 14.36	5 8.00 12.63	26 7.73 15.30
Customer Acquisition	21 4.10 16.67	17 8.76 13.81	18 5.17 15.31	31 11.55 19.59	15 5.47 9.90	33 5.52 10.01	17 6.35 7.25	25 5.32 16.19	20 8.95 13.61	30 12.13 22.04	14 10.07 19.06	17 3.12 7.44	17 3.88 7.70	5 7.40 14.36	26 6.15 9.92
Customer Retention	21 9.52 28.34	17 12.82 30.61	18 11.67 31.70	30 13.10 25.27	15 18.00 33.23	34 12.47 26.87	17 11.00 20.46	25 11.24 29.27	20 13.80 30.34	29 11.21 28.50	14 25.71 31.18	17 7.59 25.72	17 23.88 35.65	5 18.20 32.00	27 4.07 8.03
Brand Value	21 13.71 24.78	17 13.94 20.16	18 4.94 22.62	31 9.48 13.91	16 8.50 20.59	34 10.91 20.29	17 7.00 8.61	25 12.72 22.95	20 14.00 21.46	29 8.83 20.19	15 13.33 19.15	17 4.71 19.22	17 11.53 20.88	5 7.20 21.60	27 6.59 7.31

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

 **Topic 9: Marketing Performance**

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

	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
An hour	1 0.6%	1 1.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 2.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.1%
12 hours	1 0.6%	0 0.0%	0 0.0%	1 2.8%	0 0.0%	0 0.0%	1 2.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 1.1%
A day	2 1.3%	0 0.0%	0 0.0%	1 2.8%	1 5.3%	0 0.0%	2 4.0%	0 0.0%	0 0.0%	0 0.0%	1 1.5%	1 1.1%
A week	4 2.6%	0 0.0%	1 2.4%	2 5.6%	1 5.3%	0 0.0%	3 6.0%	0 0.0%	1 8.3%	0 0.0%	2 3.0%	2 2.2%
A month	10 6.4%	4 6.7%	3 7.3%	2 5.6%	1 5.3%	5 8.9%	4 8.0%	0 0.0%	1 8.3%	0 0.0%	5 7.6%	5 5.6%
Several months	38 24.4%	20 33.3%	9 22.0%	7 19.4%	2 10.5%	14 25.0%	10 20.0%	9 31.0%	2 16.7%	2 33.3%	19 28.8%	19 21.1%
6 months	16 10.3%	7 11.7%	4 9.8%	3 8.3%	2 10.5%	6 10.7%	7 14.0%	2 6.9%	1 8.3%	0 0.0%	11 16.7%	5 5.6%
1 year	34 21.8%	10 16.7%	12 29.3%	8 22.2%	4 21.1%	10 17.9%	13 26.0%	6 20.7%	4 33.3%	0 0.0%	9 13.6%	25 27.8%
2 years	29 18.6%	11 18.3%	9 22.0%	5 13.9%	4 21.1%	13 23.2%	5 10.0%	6 20.7%	2 16.7%	3 50.0%	10 15.2%	19 21.1%
5 years	14 9.0%	3 5.0%	3 7.3%	5 13.9%	3 15.8%	5 8.9%	3 6.0%	4 13.8%	0 0.0%	1 16.7%	6 9.1%	8 8.9%
7 years	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%
10 years or more	7 4.5%	4 6.7%	0 0.0%	2 5.6%	1 5.3%	3 5.4%	1 2.0%	2 6.9%	1 8.3%	0 0.0%	3 4.5%	4 4.4%

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

Topic 9: Marketing Performance

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

	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
An hour	0 0.0%	0 0.0%	1 6.7%	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%
12 hours	0 0.0%	0 0.0%	1 6.7%	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%
A day	0 0.0%	1 12.5%	1 6.7%	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%
A week	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 25.0%	0 0.0%	1 14.3%	0 0.0%	0 0.0%	1 10.0%	0 0.0%	0 0.0%	0 0.0%	1 10.0%
A month	0 0.0%	0 0.0%	2 13.3%	0 0.0%	0 0.0%	0 0.0%	1 5.3%	0 0.0%	0 0.0%	0 0.0%	1 10.0%	0 0.0%	3 10.3%	1 33.3%	2 20.0%
Several months	2 9.5%	1 12.5%	3 20.0%	0 0.0%	3 60.0%	0 0.0%	5 26.3%	3 42.9%	8 53.3%	2 100.0%	3 30.0%	0 0.0%	6 20.7%	0 0.0%	2 20.0%
6 months	3 14.3%	1 12.5%	0 0.0%	1 33.3%	0 0.0%	0 0.0%	2 10.5%	0 0.0%	1 6.7%	0 0.0%	2 20.0%	0 0.0%	5 17.2%	1 33.3%	0 0.0%
1 year	2 9.5%	4 50.0%	5 33.3%	1 33.3%	0 0.0%	2 50.0%	6 31.6%	0 0.0%	4 26.7%	0 0.0%	1 10.0%	1 20.0%	5 17.2%	1 33.3%	2 20.0%
2 years	10 47.6%	1 12.5%	1 6.7%	1 33.3%	2 40.0%	0 0.0%	2 10.5%	0 0.0%	0 0.0%	0 0.0%	1 10.0%	3 60.0%	7 24.1%	0 0.0%	1 10.0%
5 years	4 19.0%	0 0.0%	1 6.7%	0 0.0%	0 0.0%	0 0.0%	2 10.5%	2 28.6%	0 0.0%	0 0.0%	1 10.0%	1 20.0%	2 6.9%	0 0.0%	1 10.0%
7 years	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%
10 years or more	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 25.0%	1 5.3%	1 14.3%	2 13.3%	0 0.0%	0 0.0%	0 0.0%	1 3.4%	0 0.0%	1 10.0%

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

Topic 9: Marketing Performance

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

	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
An hour	0 0.0%	0 0.0%	1 5.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
12 hours	0 0.0%	0 0.0%	1 5.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 3.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
A day	0 0.0%	0 0.0%	1 5.3%	1 3.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 10.5%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
A week	1 4.8%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 5.7%	1 5.6%	1 4.2%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	2 12.5%	0 0.0%	1 3.6%
A month	1 4.8%	2 12.5%	2 10.5%	3 10.0%	1 6.7%	1 2.9%	0 0.0%	2 8.3%	1 5.3%	3 9.7%	2 15.4%	1 5.0%	1 6.3%	0 0.0%	0 0.0%
Several months	6 28.6%	5 31.3%	7 36.8%	6 20.0%	3 20.0%	8 22.9%	2 11.1%	8 33.3%	4 21.1%	8 25.8%	1 7.7%	8 40.0%	4 25.0%	0 0.0%	5 17.9%
Six months	1 4.8%	2 12.5%	1 5.3%	2 6.7%	2 13.3%	6 17.1%	1 5.6%	1 4.2%	2 10.5%	2 6.5%	2 15.4%	2 10.0%	2 12.5%	2 40.0%	3 10.7%
1 year	7 33.3%	3 18.8%	2 10.5%	7 23.3%	3 20.0%	6 17.1%	6 33.3%	8 33.3%	3 15.8%	7 22.6%	3 23.1%	2 10.0%	2 12.5%	1 20.0%	8 28.6%
2 years	2 9.5%	3 18.8%	4 21.1%	9 30.0%	2 13.3%	7 20.0%	2 11.1%	2 8.3%	5 26.3%	7 22.6%	3 23.1%	4 20.0%	3 18.8%	1 20.0%	4 14.3%
5 years	2 9.5%	1 6.3%	0 0.0%	1 3.3%	1 6.7%	4 11.4%	5 27.8%	2 8.3%	1 5.3%	1 3.2%	1 7.7%	1 5.0%	1 6.3%	0 0.0%	7 25.0%
7 years	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%
10 years or more	1 4.8%	0 0.0%	0 0.0%	1 3.3%	3 20.0%	1 2.9%	1 5.6%	0 0.0%	1 5.3%	1 3.2%	1 7.7%	2 10.0%	1 6.3%	1 20.0%	0 0.0%

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

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