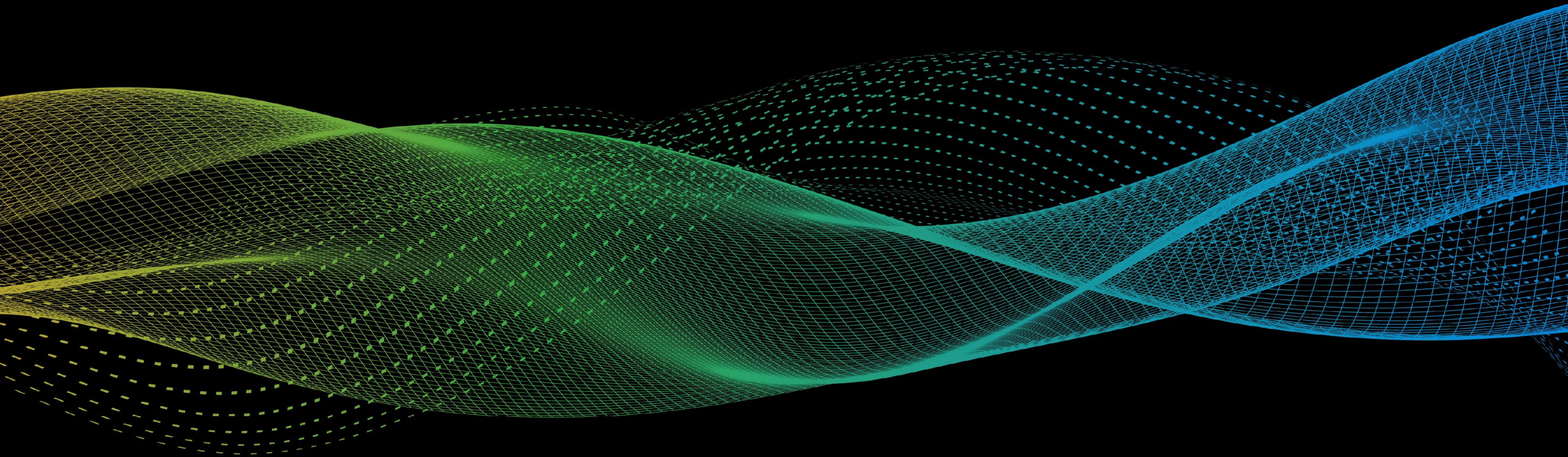
The CMO Survey®

Marketing Contracts Under Economic Pressure Despite Growing Value and AI Gains

Firm and Industry Breakout Report | 2026



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The CMO Survey®

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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Table of Contents

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	18	17	16	9	19	18	10	8	2	23	36
	22.2%	17.1%	24.6%	26.2%	26.5%	18.6%	22.8%	21.3%	36.4%	18.2%	22.1%	21.8%
2=No Change	73	34	15	14	10	26	24	11	4	4	28	45
	27.0%	32.4%	21.7%	23.0%	29.4%	25.5%	30.4%	23.4%	18.2%	36.4%	26.9%	27.3%
1=Less	137	53	37	31	15	57	37	26	10	5	53	84
	50.7%	50.5%	53.6%	50.8%	44.1%	55.9%	46.8%	55.3%	45.5%	45.5%	51.0%	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 A	Communi-cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac-turing I	Mining Construc-tion J	Profes-sional Services K	Real Estate L	Tech Software Platform M	Transpor-tation N	Retail Wholesale O
3=More	7	1	8	1	0	1	12	4	1	0	6	3	10	4	2
	22.6%	8.3%	32.0%	11.1%	0.0%	12.5%	38.7%	30.8%	3.8%	0.0%	30.0%	42.9%	20.0%	44.4%	12.5%
	i		i				I	i	acGhkLN		i	I		I	
2=No Change	8	3	6	5	4	2	5	3	14	0	6	1	11	2	2
	25.8%	25.0%	24.0%	55.6%	57.1%	25.0%	16.1%	23.1%	53.8%	0.0%	30.0%	14.3%	22.0%	22.2%	12.5%
	i		i	gmo	go		deI		acGMo				dI		dei
1=Less	16	8	11	3	3	5	14	6	11	3	8	3	29	3	12
	51.6%	66.7%	44.0%	33.3%	42.9%	62.5%	45.2%	46.2%	42.3%	100.0%	40.0%	42.9%	58.0%	33.3%	75.0%
									o		o				ik
Mean	1.71	1.42	1.88	1.78	1.57	1.50	1.94	1.85	1.62	1.00	1.90	2.00	1.62	2.11	1.38
							o							o	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	7	7	8	6	9	13	14	7	8	4	6	3	2	16
	24.3%	30.4%	25.9%	14.5%	27.3%	13.8%	36.1%	33.3%	26.9%	17.4%	14.3%	18.2%	12.5%	11.1%	30.2%
				g		g	df								
2=No Change	12	5	8	17	4	21	6	10	9	12	10	11	2	7	12
	32.4%	21.7%	29.6%	30.9%	18.2%	32.3%	16.7%	23.8%	34.6%	26.1%	35.7%	33.3%	8.3%	38.9%	22.6%
									f		f	f	bdeg	f	
1=Less	16	11	12	30	12	35	17	18	10	26	14	16	19	9	25
	43.2%	47.8%	44.4%	54.5%	54.5%	53.8%	47.2%	42.9%	38.5%	56.5%	50.0%	48.5%	79.2%	50.0%	47.2%
								F	F		f	f	ABdeh		f
Mean	1.81	1.83	1.81	1.60	1.73	1.60	1.89	1.90	1.88	1.61	1.64	1.70	1.33	1.61	1.83
								F	f				Abh		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			

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.

	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	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	46	12	25	12	24	38	22	7	1	39	56
	35.6%	44.2%	17.6%	41.7%	35.3%	23.5%	48.7%	46.8%	31.8%	9.1%	38.6%	33.9%
		B	AC	B		BC	Ae	Ae		bc		
Lower prices	8	2	3	2	1	2	2	3	1	0	0	8
	3.0%	1.9%	4.4%	3.3%	2.9%	2.0%	2.6%	6.4%	4.5%	0.0%	0.0%	4.8%
											b	a
No impact	130	39	43	28	19	63	26	18	13	9	44	85
	48.7%	37.5%	63.2%	46.7%	55.9%	61.8%	33.3%	38.3%	59.1%	81.8%	43.6%	51.5%
		B	A			BC	AdE	Ae	b	Bc		
No impact yet, but we expect to raise prices this year	34	17	10	5	2	13	12	4	1	1	18	16
	12.7%	16.3%	14.7%	8.3%	5.9%	12.7%	15.4%	8.5%	4.5%	9.1%	17.8%	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 A	Communications Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufacturing I	Mining Construction J	Professional Services K	Real Estate L	Tech Software Platform M	Transportation N	Retail Wholesale O
Higher prices	2 6.5% CDFghImNO	3 25.0% IO	12 48.0% AiKl	6 66.7% AgKlm	1 14.3% IO	4 50.0% AKl	9 29.0% adIknO	4 33.3% aIko	21 80.8% ABcEGHKLM	1 33.3%	1 5.0% CDFghImNO	0 0.0% cdfInO	13 26.5% adIknO	6 66.7% AgKlm	12 80.0% ABEGhKLM
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% bCDfgIJmNO	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% AbcEfGHKLM	0 0.0% Akl	15 75.0% CdIjnO	6 85.7% cdIjO	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% adegHInO	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%

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	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	7	7	17	10	30	16	9	5	17	6	14	13	5	26
	21.6%	30.4%	25.9%	30.9%	45.5%	46.2%	48.5%	21.4%	19.2%	37.0%	21.4%	42.4%	54.2%	27.8%	52.0%
	fg					a	a	FH	fH		fh		Abd		ABd
Lower prices	1	1	1	1	1	2	1	1	2	0	1	1	1	1	1
	2.7%	4.3%	3.7%	1.8%	4.5%	3.1%	3.0%	2.4%	7.7%	0.0%	3.6%	3.0%	4.2%	5.6%	2.0%
No impact	20	13	19	27	9	25	13	23	18	26	16	15	5	11	16
	54.1%	56.5%	70.4%	49.1%	40.9%	38.5%	39.4%	54.8%	69.2%	56.5%	57.1%	45.5%	20.8%	61.1%	32.0%
			eFg		c	C	c	Fh	FH	Fh	fh		ABCdg	fh	aBcdg
No impact yet, but we expect to raise prices this year	8	2	0	10	2	8	3	9	1	3	5	3	5	1	7
	21.6%	8.7%	0.0%	18.2%	9.1%	12.3%	9.1%	21.4%	3.8%	6.5%	17.9%	9.1%	20.8%	5.6%	14.0%
	c		ad	c				c		a					
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	4	3	7	1	5	4	4	2	0	9	6
	5.7%	3.9%	4.5%	11.9%	2.9%	5.1%	5.1%	8.7%	9.1%	0.0%	9.1%	3.7%
Lower investments	57	26	9	17	5	12	27	11	2	1	22	34
	21.6%	25.2%	13.4%	28.8%	14.7%	12.1%	34.6%	23.9%	9.1%	9.1%	22.2%	20.7%
			c	b		B	Ad		b			
No impact	160	57	45	32	25	66	37	28	15	10	54	106
	60.6%	55.3%	67.2%	54.2%	73.5%	66.7%	47.4%	60.9%	68.2%	90.9%	54.5%	64.6%
						b	aE			B		
No impact yet, but we expect to lower investments this year	23	10	8	2	3	11	6	3	3	0	8	15
	8.7%	9.7%	11.9%	3.4%	8.8%	11.1%	7.7%	6.5%	13.6%	0.0%	8.1%	9.1%
No impact yet, but we expect to increase investments this year	9	6	2	1	0	5	4	0	0	0	6	3
	3.4%	5.8%	3.0%	1.7%	0.0%	5.1%	5.1%	0.0%	0.0%	0.0%	6.1%	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 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
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% CgIjmO	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% CdgIJmnO	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

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	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	2	0	1	1	6	5	0	1	2	0	1	2	1	8
	0.0%	9.1%	0.0%	1.8%	4.5%	9.4%	15.2%	0.0%	3.8%	4.4%	0.0%	3.1%	8.3%	5.9%	16.0%
	g		g	g			acd	H			h				Ad
Lower investments	5	3	6	11	6	16	9	7	3	9	8	10	5	1	14
	13.5%	13.6%	23.1%	20.0%	27.3%	25.0%	27.3%	16.7%	11.5%	20.0%	28.6%	31.3%	20.8%	5.9%	28.0%
												g		e	
No impact	28	13	16	38	13	31	17	29	18	31	16	18	13	13	22
	75.7%	59.1%	61.5%	69.1%	59.1%	48.4%	51.5%	69.0%	69.2%	68.9%	57.1%	56.3%	54.2%	76.5%	44.0%
	Fg			f		Ad	a	h	h	h				h	abcg
No impact yet, but we expect to lower investments this year	3	4	3	2	1	8	2	5	4	1	1	3	3	0	6
	8.1%	18.2%	11.5%	3.6%	4.5%	12.5%	6.1%	11.9%	15.4%	2.2%	3.6%	9.4%	12.5%	0.0%	12.0%
		d		b					c	b					
No impact yet, but we expect to increase investments this year	1	0	1	3	1	3	0	1	0	2	3	0	1	2	0
	2.7%	0.0%	3.8%	5.5%	4.5%	4.7%	0.0%	2.4%	0.0%	4.4%	10.7%	0.0%	4.2%	11.8%	0.0%
											h			h	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 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
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% d	6 27.3% c	3 27.3%	53 51.5% b	63 38.4% 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% B	45 27.4% A
Increase our focus on premium or less price-sensitive segments	89 33.2%	29 27.9% c	19 27.5%	26 43.3% a	15 44.1%	32 31.4%	22 27.8%	18 39.1%	10 45.5%	4 36.4%	32 31.1%	56 34.1%
No change in our targeting strategy	71 26.5%	35 33.7% C	23 33.3% C	5 8.3% ABd	8 23.5% c	36 35.3% bc	15 19.0% a	8 17.4% a	6 27.3%	4 36.4%	22 21.4%	49 29.9%
Increase our focus on value-driven or more price-sensitive segments	71 26.5%	21 20.2% C	15 21.7% C	29 48.3% ABD	6 17.6% C	13 12.7% BCd	28 35.4% A	16 34.8% A	7 31.8% a	3 27.3%	23 22.3%	48 29.3%
Increase our focus on expanding into new geographic markets	52 19.4%	13 12.5% B	22 31.9% A	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%

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 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
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% aefgIjKlm
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)

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

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)

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

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)

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

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)

	Industry Sector														
Number Mean SD	Banking Finance Insurance A	Communi-cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac-turing I	Mining Construc-tion J	Profes-sional Services K	Real Estate L	Tech Software Platform M	Transpor-tation N	Retail Wholesale O
Demonstrating ROI from marketing technologies	25	10	17	4	5	6	20	10	19	3	13	4	40	7	12
	4.60	4.10	3.53	4.50	5.00	5.00	4.40	4.10	3.74	3.67	4.08	5.00	4.75	4.71	4.58
	1.19	1.97	1.97	1.00	2.12	2.00	1.47	1.79	1.73	2.89	1.61	1.83	1.39	1.50	1.24
	c		am						m				ci		
Integrating marketing technologies across other data systems in our company	25	10	17	4	5	6	21	10	19	3	13	4	40	7	12
	3.84	3.10	3.24	3.75	4.80	4.00	4.10	4.60	3.68	2.67	4.23	4.75	4.57	4.57	4.00
	1.43	1.66	1.48	0.96	1.48	1.67	1.70	1.71	1.53	0.58	1.59	2.22	1.47	0.79	1.41
		Mn	hMn					c	m	mN			BCij	bcJ	
Training current employees on emerging marketing technologies	25	10	17	4	5	6	20	10	19	3	12	4	40	7	12
	4.08	3.50	3.00	4.00	5.00	3.50	3.95	3.90	3.16	3.33	4.00	5.25	4.45	4.57	3.92
	1.44	1.96	1.27	0.82	2.35	1.64	1.61	1.79	1.74	1.15	1.91	2.06	1.47	0.79	1.73
	c		aelMN		c				lM			ci	CI	C	
Hiring to manage marketing technologies	25	9	17	4	5	6	20	10	19	3	13	4	40	7	12
	4.32	3.00	2.76	5.00	3.20	4.00	3.70	3.60	2.63	3.00	3.46	4.75	4.13	4.29	3.67
	1.52	1.58	1.30	1.15	1.30	1.79	1.63	1.26	1.92	2.00	2.11	2.22	1.64	1.25	1.61
	bCI	ad	ADlMn	bCi					AdMn			c	CI	ci	

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)

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

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

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

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% d	13 59.1% 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%
Your company is able to connect its digital marketing data with other intelligence you have about your customers	0 0.0%	0 0.0%	0 0.0%	0 0.0%	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 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 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% AbdeFghiklMn	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% e	4 40.0%	5 29.4%	1 25.0%	4 80.0% a	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% dgk	3 30.0%	2 11.8% dgk	3 75.0% aci	1 20.0%	1 16.7%	10 50.0% aci	3 37.5%	2 14.3% dgk	1 50.0%	7 53.8% aci	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	5	8	14	3	7	10	9	8	8	7	4	4	1	15
	30.8%	31.3%	34.8%	33.3%	21.4%	16.7%	50.0%	31.0%	38.1%	25.8%	33.3%	16.7%	21.1%	12.5%	46.9%
						G	F					h			e
Marketing has the right systems in place to track customer engagement in a way that informs its marketing roadmap	5	11	12	21	9	12	8	7	12	20	11	9	6	3	12
	19.2%	68.8%	52.2%	50.0%	64.3%	28.6%	40.0%	24.1%	57.1%	64.5%	52.4%	37.5%	31.6%	37.5%	37.5%
	BcdE	AF	a	af	Af	Bde		bCd	a	Afh	a		c		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:

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SE		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
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:

	Industry Sector														
Number Mean SE	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
Currently	25	11	18	4	5	6	20	8	20	3	14	5	41	6	12
	31.60	10.45	54.72	47.50	3.00	37.50	33.00	34.38	28.50	51.67	27.86	34.00	27.56	49.17	57.08
	5.08	4.07	7.71	15.88	2.00	14.24	5.15	11.70	5.76	22.42	9.22	13.27	3.81	13.00	8.67
	bceo	aCDfGhiJlmNO	aBEgIkM	Be	aCdGijlmnO	b	BcEo	b	bCeO	Be	co	be	bCeO	Be	aBEgIkM
2 years from Now	25	11	18	4	5	6	20	8	19	3	11	5	40	6	12
	31.40	18.64	51.11	31.25	2.00	39.17	42.50	35.63	34.21	43.33	32.64	35.00	23.63	40.00	58.33
	4.71	6.61	7.08	10.48	2.00	9.35	5.37	10.06	5.53	20.48	9.50	13.78	2.70	11.03	8.33
	ceO	CgO	aBEM	e	aCdFGhIjlMnO	E	bEM	e	Eo	e		e	CEGnO	em	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:

	Sales Revenue							Number of Employees							
Number Mean SE	<$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
Currently	26	18	24	45	17	46	20	30	22	36	23	26	19	10	32
	28.46	24.72	25.83	29.44	38.82	43.59	40.00	31.00	24.09	26.11	34.13	37.88	31.32	45.00	44.84
	7.04	6.68	4.92	4.08	8.28	4.08	5.45	6.32	4.40	4.88	6.42	5.20	7.33	8.69	4.43
	f	f	F	f		abCd			gH	H				b	BC
2 years from Now	26	17	21	45	17	46	19	30	22	33	23	25	19	10	31
	35.96	23.53	27.38	33.33	36.47	38.78	38.16	39.17	25.00	24.70	36.30	39.00	31.58	37.90	41.45
	4.74	4.92	5.62	3.98	7.64	4.04	5.83	4.55	4.04	3.94	5.76	5.94	7.23	10.05	4.25
		f				b		bc	aH	aeH		c			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	2	0	0	0	1	1	0	0	0	0	2
	1.0%	2.5%	0.0%	0.0%	0.0%	1.3%	1.7%	0.0%	0.0%	0.0%	0.0%	1.7%
2	8	4	1	3	0	4	2	2	0	0	3	5
	4.0%	5.0%	1.9%	6.5%	0.0%	5.3%	3.4%	5.4%	0.0%	0.0%	3.6%	4.2%
3	16	9	5	2	0	4	10	2	0	0	8	8
	7.9%	11.3%	9.4%	4.3%	0.0%	5.3%	16.9%	5.4%	0.0%	0.0%	9.6%	6.8%
						b	a					
4	28	13	6	3	5	15	9	2	1	0	14	14
	13.9%	16.3%	11.3%	6.5%	22.7%	19.7%	15.3%	5.4%	5.6%	0.0%	16.9%	11.9%
						c		a				
5	55	20	17	15	3	15	23	11	3	0	30	25
	27.2%	25.0%	32.1%	32.6%	13.6%	19.7%	39.0%	29.7%	16.7%	0.0%	36.1%	21.2%
						b	a				b	a
6	61	27	18	12	4	28	11	12	7	2	21	39
	30.2%	33.8%	34.0%	26.1%	18.2%	36.8%	18.6%	32.4%	38.9%	33.3%	25.3%	33.1%
						b	a					
7=Very Highly	32	5	6	11	10	9	3	8	7	4	7	25
	15.8%	6.3%	11.3%	23.9%	45.5%	11.8%	5.1%	21.6%	38.9%	66.7%	8.4%	21.2%
		CD	D	A	AB	DE	cDE	be	AB	ABc	b	a
Mean	5.16	4.83	5.21	5.39	5.86	5.09	4.63	5.43	6.11	6.67	4.95	5.31
		cD	d	a	Ab	DE	CDE	Be	AB	ABc		

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 Io	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	1	0	0	1	0	0	0	1	0	0	1	0	0
	0.0%	0.0%	4.2%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	5.0%	0.0%	0.0%
2	2	0	0	2	2	2	0	1	1	1	1	2	0	2	0
	7.7%	0.0%	0.0%	4.4%	11.8%	4.2%	0.0%	3.3%	4.5%	2.8%	4.2%	7.7%	0.0%	18.2%	0.0%
														h	g
3	3	2	1	3	2	1	4	3	1	3	1	2	2	0	4
	11.5%	11.1%	4.2%	6.7%	11.8%	2.1%	19.0%	10.0%	4.5%	8.3%	4.2%	7.7%	10.0%	0.0%	12.1%
						g	f								
4	3	1	2	5	5	7	3	2	3	7	4	1	5	2	4
	11.5%	5.6%	8.3%	11.1%	29.4%	14.6%	14.3%	6.7%	13.6%	19.4%	16.7%	3.8%	25.0%	18.2%	12.1%
												f	e		
5	7	4	7	10	3	17	7	7	5	9	5	6	6	4	13
	26.9%	22.2%	29.2%	22.2%	17.6%	35.4%	33.3%	23.3%	22.7%	25.0%	20.8%	23.1%	30.0%	36.4%	39.4%
6	5	10	9	19	3	12	2	11	10	10	11	10	1	2	6
	19.2%	55.6%	37.5%	42.2%	17.6%	25.0%	9.5%	36.7%	45.5%	27.8%	45.8%	38.5%	5.0%	18.2%	18.2%
	b	aefG	g	G	b	b	BcD	f	Fh	f	Fh	f	aBcDe		bd
7=Very Highly	6	1	4	6	2	8	5	6	2	5	2	5	5	1	6
	23.1%	5.6%	16.7%	13.3%	11.8%	16.7%	23.8%	20.0%	9.1%	13.9%	8.3%	19.2%	25.0%	9.1%	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
				e	d										

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)

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Current	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)

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

	Sales Revenue							Number of Employees							
Number Mean SD	<$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
Current	27	18	23	40	17	43	21	31	22	35	21	23	17	9	33
	21.85	34.17	15.87	28.75	15.82	24.49	25.00	23.23	30.45	19.57	25.81	22.09	19.82	29.44	26.97
	20.85	25.04	13.45	23.00	15.46	18.24	23.87	18.78	28.24	16.29	23.57	19.03	16.39	18.62	22.53
		Ce	Bd	ce	bd										
Next three Years	27	17	22	40	17	43	20	31	21	34	21	23	17	9	32
	48.33	62.94	49.68	58.35	57.94	58.84	52.25	51.77	58.71	51.74	60.71	58.26	54.12	65.56	55.94
	21.84	27.16	26.67	28.12	29.74	23.09	17.20	19.98	32.32	25.67	28.03	29.30	25.33	17.22	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 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
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% CIjn	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% CegIjn	57.5% cI	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% AdlM	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 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
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 reportss	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% acgIjm	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 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
Content creation	69.2%	70.6%	81.8%	85.0% f	86.7%	60.5% d	68.2%	76.7% g	76.2% g	78.8% g	90.9% G	68.2%	64.7%	33.3% abcDh	73.5% g
Content personalization	57.7% g	64.7%	68.2%	67.5%	46.7% g	60.5% g	86.4% aef	56.7%	71.4%	66.7%	68.2%	54.5%	64.7%	66.7%	73.5%
Targeting decisions	53.8% c	41.2%	22.7% afG	42.5%	40.0%	48.8% c	63.6% C	50.0%	38.1%	39.4%	36.4%	36.4%	52.9%	44.4%	58.8%
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% f	50.0%	64.7% d	44.4%	52.9%
Improving marketing ROI by optimizing marketing content and timing	38.5% d	64.7%	45.5%	65.0% a	46.7%	44.2%	45.5%	46.7%	61.9% e	51.5%	54.5%	27.3% b	52.9%	44.4%	52.9%
Customer segmentation	38.5%	35.3%	13.6% d	45.0% c	40.0%	37.2%	31.8%	36.7%	33.3%	33.3%	45.5%	27.3%	29.4%	33.3%	41.2%
Predictive analytics for customer insights	38.5%	35.3%	18.2% Fg	40.0%	46.7%	53.5% C	54.5% c	36.7%	47.6%	30.3% h	22.7% gh	36.4%	47.1%	66.7% d	58.8% cd
Data analysis and reporting: To measure performance, track metrics, and generate reports	38.5%	41.2%	27.3% f	50.0%	53.3%	55.8% c	54.5%	43.3%	38.1%	33.3% f	36.4% f	50.0%	70.6% cd	66.7%	52.9%
GEO (i.e., Generative Engine Optimization to get content to appear in AI-generated search results)	26.9% d	47.1%	31.8%	52.5% a	46.7%	44.2%	40.9%	33.3% d	47.6%	33.3% d	68.2% acfh	40.9%	29.4% d	55.6%	38.2% 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 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
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 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	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	$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	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 d	5.17	4.64 d	6.06 ac	5.00	4.87	5.15	4.07 e	6.75 d	4.73	5.18
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 c	4.81 b	4.21	4.25	4.06	4.57
Reducing susceptibility to attacks by malicious actors	4.30	4.21	4.48	3.71 d	5.29 c	4.27	4.23	4.40	3.64	4.75	4.42	4.22
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 B	3.11 A	3.36	3.29	4.50	3.76	3.57
Investing in hardware necessary for generative AI to work well	3.51	3.36	3.89 c	2.88 bd	4.18 c	3.88 b	2.98 a	3.60	2.77	4.25	3.56	3.46

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	Al	Al			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	ADGhkLMN	bCi	l	l	bCi	c	AdgLmn		c	BCefIO	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 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
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	10.74	12.29	17.26	13.60	10.63	16.00	13.00	13.19	15.33
			C	B		c		a				
Customer satisfaction	10.75	9.31	15.45	7.69	10.77	12.64	8.91	6.61	18.00	8.00	9.28	11.53
		b	ac	b			d	D	bC			

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	23.89	12.29	27.50	11.40	4.00	8.85	20.83	5.31	0.00	15.00	30.00	20.00	7.50	10.50
	bdilm	afgI		aFIn		bD	b	i	aBDhLM			aI	aI	d	
Marketing overhead costs	13.78	18.89	7.69	30.00	4.00	8.00	13.27	15.00	7.63	5.00	19.55	18.75	22.22	15.00	6.50
		cio	bDkM	CeIO	dm				bDkM		cio		CeIO		bDkM
Customer satisfaction	10.45	17.22	2.25	25.00	6.00	5.00	7.00	8.33	5.19	0.00	18.67	20.00	15.57	17.50	4.44
	cd	Cio	aBDkLmN	aCfgIO		dn	d		bDkLmn		ci	CIo	ci	CfiO	bDlN

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						
	<$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
Sales productivity	20.43 E	20.39 E	13.94 e	12.78	5.47 ABc	11.91	13.21
Marketing overhead costs	19.77	17.50	12.82	14.50	10.67	12.71	12.53
Customer satisfaction	11.95	18.24	7.94	11.29	6.33	9.94	8.15

	Number of Employees							
	<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	18.82 e	18.10 e	13.17	11.88	8.16 ab	11.67	8.00	15.36
Marketing overhead costs	18.33	15.25	13.06	18.44	11.47	13.33	10.00	13.52
Customer satisfaction	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)

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		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
				d	c							
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)

	Industry Sector														
Number Mean SD	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
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			l		l						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)

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

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

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.

	Sales Revenue							Number of Employees							
Number Mean SD	<$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
Existing products/ services in existing markets	31	19	24	47	17	52	25	35	23	40	23	25	20	14	37
	54.68	59.47	59.38	51.21	58.24	57.88	58.40	55.00	57.61	59.38	56.30	51.00	59.10	53.93	57.16
	24.56	25.54	22.81	23.80	24.23	24.58	25.93	24.61	17.38	25.95	21.91	29.79	24.44	23.63	24.85
New products/services in existing markets	31	19	24	47	17	52	25	35	23	40	23	25	20	14	37
	23.55	23.16	22.29	22.85	22.65	22.90	22.88	23.43	23.04	23.50	17.70	21.44	24.10	25.00	24.38
	21.69	19.38	22.12	17.22	16.78	17.56	16.91	20.36	17.76	20.79	16.16	17.73	16.70	17.21	18.19
Existing products/ services in new markets	31	19	24	47	17	52	25	35	23	40	23	25	20	14	37
	15.65	12.63	13.96	18.40	10.88	12.06	12.44	15.29	14.57	11.63	18.70	17.48	11.50	13.21	12.19
	15.59	11.59	16.48	18.03	10.64	10.44	13.36	14.14	12.61	15.21	17.53	17.36	10.77	12.80	12.08
				f		d									
New products/services in new markets	31	19	24	47	17	52	25	35	23	40	23	25	20	14	37
	6.13	4.74	4.38	7.53	8.24	7.15	6.28	6.29	4.78	5.50	7.30	10.08	5.30	7.86	6.27
	7.50	7.35	8.64	10.47	12.74	8.74	7.19	7.98	5.53	9.18	8.14	14.81	6.74	11.22	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	B2B Services	B2C Product	B2C Services	0%	1-10%	11-49%	50-99%	100%	Yes	No
		A	B	C	D	A	B	C	D	E	A	B
N	217	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 A	Communi-cations Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufac-turing I	Mining Construc-tion J	Profes-sional Services K	Real Estate L	Tech Software Platform M	Transpor-tation N	Retail Wholesale O
N	28	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	ABCgIJKLO	HMnO	Hmn	fHMN	Hm	AbCIjKlO	AbcijKO	cdEFgHIMN

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	$10-25 million	$26-99 million	$100-499 million	$500-999 million	$1-9.9 billion	$10+ billion	<50	50-99	100-499	500-999	1,000-2,499	2,500-4,999	5000-9999	10,000+
	A	B	C	D	E	F	G	A	B	C	D	E	F	G	H
N	31	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	Acd	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 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	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 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
Japan	6	3	3	0	0	4	1	1	0	0	2	4
	5.1%	5.3%	9.4%	0.0%	0.0%	8.7%	2.9%	3.7%	0.0%	0.0%	3.7%	6.3%
Brazil	6	4	0	1	1	3	2	1	0	0	1	5
	5.1%	7.0%	0.0%	4.5%	14.3%	6.5%	5.9%	3.7%	0.0%	0.0%	1.9%	7.8%
			d		b							
Mexico	4	2	0	2	0	0	4	0	0	0	2	2
	3.4%	3.5%	0.0%	9.1%	0.0%	0.0%	11.8%	0.0%	0.0%	0.0%	3.7%	3.1%
						b	a					
Central America	4	1	3	0	0	2	0	2	0	0	3	1
	3.4%	1.8%	9.4%	0.0%	0.0%	4.3%	0.0%	7.4%	0.0%	0.0%	5.6%	1.6%
India	3	3	0	0	0	0	1	2	0	0	3	0
	2.5%	5.3%	0.0%	0.0%	0.0%	0.0%	2.9%	7.4%	0.0%	0.0%	5.6%	0.0%
Indonesia and Southeast Asia	2	2	0	0	0	1	1	0	0	0	2	0
	1.7%	3.5%	0.0%	0.0%	0.0%	2.2%	2.9%	0.0%	0.0%	0.0%	3.7%	0.0%
Russia	1	1	0	0	0	0	0	1	0	0	0	1
	0.8%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	1.6%
Korea	1	1	0	0	0	1	0	0	0	0	1	0
	0.8%	1.8%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%
Scandinavia	1	0	0	0	1	0	0	0	1	0	1	0
	0.8%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	14.3%	0.0%	1.9%	0.0%
		D	d		Ab	d	d		ab			

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 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
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 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
Indonesia and Southeast Asia	0	0	0	1	0	1	0	0	0	0	1	0	0	0	1
	0.0%	0.0%	0.0%	3.8%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	5.6%
Japan	0	1	0	3	1	1	0	0	1	3	1	1	0	0	0
	0.0%	9.1%	0.0%	11.5%	10.0%	3.7%	0.0%	0.0%	7.7%	13.0%	7.1%	6.7%	0.0%	0.0%	0.0%
Korea	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0
	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Mexico	0	0	1	0	2	1	0	0	0	1	0	1	1	1	0
	0.0%	0.0%	7.1%	0.0%	20.0%	3.7%	0.0%	0.0%	0.0%	4.3%	0.0%	6.7%	12.5%	12.5%	0.0%
				e	d										
Middle East	0	0	2	3	0	3	0	0	0	2	3	1	0	1	1
	0.0%	0.0%	14.3%	11.5%	0.0%	11.1%	0.0%	0.0%	0.0%	8.7%	21.4%	6.7%	0.0%	12.5%	5.6%
								d			a				
Scandinavia	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%
Russia	0	0	0	1	0	0	0	0	0	0	0	1	0	0	0
	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%
Central America	0	1	0	2	0	1	0	0	0	2	0	2	0	0	0
	0.0%	9.1%	0.0%	7.7%	0.0%	3.7%	0.0%	0.0%	0.0%	8.7%	0.0%	13.3%	0.0%	0.0%	0.0%
Brazil	0	2	0	2	1	1	0	1	1	1	2	0	0	1	0
	0.0%	18.2%	0.0%	7.7%	10.0%	3.7%	0.0%	5.3%	7.7%	4.3%	14.3%	0.0%	0.0%	12.5%	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 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
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% cefghim	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 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
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 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
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% aIo	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% AfIo	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 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
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	Acd	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	Ae			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	DEFlmn		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 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
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
											f		dh		f
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
										dh	cg			dh	cg
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
				e	d							h			e
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.

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

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.

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

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.

	Sales Revenue							Number of Employees							
Number Mean SD	<$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 build new marketing capabilities ourselves by training current or hiring new employees with the skills.	23	17	18	34	16	34	18	26	20	31	17	19	16	5	28
	64.13	65.59	68.50	60.44	56.56	51.62	60.00	59.62	76.75	56.39	53.24	52.63	65.94	54.00	56.43
	38.01	34.09	23.05	27.81	33.75	23.18	25.67	36.25	23.41	33.12	27.50	29.12	27.94	16.73	23.80
			f			c			cDEH	b	B	B			B
We partner with other marketing agencies to learn new marketing skills.	23	17	18	34	16	34	18	26	20	31	17	19	16	5	28
	10.22	12.06	11.06	18.65	15.94	19.85	12.78	10.19	10.75	16.55	22.35	19.47	15.94	18.00	15.00
	24.05	16.68	16.68	21.90	20.27	17.60	12.51	22.74	13.89	19.10	27.05	17.15	24.51	12.55	11.94
We partner with other companies to learn new marketing skills.	23	17	18	34	16	34	18	26	20	31	17	19	16	5	28
	12.39	12.94	14.06	8.91	13.13	11.62	15.83	17.69	7.50	13.42	12.65	12.63	7.81	6.00	14.82
	16.91	23.32	16.24	10.71	17.59	12.11	15.17	21.03	13.91	15.16	19.21	12.73	14.60	6.52	12.80
We partner with other consultancies to learn new marketing skills.	23	17	18	34	16	34	18	26	20	31	17	19	16	5	28
	13.26	8.24	5.00	11.41	7.81	13.38	10.00	12.50	4.75	12.19	10.00	11.58	7.19	14.00	11.07
	23.87	12.86	8.74	15.46	15.05	14.76	7.86	22.55	8.03	16.49	17.59	17.95	8.16	15.57	7.50
			f			c			H						B
We buy other companies to acquire new marketing skills.	23	17	18	34	16	34	18	26	20	31	17	19	16	5	28
	0.00	1.18	1.39	0.59	6.56	3.53	1.39	0.00	0.25	1.45	1.76	3.68	3.13	8.00	2.68
	0.00	3.32	4.79	2.05	13.99	7.54	2.87	0.00	1.12	3.46	6.11	11.77	7.04	13.04	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% d	11 20.8%	6 18.8%	0 0.0% a	0 0.0%	20 28.6% B	12 11.9% A
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% C	18 36.7%	22 55.0% A	9 50.0%	22 35.5%	16 30.2%	15 46.9%	8 57.1%	4 66.7%	15 21.4% B	51 50.5% A
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 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 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% m	0 0.0%	0 0.0%	1 25.0% M	2 11.1%	1 14.3% m	5 31.3% M	1 33.3% M	2 15.4% m	1 20.0% m	0 0.0% cFhIJkLN	1 25.0% M	0 0.0%
5	2 8.7% n	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% a	2 18.2%
6	6 26.1%	3 33.3%	5 31.3%	2 50.0% g	1 25.0%	2 50.0% g	1 5.6% dfhiLmo	3 42.9% g	6 37.5% g	1 33.3%	2 15.4%	3 60.0% G	11 32.4% g	1 25.0%	4 36.4% g
7=Very important	12 52.2% I	5 55.6% i	7 43.8% i	1 25.0%	2 50.0% i	1 25.0%	11 61.1% In	2 28.6%	1 6.3% AbceGmo	1 33.3%	4 30.8%	1 20.0%	13 38.2% i	0 0.0% g	5 45.5% i
Mean	6.13 I	6.44 IN	6.06 i	6.00	6.25	5.75	6.17 I	5.86	5.06 ABcGMO	5.67	5.46	5.80	6.03 In	5.00 Bmo	6.27 In

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	0	1	0	0	1	0	0	2	1	1	0	0	0	0
	4.3%	0.0%	5.3%	0.0%	0.0%	2.6%	0.0%	0.0%	10.0%	3.1%	5.6%	0.0%	0.0%	0.0%	0.0%
4=Moderately important	1	1	2	5	3	5	1	1	2	3	4	3	3	0	2
	4.3%	5.9%	10.5%	13.9%	17.6%	13.2%	5.3%	3.8%	10.0%	9.4%	22.2%	13.6%	17.6%	0.0%	6.7%
5	4	4	3	5	4	7	4	4	2	6	3	6	3	1	7
	17.4%	23.5%	15.8%	13.9%	23.5%	18.4%	21.1%	15.4%	10.0%	18.8%	16.7%	27.3%	17.6%	16.7%	23.3%
6	5	5	5	14	3	14	5	8	4	9	7	6	6	2	9
	21.7%	29.4%	26.3%	38.9%	17.6%	36.8%	26.3%	30.8%	20.0%	28.1%	38.9%	27.3%	35.3%	33.3%	30.0%
7=Very important	12	7	8	12	7	11	9	13	10	13	3	7	5	3	12
	52.2%	41.2%	42.1%	33.3%	41.2%	28.9%	47.4%	50.0%	50.0%	40.6%	16.7%	31.8%	29.4%	50.0%	40.0%
								d	d		ab				
Mean	6.13	6.06	5.89	5.92	5.82	5.76	6.16	6.27	5.90	5.94	5.39	5.77	5.76	6.33	6.03
								D			Ah				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	49	35	30	15	48	37	23	13	6	49	80
	78.2%	80.3%	74.5%	76.9%	83.3%	80.0%	71.2%	76.7%	92.9%	100.0%	72.1%	82.5%
Increase the speed of marketing actions	108	41	31	26	10	40	36	16	9	5	49	59
	65.5%	67.2%	66.0%	66.7%	55.6%	66.7%	69.2%	53.3%	64.3%	83.3%	72.1%	60.8%
Increase the effectiveness of managing customers	86	34	21	20	11	30	29	15	10	1	40	46
	52.1%	55.7%	44.7%	51.3%	61.1%	50.0%	55.8%	50.0%	71.4%	16.7%	58.8%	47.4%
									e	d		
Show our marketing strength to potential or current partners	69	23	26	13	7	27	19	12	6	4	29	40
	41.8%	37.7%	55.3%	33.3%	38.9%	45.0%	36.5%	40.0%	42.9%	66.7%	42.6%	41.2%
			c	b								
Difficult for competitors to imitate marketing strategies	61	22	17	18	4	22	22	9	5	2	27	34
	37.0%	36.1%	36.2%	46.2%	22.2%	36.7%	42.3%	30.0%	35.7%	33.3%	39.7%	35.1%
Attract or retain top managers and employees	55	19	15	14	7	22	16	13	2	1	22	33
	33.3%	31.1%	31.9%	35.9%	38.9%	36.7%	30.8%	43.3%	14.3%	16.7%	32.4%	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?

Industry Sector

N=165	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
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% l	6 66.7% fm	4 26.7% ikl	1 33.3%	1 25.0% l	0 0.0% bikl	8 44.4% l	2 28.6% l	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% l
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 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
Get higher ROI for every marketing dollar spent	16	14	13	29	12	28	16	21	13	25	13	16	12	4	25
	72.7%	82.4%	72.2%	80.6%	70.6%	80.0%	84.2%	80.8%	72.2%	80.6%	76.5%	72.7%	75.0%	66.7%	86.2%
Increase the speed of marketing actions	15	10	12	24	13	24	10	20	10	19	8	19	11	4	17
	68.2%	58.8%	66.7%	66.7%	76.5%	68.6%	52.6%	76.9%	55.6%	61.3%	47.1%	86.4%	68.8%	66.7%	58.6%
									e		e	bdh			e
Increase the effectiveness of managing customers	12	9	7	19	7	15	16	13	9	15	7	9	7	5	21
	54.5%	52.9%	38.9%	52.8%	41.2%	42.9%	84.2%	50.0%	50.0%	48.4%	41.2%	40.9%	43.8%	83.3%	72.4%
	g	g	G	g	g	G	abCdeF				h	h			de
Show our marketing strength to potential or current partners	12	4	7	18	8	13	7	14	7	8	10	10	8	2	10
	54.5%	23.5%	38.9%	50.0%	47.1%	37.1%	36.8%	53.8%	38.9%	25.8%	58.8%	45.5%	50.0%	33.3%	34.5%
								c		ad	c				
Difficult for competitors to imitate marketing strategies	7	7	5	14	8	12	8	9	5	10	7	11	7	4	8
	31.8%	41.2%	27.8%	38.9%	47.1%	34.3%	42.1%	34.6%	27.8%	32.3%	41.2%	50.0%	43.8%	66.7%	27.6%
Attract or retain top managers and employees	5	4	7	11	10	13	5	6	5	9	6	12	8	3	6
	22.7%	23.5%	38.9%	30.6%	58.8%	37.1%	26.3%	23.1%	27.8%	29.0%	35.3%	54.5%	50.0%	50.0%	20.7%
	e	e			ab			e				ah	h		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	58	55	31	89	71	42	20	9	97	140
	94.4%	95.9%	92.1%	93.2%	100.0%	94.7%	95.9%	93.3%	95.2%	90.0%	97.0%	92.7%
Digital marketing	235	91	57	58	29	84	72	42	20	10	95	139
	93.3%	92.9%	90.5%	98.3%	93.5%	89.4%	97.3%	93.3%	95.2%	100.0%	95.0%	92.1%
						b	a					
Advertising	219	84	51	55	28	81	65	38	18	10	85	133
	86.9%	85.7%	81.0%	93.2%	90.3%	86.2%	87.8%	84.4%	85.7%	100.0%	85.0%	88.1%
			c	b								
Social media	210	83	51	49	26	75	67	37	15	9	82	127
	83.3%	84.7%	81.0%	83.1%	83.9%	79.8%	90.5%	82.2%	71.4%	90.0%	82.0%	84.1%
							d		b			
Marketing analytics	198	79	49	45	25	70	63	37	13	9	86	111
	78.6%	80.6%	77.8%	76.3%	80.6%	74.5%	85.1%	82.2%	61.9%	90.0%	86.0%	73.5%
							d		b		b	a
Positioning	193	76	48	45	23	72	61	35	13	7	73	119
	76.6%	77.6%	76.2%	76.3%	74.2%	76.6%	82.4%	77.8%	61.9%	70.0%	73.0%	78.8%
							d		b			
Marketing research	186	73	39	49	25	60	63	36	14	6	78	107
	73.8%	74.5%	61.9%	83.1%	80.6%	63.8%	85.1%	80.0%	66.7%	60.0%	78.0%	70.9%
			c	b		B	A					
Public relations	182	71	49	38	23	73	57	31	9	7	73	108
	72.2%	72.4%	77.8%	64.4%	74.2%	77.7%	77.0%	68.9%	42.9%	70.0%	73.0%	71.5%
						D	D	d	ABc			
Promotion	176	70	45	40	21	60	57	30	15	9	79	96
	69.8%	71.4%	71.4%	67.8%	67.7%	63.8%	77.0%	66.7%	71.4%	90.0%	79.0%	63.6%
											B	A
Lead generation	169	74	45	28	22	67	48	29	13	7	77	91
	67.1%	75.5%	71.4%	47.5%	71.0%	71.3%	64.9%	64.4%	61.9%	70.0%	77.0%	60.3%
		C	C	ABd	c						B	A
Marketing technology	165	65	43	36	21	56	51	35	13	6	72	92
	65.5%	66.3%	68.3%	61.0%	67.7%	59.6%	68.9%	77.8%	61.9%	60.0%	72.0%	60.9%
						c		a				

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

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

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Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252	Industry Sector														
	Banking Finance Insurance A	Communications Media B	Consumer Packaged Goods C	Consumer Services D	Education E	Energy F	Healthcare G	Pharma Biotech H	Manufacturing I	Mining Construction J	Professional Services K	Real Estate L	Tech Software Platform M	Transportation N	Retail Wholesale 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% ACFglM	15 62.5% fn	3 100.0% n	12 70.6% n	7 100.0% dhN	39 83.0% DHN	2 22.2% ACFGijkLMo	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% ADEFGijklM	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

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Topic 5: Marketing Leadership

What is marketing primarily responsible for in your company?

N=252	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
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% AfglM	12 50.0% acM	1 33.3%	6 35.3% CM	1 14.3% Ch	3 6.4% CdgHIKNO	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?

N=252	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
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% AfGjKlM	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% bCDegHIm 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% eh	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 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
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% b	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%

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	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	11 32.4% Ef	2 10.0%	7 26.9% e	11 20.4% e	0 0.0% Acdg	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%

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)

	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 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/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						

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)

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

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.

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

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.

	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

Excludes Non-Profits

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

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?

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		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
Managing the present	249	97	62	58	31	93	73	45	21	10	100	148
	68.20	69.43	69.47	66.95	65.10	70.08	67.53	66.40	63.24	72.50	70.15	66.81
	17.13	18.65	16.04	16.18	15.60	16.34	18.93	15.35	18.62	15.86	17.59	16.77
Preparing for the future	249	97	62	58	31	93	73	45	21	10	100	148
	31.80	30.57	30.53	33.05	34.90	29.92	32.47	33.60	36.76	27.50	29.85	33.19
	17.13	18.65	16.04	16.18	15.60	16.34	18.93	15.35	18.62	15.86	17.59	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?

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

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?

	Sales Revenue							Number of Employees							
Number Mean SD	<$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
Managing the present	34	20	26	54	18	61	32	38	23	44	27	31	22	16	48
	66.82	75.25	73.96	67.31	73.89	66.69	62.50	67.63	74.35	72.32	66.48	70.97	65.82	63.00	63.96
	19.26	11.29	17.22	17.85	14.41	16.24	17.83	18.84	15.32	15.99	17.31	15.89	18.78	18.46	16.11
		fG	g		g	b	Bce		gh	h				b	bc
Preparing for the future	34	20	26	54	18	61	32	38	23	44	27	31	22	16	48
	33.18	24.75	26.04	32.69	26.11	33.31	37.50	32.37	25.65	27.68	33.52	29.03	34.18	37.00	36.04
	19.26	11.29	17.22	17.85	14.41	16.24	17.83	18.84	15.32	15.99	17.31	15.89	18.78	18.46	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	4.09	3.81	4.38	4.08	4.96	5.06	3.83	3.33	4.95	4.06
		bC	a	A								
Preparation for earnings calls												
Mean	4.62	5.24	4.45	3.85	4.75	4.73	5.04	3.81	4.67	4.00	4.81	4.39
		c		a								

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	4.50	4.14	3.67	---	6.20	4.92	4.83	5.20	---	3.50	2.50	6.08	3.83	2.50
	fM	m	m	m		al			l			fiM	AbcdLNO	M	M
Preparation for earnings calls															
Mean	3.17	5.00	4.00	5.33	---	5.40	5.08	5.00	6.20	---	3.50	3.00	5.42	4.83	1.00
	im								aL			I	a		

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% c	2 3.2%	0 0.0% a	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% c	6 9.7%	7 11.9% ad	0 0.0% c	3 3.2% d	4 5.5%	4 8.9%	3 15.0% a	0 0.0%	7 7.0%	9 6.0%
4	26 10.4%	13 13.4% c	7 11.3%	2 3.4% a	4 12.9%	6 6.4% b	12 16.4% a	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% c	17 37.8% bd	2 10.0% c	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% c	17 27.4%	26 44.1% a	9 29.0%	33 35.1%	20 27.4%	13 28.9%	8 40.0%	4 40.0%	24 24.0% b	54 36.2% a
Mean	5.52	5.37	5.37	5.78	5.77	5.60	5.47	5.51	5.65	6.10	5.27 b	5.69 a

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% Ik	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% ahijkL	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% bfgho	1 20.0%	4 50.0% di	11 39.3% di	6 50.0% di	3 12.5% bfgho	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 aIjn	5.68 i	5.25	5.20	5.88	6.00 aIjn	5.92 i	4.63 BcGhM	4.33 bgm	5.24 m	5.14	5.93 aIjkN	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	1	1	5	0	1	0	1	2	1	2	2	0	1
	0.0%	0.0%	3.8%	1.9%	27.8%	0.0%	3.0%	0.0%	4.3%	4.5%	3.7%	6.5%	9.1%	0.0%	2.0%
	E	e	e	E	AbcDFg	E	e								
3	0	1	2	3	1	6	2	1	2	2	3	1	2	2	3
	0.0%	5.0%	7.7%	5.6%	5.6%	9.7%	6.1%	2.7%	8.7%	4.5%	11.1%	3.2%	9.1%	12.5%	6.0%
4	1	1	4	7	1	5	7	1	2	10	2	3	1	0	7
	3.0%	5.0%	15.4%	13.0%	5.6%	8.1%	21.2%	2.7%	8.7%	22.7%	7.4%	9.7%	4.5%	0.0%	14.0%
	g						a	c		ag				c	
5	5	6	6	11	3	20	10	8	4	9	2	11	5	4	18
	15.2%	30.0%	23.1%	20.4%	16.7%	32.3%	30.3%	21.6%	17.4%	20.5%	7.4%	35.5%	22.7%	25.0%	36.0%
											eH	d			D
6	8	5	6	15	3	18	5	6	7	10	9	7	4	7	10
	24.2%	25.0%	23.1%	27.8%	16.7%	29.0%	15.2%	16.2%	30.4%	22.7%	33.3%	22.6%	18.2%	43.8%	20.0%
								g						a	
7=Very often	19	7	7	17	5	13	8	21	7	11	10	7	8	3	11
	57.6%	35.0%	26.9%	31.5%	27.8%	21.0%	24.2%	56.8%	30.4%	25.0%	37.0%	22.6%	36.4%	18.8%	22.0%
	cdeFG		a	a	a	A	A	CEgH		A		A		a	A
Mean	6.36	5.80	5.35	5.61	4.72	5.44	5.21	6.22	5.52	5.27	5.67	5.32	5.41	5.56	5.32
	bCDEFG	a	A	Ae	Ad	A	A	bCEfH	a	A		A	a		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	11	4	5	0	9	7	3	1	0	9	11
	8.1%	11.5%	6.6%	8.5%	0.0%	9.7%	9.6%	6.7%	4.8%	0.0%	9.2%	7.4%
2	29	12	8	6	3	13	9	3	1	1	13	16
	11.7%	12.5%	13.1%	10.2%	9.7%	14.0%	12.3%	6.7%	4.8%	10.0%	13.3%	10.7%
3	24	10	8	3	3	8	10	3	3	0	10	14
	9.7%	10.4%	13.1%	5.1%	9.7%	8.6%	13.7%	6.7%	14.3%	0.0%	10.2%	9.4%
4	39	10	13	9	7	13	11	7	3	3	13	26
	15.7%	10.4%	21.3%	15.3%	22.6%	14.0%	15.1%	15.6%	14.3%	30.0%	13.3%	17.4%
5	49	22	10	12	5	16	13	13	5	0	24	25
	19.8%	22.9%	16.4%	20.3%	16.1%	17.2%	17.8%	28.9%	23.8%	0.0%	24.5%	16.8%
6	50	19	13	11	7	18	13	12	3	4	19	30
	20.2%	19.8%	21.3%	18.6%	22.6%	19.4%	17.8%	26.7%	14.3%	40.0%	19.4%	20.1%
7=Very Likely	37	12	5	13	6	16	10	4	5	2	10	27
	14.9%	12.5%	8.2%	22.0%	19.4%	17.2%	13.7%	8.9%	23.8%	20.0%	10.2%	18.1%
			c	b								
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% ghI	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	1	4	3	3	7	1	1	3	4	0	5	2	1	4
	3.0%	5.0%	16.0%	5.6%	16.7%	11.3%	3.1%	2.7%	13.0%	9.3%	0.0%	16.1%	9.1%	6.3%	8.2%
											e	d			
2	2	2	4	6	2	7	3	3	4	6	5	5	2	1	3
	6.1%	10.0%	16.0%	11.1%	11.1%	11.3%	9.4%	8.1%	17.4%	14.0%	18.5%	16.1%	9.1%	6.3%	6.1%
3	1	4	3	3	3	6	4	4	1	6	2	2	2	1	6
	3.0%	20.0%	12.0%	5.6%	16.7%	9.7%	12.5%	10.8%	4.3%	14.0%	7.4%	6.5%	9.1%	6.3%	12.2%
	b	a													
4	8	3	3	13	3	4	5	9	4	8	5	4	3	0	6
	24.2%	15.0%	12.0%	24.1%	16.7%	6.5%	15.6%	24.3%	17.4%	18.6%	18.5%	12.9%	13.6%	0.0%	12.2%
	f			F		aD		g						a	
5	6	2	2	10	5	17	7	5	1	6	4	9	5	7	12
	18.2%	10.0%	8.0%	18.5%	27.8%	27.4%	21.9%	13.5%	4.3%	14.0%	14.8%	29.0%	22.7%	43.8%	24.5%
								g	eGh	g	g	b		aBcd	b
6	8	5	5	9	1	14	8	8	5	6	5	5	6	4	11
	24.2%	25.0%	20.0%	16.7%	5.6%	22.6%	25.0%	21.6%	21.7%	14.0%	18.5%	16.1%	27.3%	25.0%	22.4%
7=Very Likely	7	3	4	10	1	7	4	7	5	7	6	1	2	2	7
	21.2%	15.0%	16.0%	18.5%	5.6%	11.3%	12.5%	18.9%	21.7%	16.3%	22.2%	3.2%	9.1%	12.5%	14.3%
								e	e		e	abd			
Mean	5.06	4.50	4.04	4.63	3.67	4.40	4.69	4.78	4.35	4.21	4.74	3.84	4.50	4.94	4.63
	cE		a		Ag		e	e				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?

	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 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	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
			fgIkM	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 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	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	$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	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?

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Overall	163	65	44	36	18	59	52	30	14	5	70	93
marketing	1.74	-0.19	2.75	0.90	7.99	2.06	1.26	-0.32	5.63	12.00	1.25	2.12
spending	15.40	13.48	14.96	19.35	13.37	15.64	12.38	17.35	20.82	13.04	13.07	17.00
		d			a							
Digital	160	64	42	36	18	59	50	30	14	5	67	93
marketing	8.20	4.13	7.10	12.56	16.57	6.19	10.50	3.30	17.86	16.00	5.22	10.35
spending	22.46	18.99	14.72	28.32	32.04	19.29	22.35	24.40	31.41	15.17	18.16	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?

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

	Sales Revenue							Number of Employees							
Number Mean SD	<$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
Overall marketing spending	22	16	18	38	17	33	17	24	19	32	19	22	16	4	27
	6.02	5.90	-3.26	2.67	-5.12	3.25	-0.33	4.85	5.81	-0.61	3.21	-0.71	-0.75	13.35	-0.36
	15.86	12.95	19.29	16.63	12.58	16.03	8.58	16.90	11.72	16.82	17.52	16.75	14.01	19.54	11.49
	e	e			ab										
Digital marketing spending	22	16	18	38	17	32	15	24	19	32	19	22	16	4	24
	10.55	6.44	10.67	10.00	5.18	8.28	5.49	10.33	12.47	7.03	9.11	6.82	8.56	18.25	2.89
	24.31	21.27	30.88	23.31	17.14	21.86	14.54	24.68	14.38	26.94	24.03	25.24	21.03	13.12	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 A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
Digital marketing spending	154	60	43	34	17	57	47	29	12	6	67	87
	10.40	9.37	8.82	13.03	12.75	10.11	11.14	9.34	13.73	15.00	8.62	11.77
	15.08	13.63	14.50	18.21	14.89	14.58	14.25	16.02	18.77	11.83	13.58	16.08
Overall marketing spending	154	62	41	35	16	57	48	29	12	6	66	88
	7.61	5.44	8.18	9.14	11.21	6.88	6.43	6.29	17.38	13.33	6.24	8.64
	15.72	13.91	14.88	19.93	14.28	13.02	14.58	20.23	19.96	13.29	14.96	16.27
						d	d		ab			
Brand building	146	57	41	32	16	52	45	29	12	6	62	84
	5.87	5.14	8.31	5.02	3.88	9.14	3.75	3.60	4.86	8.33	4.56	6.83
	14.72	15.49	17.04	12.71	8.17	16.42	12.90	14.50	14.03	16.02	14.91	14.59
New product introductions	146	58	40	32	16	54	45	27	12	6	63	83
	5.85	7.04	2.97	9.29	1.88	5.32	6.12	6.09	8.53	2.50	6.97	5.00
	9.74	9.30	8.26	12.67	2.96	8.16	11.61	10.19	10.76	4.18	10.49	9.10
		bd	ac	bd	ac							
Customer relationship management	142	58	39	30	15	53	42	27	12	6	61	81
	3.50	3.93	4.53	1.90	2.33	3.41	3.67	3.89	3.92	1.67	3.54	3.46
	7.69	8.42	6.89	8.72	3.06	6.98	7.10	10.34	8.91	2.58	8.30	7.25
New service introductions	138	55	38	30	15	51	41	27	11	6	57	81
	3.17	3.53	3.04	3.27	2.00	2.94	2.90	3.21	7.92	-0.83	3.76	2.76
	6.20	6.67	5.96	6.91	3.02	4.99	5.41	7.42	9.60	4.92	6.29	6.13
						d	d		ab			
Customer experience spending	141	57	39	30	15	53	42	27	11	6	59	82
	3.03	3.75	1.64	2.83	4.33	3.03	2.64	2.79	5.51	3.33	2.91	3.12
	6.89	7.20	5.82	8.49	4.06	6.58	6.59	7.17	10.44	4.08	7.65	6.33
Traditional advertising spending	144	58	39	32	15	52	43	29	12	6	61	83
	-1.50	-0.32	-2.16	-4.06	1.07	0.88	-3.19	-3.80	-1.24	0.83	-2.00	-1.13
	13.33	12.23	14.67	15.69	6.96	12.96	9.55	18.51	15.35	6.65	15.17	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%).

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

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%).

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

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
...of your marketing budget do you currently spend on social media?	163	62	44	39	18	59	50	31	14	6	69	94
	14.25	9.50	15.65	19.31	16.24	12.64	15.04	15.06	19.05	13.06	12.77	15.33
	12.50	9.45	14.02	12.82	12.40	10.93	12.37	12.82	16.67	17.16	9.69	14.17
		BCd	A	A	a							
...will you spend in the next 12 months?	163	62	44	39	18	59	50	31	14	6	69	94
	17.06	11.69	19.22	22.52	18.40	15.12	17.66	18.16	23.74	16.03	15.12	18.48
	13.30	10.61	14.30	13.46	13.12	11.84	13.33	12.36	17.65	18.72	10.90	14.71
		BCd	A	A	a	d			a			
...do you predict you will spend in five years?	161	61	43	39	18	58	50	31	14	6	67	94
	23.06	17.44	24.45	29.43	24.96	21.38	23.87	23.04	30.99	19.05	22.26	23.63
	15.70	13.80	15.99	15.63	15.97	14.48	15.49	14.72	20.26	20.96	14.61	16.49
		bC	a	A		d			a			

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

Industry Sector

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

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

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	Bce	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	BClO	mo	CMO		Mo	gM	ABCdhIKLO	cO	AdeFGhIkMN

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 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	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	$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	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 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	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	$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	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	8.93	9.31	11.63	9.26	8.99
							e			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?

	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	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	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 Mean SD		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	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?

	Industry Sector														
Number Mean SD	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	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?

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

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	8	24	5	4	5	24	11	26	1	13	1	45	7	12
	70.3%	61.5%	85.7%	55.6%	57.1%	55.6%	75.0%	73.3%	89.7%	25.0%	56.5%	14.3%	72.6%	70.0%	63.2%
	L	i	jkL	i	i	i	jL	l	bdefJKLo	cgIm	cI	ACGhIMno	jL	l	il
Does not use channel partners	11	5	4	4	3	4	8	4	3	3	10	6	17	3	7
	29.7%	38.5%	14.3%	44.4%	42.9%	44.4%	25.0%	26.7%	10.3%	75.0%	43.5%	85.7%	27.4%	30.0%	36.8%
	L	i	jkL	i	i	i	jL	l	bdefJKLo	cgIm	cI	ACGhIMno	jL	l	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	12	23	44	17	48	39	28	16	39	22	23	21	14	50
	64.1%	50.0%	69.7%	72.1%	73.9%	62.3%	92.9%	63.6%	59.3%	69.6%	71.0%	59.0%	72.4%	70.0%	82.0%
	G	G	g	g	g	G	ABcdeF	h	h			h			abe
Does not use channel partners	14	12	10	17	6	29	3	16	11	17	9	16	8	6	11
	35.9%	50.0%	30.3%	27.9%	26.1%	37.7%	7.1%	36.4%	40.7%	30.4%	29.0%	41.0%	27.6%	30.0%	18.0%
	G	G	g	g	g	G	ABcdeF	h	h			h			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?

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
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% aBcekM	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% c	0 0.0% c	3 15.0% Cno	0 0.0% Cno	3 14.3% Cno	0 0.0%	0 0.0% bCNo	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?

N=165	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

Topic 8: Marketing Channels

What percent of your sales occur online? Average levels

Number Mean SD	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
		B2B Product A	B2B Services B	B2C Product C	B2C Services D	0% A	1-10% B	11-49% C	50-99% D	100% E	Yes A	No B
N	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

	Industry Sector														
Number Mean SD	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	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

	Sales Revenue							Number of Employees							
Number Mean SD	<$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	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	19.26	23.35	21.66	13.92	20.05	22.77	18.08
								e				ag		e	

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	57	43	8	11	45	75
	41.4%	49.6%	59.7%	11.8%	32.4%	41.7%	41.4%
		C	CD	ABd	Bc		
1-10%	85	35	13	28	9	42	43
	29.3%	30.4%	18.1%	41.2%	26.5%	38.9%	23.8%
			C	B		B	A
11-49%	50	14	12	18	6	16	34
	17.2%	12.2%	16.7%	26.5%	17.6%	14.8%	18.8%
		c		a			
50-99%	23	6	2	11	4	4	18
	7.9%	5.2%	2.8%	16.2%	11.8%	3.7%	9.9%
		c	C	aB			
100%	12	3	2	3	4	1	11
	4.1%	2.6%	2.8%	4.4%	11.8%	0.9%	6.1%
		d			a	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? Quintiles

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
0%	15	3	1	2	2	6	15	8	9	2	13	4	34	2	2
	42.9%	25.0%	3.8%	22.2%	28.6%	75.0%	50.0%	57.1%	32.1%	50.0%	59.1%	66.7%	57.6%	22.2%	11.1%
	Co	fm	AFGHIJKLM	f		bCdinO	CO	CO	Cfm	C	CO	Co	bCiO	f	aFGHKlM
1-10%	8	3	14	2	0	0	10	5	12	1	5	0	13	1	10
	22.9%	25.0%	53.8%	22.2%	0.0%	0.0%	33.3%	35.7%	42.9%	25.0%	22.7%	0.0%	22.0%	11.1%	55.6%
	co		aefklMn		cio	cio			efm		co	co	CiO	co	aefklMn
11-49%	5	2	10	1	3	1	2	1	5	1	3	0	7	5	4
	14.3%	16.7%	38.5%	11.1%	42.9%	12.5%	6.7%	7.1%	17.9%	25.0%	13.6%	0.0%	11.9%	55.6%	22.2%
	cn		aGhM		gm		CeN	cn	n		n	n	CeN	aGhiklM	
50-99%	3	3	1	3	0	1	3	0	2	0	1	0	3	1	2
	8.6%	25.0%	3.8%	33.3%	0.0%	12.5%	10.0%	0.0%	7.1%	0.0%	4.5%	0.0%	5.1%	11.1%	11.1%
		m	d	chkM				d			d		bD		
100%	4	1	0	1	2	0	0	0	0	0	0	2	2	0	0
	11.4%	8.3%	0.0%	11.1%	28.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	33.3%	3.4%	0.0%	0.0%
			EL		CGhIkmo		EL	el	EL		eL	CGhIKMo	eL		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	16	15	29	7	25	4	22	13	26	18	17	12	2	10
	51.3%	66.7%	50.0%	47.5%	31.8%	34.2%	11.1%	51.2%	48.1%	49.1%	60.0%	47.2%	41.4%	10.0%	19.2%
	G	eFG	G	G	b	Bg	ABCDf	GH	GH	GH	GH	GH	gh	ABCDEf	ABCDEf
1-10%	4	2	6	18	10	26	19	5	6	12	6	10	12	8	26
	10.3%	8.3%	20.0%	29.5%	45.5%	35.6%	52.8%	11.6%	22.2%	22.6%	20.0%	27.8%	41.4%	40.0%	50.0%
	dEFG	dEfG	G	abg	AB	Ab	ABCd	FgH	h	H	H	h	A	a	AbCDe
11-49%	6	3	5	8	4	13	10	6	5	7	3	8	2	7	12
	15.4%	12.5%	16.7%	13.1%	18.2%	17.8%	27.8%	14.0%	18.5%	13.2%	10.0%	22.2%	6.9%	35.0%	23.1%
										g	g		g	cdf	
50-99%	6	3	3	3	0	7	1	7	2	4	2	0	3	2	3
	15.4%	12.5%	10.0%	4.9%	0.0%	9.6%	2.8%	16.3%	7.4%	7.5%	6.7%	0.0%	10.3%	10.0%	5.8%
								e				a			
100%	3	0	1	3	1	2	2	3	1	4	1	1	0	1	1
	7.7%	0.0%	3.3%	4.9%	4.5%	2.7%	5.6%	7.0%	3.7%	7.5%	3.3%	2.8%	0.0%	5.0%	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.

	Total	Primary Economic Sector				Percent Online Sales					Sell to Government	
Number Mean SD		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 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		

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Topic 9: Marketing Performance

Rate your company's performance during the prior 12 months: Sales Revenue, Profits, Customer Acquisition, Customer Retention, and Brand Value.

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

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Topic 9: Marketing Performance

Rate your company's performance during the prior 12 months: Sales Revenue, Profits, Customer Acquisition, Customer Retention, and Brand Value.

	Sales Revenue							Number of Employees							
Number Mean SD	<$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 Revenue	23	17	19	30	16	35	16	26	20	32	13	19	16	5	27
	11.52	16.88	4.53	8.93	3.00	6.89	6.31	9.23	11.80	11.16	16.15	0.84	8.44	13.60	4.78
	29.15	26.80	17.64	24.20	11.85	9.83	7.29	25.42	18.30	31.39	20.01	10.55	8.86	17.67	5.28
									e		EH	bDfg	e	eh	Dg
Profits	22	17	19	31	16	34	15	25	20	31	14	18	16	5	26
	7.77	10.00	-0.05	9.16	1.00	6.79	10.07	7.08	11.75	3.71	10.93	3.61	5.38	8.00	7.73
	20.59	25.00	18.69	16.47	15.21	11.25	18.81	17.97	24.46	22.30	16.30	9.10	14.36	12.63	15.30
Customer Acquisition	21	17	18	31	15	33	17	25	20	30	14	17	17	5	26
	4.10	8.76	5.17	11.55	5.47	5.52	6.35	5.32	8.95	12.13	10.07	3.12	3.88	7.40	6.15
	16.67	13.81	15.31	19.59	9.90	10.01	7.25	16.19	13.61	22.04	19.06	7.44	7.70	14.36	9.92
Customer Retention	21	17	18	30	15	34	17	25	20	29	14	17	17	5	27
	9.52	12.82	11.67	13.10	18.00	12.47	11.00	11.24	13.80	11.21	25.71	7.59	23.88	18.20	4.07
	28.34	30.61	31.70	25.27	33.23	26.87	20.46	29.27	30.34	28.50	31.18	25.72	35.65	32.00	8.03
											H		H	h	DFg
Brand Value	21	17	18	31	16	34	17	25	20	29	15	17	17	5	27
	13.71	13.94	4.94	9.48	8.50	10.91	7.00	12.72	14.00	8.83	13.33	4.71	11.53	7.20	6.59
	24.78	20.16	22.62	13.91	20.59	20.29	8.61	22.95	21.46	20.19	19.15	19.22	20.88	21.60	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% d	3 6.0%	0 0.0%	1 8.3% a	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% b	5 5.6% A
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% b	25 27.8% A
2 years	29 18.6%	11 18.3%	9 22.0%	5 13.9%	4 21.1%	13 23.2%	5 10.0% e	6 20.7%	2 16.7%	3 50.0% b	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 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
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% f	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 25.0% agm	0 0.0% f	1 14.3% m	0 0.0%	0 0.0%	1 10.0%	0 0.0%	0 0.0% fh	0 0.0%	1 10.0%
A month	0 0.0% no	0 0.0%	2 13.3%	0 0.0%	0 0.0%	0 0.0%	1 5.3%	0 0.0%	0 0.0% n	0 0.0%	1 10.0%	0 0.0%	3 10.3%	1 33.3% ai	2 20.0% a
Several months	2 9.5% eIJ	1 12.5% j	3 20.0% j	0 0.0%	3 60.0% a	0 0.0%	5 26.3% j	3 42.9%	8 53.3% Alm	2 100.0% Abcglm	3 30.0%	0 0.0% ij	6 20.7% ij	0 0.0%	2 20.0%
6 months	3 14.3%	1 12.5%	0 0.0% dn	1 33.3% c	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% c	0 0.0%
1 year	2 9.5% b	4 50.0% ah	5 33.3%	1 33.3%	0 0.0%	2 50.0%	6 31.6%	0 0.0% b	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% cghIko	1 12.5%	1 6.7% al	1 33.3% i	2 40.0% i	0 0.0%	2 10.5% al	0 0.0% al	0 0.0% AdeLm	0 0.0%	1 10.0% a	3 60.0% cghI	7 24.1% i	0 0.0%	1 10.0% a
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% i	0 0.0% h	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% f	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 25.0% a	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% h	1 5.0%	1 6.3%	0 0.0%	0 0.0% d
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% g	2 10.5%	2 6.5% g	2 15.4%	2 10.0%	2 12.5%	2 40.0% ac	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% g	1 3.3% g	1 6.7%	4 11.4%	5 27.8% cd	2 8.3%	1 5.3%	1 3.2% h	1 7.7%	1 5.0%	1 6.3%	0 0.0%	7 25.0% c
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% e	1 3.3%	3 20.0% cf	1 2.9% e	1 5.6%	0 0.0% g	1 5.3%	1 3.2%	1 7.7%	2 10.0%	1 6.3%	1 20.0% ah	0 0.0% g

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

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