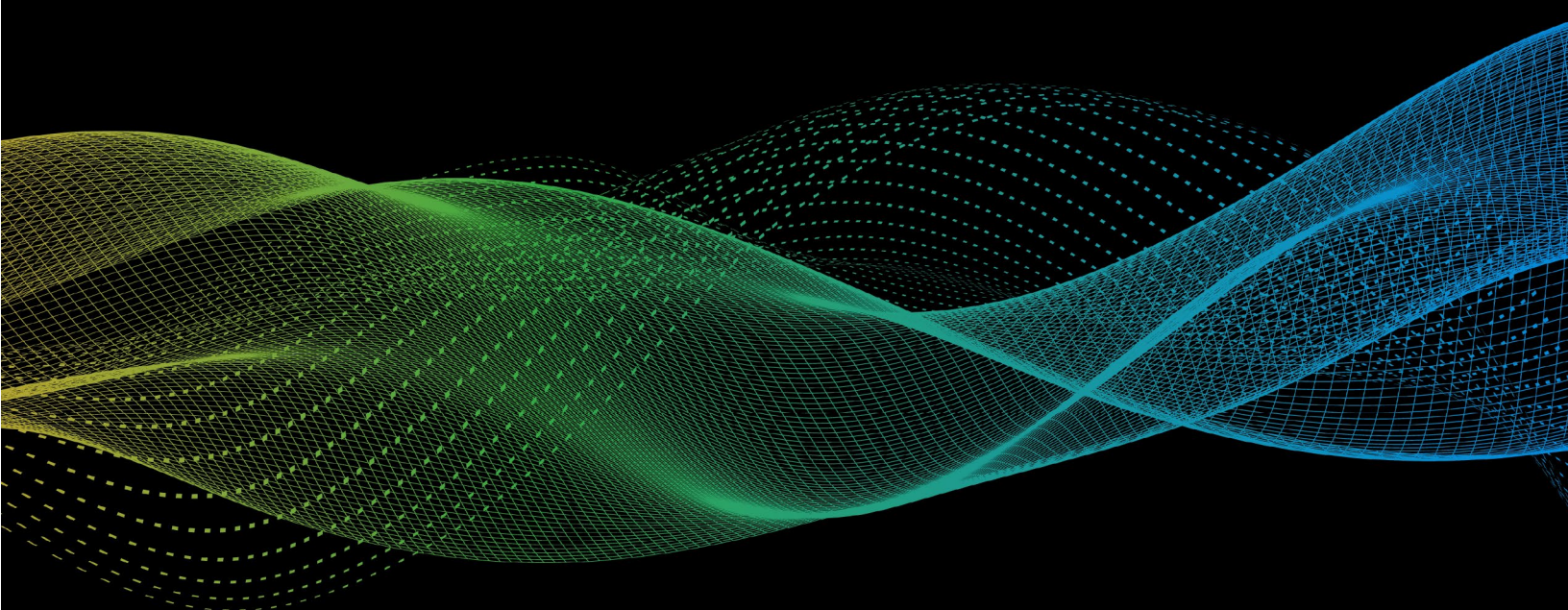


# Marketing Contracts Under Economic Pressure Despite Growing Value and AI Gains

Topline Report | 2026



# Marketing Contracts Under Economic Pressure Despite Growing Value and AI Gains

## The 35<sup>th</sup> 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 held in confidence and not shared with survey sponsors or any other parties.



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 **Topic 1: Macroeconomic Forecasts and Optimism****Are you more or less optimistic about the U.S. economy compared to last quarter?**

	Number	Percent	95% CI
3=More	60	22.2 %	± 4.5 %
2=No Change	73	27.0 %	± 4.8 %
1=Less	137	50.7 %	± 5.6 %
Total	270	100.0 %	

Mean = 1.71

SD = 0.81

Missing Cases = 38

Response Percent = 87.7 %



**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.**

Mean = 56.78

Minimum = 15.04

Maximum = 95

Median = 60

Standard Deviation (Unbiased Estimate) = 20.43

95 Percent Confidence Interval Around the Mean = 54.33 - 59.23

Valid Cases = 267

Missing Cases = 41

Response Percent = 86.7%



**Topic 1: Macroeconomic Forecasts and Optimism**

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

	Number	Percent	95% CI
Higher prices	95	35.6 %	± 5.2 %
Lower prices	8	3.0 %	± 1.8 %
No impact	130	48.7 %	± 5.6 %
No impact yet, but we expect to raise prices this year	34	12.7 %	± 3.5 %
No impact yet, but we expect to lower prices this year	0	0.0 %	± 0.0 %
Total	267	100.0 %	

Missing Cases = 41

Response Percent = 86.7 %

 **Topic 1: Macroeconomic Forecasts and Optimism**

**How have tariffs impacted your business investments?**

	Number	Percent	95% CI
Higher investments	15	5.7 %	± 2.4 %
Lower investments	57	21.6 %	± 4.4 %
No impact	160	60.6 %	± 5.6 %
No impact yet, but we expect to lower investments this year	23	8.7 %	± 3.0 %
No impact yet, but we expect to increase investments this year	9	3.4 %	± 1.9 %
Total	264	100.0 %	

Missing Cases = 44  
Response Percent = 85.7 %


**Topic 1: Macroeconomic Forecasts and Optimism**
**How are you changing your customer targeting strategy in response to economic shifts over the last year?**

	Number	Percent	95% CI
Increase our focus on building loyalty/retention of existing customers	117	43.7 %	± 6.0 %
Increase our focus on new segments in our current geographic markets	93	34.7 %	± 5.7 %
Increase our focus on premium or less price-sensitive segments	89	33.2 %	± 5.7 %
No change in our targeting strategy	71	26.5 %	± 5.3 %
Increase our focus on value-driven or more price-sensitive segments	71	26.5 %	± 5.3 %
Increase our focus on expanding into new geographic markets	52	19.4 %	± 4.8 %
Total	493		

Number of Cases = 268

Number of Responses = 493

Average Number of Responses Per Case = 1.8

Number of Cases with at least One Response = 268

Response Percent = 100.0%

 **Topic 2: Marketing Technology and AI**

**Rate how well your company is performing each of the following marketing technology activities:**

	Mean & SD	1 = Poorly	2	3	4	5	6	7= Very Well	Total
Selecting the right company to provide marketing technologies	4.86 1.43	5 2.6%	12 6.2%	15 7.7%	32 16.4%	57 29.2%	58 29.7%	16 8.2%	195 100.0%
Selecting the right mix of marketing technologies for our needs	4.84 1.47	6 3.1%	12 6.1%	17 8.7%	29 14.8%	58 29.6%	56 28.6%	18 9.2%	196 100.0%
Integrating marketing technologies into our customer funnel	4.76 1.35	5 2.6%	6 3.1%	21 10.8%	41 21.1%	61 31.4%	46 23.7%	14 7.2%	194 100.0%
Leveraging data from marketing technologies for tactical decision making	4.76 1.45	4 2.0%	13 6.6%	17 8.7%	46 23.5%	48 24.5%	49 25.0%	19 9.7%	196 100.0%
Leveraging data from Marketing technologies for strategic decision making	4.63 1.48	3 1.5%	16 8.2%	23 11.9%	43 22.2%	53 27.3%	34 17.5%	22 11.3%	194 100.0%
Designing the broad architecture of our marketing technology systems	4.56 1.49	9 4.6%	13 6.7%	20 10.3%	36 18.5%	65 33.3%	39 20.0%	13 6.7%	195 100.0%
Generating ROI from marketing technologies	4.53 1.62	10 5.2%	17 8.8%	18 9.3%	46 23.7%	39 20.1%	46 23.7%	18 9.3%	194 100.0%
Developing capabilities for using marketing technologies	4.50 1.53	8 4.2%	16 8.3%	21 10.9%	42 21.9%	52 27.1%	38 19.8%	15 7.8%	192 100.0%
Demonstrating ROI from marketing technologies	4.36 1.60	9 4.6%	21 10.8%	24 12.3%	46 23.6%	42 21.5%	37 19.0%	16 8.2%	195 100.0%
Integrating marketing technologies across other data systems in our company	4.04 1.55	12 6.1%	23 11.7%	32 16.3%	53 27.0%	41 20.9%	24 12.2%	11 5.6%	196 100.0%
Training current employees on emerging marketing technologies	3.94 1.63	14 7.2%	24 12.4%	43 22.2%	42 21.6%	35 18.0%	22 11.3%	14 7.2%	19 100.0%
Hiring to manage marketing technologies	3.68 1.69	23 11.9%	32 16.5%	35 18.0%	37 19.1%	38 19.6%	19 9.8%	10 5.2%	194 100.0%



## Topic 2: Marketing Technology and AI

### What is the biggest barrier to maximizing the impact of marketing technologies in your company?

	Number	Percent
Lack of budget and funding resources	40	20.1%
Technology integration and data architecture	38	19.1%
Bandwidth, time, and focus within the company	28	14.1%
Talent management (acquisition, training, and retention)	26	13.1%
Organizational silos and collaboration	16	8.0%
Executive support and strategic leadership	15	7.5%
Technology adoption and resistance to change	13	6.5%
Proving ROI and building use cases	12	6.0%
Other	11	5.5%
	199	100%



## Topic 2: Marketing Technology and AI

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

	Number	Percent	95% CI
Marketing leaders have a good understanding of the technology roadmap and capabilities they can use to do great marketing	123	66.5 %	± 6.9 %
We continuously test and iterate in using digital marketing	112	60.5 %	± 7.1 %
Marketing leaders are more collaborative with the CIO/CTO (or the equivalent technology leaders)	103	55.7 %	± 7.2 %
Marketing teams have the skills and training to best use your company's marketing systems powered by technology system/tools	92	49.7 %	± 7.3 %
Marketing has the right systems in place to track customer engagement in a way that informs its marketing roadmap	80	43.2 %	± 7.2 %
Your company has consolidated customer intelligence in a way that integrates customer data across all touchpoints	56	30.3 %	± 6.7 %
Total	566		

Number of Cases = 185

Number of Responses = 566

Average Number of Responses Per Case = 3.1

Number of Cases with at least One Response = 185

Response Percent = 100.0 %



**Topic 2: Marketing Technology and AI**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Currently	33.59%	29.11	29.53 - 37.64	25	0	100	198
2 years from now	34.27%	26.19	30.57 - 37.96	25	0	100	193

 **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?**

	Number	Percent	95% CI
1=Not at all	2	1.0 %	± 0.9 %
2	8	4.0 %	± 1.8 %
3	16	7.9 %	± 2.5 %
4	28	13.9 %	± 3.2 %
5	55	27.2 %	± 4.3 %
6	61	30.2 %	± 4.5 %
7=Very Highly	32	15.8 %	± 3.4 %
Total	202	100.0 %	

Mean = 5.16

SD = 1.37

Missing Cases = 106

Response Percent = 65.6 %

 **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)**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Current	24.17%	20.69	21.24 - 27.11	20	0	100	191
Next three years	55.91%	25.15	52.32 - 59.51	50	0	100	188



## Topic 2: Marketing Technology and AI

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

Number	Percent	95% CI	
Content creation	139	73.9 %	± 6.3 %
Content personalization	123	65.4 %	± 6.9 %
Improving marketing ROI by optimizing marketing content and timing	93	49.5 %	± 7.2 %
Marketing automation: AI-powered automation tools streamline marketing processes	92	48.9 %	± 7.2 %
Data analysis and reporting: To measure performance, track metrics, and generate reports	87	46.3 %	± 7.2 %
Targeting decisions	85	45.2 %	± 7.2 %
Predictive analytics for customer insights	78	41.5 %	± 7.1 %
GEO (i.e., Generative Engine Optimization to get content to appear in AI-generated search results)	78	41.5 %	± 7.1 %
Conversational AI for customer service (i.e., chatbots, virtual assistants)	75	39.9 %	± 7.1 %
Customer segmentation	67	35.6 %	± 6.9 %
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	61	32.4 %	± 6.8 %
Listening and sentiment analysis	53	28.2 %	± 6.5 %
Next best offer	24	12.8 %	± 4.8 %
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	18	9.6 %	± 4.2 %
Augmented and virtual reality	12	6.4 %	± 3.5 %
Voice search optimization	8	4.3 %	± 2.9 %
Facial recognition and visual search: Image and video recognition	7	3.7 %	± 2.7 %
Biometrics also known as chipping (i.e., body or hand implants)	2	1.1 %	± 1.5 %
Total	1102		

Number of Cases = 188

Number of Responses = 1102

Average Number of Responses Per Case = 5.9

Number of Cases with At Least One Response = 188

Response Percent = 100.0 %

 **Topic 2: Marketing Technology and AI**

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

	Number	Percent	Cumulative
0	22	11.8 %	11.8 %
1	1	0.5 %	12.3 %
2	3	1.6 %	13.9 %
3	2	1.1 %	15.0 %
5	13	7.0 %	21.9 %
10	28	15.0 %	36.9 %
15	19	10.2 %	47.1 %
20	24	12.8 %	59.9 %
25	17	9.1 %	69.0 %
30	17	9.1 %	78.1 %
35	5	2.7 %	80.7 %
40	12	6.4 %	87.2 %
45	2	1.1 %	88.2 %
50	10	5.3 %	93.6 %
60	4	2.1 %	95.7 %
75	2	1.1 %	96.8 %
80	5	2.7 %	99.5 %
100	1	0.5 %	100.0 %
Total	187	100.0 %	100.0 %

Mean = 22.42%

Minimum = 0

Maximum = 100

Median = 20

Standard Deviation (Unbiased Estimate) = 19.53

95 Percent Confidence Interval Around the Mean = 19.62 - 25.22

 **Topic 2: Marketing Technology and AI**

**Rate how well your company is managing the following challenges associated with using generative AI in marketing:**

	Mean	1=Not at all	2	3	4	5	6	7=Very effectively	Total
Implementing security measures to protect customer information	4.99	17 11.3%	5 3.3%	14 9.3%	15 9.9%	20 13.2%	36 23.8%	44 29.1%	151 100.0%
Ensuring that the marketing strategy that generative AI produces is a good fit for your brand	4.53	14 9.1%	12 7.8%	13 8.4%	28 18.2%	29 18.8%	42 27.3%	16 10.4%	154 100.0%
Ensuring that the marketing strategy that generative AI produces is a good fit for your target markets	4.37	13 8.4%	16 10.3%	14 9.0%	33 21.3%	28 18.1%	38 24.5%	13 8.4%	155 100.0%
Understanding how content or decisions are being made	4.37	12 7.7%	14 9.0%	15 9.6%	31 19.9%	42 26.9%	32 20.5%	10 6.4%	156 100.0%
Reducing susceptibility to attacks by malicious actors	4.30	24 15.7%	14 9.2%	12 7.8%	21 13.7%	30 19.6%	28 18.3%	24 15.7%	153 100.0%
Minimizing bias and ensuring fairness	3.83	26 16.7%	14 9.0%	20 12.8%	37 23.7%	25 16.0%	27 17.3%	7 4.5%	156 100.0%
Investing in hiring and building expertise necessary to use generative AI	3.65	23 15.3%	21 14.0%	29 19.3%	25 16.7%	27 18.0%	15 10.0%	10 6.7%	150 100.0%
Investing in hardware necessary for generative AI to work well	3.51	37 24.3%	17 11.2%	19 12.5%	26 17.1%	27 17.8%	16 10.5%	10 6.6%	152 100.0%



**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:**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Sales productivity	14.06%	16.92	11.41 - 16.72	10	0	80	156
Marketing overhead costs	14.64%	14.45	12.41 - 16.88	10	0	75	160
Customer satisfaction	10.75%	14.03	8.52 - 12.98	5	0	80	152



**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)**

	Mean & SD	1	2	3	4	5	Total
Having the right talent	2.47 1.37	71 34.5%	42 20.4%	39 18.9%	33 16.0%	21 10.2%	206 100.0%
Having the right operating model	2.88 1.34	40 19.4%	49 23.8%	42 20.4%	46 22.3%	29 14.1%	206 100.0%
Having all stakeholders aligned	2.89 1.43	46 22.3%	42 20.4%	49 23.8%	26 12.6%	43 20.9%	206 100.0%
Having the right data	3.08 1.30	31 15.0%	43 20.9%	42 20.4%	59 28.6%	31 15.0%	206 100.0%
Having the right technology	3.68 1.36	18 8.7%	30 14.6%	34 16.5%	42 20.4%	82 39.8%	206 100.0%



**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.**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products/services in existing markets	56.44%	24.3	53.2 - 59.7	57.5	0	100	217
New products/services in existing markets	22.89%	18.4	20.4 - 25.3	20	0	80	217
Existing products/services in new markets	14.14%	14.3	12.2 - 16.0	10	0	75	217
New products/services in new markets	6.53%	9.0	5.3 - 7.7	5	0	50	217



### Topic 3: Managing Growth

#### What is the underlying strategic rationale driving this spending allocation?

Top responses reflect the firms that over-index (20% more than the average) on the use of the specific strategy.

	EXISTING PRODUCTS/SERVICES	NEW PRODUCTS/SERVICES
EXISTING MARKETS	<p><b>Why Market Penetration?</b></p> <ul style="list-style-type: none"> <li>• <b>32.4%</b> Strategic Focus on Core Strengths: Leveraging deep expertise, established market knowledge, and proven capabilities.</li> <li>• <b>27.7%</b> Resource &amp; Financial Constraints: Managing limited resources, budget pressures, and need for immediate results.</li> <li>• <b>24.6%</b> Untapped Growth Opportunity: Significant runway from low market share or deepening customer relationships.</li> </ul>	<p><b>Why Offering Development?</b></p> <ul style="list-style-type: none"> <li>• <b>28.0%</b> Technology &amp; Digital Innovation: AI and digital capabilities creating new product opportunities.</li> <li>• <b>22.8%</b> Product Portfolio Momentum &amp; Relevance: Supporting recent launches and staying current with trends.</li> <li>• <b>21.1%</b> Customer Relationship Deepening: New products to increase retention and cross-selling to existing customers.</li> </ul>
NEW MARKETS	<p><b>Why Market Development?</b></p> <ul style="list-style-type: none"> <li>• <b>30.5%</b> Account Expansion &amp; Revenue Growth: Growing revenue from existing clients.</li> <li>• <b>22.1%</b> Geographic Market Expansion: Taking proven products into new regions, territories, or channels.</li> <li>• <b>20.4%</b> Testing &amp; Validation Before Scale: Proving success and building brand awareness before heavy investment.</li> </ul>	<p><b>Why Diversification?</b></p> <ul style="list-style-type: none"> <li>• <b>42.4%</b> Portfolio Management &amp; Balanced Growth: Strategic balance across all quadrants with new and existing customers.</li> <li>• <b>19.8%</b> Growth Stage &amp; Business Model Factors: Structural factors like growth stage, franchise models, or diverse needs.</li> <li>• <b>16.6%</b> Capability &amp; Business Model Evolution: Building AI capabilities and transforming business models.</li> <li>• <b>10.6%</b> Strategic Growth Experimentation: Testing multiple options through controlled experiments.</li> <li>• <b>10.6%</b> Market Leadership Imperatives: Leaders must invest across all dimensions to defend position.</li> </ul>



### Topic 3: Managing Growth

#### **When pursuing growth opportunities, how often do the following behaviors occur in your company?**

	Majority of time	Minority of time	Total
Effectively leveraging technology to pursue growth opportunities.	121 56.5%	93 43.5%	214 100.0%
Using an integrated marketing team in which marketing and finance experts work together	108 49.5%	110 50.5%	218 100.0%
Marketing offers a strong interpretation of customer insights important to the growth opportunity	154 70.6%	64 29.4%	218 100.0%
Marketing is able to connect the growth strategy to relevant customer metrics	155 71.4%	62 28.6%	217 100.0%
Marketing builds a business case for the growth strategy	146 67.6%	70 32.4%	216 100.0%



**Topic 3: Managing Growth**

**What percent of your company's sales is domestic?**

Mean = 81.60%

Minimum = 36.92

Maximum = 100

Median = 90

Standard Deviation (Unbiased Estimate) = 20.35

95 Percent Confidence Interval Around the Mean = 78.90 - 84.31

Valid Cases = 217

Missing Cases = 91

Response Percent = 70.5%



**Topic 3: Managing Growth**

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

Mean = 83.88%

Minimum = 34.24

Maximum = 100

Median = 95

Standard Deviation (Unbiased Estimate) = 21.90

95 Percent Confidence Interval Around the Mean = 80.96 - 86.80

Valid Cases = 216

Missing Cases = 92

Response Percent = 70.1%



### Topic 3: Managing Growth

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

	Number	Percent	95% CI
Western Europe	26	22.0 %	± 6.3 %
China	13	11.0 %	± 4.7 %
Africa (non-Middle East and South Africa)	10	8.5 %	± 4.1 %
Eastern Europe	9	7.6 %	± 3.9 %
Middle East	8	6.8 %	± 3.7 %
Canada	8	6.8 %	± 3.7 %
South American countries besides Brazil	8	6.8 %	± 3.7 %
Australia/New Zealand	8	6.8 %	± 3.7 %
Brazil	6	5.1 %	± 3.2 %
Japan	6	5.1 %	± 3.2 %
Central America	4	3.4 %	± 2.7 %
Mexico	4	3.4 %	± 2.7 %
India	3	2.5 %	± 2.3 %
Indonesia and Southeast Asia	2	1.7 %	± 1.9 %
Scandinavia	1	0.8 %	± 1.4 %
Korea	1	0.8 %	± 1.4 %
Russia	1	0.8 %	± 1.4 %
Total	118	100.0 %	

Missing Cases = 29

Response Percent = 80.3 %


**Topic 4: Marketing Capabilities**
**How important is developing agility to the success of your marketing organization? (select the best description)**

	Number	Percent	95% CI
Agility is key to our success	125	71.0 %	± 5.5 %
Agility is moderately important to our success	44	25.0 %	± 3.9 %
Agility is not very important to our success	7	4.0 %	± 1.7 %
Total	176	100.0 %	

Missing Cases = 132

Response Percent = 57.1 %

 **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:**

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very well	Total
Sense emerging opportunities and threats in the marketplace	4.89 1.34	2 1.2%	8 5.0%	16 9.9%	25 15.5%	51 31.7%	47 29.2%	12 7.5%	161 100.0%
Sense emerging challenges with current marketing actions	4.96 1.36	3 1.9%	7 4.3%	15 9.3%	20 12.4%	54 33.5%	47 29.2%	15 9.3%	161 100.0%
Revise marketing priorities in response to change	5.49 1.32	2 1.2%	3 1.9%	6 3.7%	21 13.0%	43 26.5%	45 27.8%	42 25.9%	162 100.0%
Shift marketing resources in response to change	5.19 1.24	0 0.0%	1 2.1%	4 8.5%	8 17.0%	12 25.5%	16 34.0%	6 12.8%	47 100.0%
Build capabilities that facilitate agile marketing actions	4.81 1.38	3 1.9%	7 4.3%	18 11.2%	32 19.9%	44 27.3%	44 27.3%	13 8.1%	161 100.0%

 **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)**

	Mean	SD	95% CI	Median	Min	Max	Total
We build new marketing capabilities ourselves by training current or hiring new employees with the skills	59.52	29.55	54.97 - 64.07	70	0	100	162
We partner with other marketing agencies to learn new marketing skills	15.48	19.37	12.50 - 18.46	10	0	100	162
We partner with other companies to learn new marketing skills	12.66	15.80	10.23 - 15.09	10	0	80	162
We partner with other consultancies to learn new marketing skills	10.39	15.25	8.04 - 12.74	5	0	100	162
We buy other companies to acquire new marketing skills	1.94	6.24	0.98 - 2.90	0	0	50	162

 **Topic 4: Marketing Capabilities**

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

	Mean & SD	1=Not very important	2	3	4=Moderately important	5	6	7=Very important	Total
How important are your company's marketing capabilities to the success of your business?	5.92 1.10	0 0.0%	0 0.0%	4 2.3%	18 10.5%	32 18.7%	51 29.8%	66 38.6%	171 100.0%



**Topic 4: Marketing Capabilities**

**Why are marketing capabilities important to your business?**

	Number	Percent	95% CI
Get higher ROI for every marketing dollar spent	129	78.2 %	± 6.4 %
Increase the speed of marketing actions	108	65.5 %	± 7.3 %
Increase the effectiveness of managing customers	86	52.1 %	± 7.7 %
Show our marketing strength to potential or current partners	69	41.8 %	± 7.6 %
Difficult for competitors to imitate marketing strategies	61	37.0 %	± 7.4 %
Attract or retain top managers and employees	55	33.3 %	± 7.3 %
Total	508		

Number of Cases = 165

Number of Responses = 508

Average Number of Responses Per Case = 3.1

Number of Cases with at least One Response = 165

Response Percent = 100.0 %



## Topic 4: Marketing Capabilities

### What marketing capabilities are most lacking in your organization?

This open-ended question was coded into categories for analysis. Interestingly, the most common response was not a specific capability, but the resourcing of current capabilities with talent, time, and financial resources.

	Number	Percent
Capability is not resourced with employees, time, and \$	25	22.3%
Analytics, data science, and related AI	16	14.3%
Learning about and adopting AI into processes	16	14.3%
Marketing technology capabilities: selection and integration of stacks and systems	15	13.4%
Product and brand strategy	14	12.5%
Managing GenAI, GEO, and Bots	13	11.6%
Marketing ROI and attribution	12	10.7%
Insights	11	9.8%
Demand generation and AI	11	9.8%
Channel and partner management	7	6.3%
Long-term management of marketing	6	5.4%
Social media (including content and influencers)	6	5.4%
Direct to consumer skills	2	1.8%
Total	112	100%


**Topic 5: Marketing Leadership**
**What is marketing primarily responsible for in your company?**

	Number	Percent	95% CI
Brand	238	94.4 %	± 2.9 %
Digital marketing	235	93.3 %	± 3.1 %
Advertising	219	86.9 %	± 4.2 %
Social media	210	83.3 %	± 4.6 %
Marketing analytics	198	78.6 %	± 5.1 %
Positioning	193	76.6 %	± 5.3 %
Marketing research	186	73.8 %	± 5.5 %
Public relations	182	72.2 %	± 5.6 %
Promotion	176	69.8 %	± 5.7 %
Lead generation	169	67.1 %	± 5.8 %
Marketing technology	165	65.5 %	± 5.9 %
Customer Insight	143	56.7 %	± 6.2 %
Competitive intelligence	135	53.6 %	± 6.2 %
Revenue growth	107	42.5 %	± 6.1 %
Customer experience	101	40.1 %	± 6.1 %
Market entry strategies	93	36.9 %	± 6.0 %
e-commerce	85	33.7 %	± 5.9 %
New products or new services	83	32.9 %	± 5.8 %
Customer relationship management	77	30.6 %	± 5.7 %
Pricing	71	28.2 %	± 5.6 %
Innovation	70	27.8 %	± 5.6 %
Market selection	49	19.4 %	± 4.9 %
Sales	49	19.4 %	± 4.9 %
Talent acquisition and retention	39	15.5 %	± 4.5 %
Customer service	32	12.7 %	± 4.1 %
Privacy	23	9.1 %	± 3.6 %
Distribution	19	7.5 %	± 3.3 %
Sustainability	17	6.7 %	± 3.1 %
Stock market performance	5	2.0 %	± 1.7 %
Total	3369		

Number of Cases = 252

Number of Responses = 3369

Average Number of Responses Per Case = 13.4

Number of Cases with at least One Response = 252

Response Percent = 100.0 %

 **Topic 5: Marketing Leadership**

**Rate how well marketing works with these different functions to drive enterprise growth:**

	Mean & SD	1= Poorly	2	3	4	5	6	7=Very well	Total
Sales/distribution and marketing work closely together to drive growth	5.79 1.10	0 0.0%	3 1.2%	7 2.8%	18 7.2%	55 22.1%	95 38.2%	71 28.5%	249 100.0%
IT/digital and marketing work closely together to drive growth	5.09 1.43	5 2.0%	7 2.8%	21 8.4%	48 19.2%	57 22.8%	70 28.0%	42 16.8%	250 100.0%
Operations/production and marketing work closely together to drive growth	4.96 1.33	4 1.6%	6 2.4%	26 10.4%	45 17.9%	79 31.5%	62 24.7%	29 11.6%	251 100.0%
Finance and marketing work closely together to drive growth	4.78 1.49	3 1.2%	22 8.8%	23 9.2%	53 21.3%	54 21.7%	67 26.9%	27 10.8%	249 100.0%
Human resources and marketing work closely together to drive growth	4.44 1.77	12 4.9%	33 13.4%	31 12.6%	47 19.0%	42 17.0%	47 19.0%	35 14.2%	247 100.0%



## Topic 5: Marketing Leadership

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

	Number	Percent	95% CI
Develop stronger marketing performance tracking	214	86.3 %	± 4.3 %
Demonstrate the financial impact of marketing	186	75.0 %	± 5.4 %
Demonstrate the value of brand and customer relationships	167	67.3 %	± 5.9 %
Collect competitor data	146	58.9 %	± 6.2 %
Run experiments	143	57.7 %	± 6.2 %
Collect customer data	135	54.4 %	± 6.2 %
Offer novel customer insights	125	50.4 %	± 6.3 %
Total	1116		

Number of Cases = 248

Number of Responses = 1116

Average Number of Responses Per Case = 4.5

Number of Cases with at least One Response = 248

Response Percent = 100.0%



**Topic 5: Marketing Leadership**

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

	Yes	No	Total
CEO	141 58.8%	99 41.3%	240 100.0%
Board	34 44.7%	42 55.3%	76 100.0%
CFO	132 55.5%	106 44.5%	238 100.0%


**Topic 5: Marketing Leadership**
**How does marketing cope with this increased pressure?**

	Number	Percent	95% CI
Focus on short-term impact over long-run gains	108	70.6 %	± 7.3 %
Return to established marketing strategies	72	47.1 %	± 8.0 %
Emphasize spending over building capabilities	41	26.8 %	± 7.1 %
Limit the ambition of marketing's goals	39	25.5 %	± 7.0 %
Total	260		

Number of Cases = 153

Number of Responses = 260

Average Number of Responses Per Case = 1.7

Number of Cases with at least One Response = 153

Response Percent = 100.0 %



**Topic 5: Marketing Leadership**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Managing the present	68.20%	17.13	66.08 - 70.33	70	10	100	249
Preparing for the future	31.80%	17.13	29.67 - 33.92	30	0	90	249

 **Topic 5: Marketing Leadership**

**How often is your senior marketing leader asked by the CEO or CFO to participate in board meetings and earnings calls? (reported only for public companies)**

	Mean & SD	1=Never	2	3	4=Some of the time	5	6	7=All the time	Total
Board meetings	4.55 2.12	9 11.3%	9 11.3%	9 11.3%	11 13.8%	8 10.0%	12 15.0%	22 27.5%	80 100.0%
Preparation for earnings calls	4.62 2.33	14 17.7%	8 10.1%	4 5.1%	7 8.9%	7 8.9%	13 16.5%	26 32.9%	79 100.0%



**Topic 5: Marketing Leadership**

**To what extent is marketing viewed as a core business function in your organization?**

	Mean	1=Not at all	2	3	4	5	6	7=Very often	Total
To what extent is marketing viewed as a core business function in your organization?	5.52	0	9	16	26	61	60	78	250
	1.38	0.0%	3.6%	6.4%	10.4%	24.4%	24.0%	31.2%	100.0%



**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?**

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Likely	Total
The CFO works as a business partner with marketing leaders to build a business case for marketing spending	4.48 1.85	20 8.1%	29 11.7%	24 9.7%	39 15.7%	49 19.8%	50 20.2%	37 14.9%	24 100.0%



**Topic 6: Marketing Spending**

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

Mean = 9.64%

Minimum = 0.00

Maximum = 27.33

Median = 7

Standard Deviation (Unbiased Estimate) = 7.74

95 Percent Confidence Interval Around the Mean = 8.38 - 10.89

Valid Cases = 146

Missing Cases = 162

Response Percent = 47.4%



**Topic 6: Marketing Spending**

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

Mean = 8.96%

Minimum = 0

Maximum = 42.99

Median = 5

Standard Deviation (Unbiased Estimate) = 11.45

95 Percent Confidence Interval Around the Mean = 7.15 - 10.76

Valid Cases = 154

Missing Cases = 154

Response Percent = 50.0%



**Topic 6: Marketing Spending**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	1.74%	15.40	-0.62 - 4.11	0	-36	41.41	163
Digital marketing spending	8.20%	22.46	4.72 - 11.68	5	-50	100	160



## 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%).**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	10.40%	15.08	8.02 - 12.78	10	-24.75	47.38	154
Overall marketing spending	7.61%	15.72	5.13 - 10.09	5	-31.37	49.29	154
Brand building	5.87%	14.72	3.48 - 8.25	1	-32.86	46.29	146
New product introductions	5.85%	9.74	4.27 - 7.43	2	-19.15	32.37	146
Customer relationship management	3.50%	7.69	2.23 - 4.76	0	-16.52	24.54	142
New service introductions	3.17%	6.20	2.14 - 4.21	0	-13.43	21.05	138
Customer experience spending	3.03%	6.89	1.89 - 4.17	0	-14.11	20.57	141
Traditional advertising spending	-1.50%	13.33	-3.68 - 0.68	0	-39.15	37.11	144

 **Topic 6: Marketing Spending**

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

	Mean	SD	95% CI	Median	Total
What percent of your marketing budget do you currently spend on social media?	14.25%	12.50	12.33 - 16.17	10	163
What percent will you spend on social media in the next 12 months?	17.06%	13.30	15.01 - 19.10	15	163
What percent will you spend on social media in the next five years?	23.06%	15.70	20.63 - 25.48	20	161



## Topic 6: Marketing Spending

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

	Number	Percent	95% CI
70% Retention budget is 70%+ larger than the Acquisition budget	3	1.8 %	± 1.1 %
60%	2	1.2 %	± 0.9 %
50%	3	1.9 %	± 1.1 %
40%	0	0.0 %	± 0.0 %
30%	7	4.3 %	± 1.7 %
20%	9	5.6 %	± 1.9 %
10%	4	2.5 %	± 1.3 %
5%	1	0.6 %	± 0.6 %
0% Retention and Acquisition budgets are equal	26	16.0 %	± 3.1 %
-5%	0	0.0 %	± 0.0 %
-10%	2	1.2 %	± 0.9 %
-20%	19	11.7 %	± 2.7 %
-30%	14	8.6 %	± 2.3 %
-40%	9	5.6 %	± 1.9 %
-50%	16	9.9 %	± 2.5 %
-60%	15	9.3 %	± 2.4 %
-70% Acquisition budget is 70%+ larger than the Retention budget	32	19.8 %	± 3.4 %
Total	162	100.0 %	

Mean = -25.96%: The Acquisition budget is 25.96% larger than the Retention budget

SD = 36.64

Percent of Companies:

- Acquisition budget is larger than the Retention budget = 66.10%
- Retention budget is larger than the Acquisition budget = 17.90%
- The budgets are equal = 16.00%

Missing Cases = 146

Response Percent = 52.6 %

\*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?**

	Number	Percent	95% CI
70% Marketing budget is 70%+ larger than R&D budget	22	14.0 %	± 2.9 %
60%	3	1.9 %	± 1.1 %
50%	5	3.2 %	± 1.4 %
40%	11	7.1 %	± 2.1 %
30%	9	5.8 %	± 1.9 %
20%	5	3.2 %	± 1.4 %
10%	4	2.6 %	± 1.3 %
5%	2	1.3 %	± 0.9 %
0% The Marketing and R&D budgets are equal	13	8.3 %	± 2.3 %
-5%	2	1.3 %	± 0.9 %
-10%	4	2.6 %	± 1.3 %
-20%	13	8.3 %	± 2.3 %
-30%	8	5.1 %	± 1.8 %
-40%	7	4.5 %	± 1.7 %
-50%	14	9.0 %	± 2.4 %
-60%	10	6.4 %	± 2.0 %
-70% R&D budget is 70% larger than Marketing budget	24	15.4 %	± 3.0 %
Total	156	100.0 %	

Mean = -6.28%: The Marketing budget is 6.28% smaller than the R&D budget  
SD = 48.58

Percent of Companies:

- R&D budget is larger than Marketing budget = 52.6%
- Marketing budget is larger than R&D budget = 39.1%
- The budgets are equal = 8.3%

Missing Cases = 152

Response Percent = 50.6 %

\*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?\***

	Number	Percent	95% CI
100% Growing Revenues is the priority	6	3.7 %	± 1.6 %
90%	1	0.6 %	± 0.6 %
80%	3	1.8 %	± 1.1 %
70%	4	2.4 %	± 1.3 %
60%	3	1.8 %	± 1.1 %
50%	8	4.9 %	± 1.8 %
40%	7	4.3 %	± 1.7 %
30%	4	2.4 %	± 1.3 %
20%	5	3.1 %	± 1.4 %
10%	3	1.8 %	± 1.1 %
5%	0	0.0 %	± 0.0 %
0% Priorities are equal	33	20.1 %	± 3.5 %
-5%	0	0.0 %	± 0.0 %
-10%	4	2.4 %	± 1.3 %
-20%	5	3.1 %	± 1.4 %
-30%	15	9.1 %	± 2.4 %
-40%	6	3.7 %	± 1.6 %
-50%	6	3.7 %	± 1.6 %
-60%	8	4.9 %	± 1.8 %
-70%	10	6.1 %	± 2.0 %
-80%	12	7.3 %	± 2.2 %
-90%	8	4.9 %	± 1.8 %
-100% Cutting Expenses is the priority	13	7.9 %	± 2.3 %
<b>Total</b>	<b>164</b>	<b>100.0 %</b>	

**Percent of Companies:**

- Cutting Expenses is the priority = 53.1%
- Growing Revenues is the priority = 26.8%
- Priorities are equal = 20.1%

Mean = -18.11

SD = 54.88

Missing Cases = 144

Response Percent = 53.2 %

\*Positive (negative) numbers mean that the growing revenues (cutting expenses) is the percentage x% of the time. 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 and the focus is on cutting expenses, how often do company executives cut marketing expenses over other areas? (% of the time cut marketing)**

Mean = 45.42%

Minimum = 0

Maximum = 100

Median = 50

Standard Deviation (Unbiased Estimate) = 37.21

95 Percent Confidence Interval Around the Mean = 39.65 - 51.18

Valid Cases = 160

Missing Cases = 148

Response Percent = 51.9%



## Topic 7: Marketing Jobs

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

Mean = 2.49%

Minimum = -100

Maximum = 100

Median = 0

Standard Deviation (Unbiased Estimate) = 25.87

95 Percent Confidence Interval Around the Mean = -1.40 - 6.38

Valid Cases = 170

Missing Cases = 138

Response Percent = 55.2%



## 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?**

Mean = 2.64%

Minimum = -22.11

Maximum = 28.90

Median = 0

Standard Deviation (Unbiased Estimate) = 9.08

95 Percent Confidence Interval Around the Mean = 1.27 - 4.02

Valid Cases = 168

Missing Cases = 140

Response Percent = 54.5%



## Topic 7: Marketing Jobs

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

Mean = 3.80%

Minimum = 0

Maximum = 12.38

Median = 3

Standard Deviation (Unbiased Estimate) = 3.77

95 Percent Confidence Interval Around the Mean = 3.22 - 4.39

Valid Cases = 161

Missing Cases = 147

Response Percent = 52.3%



**Topic 8: Marketing Channels**

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

	Number	Percent	95% CI
Uses channel partners	214	69.5 %	± 5.2 %
Does not use channel partners	94	30.5 %	± 5.2 %
Total	308	100.0 %	

Missing Cases = 0

Response Percent = 100.0%


**Topic 8: Marketing Channels**
**Which statements reflect how your channel strategy has changed over the last three years?**

	Number	Percent	95% CI
We increased the number of channels we use	95	57.6 %	± 7.6 %
We are opening new digital channels	79	47.9 %	± 7.7 %
We are using our social channels to sell more of our products and services	64	38.8 %	± 7.5 %
We are opening new face-to-face channels	50	30.3 %	± 7.1 %
We are using more retail media (brand advertising on online retail sites) to sell our products and services	39	23.6 %	± 6.6 %
We added a direct-to-consumer/customer channel of any type	33	20.0 %	± 6.2 %
We decreased the number of channels we use	11	6.7 %	± 3.9 %
Our former face-to-face channels have all become digital	7	4.2 %	± 3.1 %
Total	378		

Number of Cases = 165

Number of Responses = 378

Average Number of Responses Per Case = 2.3

Number of Cases with at least One Response = 165

Response Percent = 100.0 %



**Topic 8: Marketing Channels**

**What percent of your sales occur online? - Average levels**

Mean = 13.26%

Minimum = 0

Maximum = 68.56

Median = 2

Standard Deviation (Unbiased Estimate) = 21.16

95 Percent Confidence Interval Around the Mean = 10.82 - 15.69

Valid Cases = 290

Missing Cases = 18

Response Percent = 94.2%

**What percent of your sales occur online? – Quintiles**

	Number	Percent	95% CI
0%	120	41.4 %	± 5.5 %
1-10%	85	29.3 %	± 5.0 %
11-49%	50	17.2 %	± 4.1 %
50-99%	23	7.9 %	± 3.0 %
100%	12	4.1 %	± 2.2 %
Total	290	100.0 %	

Missing Cases = 18

Response Percent = 94.2%

 **Topic 9: Marketing Performance**

**Rate your company's performance during the prior 12 months: Sales Revenue**

	Number	Percent	Cumulative
-75%	1	0.6 %	0.6 %
-50%	0	0.0 %	0.6 %
-40%	1	0.6 %	1.3 %
-30%	1	0.6 %	1.9 %
-20%	9	5.7 %	7.6 %
-10%	7	4.4 %	12.0 %
-7%	5	3.2 %	15.2 %
-5%	3	1.9 %	17.1 %
-3%	4	2.5 %	19.6 %
-1%	1	0.6 %	20.3 %
0	13	8.2 %	28.5 %
+1%	4	2.5 %	31.0 %
+3%	12	7.6 %	38.6 %
+5%	19	12.0 %	50.6 %
+7%	12	7.6 %	58.2 %
+10%	27	17.1 %	75.3 %
+20%	16	10.1 %	85.4 %
+30%	11	7.0 %	92.4 %
+40%	4	2.5 %	94.9 %
+50%	2	1.3 %	96.2 %
+75%	6	3.8 %	100.0 %
Total	158	100.0 %	100.0 %

Mean = 8.80%  
SD = 20.48

Missing Cases = 150  
Response Percent = 51.3 %

 **Topic 9: Marketing Performance**

**Rate your company's performance during the prior 12 months: Profits**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	4	2.6 %	2.6 %
-20%	8	5.2 %	7.7 %
-10%	12	7.7 %	15.5 %
-7%	1	0.6 %	16.1 %
-5%	4	2.6 %	18.7 %
-3%	3	1.9 %	20.6 %
-1%	4	2.6 %	23.2 %
0	18	11.6 %	34.8 %
+1%	7	4.5 %	39.4 %
+3%	16	10.3 %	49.7 %
+5%	18	11.6 %	61.3 %
+7%	11	7.1 %	68.4 %
+10%	17	11.0 %	79.4 %
+20%	9	5.8 %	85.2 %
+30%	11	7.1 %	92.3 %
+40%	4	2.6 %	94.8 %
+50%	6	3.9 %	98.7 %
+75%	2	1.3 %	100.0 %
Total	155	100.0 %	100.0 %

Mean = 6.92%  
SD = 17.97

Missing Cases = 153  
Response Percent = 50.3 %

 **Topic 9: Marketing Performance**

**Rate your company's performance during the prior 12 months: Customer Acquisition**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	2	1.3 %	1.3 %
-20%	3	1.9 %	3.2 %
-10%	9	5.8 %	9.1 %
-7%	1	0.6 %	9.7 %
-5%	8	5.2 %	14.9 %
-3%	1	0.6 %	15.6 %
-1%	3	1.9 %	17.5 %
0	16	10.4 %	27.9 %
+1%	6	3.9 %	31.8 %
+3%	17	11.0 %	42.9 %
+5%	25	16.2 %	59.1 %
+7%	7	4.5 %	63.6 %
+10%	28	18.2 %	81.8 %
+20%	12	7.8 %	89.6 %
+30%	10	6.5 %	96.1 %
+40%	3	1.9 %	98.1 %
+50%	0	0.0 %	98.1 %
+75%	3	1.9 %	100.0 %
Total	154	100.0 %	100.0 %

Mean = 7.36%  
SD = 15.17

Missing Cases = 154  
Response Percent = 50.0 %



**Topic 9: Marketing Performance**

**Rate your company's performance during the prior 12 months: Customer Retention**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	0	0.0 %	0.0 %
-30%	0	0.0 %	0.0 %
-20%	4	2.6 %	2.6 %
-10%	15	9.7 %	12.3 %
-7%	1	0.6 %	13.0 %
-5%	4	2.6 %	15.6 %
-3%	10	6.5 %	22.1 %
-1%	4	2.6 %	24.7 %
0	35	22.7 %	47.4 %
+1%	10	6.5 %	53.9 %
+3%	8	5.2 %	59.1 %
+5%	14	9.1 %	68.2 %
+7%	5	3.2 %	71.4 %
+10%	11	7.1 %	78.6 %
+20%	4	2.6 %	81.2 %
+30%	1	0.6 %	81.8 %
+40%	4	2.6 %	84.4 %
+50%	2	1.3 %	85.7 %
+75%	22	14.3 %	100.0 %
Total	154	100.0 %	100.0 %

Mean = 12.84%  
SD = 27.70

Missing Cases = 154  
Response Percent = 50.0 %



**Topic 9: Marketing Performance**

**Rate your company's performance during the prior 12 months: Brand Value**

	Number	Percent	Cumulative
-75%	0	0.0 %	0.0 %
-50%	0	0.0 %	0.0 %
-40%	1	0.6 %	0.6 %
-30%	0	0.0 %	0.6 %
-20%	2	1.3 %	1.9 %
-10%	6	3.9 %	5.8 %
-7%	0	0.0 %	5.8 %
-5%	3	1.9 %	7.7 %
-3%	4	2.6 %	10.3 %
-1%	3	1.9 %	12.3 %
0	43	27.7 %	40.0 %
+1%	3	1.9 %	41.9 %
+3%	8	5.2 %	47.1 %
+5%	21	13.5 %	60.6 %
+7%	1	0.6 %	61.3 %
+10%	22	14.2 %	75.5 %
+20%	20	12.9 %	88.4 %
+30%	5	3.2 %	91.6 %
+40%	2	1.3 %	92.9 %
+50%	4	2.6 %	95.5 %
+75%	7	4.5 %	100.0 %
Total	155	100.0 %	100.0 %

Mean = 9.96%  
SD = 19.01

Missing Cases = 153  
Response Percent = 50.3 %

 **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:**

	Number	Percent	Cumulative
An hour	1	0.6 %	0.6 %
12 hours	1	0.6 %	1.3 %
A day	2	1.3 %	2.6 %
A week	4	2.6 %	5.1 %
A month	10	6.4 %	11.5 %
Several months	38	24.4 %	35.9 %
6 months	16	10.3 %	46.2 %
1 year	34	21.8 %	67.9 %
2 years	29	18.6 %	86.5 %
5 years	14	9.0 %	95.5 %
7 years	0	0.0 %	95.5 %
10 years or more	7	4.5 %	100.0 %
Total	156	100.0 %	100.0 %

Median impact: 6 months

Modal impact: Several months

Missing Cases = 152

Response Percent = 50.6 %

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

	Number	Percent	95% CI
B2B - Product	121	39.5 %	± 5.5 %
B2B - Services	78	25.5 %	± 4.9 %
B2C - Product	72	23.5 %	± 4.8 %
B2C - Services	35	11.4 %	± 3.6 %
Total	306	100.0 %	

Missing Cases = 2

Response Percent = 99.4 %


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

	Number	Percent	95% CI
Tech Software Platform	62	20.4 %	± 4.5 %
Banking Finance Insurance	37	12.2 %	± 3.7 %
Healthcare	32	10.5 %	± 3.4 %
Manufacturing	29	9.5 %	± 3.3 %
Consumer Packaged Goods	28	9.2 %	± 3.2 %
Professional Services	23	7.6 %	± 3.0 %
Retail/Wholesale	19	6.3 %	± 2.7 %
Pharma Biotech	15	4.9 %	± 2.4 %
Communications Media	13	4.3 %	± 2.3 %
Transportation	10	3.3 %	± 2.0 %
Energy	9	3.0 %	± 1.9 %
Consumer Services	9	3.0 %	± 1.9 %
Education	7	2.3 %	± 1.7 %
Real Estate	7	2.3 %	± 1.7 %
Mining Construction	4	1.3 %	± 1.3 %
Total	304	100.0 %	

Missing Cases = 4

Response Percent = 98.7 %

 **Appendix: Company-level Descriptive Information**

**How many employees are in your company?**

<u>Number of Employees</u>	<u>Number</u>	<u>Percent</u>	<u>95% CI</u>
<50	44	14.3 %	± 3.9 %
50-99	27	8.8 %	± 3.2 %
100-499	56	18.2 %	± 4.3 %
500-999	31	10.1 %	± 3.4 %
1,000-2,499	39	12.7 %	± 3.7 %
2,500-4,999	29	9.4 %	± 3.3 %
5000-9999	20	6.5 %	± 2.8 %
10,000+	61	19.9 %	± 4.5 %
Total	307	100.0 %	

Missing Cases = 1

Response Percent = 99.7 %


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

	Number	Percent	Cumulative
Less than \$10 million	39	13.0 %	13.0 %
\$10-25 million	24	8.0 %	21.1 %
\$26-99 million	33	11.0 %	32.1 %
\$100-499 million	61	20.4 %	52.5 %
\$500-999 million	23	7.7 %	60.2 %
\$1-2.5 billion	32	10.7 %	70.9 %
\$2.6-5 billion	22	7.4 %	78.3 %
\$5.1-9.9 billion	23	7.7 %	86.0 %
\$10-49 billion	23	7.7 %	93.6 %
More than \$50+ billion	19	6.4 %	100.0 %
Total	299	100.0 %	100.0 %

Missing Cases = 9

Response Percent = 97.1 %

 **Appendix: Company-level Descriptive Information**

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

	Number	Percent	95% CI
Yes	117	38.2 %	± 5.5 %
No	189	61.8 %	± 5.5 %
Total	306	100.0 %	

Missing Cases = 2

Response Percent = 99.4 %

# The CMO Survey<sup>®</sup>



Next Survey: January 2027

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