

TOPLINE RESULTS

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Survey Partners



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Table of Contents

Topic 1: Marketplace Dynamics

Overall Economy and Company

- 1 Are you more or less optimistic about the U.S. economy compared to last quarter?
- 2 Rate your optimism about the U.S. economy on a scale from 0-100 with 0 being the least optimistic.
- 3 Are you more or less optimistic about your own company compared to last quarter?
- 4 Rate your optimism about your company on a scale from 0-100 with 0 being the least optimistic.

Customers

- 5 Are you more or less optimistic about your prospects for revenue growth compared to the prior 12 months?
- 6 Rate your optimism about your prospects for sales revenue growth on a scale from 0-100 with 0 being the least optimistic.
- 7 Rank your customers' top three priorities (1, 2, 3) over the next 12 months, where 1 is most important.

Competitors

- 8 Predict the likelihood of the following competitor interactions over the next 12 months.

Channel Partners

- 9 Will you use a channel or go directly to market?
- 10 Focusing on your firm's channel partnerships in this market, are you more or less optimistic about your prospects for revenue growth compared to prior 12 months?
- 11 Do you expect the following channel partner outcomes for your firm to change in the next 12 months?

Topic 2: Firm Growth Strategies

- 12 Allocate 100 points to reflect your firm's spending on growth strategies during the prior 12 months.
- 13 Allocate 100 points to reflect your firm's spending on growth strategies during the next 12 months
- 14 Allocate 100 points to reflect how your firm will grow during the next 12 months.
- 15 What percentage of your firm's sales is domestic? Through the internet?
- 16 Which international market is your highest revenue growth market?
- 17 Considering this market, by what percent did your sales increase in the prior 12 months? (reported in aggregate)
- 18 Considering this market, by what percent did your sales increase in the last 12 months? (reported by market)

Topic 3: Marketing Spending

- 19 What is your company's percentage change in marketing spending during the next 12 months?
- 21 What percentage of your firm's overall budget does marketing currently account for?
- 22 Marketing expenses account for what percent of your firm's revenues?
- 23 Which best describes how your company shows the short-term impact of marketing spend on your business?
- 24 Which best describes how your company shows the long-term impact of marketing spend on your business?

Topic 4: Financial and Marketing Performance

- 25 Rate your firm's performance during the last 12 months
- 26 What is your firm's goal for the next 12 months?
- 27 Rate your company's marketing excellence.
- 28 Rate your firm on each social and environmental metric during the last 12 months.

Topic 5: [Social Media](#)

- [29](#) What percent of your marketing budget do you currently spend on social media?
- [29](#) What percent of your marketing budget will you spend on social media in the next 12 months?
- [29](#) What percent of your marketing budget will you spend on social media in the next five years?
- [30](#) In-house vs. outsourcing of social media activities
- [31](#) How effectively is social media integrated with your firm's marketing strategy?
- [32](#) How effectively does your company integrate customer information across channels?
- [33](#) Which best describes how you show the impact of social media on your business?
- [34](#) Does your company use customer behavior data collected online for targeting purposes?
- [35](#) Is your company's use of online customer behavior data increasing, decreasing, or staying the same over time?
- [36](#) How worried are you that this use of online customer data could raise questions about privacy?

Topic 6: [Marketing Jobs](#)

- [37](#) Percentage change in marketing hires in next 12 months.
- [38](#) Percentage change in outsourcing of marketing activities in next 12 months.

Topic 7: [Marketing Organization](#)

- [39](#) Number of employees? Marketing employees?
- [40](#) Which organizational structure is most common in your firm—product/service groups or customer groups?
- [41](#) Rate the extent to which your firm engages in the following market-oriented behaviors.

Topic 8: [Marketing Leadership](#)

- [42](#) What is marketing primarily responsible for in your firm?
- [43](#) How many reports do you have? Indirect reports?
- [44](#) How many years have you been with this firm in your current role? In any role?
- [45](#) Do you feel pressure from your CEO or Board to prove the value of marketing?
- [46](#) Is this pressure increasing, decreasing, or about the same?

Topic 9: [Marketing Analytics](#)

- [47](#) What percent of your marketing budget do you spend on marketing analytics?
- [48](#) Percentage of projects using marketing analytics before a decision is made?
- [49](#) Does your company formally evaluate the quality of marketing analytics?
- [50](#) To what degree has the use of marketing analytics contributed to your company's performance?
- [51](#) To what degree is your company leveraging marketing analytics to answer its most challenging marketing questions?
- [52](#) To what extent does your company have the right talent to fully leverage marketing analytics?
- [53](#) Have you added analytics talent to your marketing organization in the last year?
- [54](#) How challenging was it to find the right talent?
- [55](#) Check all of the areas in which you are using marketing analytics to drive decision making.

Appendix: [Firm-level Descriptive Information](#)

- [56](#) Which economic sector best describes your firm?
- [57](#) What is your firm's ownership structure?
- [58](#) What was your firm's sales revenue in last 12 months?
- [59](#) Which industry sector best describes your firm?

Topic 1: Marketplace Dynamics - Overall Economy and Company**Are you more or less optimistic about the U.S. economy compared to last quarter?**

	Number	Percent	95% CI
3=More	202	49.5 %	± 4.9 %
2=No Change	152	37.3 %	± 4.7 %
1=Less	54	13.2 %	± 3.3 %
Total	408	100.0 %	

Mean = 2.4

SD = 0.7

Missing Cases = 2

Response Percent = 99.5 %

Topic 1: Marketplace Dynamics - Overall Economy and Company

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

Minimum = 36

Maximum = 95

Mean = 65.7

Median = 70

Standard Deviation (Unbiased) = 14.0

95 Percent Confidence Interval Around The Mean = 64.3 - 67.0

Quartiles

1 = 55

2 = 70

3 = 75

Valid Cases = 397

Missing Cases = 13

Response Percent = 96.8%

Topic 1: Marketplace Dynamics - Overall Economy and Company**Are you more or less optimistic about your own company compared to last quarter?**

	Number	Percent	95% CI
3=More	206	50.5 %	± 4.9 %
2=No Change	129	31.6 %	± 4.5 %
1=Less	73	17.9 %	± 3.7 %
Total	408	100.0 %	

Mean = 2.3

SD = 0.8

Missing Cases = 2

Response Percent = 99.5 %

Topic 1: Marketplace Dynamics - Overall Economy and Company

Rate your optimism about your company on a scale from 0-100 with 0 being the least optimistic.

Minimum = 39

Maximum = 100

Mean = 72.2

Median = 75

Standard Deviation (Unbiased) = 15.4

95 Percent Confidence Interval Around The Mean = 70.7 - 73.7

Quartiles

1 = 60

2 = 75

3 = 80

Valid Cases = 396

Missing Cases = 14

Response Percent = 96.6%

Topic 1: Marketplace Dynamics - Customers**Are you more or less optimistic about your prospects for revenue growth compared to the prior 12 months?**

	Number	Percent	95% CI
3=More	234	57.4 %	± 4.8 %
2=No Change	95	23.3 %	± 4.1 %
1=Less	79	19.4 %	± 3.8 %
Total	408	100.0 %	

Mean = 2.4

SD = 0.8

Missing Cases = 2

Response Percent = 99.5 %

Topic 1: Marketplace Dynamics - Customers

Rate your optimism about your prospects for sales revenue growth on a scale from 0-100 with 0 being the least optimistic and 100 being the most optimistic

Minimum = 30

Maximum = 100

Mean = 68.5

Median = 70

Standard Deviation (Unbiased) = 18.2

95 Percent Confidence Interval Around The Mean = 66.7 - 70.3

Quartiles

1 = 55

2 = 70

3 = 80

Valid Cases = 398

Missing Cases = 12

Response Percent = 97.1%

Topic 1: Marketplace Dynamics - Customers

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

(N=410)

	1st Priority	2nd Priority	3rd Priority	Total
Low Price	86 21.0%	61 14.9%	63 15.4%	210 51.2%
Superior Product Quality	93 22.7%	70 17.1%	80 19.5%	243 59.3%
Superior Innovation	41 10.0%	40 9.8%	57 13.9%	138 33.7%
Excellent Service	85 20.7%	128 31.2%	89 21.7%	302 73.7%
Trusting Relationship	84 20.5%	88 21.5%	90 22.0%	262 63.9%
Brand	21 5.1%	23 5.6%	32 7.8%	76 18.5%

Topic 1: Marketplace Dynamics - Competitors

Predict the likelihood of the following competitor interactions over the next 12 months.

(N=410)

	Mean & SD	Likelihood							Total
		1	2	3	4	5	6	7	
More intense rivalry for customers	5.5 1.3	6 1.5%	5 1.2%	19 4.6%	52 12.7%	91 22.2%	120 29.3%	112 27.3%	405 98.8%
More competitor price-cutting	5.0 1.6	18 4.4%	18 4.4%	32 7.8%	68 16.6%	79 19.3%	110 26.8%	79 19.3%	404 98.5%
More competitor innovation	4.7 1.6	15 3.7%	28 6.8%	33 8.0%	93 22.7%	94 22.9%	92 22.4%	51 12.4%	406 99.0%
Emergence of new domestic competitors	3.7 2.1	88 21.5%	64 15.6%	44 10.7%	38 9.3%	65 15.9%	55 13.4%	52 12.7%	406 99.0%
More cooperation on non-price strategies	3.7 1.6	47 11.5%	51 12.4%	66 16.1%	111 27.1%	61 14.9%	50 12.2%	14 3.4%	400 97.6%
Emergence of new global competitors	3.5 2.0	94 22.9%	58 14.1%	60 14.6%	45 11.0%	58 14.1%	51 12.4%	38 9.3%	404 98.5%

Topic 1: Marketplace Dynamics - Channel Partners**Will you use a channel or go directly to market?**

	Number	Percent	95% CI
Uses channel partners	290	70.7 %	± 4.4 %
Does not use channel partners	120	29.3 %	± 4.4 %
Total	410	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

Topic 1: Marketplace Dynamics - Channel Partners

Focusing on your firm's channel partnerships in this market, are you more or less optimistic about your prospects for revenue growth compared to prior 12 months?

	Number	Percent	95% CI
+1=More	141	50.9 %	± 5.8 %
0=No Change	104	37.5 %	± 5.6 %
-1=Less	32	11.6 %	± 3.6 %
Total	277	100.0 %	

Mean = 0.4

SD = 0.7

Missing Cases = 13

Response Percent = 95.5 %

Topic 1: Marketplace Dynamics - Channel Partners

Do you expect the following channel partner outcomes for your firm to increase, decrease, or have no change in the next 12 months?

(N=290)

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Partner's purchase volume	0.4 0.7	146 53.7%	100 36.8%	26 9.6%	272 100.0%
Partner will buy related products and services	0.4 0.6	118 43.9%	137 50.9%	14 5.2%	269 100.0%
My firm will sell directly to end customers, not through channel partners	0.3 0.5	87 32.3%	170 63.2%	12 4.5%	269 100.0%
Partner's level of power in our relationship	0.1 0.6	63 23.2%	166 61.3%	42 15.5%	271 100.0%
Partner's price per unit	0.0 0.7	53 19.6%	151 55.9%	66 24.4%	270 100.0%

Topic 2: Firm Growth Strategies

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products or services in existing markets	53.4	25.6	50.5 - 56.2	50	0	100	310
Existing products or services in new markets	15.0	15.0	13.3 - 16.7	10	0	100	310
New products or services in existing markets	22.1	18.5	20.1 - 24.2	20	0	80	310
New products or services in new markets	9.4	13.1	8.0 - 10.9	5	0	100	310

Topic 2: Firm Growth Strategies

Allocate 100 points to reflect your firm's spending in each of the four growth strategies during the next 12 months

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products or services in existing markets	47.0	24.8	44.2 - 49.8	47.5	0	100	308
Existing products or services in new markets	16.9	14.4	15.3 - 18.5	15	0	100	308
New products or services in existing markets	24.6	17.9	22.6 - 26.6	20	0	90	308
New products or services in new markets	11.6	13.4	10.1 - 13.1	10	0	70	308

Topic 2: Firm Growth Strategies

Allocate 100 points to reflect how your firm will grow during the next 12 months.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Growth from your firm internally	71.4	29.0	68.2 - 74.6	80	0	100	315
Growth from acquisitions	9.5	16.4	7.7 - 11.3	0	0	100	315
Growth from partnerships	13.6	19.7	11.4 - 15.8	5	0	100	315
Growth from licensing arrangements	5.5	13.7	4.0 - 7.0	0	0	100	315

Topic 2: Firm Growth Strategies

What percentage of your firm's sales is domestic? Through the internet?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What % of your firm's sales is through the Internet?	8.9	14.5	7.3 - 10.5	2	0	50	313
What % of your firm's sales is domestic?	79.4	23.2	76.8 - 82.0	90	29	100	313

Topic 2: Firm Growth Strategies

Which international market is your highest revenue growth market?

	Number	Percent	Cumulative
Western Europe	55	24.3 %	24.3 %
Canada	41	18.1 %	42.5 %
China	40	17.7 %	60.2 %
Brazil	15	6.6 %	66.8 %
Middle East	14	6.2 %	73.0 %
Mexico	14	6.2 %	79.2 %
Eastern Europe	7	3.1 %	82.3 %
Japan	7	3.1 %	85.4 %
Southeast Asia	6	2.7 %	88.1 %
Australia	5	2.2 %	90.3 %
India	5	2.2 %	92.5 %
Russia	4	1.8 %	94.2 %
Korea	3	1.3 %	95.6 %
Chile	1	0.4 %	96.0 %
Argentina	1	0.4 %	96.5 %
Other:	8	3.5 %	100.0 %
Total	226	100.0 %	100.0 %

Missing Cases = 184

Response Percent = 55.1 %

Topic 2: Firm Growth Strategies

Considering this international market, by what percent did your sales revenue increase in the last 12 months? (reported in the aggregate)

Minimum = 0

Maximum = 95.3

Mean = 17.3

Median = 10

Standard Deviation (Unbiased) = 23.5

95 Percent Confidence Interval Around The Mean = 14.4 - 20.3

99 Percent Confidence Interval Around The Mean = 13.5 - 21.2

Quartiles

1 = 0

2 = 10

3 = 20

	Number	Percent	Cumulative
Less than 5%	82	32.8 %	32.8 %
5 - 9%	32	12.8 %	45.6 %
10 - 14%	31	12.4 %	58.0 %
15 - 19%	25	10.0 %	68.0 %
20% or more	80	32.0 %	100.0 %
Total	250	100.0 %	100.0 %

Missing Cases = 160

Response Percent = 61.0 %

Valid Cases =250

Missing Cases =160

Response Percent = 61.0%

Topic 2: Firm Growth Strategies

Considering this international market, by what percent did your sales revenue increase in the last 12 months? (reported by market)

	Mean	SD	N	Pct.
For Entire Sample	17.3	23.5	250	100.0%
<u>Highest revenue growth market</u>				
Argentina	25.0	0.0	1	0.5%
Australia	25.7	39.6	5	2.4%
Brazil	18.6	13.3	14	6.7%
Canada	16.9	26.4	40	19.1%
Chile	0.0	0.0	0	0.0%
China	25.7	25.3	36	17.2%
Eastern Europe	12.7	8.9	6	2.9%
India	38.1	33.6	5	2.4%
Japan	9.5	6.1	6	2.9%
Korea	31.7	16.1	3	1.4%
Mexico	16.3	14.5	13	6.2%
Middle East	27.3	27.8	14	6.7%
Russia	56.8	35.6	3	1.4%
Southeast Asia	12.2	10.3	6	2.9%
Western Europe	16.3	23.2	50	23.9%
Other:	22.0	34.5	7	3.3%

Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	4.3	9.2	3.0 - 5.5	3	-23	32.7	216
Digital marketing spending	10.1	12.2	8.4 - 11.8	5	-23	44.6	193
Traditional advertising spending	-2.1	12.6	-3.9 - -0.2	0	-41	37.6	181
Brand building	4.6	10.5	3.0 - 6.1	1	-29	39.9	173
Customer relationship management	6.0	9.2	4.6 - 7.3	3	-23	36.3	178
New product introductions	7.1	9.3	5.7 - 8.4	5	-21	35.6	174
New service introductions	4.9	8.0	3.7 - 6.1	2	-20	39.2	164
Marketing (non-sales) hires	5.5	13.4	3.5 - 7.5	0	-25	59.4	175
Integrating what we know about marketing	4.2	6.4	3.1 - 5.2	1	-10	22.6	147
Developing knowledge about how to do marketing	3.8	6.1	2.8 - 4.7	1	-5	21.2	152
Marketing training	3.6	7.0	2.5 - 4.7	0	-5	30.8	156
Marketing research and intelligence	6.6	11.0	4.9 - 8.3	5	-30	45.2	168
Marketing consulting services	1.6	8.9	0.3 - 3.0	0	-24	28	165

Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

(N=410)

	Mean & SD	Positive 1	Zero 0	Negative -1	Total
Overall marketing spending	0.5 0.7	141 65.3%	44 20.4%	31 14.4%	216 100.0%
Digital marketing spending	0.8 0.4	162 83.9%	27 14.0%	4 2.1%	193 100.0%
Traditional advertising spending	-0.1 0.8	55 30.4%	52 28.7%	74 40.9%	181 100.0%
Brand building	0.5 0.6	92 53.2%	70 40.5%	11 6.4%	173 100.0%
Customer relationship management	0.7 0.5	128 71.9%	45 25.3%	5 2.8%	178 100.0%
New product introductions	0.7 0.5	124 71.3%	46 26.4%	4 2.3%	174 100.0%
New service introductions	0.6 0.5	93 56.7%	69 42.1%	2 1.2%	164 100.0%
Marketing (non-sales) hires	0.4 0.6	85 48.6%	77 44.0%	13 7.4%	175 100.0%
Integrating what we know about marketing	0.6 0.5	85 57.8%	60 40.8%	2 1.4%	147 100.0%
Developing knowledge about how to do marketing	0.5 0.6	81 53.3%	67 44.1%	4 2.6%	152 100.0%
Marketing training	0.5 0.6	77 49.4%	74 47.4%	5 3.2%	156 100.0%
Marketing research and intelligence	0.7 0.5	115 68.5%	48 28.6%	5 3.0%	168 100.0%
Marketing consulting services	0.3 0.6	60 36.4%	87 52.7%	18 10.9%	165 100.0%

Topic 3: Marketing Spending

What percentage of your firm's overall budget does marketing currently account for?

Percent of budget

Minimum = 0

Maximum = 38

Mean = 9.4

Median = 5

Standard Deviation (Unbiased) = 9.7

95 Percent Confidence Interval Around The Mean = 8.0 - 10.8

Quartiles

1 = 2.9

2 = 5

3 = 10

Valid Cases = 191

Missing Cases = 219

Response Percent = 46.6%

Topic 3: Marketing Spending

Marketing expenses account for what percent of your firm s revenues?

Percent of revenues

Minimum = 0

Maximum = 41

Mean = 7.8

Median = 3

Standard Deviation (Unbiased) = 11.2

95 Percent Confidence Interval Around The Mean = 6.3 - 9.3

Quartiles

1 = 1

2 = 3

3 = 7.9

Valid Cases =201

Missing Cases =209

Response Percent = 49.0%

Topic 3: Marketing Spending

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

	Number	Percent	95% CI
1=We prove the impact quantitatively	81	36.3 %	± 3.9 %
2=We have a good qualitative sense of the impact, but not a quantitative impact	102	45.7 %	± 4.2 %
3=We haven't been able to show the impact yet	40	17.9 %	± 2.9 %
Total	223	100.0 %	

Missing Cases = 187

Response Percent = 54.4 %

Topic 3: Marketing Spending

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

	Number	Percent	95% CI
1=We prove the impact quantitatively	71	31.7 %	± 3.7 %
2=We have a good qualitative sense of the impact, but not a quantitative impact	112	50.0 %	± 4.3 %
3=We haven't been able to show the impact yet	41	18.3 %	± 2.9 %
Total	224	100.0 %	

Missing Cases = 186

Response Percent = 54.6 %

Topic 4: Financial and Marketing Performance

Rate your firm's performance during the last 12 months

(N=410)

	Mean & SD	-10%	-7%	-5%	-3%	-1%	0	+1%	+3%	+5%	+7%	+10%	Total
Market share	2.1 4.0	4 1.7%	2 0.8%	7 2.9%	17 7.0%	12 5.0%	42 17.4%	42 17.4%	52 21.5%	29 12.0%	11 4.5%	24 9.9%	242 100.0%
Sales Revenue	4.1 5.5	12 4.7%	3 1.2%	5 2.0%	13 5.1%	5 2.0%	26 10.2%	19 7.5%	34 13.4%	32 12.6%	25 9.8%	80 31.5%	254 100.0%
Marketing ROI	3.1 3.8	2 1.0%	0 0.0%	3 1.5%	3 1.5%	6 2.9%	46 22.5%	31 15.2%	37 18.1%	36 17.6%	12 5.9%	28 13.7%	204 100.0%
Profits	3.3 5.2	11 4.5%	4 1.6%	6 2.5%	11 4.5%	9 3.7%	25 10.3%	29 11.9%	36 14.8%	40 16.5%	16 6.6%	56 23.0%	243 100.0%
Customer acquisition	3.4 4.2	4 1.7%	1 0.4%	4 1.7%	5 2.1%	13 5.6%	28 12.0%	36 15.4%	43 18.4%	46 19.7%	15 6.4%	39 16.7%	234 100.0%
Customer retention	2.0 4.5	3 1.4%	4 1.8%	7 3.2%	16 7.2%	19 8.6%	56 25.2%	19 8.6%	39 17.6%	19 8.6%	6 2.7%	34 15.3%	222 100.0%
Brand value	3.1 4.1	0 0.0%	2 1.0%	4 2.0%	3 1.5%	6 2.9%	54 26.3%	35 17.1%	29 14.1%	26 12.7%	7 3.4%	39 19.0%	205 100.0%

Topic 4: Financial and Marketing Performance

What is your firm's goal for the next 12 months?

(N=410)

	Mean & SD	-10%	-7%	-5%	-3%	-1%	0	+1%	+3%	+5%	+7%	+10%	Total
Market share	4.3 3.4	0 0.0%	0 0.0%	1 0.4%	2 0.8%	1 0.4%	18 7.6%	42 17.8%	65 27.5%	45 19.1%	18 7.6%	44 18.6%	236 100.0%
Sales Revenue	6.5 3.9	1 0.4%	2 0.8%	3 1.2%	2 0.8%	0 0.0%	8 3.2%	9 3.6%	37 14.9%	48 19.4%	29 11.7%	109 44.0%	248 100.0%
Marketing ROI	5.0 3.7	0 0.0%	0 0.0%	2 1.0%	1 0.5%	2 1.0%	23 11.4%	13 6.4%	49 24.3%	40 19.8%	18 8.9%	54 26.7%	202 100.0%
Profits	5.8 3.7	1 0.4%	0 0.0%	1 0.4%	2 0.8%	4 1.7%	12 5.0%	14 5.8%	49 20.4%	46 19.2%	29 12.1%	82 34.2%	240 100.0%
Customer acquisition	5.8 3.5	0 0.0%	1 0.4%	1 0.4%	0 0.0%	1 0.4%	9 3.9%	21 9.2%	43 18.8%	50 21.8%	30 13.1%	73 31.9%	229 100.0%
Customer retention	4.2 4.1	1 0.5%	2 0.9%	0 0.0%	4 1.8%	7 3.2%	33 15.1%	25 11.5%	44 20.2%	36 16.5%	13 6.0%	53 24.3%	218 100.0%
Brand value	5.2 3.7	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	22 10.8%	27 13.3%	39 19.2%	37 18.2%	15 7.4%	63 31.0%	203 100.0%

Topic 4: Financial and Marketing Performance

How would you rate your company's marketing excellence?

	Number	Percent	95% CI
7=Excellent - one of the best in the world	19	7.0 %	± 2.0 %
6=A leader but not one of the best	45	16.5 %	± 3.0 %
5=Strong	81	29.8 %	± 3.9 %
4=Good	53	19.5 %	± 3.3 %
3=Fair	55	20.2 %	± 3.3 %
2=Weak	16	5.9 %	± 1.9 %
1=Very weak	3	1.1 %	± 0.8 %
Total	272	100.0 %	

Mean = 4.5

SD = 1.4

Missing Cases = 138

Response Percent = 66.3 %

Topic 4: Financial and Marketing Performance

Rate your firm on each metric during the last 12 months.

(N=410)

	Mean & SD	Excellent 5	Good 4	Average 3	Fair 2	Poor 1	Total
Developing and using customer insights	3.4 1.0	34 12.5%	104 38.2%	85 31.3%	32 11.8%	17 6.3%	272 100.0%
Sharing valuable marketing knowledge	3.4 1.0	29 10.8%	113 42.0%	78 29.0%	31 11.5%	18 6.7%	269 100.0%
Marketing that is beneficial for society	3.1 1.1	19 8.3%	64 27.8%	85 37.0%	41 17.8%	21 9.1%	230 100.0%
Minimize the impact of marketing on the ecological environment	3.0 1.1	18 9.2%	43 21.9%	76 38.8%	37 18.9%	22 11.2%	196 100.0%

Topic 5: Social Media**What percent of your marketing budget...**

	Mean	SD	95% CI	Median	Total
...do you currently spend on social media?	6.6	7.5	5.7 - 7.6	5	244
...will you spend in the next 12 months?	9.1	9.3	7.9 - 10.2	5	243
...will you spend in five years?	15.8	12.8	14.2 - 17.5	15	242

Topic 5: Social Media

In-house vs. outsourcing of social media activities?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
How many of people does your firm employ in-house to do social media?	2.4	3.9	1.9 - 2.9	1	0	28.9	248
What percentage of these social media employees are within marketing?	66.7	44.2	61.0 - 72.3	100	0	100	236
How many of people does your firm employ from other companies to perform social media activities?	1.3	2.7	1.0 - 1.6	0	0	12	238

Topic 5: Social Media

How effectively is social media linked to your firm's marketing strategy?

	Number	Percent	Cumulative
7=Very Effectively	21	8.2 %	8.2 %
6=	31	12.1 %	20.3 %
5=	61	23.8 %	44.1 %
4=	32	12.5 %	56.6 %
3=	38	14.8 %	71.5 %
2=	37	14.5 %	85.9 %
1=Not At All Effectively	36	14.1 %	100.0 %
Total	256	100.0 %	100.0 %

Mean = 3.9

SD = 1.9

Missing Cases = 154

Response Percent = 62.4 %

Topic 5: Social Media

Companies interact with customers across a range of purchasing and communication channels. How effectively does your company integrate customer information across purchasing, communication and social media channels?

	Number	Percent	95% CI
1=Not At All Effectively	38	15.0 %	± 2.8 %
2=	46	18.2 %	± 3.1 %
3=	48	19.0 %	± 3.1 %
4=	49	19.4 %	± 3.2 %
5=	48	19.0 %	± 3.1 %
6=	18	7.1 %	± 2.0 %
7=Very Effectively	6	2.4 %	± 1.2 %
Total	253	100.0 %	

Mean = 3.4

SD = 1.6

Missing Cases = 157

Response Percent = 61.7 %

Topic 5: Social Media

Which best describes how you show the impact of social media on your business?

	Number	Percent	95% CI
1=We have proven the impact quantitatively	38	15.0 %	± 2.8 %
2=We have a good qualitative sense of the impact, but not a quantitative impact	91	35.8 %	± 4.0 %
3=We haven't been able to show the impact yet	125	49.2 %	± 4.5 %
Total	254	100.0 %	

Mean = 2.3

SD = 0.7

Missing Cases = 156

Response Percent = 62.0 %

Topic 5: Social Media**Does your company use customer behavior data collected online for targeting purposes?**

	Number	Percent	95% CI
Yes	113	40.5 %	± 4.4 %
No	166	59.5 %	± 4.8 %
Total	279	100.0 %	

Missing Cases = 131

Response Percent = 68.0 %

Topic 5: Social Media

Is your company's use of such data increasing, decreasing, or staying the same over time?

	Number	Percent	95% CI
+1=Increasing	100	88.5 %	± 6.0 %
0=About the same	13	11.5 %	± 6.0 %
-1=Decreasing	0	0.0 %	± 0.0 %
Total	113	100.0 %	

Mean = 0.9

SD = 0.3

Missing Cases = 0

Response Percent = 100.0 %

Topic 5: Social Media

How worried are you that this use of online customer data could raise questions about privacy?

	Number	Percent	95% CI
1=Not At All Worried	18	15.9 %	± 6.9 %
2=	22	19.5 %	± 7.4 %
3=	16	14.2 %	± 6.5 %
4=	17	15.0 %	± 6.7 %
5=	21	18.6 %	± 7.3 %
6=	15	13.3 %	± 6.4 %
7=Very Worried	4	3.5 %	± 3.5 %
Total	113	100.0 %	

Mean = 3.5

SD = 1.8

Missing Cases = 0

Response Percent = 100.0 %

Topic 6: Marketing Jobs

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

Minimum = -40

Maximum = 55

Mean = 5.5

Median = 0

Standard Deviation (Unbiased) = 14.3

95 Percent Confidence Interval Around The Mean = 3.6 - 7.4

Quartiles

1 = 0

2 = 0

3 = 5

Valid Cases = 215

Missing Cases = 195

Response Percent = 52.4%

Topic 6: Marketing Jobs

By what percentage will your firm's outsourcing of marketing activities change in the next year?

Minimum = -16

Maximum = 23

Mean = 2.6

Median = 0

Standard Deviation (Unbiased) = 7.2

95 Percent Confidence Interval Around The Mean = 1.6 - 3.5

Quartiles

1 = 0

2 = 0

3 = 3.5

Valid Cases = 211

Missing Cases = 199

Response Percent = 51.5%

Topic 7: Marketing Organization

Number of employees

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
How many employees does your firm have?	7780	23613	4601 - 10958	495	1	124551	212
How many marketing (non-sales) employees are in your firm?	90	333	45 - 135	10	0	2990	208

Topic 7: Marketing Organization

Companies are generally organized by product/service groups or by customer groups. Which organizational structure is most common in your company?

	Number	Percent	95% CI
Product/service groups	157	71.4 %	± 4.7 %
Customer groups	63	28.6 %	± 3.5 %
Total	220	100.0 %	

Missing Cases = 190

Response Percent = 53.7 %

Topic 7: Marketing Organization

Rate the extent to which your firm engages in the following market-oriented behaviors.

(N=410)

	Mean SD	Not at all 1	2	3	4	5	6	All the time 7	Total
Is collected on a regular basis	5.1 1.7	8 3.7%	11 5.0%	19 8.7%	37 16.9%	47 21.5%	40 18.3%	57 26.0%	219 100.0%
Is shared vertically across different levels of the firm and business units	4.5 1.7	11 5.0%	22 10.0%	33 15.1%	32 14.6%	57 26.0%	38 17.4%	26 11.9%	219 100.0%
Is shared horizontally across different functions and business units	4.5 1.6	10 4.7%	19 8.8%	28 13.0%	45 20.9%	53 24.7%	33 15.3%	27 12.6%	215 100.0%
Shapes the design of firm strategies	4.6 1.5	6 2.7%	18 8.2%	29 13.2%	37 16.8%	66 30.0%	45 20.5%	19 8.6%	220 100.0%
Influences the implementation of firm strategies	4.8 1.5	5 2.3%	16 7.3%	22 10.1%	33 15.1%	66 30.3%	55 25.2%	21 9.6%	218 100.0%
Impacts the evaluation of firm strategies	4.7 1.5	10 4.6%	13 5.9%	20 9.1%	41 18.7%	64 29.2%	51 23.3%	20 9.1%	219 100.0%

Topic 8: Marketing Leadership

What is marketing primarily responsible for in your firm?

	Number	Percent	95% CI
Advertising	187	83.9 %	± 4.9 %
Brand	180	80.7 %	± 5.2 %
Promotion	179	80.3 %	± 5.3 %
Positioning	171	76.7 %	± 5.6 %
Social media	167	74.9 %	± 5.7 %
Marketing analytics	154	69.1 %	± 6.1 %
Marketing research	148	66.4 %	± 6.3 %
Public relations	139	62.3 %	± 6.4 %
Lead generation	125	56.1 %	± 6.6 %
Competitive intelligence	124	55.6 %	± 6.6 %
Market entry strategies	122	54.7 %	± 6.6 %
New products	108	48.4 %	± 6.6 %
Customer relationship management	90	40.4 %	± 6.5 %
Market selection	89	39.9 %	± 6.5 %
Pricing	83	37.2 %	± 6.4 %
Innovation	73	32.7 %	± 6.2 %
Sales	62	27.8 %	± 5.9 %
Customer service	49	22.0 %	± 5.5 %
Distribution	33	14.8 %	± 4.7 %
Stock market performance	7	3.1 %	± 2.3 %
Total	2290		

Number of Cases = 223

Number of Responses = 2290

Average Number of Responses per Case = 10.3

Number of Cases With at Least One Response = 223

Response Percent = 100.0 %

Topic 8: Marketing Leadership**Number of reports**

	<u>Median</u>	<u>Mean</u>	<u>SD</u>	<u>Minimum</u>	<u>Maximum</u>	<u>Range</u>	<u>Total</u>
How many direct reports do you have?	5	6.9	10.4	0	65	65	211
How many indirect reports (dotted-line) reports do you have?	5	16.1	29.5	0	139	139	182

Topic 8: Marketing Leadership**How many years have you been with this firm in your current role? In any role?**

	Median	Mean	SD	Minimum	Maximum	Total
In your current role?	4	5.1	4.0	0	14	219
In any role?	7.5	10.0	8.1	0	27	212

Topic 8: Marketing Leadership**Do you feel pressure from your CEO or Board to prove the value of marketing?**

	Number	Percent	95% CI
Yes	148	66.4 %	± 4.7 %
No	75	33.6 %	± 3.8 %
Total	223	100.0 %	

Missing Cases = 187

Response Percent = 54.4 %

Topic 8: Marketing Leadership**Is this pressure increasing, decreasing, or about the same?**

	Number	Percent	95% CI
+1=Increasing pressure	89	60.1 %	± 8.0 %
0=About the same amount of pressure	56	37.8 %	± 7.9 %
-1=Decreasing pressure	3	2.0 %	± 2.3 %
Total	148	100.0 %	

Mean = 0.6

SD = 0.5

Missing Cases = 0

Response Percent = 100.0 %

Topic 9: Marketing Analytics**What percent of your marketing budget...**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
...do you currently spend on marketing analytics?	5.5	5.5	4.8 - 6.2	5	0	19	225
...will you spend in the next three years?	8.7	7.3	7.8 - 9.7	7	0	26	224

Topic 9: Marketing Analytics

In what percent of projects does your company use available or requested marketing analytics before a decision is made?

Minimum = 0

Maximum = 90

Mean = 29.0

Median = 15

Standard Deviation (Unbiased) = 30.1

95 Percent Confidence Interval Around The Mean = 25.0 - 32.9

99 Percent Confidence Interval Around The Mean = 23.8 - 34.2

Quartiles

1 = 2

2 = 15

3 = 50

Valid Cases = 221

Missing Cases = 189

Response Percent = 53.9%

Topic 9: Marketing Analytics**Does your company formally evaluate the quality of marketing analytics?**

	Number	Percent	95% CI
Yes	77	32.9 %	± 3.8 %
No	157	67.1 %	± 4.7 %
Total	234	100.0 %	

Missing Cases = 176

Response Percent = 57.1 %

Topic 9: Marketing Analytics

To what degree has the use of marketing analytics contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	45	19.4 %	± 3.0 %
2=	32	13.8 %	± 2.6 %
3=	29	12.5 %	± 2.5 %
4=	43	18.5 %	± 3.0 %
5=	50	21.6 %	± 3.2 %
6=	26	11.2 %	± 2.4 %
7=Very Highly	7	3.0 %	± 1.3 %
Total	232	100.0 %	

Mean = 3.5

SD = 1.8

Missing Cases = 178

Response Percent = 56.6 %

Topic 9: Marketing Analytics

To what degree is your company leveraging marketing analytics to answer its most challenging marketing questions?

	Number	Percent	95% CI
1=None of the time	32	13.7 %	± 2.6 %
2=	41	17.5 %	± 2.9 %
3=	28	12.0 %	± 2.5 %
4=Some of the time	43	18.4 %	± 3.0 %
5=	53	22.6 %	± 3.3 %
6=	27	11.5 %	± 2.4 %
7=All of the time	10	4.3 %	± 1.5 %
Total	234	100.0 %	

Mean = 3.7

SD = 1.7

Missing Cases = 176

Response Percent = 57.1 %

Topic 9: Marketing Analytics

To what extent does your company have the right talent to fully leverage marketing analytics?

	Number	Percent	95% CI
1=Does not have the right talent	30	12.9 %	± 2.5 %
2=	59	25.4 %	± 3.4 %
3=	41	17.7 %	± 2.9 %
4=	39	16.8 %	± 2.9 %
5=	31	13.4 %	± 2.6 %
6=	24	10.3 %	± 2.3 %
7=Has the right talent	8	3.4 %	± 1.3 %
Total	232	100.0 %	

Mean = 3.4

SD = 1.7

Missing Cases = 178

Response Percent = 56.6 %

Topic 9: Marketing Analytics**Have you added analytics talent to your marketing organization in the last year?**

	Number	Percent	95% CI
Yes	80	34.3 %	± 3.9 %
No	153	65.7 %	± 4.7 %
Total	233	100.0 %	

Missing Cases = 177

Response Percent = 56.8 %

Topic 9: Marketing Analytics

How challenging was it to find the right talent?

	Number	Percent	95% CI
1=Not Challenging	1	1.2 %	± 0.5 %
2=	5	6.2 %	± 1.1 %
3=	5	6.2 %	± 1.1 %
4=	17	21.0 %	± 2.0 %
5=	24	29.6 %	± 2.3 %
6=	19	23.5 %	± 2.1 %
7=Extremely Challenging	10	12.3 %	± 1.5 %
Total	81	100.0 %	

Mean = 4.9

SD = 1.4

Missing Cases = 329

Response Percent = 19.8 %

Topic 9: Marketing Analytics

Check all of the areas in which you are using marketing analytics to drive decision making

	Number	Percent	95% CI
Customer acquisition	130	31.7 %	± 4.5 %
Digital marketing	117	28.5 %	± 4.4 %
Customer retention	113	27.6 %	± 4.4 %
Promotion	97	23.7 %	± 4.1 %
Pricing	95	23.2 %	± 4.1 %
Branding	90	22.0 %	± 4.0 %
Marketing mix	89	21.7 %	± 4.0 %
Social media	86	21.0 %	± 4.0 %
Product line/assortment optimization	77	18.8 %	± 3.8 %
Multichannel marketing	55	13.4 %	± 3.3 %
Recommendation engine	30	7.3 %	± 2.5 %
Other areas:	10	2.4 %	± 1.5 %
Total	989		

Number of Cases = 410

Number of Responses = 989

Average Number of Responses per Case = 2.4

Number of Cases With at Least One Response = 207

Response Percent = 50.5 %

Appendix: Firm-level Descriptive Information

Which economic sector best describes your firm?

	Number	Percent	95% CI
B2B - Product	134	33.6 %	± 4.6 %
B2B - Services	126	31.6 %	± 4.5 %
B2C - Product	75	18.8 %	± 3.8 %
B2C - Services	64	16.0 %	± 3.5 %
Total	399	100.0 %	

Missing Cases = 11

Response Percent = 97.3 %

Appendix: Firm-level Descriptive Information**What is your firm's ownership structure?**

	Number	Percent	95% CI
Public/NYSE/AMEX	64	28.7 %	± 3.5 %
Public/NASDAQ	16	7.2 %	± 1.9 %
Private	136	61.0 %	± 4.6 %
Nonprofit	7	3.1 %	± 1.3 %
Total	223	100.0 %	

Missing Cases = 187

Response Percent = 54.4 %

Appendix: Firm-level Descriptive Information

What was your firm's sales revenue in last 12 months?

	Number	Percent	Cumulative
Less than \$25 million	62	29.0 %	29.0 %
\$26-99 million	34	15.9 %	44.9 %
\$100-499 million	34	15.9 %	60.7 %
\$500-999 million	22	10.3 %	71.0 %
\$1-2.5 billion	24	11.2 %	82.2 %
\$2.6-5 billion	14	6.5 %	88.8 %
\$5.1-9.9 billion	9	4.2 %	93.0 %
\$10-49 billion	9	4.2 %	97.2 %
\$50-100 billion	1	0.5 %	97.7 %
<u>More than \$100+ billion</u>	<u>5</u>	<u>2.3 %</u>	<u>100.0 %</u>
Total	214	100.0 %	100.0 %

Missing Cases = 196

Response Percent = 52.2 %

Appendix: Firm-level Descriptive Information

Which industry sector best describes your firm?

	Number	Percent	95% CI
Manufacturing	41	18.5 %	± 2.9 %
Professional Services/Consulting	39	17.6 %	± 2.9 %
Banking/Finance/Insurance	24	10.8 %	± 2.3 %
Technology [Software/Biotech]	23	10.4 %	± 2.2 %
Communications/Media	20	9.0 %	± 2.1 %
Retail/Wholesale	19	8.6 %	± 2.1 %
Consumer Packaged Goods	18	8.1 %	± 2.0 %
Health Care/Pharmaceutical	14	6.3 %	± 1.8 %
Consumer Services	9	4.1 %	± 1.4 %
Energy	7	3.2 %	± 1.3 %
Transportation	5	2.3 %	± 1.1 %
Mining/Construction	3	1.4 %	± 0.8 %
Total	222	100.0 %	

Missing Cases = 188

Response Percent = 54.1 %