

The **CMO** Survey[®]

Predicting the future of markets, tracking marketing excellence,
and improving the value of marketing since 2008

Topline Results

August 2018

Deloitte.

DUKE
FUQUA

AM> | AMERICAN MARKETING
ASSOCIATION

cmosurvey.org



Table of Contents

Topic 1: Marketplace Dynamics

- 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 Rank your customers' top three priorities (1, 2, 3) over the next 12 months

Topic 2: Firm Growth Strategies

- 4 Allocate 100 points to reflect your firm's spending on growth strategies during the prior 12 months.
- 5 Rank the following factors in terms of their importance for driving organic revenue growth in your organization?
- 6 What percent of your marketing budget do you spend on domestic markets?
- 7 What percentage of your firm's sales is domestic?
- 8 What percentage of your firm's sales is through the internet?
- 9 What factors prevent your company from selling more products or services over the internet?

Topic 3: Marketing Spending

- 10 By what percent has your overall marketing spending changed in the prior 12 months?
- 11 What is your company's percentage change in marketing spending during the next 12 months?
- 12 Marketing expenses in your company include the following (check all that apply):
- 13 What is your company's percentage change in spending during the next 12 months in each marketing category?
- 14 What percent of your marketing budget does your company currently spend on digital and non-digital marketing activities? Next five years?
- 15 By what percent has your spending on each type of marketing knowledge changed in the prior 12 months?
- 16 What percent of your marketing budget is currently devoted to training and development?
- 17 What percentage of your firm's overall budget does marketing currently account for?
- 18 Marketing expenses account for what percent of your firm's revenues?

Topic 4: Firm Performance

- 19 Rate your firm's financial and market performance during the last 12 months.
- 20 Rate your firm on each social metric during the last 12 months.

Topic 5: Social Media Marketing

- 21 What percent of your marketing budget do you spend on social media?
- 22 How effectively is social media linked to your firm's marketing strategy?
- 23 How effectively does your company integrate customer information across purchasing, communication and social media channels?
- 24 What percent of social media activities are performed by outside agencies?
- 25 To what degree has the use of social media contributed to your company's performance?
- 26 Which best describes how you show the impact of social media on your business?

Topic 6: Mobile Marketing

- 27 What percent of your marketing budget do you spend on mobile activities?
- 28 To what degree has the use of mobile marketing contributed to your company's performance?

Topic 7: Marketing Jobs

- 29 By what percentage will your firm's marketing hires change in the next year?
- 30 When thinking about future marketing talent needs, what skills would you prioritize?
- 31 By what percentage will your firm's outsourcing of marketing activities change in the next year?
- 32 How many employees/marketing employees are in your company?

Topic 8: Marketing Organization

- 33 Rate the quality of your company's marketing knowledge resources
- 34 Rate the importance of protecting your marketing knowledge resources
- 35 How well has your company developed strong knowledge and skills in each digital marketing strategy area?
- 36 How does your company approach the development of new marketing capabilities?
- 37 Rate the extent to which your firm engages in the following market-oriented behaviors
- 38 What percent of your company's marketing strategy will be substantially different in five years?

Topic 9: Marketing Leadership

- 39 What is marketing primarily responsible for in your firm?
- 40 How many direct and indirect reports do you have?
- 41 How many years have you been with this firm in your current role? In any role?
- 42 How has marketing's role within your organization changed in the last five years?
- 43 Do you feel pressure from your CEO or Board to prove the value of marketing?
- 44 Is this pressure increasing, decreasing, or about the same?
- 45 Has your company's use of online customer data changed over the last two years?
- 46 Do you expect your company's use of online customer data to change over the next two years?
- 47 How worried are you that this use of online customer data could raise questions about privacy?
- 48 Has your company's use of third-party customer data changed over the last two years?
- 49 Do you expect your company's use of third-party customer data to change over the next two years?
- 50 How worried are you that your company's use of third-party customer data could raise questions about privacy?
- 51 Do you believe it is appropriate for your brand to take a stance on politically-charged issues?
- 52 Which of the following reasons influenced your willingness to take a stance.
- 53 Which of the following reasons influenced your unwillingness to take a stance.

Topic 10: Marketing Analytics

- 54 What percent of your marketing budget do you spend on marketing analytics?
- 55 In what percent of projects does your company use marketing analytics before a decision is made?
- 56 To what degree has the use of marketing analytics contributed to your company's performance?
- 57 Which best describes how your company shows the short-term impact of marketing spend on your business?
- 58 Which best describes how your company shows the long-term impact of marketing spend on your business?
- 59 What factors prevent your company from using more marketing analytics?

Appendix: Firm-level Descriptive Information

- 60 Which is your firm's primary economic sector?
- 61 What is your firm's primary industry sector?
- 62 What was your firm's sales revenue in last 12 months?

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

	Number	Percent	95% CI
3=More	117	37.4 %	± 5.2 %
2=No Change	102	32.6 %	± 5.1 %
1=Less	94	30.0 %	± 4.9 %
Total	313	100.0 %	

Mean = 2.07

SD = 0.82

Missing cases = 13

Response percent = 96.0 %

Topic 1: Marketplace Dynamics - Overall Economy

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

Minimum = 29.23

Maximum = 100

Mean = 66.75

Median = 70

Standard Deviation (Unbiased Estimate) = 17.99

95 Percent Confidence Interval around the mean = 64.76 - 68.74

Valid cases = 313

Missing cases = 13

Response percent = 96.0%

Topic 1: Marketplace Dynamics - Customers

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

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	2.17 0.86	43 14.4%	35 11.7%	68 22.8%	146 49.0%
Superior product quality	1.77 0.81	97 32.6%	63 21.1%	49 16.4%	209 70.1%
Superior innovation	1.91 0.84	46 15.4%	35 11.7%	36 12.1%	117 39.3%
Excellent service	2.01 0.77	68 22.8%	96 32.2%	70 23.5%	234 78.5%
Trusting relationship	2.16 0.78	44 14.8%	69 23.2%	74 24.8%	187 62.8%

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/services in existing markets	52.8	26.8	48.5 - 57.1	50	0	100	150
New products/services in existing markets	24.2	20.2	21.0 - 27.4	25	0	100	150
Existing products/services in new markets	13.0	12.5	11.0 - 15.0	10	0	50	150
New products/services in new markets	10.0	15.2	7.6 - 12.5	5	0	100	150

Topic 2: Firm Growth Strategies

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

	Mean & SD	1	2	3	4	5	Total
Having the right talent	2.21 1.14	49 33.8%	42 29.0%	34 23.4%	14 9.7%	6 4.1%	145 100.0%
Having the right operating model	2.69 1.35	31 21.4%	46 31.7%	26 17.9%	21 14.5%	21 14.5%	145 100.0%
Having all stakeholders aligned	2.97 1.48	33 22.8%	30 20.7%	23 15.9%	27 18.6%	32 22.1%	145 100.0%
Having the right technology	3.49 1.37	19 13.1%	14 9.7%	34 23.4%	32 22.1%	45 31.0%	144 99.3%
Having the right data	3.63 1.23	13 9.0%	13 9.0%	28 19.3%	50 34.5%	40 27.6%	144 99.3%

Topic 2: Firm Growth Strategies

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

Minimum = 0

Maximum = 100

Mean = 84.83

Median = 100

Standard Deviation (Unbiased Estimate) = 25.76

95 Percent Confidence Interval around the mean = 80.69 - 88.96

Valid cases = 149

Missing cases = 177

Response percent = 45.7%

Topic 2: Firm Growth Strategies

What percentage of your firm's sales is domestic?

Minimum = 30.45

Maximum = 100

Mean = 81.35

Median = 91.50

Standard Deviation (Unbiased Estimate) = 23.14

95 Percent Confidence Interval Around The Mean = 77.66 - 85.04

Valid Cases = 151

Missing Cases = 175

Response percent = 46.3%

Topic 2: Firm Growth Strategies

What percentage of your firm's sales are through the internet?

Minimum = 0

Maximum = 66.75

Mean = 12.16

Median = 1

Standard Deviation (Unbiased Estimate) = 21.01

95 Percent Confidence Interval Around The Mean = 9.86 - 14.47

Valid Cases = 319

Missing Cases = 7

Response percent = 97.9%

Topic 2: Firm Growth Strategies

What factors prevent your company from selling more products or services over the internet?

	Number	Percent	95% CI
Our business requires more human interaction than can be provided over the internet	76	55.9 %	± 8.5 %
A new business model would be required	67	49.3 %	± 8.5 %
Our products/services are too complex to sell over the internet	63	46.3 %	± 8.5 %
Our business requires more customer experience than can be provided over the internet	53	39.0 %	± 8.3 %
We don't want to compete for these customers	18	13.2 %	± 5.8 %
Leaders/owners/board have dictated this strategic direction	15	11.0 %	± 5.3 %
<u>We don't have the knowledge or skills to compete effectively</u>	<u>14</u>	<u>10.3 %</u>	<u>± 5.2 %</u>
Total	306		

Number of cases = 136

Number of responses = 306

Average number of responses per case = 2.3

Number of cases with at least one response = 136

Response percent = 100.0 %

Topic 3: Marketing Spending

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

Minimum = -34.95

Maximum = 50.93

Mean = 7.48

Median = 5

Standard Deviation (Unbiased Estimate) = 16.72

95 Percent Confidence Interval around the mean = 5.21 - 9.76

Valid cases = 207

Missing cases = 119

Response percent = 63.5%

Topic 3: Marketing Spending

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in: Overall marketing spending

Minimum = -29.81

Maximum = 47.16

Mean = 7.47

Median = 5

Standard Deviation (Unbiased Estimate) = 13.71

95 Percent Confidence Interval around the mean = 5.52 - 9.41

Valid cases = 191

Missing cases = 135

Response percent = 58.6%

Topic 3: Marketing Spending

Marketing expenses in your company include the following (check all that apply):

	Number	Percent	95% CI
Direct expenses of marketing activities	191	92.3 %	± 3.7 %
Social media marketing	170	82.1 %	± 5.3 %
Marketing employees	154	74.4 %	± 6.0 %
Marketing analytics	152	73.4 %	± 6.1 %
Marketing research	139	67.1 %	± 6.5 %
Other overhead costs associated with marketing	136	65.7 %	± 6.5 %
Mobile marketing tools	97	46.9 %	± 6.9 %
Marketing training	97	46.9 %	± 6.9 %
Sales support tools	85	41.1 %	± 6.8 %
Sales employees	45	21.7 %	± 5.7 %
Total	1266		

Number of cases = 207

Number of responses = 1266

Average number of responses per case = 6.1

Number of cases with at least one response = 207

Response percent = 100.0 %

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
Digital marketing spending	12.3	14.8	10.2 - 14.4	10	-25.4	52.3	186
Traditional advertising spending	-1.2	10.0	-2.7 - 0.2	0	-31.4	28.8	178
Brand building	7.3	9.7	5.9 - 8.7	5	-18.9	35.5	186
Customer relationship management	9.5	12.6	7.7 - 11.4	5	-5	47.7	181
New product introductions	6.3	9.6	4.9 - 7.7	5	-21.5	35.8	178
New service introductions	6.1	9.1	4.7 - 7.4	1	-10	32.1	179

Topic 3: Marketing Spending

What percent of your marketing budget does your company currently spend on digital and non-digital marketing activities? How do you think these percentages will change in the next five years?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Current % non-digital	55.3	30.2	51.1 - 59.4	60	0	100	205
Next five years % non-digital	45.4	27.2	41.7 - 49.2	50	0	100	201
Current % digital	44.3	30.1	40.2 - 48.4	40	0	100	205
Next five years % digital	54.1	27.3	50.3 - 57.9	50	0	100	201

Topic 3: Marketing Spending

By what percent has your spending on each type of marketing knowledge changed in the prior 12 months? Be sure to report the level and direction of the change. (e.g., 10%, 0%, -5%)

	<u>Minimum</u>	<u>Maximum</u>	<u>Mean</u>	<u>Median</u>	<u>SD</u>	<u>95% Confidence Interval</u>
Marketing training	-17%	26%	3.45%	0	6.99	2.35 - 4.54
Marketing research and intelligence	-17%	29%	5.12%	0	8.07	3.87-6.37
Marketing consulting services	-36%	47.4%	4.79%	0	13.97	2.59-6.98
Developing new marketing knowledge and capabilities	0	41%	7.96%	5	10.09	6.40-9.53

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 20.73

Mean = 3.89

Median = 2

Standard Deviation (Unbiased Estimate) = 5.00

95 Percent Confidence Interval around the mean = 3.14 - 4.65

Valid cases = 168

Missing cases = 158

Response percent = 51.5%

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 38.35

Mean = 10.81

Median = 7

Standard Deviation (Unbiased Estimate) = 10.37

95 Percent Confidence Interval around the mean = 9.31 - 12.30

Valid cases = 185

Missing cases = 141

Response percent = 56.7%

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 42.48

Mean = 7.26

Median = 3.50

Standard Deviation (Unbiased Estimate) = 9.87

95 Percent Confidence Interval around the mean = 5.85 - 8.66

Valid cases = 190

Missing cases = 136

Response percent = 58.3%

Topic 4: Firm Performance

Rate your firm's financial and market performance during the last 12 months

	Mean	SD	95% CI	Median	Total
Market share	2.0	4.0	1.3 - 2.6	3	151
Sales revenue	4.7	4.9	4.0 - 5.5	5	151
Marketing ROI	2.8	4.3	2.2 - 3.5	3	149
Profits	3.5	5.3	2.6 - 4.3	3	148
Customer acquisition	3.2	4.3	2.5 - 3.9	3	149
Customer retention	2.2	4.1	1.5 - 2.8	1	148
Brand value	3.4	4.1	2.8 - 4.1	3	149

Topic 4: Firm Performance

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

	Mean & SD	Excellent 5	Good 4	Average 3	Fair 2	Poor 1	Total
Marketing that is beneficial for society	3.47 1.10	29 18.2%	53 33.3%	52 32.7%	14 8.8%	11 6.9%	159 100.0%
Minimizing the impact of marketing on the ecological environment	3.22 1.12	24 15.1%	35 22.0%	65 40.9%	22 13.8%	13 8.2%	159 100.0%

Topic 5: Social Media

What percent of your marketing budget do you spend on social media?

	Mean	SD	95% CI	Median	Total
...of your marketing budget do you currently spend on social media?	13.8	14.9	11.9 - 15.7	10	239
...will you spend in the next 12 months?	16.3	16.3	14.2 - 18.4	10	237
...do you predict you will spend in five years?	22.9	19.7	20.3 - 25.4	20	236

Topic 5: Social Media

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

	Number	Percent	Cumulative
1=Not At All Effectively	27	11.2 %	11.2 %
2=	29	12.0 %	23.1 %
3=	25	10.3 %	33.5 %
4=	49	20.2 %	53.7 %
5=	43	17.8 %	71.5 %
6=	46	19.0 %	90.5 %
7=Very Effectively	23	9.5 %	100.0 %
Total	242	100.0 %	100.0 %

Mean = 4.17

SD = 1.83

Missing cases = 84

Response percent = 74.2 %

Topic 5: Social Media

How effectively does your company integrate customer information across purchasing, communication and social media channels?

	Number	Percent	95% CI
1=Not At All Effectively	39	16.3 %	± 3.5 %
2=	47	19.6 %	± 3.8 %
3=	39	16.3 %	± 3.5 %
4=	41	17.1 %	± 3.6 %
5=	37	15.4 %	± 3.5 %
6=	25	10.4 %	± 2.9 %
7=Very Effectively	12	5.0 %	± 2.1 %
Total	240	100.0 %	

Mean = 3.47

SD = 1.78

Missing cases = 86

Response percent = 73.6 %

Topic 5: Social Media**What percent of your company's social media activities are currently performed by outside agencies?**

Minimum = 0

Maximum = 100

Mean = 21.74

Median = 1

Standard Deviation (Unbiased Estimate) = 32.06

95 Percent Confidence Interval around the mean = 17.64 - 25.84

Valid cases = 235

Missing cases = 91

Response percent = 72.1%

Topic 5: Social Media

To what degree has the use of social media contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	36	15.0 %	± 3.4 %
2=	54	22.5 %	± 4.1 %
3=	44	18.3 %	± 3.7 %
4=	39	16.3 %	± 3.5 %
5=	37	15.4 %	± 3.5 %
6=	14	5.8 %	± 2.2 %
7=Very Highly	16	6.7 %	± 2.4 %
Total	240	100.0 %	

Mean = 3.39

SD = 1.75

Missing cases = 86

Response percent = 73.6 %

Topic 5: Social Media

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

	Number	Percent	95% CI
We have proven the impact quantitatively	59	24.7 %	± 4.2 %
We have a good qualitative sense of the impact, but not a quantitative impact	86	36.0 %	± 4.8 %
We haven't been able to show the impact yet	94	39.3 %	± 5.0 %
Total	239	100.0 %	

Missing cases = 87

Response percent = 73.3 %

Topic 6: Mobile Marketing

What percent of your marketing budget do you spend on mobile activities?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing budget do you currently spend on mobile activities?	9.4	11.9	7.5 - 11.2	5	0	42.6	155
What percent will you spend on mobile activities in three years?	18.0	17.8	15.2 - 20.8	15	0	58.3	154

Topic 6: Mobile Marketing

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

	Number	Percent	95% CI
1=Not At All	45	28.1 %	± 3.8 %
2=	40	25.0 %	± 3.6 %
3=	19	11.9 %	± 2.6 %
4=	19	11.9 %	± 2.6 %
5=	20	12.5 %	± 2.6 %
6=	12	7.5 %	± 2.1 %
7=Very Highly	5	3.1 %	± 1.3 %
Total	160	100.0 %	

Mean = 2.91

SD = 1.78

Missing cases = 166

Response percent = 49.1 %

Topic 7: 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 = -35.56

Maximum = 48.89

Mean = 6.42

Median = 2

Standard Deviation (Unbiased Estimate) = 13.36

95 Percent Confidence Interval around the mean = 4.26 - 8.59

Valid cases = 146

Missing cases = 180

Response percent = 44.8%

Topic 7: Marketing Jobs

When thinking about future marketing talent needs, what skills would you prioritize (1=most important, 7= least important) in the hiring process? (Rank in order of importance)

	Mean & SD	Most Important 1	2	3	4	5	6	Least Important 7	Total
Creativity	3.12 1.81	37 25.2%	26 17.7%	24 16.3%	29 19.7%	14 9.5%	7 4.8%	10 6.8%	147 100.0%
Natural leadership abilities	3.66 1.99	31 21.1%	20 13.6%	20 13.6%	18 12.2%	24 16.3%	23 15.6%	11 7.5%	147 100.0%
Emotional intelligence	3.86 1.80	15 10.2%	25 17.0%	29 19.7%	18 12.2%	27 18.4%	22 15.0%	11 7.5%	147 100.0%
Curiosity	3.97 1.91	15 10.2%	26 17.7%	23 15.6%	25 17.0%	21 14.3%	17 11.6%	20 13.6%	147 100.0%
MarTech platform experience	4.18 2.29	26 17.7%	22 15.0%	14 9.5%	17 11.6%	15 10.2%	11 7.5%	42 28.6%	147 100.0%
Data science background	4.24 2.06	21 14.3%	18 12.2%	18 12.2%	13 8.8%	25 17.0%	29 19.7%	23 15.6%	147 100.0%
Financial acumen	4.97 1.62	2 1.4%	10 6.8%	19 12.9%	27 18.4%	21 14.3%	38 25.9%	30 20.4%	147 100.0%

Topic 7: Marketing Jobs**By what percentage will your firm's outsourcing of marketing activities change in the next year?**

Minimum = -23.75

Maximum = 36.91

Mean = 5.47

Median = 0

Standard Deviation (Unbiased Estimate) = 10.57

95 Percent Confidence Interval around the mean = 3.77 - 7.17

Valid cases = 148

Missing cases = 178

Response percent = 45.4%

Topic 7: Marketing Jobs**How many employees/marketing employees are in your company?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Number of employees	3839	9372	2349 - 5329	400	1	64079	152
Number of marketing employees	99	342	44 - 154	10	0	2587	147

Topic 8: Marketing Organization

Rate the quality of your company's marketing knowledge resources:

	Mean & SD	Poor 1	2	3	4	5	6	Excellent 7	Total
Customer insights	4.68 1.62	6 3.5%	19 11.0%	16 9.2%	24 13.9%	45 26.0%	45 26.0%	18 10.4%	173 100.0%
Competitive intelligence	4.36 1.49	3 1.7%	21 12.1%	25 14.5%	40 23.1%	40 23.1%	33 19.1%	11 6.4%	173 100.0%
Marketing training	3.36 1.54	24 13.9%	34 19.7%	31 17.9%	40 23.1%	31 17.9%	10 5.8%	3 1.7%	173 100.0%
Marketing research	4.02 1.54	8 4.7%	23 13.4%	36 20.9%	37 21.5%	32 18.6%	30 17.4%	6 3.5%	172 100.0%
Marketing analytics	3.92 1.72	16 9.3%	27 15.7%	27 15.7%	32 18.6%	33 19.2%	28 16.3%	9 5.2%	172 100.0%
Marketing capabilities	4.81 1.29	4 2.3%	6 3.5%	11 6.4%	42 24.4%	53 30.8%	46 26.7%	10 5.8%	172 100.0%

Topic 8: Marketing Organization

Considering your company's marketing knowledge (i.e., marketing practices, customer insights, and marketing plans), rate your agreement with the following questions:

	Mean & SD	Strongly Disagree							Strongly Agree	Total
		1	2	3	4	5	6	7		
It is important to prevent competitors from acquiring our marketing knowledge	4.95 1.60	4 2.4%	10 6.1%	16 9.8%	31 18.9%	37 22.6%	31 18.9%	35 21.3%	164 100.0%	
There are very few disadvantages to protecting our marketing knowledge.	4.63 1.95	15 9.3%	16 9.9%	13 8.0%	27 16.7%	26 16.0%	29 17.9%	36 22.2%	162 100.0%	

Topic 7: Marketing Organization

How well has your company developed strong knowledge and skills in each digital marketing strategy area?

	Mean & SD	Not at all 1	2	3	4	5	6	Excellent 7	Total
For developing digital marketing strategies	4.29 1.74	17 10.6%	11 6.8%	21 13.0%	29 18.0%	40 24.8%	29 18.0%	14 8.7%	161 100.0%
For executing digital marketing strategies	4.27 1.67	15 9.3%	14 8.7%	16 9.9%	32 19.9%	44 27.3%	31 19.3%	9 5.6%	161 100.0%
For connecting marketing strategies and digital marketing strategies	4.30 1.68	15 9.3%	14 8.7%	15 9.3%	34 21.1%	40 24.8%	33 20.5%	10 6.2%	161 100.0%
For measuring the success of digital marketing strategies	3.94 1.78	22 13.7%	18 11.2%	21 13.0%	29 18.0%	37 23.0%	25 15.5%	9 5.6%	161 100.0%
For learning about what works and doesn't work for digital marketing	4.00 1.72	21 13.0%	15 9.3%	21 13.0%	29 18.0%	42 26.1%	27 16.8%	6 3.7%	161 100.0%
For managing external digital marketing partners and agencies	3.75 1.87	29 18.0%	20 12.4%	19 11.8%	31 19.3%	26 16.1%	28 17.4%	8 5.0%	161 100.0%

Topic 8: Marketing Organization

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% I	Median	Min	Maximum	Total
We build new marketing capabilities ourselves by training current or hiring new employees with the skills.	59.8	31.1	55.1 - 64.5	60	0	100	169
We partner with other marketing agencies to learn new marketing skills.	14.5	18.9	11.7 - 17.4	5	0	90	169
We partner with other consultancies to learn new marketing skills.	12.2	15.8	9.8 - 14.5	10	0	100	169
We partner with other companies to learn new marketing skills.	11.5	16.5	9.0 - 14.0	5	0	100	169
We buy other companies to acquire new marketing skills.	2.0	6.5	1.0 - 3.0	0	0	50	169

Topic 8: Marketing Organization

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

	Mean & SD	Not at all 1	2	3	4	5	6	All the time 7	Total
Is collected on a regular basis	4.97 1.84	10 6.1%	14 8.6%	12 7.4%	17 10.4%	33 20.2%	36 22.1%	41 25.2%	163 100.0%
Is shared vertically across different levels of the firm and business units	4.42 1.74	11 6.7%	18 11.0%	20 12.2%	25 15.2%	41 25.0%	30 18.3%	19 11.6%	164 100.0%
Is shared horizontally across different functions and business units	4.27 1.72	14 8.6%	14 8.6%	27 16.6%	25 15.3%	37 22.7%	34 20.9%	12 7.4%	163 100.0%
Shapes the design of firm strategies	4.61 1.58	6 3.7%	13 7.9%	21 12.8%	31 18.9%	38 23.2%	38 23.2%	17 10.4%	164 100.0%
Influences the implementation of firm strategies	4.79 1.50	6 3.7%	7 4.3%	19 11.6%	29 17.7%	43 26.2%	43 26.2%	17 10.4%	164 100.0%
Impacts the evaluation of firm strategies	4.75 1.52	8 4.9%	6 3.7%	14 8.6%	36 22.2%	43 26.5%	37 22.8%	18 11.1%	162 100.0%

Topic 9: Marketing Leadership

What percent your company's marketing strategy will be substantially different in five years?

Minimum = 0

Maximum = 100

Mean = 36.45

Median = 30

Standard Deviation (Unbiased Estimate) = 25.18

95 Percent Confidence Interval around the mean = 32.40 - 40.51

Valid cases = 148

Missing cases = 178

Response percent = 45.4%

Topic 9: Marketing Leadership

What is marketing primarily responsible for in your firm?

	Number	Percent	95% CI
Brand	148	91.4 %	± 4.4 %
Social media	134	82.7 %	± 5.9 %
Digital marketing	134	82.7 %	± 5.9 %
Advertising	129	79.6 %	± 6.3 %
Positioning	116	71.6 %	± 7.0 %
Promotion	116	71.6 %	± 7.0 %
Public relations	112	69.1 %	± 7.2 %
Marketing analytics	111	68.5 %	± 7.2 %
Marketing research	109	67.3 %	± 7.3 %
Lead generation	100	61.7 %	± 7.6 %
Insight	95	58.6 %	± 7.7 %
Competitive intelligence	95	58.6 %	± 7.7 %
Customer experience	74	45.7 %	± 7.8 %
Customer relationship management	68	42.0 %	± 7.7 %
Revenue Growth	65	40.1 %	± 7.6 %
Market entry strategies	63	38.9 %	± 7.6 %
New products	55	34.0 %	± 7.4 %
Pricing	50	30.9 %	± 7.2 %
Innovation	49	30.2 %	± 7.2 %
Sales	42	25.9 %	± 6.8 %
e-commerce	41	25.3 %	± 6.8 %
Market selection	41	25.3 %	± 6.8 %
Customer service	28	17.3 %	± 5.9 %
Distribution	14	8.6 %	± 4.4 %
Stock market performance	4	2.5 %	± 2.4 %
Total	1993		

Number of cases = 162

Number of responses = 1993

Average number of responses per case = 12.3

Number of cases with at least one response = 162

Response percent = 100.0 %

Topic 9: Marketing Leadership

How many direct and indirect reports do you have?

	Median	Mean	SD	Minimum	Maximum	Range	Total
How many direct reports do you have?	5	6.19	6.08	0	27.55	27.55	151
How many indirect reports (dotted-line) reports do you have?	6.50	35.38	77.37	0	387.17	387.17	141

Topic 9: Marketing Leadership**How many years have you been with this firm in your current role? In any role?**

	<u>Median</u>	<u>Mean</u>	<u>SD</u>	<u>Minimum</u>	<u>Maximum</u>	<u>Total</u>
In your current role?	5	6.67	5.74	0	19.51	152
In any role?	10	11.65	8.87	0	30	146

Topic 9: Marketing Leadership

How has marketing's role within your organization changed in the last five years?

	Number	Percent	95% CI
-7 = Significantly narrowed	1	0.6 %	± 0.6 %
-6	2	1.2 %	± 0.9 %
-5	1	0.6 %	± 0.6 %
-4	2	1.2 %	± 0.9 %
-3	3	1.9 %	± 1.0 %
-2	3	1.9 %	± 1.0 %
-1	2	1.2 %	± 0.9 %
0 = No Change	19	11.7 %	± 2.6 %
1	13	8.0 %	± 2.1 %
2	29	17.9 %	± 3.1 %
3	14	8.6 %	± 2.2 %
4	27	16.7 %	± 3.0 %
5	23	14.2 %	± 2.8 %
6	5	3.1 %	± 1.3 %
7 = Significantly broadened	18	11.1 %	± 2.5 %
Total	162	100.0 %	

Mean = 2.73

SD = 2.88

Missing cases = 164

Response percent = 49.7 %

Topic 9: Marketing Leadership**Do you feel pressure from your CEO or Board to prove the value of marketing?**

	Number	Percent	95% CI
Yes	160	59.9 %	± 5.5 %
No	107	40.1 %	± 5.1 %
Total	267	100.0 %	

Missing cases = 59

Response percent = 81.9 %

Topic 9: Marketing Leadership

Is this pressure increasing, decreasing, or about the same?

	Number	Percent	95% CI
+1 = Increasing pressure	82	51.6 %	± 7.8 %
0 = About the same amount of pressure	72	45.3 %	± 7.8 %
-1 = Decreasing pressure	5	3.1 %	± 2.7 %
Total	159	100.0 %	

Mean = 0.48

SD = 0.56

Missing cases = 1

Response percent = 99.4 %

Topic 9: Marketing Leadership

Has your company's use of online customer data increased, decreased, or stayed the same over the last two years?

	Number	Percent	95% CI
+1 = Increasing	99	62.7 %	± 5.0 %
0 = About the same	56	35.4 %	± 4.1 %
-1 = Decreasing	3	1.9 %	± 1.0 %
Total	158	100.0 %	

Mean = 0.61

SD = 0.53

Missing cases = 168

Response percent = 48.5 %

Topic 9: Marketing Leadership

Do you expect your company's use of online customer data to increase, decrease, or stay the same over the next two years?

	Number	Percent	95% CI
+1 = Increasing	112	70.0 %	± 5.2 %
0 = About the same	44	27.5 %	± 3.7 %
-1 = Decreasing	4	2.5 %	± 1.2 %

Total 160 100.0 %

Mean = 0.68

SD = 0.52

Missing cases = 166

Response percent = 49.1 %

Topic 9: Marketing Leadership

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	25	15.6 %	± 2.9 %
2=2	34	21.3 %	± 3.4 %
3=3	25	15.6 %	± 2.9 %
4=4	23	14.4 %	± 2.8 %
5=5	20	12.5 %	± 2.6 %
6=6	17	10.6 %	± 2.4 %
7=Very Worried	16	10.0 %	± 2.4 %
Total	160	100.0 %	

Mean = 3.59

SD = 1.93

Missing cases = 166

Response percent = 49.1 %

Topic 9: Marketing Leadership

Has your company's use of third-party customer data increased, decreased, or stayed the same over the last two years?

	Number	Percent	95% CI
+1 = Increasing	50	31.3 %	± 3.9 %
0 = About the same	95	59.4 %	± 5.0 %
-1 = Decreasing	15	9.4 %	± 2.3 %

Total 160 100.0 %

Mean = 0.22

SD = 0.60

Missing cases = 166

Response percent = 49.1 %

Topic 9: Marketing Leadership

Do you expect your company's use of third-party customer data to increase, decrease, or stay the same over the next two years?

	Number	Percent	95% CI
+1 = Increasing	47	29.7 %	± 3.9 %
0 = About the same	93	58.9 %	± 5.0 %
-1 = Decreasing	18	11.4 %	± 2.5 %

Total 158 100.0 %

Mean = 0.18

SD = 0.62

Missing cases = 168

Response percent = 48.5 %

Topic 9: Marketing Leadership

How worried are you that your company's use of third-party customer data could raise questions about privacy?

	Number	Percent	95% CI
1=Not at all Worried	30	18.9 %	± 3.2 %
2=2	29	18.2 %	± 3.1 %
3=3	31	19.5 %	± 3.2 %
4=4	21	13.2 %	± 2.7 %
5=5	19	11.9 %	± 2.6 %
6=6	12	7.5 %	± 2.1 %
7=Very Worried	17	10.7 %	± 2.4 %
Total	159	100.0 %	

Mean = 3.47

SD = 1.93

Missing cases = 167

Response percent = 48.8 %

Topic 9: Marketing Leadership**Do you believe it is appropriate for your brand to take a stance on politically-charged issues?**

	Number	Percent	95% CI
Yes	34	21.4 %	± 3.4 %
No	125	78.6 %	± 5.3 %
Total	159	100.0 %	

Missing cases = 167

Response percent = 48.8 %

Topic 9: Marketing Leadership

Which of the following reasons influenced your willingness to have your have brand to take a stance on politically-charged issues. Taking a stance may:

	Percent	95% CI
Show my company cares about more than making profits	75.8 %	± 15.4 %
Have a positive effect on my company's ability to attract and retain employees	69.7 %	± 16.6 %
Have a positive effect on my company's ability to attract and retain customers/partners	69.7 %	± 16.6 %
Have a positive effect on my company's ability to stand out in the marketplace	51.5 %	± 18.0 %

Number of cases = 33

Number of responses = 88

Average number of responses per case = 2.7

Number of cases with at least one response = 33

Response percent = 100.0 %

Topic 9: Marketing Leadership

Which of the following reasons influenced your willingness to have your have brand to take a stance on politically-charged issues. Taking a stance may:

	Percent	95% CI
Have a negative effect on my company's ability to attract and retain customers/partners	67.8 %	± 8.5 %
Make my company stand out in the marketplace in ways that we do not want	59.5 %	± 8.9 %
Show my company is wasting resources on non-core business activities	52.1 %	± 9.0 %
Have a negative effect on my company's ability to attract and retain employees	37.2 %	± 8.7 %

Number of cases = 121

Number of responses = 262

Average number of responses per case = 2.2

Number of cases with at least one response = 121

Response percent = 100.0 %

Topic 10: Marketing Analytics

What percent of your marketing budget do you spend on marketing analytics?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
...Do you currently spend on marketing analytics?	6.7	6.5	6.0 - 7.5	5	0	24.5	265
...Will you spend in on marketing analytics the next three years?	21.3	27.2	18.0 - 24.6	10	0	85	260

Topic 10: Marketing Analytics

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

Minimum = 0

Maximum = 100

Mean = 35.83

Median = 25

Standard Deviation (Unbiased Estimate) = 33.62

95 Percent Confidence Interval around the mean = 31.76 - 39.90

Valid cases = 262

Missing cases = 64

Response percent = 80.4%

Topic 10: 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	49	18.4 %	± 3.9 %
2=2	43	16.2 %	± 3.7 %
3=3	43	16.2 %	± 3.7 %
4=4	39	14.7 %	± 3.5 %
5=5	48	18.0 %	± 3.9 %
6=6	27	10.2 %	± 3.0 %
7=Very Highly	17	6.4 %	± 2.4 %
Total	266	100.0 %	

Mean = 3.54

SD = 1.85

Missing cases = 60

Response percent = 81.6 %

Topic 10: Marketing Analytics

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

	Number	Percent	95% CI
We prove the impact quantitatively	106	40.2 %	± 5.1 %
We have a good qualitative sense of the impact, but not a quantitative impact	119	45.1 %	± 5.3 %
We haven't been able to show the impact yet	39	14.8 %	± 3.5 %
Total	264	100.0 %	

Missing cases = 62

Response percent = 81.0 %

Topic 10: Marketing Analytics

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

	Number	Percent	95% CI
We prove the impact quantitatively	113	42.6 %	± 5.2 %
We have a good qualitative sense of the impact, but not a quantitative impact	100	37.7 %	± 5.0 %
We haven't been able to show the impact yet	52	19.6 %	± 4.0 %
Total	265	100.0 %	

Missing cases = 61

Response percent = 81.3 %

Topic 10: Marketing Analytics

What factors prevent your company from using more marketing analytics (check all that apply):

	Number	Percent	95% CI
Lack of process/tools to measure success through analytics	142	56.3 %	± 6.2 %
Lack of people who can link marketing analytics to marketing practice	120	47.6 %	± 6.2 %
Marketing analytics does not offer sufficient insight	73	29.0 %	± 5.6 %
Marketing analytics are not highly relevant to our decisions	62	24.6 %	± 5.4 %
Marketing analytics is overly complex	47	18.7 %	± 4.8 %
<u>Marketing analytics does not arrive when needed</u>	33	13.1 %	± 4.2 %
Total	477		

Number of cases = 252

Number of responses = 477

Average number of responses per case = 1.9

Number of cases with at least one response = 252

Response percent = 100.0 %

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

	Number	Percent	95% CI
B2B - Product	111	34.4 %	± 5.2 %
B2B - Services	102	31.6 %	± 5.1 %
B2C - Product	52	16.1 %	± 4.0 %
B2C - Services	58	18.0 %	± 4.2 %
Total	323	100.0 %	

Missing cases = 3

Response percent = 99.1 %

Appendix: Firm-level Descriptive Information

Which industry sector best describes your company? (Sorted by highest to lowest response)

	Number	Percent	95% CI
Technology [Software/Biotech]	57	17.7 %	± 4.1 %
Professional Services/Consulting	50	15.5 %	± 3.9 %
Manufacturing	43	13.4 %	± 3.7 %
Healthcare	33	10.2 %	± 3.3 %
Retail/Wholesale	29	9.0 %	± 3.1 %
Banking/Finance/Insurance	27	8.4 %	± 3.0 %
Communications/Media	22	6.8 %	± 2.7 %
Consumer Packaged Goods	17	5.3 %	± 2.4 %
Consumer Services	12	3.7 %	± 2.1 %
Education	10	3.1 %	± 1.9 %
Energy	8	2.5 %	± 1.7 %
Mining/Construction	7	2.2 %	± 1.6 %
Transportation	7	2.2 %	± 1.6 %
Total	322	100.0 %	

Missing cases = 4

Response percent = 98.8 %

Appendix: Firm-level Descriptive Information

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

	Number	Percent	Cumulative
Less than \$25 million	91	28.1 %	28.1 %
\$26-99 million	47	14.5 %	42.6 %
\$100-499 million	54	16.7 %	59.3 %
\$500-999 million	25	7.7 %	67.0 %
\$1-2.5 billion	35	10.8 %	77.8 %
\$2.6-5 billion	22	6.8 %	84.6 %
\$5.1-9.9 billion	12	3.7 %	88.3 %
\$10-49 billion	23	7.1 %	95.4 %
\$50-100 billion	8	2.5 %	97.8 %
More than \$100+ billion	7	2.2 %	100.0 %
Total	324	100.0 %	100.0 %