

The **CMO** Survey[®]

Topline Report

FEBRUARY 2019

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

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Overview of The CMO Survey®

About The CMO Survey

Mission

To collect and disseminate the opinions of top marketers in order to predict the future of markets, track marketing excellence, and improve the value of marketing in firms and society. The survey is an objective source of information about marketing and a non-commercial service dedicated to improving the field of marketing.

Administration

Founded in August 2008, The CMO Survey is administered twice a year. Questions repeat to observe trends over time and new questions are added to tap into marketing trends. The February 2019 survey is the 22st administration of The CMO Survey.

Sponsors

CMO Survey Sponsors include the American Marketing Association, Deloitte LLP, and Duke University's Fuqua School of Business. Sponsors support The CMO Survey with intellectual and financial resources. Survey data and participant lists are held in confidence and not provided to survey sponsors or any other parties.

The February 2019 CMO Survey

Survey sample

The sample of 2556 top marketers at U.S. for-profit companies: 323 responded for a 12.6% response rate; 97% of respondents were VP-level or above.

Survey administration

The survey was in field from January 8-29, 2019. It was administered via email with four follow-up reminders.

Available reports

This *Topline Report* offers an aggregate view of survey results. Two other reports are available at cmosurvey.org/results.

- *Highlights and Insights Report* shares key metrics over time
- *Report of Results by Firm and Industry Characteristics* offers results by sectors, size, and Internet sales

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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	34	20.1 %	± 3.4 %
2=No Change	40	23.7 %	± 3.6 %
1=Less	95	56.2 %	± 5.0 %
Total	169	100.0 %	

Mean = 1.64

SD = 0.80

Missing Cases = 154

Response Percent = 52.3 %

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 = 16.38

Maximum = 97.12

Mean = 57.00

Median = 60

Standard Deviation (Unbiased Estimate) = 19.86

95 Percent Confidence Interval Around the Mean = 53.98 - 60.02

Valid Cases = 166

Missing Cases = 157

Response Percent = 51.4%

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=164)

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	1.95 0.91	35 21.3%	15 9.1%	31 18.9%	81 49.4%
Superior product quality	2.04 0.84	36 22.0%	33 20.1%	40 24.4%	109 66.5%
Superior innovation	1.77 0.80	24 14.6%	17 10.4%	12 7.3%	53 32.3%
Excellent service	1.98 0.72	34 20.7%	60 36.6%	31 18.9%	125 76.2%
Trusting relationship	2.12 0.82	35 21.3%	39 23.8%	50 30.5%	124 75.6%

Topic 1: Marketplace Dynamics - Customers

Do you expect the following customer outcomes in the next 12 months?

(N=323)

	Mean SD	Increase +1	No Change 0	Decrease -1	Total
Customer's purchase volume	0.59 0.64	107 67.3%	39 24.5%	13 8.2%	159 100.0%
Customer's price per unit	0.29 0.72	72 45.0%	63 39.4%	25 15.6%	160 100.0%
Customer will buy related products/services from my firm	0.67 0.50	111 68.5%	49 30.2%	2 1.2%	162 100.0%
My firm's ability to retain current customers	0.40 0.70	84 52.2%	57 35.4%	20 12.4%	161 100.0%
The entry of new customers into this market	0.32 0.66	68 42.2%	76 47.2%	17 10.6%	161 100.0%
My firm's ability to acquire new customers	0.66 0.58	115 71.9%	36 22.5%	9 5.6%	160 100.0%

Topic 1: Marketplace Dynamics - Partners

Will you use a channel or go directly to market?

	Number	Percent	95% CI
Uses channel partners	239	74.0 %	± 4.8 %
Does not use channel partners	84	26.0 %	± 4.8 %
Total	323	100.0 %	

Missing Cases = 0
Response Percent = 100.0 %

Topic 1: Marketplace Dynamics - 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=239)

	Mean SD	Increase +1	No Change 0	Decrease -1	Total
Partner's purchase volume	0.61 0.66	52 70.3%	15 20.3%	7 9.5%	74 100.0%
Partner will buy related products/services from my firm	0.48 0.60	39 53.4%	30 41.1%	4 5.5%	73 100.0%
Partner's price per unit	0.26 0.66	28 37.8%	37 50.0%	9 12.2%	74 100.0%
My firm will sell directly to end customers, not through channel partners	0.25 0.70	30 40.0%	34 45.3%	11 14.7%	75 100.0%
Partner's level of power in our relationship	0.04 0.62	16 21.3%	46 61.3%	13 17.3%	75 100.0%

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/services in existing markets	55.1	31.1	50.3 - 59.9	65	0	100	158
New products/services in existing markets	21.8	21.1	18.5 - 25.1	20	0	100	158
Existing products/services in new markets	13.5	15.3	11.1 - 15.9	10	0	75	158
New products/services in new markets	9.6	14.2	7.4 - 11.8	5	0	100	158

Topic 2: Firm Growth Strategies

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

Minimum = 36.41

Maximum = 100

Mean = 86.99

Median = 99

Standard Deviation (Unbiased Estimate) = 19.98

95 Percent Confidence Interval Around the Mean = 83.93 - 90.05

Valid Cases = 164

Missing Cases = 159

Response Percent = 50.8%

Topic 2: Firm Growth Strategies

What percentage of your firm's sales is domestic?

Minimum = 32.07

Maximum = 100

Mean = 83.91

Median = 95

Standard Deviation (Unbiased Estimate) = 21.87

95 Percent Confidence Interval Around the Mean = 80.55 - 87.26

Valid Cases = 163

Missing Cases = 160

Response Percent = 50.5%

Topic 2: Firm Growth Strategies

Which international market is currently your largest (in terms of sales)?*

	Number	Percent	95% CI
Western Europe	27	34.6 %	± 10.6 %
Canada	15	19.2 %	± 8.8 %
China	10	12.8 %	± 7.4 %
Middle East	4	5.1 %	± 4.9 %
South American countries besides Brazil	4	5.1 %	± 4.9 %
Australia/New Zealand	4	5.1 %	± 4.9 %
Mexico	3	3.8 %	± 4.3 %
Northern Europe	3	3.8 %	± 4.3 %
Japan	2	2.6 %	± 3.5 %
Indonesia and Southeast Asia	2	2.6 %	± 3.5 %
Central America	2	2.6 %	± 3.5 %
Russia	1	1.3 %	± 2.5 %
Brazil	1	1.3 %	± 2.5 %
Total	78	100.0 %	

Missing Cases = 2

Response Percent = 97.5 %

* Responses from firms that have at least 1% of total sales from international markets and allocate at least 1% of total marketing budgets to international markets.

Topic 2: Firm Growth Strategies

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

	Number	Percent	95% CI
China	18	21.7 %	± 8.0 %
Western Europe	12	14.5 %	± 6.8 %
Brazil	8	9.6 %	± 5.7 %
India	7	8.4 %	± 5.4 %
Northern Europe	5	6.0 %	± 4.6 %
Middle East	5	6.0 %	± 4.6 %
Mexico	5	6.0 %	± 4.6 %
Indonesia and Southeast Asia	4	4.8 %	± 4.1 %
South American countries besides Brazil	4	4.8 %	± 4.1 %
Korea	4	4.8 %	± 4.1 %
Central America	3	3.6 %	± 3.6 %
South Africa	2	2.4 %	± 3.0 %
Australia/New Zealand	1	1.2 %	± 2.1 %
Russia	1	1.2 %	± 2.1 %
Eastern Europe	1	1.2 %	± 2.1 %
Canada	1	1.2 %	± 2.1 %
Taiwan	1	1.2 %	± 2.1 %
Japan	1	1.2 %	± 2.1 %
Total	83	100.0 %	

Missing Cases = 12

Response Percent = 87.4 %

* Responses from firms allocate at least 1% of total marketing budgets to international markets.

Topic 2: Firm Growth Strategies**What percentage of your firm's sales are through the internet?**

Minimum = 0

Maximum = 56.63

Mean = 9.93

Median = 1

Standard Deviation (Unbiased Estimate) = 17.17

95 Percent Confidence Interval Around the Mean = 8.01 - 11.85

Valid Cases = 307

Missing Cases = 16

Response Percent = 95.0%

Topic 3: Marketing Spending

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

Minimum = -43.08

Maximum = 54.90

Mean = 4.99

Median = 1

Standard Deviation (Unbiased Estimate) = 17.01

95 Percent Confidence Interval Around the Mean = 2.53 - 7.46

Valid Cases = 183

Missing Cases = 140

Response Percent = 56.7%

Topic 3: Marketing Spending

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

Minimum = -31.16

Maximum = 49.26

Mean = 8.32

Median = 5

Standard Deviation (Unbiased Estimate) = 14.90

95 Percent Confidence Interval Around the Mean = 6.12 - 10.52

Valid Cases = 176

Missing Cases = 147

Response Percent = 54.5%

Topic 3: Marketing Spending

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	14.3	17.9	11.5 - 17.0	10	-31.7	62.3	163
Traditional advertising spending	-1.8	14.3	-4.0 - 0.4	0	-44.9	42.1	159
Brand building	9.3	15.6	6.8 - 11.7	5	-34.8	54.9	158
Customer relationship management	9.2	12.5	7.3 - 11.2	5	-15	45.5	155
New product introductions	7.7	13.4	5.6 - 9.8	5	-32.7	49.4	158
New service introductions	6.6	12.2	4.7 - 8.5	0.5	-32.1	47	157

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% CI</u>
Marketing training	-25.5%	32.9%	3.44%	0	8.41	2.08 - 4.80
Marketing research and intelligence	-32.2%	49.7%	7.71%	2.50	14.91	5.33-10.09
Marketing consulting services	-39.1%	60.3%	8.67%	3	18.28	5.78-11.56
Developing new marketing knowledge and capabilities	-15	51.1%	10.36%	5	14.50	8.06-12.67

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 23.06

Mean = 4.74

Median = 3

Standard Deviation (Unbiased Estimate) = 5.28

95 Percent Confidence Interval Around the Mean = 3.95 - 5.53

Valid Cases = 171

Missing Cases = 152

Response Percent = 52.9%

Topic 4: Firm Performance

Rate your firm's performance during the last 12 months

	Mean	SD	95% CI	Median	Total
Market share	3.0	4.4	2.3 - 3.7	3	164
Sales revenue	4.5	5.8	3.6 - 5.4	5	161
Marketing ROI	3.7	4.6	3.0 - 4.4	3	158
Profits	4.2	5.5	3.3 - 5.0	5	158
Customer acquisition	3.8	4.7	3.0 - 4.5	3	156
Customer retention	2.1	4.5	1.4 - 2.8	1	158
Brand value	3.8	4.2	3.1 - 4.4	3	156

Topic 4: Firm Performance

Overall, how would you rate your company's marketing excellence?

	Number	Percent	95% CI
7=Excellent - one of the best in the world	16	9.1 %	± 2.4 %
6=A leader but not one of the best	31	17.6 %	± 3.2 %
5=Strong	49	27.8 %	± 3.9 %
4=Good	45	25.6 %	± 3.8 %
3=Fair	23	13.1 %	± 2.8 %
2=Weak	8	4.5 %	± 1.7 %
1=Very weak	4	2.3 %	± 1.2 %
Total	176	100.0 %	

Mean = 4.61

SD = 1.40

Missing Cases = 147

Response Percent = 54.5 %

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?	11.4	11.8	9.9 - 13.0	5.5	227
...will you spend in the next 12 months?	13.6	13.3	11.9 - 15.4	10	226
...do you predict you will spend in five years?	19.7	16.6	17.5 - 21.9	15	225

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

Minimum = 0

Maximum = 87.23

Mean = 23.00

Median = 5

Standard Deviation (Unbiased Estimate) = 30.42

95 Percent Confidence Interval Around the Mean = 19.06 - 26.94

Valid Cases = 229

Missing Cases = 94

Response Percent = 70.9%

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	41	16.6 %	± 3.7 %
2=	56	22.7 %	± 4.2 %
3=	37	15.0 %	± 3.5 %
4=	48	19.4 %	± 3.9 %
5=	43	17.4 %	± 3.7 %
6=	17	6.9 %	± 2.5 %
7=Very Highly	5	2.0 %	± 1.4 %
Total	247	100.0 %	

Mean = 3.27

SD = 1.63

Missing Cases = 76

Response Percent = 76.5 %

Topic 5: Social Media

How does your firm use social media? (Check all that apply)

	Number	Percent	95% CI
Brand awareness and brand-building	210	88.2 %	± 4.1 %
Introducing new products and services	154	64.7 %	± 6.1 %
Acquiring new customers	143	60.1 %	± 6.3 %
Brand promotions, such as contests, coupons	141	59.2 %	± 6.3 %
Retaining current customers	132	55.5 %	± 6.4 %
Improving customer service	97	40.8 %	± 6.3 %
Improving employee engagement	84	35.3 %	± 6.1 %
Marketing research	80	33.6 %	± 6.0 %
Identifying new customer groups we currently don't target	61	25.6 %	± 5.6 %
Identifying new product and service opportunities	41	17.2 %	± 4.8 %
<u>Improving current products or services</u>	<u>33</u>	<u>13.9 %</u>	<u>± 4.4 %</u>
Total	1176		

Number of Cases = 238

Number of Responses = 1176

Average Number of Responses Per Case = 4.9

Topic 5: Social Media

How is your paid digital media allocated across the following channels?

	Mean	SD	95%CI	Median	Min	Max
Paid other	31.4	37.9	23.6 - 39.2	10	0	100
Paid search (all engines)	27.6	27.6	22.0 - 33.3	21	0	100
Paid display (including programmatic)	16.4	20.4	12.3 - 20.6	10	0	100
Paid social	14.0	17.2	10.5 - 17.5	10	0	100
Paid video (including programmatic, full episode players)	7.2	9.7	5.2 - 9.2	4	0	50

Topic 6: Mobile Marketing

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

	Mean	SD	95% CI	Median	Minimum	Maximum
What percent of your marketing budget do you currently spend on mobile activities?	11.2	14.1	9.4 - 13.0	5	0	46.5
What percent will you spend on mobile activities in five years?	19.1	18.9	16.6 - 21.6	10	0	62.1

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	76	31.9 %	± 4.7 %
2=	36	15.1 %	± 3.5 %
3=	32	13.4 %	± 3.3 %
4=	36	15.1 %	± 3.5 %
5=	35	14.7 %	± 3.4 %
6=	17	7.1 %	± 2.5 %
7=Very Highly	6	2.5 %	± 1.5 %
Total	238	100.0 %	

Mean = 2.97

SD = 1.80

Missing Cases = 85

Response Percent = 73.7 %

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 = -35.53

Maximum = 48.67

Mean = 5.12

Median = 0

Standard Deviation (Unbiased Estimate) = 14.32

95 Percent Confidence Interval Around the Mean = 2.92 - 7.31

Valid Cases = 163

Missing Cases = 160

Response Percent = 50.5%

Topic 7: Marketing Jobs

For your marketing hiring, distribute 100 points across these different types of employees you plan to hire in the next year.

	Mean	SD	95% CI	Median	Minimum	Maximum
Full-time employees	80.0	27.0	73.4 - 86.6	90	0	100
Part-time independent subcontractors	8.7	20.6	3.7 - 13.7	0	0	100
Full-time independent subcontractors	5.2	10.6	2.6 - 7.8	0	0	50
Part-time employees	3.0	6.5	1.5 - 4.6	0	0	30

Topic 7: Marketing Jobs

Distributing 100 points, how often will you acquire marketing talent from these sources?

	Mean	SD	95% CI	Median	Minimum	Maximum
From companies in other industries	34.9	31.8	27.3 - 42.4	30	0	100
From competitors in your industry	26.9	30.0	19.8 - 34.1	20	0	100
From within your company	23.4	29.6	16.3 - 30.4	10	0	100
From undergraduate programs in universities	7.8	16.9	3.8 - 11.9	0	0	100
From Master's or above programs in universities	5.6	11.1	3.0 - 8.2	0	0	60

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

Minimum = -31.23

Maximum = 38.62

Mean = 3.87

Median = 0

Standard Deviation (Unbiased Estimate) = 12.12

95 Percent Confidence Interval Around the Mean = 2.00 - 5.73

Valid Cases = 162

Missing Cases = 161

Response Percent = 50.2%

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Number of employees	4022	9751	2502 - 5543	500	0	55921	158
Number of marketing employees	65	193	35 - 95	10	0	1465	159

Topic 8: Marketing Organization

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

(N=323)

	Mean SD	Poor 1	2	3	4	5	6	Excellent 7	Total
Customer insights	4.72 1.61	11 6.2%	5 2.8%	21 11.8%	35 19.7%	44 24.7%	38 21.3%	24 13.5%	178 100.0%
Competitive intelligence	4.41 1.46	7 3.9%	14 7.8%	22 12.3%	44 24.6%	51 28.5%	30 16.8%	11 6.1%	179 100.0%
Marketing training	3.20 1.50	34 19.1%	28 15.7%	30 16.9%	50 28.1%	28 15.7%	7 3.9%	1 0.6%	178 100.0%
Marketing research	4.02 1.57	12 6.7%	20 11.2%	29 16.3%	52 29.2%	34 19.1%	19 10.7%	12 6.7%	178 100.0%
Marketing analytics	4.04 1.69	15 8.4%	23 12.8%	25 14.0%	45 25.1%	31 17.3%	27 15.1%	13 7.3%	179 100.0%
Marketing capabilities	4.81 1.45	6 3.4%	7 3.9%	19 10.7%	34 19.1%	43 24.2%	55 30.9%	14 7.9%	178 100.0%

Topic 9: Marketing Leadership

What is marketing primarily responsible for in your firm?

	Number	Percent	95% CI
Brand	180	90.9 %	± 4.0 %
Digital marketing	165	83.3 %	± 5.2 %
Advertising	159	80.3 %	± 5.6 %
Social media	153	77.3 %	± 5.9 %
Positioning	142	71.7 %	± 6.3 %
Promotion	142	71.7 %	± 6.3 %
Marketing analytics	142	71.7 %	± 6.3 %
Marketing research	138	69.7 %	± 6.5 %
Lead generation	129	65.2 %	± 6.7 %
Public relations	120	60.6 %	± 6.9 %
Insight	107	54.0 %	± 7.0 %
Competitive intelligence	103	52.0 %	± 7.0 %
Revenue growth	86	43.4 %	± 7.0 %
Customer experience	84	42.4 %	± 6.9 %
Innovation	65	32.8 %	± 6.6 %
Market entry strategies	64	32.3 %	± 6.6 %
e-commerce	63	31.8 %	± 6.5 %
New products	62	31.3 %	± 6.5 %
Customer relationship management	62	31.3 %	± 6.5 %
Market selection	53	26.8 %	± 6.2 %
Pricing	51	25.8 %	± 6.1 %
Sales	49	24.7 %	± 6.1 %
Customer service	31	15.7 %	± 5.1 %
Distribution	14	7.1 %	± 3.6 %
Stock market performance	6	3.0 %	± 2.4 %
Total	2370		

Number of Cases = 198

Number of Responses = 2370

Average Number of Responses Per Case = 12.0

Number Of Cases with at least one Response = 198

Response Percent = 100.0 %

Topic 9: Marketing Leadership

What are your top challenges as a marketing leader? (Select top 3 where 1 is most important)

(N=277)

	Mean & SD	1	2	3	Total
Driving Growth	1.62 0.78	105 37.9%	46 16.6%	34 12.3%	185 66.8%
Securing marketing budget	1.80 0.88	37 13.4%	15 5.4%	22 7.9%	74 26.7%
Hiring top talent	1.96 0.82	27 9.7%	26 9.4%	24 8.7%	77 27.8%
Finding sponsorship/support from the executive level	2.03 0.82	9 3.2%	10 3.6%	10 3.6%	29 10.5%
Delivering a powerful brand that breaks through the clutter	2.06 0.78	38 13.7%	56 20.2%	46 16.6%	140 50.5%
Providing ROI of marketing activities	2.09 0.75	30 10.8%	55 19.9%	41 14.8%	126 45.5%
Generating customer insight	2.19 0.77	14 5.1%	24 8.7%	26 9.4%	64 23.1%
Managing our online presence	2.39 0.79	7 2.5%	9 3.2%	22 7.9%	38 13.7%
Identifying the right technologies to meet our needs	2.42 0.70	8 2.9%	22 7.9%	35 12.6%	65 23.5%
Training our team	2.45 0.62	2 0.7%	13 4.7%	16 5.8%	31 11.2%

Topic 9: Marketing Leadership**How well is your role as a marketing leader defined in your company?**

	Number	Percent	95% CI
Ambiguous	41	14.2 %	± 3.7 %
Reasonably defined	141	48.8 %	± 5.4 %
Very clear	107	37.0 %	± 5.2 %
Total	289	100.0 %	

Missing Cases = 34

Response Percent = 89.5 %

Topic 9: Marketing Leadership

Most companies have their own “language of the C-suite” that is vital to driving business results. Considering the language of your own company’s C-suite, which of the following marketing leadership activities do you find challenging to implement on a regular basis? (Check all that you find challenging)

	Number	Percent	95% CI
Demonstrating the impact of marketing actions on financial outcomes	176	63.8 %	± 5.7 %
Infusing the customer's point of view in business decisions	109	39.5 %	± 5.8 %
Communicating the role of the brand in business decisions	103	37.3 %	± 5.7 %
Linking marketing investments to important business objectives	99	35.9 %	± 5.7 %
Securing cross-functional support for new marketing investments	96	34.8 %	± 5.7 %
Using business terminology that resonates outside of the marketing function	35	12.7 %	± 4.0 %
Total	618		

Number of Cases = 276

Number of Responses = 618

Average Number of Responses Per Case = 2.2

Number of Cases with at least one Response = 276

Response Percent = 100.0 %

Topic 9: Marketing Leadership**Does your current CEO have experience as a marketer?**

	Number	Percent	95% CI
Yes	70	35.9 %	± 4.5 %
No	125	64.1 %	± 5.4 %
Total	195	100.0 %	

Missing Cases = 128

Response Percent = 60.4 %

Topic 9: Marketing Leadership

How likely is a marketer to become a CEO in your company?

	Number	Percent	95% CI
Never	29	14.9 %	± 3.1 %
Unlikely	94	48.2 %	± 5.0 %
Likely	48	24.6 %	± 3.9 %
Very Likely	24	12.3 %	± 2.9 %
Total	195	100.0 %	

Missing Cases = 128

Response Percent = 60.4 %

Topic 9: Marketing Leadership

How does your marketing leader's total compensation breakdown across the following categories (Sum to 100%):

	Mean	SD	95% CI	Median	Minimum	Maximum
Salary	70.9%	20.2	67.6 - 74.1	75	0	100
Performance Bonus	18.9%	14.3	16.6 - 21.2	20	0	100
Company Equity	8.2%	12.0	6.3 - 10.2	0	0	60
Other	2.0%	11.8	0.1 - 4.0	0	0	100

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	55	19.2 %	± 4.1 %
No	232	80.8 %	± 4.9 %
Total	287	100.0 %	

Missing Cases = 36
Response Percent = 88.9 %

Topic 10: Marketing Analytics

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

	Mean	SD	95% CI	Median	Minimum	Maximum
...Do you currently spend on marketing analytics?	6.6	6.7	5.7 - 7.6	5	0	24.7
...Will you spend in on marketing analytics the next three years?	11.3	10.5	9.9 - 12.8	10	0	41

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 = 43.45

Median = 50

Standard Deviation (Unbiased Estimate) = 34.95

95 Percent Confidence Interval Around the Mean = 38.65 - 48.24

Valid Cases = 204

Missing Cases = 119

Response Percent = 63.2%

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	27	12.9 %	± 3.0 %
2=2	28	13.4 %	± 3.1 %
3=3	23	11.0 %	± 2.8 %
4=4	35	16.7 %	± 3.4 %
5=5	43	20.6 %	± 3.7 %
6=6	32	15.3 %	± 3.3 %
7=Very Highly	21	10.0 %	± 2.7 %
Total	209	100.0 %	

Mean = 4.05

SD = 1.88

Missing Cases = 114

Response Percent = 64.7 %

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	76	36.4 %	± 4.7 %
We have a good qualitative sense of the impact, but not a quantitative impact	106	50.7 %	± 5.2 %
We haven't been able to show the impact yet	27	12.9 %	± 3.0 %
Total	209	100.0 %	

Missing Cases = 114

Response Percent = 64.7 %

Topic 10: Marketing Analytics**In what percent of the time do you perform experiments to understand the impact of your marketing actions on customers?**

Minimum = 0

Maximum = 100

Mean = 31.93

Median = 25

Standard Deviation (Unbiased Estimate) = 26.78

95 Percent Confidence Interval Around the Mean = 28.22 - 35.63

Valid Cases = 201

Missing Cases = 122

Response Percent = 62.2%

Topic 10: Marketing Analytics

To what extent is your company implementing artificial intelligence or machine learning into its marketing toolkit?

(N=323)

	Mean & SD	1=Not at all 1	2 2	3 3	4 4	5 5	6 6	7=Very Important 7	Total
Currently	1.93 1.52	126 60.3%	36 17.2%	18 8.6%	11 5.3%	8 3.8%	3 1.4%	7 3.3%	209 100.0%
Next three years	3.48 1.96	45 22.1%	27 13.2%	41 20.1%	28 13.7%	24 11.8%	18 8.8%	21 10.3%	204 100.0%

Topic 10: Marketing Analytics

How is your company using artificial intelligence in its marketing activities? (Check all that apply)

	Number	Percent	95% CI
Content personalization	65	56.5 %	± 9.2 %
Predictive analytics for customer insights	65	56.5 %	± 9.2 %
Targeting decisions	57	49.6 %	± 9.3 %
Customer segmentation	47	40.9 %	± 9.1 %
Programmatic advertising and media buying (i.e., AI buys ad space to target customer in real-time)	44	38.3 %	± 9.0 %
Improving marketing ROI by optimizing marketing content and timing	39	33.9 %	± 8.8 %
Conversational AI for customer service (i.e., chatbots, virtual assistants)	29	25.2 %	± 8.1 %
Next best offer	17	14.8 %	± 6.6 %
Augmented and virtual reality	12	10.4 %	± 5.7 %
Autonomous objects/systems (i.e., personal assistance robots, delivery drones, self-driving cars)	3	2.6 %	± 3.0 %
Facial recognition and visual search	2	1.7 %	± 2.4 %
<u>Biometrics also known as chipping (i.e., body or hand implants)</u>	<u>0</u>	<u>0.0 %</u>	<u>± 0.0 %</u>
Total	380		

Number of Cases = 115

Number of Responses = 380

Average Number of Responses Per Case = 3.3

Number Of Cases with at least one Response = 115

Response Percent = 100.0 %

Topic 11: The CMO Survey Award for Marketing Excellence

Which company in your industry sets the standard for excellence in marketing? - Overall Winner

Apple, Inc.

Topic 11: The CMO Survey Award for Marketing Excellence

Which company across all industries sets the standard for excellence in marketing? - Industry-Specific Winners

Retail: Amazon

Technology: Microsoft, Adobe, and Salesforce

Consumer Packaged Goods: Nike, Coca-Cola, Inc, and Proctor & Gamble

Appendix: Firm-level Descriptive Information

Which economic sector accounts for the majority of your company revenues?

	Number	Percent	95% CI
B2B - Product	116	36.1 %	± 5.3 %
B2B - Services	103	32.1 %	± 5.1 %
B2C - Product	48	15.0 %	± 3.9 %
B2C - Services	54	16.8 %	± 4.1 %
Total	321	100.0 %	

Missing Cases = 2

Response Percent = 99.4 %

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]	48	14.9 %	± 3.9 %
Professional Services/Consulting	47	14.6 %	± 3.9 %
Manufacturing	37	11.5 %	± 3.5 %
Healthcare	32	9.9 %	± 3.3 %
Retail/Wholesale	32	9.9 %	± 3.3 %
Banking/Finance/Insurance	30	9.3 %	± 3.2 %
Consumer Packaged Goods	25	7.8 %	± 2.9 %
Communications/Media	23	7.1 %	± 2.8 %
Consumer Services	16	5.0 %	± 2.4 %
Transportation	11	3.4 %	± 2.0 %
Education	9	2.8 %	± 1.8 %
Mining/Construction	8	2.5 %	± 1.7 %
Energy	4	1.2 %	± 1.2 %
Total	322	100.0 %	

Missing Cases = 1

Response Percent = 99.7 %

Appendix: Firm-level Descriptive Information

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

	Number	Percent	Cumulative
Less than \$25 million	98	31.5 %	31.5 %
\$26-99 million	35	11.3 %	42.8 %
\$100-499 million	50	16.1 %	58.8 %
\$500-999 million	24	7.7 %	66.6 %
\$1-2.5 billion	36	11.6 %	78.1 %
\$2.6-5 billion	23	7.4 %	85.5 %
\$5.1-9.9 billion	13	4.2 %	89.7 %
\$10-49 billion	24	7.7 %	97.4 %
\$50-100 billion	3	1.0 %	98.4 %
<u>More than \$100+ billion</u>	<u>5</u>	<u>1.6 %</u>	<u>100.0 %</u>
Total	311	100.0 %	100.0 %

Missing Cases = 12

Response Percent = 96.3 %