DIGITAL DISTRESS:
What Keeps Marketers Up at Night?
Methodology

- Online survey among a total of 1,000 US marketers.
- Data collected between August 26 and September 11, 2013 by ResearchNow.
- Margin of error at the 95% confidence level for the total sample is +/- 3.1%.
- Data was also broken out by the following sub-groups:
  - Marketing Staff (n=499) vs. Marketing Decision Makers (n=436)
  - Digital Marketers (n=263) vs. Marketing Generalists (n=754)
For the purposes of this study, we divided marketers into four categories:

- **Staff** vs. **Decision Makers**
  - lower-level, execution employees
  - higher-level employees

- **Digital Marketers** vs. **Marketing Generalists**
  - primarily digital-focused
  - mostly traditional, some digital

All data self-reported by respondents.
WHAT WE LEARNED
The marketing profession has **changed dramatically**

- Seventy-six percent of marketers think marketing has changed more in the past two years than the past 50. *(slide 10)*

Marketers express doubt about their **skills, effectiveness and ability to measure impact**

- Marketers are not confident in their digital ability. Only 48% of digital marketers feel highly proficient in digital marketing. *(slide 14)*
- Marketers have low confidence in their companies’ marketing performance. Only 40% think their company’s marketing is effective. *(slide 9)*
- Sixty-eight percent of marketing professionals feel more pressured to show return on investment on marketing spend. *(slide 22)*
- Most digital marketers don’t have formal training; 82% learn on the job. *(slide 27)*
- Only 9% of respondents strongly agree with the statement “I know our digital marketing is working.” *(slide 23)*
Strong business performance is highly correlated with digital marketing proficiency

• High-performing companies are twice as likely to rate their company as highly proficient in digital marketing (50%) than lower performing companies (25%). (slide 45)

• There is a significant gap (47%) between perceived importance and actual performance when it comes to marketing measurement. Seventy-six percent of marketers believe measurement is important vs. 29% who believe they are doing it well. (slide 34)

Marketers are most concerned about...

• The issues of the greatest concern for marketers are: reaching their customers (82%), understanding whether their campaigns are working (79%), followed closely by proving campaign effectiveness (77%) and demonstrating marketing return on investment (75%). (slide 49)

• Sixty-six percent of all marketers think companies won’t succeed unless they have a digital marketing approach. (slide 51)
1. THE CHANGING MARKETING LANDSCAPE
Marketers do not think they significantly influence business strategy.

Only 44% say their marketing departments have a great deal of influence over their organization’s overall business strategy.

Q5. How much does your marketing department influence your organization’s overall business strategy? Base: TOTAL (n=1017)
They have low confidence in their companies’ marketing performance.

Only 40% think their company’s marketing is effective.

Q4. On a 0 to 10 scale where 0 is NOT AT ALL EFFECTIVE and 10 is EXTREMELY EFFECTIVE how effective is your company overall in terms of marketing? TOP 3 BOX
Base: TOTAL (n=1017)
Most marketers agree:

1. Marketing has value and that value can be measured
   
   AGREEMENT:
   - ALL MARKETERS: 81%
   - MARKETING STAFF: 83%
   - DECISION MAKERS: 78%
   - DIGITAL MARKETERS: 81%
   - MARKETING GENERALISTS: 81%

2. Marketing has changed more in the last 2 years than in the last 50
   
   AGREEMENT:
   - ALL MARKETERS: 76%
   - MARKETING STAFF: 77%
   - DECISION MAKERS: 76%
   - DIGITAL MARKETERS: 77%
   - MARKETING GENERALISTS: 76%

3. For most companies, digital marketing approaches are in a constant cycle of trial and error
   
   AGREEMENT:
   - ALL MARKETERS: 61%
   - MARKETING STAFF: 61%
   - DECISION MAKERS: 62%
   - DIGITAL MARKETERS: 60%
   - MARKETING GENERALISTS: 61%

Q10. Please indicate whether you agree or disagree with the following statements: TOP 2 BOX Base: TOTAL (n=1017) MARKETING STAFF (n=499) MKTING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
2. MARKETERS’ CONCERNS
Marketers do not have a clear consensus on what areas to focus on in the future

<table>
<thead>
<tr>
<th>Area</th>
<th>ALL MARKETERS</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media Marketing</td>
<td>13%</td>
<td>14%</td>
<td>12%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing programs</td>
<td>11%</td>
<td>10%</td>
<td>12%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Digital Advertising</td>
<td>11%</td>
<td>13%</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Content Marketing</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Brand Building</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Events</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Public Relations</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q16. Which one area do you think will be the most important to marketers in the next 3 years? (Select ONE only)
Base: TOTAL (n=1017)
60% of marketers expect their companies will invest more in digital marketing technology this year.

That investment is not being matched with marketer confidence.

Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. Base: TOTAL (n=1017)
Less than half of digital marketers feel highly proficient in digital marketing.

Generalists are even less confident.

- **48%** of digital marketers feel highly proficient (TOP 2 BOX)
- **37%** of marketing generalists feel highly proficient (TOP 2 BOX)

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
Just one in three marketers think their companies are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX Base: ALL MARKETERS (n=1,017)
Only two out of five marketers think their colleagues and peers are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?
TOP 2 BOX Base: ALL MARKETERS (n=1,017)
Marketers skeptical of team proficiency

Of all marketers...

• **39%** say that they are highly proficient in digital marketing.

• **40%** say that their marketing colleagues/team are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?

<table>
<thead>
<tr>
<th></th>
<th>SELF</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARKETING STAFF</td>
<td>MARKETING DECISION MAKERS</td>
</tr>
<tr>
<td>n=499</td>
<td>n=436</td>
</tr>
<tr>
<td>40%</td>
<td>40%</td>
</tr>
</tbody>
</table>

| DIGITAL MARKETERS    | MARKETING GENERALISTS                     |
| n=263                | n=754                                     |
| 48%                  | 37%                                       |

<table>
<thead>
<tr>
<th>MARKETING COLLEAGUES/TEAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARKETING STAFF</td>
</tr>
<tr>
<td>MARKETING DECISION MAKERS</td>
</tr>
<tr>
<td>n=436</td>
</tr>
<tr>
<td>43%</td>
</tr>
</tbody>
</table>

| DIGITAL MARKETERS    | MARKETING GENERALISTS                     |
| n=263                | n=754                                     |
| 45%                  | 39%                                      |

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?

TOP 2 BOX Base: DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
Confidence in companies even lower

Of all marketers...

• **34%** say that their company is highly proficient in digital marketing.

• **40%** say that their industry peers are highly proficient in digital marketing.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise?

<table>
<thead>
<tr>
<th></th>
<th>Marketing Staff n=499</th>
<th>Marketing Decision Makers n=436</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Digital Marketers n=263</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>Industry Peers</td>
<td>47%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX Base: TOTAL (n=1017)
## Low confidence in e-commerce, targeting and measurement

### ALL MARKETERS: HOW WELL EQUIPPED DO YOU FEEL TO EXECUTE THE FOLLOWING? (WELL-EQUIPPED, TOP 2 BOX)

<table>
<thead>
<tr>
<th>Activity</th>
<th>ALL MARKETERS</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Building</td>
<td>70%</td>
<td>70%</td>
<td>66%</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Creativity and Innovation in marketing</td>
<td>63%</td>
<td>61%</td>
<td>61%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Content Marketing</td>
<td>62%</td>
<td>61%</td>
<td>64%</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>62%</td>
<td>59%</td>
<td>63%</td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>Public Relations</td>
<td>59%</td>
<td>57%</td>
<td>60%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Digital Advertising</td>
<td>58%</td>
<td>59%</td>
<td>56%</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>58%</td>
<td>58%</td>
<td>56%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Social Marketing</td>
<td>57%</td>
<td>58%</td>
<td>56%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>55%</td>
<td>54%</td>
<td>55%</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>55%</td>
<td>56%</td>
<td>53%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>54%</td>
<td>56%</td>
<td>53%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>53%</td>
<td>53%</td>
<td>51%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>E-Commerce</td>
<td>43%</td>
<td>42%</td>
<td>45%</td>
<td>48%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Differences that are statistically significant are indicated in **bold**

Q14. How well equipped do you feel to execute the following?

**TOP 2 BOX Base: TOTAL (n=1017)**
Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. Base: TOTAL (n=1017)

- Investing in digital channels/programs
  - More than last year: 58%
  - Same as last year: 36%
  - Less than last year: 5%

- Investing in digital marketing technology
  - More than last year: 60%
  - Same as last year: 35%
  - Less than last year: 6%

- Hiring staff with digital expertise
  - More than last year: 45%
  - Same as last year: 46%
  - Less than last year: 9%

Digital capital investment expected to increase
Ultimately, **61%** of all marketers think that, for most companies, digital marketing approaches are a constant cycle of trial and error.

Q10. Please indicate whether you agree or disagree with the following statements: TOP & BOTTOM 2 BOX Base: TOTAL (n=1017)
### Marketers feeling pressure of ROI emphasis

**Q17. Please rate each of the following statements based on whether you agree or disagree: TOP 2 BOX**

<table>
<thead>
<tr>
<th>Statement</th>
<th>ALL MARKETERS: DO YOU AGREE WITH THESE STATEMENTS? (YES, TOP 2 BOX)</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is more pressure to show return on investment on marketing spend.</td>
<td>68%</td>
<td>72%</td>
<td>66%</td>
<td>69%</td>
<td>68%</td>
</tr>
<tr>
<td>We won’t succeed unless we have a successful digital marketing approach.</td>
<td>66%</td>
<td>68%</td>
<td>62%</td>
<td>72%</td>
<td>63%</td>
</tr>
<tr>
<td>I know our marketing is working.</td>
<td>59%</td>
<td>58%</td>
<td>61%</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>I have the digital skills and tools necessary to do my job effectively.</td>
<td>58%</td>
<td>59%</td>
<td>58%</td>
<td>62%</td>
<td>57%</td>
</tr>
<tr>
<td>We are under pressure to move to digital faster.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I know my digital marketing is working.</td>
<td>48%</td>
<td>47%</td>
<td>48%</td>
<td>53%</td>
<td>46%</td>
</tr>
<tr>
<td>I know more about digital marketing than my manager.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel overwhelmed by the pace of change in digital.</td>
<td>44%</td>
<td>41%</td>
<td>49%</td>
<td>46%</td>
<td>43%</td>
</tr>
<tr>
<td>My boss doesn’t want to invest enough in digital marketing.</td>
<td>37%</td>
<td>34%</td>
<td>40%</td>
<td>41%</td>
<td>36%</td>
</tr>
<tr>
<td>People who work for me know more about digital marketing than I do.</td>
<td>34%</td>
<td>32%</td>
<td>38%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>My marketing colleagues don’t really know what they’re doing.</td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Differences that are statistically significant are indicated in **bold**
While almost half of respondents claim to know their digital marketing is working, only 9% strongly agree.

Q17. Please rate each of the following statements based on whether you agree or disagree: Base: TOTAL (1017)

- **I know our marketing is working**: 45% strongly agree, 27% somewhat agree, 14% neither agree nor disagree, 12% somewhat disagree, 9% strongly disagree.
- **I know our digital marketing is working**: 39% strongly agree, 35% somewhat agree, 14% neither agree nor disagree, 9% somewhat disagree, 3% strongly disagree.
- **We won't succeed unless we have a successful digital marketing approach**: 43% strongly agree, 24% somewhat agree, 22% neither agree nor disagree, 8% somewhat disagree, 2% strongly disagree.

While almost half of respondents claim to know their digital marketing is working, only 9% strongly agree.

But marketers recognize its importance.

Confidence in digital is notably lower...
Marketers overwhelmingly place importance on ROI

ALL MARKETERS: HOW IMPORTANT IS IT TO PROVE BUSINESS IMPACT AND/OR ROI?

Q20. How important is it to your management for your marketing function/team to prove business impact and/or return on its financial investment (ROI)? Base: TOTAL (n=1017)
And expect it to be more important in the next year

HOW IMPORTANT WILL IT TO BE TO PROVE IMPACT/ROI IN 12 MONTHS?

Q21. Looking ahead to the next 12 months, do you think it will be more or less important for your marketing function/team to prove business impact and/or return on its financial investment (ROI)?
Marketers, regardless of focus or stature, turn first to their marketing colleagues for digital marketing advice.

<table>
<thead>
<tr>
<th>MARKETERS</th>
<th>MARKETING STAFF</th>
<th>MARKETING DECISION MAKERS</th>
<th>DIGITAL MARKETERS</th>
<th>MARKETING GENERALISTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>TURN TO</td>
<td>TURN TO</td>
<td>TURN TO</td>
<td>TURN TO</td>
<td>TURN TO</td>
</tr>
<tr>
<td>Marketing colleagues</td>
<td>Marketing colleagues</td>
<td>Marketing colleagues</td>
<td>Marketing colleagues</td>
<td>Marketing colleagues</td>
</tr>
<tr>
<td>(same company)</td>
<td>(same company)</td>
<td>(same company)</td>
<td>(same company)</td>
<td>(same company)</td>
</tr>
<tr>
<td>32%</td>
<td>39%</td>
<td>23%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Agencies</td>
<td>Agencies</td>
<td>Agencies</td>
<td>Agencies</td>
<td>Agencies</td>
</tr>
<tr>
<td>18%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Q19. Who do you turn to first for digital marketing advice? TOP 2 BOX Base: TOTAL (n=1017)
MARKETING STAFF (n=499) MKTING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
### Most marketers don’t have formal digital training

**Knowledge overwhelmingly gained on the job**

<table>
<thead>
<tr>
<th>Method</th>
<th>All Marketers</th>
<th>Marketing Staff (n=499)</th>
<th>Marketing Decision Makers (n=436)</th>
<th>Digital Marketers (n=263)</th>
<th>Marketing Generalists (n=754)</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-the-job experience</td>
<td>85%</td>
<td>88%</td>
<td>81%</td>
<td>82%</td>
<td>86%</td>
</tr>
<tr>
<td>Watching what other brands/companies do</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Trade conferences/seminars</td>
<td>25%</td>
<td>22%</td>
<td>29%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Professional industry groups/communities</td>
<td>20%</td>
<td>17%</td>
<td>24%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Online training courses/classes (outside of school)</td>
<td>18%</td>
<td>17%</td>
<td>20%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>In-person training courses/classes (outside of school)</td>
<td>18%</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>In school: Full-time program (i.e., learned digital marketing in college or grad school)</td>
<td>16%</td>
<td>20%</td>
<td>12%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>In school: Part-time program (e.g., night school)</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>I don’t have any specialized digital marketing knowledge</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Differences that are statistically significant are indicated in bold*

Q8. How have you acquired your digital marketing knowledge? Base: TOTAL (n=1017)
In your own words, what is the most important concern or issue for marketers today?

1. Reaching Customers
   - “Reaching consumers in an over-saturated market.”
   - “Reaching the right customer at the right time with the right message.”

2. Keeping Current
   - “The fast pace of changing technology, and finding what works on different platforms.”
   - “Learning new technology while on the job.”
   - “Keeping up with changes in digital/Social Media Marketing and the level of creativity out there.”
   - “Just keeping up.”

   - “Getting ahead of curve - no longer enough just to keep up.”
How do you keep up with the pace of marketing and stay in touch with latest trends and information?

Q25. How do you keep up with the pace of marketing and stay in touch with latest trends and information? (n=1017)
3. KEY DRIVERS ANALYSIS
We asked respondents how they were performing across a number of key areas. Then we asked them to rate the importance of each of those.

Importance

“How important should this be to your company?”

Performance

“How well is your company performing on this?”

Where there’s a gap, there’s a shortcoming.
#1 most important topic is brand building.

#1 biggest gap is marketing measurement.
Large gaps in measurement, but also creativity, CRM

<table>
<thead>
<tr>
<th>Category</th>
<th>Importance</th>
<th>Performance</th>
<th>(GAP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Building</td>
<td>36%</td>
<td>47%</td>
<td>11%</td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>29%</td>
<td>76%</td>
<td>47%</td>
</tr>
<tr>
<td>Content Management</td>
<td>40%</td>
<td>76%</td>
<td>36%</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing programs</td>
<td>39%</td>
<td>75%</td>
<td>36%</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>58%</td>
<td>75%</td>
<td>17%</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>52%</td>
<td>71%</td>
<td>19%</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>40%</td>
<td>71%</td>
<td>31%</td>
</tr>
<tr>
<td>Digital Advertising</td>
<td>31%</td>
<td>69%</td>
<td>38%</td>
</tr>
<tr>
<td>Public Relations</td>
<td>33%</td>
<td>68%</td>
<td>35%</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>33%</td>
<td>68%</td>
<td>36%</td>
</tr>
<tr>
<td>Social Marketing</td>
<td>33%</td>
<td>64%</td>
<td>31%</td>
</tr>
<tr>
<td>Events</td>
<td>26%</td>
<td>52%</td>
<td>26%</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>29%</td>
<td>79%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=1017)
Introduction to Correlation Analysis

Ultimately, we compared

**Stated Marketing Importance**
(what marketers *said* is important)

**Derived Marketing Importance**
(what *actually* correlates with digital marketing performance)

and determined whether marketers’ perceptions of importance matched up with what actually drove their digital marketing effectiveness.
Digital advertising— not brand building – is a key driver of digital marketing effectiveness

**DERIVED IMPORTANCE: HOW IMPORTANT IS EACH CATEGORY TO OVERALL DIGITAL MARKETING EFFECTIVENESS?**

<table>
<thead>
<tr>
<th>ALL MARKETERS</th>
<th>DIGITAL MARKETERS</th>
<th>Vs.</th>
<th>MARKETING GENERALISTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Digital Advertising</td>
<td>1 Digital Advertising</td>
<td>1 Digital Advertising</td>
<td>2 Content Management</td>
</tr>
<tr>
<td>2. Content Management</td>
<td>2 Cross-channel marketing</td>
<td>2 Content Management</td>
<td>3 Social Media Marketing</td>
</tr>
<tr>
<td>3. Cross-channel marketing</td>
<td>3 Content Management</td>
<td>3 Social Media Marketing</td>
<td>4 Creativity &amp; Innovation in marketing programs</td>
</tr>
<tr>
<td>4. Media Mix Planning</td>
<td>4 E-Commerce</td>
<td>4 Creativity &amp; Innovation in marketing programs</td>
<td>5 Media Mix Planning</td>
</tr>
<tr>
<td>5. Marketing Measurement</td>
<td>5 Media Mix Planning</td>
<td>5 Media Mix Planning</td>
<td>5 Marketing Measurement</td>
</tr>
<tr>
<td>6. Social Media Marketing</td>
<td>6 Marketing Measurement</td>
<td>6 Marketing Measurement</td>
<td>6 Cross-channel marketing</td>
</tr>
<tr>
<td>7. Creativity &amp; Innovation in marketing programs</td>
<td>7 Creativity &amp; Innovation in marketing programs</td>
<td>7 Creativity &amp; Innovation in marketing programs</td>
<td>6 Personalization and Targeting</td>
</tr>
<tr>
<td>8. Personalization and Targeting</td>
<td>7 Personalization and Targeting</td>
<td>7 Personalization and Targeting</td>
<td>7 E-Commerce</td>
</tr>
<tr>
<td>9. E-Commerce</td>
<td>8 Social Media Marketing</td>
<td>8 Social Media Marketing</td>
<td>8 Customer Response Management</td>
</tr>
<tr>
<td>11. Public Relations</td>
<td>9 Public Relations</td>
<td>9 Public Relations</td>
<td>10 Public Relations</td>
</tr>
<tr>
<td>12. Brand Building</td>
<td>10 Events</td>
<td>10 Events</td>
<td>11 Events</td>
</tr>
<tr>
<td>13. Events</td>
<td>11 Brand Building</td>
<td>11 Brand Building</td>
<td>12 Events</td>
</tr>
</tbody>
</table>

10. How effective is your company overall in terms of digital marketing? 12. Please tell us how well you feel your company is currently performing on each of the following. Base: TOTAL (n=804-934)
Each number indicates actual correlation – the closer to 1, the more it is correlated with success.

<table>
<thead>
<tr>
<th>Category</th>
<th>ALL MARKETERS</th>
<th>MARKETING STAFF n=399-472</th>
<th>MARKETING DECISION MAKERS n=359-419</th>
<th>DIGITAL MARKETERS n=208-246</th>
<th>MARKETING GENERALISTS n=596-714</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Advertising</td>
<td>0.68</td>
<td>0.72</td>
<td>0.65</td>
<td>0.64</td>
<td>0.69</td>
</tr>
<tr>
<td>Content Management</td>
<td>0.58</td>
<td>0.60</td>
<td>0.58</td>
<td>0.52</td>
<td>0.61</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>0.57</td>
<td>0.57</td>
<td>0.58</td>
<td>0.58</td>
<td>0.57</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>0.56</td>
<td>0.56</td>
<td>0.54</td>
<td>0.50</td>
<td>0.58</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing</td>
<td>0.56</td>
<td>0.54</td>
<td>0.57</td>
<td>0.48</td>
<td>0.59</td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>0.56</td>
<td>0.59</td>
<td>0.55</td>
<td>0.49</td>
<td>0.58</td>
</tr>
<tr>
<td>Social Media Marketing</td>
<td>0.55</td>
<td>0.56</td>
<td>0.57</td>
<td>0.41</td>
<td>0.60</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>0.55</td>
<td>0.52</td>
<td>0.57</td>
<td>0.51</td>
<td>0.56</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>0.54</td>
<td>0.54</td>
<td>0.54</td>
<td>0.48</td>
<td>0.57</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>0.49</td>
<td>0.51</td>
<td>0.47</td>
<td>0.39</td>
<td>0.54</td>
</tr>
<tr>
<td>Public Relations</td>
<td>0.45</td>
<td>0.46</td>
<td>0.41</td>
<td>0.39</td>
<td>0.48</td>
</tr>
<tr>
<td>Brand Building</td>
<td>0.44</td>
<td>0.46</td>
<td>0.38</td>
<td>0.27</td>
<td>0.5</td>
</tr>
<tr>
<td>Events</td>
<td>0.29</td>
<td>0.25</td>
<td>0.33</td>
<td>0.29</td>
<td>0.30</td>
</tr>
</tbody>
</table>

Values are correlations.

Differences that are statistically significant are indicated in bold.

N varies due to some respondents indicating DK or NA.

10. How effective is your company overall in terms of digital marketing?
12. Please tell us how well you feel your company is currently performing on each of the following. Base: TOTAL (n=804-934)
Content management maintains strong importance across both stated and derived.

**Stated Importance**
1. Brand Building
2. Marketing Measurement
3. Content Management
4. Creativity and Innovation in marketing programs
5. Customer Response Management
6. Personalization and Targeting
7. Cross-channel marketing
8. Digital Advertising
9. Public Relations
10. Media Mix Planning
11. Social Media Marketing
12. Events
13. E-Commerce

**Derived Importance**
1. Digital Advertising
2. Content Management
3. Cross-channel marketing
4. Media Mix Planning
5. Creativity & Innovation in marketing programs
6. Marketing Measurement
7. Social Media Marketing
8. E-Commerce
9. Personalization and Targeting
10. Customer Response Management
11. Events
12. E-Commerce

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10. How effective is your company overall in terms of digital marketing? 12. Please tell us how well you feel your company is currently performing on each of the following. Base: TOTAL (n=804-1017)
Cross-channel marketing is a stronger driver of success among digital marketers.

**STATED IMPORTANCE**
1. Content Management
2. Creativity and Innovation in marketing programs
3. Brand Building
4. Marketing Measurement
5. Digital Advertising
6. Customer Response Management
7. Cross-channel marketing
8. Personalization and Targeting
9. Social Media Marketing
10. Public Relations
11. Media Mix Planning
12. E-Commerce
13. Events

**DERIVED IMPORTANCE**
1. Digital Advertising
2. Cross-channel marketing
3. Content Management
4. E-Commerce
5. Media Mix Planning
6. Marketing Measurement
7. Creativity & Innovation in marketing programs
8. Personalization and Targeting
9. Social Media Marketing
10. Events
11. Brand Building
Marketing Generalists are more likely to rate everything as important and have less differentiated derived importance.

### Stated Importance

1. Brand Building
2. Marketing Measurement
3. Customer Response Management
4. Content Management
5. Creativity and Innovation in marketing programs
6. Personalization and Targeting
7. Cross-channel marketing
8. Public Relations
9. Media Mix Planning
10. Digital Advertising
11. Social Media Marketing
12. Events
13. E-Commerce

### Derived Importance

1. Digital Advertising
2. Content Management
3. Social Media Marketing
4. Creativity & Innovation in marketing programs
5. Media Mix Planning
6. Cross-channel marketing
7. Personalization and Targeting
8. E-Commerce
9. Brand Building
10. Customer Response Management
11. Public Relations
12. Events

---

10. How effective is your company overall in terms of digital marketing? 12. Please tell us how well you feel your company is currently performing on each of the following: Base: TOTAL (n=804-1017)
4. THE ROADMAP TO SUCCESS
We also wanted to see what high performing companies are doing and how they differ from companies that performed at or below average.

We asked respondents:
Q. “In the last twelve months, would you categorize your company as delivering...
(Please select one only)

a. Superior business performance (i.e. your company has out-performed key competitors in terms of sales or revenue)

b. Average business performance (i.e. your company performed similarly to key competitors)

c. Below average business performance (i.e. your company has recorded lower sales or revenue than key competitors)

We call these “High Performers”

We call these “Lower Performers”

Base: Superior business performance (n=371); Average OR below business performance (n=646)
Marketers from high performing companies have a higher opinion of their marketing effectiveness and feel more prepared for digital marketing.

**Q17. Please rate each of the following statements based on whether you agree or disagree: TOP 2 BOX**

- Superior business performance (n=371)
- Average OR below business performance (n=646)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Lower Performers</th>
<th>High Performers</th>
</tr>
</thead>
<tbody>
<tr>
<td>My marketing colleagues don't really know what they're doing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>People who work for me know more about digital marketing than I do.</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>My boss doesn't want to invest enough in digital marketing.</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>I feel overwhelmed by the pace of change in digital.</td>
<td>31%</td>
<td>41%</td>
</tr>
<tr>
<td>I know more about digital marketing than my manager.</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>We are under pressure to move to digital faster.</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td>I have the digital skills and tools necessary to do my job effectively.</td>
<td>52%</td>
<td>69%</td>
</tr>
<tr>
<td>I know our marketing is working.</td>
<td>50%</td>
<td>76%</td>
</tr>
<tr>
<td>My boss doesn't want to invest enough in digital marketing.</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>We won't succeed unless we have a successful digital marketing approach.</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>There is more pressure to show return on investment on marketing spend.</td>
<td>64%</td>
<td>70%</td>
</tr>
</tbody>
</table>

*DO YOU AGREE WITH THESE STATEMENTS? (% AGREE, TOP 2 BOX)*

- Marketers from high performing companies have a higher opinion of their marketing effectiveness and feel more prepared for digital marketing.
High performing companies are investing more in digital.

Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year.

Base: Superior business performance (n=371); Average OR below business performance (n=646)

- Investing in digital channels/programs: 71% High Performers, 52% Lower Performers
- Hiring staff with digital expertise: 53% High Performers, 40% Lower Performers
- Investing in digital marketing technology: 73% High Performers, 53% Lower Performers

ADobe | DIGITAL DISTRESS: What Keeps Marketers Up at Night?
At high performing companies, **half of marketers** think the company’s digital marketing expertise is proficient. While that is not particularly high...

...It’s still better than **lower performing companies**, where it’s only **one in four**.
High-performers are twice as likely to rate their company as proficient – and more likely to rate themselves and their colleagues as such

<table>
<thead>
<tr>
<th></th>
<th>High Performers</th>
<th>Lower Performers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say that they are proficient in digital marketing</td>
<td>48%</td>
<td>34%</td>
</tr>
<tr>
<td>Say that their marketing colleagues/team are proficient in digital marketing</td>
<td>56%</td>
<td>31%</td>
</tr>
<tr>
<td>Say that their industry peers are proficient in digital marketing</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>Say that their company is proficient in digital marketing</td>
<td>50%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX
Base: Superior business performance (n=371); Average OR below business performance (n=646)
High performing companies have more faith in their company’s marketing – but still less than half think their digital marketing is effective.

<table>
<thead>
<tr>
<th>High Performers</th>
<th>Lower Performers</th>
<th>Overall Marketing</th>
<th>Digital Marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say their company is effective in overall marketing</td>
<td>Say their company is effective in digital marketing</td>
<td>Say “I know which of my marketing channels are most effective”</td>
<td>Are satisfied with current marketing mix</td>
</tr>
<tr>
<td>62%</td>
<td>49%</td>
<td>70%</td>
<td>86%</td>
</tr>
<tr>
<td>28%</td>
<td>22%</td>
<td>52%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Q4. On a 0 to 10 scale where 0 is NOT AT ALL EFFECTIVE and 10 is EXTREMELY EFFECTIVE how effective is your company overall in terms of marketing?

Q10. Please indicate whether you agree or disagree with the following statements TOP 2 BOX
Base: Superior business performance (n=371); Average OR below business performance (n=646)
5. WHAT’S ON MARKETERS’ MINDS?
Unsurprisingly, the number one concern for marketers is reaching customers. *(It is, after all, their job.)*

However, their next three concerns are interesting, and they all deal with two broad topics:

**Measurement & ROI.**
Marketers want to know if they’re on the right track

### ALL MARKETERS: ARE YOU CONCERNED ABOUT...

<table>
<thead>
<tr>
<th>Issue</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reaching customers</td>
<td>82%</td>
<td>81%</td>
<td>76%</td>
<td>84%</td>
</tr>
<tr>
<td>Understanding whether campaigns are working</td>
<td>79%</td>
<td>77%</td>
<td>80%</td>
<td>81%</td>
</tr>
<tr>
<td>Proving campaign effectiveness</td>
<td>77%</td>
<td>82%</td>
<td>72%</td>
<td>78%</td>
</tr>
<tr>
<td>Demonstrating marketing return on investment</td>
<td>75%</td>
<td>78%</td>
<td>72%</td>
<td>71%</td>
</tr>
<tr>
<td>Using digital tools effectively</td>
<td>70%</td>
<td>73%</td>
<td>66%</td>
<td>71%</td>
</tr>
<tr>
<td>Keeping up with all the changes in marketing</td>
<td>65%</td>
<td>66%</td>
<td>63%</td>
<td>67%</td>
</tr>
<tr>
<td>Keeping up with digitally-savvy competitors</td>
<td>59%</td>
<td>61%</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>Shrinking budgets</td>
<td>54%</td>
<td>55%</td>
<td>51%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Differences that are statistically significant are indicated in **bold**

Q2. As a marketer, how concerned are you about the following issues? Top 2 Box (Extremely concerned/Very concerned/Extremely concerned) Base: TOTAL (n=1017)
Digital marketers more concerned about ROI

<table>
<thead>
<tr>
<th>ALL MARKETERS: WHAT ARE YOU MOST CONCERNED ABOUT?</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reaching customers</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2. Understanding whether campaigns are working</td>
<td>2</td>
<td>4</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>3. Demonstrating marketing return on investment</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4. Shrinking budgets</td>
<td>5</td>
<td>2</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>5. Proving campaign effectiveness</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>6. Using digital tools effectively</td>
<td>6</td>
<td>6</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>7. Keeping up with all the changes in marketing</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>8. Keeping up with digitally-savvy competitors</td>
<td>7</td>
<td>8</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

Q3. Of those you just identified, which one do you find the most concerning? Base: TOTAL (n=1017)

When given a list of options, surprisingly few chose “keeping current” as the top concern – but when asked the same question free-form, it was the second most-specified issue.
66% of all marketers state companies won’t succeed unless they have a digital marketing approach.
Demographics

Marketing Decision Makers vs. Staff

**TOP TITLES**

**Senior Manager/Marketing Decision Maker**
16% Director/Department Head
6% Partner/Principle
5% VP/Assistant VP

**Marketing Staff**
28% Manager/Senior Manager
21% Coordinator/Specialist/Associate

SSA. Please indicate your title from the list below: Base: TOTAL (n=1017)
Demographics

59%  
Marketing Generalists

41%  
Digital Marketers

60%  
Studied marketing in school

40%  
Did not study marketing in school

51%  
Decision makers

Software/Products/Services Authority

I am the sole decision maker when it comes to choosing digital marketing solutions for my organization  
13%

I am one of several decision makers  
38%

I am not a decision maker, but I have significant influence on decisions on digital marketing solutions  
25%

I can request solutions, but I do not have significant influence on what is purchased  
16%

I have no influence in the decision-making process  
8%

D9. Did you study marketing in school? Base: TOTAL (n=1017)
53. Please indicate below which option more closely describes your marketing role in your current company: “Marketing that is predominantly digitally focused”"," More traditional marketing but may employ some digital marketing tools (Generalist)” Base: TOTAL (n=1017)
D6. Which ONE of the following best describes your role in DECIDING WHICH digital marketing solutions (e.g., software products and services) you and/or your department will use for work? Base: TOTAL (n=1017)
**Organization Marketing Efforts**

- **38%** Traditional (25% or less digital marketing)
- **51%** Mix (Between 26-75% digital marketing)
- **11%** Mostly (76% + digital marketing)

**Company Size**

- 16% Small (Fewer than 100 employees)
- 24% Medium (100-999 employees)
- 41% Large (1,000-9,999 employees)
- 20% Enterprise (9,999 + employees)

S2. What percent of your company's marketing efforts are spent on online and digital marketing activities? Base: TOTAL (n=1017)

S6. Which of the following ranges would most closely describe the number of full-time employees working across your organization, including all locations? Base: TOTAL (n=1017)
ADDITIONAL INFORMATION
Who do you turn to first for digital marketing advice? TOP 2 BOX Base: TOTAL (n=1017) 
MARKETING STAFF (n=499) MKETING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
More than ½ think digital marketing is trial and error

ALL MARKETERS

Marketing has value and that value can be measured
Marketing has changed more in the last 2 years than in the last 50 approaches are in a constant cycle of trial and error
For most companies, digital marketing approaches are in a constant cycle of trial and error
I know which of my marketing channels are most effective
I feel well armed with the information to be an effective marketer
My company's digital marketing approach is in a constant cycle of trial and error
I know that our digital marketing is working
Our company has the right technology to be effective
Marketers are more likely than other professions to feel unsure about the effectiveness of their work
Consumers have become harder to reach
I feel outgunned by other companies’ marketing
I don’t know if my industry peers are ahead of me in terms of digital marketing

Q10. Please indicate whether you agree or disagree with the following statements: TOP & BOTTOM 2 BOX Base: TOTAL (n=1017)
Marketing mix satisfaction

- **69%** are satisfied with current marketing mix
- **17%** are not satisfied with current marketing mix

Marketers want to boost investments in:

1. TV    2. Print    3. Social

Q7a. How satisfied are you with your current marketing mix? TOP 2 BOX/BOTTOM 2 BOX  Base: TOTAL (n=1017)
Q7b. You indicated you are not satisfied with your current marketing mix. Please select the areas where you wish you could invest more. Base: TOTAL (n=1017)
How easy is it to prove ROI to management?

Q21. Looking ahead to the next 12 months, do you think it will be more or less important for your marketing function/team to prove business impact and/or return on its financial investment (ROI)?

- Extremely Easy
- Somewhat Easy
- Neither Easy Nor Difficult
- Somewhat Difficult
- Extremely Difficult

n=1,017  n=499  n=436  n=263  n=754
Marketing measurement and creativity fall short among staff

Importance vs. Performance: Marketing Staff

- Brand Building: Importance 81%, Performance 48%, GAP 33%
- Content Management: Importance 79%, Performance 36%, GAP 43%
- Customer Response Management: Importance 78%, Performance 34%, GAP 44%
- Creativity and Innovation in marketing programs: Importance 77%, Performance 31%, GAP 47%
- Marketing Measurement: Importance 77%, Performance 30%, GAP 47%
- Cross-channel marketing: Importance 74%, Performance 34%, GAP 40%
- Digital Advertising: Importance 72%, Performance 31%, GAP 41%
- Personalization and Targeting: Importance 72%, Performance 30%, GAP 42%
- Media Mix Planning: Importance 71%, Performance 31%, GAP 40%
- Public Relations: Importance 69%, Performance 35%, GAP 34%
- Social Marketing: Importance 66%, Performance 32%, GAP 34%
- Events: Importance 60%, Performance 36%, GAP 25%
- E-Commerce: Importance 53%, Performance 25%, GAP 28%

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 Box Base: TOTAL (n=499)

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 Box Base: TOTAL (n=499)
Decision Makers see opportunity in customer response management and targeting

Importance vs. Performance: Marketing Decision Makers

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Importance</th>
<th>Performance</th>
<th>(GAP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Building</td>
<td>45%</td>
<td>77%</td>
<td>32%</td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>26%</td>
<td>74%</td>
<td>48%</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing programs</td>
<td>35%</td>
<td>72%</td>
<td>37%</td>
</tr>
<tr>
<td>Content Management</td>
<td>34%</td>
<td>72%</td>
<td>37%</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>31%</td>
<td>69%</td>
<td>38%</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>29%</td>
<td>67%</td>
<td>38%</td>
</tr>
<tr>
<td>Public Relations</td>
<td>35%</td>
<td>67%</td>
<td>32%</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>31%</td>
<td>65%</td>
<td>34%</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>34%</td>
<td>64%</td>
<td>31%</td>
</tr>
<tr>
<td>Digital Advertising</td>
<td>27%</td>
<td>62%</td>
<td>35%</td>
</tr>
<tr>
<td>Social Marketing</td>
<td>28%</td>
<td>61%</td>
<td>33%</td>
</tr>
<tr>
<td>Events</td>
<td>40%</td>
<td>55%</td>
<td>14%</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>26%</td>
<td>49%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=436)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=436)
Digital Marketers see opportunity in customer response management and targeting

Importance vs. Performance: Digital Marketers

<table>
<thead>
<tr>
<th>Service</th>
<th>Importance</th>
<th>Performance</th>
<th>(GAP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Management</td>
<td>37%</td>
<td>76%</td>
<td>40%</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing programs</td>
<td>35%</td>
<td>75%</td>
<td>40%</td>
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<tr>
<td>Brand Building</td>
<td>41%</td>
<td>74%</td>
<td>32%</td>
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<tr>
<td>Marketing Measurement</td>
<td>31%</td>
<td>74%</td>
<td>43%</td>
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<tr>
<td>Digital Advertising</td>
<td>36%</td>
<td>72%</td>
<td>36%</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>28%</td>
<td>72%</td>
<td>43%</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>33%</td>
<td>72%</td>
<td>39%</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>28%</td>
<td>71%</td>
<td>43%</td>
</tr>
<tr>
<td>Social Marketing</td>
<td>32%</td>
<td>68%</td>
<td>36%</td>
</tr>
<tr>
<td>Public Relations</td>
<td>34%</td>
<td>66%</td>
<td>32%</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>33%</td>
<td>65%</td>
<td>33%</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>32%</td>
<td>57%</td>
<td>25%</td>
</tr>
<tr>
<td>Events</td>
<td>35%</td>
<td>54%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=263)
Generalists see opportunity in creativity and customer response management

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=754)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=754)
Social media on the rise
WHAT DO YOU THINK WILL BE THE MOST IMPORTANT TO MARKETERS IN THE NEXT 3 YEARS?

**SUPERIOR PERFORMANCE**

- Social Marketing: 14%
- Personalization and Targeting: 13%
- Creativity and Innovation in marketing programs: 12%
- Digital Advertising: 11%
- Cross-channel marketing: 8%
- E-Commerce: 9%
- Media Mix Planning: 7%
- Marketing Measurement: 6%
- Customer Response Management: 7%
- Content Marketing: 6%
- Brand Building: 4%
- Events: 2%
- Public Relations: 2%

**AVG/BELOW AVG PERFORMANCE**

- Social Marketing: 13%
- Personalization and Targeting: 12%
- Creativity and Innovation in marketing programs: 11%
- Digital Advertising: 11%
- Cross-channel marketing: 11%
- E-Commerce: 8%
- Media Mix Planning: 9%
- Marketing Measurement: 8%
- Customer Response Management: 6%
- Content Marketing: 5%
- Brand Building: 5%
- Events: 2%
- Public Relations: 2%

Q16. Which one area do you think will be the most important to marketers in the next 3 years? (Select ONE only) Base: TOTAL (n=1017)
Greater gap between importance and performance among lower performing companies

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX; Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX

Superior business performance (n=371); Average OR below business performance (n=646)

(GAP)

Superior Performance

Brand Building 62% 84% 22%
Marketing Measurement 45% 83% 38%
Content Management 52% 79% 27%
Creativity and Innovation in marketing programs 47% 81% 34%
Customer Response Management 48% 81% 33%
Personalization and Targeting 46% 76% 30%
Cross-channel marketing 50% 76% 26%
Digital Advertising 46% 75% 29%
Public Relations 49% 76% 27%
Media Mix Planning 47% 77% 30%
Social Marketing 43% 72% 29%
Events 36% 65% 14%
E-Commerce 51% 56% 20%

Average/Below Average Performance

Brand Building 39% 77% 38%
Marketing Measurement 21% 73% 52%
Content Management 27% 74% 47%
Creativity and Innovation in marketing programs 26% 72% 46%
Customer Response Management 25% 71% 46%
Personalization and Targeting 22% 68% 46%
Cross-channel marketing 24% 68% 44%
Digital Advertising 22% 65% 43%
Public Relations 28% 64% 36%
Media Mix Planning 24% 63% 37%
Social Marketing 24% 60% 36%
Events 32% 55% 23%
E-Commerce 19% 49% 30%