

The **CMO** Survey[®] 

AUGUST 2019

Topline Report

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

Deloitte.

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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 August 2019 survey is the 23rd 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 August 2019 CMO Survey

Survey sample

The sample of 2575 top marketers at U.S. for-profit companies: 341 responded for a 13.2% response rate; 95% of respondents are VP-level or above.

Survey administration

The survey was in field from July 10-August 2, 2019. It was administered via email with 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

Table of Contents

Topic 1: Marketplace Dynamics

Overall Economy

- 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.

Customers

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

Partners

- 4 Does your firm use channel partners or go directly to market?

Topic 2: Firm Growth Strategies

- 5 Allocate 100 points to reflect your firm's spending on growth strategies during the prior 12 months.
- 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?

Topic 3: Marketing Spending

- 9 What percentage of your firm's overall budget does marketing currently account for?
- 10 Marketing expenses account for what percent of your firm's revenues?
- 11 By what percent has your overall marketing spending changed in the prior 12 months?
- 12 What is your company's percentage change in marketing spending during the next 12 months?
- 13 What is your company's percentage change in spending during the next 12 months in each specific marketing area?
- 14 By what percent has your spending on each type of marketing knowledge changed in the prior 12 months?
- 15 What percent of your marketing budget is currently devoted to training and development?
- 16 How is your paid digital media allocated across the following channels?

Topic 4: Firm Performance

- 17 Rate your firm's financial and market performance during the prior 12 months.
- 18 Rate your firm's performance on societal metrics during the prior 12 months.
- 19 What are your company's top three challenges in effectively managing customer experience?
- 20 Rate how well you think your company performs each aspect of customer experience relative to your competitors.

Topic 5: Social Media Marketing

- 21 What percent of your marketing budget do you spend on social media?
- 22 What percent of social media activities are performed by outside agencies?
- 23 To what degree has the use of social media contributed to your company's performance?
- 24 How effectively is social media linked to your firm's marketing strategy?
- 25 How effectively does your company integrate customer information across purchasing, communication and social media channels?
- 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](#) In your company, how important is employee satisfaction to customer satisfaction?
- [31](#) How well do your company employees trust your company's brand?
- [32](#) By what percentage will your firm's outsourcing of marketing activities change in the next year?
- [33](#) How many employees/marketing employees are in your company?
- [34](#) To what extent are new technologies replacing marketing employees in your company?

Topic 8: Marketing Organization

- [35](#) Rate the quality of your company's marketing knowledge resources
- [36](#) How does your company approach the development of new marketing capabilities?
- [37](#) Select the description that best captures the role of sales within your firm.
- [38](#) How would you rate the level of cooperation between marketing and sales in your company?

Topic 9: Marketing Leadership

- [39](#) What is marketing primarily responsible for in your firm?
- [40](#) Do you believe it is appropriate for your brand to take a stance on politically-charged issues?
- [41](#) To what extent have new technologies strengthened or weakened the importance of marketing in your company?
- [42](#) How much time do you spend managing the present versus preparing for the future of marketing in your company?

Topic 10: Marketing Analytics

- [43](#) What percent of your marketing budget do you spend on marketing analytics?
- [44](#) In what percent of projects does your company use marketing analytics before a decision is made?
- [45](#) To what degree has the use of marketing analytics contributed to your company's performance?
- [46](#) Which best describes how your company shows the long-term impact of marketing spend on your business?
- [47](#) To what extent is your company implementing artificial intelligence or machine learning into its marketing toolkit?
- [48](#) To what extent are blockchain technologies affecting your company's marketing strategies?

Appendix: Firm-level Descriptive Information

- [49](#) Which is your firm's primary economic sector?
- [50](#) What is your firm's primary industry sector?
- [51](#) 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	42	24.0 %	± 3.5 %
2=No Change	53	30.3 %	± 3.9 %
1=Less	80	45.7 %	± 4.5 %
Total	175	100.0 %	

Mean = 1.78

SD = 0.81

Missing Cases = 166

Response Percent = 51.3 %

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 = 19.80

Maximum = 99.47

Mean = 59.80

Median = 65

Standard Deviation (Unbiased Estimate) = 19.92

95 Percent Confidence Interval around the mean = 56.81 - 62.80

Valid Cases = 170

Missing Cases = 171

Response Percent = 49.9%

Topic 1: Marketplace Dynamics - Customers and Partners

For this market, 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	2.09 0.88	30 17.6%	20 11.8%	38 22.4%	88 51.8%
Superior product quality	1.90 0.80	42 24.7%	41 24.1%	31 18.2%	114 67.1%
Superior innovation	2.11 0.86	20 11.8%	17 10.0%	27 15.9%	64 37.6%
Excellent service	1.90 0.79	45 26.5%	47 27.6%	33 19.4%	125 73.5%
Trusting relationship	2.07 0.79	33 19.4%	45 26.5%	41 24.1%	119 70.0%

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

	Number	Percent	95% CI
Uses channel partners	242	71.0 %	± 4.8 %
Does not use channel partners	99	29.0 %	± 4.8 %
Total	341	100.0 %	

Missing Cases = 0

Response Percent = 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	54.3	26.0	50.4 - 58.3	52.5	0	100	165
New products/services in existing markets	21.6	18.7	18.7 - 24.4	20	0	100	165
Existing products/services in new markets	14.8	14.6	12.6 - 17.0	10	0	75	165
New products/services in new markets	9.3	14.5	7.1 - 11.5	5	0	100	165

Topic 2: Firm Growth Strategies

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

Minimum = 42.97

Maximum = 100

Mean = 87.59

Median = 99

Standard Deviation (Unbiased Estimate) = 18.39

95 Percent Confidence Interval around the mean = 84.82 - 90.35

Valid Cases = 170

Missing Cases = 171

Response Percent = 49.9%

Topic 2: Firm Growth Strategies

What percentage of your firm's sales is domestic?

Minimum = 40.88

Maximum = 100

Mean = 85.78

Median = 95

Standard Deviation (Unbiased Estimate) = 19.34

95 Percent Confidence Interval around the mean = 82.87 - 88.69

Valid Cases = 170

Missing Cases = 171

Response Percent = 49.9%

Topic 2: Firm Growth Strategies

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

Minimum = 0

Maximum = 69.68

Mean = 13.36

Median = 2

Standard Deviation (Unbiased Estimate) = 21.99

95 Percent Confidence Interval around the mean = 10.97 - 15.76

Valid Cases = 325

Missing Cases = 16

Response Percent = 95.3%

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 42.50

Mean = 12.01

Median = 8

Standard Deviation (Unbiased Estimate) = 11.95

95 Percent Confidence Interval around the mean = 10.21 - 13.81

Valid Cases = 169

Missing Cases = 172

Response Percent = 49.6%

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 49.00

Mean = 9.83

Median = 5

Standard Deviation (Unbiased Estimate) = 13.10

95 Percent Confidence Interval around the mean = 7.85 - 11.80

Valid Cases = 169

Missing Cases = 172

Response Percent = 49.6%

Topic 3: Marketing Spending

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

Minimum = -37.12

Maximum = 52.36

Mean = 6.29

Median = 2

Standard Deviation (Unbiased Estimate) = 15.84

95 Percent Confidence Interval around the mean = 3.95 - 8.62

Valid Cases = 177

Missing Cases = 164

Response Percent = 51.9%

Topic 3: Marketing Spending

Relative to the prior 12 months, what is your company's percentage change in marketing spending expected to be during the *next* 12 months?

Minimum = -32.22

Maximum = 52.75

Mean = 8.67

Median = 5

Standard Deviation (Unbiased Estimate) = 15.34

95 Percent Confidence Interval around the mean = 6.42 - 10.93

Valid Cases = 178

Missing Cases = 163

Response Percent = 52.2%

Topic 3: Marketing Spending

Relative to the prior 12 months, what is your company's percentage change in spending expected to be during the next 12 months in each specific marketing area?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	11.83	15.22	9.56 - 14.09	10	-30.70	56.18	173
Customer relationship management	8.93	11.82	7.16 - 10.70	5	-5	45.93	171
Brand building	7.87	10.87	6.25 - 9.49	5	-10	38.95	173
New product introductions	6.58	10.84	4.95 - 8.21	2	-24.43	39.73	170
New service introductions	6.14	8.90	4.81 - 7.48	5	-15	34.20	171
Traditional advertising spending	-0.02	11.81	-1.78 - 1.75	0	-34.14	35.53	172

Topic 3: Marketing Spending

By what percent has your spending on each type of marketing knowledge changed in the *prior 12 months*?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Developing new marketing knowledge and capabilities	10.44	11.51	8.68 - 12.20	10	-10	41.55	164
Marketing research and intelligence	9.18	12.33	7.27 - 11.10	5	-20	42.84	159
Marketing consulting services	7.64	13.49	5.55 - 9.73	0	-26.03	43.57	160
Marketing training	4.23	7.92	3.01 - 5.44	0	-20	31.09	163

Topic 3: Marketing Spending

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

Minimum = 0

Maximum = 26.08

Mean = 5.79

Median = 5

Standard Deviation (Unbiased Estimate) = 5.76

95 Percent Confidence Interval around the mean = 4.91 - 6.67

Valid Cases = 164

Missing Cases = 177

Response Percent = 48.1%

Topic 3: Marketing Spending

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

Channel	Mean	SD	95%CI	Median	Minimum	Maximum	Total
Paid (other)	40.1	35.5	33.5-46.7	30	0	100	112
Print	15.9	22.8	11.7 - 20.2	5	0	100	112
Paid Search (all engines)	13.6	17.3	10.4 - 16.8	10	0	90	112
Paid Social	9.8	13.2	7.4 - 12.3	5	0	80	112
Paid Display (including programmatic)	8.4	12.1	6.2 - 10.7	5	0	70	112
Television	6.2	15.0	3.4 - 8.9	0	0	83	112
Paid Video (including programmatic, full episode players)	4.3	6.2	3.1 - 5.4	0	0	20	112
Radio	1.2	3.0	0.6 - 1.7	0	0	20	112

Topic 4: Firm Performance

Rate your firm's financial and market performance during the *prior* 12 months:

	Mean & SD	-10%	-7%	-5%	-3%	-1%	0	+1%	+3%	+5%	+7%	+10%	Total
Sales revenue	4.72 4.89	3 1.8%	2 1.2%	5 3.0%	5 3.0%	4 2.4%	12 7.3%	11 6.7%	28 17.1%	25 15.2%	16 9.8%	53 32.3%	164 100.0%
Brand value	4.06 4.32	0 0.0%	1 0.6%	4 2.5%	1 0.6%	4 2.5%	33 20.5%	21 13.0%	23 14.3%	26 16.1%	44 2.5%	4 27.3%	161 100.0%
Profits	3.85 4.88	3 1.9%	0 0.0%	5 3.1%	10 6.2%	5 3.1%	19 11.8%	21 13.0%	21 13.0%	21 13.0%	13 8.1%	43 26.7%	161 100.0%
Customer acquisition	3.81 4.39	1 0.6%	0 0.0%	3 1.9%	8 5.0%	8 5.0%	24 15.0%	12 7.5%	38 23.8%	21 13.1%	5 3.1%	40 25.0%	160 100.0%
Marketing ROI	3.79 4.16	1 0.6%	0 0.0%	3 1.9%	1 0.6%	2 1.3%	40 25.2%	18 11.3%	24 15.1%	28 17.6%	6 3.8%	36 22.6%	159 100.0%
Market share	2.97 4.24	3 1.8%	1 0.6%	4 2.5%	4 2.5%	6 3.7%	24 14.7%	31 19.0%	31 19.0%	28 17.2%	5 3.1%	26 16.0%	163 100.0%
Customer retention	2.10 4.12	1 0.6%	1 0.6%	7 4.3%	7 4.3%	13 8.1%	52 32.3%	12 7.5%	18 11.2%	26 16.1%	4 2.5%	20 12.4%	161 100.0%

Topic 4: Firm Performance

Rate your company on each societal metric during the *prior 12 months*:

	Mean & SD	Excellent 5	Good 4	Average 3	Fair 2	Poor 1	Total
Marketing that is beneficial for society	3.40 1.13	34 19.3%	47 26.7%	61 34.7%	23 13.1%	11 6.3%	176 100.0%
Minimizing the impact of marketing on the ecological environment	3.10 1.10	20 11.4%	39 22.2%	72 40.9%	28 15.9%	17 9.7%	176 100.0%

Topic 4: Firm Performance

Rank your top three challenges in effectively managing customer experience in your company (1=top challenge)

Challenge	1	2	3	Mean (SD)	Total
Mapping all elements of the customer journey	25 (10.8%)	12 (5.2%)	8 (3.4%)	1.62 (0.78)	45 (19.4%)
Managing partners that influence any aspects of the customer experience	21 (9.1%)	15 (6.5%)	13 (5.6%)	1.84 (0.83)	49 (21.1%)
Linking customer experience measures to relevant KPI's and financial outcomes	21 (9.1%)	19 (8.2%)	16 (6.9%)	1.91 (0.82)	56 (24.1%)
Determining the contribution of each touchpoint to the overall customer experience and identifying critical touchpoints	28 (12.1%)	22 (9.5%)	25 (10.8%)	1.96 (0.85)	75 (32.3%)
Developing the necessary capabilities inside the organization to design, deliver and monitor the customer experience	31 (13.4%)	26 (11.2%)	28 (12.1%)	1.96 (0.84)	85 (36.6%)
Ensuring a deep understanding of the customer experience across the entire organization	19 (8.2%)	14 (6%)	19 (8.2%)	2 (0.86)	52 (22.4%)
Integrating touchpoints seamlessly across the entire customer journey	26 (11.2%)	21 (9.1%)	27 (11.6%)	2.01 (0.85)	74 (31.9%)
Tailoring the customer experience to the customer's context (location, social, situation, time, needs)	9 (3.9%)	25 (10.8%)	12 (5.2%)	2.07 (0.68)	46 (19.8%)
Coordinating disparate aspects of the organization to design, manage, deliver and monitor the customer experience (marketing, sales, IT, operations, HR, customer service)	24 (10.3%)	29 (12.5%)	31 (13.4%)	2.08 (0.81)	84 (36.2%)
Assuring that customer experiences are compatible with our brand	10 (4.3%)	10 (4.3%)	14 (6%)	2.12 (0.84)	34 (14.7%)
Creating optimal experiences across all channels and devices	13 (5.6%)	18 (7.8%)	21 (9.1%)	2.15 (0.8)	52 (22.4%)
Measuring the customer's perceptions, emotions and behaviors throughout the customer journey	5 (2.2%)	19 (8.2%)	15 (6.5%)	2.26 (0.68)	39 (16.8%)

Topic 4: Firm Performance

Rate how well you think your company performs each aspect of customer experience relative to your competitors:

	Mean (SD)	Below competitors (-1)	On par with competitors (0)	Above competitors (+1)	Total
Assuring that customer experiences are compatible with our brand	0.31 (0.70)	33 (13.6%)	102 (42.0%)	108 (44.4%)	243 (100%)
Mapping all elements of the customer journey	0.09 (0.71)	51 (21.1%)	118 (48.8%)	73 (30.2%)	242 (100%)
Managing partners that influence any aspects of the customer experience	0.04 (0.68)	51 (21.2%)	129 (53.5%)	61 (25.3%)	241 (100%)
Determining the contribution of each touchpoint to the overall customer experience and identifying critical touchpoints	-0.05 (0.67)	60 (24.7%)	134 (55.1%)	49 (20.2%)	243 (100%)
Creating optimal experiences across all channels and devices	-0.08 (0.68)	64 (27.1%)	127 (53.8%)	45 (19.1%)	236 (100%)
Ensuring a deep understanding of the customer experience across the entire organization	-0.12 (0.73)	80 (33.8%)	106 (44.7%)	51 (21.5%)	237 (100%)
Tailoring the customer experience to the customer's context (location, social, situation, time, needs)	-0.12 (0.7)	76 (31.5%)	119 (49.4%)	46 (19.1%)	241 (100%)
Developing the necessary capabilities inside the organization to design, deliver and monitor the customer experience	-0.14 (0.68)	74 (30.8%)	125 (52.1%)	41 (17.1%)	240 (100%)
Linking customer experience measures to relevant KPI's and financial outcomes	-0.15 (0.74)	86 (35.5%)	106 (43.8%)	50 (20.7%)	242 (100%)
Integrating touchpoints seamlessly across the entire customer journey	-0.17 (0.7)	82 (33.9%)	118 (48.8%)	42 (17.4%)	242 (100%)
Coordinating disparate aspects of the organization to design, manage, deliver and monitor the customer experience (marketing, sales, IT, operations, HR, customer service)	-0.18 (0.74)	90 (37.7%)	102 (42.7%)	47 (19.7%)	239 (100%)
Measuring the customer's perceptions, emotions and behaviors throughout the customer journey	-0.22 (0.68)	87 (36.4%)	117 (49%)	35 (14.6%)	239 (100%)

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?	11.91	12.31	10.25 - 13.57	8	212
...will you spend in the next 12 months?	15.33	13.95	13.44 - 17.22	10	209
...do you predict you will spend in five years?	22.53	18.11	20.07 - 24.99	20	208

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

Minimum = 0

Maximum = 87.93

Mean = 23.46

Median = 5

Standard Deviation (Unbiased Estimate) = 31.21

95 Percent Confidence Interval around the mean = 19.24 - 27.68

Valid Cases = 210

Missing Cases = 131

Response Percent = 61.6%

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	35	15.6 %	± 3.2 %
2	57	25.3 %	± 4.0 %
3	36	16.0 %	± 3.3 %
4	38	16.9 %	± 3.4 %
5	33	14.7 %	± 3.2 %
6	15	6.7 %	± 2.2 %
7=Very Highly	11	4.9 %	± 1.9 %
Total	225	100.0 %	

Mean = 3.29

SD = 1.71

Missing Cases = 116

Response Percent = 66.0 %

Topic 5: Social Media

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

	Number	Percent	Cumulative
1=Not At All Effectively	15	6.6 %	6.6 %
2	26	11.5 %	18.1 %
3	32	14.2 %	32.3 %
4	25	11.1 %	43.4 %
5	79	35.0 %	78.3 %
6	23	10.2 %	88.5 %
7=Very Effectively	26	11.5 %	100.0 %
Total	226	100.0 %	100.0 %

Mean = 4.33

SD = 1.70

Missing Cases = 115

Response Percent = 66.3 %

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	27	12.2 %	± 2.9 %
2	46	20.7 %	± 3.7 %
3	46	20.7 %	± 3.7 %
4	49	22.1 %	± 3.8 %
5	33	14.9 %	± 3.2 %
6	10	4.5 %	± 1.8 %
7=Very Effectively	11	5.0 %	± 1.9 %
Total	222	100.0 %	

Mean = 3.40

SD = 1.60

Missing Cases = 119

Response Percent = 65.1 %

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	54	24.1 %	± 3.9 %
We have a good qualitative sense of the impact, but not a quantitative impact	100	44.6 %	± 4.9 %
We haven't been able to show the impact yet	70	31.3 %	± 4.3 %
Total	224	100.0 %	

Missing Cases = 117

Response Percent = 65.7 %

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?	12.75	18.81	10.16 - 15.33	5	0	158.02	204
What percent will you spend on mobile activities in five years?	21.77	18.92	19.16 - 24.38	20	0	62.68	202

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	56	26.0 %	± 4.0 %
2	44	20.5 %	± 3.6 %
3	22	10.2 %	± 2.6 %
4	39	18.1 %	± 3.4 %
5	37	17.2 %	± 3.3 %
6	11	5.1 %	± 1.9 %
7=Very Highly	6	2.8 %	± 1.4 %
Total	215	100.0 %	

Mean = 3.07

SD = 1.74

Missing Cases = 126

Response Percent = 63.0 %

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 = -28.85

Maximum = 44.35

Mean = 6.18

Median = 0

Standard Deviation (Unbiased Estimate) = 12.31

95 Percent Confidence Interval around the mean = 4.30 - 8.06

Valid Cases = 165

Missing Cases = 176

Response Percent = 48.4%

Topic 7: Marketing Jobs

In your company, how important is employee satisfaction to customer satisfaction?

	Number	Percent	95% CI
1=Not Important	4	2.30%	± 1.2 %
2	2	1.10%	± 0.8 %
3	7	4.00%	± 1.5 %
4	21	12.10%	± 2.6 %
5	41	23.60%	± 3.5 %
6	37	21.30%	± 3.3 %
7=Very Important	62	35.60%	± 4.1 %
Total	174	100.0 %	

Mean = 5.60

SD = 1.43

Missing Cases = 167

Response Percent = 51.0 %

Topic 7: Marketing Jobs

How well do your company employees trust your company's brand?

	Number	Percent	95% CI
1=Very Little	0	0.0 %	± 0.0 %
2	3	1.7 %	± 1.0 %
3	5	2.9 %	± 1.3 %
4	11	6.3 %	± 1.9 %
5	37	21.3 %	± 3.3 %
6	58	33.3 %	± 4.0 %
7=A Great Deal	60	34.5 %	± 4.1 %
Total	174	100.0 %	

Mean = 5.85

SD = 1.15

Missing Cases = 167

Response Percent = 51.0 %

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

Minimum = -21.45

Maximum = 32.81

Mean = 4.89

Median = 0

Standard Deviation (Unbiased Estimate) = 10.33

95 Percent Confidence Interval around the mean = 3.31 - 6.47

Valid Cases = 164

Missing Cases = 177

Response Percent = 48.1%

Topic 7: Marketing Jobs

How many employees/marketing employees are in your company?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Number of employees	13578	33651	8443 - 18712	675	1	143936	165
Number of marketing employees	299	1150	122 - 476	12	0	9964	162

Topic 7: Marketing Jobs

To what extent are new technologies replacing marketing employees in your company?

	Mean & SD	Not at all 1	2	3	4	5	6	A great deal 7	Total
Currently	1.92 1.39	170 57.6%	54 18.3%	32 10.8%	19 6.4%	10 3.4%	5 1.7%	5 1.7%	295 100.0%
Next three years	2.64 1.72	110 37.5%	50 17.1%	49 16.7%	36 12.3%	23 7.8%	17 5.8%	8 2.7%	293 100.0%

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
Marketing capabilities	4.78 1.39	3 1.7%	14 7.8%	14 7.8%	28 15.6%	63 35.0%	45 25.0%	13 7.2%	180 100.0%
Customer insights	4.64 1.52	6 3.3%	8 4.4%	28 15.6%	39 21.7%	41 22.8%	38 21.1%	20 11.1%	180 100.0%
Competitive intelligence	4.49 1.32	3 1.7%	9 5.0%	28 15.6%	46 25.6%	55 30.6%	28 15.6%	11 6.1%	180 100.0%
Marketing analytics	4.38 1.77	12 6.7%	23 12.8%	22 12.3%	27 15.1%	37 20.7%	39 21.8%	19 10.6%	179 100.0%
Marketing research	4.21 1.58	9 5.0%	16 8.9%	38 21.1%	38 21.1%	35 19.4%	32 17.8%	12 6.7%	180 100.0%
Marketing training	3.54 1.46	19 10.6%	27 15.1%	34 19.0%	55 30.7%	29 16.2%	12 6.7%	3 1.7%	179 100.0%

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% CI	Median	Minimum	Maximum	Total
We build new marketing capabilities ourselves by training current or hiring new employees with the skills.	53.78	31.13	49.06 - 58.50	50	0	100	167
We partner with other marketing agencies to learn new marketing skills.	17.12	21.02	13.93 - 20.31	10	0	100	167
We partner with other consultancies to learn new marketing skills.	13.91	18.73	11.07 - 16.75	10	0	100	167
We partner with other companies to learn new marketing skills.	12.20	15.97	9.77 - 14.62	10	0	100	167
We buy other companies to acquire new marketing skills.	2.99	10.08	1.47 - 4.52	0	0	90	167

Topic 8: Marketing Organization

Select the description that best captures the role of sales within your firm.

	Number	Percent	95% CI
Sales and marketing work together on an equal level	125	70.6 %	± 5.2 %
We don't have a sales function	18	10.2 %	± 2.4 %
Sales is in charge of marketing	18	10.2 %	± 2.4 %
Sales is within the marketing function	13	7.3 %	± 2.1 %
We have a sales function, but not a marketing function	3	1.7 %	± 1.0 %
Total	177	100.0 %	

Missing Cases = 164

Response Percent = 51.9 %

Topic 8: Marketing Organization

How would you rate the level of cooperation between marketing and sales in your company?

	Number	Percent	95% CI
1=Not at all	5	3.0 %	± 1.3 %
2	4	2.4 %	± 1.2 %
3	4	2.4 %	± 1.2 %
4	24	14.3 %	± 2.7 %
5	47	28.0 %	± 3.7 %
6	46	27.4 %	± 3.7 %
7= Very effective	38	22.6 %	± 3.4 %
Total	168	100.0 %	

Mean = 5.35

SD = 1.41

Missing Cases = 173

Response Percent = 49.3 %

Topic 9: Marketing Leadership

What is marketing primarily responsible for in your firm?

	Number	Percent	95% CI
Brand	172	91.0 %	± 4.1 %
Digital marketing	162	85.7 %	± 5.0 %
Advertising	159	84.1 %	± 5.3 %
Social media	147	77.8 %	± 6.0 %
Marketing analytics	142	75.1 %	± 6.2 %
Promotion	133	70.4 %	± 6.6 %
Marketing research	128	67.7 %	± 6.7 %
Positioning	122	64.6 %	± 6.9 %
Public relations	118	62.4 %	± 7.0 %
Lead generation	117	61.9 %	± 7.0 %
Insight	100	52.9 %	± 7.2 %
Competitive intelligence	98	51.9 %	± 7.2 %
Customer experience	86	45.5 %	± 7.2 %
Market entry strategies	70	37.0 %	± 7.0 %
Customer relationship management	69	36.5 %	± 6.9 %
Revenue Growth	68	36.0 %	± 6.9 %
New products	60	31.7 %	± 6.7 %
Innovation	46	24.3 %	± 6.2 %
e-commerce	44	23.3 %	± 6.1 %
Pricing	44	23.3 %	± 6.1 %
Market selection	39	20.6 %	± 5.8 %
Sales	36	19.0 %	± 5.7 %
Distribution	20	10.6 %	± 4.4 %
Customer service	16	8.5 %	± 4.0 %
Stock market performance	4	2.1 %	± 2.1 %
Total	2200		

Number of Cases = 189

Number of Responses = 2200

Average Number of Responses Per Case = 11.6

Number of Cases With At Least One Response = 189

Response Percent = 100.0 %

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	50	26.5 %	± 3.8 %
No	139	73.5 %	± 5.3 %
Total	189	100.0 %	

Missing Cases = 152

Response Percent = 55.4 %

Topic 9: Marketing Leadership

To what extent have new technologies strengthened or weakened the importance of marketing in your company.

	Number	Percent	95% CI
-7=Significantly weakened	0	0.0 %	± 0.0 %
-6	0	0.0 %	± 0.0 %
-5	2	0.7 %	± 0.8 %
-4	6	2.0 %	± 1.4 %
-3	5	1.7 %	± 1.3 %
-2	3	1.0 %	± 1.0 %
-1	5	1.7 %	± 1.3 %
0	72	24.2 %	± 4.4 %
1	9	3.0 %	± 1.7 %
2	21	7.0 %	± 2.6 %
3	40	13.4 %	± 3.4 %
4	47	15.8 %	± 3.7 %
5	43	14.4 %	± 3.5 %
6	10	3.4 %	± 1.8 %
7=Significantly strengthened	35	11.7 %	± 3.2 %
Total	298	100.0 %	

Mean = 2.75

SD = 2.79

Missing Cases = 43

Response Percent = 87.4 %

Topic 9: Marketing Leadership

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Managing the present	68.49	19.65	65.62 - 71.37	75	15	100	180
Preparing for the future	31.51	19.65	28.63 - 34.38	25	0	85	180

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?	7.22	6.72	6.29 - 8.15	5	0	25.21	201
...Will you spend in on marketing analytics the next three years?	11.55	9.10	10.28 - 12.82	10	0	32.34	197

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 = 39.27

Median = 30

Standard Deviation (Unbiased Estimate) = 32.72

95 Percent Confidence Interval around the mean = 34.74 - 43.80

Valid Cases = 200

Missing Cases = 141

Response Percent = 58.7%

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	28	13.3 %	± 2.9 %
2	20	9.5 %	± 2.5 %
3	34	16.1 %	± 3.2 %
4	23	10.9 %	± 2.7 %
5	53	25.1 %	± 3.9 %
6	29	13.7 %	± 3.0 %
7=Very Highly	24	11.4 %	± 2.7 %
Total	211	100.0 %	

Mean = 4.12

SD = 1.89

Missing Cases = 130

Response Percent = 61.9 %

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	89	41.6 %	± 4.7 %
We have a good qualitative sense of the impact, but not a quantitative impact	85	39.7 %	± 4.6 %
We haven't been able to show the impact yet	40	18.7 %	± 3.4 %
Total	214	100.0 %	

Missing Cases = 127

Response Percent = 62.8 %

Topic 10: Marketing Analytics

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

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Important	Total
Currently	2.44 1.78	130 44.5%	56 19.2%	41 14.0%	18 6.2%	23 7.9%	8 2.7%	16 5.5%	292 100.0%
Next three years	3.89 2.03	52 17.8%	32 11.0%	45 15.4%	49 16.8%	40 13.7%	29 9.9%	45 15.4%	292 100.0%

Topic 10: Marketing Analytics

To what extent are blockchain technologies affecting your company's marketing strategies?

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Important	Total
Currently	1.39 0.94	230 79.9%	26 9.0%	18 6.3%	9 3.1%	3 1.0%	0 0.0%	2 0.7%	288 100.0%
Next three years	2.29 1.61	139 47.4%	45 15.4%	51 17.4%	26 8.9%	14 4.8%	10 3.4%	8 2.7%	293 100.0%

Appendix: Firm-level Descriptive Information

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

	Number	Percent	95% CI
B2B - Product	114	33.6 %	± 5.0 %
B2B - Services	104	30.7 %	± 4.9 %
B2C - Product	79	23.3 %	± 4.5 %
B2C - Services	42	12.4 %	± 3.5 %
Total	339	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]	52	15.3 %	± 3.8 %
Professional Services/Consulting	48	14.1 %	± 3.7 %
Manufacturing	38	11.2 %	± 3.4 %
Banking/Finance/Insurance	35	10.3 %	± 3.2 %
Retail/Wholesale	32	9.4 %	± 3.1 %
Healthcare	32	9.4 %	± 3.1 %
Consumer Packaged Goods	29	8.5 %	± 3.0 %
Communications/Media	23	6.8 %	± 2.7 %
Consumer Services	14	4.1 %	± 2.1 %
Education	13	3.8 %	± 2.0 %
Transportation	13	3.8 %	± 2.0 %
Energy	6	1.8 %	± 1.4 %
Mining/Construction	5	1.5 %	± 1.3 %
Total	340	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	90	26.9 %	26.9 %
\$26-99 million	49	14.6 %	41.5 %
\$100-499 million	51	15.2 %	56.7 %
\$500-999 million	25	7.5 %	64.2 %
\$1-2.5 billion	32	9.6 %	73.7 %
\$2.6-5 billion	20	6.0 %	79.7 %
\$5.1-9.9 billion	26	7.8 %	87.5 %
\$10-49 billion	26	7.8 %	95.2 %
\$50-100 billion	9	2.7 %	97.9 %
More than \$100+ billion	7	2.1 %	100.0 %
Total	335	100.0 %	100.0 %

Missing Cases = 6

Response Percent = 98.2 %