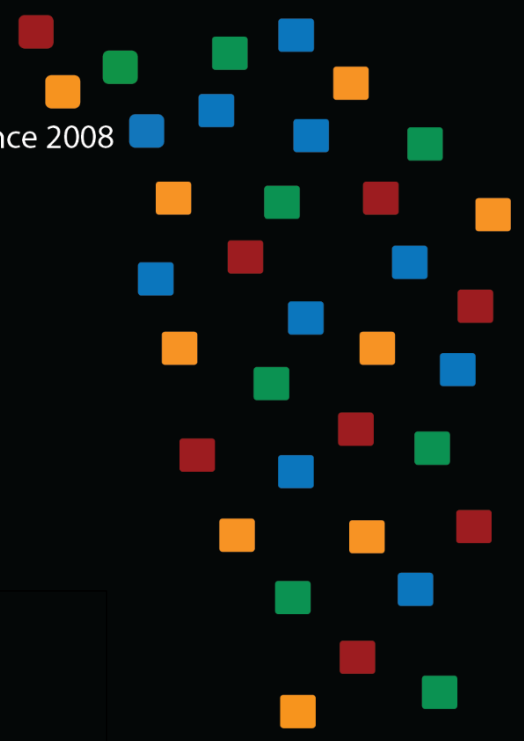


# The **CMO** Survey

since 2008



## Topline Report

AUGUST 2021





## **Managing and Measuring Marketing Spending for Growth and Returns**

### **The 27<sup>th</sup> Edition of The CMO Survey, August 2021**

This 27th Edition of The CMO Survey finds that marketing leaders are taking on more responsibilities as their companies rise to meet the ongoing challenge of COVID-19 and associated digital and go-to-market opportunities. Digital marketing spending reached 58% of marketing budgets, reflecting 15.8% growth over the last year. With this increase, marketing leaders have been asked to lead their companies' digital marketing transformations in 73% of companies, take on a larger share of responsibility in strategic marketing activities across the company, and assist in the preparation for board meetings and earning calls at levels higher than expected.

Survey questions probe actions marketing leaders take when making the case for marketing spending and when using marketing to pursue growth opportunities. The level of pressure from the CEO, CFO, and Board to prove the impact of marketing is reported as well as how consistently over two dozen metrics are used to demonstrate marketing returns.

Drawing on the power of The CMO Survey's longitudinal view, this edition also examines marketing spending and performance over time and specific growth strategies used. Insights related to marketing spending and strategies related to Diversity, Equity, and Inclusion are documented as well as marketing leaders' views on how the work-from-home versus work-from-office debate will affect their marketing employee ranks.

I hope these observations, insights, and benchmarks will be useful to you and your company. Special thanks to all the marketing leaders who gave their time and good will to make these findings possible.

Christine Moorman  
T. Austin Finch, Sr. Professor of Business Administration  
Fuqua School of Business, Duke University  
Founder and Director, The CMO Survey<sup>®</sup>

## **Managing and Measuring Marketing Spending**



# for Growth and Returns

## The 27<sup>th</sup> Edition of The CMO Survey, August 2021

### Survey Sample

2791 marketing leaders at U.S. for-profit companies; 282 responded for a 10.1% response rate—94.1% of respondents are VP-level or above.

### Survey Administration

The survey was in field from August 4-25, 2021. It was administered via email with follow-up reminders.

### Survey Reports

- [The Topline Report](#) offers an aggregate view of survey results
- [The Highlights and Insights Report](#) shares key survey metrics, trends, and insights over time
- [The Firm and Industry Breakout Report](#) displays survey results by sectors, size, and sales

### Overview of The CMO Survey<sup>®</sup>

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.

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 survey is an objective source of information about marketing and a non-commercial service dedicated to improving the field of marketing.

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

**Deloitte.**





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**Topic 1: Macroeconomic Forecasts****Are you more or less optimistic about the U.S. economy compared to last quarter?**

	Number	Percent	95% CI
3=More	88	32.7 %	± 5.4 %
2=No Change	81	30.1 %	± 5.3 %
1=Less	100	37.2 %	± 5.6 %
Total	269	100.0 %	

Mean = 1.96

SD = 0.84

Missing Cases = 13

Response Percent = 95.4 %



## Topic 1: Macroeconomic Forecasts

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

Minimum = 38.35

Maximum = 100

Mean = 69.62

Median = 70

Standard Deviation (Unbiased Estimate) = 14.58

95 Percent Confidence Interval Around the Mean = 67.88 - 71.37

Valid Cases = 269

Missing Cases = 13

Response Percent = 95.4%



## Topic 2: Customer Behavior

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

(N=259)

	Mean & SD	1	2	3	Total
Low price	1.98 0.82	34 13.1%	33 12.7%	32 12.4%	99 38.2%
Superior product quality	1.69 0.76	83 32.0%	57 22.0%	30 11.6%	170 65.6%
Superior innovation	1.98 0.86	33 12.7%	24 9.3%	31 12.0%	88 34.0%
Excellent service	2.13 0.78	35 13.5%	56 21.6%	54 20.8%	145 56.0%
Trusting relationship	2.08 0.85	47 18.1%	39 15.1%	59 22.8%	145 56.0%
Customer experience	2.20 0.76	27 10.4%	50 19.3%	53 20.5%	130 50.2%

\*Respondents were asked to focus on their largest U.S. sales revenue market.





### Topic 3: The Digital Marketing Transformation

#### **Considering your company's digital marketing transformation, how would you rate your company's progress to date?**

	Number	Percent	95% CI
Nascent: Early steps to design and visualize transformation	21	8.6 %	± 3.1 %
Emerging: Build non-integrated digital elements	130	53.1 %	± 5.9 %
Integrated: Fully integrate digital investments across company	66	26.9 %	± 5.0 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	28	11.4 %	± 3.5 %
Total	245	100.0 %	

Missing Cases = 37

Response Percent = 86.9 %



### Topic 3: The Digital Marketing Transformation

#### Where was your company on this digital marketing transformation journey last year at this time?

	Number	Percent	95% CI
Nascent: Early steps to design and visualize transformation	76	31.1 %	± 5.2 %
Emerging: Build non-integrated digital elements	111	45.5 %	± 5.7 %
Integrated: Fully integrate digital investments across company	44	18.0 %	± 4.3 %
Institutionalized/Established: Leverage digital investments to drive and evaluate marketing decisions	13	5.3 %	± 2.5 %
Total	244	100.0 %	

Missing Cases = 38

Response Percent = 86.5 %



### Topic 3: The Digital Marketing Transformation

#### **What percent of your company's digital marketing transformation is led by a senior marketing leader versus leaders in other functions in your company?**

Minimum = 0

Maximum = 100

Mean = 73.03

Median = 80

Standard Deviation (Unbiased Estimate) = 29.68

95 Percent Confidence Interval Around the Mean = 69.28 - 76.79

Valid Cases = 240

Missing Cases = 42

Response Percent = 85.1%



### Topic 3: The Digital Marketing Transformation

**Below are some examples of how digital marketing can help a company. Which of these matters most to your company? Please indicate the relative importance of each by allocating 100 points across them.**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Directly driving business outcomes (e.g., increased revenue, sales, volume, profit)	39.2	21.5	36.5 - 41.9	40	0	100	239
Shaping marketing communication initiatives (e.g., targeting communications)	26.9	18.1	24.6 - 29.2	22.5	0	100	239
Helping deliver interactive customer experiences (e.g., omni-channel, consistent and engaging experience, seamless app experience & performance)	19.8	14.4	18.0 - 21.6	20	0	80	239
Improving internal efficiencies by utilizing new technology solution	14.0	11.4	12.6 - 15.5	10	0	80	239



### Topic 3: The Digital Marketing Transformation

**Thinking about your company's digital marketing knowledge and skills, rate your company's current expertise level on the following scale.**

	Number	Percent	95% CI
1=Significantly below industry average	7	2.9 %	± 1.8 %
2	4	1.7 %	± 1.4 %
3	12	5.0 %	± 2.4 %
4	23	9.6 %	± 3.2 %
5=At industry average	37	15.4 %	± 4.0 %
6	36	15.0 %	± 3.9 %
7	56	23.3 %	± 4.7 %
8	40	16.7 %	± 4.1 %
9	17	7.1 %	± 2.8 %
10=Significantly above industry average	8	3.3 %	± 2.0 %
Total	240	100.0 %	

Mean = 6.20

SD = 2.01

Missing Cases = 42

Response Percent = 85.1 %



### Topic 3: The Digital Marketing Transformation

#### **What investments did your company make to improve the performance of your digital marketing activities over the last year? (check all that apply)**

	Number	Percent	95% CI
Optimizing our company website	185	77.4 %	± 5.3 %
Digital media and search	165	69.0 %	± 5.9 %
Data analytics	157	65.7 %	± 6.1 %
Direct digital marketing (e.g., email)	152	63.6 %	± 6.1 %
Marketing technology systems or platforms	146	61.1 %	± 6.2 %
Online experimentation and/or A/B testing	110	46.0 %	± 6.4 %
Managing privacy issues	70	29.3 %	± 5.8 %
Machine learning and automation	62	25.9 %	± 5.6 %
<u>Improving our app</u>	44	18.4 %	± 5.0 %
Total	1091		

Number of Cases = 239

Number of Responses = 1091

Average Number of Responses Per Case = 4.6

Number of Cases With At Least One Response = 239

Response Percent = 100.0 %



### Topic 3: The Digital Marketing Transformation

**To what extent is your company using artificial intelligence or machine learning in optimizing and automating marketing efforts? (0% of the time-100% of the time)**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Current	11.78	18.11	9.47 - 14.09	5	0	100	236
Next three years	37.69	28.01	34.10 - 41.28	30	0	100	234



## Topic 4: Managing Marketing Spending and Returns

### Check the category that best describes how your company's marketing budget is set.

	Number	Percent	95% CI
Budgets are set as a percentage of projected revenue.	40	21.1 %	± 4.1 %
Budgets are built from scratch every year based on new needs and objectives.	53	27.9 %	± 4.6 %
Budget is revisited and if needed, reset every month or quarter depending on what is needed to meet our objectives.	19	10.0 %	± 3.0 %
Budgets are set on a yearly basis based on previous year's expenses, and adjusted during the year if needed.	78	41.1 %	± 5.3 %
Total	190	100.0 %	

Missing Cases = 92

Response Percent = 67.4 %





#### Topic 4: Managing Marketing Spending and Returns

##### **When making a case for marketing spending, how often do the following behaviors occur among senior marketing leaders in your organization?**

(N=282)

	Mean	1=All the time	Most of the time	Some of the time	Very little of the time	5=None of the time	Total
Marketing builds a business case based on how marketing spending is aligned with business priorities and strategies.	1.92	85 41.1%	76 36.7%	28 13.5%	13 6.3%	5 2.4%	207 100.0%
Marketing sets reasonable expectations about how marketing spending will influence returns.	2.09	62 30.0%	93 44.9%	32 15.5%	12 5.8%	8 3.9%	207 100.0%
Marketing explains its hypotheses about the impact of marketing spending.	2.17	58 28.0%	90 43.5%	32 15.5%	19 9.2%	8 3.9%	207 100.0%
Marketing runs experiments to make the case for the impact of marketing spending.	2.76	21 10.3%	61 29.9%	81 39.7%	27 13.2%	14 6.9%	204 100.0%
Marketing builds a business case for the marketing spending based on financial returns.	2.43	46 22.7%	71 35.0%	50 24.6%	25 12.3%	11 5.4%	203 100.0%
Marketing is able to show the impact on of marketing spending on intermediate KPIs (such as customer or brand outcomes) on the way to financial returns.	2.48	42 20.4%	72 35.0%	56 27.2%	23 11.2%	13 6.3%	206 100.0%



## Topic 4: Managing Marketing Spending and Returns

### How likely the following activities are to occur in managing marketing budgets in your organization:

(N=282)

	Mean	1=Not at all	2	3	4	5	6	7=Very Likely	Total
The CFO works as a business partner with marketing leaders to build a business case for marketing spending.	4.32	24 11.7%	21 10.2%	26 12.7%	30 14.6%	39 19.0%	29 14.1%	36 17.6%	205 100.0%
Marketing meets one-on-one with other C-suite members to explain marketing's impact on the bottom line.	5.09	9 4.4%	17 8.4%	16 7.9%	15 7.4%	46 22.7%	48 23.6%	52 25.6%	203 100.0%
Non-marketing leaders perceive marketing as a cost, not as an investment.	3.73	32 15.6%	31 15.1%	35 17.1%	33 16.1%	29 14.1%	26 12.7%	19 9.3%	205 100.0%
Non-marketing leaders tend to focus on the short-run effects of marketing spending.	4.72	16 7.8%	15 7.3%	16 7.8%	30 14.6%	45 22.0%	53 25.9%	30 14.6%	205 100.0%
Non-marketing leaders are not patient for the long-run effects of marketing spending.	4.57	14 6.9%	21 10.3%	21 10.3%	35 17.2%	34 16.7%	49 24.0%	30 14.7%	204 100.0%



#### Topic 4: Managing Marketing Spending and Returns

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

	Number	Percent	95% CI
We prove the impact quantitatively	107	51.4 %	± 5.7 %
We have a good qualitative sense of the impact, but not a quantitative impact	81	38.9 %	± 5.3 %
We haven't been able to show the impact yet	20	9.6 %	± 3.0 %
Total	208	100.0 %	

Missing Cases = 74

Response Percent = 73.8 %



#### Topic 4: Managing Marketing Spending and Returns

#### **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	67	32.1 %	± 5.0 %
We have a good qualitative sense of the impact, but not a quantitative impact	108	51.7 %	± 5.7 %
We haven't been able to show the impact yet	34	16.3 %	± 3.8 %
Total	209	100.0 %	

Missing Cases = 73

Response Percent = 74.1 %



#### Topic 4: Managing Marketing Spending and Returns

##### **Rate whether marketing feels increasing pressure from the following leaders to prove the value of marketing.**

(N=282)

	Yes	No	Total
CEO	121 58.7%	85 41.3%	206 100.0%
Board	78 38.8%	123 61.2%	201 100.0%
CFO	92 45.1%	112 54.9%	204 100.0%



## Topic 4: Managing Marketing Spending and Returns

### Marketing expenses account for what percent of your company's overall budget?

Minimum = 0.00

Maximum = 39.27

Mean = 12.12

Median = 10

Standard Deviation (Unbiased Estimate) = 10.56

95 Percent Confidence Interval Around the Mean = 10.47 - 13.76

Valid Cases = 158

Missing Cases = 124

Response Percent = 56.0%



## Topic 4: Managing Marketing Spending and Returns

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

Minimum = 0

Maximum = 36.61

Mean = 8.60

Median = 5

Standard Deviation (Unbiased Estimate) = 10.00

95 Percent Confidence Interval Around the Mean = 7.09 - 10.11

Valid Cases = 168

Missing Cases = 114

Response Percent = 59.6%



**Topic 4: Managing Marketing Spending and Returns**

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	5.15	25.71	1.35 - 8.96	5	-51.36	64.08	175
Digital marketing spending	15.84	26.17	11.93 - 19.75	10	-100	100	172





#### Topic 4: Managing Marketing Spending and Returns

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	14.65	16.29	12.16 - 17.13	10	-24.72	55.75	165
Overall marketing spending	13.41	16.77	10.86 - 15.95	10	-27.54	56.45	167
New product introductions	10.31	13.96	8.15 - 12.48	8	-28.79	50.97	160
Brand building	9.07	15.18	6.74 - 11.41	5	-35.10	54.63	162
Customer relationship management	7.19	11.61	5.39 - 9.00	4	-23.97	39.11	159
New service introductions	5.58	9.34	4.12 - 7.04	0	-25.79	37.89	158
Traditional advertising spending	1.36	11.96	-0.46 - 3.18	0	-34.02	36.19	166



**Topic 4: Managing Marketing Spending and Returns**

**What percent of your marketing budget does your company currently spend on digital and non-digital marketing activities?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Percent digital	57.91	27.65	3.7-62.1	60	4	100	169
Percent non-digital	42.09	27.63	7.9-46.3	40	0	96	169



#### Topic 4: Managing Marketing Spending and Returns

### **What percent of your marketing budget is currently spent on initiatives related to customer experience?**

Minimum = 0

Maximum = 100

Mean = 14.42

Median = 10

Standard Deviation (Unbiased Estimate) = 18.86

95 Percent Confidence Interval Around the Mean = 11.59 - 17.25

Valid Cases = 171

Missing Cases = 111

Response Percent = 60.6%



## Topic 4: Managing Marketing Spending and Returns

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

<u>Number</u>	<u>Percent</u>	<u>95% CI</u>
Direct expenses of marketing activities	176	95.7 % ± 3.0 %
Social media marketing	171	92.9 % ± 3.7 %
Brand-related expenses	149	81.0 % ± 5.7 %
Marketing employees	148	80.4 % ± 5.8 %
Marketing technologies	138	75.0 % ± 6.3 %
Marketing analytics	135	73.4 % ± 6.4 %
Marketing research	132	71.7 % ± 6.6 %
Other overhead costs associated with marketing	127	69.0 % ± 6.7 %
Mobile marketing	110	59.8 % ± 7.2 %
Marketing training	96	52.2 % ± 7.3 %
Customer experience expenses	88	47.8 % ± 7.3 %
Sales support tools	66	35.9 % ± 7.0 %
<u>Sales employees</u>	17	9.2 % ± 4.2 %
Total	1553	

Number of Cases = 184

Number of Responses = 1553

Average Number of Responses Per Case = 8.4

Number of Cases With At Least One Response = 184

Response Percent = 100.0 %



## Topic 5: Marketing Metrics and Performance

**Distribute 100 points to reflect the degree to which these metrics are used in your company to evaluate the impact of marketing actions.**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Impact on sales or sales lift	24.8	18.9	22.3 - 27.3	20	0	100	216
Engagement related metrics (e.g., clicks, likes, email signup, customer ratings & reviews)	22.9	20.0	20.2 - 25.6	20	0	100	216
ROI	13.9	14.5	12.0 - 15.9	10	0	100	216
Other sales metrics (e.g., penetration, frequency, lead conversion, lead churn, market share)	12.4	13.6	10.6 - 14.2	10	0	100	216
Satisfaction and referral metrics (e.g., NPS)	10.0	12.0	8.4 - 11.6	10	0	90	216
Customer retention or lifetime value metrics	9.6	10.7	8.2 - 11.1	10	0	50	216
Brand equity metrics	6.3	8.3	5.2 - 7.4	5	0	50	216



## Topic 5: Marketing Metrics and Performance

### How consistently do you measure the following components of marketing?

(N=221)

	Almost never	Ad hoc / when needed	Annually or semi-annually	Quarterly or monthly	Always / consistently	Total
Sales, revenues	3 1.4%	6 2.7%	7 3.2%	31 14.0%	174 78.7%	221 100.0%
Market share, account share	32 14.7%	51 23.5%	57 26.3%	49 22.6%	28 12.9%	217 100.0%
Distribution, product availability	65 30.7%	37 17.5%	20 9.4%	32 15.1%	58 27.4%	212 100.0%
Sales expense-to-revenue ratio (E/R)	35 16.3%	44 20.5%	34 15.8%	66 30.7%	36 16.7%	215 100.0%
Cost of customer acquisition	34 15.6%	61 28.0%	38 17.4%	51 23.4%	34 15.6%	218 100.0%
Customer churn, retention rate, loyalty	18 8.4%	48 22.3%	48 22.3%	58 27.0%	43 20.0%	215 100.0%
Customer lifetime value (CLV), customer profitability	48 22.2%	61 28.2%	52 24.1%	37 17.1%	18 8.3%	216 100.0%
Brand awareness	43 19.7%	57 26.1%	53 24.3%	39 17.9%	26 11.9%	218 100.0%
Brand personality, associations, affinity	64 29.5%	65 30.0%	47 21.7%	27 12.4%	14 6.5%	217 100.0%
Brand differentiation, customer willingness to pay price premium	48 21.9%	73 33.3%	56 25.6%	32 14.6%	10 4.6%	219 100.0%
Brand equity value	76 35.3%	64 29.8%	45 20.9%	23 10.7%	7 3.3%	215 100.0%
Customer experience/engagement	14 6.4%	41 18.8%	45 20.6%	51 23.4%	67 30.7%	218 100.0%
Net Promoter Score (NPS), willingness to recommend	36 16.5%	41 18.8%	46 21.1%	51 23.4%	44 20.2%	218 100.0%
Digital/web/mobile performance	7 3.2%	7 3.2%	8 3.7%	77 35.2%	120 54.8%	219 100.0%
Content engagement	4 1.9%	22 10.2%	18 8.3%	78 36.1%	94 43.5%	216 100.0%
Speed to market, agility	60 28.4%	62 29.4%	33 15.6%	34 16.1%	22 10.4%	211 100.0%



## Topic 5: Marketing Metrics and Performance

### How consistently do you measure the following components of marketing?

	Almost never	Ad hoc / when needed	Annually or semi-annually	Quarterly or monthly	Always / consistently	Total
Campaign costs, efficiency, e.g., production, content reuse	18 8.2%	33 15.1%	23 10.5%	81 37.0%	64 29.2%	219 100.0%
Campaign effectiveness (e.g., GRPs, reach, frequency)	21 9.7%	33 15.2%	28 12.9%	75 34.6%	60 27.6%	217 100.0%
Lead generation	27 12.5%	29 13.4%	12 5.6%	47 21.8%	101 46.8%	216 100.0%
Lead conversion	26 12.1%	31 14.5%	17 7.9%	50 23.4%	90 42.1%	214 100.0%
Campaign ROI	15 7.0%	46 21.4%	30 14.0%	67 31.2%	57 26.5%	215 100.0%
Customer/market insight quality-breadth and depth	33 15.6%	72 34.0%	52 24.5%	44 20.8%	11 5.2%	212 100.0%
Customer/market insight usage	35 16.1%	72 33.2%	52 24.0%	43 19.8%	15 6.9%	217 100.0%
Agency/partner/vendor costs	32 14.7%	44 20.3%	62 28.6%	54 24.9%	25 11.5%	217 100.0%
Marketing infrastructure investments (data, tools, technology)	18 8.4%	41 19.2%	80 37.4%	58 27.1%	17 7.9%	214 100.0%
Overall marketing budgets (incl. headcount, training, research, etc.)	10 4.6%	13 6.0%	82 37.8%	78 35.9%	34 15.7%	217 100.0%



## Topic 5: Marketing Metrics and Performance

### Compared to 2020, rate your company's performance during the prior 12 months: Sales revenue

	Number	Percent	Cumulative
-75%	3	1.7 %	1.7 %
-50%	1	0.6 %	2.3 %
-40%	1	0.6 %	2.9 %
-30%	4	2.3 %	5.2 %
-20%	8	4.6 %	9.8 %
-10%	13	7.5 %	17.3 %
-7%	1	0.6 %	17.9 %
-5%	4	2.3 %	20.2 %
-3%	4	2.3 %	22.5 %
-1%	0	0.0 %	22.5 %
0	4	2.3 %	24.9 %
+1%	2	1.2 %	26.0 %
+3%	6	3.5 %	29.5 %
+5%	12	6.9 %	36.4 %
+7%	13	7.5 %	43.9 %
+10%	30	17.3 %	61.3 %
+20%	33	19.1 %	80.3 %
+30%	13	7.5 %	87.9 %
+40%	9	5.2 %	93.1 %
+50%	4	2.3 %	95.4 %
+75%	8	4.6 %	100.0 %
Total	173	100.0 %	100.0 %

Mean = 11.08%

SD = 24.86

Missing Cases = 109

Response Percent = 61.3 %





## Topic 5: Marketing Metrics and Performance

### Compared to 2020, rate your company's performance during the prior 12 months: Profits

	Number	Percent	Cumulative
-75%	3	1.8 %	1.8 %
-50%	1	0.6 %	2.4 %
-40%	1	0.6 %	3.0 %
-30%	4	2.4 %	5.5 %
-20%	7	4.3 %	9.8 %
-10%	11	6.7 %	16.5 %
-7%	0	0.0 %	16.5 %
-5%	4	2.4 %	18.9 %
-3%	4	2.4 %	21.3 %
-1%	2	1.2 %	22.6 %
0	11	6.7 %	29.3 %
+1%	1	0.6 %	29.9 %
+3%	7	4.3 %	34.1 %
+5%	11	6.7 %	40.9 %
+7%	8	4.9 %	45.7 %
+10%	30	18.3 %	64.0 %
+20%	28	17.1 %	81.1 %
+30%	13	7.9 %	89.0 %
+40%	3	1.8 %	90.9 %
+50%	8	4.9 %	95.7 %
+75%	7	4.3 %	100.0 %
Total	164	100.0 %	100.0 %

Mean = 10.42%

SD = 24.97

Missing Cases = 118

Response Percent = 58.2 %



## Topic 5: Marketing Metrics and Performance

### Compared to 2020, rate your company's performance during the prior 12 months: Customer acquisition

	Number	Percent	Cumulative
-75%	4	2.5 %	2.5 %
-50%	0	0.0 %	2.5 %
-40%	1	0.6 %	3.1 %
-30%	2	1.2 %	4.3 %
-20%	2	1.2 %	5.5 %
-10%	5	3.1 %	8.6 %
-7%	1	0.6 %	9.2 %
-5%	5	3.1 %	12.3 %
-3%	4	2.5 %	14.7 %
-1%	2	1.2 %	16.0 %
0	16	9.8 %	25.8 %
+1%	6	3.7 %	29.4 %
+3%	12	7.4 %	36.8 %
+5%	27	16.6 %	53.4 %
+7%	8	4.9 %	58.3 %
+10%	30	18.4 %	76.7 %
+20%	20	12.3 %	89.0 %
+30%	11	6.7 %	95.7 %
+40%	3	1.8 %	97.5 %
+50%	2	1.2 %	98.8 %
+75%	2	1.2 %	100.0 %
Total	163	100.0 %	100.0 %

Mean = 6.73%

SD = 19.75

Missing Cases = 119

Response Percent = 57.8 %



## Topic 5: Marketing Metrics and Performance

### Compared to 2020, rate your company's performance during the prior 12 months: Customer retention

	Number	Percent	Cumulative
-75%	1	0.6 %	0.6 %
-50%	0	0.0 %	0.6 %
-40%	1	0.6 %	1.2 %
-30%	1	0.6 %	1.8 %
-20%	4	2.5 %	4.3 %
-10%	5	3.1 %	7.4 %
-7%	1	0.6 %	8.0 %
-5%	4	2.5 %	10.4 %
-3%	3	1.8 %	12.3 %
-1%	5	3.1 %	15.3 %
0	47	28.8 %	44.2 %
+1%	8	4.9 %	49.1 %
+3%	7	4.3 %	53.4 %
+5%	17	10.4 %	63.8 %
+7%	3	1.8 %	65.6 %
+10%	25	15.3 %	81.0 %
+20%	9	5.5 %	86.5 %
+30%	6	3.7 %	90.2 %
+40%	1	0.6 %	90.8 %
+50%	2	1.2 %	92.0 %
+75%	13	8.0 %	100.0 %
Total	163	100.0 %	100.0 %

Mean = 9.47%

SD = 23.26

Missing Cases = 119

Response Percent = 57.8 %



## Topic 6: Managing Growth

**Rank (1 = most important, 5 = least important) the following factors in terms of their importance for driving future organic revenue growth within your company?**

(N=196)

	Mean & SD	1	2	3	4	5	Total
Having the right talent	2.09 1.19	82 41.8%	52 26.5%	35 17.9%	16 8.2%	11 5.6%	196 100.0%
Having all stakeholders aligned	3.04 1.39	34 17.3%	42 21.4%	43 21.9%	36 18.4%	41 20.9%	196 100.0%
Having the right operating model	3.06 1.40	35 17.9%	40 20.4%	42 21.4%	37 18.9%	42 21.4%	196 100.0%
Having the right data	3.38 1.31	22 11.2%	31 15.8%	41 20.9%	55 28.1%	47 24.0%	196 100.0%
Having the right technology	3.43 1.36	23 11.7%	31 15.8%	35 17.9%	52 26.5%	55 28.1%	196 100.0%



## Topic 6: Managing Growth

### When pursuing growth opportunities, how often do the following behaviors occur in your company?

	Majority of time	Minority of time	Total
Examining other industries for actions that might inspire company growth opportunities.	100 50.3%	99 49.7%	199 100.0%
Identifying how to move the business from core strengths into adjacent digital opportunities.	88 44.4%	110 55.6%	198 100.0%
Using data insights across channels	121 61.4%	76 38.6%	197 100.0%
Effectively leveraging technology to pursue growth opportunities.	123 62.1%	75 37.9%	198 100.0%
Using an integrated marketing team in which digital and nondigital work together	153 76.9%	46 23.1%	199 100.0%
Using an integrated marketing team in which marketing and finance experts work together	69 35.0%	128 65.0%	197 100.0%
Marketing offers a strong interpretation of customer insights important to the growth opportunity	133 67.9%	63 32.1%	196 100.0%
Marketing articulates how the growth opportunity connects to the company position and strategy.	159 80.3%	39 19.7%	198 100.0%
Marketing is able to connect the growth strategy to relevant customer metrics	132 67.0%	65 33.0%	197 100.0%
Marketing builds a business case for the growth strategy	142 72.8%	53 27.2%	195 100.0%



## Topic 6: Managing Growth

**Allocate 100 points to reflect your company'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	55.43	25.7	51.8 - 59.0	52.5	0	100	197
New products/services in existing markets	20.88	18.2	18.3 - 23.4	20	0	100	197
Existing products/services in new markets	16.07	16.6	13.8 - 18.4	10	0	100	197
New products/services in new markets	7.62	9.6	6.3 - 9.0	5	0	50	197



## Topic 6: Managing Growth

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Growth from your firm internally	71.76	26.8	68.0 - 75.5	80	0	100	197
Growth from acquisitions	12.30	16.8	10.0 - 14.6	5	0	80	197
Growth from partnerships	12.22	17.7	9.7 - 14.7	5	0	100	197
Growth from licensing arrangements	3.72	9.0	2.5 - 5.0	0	0	50	197



## Topic 6: Managing Growth

### What % of your company's sales is through the Internet?

Minimum = 0

Maximum = 81.85

Mean = 17.01

Median = 4

Standard Deviation (Unbiased Estimate) = 27.92

95 Percent Confidence Interval Around the Mean = 13.68 - 20.34

Valid Cases = 270

Missing Cases = 12

Response Percent = 95.7%





## Topic 6: Managing Growth

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

Minimum = 34.27

Maximum = 100

Mean = 85.04

Median = 95

Standard Deviation (Unbiased Estimate) = 21.14

95 Percent Confidence Interval Around the Mean = 82.04 - 88.03

Valid Cases = 191

Missing Cases = 91

Response Percent = 67.7%



## Topic 6: Managing Growth

### What % of your company's sales is domestic?

Minimum = 37.29

Maximum = 100

Mean = 82.37

Median = 90

Standard Deviation (Unbiased Estimate) = 20.70

95 Percent Confidence Interval Around the Mean = 79.45 - 85.29

Valid Cases = 193

Missing Cases = 89

Response Percent = 68.4%



## Topic 6: Managing Growth

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

	Number	Percent	95% CI
Western Europe	49	49.5 %	± 9.9 %
Canada	20	20.2 %	± 7.9 %
China	8	8.1 %	± 5.4 %
Eastern Europe	4	4.0 %	± 3.9 %
Indonesia and Southeast Asia	4	4.0 %	± 3.9 %
Australia/New Zealand	3	3.0 %	± 3.4 %
Mexico	2	2.0 %	± 2.8 %
South American countries besides Brazil	2	2.0 %	± 2.8 %
Central America	2	2.0 %	± 2.8 %
Japan	2	2.0 %	± 2.8 %
Middle East	2	2.0 %	± 2.8 %
<u>Brazil</u>	1	1.0 %	± 2.0 %
Total	99	100.0 %	

Missing Cases = 2

Response Percent = 98.0 %

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



## Topic 6: Managing Growth

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

	Number	Percent	95% CI
China	18	15.8 %	± 6.1 %
Western Europe	14	12.3 %	± 5.5 %
Mexico	10	8.8 %	± 4.7 %
Africa (non-Middle East and South Africa)	10	8.8 %	± 4.7 %
Australia/New Zealand	8	7.0 %	± 4.3 %
South American countries besides Brazil	7	6.1 %	± 4.0 %
Japan	7	6.1 %	± 4.0 %
Middle East	7	6.1 %	± 4.0 %
India	7	6.1 %	± 4.0 %
Canada	5	4.4 %	± 3.4 %
Eastern Europe	5	4.4 %	± 3.4 %
Brazil	4	3.5 %	± 3.1 %
Indonesia and Southeast Asia	4	3.5 %	± 3.1 %
Scandinavia	3	2.6 %	± 2.7 %
Central America	3	2.6 %	± 2.7 %
<u>Korea</u>	2	1.8 %	± 2.2 %
Total	114	100.0 %	

Missing Cases = 14

Response Percent = 89.1 %

\*Responses from companies that have at least 1% of total sales from international markets.



## Topic 7: Social Media and Mobile Marketing

### **What percent of your marketing budget do you spend on mobile activities? Now, 12 months, 5 years?**

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing budget do you currently spend on mobile activities?	18.36	20.12	15.53 - 21.18	10	0	63.75	195
% What percent will you spend on mobile in the next 12 months?	23.05	23.66	19.72 - 26.38	20	0	100	194
What percent will you spend on mobile activities in five years?	33.61	25.32	30.01 - 37.21	30	0	84.81	190



## Topic 7: Social Media and Mobile Marketing

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

	Number	Percent	95% CI
1=Not at all	58	28.7 %	± 4.8 %
2	32	15.8 %	± 3.7 %
3	24	11.9 %	± 3.3 %
4	20	9.9 %	± 3.0 %
5	32	15.8 %	± 3.7 %
6	17	8.4 %	± 2.8 %
7=A great deal	19	9.4 %	± 3.0 %
Total	202	100.0 %	

Mean = 3.31

SD = 2.06

Missing Cases = 80

Response Percent = 71.6 %



## Topic 7: Social Media and Mobile Marketing

### What percent of your marketing budget do you spend on social media? Now, 12 months, 5 years

	Mean	SD	95% CI	Median	Total
...of your marketing budget do you currently spend on social media?	15.30	13.62	13.41 - 17.20	10	198
...will you spend in the next 12 months?	18.90	14.87	16.82 - 20.98	15	196
...do you predict you will spend in five years?	23.49	15.67	21.29 - 25.70	20	194



**Topic 7: Social Media and Mobile Marketing**

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

	Number	Percent	95% CI
1=Not At All	12	5.9 %	± 2.4 %
2	43	21.2 %	± 4.2 %
3	35	17.2 %	± 3.9 %
4	27	13.3 %	± 3.5 %
5	36	17.7 %	± 3.9 %
6	34	16.7 %	± 3.8 %
<u>7=Very Highly</u>	16	7.9 %	± 2.7 %
Total	203	100.0 %	

Mean = 3.98

SD = 1.77

Missing Cases = 79

Response Percent = 72.0 %





## Topic 7: Social Media and Mobile Marketing

### Does your company use an app?

	Number	Percent	95% CI
Yes	51	24.6 %	± 4.5 %
No	156	75.4 %	± 5.9 %
Total	207	100.0 %	

Missing Cases = 75

Response Percent = 73.4 %



## Topic 7: Social Media and Mobile Marketing

### To what degree has your app contributed to your company's performance during the last year?\*

	Number	Percent	95% CI
1=Not at all	3	6.0 %	± 6.7 %
2	10	20.0 %	± 11.3 %
3	8	16.0 %	± 10.3 %
4	6	12.0 %	± 9.2 %
5	10	20.0 %	± 11.3 %
6	5	10.0 %	± 8.5 %
7=Very Highly	8	16.0 %	± 10.3 %
Total	50	100.0 %	

Mean = 4.14

Missing Cases = 1

Response Percent = 98.0 %

\*Responses from companies that use an app.



## Topic 7: Social Media and Mobile Marketing

### Approximately what percent of revenue has your app(s) generated for your business?\*

	Number	Percent	95% CI
No revenue [0%]	11	22.9 %	± 11.7 %
Little revenue [< 5%]	16	33.3 %	± 13.2 %
Some revenue [5 - 10%]	5	10.4 %	± 8.5 %
Moderate revenue [10 - 15%]	9	18.8 %	± 10.9 %
High revenue [15%+]	7	14.6 %	± 9.8 %
Total	48	100.0 %	

Missing Cases = 3

Response Percent = 94.1 %

\*Responses from companies that use an app.



**Topic 7: Social Media and Mobile Marketing**

**Which of the following best aligns with how your app impacts your customer acquisition or retention strategy?\***

	Number	Percent	95% CI
Our app is a key piece of our customer acquisition strategy	2	4.2 %	± 5.5 %
Our app is a key piece of our customer retention strategy	22	45.8 %	± 14.1 %
Our app is both a key piece of our customer acquisition strategy and retention strategy	24	50.0 %	± 14.2 %
Total	48	100.0 %	

Missing Cases = 3

Response Percent = 94.1 %

\*Responses from companies that use an app.



## Topic 8: Marketing Leadership

### What is marketing primarily responsible for in your company?

	Number	Percent	95% CI
Digital marketing	195	94.2 %	± 3.2 %
Brand	189	91.3 %	± 3.9 %
Advertising	188	90.8 %	± 4.0 %
Social media	174	84.1 %	± 5.0 %
Promotion	161	77.8 %	± 5.7 %
Marketing analytics	158	76.3 %	± 5.8 %
Public relations	156	75.4 %	± 5.9 %
Positioning	147	71.0 %	± 6.2 %
Lead generation	146	70.5 %	± 6.3 %
Marketing research	144	69.6 %	± 6.3 %
Competitive intelligence	120	58.0 %	± 6.8 %
Insight	107	51.7 %	± 6.9 %
Customer experience	85	41.1 %	± 6.8 %
Market entry strategies	83	40.1 %	± 6.7 %
Revenue Growth	81	39.1 %	± 6.7 %
Customer relationship management	69	33.3 %	± 6.5 %
e-commerce	62	30.0 %	± 6.3 %
Market selection	58	28.0 %	± 6.2 %
New products	53	25.6 %	± 6.0 %
Innovation	52	25.1 %	± 6.0 %
Pricing	51	24.6 %	± 5.9 %
Sales	43	20.8 %	± 5.6 %
Customer service	26	12.6 %	± 4.6 %
Distribution	16	7.7 %	± 3.7 %
Stock market performance	3	1.4 %	± 1.6 %
Total	2567		

Number of Cases = 207

Number of Responses = 2567

Average Number of Responses Per Case = 12.4

Number of Cases With At Least One Response = 207

Response Percent = 100.0 %



**Topic 8: Marketing Leadership**

**How many years have you served as your company’s senior marketing leader? How many years has your company’s senior marketing leader served in this role in your company?\***

	Median	Mean	SD	Minimum	Maximum	Total
Years in senior marketing leader role	3	5.70	5.35	1	19.66	205

\*Data were combined to reflect self-report and non-marketing leader report of years in role.



## Topic 8: Marketing Leadership

### **How often is the senior marketing leader asked by the CEO or CFO to participate in board meetings and in the preparation for earnings calls?**

(N=282)

	Mean	1=Never	2	3	4	5	6	7=All the time	Total
Board meetings	4.93	27 13.4%	19 9.4%	7 3.5%	29 14.4%	12 5.9%	22 10.9%	86 42.6%	202 100.0%
Preparation for earnings calls	3.61	68 36.4%	17 9.1%	10 5.3%	19 10.2%	14 7.5%	15 8.0%	44 23.5%	187 100.0%



## Topic 9: Marketing and Diversity, Equity, and Inclusion

### Relative to a year ago, rate the success your company has had in improving the DE&I of its marketing activities:

(N=282)

	No Change	25% more	50% more	100% more	Total
Marketing employees	98 50.5%	58 29.9%	31 16.0%	7 3.6%	194 100.0%
Marketing partnerships	121 62.7%	50 25.9%	19 9.8%	3 1.6%	193 100.0%
Segmentation & targeting	103 53.1%	59 30.4%	29 14.9%	3 1.5%	194 100.0%
Product and service design	113 58.9%	48 25.0%	28 14.6%	3 1.6%	192 100.0%
Communications	68 35.1%	61 31.4%	46 23.7%	19 9.8%	194 100.0%
Brand	90 46.4%	48 24.7%	44 22.7%	12 6.2%	194 100.0%
Training	80 42.8%	49 26.2%	35 18.7%	23 12.3%	187 100.0%





## Topic 9: Marketing and Diversity, Equity, and Inclusion

### **By what percent has marketing spending on DE&I changed in the last year?**

Minimum = -50

Maximum = 100

Mean = 10.56

Median = 5

Standard Deviation (Unbiased Estimate) = 19.32

95 Percent Confidence Interval Around the Mean = 7.75 - 13.37

Valid Cases = 182

Missing Cases = 100

Response Percent = 64.5%



## Topic 9: Marketing and Diversity, Equity, and Inclusion

**Rate the degree to which your company has developed an inclusive approach to marketing decision making, meaning you have established steps to review and/or evaluate marketing decisions from a DE&I perspective.**

	Number	Percent	95% CI
1=Not at all	44	23.0 %	± 4.3 %
2	21	11.0 %	± 3.1 %
3	20	10.5 %	± 3.0 %
4	44	23.0 %	± 4.3 %
5	32	16.8 %	± 3.7 %
6	20	10.5 %	± 3.0 %
7=Very Highly	10	5.2 %	± 2.2 %
Total	191	100.0 %	

Mean = 3.52

SD = 1.86

Missing Cases = 91

Response Percent = 67.7 %

**Topic 9: Marketing and Diversity, Equity, and Inclusion****Do you expect DE&I to be a priority for your company over the next five years?**

	Number	Percent	95% CI
Yes	131	67.9 %	± 5.9 %
No	62	32.1 %	± 4.9 %
Total	193	100.0 %	

Missing Cases = 89

Response Percent = 68.4 %

**Topic 9: Marketing and Diversity, Equity, and Inclusion****Do you expect DE&I to be a marketing priority for your company over the next five years?**

	Number	Percent	95% CI
Yes	115	58.7 %	± 5.8 %
No	81	41.3 %	± 5.3 %
Total	196	100.0 %	

Missing Cases = 86

Response Percent = 69.5 %



## Topic 9: Marketing and Diversity, Equity, and Inclusion

### How much is your company changing its marketing strategy to reach a more diverse set of customers?

	Number	Percent	95% CI
1=Not at all	44	23.2 %	± 4.3 %
2	22	11.6 %	± 3.2 %
3	27	14.2 %	± 3.5 %
4	40	21.1 %	± 4.1 %
5	35	18.4 %	± 3.9 %
6	14	7.4 %	± 2.6 %
Very much	8	4.2 %	± 2.0 %
Total	190	100.0 %	

Mean = 3.39

Missing Cases = 92

Response Percent = 67.4 %



## Topic 9: Marketing and Diversity, Equity, and Inclusion

### **What are the top three barriers to bringing DE&I into the core of your marketing strategy and decision making?**

(N=175)

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Lack of true top management support	1.80 0.91	21 12.0%	6 3.4%	13 7.4%	40 22.9%
Lack of good DE&I decision making processes to drive strategy	2.16 0.83	24 13.7%	26 14.9%	38 21.7%	88 50.3%
Difficulty envisioning DE&I-related opportunities	1.77 0.73	49 28.0%	50 28.6%	21 12.0%	120 68.6%
Difficulty assessing the value of DE&I-related opportunities	1.83 0.76	47 26.9%	48 27.4%	26 14.9%	121 69.1%
Difficulty designing effective DE&I-sensitive actions	2.34 0.76	15 8.6%	27 15.4%	44 25.1%	86 49.1%
Difficulty implementing DE&I changes across the organization	2.18 0.85	19 10.9%	17 9.7%	31 17.7%	67 38.3%



**Topic 9: Marketing and Diversity, Equity, and Inclusion**

**To what degree are post-pandemic work-from-home opportunities impacting your marketing organization?**

	Number	Percent	95% CI
1=Not at all	40	20.1 %	± 4.1 %
2	41	20.6 %	± 4.1 %
3	17	8.5 %	± 2.8 %
4	19	9.5 %	± 3.0 %
5	25	12.6 %	± 3.3 %
6	23	11.6 %	± 3.2 %
7=a great deal	34	17.1 %	± 3.8 %
Total	199	100.0 %	

Mean = 3.77

Missing Cases = 83

Response Percent = 70.6 %



## Topic 9: Marketing and Diversity, Equity, and Inclusion

### **Rate your agreement with the following related to your marketing employees related to working from home or office:**

(N=282)

	Yes	No	Total
I expect to lose people who want to work-from-home	63 32.6%	130 67.4%	193 100.0%
I expect to hire people who want to work-from-home	145 74.0%	51 26.0%	196 100.0%
I expect to lose people who want to work from the office	24 12.3%	171 87.7%	195 100.0%
I expect to hire people who want to work from the office	123 62.4%	74 37.6%	197 100.0%



**Appendix: Company-level Descriptive Information****What is your firm's primary economic sector?**

	Number	Percent	95% CI
B2B - Product	107	38.1 %	± 5.7 %
B2B - Services	89	31.7 %	± 5.5 %
B2C - Product	58	20.6 %	± 4.7 %
B2C - Services	27	9.6 %	± 3.5 %
Total	281	100.0 %	

Missing Cases = 1

Response Percent = 99.6 %



## Appendix: Company-level Descriptive Information

### What is your firm's primary industry sector?

	Number	Percent	95% CI
Technology [Software/Platform]	61	21.9 %	± 4.8 %
Professional Services/Consulting	31	11.1 %	± 3.7 %
Manufacturing	29	10.4 %	± 3.6 %
Consumer Packaged Goods	28	10.0 %	± 3.5 %
Communications/Media	22	7.9 %	± 3.2 %
Healthcare	21	7.5 %	± 3.1 %
Banking/Finance/Insurance	18	6.5 %	± 2.9 %
Retail	18	6.5 %	± 2.9 %
Transportation	9	3.2 %	± 2.1 %
Energy	8	2.9 %	± 2.0 %
Mining/Construction	7	2.5 %	± 1.8 %
Education	7	2.5 %	± 1.8 %
Consumer Services	6	2.2 %	± 1.7 %
Wholesale	6	2.2 %	± 1.7 %
Pharmaceuticals / Biotech	4	1.4 %	± 1.4 %
Real Estate	4	1.4 %	± 1.4 %
Total	279	100.0 %	

Missing Cases = 3

Response Percent = 98.9 %



## Appendix: Company-level Descriptive Information

### What is the number of employees in your company?

	Number	Percent	95% CI
Fewer than 50	52	18.4 %	± 4.6 %
50-99	29	10.3 %	± 3.6 %
100-499	65	23.0 %	± 4.9 %
500-999	33	11.7 %	± 3.8 %
1,000-2,499	28	9.9 %	± 3.5 %
2,500-4,999	16	5.7 %	± 2.7 %
5,000-9,999	19	6.7 %	± 2.9 %
<u>More than 10,000</u>	40	14.2 %	± 4.1 %
Total	282	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %



## Appendix: Company-level Descriptive Information

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

	Number	Percent	Cumulative
Less than \$10 million	58	20.9 %	20.9 %
\$10-25 million	25	9.0 %	30.0 %
\$26-99 million	41	14.8 %	44.8 %
\$100-499 million	60	21.7 %	66.4 %
\$500-999 million	17	6.1 %	72.6 %
\$1-2.5 billion	21	7.6 %	80.1 %
\$2.6-5 billion	25	9.0 %	89.2 %
\$5.1-9.9 billion	8	2.9 %	92.1 %
\$10-49 billion	16	5.8 %	97.8 %
<u>More than \$50+ billion</u>	<u>6</u>	<u>2.2 %</u>	<u>100.0 %</u>
Total	277	100.0 %	100.0 %

Missing Cases = 5

Response Percent = 98.2 %

# The **CMO** Survey<sup>®</sup>

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