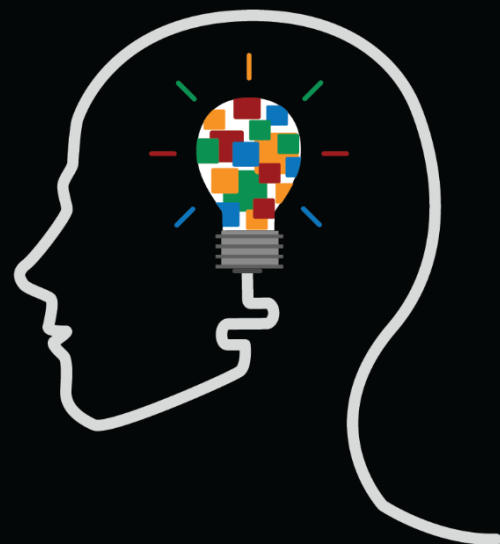


# The **CMO** Survey

since 2008

## Topline Report

FEBRUARY 2021



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## **The Transformation of Marketing: Emerging Digital, Social, and Political Trends**

### **The 26<sup>th</sup> Edition of The CMO Survey, February 2021**

We are almost a year into the Covid-19 pandemic. Amidst the tragic human loss and suffering, we have witnessed a year full of transformation and challenge for the field of marketing. Digital transformation was thrust upon companies as they sought new ways to reach and engage with their likely remote customers. This necessity inspired the rewiring of many go-to-market models and the introduction of powerful new digital interfaces. Marketing, as the function and process responsible for managing customers and the firm-marketplace interface, was placed at the center of many corporate initiatives—72% of marketing leaders responded that the role of marketing in their companies increased in importance during the last year. This importance was further heightened by the social and political upheaval experienced in the United States. Transformation required rethinking many aspects of business to more effectively approach and survive our changed world.

This 26<sup>th</sup> Edition of The CMO Survey provides the marketing profession with an understanding of how marketing activities, spending, jobs, and performance have been influenced by the upheavals of the past year. This Edition offers forward-looking insights regarding digital investments, managing new social and political demands on companies, shifting customer behavior, and managing growth during these uncertain times. Drawing on the power of The CMO Survey's longitudinal view of marketing, we develop leadership lessons applicable across periods of crisis and into the future. This Edition of the survey also involved a pilot study of U.K. marketing leaders in conjunction with the London Business School (see results at <https://cmosurvey.org/results/>).

I hope these benchmarks will be useful to you and your company as you navigate this historic period. Special thanks to all of the marketing leaders that gave their time and good will to make these insights possible.

A handwritten signature in black ink that reads 'Christine Moorman'.

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

# **The Transformation of Marketing: Emerging Digital, Social, and Political Trends**

## **The 26<sup>th</sup> Edition of The CMO Survey, February 2021**

### **Survey Sample**

2955 marketing leaders at U.S. for-profit companies; 356 responded for a 12.05% response rate; 94.5% of respondents are VP-level or above.

### **Survey Administration**

The survey was in field from January 6-26, 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 and trends over time
- The Firm and Industry Breakout Report displays survey results by sectors, size, and sales

### **Overview of 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.

**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.

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

	Number	Percent	95% CI
3=More	176	55.3 %	± 5.2 %
2=No Change	72	22.6 %	± 4.2 %
1=Less	70	22.0 %	± 4.2 %
Total	318	100.0 %	

Mean = 2.33

SD = 0.82

Missing Cases = 38

Response Percent = 89.3 %



## Topic 1: Macro-economic Forecasts

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

Minimum = 32.79

Maximum = 98.56

Mean = 66.26

Median = 70

Standard Deviation (Unbiased Estimate) = 15.20

95 Percent Confidence Interval Around the Mean = 64.59 - 67.94

Valid Cases = 317

Missing Cases = 39

Response Percent = 89.0%





## 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.**

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	2.03 0.88	51 16.9%	32 10.6%	55 18.3%	138 45.8%
Superior product quality	1.85 0.81	91 30.2%	73 24.3%	58 19.3%	222 73.8%
Superior innovation	2.15 0.78	27 9.0%	43 14.3%	44 14.6%	114 37.9%
Excellent service	2.00 0.76	62 20.6%	92 30.6%	63 20.9%	217 72.1%
Trusting relationship	2.05 0.84	70 23.3%	61 20.3%	81 26.9%	212 70.4%



## Topic 2: Customer Behavior

**If you were to insert “strong customer experience” into the above list of five factors, what rank would you give it? (where 1 is most important)**

	Number	Percent	95% CI
1	105	33.3 %	± 4.8 %
2	88	27.9 %	± 4.5 %
3	44	14.0 %	± 3.4 %
4	33	10.5 %	± 3.0 %
5	25	7.9 %	± 2.7 %
6	20	6.3 %	± 2.4 %
Total	315	100.0 %	

Mean = 2.51

SD = 1.54

Missing Cases = 41

Response Percent = 88.5 %



## Topic 2: Customer Behavior

### Focusing on this market, which customer activities increased, decreased, or had no change for your company in the prior 12 months?

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Customer's purchase volume	-0.04 0.94	130 41.9%	39 12.6%	141 45.5%	310 100.0%
Customer price per unit	0.07 0.71	90 29.3%	150 48.9%	67 21.8%	307 100.0%
Customer value placed on digital experiences	0.73 0.47	229 73.9%	78 25.2%	3 1.0%	310 100.0%
Customer value placed on company attempts to do "good"	0.46 0.53	148 47.7%	157 50.6%	5 1.6%	310 100.0%
Customer will buy related products and services from my firm	0.29 0.63	117 38.5%	159 52.3%	28 9.2%	304 100.0%
My company's ability to retain current customers	0.26 0.72	133 42.9%	126 40.6%	51 16.5%	310 100.0%
The entry of new customers into this market	0.21 0.79	135 43.4%	105 33.8%	71 22.8%	311 100.0%
My customer's ability to acquire new customers	0.30 0.80	161 51.6%	83 26.6%	68 21.8%	312 100.0%



## Topic 2: Customer Behavior

### For this market, how much do customers trust your brand?

	Number	Percent	95% CI
1= Significantly below industry average	1	0.3 %	± 0.6 %
2	1	0.3 %	± 0.6 %
3	3	1.0 %	± 1.0 %
4	6	1.9 %	± 1.3 %
5	23	7.3 %	± 2.6 %
6	17	5.4 %	± 2.2 %
7	39	12.4 %	± 3.3 %
8	94	29.8 %	± 4.6 %
9	88	27.9 %	± 4.5 %
10= Significantly above industry average	43	13.7 %	± 3.4 %
Total	315	100.0 %	

Mean = 7.94

SD = 1.62

Missing Cases = 41

Response Percent = 88.5 %

**Topic 3: Managing Marketing in the Covid-19 Pandemic****How has the role of marketing in your company changed during the last year?**

	Number	Percent	95% CI
Increased in importance	174	72.2 %	± 5.2 %
Decreased in importance	18	7.5 %	± 2.3 %
No change	49	20.3 %	± 3.6 %
Total	241	100.0 %	

Missing Cases = 115

Response Percent = 67.7 %



### Topic 3: Managing Marketing in the Covid-19 Pandemic

**What marketing objectives have you been focused on during the pandemic? (Rank your top three where 1 is high)**

	Mean & SD	1	2	3	Not Ranked	Total
Retaining current customers	1.83 0.82	79 27.9%	56 19.8%	48 17.0%	100 35.3%	283 100.0%
Building brand value that connects with customers	1.91 0.83	78 27.6%	60 21.2%	60 21.2%	85 30.0%	283 100.0%
Acquiring new customers	2.04 0.81	59 20.8%	66 23.3%	66 23.3%	92 32.5%	283 100.0%
Increasing customer awareness of brand/company	2.06 0.81	46 16.3%	54 19.1%	56 19.8%	127 44.9%	283 100.0%
Improving marketing ROI	2.26 0.74	21 7.4%	46 16.3%	52 18.4%	164 58.0%	283 100.0%



### Topic 3: Managing Marketing in the Covid-19 Pandemic

#### **Considering marketing opportunities, what activities have you shifted resources to during the pandemic? (Check all that apply)**

	Number	Percent	95% CI
Building better customer-facing digital interfaces	215	73.6 %	± 5.1 %
Transforming our go-to-market business models	153	52.4 %	± 5.8 %
Expanding into new offerings - i.e., products and services	140	47.9 %	± 5.8 %
Building partnerships	130	44.5 %	± 5.7 %
Investing in automation technologies to improve virtual communication with customers	125	42.8 %	± 5.7 %
Improving data integration to allow for end-to-end customer tracking	124	42.5 %	± 5.7 %
Expanding into new geographies, segments	84	28.8 %	± 5.2 %
Improving our research and experimentation capabilities	80	27.4 %	± 5.1 %
<u>Engaging in mergers &amp; acquisitions</u>	51	17.5 %	± 4.4 %
Total	1102		

Number of Cases = 292

Number of Responses = 1102

Average Number of Responses Per Case = 3.8

Number of Cases with at least one Response = 292

Response Percent = 100.0 %



### Topic 3: Managing Marketing in the Covid-19 Pandemic

#### How well did the marketing strategies used during the Covid-19 pandemic work in the short-term?

	Number	Percent	95% CI
1= Very Poorly	3	1.0 %	± 1.0 %
2	6	2.0 %	± 1.3 %
3	14	4.7 %	± 2.0 %
4	53	17.9 %	± 3.7 %
5	87	29.4 %	± 4.5 %
6	99	33.4 %	± 4.7 %
7= Very effectively	34	11.5 %	± 3.1 %
Total	296	100.0 %	

Mean = 5.19

SD = 1.21

Missing Cases = 60

Response Percent = 83.1 %





### Topic 3: Managing Marketing in the Covid-19 Pandemic

**Taking your best guess, to what degree do you think the marketing strategies used during the Covid-19 pandemic will be important opportunities for your company in the long-term?**

	Number	Percent	95% CI
1= Not at all	3	1.0 %	± 1.0 %
2	6	2.0 %	± 1.3 %
3	6	2.0 %	± 1.3 %
4	33	11.1 %	± 3.0 %
5	74	24.9 %	± 4.2 %
6	99	33.3 %	± 4.7 %
7= A great deal	76	25.6 %	± 4.3 %
Total	297	100.0 %	

Mean = 5.59

SD = 1.24

Missing Cases = 59

Response Percent = 83.4 %



### Topic 3: Managing Marketing in the Covid-19 Pandemic

#### **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	62.31	19.21	60.12 - 64.50	70	0	95	296
Preparing for the future	37.69	19.21	35.50 - 39.88	30	5	100	296



#### Topic 4: Marketing Leadership

#### How well aligned are marketing and sales leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1= Not at all	4	1.7 %	± 1.1 %
2	11	4.6 %	± 1.8 %
3	14	5.8 %	± 2.0 %
4	29	12.1 %	± 2.9 %
5	52	21.7 %	± 3.7 %
6	77	32.1 %	± 4.3 %
7= Very Highly	53	22.1 %	± 3.7 %
Total	240	100.0 %	

Mean = 5.32

SD = 1.46

Missing Cases = 116

Response Percent = 67.4 %



#### Topic 4: Marketing Leadership

#### How well aligned are marketing and finance leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1= Not at all	5	2.1 %	± 1.2 %
2	19	7.9 %	± 2.4 %
3	22	9.2 %	± 2.5 %
4	38	15.8 %	± 3.2 %
5	50	20.8 %	± 3.6 %
6	61	25.4 %	± 3.9 %
7= Very Highly	45	18.8 %	± 3.5 %
Total	240	100.0 %	

Mean = 4.97

SD = 1.61

Missing Cases = 116

Response Percent = 67.4 %



#### Topic 4: Marketing Leadership

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

	No Change	25% more	50% more	100% more	Total
Marketing employees	118 49.8%	71 30.0%	33 13.9%	15 6.3%	237 100.0%
Marketing partnerships	158 66.7%	49 20.7%	28 11.8%	2 0.8%	237 100.0%
Segmentation & targeting	145 61.4%	56 23.7%	29 12.3%	6 2.5%	236 100.0%
Product and service design	159 67.1%	51 21.5%	21 8.9%	6 2.5%	237 100.0%
Communications	82 34.7%	75 31.8%	70 29.7%	9 3.8%	236 100.0%
Brand	93 39.4%	85 36.0%	47 19.9%	11 4.7%	236 100.0%
Training	110 46.6%	59 25.0%	41 17.4%	26 11.0%	236 100.0%



## Topic 4: Marketing Leadership

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

Minimum = -100

Maximum = 100

Mean = 8.89

Median = 0

Standard Deviation (Unbiased Estimate) = 19.63

95 Percent Confidence Interval Around the Mean = 6.30 - 11.48

Valid Cases = 221

Missing Cases = 135

Response Percent = 62.1%



#### Topic 4: Marketing Leadership

**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	45	19.4 %	± 3.5 %
2	32	13.8 %	± 3.0 %
3	32	13.8 %	± 3.0 %
4	44	19.0 %	± 3.4 %
5	43	18.5 %	± 3.4 %
6	23	9.9 %	± 2.6 %
7= Very Highly	13	5.6 %	± 2.0 %
Total	232	100.0 %	

Mean = 3.56

SD = 1.83

Missing Cases = 124

Response Percent = 65.2 %



#### Topic 4: Marketing Leadership

**Check all of the actions your company is likely to make in order to reduce the negative impact of its marketing-related activities on the ecological environment. (Check all that are likely or that your company has already taken)**

	Number	Percent	95% CI
Changing products and/or services	88	54.7 %	± 7.8 %
Changing marketing promotions	73	45.3 %	± 7.8 %
Changing partners	57	35.4 %	± 7.5 %
Changing distribution	42	26.1 %	± 6.9 %
Changing market selection	27	16.8 %	± 5.8 %
Changing brand	25	15.5 %	± 5.7 %
Total	312		

Number of Cases = 161

Number of Responses = 312

Average Number of Responses Per Case = 1.9

Number of Cases With at least one Response = 161

Response Percent = 100.0 %





#### Topic 4: Marketing Leadership

### **What factors interfere with your company doing more in the area of marketing sustainability?** **(Check all that apply)**

	Number	Percent	95% CI
The cost of such changes	87	46.8 %	± 7.2 %
Covid-19	80	43.0 %	± 7.2 %
We lack the expertise needed to make such changes	45	24.2 %	± 6.2 %
Lack of executive support	35	18.8 %	± 5.7 %
Non-Covid-19 priorities have dominated our attention	26	14.0 %	± 5.0 %
Customer resistance to such changes	26	14.0 %	± 5.0 %
It is not a good fit for our brand	22	11.8 %	± 4.7 %
Partner resistance to such changes	20	10.8 %	± 4.5 %
Total	341		

Number of Cases = 186

Number of Responses = 341

Average Number of Responses Per Case = 1.8

Number of Cases With at least one Response = 186

Response Percent = 100.0 %



**Topic 4: Marketing Leadership**

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

	Number	Percent	95% CI
Yes	64	27.7 %	± 4.0 %
No	167	72.3 %	± 5.2 %
Total	231	100.0 %	

Missing Cases = 125  
Response Percent = 64.9 %



#### Topic 4: Marketing Leadership

**Which of the following types of political activism do you think are appropriate for your brand?**  
**(Check all that you believe are appropriate)**

	Number	Percent	95% CI
Encouraging citizens to vote	158	92.9 %	± 3.9 %
Supporting a specific piece of legislation	74	43.5 %	± 7.5 %
Making changes to products and services in response to political issues	45	26.5 %	± 6.7 %
Allowing employees to speak out on political issues	44	25.9 %	± 6.7 %
Having executives to speak out on political issues	42	24.7 %	± 6.6 %
Using marketing communications to speak out on political issues	33	19.4 %	± 6.0 %
Selecting partners on the basis political stance	22	12.9 %	± 5.1 %
Supporting political campaigns	6	3.5 %	± 2.8 %
<u>Encouraging citizens to vote for a particular candidate</u>	<u>2</u>	<u>1.2 %</u>	<u>± 1.6 %</u>
Total	426		

Number of Cases = 170

Number of Responses = 426

Average Number of Responses Per Case = 2.5

Number of Cases With at least one Response = 170

Response Percent = 100.0 %



## Topic 4: Marketing Leadership

### How important do you believe it is for companies to use marketing to encourage national unity?

	Number	Percent	95% CI
1= Not at all	51	22.8 %	± 3.7 %
2	22	9.8 %	± 2.5 %
3	17	7.6 %	± 2.2 %
4	37	16.5 %	± 3.2 %
5	27	12.1 %	± 2.8 %
6	33	14.7 %	± 3.0 %
<u>7= Very Important</u>	<u>37</u>	<u>16.5 %</u>	<u>± 3.2 %</u>
Total	224	100.0 %	

Mean = 3.96

SD = 2.18

Missing Cases = 132

Response Percent = 62.9 %



#### Topic 4: Marketing Leadership

### To what extent are or were your own company's marketing activities used to encourage national unity?

	Number	Percent	95% CI
1= Not at all	128	57.4 %	± 5.0 %
2	23	10.3 %	± 2.6 %
3	17	7.6 %	± 2.2 %
4	25	11.2 %	± 2.7 %
5	16	7.2 %	± 2.2 %
6	5	2.2 %	± 1.2 %
7= A great deal	9	4.0 %	± 1.6 %
Total	223	100.0 %	

Mean = 2.23

SD = 1.75

Missing Cases = 133

Response Percent = 62.6 %



#### Topic 4: Marketing Leadership

**Check all of the marketing activities your company has engaged in for this purpose. (Check all that apply)**

	Number	Percent	95% CI
Eliminating divisive language in our marketing	53	66.3 %	± 10.6 %
Putting unity messages at the forefront of our marketing	39	48.8 %	± 11.2 %
Molding our brand Around the idea of national unity	18	22.5 %	± 9.4 %
<u>Introducing new products and services focused on unity</u>	7	8.8 %	± 6.3 %
Total	117		

Number of Cases = 80

Number of Responses = 117

Average Number of Responses Per Case = 1.5

Number of Cases With at least one Response = 80

Response Percent = 100.0 %

Asked of those who rated the extend they would use their own company's marketing activities to encourage national unity a 2 or greater.



#### Topic 4: Marketing Leadership

**Has your brand taken public action for or against any of the following social issues? (Check all that apply)**

	Number	Percent	95% CI
Covid-19 safeguards (e.g., masks, social distancing)	148	82.2 %	± 5.6 %
Racial equality	107	59.4 %	± 7.2 %
Gender equality	79	43.9 %	± 7.3 %
LGBTQ+ equality	72	40.0 %	± 7.2 %
Climate-related issues	45	25.0 %	± 6.4 %
Healthcare	42	23.3 %	± 6.2 %
Economic equality	36	20.0 %	± 5.9 %
Education	33	18.3 %	± 5.7 %
Immigration	15	8.3 %	± 4.1 %
Firearms	2	1.1 %	± 1.5 %
<u>Abortion</u>	0	0.0 %	± 0.0 %
Total	579		

Number of Cases = 180

Number of Responses = 579

Average Number of Responses Per Case = 3.2

Number of Cases With at least one Response = 180

Response Percent = 100.0 %



#### Topic 4: Marketing Leadership

**Rate the extent to which you believe your company is transparent with customers about the following topics:**

	Mean & SD	1= Not at all	2	3	4	5	6	7= Very Highly	Total
Data collection	5.74 1.51	6 2.7%	6 2.7%	7 3.1%	24 10.6%	31 13.7%	57 25.2%	95 42.0%	226 100.0%
Data usage	5.65 1.56	7 3.1%	7 3.1%	6 2.7%	28 12.4%	32 14.2%	56 24.8%	90 39.8%	226 100.0%
Partnerships to source to bring products/ services to market	5.01 1.77	11 5.0%	14 6.3%	17 7.7%	40 18.0%	35 15.8%	47 21.2%	58 26.1%	222 100.0%
Employee welfare	5.05 1.88	18 8.1%	12 5.4%	10 4.5%	38 17.1%	31 14.0%	49 22.1%	64 28.8%	222 100.0%
Environment impact	4.30 2.02	29 12.9%	28 12.5%	19 8.5%	35 15.6%	36 16.1%	38 17.0%	39 17.4%	224 100.0%
Support of social and political causes	3.37 2.14	66 30.7%	31 14.4%	16 7.4%	33 15.3%	19 8.8%	28 13.0%	22 10.2%	215 100.0%
How your company makes money	4.64 1.89	21 9.5%	18 8.1%	15 6.8%	41 18.5%	45 20.3%	35 15.8%	47 21.2%	222 100.0%





## Topic 5: 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	56.8	26.4	53.1 - 60.5	60	0	100	197
New products/services in existing markets	20.3	16.2	18.0 - 22.6	20	0	100	197
Existing products/services in new markets	14.3	13.7	12.3 - 16.2	10	0	80	197
New products/services in new markets	8.7	10.6	7.2 - 10.1	5	0	50	197



## Topic 5: 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	68.8	29.9	64.6 - 72.9	80	0	100	198
Growth from partnerships	14.6	18.6	12.0 - 17.2	10	0	100	198
Growth from acquisitions	11.6	20.3	8.8 - 14.4	0	0	100	198
Growth from licensing arrangements	5.0	11.3	3.4 - 6.6	0	0	75	198



## Topic 5: Managing Growth

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

Minimum = 39.55

Maximum = 100

Mean = 85.56

Median = 95

Standard Deviation (Unbiased Estimate) = 19.74

95 Percent Confidence Interval Around the Mean = 82.82 - 88.31

Valid Cases = 199

Missing Cases = 157

Response Percent = 55.9%



## Topic 5: Managing Growth

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

Minimum = 37.56

Maximum = 100

Mean = 82.54

Median = 90

Standard Deviation (Unbiased Estimate) = 20.55

95 Percent Confidence Interval Around the Mean = 79.69 - 85.39

Valid Cases = 200

Missing Cases = 156

Response Percent = 56.2%



## Topic 5: Managing Growth

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

Minimum = 0

Maximum = 83.37

Mean = 19.41

Median = 5

Standard Deviation (Unbiased Estimate) = 28.43

95 Percent Confidence Interval Around the Mean = 16.37 - 22.44

Valid Cases = 337

Missing Cases = 19

Response Percent = 94.7%



## Topic 6: Marketing Spending and Performance

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

Minimum = 0

Maximum = 41.26

Mean = 11.72

Median = 10

Standard Deviation (Unbiased Estimate) = 10.96

95 Percent Confidence Interval Around the Mean = 10.13 - 13.32

Valid Cases = 181

Missing Cases = 175

Response Percent = 50.8%



## Topic 6: Marketing Spending and Performance

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

Minimum = 0

Maximum = 56.58

Mean = 13.20

Median = 5

Standard Deviation (Unbiased Estimate) = 17.40

95 Percent Confidence Interval Around the Mean = 10.71 - 15.68

Valid Cases = 188

Missing Cases = 168

Response Percent = 52.8%



## Topic 6: Marketing Spending and Performance

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

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	-3.89	28.20	-7.77 - -0.01	0	-66.37	60.20	203
Digital marketing spending	11.51	33.46	6.91 - 16.11	10	-90	100	203





## Topic 6: Marketing Spending and Performance

**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	14.33	18.42	11.78 - 16.88	10	-30.66	60.45	200
Overall marketing spending	10.10	19.49	7.39 - 12.80	5	-38.05	59.65	199
Brand building	9.46	16.21	7.19 - 11.73	5	-36.97	55.74	196
Traditional advertising spending	-0.19	19.29	-2.89 - 2.51	0	-52.43	52.18	196



## Topic 6: Marketing Spending and Performance

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

Minimum = 0

Maximum = 90

Mean = 14.44

Median = 10

Standard Deviation (Unbiased Estimate) = 18.09

95 Percent Confidence Interval Around the Mean = 11.91 - 16.98

Valid Cases = 196

Missing Cases = 160

Response Percent = 55.1%



**Topic 6: Marketing Spending and Performance**

**What percent of your marketing budget was spent on initiatives related to customer experience one year ago?**

Minimum = 0

Maximum = 88

Mean = 11.87

Median = 5

Standard Deviation (Unbiased Estimate) = 17.50

95 Percent Confidence Interval Around the Mean = 9.41 - 14.33

Valid Cases = 195

Missing Cases = 161

Response Percent = 54.8%



## Topic 6: Marketing Spending and Performance

### Compared to 2019, rate your company's performance during the prior 12 months.

Sales revenue	Number	Percent	Cumulative
-75%	9	4.5 %	4.5 %
-50%	7	3.5 %	7.9 %
-40%	2	1.0 %	8.9 %
-30%	12	5.9 %	14.9 %
-20%	16	7.9 %	22.8 %
-10%	23	11.4 %	34.2 %
-7%	2	1.0 %	35.1 %
-5%	7	3.5 %	38.6 %
-3%	3	1.5 %	40.1 %
-1%	2	1.0 %	41.1 %
0	7	3.5 %	44.6 %
+1%	4	2.0 %	46.5 %
+3%	16	7.9 %	54.5 %
+5%	14	6.9 %	61.4 %
+7%	9	4.5 %	65.8 %
+10%	22	10.9 %	76.7 %
+20%	22	10.9 %	87.6 %
+30%	9	4.5 %	92.1 %
+40%	4	2.0 %	94.1 %
+50%	2	1.0 %	95.0 %
+75%	10	5.0 %	100.0 %
Total	202	100.0 %	100.0 %

Mean = 0.25

SD = 29.83

Missing Cases = 154

Response Percent = 56.7 %



## Topic 6: Marketing Spending and Performance

### Compared to 2019, rate your company's performance during the prior 12 months.

Profits	Number	Percent	Cumulative
-75%	8	4.1 %	4.1 %
-50%	5	2.6 %	6.7 %
-40%	5	2.6 %	9.2 %
-30%	9	4.6 %	13.8 %
-20%	5	2.6 %	16.4 %
-10%	18	9.2 %	25.6 %
-7%	2	1.0 %	26.7 %
-5%	7	3.6 %	30.3 %
-3%	4	2.1 %	32.3 %
-1%	3	1.5 %	33.8 %
0	24	12.3 %	46.2 %
+1%	5	2.6 %	48.7 %
+3%	11	5.6 %	54.4 %
+5%	15	7.7 %	62.1 %
+7%	4	2.1 %	64.1 %
+10%	25	12.8 %	76.9 %
+20%	17	8.7 %	85.6 %
+30%	12	6.2 %	91.8 %
+40%	3	1.5 %	93.3 %
+50%	1	0.5 %	93.8 %
+75%	12	6.2 %	100.0 %
Total	195	100.0 %	100.0 %

Mean = 2.55

SD = 29.78

Missing Cases = 161

Response Percent = 54.8 %



## Topic 6: Marketing Spending and Performance

### Compared to 2019, rate your company's performance during the prior 12 months.

Customer acquisition	Number	Percent	Cumulative
-75%	4	2.0 %	2.0 %
-50%	1	0.5 %	2.6 %
-40%	1	0.5 %	3.1 %
-30%	5	2.6 %	5.6 %
-20%	8	4.1 %	9.7 %
-10%	15	7.7 %	17.3 %
-7%	2	1.0 %	18.4 %
-5%	2	1.0 %	19.4 %
-3%	12	6.1 %	25.5 %
-1%	1	0.5 %	26.0 %
0	23	11.7 %	37.8 %
+1%	9	4.6 %	42.3 %
+3%	18	9.2 %	51.5 %
+5%	24	12.2 %	63.8 %
+7%	5	2.6 %	66.3 %
+10%	22	11.2 %	77.6 %
+20%	17	8.7 %	86.2 %
+30%	9	4.6 %	90.8 %
+40%	5	2.6 %	93.4 %
+50%	3	1.5 %	94.9 %
+75%	10	5.1 %	100.0 %
Total	196	100.0 %	100.0 %

Mean = 6.31

SD = 24.61

Missing Cases = 160

Response Percent = 55.1 %



## Topic 6: Marketing Spending and Performance

### Compared to 2019, rate your company's performance during the prior 12 months.

Customer retention	Number	Percent	Cumulative
-75%	3	1.5 %	1.5 %
-50%	0	0.0 %	1.5 %
-40%	2	1.0 %	2.6 %
-30%	5	2.6 %	5.1 %
-20%	6	3.1 %	8.2 %
-10%	4	2.0 %	10.2 %
-7%	3	1.5 %	11.7 %
-5%	12	6.1 %	17.9 %
-3%	10	5.1 %	23.0 %
-1%	6	3.1 %	26.0 %
0	55	28.1 %	54.1 %
+1%	3	1.5 %	55.6 %
+3%	13	6.6 %	62.2 %
+5%	14	7.1 %	69.4 %
+7%	2	1.0 %	70.4 %
+10%	27	13.8 %	84.2 %
+20%	10	5.1 %	89.3 %
+30%	1	0.5 %	89.8 %
+40%	3	1.5 %	91.3 %
+50%	4	2.0 %	93.4 %
+75%	13	6.6 %	100.0 %
Total	196	100.0 %	100.0 %

Mean = 6.07

SD = 24.47

Missing Cases = 160

Response Percent = 55.1 %



## Topic 6: Marketing Spending and Performance

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

	Number	Percent	95% CI
7= Excellent - one of the best in the world	21	9.9 %	± 2.5 %
6= A leader but not one of the best	48	22.5 %	± 3.6 %
5= Strong	56	26.3 %	± 3.8 %
4= Good	50	23.5 %	± 3.6 %
3= Fair	23	10.8 %	± 2.6 %
2= Weak	12	5.6 %	± 1.9 %
1= Very weak	3	1.4 %	± 1.0 %
Total	213	100.0 %	

Mean = 4.75

SD = 1.40

Missing Cases = 143

Response Percent = 59.8 %





## Topic 7: Digital, Mobile, and Social Media Marketing

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

	Number	Percent	95% CI
1= Not at all	4	1.5 %	± 1.1 %
2	12	4.5 %	± 1.9 %
3	9	3.4 %	± 1.6 %
4	34	12.8 %	± 3.1 %
5	56	21.1 %	± 3.8 %
6	64	24.2 %	± 4.0 %
7= Very Highly	86	32.5 %	± 4.5 %
Total	265	100.0 %	

Mean = 5.50

SD = 1.49

Missing Cases = 91

Response Percent = 74.4 %



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

**By what percent has the contribution of digital marketing to your company's performance changed in the last year?**

Minimum = -25

Maximum = 100

Mean = 32.67

Median = 25

Standard Deviation (Unbiased Estimate) = 29.81

95 Percent Confidence Interval Around the Mean = 29.02 - 36.32

Valid Cases = 256

Missing Cases = 100

Response Percent = 71.9%



## Topic 7: Digital, Mobile, and Social Media Marketing

**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	3	1.1 %	± 1.0 %
2	2	0.7 %	± 0.8 %
3	12	4.5 %	± 1.9 %
4	20	7.5 %	± 2.4 %
5= At industry average	48	18.0 %	± 3.6 %
6	37	13.9 %	± 3.2 %
7	54	20.2 %	± 3.8 %
8	50	18.7 %	± 3.6 %
9	22	8.2 %	± 2.5 %
10= Significantly above industry average	19	7.1 %	± 2.4 %
Total	267	100.0 %	

Mean = 6.56

SD = 1.95

Missing Cases = 89

Response Percent = 75.0 %



## Topic 7: Digital, Mobile, and Social Media Marketing

### Rate your company's digital marketing expertise level one year ago.

	Number	Percent	95% CI
1= Significantly below industry average	10	3.7 %	± 1.7 %
2	13	4.9 %	± 2.0 %
3	43	16.1 %	± 3.4 %
4	38	14.2 %	± 3.2 %
5= At industry average	46	17.2 %	± 3.5 %
6	41	15.4 %	± 3.3 %
7	36	13.5 %	± 3.2 %
8	17	6.4 %	± 2.2 %
9	14	5.2 %	± 2.0 %
10= Significantly above industry average	9	3.4 %	± 1.6 %
Total	267	100.0 %	

Mean = 5.23

SD = 2.18

Missing Cases = 89

Response Percent = 75.0 %



## Topic 7: Digital, Mobile, and Social Media Marketing

### **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
Optimization of company website	192	73.8 %	± 5.4 %
Digital media and search	169	65.0 %	± 5.8 %
Direct digital marketing (e.g., email)	149	57.3 %	± 6.1 %
Data analytics	147	56.5 %	± 6.1 %
Marketing technology systems or platforms	140	53.8 %	± 6.1 %
Online experimentation and/or A/B testing	118	45.4 %	± 6.1 %
Managing privacy issues	74	28.5 %	± 5.5 %
Machine learning and automation	53	20.4 %	± 4.9 %
Total	1042		

Number of Cases = 260

Number of Responses = 1042

Average Number of Responses Per Case = 4.0

Number of Cases With at least one Response = 260

Response Percent = 100.0 %



## Topic 7: Digital, Mobile, and Social Media 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?	18.49	20.06	15.98 - 21.00	10	0	63.52	246
% What percent will you spend on mobile in the next 12 months?	23.25	23.85	20.25 - 26.25	15	0	100	243
What percent will you spend on mobile activities in five years?	35.65	27.36	32.21 - 39.10	30	0	89.93	242



## Topic 7: Digital, Mobile, and Social Media 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	69	27.5 %	± 4.1 %
2	53	21.1 %	± 3.7 %
3	26	10.4 %	± 2.7 %
4	31	12.4 %	± 2.9 %
5	41	16.3 %	± 3.3 %
6	20	8.0 %	± 2.4 %
7= A great deal	11	4.4 %	± 1.8 %
Total	251	100.0 %	

Mean = 3.10

SD = 1.87

Missing Cases = 105

Response Percent = 70.5 %



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

**By what percent has the contribution of mobile marketing to your company's performance changed in the last year?**

Minimum = -25

Maximum = 100

Mean = 9.44

Median = 5

Standard Deviation (Unbiased Estimate) = 15.17

95 Percent Confidence Interval Around the Mean = 7.53 - 11.36

Valid Cases = 241

Missing Cases = 115

Response Percent = 67.7%





## Topic 7: Digital, Mobile, and Social Media Marketing

### 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?	14.86	13.61	13.18 - 16.54	10	252
...will you spend in the next 12 months?	17.81	13.84	16.09 - 19.53	15	250
...do you predict you will spend in five years?	24.49	16.48	22.43 - 26.55	25	246



## Topic 7: Digital, Mobile, and Social Media Marketing

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

	Number	Percent	95% CI
1= Not At All	20	7.9 %	± 2.4 %
2	48	18.9 %	± 3.6 %
3	41	16.1 %	± 3.3 %
4	47	18.5 %	± 3.5 %
5	49	19.3 %	± 3.6 %
6	30	11.8 %	± 2.9 %
7= Very Highly	19	7.5 %	± 2.4 %
Total	254	100.0 %	

Mean = 3.88

SD = 1.72

Missing Cases = 102

Response Percent = 71.3 %



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

**By what percent has the contribution of social media to your company's performance changed in the last year?**

Minimum = -50

Maximum = 100

Mean = 17.70

Median = 10

Standard Deviation (Unbiased Estimate) = 25.19

95 Percent Confidence Interval Around the Mean = 14.52 - 20.88

Valid Cases = 241

Missing Cases = 115

Response Percent = 67.7%



## Topic 8: Marketing Jobs

### What percent of marketing jobs in your company were lost during the last year?

Minimum = 0

Maximum = 100

Mean = 8.16

Median = 0

Standard Deviation (Unbiased Estimate) = 16.50

95 Percent Confidence Interval Around the Mean = 6.26 - 10.06

Valid Cases = 289

Missing Cases = 67

Response Percent = 81.2%



## Topic 8: Marketing Jobs

### What percent of these lost marketing jobs were senior manager roles?\*

Minimum = 0

Maximum = 100

Mean = 28.07

Median = 10

Standard Deviation (Unbiased Estimate) = 35.66

95 Percent Confidence Interval Around the Mean = 21.32 - 34.83

Valid Cases = 107

Missing Cases = 0

Response Percent = 100.0%

\*Asked only of respondents who reported marketing jobs lost last year.



## Topic 8: Marketing Jobs

### **Considering all marketing job losses in your company (not just senior managers), when do you anticipate these marketing jobs returning to 2019 levels?\***

	Number	Percent	95% CI
1 month	5	4.7 %	± 4.1 %
2-3 months	5	4.7 %	± 4.1 %
4-6 months	9	8.4 %	± 5.4 %
6-12 months	19	17.8 %	± 7.4 %
1-2 years	43	40.2 %	± 9.4 %
3+ years	12	11.2 %	± 6.1 %
Never	14	13.1 %	± 6.5 %
Total	107	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

\*Asked only of respondents who reported marketing jobs lost last year.



## Topic 8: Marketing Jobs

### What percent of marketing jobs in your company were added during the last year?

Minimum = 0

Maximum = 100

Mean = 9.12

Median = 0

Standard Deviation (Unbiased Estimate) = 19.30

95 Percent Confidence Interval Around the Mean = 6.88 - 11.36

Valid Cases = 285

Missing Cases = 71

Response Percent = 80.1%



## Topic 8: Marketing Jobs

### What percent of these added marketing jobs were senior manager roles?\*

Minimum = 0

Maximum = 100

Mean = 17.68

Median = 1

Standard Deviation (Unbiased Estimate) = 29.53

95 Percent Confidence Interval Around the Mean = 12.46 - 22.90

Valid Cases = 123

Missing Cases = 1

Response Percent = 99.2%

\*Asked only of respondents who reported marketing jobs added last year.





## Topic 8: Marketing Jobs

### **Considering all marketing job additions in your company (not just senior managers), when do you anticipate these jobs returning to 2019 levels?\***

	Number	Percent	95% CI
1 month	10	8.8 %	± 4.9 %
2-3 months	4	3.5 %	± 3.2 %
4-6 months	11	9.6 %	± 5.1 %
6-12 months	14	12.3 %	± 5.7 %
1-2 years	24	21.1 %	± 7.1 %
3+ years	7	6.1 %	± 4.1 %
Never	44	38.6 %	± 8.6 %
Total	114	100.0 %	

Missing Cases = 10

Response Percent = 91.9 %

\*Asked only of respondents who reported marketing jobs added last year.



## Topic 8: Marketing Jobs

### Net Job Change = % Jobs Added - % Jobs Lost

Minimum = -100

Maximum = 100

Mean = 0.91

Median = 0

Standard Deviation (Unbiased Estimate) = 27.13

95 Percent Confidence Interval Around the Mean = -2.24 - 4.06

Valid Cases = 285

Missing Cases = 71

Response Percent = 80.1%



## Topic 8: Marketing Jobs

### **By what percentage will your firm's marketing hires change in the next year?**

Minimum = -35.84

Maximum = 51.48

Mean = 7.59

Median = 0.50

Standard Deviation (Unbiased Estimate) = 16.31

95 Percent Confidence Interval Around the Mean = 5.69 - 9.49

Valid Cases = 283

Missing Cases = 73

Response Percent = 79.5%



## Topic 9: 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	117	48.8 %	± 4.9 %
We have a good qualitative sense of the impact, but not a quantitative impact	92	38.3 %	± 4.6 %
We haven't been able to show the impact yet	31	12.9 %	± 2.9 %
Total	240	100.0 %	

Missing Cases = 116

Response Percent = 67.4 %



## Topic 9: 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= Regularly	Total
Currently	2.30 1.66	122 49.8%	37 15.1%	28 11.4%	24 9.8%	23 9.4%	4 1.6%	7 2.9%	245 100.0%
Next three years	4.08 2.05	37 14.1%	33 12.5%	43 16.3%	36 13.7%	35 13.3%	30 11.4%	49 18.6%	263 100.0%



## Topic 9: Marketing Analytics

**How, if at all, has this investment in AI and machine learning influenced how much time your marketers are able to spend on non-routine and more strategic projects in your company?**

	Number	Percent	95% CI
1= No impact	122	49.6 %	± 5.0 %
2	37	15.0 %	± 3.2 %
3	18	7.3 %	± 2.3 %
4	32	13.0 %	± 3.0 %
5	24	9.8 %	± 2.6 %
6	8	3.3 %	± 1.6 %
7= A great deal	5	2.0 %	± 1.2 %
Total	246	100.0 %	

Mean = 2.36

SD = 1.70

Missing Cases = 110

Response Percent = 69.1 %



**Topic 10: The CMO Survey Award for Marketing Excellence**

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

Apple Inc.



**Topic 10: The CMO Survey Award for Marketing Excellence**

**Which company across all industries sets the standard for excellence in marketing?**

**Industry-specific Winners**

***Technology***

- Amazon
- Microsoft
- Adobe

***Consumer Goods***

- Proctor & Gamble
- Nike

***Financial Services***

- Geico





## Appendix: Firm-level Descriptive Information

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

	Number	Percent	95% CI
B2B - Product	131	37.1 %	± 5.0 %
B2B - Services	97	27.5 %	± 4.6 %
B2C - Product	72	20.4 %	± 4.2 %
B2C - Services	53	15.0 %	± 3.7 %
Total	353	100.0 %	

Missing Cases = 3

Response Percent = 99.2 %



## Appendix: Firm-level Descriptive Information

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

	Number	Percent	95% CI
Technology [Software/Platform]	66	18.8 %	± 4.1 %
Manufacturing	46	13.1 %	± 3.5 %
Consumer Packaged Goods	41	11.6 %	± 3.3 %
Professional Services/Consulting	37	10.5 %	± 3.2 %
Healthcare	27	7.7 %	± 2.8 %
Banking/Finance/Insurance	26	7.4 %	± 2.7 %
Retail	24	6.8 %	± 2.6 %
Communications/Media	17	4.8 %	± 2.2 %
Education	16	4.5 %	± 2.2 %
Consumer Services	11	3.1 %	± 1.8 %
Transportation	10	2.8 %	± 1.7 %
Energy	8	2.3 %	± 1.5 %
Wholesale	8	2.3 %	± 1.5 %
Pharmaceuticals / Biotech	6	1.7 %	± 1.3 %
Mining/Construction	6	1.7 %	± 1.3 %
Real Estate	3	0.9 %	± 1.0 %
Total	352	100.0 %	

Missing Cases = 4

Response Percent = 98.9 %



## Appendix: Firm-level Descriptive Information

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

	Number	Percent	95% CI
Fewer than 50	70	19.7 %	± 4.2 %
50-99	33	9.3 %	± 3.0 %
100-499	76	21.4 %	± 4.3 %
500-999	38	10.7 %	± 3.2 %
1,000-2,499	24	6.8 %	± 2.6 %
2,500-4,999	22	6.2 %	± 2.5 %
5,000-9,999	20	5.6 %	± 2.4 %
<u>More than 10,000</u>	<u>72</u>	<u>20.3 %</u>	<u>± 4.2 %</u>
Total	355	100.0 %	

Missing Cases = 1

Response Percent = 99.7 %



## Appendix: Firm-level Descriptive Information

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

	Number	Percent	Cumulative
Less than \$10 million	74	21.7 %	21.7 %
\$10-25 million	35	10.3 %	32.0 %
\$26-99 million	44	12.9 %	44.9 %
\$100-499 million	68	19.9 %	64.8 %
\$500-999 million	13	3.8 %	68.6 %
\$1-2.5 billion	26	7.6 %	76.2 %
\$2.6-5 billion	19	5.6 %	81.8 %
\$5.1-9.9 billion	19	5.6 %	87.4 %
\$10-49 billion	32	9.4 %	96.8 %
<u>More than \$50+ billion</u>	11	3.2 %	100.0 %
Total	341	100.0 %	100.0 %

Missing Cases = 15

Response Percent = 95.8 %