

TOPLINE RESULTS

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Survey Partners



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Topic 1: Marketplace Dynamics - Overall Economy and Company**Are you more or less optimistic about the U.S. economy compared to last quarter?**

| | Number | Percent | 95% CI |
|-------------|--------|---------|---------|
| 3=More | 153 | 29.0 % | ± 3.9 % |
| 2=No Change | 186 | 35.2 % | ± 4.1 % |
| 1=Less | 189 | 35.8 % | ± 4.1 % |
| Total | 528 | 100.0 % | |

Mean = 1.9

SD = 0.8

Missing Cases = 3

Response Percent = 99.4 %

Topic 1: Marketplace Dynamics - Overall Economy and Company

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

Minimum = 6

Maximum = 100

Mean = 58.4

Median = 60

Standard Deviation (Unbiased) = 16.7

95 Percent Confidence Interval Around The Mean = 56.9 - 59.8

Quartiles

1 = 50

2 = 60

3 = 70

Valid Cases = 513

Missing Cases = 18

Response Percent = 96.6%

Topic 1: Marketplace Dynamics - Overall Economy and Company**Are you more or less optimistic about your own company compared to last quarter?**

| | Number | Percent | 95% CI |
|-------------|--------|---------|---------|
| 3=More | 250 | 47.8 % | ± 4.3 % |
| 2=No Change | 143 | 27.3 % | ± 3.8 % |
| 1=Less | 130 | 24.9 % | ± 3.7 % |
| Total | 523 | 100.0 % | |

Mean = 2.2

SD = 0.8

Missing Cases = 8

Response Percent = 98.5 %

Topic 1: Marketplace Dynamics - Overall Economy and Company

Rate your optimism about your company on a scale from 0-100 with 0 being the least optimistic.

Minimum = 1

Maximum = 100

Mean = 69.6

Median = 75

Standard Deviation (Unbiased) = 19.3

95 Percent Confidence Interval Around The Mean = 67.9 - 71.2

Quartiles

1 = 60

2 = 75

3 = 85

Valid Cases = 523

Missing Cases = 8

Response Percent = 98.5%

Topic 1: Marketplace Dynamics - Customers**Are you more or less optimistic about your prospects for revenue growth compared to the prior 12 months?**

| | Number | Percent | 95% CI |
|-------------|--------|---------|---------|
| 3=More | 274 | 51.9 % | ± 4.3 % |
| 2=No Change | 112 | 21.2 % | ± 3.5 % |
| 1=Less | 142 | 26.9 % | ± 3.8 % |
| Total | 528 | 100.0 % | |

Mean = 2.3

SD = 0.9

Missing Cases = 3

Response Percent = 99.4 %

Topic 1: Marketplace Dynamics - Customers

Rate your optimism about your prospects for sales revenue growth on a scale from 0-100 with 0 being the least optimistic.

Minimum = 0

Maximum = 100

Mean = 66.0

Median = 70

Standard Deviation (Unbiased) = 20.7

95 Percent Confidence Interval Around The Mean = 64.2 - 67.7

Quartiles

1 = 50

2 = 70

3 = 80

Valid Cases = 526

Missing Cases = 5

Response Percent = 99.1%

Topic 1: Marketplace Dynamics - Customers

Focusing on this market, do you expect the following customer outcomes in the next 12 months?

(N=531)

| | Mean & SD | More 3 | No Change 2 | Less 1 | Total |
|--|------------|--------------|----------------|--------------|---------------|
| Customer will buy related products/ services from my firm | 2.4 0.6 | 279 52.9% | 202 38.3% | 46 8.7% | 527 100.0% |
| Customer's purchase volume | 2.4 0.8 | 296 56.1% | 123 23.3% | 109 20.6% | 528 100.0% |
| My firm's ability to retain current customers | 2.3 0.7 | 240 45.4% | 226 42.7% | 63 11.9% | 529 100.0% |
| The entry of new customers into this market | 2.2 0.7 | 226 43.0% | 204 38.9% | 95 18.1% | 525 100.0% |
| Customer's price per unit | 2.0 0.7 | 160 30.4% | 233 44.2% | 134 25.4% | 527 100.0% |

Topic 1: Marketplace Dynamics - Customers

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

(N=531)

| | 1st Priority | 2nd Priority | 3rd Priority | Total |
|--------------------------|--------------|--------------|--------------|--------------|
| Low Price | 123 23.2% | 90 16.9% | 72 13.6% | 285 53.7% |
| Superior Product Quality | 131 24.7% | 112 21.1% | 91 17.1% | 334 62.9% |
| Superior Innovation | 50 9.4% | 50 9.4% | 66 12.4% | 166 31.3% |
| Excellent Service | 100 18.8% | 155 29.2% | 132 24.9% | 387 72.9% |
| Trusting Relationship | 92 17.3% | 99 18.6% | 107 20.2% | 298 56.1% |
| Brand | 36 6.8% | 26 4.9% | 63 11.9% | 125 23.5% |

Topic 1: Marketplace Dynamics - Competitors

Predict the likelihood of the following competitor interactions over the next 12 months.

(N=531)

| | Mean & SD | Not Likely 1 | 2 | 3 | 4 | 5 | 6 | Very Likely 7 | Total |
|--|------------|--------------------|--------------|-------------|--------------|--------------|--------------|---------------------|--------------|
| More intense rivalry for customers | 5.4 1.4 | 9 1.7% | 19 3.6% | 29 5.5% | 67 12.6% | 117 22.0% | 163 30.7% | 125 23.5% | 529 99.6% |
| More competitor price-cutting | 4.9 1.7 | 18 3.4% | 46 8.7% | 42 7.9% | 66 12.4% | 125 23.5% | 133 25.0% | 99 18.6% | 529 99.6% |
| More competitor innovation | 4.7 1.5 | 12 2.3% | 34 6.4% | 66 12.4% | 109 20.5% | 132 24.9% | 118 22.2% | 55 10.4% | 526 99.1% |
| More cooperation on non-price strategies | 3.8 1.5 | 48 9.0% | 70 13.2% | 79 14.9% | 168 31.6% | 86 16.2% | 49 9.2% | 22 4.1% | 522 98.3% |
| Emergence of new domestic competitors | 3.5 2.0 | 106 20.0% | 112 21.1% | 68 12.8% | 47 8.9% | 79 14.9% | 67 12.6% | 51 9.6% | 530 99.8% |
| Emergence of new global competitors | 3.4 2.0 | 113 21.3% | 108 20.3% | 65 12.2% | 70 13.2% | 78 14.7% | 51 9.6% | 44 8.3% | 529 99.6% |

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

| | Number | Percent | 95% CI |
|-------------------------------|--------|---------|---------|
| Uses channel partners | 369 | 69.5 % | ± 3.9 % |
| Does not use channel partners | 162 | 30.5 % | ± 3.9 % |
| Total | 531 | 100.0 % | |

Missing Cases = 0

Response Percent = 100.0 %

Topic 1: Marketplace Dynamics - Channel Partners

Focusing on your firm's channel partnerships in this market, are you more or less optimistic about your prospects for revenue growth compared to prior 12 months?

| | Number | Percent | 95% CI |
|-------------|--------|---------|---------|
| 3=More | 147 | 42.6 % | ± 5.0 % |
| 2=No Change | 132 | 38.3 % | ± 4.9 % |
| 1=Less | 66 | 19.1 % | ± 3.9 % |
| Total | 345 | 100.0 % | |

Mean = 2.2

SD = 0.8

Missing Cases = 24

Response Percent = 93.5 %

Topic 1: Marketplace Dynamics - Channel Partners

Do you expect the following channel partner outcomes for your firm to increase, decrease, or have no change in the next 12 months?

(N=369)

| | Mean & SD | Increase 3 | No Change 2 | Decrease 1 | Total |
|---|------------|---------------|----------------|---------------|---------------|
| Partner's purchase volume | 2.2 0.7 | 133 38.6% | 161 46.7% | 51 14.8% | 345 100.0% |
| Partner will buy related products and services | 2.2 0.6 | 105 30.4% | 216 62.6% | 24 7.0% | 345 100.0% |
| My firm will sell directly to end customers, not through channel partners | 2.2 0.5 | 89 25.9% | 234 68.0% | 21 6.1% | 344 100.0% |
| Partner's level of power in our relationship | 2.0 0.6 | 76 22.0% | 209 60.4% | 61 17.6% | 346 100.0% |
| Partner's price per unit | 2.0 0.6 | 74 21.4% | 201 58.1% | 71 20.5% | 346 100.0% |

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 or services in existing markets | 51.7 | 26.5 | 49.1 - 54.4 | 50 | 0 | 100 | 384 |
| Existing products or services in new markets | 15.7 | 13.8 | 14.4 - 17.1 | 15 | 0 | 90 | 384 |
| New products or services in existing markets | 22.8 | 18.4 | 21.0 - 24.7 | 20 | 0 | 100 | 384 |
| New products or services in new markets | 9.7 | 12.8 | 8.4 - 11.0 | 5 | 0 | 100 | 384 |

Topic 2: Firm Growth Strategies

Allocate 100 points to reflect your firm's spending in each of the four growth strategies during the next 12 months

| | Mean | SD | 95% CI | Median | Minimum | Maximum | Total |
|---|------|------|-------------|--------|---------|---------|-------|
| Existing products or services in existing markets | 45.7 | 24.6 | 43.2 - 48.2 | 50 | 0 | 100 | 378 |
| Existing products or services in new markets | 18.1 | 15.0 | 16.6 - 19.6 | 20 | 0 | 80 | 378 |
| New products or services in existing markets | 25.0 | 17.2 | 23.3 - 26.8 | 25 | 0 | 100 | 378 |
| New products or services in new markets | 11.2 | 13.2 | 9.9 - 12.5 | 10 | 0 | 100 | 378 |

Topic 2: Firm Growth Strategies

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

| | Mean | SD | 95% CI | Median | Minimum | Maximum | Total |
|------------------------------------|------|------|-------------|--------|---------|---------|-------|
| Growth from your firm internally | 68.9 | 28.7 | 66.0 - 71.7 | 75 | 0 | 100 | 390 |
| Growth from acquisitions | 12.2 | 18.3 | 10.3 - 14.0 | 0 | 0 | 100 | 390 |
| Growth from partnerships | 12.9 | 16.5 | 11.3 - 14.5 | 10 | 0 | 100 | 390 |
| Growth from licensing arrangements | 6.1 | 14.0 | 4.7 - 7.5 | 0 | 0 | 100 | 390 |

Topic 2: Firm Growth Strategies

Which international market is your highest revenue growth market?

| | Number | Percent | 95% CI |
|----------------|--------|---------|---------|
| Canada | 79 | 24.2 % | ± 3.0 % |
| China | 70 | 21.5 % | ± 2.9 % |
| Western Europe | 53 | 16.3 % | ± 2.6 % |
| Brazil | 15 | 4.6 % | ± 1.4 % |
| Middle East | 13 | 4.0 % | ± 1.3 % |
| Mexico | 7 | 2.1 % | ± 1.0 % |
| Japan | 6 | 1.8 % | ± 0.9 % |
| Eastern Europe | 6 | 1.8 % | ± 0.9 % |
| India | 6 | 1.8 % | ± 0.9 % |
| Korea | 2 | 0.6 % | ± 0.5 % |
| Russia | 2 | 0.6 % | ± 0.5 % |
| Other | 67 | 20.6 % | ± 2.8 % |
| Total | 326 | 100.0 % | |

Missing Cases = 205

Response Percent = 61.4 %

Topic 2: Firm Growth Strategies

Considering this international market, by what percent did your sales revenue increase in the last 12 months?

| | Mean | SD | N | Pct. |
|--------------------------------------|------|-------|-----|--------|
| For Entire Sample | 23.7 | 74.6 | 316 | 100.0% |
| <u>Highest revenue growth market</u> | | | | |
| Canada | 10.7 | 13.3 | 76 | 25.9% |
| Mexico | 12.5 | 7.3 | 6 | 2.0% |
| China | 51.5 | 140.8 | 60 | 20.4% |
| Japan | 16.3 | 18.6 | 6 | 2.0% |
| Korea | 75.0 | 106.1 | 2 | 0.7% |
| India | 26.2 | 36.9 | 6 | 2.0% |
| Russia | 20.0 | 0.0 | 1 | 0.3% |
| Eastern Europe | 13.4 | 15.4 | 5 | 1.7% |
| Western Europe | 29.0 | 77.6 | 46 | 15.6% |
| Brazil | 49.7 | 63.2 | 12 | 4.1% |
| Middle East | 38.4 | 79.1 | 13 | 4.4% |
| Other | 9.4 | 31.0 | 61 | 20.7% |

Topic 2: Firm Growth Strategies

What percentage of your firm's sales is domestic? Through the internet?

| | Mean | SD | 95% CI | Median | Minimum | Maximum | Total |
|--|------|------|-------------|--------|---------|---------|-------|
| What % of your firm's sales is domestic? | 80.4 | 23.9 | 78.0 - 82.9 | 90 | 0 | 100 | 363 |
| What % of your firm's sales is through the Internet? | 11.6 | 24.0 | 9.1 - 14.1 | 0 | 0 | 100 | 357 |

Topic 3: Marketing Spending

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

| | Mean | SD | 95% CI | Median | Minimum | Maximum | Total |
|--|------|------|------------|--------|---------|---------|-------|
| Overall marketing spending | 6.4 | 19.0 | 4.1 - 8.8 | 5 | -60 | 100 | 255 |
| Internet marketing spending | 11.5 | 22.8 | 8.5 - 14.5 | 5 | -50 | 200 | 216 |
| Traditional advertising spending | -1.9 | 20.4 | -4.6 - 0.9 | 0 | -100 | 100 | 211 |
| Brand building | 7.5 | 26.5 | 3.8 - 11.1 | 5 | -100 | 300 | 205 |
| Customer relationship management | 9.0 | 16.3 | 6.7 - 11.2 | 5 | -20 | 100 | 200 |
| New product introductions | 9.4 | 17.3 | 7.0 - 11.8 | 5 | -75 | 100 | 201 |
| New service introductions | 6.4 | 10.2 | 4.8 - 7.9 | 2 | 0 | 50 | 173 |
| Marketing (non-sales) hires | 6.6 | 18.7 | 4.0 - 9.1 | 0 | -30 | 100 | 204 |
| Integrating what we know about marketing | 8.2 | 17.0 | 5.6 - 10.8 | 2 | -10 | 100 | 167 |
| Developing knowledge about how to do marketing | 5.8 | 14.4 | 3.6 - 7.9 | 0 | -20 | 100 | 172 |
| Marketing training | 7.2 | 33.0 | 2.3 - 12.2 | 0 | -20 | 400 | 171 |
| Marketing research and intelligence | 8.2 | 27.4 | 4.3 - 12.0 | 3 | -100 | 300 | 197 |
| Marketing consulting services | 3.3 | 16.7 | 0.8 - 5.8 | 0 | -100 | 100 | 172 |

Topic 3: Marketing Spending

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

(N=531)

| | Mean & SD | Positive 1 | Zero 0 | Negative -1 | Total |
|--|------------|---------------|-------------|----------------|---------------|
| Overall marketing spending | 0.5 0.8 | 176 69.0% | 33 12.9% | 46 18.0% | 255 100.0% |
| Internet marketing spending | 0.7 0.6 | 156 72.2% | 45 20.8% | 15 6.9% | 216 100.0% |
| Traditional advertising spending | 0.0 0.8 | 71 33.6% | 62 29.4% | 78 37.0% | 211 100.0% |
| Brand building | 0.6 0.6 | 136 66.3% | 56 27.3% | 13 6.3% | 205 100.0% |
| Customer relationship management | 0.7 0.5 | 143 71.5% | 53 26.5% | 4 2.0% | 200 100.0% |
| New product introductions | 0.7 0.5 | 144 71.6% | 54 26.9% | 3 1.5% | 201 100.0% |
| New service introductions | 0.6 0.5 | 103 59.5% | 70 40.5% | 0 0.0% | 173 100.0% |
| Marketing (non-sales) hires | 0.4 0.6 | 99 48.5% | 90 44.1% | 15 7.4% | 204 100.0% |
| Integrating what we know about marketing | 0.6 0.5 | 100 59.9% | 65 38.9% | 2 1.2% | 167 100.0% |
| Developing knowledge about how to do marketing | 0.5 0.6 | 85 49.4% | 81 47.1% | 6 3.5% | 172 100.0% |
| Marketing training | 0.4 0.6 | 83 48.5% | 79 46.2% | 9 5.3% | 171 100.0% |
| Marketing research and intelligence | 0.6 0.6 | 128 65.0% | 59 29.9% | 10 5.1% | 197 100.0% |
| Marketing consulting services | 0.2 0.7 | 63 36.6% | 87 50.6% | 22 12.8% | 172 100.0% |

Topic 3: Marketing Spending

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

Percent of budget

Minimum = 0

Maximum = 75

Mean = 11.4

Median = 6

Standard Deviation (Unbiased) = 13.3

95 Percent Confidence Interval Around The Mean = 9.7 - 13.0

Quartiles

1 = 3

2 = 6

3 = 15

Valid Cases = 250

Missing Cases = 281

Response Percent = 47.1%

Topic 3: Marketing Spending

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

Percent of revenues

Minimum = 0

Maximum = 100

Mean = 11.9

Median = 4

Standard Deviation (Unbiased) = 20.8

95 Percent Confidence Interval Around The Mean = 9.3 - 14.4

Quartiles

1 = 1

2 = 4

3 = 10

Valid Cases =254

Missing Cases =277

Response Percent = 47.8%

Topic 4: Financial and Marketing Performance

Rate your firm's performance during the last 12 months

(N=531)

| | Mean & SD | -10% | -7% | -5% | -3% | -1% | 0 | +1% | +3% | +5% | +7% | +10% | Total |
|----------------------|------------|------------|-----------|------------|------------|------------|-------------|-------------|-------------|-------------|------------|--------------|---------------|
| Market share | 2.7 4.5 | 7 2.4% | 1 0.3% | 12 4.1% | 10 3.4% | 16 5.5% | 40 13.7% | 46 15.8% | 55 18.9% | 44 15.1% | 16 5.5% | 44 15.1% | 291 100.0% |
| Sales Revenue | 4.0 6.0 | 21 6.8% | 2 0.6% | 18 5.8% | 7 2.3% | 9 2.9% | 21 6.8% | 18 5.8% | 46 14.9% | 34 11.0% | 25 8.1% | 107 34.7% | 308 100.0% |
| Marketing ROI | 3.2 4.6 | 6 2.4% | 2 0.8% | 7 2.7% | 7 2.7% | 7 2.7% | 48 18.8% | 28 11.0% | 48 18.8% | 43 16.9% | 8 3.1% | 51 20.0% | 255 100.0% |
| Profits | 3.3 5.6 | 17 5.9% | 5 1.7% | 11 3.8% | 10 3.4% | 5 1.7% | 25 8.6% | 37 12.8% | 43 14.8% | 43 14.8% | 22 7.6% | 72 24.8% | 290 100.0% |
| Customer acquisition | 3.3 4.1 | 3 1.1% | 1 0.4% | 7 2.5% | 11 3.9% | 8 2.8% | 35 12.4% | 48 17.0% | 49 17.4% | 60 21.3% | 13 4.6% | 47 16.7% | 282 100.0% |
| Customer retention | 2.0 4.5 | 7 2.5% | 3 1.1% | 9 3.2% | 18 6.4% | 17 6.0% | 73 26.0% | 32 11.4% | 38 13.5% | 37 13.2% | 10 3.6% | 37 13.2% | 281 100.0% |
| Brand value | 3.4 4.4 | 5 2.0% | 1 0.4% | 3 1.2% | 7 2.8% | 5 2.0% | 52 21.0% | 32 12.9% | 34 13.7% | 49 19.8% | 11 4.4% | 49 19.8% | 248 100.0% |

Topic 4: Financial and Marketing Performance

What is your firm's goal for the next 12 months?

(N=531)

| | Mean & SD | -10% | -7% | -5% | -3% | -1% | 0 | +1% | +3% | +5% | +7% | +10% | Total |
|----------------------|--------------|-----------|-----------|-----------|-----------|-----------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| Market share | 5.0 3.6 | 0 0.0% | 1 0.4% | 1 0.4% | 3 1.1% | 3 1.1% | 17 6.0% | 34 12.1% | 57 20.3% | 67 23.8% | 26 9.3% | 72 25.6% | 281 100.0% |
| Sales Revenue | 6.8 3.7 | 2 0.7% | 0 0.0% | 4 1.3% | 0 0.0% | 2 0.7% | 8 2.6% | 12 3.9% | 35 11.5% | 57 18.8% | 42 13.8% | 142 46.7% | 304 100.0% |
| Marketing ROI | 5.4 3.7 | 1 0.4% | 1 0.4% | 1 0.4% | 1 0.4% | 0 0.0% | 20 8.1% | 21 8.5% | 44 17.7% | 58 23.4% | 30 12.1% | 71 28.6% | 248 100.0% |
| Profits | 6.0 3.9 | 3 1.1% | 0 0.0% | 1 0.4% | 2 0.7% | 2 0.7% | 12 4.2% | 20 7.0% | 40 14.1% | 66 23.2% | 30 10.6% | 108 38.0% | 284 100.0% |
| Customer acquisition | 5.8 3.6 | 0 0.0% | 0 0.0% | 0 0.0% | 2 0.7% | 3 1.1% | 17 6.2% | 22 8.1% | 49 17.9% | 60 22.0% | 27 9.9% | 93 34.1% | 273 100.0% |
| Customer retention | 4.8 4.1 | 1 0.4% | 0 0.0% | 3 1.1% | 4 1.5% | 2 0.7% | 36 13.1% | 34 12.4% | 48 17.5% | 46 16.8% | 21 7.7% | 79 28.8% | 274 100.0% |
| Brand value | 5.8 3.8 | 0 0.0% | 0 0.0% | 1 0.4% | 0 0.0% | 0 0.0% | 25 10.4% | 22 9.1% | 38 15.8% | 46 19.1% | 19 7.9% | 90 37.3% | 241 100.0% |

Topic 4: Financial and Marketing Performance

How would you rate your company's marketing excellence?

| | Number | Percent | 95% CI |
|--|--------|---------|---------|
| 7=Excellent - one of the best in the world | 17 | 4.8 % | ± 1.5 % |
| 6=A leader but not one of the best | 62 | 17.5 % | ± 2.7 % |
| 5=Strong | 105 | 29.7 % | ± 3.4 % |
| 4=Good | 82 | 23.2 % | ± 3.1 % |
| 3=Fair | 51 | 14.4 % | ± 2.5 % |
| 2=Weak | 30 | 8.5 % | ± 2.0 % |
| 1=Very weak | 7 | 2.0 % | ± 1.0 % |
| Total | 354 | 100.0 % | |

Mean = 4.4

SD = 1.4

Missing Cases = 177

Response Percent = 66.7 %

Topic 5: Social Media

What percent of your marketing budget do you spend on social media?

| | Mean | SD | 95% CI | Median | Total |
|---|------|------|-------------|--------|-------|
| What percent of your marketing budget do you currently spend on social media? | 7.6 | 10.9 | 6.4 - 8.8 | 5 | 314 |
| What percent will you spend in the next 12 months? | 10.7 | 13.0 | 9.2 - 12.1 | 7 | 314 |
| What percent do you predict you will spend in five years? | 18.8 | 24.6 | 16.1 - 21.5 | 15 | 312 |

Topic 5: Social Media

In-house vs. outsourcing of social media activities?

| | Mean | SD | 95% CI | Median | Total |
|---|------|------|-------------|--------|-------|
| How many of people does your firm employ in-house to do social media? | 3.6 | 28.1 | 0.5 - 6.7 | 1 | 318 |
| What percentage of these social media employees are within marketing? | 60.2 | 46.4 | 55.0 - 65.4 | 100 | 305 |
| How many of people does your firm employ from other companies to perform social media activities? | 2.0 | 6.3 | 1.3 - 2.7 | 0 | 304 |

Topic 5: Social Media

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

| | Number | Percent | Cumulative |
|--------------------------|--------|---------|------------|
| 7=Very Effectively | 22 | 6.8 % | 6.8 % |
| 6= | 43 | 13.3 % | 20.1 % |
| 5= | 72 | 22.2 % | 42.3 % |
| 4= | 45 | 13.9 % | 56.2 % |
| 3= | 45 | 13.9 % | 70.1 % |
| 2= | 43 | 13.3 % | 83.3 % |
| 1=Not At All Effectively | 54 | 16.7 % | 100.0 % |
| Total | 324 | 100.0 % | 100.0 % |

Mean = 3.8

SD = 1.9

Missing Cases = 207

Response Percent = 61.0 %

Topic 5: Social Media

How effectively does your company integrate customer information across the following channels:

(N=531)

| | Mean & SD | Not At All Effectively | | | | | Very Effectively | | | Total |
|--|------------|------------------------|-------------|-------------|-------------|-------------|------------------|-----------|---------------|-------|
| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | |
| Across all purchasing channels | 3.9 1.6 | 25 7.9% | 42 13.2% | 61 19.2% | 61 19.2% | 78 24.6% | 41 12.9% | 9 2.8% | 317 100.0% | |
| Across all communication and social media channels | 3.7 1.6 | 39 12.4% | 43 13.7% | 56 17.8% | 69 21.9% | 71 22.5% | 29 9.2% | 8 2.5% | 315 100.0% | |
| Across purchasing, communication and social media channels | 3.5 1.5 | 40 12.7% | 50 15.9% | 62 19.7% | 78 24.8% | 58 18.4% | 22 7.0% | 5 1.6% | 315 100.0% | |

Topic 6: 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?

Percent change

Minimum = -99

Maximum = 200

Mean = 6.5

Median = 0

Standard Deviation (Unbiased) = 23.1

95 Percent Confidence Interval Around The Mean = 3.7 - 9.2

Quartiles

1 = 0

2 = 0

3 = 5

Valid Cases = 276

Missing Cases = 255

Response Percent = 52.0%

Topic 6: Marketing Jobs

By what percentage will your firm's outsourcing of marketing activities change in the next year?

Percent change

Minimum = -50

Maximum = 99

Mean = 3.1

Median = 0

Standard Deviation (Unbiased) = 13.0

95 Percent Confidence Interval Around The Mean = 1.6 - 4.7

Quartiles

1 = 0

2 = 0

3 = 5

Valid Cases =275

Missing Cases =256

Response Percent = 51.8%

Topic 7: Marketing Organization

Where is marketing located in your firm?

| | Number | Percent | 95% CI |
|------------------------|--------|---------|---------|
| Corporate | 239 | 79.7 % | ± 4.6 % |
| Business unit level | 115 | 38.3 % | ± 5.5 % |
| Brand or product level | 52 | 17.3 % | ± 4.3 % |
| Field offices | 28 | 9.3 % | ± 3.3 % |
| Total | 434 | | |

Number of Cases = 300

Number of Responses = 434

Average Number Of Responses Per Case = 1.4

Number Of Cases With At Least One Response = 300

Response Percent = 100.0 %

Topic 7: Marketing Organization

How many employees does your firm have?

| | Median | Mean | SD | Minimum | Maximum | Range | Total |
|--|--------|-------|-------|---------|---------|--------|-------|
| How many employees does your firm have? | 325 | 11051 | 39643 | 1 | 400000 | 399999 | 294 |
| How many marketing (non-sales) employees are in your firm? | 10 | 163 | 819 | 0 | 10000 | 10000 | 285 |

Topic 7: Marketing Organization

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

| | Number | Percent | 95% CI |
|---|--------|---------|---------|
| Sales is in charge of marketing | 48 | 13.0 % | ± 2.5 % |
| Sales is within the marketing function | 38 | 10.3 % | ± 2.2 % |
| Sales and marketing work together on an equal level | 256 | 69.2 % | ± 4.3 % |
| We don't have a sales function | 21 | 5.7 % | ± 1.7 % |
| <u>We have a sales function, but not a marketing function</u> | 7 | 1.9 % | ± 1.0 % |
| Total | 370 | 100.0 % | |

Missing Cases = 161

Response Percent = 69.7 %

Topic 8: Marketing Leadership

What is marketing primarily responsible for in your firm?

| | Number | Percent | 95% CI |
|----------------------------------|--------|---------|---------|
| Brand | 257 | 84.3 % | ± 4.1 % |
| Promotion | 256 | 83.9 % | ± 4.1 % |
| Advertising | 255 | 83.6 % | ± 4.2 % |
| Positioning | 251 | 82.3 % | ± 4.3 % |
| Social media | 234 | 76.7 % | ± 4.8 % |
| Marketing research | 230 | 75.4 % | ± 4.9 % |
| Competitive intelligence | 203 | 66.6 % | ± 5.3 % |
| Public relations | 186 | 61.0 % | ± 5.5 % |
| Lead generation | 173 | 56.7 % | ± 5.6 % |
| Market entry strategies | 168 | 55.1 % | ± 5.6 % |
| New products | 154 | 50.5 % | ± 5.6 % |
| Customer relationship management | 137 | 44.9 % | ± 5.6 % |
| Market selection | 122 | 40.0 % | ± 5.5 % |
| Pricing | 117 | 38.4 % | ± 5.5 % |
| Innovation | 114 | 37.4 % | ± 5.5 % |
| Sales | 82 | 26.9 % | ± 5.0 % |
| Customer service | 54 | 17.7 % | ± 4.3 % |
| Distribution | 45 | 14.8 % | ± 4.0 % |
| Stock market performance | 3 | 1.0 % | ± 1.1 % |
| Total | 3041 | | |

Number of Cases = 305

Number of Responses = 3041

Average Number Of Responses Per Case = 10.0

Number Of Cases With At Least One Response = 305

Response Percent = 100.0 %

Topic 8: Marketing Leadership

Number of reports

| | Median | Mean | SD | Minimum | Maximum | Range | Total |
|--|--------|------|------|---------|---------|-------|-------|
| How many direct reports do you have? | 4 | 8.6 | 27.8 | 0 | 350 | 350 | 289 |
| How many indirect reports (dotted-line) reports do you have? | 5 | 24.6 | 88.3 | 0 | 999 | 999 | 259 |

Topic 8: Marketing Leadership**How many years have you been with this firm in your current role? In any role?**

| | <u>Median</u> | <u>Mean</u> | <u>SD</u> | <u>Minimum</u> | <u>Maximum</u> | <u>Range</u> | <u>Total</u> |
|-----------------------|---------------|-------------|-----------|----------------|----------------|--------------|--------------|
| In your current role? | 3 | 4.1 | 3.9 | 0 | 23 | 23 | 299 |
| In any role? | 6 | 9.2 | 8.3 | 0 | 40 | 40 | 278 |

Topic 9: Marketing Analytics

What percent of your marketing budget...

| | Median | Mean | SD | Minimum | Maximum | Range | Total |
|---|--------|------|------|---------|---------|-------|-------|
| ...do you currently spend on marketing analytics? | 5 | 8.0 | 10.4 | 0 | 80 | 80 | 295 |
| ...will you spend in the next three years? | 10 | 13.5 | 15.9 | 0 | 100 | 100 | 290 |

Topic 9: 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 = 35.0

Median = 25

Standard Deviation (Unbiased) = 32.0

95 Percent Confidence Interval Around The Mean = 31.3 - 38.6

99 Percent Confidence Interval Around The Mean = 30.1 - 39.8

Quartiles

1 = 5

2 = 25

3 = 60

Valid Cases = 292

Missing Cases = 239

Response Percent = 55.0%

Topic 9: Marketing Analytics**Does your company formally evaluate the quality of marketing analytics?**

| | Number | Percent | 95% CI |
|-------|--------|---------|---------|
| Yes | 144 | 46.8 % | ± 3.8 % |
| No | 164 | 53.2 % | ± 4.0 % |
| Total | 308 | 100.0 % | |

Missing Cases = 223

Response Percent = 58.0 %

Topic 9: Marketing Analytics

To what degree has the use of marketing analytics contributed to your company's performance?

| | Number | Percent | 95% CI |
|---------------|--------|---------|---------|
| 7=Very Highly | 23 | 7.4 % | ± 1.7 % |
| 6= | 50 | 16.2 % | ± 2.5 % |
| 5= | 70 | 22.7 % | ± 2.9 % |
| 4= | 42 | 13.6 % | ± 2.3 % |
| 3= | 37 | 12.0 % | ± 2.2 % |
| 2= | 39 | 12.6 % | ± 2.2 % |
| 1=Not At All | 48 | 15.5 % | ± 2.5 % |
| Total | 309 | 100.0 % | |

Mean = 3.9

SD = 1.9

Missing Cases = 222

Response Percent = 58.2 %

Appendix: Firm-level Descriptive Information**Which economic sector best describes your firm?**

| | Number | Percent | 95% CI |
|----------------|--------|---------|---------|
| B2B - Product | 134 | 37.0 % | ± 3.7 % |
| B2B - Services | 117 | 32.3 % | ± 3.5 % |
| B2C - Product | 65 | 18.0 % | ± 2.8 % |
| B2C - Services | 46 | 12.7 % | ± 2.4 % |
| Total | 362 | 100.0 % | |

Missing Cases = 169

Response Percent = 68.2 %

Appendix: Firm-level Descriptive Information

What is your firm's ownership structure?

| | Number | Percent | 95% CI |
|------------------|--------|---------|---------|
| Public/NYSE/AMEX | 79 | 26.4 % | ± 3.0 % |
| Public/NASDAQ | 29 | 9.7 % | ± 1.9 % |
| Private | 185 | 61.9 % | ± 4.1 % |
| Nonprofit | 6 | 2.0 % | ± 0.9 % |
| Total | 299 | 100.0 % | |

Missing Cases = 232

Response Percent = 56.3 %

Appendix: Firm-level Descriptive Information

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

| | Number | Percent | Cumulative |
|---------------------------------|----------|--------------|----------------|
| Less than \$25 million | 74 | 25.7 % | 25.7 % |
| \$26-99 million | 58 | 20.1 % | 45.8 % |
| \$100-499 million | 48 | 16.7 % | 62.5 % |
| \$500-999 million | 22 | 7.6 % | 70.1 % |
| \$1-2.5 billion | 24 | 8.3 % | 78.5 % |
| \$2.6-5 billion | 18 | 6.3 % | 84.7 % |
| \$5.1-9.9 billion | 16 | 5.6 % | 90.3 % |
| \$10-49 billion | 20 | 6.9 % | 97.2 % |
| \$50-100 billion | 5 | 1.7 % | 99.0 % |
| <u>More than \$100+ billion</u> | <u>3</u> | <u>1.0 %</u> | <u>100.0 %</u> |
| Total | 288 | 100.0 % | 100.0 % |

Missing Cases = 243

Response Percent = 54.2 %

Appendix: Firm-level Descriptive Information

Which industry sector best describes your firm?

| | Number | Percent | 95% CI |
|----------------------------------|--------|---------|---------|
| Professional Services/Consulting | 56 | 18.7 % | ± 2.6 % |
| Manufacturing | 45 | 15.0 % | ± 2.4 % |
| Technology [Software/Biotech] | 39 | 13.0 % | ± 2.2 % |
| Health Care/Pharmaceutical | 32 | 10.7 % | ± 2.0 % |
| Banking/Finance/Insurance | 31 | 10.3 % | ± 2.0 % |
| Consumer Packaged Goods | 26 | 8.7 % | ± 1.8 % |
| Retail/Wholesale | 22 | 7.3 % | ± 1.7 % |
| Communications/Media | 17 | 5.7 % | ± 1.5 % |
| Consumer Services | 11 | 3.7 % | ± 1.2 % |
| Transportation | 10 | 3.3 % | ± 1.2 % |
| Energy | 6 | 2.0 % | ± 0.9 % |
| Mining/Construction | 5 | 1.7 % | ± 0.8 % |
| Total | 300 | 100.0 % | |

Missing Cases = 231

Response Percent = 56.5 %