DIGITAL DISTRESS:
What Keeps Marketers Up at Night?
Methodology

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

All data self-reported by respondents.

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

- **Digital Marketers** vs. **Marketing Generalists**
  - primarily digital-focused
  - mostly traditional, some digital
WHAT WE LEARNED
The marketing profession has **changed dramatically**

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

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

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

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

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

Marketers are most concerned about...

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

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

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

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

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

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

1. Marketing has value and that value can be measured
   
   AGREEMENT:
   ALL MARKETERS: 81%
   MARKETING STAFF: 83%
   DECISION MAKERS: 76%
   DIGITAL MARKETERS: 81%
   MARKETING GENERALISTS: 81%

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

3. For most companies, digital marketing approaches are in a constant cycle of trial and error
   
   AGREEMENT:
   ALL MARKETERS: 61%
   MARKETING STAFF: 61%
   DECISION MAKERS: 62%
   DIGITAL MARKETERS: 60%
   MARKETING GENERALISTS: 61%
2. MARKETERS’ CONCERNS
Marketeters do not have a clear consensus on what areas to focus on in the future.

**ALL MARKETERS: WHAT DO YOU THINK WILL BE THE MOST IMPORTANT TO MARKETERS IN THE NEXT 3 YEARS?**

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

**MARKETING STAFF** (n=499)

- Social Media Marketing: 14%
- Personalization and Targeting: 13%
- Creativity and Innovation in marketing programs: 10%
- Digital Advertising: 13%
- Cross-channel marketing: 10%
- E-Commerce: 7%
- Media Mix Planning: 9%
- Marketing Measurement: 7%
- Customer Response Management: 5%
- Content Marketing: 5%
- Brand Building: 3%
- Events: 2%
- Public Relations: 1%

**MARKETING DECISION MAKERS** (n=436)

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

**DIGITAL MARKETERS** (n=263)

- Social Media Marketing: 16%
- Personalization and Targeting: 13%
- Creativity and Innovation in marketing programs: 13%
- Digital Advertising: 13%
- Cross-channel marketing: 12%
- E-Commerce: 12%
- Media Mix Planning: 12%
- Marketing Measurement: 12%
- Customer Response Management: 11%
- Content Marketing: 11%
- Brand Building: 9%
- Events: 2%
- Public Relations: 2%

**MARKETING GENERALISTS** (n=754)

- Social Media Marketing: 12%
- Personalization and Targeting: 12%
- Creativity and Innovation in marketing programs: 16%
- Digital Advertising: 12%
- Cross-channel marketing: 12%
- E-Commerce: 12%
- Media Mix Planning: 9%
- Marketing Measurement: 12%
- Customer Response Management: 11%
- Content Marketing: 12%
- Brand Building: 11%
- Events: 11%
- Public Relations: 7%

Q16. Which one area do you think will be the most important to marketers in the next 3 years? (Select ONE only)

Base: TOTAL (n=1017)
60% of marketers expect their companies will invest more in digital marketing technology this year.

That investment is not being matched with marketer confidence.

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

Generalists are even less confident.

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

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

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

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

Of all marketers...

- **39%** say that they are highly proficient in digital marketing.
- **40%** say that their marketing colleagues/team are highly proficient in digital marketing.

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

<table>
<thead>
<tr>
<th></th>
<th>MARKETING STAFF</th>
<th>MARKETING DECISION MAKERS</th>
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<tbody>
<tr>
<td><strong>MARKETING STAFF</strong></td>
<td>n=499</td>
<td>n=436</td>
</tr>
<tr>
<td><strong>DIGITAL MARKETERS</strong></td>
<td>n=263</td>
<td></td>
</tr>
<tr>
<td>40%</td>
<td></td>
<td>40%</td>
</tr>
<tr>
<td><strong>MARKETING GENERALISTS</strong></td>
<td>n=754</td>
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<tr>
<td>48%</td>
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<td>37%</td>
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</table>

**MARKETING COLLEAGUES/TEAM**

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<tr>
<th></th>
<th>MARKETING STAFF</th>
<th>MARKETING DECISION MAKERS</th>
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<tbody>
<tr>
<td><strong>MARKETING STAFF</strong></td>
<td>n=499</td>
<td>n=436</td>
</tr>
<tr>
<td><strong>DIGITAL MARKETERS</strong></td>
<td>n=263</td>
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</tr>
<tr>
<td>43%</td>
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<td>35%</td>
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</tbody>
</table>

**MARKETING COLLEAGUES/TEAM**

<table>
<thead>
<tr>
<th></th>
<th>MARKETING STAFF</th>
<th>MARKETING DECISION MAKERS</th>
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</thead>
<tbody>
<tr>
<td><strong>MARKETING STAFF</strong></td>
<td>n=499</td>
<td>n=436</td>
</tr>
<tr>
<td><strong>DIGITAL MARKETERS</strong></td>
<td>n=263</td>
<td></td>
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<tr>
<td>45%</td>
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<td>39%</td>
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</tbody>
</table>

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX Base: DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)
Confidence in companies even lower

Of all marketers...

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>MARKETING STAFF</th>
<th>MARKETING DECISION MAKERS</th>
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</thead>
<tbody>
<tr>
<td><strong>COMPANY</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING STAFF</td>
<td>n=499</td>
<td></td>
</tr>
<tr>
<td>35%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>DIGITAL MARKETERS</td>
<td>n=263</td>
<td></td>
</tr>
<tr>
<td>38%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td><strong>INDUSTRY PEERS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MARKETING STAFF</td>
<td>n=499</td>
<td></td>
</tr>
<tr>
<td>47%</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>DIGITAL MARKETERS</td>
<td>n=263</td>
<td></td>
</tr>
<tr>
<td>48%</td>
<td>44%</td>
<td></td>
</tr>
</tbody>
</table>
Low confidence in e-commerce, targeting and measurement

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

Differences that are statistically significant are indicated in bold.

Q14. How well equipped do you feel to execute the following? TOP 2 BOX Base: TOTAL (n=1017)
Q18. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. Base: TOTAL (n=1017)

- Investing in digital channels/programs: 58% More than last year, 36% Same as last year, 5% Less than last year
- Investing in digital marketing technology: 60% More than last year, 35% Same as last year, 6% Less than last year
- Hiring staff with digital expertise: 45% More than last year, 46% Same as last year, 9% Less than last year

Digital capital investment expected to increase

ADOBE | DIGITAL DISTRESS: What Keeps Marketers Up at Night?
Ultimately, 61% of all marketers think that, for most companies, digital marketing approaches are a constant cycle of trial and error.

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

#### ALL MARKETERS: DO YOU AGREE WITH THESE STATEMENTS? (YES, TOP 2 BOX)

<table>
<thead>
<tr>
<th>Statement</th>
<th>ALL MARKETERS</th>
<th>MARKETING STAFF n=499</th>
<th>MARKETING DECISION MAKERS n=436</th>
<th>DIGITAL MARKETERS n=263</th>
<th>MARKETING GENERALISTS n=754</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is more pressure to show return on investment on marketing spend.</td>
<td>68%</td>
<td>72%</td>
<td>66%</td>
<td>69%</td>
<td>68%</td>
</tr>
<tr>
<td>We won’t succeed unless we have a successful digital marketing approach.</td>
<td>66%</td>
<td>68%</td>
<td>62%</td>
<td>72%</td>
<td>63%</td>
</tr>
<tr>
<td>I know our marketing is working.</td>
<td>59%</td>
<td>58%</td>
<td>61%</td>
<td>59%</td>
<td>59%</td>
</tr>
<tr>
<td>I have the digital skills and tools necessary to do my job effectively.</td>
<td>58%</td>
<td>59%</td>
<td>58%</td>
<td>62%</td>
<td>57%</td>
</tr>
<tr>
<td>We are under pressure to move to digital faster.</td>
<td>50%</td>
<td>54%</td>
<td>47%</td>
<td>54%</td>
<td>49%</td>
</tr>
<tr>
<td>I know my digital marketing is working.</td>
<td>48%</td>
<td>47%</td>
<td>48%</td>
<td>53%</td>
<td>46%</td>
</tr>
<tr>
<td>I know more about digital marketing than my manager.</td>
<td>44%</td>
<td>41%</td>
<td>49%</td>
<td>46%</td>
<td>43%</td>
</tr>
<tr>
<td>I feel overwhelmed by the pace of change in digital.</td>
<td>37%</td>
<td>34%</td>
<td>40%</td>
<td>41%</td>
<td>36%</td>
</tr>
<tr>
<td>My boss doesn’t want to invest enough in digital marketing.</td>
<td>34%</td>
<td>32%</td>
<td>38%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>People who work for me know more about digital marketing than I do.</td>
<td>34%</td>
<td>20%</td>
<td>33%</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>My marketing colleagues don’t really know what they’re doing.</td>
<td>19%</td>
<td>20%</td>
<td>19%</td>
<td>23%</td>
<td>18%</td>
</tr>
</tbody>
</table>

*Differences that are statistically significant are indicated in bold*

Q17. Please rate each of the following statements based on whether you agree or disagree: TOP 2 BOX Base: TOTAL (1017)
While almost half of respondents claim to know their digital marketing is working, only 9% strongly agree.

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

- I know our marketing is working
- I know our digital marketing is working
- We won’t succeed unless we have a successful digital marketing approach

Confidence in digital is notably lower...

But marketers recognize its importance.
Marketers overwhelmingly place importance on ROI

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

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

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

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

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

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

Knowledge overwhelmingly gained on the job

Q8. How have you acquired your digital marketing knowledge? Base: TOTAL (n=1017)

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

Differences that are statistically significant are indicated in **bold**
In your own words, what is the most important concern or issue for marketers today?

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

2. Keeping Current
   - “The fast pace of changing technology, and finding what works on different platforms.”
   - “Learning new technology while on the job.”
   - “Keeping up with changes in digital/Social Media Marketing and the level of creativity out there.”
   - “Just keeping up.”
   - “Getting ahead of curve - no longer enough just to keep up.”
How do you keep up with the pace of marketing and stay in touch with latest trends and information? (n=1017)

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

Importance
“How important should this be to your company?”

Performance
“How well is your company performing on this?”

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

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

Importance vs. Performance: **All Marketers**

- **Brand Building**: Importance 79%, Performance 47%, GAP 32%
- **Marketing Measurement**: Importance 76%, Performance 29%, GAP 47%
- **Content Management**: Importance 76%, Performance 36%, GAP 40%
- **Creativity and Innovation in marketing programs**: Importance 75%, Performance 33%, GAP 42%
- **Customer Response Management**: Importance 75%, Performance 33%, GAP 42%
- **Personalization and Targeting**: Importance 71%, Performance 31%, GAP 40%
- **Cross-channel marketing**: Importance 71%, Performance 33%, GAP 38%
- **Digital Advertising**: Importance 69%, Performance 31%, GAP 38%
- **Public Relations**: Importance 68%, Performance 35%, GAP 33%
- **Media Mix Planning**: Importance 68%, Performance 33%, GAP 36%
- **Social Marketing**: Importance 64%, Performance 31%, GAP 33%
- **Events**: Importance 58%, Performance 39%, GAP 19%
- **E-Commerce**: Importance 52%, Performance 26%, GAP 26%

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

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=1017)
Introduction to Correlation Analysis

Ultimately, we compared

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>Category</th>
<th>ALL MARKETERS</th>
<th>MARKETING STAFF n=399-472</th>
<th>MARKETING DECISION MAKERS n=359 - 419</th>
<th>DIGITAL MARKETERS n=208-340</th>
<th>MARKETING GENERALISTS n=596-714</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Advertising</td>
<td>0.68</td>
<td>0.72</td>
<td>0.65</td>
<td>0.64</td>
<td>0.69</td>
</tr>
<tr>
<td>Content Management</td>
<td>0.58</td>
<td>0.60</td>
<td>0.58</td>
<td>0.58</td>
<td>0.57</td>
</tr>
<tr>
<td>Cross-channel marketing</td>
<td>0.57</td>
<td>0.57</td>
<td>0.58</td>
<td>0.58</td>
<td>0.57</td>
</tr>
<tr>
<td>Media Mix Planning</td>
<td>0.56</td>
<td>0.56</td>
<td>0.54</td>
<td>0.50</td>
<td>0.58</td>
</tr>
<tr>
<td>Creativity and Innovation in marketing</td>
<td>0.56</td>
<td>0.54</td>
<td>0.57</td>
<td>0.48</td>
<td>0.59</td>
</tr>
<tr>
<td>Marketing Measurement</td>
<td>0.56</td>
<td>0.59</td>
<td>0.55</td>
<td>0.49</td>
<td>0.58</td>
</tr>
<tr>
<td>Social Media Marketing</td>
<td>0.55</td>
<td>0.56</td>
<td>0.57</td>
<td>0.41</td>
<td>0.60</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>0.55</td>
<td>0.52</td>
<td>0.57</td>
<td>0.51</td>
<td>0.56</td>
</tr>
<tr>
<td>Personalization and Targeting</td>
<td>0.54</td>
<td>0.54</td>
<td>0.54</td>
<td>0.48</td>
<td>0.57</td>
</tr>
<tr>
<td>Customer Response Management</td>
<td>0.49</td>
<td>0.51</td>
<td>0.47</td>
<td>0.39</td>
<td>0.54</td>
</tr>
<tr>
<td>Public Relations</td>
<td>0.45</td>
<td>0.46</td>
<td>0.41</td>
<td>0.39</td>
<td>0.48</td>
</tr>
<tr>
<td>Brand Building</td>
<td>0.44</td>
<td>0.46</td>
<td>0.38</td>
<td>0.27</td>
<td>0.5</td>
</tr>
<tr>
<td>Events</td>
<td>0.29</td>
<td>0.25</td>
<td>0.33</td>
<td>0.29</td>
<td>0.30</td>
</tr>
</tbody>
</table>

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

N varies due to some respondents indicating DK or NA.
Content management maintains strong importance across both stated and derived

Stated Importance (% top 2 box score)

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

Derived Importance (Correlation to overall performance)

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

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

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

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

10. How effective is your company overall in terms of digital marketing? 12. Please tell us how well you feel your company is currently performing on each of the following: Base: TOTAL (n=804-1017)
Marketing Generalists are more likely to rate everything as important and have less differentiated derived importance.

Marketing Generalists

Stated Importance (% top 2 box score)

Derived Importance (Correlation to overall performance)

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

Derived Importance

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

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

ADOBE | DIGITAL DISTRESS: What Keeps Marketers Up at Night?
4. THE ROADMAP TO SUCCESS
We also wanted to see what **high performing companies** are doing and how they differ from companies that performed at or below average.

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Performance Description</th>
<th>“High Performers”</th>
<th>“Lower Performers”</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Superior business performance (i.e. your company has out-performed key competitors in terms of sales or revenue)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Average business performance (i.e. your company performed similarly to key competitors)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Below average business performance (i.e. your company has recorded lower sales or revenue than key competitors)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Lower Performers</th>
<th>High Performers</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is more pressure to show return on investment on marketing spend.</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>We won't succeed unless we have a successful digital marketing approach.</td>
<td>64%</td>
<td>68%</td>
</tr>
<tr>
<td>I know our marketing is working.</td>
<td>50%</td>
<td>76%</td>
</tr>
<tr>
<td>I have the digital skills and tools necessary to do my job effectively.</td>
<td>52%</td>
<td>76%</td>
</tr>
<tr>
<td>We are under pressure to move to digital faster.</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td>I know more about digital marketing than my manager.</td>
<td>38%</td>
<td>64%</td>
</tr>
<tr>
<td>I feel overwhelmed by the pace of change in digital.</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>My boss doesn't want to invest enough in digital marketing.</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>People who work for me know more about digital marketing than I do.</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>My marketing colleagues don't really know what they're doing.</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Base: Superior business performance (n=371); Average OR below business performance (n=646)
High performing companies are investing more in digital

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

Base: Superior business performance (n=371); Average OR below business performance (n=646)
At high performing companies, **half of marketers** think the company’s digital marketing expertise is proficient. While that is not particularly high...

...It’s still better than **lower performing companies**, where it’s only **one in four**.

Q15. How proficient do you feel each of the following are in terms of digital marketing expertise? TOP 2 BOX BASE: Superior business performance (n=371); Average OR below business performance (n=646)
High-performers are twice as likely to rate their company as proficient – and more likely to rate themselves and their colleagues as such.

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

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

<table>
<thead>
<tr>
<th></th>
<th>HIGH PERFORMERS</th>
<th>LOWER PERFORMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say their company is effective in overall marketing</td>
<td>62%</td>
<td>28%</td>
</tr>
<tr>
<td>Say their company is effective in digital marketing</td>
<td>49%</td>
<td>22%</td>
</tr>
<tr>
<td>Say “I know which of my marketing channels are most effective”</td>
<td>70%</td>
<td>52%</td>
</tr>
<tr>
<td>Are satisfied with current marketing mix</td>
<td>86%</td>
<td>60%</td>
</tr>
<tr>
<td>Say “I know that our digital marketing is working”</td>
<td>68%</td>
<td>43%</td>
</tr>
</tbody>
</table>

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

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

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

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

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

<table>
<thead>
<tr>
<th>Issue</th>
<th>All Marketers</th>
<th>Staff</th>
<th>Decision Makers</th>
<th>Digital Marketers</th>
<th>Generalists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reaching customers</td>
<td>82%</td>
<td>82%</td>
<td>81%</td>
<td>76%</td>
<td>84%</td>
</tr>
<tr>
<td>Understanding whether campaigns are working</td>
<td>79%</td>
<td>80%</td>
<td>77%</td>
<td>73%</td>
<td>81%</td>
</tr>
<tr>
<td>Proving campaign effectiveness</td>
<td>77%</td>
<td>82%</td>
<td>72%</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Demonstrating marketing return on investment</td>
<td>75%</td>
<td>78%</td>
<td>72%</td>
<td>71%</td>
<td>77%</td>
</tr>
<tr>
<td>Using digital tools effectively</td>
<td>70%</td>
<td>73%</td>
<td>66%</td>
<td>70%</td>
<td>71%</td>
</tr>
<tr>
<td>Keeping up with all the changes in marketing</td>
<td>65%</td>
<td>66%</td>
<td>63%</td>
<td>61%</td>
<td>67%</td>
</tr>
<tr>
<td>Keeping up with digitally-savvy competitors</td>
<td>59%</td>
<td>61%</td>
<td>56%</td>
<td>63%</td>
<td>58%</td>
</tr>
<tr>
<td>Shrinking budgets</td>
<td>54%</td>
<td>55%</td>
<td>51%</td>
<td>52%</td>
<td>55%</td>
</tr>
</tbody>
</table>
## Digital marketers more concerned about ROI

**ALL MARKETERS: WHAT ARE YOU MOST CONCERNED ABOUT?**

<table>
<thead>
<tr>
<th></th>
<th>Reaching customers</th>
<th>Understanding whether campaigns are working</th>
<th>Demonstrating marketing return on investment</th>
<th>Shrinking budgets</th>
<th>Proving campaign effectiveness</th>
<th>Using digital tools effectively</th>
<th>Keeping up with all the changes in marketing</th>
<th>Keeping up with digitally-savvy competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>6</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>5</td>
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<tr>
<td>5</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>6</td>
<td>7</td>
<td>6</td>
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<tr>
<td>6</td>
<td>6</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
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<tr>
<td>7</td>
<td>7</td>
<td>7</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>8</td>
<td>8</td>
<td>7</td>
<td>2</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

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

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

Marketing Decision Makers vs. Staff

- Senior Manager/Marketing Decision Maker: 43%
- Marketing Staff: 49%
- Other: 8%

TOP TITLES

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

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

S5a. Please indicate your title from the list below. Base: TOTAL (n=1017)
59% Marketing Generalists
41% Digital Marketers

60% Studied marketing in school
40% Did not study marketing in school

51% Decision makers

Software/Products/Services Authority

- 13% I am the sole decision maker when it comes to choosing digital marketing solutions for my organization
- 38% I am one of several decision makers
- 25% I am not a decision maker, but I have significant influence on decisions on digital marketing solutions
- 16% I can request solutions, but I do not have significant influence on what is purchased
- 8% I have no influence in the decision-making process

D9. Did you study marketing in school? Base: TOTAL (n=1017)
S3. Please indicate below which option more closely describes your marketing role in your current company: “Marketing that is predominantly digitally focused”/”More traditional marketing but may employ some digital marketing tools (Generalist)” Base: TOTAL (n=1017)
D6. Which ONE of the following best describes your role in DECIDING WHICH digital marketing solutions (e.g., software products and services) you and/or your department will use for work? Base: TOTAL (n=1017)
Organization Marketing Efforts

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

Demographics

Company Size

- **Small** (Fewer than 100 employees)
- **Medium** (100-999 employees)
- **Large** (1,000-9,999 employees)
- **Enterprise** (9,999 + employees)
ADDITIONAL INFORMATION
Who do you turn to?

WHO DO YOU TURN TO FIRST FOR DIGITAL MARKETING ADVICE?

Q19. Who do you turn to first for digital marketing advice? TOP 2 BOX Base: TOTAL (n=1017)
MARKETING STAFF (n=499) MKETING DECISION MAKERS (n=436) DIGITAL MARKETERS (n=263) MARKETING GENERALISTS (n=754)

- Marketing colleagues in your company
- Professional industry associations/communities
- Industry analysts/research reports
- Agencies
- Industry peers from other companies
- Industry publications/websites
More than ½ think digital marketing is trial and error

**ALL MARKETERS**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage Agreeing</th>
<th>Percentage Disagreeing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing has value and that value can be measured</td>
<td>81%</td>
<td>7%</td>
</tr>
<tr>
<td>Marketing has changed more in the last 2 years than in the last 50</td>
<td>76%</td>
<td>7%</td>
</tr>
<tr>
<td>For most companies, digital marketing approaches are in a constant cycle of trial and error</td>
<td>61%</td>
<td>10%</td>
</tr>
<tr>
<td>I know which of my marketing channels are most effective</td>
<td>59%</td>
<td>15%</td>
</tr>
<tr>
<td>I feel well armed with the information to be an effective marketer</td>
<td>56%</td>
<td>14%</td>
</tr>
<tr>
<td>My company’s digital marketing approach is in a constant cycle of trial and error</td>
<td>54%</td>
<td>18%</td>
</tr>
<tr>
<td>I know that our digital marketing is working</td>
<td>52%</td>
<td>15%</td>
</tr>
<tr>
<td>Our company has the right technology to be effective</td>
<td>50%</td>
<td>24%</td>
</tr>
<tr>
<td>Marketers are more likely than other professions to feel unsure about the effectiveness of their work</td>
<td>49%</td>
<td>33%</td>
</tr>
<tr>
<td>Consumers have become harder to reach</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>I feel outgunned by other companies’ marketing</td>
<td>33%</td>
<td>37%</td>
</tr>
<tr>
<td>I don’t know if my industry peers are ahead of me in terms of digital marketing</td>
<td>28%</td>
<td>33%</td>
</tr>
</tbody>
</table>
Marketing mix satisfaction

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

Marketers want to boost investments in:

1. TV   2. Print   3. Social

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

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

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

**All Marketers**: n=1,017

**Marketing Staff**: n=499

**Marketing Decision Makers**: n=436

**Digital Marketers**: n=263

**Marketing Generalists**: n=754
Marketing measurement and creativity fall short among staff

Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX Base: TOTAL (n=499)

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=499)
Decision Makers see opportunity in customer response management and targeting

Importance vs. Performance: Marketing Decision Makers

- Brand Building: 45% important, 77% performance, GAP 32%
- Marketing Measurement: 26% important, 74% performance, GAP 48%
- Creativity and Innovation in marketing programs: 35% important, 72% performance, GAP 37%
- Content Management: 34% important, 72% performance, GAP 38%
- Customer Response Management: 31% important, 69% performance, GAP 38%
- Personalization and Targeting: 29% important, 67% performance, GAP 38%
- Public Relations: 35% important, 67% performance, GAP 32%
- Cross-channel marketing: 31% important, 65% performance, GAP 34%
- Media Mix Planning: 34% important, 64% performance, GAP 31%
- Digital Advertising: 27% important, 62% performance, GAP 35%
- Social Marketing: 28% important, 61% performance, GAP 33%
- Events: 40% important, 55% performance, GAP 14%
- E-Commerce: 26% important, 49% performance, GAP 24%

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

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

Importance vs. Performance: Digital Marketers

<table>
<thead>
<tr>
<th>Category</th>
<th>Importance (%)</th>
<th>Performance (%)</th>
<th>(GAP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Management</td>
<td>37%</td>
<td></td>
<td>39%</td>
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<tr>
<td>Creativity and Innovation in marketing programs</td>
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<td></td>
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<td>Brand Building</td>
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<td>E-Commerce</td>
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<td>34%</td>
</tr>
<tr>
<td>Events</td>
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Generalists see opportunity in creativity and customer response management

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

Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX Base: TOTAL (n=754)
Social media on the rise

WHAT DO YOU THINK WILL BE THE MOST IMPORTANT TO MARKETERS IN THE NEXT 3 YEARS?

**SUPERIOR PERFORMANCE**

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

**AVG/Below AVG PERFORMANCE**

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

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<th>Average OR Below Average Performance</th>
<th>(GAP)</th>
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Q14. On a 1 to 10 scale where 1 is NOT AT ALL IMPORTANT and 10 is EXTREMELY IMPORTANT, how important should each of the following be to your company? TOP 3 BOX; Q12. Please tell us how well you feel your company is currently performing on each of the following. TOP 3 BOX: Superior business performance (n=371); Average OR below business performance (n=646)