

SIXTH EDITION

STATE *of* MARKETING

Insights and trends from nearly 7,000 senior marketers leading through change



A Note From Stephanie Buscemi

Salesforce Chief Marketing Officer



Stephanie Buscemi

Chief Marketing Officer,
Salesforce

Our worlds have been turned upside down.

The health and safety of our families, friends, and communities is top of mind, but most of us are also wondering, “Where do we go from here?” For marketers, that’s a multifaceted question. As ambassadors to the public, we must ask ourselves how to best reposition our brands. As a line of communication to customers, we must ask ourselves how we can be more empathic and understanding. As partners to the business, we must ask ourselves how to best collaborate with our colleagues in sales, customer service, and beyond as we seek a return to growth.

Salesforce collected data from marketing leaders across the globe for this “State of Marketing” report just as the COVID-19 crisis emerged. When the scope of the crisis became clear, we asked ourselves, “Will this report provide relevance and value to our customers?”. Ultimately, after carefully dissecting survey results, we deemed the answer to be “yes.”

We made this decision because the report demonstrates the values that will remain critical as marketers and their businesses recover:

- Relentless focus on the customer experience
- Unwavering commitment to helpfulness, relevancy, and trustworthiness
- Continuous pursuit of innovation

The insights in this report demonstrate the importance of these values and what top marketers do to live by them. As we look toward – and get to work building – better times ahead, I hope you find this year’s “State of Marketing” to be a helpful guide.

Onward,

A handwritten signature in black ink that reads "Stephanie Buscemi". The signature is written in a cursive, flowing style.

Stephanie Buscemi

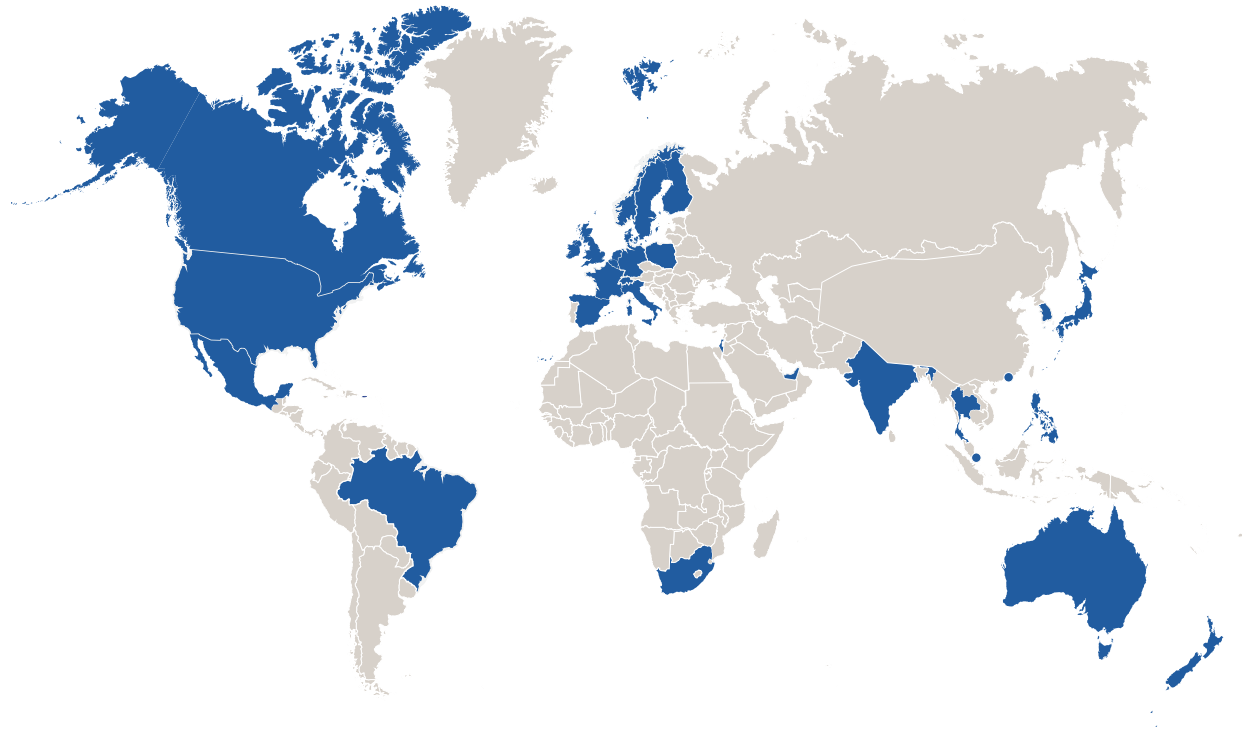
For the sixth edition of our “State of Marketing” report, Salesforce Research surveyed nearly 7,000 marketing leaders worldwide to discover:

- Changing definitions of marketing success
- Shifts in engagement standards and privacy practices
- Evolving marketing skill sets and processes
- Unfolding data management strategies and tactics

Data in this report is from a double-blind survey conducted from January 8 through February 11, 2020, that generated 6,950 responses from full-time marketing leaders – those holding a manager or higher leadership role. Respondents include marketers from B2B, B2C, and B2B2C companies across North America, Latin America, Asia Pacific, Europe, the Middle East, and Africa.

All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 87.

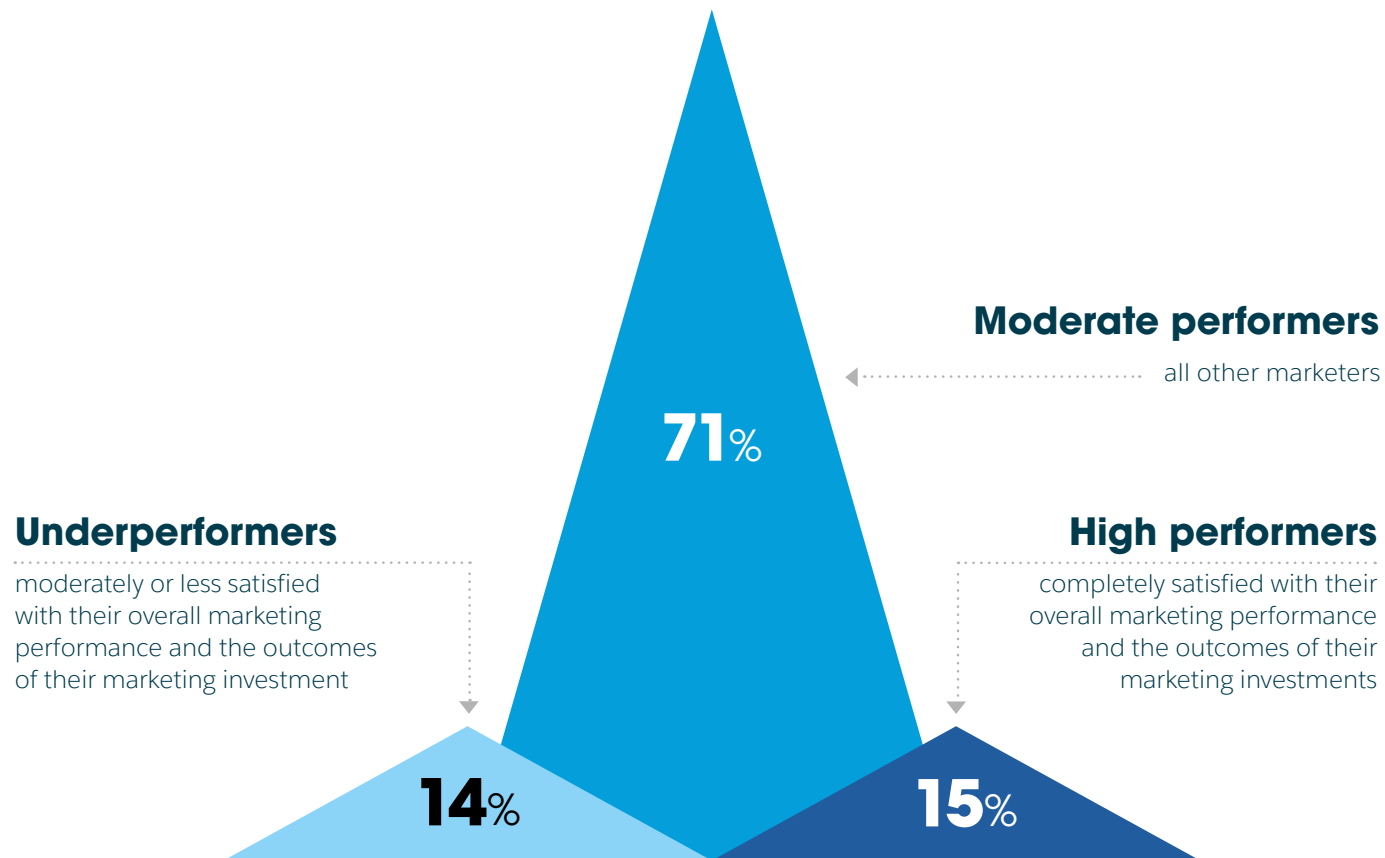
Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).



Salesforce Research provides data-driven insights to help businesses transform how they drive customer success.
Browse all reports at salesforce.com/research.

Distribution of Marketing Performance Levels

Throughout this report, we classify survey respondents across the following three tiers of marketing performance.



* For further survey demographics, see page 87.

Executive Summary	06
Introduction	07
01 Marketing Transformation Takes On New Urgency	10
02 Customer Data Sets the Stage for Empathetic Marketing	17
03 Marketers Double Down on Business Value	22
Look Ahead: The Next Decade of Marketing Innovation	26
Country Profiles	27
Industry Profiles	54
Appendix	69
Survey Demographics	86

As technology drives customer expectations to new heights, marketers have emerged as not just messengers, but engagers who foster meaningful customer relationships well beyond the first purchase.

In the wake of the COVID-19 pandemic, standards of customer engagement are shifting yet again, and marketers are on the forefront of innovation.

01 | Marketing Transformation Takes On New Urgency

(See page 10)

The expectations and behaviors of consumers, businesses, and society at large are shifting with unprecedented speed and magnitude. Marketers are under tremendous pressure to overhaul their organizational models and use of technology to provide differentiated, digital-first customer engagement. **Innovation is marketing leaders' number one priority.**

02 | Customer Data Sets the Stage for Empathetic Marketing

(See page 17)

As customers navigate a series of “new normals,” personalized, empathetic engagement has never been more important. Delivering messages and offers that resonate with an individual’s unique needs and expectations requires deep insights. Marketers are shifting how they source and manage customer data and ramping up use of technologies like artificial intelligence (AI) that help them make the most of it. **Marketers report a 186% increase in AI adoption since 2018.**

03 | Marketers Double Down on Business Value

(See page 22)

As businesses shift from crisis triage to recovery and adaptation, marketers have a unique opportunity to turn trusted customer relationships into business value. Marketers increasingly track metrics like customer satisfaction, digital engagement, and lifetime customer value to gain a holistic picture of what’s working and what isn’t across the customer journey. B2B marketers have a particularly strong role in business growth through account-based marketing (ABM). **Ninety-two percent of B2B marketers have an ABM program.***

* Includes B2B2C marketers.

Introduction

Customer Experience and Innovation Put Marketers Under Pressure

As companies look to connect and build trust in uncertain times, customer experience has become more important than ever.

84% of customers say the experience a company provides is as important as its products and services – up from 80% in 2018.*

The share of marketers leading the customer experience charge has skyrocketed over the past two years. **Eighty-eight percent of high performers lead customer experience initiatives across their organizations, compared to 68% of underperformers.**

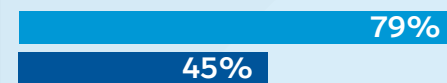
But shifting mindsets and on-the-ground execution are two very different things, and many marketers struggle to match operations to aspirations. **Fewer than half of marketing organizations track customer lifetime value (LTV).**



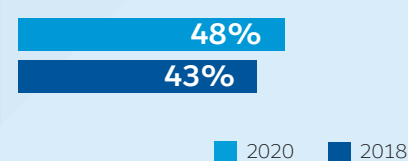
Customer Experience Aspiration Is Rising Faster Than Operationalization

Marketers Who Agree with the Following

We lead customer experience initiatives across the organization



We track customer lifetime value (LTV)



■ 2020 ■ 2018



* "State of the Connected Customer," Salesforce Research, June 2019.

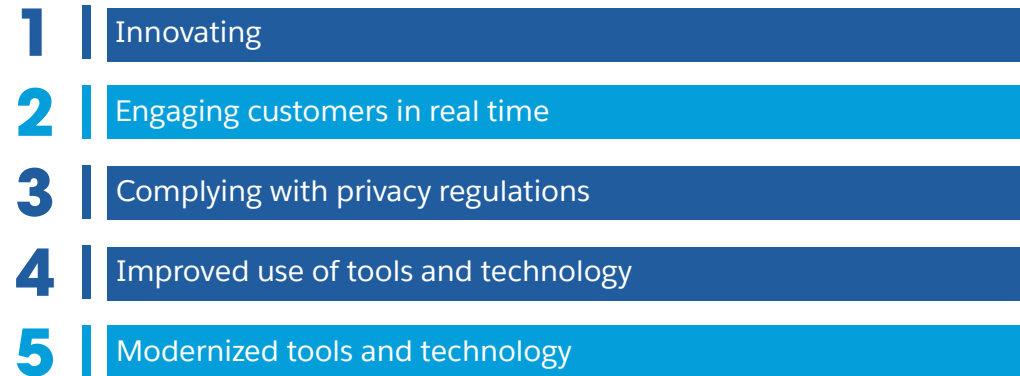
Customer Experience and Innovation Put Marketers Under Pressure

Innovation fundamentally means adaptation to change, making it nothing short of critical under current circumstances. Even before the COVID-19 pandemic, marketers recognized innovation as their top priority. Given the speed of change today, real-time engagement is well-positioned as job number two.

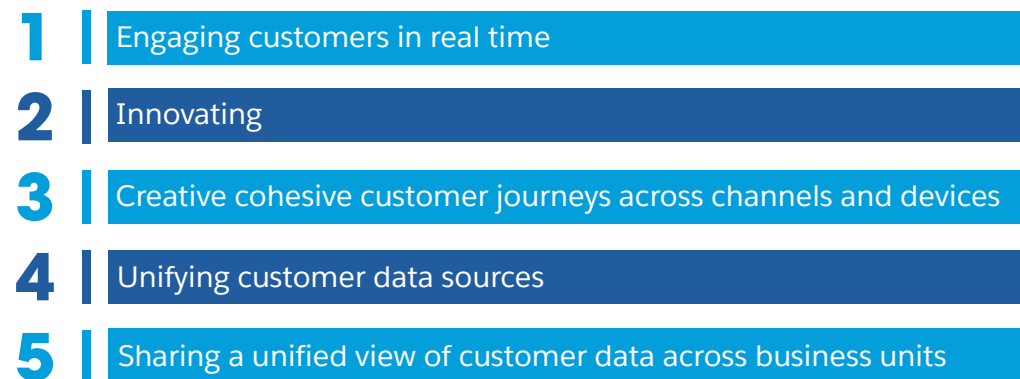
Innovative, trusted, real-time engagement is no easy feat, and so improved tools and technologies round out the top five marketing priorities of 2020. However, marketers recognize that reaching their ambitious goals will be challenging. Unifying and operationalizing customer data to create the cohesive journeys that customers want is particularly daunting.

Innovation, Real-Time Engagement, and Privacy Drive Marketing Agendas and Pain Points

Marketers' Top Priorities



Marketers' Top Challenges



■ New to top 5 for 2020 ■ Carryover from top 5 in 2018

Practitioner Perspective

Marketers Re-Evaluate Budgets for a New Era

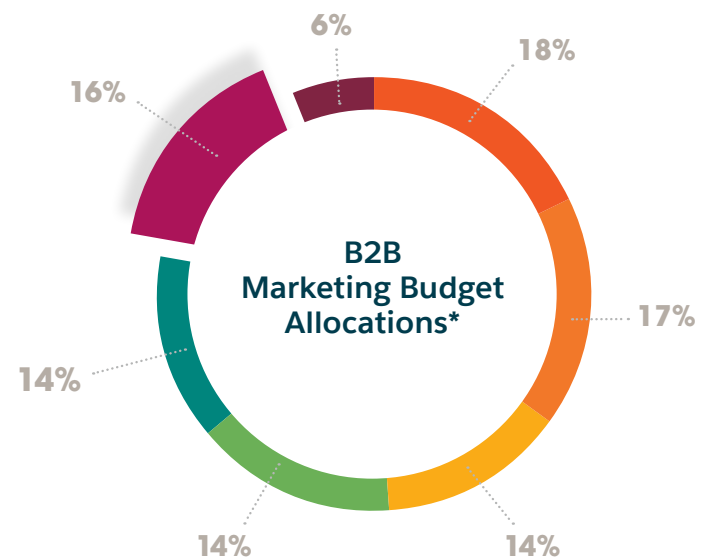
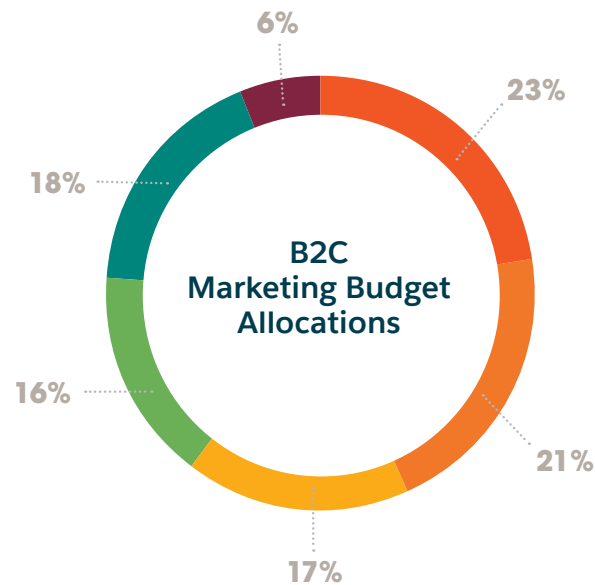
Prior to the COVID-19 pandemic, marketing budgets represented a diverse array of initiatives far beyond advertising. Like all business leaders, CMOs are now reevaluating where to spend.

“Now is the time to reaffirm your brand fundamentals to the consumers who trusted you prior to COVID-19. This is what should drive any budget strategy and adjustment decisions. Where time must be spent – and potential adjustments made – are in the messages you send and the channels through which you deliver them.”

Doug Zarkin
Chief Marketing Officer, Pearle Vision

“Every leader must be adaptable in unprecedented times like these when thinking about strategy and budget. As business buyers reevaluate their purchase and growth plans for the year, our focus has to reflect that and adjust to changing buying cycles. In the short-term, tactics like trade shows and some advertising might be reduced or paused, but investment in tactics like ABM, content marketing, and critical technology remains key.”

Phil B. Clement
Chief Marketing Officer, Johnson Controls



■ Advertising
 ■ Technology
 ■ People
 ■ Research
 ■ Content
 ■ Account-based marketing
 ■ Other

* Includes B2B2C marketers.
Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result.
Base: CMOs and VPs of marketing.

01 Marketing Transformation Takes On New Urgency

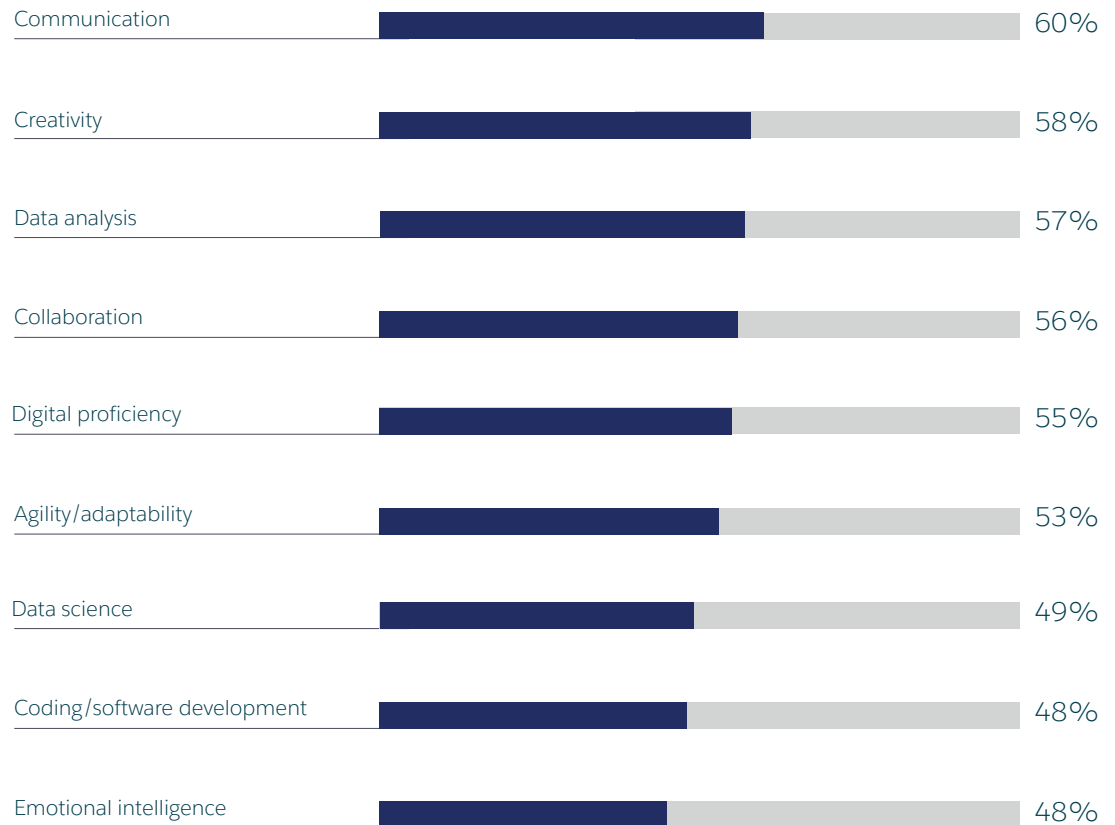
A lot of attention is placed on the changing role of technology. However, the people behind this technology remain the foundation of any marketing organization.

The definition of a good marketer in 2020 is expanding in a big way. In addition to their creativity and ways with words, today's top marketers are data-savvy collaborators who capture, organize, and activate insights that foster the connected journeys customers expect.

Marketers generally rate their teams as advanced across a wide array of skills, with particular confidence in their communication, creativity, and data analysis abilities. While coding and data science rank near the bottom of marketers' self-assessment, the most soft skill of all – emotional intelligence – needs the most work at a time when it is most needed.

Marketing Is Both a Science and an Art

Marketers Who Rate Their Team's Skills as Advanced



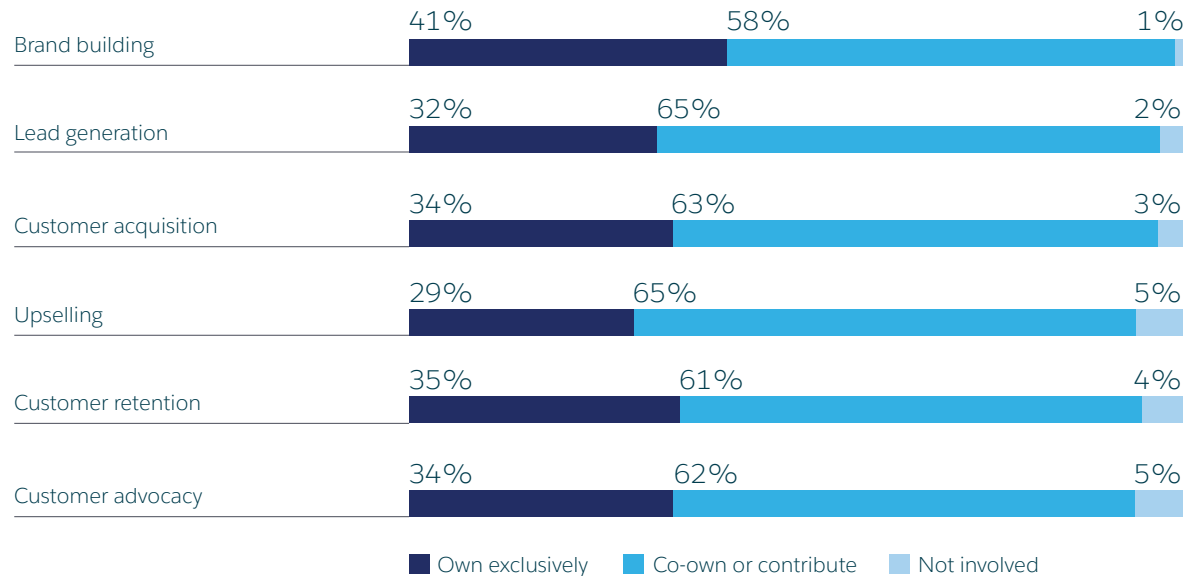
Now more than ever, it's critical for marketers to have a cohesive understanding of a customer's full journey. Today's marketers are applying their expertise at every stage from branding to acquisition to retention and advocacy. Traditional marketing roles focused on specific stages of the sales funnel, or on tactics like email or social media, are falling out of favor.

69% of marketers say traditional marketing roles limit customer engagement – up from 37% in 2018.

It's now the exception to the rule for marketers to “own” a given stage of the customer journey. Instead, most collaborate with peers on building cohesive experiences from the moment a prospect discovers their brand to when they post a rave review and beyond. Hardly any marketers describe themselves as detached from a given stage of the customer journey.

Marketing Is a Team Effort Across the Customer Journey

Extent to Which Individual Marketers Are Involved in the Following

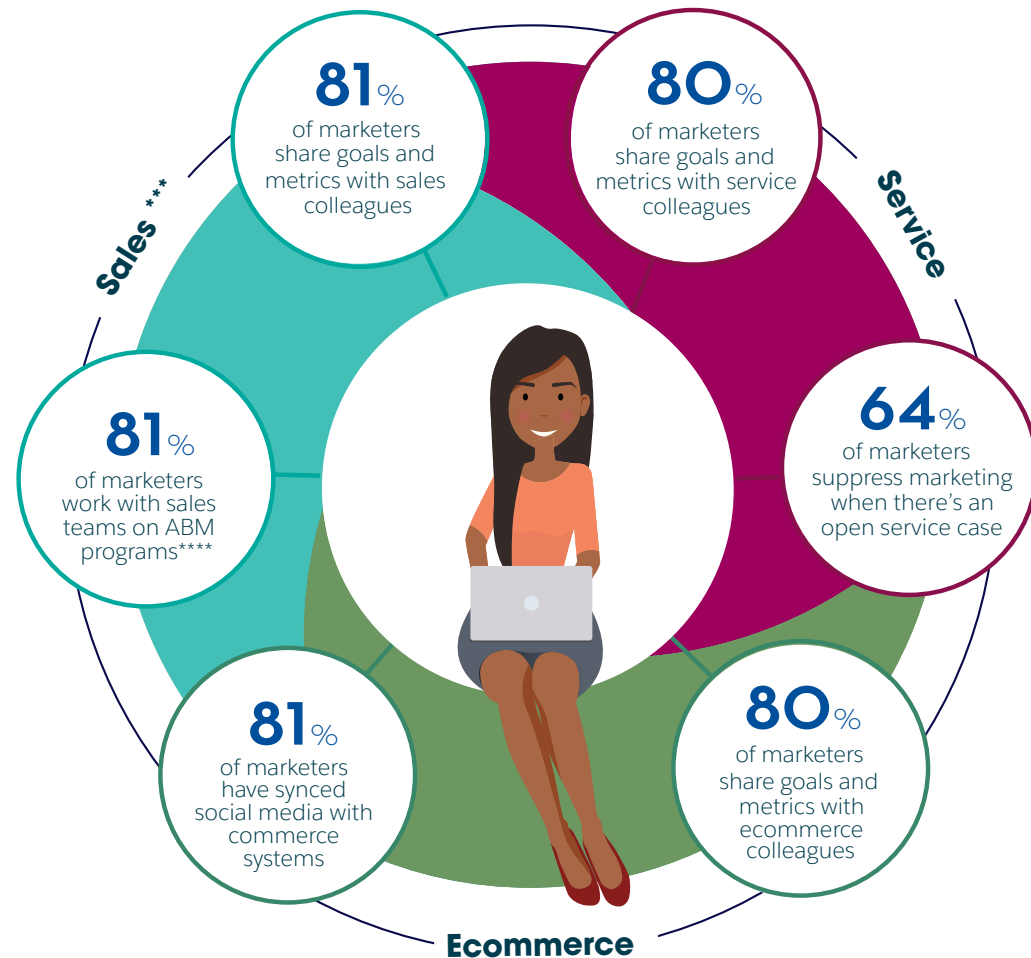


Today, customers seek more and new types of information from businesses through more and new types of channels. Marketers have forged new processes and relationships with cross-functional colleagues to take on this challenge. **Sixty-nine percent of customers expect connected experiences.***

63% of marketers use the same CRM system as sales and service departments.**

The vast majority of marketing teams share common goals and metrics with colleagues in sales, ecommerce, and customer service. What's more, they collaborate through strategic initiatives like account-based marketing (ABM) programs, or through tactics like factoring a customer's unresolved service tickets when sending marketing communications.

Cross-Functional Collaboration Is Table Stakes



See page 72 for additional data segmentations.

* "State of the Connected Customer," Salesforce Research, June 2019.

** Base: Marketers who use a CRM system.

*** Base: B2B and B2B2C marketers.

**** Base: B2B and B2B2C marketers with an ABM program.

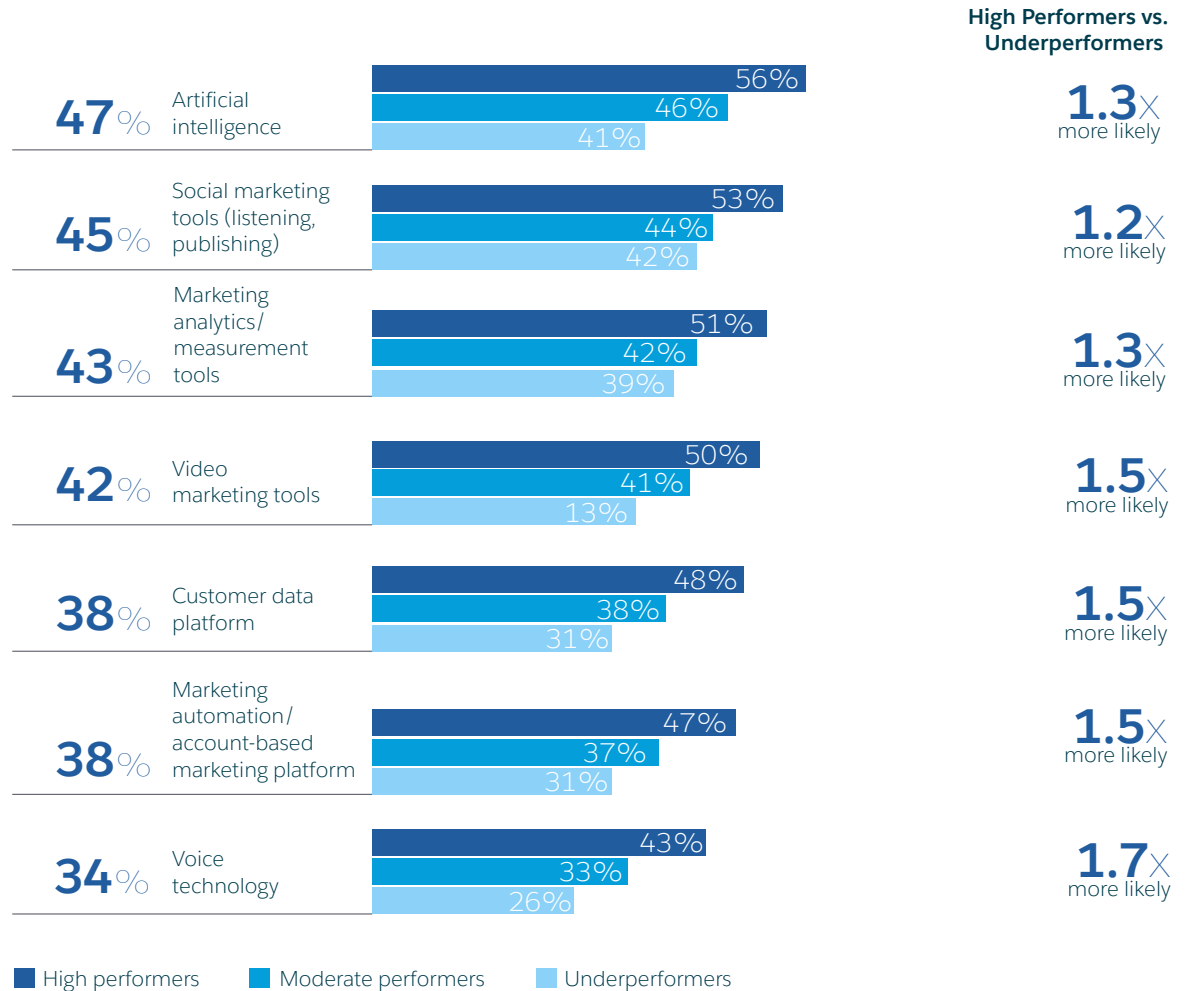
Many marketers – and high performers in particular – are increasingly turning to an array of digital tools and platforms to engage customers at precisely the right moment, on the right channel.

Marketers are particularly keen to expand their use of artificial intelligence (AI). Tools that optimize social media, mobile, and video marketing are also increasingly prominent as customers shift to digital channels. Analytics and measurement tools that let marketers gauge what's working and what isn't are also being used more heavily.

72% of marketers say they are aligned with their IT organizations, yet IT leaders rank insufficient business unit alignment as a top challenge.*

AI, Social Tools, and Analytics Are Most Primed for Expanded Roles

Marketers Planning to Increase Use of the Following over the Next Year



* "Enterprise Technology Trends," Salesforce Research, May 2019. See page 75 for additional data segmentations.

Base: Marketers who use the indicated technology.

Omni-channel marketing is not new, but it's never been more relevant. Today's customers – whether buying for themselves or on behalf of their companies – hop from channel to channel throughout their days.

Marketers are meeting the challenge by increasing their adoption of various digital touchpoints. Search engine marketing, customer communities, and mobile apps are experiencing particularly dramatic increases in use.

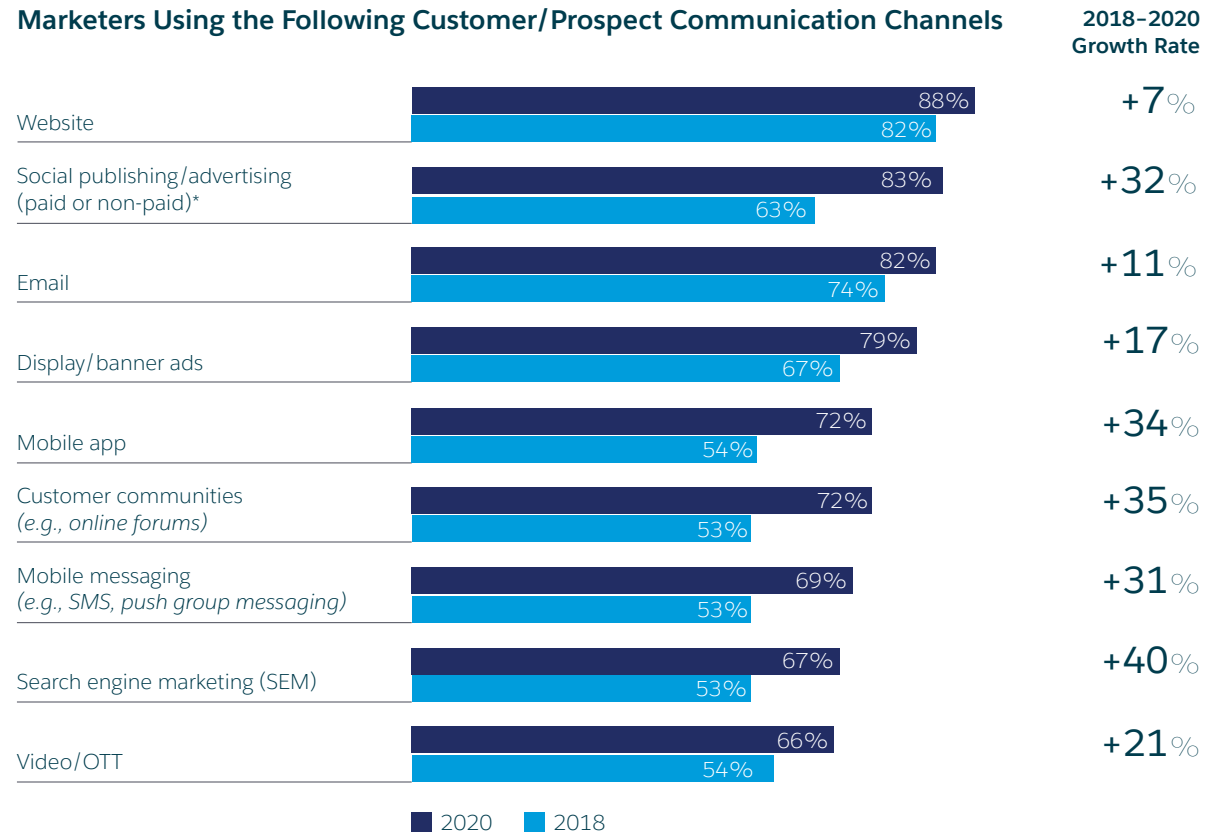
57%
of marketers use **audio**

68%
of marketers use **influencers**



Marketers Continue Expansion Across Digital Channels

Marketers Using the Following Customer/Prospect Communication Channels



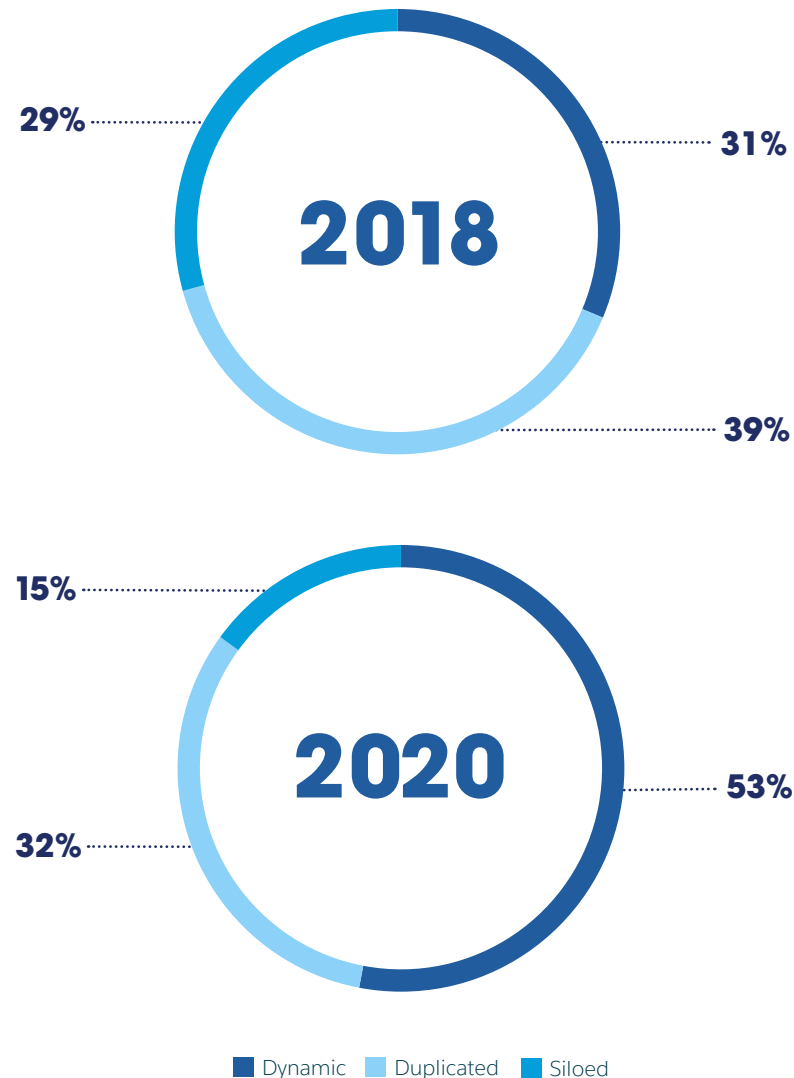
* 2018 adoption rate is the average of social publishing and social advertising, which were distinct survey response options. See page 73 for additional data segmentations.

Customers expect companies to engage with them across channels in a dynamic manner – in which brand messages and content on one channel are tailored based on their actions on another channel. **Case in point: 54% of customers say they get annoyed if they are targeted with an ad for something they've already bought.** With 71% of customers having used multiple channels to start and complete a single transaction, marketers face a vexing challenge.*

Over the past two years, marketers have made great strides in meeting customer expectations for dynamic content across channels. For the first time, more than half of marketers describe their cross-channel content as dynamic – up from less than a third in 2018. The share of marketers with siloed cross-channel content, in which channels have no coordination, dropped from 29% to 15%.

Cross-Channel Marketing Is Catching Up with Customers

Marketers Who Describe Their Cross-Channel Coordination as Follows



See page 74 for additional data segmentations.

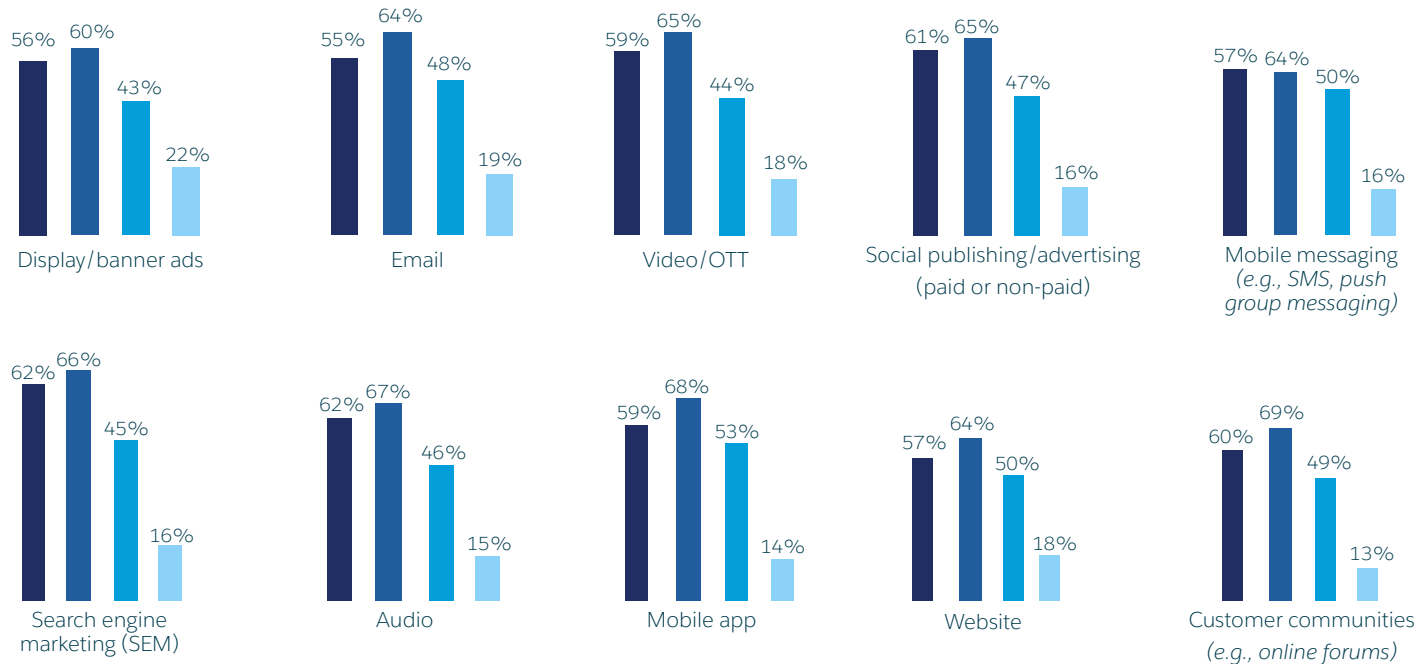
*"State of the Connected Customer," Salesforce Research, June 2019.

Marketing transformation involves more than improved collaboration and additional ways to connect. Over the past year, marketers have taken steps to boost audience segmentation and personalization across their touchpoints. The channel-agnostic nature of today’s customers has made full digital experiences the focus over individual touchpoints. It’s logical, then, that marketers have spread these efforts across their websites, social channels, and mobile properties, among others. Improved in-channel user functionality initiatives, such as headless commerce, are also common. All in all, the majority of marketers are using their channels differently than they were a year ago.

Marketers Are Using Channels in More Sophisticated Ways

How Marketers Have Changed Their Use of Channels over the Past Year

■ Improved audience segmentation
 ■ Improved personalization
 ■ Expanded user functionality
 ■ No change in channel use since last year



See page 75 for additional data segmentations.
 Base: Marketers using the indicated channel.

02 Customer Data Sets the Stage for Empathetic Marketing

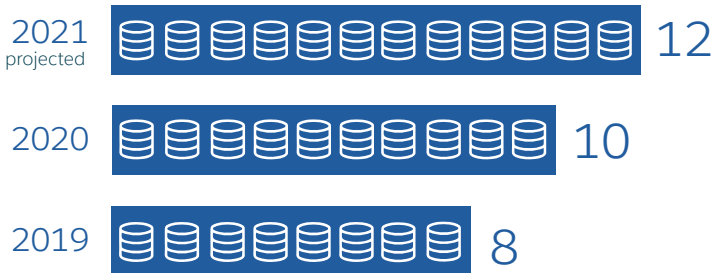
Marketers have long recognized the importance of data in understanding and engaging customers as individuals. But as customers' circumstances and needs evolve rapidly, building a clear understanding of them is nothing short of essential. **Seventy-eight percent of marketers describe their customer engagement as data-driven.**

Marketers expect to turn to an increasing number of data sources moving forward. Transactional data, declared interests and preferences, and known digital identities are particularly popular.

Ranked Popularity of Customer Data Sources

- 1 | Transactional data
- 2 | Declared interests/preferences
- 3 | Known digital identities
- 4 | Offline identities
- 5 | Anonymized digital identities
- 6 | Second-party data
- 7 | Inferred interests/preferences
- 8 | Non-transactional data
- 9 | Third-party data

Median Number of Data Sources Used by Marketers



02 Customer Data Sets the Stage for Empathetic Marketing

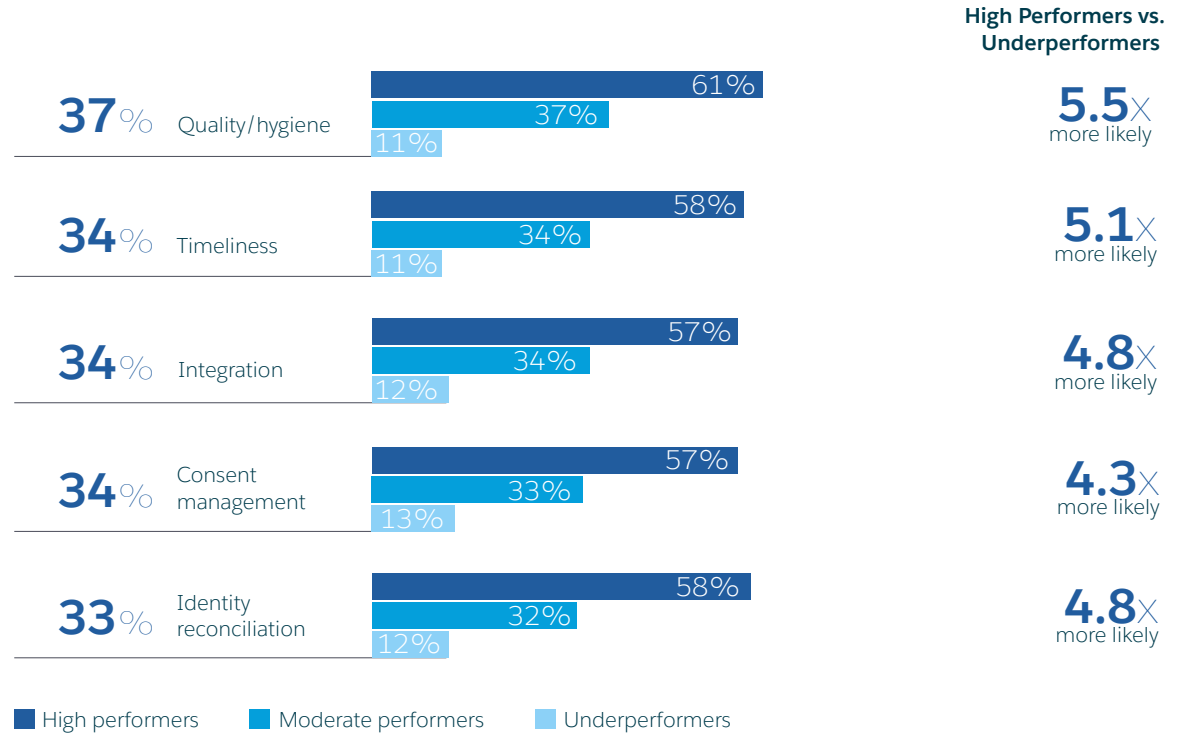
Data, in and of itself, isn't useful. Its impact is realized when the insights it holds are unlocked. And those insights are only valuable if the data is accurate, timely, and permissible to use in the desired manner.

Overall, few marketers are completely satisfied with their customer data, calling into question whether they can use it to its full potential. High-performing marketers – those most satisfied with their investments and outcomes – are far and away more satisfied with their customer data on multiple fronts.

The average enterprise has 900 different applications, an average of only 28% of which are integrated.*

Putting Marketing Data to Work Remains Challenging

Marketers Who Are Completely Satisfied with the Following Aspects of Their Customer Data



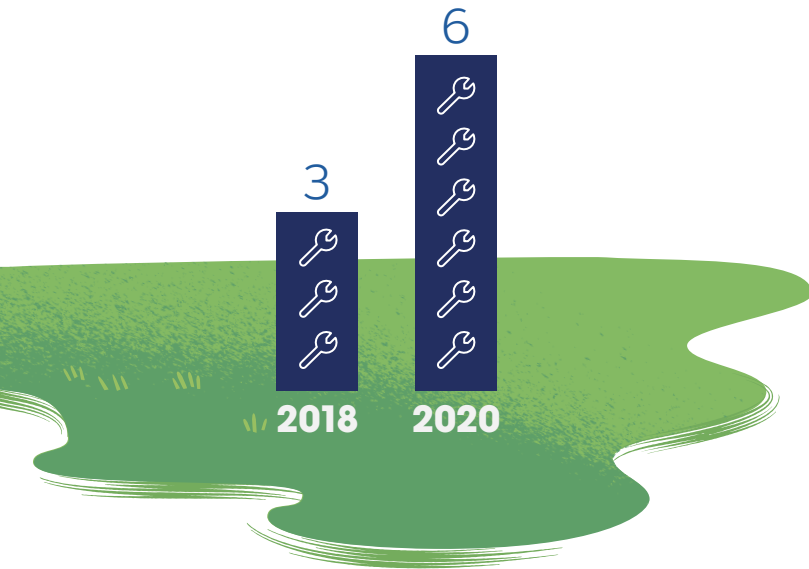
* "Mulesoft Connectivity Benchmark Report," Salesforce Research, February 2020.

02 Customer Data Sets the Stage for Empathetic Marketing

Marketers cite data unification and activation among their top five challenges. Their discontent may be tied to a fragmented data management technology landscape.

As we found in 2018, no clear winner among many competing solutions has emerged. Today, marketers are turning to even more complex combinations of data management technologies to build a cohesive understanding of their customers.

Average Number of Data Management Tools Used



Marketers Continue Their Search for the Right Data Management Solution

Ranked Popularity of Marketing Data Management Solutions

- 1 | Customer relationship management (CRM) platform
- 2 | Email service provider (ESP)
- 3 | Advertising platforms
- 4 | Data management platform (DMP)
- 5 | Customer data platform (CDP)
- 6 | Marketing automation platform
- 7 | Consent management platform
- 8 | Homegrown solution

02 Customer Data Sets the Stage for Empathetic Marketing

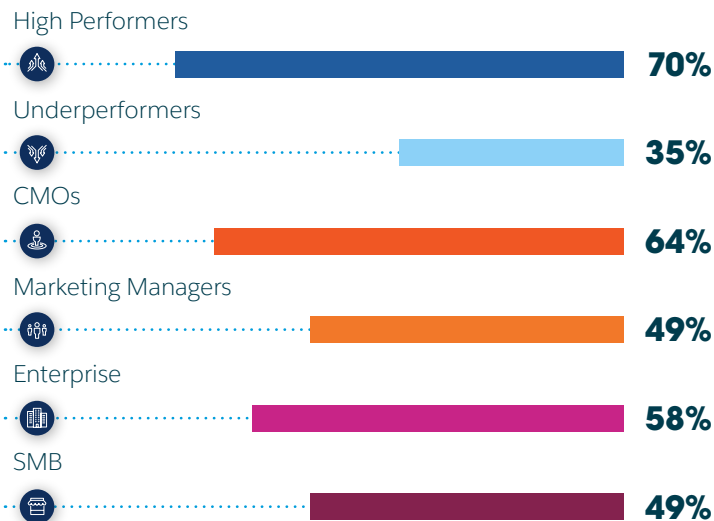
Once data is sourced, integrated, and managed, it's time for it to go to work. Artificial intelligence (AI) is the rising star in this effort, with a whopping 84% of marketers reporting its use – up from 29% in 2018.

Whether this surge in marketers claiming AI use is due to net new adoption or increased knowledge of the role AI has played all along is unknown. In any event, marketers are turning to AI for various use cases, with personalization, segmentation, and deep data insights being particularly popular. **Marketers with AI have an average of seven use cases, up from six in 2018.**

Top AI Use Cases in Marketing

- 1 | Personalized experiences in individual channels
- 2 | Improved customer segmentation/lookalike modeling
- 3 | Surfaced insights from data
- 4 | Drive next best actions (e.g., offers)
- 5 | Automated customer interactions

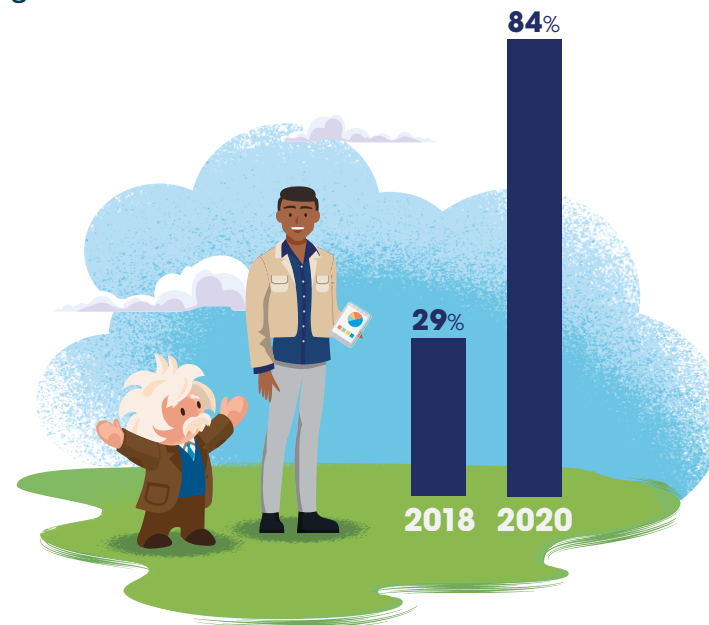
Marketers Claiming a Fully Defined AI Strategy



See pages 78 and 79 for additional data segmentations.

Use of AI in Marketing Has Surged

Marketers Reporting AI Use



Spotlight

Privacy Initiatives Stem from More Than Regulations

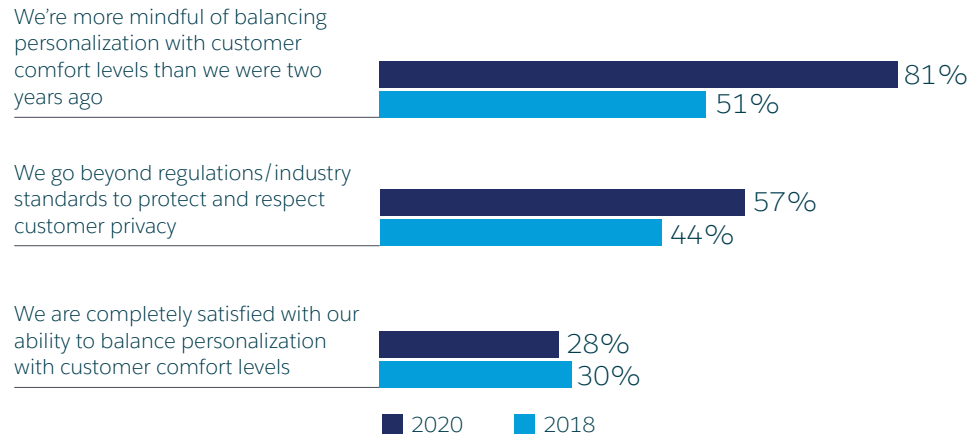
Today, customer trust is built in no small part through empathy, but privacy remains a critical part of the equation. As such, marketers are taking steps to not just comply with regulations like GDPR, but exceed them.

58% of customers are comfortable with their data being used transparently, but only 63% say companies are generally transparent about how their data is used.*

As marketers raise their standards for data stewardship, their satisfaction in their performance has decreased slightly, and a divide between top marketers and the rest has emerged. **Fifty-six percent of high performers are completely satisfied with their ability to balance personalization with customer comfort, versus 4% of underperformers.**

Marketers Take Stock of Rising Privacy Standards

Marketers Who Agree with the Following



See page 84 for additional data segmentations.
* "State of the Connected Customer," Salesforce Research, June 2019.

03 Marketers Double Down on Business Value

The definition of marketing success is evolving as customer experience, joins business value as the profession's north star. In addition to tried-and-true KPIs like revenue growth and sales effectiveness, marketers are increasingly embracing customer satisfaction metrics, as well as associated signs of success such as referral rates and customer lifetime value (LTV).

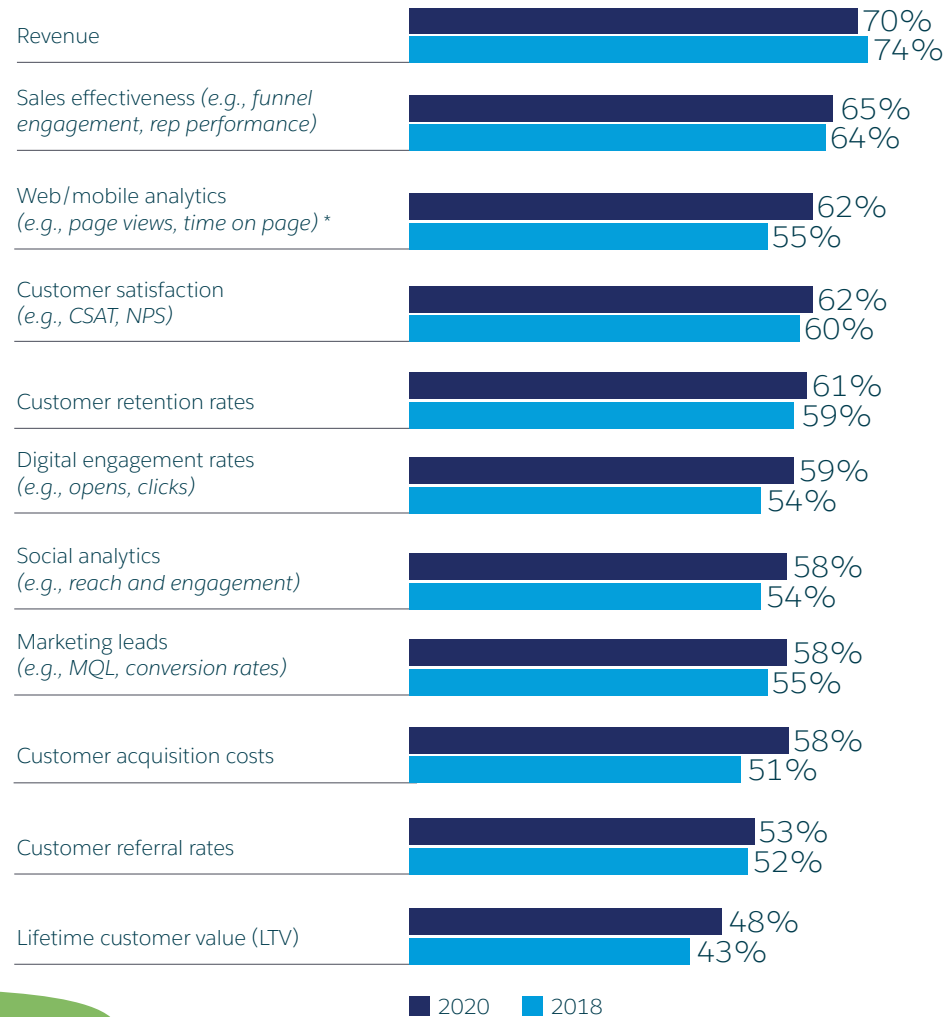
As touchpoints multiply and attention spans shorten, marketers are also delving deeper into web and mobile analytics, social analytics, and digital engagement metrics.

72% of high performers can analyze performance in real time, versus 49% of underperformers.



Marketers Slowly Expand Their KPIs

Marketers Who Track the Following Metrics



See pages 80, 81, and 82 for additional data segmentations.
* Web analytics and mobile analytics were distinct categories in 2018.

03 Marketers Double Down on Business Value

Marketers aren't just tacking on metrics – they are being more strategic about where in the customer journey to scrutinize them. For branding building purposes, for example, marketers are less focused on generating leads and more concerned about showcasing customer satisfaction. Customer acquisition cost analysis is supplementing more traditional lead generation and acquisition metrics, and referrals play an outsized role in retention and advocacy.

Most Valuable Metrics by Customer Journey Stage



Base: Marketers tracking the indicated metric.

↑: Increase in ranking from 2018

↓: Decrease in ranking from 2018

↔: No change since 2018

03 Marketers Double Down on Business Value

Similar to metrics, the relative value of engagement channels shifts as customers move across their journeys. Websites – the front door of any brand – are valued across each stage, as are traffic drivers such as email and social. Customer communities, either owned or third-party, continue as the favorite medium for acquisition, retention, and advocacy, and have also surged in popularity during the brand building stage. Despite their status as relative newcomers to the marketing world, influencers now make an appearance among the five most valuable channels for any stage.

Most Valuable Channels by Customer Journey Stage

	 Brand Building	 Lead Generation	 Customer Acquisition	 Upselling	 Customer Retention	 Customer Advocacy					
1 ↔	Website	N/A	Influencer	↔	Customer communities	↔	Website	↔	Customer communities	↔	Customer communities
2 N/A	Influencer	↔	Social publishing/ advertising	↑1	Social publishing/ advertising	↔	Email	↔	Email	↔	Website
3 ↓1	Social publishing/ advertising	↓2	Website	N/A	Influencer	N/A	Influencer	↔	Website	↑1	Email
4 ↑3	Email	↑1	Email	↓2	Website	↓1	Social publishing/ advertising	↔	Social publishing/ advertising	N/A	Influencer
5 ↔	Customer communities	↓1	Search engine marketing (SEM)	↓1	Email	↓1	Customer communities	↔	Mobile app	↓2	Social publishing/ advertising

Base: Marketers using the indicated channel. ↑: Increase in ranking from 2018 ↓: Decrease in ranking from 2018 ↔: No change since 2018 N/A : Not included in 2018 survey Salesforce Research

Account-Based Marketing Becomes Standard in B2B Organizations

Customers expect empathy, tailored engagement, and value regardless of whether they're buying for themselves or on behalf of their employers. **Eighty-two percent of high performers say B2B and B2C marketing tactics are converging, versus 67% of underperformers.**

Account-based marketing (ABM) programs are B2B marketers' response to elevated business buyer expectations, and represent a new level of collaboration with sales teams. **Eighty-nine percent of B2B marketers have an ABM program.***

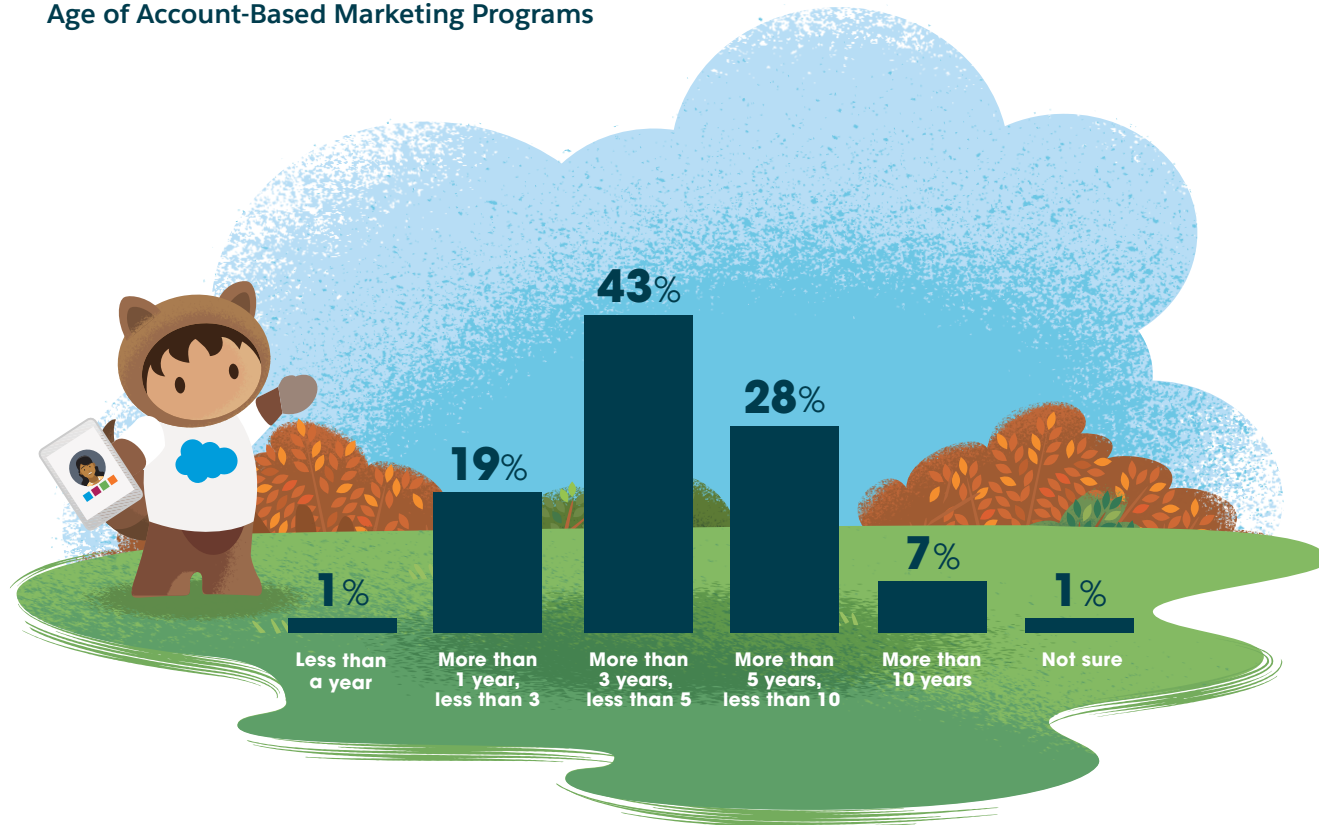
High-performing B2B marketers dedicate 18% of budgets to ABM, versus 14% for underperformers.

ABM programs are a relatively new phenomenon – 64% of them were started within the past five years – but have quickly grown more sophisticated. **Sixty-eight percent of ABM programs use automation.***

* Includes B2B2C marketers.

Account-Based Marketing Programs Reach Maturity

Age of Account-Based Marketing Programs



Base: B2B and B2B2C marketers with an ABM program.

The Next Decade of Marketing Innovation

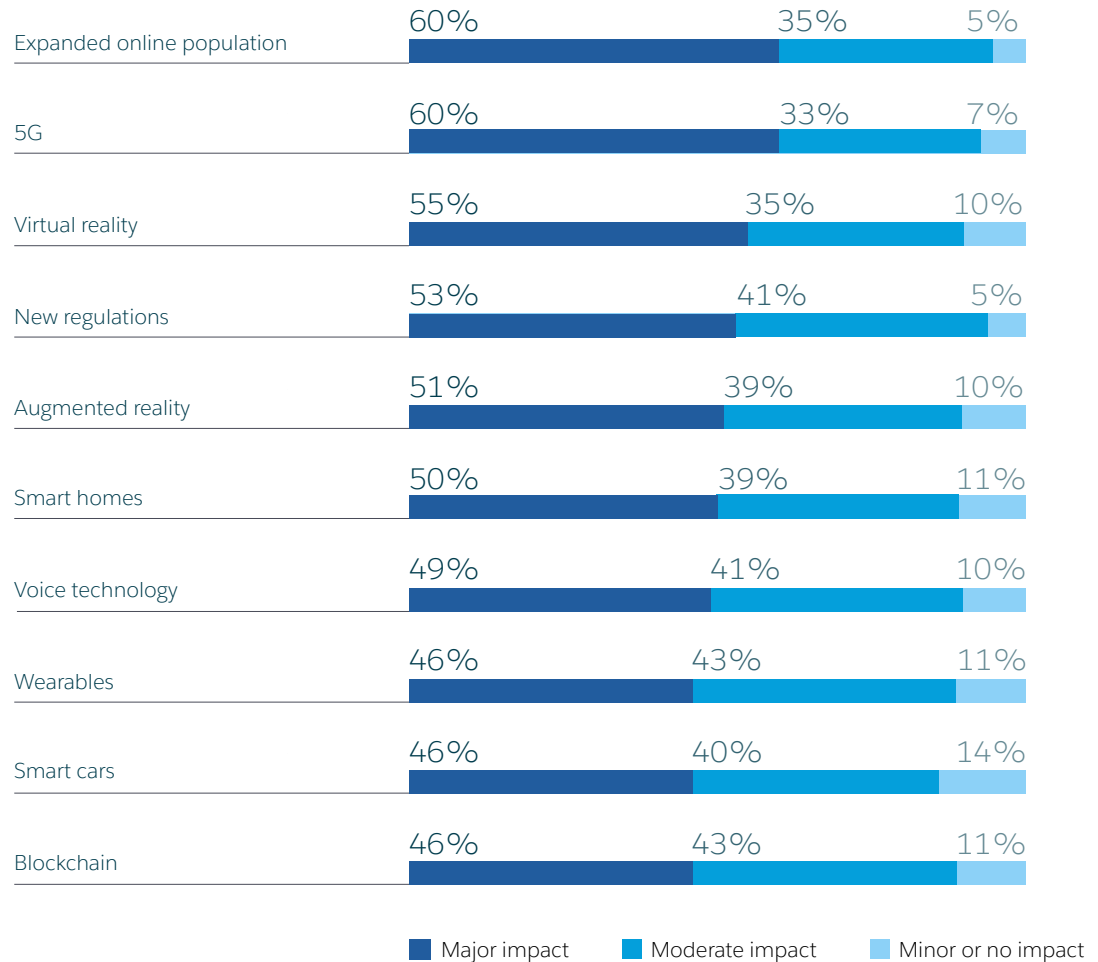
At the time of this writing, marketers – along with the rest of the world – are facing a crisis. But as time goes on, business will recover, confidence will increase, and a newfound appreciation for innovation will take root. Marketers expect the next 10 years to bring transformational impacts from new technologies and societal developments.

From a technological standpoint, marketers expect 5G wireless networks to have the greatest impact on their work over the next 10 years. However, nothing more is anticipated than the new customers and prospects brought online as digital life permeates the global population even more than now.

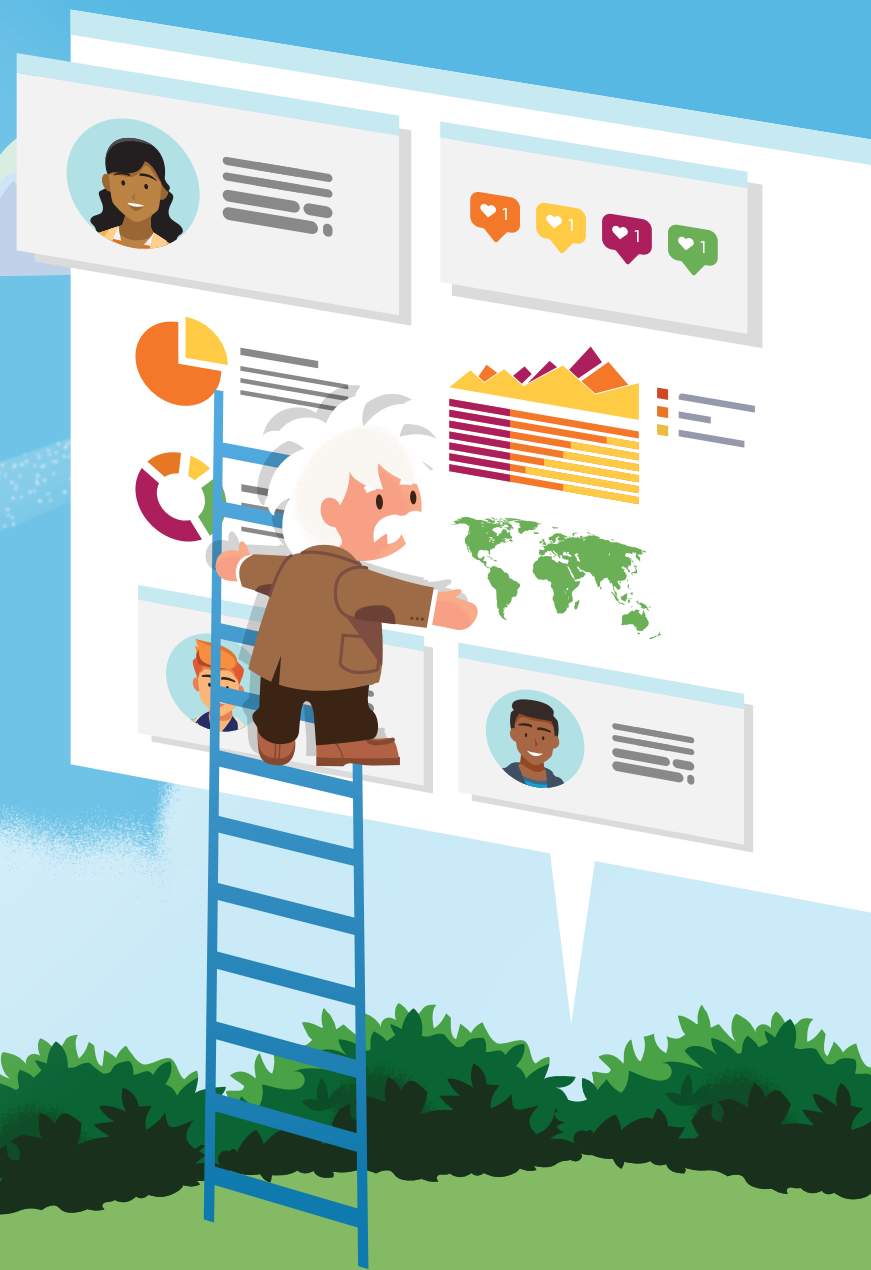
76% of high performers say they do a great job at innovating marketing technology, tactics, and strategies, versus 47% of underperformers.

Technology, Legislation, and Societal Shifts Set to Further Transform Marketing

Degree of Impact on Marketing Expected from the Following over the Next Decade



COUNTRY PROFILES



* Please keep in mind that cultural bias impacts survey results across regions.

Country Profile

Australia/New Zealand (300 marketing professionals)

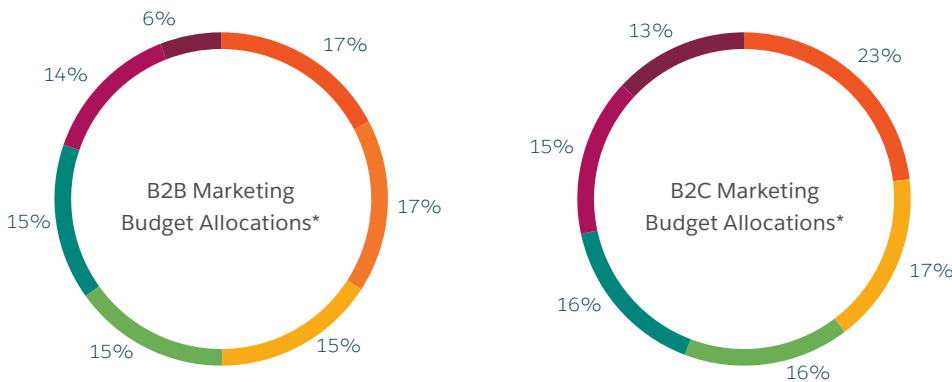
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Improving marketing ROI/attribution
- 3** Balancing personalization with customer comfort levels

Marketers' Top Challenges

- 1** Insufficient organizational structure and processes
- 2** Sharing a unified view of customer data across business units
- 3** Engaging with customers in real time



- Technology
- People
- Research
- Other
- Account-based marketing
- Advertising
- Content

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Sales effectiveness AND Customer referral rates (tie)
- 3** Marketing leads

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize individual channel experiences
- 2** Programmatic advertising and media buying
- 3** Resolve customer identity



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Augmented reality
- 3** Virtual reality AND Expanding online population (tie)

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Belgium (200 marketing professionals)

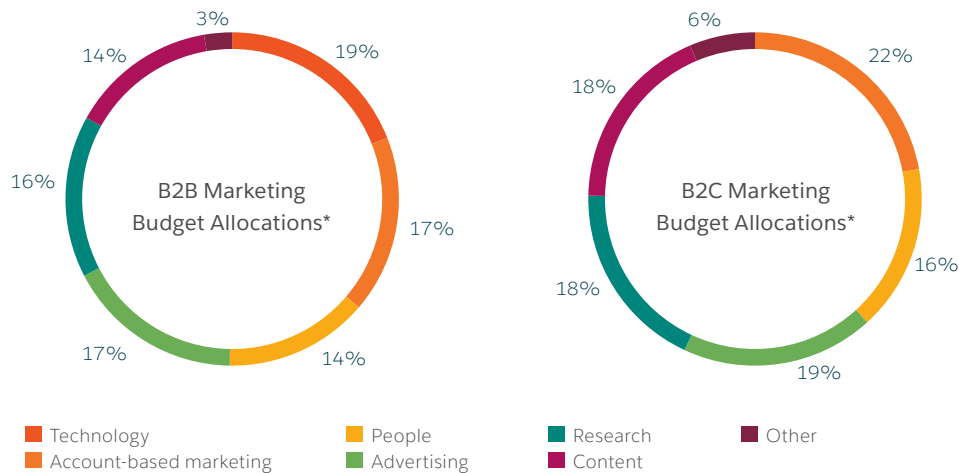
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Modernizing tools and technologies
- 3** Hiring or developing talent

Marketers' Top Challenges

- 1** Insufficient organizational structure and processes
- 2** Engaging customers in real time
- 3** Creating cohesive customer journeys across channels and devices



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize individual channel experiences AND Bridge online and offline experiences (*tie*)
- 2** (Not explicitly labeled with a number in the image)
- 3** Surface data insights



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer satisfaction
- 2** Web/mobile analytics AND Social analytics (*tie*)

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** New regulations
- 3** Expanding online population

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Brazil (300 marketing professionals)

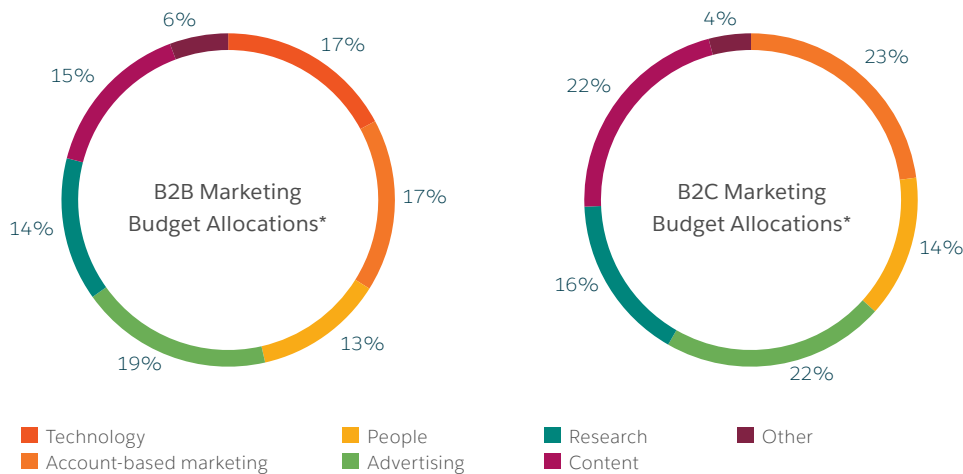
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Modernizing tools and technologies
- 3** Engaging customers in real time

Marketers' Top Challenges

- 1** Engaging customers in real time
- 2** Innovating
- 3** Unifying customer data sources



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Automate customer interactions over social channels or messaging apps
- 2** Drive next best actions in real time
- 3** Personalize individual channel experiences



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** Wearables

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Canada (300 marketing professionals)

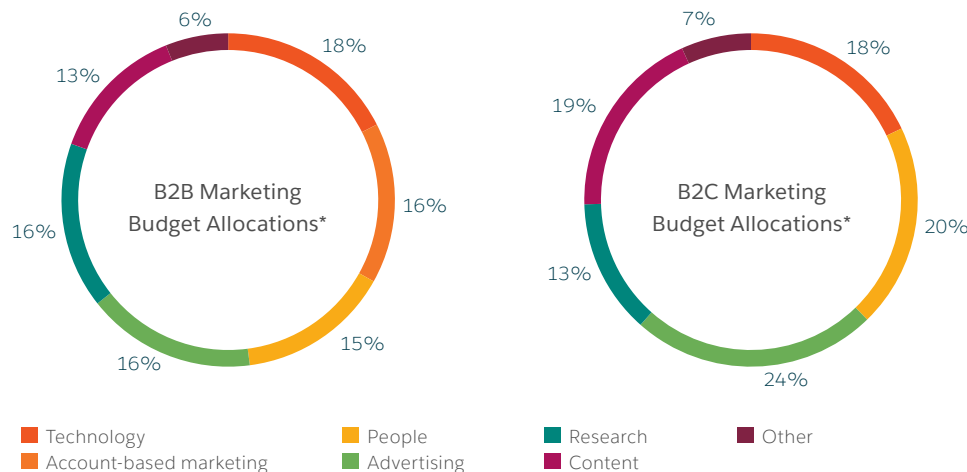
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Complying with privacy regulations
- 2** Innovating
- 3** Unifying customer data sources

Marketers' Top Challenges

- 1** Insufficient organizational structure and processes
- 2** Innovating
- 3** Insufficient human resources AND Creating cohesive customer journeys across channels and devices (*tie*)



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Surface data insights
- 2** Personalize individual channel experiences
- 3** Personalize the overall customer journey



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Digital engagement rates
- 3** Sales effectiveness

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** 5G
- 3** New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

France (300 marketing professionals)

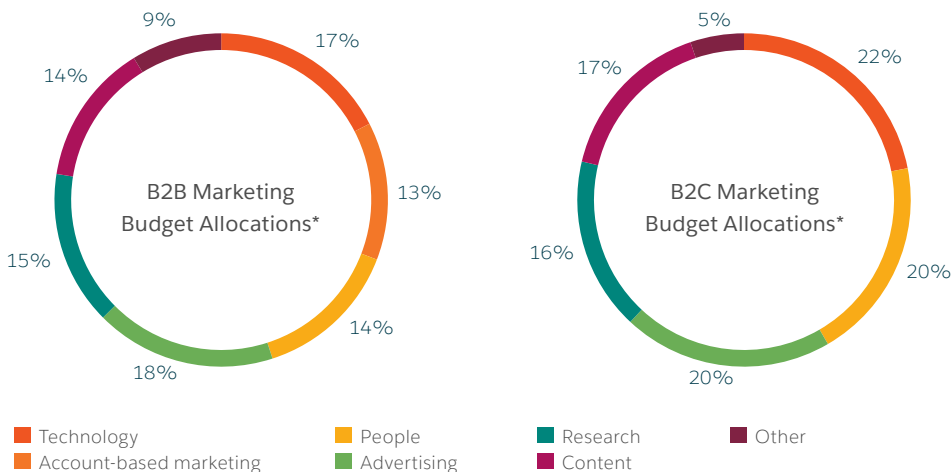
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Engaging customers in real time
- 2 Innovating
- 3 Modernizing tools and technologies

Marketers' Top Challenges

- 1 Engaging customers in real time
- 2 Innovating
- 3 Creating cohesive customer journeys across channels and devices



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Drive next best actions in real time
- 2 Personalize the overall customer journey
- 3 Improve customer segmentation/lookalike modeling AND Personalize individual channel experiences (tie)



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Sales effectiveness
- 2 Revenue
- 3 Campaign ROI

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Voice technology
- 3 Smart homes

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Germany (300 marketing professionals)

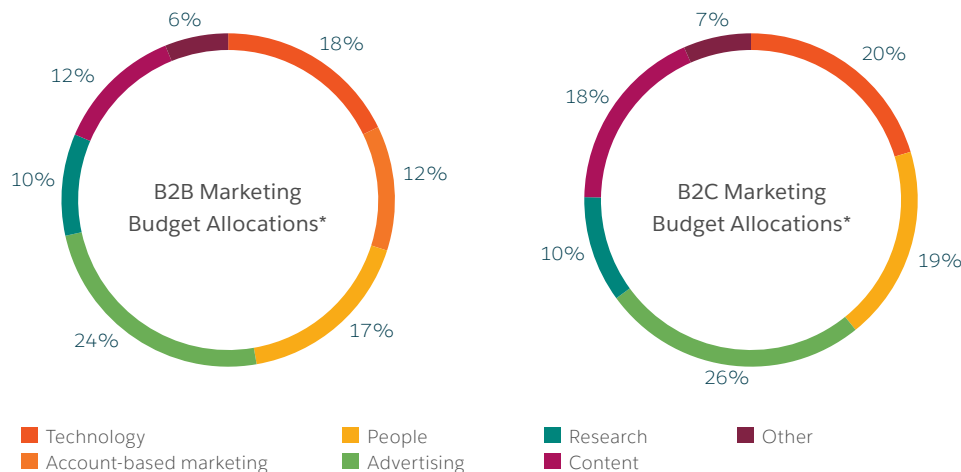
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Complying with privacy regulations
- 2 Engaging customers in real time
- 3 Innovating

Marketers' Top Challenges

- 1 Complying with privacy regulations
- 2 Innovating
- 3 Budgetary constraints



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Surface data insights
- 2 Drive next best actions in real time AND Personalize the overall customer journey AND Programmatic advertising and media buying (tie)



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Web/mobile analytics
- 3 Customer satisfaction

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Hong Kong (200 marketing professionals)

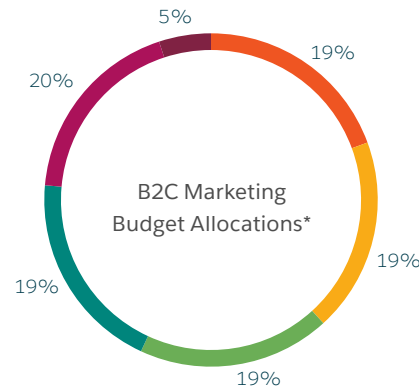
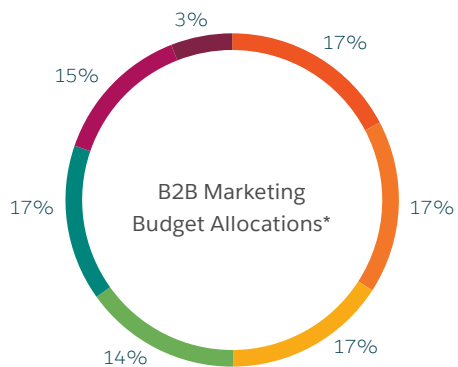
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Engaging customers in real time
- 2 Improving marketing ROI/attribution
- 3 Modernizing tools and technologies

Marketers' Top Challenges

- 1 Measuring marketing ROI/attribution
- 2 Ineffective use of tools and technologies
- 3 Budgetary constraints



- Technology
- Account-based marketing
- Advertising
- People
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Web/mobile analytics
- 3 Social analytics AND Sales effectiveness (tie)

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Programmatic advertising and media buying
- 2 Personalize individual channel experiences
- 3 Improve customer segmentation/lookalike audience modeling



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Virtual reality
- 3 Augmented reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

India (300 marketing professionals)

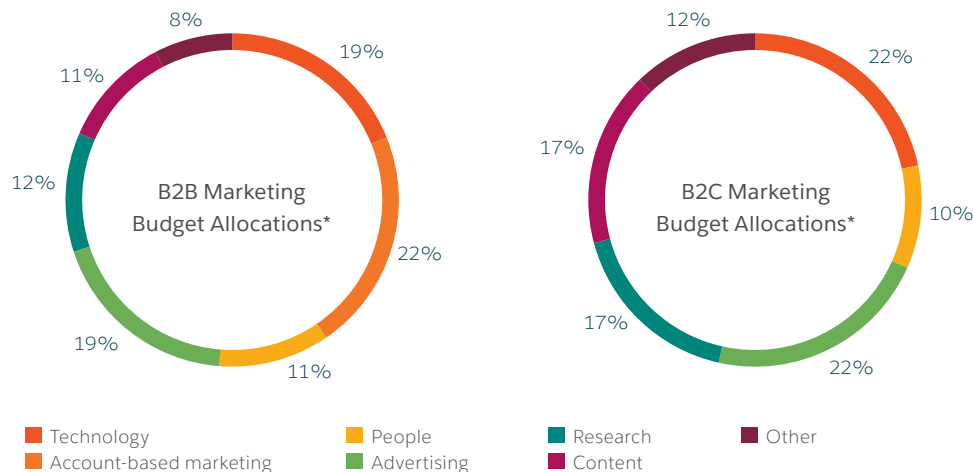
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Engaging customers in real time
- 3** Improving marketing ROI/attribution

Marketers' Top Challenges

- 1** Insufficient organizational structure and processes
- 2** Sharing a unified view of customer data across business units
- 3** Creating cohesive customer journeys across channels and devices



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Programmatic advertising and media buying
- 2** Bridge online and offline experiences
- 3** Improve customer segmentation/lookalike audience modeling



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Marketing leads
- 2** Social analytics
- 3** Sales effectiveness

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** Augmented reality
- 3** Voice technology

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Ireland (200 marketing professionals)

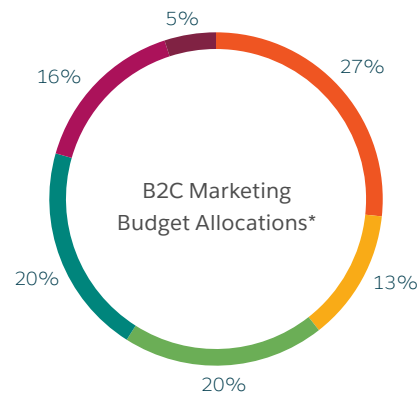
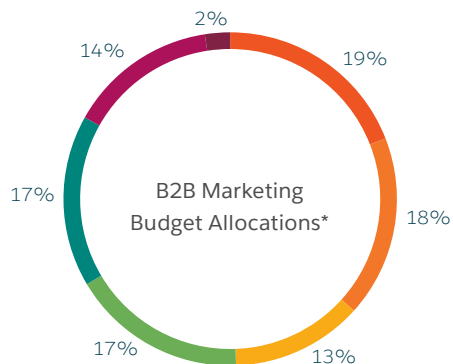
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Creating cohesive customer journeys across channels and devices
- 2 Improving marketing ROI/attribution
- 3 Unifying customer data sources AND Innovating (tie)

Marketers' Top Challenges

- 1 Engaging customers in real time
- 2 Creating cohesive customer journeys across channels and devices
- 3 Insufficient organizational structure and processes



- Technology
- Account-based marketing
- Advertising
- People
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Customer satisfaction
- 2 Digital engagement rates
- 3 Revenue

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Personalize the overall customer journey
- 2 Drive next best actions in real time AND Improve customer segmentation/lookalike audience modeling (tie)



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Israel (150 marketing professionals)

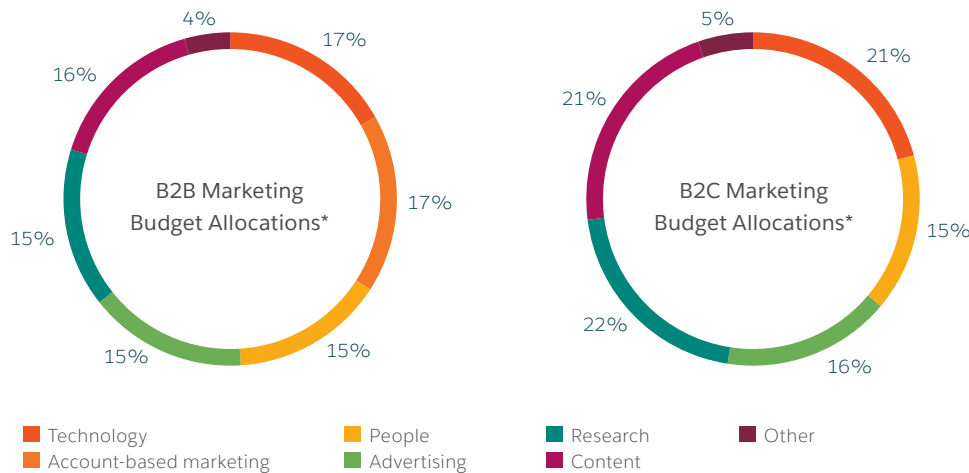
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Unifying customer data sources **AND** Innovating *(tie)*
- 3** Increasing budgets

Marketers' Top Challenges

- 1** Insufficient organizational structure and processes
- 2** Engaging customers in real time **AND** Creating cohesive customer journeys across channels and devices *(tie)*



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Automate customer interactions over social channels or messaging apps
- 2** Bridge online and offline experiences
- 3** Drive next best actions in real time **AND** Improve customer segmentation/lookalike audience modeling *(tie)*



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer satisfaction
- 2** Digital engagement rates **AND** Customer referral rates *(tie)*

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** New regulations
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Italy (300 marketing professionals)

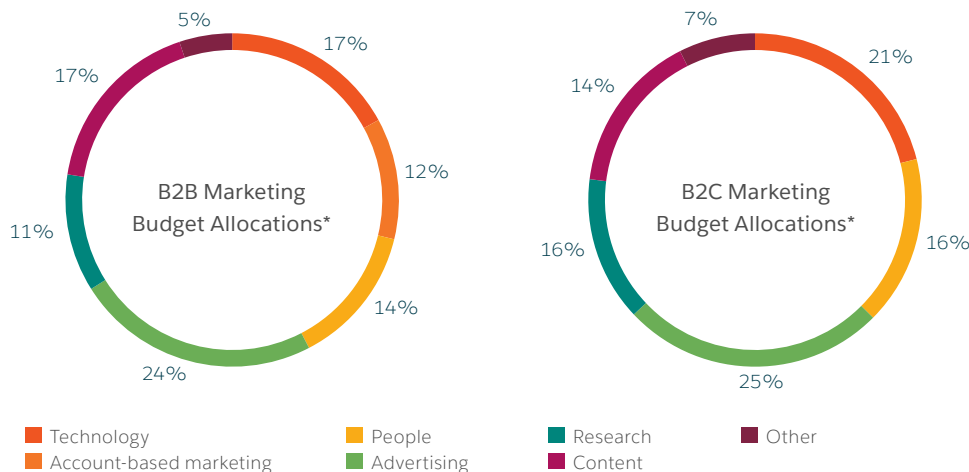
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Complying with privacy regulations
- 3** Improving our use of tools and technologies

Marketers' Top Challenges

- 1** Innovating
- 2** Engaging customers in real time
- 3** Complying with privacy regulations



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize the overall customer journey
- 2** Surface data insights
- 3** Drive next best actions in real time



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Customer retention rates

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** Virtual reality AND 5G (tie)

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Japan (300 marketing professionals)

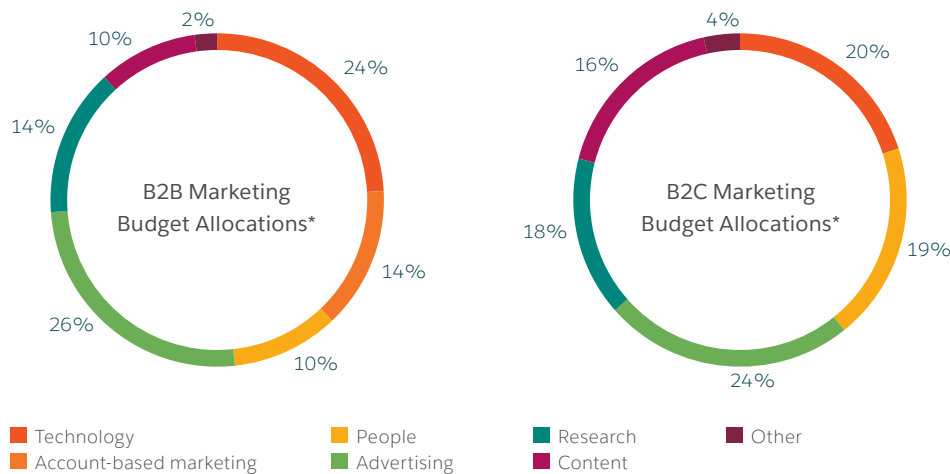
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Hiring or developing talent
- 2** Sharing a unified view of customer data across business units
- 3** Innovating

Marketers' Top Challenges

- 1** Engaging customers in real time
- 2** Sharing a unified view of customer data across business units AND Balancing personalization with customer comfort levels (*tie*)



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Surface data insights
- 2** Drive next best actions in real time
- 3** Improve customer segmentation/lookalike audience modeling



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Customer retention rates
- 3** Customer satisfaction

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** Augmented reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Mexico (200 marketing professionals)

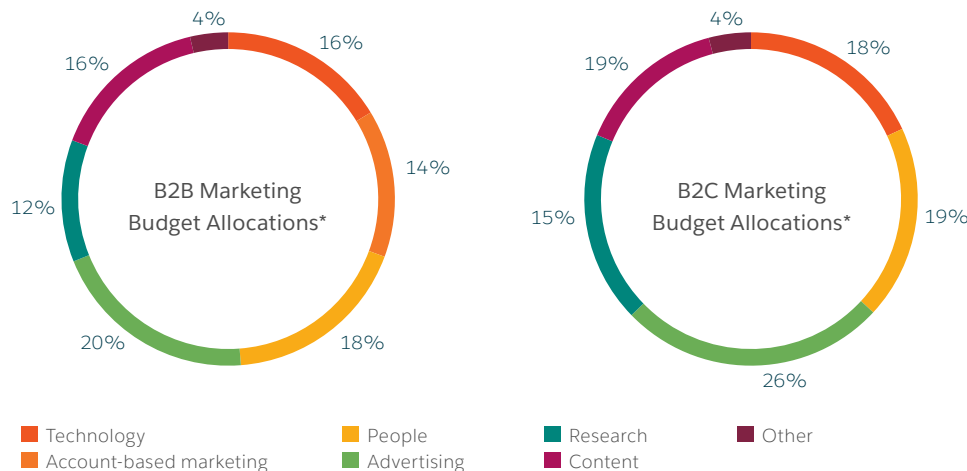
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Modernizing tools and technologies
- 3** Improving our use of tools and technologies **AND** Engaging customers in real time (*tie*)

Marketers' Top Challenges

- 1** Innovating
- 2** Engaging customers in real time
- 3** Measuring marketing ROI/attribution



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Drive next best actions in real time
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Programmatic advertising and media buying



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Marketing leads
- 3** Sales effectiveness

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Virtual reality
- 3** Expanded online population

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Netherlands (300 marketing professionals)

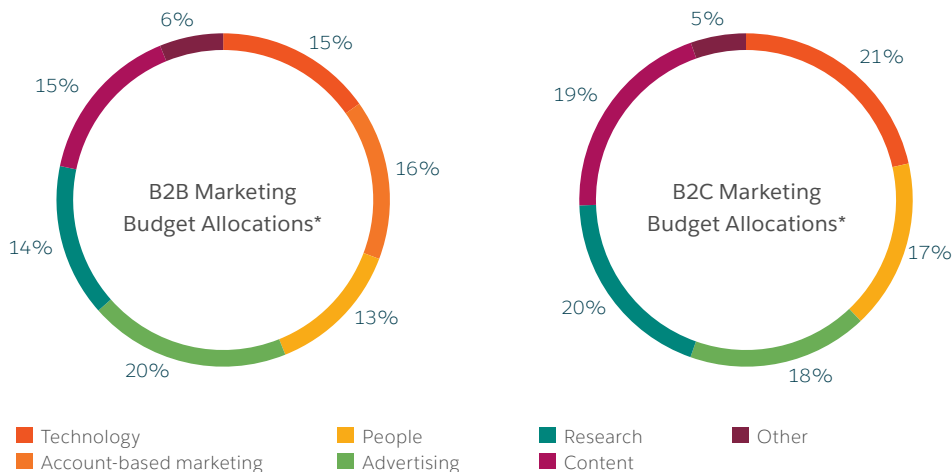
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating AND Complying with privacy regulations (*tie*)
- 3** Creating cohesive customer journeys across channels and devices

Marketers' Top Challenges

- 1** Engaging customers in real time AND Creating cohesive customer journeys across channels and devices (*tie*)
- 3** Complying with privacy regulations



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Automate customer interactions over social channels or messaging apps
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Personalize individual channel experiences



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Social analytics
- 3** Digital engagement rates

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Augmented reality
- 2** New regulations
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Nordics (300 marketing professionals)

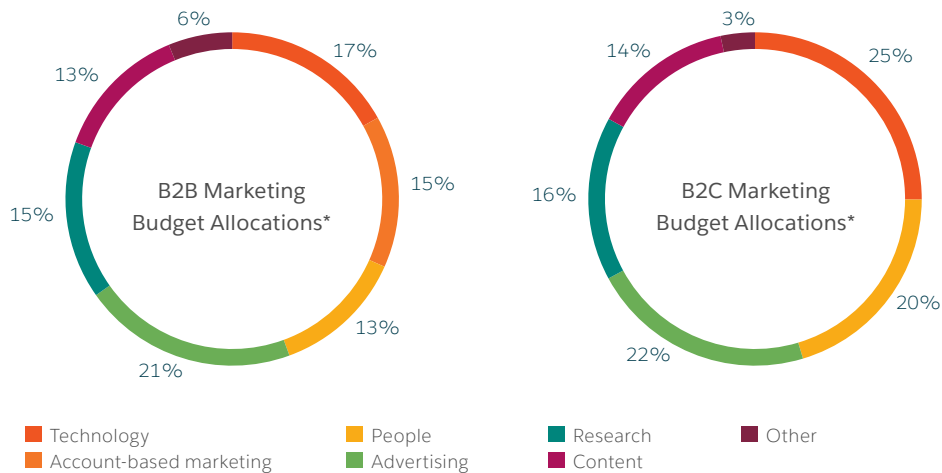
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Improving our use of tools and technologies
- 3 Balancing personalization with customer comfort levels

Marketers' Top Challenges

- 1 Insufficient organizational structure and processes
- 2 Innovating
- 3 Insufficient human resources



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Programmatic advertising and media buying
- 2 Personalize individual channel experiences
- 3 Bridge online and offline experiences



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Digital engagement rates
- 2 Web/mobile analytics
- 3 Sales effectiveness

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Virtual reality
- 2 New regulations
- 3 Expanded online population

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Philippines (200 marketing professionals)

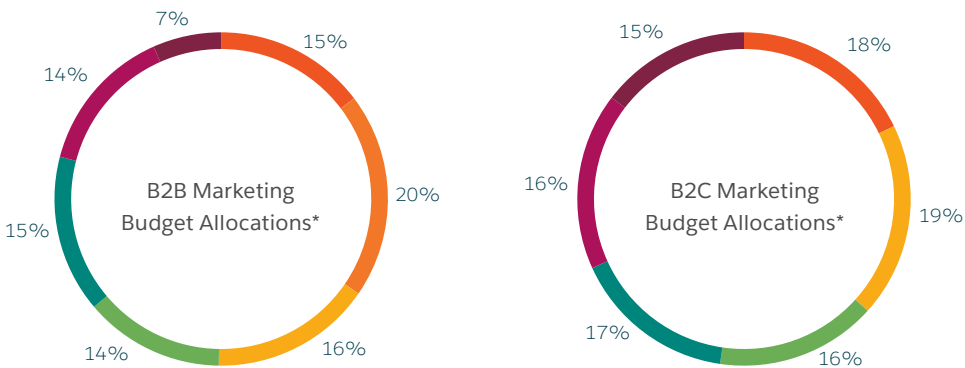
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Improving our use of tools and technologies
- 2** Increasing budgets
- 3** Revamping organizational structure and processes

Marketers' Top Challenges

- 1** Unifying customer data sources
- 2** Sharing a unified view of customer data across business units
- 3** Insufficient organizational structure and processes



- Technology
- People
- Research
- Other
- Account-based marketing
- Advertising
- Content

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer satisfaction
- 2** Revenue
- 3** Customer retention rates

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Improve customer segmentation/lookalike audience modeling
- 2** Personalize the overall customer journey
- 3** Resolve customer identity AND Surface data insights (tie)



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Virtual reality
- 2** Voice technology
- 3** New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Poland (300 marketing professionals)

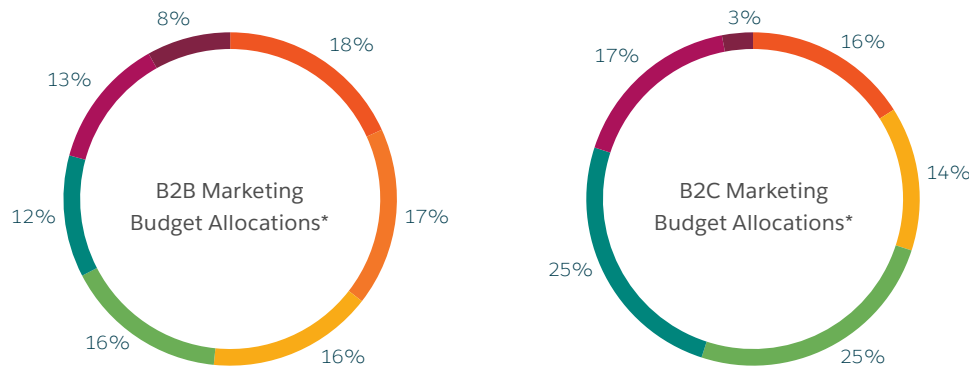
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Complying with privacy regulations
- 2 Innovating
- 3 Engaging customers in real time

Marketers' Top Challenges

- 1 Budgetary constraints
- 2 Engaging customers in real time
- 3 Complying with privacy regulations



Technology, Account-based marketing, People, Advertising, Research, Content, Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Sales effectiveness
- 3 Campaign ROI

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Personalize individual channel experiences
- 2 Drive next best offers in real time
- 3 Improve customer segmentation/lookalike audience modeling



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 Virtual reality
- 3 5G

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Singapore (200 marketing professionals)

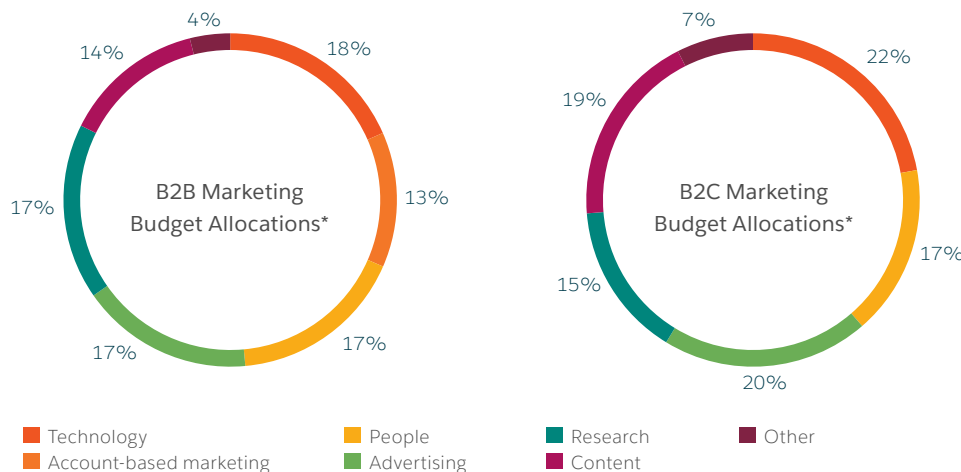
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Unifying customer data sources
- 3** Sharing a unified view of customer data across business units

Marketers' Top Challenges

- 1** Engaging customers in real time
- 2** Unifying customer data sources **AND** Creating cohesive customer journeys across channels and devices (*tie*)



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers

- 2019** **8** data sources
- 2020** **10** data sources
- 2021** **12** projected data sources

Marketers' Top AI Use Cases

- 1** Surface data insights
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Programmatic advertising and media buying



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Customer retention rates **AND** Channel ROI (*tie*)

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

South Africa (200 marketing professionals)

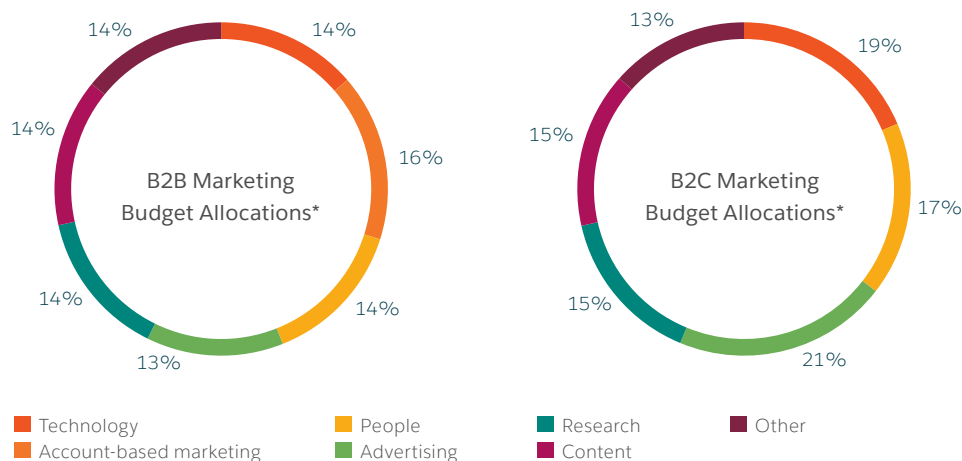
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating **AND** Sharing a unified view of customer data across business units **AND** Modernizing tools and technologies *(tie)*

Marketers' Top Challenges

- 1** Unifying customer data sources
- 2** Balancing personalization with customer comfort levels
- 3** Innovating



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Web/mobile analytics
- 2** Campaign ROI
- 3** Sales effectiveness

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Drive next best actions in real time
- 2** Personalize individual channel experiences
- 3** Improve customer segmentation/lookalike audience modeling



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** New regulations **AND** Expanded online population *(tie)*
- 2** AI
- 3** Wearables

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

South Korea (200 marketing professionals)

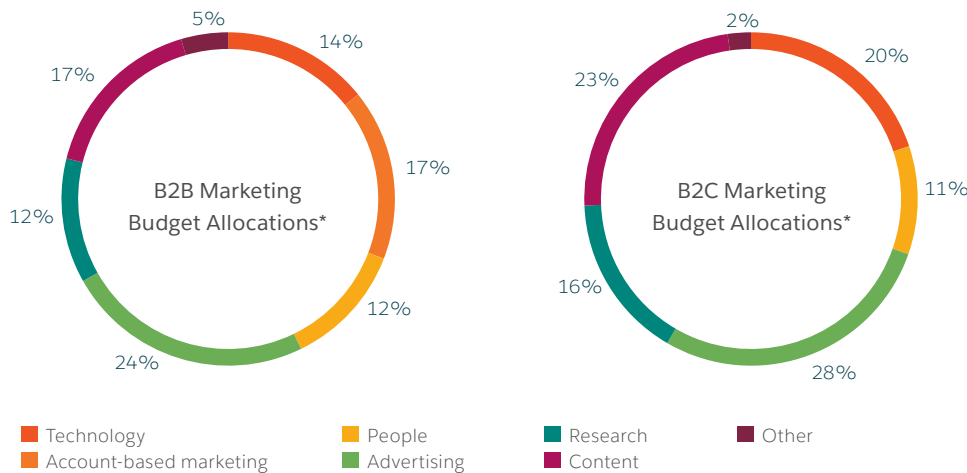
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Engaging customers in real time
- 3** Improving marketing ROI/attribution

Marketers' Top Challenges

- 1** Balancing personalization with customer comfort levels
- 2** Innovating **AND** Engaging customers in real time *(tie)*



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Bridge online and offline experiences
- 2** Programmatic advertising and media buying **AND** Surface data insights *(tie)*



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer retention rates
- 2** Revenue
- 3** Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Virtual reality **AND** Expanded online population *(tie)*
- 3** 5G

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Spain (300 marketing professionals)

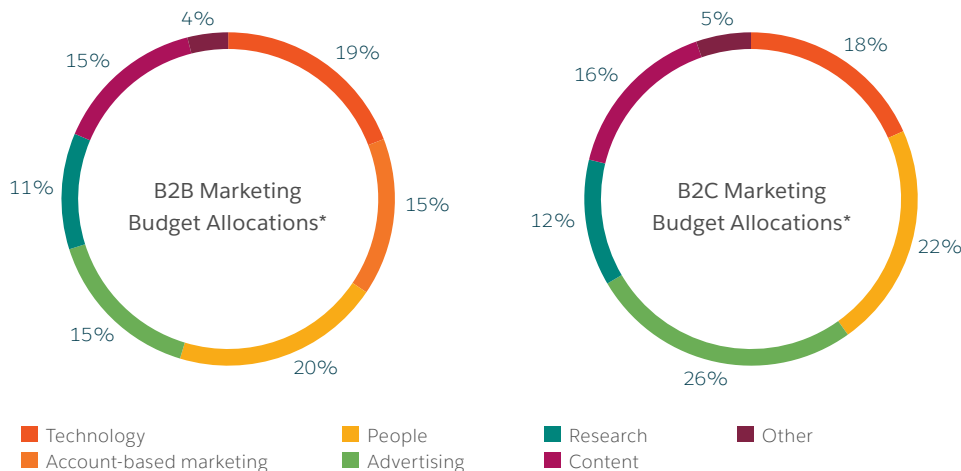
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Complying with privacy regulations
- 2 Innovating
- 3 Engaging customers in real time

Marketers' Top Challenges

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1 Surface data insights
- 2 Improve customer segmentation/lookalike audience modeling
- 3 Drive next best actions in real time



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Sales effectiveness
- 3 Campaign ROI

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Smart homes
- 3 Smart cars

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Switzerland (200 marketing professionals)

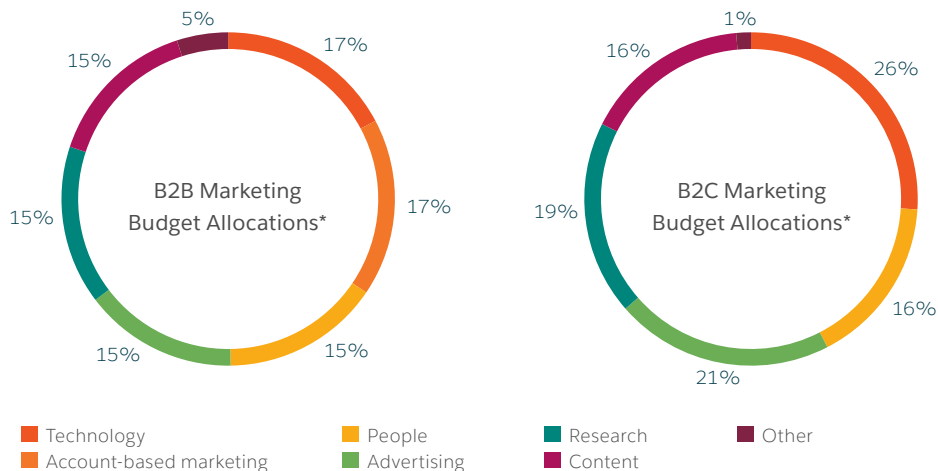
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Engaging customers in real time
- 3** Sharing a unified view of customer data across business units

Marketers' Top Challenges

- 1** Creating cohesive customer journeys across channels and devices
- 2** Engaging customers in real time
- 3** Insufficient organizational structure and processes



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize individual channel experiences
- 2** Automate customer interactions over social channels or messaging apps
- 3** Drive next best actions in real time



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer retention rates
- 2** Customer satisfaction
- 3** Revenue

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** Voice technology AND Wearables AND Virtual reality (tie)

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

Thailand (200 marketing professionals)

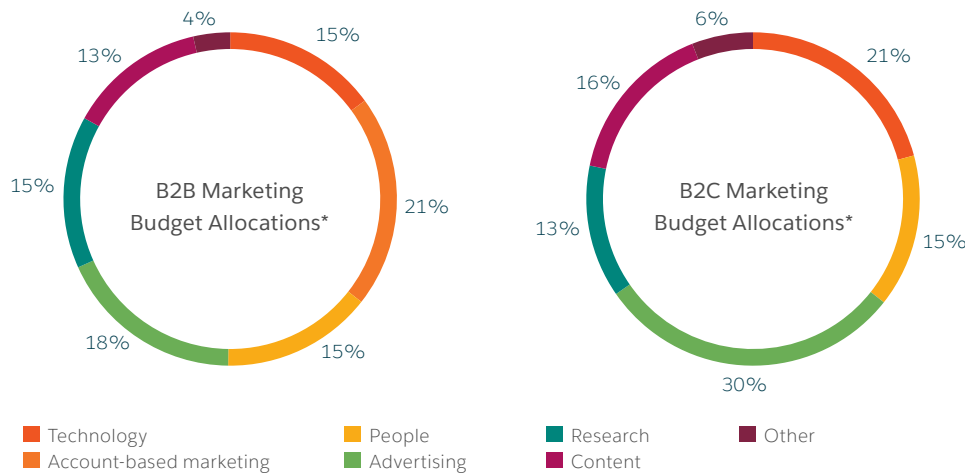
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Creating cohesive customer journeys across channels and devices
- 3** Improving our use of tools and technologies

Marketers' Top Challenges

- 1** Innovating
- 2** Engaging customers in real time
- 3** Creating cohesive customer journeys across channels and devices



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Drive next best actions in real time
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Automate customer interactions over social channels or messaging apps AND Bridge online and offline experiences (tie)



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Sales effectiveness
- 2** Revenue
- 3** Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

United Arab Emirates (200 marketing professionals)

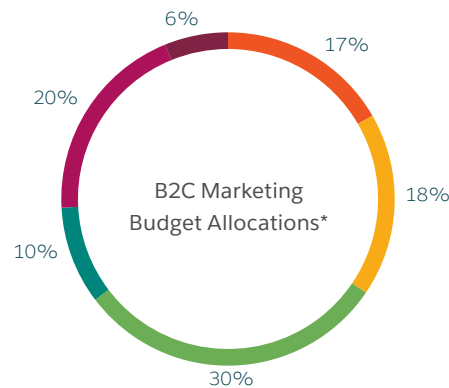
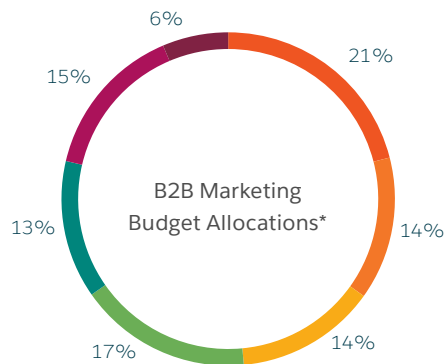
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Hiring or developing talent **AND** Engaging customers in real time (*tie*)
- 2** Improving our use of tools and technologies **AND** Improving marketing ROI/attribution (*tie*)
- 3** Improving our use of tools and technologies **AND** Improving marketing ROI/attribution (*tie*)

Marketers' Top Challenges

- 1** Measuring marketing ROI/attribution
- 2** Complying with privacy regulations
- 3** Balancing personalization with customer comfort levels



- Technology
- Account-based marketing
- People
- Advertising
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness **AND** Marketing leads (*tie*)

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Resolve customer identity
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Personalize individual channel experiences



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** New regulations
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

United Kingdom (300 marketing professionals)

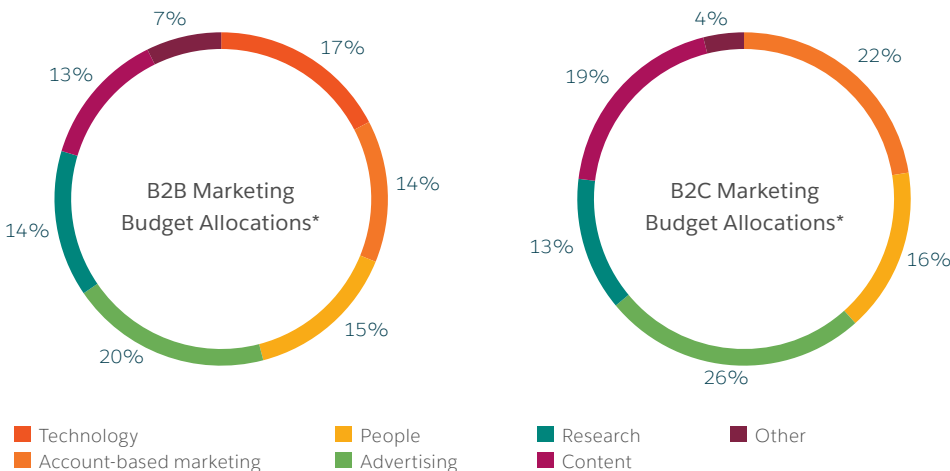
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Complying with privacy regulations
- 2** Innovating
- 3** Engaging customers in real time

Marketers' Top Challenges

- 1** Unifying customer data sources
- 2** Creating cohesive customer journeys across channels and devices
- 3** Engaging customers in real time



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize individual channel experiences
- 2** Improve customer segmentation/lookalike audience modeling
- 3** Automate customer interactions over social channels or messaging apps AND Personalize the overall customer journey (tie)



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Web/mobile analytics
- 3** Sales effectiveness

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Country Profile

United States (700 marketing professionals)

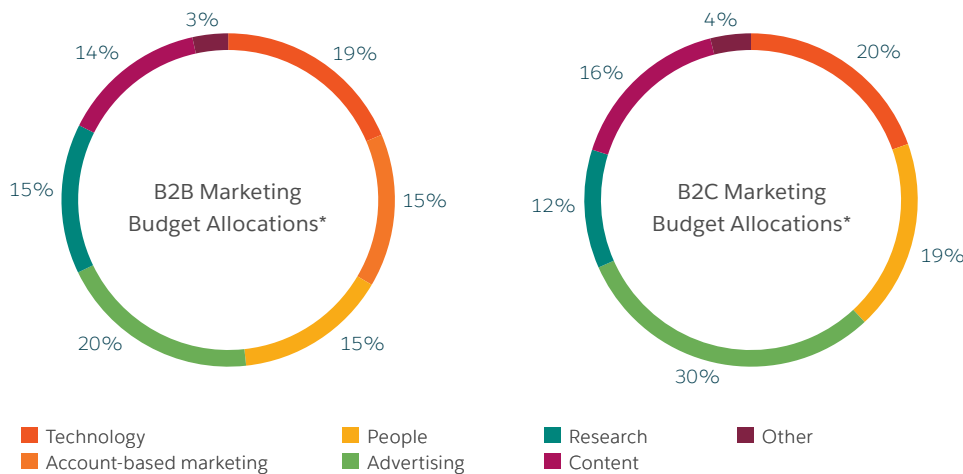
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Complying with privacy regulations
- 3** Engaging with customers in real time

Marketers' Top Challenges

- 1** Budgetary constraints
- 2** Innovating
- 3** Measuring marketing ROI/attribution AND Engaging customers in real time (*tie*)



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers' Top AI Use Cases

- 1** Personalize individual channel experiences
- 2** Personalize the overall customer journey
- 3** Programmatic advertising and media buying



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Web/mobile analytics
- 3** Digital engagement rates

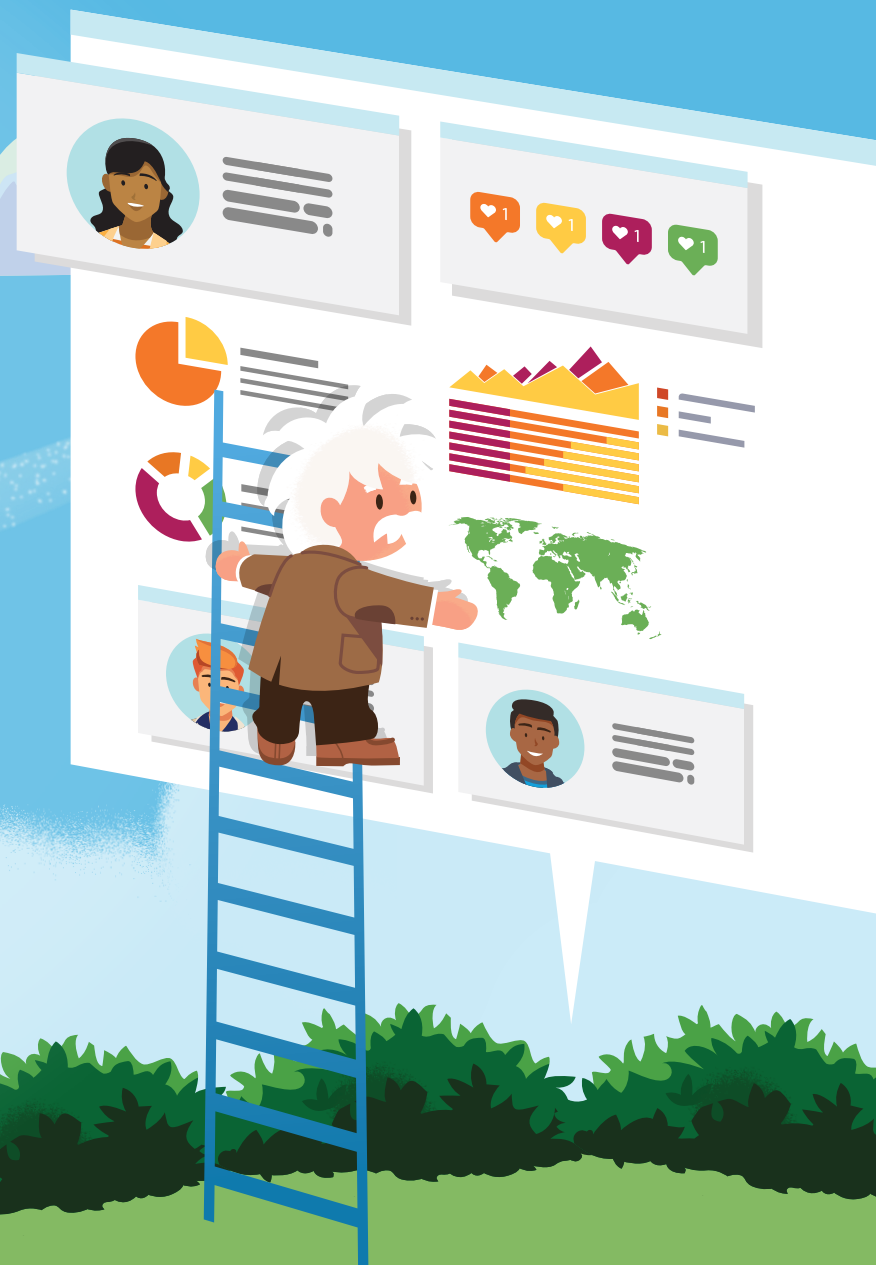
The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** 5G
- 3** New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

INDUSTRY PROFILES



Industry Profile

Automotive (464 marketing professionals)

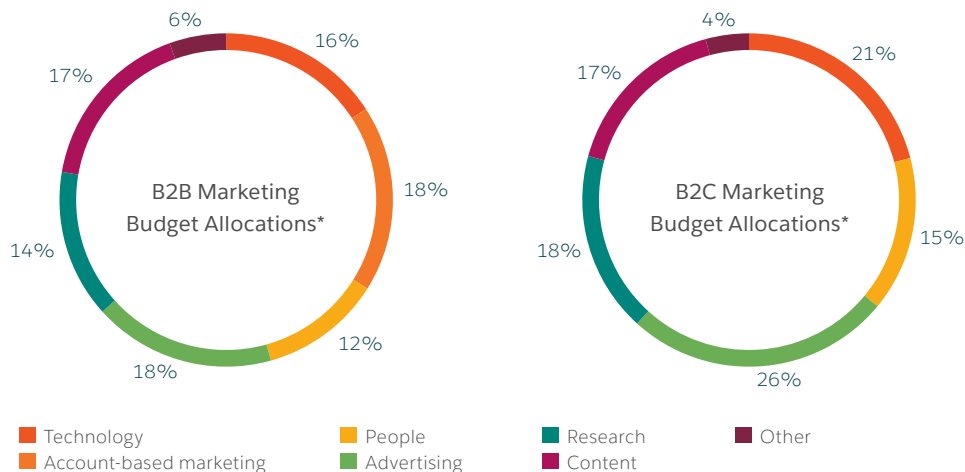
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Modernizing tools and technologies
- 3** Unifying customer data sources

Marketers' Top Challenges

- 1** Creating cohesive customer journeys across channels and devices
- 2** Engaging customers in real time
- 3** Insufficient organizational structure and processes



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Customer satisfaction

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Expanded online population
- 3** Virtual reality AND Smart homes (tie)

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Communications (329 marketing professionals)

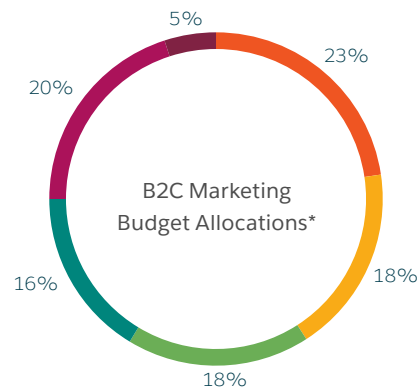
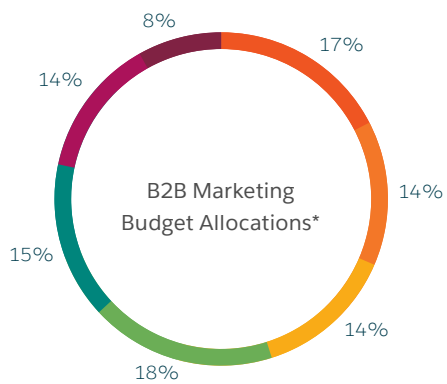
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations

Marketers' Top Challenges

- 1 Innovating AND Engaging customers in real time (*tie*)
- 3 Creating customer journeys across channels and devices



- Technology
- Account-based marketing
- People
- Advertising
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Customer satisfaction
- 2 Sales effectiveness
- 3 Revenue AND Web/mobile analytics (*tie*)

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 Smart homes

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Consumer Goods (882 marketing professionals)

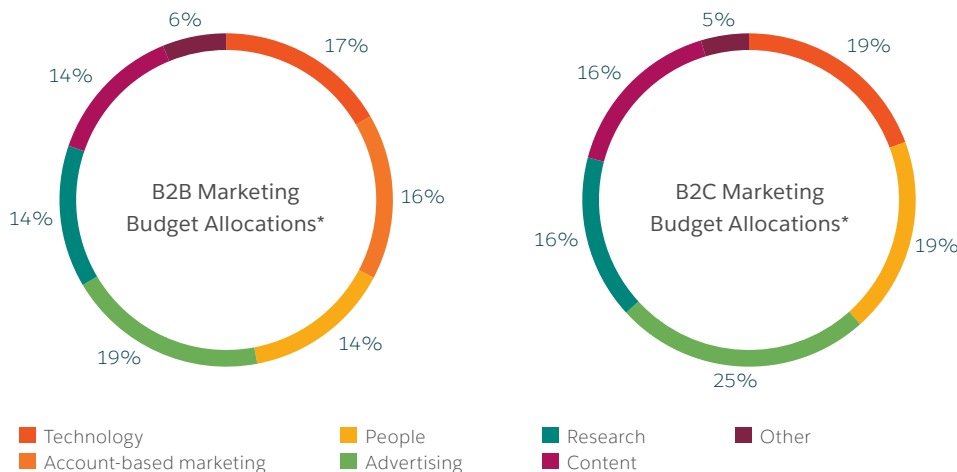
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Engaging customers in real time
- 3 Improving our use of tools and technologies

Marketers' Top Challenges

- 1 Innovating
- 2 Engaging customers in real time
- 3 Unifying customer data sources

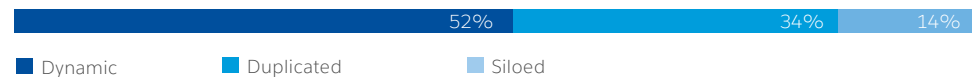


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Sales effectiveness
- 3 Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Energy and Utilities (395 marketing professionals)

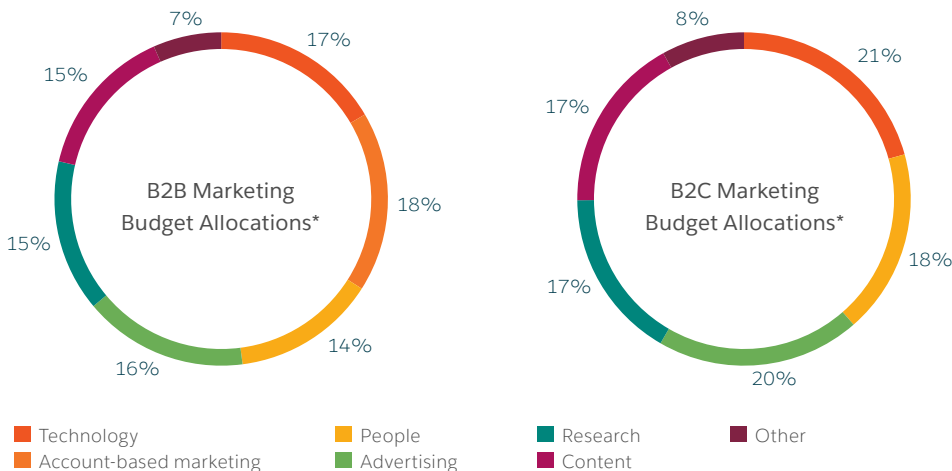
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Modernizing tools and technologies
- 2 Innovating
- 3 Improving our use of tools and technologies

Marketers' Top Challenges

- 1 Ineffective use of tools and technologies
- 2 Balancing personalization with customer comfort levels
- 3 Innovating

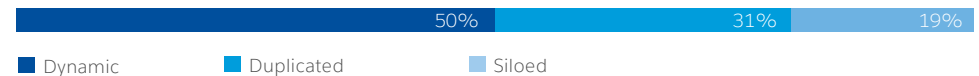


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Customer retention rates
- 3 Customer satisfaction

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G AND Virtual reality (tie)
- 2 Artificial intelligence
- 3 Augmented reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Financial Services (764 marketing professionals)

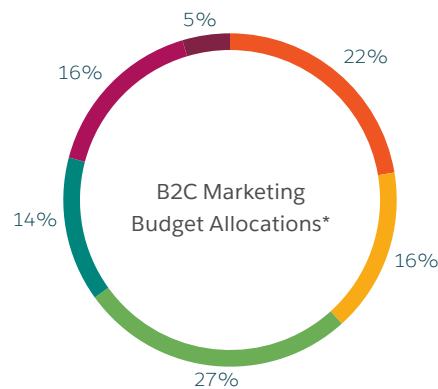
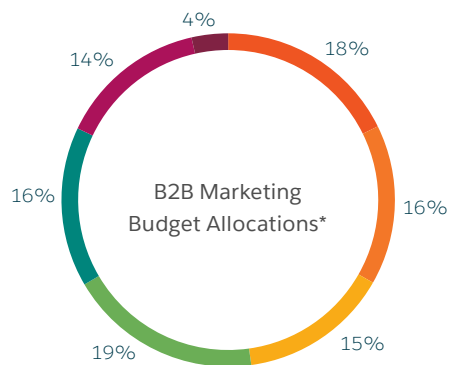
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Complying with privacy regulations
- 3 Engaging customers in real time

Marketers' Top Challenges

- 1 Engaging customers in real time
- 2 Innovating
- 3 Creating cohesive customer journeys across channels and devices



- Technology
- Account-based marketing
- Advertising
- People
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

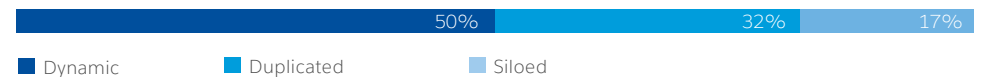
- 1 Revenue
- 2 Web/mobile analytics
- 3 Sales effectiveness

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Expanded online population
- 3 New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Government (93 marketing professionals)

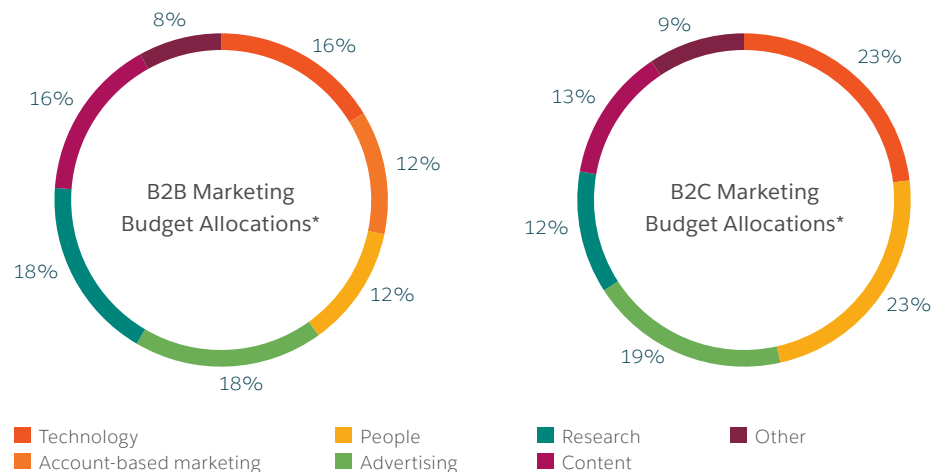
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Complying with privacy regulations
- 2 Hiring or developing talent
- 3 Innovating AND Engaging customers in real time (*tie*)

Marketers' Top Challenges

- 1 Engaging customers in real time
- 2 Sharing a unified view of customer data across business units AND Complying with privacy regulations (*tie*)

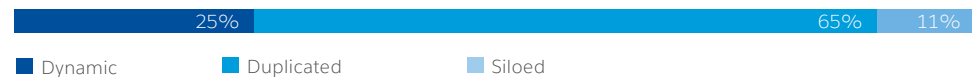


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Customer satisfaction
- 2 Social analytics
- 3 Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 New regulations
- 3 Expanded online population

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Healthcare (469 marketing professionals)

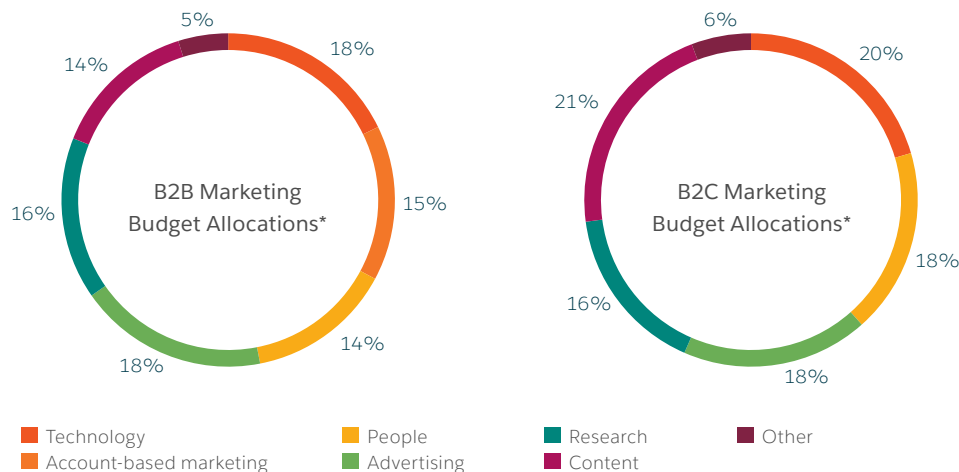
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Improving our use of tools and technologies
- 3** Improving marketing ROI/attribution

Marketers' Top Challenges

- 1** Engaging with customers in real time
- 2** Sharing a unified view of customer data across business units
- 3** Balancing personalization with customer comfort levels **AND** Creating cohesive customer journeys across channels and devices (*tie*)



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Customer satisfaction

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** Expanded online population
- 2** New regulations
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Life Sciences or Biotechnology (231 marketing professionals)

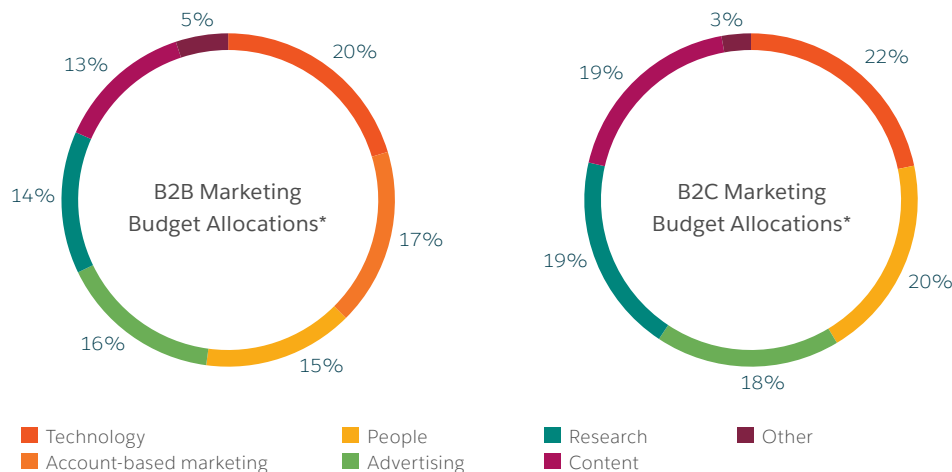
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Complying with privacy regulations
- 3** Unifying customer data sources

Marketers' Top Challenges

- 1** Sharing a unified view of customer data across business units AND Engaging customers in real time (*tie*)
- 3** Creating cohesive customer journeys across channels and devices

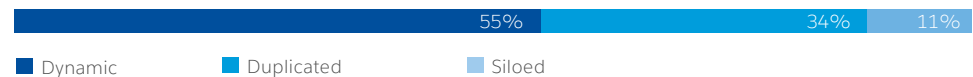


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Customer retention rates
- 2** Revenue
- 3** Sales effectiveness AND Customer satisfaction AND Channel ROI (*tie*)

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G
- 2** Virtual reality
- 3** Augmented reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Manufacturing (1,010 marketing professionals)

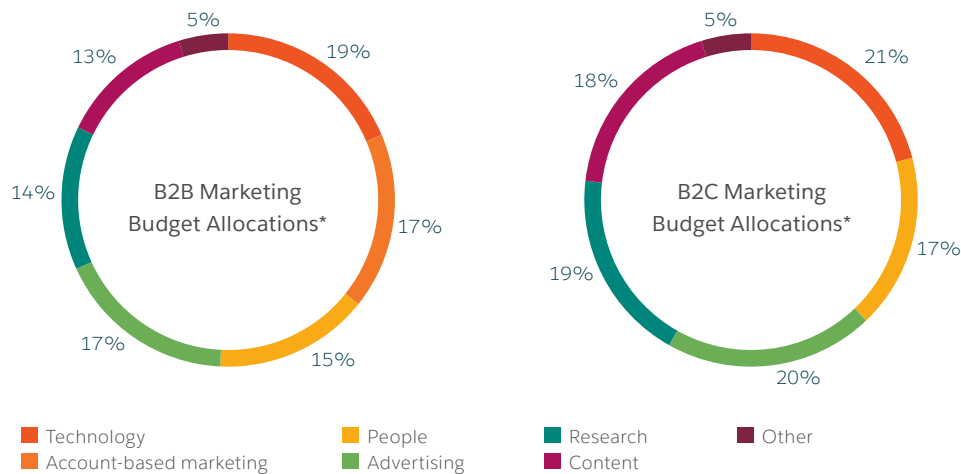
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1** Innovating
- 2** Engaging customers in real time
- 3** Modernizing tools and technologies

Marketers' Top Challenges

- 1** Engaging customers in real time
- 2** Innovating
- 3** Complying with privacy regulations

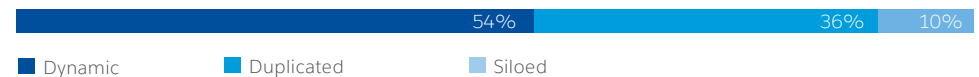


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1** Revenue
- 2** Sales effectiveness
- 3** Customer retention rates

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1** 5G AND Expanded online population (tie)
- 2** Artificial intelligence
- 3** Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Media and Entertainment (337 marketing professionals)

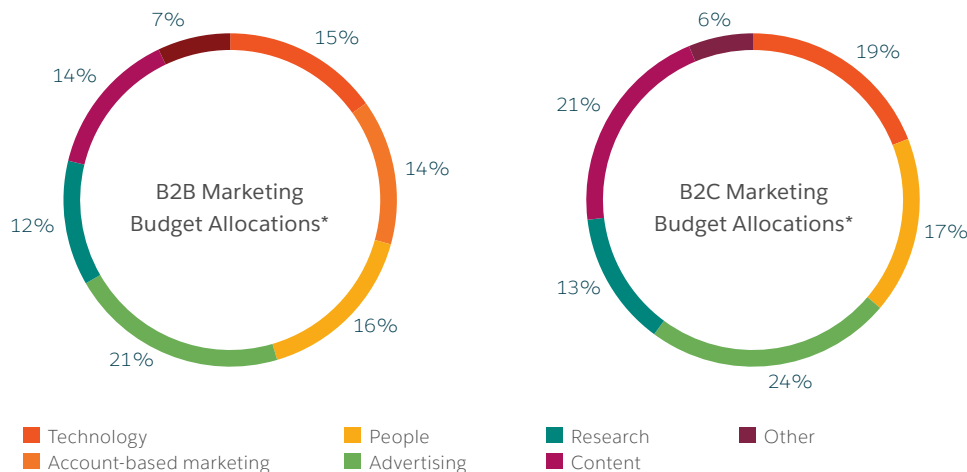
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations

Marketers' Top Challenges

- 1 Budgetary constraints
- 2 Engaging customers in real time
- 3 Innovating

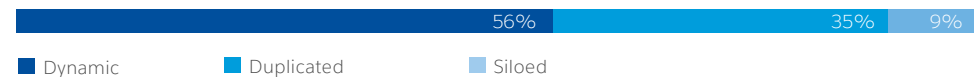


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Sales effectiveness
- 3 Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Expanded online population
- 3 Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Nonprofit (52 marketing professionals)

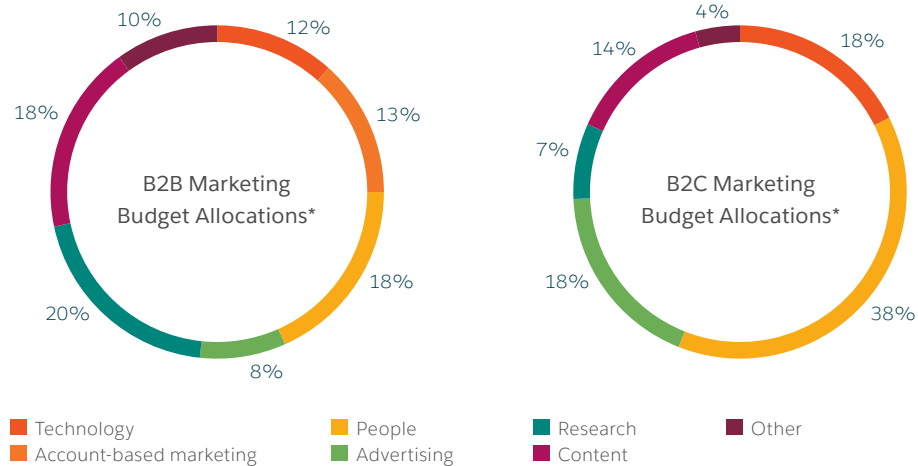
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Engaging customers in real time
- 2 Innovating AND Complying with privacy regulations (tie)

Marketers' Top Challenges

- 1 Budgetary constraints
- 2 Innovating
- 3 Outdated tools and technologies



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Web/mobile analytics
- 3 Social analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 New regulations
- 3 Voice technology

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Retail (926 marketing professionals)

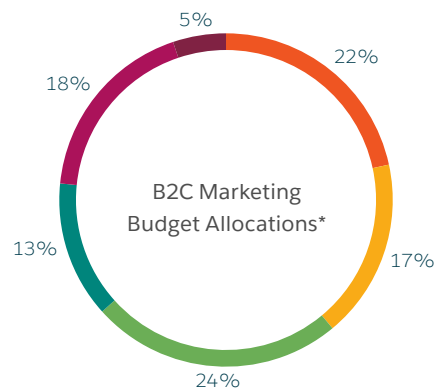
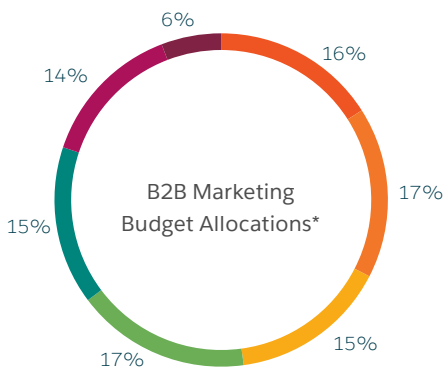
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations

Marketers' Top Challenges

- 1 Innovating
- 2 Engaging customers in real time
- 3 Measuring marketing ROI/attribution



- Technology
- Account-based marketing
- People
- Advertising
- Research
- Content
- Other

Marketers Double Down on Business Value

Marketers' Top Success Metrics

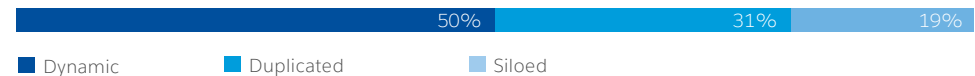
- 1 Revenue
- 2 Customer satisfaction
- 3 Web/mobile analytics

Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 Augmented reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Technology (687 marketing professionals)

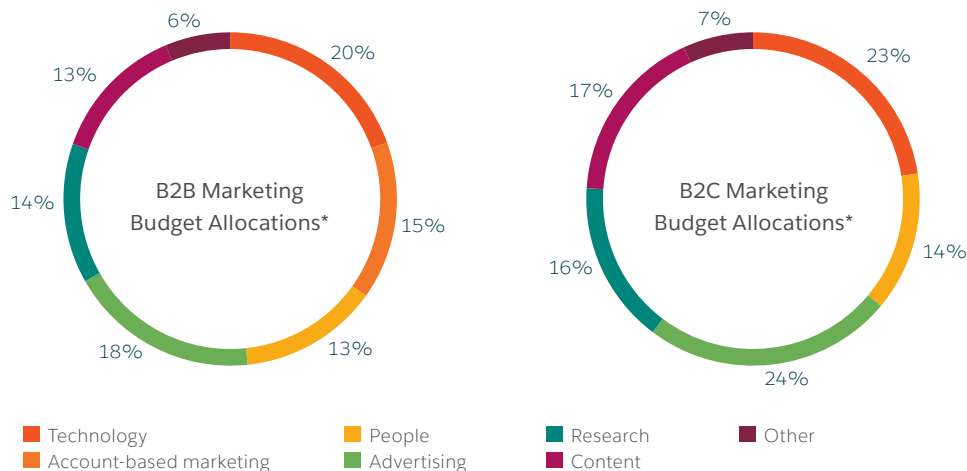
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Innovating
- 2 Complying with privacy regulations
- 3 Improving our use of tools and technologies

Marketers' Top Challenges

- 1 Innovating
- 2 Engaging customers in real time
- 3 Creating cohesive customer journeys across channels and devices



Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Sales effectiveness
- 3 Web/mobile analytics

The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 5G
- 2 Expanded online population
- 3 Virtual reality

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

Industry Profile

Transportation and Hospitality (202 marketing professionals)

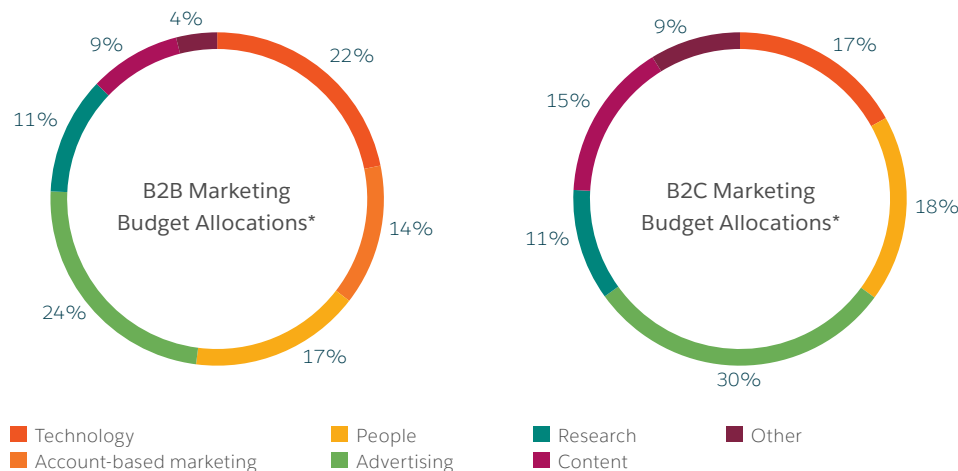
Marketing Transformation Takes On New Urgency

Marketers' Top Priorities

- 1 Engaging customers in real time
- 2 Innovating
- 3 Improving our use of tools and technologies

Marketers' Top Challenges

- 1 Engaging customers in real time
- 2 Budgetary constraints
- 3 Innovating

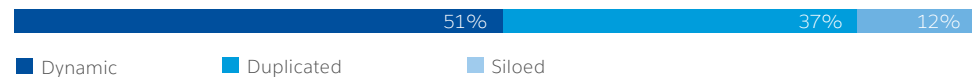


Customer Data Sets the Stage for Empathetic Marketing

Median Number of Customer Data Sources Used by Marketers



Marketers Who Describe Their Cross-Channel Coordination as Follows



Marketers Double Down on Business Value

Marketers' Top Success Metrics

- 1 Revenue
- 2 Web/mobile analytics
- 3 Customer satisfaction

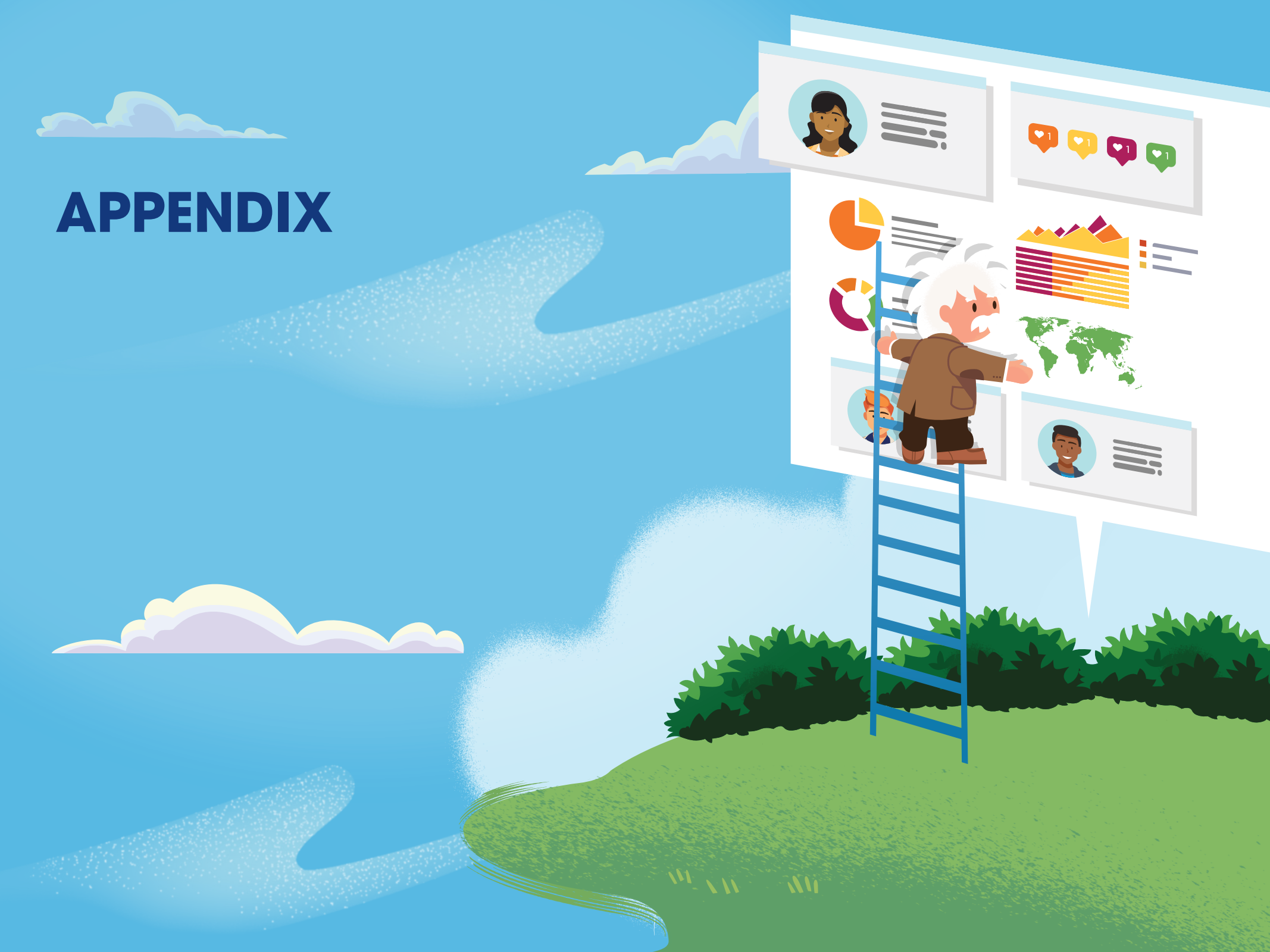
The Next Decade of Marketing Innovation

Technologies/Developments Expected to Have the Greatest Impact on Marketing by 2030

- 1 Expanded online population
- 2 5G
- 3 New regulations

* Data was collected prior to the COVID-19 pandemic and does not represent any changes in budget allocations that may result. B2B budget data includes B2B2C respondents.

APPENDIX



Marketers' Top Priorities

High Performers

- 1 Innovating
- 2 Improving our use of tools and technologies
- 3 Complying with privacy regulations
AND Engaging customers in real time *(tie)*
- 5 Improving marketing ROI/attribution

Moderate Performers

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations
- 4 Improving our use of tools and technologies
- 5 Modernizing tools and technologies

Underperformers

- 1 Complying with privacy regulations
- 2 Innovating
- 3 Modernizing tools and technologies
- 4 Improving our use of tools and technologies
- 5 Engaging customers in real time

B2B*

- 1 Innovating
- 2 Complying with privacy regulations
- 3 Engaging customers in real time
- 4 Improving our use of tools and technologies
- 5 Improving marketing ROI/attribution

B2C

- 1 Innovating
- 2 Engaging customers in real time
- 3 Complying with privacy regulations
- 4 Modernizing tools and technologies
- 5 Improving our use of tools and technologies

Marketers' Top Challenges

High Performers

- 1 Engaging customers in real time
- 2 Creating cohesive customer journeys across channels and devices
- 3 Innovating
- 4 Unifying customer data sources
- 5 Insufficient organizational structure and processes

Moderate Performers

- 1 Engaging customers in real time
- 2 Innovating
- 3 Creating cohesive customer journeys across channels and devices
- 4 Unifying customer data sources
- 5 Sharing a unified view of customer data across business units

Underperformers

- 1 Budgetary constraints
- 2 Innovating
- 3 Insufficient human resources
- 4 Creating cohesive customer journeys across channels and devices
- 5 Measuring marketing ROI/attribution

B2B*

- 1 Engaging customers in real time
- 2 Innovating
- 3 Creating cohesive customer journeys across channels and devices
- 4 Insufficient organizational structure and processes
- 5 Unifying customer data sources

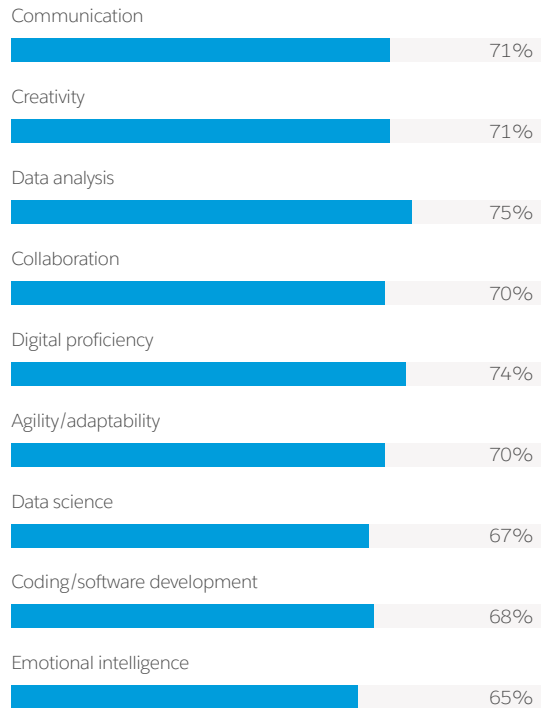
B2C

- 1 Innovating
- 2 Engaging customers in real time
- 3 Budgetary constraints
- 4 Creating cohesive customer journeys across channels and devices
- 5 Balancing personalization with customer comfort levels

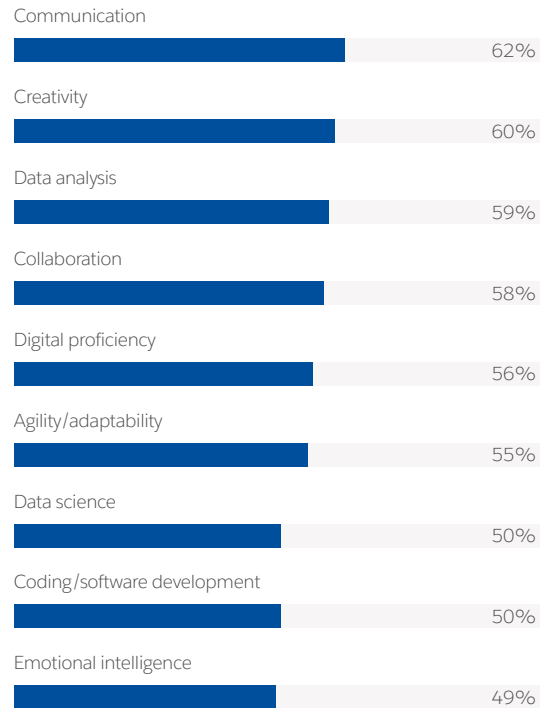
* Includes B2B2C marketers.

Marketers Who Rate Their Team's Skills as Advanced, by Company Performance

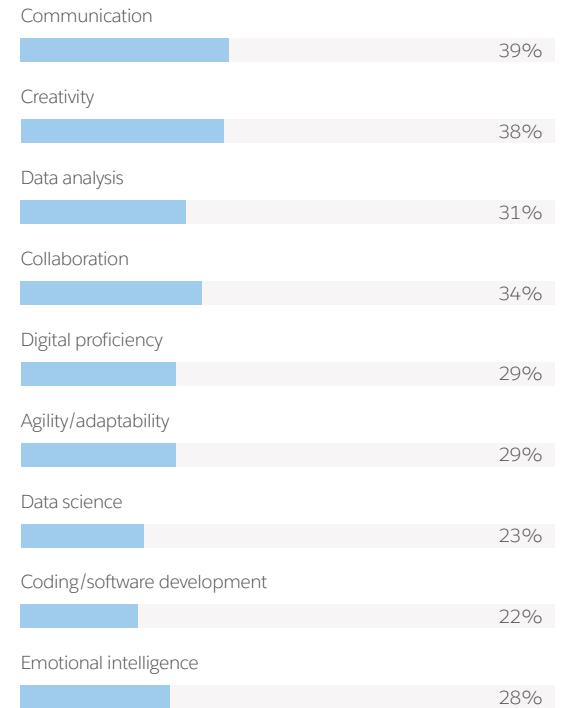
High Performers



Moderate Performers



Underperformers



High Performers



Moderate Performers

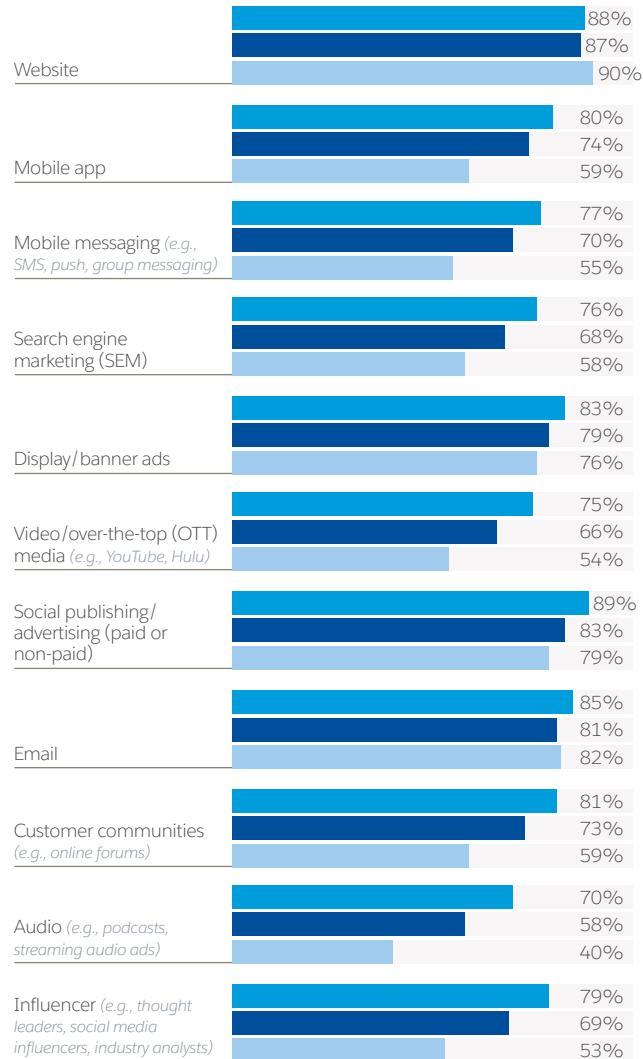


Underperformers



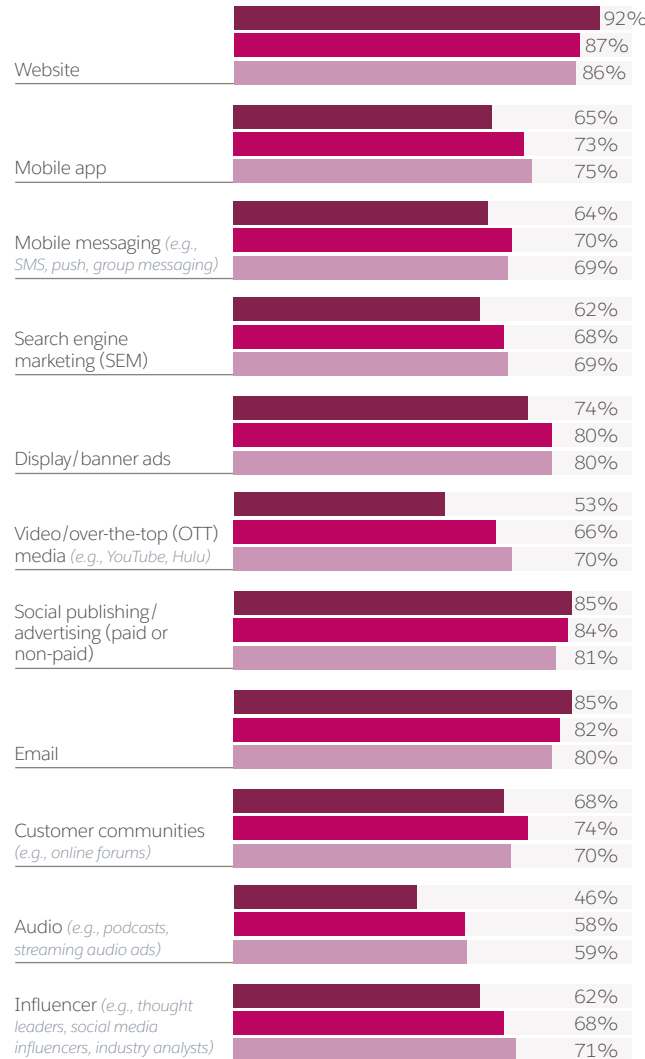
Marketers Using the Following Customer/Prospect Communication Channels

Company Performance



High performers Moderate performers Underperformers

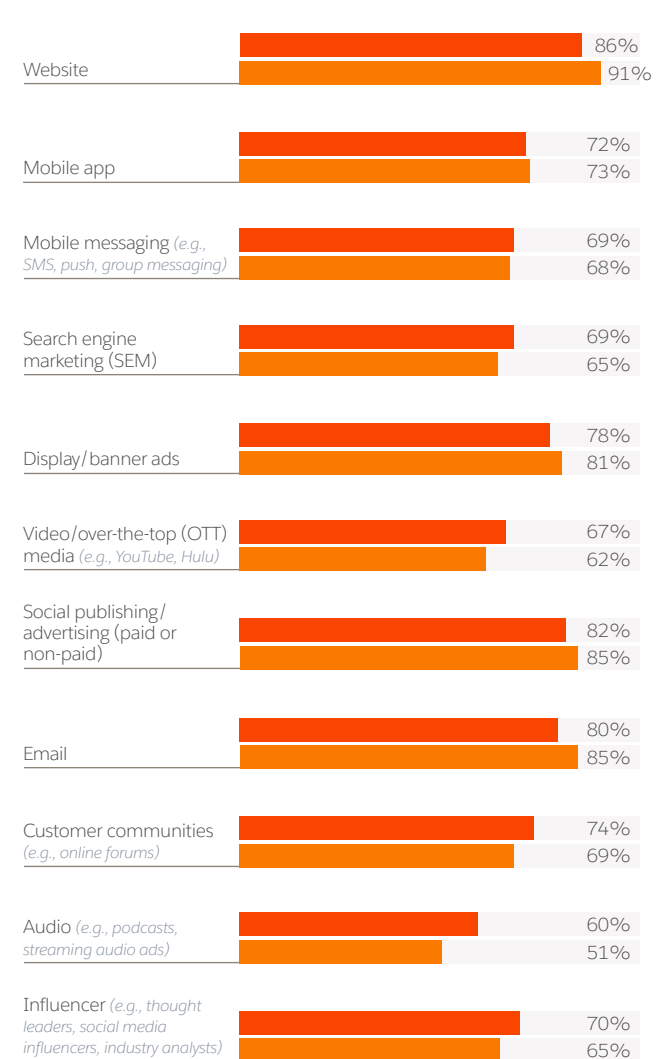
Company Size



SMB Midmarket Enterprise

Company size: SMB (21-100 employees), Midmarket (101-3,500 employees), Enterprise (more than 3,500 employees)

Business Type



B2B* B2C

* Includes B2B2C marketers.

Salesforce Research

Appendix

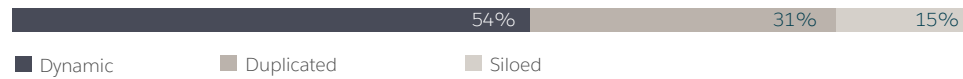
Channel Coordination

Marketers Who Describe Their Cross-Channel Coordination as Follows, by Company Performance and Business Type

High Performers



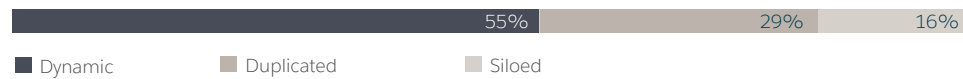
Moderate Performers



Underperformers

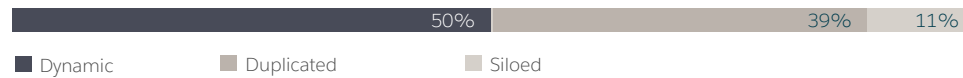


B2B*



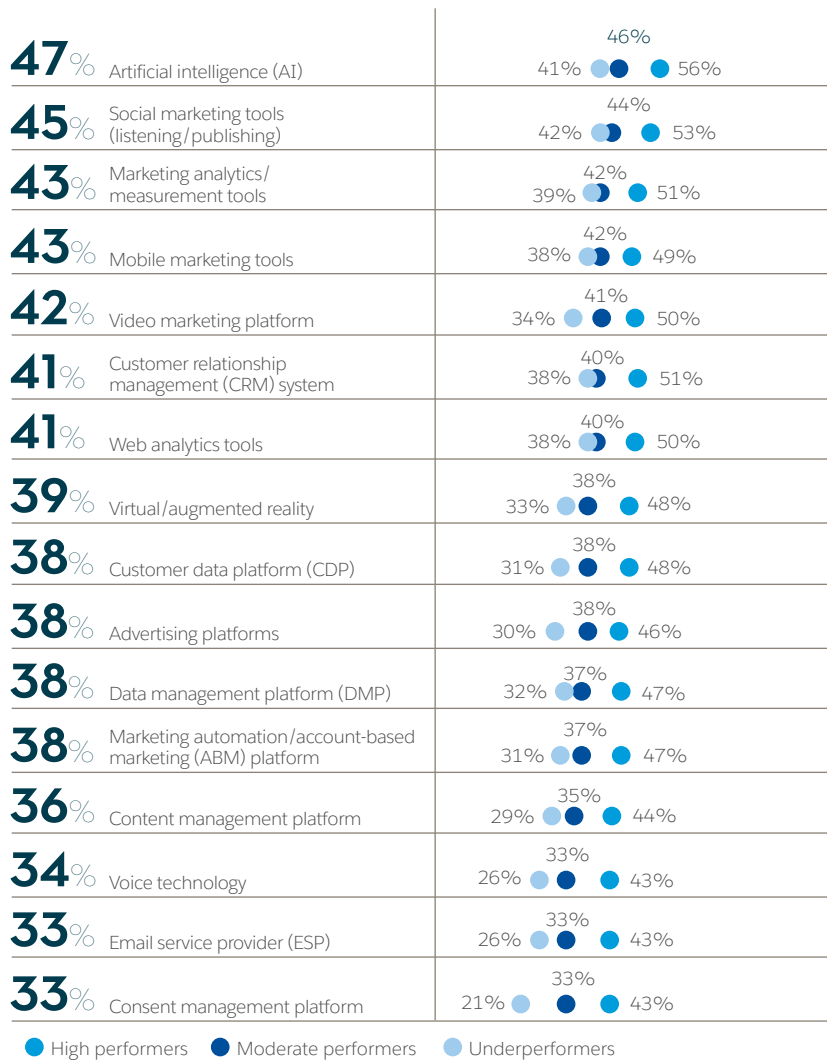
* Includes B2B2C marketers.

B2C



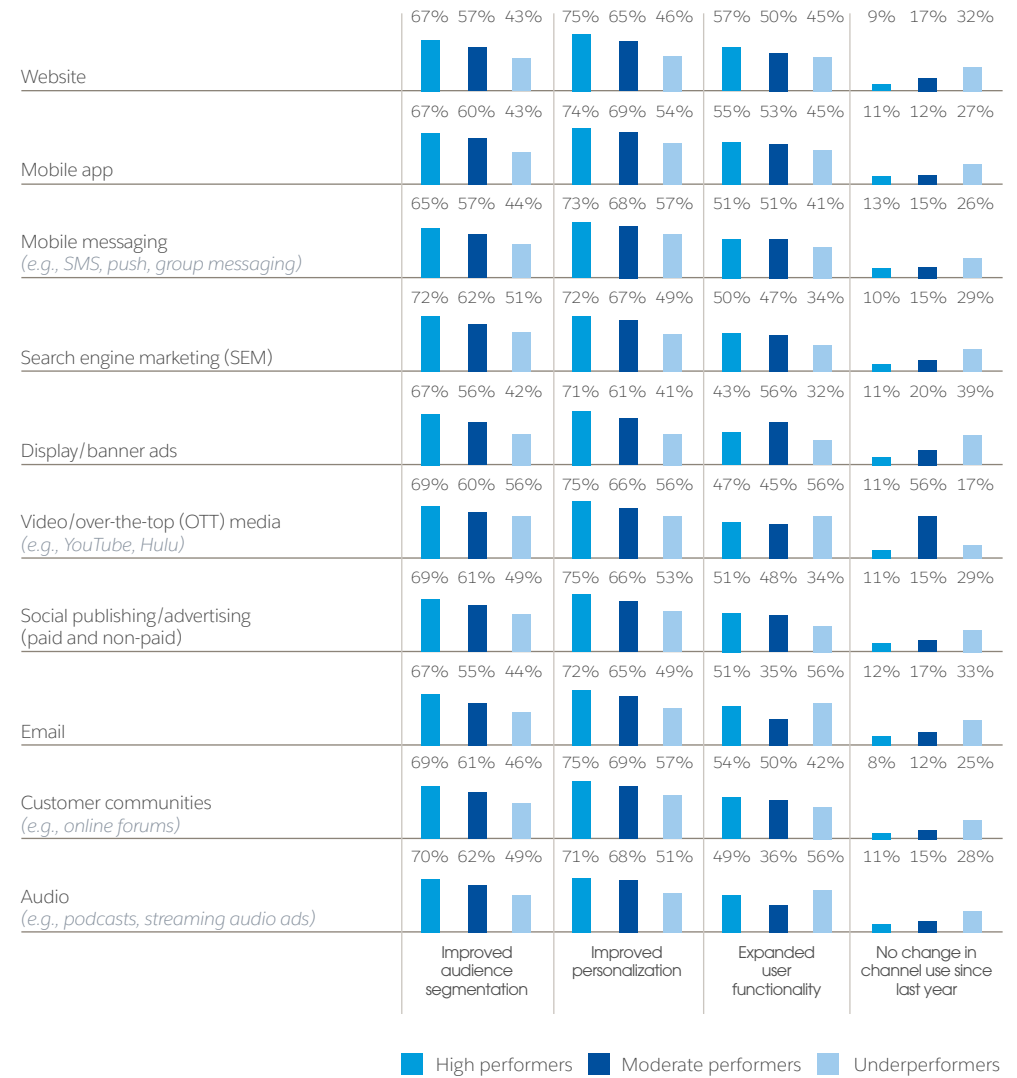
Changes in Technology and Channel Use

Marketers Planning to Increase Use of the Following Technologies over the Next Year, by Company Performance



Base: Marketers using the indicated channel.

How Marketers Have Changed Their Use of Channels over the Past Year, by Company Performance



Appendix

Data Sources

Median Number of Data Sources Used by Marketers



Company size: SMB (21-100 employees),
Midmarket (101-3,500 employees),
Enterprise (more than 3,500 employees)

* Includes B2B2C marketers.

Ranking of Most Common Technologies for Marketing Data Management, by Company Performance

High Performers

- 1 Customer relationship management (CRM) system
- 2 Customer data platform (CDP)
- 3 Advertising platforms **AND** Data management platform (DMP) (*tie*)
- 5 Marketing automation/ account-based marketing (ABM) platform
- 6 Email service provider (ESP)
- 7 Consent management platform
- 8 Homegrown solution

Moderate Performers

- 1 Customer relationship management (CRM) system
- 2 Email service provider (ESP)
- 3 Advertising platforms
- 4 Data management platform (DMP)
- 5 Customer data platform (CDP)
- 6 Marketing automation/ account-based marketing (ABM) platform
- 7 Consent management platform
- 8 Homegrown solution

Underperformers

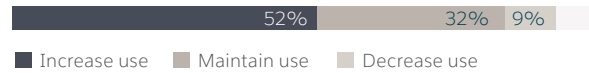
- 1 Customer relationship management (CRM) system
- 2 Email service provider (ESP)
- 3 Advertising platforms
- 4 Data management platform (DMP)
- 5 Homegrown solution
- 6 Customer data platform (CDP)
- 7 Marketing automation/ account-based marketing (ABM) platform
- 8 Consent management platform

Appendix

Artificial Intelligence (AI) Adoption and Use Cases

Marketers Reporting AI Use This Year, by Company Performance

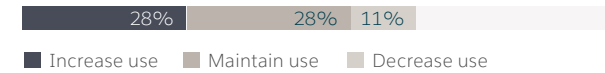
High Performers



Moderate Performers



Underperformers



High Performers

Average number of ways a high-performing company uses AI

7

Moderate Performers

Average number of ways a moderate-performing company uses AI

7

Underperformers

Average number of ways an underperforming company uses AI

6

Marketers' Top AI Use Cases, by Company Performance

High Performers

- 1 Improve customer segmentation/lookalike audience modeling
- 2 Personalize individual channel experiences
- 3 Automate customer interactions over social channels or messaging apps
- 4 Bridge online and offline experiences
- 5 Drive next best actions in real time

Moderate Performers

- 1 Personalize individual channel experiences
- 2 Surface data insights
- 3 Drive next best actions in real time
- 4 Improve customer segmentation/lookalike audience modeling
- 5 Automate customer interactions over social channels or messaging apps

Underperformers

- 1 Personalize individual channel experiences
- 2 Surface data insights
- 3 Improve customer segmentation/lookalike audience modeling
- 4 Personalize the overall customer journey
- 5 Drive next best actions in real time

Artificial Intelligence (AI) Adoption and Use Cases

Marketers Reporting AI Use This Year, by Business Type

B2B*



B2C



B2B*

Average number of ways a B2B company uses AI

7

B2C

Average number of ways a B2C company uses AI

7

Marketers' Top AI Use Cases, by Business Type

B2B*

- 1 Improve customer segmentation/lookalike audience modeling
- 2 Personalize individual channel experiences
- 3 Surface data insights
- 4 Drive next best actions in real time
- 5 Personalize the overall customer journey

B2C

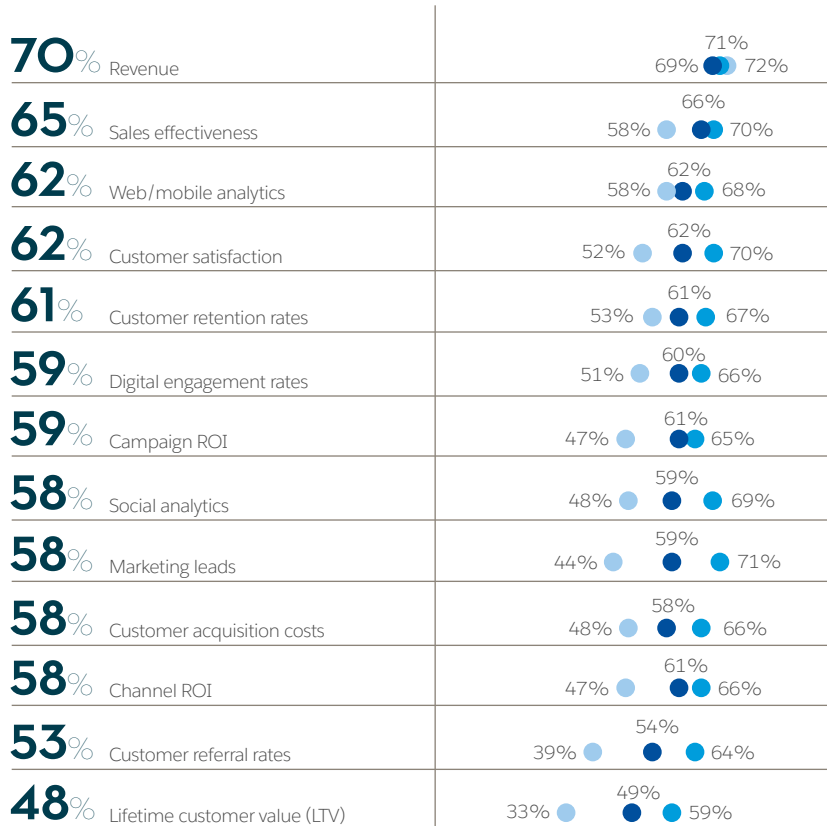
- 1 Personalize individual channel experiences
- 2 Surface data insights
- 3 Drive next best actions in real time
- 4 Automate customer interactions over social channels or messaging apps
AND
Improve customer segmentation/lookalike audience modeling (tie)

* Includes B2B2C marketers.
Base: Marketers who use artificial intelligence (AI).

Appendix

Metrics Across the Journey

Metrics Currently Tracked, by Company Performance



- High performers
- Moderate performers
- Underperformers

Top-Ranked Overall Marketing Program Success Metrics, by Company Performance



Appendix

Metrics Across the Journey

Metrics Currently Tracked, by Business Type

70% Revenue	73% ●● 77%
65% Sales effectiveness	65% ● 66%
62% Web/mobile analytics	61% ●● 64%
62% Customer satisfaction	61% ● 62%
61% Customer retention rates	60% ● 62%
59% Digital engagement rates	58% ●● 61%
59% Campaign ROI	60% ● 59%
58% Social analytics	58% ● 59%
58% Marketing leads	57% ●● 59%
58% Customer acquisition costs	57% ● 58%
58% Channel ROI	57% ● 58%
53% Customer referral rates	52% ●● 54%
48% Lifetime customer value (LTV)	45% ●● 50%

● B2B* ● B2C

* Includes B2B2C marketers.

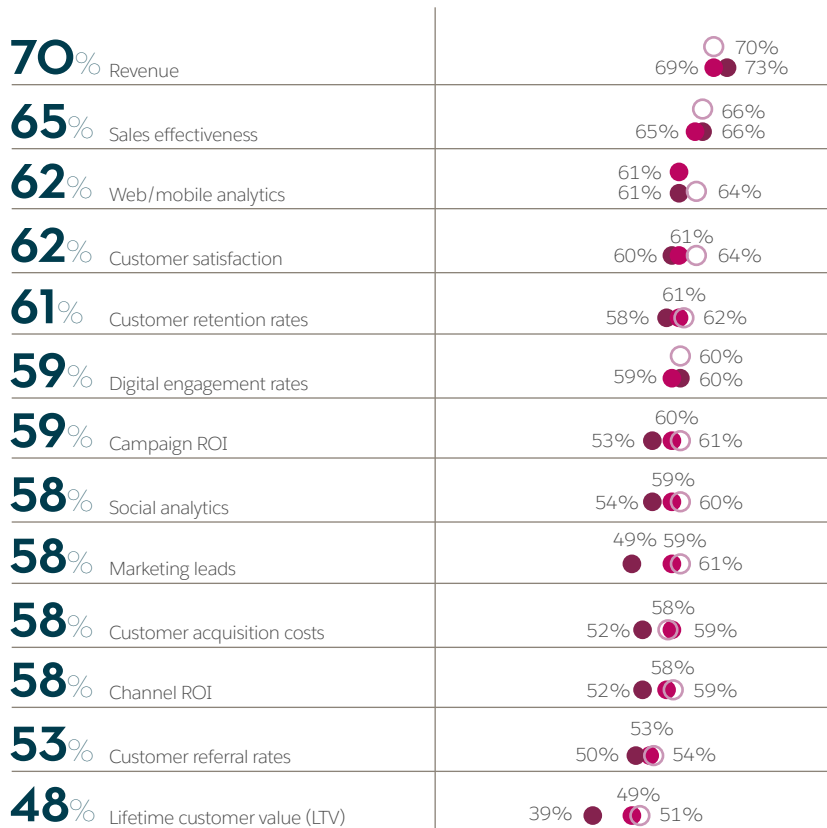
Top-Ranked Overall Marketing Program Success Metrics, by Business Type



Appendix

Metrics Across the Journey

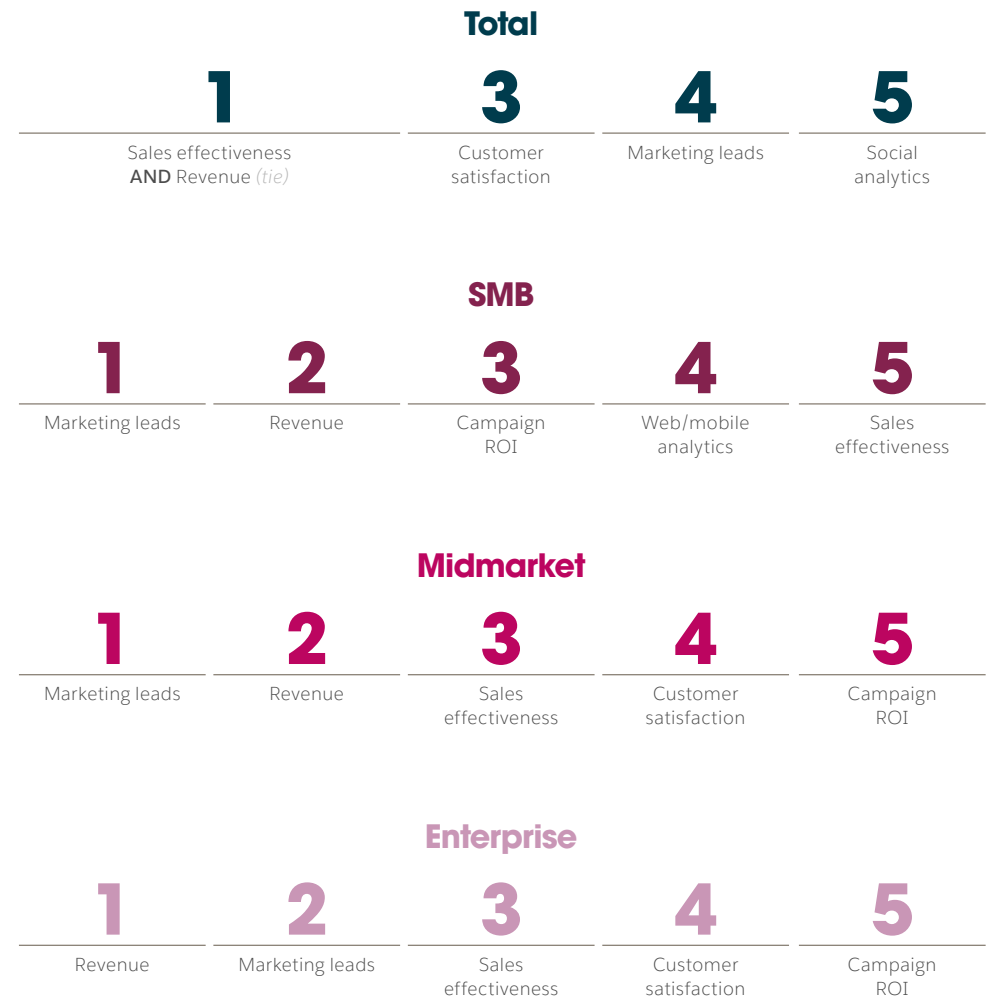
Metrics Currently Tracked, by Company Size



● SMB ● Midmarket ○ Enterprise

Company size: SMB (21–100 employees),
Midmarket (101–3,500 employees),
Enterprise (more than 3,500 employees)

Top-Ranked Overall Marketing Program Success Metrics, by Company Size

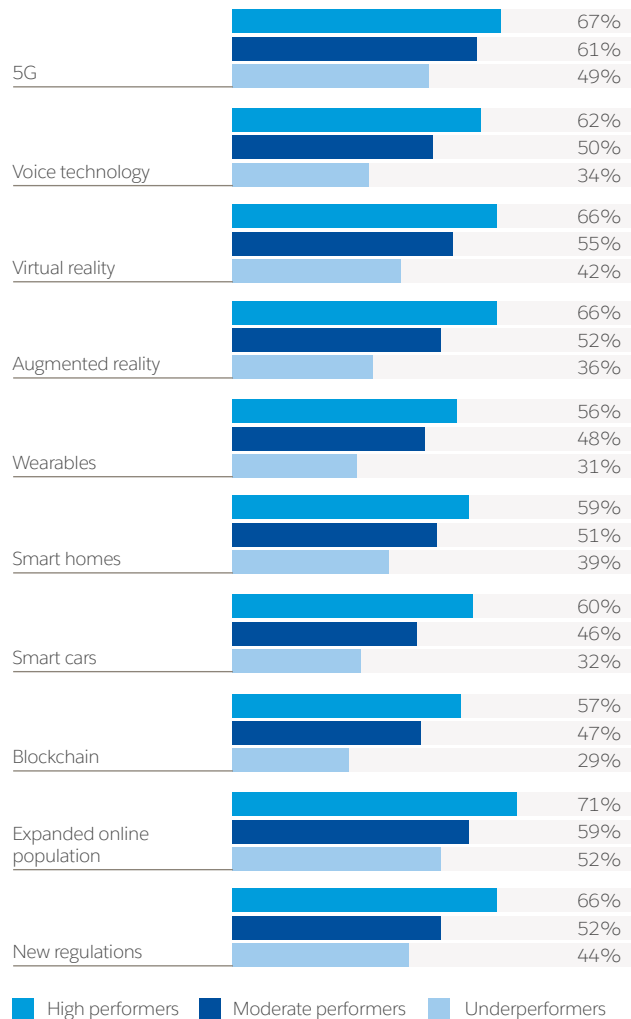


Appendix

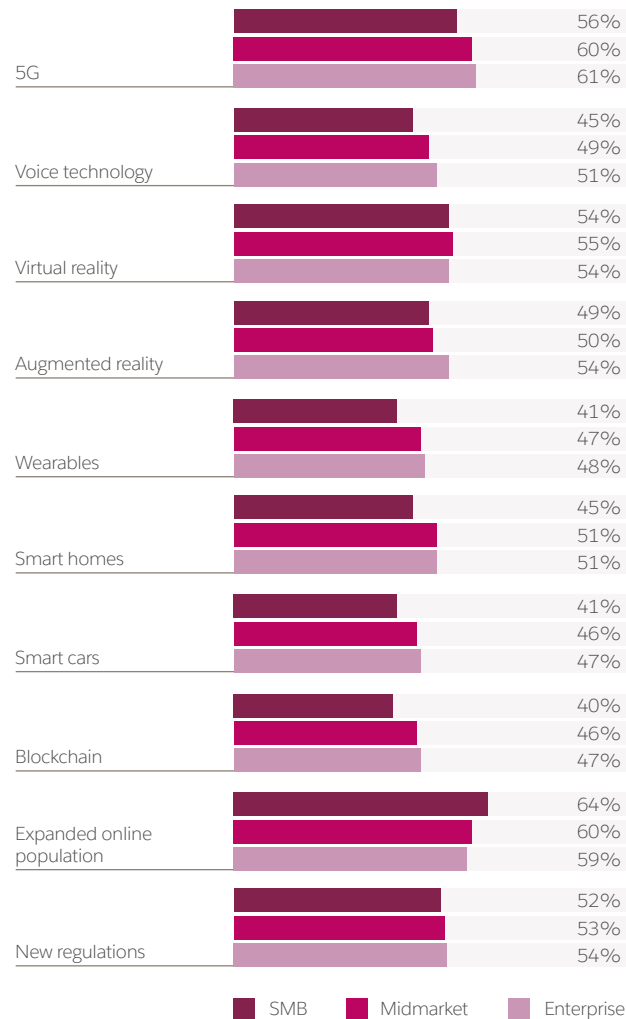
The Next Decade of Marketing

Technologies and More Anticipated to Have a Major Impact on Marketing over the Next Decade

Company Performance

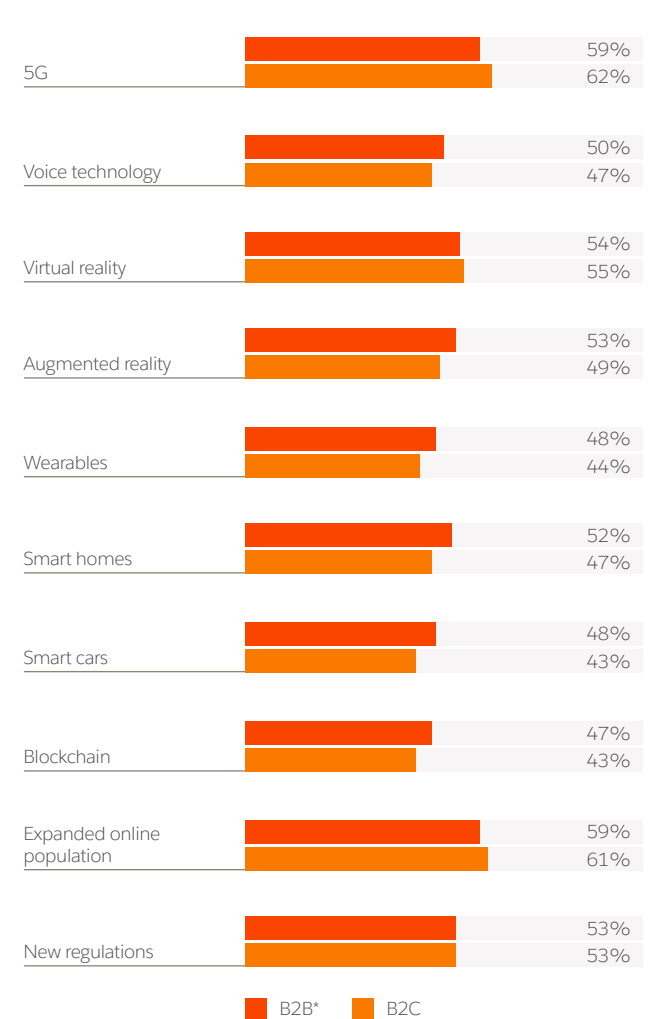


Company Size



Company size: SMB (21-100 employees), Midmarket (101-3,500 employees), Enterprise (more than 3,500 employees)

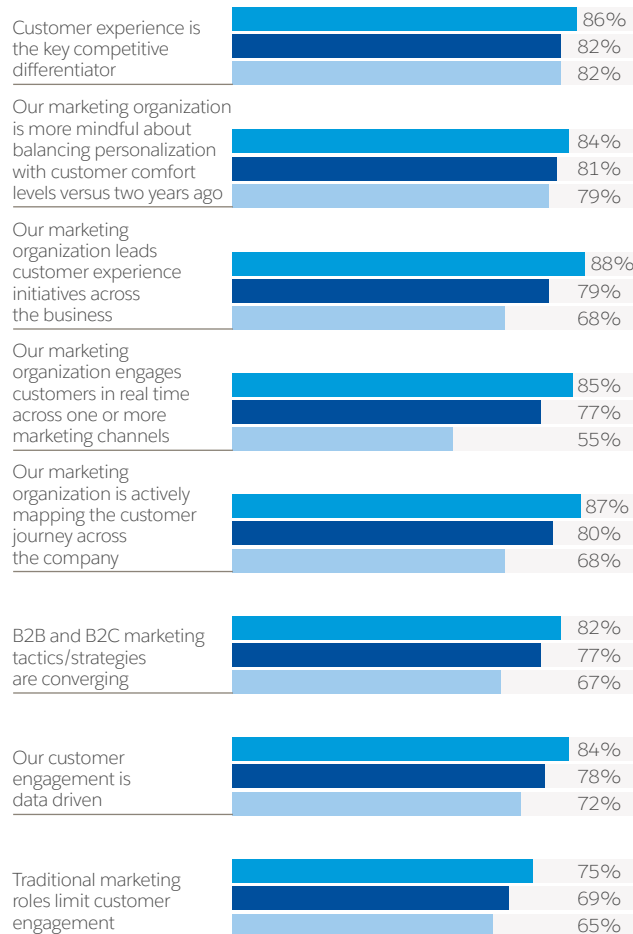
Business Type



* Includes B2B2C marketers.

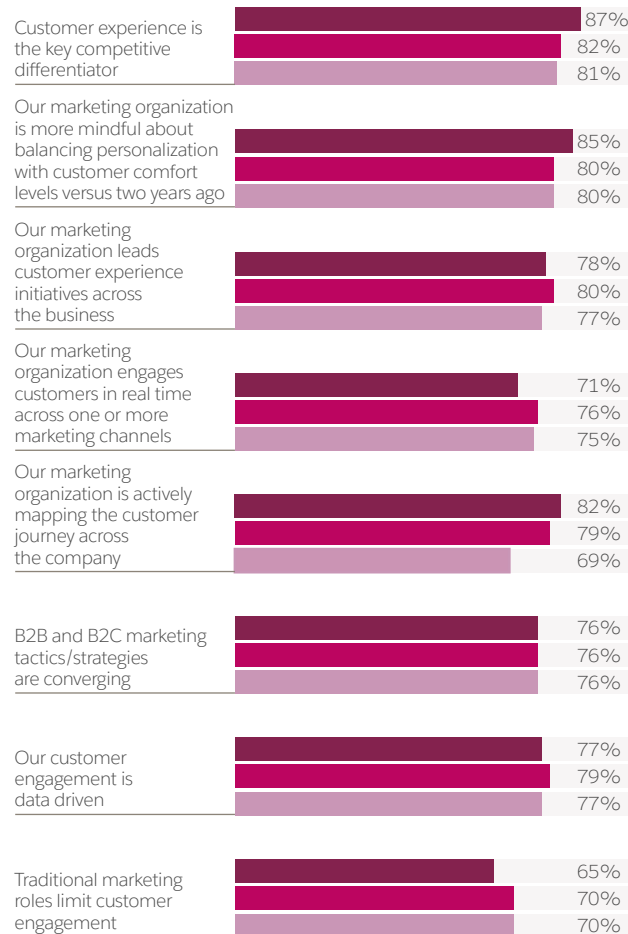
Marketers Who Agree with the Following Statements

Company Performance



High performers Moderate performers Underperformers

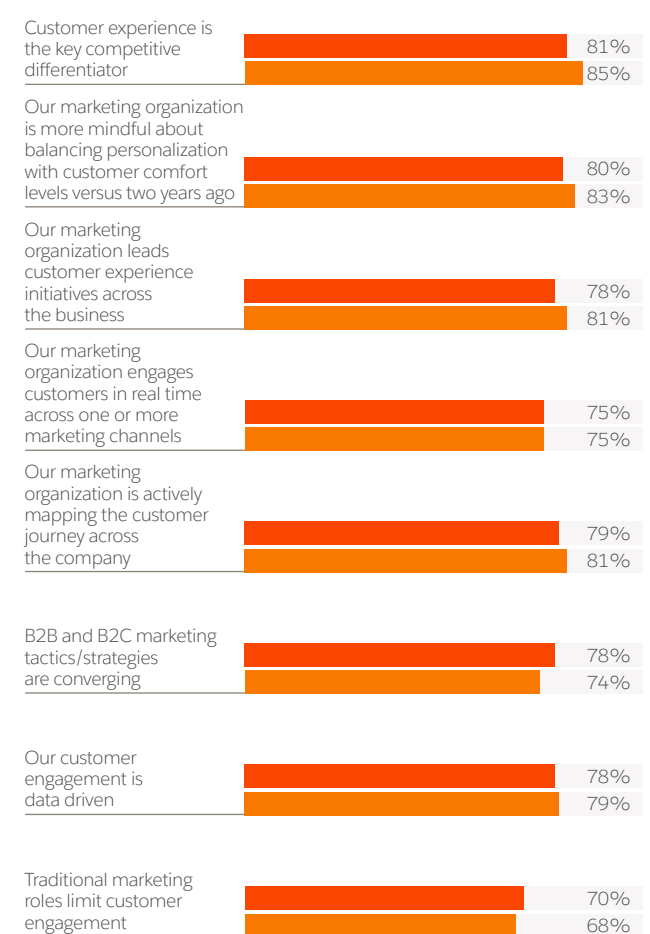
Company Size



SMB Midmarket Enterprise

Company size: SMB (21-100 employees), Midmarket (101-3,500 employees), Enterprise (more than 3,500 employees)

Business Type

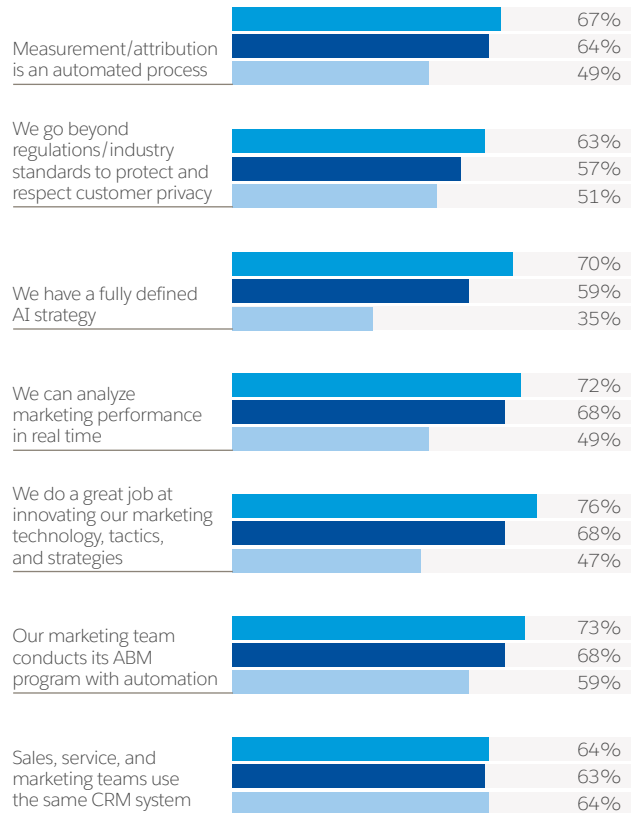


B2B* B2C

* Includes B2B2C marketers.

Marketers Who Agree with the Following Statements

Company Performance



High performers Moderate performers Underperformers

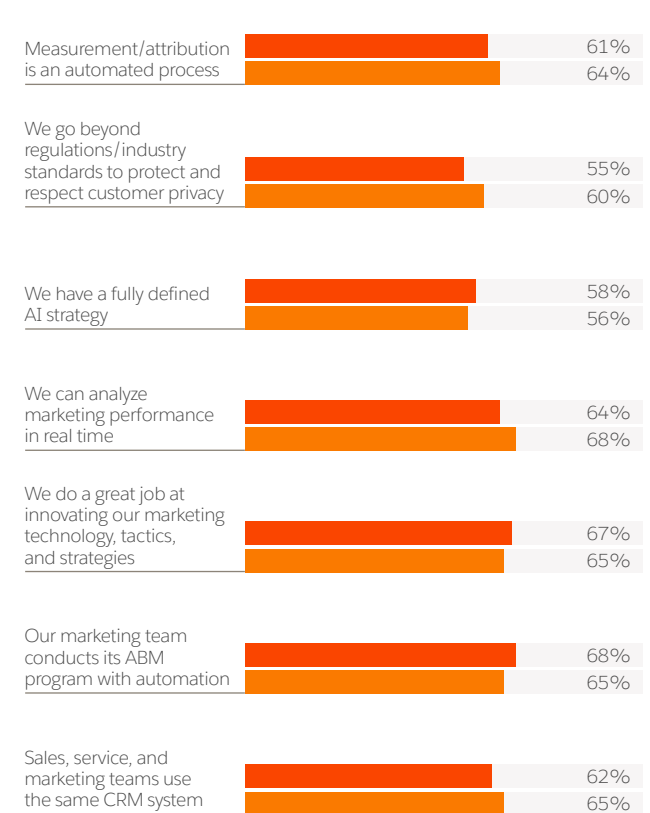
Company Size



SMB Midmarket Enterprise

Company size: SMB (21-100 employees), Midmarket (101-3,500 employees), Enterprise (more than 3,500 employees)

Business Type



B2B* B2C

* Includes B2B2C marketers.

SURVEY DEMOGRAPHICS



INDUSTRY

Automotive.....	7%
Communications.....	5%
Consumer goods.....	13%
Energy and utilities.....	6%
Financial services.....	11%
Government.....	1%
Healthcare.....	7%
Life sciences or biotechnology.....	3%
Manufacturing.....	15%
Media and entertainment.....	5%
Nonprofit.....	1%
Retail.....	13%
Technology.....	10%
Transportation and hospitality.....	3%
Other.....	2%

COMPANY TYPE

Business-to-business (B2B).....	25%
Business-to-consumer (B2C).....	35%
Business-to-business-to-consumer (B2B2C).....	40%

COMPANY SIZE

SMB (1-100 employees).....	11%
Midmarket (101-3,500 employees).....	63%
Enterprise (3,501+ employees).....	26%

GENERATION

Baby Boomers.....	4%
Gen Xers.....	44%
Millennials/Gen Zers.....	52%

ROLE WITHIN MARKETING

CMO.....	26%
Marketing VP.....	8%
Marketing director.....	34%
Marketing manager.....	31%

REGION

Europe, Middle East, and Africa.....	51%
Asia Pacific.....	27%
U.S. & Canada.....	14%
Latin America.....	7%

COUNTRY

Australia/New Zealand.....	4%
Belgium.....	3%
Brazil.....	4%
Canada.....	4%
France.....	4%
Germany.....	4%
Hong Kong.....	3%
India.....	4%
Ireland.....	3%
Israel.....	2%
Italy.....	4%
Japan.....	4%
Mexico.....	3%
Netherlands.....	4%
Nordics (Denmark, Finland, Norway, Sweden).....	4%
Philippines.....	3%
Poland.....	4%
Singapore.....	3%
South Africa.....	3%
South Korea.....	3%
Spain.....	4%
Switzerland.....	3%
Thailand.....	3%
United Arab Emirates.....	3%
United Kingdom.....	4%
United States.....	10%



Browse all reports at salesforce.com/research.