2016

# State of Marketing

Trends and insights from nearly 4,000 marketing leaders worldwide

# A Note from Scott McCorkle, Salesforce Marketing Cloud CEO

**I'm excited to present** the "2016 State of Marketing" report, the third annual installment of this in-depth industry research.

Marketing leaders often ask, "What does a customer expect when they interact with our brand?" Customers expect consistency. They expect interactions across any channel to be the same, where the organization demonstrates that they really know the customer. The always-connected customer wants that connected experience.

We, as marketers, can manage this now. If we truly put customers at the center of our thinking – considering how we can make any touchpoint delightful – it changes the way we approach applying all the tools available to us as marketers.

It's not only what we think of traditionally as marketing. It's also about considering customer support functions, selling functions, community building – every touchpoint. In short, it's the complete customer experience.

As this research shows, high-performing marketing teams have shifted their mindset and tactics from marketing at customers, to focusing on connecting every touchpoint into a cohesive customer journey.

In 2016, marketing is the focal point of managing customers in an entirely new way. It's a huge opportunity to lead your business forward, and I hope you'll use the findings in this report as a guide.

Best,

**Scott McCorkle**
*CEO, Salesforce Marketing Cloud*

# About This Report

For the third annual "State of Marketing" report, Salesforce Research surveyed nearly 4,000 marketing leaders worldwide to discover:
· Overall trends changing the role of marketing
· How high-performing marketing teams approach marketing intelligence and customer experience
· Key insights on primary digital marketing channels

Throughout this report, data is examined relative to business performance to identify patterns for overall success. High-performing marketing teams are those who are extremely satisfied with the current outcomes realized as a direct result of their company's marketing investment. See page 4 for a breakdown of high, moderate, and underperformers.

Salesforce Research took a modified approach to this 2016 report.[1] While we revisited many topics covered in our 2015 research to provide year-over-year analysis, this year's survey included only marketers holding leadership roles within their organization. This shift allowed deeper discovery around team performance – and a closer look at what separates the world's most successful marketers from the rest.

1,706

1,190

353

726

[1] Conducted in 2016, this survey generated responses from 3,975 full-time marketing leaders (not limited to Salesforce customers) in the U.S., Canada, Brazil, U.K., France, Germany, Netherlands, the Nordics, Japan, and Australia. Respondents included third-party panelists. Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers). This survey encompassed marketers in B2C (26%), B2B (29%), and B2B2C roles (45%).

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

## Breakdown of Marketing Performance Levels

*High-performing marketing teams represent 18% of the overall survey population. Marketers surveyed include B2C, B2B, and B2B2C teams.*

Moderate performers
are "very or moderately satisfied" with the current outcomes realized as a direct result of their company's marketing investment

68%

High performers
are "extremely satisfied" with the current outcomes realized as a direct result of their company's marketing investment

Underperformers
are "slightly or not at all satisfied" with the current outcomes realized as a direct result of their company's marketing investment

14%

18%

# Table of Contents

*Experience an interactive version of this report online at  interactive.salesforce.com/state-of-marketing.*

# Executive Summary
## Nine key takeaways

Digital is king, and the customer experience is the crown jewel. For marketing leaders in 2016, these two truths are shaping the path of the profession.

How are the world's top marketing teams taking a more intelligent approach to stay ahead in changing times? Here's a brief overview of nine prominent findings from our research.

**01** | **Top marketing teams win with a customer journey strategy.**
(see page 14)

High-performing marketing teams are 8.8x more likely than underperformers to strongly agree that they've adopted a customer journey strategy as part of their overall business strategy. Successful marketers are connecting with customers in new ways across mobile, email, social, and the Web. Seventy-three percent say that a **customer journey strategy has positively impacted overall customer engagement** – the second biggest priority for marketers this year.

**02** | **Top marketing teams are integrating the customer experience.**
(see page 16)

Successful marketing leaders are crossing the boundaries of business units to create a single view of the customer. High-performing marketing teams are 7.7x more likely than underperformers to strongly agree they're **leading customer experience initiatives across the business – bridging the gap between marketing, sales, and service.** Sixty-four percent of top teams also say they are excellent at creating a single view of the customer, versus only 4% of underperformers.

**03** | **Top marketing teams get smart with tech adoption.**
(see page 22)

To keep pace with a dynamic industry and continually make marketing communications smarter, 72% of top teams will increase spending on marketing tools and tech in the next two years. Fifty-three percent of **high performers qualify as heavy tech adopters,** compared to only 7% of underperformers. Top teams are more likely to extensively use marketing analytics and predictive intelligence, among other tools.

**04** | **Top marketing teams align with business leadership.**
(see page 26)

The world's best marketing teams have buy-in from company leaders. As such, marketing budgets are more likely to be prioritized. **Eighty-three percent of high performers say their executive team is completely committed to supporting the overall marketing strategy**, compared to only 31% of underperformers.

**05** | **Real-time channel orchestration strikes a chord.**
(see page 29)

Leading marketers understand the value of a cross-channel approach. In fact, top teams are 3.2x more likely than underperformers to strongly agree they've integrated their social media activity into their overall marketing strategy (3.4x more likely for integrating email marketing and 5x more likely for mobile marketing). Among **high performers who have integrated their digital marketing channels with their overall marketing, at least 95% rate the integrations as very effective or effective.**

**06** | **Mobile momentum hits a tipping point.**
(see page 30)

From 2015 to 2016, every aspect of mobile covered in this research has risen significantly in usage. This growth encompasses both mobile as a marketing platform (such as mobile apps) and mobile as a marketing channel (such as SMS). **With 98% growth in mobile app usage and 111% growth in SMS usage, a majority of marketers are now using these mainstream mobile tactics to engage customers.**

# Executive Summary
## Nine key takeaways

**07** | **Intelligent email is driving higher revenue.**
(see page 34)

As email personalization capabilities grow more sophisticated, the channel becomes even more integral for marketers to deliver a holistic customer journey. **Top teams are 4.2x more likely than underperformers to leverage predictive intelligence or data science to create personalized emails.** Forty-nine percent of marketers say email is directly linked to their business' primary revenue source – a notable jump from the 20% of marketers who said the same in 2015.

**08** | **Social sees massive ROI growth.**
(see page 38)

Last year, three of the top five areas where marketers planned to increase their spending involved social outlets. Now, those investments appear to be paying off; **75% of marketing leaders report that social is generating ROI.** Top teams are also 1.7x more likely than underperformers to align their social media marketing strategy with other social activities such as customer service, pursuing a more unified customer view.

**09** | **Advertising accelerates on social platforms.**
(see page 43)

Nearly two-thirds of marketers are boosting budgets for advertising on social platforms in 2016, making it the third largest area for increased investment. Among high performers, 80% will increase spending on advertising on social platforms. In order to create a unique experience based on real customer identity, **83% of top teams use customer data (e.g., email or phone data) to segment or target ads.**

# Introduction
## Priorities, Challenges, and Budgets

Marketing has entered the age of the customer, where customers have more information, choices, and power than ever before. The customer experience – the culmination of all brand and customer interactions – now matters more than anything. Core business tenets like customer satisfaction are progressively falling under the CMO's umbrella, expanding the breadth and depth of what marketing means in 2016. At the same time, marketers' success measures, priorities, and even challenges reflect the rising emphasis on customer experience.

**Customer satisfaction – historically, the domain of service teams – is the number one success metric for marketers today.** This is further evidence of the blurring lines between marketing, customer service, and sales. Marketing is more about building and sustaining customer relationships than merely filling the funnel.

### Customer Satisfaction Is Marketers' First Measure of Success

*For the second year in a row, customer satisfaction retains its stronghold as a top measure of marketing success.*

Customer satisfaction    35%

Revenue growth    33%

Customer acquisition    24%
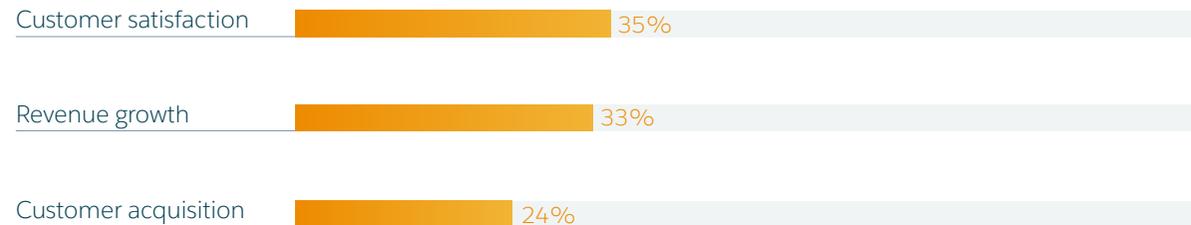
Customer engagement is a top priority for marketers this year. While brand awareness is a longstanding marketing objective that implies one-way, business-to-consumer broadcasts, customer engagement indicates the rising importance of more personal relationships with two-way communication.

## Marketers Make Customer Engagement a Top Priority

*Brand awareness has been a goal since the Mad Men days, but customer engagement indicates a modern marketer – one who's focused more on creating a personalized experience than brandishing a logo.*

| | |
|---|---|
| Brand awareness | 37% |
| Higher levels of customer engagement | 34% |
| Social media engagement | 25% |
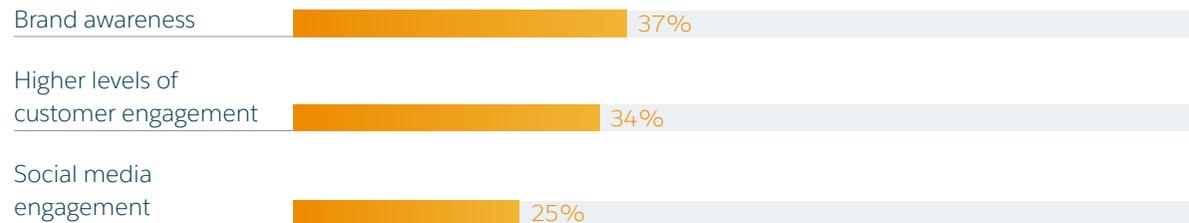
**"** **MARKETING LEADER** *perspective*

**accenture**

*"This is truly the most remarkable time to be a marketer. The way that a customer engages gives a brand the opportunity to know potentially what they want before they even ask for it. Because of the real-time nature of data, you can make a huge impact very quickly."*

– **Glen Hartman**, Accenture Interactive Global Lead Digital Marketing*

*\* Salesforce Marketing Cloud customer success video, September 2015*

## Priorities, Challenges, and Budgets

Last year, more marketers were concerned with new business development and quality of leads. This year, the emergence of customer relationships as a top challenge further illustrates the shift from marketing as a lead-generation machine to marketing as a customer-experience coordinator.

While budget ranks as the number one obstacle for moderate and underperformers, it's not in the top 10 concerns for high-performing marketers. For top teams at companies of all sizes, this speaks more to the prioritization of marketing budgets than budget size.

### Marketers Are Concerned about Building Customer Relationships

*Business challenges vary greatly between top teams and the rest. While moderate and underperformers struggle more with budget and new business development, top teams say they're challenged to keep pace with customers, produce unique content, and recruit the best talent.*

| | 1 | 2 | 3 |
|---|---|---|---|
| Top Concerns for High-Performing Teams | Keeping pace with customers | Producing unique, original content | Talent acquisition |
| Top Concerns for Moderate-Performing Teams | Budget constraints | Building deeper customer relationships | New business development |
| Top Concerns for Underperforming Teams | Budget constraints | New business development | Customer acquisition |

## Priorities, Challenges, and Budgets

In 2016, the term "digital marketing" borders on redundancy. Digital accounts for an ever-growing share of marketers' activities, channels, and budgets. **This year marks a tipping point, with marketers spending more than two-thirds (70%) of their total budget on digital marketing channels.**

In the next two years, 97% of marketing leaders plan to either further increase or maintain their level of spending on digital marketing.

Over a 10-year span – from 2011 to 2021 – we'll see 21% growth in digital marketing spending.

### Digital Takes the Lion's Share of Marketing Dollars

*By 2021, marketing leaders will spend 75% of their total budget on digital marketing versus traditional marketing.*

62%
70%
75%

**21%**
growth in digital marketing spending over a 10-year period

38%
30%
25%

**2011**
**2016**
**2021**

○ Digital marketing channels     ○ Traditional marketing channels
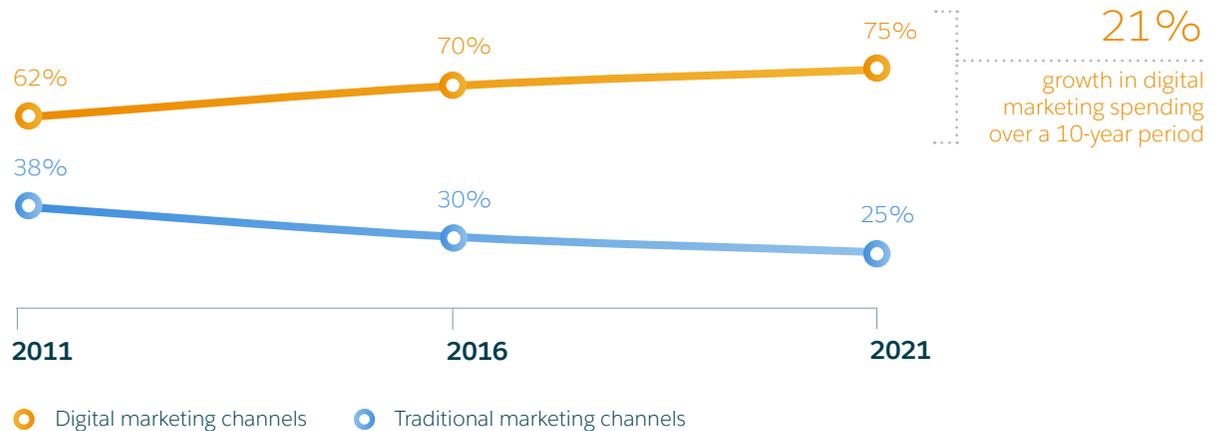
### Social and Advertising Claim Top Spots for Spending Growth

*Social continues to dominate marketing channels for increased spending over the next 12 months.*

**Percentage Who Are Increasing Spending in Each Area over the Next 12 Months**

67%
Social media marketing

67%
Social media engagement

65%
Advertising on social platforms

Salesforce Research

# Practices of High-Performing Marketing Teams

In our 2016 research, "customer journey" is defined as all interactions that customers have with a company's brands, products, or services across all touchpoints and channels. High-performing marketing teams are 8.8x more likely than underperformers to strongly agree that they have adopted a customer journey strategy as part of their overall business strategy.

But top marketers know that identifying the customer journey is an ongoing pursuit. Whether a marathon or a series of sprints, well-executed journeys must be contextual to the moment and personalized to individual customers. While 65% of high performers strongly agree their company has adopted a customer journey approach, 61% are actively mapping their journeys.

**Among high-performing teams, 88% say a customer journey strategy is critical to the success of their overall marketing.** 🐦

## Top Marketing Teams Commit to the Customer Journey

*From adopting strategy to actively mapping touchpoints, high-performing marketing leaders make the customer journey a priority.*

**Percentage Who Strongly Agree with Each Statement**
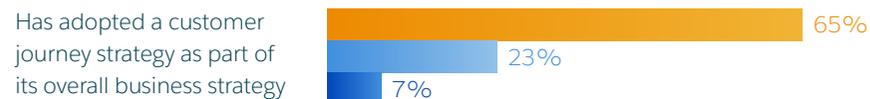
**High-performing vs. Underperforming Teams**

Has adopted a customer journey strategy as part of its overall business strategy
- 65%
- 23%
- 7%

**8.8x** more likely to strongly agree

Is actively mapping the customer journey
- 61%
- 22%
- 6%
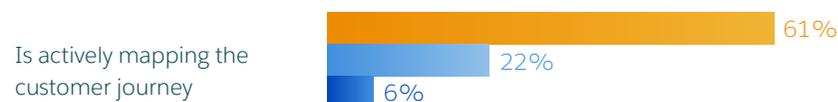
**9.7x** more likely to strongly agree

■ High performers     ■ Moderate performers     ■ Underperformers

Of those who have implemented customer journeys, more than two-thirds agree it's had a positive impact on their business. From decreasing churn rates to contributing to revenue growth, a customer journey strategy is the tide lifting all marketers' boats.

Seventy percent of marketing leaders have seen a positive impact on their customers' willingness to recommend products or services. **Seventy-three percent say that a customer journey strategy has positively impacted overall customer engagement – the second biggest priority for marketers this year.**

## Customer Journey Adoption Drives Powerful, Positive Results

*Adopting a customer journey strategy has overwhelmingly positive business impacts for the majority of marketing leaders.*

### Percentage Who Have Adopted a Customer Journey Strategy and Strongly Agree or Agree with Each Statement

Has positively impacted overall customer engagement — 73%

Has positively impacted customers' willingness to recommend products and services — 70%

Has positively impacted revenue growth — 70%

Has positively impacted customer satisfaction (CSAT) scores — 67%

Has positively impacted customer churn rates — 65%

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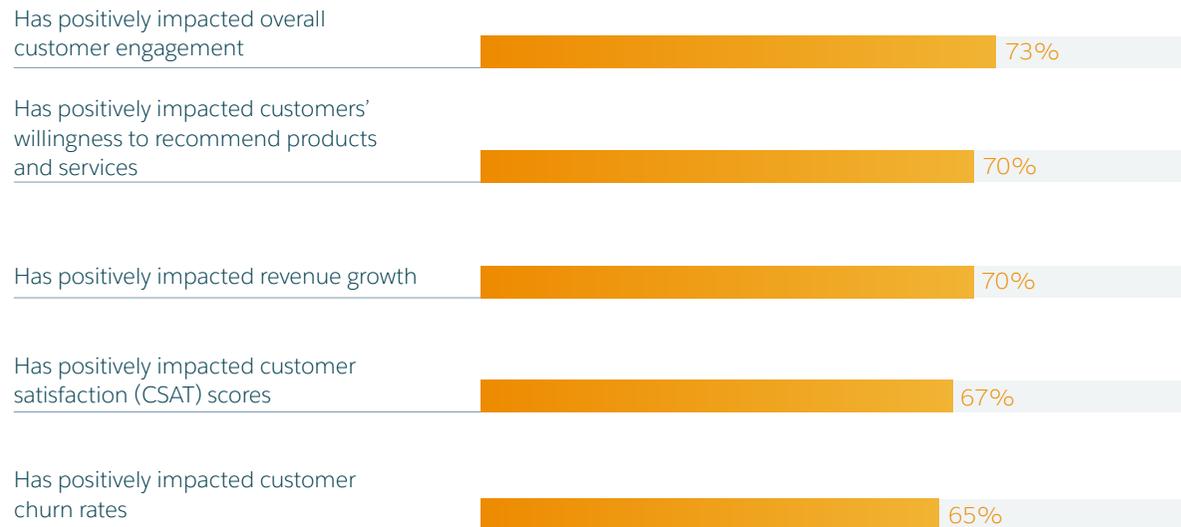
**" MARKETING LEADER** *perspective*

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*"Marketing keeps evolving, because customers demand it. Whether you're running an onboarding campaign or re-engaging with longtime advocates, customers always want to feel known and uniquely recognized. Customers have never liked feeling like a faceless number, but today's customer unequivocally expects more. It takes a genuine intention to truly understand your customer, a commitment to marketing intelligence and relentless dedication to true personalization, to deliver on that expectation."* – **Maggie Lang**, Senior Director, Marketing

Today's marketing teams are increasingly taking on broader customer-facing roles than tradition dictates. Successful marketing leaders are crossing boundaries between business units in order to orchestrate all customer touchpoints into a seamless experience. Top performers are leading this shift to attain a single view of the customer.

**High-performing marketing teams are 7.7x more likely than underperformers to strongly agree they're leading customer experience initiatives across the business.** Often, touchpoints of the customer experience live outside of marketing in either sales or customer service. Top marketers are knocking down the silos to gain a single view – and, more importantly, to deliver a unified experience for customers. High performers are also 7.8x more likely to strongly agree that they're implementing digital transformations across the company.

## High-Performing Marketers Lead the Customer Experience

*Although the customer experience encompasses multiple business units, top marketers are paving the way and owning this single, shared view of the customer.*

**Percentage Who Strongly Agree with Each Statement**
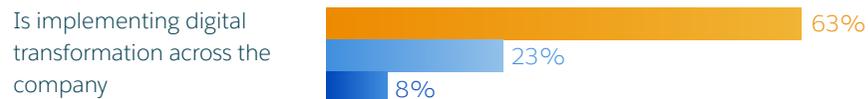
**High-performing vs. Underperforming Teams**

Is implementing digital transformation across the company
63%
23%
8%

**7.8x**
more likely to strongly agree

Is leading customer experience initiatives across the business
58%
21%
8%

**7.7x**
more likely to strongly agree

■ High performers    ■ Moderate performers    ■ Underperformers

For marketers to lead customer experiences across business units, it requires companywide support and collaboration. There's a growing corporate mindset shift to build bridges between departments, with the goal of ensuring a holistic approach to the customer experience.

**Among high-performing marketing teams, 63% are excellent at collaborating with other business units – bringing together marketing, sales, service, IT, and other executives.**

## Collaboration Is Key to the Customer Experience

*High-performing marketing leaders are 17.1x more likely than underperformers to be excellent at working with other business units.*

**Percentage Who Excel at Collaborating with Other Business Units**

High performers

Moderate performers

Underperformers

4%

18%

63%

High-performing vs. Underperforming Teams

# 17.1x

more likely to be excellent at collaborating with other business units

10%

20%

30%

40%

50%

60%
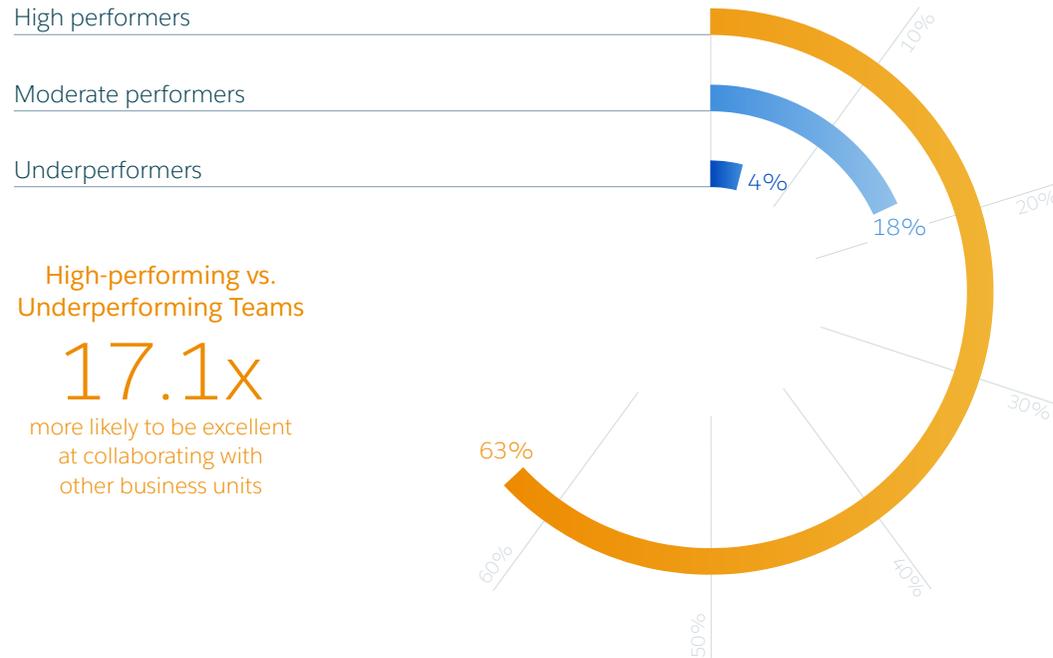
High performers are 13.7x more likely than underperformers to strongly agree they've integrated business systems to create a single view of the customer.

**Sixty-four percent of high performers also say they are excellent at creating a single view of the customer, versus only 4% of underperformers.** 🐦

## Top Marketing Teams Create a Single View of the Customer

*High performers don't see channels as barriers and are more likely to obtain a single view of the customer.*

**Percentage Who Excel at Integrating Business Systems**

High performers

Moderate performers

Underperformers

4%

21%
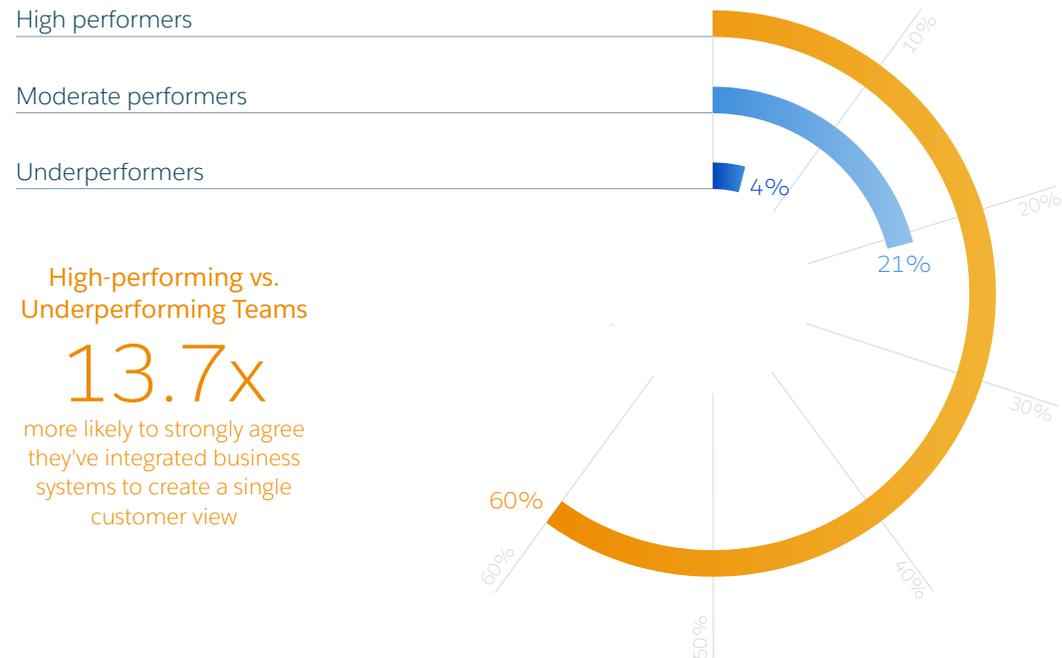
High-performing vs. Underperforming Teams

# 13.7x

more likely to strongly agree they've integrated business systems to create a single customer view

10%
20%
30%
40%
50%
60%
60%

Top teams report hugely positive results from their customer experience initiatives across business units. In fact, **high performers are 34.4x more likely than underperformers to say they are excellent at creating personalized omni-channel customer experiences across all business units.**

A unified customer experience across channels and touchpoints – whether marketing, sales, service, or even product – is more important than ever. Companies that are achieving that consolidated experience have a jump on the competition in the eyes of their customers.

## Top Teams Excel at Creating Omni-Channel Experiences

*The most successful marketing leaders are working across business units to deliver a personalized omni-channel experience for customers.*

**Percentage Who Excel at Creating Personalized Omni-Channel Customer Experiences across All Business Units**
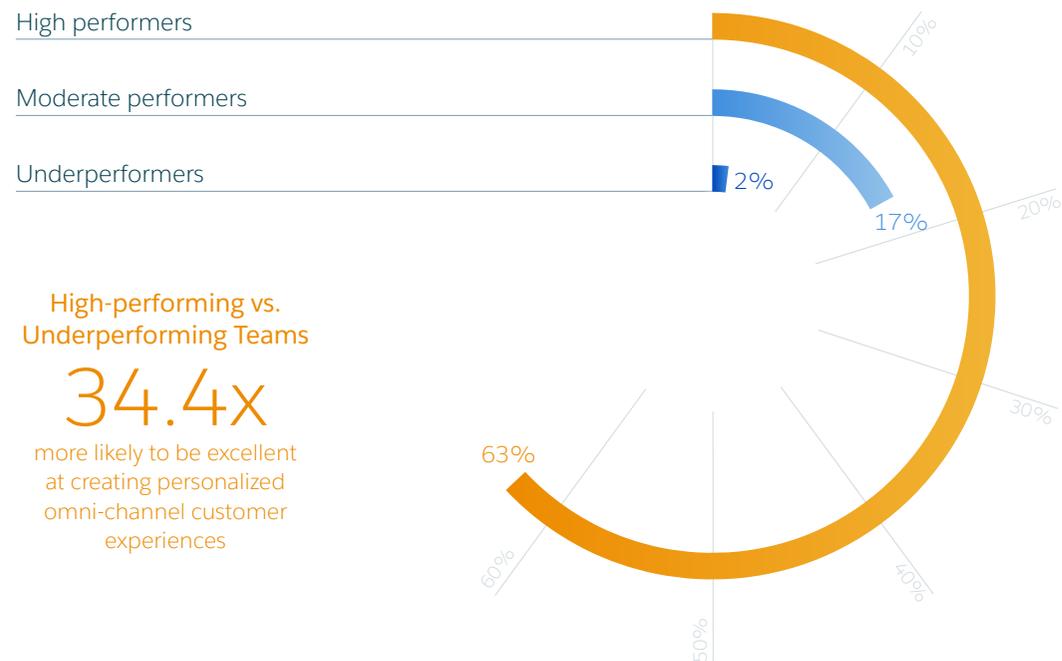
High performers

Moderate performers

Underperformers

2%

17%

63%

High-performing vs. Underperforming Teams

# 34.4x

more likely to be excellent at creating personalized omni-channel customer experiences

A large part of aiding initiatives between business units is having the right tools to encourage collaboration. When it comes to marketing and sales in particular, top teams stand out in a crucial way.

**High performers are 3.3x more likely than underperformers to use CRM tools extensively, giving marketing, sales, and service teams a shared, single view of the customer.** Furthering the gap between performance levels, 35% of underperforming marketing teams say they have no plans to use CRM tools in the future.

## Top Marketers Lean on CRM Tools

*Since a single purchase is only a small part of the customer journey, it's increasingly important for marketing and sales teams to work together to manage the customer relationship.*

**High-performing vs. Underperforming Teams**

High performers                 82%                      9%

Moderate performers             66%                      18%

Underperformers                 44%                      21%

**3.3x**
more likely to
be extensively using
CRM tools

Currently use CRM tools          Piloting/plan to use CRM tools
                                 in the next 12 months
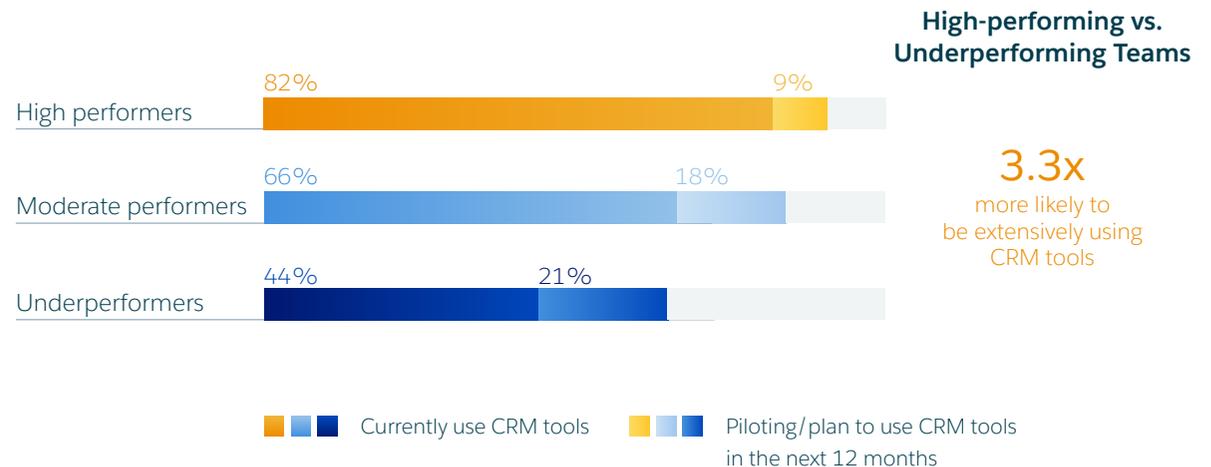
# Spotlight
## Predictive Intelligence Fuels a Smarter View of the Customer

Predictive intelligence tools are making it easier for marketers to track customer behavior and use insights to create highly personalized interactions. In fact, **top teams are 3.6x more likely to strongly agree that predictive intelligence and data science are important to their overall marketing strategy.** Seventy-nine percent of high performers currently use predictive intelligence – and 49% report extensive use.

Top teams are also 7.2x more likely than underperformers to extensively use Web personalization. By collecting customer data in real time, these marketers apply what they know about individuals to tailor the online customer experience.

### Top Teams Leverage Predictive Intelligence

*High performers turn to predictive tech to understand customer behaviors and inform future marketing communications.*

**Percentage Who Extensively Use Predictive Intelligence**

| | |
|---|---|
| High performers | 49% |
| Moderate performers | 18% |
| Underperformers | 5% |
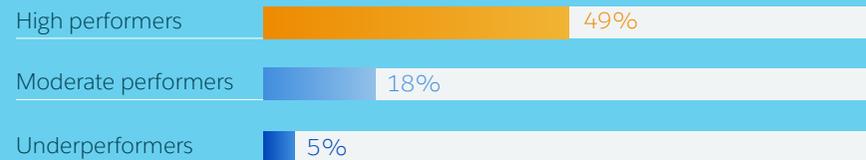
**High-performing vs. Underperforming Teams**

**10.7x**

more likely to extensively use predictive intelligence

### High Performers Personalize Web Experiences

*Successful marketers are gathering real-time customer data and preferences to create a more personalized Web experience.*

**Percentage Who Extensively Use Web Personalization**

| | |
|---|---|
| High performers | 55% |
| Moderate performers | 27% |
| Underperformers | 8% |
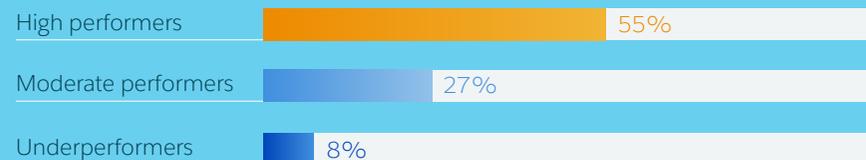
**High-performing vs. Underperforming Teams**

**7.2x**

more likely to extensively use Web personalization

New technology and tools play a significant role in the day-to-day operations of high-performing marketing organizations. Top teams are investing more heavily than others in these areas. Seventy-two percent of high performers will increase spending on marketing tools and technology in the next two years. Among this group, 48% will increase spending substantially.

While high performers lead the pack, this trend isn't limited to top teams. **Among marketers at all performance levels, 63% will increase spending on marketing tools and technology over the next two years.** 🐦

## Tools and Tech Attract Larger Investments from Top Marketers

*In order to keep pace with the dynamic marketing industry and support smarter marketing communications, high-performing teams are investing in tools and tech.*

**Percentage Who Are Substantially Increasing Spending on Marketing Tools and Tech**

High performers

Moderate performers

Underperformers

17%    21%

10%    20%    30%    40%

High-performing vs.
Underperforming Teams

# 2.8x

more likely to substantially increase spending on marketing tools and technology

48%
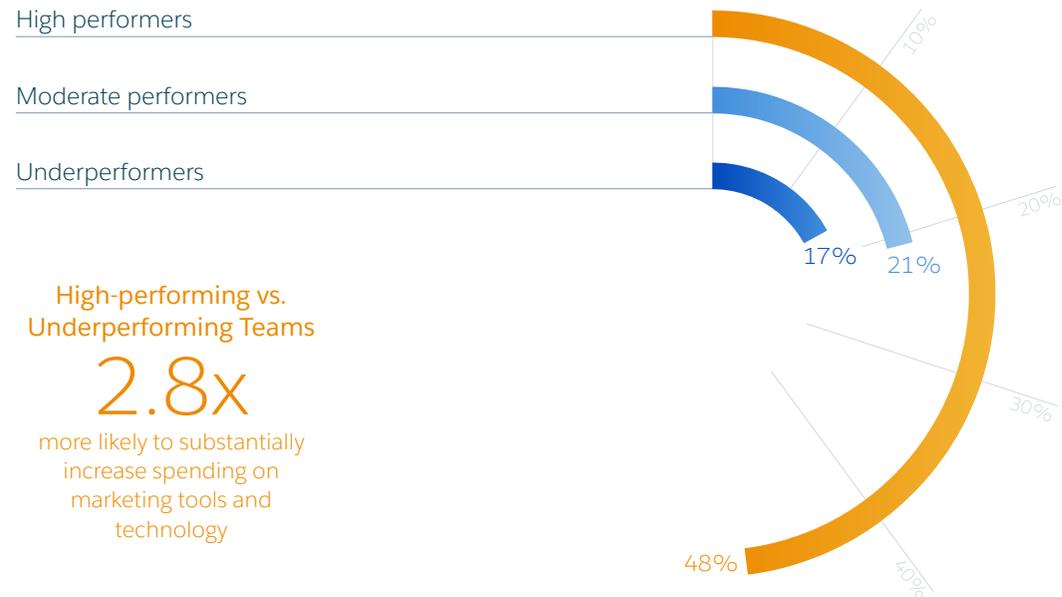
When it comes to managing the customer experience, top marketing teams are maximizing tools and technologies to ensure a single view of the customer.

Fifty-three percent of high performers qualify as heavy tech adopters, compared to only 7% of underperformers. **On average, top teams use more than twice the number of tools and technologies that underperformers use.**

## High Performers Are Heavy Tech Adopters

*High-performing marketing teams are more likely than moderate and underperformers to be heavy tech adopters.[2]*

**Adoption Rates of Marketing Tools and Technologies**

| | Heavy adoption | Average adoption | Minimal adoption |
|---|---|---|---|
| High-performing teams | 53% | 40% | 8% |
| Moderate-performing teams | 22% | 58% | 20% |
| Underperforming teams | 7% | 41% | 52% |

■ Heavy adoption   ■ Average adoption   ■ Minimal adoption
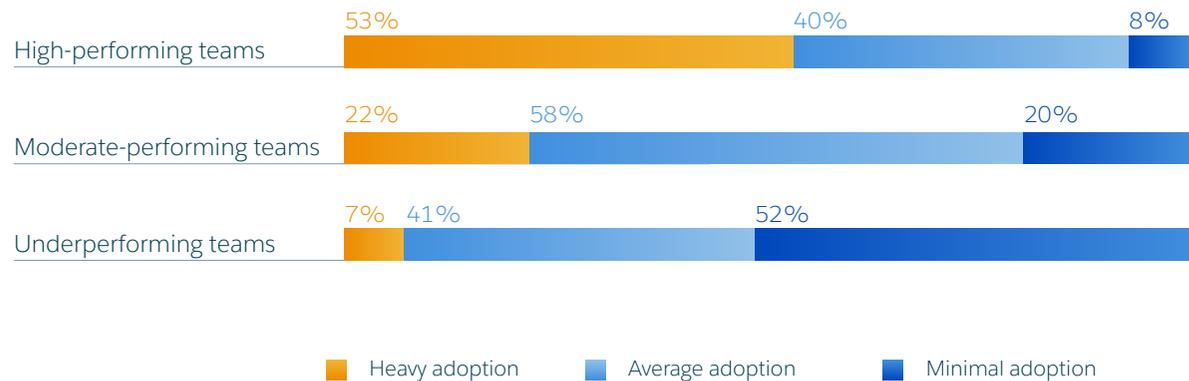
[2] *Heavy and minimal tech adoption are defined as above or below one standard deviation from the average number of functionalities currently used. For more information, see page 60.*

**❝ MARKETING LEADER** *perspective*

*"With the new eCRM technology and tools available to companies today, it's easier for marketers to focus on one of the most important aspects of the business – the customer. We can now begin to provide an eCRM customer experience that's in line with what the customer wants."*

– **Bernie Fussenegger**, Director, Digital Marketing

Successful marketing teams are not only using more tech – they're notably using more advanced types of tech. From data segmentation to marketing automation to predictive intelligence, **high performers are at least 4.2x more likely than underperformers to be using these types of tools and technologies.**

Top teams are also at least 2.4x more likely to say these tools and technologies are very effective at creating a cohesive customer journey.

## High Performers See the Impact of Advanced Tech

*Compared to underperformers, high performers are significantly more likely to extensively use these tools and technologies.*

**Percentage Who Are Extensively Using Each Tool or Technology**
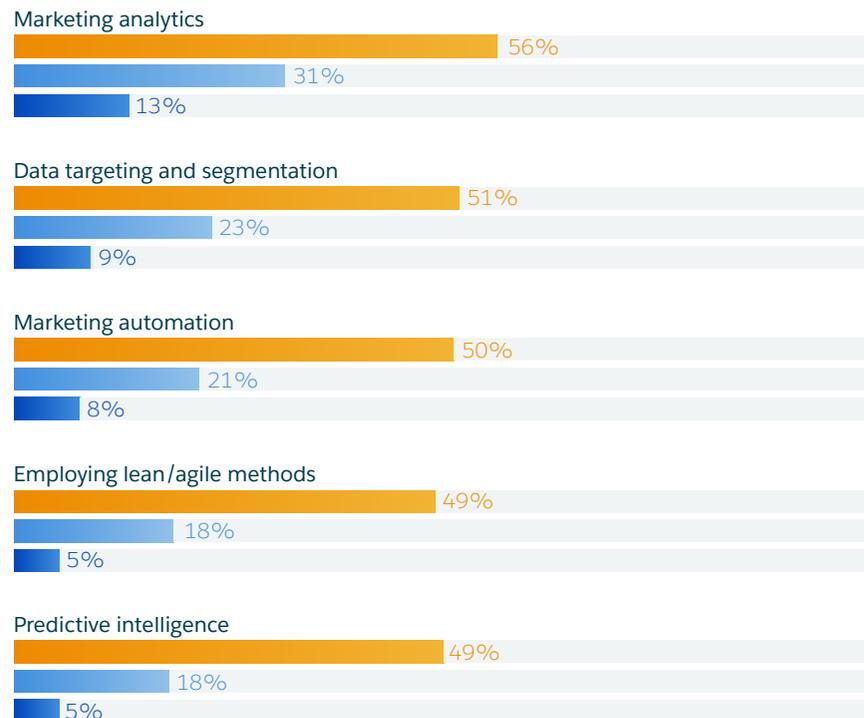
**High-performing vs. Underperforming Teams**

Marketing analytics
- 56%
- 31%
- 13%

**4.2x**
more likely to be extensively using

Data targeting and segmentation
- 51%
- 23%
- 9%

**5.8x**
more likely to be extensively using

Marketing automation
- 50%
- 21%
- 8%

**6.7x**
more likely to be extensively using

Employing lean/agile methods
- 49%
- 18%
- 5%

**9.5x**
more likely to be extensively using

Predictive intelligence
- 49%
- 18%
- 5%

**10.7x**
more likely to be extensively using

■ High performers    ■ Moderate performers    ■ Underperformers

# Spotlight
## New Frontiers for Top Marketers

High performers jump at the chance to try new things and explore what works. These early-adoption habits are paying off.

Many top marketing teams are seeing success in newer outlets. **The Internet of Things (IoT) is one such area for opportunity, where high performers are 15.4x more likely than underperformers to be extensively using it.**

### Emerging Marketing Tech Is Proving Worthy of Investment

*High-performing teams are at least 13.7x more likely than underperformers to be pioneering marketing use cases with beacon technology, IoT, podcasting, and wearables. Among them, at least 82% give a very effective or effective rating.*
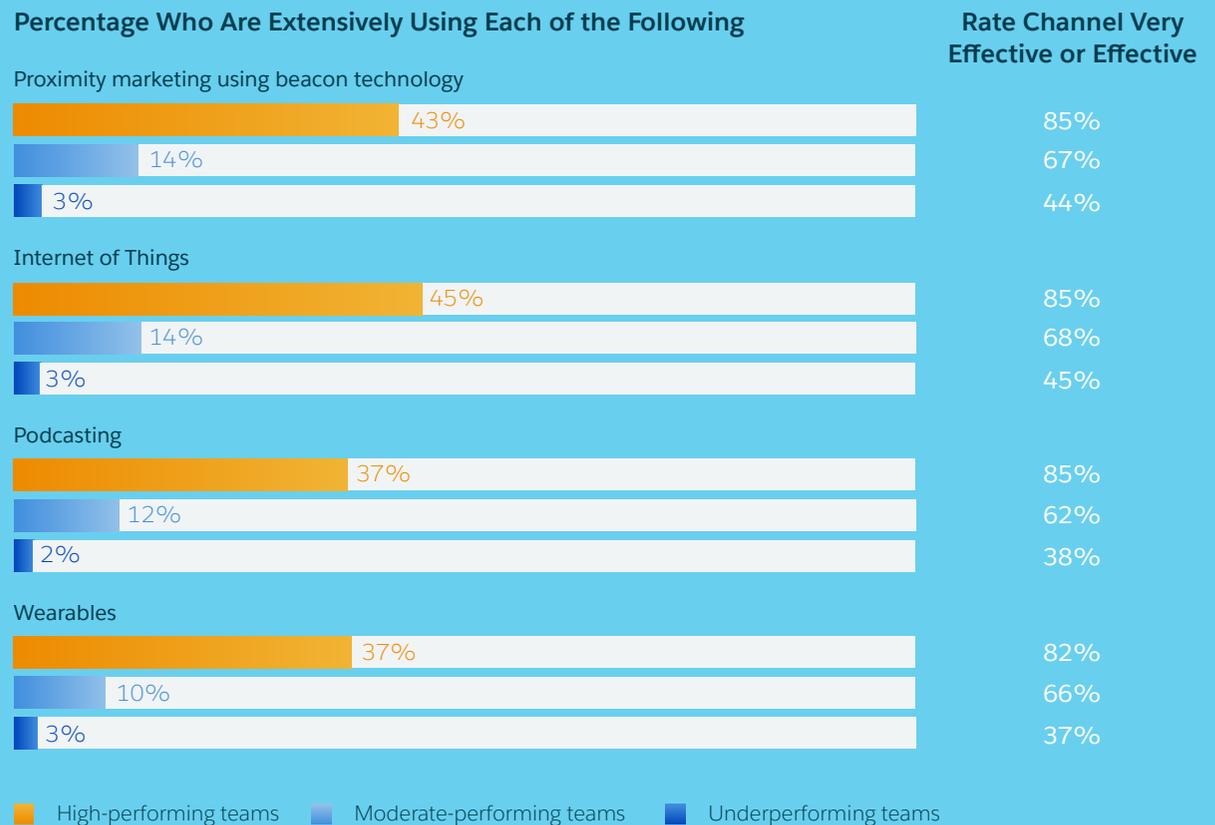
**Percentage Who Are Extensively Using Each of the Following**

**Rate Channel Very Effective or Effective**

Proximity marketing using beacon technology

| | |
|---|---|
| 43% | 85% |
| 14% | 67% |
| 3% | 44% |

Internet of Things

| | |
|---|---|
| 45% | 85% |
| 14% | 68% |
| 3% | 45% |

Podcasting

| | |
|---|---|
| 37% | 85% |
| 12% | 62% |
| 2% | 38% |

Wearables

| | |
|---|---|
| 37% | 82% |
| 10% | 66% |
| 3% | 37% |

■ High-performing teams    ■ Moderate-performing teams    ■ Underperforming teams

Salesforce Research

The world's best marketing teams have buy-in from company leaders. High performers are 2.6x more likely than underperformers to say their executive team is completely committed to supporting the overall marketing strategy.

In fact, **83% of high-performing marketers have the executive team's complete commitment to their marketing strategy.** 🐦

## Executive Team Commitment Makes a Difference

*High-performing marketing teams are supported from the top down. Eighty-three percent of top teams have their executive team's complete commitment to their marketing strategy.*

High performers
Moderate performers
Underperformers

83%

31%

42%

High-performing vs. Underperforming Teams

2.6x

more likely to say their executive team is completely committed to the overall marketing strategy
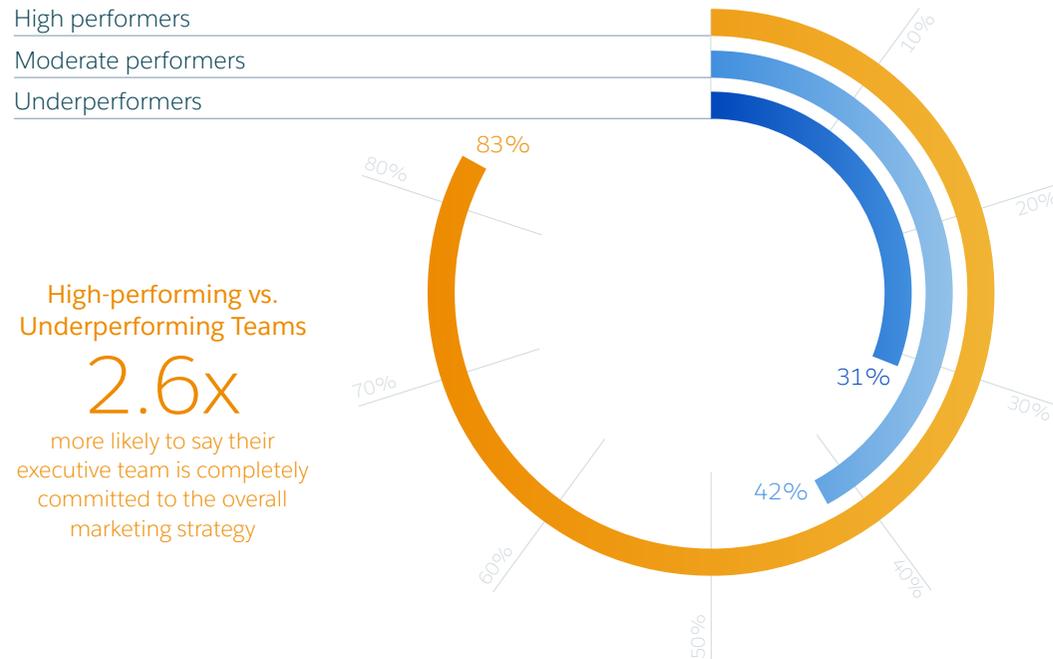
When the commitment to marketing starts at the top, companies prioritize marketing and walk the talk with their investments.

High performers are 2.8x more likely than underperformers to be substantially increasing their spending on marketing tools and tech over the next two years.

## Top Teams Prioritize Marketing Budgets

*High performers are more likely to be substantially increasing spending on digital marketing as well as marketing tools and technology.*

### Percentage Substantially Increasing Spending on Marketing Tools and Technology
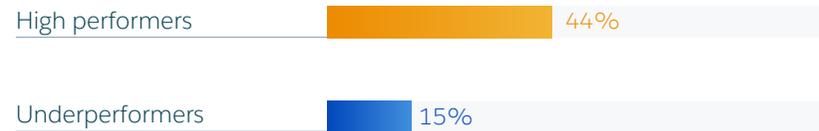
High performers — 48%

Underperformers — 17%

### Percentage Substantially Increasing Spending on Digital Marketing

High performers — 44%

Underperformers — 15%

### High-performing vs. Underperforming Teams

**2.8x**
more likely to substantially increase spending on marketing tools and technology

**3x**
more likely to substantially increase spending on digital marketing

# Key Insights
by Marketing Channel

"Your customers are cross-channel so your marketing must be cross-channel." It's been said countless times because it's true – but even from the marketer's point of view, the lines between channels grow blurrier by the minute. **A perfect example of this convergence is that 82% of high performers consider advertising on social platforms to be part of their mobile marketing efforts.**

Leading marketers understand the value of a cross-channel approach. In fact, top teams are 3.2x more likely than underperformers to strongly agree they've integrated their social media activity into their overall marketing strategy. High performers are also 3.4x more likely to strongly agree they've integrated their email marketing – and 5x more likely to have integrated their mobile marketing – with their overall marketing.

*Data reported in this section is out of a base of respondents*

*that use each of the corresponding digital marketing channels.*

## Integrating Channels Proves Highly Effective for Top Teams

*High performers win by aligning their digital channels, as seen by the tremendous effectiveness ratings. Among top teams who have integrated their digital marketing channels with their overall marketing, at least 95% rate the integrations as very effective or effective.*

**Percentage Who Strongly Agree with Each Statement**

**Rate Channel Very Effective or Effective**

Has integrated our mobile marketing strategy into our overall marketing strategy
- 60%
- 25%
- 12%

96%
86%
68%

Has integrated our email marketing strategy into our overall marketing strategy
- 64%
- 29%
- 19%

95%
86%
59%

Has integrated our social media marketing strategy into our overall marketing strategy
- 63%
- 28%
- 20%

98%
88%
62%

■ High-performing teams   ■ Moderate-performing teams   ■ Underperforming teams

From 2015 to 2016, every aspect of mobile usage covered in this report has risen significantly. This growth encompasses both mobile as a marketing platform (such as mobile apps) and mobile as a marketing channel (such as SMS). With 98% growth in mobile app usage and 111% growth in SMS usage, a majority of marketers are now using these mobile tactics to engage customers.

If the marketers who are planning to pilot push messages and mobile tracking in 2016 actually do so, these tactics could also reach a critical mass by 2017.

This year's survey also asked marketers about multimedia messaging services (MMS) and mobile app inboxes for the first time. For MMS, 52% of marketers are currently using and another 17% plan to pilot this year. For the newer mobile app inbox, 47% are currently using and another 19% will pilot.

*All data in this section represents respondents who use mobile as part of their marketing strategy.*

## Mobile Marketing Hits Triple-Digit Growth

*The use of mobile marketing is multiplying year over year. Mobile push notifications increased 145% in usage from 2015 to 2016.*
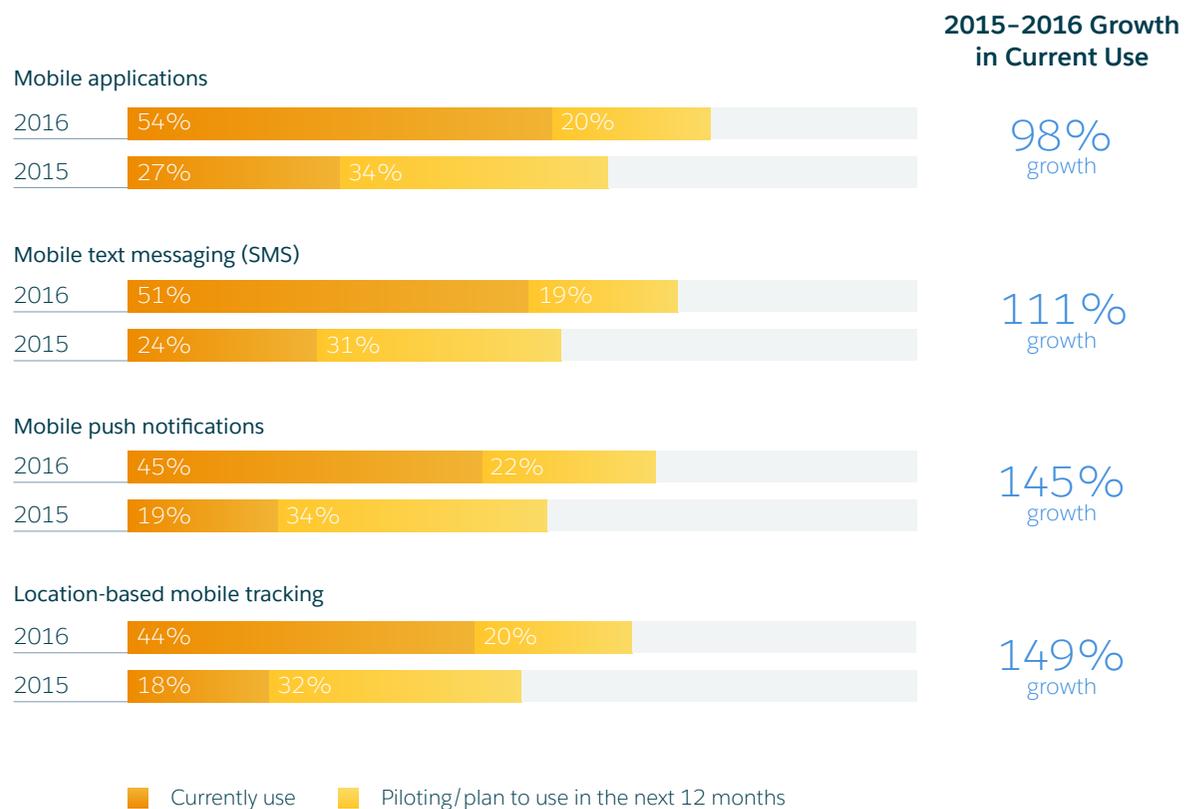
**2015–2016 Growth in Current Use**

**Mobile applications**
| 2016 | 54% | 20% |
| 2015 | 27% | 34% |

**98%** growth

**Mobile text messaging (SMS)**
| 2016 | 51% | 19% |
| 2015 | 24% | 31% |

**111%** growth

**Mobile push notifications**
| 2016 | 45% | 22% |
| 2015 | 19% | 34% |

**145%** growth

**Location-based mobile tracking**
| 2016 | 44% | 20% |
| 2015 | 18% | 32% |

**149%** growth

■ Currently use    ■ Piloting/plan to use in the next 12 months

Digging deeper, the reasons behind the steep mobile growth become more clear. **Seventy-nine percent of marketing leaders agree that mobile marketing – inclusive of SMS, push notifications, mobile apps, or location-based functionality – is core to their business.** 🐦

Among this group, 50% say it's directly linked to their business' primary revenue source. Another 77% say mobile generates ROI, compared to only 31% of marketers who agreed in 2015.

*All data in this section represents respondents who use mobile as part of their marketing strategy.*

## Mobile ROI Soars in 2016

*The percentage of marketers who are realizing a return on their mobile investment jumped 147% from 2015 to 2016.*

**Percentage Who Agree with Each Statement about Mobile Marketing[3]**

| | | | | | |
|---|---|---|---|---|---|
| **2016** | 38% | 39% | 18% | 4% | 1% |
| **2015** | 9% | 22% | 33% | 26% | 4% | 6% |

- 🟧 Mobile marketing generates significant ROI
- 🟨 Mobile marketing generates some ROI
- 🟦 Mobile marketing will eventually generate ROI
- 🟦 Mobile marketing indirectly generates ROI
- 🟦 Mobile marketing does not generate ROI
- ⬜ Unsure
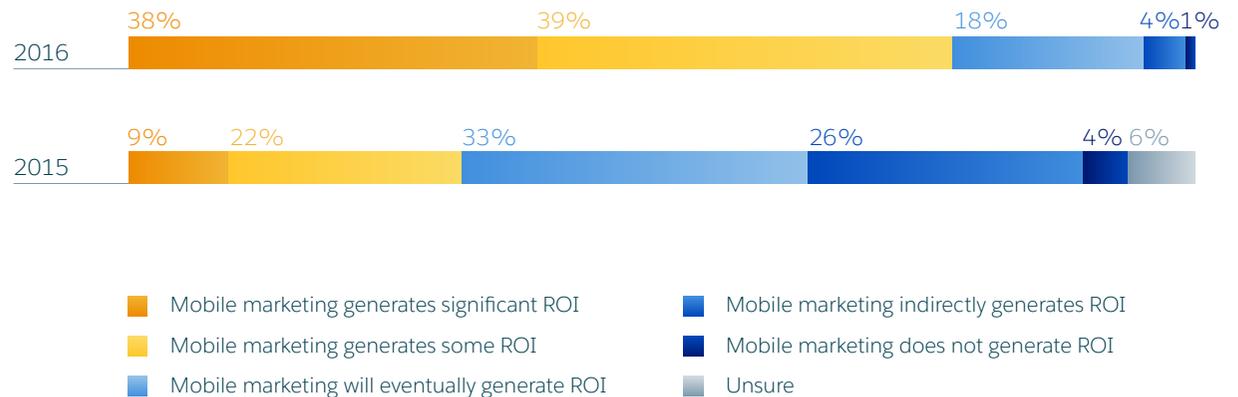
[3] *"Unsure" was not an answer option in the 2016 survey.*

While exclusive deals and loyalty programs rank as the most effective mobile campaign types, there's a four-way tie for third place. Three of these – browse retargeting, post-purchase onboarding, and post-purchase communications – reflect the extreme omni-channel capabilities of mobile marketing, tying online or in-store events into triggered mobile messages.

*All data in this section represents respondents who use mobile as part of their marketing strategy.*

## Marketers Find Value in a Variety of Mobile Campaigns

*Marketers say exclusive deals and loyalty programs are the two most effective mobile campaigns in 2016, but rate many campaign types as worthwhile. Mobile gives marketers a chance to reach customers in the moment with specific, personalized offers.*

**Percentage Who Rate Each Mobile Campaign Type as Very Effective or Effective[4]**

| Campaign Type | Percentage |
|---|---|
| Exclusive deals | 80% |
| Loyalty | 78% |
| Browse retargeting | 75% |
| Post-purchase onboarding | 75% |
| Post-purchase | 75% |
| Promotional content | 75% |
| Holiday | 74% |
| Partner-onboarding journeys | 74% |
| Location-based campaigns | 74% |

[4] *This chart is a partial list. For the complete list, see page 63.*

Top marketing teams are more advanced in their approach to mobile – from aligning campaigns to tracking analytics. They're nearly 2x more likely than underperformers to use deep links that drive users to directly download their app.

**High performers are also 1.8x more likely to align their mobile campaigns to email campaigns, recognizing the cross-promotion opportunities between these two channels.**

*All data in this section represents respondents who use mobile as part of their marketing strategy.*

## High Performers Are Masters of Mobile

*Top marketing teams are skilled at creating, tracking, and measuring mobile efforts. Eighty-three percent of high performers track mobile analytics for mobile apps as well as mobile versus desktop website navigation.*

**Percentage Who Use Each Mobile Strategy**

| | Underperforming | Moderate-performing | High-performing |
|---|---|---|---|
| Track mobile analytics for mobile app(s) | 54% | 67% | 83% |
| Align mobile campaigns to email campaigns | 46% | 68% | 81% |
| Track mobile versus desktop website navigation | 51% | 65% | 83% |
| Use deep links that take users directly to the app store to download app | 42% | 64% | 81% |

● High-performing teams    ● Moderate-performing teams    ● Underperforming teams
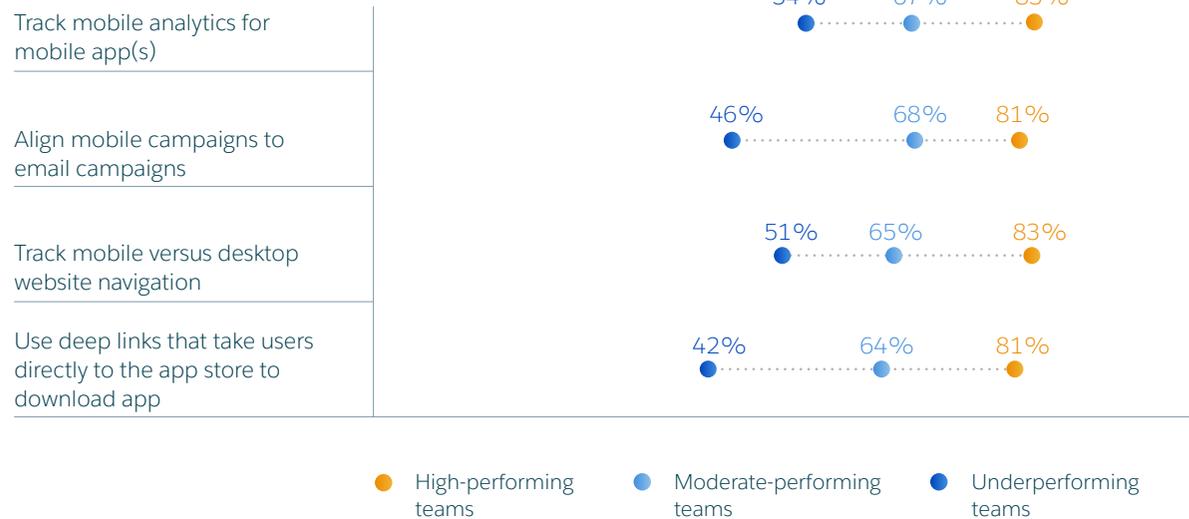
# Key Insights by Marketing Channel
## Intelligent Email Is Driving Higher Revenue

As email personalization capabilities grow more sophisticated, the channel becomes even more integral for marketers to deliver a holistic customer journey. Eighty percent of marketers agree that email is core to their business.

Predictive technology is breathing new life into established marketing channels such as email.

**Top teams are 4.2x more likely than underperformers to leverage predictive intelligence or data science to create personalized emails. ✦**

Gaining a deeper, behavior-based understanding of customers allows marketers to be smarter in creating next steps along the customer journey.

*All data in this section represents respondents who use email as part of their marketing strategy.*

### Data Science Expands Email's Horizons

*Established channels like email are experiencing a fresh wave of marketing personalization possibilities with predictive intelligence and data science.*

**Percentage Who Leverage Predictive Intelligence or Data Science to Personalize Emails**

High performers

Moderate performers

Underperformers

10%

24%

40%

High-performing vs. Underperforming Teams

# 4.2x

more likely to leverage predictive intelligence or data science to personalize emails
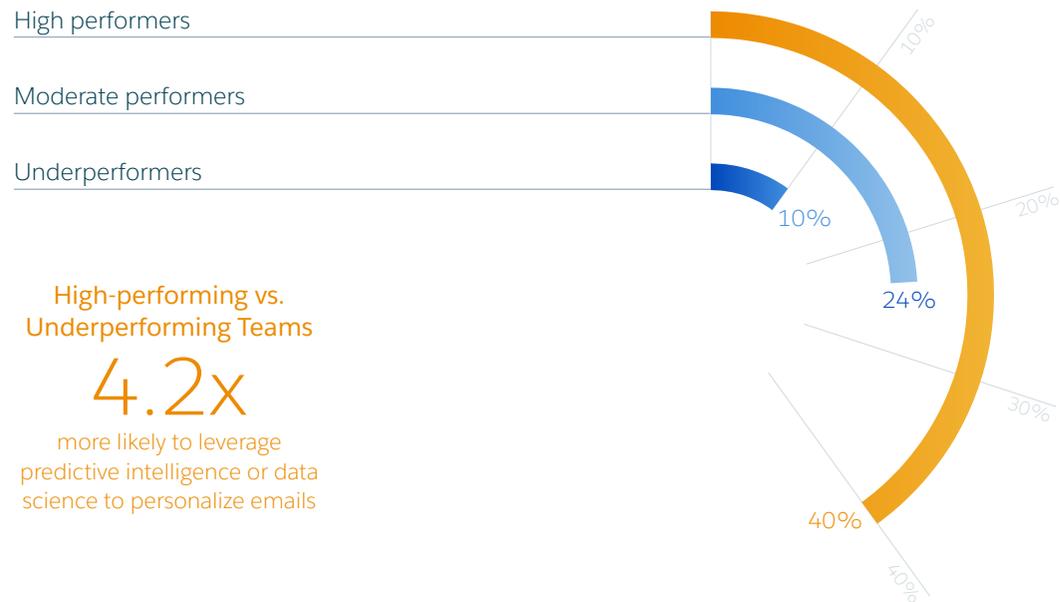
Return on investment (ROI) for email is another area that's seen an uptick over the last year. **While 54% of marketers said email directly generated ROI in 2015, that percentage rose to 79% in 2016.**

Among those who agree email is core to their business, nearly half (49%) say email is directly linked to their business' primary revenue source – a notable jump from the 20% of marketers who said the same in 2015.

*All data in this section represents respondents who use email as part of their marketing strategy.*

## More Marketers Agree Email Generates Significant ROI

*Email marketing made a significant leap over the last year as an ROI-producing channel.*

**Percentage Who Agree with Each Statement about Email Marketing** [4]

**2016**
36% | 44% | 13% | 6% | 1%

**2015**
21% | 32% | 20% | 18% | 3% | 5%

- ◼ Email marketing generates significant ROI
- ◼ Email marketing generates some ROI
- ◼ Email marketing will eventually generate ROI
- ◼ Email marketing indirectly generates ROI
- ◼ Email marketing does not generate ROI
- ◼ Unsure
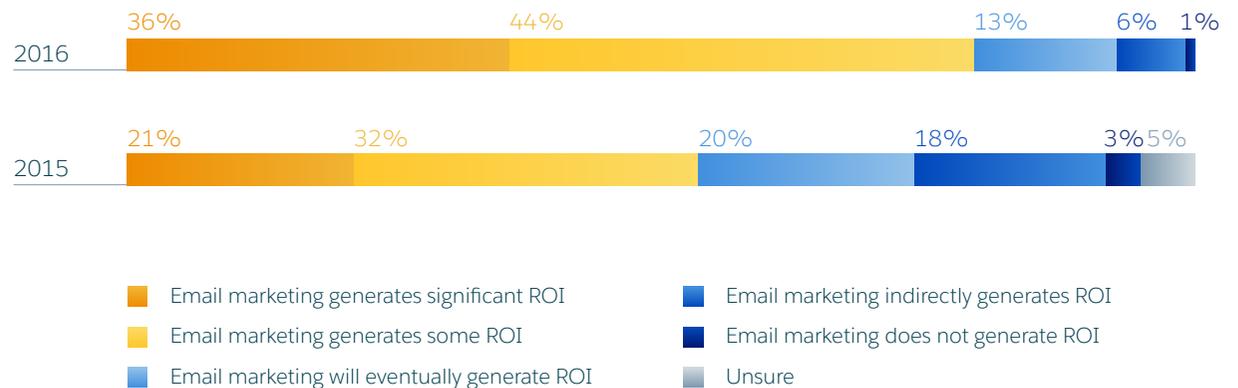
[4] *"Unsure" was not an answer option in the 2016 survey.*

Further illustrating the cross-channel nature of marketing channels in 2016, social and mobile appear in the top five most effective email campaign types.

Marketing leaders find the most value in email campaigns used to build customer loyalty, although there's a wide variety of campaign types with high effectiveness ratings.

*All data in this section represents respondents who use email as part of their marketing strategy.*

## Effective Email Campaign Types Are a Diverse Mix

*While loyalty programs and exclusive deals are the most effective email campaigns, marketers' toolkits are broader than ever with high levels of effectiveness across the board.*

### Percentage Who Rate Each Email Campaign Type as Very Effective or Effective[5]

| Campaign Type | |
|---|---|
| Loyalty | 79% |
| Exclusive deals | 78% |
| Social selling | 77% |
| Promotional content | 77% |
| Mobile opt-in | 76% |
| Welcome series | 75% |
| Browse retargeting | 75% |
| Partner-onboarding journeys | 75% |
| Video ads | 75% |
| Event or invitation | 75% |
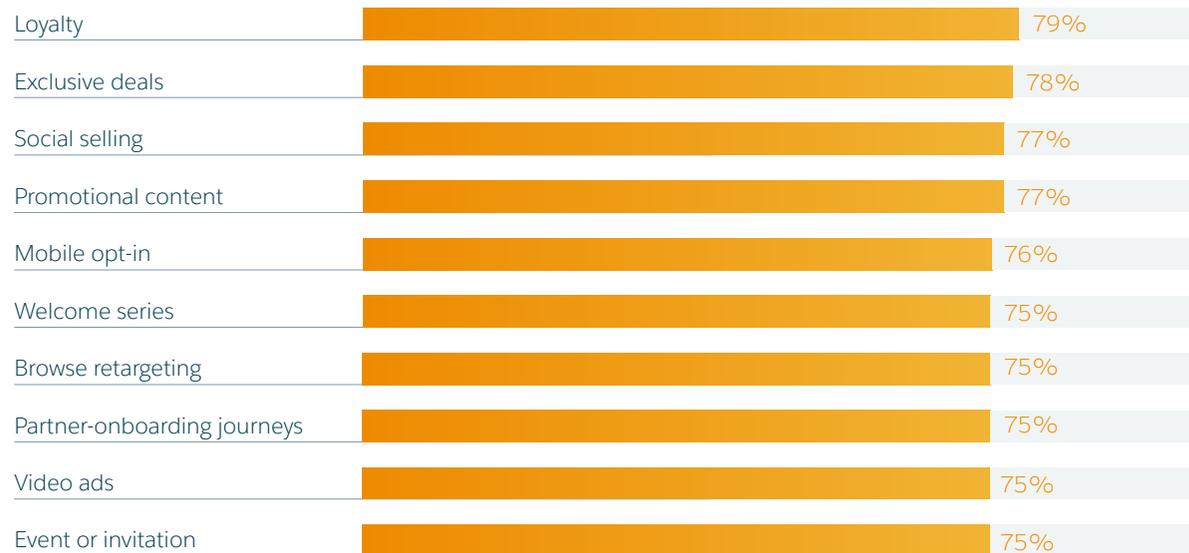
[5] This chart is a partial list. For the complete list, see page 65.

## MARKETING LEADER *perspective*

**Time Inc.**

*"More than ever, marketers need the right tools that will enable them to send highly targeted, dynamic messages to their audiences. Savvy consumers expect it. If you aren't moving in that direction, it will be increasingly difficult to create relevant and impactful marketing."*

– **Stephanie Solomon**, Vice President, Consumer Marketing & Revenue

Unsurprisingly, top marketing teams are more advanced in their email marketing strategies. They're more likely to take advantage of marketing automation tactics like triggered emails – although overall adoption in these areas remains relatively low. They're also more likely to segment and target emails to reach customers with personalized content.

Meeting customers' real-time expectations, **high-performing teams are 2.3x more likely than underperformers to trigger personalized emails in real time based on events.**

*All data in this section represents respondents who use email as part of their marketing strategy.*

## High Performers Take a More Sophisticated Approach to Email

*Top teams go beyond basic email marketing, using predictive intelligence, personalization, and cross-channel inputs to customize messages.*

**Percentage Who Use Each Strategy**

Include marketing content in transactional emails — 52% | 77% | 90%

Personalize emails with subscriber fields — 47% 55% 63%

Segment and send different emails to different groups — 44% 48% 51%

Send the same email with unique content based on audience segment — 21% | 37% | 48%

Leverage predictive intelligence or data science to create personalized emails — 10% | 24% | 40%

Trigger personalized emails in real time based on events — 14% | 24% 32%

Trigger customized cross-channel interactions based on profile, preference, or behavior — 7% | 16% | 25%

● High-performing teams      ● Moderate-performing teams      ● Underperforming teams

In 2015, three of the top five areas where marketers planned to increase their spending involved social outlets. This year, those investments appear to be turning a profit. The link between social marketing and revenue increased 3x over the last year, with nearly half (48%) of marketers reporting that social media marketing is directly linked to their business' primary revenue source.

Now, **82% of marketers agree that social media marketing is core to their business.** 🐦

Last year, 27% of marketers said social would eventually generate ROI and 28% said it already generated ROI, accounting for 55% of all respondents. This year, 75% of respondents report that social is currently generating ROI.

*All data in this section represents respondents who use social as part of their marketing strategy.*

## Social Leaps Ahead as an ROI Creator

*Social media is an increasingly important tool for marketing ROI. Thirty-nine percent of marketers report significant ROI generated from social media marketing, compared to only 9% in 2015.*

**Percentage Who Agree with Each Statement about Social Media Marketing**[6]

2016
| 39% | 36% | 17% | 7% | 1% |

2015
| 9% | 20% | 27% | 30% | 8% | 7% |

- 🟧 Social media marketing generates significant ROI
- 🟨 Social media marketing generates some ROI
- 🟦 Social media marketing will eventually generate ROI
- 🟦 Social media marketing indirectly generates ROI
- 🟦 Social media marketing does not generate ROI
- ⬜ Unsure
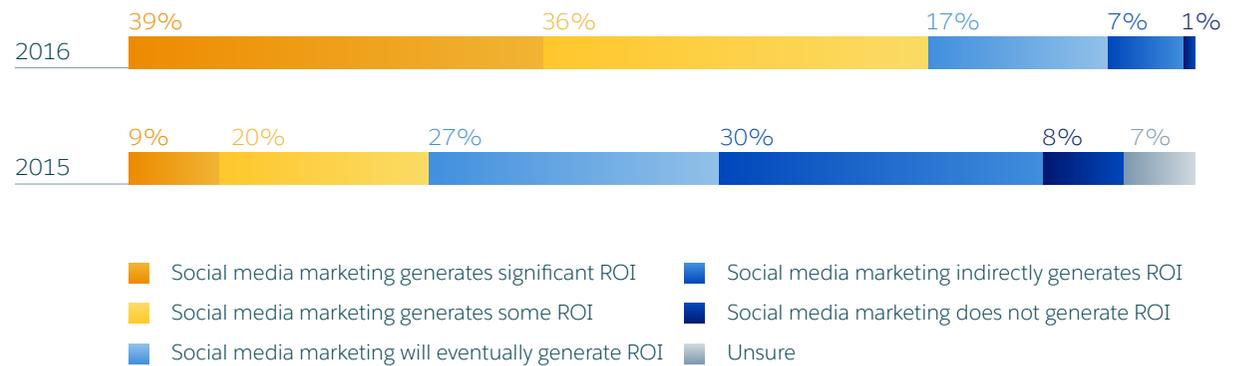
[6] *"Unsure" was not an answer option in the 2016 survey.*

Social provides an open platform for two-way communication between businesses and customers that's hard to replicate elsewhere. Social channels give marketers a forum to build digital rapport on a highly personalized scale – one retweet, like, and comment at a time.

Top marketing teams understand the need for real-time communication and engagement on social channels. The most successful marketers excel at replying in a timely manner across all social networks.

*All data in this section represents respondents who use social as part of their marketing strategy.*

## Top Teams Are Quick to Respond on Social

*High-performing marketers are better at staying on top of social. Top teams are 11x more likely than underperformers to be excellent at responding to social interactions in a timely manner.*

**Percentage Who Excel at Responding to Social Interactions in a Timely Manner**

High performers

Moderate performers

Underperformers

6%

21%

65%

High-performing vs. Underperforming Teams

# 11x

more likely to be excellent at responding to social interactions in a timely manner
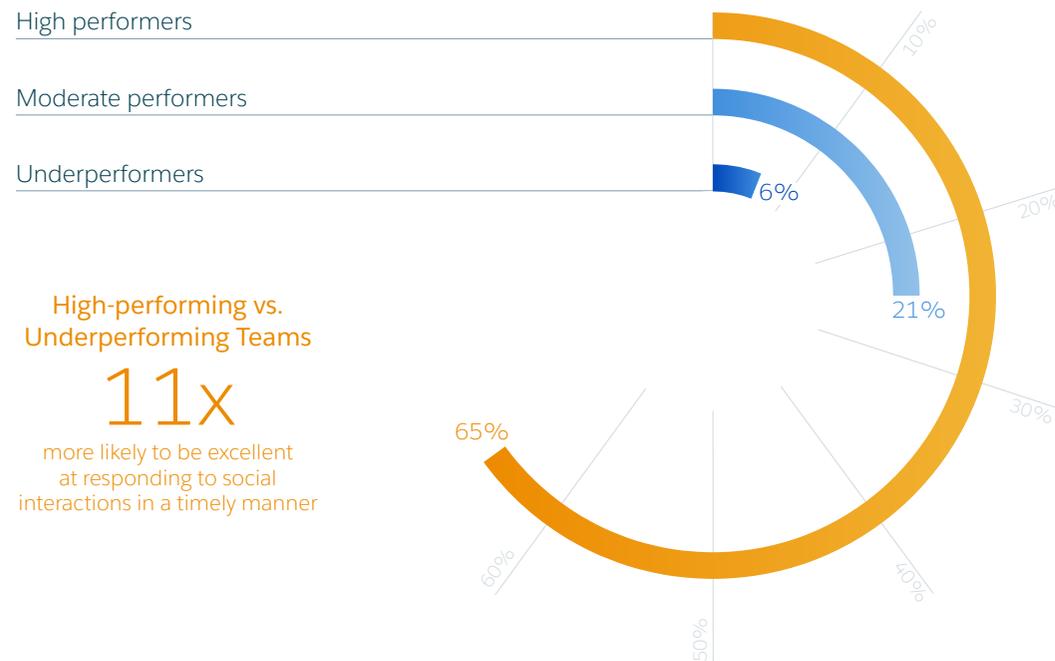
To be truly effective, social media marketing efforts can't live in a silo. Top teams understand this and use social listening to better understand their audiences and the market.

**High performers are 8.6x more likely than underperformers to use social listening tools extensively.**

*All data in this section represents respondents who use social as part of their marketing strategy.*

## Social Listening and Publishing Go Hand in Hand for Top Teams

*A majority of high-performing marketing teams say that social listening and publishing tools are very effective.*
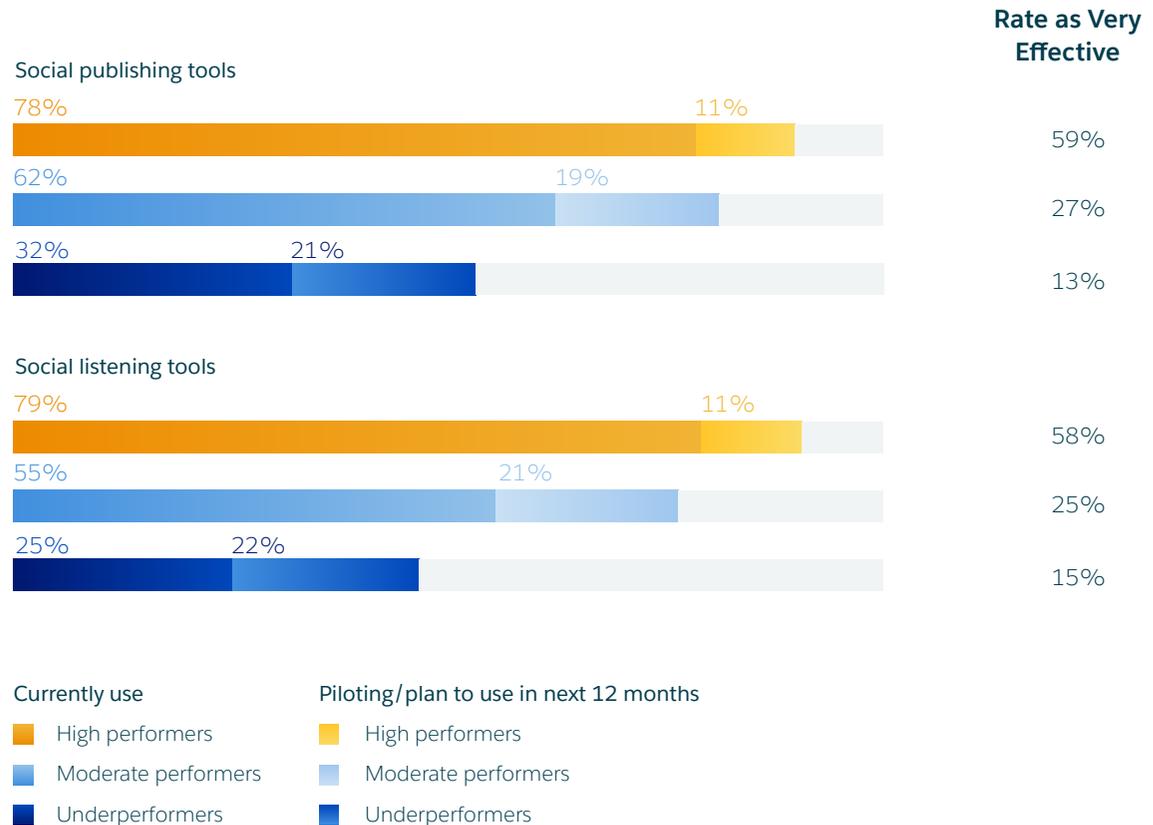
**Rate as Very Effective**

### Social publishing tools

| | | |
|---|---|---|
| 78% | 11% | 59% |
| 62% | 19% | 27% |
| 32% | 21% | 13% |

### Social listening tools

| | | |
|---|---|---|
| 79% | 11% | 58% |
| 55% | 21% | 25% |
| 25% | 22% | 15% |

**Currently use**
- High performers
- Moderate performers
- Underperformers

**Piloting / plan to use in next 12 months**
- High performers
- Moderate performers
- Underperformers

# 08 Key Insights by Marketing Channel
## Social Sees Massive ROI Growth

Top teams are also 1.7x more likely than underperformers to align their social media marketing strategy with other social activities such as customer service. This alignment is critical to delivering a seamless customer experience, and exhibits the cross-company mindset that's more common among high performers.

*All data in this section represents respondents who use social as part of their marketing strategy.*

## Social Marketing Meets Social Customer Service

*Eighty-four percent of high-performing marketing teams align their social media marketing strategy with other social activities such as customer service.*

**Percentage Who Use Each Social Strategy**

**High-performing vs. Underperforming Teams**

Integrates social media activity into other tools and technology (e.g., CRM)
- 82%
- 67%
- 39%

### 2.1x
more likely to use strategy

Aligns social marketing strategy with other social activities (e.g., customer service)
- 84%
- 73%
- 50%

### 1.7x
more likely to use strategy

■ High performers    ■ Moderate performers    ■ Underperformers

**❝ MARKETING LEADER** *perspective*

**ALEX AND ANI**

*"Listening is the foundation of everything we do. It's about truly engaging with every fan, building relationships, and looking at it as more than just a one-off interaction. We believe that about 75% of our customers touch social at some point in their journey."*

– **Jessica Latimer**, Senior Manager, Social Media and Customer Engagement

## A Closer Look at Content Marketing

Content marketing has become an integral part of the marketing strategy. Other powerhouse channels like email and social are fueled by content in some form. Among marketers who agree content marketing is core to their business, 48% see a direct link to primary revenue.

However, creating engaging content takes advanced planning, deep audience knowledge, and investment in quality production. High performers rate content marketing highly as a revenue-generating tactic but also say creating unique content is a top challenge.

Almost half of high performers are extensively leveraging user-generated content, which requires listening to and engaging with readers on a micro scale. Leading marketing teams also create content more quickly; 80% of high performers publish content at least two to three times per week, compared to 16% of underperformers.

### Content Marketing Is a Primary Business Tool

*More than three-quarters of marketers agree that content marketing is core to their business.*

**77%**
agree content marketing is core to business
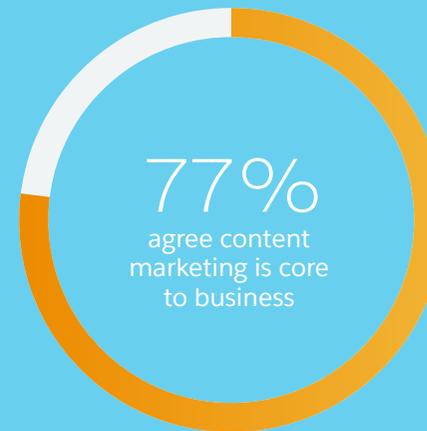
### Top Teams Extensively Leverage User-Generated Content

*In an effort to create engaging experiences, high performers listen closely to their audience and make use of reader-generated content.*

**Percentage Who Extensively Use User-Generated Content**

| | |
|---|---|
| High performers | 47% |
| Moderate performers | 19% |
| Underperformers | 8% |
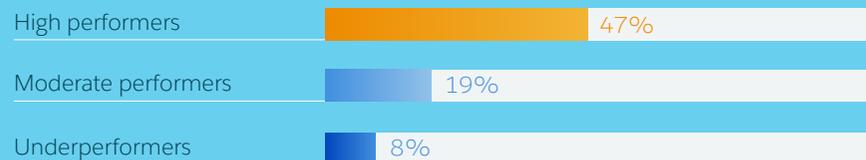
**High-performing vs. Underperforming Teams**

**3.4x**
more likely to say content marketing generates significant ROI

# 09 Key Insights by Marketing Channel
## Advertising Accelerates on Social Platforms

Nearly two-thirds of marketers are boosting budgets for advertising on social platforms in 2016, making it the third largest area for increased investment. **Among high-performing marketing teams, 80% will increase spending on advertising on social platforms.** It's also the most popular digital advertising strategy, with 65% of marketers currently using and another 17% planning to use it this year.

Along with advertising on social platforms, marketers rate video advertising as a very effective digital advertising strategy. High performers are 7.6x more likely than underperformers to extensively use video advertising.

*All data in this section represents respondents who use digital advertising as part of their marketing strategy.*

## More Marketers Advertise on Social Platforms than Other Outlets

*At least two-thirds of marketers agree that these digital advertising strategies are very effective or effective.*

**Digital Advertising Strategies**

| Digital Advertising Strategies | Currently use | Piloting/plan to use in the next 12 months | Rate as Very Effective or Effective |
|---|---|---|---|
| Advertising on social platforms | 65% | 17% | 71% |
| Display or banner ads | 62% | 17% | 66% |
| Video advertising | 54% | 21% | 72% |
| Native advertising | 54% | 18% | 66% |

■ Currently use   ■ Piloting/plan to use in the next 12 months
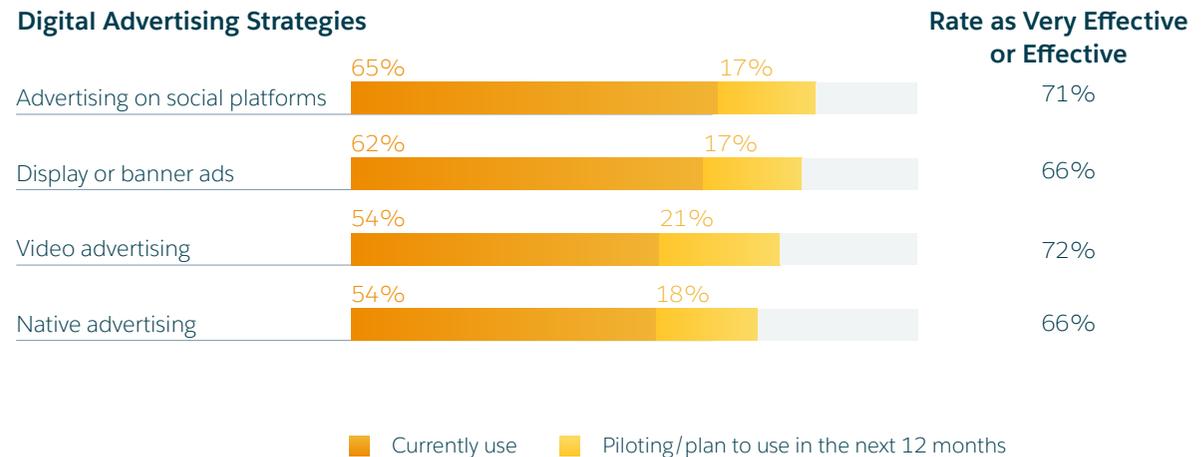
A large majority of marketers using digital advertising use data – customer, demographic, or website activity – to segment or target their advertising.

In order to create a unique experience based on real customer identity, **83% of high performers use customer data (e.g., email or phone data) to segment or target ads, 1.5x more often than underperformers.** 🐦

*All data in this section represents respondents who use digital advertising as part of their marketing strategy.*

### Data-Driven Advertising Takes Center Stage

*Personalization and targeting are key to successful advertising campaigns. Ninety-one percent of marketing leaders now use data to segment their advertising.*

**91%** use data to target or segment advertising

### High Performers Use Customer Data to Target Ads

*Top marketing teams are more likely than underperformers to use a variety of data points to get smarter about how they're segmenting ads.*

| | Underperforming | | High-performing |
|---|---|---|---|
| Use customer data (e.g., email or phone data) to segment or target ads | 57% | 1.5x | 83% |
| Use website activity data (e.g., retargeting cookies) to segment or target ads | 45% | 1.9x | 87% |
| Use demographic data (e.g., age, gender) to segment or target ads | 51% | 1.6x | 83% |

● High-performing teams    ● Underperforming teams
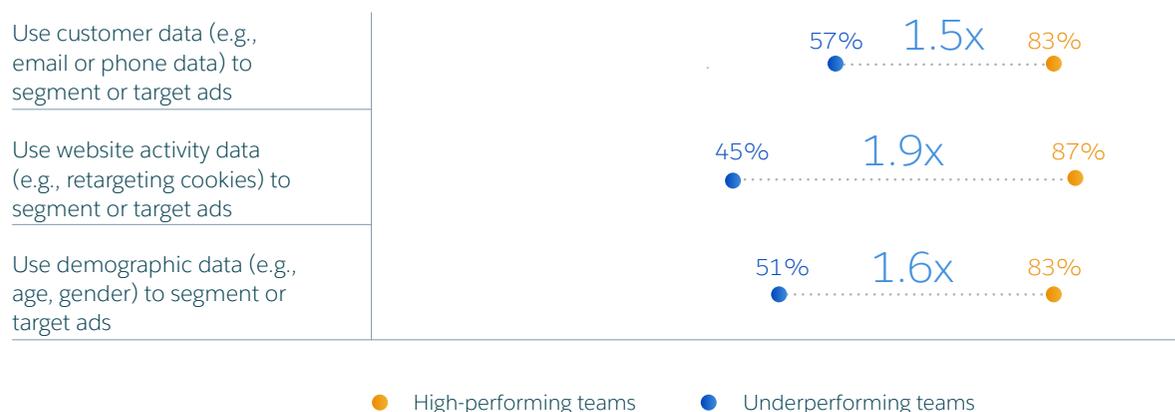
# Last Look
## Keys to Becoming a High-Performing Marketer

**1  Adopt a Customer Journey Strategy**

From supercharging revenue growth to boosting customer satisfaction scores, the benefits of adopting a customer journey strategy are reported readily this year. Top marketing teams are 8.8x more likely than underperformers to strongly agree that they've adopted a customer journey strategy as part of their overall business strategy.

**2  Lead the Customer Experience across Your Business**

Customers want one experience whether they're interacting with marketing, sales, or service. High-performing marketers are breaking down barriers to deliver a unified face of the business. Top teams are 7.7x more likely than underperformers to strongly agree they're leading customer experience initiatives across the business.

**3  Leverage Intelligent Marketing Tech**

As the opportunities for data-driven marketing grow, marketers have a seemingly infinite toolbox for connecting with customers. To keep pace with the dynamic marketing industry and support smarter communications, top teams are 2.8x more likely to substantially increase spending on tools and tech – from marketing automation to predictive intelligence.

**4  Go Mobile: Be as Cross-Channel as Your Customers**

With even more marketers reporting significant ROI for mobile, email, and social this year, it's crucial to orchestrate these channels in support of a seamless customer experience. Social selling and mobile opt-in, for example, rank in the top five most effective email campaign types.

**5  Target Ads with Customer Data**

In the age of the customer, one-to-many communications fall flat. Striving to create a unique experience based on real customer identity, 83% of high performers use customer data (e.g., email or phone data) to segment or target ads.

# Country Profiles

# Country Profile
## United States (1,285 marketing leaders)

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### Top of Mind for Marketing Leaders

#### Top Marketing Success Measures

**37%** Revenue growth

**28%** Customer satisfaction

**26%** Return on investment

#### Top Marketing Priorities

**39%** Brand awareness

**38%** Higher levels of customer engagement

**28%** Social media engagement

#### Top Marketing Challenges

**30%** Budget constraints

**27%** Quality of leads

**25%** Customer acquisition

---

### Managing the Customer Journey

**68%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**68%** of all marketing leaders are actively mapping the customer journey

#### Customer Journey Adoption Drives Powerful, Positive Results

80% agree it positively impacts overall customer engagement

75% agree it positively impacts customers' willingness to recommend products and services

75% agree it positively impacts revenue growth

69% agree it positively impacts customer satisfaction (CSAT) scores

68% agree it positively impacts customer churn rates

---

### Creating a Shared Customer Experience

68% of all marketing leaders say they are leading customer experience initiatives across the business

55% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

---

### Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**68%** Social media marketing

**68%** Social media engagement

**66%** Mobile applications

---

### Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**49%** Predictive intelligence

**38%** Guided selling

**37%** Marketing automation

---

Salesforce Research

# Country Profile
## Canada (421 marketing leaders)

## Top of Mind for Marketing Leaders

### Top Marketing Success Measures

**35%** Revenue growth

**34%** Customer satisfaction

**23%** Customer retention rates

### Top Marketing Priorities

**36%** Brand awareness

**31%** Higher levels of customer engagement

**29%** Social media engagement

### Top Marketing Challenges

**30%** Budget constraints

**24%** New business development

**23%** Staying ahead of social media trends

## Managing the Customer Journey

**68%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**67%** of all marketing leaders are actively mapping the customer journey

### Customer Journey Adoption Drives Powerful, Positive Results

75% agree it positively impacts customers' willingness to recommend products and services

74% agree it positively impacts overall customer engagement

73% agree it positively impacts revenue growth

73% agree it positively impacts customer satisfaction (CSAT) scores

70% agree it positively impacts customer churn rates

## Creating a Shared Customer Experience

65% of all marketing leaders say they are leading customer experience initiatives across the business

56% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

## Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**64%** Social media marketing

**62%** Advertising on social platforms

**62%** Social media engagement

## Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**41%** Collaboration tools

**40%** Guided selling

**39%** Marketing automation

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# Country Profile
## Brazil (353 marketing leaders)

## Top of Mind for Marketing Leaders

### Top Marketing Success Measures

**47%** Customer satisfaction

**31%** Return on investment

**27%** Revenue growth

### Top Marketing Priorities

**33%** Higher levels of customer engagement

**32%** Brand awareness

**29%** Social media engagement

### Top Marketing Challenges

**29%** Producing unique, original content

**27%** Talent acquisition

**27%** New business development

## Managing the Customer Journey

**91%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**88%** of all marketing leaders are actively mapping the customer journey

### Customer Journey Adoption Drives Powerful, Positive Results

90% agree it positively impacts customers' willingness to recommend products and services

90% agree it positively impacts revenue growth

89% agree it positively impacts overall customer engagement

88% agree it positively impacts customer churn rates

88% agree it positively impacts customer satisfaction (CSAT) scores

## Creating a Shared Customer Experience

87% of all marketing leaders say they are leading customer experience initiatives across the business

77% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

## Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**86%** Social media marketing

**86%** Advertising on social platforms

**86%** Social media engagement

## Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**23%** Lead nurturing and scoring

**18%** Predictive intelligence

**17%** Enterprise resource planning software

Salesforce Research
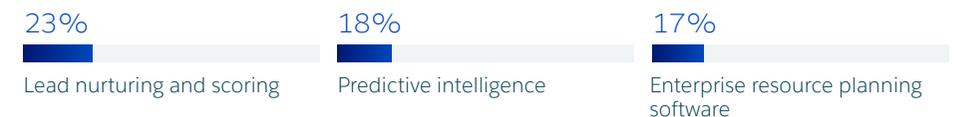
# Country Profile
## United Kingdom (428 marketing leaders)

### Top of Mind for Marketing Leaders

#### Top Marketing Success Measures
- 29% Revenue growth
- 23% Customer satisfaction
- 21% Lifetime customer value

#### Top Marketing Priorities
- 36% Brand awareness
- 31% Higher levels of customer engagement
- 27% Social media engagement

#### Top Marketing Challenges
- 25% Budget constraints
- 25% Quality of leads
- 23% Keeping pace with customers

### Managing the Customer Journey

**70%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**68%** of all marketing leaders are actively mapping the customer journey

**Customer Journey Adoption Drives Powerful, Positive Results**

77% agree it positively impacts overall customer engagement

73% agree it positively impacts revenue growth

72% agree it positively impacts customers' willingness to recommend products and services

69% agree it positively impacts customer churn rates

68% agree it positively impacts customer satisfaction (CSAT) scores

### Creating a Shared Customer Experience

68% of all marketing leaders say they are leading customer experience initiatives across the business

60% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

### Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

- 63% Social media engagement
- 63% Social media marketing
- 62% Advertising on social platforms

### Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

- 45% Predictive intelligence
- 41% Marketing automation
- 39% Social listening tools

# Country Profile
## France (298 marketing leaders)

## Top of Mind for Marketing Leaders

### Top Marketing Success Measures

**44%** Customer satisfaction

**35%** Customer retention rates

**26%** Revenue growth

### Top Marketing Priorities

**36%** Brand awareness

**27%** Content optimization

**26%** Higher levels of customer engagement

### Top Marketing Challenges

**29%** Budget constraints

**26%** Building deeper customer relationships

**23%** Customer acquisition

## Managing the Customer Journey

**73%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**71%** of all marketing leaders are actively mapping the customer journey

### Customer Journey Adoption Drives Powerful, Positive Results

74% agree it positively impacts overall customer engagement

73% agree it positively impacts customers' willingness to recommend products and services

69% agree it positively impacts revenue growth

67% agree it positively impacts customer satisfaction (CSAT) scores

64% agree it positively impacts customer churn rates

## Creating a Shared Customer Experience

70% of all marketing leaders say they are leading customer experience initiatives across the business

57% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

## Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

62% Social media engagement

61% Web personalization

59% Social media marketing

## Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

37% Predictive intelligence

37% Guided selling

36% Enterprise resource planning software

Salesforce Research

## Germany (400 marketing leaders)

### Top of Mind for Marketing Leaders

#### Top Marketing Success Measures

**43%** Customer satisfaction

**41%** Revenue growth

**36%** Customer acquisition

#### Top Marketing Priorities

**32%** Higher levels of customer engagement

**28%** Brand awareness

**25%** Content optimization

#### Top Marketing Challenges

**30%** Customer acquisition

**26%** Building deeper customer relationships

**25%** New business development

### Managing the Customer Journey

**65%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**59%** of all marketing leaders are actively mapping the customer journey

**Customer Journey Adoption Drives Powerful, Positive Results**

66% agree it positively impacts overall customer engagement

66% agree it positively impacts revenue growth

65% agree it positively impacts customer satisfaction (CSAT) scores

64% agree it positively impacts customers' willingness to recommend products and services

58% agree it positively impacts customer churn rates

### Creating a Shared Customer Experience

65% of all marketing leaders say they are leading customer experience initiatives across the business

55% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

### Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**64%** Advertising on social platforms

**64%** Social media marketing

**63%** Videos

### Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**42%** Marketing automation

**37%** Predictive intelligence

**35%** Data targeting and segmentation

Salesforce Research

# Country Profile
## Australia (326 marketing leaders)

## Top of Mind for Marketing Leaders

### Top Marketing Success Measures

**33%** Revenue growth

**29%** Customer satisfaction

**26%** Return on investment

### Top Marketing Priorities

**37%** Brand awareness

**34%** Higher levels of customer engagement

**26%** Social media engagement

### Top Marketing Challenges

**25%** Budget constraints

**23%** Analyzing data to make better business decisions

**22%** Building deeper customer relationships

## Managing the Customer Journey

**63%** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

**62%** of all marketing leaders are actively mapping the customer journey

### Customer Journey Adoption Drives Powerful, Positive Results

72% agree it positively impacts overall customer engagement

69% agree it positively impacts customers' willingness to recommend products and services

68% agree it positively impacts revenue growth

68% agree it positively impacts customer satisfaction (CSAT) scores

65% agree it positively impacts customer churn rates

## Creating a Shared Customer Experience

63% of all marketing leaders say they are leading customer experience initiatives across the business

50% of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent or above average

## Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**65%** Social media engagement

**64%** Advertising on social platforms

**64%** Social media marketing

## Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**47%** Predictive intelligence

**47%** Marketing automation

**47%** Offer management

# Country Profile
## Japan (400 marketing leaders)

## Top of Mind for Marketing Leaders

### Top Marketing Success Measures

**49%** Customer satisfaction

**30%** Customer acquisition

**30%** Customer retention rates

### Top Marketing Priorities

**43%** Brand awareness

**33%** Higher levels of customer engagement

**32%** Channel expansion

### Top Marketing Challenges

**30%** Building deeper customer relationships

**30%** Talent acquisition

**24%** New business development

## Managing the Customer Journey

**1/4** of all marketing leaders have adopted a customer journey strategy as part of their overall business strategy

## Cross-Channel Integration

**60%** of all marketing leaders have integrated social media marketing strategy into their overall marketing strategy

**55%** of all marketing leaders have integrated mobile marketing strategy into their overall marketing strategy

**47%** of all marketing leaders have integrated email marketing strategy into their overall marketing strategy

## The Importance of Predictive Intelligence

**55%** of all marketing leaders view predictive intelligence or data science as an important part of their overall marketing strategy

## Creating a Shared Customer Experience

**67%** of all marketing leaders rate their ability to collaborate with other business units as excellent, above average, or average

**62%** of all marketing leaders rate their ability to create personalized omni-channel customer experiences across all business units as excellent, above average, or average

## Top Areas for Increased Digital Spending

*Percentage Who Are Increasing Spending in Each Area over the Next 12 Months*

**56%** Mobile applications

**54%** Wearables

**54%** Video advertising

## Anticipated Growth of Tools and Tech

*Percentage Growth for Each Tool or Technology over the Next 12 Months*

**57%** Marketing automation

**52%** Social listening tools

**49%** Social publishing tools

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# Appendices

# Appendix A
## Introduction: Priorities, Challenges, and Budgets

**Customer engagement is a top priority for high performers.** *Here we see the three primary marketing priorities divided by performance level. Across the board, teams strive for higher levels of customer engagement.*

### High-Performing Teams
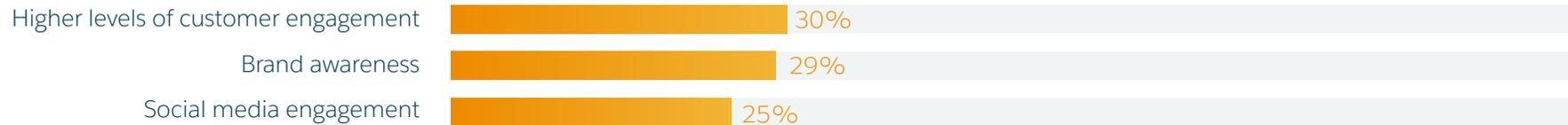
| | |
|---|---|
| Higher levels of customer engagement | 30% |
| Brand awareness | 29% |
| Social media engagement | 25% |

### Moderate-Performing Teams

| | |
|---|---|
| Brand awareness | 37% |
| Higher levels of customer engagement | 34% |
| Social media engagement | 26% |

### Underperforming Teams

| | |
|---|---|
| Brand awareness | 45% |
| Higher levels of customer engagement | 37% |
| Subscriber acquisition and content optimization | 22% |
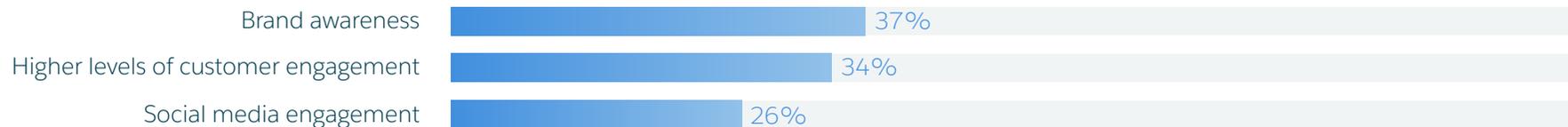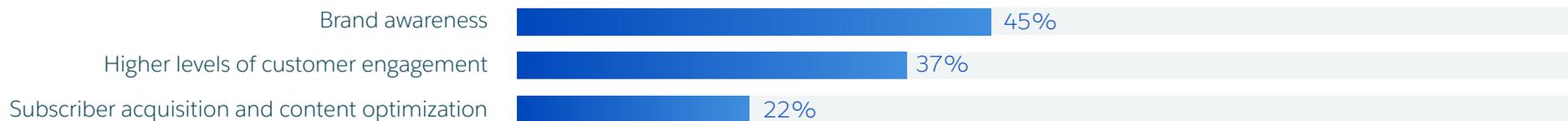
# Top Marketing Teams Win with a Customer Journey Strategy

**For those who haven't adopted a customer journey strategy, the biggest roadblocks include budget, lack of internal resources, and an absence of corporate support.** *Just as top performers have buy-in from their executive teams and marketing-prioritized budgets, lack of these two support pillars shows the struggle to create a customer journey. Here we see the top reasons why companies have not adopted a customer journey strategy, divided by performance level.*

### High-Performing Teams
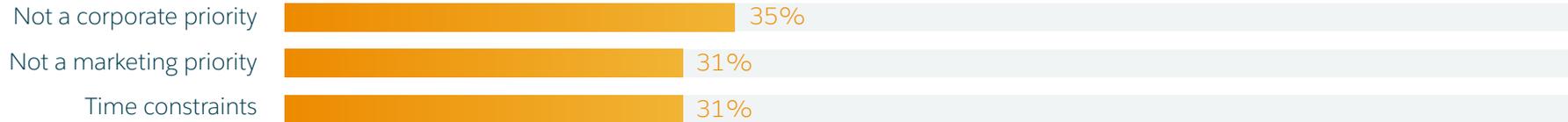
| | |
|---|---|
| Not a corporate priority | 35% |
| Not a marketing priority | 31% |
| Time constraints | 31% |

### Moderate-Performing Teams

| | |
|---|---|
| Budgetary constraints | 35% |
| Not a corporate priority | 34% |
| Not enough internal resources | 34% |

### Underperforming Teams

| | |
|---|---|
| Not enough internal resources | 47% |
| Budgetary constraints | 47% |
| Not a corporate priority | 34% |
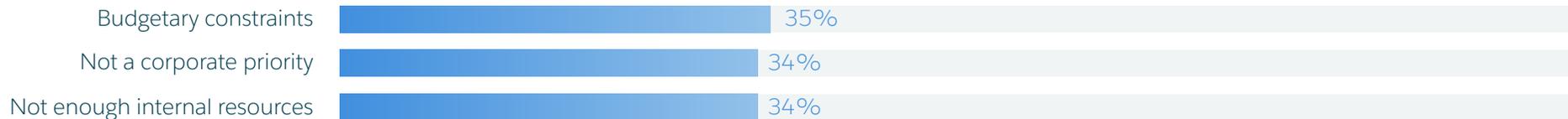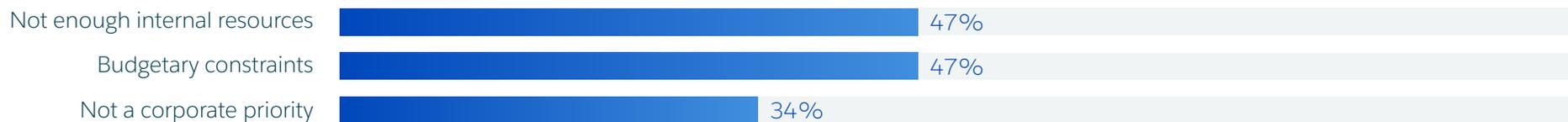
# Appendix B
## Top Marketing Teams Win with a Customer Journey Strategy

**To be successful, marketing leaders must view marketing as a primary product they create.** *Here we see how marketing leaders rate their business performance versus their direct competitors, divided by performance level.*

High performers

Moderate performers

Underperformers

8%

1%

71%
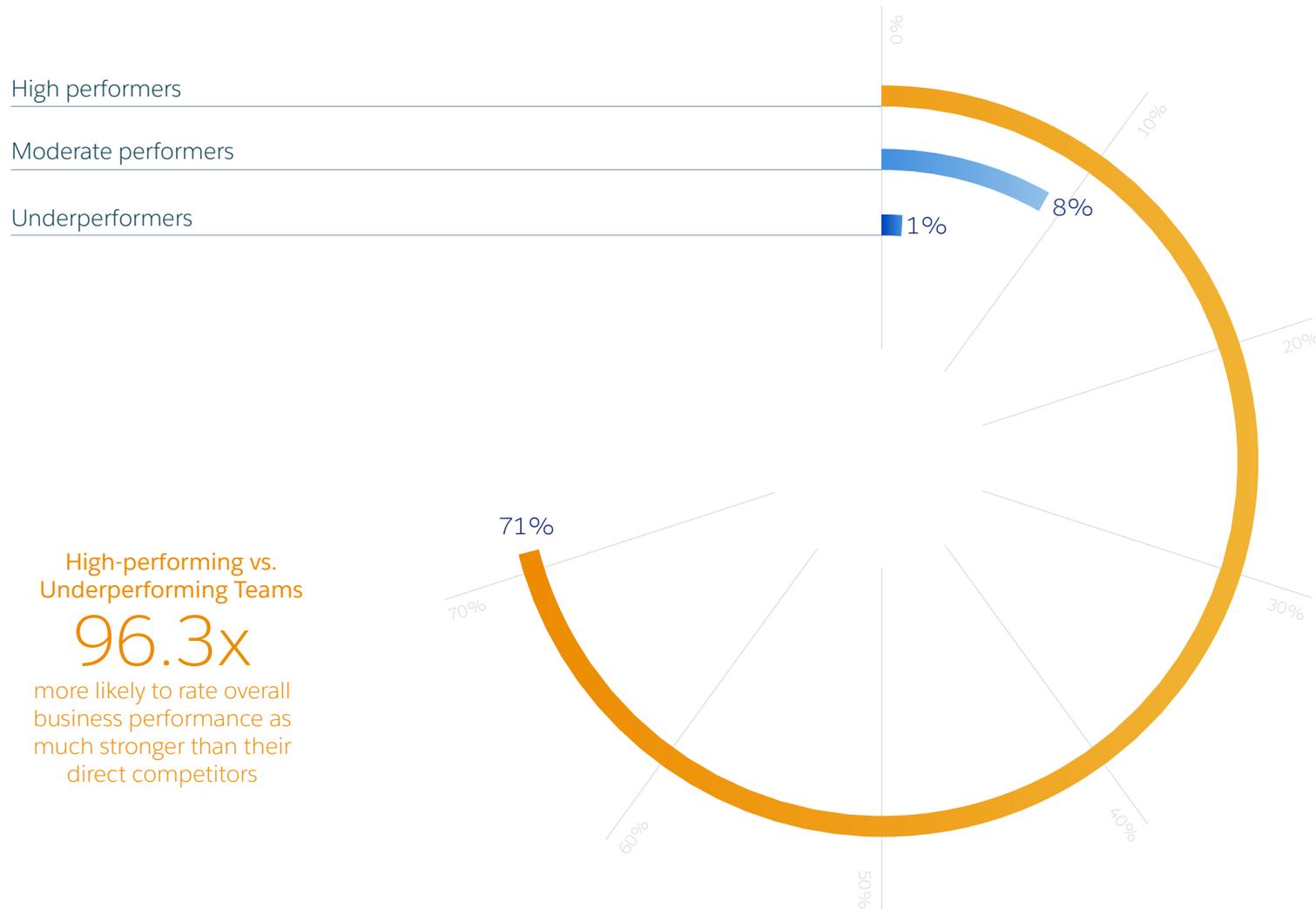
### High-performing vs. Underperforming Teams

# 96.3x

more likely to rate overall business performance as much stronger than their direct competitors

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# Top Marketing Teams Are Integrating the Customer Experience

**Top marketers are 16.4x more likely to excel at creating a single customer view.** *Here we see the percentage of marketing leaders who are excellent at creating a single view of the customer, divided by performance level.*

High performers

Moderate performers

Underperformers

0%

10%

4%

18%

20%

30%

40%

50%

60%

64%
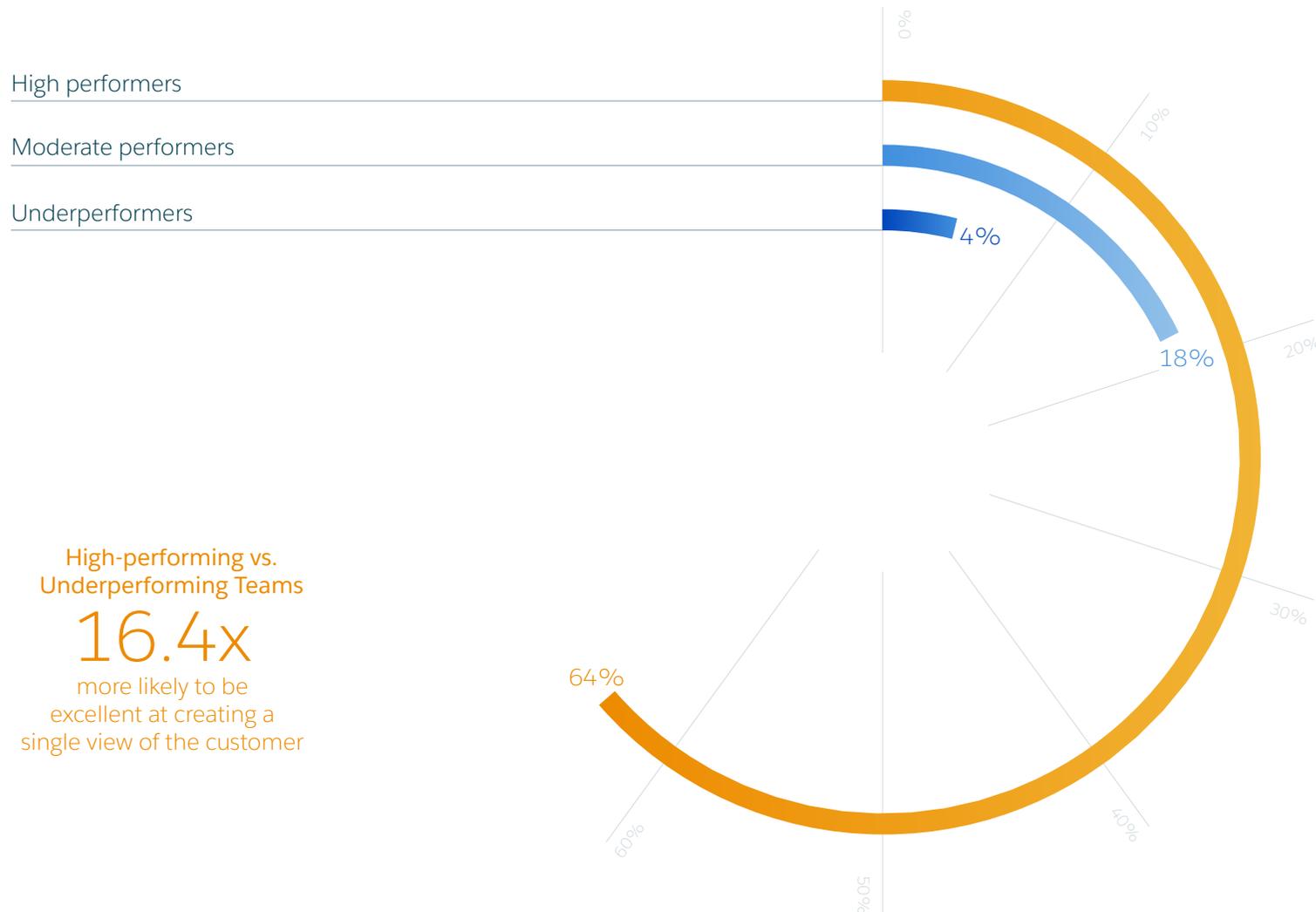
**High-performing vs. Underperforming Teams**

# 16.4x

more likely to be excellent at creating a single view of the customer

## Top Marketing Teams Get Smart with Tech Adoption

**On average, high performers use 2.5x more tools and technologies than underperformers.** *Here we see the average number of tools and technologies used, divided by performance level.*



X axis: Number of Technologies Being Used
Y axis: Probability

$\bar{x} = 5.10$   s = 4.81

$\bar{x} = 9.48$   s = 5.04

$\bar{x} = 12.78$   s = 4.36

High-Performing Teams          Moderate-Performing Teams          Underperforming Teams
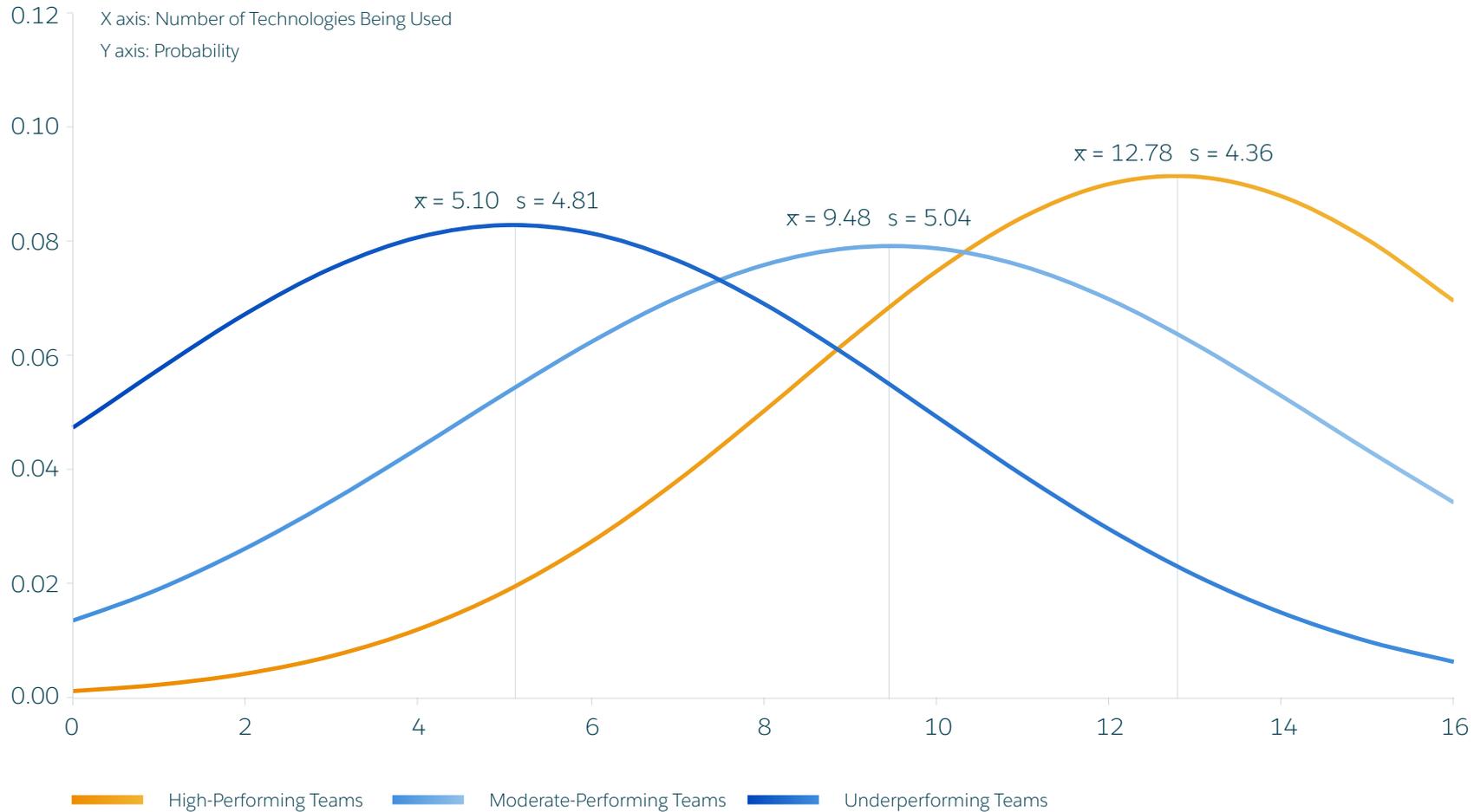
# Appendix E
## Real-Time Channel Orchestration Strikes a Chord

**Top marketers are 1.5x more likely to say they consider advertising on social platforms to be part of mobile marketing.** *Here we see the percentage who consider advertising on social platforms to be part of mobile marketing, divided by performance level.*

High performers

Moderate performers
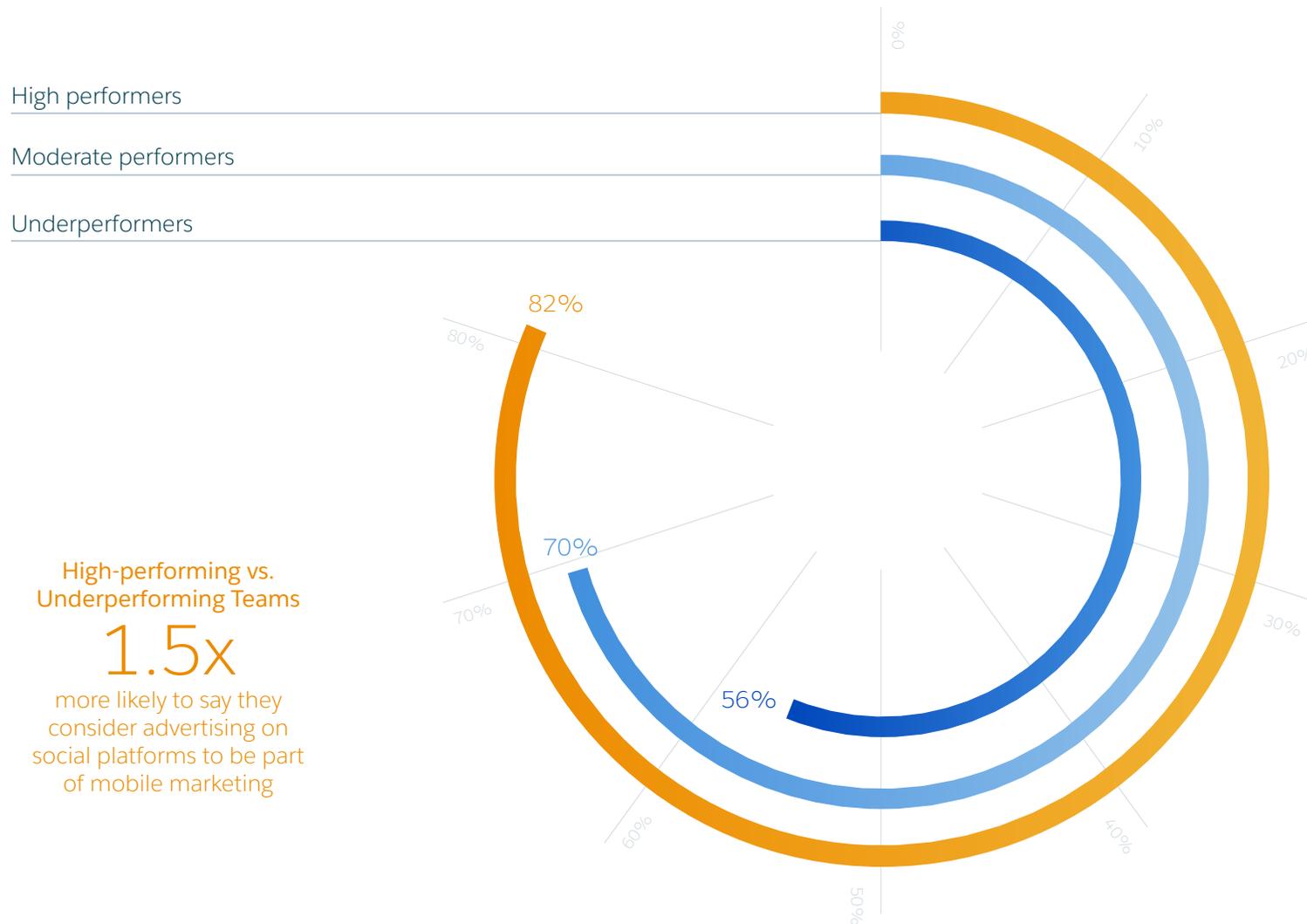
Underperformers

**High-performing vs. Underperforming Teams**

# 1.5x

more likely to say they consider advertising on social platforms to be part of mobile marketing

82%

70%

56%

0%

10%

20%

30%

40%

50%

60%

70%

80%

# Mobile Momentum Hits a Tipping Point

**Seventy-nine percent of marketing leaders agree that mobile marketing is core to their business.** *Here we see the percentage that view mobile marketing as core to their business and the reasons why.*

## 79%
agree that mobile marketing is core to their business

**2016**
| 50% | 42% | 8% |

**2015**
| 16% | 70% | 15% |

**2014**
| 14% | 57% | 29% |

■ Mobile marketing is directly linked to our business' primary revenue source
■ Mobile marketing is a critical enabler of our products and services
■ Mobile marketing indirectly impacts our business performance
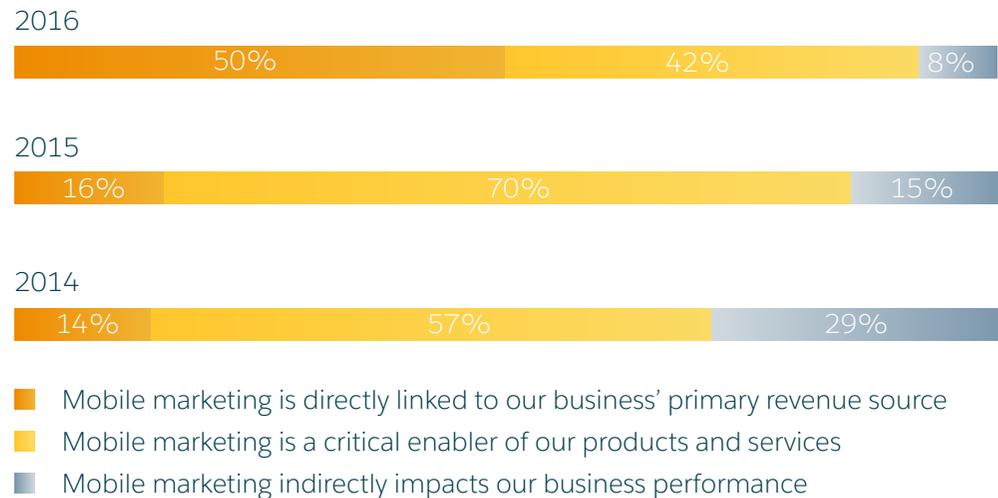
**As Windows OS is gaining marketshare, marketing leaders are pivoting to support mobile apps on this operating system.**

*Here we see the percentage of marketing leaders supporting each operating system by year.*
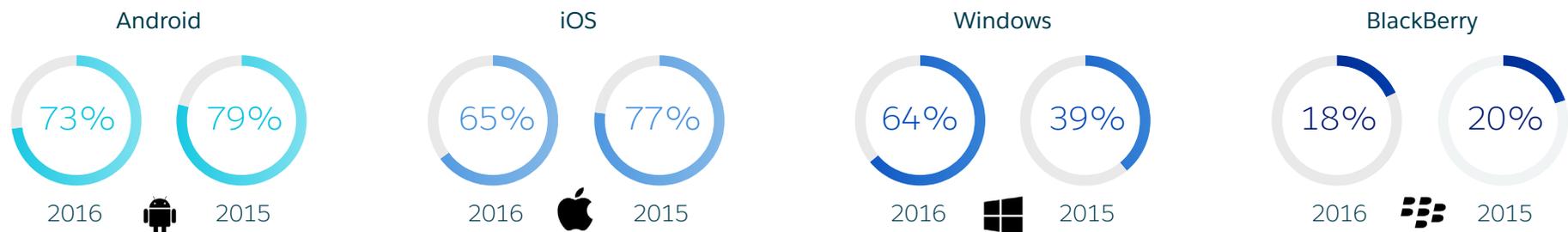
### Android
73% — 2016
79% — 2015

### iOS
65% — 2016
77% — 2015

### Windows
64% — 2016
39% — 2015

### BlackBerry
18% — 2016
20% — 2015

All data in this section represents respondents who use mobile as part of their marketing strategy.

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# Mobile Momentum Hits a Tipping Point

**Popularity doesn't necessarily translate to impact for mobile campaigns.** *Here we see the percentage of marketers who rate each mobile campaign type as effective or very effective, sorted by those most commonly used.*

### Percentage Rating Each Mobile Campaign Type as Very Effective or Effective

| Campaign Type | Percentage |
|---|---|
| Multimedia messages (MMS) | 59% |
| App-based mobile ads | 61% |
| Mobile ads | 62% |
| Mobile opt-in | 70% |
| Video ads | 72% |
| Promotional content | 75% |
| Exclusive deals | 80% |
| Loyalty | 78% |
| Event or invitation | 73% |
| Welcome series | 73% |
| Birthdays | 72% |
| Location-based campaigns | 74% |
| Customer-onboarding journeys | 72% |
| Holiday | 74% |
| Win back | 73% |
| Cross-sell recommendations | 70% |
| Account-based marketing | 71% |
| Post-purchase onboarding | 75% |
| Post-purchase | 75% |
| Transactional | 73% |
| Anniversary | 71% |
| Employee-onboarding journeys | 72% |
| Web opt-in | 72% |
| Re-engagement | 71% |
| Browse retargeting | 75% |
| Social opt-in | 72% |
| Abandoned cart | 72% |
| Educational | 73% |
| Partner-onboarding journeys | 74% |
| Lead scoring | 72% |
| Lead nurturing | 70% |
| Social selling | 73% |
| Press releases | 70% |
| Newsletter | 73% |
| Email opt-in | 71% |
| Email subscription | 70% |

All data in this section represents respondents who use mobile as part of their marketing strategy.

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# Intelligent Email Is Driving Higher Revenue

**Eighty percent of marketing leaders agree that email marketing is core to their business.** *Here we see the percentage who agree email marketing is core to their business and the reasons why.*

## 80%
agree that email marketing
is core to their business

**2016**

| 49% | 43% | 9% |

**2015**

| 20% | 60% | 20% |

**2014**

| 16% | 42% | 42% |

- ■ Email marketing is directly linked to our business' primary revenue source
- ■ Email marketing is a critical enabler of our products and services
- ■ Email marketing indirectly impacts our business performance
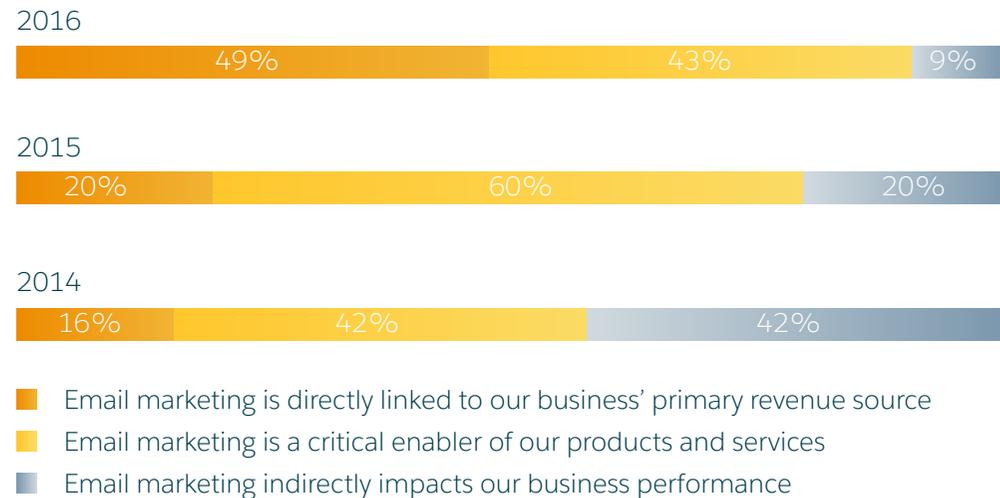
**Top marketing teams send more frequent emails.** *Here we see how often marketers send emails to the same segment, divided by performance level.*
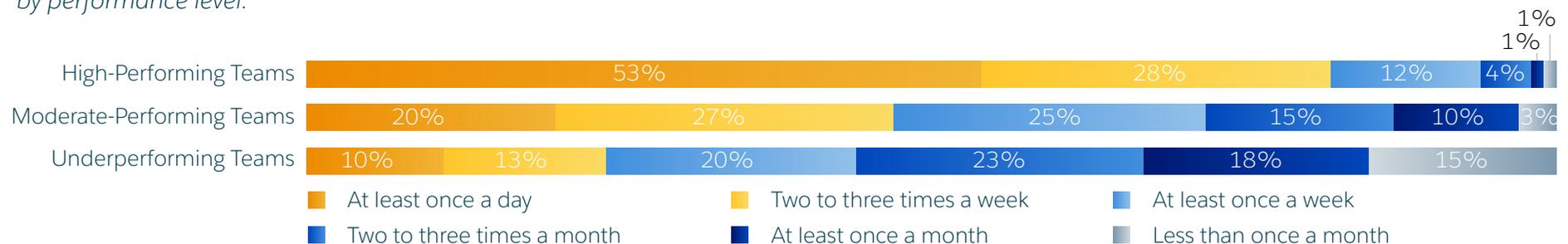
1%
1%

High-Performing Teams | 53% | 28% | 12% | 4% |

Moderate-Performing Teams | 20% | 27% | 25% | 15% | 10% | 3% |

Underperforming Teams | 10% | 13% | 20% | 23% | 18% | 15% |

- ■ At least once a day
- ■ Two to three times a week
- ■ At least once a week
- ■ Two to three times a month
- ■ At least once a month
- ■ Less than once a month

All data in this section represents respondents who use email as part of their marketing strategy.

Salesforce Research

# Intelligent Email Is Driving Higher Revenue

**The most commonly used email campaigns aren't always the most effective.** *Here we see the percentage of marketers who rate each email campaign type as effective or very effective, sorted by those most commonly used.*

| | Percentage Rating Each Email Campaign Type as Very Effective or Effective | Percentage Currently Using |
|---|---|---|
| Newsletter | 69% | 64% |
| Email subscription | 71% | 63% |
| Email opt-in | 69% | 63% |
| Event or invitation | 75% | 59% |
| Re-engagement | 71% | 57% |
| Exclusive deals | 78% | 56% |
| Post-purchase | 72% | 56% |
| Promotional content | 77% | 55% |
| Press releases | 65% | 55% |
| Loyalty | 79% | 54% |
| Transactional | 73% | 54% |
| Welcome series | 75% | 53% |
| Anniversary | 72% | 53% |
| Post-purchase onboarding | 73% | 53% |
| Customer-onboarding journeys | 74% | 53% |
| Lead nurturing | 72% | 53% |
| Account-based marketing | 73% | 53% |
| Win back | 73% | 53% |
| Educational | 73% | 53% |
| Web opt-in | 71% | 52% |
| Birthdays | 73% | 51% |
| Lead scoring | 73% | 51% |
| Holiday | 72% | 51% |
| Cross-sell recommendations | 72% | 51% |
| Employee-onboarding journeys | 74% | 50% |
| Partner-onboarding journeys | 75% | 49% |
| Abandoned cart | 71% | 47% |
| Location-based campaigns | 73% | 47% |
| Browse retargeting | 75% | 46% |
| Social selling | 77% | 40% |
| Video ads | 75% | 40% |
| Social opt-in | 74% | 40% |
| Mobile opt-in | 76% | 39% |

All data in this section represents respondents who use email as part of their marketing strategy.

**Eighty-two percent of marketing leaders agree that social media marketing is core to their business.** *Here we see the percentage who agree social media marketing is core to their business and the reasons why.*

82%

agree that social media marketing is core to their business

2016
| 48% | 41% | 11% |

2015
| 16% | 64% | 19% |

2014
| 9% | 25% | 66% |

■ Social media marketing is directly linked to our business' primary revenue source
■ Social media marketing is a critical enabler of our products and services
■ Social media marketing indirectly impacts our business performance
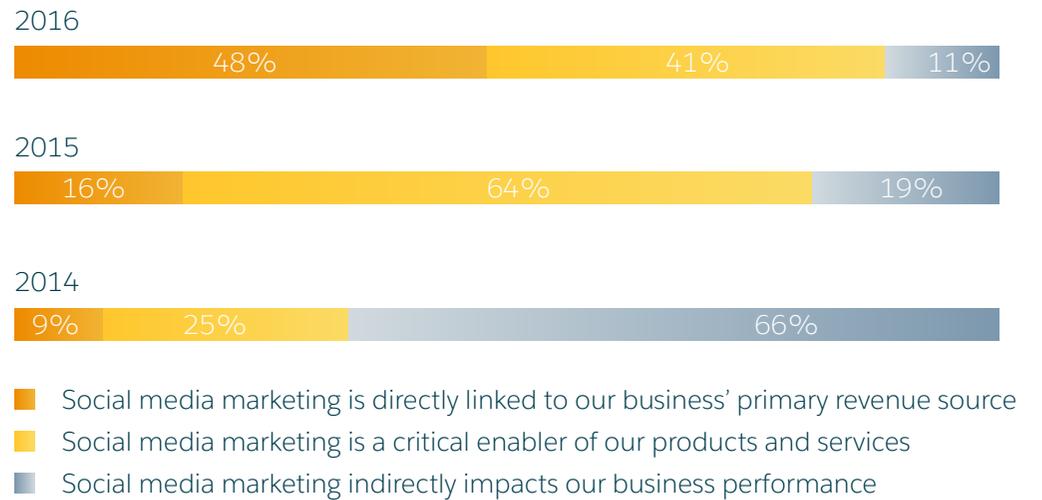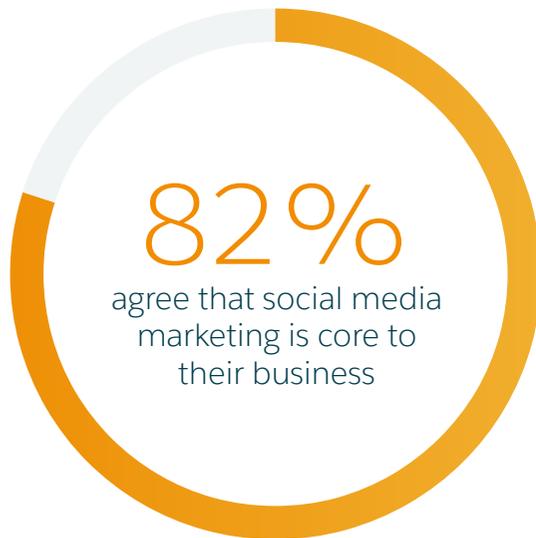
**Top marketing teams are posting more frequently to social channels.** *Here we see how often marketers post to social channels to the same segment, divided by performance level.*
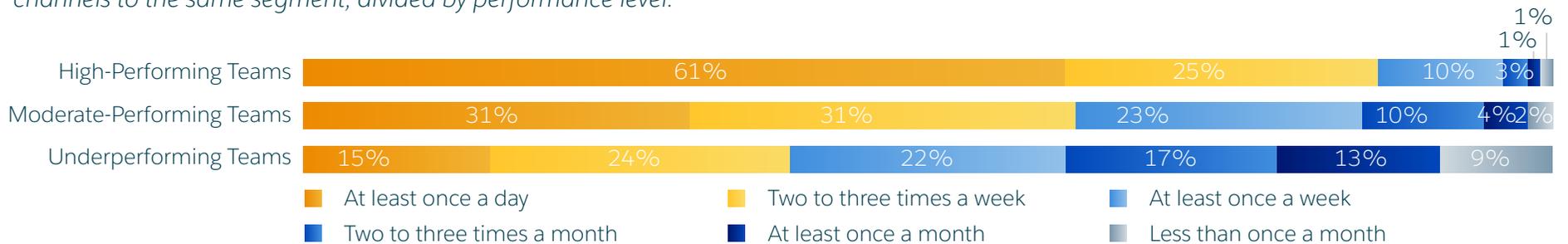
1%
1%

High-Performing Teams       | 61% | 25% | 10% | 3% |
Moderate-Performing Teams   | 31% | 31% | 23% | 10% | 4% | 2% |
Underperforming Teams       | 15% | 24% | 22% | 17% | 13% | 9% |

■ At least once a day          ■ Two to three times a week   ■ At least once a week
■ Two to three times a month   ■ At least once a month       ■ Less than once a month

All data in this section represents respondents who use social as part of their marketing strategy.

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# Appendix H
## Social Sees Massive ROI Growth

**High-performing marketers are more likely to rate social network giants Facebook and Twitter as effective channels.** *Here we see the percentage who rate each social media channel as very effective or effective, divided by performance level.*
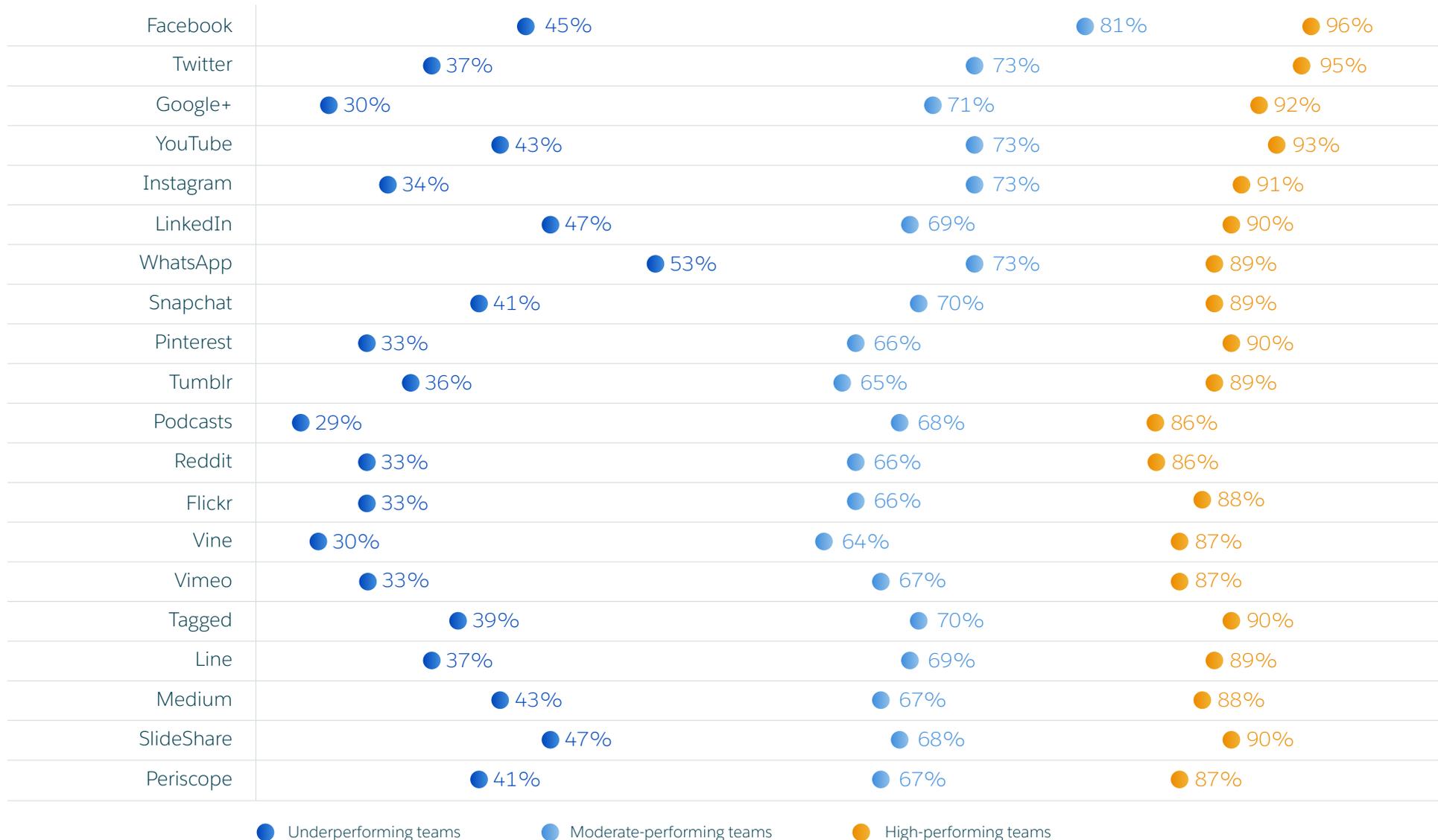
| Channel | Underperforming teams | Moderate-performing teams | High-performing teams |
|---|---|---|---|
| Facebook | 45% | 81% | 96% |
| Twitter | 37% | 73% | 95% |
| Google+ | 30% | 71% | 92% |
| YouTube | 43% | 73% | 93% |
| Instagram | 34% | 73% | 91% |
| LinkedIn | 47% | 69% | 90% |
| WhatsApp | 53% | 73% | 89% |
| Snapchat | 41% | 70% | 89% |
| Pinterest | 33% | 66% | 90% |
| Tumblr | 36% | 65% | 89% |
| Podcasts | 29% | 68% | 86% |
| Reddit | 33% | 66% | 86% |
| Flickr | 33% | 66% | 88% |
| Vine | 30% | 64% | 87% |
| Vimeo | 33% | 67% | 87% |
| Tagged | 39% | 70% | 90% |
| Line | 37% | 69% | 89% |
| Medium | 43% | 67% | 88% |
| SlideShare | 47% | 68% | 90% |
| Periscope | 41% | 67% | 87% |

● Underperforming teams     ● Moderate-performing teams     ● High-performing teams

All data in this section represents respondents who use social as part of their marketing strategy.

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## Advertising Accelerates on Social Platforms

**A majority of marketing leaders are increasing ad spending.** *Here we see the percentage who plan to increase spending across digital advertising channels.*

| Channel | Percentage |
|---|---|
| Advertising on social platforms | 65% |
| Social platform video advertising | 63% |
| Video advertising | 62% |
| Display or banner ads | 58% |
| Native advertising | 54% |
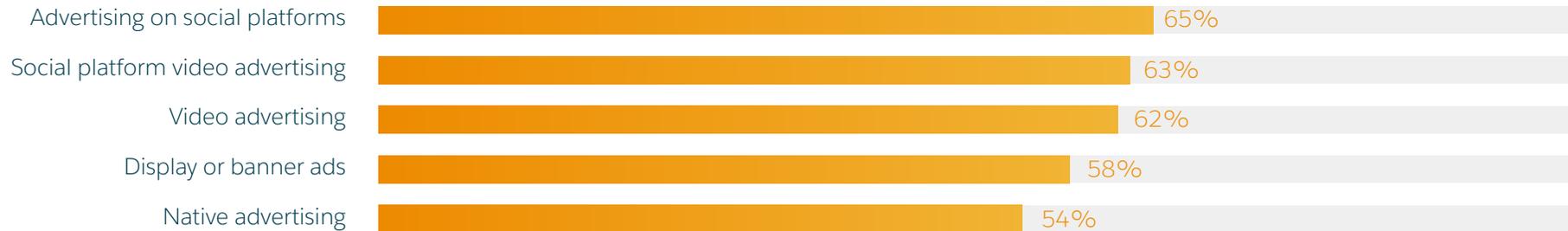
**A large majority of marketers use data to segment or target advertising.** *Here we see the types of data marketers use to segment digital ads.*
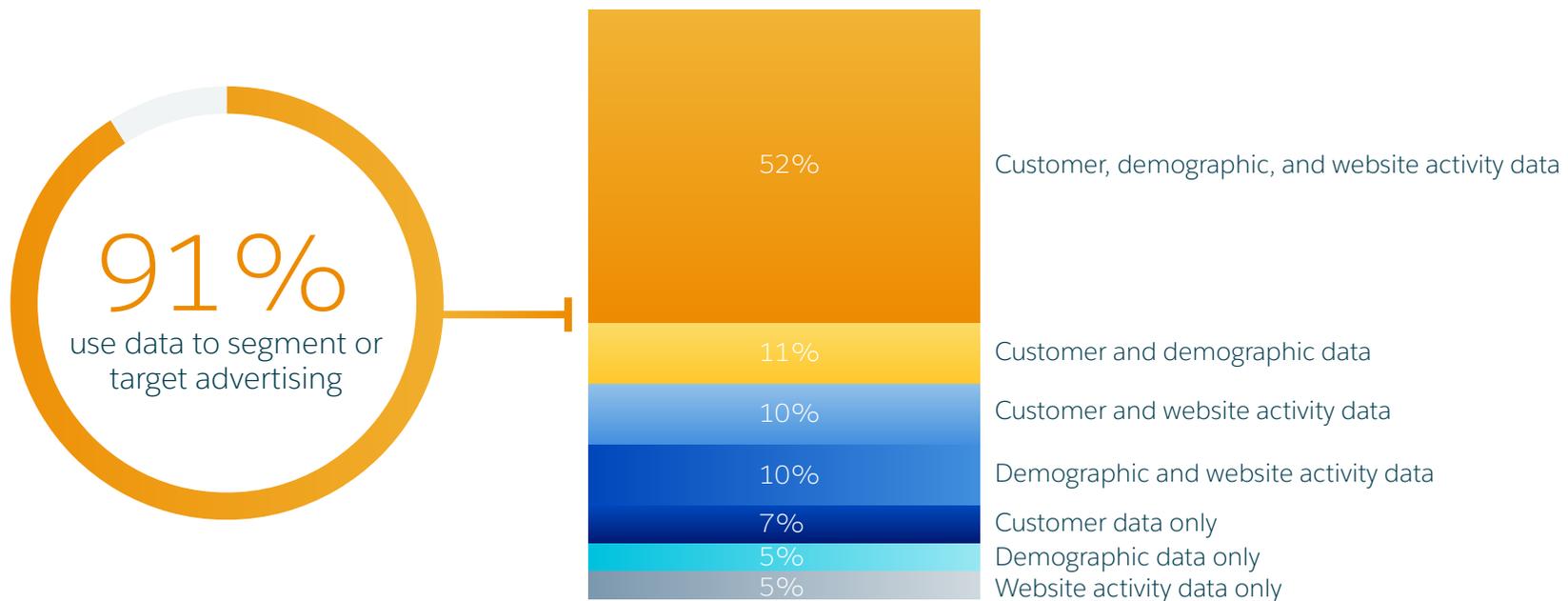
91%
use data to segment or target advertising

| Percentage | Type of data |
|---|---|
| 52% | Customer, demographic, and website activity data |
| 11% | Customer and demographic data |
| 10% | Customer and website activity data |
| 10% | Demographic and website activity data |
| 7% | Customer data only |
| 5% | Demographic data only |
| 5% | Website activity data only |

All data in this section represents respondents who use digital advertising as part of their marketing strategy.

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# Survey Demographics

# Survey
# Demographics

## Company Type

| | |
|---|---|
| Business-to-business | 29% |
| Business-to-consumer | 26% |
| Business-to-business-to-consumer | 45% |

## Industry

| | |
|---|---|
| Consumer products and retail | 14% |
| High tech | 11% |
| Professional services | 11% |
| Engineering, construction, and real estate | 9% |
| Financial services | 9% |
| Education | 8% |
| Media and communications | 8% |
| Hospitality, travel, and transportation | 6% |
| Healthcare and life sciences | 5% |
| Manufacturing | 5% |
| Public sector | 4% |
| Automotive | 3% |
| Agriculture and mining | 2% |
| Energy | 2% |
| Other | 4% |

## Company Size

| | |
|---|---|
| Small (1–100 employees) | 39% |
| Midsize (101–3,500 employees) | 44% |
| Enterprise (3,501+ employees) | 17% |

## Country

| | |
|---|---|
| United States | 32% |
| Canada | 11% |
| United Kingdom | 11% |
| Germany | 10% |
| Japan | 10% |
| Brazil | 9% |
| Australia | 8% |
| France | 7% |
| Netherlands | 1% |
| Nordics (Denmark, Norway, Finland, Sweden) | 1% |

## Region

| | |
|---|---|
| EMEA | 30% |
| APAC | 18% |
| NAM | 43% |
| SAM | 9% |

## Role

| | |
|---|---|
| Owner or equivalent | 27% |
| CEO | 16% |
| CMO | 5% |
| Vice president | 7% |
| Director or equivalent | 23% |
| Team leader, supervisor, or manager | 19% |
| Marketing analyst | 3% |

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