



DIGITAL ROADBLOCK:

Marketers struggle to reinvent themselves.

March 2014

Methodology

- Online survey among a total of 1,004 U.S. marketers
- Data collected February 19-27, 2014 by ResearchNow
- Margin of error at the 95% confidence level for the total sample is +/- 3.1%
- Data was also broken out by the following sub-groups:
 - Companies with (self-reported) below average or average business performance, i.e. had performed similarly to key competitors or had recorded lower sales or revenue than key competitors (n=595) vs. companies with superior business performance, i.e. had out-performed key competitors in terms of sales or revenue (n=409)
 - Companies with high digital spend, or where digital spend was >25% of total marketing budget (n=465), vs. companies with low digital spend, or where digital spend was <10% of total marketing budget (n=153)

Top 10 Findings

Marketers know they must **reinvent themselves, but don't know how.**

1. Sixty-four percent of marketers expect their role to change in the next year; 81% in the next 3 years.
2. While two in five (40%) marketers surveyed stated that they wanted to reinvent themselves, only 14% of those marketers actually know how to go about it.
3. Lack of training in new marketing skills (30%) and organizational inability to adapt (30%) are cited as key obstacles to becoming the marketers they aspire to be.

Future marketers need to **take more risks.**

4. Fifty-four percent of marketers believe the ideal marketer should take more risks and 45% hope to take more risks themselves.
5. Sixty-five percent of marketers say they are more comfortable adopting new technologies once they become mainstream.

Companies need to **hire more digital talent.**

6. Marketers cite digital/social marketers (47%), data analysts (38%), creatives (38%) and mobile marketers (36%) as the key roles companies need to invest in over the next 12 months.

Top 10 Findings

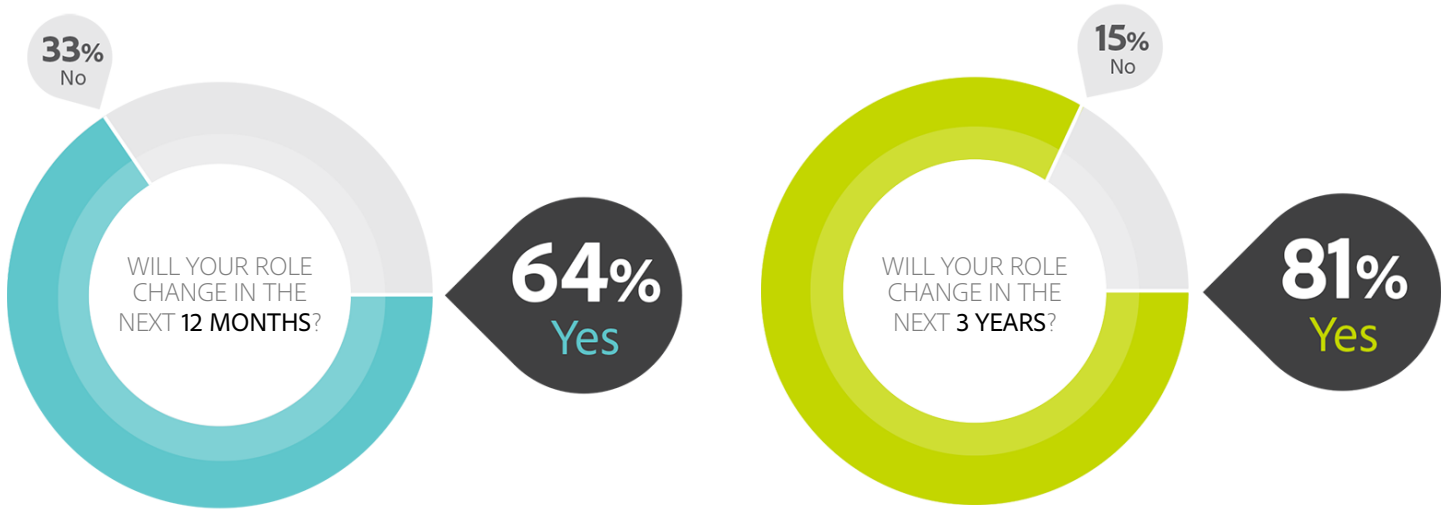
Marketers recognize the importance of data, but **aren't widely using it to make informed decisions.**

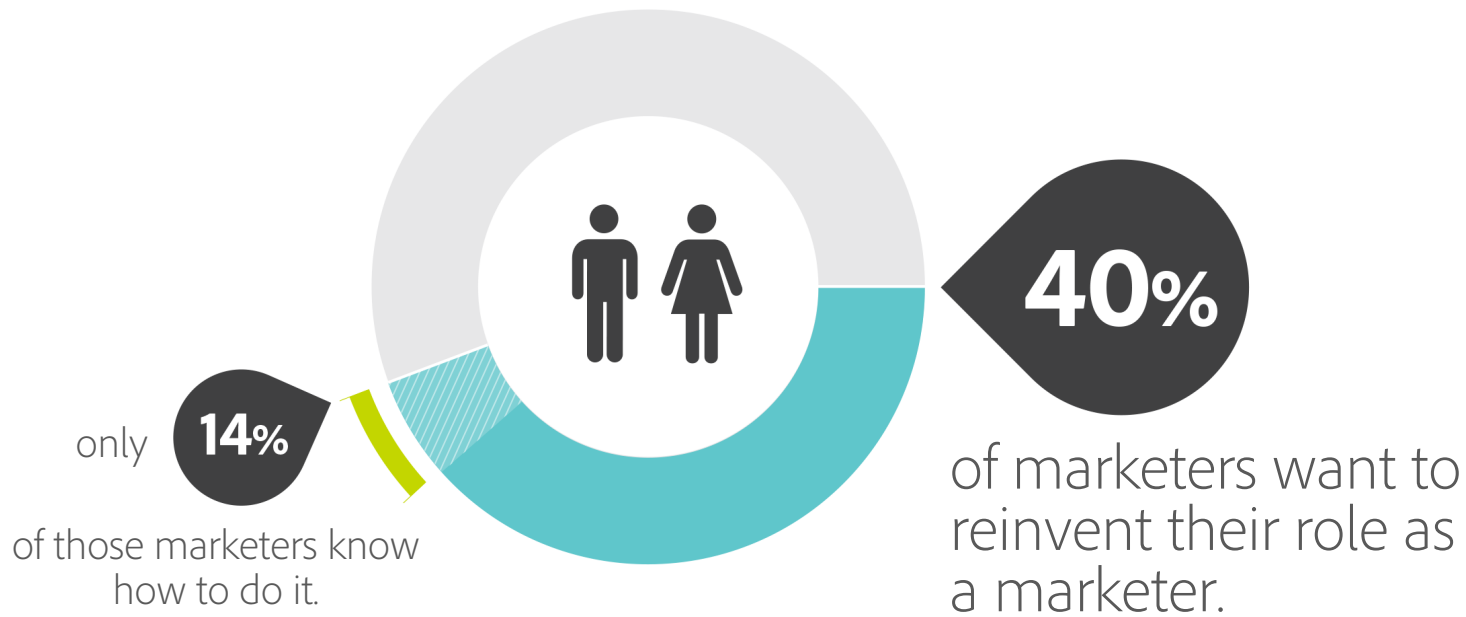
7. The majority of marketers (76%) agree they need to be more data-focused to succeed.
8. Forty-nine percent of marketers report "trusting my gut" to guide decisions on where to invest their marketing budgets.
9. Seventy-two percent of marketers agree that long-term success at their company is tied to proving marketing return on investment.

Mobile and personalization are becoming bigger priorities.

10. Sixty-one percent of marketers see social media as the most critical marketing vehicle to focus on a year from now, followed closely by mobile at 51%. When asked to prioritize one capability that will be most important to their company's marketing moving forward, personalization ranked highest.

Marketers expect their roles to change quickly...and change won't stop

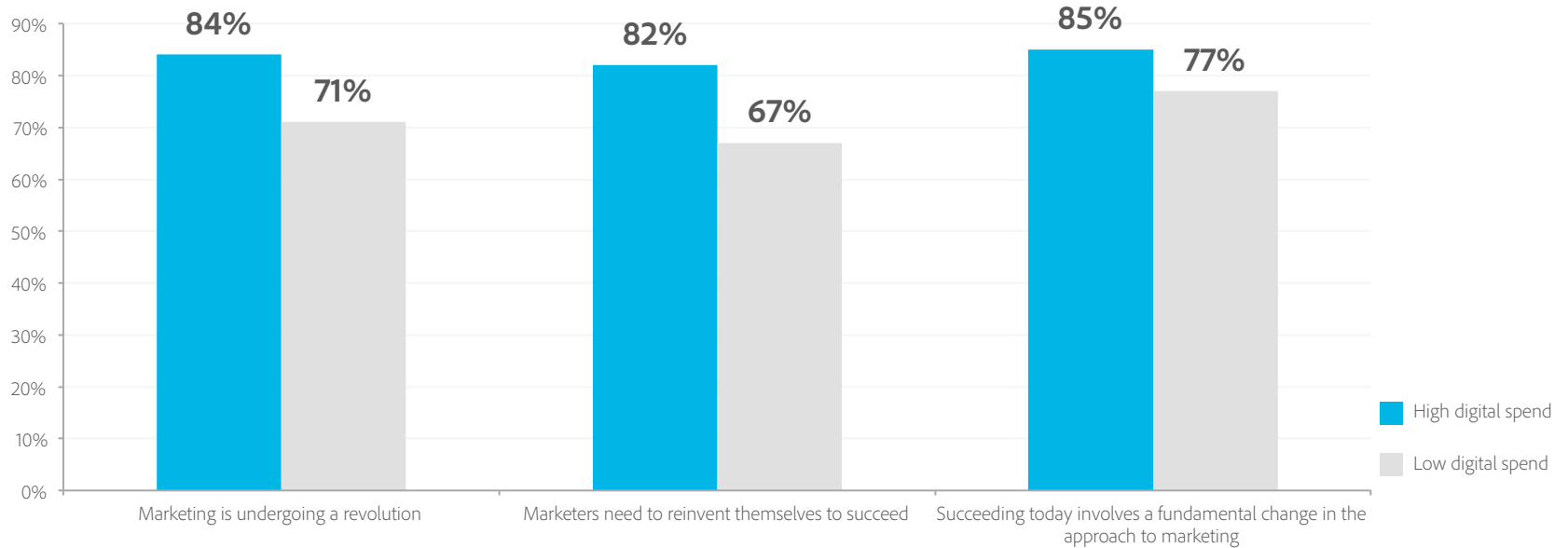




44% High digital spend
33% Low digital spend

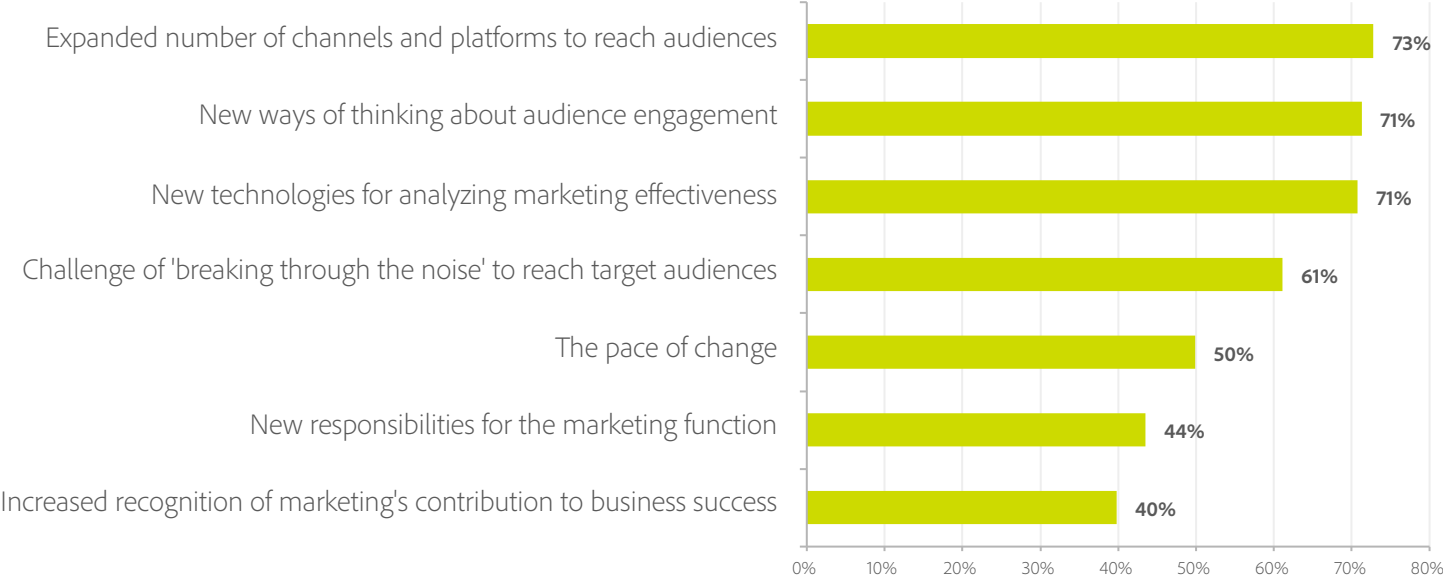
Q24. Please indicate what statement best reflects how you feel about your role? ("I want to reinvent or redefine my role as a marketer") n=1004
Q25. Which of the following statements best describe how you feel? ("I know exactly how to reinvent myself as a marketer") n=406

Companies with high digital spend are more likely to believe that marketers need to reinvent themselves



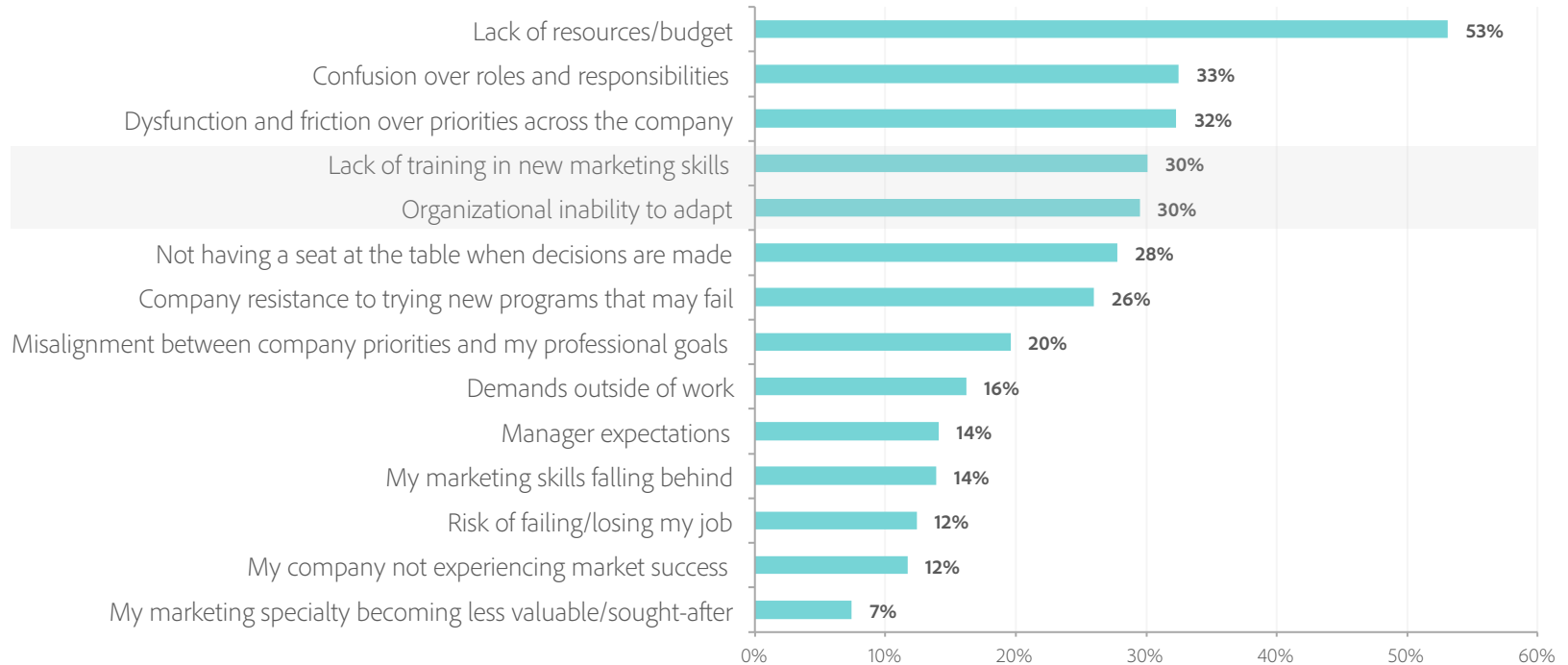
Changing role of marketers driven by increased channels and platforms, new technologies

WHAT ARE THE DRIVING FORCES BEHIND THIS CHANGE?
(RESPONDENTS WHO INDICATED CHANGE IN NEXT 12 MONTHS)



Beyond the age-old issue of budget and resource constraints, marketers cite lack of training in new skills and organizations' inability to adapt as key obstacles

WHAT PREVENTS YOU FROM BECOMING THE MARKETER YOU ASPIRE TO BE?



Real vs. Ideal marketers



Surprisingly

25%

of marketers
characterize
themselves as

CAUTIOUS

(vs. Risk takers)



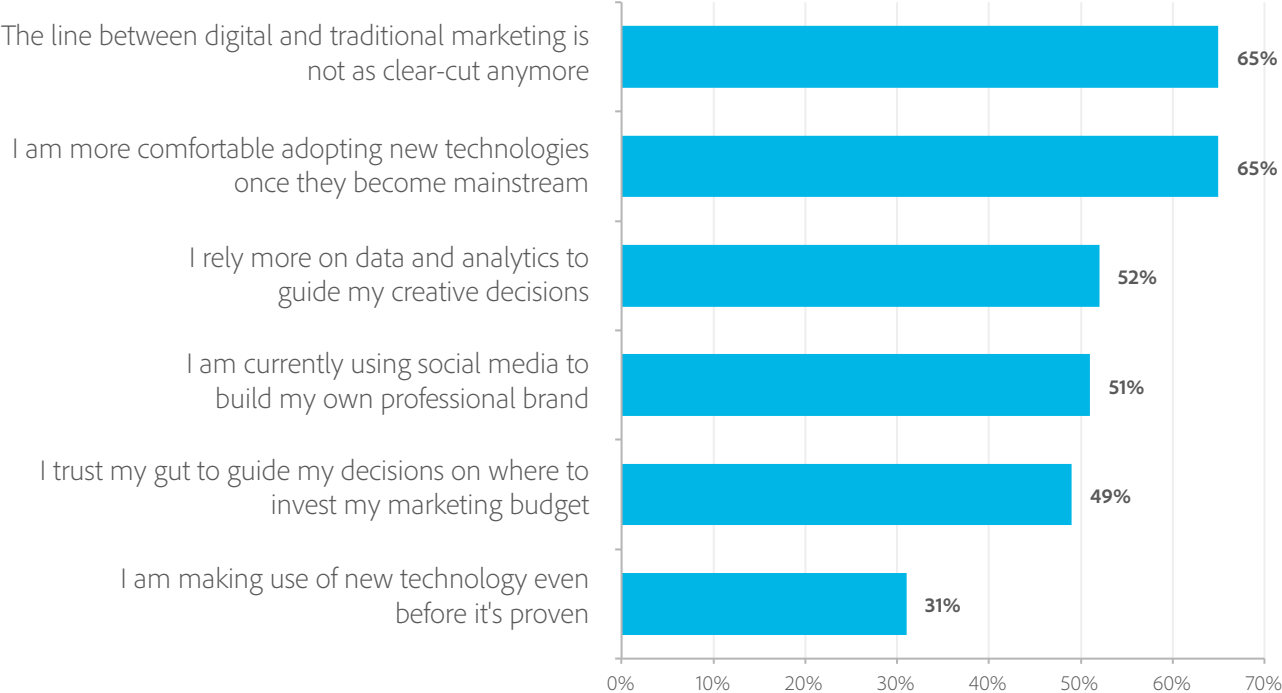
54%

say the ideal
marketer should
take more

RISKS

Half of marketers 'trust their gut' on marketing spend

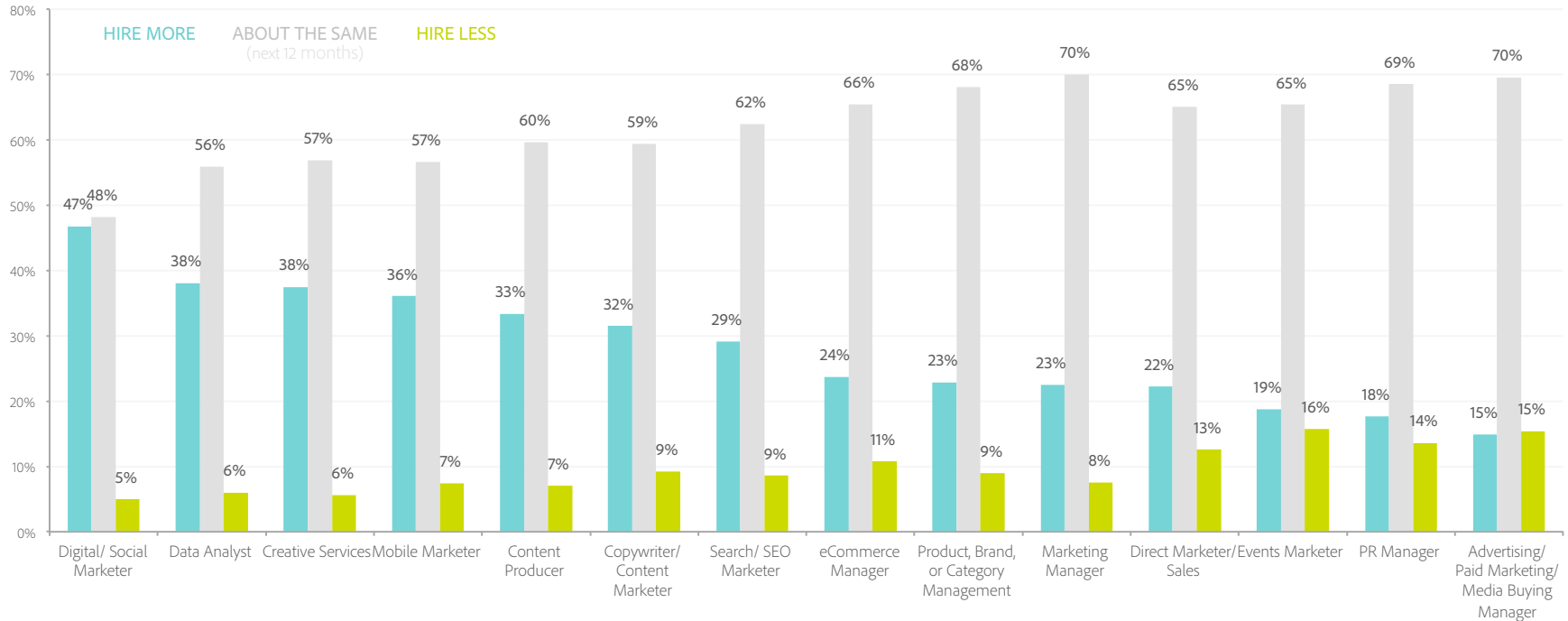
HOW MUCH DO YOU AGREE WITH...? (AGREE NET)



Q12. Below are some statements that may reflect the extent to which your personal approach to marketing may have changed over the last 12 months. Please indicate how much you either agree or disagree with each statement. (TOP BOX) n=1,004

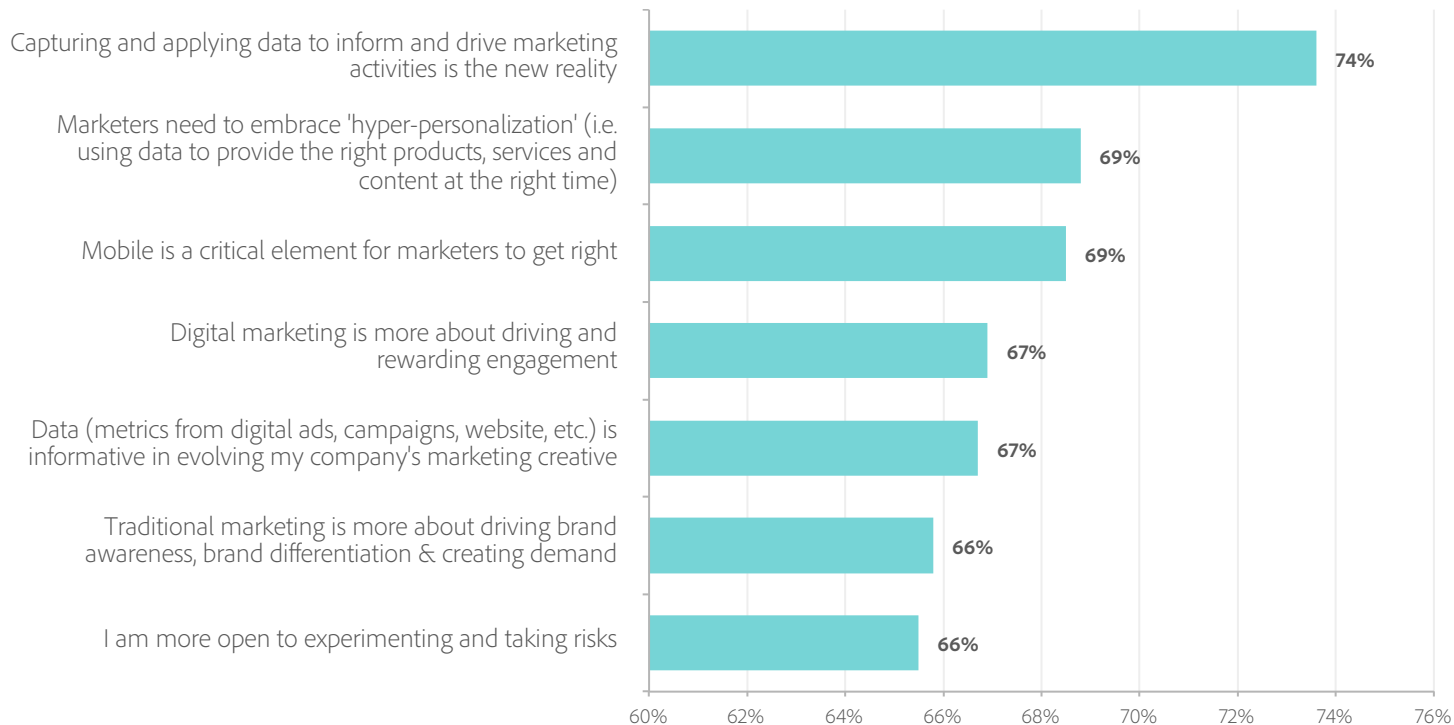
Digital talent seen as most critical for new hires

WHERE DOES YOUR COMPANY NEED TO HIRE MARKETING TALENT?



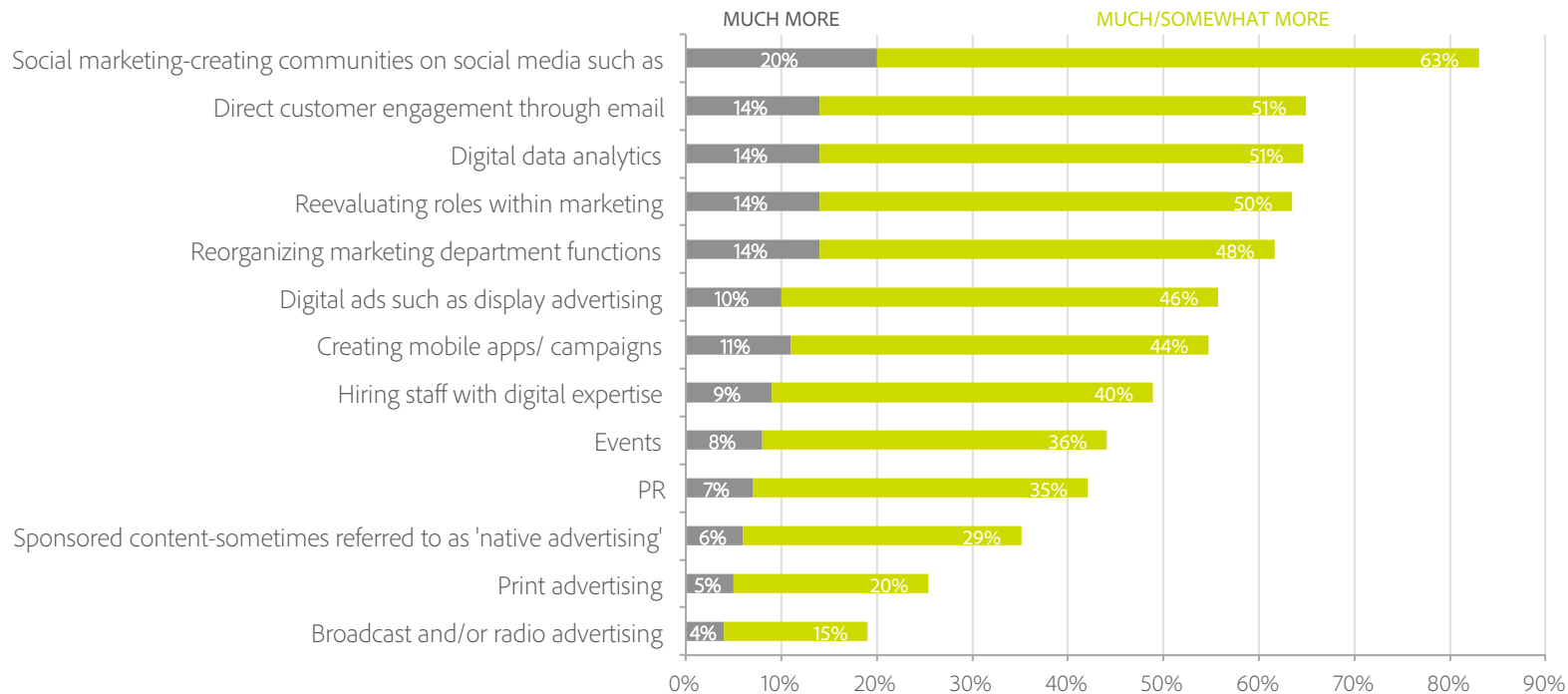
Marketers understand the importance of using data

HOW MUCH DO YOU AGREE WITH...? (AGREE NET)



Q12. Below are some statements that may reflect the extent to which your personal approach to marketing may have changed over the last 12 months. Please indicate how much you either agree or disagree with each statement. (TOP BOX) n=1,004

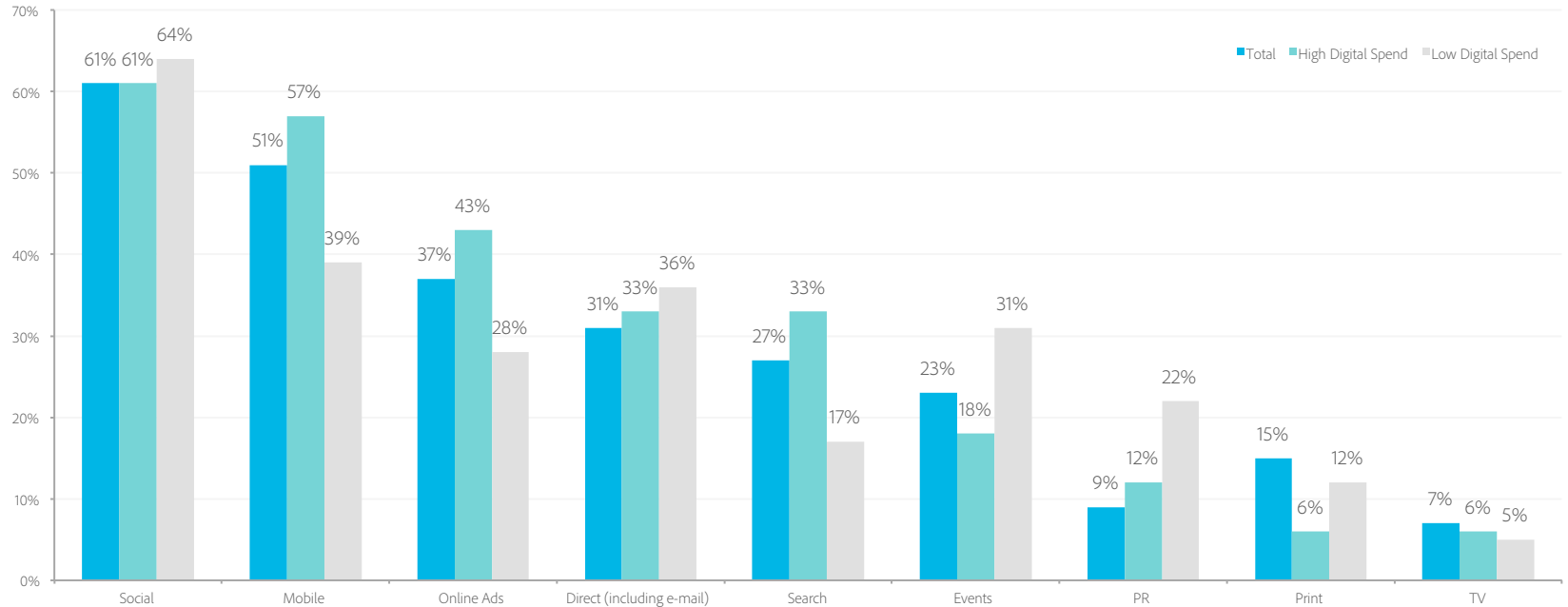
Companies are doing significantly more digital marketing than last year



Q22. Please review the list of activities below and select how much more or less of each activity your company is doing compared to last year. (TOP & BOTTOM BOX) n=1,004

Social and mobile perceived as most critical areas a year from now

WHICH MARKETING TACTICS DO YOU THINK WILL BE MOST CRITICAL IN ONE YEAR? (CHOOSE UP TO THREE)



What will be most important to your company's marketing moving forward?

PERSONALIZATION **33%**

31% High digital spend
36% Low digital spend

BIG DATA **22%**

22% High digital spend
17% Low digital spend

SOCIAL **21%**

21% High digital spend
22% Low digital spend

REL-TIME **14%**

12% High digital spend
18% Low digital spend

MOBILE **11%**

14% High digital spend
7% Low digital spend

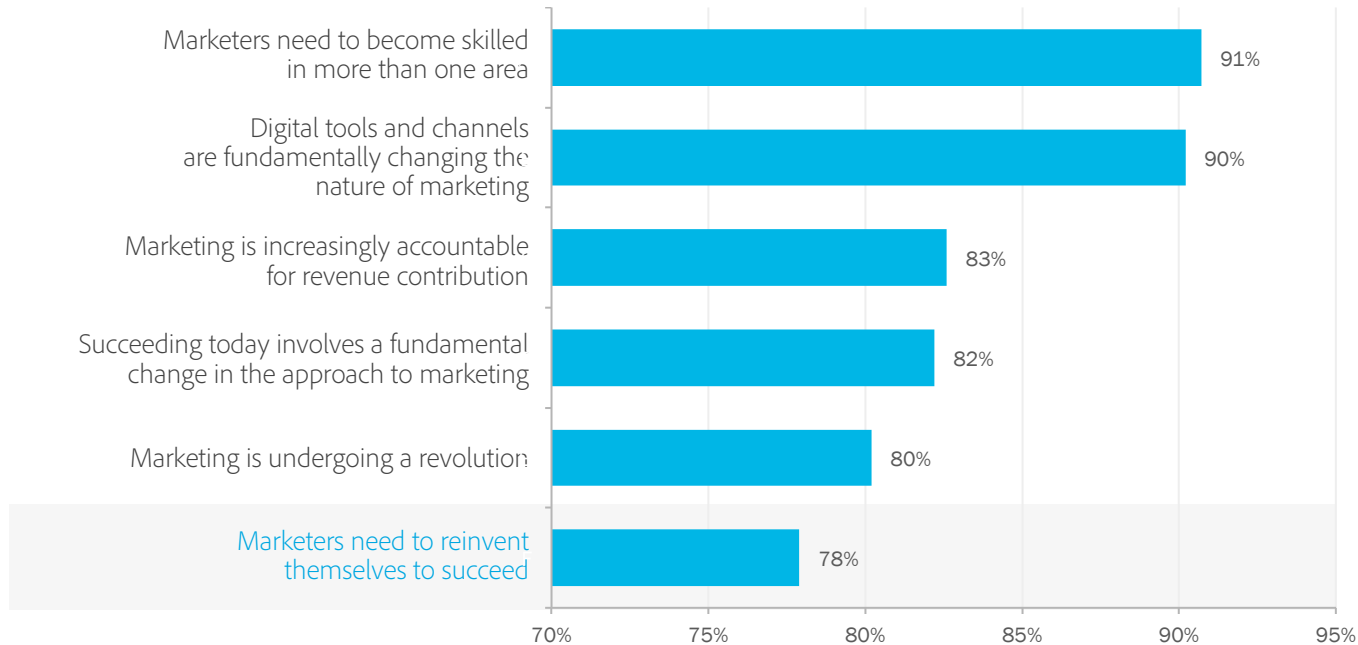


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Appendix: Additional Findings

Marketers agree they need to reinvent themselves to succeed

HOW MUCH DO YOU AGREE WITH...? (AGREE NET)



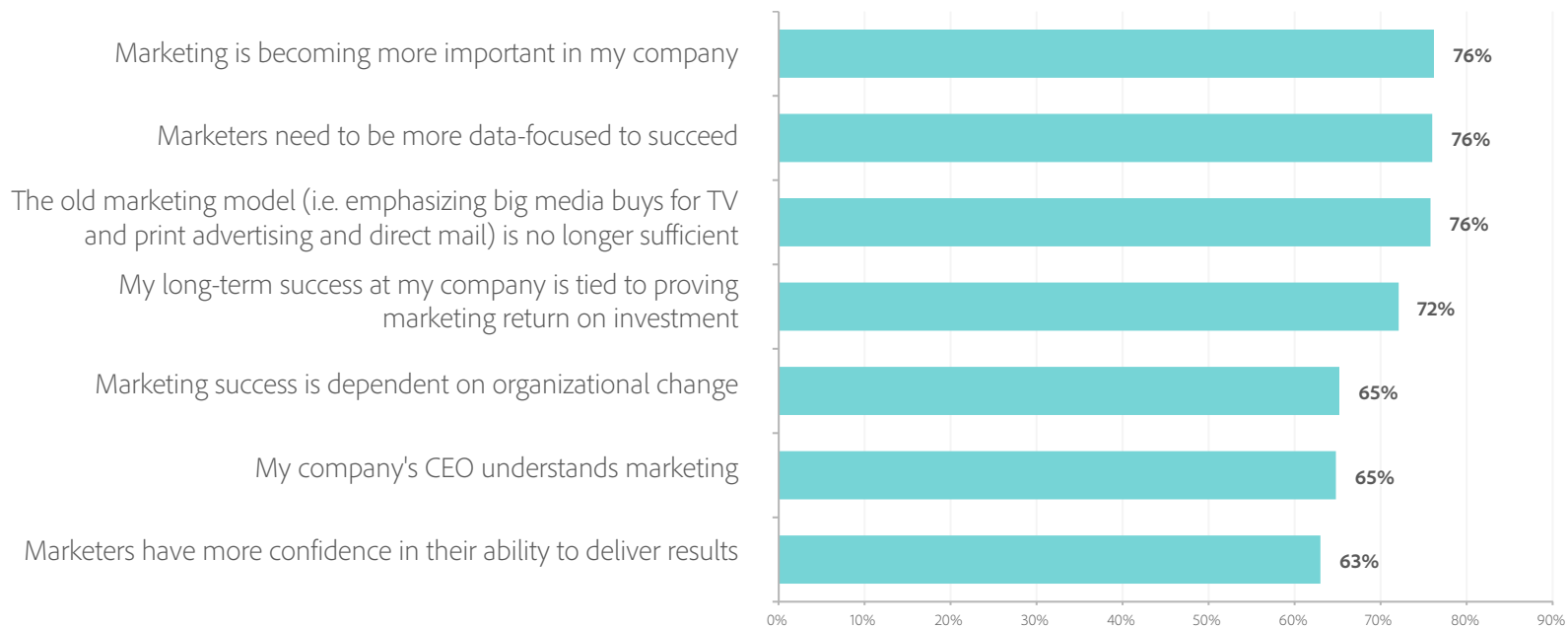
Marketers not widely using data to make informed decisions; they want to take more risks



Q10. As you work to make marketing more effective, which of the following have you been doing more of in the last 12 months?
Q11. As you work to make marketing more effective, which of the following do you hope to do more of in the next 12 months? n=1,004

Three quarters of marketers believe that success lies in being more data-focused

HOW MUCH DO YOU AGREE WITH...? (AGREE NET)



Marketers identify the ability to work across channels as most important success factor

WHICH SPECIFIC BEHAVIOR WILL MAKE THE BIGGEST DIFFERENCE? (SELECT ONE)



High digital spend companies are significantly more likely to say that that data informs their approach to marketing

HIGH
DIGITAL SPEND
(>25%)

38%

Say that marketing is making significant advances

80%

Say that marketers need to be more data-focused to succeed

94%

Say that digital tools and channels are fundamentally changing the nature of marketing

73%

Say that data (metrics from digital ads, campaigns, website, etc.) is informative in evolving their marketing creative

LOW
DIGITAL SPEND
(<10%)

22%

Say that marketing is making significant advances

61%

Say that marketers need to be more data-focused to succeed

82%

Say that digital tools and channels are fundamentally changing the nature of marketing

48%

Say that data (metrics from digital ads, campaigns, website, etc.) is informative in evolving their marketing creative

High-performing companies are more likely to focus on personalizing customer experiences and use data to inform marketing creative

HIGH PERFORMERS

73%

Say that their company's CEO understands marketing

81%

Say that marketing is becoming more important in their company

63%

Say that they are **completely or very** focused on personalizing experiences for customers

28%

Say that data (metrics from digital ads, campaigns, website, etc.) is **strongly** informative in evolving their marketing creative

LOW PERFORMERS

59%

Say that their company's CEO understands marketing

73%

Say that marketing is becoming more important in their company

53%

Say that they are **completely or very** focused on personalizing experiences for customers

21%

Say that data (metrics from digital ads, campaigns, website, etc.) is **strongly** informative in evolving their marketing creative

The majority of marketers say “thinking social first” is something they know or say they should do...but don’t

	TOTAL	High Digital Spend	Low Digital Spend	High Performing	Low Performing
Part of our company mindset	22%	30%	15%	28%	18%
Something we say, but do not do very well	39%	39%	30%	37%	40%
Something we know we should do, but don't	21%	19%	25%	19%	23%
Not something we think about at all	18%	12%	30%	16%	19%
Net (Don't think social first)	78%	70%	85%	72%	82%