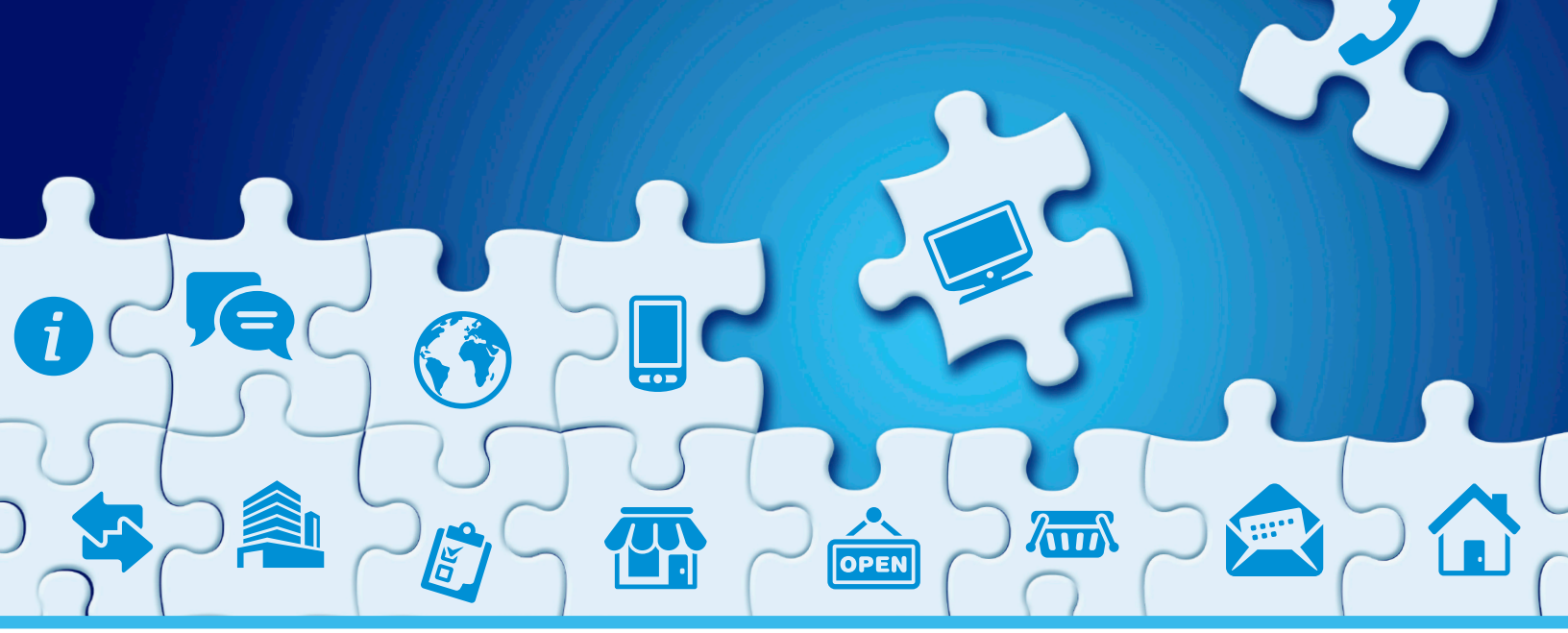

Optimize Omnichannel Engagement With Actionable Consumer Insights

Industry Study & Analysis by

MULTICHANNEL MERCHANT

Exclusive Sponsor

neustar

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Introduction

There are revolutions happening in the way companies capture and analyze customer and prospect data. The explosion in the amount of data and information being created and captured is providing companies with significant opportunities but also challenges. These changes driven by technology are rapidly transforming the marketing industry.

To gauge this transformation, *Multichannel Merchant* and Neustar developed a unique and timely study on how leading companies are leveraging customer data and predictive analytics technology to implement omnichannel marketing strategies and other key initiatives.

The new study, ***Optimize Omnichannel Engagement With Actionable Consumer Insights*** covers trends, best practices, challenges and opportunities for cross-channel consumer engagement by personalizing and synchronizing experiences across multiple touch points. The information and analyses in this report will help executives make more informed decisions and better manage their consumer data and analytics technology strategies and approaches.

The primary information source is an exclusive survey of a cross-section of leading marketing and brand executives. In total, survey responses from 351 marketing and brand executives were used to develop these analyses, including many of the top companies in retail, information technology, consumer products, media, healthcare, travel, financial services and other key sectors.

Areas studied in the report include:

- Top Data and Predictive Analytics and Omnichannel Strategies and Priorities
- Consumer Data Analytics Trends
- Senior Management View of Consumer Data Analytics
- Touch Points and Identifiers
- Customized Website Creative and Messaging
- Revenue, Budgets and Measurement

The findings are broken out by seven key industry sectors in the main parts of the report, and an appendix provides a separate analysis of the findings by marketing budget size ranges.

Multichannel Merchant and Neustar thank all of the respondents for their invaluable contributions to this study.

MULTICHANNEL MERCHANT neustar

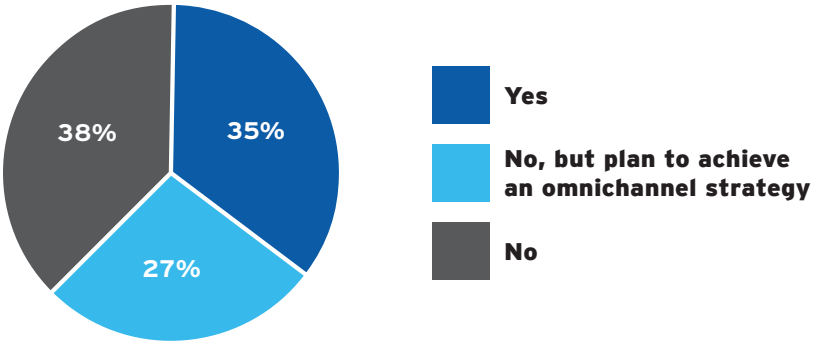
Executive Summary

Based on the survey results, some of the most compelling findings and insights from the study are provided below, followed by additional key results from the survey of leading corporate marketers.

1.) Sixty-Two Percent of Companies Currently Have or Plan to Implement an Omnichannel Strategy

Out of the 62% of companies, 35% have an omichannel strategy currently and 27% plan to implement one in the near-term.

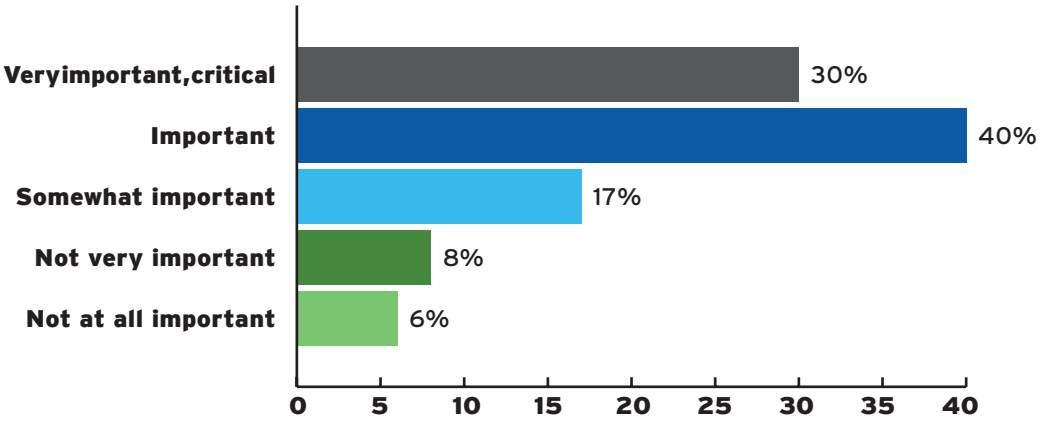
Companies with an Omnichannel Marketing Strategy



2.) Omnichannel Strategies are Very Important/Critical or Important to 70% of Companies

Seven out of ten of the companies surveyed feel having an omnichannel strategy that consistently delivers more personalized and satisfying experiences with customers and prospects across multiple touch points is very important/critical or important. Only 14% of the survey respondents felt having an omnichannel strategy is not important.

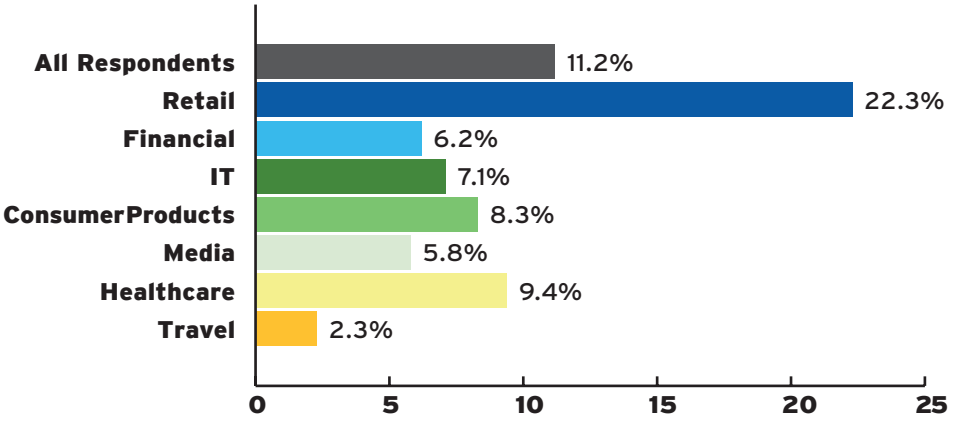
Importance of Omnichannel Strategy



3.) Spending on Customer Data and Predictive Analytics was Forecasted to Grow by Over 11% in 2013

Based on the key industry sector analysis, retailers increased their spending on customer data and predictive analytics technology by over 22% in 2013, the fastest rate out of the seven key industries analyzed in the study. This was followed by the budget increases for these technologies by healthcare organizations (9.4%) and consumer products companies (8.3%).

2013 Spending Forecast



Executive Summary

4.) There's No Consensus on the Most Important Consumer Data Analytics Trends

Interestingly, no single consumer data analytics technology and services trend tracked by the survey received more than 50% of the response in terms of being selected as important. This suggests there are a number of important issues to a range of companies. But the top three trends based on the total responses are (1.) integration with other data, media and marketing programs, (2.) the need to analyze internal data to uncover actionable consumer insights, and (3.) the proliferation of available data sources, providers and platforms. These three areas received between 38% and 48% of the responses.

5.) Delivering Personalized and Satisfying Customer Experiences was the Top Data and Predictive Analytics Strategy and Priority

In contrast to the question on overall key trends, there is more agreement on the specific topic of the top consumer data and predictive analytics technology strategies and priorities. The most commonly cited was to consistently deliver more personalized and satisfying customer experiences, which was selected by 58% of the respondents.

6.) Omnichannel Marketing Provided a Significant Sales Lift

A total of 41% of respondents felt they realized (or they would expect to experience) a sales lift of between 6% to 15% with an integrated omnichannel marketing strategy. A total of 37% said they saw or would expect a sales increase of over 11%.

7.) Most Companies Don't Know the Cost to Their Brand from Negative Customer Experiences

Sixty-nine percent of the responding marketers indicate they did not know the cost to their brands when a customer had a bad experience, although an analysis of the respondents with annual marketing budgets over $50 million finds that 44% say they did in fact know the cost of a negative experience.

The next few Executive Summary pages provide additional key findings.

Biggest Data Challenges and Pain Points

Besides cost, the top challenges and pain points related to data and analytics were finding staff with analytical experience, the time required to learn and use the technology, and overcoming integration issues. The table below compares the total responses to those from retailers only. Lack of staff with analytical expertise, overcoming IT integration issues and data silos were particularly key issues for retailers, as is the ability to analyze and implement the data findings effectively. Retail is the sector that received the highest percentage of survey responses.

	All %	Retailers
Cost	63%	67%
Lack of staff with analytical experience and knowledge to use effectively	54%	65%
Time required to learn and use the platforms	45%	46%
Overcoming IT integration issues and data silos	43%	56%
Analyzing and implementing the data effectively	35%	42%
Inability to action on information in real time at point of contact	22%	19%
Integrating with other marketing and media campaigns and efforts	21%	25%
Getting agreement from key players	19%	14%
Communicating the value and need to senior management	19%	23%
Inability to consistently leverage information across channels	19%	19%
Privacy issues	13%	10%
Other	3%	2%

Senior Management View of Data Analytics

A total of 65% of the respondents indicated their senior management considers consumer data analytics technology, usage and services to be very important/critical or important to their organizations. A total of 66% of the respondents that work for retailers said these technologies and services are very important, critical or important — and an additional 26% feel this area is somewhat important.

	All %	Retailers
Very important, critical	22%	33%
Important	43%	33%
Somewhat important	22%	26%
Not very important	9%	8%
Not at all important	4%	0%

Key Insight

Based on a separate analysis by marketing budget size, a total of 100% of the respondents with marketing budgets over $50 million said these technologies and services are very important/critical or important to their senior management.

Executive Summary

Linking Customer Identifiers

A total of 73% of the respondents said the ability to link all key customer and prospect identifiers or contact points to identify consumers across channels was very important/critical or important.

	All %
Very important, critical	31%
Important	42%
Somewhat important	17%
Not important	11%

About the Respondents

The survey responses reflected a cross-section of leading companies in a number of key industry sectors. For example, 21% were retailers and 11% worked for companies in the consumer products industry. Other key sectors represented include IT, financial services and media. Some of the key job titles of the respondents were Chairman/CEO/President (23%), CMO or Vice President, Marketing including EVP and SVP (15%), Director of Marketing (12%), and Marketing Manager (9%). Thirty-nine percent of the respondents worked for companies with marketing budgets over $1 million, and a total of 17% spend more than $10 million annually on marketing.

The complete survey responses and analysis is provided in the next four chapters of the report.

I.) Data, Predictive Analytics & Omnichannel Strategies

This is the first of four chapters analyzing the complete survey results of marketers and brand executives. Most of the data tables have eight data columns, one for all of the respondents tabulated together next to the key industry sector breakouts. In particular this chapter focuses on omnichannel strategies, top data and predictive analytics priorities, key challenges and pain points, and how senior management views these important areas and opportunities.

Percentage of Marketers with an Omnichannel Strategy

A total of 62% of the survey respondents either currently have an omnichannel strategy or are planning to invest in new technologies to achieve an omnichannel strategy. Retailers and IT companies are the most likely to have an omnichannel approach currently. Forty-seven percent of the financial services companies that responded indicated they do not have an omnichannel strategy but are planning to invest and achieve one.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes	35%	44%	18%	44%	42%	29%	43%	31%
No, but we are planning to invest in new technologies to achieve an omnichannel strategy	27%	29%	47%	22%	31%	29%	21%	8%
No, we do not have plans to implement an omnichannel strategy	38%	27%	35%	33%	27%	41%	36%	62%

Key Insight

A separate analysis of companies with large marketing budgets finds that 64% of organizations with budgets in the $25 to $50 million range and 56% of those with budgets over $50 million currently had an omnichannel strategy in place.

Importance of Omnichannel Strategy

Thirty percent of the respondents indicated having a robust omnichannel strategy was very important/critical to their organizations, and an additional 40% said it was important. Fifty-four percent of consumer products companies said having a robust omnichannel strategy was very important/critical, which is the highest percentage when comparing the major industry sector responses.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Very important, critical	30%	40%	29%	24%	54%	29%	21%	39%
Important	40%	31%	47%	41%	23%	29%	50%	23%
Somewhat important	17%	17%	18%	12%	8%	29%	21%	31%
Not very important	8%	10%	6%	18%	8%	6%	0%	8%
Not at all important	6%	2%	0%	6%	8%	6%	7%	0%

A significant 73% of companies with total marketing budgets in the range of $25 to $50 million said having an omnichannel strategy that consistently delivers more personalized experiences with customers and prospects across multiple touch points was very important/critical.

Cost to Brand from Negative Customer Experience

Most of the responding marketers indicate they did not know the cost to their brands when a customer had a bad experience, although the analysis of the respondents with marketing budgets over $50 million finds that 44% say they did know the cost of negative customer experiences.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes	31%	25%	35%	28%	17%	29%	36%	23%
No	69%	75%	65%	72%	83%	71%	64%	77%

Key Insight

Organizations in the healthcare and financial service sectors indicate they were the most likely to know the cost to their brands from negative customer experiences.

Lift Expected from Omnichannel Marketing

The survey found that omnichannel marketing provided a significant sales lift. A total of 41% of respondents felt they realized (or they would expect to experience) a sales lift of between 6% to 15% with an integrated omnichannel marketing strategy. A total of 37% said they experienced or would expect a sales increase of over 11%.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
1% to 5%	9%	16%	0%	0%	8%	6%	7%	8%
6% to 10%	21%	28%	35%	22%	35%	29%	21%	15%
11% to 15%	20%	10%	35%	6%	35%	18%	21%	31%
16% to 20%	10%	10%	6%	22%	4%	6%	0%	0%
Over 21%	7%	4%	0%	6%	4%	18%	7%	0%
I don't know	34%	33%	24%	44%	15%	24%	43%	46%

Top Data and Predictive Analytics Strategies and Priorities

The survey asked, What are your organization's top consumer data and predictive analytics technology strategies and priorities? The top three responses were:

- Consistently deliver more personalized and satisfying customer experiences, according to 58% of the respondents
- Increase conversion rates and customer acquisition, 50%
- Increase cross-selling, up-selling and retention, 46%

Analyzing the findings by the major industries provides these insights:

- IT companies are most interested in consistently delivering more personalized and satisfying customer experiences, and increasing cross-selling, up-selling and retention, compared to the other major industry sectors.
- Increasing conversion rates and customer acquisition is most important to media companies. Seventy-one percent of media companies indicate that improving marketing campaign measurement by tracking influenced sales across channels is important as well.

Top Data and Predictive Analytics Strategies and Priorities

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Consistently deliver more personalized and satisfying customer experiences	58%	61%	63%	67%	58%	59%	46%	55%
Increase conversion rates and customer acquisition	50%	51%	38%	44%	50%	71%	54%	73%
Increase cross-selling, up-selling and retention	46%	53%	31%	67%	54%	65%	39%	64%
Synchronize the consumer experience when engaging with your brand via multiple channels simultaneously	42%	47%	50%	50%	50%	41%	54%	36%
Improve marketing campaign measurement by tracking influenced sales across channels	40%	39%	31%	33%	50%	71%	54%	36%
Be omnichannel; not channel dependent for all marketing, audience targeting, consumer engagement and customer loyalty initiatives	36%	51%	31%	33%	42%	29%	39%	27%
Create a 360 degree, single view of the customer or prospect across the enterprise	36%	33%	63%	39%	46%	41%	39%	0%
Predictive lead conversion and profitability analysis	32%	28%	31%	17%	27%	47%	31%	46%
Action on real-time consumer intelligence at the point of contact	30%	26%	63%	28%	27%	41%	62%	18%
Instantly and accurately identify customers across channels to enhance customer loyalty program reach and exposure	29%	37%	31%	33%	27%	24%	39%	0%
Other	5%	2%	6%	6%	0%	6%	0%	0%

Key Responses by Marketing Budget Size: Top Consumer Data and Predictive Analytics Strategies and Priorities

Below is a breakout of some of the key findings from the analysis by marketing budget size to this question: What are your organization's top consumer data and predictive analytics technology strategies and priorities?

- Being omnichannel was most important to larger companies. For example, this was important to 70% of companies with marketing budgets in the $25 to $50 million range, and 63% of companies with over $50 million in annual marketing spending. Creating a 360-degree, single view of the customer across the enterprise was also most important to these larger companies, based on their total marketing budget size.
- Synchronizing the consumer experience when engaging with brands via multiple channels simultaneously was most important to companies with marketing budgets over $50 million.
- Increasing conversion rates and customer acquisition were more important to companies with marketing budgets between $1 million to $10 million.

Biggest Data Challenges and Pain Points

Besides cost, the top challenges and pain points related to data and analytics were finding staff with analytical experience, time required to learn and use the technology, and overcoming IT integration issues and data silos. Reviewing the industry-specific breakouts found these interesting differences:

- The staff experience issue was of most concern to media companies.
- Overcoming IT integration issues and data silos was most pronounced for retailers, as was the ability to analyze and implement the data effectively.

Biggest Data Challenges and Pain Points

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Cost	63%	67%	41%	61%	62%	82%	69%	69%
Lack of staff with analytical experience and knowledge to use effectively	54%	65%	41%	56%	50%	88%	39%	54%
Time required to learn and use the platforms	45%	46%	47%	50%	40%	53%	46%	54%
Overcoming IT integration issues and data silos	43%	56%	47%	22%	35%	41%	54%	39%
Analyzing and implementing the data effectively	35%	42%	24%	17%	39%	29%	39%	39%
Inability to action on this information in real time, at the point of contact	22%	19%	35%	11%	23%	24%	31%	23%
Integrating with other marketing and media campaigns and efforts	21%	25%	24%	22%	23%	41%	15%	15%
Getting agreement from key players	19%	14%	24%	17%	19%	18%	39%	23%
Communicating the value and need to senior management	19%	23%	24%	11%	31%	29%	8%	0%
Inability to consistently leverage this information across multiple channels	19%	19%	18%	33%	15%	29%	15%	15%
Privacy issues	13%	10%	12%	17%	8%	24%	15%	15%
Other	3%	2%	0%	6%	0%	0%	0%	0%

Most Important Consumer Data Analytics Trends

Interestingly there was no single consumer data analytics technology and services trend posed in the survey that received more than 50% of the response in terms of being considered important. But the top three based on the total response are (1.) integration with other data, media and marketing programs and efforts, (2.) the need to analyze internal data to uncover actionable consumer insights, and (3.) the proliferation of available data sources, providers and platforms.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Integration with other data, media and marketing programs and efforts	48%	49%	47%	28%	42%	53%	55%	55%
Need to analyze internal data to uncover actionable consumer insights	44%	55%	53%	44%	50%	65%	64%	27%
Proliferation of available data sources, providers and platforms	38%	33%	41%	39%	50%	53%	46%	27%
Need to integrate external demographic, psychographic and propensity data to gain deeper consumer insights	30%	31%	35%	39%	39%	47%	36%	27%
Senior executive management interest in this area	28%	31%	24%	39%	19%	35%	27%	9%
Competitor use of these technologies and platforms	21%	20%	12%	28%	42%	35%	27%	27%
Other	3%	2%	0%	0%	0%	0%	0%	0%

Senior Management View of Data Analytics

A significant percentage of senior management considered consumer data analytics technology, usage and services to be very important/critical or important to their organizations. The survey found senior management most valued these technologies in the healthcare and financial industries. A total of 100% of the respondents with marketing budgets over $50 million said these technologies and services were very important, critical or important to their organizations.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Very important, critical	22%	33%	35%	17%	24%	35%	31%	8%
Important	43%	33%	41%	50%	44%	29%	54%	54%
Somewhat important	22%	26%	6%	22%	16%	29%	15%	15%
Not very important	9%	8%	18%	6%	8%	6%	0%	15%
Not at all important	4%	0%	0%	6%	8%	0%	0%	8%

Key Insights

On the question of the most important consumer data analytics trends, the industry sector breakouts found the following:

- Integration with other data, media and marketing programs and efforts was of most importance to healthcare and travel companies.
- The need to analyze internal data to uncover actionable consumer insights was of highest concern to the media and healthcare sectors.
- Integrating external demographic, psychographic and propensity data to gain deeper consumer insights was of most interest to media companies.
- Senior executive management interest in consumer data analytics was of highest importance for IT and media companies.

II.) Touch Points & Customer Identifiers

This chapter covers trends and issues related to consumer insights, touch points and data identifiers.

Consumer Insights of Most Benefit from Accessing at Point of Interaction

The top three most important — or most sought-after — consumer insights companies captured or would most benefit from accessing in real time at the point of contact were:

- Purchase propensities and buying behaviors, according to 58% of respondents
- Profitability and lifetime value, 51%
- Purchase history, 49%

The industry sector analysis found:

- Purchase propensities and buying behaviors were most important to IT companies and retailers.
- Profitability and lifetime value were most important to healthcare.
- Purchase history was key to retailers.
- Demographic data was most important to the travel industry.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Purchase propensities and buying behaviors	58%	67%	53%	71%	62%	65%	50%	54%
Profitability and lifetime value	51%	55%	59%	29%	58%	53%	83%	31%
Purchase history	49%	75%	41%	35%	62%	53%	42%	46%
Demographics data	44%	41%	53%	47%	39%	53%	25%	62%
Requests and communications	39%	35%	47%	24%	54%	59%	50%	54%
Psychographic and lifestyle data	36%	33%	29%	29%	35%	76%	42%	46%
Geographic home location	26%	33%	0%	24%	27%	29%	17%	39%
Other	3%	2%	0%	0%	0%	0%	0%	8%

Key Insight

Accessing psychographic and lifestyle data at key points of consumer interaction was by far of most interest to media companies.

Critical Customer Touch Points

The survey asked: Which of the following customer touch points were considered to be very important / critical to your organization? Not surprisingly website was number one, followed by email and search engines. Rounding out the top five most critical customer touch points were mobile and social media.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Website	87%	90%	88%	100%	81%	88%	62%	92%
Email	68%	75%	71%	44%	65%	77%	92%	62%
Search Engines	61%	67%	41%	56%	69%	53%	69%	62%
Mobile	54%	62%	53%	56%	54%	71%	54%	69%
Social Media	53%	54%	41%	56%	58%	65%	61%	54%
Landing Pages	46%	54%	77%	50%	35%	59%	31%	46%
Online Advertising	41%	60%	24%	33%	31%	82%	23%	23%
Direct Mail	33%	46%	40%	22%	27%	12%	54%	0%
Call Center/IVR	26%	39%	59%	28%	19%	18%	39%	23%
Print	24%	29%	35%	17%	35%	12%	31%	0%
Retail Store/Branch	21%	56%	12%	0%	26%	6%	8%	23%
TV	14%	12%	29%	6%	27%	24%	8%	0%
Radio	11%	10%	24%	0%	15%	24%	15%	15%
Outdoor Advertising	7%	8%	6%	6%	8%	12%	0%	15%

Touch Point Areas for Additional Customer Insights

The touch points that did or would provide the most benefit from accessing additional customer and prospect demographic, psychographic and behavioral insights were mainly websites, email and mobile. The website touch point was most important to IT companies and retailers. Email was found to be most important to healthcare, financial and media companies.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Website	76%	79%	77%	89%	77%	71%	69%	69%
Email	45%	39%	53%	44%	42%	53%	54%	46%
Mobile	43%	40%	47%	56%	46%	65%	39%	54%
Social Media	40%	29%	18%	39%	39%	53%	62%	54%
Search Engines	36%	40%	24%	39%	42%	41%	23%	39%
Online Advertising	31%	27%	24%	28%	19%	65%	31%	39%
Landing Pages	31%	23%	47%	39%	23.1%	41%	31%	39%
Direct Mail	20%	27%	18%	0%	15%	18%	23%	8%
Call Center/IVR	16%	21%	41%	22%	12%	18%	8%	23%
Retail Store/Branch	14%	35%	12%	0%	12%	18%	8%	15%
Print	11%	14%	6%	0%	12%	12%	15%	15%
TV	10%	6%	12%	6%	27%	12%	8%	8%
Radio	6%	4%	12%	0%	12%	6%	0%	8%
Outdoor Advertising	3%	4%	0%	0%	4%	6%	0%	23%

Level of Current Consumer Data Accessed by Touch Point

The survey posed this question: In general, what level of consumer demographic, psychographic and behavioral data did you currently leverage at the following digital and physical touch points? The table below breaks out the findings by high level, medium, low and none. Well under one-third of the respondents indicated any of their consumer touch points currently connected with or accessed a high level of demographic, psychographic and behavioral data.

All Respondents	High Level	Medium	Low	None
Website	28%	32%	29%	11%
Email	22%	35%	29%	14%
Search Engines	19%	31%	25%	25%
Social Media	17%	23%	38%	22%
Online Advertising	13%	31%	28%	29%
Mobile	12%	23%	28%	37%
Landing Pages	11%	33%	30%	26%
Direct Mail	9%	26%	28%	37%
Call Center/IVR	8%	23%	19%	49%
Retail Store/Branch	8%	15%	15%	62%
TV	7%	10%	14%	69%
Print	7%	18%	29%	47%
Radio	4%	10%	17%	69%
Outdoor Advertising	2%	8%	14%	76%

Consumer Data Identifiers

For the entire group of respondents, the top five most important consumer data identifiers were:

- Email address, according to 66% of marketers
- Online cookie, 31%
- Mobile phone number, 29%
- Home address, 29%
- IP address, 25%

Email data identifiers were the most important to IT and media companies. Cookies were most important to retailers.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Email address	66%	72%	71%	83%	65%	82%	64%	54%
Online cookie	31%	46%	18%	44%	35%	35%	21%	31%
Mobile phone number	29%	22%	12%	50%	35%	29%	50%	15%
Home address	29%	42%	29%	11%	42%	24%	36%	15%
IP address	25%	20%	12%	28%	23%	59%	29%	15%
Landline phone number	24%	24%	18%	44%	23%	18%	29%	39%
None	15%	12%	18%	6%	19%	0%	7%	31%
Other	4%	8%	0%	6%	0%	0%	7%	0%

Linking Customer Identifiers

Thirty-one percent of marketers said the ability to link all key customer and prospect identifiers or contact points to identify consumers across channels was very important/critical. Forty-two percent said this ability was important to their organizations.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Very important, critical	31%	43%	31%	22%	31%	41%	17%	17%
Important	42%	33%	44%	56%	46%	47%	50%	50%
Somewhat important	17%	14%	13%	17%	15%	0%	33%	25%
Not very important	6%	6%	13%	0%	4%	6%	0%	8%
Not at all important	5%	4%	0%	6%	4%	6%	0%	0%

Key Responses by Marketing Budget Size: Linking Key Customer and Prospect Identifiers or Contact Points

Below is a breakout of some of the key findings from the analysis of marketing budget size to the question on the importance of linking key customer and prospect identifiers or contact points to identify consumers across channels.

Respondents Selecting "Very Important/Critical":

- $1 to $5 million marketing budget: 23%
- $5 to $10 million marketing budget: 22%
- $10 to $25 million marketing budget: 22%
- $25 to $50 million marketing budget: 64%
- Over $50 million marketing budget: 60%

III.) Customized Website Creative & Messaging

This section of the report covers customized creative, offers and messaging, and the use of internal CRM and third-party data. Also included is a question on the importance of accurately measuring impact across marketing channels.

Custom Website Experiences

Exactly half of the survey respondents indicated they currently did not use internal/CRM or 3rd party data to create custom website experiences for visitors. Healthcare and consumer products companies were the most likely to use both internal/CRM and 3rd party data to provide custom website experiences.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes, both internal/CRM and 3rd party data	19%	18%	12%	28%	35%	18%	36%	15%
Yes, internal/CRM only	19%	12%	29%	17%	23%	18%	7%	23%
Yes, 3rd party data only	7%	10%	6%	6%	4%	12%	7%	8%
No	50%	56%	53%	50%	39%	53%	50%	39%
I don't know	4%	4%	0%	0%	0%	0%	0%	15%

Customized Website Creative, Offers and Messaging

Only a small portion of companies provided customized creative, offers or messaging for each visitor to their websites, but 30% plan to offer this over the next six months.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes, for both authenticated and anonymous site visitors	11%	10%	6%	11%	23%	12%	14%	8%
Yes, but only for authenticated site visitors	14%	10%	29%	28%	12%	6%	21%	8%
No, but we have plans to implement this technology in the next 6 months	30%	43%	12%	28%	31%	29%	21%	31%
No, and we do not have any plans to implement	40%	35%	53%	33%	31%	53%	29%	39%
I don't know	5%	2%	0%	0%	4%	0%	14%	15%

Key Insight

Forty-three percent of the retailer respondents indicated they currently did not provide customized creative or messaging for visitors to their websites, although they have plans to implement this technology in the next 6 months.

Importance of Accurately Measuring Marketing Impact Across Channel

A total of 78% of the respondents said it was very important/critical or important to accurately measure the impact of their marketing on sales across channels. This type of measurement was most important to consumer products companies. The ability to measure impact across channels was rated as more important to the largest companies, based on cross-tabulation analysis by marketing budget size.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Very important, critical	37%	43%	35%	33%	48%	47%	31%	39%
Important	41%	41%	53%	44%	44%	24%	54%	46%
Somewhat important	13%	12%	6%	17%	4%	6%	15%	0%
Not very important	6%	4%	6%	6%	0%	24%	0%	8%
Not at all important	3%	0%	0%	0%	4%	0%	0%	8%

IV.) Revenue, Budgets & Measurement

At the core, the focus on consumer data and analytics technology relates to increasing sales. This key chapter analyzes a number of areas including revenue, budgets and measurement as well as targeting, offline sales impact from online advertising, loyalty programs, and sales representative compensation strategy.

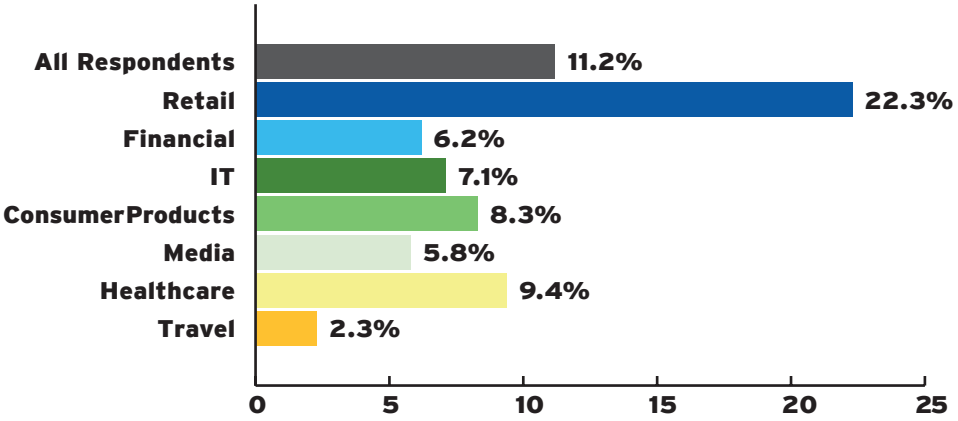
Customer Data and Predictive Analytics Spending in 2012

While 42% of the respondents said their organizations spent under $25,000 on customer data and predictive analytics technology and services in 2012, 22% spent over $100,000. The exact survey question was: How much did your organization spend on all customer data and predictive analytics technologies, platforms and related services in calendar year 2012?

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Less than $25,000	42%	39%	12%	29%	39%	59%	43%	46%
$25,001 to $50,000	8%	0%	12%	12%	8%	6%	14%	15%
$50,001 to $100,000	8%	8%	12%	6%	8%	6%	0%	8%
$100,001 to $250,000	6%	4%	6%	12%	12%	0%	14%	0%
$250,001 to $500,000	6%	8%	0%	6%	12%	12%	0%	0%
$500,001 to $1 million	3%	4%	6%	12%	8%	0%	0%	0%
Over $1 million	7%	14%	24%	0%	8%	12%	7%	0%
Don't know / unsure	21%	24%	29%	24%	8%	6%	21%	31%

Customer Data and Predictive Analytics Budget Growth 2013

Based on the key industry sector analysis, retailers increased their spending on customer data and predictive analytics technology at the fastest rate — over 22%. This was followed by the budget increase by healthcare organizations (9.4%) and consumer products companies (8.3%). These were strong growth rates reflected by the importance and focus on customer data and predictive analytics technology and services. The survey posed this question: Please provide a growth rate forecast for your organization's total customer data and predictive analytics technology and services platform purchase and marketing budget in 2013 compared to 2012.



Cost of Inability to Measure Cross-Channel

The survey asked: What is the cost to your business of not being able to accurately measure cross-channel campaign performance and lacking these insights to optimize campaigns? While over half indicated they did not know, 22% said this cost was likely over $100,000, and 10% said it was over $500,000.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Less than $50,000	17%	14%	12%	28%	12%	18%	21%	8%
$50,001 to $100,000	9%	8%	12%	6%	19%	6%	14%	15%
$100,001 to $250,000	7%	4%	12%	11%	15%	6%	0%	0%
$250,001 to $500,000	5%	10%	0%	0%	12%	6%	14%	0%
$500,001 to $1,000,000	5%	6%	6%	0%	12%	6%	7%	0%
Over $1,000,001	5%	4%	12%	17%	4%	12%	0%	0%
I don't know	52%	56%	47%	39%	27%	47%	43%	77%

Revenue by Channel

Overall based on the total response, the website provided the greatest percentage of revenue tied to customer data and analytics.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Web %	34.3%	28.7%	20.1%	44.7%	25.3%	59.4%	35.2%	57.7%
Store %	23.2%	50.2%	17.5%	2.3%	42.5%	5.3%	5.4%	11.4%
Call Center %	10.7%	7.0%	19.6%	15.7%	5.6%	4.4%	18.4%	12.1%
Direct Mail %	11.1%	9.3%	17.1%	7.5%	17.5%	6.9%	26.7%	8.6%
Other %	20.8%	4.8%	25.7%	29.8%	9.0%	24.1%	14.3%	10.2%

Tracking Offline Sales Impact by Online Advertising

Forty-six percent of the respondents indicated they were unable to track the impact of online advertising on offline conversions. But they felt they would benefit from optimizing campaigns with these insights.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
We cannot track these offline conversions today, but we would benefit from optimizing our campaigns with these insights	46%	48%	53%	50%	75%	35%	46%	39%
We cannot track these offline conversions today and do not have a business need for this tracking	41%	29%	29%	44%	21%	59%	54%	54%
Yes, we do track these offline conversions	13%	23%	18%	6%	4%	6%	0%	8%

Sales Rep Compensation Strategy

Nearly seven out of ten companies had employee compensation strategies that encourage sales via any channel.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Sales reps are incentivized and compensated for driving sales across all channels	69%	63%	71%	72%	74%	77%	73%	58%
Sales reps are discouraged from losing a sale from one channel to another channel	31%	37%	29%	28%	26%	23%	27%	42%

Customer Loyalty Program Strategy

The survey asked: What is your customer loyalty program strategy as it pertains to targeting and engagement across channels? Twenty-seven percent of the respondents selected this answer: We have a small customer loyalty program that targets customers via specific channels, but is not synchronized for cross-channel engagement.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
We have an omnichannel customer loyalty program that precisely targets and accurately identifies customers, and synchronizes cross-channel engagement	10%	12%	0%	17%	19%	6%	23%	23%
We have a robust customer loyalty program that targets customers via specific channels, but is not synchronized for cross-channel engagement	17%	21%	29%	0%	23%	12%	8%	8%
We have a small customer loyalty program that targets customers via specific channels, but is not synchronized for cross-channel engagement	27%	23%	18%	44%	35%	29%	39%	15%
We do not have a customer loyalty program because it is not a priority	46%	44%	53%	39%	23%	53%	31%	54%

Leveraging Offline CRM Data to Understand Online Target Audience

Only 22% of the marketers that responded to the survey said they are able to leverage offline CRM and conversion data to better understand their online target audience, although 52% would like to be able to do this.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes	22%	26%	12%	24%	23%	18%	31%	39%
No, but we would like to do this	52%	56%	59%	47%	58%	47%	54%	23%
No, there is no business need	26%	18%	29%	29%	19%	35%	15%	39%

Key Insight

Financial services providers, consumer products companies, and retailers were the most interested in implementing new programs to use offline CRM and conversion data to better understand their online target audience.

Leveraging Online Interaction Data to Understand Offline Target Audience

Twenty-three percent of the marketers indicated they currently leverage online interaction and conversion data to understand offline target audiences and foster conversations.

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Yes	23%	19%	18%	29%	20%	24%	39%	23%
No, but we would like to do this	56%	69%	53%	53%	60%	53%	46%	46%
No, there is no business need	21%	12%	29%	18%	20%	24%	15%	31%

Conclusion

The marketing industry is moving very quickly to embrace consumer data and analytics technology and services to better understand and serve customers and prospects. Related to this is the desire to be truly omnichannel and leverage the full range of customer data and predictive analytics available to implement marketing strategies, develop new products and services, and other key initiatives.

A key goal of this study was to put hard numbers and analysis on the key areas and themes impacting technology, marketing and retail. And the statistics are significant. Consider that 62% of companies had an omichannel strategy or planned to implement one in the near-term. And an even larger percentage — 70% — felt having an omnichannel strategy that consistently delivered more personalized experiences with customers and prospects across multiple touch points was critical or important to their organizations.

At the core, the focus on consumer data and analytics technology relates to increasing sales and driving revenue, and the findings from the survey suggested the benefit is significant. In short, successful omnichannel marketing strategies provided a significant increase in sales. Consider that a total of 41% of respondents felt they realized (or they would expect to experience) a sales lift of between 6% to 15% with an integrated omnichannel marketing strategy. And a total of 37% said they saw or expected an increase of over 11%.

Another key finding from the study was that corporations increased their budgets for customer data and predictive analytics technologies. Overall across all the industry categories covered in the study in 2013 the respondents increased their spending on customer data and predictive analytics by more than 11%. Retailers increased their spending by over 22%.

The customer data capture and analytics revolution is well underway, but this trend is still relatively new. There are challenges such as finding staff with analytical experience, overcoming integration issues and also simply knowing how to use the data and insights that are generated from these technologies and services.

The opportunities are significant, and many companies including industry leaders have only recently started to test and investigate some of the strategies and approaches covered in this study. For example a key insight from the survey data was that a significant 43% of retailers did not provide customized creative or messaging for visitors to their websites, although they had plans to implement this technology in the next six months. Clearly, the next few months and years will continue to see increased interest, usage and investment as well as important new learning around the key area of customer data and predictive analytics technology.

For even more unique analysis, please review the next few pages of the report, the Appendix with *Key Findings by Organization Marketing Budget Size.*

Appendix: Key Findings by Organization Marketing Budget Size

This appendix provides some of the survey findings with a focus on the larger organizations. Specifically, many of the key survey question responses are broken out by the following marketing budget ranges:

- $1,000,001 to $5,000,000
- $5,000,001 to $10,000,000
- $10,000,001 to $25,000,000
- $25,000,001 to $50,000,000
- Over $50,000,000

Do you have an omnichannel marketing strategy in place?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes	55%	30%	55%	64%	56%
No, but we are planning to invest in new technologies to achieve an omnichannel strategy	23%	35%	9%	27%	38%
No, we do not have plans to implement an omnichannel strategy	23%	35%	36%	9%	6%

How important is having an omnichannel strategy that consistently delivers more personalized and satisfying experiences with customers and prospects across multiple, cross-channel touch points?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Very important, critical	42%	30%	46%	73%	47%
Important	39%	35%	18%	18%	40%
Somewhat important	16%	15%	18%	0%	7%
Not very important	3%	5%	18%	0%	0%
Not at all important	0%	15%	0%	9%	7%

Do you know what the cost is to your brand when a customer has a bad experience?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes	30%	15%	18%	20%	44%
No	70%	85%	82%	80%	56%

What lift would you expect if you had an integrated omnichannel marketing strategy?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
1% to 5%	13%	5%	9%	9%	13%
6% to 10%	36%	40%	18%	18%	27%
11% to 15%	23%	25%	27%	27%	33%
16% to 20%	6%	5%	0%	9%	7%
Over 21%	0%	5%	0%	18%	0%
I don't know	23%	20%	46%	18%	20%

What are your organization's top consumer data and predictive analytics technology strategies and priorities? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Be omnichannel; not channel dependent for all marketing, audience targeting, consumer engagement and customer loyalty initiatives	39%	40%	55%	70%	63%
Synchronize the consumer experience when engaging with your brand via multiple channels simultaneously	48%	50%	55%	40%	63%
Create a 360 degree, single view of the customer or prospect across the enterprise	48%	30%	55%	70%	63%
Action on real-time consumer intelligence at the point of contact	29%	30%	46%	30%	44%
Consistently deliver more personalized and satisfying customer experiences	61%	50%	46%	60%	44%
Instantly and accurately identify customers across channels to enhance customer loyalty program reach and exposure	32%	25%	18%	40%	50%
Improve marketing campaign measurement by tracking influenced sales across channels	45%	30%	36%	50%	38%
Predictive lead conversion and profitability analysis	29%	30%	36%	40%	50%
Increase conversion rates and customer acquisition	65%	60%	36%	40%	44%
Increase cross-selling, up-selling and retention	42%	60%	55%	50%	38%
Other	0%	0%	0%	0%	0%

What are the biggest challenges and "pain points" related to consumer data and predictive analytics? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Cost	58%	75%	46%	64%	56%
Time required to learn and use the platforms	32%	30%	46%	36%	38%
Lack of staff with analytical experience and knowledge to use effectively	58%	45%	55%	18%	50%
Overcoming IT integration issues and data silos	68%	35%	36%	46%	56%
Analyzing and implementing the data effectively	36%	25%	27%	18%	38%
Getting agreement from key players	13%	20%	9%	9%	38%
Communicating the value and need to senior management	13%	10%	18%	55%	19%
Integrating with other marketing and media campaigns and efforts	26%	20%	18%	27%	31%
Inability to action on this information in real time, at the point of contact	23%	5%	27%	36%	31%
Inability to consistently leverage this information across multiple channels	16%	10%	27%	36%	25%
Privacy issues	3%	10%	18%	18%	13%
Other	3%	0%	0%	0%	6%

What are the most important consumer data analytics technology and services trends impacting your organization? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Senior executive management interest in this area	26%	15%	18%	27%	53%
Proliferation of available data sources, providers and platforms	48%	20%	55%	46%	40%
Competitor use of these technologies and platforms	16%	25%	18%	27%	40%
Integration with other data, media and marketing programs and efforts	61%	35%	56%	36%	47%
Need to analyze internal data to uncover actionable consumer insights	38%	40%	73%	55%	53%
Need to integrate external demographic, psychographic and propensity data to gain deeper consumer insights	36%	35%	9%	55%	47%
Other	0%	0%	0%	0%	0%

How does senior management at your organization view the role of consumer data analytics technology, usage and services?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Very important, critical	13%	21%	9%	36%	50%
Important	58%	32%	64%	18%	50%
Somewhat important	19%	32%	9%	36%	0%
Not very important	7%	5%	18%	0%	0%
Not at all important	3%	11%	0%	9%	0%

What consumer insights would you most benefit from accessing in real time, at the point of interaction? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Purchase history	45%	45%	46%	46%	93%
Profitability and lifetime value	55%	40%	46%	46%	60%
Requests and communications	36%	35%	55%	36%	47%
Demographic data	26%	35%	46%	46%	80%
Psychographic and lifestyle data	32%	30%	46%	46%	47%
Purchase propensities and buying behaviors	65%	60%	64%	73%	73%
Geographic home location	23%	10%	36%	9%	40%
Other	0%	0%	0%	0%	7%

Which of the following customer touch points are considered to be very important / critical to your organization? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Website	97%	65%	73%	82%	94%
Mobile	68%	50%	46%	46%	81%
Online Advertising	45%	25%	36%	46%	69%
Landing Pages	55%	40%	46%	36%	50%
Search Engines	65%	55%	46%	55%	88%
Email	87%	55%	55%	55%	69%
Social Media	61%	55%	46%	46%	56%
TV	13%	15%	27%	27%	44%
Radio	10%	20%	9%	18%	31%
Print	36%	25%	27%	36%	56%
Call Center/IVR	48%	30%	46%	9%	50%
Direct Mail	45%	35%	55%	27%	44%
Retail Store/Branch	26%	30%	18%	46%	38%
Outdoor Advertising	0%	5%	18%	0%	19%

At which touch points would you gain the most benefit from accessing additional customer and prospect demographic, psychographic and behavioral insights?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Website	94%	50%	70%	82%	63%
Mobile	48%	35%	20%	55%	69%
Online Advertising	26%	5%	30%	36%	56%
Landing Pages	32%	45%	40%	0%	19%
Search Engines	32%	10%	50%	36%	50%
Email	48%	35%	30%	36%	44%
Social Media	32%	25%	40%	55%	31%
TV	7%	15%	20%	27%	25%
Radio	0%	5%	10%	0%	25%
Print	7%	5%	20%	0%	31%
Call Center/IVR	26%	25%	30%	18%	19%
Direct Mail	29%	20%	20%	9%	25%
Retail Store/Branch	16%	15%	10%	27%	19%
Outdoor Advertising	0%	5%	10%	0%	6%

What are the main consumer data identifiers or contact points that you typically use to identify and then score, segment or match back to your CRM? (Please check all that apply.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Mobile phone number	26%	35%	50%	55%	47%
Online cookie	36%	35%	50%	36%	60%
Landline phone number	26%	25%	30%	9%	53%
Home address	36%	45%	50%	36%	53%
Email address	77%	70%	50%	64%	87%
IP address	26%	15%	30%	46%	47%
None	7%	10%	0%	18%	0%
Other	3%	5%	20%	0%	0%

How important is the ability to link all key customer and prospect identifiers or contact points together to correctly and consistently identify consumers across channels (phone, email, address, cookies)?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Very important, critical	23%	22%	22%	64%	60%
Important	47%	44%	33%	27%	33%
Somewhat important	20%	28%	33%	0%	0%
Not very important	10%	6%	11%	0%	0%
Not at all important	0%	0%	0%	9%	7%

Do you currently use internal/CRM or 3rd party data to create custom website experiences for each visitor?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes, both internal/CRM and 3rd party data	29%	15%	50%	50%	40%
Yes, internal/CRM only	26%	25%	10%	10%	27%
Yes, 3rd party data only	3%	15%	0%	0%	7%
No	42%	40%	40%	30%	27%
I don't know	0%	5%	0%	10%	0%

Does your website deliver customized creative, offers or messaging for each visitor?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes, for both authenticated and anonymous site visitors	16%	10%	20%	27%	13%
Yes, but only for authenticated site visitors	13%	10%	30%	27%	38%
No, but we have plans to implement this technology in the next 6 months	36%	40%	20%	0%	38%
No, and we do not have any plans to implement	32%	30%	30%	46%	6%
I don't know	3%	10%	0%	0%	6%

How important is accurately measuring the impact of your marketing on sales across channels?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Very important, critical	32%	37%	30%	50%	63%
Important	52%	37%	50%	40%	25%
Somewhat important	13%	16%	0%	0%	6%
Not very important	3%	11%	20%	0%	6%
Not at all important	0%	0%	0%	10%	0%

Are you able to track offline sales (via the call center or physical store locations) that are directly impacted by online advertising?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
We cannot track these offline conversions today, but we would benefit from optimizing our campaigns with these insights	42%	61%	20%	80%	63%
We cannot track these offline conversions today and do not have a business need for this tracking	36%	33%	30%	10%	25%
Yes, we do track these offline conversions	23%	6%	50%	10%	13%

What is the cost to your business of not being able to accurately measure cross-channel campaign performance and lacking these insights to optimize campaigns?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Less than $50,000	13%	10%	0%	0%	0%
$50,001 to $100,000	10%	20%	10%	0%	0%
$100,001 to $250,000	7%	15%	0%	9%	6%
$250,001 to $500,000	7%	15%	20%	9%	13%
$500,001 to $1,000,000	10%	5%	0%	9%	6%
Over $1,000,001	10%	0%	10%	36%	25%
I don't know	45%	35%	60%	36%	50%

Does your organization's employee compensation strategy encourage sales via any channel?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Sales reps are incentivized and compensated for driving sales across all channels	85%	25%	78%	78%	81%
Sales reps are discouraged from losing a sale from one channel to another channel	15%	75%	22%	22%	19%

What is your customer loyalty program strategy as it pertains to targeting and engagement across channels?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
We have an omnichannel customer loyalty program that precisely targets and accurately identifies customers, and synchronizes cross-channel engagement	13%	15%	20%	27%	25%
We have a robust customer loyalty program that targets customers via specific channels, but is not synchronized for cross-channel engagement	16%	10%	20%	18%	31%
We have a small customer loyalty program that targets customers via specific channels, but is not synchronized for cross-channel engagement	23%	35%	20%	36%	19%
We do not have a customer loyalty program because it is not a priority	48%	40%	40%	18%	25%

Do you leverage offline CRM and conversion data to better understand your online target audience to proactively continue the conversation with your customers in a relevant way?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes	19%	32%	44%	36%	38%
No, but we would like to do this	65%	47%	33%	55%	56%
No, there is no business need	16%	21%	22%	9%	6%

Do you leverage online interaction and conversion data to better understand your offline target audience to proactively continue the conversation with your customers in a relevant way?

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Yes	19%	26%	40%	27%	38%
No, but we would like to do this	74%	42%	40%	64%	56%
No, there is no business need	7%	32%	20%	9%	6%

Which of the following best describes your organization's primary industry?

(Please choose one.)

	$1m to $5m	$5m to $10m	$10m to $25m	$25m to $50m	Over $50m
Retail	26%	25%	27%	18%	44%
Financial Services & Insurance	13%	0%	9%	0%	19%
Information Technology	10%	15%	18%	0%	13%
Telecommunications	0%	5%	0%	0%	0%
Automotive	3%	5%	9%	0%	6%
Consumer Electronics	0%	0%	0%	0%	0%
Consumer Products	23%	20%	18%	46%	0%
Healthcare & Pharmaceutical	0%	5%	9%	0%	0%
Media	0%	5%	0%	18%	0%
Education	7%	0%	9%	0%	0%
Travel & Hospitality	3%	15%	0%	0%	0%
Other	16%	5%	0%	18%	19%

Methodology & About the Respondents

Between July and September 2013, *Multichannel Merchant* fielded a survey to leading marketing executives and managers in various key industry categories. A total of 351 responded to the survey, representing a cross-section of the marketing industry with a focus on retailers as well as companies in a number of key industry sectors.

About the Respondents

Industry Sector

	All Respondents
Retail	21%
Consumer Products	11%
Information Technology	7%
Financial Services & Insurance	7%
Media	7%
Healthcare & Pharmaceutical	6%
Travel & Hospitality	5%
Education	4%
Automotive	2%
Consumer Electronics	1%
Telecommunications	1%
Other	28%

Job Title

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Chairman / CEO / President	23%	25%	6%	17%	27%	47%	21%	23%
CMO / Chief Marketing Officer	5%	8%	6%	6%	8%	0%	0%	0%
CIO	0%	0%	0%	0%	0%	0%	7%	0%
Vice President, Marketing (including EVP, SVP)	10%	4%	19%	6%	15%	6%	14%	0%
Other Senior Executive — Non-Marketing	7%	6%	6%	6%	4%	6%	0%	46%
Director of Marketing	12%	10%	13%	17%	19%	12%	21%	8%
Marketing Manager	9%	8%	13%	11%	4%	0%	7%	0%
Data Analyst	3%	0%	13%	6%	0%	0%	0%	8%
Database Director / Manager	0%	0%	6%	0%	0%	0%	0%	0%
Circulation Director / Manager	0%	0%	0%	0%	0%	0%	0%	0%
Catalog Director / Manager	1%	2%	0%	6%	0%	0%	0%	0%
IT Director / Manager	2%	4%	0%	0%	0%	6%	0%	0%
Ecommerce Director / Manager	3%	10%	0%	0%	8%	0%	0%	0%
Online Marketing Director / Manager	1%	0%	6%	0%	0%	6%	0%	0%
Marketing Communications Director / Manager	4%	6%	13%	0%	0%	12%	7%	0%
Product Director / Manager	5%	4%	0%	11%	8%	0%	14%	8%
Sales Director / Manager	5%	8%	0%	6%	0%	0%	7%	8%
Other	9%	8%	0%	11%	7%	6%	0%	0%

Overall Marketing Budget in 2013

	All Respondents	Retail	Financial	IT	Consumer Products	Media	Healthcare	Travel
Under $500,000	51%	41%	29%	28%	27%	77%	69%	62%
$500,001 to $1,000,000	11%	8%	24%	17%	4%	6%	15%	8%
$1,000,001 to $5,000,000	13%	16%	24%	17%	27%	0%	0%	8%
$5,000,001 to $10,000,000	9%	10%	0%	17%	15%	6%	8%	23%
$10,000,001 to $25,000,000	5%	6%	6%	11%	8%	0%	8%	0%
$25,000,001 to $50,000,000	5%	4%	0%	0%	19%	12%	0%	0%
Over $50,000,000	7%	14%	18%	11%	0%	0%	0%	0%

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