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GROUP

STATE OF MARKETING 2019-2020

KEY TRENDS AND MAJOR PRIORITIES

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CONTENTS

List of Figures	2
Introduction	3
Key Trends and Major Priorities Heading Towards 2020	4
What Marketing Formats Are Rising and Falling?	4
Priorities for Marketers in 2020	12
What to Look Out for in 2020	14
Methodology	18
References	19

LIST OF FIGURES

Figure 1: Are You Increasing, Decreasing or Maintaining the Same Level of Usage Within the Following Marketing Formats?	5
Figure 2: Increasing and Decreasing Marketing Formats in North America	7
Figure 3: Increasing and Decreasing Marketing Formats in Europe	7
Figure 4: Increasing and Decreasing Marketing Formats in Asia-Pacific	8
Figure 5: Increasing and Decreasing Marketing Formats by Organization Type	10
Figure 6: Which Channels Are Your Largest Sources of B2B Leads?	11
Figure 7: Key Priorities for Marketing Departments in the Next 12 Months	12
Figure 8: Key Priorities for Marketing Departments in the Next 12 Months by Region	13
Figure 9: Key Priorities for Marketing Departments in the Next 12 Months by Organization Type	14
Figure 10: Which of the Following Will Be Most Talked About by Marketers In 2020?	15
Figure 11: Marketers Currently Using AI or Planning to Use AI	16
Figure 12: Transparency, Privacy and Trust Considered Less Important in Asia-Pacific	17

INTRODUCTION

In 2019 marketers are looking to tell coherent stories about their brands, as the sector shifts towards focusing on quality over output. This is borne out across a number of results from our survey. Content marketing and blogs are surging as brands look to tell narratives about themselves and our respondents told us that building brand awareness and storytelling was their top priority looking towards 2020. Meanwhile, paid social and search advertising forms are not seen as important as organic social and Search Engine Optimization (SEO), and display advertising is barely increasing in terms of usage.

It would seem that a shift is ongoing, following changing patterns of interest and consumption of marketing material, as generational change occurs. Consumers increasingly want brands to have values and express that through their decision-making, products and advertising. Those consumers are also increasingly savvy and becoming less likely to be drawn in by simple clickbait.

They are also more aware of their privacy in the wake of numerous major stories resulting from scandals, most notably revelations surrounding Facebook, and more empowered to take control following the institution of GDPR regulations.

These trends mean that marketers need to produce compelling copy that increasingly breaches the barriers consumers put up and tells them stories that chime with their values and interests.

Although brands are alive to this and shifting to more appropriate content forms, there still appears to be a gap in terms of underlying capabilities. Brands need to do more with supporting systems and also to invest in data gathering and interpretation to understand the profiles of their customers and serve them the right content to drive engagement.

Despite content marketing being the fastest growing marketing form, just 53% of respondents said that they had deployed, or were about to deploy a content management platform in the next 12 months. Although marketers said their second-highest priority is understanding customer data and journey mapping, just 30.6% said they have a customer data platform. Finally, marketing automation is the top investment priority and is expected to be highly talked about in 2020 but a mere 41.4% have, or expect to have in the next year, a marketing automation platform.

Similarly, data capabilities for marketers will need to progress to support these objectives. On average, marketers report that they use just 11 data sources to understand and target customers and frequently that data is not made widely available within organizations. For example, when it comes to third-party data, which is increasingly critical for profiling and targeting, two thirds of our respondents reported limited or no integration of data from these sources.

The state of marketing in 2019-2020 is therefore in flux, with marketers playing catch-up to match changing consumer expectations and become empowered in an age of fast-moving digital advertising that is highly reliant on data.

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KEY TRENDS AND MAJOR PRIORITIES HEADING TOWARDS 2020

Where are consumers putting their attention and how do we get a coherent story about our brand across to them? This appears to be the big question on marketers' minds as we head towards 2020. We can see this in the priorities they reported to us and the marketing formats they are focusing on. Our respondents feel that brand storytelling and building brand awareness are their top priorities in the coming year. There is rapidly increasing usage and investment into content, social and search marketing in order to get through to consumers increasingly inured to a variety of saturated marketing formats and falling back on sources they feel they can trust. They increasingly want brands to say something genuine that chimes with their values and marketers are responding accordingly, looking to give them content through blogs, imagery, videos and articles that will give social and search visibility, as well as credibility.

Although marketers are thinking hard about increasing the human touch with marketing that connects with a target market's values and emotions, they are also alive to the winds of technological change to help them spread their messages. By far, our respondents thought that the topics which will be spoken about most by marketers in 2020 will be automation, artificial intelligence, and machine learning. If marketers are to cut through the noise and deliver content that genuinely speaks to consumers, then this will have to require a degree of automation and artificial intelligence.

The gains from machine learning and automation are most likely to be in the second most important priority among marketers in 2019 – understanding customer data and journey mapping. Mostly, marketers have historically guessed at what might resonate with consumers and why for content marketing, with only rough data trends as guidelines. Machine learning promises a step change in capabilities, allowing brands to analyze the performance of their content in detail, compare it to others, suggest topics to particular audiences and optimize it for search performance. Smarter automation means that this content can be cut and shaped more effectively for different mediums and distributed far more efficiently.

Marketers therefore should be excited about the possibilities emerging across 2019 and 2020 but they will also need to work hard to gain trust from consumers and become a brand that they see in a positive light from their value perspective.

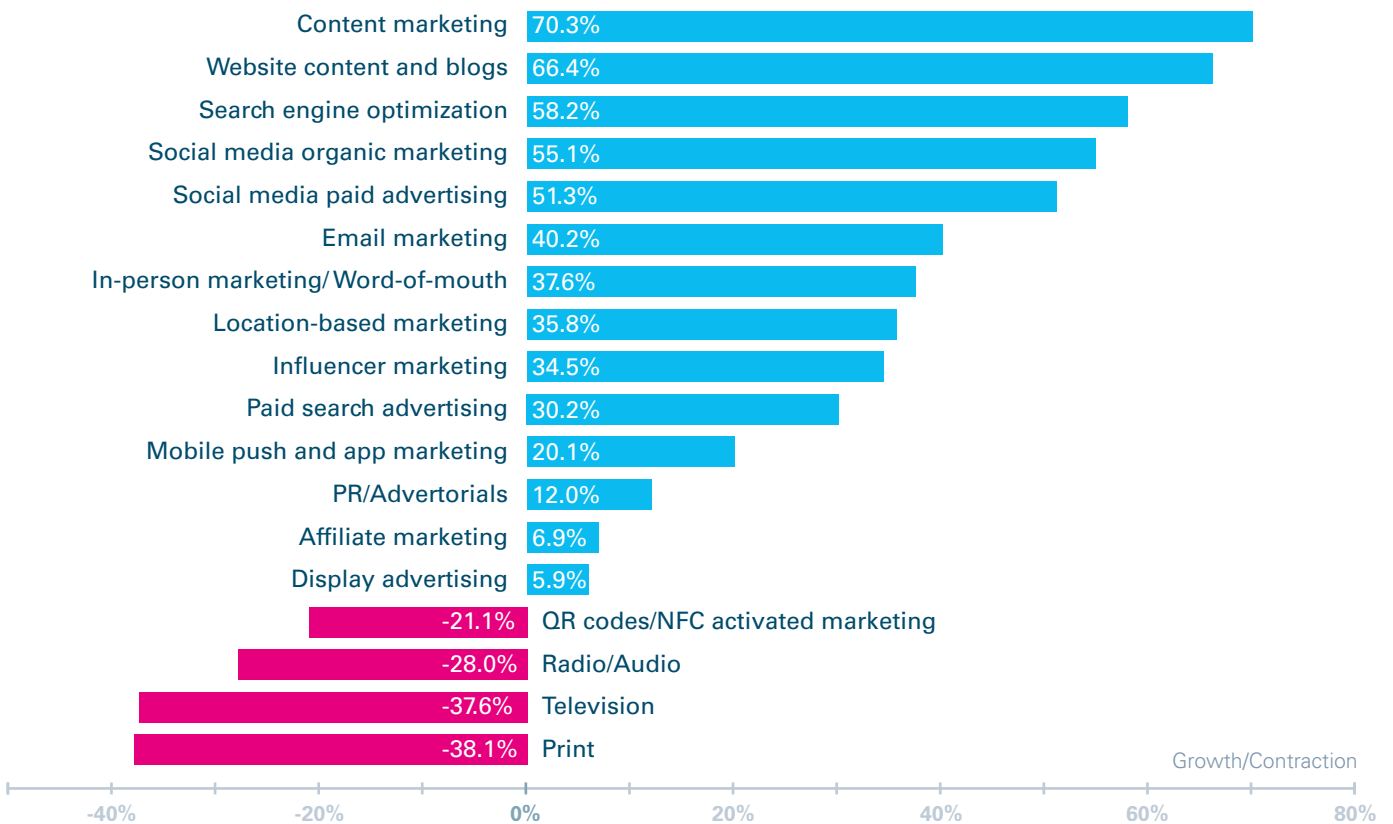
What Marketing Formats Are Rising and Falling?

In order to find out what marketing formats are on the rise and which are in freefall, we asked respondents whether they were increasing, decreasing or maintaining the same level of usage in a wide variety of marketing formats. Through this we were able to make a balance of growth and contraction in marketing formats by subtracting those reporting decreasing usage from those reporting increasing usage.

The results show a trend for increasing usage of earned media formats, with content marketing king. There are also clear trends in the rise of social media marketing continuing unabated, search engine marketing remaining critical and the rapid decline of traditional marketing formats showing no signs of stopping.

Both content marketing and website content and blogs were very high growth areas, with the former having a positive growth balance of 70.3% and the latter of 66.4%. Just 2% of respondents said that they are looking to decrease their usage of content marketing and 3.2% said the same for website content and blogs. This demonstrated enormous belief among marketers that these areas are absolutely critical to marketing performance both now and in the near future.

Figure 1: Are You Increasing, Decreasing or Maintaining the Same Level of Usage Within the Following Marketing Formats?



Source: *The State of Marketing 2019*

The next-fastest growing marketing formats are search and social, although with earned forms expanding faster in terms of usage than paid media in both. This is most pronounced in search, where SEO has a positive growth rate of 58.2% but paid search advertising is growing in usage by 30.2%: a 28 point difference. Social media saw a much smaller difference between organic/earned and paid marketing, with a positive rate of 55.1% for organic social marketing and 51.3% for paid, which although a relatively small difference between the two, still bodes well for the wallets of the social media giants, particularly Facebook.

Overlapping with social media are word-of-mouth marketing and influencer marketing, which are most effective for marketers on social platforms. Both have high growth rates, with 43.8% saying that they will be increasing usage of the former, against just 6.2% who said they will be decreasing usage. For influencer marketing 46% said they expect usage to increase, opposed to 11.6% who said that they will be decreasing usage.

Other strong growth areas are email marketing (+40.2%) and location-based marketing (+3.8%).

It seems from these trends that the institution of GDPR and changing consumer behaviours are prompting marketers to place more emphasis on digital channels that reach the customer directly from a position of trust and authority.

Highly rated search results, brand social posts, blogs, articles, and sharing by both macro- and micro-influencers are all areas of strong growth for marketers. However, paid marketing formats that consumers increasingly view warily and which are harder to impart a brand’s values through are faring far less well, as can be seen in the relatively low growth rates for usage of mobile app and push marketing (+20.1%), affiliate marketing (+6.9%), and display advertising (+5.9%)

It appears there is recognition that target markets are more aware of marketing tactics and customers in those markets are looking for trustworthiness alongside brand values that chime with their own in both brand operations and the marketing they present.

There is a plethora of evidence among consumer research to support this, with marketers seeming to be reactive rather than proactive and changing behind market trends, as these trends have been in evidence for some time. Banner blindness, ad blocking software and low display ad clickthrough have been known factors for some time, with ad blocking software predicted to be used by 22.9% of UK internet users, a third of German netizens and around a quarter of those in the US in 2019 (eMarketer, 2018; Campaign, 2018).

More fundamental, however, is the changing way consumers feel about brands and their relationships with brands, particularly among younger demographic cohorts. The depth of research makes this fairly conclusive at this stage. A 2018 Accenture survey of nearly 30,000 consumers found that two thirds of consumers choose between similar brands based on supply chain transparency and a perceived good culture, with more than 60% also saying employee welfare, environmental care and ethical values are also important (Accenture, 2018).

Edelman's 2018 Earned Brand survey, which asked 8,000 people across eight markets about brand perception, found that 64% of consumers around the world will buy or boycott a brand solely because of its position on a social or political issue, a major jump of 13 points from previous year's results. The research found that so-called 'belief-driven buyers' are now the majority across markets, including the US (59%, up 12 points), Japan (60%, up 21), the UK (57%, up 20) and Germany (54%, up 17). They also found that younger groups were more likely to feel this way, with 69% of 18 to 34-year olds being belief-driven, 67% of 35-54 year olds but falling to 56% of those over 55 (Edelman, 2018).

Another survey conducted by Euclid in 2018 also found an age component: 52% of Millennials and 48% of Gen Xers felt that it was important that their values align with their favourite brands but just 35% of Baby Boomers agreed with the same statement (Euclid, 2018).

The results therefore seem pretty conclusive. Consumers are changing and the marketing tactics that the sector is focusing on finally reflect that shift. Marketers are putting more time and effort into formats that will speak more directly and more in tune with their audiences and potential customers.

The other obvious major trend is the precipitous decline of all traditional media formats. Television, print, and radio and audio all saw contraction in usage in our survey, which is hardly new but emphasizes that we have not yet reached the bottom of the trough, especially as there is still around a fifth of marketing budgets allocated to these formats according to our results. Traditional media businesses will need to steel themselves for further losses to the digital space.

Breaking areas of growth and contraction down geographically reveals there are some substantive differences in strategies and priorities between the different regions.

Although content marketing, websites and blogs are the top two growth areas in all regions, North America appears to be invested into paid marketing formats, whereas respondents from Asia-Pacific are more focused on using the prevalent ecosystems of the region to their advantage, with social-related marketing growing at a faster rate, QR codes more popular, and lower barriers for data privacy allowing more focus on areas such as location-based and NFC marketing.

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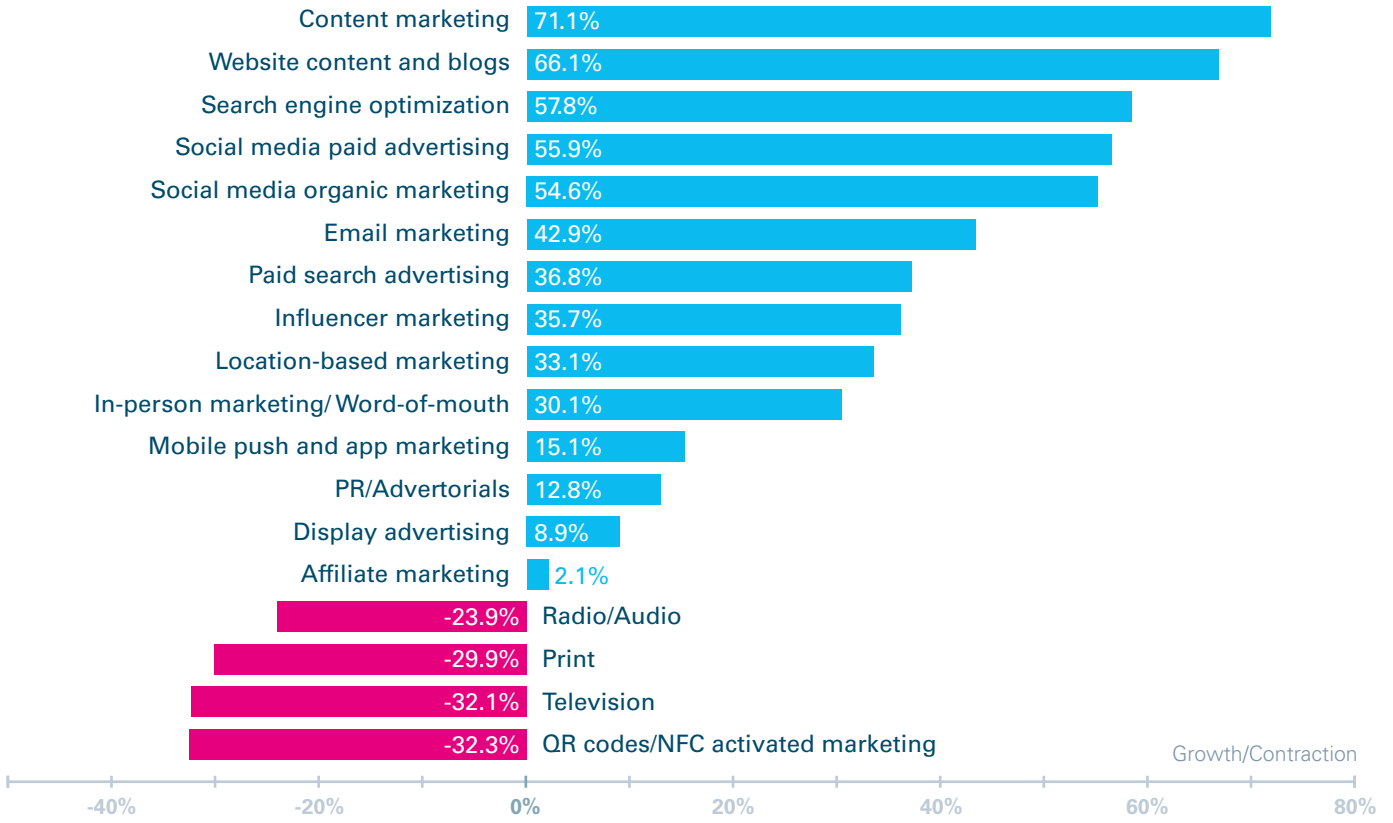
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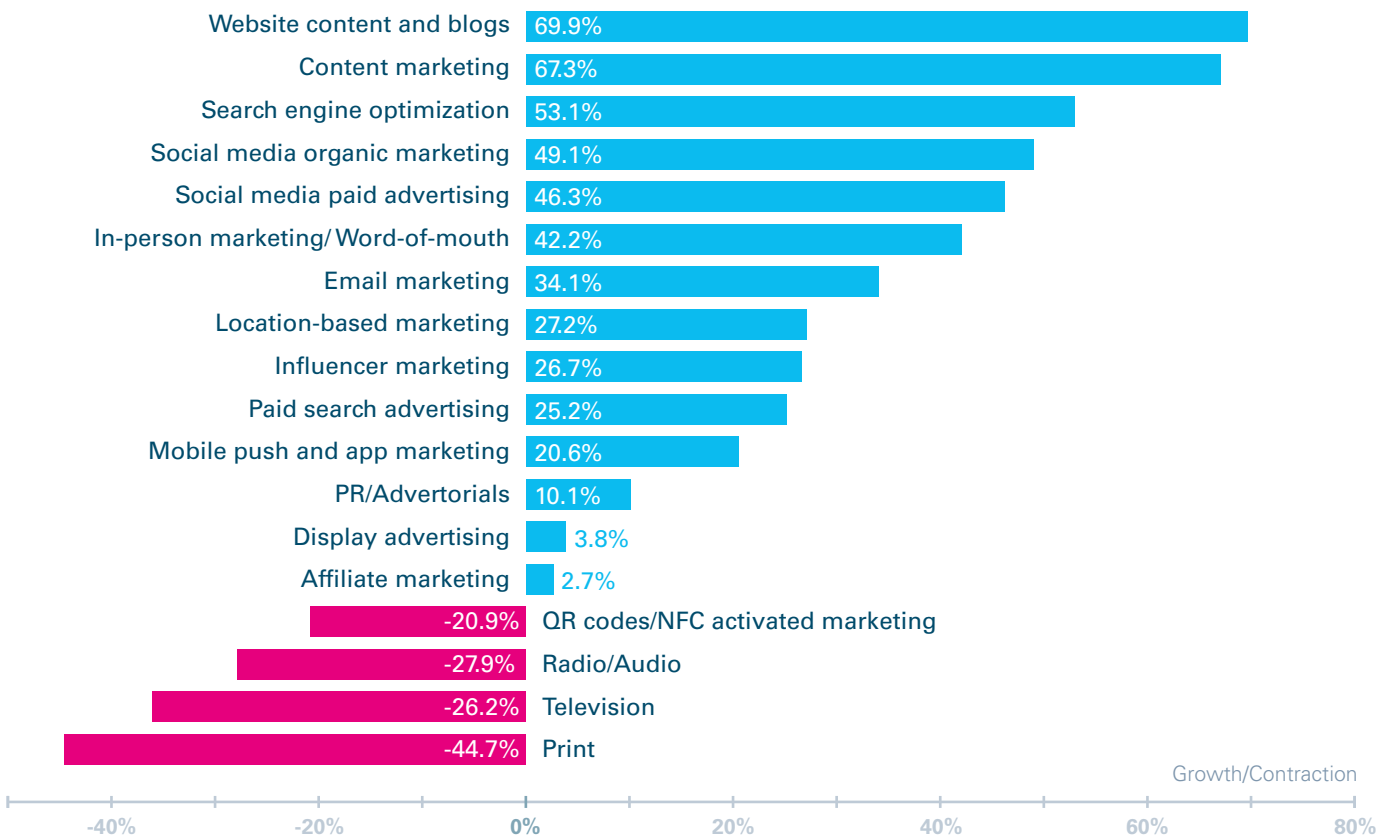
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Figure 2: Increasing and Decreasing Marketing Formats in North America



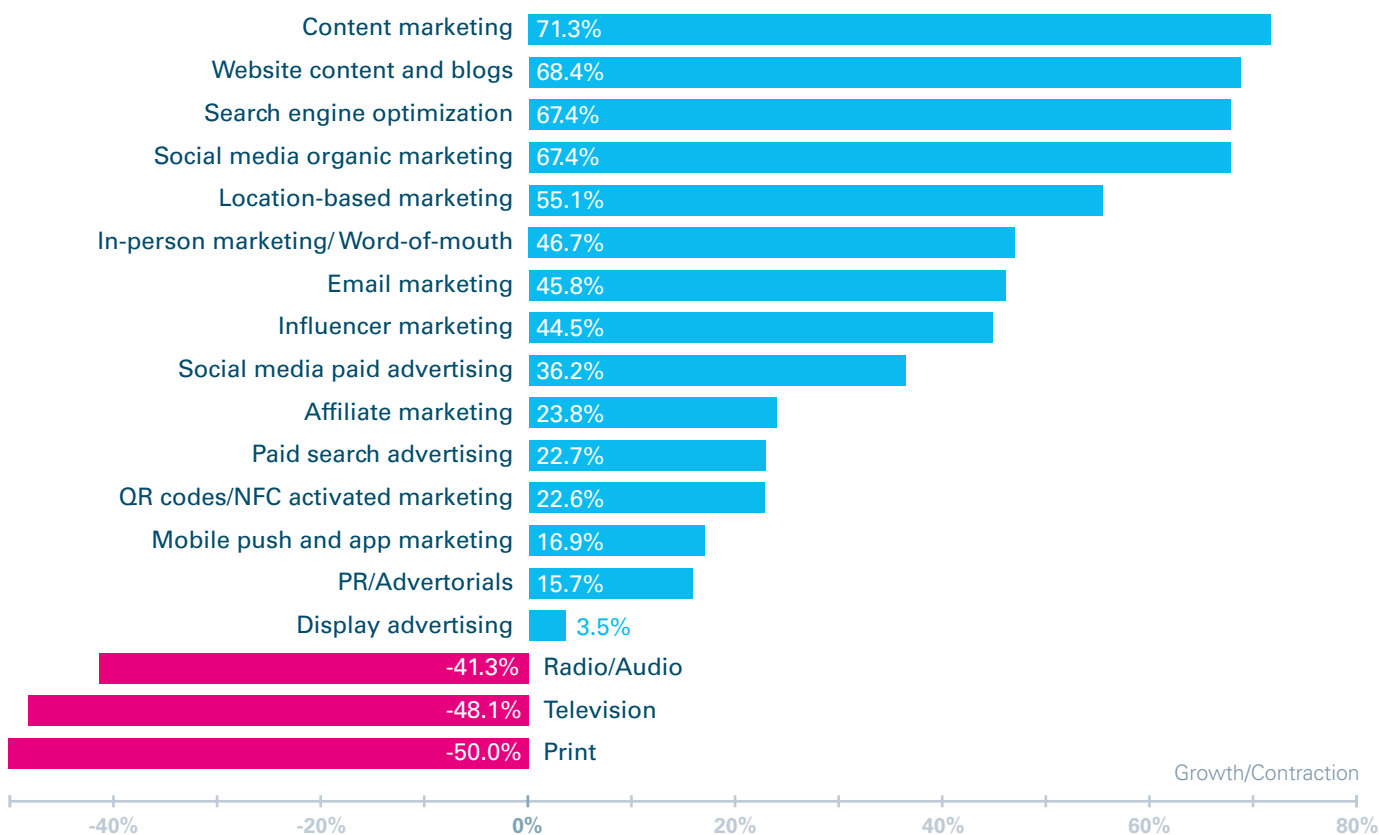
Source: The State of Marketing 2019

Figure 3: Increasing and Decreasing Marketing Formats in Europe



Source: The State of Marketing 2019

Figure 4: Increasing and Decreasing Marketing Formats in Asia-Pacific



Source: The State of Marketing 2019

Table 1: Increasing and Decreasing Marketing Formats by Region

	North America	Europe	Asia-Pacific
Content marketing	71.1%	67.3%	71.3%
Website content and blogs	66.1%	69.9%	68.4%
Search engine optimization	57.8%	53.1%	67.4%
Social media paid advertising	55.9%	46.3%	36.2%
Social media organic marketing	54.6%	49.1%	67.4%
Email marketing	42.9%	34.1%	45.8%
Paid search advertising	36.8%	25.2%	22.7%
Influencer marketing	35.7%	26.7%	44.5%
Location-based marketing	33.1%	27.2%	55.1%
In-person marketing/ Word-of-mouth	30.1%	42.2%	46.7%
Mobile push and app marketing	15.1%	20.6%	16.9%
PR/Advertorials	12.8%	10.1%	15.7%
Display advertising	8.9%	3.8%	3.5%
Affiliate marketing	2.1%	2.7%	23.8%
Radio/Audio	-23.9%	-27.9%	-50.0%
Print	-29.9%	-44.7%	-41.3%
Television	-32.1%	-36.2%	-48.1%
QR codes/NFC activated marketing	-32.3%	-20.9%	22.6%

Source: The State of Marketing 2019

North American marketers were noticeably keener across a variety of paid media formats, with positive growth rates for social media paid advertising being 55.9% in the region, compared to 46.3% in Europe and 36.2% in Asia-Pacific. A similar story occurs in paid search advertising, where North American respondents gave a growth rating of 36.8%, compared to 25.2% and 22.7% for Europe and Asia-Pacific, respectively, and the pattern repeats in display advertising, with usage growth of 8.9%, 3.8% and 3.5% in North America, Europe and Asia-Pacific, respectively. This could be driven by bigger budgets in the US on average and also that the biggest winners of this ad dollar are home brands to North America, meaning more familiarity and market penetration for those companies. North American marketers also showed smaller declines in their usage of all traditional media formats.

Asia-Pacific, on the other hand, has a different landscape, with social platforms more prominent and often more integrated into and across the lives of its inhabitants. This drives a different dynamic borne out across our results, where social is more important in a variety of ways, particularly using prominent figures to push campaigns, and also in QR codes, which have yet to catch on in the West. Respondents in Asia-Pacific expected more usage growth in social media organic marketing, influencer marketing, in person/word-of-mouth marketing and affiliate marketing than those in Europe or North America. This is because consumers in Asia-Pacific are more likely to turn to social media both to research their products and also to buy them, especially in China, where there is a high degree of integration between social and e-commerce landscapes. This means social is more central and therefore more critical to penetrate, especially when something like WeChat can essentially act as a consumer's entire digital life. This means online influencers (or key opinion leaders as they are more frequently known in China) and affiliates have a lot of sway and are therefore more important to marketing campaigns in the region.

Emphasizing how different the landscape can be in Asia-Pacific, QR codes/NFC activated marketing is wildly different in expected usage when compared to Europe and North America. Both of the latter report decreasing usage, as this kind of interaction is rarely used by Western consumers, with declines of -32.3% expected in North America and -20.9% in Europe, with Europe's decline likely lower due to the higher number of Asian tourists to the region. In Asia-Pacific the contrast is stark, with a fifty point difference in between respondents from that region and those based in North America for usage of QR codes and NFC marketing at a positive growth rate of 22.6%.

Respective data governance and privacy policies in the different regions appear to be having an effect as well. Europe, where GDPR has been instituted and enforced, notably with fines for Marriott and British Airways that totalled nearly GBP300 million combined in 2019, shows a more cautious profile.

Europe came bottom for growth in several categories where personal or business data is considered more sensitive, whereas Asia-Pacific came top for usage growth in these fields, reflecting much lighter requirements for businesses to protect data. European respondents say that they expect lower growth in usage of social media organic marketing (49.1%), email marketing (42.9%) and location-based marketing (27.2%), compared to Asia-Pacific, which came top in all with positive scores of 67.4%, 45.8%, and 55.1%, respectively. This trend of more aggressiveness from respondents in Asia-Pacific in a variety of marketing fields as a result of lower data requirements repeats itself throughout our results.

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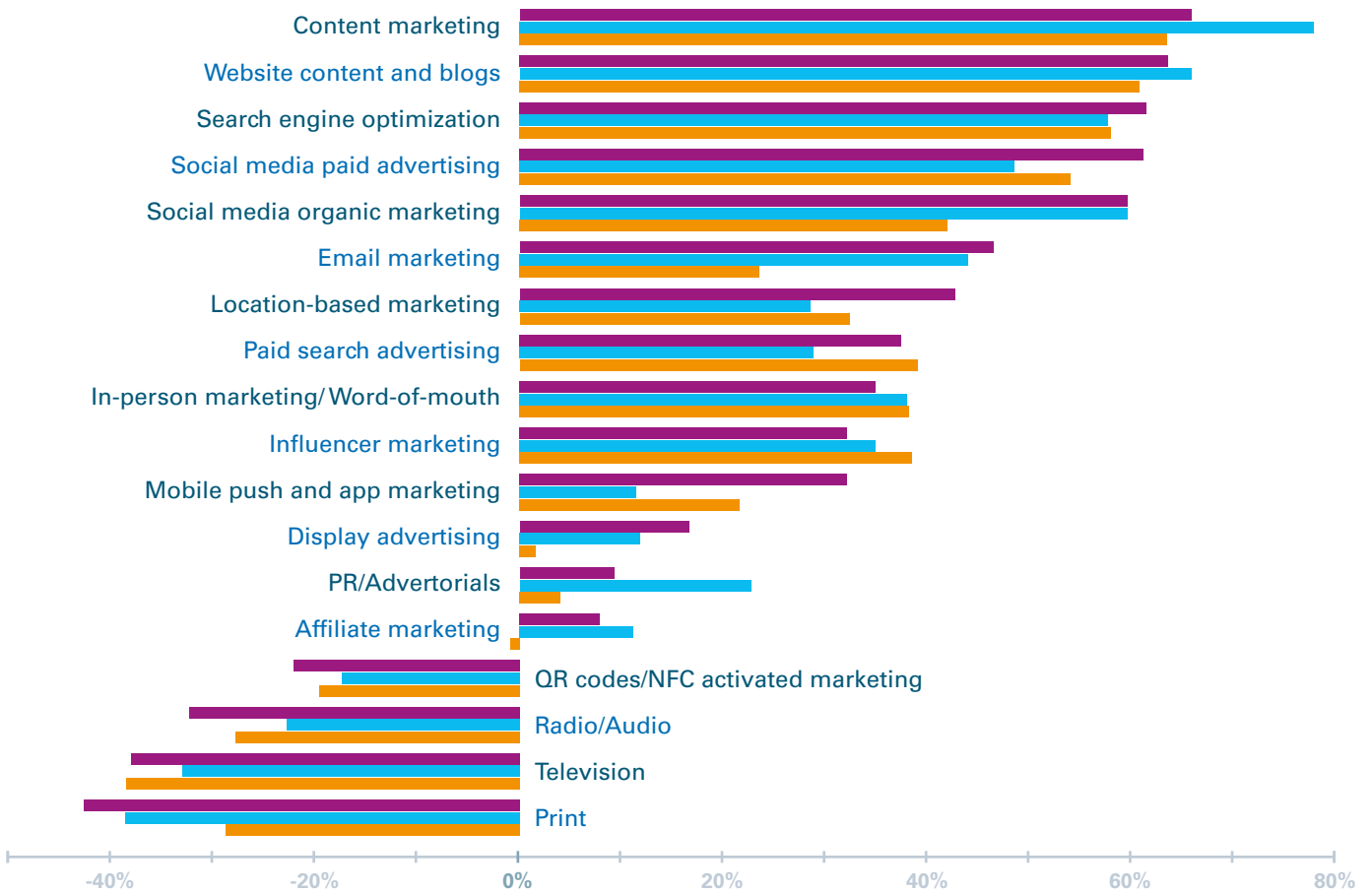
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Figure 5: Increasing and Decreasing Marketing Formats by Organization Type



Source: The State of Marketing 2019

Table 2: Increasing and Decreasing Marketing Formats by Organization Type

	B2C	B2B	Agency
Content marketing	66.2%	78.3%	63.8%
Website content and blogs	63.9%	74.2%	61.1%
Search engine optimization	61.8%	58.0%	58.3%
Social media paid advertising	61.5%	48.8%	54.3%
Social media organic marketing	59.9%	61.3%	42.2%
Email marketing	46.7%	44.2%	23.6%
Location-based marketing	42.9%	28.7%	32.5%
Paid search advertising	37.6%	29.0%	39.2%
In-person marketing/ Word-of-mouth	35.1%	38.2%	38.4%
Influencer marketing	32.3%	35.1%	38.7%
Mobile push and app marketing	32.3%	11.5%	21.7%
Display advertising	16.7%	11.9%	1.6%
PR/Advertorials	9.3%	22.8%	4.0%
Affiliate marketing	7.9%	11.2%	-0.9%
QR codes/NFC activated marketing	-22.3%	-17.5%	-19.8%
Radio/Audio	-32.6%	-23.0%	-28.0%
Television	-38.3%	-33.3%	-38.8%
Print	-43.0%	-38.9%	-29.0%

Source: The State of Marketing 2019

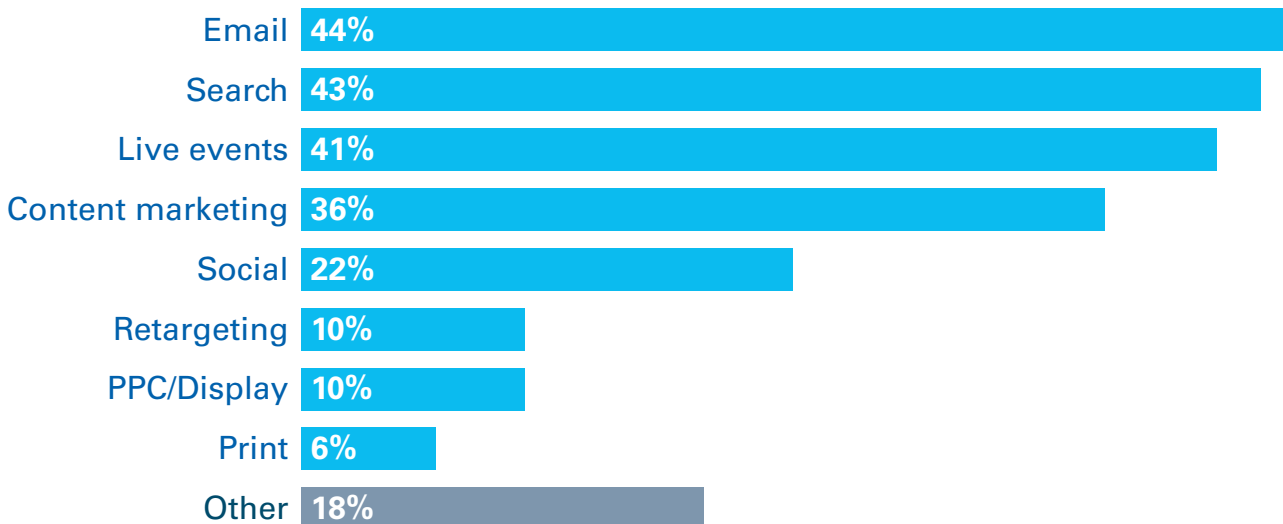
Separating results out by organizational type, there are obvious differences based on target audiences for marketing and how leads are generated for different business types. B2C brands are more focused on reaching consumers with timely messages through shorter forms of content, whereas B2B brands are more invested in longer-form content to try and drive sales leads that show genuine interest and can then be converted.

B2C brands led growth rates for social media paid advertising (61.5%), location-based marketing (42.9%), mobile push and app marketing (32.3%) and display advertising (16.7%). B2B brands on the other hand have the highest growth rates for content marketing (78.3%), websites and blogs (74.2%), social media organic (61.3%) and PR/advertorial marketing formats (22.8%).

This appears to mark a change in strategy for many B2B brands and a branching out in the search for new quality leads in the face of tighter data and privacy regulations. A 2019 survey found that B2B brands were still reliant on email, search and live events for the generation leads, with 44%, 43% and 41% of companies saying these were their largest sources of leads (see Figure 6; Chief Marketer, 2019). Content marketing was the fourth most important, with 36% saying it was key and just 22% said social was critical for lead generation. Looking at this alongside our dataset, it appears that harvesting new leads that generate strong returns is requiring B2B organizations to invest more into quality, long-form content and social to try and diversify their inbound marketing capabilities with a more organic mix and move away from list-buying and email marketing bombardment.

Marketing agencies have the lowest growth rates from email marketing (23.6%), display advertising (1.6%), affiliate marketing (-0.9%) and PR/advertorials (4%) but the highest rates for influencer marketing (38.7%) and paid search advertising growth (39.2%). As agencies work on behalf of brands, these differences are driven by their position, which may not have direct access to a brand's database but instead they are brought in to bring expertise to external marketing, particularly emerging or complex forms that brands may not have expertise themselves in handling, such as influencers.

Figure 6: Which Channels Are Your Largest Sources of B2B Leads?



Source: Chief Marketer, 2019

Priorities for Marketers in 2020

Reflecting the shifting trends in marketing formats, brands are focusing on understanding customers so that they can produce coherent narratives that appeal to them and deliver those to them on appropriate, high-yielding channels.

The top priority for brands in 2020 is building brand awareness and storytelling, which was chosen by 68.8% of our survey population. Although telling a strong and emotive story about your brand or products is a perennial concern for brands, as we noted above, this has become far more prominent issue in an age where consumers are more motivated by brand values and purpose.

The other main priorities are broadly about how to optimize and deliver these brand values and stories in an effective manner.

Understanding customer data and journey mapping, the second-highest priority and selected by 63.2% of respondents, is a key supporting element to driving brand awareness and Return on Investment (ROI) from any storytelling exercise. Brands need to know what messages will work at what stages and what will genuinely make an emotional connection with their consumers. In an age of vast data profusion, it is no wonder that this is a key priority as there are far more possibilities for accurate measurement, greater dispersal of content and better recommendation of content.

Exploring new channels and forms of content (52.5%), sales lead generation (50.4%) and growing organic reach (47.8%) are the other main priorities for our respondents and broadly fit around the idea of finding customers in their channels and communicating brand values in a way that converts. Channel exploration and growing organic reach, in particular, fit with the patterns we found in what marketing types are expanding, with paid channels not generating as much interest heading into 2020 and content marketing taking the lead. Similarly, paid advertising was rated as a key priority by just 27.5% of those surveyed.

Figure 7: Key Priorities for Marketing Departments in the Next 12 Months

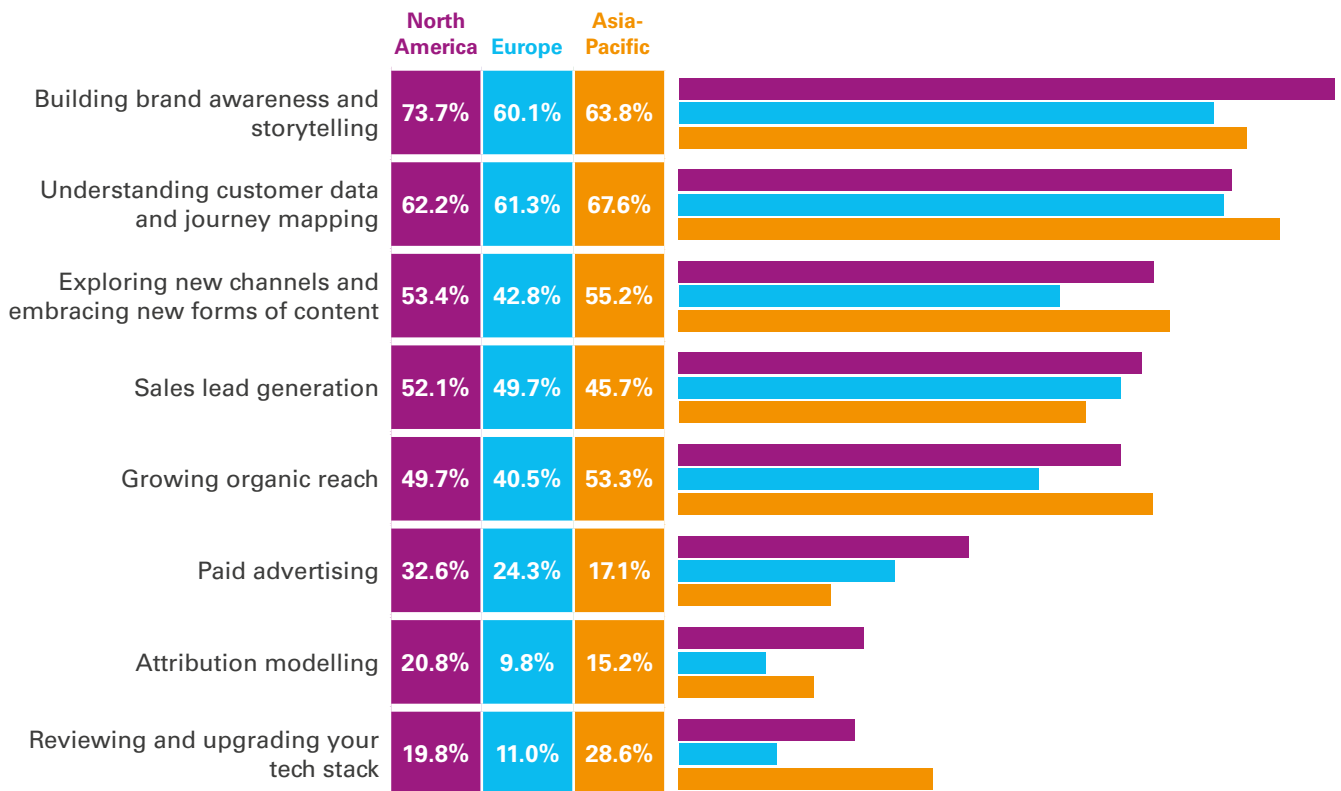


Source: *The State of Marketing 2019*

There is a broad continuation of the themes seen in figures 2, 3 and 4 when looking at priorities for 2020 by region of respondent. North American marketers were more focused on achieving clear results from their advertising dollars, with higher prioritization of sales lead generation (52.1%) and paid advertising (32.6%) than in Europe or Asia-Pacific. Respondents from Asia-Pacific were more focused on generating organic leads (53.3%) and were the least interested in paid advertising over the next 12 months. European respondents struck a more cautious note, as in Figure 3, with the lowest prioritization of growing organic reach (40.5%) and exploration of new channels and content types (42.8%).

Respondents in Asia-Pacific were also more focused on data and tech, with the highest rates for understanding customer data (67.6%) and reviewing and upgrading their techstack (28.6%).

Figure 8: Key Priorities for Marketing Departments in the Next 12 Months by Region



Source: The State of Marketing 2019

Looking at the organizational breakdown, B2C brands are more interested in connecting with, understanding and following their customers across the digital space, whereas B2B brands are more focused on lead generation. B2C brands were the most likely to say that they were focused on building brand awareness and storytelling (72.7%), growing organic reach (49.6%) and prioritizing attribution modelling (28.8%). B2B brands on the other hand are far more focused on sales lead generation, with 65.3% saying this is a priority, compared to 41.7% of B2B brands.

Regarding the role of agency brands in managing campaigns, they were most likely to say that they are prioritising paid advertising over the next year, at 36.5% of respondents from the sector, compared to 29.5% of B2C brands and 25.2% of B2B brands.

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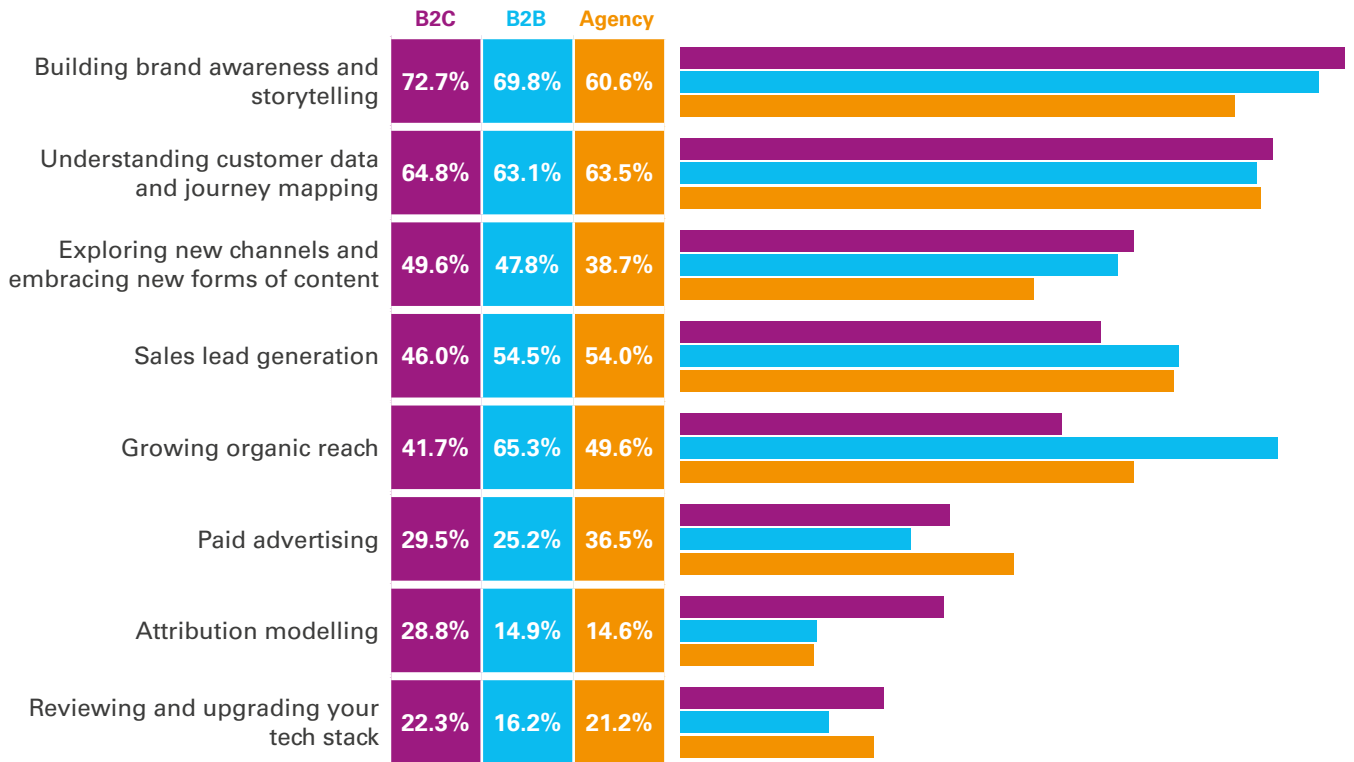
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Figure 9: Key Priorities for Marketing Departments in the Next 12 Months by Organization Type



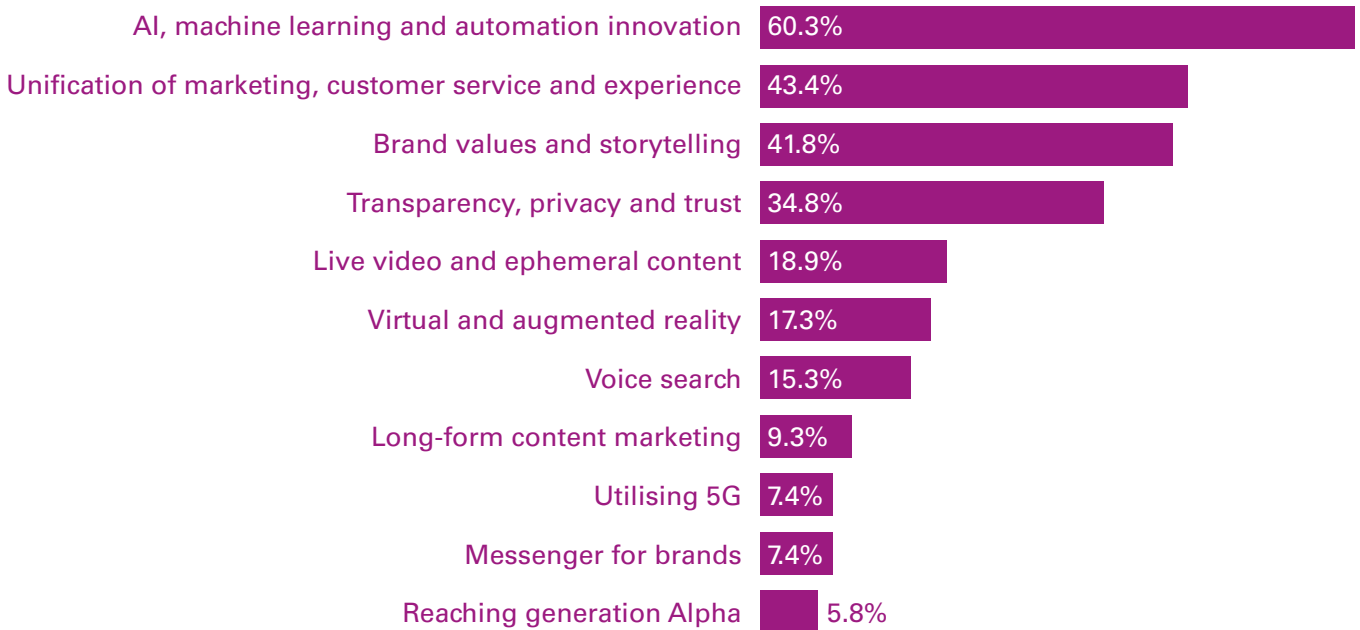
Source: *The State of Marketing 2019*

What to Look Out for in 2020

2020 is set to be a breakout year for AI, machine learning and automation according to our respondents. When we asked that will marketers be talking about in 2020, these areas were by far and away the most selected, with 60.3% selecting these as a key topic, compared to the next most popular, unification of marketing, customer service and experience, which was chosen by 43.4%.

The interest in the fields of AI, machine learning and automation is being driven by the acceleration of innovation and the potential it has to solve a wide variety of issues across the marketing space, from the most tedious and repetitive tasks to helping with the creative process.

At its most basic, the gains can be made immediately from automation, such as scheduling emails, publishing social media posts, triggering automated responses and retargeting to nurture leads. This is freeing up marketers' time to focus on more complex and creative tasks.

Figure 10: Which of the Following Will Be Most Talked About by Marketers In 2020?

Source: *The State of Marketing 2019*

The next stage is to dramatically expand marketers reach, both by way of broadening those reached by campaigns and also by increasing the accuracy of marketing delivered. Automation and machine learning can deliver programmatic marketing campaigns with a high number of small variations in copy to optimize engagement across a wide variety of platforms. It can vastly improve testing of marketing copy, taking the guesswork out of the process for marketers and making large-scale predictive content possible, such as through varying imagery or parts of the message for specific audiences.

As machine learning algorithms train on more data and become refined, the possibilities will continue to expand exponentially and we will see more complex decision-making capabilities become automated. This will bleed into the areas of content marketing and the creative we strongly associate with human intelligence.

Already we are on the cusp of this and marketers are looking closely at the possibilities. The Marketing Artificial Intelligence Institute asked over 200 marketers about where it would be most useful to automate a series of more than 60 common marketing use cases through AI and found that seven out of the top 10 use cases identified were for content marketing examples (Marketing Artificial Intelligence Institute , 2019).

Initially, machine learning is being applied in content marketing to help marketers know what content is succeeding, how they can optimize it for search visibility, and what they can focus on to drive engagement in future.

Increasingly, however, it can play a more sophisticated role through driving detailed personalization through content and product recommendations, taking this down to a hyper-personalised level. By looking at clusters of interests and how similar customers shop, AI can build detailed profiles, then recommend highly specific product sets. Including emerging areas, such as visual recognition categorization (for example of clothing styles), AIs can take their recommendation power even further, and dynamic pricing can create an additional boost by increasing the propensity to buy based on each customer segment's willingness to pay.

Despite these exciting emerging use cases, the majority of the sector is only just dipping its toes in the water. According to 2019 research by Salesforce marketers are still exploring and testing the waters when it come to AI, with much more potential yet to be unlocked. They found that just 22% of brands they surveyed to be currently using AI. However, a further 57% said that they plan to use the technology within the next two years, underlining the major growth that is coming down the pipeline.

With such a surprisingly low ratio of marketing companies currently using AI, it is clear that the major effects of AI within marketing are yet to come.

Maintaining models 

- Adapt in real time to a customer's profile on an individual level and meet their needs
- Simulate scenarios for testing purposes
- Check accuracy of predictions against real world results and adjust at regular intervals
- Seek new data sources and leverage unstructured data, such as NLP and social listening
- Retarget lapsed customers
- Identify signs of customer attrition

Predictions and personalization 


- Use planning and scheduling software to automate outbound marketing in conjunction with personalization
- Use segmentation and analytics findings to deploy personalized, dynamic content and offers
- Deploy predictive analytics
- Use propensity modelling for key areas identified in roadmap

Segmentation 

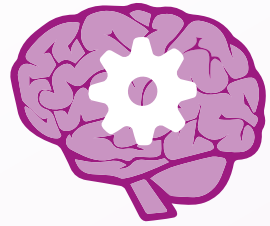
- Run test campaigns to verify segmentation accuracy
- Segment target market using trained algorithm
- Identify training data
- Create a unified customer view

Early stages 

- Begin testing data modelling and assumptions required for use cases
- Find key variables
- Create integrated dashboards
- Integrate CRM with other sources of marketing data

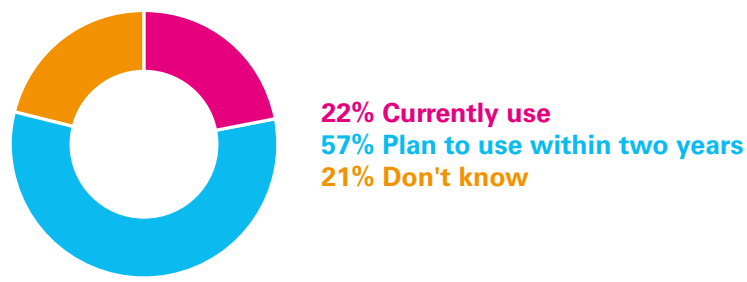
Prepare data and organization 

- Build an AI roadmap
- Assess organisational set up
- Define behaviours and interests for target market
- Identify and understand key metrics and use cases
- Assess data collection operation
- Establish CRM system



STEPS TO AI MATURITY

Figure 11: Marketers Currently Using AI or Planning to Use AI



Source: Salesforce, 2019

Aside from AI and automation, brand values and storytelling are considered the third most likely factors to be a major talking point (41.8%), once again emphasising how this is a major focus for marketers in 2019/2020.

Above that came the unification of marketing, customer service and experience. If brands are looking at a more coherent identity that presents certain values, then it makes sense to expect that customer service and marketing will be more closely integrated to enhance that experience.

Already, marketing departments are often integrated into customer service operations. According to the [Incite State of Customer Service 2020 report](#), 20.4% of brands have customer service sit within their marketing teams. Just under a quarter of brands also said that they have a dedicated social customer care team that works within the marketing department. If you would like to find out more about customer service and how it is changing, then check out [the complete report for free here](#).

Artificial intelligence will also have a key role to play in customer service, as it can dramatically improve the customer's journey above what is humanly possible. AI can proactively suggest options, directing the customer to the fastest route to answer their query through running pattern analysis to see how queries and complaints correlate to a variety of fields, such as mode of communication, time of call, position in the journey or known prior queries. If automated solutions don't succeed, AI can arm customer service agents with a suite of supporting information, which will improve the likelihood of a speedy and successful resolution.

There will need to be a balance between monitoring, help and data security, however. The issues of transparency, privacy and trust are thought to be fairly major considerations for the marketing sector heading into 2020. Among our respondents, 34.8% felt that it would be a major talking point, reflecting the increased prominence the issue has in both the minds of businesses and consumers.

From the Equifax data breaches, to the first major GDPR fines, to Facebook's indiscretions and a pretty much rolling set of stories of hacks, misused government cyber weapons, and tech giant privacy failings, these issues have never been far away from headlines over the last three years. This has raised awareness substantially from customers across the spectrum and means marketers will need to be more considerate of data rights than they may have been previously, especially in already privacy-sensitive markets with increasing legislation, such as Germany.

Reflecting prevailing attitudes and legislative frameworks, respondents in Europe and North America were nearly twice as likely to rate this as a major talking point to those based in Asia-Pacific. In North America 38.5% felt that it would be important in 2020 and 39.3% said the same in Europe, compared to just 20% in Asia-Pacific. This stark contrast once again affirms the lower data and privacy standards prevalent across the region and a lower interest and ability among consumers and businesses in protecting their data.

Figure 12: Transparency, Privacy and Trust Considered Less Important in Asia-Pacific



38.5% in North America say transparency, trust and privacy will be a major talking point in 2020

39.3% in Europe say transparency, trust and privacy will be a major talking point in 2020

20.0% in Asia-Pacific say transparency, trust and privacy will be a major talking point in 2020

Source: *The State of Marketing 2019*

METHODOLOGY

Incite Group conducted a survey of self-identified marketing professionals between 7th May 2019 to 30th May 2019. These respondents were taken from both Incite’s internal database of marketers but select external partners were also used. A total of 954 respondents replied to our survey and 565 completed the survey to end. The following is a breakdown of how respondents identified themselves.

What Type of Company Do You Work for?



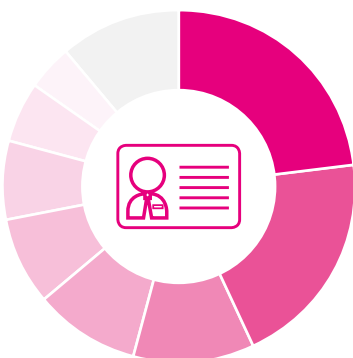
- Agency - 18.7%**
- B2C Brand - 20.2%**
- B2B Brand - 29.5%**
- Martech Vendor/Technology Partner - 6.5%**
- Not For Profit - 6.2%**
- Press/Media - 1.8%**
- Other - 17.2%**

Where Are You Personally Based?



- North America - 50.7%**
- Europe - 23.6%**
- Asia-Pacific - 15.4%**
- Rest of the World - 10.3%**

Which of the Following Best Describes Your Role’s Predominant Focus?



- Senior Leadership - Overarching Strategy - 23.2%**
- Brand Marketing - 20.0%**
- Product Marketing - 11.2%**
- Content Creation - 9.6%**
- Performance Marketing - 8.1%**
- Customer Experience - 7.3%**
- Social Media Strategy - 5.4%**
- Customer Insights & Analytics - 4.1%**
- Other - 11.1%**

Approximately How Big is the Company You Work For?



- Less than 25 Employees - 29.6%**
- 25-49 Employees - 10.1%**
- 50-199 Employees - 17.1%**
- 200-999 Employees - 17.9%**
- 1,000-9,999 Employees - 14.8%**
- 10,000-49,999 Employees - 5.4%**
- 50,000-100,000 Employees - 2.0%**
- Over 100,000 Employees - 3.3%**

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Authentic Engagement on a Personal Level

Move Your Customer with Engaging Stories, Personalized Journeys,
Innovative Social and Impactful Influencers.



Allison Cerra
McAfee
Chief Marketing Officer



Eric Asche,
Truth Initiative
Chief Marketing Officer



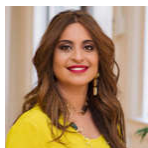
Vilma Gupta
Equinox Fitness
Chief Marketing Officer



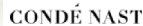
Jonathan Beamer
Monster
Chief Marketing Officer



Muriel Lotto
Western Union
Global Head of Marketing and Brand



Aditi Javeri Gokhale
Northwestern Mutual
Chief Marketing &
Communications Officer



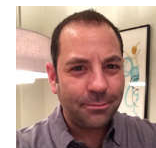
John Shehata,
Condé Nast
VP, Audience
Development Strategy,



Stacy Taffet
Pepsico
VP Marketing, Hydration
Portfolio,



Chris Villarreal
Goldman Sachs
VP, Integrated Marketing
Communications



Kevin Peck
AT&T
SVP of Brand, Strategy, Design
and Brand Management

INDUSTRY'S CHOSEN THEMES:

Emotive, Creative and Engaging Storytelling

Cut through the noise with impactful interactions that inspire. Tell stories that engage on an emotional level but are grounded in brand.

Understanding and Personalizing Customer Journeys

Fully understand your customer and their journey to unlock data-driven personalized experiences at moments that matter.

Impactful Influencer Marketing & Innovative Social Content

Amplify your reach! Create and distribute a large amount of content with less effort and lower overheads. The formula for social success: collaborate with the right influencer's, empower employees, leverage live streaming and engage with ephemeral.

The Future of Marketing

Keep brand relevancy in an ever-changing world. Find your purpose, reinvent a legacy, culture innovation and truly embrace digital transformation

LEARN FROM THE FOLLOWING BRAND MARKETING LEADERS:



500+

Marketing Leaders Attend

55+

Big Brand Speakers

2 DAYS

Of Learning Networking
& Inspiration

100%

Focused on In-House
Marketers



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