STATE OF MARKETING 2020

DATA, KPIS AND PERSONALIZATION

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CONTENTS

LIST OF FIGURES

INTRODUCTION

In 2020, 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 are their top priorities 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 that are expressed coherently throughout 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 they are 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 resonate 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 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, but 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.

Alex Hadwick

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DATA, KPIS AND PERSONALIZATION

Modern marketing and data are now synonymous. With the advance of digital marketing to become the dominant form of reaching the customer, marketing has become a data-first industry. Respondents to our industry survey are expanding their number of data sources into double digits and the majority of organizations are now using some form of personalization in their campaigns.

Marketers are also increasingly using a broad range of metrics to measure and understand success, which is important in the context of a marketing ecosystem with a wide range of channels and mediums in which target audiences can be reached. It is no longer enough to use one broad Key Performance Indicator (KPI) and hope that this explains and justifies actions. Instead, increasing granularity is required and marketers appear to be understanding this.

However, there remain gaps in organizational knowledge and information flow, with relatively small numbers of teams or individuals holding much of the data and running the analysis. The next step is to broaden access and understanding of data both through increasing the number of individuals involved in marketing and improving accessibility across organizations. As yet, there remain significant percentages of marketers who do not have full access to data, particularly when it lies outside of their organization's direct purview and there is enormous potential to make strides when it comes to effective personalization.

Already, personalization is driving value for organizations and helping to improve the Return On investment (ROI) in campaigns. Despite this, we found that most of the industry has an incomplete picture when it comes to personalization and are currently targeting using relatively scant levels of information. Under half of marketers in the research said that they currently use data from their own sites for personalization, 37% said they use previous purchases and under a quarter utilize historical search data.

Marketers will therefore need to address gaps in their wider information ecosystem, consider more long-term metrics, and integrate data more fully in the coming years if they want to reap the full benefits of data and deploy personalized marketing effectively.

1.1. Key KPIs

Every campaign now needs to justify itself and can be measured in a much more granular level than before. The famous saying of not knowing which half of a marketing budget is being wasted no longer needs apply. So, what are the most popular means of judging success among marketers?

Currently marketers are focused on the most accessible KPIs, with cost per acquisition/sale (46.2%) and social media engagement measures (43.5%) the most common metrics used to judge the success of a campaign, followed closely by cost per lead, contact or download (39.5%).

It is clear that marketers are looking first and foremost at the ROI of their campaigns and the immediate impact these have on the bottom line.

Longer-term metrics that are more focused on brand loyalty and customer views of the organization are less frequently used among marketers. For lifetime customer value, 34.1% say this is regularly used to measure success and 30.8% say the same of retention rates.

It is likely that because these measures are most helpful at measuring results over extended, standardized time periods, they are less immediately accessible to marketers, who are often focused on short term uplifts from campaigns. However, given the growing importance of brand reputation and trust, marketers may want to turn more attention to these metrics and certainly should be keeping an eye on them in the background. Their capacity to understand the stickiness of a brand and customer loyalty is important in and of itself, but being able to link this back to marketing and remarketing efforts adds a great deal of potential value.

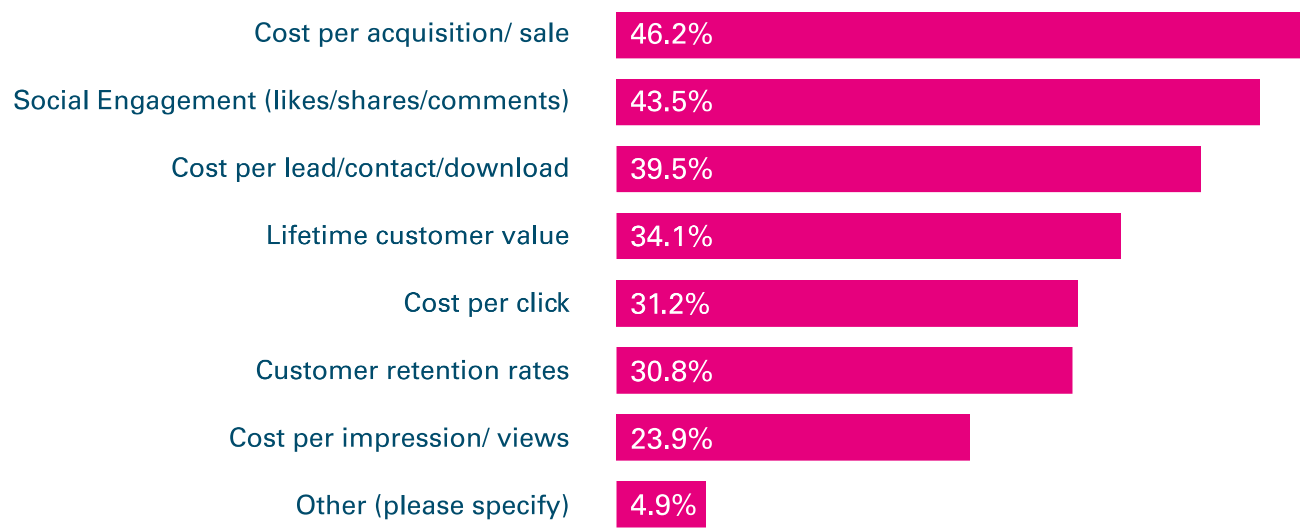
> *"Measuring the business impact of brand marketing investments continues to be a priority for my team as we make the case to expand our campaigns. The ROI question is especially elusive in the early stages of a brand advertising journey, so my team is evolving our data-backed approach."*

Connie Chan Wang, Director, Global Brand Marketing, LinkedIn

Bringing up the rear is cost per impression, with 23.9% judging it an important KPI. It would appear that as ad blocking software becomes more prevalent and banner marketing less important, impressions are slipping out of favor as a way to measure reach and success in a campaign. This may also reflect fraud and opacity when it comes to this particular metric, with organizations often reliant on external data for the number of impressions and having little visibility as to whether these figures are indeed correct, with controlled testing through directly-owned data required to verify uplift.

It is estimated that fraudulent impressions as a result of bot activity accounts for a significant proportion of all impressions, with the White Ops & ANA 2018-2019 Bot Baseline Report estimating that 20% to 35% of ad impressions are fraud attempts and CHEQ calculates that 18% of online ad traffic was fraudulent (White Ops and ANA, 2019; Fourth Source, 2019). Although the estimated level has been falling in the last two years, according to the Bot Baseline report, there may also be a move towards areas where it is more difficult to detect. Even the biggest players themselves have been found to be fiddling the numbers, as Facebook was caught in a major scandal regarding how it measured and reported video ad impressions on its platform, inflating viewing time to the detriment of advertisers, alongside several other measurement errors over the last few years. It is therefore of little wonder that impressions are out of favor.

Figure 1: Which of the Following KPI's Do You Find Yourself Using the Most Often to Judge the Success of a Campaign or Across Campaigns?



Source: The State of Marketing 2020

Looking at the key metrics across different regions, there appear to be a few noteworthy trends. In particular, marketers in Asia-Pacific are more focused on long-term metrics, as well as cost-per-acquisition or sale.

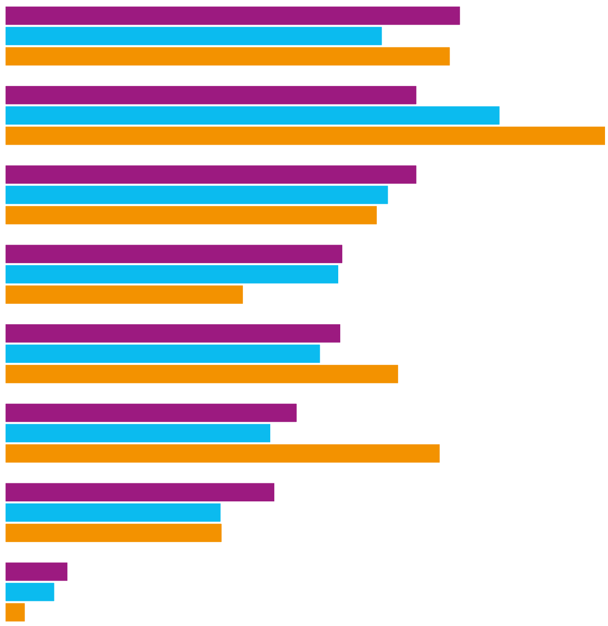
Marketers in Asia-Pacific regularly use lifetime customer value to measure success in 38.8% of cases, versus 33.1% in North America and 31.1% in Europe. However, the difference is even more stark when looking at customer retention rates, with 42.9% of Asian marketers noting it as key, compared to 28.8% and 26.2% in North America and Europe, respectively. Marketers in Asia-Pacific are also around 10 points less likely to say they use CPC as a key metric.

It appears that marketing professionals in Asia-Pacific view funnelsslightly differently to those in Europe or North America, looking less at the costs in the upper funnel and instead focusing on sales and retention acquisition. This may be linked to different behaviors on mobile platforms and the need to focus on remaining front of mind for consumers, so that they retain a presence in consumer's app usage.

Reflecting slightly lower rates of social media usage in Europe and tighter privacy controls, marketers in this region were less likely to report that they regularly use social media metrics. Some 37.2% of those in Europe said engagement measures are key, compared to 43.6% in Asia-Pacific and 44.9% in North America. As we shall see later in other areas in this report, privacy factors also play into different regional approaches to data and personalization.

Figure 2: KPIs Used to Judge the Success of Campaigns by Region

	North America	Europe	Asia-Pacific
Social Engagement (likes/shares/comments)	44.9%	37.2%	43.9%
Cost per acquisition/sale	40.6%	48.8%	59.2%
Cost per lead/contact/download	40.6%	37.8%	36.7%
Cost per click	33.3%	32.9%	23.5%
Lifetime customer value	33.1%	31.1%	38.8%
Customer retention rates	28.8%	26.2%	42.9%
Cost per impression/ views	26.6%	21.3%	21.4%
Other (please specify)	6.2%	4.9%	2.0%



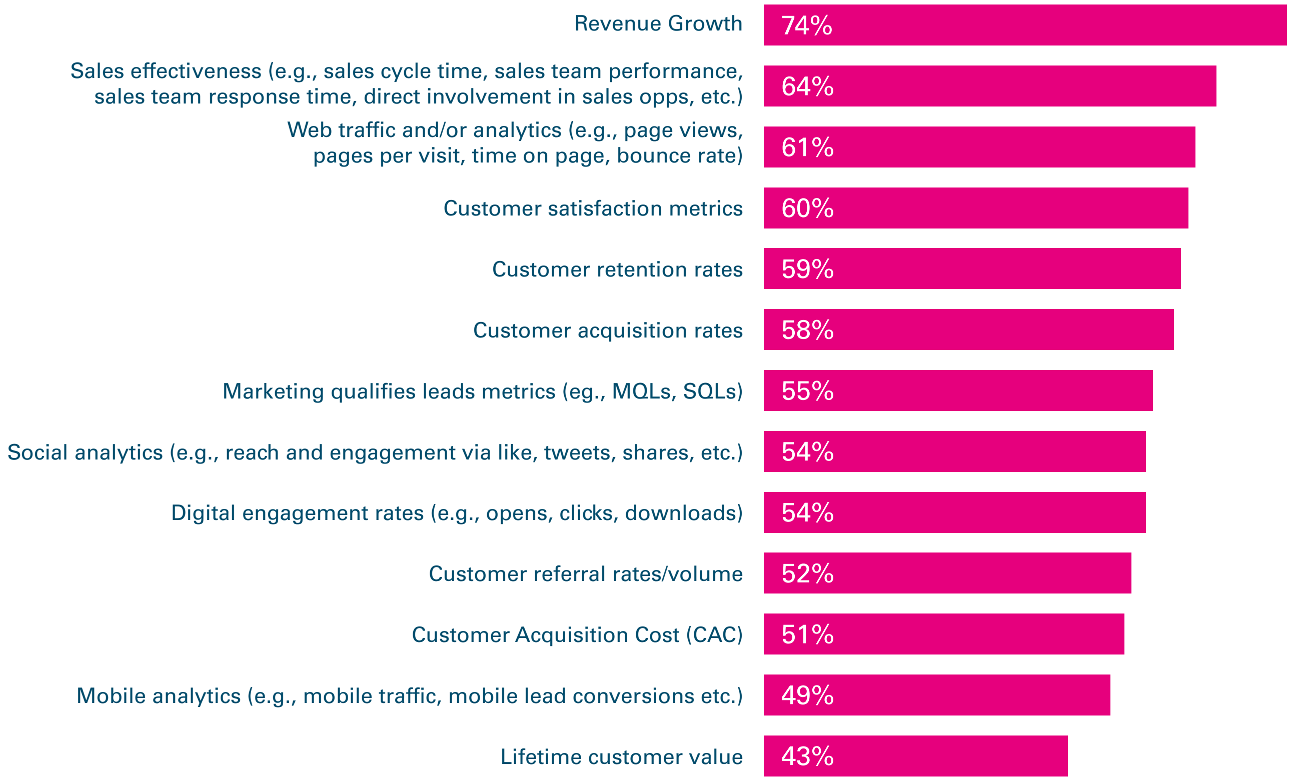
Source: The State of Marketing 2020

Cross-referencing our data with other sources appears to show that there is a general trend among marketers to focus on short-term uplifts from campaigns and breaking that down into ROI. Salesforce found that the top metrics tracked by marketing organizations were revenue growth and measures of sales effectiveness at 74% and 64%, respectively. Conversely, lifetime customer value came at the bottom of KPIs, with 43% noting that they track this measure.

"Marketers must understand their incremental CAC (cost of customer acquisition) and incremental LTV (lifetime value) for as much of their activity as possible."

Alex Weinstein, SCP of Growth, Grubhub

Figure 3: Percentage of Marketing Organizations That Track the Following Metrics



Source: Salesforce, 2019

"LinkedIn is only two years into our brand advertising journey, which is likely the hardest part of the journey in terms of proving ROI because it takes years of consistent investment at scale to model out impact. While we have proven our ROI in four-city tests over the course of a year, we are still on the journey of proving out impact at a national scale."

Connie Chan Wang, Director, Global Brand Marketing, LinkedIn

It is clear therefore that although marketing professionals are getting to grips with measuring effectiveness in the digital advertising age and deploying a wider array of metrics, that there is still room for improvement. Marketers remain focused on short-term measures and looking at immediate uplifts generated by campaigns. They need to make more effort to focus on the relationship with the consumer over longer time periods, considering how they relate to their brand and how their campaigns create resonance that makes customers return frequently, especially given the lower costs for successfully retaining customers compared to first-time acquisition.

1.2. Diving into Data

The modern marketing landscape is now a data-driven one and information has become one of the key competitive advantages marketers can leverage to generate creating successful campaigns. Target audiences can now be identified and understood with a level of granularity not possible just a decade ago, creative can be modified automatically to suit audiences, and AI-led conversations can be started on a one-to-one basis through social media.

The modern marketer is one who is supported by automated outreach and data-led decision-making.

However, all of this requires a strong capacity to take in, prioritize, analyze and utilize data so that it drives meaningful interactions with customers.

From our results, it appears that organizations are getting to grips with internal data and beginning to look at multiple sources to create a picture of their target audiences and the results of campaigns but there is still much work to be done.

A fully integrated picture remains some way off, with data often inaccessible or not widely distributed in organizations. Information from external sources, which is often critical to giving context around campaigns, is frequently not present, and as seen in the *Investments and Budgets* section of this report series, there are often not enough supporting systems to record and analyze data, with Customer Data Platforms (CDPs) and Data Management Platforms (DMPs) used by less than a third of marketers.

"The responsibility for a successful end-to-end experience is almost always shared by the marketing, product and delivery teams and they all need to ensure consistency in how they define the main customer segments, track performance and jointly agree on what success looks like."

Hai Habot, Senior Director, Incubation and Growth, Stubhub

Systems like these are going to be vital as organizations find themselves holding, and needing to analyze, more data.

Already in our survey we found that, on average, marketers are into the double digits when it comes to the data sources they use to understand and target their audiences. Across the survey population, respondents reported that they use 11 data sources. This represents a positive step towards understanding that breaking down audiences and judging success cannot be a case of a few isolated data points and one or two KPIs, but rather a concerted effort looking at data from different platforms and perspectives.

Figure 4: How Many Data Sources Are You Using to Understand and Target Customers?

Source: The State of Marketing 2020

Although our research points to organizations seeing the need for increased data volumes from more perspectives, there are still major gaps in where they are sourcing information and the dissemination of that data across organizations.

Internally, most marketers now report that their own first-party data is now widely available and utilized within their organizations. Among our respondents, 72% note that this form of data is integrated into their operations and a further 15% say that they do utilize first party data but in a limited manner, leaving just 13% of marketers who do not have even this most rudimentary basis to work on. A majority of respondents – 53% – said that first-party data availability is distributed either across multiple teams (31%) or is fully integrated and visible across their organizations (22%).

This picture rapidly changes when we look at external second- and third-party data, however, with many finding their access to these sources limited to some degree or not available.

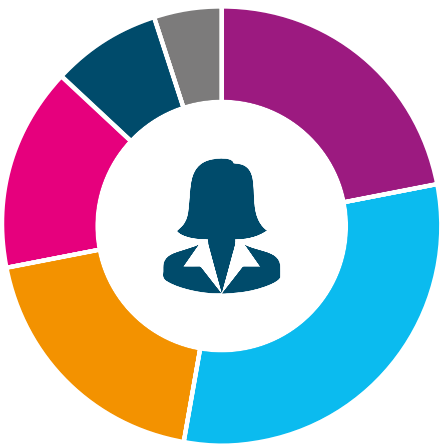
"Estée Lauder Companies leverages a multi-stage marketing mix modeling approach that allows us to measure the impact of marketing efforts at each stage of the consumer funnel (desirability, consideration/traffic and conversion/sales)."

Doug Jensen, Senior Vice President, CRM, Corporate Marketing Analytics and Innovation Insights, Estee Lauder

Second-party data, which is first-party data acquired and then usually sold on and can include surveys or social media usage, is only integrated in 50% of organizations we surveyed. Within the half of organizations with access to this, just 7% had integrated data available across their entire organization, and in the other half, 28% said that they did not have any access at all to data from these providers.

Third-party data, defined as aggregated (and usually anonymized) data collected via an exchange or intermediary and then passed on, often through a DMP, is even less widely available. A huge 41% of marketers say they do not have visibility over this type of information with 15% noting that they don't have expertise or resources to do so. Just over a third of organizations (34%) note that they have some form of integration, most in small numbers of teams (13%) or a single team (16%) within their internal structure.

Figure 5: Marketing Organizations Capabilities with First-Party Data



22% This data is fully integrated and accessible across the organisation

31% This data is integrated and used by a small number of teams in the organisation

19% This data is integrated and used by a single team in the organisation

15% We sometimes extract and use this data where possible

8% We would like to use this data but do not have the expertise or sources

5% We do not use this data in our organisation

Source: The State of Marketing 2020

Figure 6: Marketing Organizations Capabilities with Second-Party Data

This data is fully integrated and accessible across the organisation **7%**

This data is integrated and used by a small number of teams in the organisation **20%**

This data is integrated and used by a single team in the organisation **23%**

We sometimes extract and use this data where possible **22%**

We would like to use this data but do not have the expertise or sources **13%**

We do not use this data in our organisation **15%**

Source: The State of Marketing 2020

Figure 7: Marketing Organizations Capabilities with Third-Party Data

5% This data is fully integrated and accessible across the organisation

13% This data is integrated and used by a small number of teams in the organisation

16% This data is integrated and used by a single team in the organisation

25% We sometimes extract and use this data where possible

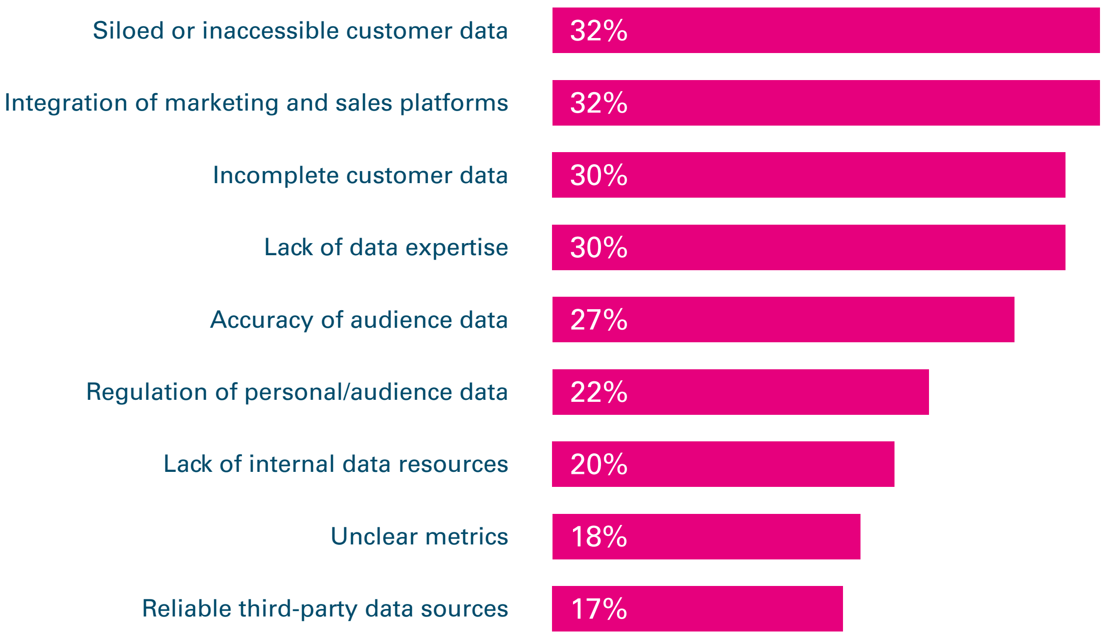
15% We would like to use this data but do not have the expertise or sources

26% We do not use this data in our organisation

Source: The State of Marketing 2020

A survey of marketers from Dun & Bradstreet points to where some of the friction exists in getting data more incorporated into the marketing space. The top two roadblocks found in the research were customer data being siloed or inaccessible and the failure to institute proper integration between marketing and sales databases, closely followed by incomplete customer data and lack of data expertise (Dun & Bradstreet, 2018). It seems from this information and our own that there is a knowledge gap in the marketing space in terms of Information Technology (IT) expertise to integrate different databases and data sources, as well as in data and analytics professionals that can help interpret the data effectively. This is creating a lack of confidence in the data that is present and holding back marketers from expanding their knowledge base to a wider pool that can enrich their audience information and abilities. Marketers therefore need to be realistic and add expertise to interpret information and disseminate it in a way that is understandable across organizations.

Figure 8: What Do You See as Your Company's Biggest Obstacles to Succeeding with Data-Driven Marketing?



Source: Dun & Bradstreet, 2018

The drop off in integration of data from second- and third-party data streams is concerning and will hold back marketing capabilities, especially given that much of this data is now becoming more accessible and usable to a mainstream audience. Second-party data should now be par for the course for most modern marketers, with the major tech giants making access to their own first-party data easier than ever and basic social media data now a necessity for most marketers rather than an optional extra.

While tighter data restrictions and a diminishing faith in the power of display advertising among marketers may lower the priority level on acquiring third-party data, both second- and third-party data sets have a lot to offer marketers, and their power is really in the integration with owned data sets. It is increasingly critical for marketers to cover the blindspots and potential missed opportunities through the combination of different datasets. For example, interrogating internal datasets can create a useful customer profile. Conferring with second- and third-party datasets then makes this exponentially more powerful through enriching that profile and using lookalike segmentations and targeting to reach new audiences with high ROI advertising. We can therefore expect the integration and utilization of external data sources to rise slowly but surely over the coming years.

1.3. Perfecting Personalization

The end game of much of the inbound data arriving in marketers' databases is to push towards more effective personalization. With the mass of noise surrounding consumers and businesses, as well as an erosion of trust, there is a clear need to cut through and reach audiences with marketing that resonates swiftly and builds relationships. This cannot be effective without a strong data ground game and a plan for personalization that is founded on the right means to reach an audience with a defined rule set.

"This past decade was about moving from one message to all, to personalization at scale. Now it's about 1:1 personalization, so each individual will get the message that really reflects that the brand understands her needs, motivations, and how our products can solve for that."

Doug Jensen, Senior Vice President, CRM, Corporate Marketing Analytics and Innovation Insights, Estee Lauder

As we noted earlier, many marketers are still putting together the pieces of the data puzzle and integrating data from multiple sources. This foundational stage means that most marketers are using relatively simple means to segment their audiences currently and sophisticated, highly-personalized marketing remains some way off in the future. However, there is positive news in that just 11.5% of marketers in our survey said that they cannot personalize their campaigns in any way at this point.

Instead, the most common means used to personalize campaigns currently are location and website usage, at 63.8% and 48%, respectively. They are followed at a lower tier by purchase history (36.8%), age (33.3%), social data (31.7%), gender (27.6%), cookie data (26.5%), and search history (24.1%).

This reflects the results we saw earlier in this section regarding integration of data from other sources. Low levels of external data are hampering efforts to create more personalized campaigns, with the most common means of doing so generally relying on relatively simple information that can be gleaned from internal repositories of data and likely done at a relatively high level of segmentation rather than drilling down to small subsets of potential customers.

Similarly, when it comes to other research into the advertising forms where personalization is being deployed, it paints a picture of a nascent, rather than a mature, field. A 2019 survey of marketers from Evergage found that email is still by far the leading area for personalized marketing currently, with 78% of marketers noting they personalize emails, as oppose to 35% who do so in online advertising efforts and 28% who do so in mobile applications. Furthermore, just 16% of their sample reported that they were highly satisfied with their efforts when it comes to personalized marketing, underlining that most are not where they want to be (Evergage, 2019).

"In many products today, the consumption patterns have changed, and multiple parts of the customer journey occur on mobile devices when customers are on the go – from initial inspiration and awareness to conversion, recurring usage and advocacy. This provides brands with an opportunity to get closer to the customers and connect with them quickly through chat, push notifications, location aware content and more. These communications can be more effective and efficient and help drive conversions in new ways that keep getting more and more exciting and interesting."

Hai Habot, Senior Director, Incubation and Growth, Stubhub

Looking even further out to one of the most personal modes of communication, 8.1% said they are working on an ability to work with voice-activated assistants. Although voice remains a nascent technology in many ways, it is important to note that there are already billions of voice-activated systems deployed globally, with just over 4 billion estimated to be in use by the end of 2020, according to Juniper Research (Statista, 2019).

Figure 9: Fields Used to Personalize Marketing Campaigns

Source: The State of Marketing 2020

Looking at how different types of organization are approaching the task of personalization, there are major differences in approach based on target audience, with B2C organizations and agencies more likely to personalize campaigns against a range of personal data fields, such as age, gender and social data. Age and gender showed the greatest difference, with just 12% of B2B marketers using the former for personalization and 10.9% for the latter, compared to 52.5% and 43.3% for B2C organizations. B2B companies on the other hand were far more likely to use previous downloads to personalize campaigns and to utilize internal interest tags or tokens to aid this, with a third of B2B marketers looking at content downloads, versus just 4.2% of B2C marketers.

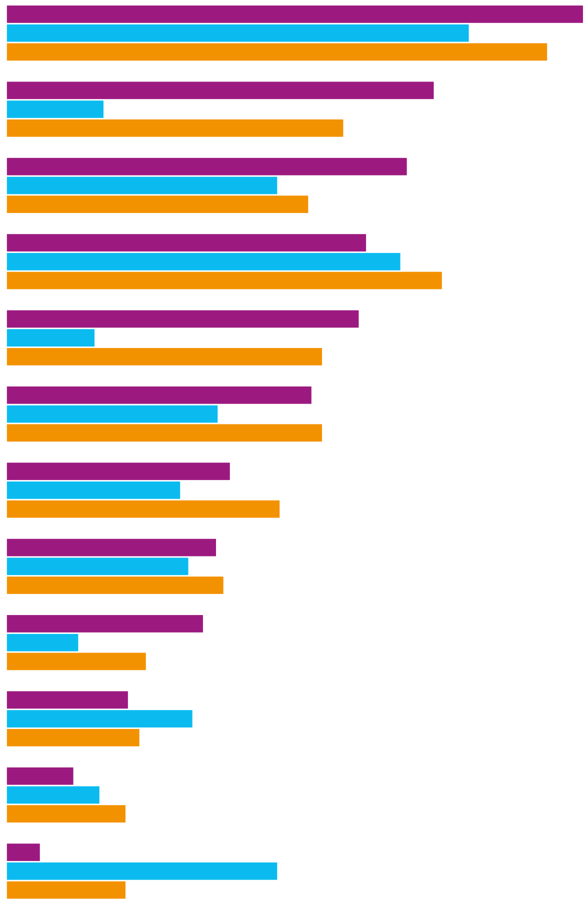
"Personalization is all about understanding the customers and managing a delicate pull and push relationship with them based on micro signals of needs and wants. As such, it has to start with a thorough mapping the journey for each customer type or persona and understanding the key behaviors and motivations that drive the customer within a particular funnel or within their greater journey."

Hai Habot, Senior Director, Incubation and Growth, Stubhub

It is also worth noting that agencies lower level of access to direct data on consumers means that they are slightly more reliant on third and second party data formats, taking the lead in utilizing website usage, social data, tracking cookies and search history to personalize campaigns. This trend can also be seen in the difference between B2C and agency marketers in using purchase history, where 49.2% of B2C marketers are able to use this data versus 37.1% of agencies.

Figure 10: Fields Used to Personalize Marketing Campaigns by Organization

	B2C	B2B	Agency
Location	70.8%	56.8%	66.4%
Age	52.5%	12.0%	41.4%
Purchase history	49.2%	33.3%	37.1%
Website usage/engagement	44.2%	48.4%	53.5%
Gender	43.3%	10.9%	38.8%
Social data	37.5%	26.0%	38.8%
Tracking cookie data	27.5%	21.4%	33.6%
Search history	25.8%	22.4%	26.7%
Cart abandonment	24.2%	8.9%	17.2%
Internal interest tag	15.0%	22.9%	16.4%
We cannot personalise our marketing	8.3%	11.5%	14.7%
Previous downloads	4.2%	33.3%	14.7%



Source: The State of Marketing 2020

Trends in privacy and data access mean that there is also diversity in how personalization efforts are progressing in different regions, with Asia-Pacific taking the lead when it comes to personalizing through consumers' personal data. Marketers in Asia-Pacific were noticeably more likely to say that they utilize location, age, gender, and search history than their counterparts in North America and Europe.

A large part of this is ease of access to these kinds of data, consumer views on privacy and more lax regulatory stances in many countries across the region. As we noted in the *Key Trends and Major Priorities in 2020* section of this report, marketers in Asia-Pacific are nearly half as likely to say that privacy is going to be a key trend in 2020 compared to their contemporaries.

Although data protection laws in the Asia-Pacific region have been strengthened in recent years, it is somewhat telling that only Japan and New Zealand have granted an equivalency (or adequacy) status by the EU when it comes to data privacy in the region, allowing the transfer of personal to entities in these countries without restriction.

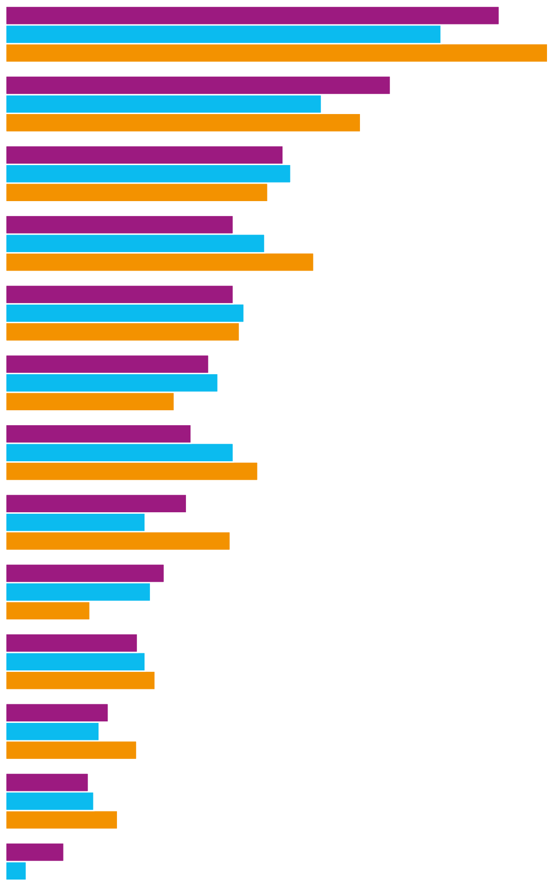
"Grubhub can only be successful if our consumers continue coming back after their first few experiences with us. One super critical aspect of creating this long-term relationship is understanding the customer – both by explicitly asking them, and by implicitly observing their actions, to be able to offer them relevant, personal recommendations that make each consumer feel 'known'."

Alex Weinstein, SCP of Growth, Grubhub

Once again, it is worth noting that that personalization capabilities across the marketing spectrum are driven by different availabilities of data. Greater access to personal data in Asia-Pacific is allowing the deployment of personalization capabilities across a wider range of fields than their counterparts in North America and Europe. Similarly, B2C companies' greater depth of first-party information is allowing them to add personalization to a greater degree number of fields, such as purchase history. While these are natural and obvious differences that derive from the conditions of marketers in these spaces and their target audiences, it does emphasize how important data is for personalization and how it sets the playing field for all further endeavors in the space. Without the prerequisite data formatted and stored in a compliant and accessible manner, personalization simply cannot occur in those fields. Marketers should take note and focus hard on setting the groundwork for personalization through their data gathering and management programs.

Figure 11: Trends in Fields Used to Personalize Marketing Campaigns by Region

	North America	Europe	Asia-Pacific
Location	64.4%	56.8%	70.7%
Website usage/engagement	50.2%	41.2%	46.3%
Purchase history	36.2%	37.2%	34.2%
Age	29.7%	33.8%	40.2%
Social data	29.7%	31.1%	30.5%
Tracking cookie data	26.5%	27.7%	22.0%
Gender	24.2%	29.7%	32.9%
Search history	23.6%	18.2%	29.3%
Previous downloads	20.7%	18.9%	11.0%
Internal interest tag	17.2%	18.2%	19.5%
Cart abandonment	13.4%	12.2%	17.1%
We cannot personalise our marketing	10.8%	11.5%	14.6%
Other (please specify)	7.6%	2.7%	0.0%

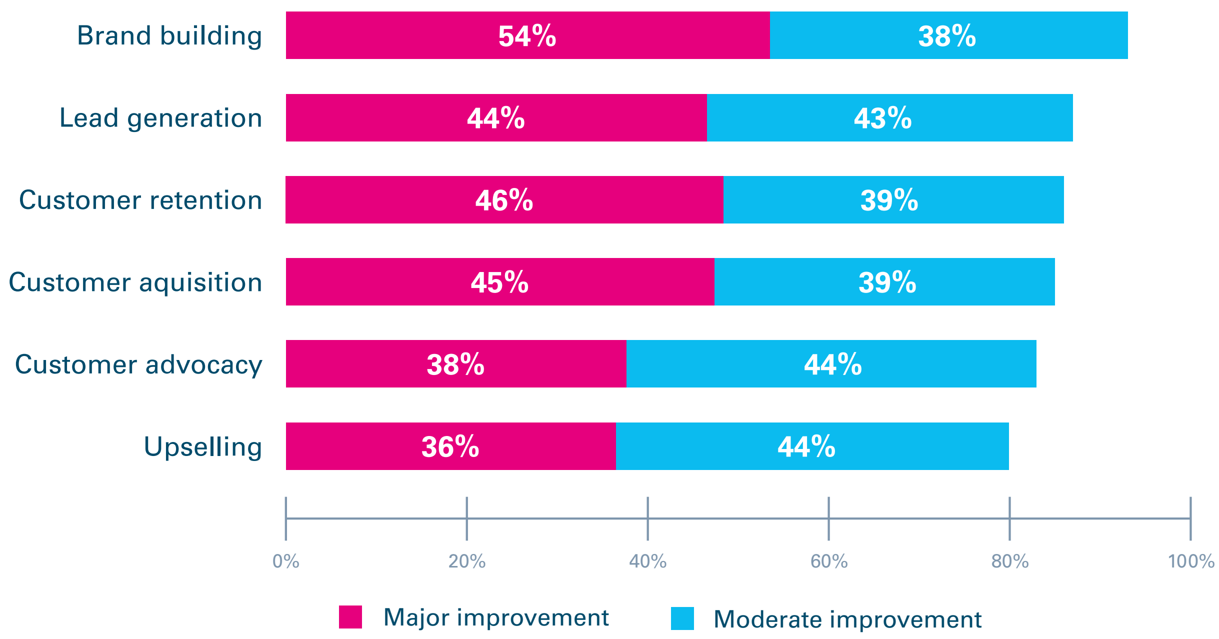


Source: The State of Marketing 2020

We can expect efforts to put in place the foundations for personalization and the propensity to use it in campaigns to accelerate in coming years due to the effectiveness of personalization being uncovered by marketers.

In Salesforce's 2019 survey of marketers, they found that a wide range of objectives were improved by adding in personalization to campaigns. Across brand building, lead generation, customer retention, customer acquisition, customer advocacy, and upselling 80% or more of marketers said that personalization made a material improvement, with 54% saying that it had a major improvement in brand building and 46% in customer retention, showing that there is value to pursuing personalization at all levels of the marketing funnel (Salesforce, 2019). This is not a standalone result, with Evergage finding that 93% of marketers had seen some uplift from personalization efforts and within this, 52% reported a strong impact and 18% an extremely strong impact, leading to a median uplift of 11% to 20%. They also found that 85% of marketers now believe that customers expect personalization (Evergage, 2019).

Figure 12: Percentage of Marketers Who Say Personalization Improves the Following



Source: Salesforce, 2019

"We … use data and analytics and machine learning to understand, through combing ratings & reviews sites, what types of products consumer want, for what benefit, and triangulate that with proprietary consumer research to improve our commercial innovation."

Doug Jensen, Senior Vice President, CRM, Corporate Marketing Analytics and Innovation Insights, Estee Lauder

Personalization efforts will also be helped by the increasing availability and deployment of technological aids that will help to democratize the process. Greater adoption of data management systems will allow for more unification of data and a diminishment in siloes that will mean customer profiles can be unified and lead to meaningful personalization. Progress in machine learning capabilities and more companies offering the capacity to analyze and create actionable findings on your data will mean that building personalized campaigns will become easier. And as noted in the *Investments & Budgets* section of this report, marketers are putting their dollars into marketing automation and business intelligence platforms, illustrating the awareness of the need to improve data capabilities but also the capacity to action on these with personalized, automated campaigns.

2020 therefore should be an exciting year for the development of personalization driven by stronger underlying fundamental data and analytics capabilities as marketers both continue to develop their recognition of meaningful personalization and also the critical elements that make this possible.

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.

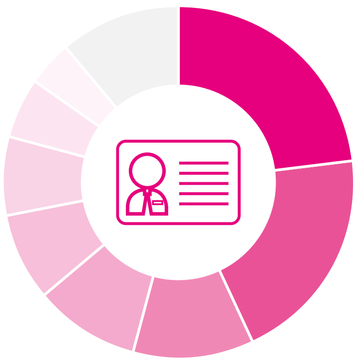
What Type of Company Do You Work for?

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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REUTERS EVENTS™ INCITE GROUP

This Is a Call to End Inauthentic Impersonal Marketing.

600+ MARKETEERS | **60+ EXPERT SPEAKERS** | **70%+ BRAND ATTENDANCE** | **100% STRATEGY FOCUSED**

With an influx of new technology and big data, the past decade was a learning curve for the next phase of marketing – one where **brands are purpose-driven, campaigns are truly data-backed, and personalization makes marketing valuable.**

It's been a decade of data-fuelled opportunity and we've seen some of the most effective marketing campaigns in history, but we've also heralded some of the most damaging. It's time to look at the whole customer journey and deliver the ultimate experience.

Mission Statement

Customer expectations are at an all-time high and brand trust at an all-time low. Now, more than ever, we must come together as a community to eradicate the "quantity over quality" mentality that has consumed marketing and redefined the role of the CMO. We must reinvent our proposition and become true business leaders. Join the movement to end inauthentic, impersonal marketing and bring back brand trust.

JOIN THE MOVEMENT HERE