FIFTH EDITION

State of
Marketing

Insights and trends from over 4,100
marketing leaders worldwide
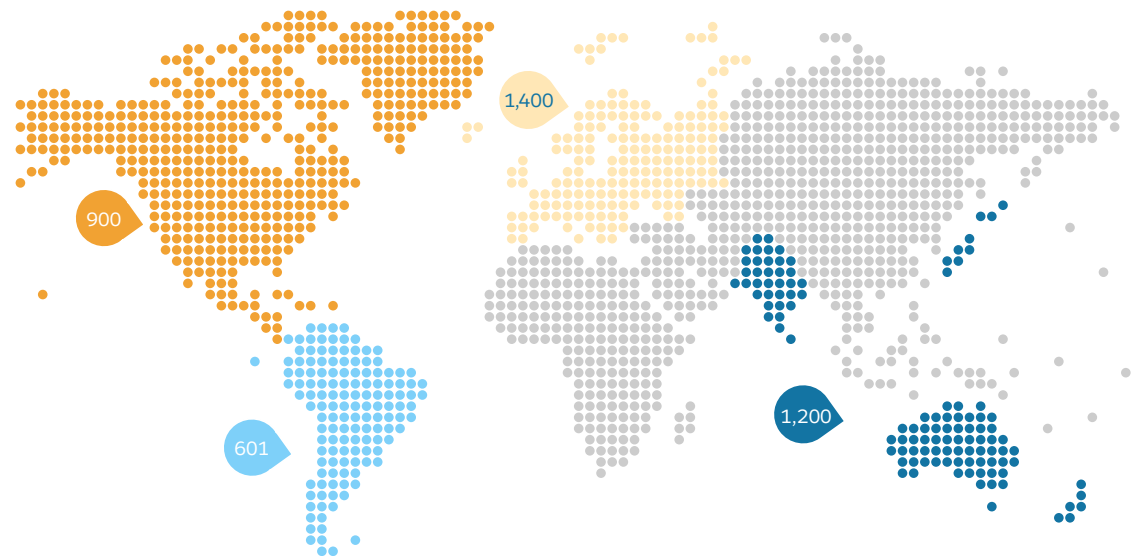
salesforce | research

About This Report

For the fifth edition of our "State of Marketing" report, Salesforce Research surveyed over 4,100 marketing leaders worldwide to discover how:

- Cross-functional dynamics are shifting to satisfy customer and business demands
- Data – and how it's used – is transforming how marketers operate
- Personalization is becoming more refined at the crossroads of intelligence and trust
- New standards of engagement are inspiring and challenging marketers

Data in this report is from a double-blind survey conducted from August 13 through September 23, 2018, that generated 4,101 responses from full-time marketing leaders – those holding a manager or higher leadership role. Survey respondents are from North America, Latin America, Asia-Pacific, and Europe. All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 56.
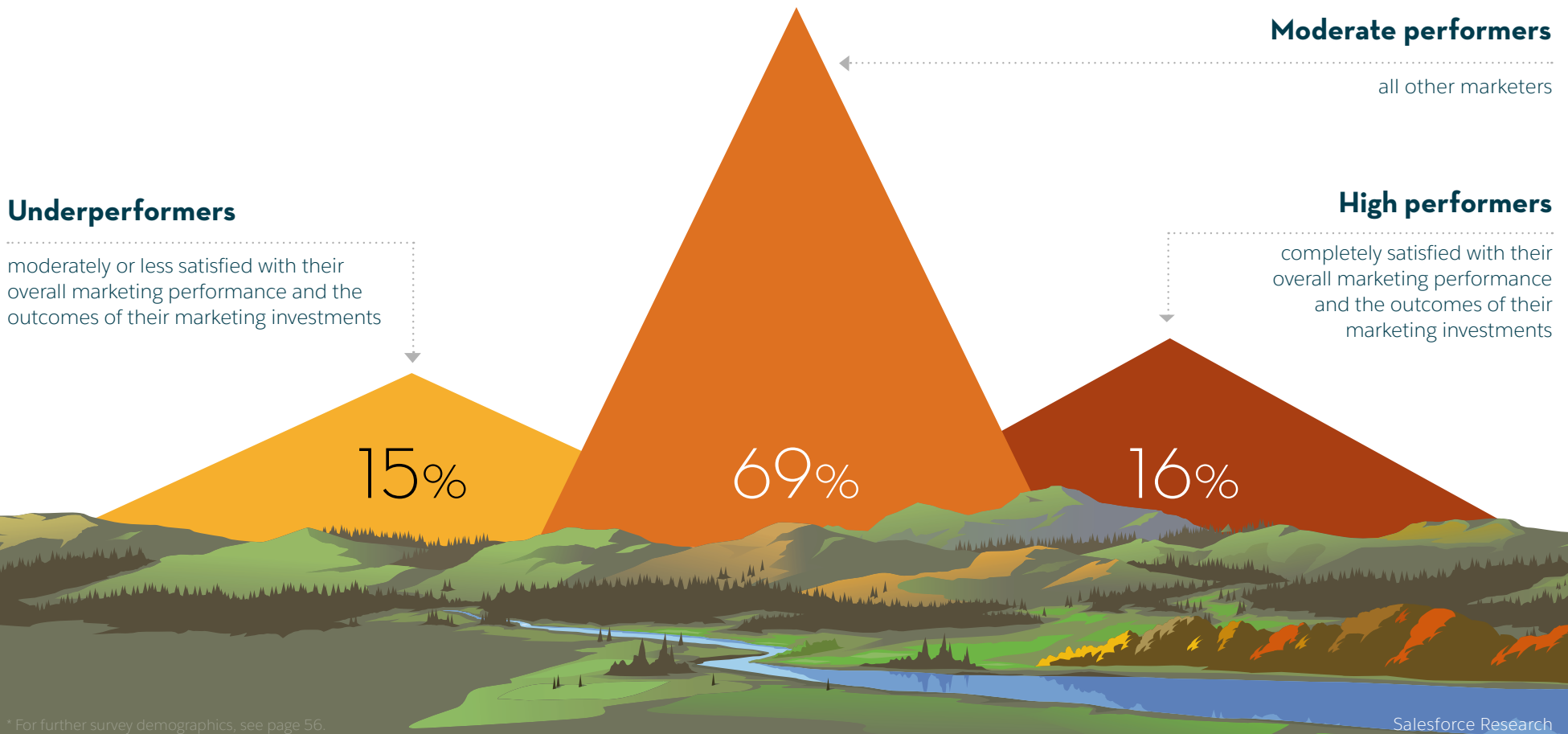
Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).

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

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About This Report

Breakdown of Marketing Performance Levels

High-performing marketing teams represent 16% of the overall survey population. Marketers surveyed include B2B, B2C, and B2B2C teams.*

Moderate performers

all other marketers

Underperformers

moderately or less satisfied with their overall marketing performance and the outcomes of their marketing investments

High performers

completely satisfied with their overall marketing performance and the outcomes of their marketing investments

15%

69%

16%

* For further survey demographics, see page 56.

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Contents

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Executive Summary

Today's marketers face a whole different landscape than their predecessors. As connected customer experiences become standard in customers' minds, marketers are expanding beyond their traditional purviews, tactics, and toolkits to meet expectations.

Here's an overview of how marketing is evolving in the Fourth Industrial Revolution.

01 | **Marketing Becomes the Cross-Functional Glue of Customer Experiences**
(See page 9)

The customer experience is far bigger than marketing. But with their perspectives of customer demands and behaviors, marketers are in a unique position to lead customer experience initiatives across the broader organization. **Fifty-two percent of marketers share metrics with sales teams.**

02 | **New Realities Up the Ante for Data Unification**
(See page 14)

Faced with rising expectations for personalization – along with a firehose of data – marketers are turning to new approaches to unify it all. **Marketers' average number of data sources has grown by 20% since 2017.**

03 | **AI and Trust Underpin Customer Experiences**
(See page 17)

The sophistication of data-driven personalization has come a long way over the years, and customers have come to expect it. Artificial intelligence (AI) is ushering in a new level of capabilities. But opaque policies around how it is used have sown customer confusion and distrust, handing marketers a new mandate to balance personalization and privacy. **Marketers' adoption of AI has grown at a rate of 44% since 2017.**

04 | **Marketers Strive for Real-Time Engagement Across Channels**
(See page 21)

Marketers continue to strive for real-time consumer engagement across channels. But as customers toggle between a dizzying number of channels, truly personalized engagement that adapts to customer behavior can be elusive. **Fifty-two percent of marketers engage customers in real time across one or more channels.**

Introduction
Marketers Contend with Customers' Ever-Rising Standards

With unprecedented choice and access to information, today's customers demand an overall experience that matches their standards for product quality.

80% of customers say the experience a company provides is as important as its products and services.*

In the Fourth Industrial Revolution, the definition of a "good" experience has changed. Customers demand not only relevant offers, but to feel truly known and understood as individuals. In a culture of immediacy, they also expect engagement at their exact moment of need. What's more, this level of engagement is viewed as standard across the *entire* customer journey, prompting marketers to think well beyond their traditional domain.

High-performing marketers set themselves apart by not only delivering the right message on the right channel at the right time, but by leading customer experience initiatives across their broader organizations.

Connected Customers Demand Intelligent Journeys

84%
83%

84%
of customers
say being treated like a person, not a number, is very important to winning their business*

54%
of high-performing marketing teams
lead customer experience initiatives across the business

■ Consumers   ■ Business Buyers

* "State of the Connected Customer," Salesforce Research, June 2018.

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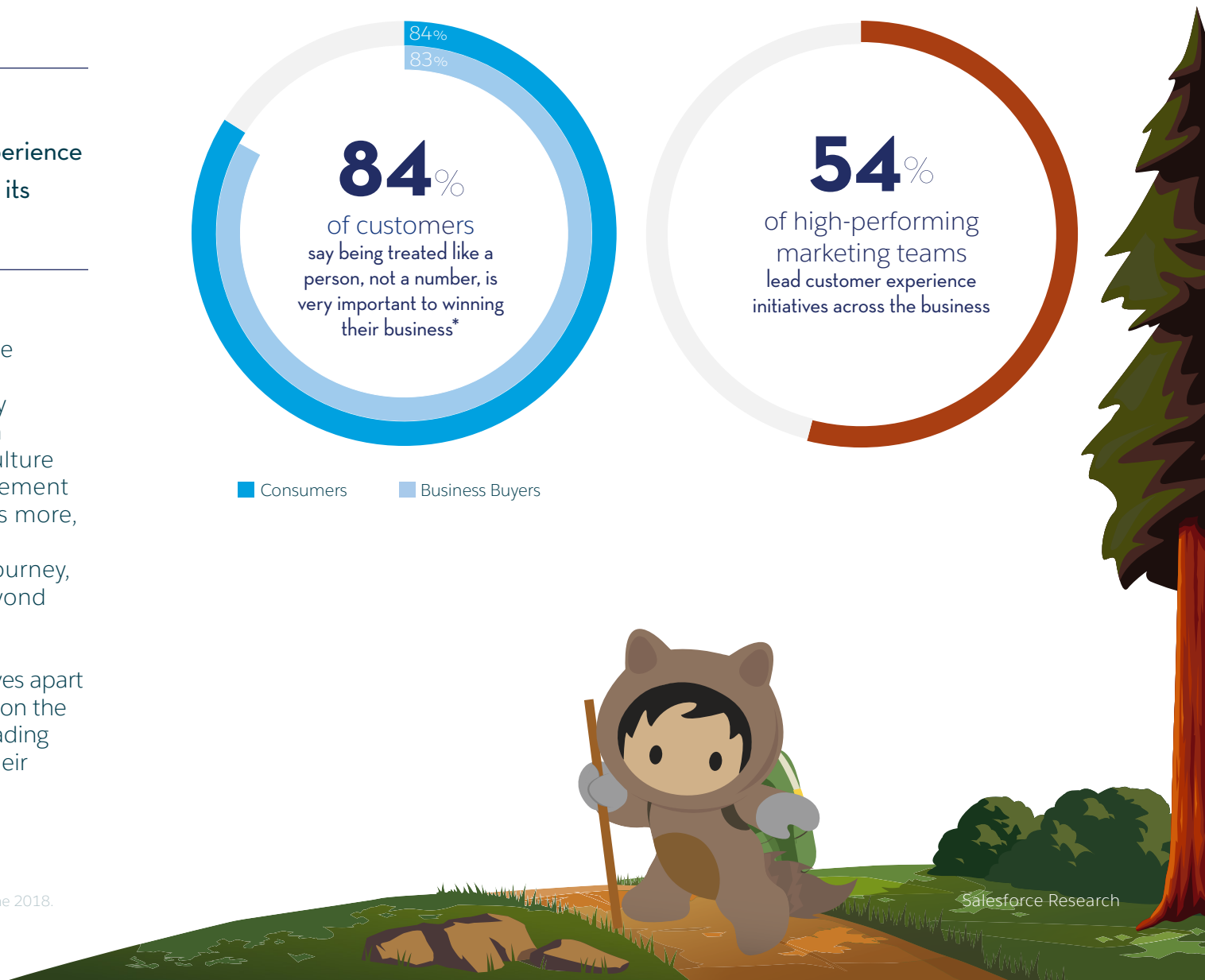
Introduction
Marketers Contend with Customers' Ever-Rising Standards

Marketers' top priorities speak volumes about their efforts to adapt to an always-evolving customer landscape. First and foremost, they're focused on engaging with customers and prospects in the real-time, conversational manner they expect, and to do so by allocating their scarce resources across the right touchpoints. To do this, they are also focused on upgrading their technology and unifying data sources to enable truly differentiated experiences across the full customer journey.

Real-time customer engagement is marketers' top priority — and their top challenge.

But marketers' top challenges stand directly in front of their objectives. Marketers are struggling to adapt to customers' rising expectations for a new level of engagement, and wrangling the technologies and data insights they need to make it possible. **Fewer than half (49%) of marketing leaders believe they provide an experience completely aligned with customer expectations.**

Marketers' Priorities and Challenges Are Two Sides of the Same Coin

Top Marketing Priorities

1 Engaging with customers in real time

2 Optimizing the marketing mix for best return

3 Modernizing tools and technologies

4 Creating a shared, single view of customers across business units

5 Unifying customer data sources

Top Marketing Challenges

1 Engaging with customers in real time

2 Adopting and effectively using new marketing technologies

3 Budgetary constraints

4 Creating a shared, single view of customers across business units

5 Creating a cohesive customer journey across disparate channels and devices

Introduction
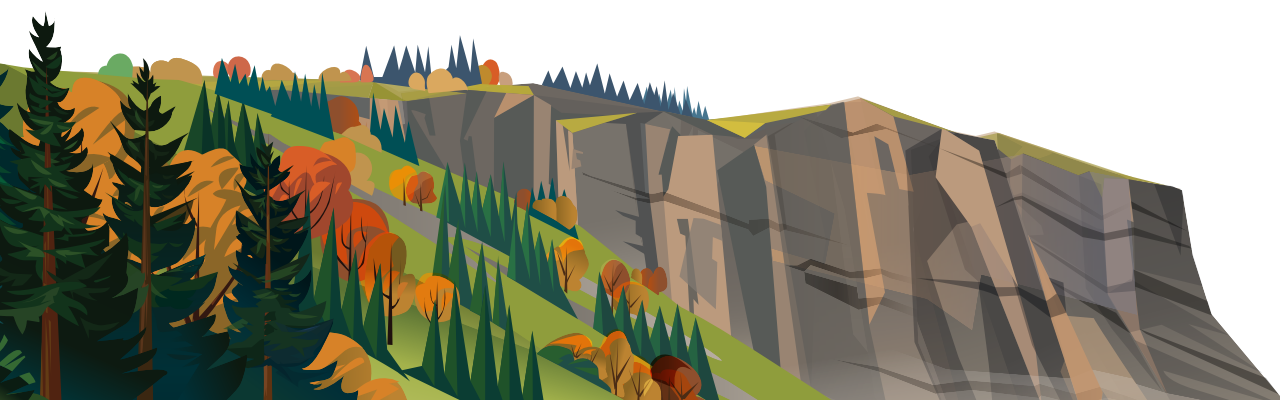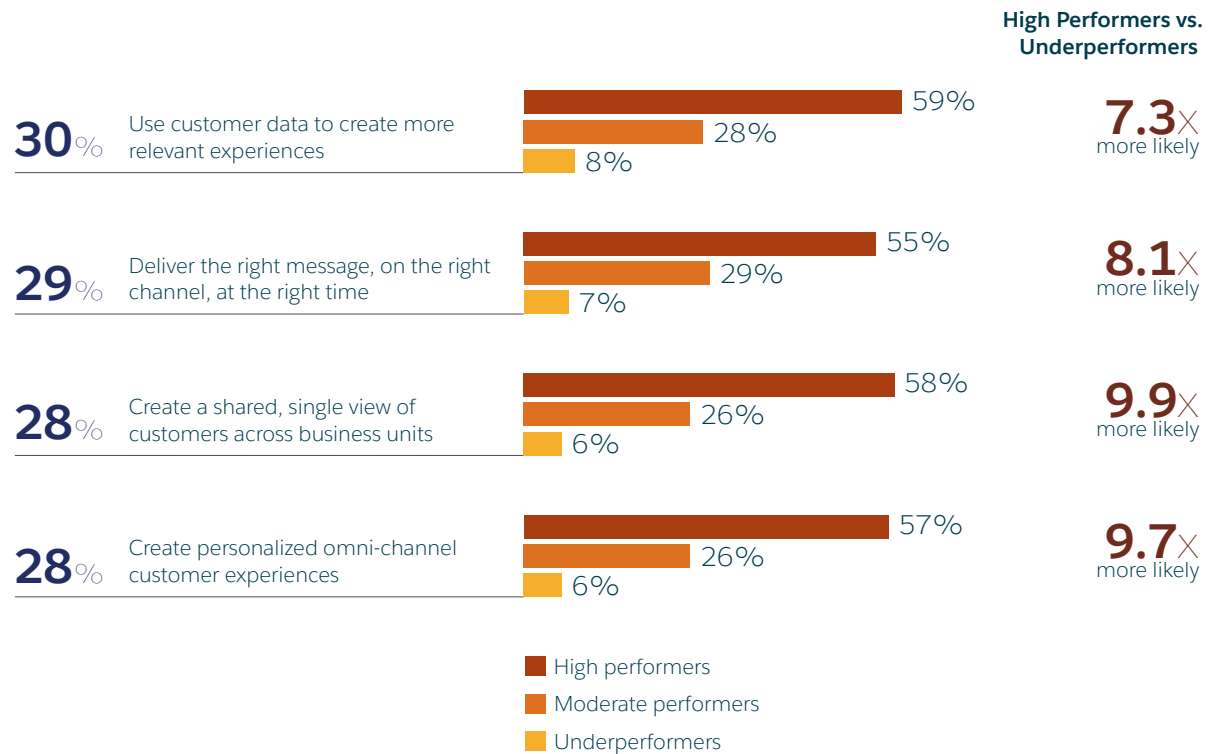## Marketers Contend with Customers' Ever-Rising Standards

High-performing organizations stand apart by embracing strategies that consider customers' *entire* journeys, and therefore enable truly personalized engagement.

56% of high-performing marketers are actively mapping the customer journey across the company, compared to 42% of underperformers.

These same high-performing marketers have managed, to a much a greater degree than their competitors, to foster collaborative relationships across their organizations, effectively apply customer data, and ultimately engage their customers and prospects in real time.

Top Marketers' Data Savviness Puts Their Personalization Capabilities in a League of Their Own

Percentage of Marketers Who Are Completely Satisfied with Their Ability to Do the Following

High Performers vs. Underperformers

30% Use customer data to create more relevant experiences
- High performers: 59%
- Moderate performers: 28%
- Underperformers: 8%

7.3x more likely

29% Deliver the right message, on the right channel, at the right time
- High performers: 55%
- Moderate performers: 29%
- Underperformers: 7%

8.1x more likely

28% Create a shared, single view of customers across business units
- High performers: 58%
- Moderate performers: 26%
- Underperformers: 6%

9.9x more likely

28% Create personalized omni-channel customer experiences
- High performers: 57%
- Moderate performers: 26%
- Underperformers: 6%

9.7x more likely

■ High performers
■ Moderate performers
■ Underperformers

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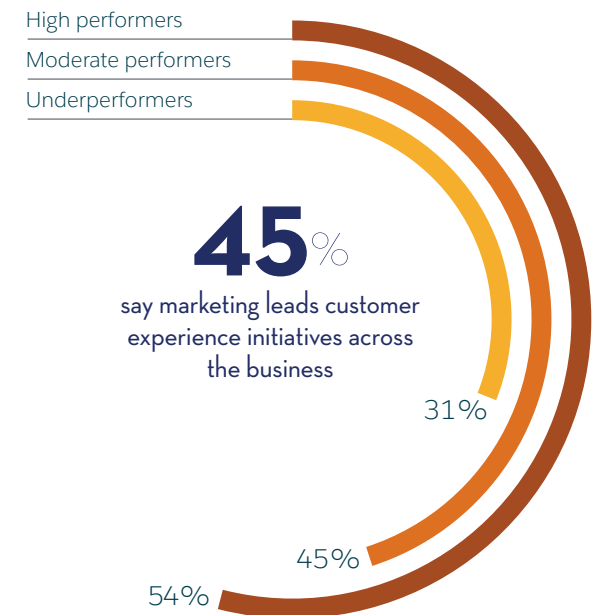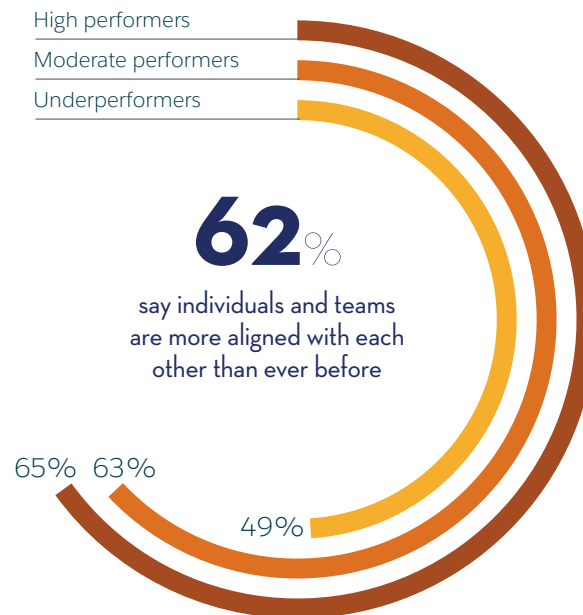# 01 Marketing Becomes the Cross-Functional Glue of Customer Experiences

Marketers have a unique perspective of customer needs, behaviors, and trends. As such, **nearly half (45%) of marketing leaders say their organization is leading customer experience initiatives across the business, up from 24% who strongly agreed with this sentiment in 2017.** Among high-performing teams, this figure rises to 54%. To operate successfully in this new day and age, marketers are fundamentally rethinking how they work both within and outside of their traditional purviews.

Integrated objectives and workflows across disparate departments are key to this leadership, but the best marketers know improvement starts from within. Nearly two-thirds (62%) of marketing leaders say that individuals and teams within their organization are more aligned with *each other* than ever before. In other words, marketers are increasingly focused on supporting and complementing each other's work to drive cohesive customer journeys, rather than focusing exclusively on their own channels or functions.

65% of marketing leaders say all team members within their organization share common goals and metrics.

Top Marketing Teams Operate as a Unified Front

Percentage of Marketers Who Say the Following About Their Marketing Organization

High performers
Moderate performers
Underperformers

62%
say individuals and teams are more aligned with each other than ever before

65% 63%
49%

High performers
Moderate performers
Underperformers

45%
say marketing leads customer experience initiatives across the business

31%
45%
54%

Advertising Unites with the Broader Marketing Organization

Historically, paid advertising has been stuck in organizational and technological silos. Today, advertising teams are joining the wider marketing fold. In fact, 87% of marketing teams with internal advertising colleagues share integrated technology stacks, underscoring the importance of unifying data to create the right experience on the right channel at the right time. **Fifty-five percent of marketing teams collaborate with advertising teams when evaluating new technology.**

But technology alignment is the tip of the iceberg, with marketers and advertisers also aligning their overall objectives and resources. Sixty-one percent of marketers share common goals and metrics with their advertising colleagues, and more than half share a single brand or creative team.
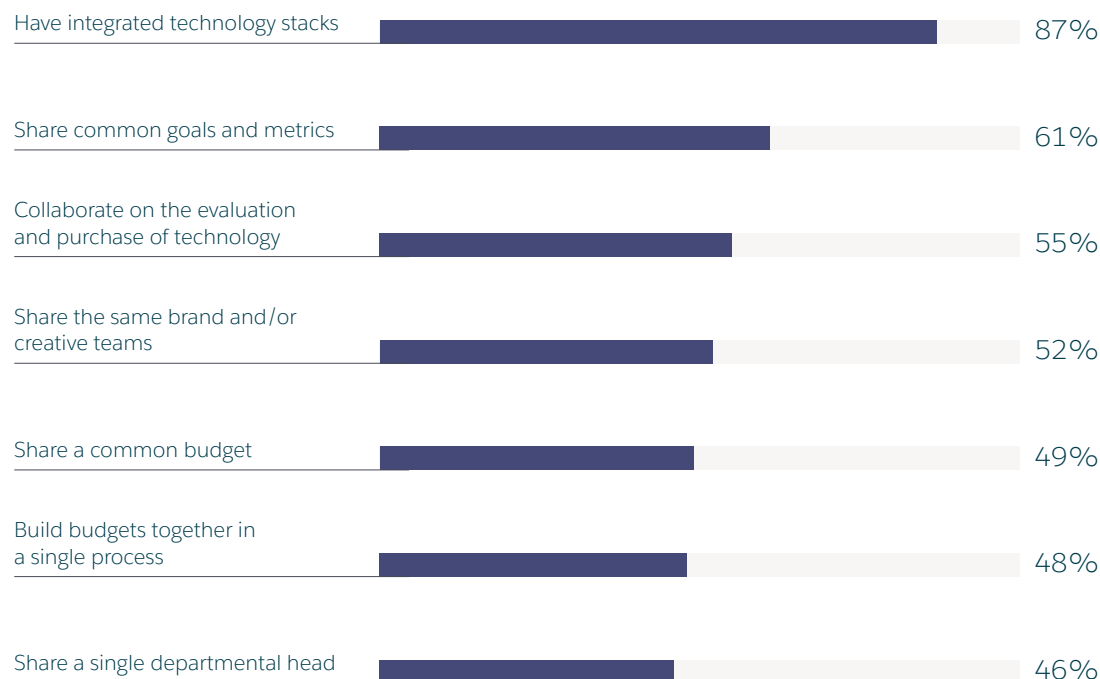
Budgeting remains a largely separate endeavor for marketing and advertising teams, perhaps because fewer than half of these teams share a single departmental head.

93% of high performers have integrated marketing and advertising technology stacks versus 69% of underperformers.

55% of high performers build budgets with their advertising teams versus 40% of underperformers.

Ad Teams No Longer Operate in Silos

Percentage of Marketers Who Say They Do the Following with Advertising Teams

Have integrated technology stacks — 87%

Share common goals and metrics — 61%

Collaborate on the evaluation and purchase of technology — 55%

Share the same brand and/or creative teams — 52%

Share a common budget — 49%

Build budgets together in a single process — 48%

Share a single departmental head — 46%

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01 Marketing Becomes the Cross-Functional Glue of Customer Experiences

Customers see one company – not separate departments. As customer experience leaders, marketers must look outside their hallowed walls for new opportunities to drive superior engagement.
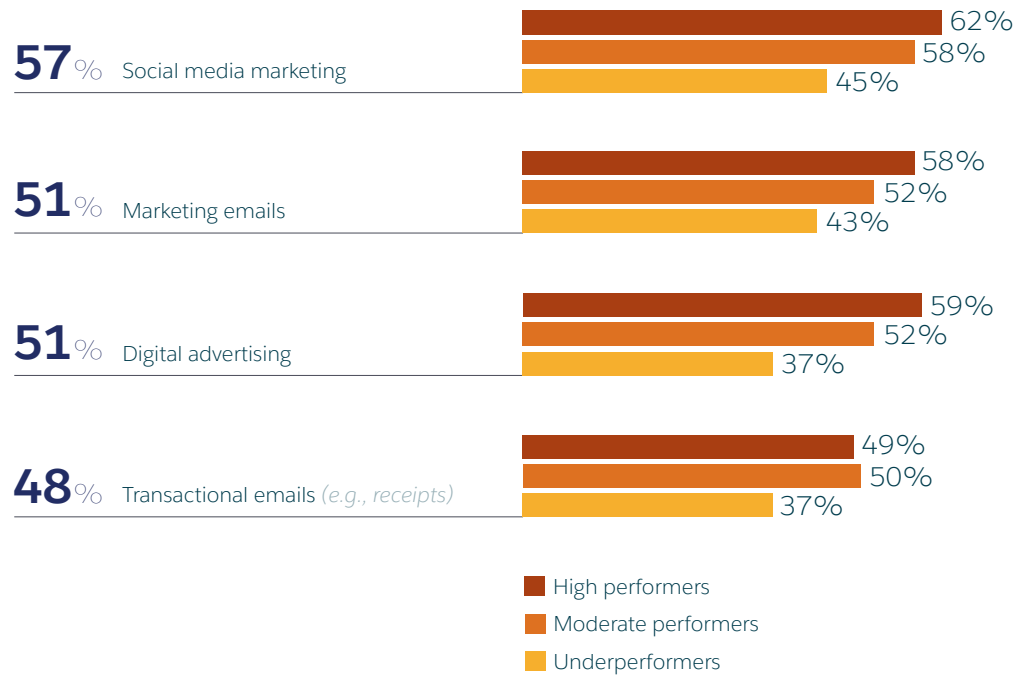
Take, for example, the opportunity to create true cross-channel shopping experiences that connect ecommerce, brick-and-mortar stores, and individual-level marketing. Marketers are increasingly connecting the path to purchase by syncing commerce system activity with social media, marketing emails, and more.

Despite their increasing connectivity, only 46% of marketers claim a free and open flow of customer data between marketing and commerce teams. Indeed, enhanced technology must be paired with the right workflows and collaboration to realize its full benefits.

50% of marketing and commerce teams share common goals and metrics.

Marketing and Commerce Technology Are Increasingly Connected

Percentage of Marketing Organizations That Have Synced Commerce Systems with the Following

57% Social media marketing
- 62%
- 58%
- 45%

51% Marketing emails
- 58%
- 52%
- 43%

51% Digital advertising
- 59%
- 52%
- 37%

48% Transactional emails *(e.g., receipts)*
- 49%
- 50%
- 37%

■ High performers
■ Moderate performers
■ Underperformers

Base: Respondents whose marketing organization uses a commerce system and the channel or system indicated.

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01 Marketing Becomes the Cross-Functional Glue of Customer Experiences

Sales and marketing alignment is hardly a new concept. But as increasingly sophisticated customer experiences elevate consumers' expectations, standards are rising for business purchases, too. Therefore, it's critical for *all* sales and marketing to march in tandem.

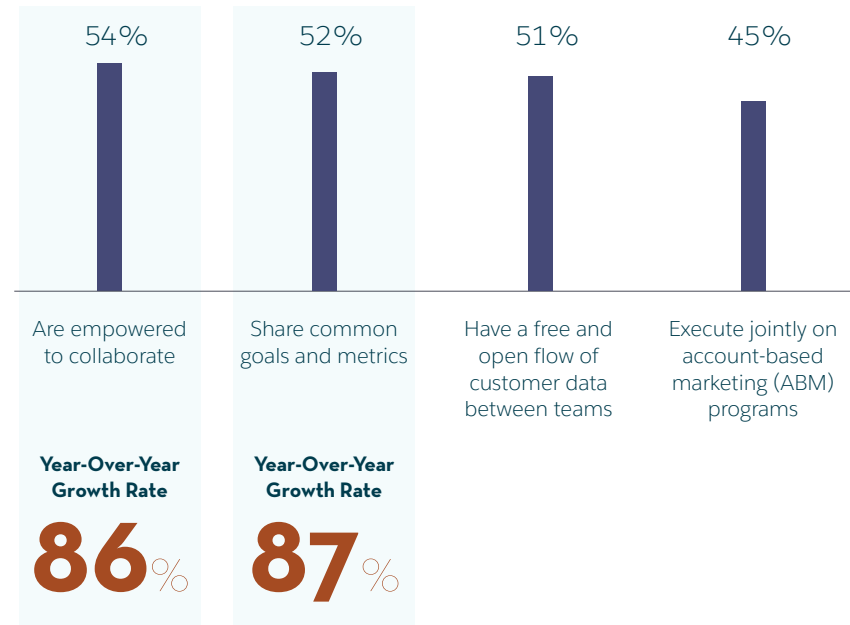**69**% of business buyers expect Amazon-like buying experiences — such as personalized recommendations.*

A slight majority of marketing teams with direct selling models now share common goals and metrics with their sales colleagues. A similar number enjoys a free and open flow of customer data between the teams.

Although marketers' focus on a unified customer view theoretically puts account-based marketing (ABM) strategies within reach, they remain the exception to the rule. **High-performing marketers are 1.5x more likely than underperformers to collaborate with sales teams on ABM programs.**

Sales and Marketing Alignment Is the Default

Percentage of B2B Marketers Who Say They Do the Following with Sales Teams

54%	52%	51%	45%
Are empowered to collaborate	Share common goals and metrics	Have a free and open flow of customer data between teams	Execute jointly on account-based marketing (ABM) programs

| **Year-Over-Year Growth Rate** **86**% | **Year-Over-Year Growth Rate** **87**% | | |

Note: 2017 data is based on responses of "strongly agree" on a five-point scale, whereas 2018 data is based on responses of "yes" on a binary scale.

Base: B2B or B2B2C marketers.

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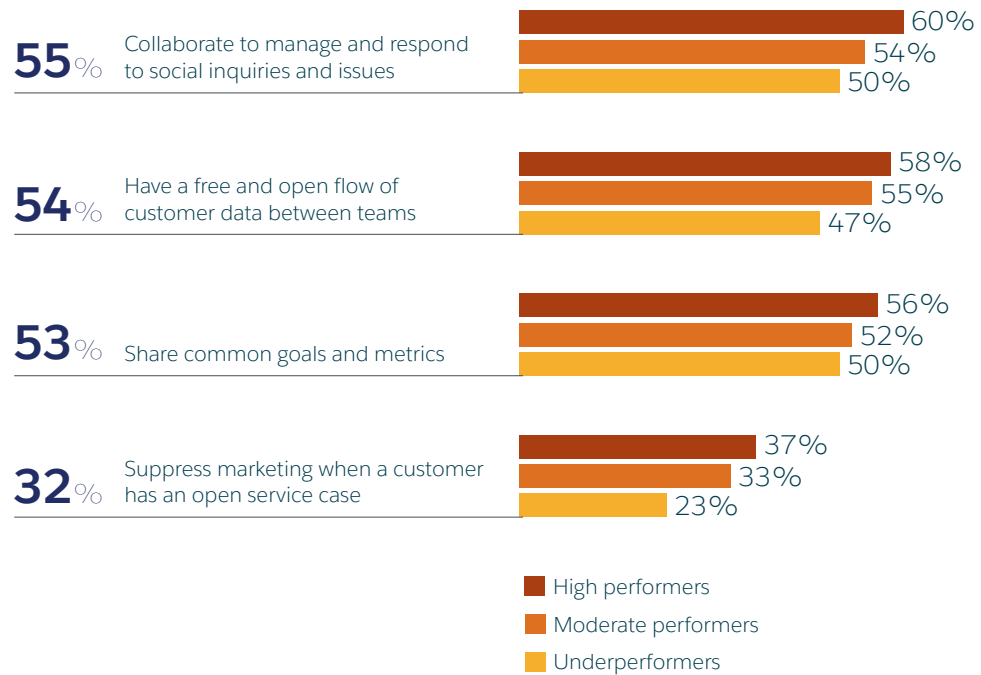# 01 Marketing Becomes the Cross-Functional Glue of Customer Experiences

Once viewed as unrelated departments on opposite ends of the sales cycle, there's now evidence that marketing and customer service teams are operating as extensions of each other. For instance, roughly six in 10 marketing teams now track customer satisfaction and retention, and **53% of marketing teams share common goals and metrics with service teams.**

55% of marketing teams collaborate with service teams to manage and respond to inquiries and issues over social media.

However, marketing and service alignment hasn't yet reached peak sophistication. Case in point: Only about one-third of marketing teams suppress messages to potentially unhappy customers with open service issues – although this has risen from 21% in 2017.

Marketing and Service Teams Are Bridging Gaps Along the Customer Journey

Percentage of Marketers Who Say They Do the Following with Service Teams

55% Collaborate to manage and respond to social inquiries and issues
- 60%
- 54%
- 50%

54% Have a free and open flow of customer data between teams
- 58%
- 55%
- 47%

53% Share common goals and metrics
- 56%
- 52%
- 50%

32% Suppress marketing when a customer has an open service case
- 37%
- 33%
- 23%

- High performers
- Moderate performers
- Underperformers

Note: 2017 data is based on responses of "strongly agree" on a five-point scale, whereas 2018 data is based on responses of "yes" on a binary scale.

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Marketers are turning to myriad types and sources of data – from email open rates to web activity to demographics – to paint vivid pictures of customers' and prospects' unique needs, preferences, and behaviors. In fact, the median number of data sources used by marketers is forecasted to jump from 12 in 2018 to 15 in 2019. The use of second-party data – that which is shared between consenting parties like brands and publishers to extend audiences and refine targeting – has seen a 19% growth rate since 2017.

Merely *collecting* data from different sources isn't enough, however, as disconnected data paints an incomplete picture at best. **Only 47% of marketers say they have a completely unified view of customer data sources.** Marketers across performance tiers differ on how urgent they believe data unification is, as well as the steps they're taking to address it.

High Performers vs. Underperformers

7.3x more likely to be completely satisfied with their ability to use data to create more relevant experiences

Data Sources Proliferate as Marketers Seek to Understand Customers and Prospects

Median Number of Data Sources Used by Marketing Organizations

2017   10
2018   12
2019   15

Percentage of Marketing Organizations Using Second-Party Data

2017   58%
2018   69%

O2 New Realities Up the Ante for Data Unification
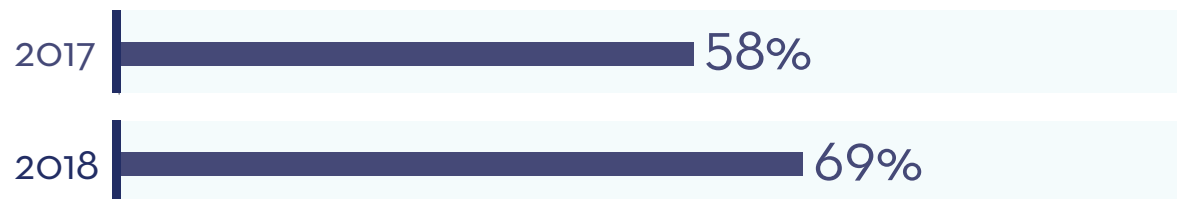
Even after established data sources are unified, the deluge of data sources presents a vexing problem for marketers. Multiple email addresses, social activity, web activity, ecommerce and point-of-sale transactions, and service engagements – just to name a few – make piecing together a unified view of the individual customer easier said than done. For top teams, in particular, defining the solutions and workflows to solve this issue of customer identity is an urgent matter.

High Performers vs. Underperformers

1.7 x more likely to consider the ability to solve for unique identities as a critical marketing technology requirement

Different technology solutions have emerged to solve for unique identities. But these technologies are traditionally owned and administered by different departments – such as ESPs and DMPs owned by marketing departments and CRMs and databases owned by sales and IT departments. As a result, no default solution for customer identity has emerged. In fact, the average marketing department leans on three different technologies for this purpose.

Marketers Turn to a Hodgepodge of Technologies to Solve for Customer Identity

Most Common Technologies Used for Customer Identity Purposes

1 Marketing database

2 Customer relationship management (CRM) system

3 Email service provider (ESP)

4 Data management platform (DMP)

5 Customer data platform (CDP)

6 Homegrown solution

7 Marketing automation platform

Note: Respondents were only shown a technology if they reporting using the the indicated technology. The base includes all respondents.

SPOTLIGHT

Marketers Look Beyond Media Buying as DMP Use Evolves

Given DMPs' historical roots in advertising, much of their business value has focused on media buying and ad frequency capping. However, 55% of marketing leaders *outside* of advertising now report using a DMP, and another 35% plan to use one within the next two years. The technology's applications have evolved and expanded accordingly.

Marketers expect their use of DMPs to increase by 64% by 2020.

Media buying ranks below marketing analytics and content personalization on the list of most common DMP use cases. Significant numbers of DMP users also employ the technology to resolve and manage customer identity and test and optimize creative work. Planned use cases signal a continued evolution of how DMPs are used, with audience insights projected to see the largest growth.

DMP Use Cases Transcend Media Buying

Top 5 Current DMP Use Cases

1 | Marketing analytics and advertising performance

2 | Content personalization

3 | Media buying and optimization

4 | Identity resolution and management

5 | Creative testing and optimization

Top 5 Planned DMP Use Cases

1 | Audience insights

2 | Audience discovery and segmentation

3 | Identity resolution and management

4 | Creative testing and optimization

5 | Content personalization

Base: Respondents whose marketing organization uses or plans to use a DMP.
See page 55 for full DMP use case data.

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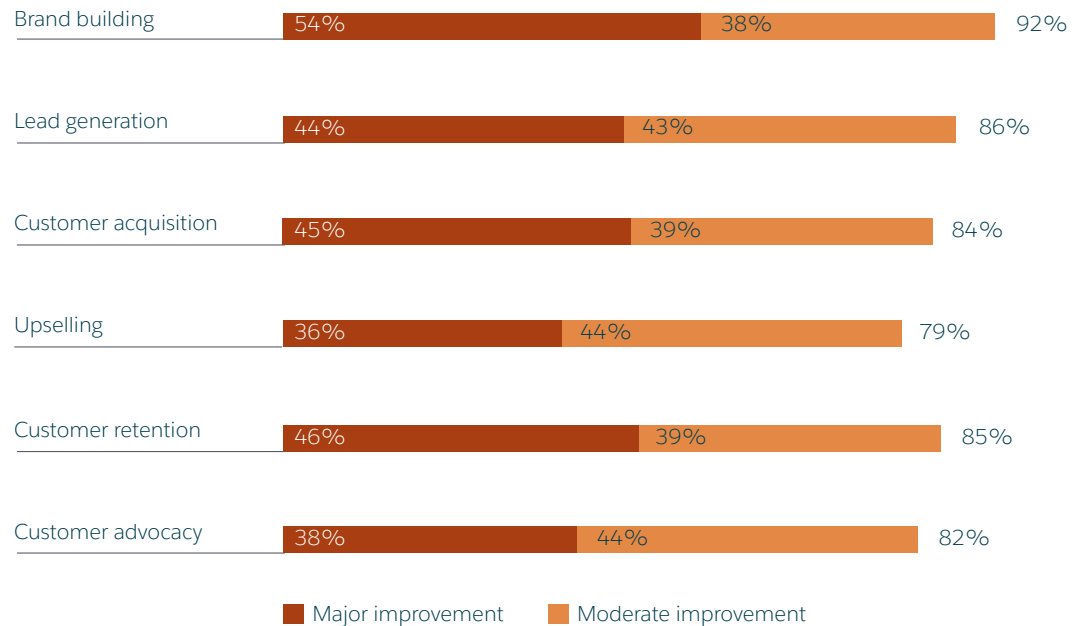# 03 AI and Trust Underpin Customer Experiences

As technology advances, marketers have unprecedented ability to scale and personalize their programs through AI. But opaque data use policies have weakened the trust of many consumers. Still, personalization is a treasured commodity. In fact, 79% of customers are willing to share data in exchange for contextualized engagement, and 88% will do so for personalized offers.*

Marketers report that personalization improves lead generation, customer acquisition, and upselling – and they're also seeing improvements across the rest of the customer journey. For instance, 82% of marketing leaders credit personalization with a major or moderate boost in customer advocacy, and 92% say the same for its impact on brand building.

Marketing teams' ability to personalize the customer journey has become a marker of success. **High-performing marketers are 9.7x more likely than underperformers to be completely satisfied with their ability to personalize omni-channel experiences.**

Marketers Report Personalization ROI Across the Customer Journey

Percentage of Marketers Who Say Personalization Improves the Following

Category	Major improvement	Moderate improvement	Total
Brand building	54%	38%	92%
Lead generation	44%	43%	86%
Customer acquisition	45%	39%	84%
Upselling	36%	44%	79%
Customer retention	46%	39%	85%
Customer advocacy	38%	44%	82%

■ Major improvement   ■ Moderate improvement

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O3 AI and Trust Underpin Customer Experiences

Personalization has come a long way since the days when emails addressing customers by name were noteworthy. Today, 62% expect companies to *anticipate* their needs.*

Teams are increasingly turning to new technologies that help them engage in a more relevant manner. For example, 29% of marketers now use AI (up from 20% who used the technology extensively in 2017) through use cases like personalized email offers based on web browsing behavior.

Some marketers are also using – or experimenting with – other intelligent technologies. Forty-four percent of marketers use connected devices (up from 29% who used them extensively in 2017), including the 32% with voice-activated personal assistants like Alexa and Siri in their kit of parts. Twenty-four percent use virtual or augmented reality – such as apps that allow homebuyers to calculate mortgage costs by pointing their phone at a house or "try on" a shade of makeup without setting foot in a store.
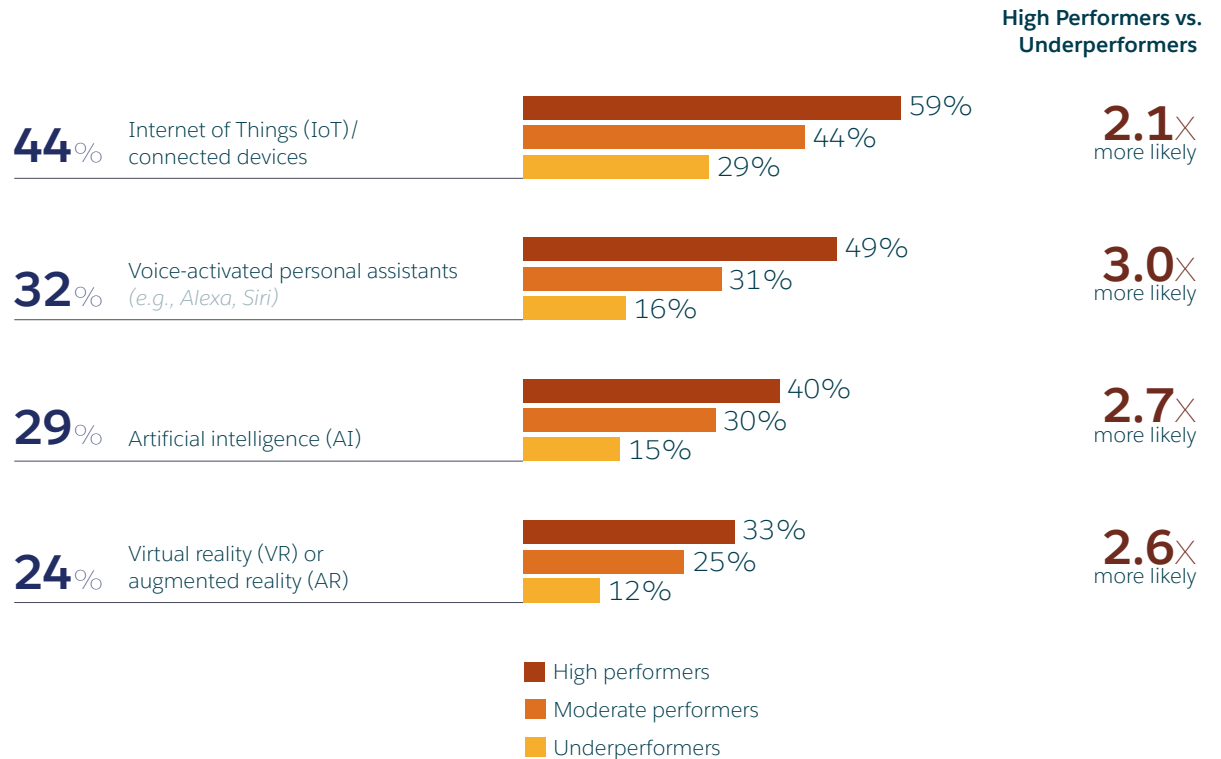
Marketers' adoption of AI has grown by 44% since 2017.

AI and Other Advanced Technologies Broaden Marketers' Toolkits

Percentage of Marketing Organizations Using the Following Technologies

High Performers vs. Underperformers

44% Internet of Things (IoT)/ connected devices — 59% / 44% / 29% — **2.1**x more likely

32% Voice-activated personal assistants *(e.g., Alexa, Siri)* — 49% / 31% / 16% — **3.0**x more likely

29% Artificial intelligence (AI) — 40% / 30% / 15% — **2.7**x more likely

24% Virtual reality (VR) or augmented reality (AR) — 33% / 25% / 12% — **2.6**x more likely

■ High performers
■ Moderate performers
■ Underperformers

Note: 2017 data is based on responses of "currently use extensively" on a four-point scale, whereas 2018 data is based on responses of "currently use" on a three-point scale.

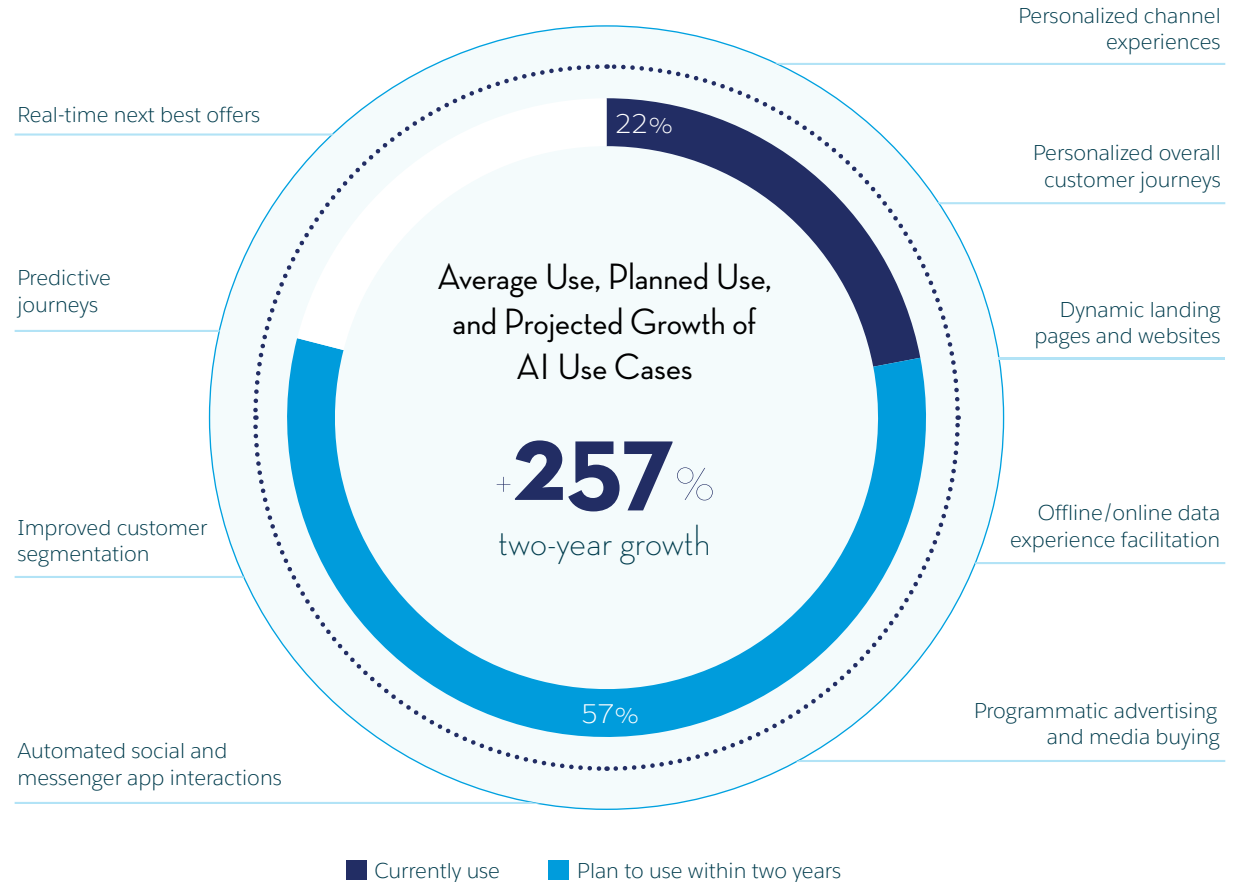* "State of the Connected Customer," Salesforce Research, June 2018.

AI Goes to Work Across a Range of Marketing Activities

Like most business leaders, marketing leaders have been contemplating the implications of AI for the past several years – but no dominant use case for the technology has taken hold.

Marketers' AI applications are widespread, with roughly the same number of them leveraging the technology for personalization and next best offers as those using it to automate customer interactions or bridging the online/offline divide.

But if marketers are only dipping their toes into AI now, they're planning on taking the plunge soon.

Marketers Are Experimenting with AI in an Assortment of Ways

Real-time next best offers

Predictive journeys

Improved customer segmentation

Automated social and messenger app interactions

Personalized channel experiences

Personalized overall customer journeys

Dynamic landing pages and websites

Offline/online data experience facilitation

Programmatic advertising and media buying

Average Use, Planned Use, and Projected Growth of AI Use Cases

+**257**%
two-year growth

22%

57%

■ Currently use   ■ Plan to use within two years

Base: Marketers currently using AI or planning to use AI.
See page 54 for full AI use case data.

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As their capabilities ramp up, marketers face increasing scrutiny from customers and regulators alike. But personalization is treasured by customers. In fact, 78% of them are more likely to trust companies with personal information if it's used to fully personalize their experience.*

What's key, according to customers, is transparency into how data is used, and marketers are responding accordingly. **Fifty-one percent of marketing teams say they're more mindful about balancing personalization and privacy than they were two years ago.**

High Performers vs. Underperformers

7.1 X more likely to be completely satisfied with their ability to balance personalization with privacy

Yet only 30% of marketers are completely satisfied with their ability to balance personalization with privacy, and one-third of marketers admit that it's difficult to meet regulatory obligations (like those specified by the European Union's GDPR). It's little surprise, then, that only 44% of marketers differentiate themselves by going beyond what's required by law or industry standards.

* "Trends in Customer Trust," Salesforce Research, September 2018.

Marketers Take Trust and Privacy to Heart, but Some Struggle to Deliver

Percentage of Marketers Who Agree with the Following

Our marketing organization is more mindful about balancing personalization and privacy than two years ago	51%
Our brand goes beyond regulations and/or industry standards to protect and respect customer privacy	44%
Balancing personalization and privacy is a challenge	35%
Complying with regional and/or local privacy regulations is a challenge	33%
Our marketing organization is completely satisfied with our ability to balance personalization with privacy	30%

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O4   Marketers Strive for Real-Time Engagement Across Channels

A website is a brand's window to the world, so it's logical that marketers see it as critical across the entire customer journey. Which channels work best alongside the website is more hotly contested.

Across every stage of the customer journey, social marketing – be it organically published or paid advertising – is highly valued. Once a customer relationship has been established – from the acquisition stage onward – tried-and-true email marketing remains a keystone in effective direct engagement. As things from billboards to TVs become more connected, the IoT becomes more important for brand building. And in a world of increasing noise, customer communities are invaluable assets that can help drive ROI.

As mobile web traffic increases, apps become more important, and 65% of advertisers are increasing their spend on video. The question of how to optimize channel choice is becoming more complex, not simpler.*

Social and Email Generate Results Across the Customer Journey

Channels with the Highest ROI Across the Customer Journey

Website +

BRAND BUILDING
Social*

IoT

Video advertising

LEAD GENERATION
Social*

Customer communities

Paid search / SEM

CUSTOMER ACQUISITION
Customer communities

Social*

Email

UPSELLING
Email

Affiliate marketing

Social*

CUSTOMER RETENTION
Customer communities

Email

Social*

CUSTOMER ADVOCACY
Customer communities

Social*

Email
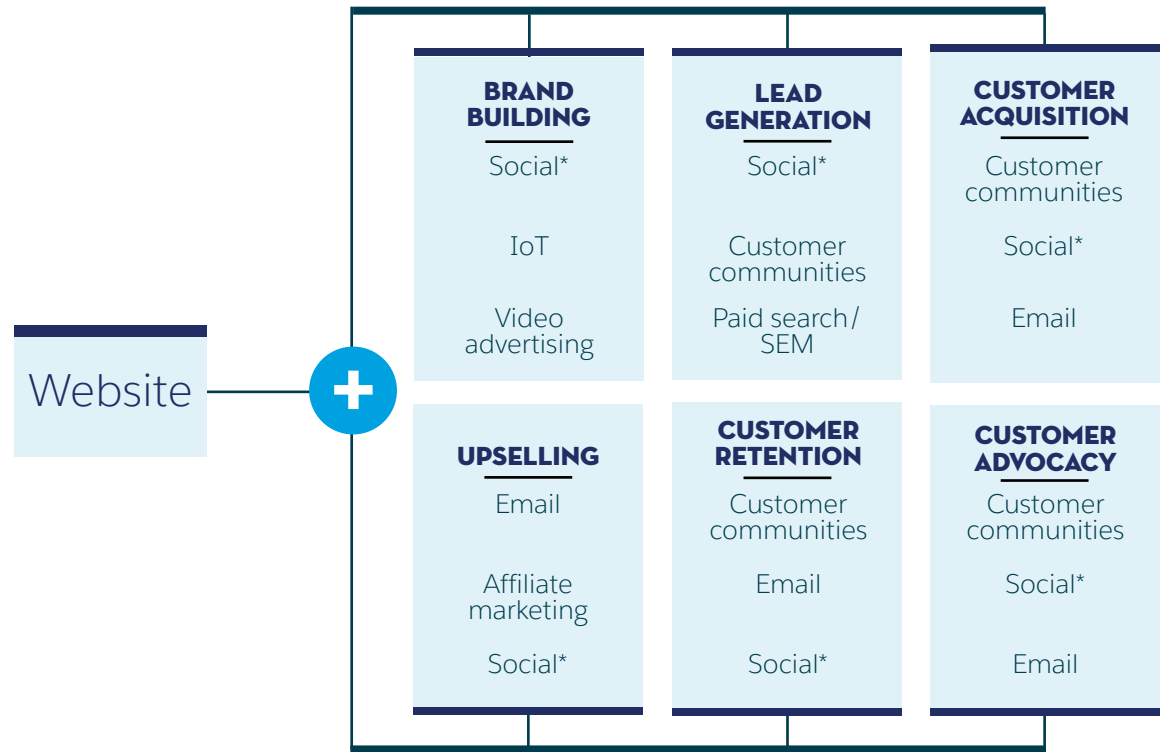
* "Digital Advertising 2020," Salesforce Research, January 2018.

Base: Marketers currently using the indicated channel.
* Social includes combined responses of social advertising and social publishing.

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04 Marketers Strive for Real-Time Engagement Across Channels

Regardless of channel, the concept of waiting is disappearing. Expectations for real-time engagement now include much more than prompt responses over social media. Today's real-time benchmarks bridge the offline and online divide – for example, a kiosk serves an ad based on a smartphone's proximity or an ATM serves an offer based on an in-process transaction.

Real-time engagement is now marketers' top priority, but it also ranks as marketers' top challenge. Similarly, several other top marketing challenges involve effectively using new marketing technologies and connected views of customer data to make this engagement a reailty.

High Performers vs. Underperformers

1.9x more likely to engage customers in real time across one or more channels

Two-way engagement – in which marketers adjust strategy and tactics based on customer feedback – is now commonplace, and providing marketers with new insights to better engage their targets. **Fifty-two percent of marketers adapt marketing strategy and tactics based on customer interactions.**

Real-Time and Two-Way Engagement Go Mainstream

Percentage of Marketers Who Say the Following About Their Marketing Organization

High performers
Moderate performers
Underperformers

52%
We engage customers in real time across one or more marketing channels

33%
62%
54%

High performers
Moderate performers
Underperformers

52%
We adapt marketing strategy and tactics based on customer interactions

52%
57%
50%

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SPOTLIGHT
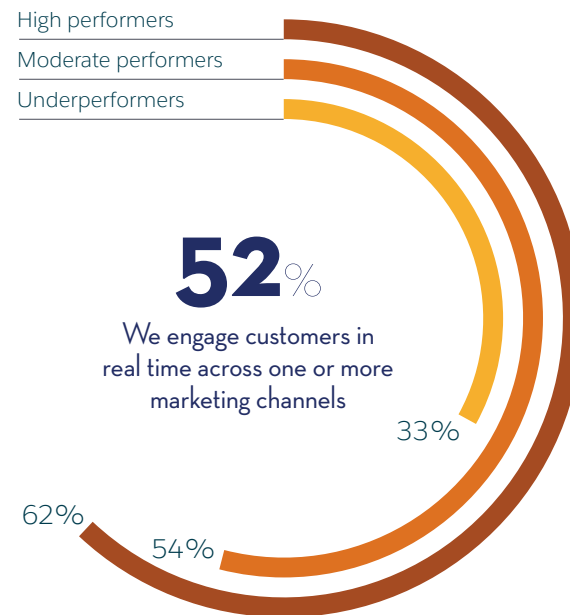
As Channels Multiply, Connections Between Them Remain Elusive

Solving the omni-channel puzzle is as critical as ever, but more channels means the risk of discord between them is high. **Only 28% of marketers are completely satisfied with their ability to engage customers across channels at scale.**

Marketers' ability to engage dynamically across channels – or evolve from channel to channel based on customer actions – is nascent. On average, only 32% of marketing leaders say a given channel is dynamically coordinated with others, up from 28% in 2017.

Rates of duplicate channel coordination – where identical messages are broadcast across channels – have dropped from an average of 51% in 2017 to 39% today. But that doesn't mean marketers are moving uniformly in the right direction. In fact, the average rate of siloed channels jumped from 21% in 2017 to 29% today. In other words, more marketers are meeting customers' elevated expectations for cross-channel engagement, but even more are falling short of them.

36% of high-performing marketers dynamically coordinate channels on average, versus 26% of underperformers.

The Gap Grows Between Dynamic and Siloed Messages

Percentage of Marketers Who Describe Their Cross-Channel Coordination as Follows
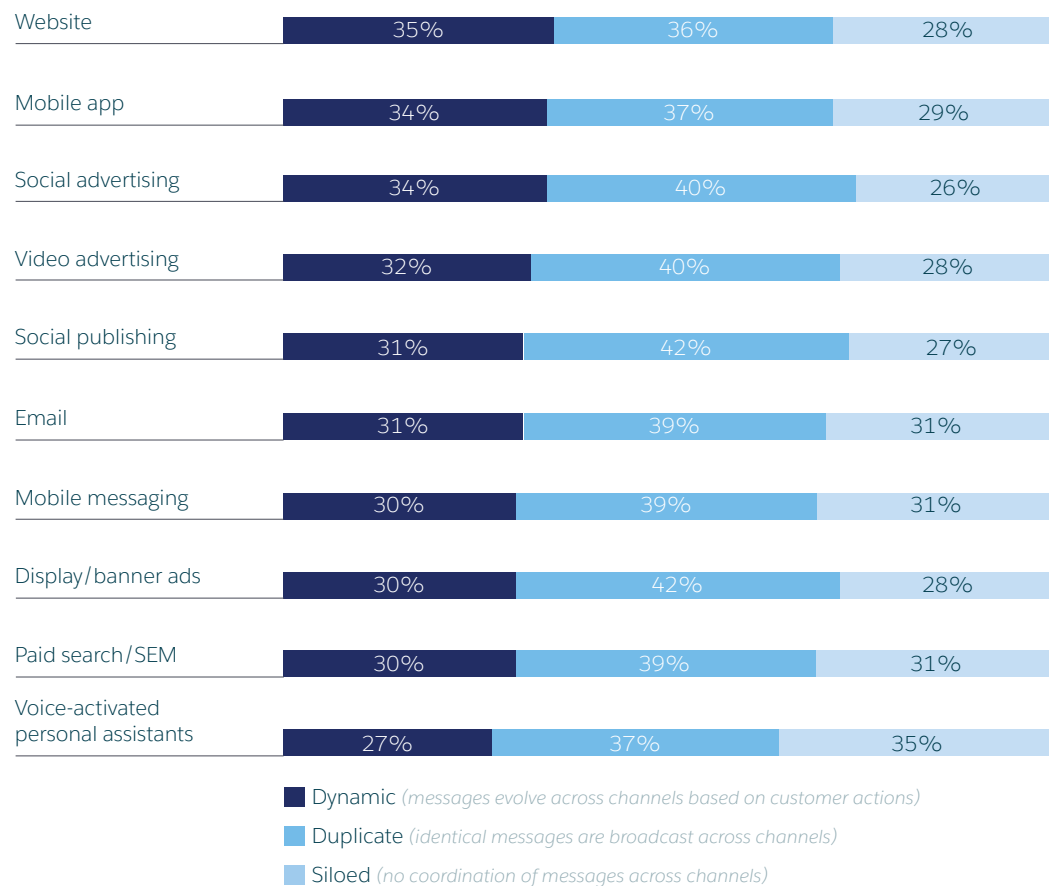
Channel	Dynamic	Duplicate	Siloed
Website	35%	36%	28%
Mobile app	34%	37%	29%
Social advertising	34%	40%	26%
Video advertising	32%	40%	28%
Social publishing	31%	42%	27%
Email	31%	39%	31%
Mobile messaging	30%	39%	31%
Display/banner ads	30%	42%	28%
Paid search/SEM	30%	39%	31%
Voice-activated personal assistants	27%	37%	35%

■ Dynamic *(messages evolve across channels based on customer actions)*

■ Duplicate *(identical messages are broadcast across channels)*

■ Siloed *(no coordination of messages across channels)*

Base: Marketers currently using indicated channel.

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Marketers Revamp Metrics and Measurement for a New Era

While established metrics like revenue growth will never go away, increased focus on customer experience and journeys is prompting marketers to look beyond traditional measures of success.

Sixty percent of marketers now track customer satisfaction metrics such as net promoter score (NPS), for example, and nearly as many track customer retention rates – recognizing the comparative value of a return customer versus a new lead. Forty-three percent take it a step further by tracking customers' overall lifetime value.

Marketers are also increasingly scrutinizing how they can find their best customers, and how much it costs to do so. For instance, 52% now keep tabs on how much and often they receive referrals from customers, and 51% analyze how much it costs to acquire a given customer. Many marketers are also tracking data that can give a more granular look at how and why specific channels perform, such as the 49% who now track mobile analytics.

Percentage of Marketing Organizations That Track the Following Metrics

Revenue growth — 74%

Sales effectiveness *(e.g., sales cycle time, sales team performance, sales team response time, direct involvement in sales opps, etc.)* — 64%

Web traffic and/or analytics *(e.g., page views, pages per visit, time on page, bounce rate)* — 61%

Customer satisfaction metrics — 60%

Customer retention rates — 59%

Customer acquisition rates — 58%

Marketing qualified leads metrics *(e.g., MQLs, SQLs)* — 55%

Digital engagement rates *(e.g., opens, clicks, downloads)* — 54%

Social analytics *(e.g., reach and engagement via likes, tweets, shares, etc.)* — 54%

Customer referral rates/volume — 52%

Customer acquisition cost (CAC) — 51%

Mobile analytics *(e.g., mobile traffic, mobile lead conversions, etc.)* — 49%

Lifetime customer value — 43%

High Performers vs. Underperformers

1.4x more likely to track customer satisfaction

High Performers vs. Underperformers

1.9x more likely to track customer lifetime value

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Last Look
Marketers Revamp Metrics and Measurement for a New Era

Success measures aren't the only thing that needs revamping.

High-performing marketers are 1.4x more likely than underperformers to say traditional approaches to marketing measurement are no longer effective.

In place of web hits, views, impressions, panel data, and last click attribution, some marketers are turning to more sophisticated techniques based on data science and attribution modeling, even if their adoption rates haven't yet reached parity with older methods.

Percentage of Marketing Organizations That Measure Marketing Success/ROI with the Following

59%	55%	54%	52%	46%	42%	41%	36%	25%
Web analytics	Marketing/ad channel platform	Data management platform (DMP)	Marketing analytics/ measurement platforms	Social marketing platforms	Data science driven methods (i.e., algorithm-based models)	Marketing attribution modeling (e.g., marketing mix modeling, multi-touch attribution)	Mobile measurement platform	Homegrown solution

HIgh Performers vs. Underperformers

1.5x

more likely to measure

HIgh Performers vs. Underperformers

1.5x

more likely to measure

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Country Profiles*

Country Profile
Australia/New Zealand (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

46% of marketers who say marketing leads customer experience initiatives across their business

88% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
49%

Sales Teams
49%

Service Teams
50%

AI and Trust Underpin Customer Experiences

27% of marketers use artificial intelligence (AI)

29% of marketers use voice-activated personal assistants

32% of marketers feel challenged to balance personalization with privacy

42% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

86% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

46% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 — 10
2018 — 12
2019 — 15

Percentage of Marketing Teams Using Second-Party Data

2017 — **63**%
2018 — **65**%

Top DMP Use Cases

1. Marketing analytics and advertising performance measurement
2. Content personalization
3. Audience discovery and segmentation

Marketers Strive for Real-Time Engagement Across Channels

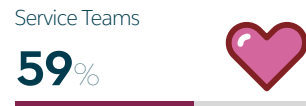**48**% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

32% Siloed
24% Dynamic
44% Duplicate

Top Metrics Tracked

1. Revenue growth
2. Web traffic and/or analytics
3. Marketing return on investment (MROI)
4. Sales effectiveness
5. Customer satisfaction metrics **AND** marketing tactic ROI*

* Tie for fifth/sixth top metrics used.
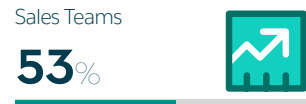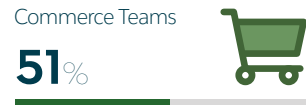
Salesforce Research

Country Profile
Belgium (150 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

47% of marketers who say marketing leads customer experience initiatives across their business

95% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
57%

Sales Teams
47%

Service Teams
49%
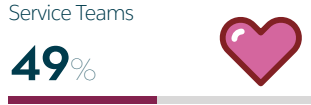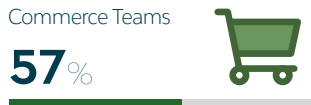
AI and Trust Underpin Customer Experiences

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93% of marketers say personalization improves their overall marketing program*

*Major or moderate improvement.

New Realities Up the Ante for Data Unification

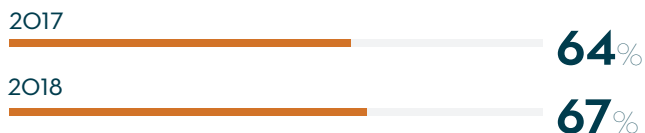**53**% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   6
2018   10
2019   12

Percentage of Marketing Teams Using Second-Party Data

2017   **68**%
2018   **79**%
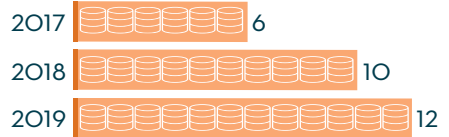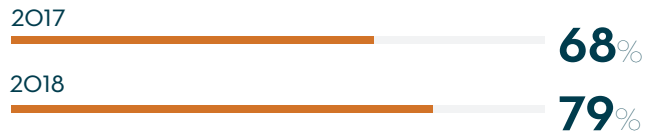
Top DMP Use Cases

1 Lookalike modeling

2 Second-party data partnerships **AND** frequency capping and media suppression*
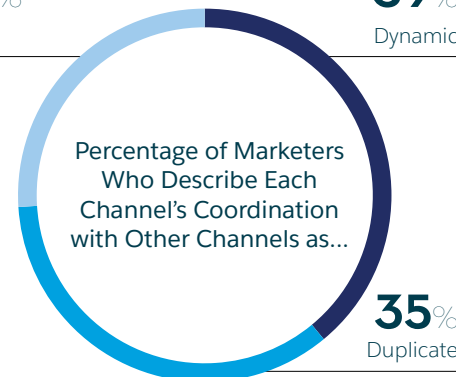
*Tie for second/third top use cases.

Marketers Strive for Real-Time Engagement Across Channels

61% of marketers say they engage customers in real time across one or more marketing channels

32% Siloed   **29**% Dynamic

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

39% Duplicate
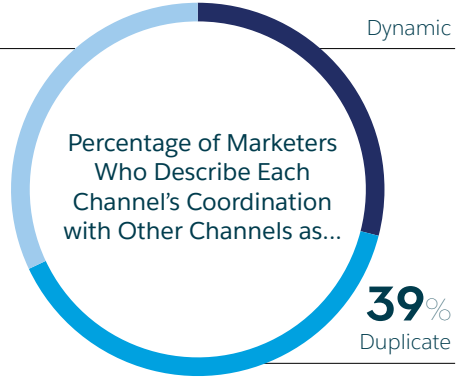
Top Metrics Tracked

1 Customer satisfaction metrics

2 Revenue growth

3 Web traffic and/or analytics

4 Sales effectiveness

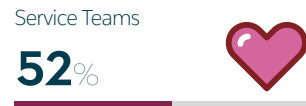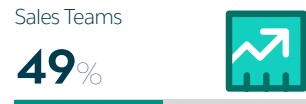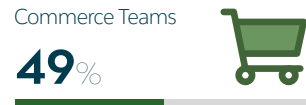**5** Customer acquisition rates

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Country Profile
Brazil (301 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

48% of marketers who say marketing leads customer experience initiatives across their business

95% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
51%

Sales Teams
53%

Service Teams
59%
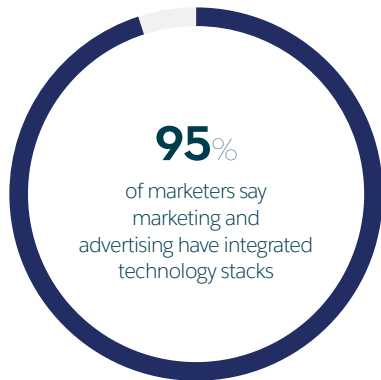
AI and Trust Underpin Customer Experiences

27% of marketers use artificial intelligence (AI)

40% of marketers use voice-activated personal assistants

35% of marketers feel challenged to balance personalization with privacy

43% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

93% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

54% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017	2018	2019
20	**25**	**38**

Percentage of Marketing Teams Using Second-Party Data

2017
64%

2018
67%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Audience discovery and segmentation

Marketers Strive for Real-Time Engagement Across Channels

55% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

26% Siloed

39% Dynamic

35% Duplicate

Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Marketing qualified leads metrics

4 Marketing return on investment (MROI) **AND** customer acquisition rates*

* Tie for fourth/fifth top metrics used.
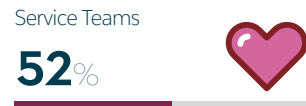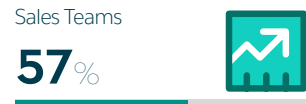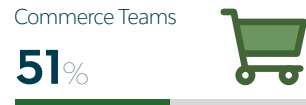
Salesforce Research

Country Profile
Canada (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

44% of marketers who say marketing leads customer experience initiatives across their business

80% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
49%

Sales Teams
49%

Service Teams
52%
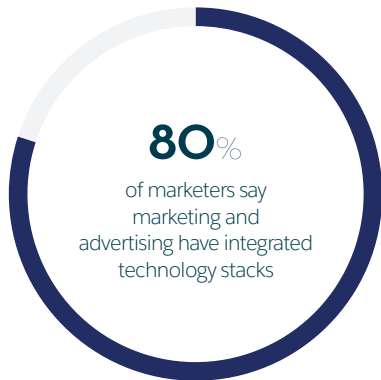
AI and Trust Underpin Customer Experiences

19% of marketers use artificial intelligence (AI)

15% of marketers use voice-activated personal assistants

25% of marketers feel challenged to balance personalization with privacy

46% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights
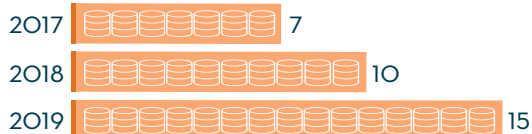
88% of marketers say personalization improves their overall marketing program*
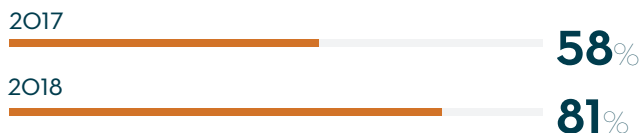
* Major or moderate improvement.

New Realities Up the Ante for Data Unification

38% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 8
2018 11
2019 14

Percentage of Marketing Teams Using Second-Party Data

2017 **46**%

2018 **55**%
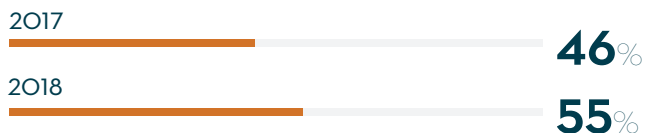
Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization **AND** identity resolution and management*

* Tie for second/third top use cases.

Marketers Strive for Real-Time Engagement Across Channels

49% of marketers say they engage customers in real time across one or more marketing channels

25% Siloed

33% Dynamic
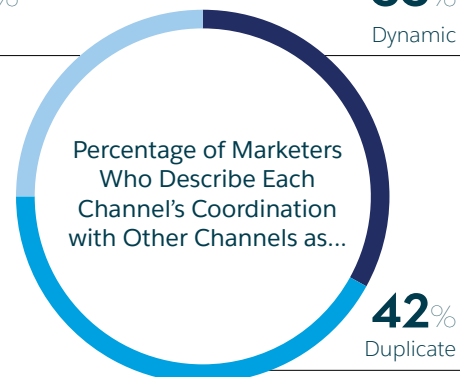
42% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Web traffic and/or analytics

4 Marketing return on investment (MROI)

5 Customer satisfaction metrics

Salesforce Research

Country Profile
France (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

48% of marketers who say marketing leads customer experience initiatives across their business

90% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
51%

Sales Teams
57%

Service Teams
52%

AI and Trust Underpin Customer Experiences

31% of marketers use artificial intelligence (AI)

33% of marketers use voice-activated personal assistants

32% of marketers feel challenged to balance personalization with privacy

46% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

95% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

48% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 7
2018 10
2019 15

Percentage of Marketing Teams Using Second-Party Data

2017 **58**%
2018 **81**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Identity resolution and management

3 Content personalization

Marketers Strive for Real-Time Engagement Across Channels

57% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

29% Siloed
33% Dynamic
37% Duplicate

Top Metrics Tracked
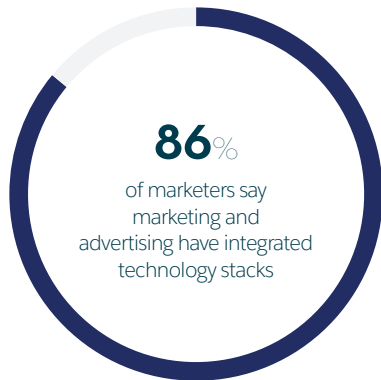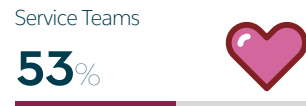
1 Revenue growth

2 Customer retention rates

3 Customer satisfaction metrics

4 Sales effectiveness

5 Web traffic and/or analytics
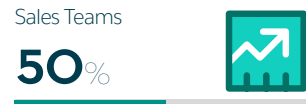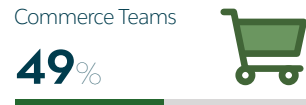
Salesforce Research

Country Profile
Germany (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

36% of marketers who say marketing leads customer experience initiatives across their business

86% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
49%

Sales Teams
50%

Service Teams
53%

AI and Trust Underpin Customer Experiences

39% of marketers use artificial intelligence (AI)

33% of marketers use voice-activated personal assistants

41% of marketers feel challenged to balance personalization with privacy

43% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

83% of marketers say personalization improves their overall marketing program*
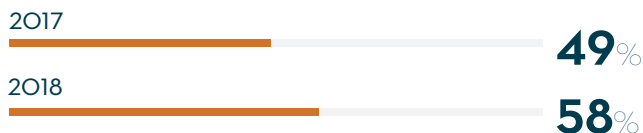
* Major or moderate improvement.

New Realities Up the Ante for Data Unification

44% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 — 10
2018 — 10
2019 — 13

Percentage of Marketing Teams Using Second-Party Data
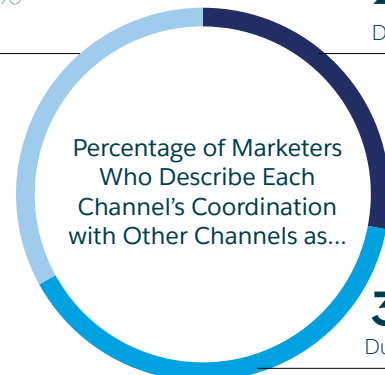
2017 **49**%

2018 **58**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Creative testing and optimization

3 Audience discovery and segmentation

Marketers Strive for Real-Time Engagement Across Channels

51% of marketers say they engage customers in real time across one or more marketing channels

33% Siloed

27% Dynamic

39% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Customer acquisition rates

3 Customer retention rates

4 Web traffic and/or analytics
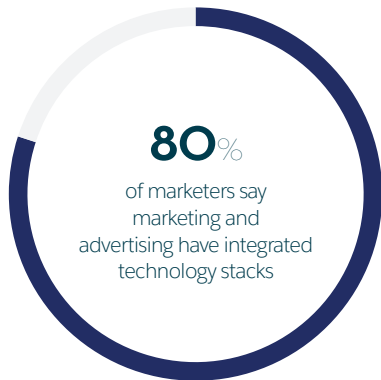
5 Customer referral rates/volume
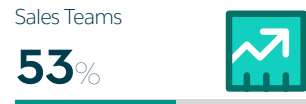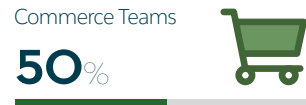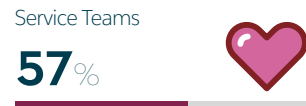
Salesforce Research

Country Profile
Hong Kong (150 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

35% of marketers who say marketing leads customer experience initiatives across their business

80% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
50%

Sales Teams
53%

Service Teams
57%

AI and Trust Underpin Customer Experiences

26% of marketers use artificial intelligence (AI)

17% of marketers use voice-activated personal assistants

32% of marketers feel challenged to balance personalization with privacy

33% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

79% of marketers say personalization improves their overall marketing program*
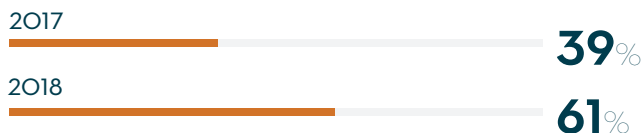
* Major or moderate improvement.

New Realities Up the Ante for Data Unification

37% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017
50

2018
60

2019
55

Percentage of Marketing Teams Using Second-Party Data
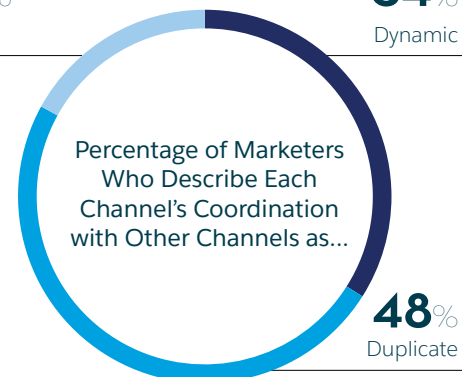
2017
39%

2018
61%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Frequency capping and media suppression

3 Content personalization

Marketers Strive for Real-Time Engagement Across Channels

44% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

17% Siloed

34% Dynamic

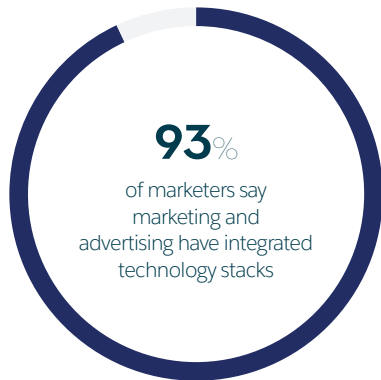**48**% Duplicate

Top Metrics Tracked

1 Revenue growth

2 Customer retention rates

3 Sales effectiveness

4 Marketing return on investment (MROI)

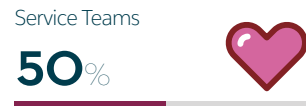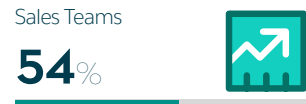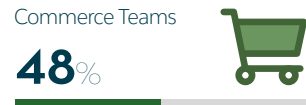**5** Customer acquisition rates

Salesforce Research

Country Profile
India (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

46% of marketers who say marketing leads customer experience initiatives across their business

93% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
48%

Sales Teams
54%

Service Teams
50%

AI and Trust Underpin Customer Experiences

44% of marketers use artificial intelligence (AI)

46% of marketers use voice-activated personal assistants

33% of marketers feel challenged to balance personalization with privacy

45% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

94% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

54% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017
10

2018
15

2019
20

Percentage of Marketing Teams Using Second-Party Data
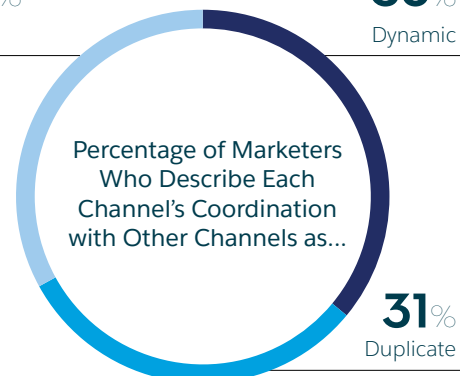
2017
62%

2018
77%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Creative testing and optimization

Marketers Strive for Real-Time Engagement Across Channels

59% of marketers say they engage customers in real time across one or more marketing channels

33% Siloed

36% Dynamic

31% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...
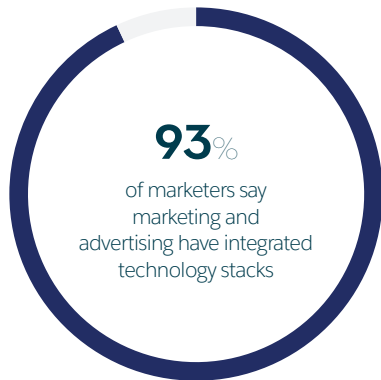
Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Marketing qualified leads metrics

4 Marketing tactic ROI

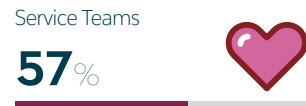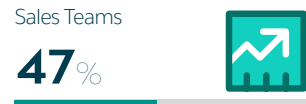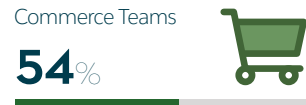**5** Customer acquisition rates

Salesforce Research

Country Profile
Japan (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

48% of marketers who say marketing leads customer experience initiatives across their business

93% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
54%

Sales Teams
47%

Service Teams
57%

AI and Trust Underpin Customer Experiences

40% of marketers use artificial intelligence (AI)

44% of marketers use voice-activated personal assistants

34% of marketers feel challenged to balance personalization with privacy

42% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights
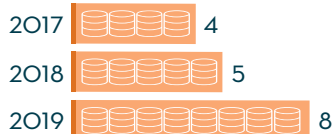
94% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

46% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   4
2018   5
2019   8

Percentage of Marketing Teams Using Second-Party Data

2017   **73**%
2018   **84**%

Top DMP Use Cases

1   Marketing analytics and advertising performance measurement

2   Content personalization

3   Frequency capping and media suppression

Marketers Strive for Real-Time Engagement Across Channels

48% of marketers say they engage customers in real time across one or more marketing channels

21% Siloed

39% Dynamic

40% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as…
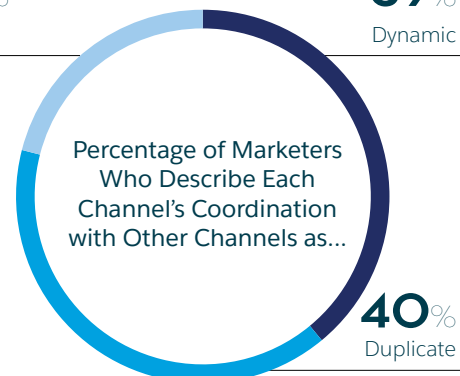
Top Metrics Tracked

1   Revenue growth

2   Customer acquisition rates

3   Digital engagement rates **AND** marketing qualified leads metrics **AND** customer retention rates*

* Tie for third/fourth/fifth top metrics used.

Salesforce Research

Country Profile
Mexico (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

46% of marketers who say marketing leads customer experience initiatives across their business

90% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
55%

Sales Teams
57%

Service Teams
59%

AI and Trust Underpin Customer Experiences

18% of marketers use artificial intelligence (AI)

31% of marketers use voice-activated personal assistants

40% of marketers feel challenged to balance personalization with privacy

51% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

92% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

55% of marketers report having a completely unified view of customer data sources

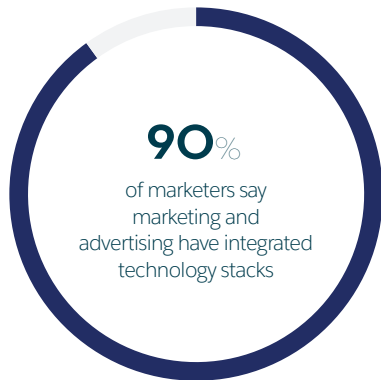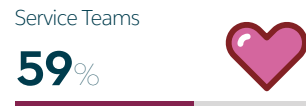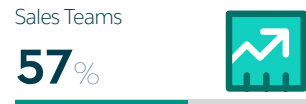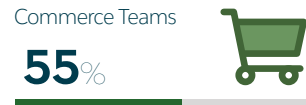**Median Number of Data Sources Used by Marketers to Target Customers/Prospects**

2017 **11**   2018 **15**   2019 **20**

Percentage of Marketing Teams Using Second-Party Data

2017 **68**%
2018 **84**%

Top DMP Use Cases

1 Media buying and optimization

2 Marketing analytics and advertising performance measurement

3 Identity resolution and management

Marketers Strive for Real-Time Engagement Across Channels

62% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

34% Siloed
30% Dynamic
36% Duplicate
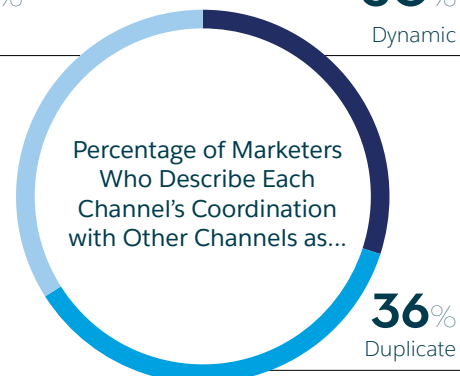
Top Metrics Tracked

1 Revenue growth
2 Sales effectiveness
3 Customer satisfaction metrics
4 Social analytics
5 Marketing tactic ROI

Salesforce Research

Country Profile
The Netherlands (200 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

35% of marketers who say marketing leads customer experience initiatives across their business

83% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
39%

Sales Teams
53%

Service Teams
48%

AI and Trust Underpin Customer Experiences

27% of marketers use artificial intelligence (AI)

32% of marketers use voice-activated personal assistants

33% of marketers feel challenged to balance personalization with privacy

38% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

78% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

43% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   10
2018   12
2019   14

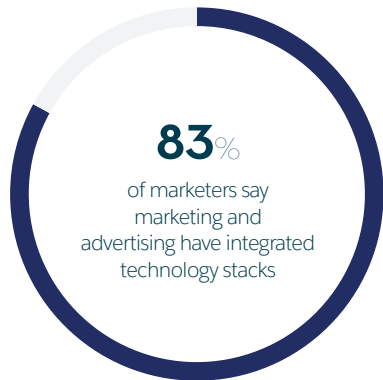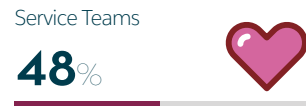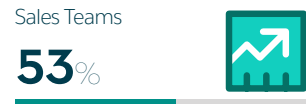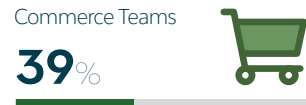**Percentage of Marketing Teams Using Second-Party Data**

2017   **53**%

2018   **61**%
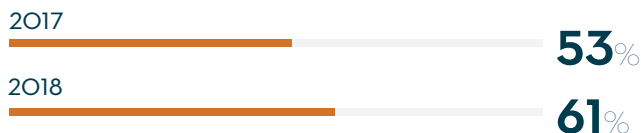
Top DMP Use Cases

1 Content personalization

2 Media buying and optimization **AND** identity resolution and management*

* Tie for second/third top use cases.

Marketers Strive for Real-Time Engagement Across Channels

48% of marketers say they engage customers in real time across one or more marketing channels

42% Siloed

18% Dynamic
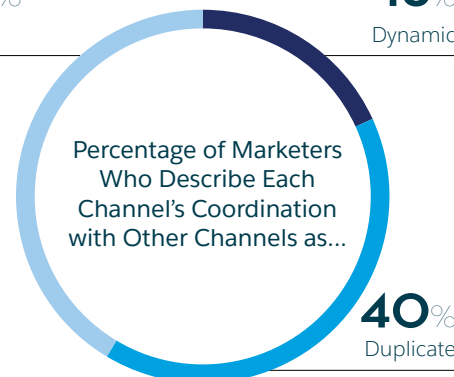
40% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Customer satisfaction metrics

4 Web traffic and/or analytics

5 Customer retention rates

Salesforce Research

Country Profile
The Nordics (150 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

45% of marketers who say marketing leads customer experience initiatives across their business

91% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
41%

Sales Teams
38%

Service Teams
42%

AI and Trust Underpin Customer Experiences

38% of marketers use artificial intelligence (AI)

38% of marketers use voice-activated personal assistants

39% of marketers feel challenged to balance personalization with privacy

43% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

80% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

51% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017	2018	2019
35	**53**	**80**

Percentage of Marketing Teams Using Second-Party Data

2017 **65**%

2018 **80**%

Top DMP Use Cases

1 Media buying and optimization **AND** creative testing and optimization*

3 Marketing analytics and advertising performance measurement

* Tie for first/second top use cases.
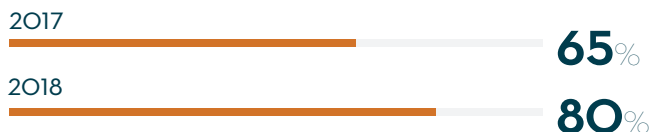
Marketers Strive for Real-Time Engagement Across Channels

58% of marketers say they engage customers in real time across one or more marketing channels
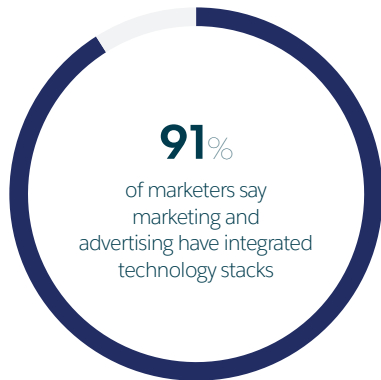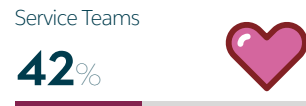
35% Siloed

26% Dynamic

39% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...
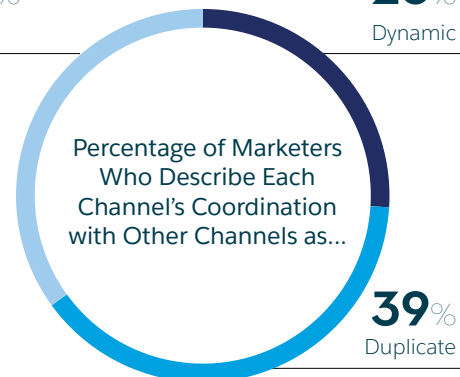
Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Marketing tactic ROI

4 Digital engagement rates **AND** customer satisfaction metrics*

* Tie for fourth/fifth top metrics used.
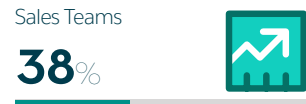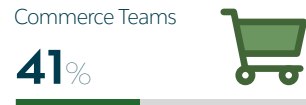
Salesforce Research

Country Profile
Singapore (150 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

42% of marketers who say marketing leads customer experience initiatives across their business

84% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
41%

Sales Teams
54%

Service Teams
37%
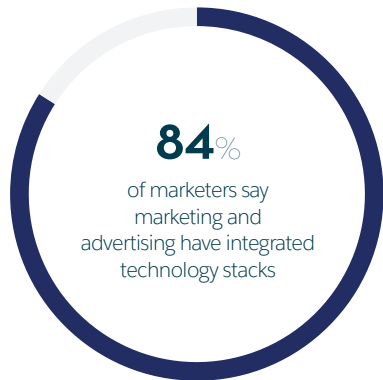
AI and Trust Underpin Customer Experiences

31% of marketers use artificial intelligence (AI)

26% of marketers use voice-activated personal assistants

32% of marketers feel challenged to balance personalization with privacy

37% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

84% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

48% of marketers report having a completely unified view of customer data sources

**Median Number of Data Sources Used by Marketers to Target Customers/Prospects**

2017   8
2018   10
2019   15

Percentage of Marketing Teams Using Second-Party Data

2017   **52**%
2018   **75**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Identity resolution and management

3 Content personalization

Marketers Strive for Real-Time Engagement Across Channels

57% of marketers say they engage customers in real time across one or more marketing channels

31% Siloed

31% Dynamic
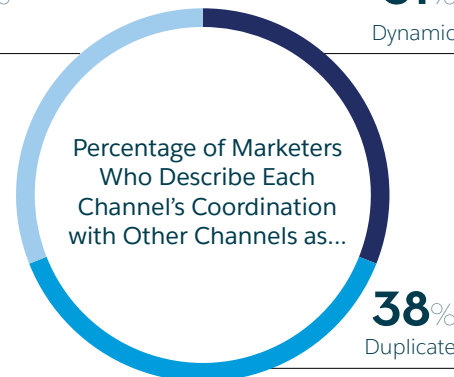
38% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Customer satisfaction metrics

3 Sales effectiveness

4 Customer acquisition rates

5 Web traffic and/or analytics

Salesforce Research

Country Profile
The United Kingdom/Ireland (300 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

44% of marketers who say marketing leads customer experience initiatives across their business
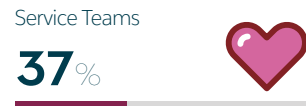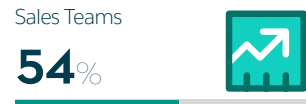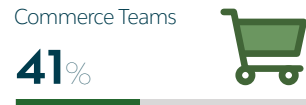
85% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
49%

Sales Teams
51%

Service Teams
50%

AI and Trust Underpin Customer Experiences

31% of marketers use artificial intelligence (AI)

27% of marketers use voice-activated personal assistants

36% of marketers feel challenged to balance personalization with privacy

41% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

88% of marketers say personalization improves their overall marketing program*
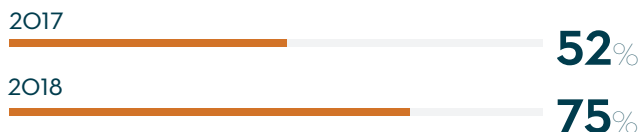
* Major or moderate improvement.

New Realities Up the Ante for Data Unification

42% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 10
2018 12
2019 15

Percentage of Marketing Teams Using Second-Party Data

2017 **57**%

2018 **63**%
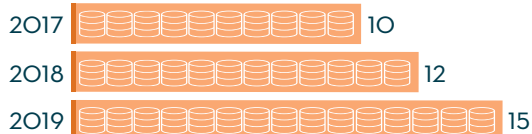
Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Identity resolution and management

3 Media buying and optimization **AND** content personalization*

* Tie for third/fourth top use cases.
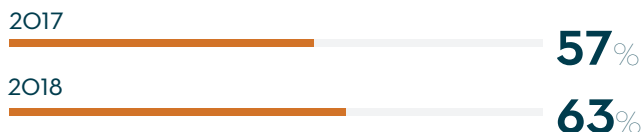
Marketers Strive for Real-Time Engagement Across Channels

44% of marketers say they engage customers in real time across one or more marketing channels

27% Siloed

31% Dynamic
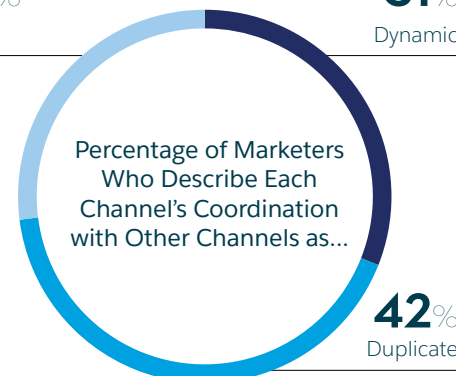
42% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Web traffic and/or analytics

3 Sales effectiveness

4 Customer satisfaction metrics

5 Customer acquisition rates

Salesforce Research

Country Profile
United States (600 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

47% of marketers say marketing leads customer experience initiatives across their business
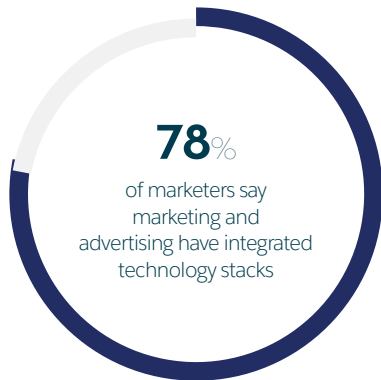
78% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
54%

Sales Teams
58%

Service Teams
57%

AI and Trust Underpin Customer Experiences

21% of marketers use artificial intelligence (AI)

28% of marketers use voice-activated personal assistants

35% of marketers feel challenged to balance personalization with privacy

45% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

88% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

44% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 8
2018 11
2019 15

Percentage of Marketing Teams Using Second-Party Data

2017 **53**%

2018 **62**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Creative testing and optimization

Marketers Strive for Real-Time Engagement Across Channels

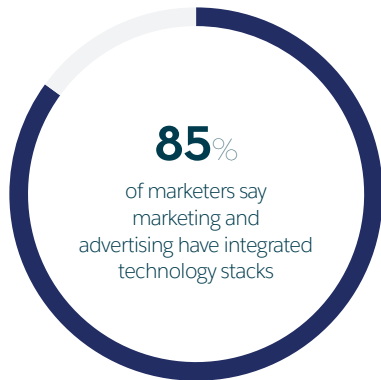**47**% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

26% Siloed
32% Dynamic
41% Duplicate

Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Web traffic and/or analytics

4 Marketing return on investment (MROI)

5 Customer retention rates
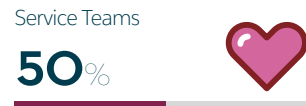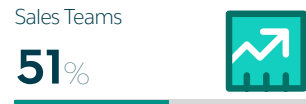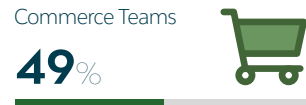
Salesforce Research
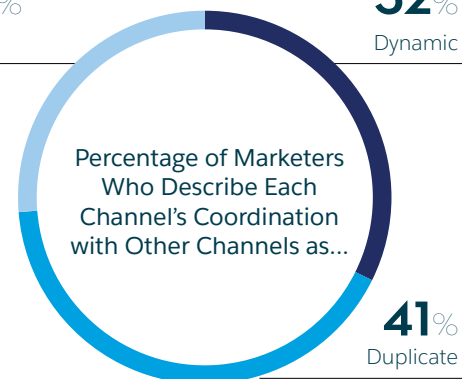
Industry Profiles

Industry Profile
Retail and Consumer Goods (890 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

44% of marketers who say marketing leads customer experience initiatives across their business

88% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
51%

Sales Teams
53%

Service Teams
53%
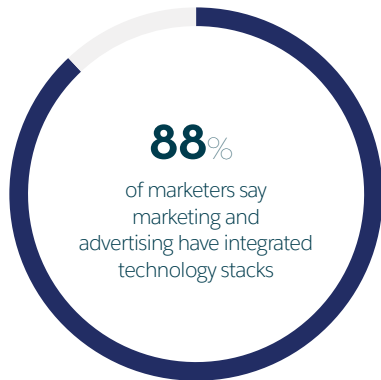
AI and Trust Underpin Customer Experiences

25% of marketers use artificial intelligence (AI)

29% of marketers use voice-activated personal assistants

33% of marketers feel challenged to balance personalization with privacy

44% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

88% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

49% of marketers report having a completely unified view of customer data sources

### Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   10
2018   12
2019   16

Percentage of Marketing Teams Using Second-Party Data

2017   **55**%

2018   **68**%
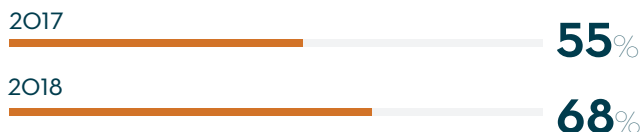
Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

**2** Content personalization

3 Media buying and optimization

Marketers Strive for Real-Time Engagement Across Channels

50% of marketers say they engage customers in real time across one or more marketing channels

27% Siloed

34% Dynamic
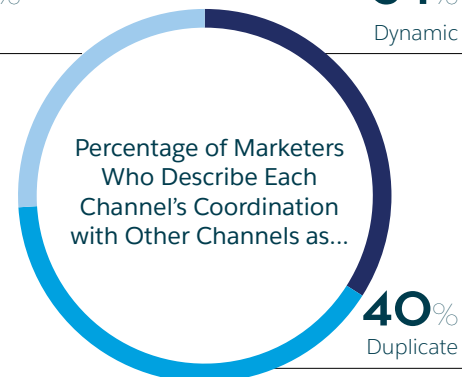
40% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Web traffic and/or analytics

4 Marketing return on investment (MROI)

5 Customer retention rates
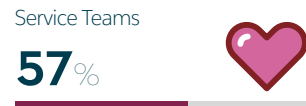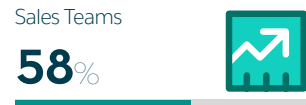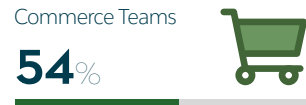
Salesforce Research

Industry Profile
Financial Services (518 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

44% of marketers who say marketing leads customer experience initiatives across their business

91% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
49%

Sales Teams
48%

Service Teams
47%

AI and Trust Underpin Customer Experiences

35% of marketers use artificial intelligence (AI)

38% of marketers use voice-activated personal assistants

36% of marketers feel challenged to balance personalization with privacy

45% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

90% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.
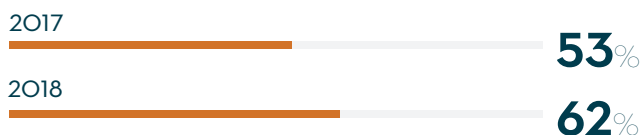
New Realities Up the Ante for Data Unification

47% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 10
2018 12
2019 18

Percentage of Marketing Teams Using Second-Party Data

2017 **66**%

2018 **77**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Creative testing and optimization

3 Content personalization

Marketers Strive for Real-Time Engagement Across Channels

56% of marketers say they engage customers in real time across one or more marketing channels

32% Siloed

29% Dynamic

39% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as…
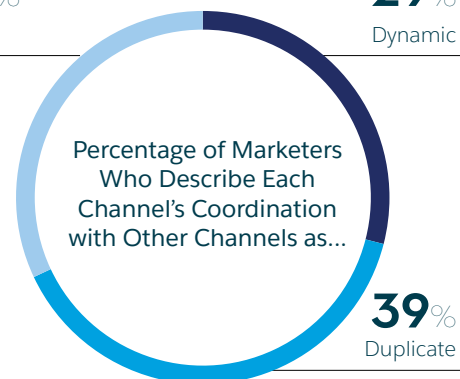
Top Metrics Tracked

1 Revenue growth

2 Sales effectiveness

3 Customer satisfaction metrics

4 Customer retention rates

5 Customer acquisition rates

Salesforce Research

Industry Profile
Manufacturing (386 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

46% of marketers who say marketing leads customer experience initiatives across their business

84% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
50%

Sales Teams
55%

Service Teams
55%
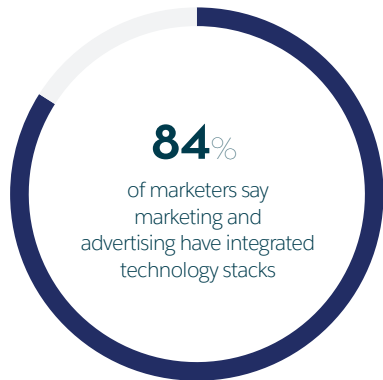
AI and Trust Underpin Customer Experiences

31% of marketers use artificial intelligence (AI)

30% of marketers use voice-activated personal assistants

33% of marketers feel challenged to balance personalization with privacy

45% of marketers go beyond regulations/industry standards to protect and respect customer privacy/rights

91% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

46% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017 — 8
2018 — 10
2019 — 14

Percentage of Marketing Teams Using Second-Party Data

2017 — **54**%
2018 — **68**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Identity resolution and management

Marketers Strive for Real-Time Engagement Across Channels

51% of marketers say they engage customers in real time across one or more marketing channels

32% Siloed
32% Dynamic
36% Duplicate

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...
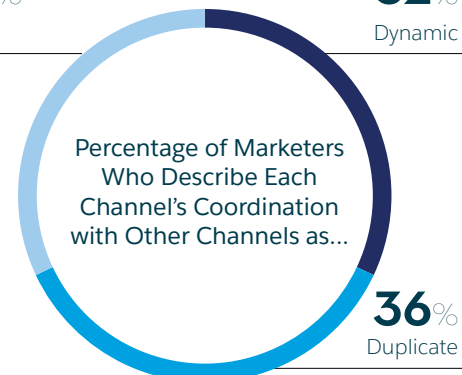
Top Metrics Tracked

1 Revenue growth
2 Sales effectiveness
3 Customer acquisition rates AND marketing return on investment (MROI)*
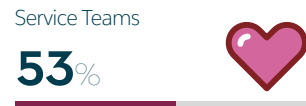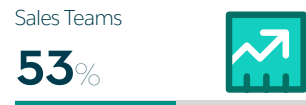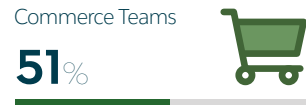5 Customer satisfaction metrics

* Tie for third/fourth top metrics used.

Salesforce Research

Industry Profile
Healthcare and Life Sciences (320 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

40% of marketers who say marketing leads customer experience initiatives across their business

85% of marketers say marketing and advertising have integrated technology stacks

Percentage of Marketers Who Share Common Goals and Metrics with the Following

Commerce Teams
50%

Sales Teams
49%

Service Teams
48%
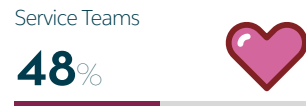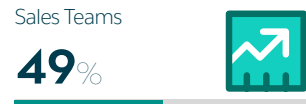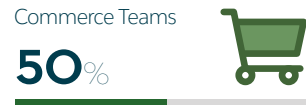
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89% of marketers say personalization improves their overall marketing program*

* Major or moderate improvement.

New Realities Up the Ante for Data Unification

45% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   7
2018   10
2019   12

Percentage of Marketing Teams Using Second-Party Data

2017   **65**%
2018   **73**%
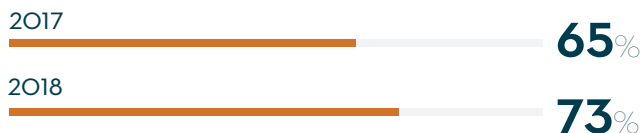
Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Media buying and optimization

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53% of marketers say they engage customers in real time across one or more marketing channels

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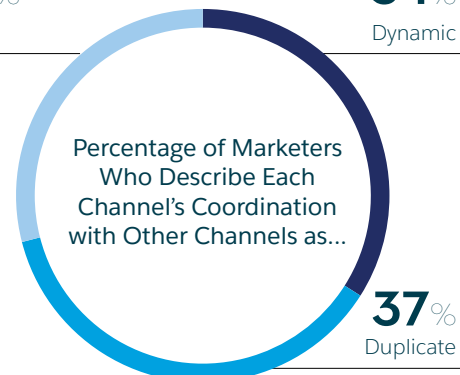
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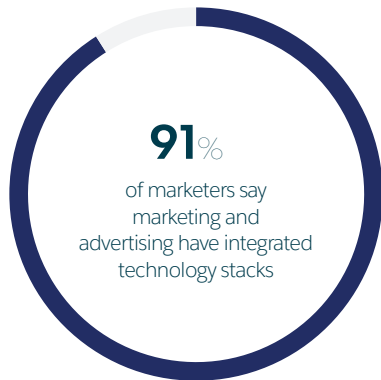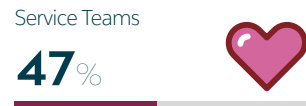
Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as…

Top Metrics Tracked

1 Revenue growth

2 Customer satisfaction metrics

3 Sales effectiveness

4 Customer retention rates

5 Web traffic and/or analytics
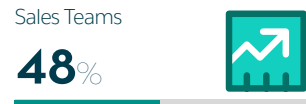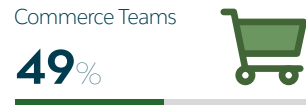
Salesforce Research

Industry Profile
Communications and Media (288 marketing professionals)

Marketing Becomes the Cross-Functional Glue of Customer Experiences

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Sales Teams
47%

Service Teams
56%
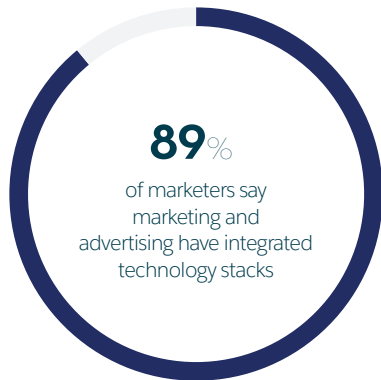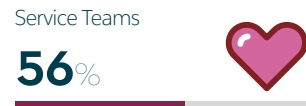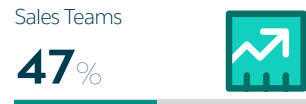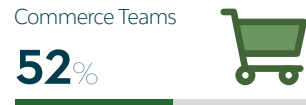
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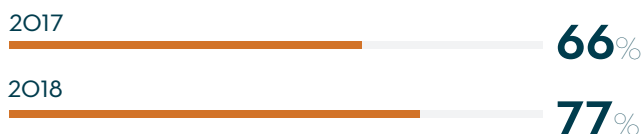
* Major or moderate improvement.

New Realities Up the Ante for Data Unification

47% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   10
2018   10
2019   15

Percentage of Marketing Teams Using Second-Party Data

2017   **61**%
2018   **67**%

Top DMP Use Cases

1 Marketing analytics and advertising performance measurement

2 Content personalization

3 Creative testing and optimization

Marketers Strive for Real-Time Engagement Across Channels

55% of marketers say they engage customers in real time across one or more marketing channels

Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as...

28% Siloed
35% Dynamic
37% Duplicate

Top Metrics Tracked

1 Revenue growth

2 Web traffic and/or analytics

3 Sales effectiveness

4 Digital engagement rates

5 Customer satisfaction metrics

Salesforce Research

Industry Profile
Travel, Transportation, and Hospitality (157 marketing professionals)
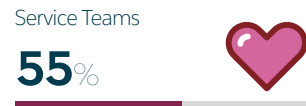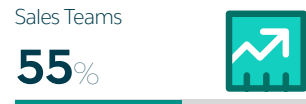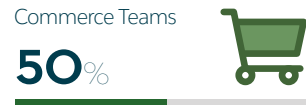
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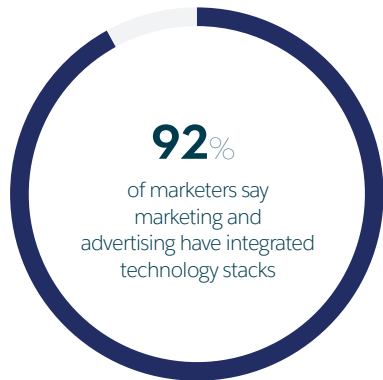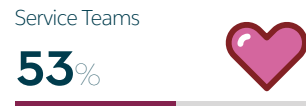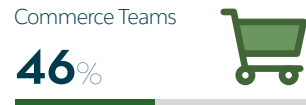
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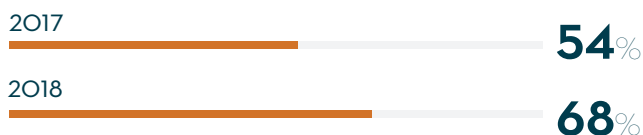
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New Realities Up the Ante for Data Unification

44% of marketers report having a completely unified view of customer data sources

Median Number of Data Sources Used by Marketers to Target Customers/Prospects

2017   8
2018   12
2019   15

Percentage of Marketing Teams Using Second-Party Data

2017   **54**%
2018   **66**%
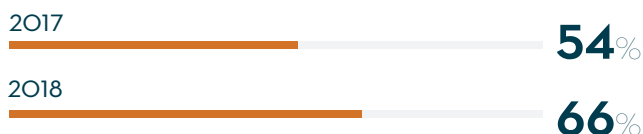
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Marketers Strive for Real-Time Engagement Across Channels

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27% Siloed

30% Dynamic

43% Duplicate

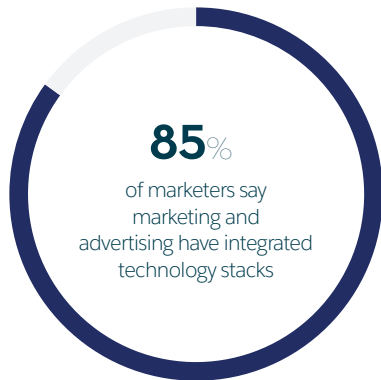Percentage of Marketers Who Describe Each Channel's Coordination with Other Channels as…
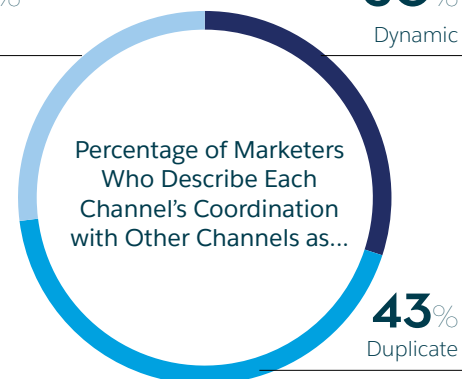
Top Metrics Tracked

1 Revenue growth

2 Marketing qualified leads metrics

3 Customer satisfaction metrics

4 Sales effectiveness

5 Web traffic and/or analytics **AND** customer acquisition rates*

* Tie for fifth/sixth top metrics used.

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Appendix

Percentage of Marketers Using the Following Technologies

	Currently use / Plan to use within two years	Projected Two-Year Growth	2017*	Current Use by Performance (Underperformers / Moderate performers / High performers)
Marketing analytics/measurement tools	81% / 16%	+20%	35%	74% / 82% / 85%
Email campaign management	66% / 28%	+42%	33%	65% / 65% / 68%
Marketing database	65% / 30%	+46%	NA	61% / 64% / 72%
Email service provider (ESP)	64% / 28%	+44%	NA	63% / 63% / 67%
Social publishing tools	63% / 30%	+48%	32%	54% / 63% / 72%
Customer relationship management (CRM) system	62% / 32%	+52%	35%	59% / 61% / 71%
Advertising platforms	61% / 32%	+52%	NA	52% / 61% / 66%
Internal collaboration tools	60% / 33%	+55%	31%	56% / 59% / 68%
Content management platform	55% / 37%	+68%	31%	46% / 54% / 65%
Data management platform (DMP)	55% / 35%	+64%	31%	46% / 54% / 66%
Mobile campaign management	50% / 39%	+77%	28%	35% / 51% / 62%
Guided selling	49% / 39%	+79%	27%	38% / 49% / 61%
Customer data platform (CDP)	49% / 39%	+79%	NA	34% / 49% / 62%
Loyalty program platform	48% / 38%	+80%	31%	32% / 48% / 63%
Lead nurturing and scoring tools	47% / 41%	+86%	27%	33% / 47% / 62%
Social listening tools	47% / 39%	+82%	28%	32% / 48% / 60%
Marketing automation platform	44% / 42%	+95%	29%	29% / 44% / 57%
Artificial intelligence (AI)	29% / 46%	+157%	20%	15% / 30% / 40%

* 2017 data is based on responses of "currently use extensively" on a four-point scale, whereas 2018 data is based on responses of "currently use" on a three-point scale.

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Appendix

Extent to Which Marketing Technology Is Integrated with the Following Business Systems

■ Completely integrated   ■ Partially integrated   ■ Not integrated

	Completely integrated	Partially integrated	Not integrated
Data management platform (DMP)*	64%	33%	3%
Customer service systems	60%	34%	6%
Loyalty/offer/booking management systems*	58%	37%	5%
Analytics systems	53%	41%	6%
Commerce platform*	52%	40%	8%
CRM, ERP, or other sales systems	52%	39%	9%
In-store point of sale	51%	35%	13%
Advertising technology	41%	45%	13%
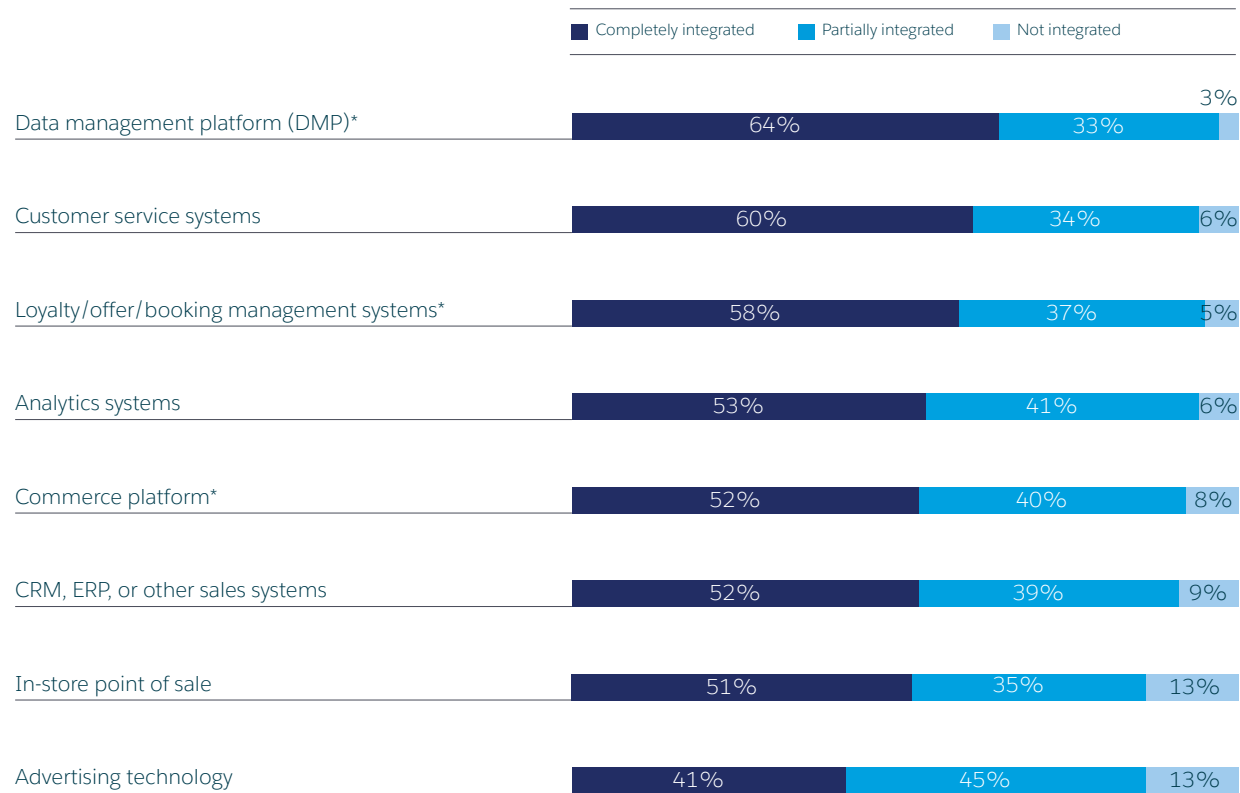
* Base: Respondents whose marketing organizations use the technology.

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Percentage of Marketers Using or Planning to Use the Following Channels to Market to Prospects/Customers

	Currently use	Plan to use within 12 months	Projected One-Year Growth	2017*	Current Use by Performance
					Underperformers — Moderate performers — High performers
Website	82%	17%	+20%	55%	81% 83% 86%
Email marketing	74%	21%	+28%	39%	73% 74% 78%
Display/banner ads	67%	24%	+36%	33%	62% 68% 71%
Social advertising	65%	29%	+45%	39%	57% 65% 71%
Social publishing	62%	29%	+47%	43%	59% 61% 68%
Video advertising	54%	35%	+64%	31%	44% 54% 64%
Mobile app	54%	35%	+66%	32%	44% 54% 63%
Customer communities	53%	34%	+64%	29%	41% 53% 65%
Mobile messaging	53%	31%	+59%	25%	41% 53% 65%
Native advertising/sponsored content	52%	37%	+71%	30%	43% 52% 59%
Affiliate marketing	51%	35%	+70%	NA	39% 51% 62%
Paid search/SEM	48%	37%	+77%	27%	41% 48% 55%
Internet of Things (IoT)/connected devices	44%	37%	+85%	29%	29% 44% 59%
Voice-activated personal assistants	32%	40%	+126%	NA	16% 31% 49%
Virtual reality (VR) or augmented reality (AR)	24%	42%	+171%	NA	12% 25% 33%

* 2017 data is based on responses of "currently use extensively" on a four-point scale, whereas 2018 data is based on responses of "currently use" on a three-point scale.

Percentage of Marketers Who Describe Their Cross-Channel Coordination as Follows

	Dynamic	Duplicate	Siloed

Website
2017: 31% | 50% | 19%
2018: 35% | 36% | 28%

Mobile app
2017: NA
2018: 34% | 37% | 29%

Social advertising
2017: 30% | 51% | 18%
2018: 34% | 40% | 26%

Video advertising
2017: 28% | 53% | 20%
2018: 32% | 40% | 28%

Social publishing
2017: 33% | 48% | 18%
2018: 31% | 42% | 27%

Email
2017: 29% | 51% | 20%
2018: 31% | 39% | 31%

Mobile messaging
2017: 27% | 51% | 22%
2018: 30% | 39% | 31%

Display/banner ads
2017: 25% | 54% | 21%
2018: 30% | 42% | 28%

Paid search/SEM
2017: 27% | 51% | 22%
2018: 30% | 39% | 31%

Voice-activated personal assistants
2017: NA
2018: 27% | 37% | 35%

Base: Marketers currently using indicated channel.

Percentage of Marketers Using or Planning to Use Artificial Intelligence (AI) in the Following Ways

	Currently use	Plan to use within two years	Projected Two-Year Growth
Personalize the overall customer journey	24%	59%	+244%
Drive next best offers in real time	24%	56%	+234%
Automate customer interactions over social channels or messaging apps	23%	57%	+252%
Personalize channel experiences	22%	60%	+266%
Leverage online data to facilitate offline experiences	22%	57%	+257%
Generate dynamic landing pages and websites	22%	57%	+257%
Programmatic advertising and media buying	22%	58%	+269%
Deliver predictive journeys	21%	53%	+248%
Improve customer segmentation/ lookalike audience modeling	21%	59%	+277%
Leverage offline data to facilitate online experiences	21%	55%	+265%

Current Use by Performance

● Underperformers ● Moderate performers ● High performers

	Underperformers	Moderate performers	High performers
Personalize the overall customer journey	17%	23%	34%
Drive next best offers in real time	13%	24%	31%
Automate customer interactions	13%	22%	32%
Personalize channel experiences	14%	21%	32%
Leverage online data	13%	21%	32%
Generate dynamic landing pages	12%	22%	30%
Programmatic advertising	13%	21%	30%
Deliver predictive journeys	14%	21%	30%
Improve customer segmentation	13%	20%	31%
Leverage offline data	13%	20%	30%

Base: Marketers currently using AI or planning to use AI.

Appendix

Percentage of Marketers Using or Planning to Use a Data Management Platform (DMP) in the Following Ways

	Currently use	Plan to use within two years	Projected Two-Year Growth
Marketing analytics and advertising performance measurement	43%	46%	+106%
Content personalization	38%	47%	+125%
Media buying and optimization	36%	47%	+131%
Identity resolution and management	36%	48%	+133%
Creative testing and optimization	36%	48%	+134%
Audience discovery and segmentation	34%	49%	+146%
Audience insights	30%	50%	+168%
Frequency capping and media suppression	29%	43%	+148%
Second-party data partnerships	29%	47%	+163%
Lookalike modeling	25%	44%	+175%

Current Use by Performance

Underperformers / Moderate performers / High performers

	Underperformers	Moderate performers	High performers
Marketing analytics	40%	41%	55%
Content personalization	30%	37%	48%
Media buying	29%	34%	48%
Identity resolution	28%	34%	48%
Creative testing	26%	34%	49%
Audience discovery	25%	33%	44%
Audience insights	20%	29%	43%
Frequency capping	20%	28%	41%
Second-party data	18%	28%	40%
Lookalike modeling	16%	25%	34%

Base: Marketers currently using a DMP or planning to use a DMP.

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Survey Demographics

Survey Demographics

INDUSTRY

Retail and consumer goods 22%
Financial services..13%
Technology 11%
Manufacturing 9%
Healthcare and life sciences 8%
Communications and media 7%
Engineering, architecture, construction,
real estate.. 6%
Professional services... 5%
Automotive... 5%
Travel, transportation, and hospitality............... 4%
Other...11%

COMPANY SIZE

Small (21–100 employees)..21%
Medium (101–3,500 employees) 63%
Enterprise (3,501+ employees) 17%

COMPANY TYPE

Business-to-business (B2B) 24%
Business-to-consumer (B2C) 37%
Business-to-business-to-consumer (B2B2C)........39%

COUNTRY

United States...15%
Brazil 7%
Australia / New Zealand 7%
Canada 7%
France 7%
Germany 7%
India 7%
Japan 7%
Mexico 7%
United Kingdom / Ireland..................................... 7%
Netherlands.. 5%
Singapore 4%
Belgium 4%
Hong Kong... 4%
Nordics 4%

REGION

Europe 34%
Asia-Pacific..29%
North America 22%
Latin America 15%

DEPARTMENT

Executive management.....................................44%
Marketing..56%

ROLE WITHIN MARKETING

CEO, owner, or equivalent................................26%
CMO...15%
VP of marketing 12%
Director, manager, or equivalent......................47%

GENERATION

Baby boomers/Traditionalists (born before 1965) 6%
Gen Xers (born 1965–1980) 48%
Millennials / Gen Zers (born 1981–1999)....................46%

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