



2015 STATE OF MARKETING

Insights from over 5,000 global marketers

2015 STATE OF MARKETING

In the fall of 2014, we surveyed thousands of marketers for our second annual *State of Marketing* report. We wanted to learn marketers' top priorities for 2015 across all digital channels — and how their budgets, metrics, and strategies supported their goals.

With more than 5,000 responses, this report offers a data-centric look at the digital marketing landscape of 2015, as well as the increasing significance of the customer journey.

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Executive Summary: Global

The *2015 State of Marketing* survey asked marketers about their budgets, priorities, channels, strategies, and metrics for 2015. Here's a snapshot of key findings based on cumulative responses from marketers around the world. See executive summaries by country, region, and business type (B2B and B2C) beginning on p. 37 for more detailed data.

Most Pressing Business Challenges

- #1

New business development
- #2

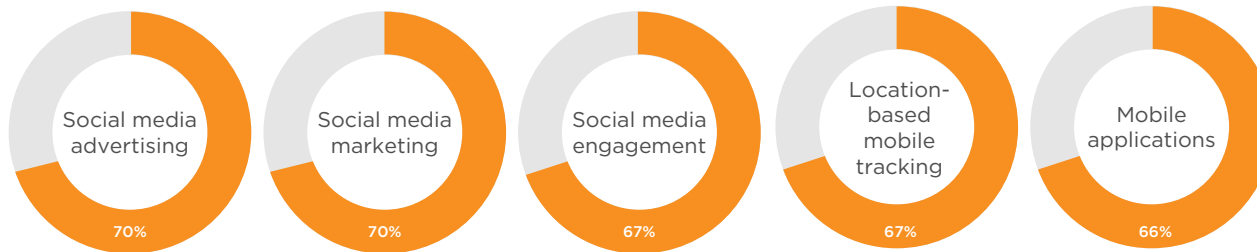
Quality of leads
- #3

Remaining up to date with current marketing technology and trends

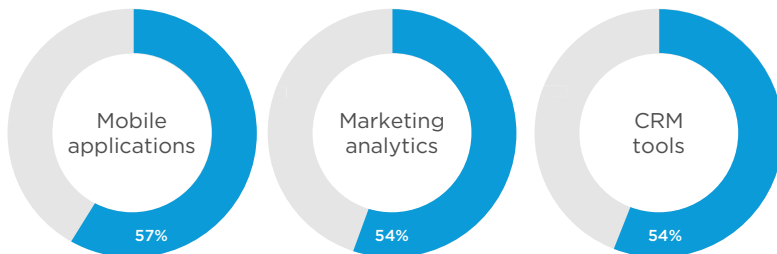
84% of marketers plan to increase or maintain their spend in 2015.

38% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=2397*
73% of marketers believe email marketing is core to their business	
49% always/often use responsive design in emails	
47% report click-through rate as the most important email marketing metric	
23% don't know what device emails are read on	

MOBILE	N=2306*
71% of marketers believe mobile marketing is core to their business	
68% have integrated mobile marketing into their overall marketing strategy	
58% have a dedicated mobile marketing team	
43% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=2986*
66% of marketers believe social media marketing is core to their business	
66% have a dedicated social media team	
64% believe social is a critical enabler of their products and services	
42% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Finding a Focus for 2015

Marketers in 2015 will have a record-high number of technologies, channels, and tactics to choose from. The first step toward a solid strategy is finding focus amid the noise, whether that noise is coming from a social network claiming to own the most valuable audience or a pundit declaring that the CMO is now the chief officer of something new.

With an ever-greater number of responsibilities and tactics to test, marketers must keep a tight focus on the metrics that not only matter to their business, but also can truly be influenced. We asked survey respondents to identify their top metrics for success in the new year, as shown in the following chart.

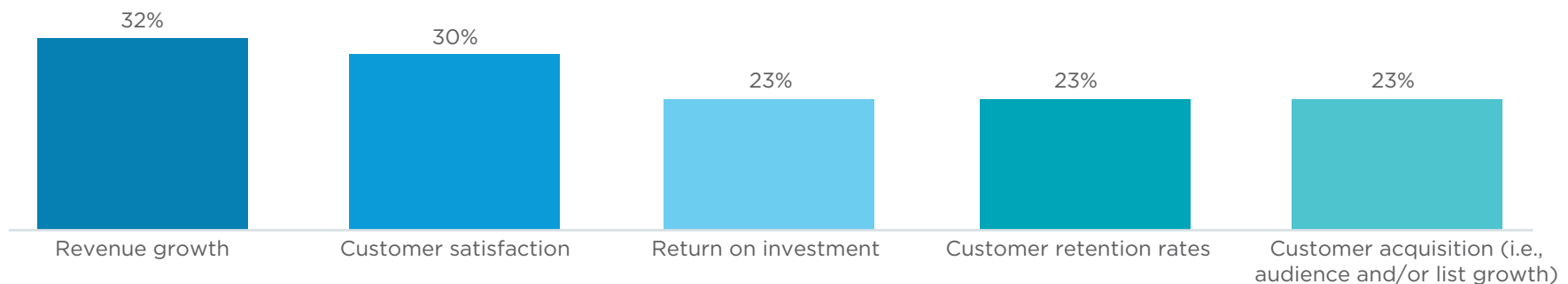
Revenue growth was the number-one metric for surveyed marketers. In *The State of Marketing Leadership*,¹ a report on senior-level marketers published by LinkedIn and Salesforce Marketing Cloud, revenue growth was also named the top metric to gauge marketing success. Revenue growth will continue be the primary success metric that marketers use

in 2015, while customer satisfaction is a close second: 30% of marketers say that customer satisfaction is one of their top metrics.

The third most important metric was a tie between ROI, customer retention rates, and customer acquisition, demonstrating that 2015 focus will largely center on attracting customers and engaging them long-term.

With so many technologies demanding substantial time and effort, marketers must evaluate which tools will be most effective for their unique business goals. The chart on p. 5 shows a long list of potential channels and strategies to invest in and the percentage of marketers who currently use them. It also shows average ratings of that channel or strategy's effectiveness and whether marketers who aren't using it plan to do so in the next 12 months.

Top 5 Digital Marketing Metrics for Success

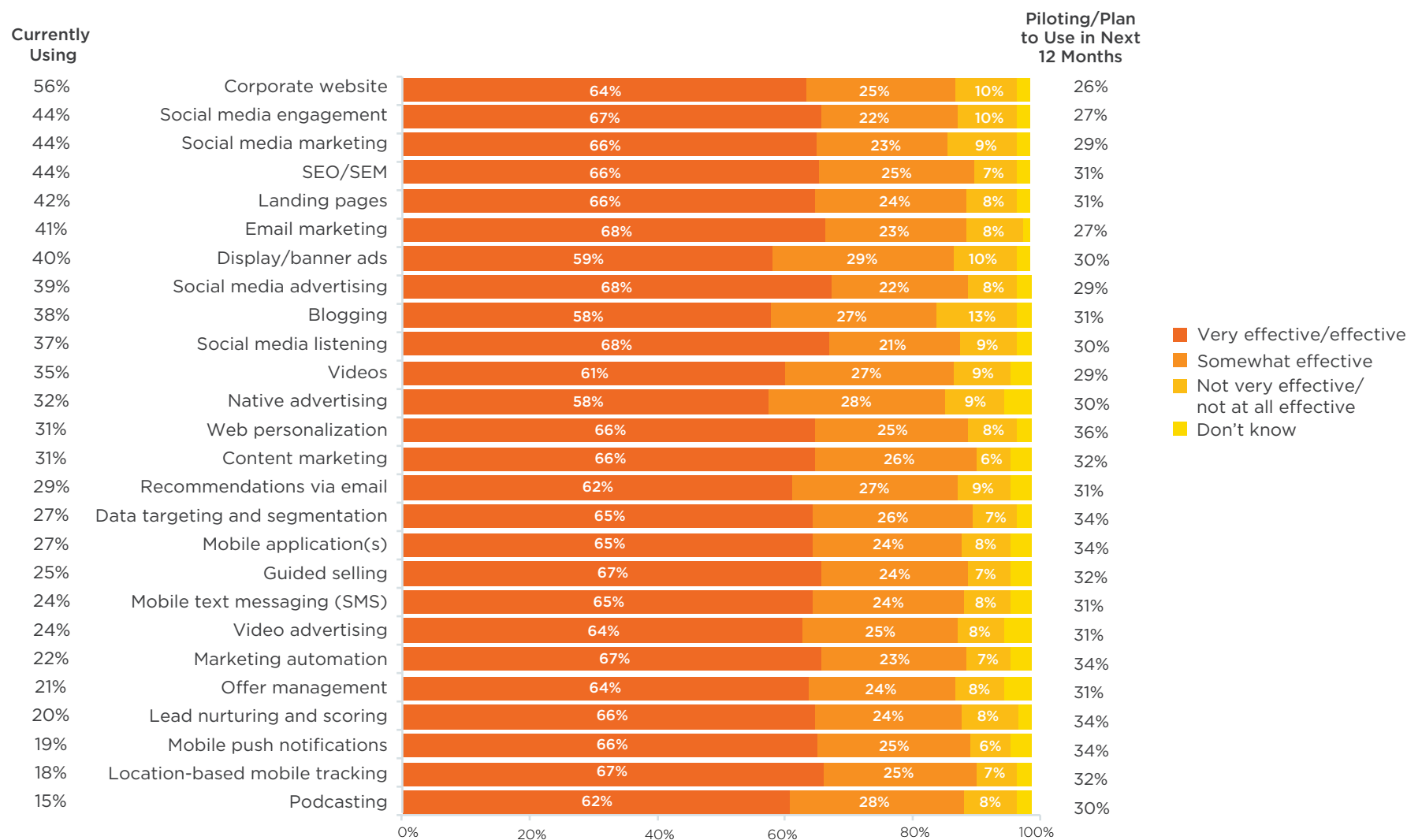


Increasingly, marketers are shifting attention from traditional metrics like conversion rates and return on investment to metrics that better reflect customer satisfaction.

¹ *The State of Marketing Leadership*, Salesforce Marketing Cloud and LinkedIn, November 2014

Finding a Focus for 2015

Popularity and Effectiveness of Digital Marketing Channels and Strategies



Email marketing, social media advertising, and social media listening had the highest very effective/effective ratings. Meanwhile, blogging, display/banner ads, corporate website, and native advertising had the highest number of marketers saying they didn't know whether they'd use them, showing a need for greater training and education around

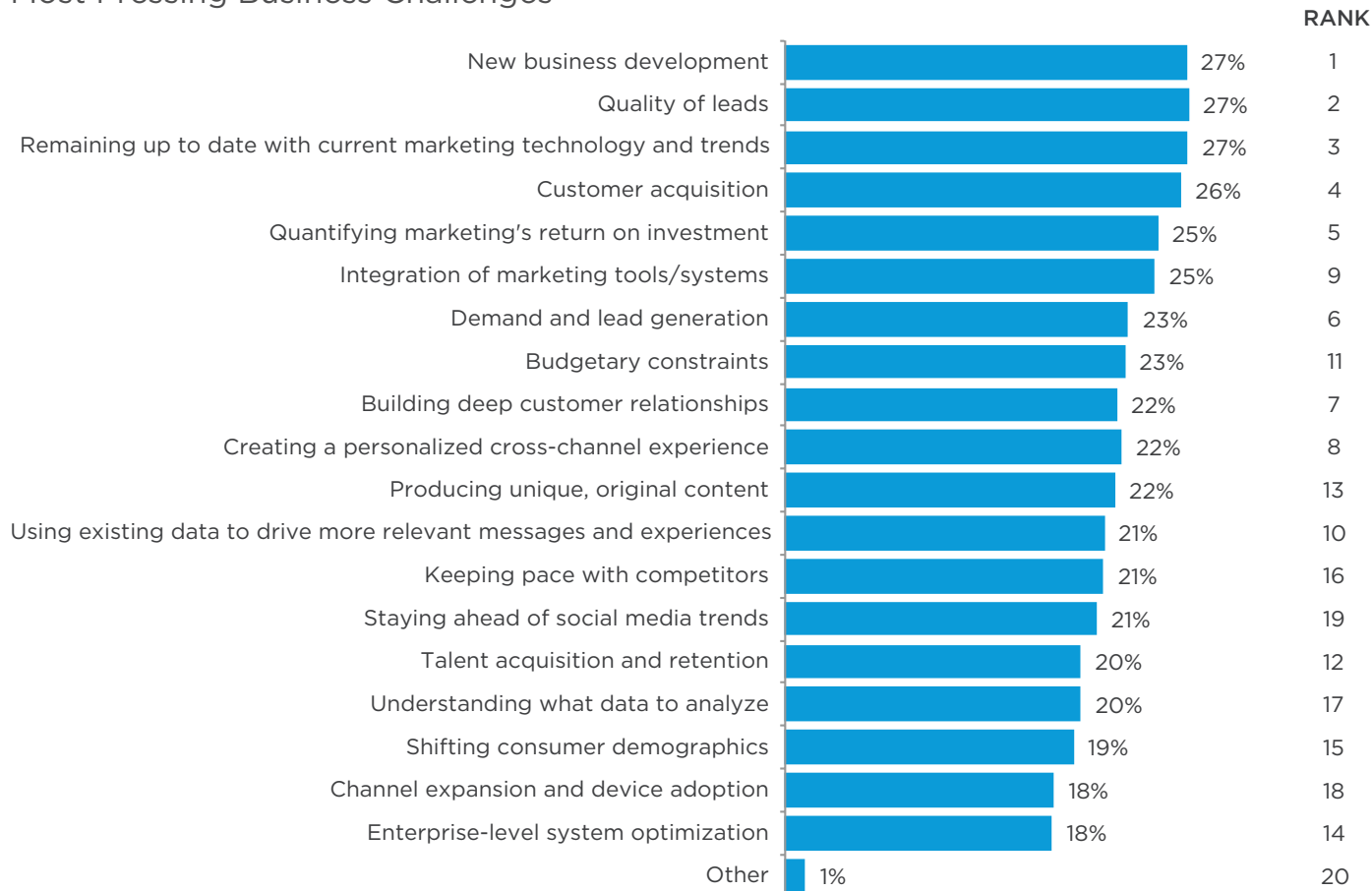
these techniques. For recommendations on how to make the most of the digital marketing channels and strategies you choose to pilot and implement in 2015, flip to the "Recommendations" section on p. 30 of this report.

Ranking the Top Obstacles

Digital channels can have long-lasting impact on ROI and audience growth, and an ever-greater number of marketers understand that nurturing the customer journey is crucial to growing a business (see the section “Using Technology to Craft the Customer Journey”). But with so many barriers to attracting consumer attention and a long list of responsibilities on marketers’ plates, reaching this ideal state of customer satisfaction and business success can be highly challenging. As part of this survey, we asked marketers to share the top challenges that they face while executing their marketing strategy.

Last year, our report asked about business challenges primarily in the context of email lifecycle marketing. This year, we expanded our focus to include business challenges that encompassed the entire customer journey, as shown in the following chart. We first asked marketers to select all of their most pressing business challenges from the list. Of the business challenges they selected, we then asked them to rank their top three business challenges, which are reflected in the rankings on the right side of the chart.

Most Pressing Business Challenges



Ranking the Top Obstacles

Three challenges tied for first place: new business development, quality of leads, and remaining up to date with current marketing technology and trends. Interestingly, challenges like budgetary constraints and uniqueness of content weren't among the most common challenges for marketers, indicating that marketing resources aren't necessarily strapped — it's more about filling the funnel with quality instead of quantity.

The challenge of staying updated with current technology and trends also makes sense as a top obstacle. Senior marketing leaders today

report a growing responsibility to teach their teams how to perform new functions and develop their marketing technology skills.










It's clear that marketers come up against a variety of challenging obstacles both internally at their companies (as in the case of quantifying marketing's ROI) and externally with their audiences (as with customer acquisition). See the recommendations at the end of this report for guidance on how to improve marketing results amid these challenges.

The biggest challenges of 2015 are new business development, quality of leads, and remaining up to date with current marketing technology and trends.

Banking on Social and Mobile

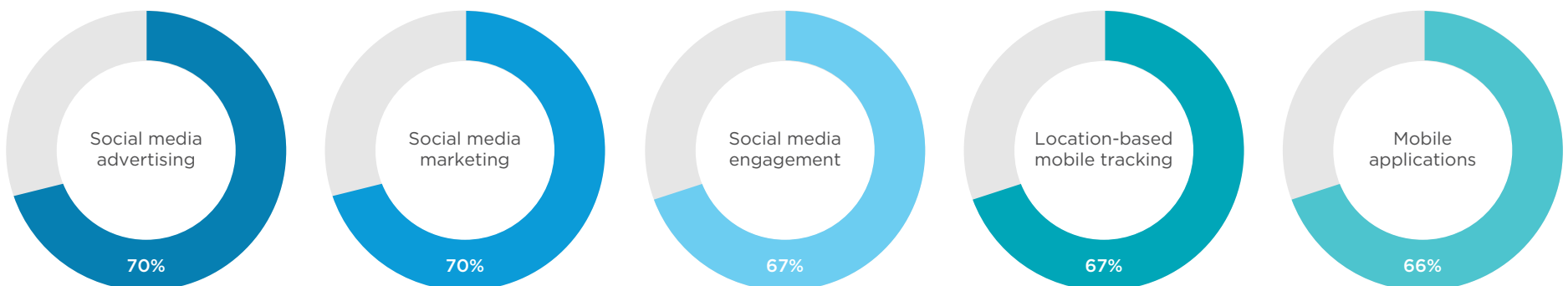
On average, 84% of respondents plan to increase or maintain their spend on marketing activities and technology in 2015. Marketers in the US plan to increase or maintain spend at the lowest rate of countries and regions surveyed (80%). The top spenders are Canadian and Brazilian marketers: 96% plan to increase or maintain their spend.

Take a look at the percentage of marketers in each country that plan to increase or maintain their overall marketing spend in 2015.

US	Canada	Brazil	Japan	Australia	UK	Germany	France	Nordics
								
N=3002	N=250	N=430	N=251	N=252	N=250	N=251	N=253	N=114
80%	96%	96%	81%	85%	88%	90%	90%	94%

Now that we understand who's planning to spend at higher rates, how will marketers use those larger budgets? One emerging area is online advertising. Surveyed marketers said they planned to shift 38% of their marketing spend from traditional advertising to digital advertising in 2015. B2C marketers plan to shift spend at a slightly higher rate, with 42% of B2C marketers planning to move traditional budget into digital vs. 34% of B2B marketers.

Marketers plan to spend more money on these five key areas in 2015 (percentages represent marketers who plan to increase spend on that activity).



Banking on Social and Mobile

These statistics point to 2015 as the year when marketers will truly bank on social and mobile. Contrast these five areas with those from our *2014 State of Marketing* report: data and analytics, marketing automation, email marketing, social media marketing, and content management, respectively, were the top five areas in which marketers planned to increase spend in 2014. Last year's results indicated that marketers were attempting a far-reaching focus on many areas of digital marketing, while marketers this year seem to be carefully choosing social and mobile as pillars in their strategy.

This decision to invest more financial resources in social and mobile makes sense, as 64% of marketers see social media marketing as a critical enabler of products and services and 70% see mobile marketing as a critical enabler of products and services. As customers increasingly switch between devices and expect brands to create real-time one-to-one connections, these increased social and mobile spends will help marketers take customers on a journey.

The goal of modern marketing is to elevate the customer experience across every channel. Marketers are now able to extend the customer journey in a powerful new way inside apps and across devices, creating personal brand experiences for every interaction with every customer.

64% of marketers see social media marketing as a critical enabler of products and services and 70% see mobile marketing as a critical enabler of products and services.

Why Is Mobile Marketing Core to Your Business?



- Our business' primary revenue source is directly linked to mobile marketing
- Mobile marketing is a critical enabler of our products and services
- Mobile marketing indirectly impacts our business performance

Why Is Social Media Marketing Core to Your Business?

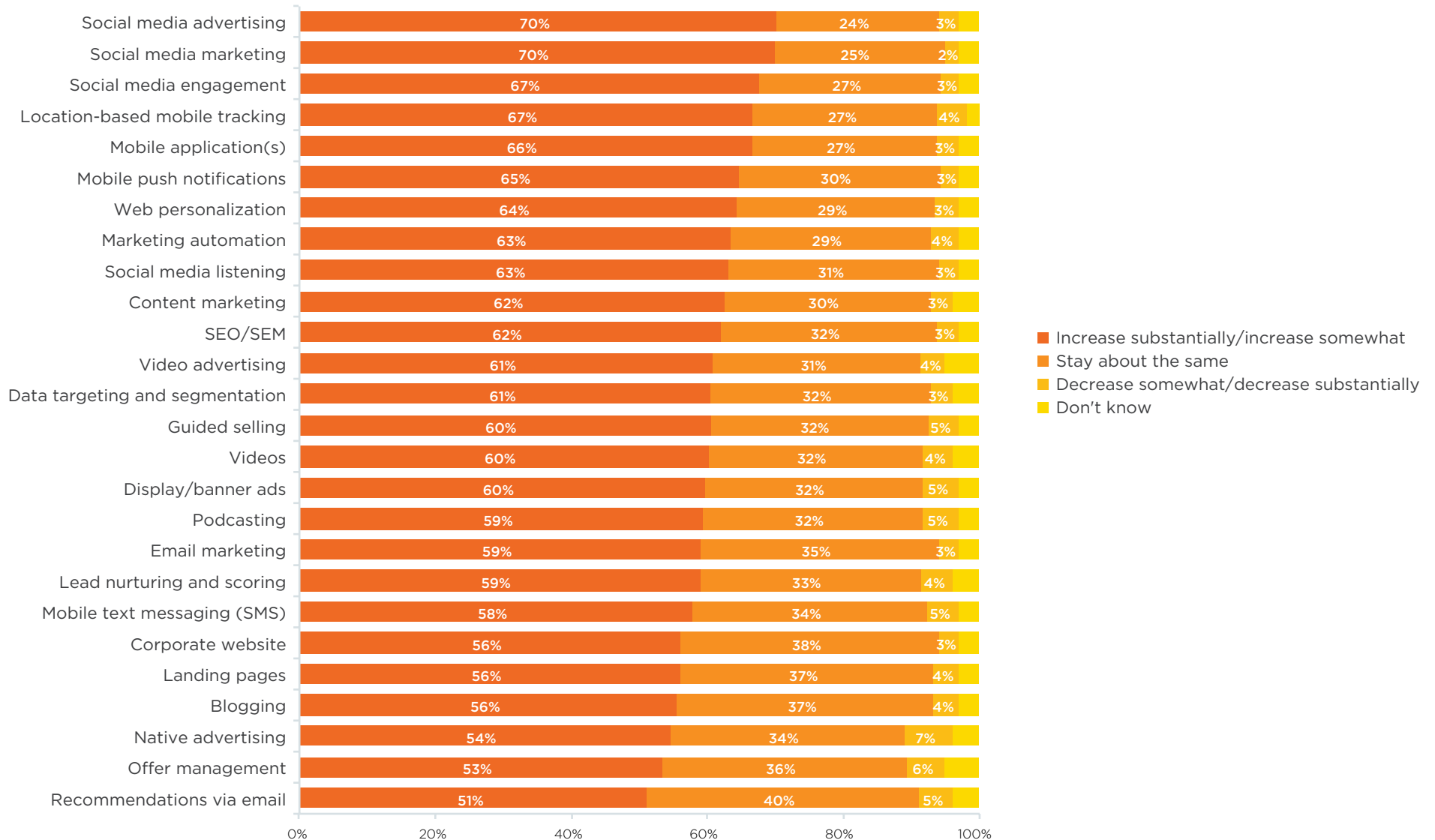


- Our business' primary revenue source is directly linked to social media marketing
- Social media marketing is a critical enabler of our products and services
- Social media marketing indirectly impacts our business performance

Banking on Social and Mobile

This chart provides a more detailed look at how marketers plan to spend money on various digital marketing technologies, and whether the amount spent will increase or decrease — with social and mobile leading the way.

Areas of Increase and Decrease in 2015 Budget



Using Technology to Craft the Customer Journey

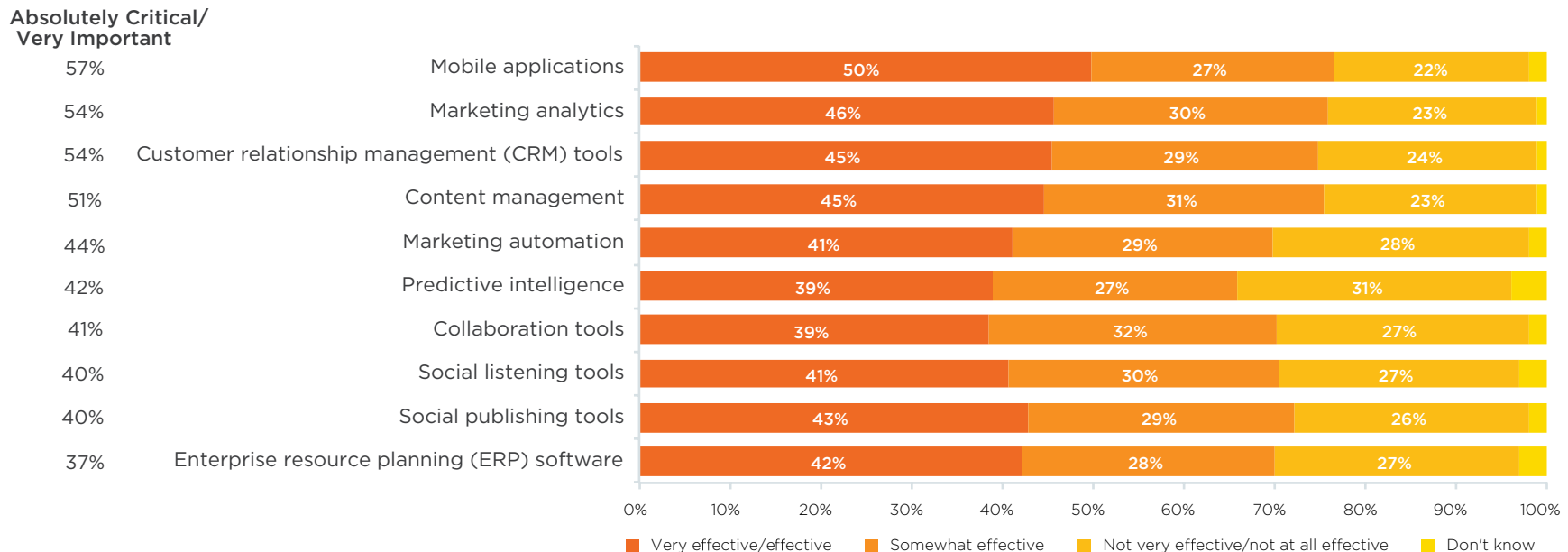
For the past 10 years, digital channels and data points have been accumulating at breakneck speed. Every industry has been disrupted. The customer now rules, and speed is the new currency of business. Marketers have scarcely had a moment to make sense of it all with a single big idea that ties everything together. Enter the customer journey. A growing number of marketers today are envisioning their entire marketing strategy under the umbrella of a cohesive customer journey, which we define as all of the interactions a customer has with brands, products, or services across all touchpoints and channels.

According to recent research, 86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey. Another 11% view the customer journey as moderately

important.² Technology is the essential glue that connects various moments along the customer journey to create one-to-one experiences. From analytics that help marketers create personalized interactions, to mobile applications that create personal brand experiences for every interaction, to CRM tools that let marketers track the span of a customer relationship, the customer journey relies completely on its technological elements.

The following chart shows which technologies marketers find most effective at creating a cohesive customer journey. The left column shows the percentage of marketers that rate that technology absolutely critical/very important to the customer journey.

The Effectiveness of Various Technologies at Creating a Cohesive Customer Journey



² The State of Marketing Leadership, Salesforce Marketing Cloud and LinkedIn, November 2014

Using Technology to Craft the Customer Journey

The three technologies rated as most critical and important to the customer journey were mobile applications, marketing analytics, and CRM tools. The best-rated technologies varied widely in their functionalities, from content management to social listening tools, demonstrating that customer journey touchpoints can transpire

anywhere and require specialized attention to meet customer needs. Consult the recommendations at the end of this report for specific suggestions on mapping and optimizing your customer journey.

Technologies Rated as Most Critical and Important to the Customer Journey

- #1 Mobile applications
- #2 Marketing analytics
- #3 Customer relationship management (CRM) tools

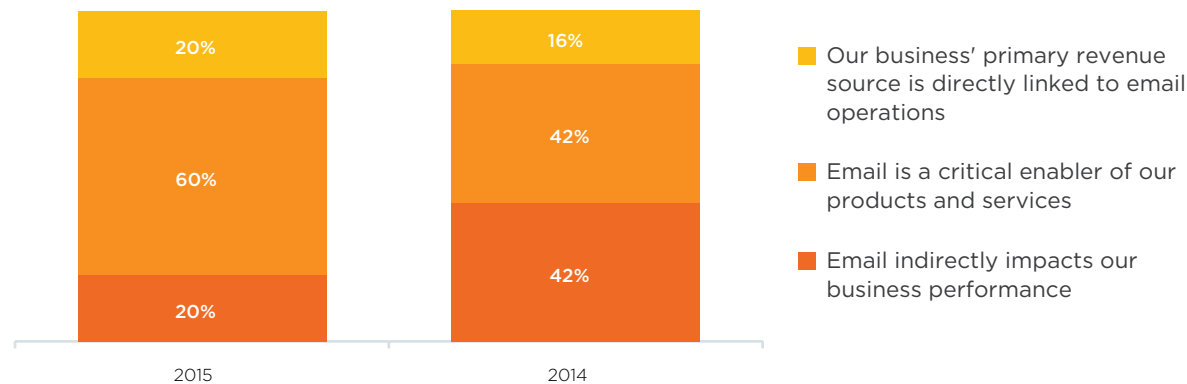
86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey.

Email Keeps a High Profile

Email is an integral touchpoint along the customer journey for the majority of marketers: 73% agree that email marketing is core to their business. We see that email's importance is on the rise when comparing 2014 to 2015 responses to the question, "Why is email core to your business?" Sixty percent of marketers in the 2015 survey said that email is a critical enabler of products and services vs. 42% of marketers in 2014.

Email's growing importance coincides with the increased popularity of smartphones, which offer consumers a constant inbox in their pocket. One-third of marketers said their subscribers read emails on mobile devices at least 50% of the time. (See the next section for more on mobile email trends.) Fifty-nine percent of marketers plan on increasing their email marketing budgets in 2015, hoping to give subscribers more email content and a better experience on their mobile devices.

2015 vs. 2014: Why Is Email Core to Your Business?

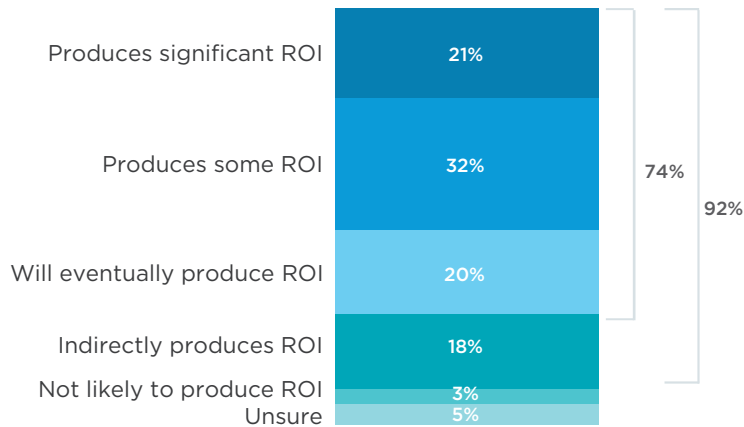


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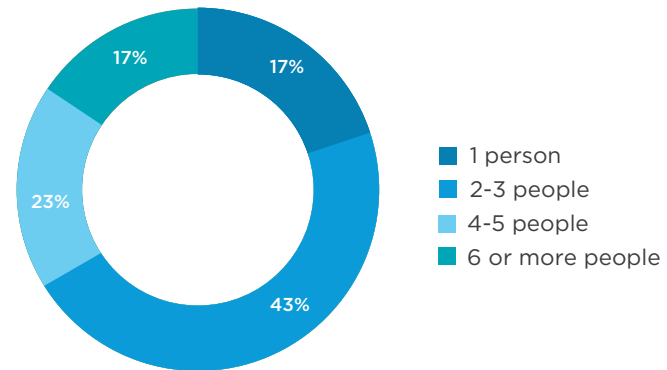
Email Keeps a High Profile

To support more ambitious email efforts, email marketing teams are getting bigger, as revealed in the chart “Email Team Size.” The following charts depict the current email marketing landscape, from ROI to annual send volume.

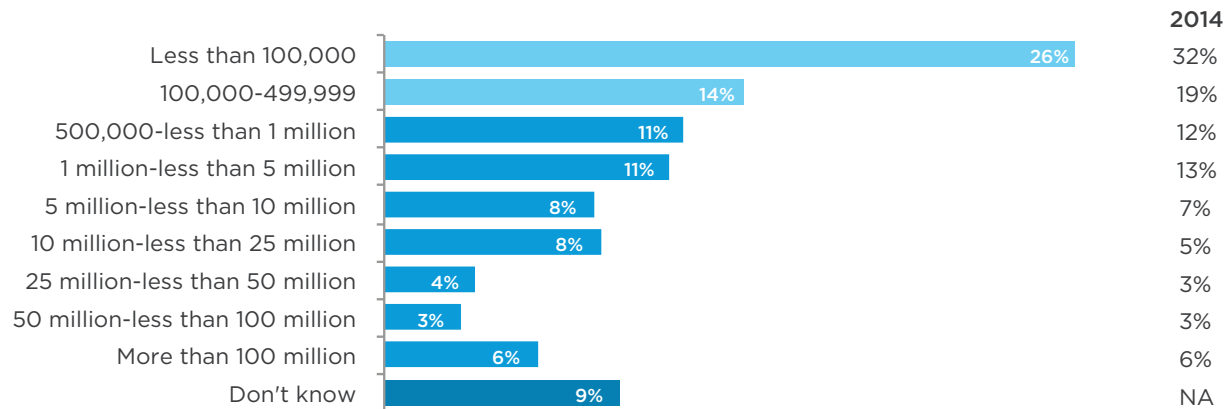
Is Email Marketing Producing ROI?



Email Team Size



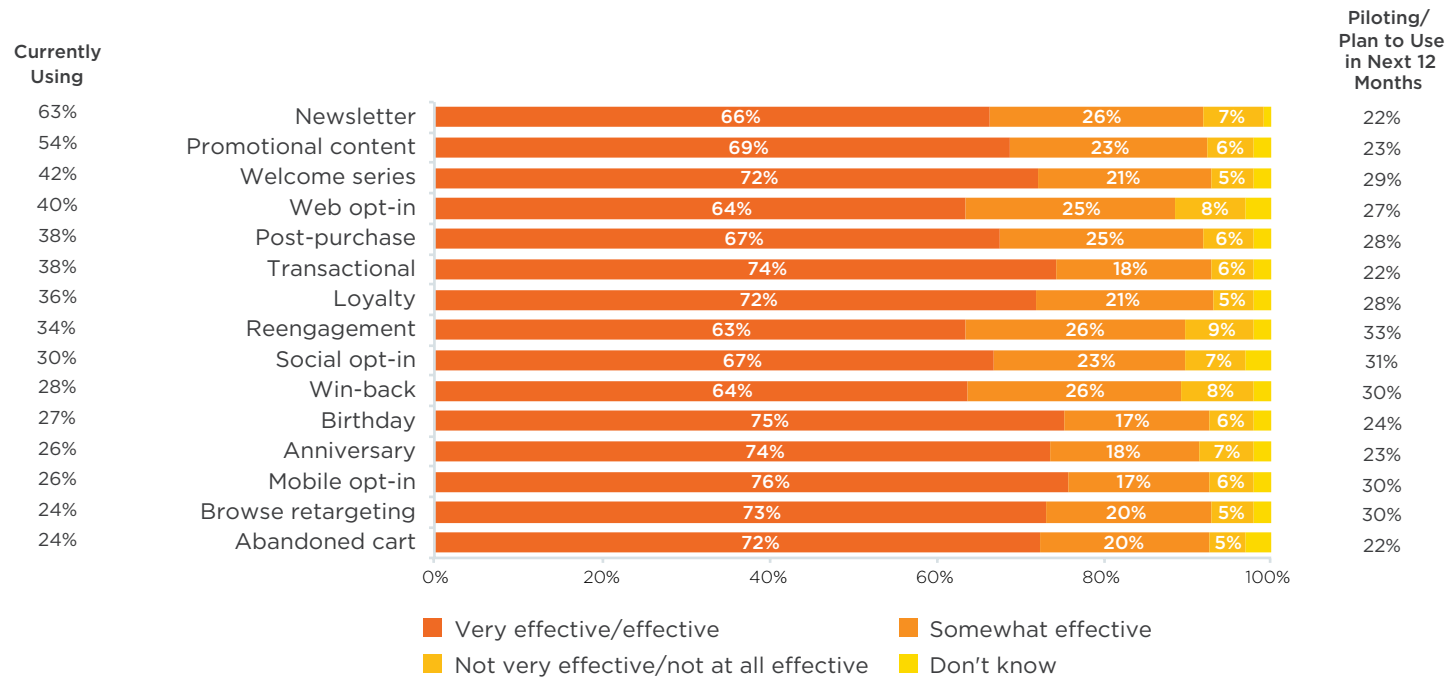
Annual Send Volume



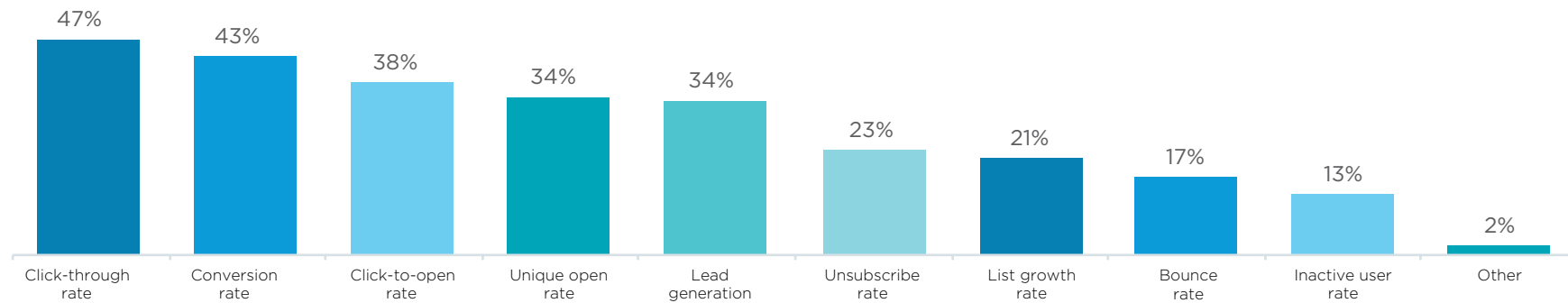
Email Keeps a High Profile

We asked marketers to share which email campaigns they use and how effective they find these campaigns. Newsletters are used most often; however, they rank lower for overall effectiveness. Conversely, mobile opt-in campaigns are rated the most effective, but are not widely used. Looking for ways to create and measure better email campaigns based on this data? See the recommendations on email at the end of this report.

Usage Rates of Email Marketing Campaigns and Their Effectiveness

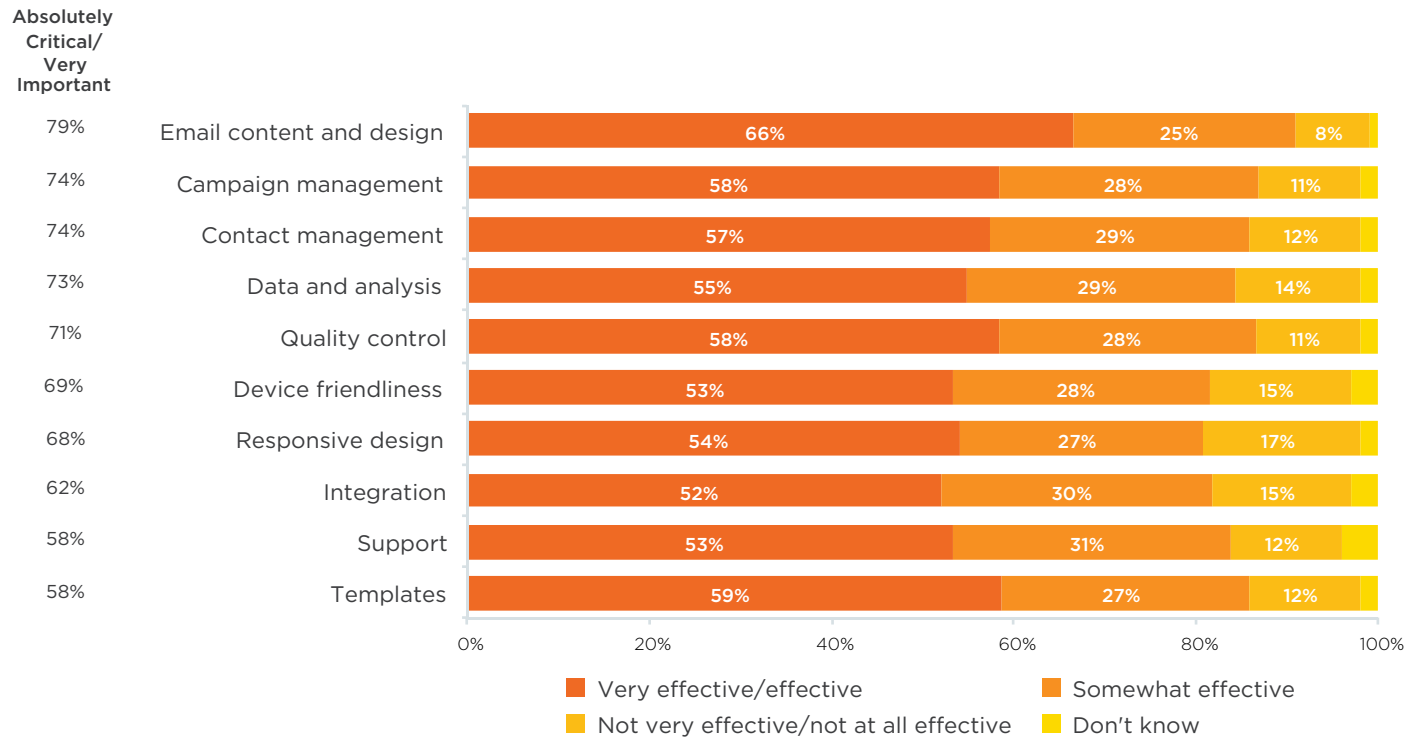


Metrics Used to Measure Email Marketing Success



Email Keeps a High Profile

The Importance and Effectiveness of Email Features



Raising the Stakes on Responsive Design

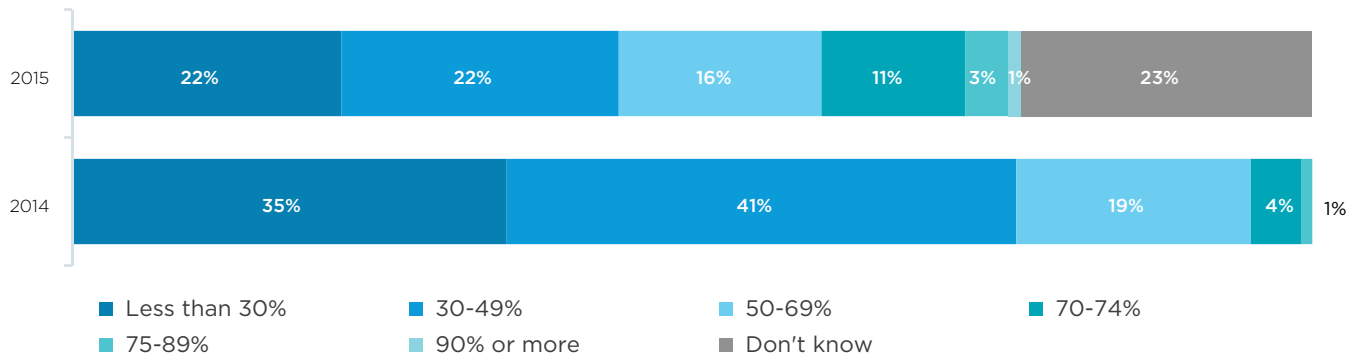
If you've been paying attention to your email analytics lately, you don't need convincing that mobile email is now the rule — not the exception. Take a glimpse of the state of mobile email:

- 72% of US online adults send or receive personal emails via smartphone at least weekly.³
- Nine countries likely surpassed 50% mobile penetration in 2014.⁴
- Responsive design can lead to a 130% increase in email clicks.⁵

2015 State of Marketing survey respondents confirmed the mobile email trend, as we tracked substantial growth from last year to this year in the number of subscribers who read emails on mobile devices. This year, 33% of marketers said their emails are read on a mobile device at least 50% of the time; last year, it was 24%.

Note on charts below: due to rounding, totals don't equal 100%. In 2014, we didn't provide a "don't know" option on this question.

Volume of Subscriber Emails Read on a Mobile Device



³Brief: Email Marketing Gets Responsive, Forrester, May 2014

⁴Worldwide Smartphone Usage to Grow 25% in 2014, eMarketer, June 2014

⁵Responsive Design A/B Testing Leads to a 130% Increase in Clicks, Litmus, November 2014

Raising the Stakes on Responsive Design

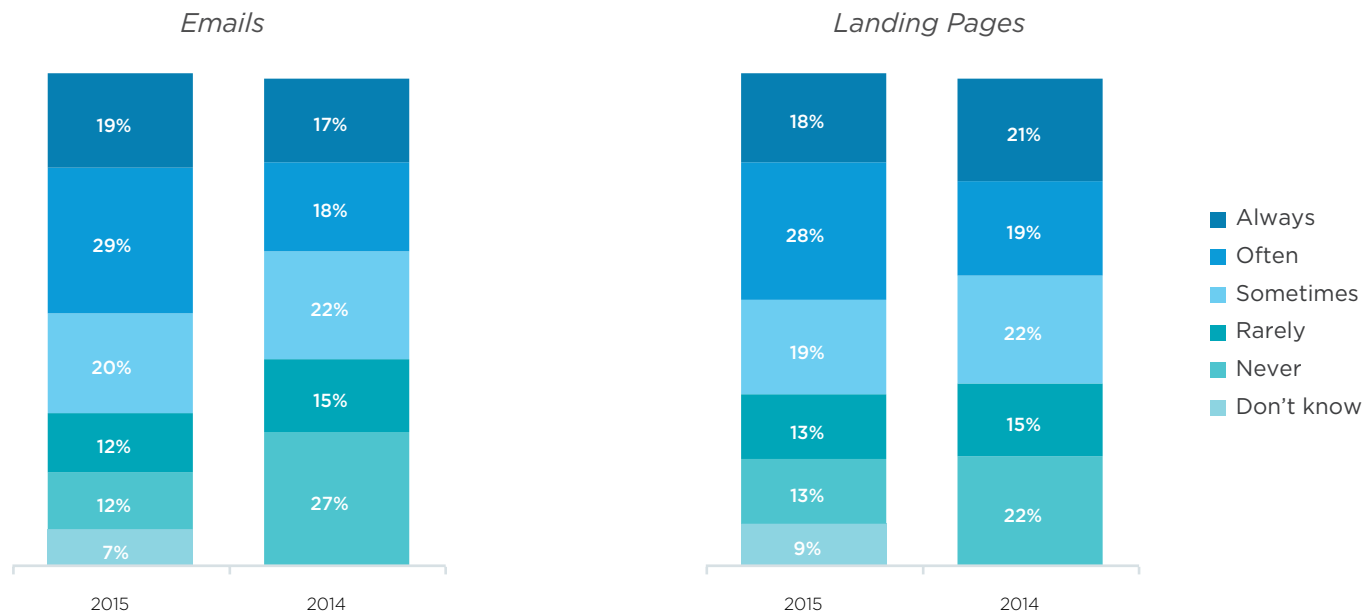
Another area of growth in 2014 was the number of marketers who currently use responsive design in emails and landing pages. In our 2014 research, 42% rarely or never used responsive design in emails; this year, only 24% of marketers use it rarely or never. Additionally, 46% of marketers report using responsive design in landing pages often/always in 2015, compared to 40% in 2014.

Sixty-eight percent of marketers view responsive design as absolutely critical/very important to building email marketing campaigns — a sign that marketers are listening to the analytics and understanding that the mobile inbox is mission-critical. Yet 17% relate that they're still struggling

to effectively design responsive emails. If you're among that 17%, make it a priority in 2015 to not only appreciate the importance of responsive design, but also become highly effective at implementing it.

You can get the ball rolling by providing your designers with educational resources to help them learn. You may also consider hiring a temporary designer who's skilled in this area to show your team the ropes. Read our email recommendations at the end of this report for more ideas on responsive design implementation.

Usage Rates of Mobile Responsive Design

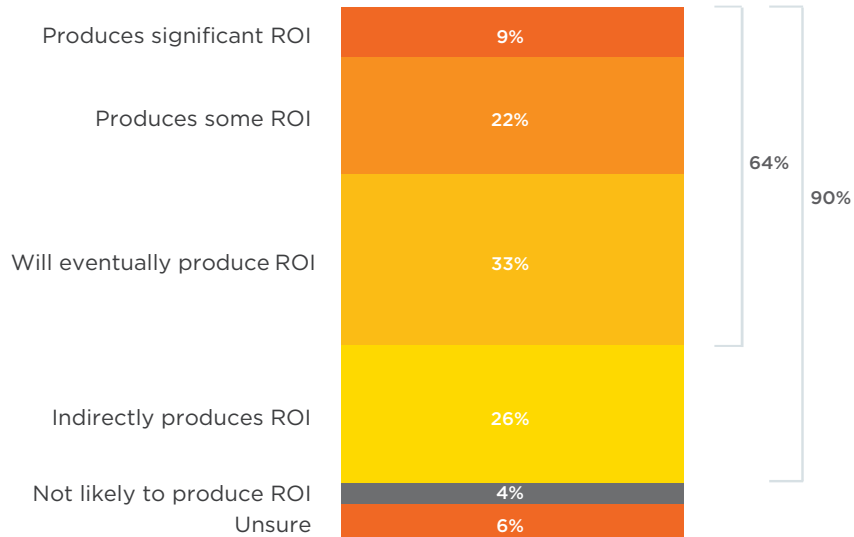


The Year of Mobile Has Arrived — for Real This Time

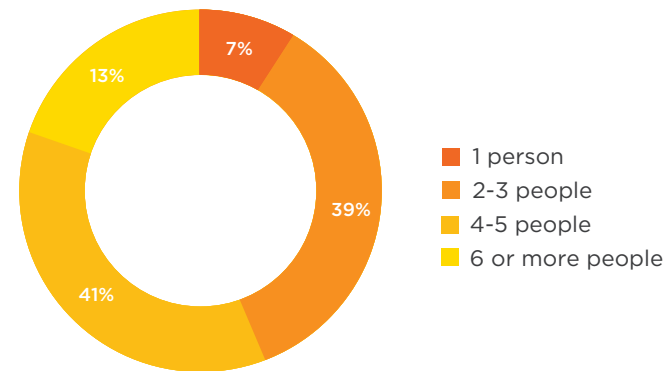
Last year, a Forbes article declared 2014 “the third annual year of mobile.”⁶ Marketers cry “mobile” like the boy who cried “wolf,” but this year, it’s looking like the real thing. For starters, 46% of marketers surveyed are using some form of mobile marketing — either SMS, push notifications, mobile apps, or location-based functionality — compared to only 23% in our 2014 report.

Marketers are shifting their focus to deliver more tailored, one-to-one mobile interactions. Fifty-eight percent of marketers have a dedicated team to manage their company’s mobile marketing program, up from 35% in 2014. Seventy percent of marketers using mobile say it’s a critical enabler of products or services, a 13% jump from last year. With smartphones quickly becoming the number-one Web access device, every touchpoint along the customer journey must be planned with a mobile-first mindset.

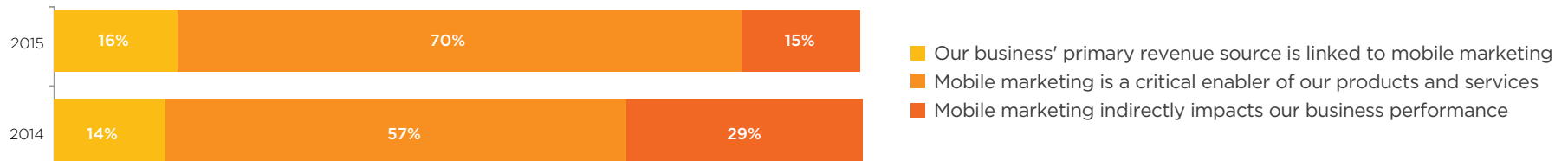
Mobile Marketing Return on Investment



Mobile Marketing Team Size



Mobile Marketing Impact on Business



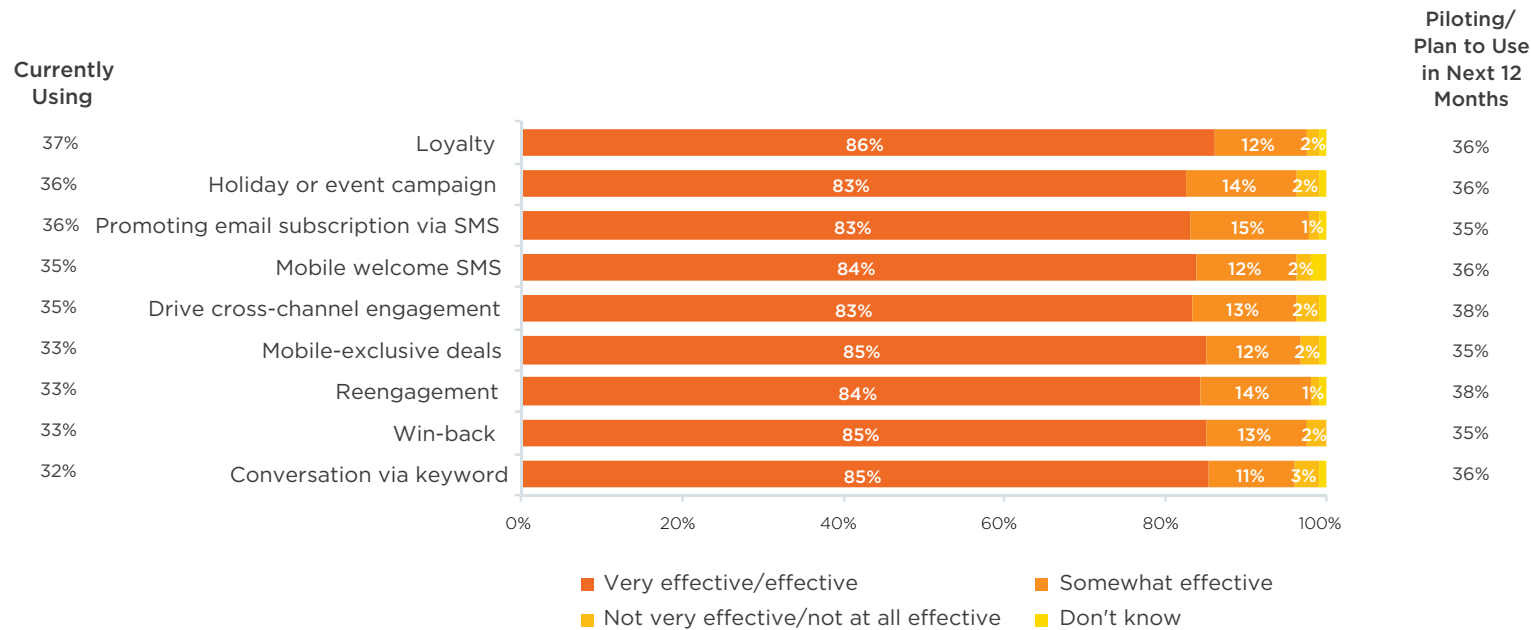
⁶<http://www.forbes.com/sites/kimberlywhitler/2014/02/06/is-2014-finally-the-year-of-mobile/>

The Year of Mobile Has Arrived – for Real This Time

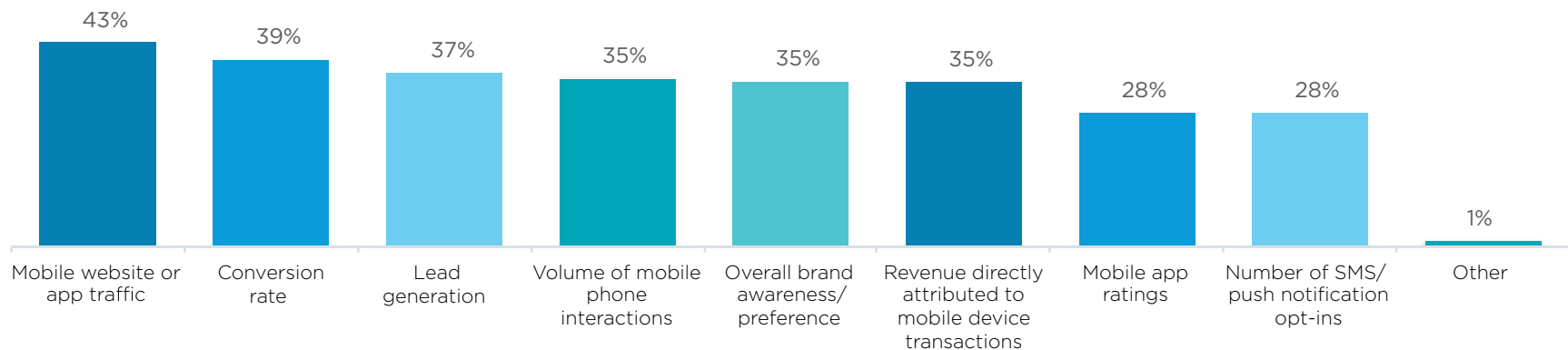
With this rise in mobile activity, how are marketers actually using the channel? Mobile loyalty campaigns are the most widely used and the most effective type of mobile campaign, as ranked by marketers.

Overall, a majority of marketers using mobile rated all campaign types as highly effective, further supporting mobile's crucial position in marketing strategy.

Mobile Campaign Popularity and Effectiveness



Metrics for Measuring Mobile Marketing Success

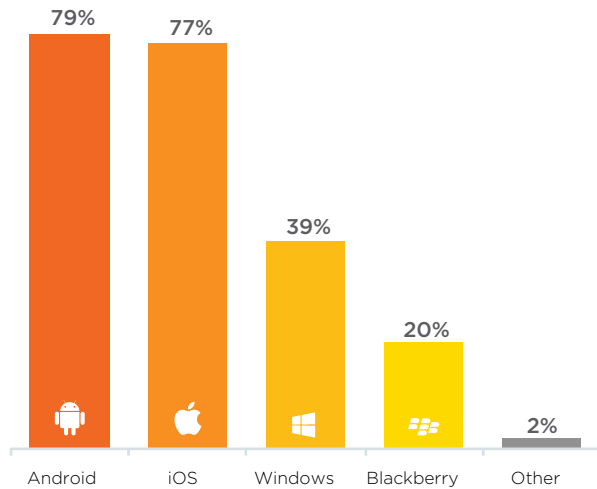


The Year of Mobile Has Arrived – for Real This Time

By and large, marketers measure mobile marketing success by mobile website or app traffic. In this research, we see that 27% of marketers have a mobile application, with support for Android slightly edging out

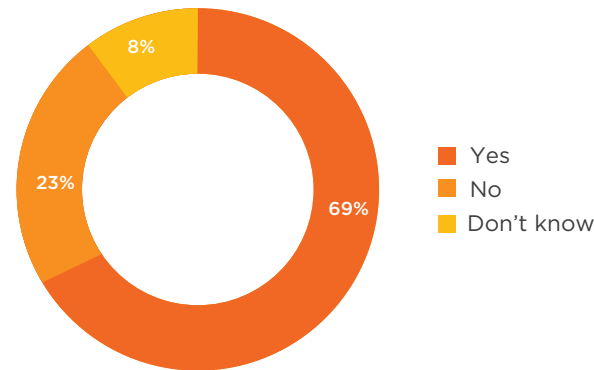
iOS support (79% and 77%, respectively), as shown in the following chart. Another 34% of marketers are piloting or planning to create a mobile application in the next 12 months.

Mobile App Support for Operating Systems



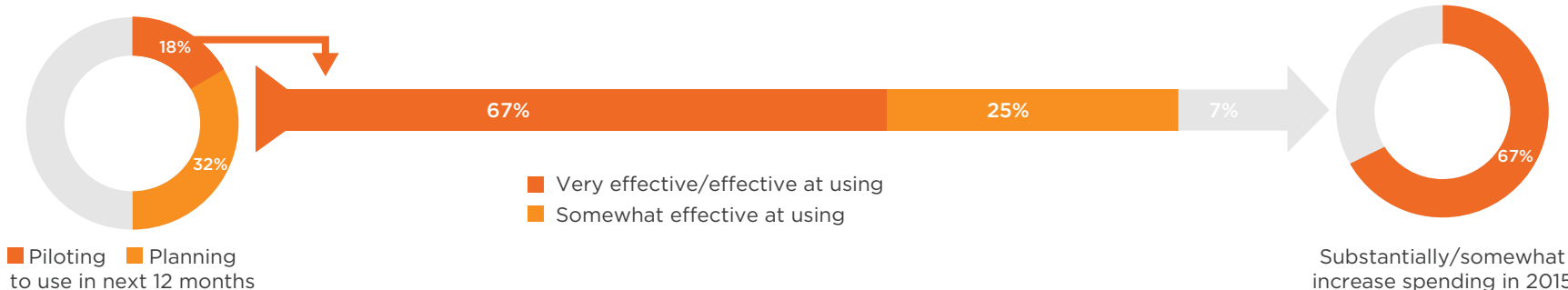
From our *2014 Mobile Behavior Report*,⁷ we know that 76% of smartphone users agree that location sharing provides more meaningful content, and 73% believe location sharing is somewhat or very useful. Among smartphone and tablet owners, 79% have allowed location sharing when using an app and 70% allowed push notifications. Despite this interest from the consumer side, marketers

Marketers Tracking Mobile App Analytics



have just started dipping a toe into the geolocation pool: only 18% currently use location-based functionality in their marketing. Because location-based marketing is still in the early stages of adoption, and because it can be a disruptive form of communication (for better or worse), marketers are approaching with care.

Marketers Using Location-Based Tracking



⁷Mobile Behavior Report, Salesforce Marketing Cloud, February 2014

Small Screen, Big Impact: Integrating Mobile

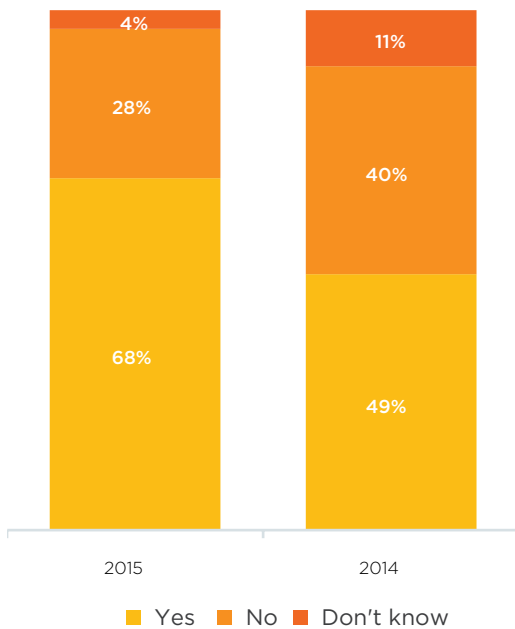
A successful customer journey requires integrating mobile into your marketing strategy. Among marketers using mobile channels, 68% have integrated mobile marketing into their overall strategy — meaning they've incorporated either SMS, push notifications, mobile apps, or location-based functionality. Sixty-one percent rate the integration as very effective or effective (compared to 46% last year) and 32% rate it as somewhat effective.

Those who haven't integrated mobile cite their number-one challenge as creating a personalized cross-channel experience (one-to-one customer journey). For those who have integrated mobile, this concern isn't even listed in the top five challenges. In other words, integrating mobile is a major step to delivering the personalized brand experiences that customers expect today. As it stands, B2C companies are far more likely than B2B companies to have integrated mobile marketing into their overall marketing strategy. See more detailed B2B and B2C data on p. 47.

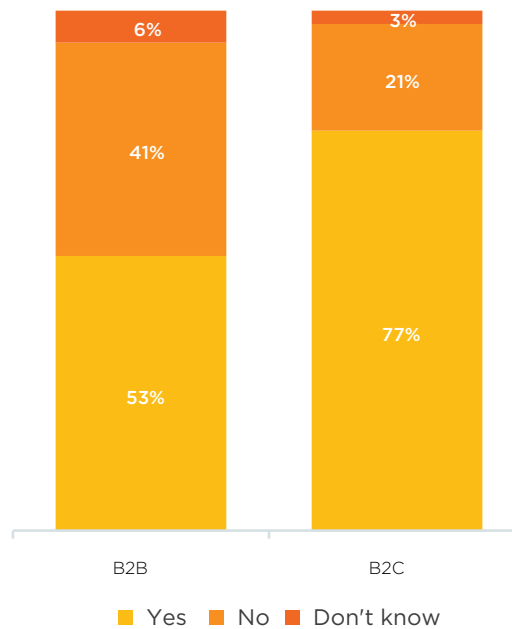
When we look at the top challenges of B2C marketers, the difference between the mobile integration “haves” and “have-nots” paints a clear

Have You Integrated Mobile Marketing Into Your Overall Marketing Strategy?

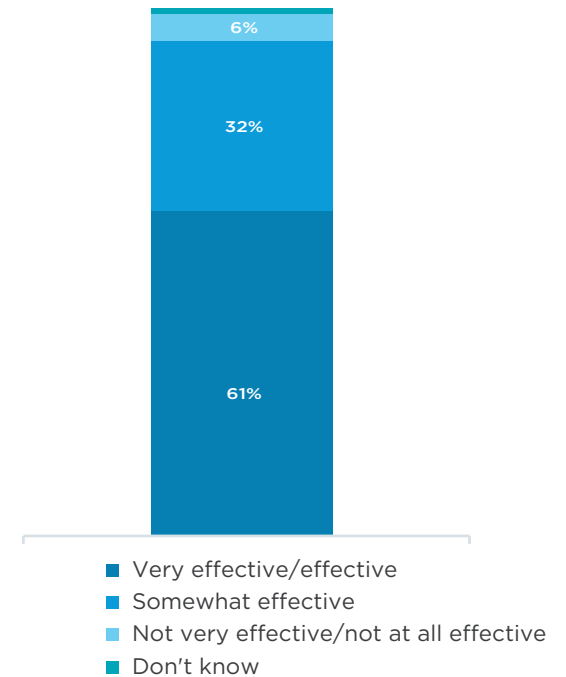
2015 vs. 2014



B2B vs. B2C



Effectiveness of Mobile Marketing Integration



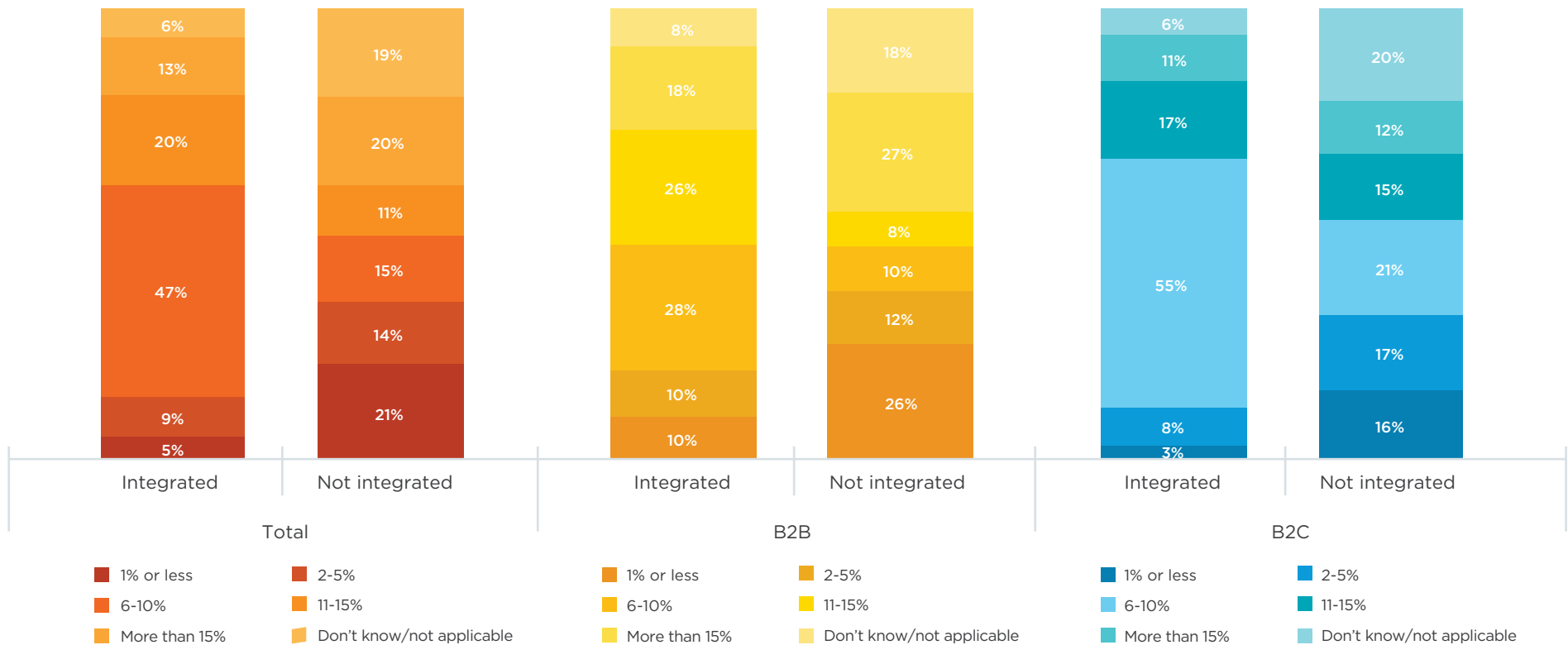
Small Screen, Big Impact: Integrating Mobile

How Mobile Integration Affects Marketers' Challenges

	Total		B2B		B2C	
	Integrated	Not integrated	Integrated	Not integrated	Integrated	Not integrated
1	New business development	New business development	New business development	New business development	Enterprise-level system optimization	Creating a personalized cross-channel experience
2	Enterprise-level system optimization	Quality of leads	Remaining up to date with current marketing technologies	Demand and lead generation	New business development	Remaining up to date with current marketing technologies
3	Remaining up to date with current marketing technologies	Remaining up to date with current marketing technologies	Customer acquisition (audience and/or list growth)	Quality of leads	Quantifying marketing's return on investment	Quality of leads

Marketers who have integrated mobile with their overall marketing approach see significant increases in marketing effectiveness. As marketers integrate mobile into their overall marketing strategy, the volume of mobile sales dramatically increases. In terms of sales occurring on mobile devices, nearly twice as many of those who have integrated mobile see 6% or more in mobile sales (79% of mobile integrated vs. 46% of not mobile integrated).

Percentage of Sales Occurring on Mobile Device by Mobile Integration

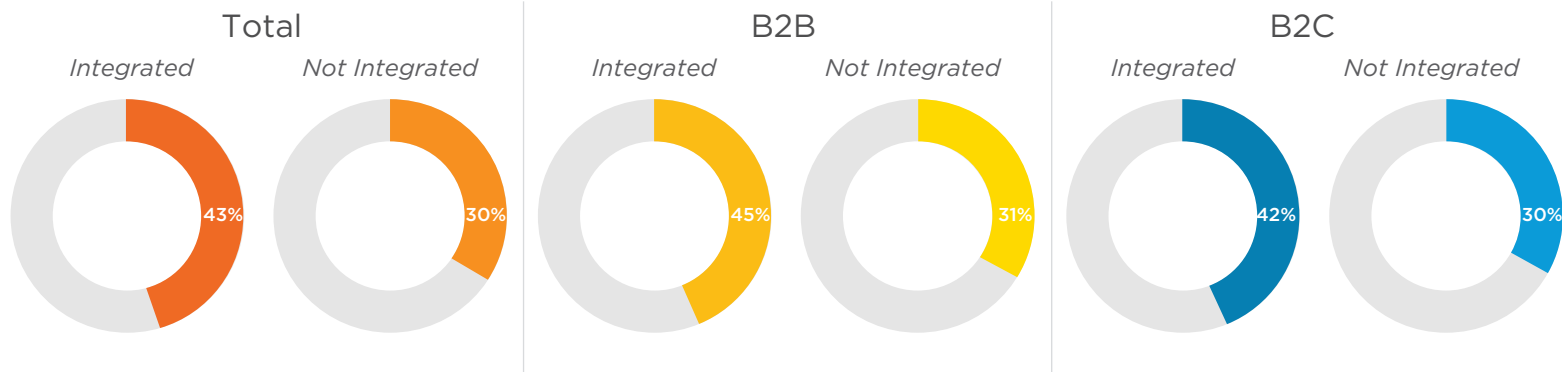


Small Screen, Big Impact: Integrating Mobile

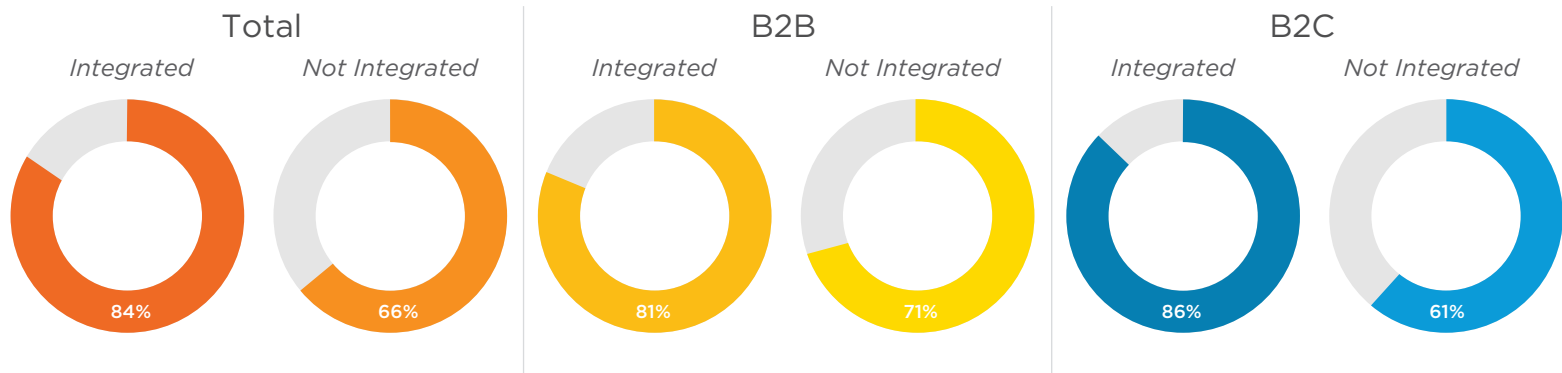
As mobile impacts sales, it also impacts spending on marketing activities. Marketers who have integrated mobile are shifting more of their marketing spend from traditional advertising to digital channels like mobile app ads, social ads, and display ads. Additionally, the total spend dramatically increases as marketers integrate their mobile marketing; this is perhaps a cyclical trend, where increased ROI from mobile integration fuels increased spending, so on and so forth. Among marketers who have fully integrated mobile, 84% are increasing their total digital spend substantially/somewhat, compared to 66% for those who haven't integrated mobile.

A rising tide lifts all ships — and this tide is mobile integration. Marketers who have committed to mobile integration rate all implemented technologies — from CRM to social listening tools — as more effective across the board. This pattern further supports the idea that mobile can't be treated as an isolated channel, but rather as a key component of the customer journey and enabler of other channels. Similarly, as marketers integrate mobile into their overall strategy, effectiveness of individual channels also rises, as seen in the chart on p. 25. In short, when mobile is integrated, all marketing technologies and channels become more effective.

Marketers Shifting from Traditional Advertising to Digital Channels by Mobile Integration

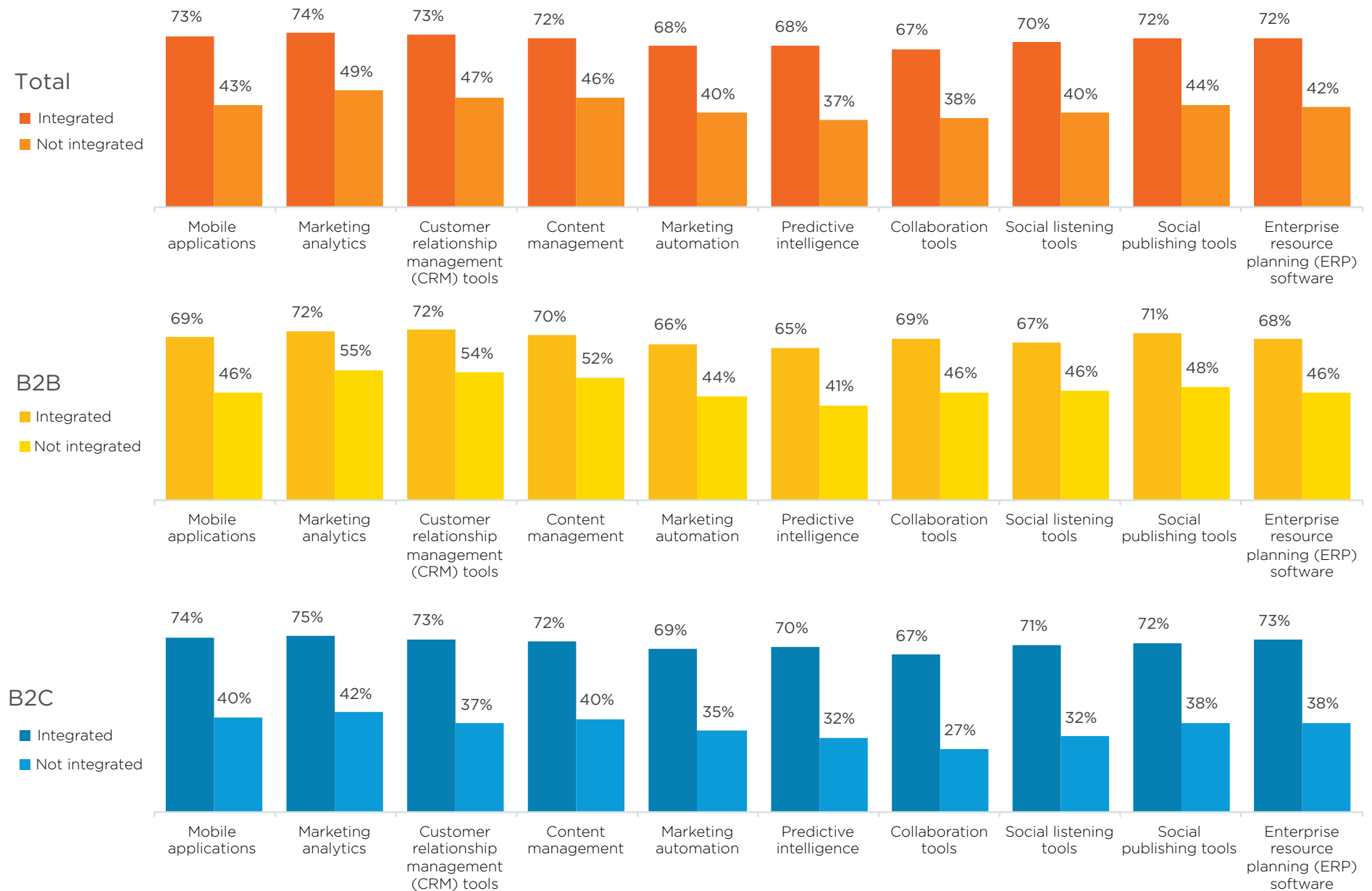


Marketers Increasing Total Digital Spend Substantially/Somewhat by Mobile Integration



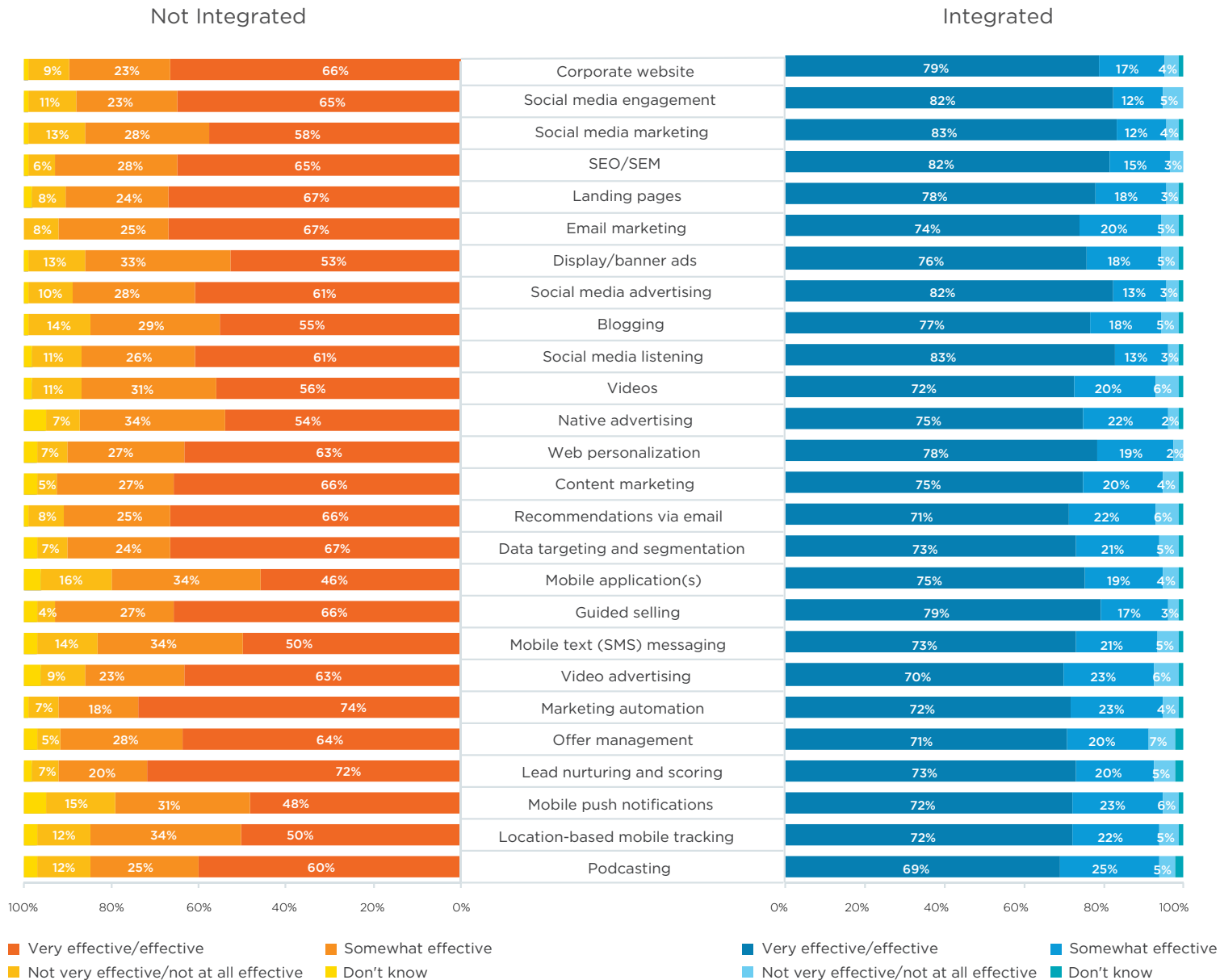
Small Screen, Big Impact: Integrating Mobile

Technologies Rated Very Effective/Effective by Marketers, Mobile-Integrated vs. Not Integrated



Small Screen, Big Impact: Integrating Mobile

Effectiveness of Channels and Strategies, Mobile-Integrated vs. Not Integrated



Marketers Who Have Dedicated Digital Teams by Channel

EMAIL	
Integrated	Not Integrated
N=827	N=521
78%	42%

MOBILE	
Integrated	Not Integrated
N=1562	N=650
79%	14%

SOCIAL	
Integrated	Not Integrated
N=1398	N=515
86%	38%

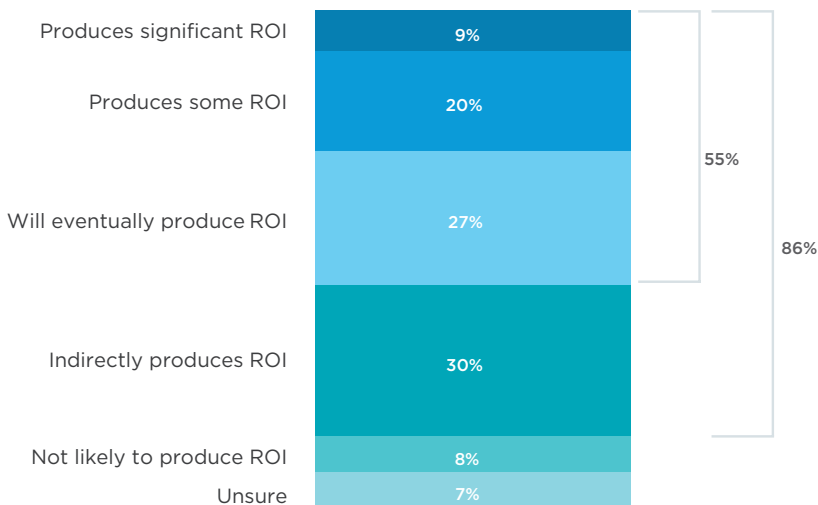
Social Takes the Spotlight

In the last year, social media marketing has graduated from understudy to headliner, and the numbers prove it:

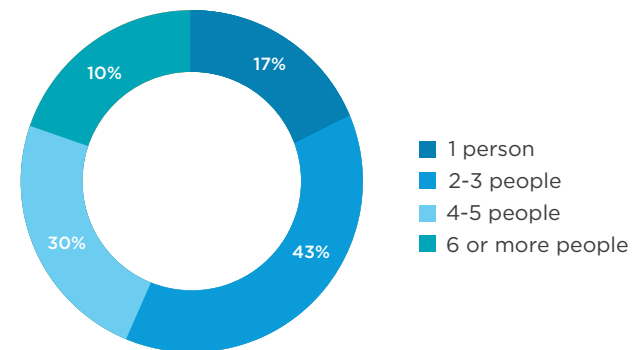
- While 25% of marketers in 2014 saw social as a critical enabler of products and services, that number leaps to 64% in this year's research.
- Sixty-six percent of marketers agree that social media marketing is core to their business.
- In 2015, nearly twice as many marketers categorize social as a primary revenue source vs. 2014.

As such, social budgets are on the rise. Marketers are increasing their budgets for social more than any other digital marketing channel in 2015. Sixty-six percent of marketers now have a dedicated team to manage their company's social media marketing programs, a 9% increase from 2014. The size of those teams is substantially increasing as well, as indicated in the chart below.

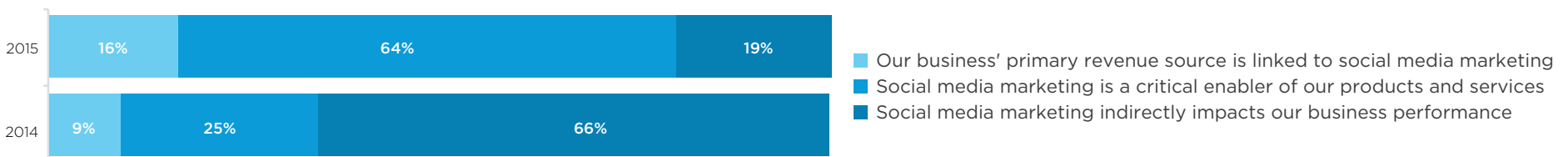
Social Media Marketing Return on Investment



Social Media Marketing Team Size



Social Media Marketing Impact on Business



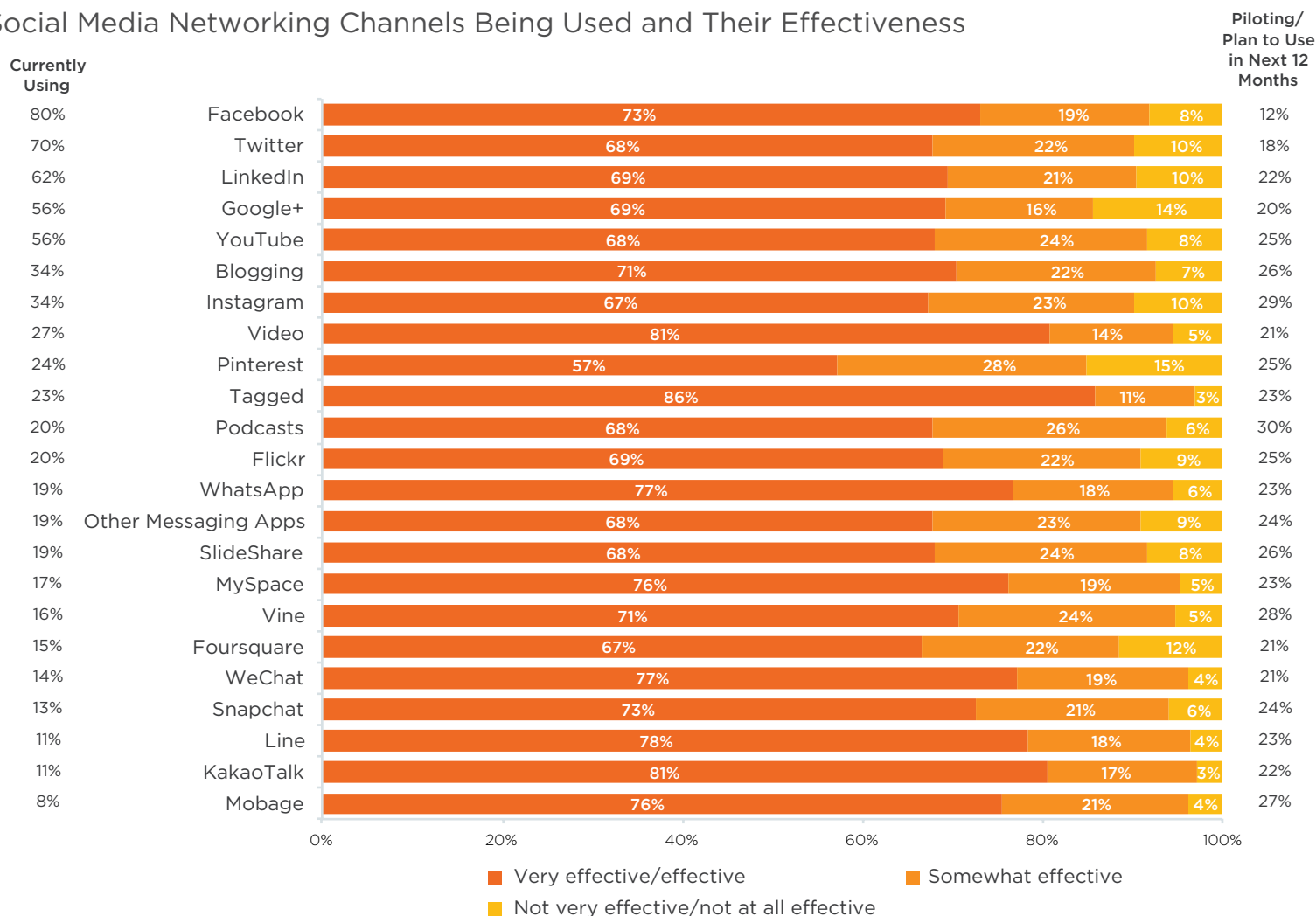
Social Takes the Spotlight

Facebook continues to be the most popular social channel for marketers to engage customers around the world. Marketers are also seeing great success with newer social channels such as Tagged, a social discovery website that reports 300 million members, and Viadeo, a social network

geared toward professionals with 65 million members. For all the talk about Pinterest, this channel scored relatively low in current usage (24% use Pinterest for marketing), with only 57% of marketers ranking it as very effective/effective.

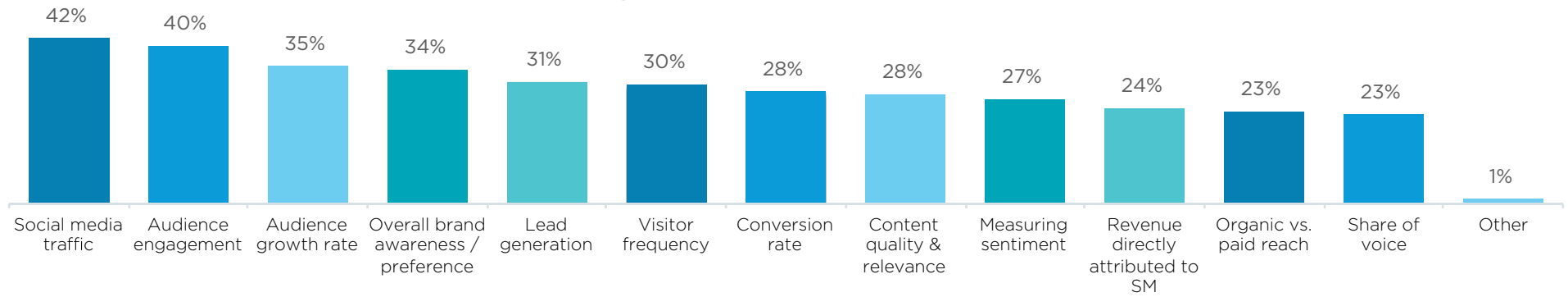
Marketers are increasing their budgets for social more than any other digital marketing channel.

Social Media Networking Channels Being Used and Their Effectiveness



Social Takes the Spotlight

Metrics Used to Measure Social Media Marketing Success



Recommendations

2015 Recommendations

This year's *State of Marketing* research makes it clear that marketers view digital channels as critical enablers of their companies' products and services, and many of these channels are now core to business functions. If you'd like to make this report's data more actionable in your 2015 strategy, consider these recommendations.

Be aware of these key differences between marketing in 2014 and 2015.

- Last year, the top areas in which marketers planned to increase spend were scattered across multiple disciplines. In 2015, the top five areas all relate to social and mobile channels. Make 2015 the year that your social media and mobile marketing activities mature into powerful customer journey touchpoints.
- Email marketing should be integral to your campaigns this year. Sixty percent of marketers in 2015 said that email is a critical enabler of products and services vs. 42% of marketers in 2014.
- In our 2014 research, 42% of respondents rarely or never used responsive design in emails. This year, only 24% of marketers used responsive design rarely or never. Small-screen friendliness must become part of every visual element in your marketing strategy.
- Mobile integration should also be a key focus. The "Small Screen, Big Impact" section shares compelling evidence that mobile integration is an all-around win: marketers who have integrated mobile (68% in 2015 vs. 49% in 2014) report all other marketing technologies and marketing channels as more effective.

Make every experience mobile.

- The number-one most pressing business challenge for today's marketer is new business development. Where is that new business hiding? On smartphones and tablets, which are increasingly responsible for a bigger portion of all time spent online.
- Landing pages, your corporate website, an app, social media, and especially email — all of these are opportunities to offer customers a fully optimized, accessible mobile experience.

Invest in advertising strategically.

- More than ever, the time has come to evaluate the money you're spending on offline advertising with indefinable results. This year, 38% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.
- Seventy percent of marketers plan to invest more money in social media advertising next year, making it the number-one area in which they plan to invest more budget (tied with social media marketing). Realize that spending more money on social media won't work if your social presence is negligent or too self-promotional, so advertising and organic content must work in tandem.

2015 Recommendations: Email

Evaluate email's role in the customer journey.

- Subscribers keep their inboxes close, whether in their pocket or an always-open browser tab. Email can guide subscribers through many stages of the customer journey, but first evaluate the journey you're currently leading them on.
- Recognize that your work schedule won't always coincide with your subscribers' email-reading habits. Explore sending campaigns over the weekend, when subscribers may have more leisure time to peruse their personal email accounts and non-urgent messages.
- Ask the following questions as you map your email touchpoints: Are you sending too many welcome messages early on, but too few retention emails? Are your communications steady throughout the journey, or do they appear randomly whenever you're running a new campaign? How can the email customer journey become more one-to-one instead of one-to-many?

Catch up with your subscribers. Design responsively.

- Like the marketers surveyed, you likely saw a rise in the percentage of mobile email opens compared to desktop opens last year — possibly even a two-digit increase. Subscribers are voting for responsive design with every click, so if you're not already designing an easily navigable experience on mobile, it's high time.
- Don't forget tablets. Just as you should be designing for various smartphone devices, the tablet environment is another critical area for responsive design improvement.

Breathe new life into email campaigns.

- Email has been around longer than social and mobile, but that doesn't mean your campaigns have to be old-school. When it comes to email, many marketers aren't trying new campaigns that rank extremely high in effectiveness, instead relying on old standbys. For example, newsletters are used most often but rank lower on overall effectiveness. Mobile opt-in campaigns are rated the most effective, but only 26% of marketers use them.
- Other email campaigns with low usage but high effectiveness ratings include abandoned cart (24% use; 93% rate as at least somewhat effective), browse retargeting (24% use; 93% rate as at least somewhat effective), and anniversary (26% use; 91% rate as at least somewhat effective). Some of these campaigns take extra effort to implement, but they may deliver your best email conversion rates.
- Try spring-cleaning your email. Send a reengagement campaign that invites subscribers to update their preferences and gain more control over the type and frequency of messages they're receiving. Make it easy for seasonal subscribers who are interested only in your holiday deals to unsubscribe without resorting to the spam button.

2015 Recommendations: The Customer Journey

Step away from lifecycle marketing and personas.

- Lifecycle marketing looks at broad terms like need, awareness, consideration, selection, and purchase. A cohesive customer journey looks at the unique people interacting with your messages and profiles, personalizing the journey based on their actions and preferences.
- Personas can be useful when trying to imagine how common types of customers may respond to your marketing, but aim for a single view of each customer instead of thinking too broadly.

Evangelize the customer journey in your organization.

- Do your colleagues know that 86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey, and another 11% view the customer journey as moderately important?⁷ Stress the industry-wide importance of this approach to marketing in 2015.
- Host a customer journey-mapping brainstorm for coworkers with a whiteboard and an open mind. Invite team members from different sides of the organization—including sales, product, and services—to piece together a complete view of how customers interact with your brand.
- When mapping a customer journey, don't tiptoe around poor experiences and gaps in the journey. Addressing issues and crafting better communications and technological solutions around them are the only ways to move forward.

Think about the customer journey beyond email.

- It's easier to think about how the customer journey applies to email because it's such a linear communication path: first this email, then that one. Try to incorporate multichannel elements in your customer journey mapping, testing new channels based on where your audience spends the most time online.
- Which social channels are most successful for your brand? Mix up the types of messages that appear on social channels so that customers in various stages of the journey receive content that's relevant to them. Above all, always reply to individual customers' messages on social media. At no point in your customers' journeys do they wish to be ignored.

2015 Recommendations: Mobile

Join the mobile majority.

- Consider 2015 “last call” to get started with mobile. With 58% of marketers now having a dedicated mobile marketing team, you’re in the minority if you aren’t headed in this direction.
- If you’re part of the 23% of marketers who aren’t tracking mobile analytics (or the 8% who don’t know), take steps to remedy that now. Mobile analytics will help you pinpoint exactly how mobile fits into your overall customer journey.

Integrate mobile and reap the benefits.

- All signs point to mobile integration being a boon for business. Marketers, B2B and B2C alike, report higher levels of effectiveness in other marketing channels and technologies when mobile is integrated.
- Marketers who have integrated mobile into their overall strategy are twice as likely to have dedicated digital teams by channel and have larger teams overall.

Educate your team — and the larger organization — on the importance of mobile.

- The first step in integrating mobile with your overall marketing strategy is to help your team and larger marketing department understand the huge impact on business. Start by sharing this report, or pull out a few key statistics to share in your next presentation. Once others see the data behind mobile integration, it becomes easier to get things moving.
- Figure out who your internal mobile experts are — or turn to a trusted vendor — to assess any barriers that may exist between mobile and your other channels. Bring your mobile team together with your social, email, and web team to take a holistic look at how your customers currently interact via mobile as part of the journey with your brand.

Explore loyalty and location-based campaigns.

- Mobile loyalty campaigns have the highest very effective/effective rating at 86%. They’re also the most common type of mobile campaign, with 37% of mobile marketers using them. And if you don’t yet have a loyalty program, developing one with a mobile-first mindset is a smart way to start.
- Don’t wait another few years to test out location-based content. With 67% of marketers planning to substantially or somewhat increase spending in this category in 2015, you risk falling behind if you don’t explore it.
- The consumer appetite for location-based content is there — you just need to discover how your business can respectfully and relevantly use customer locations to create a more cohesive journey in the real world as much as in the online world.

2015 Recommendations: Social

Test new social channels.

- Do your research on channels that might resonate best with your unique audience. For example, Tagged was ranked the most effective channel in our survey — even above big-name outlets like Facebook. Engage in some social listening to see if topics relevant to your brand or competitors are taking place on these lesser-known social networks.
- Consider using the chart on p. 28 as a guide to test new channels, keeping these marketer ratings and, of course, your audience in mind.

Get serious about social.

- Invest the resources — both headcount and budget — to support social as a viable channel, because it is. With 66% of marketers rating it as core to their business, it's no longer the fringe marketing outlet it once was.
- As further proof, the jump in marketers who view social media marketing as a critical enabler for products or services (from 25% in 2014 to 64% in 2015) tells you that it's working. If you're not yet seeing significant business results from social, start small. What's the one channel where your social audience is most responsive? Direct more resources to growing that space instead of spreading your efforts too thin.

Adopt a round-the-clock strategy.

- New data shows that consumers are most engaged on social media during weekends — which is when brands post the least frequently. Designate on-call social managers for every hour of the day, because customers interact on their own terms when it comes to social channels.
- True, you can schedule messages on Facebook and Twitter in advance — but you shouldn't schedule ahead with no one available to reply. Messages posted to social channels should incite customer questions and engagement, and few things can frustrate customers more than a question that goes ignored, especially when the brand posted just moments earlier.
- Test what works for your own social audience. We recommend doing an internal benchmark study: track time of day and day of week social engagement for at least three months, then see when engagement was highest and lowest. Focus your social efforts around these findings.

A group of business professionals in a meeting. A man on the left is leaning over a table, looking at a laptop. A woman on the right is smiling and looking at the laptop. Another person is visible in the background, also looking at the laptop. The scene is set in a modern office environment with warm lighting and bokeh effects in the background.

Conclusion

Digital marketing as we know it is fundamentally changing. Marketers and industry watchers previously viewed digital marketing as simply one category within marketing — one tool of many in a marketer's kit. Increasingly, perception is shifting to a more holistic view in which all marketing is part of the digital world.

No matter which tactics, channels, and strategies you adopt in 2015, remember that every touchpoint is an opportunity to improve and influence the digital customer journey.

Executive Summaries

By Country and Region

Executive Summary: Australia

These statistics reflect the strategies, challenges, and priorities most important to marketers in Australia.

Most Pressing Business Challenges

- #1

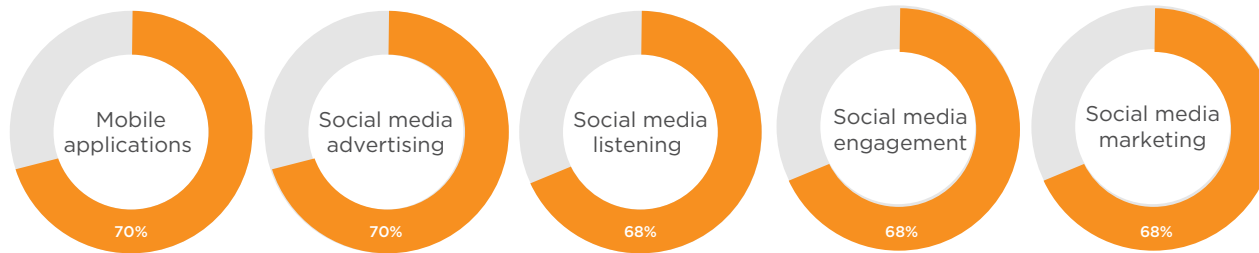
Budgetary constraints
- #2

New business development
- #3

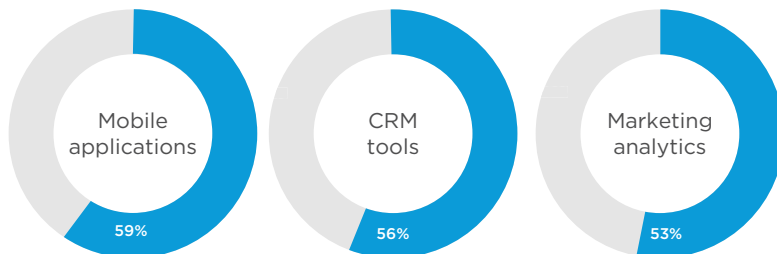
Building deep customer relationships

85% of marketers plan to increase or maintain their spend in 2015.
31% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=143*
64% of marketers believe email marketing is core to their business	
41% always/often use responsive design to build emails	
40% report conversion rate as the most important email marketing metric	
27% don't know what device subscribers are using to read emails	

MOBILE	N=125*
69% have integrated mobile marketing into the overall marketing strategy	
56% of marketers believe mobile marketing is core to their business	
54% have a dedicated mobile marketing team (a 33% increase from 2014)	
40% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=149*
57% believe social is a critical enabler of their products and services	
55% of marketers believe social media marketing is core to their business	
52% have a dedicated social media team	
40% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: Brazil

These statistics reflect the strategies, challenges, and priorities most important to marketers in Brazil.

Most Pressing Business Challenges

- #1

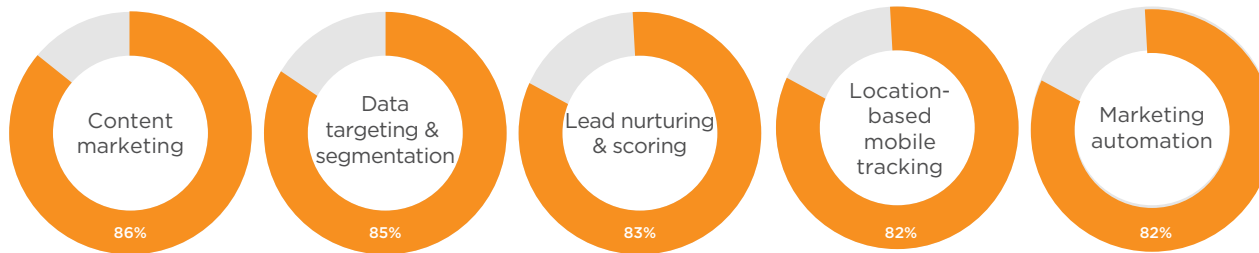
 Integration of marketing tools/systems
- #2

 New business development
- #3

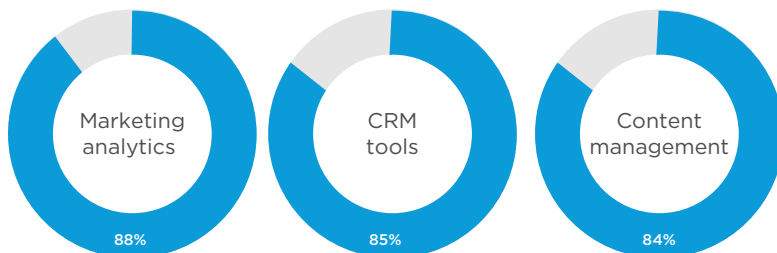
 Shifting consumer demographics

96% of marketers plan to increase or maintain their spend in 2015.
40% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=354*
92% of marketers believe email marketing is core to their business	
68% always/often use responsive design to build emails (a 31% increase from 2014)	
49% of subscribers read emails on a mobile device more than half of the time	
44% report conversion rate as the most important email marketing metric	

MOBILE	N=323*
93% of marketers believe mobile marketing is core to their business	
53% have integrated mobile marketing into the overall marketing strategy	
44% have a dedicated mobile marketing team (a 12% increase from 2014)	
37% rate lead generation and conversion rate as the most important mobile metrics	

SOCIAL	N=384*
88% of marketers believe social media marketing is core to their business	
62% believe social is a critical enabler of their products and services	
53% have a dedicated social media team (a 21% increase from 2014)	
38% rate audience engagement as the most important social media marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: Canada

These statistics reflect the strategies, challenges, and priorities most important to marketers in Canada.

Most Pressing Business Challenges

- #1

Keeping pace with the competitors
- #2

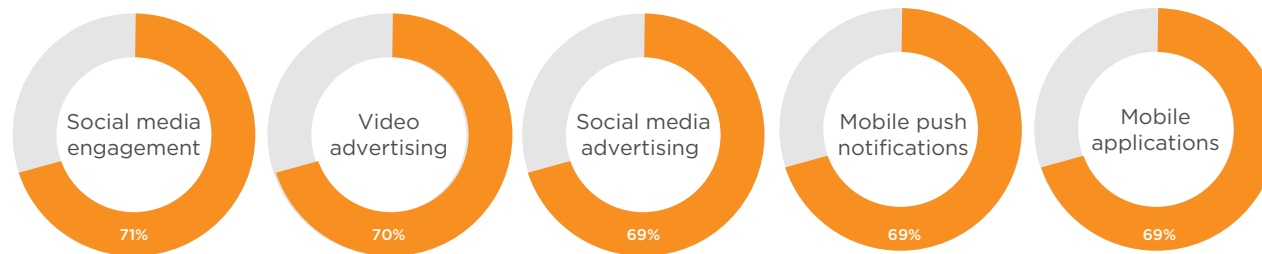
New business development
- #3

Customer acquisition (audience and/or list growth)

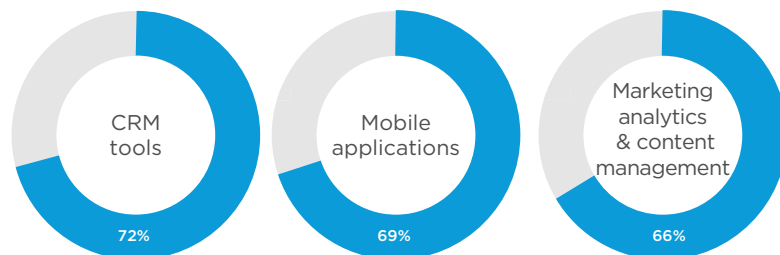
96% of marketers plan to increase or maintain their spend in 2015.

34% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=173*
69% of marketers believe email marketing is core to their business	
47% always/often use responsive design to build emails	
41% report click-through rate as the most important email marketing metric	
18% don't know what device subscribers are using to read emails	

MOBILE	N=156*
72% have integrated mobile marketing into the overall marketing strategy	
62% of marketers believe mobile marketing is core to their business	
59% have a dedicated mobile marketing team	
45% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=188*
68% of marketers believe social media marketing is core to their business	
63% have a dedicated social media team	
52% believe social is a critical enabler of their products and services	
52% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: France

These statistics reflect the strategies, challenges, and priorities most important to marketers in France.

Most Pressing Business Challenges

- #1

Remaining up to date with current marketing technology
- #2

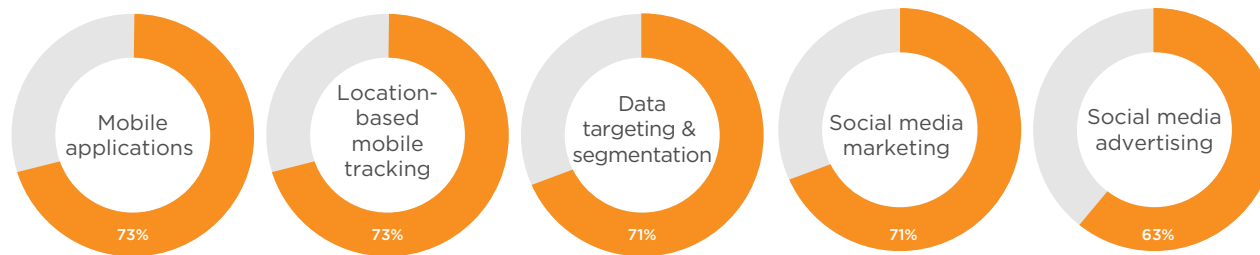
Integration of marketing
- #3

Quality of leads

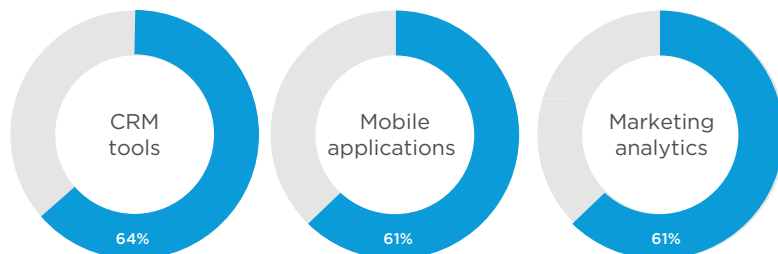
90% of marketers plan to increase or maintain their spend in 2015.

28% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=179*
80% of marketers believe email marketing is core to their business	
49% report click-through rate and conversion rate as the most important email metrics	
32% don't know what device subscribers are using to read emails	
31% always/often use responsive design to build emails	

MOBILE	N=127*
67% of marketers believe mobile marketing is core to their business	
58% rate mobile website or app traffic as the most important mobile marketing metric	
55% have integrated mobile marketing into the overall marketing strategy	
34% have a dedicated mobile marketing team	

SOCIAL	N=172*
60% of marketers believe social media marketing is core to their business	
50% believe social is a critical enabler of their products and services	
43% have a dedicated social media team	
42% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: Germany

These statistics reflect the strategies, challenges, and priorities most important to marketers in Germany.

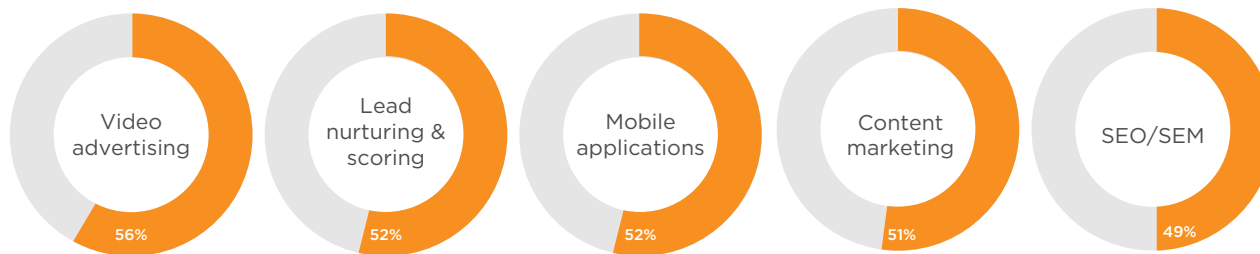
Most Pressing Business Challenges

- #1** Quality of leads
- #2** Remaining up-to-date with current marketing technology
- #3** Quantifying marketing's return on investment

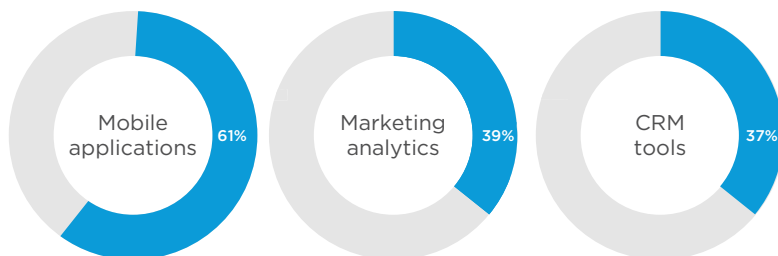
90% of marketers plan to increase or maintain their spend in 2015.

15% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=133*
65% of marketers believe email marketing is core to their business	
52% rarely/never use responsive design to build emails	
38% report click-through rate as the most important email marketing metric	
36% don't know what device subscribers are using to read emails	

MOBILE	N=90*
44% have integrated mobile marketing into the overall marketing strategy	
39% rate revenue from mobile device transactions as the most important metric	
34% of marketers believe mobile marketing is core to their business	
28% have a dedicated mobile marketing team	

SOCIAL	N=91*
47% believe social is a critical enabler of their products and services	
42% of marketers believe social media marketing is core to their business	
32% say visitor frequency rate and audience growth rate are the most important metrics	
31% have a dedicated social media team	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: Japan

These statistics reflect the strategies, challenges, and priorities most important to marketers in Japan.

Most Pressing Business Challenges

- #1

Quality of leads
- #2

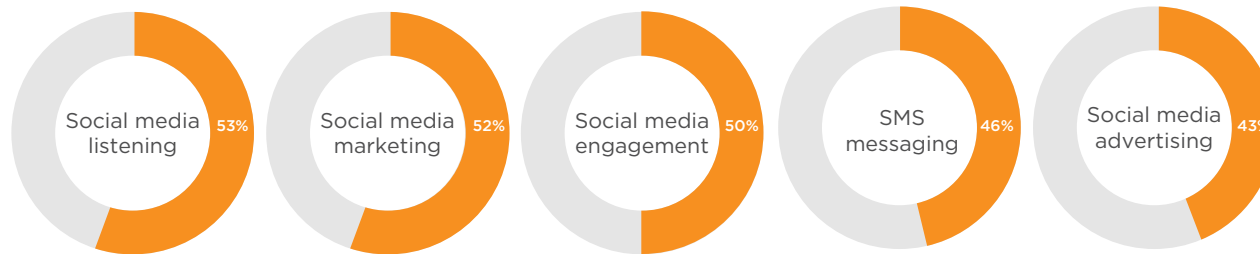
Quantifying marketing's return on investment
- #3

Remaining up to date with current marketing technology

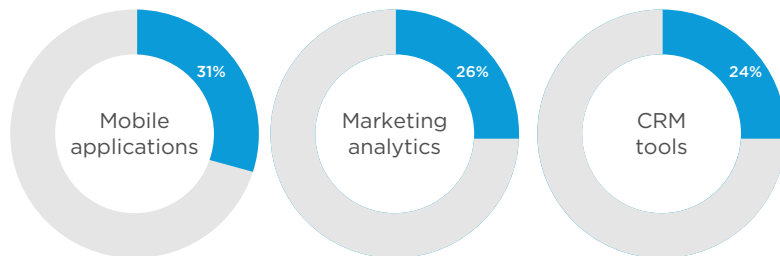
81% of marketers plan to increase or maintain their spend in 2015.

20% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=78*
63% report click-to-open rate as the most important email marketing metric	
37% don't know what device subscribers are using to read emails	
31% of marketers believe email marketing is core to their business	
17% always/often use responsive design to build emails	

MOBILE	N=57*
46% rate overall brand awareness/preference as the most important mobile metric	
40% of marketers believe mobile marketing is core to their business	
40% have integrated mobile marketing into the overall marketing strategy	
25% have a dedicated mobile marketing team (a 13% increase from 2014)	

SOCIAL	N=46*
46% rate overall brand awareness/preference as the most important social media metric	
45% believe social is a critical enabler of their products and services	
43% of marketers believe social media marketing is core to their business	
33% have a dedicated social media team	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: The Nordics

These statistics reflect the strategies, challenges, and priorities most important to marketers in the Nordics.

Most Pressing Business Challenges

- #1

New business development
- #2

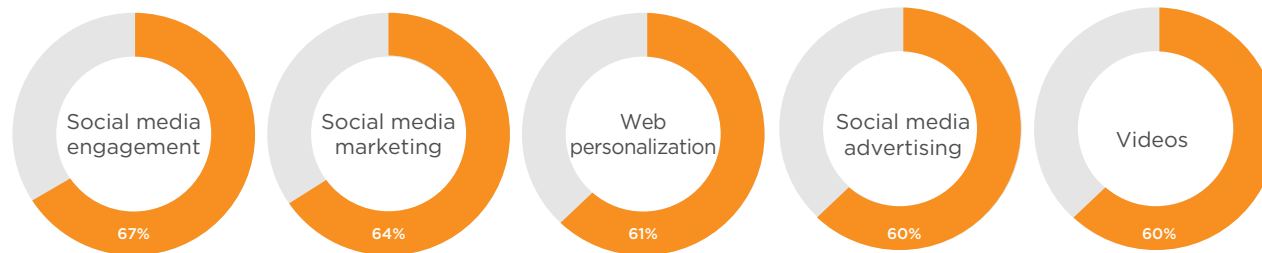
Customer acquisition
- #3

Demand and lead generation

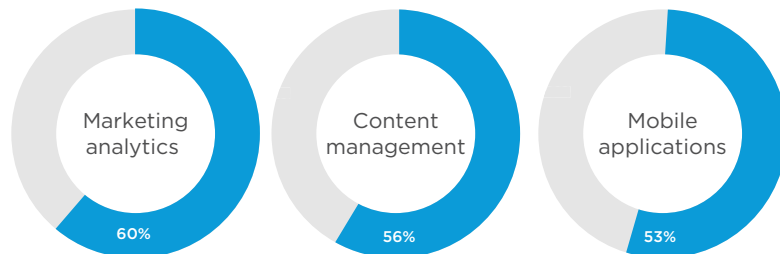
94% of marketers plan to increase or maintain their spend in 2015.

28% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=79*
52% report click-to-open rate as the most important email marketing metric	
51% of marketers believe email marketing is core to their business	
48% always/often use responsive design to design emails	
34% don't know what device subscribers are using to read emails	

MOBILE	N=55*
49% have integrated mobile marketing into the overall marketing strategy	
45% rate mobile website or app traffic as the most important mobile marketing metric	
44% of marketers believe mobile marketing is core to their business	
18% have a dedicated mobile marketing team	

SOCIAL	N=90*
65% believe social is a critical enabler of their products and services	
51% of marketers believe social media marketing is core to their business	
48% say visitor frequency rate and audience engagement are the most important metrics	
43% have a dedicated social media team	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: United Kingdom

These statistics reflect the strategies, challenges, and priorities most important to marketers in the United Kingdom.

Most Pressing Business Challenges

- #1

New business development
- #2

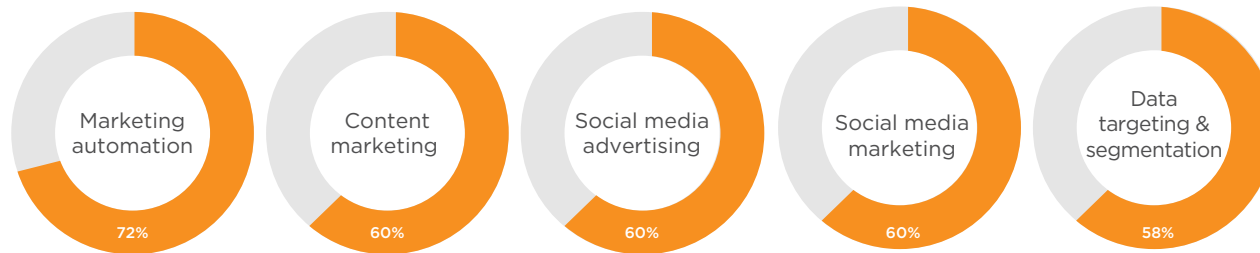
Quality of leads
- #3

Customer acquisition (audience and/or list growth)

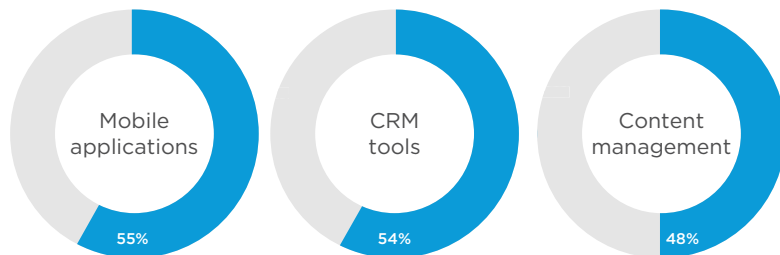
88% of marketers plan to increase or maintain their spend in 2015.

24% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=171*
74% of marketers believe email marketing is core to their business	
49% report conversion rate as the most important email marketing metric	
42% always/often use responsive design to build emails	
30% don't know what device subscribers are using to read emails	

MOBILE	N=104*
46% of marketers believe mobile marketing is core to their business	
45% have integrated mobile marketing into the overall marketing strategy	
43% say conversion rate is the most important mobile marketing metric	
17% have a dedicated mobile marketing team	

SOCIAL	N=153*
79% of marketers use Twitter compared to 74% on Facebook to engage customers	
54% believe social is a critical enabler of their products and services	
52% of marketers believe social media marketing is core to their business	
42% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: United States

These statistics reflect the strategies, challenges, and priorities most important to marketers in the United States.

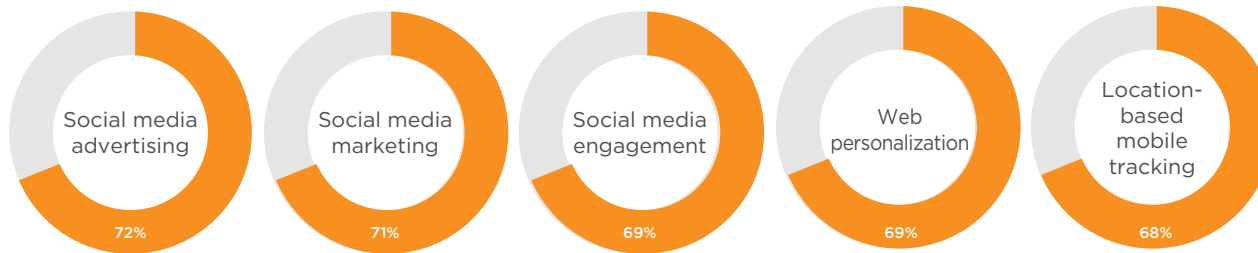
Most Pressing Business Challenges

- #1** New business development
- #2** Using existing data to drive more relevant messages
- #3** Customer acquisition (audience and/or list growth)

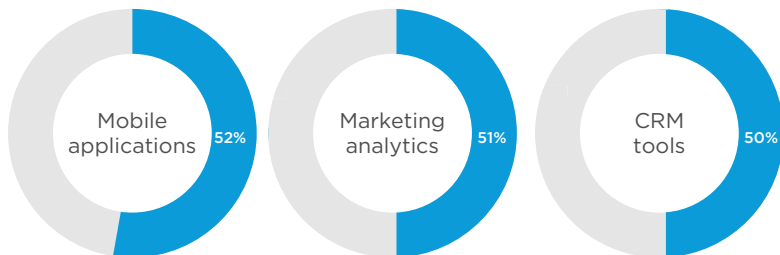
80% of marketers plan to increase or maintain their spend in 2015.

45% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Technologies Most Critical to Creating a Cohesive Customer Journey



EMAIL	N=1087*
73% of marketers believe email marketing is core to their business	
57% report click-through rate as the most important email marketing metric	
53% always/often use responsive design to build emails (was 18% in 2014)	
23% don't know what device subscribers are using to read emails	

MOBILE	N=1269*
78% have integrated mobile marketing into the overall marketing strategy	
77% of marketers believe mobile marketing is core to their business	
73% have a dedicated mobile marketing team (a 38% increase from 2014)	
46% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=1713*
78% have a dedicated social media team (was 57% in 2014)	
67% of marketers believe social media marketing is core to their business	
70% believe social is a critical enabler of their products and services	
45% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summaries

By Business Type

Executive Summary: B2B

These statistics reflect the strategies, challenges, and priorities most important to B2B marketers.

Most Pressing Business Challenges

- #1

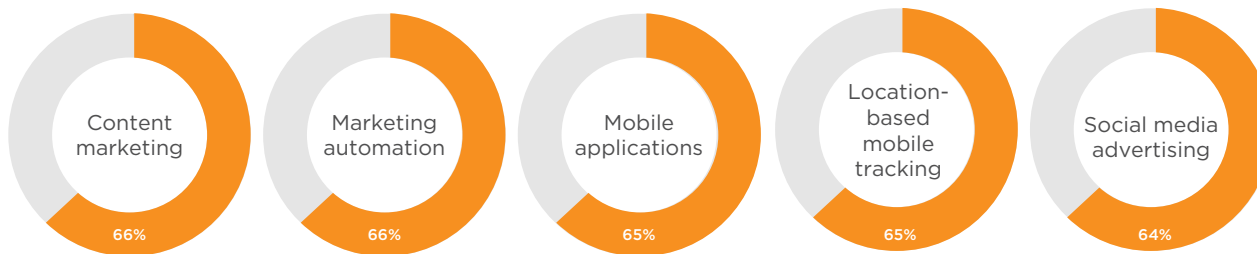
New business development
- #2

Quality of leads
- #3

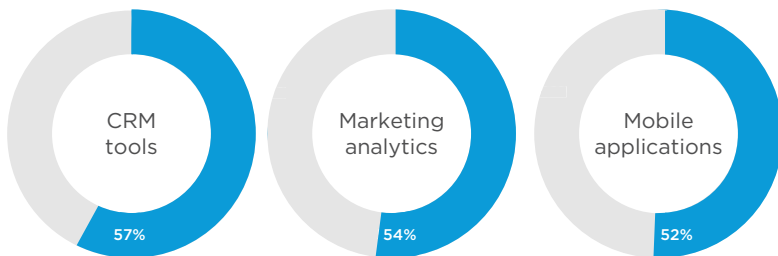
Demand and lead generation

84% of marketers plan to increase or maintain their spend in 2015.
34% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Most Critical Technologies to Creating a Cohesive Customer Journey



EMAIL	N=1259*
73% of marketers believe email marketing is core to their business	
48% report click-through rate as the most important email marketing metric	
48% always/often use responsive design to build email campaigns	
27% don't know what device subscribers are using to read emails	

MOBILE	N=868*
64% believe mobile marketing is core to their business	
53% have integrated mobile marketing into the overall marketing strategy	
43% have a dedicated mobile marketing team	
40% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=1288*
56% believe social media marketing is core to their business	
55% believe social is a critical enabler of their products and services	
51% have a dedicated social media team	
40% rate social media traffic and audience engagement as the most important metrics	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Executive Summary: B2C

These statistics reflect the strategies, challenges, and priorities most important to B2C marketers.

Most Pressing Business Challenges

- #1

Remaining up to date with current marketing technology
- #2

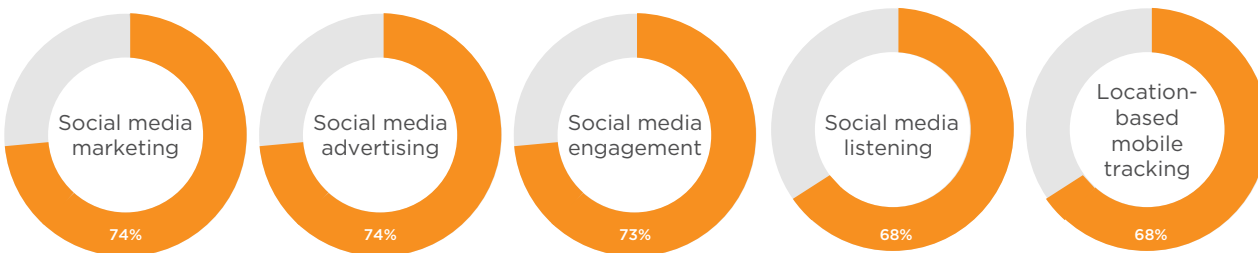
New business development
- #3

Customer acquisition

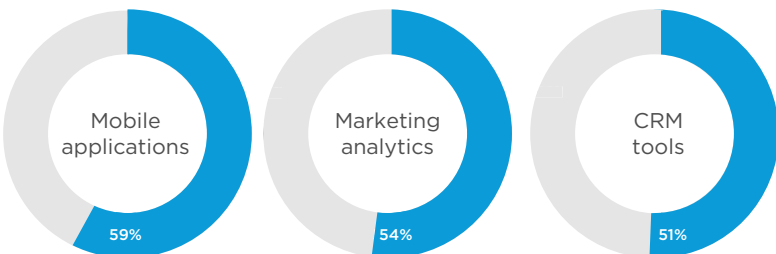
84% of marketers plan to increase or maintain their spend in 2015.

42% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending



Most Critical Technologies to Creating a Cohesive Customer Journey



EMAIL	N=1138*
73% of marketers believe email marketing is core to their business	
49% always/often use responsive design to build email campaigns	
46% report click-through rate and conversion rate as the most important email metrics	
20% of marketers don't know what device subscribers are using to read emails	

MOBILE	N=1438*
77% have integrated mobile marketing into the overall marketing strategy	
76% believe mobile marketing is core to their business	
68% have a dedicated mobile marketing team	
45% rate mobile website or app traffic as the most important mobile marketing metric	

SOCIAL	N=1698*
76% have a dedicated social media team	
74% believe social media marketing is core to their business	
70% believe social is a critical enabler of their products and services	
43% rate social media traffic as the most important social marketing metric	

* Percentages represent data from the base of respondents who indicated that they use this channel.

Survey Methodology and Demographics

Survey Methodology and Demographics

The *2015 State of Marketing* survey was conducted online from October 28, 2014, to November 25, 2014. The survey was sent to full-time marketers in Salesforce Marketing Cloud's locations around the world. A total of 5,053 marketers completed the survey, representing an 82% participation rate from those who started it. The survey took 17 minutes, 26 seconds, on average, to complete. Due to rounding, not all percentage totals in this report equal 100%.

The following charts display the demographics of marketers who completed the survey.

Region

North America (US, Canada)	64%
South America (Brazil)	9%
APAC (Australia, Japan)	10%
EMEA (UK, Nordics, Germany, France)	17%

Country

Australia	4.99%
Brazil	8.51%
Canada	4.95%
France	5.01%
Germany	4.97%
Japan	4.97%
Nordics (Finland, Norway, Sweden, Denmark)	2.26%
United Kingdom	4.95%
United States	59.41%



Survey Methodology and Demographics

Company Type

Business-to-Business (B2B)	44%
Business-to-Consumer (B2C)	56%

Company Size

Small: 1-200 Employees	39%
Mid-Sized: 201-2,500 Employees	50%
Enterprise: 2,500+ Employees	11%

Industry

Technology & Manufacturing	15%
Insurance	9%
Advertising & Marketing Agency	9%
Professional Services	7%
Life Sciences	7%
Financial Services	6%
Education & Non-Profit	5%
Construction	5%
Telecommunications & Utilities	4%
Retail & E-Commerce	4%
Healthcare	4%
Media & Entertainment	3%
Consumer Packaged Goods (CPG)	3%
Travel & Hospitality	2%
Other	17%

Role

Owner or Equivalent	10%
Chief Marketing Officer	8%
Vice President	5%
Director or Equivalent	13%
Manager or Equivalent	28%
Self-Employed or Consultant	5%
Coordinator	7%
Analyst	6%
Developer	6%
Associate	4%
Designer	5%
Other	2%

Time in Role

Less than 1 Year	3%
1-2 Years	11%
3-5 Years	39%
6-10 Years	26%
11-15 Years	9%
More than 15 Years	12%



THE CUSTOMER SUCCESS PLATFORM