

salesforce

SEVENTH EDITION

State of Marketing

Insights and trends from over 8,200 global marketers engaging customers from anywhere



What You'll Find in This Report

For the seventh edition of our “State of Marketing” report, Salesforce Research surveyed over 8,200 marketing leaders worldwide to discover:

- Which shifts have occurred in marketing strategies, priorities, and challenges during recent economic and social turbulence
- The current state and trajectory of marketing’s digital transformation
- Trends in marketing data management
- How collaboration is changing as many teams operate remotely

Data in this report is from a double-blind survey conducted from May 4 through June 3, 2021 that generated 8,227 responses from marketing managers, directors, VPs, and CMOs. Respondents include marketers from B2B, B2C, and B2B2C companies across North America, South America, Asia Pacific, Europe, the Middle East, and Africa.

All respondents are third-party panelists (not limited to Salesforce customers). For further survey demographics, see page 31.

Due to rounding, not all percentage totals in this report equal 100%. All comparison calculations are made from total numbers (not rounded numbers).



Over 8,200 marketing leaders surveyed worldwide



What You'll Find in This Report

Breakdown of Marketing Performance Levels

Throughout this report, we classify survey respondents across the following tiers of marketing performance.

15%
UNDERPERFORMERS
Moderately or less satisfied with their overall marketing performance and the outcomes of their marketing investment

14%
HIGH PERFORMERS
Completely satisfied with their overall marketing performance and the outcomes of their marketing investment



72%
MODERATE PERFORMERS
All other marketers



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Executive Summary

Optimistic about the future, marketers are blazing new trails as they prioritize innovation, digital transformation, and a work-from-anywhere future that constitutes anything but “back to normal.” To get there, they are embracing technology, data, and new measures of success.

01

Marketers Embrace Change with Optimism

Emerging from a time of great upheaval, marketers are focused on a future of innovation and real-time engagement. **Sixty-six percent of marketers expect revenue growth over the next 12 to 18 months.**

02

As Customers Go Digital, Marketing Steps Up

After years' worth of changes in customer behavior occurring over the course of months, marketers are accelerating their digital transformations. **Ninety percent of marketers say their digital engagement strategy has changed since the pandemic began.**

03

Collaboration Drives the Market-from-Anywhere Era

No longer tied to offices, a distributed workforce is reevaluating how they engage not only customers, but each other. **Seventy-five percent of marketers say the pandemic has permanently shifted how they collaborate and communicate at work.**

04

Marketing Is Spelled D-A-T-A

Data empowers marketers to deliver the trusted, personalized engagement customers expect, but managing it is only becoming more complex. **Marketers expect a 40% increase in the number of data sources they use between 2021 and 2022.**

05

Metrics and KPIs Continue to Evolve

As their work becomes more strategic and valuable for the business at large, marketers are reevaluating what successful marketing looks like. **Seventy percent of CMOs align their KPIs with their CEO's.**



01

Marketers Embrace Change with Optimism

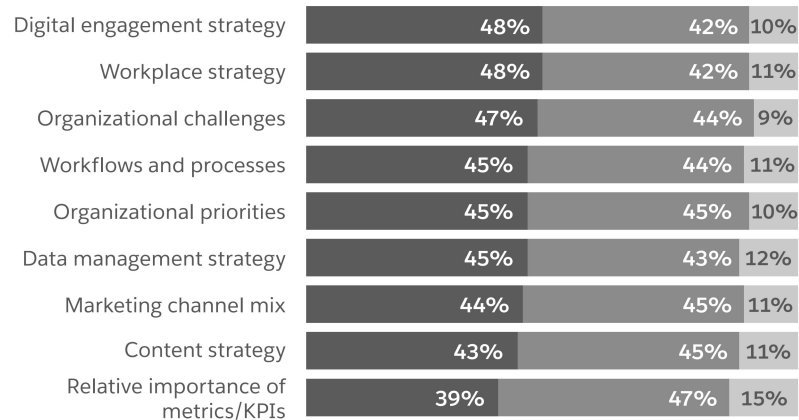
Marketers – as is true for businesses in general – are experiencing change at unprecedented scale and speed. Rocked by a pandemic and all of its effects on customer expectations and behaviors, marketers are rethinking everything from the channels they use to how they define success.

“The speed of change over the last year has propelled us towards never-before-seen levels of marketing innovation. We tried new things, learned hard lessons, got back up and kept on going. It’s amazing to think of how far we’ve come with the digital experiences we can now deliver, built with a relentless focus on the success of our care giving customers and partners.”

TARIQ HASSAN
CMO, PETCO

As the World Transformed, so Did Marketing

Extent to Which Marketers Say the Following Have Changed Since Before the Pandemic



- Completely changed
- Somewhat changed
- No change



01

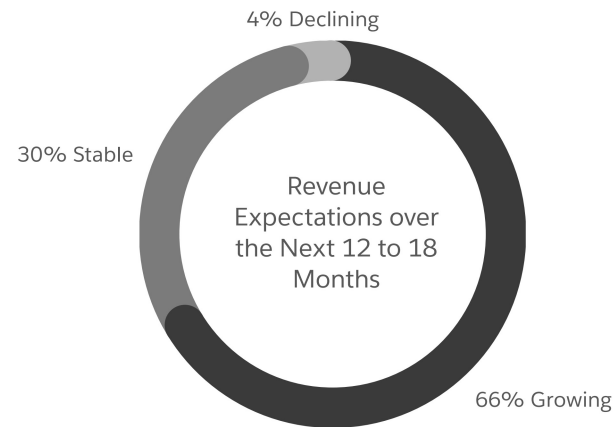
Marketers Embrace Change with Optimism

Far from feeling defeated by more than a year of crisis, marketers are entering the next phase of their work with renewed optimism and purpose. In fact, 66% of marketers expect revenue growth at their companies over the next 12 to 18 months. What's more, marketers see themselves as having a bigger role in driving that growth; **77% of marketers feel their work provides greater value now than it did a year ago.**

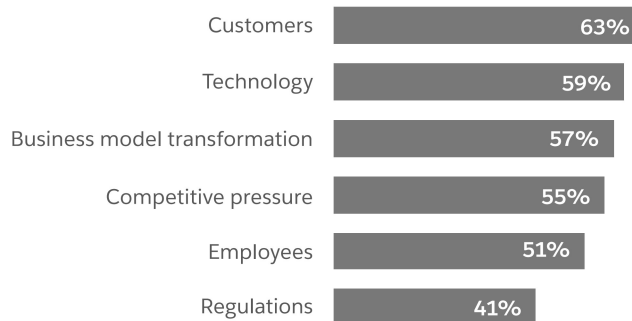
Optimism and purpose do not translate into complacency, however, and this is particularly true during times of change. **Eighty-eight percent of CMOs say their marketing must transform in order to be competitive.**

61% of high performers say employees are impacting marketing strategy, versus 47% of underperformers.

Marketers Are Optimistic as Their Strategies Shift



Marketers Who Say the Following Factors Impact Their Strategy



01

Marketers Embrace Change with Optimism

Even as marketers enter a new era of customer engagement, some tried-and-true undertakings are just as important as ever. Innovating for rapidly changing customers – and interacting with them in real time – remain at the same time marketers' most pressing priorities and challenges.

As marketers maintain their focus on innovation, they're also particularly concerned with improving ROI and attribution models to understand what's working and what's not. In a new work-from-anywhere reality in which teams are distributed and the role of the office has changed, collaboration is also top of mind, as are the organizational structures and processes that were designed for a different time.

Marketers Face a Mix of Familiar and New Priorities and Challenges

Marketers' Top Priorities

- 1 **Innovating**
- 2 **Engaging with customers in real time**
- 3 **Creating a cohesive customer journey across channels and devices**
- 4 **Improving marketing ROI/attribution**
- 5 **Improving collaboration**

Marketers' Top Challenges

- 1 **Engaging with customers in real time**
- 2 **Innovating**
- 3 **Creating a cohesive customer journey across channels and devices**
- 4 **Collaboration**
- 5 **Insufficient organizational structures and processes**

■ Carryover from top 5 in 2020 ■ New to top 5 for 2021



01

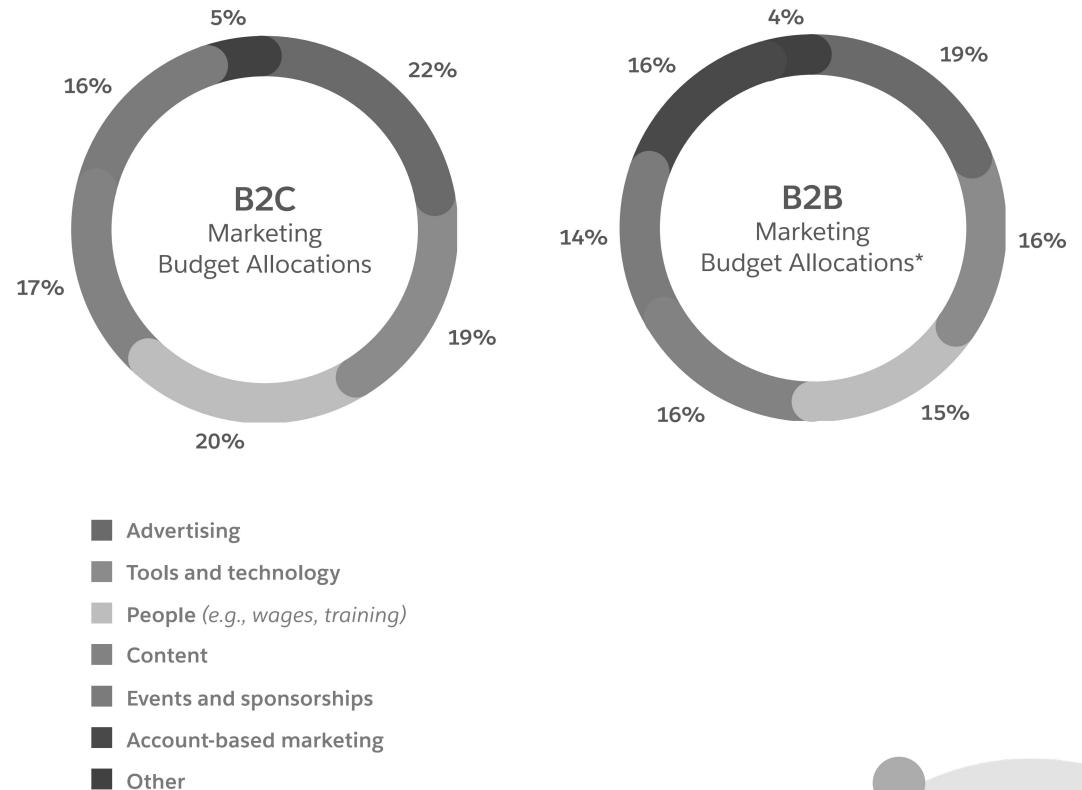
Marketers Embrace Change with Optimism

As always, marketers are challenged to allocate limited resources as customer expectations soar and their behaviors evolve. Advertising, technology, content, and events all consume similar portions of marketing budgets, along with the costs associated with wages and training. For B2B marketers, the added imperative of account-based marketing (ABM) programs adds another line item.

“The ability to adjust to rapid changes in market conditions is key in 2021. This is both a year of transition and a year of opportunity. Marketers need to double down on critical investment and opportunity areas to execute Plan A, while also having Plan B and Plan C ready to go. Prioritizing things like technology, content, and skilling people for this digital-first era will help marketers stay ahead, no matter what the future holds.”

GUILLERMO PLASENCIA
CMO & CO-FOUNDER, JOINMYTRIP.COM

Marketing Budgets Cover an Array of Objectives

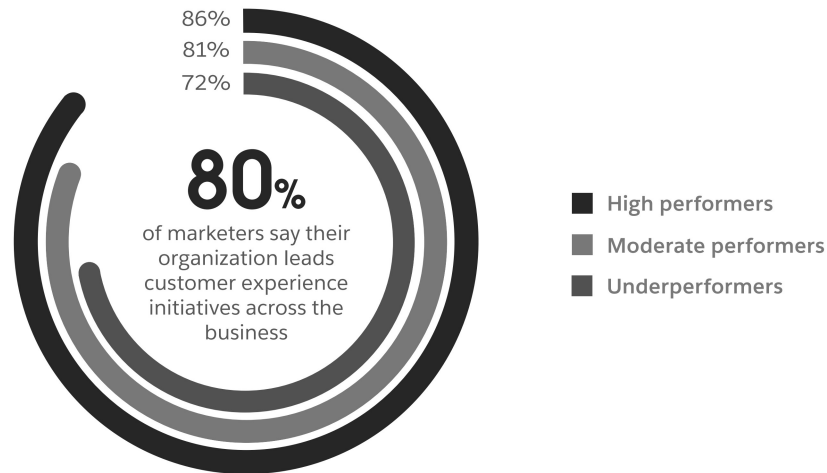


Base: CMOs and VPs of marketing.
* Includes: B2B and B2B2C marketers.



As Customers Go Digital, Marketing Steps Up

Amid Change, Customer Experience Still Reigns Supreme



Change may be afoot for marketers, but at least one tenet remains the same: customer experience as the North Star.

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

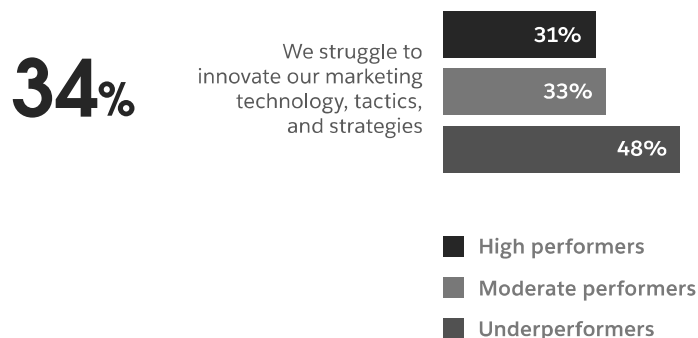
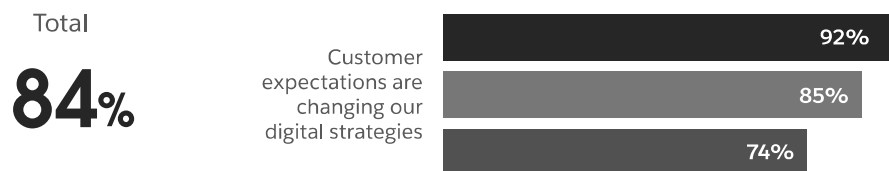
Marketers are maintaining both their focus and leadership when it comes to driving customer experience across the customer journey. **Eighty percent of marketers say customer experience is the key competitive differentiator.**

Yet as customers shifted the channels they frequent and the experiences they favor, meeting customer expectations – let alone understanding them – became an even more challenging endeavor. **Seventy-two percent of marketers say meeting customer expectations is more difficult than a year ago.**

As Customers Go Digital, Marketing Steps Up

Innovation Is Essential as Customer Expectations Evolve

Marketers Who Agree with the Following



Central to changing customer expectations is the swift and substantial migration to digital channels that will persist for the long term. **Sixty-one percent of customers expect to spend more time online after the pandemic than they did before.***

These increasingly digital customers expect the businesses they buy from to keep up. **Eighty-eight percent of customers expect companies to accelerate digital initiatives due to COVID-19.*** But expectations for innovative experiences extend beyond technology itself. **Sixty-nine percent of customers say companies should offer new ways to get products and services due to COVID-19.***

The vast majority of marketers acknowledge the impact of changing customer expectations on their digital strategies.

* Salesforce State of the Connected Customer Report, October 2020.

02

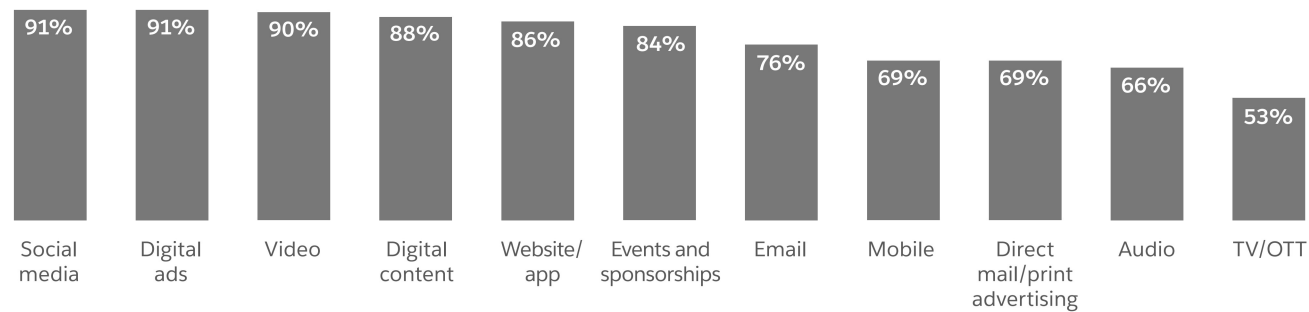
As Customers Go Digital, Marketing Steps Up

Digital channels have solidified their central role in marketers' toolkits; social media, digital ads, and video round out the three most common means of reaching customers.

Even those digital channels that may have been classified as emerging in recent years are seeing mass adoption. Mobile messaging, for instance, is used by 69% of marketers, and nearly two-thirds of organizations use audio media like podcasts and streaming ads.

Marketers Have Embraced Digital Channels En Masse

Marketing Organizations That Use the Following Channels



As Customers Go Digital, Marketing Steps Up

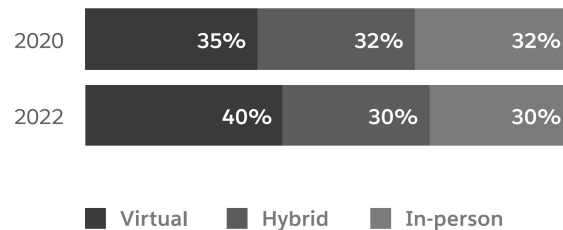
Video Is the Star Channel of 2021

Channels with the Biggest Increases in Value over the Past Year

- 1 Video
- 2 Social media
- 3 Digital ads
- 4 Digital content
- 5 Website/app

Virtual and Hybrid Event Formats Are Here to Stay

Estimated Share of Event Formats



With customers largely hunkered down at home with their devices, it makes sense that digital channels have become even more prized than before. **Ninety percent of marketers say their digital engagement strategy has changed since before the pandemic, and 89% say their marketing channel mix has changed.**

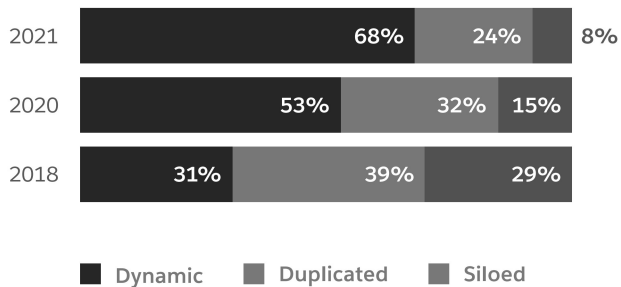
Video, from YouTube to TikTok to Twitch, has been especially lauded by marketers over the past year, with social media and digital ads such as display following closely behind. Even what could arguably be called the most analog channel of all – events and sponsorships – is going digital, with marketers expecting the trend toward virtual and hybrid event formats to carry into 2022.



As Customers Go Digital, Marketing Steps Up

Cross-Channel Coordination Is Getting More Sophisticated

Marketers Who Describe Their Cross-Channel Coordination as Follows



The use and value of digital channels, themselves, is only part of the story. Just as critical is the extent to which marketers can leverage those channels together to deliver the right message at the right time. **Seventy-eight percent of marketers say they engage customers in real time across one or more marketing channels.**

Over two-thirds of marketers now describe their cross-channel coordination as dynamic – meaning that messages evolve in a hyperpersonalized manner based on customer actions. That compares to fewer than one-third of marketers who reported dynamic cross-channel coordination in 2018.

84% of marketers say they adapt marketing strategy and tactics based on customer interactions.

02

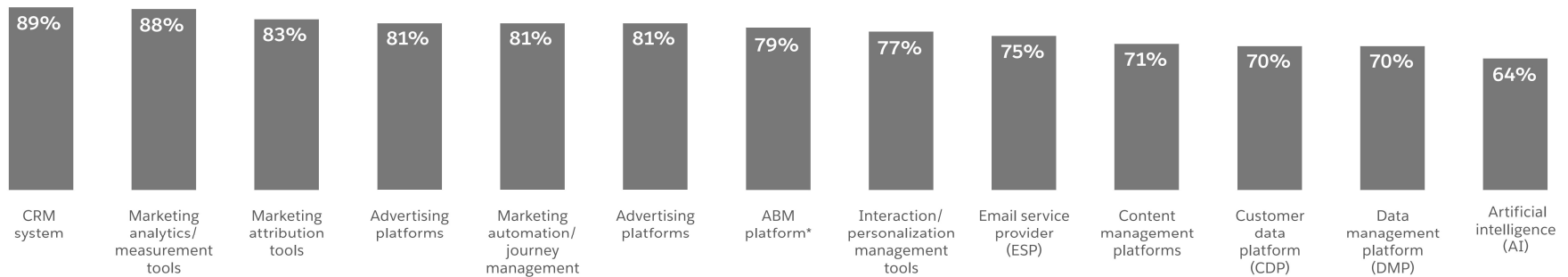
As Customers Go Digital, Marketing Steps Up

Although demand for marketers' creativity isn't going anywhere soon, the increasingly digital nature of customer engagement means that the most well-rounded marketers are also technologists. **Eighty-three percent of marketers say their ability to meet customer expectations depends on their digital capabilities, and 83% say their work will be more technology-driven after the pandemic than before.**

Customer relationship management (CRM) systems are the most prevalent technology for marketers, but they are joined by a cadre of other tools and platforms that help organize and make sense of data, automate processes, and measure results, among other capabilities.

As Digital Customer Engagement Grows, so Does the Marketer's Toolkit

Marketing Organizations That Use the Following Technologies



* Base: B2B and B2B2C marketers.



SPOTLIGHT: Artificial Intelligence

Marketers' embrace of artificial intelligence (AI) follows that of customers. **Sixty percent of customers are open to the use of AI to improve their experiences.***

Sixty percent of marketers have a fully defined AI strategy – up from 57% in 2020 – although the gap between high performers and their underperforming competition persists.

With AI being a newer technology, marketers are experimenting with different use cases, with increased emphasis on driving best actions, process automation, and personalization.



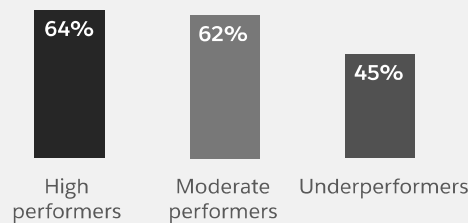
Marketing AI Use Cases Are Evolving

Top AI Use Cases Among Marketers**

	2020	2021
1	Personalized experiences in individual channels	Drive next best actions
2	Improved customer segmentation	Personalize the overall customer journey
3	Surface insights from data	Automate customer interactions
4	Drive next best actions	Personalize individual channel experiences
5	Automate customer interactions	Process automation

** Base: Marketers who report using AI.

Marketing Organizations with a Fully Defined AI Strategy



* Salesforce State of the Connected Customer Report, October 2020.

03

Collaboration Drives the Market-from-Anywhere Era

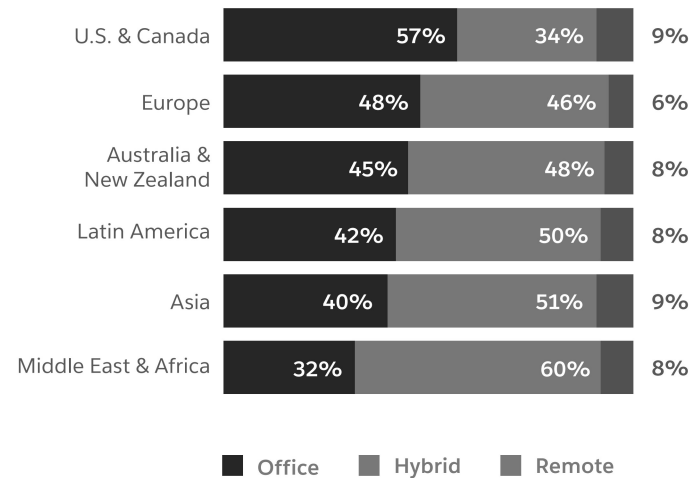
Marketing organizations made a striking realization during more than a year of varying shelter-in-place orders: Employees can work from anywhere.

82% of marketing organizations are adopting new policies around remote work.

Like many changes made over the course of 2020 and 2021, this shift to working from anywhere is not going away, although the extent to which it will stick varies by region. The majority of marketers in the U.S. and Canada, for example, expect to return to the office full time, yet over a third of them expect to work in a hybrid environment. That's in striking contrast to marketers in the Middle East and Africa where less than one-third expect to work in an office full time.

The Work-from-Anywhere Era Will Continue

Marketers Who Expect to Work in the Following Settings After the Pandemic



Explore country-level data in Tableau.



03

Collaboration Drives the Market-from-Anywhere Era

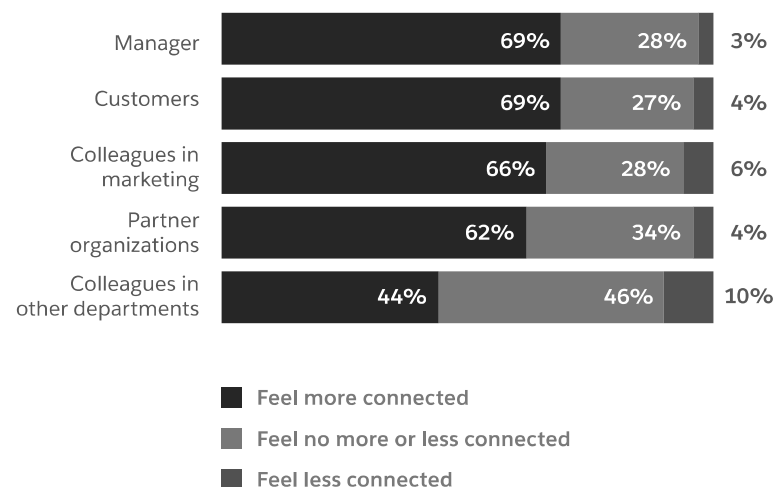
Despite the fact that many marketers have been physically apart, they don't necessarily feel disconnected from each other. In fact, the majority of marketers say they feel more connected to their managers, customers, marketing colleagues, and partners. **Seventy-five percent of marketers say the pandemic has permanently shifted how they collaborate and communicate at work.**

Of course, adjusting to a work-from-anywhere environment hasn't been without its challenges. **Sixty-nine percent of marketers say it's harder to collaborate now than before the pandemic.** But marketers are adapting, in no small part by reevaluating the tools they use to connect. **Seventy-eight percent of marketing organizations have adopted new work collaboration technology due to the pandemic.**

85% of marketers say they use video conferencing, and 82% say they use channel-based collaboration.

Though Physically Separate, Many Marketers Feel More Connected

Marketers' Feelings of Connectedness to the Following Parties Versus a Year Ago



03

Collaboration Drives the Market-from-Anywhere Era

Marketers are least likely to feel more connected to their colleagues in other departments, and the effects are apparent on customer experiences.

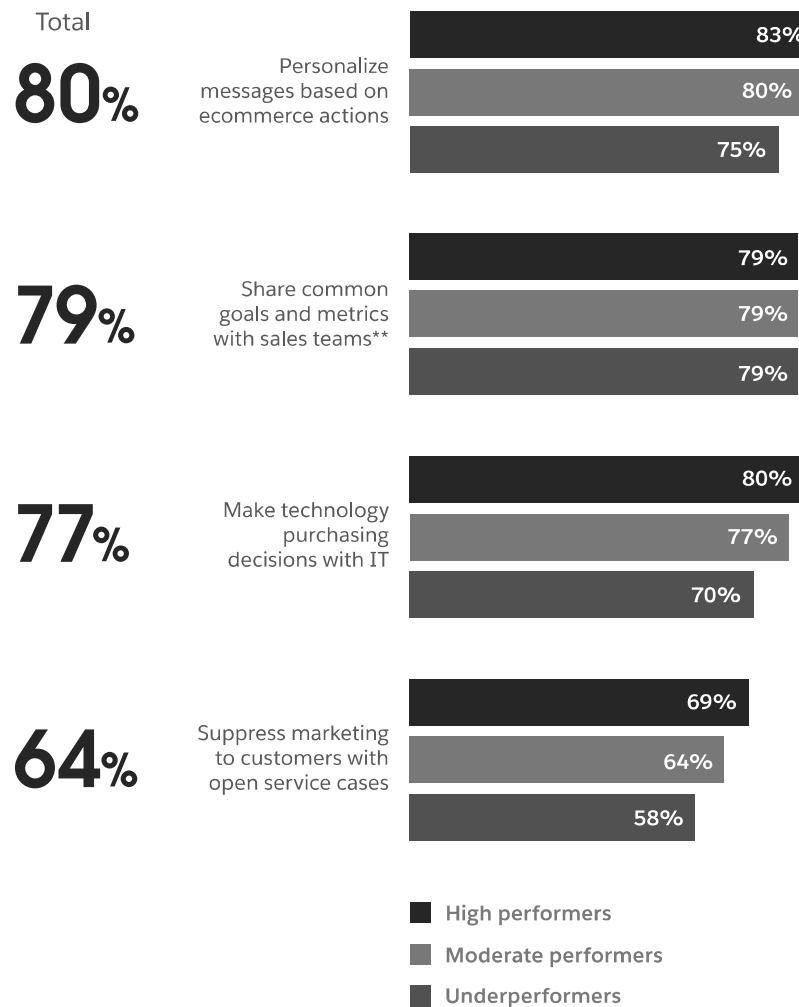
76% of customers expect consistent interactions across departments, but 54% say it generally seems like departments don't share information.*

Still, the vast majority of marketers say they share common goals and relevant customer data with their colleagues in sales, customer service, and ecommerce. Relationships between marketers and their counterparts in IT are also strong, with collaboration on analytics, personalization, and other technology decisions the norm.

* Salesforce State of the Connected Customer Report, October 2020.

Marketers Maintain Cross-Functional Connections Despite Being Physically Dispersed

Marketers' Feelings of Connectedness to the Following Parties Versus a Year Ago



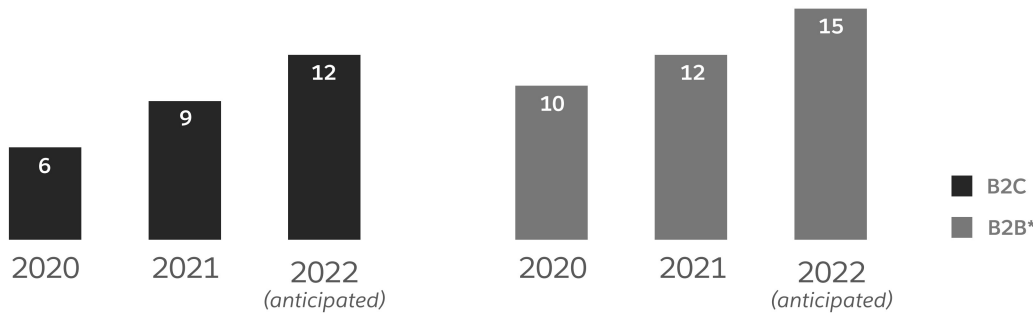
** Base: B2B and B2B2C marketers.



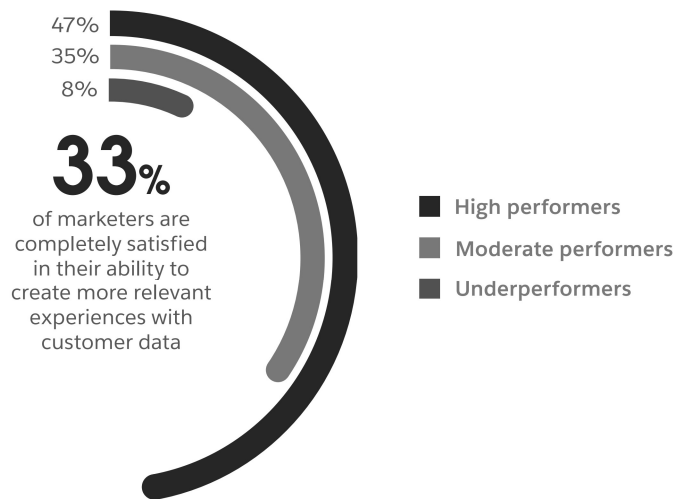
Marketing Is Spelled D-A-T-A

Customer Data Is Plentiful, But Using It Remains Tricky

Average Number of Data Sources Used



* Includes: B2B and B2B2C marketers.



Like humans need water, marketing needs data – and lots of it – to be effective.

78% of marketers say their customer engagement is data-driven.

Marketers across the board continue to forecast increases in the number of data sources they'll leverage over the coming years, with B2B marketers particularly bullish on the matter. High performers are far and away more likely than underperformers to be content with their ability to use customer data in creating more relevant customer experiences.

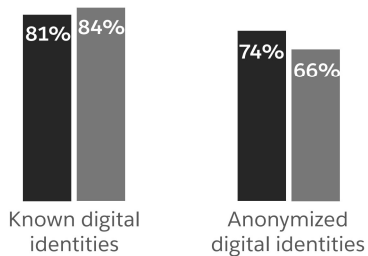
Marketing Is Spelled D-A-T-A

Customer Data Sources Shift in Popularity

Ranked Popularity of Customer Data Sources

2020	2021	Change in Ranking
Transactional data	Known digital identities	↑ 2
Declared interests/preferences	Transactional data	↓ 1
Known digital identities	Declared interests/preferences	↓ 1
Offline identities	Second-party data	↑ 2
Anonymized digital identities	Inferred interests/preferences	↑ 2
Second-party data	Offline identities	↓ 2
Inferred interests/preferences	Anonymized digital identities	↓ 2
Nontransactional data	Third-party data	↑ 1
Third-party data	Nontransactional data	↓ 1

Marketers Who Use the Following Customer Data Sources



■ U.S. and Canada ■ Europe, Middle East & Africa

Explore country-level data in Tableau.

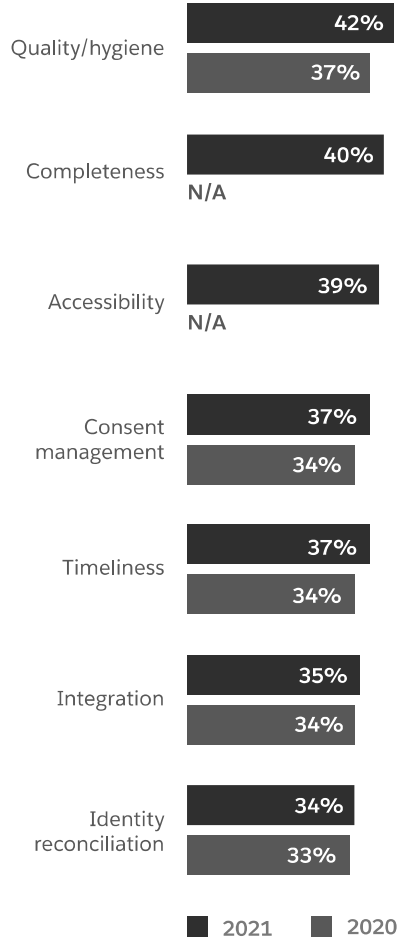
Marketers turn to an array of data sources to target individual customers and prospects across their unique journeys. As Apple, Google, and others restrict the use of third-party cookies, however, the relative popularity of data sources is shifting.

Known digital identities such as email addresses and social IDs are now the most popular customer data sources, followed by transactional data and declared interests and preferences. Offline identities such as postal addresses and anonymized digital identities like cookies and device IDs saw the biggest year-over-year drops in popularity.

Marketing Is Spelled D-A-T-A

Marketing Data Quality Still Leaves Much to Be Desired

Marketers Who Are Completely Satisfied with the Following Aspects of Their Customer Data



With so much emphasis being placed on customer data and its implications for marketing, it's reasonable to assume that organizations would pull out all the stops to ensure its overall quality. Unfortunately, marketers have made only marginal – if any – progress in improving data hygiene, timeliness, and integration, among other aspects.



Marketing Is Spelled D-A-T-A

Marketing Data Quality Still Leaves Much to Be Desired

Ranking of Customer Data Management Technology Use Cases

- 1 Customer insights
- 2 Consent management
- 3 Personalization
- 4 Identity reconciliation
- 5 Audience segmentation
- 6 Sharing customer information across business units
- 7 Remarketing
- 8 Marketing suppression

Base: Marketers using a customer data platform (CDP) or data management platform (DMP).

With so many types and sources of data at their fingertips, marketers are turning to technology to help them make sense of it all. **Seventy-eight percent of high performers say they use a customer data platform (CDP), versus 58% of underperformers.**

The ways in which marketers leverage data management technology are as varied as the fragmented landscape of solutions, ranging from CRM platforms to homegrown solutions. Gleaning customer insights and managing customer consent elections – a highly valuable proposition as privacy regulations evolve – are particularly popular. Less common use cases include remarketing – such as to customers who have abandoned their ecommerce carts – or marketing suppression – for example, for customers with an open customer service case who may be unhappy.

SPOTLIGHT: Privacy

More than three years after the European Union's General Data Protection Regulation (GDPR) took effect, marketers are slowly getting accustomed to the limitations placed on the use of customer data. This is thanks in no small part to a push to better understand and manage customer preferences. **Seventy-eight percent of marketers say they have a comprehensive view of all customer consent elections.**

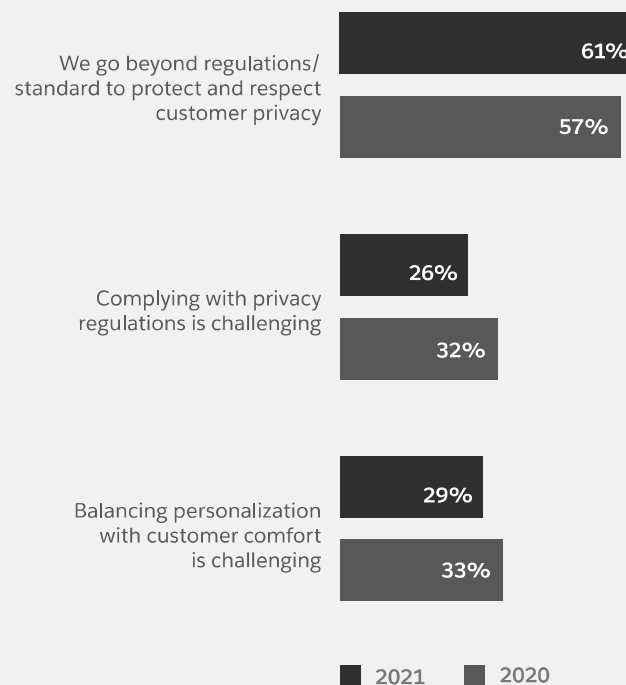
Compared to last year, marketers are increasingly exceeding the privacy standards and laws they're held accountable to. This trend coincides with an uptick in customers' anxiety on the issue.

61% of consumers feel like they've lost control over how their personal information is used (up from 46% in 2019).*

* Salesforce State of the Connected Customer Report, October 2020.

Privacy Is Becoming a Less Challenging Proposition for Marketers

Marketers Who Agree with the Following Statements



Metrics and KPIs Continue to Evolve

The definition of marketing success was already evolving prior to the events of 2020. But the radical shift in customer expectations and behaviors – not to mention business objectives – put that evolution into overdrive.

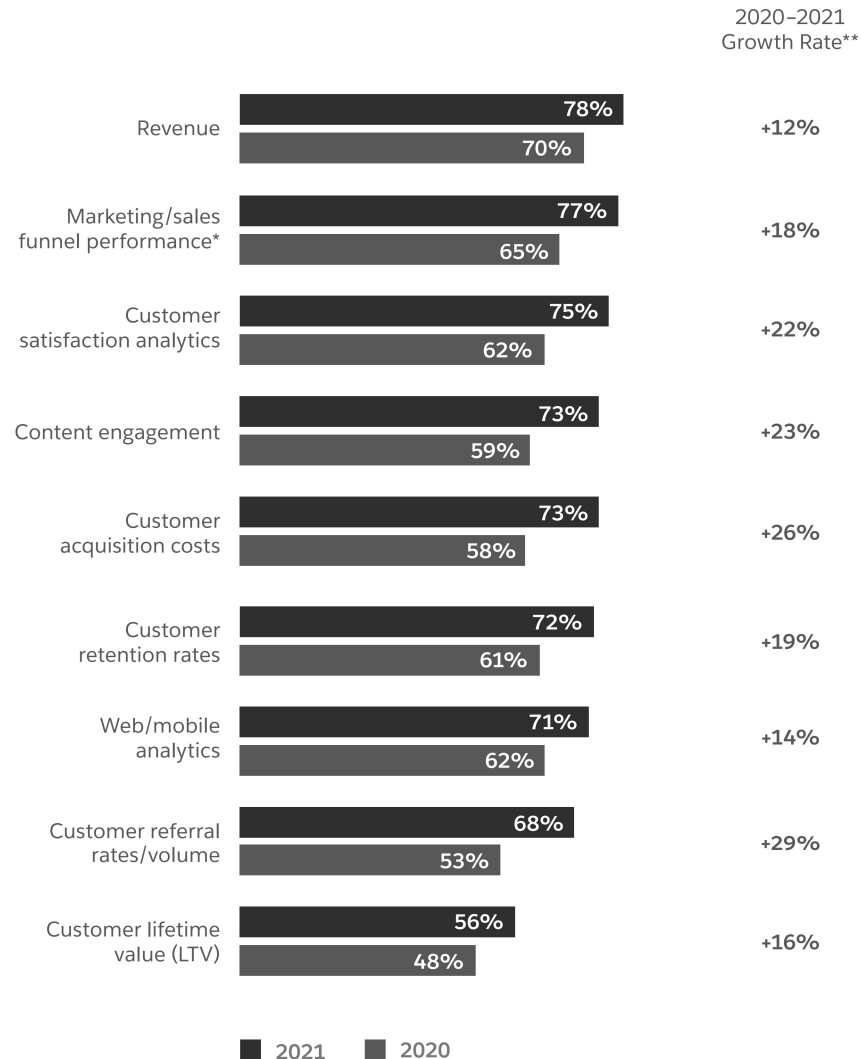
78% of marketing organizations have changed or reprioritized metrics due to the pandemic.

Revenue and funnel performance remain the foremost metrics for today's marketers. However, marketers have become more KPI-conscious across the board, with customer referral rates, customer acquisition costs, and content engagement seeing the biggest boosts in popularity.

Regardless of the specific metric, the increasingly strategic nature of marketing means that KPIs must be in line with those of company leadership. **Seventy percent of CMOs align their KPIs with their CEO's.**

Marketers Greatly Expanded Their KPIs over the Past Year

Marketing Organizations That Track the Following Metrics



* Base: B2B and B2B2C marketers.

** Growth rate = (2021-2020)/2020. Calculations are made from total numbers.



Metrics and KPIs Continue to Evolve

Customer satisfaction metrics such as Net Promoter Scores remain marketers' most helpful measure of success – outranking even revenue and marketing and sales funnel metrics. With customers and prospects shifting their digital engagement habits, content engagement metrics such as video views and virtual event attendances have also become particularly important. Customer lifetime value (LTV) rounds out the top five – a testament to the importance of keeping existing customers happy – despite being the least tracked metric overall.

Metrics are only valuable if action can be taken using them, and marketers have come a long way in their ability to both automate measurement and evaluate results live – enabling them to take action while a campaign is in flight.

Marketing Measurement Has Become a Real-Time Effort

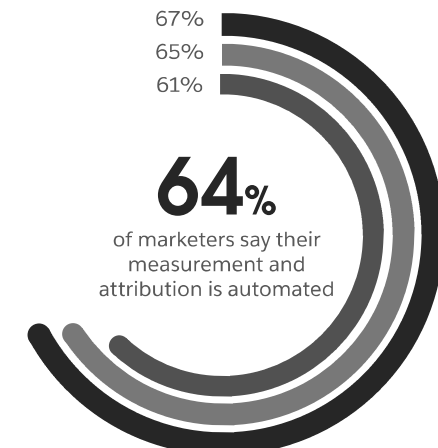
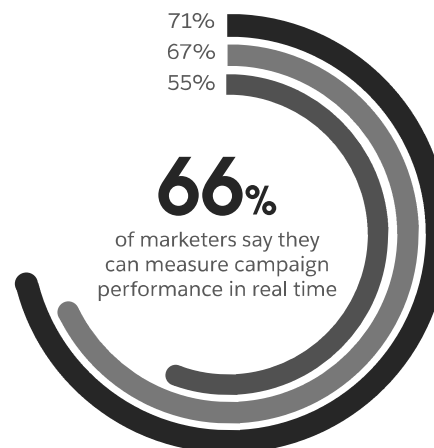
Most Valuable Marketing Metrics/KPIs*

- 1 **Customer satisfaction metrics**
- 2 **Revenue**
- 3 **Marketing/sales funnel****
- 4 **Content engagement**
- 5 **Customer lifetime value (LTV)**

* Base: Marketers who track the corresponding metric/KPI.

** Base: B2B and B2B2C marketers.

Marketers Who Agree with the Following Statements



■ High performers ■ Moderate performers ■ Underperformers



SPOTLIGHT: Account-Based Marketing

In last year's "State of Marketing" report, Salesforce found that account-based marketing (ABM) programs had become exceedingly popular among B2B marketers, despite being a relatively new phenomenon. Today, these programs command an average of 15% of B2B marketing budgets and are a cornerstone of overall marketing strategies.

Despite ABM's importance, B2B marketers see substantial room for improvement in their programs. Fewer than half of these marketers are completely satisfied with various aspects of their programs, ranging from the technology that powers them to their relationships with buying committees.

“Account-based marketing continues to deliver a sizable return on investment for our business. The investment is big – it's not easy to achieve the required level of alignment across marketing, sales, and service teams. But the experiences we deliver and the customer relationships we build in return make it more than worthwhile.”

HEATHER MALENSHEK
CMO, LAND O'LAKES, INC.

ABM Programs Are Still Maturing

Marketers Who Are Completely Satisfied with the Following Aspects of Their Account-Based Marketing Programs*



* Base VP+ B2B and B2B2C marketers with an ABM program.





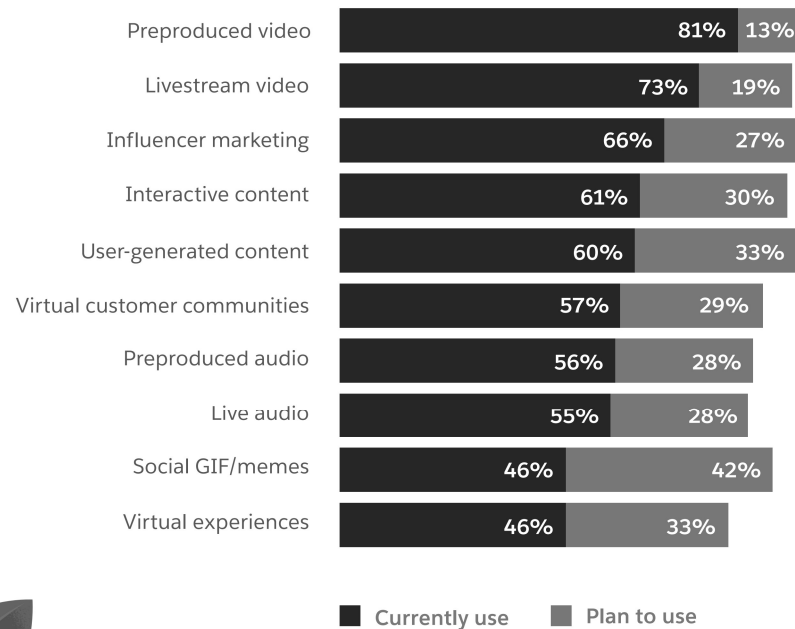
LOOK AHEAD: Digital Marketing Tactics

If digital customer engagement didn't define marketing prior to 2020, it does now. And like entrepreneurs who experimented with new business models during a time of extraordinary change, marketers are embracing new tactics to gain the attention of customers and prospects.

Video content – be it preproduced or livestreamed – is extraordinarily popular, with more than nine in 10 marketers at least planning its use. But even virtual experiences like wine tasting classes that gained in popularity during periods of lockdown are expected to surge in popularity even as societies emerge from lockdown.

Marketers Are Pushing the Boundaries of Digital Engagement

Marketers Using or Planning to Use the Following Tactics





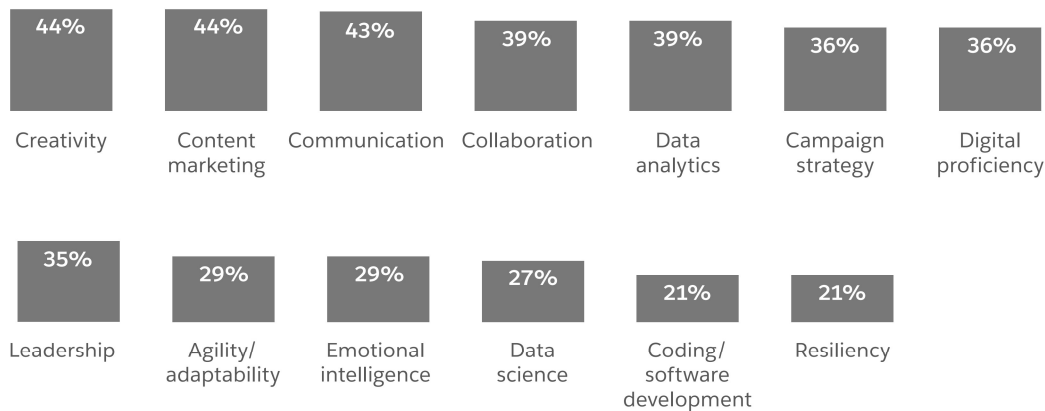
LOOK AHEAD: Marketing Skills and Training

Today, marketers need a unique and evolving collection of knowledge that constantly shifts between right- and left-brain mentalities. As such, marketers are questioning whether or not the training they get is truly setting them up for success. Only 44% of marketers rate the employee training they receive as excellent.

While creativity, content, and communication are the most common elements of marketing organizations' curriculums, they are provided by only a minority of employers. Even less common is training on interpersonal skills like emotional intelligence, the data science that underpins digital customer engagement and attribution, and perhaps the most important skill of all in 2021: resiliency.

As Marketing Evolves, Training Is Falling Behind

Marketers Who Say Their Employees Offer the Following Training



Survey Demographics



Survey Demographics

Industry

Architecture, engineering, and construction	3%
Automotive	7%
Communications	4%
Consumer goods	10%
Energy and utilities	5%
Financial services	7%
Government	1%
Healthcare	7%
Life sciences or biotechnology	3%
Manufacturing	10%
Media and entertainment	6%
Nonprofit	5%
Professional and business services	5%
Retail	14%
Supply chain and logistics	3%
Technology	5%
Travel and hospitality	6%
Other	<1%

Company Type

Business-to-business (B2B)	24%
Business-to-consumer (B2C)	43%
Business-to-business-to-consumer (B2B2C)	32%

Company Size

Small (21-100 employees)	31%
Medium (101-3,500 employees)	53%
Enterprise (3,501+ employees)	16%

Seniority

CMO	30%
Marketing SVP, EVP, or VP	8%
Marketing director	26%
Marketing manager	36%

Region

Europe, Middle East & Africa	36%
Asia Pacific	43%
U.S. & Canada	10%
Latin America	11%

Country

Argentina	2%
Australia	4%
Belgium	2%
Brazil	4%
Canada	3%
Chile	2%
France	3%
Germany	3%
Hong Kong	2%
India	4%
Indonesia	4%

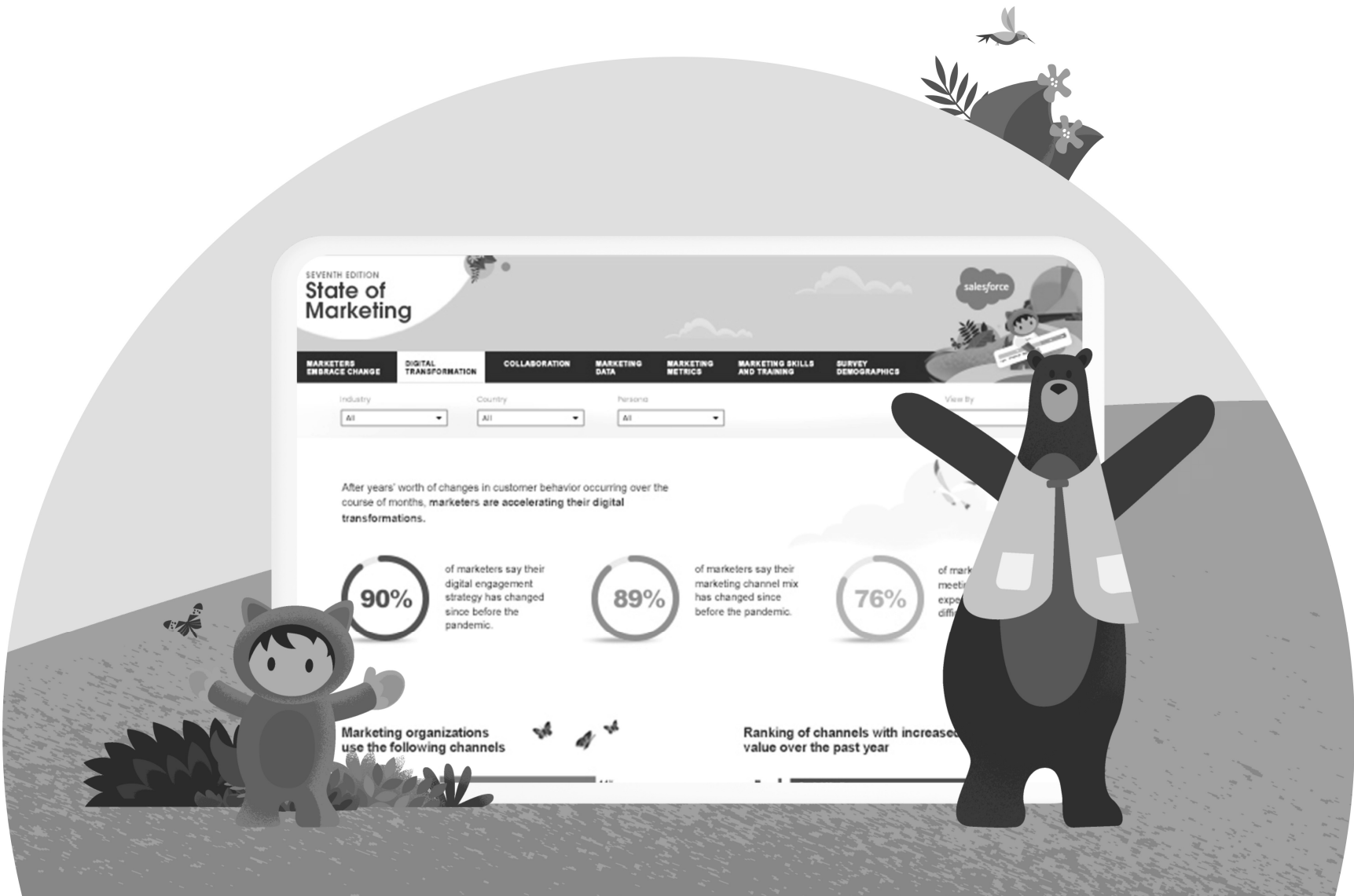
Ireland	2%
Israel	1%
Italy	4%
Japan	4%
Malaysia	4%
Mexico	4%
Netherlands	2%
New Zealand	1%
Nordics	2%
Philippines	4%
Poland	3%
Portugal	1%
Singapore	3%
South Africa	4%
South Korea	4%
Spain	3%
Switzerland	1%
Taiwan	4%
Thailand	4%
United Arab Emirates	2%
United Kingdom	3%
United States	6%
Vietnam	4%



Explore State of Marketing Data in Tableau!

Segment data by geography, industry, and more in our interactive Tableau dashboard.

EXPLORE THE DATA





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