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Quarterly Digital Intelligence Briefing: Digital Trends for 2013

in association with Adobe

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1. Foreword by Adobe

We are excited to launch this first Quarterly Digital Intelligence Briefing of 2013 which is aimed at shining a torch on some of the trends which will have the biggest impact on the way we work as marketers over the next 12 months and beyond. It is our first opportunity to compare with the same report a year earlier, and it's great to see that many of the trends which surfaced have increased in their significance to marketers, notably; content, conversion, mobile and social. Also to see the priority of personalization, highlighted for the first time.

As we begin a new year, we hope that this briefing will help to debunk some of the myths that continually surround marketing around our ability to measure and prove the value of everything we do. At Adobe we are trying to debunk these myths with our own campaign called 'Metrics Not Myths'. We are committed to helping marketing departments provide tangible evidence that they are responsible for driving sales and other types of conversion, as well as enabling companies to manage – and measure – consistent personalized experiences that span every online and offline channel.

As a technology supplier to marketers it's exciting to see over three quarters of survey respondents believe marketing will be more measurable in 2013, it's surprising to see less than a fifth think they already have the marketing technology to succeed.

We believe Adobe is uniquely positioned to help marketers in 2013; the Adobe advantage we give them is the unique ability to create engaging digital content in the Adobe® Creative Cloud™ and directly inject it into personalized campaigns which are optimized across every channel via the Adobe® Marketing Cloud.

Adobe® Marketing Cloud is a single service which gives our customers a complete set of analytics, social, advertising, targeting and web experience management solutions. It also provides a real-time dashboard that brings together everything you need to know about your marketing campaigns so you can get from data to insights to action.

It is clear that 2013 will be more challenging, exciting, and potentially rewarding than any before in digital marketing. On behalf of everyone at Adobe, we look forward to helping you meeting your business goals over the year ahead.

Adobe

#MetricsNotMyths

2.

Based on a survey of more than 700 digital professionals carried out in late 2012, this report looks at the trends which have now gathered enough momentum to shape the digital marketing and e-commerce landscape over the year ahead.

The single most significant trend is the continued emergence of content marketing as a standalone discipline. Content, in all its shapes and forms, is core to everything we do as marketers. There is now a widespread realization that optimization of all types of content, both on-site and off-site, and across a range of different formats and devices, is absolutely critical.

The rightful positioning of content at the center of the digital universe is illustrated by the tag cloud below.

A content-related buzz phrase set to gather more momentum during 2013 is ‘native advertising’ which is indicative of the blurring of boundaries between paid-for, earned and owned media¹. By producing great quality and immersive content, brands can market themselves without interrupting consumers with more explicit advertising.

Figure 1: What do you regard as the most important opportunity in 2013?



¹ <http://www.altimetergroup.com/research/reports/how-brands-must-combine-paid-owned-and-earned-media>

What about social media in 2013? This was a topic writ large in last year's report², and is still an on-going force to be reckoned with. However, social for many companies is now becoming 'business as usual' and another way of disseminating and amplifying content.

Like social, the mobile 'channel' (another oft-cited trend in recent years) can also be seen through the lens of content, with companies striving to present information and creative in a way which is compelling and effective across different devices.

In comparison to previous years, our survey suggests there is less emphasis on the sometimes nebulous topic of 'engagement' as companies focus on more tangible business outcomes which can make a difference to their bottom line.

What do you regard as the most important opportunity for 2013, and why are you focusing here?

"Attempting to optimize content for mobile and how this might dovetail with offline data to form a single view."

"Joining up online and offline data – or leveraging big data and the many sensors that collect data – we only utilize 5% of what we collect."

"Getting some sense out of the digital nonsense. It all LOOKS robust, but there's little meaning in all the clicks and visits and so on. Digital is just part of the mix, but the digital industry thinks it's holy."

"Multichannel marketing, as they have previously heavily relied on separate disconnected channels, which have not provided real value to their customers and therefore have not been used by their target audience."

"Social media, but very little measurable activity has actually been done due to confusion of tools and methods, leading to upper management lack of interest and reduction in expenditure."

"The most important opportunity lies in optimizing digital channels through analysis, strategy and creative development. Being able to reach customers in their environment requires continual optimization, which includes bringing new channels in the mix and removing those that don't perform."

Survey respondents

² <http://econsultancy.com/reports/fourth-quarterly-digital-intelligence-briefing/>

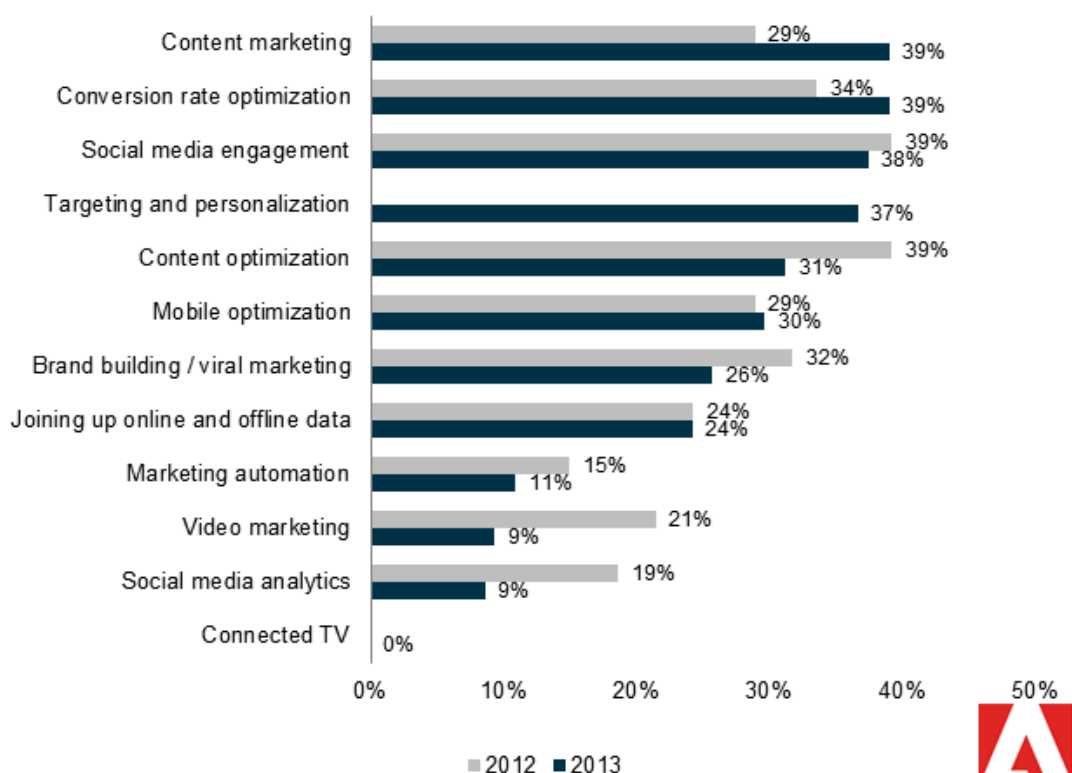
3. Capitalizing on engagement: increasing conversion from earned and owned media

The chart below shows the top priorities for in-house marketers in 2013, with the equivalent figures for 2012 also included. The emergence of *content marketing* as an important discipline in its own right is again clear to see, with a significant jump in the proportion of respondents who point to this as a priority for 2013 (up from 29% to 39%). The other notable year-on-year increase is for *conversion rate optimization* which has gone up from 34% to 39%. More companies have come to realize that even small uplifts in conversion rates brought about by improvements in processes and technology can translate into significant financial gains.

Targeting and personalization (37%) was a new option added to the survey this year, and this addition is vindicated by its position among the top priorities. *Content optimization* does not feature as prominently this year, though the ground it has lost may be attributable to the inclusion of *targeting and personalization*.

Areas less likely to be a top priority this year include *marketing automation*, *video marketing* and *social media analytics*. Again, this may be partly attributable to cannibalization due to the inclusion of an additional option. These areas may also have become more embedded within some organizations, making them less of an obvious focal point for the year ahead.

Figure 2: Which three digital-related areas are the top priorities for your organization in 2013?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

While *social media analytics* as a focus is (worryingly) not on the radar as a priority for many companies, *social media engagement* has maintained its position near the top of the leader board.

Even the most hard-charging CFO will grant that there's value to customer engagement, both in its broadest sense and specifically in the context of social media.

Engagement equates to a strong brand tie, leading to a higher lifetime value, product loyalty and customer advocacy. But there is no standard definition or metric for engagement, nor do most organizations fully understand the migration from engagement to revenue.

Together, the top three priorities for 2013 tell the story of how companies are aiming to build emotional ties that contribute to the bottom line. It begins with using content to build brand and generate inbound leads, increasing social media effectiveness to stay engaged with customers or prospects, and increasing conversion rates at key points in the process.

The challenge is to understand what's happening within the dynamic ecosystem of content and social and being able to make tactical changes to increase conversion and revenue.

This is a job for big data! Well, for some.

Every social media practitioner has encountered some of the same issues, related to the nature of the medium itself;

- There's too much data, especially if it's to be analyzed in real-time, when it is presumably most useful.
- It's hard to separate the wheat from the chaff, as so many social references are incidental or impossible to easily parse as positive, negative, neutral or meaningful at all.
- Correlating social trends with other data is a challenge that's part technical (at most organizations) and part human, as too few companies have the people in place to ask the right questions and test correlative versus causal relationships.

To some degree, content marketing can present similar obstacles to exact measurement and precise action. Knowing that prospects who download particular content are more likely to be hot leads is a start, but often over-credits some unlikely buyers while relegating good leads to the "just send them the newsletter" pile.

Advanced analytics, aka big data, offers promise in making sense of this complexity. The key is in the use of multiple data sources. This allows the analyst to bring a spectrum of data to bear on a question. One example would be aligning past purchase data with web analytics information to find the connection between conversion and content consumption.

Of course, big data has its own challenges. It's not cheap, and nor are the people who can make best use of the technology. For many organizations, there is also fundamental work in aligning disparate data sources before advanced analysis can begin.

For smaller companies, a good way to approach the question of a big data investment might be to ask whether there are important questions that can't be answered with the techniques that are currently available. If the answer is 'yes' then a big data program might be the next step.

4. Great content, spread through social channels and consumed anywhere

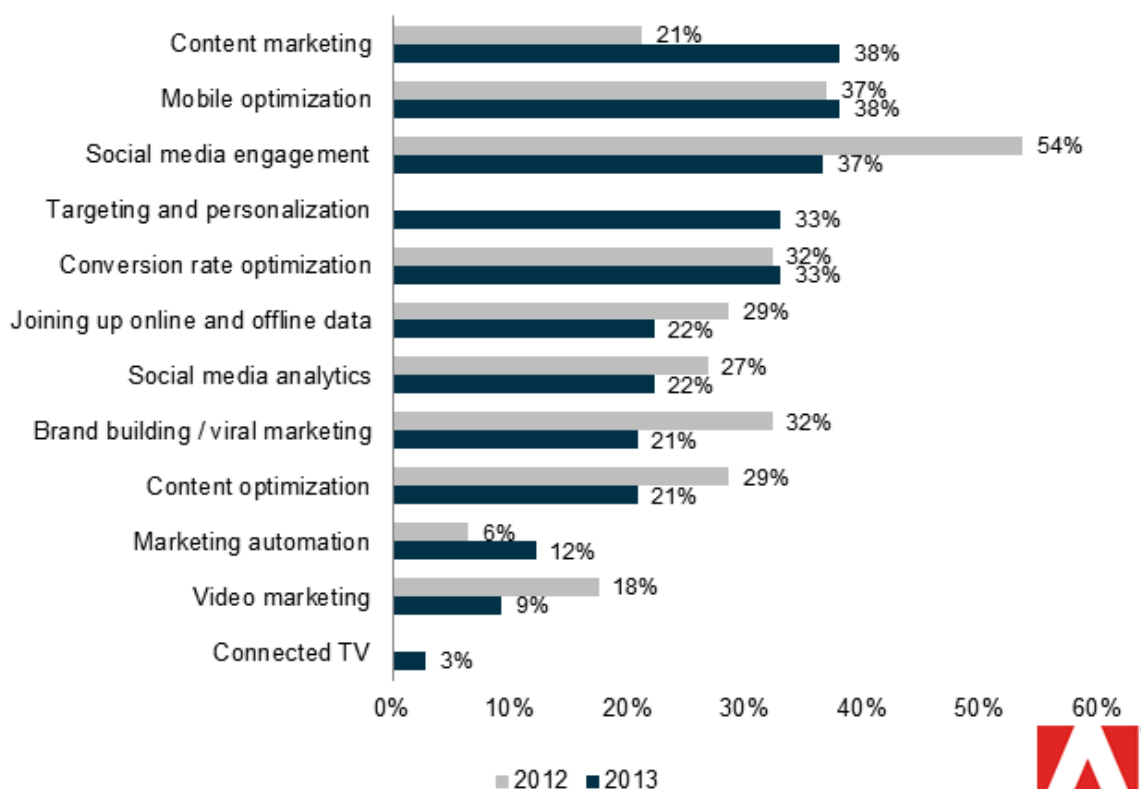
Figure 3 shows the pecking order of digital marketing priorities from the supply-side perspective, with *content marketing* again emerging as a key focus area with a jump to 38% from only 21% a year ago.

Agency respondents are more likely than their in-house counterparts to perceive *mobile optimization* as a top priority, with this option second in the list below compared to sixth place in Figure 2.

The chart also shows a large drop for *social media engagement* which is not apparent for client-side respondents. Just over a third (37%) of agencies report this to be a top priority for their clients, down from 54% last year. While social media was top of mind for marketers in 2012, agencies no longer see this as the shiny new but unproven toy that they were raving about 12 months ago.

Agencies

Figure 3: Which three digital-related areas are the top priorities for your clients in 2013?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

The social media ‘channel’ is continuing to move from the confines of the marketing department to wider usage across the organization, for example as part of customer service initiatives or product development and innovation.

As we enter 2013, at the enterprise level, social media programs are less likely to be driven by social media and community managers running them as a side activity in isolation. Organizations are gradually moving from tactical adoption to operational integration, with the C-suite having a more active role in formalizing strategies and harnessing it more effectively by opening up more channels for interaction.

Although a larger proportion of client-side respondents expect their marketing activity to be more measurable in 2013 (84% compared to 75% in 2012), it’s worrying that both client-side and agency respondents report that social media analytics are relatively low down the pecking order. Having an analytical baseline can give organizations the confidence to continue exploring the role of social media and justify further investment.

What do you regard as the most important opportunity for 2013, and why are you focusing here?

“The most important opportunity is content as this pervades all the digital media that we are using to reach our audiences.”

“Content marketing: it’s in the realm of ‘marketing without marketing’, building soft power and social gravity for a brand through shared values and interests.”

“Content optimization as behavioral CRO [conversion rate optimization]. To be able to learn about your casual and non-casual visitor and to tailor site content to their needs, and to have that bucketed as part of a CRO/MVT process is something that several of my clients are salivating over. If done correctly it allows for targeted messaging with proven statistical relevance, that has a direct connection to ROI.”

Survey respondents

While content marketing has emerged as the top priority for marketers next year, they focus too much on creation and neglect the importance of content optimization. Many struggle with the challenges associated with the planning, delivery and management of content. To ensure that their endeavors are successful, marketers need to create content which is:

- **Relevant, shareable and reusable.** Coca-Cola’s 2020 advertising strategy puts content at its core and uses the phrase “liquid and linked” to describe their content marketing plans.³ Content needs to be not only shareable, “contagious” (either by being educational, entertaining or provoking conversation), but also aligned to an organization’s business objectives, otherwise the impact on the bottom line will be negligible.

Most often, companies choose to create content with a specific purpose or campaign in mind, adopting a “blast and forget” approach. Content can often be repurposed and careful planning plays a significant role in maximizing efficiencies and content shelf life. For example, Coca-Cola applies a 70/20/10 investment rule to content creation: 70% is low-risk, core content relevant to their brand, 20% is spun-off from what has already worked within the 70% by optimizing and innovating, and the remaining 10% is high-risk, experimental content that can become tomorrow’s 70% or 20%.

- **Adaptive.** Around 90% of media consumption occurs in front of a screen and multi-device interactions have become the norm, with no single device at the center of users’ attention. Brands need to adapt their content processes and workflows to match this multi-tasking and multi-screen behavior and publish to multiple channels in an effective way.

Condé Nast was one of the first companies to seek a cost-effective cross-platform production workflow to account for the increasing number of devices. Scott Dadich, Wired’s Editor-in-

³ Coca-Cola Content 2020 – Part One (http://www.youtube.com/watch?v=LerdMmWjU_E) and Part Two (<http://www.youtube.com/watch?v=fiwIq-8GWA8>)

Chief, emphasized in a briefing earlier this year that while it's been challenging, they're working towards more flexibility:⁴

"Bringing it all together into a cohesive workflow has been a real challenge for us. It's been tough – there's a lot more work. [...] Instead of building a product and a workflow to support, we're trying to flip that to build a workflow and a system to support these multiple design outputs... adaptive content."

- **User and context sensitive.** Context is one of the most important dimensions of content marketing and determines its impact. If brands are able to understand the context of an interaction, they can identify the right content that matches the user's interests, resonates with them and elicits an emotional response.
- **Enriched socially.** Allow your content to be commented on, shared and built upon, this will lock in customers' attention, gain more loyal brand advocates and increase your social footprint.

⁴ <http://paidcontent.org/2012/02/22/419-conde-nast-aims-to-unify-tablet-and-mobile-magazine-production/>

5. Inspired content + informed algorithms – excitement for 2013

When marketers looked at the year to come at the start of 2012, they voiced their strong opinion that social media engagement was the most *exciting* digital opportunity they faced. With another year of social programs under their belt, this activity is now becoming a reliable part of the playbook.

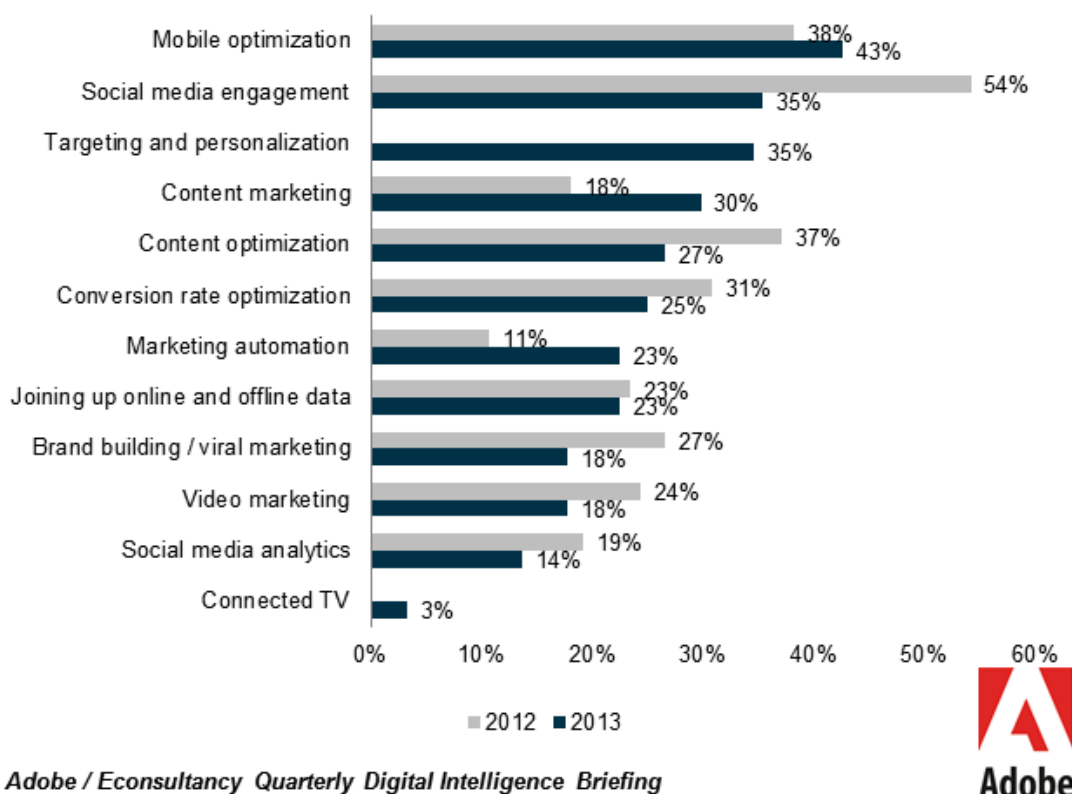
Excitement is now centered more evenly around several areas, with *mobile optimization* now enjoying a narrow lead, with *social media engagement* and *targeting & personalization* not far behind.

Before we elaborate on these three areas, it is worth highlighting a couple of other takeaways from this chart.

- There is more awareness about the potential for using technology for improved customer acquisition and retention by automating repetitive tasks and communication to help reach the right customers at the right time with the right messaging. Twice as many marketers as last year see *marketing automation* as an exciting opportunity for the year ahead.
- *Connected TV* is still not permeating marketers' consciousness as something relevant for their businesses, with only 3% ranking this among the most exciting opportunities. As consumers, most of us can see the benefits of being able to access the internet on our television, with smart TVs now widely available. But, as marketers, we are still trying to work out what this trend means in terms of connecting with our customers and prospects.

Companies

Figure 4: What are the three most exciting digital-related opportunities for your organization in 2013?



Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

Mobile optimization – when we say “mobile”, what do we mean? Are we talking about a channel or a platform, apps or websites? That’s one of the first questions that companies should ask themselves to determine their mobile maturity. Most have entered the mobile age in fits and starts, often using smartphone apps to quickly go to market without making wholesale site changes.

To move forward in “mobile optimization” means coming to grips with the reality that every experience we offer through digital channels – every web page, shopping cart and piece of rich content – must work well on any device in any location. The customer understands that concessions need to be made for the smaller screen, touchscreen input and slower speed, but they won’t accept unnecessary hassle or delay. Apps are a part of today’s approach to mobile, but they are not a broad answer to this challenge, as use of the mobile web increases daily.

Social engagement – social media has so overwhelmed marketing in the last 24 months that it’s natural that excitement would wane somewhat. Social isn’t quite as new but it remains shiny. As organizations move into the second phase of social marketing, several issues are top of mind;

- *Defining and valuing engagement* – engagement is a real characteristic of the customer relationship, but the industry has yet to agree on standards that are meaningful. The value of engagement will always be in question until all the constituents agree on a definition.
- *Social maintenance* – attracting 100,000 followers may be the easy part. There are real challenges for social strategists as they turn from building an audience to maintaining its engagement over the long haul in an increasingly crowded social stream.
- *Building cross-departmental bridges* – the value of social is relatively obvious in marketing, even if maddening to measure. However, there’s just as much potential to other parts of the organization. Many have taken steps in customer service, but marketing has to lead an internal effort to bring social data into every relevant department.

Targeting and personalization – despite concerns over the possibility of privacy-related limits to the ability to **target**, the possibilities remain exciting and for some sectors, vital. The value in placing customized messaging in front of “in market” or high-value consumers is obvious enough, but doing it in a way that’s seen as valuable instead of intrusive is an ongoing challenge.

For many consumers, the issue isn’t entirely one of privacy, but of experience. Blunt force retargeting pummels browsing shoppers with familiar images wherever they travel on the web, while ads on social networks clumsily tie their personal history to incongruous or irrelevant products. How many consumers have been bemused by offers like “We’ve got a special on tooth whitening products for graduates of [your college here]” on their Facebook pages? Nearly three-quarters, according to a recent Nielsen study.⁵

In a recent edition of the Quarterly Digital Intelligence Briefing⁶, 52% of marketers said that the ability to **personalize content** was fundamental to their online strategy. However, there is plenty of room for improvement. Some of the most powerful methods of personalization are rarely used;

- Purchase history is only leveraged by 21% of marketing organizations, while 77% of those say it has a “*high impact on ROI*”.
- Behavioral data is employed by 20% of respondents, but 68% of them report strong ROI.
- Social graph data has the highest ratio of all; only 6% usage, while nearly all of those organizations (88%) giving it high marks for ROI.

⁵ <http://blog.nielsen.com/nielsenwire/social/2012/>

⁶ <http://econsultancy.com/reports/quarterly-digital-intelligence-briefing-personalization-trust-and-roi>

What do you regard as the most important opportunity for 2013, and why are you focusing here?

“Targeting and personalization will hopefully prove to be the real winners in terms of strategic opportunities because it will help us to know more about what customers want and it will also ‘hopefully’ help us to reduce costs or optimize a better ROI on our marketing campaigns.”

“Targeting and personalization is the most important area for us as I believe that this is something that needs to go across all platforms and be a key driver of a single customer view and the enhanced profitability that will come from understanding and servicing customer needs.”

Survey respondents

6. CMOs and the role of marketing in customer experience management

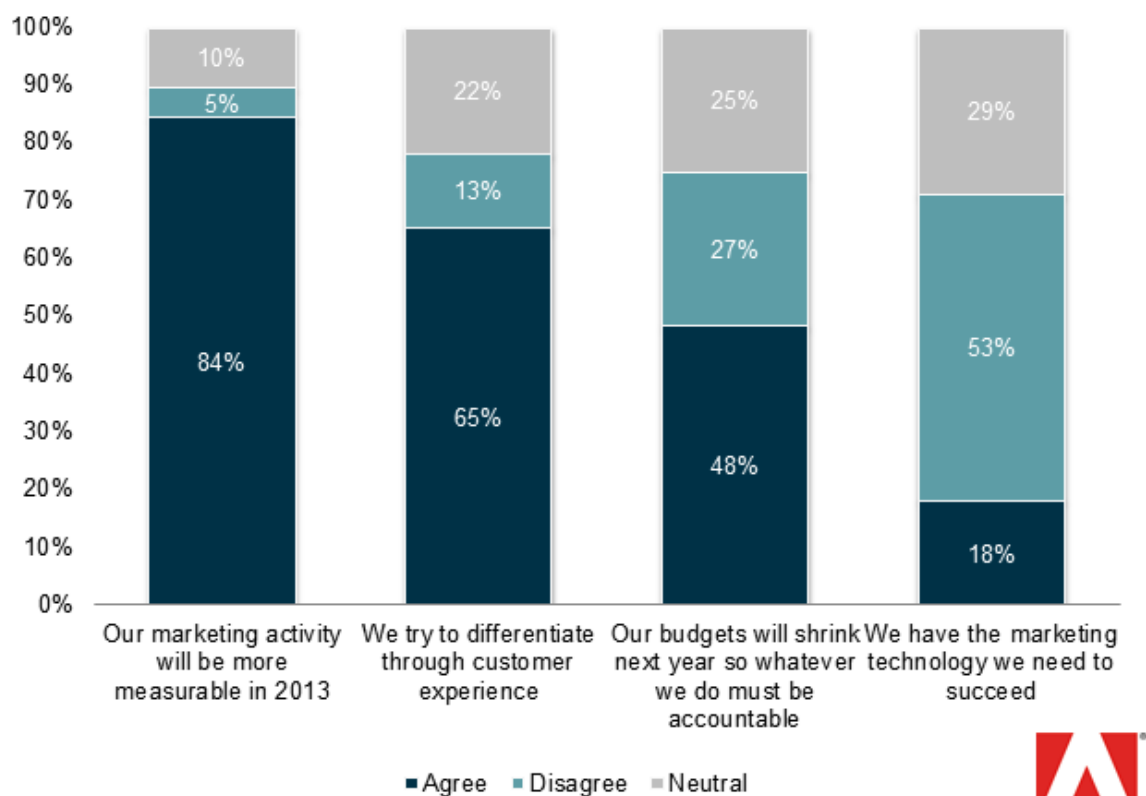
Since the early days of the web, marketers have been aware that it's not just important to provide good content, but a good experience. Every delay or confusion, broken link or coding error costs money today, and quite possibly a future customer. But "experience" goes well beyond usability, it includes not just *what we do* in brand spaces, but *how we feel* and *what we think* while we're doing it.

Now as we're well into the second decade of digital experience design, it's still a priority and a challenge; nearly two-thirds of respondents say that it's one of the ways in which they try to differentiate (*Figure 5*). And yet, a minority of organizations are satisfied with the experiences they offer online and consumers agree with them.⁷

Part of this dissatisfaction is a function of the rise of mobile. Just as marketers were getting their arms around the optimal website experience, screens got smaller and keyboards disappeared. If usability was important on a 24-inch monitor, it's paramount on the third screen.

Companies

Figure 5: Do you agree or disagree with the following statements?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



⁷ Reducing Customer Struggle, Econsultancy, June 2012 – <http://econsultancy.com/reports/reducing-customer-struggle>

Looking ahead, organizations are going to have to answer a key question: *Does marketing “own” the customer experience and where does that leave the CMO?*

To optimize the customer experience means much more than reducing the clicks between product and purchase. The greatest challenge for marketing is that a customer’s experience is now an aggregate of online and offline events, mobile and desktop, store and device, marketing and service. Yet few organizations have one executive with the mandate to correlate these disparate but connected pieces. Meanwhile, marketing leads or is involved with many of the areas that affect customer experience online and offline.

It can be argued that the CMO should aim to manage customer experience, and we have⁸. First, marketing is best positioned at most organizations to look at the whole of the experience across media and platforms.

Second, CMOs can look at this as an area of opportunity for themselves and their departments. There’s strong evidence that the customer relationship is becoming less about outgoing brand messaging and more about content and interaction. Marketing should own that evolution and shape the future.

⁸ <http://econsultancy.com/blog/11263-should-cmos-aspire-to-be-cxos>

7. Pi-shaped marketers shall inherit the digital earth

Unless you spent 2012 living in solitary confinement, big data (also discussed in *Section 3* of this report) is a phrase you will have heard and read countless times. Whether it annoyed you, confused you or intrigued you, its omnipresence has been testament to the increased role of data-driven decision making within businesses.

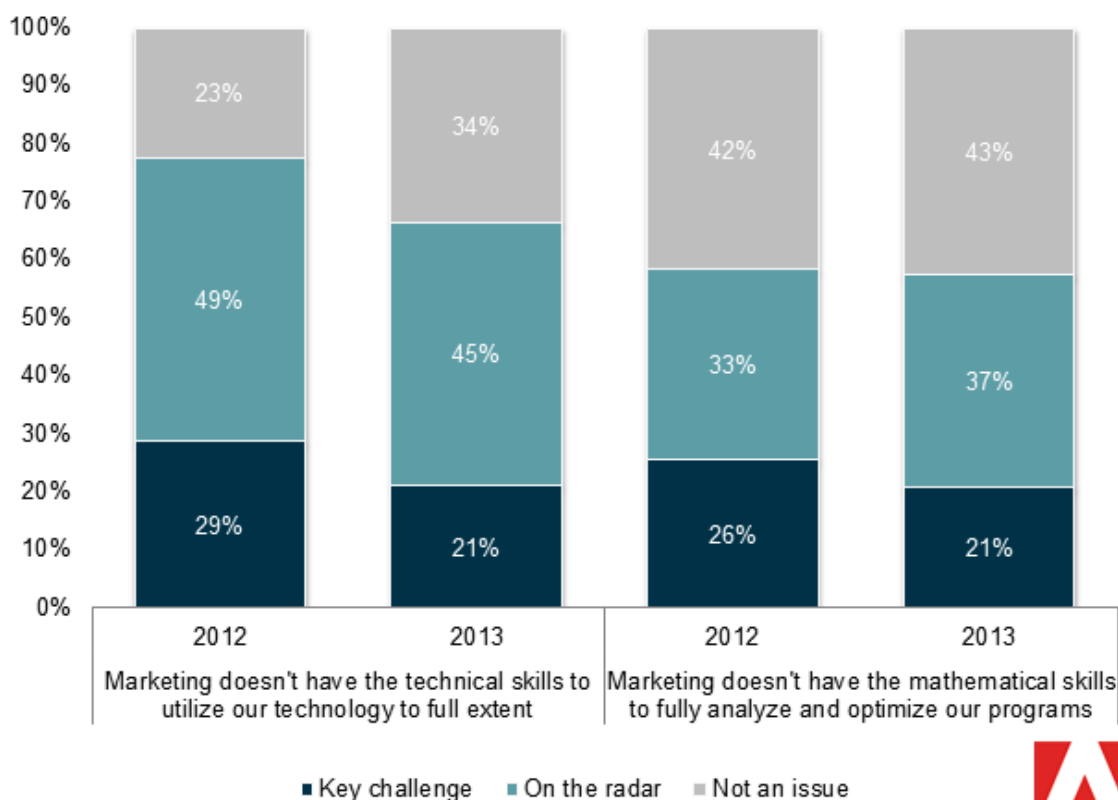
Another on-going (and related) trend is the increased role of technology within marketers' working lives. One of the most frequently quoted predictions in 2012 was Gartner's belief that, by 2017, CMOs will spend more on technology than CIOs. It is clear from *Figure 5* above that there is more scope for investment in marketing technology, with only 18% of respondents agreeing they have the marketing technology they need to succeed.

It's all very well having the shiniest new machinery available, but an on-going struggle in 2013 will be the ability of companies to make their data and tools work for them. The good news is that companies are slowly addressing the lack of technical and mathematical skills in their marketing departments, with the start of 2012 hopefully constituting the nadir before organizations started to address the skills gap.

Since last year, an impoverishment of employees skilled in these areas is less likely to represent a 'key challenge' for marketers, though this remains an on-going issue for businesses [*Figure 6*].

Companies

Figure 6: How does your organization regard the following challenges as it goes into 2013?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



While the growing importance of data analysts should not be under-estimated, the need for creative thinking in the changing world of marketing has never been greater. This year will continue to see the recruitment of ‘data scientists’⁹, who are savvy in computer science but - crucially – also able to apply creative thinking to data-driven challenges which can help to evolve and even transform businesses.

Research¹⁰ published by Econsultancy has previously emphasized the need for ‘T-shaped’ people who have the right mixture of both specialist skills (i.e. depth of knowledge) and broader commercial and strategic awareness.

Towards the end of 2012, Econsultancy CEO Ashley Friedlein coined the term ‘pi-shaped (II) people’, to explain the requirement for marketers with both left-brain and right-brain ability. Ideally, marketing departments need to have a balance of team members with both analytical and creative skills. According to Friedlein: “[*Pi-shaped marketers*] are both analytical and data-driven, yet understand brands, storytelling and experiential marketing.”

Those rare individuals who are adept in both areas are set to inherit the digital earth.

⁹ <http://econsultancy.com/blog/11262-what-is-a-data-scientist-and-do-you-need-one>

¹⁰ for Econsultancy’s [Digital Marketing: Organizational Structures and Resourcing Best Practice Guide](#)

8. Omnichannel consumers on the march – priorities for a mobile customer base

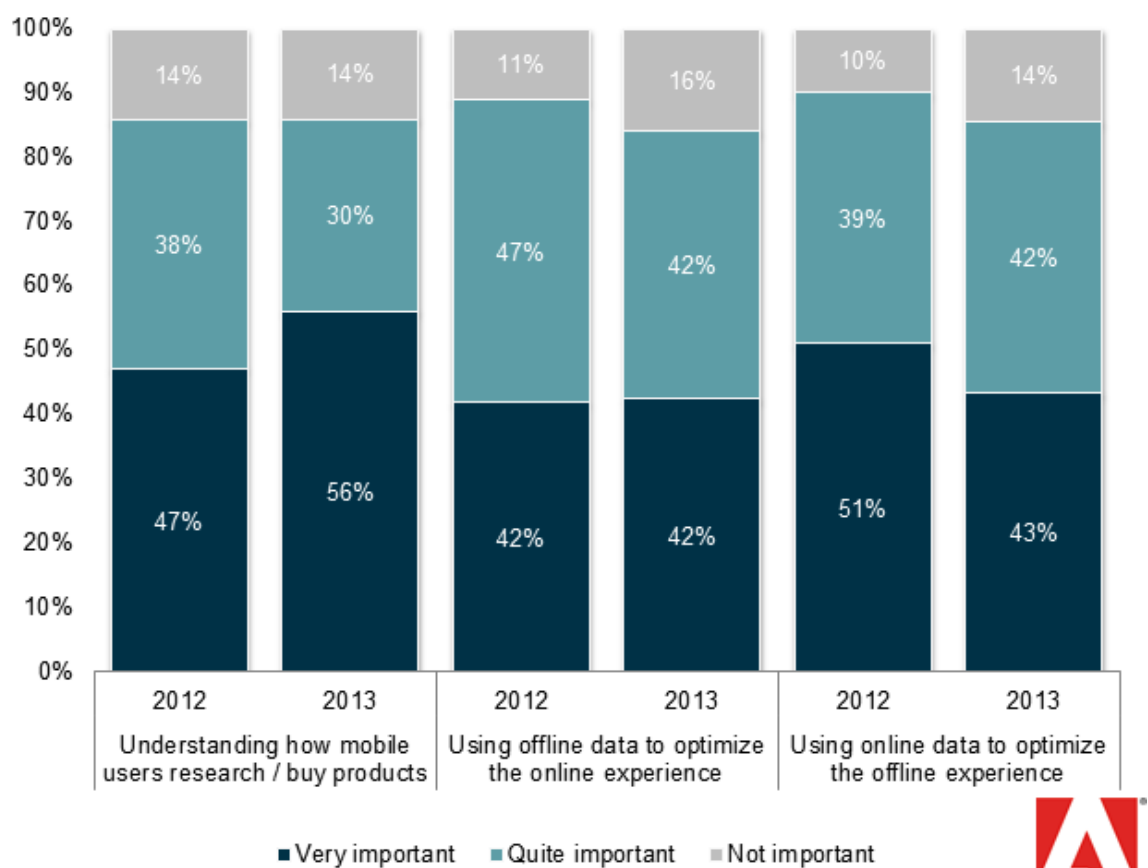
Lines between online and offline experiences are blurring and this is most evident when looking at the evolution of retail. Research has become a significant component of any purchase decision, partly driven by the prevalence of mobile devices, and the paths leading to conversion can be quite intricate.

A recent Econsultancy survey found that 44% of consumers always research purchases online before actually buying in-store, while a further 52% sometimes check online before buying in-store.¹¹

2013 will be the year when more companies actually work out what more complex customer journeys mean for their particular business and aspirations for becoming truly 'omnichannel'. Encouragingly, a larger proportion of companies than a year ago consider that '*understanding how mobile users research and buy products*' will be more important in the year ahead [Figure 7].

Companies

Figure 7: How important will the following be for your digital marketing over the next few years?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



¹¹ <http://econsultancy.com/reports/how-the-internet-can-save-the-high-street>

Digital marketers are only starting to understand how consumers conduct research and buy products, so they're quite far from bridging the online/offline gap.

The previous Econsultancy / Adobe Quarterly Digital Intelligence Briefing, which focused on marketing attribution¹², shed some light on how organizations are approaching the multichannel conundrum, with just around a third (35%) of client-side respondents indicating they are incorporating offline touch points into their attribution models.

Having a 360-degree, multichannel view of digital and offline interactions is more important than ever. However, while the way customers progress to conversion looks increasingly less like a funnel, few marketers fully grasp the importance of using data from offline channels to optimize the digital experience, and vice versa.

This is evidenced in *Figure 7*, which shows that only four in 10 client-side respondents consider that using '*offline data to optimize the online experience*' or '*online data to optimize the offline experience*' will be '*very important*' for their organizations over the next few years.

Few of the challenges preventing companies from harnessing data more effectively for marketing are beyond their control, with most of them being internal issues (e.g. lack of time, manpower or budgets), as illustrated by the tag cloud on the next page.

With online sales or web-influenced offline spending expected to account more than half of retail sales in the next few years, brands need to start capitalizing on the online/offline crossover and help potential buyers navigate to checkout, either online or in-store. The real commercial advantage will no longer lie in square footage, but in collecting, integrating and using data in the right ways to facilitate multichannel experiences.

What, if anything, prevents you from harnessing data more effectively for marketing?

"Multiple tools and tracking, cross-device behavior tracking, third party data is being used incorrectly due to old, antiquated approaches and getting it to implement."

"The wide variety of data sources available which conflict with each other. I understand why they conflict, but the business doesn't and then writes everything off as 'inaccurate'."

"Partly financial pressure, partly lack of joined up knowledge – we have a digital marketing team and a marketing team but we're not working together properly on data yet."

"Lack of reasonably priced business analytics human resources. Tools abound, but people who can fine tune your data (not cookie cutter) and that truly get it are not in abundance."

"Not knowing what technology to use, not having the time to effectively analyze and optimize, and organization-level technology implementation difficulties."

"Systems that don't link up and staff that don't have the time and skills to do the necessary analysis."

"A lack of incentive towards joining up all the datasets. Most clients are heavily siloed – either due to departmental politics or a lack of cohesive vision. The biggest issue facing companies in this area is the fact that their culture hasn't changed to reflect the possibilities of shared data and attribution. This is not a technical issue (it is in the latter stages), but more a staff responsibility/vision issue."

"Data professionals in-house are quite disconnected from marketing department, and are largely functional teams to deliver information."

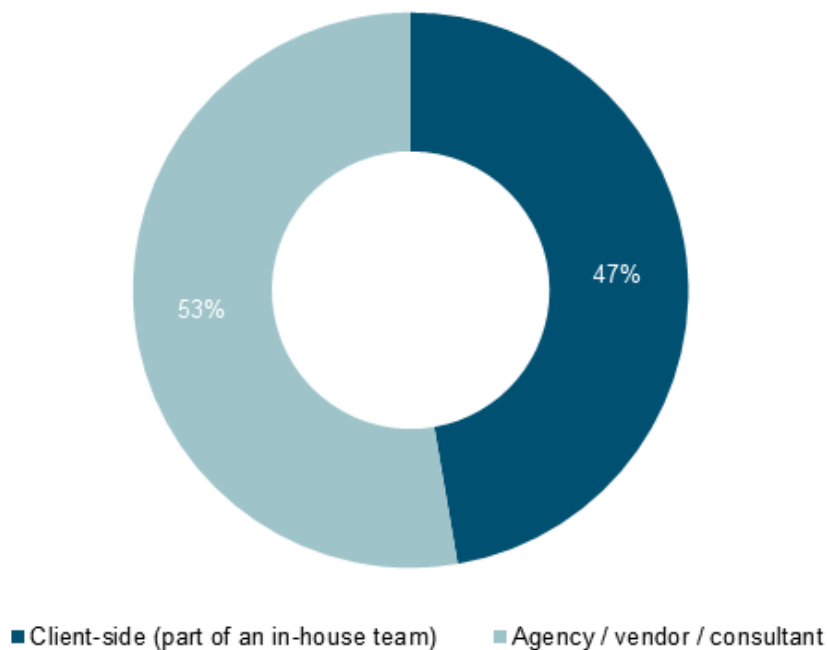
Survey respondents

¹² <http://econsultancy.com/reports/quarterly-digital-intelligence-briefing-making-sense-of-marketing-attribution>

9. Appendix: Respondent profiles

This eighth Quarterly Digital Intelligence Briefing is based on an online survey of more than 700 client-side and agency respondents, carried out in October 2012.

Figure 9: Which of the following best describes your company or role?

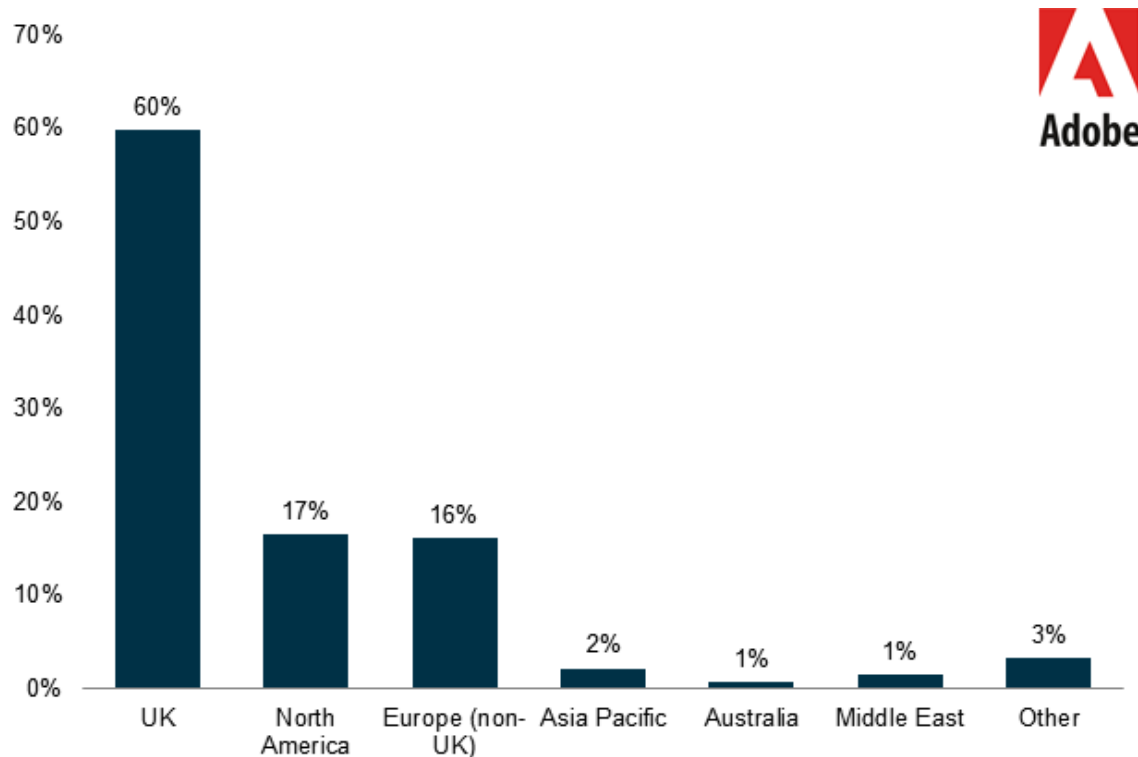


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9.1. Geography

The majority of respondents are based in the UK. Just under a fifth (17%) of respondents are based in North America and 16% in Europe (non-UK). Other countries and regions represented include Australia, South America and the Middle East.

Figure 10: In which country / region are you (personally) based?

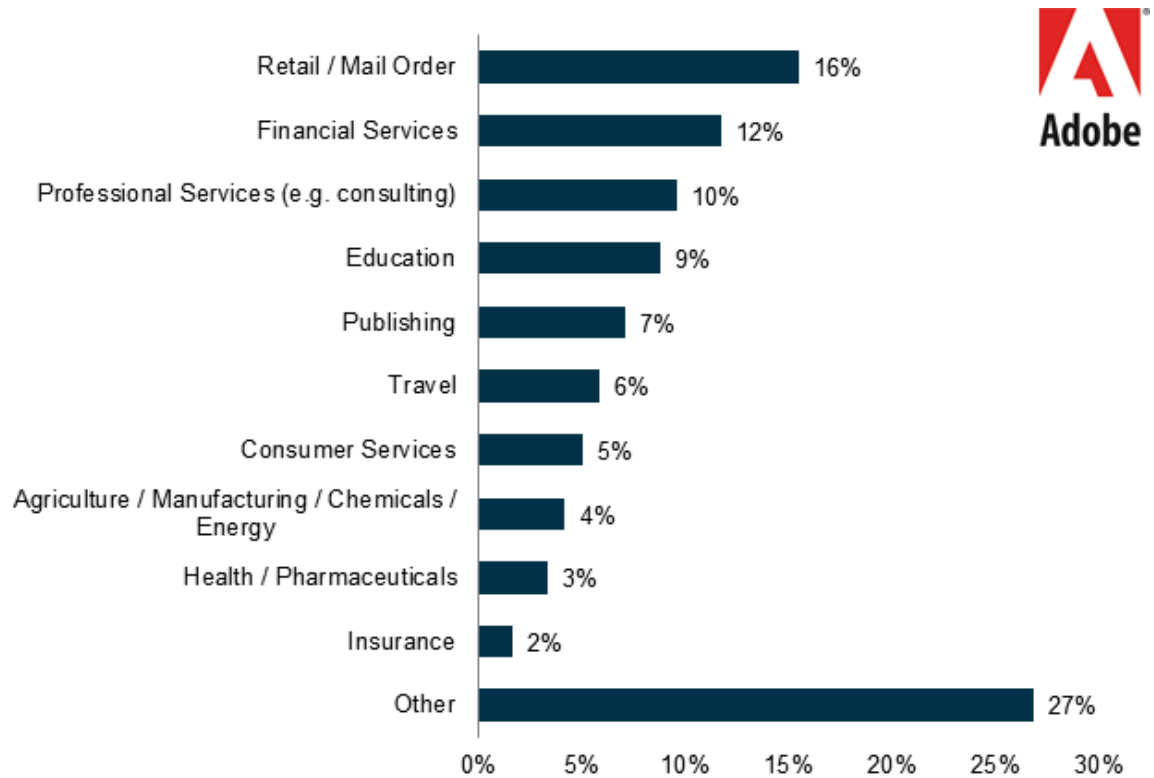


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9.2. Business sector

Respondents work across a wide range of different industry sectors. The best represented sectors are *retail and mail order* (16%), *financial services* (12%), *professional services* (10%) and *education* (9%). Just over a quarter of respondents (27%) specify 'other' as their sector. Other sectors included *public sector/not-for profit* and *IT*.

Figure 11: In which business sector is your organization?

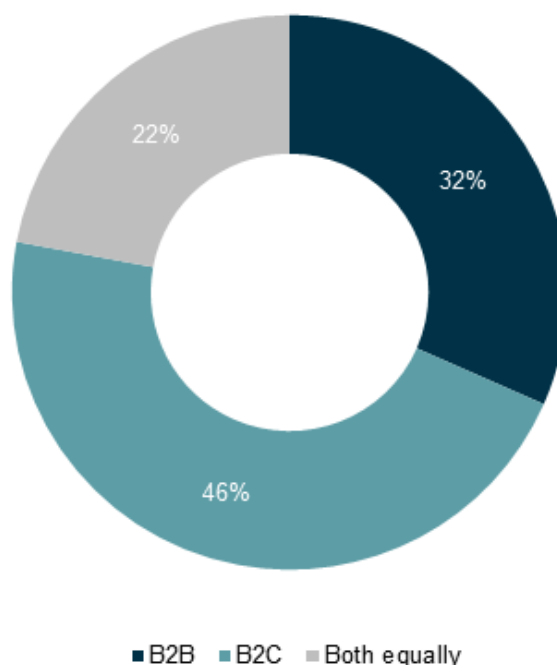


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9.3. Business focus

The chart below shows to what extent businesses are focused on B2B, B2C, or both. Just under half of respondents (46%) are exclusively focused on B2C, while around a third (32%) are B2B focused. Just over a fifth (22%) are focused on both B2B and B2C.

Figure 12: Is your business focused more on B2B or B2C?



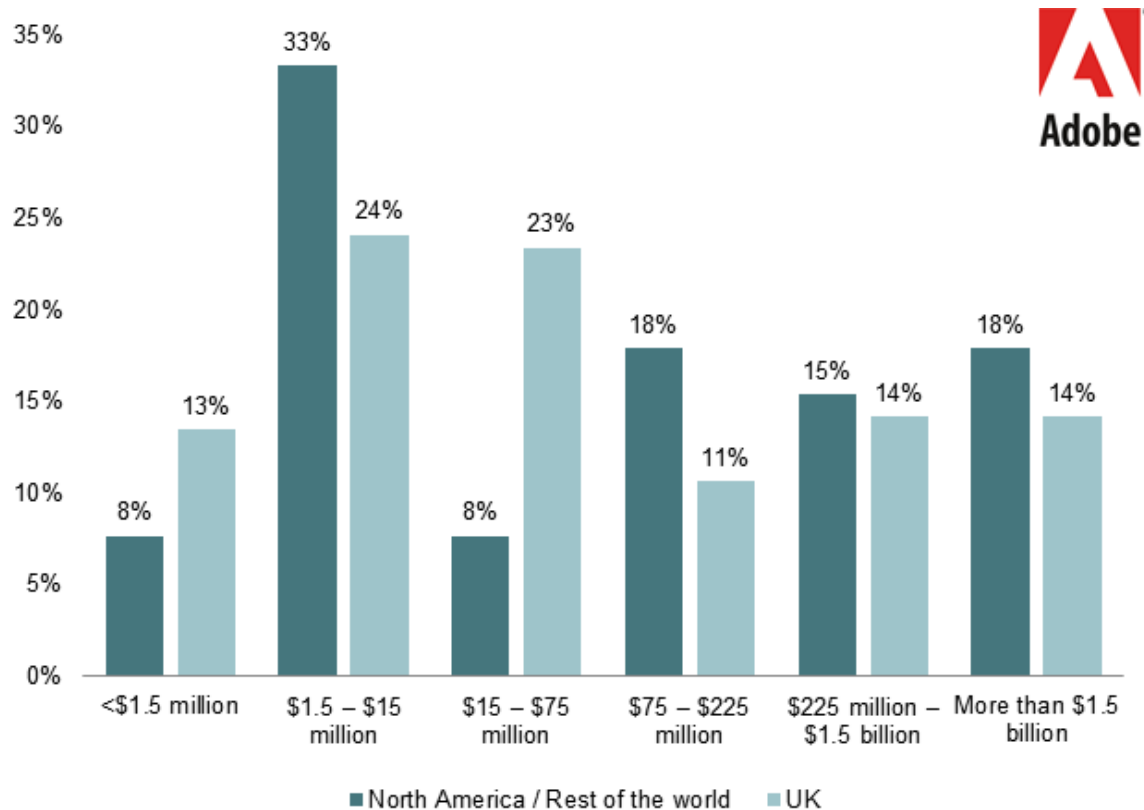
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9.4. Size of company by revenue

The chart below shows the annual revenue of responding (client-side) organizations.

Client-side respondents

Figure 13: What is your annual company turnover?



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