

2015 Marketing Trends Survey

Email marketing budgets continue to rise as marketers strive to improve automation, relevancy and data access

A new StrongView industry survey conducted with SENSORPRO from November 21 to December 5, 2014, reflects the attitudes of 377 business leaders in regards to their planned marketing budgets, priorities and challenges for 2015. This year's survey also provides unique insight into how email marketers plan to increase their use of automation to drive relevance and engagement.

According to the data, marketing budgets will continue to grow in 2015, with 54% of companies increasing and 40% maintaining current levels. The number of companies increasing budgets has grown 20% over 2014, when only 46% reported that they were increasing budgets. Email marketing continues its status as the top channel attracting increased investment, followed by social media and mobile marketing.

Accessing and leveraging customer data continues to be the top challenge facing email marketers in 2015, due to issues related to data cleanliness, budget and resources. The data also shows that triggered and lifecycle programs will be the top targets of increased spend, as email marketers embrace email automation to enable more one-to-one messaging.

The following charts highlight the most relevant and significant data points from the survey. More information on the survey can be found in the press release distributed on December 10, 2014: www.strongview.com/2015SurveyRelease



1. What is the size of your organization?

| 1-50 Employees | 33.51% |
|-----------------------------|--------|
| 51-100 Employees | 10.64% |
| 101-500 Employees | 19.15% |
| 501-1000 Employees | 8.24% |
| More than 1,000 Employees | 28.19% |
| Don't know/decline to state | 0.27% |

2. Where is your company headquartered?

| North America | 73.40% |
|------------------|--------|
| Central America | 1.60% |
| South America | 1.06% |
| Europe | 17.02% |
| Asia | 4.79% |
| Middle East | 0.27% |
| Africa | 1.06% |
| Decline to state | 0.80% |



3. What industry is your company in?

| Automotive | 3.49% |
|----------------------------------|--------|
| Business Services | 3.49% |
| Education | 3.76% |
| Financial Services | 9.41% |
| Healthcare | 4.30% |
| Manufacturing | 2.42% |
| Marketing/ Advertising | 16.40% |
| Media/ Entertainment/ Publishing | 9.14% |
| Non-profit | 4.03% |
| Online Services | 2.96% |
| Retail | 10.48% |
| Technology/ Internet | 14.25% |
| Travel/ Leisure/ Hospitality | 7.53% |
| Other | 8.33% |

4. How do you expect your marketing budget to change in 2015?

| Increase | 54.22% |
|-------------------------------|--------|
| Decrease | 5.72% |
| Maintain current spend levels | 40.05% |



5. By what percentage do you expect the marketing budget to increase?

| Less that 5% | 19.69% |
|------------------|--------|
| 5% to 10% | 46.63% |
| Greater than 10% | 33.68% |

6. Please indicate the programs for which you plan to increase spend

| Print Advertising | 11 <mark>.75%</mark> |
|-------------------------------|----------------------|
| Radio/ Television Advertising | 7.65% |
| Online Display Advertising | 37.43% |
| Direct Mail | 16.94% |
| Email Marketing | 60.66% |
| Mobile Marketing | 40.16% |
| Public Relations | 16.67% |
| Search (SEO/ PPC) | 38.25% |
| Social Media | 48.91% |
| Tradeshows & Events | 18.0 <mark>3%</mark> |
| Other | 8.20% |



7. Please indicate the programs for which you plan to decrease spend

| Print Advertising | 33.24% |
|------------------------------|-----------------------|
| Radio/Television Advertising | 17.8 <mark>2</mark> % |
| Online Display Advertising | 7.98% |
| Direct Mail | 22.34% |
| Email Marketing | 4.26% |
| Mobile Marketing | 1.33% |
| Public Relations | 5.85% |
| Search (SEO/PPC) | 5.85% |
| Social Media | 5.05% |
| Tradeshows & Events | 16.7 <mark>6%</mark> |
| Other | 23.40% |



8. On which email marketing programs do you plan to increase spend?



8A. On which of the following lifecycle email marketing programs are you increasing spend?

| Welcome | 35.89% |
|---|----------------------|
| Loyalty | 45.21% |
| Social Opt-In | 17.2 6% |
| Mobile Opt-In | 17.81% |
| Cart Abandonment | 19.18% |
| Winback/ Reengagement | 26.85% |
| Birthday/ Anniversary | 10.68% |
| Browse Retargeting | 23.84% |
| Renew/ Replenish | 15. 07% |
| Post-Purchase | 26.85% |
| Product/ Service reviews | 18.0 <mark>8%</mark> |
| Surveys | 22.19% |
| Mobile Wallet Apple Pay/ Google Wallet | 4.38% |
| Other | 9.86% |



9. What are your most important email marketing initiatives in 2015? -Top 3

| Increasing subscriber engagement | |
|---------------------------------------|--|
| 1 | 39.63% |
| 2 | 5.05% |
| 3 | 5.59% |
| Improving data analysis to better und | derstand customer context |
| 1 | 10.64% |
| 2 | 12.50% |
| 3 | 5.59% |
| mproving segmentation and targeting | ng |
| 1 | 14. <mark>6</mark> 3% |
| 2 | 17.82% |
| 3 | 12.50% |
| Implementing more lifecycle messag | ing |
| 1 | 6.12% |
| 2 | 10.64% |
| 3 | 10.90% |
| Accessing more data sources to imp | rove targeting and relevance |
| 1 | 3.46% |
| 2 | 5.05% |
| 3 | 7.71% |
| Implementing a data-driven CRM stra | ategy to get a holistic view of the customer |
| 1 | 5.59% |
| 2 | 8 .51% |
| 3 | 8,51% |



9. What are your most important email marketing initiatives in 2015? -Top 3 (Continued)

| Orchestrating messaging across char | nnels |
|--|--------------------------------|
| 1 | 2.39% |
| 2 | 3.99% |
| 3 | 6.65% |
| ntegrating marketing into transaction | nal and event-triggered emails |
| 1 | 1.60% |
| 2 | 6.12% |
| 3 | 5.59% |
| ntegrating mobile and email marketin | ng |
| 1 | 1.86% |
| 2 | 7.71% |
| 3 | 6.65% |
| Jsing display retargeting to improve e | email performance |
| 1 | 0.53% |
| 2 | 1.86% |
| 3 | 1.60% |
| Growing your opt-in email list | |
| 1 | 6.12% |
| 2 | 10.11% |
| 3 | 8.24% |
| Re-engaging inactive subscribers | |
| 1 | 1.60% |
| 2 | 4.52% |
| 3 | 8.51% |



9. What are your most important email marketing initiatives in 2015? -Top 3 (Continued)

| Improving deliverability | |
|---|-------|
| 1 | 1.86% |
| 2 | 2.39% |
| 3 | 4.79% |
| Reducing costs | |
| 1 | 2.66% |
| 2 | 1.86% |
| 3 | 3.72% |
| Centralizing your email onto one platform | |
| 1 | 1.33% |
| 2 | 1.86% |
| 3 | 3.46% |



10. What are your biggest email marketing challenges heading into 2015? -Top 3

| 1 | 29.79% |
|--|--|
| 2 | 9.04% |
| 3 | 9.04% |
| Coordination across marketing of | channels (e.g., mobile, social, display, etc.) |
| 1 | 15.69% |
| 2 | 14. <mark>89%</mark> |
| 3 | 10.11% |
| Inderstanding the current conte | ext of each customer |
| 1 | 11 <mark>.97%</mark> |
| 2 | 13.30% |
| 3 | 1 <mark>1</mark> .97% |
| | |
| Developing more relevant engag | ements |
| Developing more relevant engag | ements |
| | and the second s |
| 1 | 12 .77% |
| 1 2 3 | 12.77% 14.89% |
| 2 | 12.77% 14.89% |
| 1 2 3 /isibility into response data | 12.77% 14.89% 14.89% |
| 1 2 3 /isibility into response data 1 | 12.77% 14.89% 14.89% |
| 1 2 3 /isibility into response data 1 | 12.77% 14.89% 14.89% 2.39% 6.12% 7.18% |
| 1 2 3 /isibility into response data 1 2 3 | 12.77% 14.89% 14.89% 2.39% 6.12% 7.18% |
| 1 2 3 /isibility into response data 1 2 3 Managing email send cadence/fi | 12.77% 14.89% 14.89% 2.39% 6.12% 7.18% |



10. What are your biggest email marketing challenges heading into 2015? - Top 3 (Continued)

| Content management | |
|---------------------------------------|--------|
| 1 | 5.85% |
| 2 | 12.23% |
| 3 | 11.97% |
| Controlling costs | |
| 1 | 3.99% |
| 2 | 2.66% |
| 3 | 5.05% |
| Lack of resources/staff | |
| 1 | 6.91% |
| 2 | 10.37% |
| 3 | 13.03% |
| Maintaining high email deliverability | |
| 1 | 4.79% |
| 2 | 7.71% |
| 3 | 9.04% |
| Other | |
| 1 | 0.27% |
| 2 | 0.27% |
| 3 | 1.86% |



11. What channels are you planning to integrate email with in 2015?

| Mobile | 54.79% |
|--------------|-----------------------|
| Display | 18.6 <mark>2</mark> % |
| Social Media | 46.54% |
| Search | 19.68% |
| None | 14. <mark>8</mark> 9% |
| Other | 7.18% |

12. What data are you currently leveraging to power your email marketing programs?

| Demographic | 50.80% |
|-------------------------------------|-----------------------|
| Purchase history | 47.61% |
| Web Behavior | 30.05% |
| Life stage | 26.60% |
| Sentiment | 5.32% |
| Channel engagement | 22.61% |
| Device engagement | 18.3 <mark>5</mark> % |
| Location data | 25.53% |
| Shopping/ browse behavior | 18.0 <mark>9</mark> % |
| External feeds eg weather, economic | 2.66% |
| Other | 8.78% |



13. What is the most valuable type of data that you're currently not able to leverage in your email marketing programs?

| Demographic | 14.89% |
|-------------------------------------|-----------------------|
| Purchase history | 12.23% |
| Web Behavior | 31.12% |
| Life stage | 19.15% |
| Sentiment | 20.21% |
| Channel engagement | 13. <mark>5</mark> 6% |
| Device engagement | 15.96% |
| Location data | 9.84% |
| Shopping/ browse behavior | 19.15% |
| External feeds eg weather, economic | 14.36% |
| Other | 7.45% |



14. What's your biggest challenge to leveraging more data in your email marketing programs?

| Data access | 11.97% |
|------------------------------------|--------|
| Data analysis | 10.64% |
| Data latency | 2.39% |
| Data cleanliness/quality | 13.56% |
| System performance | 3.72% |
| Ability to quickly act on insights | 9.84% |
| Lack of strategy | 9.04% |
| Lack proper tools | 7.98% |
| Lack of resources | 11.44% |
| Lack of budget | 12.23% |
| Data volume | 3.19% |
| Data movement (ETL) | 1.86% |
| Other | 2.13% |



15. Please identify the top three performing networks for your social media marketing efforts

| Facebook | |
|-----------|----------------|
| 1 | 60.11% |
| 2 | 15.43% |
| 3 | 11.70% |
| Twitter | |
| 1 | 10.90% |
| 2 | 45.21% |
| 3 | 17.0 2% |
| YouTube | |
| 1 | 6.65% |
| 2 | 11.44% |
| 3 | 23.67% |
| Google+ | |
| 1 | 2.39% |
| 2 | 3.72% |
| 3 | 9.84% |
| Pinterest | |
| 1 | 1.06% |
| 2 | 4.26% |
| 3 | 5.32% |
| LinkedIn | |
| 1 | 16.4 9% |
| 2 | 14.89% |
| 3 | 19.15% |



15. Please identify the top three performing networks for your social media marketing efforts (Cont)

| Instagram | |
|-----------|-------|
| 1 | 1.06% |
| 2 | 3.99% |
| 3 | 7.71% |
| Yelp | |
| 1 | 0.80% |
| 2 | 0.53% |
| 3 | 1.60% |
| Flickr | |
| 1 | 0% |
| 2 | 0% |
| 3 | 1.86% |
| Vine | |
| 1 | 0% |
| 2 | 0.27% |
| 3 | 1.33% |
| Tumbir | |
| 1 | 0.53% |
| 2 | 0.27% |
| 3 | 0.80% |



16. What email marketing programs are you employing to generate more business during the 2014/2015 winter holiday shopping season? - Top 3

| Promotion of sales or savings | |
|-----------------------------------|------------------------------|
| 1 | 40.69% |
| 2 | 12.23% |
| 3 | <mark>9</mark> .04% |
| Integration of cross/upsell offer | rs into transactional emails |
| 1 | 1 <mark>0.37%</mark> |
| 2 | 18.0 <mark>9</mark> % |
| 3 | 14. 89% |
| Cart abandonment program | |
| 1 | 3.72% |
| 2 | 1 <mark>1</mark> .17% |
| 3 | 9.84% |
| Post-purchase program | |
| 1 | 5.32% |
| 2 | 10.64% |
| 3 | 11.17% |
| Refer-a-friend program | |
| 1 | 6.38% |
| 2 | 13.03% |
| 3 | 12 .77% |
| Promotion of in-store sales eve | ents |
| 1 | 2.93% |
| 2 | 5.59% |
| 3 | 8.24% |



16. What email marketing programs are you employing to generate more business during the 2014/2015 winter holiday shopping season? - Top 3 (Continued)

| Product recommendations | |
|-------------------------|----------------------|
| 1 | 5.59% |
| 2 | 17.0 2% |
| 3 | 18.0 <mark>9%</mark> |
| Newsletter | |
| 1 | 25.00% |
| 2 | 12.23% |
| 3 | 15.9 6% |



17. What tactics are you employing via email marketing to generate more business during the 2014/2015 winter holiday shopping season? - Top 3

| Segmentation and targeting | |
|---|----------------------|
| 1 | 54.26% |
| 2 | 13.03% |
| 3 | 11.70% |
| Leveraging more data to improve relevancy | |
| 1 | 8.51% |
| 2 | 24.47% |
| 3 | 20.21% |
| Increased volume | |
| 1 | 12.50% |
| 2 | 17.5 <mark>5%</mark> |
| 3 | 22.07% |
| Earlier start to holiday season | |
| 1 | 8 <mark>.78%</mark> |
| 2 | 8.24% |
| 3 | 5.85% |
| Free shipping | |
| 1 | 2.93% |
| 2 | 8.78% |
| 3 | 4.52% |
| Subject line testing | |
| 1 | 6.91% |
| 2 | 17.82% |
| 3 | 18.62% |
| Offer testing | |
| 1 | 6.12% |
| 2 | 10.11% |
| 3 | 17.0 2% |



18. How is your investment in email marketing changing for the 2014/2015 winter holiday shopping season?

| Increasing | 33.69% |
|------------------|--------|
| Decreasing | 6.90% |
| Staying the same | 59.42% |

19. Are you planning to leverage location-based marketing to generate more business during the 2014/2015 winter holiday season?





About the Survey

The StrongView "2015 Marketing Trends Survey" was administered online in conjunction with StrongView's survey partner SENSORPRO. The poll, which gathered feedback from 377 business leaders across a wide range of industries, was conducted from November 21 to December 5, 2014.

About StrongView

StrongView's cross-channel marketing solutions provide enterprise marketers with the tools, services and insights required to effectively engage today's constantly connected customers. Combining a powerful cross-channel campaign management solution with market-leading data access and analysis, StrongView's Marketing Cloud enables marketers to understand the current context of each customer and respond in real time with relevant messages across email, mobile, social, display and web.

A champion of "Present Tense Marketing," StrongView is committed to delivering solutions that reflect the new reality of the technology-empowered customer. Based in Redwood City, CA and backed by leading venture capital investors, StrongView has been helping global brands in retail, travel, finance, entertainment and online services overcome the limitations of other marketing platform providers for more than a decade.