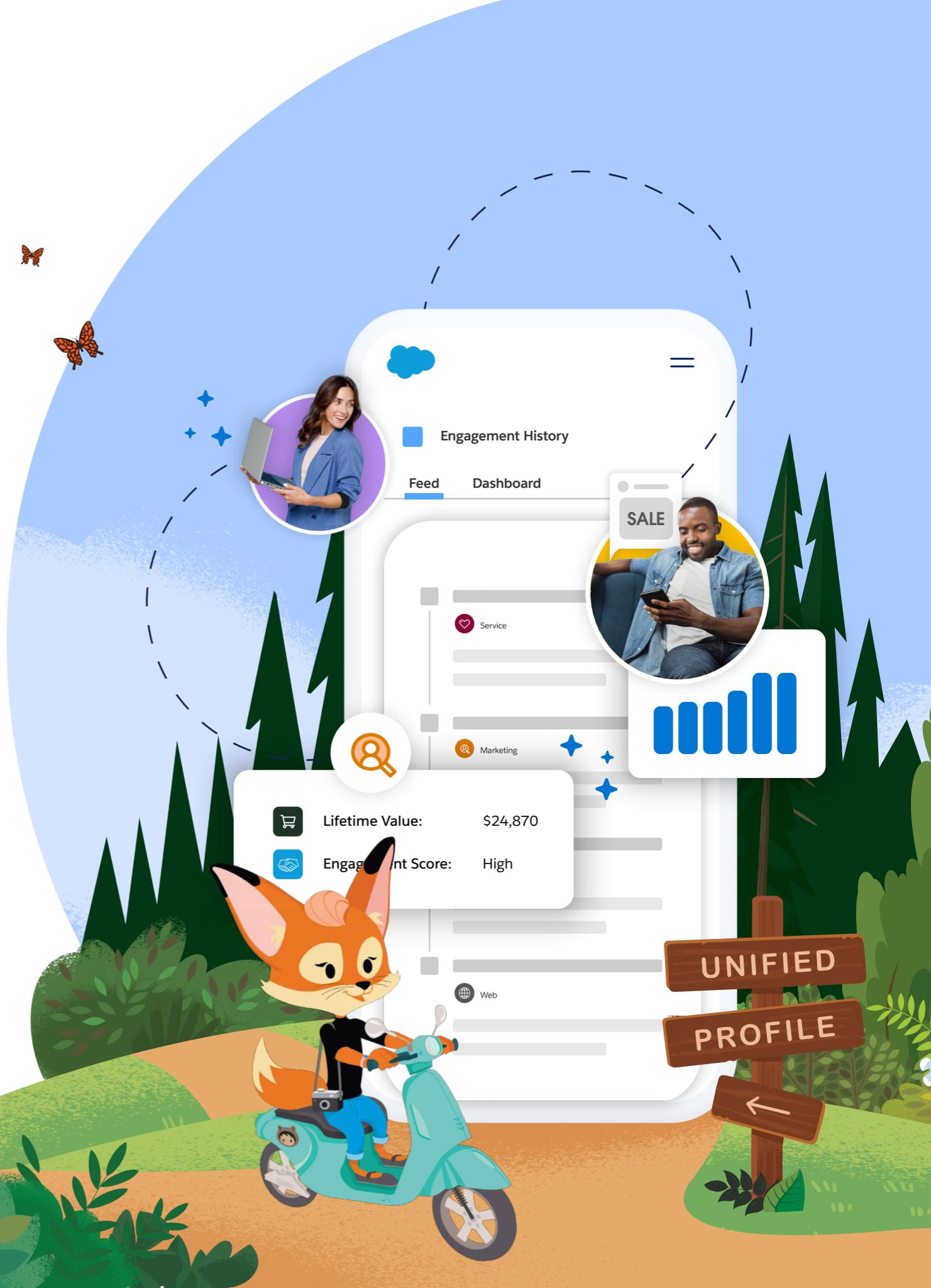


salesforce

8TH EDITION

State of Marketing

Insights and trends from 6,000 marketers and over 2 trillion outbound marketing communications



Executive Letter



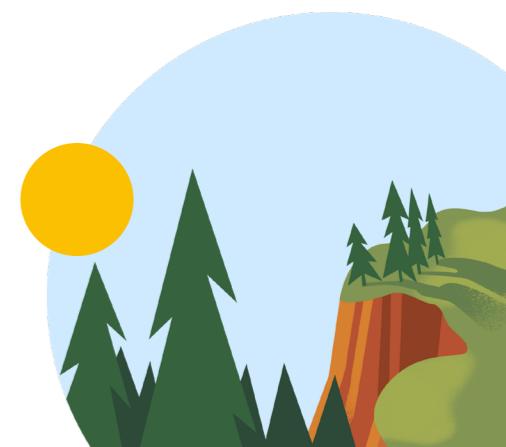
We have been through so much these past few years, adapting our strategies and practices to navigate a rapidly changing and challenging environment. Companies everywhere are looking to their CMO and marketing teams to meet customers' digital-first expectations, do more with less in the face of economic headwinds, and accommodate evolving data privacy laws to prepare for a cookieless future.

It's a new day for marketers, a time of tremendous transformation that requires us to reimagine how we connect with customers and personalize every interaction; achieve our budget and business goals in an uncertain economic environment; and lead with our values to help shape a better, more equitable and sustainable future.

Salesforce collected insights from marketing leaders worldwide to understand how they're prioritizing their efforts in this new day. What did we discover in this year's "State of Marketing" report? Marketers and businesses are leading with values, while embracing innovation. They're prioritizing driving as much value as possible from existing tools and technologies, while focusing new investments in key areas like automation and productivity.

I hope you find this year's "State of Marketing" report a helpful guide to navigating the ever-changing marketing landscape and delivering exceptional customer experiences that build lasting relationships.

Sarah Franklin
President & CMO
Salesforce



What You'll Find in This Report

For the eighth edition of our “State of Marketing” report, Salesforce Research surveyed 6,000 marketing leaders worldwide to discover how marketers are:

- Evolving in the face of uncertainty
- Preparing for the retirement of third-party cookies
- Removing silos to enhance the customer experience
- Innovating to meet changing customer needs

This report is based on a third-party, double-blind survey conducted from June 30 to August 8, 2022, that generated 6,000 responses from marketing managers, directors, VPs, and CMOs across 35 countries. See **page 29** for further survey demographics.

Platform data referenced in this report comes from aggregated data from the activity of over 2 trillion messages sent using the Salesforce Platform between 2020 to Q2 2022. Additional data hygiene factors are applied to ensure consistent metric calculation. The Salesforce Shopping Index and related datasets are not indicative of the operational performance of Salesforce or its reported financial metrics including gross merchandise value (GMV) growth and comparable customer GMV growth.

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



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

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%

High performers

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

18%

Underperformers

Moderately or less satisfied with their overall marketing performance

67%

Moderate performers

All other marketers

Contents

Executive Summary	05
Chapter 1 Marketers Focus on Driving Value Amidst Change	07
Chapter 2 Innovative Channels and Tactics Redefine Customer Engagement	10
Spotlight: Marketers Explore New Frontiers	14
Chapter 3 Marketers Walk the "Personalization vs. Privacy" Tightrope	15
Chapter 4 KPIs Shift as Marketers Adopt Real-Time Intelligence	18
Spotlight: B2B Marketers Drive Cross-Channel Experiences with ABM	20
Chapter 5 Distributed Teams Unite with Collaboration Technology	21
Chapter 6 Marketers Lead with Values	22
Case Study: Salesforce Marketing Team Bets on Values	23
Survey Demographics	29



Executive Summary

01

Marketers Focus on Driving Value Amidst Change

Although macroeconomic instabilities have teams examining their budgets and fine-tuning their tech stack, marketers remain determined in the face of change. **Eighty-seven percent of marketers say their work provides greater value now than it did a year ago.**

02

Innovative Channels and Tactics Redefine Customer Engagement

Brands are investing in a combination of channels and technologies to reach their audiences and build lasting customer relationships. **Eighty-three percent of marketers say their marketing organizations engage customers in real time across one or more marketing channels.**

03

Marketers Walk the "Personalization vs. Privacy" Tightrope

Marketers are adapting to changes in privacy regulations and calls for data transparency. **With the end of third-party cookies on the horizon, 68% of marketers have a fully defined strategy to shift toward first-party data.**

04

KPIs Shift as Marketers Adopt Real-Time Intelligence

Across every stage of the funnel, marketers are tracking more metrics year over year than ever before. Speed to insight remains a competitive advantage, with **72% of high-performing marketers able to analyze marketing performance in real time.**

05

Distributed Teams Unite with Collaboration Technology

Recognizing that remote and distributed work is here to stay, leaders are making investments in how marketing teams collaborate. **Marketers have adopted an average of four collaboration technologies, and 70% expect these investments to be permanent.**

06

Marketers Lead with Values

Today's customers want their values reflected in the brands they buy from, and marketers are responding. **Eighty-five percent of marketers say their external messaging reflects corporate values.**

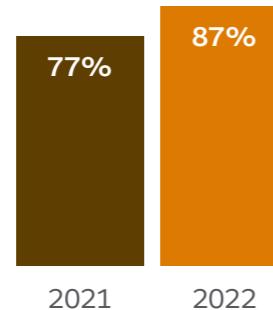


INTRODUCTION

Today's marketers have more tools, technology, and data than ever before, with sophisticated strategies in place to build lasting customer relationships. But macroeconomic uncertainty has brought about roadblocks, with insufficient human resources, strained global supply chains, and budgetary constraints creating challenges for businesses and customers alike. Amid all of this change, marketers are still more determined than ever, with **87% of marketers saying their work provides greater value now than it did a year ago** – a 10 percentage point jump from last year.

As customers continue to navigate a changing world, new trends have emerged around the value of trust. Eighty-eight percent of customers believe that trust becomes more important in times of change.¹ CMOs are specifically focused on this, with “building trust” in their top three priorities this year.²

Marketers Who Feel Their Work Provides Greater Value Now Than a Year Ago



“ Today’s marketing leaders have a huge challenge ahead of them when it comes to striking a balance between customer data, personalization, and trust. But there’s also an opportunity: the brands who do this well have a chance to grow relationships and win customers for life. There’s never been a more exciting time to be a marketer.”

ANA VILLEGAS,
CMO, NI

¹ “State of the Connected Customer,” Salesforce, May 2022

² See p. 26 of appendix

01

Marketers Focus on Driving Value Amidst Change

Marketers are prioritizing getting the most out of their investments. Technology is front and center in this effort – with subpar use of tools and technologies the subject of marketers' top challenge **and** priority.

A large share of marketers also say marketing ROI and attribution is a top challenge, complicating their abilities to demonstrate cost efficiency during market turbulence.

With changing consumer preferences, shifting buying behaviors, and rising customer expectations, marketers remain future-focused and cite “experimenting with new marketing strategies” as their #2 priority. This drive for innovation comes from the top: **91% of CMOs say they must continually innovate to remain competitive.** Against a backdrop of privacy concerns and institutional distrust, building and retaining customer trust remains a perennial priority and challenge.

Marketers Focus on Tools and Innovation to Meet the Moment

Marketers' Top Priorities

- ① **Improving use of tools and technologies**
- ② **Experimenting with new marketing strategies and tactics**
- ③ **Modernizing tools and technologies**
- ④ **Building/retaining trust with customers**
- ⑤ **Improving collaboration**
- ⑥ **Balancing personalization with customer comfort levels**

Marketers' Top Challenges

- ① **Ineffective use of tools and technologies**
- ② **Measuring marketing ROI/attribution**
- ③ **Balancing personalization with customer comfort levels**
- ④ **Building/retaining trust with customers**
- ⑤ **Resistance to new marketing strategies/tactics**



01

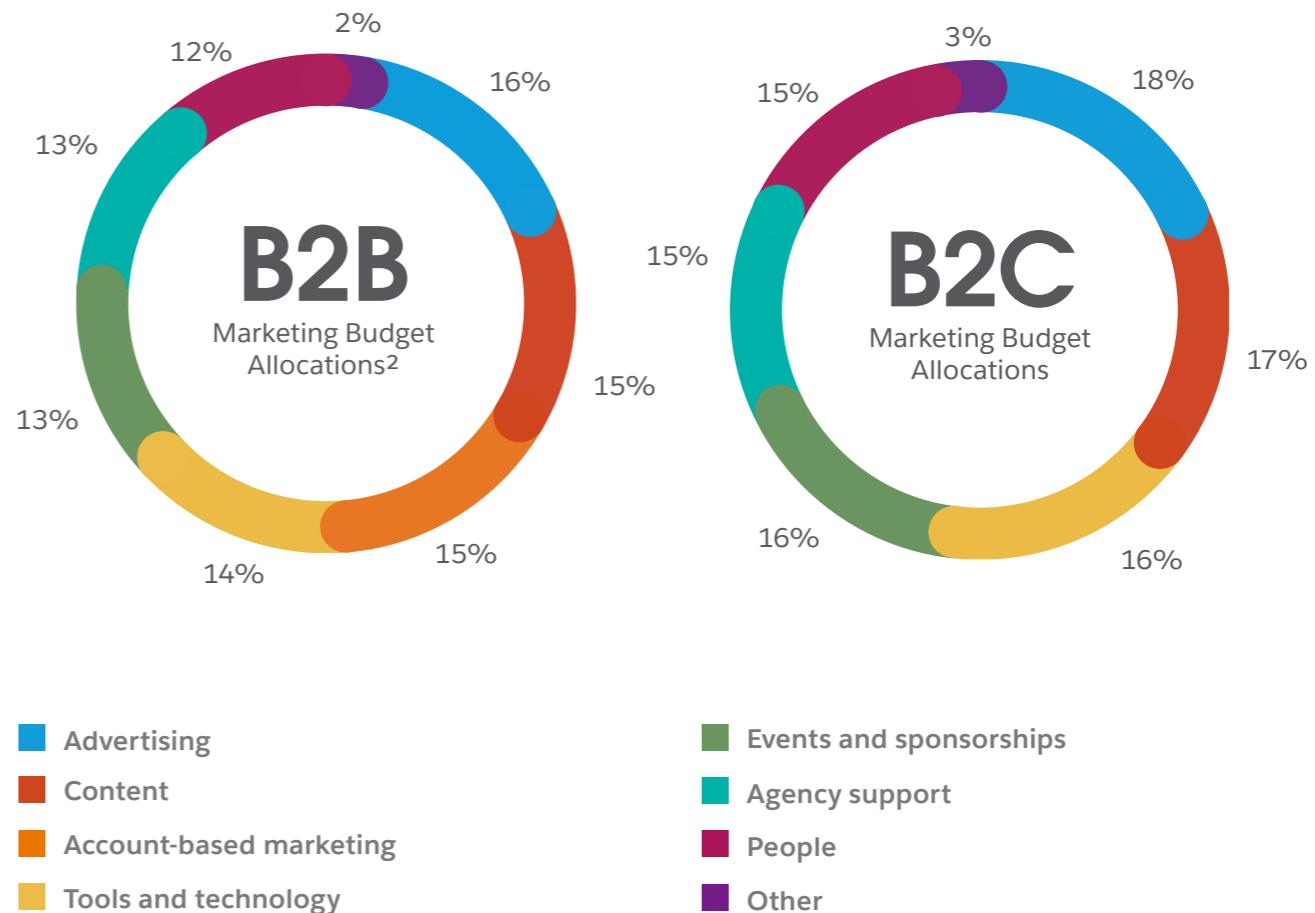
Marketers Focus on Driving Value Amidst Change

With many companies tightening their belts in anticipation of market headwinds, marketers are making strategic investments with finite budgets and resources. Disruptions caused by inflation and supply chain issues have made this task even harder. Advertising takes up the largest portion of global marketing budgets as teams strive to increase awareness in a landscape where customers have more choices than ever.

Marketing organizations are also investing in their people to attract and retain employees amid a job market in flux. **Seventy-one percent of marketers say that it's harder to retain employees than it was a year ago.¹**

B2B marketing organizations are allocating an average of 15% of their budget to account-based marketing (ABM), emphasizing the value of personalized messaging and engagement that has spread from B2C to B2B strategies.

Marketers Stretch Budgets Across Priorities



Base: CMOs and VPs of marketing

² Includes: B2B and B2B2C marketers

¹ See p. 27 of appendix

01

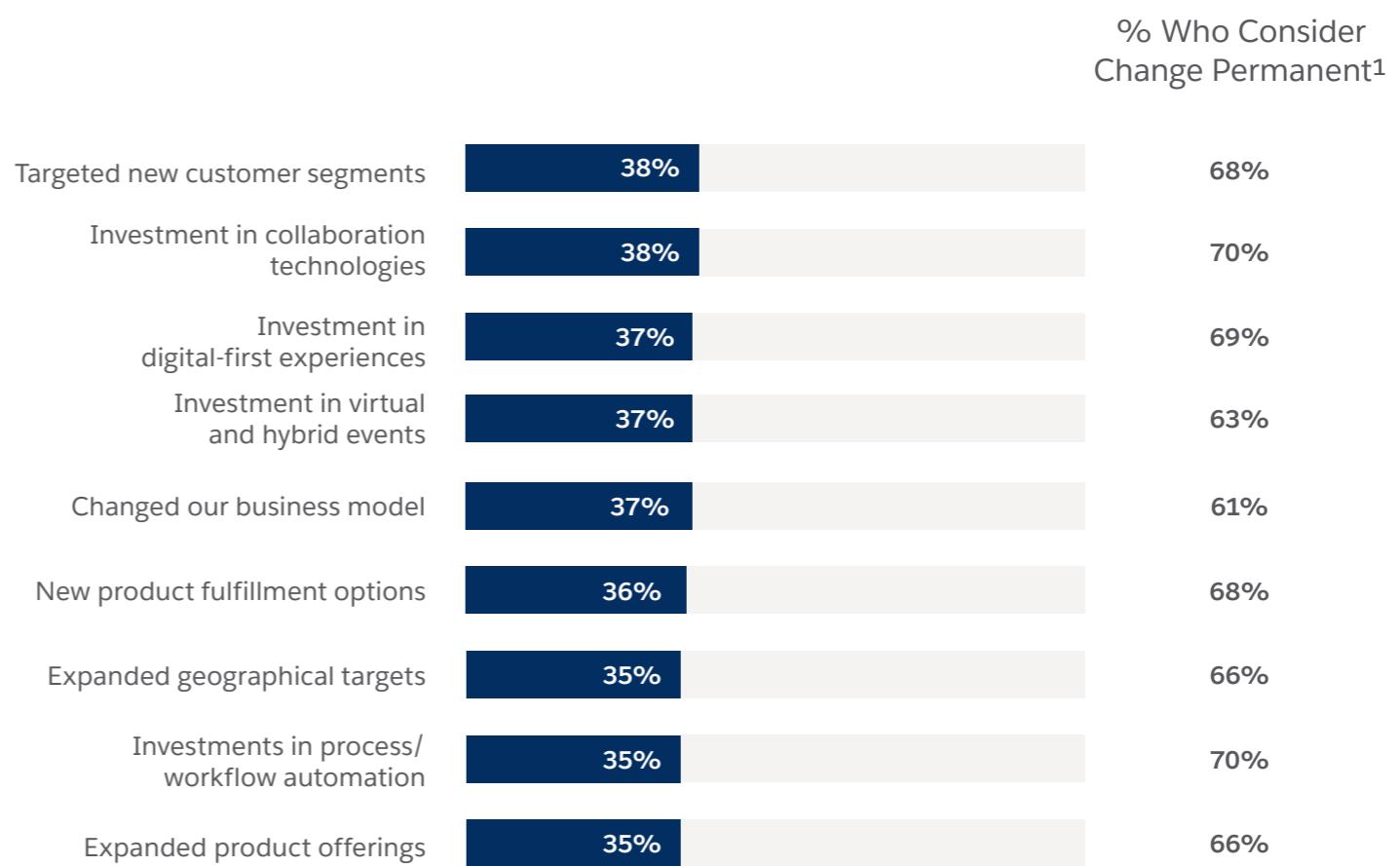
Marketers Focus on Driving Value Amidst Change

Marketers have transformed where and how they work, with many changes here to stay. No longer bound by geography or time zone, many marketers are finding success by unlocking new customer segments, investing in digital-first experiences, and hosting virtual and hybrid events.

The shift to distributed marketing teams has coincided with a flurry of investment in collaboration technology, with 70% of such investments viewed as permanent. Similarly, 70% of marketers who made investments in their process/workflow automation view this as a long-term strategy shift, underscoring the importance of boosting productivity and efficiency.

New Strategies Have Staying Power

Marketers Who Made the Following Strategy Shifts Since the Pandemic



¹ Base: Respondents who selected the corresponding strategy shifts



02

Innovative Channels and Tactics Redefine Customer Engagement

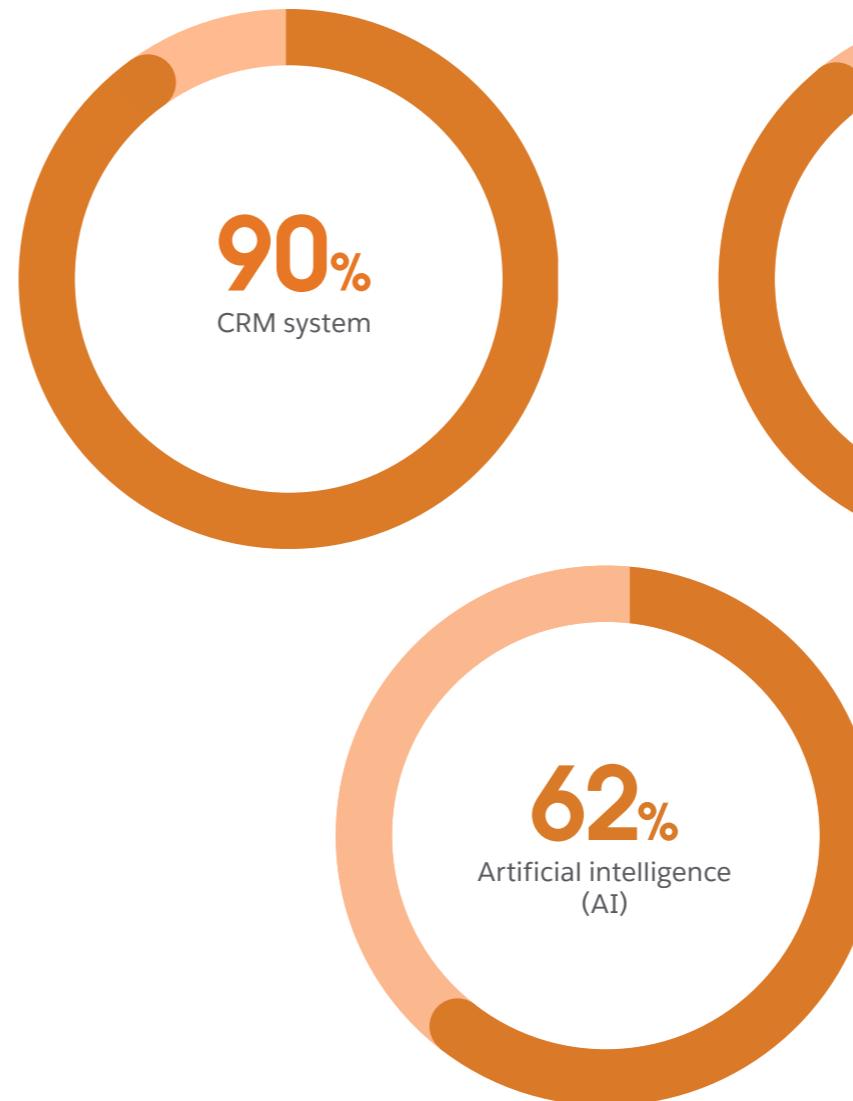
With data at the heart of today's digital enterprise, actionable insights have evolved from being a supporting player to a mission-critical component. Marketers are investing in tools and technologies that unify data efficiently, allowing brands to create unique customer profiles, execute automated campaigns, and infuse personalization at scale.

While customer relationship management (CRM) systems are particularly popular, marketers use a blend of tools to build relationships across the customer lifecycle. Eighty-nine percent of B2B and B2B2C marketers are using account-based marketing platforms, aiding teams in their pursuit to orchestrate targeted campaigns with their sales and service counterparts.

In the face of demand for data-driven, personalized, and scalable customer experiences, more than half of marketers say they've invested in the power of artificial intelligence (AI).

Marketers Lean on Tools to Capture and Unify Data

Marketing Organizations That Use the Following Technologies



¹ Base: B2B and B2B2C marketers

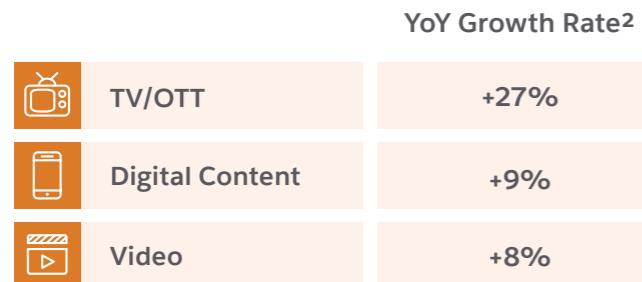


02

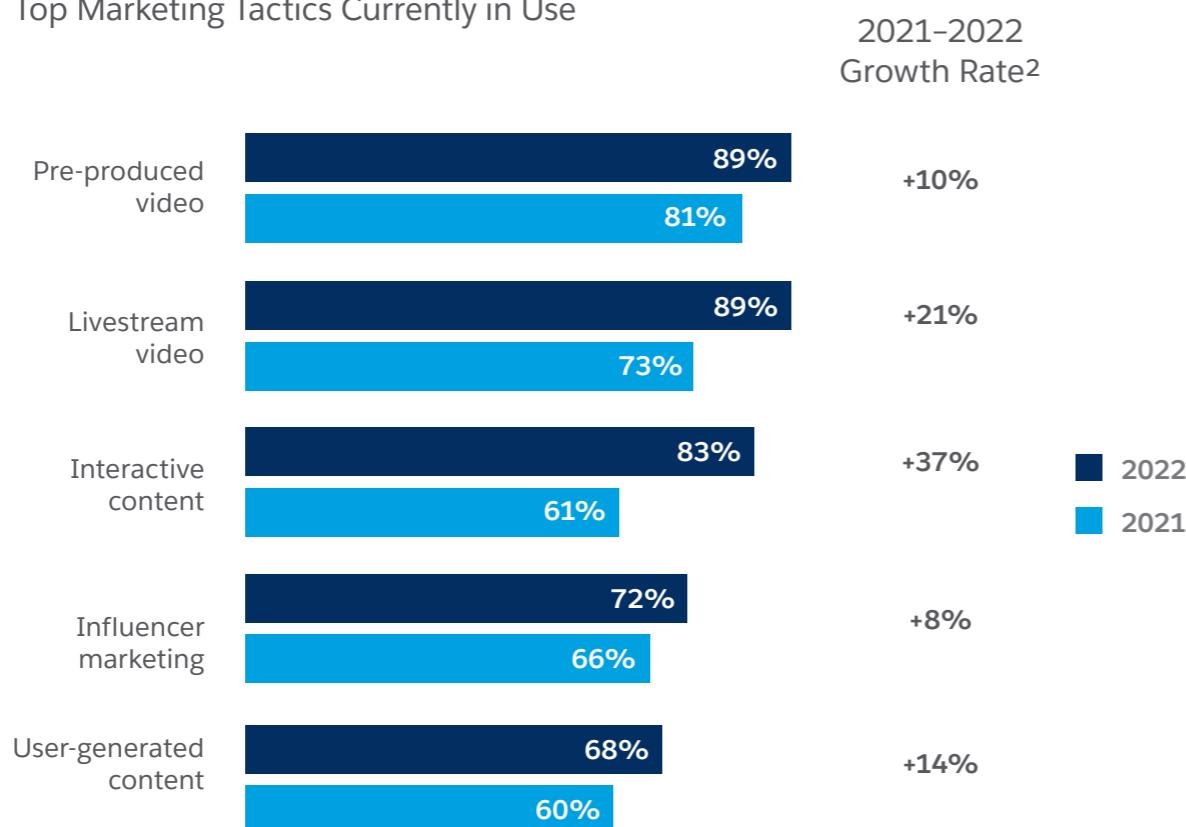
Innovative Channels and Tactics Redefine Customer Engagement

Video and Streaming Top the Charts

Channels with the Biggest Growth in Marketing Organization Adoption Over the Past Year



Top Marketing Tactics Currently in Use



Where customers lead, marketers follow, and marketers are increasingly experimenting with new digital channels to reach them. CMOs cite customer preferences and expectations as the #1 influence on digital strategy.

Marketers are testing the waters as streaming services now offer the ability to reach audiences with hyper-targeted ads, a nod to streaming's increasingly dominant position in the media landscape.¹ TV and over-the-top (OTT) streaming platforms saw the largest growth rates among channels used to reach prospects and customers.

Video continues to play an important role as both a channel and a tactic, with pre-produced video and livestream video both rising to the top of the marketing mix. With customers looking for more ways to engage online, marketers are increasingly tapping into a wide variety of interactive and user-generated content to meet demand.

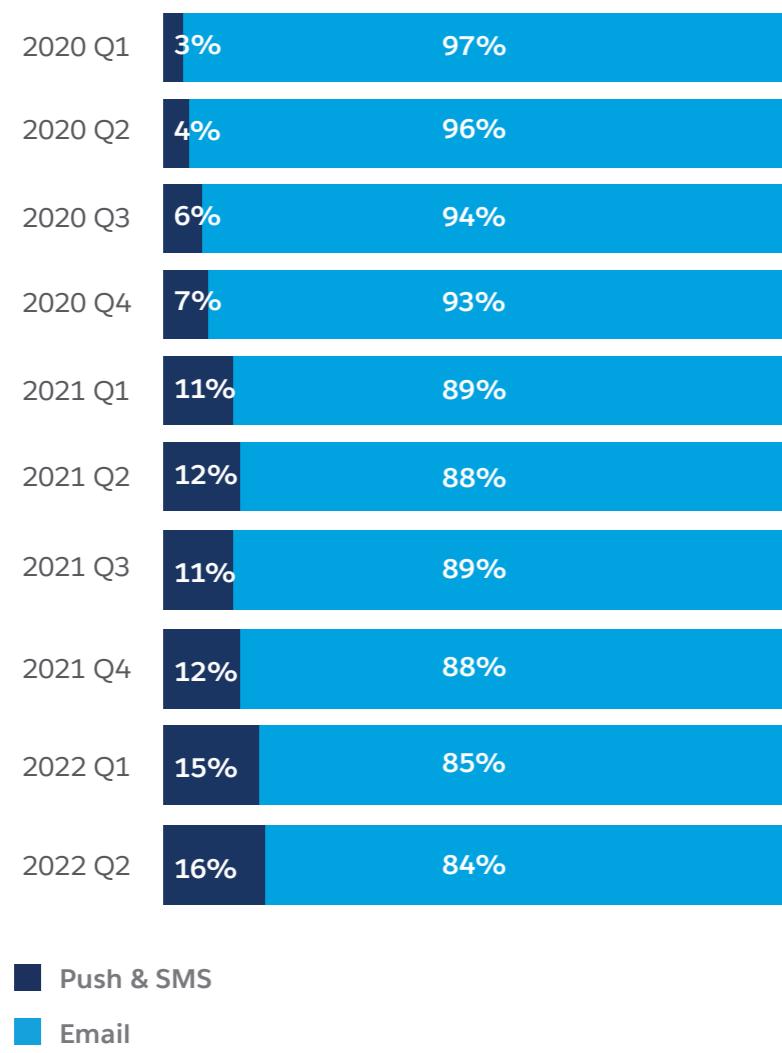
¹ "Streaming Claims Largest Piece of TV Viewing Pie in July," August 2022

² Growth rate = (2022-2021)/2021. Calculations are made from total numbers.

02

Innovative Channels and Tactics Redefine Customer Engagement

Email Remains Dominant Even as Other Channels Grow

Share of Message Sends by Type¹

In their pursuit of multichannel engagement, marketers are incorporating more push and mobile messaging alongside email campaigns.

However, email marketing still reigns supreme. According to Salesforce Marketing Cloud product data based on *trillions* of message sends, email use has increased year over year, accounting for 80% of all outbound messaging.¹ Moreover, **the number of outbound emails increased 15% in the last year**. When it comes to sheer volume of sends, email remains an effective digital channel. In fact, customers say that email is among their preferred channels to interact with brands, second only to the phone.²

Shifts in customer expectations continue to keep marketers on their toes. **Seventy-one percent of marketers say that meeting customer expectations is more difficult than a year ago.**



¹ "The Shopping Index," Salesforce, July 2022

² "State of the Connected Customer," Salesforce, May 2022

02

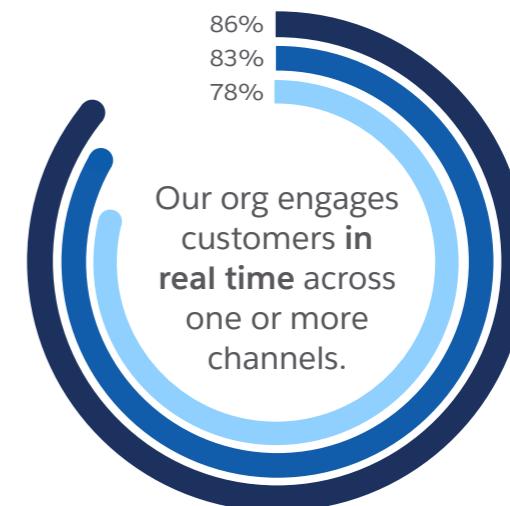
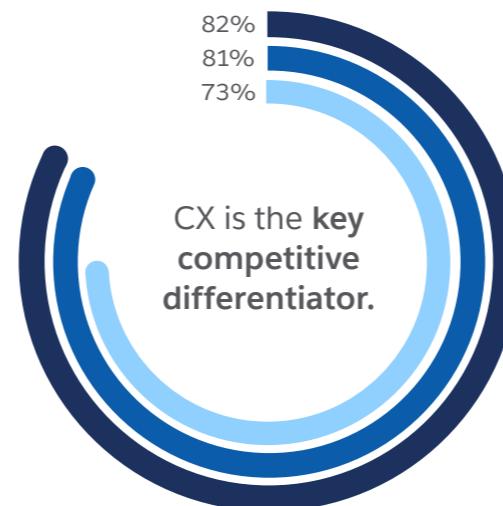
Innovative Channels and Tactics Redefine Customer Engagement

For marketers, personalization is not just about targeted messaging, but hyperpersonal understanding. According to recent research, **73% of customers expect companies to understand their unique needs and expectations.**¹ In response, 83% of marketers are using dynamic customer insights to adapt their strategies and optimize the impact of each interaction.

Regardless of how they approach their multichannel strategy, marketers are going the distance to deliver exceptional customer experiences – with high-performing marketers particularly taking this to heart. Eighty-two percent of high-performing marketers say customer experience is a key competitive differentiator, and feel confident that they're getting closer to cracking the code. Eighty-six percent of high-performing marketers say they engage customers in real time, a testament to their ability to unlock actionable data.

The Time for Real-Time Personalization Is Now

Marketers Who Agree with the Following Statements



- High performers
- Moderate performers
- Underperformers

¹ "State of the Connected Customer," Salesforce, May 2022





SPOTLIGHT: Marketers Explore New Frontiers

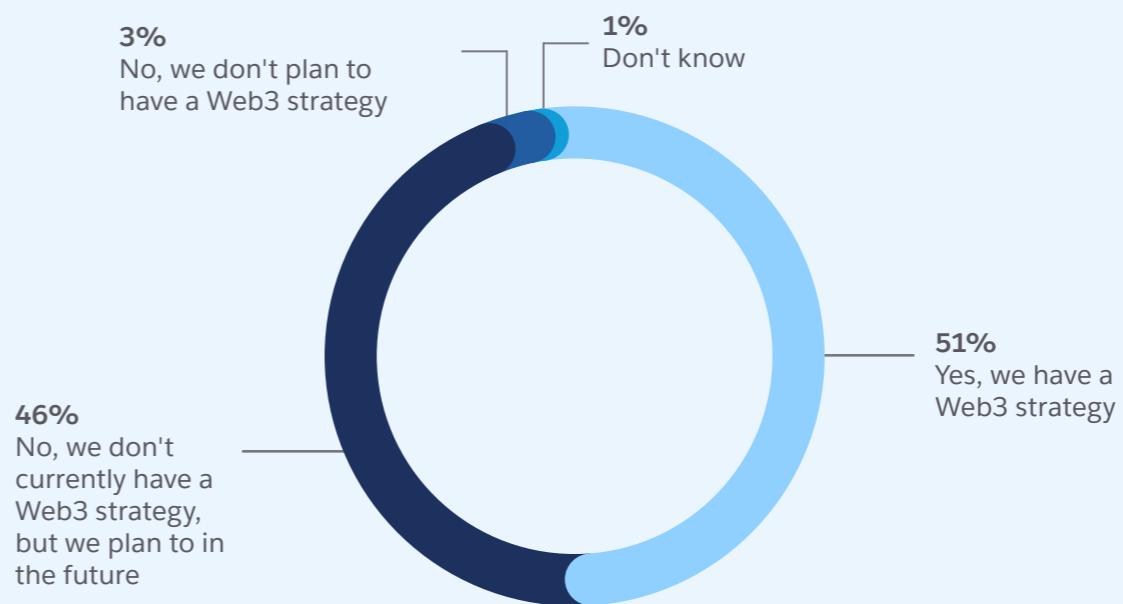
Digital transformation is now in marketers' DNA, and Web3 – a decentralized online ecosystem based on a blockchain – introduces a new chapter in marketing's evolution. Marketers rank "experimenting with new marketing strategies and tactics" as their second highest priority.

As decentralized, blockchain-based web trends take off, marketers are turning to creative approaches and the newest in digital tactics to maintain relevance.

Fifty-one percent of marketers say they have a strategy for Web3, with virtual products and VR and/or AR use cases being the most common. For the 46% of marketers who don't yet have a Web3 strategy, unique digital assets like cryptocurrency, the metaverse, and non-fungible tokens (NFTs) could present new opportunities for brands to collect first-party data as the end of the cookie nears.

Marketers Test Virtual Waters

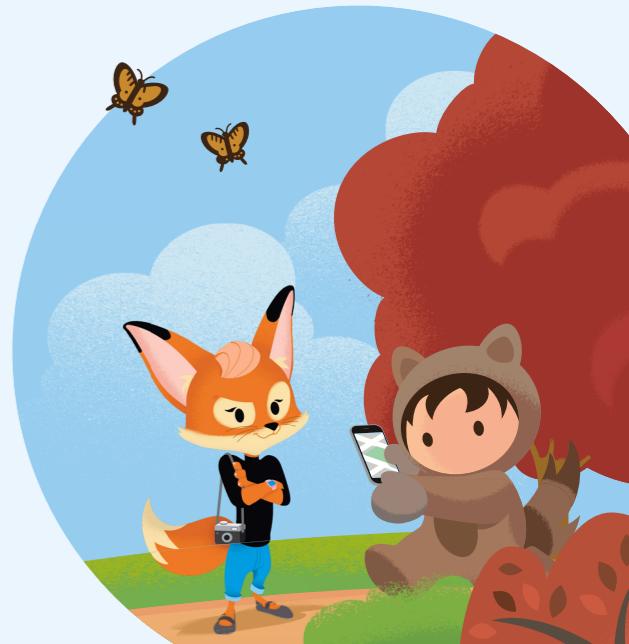
Marketing Organizations Who Describe Their Web3 Strategy as Follows



Top Elements in Web3 Strategy¹

- 1 **Virtual products**
- 2 **VR and/or AR**
- 3 **Cryptocurrency**

¹ Base: Marketing organizations with a Web3 strategy



03

Marketers Walk the "Personalization vs. Privacy" Tightrope

Marketers know that transformative, customer-centric engagement relies on data – and lots of it. Brands continue to anticipate an increase in the number of data sources used each year, projecting an average of 18 data sources in 2023.

But according to the 2021 Gartner® Cross-Functional Customer Data Survey, just 14% of organizations achieve a 360-degree view of their customer. Among those who have achieved it, 44% of respondents say their 360-degree view is located in a customer data platform.¹

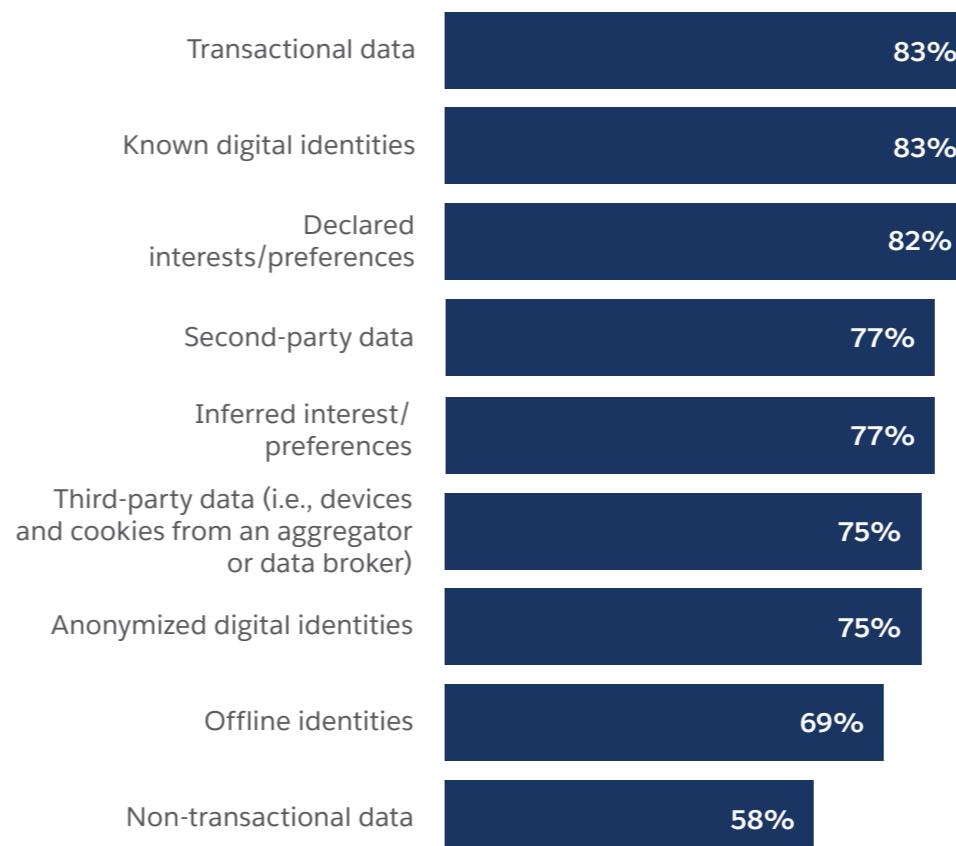
Despite deadlines to phase out third-party cookies being postponed yet again,² marketers are pivoting to zero- and first-party data. Still, **75% of marketers say they rely at least in part on third-party data.** While not all third-party data is cookie-related, marketers will need to reconcile this strategy with looming changes in privacy regulations.

¹ “Market Guide for Customer Data Platforms,” Gartner, Benjamin Bloom, Lizzy Foo Kune, March 2022. GARTNER is a registered trademark and service mark of Gartner, Inc., and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

² “Google Delays Cookie-Cutting to 2024,” CNN, July 2022

Marketers Diversify Data Sources

Data Sources Used by Marketing Organizations



Average Number of Data Sources Used



03

Marketers Walk the "Personalization vs. Privacy" Tightrope

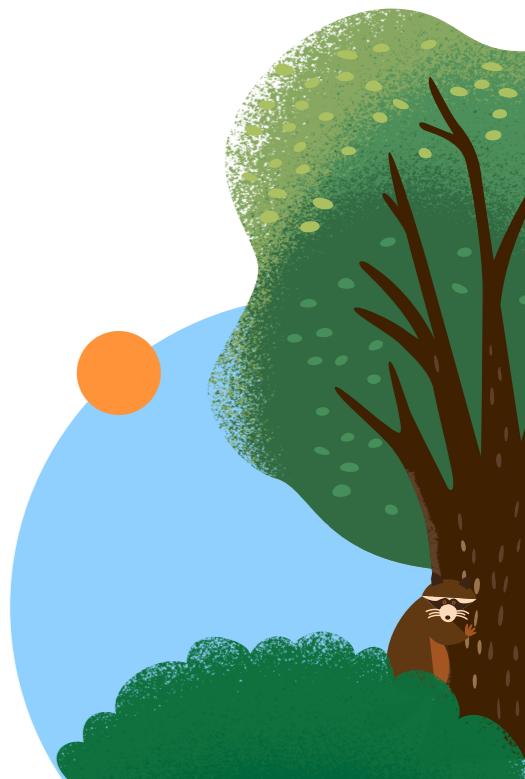
Over the past few years, changes in data privacy policies and regulations have had a significant effect on digital analytics. From the European Union's General Data Protection Regulation (GDPR) to Apple's privacy policy update and everything in between, understanding how to maintain compliance while still serving up personalization has proved to be an ongoing challenge.

Although 75% of marketers are still investing in third-party data, 68% say they have managed to fully define their strategy to shift away from these sources. Strategies such as providing information-sharing incentives for customers can help bridge the gap by enriching customer data profiles.

While marketers understand that proper privacy and security measures are essential to building and maintaining customer trust, we may have reached a tipping point in terms of how far marketers are willing to go. Only 51% of marketers say they go beyond regulations and industry standards to protect customer privacy, down from 61% last year.

Marketers Gear Up for a Cookieless Future

Actions Taken to Prepare for Privacy Changes



03

Marketers Walk the "Personalization vs. Privacy" Tightrope

With data in one hand and innovation in the other, it's no wonder marketers continue to embrace the use of AI to improve customer experiences and operate more efficiently. Indeed, three of the top four AI use cases are related to automation, highlighting the importance of scaling up speed and effectiveness with existing resources.

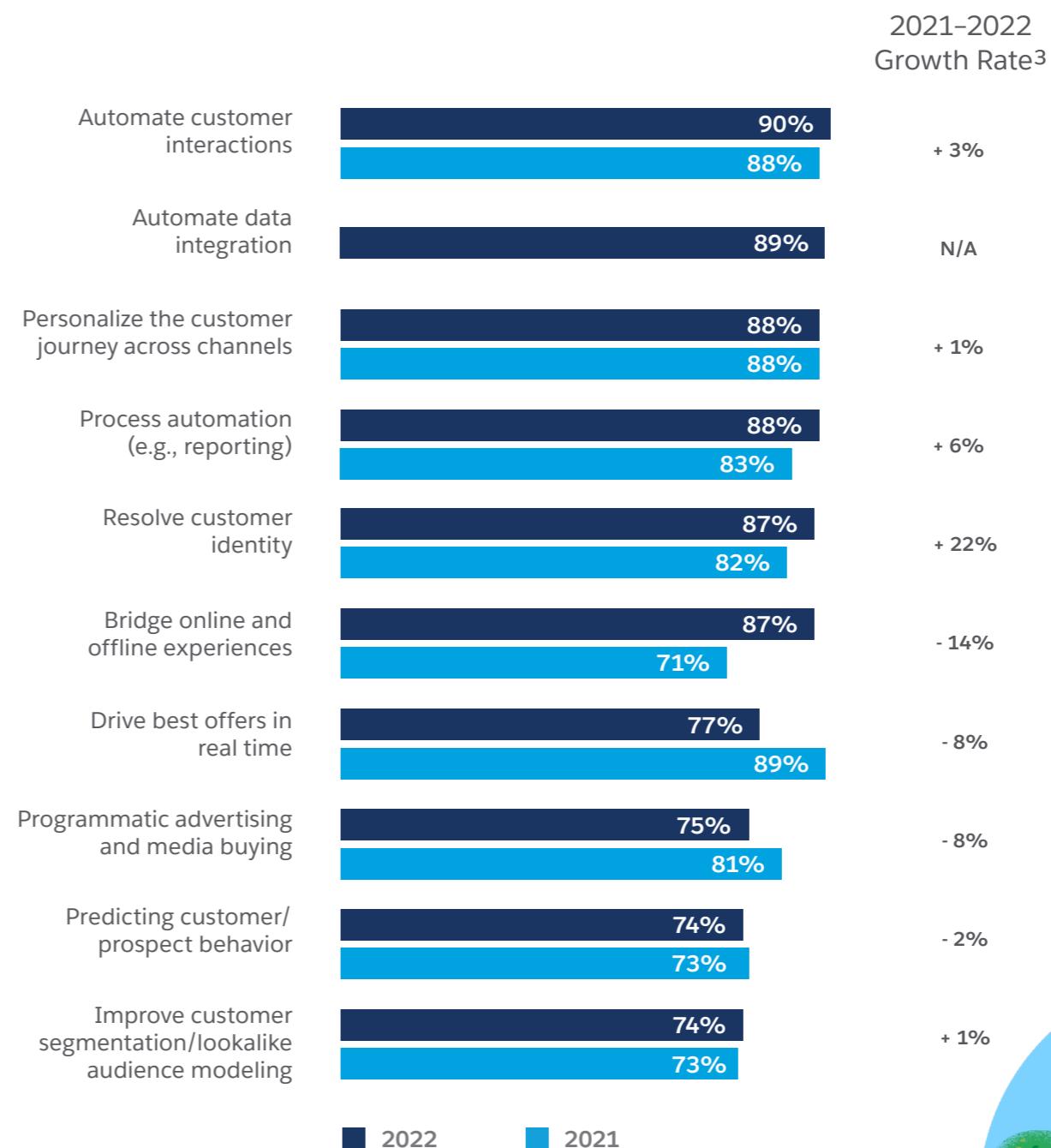
Sixty-eight percent of marketers say they have a fully defined AI strategy, up from 60% in 2021 and 57% in 2020.

Marketing organizations are well aware of the benefits and continue to invest in AI applications that augment the customer journey – like resolving customer identities and driving next-best offers in real time.

While customers are more online now than ever before, 43% still say they prefer non-digital channels.¹ This explains a prominent AI use case for marketers: bridging online and offline experiences.

AI Is Primarily Used to Scale Efforts

Ways in Which Marketing Organizations Use AI²



² Base: Marketers who use AI

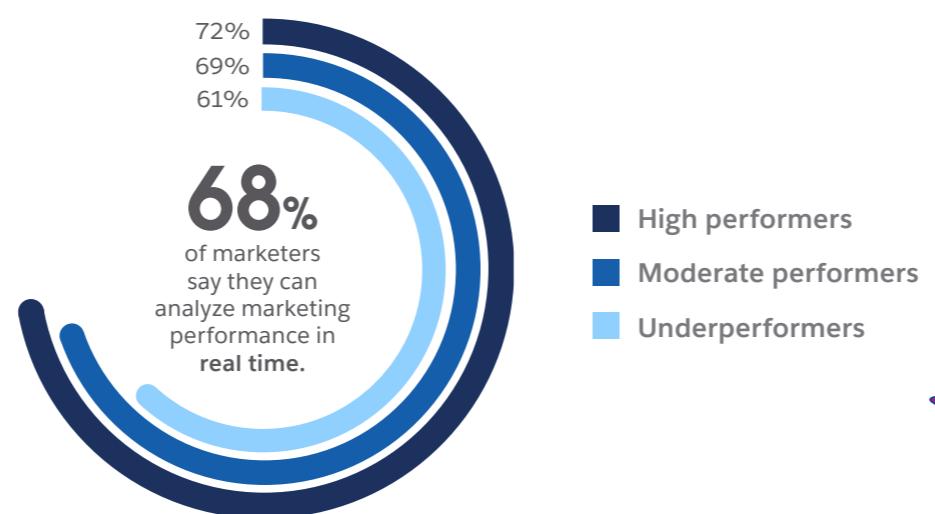
³ Growth rate = (2022-2021)/2021. Calculations are made from total numbers.

KPIs Shift as Marketers Adopt Real-Time Intelligence

Marketing without metrics is like driving with your eyes closed. In order to understand if their efforts are moving the needle, marketers are investing in analytics capabilities to get an accurate view of the impact of their messages, campaigns, and marketing spend. And the faster they can unlock these insights, the quicker they can respond to customer needs and make informed decisions to drive business growth.

Compared to 61% of underperforming marketers, nearly three-quarters (72%) of high-performing marketers are able to analyze marketing performance in real time, giving them an advantage when it comes to responding to and optimizing campaign performance. Unfortunately, 33% of marketers still say their marketing attribution is a manual process, a needle that has barely moved from 34% in 2020.

Attribution Accelerates to Real Time



04

KPIs Shift as Marketers Adopt Real-Time Intelligence

For organizations hoping to create efficiencies and maximize value, identifying the right metrics to track is a business imperative. As marketing budgets undergo strict scrutiny, analytics provide leaders with the insight they need to optimize spend and lower acquisition costs, further proving the value of marketing.

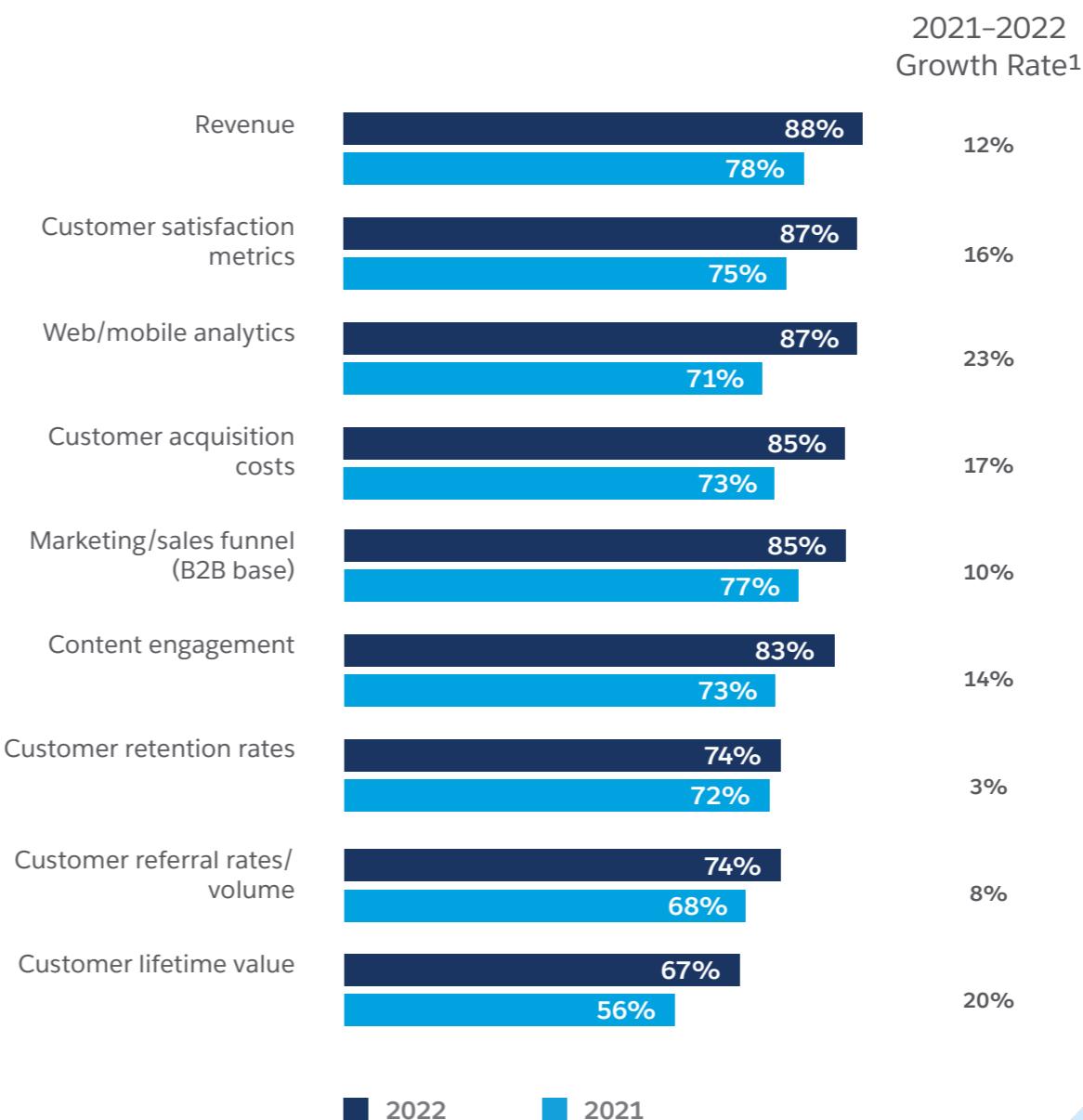
Analytics abound. Marketers now track a whole suite of metrics – like revenue and customer satisfaction year over year.

Personalization and customer touchpoints are also a focus for marketers. More teams than ever before are tracking web/mobile analytics, content engagement, and customer lifetime value.

But marketers cite measuring marketing ROI/attribution as their #2 challenge, meaning there's still work to be done when it comes to simplifying the reporting process.

Marketers Track More KPIs

Marketing Organizations That Track the Following Metrics



¹ Growth rate = (2022-2021)/2021. Calculations are made from total numbers.





SPOTLIGHT: B2B Marketers Drive Cross-Channel Experiences with ABM

Eighty percent of marketers say their organization leads customer experience initiatives across the business, coordinating efforts across marketing, sales, service, and commerce. To orchestrate these cross-functional programs, high-performing marketers, in particular, are tapping into valuable cross-departmental metrics to glean deeper insights into the customer experience.

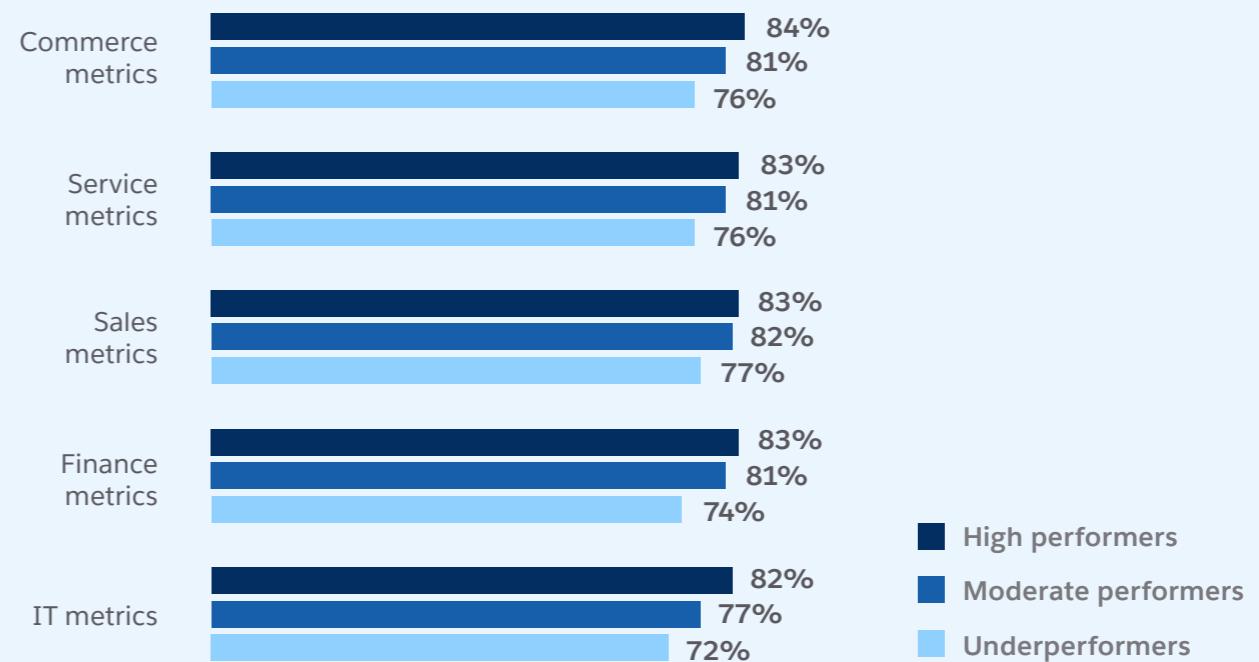
And because B2B customers expect a seamless and personalized journey across departments, 89% of B2B marketers are using an account-based marketing (ABM) platform to deliver a unified end-to-end experience.

However, successful ABM campaigns require complex, holistic data-driven marketing strategies that marketers have yet to fully establish. **Thirty-one percent of B2B marketers say that sharing a unified view of customer data across business units is a challenge, and 62% of business buyers say it generally feels like they're communicating with separate departments, not one company.¹**

Marketers Struggle to Get a Unified View



Marketers Who Track the Following Cross-Departmental Metrics



¹ "State of the Connected Customer," Salesforce, May 2022

Distributed Teams Unite with Collaboration Technology

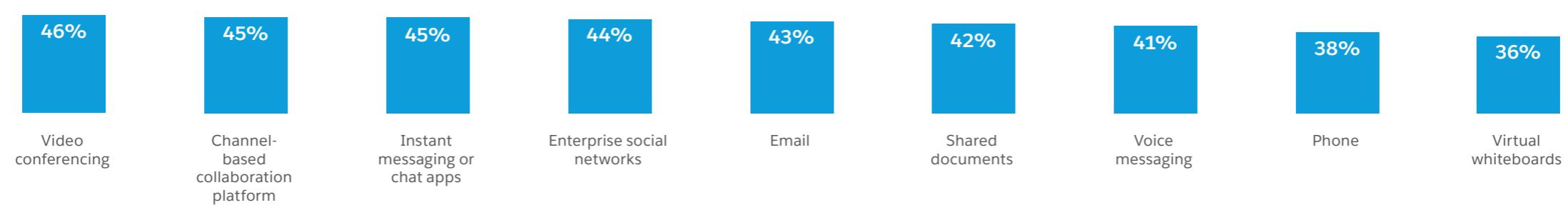
With rising customer expectations, challenges managing data, and changing KPIs, marketers have their work cut out for them. And with the pace of change in today's world, the speed and ease of collaboration can make – or break – a marketing team's success.

However, the rapid shift to virtual collaboration hasn't been easy. **Sixty-nine percent of marketers say it's harder to collaborate now than before the pandemic.**

To help, marketers have adopted an average of four collaboration technologies to facilitate digital-first collaboration and unify their global marketing teams, spread across a variety of communication tools like video conferencing, collaboration platforms, and chat apps.

Distributed Teams Rely on a Variety of Communication Tools

Marketers Who Use the Following Collaboration Technologies

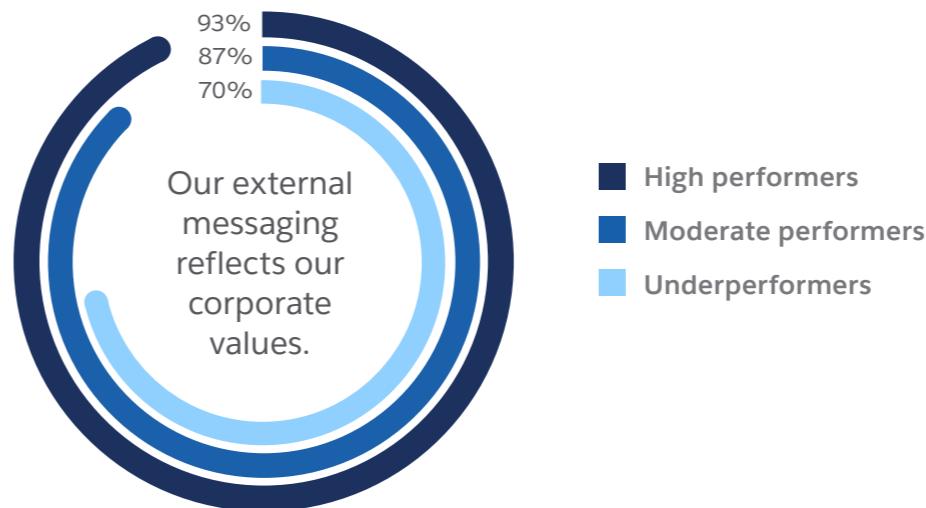


06

Marketers Lead with Values

More than ever before, customers are looking to buy from companies that clearly state their values and prioritize ethical, social, and environmental objectives. **Sixty-six percent of customers have stopped buying from a company whose values didn't align with theirs.¹** With 88% of customers saying they expect to see brands demonstrate clear and strong values, marketers recognize a unique opportunity to lead with a values-based message. In fact, 93% of high-performing marketers say their external messaging reflects their corporate values compared to 70% of their underperforming competition.

Marketing Messages Can Be a Beacon for Values



¹ "State of the Connected Customer," Salesforce, May 2022



CASE STUDY: Salesforce Marketing Team Bets on Values

What do Salesforce, Matthew McConaughey, and Team USA at the Olympic Winter Games 2022 have in common? Each played a critical role in engaging global audiences through a values-based marketing campaign, #TeamEarth.

Salesforce has grown and expanded quickly over the years, amassing a broad product portfolio. This growth created an opportunity to educate its audiences on what the company is built on: its values.

Out of this, the #TeamEarth campaign was born.

But this new campaign wasn't without risk. Unlike most of what the marketing team had previously created, the #TeamEarth campaign wasn't about selling Salesforce products. Instead, the goal was to inspire companies to use the power of business to create a better, more equitable, and sustainable future.

Launch

To launch the campaign, Salesforce:

- Created strategic brand and media partnerships
- Invested in linear TV and OTT video advertising
- Ran a **values-based spot** during high profile sporting events
- Partnered with Matthew McConaughey as a brand advisor



Results

The team has already seen some early wins:

- A 30% increase in organic search of the brand during the campaign's first few months
- 5x the social conversations compared to Salesforce's previous Team USA campaign for Tokyo
- 80% increase in employee pride in working at Salesforce after seeing the campaign
- Early increases in unaided awareness in a brand health survey

Looking Ahead

So what's next for this campaign?

Salesforce is currently working on a second iteration, focused on expanding its reach and driving more clarity on how business decision makers can take action. Salesforce plans to continue leading with values, providing opportunity for all stakeholders to join in.

Team Earth
salesforce



LOOK AHEAD: Building a Future-Proof Marketing Organization

Against a backdrop of rapidly-evolving technology, rising customer expectations, and a shifting labor market, it's crucial to nurture a skilled talent pool of marketers. However, **talent gaps remain a top challenge for one in three marketers.**

Looking ahead, marketers see improving skills in content marketing, campaign strategy, and data analytics as crucial to success in the next 2 years. This provides marketing leaders with a clear direction –and opportunity – to upskill their teams, retain their top talent, and create future-forward career paths.

Marketers Seek to Uplevel Skills

Most Important Skills to Improve Over Next 2 Years

- 1 **Content marketing**
- 2 **Campaign strategy**
- 3 **Creativity**
- 4 **Data Analytics**
- 5 **Communication**



Appendix



Top Priorities by Role

CMO

- 1 Modernizing tools and technologies
- 2 Building/retaining trust with customers
- 3 Experimenting with new marketing strategies/tactics

VP, SVP, EVP, or Equivalent

- 1 Modernizing tools and technologies
- 2 Improving our use of tools and technologies
- 3 Improving collaboration

Team Lead, Director, or Equivalent

- 1 Improving our use of tools and technologies
- 2 Modernizing tools and technologies
- 3 Experimenting with new marketing strategies/tactics

Biggest Influences on Digital Strategy by Role

CMO

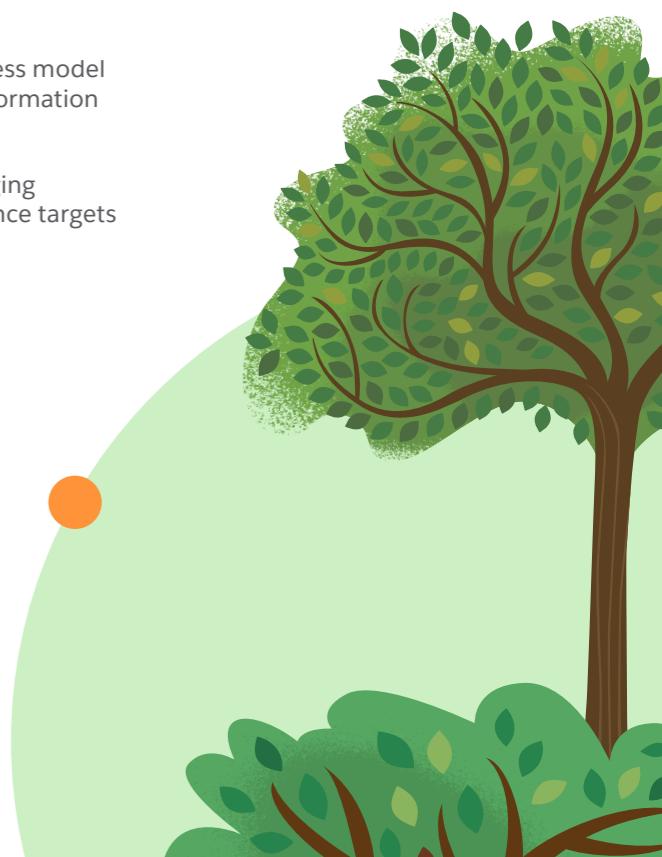
- 1 Customer preferences and expectations
- 2 Competitive pressure
- 3 Budget

VP, SVP, EVP, or Equivalent

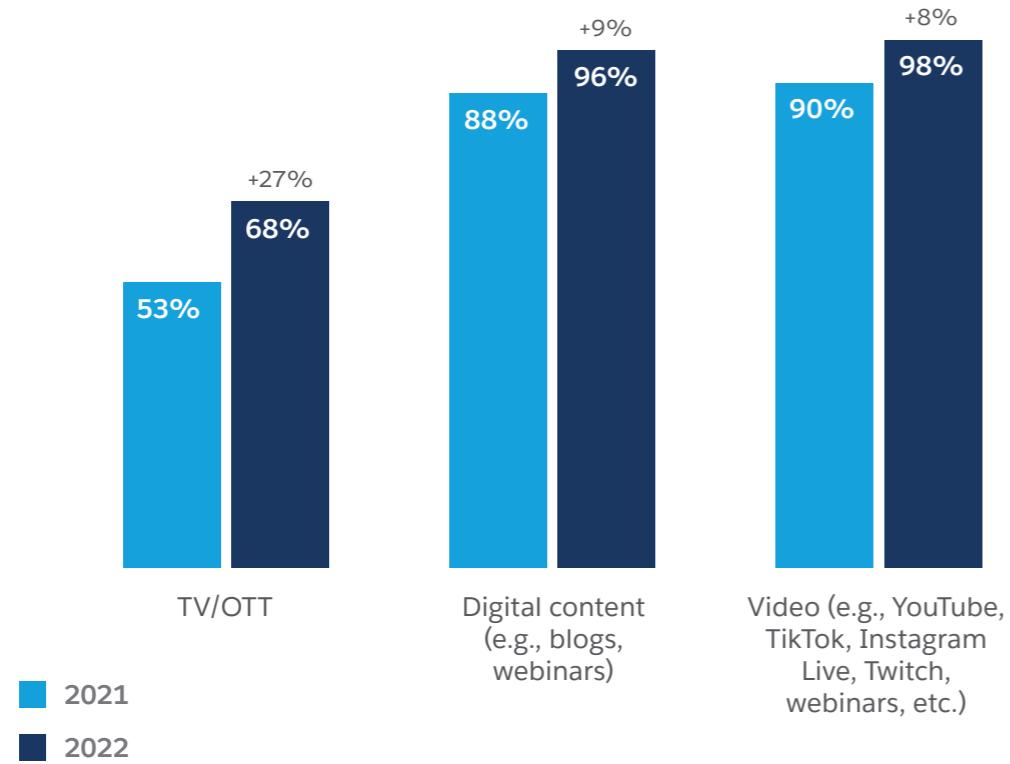
- 1 Customer preferences and expectations
- 2 Technology
- 3 Budget

Team Lead, Director, or Equivalent

- 1 Customer preferences and expectations
- 2 Business model transformation
- 3 Changing audience targets



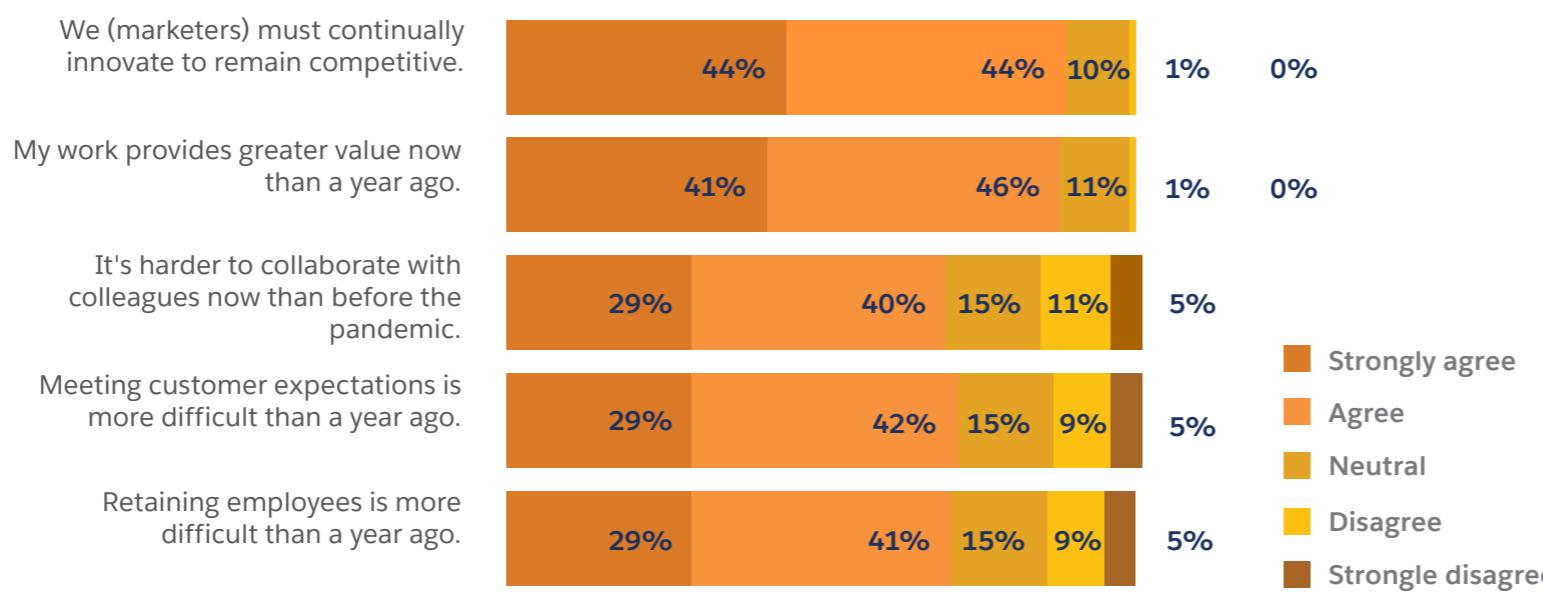
Channels with Biggest Jump in Adoption in the Last Year¹



Marketers Who Agree with the Following Statements

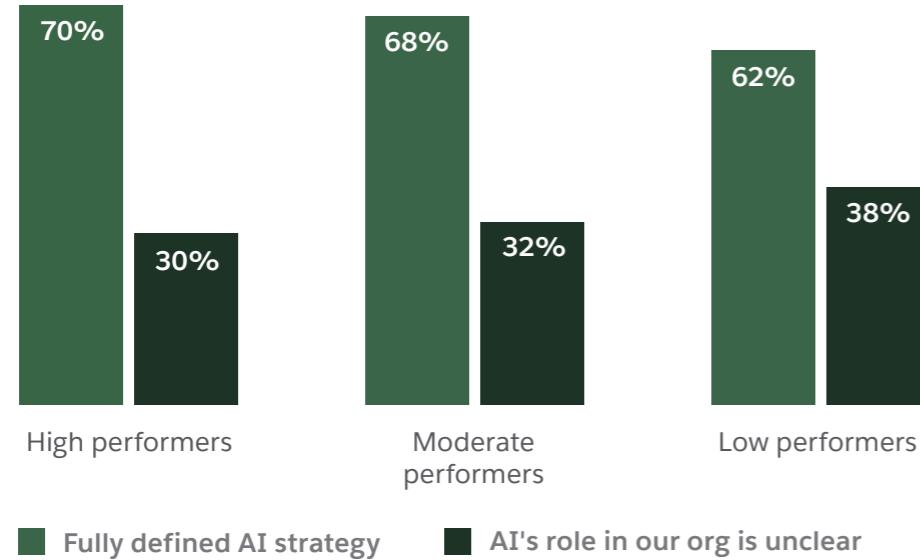


Degree to Which Marketers Who Agree with the Following

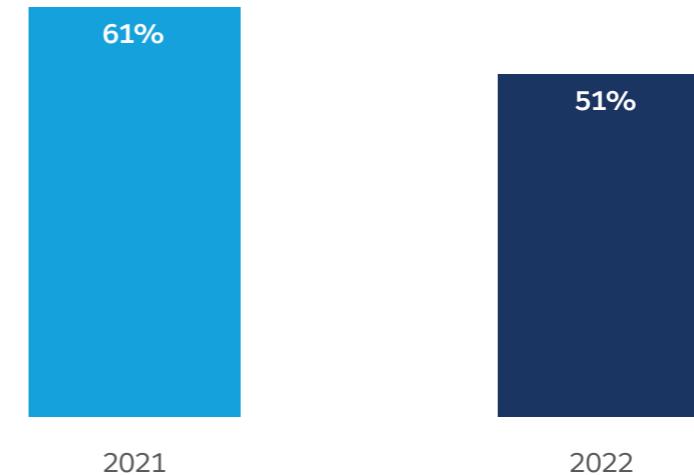


¹ Growth rate = (2022–2021)/2021. Calculations are made from total numbers.

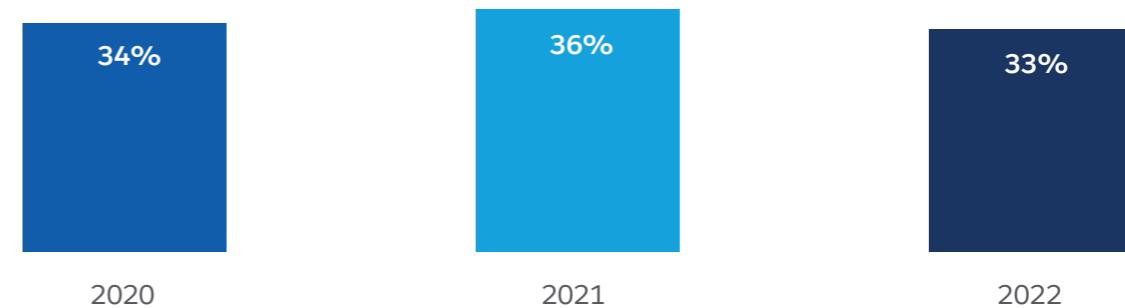
AI Maturity, by Performance Level



Marketers Who Say They Go Beyond Regulations and Industry Standards to Protect Customer Privacy, YoY



Marketers Who Say Their Marketing Attribution Is Manual, YoY



Survey Demographics



Survey Demographics

Country

Argentina	3%
Australia	4%
Belgium	2%
Brazil	4%
Canada	4%
Chile	2%
Colombia	2%
Denmark	<1%
Finland	1%
France	4%
Germany	4%
Hong Kong	2%
India	4%
Indonesia	4%
Israel	1%
Italy	4%
Japan	4%
Malaysia	3%
Mexico	3%
Netherlands	3%
New Zealand	1%
Norway	<1%
Philippines	4%
Poland	3%
Portugal	2%
Singapore	3%
South Africa	3%
South Korea	4%

Industry

Architecture, engineering, and construction	2%
Automotive	6%
Communications	5%
Consumer goods	12%
Energy and utilities	3%
Financial services	8%
Government	2%
Healthcare (not including life sciences and biotechnology)	6%
Hospitality (e.g., lodging, restaurants, and food service)	7%
Manufacturing	6%
Media and entertainment	4%
Nonprofit	3%
Professional and business services	2%
Retail	13%
Supply chain and logistics	3%

Technology (e.g., semiconductor, components, hardware, software, infrastructure)	5%
Travel	3%

Business Model

Business-to-business (B2B)	25%
Business-to-consumer (B2C)	50%
Business-to-business-to-consumer (B2B2C)	25%

Seniority

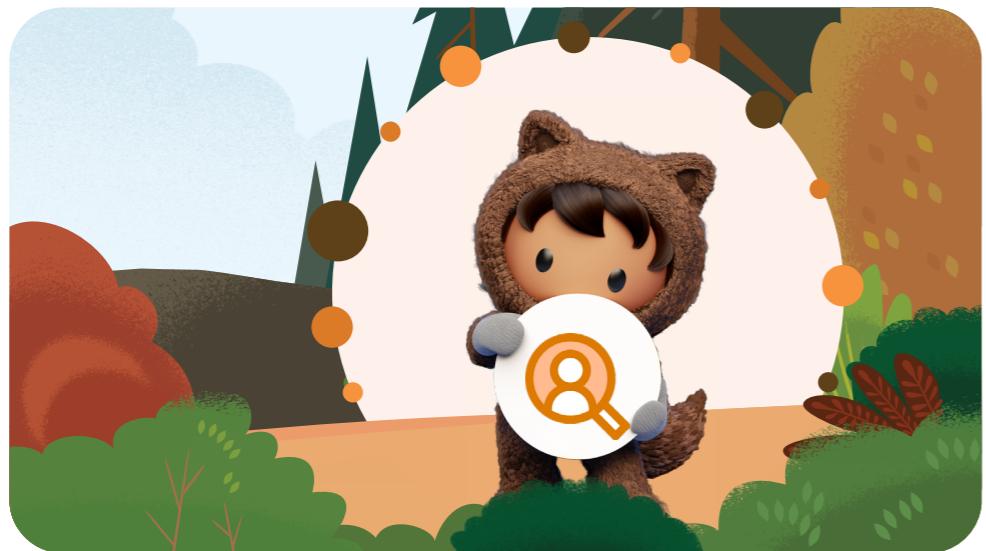
CMO	10%
VP, SVP, EVP, or equivalent	17%
Team leader, supervisor, manager, director, or equivalent	72%

Company Size

SMB (21–100 employees)	30%
MM (101–3,500 employees)	50%
ENT (over 3,500 employees)	20%



Want to Learn More?



Marketing Cloud Overview

Explore the latest in marketing with Salesforce.

[Learn more](#)

Salesforce Genie Overview Page

Learn more about our real-time platform for customer magic.

[Learn more](#)

Salesforce+

Get inspired with free access to award-winning content for business professionals.

[Watch now](#)



The information provided in this report is strictly for the convenience of our customers and is for general informational purposes only. Publication by Salesforce, Inc., does not constitute an endorsement. Salesforce does not warrant the accuracy or completeness of any information, text, graphics, links, or other items contained within this guide. Salesforce does not guarantee you will achieve any specific results if you follow any advice in the report. It may be advisable for you to consult with a professional such as a lawyer, accountant, architect, business advisor, or professional engineer to get specific advice that applies to your specific situation.