

The **CMO** Survey

since 2008



UK Topline Report

FEBRUARY 2021



London
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The State of UK Marketing: Brexit, COVID-19 and Digital Transformation

The Inaugural Edition of The CMO Survey UK, February 2021

One year ago, we were preparing for Brexit—with 50% of marketers pessimistic about its impact—but nothing could have prepared us for the COVID-19 pandemic. Amidst the tragic human loss and suffering, we have witnessed a year full of transformation and challenge for the field of marketing. Digital transformation was thrust upon companies as they sought new ways to reach and engage with now remote customers. This necessity inspired the rewiring of go-to-market models for 48% of respondents' companies as well as the introduction of powerful new digital interfaces. Marketing, as the function and process responsible for managing customers and the firm-marketplace interface, was placed at the center of many corporate initiatives—73% of UK marketing leaders responded that the role of marketing in their companies increased in importance during the last year—yet UK marketing budgets were down by 17% and marketing headcount by more than 3%.

This Inaugural Edition of The CMO Survey UK provides the marketing profession with an understanding of how marketing activities, spending, jobs, and performance have been influenced by the upheavals of the past year. This Edition offers forward-looking insights regarding digital investments, shifting customer behavior, and managing growth during these uncertain times. This pilot UK Edition also provides a comparison to the study of U.S. marketing leaders that has been running bi-annually since 2008 (see U.S. results at <https://cmosurvey.org/results/>).

We hope these benchmarks will be useful to you and your company as you navigate this historic period. Special thanks to the marketing leaders that gave their time and good will to make these insights possible.

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The State of UK Marketing: Brexit, COVID-19 and Digital Transformation

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Survey Sample

126 marketing leaders at UK for-profit companies, 96.2% of respondents are VP-level or above.

Survey Administration

The survey was in field from January 7-31, 2021. It was administered via email with follow-up reminders.

Survey Reports

- The Topline Report offers an aggregate view of survey results
- The Firm and Industry Breakout Report displays survey results by sectors, size, and sales

Overview of The CMO Survey®

Mission: To collect and disseminate the opinions of top marketers in order to predict the future of markets, track marketing excellence, and improve the value of marketing in firms and society.

Administration: Founded in August 2008, The CMO Survey is administered in the U.S. twice a year. 2021 saw the inaugural UK Edition. The survey is an objective source of information about marketing and a non-commercial service dedicated to improving the field of marketing.

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Table of Contents

Topic 1: Macroeconomic Forecasts

- 1 Are you more or less optimistic about the UK economy compared to last quarter?
- 2 Rate your optimism about the UK economy on a scale from 0-100 with 0 being the least optimistic.

Topic 2: Customer Behavior¹

- 3 Rank your customers' top three priorities (1, 2, 3) over the next 12 months.
- 4 If you were to insert "strong customer experience" into the above list of five factors, what rank would you give it?
- 5 Which customer activities increased, decreased, or had no change for your company in the prior 12 months?
- 6 How much do customers trust your brand?

Topic 3: Managing Marketing During the Covid-19 Pandemic

- 7 How has the role of marketing in your company changed during the last year?
- 8 What marketing objectives have you been focused on during the pandemic?
- 9 Considering marketing opportunities, what activities have you shifted resources to during the pandemic?
- 10 How well did the marketing strategies used during the Covid-19 pandemic work in the short-term?
- 11 Taking your best guess, to what degree do you think the marketing strategies used during the Covid-19 pandemic will be important opportunities for your company in the long-term?
- 12 How much time do you spend managing the present versus preparing for the future of marketing in your company?

Topic 4: Marketing Leadership

- 13 How well aligned are marketing and sales leaders in your company on goals, strategies, and tools/data?
- 14 How well aligned are marketing and finance leaders in your company on goals, strategies, and tools/data?
- 15 Relative to a year ago, rate the success your company has had in improving the DE&I of its marketing activities.
- 16 By what percent has marketing spending on DE&I changed in the last year?
- 17 Rate the degree to which your company has developed an inclusive approach to marketing decision making, meaning you have established steps to review and/or evaluate marketing decisions from a DE&I perspective.
- 18 Check all of the actions your company is likely to make in order to reduce the negative impact of its marketing-related activities on the ecological environment.
- 19 What factors interfere with your company doing more in the area of marketing sustainability?
- 20 Do you believe it is appropriate for your brand to take a stance on politically-charged issues?
- 21 Rate the extent to which you believe your company is transparent with customers about the following topics.

Topic 5: Managing Growth

- 22 Allocate 100 points to reflect how your firm will grow during the prior 12 months.
- 23 Allocate 100 points to reflect how your firm will grow during the next 12 months.
- 24 What percent of your marketing budget do you spend on domestic markets?
- 25 What percentage of your firm's sales is domestic?
- 26 What percentage of your firm's sales is through the Internet?

Topic 6: Marketing Spending and Performance

- 27 Marketing expenses account for what percent of your firm's overall budget?
- 28 Marketing expenses account for what percent of your firm's revenues?
- 29 By what percent has your overall marketing spending changed in the prior 12 months?
- 30 What is your company's percentage change in overall marketing spending during the next 12 months in each area?
- 31 What percent of your marketing budget is spent on initiatives related to customer experience?

¹ These questions asked respondents to focus on their largest UK sales revenue market.

- [32](#) What percent of your marketing budget was spent on initiative related to customer experience one year ago?
- [33](#) Rate your firm's performance during the prior 12 months: Sales revenue
- [34](#) Rate your firm's performance during the prior 12 months: Profits
- [35](#) Rate your firm's performance during the prior 12 months: Customer acquisition
- [36](#) Rate your firm's performance during the prior 12 months: Customer retention
- [37](#) Overall, how would you rate your company's marketing excellence?

Topic 7: Digital, Mobile, and Social Media Marketing

- [38](#) To what degree has the use of digital marketing contributed to your company's performance during the last year?
- [39](#) By what percent has the contribution of digital marketing to your company's performance changed in the last year?
- [40](#) Thinking about your company's digital marketing knowledge and skills, rate your company's current expertise level.
- [41](#) Rate your company's digital marketing expertise level one year ago.
- [42](#) What investments did your company make to improve the performance of your digital marketing activities over the last year?
- [43](#) What percent of your marketing budget do you spend on mobile activities? Now, 12 months, 5 years
- [44](#) To what degree has the use of mobile marketing contributed to your company's performance during the last year?
- [45](#) By what percent has the contribution of mobile marketing to your company's performance changed in the last year?
- [46](#) What percent of your marketing budget do you spend on social media? Now, 12 months, 5 years
- [47](#) To what degree has the use of social media contributed to your company's performance during the last year?
- [48](#) By what percent has the contribution of social media to your company's performance changed in the last year?

Topic 8: Marketing Jobs

- [49](#) What percent of marketing jobs in your company were lost during the last year?
- [50](#) What percent of these lost marketing jobs were senior manager roles?
- [51](#) Considering all marketing job losses in your company (not just senior managers), when do you anticipate these marketing jobs returning to 2019 levels?
- [52](#) What percent of marketing jobs in your company were added during the last year?
- [53](#) What percent of these added marketing jobs were senior manager roles?
- [54](#) Considering all marketing job additions in your company (not just senior managers), when do you anticipate these marketing jobs returning to 2019 levels?
- [55](#) Net Job Change = % Jobs Added - % Jobs Lost
- [56](#) By what percentage will your firm's marketing hires change in the next year?

Topic 9: Marketing Analytics

- [57](#) Which best describes how your company shows the long-term impact of marketing spend on your business?
- [58](#) To what extent is your company implementing artificial intelligence or machine learning into its marketing toolkit?
- [59](#) How, if at all, has this investment in AI and machine learning influenced how much time your marketers are able to spend on non-routine and more strategic projects in your company?

Topic 10: The Impact of Brexit on Marketing

- [60](#) How will Brexit affect your business?
- [61](#) To what degree do you feel your marketing function is prepared for Brexit?
- [62](#) To what degree has marketing been involved in your company's Brexit preparations?
- [63](#) To what degree have you adjusted your marketing strategy regarding Brexit?
- [64](#) What aspects of your marketing do you expect will be significantly impacted by Brexit?
- [65](#) How will Brexit change the role of marketing in your company?
- [66](#) To what degree have you proactively communicated with your customers about the potential effects of Brexit?

- [67](#) To what degree have you or do you intend to focus on your “Britishness” in your communications in response to Brexit?
- [68](#) Estimate, in terms of sales, what proportion of your sales currently stem from the UK, EU, versus the rest of world.
- [69](#) Predict how your sales will be distributed across the UK, EU, versus the rest of world after Brexit.
- [70](#) Overall, how will your company’s sales be affected by Brexit?

[Appendix: Firm-level Descriptive Information](#)

- [71](#) Which is your firm’s primary economic sector?
- [72](#) What is your firm’s primary industry sector?
- [73](#) What is the number of employees in your company?
- [74](#) What was your firm’s sales revenue in last 12 months?

**Topic 1: Macro-economic Forecasts - UK****Are you more or less optimistic about the UK economy compared to last quarter?**

	Number	Percent	95% CI
3=More	40	35.4 %	± 8.3 %
2=No Change	23	20.4 %	± 6.9 %
1=Less	50	44.2 %	± 8.7 %
Total	113	100.0 %	

Mean = 1.91

SD = 0.89

Missing Cases = 13

Response Percent = 89.7 %



Topic 1: Macro-economic Forecasts - UK

Rate your optimism about the UK economy on a scale from 0-100 with 0 being the least optimistic.

Minimum = 10.20

Maximum = 90

Mean = 50.74

Median = 60

Standard Deviation (Unbiased Estimate) = 20.25

95 Percent Confidence Interval Around The Mean = 47.02 - 54.46

Valid Cases = 114

Missing Cases = 12

Response Percent = 90.5%



Topic 2: Customer Behavior - UK

For this market, rank your customers' top three priorities (1, 2, 3) over the next 12 months, where 1 is most important.

(N=112)

	Mean & SD	1st Priority	2nd Priority	3rd Priority	Total
Low price	2.02 0.85	17 15.2%	14 12.5%	18 16.1%	49 43.8%
Superior product quality	1.77 0.81	36 32.1%	23 20.5%	18 16.1%	77 68.8%
Superior innovation	2.38 0.78	6 5.4%	9 8.0%	19 17.0%	34 30.4%
Excellent service	1.84 0.73	31 27.7%	39 34.8%	17 15.2%	87 77.7%
Trusting relationship	2.20 0.81	22 19.6%	27 24.1%	40 35.7%	89 79.5%



Topic 2: Customer Behavior - UK

If you were to insert “strong customer experience” into the above list of five factors, what rank would you give it? (where 1 is most important)

	Number	Percent	95% CI
1	37	32.7 %	± 8.1 %
2	43	38.1 %	± 8.4 %
3	17	15.0 %	± 6.1 %
4	6	5.3 %	± 3.8 %
5	8	7.1 %	± 4.3 %
6	2	1.8 %	± 2.2 %
Total	113	100.0 %	

Mean = 2.21

SD = 1.26

Missing Cases = 13

Response Percent = 89.7 %



Topic 2: Customer Behavior - UK

Focusing on this market, which customer activities increased, decreased, or had no change for your company in the prior 12 months?

(N=126)

	Mean & SD	Increase +1	No Change 0	Decrease -1	Total
Customer purchase volume	0.03 0.93	50 43.9%	17 14.9%	47 41.2%	114 100.0%
Customer price per unit	0.20 0.74	45 39.5%	47 41.2%	22 19.3%	114 100.0%
Customer value placed on digital experiences	0.76 0.49	89 78.8%	21 18.6%	3 2.7%	113 100.0%
Customer value placed on company attempts to do "good"	0.64 0.52	74 65.5%	37 32.7%	2 1.8%	113 100.0%
Customer will buy related products and services from my company	0.34 0.66	50 44.2%	51 45.1%	12 10.6%	113 100.0%
My company's ability to retain current customers	0.19 0.75	45 39.5%	46 40.4%	23 20.2%	114 100.0%
The entry of new customers into this market	0.23 0.74	47 41.2%	46 40.4%	21 18.4%	114 100.0%
My customer's ability to acquire new customers	0.32 0.81	62 54.4%	27 23.7%	25 21.9%	114 100.0%



Topic 2: Customer Behavior - UK

For this market, how much do customers trust your brand?

	Number	Percent	95% CI
1=Significantly below industry average	0	0.0 %	± 0.0 %
2	1	0.9 %	± 1.6 %
3	0	0.0 %	± 0.0 %
4	1	0.9 %	± 1.6 %
5=At industry average	4	3.5 %	± 3.1 %
6	7	6.1 %	± 4.1 %
7	16	14.0 %	± 5.9 %
8	56	49.1 %	± 8.8 %
9	19	16.7 %	± 6.3 %
10=Significantly above industry average	10	8.8 %	± 4.8 %
Total	114	100.0 %	

Mean = 7.89

SD = 1.30

Missing Cases = 12

Response Percent = 90.5 %



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

How has the role of marketing in your company changed during the Covid-19 pandemic?

	Number	Percent	95% CI
Increased in importance	81	73.0 %	± 8.5 %
Decreased in importance	11	9.9 %	± 5.0 %
No change	19	17.1 %	± 6.3 %
Total	111	100.0 %	

Missing Cases = 15

Response Percent = 88.1 %



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

What marketing objectives have you been focused on during the pandemic? (Rank your top three where 1 is high)

(N=113)

	Mean & SD	1	2	3	Not Ranked	Total
Building brand value that connects with customers	1.81 0.83	40 35.4%	25 22.1%	23 20.4%	25 22.1%	113 100.0%
Acquiring new customers	1.93 0.80	24 21.2%	24 21.2%	19 16.8%	46 40.7%	113 100.0%
Retaining current customers	1.94 0.81	23 20.4%	23 20.4%	19 16.8%	48 42.5%	113 100.0%
Increasing customer awareness of brand/company	2.15 0.79	16 14.2%	24 21.2%	26 23.0%	47 41.6%	113 100.0%
Improving marketing ROI	2.30 0.77	10 8.8%	17 15.0%	26 23.0%	60 53.1%	113 100.0%



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

Considering marketing opportunities, what activities have you shifted resources to during the pandemic? (check all that apply)

	Number	Percent	95% CI
Building better customer-facing digital interfaces	90	78.9 %	± 7.6 %
Expanding into new offerings - i.e., products and services	64	56.1 %	± 9.3 %
Improving data integration to allow for end-to-end customer tracking	64	56.1 %	± 9.3 %
Transforming our go-to-market business models	55	48.2 %	± 9.3 %
Investing in automation technologies to improve virtual communication with customers	49	43.0 %	± 9.2 %
Building partnerships	48	42.1 %	± 9.2 %
Improving our research and experimentation capabilities	36	31.6 %	± 8.7 %
Expanding into new geographies, segments	28	24.6 %	± 8.0 %
Engaging in mergers & acquisitions	10	8.8 %	± 5.3 %
Total	444		

Number of Cases = 114

Number of Responses = 444

Average Number Of Responses Per Case = 3.9

Number Of Cases With At Least One Response = 114

Response Percent = 100.0 %



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

How well did the marketing strategies used during the Covid-19 pandemic work in the short-term?

	Number	Percent	95% CI
1=Very Poorly	1	0.9 %	± 1.6 %
2	1	0.9 %	± 1.6 %
3	4	3.5 %	± 3.1 %
4	11	9.6 %	± 5.0 %
5	40	35.1 %	± 8.3 %
6	40	35.1 %	± 8.3 %
7=Very effectively	17	14.9 %	± 6.1 %
Total	114	100.0 %	

Mean = 5.42

SD = 1.11

Missing Cases = 12

Response Percent = 90.5 %



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

Taking your best guess, to what degree do you think the marketing strategies used during the Covid-19 pandemic will be important opportunities for your company in the long-term?

	Number	Percent	95% CI
1=Not at all	1	0.9 %	± 1.6 %
2	1	0.9 %	± 1.6 %
3	6	5.3 %	± 3.8 %
4	4	3.5 %	± 3.1 %
5	30	26.3 %	± 7.6 %
6	43	37.7 %	± 8.4 %
7=A great deal	29	25.4 %	± 7.5 %
Total	114	100.0 %	

Mean = 5.68

SD = 1.18

Missing Cases = 12

Response Percent = 90.5 %



Topic 3: Managing Marketing in the Covid-19 Pandemic - UK

How much time do you spend managing the present versus preparing for the future of marketing in your company?

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Managing the present	60.90	19.43	57.34 - 64.47	65	10	99	114
Preparing for the future	39.10	19.43	35.53 - 42.66	35	1	90	114



Topic 4: Marketing Leadership - UK

How well aligned are marketing and sales leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1=Not at all	0	0.0 %	± 0.0 %
2	1	0.9 %	± 1.6 %
3	4	3.6 %	± 3.1 %
4	16	14.4 %	± 5.9 %
5	23	20.7 %	± 6.9 %
6	48	43.2 %	± 8.6 %
7=Very Highly	19	17.1 %	± 6.3 %
Total	111	100.0 %	

Mean = 5.53

SD = 1.10

Missing Cases = 15

Response Percent = 88.1 %



Topic 4: Marketing Leadership - UK

How well aligned are marketing and finance leaders in your company on goals, strategies, and tools/data?

	Number	Percent	95% CI
1=Not at all	1	0.9 %	± 1.6 %
2	4	3.7 %	± 3.1 %
3	11	10.1 %	± 5.0 %
4	21	19.3 %	± 6.6 %
5	25	22.9 %	± 7.1 %
6	38	34.9 %	± 8.1 %
7=Very Highly	9	8.3 %	± 4.6 %
Total	109	100.0 %	

Mean = 4.97

SD = 1.33

Missing Cases = 17

Response Percent = 86.5 %



Topic 4: Marketing Leadership - UK

Relative to a year ago, rate the success your company has had in improving the DE&I of its:

(N=126)

	No Change	25% more	50% more	100% more	Total
Marketing employees	53 48.2%	35 31.8%	16 14.5%	6 5.5%	110 100.0%
Marketing partnerships	58 54.7%	31 29.2%	12 11.3%	5 4.7%	106 100.0%
Segmentation & targeting	66 62.9%	27 25.7%	9 8.6%	3 2.9%	105 100.0%
Product and service design	63 59.4%	29 27.4%	13 12.3%	1 0.9%	106 100.0%
Communications	26 24.3%	49 45.8%	24 22.4%	8 7.5%	107 100.0%
Brand	39 36.4%	40 37.4%	22 20.6%	6 5.6%	107 100.0%
Training	37 34.6%	40 37.4%	22 20.6%	8 7.5%	107 100.0%



Topic 4: Marketing Leadership - UK

By what percent has marketing spending on DE&I changed in the last year?

Minimum = -10

Maximum = 100

Mean = 8.10

Median = 0

Standard Deviation (Unbiased Estimate) = 17.03

95 Percent Confidence Interval Around The Mean = 4.82 - 11.37

Valid Cases = 104

Missing Cases = 22

Response Percent = 82.5%



Topic 4: Marketing Leadership - UK

Rate the degree to which your company has developed an inclusive approach to marketing decision making, meaning you have established steps to review and/or evaluate marketing decisions from a DE&I perspective.

	Number	Percent	95% CI
1=Not at all	13	11.8 %	± 5.4 %
2	15	13.6 %	± 5.7 %
3	13	11.8 %	± 5.4 %
4	22	20.0 %	± 6.7 %
5	25	22.7 %	± 7.1 %
6	13	11.8 %	± 5.4 %
7=Very Highly	9	8.2 %	± 4.6 %
Total	110	100.0 %	

Mean = 3.96

SD = 1.79

Missing Cases = 16

Response Percent = 87.3 %



Topic 4: Marketing Leadership - UK

Check all of the actions your company is likely to make in order to reduce the negative impact of its marketing-related activities on the ecological environment (check all that are likely or that your company has already taken)

	Number	Percent	95% CI
Changing products and/or services	76	80.0 %	± 8.2 %
Changing partners	54	56.8 %	± 10.2 %
Changing marketing promotions	52	54.7 %	± 10.2 %
Changing distribution	40	42.1 %	± 10.1 %
Changing brand	20	21.1 %	± 8.4 %
<u>Changing market selection</u>	10	10.5 %	± 6.3 %
Total	252		

Number of Cases = 95

Number of Responses = 252

Average Number Of Responses Per Case = 2.7

Number Of Cases With At Least One Response = 95

Response Percent = 100.0 %



Topic 4: Marketing Leadership - UK

What factors interfere with your company doing more in the area of marketing sustainability? **(check all that apply)**

	Number	Percent	95% CI
Covid-19	56	60.9 %	± 10.2 %
The cost of such changes	49	53.3 %	± 10.4 %
We lack the expertise needed to make such changes	18	19.6 %	± 8.3 %
Customer resistance to such changes	15	16.3 %	± 7.7 %
Lack of executive support	15	16.3 %	± 7.7 %
Non-Covid-19 priorities have dominated our attention	13	14.1 %	± 7.3 %
Partner resistance to such changes	7	7.6 %	± 5.5 %
<u>It is not a good fit for our brand</u>	5	5.4 %	± 4.7 %
Total	178		

Number of Cases = 92

Number of Responses = 178

Average Number Of Responses Per Case = 1.9

Number Of Cases With At Least One Response = 92

Response Percent = 100.0 %

**Topic 4: Marketing Leadership - UK****Do you believe it is appropriate for your brand to take a stance on politically-charged issues?**

	Number	Percent	95% CI
Yes	43	39.4 %	± 8.4 %
No	66	60.6 %	± 8.9 %
Total	109	100.0 %	

Missing Cases = 17

Response Percent = 86.5 %



Topic 4: Marketing Leadership - UK

Rate the extent to which you believe your company is transparent with customers about the following topics:

(N=126)

	Mean & SD	1=Not at all	2	3	4	5	6	7=Very Highly	Total
Data collection	5.97 1.25	1 0.9%	1 0.9%	4 3.7%	6 5.6%	18 16.7%	30 27.8%	48 44.4%	108 100.0%
Data usage	5.90 1.29	2 1.9%	0 0.0%	4 3.7%	7 6.5%	19 17.8%	31 29.0%	44 41.1%	107 100.0%
Partnerships to source to bring products/ services to market	5.25 1.41	2 1.9%	3 2.8%	5 4.7%	19 17.8%	29 27.1%	25 23.4%	24 22.4%	107 100.0%
Employee welfare	5.33 1.50	1 0.9%	6 5.6%	7 6.5%	14 13.1%	21 19.6%	31 29.0%	27 25.2%	107 100.0%
Environment impact	5.09 1.37	2 1.9%	2 1.9%	10 9.3%	17 15.7%	33 30.6%	27 25.0%	17 15.7%	108 100.0%
Support of social and political causes	4.69 1.78	4 3.7%	11 10.3%	13 12.1%	20 18.7%	22 20.6%	12 11.2%	25 23.4%	107 100.0%
How your company makes money	4.99 1.65	6 5.6%	5 4.6%	7 6.5%	15 13.9%	28 25.9%	27 25.0%	20 18.5%	108 100.0%



Topic 5: Managing Growth - UK

Allocate 100 points to reflect your company's spending in each of the four growth strategies during the prior 12 months.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Existing products/services in existing markets	61.0	25.2	56.0 - 66.0	60	0	100	99
New products/services in existing markets	21.3	17.0	18.0 - 24.7	20	0	80	99
Existing products/services in new markets	10.9	12.8	8.4 - 13.4	10	0	80	99
New products/services in new markets	6.8	9.0	5.0 - 8.5	0	0	30	99



Topic 5: Managing Growth - UK

Allocate 100 points to reflect how your company will grow during the next 12 months.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Growth from your firm internally	70.4	30.1	64.5 - 76.3	80	0	100	100
Growth from acquisitions	11.3	20.6	7.3 - 15.3	0	0	100	100
Growth from partnerships	10.9	13.7	8.2 - 13.5	10	0	60	100
Growth from licensing arrangements	7.5	16.3	4.3 - 10.7	0	0	100	100



Topic 5: Managing Growth - UK

What percent of your marketing budget do you spend on domestic markets?

Minimum = 0

Maximum = 100

Mean = 56.55

Median = 60

Standard Deviation (Unbiased Estimate) = 39.04

95 Percent Confidence Interval Around The Mean = 48.66 - 64.44

Valid Cases = 94

Missing Cases = 32

Response Percent = 74.6%



Topic 5: Managing Growth - UK

What % of your firm's sales is domestic?

Minimum = 0

Maximum = 100

Mean = 54.79

Median = 60

Standard Deviation (Unbiased Estimate) = 38.85

95 Percent Confidence Interval Around The Mean = 47.06 - 62.53

Valid Cases = 97

Missing Cases = 29

Response Percent = 77.0%



Topic 5: Managing Growth - UK

What % of your firm's sales is through the Internet?

Minimum = 0

Maximum = 85.72

Mean = 23.78

Median = 10

Standard Deviation (Unbiased Estimate) = 28.89

95 Percent Confidence Interval Around The Mean = 18.68 - 28.89

Valid Cases = 123

Missing Cases = 3

Response Percent = 97.6%



Topic 6: Marketing Spending and Performance - UK

Marketing expenses account for what percent of your firm's overall budget?

Minimum = 0.30

Maximum = 46.32

Mean = 13.55

Median = 10

Standard Deviation (Unbiased Estimate) = 12.86

95 Percent Confidence Interval Around The Mean = 10.83 - 16.26

Valid Cases = 86

Missing Cases = 40

Response Percent = 68.3%



Topic 6: Marketing Spending and Performance - UK

Marketing expenses account for what percent of your firm's revenues?

Minimum = 0

Maximum = 38.40

Mean = 7.38

Median = 5

Standard Deviation (Unbiased Estimate) = 8.23

95 Percent Confidence Interval Around The Mean = 5.71 - 9.04

Valid Cases = 94

Missing Cases = 32

Response Percent = 74.6%



Topic 6: Marketing Spending and Performance - UK

By what percent has your marketing spending changed in the prior 12 months? Be sure to report the level and direction of the change

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Overall marketing spending	-17.04	28.15	-22.65 - -11.44	-12.50	-78.57	46.46	97
Digital marketing spending	9.57	32.50	3.03 - 16.10	10	-75	100	95



Topic 6: Marketing Spending and Performance - UK

Relative to the prior 12 months, note your company's percentage change in spending during the next 12 months in each area.

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
Digital marketing spending	18.71	20.84	14.54 - 22.88	15	-30.21	68.71	96
Brand building	15.06	20.78	10.92 - 19.19	10	-33.81	65.74	97
Overall marketing spending	10.56	21.16	6.33 - 14.80	10	-37.72	58.39	96
Traditional advertising spending	-4.06	21.77	-8.47 - 0.34	0	-57.37	47.47	94



Topic 6: Marketing Spending and Performance - UK

What percent of your marketing budget is currently spent on initiatives related to customer experience?

Minimum = 0

Maximum = 100

Mean = 19.52

Median = 10

Standard Deviation (Unbiased Estimate) = 23.41

95 Percent Confidence Interval Around The Mean = 14.79 - 24.25

Valid Cases = 94

Missing Cases = 32

Response Percent = 74.6%



Topic 6: Marketing Spending and Performance - UK

What percent of your marketing budget was spent on initiatives related to customer experience one year ago?

Minimum = 0

Maximum = 100

Mean = 16.77

Median = 10

Standard Deviation (Unbiased Estimate) = 22.56

95 Percent Confidence Interval Around The Mean = 12.21 - 21.33

Valid Cases = 94

Missing Cases = 32

Response Percent = 74.6%



Topic 6: Marketing Spending and Performance - UK

Compared to 2019, rate your company's performance during the prior 12 months: Sales revenue

	Number	Percent	Cumulative
-75%	9	9.6 %	9.6 %
-50%	3	3.2 %	12.8 %
-40%	6	6.4 %	19.1 %
-30%	5	5.3 %	24.5 %
-20%	11	11.7 %	36.2 %
-10%	10	10.6 %	46.8 %
-7%	0	0.0 %	46.8 %
-5%	1	1.1 %	47.9 %
-3%	2	2.1 %	50.0 %
-1%	0	0.0 %	50.0 %
0	11	11.7 %	61.7 %
+1%	1	1.1 %	62.8 %
+3%	4	4.3 %	67.0 %
+5%	6	6.4 %	73.4 %
+7%	1	1.1 %	74.5 %
+10%	9	9.6 %	84.0 %
+20%	7	7.4 %	91.5 %
+30%	3	3.2 %	94.7 %
+40%	2	2.1 %	96.8 %
+50%	2	2.1 %	98.9 %
+75%	1	1.1 %	100.0 %
Total	94	100.0 %	100.0 %

Mean = -9.80

SD = 30.95

Missing Cases = 32

Response Percent = 74.6 %



Topic 6: Marketing Spending and Performance - UK

Compared to 2019, rate your company's performance during the prior 12 months: Profits

	Number	Percent	Cumulative
-75%	11	12.6 %	12.6 %
-50%	3	3.4 %	16.1 %
-40%	3	3.4 %	19.5 %
-30%	3	3.4 %	23.0 %
-20%	5	5.7 %	28.7 %
-10%	11	12.6 %	41.4 %
-7%	0	0.0 %	41.4 %
-5%	4	4.6 %	46.0 %
-3%	0	0.0 %	46.0 %
-1%	0	0.0 %	46.0 %
0	13	14.9 %	60.9 %
+1%	0	0.0 %	60.9 %
+3%	1	1.1 %	62.1 %
+5%	10	11.5 %	73.6 %
+7%	4	4.6 %	78.2 %
+10%	6	6.9 %	85.1 %
+20%	3	3.4 %	88.5 %
+30%	4	4.6 %	93.1 %
+40%	1	1.1 %	94.3 %
+50%	1	1.1 %	95.4 %
+75%	4	4.6 %	100.0 %
Total	87	100.0 %	100.0 %

Mean = -8.09

SD = 35.25

Missing Cases = 39

Response Percent = 69.0 %



Topic 6: Marketing Spending and Performance - UK

Compared to 2019, rate your company's performance during the prior 12 months: Customer acquisition

	Number	Percent	Cumulative
-75%	3	3.4 %	3.4 %
-50%	2	2.2 %	5.6 %
-40%	0	0.0 %	5.6 %
-30%	5	5.6 %	11.2 %
-20%	1	1.1 %	12.4 %
-10%	5	5.6 %	18.0 %
-7%	0	0.0 %	18.0 %
-5%	3	3.4 %	21.3 %
-3%	1	1.1 %	22.5 %
-1%	1	1.1 %	23.6 %
0	16	18.0 %	41.6 %
+1%	3	3.4 %	44.9 %
+3%	7	7.9 %	52.8 %
+5%	14	15.7 %	68.5 %
+7%	2	2.2 %	70.8 %
+10%	12	13.5 %	84.3 %
+20%	4	4.5 %	88.8 %
+30%	5	5.6 %	94.4 %
+40%	3	3.4 %	97.8 %
+50%	1	1.1 %	98.9 %
+75%	1	1.1 %	100.0 %
Total	89	100.0 %	100.0 %

Mean = 1.56

SD = 23.33

Missing Cases = 37

Response Percent = 70.6 %



Topic 6: Marketing Spending and Performance - UK

Compared to 2019, rate your company's performance during the prior 12 months: Customer retention

	Number	Percent	Cumulative
-75%	3	3.3 %	3.3 %
-50%	0	0.0 %	3.3 %
-40%	1	1.1 %	4.4 %
-30%	4	4.4 %	8.9 %
-20%	3	3.3 %	12.2 %
-10%	5	5.6 %	17.8 %
-7%	0	0.0 %	17.8 %
-5%	5	5.6 %	23.3 %
-3%	4	4.4 %	27.8 %
-1%	2	2.2 %	30.0 %
0	27	30.0 %	60.0 %
+1%	3	3.3 %	63.3 %
+3%	5	5.6 %	68.9 %
+5%	8	8.9 %	77.8 %
+7%	0	0.0 %	77.8 %
+10%	12	13.3 %	91.1 %
+20%	6	6.7 %	97.8 %
+30%	1	1.1 %	98.9 %
+40%	0	0.0 %	98.9 %
+50%	0	0.0 %	98.9 %
+75%	1	1.1 %	100.0 %
Total	90	100.0 %	100.0 %

Mean = -1.46

SD = 19.58

Missing Cases = 36

Response Percent = 71.4 %



Topic 6: Marketing Spending and Performance - UK

Overall, how would you rate your company's marketing excellence?

	Number	Percent	95% CI
7=Excellent - one of the best in the world	8	7.6 %	± 4.3 %
6=A leader but not one of the best	25	23.8 %	± 7.1 %
5=Strong	40	38.1 %	± 8.3 %
4=Good	16	15.2 %	± 5.9 %
3=Fair	10	9.5 %	± 4.8 %
2=Weak	6	5.7 %	± 3.8 %
1=Very weak	0	0.0 %	± 0.0 %
Total	105	100.0 %	

Mean = 4.88

SD = 1.26

Missing Cases = 21

Response Percent = 83.3 %



Topic 7: Digital, Mobile, and Social Media Marketing

To what degree has the use of digital marketing contributed to your company's performance during the last year?

	Number	Percent	95% CI
1=Not at all	0	0.0 %	± 0.0 %
2	2	1.8 %	± 2.2 %
3	5	4.5 %	± 3.5 %
4	8	7.2 %	± 4.3 %
5	25	22.5 %	± 7.1 %
6	34	30.6 %	± 7.9 %
7=Very Highly	37	33.3 %	± 8.1 %
Total	111	100.0 %	

Mean = 5.76

SD = 1.22

Missing Cases = 15

Response Percent = 88.1 %



Topic 7: Digital, Mobile, and Social Media Marketing

By what percent has the contribution of digital marketing to your company's performance changed in the last year?

Minimum = -10

Maximum = 100

Mean = 39.27

Median = 30

Standard Deviation (Unbiased Estimate) = 30.20

95 Percent Confidence Interval Around The Mean = 33.60 - 44.94

Valid Cases = 109

Missing Cases = 17

Response Percent = 86.5%



Topic 7: Digital, Mobile, and Social Media Marketing

Thinking about your company's digital marketing knowledge and skills, rate your company's current expertise level on the following scale.

	Number	Percent	95% CI
1=Significantly below industry average	0	0.0 %	± 0.0 %
2	2	1.8 %	± 2.2 %
3	3	2.7 %	± 2.7 %
4	14	12.5 %	± 5.6 %
5=At industry average	15	13.4 %	± 5.7 %
6	25	22.3 %	± 7.1 %
7	23	20.5 %	± 6.9 %
8	21	18.8 %	± 6.6 %
9	4	3.6 %	± 3.1 %
10=Significantly above industry average	5	4.5 %	± 3.5 %
Total	112	100.0 %	

Mean = 6.33

SD = 1.75

Missing Cases = 14

Response Percent = 88.9 %



Topic 7: Digital, Mobile, and Social Media Marketing

Rate your company's digital marketing expertise level one year ago.

	Number	Percent	95% CI
1=Significantly below industry average	3	2.7 %	± 2.7 %
2	5	4.4 %	± 3.5 %
3	18	15.9 %	± 6.2 %
4	24	21.2 %	± 7.0 %
5	23	20.4 %	± 6.9 %
6	19	16.8 %	± 6.3 %
7	12	10.6 %	± 5.2 %
8	4	3.5 %	± 3.1 %
9	3	2.7 %	± 2.7 %
10=Significantly above industry average	2	1.8 %	± 2.2 %
Total	113	100.0 %	

Mean = 4.91

SD = 1.86

Missing Cases = 13

Response Percent = 89.7 %



Topic 7: Digital, Mobile, and Social Media Marketing

What investments did your company make to improve the performance of your digital marketing activities over the last year? (check all that apply)

	Number	Percent	95% CI
Digital media and search	78	69.6 %	± 8.7 %
Optimization of company website	78	69.6 %	± 8.7 %
Direct digital marketing (e.g., email)	74	66.1 %	± 8.9 %
Data analytics	74	66.1 %	± 8.9 %
Marketing technology systems or platforms	60	53.6 %	± 9.4 %
Online experimentation and/or A/B testing	58	51.8 %	± 9.4 %
Managing privacy issues	32	28.6 %	± 8.5 %
Machine learning and automation	25	22.3 %	± 7.8 %
Total	479		

Number of Cases = 112

Number of Responses = 479

Average Number Of Responses Per Case = 4.3

Number Of Cases With At Least One Response = 112

Response Percent = 100.0 %



Topic 7: Digital, Mobile, and Social Media Marketing

What percent of your marketing budget do you spend on mobile activities? Mobile Marketing Budget

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
What percent of your marketing budget do you currently spend on mobile activities?	14.57	15.64	11.54 - 17.60	10	0	50.55	102
% What percent will you spend on mobile in the next 12 months?	19.25	20.18	15.33 - 23.16	10	0	80	102
What percent will you spend on mobile activities in five years?	28.79	24.21	24.07 - 33.51	25	0	78.42	101



Topic 7: Digital, Mobile, and Social Media Marketing

To what degree has the use of mobile marketing contributed to your company's performance during the pandemic?

	Number	Percent	95% CI
1=Not at all	32	30.2 %	± 7.7 %
2	21	19.8 %	± 6.6 %
3	7	6.6 %	± 4.1 %
4	16	15.1 %	± 5.9 %
5	21	19.8 %	± 6.6 %
6	6	5.7 %	± 3.8 %
7=A great deal	3	2.8 %	± 2.7 %
Total	106	100.0 %	

Mean = 3.03

SD = 1.83

Missing Cases = 20

Response Percent = 84.1 %



Topic 7: Digital, Mobile, and Social Media Marketing

By what percent has the contribution of mobile marketing to your company's performance changed in the last year?

Minimum = 0

Maximum = 100

Mean = 12.86

Median = 2

Standard Deviation (Unbiased Estimate) = 21.40

95 Percent Confidence Interval Around The Mean = 8.71 - 17.02

Valid Cases = 102

Missing Cases = 24

Response Percent = 81.0%



Topic 7: Digital, Mobile, and Social Media Marketing

What percent of your marketing budget do you spend on social media?

	Mean	SD	95% CI	Median	Total
...of your marketing budget do you currently spend on social media?	15.58	13.31	13.04 - 18.13	10	105
...will you spend in the next 12 months?	19.84	14.69	17.03 - 22.65	15	105
...do you predict you will spend in five years?	25.81	16.99	22.54 - 29.07	20	104



Topic 7: Digital, Mobile, and Social Media Marketing

To what degree has the use of social media contributed to your company's performance?

	Number	Percent	95% CI
1=Not At All	1	0.9 %	± 1.6 %
2	13	11.8 %	± 5.4 %
3	16	14.5 %	± 5.9 %
4	28	25.5 %	± 7.4 %
5	28	25.5 %	± 7.4 %
6	16	14.5 %	± 5.9 %
7=Very Highly	8	7.3 %	± 4.3 %
Total	110	100.0 %	

Mean = 4.35

SD = 1.44

Missing Cases = 16

Response Percent = 87.3 %



Topic 7: Digital, Mobile, and Social Media Marketing

By what percent has the contribution of social media to your company's performance changed in the last year?

Minimum = 0

Maximum = 100

Mean = 20.82

Median = 10

Standard Deviation (Unbiased Estimate) = 25.21

95 Percent Confidence Interval Around The Mean = 15.97 - 25.66

Valid Cases = 104

Missing Cases = 22

Response Percent = 82.5%



Topic 8: Marketing Jobs - UK

What percent of marketing jobs in your company were lost during the last year?

Minimum = 0

Maximum = 70

Mean = 8.81

Median = 0

Standard Deviation (Unbiased Estimate) = 15.12

95 Percent Confidence Interval Around The Mean = 6.03 - 11.60

Valid Cases = 113

Missing Cases = 13

Response Percent = 89.7%



Topic 8: Marketing Jobs - UK

What percent of these lost marketing jobs were senior manager roles?

Minimum = 0

Maximum = 100

Mean = 22.42

Median = 15

Standard Deviation (Unbiased Estimate) = 24.75

95 Percent Confidence Interval Around The Mean = 15.41 - 29.42

Valid Cases = 48

Missing Cases = 1

Response Percent = 98.0%

*Asked only of respondents who reported marketing jobs lost last year.



Topic 8: Marketing Jobs - UK

Considering all marketing job losses in your company (not just senior managers), when do you anticipate these marketing jobs returning to 2019 levels?

	Number	Percent	95% CI
1 month	1	2.0 %	± 4.1 %
2-3 months	3	6.1 %	± 7.0 %
4-6 months	1	2.0 %	± 4.1 %
6-12 months	7	14.3 %	± 10.2 %
1-2 years	16	32.7 %	± 13.6 %
3+ years	11	22.4 %	± 12.1 %
Never	10	20.4 %	± 11.7 %
Total	49	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %

*Asked only of respondents who reported marketing jobs lost last year.



Topic 8: Marketing Jobs - UK

What percent of marketing jobs in your company were added during the last year?

Minimum = 0

Maximum = 75

Mean = 5.52

Median = 0

Standard Deviation (Unbiased Estimate) = 10.42

95 Percent Confidence Interval Around The Mean = 3.60 - 7.43

Valid Cases = 114

Missing Cases = 12

Response Percent = 90.5%



Topic 8: Marketing Jobs - UK

What percent of these added marketing jobs were senior manager roles?

Minimum = 0

Maximum = 100

Mean = 33.70

Median = 20

Standard Deviation (Unbiased Estimate) = 37.04

95 Percent Confidence Interval Around The Mean = 22.76 - 44.65

Valid Cases = 44

Missing Cases = 0

Response Percent = 100.0%

*Asked only of respondents who reported marketing jobs added last year.



Topic 8: Marketing Jobs - UK

Considering all marketing job additions in your company (not just senior managers), when do you anticipate these jobs returning to 2019 levels?

	Number	Percent	95% CI
1 month	6	14.6 %	± 10.6 %
2-3 months	0	0.0 %	± 0.0 %
4-6 months	1	2.4 %	± 4.6 %
6-12 months	9	22.0 %	± 12.4 %
1-2 years	7	17.1 %	± 11.3 %
3+ years	3	7.3 %	± 7.8 %
Never	15	36.6 %	± 14.6 %
Total	41	100.0 %	

Missing Cases = 3

Response Percent = 93.2 %

*Asked only of respondents who reported marketing jobs added last year.



Topic 8: Marketing Jobs

Net Job Change = % Jobs Added - % Jobs Lost

Minimum = -70

Maximum = 75

Mean = -3.25

Median = 0

Standard Deviation (Unbiased Estimate) = 19.77

95 Percent Confidence Interval Around the Mean = -6.89 - 0.40

Valid Cases = 113

Missing Cases = 13

Response Percent = 89.7%



Topic 8: Marketing Jobs - UK

Compared to the number of marketing hires last year, by what percentage will your firm's marketing hires change in the next year?

Minimum = -30.00

Maximum = 41.35

Mean = 5.70

Median = 0

Standard Deviation (Unbiased Estimate) = 12.87

95 Percent Confidence Interval Around The Mean = 3.31 - 8.09

Valid Cases = 111

Missing Cases = 15

Response Percent = 88.1%

**Topic 9: Marketing Analytics - UK****Which best describes how your company shows the long-term impact of marketing spend on your business?**

	Number	Percent	95% CI
We prove the impact quantitatively	60	54.1 %	± 8.9 %
We have a good qualitative sense of the impact, but not a quantitative impact	43	38.7 %	± 8.4 %
We haven't been able to show the impact yet	8	7.2 %	± 4.3 %
Total	111	100.0 %	

Missing Cases = 15

Response Percent = 88.1 %


Topic 9: Marketing Analytics - UK
To what extent is your company implementing artificial intelligence or machine learning into its marketing toolkit?

(N=126)

	Mean & SD	1=Not at all	2	3	4	5	6	7=Regular- ly	Total
Currently	2.17 1.40	46 43.0%	28 26.2%	16 15.0%	7 6.5%	8 7.5%	0 0.0%	2 1.9%	107 100.0%
Next three years	4.18 1.71	8 7.3%	9 8.2%	23 20.9%	23 20.9%	24 21.8%	8 7.3%	15 13.6%	110 100.0%



Topic 9: Marketing Analytics - UK

How, if at all, has this investment in AI and machine learning influenced how much time your marketers are able to spend on non-routine and more strategic projects in your company?

	Number	Percent	95% CI
1=No impact	47	45.6 %	± 8.6 %
2	22	21.4 %	± 6.7 %
3	14	13.6 %	± 5.6 %
4	11	10.7 %	± 5.0 %
5	6	5.8 %	± 3.8 %
6	2	1.9 %	± 2.2 %
7=A great deal	1	1.0 %	± 1.6 %
Total	103	100.0 %	

Mean = 2.19

SD = 1.44

Missing Cases = 23

Response Percent = 81.7 %



Topic 10: The Impact of Brexit on Marketing

How will Brexit affect your business?

	Number	Percent	95% CI
1=Negative effect	55	50.0 %	± 8.8 %
2=No effect	51	46.4 %	± 8.7 %
3=Positive effect	4	3.6 %	± 3.1 %
Total	110	100.0 %	

Mean = 1.54

SD = 0.57

Missing Cases = 16

Response Percent = 87.3 %



Topic 10: The Impact of Brexit on Marketing

To what degree do you feel your marketing function is prepared for Brexit?

	Number	Percent	95% CI
1=Not at all	9	8.3 %	± 4.6 %
2=Minor	20	18.5 %	± 6.5 %
3=Moderate	50	46.3 %	± 8.7 %
4=Highly	29	26.9 %	± 7.5 %
Total	108	100.0 %	

Mean = 2.92

SD = 0.89

Missing Cases = 18

Response Percent = 85.7 %



Topic 10: The Impact of Brexit on Marketing

To what degree has marketing been involved in your company's Brexit preparations?

	Number	Percent	95% CI
1=No role	32	29.6 %	± 7.7 %
2=Supporting role	64	59.3 %	± 8.9 %
3=Central role	10	9.3 %	± 4.8 %
4=Leading role	2	1.9 %	± 2.2 %
Total	108	100.0 %	

Mean = 1.83

SD = 0.66

Missing Cases = 18

Response Percent = 85.7 %



Topic 10: The Impact of Brexit on Marketing

To what degree have you adjusted your marketing strategy regarding Brexit?

	Number	Percent	95% CI
1=Not at all	54	50.0 %	± 8.8 %
2=Minor	40	37.0 %	± 8.3 %
3=Moderate	12	11.1 %	± 5.2 %
4=Highly	2	1.9 %	± 2.2 %
Total	108	100.0 %	

Mean = 1.65

SD = 0.75

Missing Cases = 18

Response Percent = 85.7 %



Topic 10: The Impact of Brexit on Marketing

What aspects of your marketing do you expect will be significantly impacted by Brexit? (check all that apply)

	Number	Percent	95% CI
Pricing	41	47.1 %	± 10.7 %
Channel or distribution	36	41.4 %	± 10.6 %
Marketing talent management	29	33.3 %	± 10.1 %
Consumer data management	28	32.2 %	± 10.0 %
Communications	25	28.7 %	± 9.7 %
Marketing alliances and partners	17	19.5 %	± 8.5 %
Consumer targeting	16	18.4 %	± 8.3 %
Consumer relationship management	13	14.9 %	± 7.6 %
Product/service portfolio	13	14.9 %	± 7.6 %
Salesforce management	12	13.8 %	± 7.4 %
Branding	7	8.0 %	± 5.8 %
Product/service innovation	7	8.0 %	± 5.8 %
Total	244		

Number of Cases = 87

Number of Responses = 244

Average Number Of Responses Per Case = 2.8

Number Of Cases With At Least One Response = 87

Response Percent = 100.0 %



Topic 10: The Impact of Brexit on Marketing

How will Brexit change the role of marketing in your company?

	Number	Percent	95% CI
1=Less important	4	3.6 %	± 3.1 %
2=No change	99	90.0 %	± 7.3 %
3=More important	7	6.4 %	± 4.1 %
Total	110	100.0 %	

Mean = 2.03

SD = 0.32

Missing Cases = 16

Response Percent = 87.3 %



Topic 10: The Impact of Brexit on Marketing

To what degree have you proactively communicated with your customers about the potential effects of Brexit?

	Number	Percent	95% CI
1=Not at all	36	33.0 %	± 8.0 %
2=Minor	32	29.4 %	± 7.7 %
3=Moderate	26	23.9 %	± 7.2 %
4=Highly	15	13.8 %	± 5.7 %
Total	109	100.0 %	

Mean = 2.18

SD = 1.05

Missing Cases = 17

Response Percent = 86.5 %



Topic 10: The Impact of Brexit on Marketing

To what degree have you or do you intend to focus on your “Britishness” in your communications in response to Brexit?

	Number	Percent	95% CI
1=Not at all	63	60.0 %	± 8.9 %
2=Minor	23	21.9 %	± 6.9 %
3=Moderate	12	11.4 %	± 5.2 %
4=Highly	7	6.7 %	± 4.1 %
Total	105	100.0 %	

Mean = 1.65

SD = 0.93

Missing Cases = 21

Response Percent = 83.3 %



Topic 10: The Impact of Brexit on Marketing

Estimate, in terms of sales, what proportion of your sales currently stem from the UK, EU, versus the rest of world:

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
% UK	55.1	38.1	47.7 - 62.4	60	0	100	103
% Rest of the world	28.8	29.5	23.1 - 34.5	20	0	90	103
% EU	16.1	16.8	12.8 - 19.3	15	0	95	103



Topic 10: The Impact of Brexit on Marketing

Predict how your sales will be distributed across these same categories after Brexit:

	Mean	SD	95% CI	Median	Minimum	Maximum	Total
% UK	53.9	38.1	46.5 - 61.3	57.5	0	100	101
% Rest of the world	30.3	29.5	24.6 - 36.1	20	0	90	101
% EU	15.8	16.3	12.6 - 19.0	12	0	95	101



Topic 10: The Impact of Brexit on Marketing

Overall, how will your company's sales be affected by Brexit (note direction and percentage of change using the scale below):

	Number	Percent	95% CI
-100%	0	0.0 %	± 0.0 %
-90%	0	0.0 %	± 0.0 %
-80%	0	0.0 %	± 0.0 %
-70%	1	0.9 %	± 1.6 %
-60%	0	0.0 %	± 0.0 %
-50%	0	0.0 %	± 0.0 %
-40%	1	0.9 %	± 1.6 %
-30%	0	0.0 %	± 0.0 %
-20%	4	3.8 %	± 3.1 %
-10%	26	24.5 %	± 7.2 %
0%	66	62.3 %	± 8.9 %
10%	4	3.8 %	± 3.1 %
20%	3	2.8 %	± 2.7 %
30%	0	0.0 %	± 0.0 %
40%	1	0.9 %	± 1.6 %
50%	0	0.0 %	± 0.0 %
60%	0	0.0 %	± 0.0 %
70%	0	0.0 %	± 0.0 %
80%	0	0.0 %	± 0.0 %
90%	0	0.0 %	± 0.0 %
100% or more	0	0.0 %	± 0.0 %
Total	106	100.0 %	

Mean = -2.92

SD = 11.12

Missing Cases = 20

Response Percent = 84.1 %

**Appendix: Firm-level Descriptive Information - UK****Which economic sector accounts for the majority of your company revenues?**

	Number	Percent	95% CI
B2B - Product	19	15.2 %	± 6.3 %
B2B - Services	33	26.4 %	± 7.8 %
B2C - Product	55	44.0 %	± 8.8 %
B2C - Services	18	14.4 %	± 6.2 %
Total	125	100.0 %	

Missing Cases = 1

Response Percent = 99.2 %



Appendix: Firm-level Descriptive Information - UK

Which industry sector best describes your company? (Sorted by highest to lowest response)

	Number	Percent	95% CI
Consumer Packaged Goods	26	20.6 %	± 7.2 %
Retail	20	15.9 %	± 6.5 %
Technology [Software/Platform]	16	12.7 %	± 5.9 %
Banking/Finance/Insurance	13	10.3 %	± 5.4 %
Professional Services/Consulting	12	9.5 %	± 5.2 %
Manufacturing	6	4.8 %	± 3.8 %
Communications/Media	6	4.8 %	± 3.8 %
Healthcare	6	4.8 %	± 3.8 %
Transportation	5	4.0 %	± 3.5 %
Consumer Services	4	3.2 %	± 3.1 %
Pharmaceuticals / Biotech	3	2.4 %	± 2.7 %
Education	3	2.4 %	± 2.7 %
Real Estate	2	1.6 %	± 2.2 %
Wholesale	2	1.6 %	± 2.2 %
Mining/Construction	1	0.8 %	± 1.6 %
Energy	1	0.8 %	± 1.6 %
Total	126	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %



Appendix: Firm-level Descriptive Information - UK

What is the number of employees in your company?

	Number	Percent	95% CI
Fewer than 50	9	7.1 %	± 4.6 %
50-99	15	11.9 %	± 5.7 %
100-499	29	23.0 %	± 7.5 %
500-999	10	7.9 %	± 4.8 %
1,000-2,499	12	9.5 %	± 5.2 %
2,500-4,999	13	10.3 %	± 5.4 %
5,000-9,999	11	8.7 %	± 5.0 %
More than 10,000	27	21.4 %	± 7.3 %
Total	126	100.0 %	

Missing Cases = 0

Response Percent = 100.0 %



Appendix: Firm-level Descriptive Information - UK

What was your company's sales revenue in last 12 months?

	Number	Percent	Cumulative
Less than £10 million	18	14.5 %	14.5 %
£10-25 million	9	7.3 %	21.8 %
£26-99 million	23	18.5 %	40.3 %
£100-499 million	21	16.9 %	57.3 %
£500-999 million	12	9.7 %	66.9 %
£1-2.5 billion	12	9.7 %	76.6 %
£2.6-5 billion	12	9.7 %	86.3 %
£5.1-9.9 billion	3	2.4 %	88.7 %
£10-49 billion	12	9.7 %	98.4 %
<u>More than £50 billion</u>	<u>2</u>	<u>1.6 %</u>	<u>100.0 %</u>
Total	124	100.0 %	100.0 %

Missing Cases = 2

Response Percent = 98.4 %