



Market Data / Supplier Selection /
Event Presentations / User Experience
Benchmarking / Best Practice /
Template Files / Trends & Innovation



State of Integrated Marketing

Challenges and Rewards on the Road
Ahead

State of Integrated Marketing

Challenges and Rewards on the Road Ahead



Published June 2013

All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording or any information storage and retrieval system, without prior permission in writing from the publisher.

Copyright © Econsultancy.com Ltd 2013

Econsultancy London
4th Floor, Farringdon Point
29-35 Farringdon Road
London EC1M 3JF
United Kingdom

Telephone:
+44 207 269 1450

<http://econsultancy.com>
help@econsultancy.com

Econsultancy New York
350 7th Avenue, Suite 307
New York, NY 10001
United States

Telephone:
+1 212 971 0630

Contents

1. Executive Summary	4
1.1. About Econsultancy	6
1.2. Methodology	6
2. What is Integrated Marketing?	7
3. Obstacles to Integrated Marketing	10
4. Data and Technology	13
5. Key Findings: Humanity, Tech and the Secret Challenge of Integrated Marketing	16
5.1. The nemesis of integration is human nature.....	16
5.2. Technology can make a difference	18
5.3. For the best integrated marketers, it's not about algorithms ..	20
6. The Road Ahead.....	21
7. Appendix: Respondent Profiles	22



1. Executive Summary

Marketers have always seen the value in tying their channels, campaigns and data together. There are obvious benefits in brand building, producing multiple complimentary touches and media efficiency.

The digital era brings new complexity and opportunities, but the building blocks and essential skills have been around for decades. This report, based on a survey of over 1,000 marketers and agency pros, looks at the modern definition of marketing integration, its benefits, challenges and the tools of the trade.

The full definition involves a number of pieces, because the practice involves every aspect and capability of a marketing department. But a practical description is simply having the parts work together and add up to something more than their sum.

The effects of integration are real and powerful, for companies of all sizes and specialties.

Regardless of what companies sell, whether they're on the client or agency side, senior or relatively new to digital, they agree on the effects they've seen from their organizations' efforts to integrate (most of which are still rudimentary).

- Nearly 90% describe integration as “necessary and inevitable” for mid-sized and large organizations. And that's with good reason; 83% of the sophisticated integrated marketers in the study reported that they see “a direct relationship between higher revenues and integration.”
- Creativity is the glue and inspiration in marketing, and integration asks marketers to rise to new levels. They recognize that challenge as a positive, with 74% saying that “integration sparks creativity and innovation.”
- Although internal politics present a significant obstacle to effective integration (which is explored at length in the report), the upside is that nearly two-thirds of respondents say that the effort to integrate does have a positive effect on those same politics.

Regardless of marketing spend, most organizations are still early in their evolution toward integrated marketing.

Of the six major elements of integrated marketing identified in the study, the majority of respondent companies are likely to be working with two or three. This suggests coordination, but not integration.

- Consolidated customer data is ranked second only to brand experience as essential to integrated marketing. Yet, only 37% say they have achieved this at any level.
- Coordinated customer experience is ranked fourth, which may be an issue in itself. 39% report that they are working with customer experience across channels, devices and platforms.
- The vast majority (92%) believe that “integrated marketing requires accurate channel attribution” but only 17% of those with more than \$5MM in annual marketing spend are using cross-channel attribution for integrated campaigns.

The obstacles to integrated marketing evolve as companies move toward digital excellence.

- Sophisticated organizations are concerned with creativity, ranking it their #2 challenge. Those still grappling with the basic structures of integrated rank it much lower.



- Unsophisticated companies rank strategy as their top challenge, seeing it as a necessary and missing ingredient to unifying the component ideas, processes and technology of integrated campaigns and programs.
- All types of company rate management support/resources highly, but for different reasons. Unsophisticated companies are putting pieces in place, while the more advanced want to expand existing efforts, while upgrading skills in data analysis and customer experience.

In most areas of integrated marketing skills, there are more companies behind the curve than in front of it.

- Among larger organizations, not one rated themselves as “above average” in conducting attribution analysis for their integrated campaigns, compared to 30% describing themselves as “below average.”
- Coordination user experience is also an issue. 22% of large spenders described themselves as being “below average” compared to 11% who were happy with their performance in this area.
- The only areas that had neutral or positive ratios of above average performance to low performance are messaging and branding across channels.

The technical and analytical elements of integrated marketing are only in place at a minority of companies.

- Among those spending over \$5MM on marketing, roughly 1 in 5 report having “current capabilities” in real-time data and integrating data across channels.
- Only 1 in 8 organizations has a current capability to work with “big” data or unstructured data in the context of their integrated marketing efforts.
- The industry is investing to bridge the data gap. Roughly twice as many companies are investing to gain these skills as those who currently employ them.

The report also looks at several key themes which emerged from the research.

- How the challenges and investments of sophisticated integrated marketers differ from the mainstream.
- How a company’s technology infrastructure correlates with their integrated marketing success.
- The key factor that is holding back integrated marketing at most organizations, and the number one variable in their performance.

1.1. About Econsultancy

Econsultancy is a [global independent community-based publisher](#), focused on best practice digital marketing and ecommerce, and used by over 400,000 internet professionals every month.

Our hub has 200,000+ subscribers worldwide from clients, agencies and suppliers alike with over 90% subscriber retention rate. We help our subscribers build their internal capabilities via a combination of research reports and how-to guides, training and development, consultancy, face-to-face conferences, forums and professional networking.

For the last 10 years, our resources have helped subscribers learn, make better decisions, build business cases, find the best suppliers, accelerate their careers and lead the way in best practice and innovation.

Econsultancy has offices in London, New York, Sydney and Singapore and we are a leading provider of digital marketing training and consultancy. We are providing consultancy and custom training extensively across Europe, Asia and the US. We train over 5,000 marketers each year.

[Join Econsultancy](#) today to learn what's happening in digital marketing – and what works.

Call us to find out more on +1 212 971 0630 (New York) or +44 (0)20 7269 1450 (London). You can also [contact us online](#).

1.2. Methodology

The Integrated Marketing Survey was deployed on April 2nd, 2013 and closed on April 26th. The study was fielded to Econsultancy lists as well as to subscribers of Target Marketing. The link to the survey was also distributed via social media.

The study was completed with a total of 1,053 respondents, made up principally of client side marketers. Roughly one third of the sample was comprised of agency employees and consultants, who were given a related but distinct question set. For more on the exact makeup of the sample, please see the Appendix.

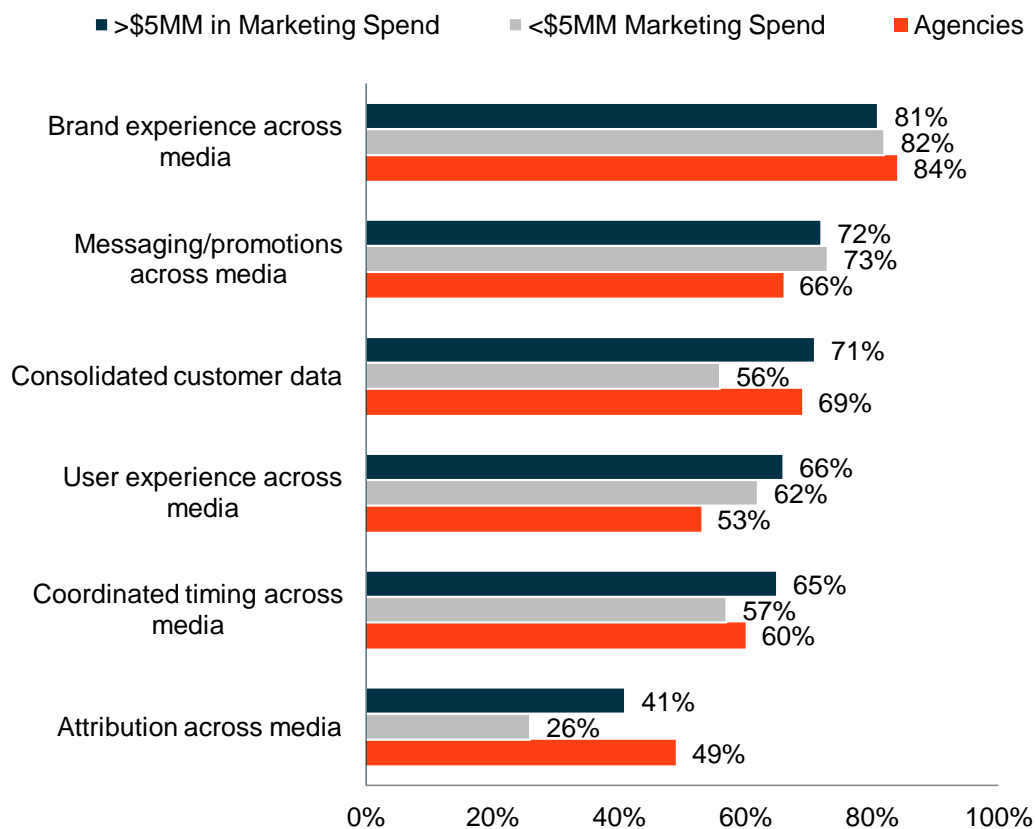
Throughout the report readers will not see a consistent segmentation of client side responses based on their annual marketing spend. Organizations that spend more than \$5MM on marketing have been split from those spending less for the purposes of comparison. Companies with less than \$5MM spend that are not engaged in any sort of integrated marketing have also been subtracted from relevant questions.

Budget size isn't always a strong indicator of what organizations can or should be doing, but in this case, we believe it to be a helpful metric. Integrated marketing can be split into two general camps – digital only and online/offline – and the best indicator we've found of that split is marketing spend.



2. What is Integrated Marketing?

Figure 1: Which of the following are important parts of integrated marketing?



N=942

What exactly is integrated marketing? Broadly it's the effort to have channels work together within common campaigns and programs, but that's just the tip of the iceberg.

When marketers deploy an integrated marketing campaign, they want to achieve better results through coordination. That means having some or all of the following gears turn in unison;

Brand experience

Brand means a lot of different things and includes some of the other items of this list. For example, one can argue that there's nothing more integral to a company's brand today than user experience. But we've separated these threads to look at each in more detail.

In this context, brand experience means the visual brand and how well companies use images, colors and logos to portray who they are in a complimentary way across channels and experiences.

Messaging/promotions

One of the most nuanced parts of an integrated campaign is messaging/promotions. That's because it's not as simple as using the same copy and offers.

On the contrary, different channels, devices and audiences demand unique treatment... all within a binding context.

User experience

The sum total of what it's like to read, view, interact or shop. What elements should be common across channels and what should be unique? How far do you go with time and money limitations? If only 7% of your traffic is mobile, but you know that it might be a very important audience, how do you invest for the future?

Timing

Fielding integrated marketing campaigns that include offline elements with long lead times can be like planning D-Day. Even multichannel campaigns which are online-only can be complex as the agencies and various vendors have to be managed and coordinated.

Also, timing doesn't always mean that everything happens at once; it's not uncommon for campaigns to have timed and/or triggered roll outs across channels and phases of the campaign.

Data

Unified data means having technologies and processes that speak the same language. It's a goal that's been a thorn in the side of marketing, especially as digital has expanded the channels that produce data and the silos that hold it.

Fortunately the tools for unification are becoming more effective and more economical as they move to the SAAS, cloud-based model.

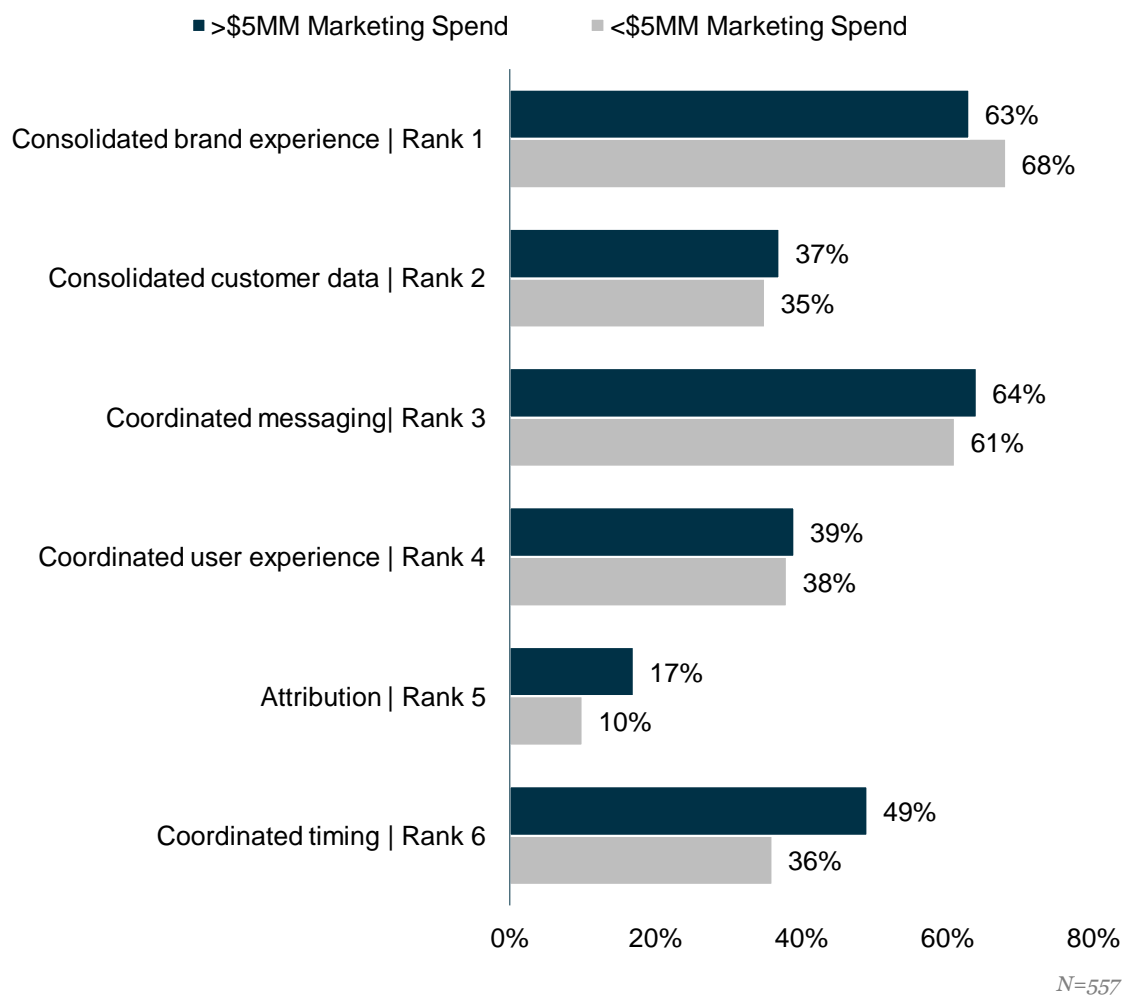
There are many reasons for unifying data and benefits to doing so, but one of the most important within the context of an integrated campaign is that current customers should be known and cherished and treated very differently from prospects.

Attribution

We hear the statistics and see the emerging models that describe how digital has changed shopping...that the customer journey is complex and marketers need to understand how the panoply of channels contribute to the end result. It's not easy, and the complexity rises with every wrinkle that's added. But in the end, we're not just learning what works, we're learning about our customers and how they use those channels.

These are the components of successful integrated marketing. Campaigns that do some or all of these things well are likely to be powerful and make more money than campaigns that exist in the vacuum of a single channel.

Figure 2: Which of these integrated marketing elements does your organization work with? (Ranked by importance to success)



It's one thing to identify the important elements of integrated marketing, but it's another to work effectively with all of them. Figure 2 highlights this gap. First, it ranks the importance of each piece of the integrated marketing capability chain, as rated by respondents. Second, it shows the percentage of organizations that say they are currently working with these elements.

The greatest need for improvement is to be found where low percentages intersect with high rankings.

- Customer Data – relatively few companies are content with their data consolidation and analysis for effective integrated marketing. Only about 35% describe themselves as working with consolidated customer data today.
- User experience – though “experience” is the most vital part of many brand interactions and the most thoroughly overused word in marketing, only about 40% report working with user experience as part of their integrated marketing.
- Attribution –92% of survey respondents say that attribution is a necessary part of omni-channel marketing, but fewer than 20% are working on it in the context of integration.

3. Obstacles to Integrated Marketing

Integrated marketing isn't easy, for a variety of reasons. We explored the challenges marketers face through the lens of their companies' sophistication. The assumption is that the severity of challenges will vary depending on where respondent organizations sit on the maturity scale.

Indeed, there are a number of differences, but let's first define "sophistication." That word can mean a lot of things in marketing; organizational structure, technological maturity and the ability to use data are all valid measures, among others. The one we'd prefer is a measure of return on each dollar invested by a company's subsector, but that's a calculation that many simply can't make accurately and most won't make public.

For our purposes, we created a point system based on the grades respondents gave themselves across a number of integrated marketing activities. We also asked them to evaluate their companies in general. Overlapping the two gave us a small but sufficient group of sophisticated marketing organizations to compare with the mainstream, which is a better way to think of this group than as "unsophisticated."

Here's the table that resulted when we asked marketers first to name the challenges their companies face in practicing integrated marketing, and then to rank those they'd encountered.

Table 1: Please rank the challenges your organization has encountered in its integrated marketing efforts.

	Sophisticated	Mainstream
Management support/resources	1	2
Cross-media creativity	2	5
Unifying technology	3	3
Strategy	4	1
Unifying and sharing customer data	5	4
International issues	6	7
Unifying and sharing brand assets	7	6

N=174/436

The challenges and their ranks are relatively consistent for the two groups in five cases, and significantly divergent in two. We'll look at all of them in the order that "sophisticated" companies ranked them. Rankings by the "mainstream" companies are in parentheses.

Challenge #1 (2) – Management Support and Resources

No matter who you are or what your organization's annual revenues amount to, you want more support. If you're in a marketing department just coming to grips with integrated marketing and its related parts, you're hoping for more money to put systems and technologies in place.

If you're already well on your way, then you're proving the return and want more resources to put behind the effort, or want to add higher level resources around data, attribution modelling or creative.

Challenge #2 (5) – Cross-media Creativity

The most interesting difference between the two groups lies with their views on creativity in integrated marketing. The implications are explored in length in **Section 5.3**, later in the report.

Challenge #3 (3) – Unifying technology

No disagreement here, as technology is fundamental to the rest of integrated marketing. Results are naturally limited if organizations are without the backbone to tie the data together – both before launch for targeting and segmentation as well as after launch for results and attribution.

The good news for companies still climbing the mountain is that they've got a wide array of choices and a growing army of vendors who want to help them, from retooled agencies and traditional integrators to management consultants. Of course, that's also the bad news.

Challenge #4 (1) – Strategy

Along with creative, strategy is a point of divergence between sophisticated companies and the mainstream. And it should be. Having and practicing a real strategy could itself be a viable definition of sophistication. Capability without direction is at best inefficient and at worst counterproductive.

For marketers working in the trenches and constantly bombarded with the “new” it's easy to be skeptical about the value of another meeting, deck or document that explores a nebulous idea of the way forward. If that's all the “strategy” is, they're right to nod, smile and never think of it again.

A true strategy is useful above all else. It's a set of principles that should be applicable in everyday situations. For example, a principle might be “We believe that mobile is the defining trend in our sector.” From that springs the mandate “We will behave like a mobile-first company.”

So even though the company is only seeing roughly 15% of their traffic from mobile devices, their decision making when it comes to mobile analytics, for example, is from the perspective of a company that's already getting most of its traffic or revenue from non-desktop sources.

Challenge #5 (4) – Unifying/Sharing Customer Data

How to collect, handle and use customer data is intertwined with technology, and the only reason it ranks lower is because the tech piece precedes more specific questions about how to deal with customer information once it's captured.

Those who are focused on these questions may find our recent report *Business Intelligence Meets Web Analytics: Breaking Down the Silos* valuable. It looks at the connections between approach and results, what data is most valuable and how to use it, as well as giving a number of detailed examples.

Challenge #6 (7) – International Issues

International issues rank low in general, but there's more internal variation in the data at the bottom of this table than at the top. In other words, international issues are relatively easy to deal with, unless they're not. They can be a significant thorn to integrated marketing, especially for those organizations without local agencies to help with unique media consumption, cultural norms and local competitive landscape.

Challenge #7 (6) – Unifying/Sharing Brand Assets

A bit like #6, unifying and sharing brand assets isn't an issue for many, but is an acute one for some. The hope for organizations that deal with a vast array of new and legacy creative assets is that workflow tools are improving. A look at the various integrated marketing platforms shows a new priority in the day to day processes that manage and share assets among teams and partnering organizations.

Table 2: Strengths and Weaknesses - Integrated marketing capabilities compared

	>\$5MM in Spend		<\$5MM in Spend	
	Above average	Below Average	Above average	Below Average
Attribution across media	0%	30%	9%	35%
Coordinated timing across media	10%	25%	18%	24%
User experience across media	11%	22%	7%	26%
Consolidated customer data	17%	29%	17%	28%
Messaging/promotions across media	15%	15%	13%	17%
Brand experience across media	17%	15%	11%	15%

N=331

Another way to look at how companies are dealing with the challenges of integration is to look at how they perform against those basic elements identified earlier. The table above explores the ratios between strong and weak performance on the various skills. The severity of the ratio gives us an idea of how far companies have to move to reset and improve the industry average.

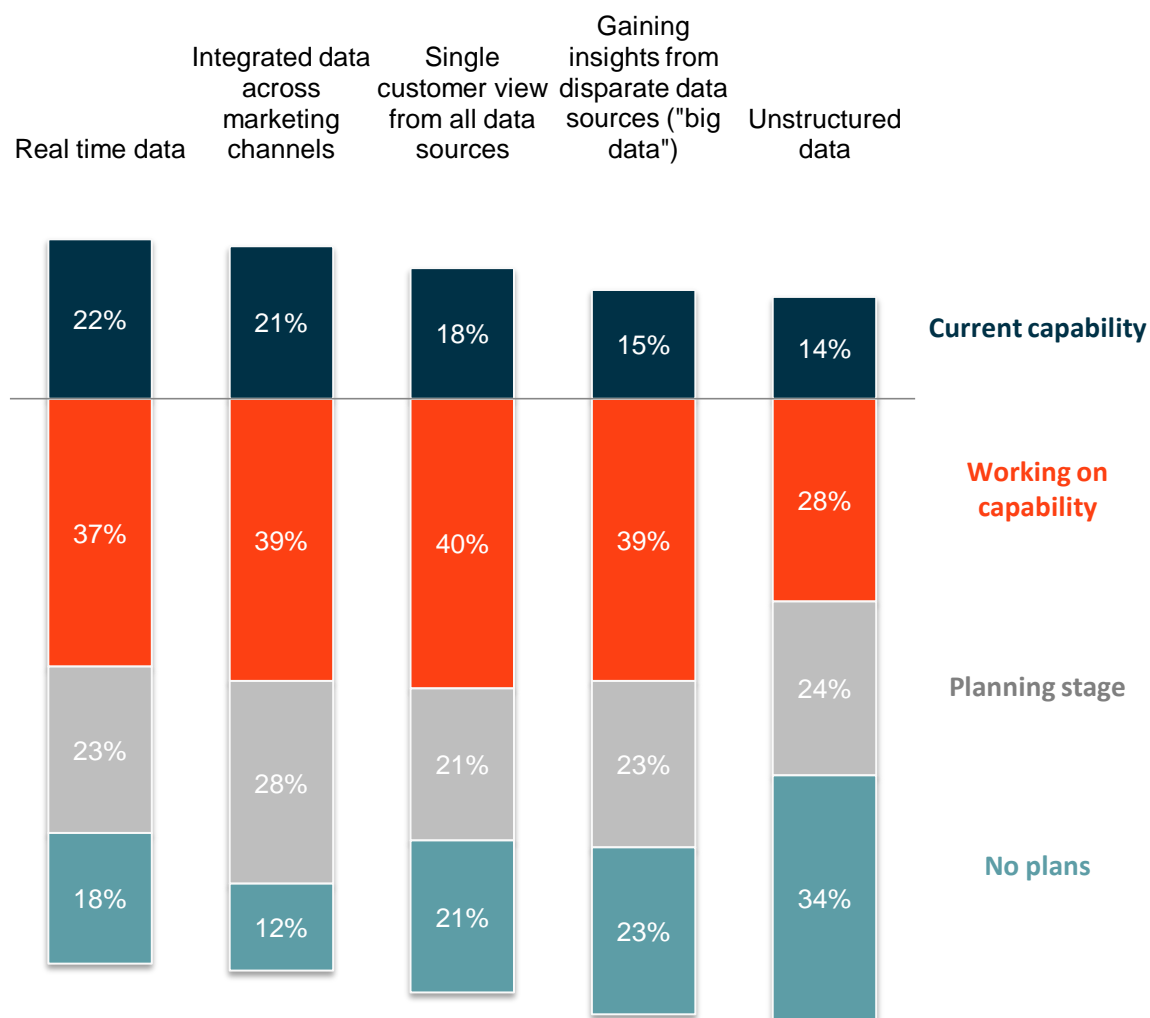
As we've already seen, attribution is a real challenge. Not one of the organizations with over \$5MM in spend describes themselves as "above average" while nearly one third are at the other end of the spectrum. For large scale marketers, coordination of timing becomes a real challenge, especially when offline elements are included. Rounding out the top three is user experience, where only 11% of companies describe themselves as above average, which sounds about right.

4. Data and Technology

One of the fundamental requirements for true integrated marketing is the ability to process data into information that identifies current and potential customers, ties together campaign results, calculates true cost, etc.

Most modern marketing organizations are working toward goals in data management, but few are already there.

Figure 3: How would you describe your organization's capability in the following areas? (>\$5 annual marketing spend)



N=174

The chart above suggests that even among companies spending more than \$5MM per year on marketing, only about 20% have baseline data skills. They describe themselves as having the “current capability” in *real time* and *integrated* data, as well as having a *single customer view*.

This relatively small group of top performers narrows further when it comes to the more enigmatic skills of managing “big” and “unstructured” data; only 13% and 12% describe themselves as having these capabilities today.

In this study, we defined “big” data not by volume, but by variety, asking organizations whether they have the ability to use disparate data sources to gain insight. An example might be merging weather, traffic and demographic data to optimize radio and OOH advertising.

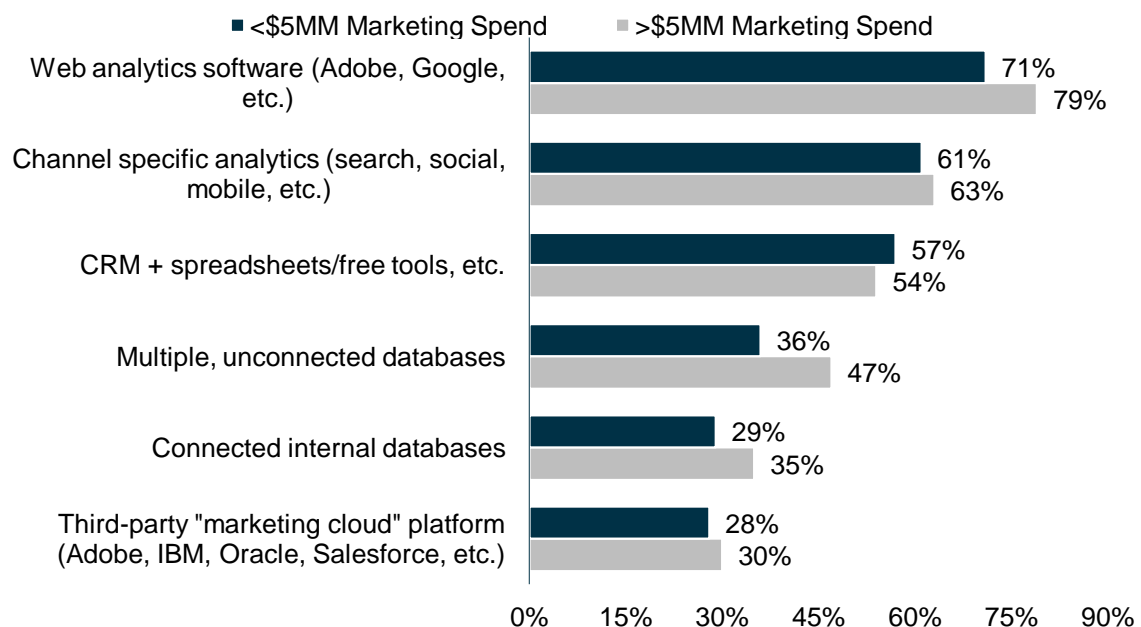
By definition, integrated marketing involves learning from many types of data. It’s certainly possible to be successful without the capability of analyzing them using “big data” techniques, but they offer a short-cut to efficiencies and more importantly, to the non-intuitive.

Unstructured data is exactly that; the words, records, ideas, images and other human creations that are churned out by civilization. It doesn’t fit neatly into a database, at least not in its raw form. Unstructured data leapt from the page to the processor with the first computers, but it really exploded with the advent of the Internet, and eventually our ability to document food in word and photo. An un-provable but plausible rule of thumb is that 80% of all business data is unstructured (backed up by a more specific [study of medical records](#) conducted by IBM.)

The Twitter “firehose” is a good example of why unstructured data is in such abundance, and why it can be valuable to businesses. Companies are using those [estimated](#) 36 million bits per second to look for customer service issues, product ideas and sentiment as well as making sophisticated adjustments to supply chain processes, delivery schedules and human resources planning.

The implications for integrated marketing are just starting to coalesce, but the logic is clear. Marketing increasingly relies on the participation and feedback of its target audience, most of which is inherently unstructured. Learning from that data, optimizing against it, and ultimately responding to it appears to be an inevitable priority, for consumer marketers today and no doubt for B2B marketers in the not so distant future.

Figure 4: Technologies employed for integrated marketing



N=561

The emphasis on technology is extreme in the digital marketing industry, and its promise in theory can sometimes outpace the specific reality for companies. It’s quite common for organizations to invest in technology and be disappointed. That can happen for any number of reasons, but in our experience, it’s usually not terrible tech or tech support.

In 2006 Avinash Kaushik [famously advised](#) that a web analytics implementation depended on an investment ratio of 90% “intelligent resources” to 10% technology.

Although this rule was intended for web analytics, our experience is that there are few exceptions in marketing technology. But it's a lot easier to pull the trigger on a piece of technology than on new employees. Likewise it's not easy to casually reorient existing staff to become experts in a new technology. That takes training and time.

The most frequent example we come across is in marketing automation. Whether it's an automation specific solution or an email service provider with that capability, the story is often the same; the technology is brought on, but results don't change significantly. The issue is not usually with the premise (automation can and does work) or with the technology itself, but with the organization's insufficient strategy and support.

Whatever the technology, the best way to take advantage of its most powerful capabilities is to turn them into specific goals for specific people. This might mean giving the email team a collective bonus around automation, or tying the evaluation of the mobile team to KPIs accessible through a new mobile analytics capability.

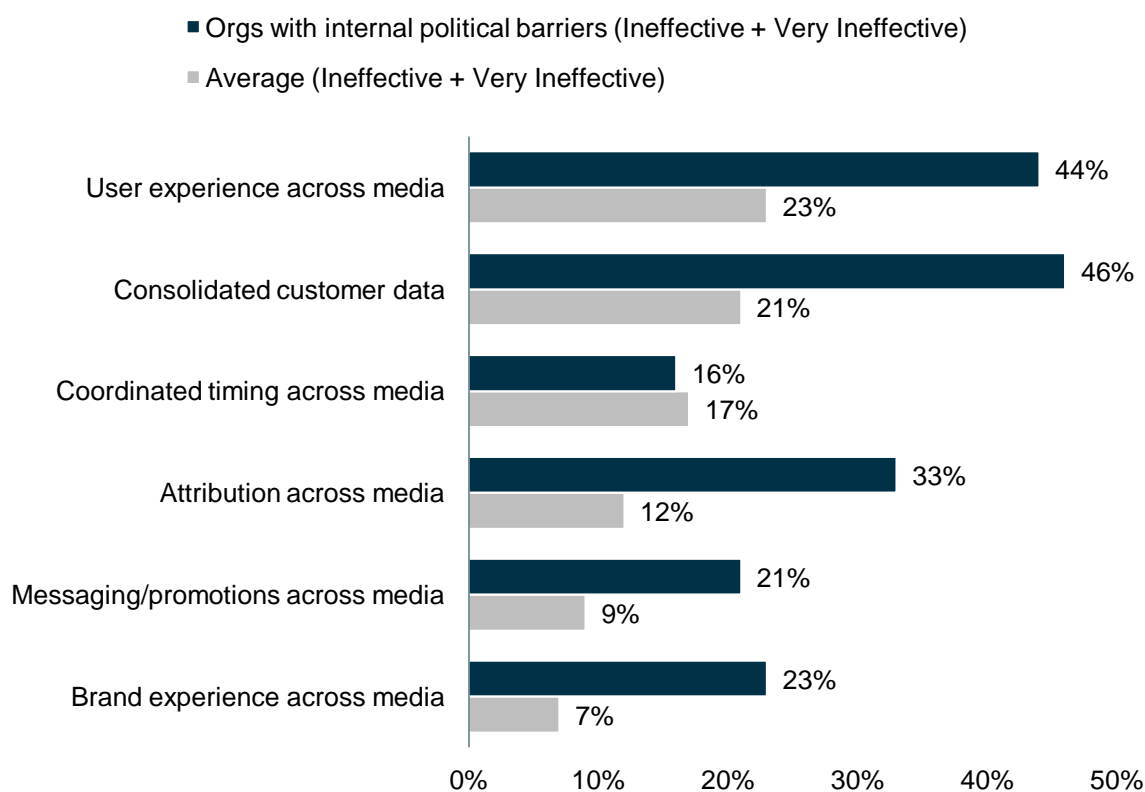
Integrated marketing platforms are the same. They bring an array of features and processes to the table, and the challenge is to use them.

One place to begin might be to incent marketing teams to use the workflow and communication tools available in most of the cloud/integrated solutions. Integration is all about process, so if the first step draws internal and external communications into one place, you'll be well on your way.

5. Key Findings: Humanity, Tech and the Secret Challenge of Integrated Marketing

5.1. The nemesis of integration is human nature

Figure 5: How effective is your organization at the elements of integrated marketing?



N=432

As we examined the data around making integrated campaigns a reality, one correlation stood out; companies with political barriers were far more likely to be failing. The chart below compares organizations that marketers describing as having “internal political barriers” and those that don’t.

The differences are stark. With the exception of “coordinated timing” there’s an enormous delta between the two groups; organizations with political bickering are two to three times more likely to describe themselves as failing in a given area.

A silver lining from the study is that conducting integrated marketing does correlate with improved relationships between channel teams. 62% of agency respondents (who are typically quite critical of client side orgs) agree that political issues are abated by practicing integrated marketing.

What’s more difficult to determine is what’s the chicken or egg in this scenario. Anyone with big company experience knows that simple repetition isn’t enough to work bad processes out of a

system. But this statistic does underscore the value in pushing ahead, of setting the goal of integration and doing whatever it takes to make it happen.

Changing internal dynamics can be the most challenging task leaders take on, and there are books and companies devoted to nothing else. But if there's a simple truth, it's that everything eventually comes down to incentive, negative and positive, because that's where human nature and business meet.

If you are paid or recognized for something that's not in line with integrated marketing, you're not going to be a big help. In fact, you might even work against it (your brain will come up with a good reason why, don't worry).

Organizations that want to integrate across channels, bring down silos or focus on the customer have to start by making working together to a common goal the basis of their compensation/incentive models.

What is the most significant challenge you/your clients face with integrated marketing?

“Siloed departments: media, marketing, sales, IT etc. Difficulty tying together many platforms/measurement systems involved in integrated marketing. Over-simplistic user journey and media buying models”

“Senior management delegate to lower level managers who either don't understand important to organization (vs their own biz unit) or don't have the experience to contribute (and disruptive to process when decisions are made based on incorrect assumptions or non-critical criteria)”

“Layered decision making slows down approval processes and leads to missed opportunities. Departmental territorialism limits openness to sharing and coordination needed for true marketing integration.”

“Protectionism of marketing function, budgets, siloed behavior among the teams are the big obstacles. The ability for brands to adapt their communications processes for real-time engagement is also a challenge.”

Survey respondents

5.2. Technology can make a difference

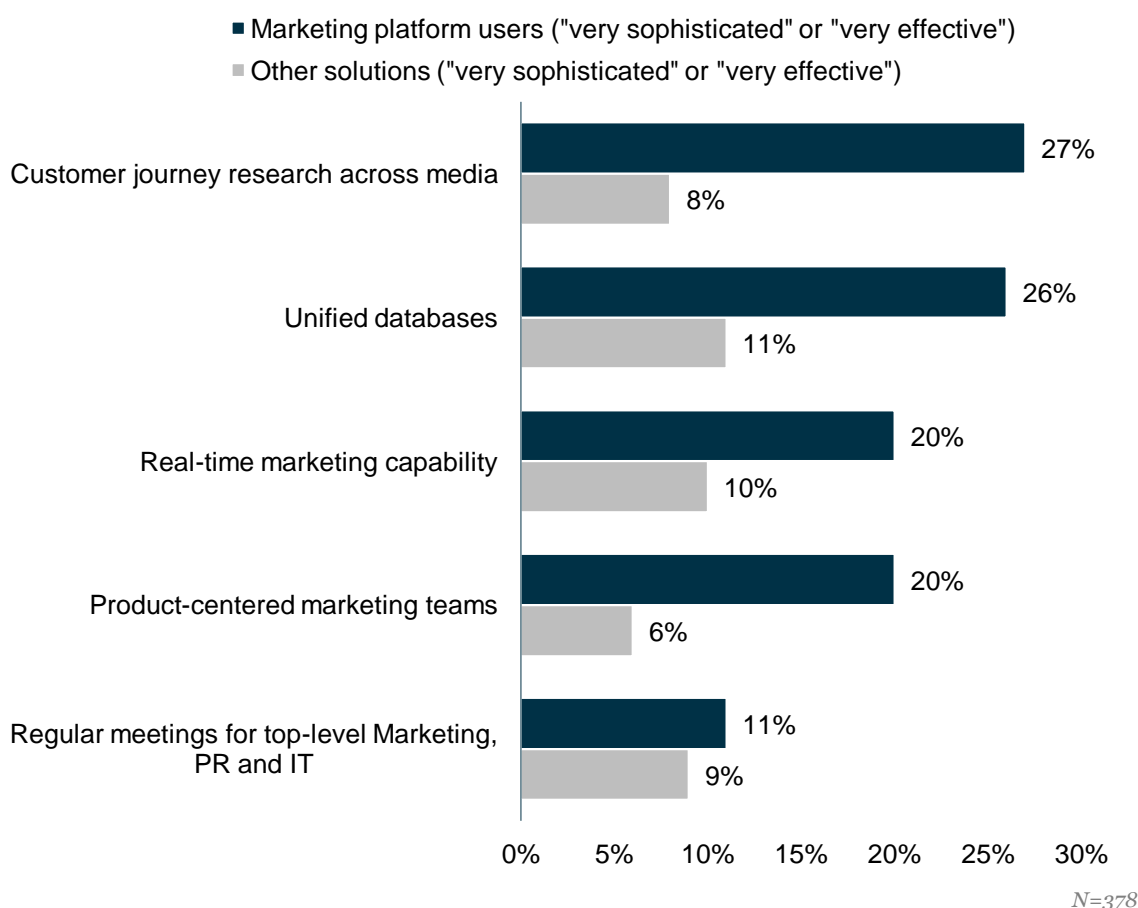
Integrated marketing is challenging for a number of reasons. Any truly integrated campaign has a number of moving parts, each with its own metrics, processes and format and often a variety of internal and external participants.

That being the case, we theorized that there would be a correlation between technologies that reduce complexity and integrated marketing success.

We defined these technologies narrowly as those which specifically aim to assist with the challenges of control and analysis of far flung marketing activities – the integrated marketing platforms, aka the “marketing clouds.”

The chart below compares organizations that have integrated platforms with those that don’t, and compensates for annual spending. The percentage of organizations that describe themselves as “very effective” or “very sophisticated” in each area varies significantly, showing at least a correlation between tech and success.

Figure 6: How effective is your organization at developing the fundamental capabilities necessary for integrated marketing?



Although the differences vary, there's a consistent lift among the marketing platform technology users. With the exception of attribution, these respondents are between 60% and 285% more likely to describe their integrated capabilities as “very effective” or “very sophisticated” than their peers who are using other means of managing integrated marketing.

Cloud systems promise the ability to tie together multiple systems for the management and measurement of disparate channels, and the largest differences between the groups support the claim.

For most products, the customer journey is complex and getting more so. The data above suggests that a significant benefit of having an integrated system is the ability to get a meaningful view into how customers are interacting with brand assets and how they are buying.

Likewise, integrated capabilities that are process-based appear to benefit from having a single dashboard; successful campaign timing and brand experience have a great deal to do with having assets readily available and easy to field across multiple platforms on a schedule.

It's important to note that isn't possible to tease out all of the variables that contribute to the success highlighted in the chart above. Some of the difference we see in particular activities is likely to have to do with the nature of the marketing organization and its existing capabilities.

For example, having a unified data structure is a precursor to moving to a marketing integration platform for many companies, which then increases their self-evaluation of "data" as a capability.

Having the right tools is only part of the solution to the tougher problems of integration. Even among companies with integrated platforms, only 11% give top grades to their ability to deliver "user experience" across channels and platforms. That's better than the 6% of those using other techs but a long way from where the industry needs to be.

5.3. For the best integrated marketers, it's not about algorithms

Table 3: How would you rank the challenges that you've encountered in deploying integrated marketing?

	Sophisticated	Mainstream
Management support/resources	1	2
Cross-media creativity	2	5
Unifying technology	3	3
Strategy	4	1
Unifying and sharing customer data	5	4
International issues	6	7
Unifying and sharing brand assets	7	6

N=493

When we looked at the differences in how marketers viewed their integrated marketing challenges, the most interesting was around their views on cross-media creativity. As we read the data, it suggests that as organizations mature, they get past the trials of technology and data, of process and politics. When they've done so, they're left with the original problem of marketing – how to engage and inspire customers with ideas and images.

Of course, digital adds some wrinkles to this challenge, because “creative” doesn't just mean a TV commercial with complimentary print ads. It means all that, plus a multiplicity of paid, earned and owned campaign elements across three major types of devices.

Unfortunately, even paid creative doesn't port well from one environment to another, let alone social/earned media. On the other hand, good ideas themselves are not just portable but aggressively viral. That's the essential challenge and opportunity the sophisticated organizations are grappling with.

The mainstream puts creative into the bottom half of challenges, because they're preoccupied with the plumbing of integrated marketing and digital marketing in general. What will be stored and where? How will we segment? Can we apply what we know about a customer in one channel to another? How do we tune our media mix as it becomes more complex?

It's easy to see why creative can be an afterthought. But that's a mistake. All of the algorithms, processors and hi-def screens are simply vessels for ideas and the images that capture them.

The trope “right ad to the right person at the right time” is often used to describe modern marketing. In the quest to perfect capabilities in identifying the right person and the right time, many companies aren't devoting their time and money to what's arguably the most important piece – the idea that makes it the “right” ad (or piece of content).

6. The Road Ahead

The last decade or so in digital marketing has been defined by innovation. Every headline or tweet introduced marketers to a new platform, channel or device...in other words, a new responsibility. The pace of and variety of change left marketers with more questions than answers and even less time.

Innovation is a new constant to the physics of marketing, but it's inefficient for organizations to exist in a state of reactivity. They've spent the last decade internally focused, asking the question "what is marketing?" in the context of the digital shift. Looking at a variety of factors, there's reason to think that the question is shifting to "how do I make it all work together...how do I integrate?"

The consolidation of technologies through acquisition and merger is one clear signal that the industry's focus is moving to making use of the new tools for marketing instead of tracking their evolution. New point solutions will continue to bubble to the surface, but they'll be designed from the outset to fit with the marketing cloud solutions, or never get funded in the first place.

Media consumption habits are also more predictable than they were, because the industry has had years to learn. The devices and platforms will multiply and evolve, but marketers have a better understanding of how mobility and fragmentation affect their customers and prospects than ever before.

But the primary reason that marketing is ready to stop worrying about what's around the corner and get back to focusing on selling is simply that the industry has grown up. A deep digital background is standard at the middle levels of management and becoming more common for senior staff in many sectors. The punches will keep coming but marketers are increasingly prepared to roll with them.

Transformation is a tall order, and a difficult condition to define. The Integrated Marketing Study suggests at least an end result. Once companies have done the hard work to lower silo walls, have built digital skills and mastered the technology and data pieces...they get back to creative, the powerful ideas that define our brands and our customer relationships.

What are the most significant effects of integrated marketing?

"Coordinating offline efforts (TV, print, etc.) with online inbound digital tactics (SEO, social, etc.) has significantly increased conversion rates for our consumer clients and lead-to-close ratios for our B2B clients."

"Integrated Marketing opens the doors to an unparalleled volume of new customers. Gone are the days of creating a product based solely on what the brand believes the customer wants, with the integration of digital marketing, brands are being shaped faster by their customers."

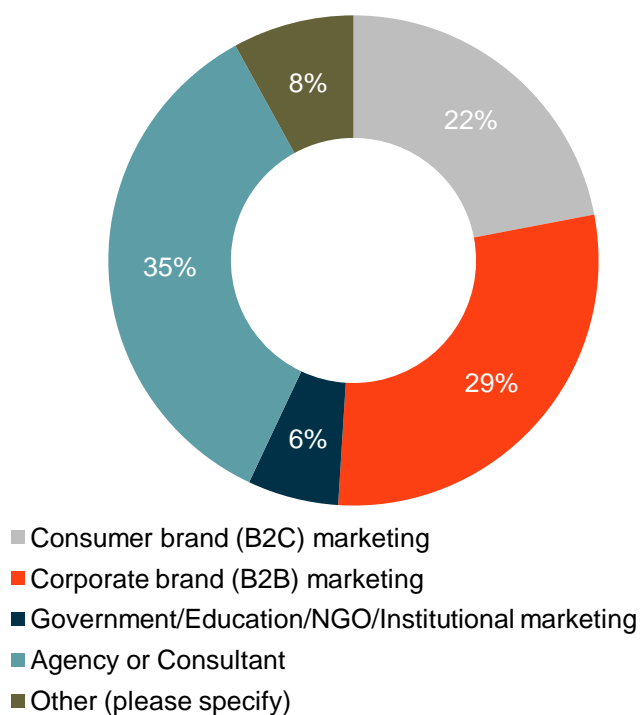
"We've seen a lift in PPC from social media, return traffic to our website from visitors whose first exposure to us was in Facebook and Twitter, a breaking down of inter-departmental silos and better internal communication"

"Speed of execution, ability to improve performance cross acquisition and retention efforts, clear ROI and attribution of marketing channels to sales."

Survey respondents

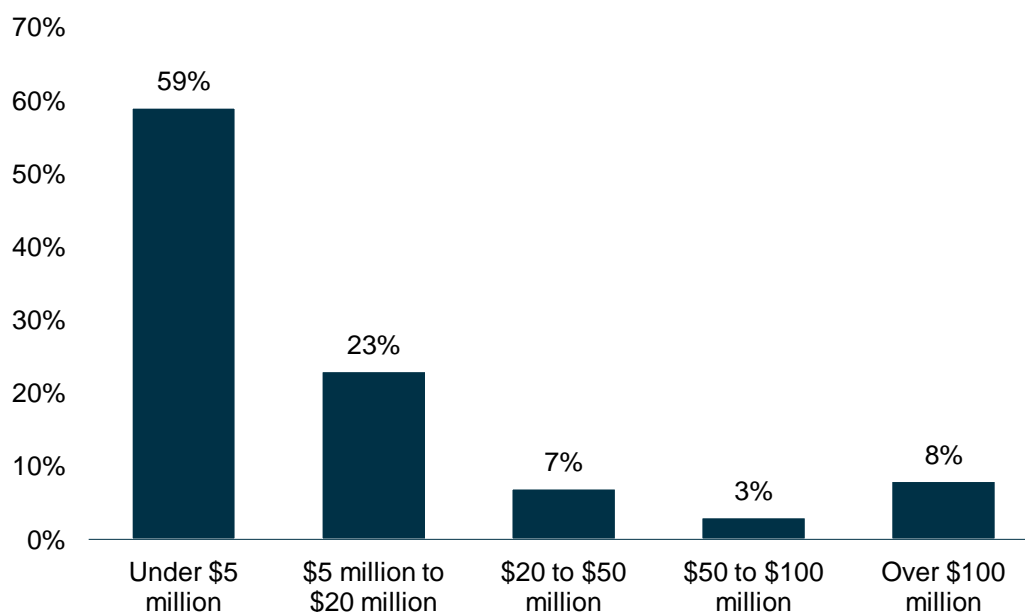
7. Appendix: Respondent Profiles

Figure 7: Which of the following best describes your organization?



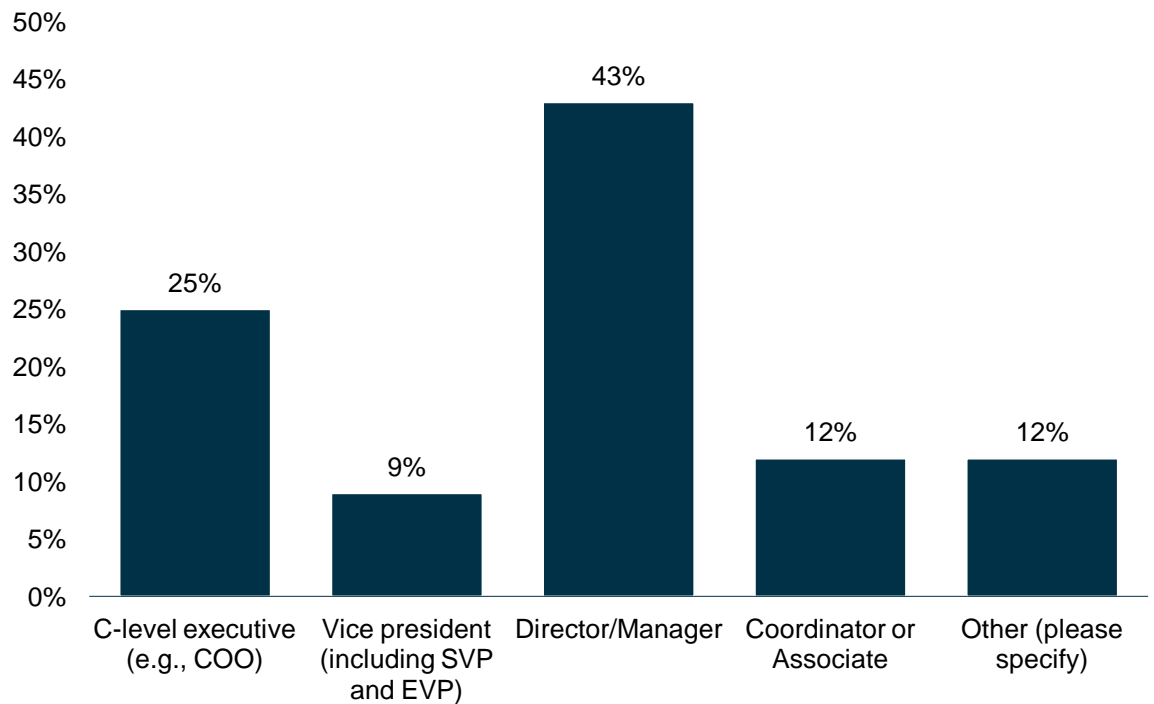
N=1,048

Figure 8: What did your organization spend on marketing in 2012?



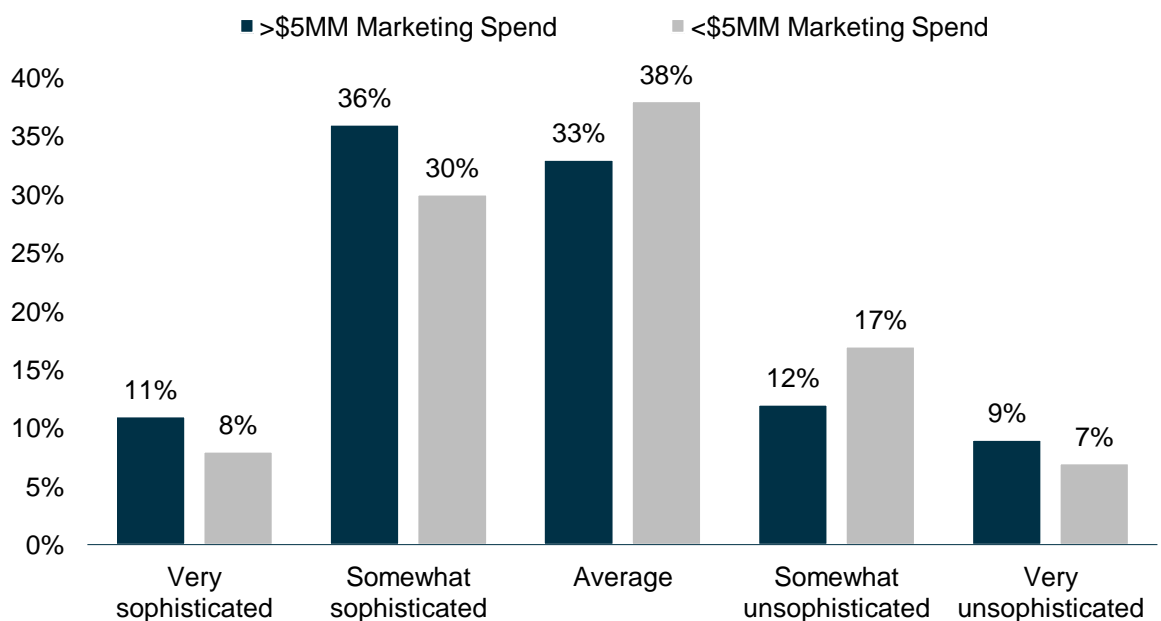
N=685

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



N=1,045

Figure 10: How sophisticated is your organization in its integrated marketing efforts?



N=685