



# 2016 Australian Senior Marketer Monitor





## 2016 Australian Senior Marketer Monitor

Since 2009 the Australian Marketing Institute (AMI) has worked in partnership with Colmar Brunton to conduct an annual study of Australia's senior marketing professionals.

We are pleased to present the outcomes of the 2016 Australian Senior Marketers Monitor: the results of which provide insight into the sentiment, priorities and perspectives of senior marketers, the challenges faced in the current marketing environment, and how this has changed over time.



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## 2016 Australian Senior Marketer Monitor: Key Themes



### Outlook: Role and Influence of Marketing

- While senior marketers are consistently optimistic about the role and influence of marketing within their own organisations (both overall and strength of this optimism), a decline is apparent in the proportion of senior marketers who are 'very positive' about the role and influence of marketing in Australia
- This result indicates that while the challenges facing the industry as a whole are increasing, marketers feel that within their own organisations they are able to effect positive change and growth.

### Outlook: Marketing budgets

- Just under one third (32%) of senior marketers expect their marketing budget to increase in 2015, 25% expect a decrease and 43% expect their budget to stay the same.
- These expectations show that senior marketers are less optimistic about budget expectations compared to last year when 44% expected budgets to increase and only 20% to decrease.



## Outlook: Marketing challenges

- Acquiring new customers, along with effectively getting the message to market, continue to be the key challenges overall for senior Australian marketers.
- Maintaining marketing budgets and measuring effectiveness also emerge as issues marketers see as being very challenging.



## Outlook: Marketing priorities

- Continuing the trend of prior years, the development of customer and market insights, measures to increase sales, maximising marketing expenditure efficiency and customer acquisition emerge as being the priority areas on which there has been the most increased focus.
- Focus on identification of marketing talent, programmatic media buying, direct competitors and collaboration with finance and procurement have had the biggest decline in prioritisation.



## Outlook: Communications Channels

- Use of content and social media has increased in 2015 for at least seven out of 10 organisations, usage of content marketing for just over six out of every 10 (62%) organisations and usage of SEO by just under six out of every 10 (58%) organisations.
- Usage of sponsorships is however mixed with just over one quarter (28%) of senior marketers increasing usage of this channel and just under one quarter (23%) decreasing.
- Strong decreases are apparent in usage of print (-50%), direct mail (-30%) and radio (-27%).



# FINDINGS IN DETAIL

## Key areas of focus

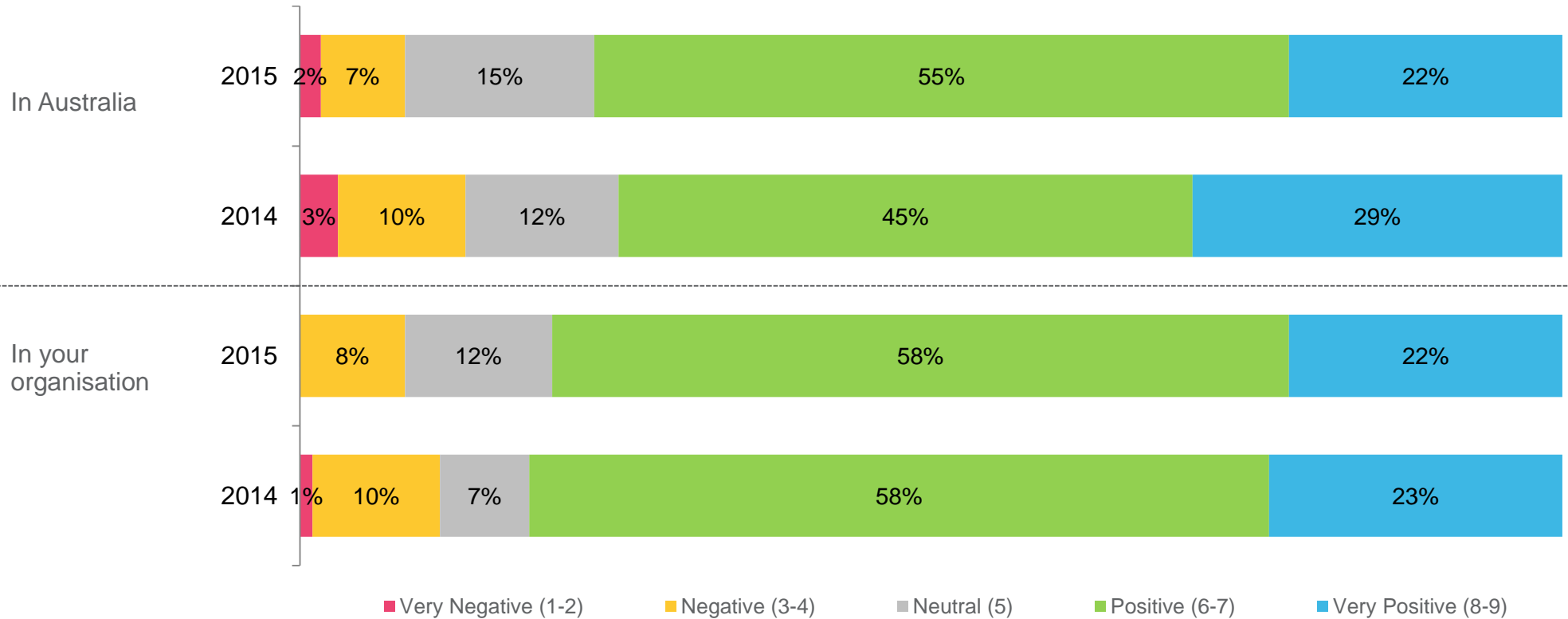
- Role and influence of marketing
- Budget expectations
- Marketing priorities
- Marketing challenges
- Marketing channels





## Role and influence of marketing:

- While overall levels of positivity about the role and influence of marketing in Australia year on year has remained relatively consistent, the proportion of senior marketers who are very positive has declined.
- However the level of optimism that about the role and influence of marketing within their own organisations has remained consistent; both overall and with regard to level of optimism.



Q1. How do you feel about the role and influence of marketing in Australia organisations today?

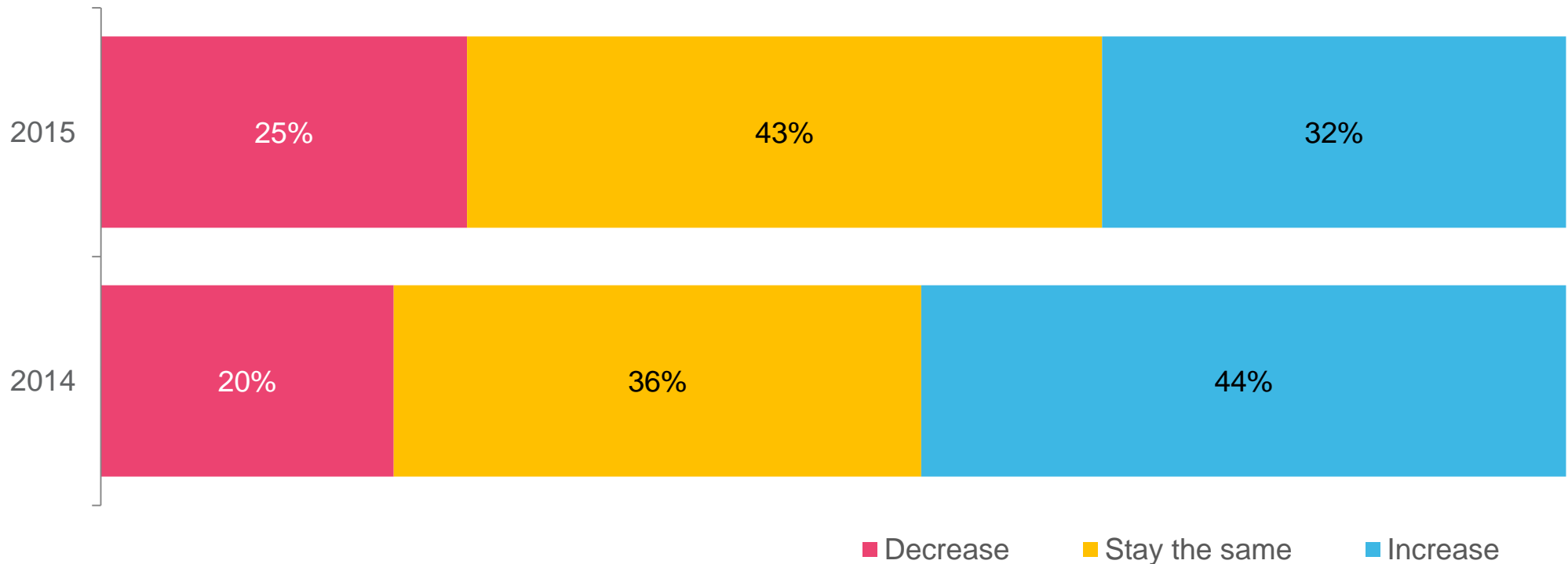
Q2. How do you feel about the role and influence of your marketing department/team in your organisation today?



## Budget expectations:

- Just under one third (32%) of senior marketers expect their marketing budget to increase in 2015, 25% expect a decrease and 43% expect their budget to stay the same.
- These expectations show that senior marketers are less optimistic about budget expectations compared to last year when 44% expected budgets to increase and only 20% to decrease.

Marketing Budget Changes - Employee Size



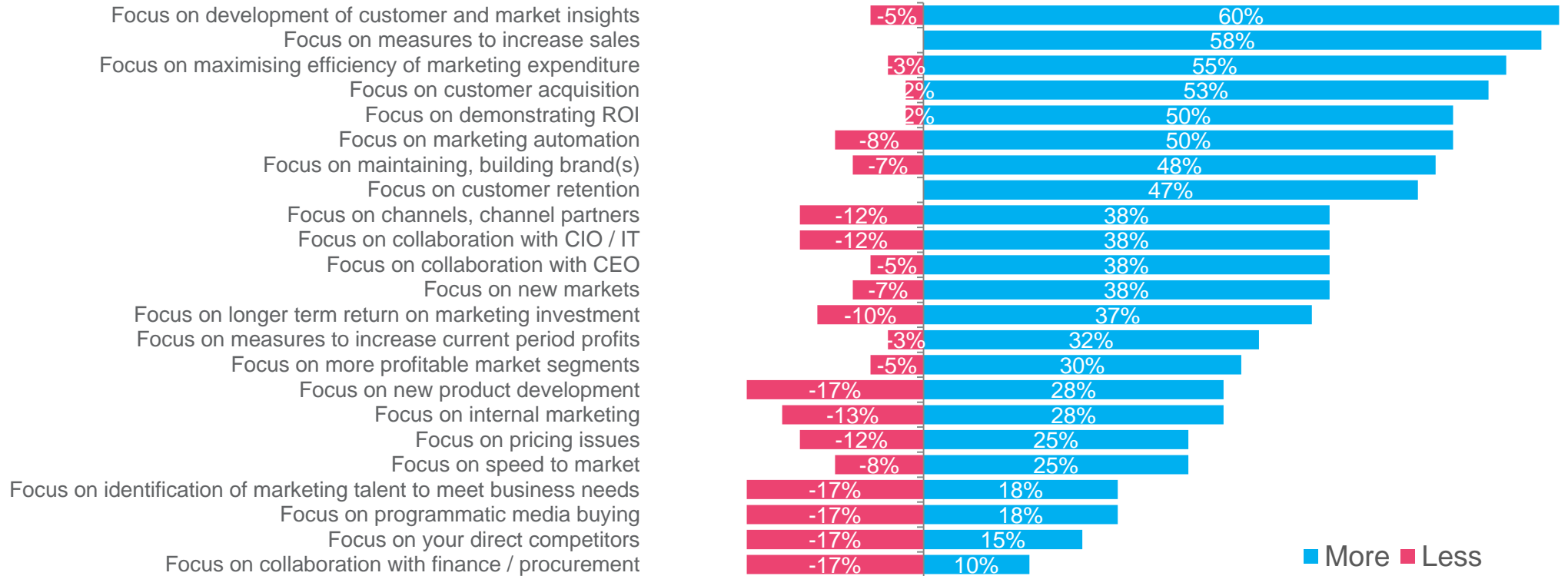
Q3A. In 2015, how do you expect your marketing budget to change from 2014? Do you expect it to?



## Marketing priorities:

- Continuing the trend of prior years, the development of customer and market insights, measures to increase sales, maximising marketing expenditure efficiency and customer acquisition emerge as being the priority areas on which there has been the most increased focus..
- Focus on identification of marketing talent, programmatic media buying, direct competitors and collaboration with finance and procurement have had the biggest decline in prioritisation.

### Marketing Priorities



Q4. Have your marketing priorities shifted in the past 12 months?

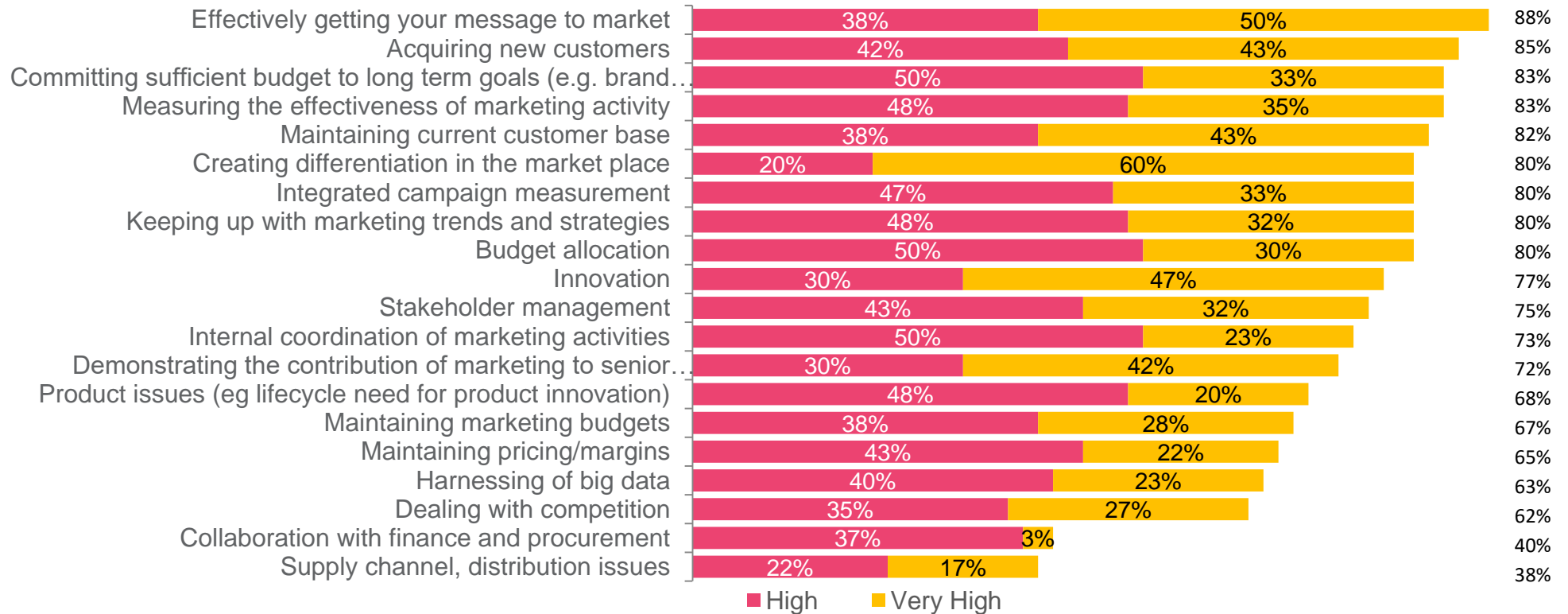




## Major marketing challenges:

- Effectively getting the message to market, along with acquiring new customers, continue to be the top two major challenges for senior Australian marketers.
- Committing budget to long term foals and measuring the effectiveness of marketing activity are also key challenges.

### Marketing challenges



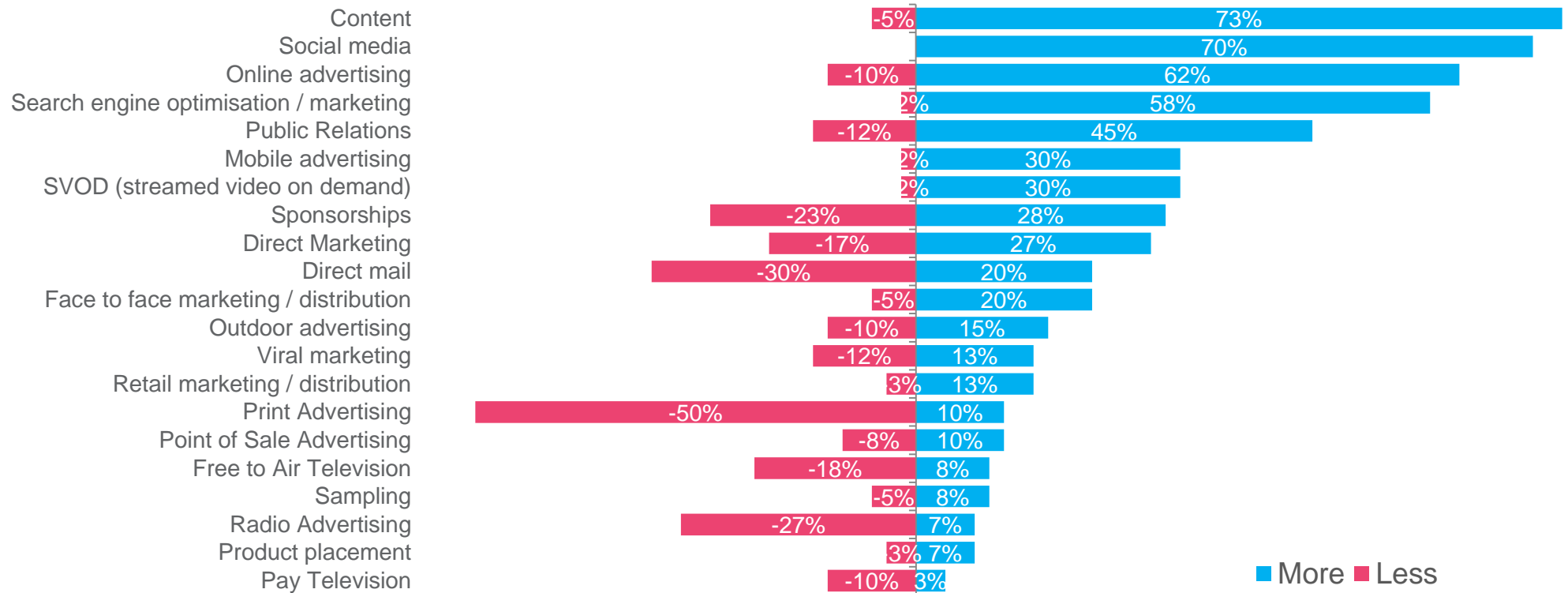
Q5. What are the major marketing challenges you are facing in your organisation today



## Marketing channels:

- Use of content and social media has increased in 2015 for at least seven out of 10 organisations, usage of content marketing for just over six out of every 10 (62%) organisations and usage of SEO by just under six out of every 10 (58%) organisations.
- Usage of sponsorships is mixed: just over one quarter (28%) of senior marketers have increased usage of this channel and just under one quarter (23%) decreased.
- Strong decreases are apparent in usage of print (-50%), direct mail (-30%) and radio (-27%).

### Marketing Channels



Q4. Have your marketing priorities shifted in the past 12 months?



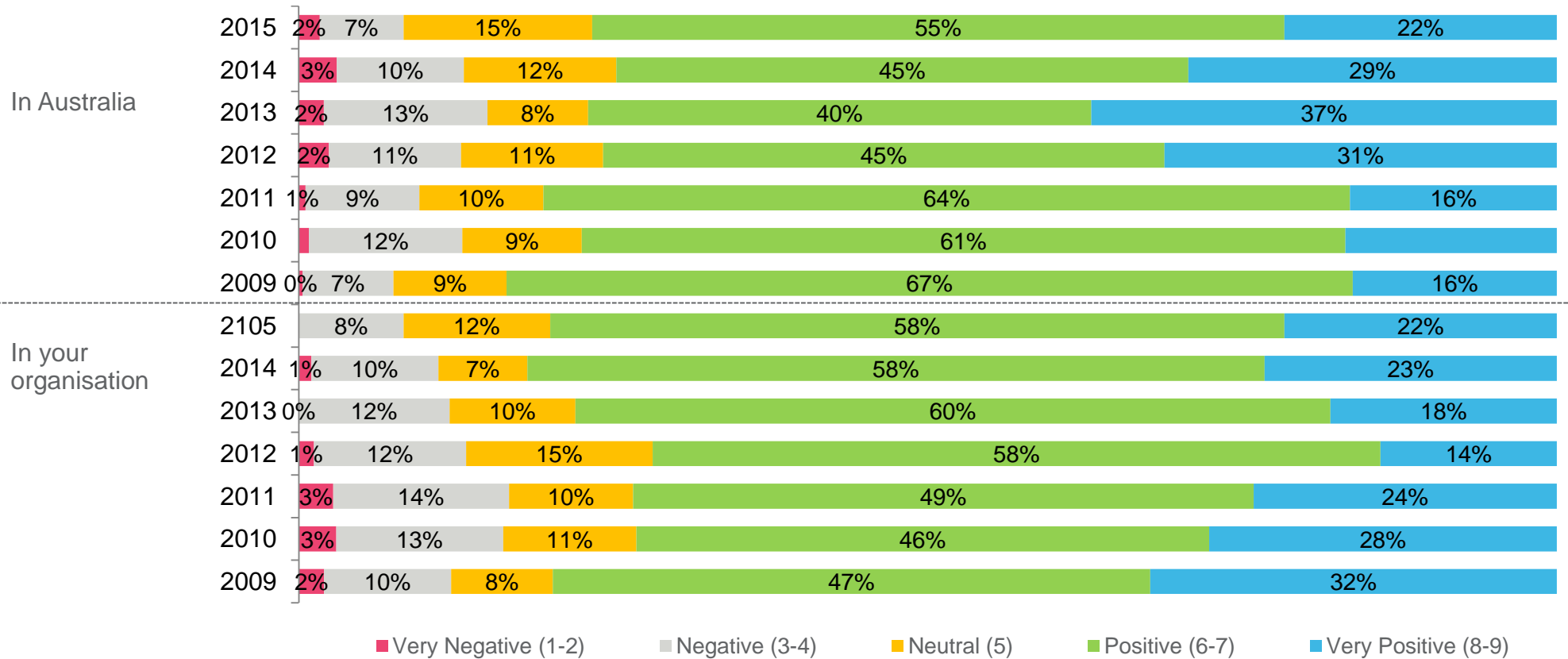
# HISTORICAL TIME SERIES





## Role and influence of marketing:

- Q1. How do you feel about the role and influence of marketing in Australia organisations today?
- Q2. How do you feel about the role and influence of your marketing department/team in your organisation today?

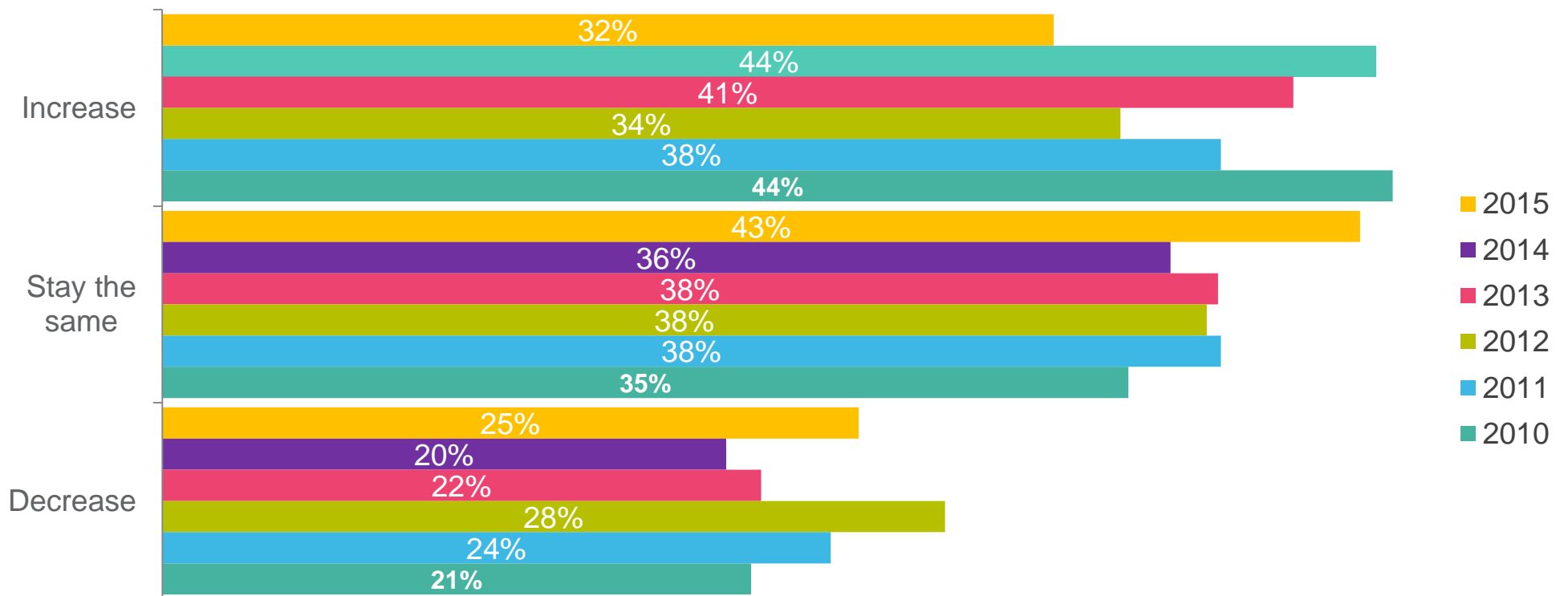




## Budget expectations:

- Q3A. In 2015, how do you expect your marketing budget to change from 2014? Do you expect it to...?

### Marketing Budget Changes - Total





## Marketing priorities:

- Q4. Have your marketing priorities shifted in the past 12 months?

|  | 2009 Focus |      | 2010 Focus |      | 2012 Focus |      | 2013 Focus |      | 2014 Focus |      | 2015 Focus |      |
|--|------------|------|------------|------|------------|------|------------|------|------------|------|------------|------|
|  | More       | Less | More       | Less | More       | Less | More       | Less | More       | Less | More       | Less |
| Development of customer and market insights    | -          | -    | -          | -    | -          | -    | -          | -    | 49%        | -7%  | 60%        | -5%  |
| Measures to increase sales                     | 65%        | -2%  | 58%        | -2%  | 63%        | -2%  | 65%        | -2%  | 61%        | -3%  | 58%        | 0%   |
| Maximising efficiency of marketing expenditure | 68%        | -2%  | 61%        | -2%  | 58%        | -3%  | 53%        | -3%  | 52%        | 5%   | 55%        | -3%  |
| Customer acquisition                           | 56%        | -8%  | 46%        | -6%  | 49%        | -7%  | 57%        | -7%  | 62%        | -6%  | 53%        | -2%  |
| Focus on demonstrating ROI                     | -          | -    | -          | -    | -          | -    | -          | -    | 47%        | -6%  | 50%        | -2%  |
| Marketing automation                           | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 50%        | -8%  |
| Maintaining, building brand(s)                 | 50%        | -8%  | 52%        | -6%  | 47%        | -11% | 43%        | -8%  | 39%        | -15% | 48%        | -7%  |
| Customer retention                             | 58%        | -2%  | 45%        | -4%  | 45%        | -4%  | 46%        | -4%  | 46%        | -4%  | 47%        | 0%   |
| Channels, channel partners                     | 39%        | -8%  | 45%        | -6%  | 34%        | -7%  | 44%        | -8%  | 33%        | -11% | 38%        | -12% |
| Focus on collaboration with CEO                | -          | -    | -          | -    | -          | -    | -          | -    | 23%        | -7%  | 38%        | -5%  |
| Focus on collaboration with CIO / IT           | -          | -    | -          | -    | -          | -    | -          | -    | 28%        | -10% | 38%        | -12% |
| New markets                                    | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 38%        | -7%  |
| Longer term return on marketing investment     | 33%        | -18% | 27%        | -14% | 29%        | -17% | 24%        | -15% | 29%        | -15% | 37%        | -10% |
| Measures to increase current period profits    | 47%        | -2%  | 37%        | -3%  | 47%        | -3%  | 44%        | -5%  | 42%        | -5%  | 32%        | -3%  |
| More profitable market segments                | 52%        | -2%  | 50%        | -2%  | 51%        | -3%  | 55%        | -3%  | 44%        | -4%  | 30%        | 5%   |
| Internal marketing                             | 33%        | -16% | 33%        | -19% | 28%        | -20% | 25%        | -19% | 23%        | -23% | 28%        | -13% |
| New product development                        | 43%        | -19% | 46%        | -9%  | 42%        | -12% | 38%        | -15% | 33%        | -15% | 28%        | -17% |
| Pricing issues                                 | 47%        | -8%  | 35%        | -9%  | 36%        | -5%  | 29%        | -9%  | 32%        | -9%  | 25%        | -12% |
| Speed to market                                | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 25%        | -8%  |
| Identifying marketing talent to meet needs     | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 18%        | -17% |
| Programmatic media buying                      | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 18%        | -17% |
| Your direct competitors                        | 23%        | -14% | 18%        | -15% | 16%        | -16% | 18%        | -22% | 10%        | -21% | 15%        | -17% |



## Major marketing challenges:

- Q5. What are the major marketing challenges you are facing in your organisation today?

|  | 2009 Level |         | 2010 Level |         | 2011 Level |         | 2012 Level |         | 2013 Level |         | 2014 Level |         | 2015 Level |         |
|--|------------|---------|------------|---------|------------|---------|------------|---------|------------|---------|------------|---------|------------|---------|
|  | High       | V. High | High       | V. High | High       | V. High | High       | V. High | High       | V. High | High       | V. High | High       | V. High |
| Effectively getting your message to market                             | 54%        | 35%     | 51%        | 37%     | 50%        | 39%     | 52%        | 38%     | 55%        | 37%     | 48%        | 38%     | 38%        | 50%     |
| Acquiring new customers  | 45%        | 39%     | 47%        | 30%     | 52%        | 35%     | 34%        | 50%     | 58%        | 27%     | 58%        | 38%     | 42%        | 43%     |
| Committing sufficient budget to long term goals                        | 27%        | 46%     | 30%        | 40%     | 28%        | 42%     | 25%        | 42%     | 25%        | 40%     | 40%        | 32%     | 50%        | 33%     |
| Measuring effectiveness of marketing activity                          | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 48%        | 35%     |
| Maintaining current customer base                                      | 51%        | 36%     | 40%        | 36%     | 46%        | 36%     | 38%        | 45%     | 48%        | 38%     | 40%        | 42%     | 38%        | 43%     |
| Budget allocation  | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 50%        | 30%     |
| Creating differentiation in the market place                           | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 20%        | 60%     |
| Integrated campaign measurement  | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 38%        | 34%     | 47%        | 33%     |
| Keeping up with marketing trends and strategies                        | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 48%        | 32%     |
| Innovation   | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 47%        | 30%     | 30%        | 47%     |
| Stakeholder management   | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 30%        | 38%     | 43%        | 32%     |
| Internal coordination of marketing activities                          | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 50%        | 23%     |
| Demonstrating the contribution of marketing to senior management/Board | 36%        | 42%     | 34%        | 38%     | 38%        | 38%     | 34%        | 35%     | 34%        | 36%     | 40%        | 31%     | 30%        | 42%     |
| Product issues   | 30%        | 38%     | 28%        | 40%     | 29%        | 41%     | 26%        | 35%     | 27%        | 39%     | 26%        | 37%     | 48%        | 20%     |
| Maintaining marketing budgets  | 29%        | 45%     | 30%        | 38%     | 31%        | 39%     | 29%        | 37%     | 28%        | 36%     | 25%        | 40%     | 38%        | 28%     |
| Maintaining pricing/margins  | 37%        | 37%     | 31%        | 33%     | 33%        | 36%     | 39%        | 31%     | 35%        | 35%     | 37%        | 29%     | 43%        | 22%     |
| Harnessing of big data   | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 27%        | 36%     | 40%        | 23%     |
| Dealing with competition   | 24%        | 39%     | 22%        | 37%     | 24%        | 38%     | 18%        | 40%     | 21%        | 41%     | 18%        | 39%     | 35%        | 27%     |
| Collaboration with finance and procurement                             | -          | -       | -          | -       | -          | -       | -          | -       | -          | -       | 9%         | 25%     | 37%        | 3%      |
| Supply channel, distribution issues                                    | 20%        | 35%     | 18%        | 39%     | 20%        | 32%     | 18%        | 34%     | 20%        | 35%     | 17%        | 29%     | 22%        | 17%     |



## Marketing channels:

- Q6 *Have your usage of communication channels changed in the past 12 months?*

|  | 2009 Usage |      | 2010 Usage |      | 2011 Usage |      | 2012 Usage |      | 2013 Focus |      | 2014 Usage |      | 2015 Usage |      |
|--|------------|------|------------|------|------------|------|------------|------|------------|------|------------|------|------------|------|
|  | More       | Less | More       | Less | More       | Less | More       | Less | More       | Less | More       | Less | More       | Less |
| Content                                | -          | -    | -          | -    | -          | -    | -          | -    | 49%        | -4%  | 62%        | -3%  | 73%        | -5%  |
| Social media                           | 61%        | -6%  | 71%        | -2%  | 77%        | -2%  | 66%        | -2%  | 63%        | -4%  | 74%        | -2%  | 70%        | 0%   |
| Online advertising                     | 63%        | -9%  | 64%        | -5%  | 64%        | -4%  | 56%        | -4%  | 52%        | -7%  | 72%        | -1%  | 62%        | -10% |
| Search engine optimisation / marketing | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 57%        | -34% | 58%        | -2%  |
| Public Relations                       | 46%        | -10% | 44%        | -10% | 47%        | -10% | 34%        | -13% | 31%        | -12% | 31%        | -14% | 45%        | -12% |
| Mobile advertising                     | 34%        | -13% | 35%        | -9%  | 46%        | -7%  | 30%        | -9%  | 26%        | -5%  | 29%        | -4%  | 30%        | -2%  |
| SVOD (streamed video on demand)        | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 30%        | -2%  |
| Sponsorships                           | 22%        | -34% | 22%        | -22% | 28%        | -25% | 22%        | -26% | 19%        | -26% | 22%        | -18% | 28%        | -23% |
| Direct Marketing                       | 50%        | -9%  | 41%        | -12% | 48%        | -11% | 38%        | -15% | 36%        | -12% | 34%        | -13% | 27%        | -17% |
| Direct mail                            | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 23%        | -40% | 20%        | -30% |
| Face to face marketing / distribution  | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 26%        | -55% | 20%        | -5%  |
| Outdoor advertising                    | 27%        | -31% | 28%        | -18% | 24%        | -23% | 11%        | -19% | 10%        | -17% | 10%        | -14% | 15%        | -10% |
| Retail marketing / distribution        | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 9%         | -34% | 13%        | -3%  |
| Viral marketing                        | 34%        | -9%  | 43%        | -6%  | 32%        | -9%  | 23%        | -8%  | 18%        | -11% | 20%        | -7%  | 13%        | -12% |
| Point of Sale Advertising              | 28%        | -14% | 31%        | -13% | 32%        | -11% | 20%        | -15% | 13%        | -10% | 12%        | -9%  | 10%        | -8%  |
| Print Advertising                      | 20%        | -38% | 19%        | -27% | 19%        | -35% | 12%        | -42% | 13%        | -10% | 12%        | -9%  | 10%        | -50% |
| Free to Air Television                 | 21%        | -35% | 23%        | -23% | 18%        | -28% | 8%         | -17% | 8%         | -12% | 12%        | -10% | 8%         | -18% |
| Sampling                               | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 8%         | -5%  |
| Product placement                      | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | -          | -    | 7%         | -3%  |
| Radio Advertising                      | 9%         | -37% | 18%        | -28% | 23%        | -23% | 8%         | -22% | 11%        | -17% | 7%         | -15% | 7%         | -27% |
| Pay Television                         | 22%        | -32% | 21%        | -19% | 18%        | -24% | 4%         | -16% | 7%         | -12% | 4%         | -9%  | 3%         | -10% |





# SAMPLE PROFILE





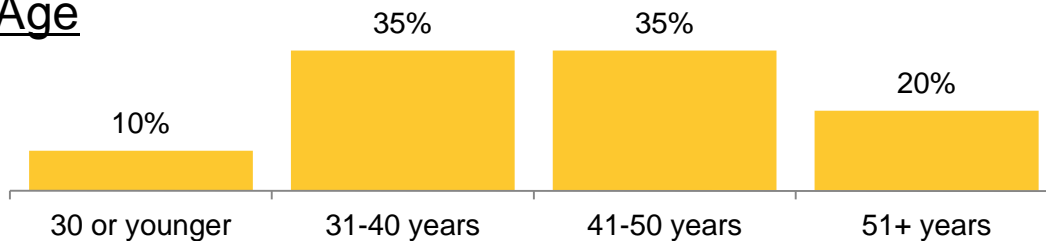
## Sample profile

- Conducted online, the inaugural study was administered in 2009 with the study then repeated in 2010, 2011, 2012, 2013, 2014 and again in 2015.
- 2015 fieldwork was conducted between 23rd November – 16<sup>th</sup> December 2015 with n=60 senior marketers participating.

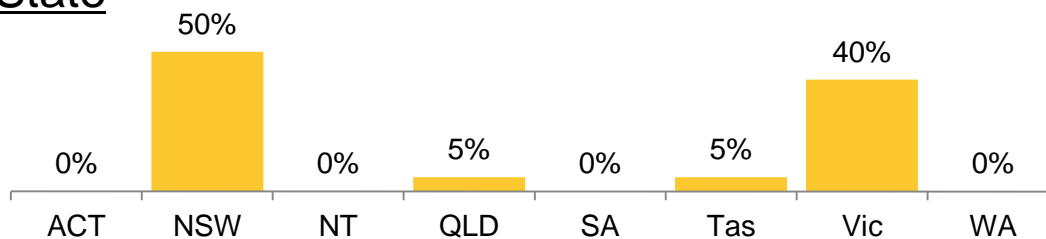
### Gender



### Age



### State



### Industry

