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# The B2B Marketing Outlook for 2010

Marketing Mix, Measurement and Return on Investment

Google/OTX

U.S., December 2009

# Research Objective:

Understand the B2B marketing outlook for 2010 and where marketers are focusing their budgets

- Discover how the economy has impacted B2B marketers
- Identify the barriers and opportunities for digital investment
- Understand the B2B marketing mix & assess B2B marketers' plans for 2010
- Analyze ROI of marketing tactics

Source: OTX study commissioned by Google, "2010 B2B Marketing Outlook" November 2009

# Research Methodology

**Methodology:** Online survey (Avg. time = 25 minutes)

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**Timing:** October 2<sup>nd</sup> to 29<sup>th</sup> 2009

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- Total sample of 637 business professionals within the Manufacturer, Retail and Services industries
- To qualify, the respondent had to be
  - Employed in a marketing or sales role as a Marketing Director/Manager (or higher) for a Manufacturer, Retailer or Services company
  - Develop or execute initiatives for their company
  - Influence or make marketing budget decisions
  - Focus their marketing efforts on business (versus consumers)
  - Manage at least one of the following marketing initiatives:
    - Brand Awareness
    - Customer Retention and Development
    - Customer Acquisition

# Agenda

**1** B2B Marketing in a Shifting Economy

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**2** Digital Opportunities and Barriers

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**3** Changes in the 2010 Marketing Mix

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**4** Measuring Return on Investment

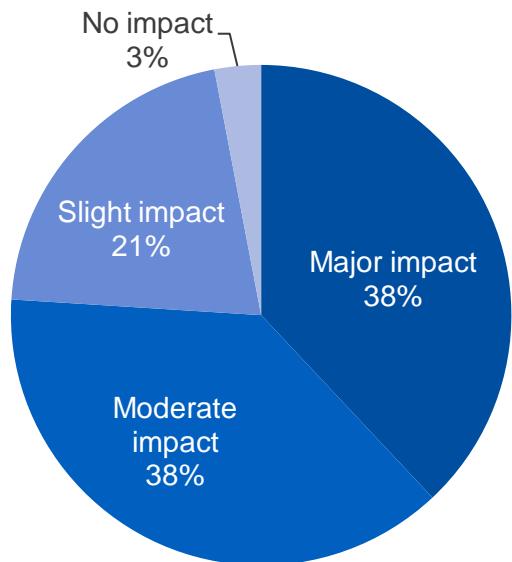
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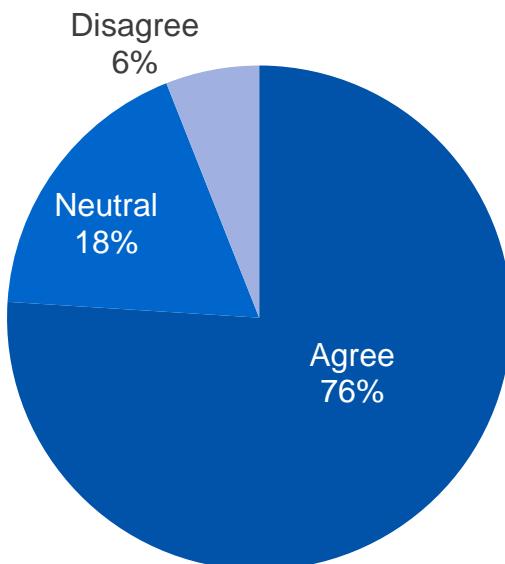
# B2B Marketing in a Shifting Economy

# B2B Marketers Feeling Effects of the Economy

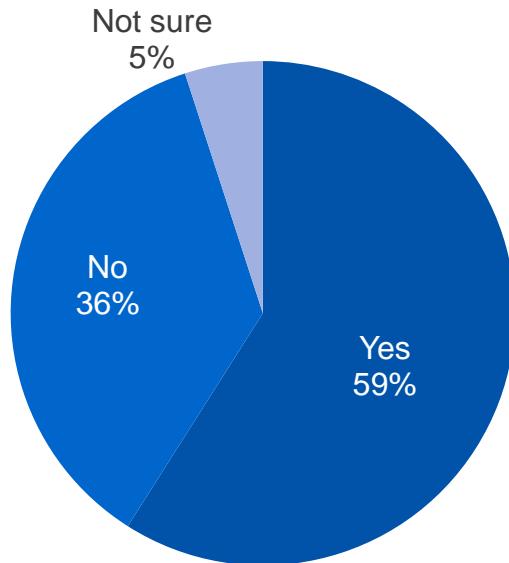
**97%** say the economy has affected their business



**76%** say the sales cycle has lengthened



**59%** are cutting budgets



Base: Total, n=637

(Q27A) How much of an impact has the current state of the economy on your business overall.

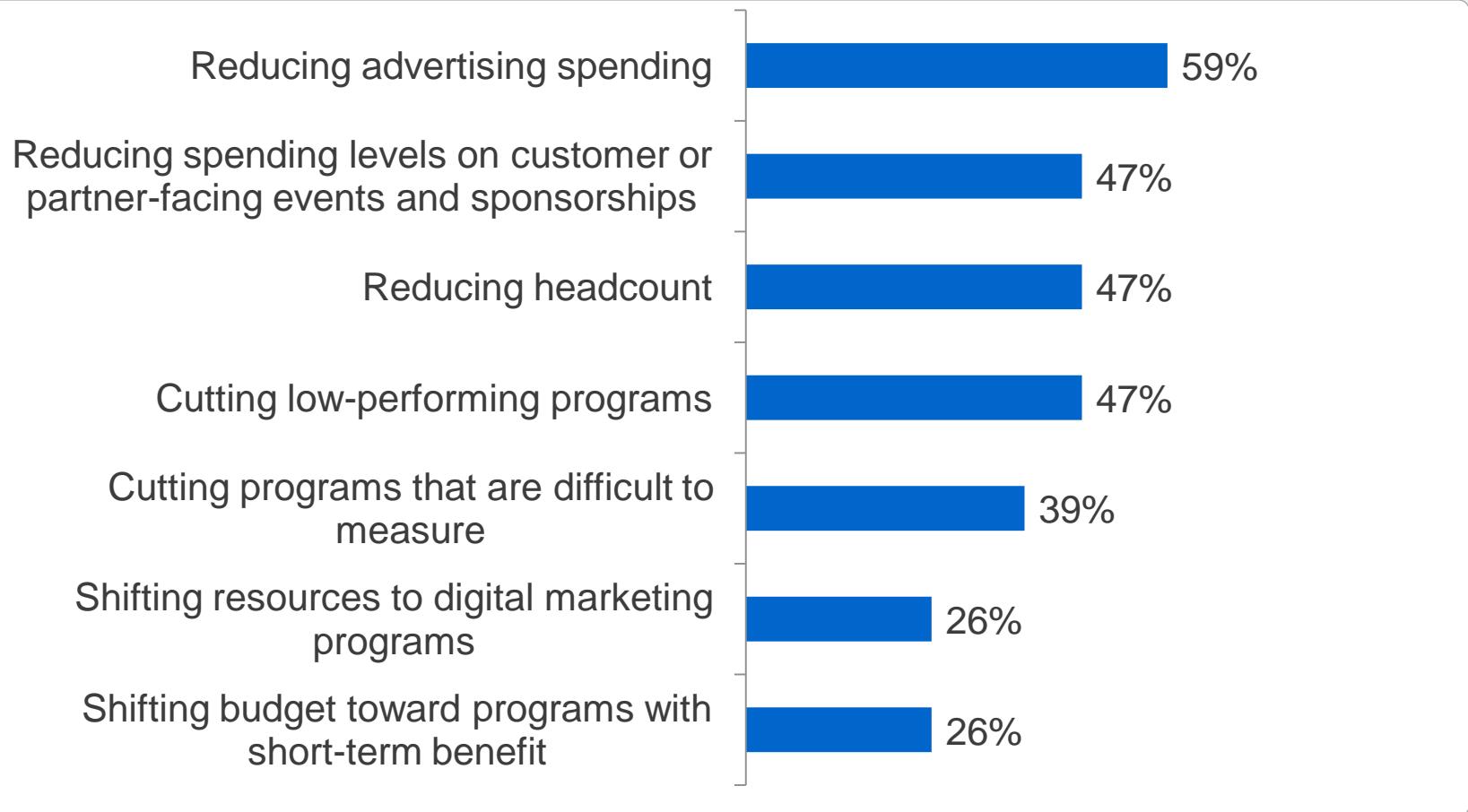
(Q29\_1) How much do you agree or disagree with the following statement? The B2B sales cycle has lengthened because of the economic climate

(Q27B) Is your company making marketing budget cuts due to the current state of the economy?

Source: OTX study commissioned by Google, "2010 B2B Marketing Outlook" November 2009

# Actions Taken to Reduce Marketing Costs

Advertising and event budgets cut the most

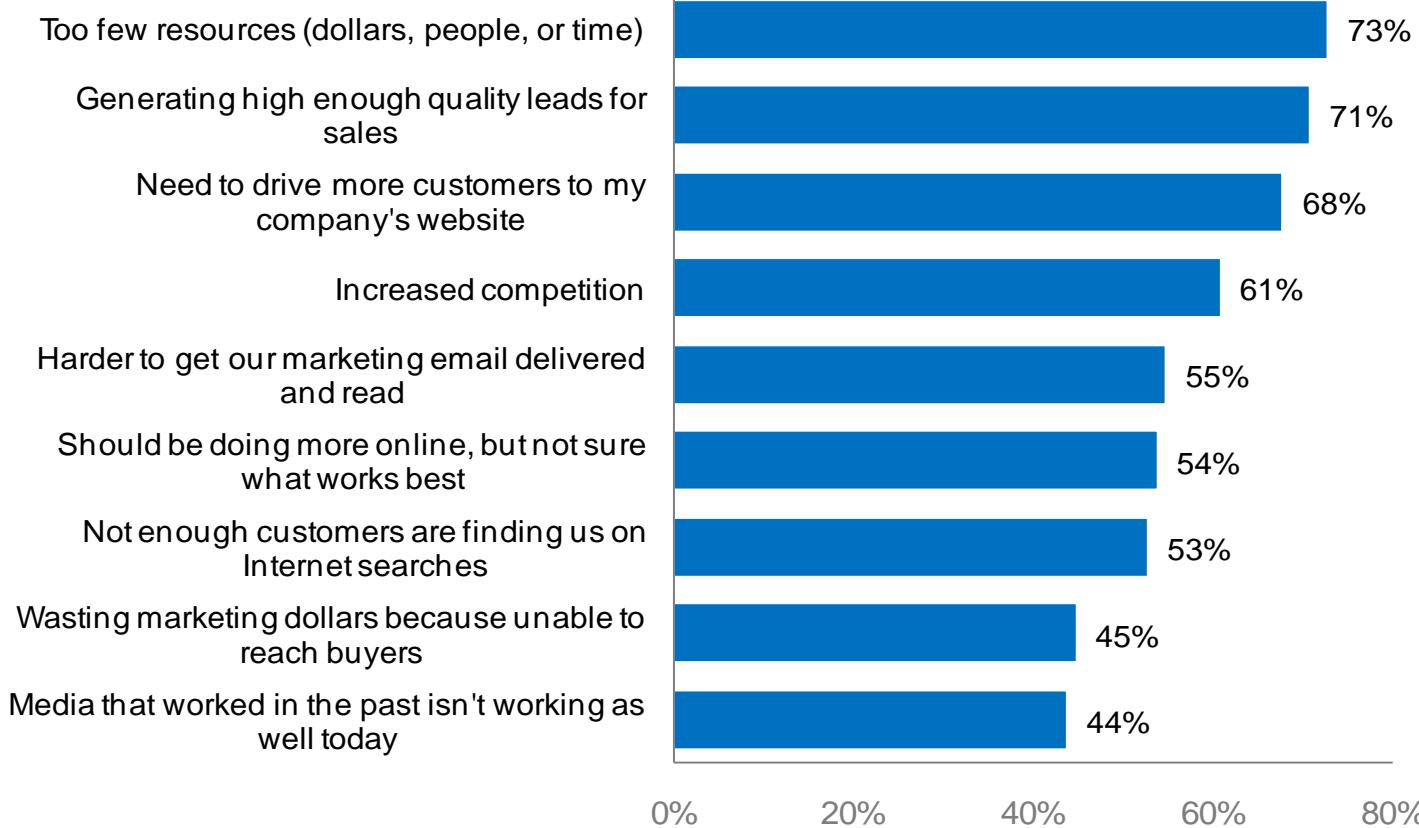


Base: Total, n=637

(Q28) What is your company doing to reduce marketing costs?

# Challenges Marketers are Facing Today

Lack of resources and lead generation challenges top the list



Base: Total, n=637

(Is Still a Challenge in 2009 Summary)

(Q15) What have been, or still are, your biggest marketing challenges in 2009?

# Looking Ahead to 2010

**64%** say  
marketing  
measurement  
will be more  
important



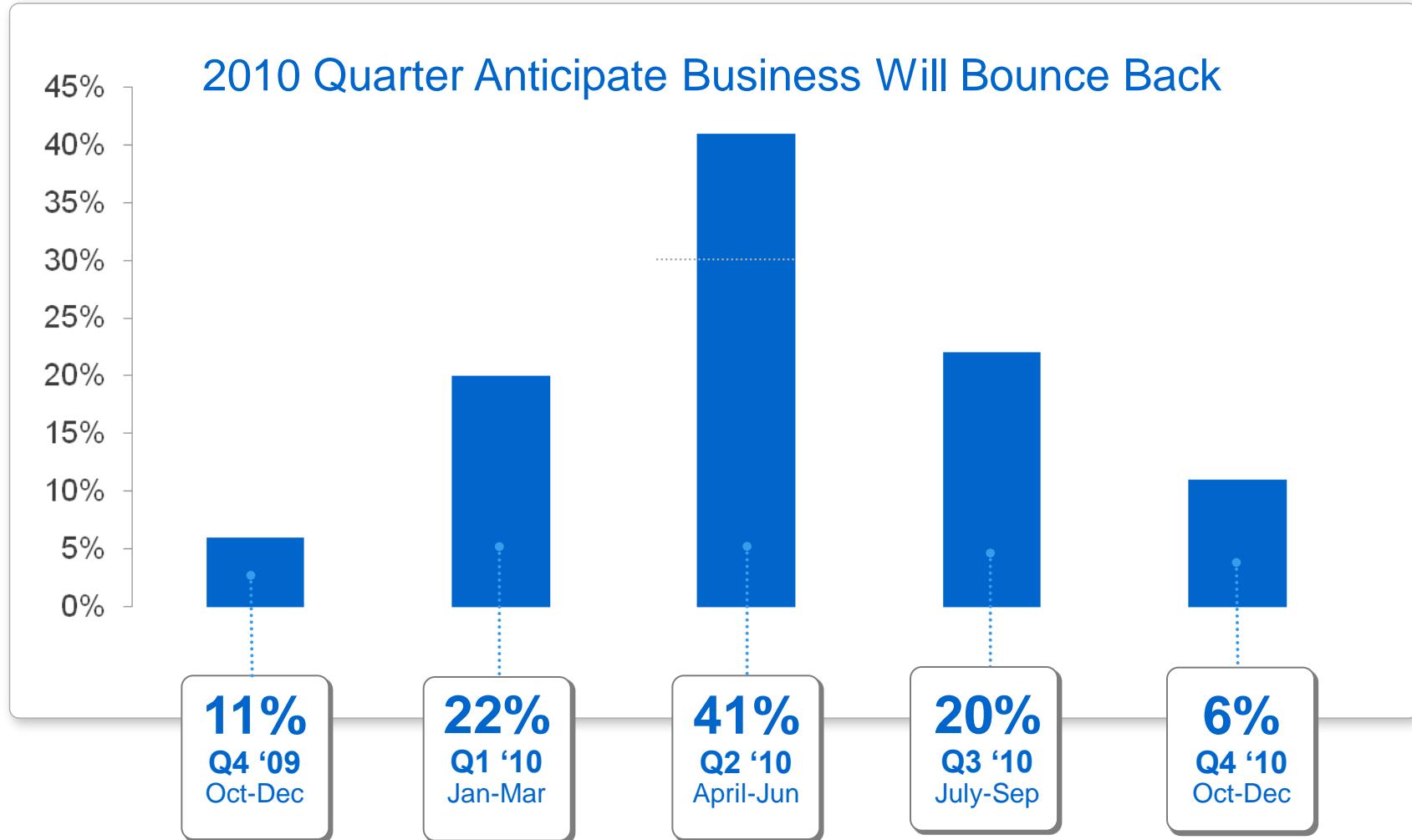
**55%** see  
benefits to  
investing more  
in digital



**36%** are  
increasing  
budgets for 2010



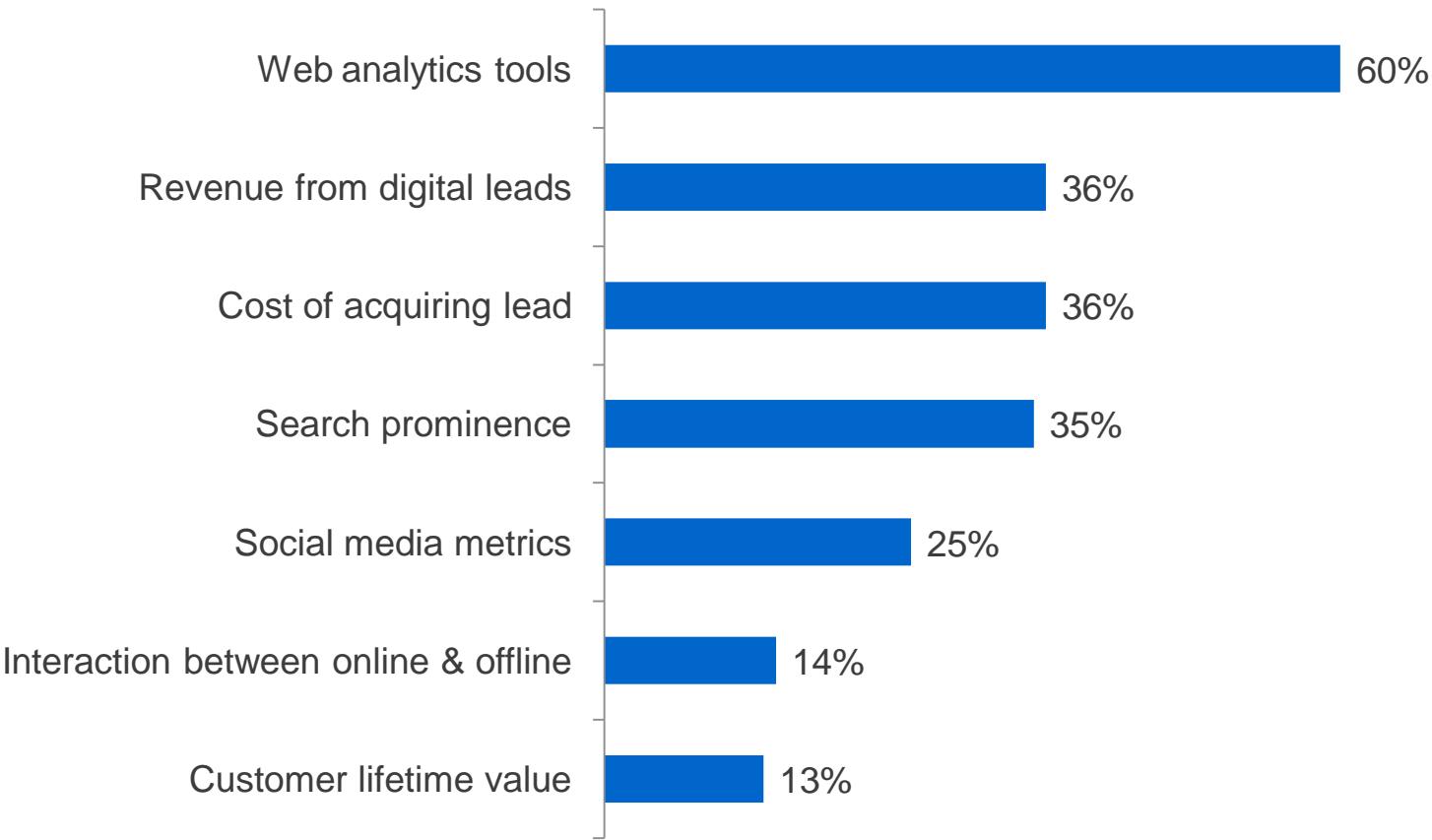
# Marketers Predict Return to Growth Q2 2010





# Digital Opportunities and Barriers

# Types of Data Used to Track Digital Marketing



Floating Base, 'Currently Implementing Digital Marketing Campaigns'  
(Q21B) Which of the following are you currently using to track your digital marketing efforts? (Select all that apply)

# Barriers to Development of Digital Marketing



Base: n=381 'Determinants of Need to Implement Digital Campaigns from Q20'  
(Q31) Which of the following have been barriers to your company's investment in digital marketing?

# Top Success Factors for Digital Marketing



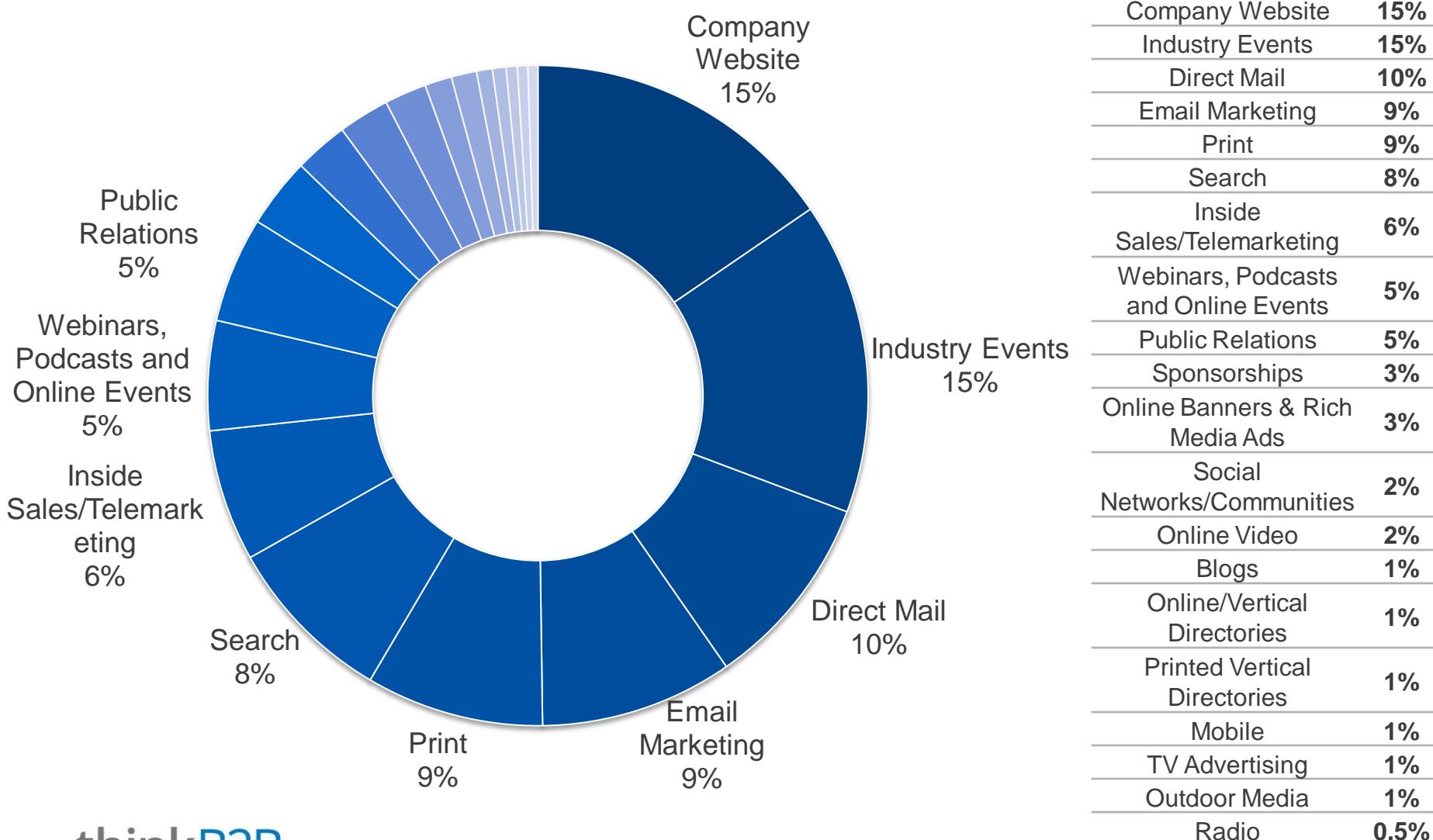
Total, n=637

(Q26A) In general, what factors do you believe are necessary to see positive results/ ROI with digital marketing tools/ practices vs. traditional methods? (Select all that apply)

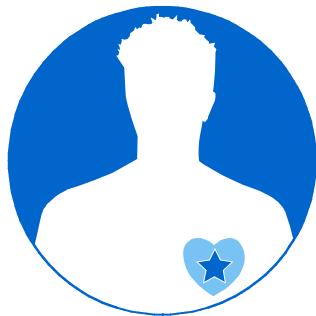


# Changes in the 2010 Marketing Mix

# 2009 Allocation of Marketing Budget by Tactic



# How Advertisers Are Using Marketing Tactics



## Branding

Outdoor media 81%

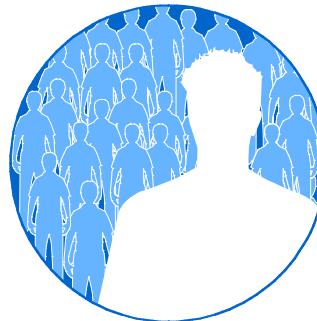
Sponsorships 78%

TV Advertising 78%

Public Relations 77%

Print 73%

Online banners/rich media ads 72%



## Acquisition

Inside sales/telemarketing 83%

Industry Events (i.e. tradeshows) 80%

Search 80%

Webinars Podcasts/Online Events 77%

Direct Mail 75%

Email marketing 75%



## Retention

Email marketing 61%

Webinars Podcasts/Online Events 59%

Direct Mail 58%

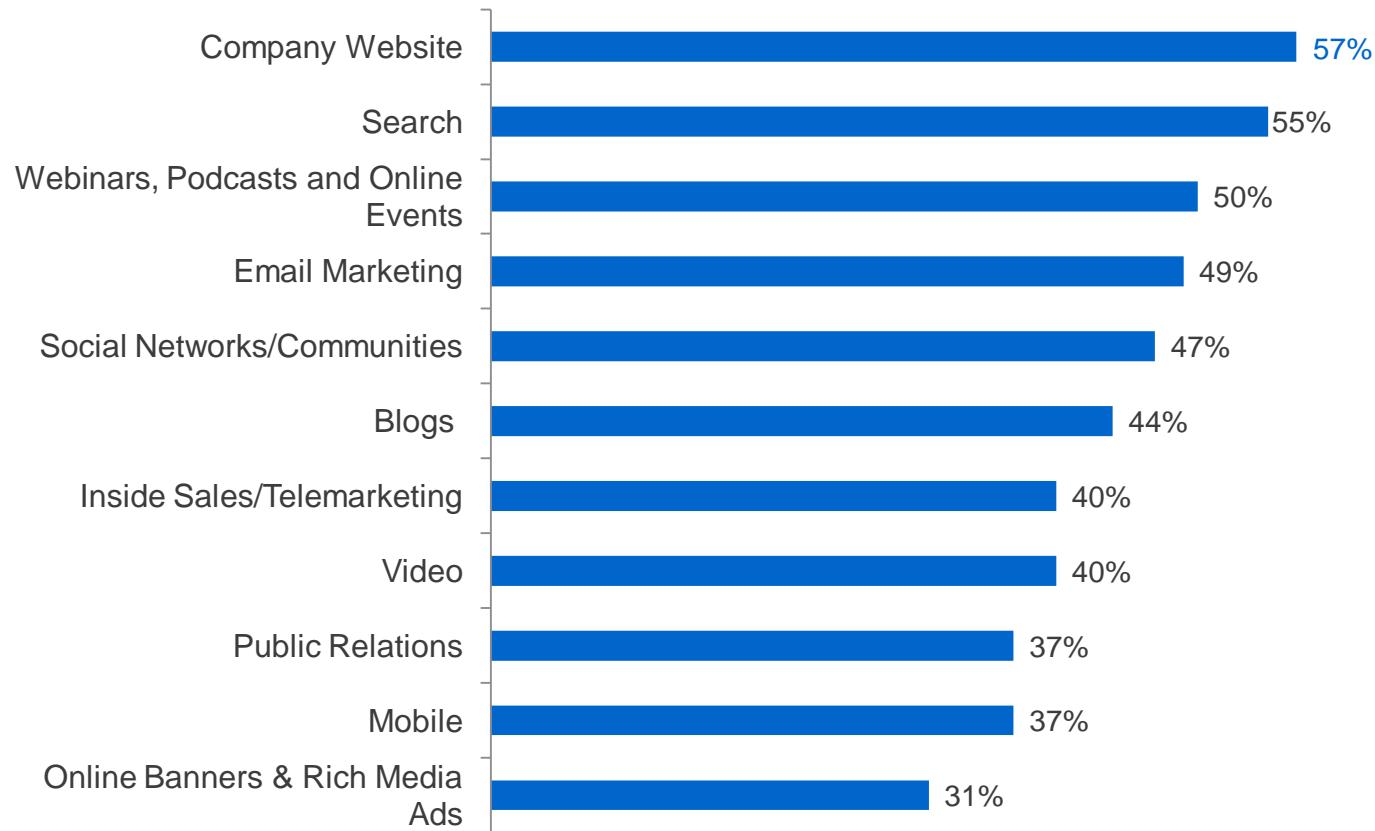
TV Advertising 53%

Company Website 52%

Industry Events (i.e. tradeshows) 50%

# Where Marketers are Increasing 2010 Spend

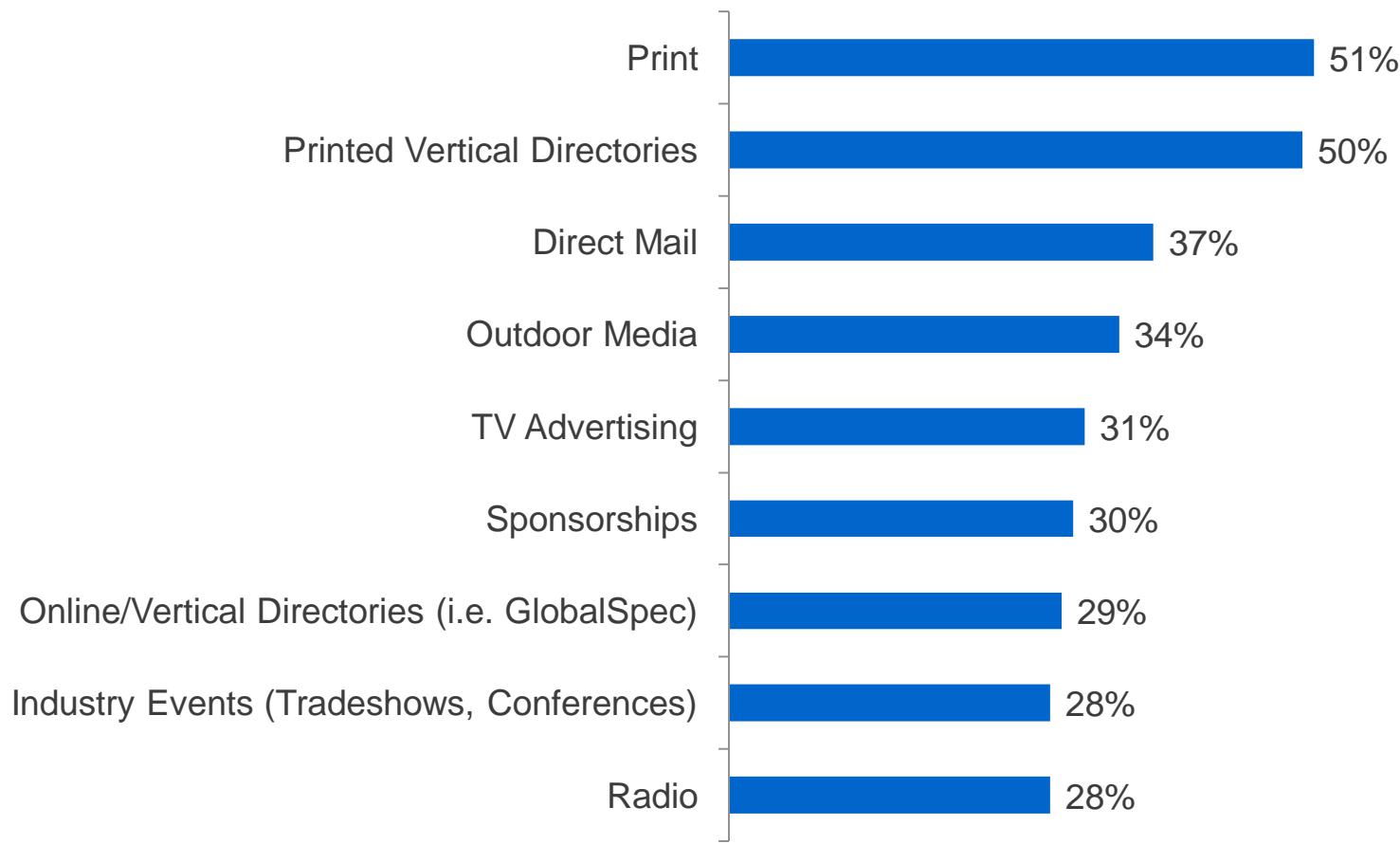
*8% increase in  
digital marketing  
share of  
marketing spend*



Floating Base, 'Use(d) Channel in 2009'

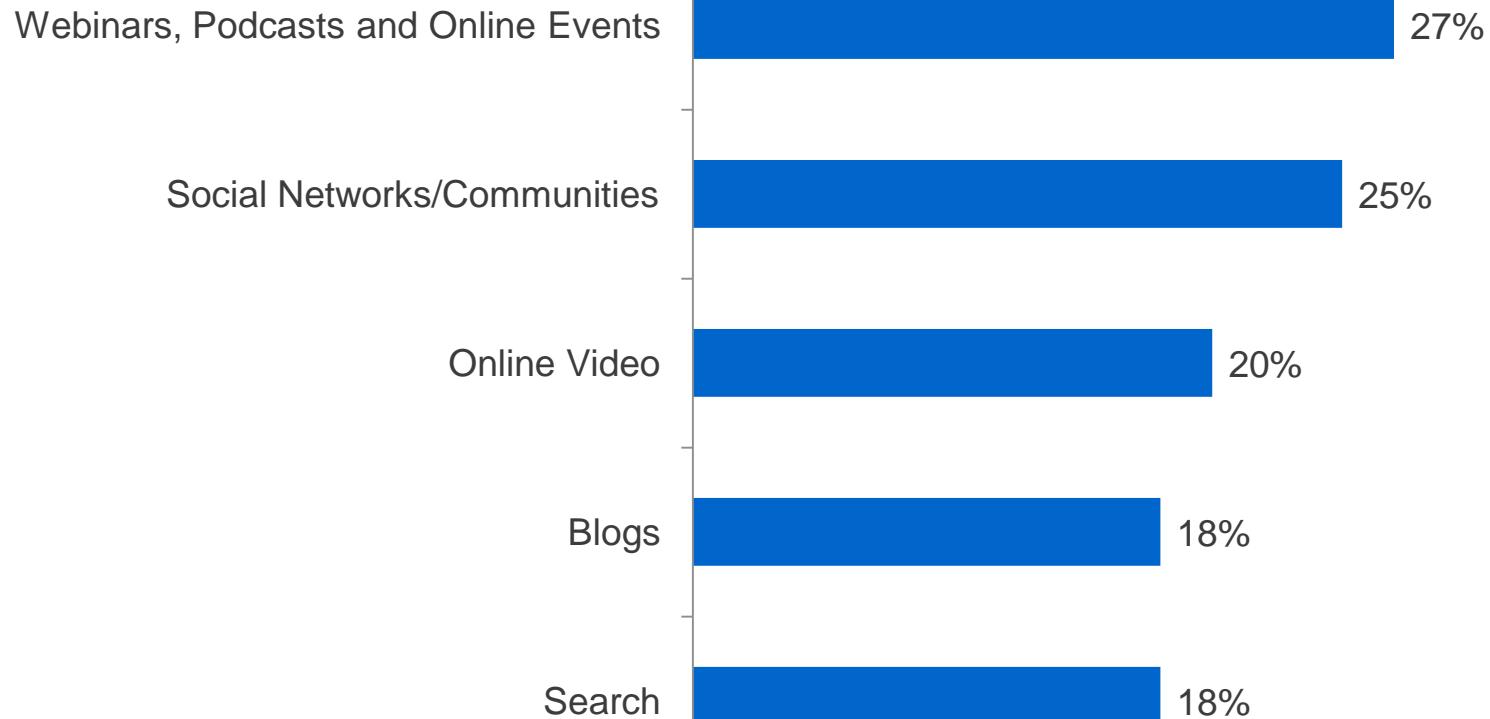
(Q18) Of all the media you indicated you've used in 2009, which do you plan on increasing budget for, which will decrease and which will be maintained in 2010?

# Where Marketers are Decreasing 2010 Spend



Floating Base, 'Use(d) Channel in 2009'  
(Q18) Of all the media you indicated you've used in 2009, which do you plan on increasing budget for, which will decrease and which will be maintained in 2010?

# New Tactics to be Adopted in 2010

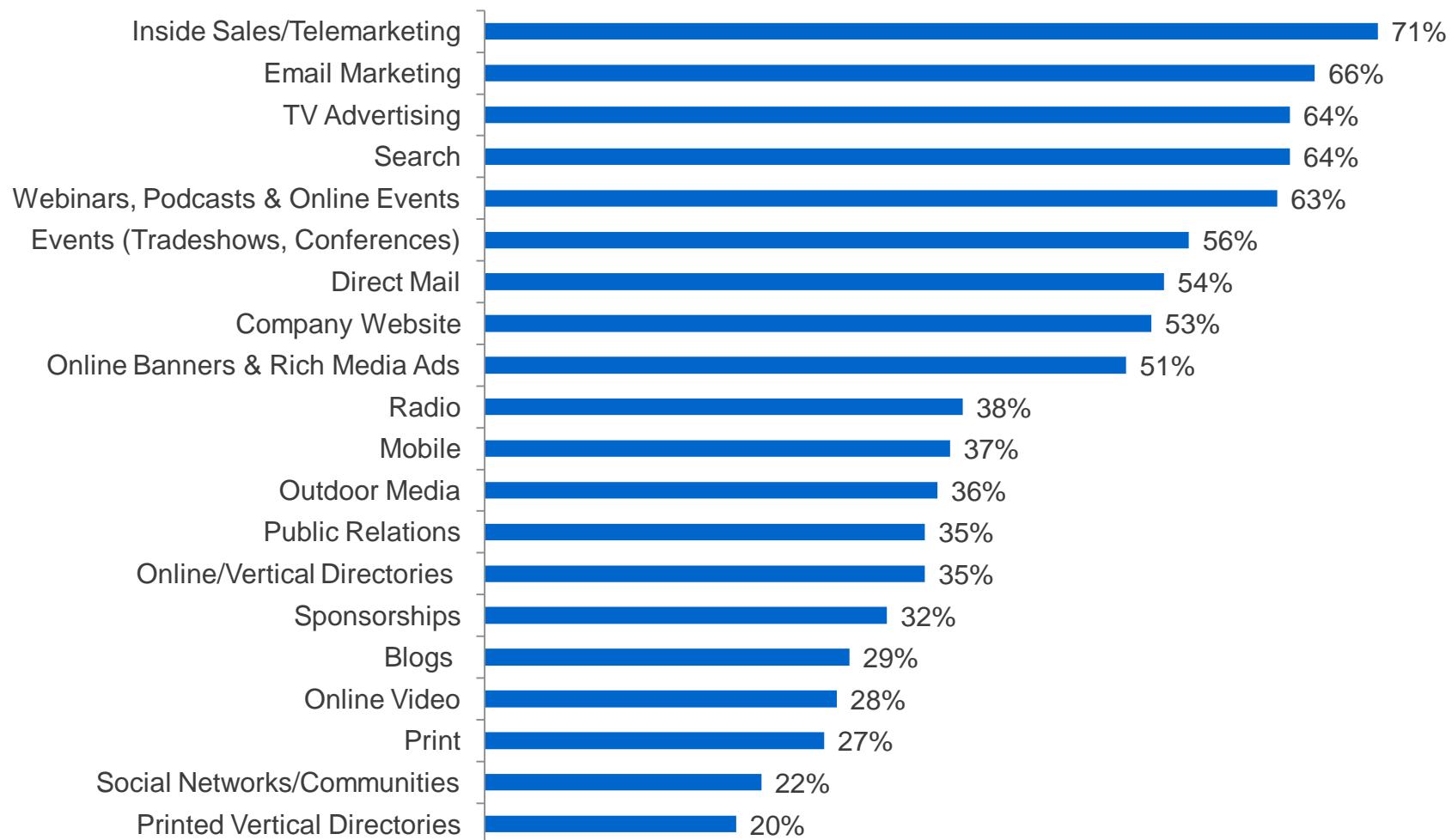


Floating Base, 'Did Not Use Marketing Initiatives in 2009'  
(Q19) And of the media you indicated you are not using in 2009, which, if any, do you plan to use in 2010?

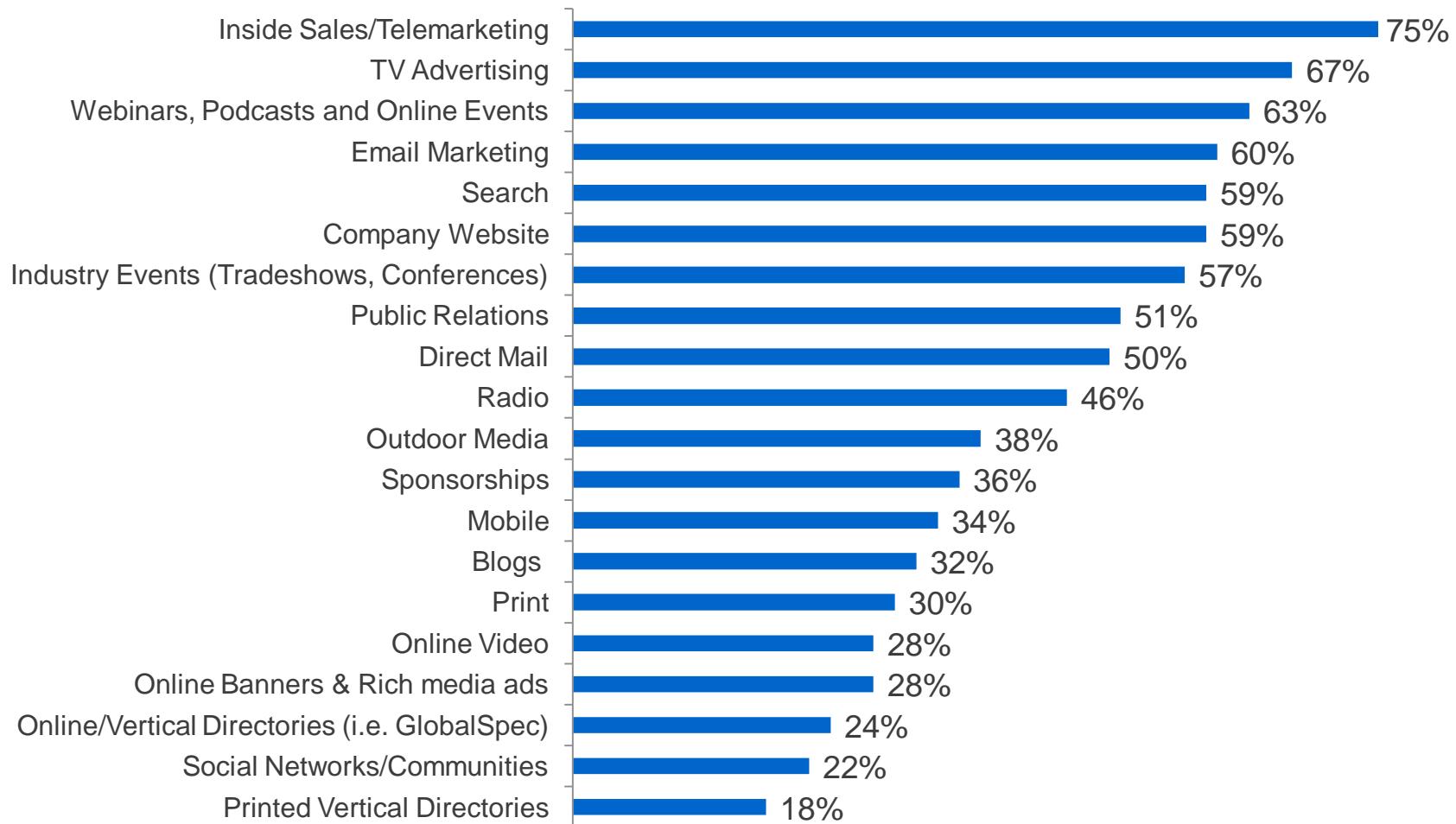


# Measuring Return on Investment

# Ability to Measure ROI by Marketing Tactic



# Satisfaction with Return on Investment by Tactic



# Key insights from B2B marketers' 2010 outlook

- **The economic downturn** significantly affected 2009 marketing programs, but marketers are preparing for a recovery in mid-to-late 2010
- **Digital metrics** are considered a primary success factor for online programs, but there is opportunity to improve tracking revenue and cost per leads generated
- **Digital marketing** will increase 8% as share of overall budgets in 2010, with web sites, search and webinars leading spend increases
- **Measurement** will be an increased area of focus in 2010, with marketers most confident in their ability to measure inside sales, events and search

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