



# Australian Senior Marketer Monitor 2018.



To start, a bit about  
the research results...

Colmar Brunton,  
in partnership with the  
Australian Marketing Institute,  
celebrate 10 years of the  
Australian Senior Marketer Monitor.

Each year, since 2009, we've dived into the world of  
Australia's senior marketing professionals.

In this report, we take a look at how the marketing  
environment has changed over the last 12 months  
and how this compares to the last 10 years.

Key focus areas include:

- Sentiments
- Priorities
- Anticipated budgets
- Communication channels
- Business challenges
- Preparedness in relation to these specific challenges.



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## About the research.



### Target audience

- Senior marketers from government, not for profit and commercial organisations
- Across all states and territories



### Sample size

- Total n=174
  - Government / NFP: n=64
  - Commercial: n=110



### Methodology

- Online survey

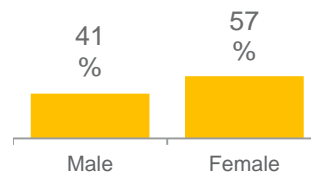


### Fieldwork period

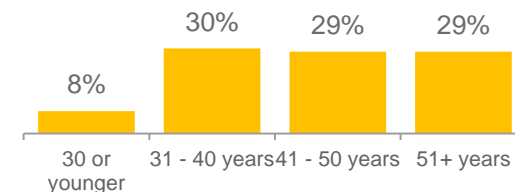
- November 2017 to January 2018

## Sample profile.

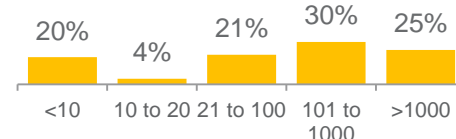
### Gender



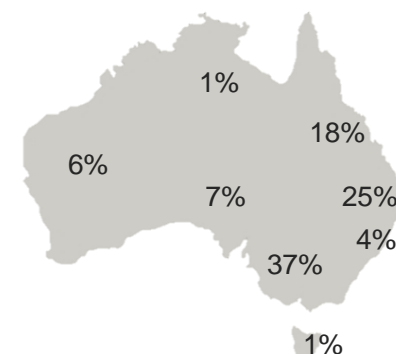
### Age



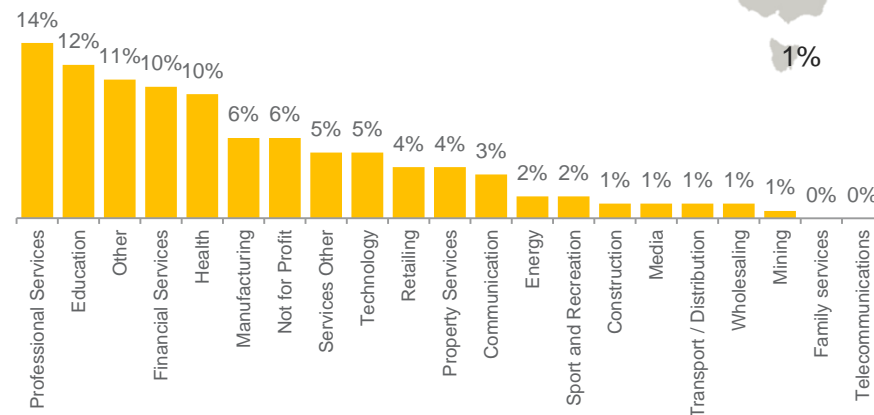
### Size



### Location



### Industry



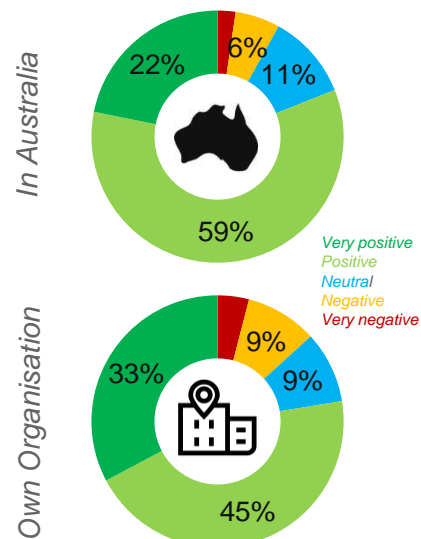


In a nutshell.

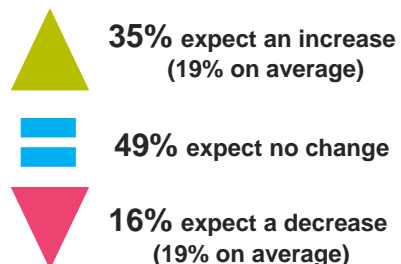
# 2018 Australian Senior Marketer Monitor.

Since 2009 Colmar Brunton, in partnership with the Australian Marketing Institute (AMI) has conducted an annual study of Australia's senior marketing professionals – providing insight into their sentiment and priorities, as well as the challenges faced and channels used. Key results for the most recent study are outlined below.

## Marketing's role & influence



## Budget expectations next 12 months



## Top 5 increased priorities in past 12 months

### Commercial

- Increase sales
- Customer acquisition
- Customer experience
- Current period profits
- Spend efficiency

### Government / Not for Profit

- Customer experience
- Social marketing
- Brand
- Spend efficiency
- Public engagement

## Top 5 challenges currently faced

### Commercial

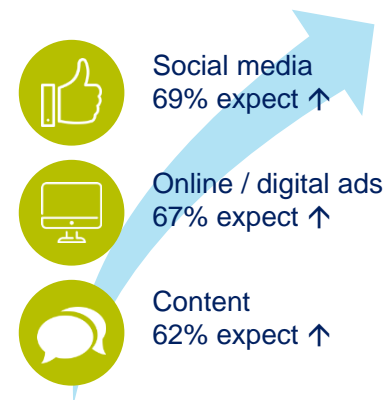
- Customer acquisition
- Creating differentiation
- Getting message to market
- Customer retention
- Measuring ROI

### Government / Not for Profit

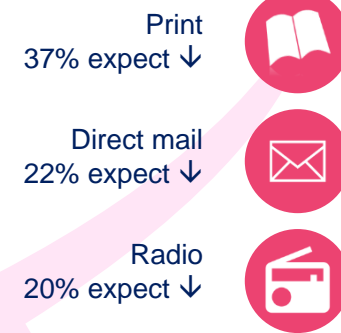
- Communicating message
- Engaging key audiences
- Measuring ROI
- Customer acquisition
- Stakeholder management

## Changes in channel usage past 12 months

### Top 3 increases



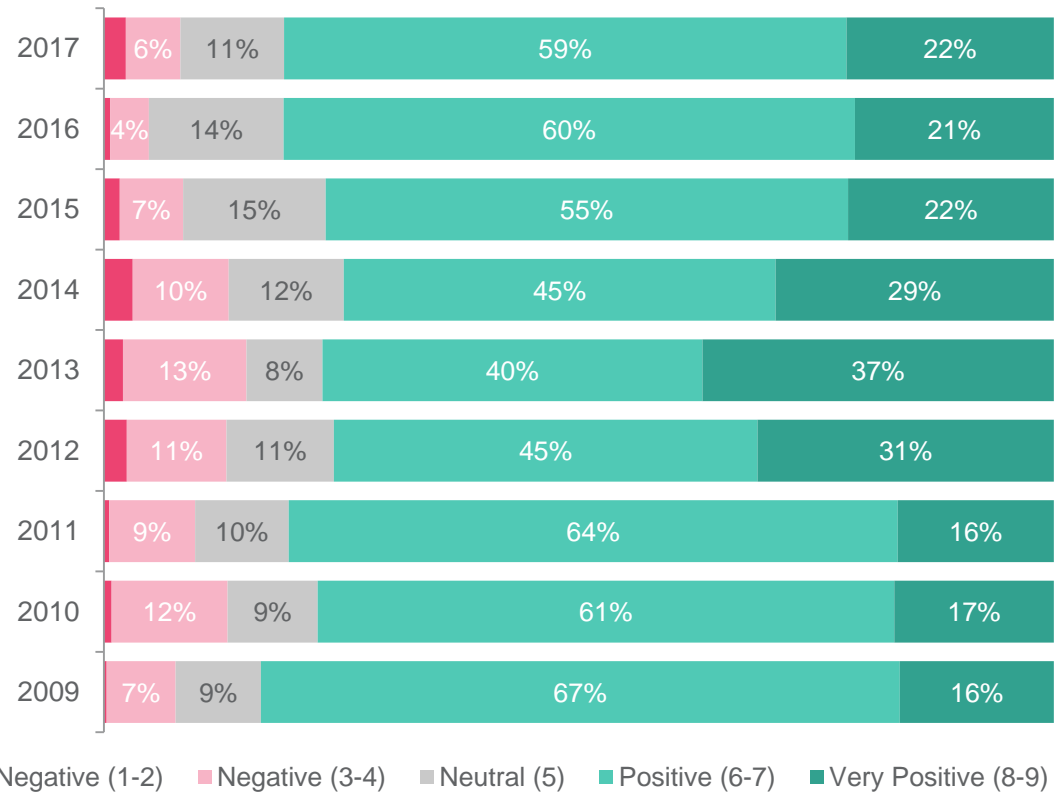
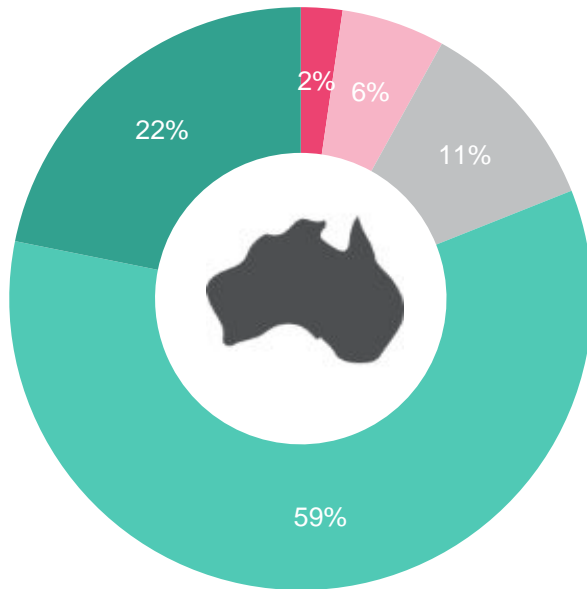
### Top 3 decreases





And now let's look at  
the latest results in  
detail...

# Role and influence of marketing in Australia.

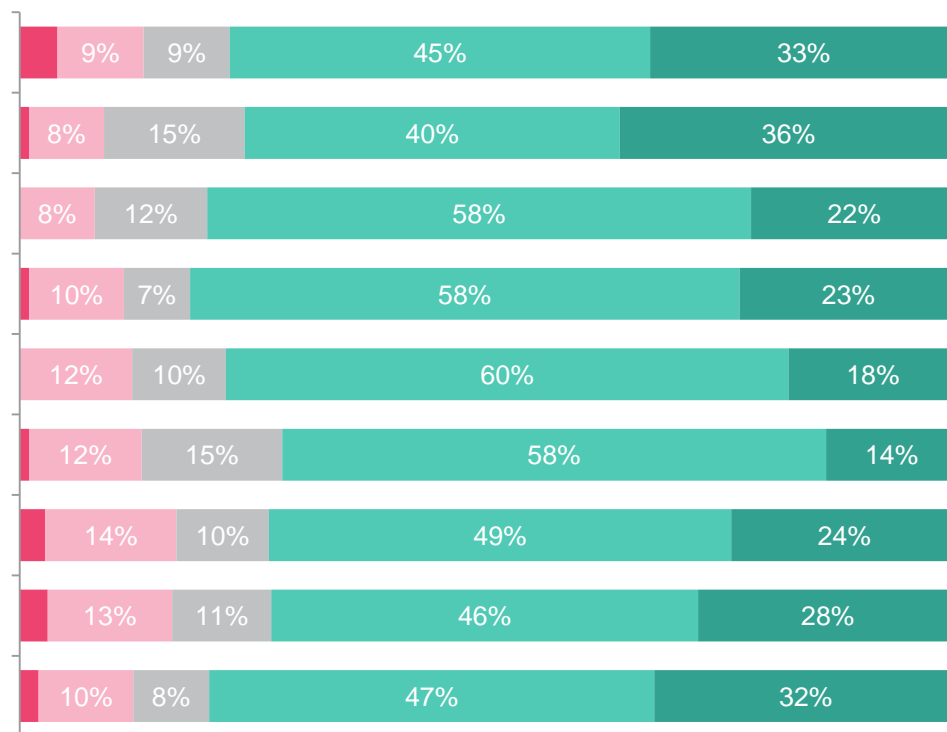
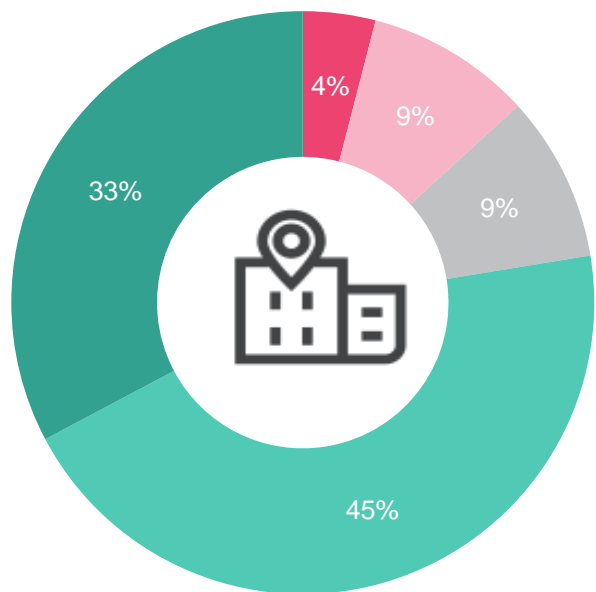


Q. How do you feel about the role and influence of marketing in Australian organisations today? (9pt scale – very negative to very positive)

Base sizes 2017 Total n=174.



# Role and influence of marketing in own organisation.

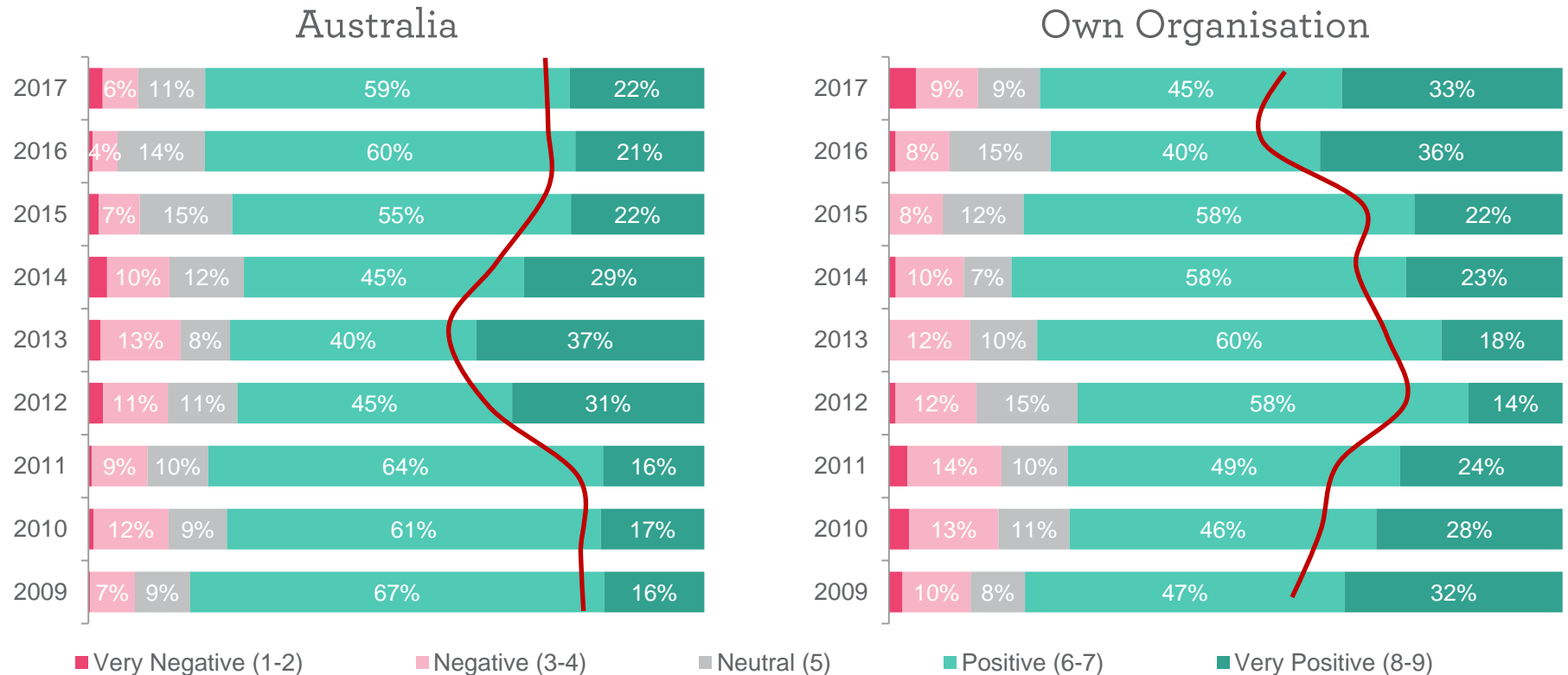


■ Very Negative (1-2) ■ Negative (3-4) ■ Neutral (5) ■ Positive (6-7) ■ Very Positive (8-9)

Q. How do you feel about the role and influence of your marketing department/team in your organisation today? (9pt scale – very negative to very positive)

Base sizes 2017 Total n=174

# Role and influence of marketing in Australia vs. own organisation.

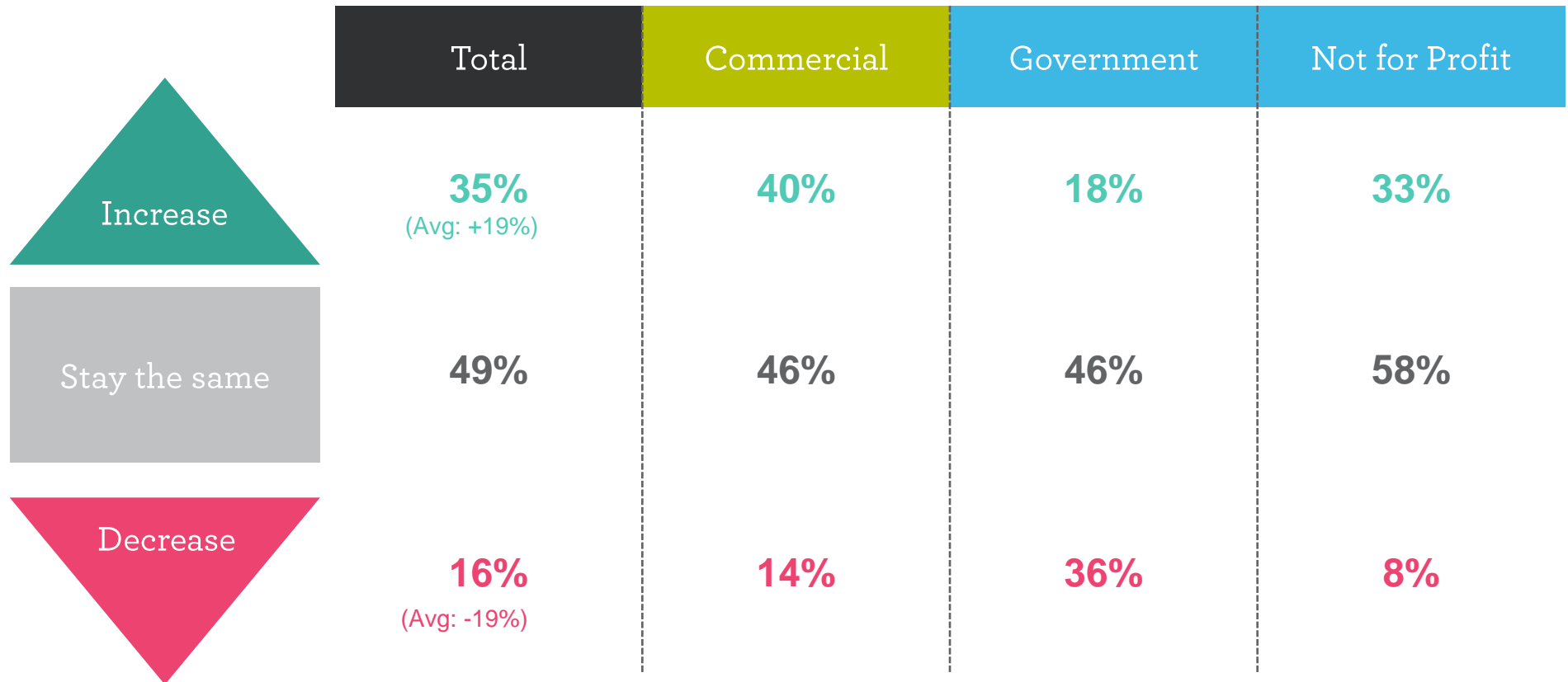


Q. How do you feel about the role and influence of marketing in Australian organisations today? (9pt scale – very negative to very positive)

Q. How do you feel about the role and influence of your marketing department/team in your organisation today? (9pt scale – very negative to very positive)

Base size 2017: Total n=174

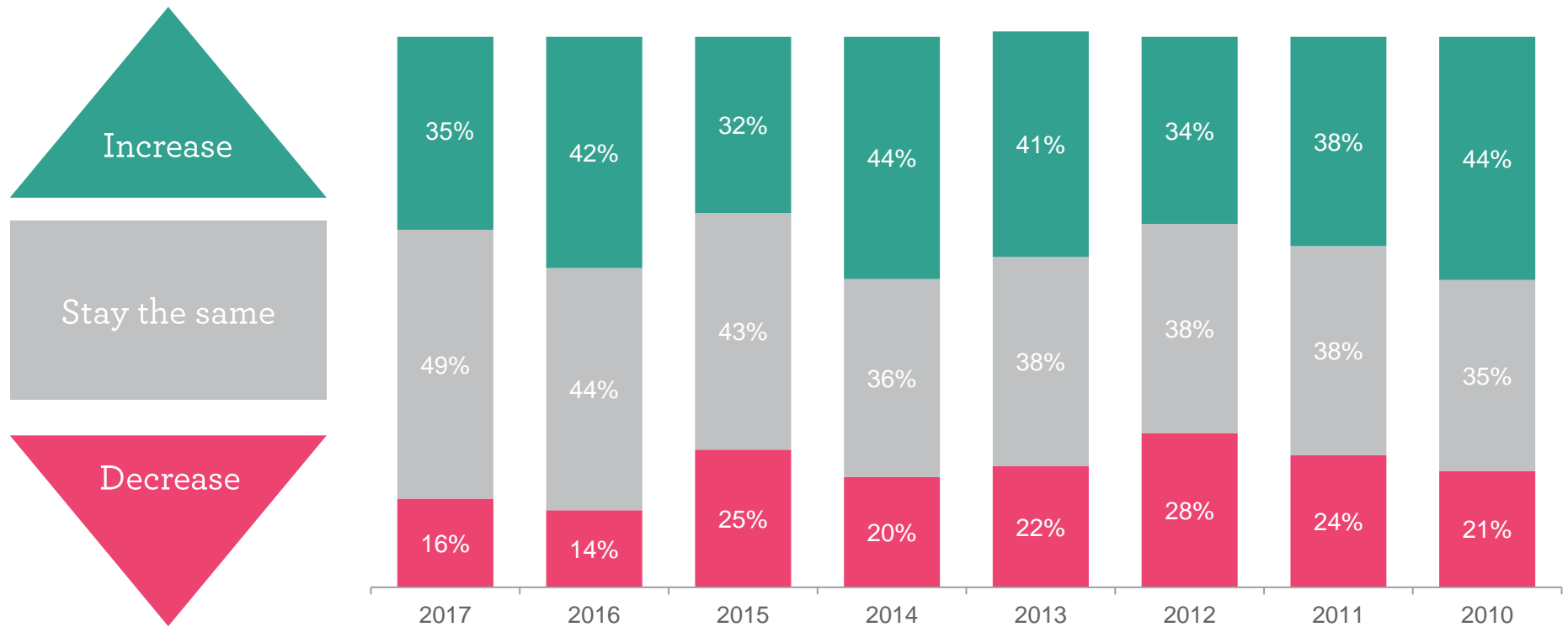
## Budget expectations for next 12 months.



Q.. In 2018, how do you expect your marketing budget to change from 2017? Do you expect it to: Increase, stay the same, decrease

Base sizes 2017: Total n=174, Commercial n=110, Government / Not for Profit n=64

## Budget expectations over time.



Q.. In 2018, how do you expect your marketing budget to change from 2017? Do you expect it to: Increase, stay the same, decrease

Base size 2017: Total n=174



# What is driving expected changes in budget?

## Challenges with leadership

“

*I work in childcare. The sector is run by under-educated leaders who don't understand what marketing is other than advertising / new lead generation.*

“

*New management with lack of understanding of how marketing can contribute to the growth function of the business. Seen as a cost centre rather than a revenue centre.*

“

*Organisational changes in higher managements/levels*

## Tightening of purse strings

“

*Push from global to reduce our costs*

“

*Less income, tightening of expenditure*

“

*Tighter fiscal management - cuts across all 'support services'*

## Shift in focus

“

*Profit squeeze and technical focus of the organisation. Marketing is seen as an optional spend.*

“

*More emphasis on relationship building*

Q. What is driving this changes in your expected marketing budget? Open ended response.  
Base size 2017: Total n=174

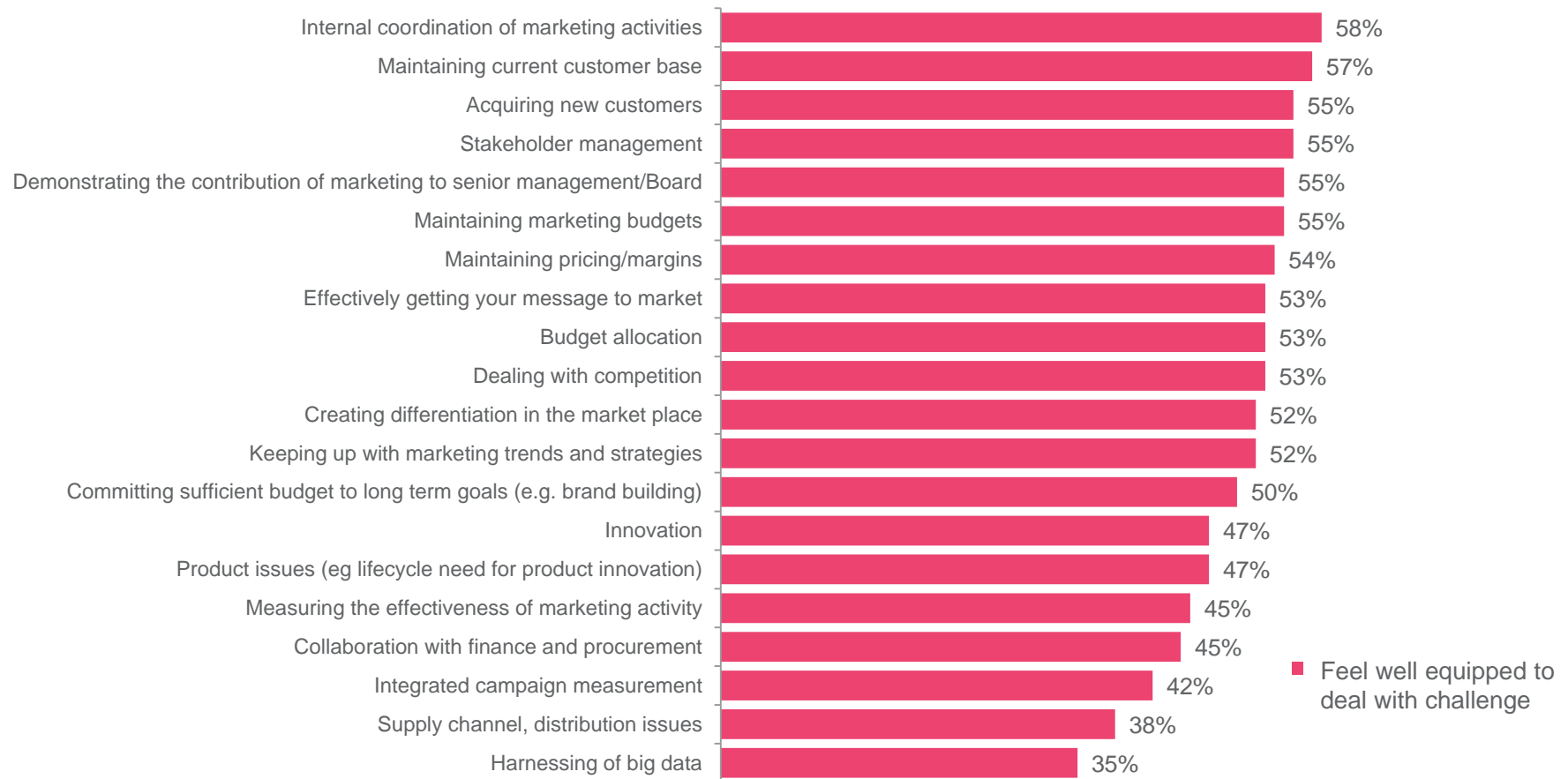
## Types of challenges being faced by marketers:



Q. We are interested in your perceptions of the major marketing challenges you are facing in your organisation today (9 pt scale – very low level priority to very high level priority).

Base size 2017: Commercial n=110

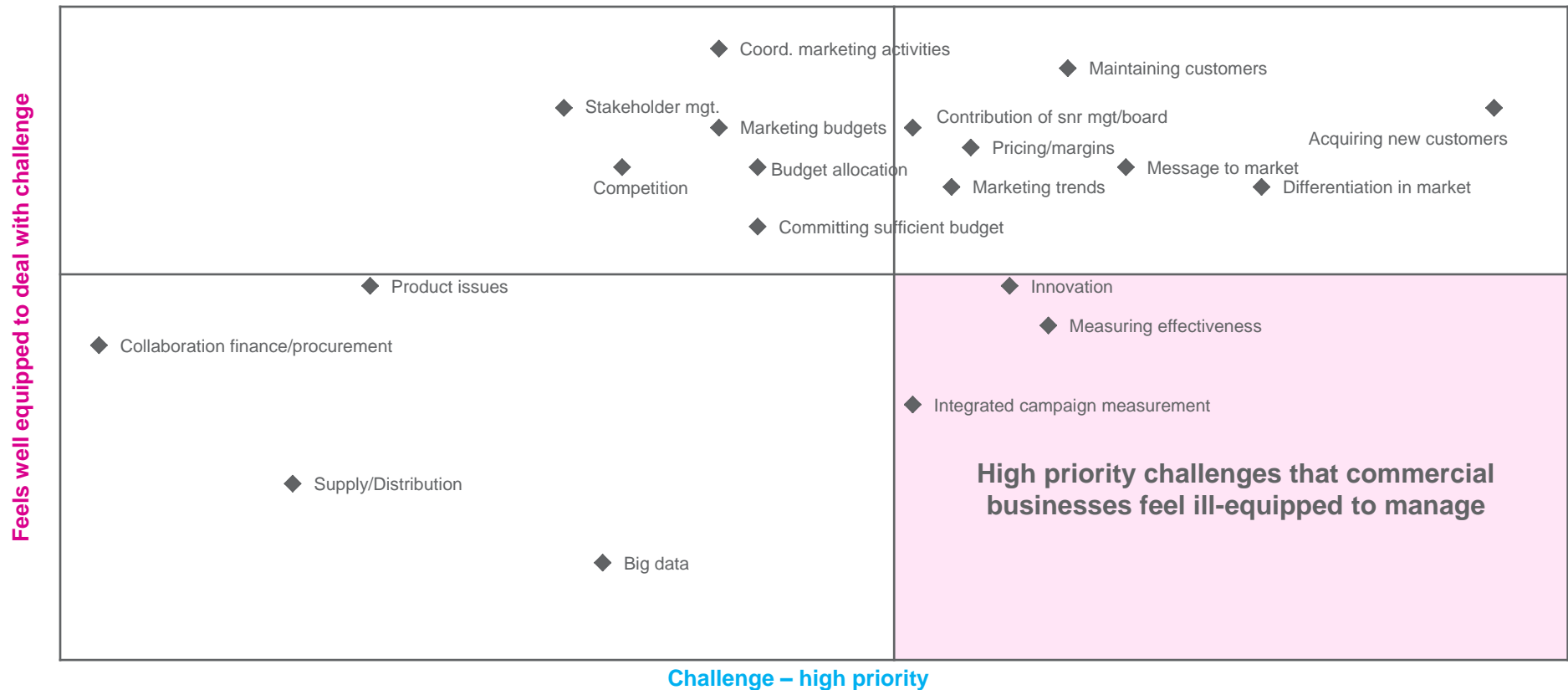
## Extent marketers feel equipped to meet challenges:



Q. And to what extent do you feel equipped to meet these challenges?

Base size 2017: Commercial n=110

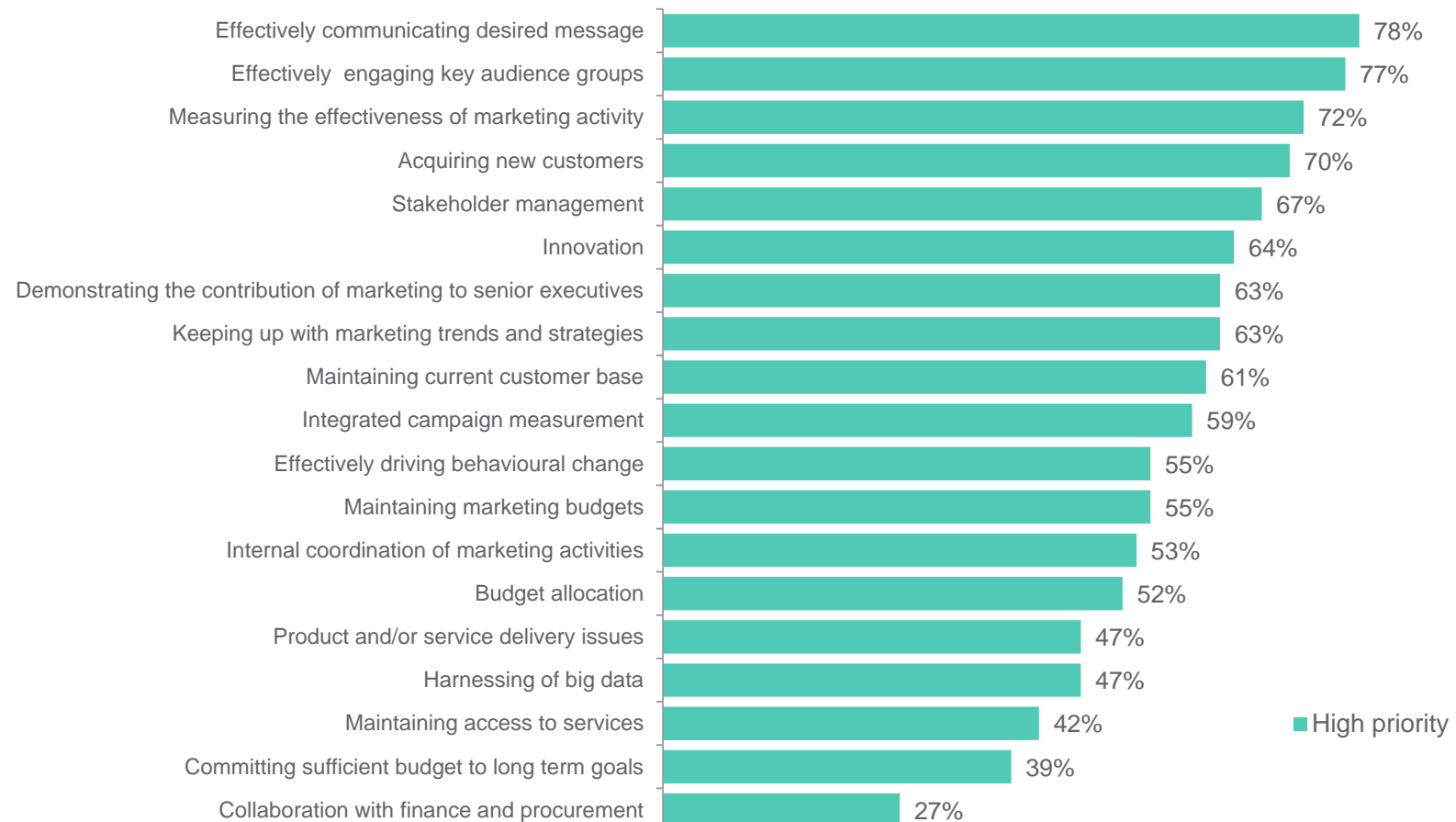
# Challenges faced vs. extent feel equipped to meet.



Q. We are interested in your perceptions of the major marketing challenges you are facing in your organisation today (9 pt scale – very low level priority to very high level priority).  
Base size 2017: Commercial n=110



## Types of challenges being faced by marketers:



Q. We are interested in your perceptions of the major marketing challenges you are facing in your organisation today (9 pt scale – very low level priority to very high level priority).

Base size 2017: Government / Not for Profit n=64

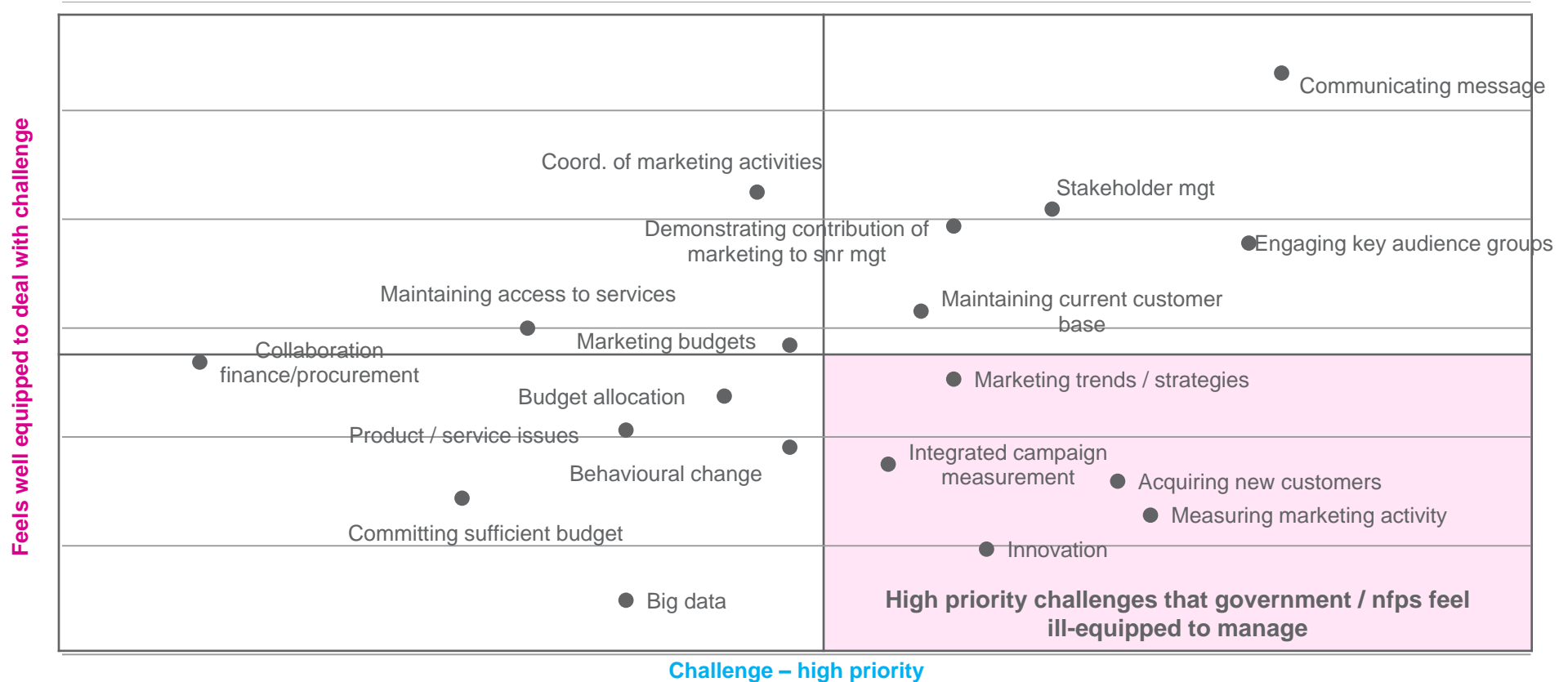
## Extent marketers feel equipped to meet challenges:



Q. And to what extent do you feel equipped to meet these challenges?

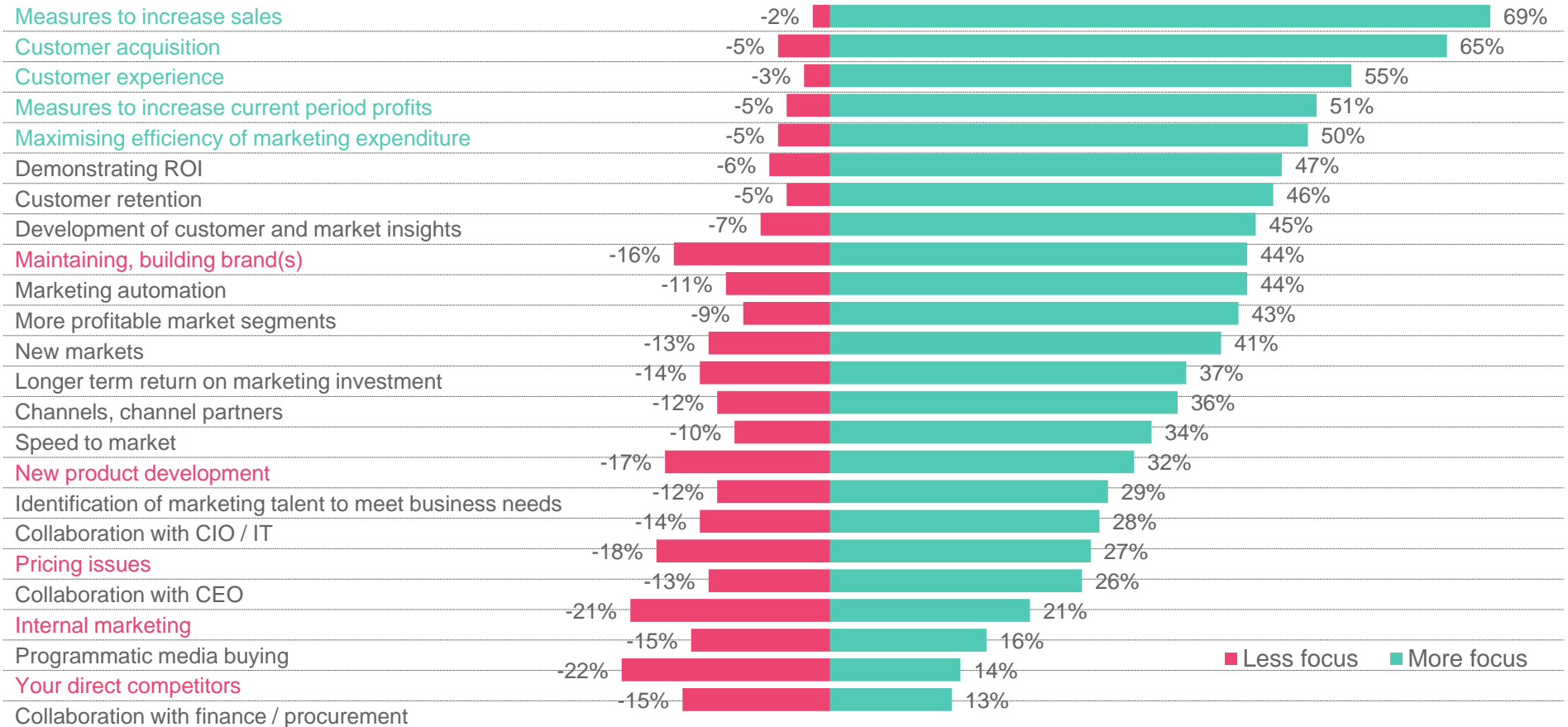
Base size 2017: Government / Not for Profit n=64

# Challenges faced vs. extent feel equipped to meet:



Q. We are interested in your perceptions of the major marketing challenges you are facing in your organisation today (9 pt scale – very low level priority to very high level priority).  
Base size 2017: Government / Not for Profit n=64

# Changes in marketing priorities over past 12 months.

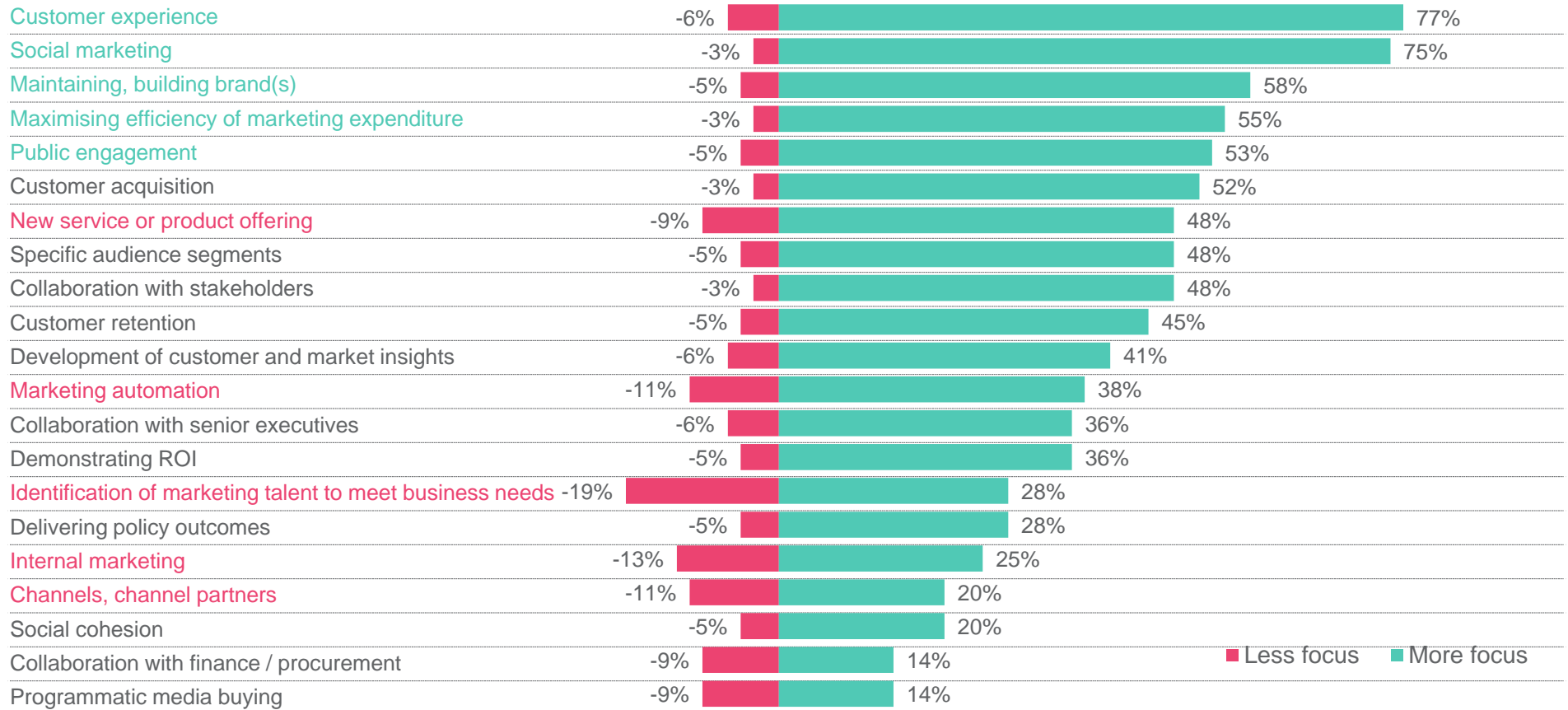


Q. Have your marketing priorities shifted in the past 12 months?

Base size: Commercial n=110



## Changes in marketing priorities over past 12 months.



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

Base size: Government / Not for Profit n=64

## Increases in priorities: Commercial vs. Government / Not for Profit.

### COMMERCIAL

#### Top 5 'More Focus'

1. Measures to increase sales
2. Customer acquisition
3. Customer experience
4. Measures to increase current period profits
5. Maximising efficiency of marketing expenditure

### GOVERNMENT / NOT FOR PROFIT

#### Top 5 'More Focus'

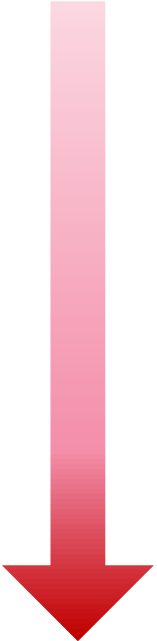
1. Customer experience
2. Social marketing
3. Maintaining, building brand(s)
4. Maximising efficiency of marketing expenditure
5. Public engagement

Q. Have your marketing priorities shifted in the past 12 months?  
Base size: Commercial n=110, Government / Not for Profit n=64

## Decreases in priorities: Commercial vs. Government / Not for Profit.


### COMMERCIAL

#### Top 5 'Less Focus'

- 
1. Your direct competitors
  2. Internal marketing
  3. Pricing issues
  4. New product development
  5. Maintaining, building brand(s)

### GOVERNMENT / NOT FOR PROFIT

#### Top 5 'Less Focus'

- 
1. Identification of marketing talent to meet business needs
  2. Internal marketing
  3. Marketing automation
  4. Channels, channel partners
  5. New service or product offering

Q. Have your marketing priorities shifted in the past 12 months?  
Base size: Commercial n=110, Government / Not for Profit n=64

# What is driving recent changes in marketing priorities and focus?

## Digital era

“

*Moving from paper based collateral to digital collateral. Moving from broadcast media to digital media channels where specific audiences can be found. Better bang for the buck.*

“

*Digital transformation projects focusing largely on improving customer experience and online sales*

“

*Technology, Consumerism (buyers getting smarter with easier access to information)*

## Focus on brand

“

*Corporate strategy - meeting brand and growth targets while developing a differentiated and superior customer experience*

“

*Rebrand and new offerings introduced mid-2017*

## Market changes

“

*Changing market conditions and identification of need to continue to modernise marketing practices in line with best standards*

“

*More emphasis on relationship building*

“

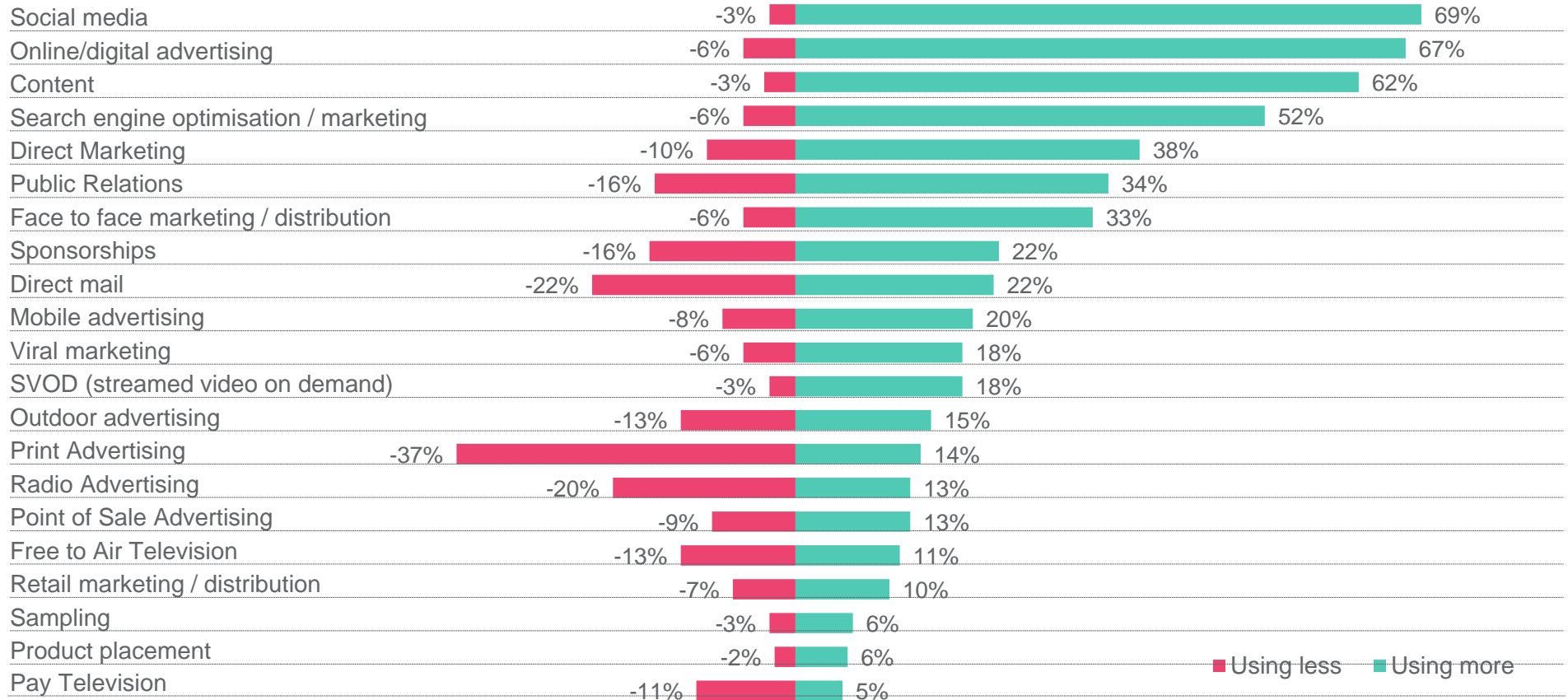
*External environment conditions increasing competition*

Q. What is driving these changes in your marketing priorities and focus? Please type your response below

Base size 2017: Total n=174



# Recent changes in communication channels.



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

Base size: Commercial n=110

# What is driving recent changes in channel usage?

## Customers driving change

“

*The target audiences testing new channel effectiveness*

“

*Customer base and how they consume content*

“

*B2B and B2C customers are changing how and where they find information so we are endeavouring to place our communication where they are looking*

## Less 'traditional' approach

“

*Law firms are embracing online marketing/promoting/selling a lot more now*

“

*Marketing strategies are emerging and changing to less traditional models, especially for SMEs*

“

*Changing attitudes among senior executive/management towards evolving technologies and non-traditional platforms*

## Digital, digital, digital

“

*The increased importance of online and social media is driving a lot of our current marketing strategies*

“

*Customer engagement through changes in content especially video content, ability to measure ROI from digital channels better than traditional print or outdoor*

“

*The access of digital and the increased traffic online is a key driver here. This is a space we need to be strong to acquire NEW customers (our loyal customers will primarily use older methods)*

Q. What is driving these changes in your use of different communication channels? (open-ended response)

Base size 2017: Total n=174



# Thanks.



For further information please contact:

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