



### Introduction and Methodology

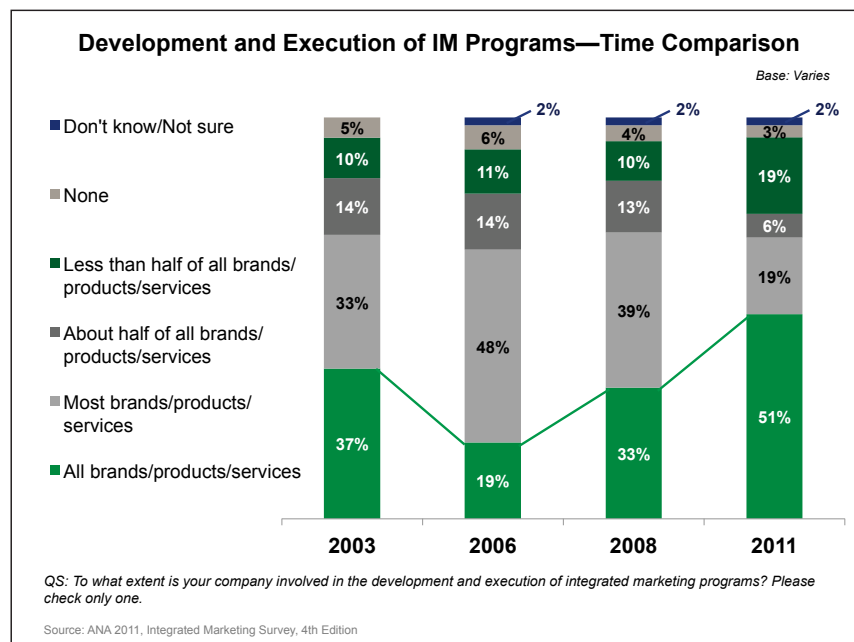
This report covers the findings from an online survey conducted by the ANA during September and October of 2011. This is the fourth survey in eight years conducted by the ANA; past surveys were conducted in 2003, 2006 and 2008. The objective of the survey was to analyze the challenges marketers face when implementing effective IM programs and identify key concerns that have changed from 2003 to now. It also explores the contributions from within the organization and from agency partners on their IM programs.

In total, 107 client-side marketers are represented in the survey. The majority of the participants included members of the ANA panel who are periodically surveyed on a range of timely, industry-related topics. Respondents to this survey have 16 years of experience in marketing, on average.

### Key Findings

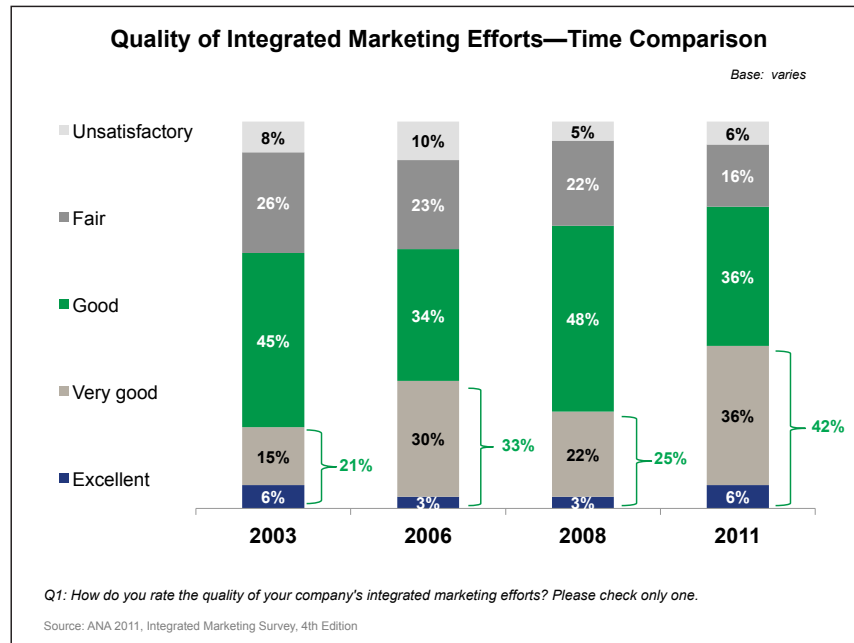
#### More Companies Developing and Executing IM Programs for All Brands/Products/Services

The percentage of marketers who say they are developing/executing integrated marketing programs for all or most of their brands/products/services has remained steady throughout the years. However, **more marketers are developing/executing IM programs for all of their brands/products services than in the past.** Also, more marketers today report their company has job titles specific to integrated marketing compared to three years ago (29% and 24%, respectively).



## Quality of Integrated Marketing Efforts at an All-Time High

The quality of IM programs is at an all-time high compared to past ANA survey data. When marketers were asked to rate the quality of their company's integrated marketing efforts, 42% rated it as excellent or very good. In 2008, a quarter surveyed (25%) rated their company's IM efforts as excellent or very good. Eight years ago, in 2003, only 21% said the same. The perceived increase in IM efforts may be attributed to the increased use of newer media platforms that allow enhanced targeting and richer metrics.



## Mobile Marketing and Social Media/Networking's Value to MC Programs Increase

Respondents rated search engine marketing and public relations as the most valuable marketing communications programs. This has remained steady since 2006. Meanwhile, **mobile marketing and social media/networking's value to marketing communications has increased considerably.**

**Value of Specific Marketing Communications Programs—Time Comparison**

*Base: Varies*

(Top-2-Box Summary: % Very Important, Important)

|                             | 2006 | 2008 | 2011 |
|-----------------------------|------|------|------|
| Search engine marketing     | 72%  | 74%  | 87%  |
| Public relations            | 89   | 87   | 87   |
| Internet advertising        | 77   | 77   | 85   |
| General advertising         | 88   | 83   | 81   |
| Sales promotion             | 74   | 73   | 80   |
| Word of mouth/viral         | n/a  | 74   | 76   |
| Event marketing             | 61   | 60   | 70   |
| Social media/networking     | n/a  | 40   | 68   |
| Direct response advertising | 58   | 55   | 62   |
| Mobile marketing            | 19   | 25   | 56   |
| Multicultural marketing     | n/a  | n/a  | 54   |
| Sponsorship                 | 53   | 50   | 51   |
| In-store/point-of-sale      | 59   | 61   | 50   |
| Branded entertainment       | 25   | 26   | 27   |
| Videogame advertising       | 7    | 4    | 6    |

*Q2: How do you characterize the value to your business of each of the following marketing communications programs?*

Source: ANA 2011, Integrated Marketing Survey, 4th Edition

When marketers were asked to select a single marketing communications program that provides the greatest value, 32% of the total sample selected general advertising. However, **more marketers who work for companies with larger ad budgets (< \$100M) see the most value in general advertising than marketers who work for companies with smaller ad budgets (78% and 21%, respectively).** Marketers who work for companies with smaller ad budgets placed greater importance on alternative platforms (e.g., mouth/viral, in-store/point-of-sale, SEM, internet advertising, etc.)

**Marketing Communications Programs That Provide Greatest Value**

*Base: 94*

|                             | Total Sample | Company Type |        |             | Annual Revenue |         | Annual Ad Budget |          |
|-----------------------------|--------------|--------------|--------|-------------|----------------|---------|------------------|----------|
|                             |              | B-to-B       | B-to-C | Equal Combo | < \$10B        | > \$10B | < \$100M         | > \$100M |
| Base                        | 94           | 24           | 25     | 15          | 30             | 25      | 34               | 9        |
| General advertising         | 32%          | 8%           | 44%    | 13%         | 23%            | 24%     | 21%              | 78%      |
| Direct response advertising | 14           | 13           | 20     | 13          | 23             | 8       | 21               | 0        |
| Sales promotion             | 14           | 25           | 8      | 27          | 7              | 32      | 15               | 11       |
| Word of mouth/viral         | 10           | 8            | 8      | 13          | 13             | 4       | 6                | 0        |
| Public relations            | 9            | 17           | 8      | 0           | 10             | 8       | 12               | 0        |
| Event marketing             | 5            | 8            | 4      | 7           | 7              | 4       | 9                | 0        |
| In-store/point-of-sale      | 5            | 4            | 0      | 20          | 3              | 8       | 6                | 0        |
| Search engine marketing     | 4            | 8            | 4      | 0           | 10             | 0       | 6                | 0        |
| Social media/networking     | 3            | 0            | 0      | 7           | 0              | 4       | 0                | 11       |
| Sponsorship                 | 2            | 4            | 4      | 0           | 0              | 8       | 3                | 0        |
| Internet advertising        | 2            | 4            | 0      | 0           | 3              | 0       | 3                | 0        |
| Branded entertainment       | 0            | –            | –      | –           | –              | –       | –                | –        |
| Mobile marketing            | 0            | –            | –      | –           | –              | –       | –                | –        |
| Multicultural marketing     | 0            | –            | –      | –           | –              | –       | –                | –        |
| Videogame advertising       | 0            | –            | –      | –           | –              | –       | –                | –        |

Note: the subgroup average may not equal the total sample average because not all respondents shared their firmographic information.

Q3: Which of the following marketing communications programs provides the greatest value to your business? Please check only one.

Source: ANA 2011, Integrated Marketing Survey, 4th Edition

### Top Metrics for Measuring IM Success

**Sales growth/volume is the top measure of IM success.** Nearly three out of four marketers surveyed said they measure their IM success by sales growth/volume (74%). Sixty-one percent surveyed use a brand tracking study. Brand tracking studies measure the health of a brand and typically include metrics such as awareness, usage, attitude, perception and purchase intent. Response data (e.g., cost per lead, cost per sale, cost per click, etc.) is also a top measurement. Over the past eight years, the percentage of marketers using these metrics for measuring the effectiveness of IM programs remains steady.

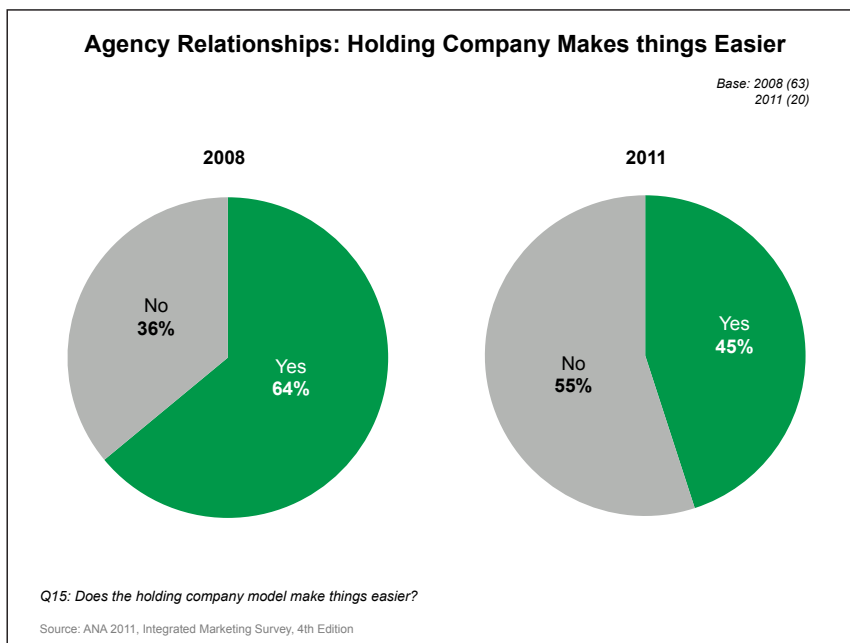
### More Agency Performance Reviews Include Measurements Related to Successful IMC

More marketers indicate that their agency performance reviews include performance measurements related to the successful integration of different marketing communications functions in 2011 compared to 2008 (46% and 40%, respectively). With more media options, many companies have been using more agencies. **The increased use of IM performance measurements for agencies may be due to the increased need for multiple agencies to work together.**



## More Companies Prefer to Use Individual Agencies, Regardless of Holding Company Affiliation/Ownership

Fewer marketers today believe the holding company model makes things easier. Some marketers believe that holding companies do not make things easier because they are slow, lack flexibility and often suffer from internal competition.



## Agencies Must Focus on Strategic Objectives, Have One Contact Point for Clients

More than half of marketers surveyed said that agencies can maximize integrated marketing communication (IMC) effectiveness by ensuring strategic objectives are focused on IMC activities (52%). More than two out of five surveyed believe agencies can maximize IMC effectiveness by working more cooperatively with other MarComm agencies in the planning/execution of programs and to eliminate silos between various agency departments.

Also, when looking at past survey results, a growing number of marketers are seeking a single point of contact for all MC needs—less than a quarter surveyed in 2008 said that having one agency contact is needed to maximize effectiveness of their IMC programs (23%), that number grew to 35% in the 2011 survey. **The increased use of multiple agencies (traditional, digital, etc.) may have also facilitated the growing need to have a single point of contact per agency.**

|                                                            | 2003 | 2006 | 2008 | 2011 |
|------------------------------------------------------------|------|------|------|------|
| Have one agency contact point for all client MarComm needs | 28%  | 21%  | 23%  | 35%  |

*Q17: How must your agency or agencies change (if at all) in order to maximize effectiveness of your integrated marketing communications programs?*

Source: ANA 2011, Integrated Marketing Survey, 4th Edition

## Conclusion

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More companies are developing and executing integrated marketing programs for all of their brands/products/services than in the past. Marketers also believe the quality of IM programs has increased as well. The perceived increase in IM efforts may be attributed to the increased use of newer media platforms which allow enhanced targeting and richer metrics. As such, mobile marketing and social media/networking's value to marketing communications has increased considerably, among those surveyed.

However, large obstacles exist in developing and implementing effective IM programs. In the past three surveys, the existence of functional silos within the company was ranked the top challenge to planning and executing IM programs. It was the second most popular ranked challenge behind "insufficient budget" in the 2011 survey. Marketers shared ways to eliminate silos, these consist of:

- Changes in org structure to align multiple disciplines under one leader
- Cross-training on what related functional groups do in their support of the overall goal
- Regularly scheduled cross-team update meetings ("all-hands" meetings)
- Creating shared annual performance goals
- Top-down leadership support for driving integration across channels

Overall, many marketers want true partnership from their agency(ies) when it comes to developing/implementing an effective IM program. Marketers want their agencies to have an in-depth knowledge of their customer as well as the overall business and to be able to develop the "big" creative idea that can be leveraged across all the different media disciplines. They also need to be able to work seamlessly with other agencies as more companies are utilizing multiple agencies for their marketing needs.

Companies can improve their integrated marketing initiative in a variety of ways. One way is to have a brand steward, or someone who oversees all marketing efforts across the board. As detailed in this report, more companies have dedicated IM positions than in the past. Another consideration is to employ IM metrics. Sales growth/volume, brand tracking studies (e.g., tracking awareness, usage, attitude, perception, purchase intent, etc.) and response data (e.g., cost per lead, cost per sale, cost per click, etc.) are top IM measurements used by client-side marketers. Employing shared sites and tracking software to integrate results from across the spectrum are also helpful in improving IM efforts.

## Additional Resources

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Marketers are encouraged to tap into the various resources of ANA to learn more:

**ANA Marketing Knowledge Center:** To find articles and presentations on a range of marketing topics, including agency compensation, visit [www.ana.net/mkc](http://www.ana.net/mkc), or to submit a customized information request to the Insights Team, visit [www.ana.net/asktheexpert](http://www.ana.net/asktheexpert).

**ANA Survey Research:** ANA surveys are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today. To access survey reports, which allow you to tap into members-only research and perspective, please visit [www.anasurveys.net](http://www.anasurveys.net).

**ANA Insight Briefs:** ANA Insight Briefs are compilations of the ANA's best resources on a given subject. Filled with charts, quotes, and client-side marketer case studies, they provide today's busy marketer with top-line information on the hottest topics in marketing. For more information, please visit [www.ana.net/insightbriefs](http://www.ana.net/insightbriefs).

**ANA Committees:** ANA committees offer members a forum for sharing best practices, the opportunity for peer-to-peer networking and benchmarking, and the ability to learn about new industry developments through the exchange of ideas with guest speakers and fellow committee members. ANA committees also often take leadership roles in shaping industry issues. For more on ANA committees, please go to [www.ana.net/committees](http://www.ana.net/committees).

**ANA Conferences:** The ANA helps the marketing community stay abreast of cutting-edge trends and best practices via a comprehensive calendar of national conferences. In addition, the ANA goes on the road to offer members a program of peer-to-peer gatherings that afford opportunities to discuss special needs in a convenient, informal setting. Find more information at [www.ana.net/events](http://www.ana.net/events).

**ANA School of Marketing:** The ANA School of Marketing offers marketers on-site training sessions, full-day classes, and hour-long webinars (through their Webinar Wednesday series) that help marketers grow as brand builders. For more information, please visit [www.ana.net/schoolofmarketing](http://www.ana.net/schoolofmarketing).