GETTING DIGITAL RIGHT
DEVELOPING BEST IN CLASS MARKETING IN A DIGITAL WORLD
Getting Digital Right is the Chief Marketing Officer’s single biggest business opportunity.
Millward Brown Digital and Millward Brown Optimor partnered on a quantitative and qualitative study of marketing executives to better understand the pain points preventing their teams from achieving marketing nirvana. In some respects, the observations mirrored what we’ve been hearing for the past several years. Tracking return on investment, developing a cohesive strategy, and understanding the consumer are not new concepts, but achieving them in an ever-evolving digital world has added a new set of challenges. What used to be thought of as the adorable rambunctious toddler playing off in the corner, digital has matured and now commands a seat at the adults’ table. In fact, at Millward Brown Digital, we would argue that the single best opportunity to grow great brands is getting digital right.

The study uncovered four key themes that are plaguing marketers today:

- **Disconnected consumer touchpoints**
- **Sub-optimized media allocation**
- **Inadequate consumer insights**
- **Inability to measure ROI**

Read on to see how your brand stacks up.
Planning across consumer touchpoints is the foundation of a successful brand strategy. Or, simply put know how the consumer interacts anywhere and everywhere with your brand and develop a strategy to improve it. The study confirmed that today, most brands conduct marketing in silos with insufficient interaction between teams. Only 20% of marketers surveyed reported high levels of planning and information sharing across marketing teams. Furthermore, one of the biggest myths among executives is that digital is a single marketing silo. 38% of organizations set their digital marketing strategies in silos - in practice, even within digital, marketing activities are disconnected.

“A holistic view across channels is aspirational for us. Our consumers seamlessly move between devices and channels – we want our strategies to align accordingly.”

Marketing Executive

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
41% of organizations have yet to centralize brand strategy planning.

38% of organizations set digital marketing strategies in silos.

41% of organizations have yet to centralize brand strategy planning.

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
This means that brand strategies are being developed without visibility into all consumer interactions, rendering them at best inconsistent and at worst ineffective. Without a holistic view of consumers, the connective tissue across campaigns will be weak and ultimately limit effectiveness. Today, 59% of organizations have begun to either set marketing strategy centrally or feed individual team strategies into an overall marketing strategy, a promising statistic. But it’s not enough, as 80% of marketers agreed that having a central marketing strategy was essential for ‘best in class’ marketing. Marketers need to equip themselves with the ability to incorporate holistic planning as a core element to successful brand strategy.

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
“Deriving channel insights is a key focus. Understanding the roles of different media channels in the path to purchase and how they collectively impact our brand is top of mind.”

Marketing Executive

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
The cost of a disconnected view across touchpoints is suboptimal media allocation. Marketers readily acknowledged overspending on media in some areas and under-spending in others. To achieve ‘best in class’ marketing, marketers foresaw an increase in utilization of search, mobile and social channels, and a decrease of traditional advertising (print, TV, radio, in-store). The balance between spend on traditional and digital channels has and continues to be a pain point for marketers; **only 19% of marketers surveyed were confident their organization had the optimal mix.** Even within digital, optimizing media allocation is a struggle – marketers have recognized the need to reallocate from display to video to keep up with consumers. Although there are many contributing factors preventing marketers from reaching optimal media allocations, at the top of the list were cost, lack of data on each channel’s effectiveness, and inability to link channel activity to brand impact. With mobile and social channels picking up speed, marketers need to continue to expand their channel measurement in order continue making informed allocation decisions.

**SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY**
ACHIEVING BEST IN CLASS MEDIA ALLOCATION
To reach best in class media allocation, marketers see the biggest shifts centered around ramping up mobile advertising and applications and shifting away from traditional advertising.

1. Based on survey respondents’ desired allocation of their organization’s time and effort designated to each marketing channel to drive best-in-class marketing.

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
The study also revealed the need to demystify the metrics underpinning allocation decisions. Marketers have more metrics at their disposal than ever before and are struggling to decipher which really matter and which are just noise. They understand the need to spend in the right places—especially where consumers are interacting digitally—but do not feel confident in their ability to do so effectively. **Only 39% of marketers thought their teams effectively utilized the Big Data at their disposal.** Marketers need to leverage cross-media marketing effectiveness insights to inform investment-level optimization and strategic media planning decisions.

“We need proactive partners to guide us to valuable insights by helping us understand our multiple data sources, the underlying metrics, and what it all means. My team cannot get there on their own today.”

*Marketing Executive*

**81%** of marketers believe optimizing media allocation is critical for their organization

**19%** of marketers are confident their organization has the optimal mix between traditional and digital channels

**39%** of marketers think their teams effectively use the Big Data at their disposal

**Source:** Millward Brown Digital “Getting Digital Right” Study
“To reach optimal media allocation, we need strong leadership, an openness to changing old practices, and to understand all media touch points in the path to purchase. Knowing that television is as effective as digital is not enough. The power comes from transforming knowledge to action.”

Marketing Executive
To drive successful engagement, marketers need to stitch together profiles of consumers across media, devices, and purchase channels. Doing this is extraordinarily hard, and beyond the limits of the standard research and consumer insights toolbox - surveys, focus groups, and syndicated reports. As a result, demand for behavioral research and holistic consumer insights has been on the rise. Interviewees said they were looking to round out the tried and true attitudinal survey tools with behavioral data, especially as behavioral capabilities expand to include mobile device activity. Behavioral data in and of itself has evolved to improve accuracy, now leveraging clickstream and cookie technology. 63% of marketers noted increases in use of behavioral data over the past three years and 81% expect continued increases over the next three. While marketers expect complex behavioral-based consumer studies (such as path-to-purchase engagements) to be central to the future of the industry, many recognize they are not equipped to act upon these changes. This underscores the importance of working with research partners who can provide the skills and expertise in delivering at the forefront of data technology and understanding of the marketing industry.

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
“We are trying to use behavioral data – ideally we will be using more of that in the future. I think there still needs to be a connection to survey data or asking “why” though. The industry is moving towards a balance, a combination of passive and survey data.”

Marketing Executive

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
As marketing introduces more and more science to its craft, one of the biggest problems has been how to accurately measure ROI. The discomfort with this challenge became all too comfortable as marketers have accepted some of the limitations of traditional marketing ROI tracking. Now that the world is shifting to digital, the discomfort is back. The influx of digital and its inherent measurability and accountability has forced ROI measurement to incorporate new and unfamiliar metrics. Traditional advertising, mobile, and social channels were noted as having the poorest ROI tracking. Furthermore, 81% of marketers would increase their spend on digital, mobile, and social channels if they had an increased ability to track ROI. The existing metrics are simply insufficient for a transformational marketing landscape - as an industry, we need to do a better job of helping brands navigate the transition.

“The most important priority is ROI ... simply put. Everything else in terms of pain is minor until that is resolved.”

Marketing Executive
Tracking Return on Investment

Tracking ROI for mobile and social channels remains a challenge; Marketers acknowledge its importance, but are limited by their ability to measure.

Of marketers would increase spend on digital, mobile and social channels if they could better track ROI.

SOURCE: MILLWARD BROWN DIGITAL “GETTING DIGITAL RIGHT” STUDY
PUNCHING ABOVE YOUR (DIGITAL) WEIGHT

Marketers have struggled with how to best incorporate their digital strategy into their overall brand strategy, as only 43% of organizations are integrating the two. At the 2013 Dmexco, Procter & Gamble’s Global Brand Building Officer, Marc Pritchard, declared “the era of digital marketing is over... It’s now just brand building.” This idea has been reverberating across marketing thought leaders and now needs to find its place in every brand strategy.

Marketers need to take a step back and equip themselves with a full brand perspective. Understanding the intricacies of each medium is important, but useless if marketers don’t take a brand-centric approach. Linking digital strategy to a broader brand strategy will provide brands with a key market advantage in the short term but will become table stakes in the long term. A competitive advantage now, may become a defensive threat later if marketers don’t take action and find digital a seat at the brand strategy table.
About Millward Brown Digital
Millward Brown Digital is the world's leading digital expert in helping clients grow great brands. Millward Brown Digital delivers comprehensive digital solutions to help advertisers, agencies and publishers increase marketing effectiveness and drive brand growth. Integrated behavioral and attitudinal solutions help marketers identify, understand and engage consumers, plan and optimize media and increase total brand performance. Millward Brown Digital operates within Millward Brown North America and is part of Kantar, WPP's data investment management division.

For more information please visit www.millwardbrown.com/digital or contact us at digitalsolutions@millwardbrown.com.

About Millward Brown
Millward Brown is a leading global research agency specializing in advertising effectiveness, strategic communication, media and brand equity research. Millward Brown helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions. Specialist global practices include Millward Brown Digital (a leader in digital effectiveness and intelligence), Millward Brown Optimor (a strategy consultancy helping companies maximize financial returns on brand and marketing investments), Firefly Millward Brown (our global qualitative network), and a Neuroscience Practice (using neuroscience to optimize the value of traditional research techniques). Millward Brown operates in more than 55 countries and is part of Kantar, WPP's data investment management division.

Learn more at www.millwardbrown.com.