BCG

Talent Revolution

The Talent Revolution Survey
DACH

2016

Context

This document is prepared as an aggregate report on findings from the Talent Revolution Survey – a digital marketing skills benchmarking study.

All assessments presented in this report are based on the following digital marketing skills framework.

Plan	Build Strategy & Plans	Partner Management	Enablers
Act	Digital Content	Digital Targeting	Digital Channels
Measure	Metrics & Measurement	Marketing Analytics	Testing

Responses to an online survey form the basis of all the assessments provided in this report. With the online survey, Marketing employees from the Benelux region are asked to assess their organization's capabilities on a 7-points scale vs. best practices across the skills areas highlighted in the framework above. Survey responses are turned into assessment scores (out of 100) that are presented in this report.

THE BOSTON CONSULTING GROUP

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Overall results

Participant profiles

Results by scope of role

Results by organisation level

Results by role

Results by years of experience

Appendix

THE BOSTON CONSULTING GROUP
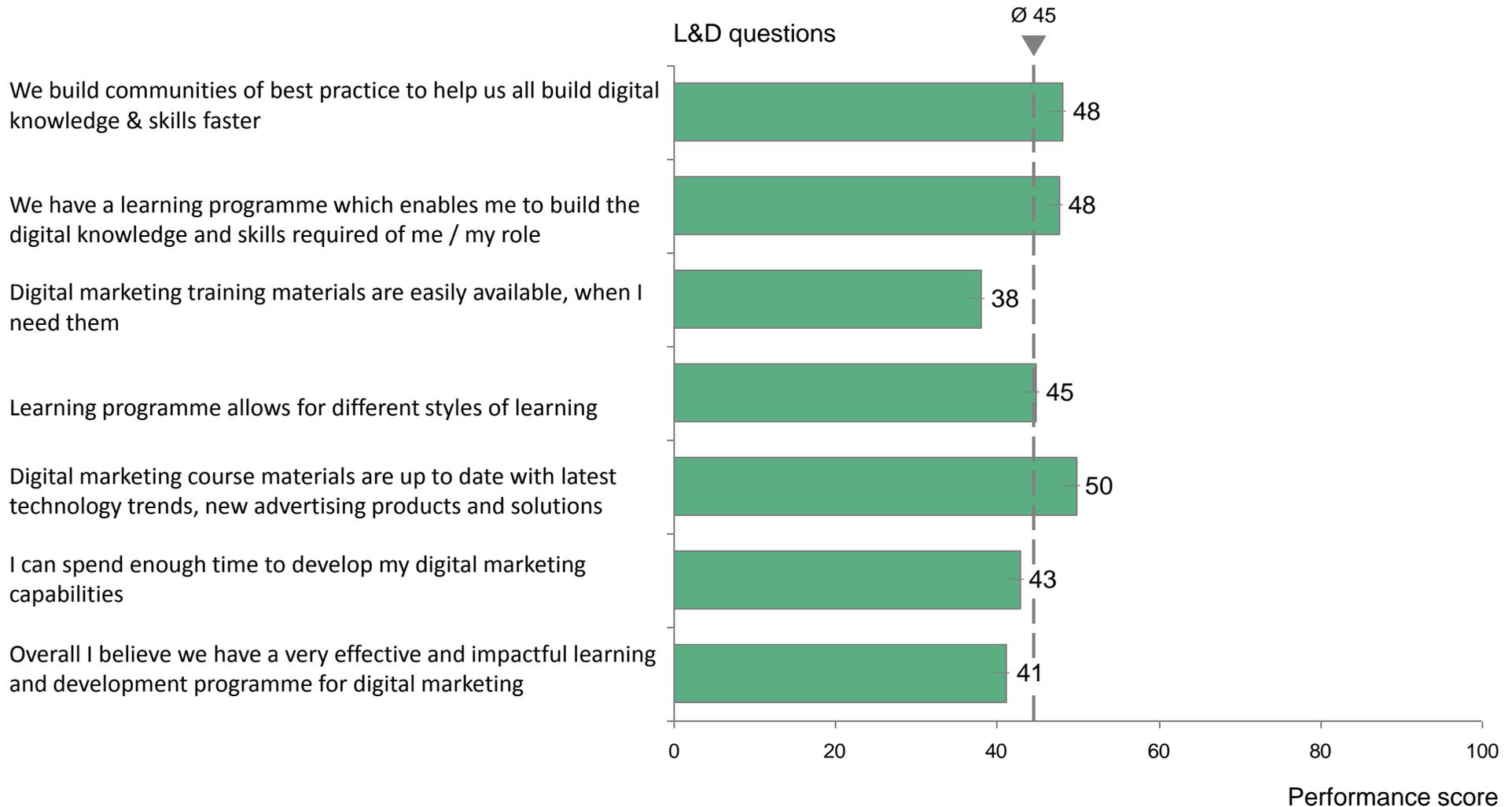
Total scores from participants from DACH – Search and Social Media score high, Mobile and Testing common gaps
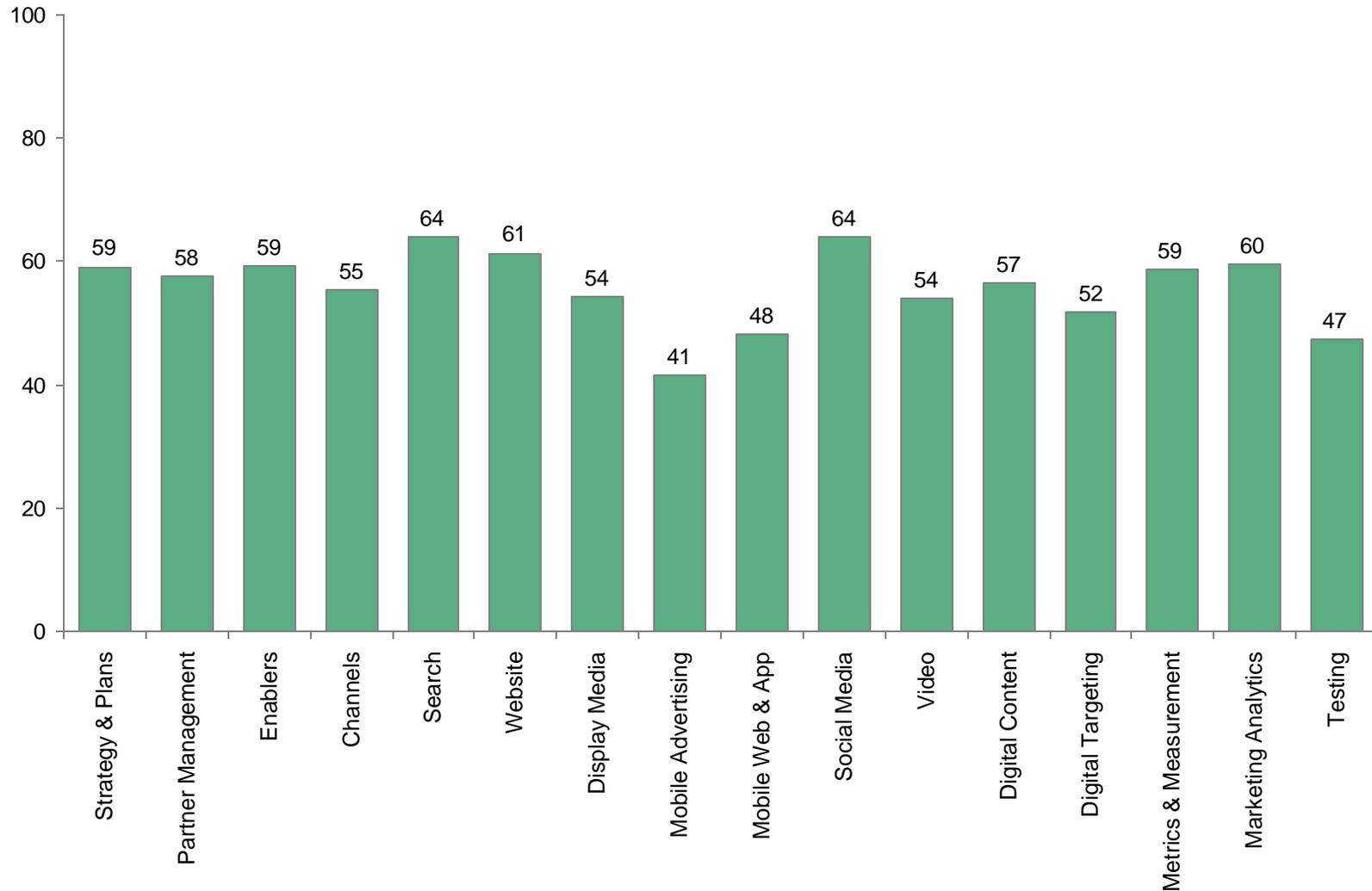
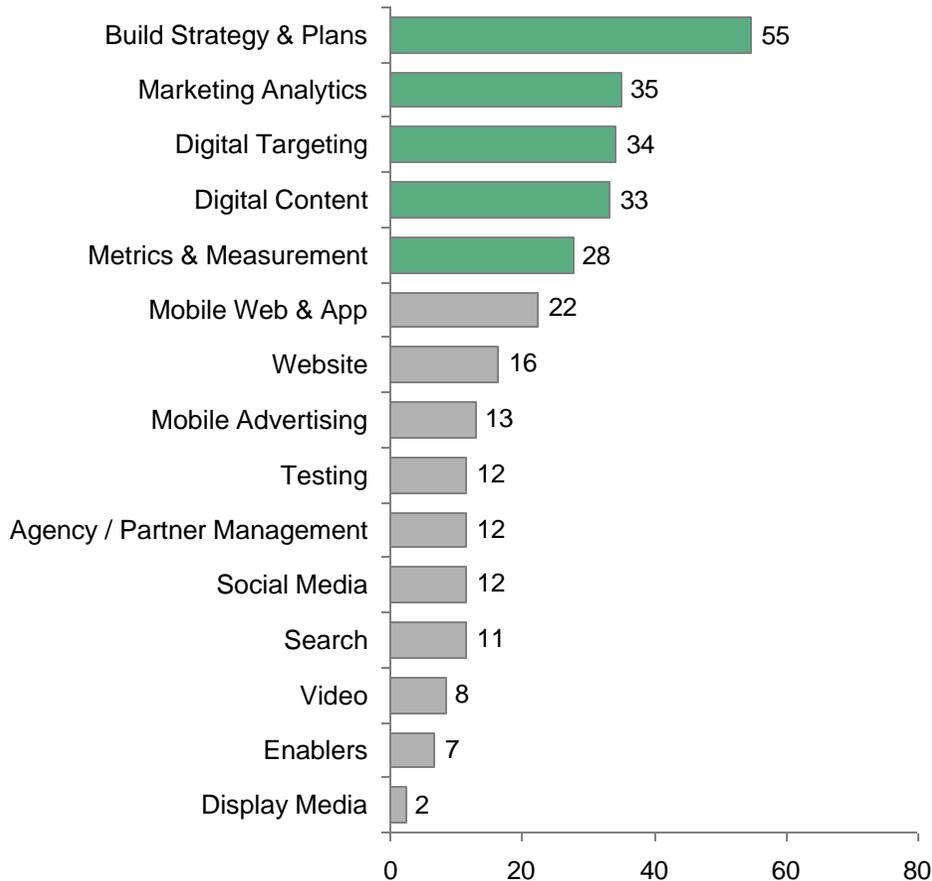# Satisfaction level with digital marketing related L&D activities seem low overall

L&D questions

Ø 45

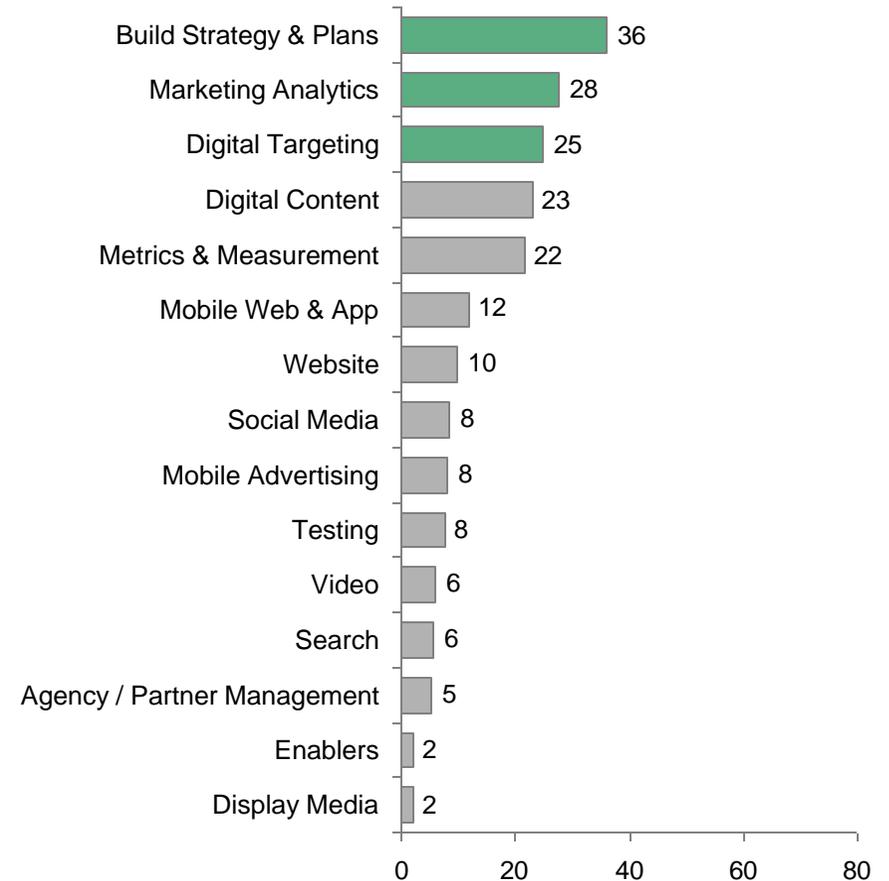| Question	Performance score
We build communities of best practice to help us all build digital knowledge & skills faster	48
We have a learning programme which enables me to build the digital knowledge and skills required of me / my role	48
Digital marketing training materials are easily available, when I need them	38
Learning programme allows for different styles of learning	45
Digital marketing course materials are up to date with latest technology trends, new advertising products and solutions	50
I can spend enough time to develop my digital marketing capabilities	43
Overall I believe we have a very effective and impactful learning and development programme for digital marketing	41

Performance score

Note: Agreement scale where 0 is don't know and 100 is strongly agree

Plans for more digital consumers, Marketing Analytics and Digital Targeting seen critical in both short and mid-term

Top 5 capabilities most important to success over the next 3 years[1]

Capability	Value
Build Strategy & Plans	55
Marketing Analytics	35
Digital Targeting	34
Digital Content	33
Metrics & Measurement	28
Mobile Web & App	22
Website	16
Mobile Advertising	13
Testing	12
Agency / Partner Management	12
Social Media	12
Search	11
Video	8
Enablers	7
Display Media	2

Top 3 capabilities teams need to develop this year[2]

Capability	Value
Build Strategy & Plans	36
Marketing Analytics	28
Digital Targeting	25
Digital Content	23
Metrics & Measurement	22
Mobile Web & App	12
Website	10
Social Media	8
Mobile Advertising	8
Testing	8
Video	6
Search	6
Agency / Partner Management	5
Enablers	2
Display Media	2

1. When thinking about your organisation over the next 3 years, which of the following digital marketing capabilities will be most important for your success? (Please pick top 5)
2. Thinking about your immediate team, what are the most important 3 capabilities you need to develop this year?

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Results by role

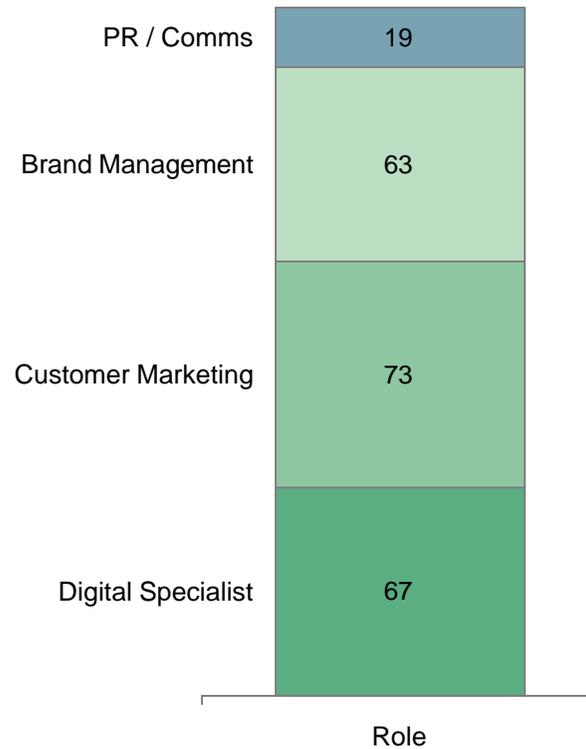Results by years of experience

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Participant profile overview – scope, role, level

THE BOSTON CONSULTING GROUP
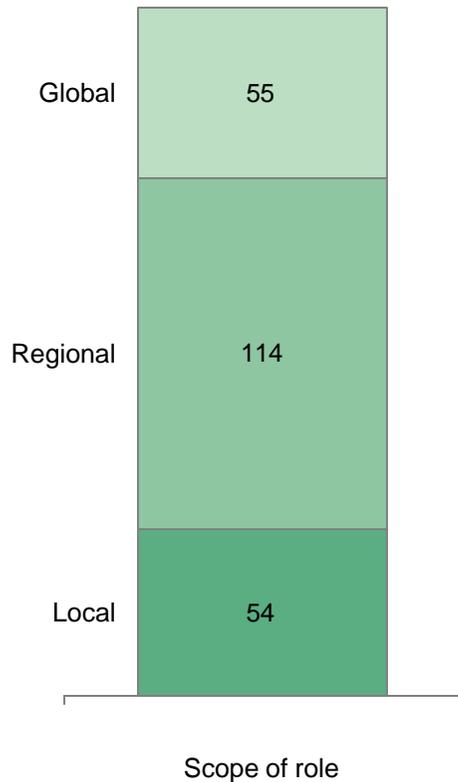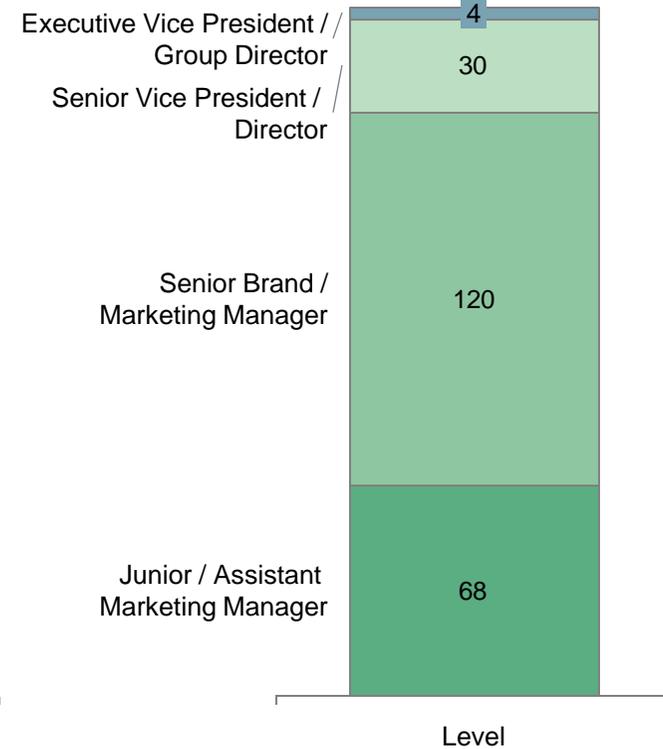
Participant profile overview – years of experience

Marketing Experience

9.3

Value	Category
80	
83	
53	
7	

Digital Marketing Experience

5.5

Value	Category
29	More than 10 years
58	Between 5 and 10 Years
89	Between 2 and 5 Years
47	2 Years or Less
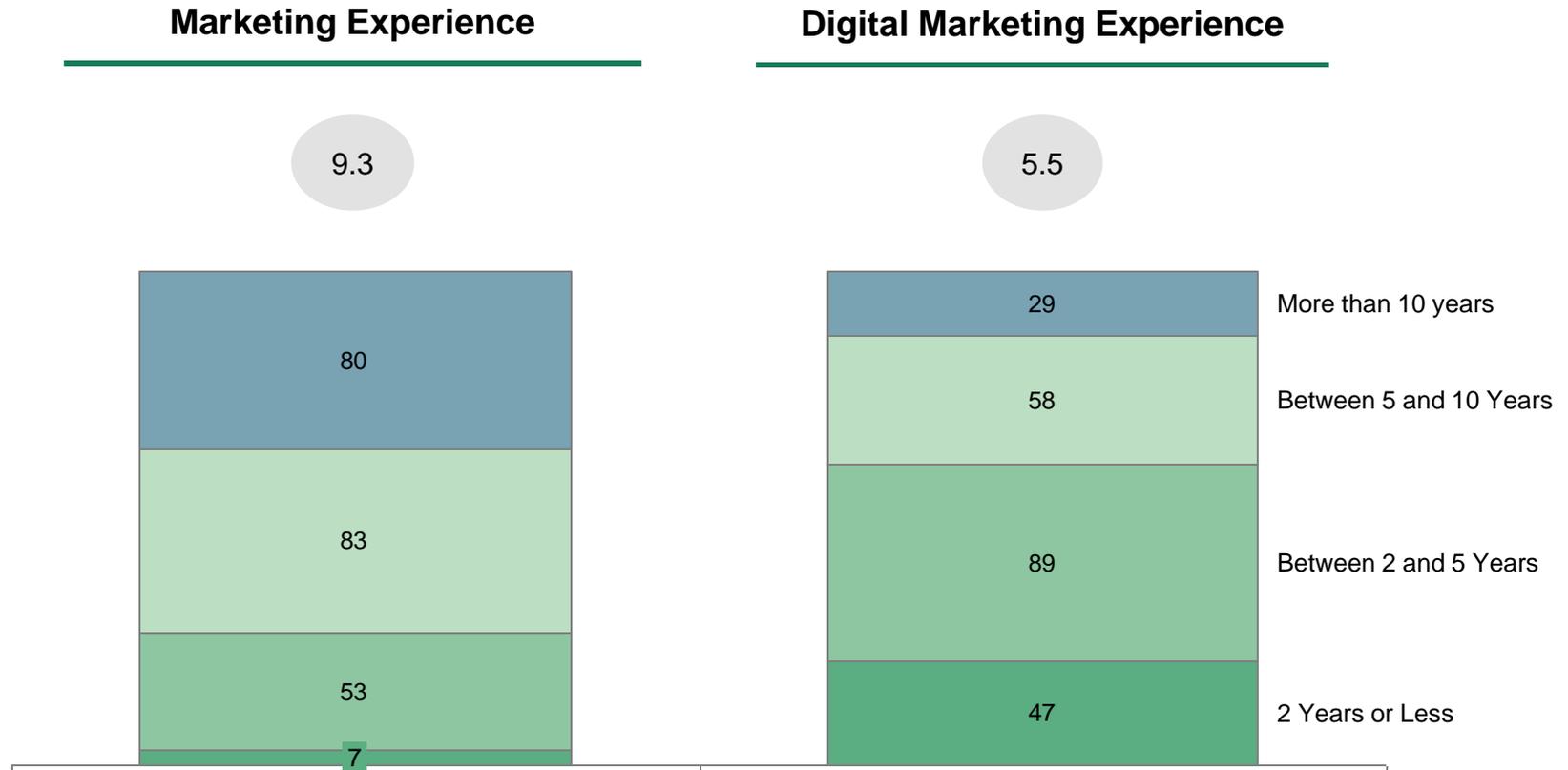
X.X   Average years of experience

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Participants are frequent users of Social Media and Mobile/ Tablets while more than 50% do not play mobile games
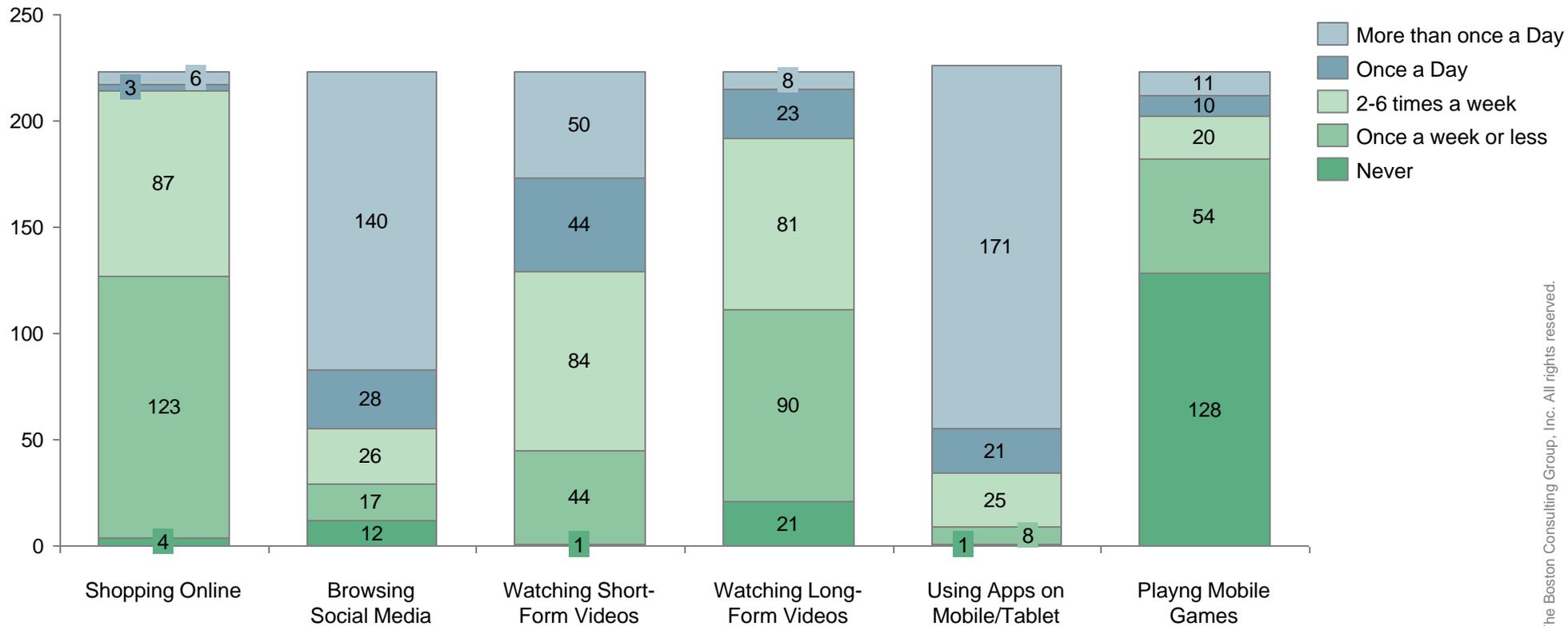
Legend:
- More than once a Day
- Once a Day
- 2-6 times a week
- Once a week or less
- Never

Shopping Online: 6, 3, 87, 123, 4
Browsing Social Media: 140, 28, 26, 17, 12
Watching Short-Form Videos: 50, 44, 84, 44, 1
Watching Long-Form Videos: 8, 23, 81, 90, 21
Using Apps on Mobile/Tablet: 171, 21, 25, 1, 8
Playng Mobile Games: 11, 10, 20, 54, 128

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Overall results by scope of role – Local roles most optimistic overall

Legend:
- + 1 STD Dev
- Score
- - 1 STD Dev

Bars:
- Global: 56
- Regional: 57
- Local: 66
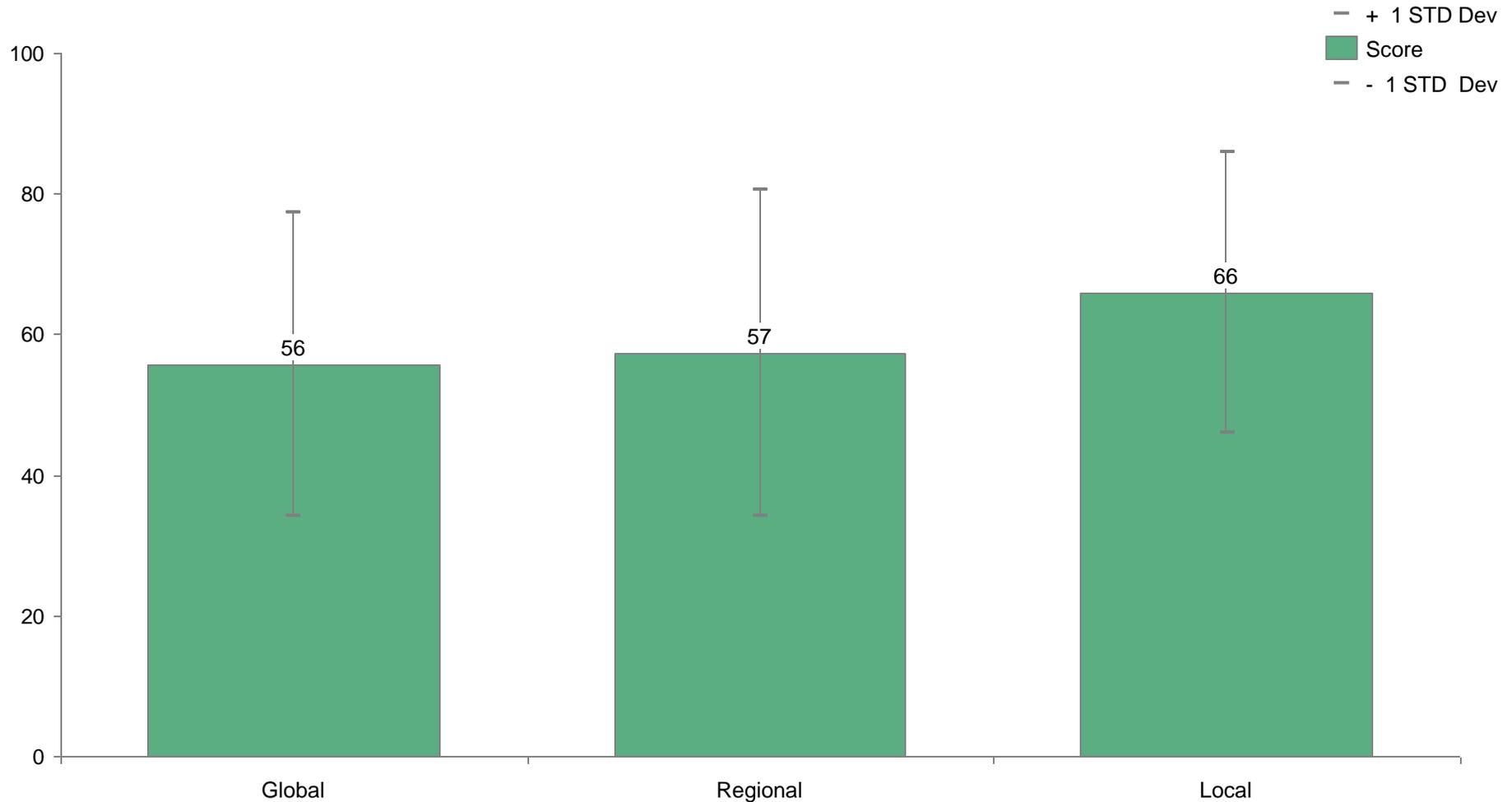
Note: Scores are based on responses from 223 participants split as follows: Global: 55, Regional: 114, Local: 54

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PLAN results by scope of role – consistent assessment of Partner Management across different scopes
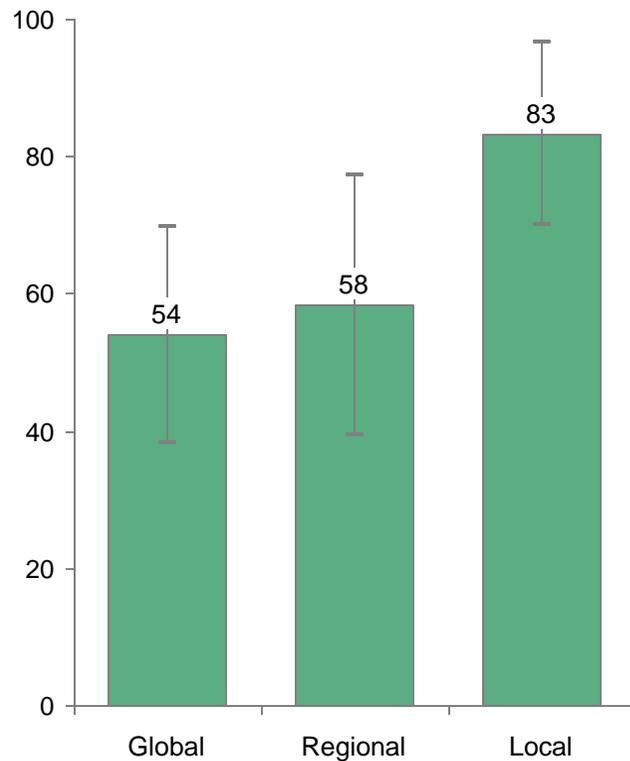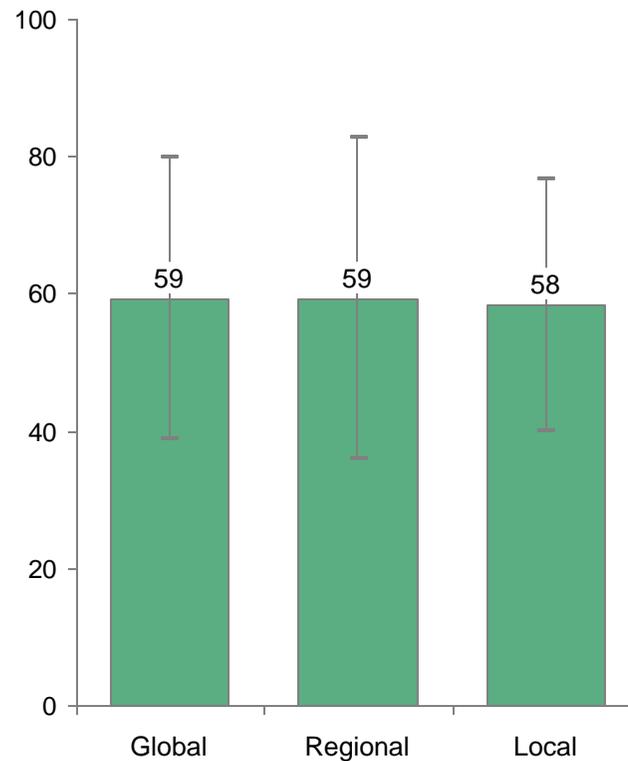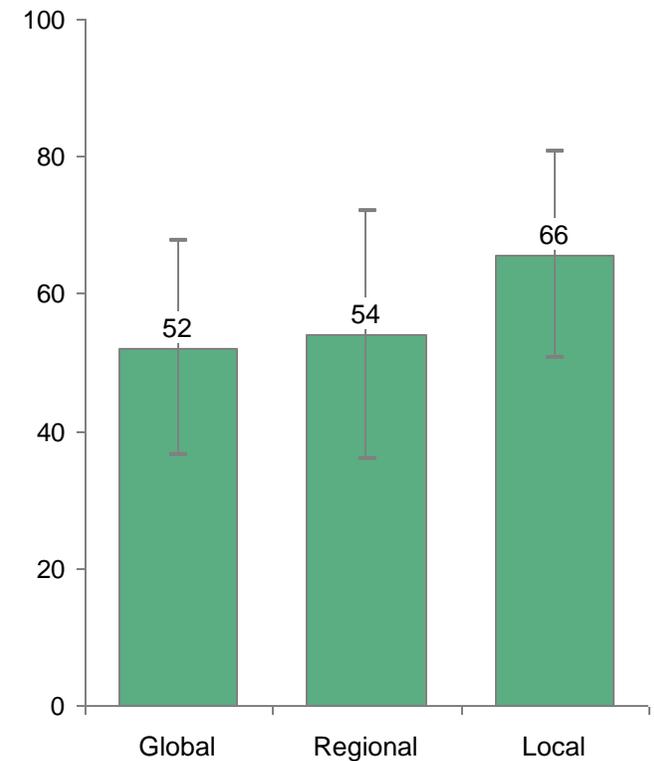
ACT results by scope of role – Most significant differences in assessment of Digital Content skills

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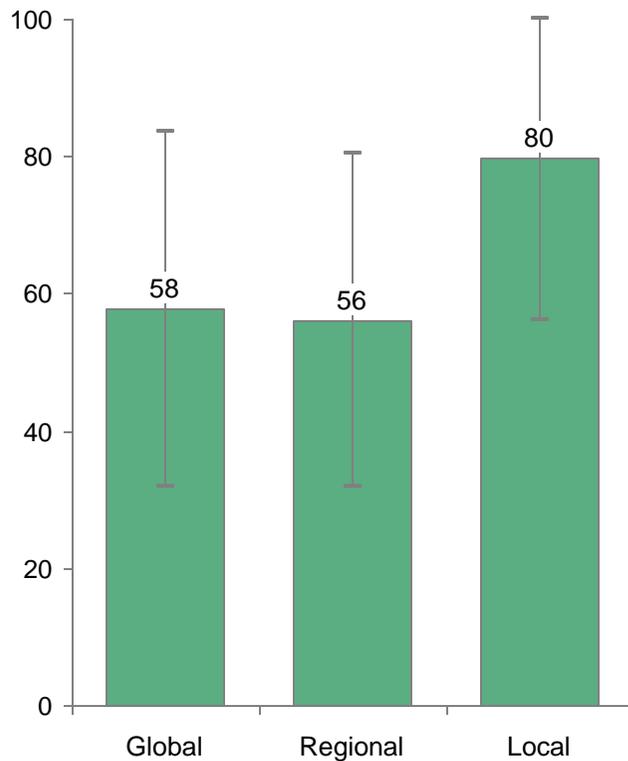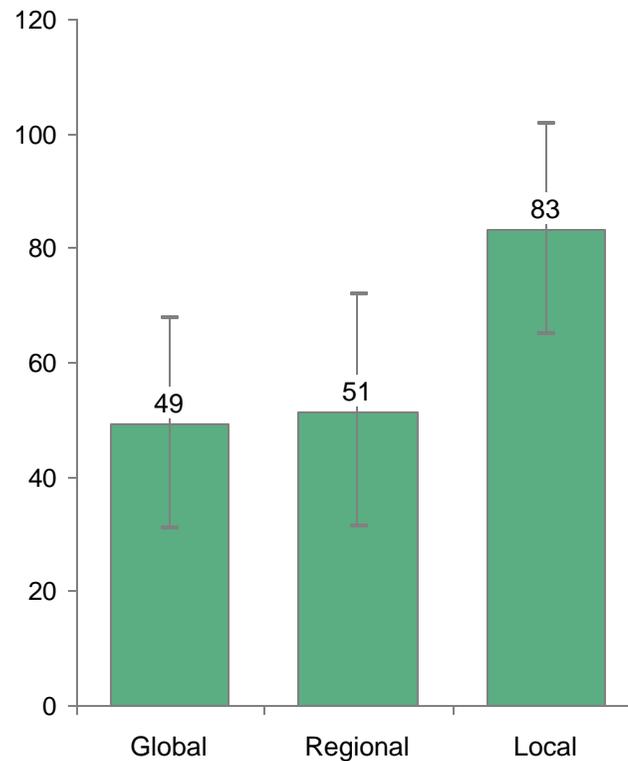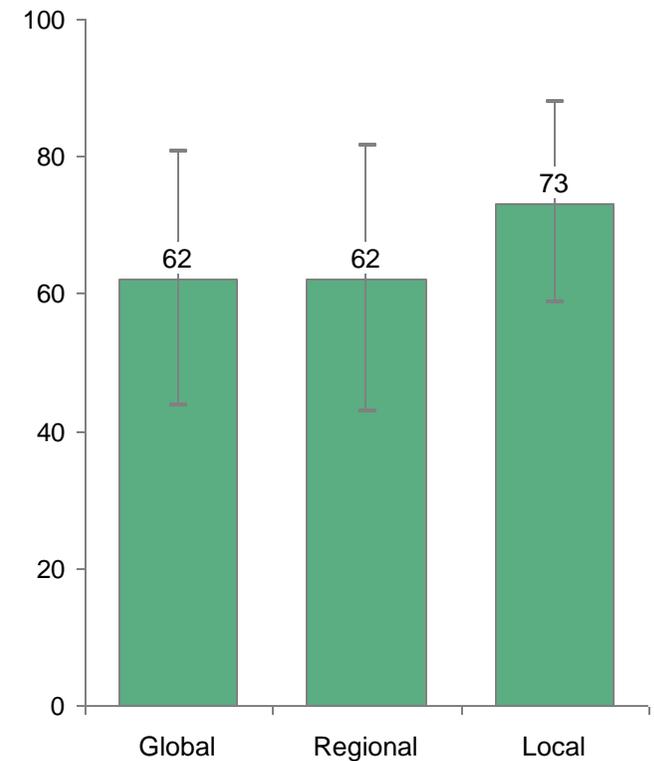
Channels breakdown by scope or role – Local roles highly optimistic regarding Social Media capabilities

| Channels	Global	Regional	Local
Search	**58.1**	59.2	60.4
Website	53.2	52.0	80.2
Display Media	**38.2**	**41.0**	80.2
Mobile Advertising	43.1	47.6	66.7
Mobile Web & App	60.5	**62.8**	**50.0**
Social Media	48.3	52.7	**94.8**
Video	53.9	55.3	80.0
Channels_Total	**62.2**	**62.2**	**73.2**

Shows the lowest assessment scores
Shows highest assessment scores

MEASURE results by scope of role – Global and Regional relatively consistent, Local most optimistic across the board
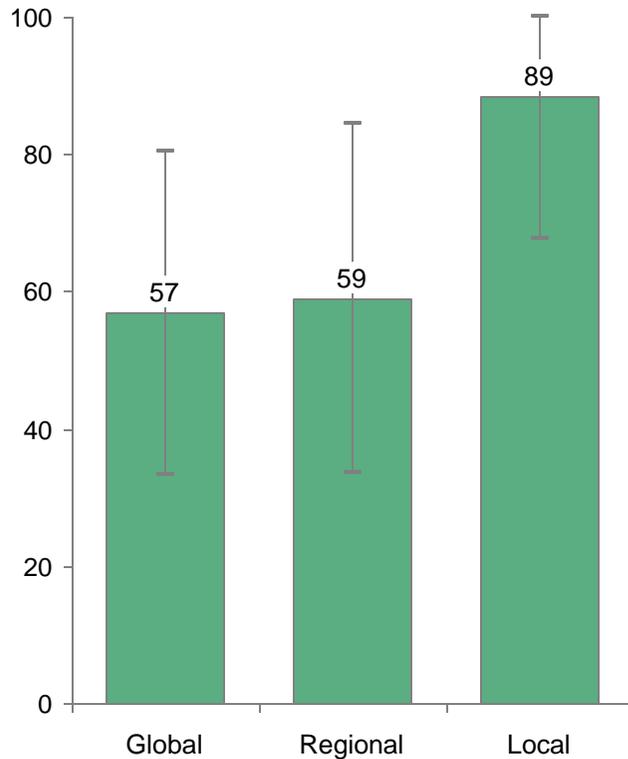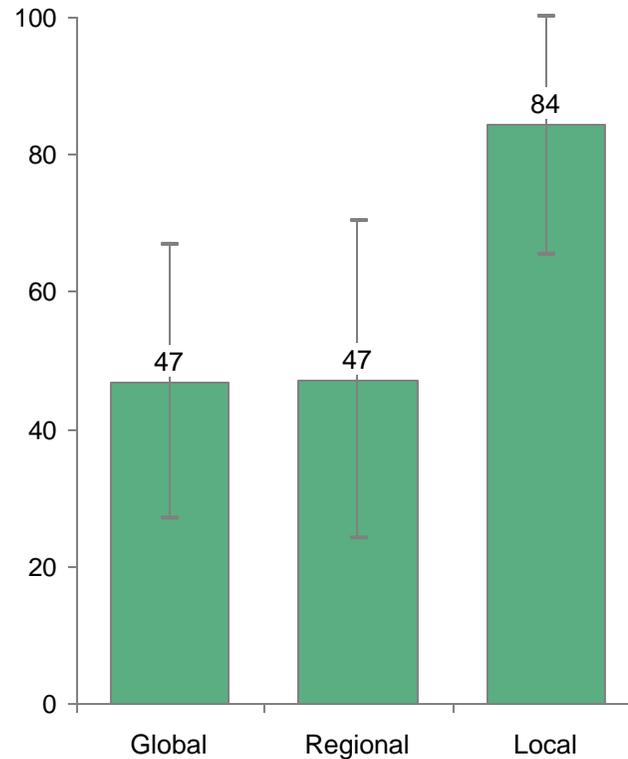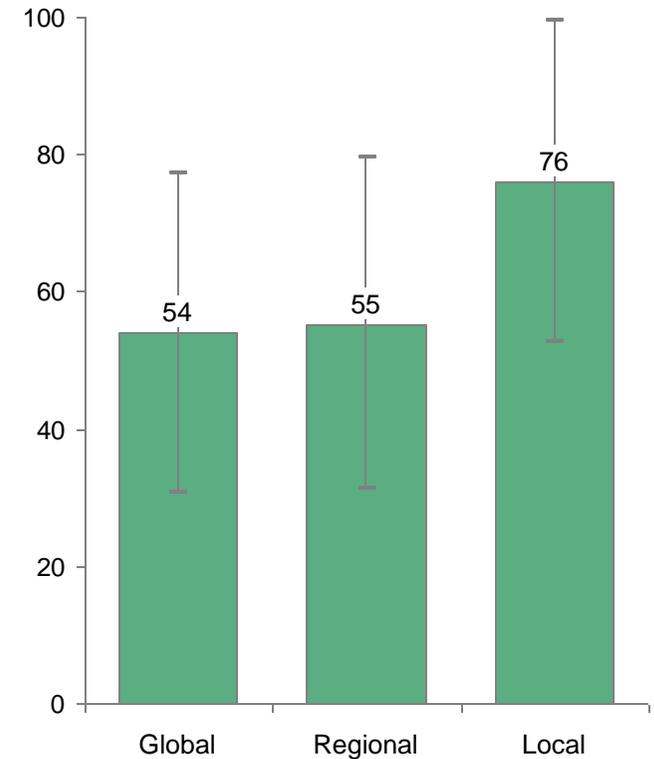
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Participant profiles

Results by scope of role

Results by organisation level

Results by role

Results by years of experience

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Overall results by org level – Senior roles most optimistic overall, while junior roles at the other end of the spectrum
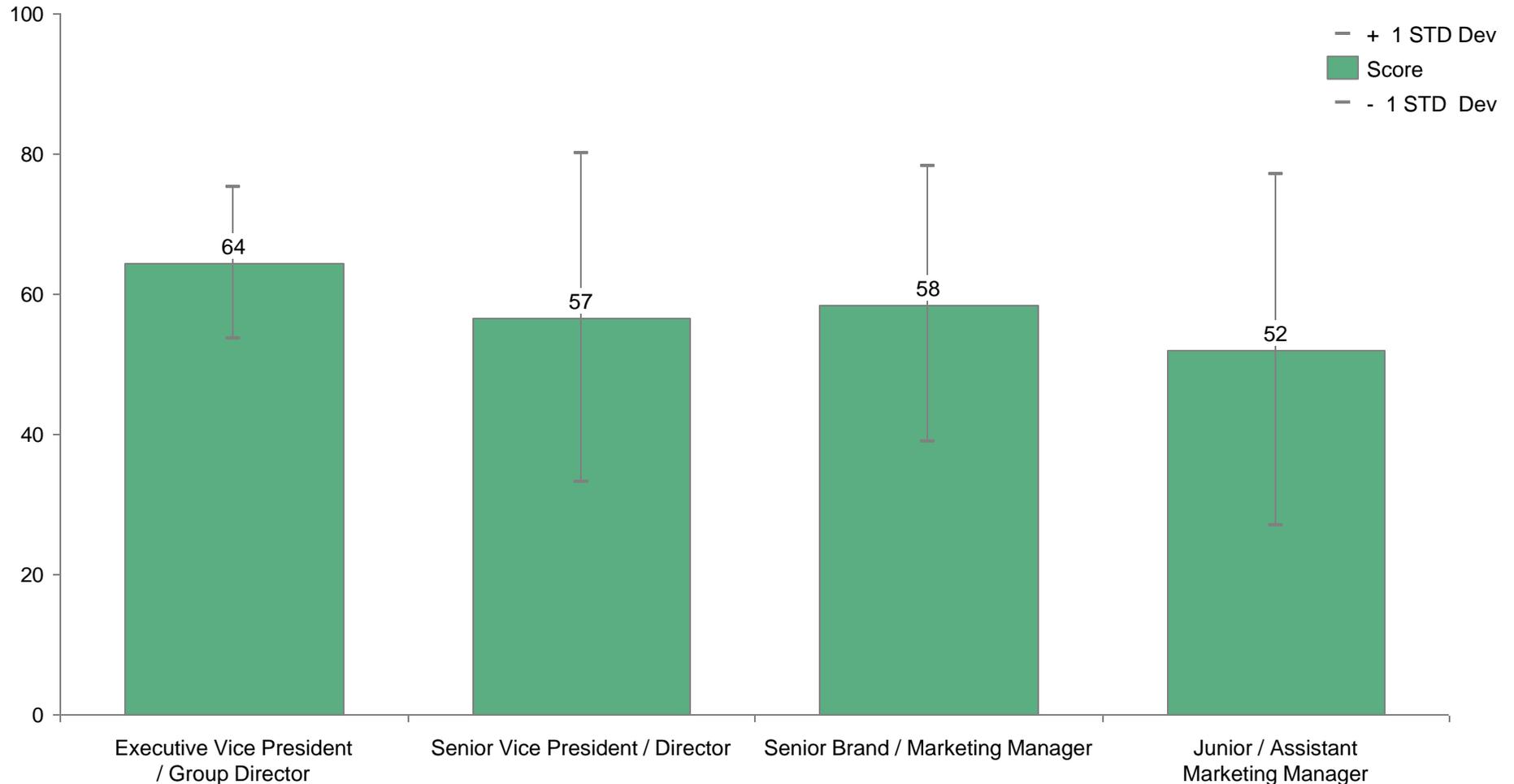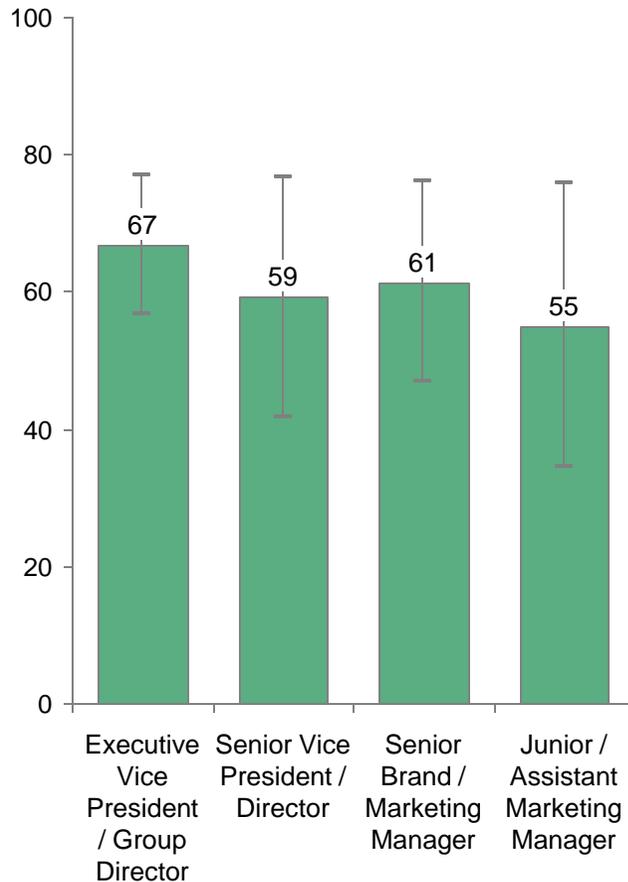

Note: Scores are based on responses from 223 participants split as follows: EVP/Group Director: 4, SVP/Director: 30, Senior Brand/Marketing Manager: 120, Junior/Assistant Marketing Manager: 69
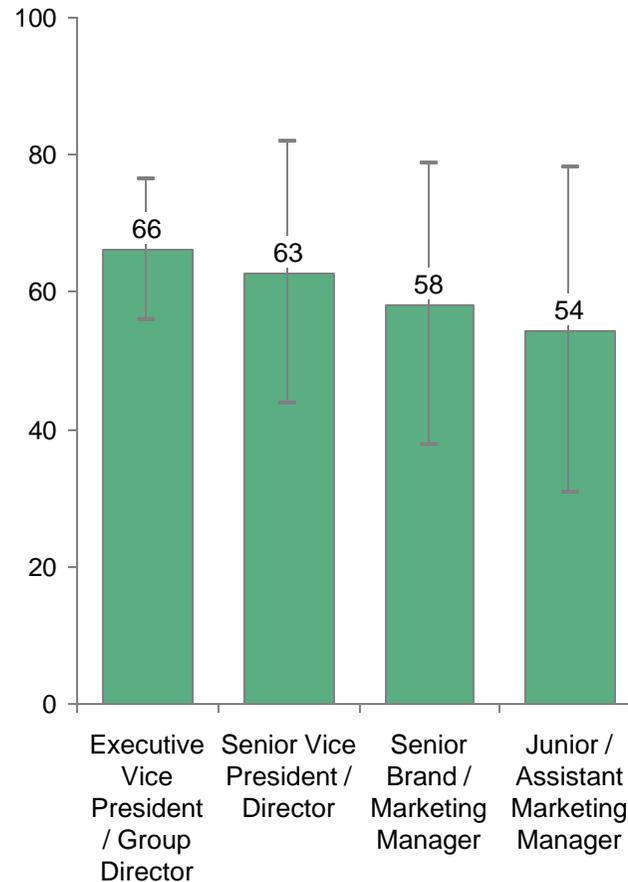
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PLAN results by org level – Junior roles are most pessimistic across all PLAN capabilities

Build Strategy & Plans

Partner Management

Enablers

Legend:
- + 1 STD Dev
- Score
- - 1 STD Dev

Build Strategy & Plans:
- Executive Vice President / Group Director: 67
- Senior Vice President / Director: 59
- Senior Brand / Marketing Manager: 61
- Junior / Assistant Marketing Manager: 55

Partner Management:
- Executive Vice President / Group Director: 66
- Senior Vice President / Director: 63
- Senior Brand / Marketing Manager: 58
- Junior / Assistant Marketing Manager: 54

Enablers:
- Executive Vice President / Group Director: 66
- Senior Vice President / Director: 63
- Senior Brand / Marketing Manager: 61
- Junior / Assistant Marketing Manager: 55

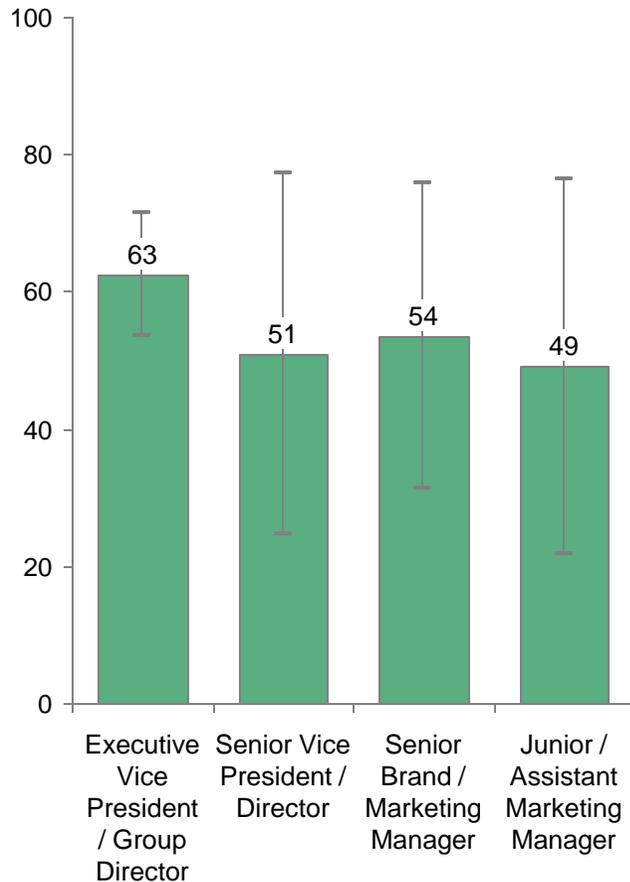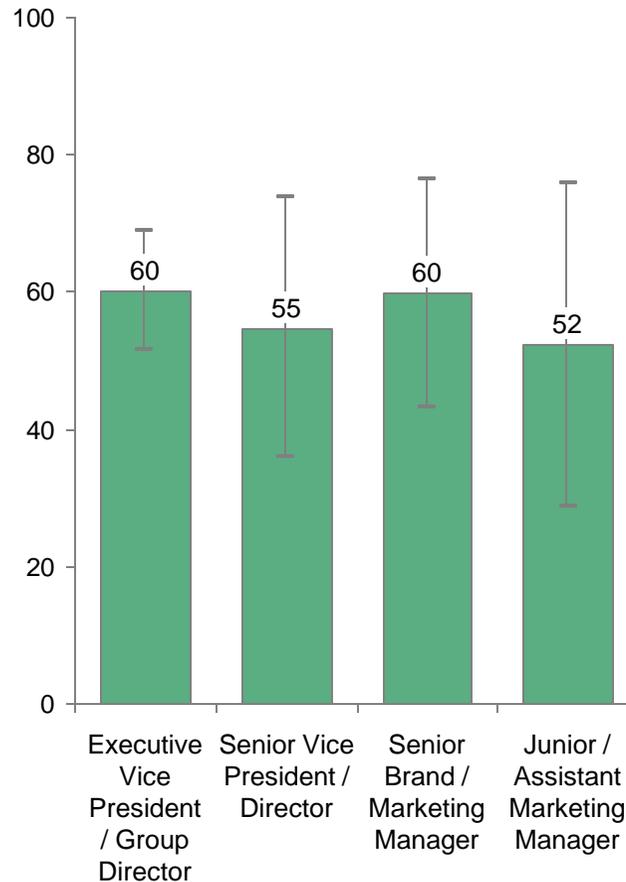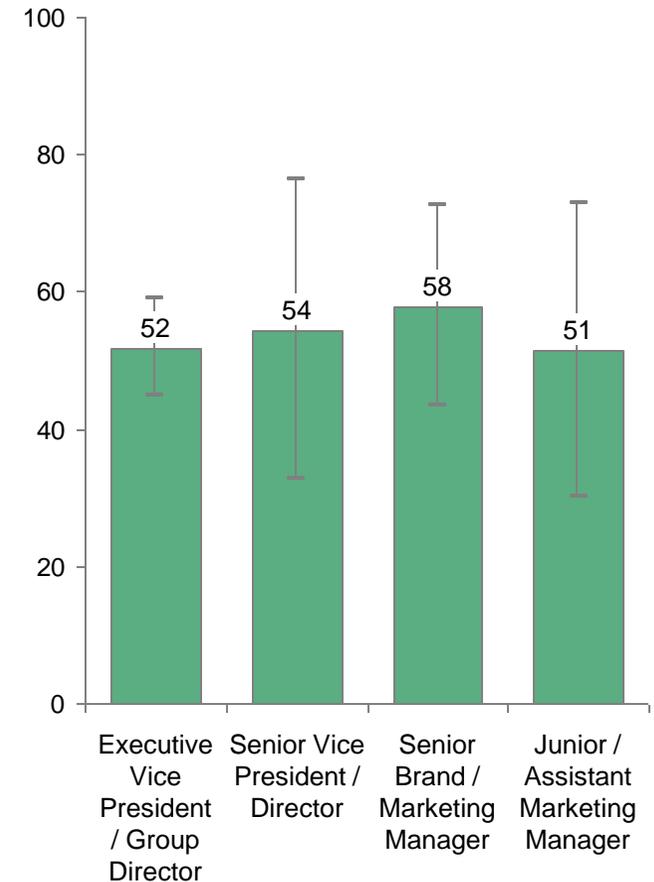# ACT results by org level – Senior leaders among most optimistic regarding ACT capabilities except for Digital Channels

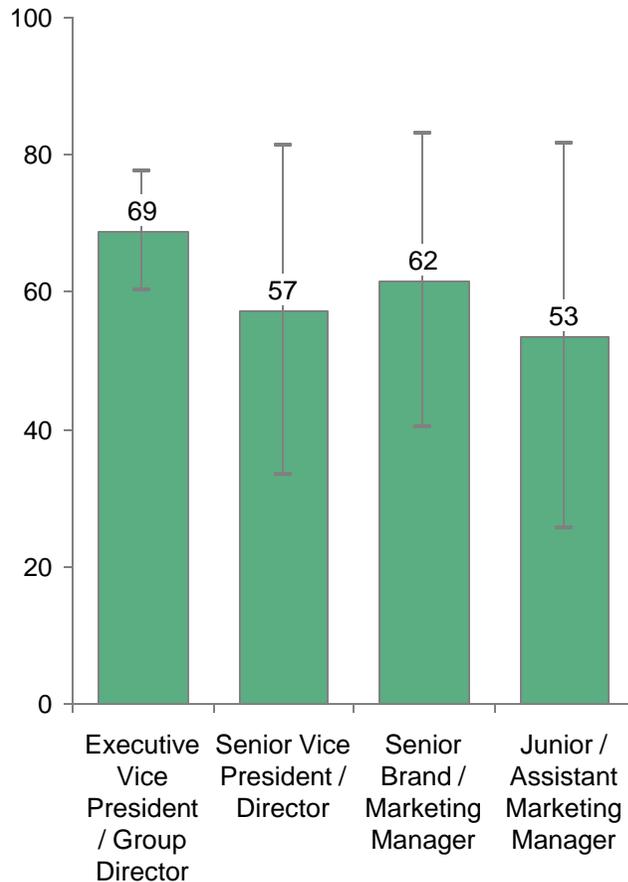# Channel breakdown by org level – Mobile is a common gap across all seniorities

Channels	Executive Vice President / Group Director	Senior Vice President / Director	Senior Brand / Marketing Manager	Junior / Assistant Marketing Manager
Search	**80.2**	**62.9**	**69.2**	54.1
Website	46.9	60.8	63.3	58.7
Display Media	56.3	55.7	57.3	48.5
Mobile Advertising	40.3	**43.7**	**42.0**	**38.9**
Mobile Web & App	**34.7**	47.8	48.7	48.0
Social Media	59.4	59.6	67.2	**61.0**
Video	45.0	50.6	57.6	50.9
Channels_Total	**51.8**	**54.4**	**57.9**	**51.5**

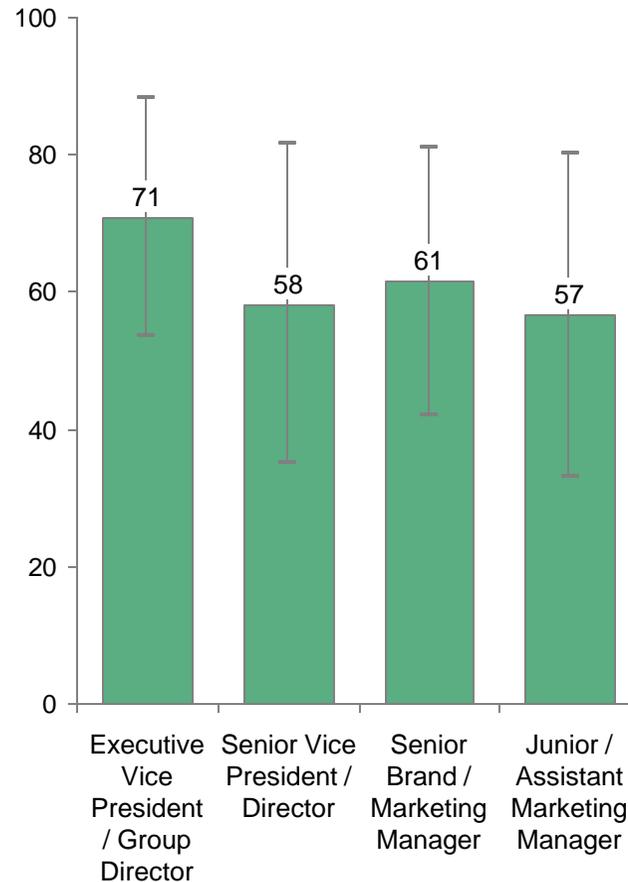Shows the lowest assessment scores
Shows highest assessment scores

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MEASURE results by org level – Testing skills perceived as low by all org levels with the exception of senior leadership
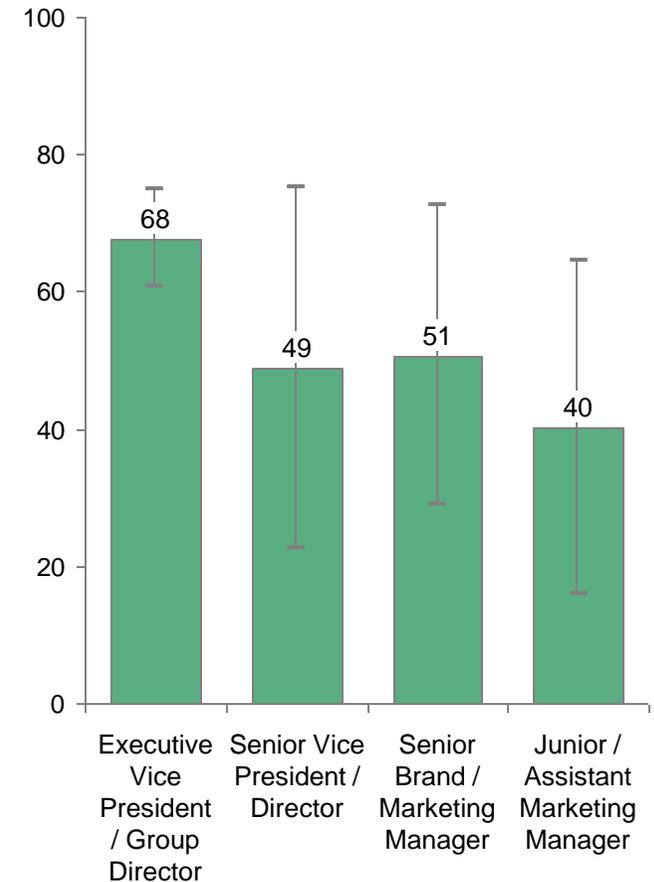
Metrics & Measurement

Org Level	Score
Executive Vice President / Group Director	69
Senior Vice President / Director	57
Senior Brand / Marketing Manager	62
Junior / Assistant Marketing Manager	53

Marketing Analytics

Org Level	Score
Executive Vice President / Group Director	71
Senior Vice President / Director	58
Senior Brand / Marketing Manager	61
Junior / Assistant Marketing Manager	57

Testing

Org Level	Score
Executive Vice President / Group Director	68
Senior Vice President / Director	49
Senior Brand / Marketing Manager	51
Junior / Assistant Marketing Manager	40

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Overall results

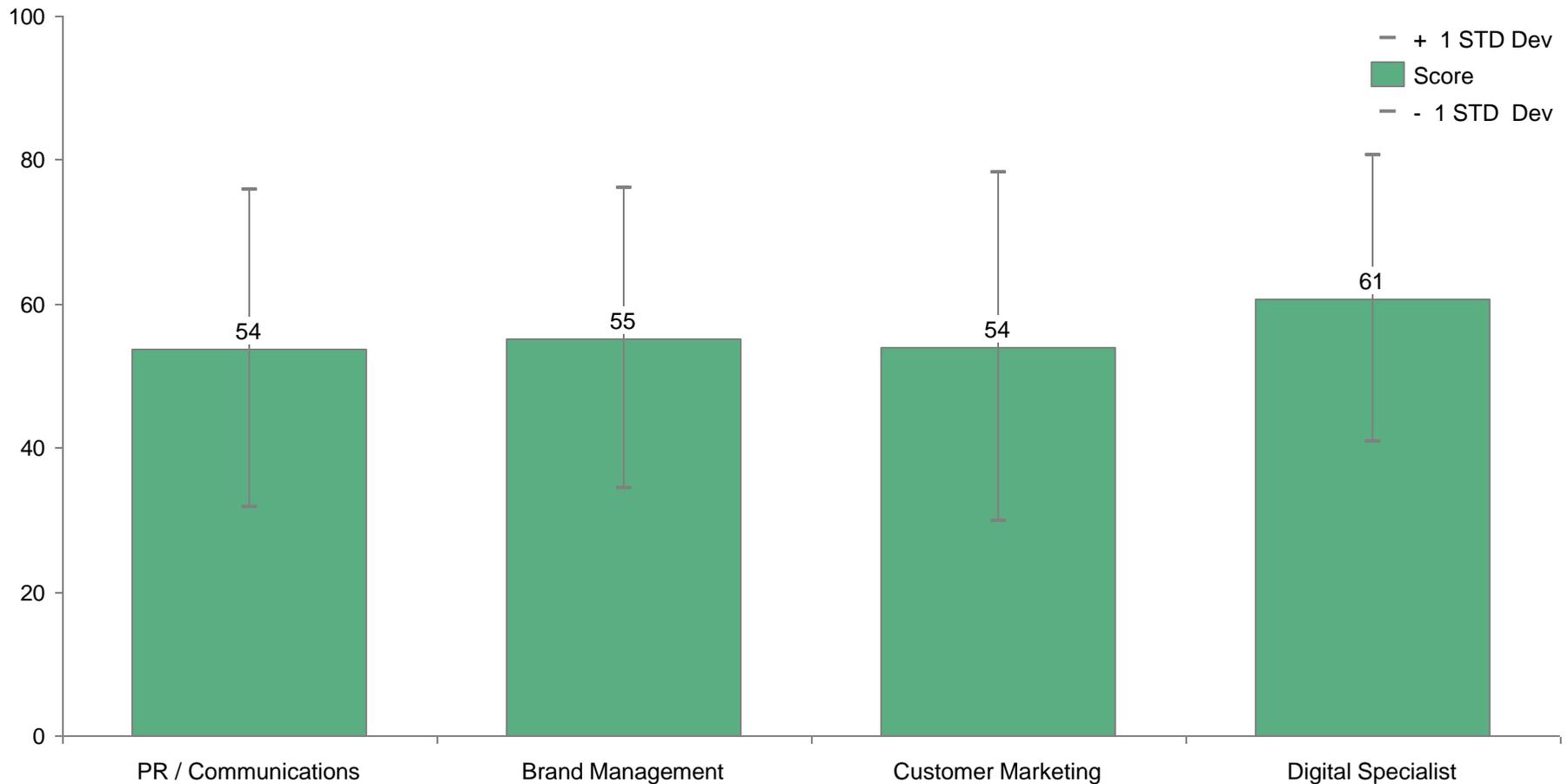Participant profiles

Results by scope of role

Results by organisation level

Results by role

Results by years of experience

Appendix

Overall results by role – Digital specialists most optimistic overall
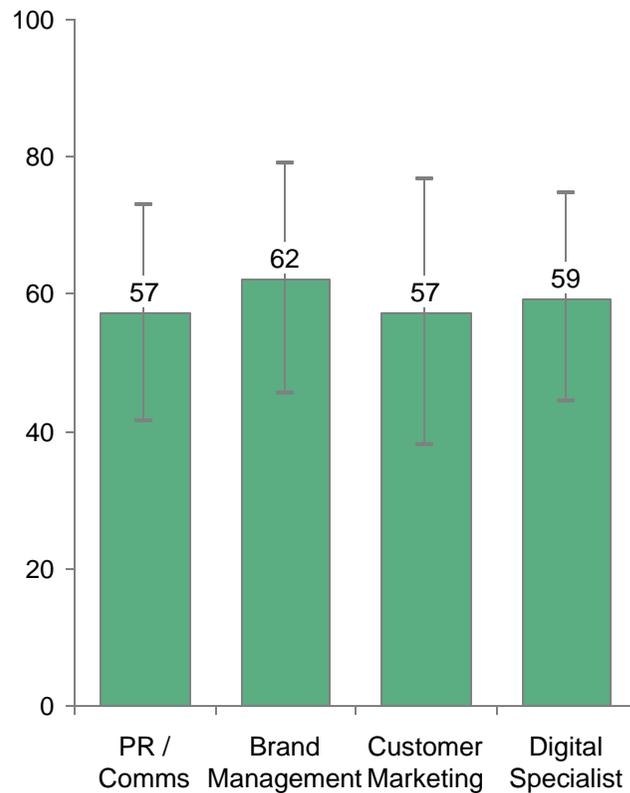

Note: Scores are based on responses from 223 participants split as follows: PR/Communication: 20, Brand Management: 63, Customer Marketing: 73, Digital Specialist: 67
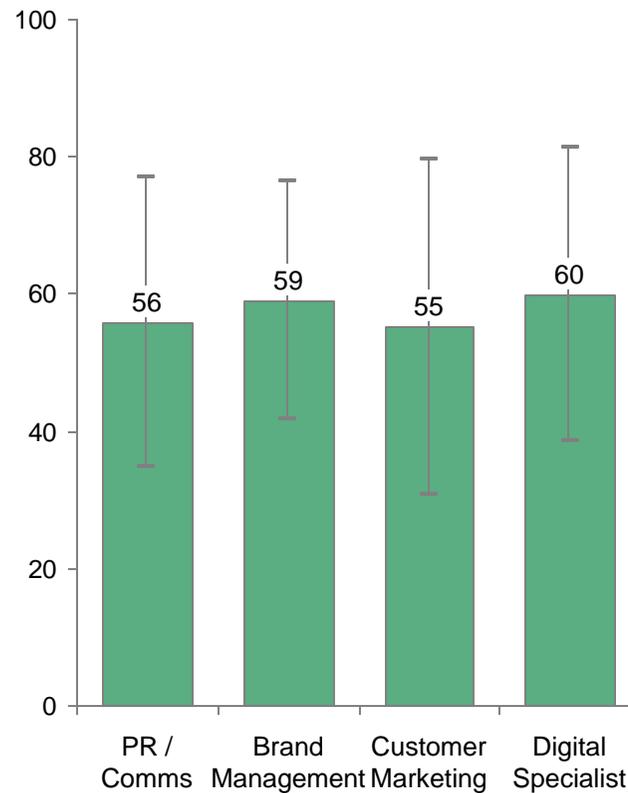
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PLAN results by role – relatively consistent assessment across all PLAN categories

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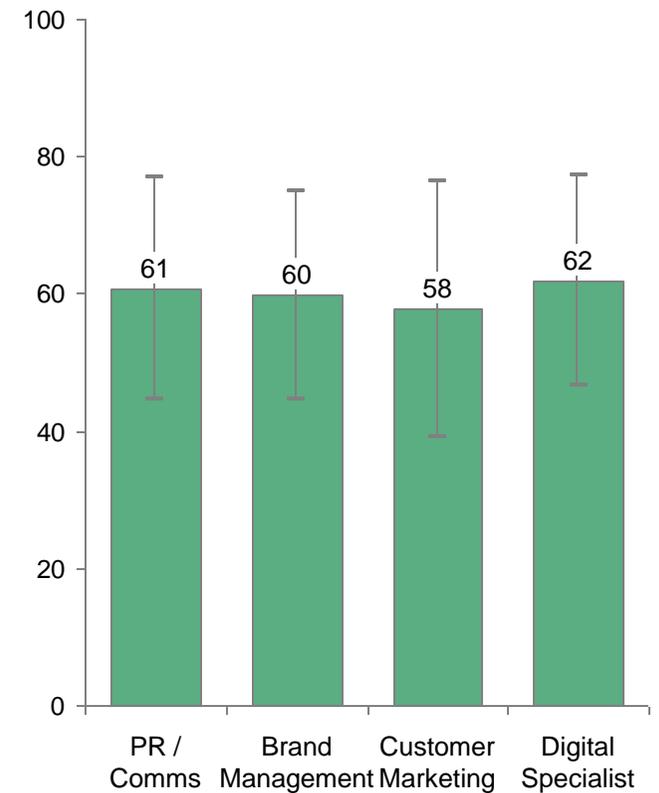
ACT results by role – Digital Specialists score high across all ACT categories
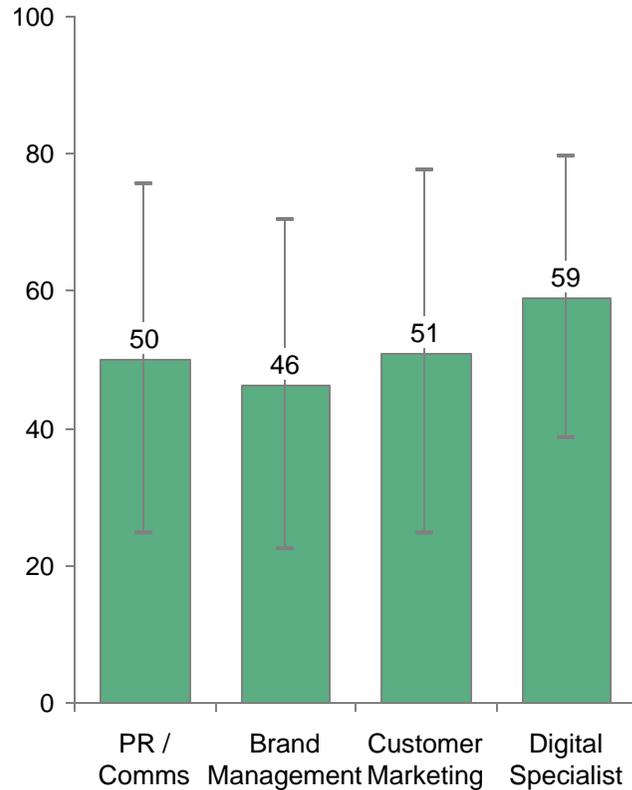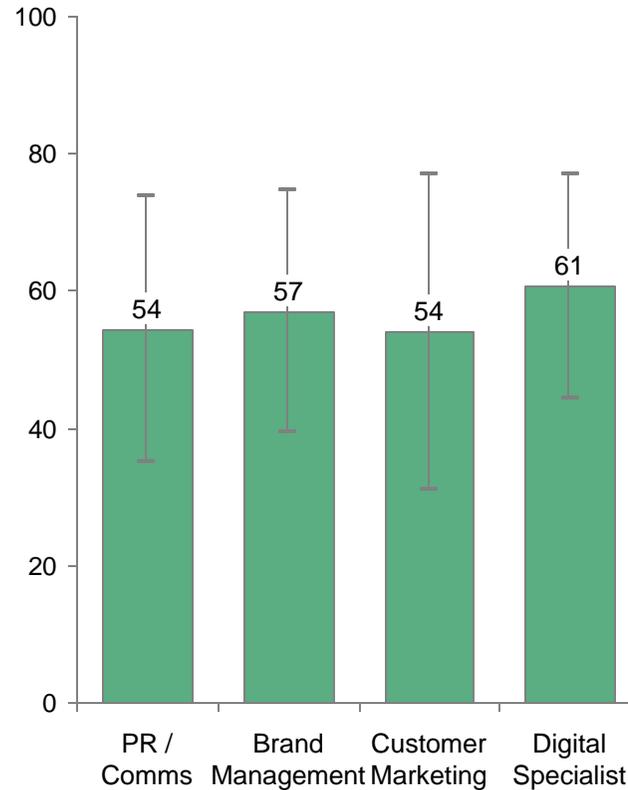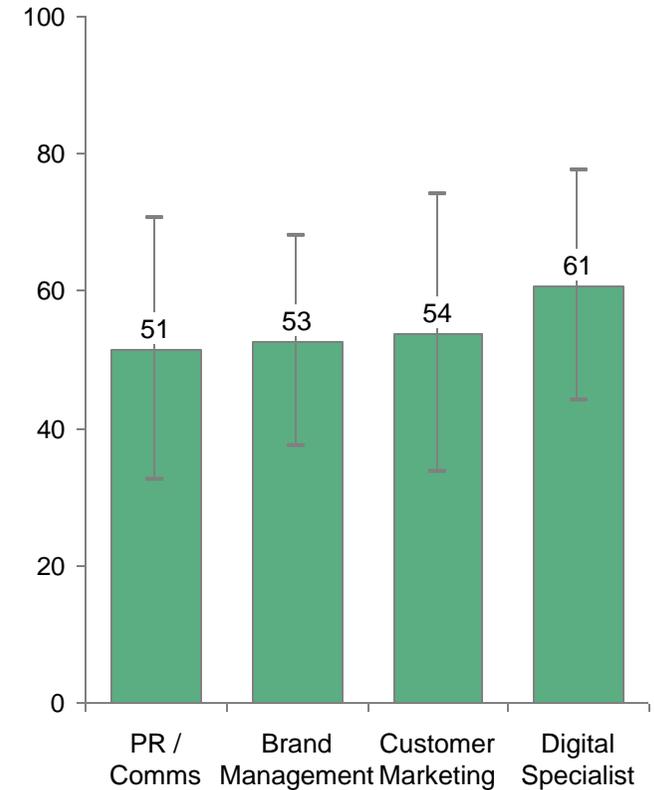
Channels breakdown by role – all roles most pessimistic about Mobile Advertising

Channels	Brand Management	Customer Marketing	Digital Specialist	PR / Communications
Search	57.9	**60.9**	60.0	**72.7**
Website	**59.2**	59.0	60.8	64.6
Display Media	55.3	50.6	55.3	56.6
Mobile Advertising	**35.1**	**38.3**	**40.1**	**47.0**
Mobile Web & App	40.9	41.8	49.5	54.6
Social Media	**59.2**	60.6	**61.1**	72.2
Video	52.5	56.7	49.8	57.7
Channels_Total	**51.4**	**52.6**	**53.8**	**60.8**

Shows the lowest assessment scores
Shows highest assessment scores

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MEASURE results by role – Testing is a challenge for all roles
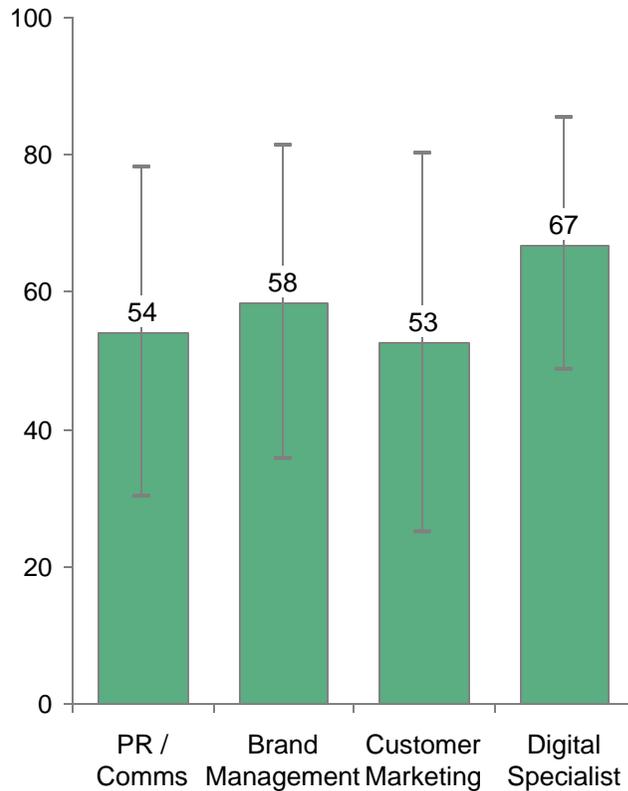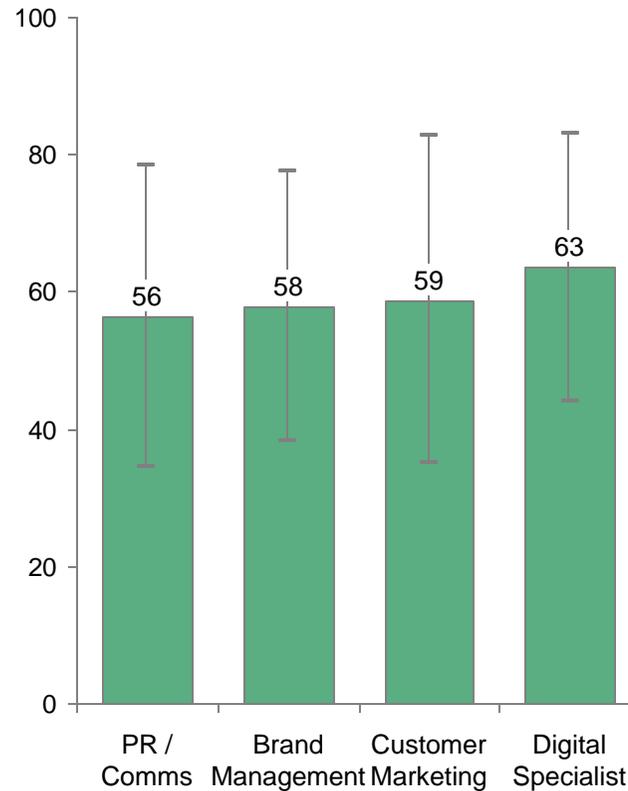
Legend:
- — + 1 STD Dev
- ▉ Score
- — - 1 STD Dev

Metrics & Measurement

Role	Score
PR / Comms	54
Brand Management	58
Customer Marketing	53
Digital Specialist	67

Marketing Analytics

Role	Score
PR / Comms	56
Brand Management	58
Customer Marketing	59
Digital Specialist	63

Testing

Role	Score
PR / Comms	43
Brand Management	44
Customer Marketing	46
Digital Specialist	54

THE BOSTON CONSULTING GROUP
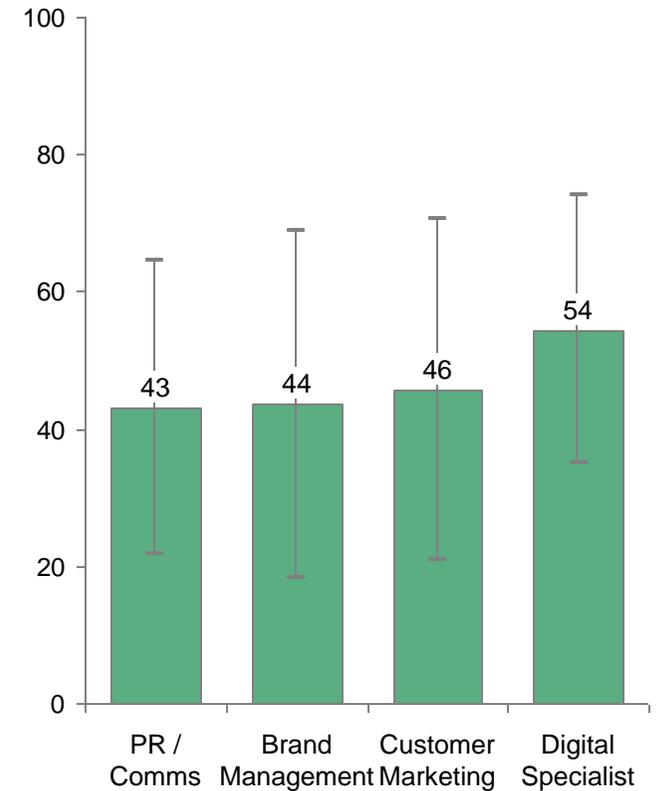
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Overall results
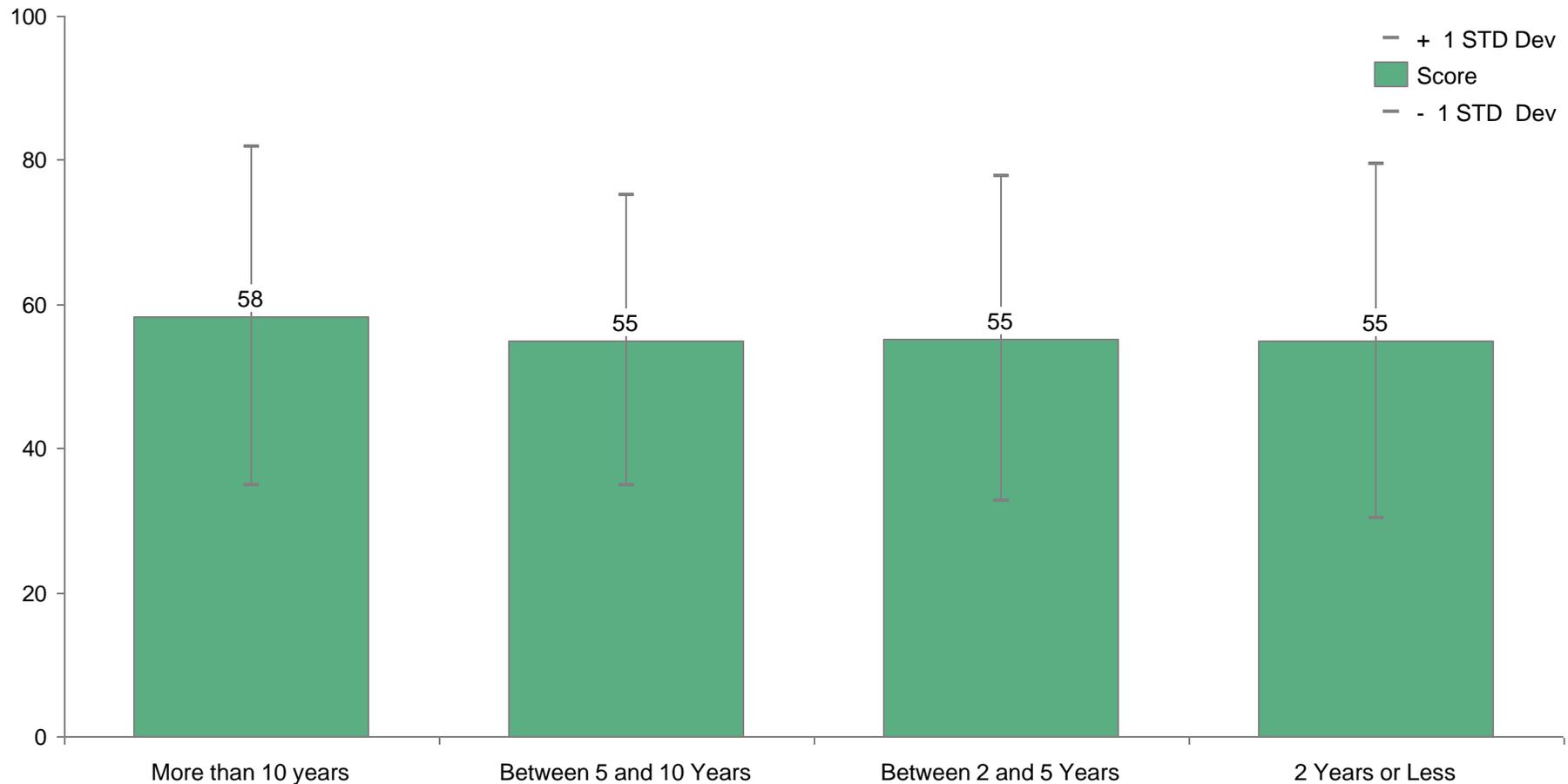
Participant profiles

Results by scope of role

Results by organisation level

Results by role

Results by years of experience (Marketing)

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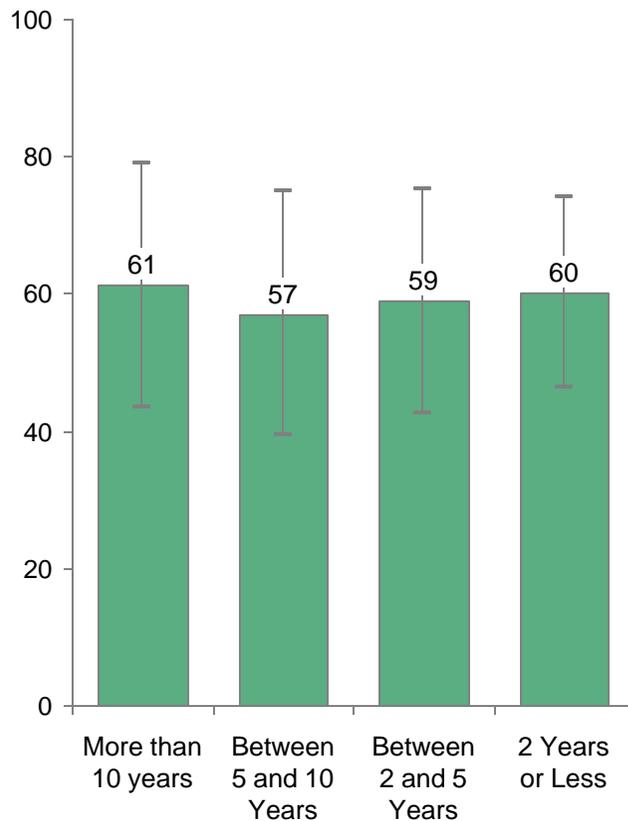# Overall results by years of experience (Marketing) – little difference between different experience levels overall

Note: Scores are based on responses from 223 participants split as follows: > 10 years:80, 5 to 10: 83, 2 to 5: 53, <2: 7
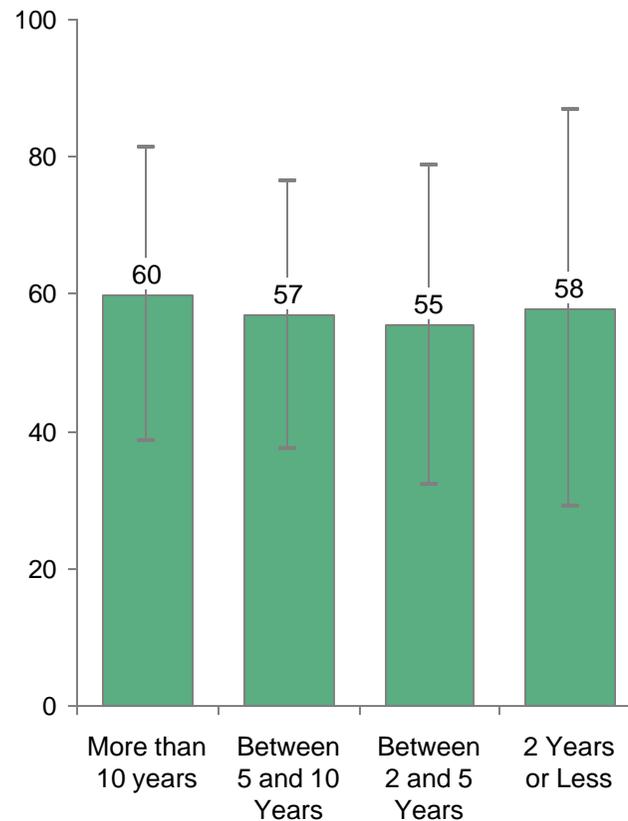
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PLAN results by years of experience (Marketing) – participants with little experience lift the average in PLAN skills

Build Strategy & Plans

More than 10 years	Between 5 and 10 Years	Between 2 and 5 Years	2 Years or Less
61	57	59	60

Partner Management

More than 10 years	Between 5 and 10 Years	Between 2 and 5 Years	2 Years or Less
60	57	55	58

Enablers

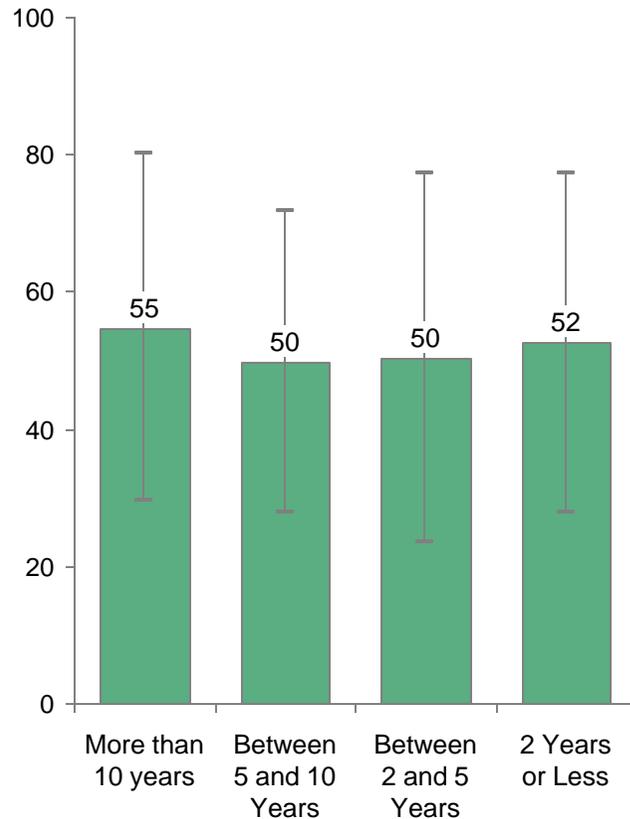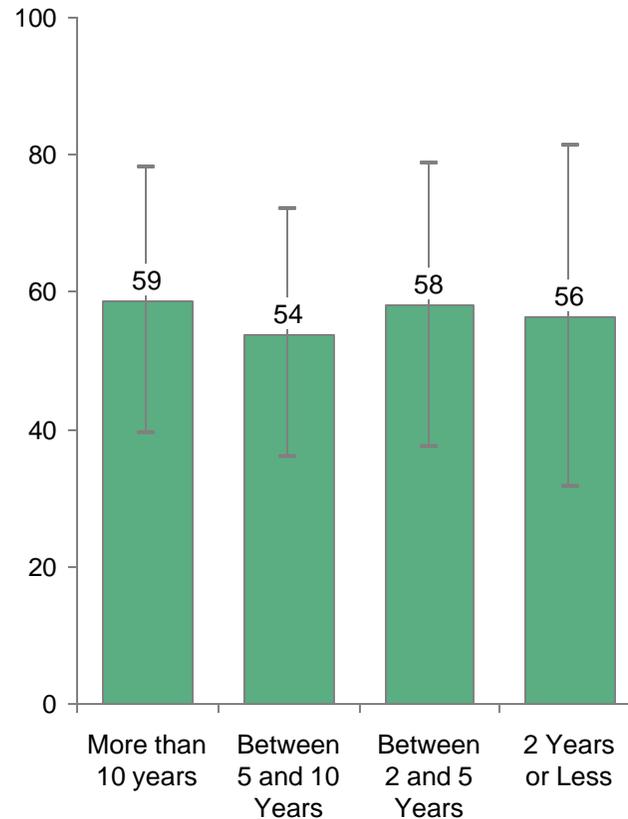| More than 10 years	Between 5 and 10 Years	Between 2 and 5 Years	2 Years or Less
62	57	59	65

THE BOSTON CONSULTING GROUP
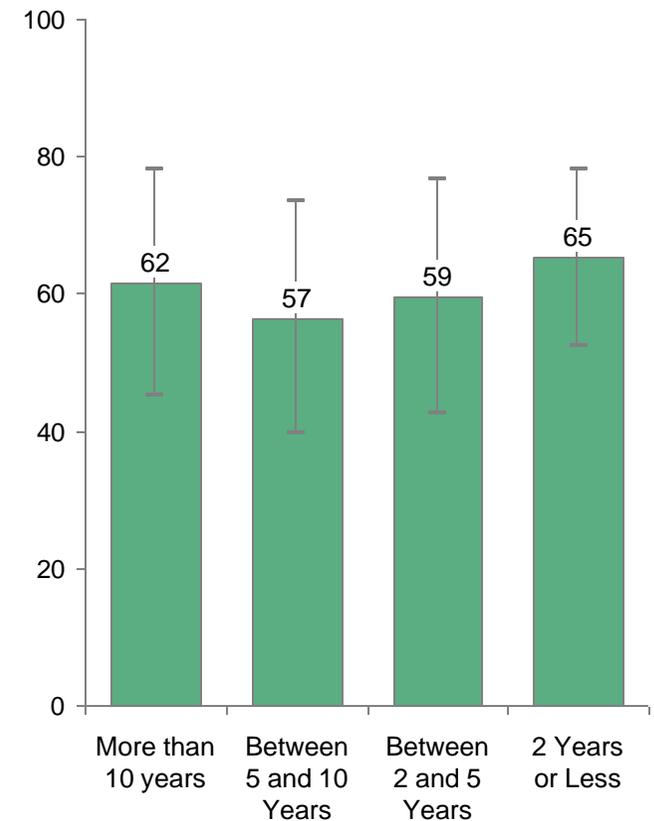
ACT results by years of experience (Marketing) – hardly any significant differences in ACT skill assessment
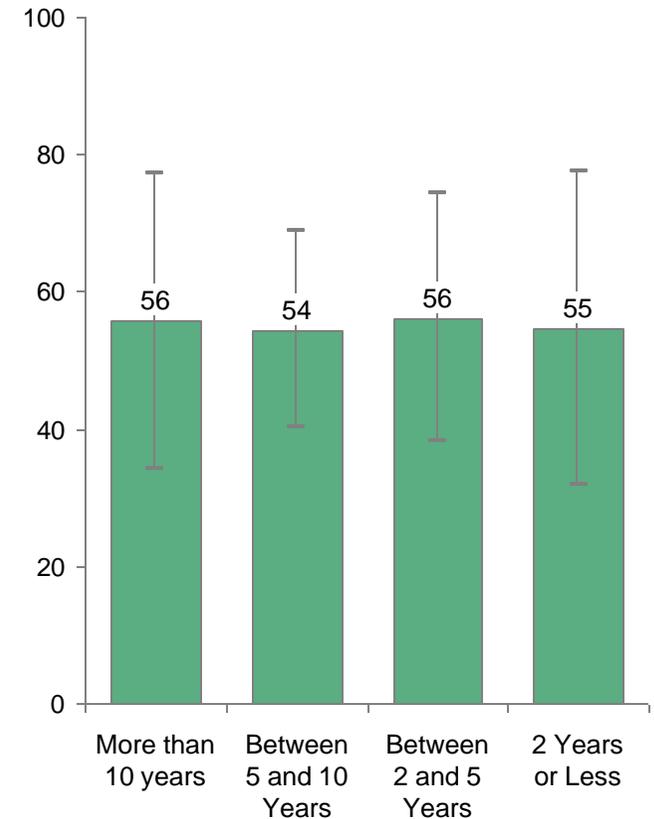
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Channels breakdown by years of experience (Marketing) - Social Media and Search with highest scores

Channels	2 Years or Less	Between 2 and 5 Years	Between 5 and 10 Years	More than 10 years
Search	59.6	63.4	63.5	**65.2**
Website	58.7	63.2	60.0	61.3
Display Media	51.2	55.2	52.0	56.1
Mobile Advertising	**42.8**	**39.9**	**39.3**	**44.7**
Mobile Web & App	61.7	51.2	44.8	48.1
Social Media	**65.0**	**65.8**	**65.3**	61.1
Video	43.0	54.3	55.9	53.5
Channels_Total	**54.6**	**56.1**	**54.4**	**55.7**

Shows the lowest assessment scores
Shows highest assessment scores

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MEASURE results by years of experience (Marketing) – MEASURE scores seem to be related to marketing experience

— + 1 STD Dev
▇ Score
— - 1 STD Dev
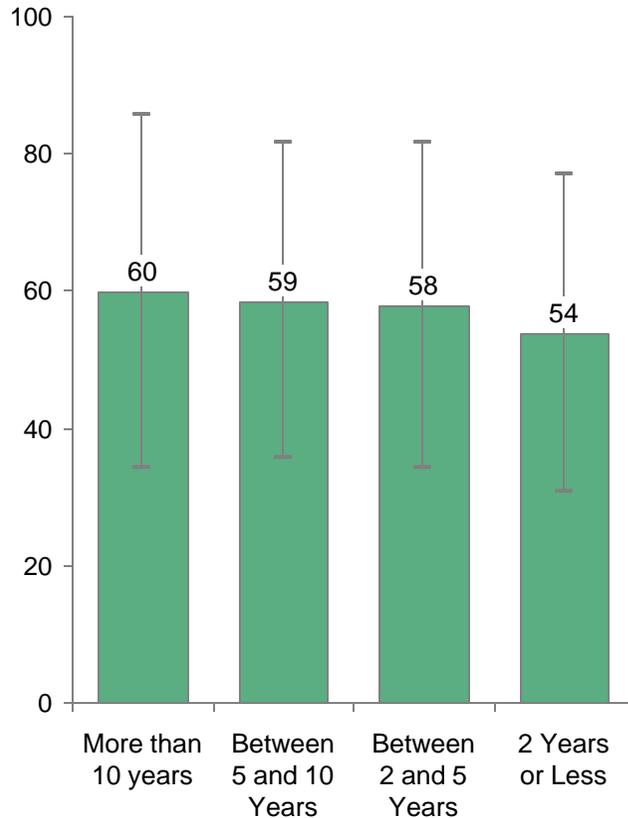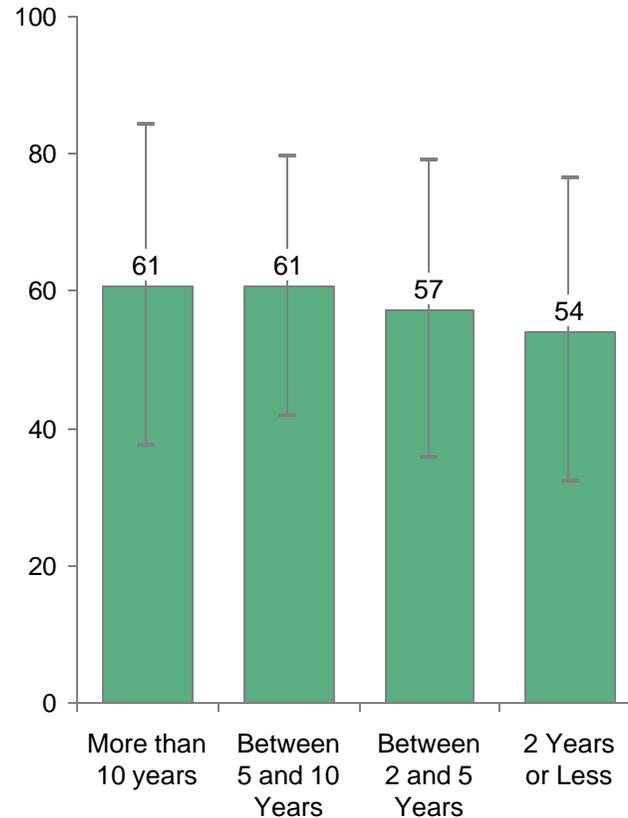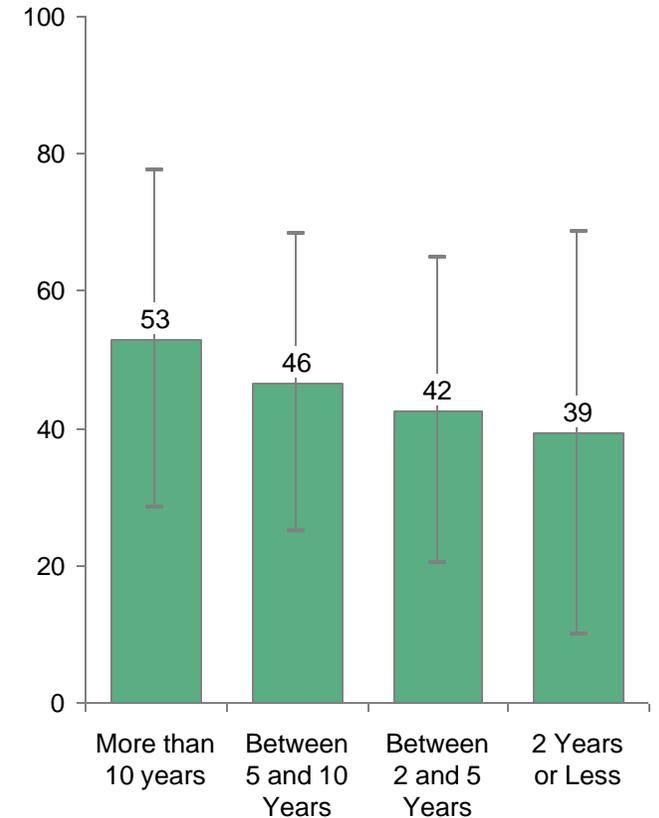
Metrics & Measurement

	Score
More than 10 years	60
Between 5 and 10 Years	59
Between 2 and 5 Years	58
2 Years or Less	54

Marketing Analytics

	Score
More than 10 years	61
Between 5 and 10 Years	61
Between 2 and 5 Years	57
2 Years or Less	54

Testing

	Score
More than 10 years	53
Between 5 and 10 Years	46
Between 2 and 5 Years	42
2 Years or Less	39

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Results by organisation level

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Results by years of experience (Digital Marketing)

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Overall results by years of experience (Digital Marketing) – Digital Marketing experience connected to higher scores
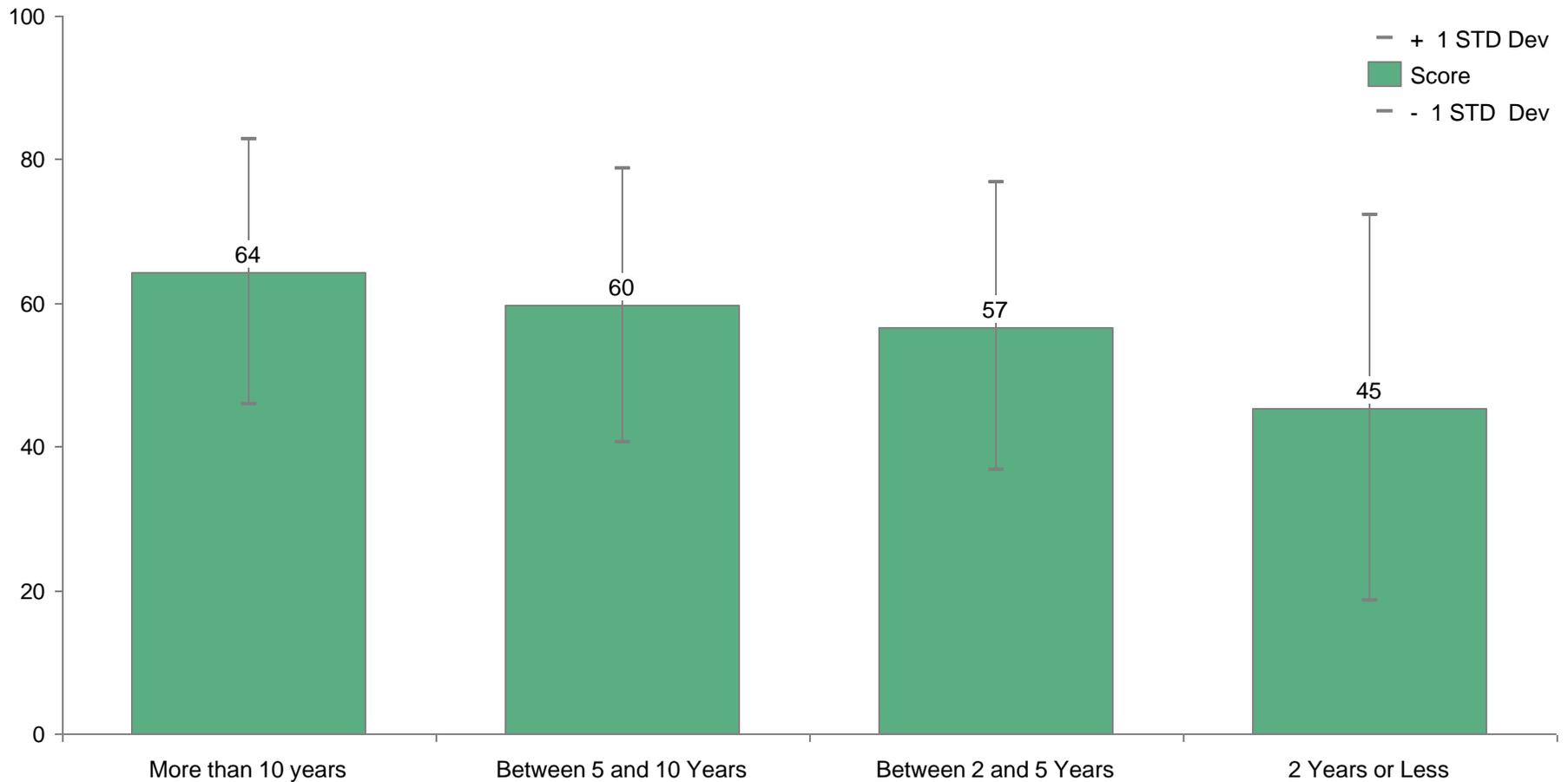
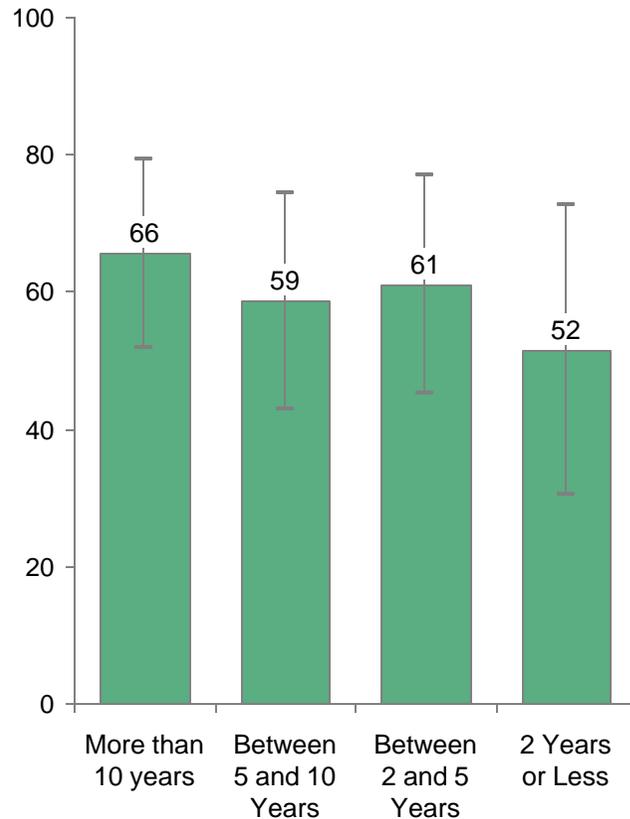Note: Scores are based on responses from 223 participants split as follows: > 10: 29, 5 to 10: 58, 2 to 5: 89, <2: 47

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PLAN results by years of experience (Digital Marketing) – Experienced participants score highest in all PLAN categories

Build Strategy & Plans

100

80

66
59
61
52

60

40

20

0

More than 10 years | Between 5 and 10 Years | Between 2 and 5 Years | 2 Years or Less

Partner Management

100

80

66
59
56
53

60

40

20

0

More than 10 years | Between 5 and 10 Years | Between 2 and 5 Years | 2 Years or Less

Enablers

100

80

65
61
60
53

60

40

20

0
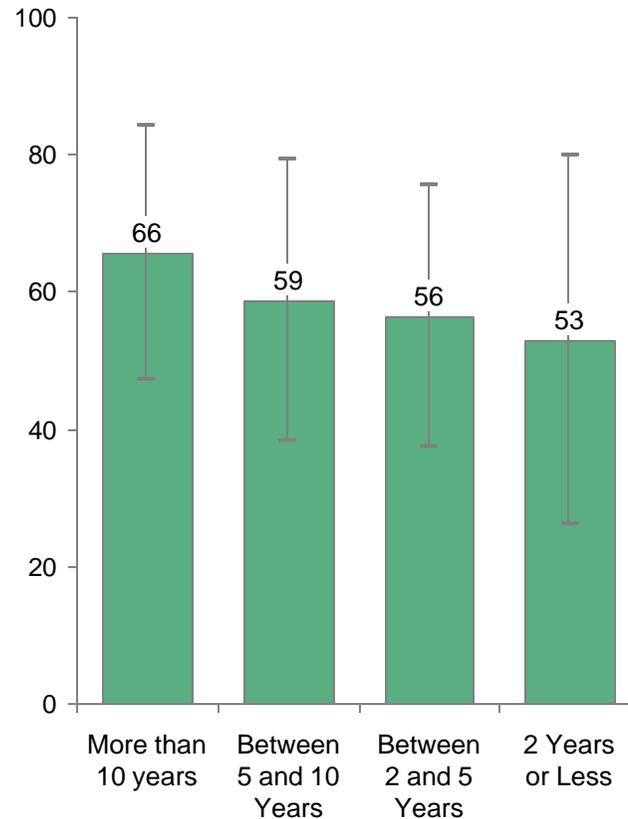
More than 10 years | Between 5 and 10 Years | Between 2 and 5 Years | 2 Years or Less
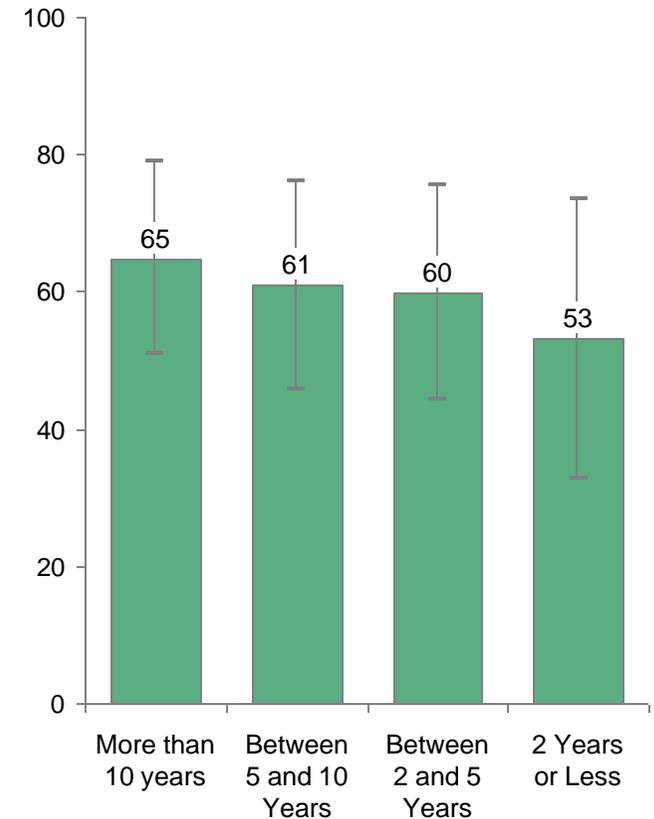
ACT results by years of experience (Digital Marketing) – ACT results show same pattern as PLAN categories

Legend:
- — + 1 STD Dev
- Score
- — - 1 STD Dev

Digital Targeting

Experience	Score
More than 10 years	63
Between 5 and 10 Years	56
Between 2 and 5 Years	52
2 Years or Less	38

Digital Content

Experience	Score
More than 10 years	65
Between 5 and 10 Years	59
Between 2 and 5 Years	57
2 Years or Less	48

Channels

Experience	Score
More than 10 years	64
Between 5 and 10 Years	59
Between 2 and 5 Years	56
2 Years or Less	43
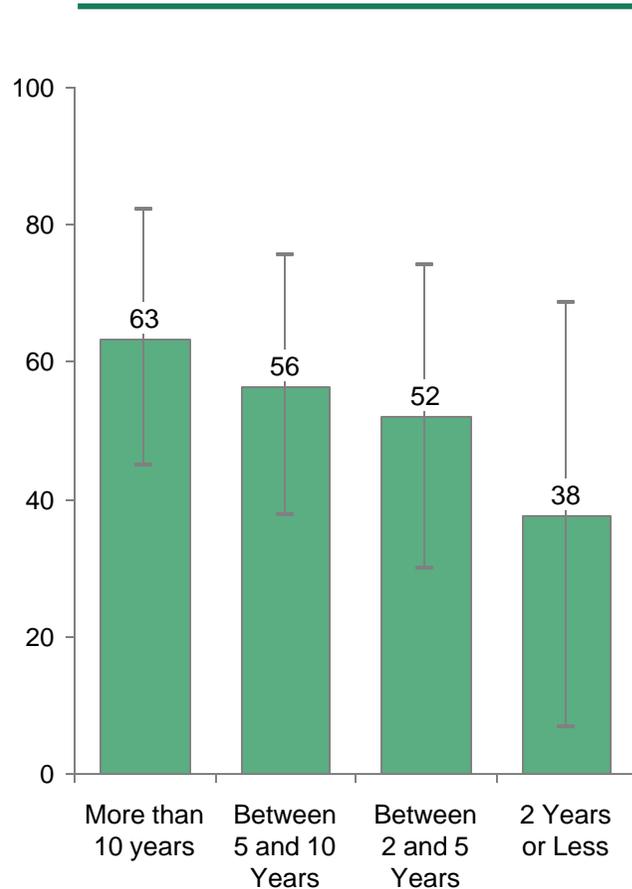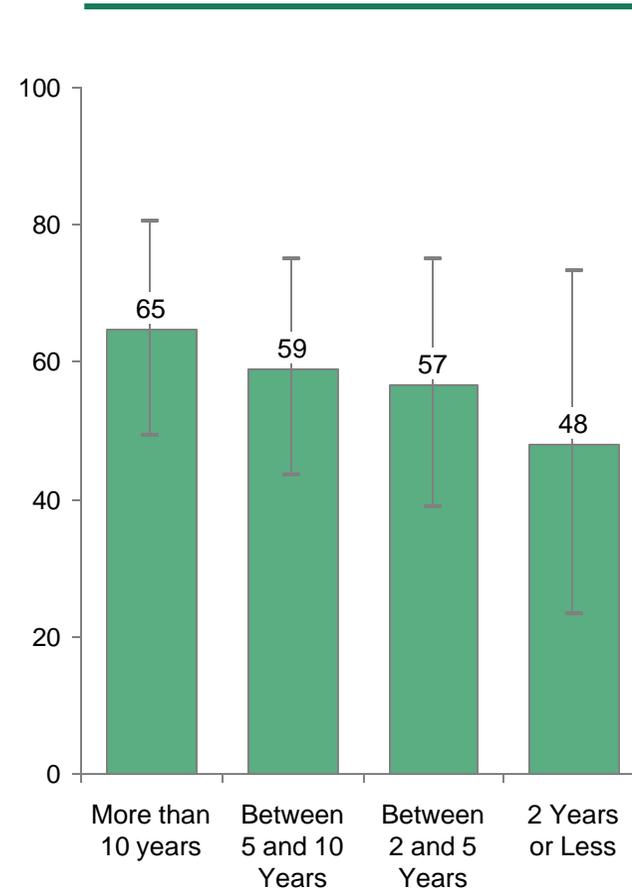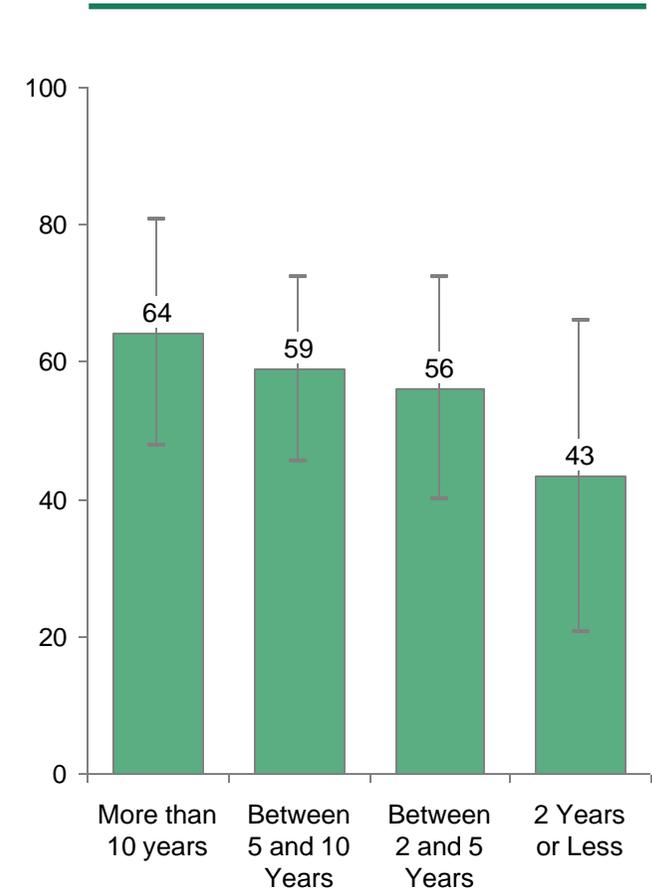
Channels breakdown by years of experience (Digital Marketing) – Mobile Advertising is the common gap

Channels	2 Years or Less	Between 2 and 5 Years	Between 5 and 10 Years	More than 10 years
Search	42.8	**66.3**	**68.8**	**79.0**
Website	**53.2**	63.0	61.1	67.7
Display Media	39.1	55.4	58.4	65.2
Mobile Advertising	**30.0**	**41.5**	**45.3**	**51.4**
Mobile Web & App	39.1	48.3	51.5	55.4
Social Media	52.6	64.2	68.7	71.2
Video	45.7	54.2	58.2	58.5
Channels_Total	**43.2**	**56.1**	**58.9**	**64.1**

Shows the lowest assessment scores
Shows highest assessment scores

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MEASURE results by years of experience (Digital Marketing) – Digital marketing experience pays off again
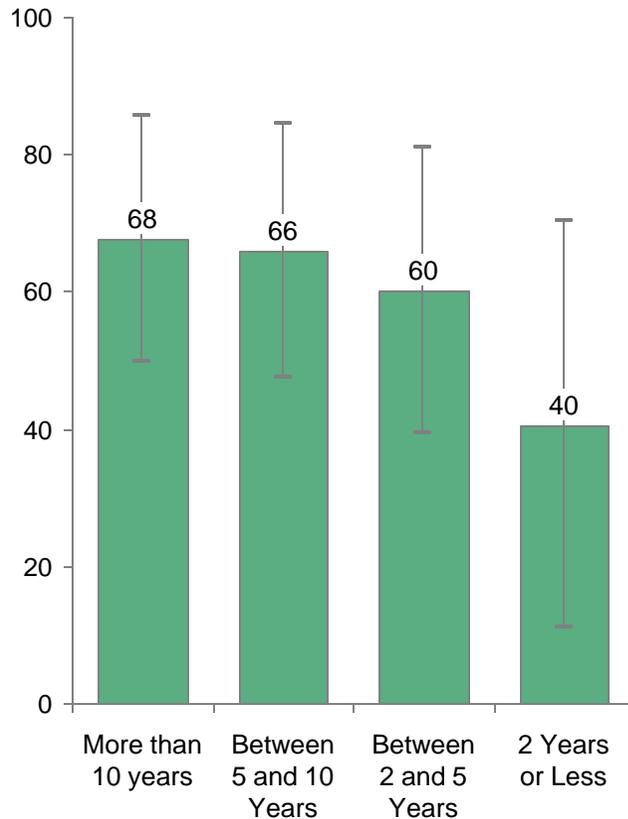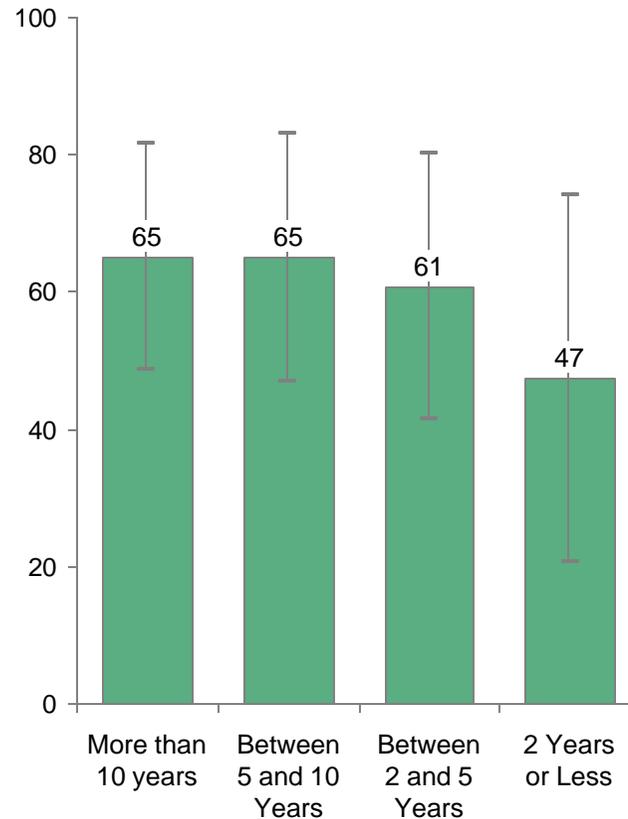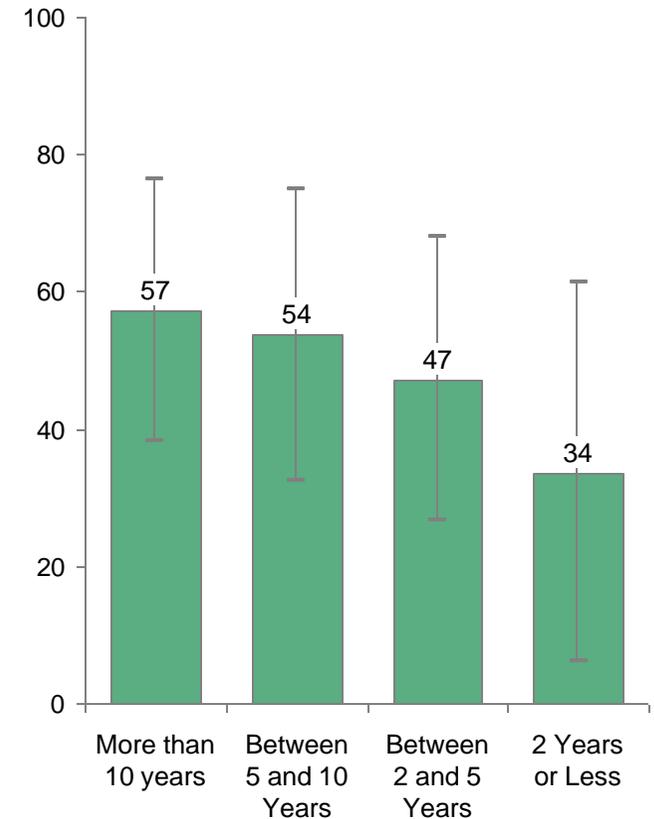
Agenda

Overall results

Participant profiles
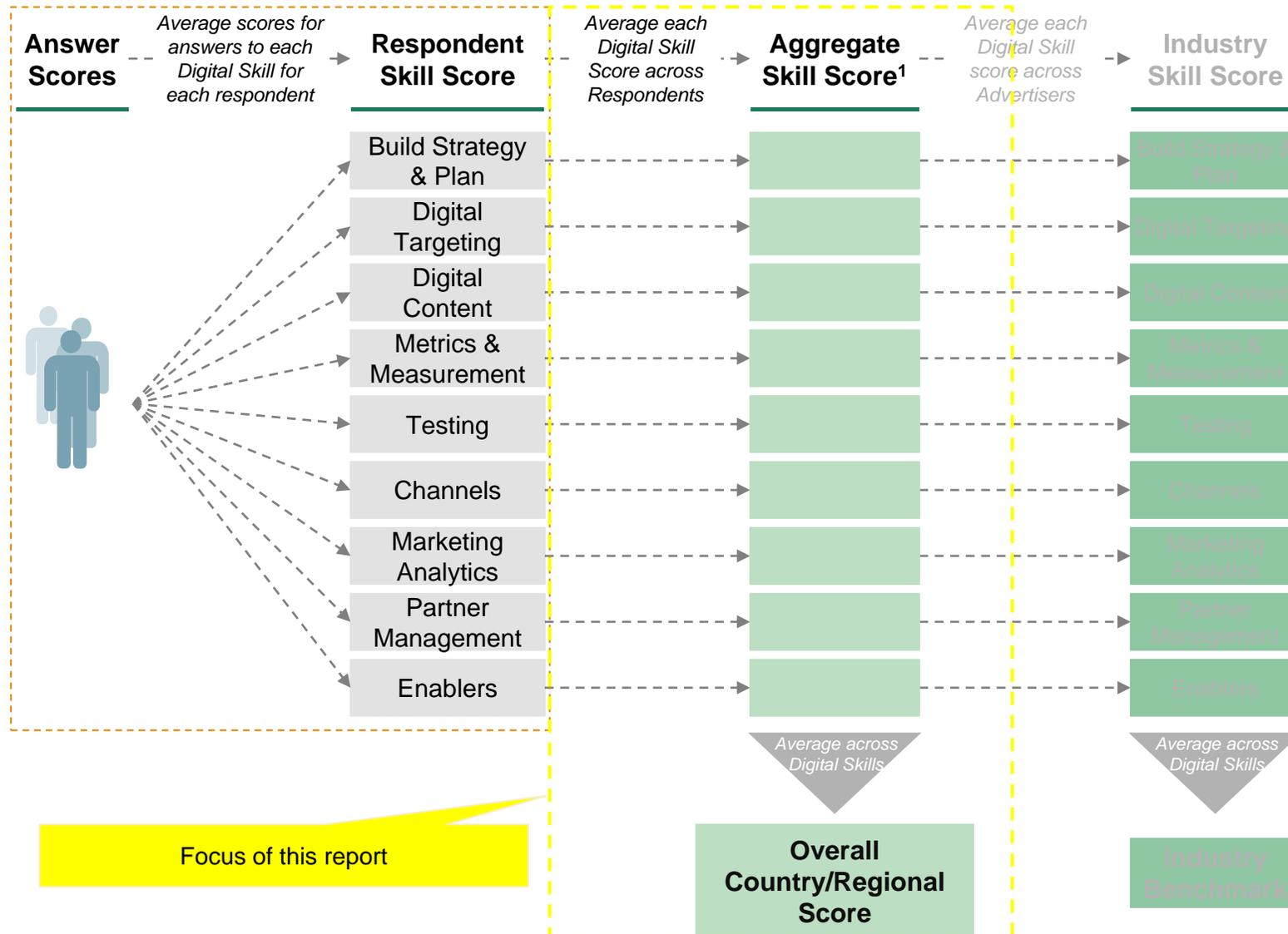
Results by scope of role

Results by organisation level

Results by role

Results by years of experience

Appendix

Scores are calculated by taking the average across the 9 Digital Skill scores

Answer Scores	*Average scores for answers to each Digital Skill for each respondent*	Respondent Skill Score	*Average each Digital Skill Score across Respondents*	Aggregate Skill Score[1]	*Average each Digital Skill score across Advertisers*	Industry Skill Score
		Build Strategy & Plan				Build Strategy & Plan
		Digital Targeting				Digital Targeting
		Digital Content				Digital Content
		Metrics & Measurement				Metrics & Measurement
		Testing				Testing
		Channels				Channels
		Marketing Analytics				Marketing Analytics
		Partner Management				Partner Management
		Enablers				Enablers

Average across Digital Skills

Average across Digital Skills

Focus of this report

Overall Country/Regional Score

Industry Benchmark

1. Scores are aggregated on the basis of different participant profiles

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Thank you