

The Digital Maturity Model 5.0

by Shar VanBoskirk
March 14, 2017

Why Read This Report

Are you ready to transform your digital business but unsure where to start? Are you curious about how you compare with other firms trying to tackle the same problem? Forrester's Digital Maturity Model 5.0 helps you plot your organizational maturity to offer strategic guidance on how to graduate to higher levels of maturity. This report updates our Digital Maturity Model 4.0 with new global data in order to see what progress firms made in 2016.

Key Takeaways

Customer Obsession Needs A Strong Digital Strategy

Because empowered customers effortlessly blend physical and digital experiences, mastering digital is critical to becoming customer obsessed.

Plot Your Maturity To Find A Starting Point

Most digital leaders today don't know how their efforts compare with those of their competitors or how far they have to go. Benchmark your cultural, organizational, technology, and insights capabilities.

Take Action Based On Your Current Maturity

Less mature firms must disrupt conventional business approaches. More mature firms must systematize their current best practices.

The Digital Maturity Model 5.0



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- [The Digital Maturity Model 4.0](#)
- [Evolve Your Organization Structure To Promote Digital Maturity](#)
- [Thriving In A Post-Digital World](#)

The Digital Maturity Model 5.0

Forrester's Digital Maturity Model 5.0

Forrester's digital maturity model originated in 2007 as specialized assessments for marketers or eBusiness professionals who wanted to diagnose their digital sophistication and establish a path toward improvement. We've consistently refined the model since then to keep it relevant for any CMO or business leader working to advance her company's digital savviness and practices.

Get The Most Out Of The Assessment

Our digital maturity model evaluates how well user companies have incorporated digital into their operating models and how effective they are at executing on digital initiatives (see Figure 1). Furthermore, vendor companies can apply it to prospects and clients to help scope and target offerings. Forrester offers other tools to help assess the progress of your business technology teams toward accommodating digital experience delivery.¹ To ensure our updated digital maturity model applies in multiple use cases, we:

- › **Included a broader sample.** We based our model this year on a survey of 1,072 marketing decision makers from firms with at least 100 employees, in eight countries, for greater granularity than previous iterations.² This allows for more precise benchmarks by industry, geography, or company size.
- › **Adjusted for progress.** We use a distribution curve, rather than a fixed score range, to categorize respondents since the definition of "mature" evolves as all companies graduate to more sophisticated digital practices. This allows the digital maturity model to account for individual business competencies and overall market growth.
- › **Created a self-assessment tool.** The interactive version of this report includes an online version of the tool and a downloadable workbook to help you assess your own company's digital maturity.³ To complete the review, score how well you agree with each statement using a four-point scale (see Figure 2). Then, use your overall scores to benchmark your firm against our sample (see Figure 3). Forrester's consulting team can provide benchmarks customized to your specific market or geographical needs.

FIGURE 1 Four Dimensions Determine Digital Maturity

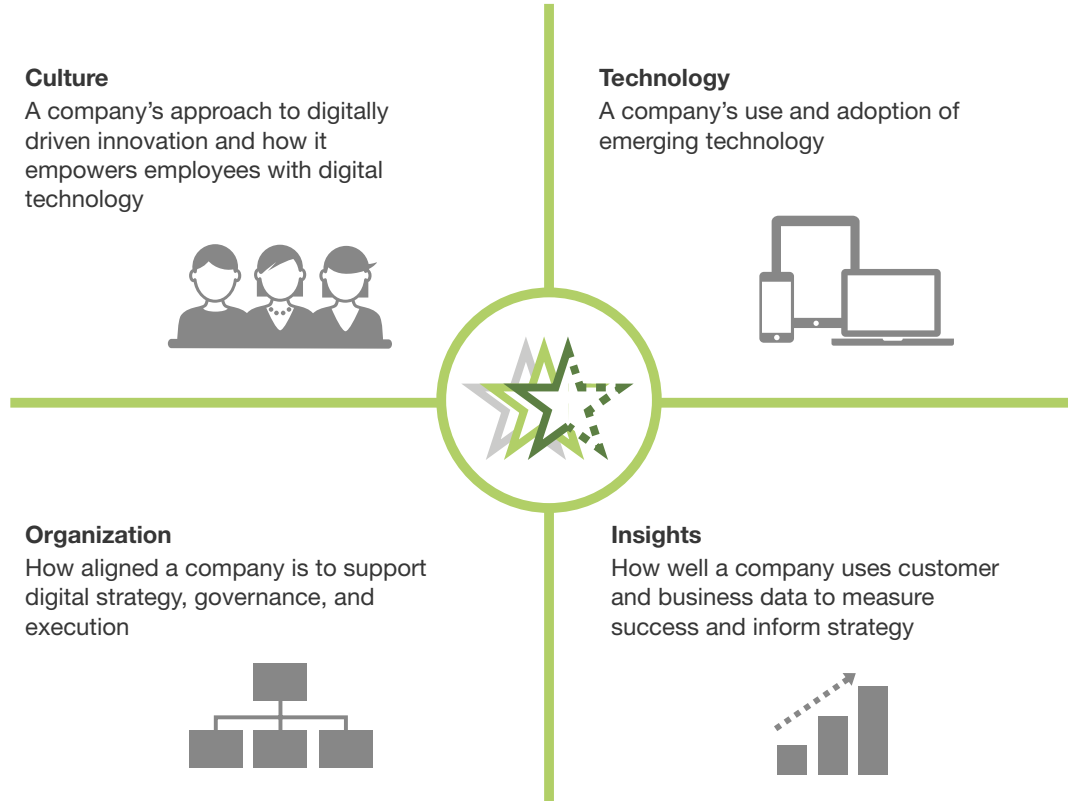


FIGURE 2 Assess Your Digital Maturity Against Global Best Practices

“How much do you agree with each of the following statements?”

0 = Completely disagree 2 = Somewhat agree
 1 = Somewhat disagree 3 = Completely agree

Culture

	We believe that our competitive strategy depends on digital.
	Our board and our C-level executives back our digital strategy.
	We have the right leaders to execute on our digital strategy day to day.
	We invest in targeted digital education and training at all levels of our organization.
	We clearly communicate our digital vision both internally and externally.
	We take measured risks in order to enable innovation.
	We prioritize overall customer experience over the performance of any individual channel.

Organization

	Our organization structure prioritizes customer journeys over functional silos.
	We dedicate appropriate resources to digital strategy, governance, and execution.
	The staff supporting our critical digital functions are best in class.
	We have digital skills embedded throughout our organization.
	Our organization model encourages cross-functional collaboration.
	We have defined and repeatable processes for managing digital programs.
	Our vendor partners deliver value that enhances our digital competencies.

FIGURE 2 Assess Your Digital Maturity Against Global Best Practices (Cont.)

“How much do you agree with each of the following statements?”

0 = Completely disagree 2 = Somewhat agree
 1 = Somewhat disagree 3 = Completely agree

Technology


	Our technology budget is fluid to allow for shifting priorities.
	Our marketing and technology resources work together to co-create our digital technology road map.
	We have a flexible, iterative, and collaborative approach to technology development.
	We leverage modern architectures (APIs, cloud, etc.) to promote speed and flexibility.
	We measure our technology teams by business outcomes, not just system uptime.
	We use customer experience assets, like personas and journey maps, to steer our technology design.
	We use digital tools to promote employee innovation, collaboration, and mobility.

Insights

	We have clear and quantifiable goals for measuring the success of our digital strategy.
	Every employee understands how her performances ties to corporate digital goals.
	We use customer-centric metrics like Net Promoter Score or lifetime value to measure success.
	We measure how channels work together to accomplish a desired outcome.
	Customer insights actively steer our digital strategy.
	Customer insights inform digital design and development.
	We feed lessons learned from digital programs back into our strategy.

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FIGURE 3 Firms Fall Into One Of Four Maturity Segments



	Maturity segment	Characteristic behavior	Strategy	Score range
High	Differentiators	Demonstrate ad hoc excellence	Systematize best practices	75 to 84
	Collaborators	Cooperative, but not insights driven	Embrace advanced analytics	57 to 74
	Adopters	Stuck in conventional practices	Accelerate current digital efforts	34 to 56
Low	Skeptics	Ignore digital	Disrupt yourself	0 to 33

The Bar For Digital Maturity Continues To Rise

Virtually everyone wants to accelerate their digital business or digital marketing strategies. Therefore, to pull ahead of market trends and competitors, you must run even faster than you do currently. To do so, you must systematically embrace digital best practices. No excuses. This also means that in our digital maturity model, the upper end of the maturity spectrum requires a higher score and has a 25% smaller range than it has in the past (see Figure 4).⁴ And this year's evaluation shows more momentum in some areas of our evaluation than in others. Specifically:

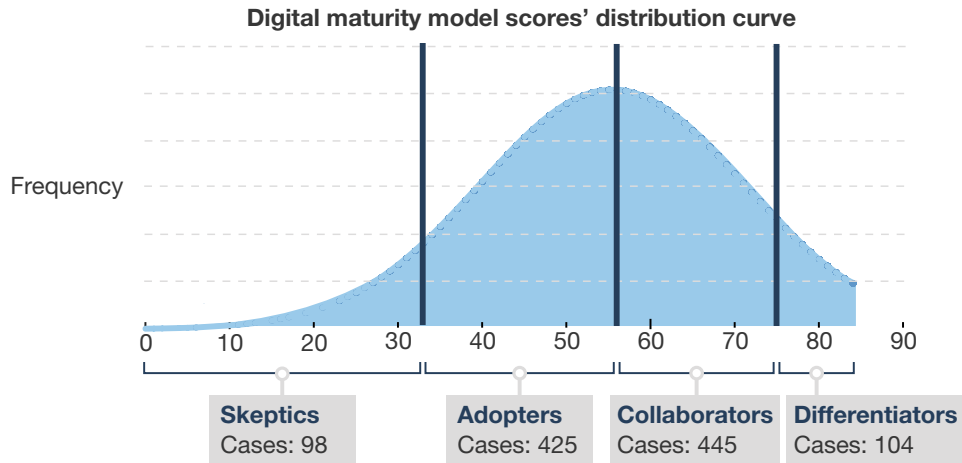
- › **Cultural support for digital grows.** Respondents at all levels score better on the cultural dimension of the evaluation than they have in the past. However, cultural progress is slower at lower levels. Mature respondents advance their digital cultures by hiring for leadership, training employees at all levels, and taking measured risks. Kevin Mitchael, the CMO of LT Apparel Group, wants candidates who are “hungry to solve problems.”⁵ Bank journey managers at Royal Bank of Scotland learn customer analytics tools so that they can optimize multichannel customer interactions without a data scientist.⁶ PureGym fast-tracks innovations with a deliberately lean team.
- › **Supporting structures now better enable digital to thrive.** Across the board, respondents rank themselves better at the organization dimension of this assessment than previously. Specifically, more firms emphasize customer journeys over silos, define repeatable processes for managing digital programs, and embed digital skills throughout the organization today than in 2015. In fact, 57% of eBusiness professionals today manage localized websites with local staff.⁷ For instance, The Gap runs key commerce technologies centrally but cedes the online sales strategy to in-market experts.⁸
- › **Technology frustrates almost everyone.** Technology is the only dimension of the digital maturity model to experience stagnation or regression from 2015 to 2016, perhaps because marketing and tech management still awkwardly collaborate on business technology (BT) management. Half of

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CMOs have marketing technology purchase authority, and 40% say technology awareness and digital understanding requires ongoing improvement.⁹ Mature digital firms like The Daily Beast co-create their technology agendas with marketing, customer experience, and tech management.¹⁰

- › **Insights become a priority at all maturity levels.** Improving the connection between customer insights and business strategy matters to all respondents. Less mature organizations assess the results of digital programs with channel metrics like acquisition or conversion. More mature firms use insights to drive corporate strategy by determining how well they meet customer needs. For example, Tesla uses telematics data to build performance models that improve the product and experiences its customers receive.¹¹

FIGURE 4 The Distribution Curve For The Digital Maturity Model 5.0



	Skeptics	Adopters	Collaborators	Differentiators
Marketing as a percent of total workforce	3%	5%	5%	7%
Marketing budget as a percent of total revenue	5%	8%	16%	11%
Percent of revenue derived through digital channels	15%	29%	44%	48%
Percent that apply analytics to measure marketing success	46%	62%	61%	93%
Percent that have a clearly defined customer experience (CX) strategy	38%	56%	84%	97%
Average percent of program budget spent on digital marketing	8%	10%	10%	9%
Marketing's average budget for technology (in \$ millions)	\$12.7	\$30.4	\$57.9	\$52.1

Note: We derive marketing's budget as a percent of revenue by calculating the average marketing budget and dividing it by a calculated average total revenue. We followed this method for the total sample and each segment.

Marketing's average budget for technology is inclusive of marketing technology, advertising technology, advertising and marketing performance measurement, sales and fulfillment technology, data and analytics, voice of the customer, customer insights, and content and personalization.

Source: Forrester Data: Global Business Technographics® Marketing Survey, 2016

To Mature, Map Yourself To One Of Four Segments

Determining if you are a Skeptic, Adopter, Collaborator, or Differentiator helps you identify a starting point for your digital strategy. And understanding the differences between less and more mature segments identifies best practices to emulate and bad habits to avoid.

Level One: Skeptics

Skeptics are typically B2B, manufacturing, pharmaceutical, and financial services firms. They don't believe digital disruption matters to them; just 37% designate digital development as a "high" business priority. They resist change, sell minimally through digital channels, and overspend on traditional advertising compared with the study average.¹² Digital champions at firms that are Skeptics must prove digital's worth by:

- › **Showcasing bright spots.** What better way to convince "won't work here" cynics than examples of where digital is already creating value at your firm? And if you really don't have an existing pool to draw from, launching a web analytics, social media, or email marketing trial will give you an inexpensive starting point.¹³ Email marketing has a very low \$6 cost per sale. Australian car manufacturer Holden boosted brand awareness and favorability with almost no incremental spend through an influencer-backed Instagram campaign.¹⁴
- › **Persuading stubborn executives.** "But the world has gone digital" argument likely won't appeal to Skeptics' execs; they've heard that and still don't believe. Hit them instead in three ways.¹⁵
 - 1) Establish credibility. Customer data is the spark of genius here: 200-year-old publisher Wiley learned through customer research that it had five key customer segments, not the three it had always used for planning.
 - 2) Apply logic. Prove that digital improves your customer experiences and subsequently revenue. Companies that boost their scores in Forrester's Customer Experience Index (CX Index™) generate more sales.¹⁶
 - 3) Invoke emotion. Gut feel trumps rationality when it comes to departing from the status quo. Jon Stegner famously piled all 424 types of work gloves his company bought to convince execs of waste.¹⁷
- › **Bringing your own disruption (BYOD).** "Start small" strategies won't transform your firm into an Adopter. Leaders at Skeptic firms need some audacity to prod them into action. BMW did this with its DriveNow business unit — a mobile-first, car-sharing service that allows customers to rent BMWs by the mile. This effort pilots a new business model for BMW and provides a lab for learning how digital is changing the automotive industry.¹⁸

Level Two: Adopters

These, the largest enterprises in our study, embrace digital slowly. Adopters spend the most on digital marketing programs, and nearly three-quarters believe their competitive strategy depends on digital. But Adopters fail a critical requirement for customer obsession: speed. Forty-five percent report that

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their firms still tackle technology projects through one-off projects with tech management.¹⁹ To mature, Adopters should approach digital not as they did past SAP implementations but at their customers' pace. The action plan:

- › **Instill some digital DNA.** Ninety-five percent of marketing decision makers at the most mature digital firms believe their employees have “strong” talent in digital marketing, compared with just 51% of Adopters.²⁰ To beef up internal digital skills, Karena Breslin, vice president of digital marketing at Constellation Brands, recruits experts at “anything with a screen.” And Matthew Pritchard, global head of digital at GlaxoSmithKline Consumer Health, asks marketing candidates to describe how they’ve convinced legacy management to launch a digital trial. But building digital talent need not be just about hiring. Asian communications giant Singtel trains all 800 of its IT professionals through ongoing workshops on how digital technologies can improve customer relationships.²¹
- › **Work outside-in.** Adopters’ digital programs originate from internal goals like “promote this product,” not user needs. Mature digital businesses like Nordstrom embrace design thinking to empathize with customers and collaboratively ideate solutions.²² This approach shifts success metrics away from perfection and toward how quickly efforts solve customer problems. Coca-Cola dedicates 10% of its marketing budget to quick experiments in emerging areas.²³ Cleveland Clinic includes patient experience in its gauge of healthcare quality.²⁴
- › **Hack yourself.** Digital disruptors like Airbnb and Spotify growth-hacked their way into established industries.²⁵ Adopters should activate their digital progress the same way. Mark King, president of Adidas North America, used a “management hackathon” to generate 21 “hacks” to quickly improve the company. Here’s how you can, too: Atomize big projects into piece parts, create testable prototypes, and build customer feedback into your design process.²⁶ Gordon Food Services’ digital business team relies on a series of linked deliverables instead of one universal road map.²⁷ And UK DIY retailer Homebase proofed a baseline mobile app in a lab environment and then polished it with customer feedback.²⁸

Level Three: Collaborators

Collaborators support aggressive investment in innovation and marketing technology through their large marketing budgets: 16% of revenue.²⁹ Marketers and digital business teams here work well with tech management colleagues but still prioritize individual channel performance over creating unified customer experiences. This, combined with insufficient measurement and analytics, means they spend less judiciously than their more mature peers. To prioritize the quality of their marketing investment over the quantity, Collaborators must:³⁰

- › **Apply advanced attribution.** Advanced attribution models show how different media affects customers at different stages of their journeys, enabling more accurate planning and limiting waste. Equifax identified \$1.25 million in unnecessary advertising in its first nine months of applying cross-channel attribution.³¹ Dell earned \$2 million in incremental revenue when it reallocated \$700,000 in misspent display media.³²

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- › **Extend the influence of the customer insights function.** Collaborators' customer analytics capabilities primarily support marketing, not broader business functions like competitive strategy, product development, or employee experience. Insights-driven firms that apply data and analytics to differentiate products and services will be worth \$1.2 trillion by 2020.³³ Stitch Fix is counting on it. Its closed-loop insights processes optimize inventory holdings — and therefore its operational cost base — based on the products customers buy.
- › **Budget holistically.** Omnichannel planning de-emphasizes channel performance to blend physical and digital experiences, creating a valuable customer/brand interaction.³⁴ EasyJet, which now credits 20% of bookings to its mobile app, just combined its marketing and digital teams to make this easier.³⁵ Agency Hill Holliday finds that simply earmarking budget for “video” opens up buyers to include online video with their TV ads. And MasterCard pools its regional budgets with local merchant partners in order to afford deeper customer engagement — like following up a TV spot with search or social ads.³⁶

Level Four: Differentiators

Consistent with past findings, Differentiators skew heavily toward online-focused retailers; 48% of Differentiators' revenues come from digital channels.³⁷ These mature digital businesses integrate their marketing, customer experience, and insights teams to create customer-centric experiences. Ninety-three percent of them inform strategy with customer insights. But Differentiators don't yet demonstrate digital best practices consistently, every time, in every process. These digital pros can systematize their innovative efforts by:

- › **Adopting a post-digital approach.** In a post-digital reality, empowered customers don't distinguish between digital and physical experiences. This means that Differentiators must focus on solving customer problems, not marking their territory. Fergal Coburn, the head of digital products and payments at Allied Irish Banks, finds “jostling for ownership of the agenda” can paralyze progress toward customer obsession. When the bank applied Agile principles and a multiskill team, it was able to launch digital mortgages, personal loans, and new account functionality in six weeks.
- › **Selling customer outcomes rather than products.** Usage-based business models like those of Airbnb, Clutch, and Eleven James will dominate traditional product models in 2017.³⁸ To get comfortable with these product-as-a-service strategies, Differentiators must consider themselves a startup *and* an enterprise. This means rethinking established roles and processes but at scale. For example, GE now manufactures sensor-based equipment so that it can improve or customize equipment to user needs through software. This makes tech management — and digital innovation — a revenue driver, not a cost center.
- › **Co-creating with customers.** When Differentiators include customers in their strategy and product development process, they earn loyalty.³⁹ Design thinking also helps them comprehend and even anticipate customers' moments of need to speed up the feedback loop. Taco Bell's efforts to tap customers for marketing content, flavor preferences, and product names are part of an effort to

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think like a tech company, not a fast food chain. CEO Brian Niccol expects co-creation will lead to brand affinity akin to that of Nike or Apple, enabling “mood ordering” and other such one-to-moment experiences.⁴⁰

Recommendations

Use The Digital Maturity Model To Plan Your Transformation

CMOs: When it comes to digital transformation, if you are not moving forward, you may as well be moving backward. To use Forrester’s digital maturity model to improve your current standing and stay ahead of competitors in 2017:

- › **Identify your current digital maturity.** Identifying specific strengths to enhance or weaknesses to tune up creates the foundation for your digital road map. It also provides a comparative benchmark. Nestlé has used our maturity model for several years to steer the increasing maturity of its brands like Purina in North America. Fielding the survey to multiple stakeholders helps Nestlé steer investment. Do the same by downloading the interactive workbook that accompanies this report or talking to our consulting team about how it can help.
- › **Assign accountability for critical developments.** Many businesses still struggle to take action — even after they know what to improve — because they haven’t identified clear owners of trouble spots. Manage this by assigning key challenges to relevant business owners based on how disruptive the digital effort is to them. For instance, boosting digital training and communications might go to HR, while developing customer-centric metrics should be a customer insights responsibility. We worked with one Canadian retailer to prioritize potential email marketing priorities through a RACI model that diagrammed workload and process steps by key stakeholders inside and outside marketing.
- › **Use the value of improving your digital maturity to justify continual effort.** Enhancing digital maturity should be an ongoing effort. Differentiators articulate the return on efforts based on financial and nonfinancial measurement frameworks. For example, marketers like Atkins and Choice Hotels blend statistical methods to determine the business value of individual digital media investments through an approach we call unified marketing impact analysis. Virgin Media prioritizes action by analyzing which digital experiences most increase or decrease Net Promoter Score.⁴¹

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Supplemental Material

Online Resource

To access the corresponding assessment tool, refer to “The Digital Maturity Model 5.0 Interactive Tool” which is linked in this endnote.⁴²

Survey Methodology

The Forrester Data: Global Business Technographics® Marketing Survey, 2016, was fielded in May and June 2016. This online survey included 1,072 respondents in Brazil, Canada, China, France, Germany, India, the UK, and the US from companies with 500 or more employees (the US, Canada, Germany, France, the UK, India, and China) or 100 or more employees (Brazil).

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Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Research Now fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates.

Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester's Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

- ¹ Forrester's Digital Business Readiness Assessment helps CIOs and their lieutenants determine how well equipped their technology architecture and operations are to deliver the digital customer experiences the business needs. See the Forrester report "[Begin Your Journey To Digital Mastery.](#)"
- ² Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ³ See the Forrester report "[The Digital Maturity Model 5.0 Interactive Tool.](#)"
- ⁴ In 2015, a score of 72 placed a company in our most mature segment. For the Digital Maturity Model 5.0, the most mature segment begins at 75. This three-point difference accounts for a 25% reduction in segment range. Similarly, the second-highest segment saw its minimum score increase by four points and its range decrease by 6%.
- ⁵ Removing obstacles to customer obsession is a key characteristic of customer-obsessed leaders. See the Forrester report "[Leadership In The Age Of The Customer.](#)"
- ⁶ Instead of having an analytics team do all the heavy lifting needed to optimize marketing programs, Royal Bank of Scotland (RBS) trained 50 of the bank's journey managers on the analytics skills and tools they would need to run optimization efforts themselves. Optimization efforts accelerated from two to 70 tests per quarter in less than a year, and conversion uplift tripled. See the Forrester report "[Transform Customer Experience With Continuous Optimization.](#)"
- ⁷ Source: Forrester's Q4 2015 Global eBusiness And Channel Strategy Professional Online Survey.
- ⁸ See the Forrester report "[Globalize Your eBusiness Organization Structure.](#)"
- ⁹ Source: Forrester's Q4 2015 Forrester/Heidrick & Struggles Global Evolved CMO/CCO Online Survey.
Almost 40% of survey respondents identified data insight and analytics skills, technology awareness, and digital understanding as key areas requiring ongoing improvement. Almost half the same respondent pool owned full responsibility for making marketing technology decisions. See the Forrester report "[The Evolved CMO In 2016.](#)"
- ¹⁰ The Daily Beast includes digital marketing, content creation, customer experience, and digital technology on a single digital team. Its design lead and chief technology officer are both executive positions that report to the chief digital officer. See the Forrester report "[The Digital Maturity Model 4.0.](#)"
- ¹¹ See the Forrester report "[The Insights-Driven Business.](#)"
- ¹² Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ¹³ Overhauling all of your current shortcomings in one go isn't realistic at a company lukewarm to digital. But trialing and proving the value of one small step at a time can gradually nudge firms and executives toward new habits. See the Forrester report "[The Digital Maturity Model 4.0.](#)"
- ¹⁴ Source: "Holden: Creativity in Motion," Instagram Business (http://instagram-static.s3.amazonaws.com/case_studies/IG_Holden.pdf).

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- ¹⁵ Time-tested practices of persuasion work when making the case for more investment in customer experience, and they can work to generate related buy-in to digital. See the Forrester report [“Seven Steps To Create And Sustain A Customer-Centric Culture.”](#)
- ¹⁶ Better customer experience can increase customer loyalty and mean millions in revenue. See the Forrester report [“Drive Revenue With Great Customer Experience, 2017.”](#)
- ¹⁷ Source: Chip Heath and Dan Heath, *Switch: How to Change Things When Change Is Hard*, Crown Business, 2010.
- ¹⁸ More and more usage, rather than ownership, models will emerge in 2017. See the Forrester report [“Predictions 2017: The Post-Digital CMO Appears.”](#)
- BMW’s DriveNow effort takes advantage of this. Source: Nico DeMattia, “BMW and Daimler considering merging DriveNow and Car2Go,” BMW Blog, December 15, 2016 (<http://www.bmwblog.com/2016/12/15/bmw-daimler-considering-merging-drivenow-car2go/>).
- ¹⁹ Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ²⁰ Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ²¹ See the Forrester report [“Case Study: Singtel Group’s CIO Initiates A Customer-Obsessed Operating Model.”](#)
- ²² The principles of design thinking help firms foster empathy with their customers and comprehend their key moments of need. See the Forrester report [“Master Design Thinking To Accelerate Your Digital Transformation.”](#)
- ²³ At Coca-Cola, 20% of its marketing investment goes to “new” — emerging trends that are starting to gain traction; 10% goes to “next” — ideas that are completely untested. It then starts small and scales fast. Source: Josh Leibowitz, “Invest to innovate: Coke’s 70/20/10 rule,” LinkedIn, February 13, 2013 (<https://www.linkedin.com/pulse/20130213130531-12921524-invest-to-innovate-coke-s-70-20-10-rule>).
- ²⁴ Aligning around customer needs is critical to creating a cohesive corporate culture. See the Forrester report [“Seven Steps To Create And Sustain A Customer-Centric Culture.”](#)
- ²⁵ Growth hacking is the process of stretching conventional boundaries to drive growth. It is the practice used to describe how small innovative digital firms have completely reinvented the well-established business models of well-established industries. Source: Neil Patel and Bronson Taylor, “The Definitive Guide To Growth Hacking,” Quick Sprout (<https://www.quicksprout.com/the-definitive-guide-to-growth-hacking/>).
- ²⁶ A few small tactical changes to critical processes, like project approval or solution design, can go a long way in demonstrating the potential of a wider digital transformation. See the Forrester report [“Brief: Three Process Hacks To Speed Digital Delivery.”](#)
- ²⁷ By reducing the scope of its projects to create a series of linked deliverables, the eBusiness team at Gordon Food Services is changing the way it develops road maps and plans.
- ²⁸ Homebase and IBM jointly pioneered a new mobile app: Iterative development and an automated release process allowed the team to deliver changes in days. See the Forrester report [“Brief: Three Process Hacks To Speed Digital Delivery.”](#)
- ²⁹ We derive marketing’s budget as a percent of revenue by calculating average marketing budget and dividing it by calculated average total revenue. We followed this method for the sample total and each segment. Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ³⁰ By 2021, CMOs will spend nearly \$119 billion on search marketing, display advertising, online video, and email marketing. This growth reflects a new emphasis on quality over quantity, a dynamic that will reintroduce human intervention into programmatic ad buying, turn marketers into growth hackers, and put long-tail publishers out of business. See the Forrester report [“US Digital Marketing Forecast: 2016 To 2021.”](#)

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- ³¹ Source: “A tale of marketing attribution success at Equifax,” iMedia, September 25, 2015 (<http://www.imediaconnection.com/article/180146/a-tale-of-marketing-attribution-success-at-equifax>).
- ³² Source: “Marketing attribution success: An insider’s account,” iMedia, September 19, 2014 (<http://www.imediaconnection.com/article/133270/marketing-attribution-success-an-insiders-account>).
- ³³ See the Forrester report “[The Insights-Driven Business](#).”
- ³⁴ Media buying that relies exclusively on automation will fail. Omnichannel digital media buying requires marketers to embrace new processes, partnerships, and staffing. See the Forrester report “[Build An Empowered Digital Media Buying Team](#).”
- ³⁵ Source: Mindi Chahal, “EasyJet creates new roles to focus on customer experience and digital,” Marketing Week, January 17, 2017 (<https://www.marketingweek.com/2017/01/17/easyjet-creates-new-roles-focus-customer-experience-digital/>).
- ³⁶ See the Forrester report “[Case Study: Drive Real-Time Marketing As Part Of Your Digital Transformation Journey](#).”
- ³⁷ Source: Forrester Data: Global Business Technographics Marketing Survey, 2016.
- ³⁸ See the Forrester report “[Predictions 2017: The Post-Digital CMO Appears](#).”
- ³⁹ Taco Bell applies a “create, co-create, curate” strategy to its content marketing. Co-create includes content created with consumers, while curate shows off user-generated content. See the Forrester report “[Thriving In A Post-Digital World](#).”
- ⁴⁰ Source: Jonathan Ringen, “Epic Cheese Pull: How Taco Bell Nailed Its Innovative New Quesalupa,” Fastco Create, February 7, 2016 (<https://www.fastcocreate.com/3056059/most-innovative-companies/taco-bell-for-combining-corn-beans-meat-and-cheese-into-genius>).
- ⁴¹ Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Satmetrix Systems, and Fred Reichheld.
- ⁴² See the Forrester report “[The Digital Maturity Model 5.0 Interactive Tool](#).”

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