Digital Marketing Survey 2022 – *The Key Findings*

Ann Stanley

March 2022

About the Anicca Marketing Survey

Key findings 2022

90 responses from different types of organisations:

- Mix of sizes (number of employees) and income
- Organisations were from many sectors and had a range of products, services, and routes to market
- Varying marketing capabilities – in-house teams, individuals and outsourced resources
- 16% did not have a website (or say that had)!
- Many had a sales team or used a mix of online and offline routes to market

Use, knowledge and performance of marketing channels

- The channels with the highest use, performance and knowledge were the traditional Owned and Earned channels, like email, organic social, CRM etc.
- Many were still using traditional/offline marketing
- Paid channels (esp. TV/radio and Marketplaces) were not being used or performed poorly
- Marketing Automation and Conversion optimisation were also under-used or under-performed
- Size and income of an organisation was not a strong indication of current knowledge, skills or channels used

Objectives and plans

- Many organisation intended to increase overall marketing activities, planning, brand awareness, lead generation or sales
- A budget of 1-5% was most common across all sizes of organisations, most were leaving their budgets unchanged or increasing them

What was different from 2021

Different types of organisations:

- The survey was completed by more micro (<10) organisations this year
- There were less businesses selling serivces, and there were a bigger mix of combinations
- There was less markeitng companies and manufacturers this year, with more of a mix

Use, knowledge and performance of marketing channels

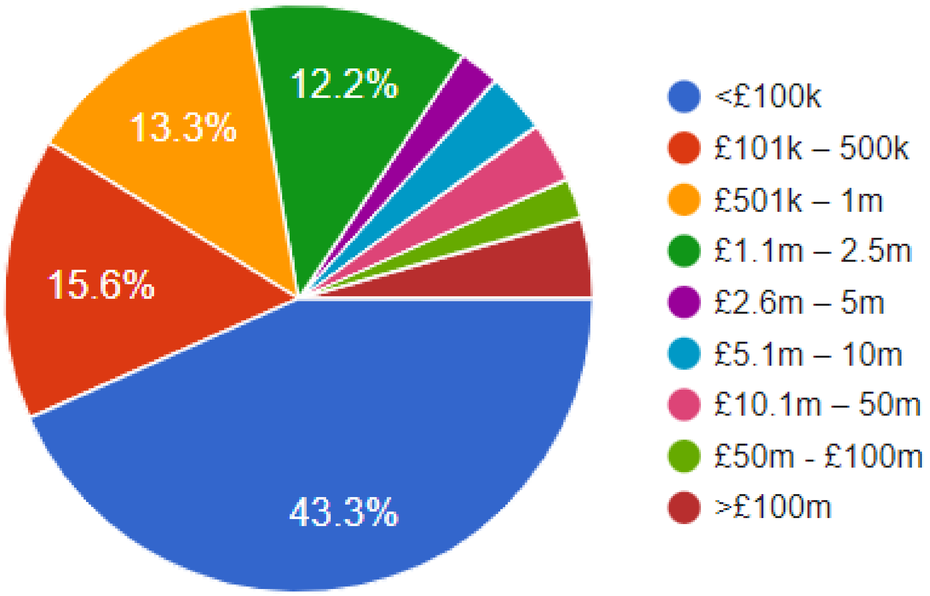
- There was more mentions of TikTok, AI and events (both virtual and live)
- There was a lot of techniques that were not applicable or had not been tried, like Marketplaces and digital TV/radio
- There is a still a general lack of capability or use of paid and more technical techniques like paid search, conversion rate optimisation and marketing autotmation

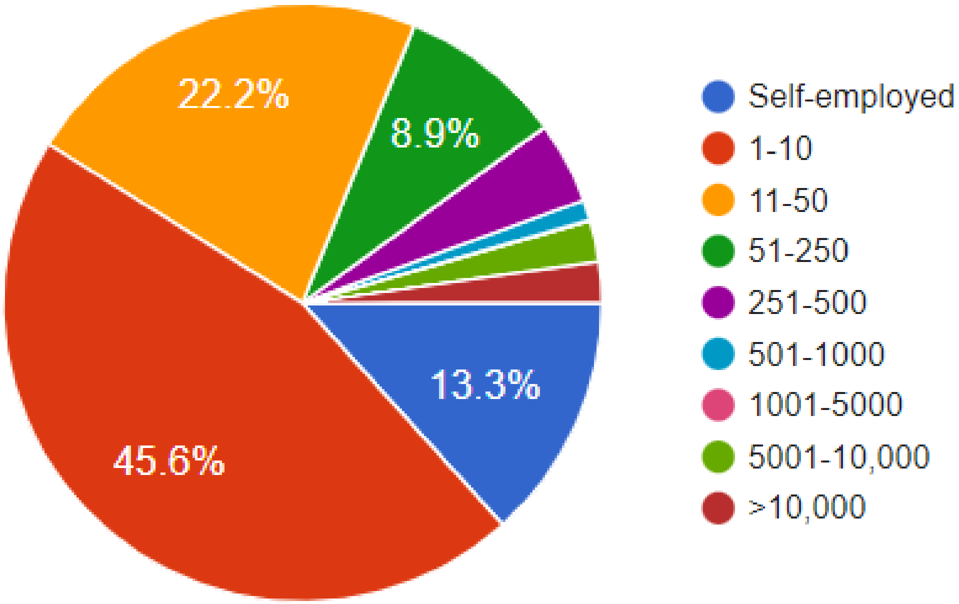
Objectives and plans

- Budgets were generally bigger proportion than last year
- More was planned to be spent on traditional media, possibly events

Key findings (about the respondents)

Turnover & number of staff (2022)





Turnover & number of staff (2022)

	<£100k	£101k – 500k	£501k – 1m	£1.1m – 2.5m	£2.6m – 5m	£5.1m – 10m	£10.1m – 50m	£51m-£100m	>£100m	
Self-employed	12									**12**
1-10	23	12	2	4						**41**
11-50	3	1	8	5	1	1		1		**20**
51-250			2	2	1	1	1			**7**
251-500	1						2		1	**4**
501-1000						1			1	**2**
1001-5000										**0**
5001-10,000								1	1	**2**
>10,000									2	**2**
	39	**13**	**12**	**11**	**2**	**3**	**3**	**2**	**5**	**90**

- 35 out of 53 (or 66%) of organisations employing <10 staff, had a turnover of <£100k
- 32 out of 37 (88%) of organisations that employed >10 staff and had a turnover >£1m
- 14.4% of organisations had a turnover of more than £5m

Turnover & number of staff (21 vs 22)

2021	<£100k	£101k – £500k	£501k – £1m	£1.1m – £2.5m	£2.6m – £5m	£5.1m – £10m	£10.1m – £100m	>£100m		
Self-employed	8								8	43.3%
1-10	17	8	2	2	1	1			31	
11-50	2	6	6	9	2	1			26	56.7%
51-200			1	3	1	4	2		11	
201-500					1		3	1	5	
501-1000			1				2		3	
1001-5000						1		3	4	
5001-10,000								1	1	
>10,000							1		1	
	27	14	10	14	5	7	8	5	90	
	56.7%			54.4%						

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11-50	2	6	6	9	2	1			26	
51-200			1	3	1	4	2		11	
201-500					1		3	1	5	56.7%
501-1000			1				2		3	
1001-5000						1		3	4	
5001-10,000								1	1	
>10,000							1		1	
	27	14	10	14	5	7	8	5	90	
		56.7%				54.4%				

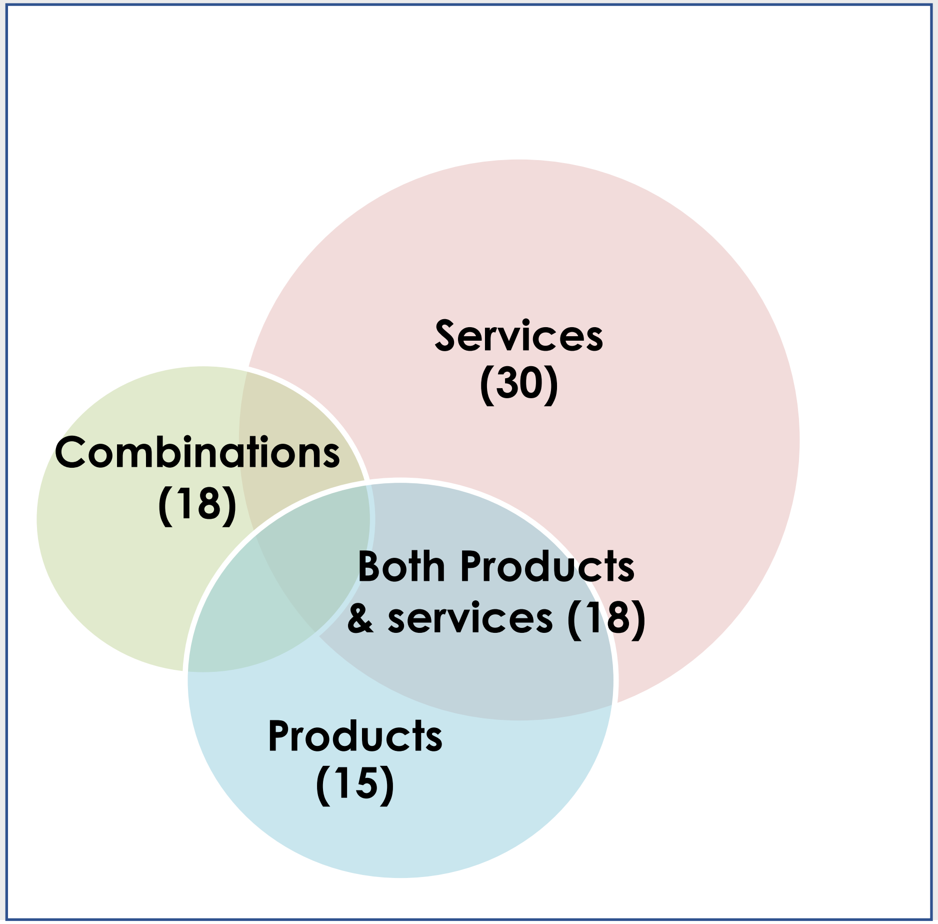
2022	<£100k	£101k – 500k	£501k – 1m	£1.1m – 2.5m	£2.6m – 5m	£5.1m – 10m	£10.1m – 50m	£51m- £100m	>£100m		
Self-employed	12									12	
1-10	23	12	2	4						41	58.9%
11-50	3	1	8	5	1	1		1		20	
51-250			2	2	1	1	1			7	
251-500	1						2		1	4	
501-1000						1			1	2	41.1%
1001-5000										0	
5001-10,000								1	1	2	
>10,000									2	2	
	39	13	12	11	2	3	3	2	5	90	
		71.1%				28.9%					

Locations (2022)

- 82 of the respondents' locations were mapped in this image
- 2 respondents were from outside the UK
- The top location were:
  - Leicester 33.3%
  - Nottingham 14.9%
  - Derbyshire 6.9%
  - Lincolnshire 4.6%

What do they sell (2022)?

- 64 (71%) sold services and 40 (44%) sold products
  - 33.3% of organisations just sold services
  - 16.7% of organisations just sold products
  - 20% sold both products and services
  - 20% had other combinations (charities, SASS etc)



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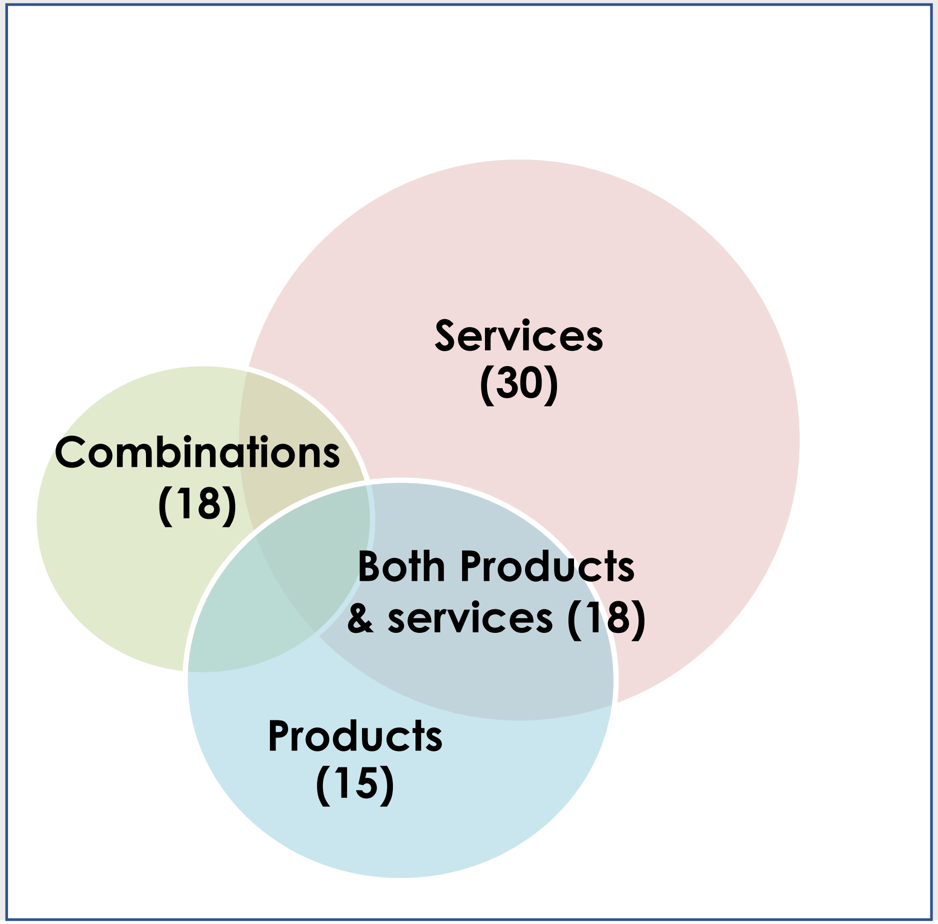
What they sell	Number
Services	30 (33.3%)
Products	15 (16.7%)
Products & services	18 (20%)
SASS	6 (6.7%)
Charity work or community projects	3 (3.3%)
Other combinations	18 (20%)
	90



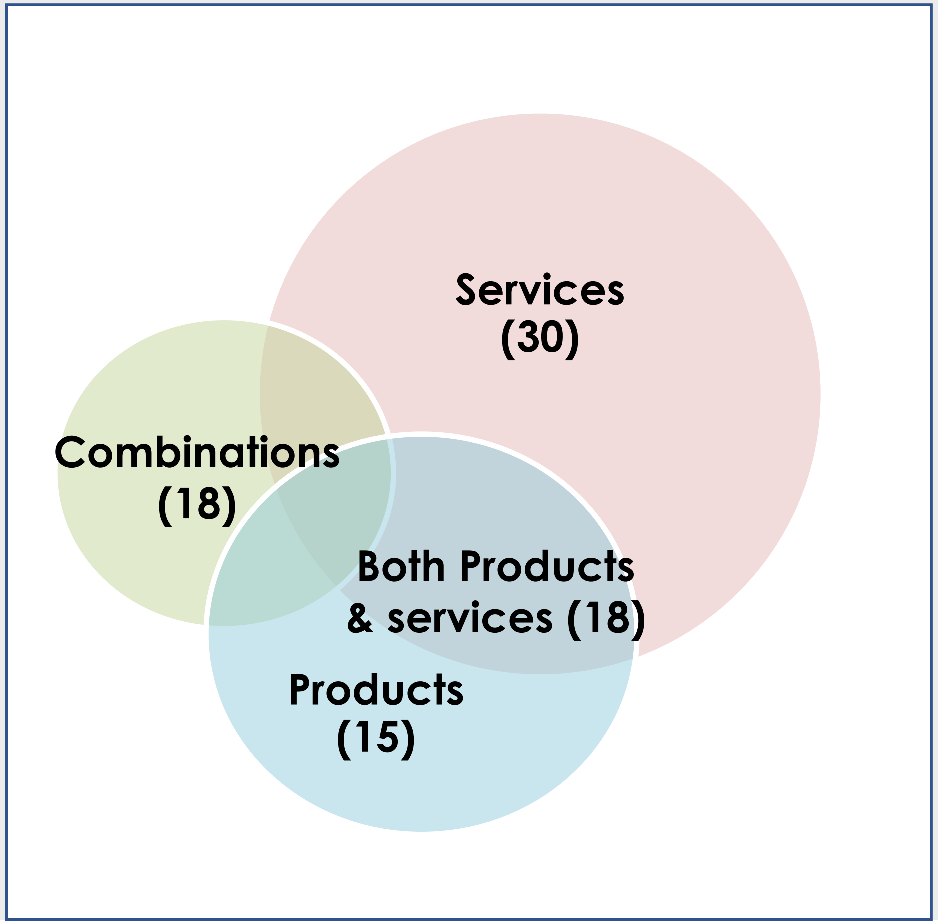
Sectors (2022)

Sector	%
Marketing or advertising e.g. agency or freelance	17.8%
Technology / Software	15.6%
Membership, professional services & support organisation for businesses	10.0%
Property & Construction	6.7%
Charity	5.6%
Tourism, leisure & venues	5.6%
Education and Training Providers & Universities	4.4%
Manufacturing & Engineering	4.4%
Shoes, clothing, apparel & accessories	4.4%
Finance & insurance	3.3%
Health, medical & scientific products and services	3.3%
Events management	2.2%
Home and Garden	2.2%
Jewellery & Gifts	2.2%
Non-profit or Government	2.2%
Agriculture, Farming, Veterinary & Pets	1.1%
Automotive	1.1%
Food & drink	1.1%
Office supplies & equipment	1.1%
Packaging	1.1%
Recruitment, HR & staff support	1.1%
Tools & equipment sales	1.1%

Services split by sector (2022)

- Services provided by these organisations:

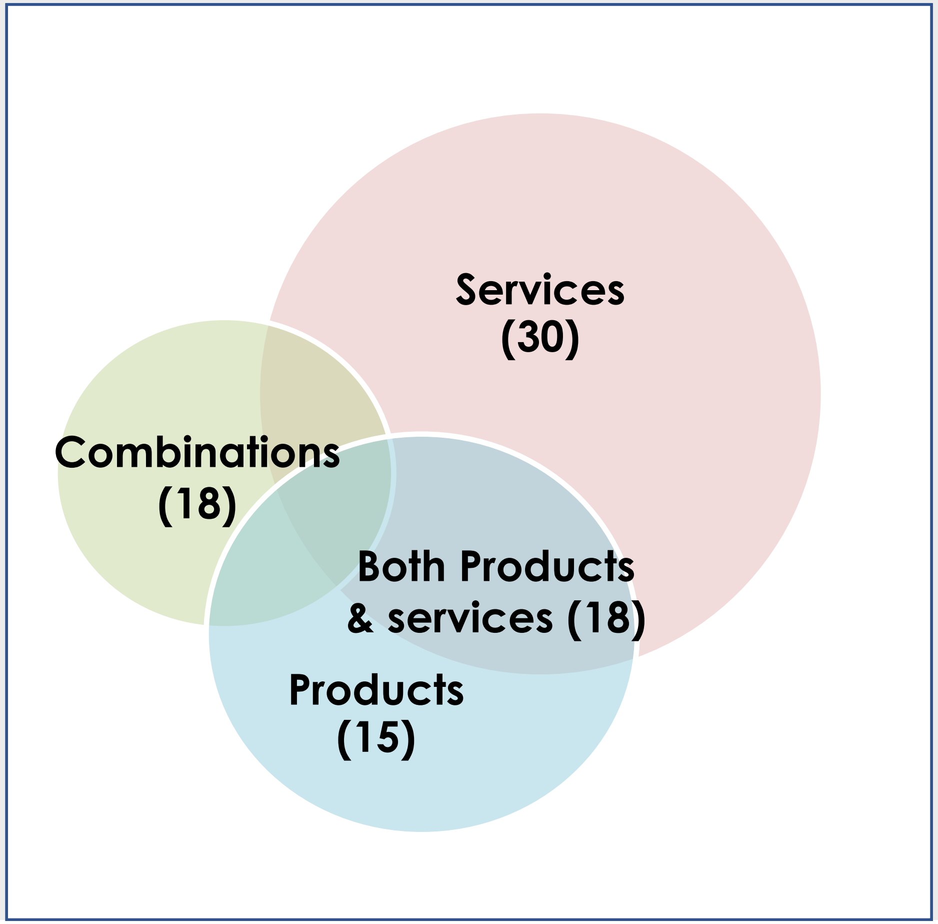
Marketing or advertising e.g. agency or freelance	15
Membership, professional services & support organisation for businesses	9
Technology / Software	9
Property & Construction	6
Charity	5
Tourism, leisure & venues	4
Education and Training Providers & Universities	3
Events management	2
Finance & insurance	2
Health, medical & scientific products and services	2
Manufacturing & Engineering	2
Others	5



Products split by sector (2022)

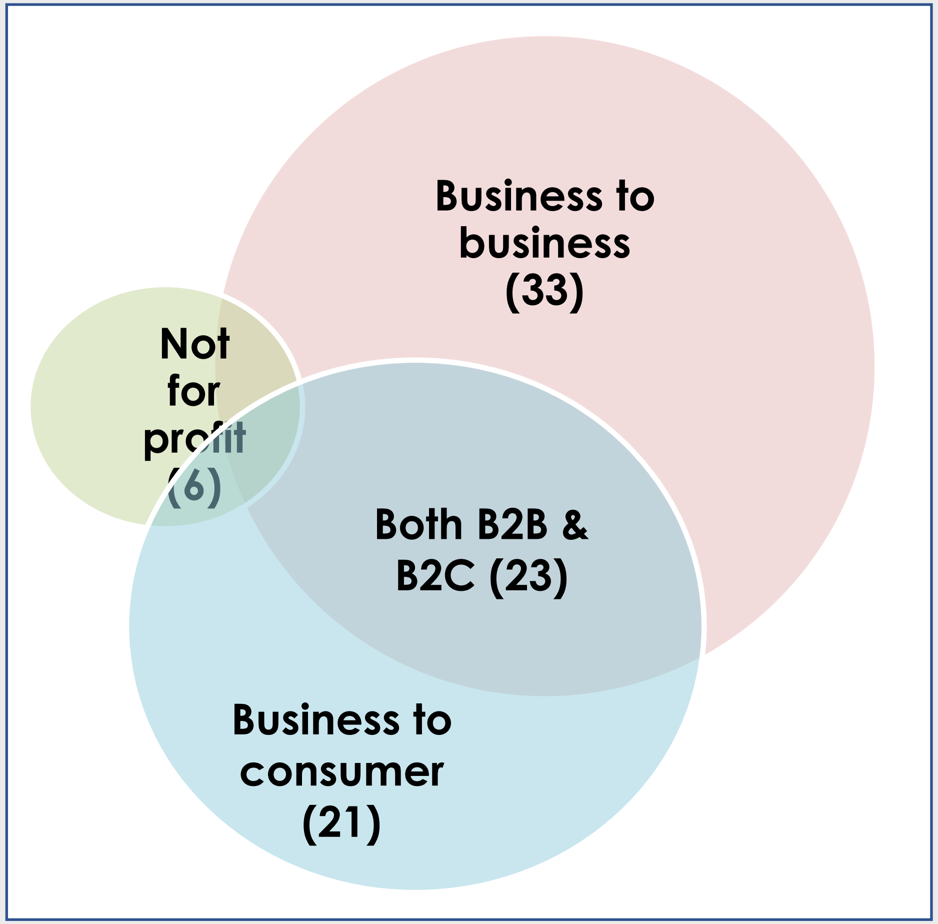
Products offered

• Technology / Software	5
• Manufacturing & Engineering	4
• Shoes, clothing, apparel & accessories	4
• Charity	2
• Education and Training Providers & Universities	2
• Health, medical & scientific products and services	2
• Home and Garden	2
• Jewellery & Gifts	2
• Marketing or advertising e.g. agency or freelance	2
• Membership, professional services & support organisation for businesses	2
• Property & Construction	2
• Tourism, leisure & venues	2
• Others	9



Who do they sell to (2022)

- 62 organisations sold B2B (solely or in combination)
- There was not a direct correlation between what organisations sell and who they sell it to, i.e. products or services or both
- For example, there were 30 companies that just sold services and of these 15 were just B2B



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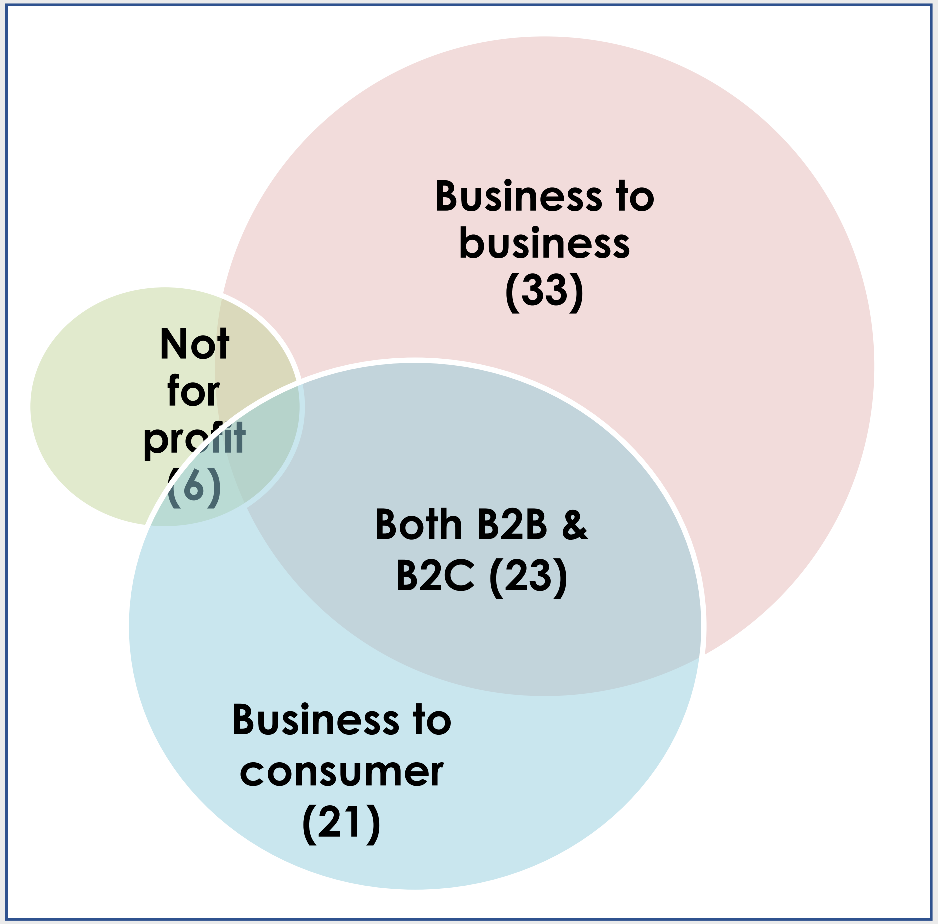
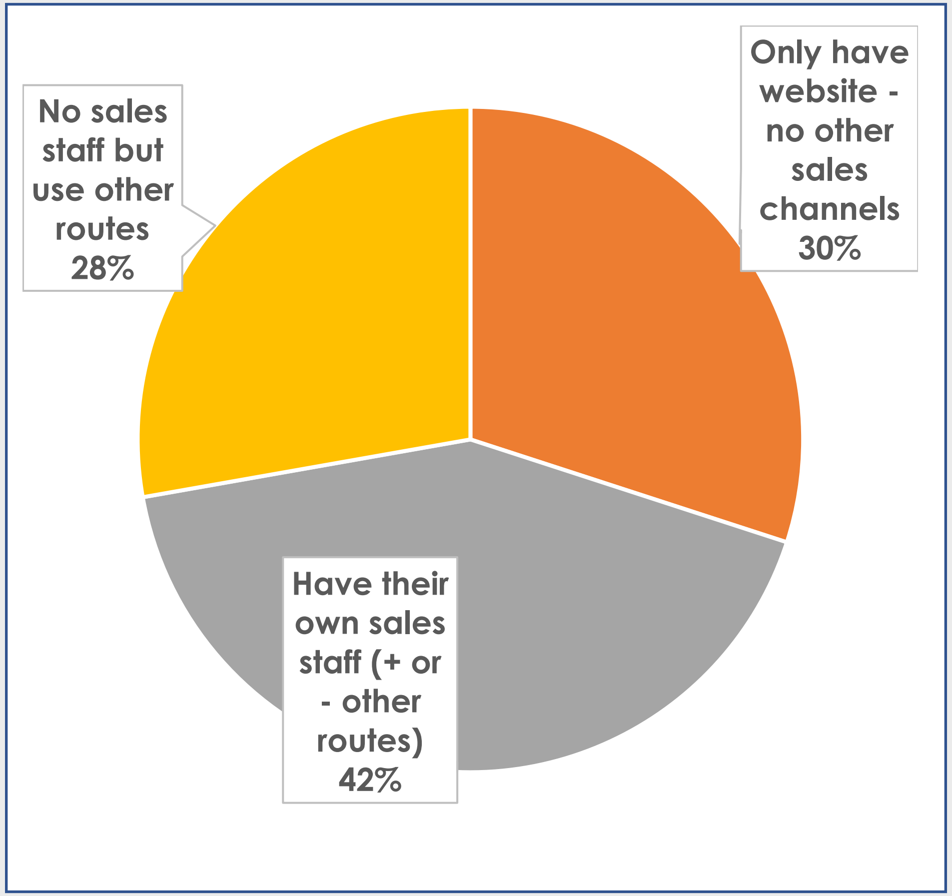
Who they sell to	Number of organisations
Business-to-Business (B2B)	33
Business-to-consumer (B2C)	21
Not for profit (NFP)	6
B2B & B2C	23
NFP & B2C	1
NFP & B2B	2
All 3	4
	90



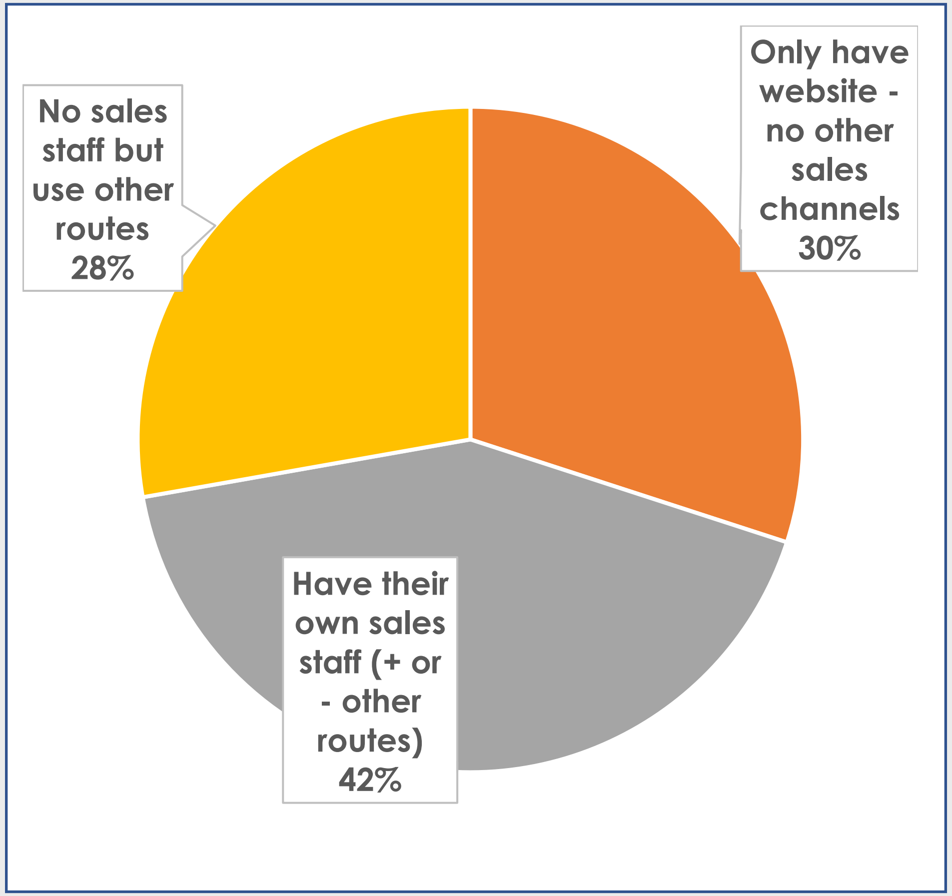
Routes to market (2022)



18% did not mention that they had a website

Routes to market (2022)

Sales channel	Primary	Breakdown
Only have website - no other route	**27**	
Lead generation website		15
Ecommerce site		6
Both websites		4
Others		2
Total with sales staff (+/- other routes)	**38**	
Own sales staff - no other sales route		6
Sales staff & website		29
Sales staff & 3rd party		2
Other combinations		1
No sales staff but use other routes	**25**	
Via 3rd parties e.g. Agents/Distributors/Resellers		1
Physical store(s) or trade desk		1
Other combinations		23
TOTAL	**90**	



18% did not mention that they had a website

Key findings (knowledge levels and skills)

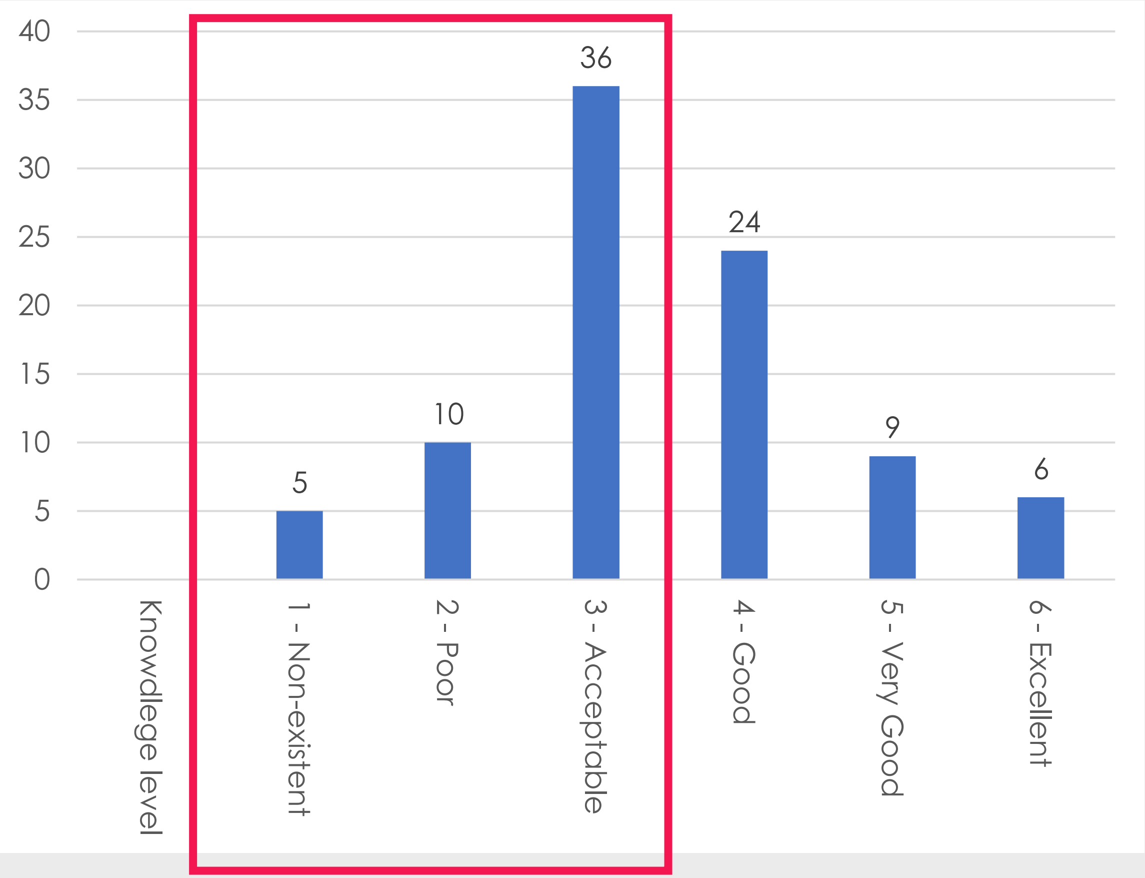
Who does the marketing (2022)

Make-up of the team	With no other support	With other types of support
No marketing undertaken	1	4
Dedicated individual (me)	24	16
Dedicated team (2 or 3)	6	7
Dedicated team (4 to 5)	6	1
Dedicated team (6 to 10)	1	1
Dedicated team (>10)	4	2
Someone else role	14	11
Outsourced to freelancer	1	9
Outsourced to agencies	1	16

- Of the 28 (31%) of organisations with a **dedicated team** – 22 (79%) of them employ 10 or more staff
- Of the 24 (28%) companies that **outsource to a 3rd party** – the number of staff and size has little effect (10 employed <10, 5 employed >250)

Digital marketing knowledge (2022)

- 51 or 56.7% that are only **acceptable or poor.** Of these:
  - The turnover of the company did not make much impact (10 out of 22 with a turnover of >£1m were acceptable of poor)
  - The size of the company did make a difference



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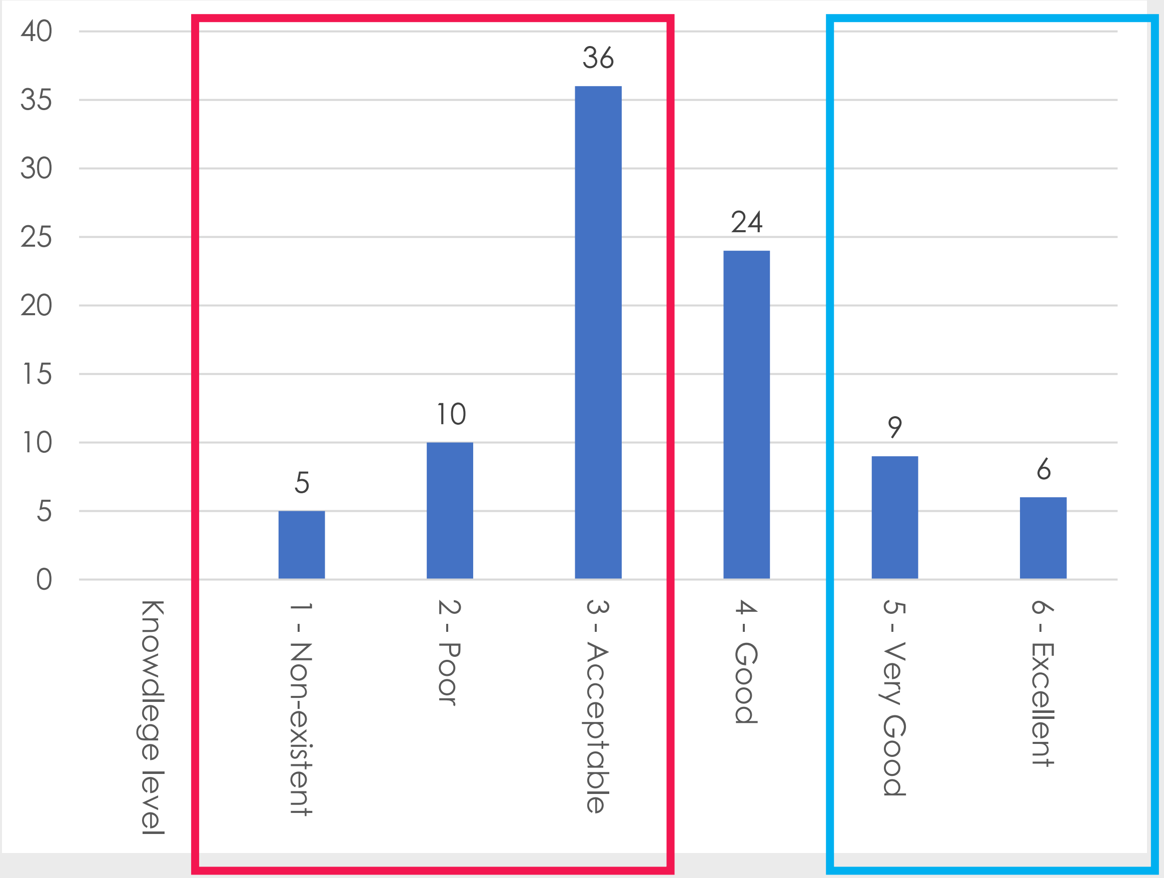
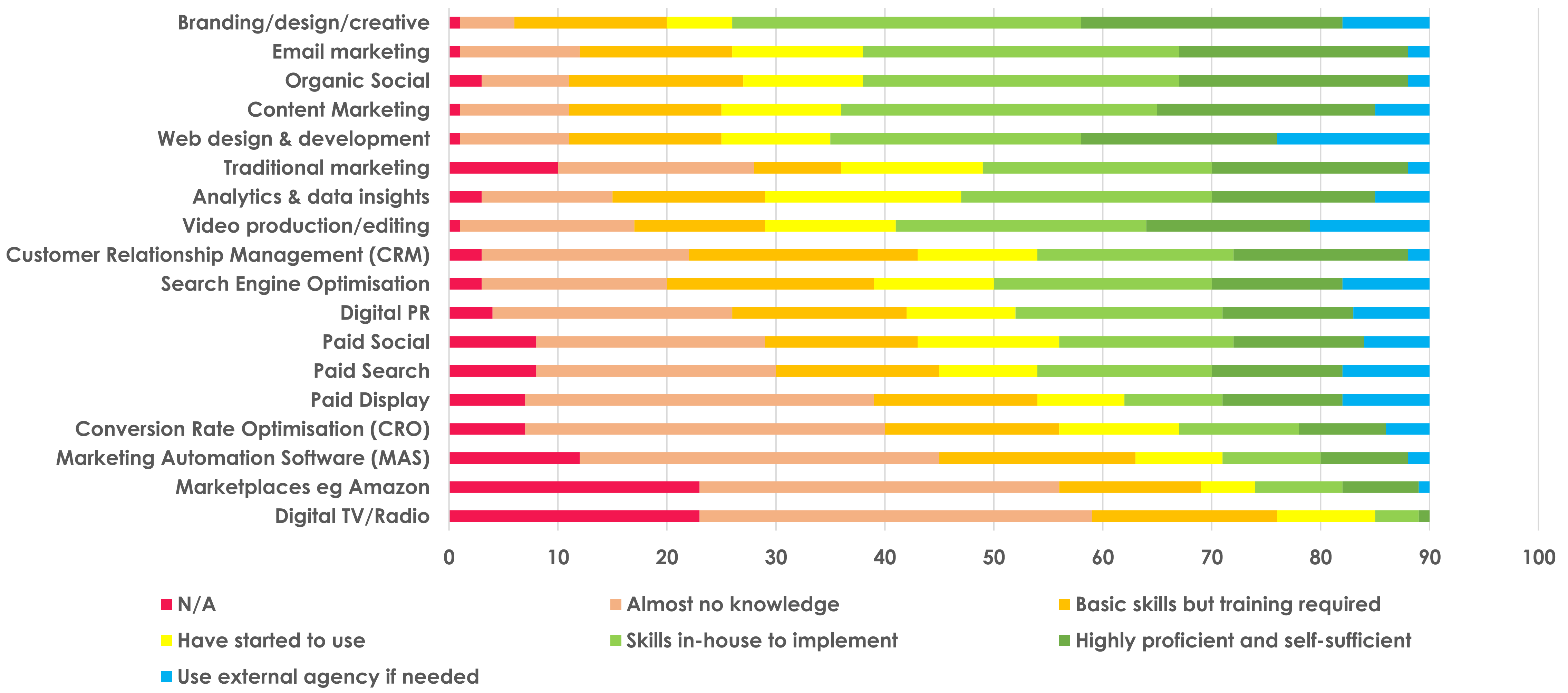
  - The size of the company did make a difference

- 15 or 16.5% of organisations said their overall digital marketing knowledge was **Excellent or Very Good**,
  - There was little impact of the size or turnover
  - 53% of these had their own dedicated team



Capability level by channels (2022)



Capability level by channels (2022)

- The channels where organisations **have no knowledge or training is required:**
  - Digital TV/Radio 59%
  - Marketing Automation Software (MAS) 57%
  - Conversion Rate Optimisation (CRO) 54%
  - Paid Display 52%
  - Marketplaces eg Amazon 51%
  - Customer Relationship Management (CRM) 44%
  - Digital PR 42%
  - Paid Search 41%
  - Search Engine Optimisation 40%

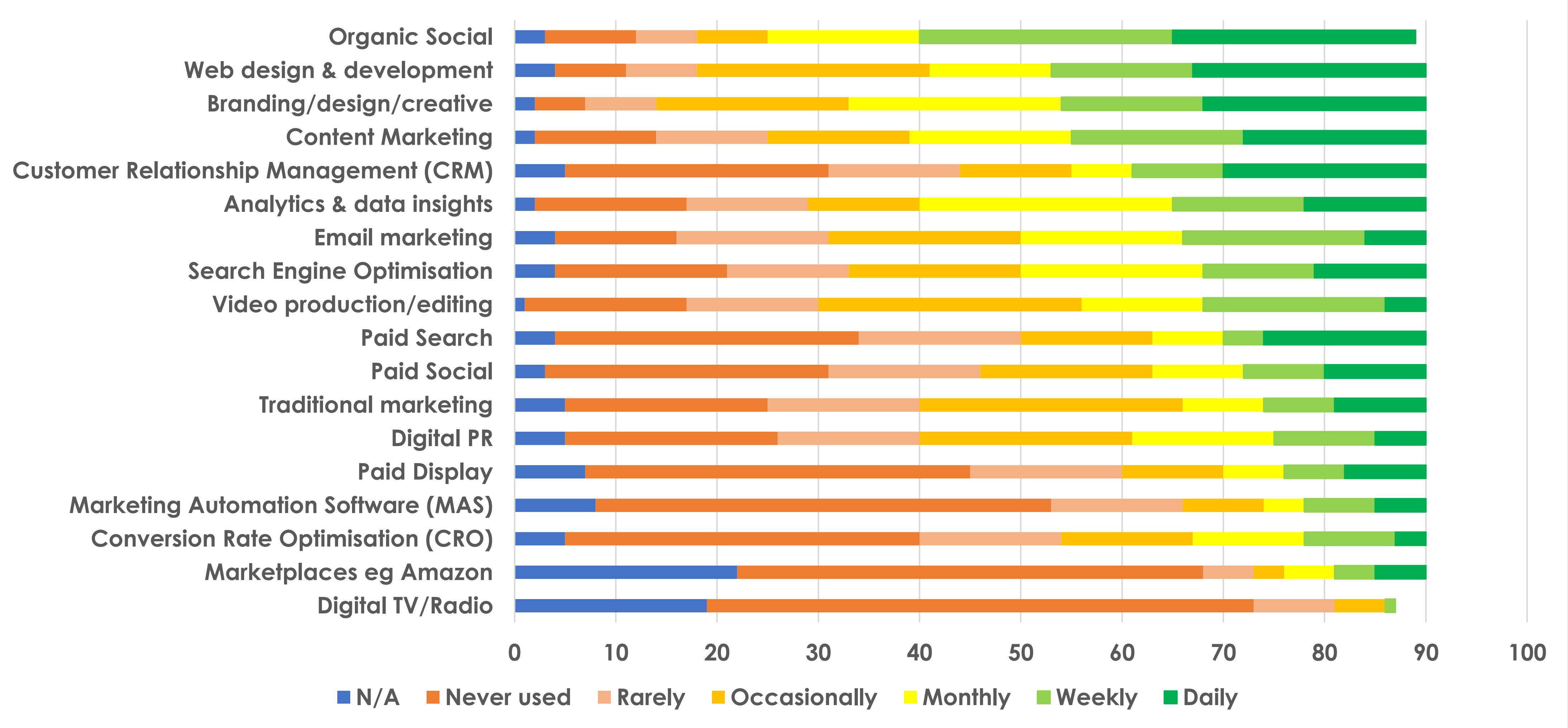
- The channels where the organisation have the **skills in-house or they are highly proficient:**
  - Branding/design/creative 62%
  - Organic Social 56%
  - Email marketing 56%
  - Content Marketing 54%
  - Web design & development 46%
  - Traditional marketing 43%
  - Video production/editing 42%
  - Analytics & data insights 42%

Using an agency - when needed (2022)

- The channels where the organisation have used an agency
  - Web design & development 16%
  - Video production/editing 12%
  - Paid Display 9%
  - Paid Search 9%
  - Search Engine Optimisation 9%
  - Branding/design/creative 9%

Key findings (marketing channels used)

Marketing channels used (2022)



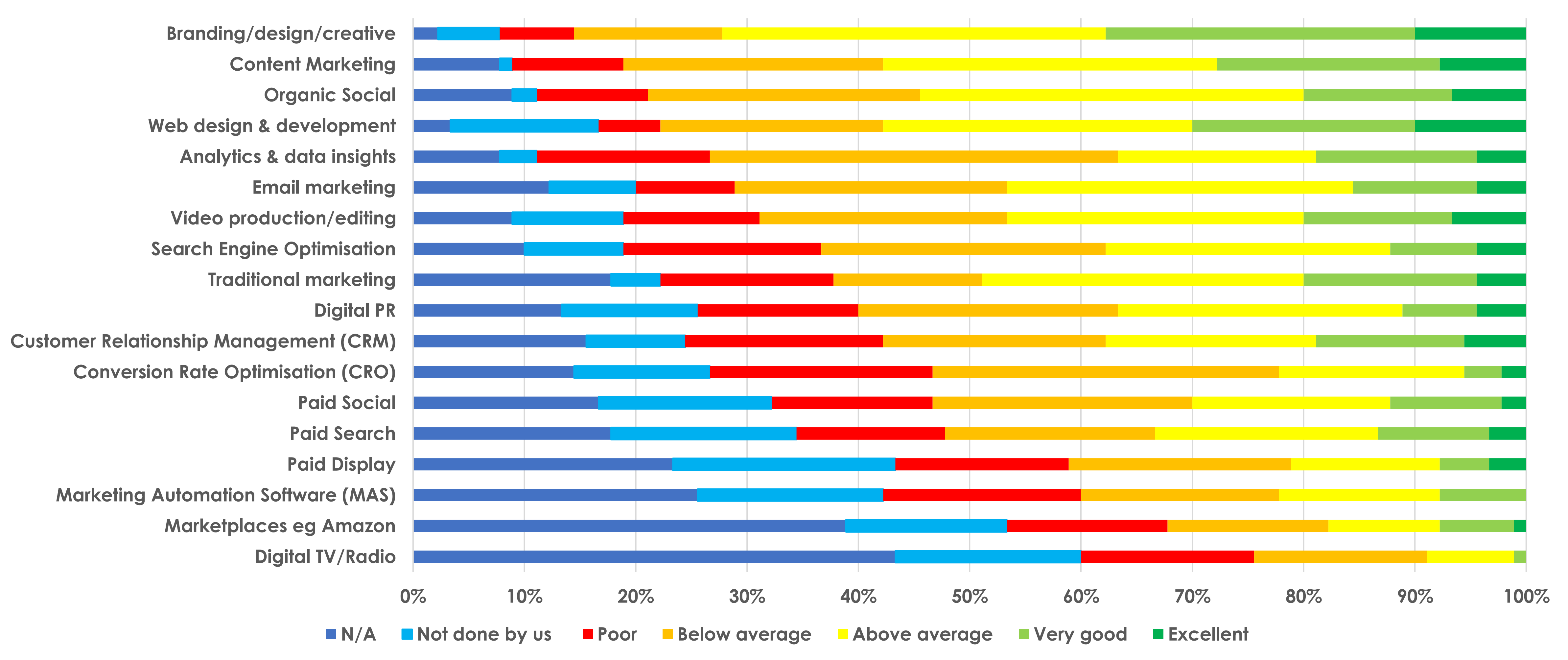
Most popular channels used (2022)

- The channels and techniques that were **most popular (% using daily or weekly)**
  - Organic Social 54%
  - Web design & development 41%
  - Branding/design/creative 40%
  - Content Marketing 39%
  - Customer Relationship Management (CRM) 32%
  - Analytics & data insights 28%
  - Email marketing 27%
  - Video production/editing 24%
  - Search Engine Optimisation 24%

Least popular channels used (2022)

- The channels that were **least popular (% N/A, never used, used rarely or occasionally):**
    - Digital TV/Radio 96%
    - Marketplaces eg Amazon 84%
    - Conversion Rate Optimisation (CRO) 74%
    - Marketing Automation Software (MAS) 82%
    - Paid Display 78%
    - Digital PR 68%
    - Traditional marketing 73%
    - Paid Social 70%
    - Paid Search 70%

Channels: Performance & success (2022)



Channels: Performance & success (2022)

- The channels and techniques that were **most successful (% Very Good or Excellent)**
  - Branding/design/creative 38%
  - Web design & development 30%
  - Content Marketing 28%
  - Traditional marketing 20%
  - Video production/editing 20%
  - Organic Social 20%

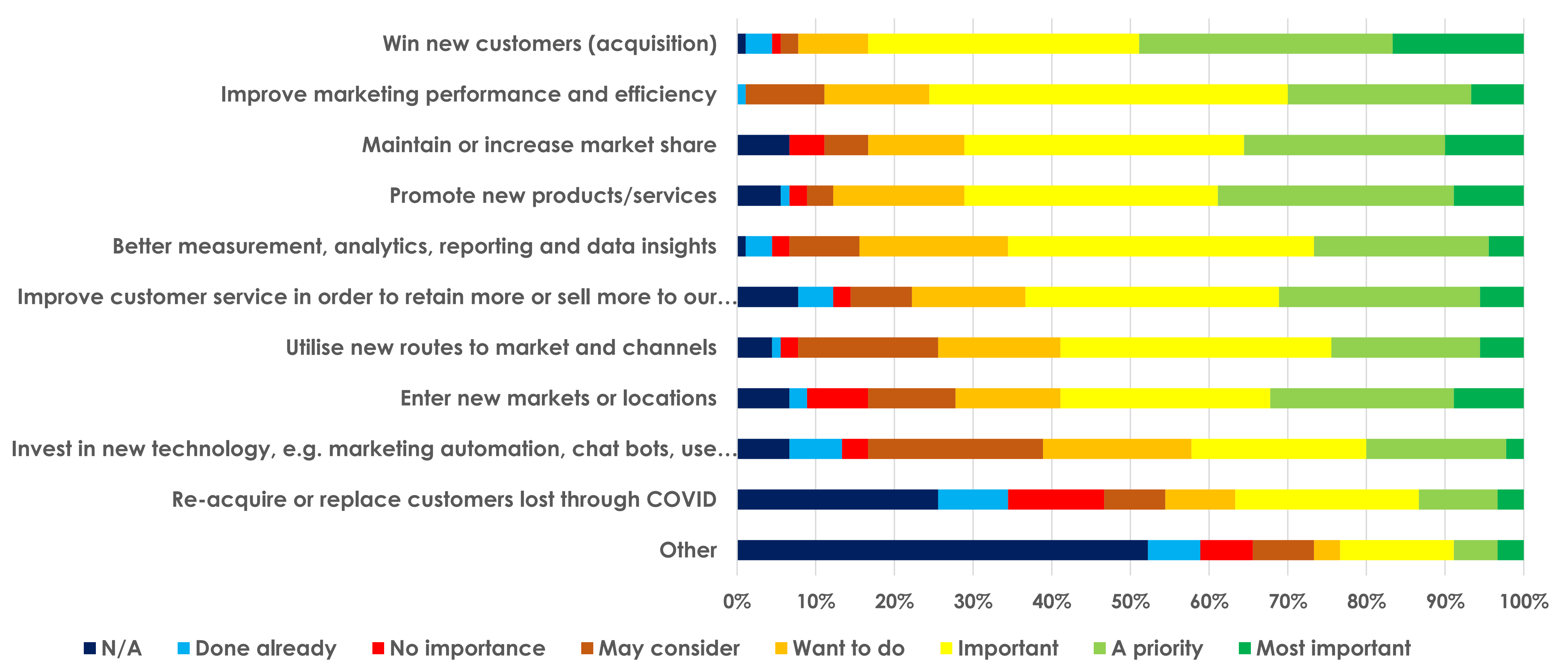
- The channels that **were least used or successful (% N/A, Never used, or Poor)**:
  - Digital TV/Radio 76%
  - Marketplaces eg Amazon 69%
  - Marketing Automation Software (MAS) 61%
  - Paid Display 60%
  - Paid Search 48%
  - Paid Social 47%
  - Conversion Rate Optimisation (CRO) 47%

Key findings (business & marketing objectives)

Business objectives (2022)

Objectives	Responses	% of responders
Take advantages of new opportunities and growth	56	62.2%
Grow moderately from our current position (1-20% growth)	28	31.1%
Grow significantly from our current position (20%-50% growth)	27	30.0%
Business as usual – carry on as we are currently doing	20	22.2%
Recover from the last 2 years and bring the business back to similar levels as pre-COVID	19	21.1%
Still trying to survive the impacts of COVID and keep the business afloat	11	12.2%
Grow significantly from our current position (>50% growth)	6	6.7%
Selling overseas	6	6.7%
Others	9	10.0%

Marketing objectives (2022)



Marketing objectives (2022)

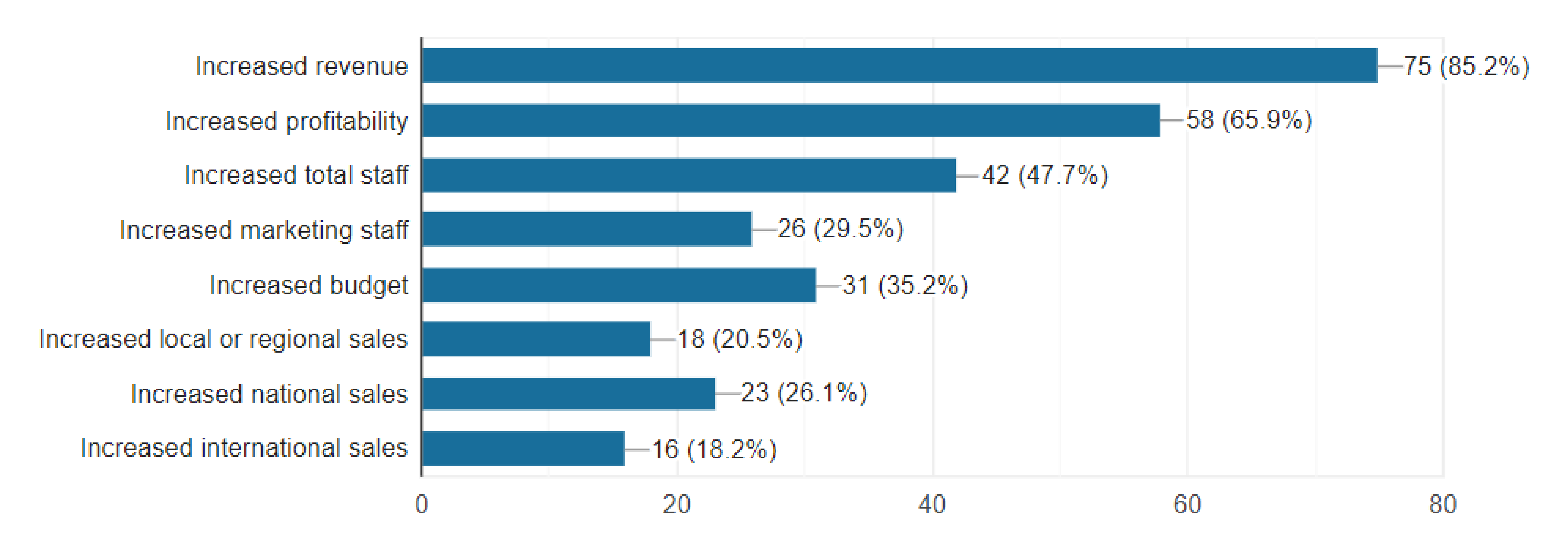
- **The most important marketing objectives (% Important, Most Important or A Priority):**

• Win new customers (acquisition)	83%
• Improve marketing performance and efficiency	76%
• Promote new products/services	71%
• Maintain or increase market share	71%
• Better measurement, analytics, reporting and data insights	66%
• Improve customer service in order to retain more or sell more to our existing clients	63%

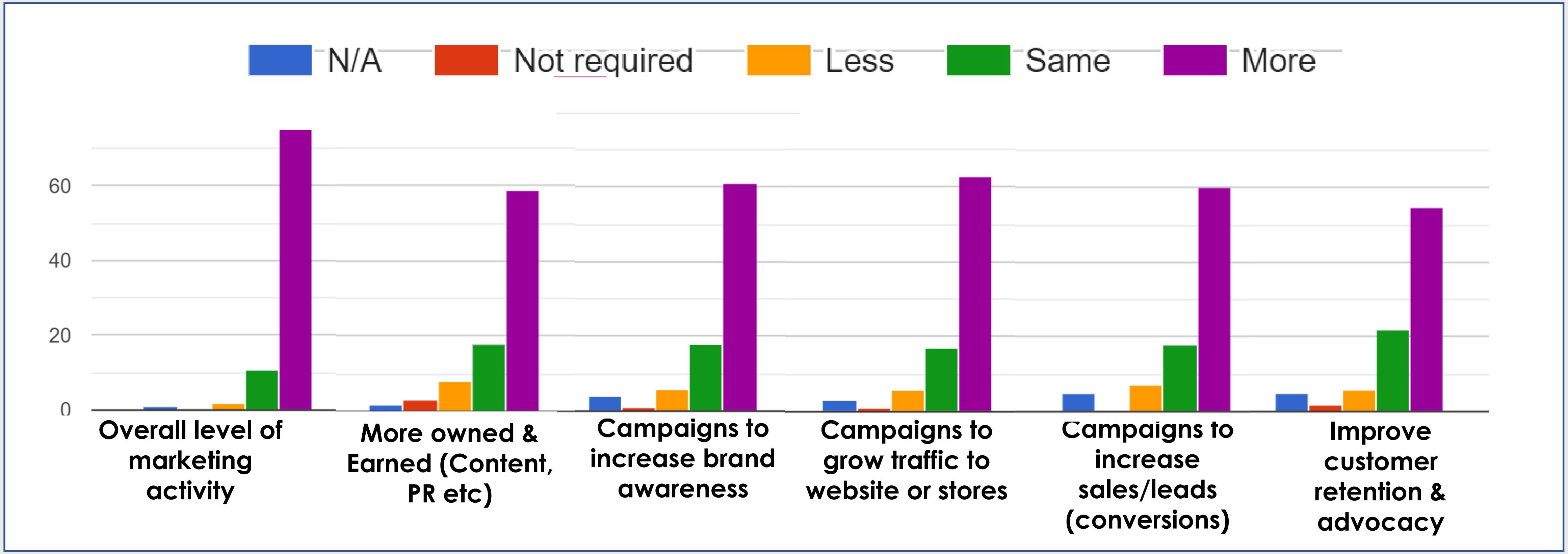
- **The least important marketing objectives (% N/A, Done already, No Importance):**

• Other	66%
• Re-acquire or replace customers lost through COVID	47%
• Invest in new technology, e.g. marketing automation, chat bots, use of AI etc	17%

Do you expect your company to grow in 2022?

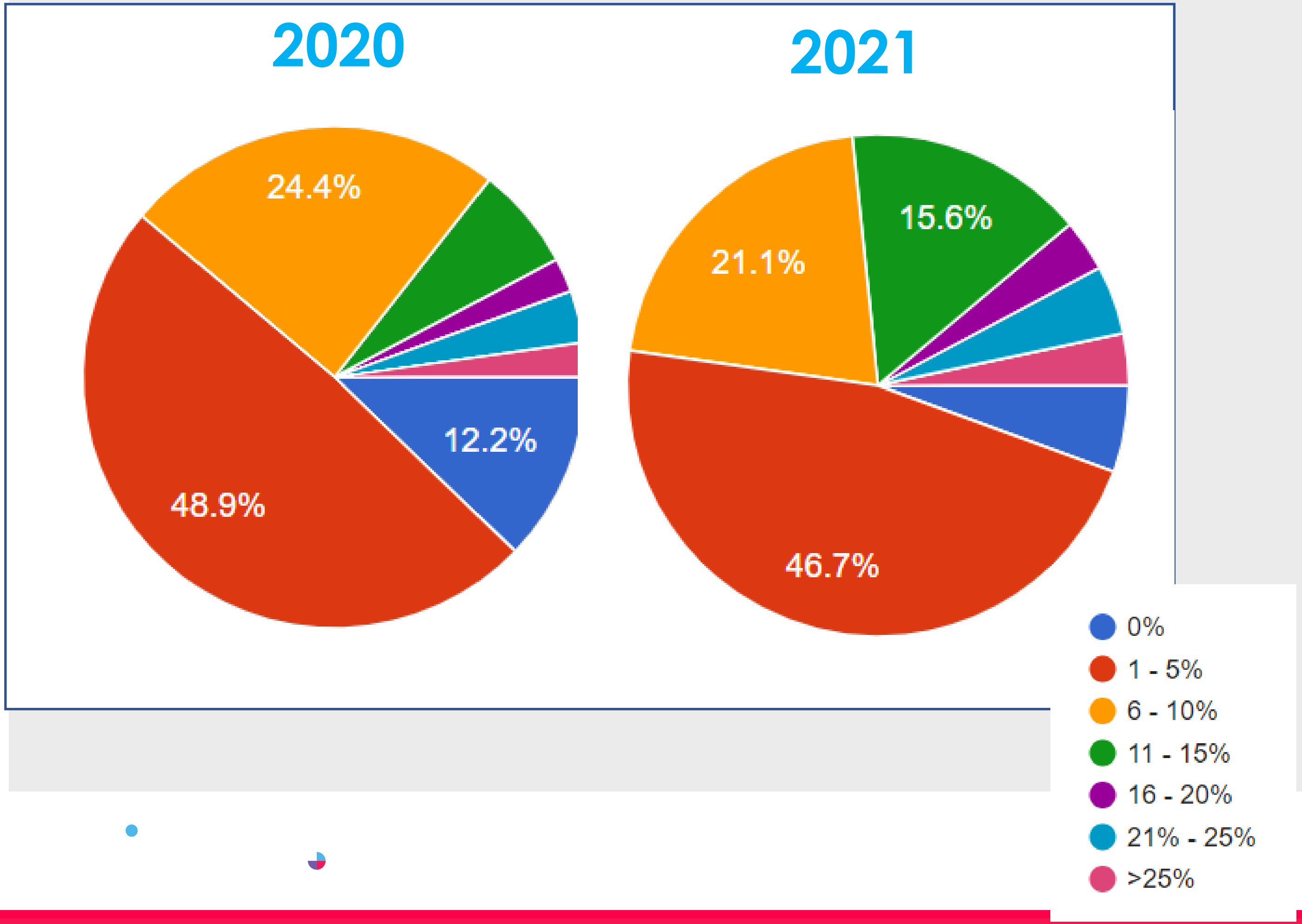


What will change – more activity (2022)



Key findings (budgets)

Budgets – proportion of revenue (21 vs 22)



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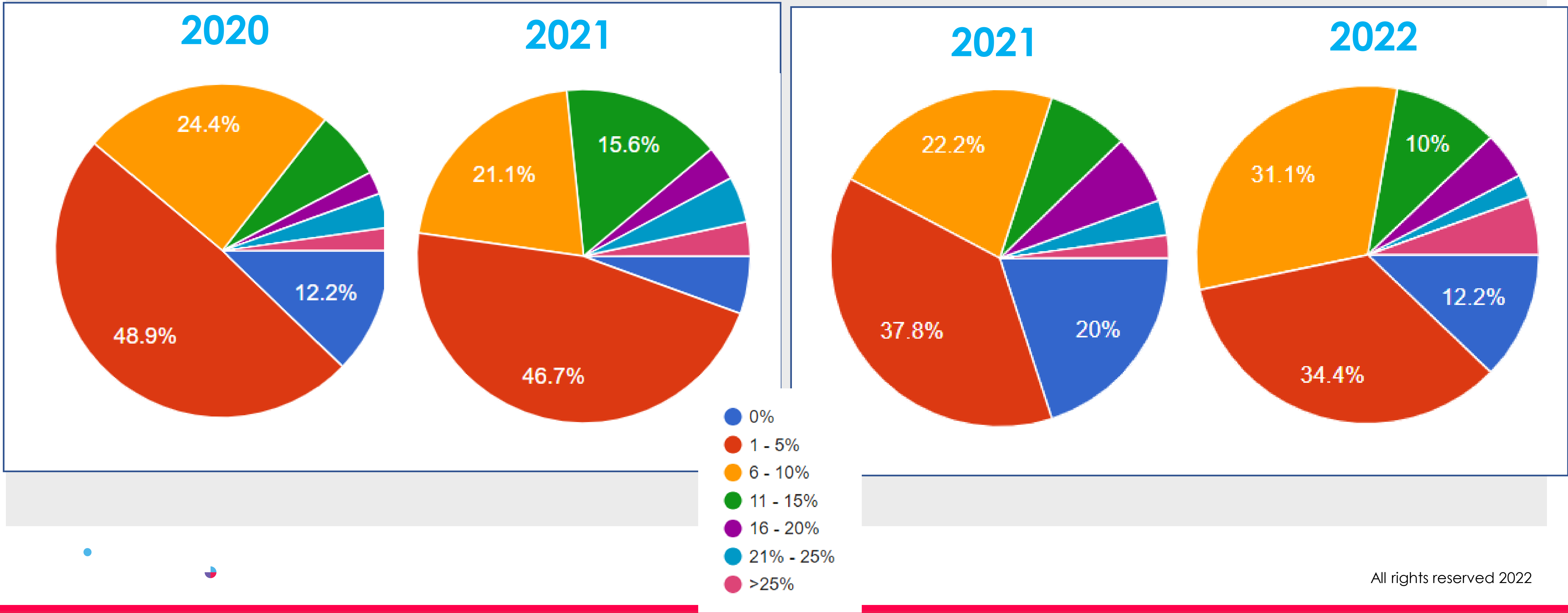
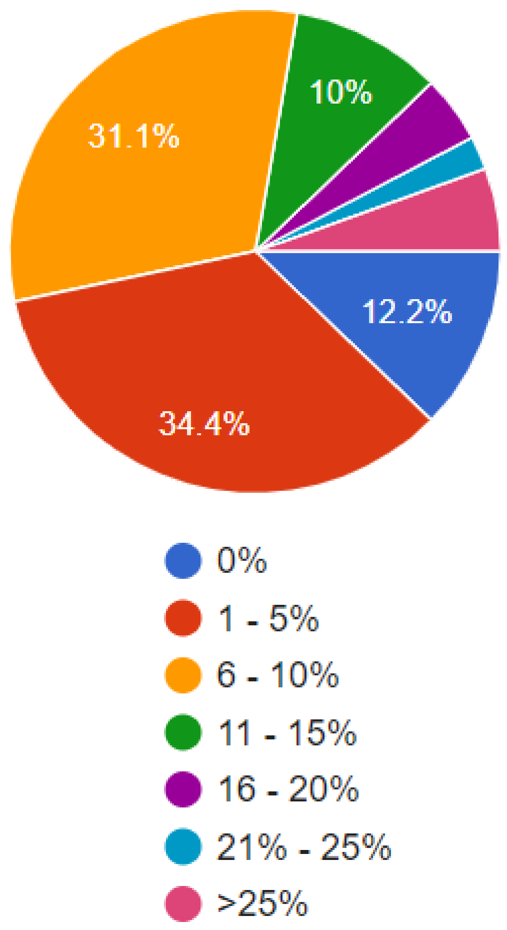


Budgets 2022 – Analysis

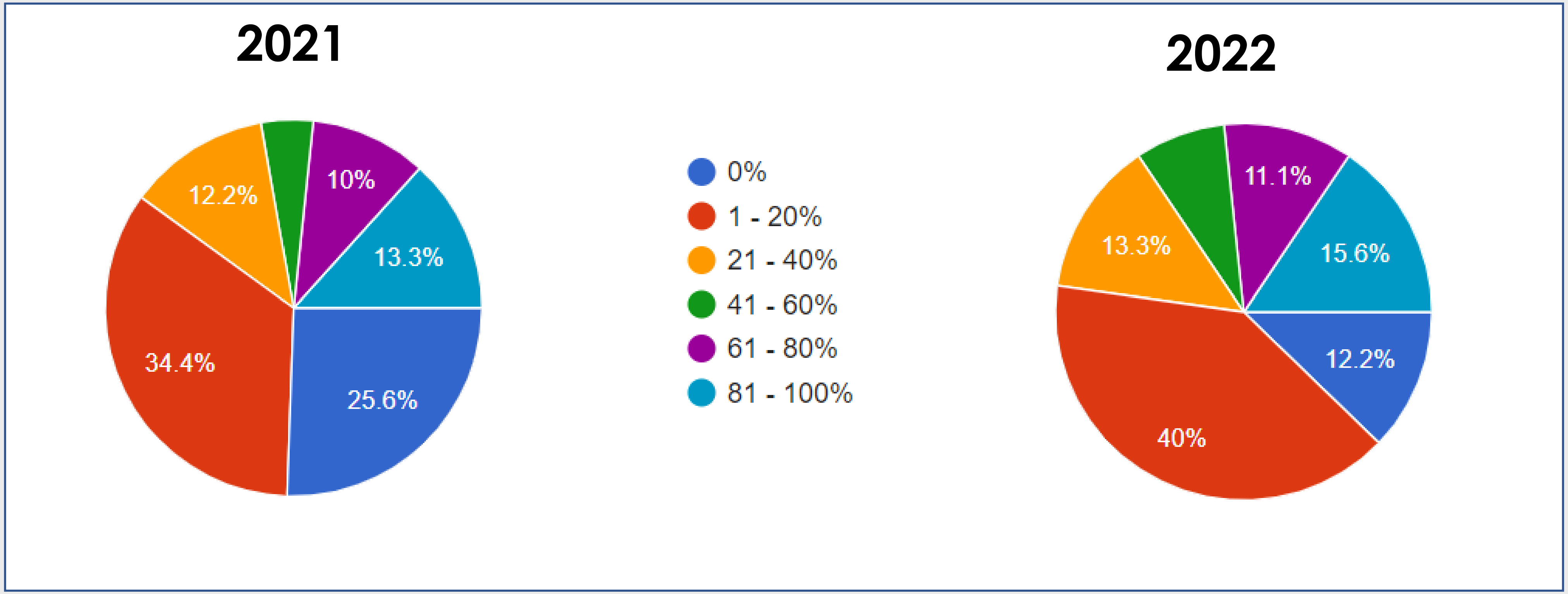
	No budget or details	1 - 5%	6 - 10%	11 - 15%	16 - 20%	21% - 25%	>25%	Total
<£100k	8	12	9	3	1	2	4	**39**
£101k – 500k	1	4	6	3				**14**
£501k – 1m		5	5	1	1			**12**
£1.1m – 2.5m		5	4	1	1			**11**
£2.6m – 5m		1	1					**2**
£5.1m – 10m		3						**3**
£10.1m – 50m		1		1	1			**3**
£50m - £100m	1		1					**2**
>£100m	1		2				1	**4**
Total	**11**	**31**	**28**	**9**	**4**	**2**	**5**	**90**



Change in budget 2022

	Total	Decrease	No Change	Increase
<£100k	39	4	20	15
£101k – 500k	14	3	8	3
£501k – 1m	12	1	7	2
£1.1m – 2.5m	11		8	3
£2.6m – 5m	2		2	
£5.1m – 10m	3		3	
£10.1m – 50m	3		2	1
£50m - £100m	2		2	
>£100m	4		2	1
Total	90	8 (9%)	54 (30%)	25 (27%)

Budgets – % spent on digital (2022)

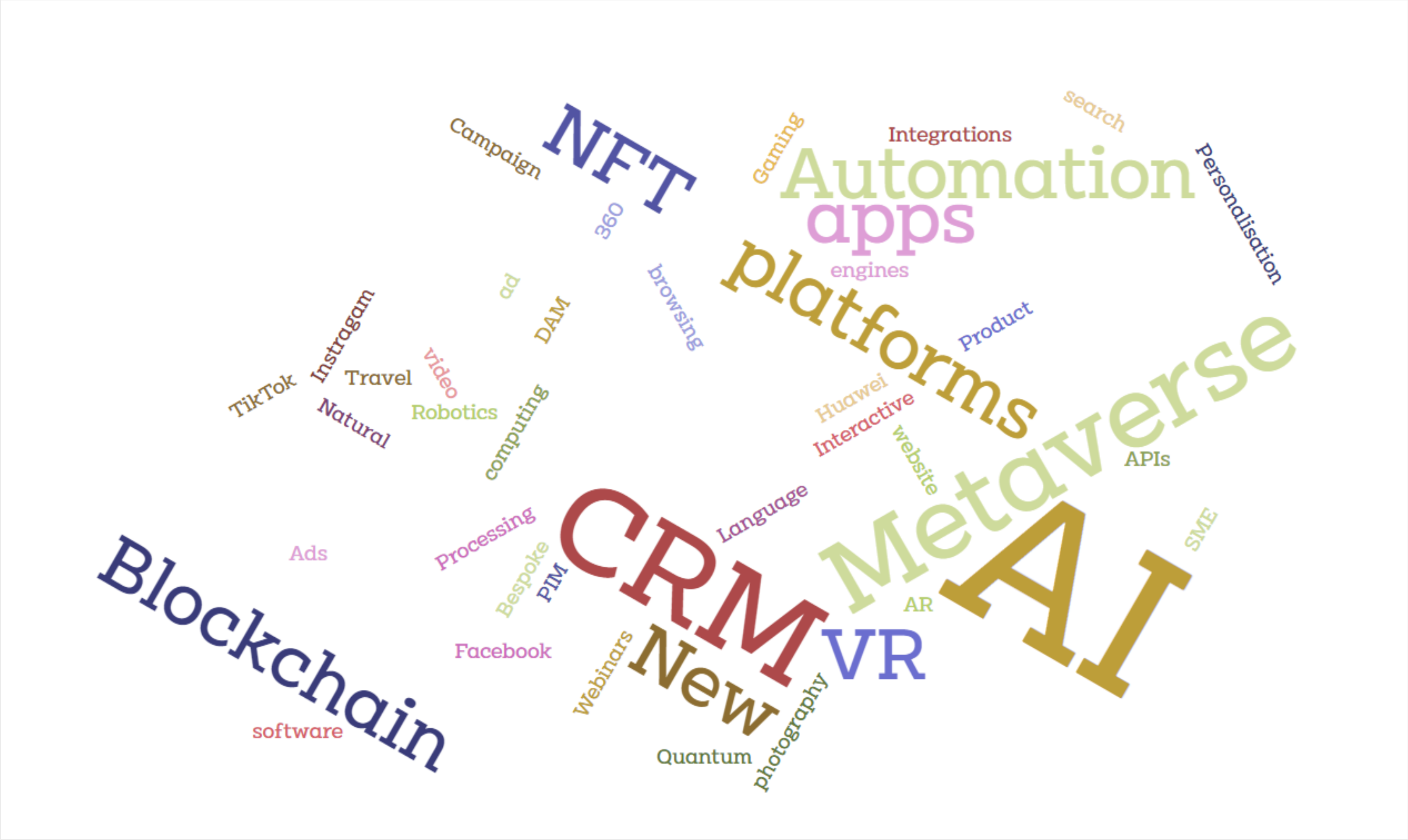


Key findings (what's new?)

New channels and techniques (2022)

- **The most mentioned**
  - Virtual events 13
  - Online training, 11
  - Live events, 8
  - Webinars, 7
  - Podcasts, 3
  - SEO, 3
  - Social media, 3
  - LinkedIn, 2
  - Networking, 2
  - TikTok, 2
  - Training, 2
  - Video, 2

Emerging technologies (2022)



Help or training needed (2022)

Thank you
Any questions?

Ann Stanley
ann@anicca.co.uk
07930 384443

anicca
data driven digital marketing