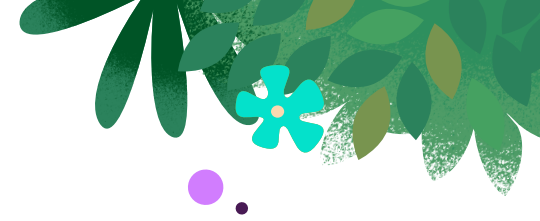




Communications Marketers Speak Out

The state of marketing according to 293 global marketers in the communications industry.



Executive Summary

As smartphone subscriptions outnumber the global population 8.6 billion to 7.9 billion,¹ marketers in the communications industry face unique and growing challenges. The advent of next-generation mobile services, high-speed internet, and rapidly advancing technology gives consumers more options than ever. And while the demand for bandwidth and digital services is driving global growth,² most marketers struggle to keep up with industry trends, such as cable and internet commoditization and competition from digital disruptors.³

Differentiating requires communication service providers (CSPs) to deliver exceptional experiences that attract and retain customers. This is easier said than done, as service providers face uncertain market conditions, changing

consumer preferences, and massive investments in technology. This year's "State of Marketing" report helps guide marketers through shifts in strategy and offers metrics to evaluate their marketing capabilities among their peers.

This e-book is based on a third-party, double-blind survey conducted from June 30 to August 8, 2022, and reported on in the Salesforce "State of Marketing" report. The report generated 6,000 responses from marketing managers, directors, VPs, and CMOs across 35 countries. This e-book is focused on the responses of 293 communications marketers only.



Key Takeaways

The most effective marketers are business drivers working at the intersection of sales and service to create personalized and differentiated experiences. To meet the moment, communications marketers must focus on the following:

- 1 Facing data-driven challenges
- 2 Defining KPIs for customer engagement
- 3 Taking a more strategic approach to marketing optimization

1. "Number of mobile (cellular) subscriptions worldwide from 1993 to 2021." Statista, [statista.com/statistics/262950/global-mobile-subscriptions-since-1993](https://www-statista-com.translate.googl/statistics/262950/global-mobile-subscriptions-since-1993). November 2022.

2. "Content Providers Binge on Global Bandwidth." Teleography, blog.telegeography.com/content-providers-binge-on-global-bandwidth. June 2022.

3. "Trends in the Communications Industry." Salesforce, [salesforce.com/resources/articles/the-communications-industry-is-changing](https://www.salesforce.com/resources/articles/the-communications-industry-is-changing). October 2022.

Shifts in Communications Marketing

The changing expectations of customers are forcing communications industry marketers to concentrate on unifying customer data, modernizing technology, and deploying new strategies.

Facing New Challenges

Macroeconomic uncertainties, shifts in customer behaviors, and emerging technologies are all rocking the boat for communications marketers and reshaping their focus. The top challenge is unifying customer data sources – a significant shift from last year as communications marketers reconcile a surge in data sources with privacy regulations while trying to achieve a 360-degree view of customers. Communications marketers also report that measuring the ROI of marketing efforts is a challenge, undoubtedly straining human resources and complicating their ability to get an accurate view of campaigns and marketing spend.

Top Challenges		Movement 2021 to 2022
1	Unifying customer data / comprehensive view of customers	↑ #12
2	Measuring marketing ROI / attribution	↑ #8
TIE	3 Insufficient human resources / collaboration	↑ #15 #5

“What makes T-Mobile special is our personal connection to our customers. We think a lot about how to get closer to customers, and we rely on our teams, stores, call centers, and culture to help foster that relationship.”

Mike Katz

CMO, T-Mobile

Read more at sdfc.co/tmobile





Focusing on New Priorities

New challenges call for innovative solutions, and communications marketers are full steam ahead as they strategize how to do more with less. Businesses have turned to improving their use of tools and technologies and modernizing their tech stack to automate and streamline operations. Communications marketers are also braving new waters with innovative channels, taking advantage of opportunities to reach prospects and customers by tapping into experimental strategies and tactics.

Top Priorities 		Movement 2021 to 2022
TIE 1	Modernizing and improving the use of technologies	 #6 #8
2	Complying with privacy regulations	 #13
3	Experimenting with new marketing strategies / tactics	 New



“The future of the telecommunications industry relies on strategic investment in new opportunities, as well as commitment to digital technologies, that will improve customer experience, business agility, and operational efficiency.”

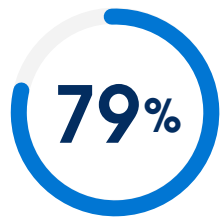
David Fan

VP & General Manager, Communications Industry, Salesforce

Increased Focus on the Customer Experience

Differentiating Through Experiences

Consumers want to feel valued throughout the customer lifecycle. While 81% of communications marketers believe the customer experience is a key competitive differentiator, they also recognize that meeting or exceeding customer expectations is more difficult than ever.



79% of marketers say meeting customer expectations is more difficult than a year ago.

Using the Metrics that Matter

Identifying and tracking the right metrics is critical as communications marketers face pressure to meet evolving customer expectations, work more efficiently, and maximize ROI. This year saw high year-over-year growth rates for marketing/sales funnel, customer referral rates, and customer lifetime value.

While revenue, customer satisfaction, and referrals continue to be priorities, there is a significant increase in tracking other leading indicators to optimize campaign performance. Metrics like content engagement, web/mobile analytics, and acquisition cost are helping marketers drive strategic decision-making regarding personalization and key experience touchpoints.

Metrics tracked by marketing organizations



Managing Data, Personalization, and Privacy at Scale

Achieving a Unified View of Customers

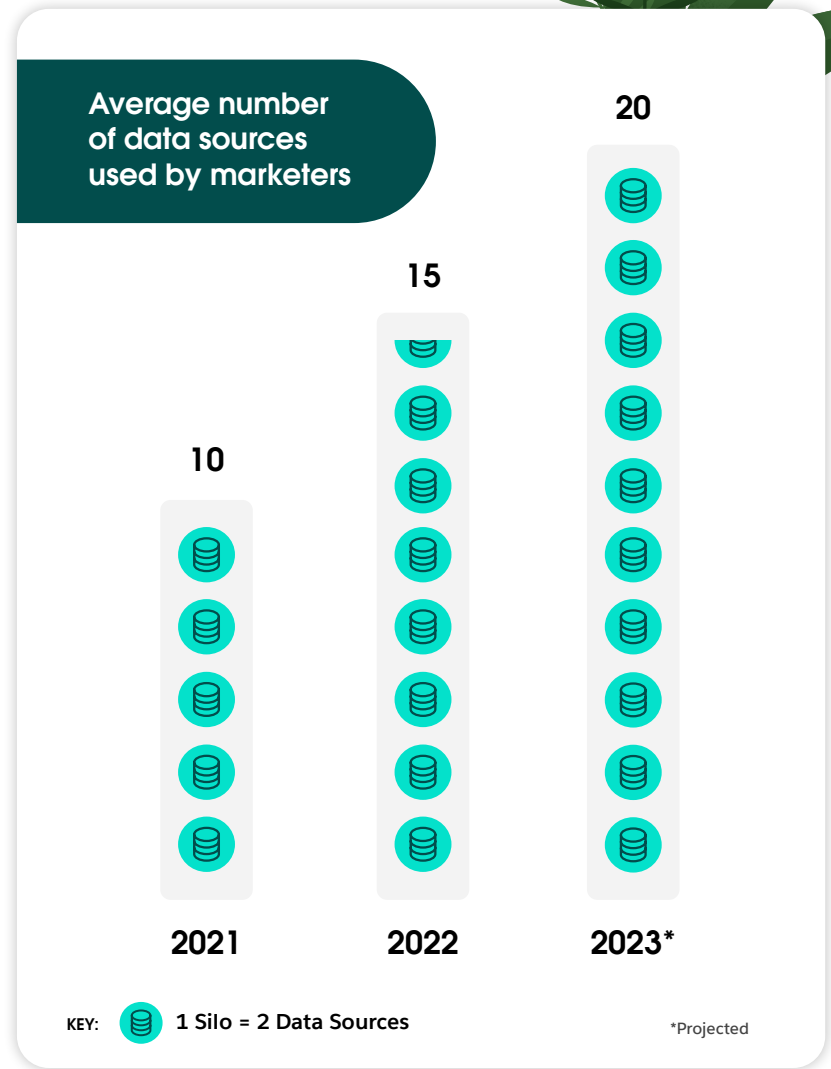
Communications marketers continue using more data sources to deliver valuable customer insights and align business strategies with shifting market dynamics. While new data sources help improve the precision and quality of customer engagement, it also makes unifying customer data across departments more difficult. Balancing personalization and privacy adds an additional layer of complexity. The need for a single view of the customer and the litany of data challenges make investments in integrated technologies more important than ever.



Leveraging First-Party Data

Despite the challenges of managing an increasing number of data sources, there is a growing emphasis on utilizing first-party data while ensuring compliance with consumer privacy regulations. With looming privacy changes and delayed cookie deadlines, marketing organizations must reevaluate their approach to data investments. As app and cookie tracking become less reliable, the value of third-party data is decreasing, and communications marketers recognize this shift.

Top 5 Data Sources Used by Marketing Organizations



Inside the Marketing Organization

Balancing Market Dynamics and Strategy

Communications marketers reported a diverse range of internal and external factors impacting their digital strategies. CSPs face challenges such as the digitalization of their platforms, new fiber and 5G offers, and increased scrutiny from both consumers and regulatory bodies. As a result, providers are now focusing on differentiating themselves by creating enhanced customer experiences, finding new avenues for revenue, and increasing efficiency.

Implementing Artificial Intelligence

With a solid foundation for data and measurement, communications marketers continue to embrace artificial intelligence (AI) to work faster and operate more efficiently. Fifty-six percent of communications marketers say they have a fully defined AI strategy, and 66% use AI for tasks such as optimizing and automating customer interactions, improving segmentation, and incorporating programmatic media campaign spending.

Factors Influencing Digital Strategy



The major factors influencing strategy include **business model transformation, regulations, competitive pressure, and internal talent.**

Communications Marketers Move Forward

Many marketers maintain a positive outlook as the communications industry looks toward the future. More than a third of communications marketers express complete satisfaction with their marketing organization's performance, demonstrating their optimistic resilience. However, CSPs continue transforming their business strategies in response to the pandemic. Marketers are now thinking about how they can plan to absorb the unpredictable, maintain healthy business operations, and address new market demands.

Technology will change how businesses interact with customers and vendors, but it won't change when and why they interact. Telecommunications companies have some of the richest first-party data assets globally. Companies that can gather information on intent and act on it will benefit the most.

Unifying customer data is at the core of CSP's strategy. With a strong understanding of regulatory and compliance requirements, marketers can provide instrumental value by using data to increase revenues, lower costs, and deliver more consumer benefits.

Marketing Cloud helps activate customer data to deliver personalization at scale and intelligent insights that enable marketing teams to optimize campaigns and maximize budgets.



Explore what more is top of mind for marketers. Read the full "State of Marketing" report.



