CUSTOMER ADVOCACY PROGRAMME SURVEY

2016

inEvidence
the customer advocacy specialist

ABOUT INEVIDENCE

We're a specialist global team known for expertise, creativity and delivery; building the strategies your business needs to unlock the innate trust we all share in authentic, relevant and human stories. We support our clients with anything customer-advocacy-shaped; from the creation of a few customer stories to multi-language full production videos, fully-outsourced complex global programmes, and everything in-between.

EXECUTIVE SUMMARY

Key trends for customer advocacy professionals in 2017

Video with everything

It used to be a luxury; not any longer. With creating engaging visual content as the top priority for advocacy programmes, 2017 is about video with everything. Video is now almost as common as the humble PDF.

Advocacy programmes increasing in importance

The profile of advocacy programmes continues to grow; 83% of respondents say their programme is more important than two years ago. With 2016 budgets increasing slightly and customer stories as the number-one content marketing format it's not really surprising.

Mobile and social first

The majority of programmes now consider the mobile and social sharing experience for their written and video stories, or planning to; 68% for mobile and 82% for social sharing. In fact, only 1% of responders don't see the point in optimising customer stories for mobile.

Advocate-based Marketing is the new ABM

Customer experience is set to overtake price and product as the key brand differentiator by 2020. Account-Based, Advocate Marketing, and other top-account programmes are merging into a single customer programmes approach. Human relationships and mutual value are back in 2017.

SURVEY METHODOLOGY AND PARTICIPANTS

This Customer Advocacy Programme Survey aims to better understand the current state of advocacy marketing and to identify new trends and key challenges as well as best practices.

85
responses from reference/ advocacy pros

70
discrete programmes

50
global brands

40%
of respondents Director or above

60%
of respondents have a global remit

PARTICIPATING ORGANISATIONS & PARTICIPATING AGENCIES

Participating brands include:

- 4net Technologies
- Allocadia
- Amdocs
- Atos
- Azzurri Communications
- CenturyLink
- Check Point
- Cisco
- Citrix
- Concur
- Dell
- Demandware
- doolytic
- EMC
- Fujitsu
- Hewlett Packard Enterprise
- Honeywell
- HP Inc.
- Intel
- Jive Software
- Kaspersky Lab
- Lexmark
- Lionbridge
- Microsoft
- Misys
- Nashua
- NEC
- NetApp
- Nutanix
- OpenText
- Qlik
- Red Hat
- Salesforce
- SAP
- SAS Institute
- Siemens
- TriZetto
- Unify
- VMware
- Vodafone

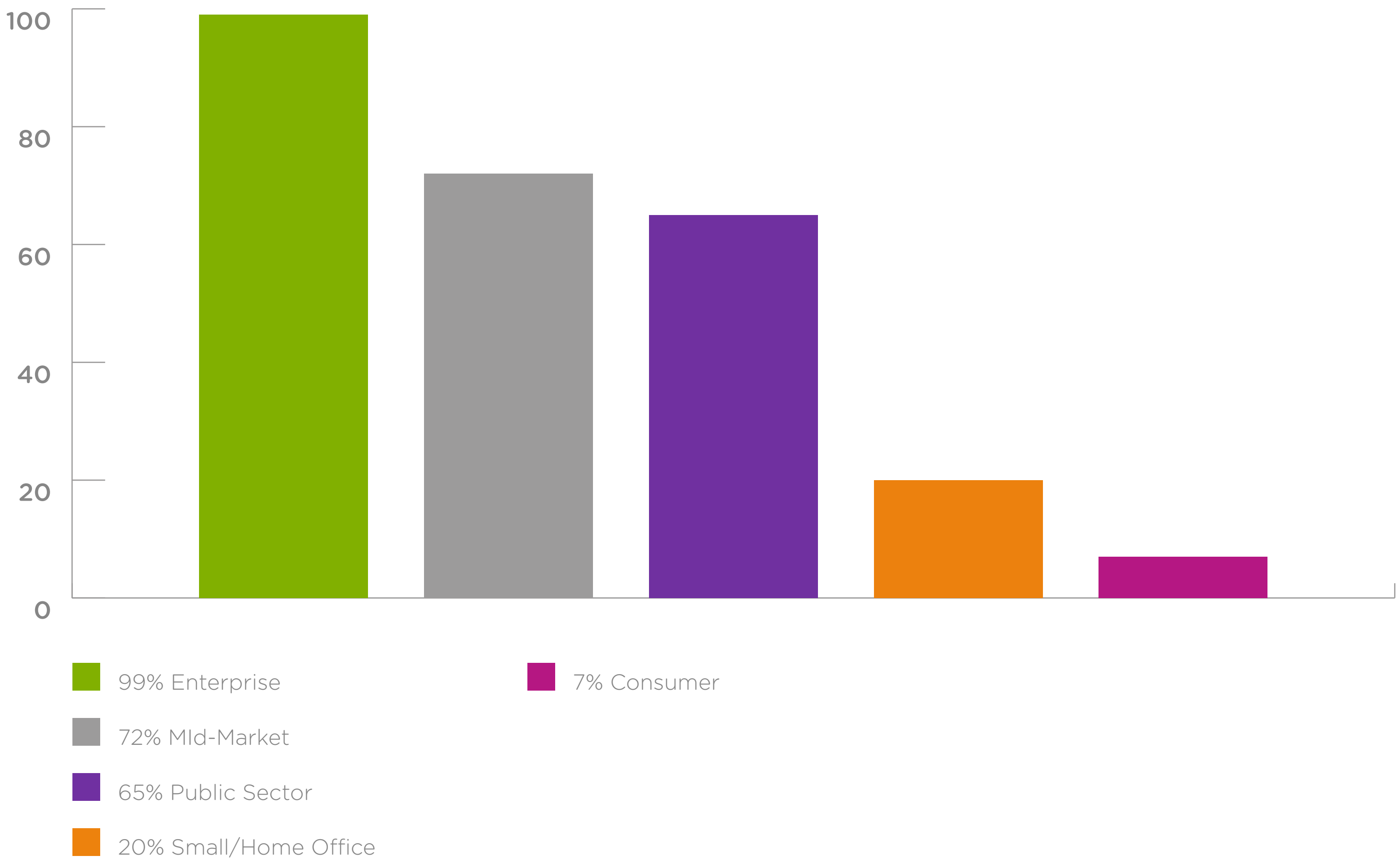
A TRULY GLOBAL SURVEY:

We received responses from across the globe; Africa, The Americas, Asia and EMEA

STUDY DATA

- Programme scope
- External support
- Budgets
- Importance & integration
- Engagement & incentives
- Customer story assets
- Automation vs humans
- 2017 focus

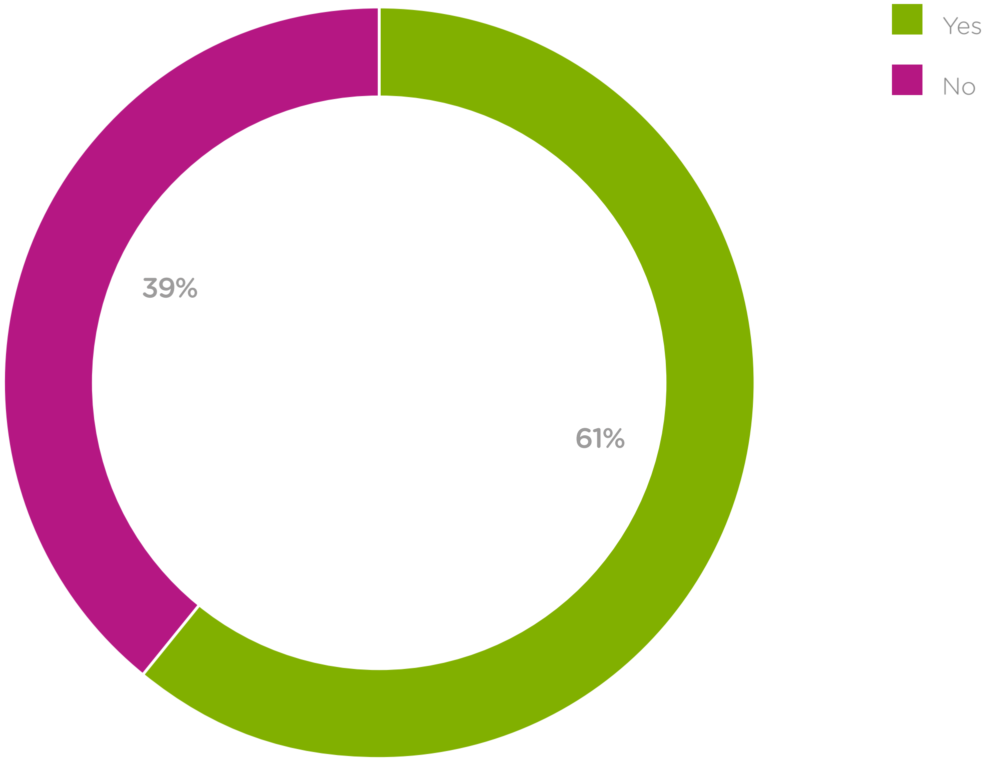
01. WHICH CUSTOMER **SEGMENTS** DOES YOUR PROGRAMME SUPPORT?



Analysis

- Unsurprisingly, almost everyone completing the survey said that their reference programme supports enterprise customers
- Four years ago just over 40% of programmes supported mid-market and public sector organisations. Now we see support for mid-market at 72% and the number working with the public sector at 65%
- The number of reference programmes supporting small office/home office and consumer audiences are very much in a minority

02. DOES YOUR PROGRAMME SUPPORT **CHANNEL PARTNERS** AND/OR RESELLERS AS WELL AS DIRECT?



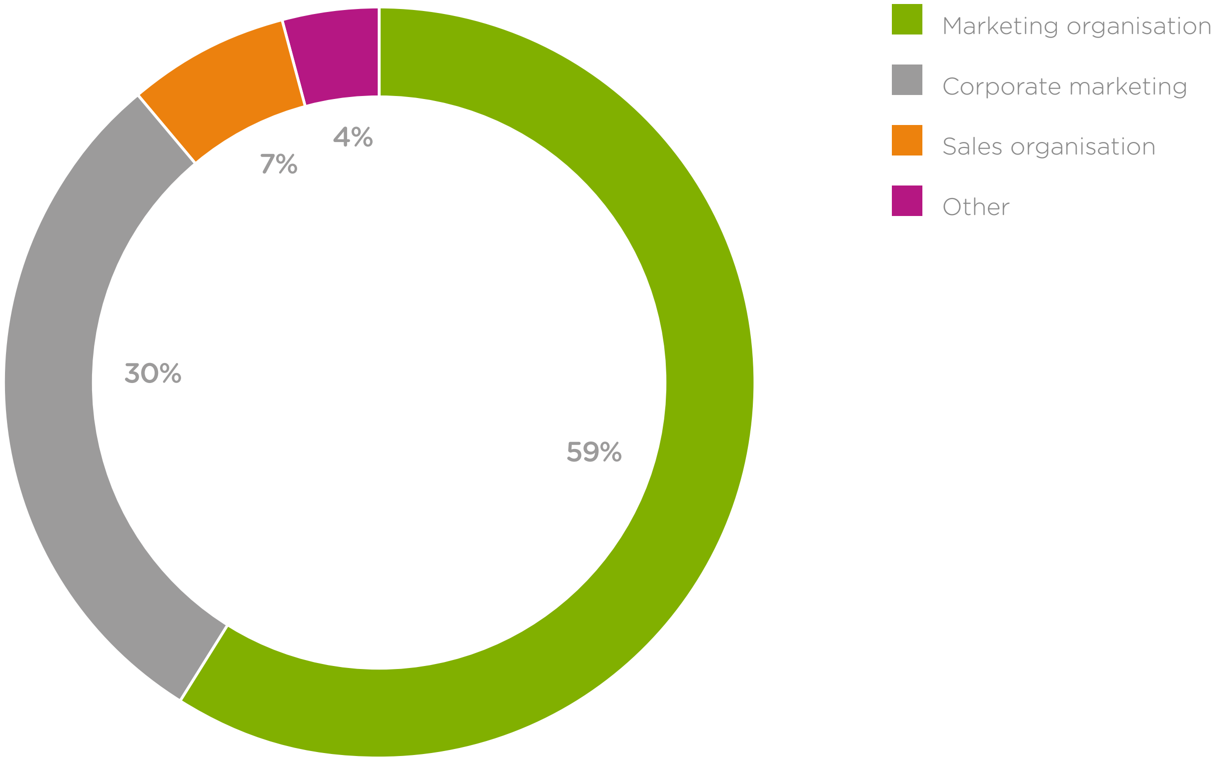
Analysis

- Around two thirds of programmes support channel partners/resellers (61%)
- Our experience shows that while most organisations support channel partners/resellers, few programmes have this as their focus

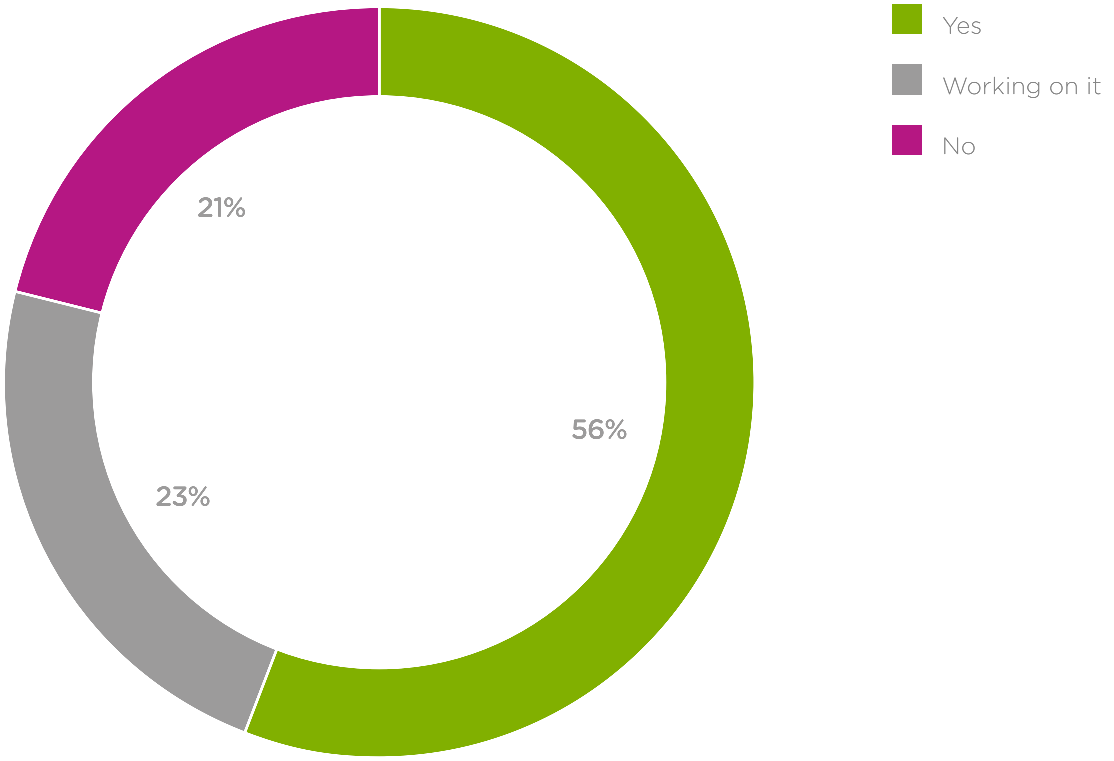
03. WHERE DOES YOUR PROGRAMME SIT WITHIN YOUR ORGANISATION?

Analysis

- Only 7% of advocacy programmes sit within the Sales organisation yet we know that they are the largest requestors for advocates



04. DO YOU HAVE A **BRANDED**, EXTERNAL, CUSTOMER REFERENCE/ ADVOCACY PROGRAMME?



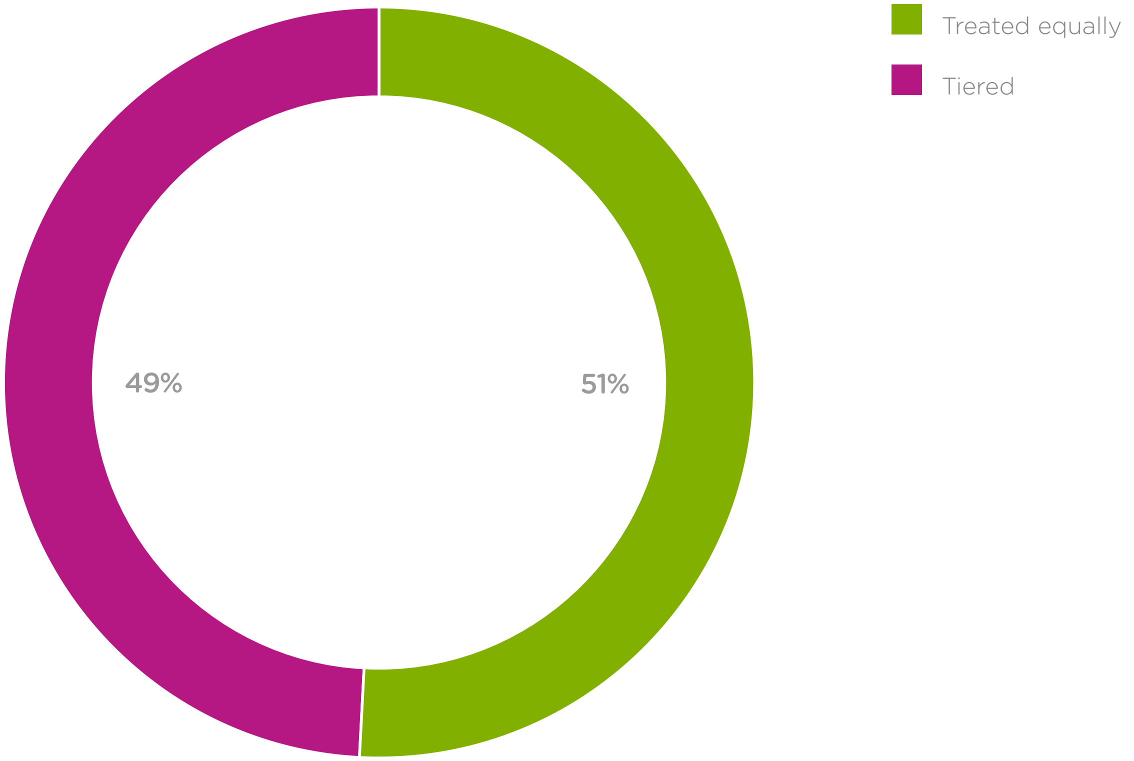
Analysis

- There is a pretty even split between those that have a branded advocacy programme (56%) and those that do not (44%)

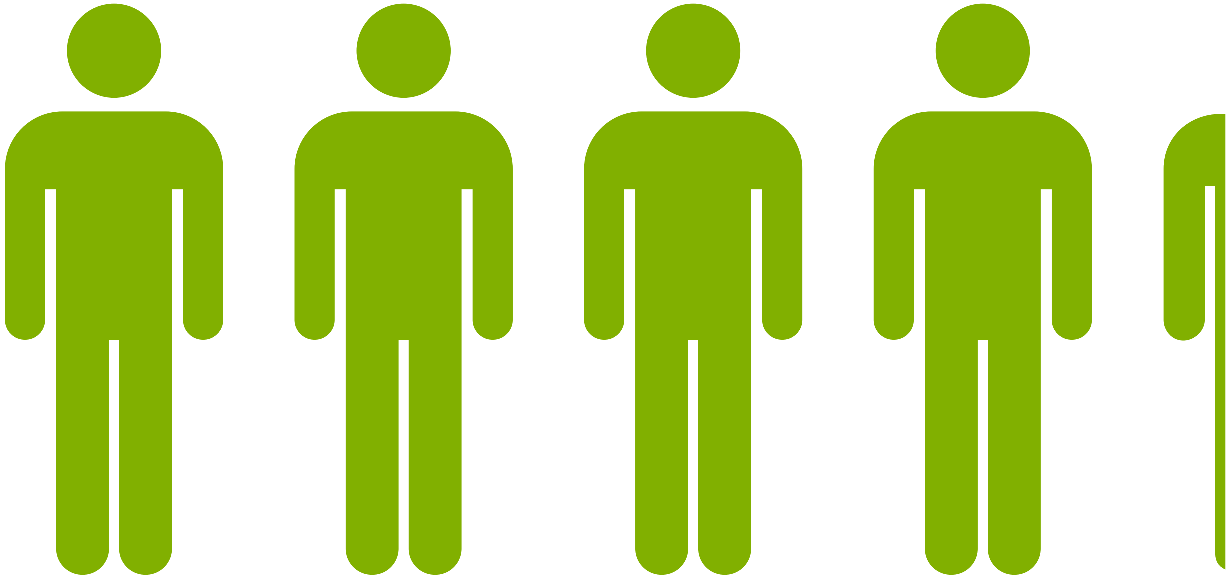
05. DO YOU **TIER** YOUR REFERENCE CUSTOMERS, OR ARE THEY TREATED EQUALLY?

Analysis

- Whereas previous surveys had shown a majority in favour of tiering reference customers, the community is now split on this issue
- One respondent summed it up with "They're all heroes!" and another said "If they are in the reference programme, they are considered top tier for us as it'll be aligned to our business priorities"



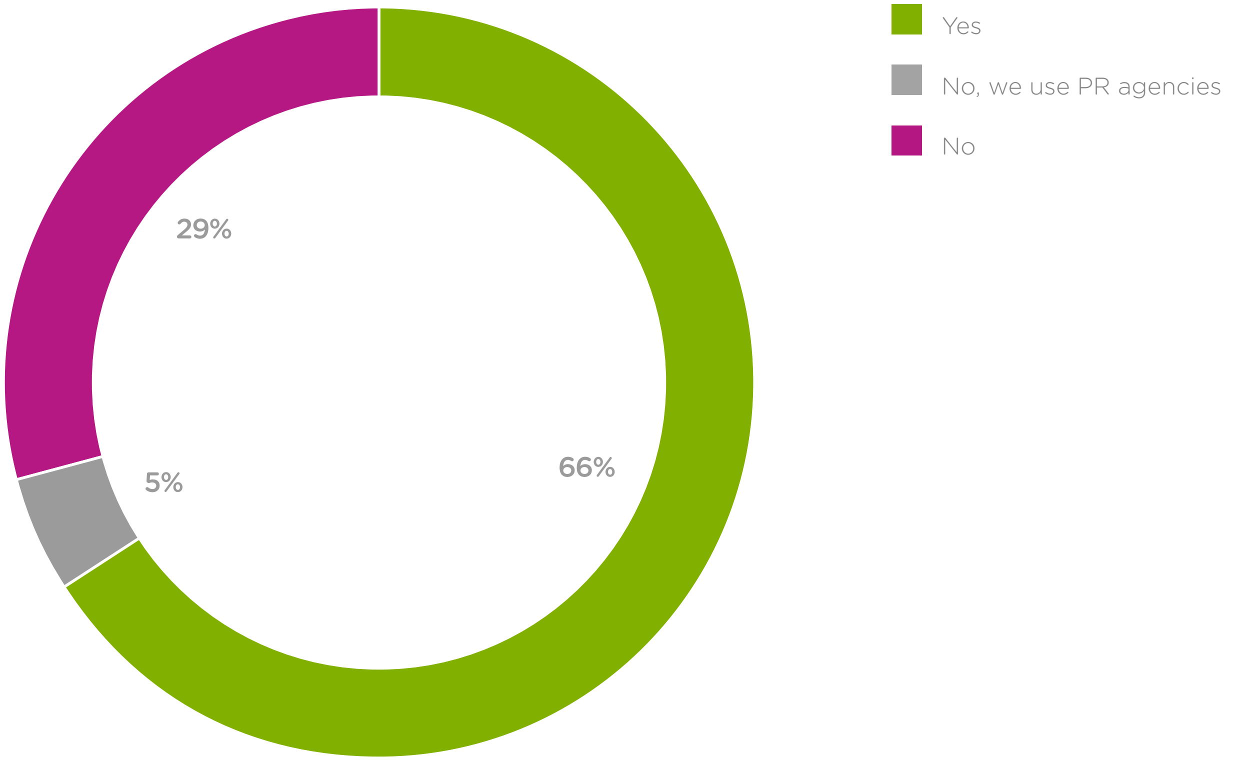
06. **HOW MANY** FTE STAFF DOES YOUR PROGRAMME HAVE (EXCLUDING AGENCY SUPPORT)?



Analysis

- The average number of FTE (full-time equivalent) advocacy marketing managers is 4.2

07. DO YOU USE **SPECIALIST** CUSTOMER REFERENCE/ADVOCACY **AGENCIES** TO SUPPORT YOUR PROGRAMME?



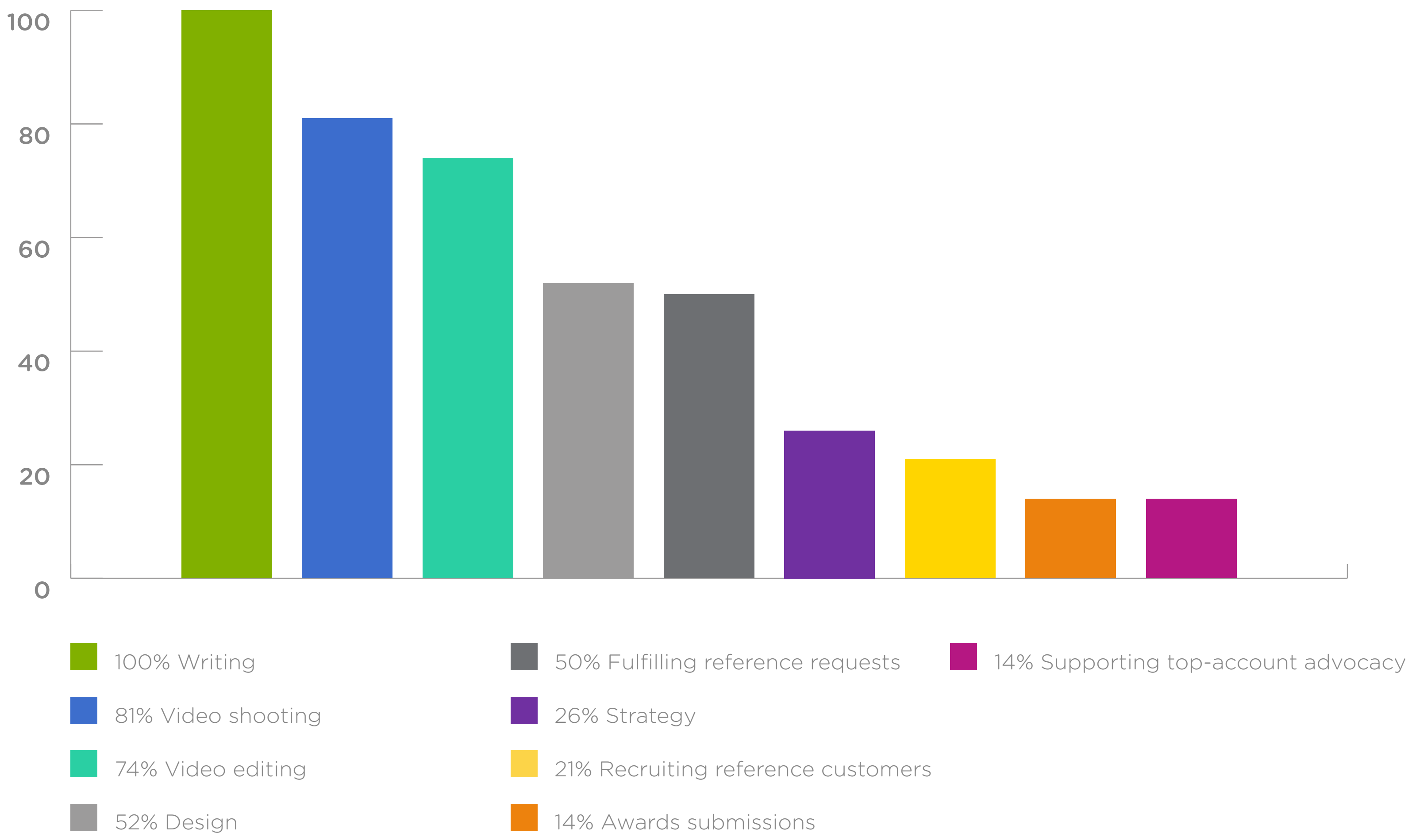
Analysis

- Two thirds of respondents use specialist customer reference/advocacy agencies to support their programme
- A small percentage (4.6%) use public relations consultancies

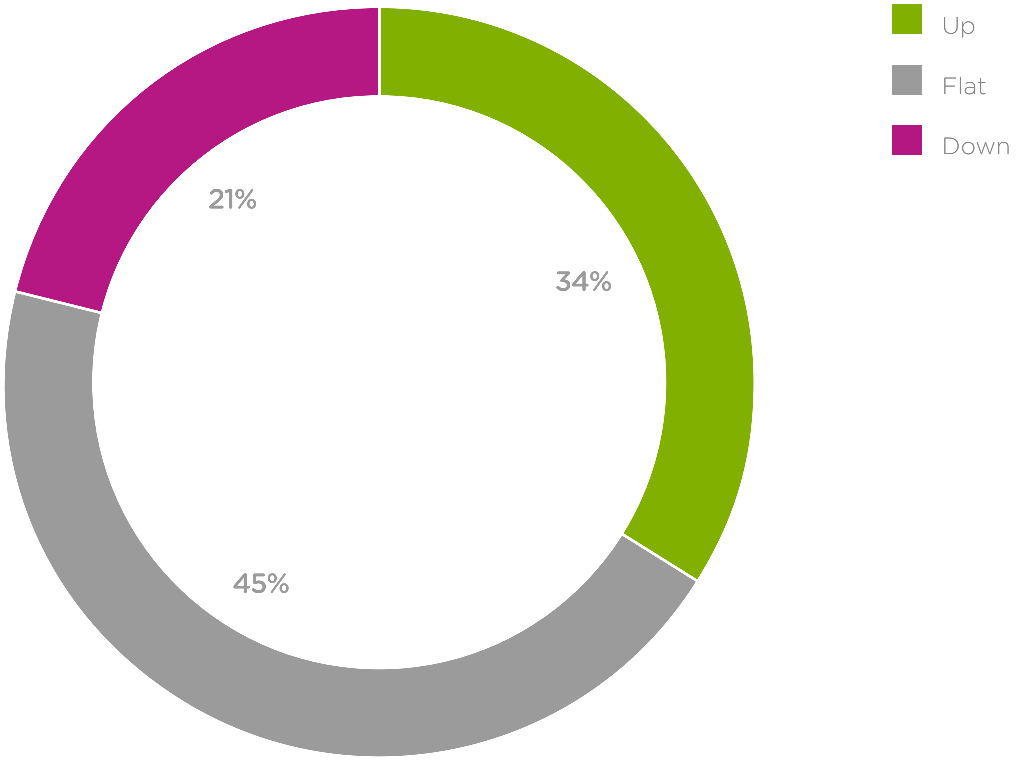
08. IN WHICH AREAS DO YOUR AGENCIES ASSIST YOUR PROGRAMME?

Analysis

- It comes as no surprise to see writing as the top area in which agencies support programmes. Every respondent using external consultancies said that they use the agency for writing
- Equally, programmes are using agencies for support with video shooting and editing. Around eight in ten programmes that use specialist reference agencies look for them to shoot videos



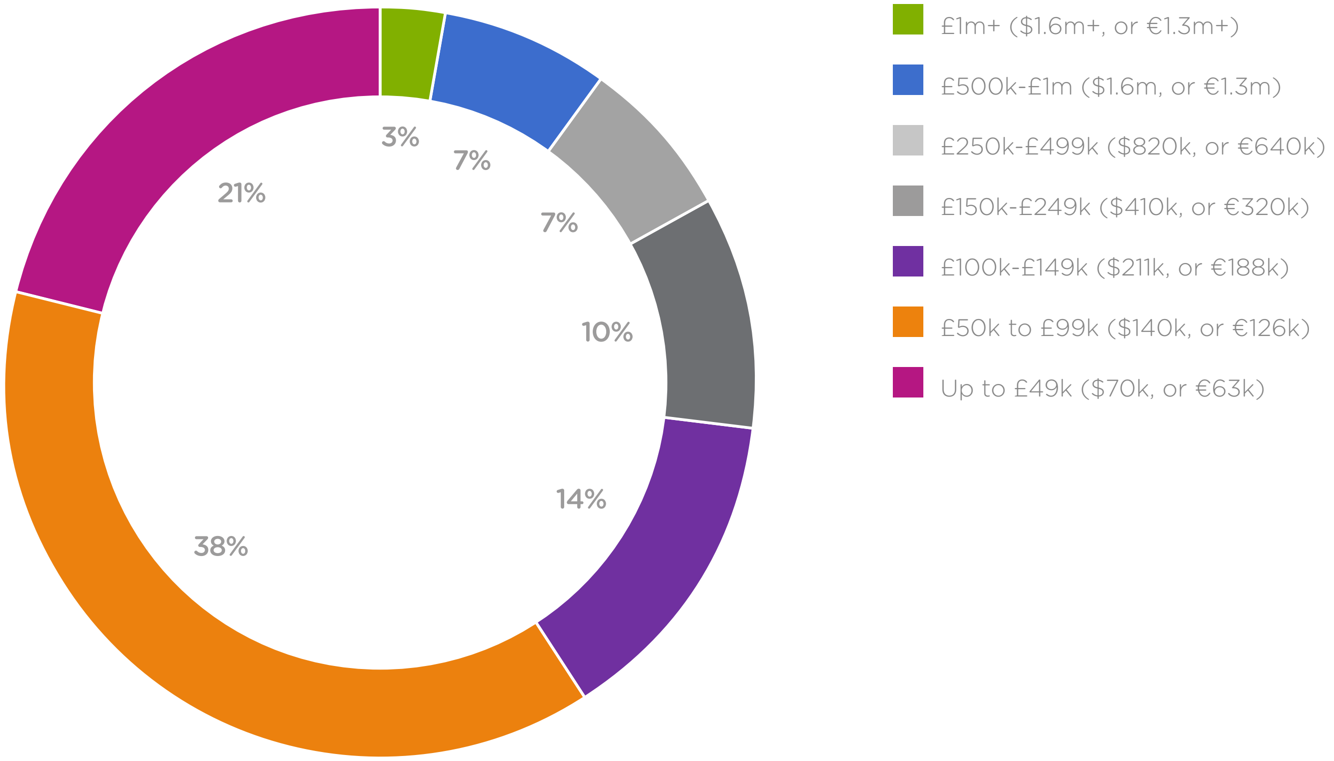
09. COMPARED TO 2015, IS YOUR PROGRAMME BUDGET UP, FLAT OR DOWN?



Analysis

- 79% are spending the same if not more than in 2015

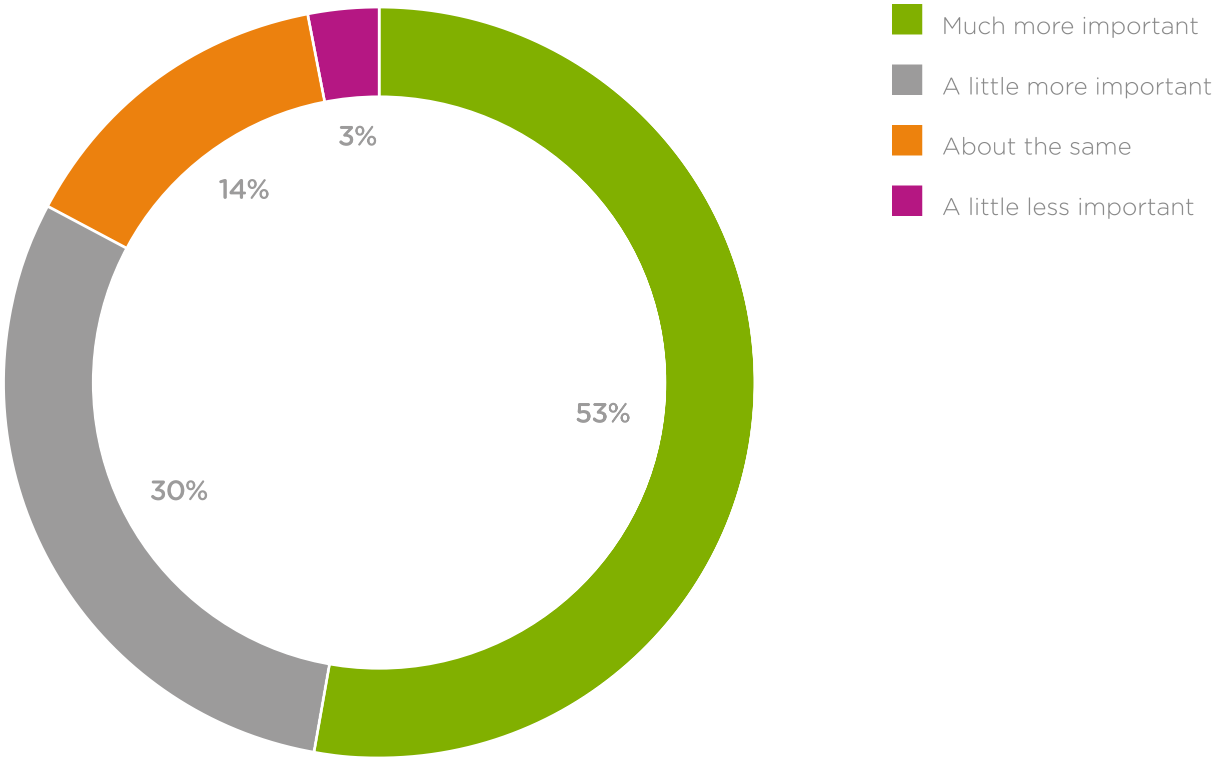
10. WHAT IS YOUR CURRENT ANNUAL LEVEL OF **INVESTMENT** IN YOUR CUSTOMER REFERENCE/ ADVOCACY PROGRAMME, EXCLUDING PEOPLE?



Analysis

- 73% of respondents operate on a customer advocacy budget up to £149k
- 10% spend between £150k and £249k, with a further 14% spending between £250k - £1m

11. COMPARED TO TWO YEARS AGO, HOW IS YOUR PROGRAMME PERCEIVED INTERNALLY?



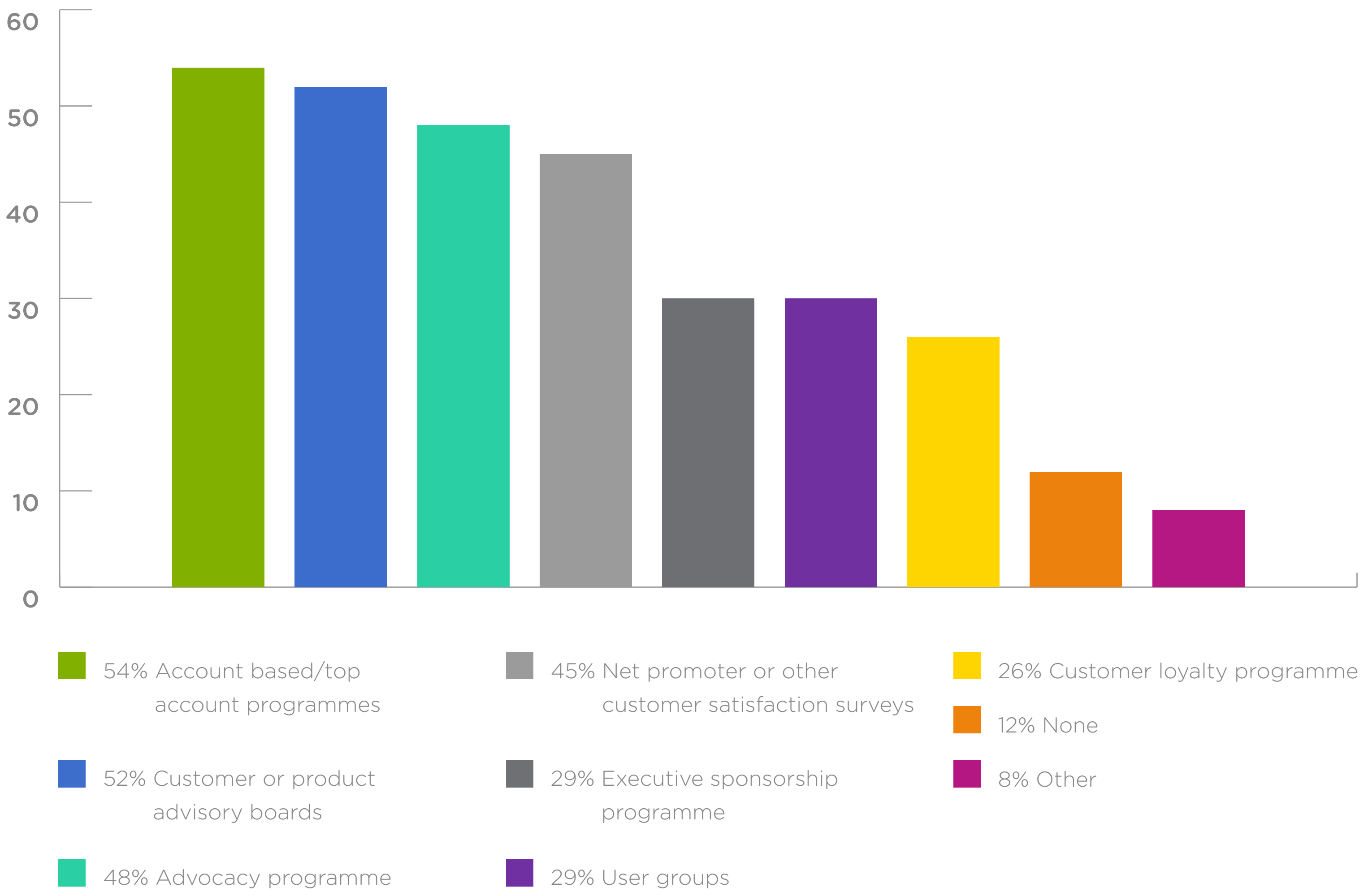
Analysis

- The vast majority of respondents (82.8%) say that reference/advocacy programmes are perceived as being more important within their organisations

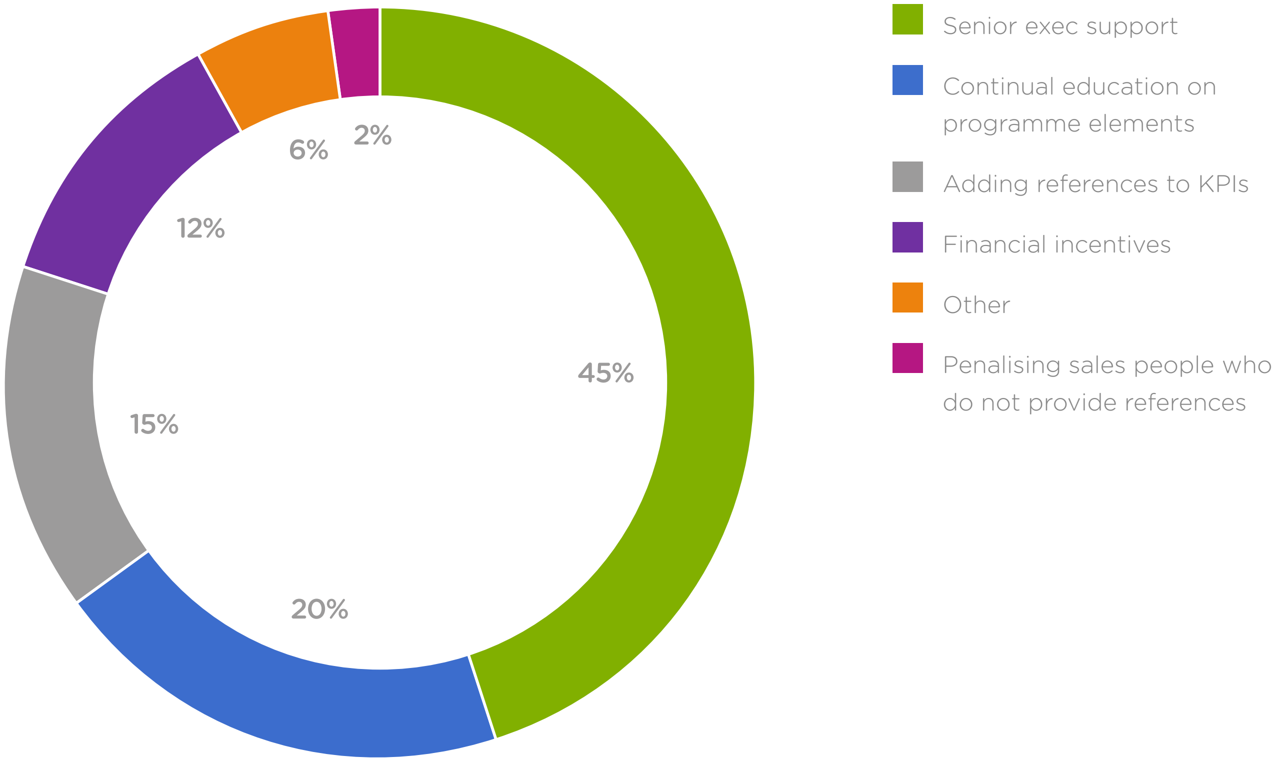
12. WITH WHICH OTHER PROGRAMMES DOES YOUR CUSTOMER REFERENCE PROGRAMME **INTEGRATE**?

Analysis

- There have been some significant changes in the last 12 months. The most notable is the increased integration of account-based/top account programmes (54% compared to 31% last year)
- More than half of reference programmes now integrate with customer or product advisory boards compared to 39% last year
- And there has been a big increase in the number of reference programmes linked to net promoter or other customer satisfaction surveys (45% compared to 27%)



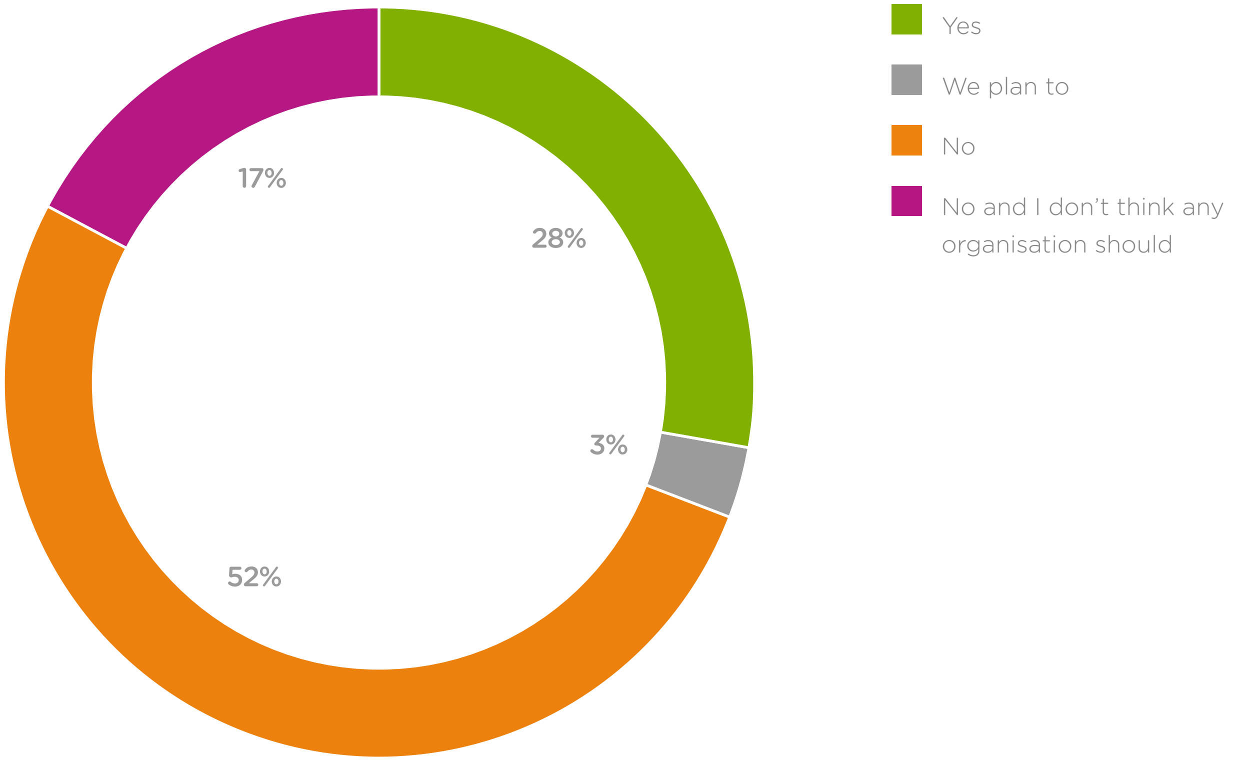
13. WHAT'S THE BEST METHOD FOR ENGAGING **INTERNAL EMPLOYEES** TO PROVIDE POTENTIAL REFERENCE CUSTOMERS?



Analysis

- Senior exec support continues to be ranked as the best way to engage internal employees. In 2015, 42% said it was the best method and this has remained constant
- As in 2015, continued education on programme elements came a strong second with 20% considering the best method
- While, overall, financial incentives are among the least popular methods of engaging internal employees, three times as many respondents consider them to be the best compared to 2015 (12% vs 4%)

14. DO YOU INCENTIVISE YOUR **SALES FORCE** TO PARTICIPATE IN REFERENCE ACTIVITIES?



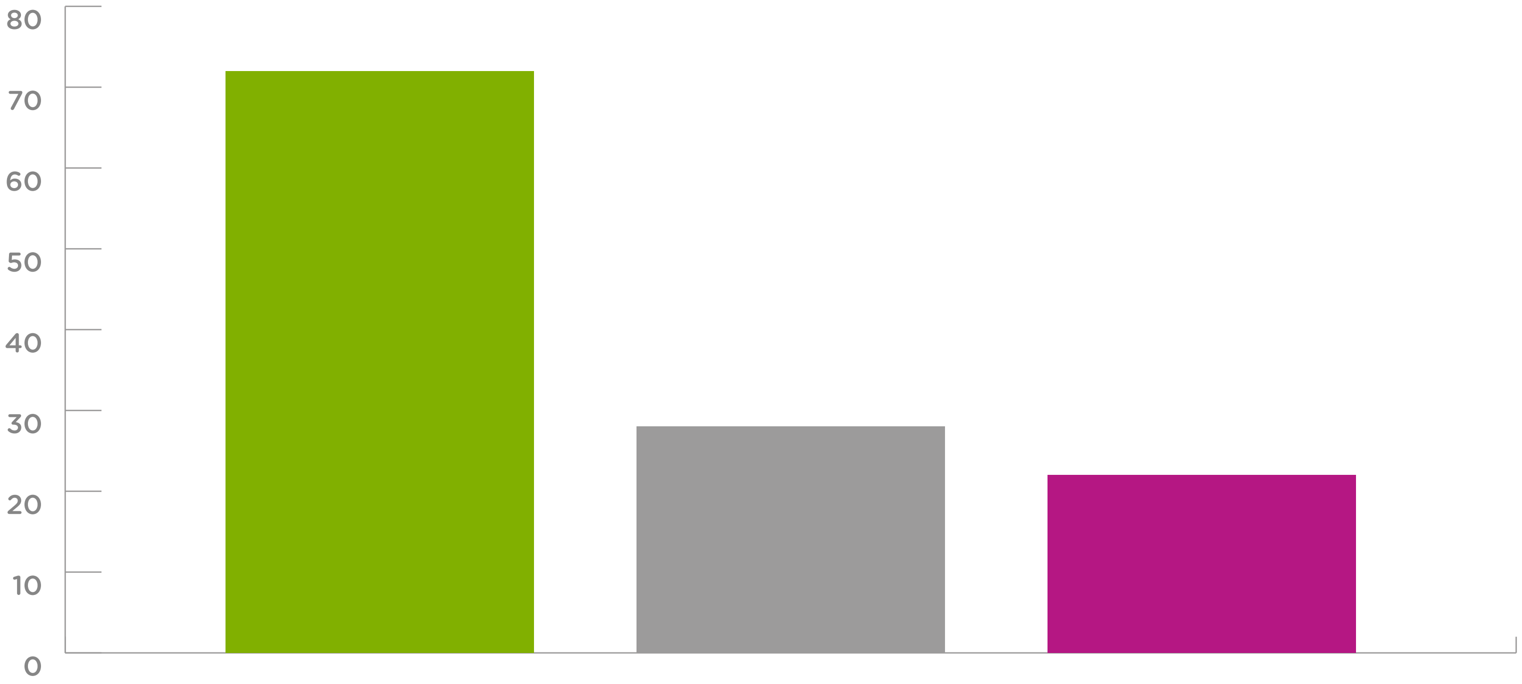
Analysis

- During the last year, there has been a significant increase in the percentage of respondents saying that they do not incentivise the sales force to participate in reference activities (68% in 2016, compared to 55% in 2015)
- The percentage of respondents saying that they either incentivise the sales team or plan to is 31%

15. WHICH METHODS DO YOU USE TO INCENTIVISE YOUR **SALES FORCE** TO PARTICIPATE IN REFERENCE ACTIVITIES?

Analysis

- Financial incentives dominate the rewarding method to engage sales participation (72%)

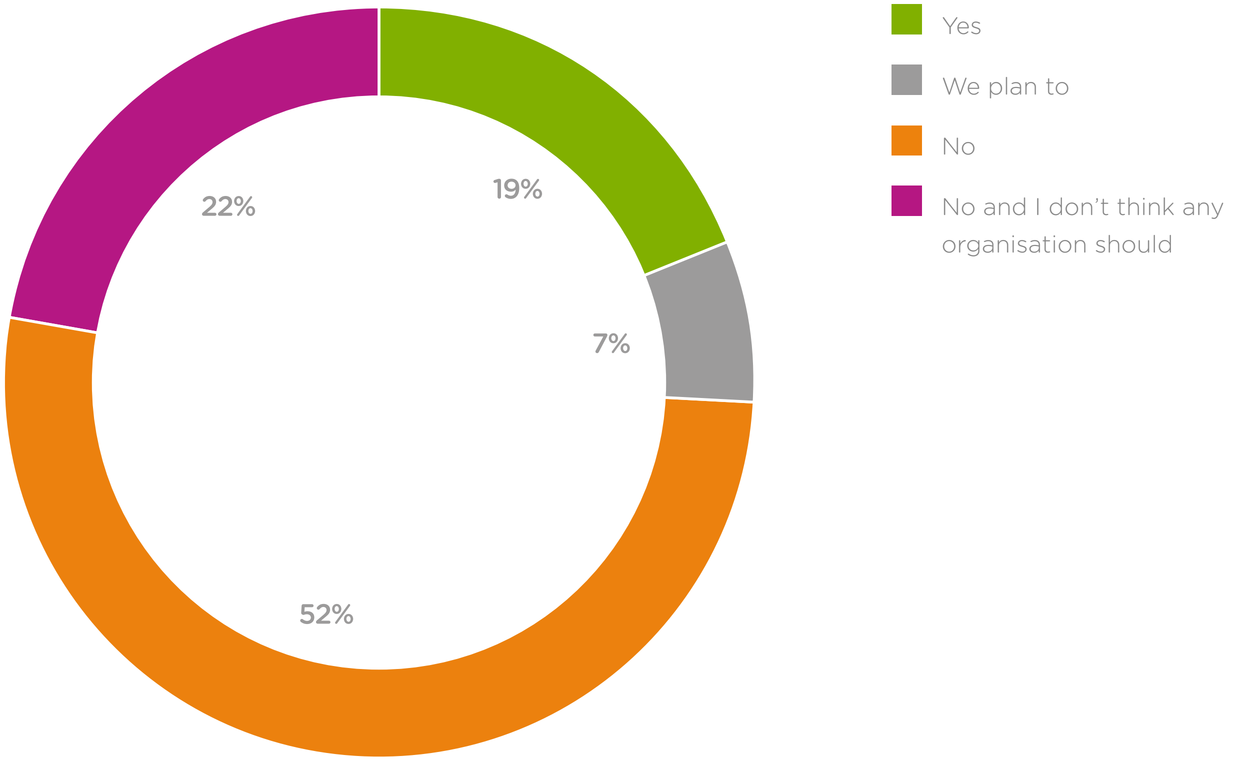


72% We give financial incentives

28% We give other non-financial incentives

22% We offer points that can be redeemed for rewards

16. DO YOU INCENTIVISE YOUR **CUSTOMERS** TO PARTICIPATE IN REFERENCE ACTIVITIES?



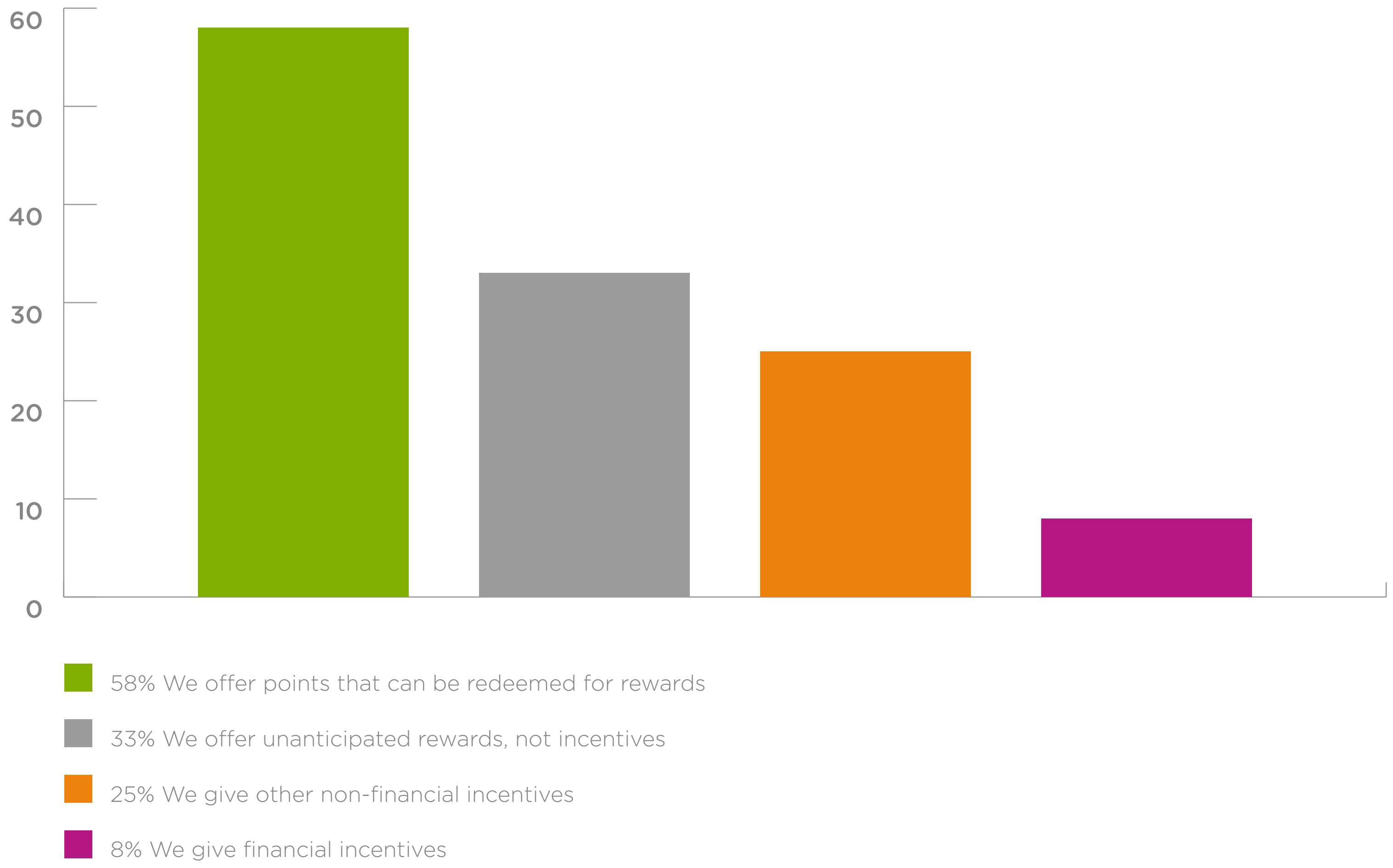
Analysis

- Almost three in four respondents (74%) said that they do not incentivise customers to participate in reference activities
- Over a quarter (26%) of respondents currently incentivise customers or a planning to do so

17. WHICH METHODS DO YOU USE TO INCENTIVISE YOUR **CUSTOMERS** TO PARTICIPATE IN REFERENCE ACTIVITIES?

Analysis

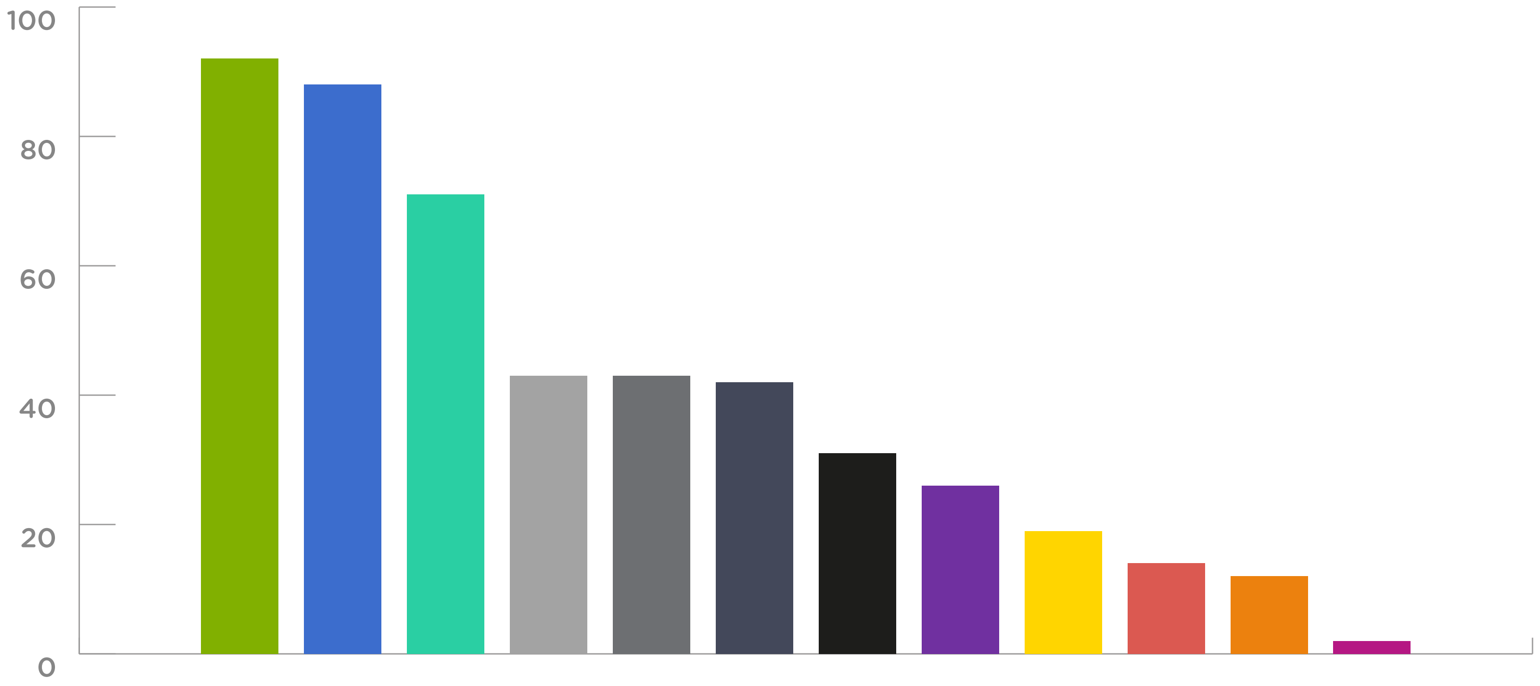
- Non-financial incentives make up the majority of all customer incentive activities



18. WHICH **TYPES** OF CUSTOMER STORY ASSETS ARE YOU CREATING?

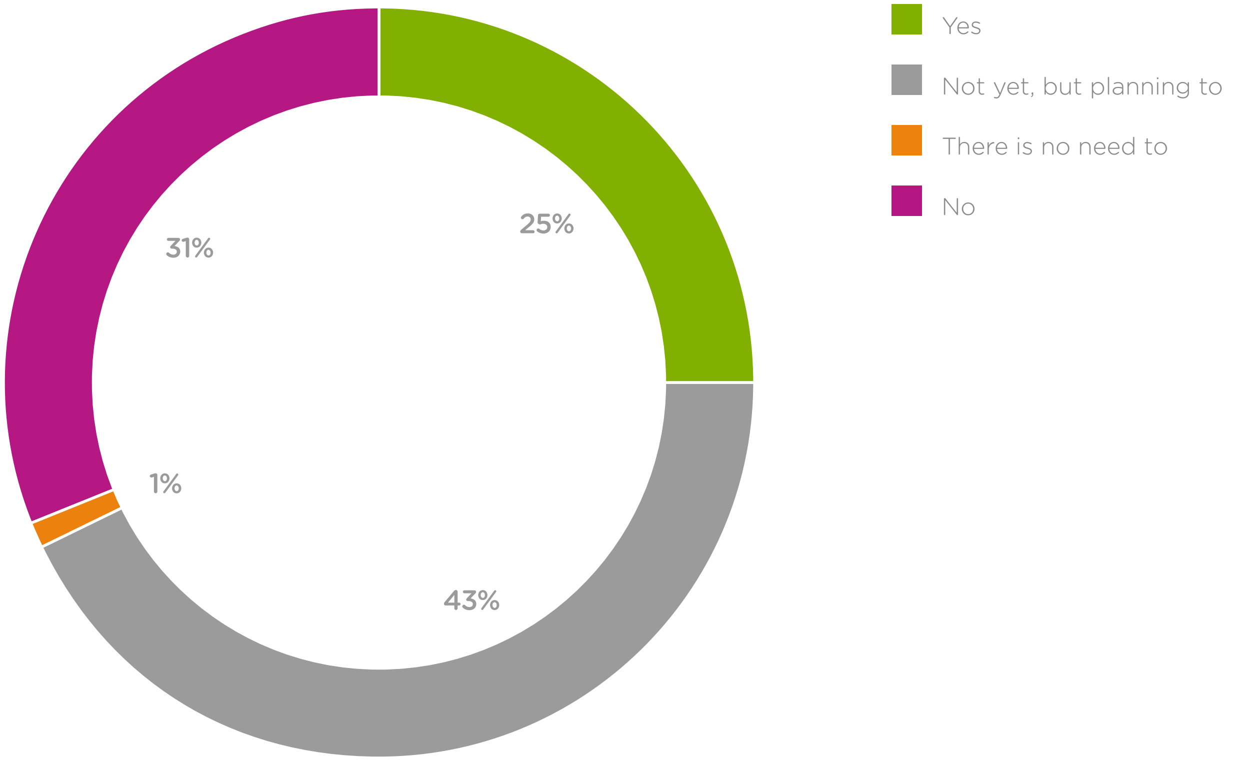
Analysis

- While PDF case studies remain the number one reference assets, produced by 92% of programmes, videos are continuing to become ever more popular and are produced by nearly as many respondents (88%)
- Infographics, social media images and collections of stories by industry sector are also popular
- However, the popularity of audio podcasts has plummeted. Only 14% of respondents are producing them for their programmes whereas this figure stood at 48% in our 2014 survey



92% PDF case studies
88% Video case studies
71% PPT/Keynote slides
43% Social Media
43% Infographics
42% Industry credentials
31% Interactive PDFs/SnapShots
26% Whitepapers
19% eStudies
14% Audio / podcasts
12% Deep ROI case studies
2% Other

19. ARE YOU OPTIMISING YOUR CUSTOMER STORIES FOR **MOBILE**?



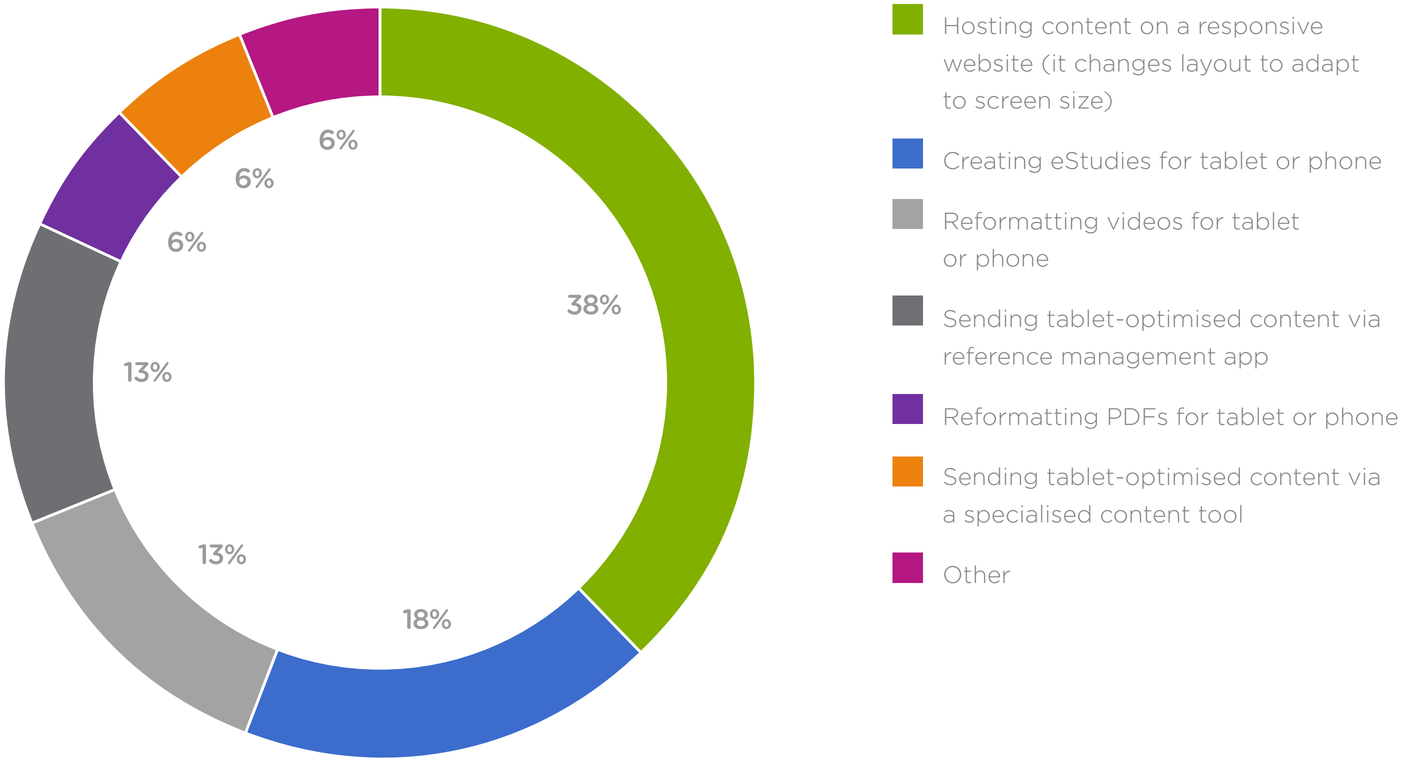
Analysis

- 68% of responders are either optimising customer stories for mobile, or plan to
- While 31% of responders said ‘no’, only 1% said that they do not see the need for mobile optimisation

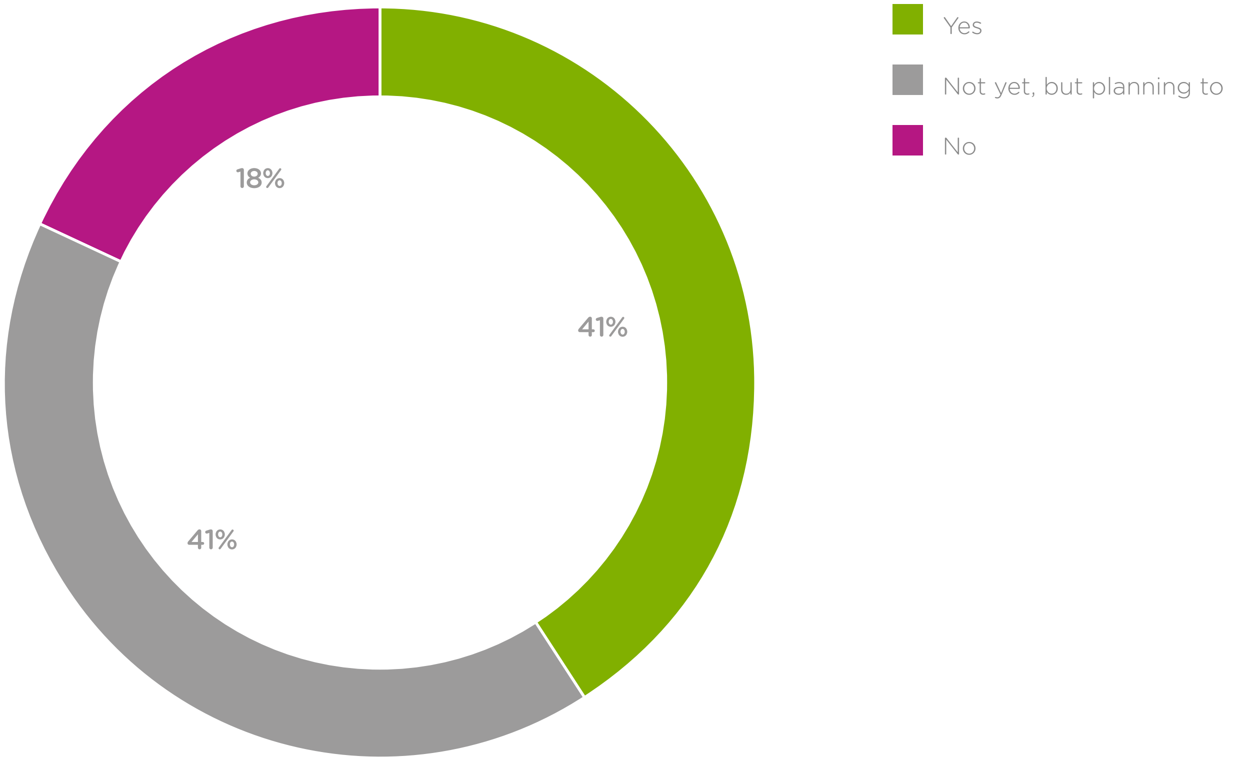
20. WHICH METHODS DO YOU USE TO OPTIMISE YOUR CUSTOMER STORIES FOR **MOBILE**?

Analysis

- Hosting content on a responsive website (38%) is the most popular method of optimising case studies for mobile devices
- 19% of those optimising content create eStudies for tablet or phone. This is the second most popular method



21. ARE YOU OPTIMISING YOUR **WRITTEN** CUSTOMER STORIES FOR **SOCIAL** SHARING?



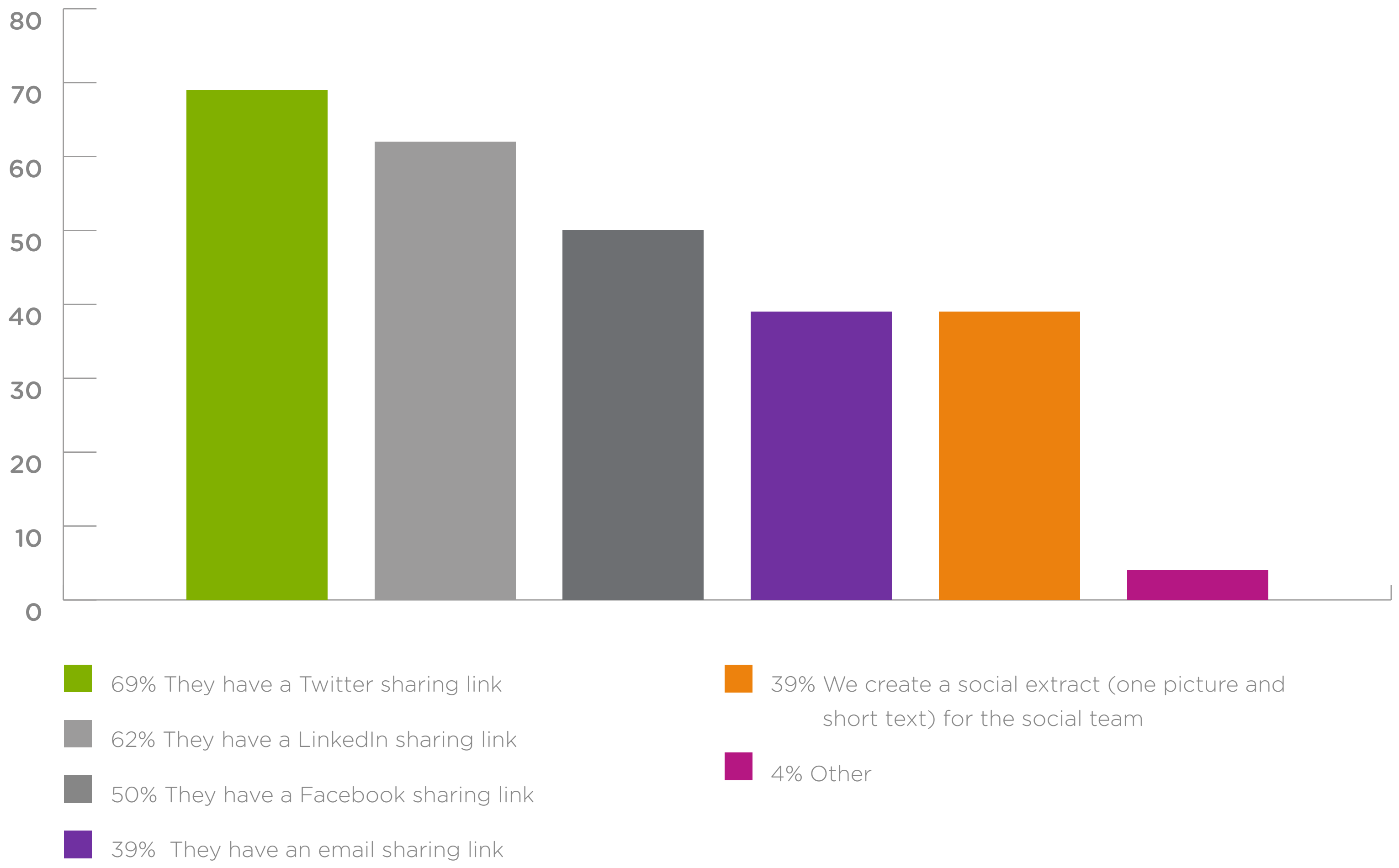
Analysis

- Social media has been embraced by reference professionals. 83% of respondents said that they are either optimising customer stories already (41%) or planning to do so (41%)
- Incorporating a Twitter sharing link was the most popular way to optimise stories (69%)

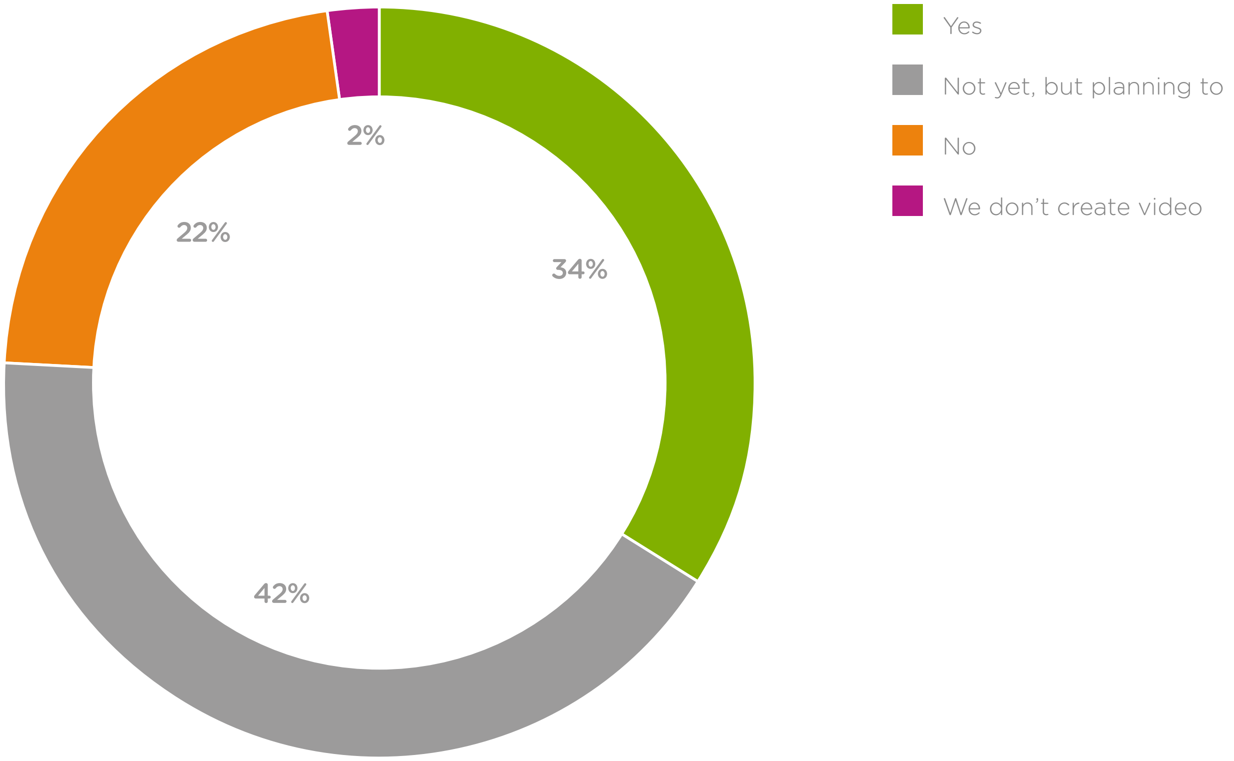
22. WHICH METHODS ARE YOU USING TO OPTIMISE YOUR **WRITTEN** CUSTOMER STORIES FOR **SOCIAL** SHARING?

Analysis

- More companies than ever are taking to social media to promote customer content
- We expect to see an evolving social strategy over the next 12 months



23. ARE YOU OPTIMISING YOUR **VIDEO** CUSTOMER STORIES FOR **SOCIAL** SHARING?



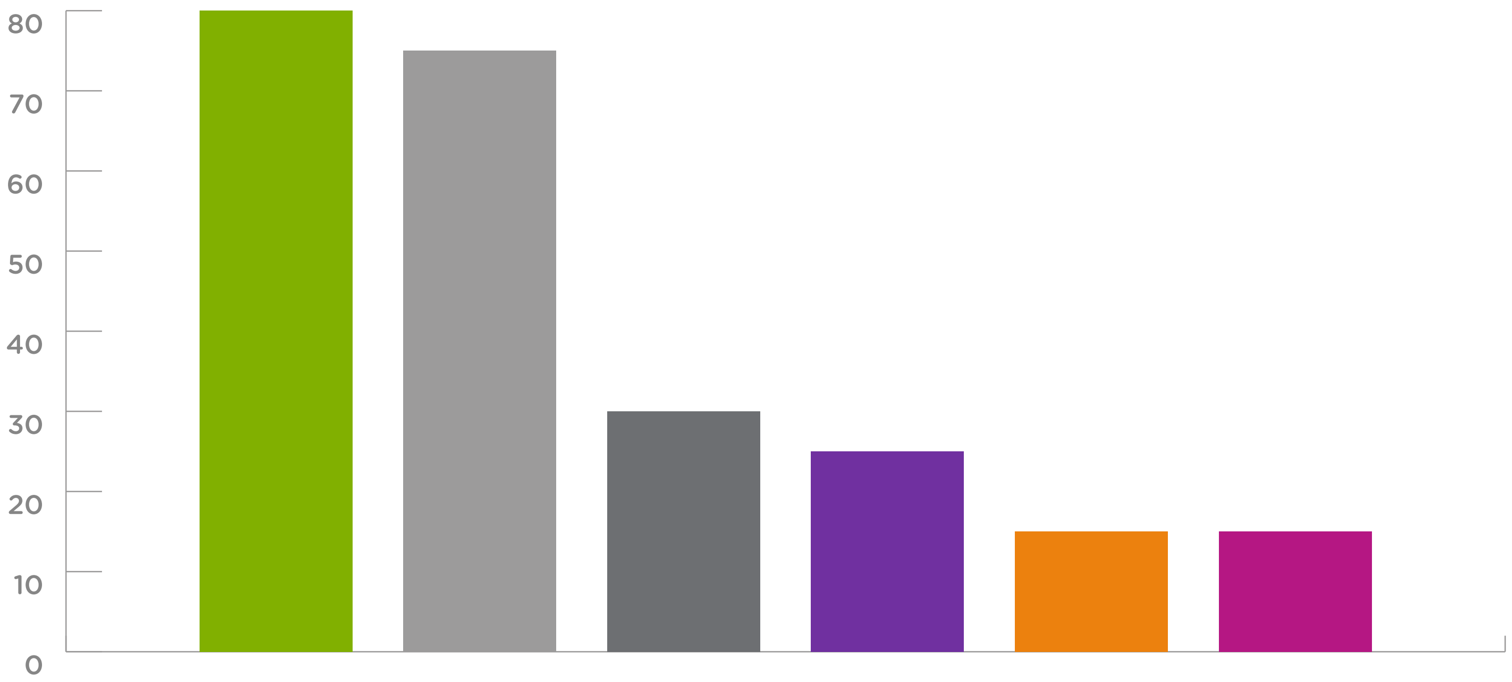
Analysis

- Three in four respondents are either already optimising video customer stories for social sharing (34%) or they are planning to do so (42%)
- Again, Twitter is the primary focus, with 80% of those optimising video stories for social media choosing to create short edits for the networking service
- Facebook came a close second (75%) while there is much less appetite for Instagram (30%) or Vimeo (15%)

24. WHICH METHODS ARE YOU USING TO OPTIMISE YOUR **VIDEO** CUSTOMER STORIES FOR **SOCIAL** SHARING?

Analysis

- Creating short consumable content for social channels is clearly the major trend
- Only 25% are using closed captions. Given that videos now run muted on most social platforms this means that 50% of the message is being lost



80% Creating short edits for Twitter

75% Creating short edits for Facebook

30% Creating short edits for Instagram

25% We add closed captions to our videos (so they work when muted)

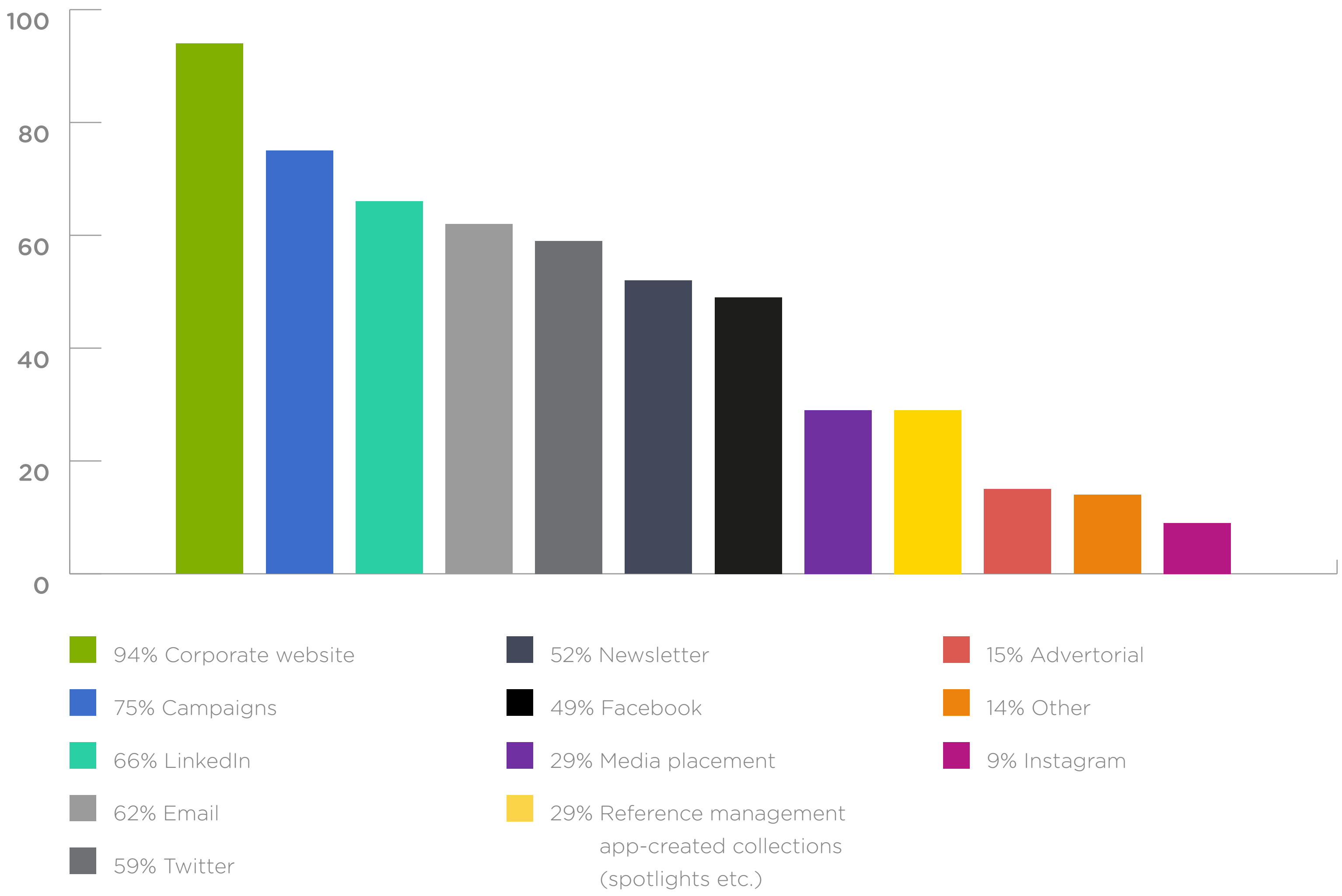
15% Creating short edits for Vimeo

15% We split our video stories into multiple episodes (InstaMiniSeries)

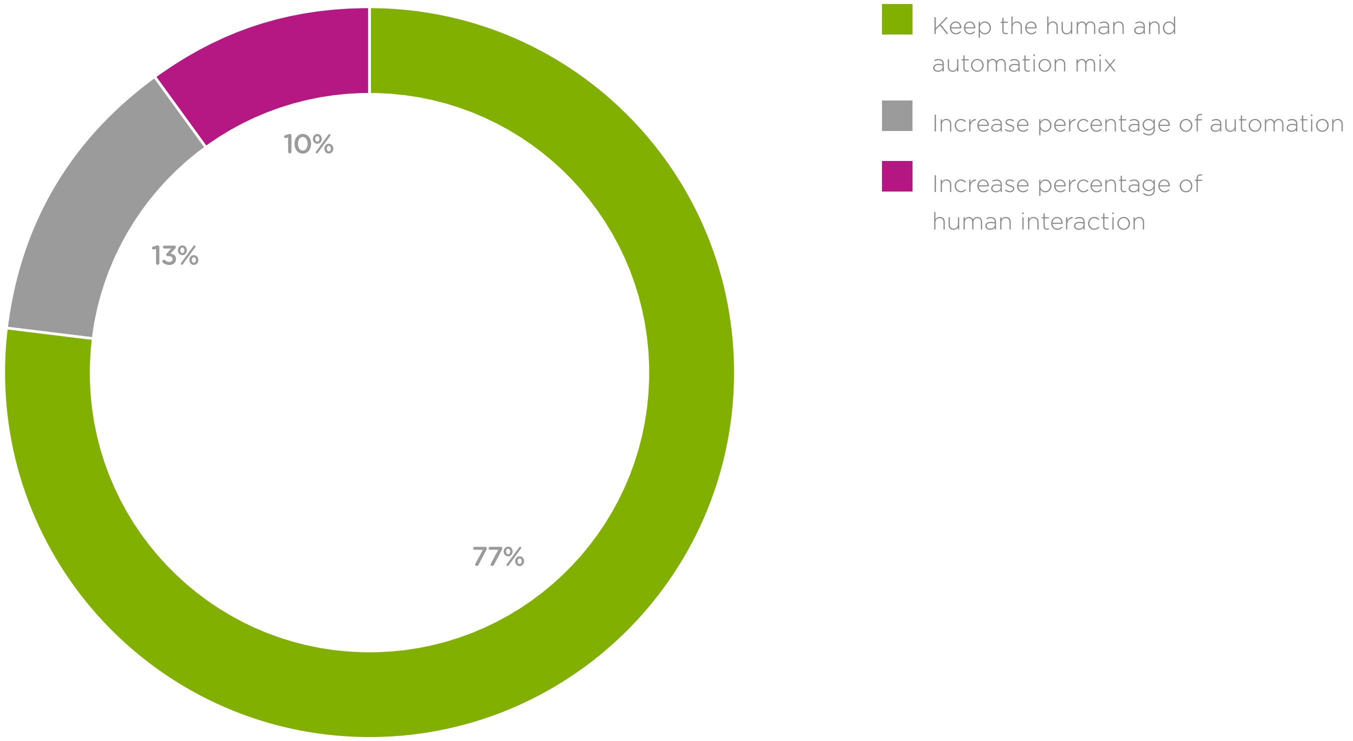
25. WHICH **CHANNELS** DO YOU USE TO PROMOTE YOUR CUSTOMER STORIES?

Analysis

- Digital channels continue to dominate the promotion of customer stories
- The corporate website remains the go to location for promoting customer stories (94%). LinkedIn (66%), Twitter (59%) & Facebook (49%) are the most popular social channels



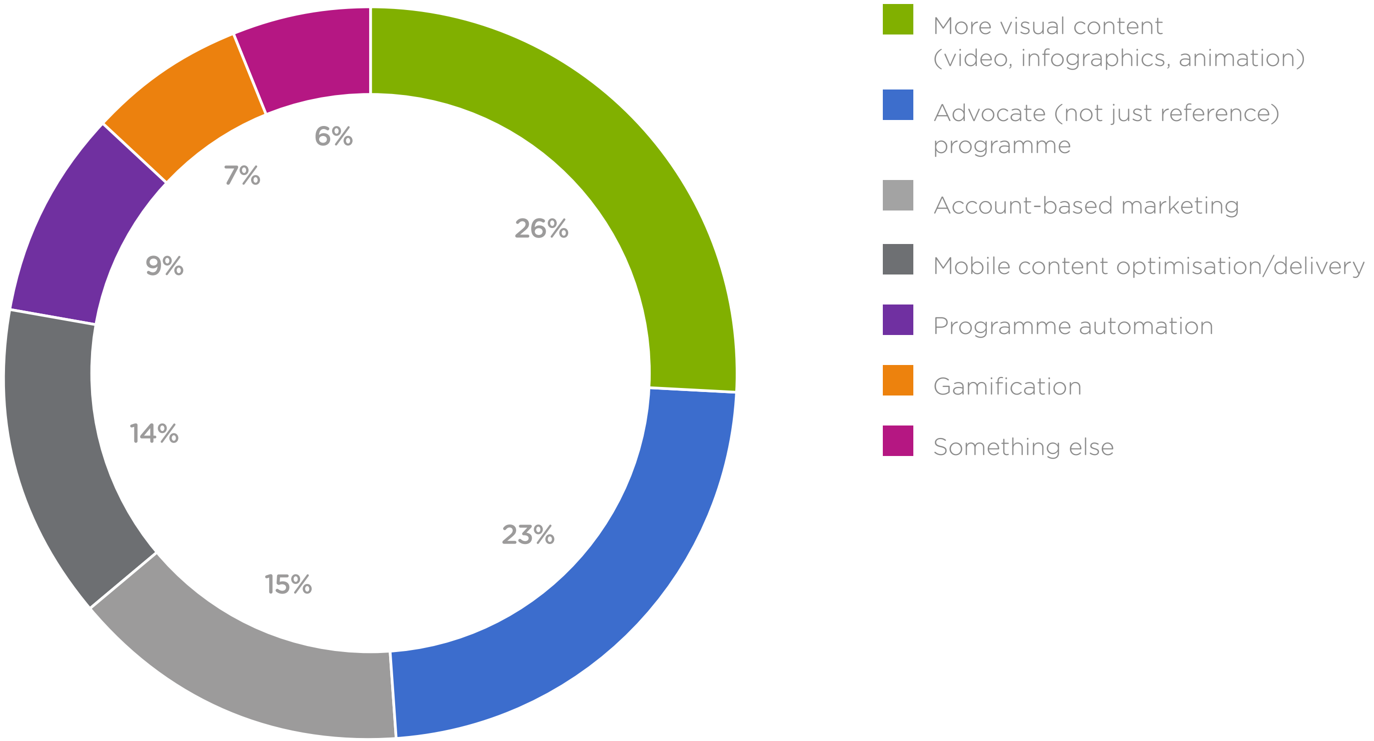
26. WHAT ARE YOUR PLANS FOR **AUTOMATION** VS **HUMANS**?



Analysis

- 77% of respondents plan to keep their mix of human and automation consistent. We expect to see no significant shifts towards automation (13%) or human (10%) with each focus cancelling each other out

27. RANK YOUR **TOP THREE FOCUS AREAS** FOR NEXT YEAR IN ORDER, WITH YOUR TOP PRIORITY FIRST



Analysis

- Producing more visual content takes the top spot this year for programme priorities. This is even more important as the general trend for video consumption grows and social media algorithms prioritise video content
- Account-based marketing moves into third place this year as more advocacy professionals start to understand the innate connection between the two disciplines

CONTACT US

+44 1625 500 800

advocacy@inevidencecrp.com