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2024 ADVOCATE MARKETING GLOBAL SURVEY

WELCOME

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contents

2024 - We have lift-off!

We boldly go into 2024 following a year of business turmoil and global unrest; full of hope for stability and peace.

You'll notice a space theme[1] to this edition of the survey (it is global, after all); reminding us that our blue planet is so small, and our advocate marketing community microscopic, so it's probably a good plan to look out for one another.

Hopefully there is something useful here to assist you with your program and professional development in 2024.

If you'd like any more information about topics covered in this survey please contact us.

Enjoy!

About the survey

The 2024 edition of the advocate marketing global survey continues the quest to better understand the current state of the advocate marketing profession, specifically customer reference and advocacy programs.

It also aims to identify new trends, key challenges and best practices, and then to share the information freely and impartially for the benefit of the community.

As with Advocate Marketing Academy, this survey is proudly powered by inEvidence.

Methodology

This survey was carried out using an online survey tool; the number of questions deliberately limited to:

a) respect everyone's time, and b) encourage a statistically valid number of responses.

The survey was opened more than 400 times; responses were then checked to ensure they were complete and from people working in the industry. This resulted in more than 150 usable, verified responses, of which 105 were complete. They came from 22 countries, across four regions.

For most questions we have used the data on an individual reference/advocacy pro level; when the question demanded it, for statistical validity (budget, apps used, etc), we've used the data on a program level.

[1] specifically NASA's Artemis program

EXECUTIVE SUMMARY

three things you need to know

1. The year of the great reset

Just as 2022 was the year of large, positive growth for customer advocacy, 2023 was a year of turmoil.

With 27% of companies reporting reduced budgets, and only 16% with an increase (half the number from 2022), being one of the 57% holding a flat budget was the norm; albeit in a time of double-digit inflation.

80% of responders state their programs are viewed as more important than 24 months prior, however this is down from 91%, the worst ever result.

It's the same story from a resourcing perspective, apart from companies of $1B to $10B in size, all other segments are down by an average of one to three FTEs. Unsurprisingly, specialist and flexible agency skill is more in demand than ever.

It's sobering reading, yet there are signs the reset has occurred and 2024 will have far more opportunity.

2. Alignment - still the largest focus

Program alignment is key; hardly surprising when one considers needs and complexity of marketing in 2024.

On <u>average</u>, programs now:

- Recruit advocates from five sources
- Use four dedicated mar-tech tools
- Create eight story asset types
- Use ten comms channels to promote stories
- Report on nine metrics, inc. business impact

As well as at an organizational level, much of this alignment involves technical integrations, with capacity to create both opportunity and intricacy.

It's therefore not surprising to see an increase in the tiering of advocates. Alignment is set to continue as a focus throughout 2024.

3. Diversity: progress or delusion?

On the face of it, this edition of the survey shows clear positive movement in respect to diversity in customer advocacy.

Zero responders strongly agree there is a lack of diversity within customer stories, with varying degrees of agreement that stories DO represent diversity, totaling 51% up from 40% in 2022.

It's an almost identical opinion for varying degrees of agreement that customer advocacy is diverse, totaling 52% up from 41% in 2022.

Yet only 12% of programs measure advocate pool diversity (down from 16% in 2022), and result sentiment may not match lived experience.

Let's ensure progress is real in 2024, and not merely an increase in percentage of denial of a matter to be addressed. We have the power.

5 KEY TAKEAWAYS

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On average, Advocacy programs....

CREATE CUSTOMER STORIES IN

8

FORMATS

REDUCED HEADCOUNTS BY

2

FTEs

(DEPENDING ON ORG SIZE)

AMPLIFY STORIES VIA

10

CHANNELS

REPORT VIA

9

METRICS

SUPPORT REFERENCE REQUESTS

75% FULL SERVICE

25% SELF SERVICE


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2024

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2024 FOCUS

Q: what is your biggest focus for this year?

- Taken from free-text responses, the largest focus area by far is ‘integration’, meaning program integration, which follows anticipated trends
- Other major trends were:
  - Program awareness
  - Demonstrating program value
  - Increasing the number of stories
  - Staffing
  - Story amplification
  - Advocate recruitment
  - Creative and excellence in storytelling
  - Communities
  - Budget
  - Social assets
- Interestingly A.I. was just ONE of nearly 100 responses
- There seem to be a number of new programs launching this year; exciting!

PROFESSIONAL ACCREDITATION

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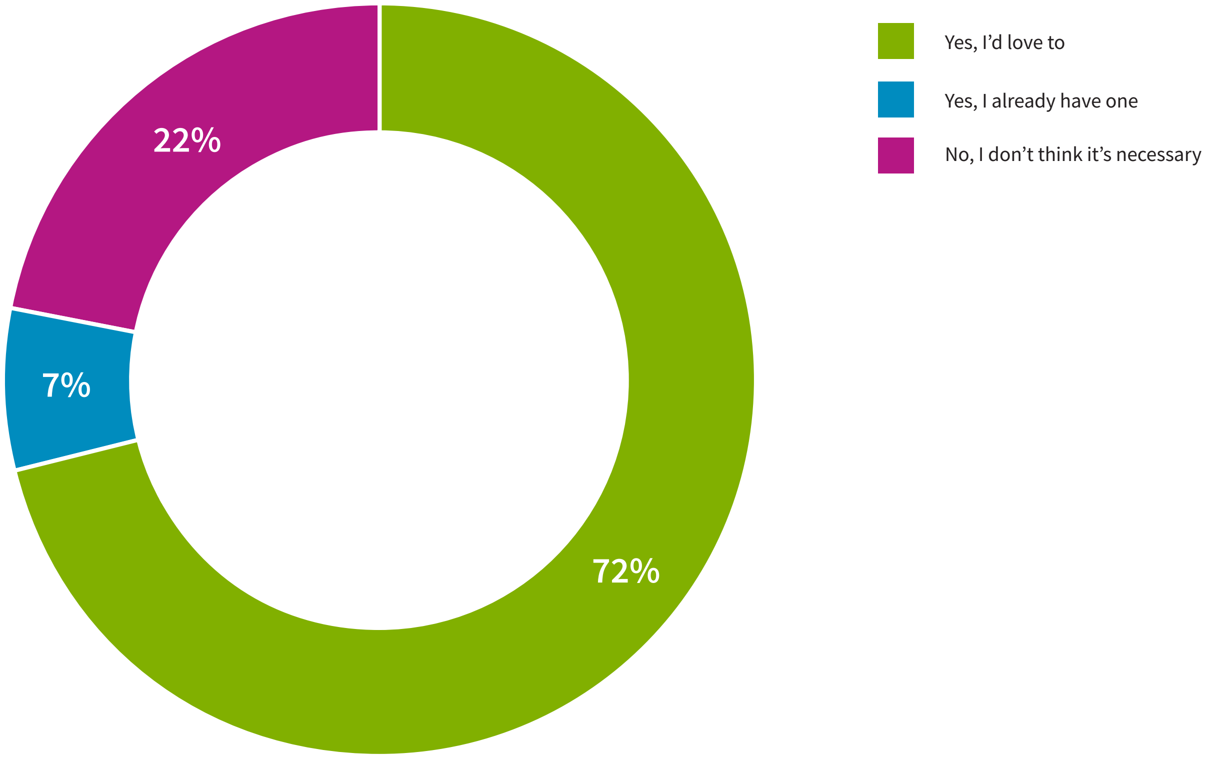
Q: would you like to achieve a globally-recognized, formal customer advocacy qualification?

- The last 24 months have seen more of a focus on accreditation, with more and more advocacy professionals achieving CCAP 1 and above. There are also new courses from CAP and the CMA, and more to come from the Academy, etc.
- Though there has been tangible movement (as a quick perusal of LinkedIn will demonstrate) this movement has not been represented in survey responses, with the results of this edition almost identical to those of 2022
- There is a mere 1% increase in those that now have a relevant qualification, almost three quarters would love to have one
- As always, this series of surveys and many other useful materials such as presentations, are available to the community, un-gated, in the Advocate Marketing Academy Knowledgebase



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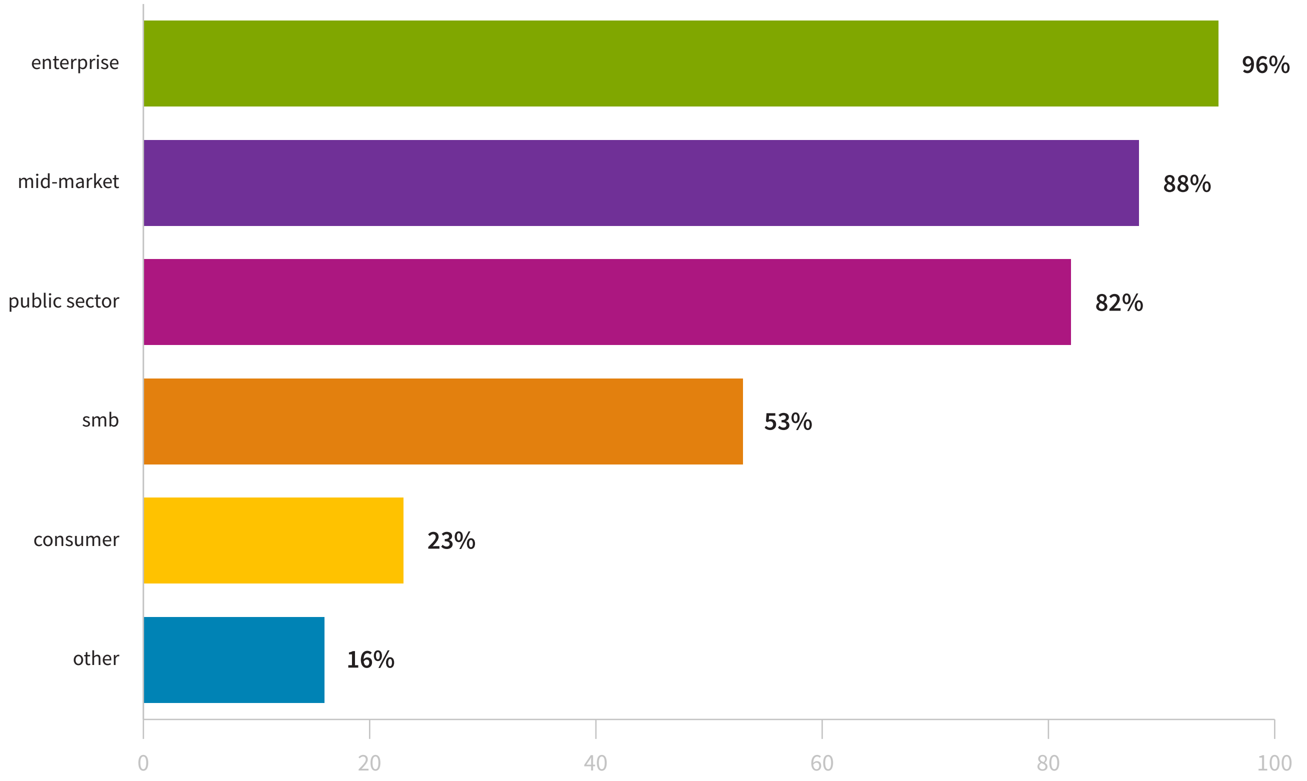
PROGRAM BASICS

INCREASED SEGMENT RESPONSIBILITY

Q: which customer segments does your program support?

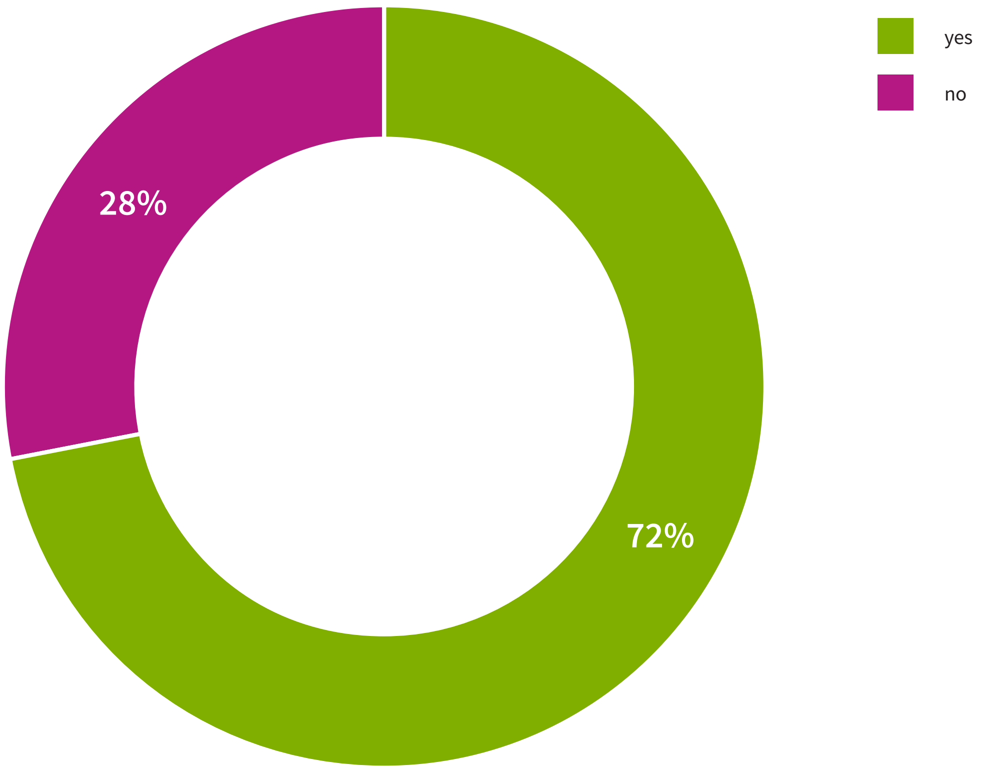
- Advocate marketers and their programs are responsible for an increasing number of segments every time we have a new edition of this survey
- It's now not all about mid-to-enterprise and public sector; smb may be down slightly on last year's survey but all other segments are static or show an increase
- 'Other' includes product marketing, industry marketing and ops



PARTNERS REMAIN ESSENTIAL

Q: does your program support partners as well as direct accounts?

- Down slightly in last year's edition, and back up this time, working with partners is still a clear focus for the majority of programs
- Especially with the strength of brand teams in some organizations (some of which would prefer if the customer was not involved!), adding the needs of partners into the mix is another level of complexity, but one that adds value all-round if handled correctly



PROGRAMS ARE COMFY IN MARKETING

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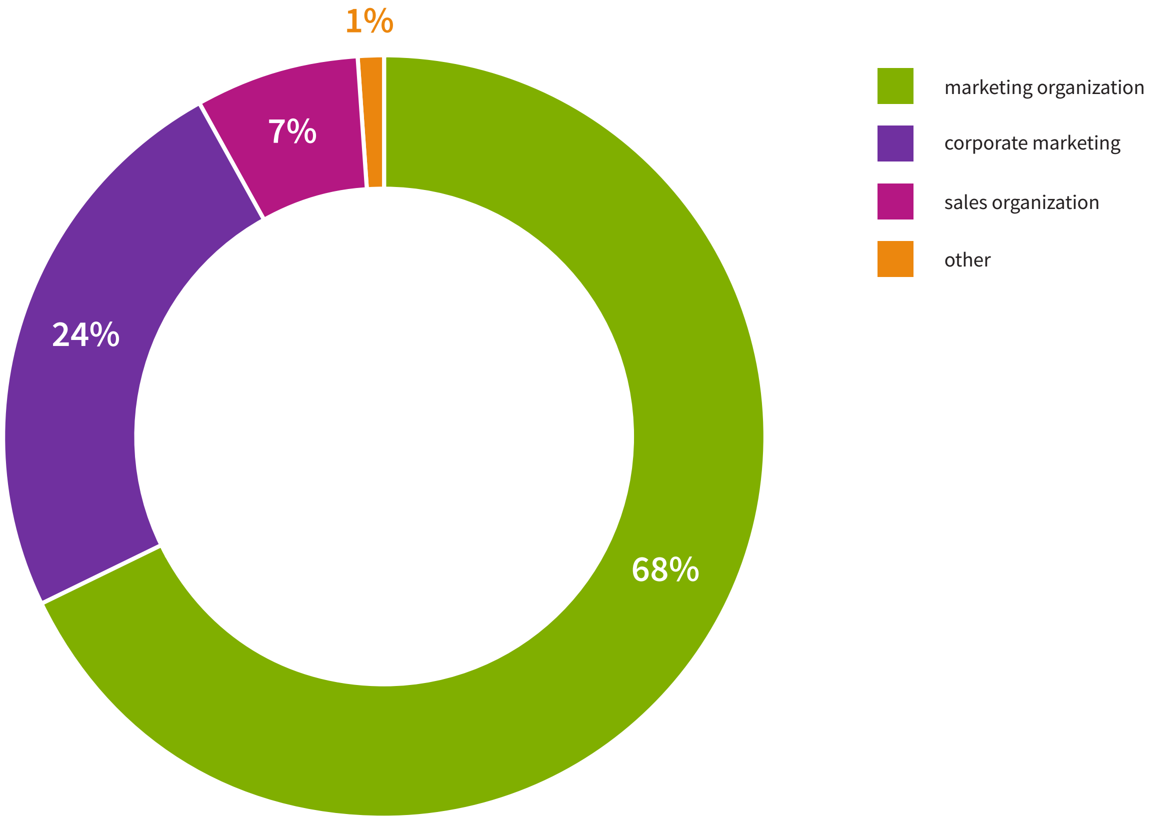
Q: where does your program sit within your organization?

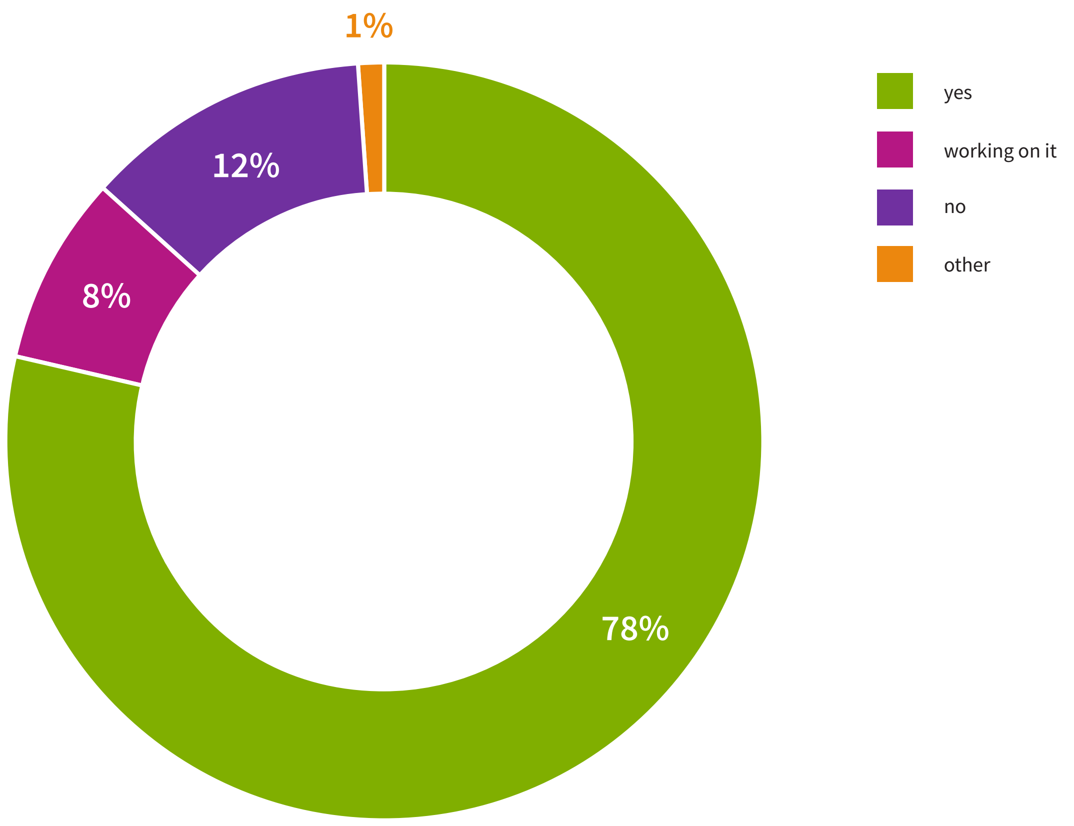
- Even though customer advocacy and evidence is the most effective influencer of purchase decisions, over two thirds of programs sit in the marketing organization and around a quarter sit in corporate/ brand. This has not changed materially since we began our surveys ten years ago
- What has changed is the percentage of programs that reside directly within in the sales org; seven percent may not be a huge number, yet it's the highest this has ever been



PROGRAM PROMOTION PROGRESS

Q: do you have a branded, external customer reference/advocacy program?

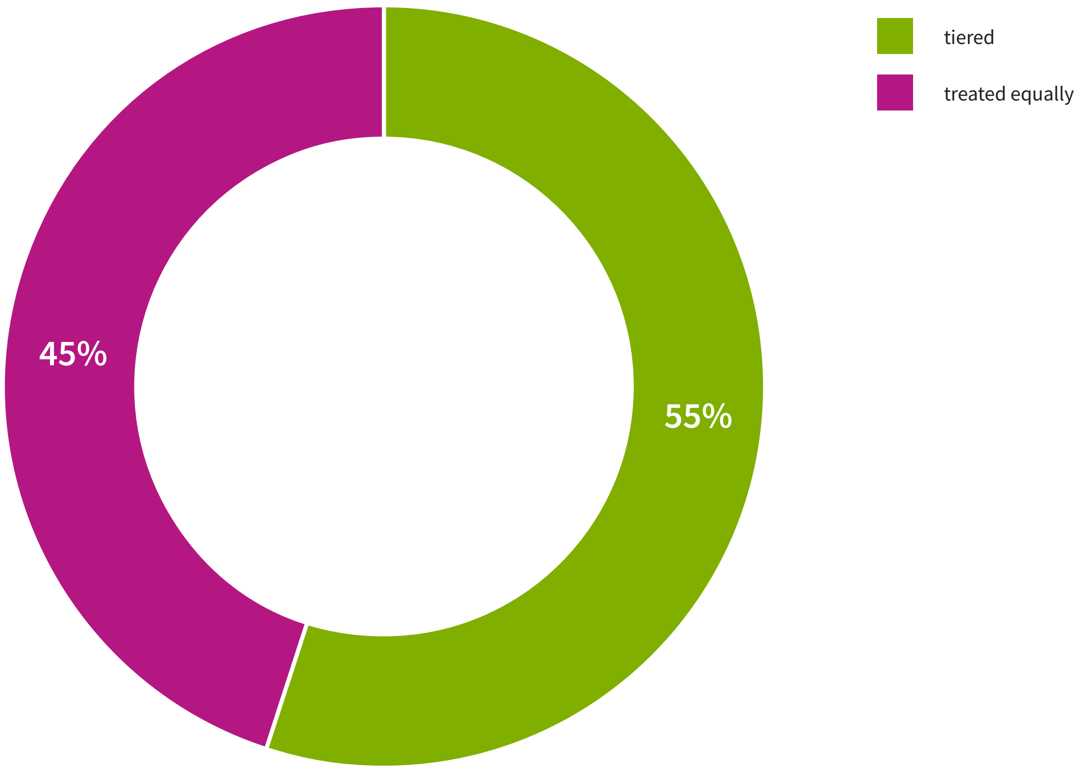
- The previous three editions of this survey said roughly the same thing, that c.20% of programs planned to become branded and external, but the task was incomplete
- This year's survey sees real progress, with 78% of programs now external and branded, and a mere 8% of programs planning to become branded and external
- This rings true; both the advocacy profession and marketing overall has seen a push for consolidation, technical integration and alignment
- With communities of all sizes, from user groups to CABs, we know advocates have a desire to belong and interact, and programs are embracing the SANE or SANER methodology to ensure sustainable mutual value (Status, Access, Networking & Education, plus the option of Rewards)



MORE TIES, MORE TIERS

Q: do you tier your advocates or are they treated equally?

- Back in the 2019 edition of this survey, 66% of programs said they were tiering their advocate base
- With 55% of programs reporting tiering this year, it's an increase on the last edition (51%) yet the split is surprisingly even
- As program consolidation and ties increase, we anticipate advocate tiering to increase even though this brings an associated complexity and cost
- In addition, increasing relevance is a key aim for many marketers and programs and one would expect tiering to be one of the tools supporting this strategy



BIG IS STILL BEAUTIFUL

Q: By which criteria do you tier your advocates?

- Size means everything when it comes to tiering advocates, at least according to the free-text answers to this question
- While tiering is predictably focused on brand size and recognition, or direct revenue, it's super to see 'engagement' rank so highly
- The persona or level of the advocate also has importance, along with relevance, either by industry or geo

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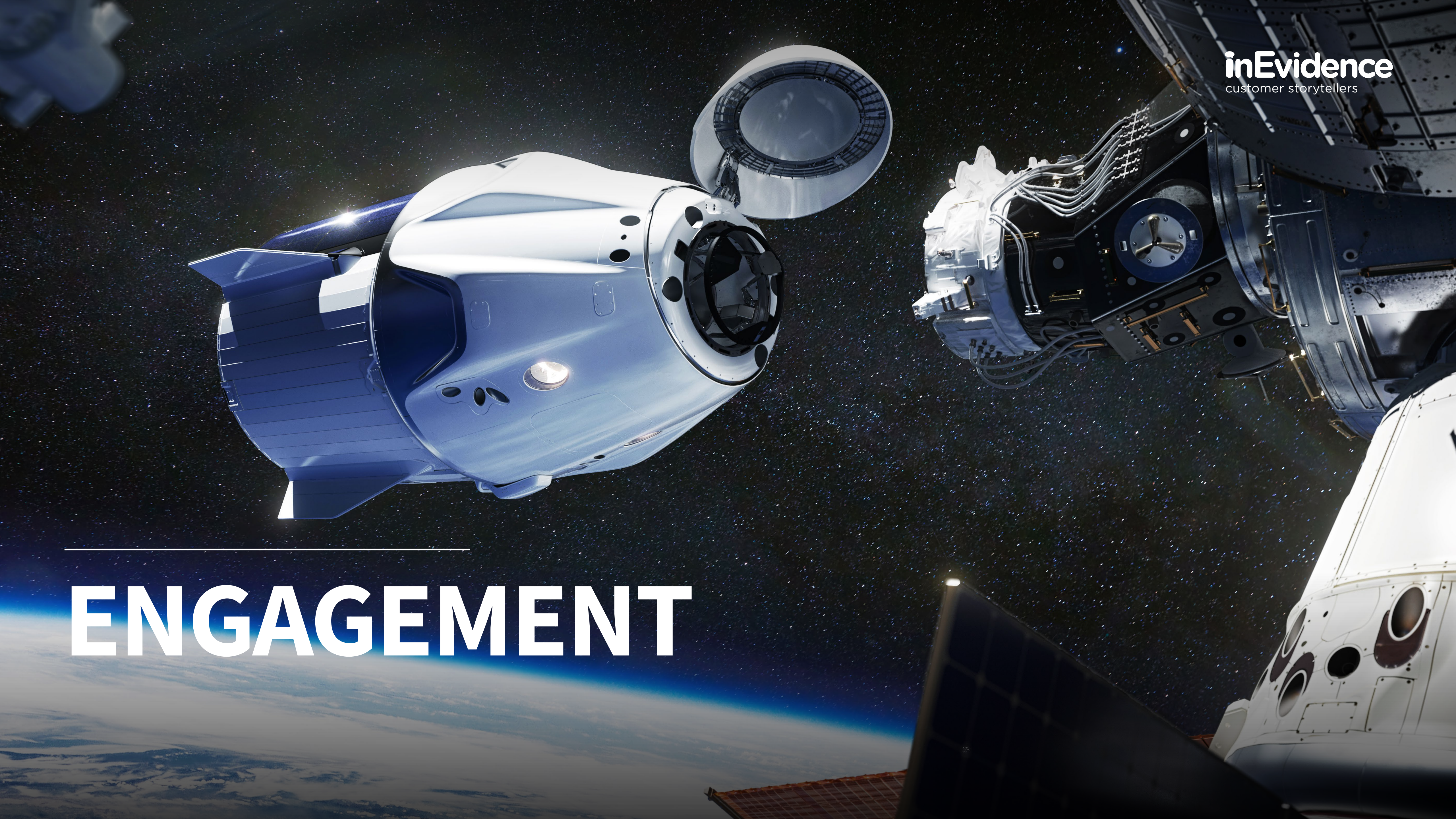
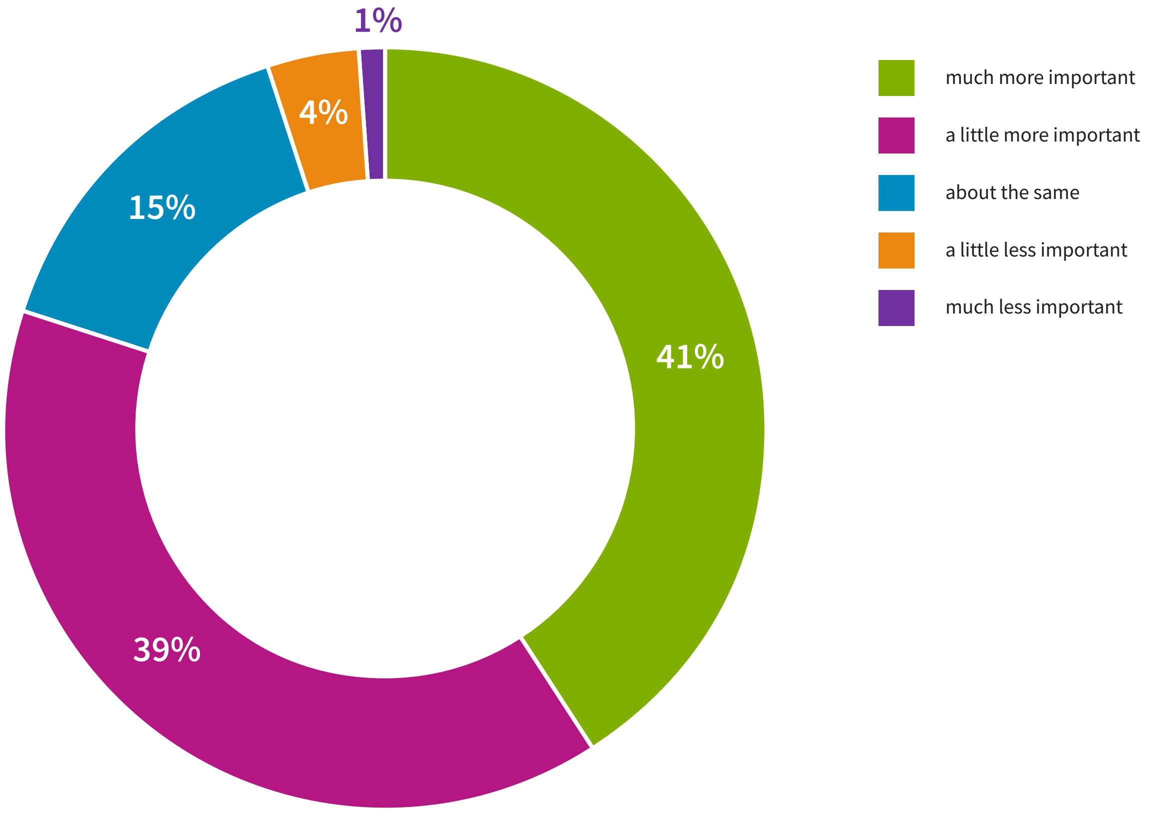


ENGAGEMENT

PROGRAM SUPPORT SOFTENS

Q: compared to two years ago, how do you think your program is perceived internally?

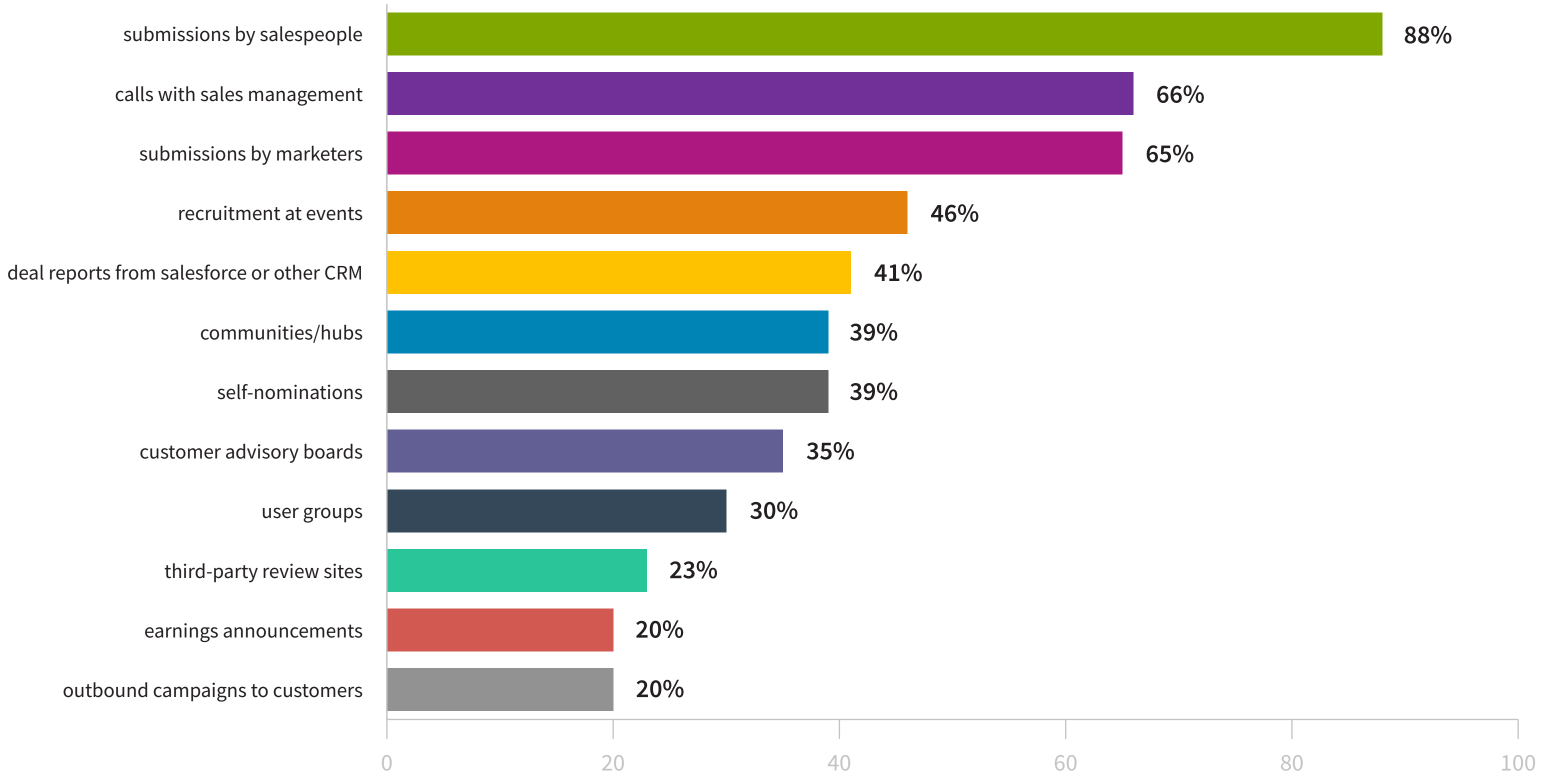
- Whilst 80% of responders say their programs are perceived as 'a little or much more important than two years ago', this is the worst result reported in any edition of this survey (was 91% in 2022)
- Normally the responses for 'a little or much less important' would be less than 3%, this time the result is still thankfully small, at 5%
- The percentage of responders reporting static program perception has more than doubled to 15% from 7% in 2022
- Whilst customer advocacy remains critically important for any organization, it's often a soft target when budgets are cut, the reasons for which include lack of exec support, lack of 'shiny things' and also that the impact of cutting advocacy budgets takes months or quarters to become visible



SOURCING SUCCESS FROM SALES

Q: where does your current pipeline of advocates come from?

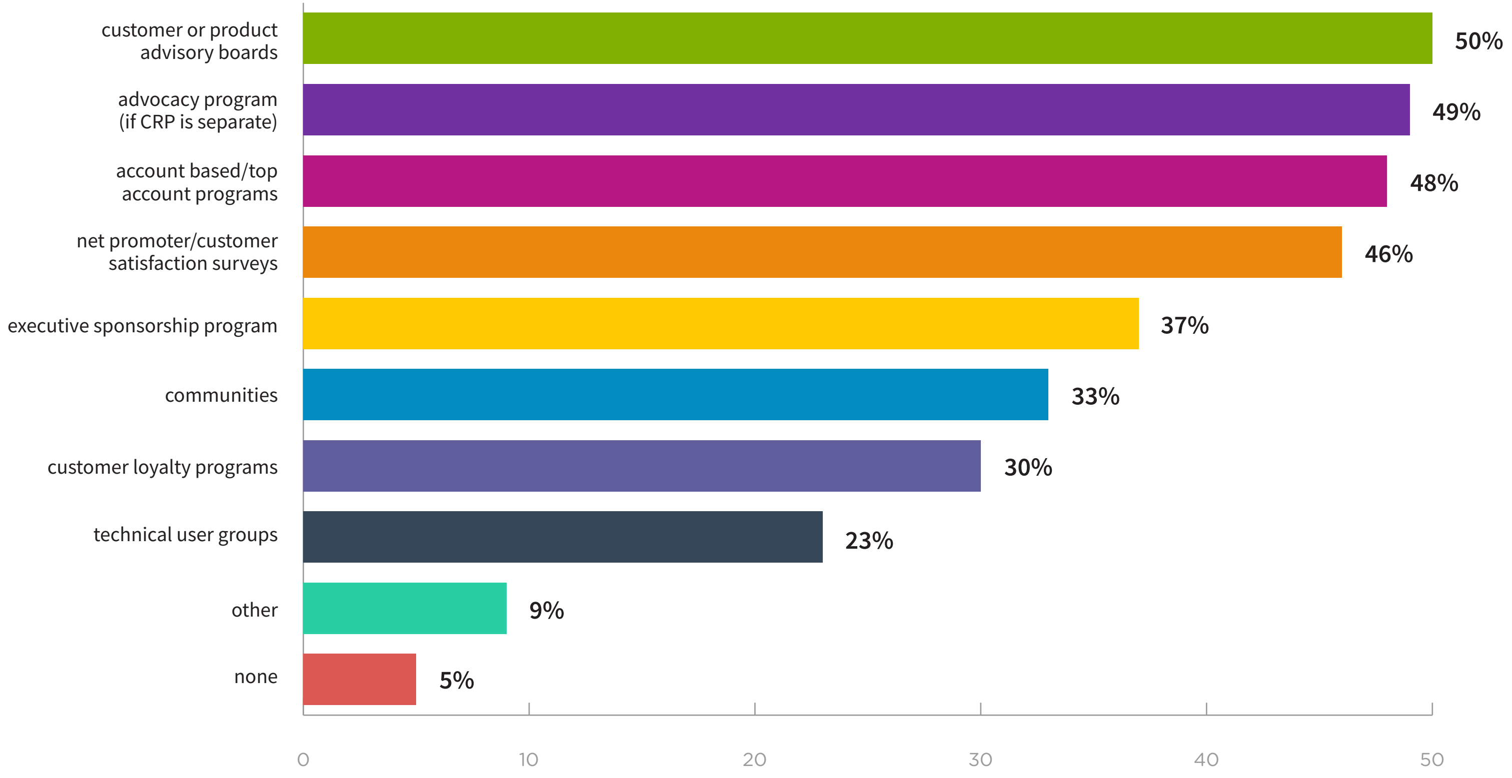
- A new question for this edition of the survey, it's fascinating to see all the methods customer advocacy professionals use to identify potential advocates
- On average, survey responders use just over five of these sources, both proactive and reactive, yet the obvious importance of the sales organization cannot be understated
- In a way this result does away with the trope (often cited by marketers) that salespeople are only interested in withdrawing from the reference bank rather than doing their bit and paying in



CONNECTING IS COOL

Q: with which other programs does your program integrate?

- With only 5% of programs being truly standalone, and an overall increase in the number of connections between programs, program integration is a clear focus
- Though not covered in the survey, we are also seeing more technical integrations between some lower-level activities, such as third-party reviews, surveys etc., often used as nomination pipeline



Note: Due to a technical glitch in this edition of the survey we've reverted to the results from the last edition, for sake of completeness

EXECS, EDUCATION, AND ENTICEMENT

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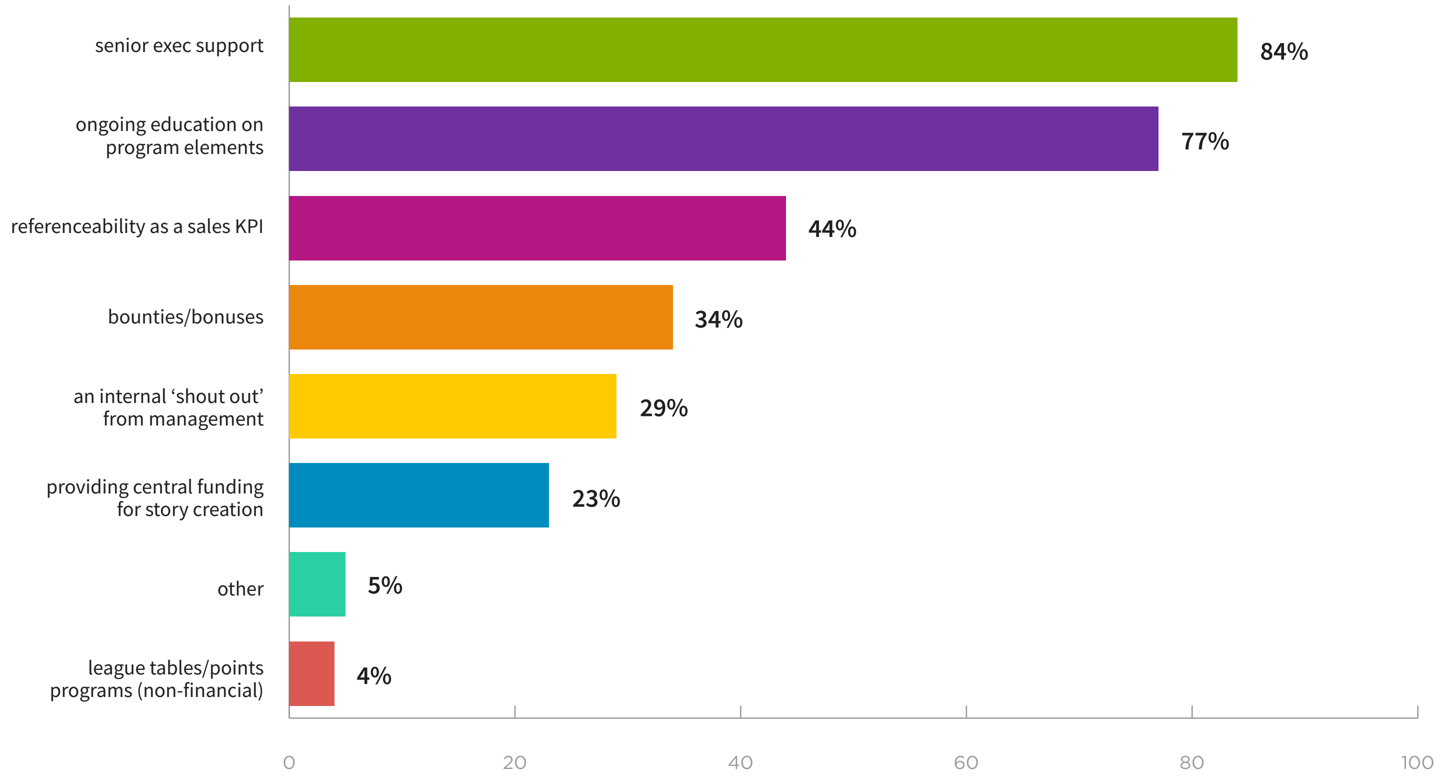
Q: top three methods to engage sales & marketing employees to provide reference customers?

- It's often said that a successful program must have three things: 1) happy customers; 2) an engaged sales team; and 3) executive sponsorship. Of these, senior executive sponsorship is the one that can have the most impact, not only smoothing sales engagement but also enabling the organizational change programs often require. It's therefore no surprise to see senior executive support remain at the top of the list
- Same for the importance of continual program education - communication should be an ongoing and regular activity, not a defined project
- Carrots (bonus) have increased from 31% to 34%, while sticks (KPIs) have decreased from 60% to 44%



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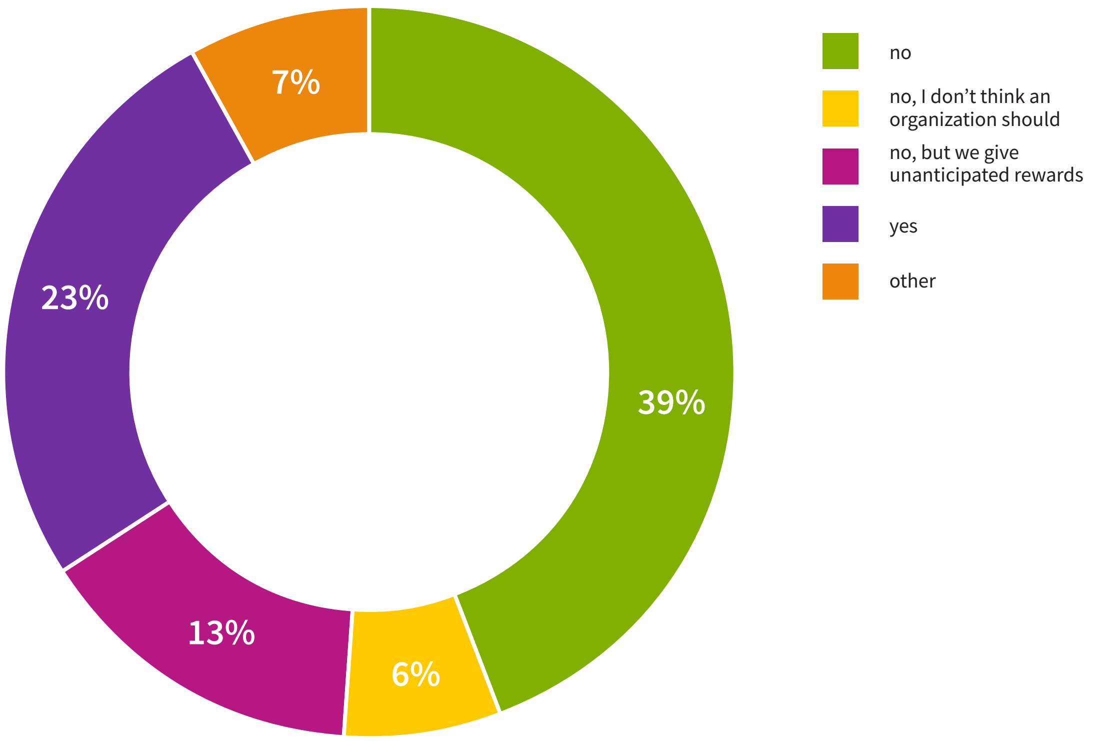
COIN-OPERATED?

Q: do you incentivize your sales teams to provide a pipeline of potential advocates?

- This question always shows polarization of views, with 45% of responders not incentivizing sales, or believing it should happen at all
- That said, programs providing incentives are still in the minority, only totaling 23%, with another 13% favoring unanticipated rewards
- As stated by a senior salesperson at a recent AMA event, "salespeople are coin-operated". It's certain that salespeople have a tough job, with lots of time pressure
- Techniques mentioned in responses include: ongoing financial incentives, redeemable points, gift cards, specific sales program incentive funds (SPIFFs), as well as sales leadership recognition/kudos



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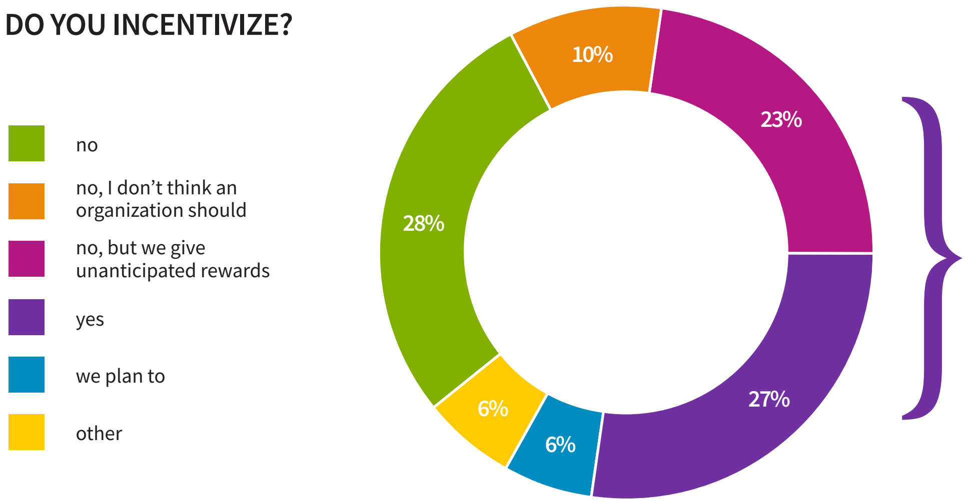
IS ADVOCACY FREELY GIVEN?

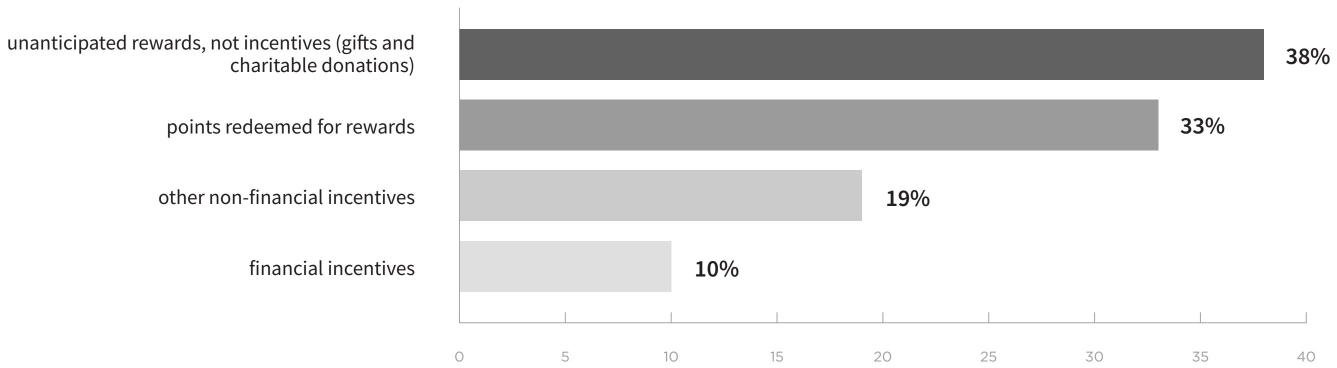
q: do you incentivize your customers to participate in reference activities?

- This answer is surprising, especially when one considers advertising regulations. The data shows that a mere 38% of responders do not incentivize customers
- Unanticipated rewards, at 23%, are something we can all get behind: customer delight
- Many programs state, loudly and legally, that their customers have received nothing in return for participation. These numbers are holding steady, as are ‘points-make-prizes’ programs

DO YOU INCENTIVIZE?



IF SO, HOW?



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TEAM AND BUDGETS

STAFFING LEVELS DECREASE

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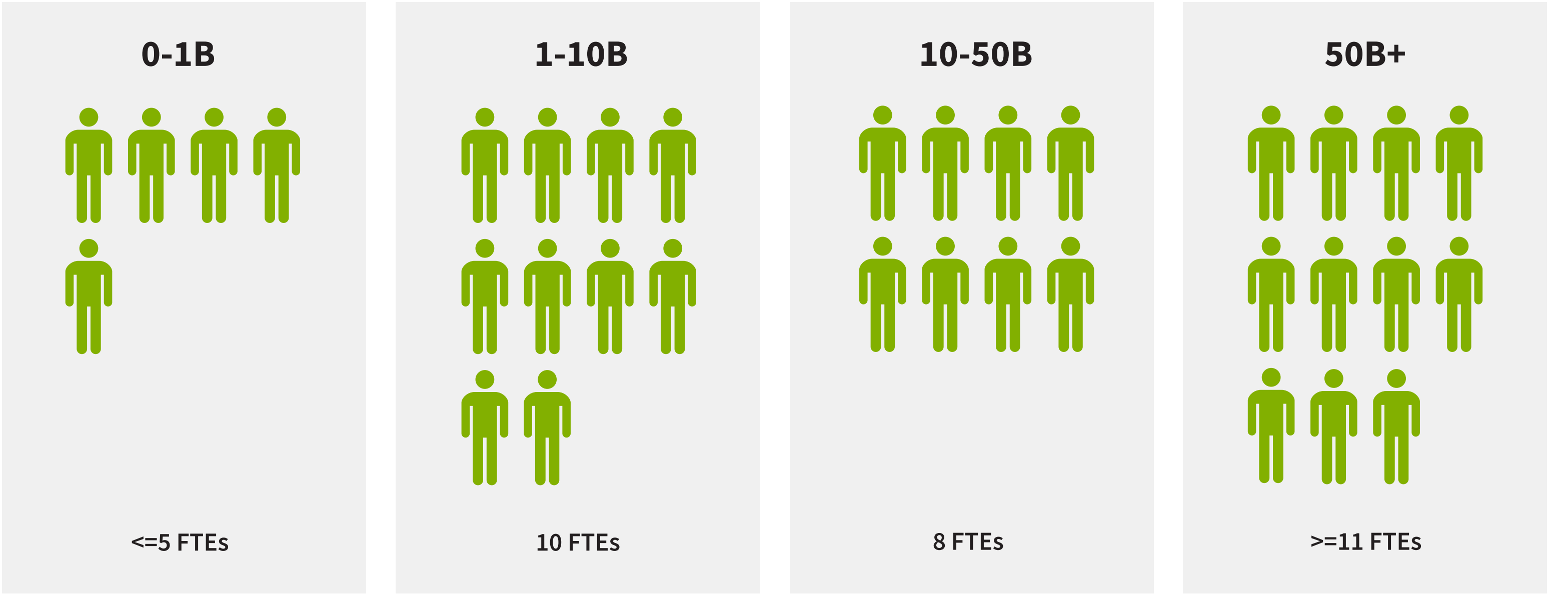
Q: how many FTEs (full-time equivalent staff) does your program have?

- As anyone who has tried to calculate this will tell you, there is no obvious way to correlate company size, budget spend, and the number of FTEs
- What we can see is the impact of team cuts, reversing the growth that's been reported over the last few years
- There is usually a bump in the results and this edition of the survey is no different, the only segment to show any average FTE growth is the 1-10B company size, perhaps impacted by the composition of responders, or perhaps because these more agile organizations are rebuilding more quickly
- All other segments are down by an average of one to three headcounts, and of course some programs might have one FTE or 30
- Combining this question with others, what is becoming clear is the importance and use of skilled specialist agencies, as work still needs to be done and this can be financed via different, flexing budgets

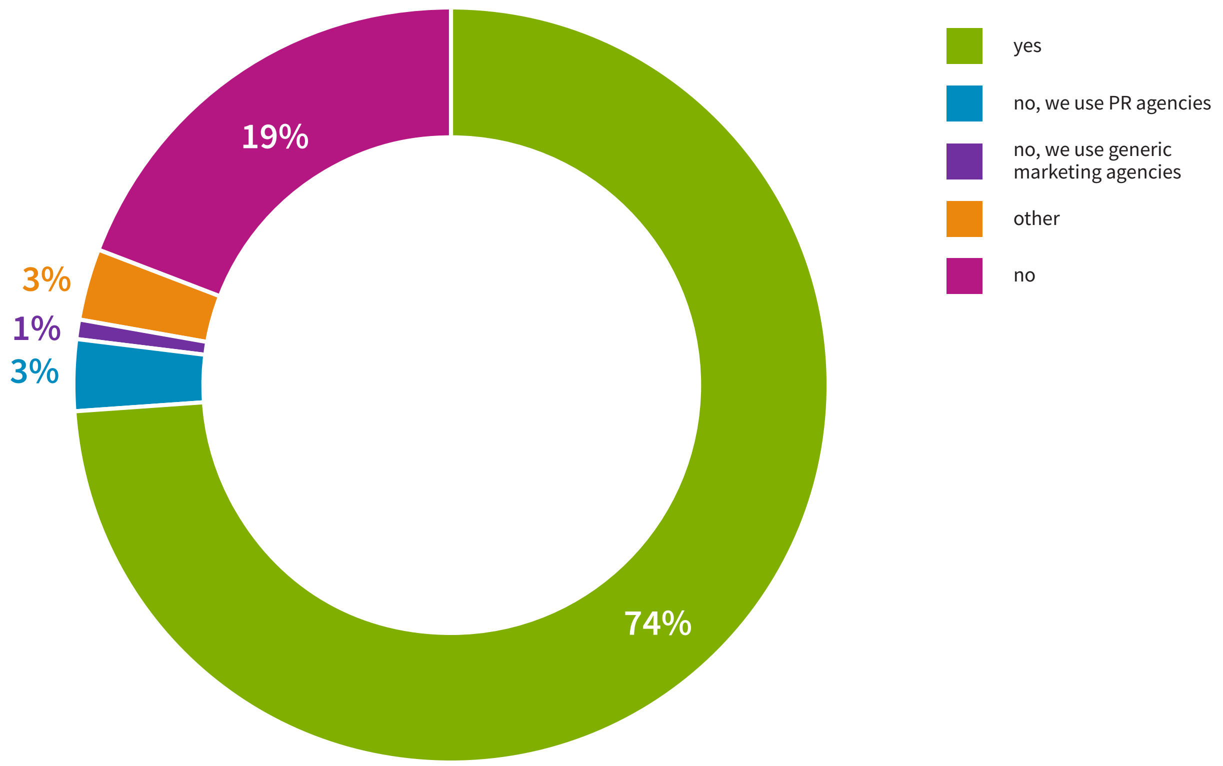
company size (US$)



ADVOCACY AGENCIES ASSIST

Q: do you use specialist customer reference/advocacy agencies to support your program?

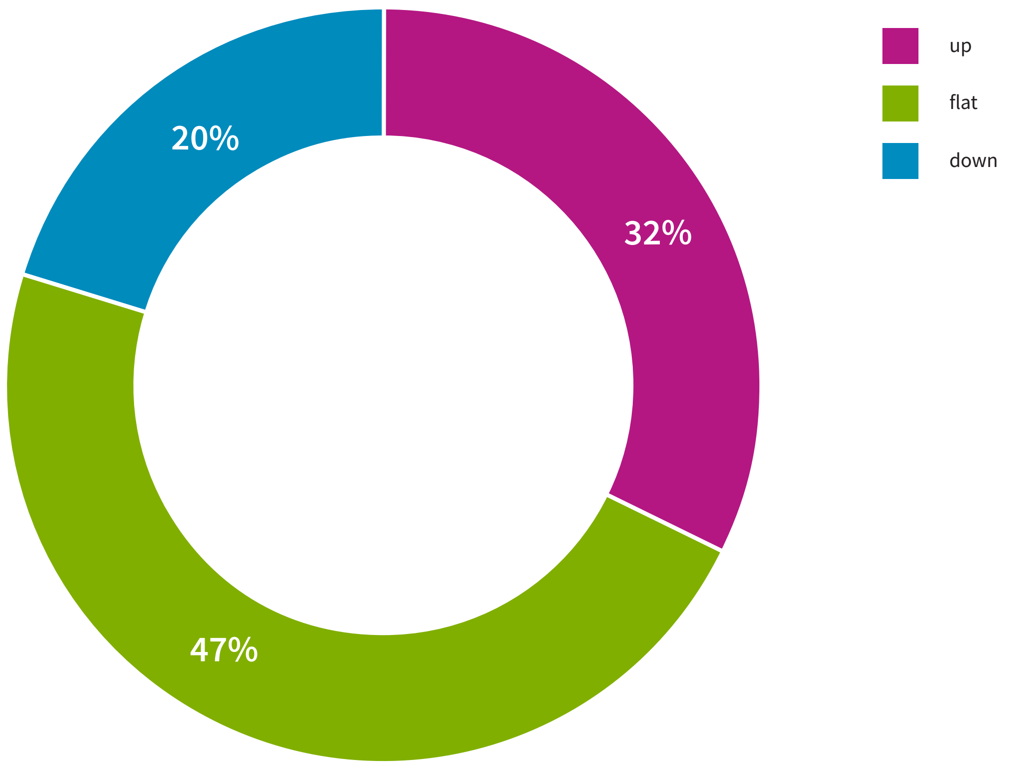
- 2023 was the perfect storm for tech organizations; over expansion during COVID, general tech overvaluation, higher interest rates, double-digit inflation, and talk of recession. This resulted in a year of carnage for tech marketers, seemingly hitting customer advocacy professionals more than most
- This edition's responses show a huge increase in the need for skilled specialist support (from 61% to 75% of programs), balanced with a corresponding reduction in the engagement of generalist agencies (from 11% to 1%)
- The percentage of programs that don't utilize external support dropped ten points, from 28% to 19%



BUDGET BOTHER WAS BREWING IN 2022

Q: let's look back. Compared to 2021, was your 2022 program budget up, flat or down?

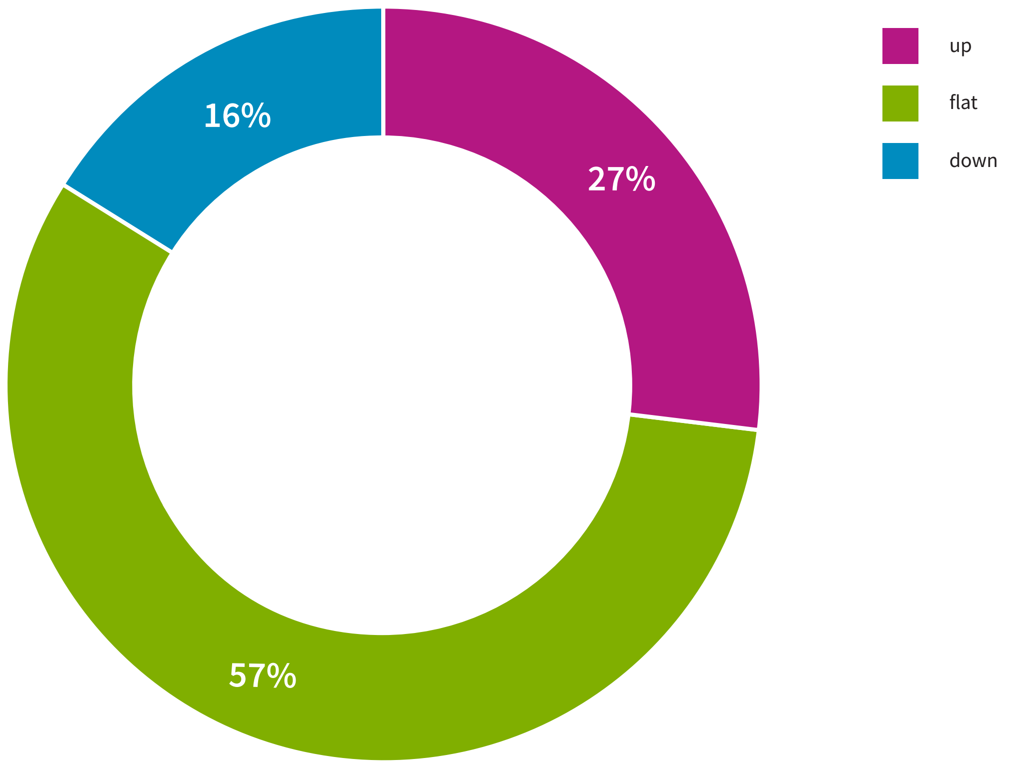
- 2023's turmoil began in 2022, with actual budgets being very different to those anticipated
- In a previous edition of this survey, responders predicted that for 2022:
  - 49% of budgets would increase
  - 43% would be flat
  - 9% would reduce (up from 3% previously)
- The reality was:
  - 32% of budgets increased
  - 47% remained flat
  - 20% reduced



FLAT FINANCES FEATURED IN 2023

Q: is your 2023 program budget up, flat or down?

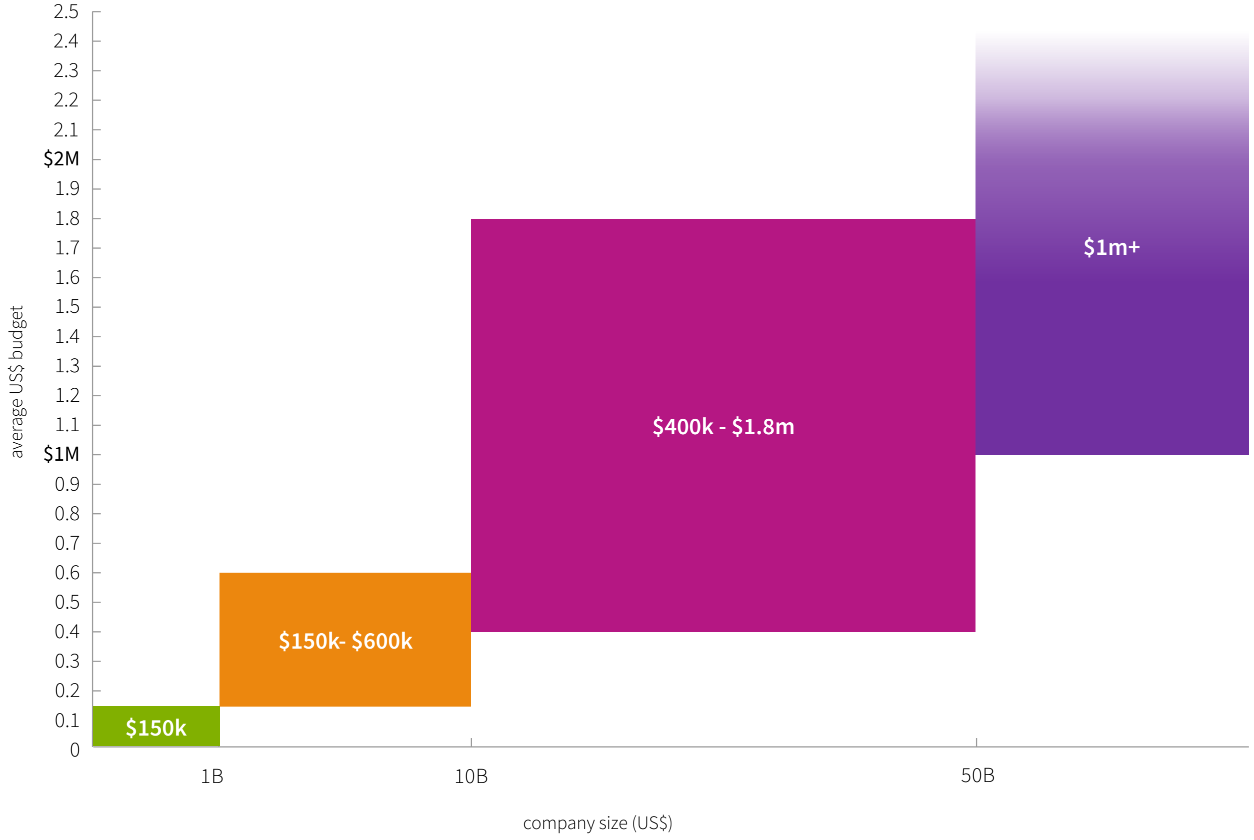
- We asked this question back in Oct/Nov 2023, so responses carry high statistical relevance
- The overall negative trend, begun in 2022, continued. Even more concerning is that this was in a time of double-digit inflation
- Having a flat budget compared to 2022 was the most common response, for 57% of budgets compared to 47% in 2022
- The percentage of budgets that had reduced was 27%, an even worse result than the 20% in 2022
- The number of program budgets reporting an increase halved compared to 2022, down from 32% to 16%
- It’s too early to predict 2024 budgets yet, but early signs are slightly more positive than in 2023



LEVELS OF INVESTMENT

Q: annual level of program investment, excluding people?

- As well as optimum team size, this is the question we're asked most often and, as we always must state, trying to meaningfully tie levels of program investment to a percentage of organization size is more an art than a science
- Some folks are unable to, or feel uncomfortable in providing a value; the good news is that 70% of responders were able to complete this question. Thank you!
- While the bands are wide, there is certainly a level of correlation
- Even though the majority of 2023 budgets were flat, there are still many programs with budgets in excess of $1m, likewise there are numerous programs for which $100k represents a sizable investment



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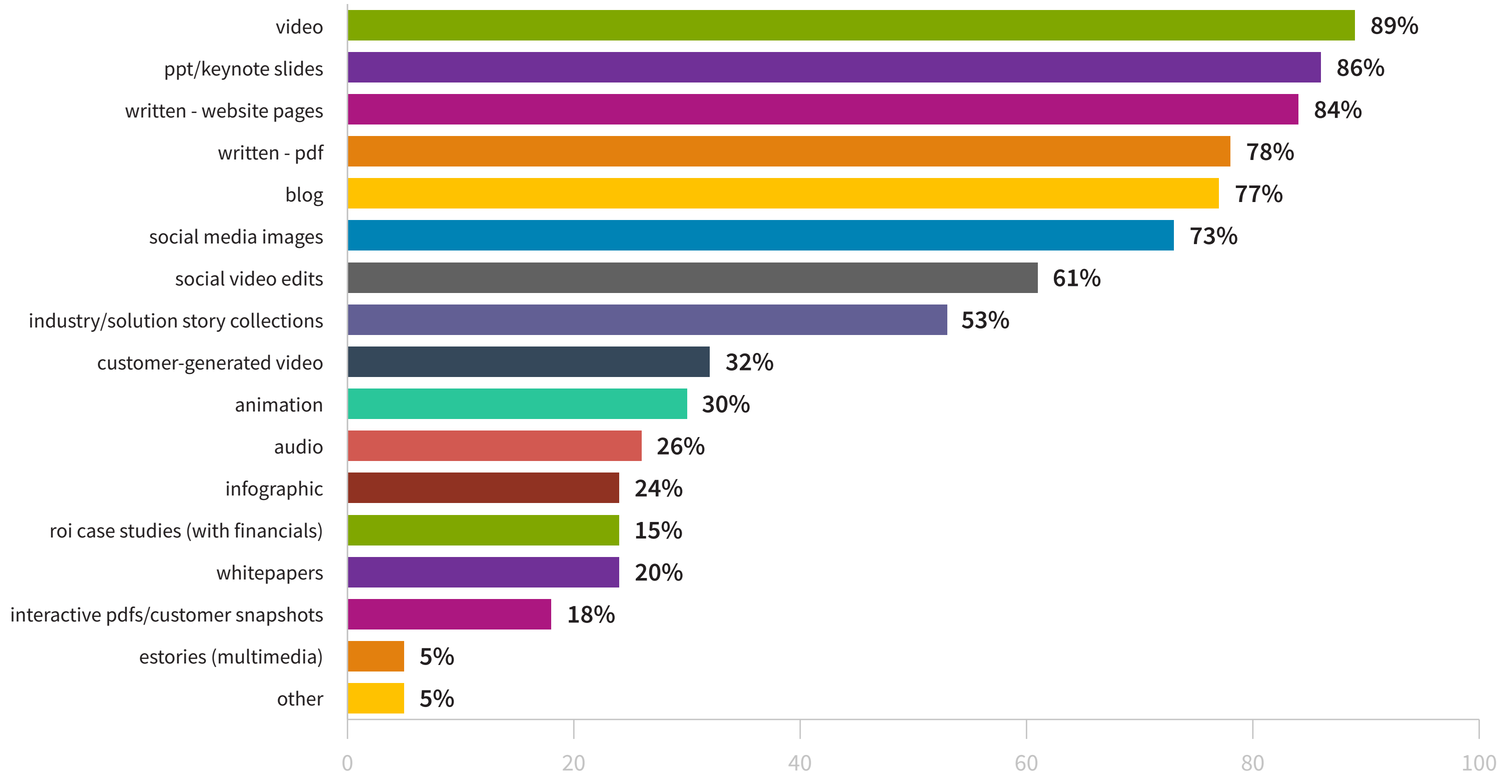
CUSTOMER STORIES

EIGHT ASSET AVERAGE

Q: in which formats do you create customer stories?

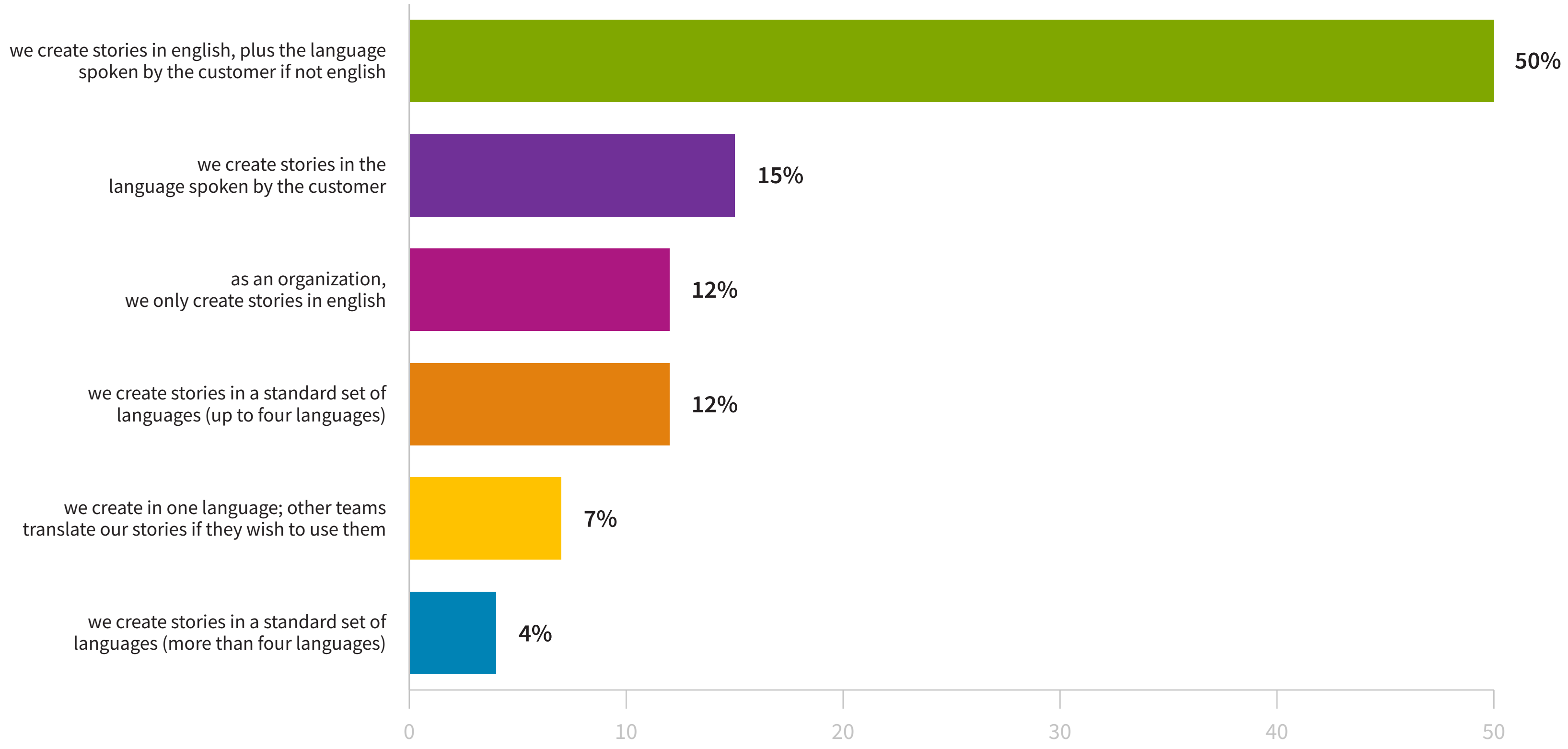
- Remember when we simply created two or four page PDF case studies, along with a PPT slide?
- The world has changed forever, and the rise of the BOM (bill of materials) continues. Survey responders now report they create stories using an average of <u>eight</u> different types of assets
- In the next survey edition we'll be able to take a deeper dive into the impact of A.I. on assets, whether creating original content or re-purposing
- Video, written and PPT remain the assets of choice, with both long and short formats featuring
- Customer-generated (prompted rather than spontaneous) video has been included for the first time, let's see the trends over time



FULL ENGLISH

Q: what's your approach to story languages?

- This edition's chart is almost identical to the last
- Whilst it might be true that, when communicating for the purpose of influence, empathy and relevance are everything, when it comes to business comms English is often the 'one size fits all' approach
- We anticipate substantial technology-driven change here in the next few years; increasing relevance and accessibility



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DIVERSITY AND ACCESSIBILTY

DIVERSITY WITHIN OUR PROFESSION

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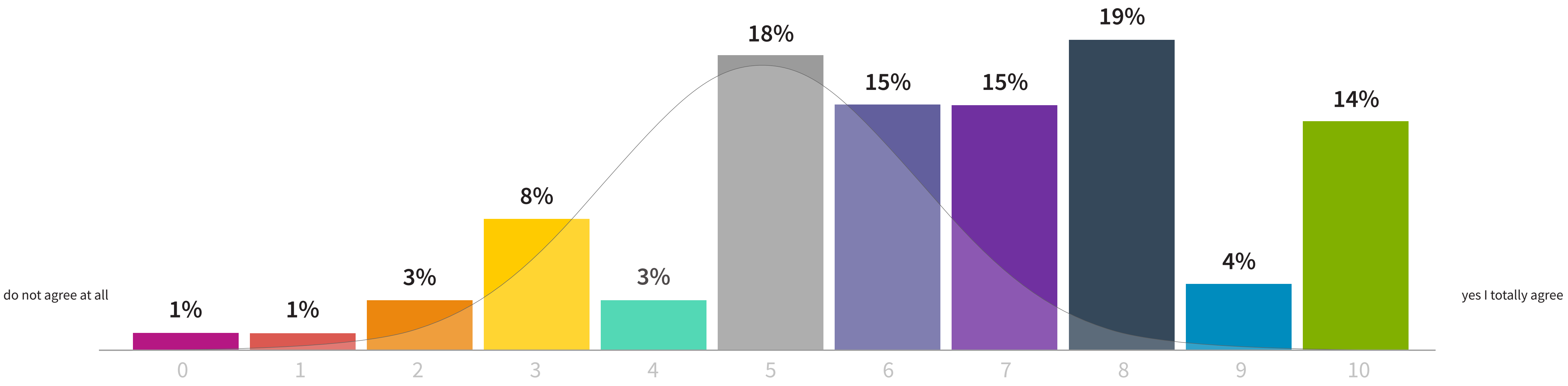
Q: how much do you agree with the statement 'customer advocacy professionals ARE sufficiently diverse'?

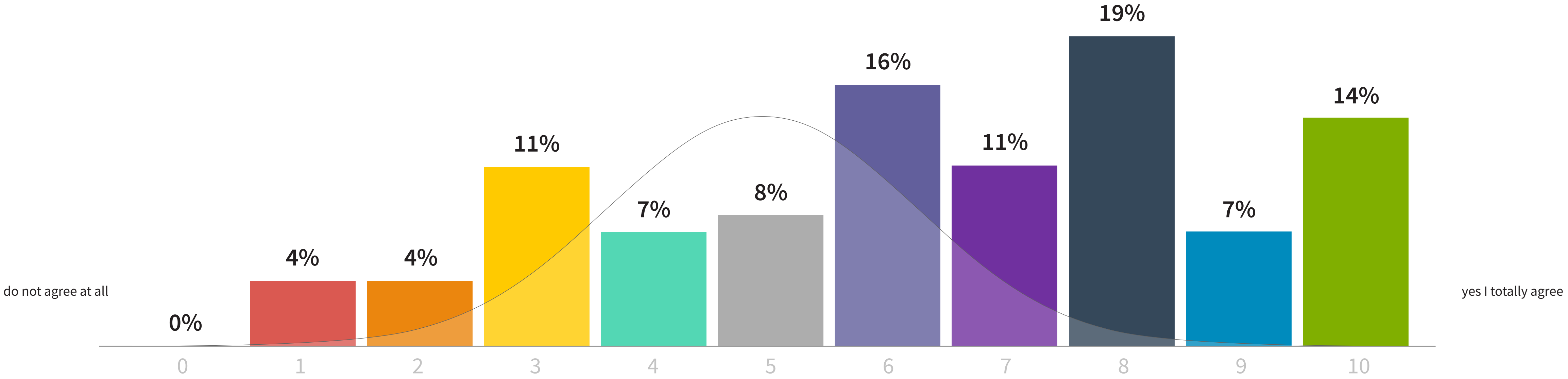
- Without exception, all technology companies now have DE&I polices (and often KPIs) in place
- If we sum the four columns on the right, which equate to varying degrees of agreement that our profession IS sufficiently diverse, it totals 52%. In 2022 this figure was 41%. Doing the same with the four columns on the left, equating to varying degrees of agreement that our profession is NOT sufficiently diverse, the total is 17% vs. 21% in 2022
- These responses show a belief that not only progress has been made, but perhaps there is no issue in the first place
- Progress is being made, however this result is still a little baffling when one considers the reality of our profession



DIVERSITY WITHIN OUR STORIES

Q: how much do you agree with the statement 'the customer stories we create DO feature a sufficiently diverse set of customers'?

- Advocate marketers have the power to increase the diversity of advocates in our stories
- Compared to the 2022 edition of the survey, responders are reporting that progress is being made; note that only 12% of responders are measuring the diversity of their advocate pool (down from 16% in 2022). It's unclear how many companies have story diversity KPIs
- The four right-hand columns (equating to varying degrees of agreement that stories DO represent diversity) total 51%, up from 40% in 2022
- The four left-hand columns (equating to varying degrees of agreement that stories DO NOT represent diversity) total 19%, down from 25% in 2022



ACCESS ALL AREAS

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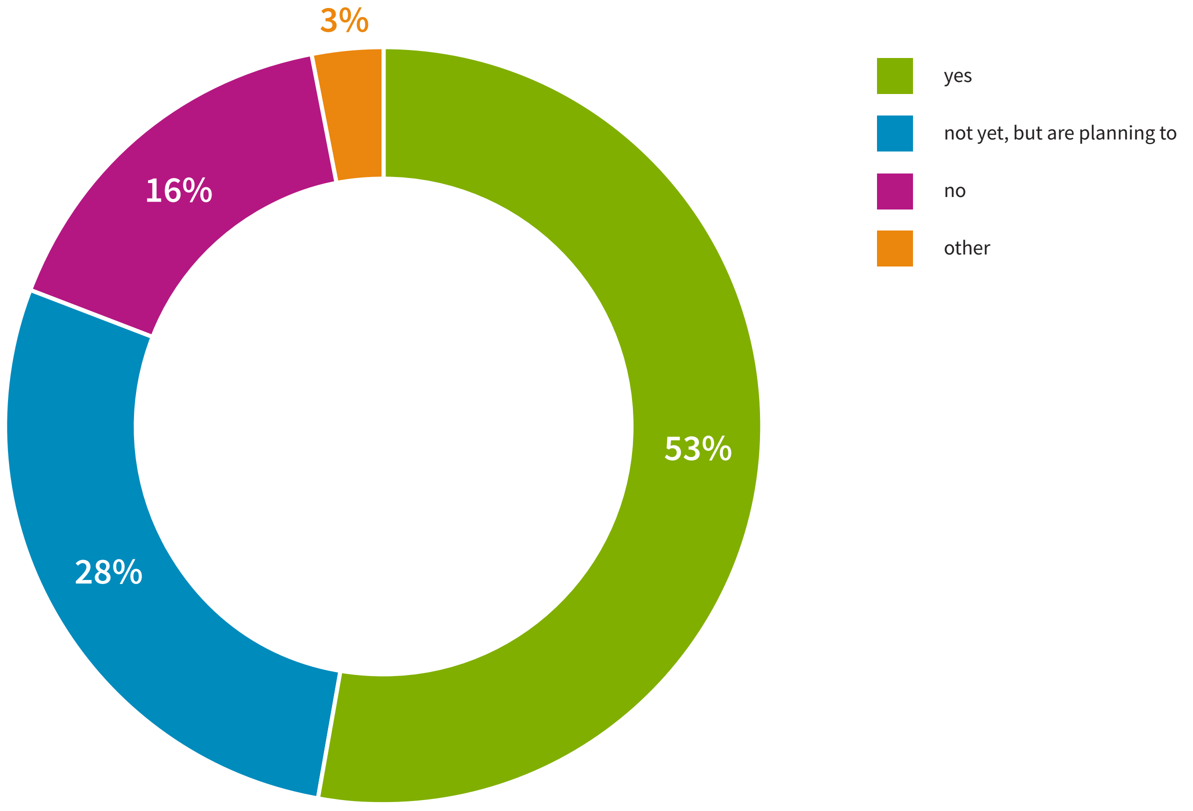
Q: are you thinking about the accessibility of your stories for those differently abled?

- Awareness of, and the push for content accessibility, continues to increase, with 'yes' at 53% in this edition, up from 40% in 2022
- Taken together, 'yes' and 'planning to' total 69%, almost the same result as for 2022, but with much more action rather than talk
- That said, having over 25% of responders not actively working on accessibility is a shocking result
- Techniques being utilized:
  - Video edit pace enabling audio description
  - Lowering the level of background music
  - Subtitle files that allow the viewer to adjust font size
  - Slower edits, reduction in flashing light
  - Using alt tags on all images
  - Using a descriptive title for links
  - Ensuring content can be navigated using a keyboard
  - Simultaneous interpreting for customer interview



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METRICS AND TECH

MEANINGFUL MEASUREMENT

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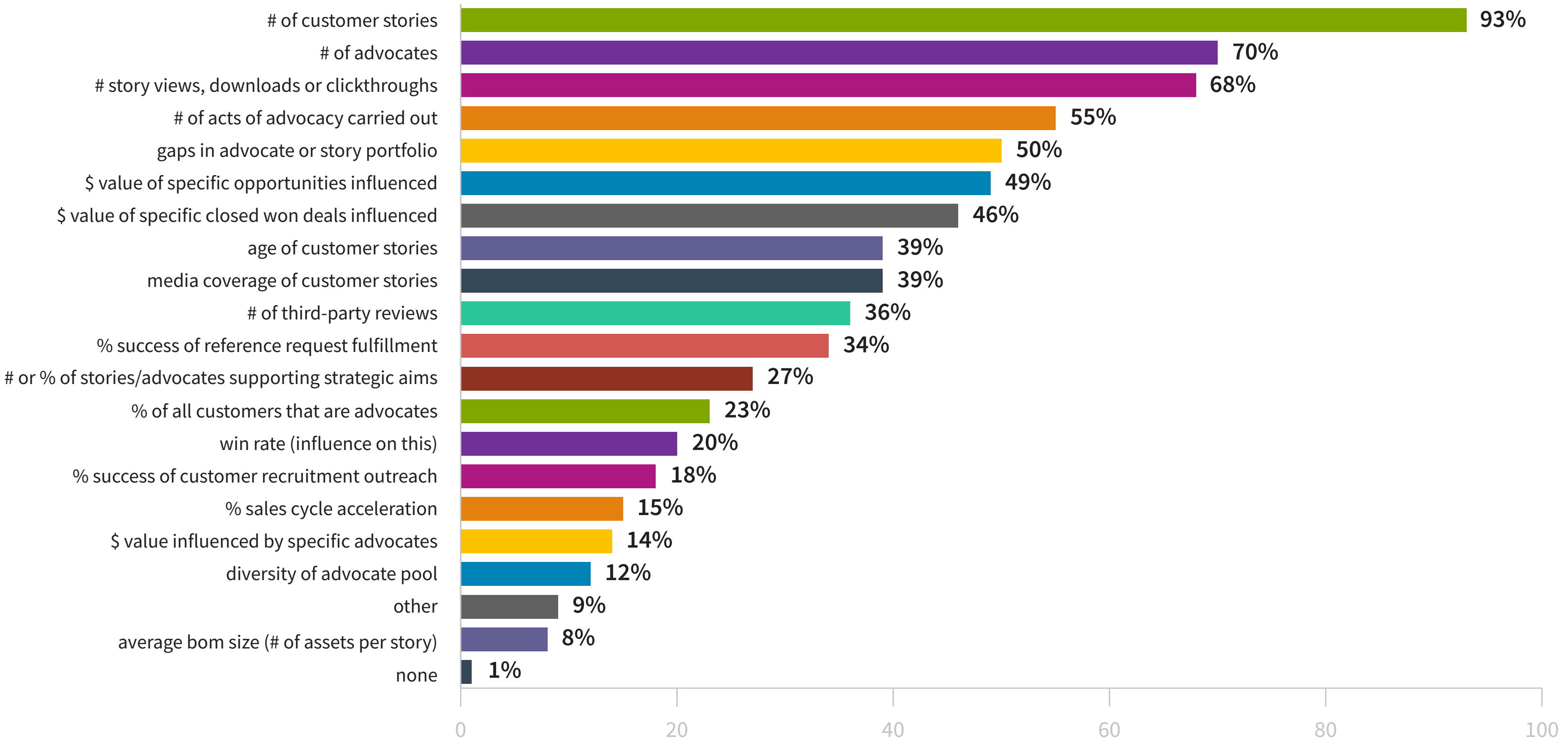
Q: which of the following does your program measure?

- Marketing now has to be measurable. Being a customer advocacy manager is one of the few roles that can genuinely tie the work one does to $ value of opportunities influenced, and to value of the advocates themselves
- The usual volume and value metrics are here; almost half of programs are measuring influenced opportunity $ values, yet no change from 2022
- Thinking bigger, not only are responders reporting that advocate diversity is of little strategic importance, with only 12% of programs measuring it, this percentage has reduced from 16% in 2022
- On average, responders reported utilizing nine of these metrics. The lowest number was one, and the highest nineteen



(ADVO) STACKING UP

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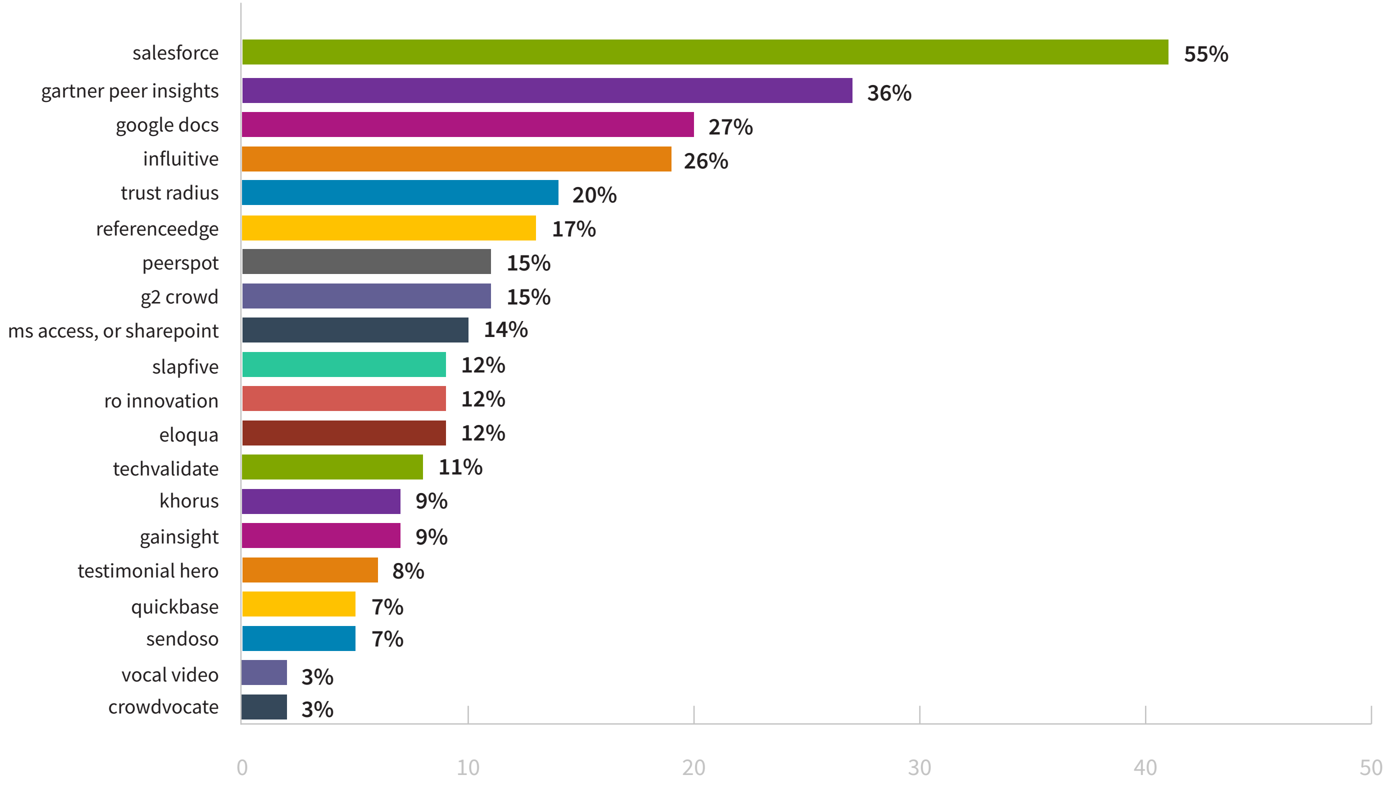
Q: there are lots of martech apps out there. Which of the below does your program regularly utilize?

- This edition of the survey is the third time we've asked about the AdvoStack
- The average number of tools utilized is four, remaining roughly the same as previous editions. With an average of four, some programs are reporting the use of many more
- Salesforce, Gartner Peer Insights and Google remain popular as anticipated, specialist reference program management apps such as ReferenceEdge show solid performance, and the UGC (user-generated content) tools are here to stay
- It's easy to get befuddled by all the tools and APIs; let's remember they don't replace strategy and relationships, and many programs begin with a simple spreadsheet

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GETTING ADVOCACY
OUT THERE

SETTING STORIES FREE

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Q: which marketing channels do you use to promote/amplify your customer stories?

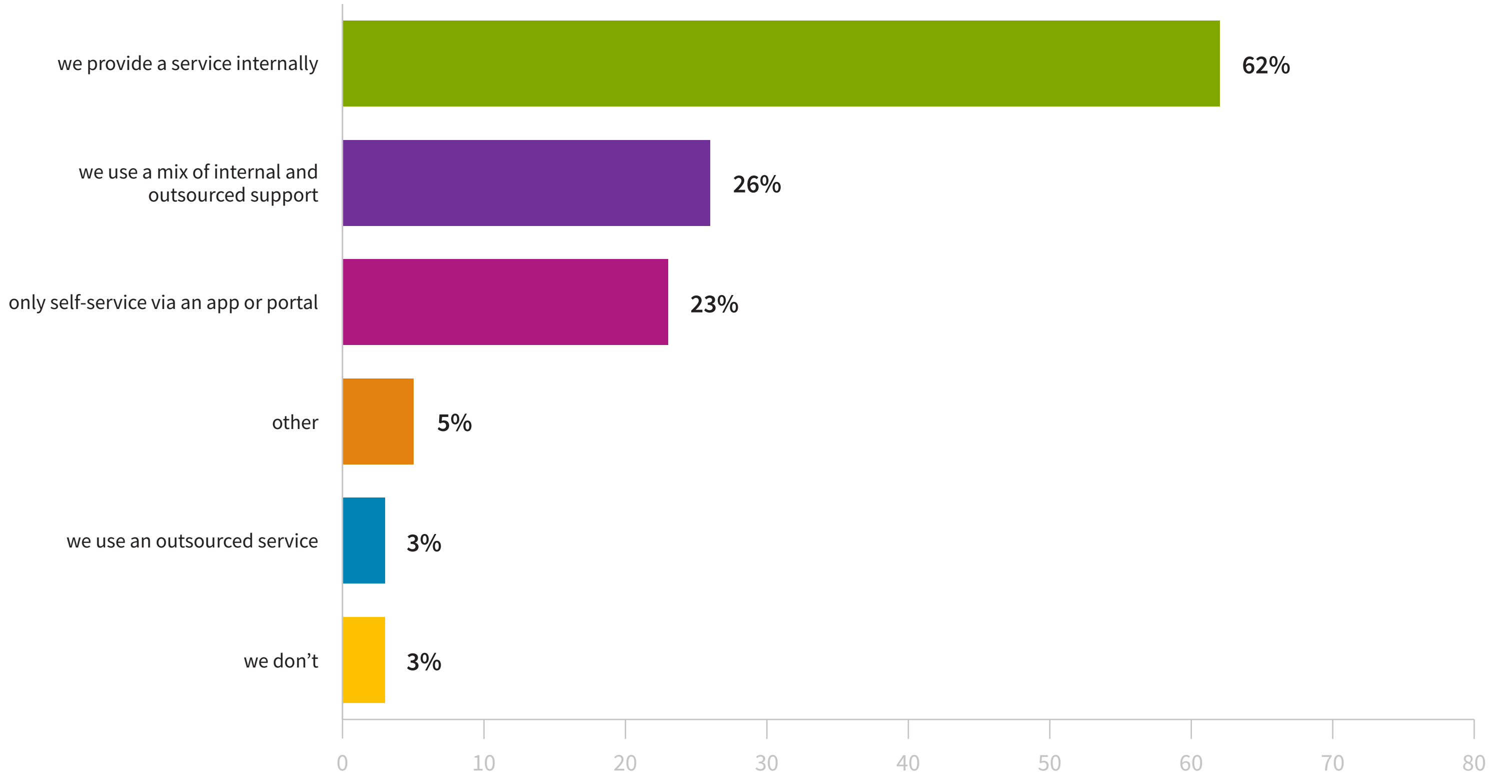
- All responders use their corporate website, so this option is removed from the chart
- LinkedIn remains popular, yet the largest percentage increase is with YouTube, up from 56% in 2022, to 78% in this edition
- There is no doubt a connection with YouTube's increase and reduced use of X, formerly Twitter
- On average, responders are now reporting the use of 10 amplification channels, up from eight in 2022
- Whilst 'demand-gen campaigns' has reduced by 20%, from 90% in 2022, utilizing advocates with analysts has increased by 14%, up to 49% from 35% in 2022

[1] CRP app microsites [2] reddit (4%) [3] tiktok (3%) [4] other (4%)

REQUESTS FOR REFERENCES

Q: how does your program provide references?

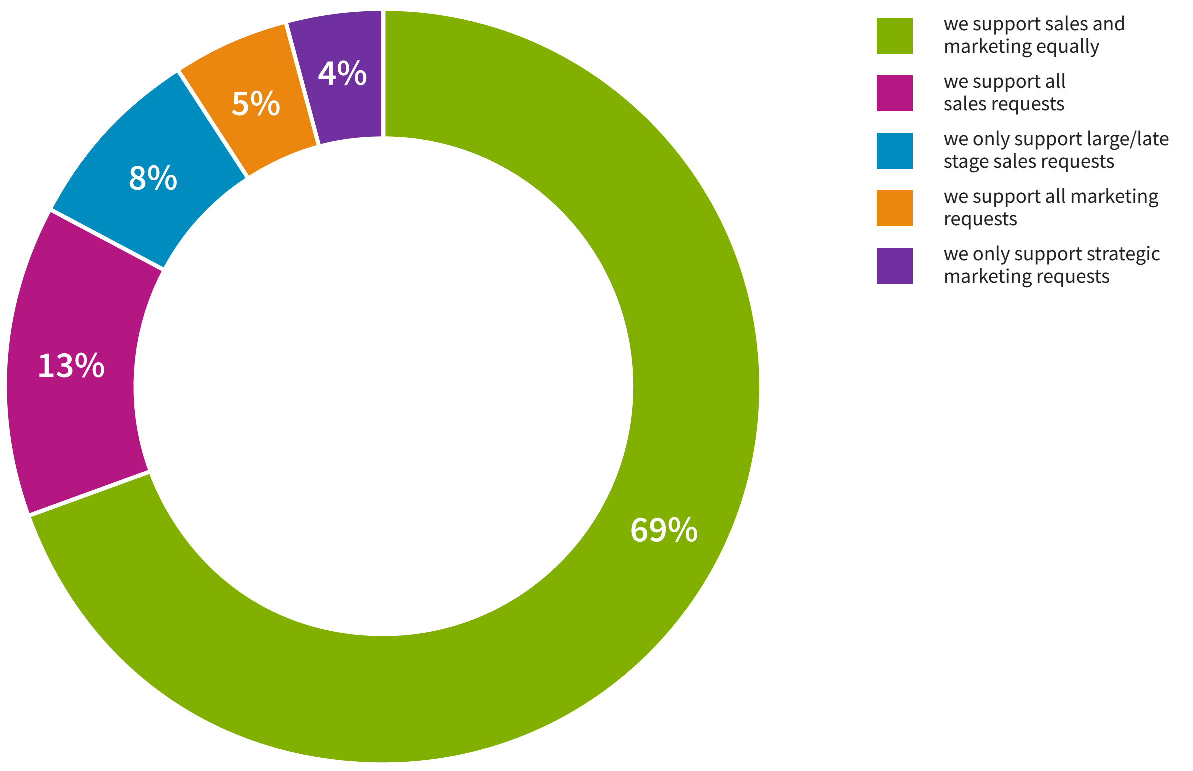
- This question focuses on the techniques used for supporting reference requests (we cover story distribution and amplification channels in another question)
- In line with an increasing need for external, skilled resource, the percentage of programs using external support to fulfill requests, partially or fully outsourced, has increased to 29%, from 25% in 2022
- 97% of programs support requests for references, and fewer than a quarter of programs (23%) use a self-service model



CONCIERGE REQUEST SUPPORT

Q: if you provide a ref fulfillment service, do you support both sales & marketing?

- It's interesting that, with so much talk of self-service, 79% of responses to this edition of the survey confirm that request support is available
- Even more fascinating, 69% of programs report that both sales <u>and</u> marketing requests are supported
- As anticipated, there is also dedicated and focused support for specific marketing (including strategic) and sales (including large/late stage)



ABOUT US

inEvidence
customer storytellers

inEvidence

A specialist global team, inEvidence is known for strategic expertise, creativity and delivery; building the strategies your business needs to unlock the innate trust we all share in authentic, relevant and human stories.

With a team of fifty, in offices around the globe, inEvidence supports its clients with all things customer-advocacy-shaped; from the creation of a few customer stories to producing multi-language full production videos, crafting and running a fully-outsourced complex global program, and everything in between.

Advocate Marketing Academy

Around 17 years ago, we realized EMEA customer references/advocacy pros, or marketers that use customer stories as part of their mix, had no formal career path and nowhere to meet, share and learn.

Often they believed they were alone. Thus the Academy was born, and from an initial dozen of us around a dinner table all that time ago, Advocate Marketing Academy has grown to a highly regarded, international series of events, a resource of best practice, a series of workshops and a community of which we are very proud. For more information please visit advocatemarketingacademy.com

Come to AMA Europe '24

The next European Academy is to be held on the 12th March in Maidenhead, UK, just west of London.

One very special day of deep customer advocacy activity, presentations from your peers, workshops, and lots of valuable networking time.

GRAB YOUR TICKETS NOW!

AMA24
POWERED BY inEvidence

WHO RESPONDED

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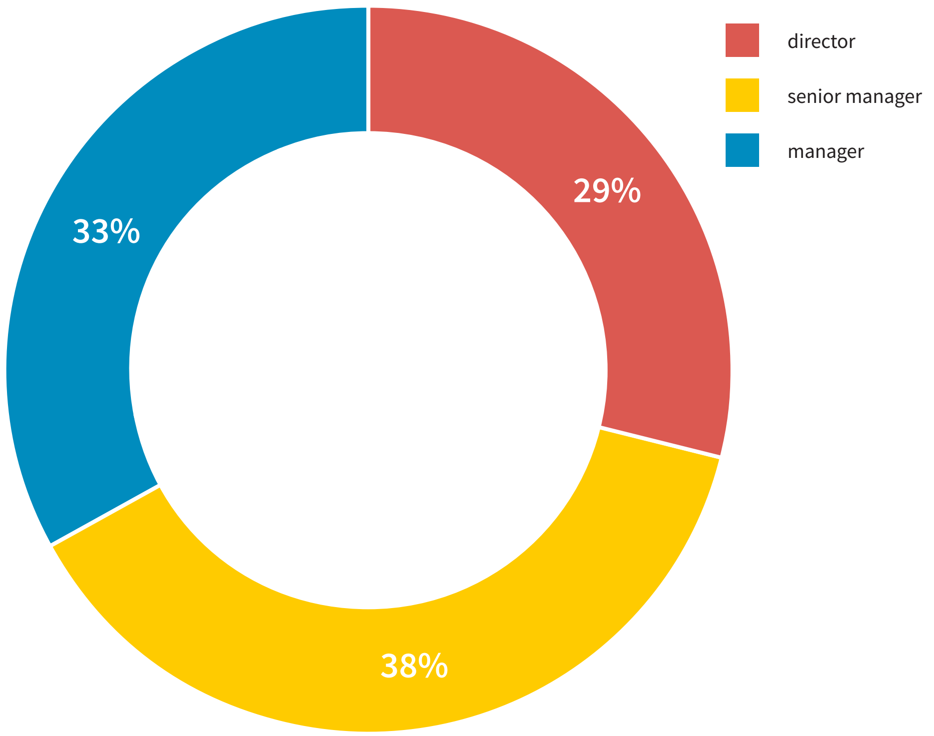
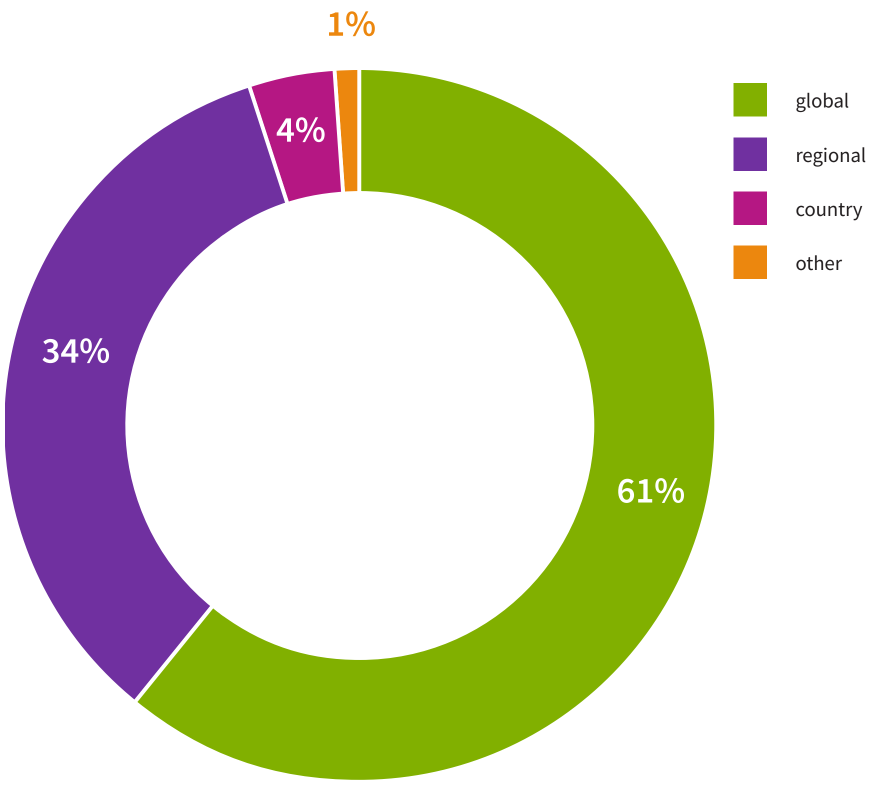
- Verified responses were placed into three job levels: Director, Senior Manager and Manager
- There was solid representation across the spectrum, and an impressive percentage of women in leadership roles within our discipline - even stronger at the Director level than at Manager level





find out more

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