

Econsultancy

THE DIGITAL FUTURE

IN PARTNERSHIP WITH



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FOREWORD



Michal Magdziarz
Chief executive
officer, DeepCrawl

WHAT WILL MAKE A BRAND SUCCESSFUL IN THE DIGITAL FUTURE?

Knowing the answer to this question is in many ways what will separate the marketing leaders who'll guide their brand to long-term success, from those that will inevitably flounder.

Today, almost every business on the planet has transitioned online. What was once a slowly rising technological tide has ruptured into a tsunami, and its impact is truly astonishing to see.

We have also entered a new era of automation. Though the research found within this report suggests that few marketers are using it to their advantage today, nearly every leader surveyed agrees that it will play a big role in the not too distant future.

The research also reveals that 89% of marketing leaders agree that organic search will drive more revenue in the future. It goes without saying that ensuring your brand is not only present, but successful in search, is essential.

Despite this, in many organizations, SEO remains sidelined.

While CMOs spend billions of dollars of their marketing budgets on costly acquisition channels like paid search and paid social, and endless time trying to optimize them for ROI, organic search – which presents a greater recurring return on investment, and a lower cost per acquisition – is often an afterthought.

So why is this the case, what other channels are marketing leaders focusing on, and what do the most successful CMOs do to achieve success?

At the heart of our research is a desire to understand how confident marketing leaders are responding to the present situation, where their potential gaps and challenges lay, while simultaneously exploring strategies for success by learning from those that work for organizations that have significantly exceeded their top business goal by a significant margin.

This year, we have truly entered the digital-first age. My hope is that the insight found within this report, and the research results themselves, will help you navigate it.

EXECUTIVE SUMMARY

The Digital Future report, produced by Econsultancy in collaboration with DeepCrawl, is based on a survey of 366 professionals in marketing, data and technology.

The study examines the value of SEO and organic search in striving for top digital performance, in the specific context of the increased importance of digital channels since the onset of the pandemic. Despite CMOs and marketing leaders seemingly recognising this value, the study finds a performance gap showing up in organizations failing to make search a strategic priority.

Based on the responses of marketers from top-performing organizations, the report looks at *strategies* to successfully incorporate SEO into achieving wider marketing goals, the *challenges* frequently experienced by respondents, as well as *approaches* to overcome these barriers. Finally, the report looks to a future in which competitive CMOs will be digital-first, using search to their advantage to ensure stand-out digital experiences.

THE PANDEMIC SHINES A BRIGHTER LIGHT ON SEARCH

Due to recent trends that have forced widespread lockdowns across the planet, companies have had to reinvent entire business models around digital. At the same time, they've been rationalising traditional media budgets as they seek more cost-effective ways to understand shifts in customer behavior – all the while optimizing content for all their digital channels.

Both Google and SEO grew dramatically during the last financial crisis, and search has proved time and again to be an efficient, measurable form of marketing. Now, thanks to advances in reporting technology and AI-assisted analysis, it's an irreplaceable source of business intelligence that can enable firms to keep up with changing customer needs – serving every department right up to the C-suite.

SEO NEEDS TO BE MADE FIT FOR PURPOSE

Perhaps unsurprisingly then, the majority of executives felt that search performance is a key indicator of business health (78%). While SEO does require an upfront investment of resources, search engine rankings can persist for years. So, any pause in these activities or leaving a website dormant can bring to an end all the processes and workflows that organizations might have built. >

— This is also reflected by the fact that, according to nearly half (46%) of respondents, organic search influences over a quarter of their companies' revenues. But worryingly, while the stakes are significant, just one in 10 executives felt that their SEO efforts are "very effective" in meeting marketing goals. The study also brings into doubt whether some executives truly understand its impact, with 36% saying their ability to calculate the ROI from search engine optimization efforts are "poor".

CULTURAL CHANGE IS NEEDED NOW

Given the financial impact of the current pandemic, getting the best possible return on investments right now is crucial. The fact that so few of the respondents are positive about their companies' SEO efforts indicates that they need to have in place structured processes for proactively coordinating and overseeing quality.

The challenge here, as our research highlights, is that for nearly half the executives we surveyed (46%) SEO doesn't enjoy a high priority within the organization. At the same time, only two in ten felt that IT and tech teams fully understood marketing's priorities. More challengingly, a quarter of respondents told us that SEO is seen as "free" so it is not allocated any budget.

This underlines deeper problems that firms are experiencing. Often marketing lacks the authority to prioritize tech projects related to quality improvement and user experience. With little understanding from tech teams, crucial projects risk being delayed, if not pushed back indefinitely.

MARKETERS MIGHT BE SETTING THEMSELVES UP TO FAIL

While organic search drives significant revenues, organizations aren't always united when it comes to the prioritisation of projects that can improve their on-site performance. A good case in point is ASOS, which, in 2019, reported a pre-tax profit fall of 87%, citing "marketing changes to its website which led to a fall in web traffic". In short, a poor user experience led to a negative impact on rankings – not to mention the fact website users may have been frustrated by the user experience and bought less.

Our research indicates that firms may be putting themselves at the same risk of making mistakes. More than half (55%) have experienced a negative impact on marketing performance from a technical change made to their website. If errors are discovered, fixes need to be made immediately to limit the damage.

However, 36% cited delays in on-site changes as a top challenge. For some firms this could be due to the fact that the on-site experience isn't treated as a strategy priority (for 29% of executives). >

WE'LL NEED TO AUTOMATE TO SUCCEED

One area that will significantly help firms move forward in 2021 will be automation. Enterprises are facing a massive shift in how quickly brands need to react to search trends. Namely, they need to be equipped with real-time insights while the searches are taking place. Keeping up with real-time search manually just isn't possible, no matter how talented the marketing executive is.

But this isn't the only problem, professionals have too many repetitive tasks and processes to manage. Our study, for example, found that for nearly six in 10 (58%) improving on site performance is either largely or entirely a manual exercise. This takes valuable time away from doing things humans are far better at, which is being creative and strategic – those elements that can drive real business value.

A FOCUS ON TOP PERFORMERS

There are clearly challenges at play, and some of these are likely due to skills (or lack of them) and having the right processes and strategies in place. Indeed, we identified a group of “Top Performers” who had exceeded their top business goals over the last year, and we compared them to the overall average.

It was evident, for example, that SEO and on-site performance are much more top of mind for Top Performers than for the average marketer. Top Performers are also twice as likely to claim their marketing teams are “very knowledgeable” in both regards, and almost 2.5 times more likely to say they have a strategy for monitoring on-site performance that works efficiently.

WHAT DOES THE FUTURE HOLD?

Even prior to Covid-19, organizations were struggling to keep pace with rapidly evolving customer behaviors. Fortunately, one of the benefits of SEO is that it has moved from being considered a simple marketing channel to being an accurate reflection of the “voice of the customer” inside the organization.

This was demonstrated by the findings of this study, with respondents predicting that, going forward, on-site performance and SEO will play a key role – if not THE role – in approaching the new normal. For example, nearly all of the executives (96%) agreed that monitoring on-site performance will be crucial for mitigating risk and maximising opportunities for growth, and 90% also agreed that organic search will drive more revenue for business. ■

ABOUT DEEPCRAWL

DeepCrawl is the leading global enterprise Technical SEO platform. By identifying and monitoring key issues that could affect SEO performance, we empower our clients to optimize their websites for users and search engines alike – enabling our clients to drive further traffic and revenue from their organic channel.

We are trusted by 54% of enterprise brands as well as all six major global group advertising agencies, including Nestlé, Lenovo, Vodafone, GroupM, Zappos, Deliveroo, Made.com, and Canva among thousands of other companies.

ABOUT ECONSULTANCY

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and e-commerce through research, training and events. Founded in 1999, Econsultancy has offices in New York, London and Singapore.

Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and e-learning – all focused on helping individuals and enterprises get better at digital.

The subscription is supported by digital transformation services including digital capability programmes, training courses, skills assessments and audits. We train and develop thousands of professionals each year as well as running events and networking that bring the Econsultancy community together around the world.

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METHODOLOGY

The research in this report is based on a survey of 366 professionals with responsibility for their organization's marketing, data and technology, and was fielded in September and October 2020. Responses were fielded globally, including the UK (214 respondents), Europe (57), North America (35), Asia-Pacific (27) and the Middle East – Africa (16).

Respondents were drawn from Econsultancy's database, the outreach of sponsors and from a survey panel. Figures in some charts may not add up to 100% due to rounding.

In addition to the survey, leading industry figures were interviewed for their perspective on some of the key trends in the market.

As a result, we would like to thank the following executives for their kind contributions of time and insight, which we have featured in the report:

Alison Orsi	VP and CMO, EMEA	IBM
Bola Awoniyi	CEO and co-founder	Black Ballad
Chi Evi-Parker	Marketing, digital and e-commerce consultant	
Graham MacFadyen	Director of acquisition	Financial Times
Guy Magrath	Former CDO	Electrocomponents
Iain Noakes	VP of effectiveness and optimization	The Economist

If you have any questions about the research, please email Jim.Clark@xeim.com

KEY FINDINGS

THE VALUE OF DIGITAL IN 2020 AND BEYOND

2020 has been a year like no other. Between what the WHO is calling a once-in-a-century health crisis¹, and a resulting economic impact worse than experts anticipated, uncertainty is the word of the hour. According to the IMF, in 2020, GDP has fallen by as much as 8% in advanced economies and by 4.9% overall.²

It's no surprise that Covid-19 has touched every corner of the professional world. In August, Deloitte labelled the pandemic "a case of acute disruption"³ and, to be sure, the global crisis has thrown digital transformation from buzzword or long-term goal to an absolute necessity – fast.

But the significant impact that Covid-19 has had, and continues to have, on marketing, is no joke. To name just a few effects, social

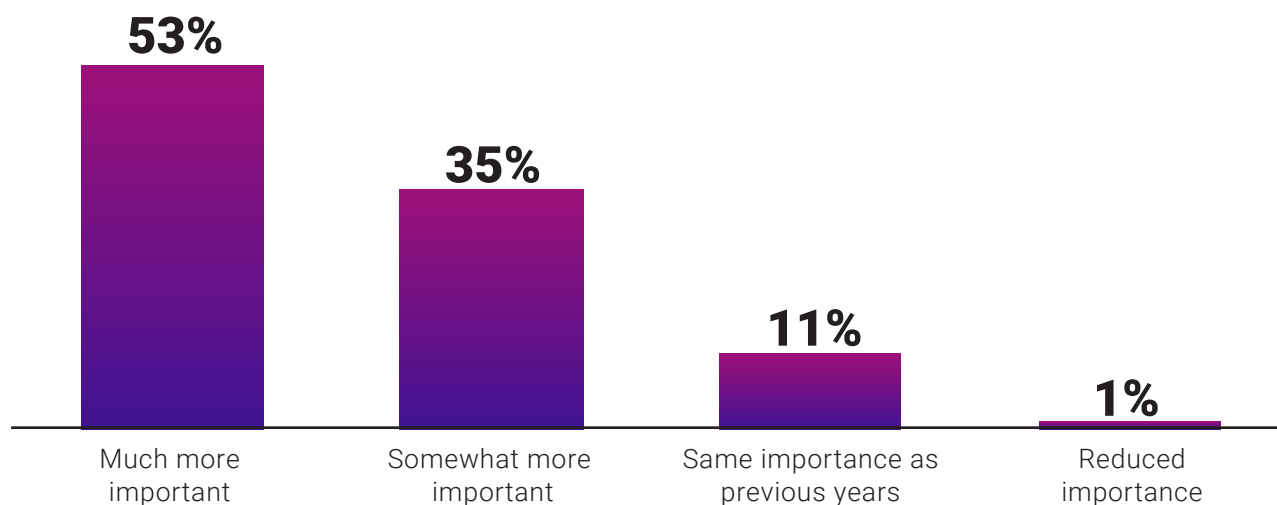
media budgets have increased,⁴ investment in tech to improve digital channels is up,⁵ and small business owners are fast-tracking their attempts to become digital-savvy.⁶

Consumers, too, are heading online in droves, with an adjusted 31.8% rise in retail e-commerce sales between Q1 and Q2 this year.⁷ As confirmed in July 2020 research by Econsultancy and Marketing Week, the majority of professionals have observed strong consumer trends in faster adoption of digital features (63%) and changes in customer journeys (56%).

Respondents to the survey certainly agree that this is a time of serious change.

The vast majority (88%) felt that the importance of digital channels had increased in their organization over the past year, including 53% who think that it has become "much more important" (Figure 1). >

FIG 1. IN YOUR ORGANIZATION, HOW HAS THE IMPORTANCE OF DIGITAL CHANNELS CHANGED OVER THE PAST YEAR?



¹ www.theweek.in/news/world/2020/08/22/covid-19-a-once-in-a-century-crisis-coul-end-in-under-2-years-who-chief.html

² www.imf.org/~/media/Images/IMF/Publications/WEO/2020/June/English/WEOarrowsJune2020.ashx?la=en

³ www2.deloitte.com/us/en/insights/topics/digital-transformation/digital-transformation-COVID-19.html

⁴ http://cmosurvey.org/wp-content/uploads/2020/06/The_CMO_Survey-Highlights-and_Insights_Report-June-2020.pdf

⁵ www.merkleinc.com/emea/thought-leadership/white-papers/cer-covid-19-edition

⁶ <http://tech.co/crm-software/best-customer-retention-strategies>

⁷ www.census.gov/retail/mrts/www/data/pdf/ec_current.pdf

COVID'S IMPACT

Fortunately, nine out of 10 (89%) respondents feel that their organization's response to the Covid-19 pandemic was at least somewhat effective (Figure 2). And, in the face of adversity, many organizations have experienced a productive reassessment of their digital channels.

Throughout the pandemic, businesses have had to cancel plans for face-to-face interactions with their customers. For B2B organizations, this has meant that key conferences and summits have had to be either shelved or adapted.

In March, IBM had to make the call to cancel a flagship annual event. With eight weeks' notice to evolve the event into a digital experience, the firm's CMO Alison Orsi and her team were pleasantly surprised by the necessary change:

"What it really meant was that we were able to reach a much larger audience – in fact five times larger – than would have been able to attend face-to-face. We had over 100,000 people register to attend the event, which was phenomenal, and a really fantastic set of engagement. We're finding the pipeline that we're getting from online events is growing (by) double digits, and we're getting to a tipping point where they're replacing [physical] events."

IBM's experience is consistent with the 96% of respondents who agree (generally, to a strong degree) that the Covid-19 pandemic makes digital performance more important than ever (Figure 3).

Marketing, digital and e-commerce consultant Chi Evi-Parker, who has viewed the pandemic from a retail perspective agrees: "When you've got no physical stores, the >

FIG 2. IN YOUR OPINION, HOW EFFECTIVE WAS YOUR ORGANIZATION'S RESPONSE TO THE COVID-19 PANDEMIC?

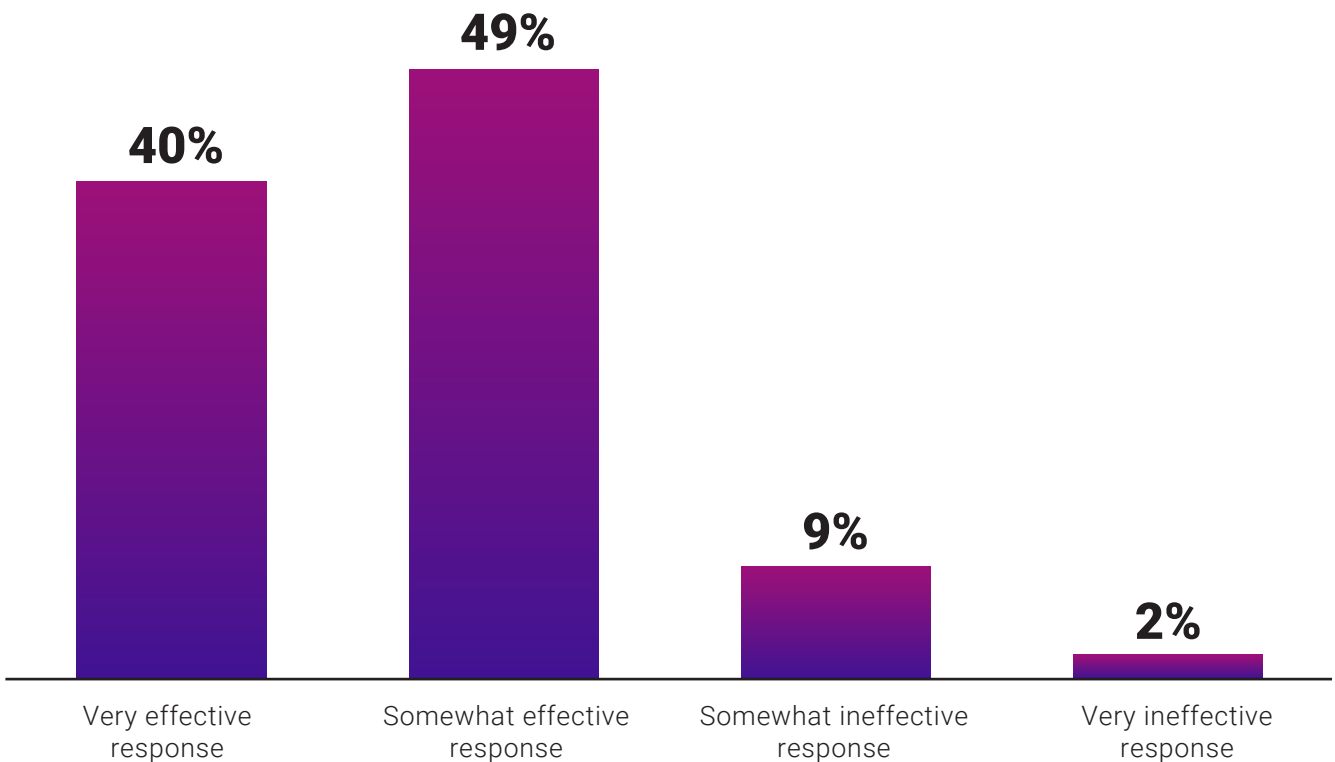
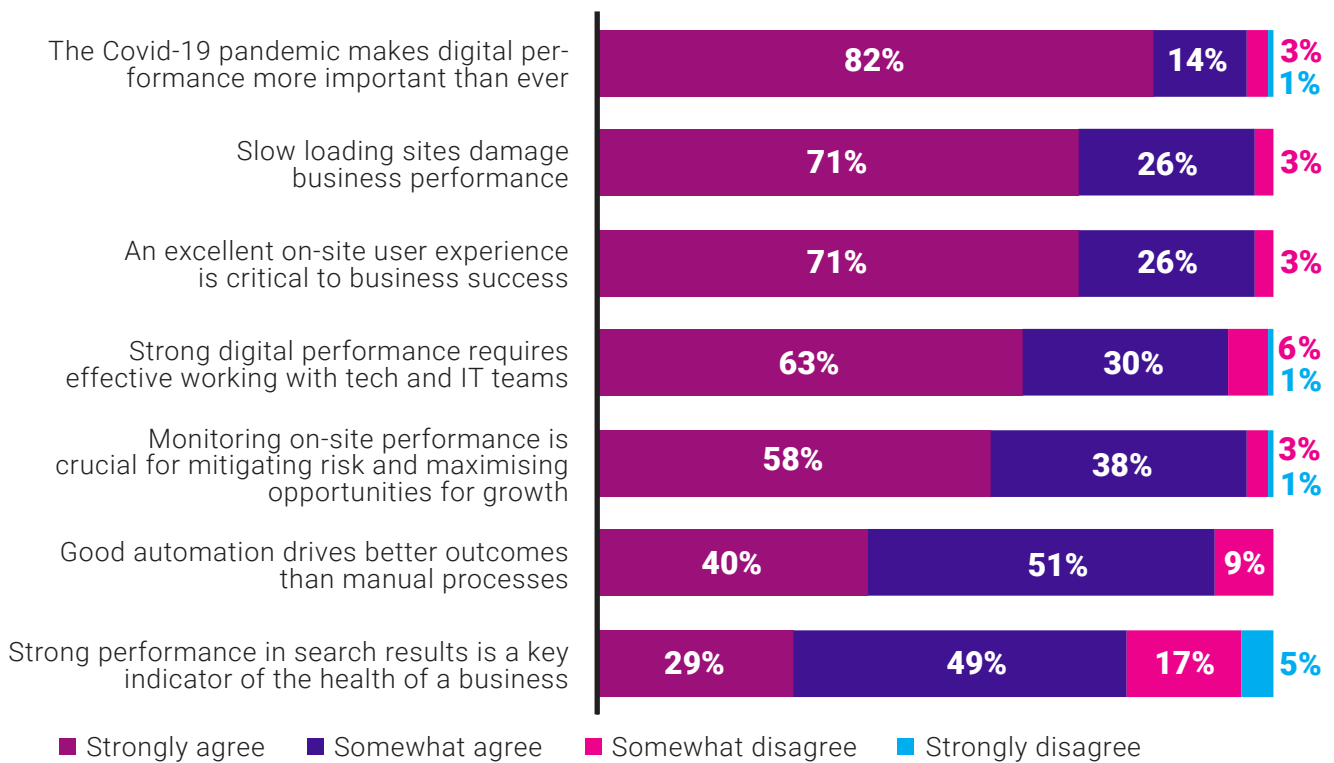


FIG 3. TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?



digital focus becomes absolutely paramount. Retailers have been thinking of what they can do to try and replicate the store experience to a customer who isn't going to be face-to-face."

At the Financial Times, the impact of the crisis has been clear, but not unexpected for the newspaper's Director of Acquisition Graham MacFadyen:

"Print circulation, it'll be no surprise, has taken a bit of a hit. It has accelerated thinking at the FT about our future plan – or, maybe, pulled in a horizon that already existed. If we had a ten-year plan around the decline of print, that may be a five-year plan after the crisis."

THE FUTURE OF DIGITAL

MacFadyen expresses a sentiment that has been resounding among marketing experts. Beyond placing unprecedented weight on digital channels, the pandemic has shined light on a pre-existing necessity of top digital performance.

Bola Awoniyi, Co-Founder of new digital lifestyle platform Black Ballad, sees the real-life behaviors of younger generations as

an indicator of the reality of digital. He has suggested that, if marketers observe those between the ages of 14 and 25, and "really look at how they've adjusted to life in the pandemic", they will notice that their behavior hasn't changed much – "they already spend all of their time online".

In 2015, McKinsey observed that "digitisation [was] giving rise to a new form of competition."⁸ Former Electrocomponents CDO Guy Magrath notes that past predictions like this have certainly come true, and that while it's not too late to adapt, the clock is ticking:

"If you're not embracing this world, which Covid has only accelerated by about 10 years, you're going to fail."

The pandemic has clearly exacerbated an already competitive digital landscape. It would appear that marketers are aware of the standard needed in order to keep up – virtually all (97%) agreed that an excellent on-site user experience is critical to business success, and the same number feel that slow-loading sites >

⁸ www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/competition-at-the-digital-edge-hyperscale-businesses

damage business performance (Figure 3). Beyond being a necessary concern for CMOs, digital performance – or lack thereof – has a clear cost. BCG data estimates that every second of additional page load time costs \$9,000 per million page views each month.⁹ As such, it's easy to see the potential cost for larger brands with significant traffic volumes.

Rather than simply being the responsibility of tech teams, ensuring the quality of digital channels' performance is a question of whether organizations feel confident in their ability to compete in future. Fortunately, nearly three-quarters (74%) of respondents felt at least somewhat confident in their ability to respond to the threat of new start-ups and digital-first brands (Figure 4).

For the remaining quarter of respondents who are "somewhat worried" (21%) or "very worried" (5%) about their ability to respond to change, experts encourage a positive outlook. After all, having pressed Pause on the professional world, the pandemic has provided a unique opportunity for organizations to take stock and put their best foot forward into a digital-first future.

The speed of change was a recurring theme at this year's Festival of Marketing. During the



View from the expert

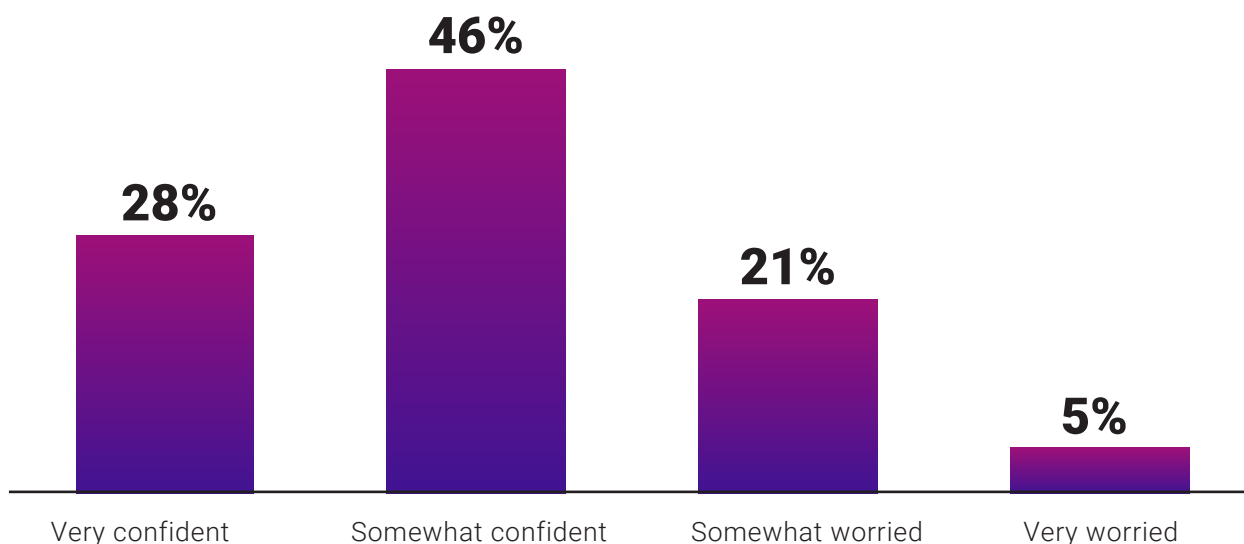
WE HAVE ALL THE TIME IN THE WORLD OVER THE NEXT 12 MONTHS TO MAKE THE DIGITAL HABITS THAT WE ARE BEING FORCED INTO NOW, BECOME OUR REGULAR REALITY. IF YOU'RE NOT ADJUSTING TO THOSE REALITIES, YOU'RE DOING SO TO THE DETRIMENT OF YOUR BUSINESS."

Bola Awoniyi
CEO and co-founder, Black Ballad

online conference, speaker Professor Scott Galloway remarked:

"Online grocery has accelerated (over the past) six years, US government spending has accelerated to where it was meant to be in 22 years, e-commerce was growing 1% a year as a percentage of all retail and in 2020 18% of all retail was through digital channels. In eight weeks, it jumped to 28%, and it doesn't look like it's going back."¹⁰ ■

FIG 4. HOW WORRIED OR CONFIDENT ARE YOU IN YOUR ORGANIZATION'S ABILITY TO RESPOND TO THE THREAT OF NEW START-UPS AND DIGITAL-FIRST BRANDS?



⁹ www.bcg.com/publications/2020/real-cost-poor-website-quality

¹⁰ www.festivalofmarketing.com/festival-blog-2020/a-crisis-is-a-terrible-thing-to-waste

THE PERFORMANCE GAP

In the previous section, we saw that digital professionals have responded positively to the challenges of 2020. Marketing leaders understand what's at stake when it comes to digital, and feel ready to take on the challenge. However, a deeper look at the responses reveals that, for a number of businesses, there are problems beneath the surface.

The performance gap that we will discuss below here begs the questions: is marketing leadership simply under the illusion that they are doing what needs to be done? Or, is it simply not giving the fundamentals of digital performance the attention they deserve, and thus not building the strong digital foundations that would make the difference between success and failure in the coming years?

Among the organizations surveyed, only a small minority (14%) claimed to have exceeded their top business goal by a significant margin. While around half (55%) said that they either "met" or "narrowly exceeded" this goal, three in 10 (31%) said either that they missed their top business goal to some extent (*Figure 5*).

In this report, we use the term 'Top Performers' to refer to the 14% of the respondents who said that they exceeded their top business goal by a significant margin, and 'Mainstream' to refer to all other respondents. Taking a look at these leaders highlights possible areas of best practice where adoption is higher for Top Performers compared to Mainstream respondents.

With that in mind, what's stopping more organizations from exceeding expectations? >

FIG 5. THINKING ABOUT THE PAST YEAR'S PERFORMANCE (I.E. 2019 BEFORE COVID-19), WHICH STATEMENT BEST DESCRIBES HOW YOUR COMPANY PERFORMED AGAINST ITS TOP BUSINESS GOAL?

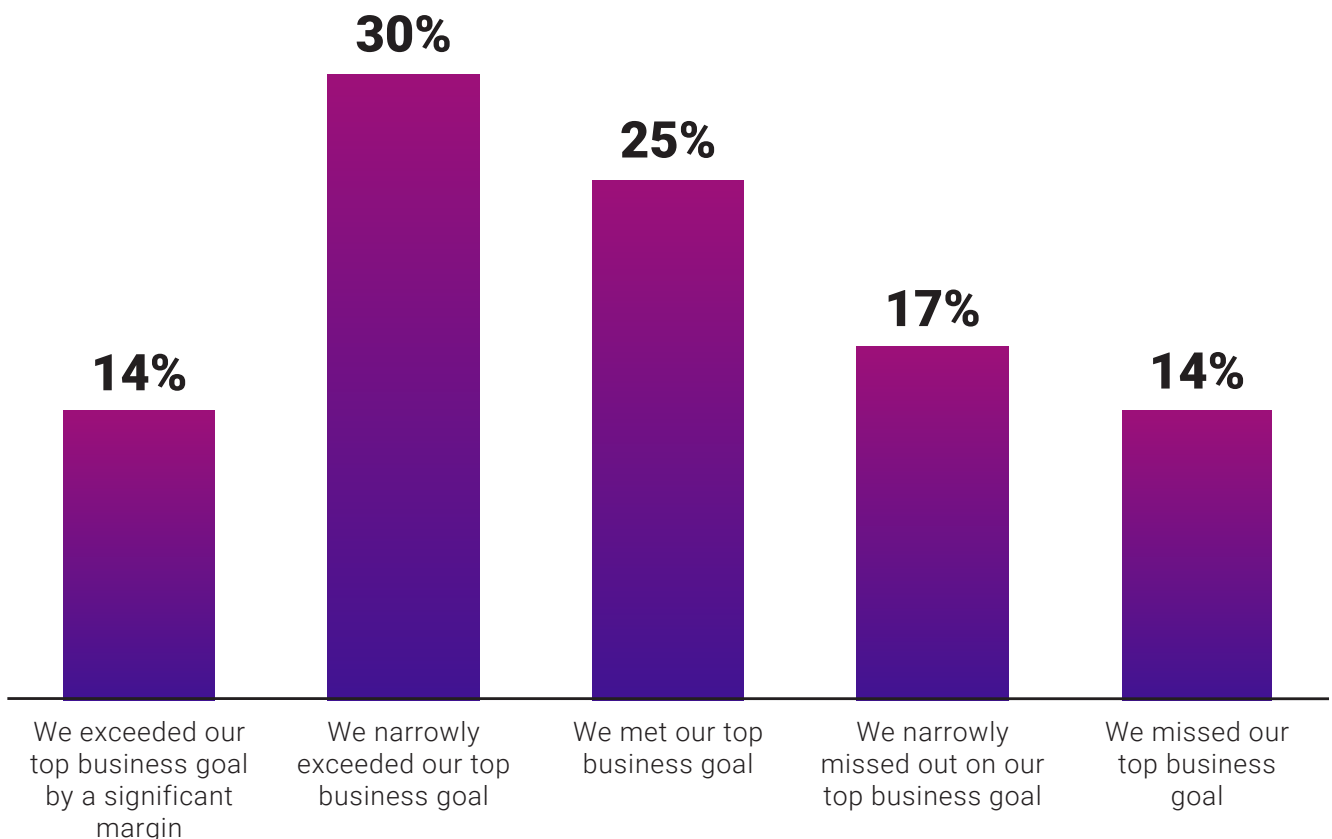
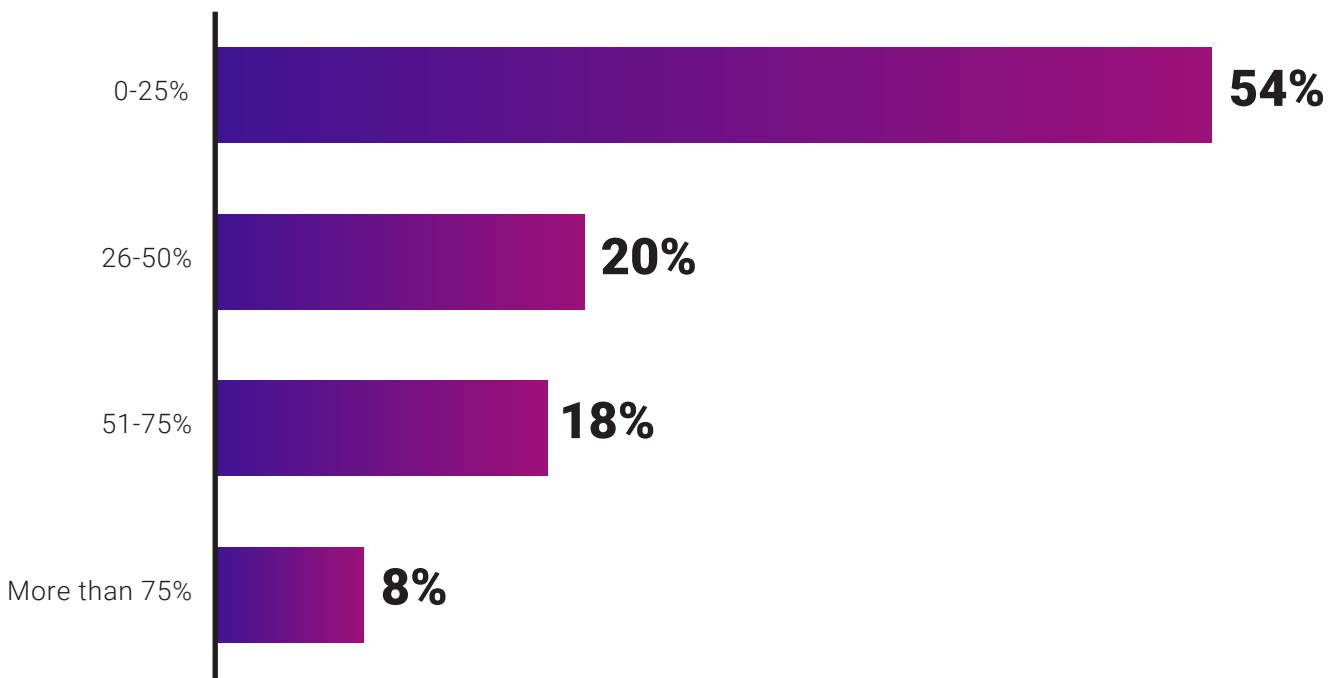


FIG 6. APPROXIMATELY, HOW MUCH OF YOUR ORGANIZATION'S REVENUE IS INFLUENCED BY ORGANIC SEARCH?



WHERE ORGANIZATIONS ARE FALLING DOWN

Having shown an awareness of the importance of the finer points of digital performance, as seen in *Figure 3*, the survey data suggests there is a level of disconnect within organizations between these core issues and overall strategic goals.

This disconnect is particularly clear when it comes to SEO and organic search, which is clearly vital to performance. As demonstrated in *Figure 6*, nearly half (46%) of respondents estimated that organic search influenced more than a quarter of their organization's revenue. More than one-quarter (26%) think it accounts for more than 50% of their organization's revenue. Furthermore, as we've seen earlier, 78% agree with the statement that "Strong performance in search results is a key indicator of the health of the business" (*Figure 3*).

Notably, search results performance as an indicator of digital health is particularly important to the organizations identified

as Top Performers. Among this group, 42% strongly agreed that strong performance in search results is a key indicator of the health of a business, compared to only 28% of remaining organizations felt the same. >

42%

OF TOP PERFORMERS STRONGLY AGREED THAT SEARCH RESULTS PERFORMANCE IS A KEY INDICATOR OF BUSINESS HEALTH COMPARED TO ONLY 28% OF THE MAINSTREAM

Despite this, overall, only 13% of executives report that their organization's current search engine optimization efforts are "very effective" in meeting marketing's goals. And, while around half (58%) think they are "somewhat effective", a quarter feel that their SEO efforts are "somewhat" (21%) or "very" (8%) ineffective at meeting goals.

In part, this performance gap shows up as a difficulty to calculate the ROI of search engine optimization.

Just 8% of respondents labelled their organization's ability to calculate the return on investment from its search engine optimization efforts as "excellent", with almost four in 10 considering it as either "poor" (26%) or "very poor" (10%) (Figure 7). Separately, >

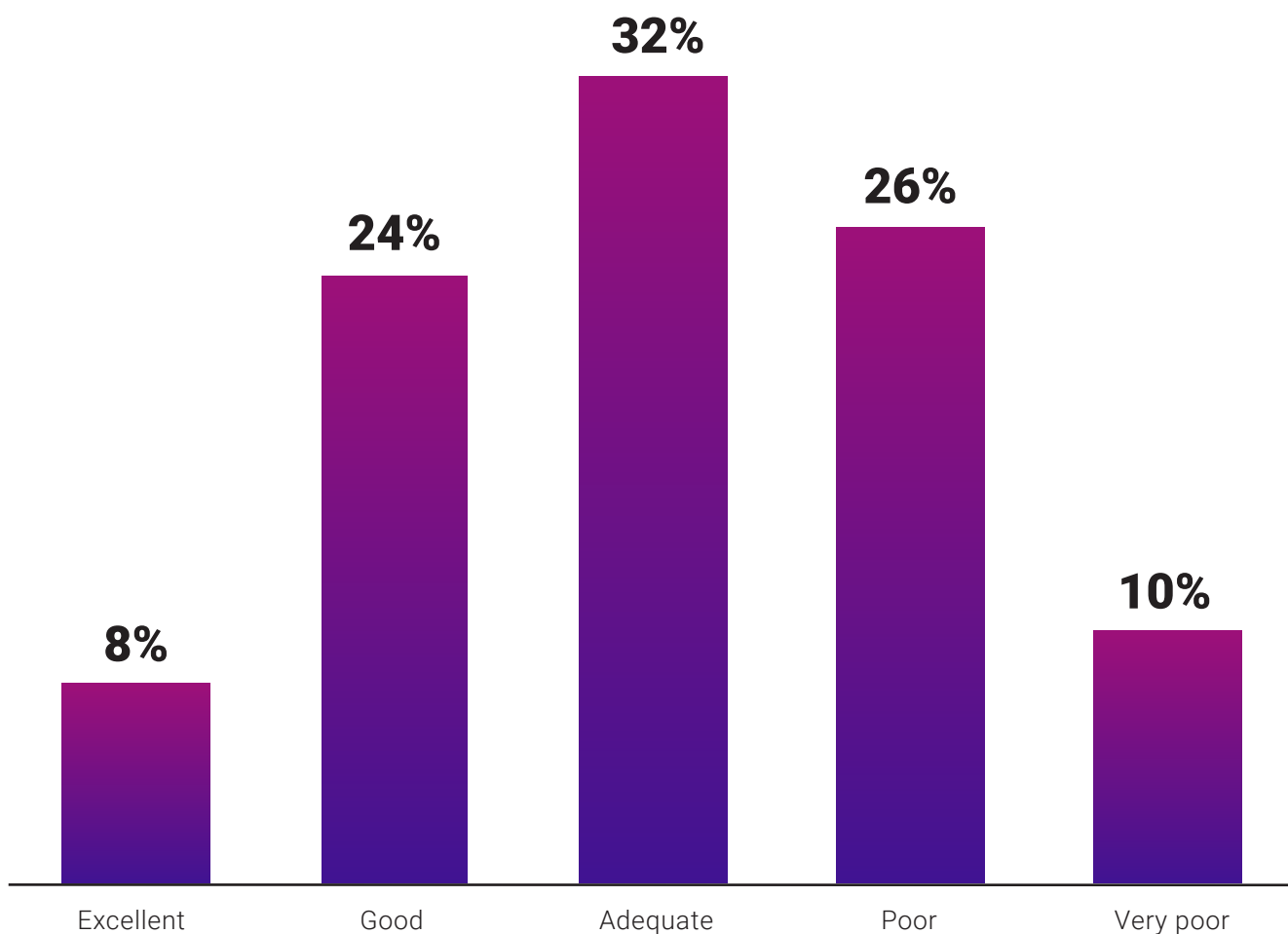


View from the expert

IT'S HARD TRYING TO CALCULATE THE ROI ON ANY ONE INDIVIDUAL ELEMENT OF THE MARKETING STACK. IT COMES DOWN TO HOW EFFECTIVE YOUR ATTRIBUTION MODELS ARE, AND THE NIRVANA OF MULTI-TOUCH ATTRIBUTION IS STILL UNFORTUNATELY SOME WAY OFF."

Alison Orsi
VP and CMO, IBM EMEA

FIG 7. HOW DO YOU RATE YOUR ORGANIZATION'S ABILITY TO CALCULATE THE RETURN ON INVESTMENT FROM ITS SEARCH ENGINE OPTIMIZATION EFFORTS?



recent BCG data has highlighted the clear link between factors such as page size and server load time, and the financial health of a business. On average, organizations could increase the effectiveness of their marketing spend by 21% by optimizing such factors.¹¹

The data also indicates that organizations are struggling to make use of automation in the optimization of digital channels (Figure 8). Just 6% of respondents said that automation is fully deployed for improving site performance at their organization, with around 58% saying that improving on-site performance is largely or totally manual at their organization.

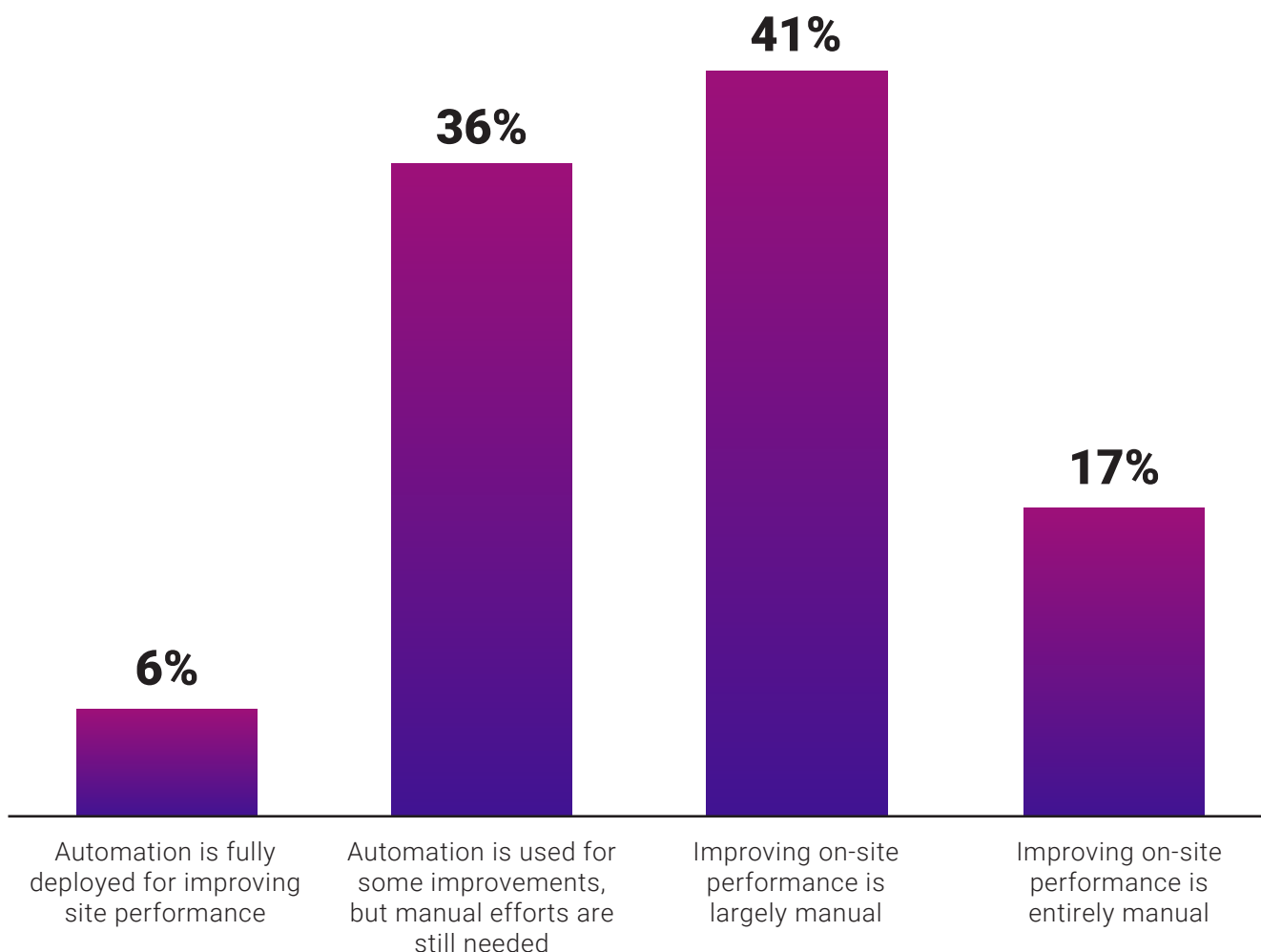
The evidence is clear that automation

should be strived for if organizations want the best results from their SEO efforts. Recent research by IBM found that organizations classed as 'automation achievers' have seen more than double the profitability, revenue growth and efficiency of their peers over the past three years, and are set to continue to outshine others for the next three.¹²

BRIDGING THE GAP

Marketing experts agree that what's needed is a holistic understanding of the link between overall marketing goals and the fundamentals of SEO and site performance. At Black Ballad, this relationship has >

FIG 8. WHICH OF THE FOLLOWING STATEMENTS BEST DESCRIBES HOW YOU IMPROVE YOUR ON-SITE PERFORMANCE FOR SEARCH ENGINE OPTIMIZATION?



¹¹ www.bcg.com/publications/2020/real-cost-poor-website-quality

¹² www.ibm.com/downloads/cas/O17AWNv6

been clear. Bola Awoniyi explains: “When one part of the business sneezes, the rest of it might shiver [...] When we look at optimizing the share widgets at the beginning and end of an article, or how we can better technically surface share assets in our newsletter, there are technical elements to those things, but ultimately, those are part of

strategic marketing initiatives.”

Fortunately, more than two-thirds of respondents feel that their marketing team is either ‘somewhat’ (49%) or ‘very knowledgeable’ (20%) with regards to improving SEO performance (Figure 9). Unfortunately, the remaining 31% report that their marketing teams have either ‘little’ (24%) or ‘almost no knowledge’ (7%) in this area. >

FIG 9. HOW KNOWLEDGEABLE IS YOUR MARKETING TEAM WITH REGARDS TO IMPROVING SEO PERFORMANCE?

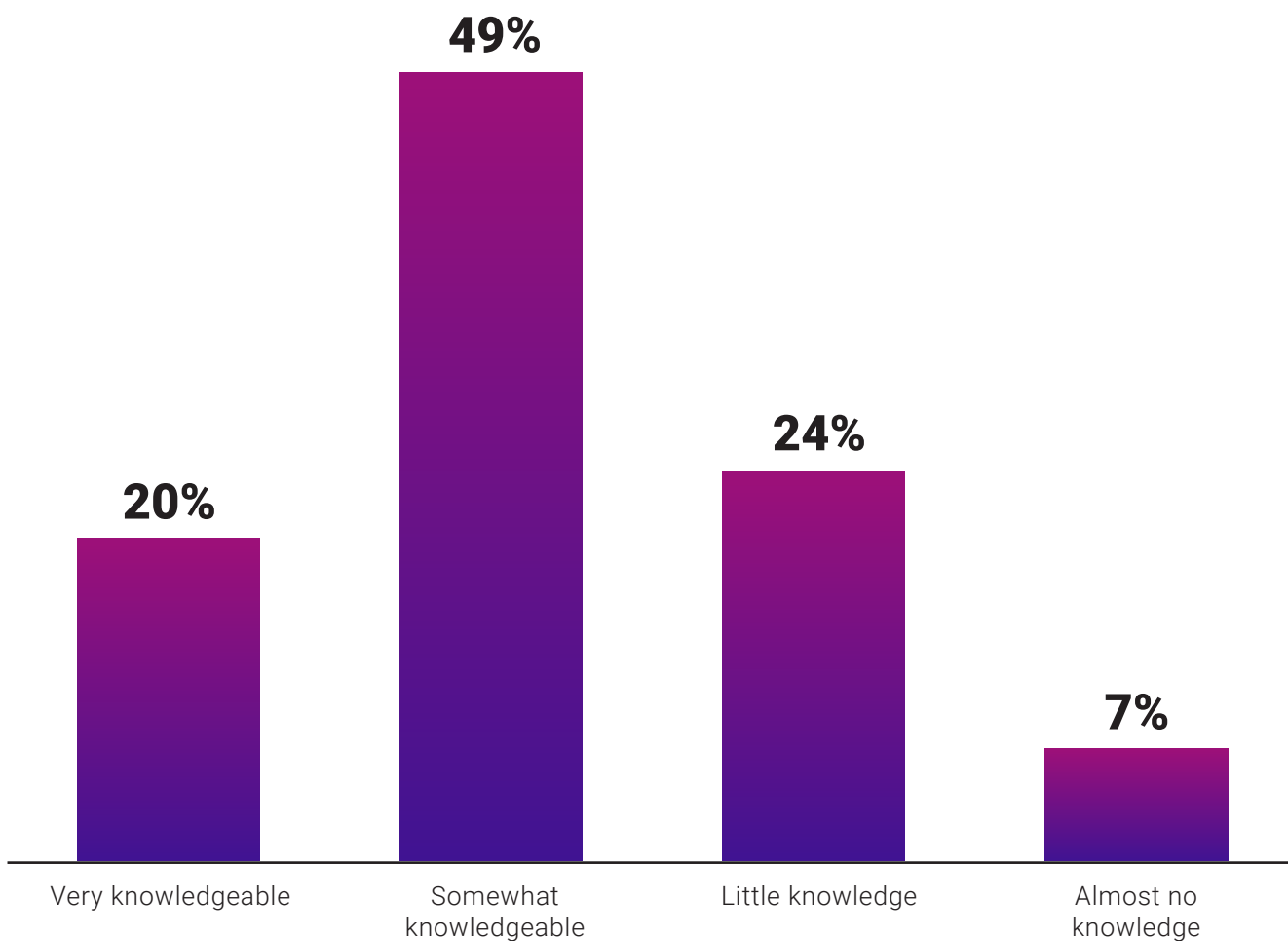
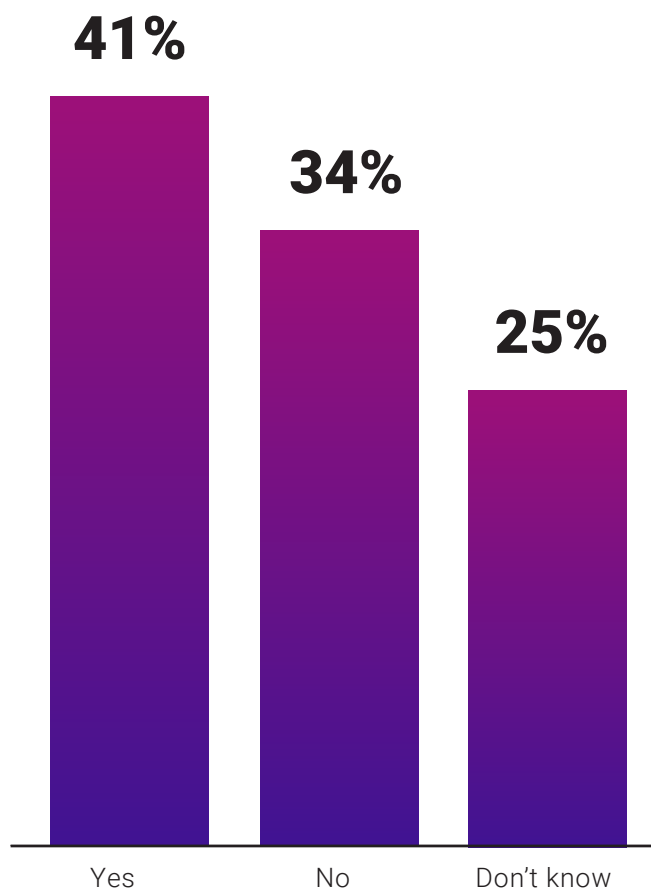


FIG 10. HAVE TECHNICAL CHANGES TO YOUR WEBSITE EVER RESULTED IN A NEGATIVE IMPACT ON MARKETING PERFORMANCE?



At The Economist, VP of effectiveness and optimization, Iain Noakes, has seen why SEO requires marketing expertise:

“There’s a tricky balance between being super SEO friendly and actually having the trust and curation of the brand – the authority and the wit and the charm of the brand – that people are willing to pay a premium subscription for.”

One key indication of the current performance gap is the number of sites being impacted by technical challenges (Figure 10). Indeed, 41% of the organizations surveyed, report that technical changes to their website have had negative impacts on their marketing performance in the past.

The challenges presented by the disconnect between the marketing and tech teams will be discussed later in the report. But the gap in performance of SEO and organic search indicated by respondents and manifesting in unexpected technical barriers, begins with the misconception that these factors are not within the strategic responsibility of marketing leadership. ■



View from the expert

FOR MARKETERS WHO WANT TO AVOID ONLINE DIGITAL, THE QUESTION IS: WHERE DO YOU SEE YOURSELF TEN YEARS FROM NOW, AND WHAT DO YOU SEE YOUR JOB BEING? THERE’S GOING TO BE A GENERATION OF MARKETERS WHO HAVE LEARNED TO CODE AT SCHOOL, AND IT WILL BE BASIC KNOWLEDGE. WITHOUT ANY INTEREST IN DIGITAL, YOU’RE GOING TO BE OBSOLETE IN FIVE TO TEN YEARS.”

Chi Evi-Parker,
Marketing, digital and e-commerce consultant

STRATEGIES FOR SUCCESS

Having established that digital performance deserves its place alongside other strategic goals, we may rightly ask, what else is important to those leading marketing departments right now?

According to respondents, brand strength/loyalty is the top strategic marketing concern for businesses (53%), virtually tied with social media (52%). They are followed by, user experience (41%) and email (37%), SEO was the fifth-most strategically important marketing area for respondents (36%) (Figure 11).

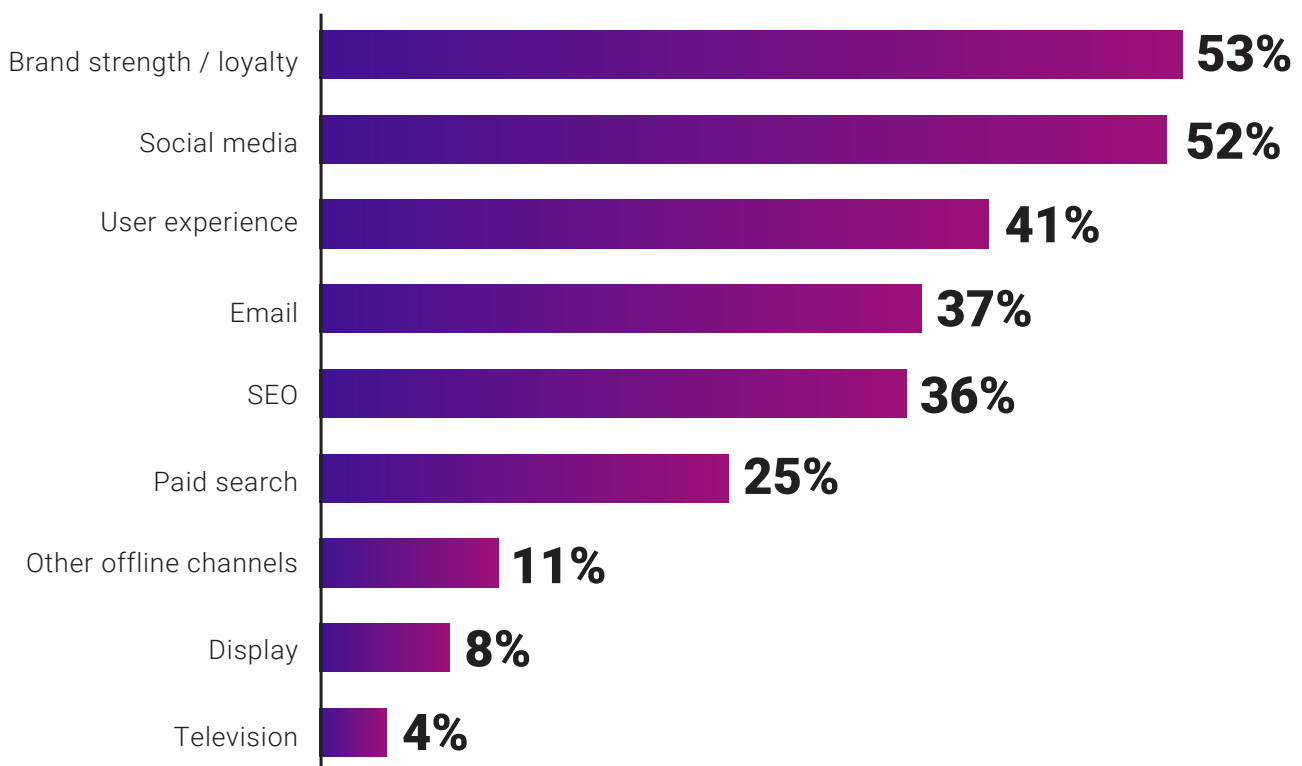
However, the survey data suggests that SEO should be more of a strategic priority. Taking a look at how top performing organizations' responses compared with those in the Mainstream, it's clear that a dedicated strategy for SEO and organic search is strongly correlated with success. For example, Top Performers were:

- **Twice as likely** (14% vs. 7%) to estimate that **more than 75% of their revenue** is influenced by organic search.
- **12% more likely** to have SEO efforts that are at least somewhat **effective at meeting marketing's goals** (81% vs. 69%).
- **Twice as likely** to rate their organization's **ability to calculate the ROI** from search engine optimization as at least good (58% vs. 29%).

Efforts at the Financial Times certainly support the fact that marketing leaders are keeping SEO top of mind. As Graham MacFadyen notes:

"What we've been trying to do at the FT is balance the three pillars of owned, earned, and paid media. While paid media has been doing a lot of the work, in the last few years we've been trying to balance that with a more sophisticated, nuanced approach to organic search." >

FIG 11. RIGHT NOW, WHICH OF THE FOLLOWING MARKETING AREAS ARE THE MOST STRATEGICALLY IMPORTANT FOR YOUR BUSINESS?



HOW TOP PERFORMERS APPROACH SEO

Looking specifically at how organizations are approaching SEO right now, marketers at leading organizations display a closer connection to SEO and on-site priorities than do marketers at mainstream organizations, with their responses to the survey highlighting key best practices for improving digital performance.

Top-performing respondents were:

- **Twice as likely** to say that their marketing team is **very knowledgeable with regards to improving SEO performance** (36% vs. 18%).
- **More than 2.5x more likely** (28% vs. 11%) to have a **strategy for monitoring on-site performance** that is working efficiently.

Conversely, the largest share (51%) of respondents overall described their organization as having a strategy for monitoring on-site performance, but that this process needs improvement.

And, while overall the majority (58%) of >

55%

OF TOP PERFORMERS HAD A “VERY EFFECTIVE” RESPONSE TO THE COVID-19 PANDEMIC, COMPARED TO 37% OF THE MAINSTREAM.

47%

OF TOP PERFORMERS ARE “VERY CONFIDENT” IN THEIR ABILITY TO RESPOND TO THE THREAT OF NEW START-UPS AND DIGITAL-FIRST BRANDS, COMPARED TO 25% OF THE MAINSTREAM.



View from the expert

YOU SOMETIMES SEE A ‘WINNER TAKES ALL’ DYNAMIC IN BUSINESSES STRIVING TO OWN THEIR OWN DOMAIN. IT’S THE SAME FOR US AT THE FT – WE WANT TO BE THE BEST IN THE WORLD AT WHAT WE DO, AND IF THAT MEANS DEFINING WHAT WE DO MORE NARROWLY, THEN THAT’S PROBABLY THE RIGHT DIRECTION FOR US. IF WE SAID WE WANT TO BE THE BEST AT ‘NEWS’, OR EVEN ‘BUSINESS NEWS’, THAT’S FAR TOO BROAD. WE WANT TO PICK OUR TERRITORY AND BE CLEAR ABOUT DOMINATING THAT TERRITORY.”

Graham MacFadyen
Director of acquisition,
Financial Times

respondents claimed that their marketing team is somewhat knowledgeable about the factors improving on-site user experience, top-performing organizations were more likely to have a marketing team that's very knowledgeable about such factors (27% vs. 16%).

Marketing experts are certainly keeping on-page factors top of mind. In Guy Magrath's words:

"Your site needs to be technically crawlable and definable via Googlebots. It needs to be mobile-first, fully responsive, and not have duplicated pages (e.g. we've got mobile pages and desktop pages)."

For Chi, an understanding of certain on-site factors can be akin to wider marketing goals from a customer experience point of view:

"I tend to wonder what site performance does to the customer in terms of their measures [of experience] as opposed to the actual site metrics. So, does that impact the bounce rate on that page? What's the dwell time? What's the scroll? Those are the kind of metrics that, as a marketer, I've previously measured."

WIDE-RANGING BENEFITS

Having demonstrated that organizations exceeding their business goals are more likely to be take a leading approach to SEO and organic search, the survey also found that these Top Performers are better prepared for current and future adversity.

As well as being more likely to describe their organization's response to the Covid-19 pandemic as "very effective" (55% vs. 37%), respondents from top-performing businesses were also nearly twice as likely (47% vs. 25%) to be "very confident" in their



View from the expert

SEARCH IS VERY IMPORTANT TO US. WE GET A LOT OF NATURALLY DIRECT TRAFFIC TO THE SITE, AND A LOT OF IT IS STILL ANCHORED TO KEY CORE BRAND TERMS."

Iain Noakes
VP of effectiveness and optimization,
The Economist

organization's ability to respond to a competitive future.

Brand building is a key area in which site performance can be significant to these wider goals. Respondents identified this as their top strategic priority right now (*Figure 11*), and, fortunately, SEO strategy is bound to fortify brand strength in turn.

Identifying keywords, for example, is as much an exercise in distilling the vision for a brand as it is in site optimization, and ensuring that your brand gets noticed for all the right reasons.

This has certainly been the case at Black Ballad, with Bola Awoniyi finding that the platform's "dedicated focus on a particular demographic" has allowed it to build a brand.

Even the Financial Times, with its international reputation and large audience size, is aware that focusing on valuable customer segments is something it needs to do – even if it involves being more refined in its target audience. ■

CHALLENGES TO OVERCOME

Despite the clear need for a strategic prioritisation of SEO and organic search, there are inevitably barriers that organizations may face in attempts to make this happen.

To begin with, the top challenge experienced by those taking the survey is the reality that SEO is not a high enough priority in their organization (*Figure 12*). Nearly half (46%) of respondents said that they've faced this, inevitably linking to the challenge that SEO is seen as "free", so does not win budget (24%).

BCG outlines why this lack of priority and budget tends to occur regarding on-site performance:

"Quality improvement and user-experience projects are generally run from the marketing department, but marketing lacks the authority to prioritize the many



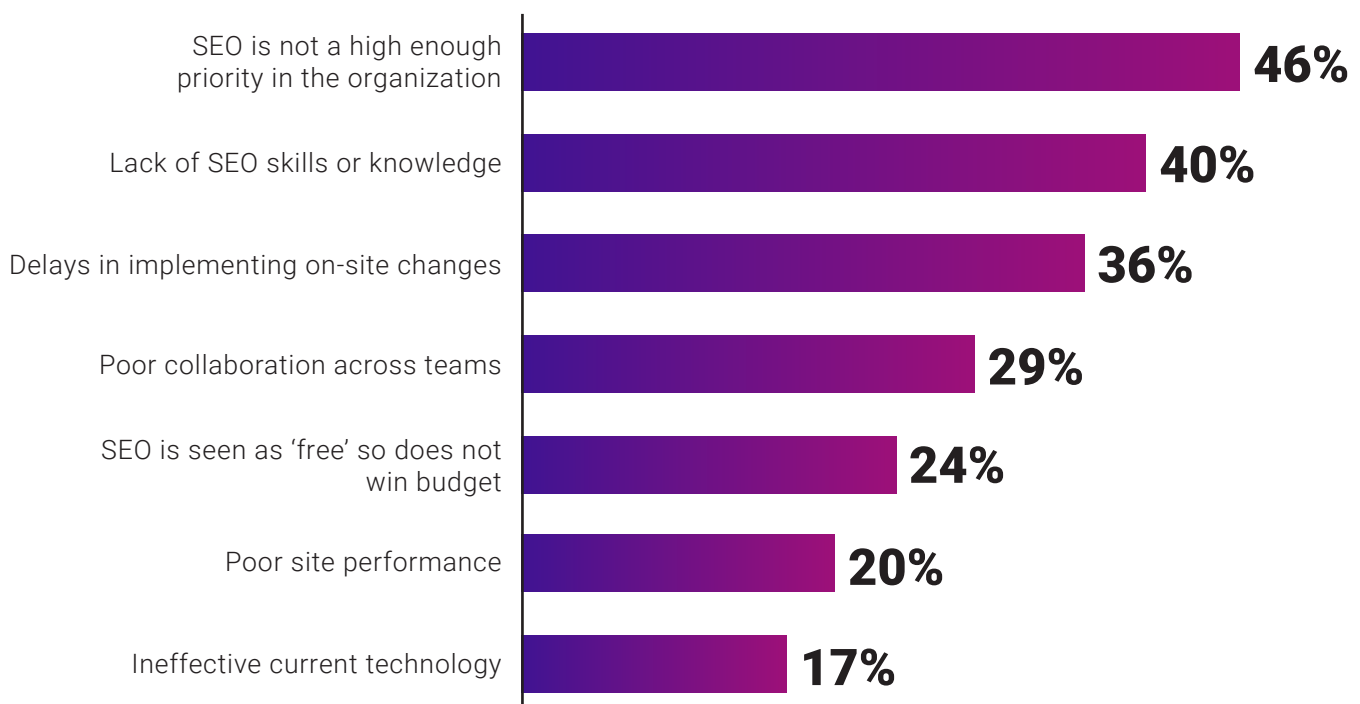
View from the expert

I DON'T NEED MARKETERS TO BE ANALYSTS AND HAVE MATHS OR STATS FIRSTS, BUT I'M HAPPY IF THEY HAVE THE CONFIDENCE AND THE LANGUAGE TO INTERACT WITH THE DATA SCIENCE TEAM. YOU DON'T NECESSARILY NEED A TRANSLATOR IN THE MIDDLE OF THAT CONVERSATION IF BOTH SIDES ARE GOOD AT LISTENING."

Graham MacFadyen
Director of acquisition,
Financial Times

tech projects underway at any given time in the enterprise. As a result, website quality projects do not get priority."¹³ >

FIG 12. WHICH OF THE FOLLOWING CHALLENGES HAVE HELD YOUR ORGANIZATION BACK WHEN IT COMES TO IMPROVING YOUR SEARCH ENGINE OPTIMIZATION RESULTS?



¹³ https://image-src.bcg.com/Images/BCG-The-Real-Cost-of-Poor-Website-Quality-Apr-2020-R_tcm9-245366.pdf

This hits on an issue at the core of why organizations might be struggling to ensure top digital performance through SEO and on-site factors – i.e., a lack of cooperation between the marketing and tech teams.

ALIGNING MARKETING AND TECH

For some years, marketers have discussed the disconnect between marketing teams and technical teams as a barrier to workflow. As early as 2013, Harvard Business Review was writing about “the dangerous tension between CMOs and CIOs”.¹⁴

Poor collaboration between these teams is an issue still faced today by respondents to our survey. It shows up as a challenge regarding SEO (29%), as well as improving the on-site experience (Figure 13), with 23% experiencing poor collaboration and an equal number reporting that tech/IT does not prioritize the on-site experience.

Oftentimes, misalignment between



View from the expert

SOMETHING HAS TO GIVE, BECAUSE MARKETERS AND TECH TEAMS WORK IN QUITE DIFFERENT WAYS. MAKE SURE THAT YOU’RE BRIEFING, MAKING PROPOSALS AND COMMUNICATING IN THE WAY THAT THEY UNDERSTAND – GO AND SIT WITH THEM AND ACTUALLY UNDERSTAND HOW THEY DISSECT AND BREAK APART THE BEST SOLUTION.”

Chi Evi-Parker
Marketing, digital and
e-commerce consultant

marketing teams and tech teams is due to communication issues in both directions. Just 21% of respondents felt that technical and IT teams at their organization have a >

FIG 13. WHAT ARE THE MOST SIGNIFICANT BARRIERS FOR YOUR ORGANIZATION WHEN IT COMES TO IMPROVING THE ON-SITE EXPERIENCE?



¹⁴ <https://hbr.org/2013/08/the-dangerous-tension-between>

full understanding of marketing's priorities (Figure 14) and even fewer (15%) felt that marketing has a full understanding of the processes used by their tech and IT teams (Figure 15).

Marketing experts are finding ways to overcome collaboration barriers, focusing on language and proactive listening.

THE RISK OF TECHNICAL CHANGES

According to the survey, four in 10 (39%) of the respondents cite delays in implementing on-site changes as one of their top challenges (Figure 13), and three in 10 (29%) say that on-site experience is not a strategic priority.

These are just a few examples of issues that can arise in the process of making >



View from the expert

WE'VE MOVED AWAY FROM HEAVY PRESENTATION DECKS TO IDEALLY GETTING THINGS DOWN TO TWO PAGES, AND SAYING: WHAT IS THE PROBLEM, WHAT ARE WE TRYING TO RESOLVE, WHAT ARE THE DECISIONS WE NEED TO MAKE TODAY. GET A BUNCH OF PEOPLE IN [THE ROOM] RATHER THAN TAKE IT AROUND SEVERAL STAGES OF THE BUSINESS."

Iain Noakes
VP of effectiveness and optimization,
The Economist

FIG 14. WHAT LEVEL OF UNDERSTANDING DO YOUR TECHNICAL AND IT TEAMS HAVE OF MARKETING'S PRIORITIES?

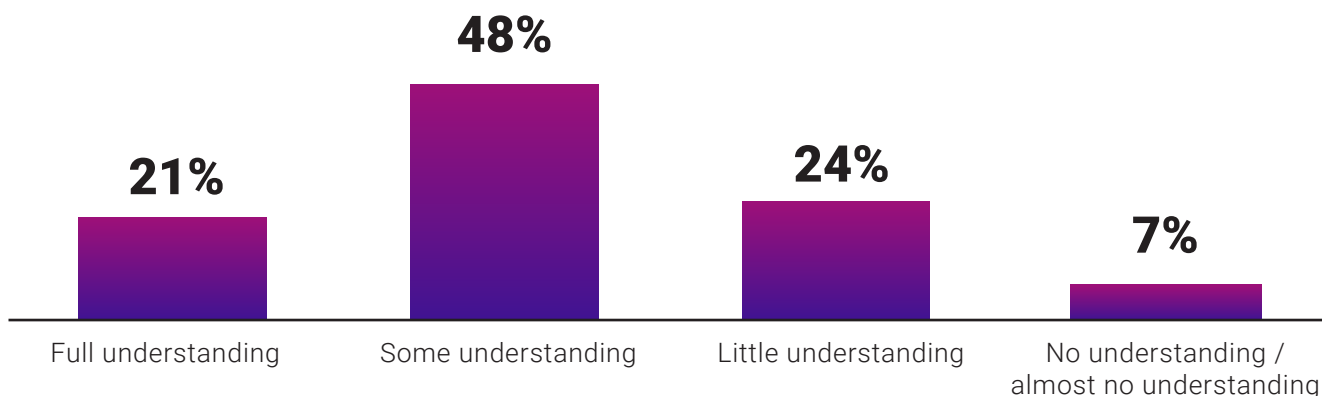
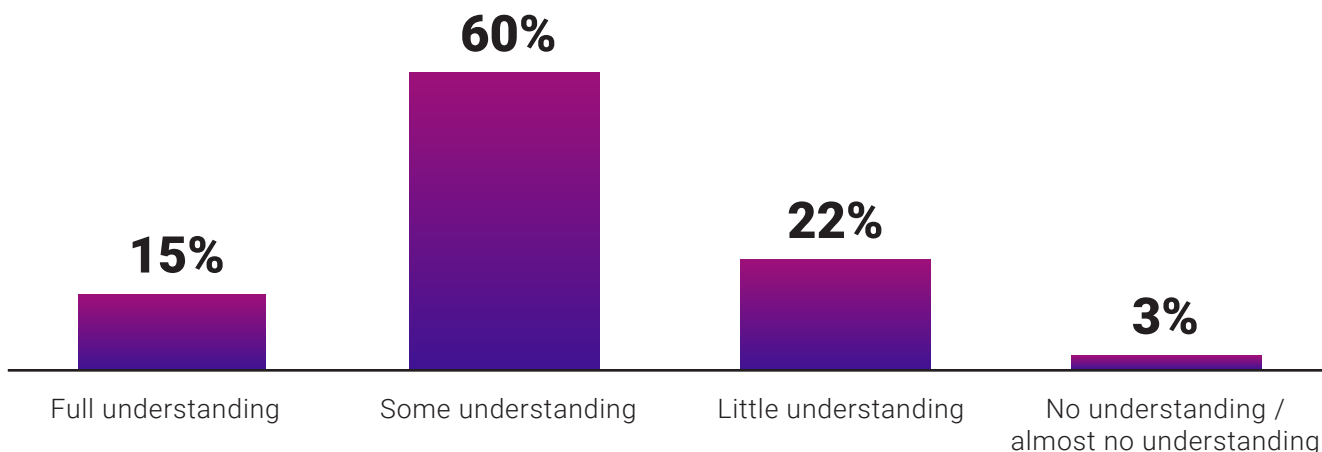


FIG 15. WHAT LEVEL OF UNDERSTANDING DOES MARKETING HAVE OF THE PROCESSES USED BY YOUR TECHNICAL OR IT TEAMS?



technical improvements to a site with the goal of improved digital performance. One infamous instance is the marketing changes made to ASOS' website in 2018, which led to a sharp drop in web traffic, which, in turn, impacted the company's search engine rankings and ultimately had a significant impact on profits.¹⁵

As seen earlier, these negative impacts aren't just occurring at a few unlucky organizations. 41% of those surveyed had experienced a technical change resulting in negative impact on marketing performance (Figure 10).

In addition to seeking to overcome the communication barriers discussed above, Alison Orsi draws upon her experiences at IBM to recommend that respective teams know their responsibilities when it comes to making changes:

"It all comes down to communication. For critical projects, we've ended up creating things like governance boards that have representation from both sides. It's about clear common goals heading towards a business outcome. And, you can do that at a micro level on a macro level."

Similarly, at Black Ballad, building transparency around big technical decisions is a high priority when it comes to avoiding problems. Bola Awoniyi explains the importance of giving anyone in an organization "the option, if they need or want, to go deeper and get a better sense of the ramifications".

Approaches to transparency and empowerment can be seen in other organizations. The system of Objectives and Key Responsibilities (OKRs), popularized by Google, aims to provide visibility over corporate targets at each level, while allowing teams and individuals to take action that contributes to ultimate company goals. At Spotify, the concept of 'aligned autonomy' contributes to maintaining a start-up culture,

seeking a functional balance between the remit of individual teams to ultimately achieve an aligned workflow.¹⁶

TOP PERFORMERS FACE CHALLENGES TOO

The good news here is that there appears to be some progress moving forward in getting workflows integrated. Half of the Mainstream organizations feel that the two are *somewhat integrated*, and the fact that 34% of top-performing respondents report that they have a *fully integrated* workflow suggests that this goal is achievable.

Importantly, nearly one-quarter (23%) reported that making on-site improvements is challenged by the fact that leadership does not understand the importance of site experience; a point illustrated in Figure 13, where 29% claimed that one of their top strategic barriers was that the *on-site experience is not a strategic priority* within their organizations.).

However, even with all the will in the world, marketing and tech teams might struggle to improve collaboration without the support of CMOs and wider business leaders. While data from respondents indicates that the current challenges are real, expert insight encourages that addressing these challenges is well-worth it. ■

34%

OF TOP PERFORMERS' MARKETING EFFORTS ARE FULLY INTEGRATED WITH THE WORKFLOW OF TECHNICAL TEAMS, COMPARED TO 16% OF MAINSTREAM.

¹⁵ www.bbc.co.uk/news/business-47877688

¹⁶ www.onlydeadfish.co.uk/only_dead_fish/2018/02/aligned-autonomy.html

WHAT THE FUTURE HOLDS

Conversations around digital performance feel particularly poignant right now. As the immediacy of the pandemic develops into what McKinsey are calling ‘the next normal’,¹⁷ the short-term pressure that has been placed on marketing leaders is bound to develop into a long-term reprioritisation of the place of digital in business.

In the words of Econsultancy’s Stefan Tornquist: “Businesses have been dithering about digital transformation for many years now. The reality is that 2020 means that everything that was on the plan as a “nice to have” is now critical. For CEOs, the buck stops with them. If they want any chance of survival in 2021, they need to make the changes their customers demand immediately.”

It’s clear from responses to the survey that on-site factors will play a key role – if not the key role – in organizations’ digital-first approach to the new normal. Virtually all

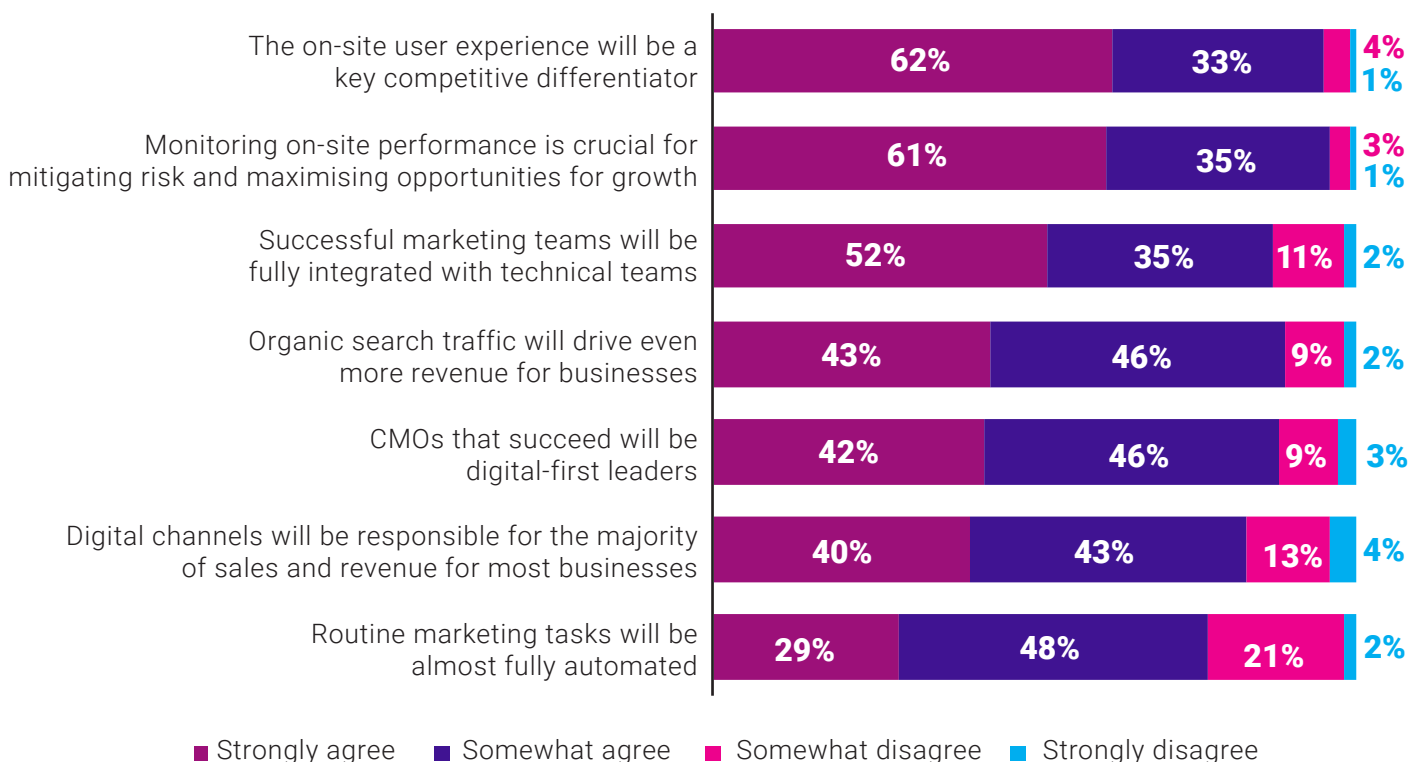
(96%) of the respondents either “strongly” or “somewhat” agreed that monitoring on-site performance will be crucial for mitigating risk and maximising opportunities for growth.

In fact, SEO and on-site factors accounted for respondents’ top three responses when considering the future (Figure 16). A further 95% agree to some extent that the on-site experience will be a key competitive differentiator, while nine in 10 (89%) think that organic search traffic will drive even more revenue for businesses.

Marketers also appear ready to face the challenge of disconnect between marketing and tech, envisioning the alignment between these teams in a successful digital-first future – some 87% agreed that successful marketing teams will be fully integrated with technical teams.

As Graham MacFadyen expresses, this will need to be a cultural effort: “You need really good interactions across teams, good mechanisms for building trust so that >

FIG 16. THINKING ABOUT THE FUTURE, TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?



¹⁷ www.mckinsey.com/industries/healthcare-systems-and-services/our-insights/beyond-coronavirus-the-path-to-the-next-normal

expertise on either side is respected. There's a whole cultural piece of work that goes into getting it right."

Although some 77% of overall respondents agree that routine marketing tasks will be almost fully automated in the future, only 29% "strongly agreed" this was the statement that the largest share (21%) somewhat disagreed with.

Notably, automation plays a significant role in top-performing organizations' visions of the future. Compared to three-quarters of Mainstream respondents, some nine in 10 (91%) top-performers agreed that marketers will strive for close to full automation.

DIGITAL IS INEVITABLE

The need for digital excellence is not a passing accommodation due to Covid-19 – in Alison Orsi's words, it's "table stakes" to be able to compete now and in the coming years.

More than eight in 10 (83%) respondents agreed that, in the future, digital channels will be responsible for the majority of sales and revenue for most businesses. This has certainly been seen in key sectors in which face-to-face contact has had to be removed, as Guy Magrath notes:

"I would imagine food shopping online is a very core indicator of what's about to happen

91%
**OF TOP PERFORMERS
AGREE THAT ROUTINE
MARKETING TASKS
WILL BE ALMOST FULLY
AUTOMATED IN THE
FUTURE, COMPARED TO
75% OF THE MAINSTREAM.**

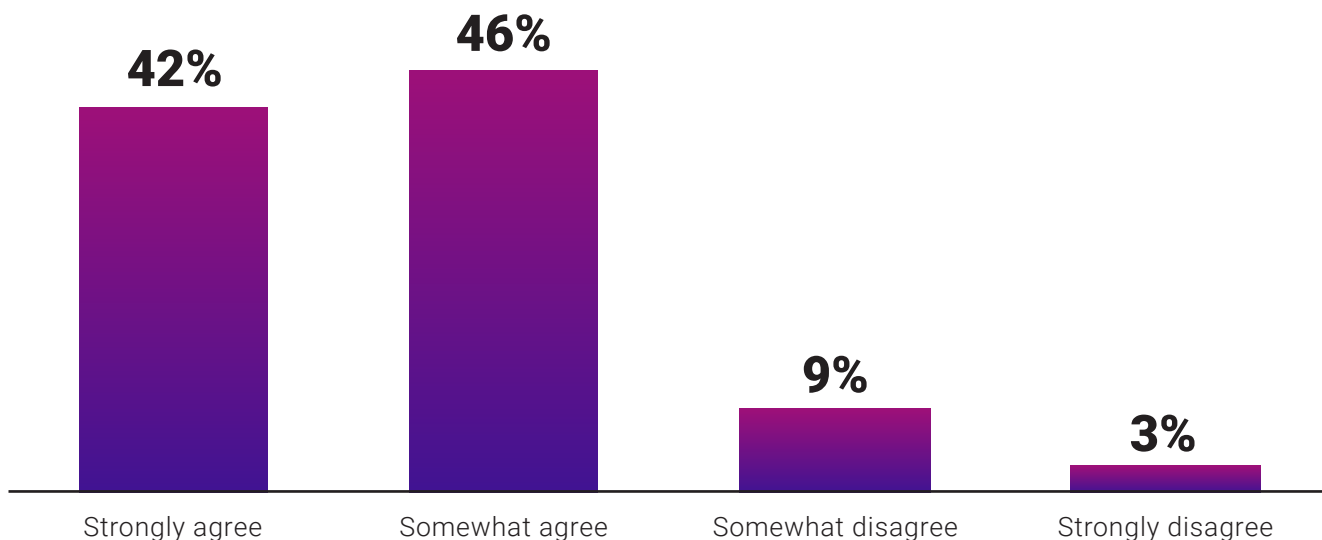
in other sectors. You don't need much more of a shift before physical retail becomes incredibly costly to do."

Respondents to the survey are in agreement – CMOs who succeed going forward will be digital-first leaders (Figure 17). Some 88% of the respondents think so.

The organizations that will set the bar in the years to come are those for which SEO and on-site performance are strategic imperatives, rather than incidental tasks caught between marketing and tech teams.

Though recovering from the pandemic and reaching for leading digital performance will be far from simple goals, the need to rise to the challenge has never been clearer. ■

FIG 17. CMOs THAT SUCCEED WILL BE DIGITAL-FIRST LEADERS.



KEY TAKEAWAYS

HEED COVID'S WARNING, BUT SEE IT AS AN OPPORTUNITY

The survey indicates that, so far, organizations feel confident in their response to the Covid-19 pandemic (*Figure 2*). However, in anticipation of the new normal, maintaining high-quality digital channels will only become more important, and the pandemic can be taken as an opportunity to reflect on current performance.

REMEMBER THAT TOP PERFORMERS ARE KEEPING SEO AND ON-SITE PERFORMANCE TOP OF MIND

Respondents from organizations exceeding their top business goal (*Figure 5*) are giving SEO and on-site performance the attention they deserve. They are more likely to believe that strong performance in search results is a key indicator of the health of a business, more likely to have an efficient strategy for monitoring on-site performance, and their marketing teams are more knowledgeable regarding SEO.

HONOR THE FACT THAT SEO IS BRINGING YOU REVENUE

Rather than being incidental to digital performance, SEO and on-site performance directly influence revenue (*Figure 6*), and particularly at top-performing organizations. It follows that attention paid by marketing leaders to organic search should reflect this contribution.

SEO CAN BE A "TRICKY BALANCE" AND NEEDS MARKETING POWER BEHIND IT

As expressed by marketing experts, perfecting SEO and on-site factors shouldn't have to compromise the quality of online content or brand presence. – it's for this reason that site optimization needs the careful consideration of marketers as much as it does the know-how of technical teams.

CONTENT, CONTENT, CONTENT

This is what Guy Magrath encourages marketers to keep in mind regarding SEO and organic search. Offering unique content on your site is an essential part of improving Google rankings, but from an e-commerce perspective, this can be difficult to scale. Following Amazon's example, consumer-generated content can be an effective way to achieve this goal. >

DEMOCRATIZE YOUR DATA

As part of its agile transformation, IBM has been “on a journey to democratize and integrate all data end to end on [its] marketing stack” (Alison Orsi). This has enabled the accurate measurement of the relative performance of organic search versus paid, and has allowed experts within the organization to make sure that on-site changes don’t have adverse effects.

AUTOMATE

Striving to automate manual processes wherever possible is a key marker of top-performing organizations’ approach to improving SEO and on-site factors. According to IBM, “automation achievers” outshine their peers in profitability, revenue growth and efficiency.

MAKE SURE THAT MARKETING AND TECH UNDERSTAND EACH OTHER

To overcome the challenge of disconnect between marketing and tech teams, marketing experts recommend a dedicated focus on making communication between teams as clear and effective as possible, with active listening from both sides and assigning a “bilingual” person to be the official translator between marketing and tech.

TO AVOID NEGATIVE FALLOUT OF TECHNICAL CHANGES, THINK ABOUT SETTING UP GOVERNANCE BOARDS

More than four in 10 respondents have experienced a negative impact on their marketing performance when they made changes to their websites (*Figure 10*). As IBM has demonstrated, governance boards with representation from all teams involved can pre-empt and neutralise any potential negative impact.

MAKE DIGITAL EXCELLENCE A CULTURAL CHANGE

Through the alignment of goals, greater transparency between teams and the recognition of SEO and organic search, firms will be best positioned to tackle wider strategic imperatives. ■



View from the expert

**IN 2020, DIGITAL IS THE CORE CHANNEL.
IT’S WHERE ALL YOUR CUSTOMERS ARE.”**

Chi Evi-Parker,
Marketing, digital and
e-commerce consultant



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