

## **Digital marketing capabilities in today's evolving digital world**

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### **Abstract**

Romania's digital infrastructure makes it an attractive place to start a tech business fertile according to Quartz, but its pool of talented product developers need sales and marketing skills, learning the important lessons of best practices. Digitization is transforming globally the way industry functions from supply chains to production to customer experience, companies being forced to continuously innovate. Digital marketing capabilities have become one of the most important marketing capabilities. The Romanian users' mobile internet consumption knew a considerable increase in the last years, while mobile telephony penetration rate is impressive. Globally, as shown by Deloitte's Global Mobile Consumer Trends, 1st Edition, 2016, mobile proves to be indispensable in today's always-connected world, and businesses must consider the key trends shaping the future of mobile connectivity. In order to advance on the way towards adopting the big corporate practice of mobile perfection, it is important to make practical steps. Other valuable researches revealed key insights in managing digital marketing activities, and key trends such as digital transformation moving from digital silos to integrated teams, considering the increasing talk of a need for a post-digital marketing world, without neglecting the challenge of integrating digital and traditional marketing. As it is not an easy task to apply the many digital channels and technologies to a business, it is worth having a better understanding of the core skills needed by today's digital marketer.

**Keywords:** Digital Marketing Capabilities; Mobile-first; Customer Engagement improvement; Organizing for Growth

**JEL Classification:** L86; M15; M31; O33

### **Digital marketing capabilities ranked as one of the most important marketing capabilities, but digital tops company gaps in marketing capabilities**

At the end of August this year, a distinguished member of the Editorial Board of the Holistic Marketing Management Journal attracted our attention on an article published in the well-known "Les Echos", France, and entitled "*And if Romania would become the Silicon Valley of Europe?*" (Moreira, 2016) This article's author showed that: with a maximum throughput of up to 73.6 Megabits per second (Mbps) in the fourth quarter 2015, the Romanian internet was thus far ahead of the United States (ranked as the 20<sup>th</sup>) and France (52<sup>nd</sup>), according to the quarterly "State of the Internet" report (now in its 9th year of publication) published by Akamai,

the world's leading content delivery network (CDN) provider (which uses its globally distributed Intelligent Platform™ to process trillions of requests each day; Akamai's advanced web performance, mobile performance, cloud security, and media delivery solutions are revolutionizing how businesses optimize consumer, enterprise, and entertainment experiences for any device, anywhere). In average rate, Romania is ranked as the 10<sup>th</sup> in the area covering Europe, the Middle East and Africa and as the 19<sup>th</sup> in the world, while France is ranked as the 21<sup>st</sup> on the European level and 44<sup>th</sup> in the world. The article mentioned above also highlighted that the speed of the Internet is not the only argument for Romania, which joined the European Union in 2007 and is now the second-fastest growing economy in Europe, after Ireland, according to Quartz, which also noted, among others, the following:

- Romania's digital infrastructure (a strong telecoms infrastructure, a STEM-focused education system, the third-highest percentage of women working in ICT in Europe etc.) makes it an attractive place to start a tech business fertile considering both the fertile soil for cultivating young developers, and the access to investment capital which still remain the main challenge holding the industry back;

- Romania needs an internal marketing team (not just need foreign investment), because *the pool of talented product developers* (created by the Romanian education system) *need sales and marketing skills*.

This approach allows us to put some ideas together, in order to learn the important lessons of best practices, making connections with different experiences, such as shown below:

- Digitization is transforming the way industry functions from supply chains to production to customer experience (the traditional customer-supplier experiences can be significantly improved by the digital capabilities), B2B buyers, for example, increasingly preferring digital; the way industrial companies interact with and serve their customers can be profoundly reshaped by digital, for example online marketplaces (such as Amazon Business and Alibaba) virtually connecting unlimited buyers and sellers, or suppliers are using faster data-driven tools to optimize pricing, and also sales representatives are making use of targeted insights about products to sell, customers' success stories, and simulations run with the customer during the sales visit; a successful digital transformation of an organization presupposes a thoughtful approach to change management, and additional value is created by people applying the technology in their daily jobs; (Caylar, Naik and Noterdaeme, 2016)

- Companies are forced to continuously innovate (increasing the total number of products they have to source, make, store, pick, deliver, service and recycle) by unpredictable consumer behavior and heightened market competition; (Llamasoft, 2016)

- Companies which don't have a rapid analytics capability in the actual environment (where the only thing you can be certain of is uncertainty) could be left behind if they don't

prove the ability to test scenarios to inform supply chain decisions, and to use analytics in supply chain design and planning; (Gibbs, 2016)

- Within the context of seeing throngs of people playing the new augmented-reality game Pokémon Go, LLamasoft's industry-leading supply chain management software recently built (wanting first to find the shortest path to cover all the stops, because speed is of the essence in the Pokémon journey) a transportation network model in Supply Chain Guru with demand originating at each of the Poké Stops (places where you can collect free items and potentially catch Pokémon) and Poké Gyms (places where you can train Pokémon) to find the shortest means to serve all of them; then LLamasoft added new constraints into the model to determine a route which would allow visiting the maximum number of locations, considering starting from a specific point, and then mixing in some options to multi-task to other places near the specific point; (Potluri, B. and Pinkert, 2016)

- *As better practices are implemented and new channels emerge, the way brands market and advertise is constantly changing*, mobile continuing to outpace desktop, and consumers wanting personalized and relevant content (according to the head of Revcontent's marketing strategies); 6 out of 10 apps most used globally are messaging apps (according to CMO.com); 86% of consumers suffer from banner blindness, meaning they can't recall the last display ad they saw (according to Adotas); 68% of people spend time reading about brands that interest them (according to DemandMetric); researchers found that colored visuals increased people's willingness to read a piece of content by 80% (according to Xerox); *78% of CMOs think custom content is the future of marketing* (according to DemandMetric); you're more likely to become a Navy SEAL than click on a banner ad (according to HubSpot); 72% of UK shoppers find personalization of product recommendations based on purchasing habits a "cool" capability when shopping (according to Econsultancy); consumer's average attention span is 8 seconds, 1 second less than a goldfish, dropping 4 seconds since 2000 (according to Marketing Insider Group); *marketers are investing more heavily in the tools that help create a great customer experience* (according to Kapost); *64% of marketers see social media as a critical enabler of products and services* (according to CMO.com); *within the next 5 years, 75% of marketing budgets will focus on digital, versus the 25% of the past* (according to Business 2 Community); *29% of video viewing in the U.S. occurs on mobile devices* (according to CMO.com); people are more likely to visit a B2B tech company's website after seeing a TWEET to becoming a LEAD (according to KoMarketing Associates); 86% of consumers say they feel ads are necessary to get FREE content online (according to Adweek); (McDermott, 2016)

- *Online forms can benefit different areas of an organization*, for example: marketing department can use embeddable forms to increase sign-ups and conversions, and also to boost enrollment (according to a Formstack infographic); (Jarski, 2016)

- *Rank order of most important marketing capabilities to an U.S. organization* (1= top rank; lower score means more important) looks as follows: brand development and management

capabilities – 3.5; customer focus capabilities (include actions that prioritize the customer) – 4.2; *digital marketing capabilities* (include digital strategy, social media, and mobile marketing activities) – 4.3; customer development and management capabilities – 4.3; marketing innovation capabilities – 4.9; marketing analytics capabilities – 5.2; creative capabilities – 5.5; Omni-channel execution capabilities – 5.9; agency management capabilities – 7.3 (according to The CMO Survey Highlights and Insights August 2016, the 17th administration of The CMO Survey, being surveyed 2956 top U.S. marketers at for-profit companies; survey in field from July 12, 2016 - August 1, 2016);

- *Top gaps in an U.S. organization's marketing capabilities* (1= top rank; lower score means bigger gap) looks as follows: *digital marketing capabilities* – 1.7; customer development and management capabilities – 1.9; marketing innovation capabilities – 1.9; Omni-channel execution capabilities – 1.9; brand development and management capabilities – 2.0; marketing analytics capabilities – 2.1; customer focus capabilities – 2.1; creative capabilities – 2.2; agency management capabilities – 2.4 (according to The CMO Survey Highlights and Insights August 2016);

- *Marketing's role has broadened in the last five years, and the percent of U.S. companies using marketing analytics in digital marketing decision area* (where question was asked for the first time in February 2016) *increased from 36.7% in February 2016 to 39.1% in August 2016* (according to The CMO Survey Highlights and Insights August 2016).

### **Keeping pace with customer behavior evolving to be mobile-first, and connecting better with him by leveraging mobile**

The Romanian National Authority for Management and Regulation in Communications (ANCOM) is the body that protects the interests of the communications users in Romania, by promoting competition in the communications market, ensuring the management of scarce resources and encouraging innovation and efficient investments in infrastructure. On August 4, 2016, ANCOM released (after public consultation on 18 May 2016 and summary of comments on 28 July 2016) the discussion paper on ANCOM strategy for digital communications 2020. On February 23, 2016 ANCOM announced the updating on Veritel.ro (the online application for comparing telecom offers) of the consumption values configuring the profile of an occasional, average and intensive mobile telephony and mobile internet user (on the basis of the most recent statistical data at that time), *the data processed by the ANCOM indicating that: the Romanian users' mobile internet consumption doubled in the second half of last year compared to the first half of the year*; an average user of mobile telephony and internet services consumes 336 MB mobile internet traffic a month (compared to 167 MB in the previous reporting period), sends 74 national SMS (of which, 62 on-net and 12 off-net) and call (on average) 245 minutes from their own terminal both on-net (177 minutes), and off-net (68 minutes).

On the occasion of a presentation delivered during the “ZF Mobilio‘16”, an event organised by Ziarul Financiar, ANCOM’s President showed, among others, that: by the end of 2015 in Romania there were 14.7 million broadband mobile connections (an increase by 22% in one year); *4G connections increased almost 3 times and a half in one year* (from less than 800,000 in 2014, to 2.7 million in 2015), confirming both the Romanian users’ interest for high performance terminals, mobility and speed, and the operators’ increased investment in networks in the recent years contributing to the rise and upsurge of the demand for such services; at the end of 2015 there were 23.1 million active users of these services in Romania (1% more compared to 2014); the number of subscription-based users reached 10.7 million (+8%), but the number of active prepaid cards decreased by 5% (to 12.5 million); *at the end of 2015 mobile telephony penetration rate per 100 inhabitants reached 116.4%*, while SMS messages reached over 20 billion (3% more than in 2014), and more than half of the voice traffic being achieved by subscription-based users (40% of the SMS traffic being achieved by such users).

It is worth mentioning, within this framework, that according to *a qualitative study - on user’s needs & perceptions in relation with electronic communications services - conducted in September-October 2015 by Mercury Research for ANCOM*: the younger segments predominantly use mobile communication services (mobile or Internet phone) and fixed Internet, while more advanced age segments show a greater propensity for voice (mobile and fixed); the use of communications services by business segments (IT specialists, companies, equipment manufacturers, online service providers, media), academics and authorities, is varied and influenced in large measure by the professional side, sometimes the need for certain services being triggered by its use at work. (Mercury Research, 2015)

It is a well-known fact that in the first half of 2015 there were over 5.2 billion mobile phone users comprising 73% of the global population. (Meeker, 2015) As shown by Oracle: mobile users already overtook in 2014 the number of desktop users; the number of global Internet users (2.8 billion) will be soon overtaken by the smartphone subscriptions (currently 2.1 billion), the average person spending today close to 3 hours each day engaged with his devices; businesses must evolve the various ways in which they interact with their customers and prospects keeping pace with customer behavior evolving to be mobile-first; as customers will increasingly use their mobile devices to contact customer service organizations with their service inquiries service, these last ones must bridge the gap between mobile behavior and customer service, what implies a strategic review of value drivers combined with a tactical search for relevant use cases. (Oracle, 2016)

On the other hand, according to *Deloitte’s Global Mobile Consumer Trends, 1st Edition, 2016, mobile proves to be indispensable in today’s always-connected world*, survey’s findings (this survey being the biggest and most extensive to date, covering 6 continents, 31 countries, and 49,500 respondents representing close to 70% of the world’s total population which, and focusing on consumer behaviors, trends and opinions for a broad range of wireless and mobility products and services), indicating *five key trends shaping the future of mobile connectivity*:

*mobility comes in all shapes and sizes (smartphones, wearables, tablets); consumers can't get enough mobile screen time (all mobile consumers globally check their phones within three hours of waking up, checking their phones around 40 times per day); text and instant message are consumer favorites (first thing every day consumers are most commonly checking text messages and instant messages); mPayment usage is picking up speed (approximately 40% of the consumers globally are concerned that mobile payments are not secure enough); network versus Wi-Fi – a regional preference (though 4G provides substantially faster speeds, the activities / applications people use most don't require high-bandwidth services, e.g., email, search).*

It is also worth remembering that according to annual global study led by *Deloitte* and entitled “*The future of mobility*” (providing a comprehensive analysis of the supply and demand relationship between consumers and mobile digital devices), there are some very *significant findings*, such as: 4G is becoming mainstream, the driving forces behind its adoption being the early adopters and early considerers are the driving forces behind 4G adoption; *smartphone ownership is dominant among digital devices, and online purchasing channels can take over offline channels while changing the value chain*; as consumers are reluctant to pay for mobile apps, app developers need to diversified revenue sources in order to reduce risks, app-based mobile payment solution leading hardware-based; key to success for ecosystem players is to develop a wide array of application scenarios; younger age group showed more willingness towards mobile banking; *Internet of Things devices most likely to become popular in the next 3 years are “connected home entertainment” and “connected individual devices”* etc. (Deloitte, 2015)

As we have seen above, mobile is continuing to outpace desktop. *In order to advance on the way towards adopting the big corporate practice of mobile perfection*, CEO and Chairman of Alumnify Inc. (which creates connections by bridging the gap between alumni and their organizations) recommends *some practical steps* (preceded by a testing process in place, and keeping constant innovation after these steps): *to be in the right place at the right time* (by sending company's target market an offer whenever they come within a certain distance of company's store, and making a dedicated app or an online game); *to give customers some fresh exclusive content, and deals* (keeping people interested by giving them a reason to actually pick up company's mobile app); *to prioritize customer engagement* improvement (keeping people tied to company's brand by providing ways in which company's customers can get involved with its latest project). (Agraval, 2016)

### **Key insights in managing digital marketing activities, and core skills needed by today's digital marketers**

The findings of a valuable research report based on a survey (exploring the approaches businesses use to plan and manage their investments in digital marketing, and received over 1,500 answers) of *Smart Insights* members and *Technology for Marketing 2016* attendees –

event, 28-29 September, London – as of 8 February 2016, revealed respondents' opinion in relation the *digital marketing activities with the greatest commercial impact* in 2016: *Content marketing* – 22%; *Big Data* (including market and customer insight and predictive analytics) – 17%; *Marketing Automation* (including CRM, behavioural Email marketing and web personalisation) – 13%; *Mobile marketing* (Mobile advertising, site development and apps) – 2%; *Social media marketing* (including Social CRM and Social Customer Care) – 8%; *Wearables* (e.g. Apple Watch, activity trackers, augmented reality) – 6%; *Conversion rate optimisation* (CRO / improving website experiences) – 5%; *Internet of Things* (IoT) marketing applications – 4%; *Search Engine Optimisation* (SEO) – 3%; *Communities* (Branded niche or vertical communities) – 3%; Online PR (including influencer outreach) – 2%; *Paid search marketing* (e.g. Google AdWords, Pay Per Click) – 2%; Display inc Programmatic (Banners on publishers, ad networks social media including retargeting and programmatic) – 2%; Partnerships including affiliate and co-marketing – 1%. (Chaffey, 2016) The reputed David Chaffey highlighted, within the above mentioned context, that *core to understanding trends in digital marketing are changes in consumer use of digital media and technology*, continuing to see consumer decision behavior increase in complexity (citing also GfK research analysts who show the complexity of today's customer journeys across multiple devices and through time, particularly for high involvement or high-value purchases).

Chaffey also showed that *other key trends* (beyond the increasing complexity of the purchase decision) to follow in 2016 will be: *the use of mobile marketing* (citing Mary Meeker's State of mobile marketing reports published regularly as part of the 2015 Internet Trends report available from Kleiner Perkins Caufield & Byers - KPCB), being seen a continued strong growth in mobile use, and mobile digital media time being now greater than desktop and other media; (Chaffey, 2015) *digital transformation* (from digital silos to integrated teams), considering the increasing talk of a need for a post-digital marketing world (as shown by the Y&R Chairman and CEO David Sable, who argued for example, that Digital Exponential done right is far more compelling than post-digital), (Sable, 2012) this post-digital thinking being driven by changes in consumer media consumption (to consuming content in different formats without consciously thinking about which devices or channels) and by problems of managing marketing activities because of digital silos (Chaffey insists on the fact that from the viewpoint of their digital capabilities many businesses are still at level 1 or 2 on a 5 point maturity scale, research showing that many businesses don't have a digital marketing plan); (Chaffey, 2015) *the rise of the Chief Marketing Technologist* (within the framework of the shift in control of marketing technology from IT and Sales to Marketing); *the challenge of integrating digital and traditional marketing* (when it comes to planning their marketing many businesses have separate traditional marketing and digital marketing teams working independently).

At the end of September last year Chaffey invited companies to *discover their business's ability to Plan, Reach, Act, Convert and Engage*, underlining that applying the many digital channels and technologies to a business is not an easy task, having to master a large number of

different disciplines, that is why *Smart Insights* listed 20 core skills needed by today's digital marketer. (Allen, 2016) These digital marketing skills are the following: Affiliate marketing (beyond just a "pay-per-performance marketing" method); Analytical skills including reviewing digital analytics and business insight; Budgeting and Financial modelling skills; Community management; Content marketing (which is at the heart of digital marketing); Copywriting; Customer data and Marketing Insight; Customer experience design, personalisation and merchandising (including CRO); Customer service, support and assisted selling; *Digital strategy development, governance and campaign planning* (being recommended PR Smith's SOSTAC® model (Chaffey, 2016) of situation analysis, objective setting, strategy, tactics, action, and control; in online marketing have to be applied to each part of the customer lifecycle as defined by the RACE planning system of Smart Insights); Development and coding (e.g. basic HTML, CSS, etc.); *Email marketing, E-CRM and Marketing Automation*; *Graphic design* (including Photoshop, InDesign, Illustrator); *Mobile marketing*; *Online advertising and programmatic marketing*; *Pay per click / Google AdWords*; *PR and influencer outreach*; *Planning integrated, multichannel campaigns*; (Smart Insights) *SEO*; *Social Media marketing* (setting goals for ROI and performance, creating an integrated strategy, and using tools and techniques to start a social listening programme).

## Conclusions

In our opinion it is worth concluding by highlighting some key findings from the challenging "*Marketing2020 – Organizing for Growth*" study led by Millward BrownVermeer in partnership with the Association of National Advertisers (ANA), Spencer Stuart, Forbes, MetrixLab, and Adobe, as well as the World Federation of Advertisers (WFA) and its organizations in China, Brazil, UK, Germany, The Netherlands, Belgium, Turkey, and France. *Marketing 2020 CMO Brochure* reveals that: "*In today's evolving digital world, what marketing does has changed beyond recognition, but how the function is organized has not changed much... Marketers working on purposeful brands also report back that they are better able to preserve brand consistency as touch points increase and go digital... Winning brands deliver a total experience with increased relationship breadth and depth, creating a personalized and social experience across a multitude of touch points throughout consumers' daily lives... The capabilities with the highest growth correlation are Consumer Understanding, Brand Positioning and Brand Strategy.*" (Millward Brown Vermeer, 2014)

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