European Marketing Agenda 2020:

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European Marketing Agenda 2020...
the journey continues

The success of marketing over the last years now spurs us on to ensure that the 2020 edition of the European Marketing Agenda 2020 lives up to the high standards we have all come to expect. Now an established highlight in the industry calendar, the study will once again adopt a highly relevant, future-oriented concept centering on the use of a range of national and international topics and challenges, as well as inspirational insights to explore a broad spectrum of topics from as many different perspectives as possible. The feedback received from Marketing Days and Conferences across Europe has shown that the fulfilment of quality in content not only yields an extremely positive response (perhaps unsurprising given the range of often vague platitudes and promises of salvation encountered elsewhere), but must also remain the foundation for future editions. It was against this backdrop that we once again joined forces across the European Marketing Confederation (EMC) to carry out the *Marketing Agenda 2020*, a survey of more than 1,000 European Chief Marketing Officers and Board members for Marketing & Sales. As in previous years, the survey was backed up by further research including discussions with the board of the various marketing associations across Europe, members of the CMO Community, members of the digital CMO Community and over 30 interviews. We are once again indebted to all our colleagues for not only their suggestions and inspiration, but also the dedication and brain power they put into them. We thank each and every one of you! We also extend our heartfelt gratitude to all our colleagues for the support we have received!

We hope that the *Marketing Agenda 2020* and the conceptual foundation it lays provide you with a wealth of ideas and items for discussion. What is more, we relish the prospect of exploring this year's top priorities and challenges with you in more detail along with a range of fascinating speakers and contributors within Marketing Days and Conferences across Europe in 2020. We look forward to further feedback and discussions on marketing in 2020!

Yours,

Andreas Balazs (Switzerland)

Victor Conde (Spain)

Jonathan Deacon (UK)

Martin Huisman (Netherlands)

Tatiana Komissarova (Russia)

Alvydė Palaimaitė (Lithuania)

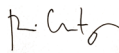**Ralf Strauss** (Germany)

Uwe Tännler (EMC)

Nikolay Tinkov (Bulgaria)

Tom Trainor (Ireland)
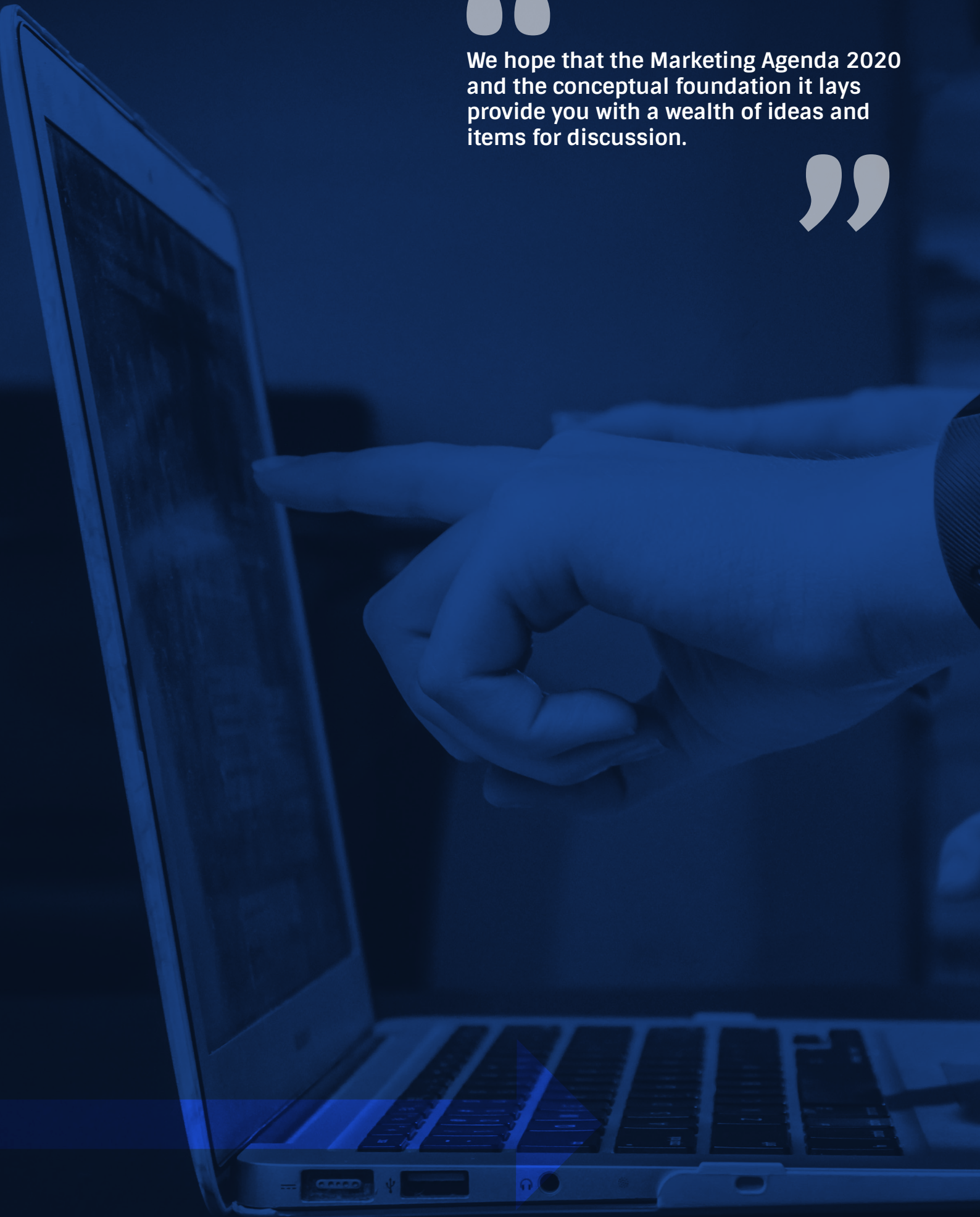
Rui Ventura (Portugal)

Georg Wiedenhofer (Austria)

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Marketing Agenda 2020 – Me.Unlimited.

Digitalisation faces marketing organisations and decision-makers with challenges whose impact is rarely restricted to individual corporate units and generally felt throughout corporate strategy, corporate culture, organisational structure and operational processes. On the one hand, it is therefore unsurprising that digital projects originally seen as stand-alone initiatives rapidly lead to the realisation that there is a need for overarching changes involving all corporate units, with operational restructuring required in many cases. On the other, any attempt to achieve digital transformation without surrendering the status quo is almost certain to fail. We are therefore confronted with a conflicting situation in which the dogma of *"Digital is the new normal"* and a legion of start-ups just waiting to cannibalise conventional business models are juxtaposed against the many painful, cost-intensive experiences (and personal wounds) of the marketing/sales and IT projects of the past, for example in the field of CRM. By way of contrast, digital innovations such as the use of *WhatsApp* or *Netflix* have long since become part of the daily lives of customers and consumers and are adapted at an astounding pace.

It is to be noted that the future of marketing as an interface between businesses and consumers within the context of market-oriented management will be characterised by a number of central trends that can be summarised as the following **10 theses on the future of marketing**:

Hyper-individualisation and storytelling for savvy target groups: Mass communication with sociodemographic target groups is set to be replaced by storytelling tailored to the respective audience and founded on insights catalysed in data-driven plans.

Artificial intelligence for enhanced automated customer interaction: Chatbots are seen as the killer app here, not least because they represent a uniform point of initial contact which facilitates the redefinition of automated customer interactions;

New legal parameters: The advent of GDPR is accompanied by new challenges in connection with the gathering and storage of data – and in particular personal data– without yielding it to walled gardens such as *Google*, *Facebook* and *Amazon*.

The programmatic revolution will eat its children: Walled gardens have essentially always sold their advertising programmatically and are now making life increasingly difficult for independent tech providers. GDPR tends to (indirectly) promote the strengthening of oligopoly-like, US-style market structures, places considerable restrictions on the use of third-party cookies and demands the implementation of systematic content management.

3D printing is coming of age: Mass individualisation all the way through to consumer products (mass customisation) is now a reality thanks to 3D printing and set to enjoy an increasing level of acceptance.

Pricing revolution: The high-resolution differentiation made possible by data and algorithms also extends to pricing, for example in the form of the definition and targeted communication of specific prices for individual customers. This is of particular value when it comes to the pricing of innovations.

Brand versus sales promotion: Recent years have seen most marketing departments prioritise performance marketing in the lower funnel, either downsizing or doing away with their brand management activities in the process. The pendulum is now swinging back the other way, as is evidenced by a gradual realisation that brands offer consumers an important point of reference. The result is a shift in focus back to brand marketing in the upper funnel.
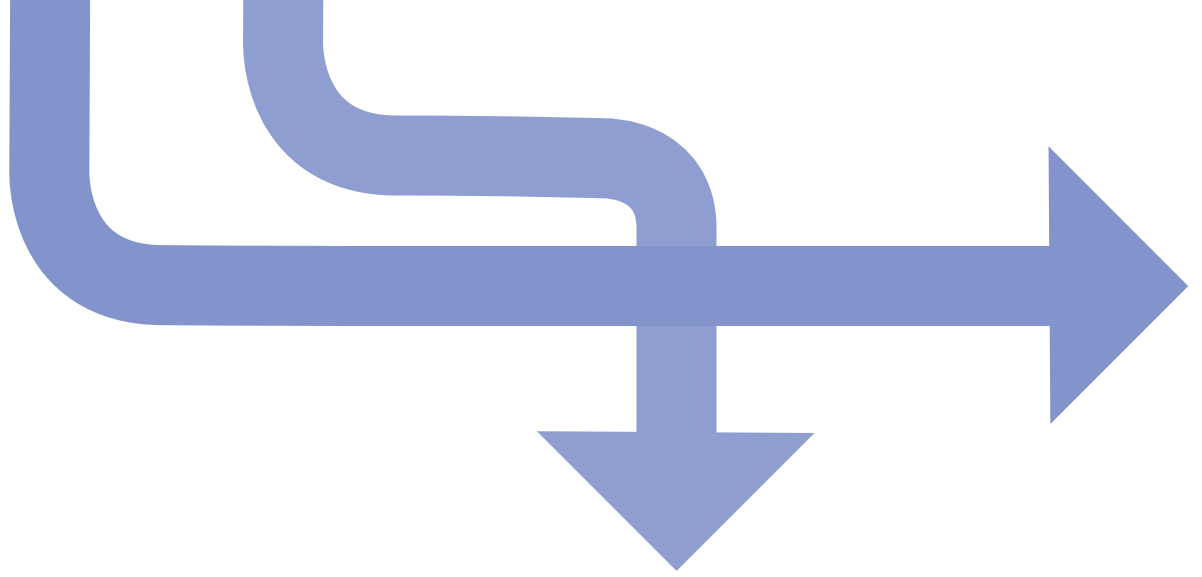
Direct-to-consumer marketing:
Driven by the need to gather their own data as a basis for consumer insights, an increasing number of companies are initiating direct-to-consumer and omnichannel projects parallel to established commercial structures in which they function as intermediaries.

Insourcing: The outsourcing wave appears to have broken, with more and more marketing functions now being brought back in-house. This shift is attributable to a higher pace of implementation, the wealth of internal product and market knowledge held by companies themselves and pre-existing pressure to establish and maintain an in-house pool of technological expertise.

MarketingTech: Bringing digital dreams to life demands the establishment of proprietary application landscapes and the creation of intelligent integration scenarios. This, in turn, is dependent on cutting-edge knowledge and skills wielded by MarketingTech experts.

As in previous years, the marketing of the future continues to be dependent on the following **5 S elements** in 2020[1]:

- **Science:** The use of (multivariate) scientific processes to analyse the customer journey and customer preferences using data from a variety of sources (big data) with the aim of implementing real-time marketing and/or optimising marketing expenditure (e.g. within the context of modelling based on causal analysis). This demands not only considerable methodological expertise, but also enhanced knowledge of marketing technologies.
- **Substance:** Consistent customer experience management across all touchpoints (including during the development of new products and services).
- **Story:** Transmedial storytelling as a content marketing instrument. In other words: A shift from push/inside-out towards pull/outside-in with the aim of building a bridge between brand and user within the respective context.[2]
- **Speed:** Having once been a "batch" process, marketing must now act as a permanent customer catalyst and evangelist. This, in turn, requires an entirely new form of organisational adaptability also referred to as "agility". *Nestlé*, for example, has established "Digital Acceleration Teams" tasked with training and supporting existing operational units in fields such as social

communication and performance marketing. At its core this can be seen as the creation of cross-functional teams using the so-called "overlay" process already familiar in the IT sector.
- **Simplicity:** The reduction of hierarchies, silos and redundancy within organisations. This naturally also extends to the streamlining of cooperation with external partners such as agencies. The customer experience is given highest priority during the definition and application of the entire customer journey *(customer journey mapping)*.

Marketing Agenda 2020 is the latest in a series of trend studies published by the European Marketing Confederation (EMC). It was drawn up in late 2019 with the aim of providing detailed insights into the challenges faced and specific strategies adopted by European CMOs and in turn identifying the trends to be expected in 2020. The primary objectives of the survey were to determine both the most important issues and the key challenges and barriers from a marketing and sales perspective in 2020. A total of over 1,000 European Chief Marketing Officers and board members for marketing & sales were surveyed, with 767 full responses received. An additional 32 personal interviews were also carried out.

1 Gordon, J.; Perrey, J.: The dawn of marketing's new golden age, in: McKinsey Quarterly, February 2015.
2 Smith, P.: Lead with a Story: A Guide to Crafting Business Narratives that Captivate, Convince, and Inspire, Cincinnati 2012.

As in previous years, the responses received from European marketing and sales managers when asked about the most important issues facing them in 2020 and beyond demonstrate a clear tendency towards a number of key topics ranging from digital marketing and brand strategy to content marketing and optimisation (see Fig. 1).
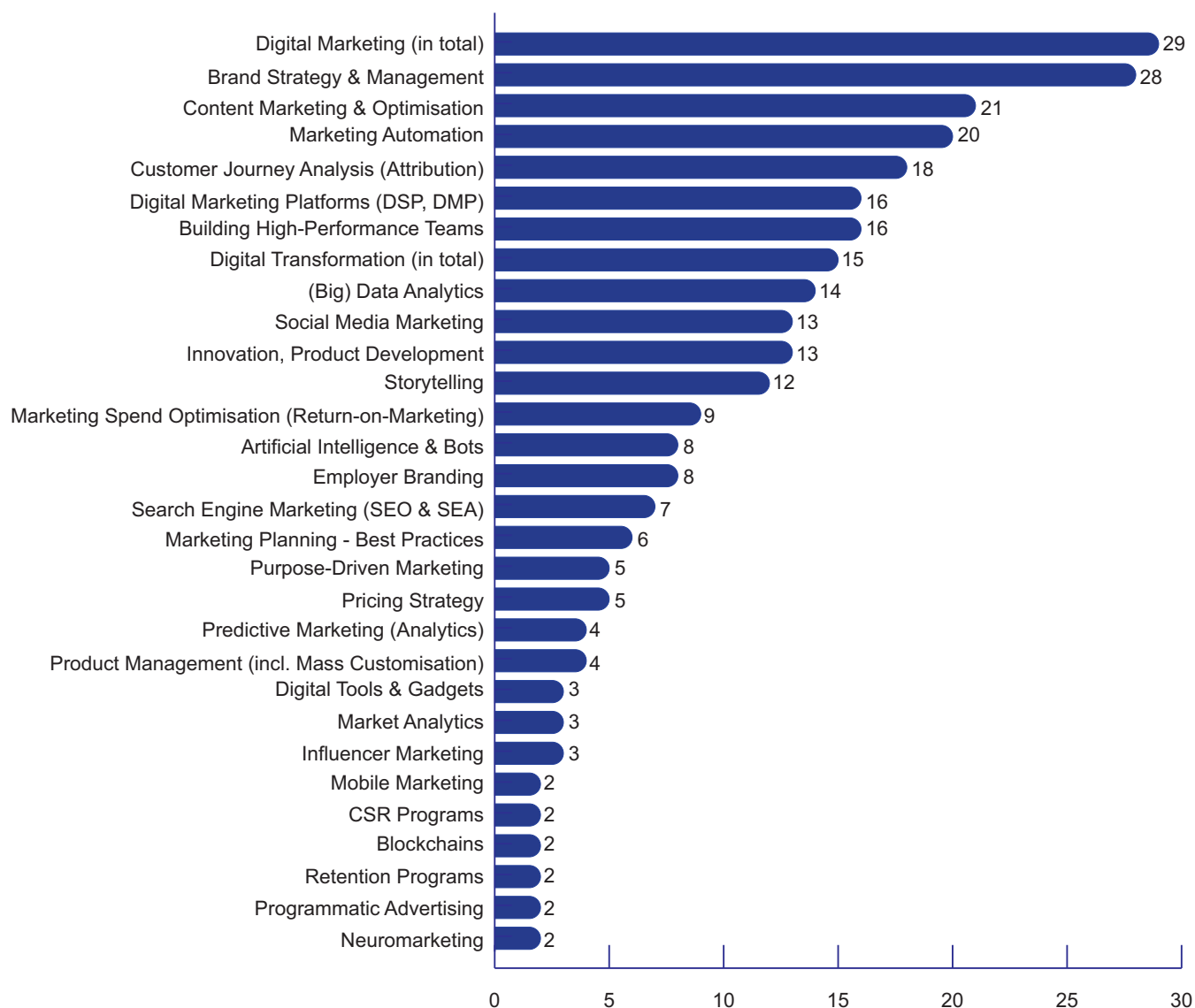

Figure 1: The most important issues in Europe in 2020 (each respondent was asked to pick their top 3 issues, in %, n=767)

Although an adequate understanding and at least partial implementation of individual digital marketing tools are already in evidence, the results of this year's interviews combine with almost 30 years of project experience to illustrate that it is neither technology nor individual tools that are required, but the orchestration of **cross-functional teams** and "mass individualised" communication in accordance with the principle of **data-driven programmatic advertising**. **Digital data platforms** such as DMPs and data lakes form the foundation for not only analytics, but also the control of customer contacts in operational scenarios (as part of comprehensive **marketing tech**). Access to user data is one of the critical factors in the effective targeting of "gravitational content" and plays an especially important role in the analysis of the **customer journey**. The evaluation of a plethora of online and offline points of contact with product and company right through to the purchase decision makes it possible to identify further opportunities to streamline the use of resources. The customer journey sees the customer navigate through the various stages of the purchase decision process, each of which should ideally be accompanied by corresponding marketing activities. From a marketing perspective, it is vital that touchpoints between the customer and the product and/or company are analysed with a view to determining and optimising the channels, advertising media, content and propositions that guide the customer towards making a purchase (attribution). Initial questions in this regard include:

- What touchpoints occurred between the user's initial contact with the product and their purchase decision?
- Which contact in which channel made which contribution to the final purchase decision?

Brand confidence has taken hit after hit: Consumer studies such as *Meaningful Brands* (Havas Group) show that consumers couldn't care less if

74% of all brands simply disappeared.[3] At an international level consumers rate over three quarters of brands as "dispensable". In the case of millennials in particular, brand loyalty now plays hardly any role whatsoever. The significance of "cult brands" continues to diminish in that generation, with the days when playground battle lines were drawn between the *Nike* and *Adidas* factions now essentially consigned to the past. The current generation still values quality brands but tends to be less discerning when it comes to choosing a brand from within that bracket. Millennials base their purchase decisions on functionality, convenience, flexibility, and, above all else, the best deal. As such, they tend to focus on functional product characteristics rather than the brand itself.

With this in mind, companies must ask themselves what they stand for and which stance, attitude or identity they wish to convey with their product and associated communication. Studies show that brands which succeed in being perceived as "meaningful" enjoy greater commercial success, outstripping the stock market by up to 206% over a period of ten years. Brand managers therefore place greater emphasis on aspects such as sustainability and social and ecological responsibility than they did a few years ago. Having previously seen themselves as the "standard-bearers for significance and meaning in the lives of their customers," brand manufacturers now regard "**purpose-driven marketing**" as a potential route to greener pastures. In the case of brand presentation, the time has come for a shift from traditional push to pull mechanisms: Each individual essentially needs to become the "gravitational centre of an individual universe" in which content orbits, gravitates towards them at an opportune moment and initiates a dialogue between brand and user which the latter perceives to be relevant. Supported by self-learning software, media firms and marketers

will in future assume the role of "content orchestrators" responsible for ensuring that messages, products and services are adapted to the personal universe and context of their addressees.[4] As in previous years, the challenges that accompany the implementation of efficient **content marketing** will remain a key issue in 2020. A survey carried out as part of the *Content Marketing Monitor* found strategy, implementation and tracking to be areas in which there is a considerable amount of catching up to do.

The need for enhanced **marketing automation** – i.e. the use of modern (inbound) IT platforms to acquire new customers, strengthen customer loyalty and generate repeat sales from existing customers – was stressed

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> "

3 Havas Group: Meaningful Brands, taken from: https://www.meaningful-brands.com/en, retrieved on 24.12.2018.
4 Pulizzi, J.; Barrett, N.: Get Content, Get Customers: Turn Prospects into Buyers with Content Marketing, New York 2009; Bashford, S.: Brands take the reins on content, in: Marketing Magazine UK, June 20, 2012, pp. 39-45.
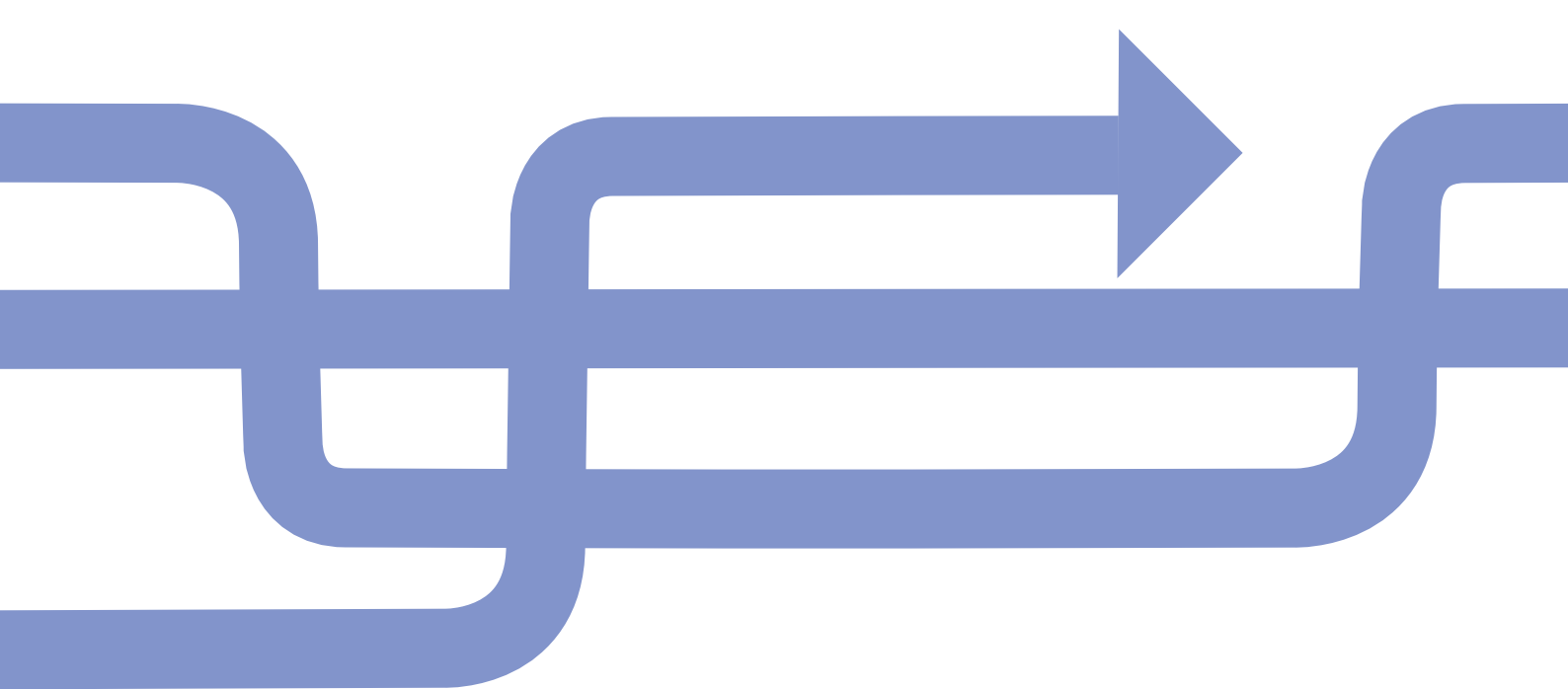
by all respondents and ranks as the most important issue overall. The majority of discussions on the subject of marketing automation focused on *lead nurturing* as a means of ensuring the systematic, automated qualification of a lead (e.g. in the form of an enquiry, data points gathered using cookies or the submission of contact details such as an email address) right through to order placement. Automation and individualisation represent opportunities to tailor propositions to specific situations. The main area of focus is an integrated approach to lead generation, cultivation and conversion that includes the automation of a variety of marketing techniques and sales processes from initial contact right through to the conclusion of a sale. As a result, dynamic (real-time) pricing as a means of dynamic, "mass individualised" price definition is now being expanded to include data points from the respective context in order to facilitate **situational dynamic real-time pricing** and propositions. The fact that continuous innovation is now a must also demands the reassessment of **pricing strategies for innovations**.

Digitalisation continues to amplify both the trend towards **individualisation** and the dynamics it brings with it: Whereas industrialisation heralded the advent of the homogeneous, mass-produced article, digitalisation is now leading

to a resurgence in the individuality of many products and services. To give an example, 3D printers have to date tended to be used for the rapid manufacturing of prototypes, tailored dental prosthetics and rarely changed spare parts in fields such as aircraft construction. Although traditional manufacturing processes are still a significantly cheaper means of mass production, 3D printing is now on its way to becoming so cost-effective that it can be used for the mass production of tailored, individual products. In the case of additive manufacturing it is becoming increasingly cost-effective to produce components using 3D printing rather than die casting (the lowest cost method of mass production), especially where small batches are concerned. The driving forces behind the shift towards unique products or small customer-specific batches include the consumer's desire to be seen and appreciated as an individual by the brand itself as well as absolute technical necessities (for example the fact that a medical prosthesis must fit its wearer perfectly). Customers who are given the opportunity to influence the design of both brand interaction and products themselves experience a type of power that stabilises their self-esteem. According to Reckwitz, the desire to stand out from the crowd with something of one's own results in a *"society of singularities"*.[5] As a consequence, late modern societies acknowledge people who are unique, have unusual interests, navigate their way through the infinite range of available options to create an unmistakable biography and possess the ability to "curate" their own lives.

This is not the age of the "average joe", with meek adaptation looked down upon just as much in social and private situations as it is in the workplace. The psychological reason behind this is that consumers are already extremely well served by the huge variety available to them in most product segments. Sports shoes, for example, have become an opportunity for self-presentation and stylisation. Personalisation is particularly appropriate in the case of products that enable consumers to enhance their individuality, for example "personality markers" such as fashion, cars, coffee or *Nutella*.

According to European marketing managers, the next evolutionary step forward in the field of **(big) data analytics** and **predictive analytics** needs to include:
- The process-related and technological consolidation of all data sources, for example with the aid of data stewards; and
- The use of artificial intelligence to analyse and evaluate data according to the principle of deep learning.

If this is ensured the resultant data lakes can be used to generate usable consumer insights ready for practical implementation.[6] Many corporate decision-makers are aware that the incorporation of **artificial intelligence**

5 Reckwitz, A.: Die Gesellschaft der Singularitäten: Zum Strukturwandel der Moderne, Berlin 2017.
6 Mayer-Schönberger, V.; Cukier, K.: Big Data, London 2013.
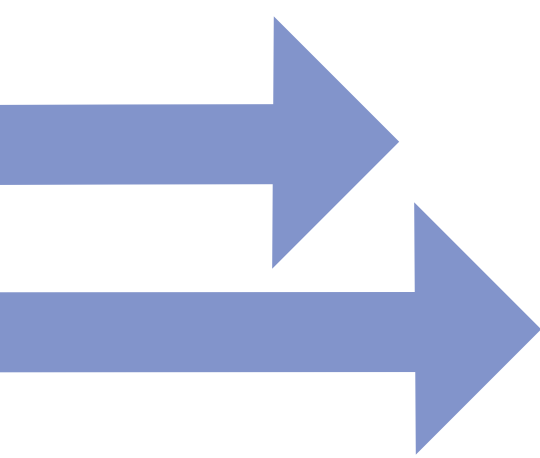
into the value chain offers considerable potential. Around 80% of companies are already investing at least to some extent in artificial intelligence in the hope that it will lead to benefits such as higher turnover and competitive advantages. As a basic principle, the challenge is to identify practical use cases that will also yield tangible benefits in the short term. Applications include intelligent recommendation engines designed to exploit opportunities for cross and up-selling, customer churn forecasting, sentiment analysis (within the context of social media monitoring), automated (e.g. chatbot-based) service scenarios and recruiting automation. Other challenges that lie ahead include **blockchains**, which are regarded as having the potential to become a key technology and transaction protocol for networked market participants. As in the case of artificial intelligence, practical implementation is nevertheless unlikely to occur in the next few years at least, with blockchains therefore set to remain on the watch list for the time being.

Digital euphoria and the decision by many employees to leave traditional companies in favour of "start-up cultures" combine to ensure that focus on the issue of organisational performance has done anything but wane. In particular, there is a desire to establish organisational structures and high-performance **teams** that not only ensure effective internal cooperation and coordination throughout web-based value creation processes,

but also foster capacity for innovation. Speaking in reference to this issue, a number of the managers interviewed as part of the quantitative study stated that *"getting/enhancing talented people to do our job!"* needs to be given top priority. The achievement of this outcome is increasingly dependent on a leadership style characterized by inspiration, reputation and a high level of cooperation which, at its zenith, can result in a *"leaderless organisation"* or *"holacracy"*. As such, the principles of management are now shifting towards **digital leadership**: Managers who are open to the use of modern tools demonstrate that they themselves are able to use them and wish to remain agile, enhance their internal network within the company and give employees more opportunities to participate in processes.[7] With this in mind, it is important to note that user centricity refers to not only (external) customers within the context of **total customer experience management** and experience design, but also the (internal) corporate organisation. This implies that it is a higher degree of self-organisation and a "fail faster" approach that are required, not autocracy and strict adherence to rigid, hierarchical, bureaucratic structures. More explicitly, the goal is to generate an efficient (real-time) catalysing effect between customers and consumers on one side and businesses on the other within the framework of **innovation management** focusing on the following aspects:

- New products and services with the potential to capture new markets;
- Enhanced products and services

that differentiate a business from its competitors;
- Enhanced internal processes;
- The development of new business models and revenue streams.

It is to be noted that there are significant differences between industrial sectors: 2020 will see the automotive sector place particular emphasis on the establishment of *"high-performance teams"*, whereas the *"establishment of digital marketing platforms (DSP, DMP)"* will be of above-average importance among energy utilities and businesses in the tourism and media sectors. Artificial intelligence and the use of bots remains the preserve of tech firms. Media organisations focus much more strongly on *"change management"* than firms in other sectors.

There are also some significant differences between European countries in terms of their priorities in 2020: In **Lithuania**, for example, the dominant topics in 2020 are "*Brand Strategy & Management"* (32%), *"Content Marketing"* (17%), *"Innovation & Product Management"* and *"Social Media Marketing"* (both 20%). Lithuanian sales and marketing managers place less focus on topics such as *"Big Data"* and *"Digital Transformation"* than any of their peers in other countries.

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7 Van Dick, R.; Helfritz, K. H.; Holz, F.; Stickling, E.: Digital Leadership - Die Zukunft der Führung in Unternehmen, Frankfurt 2016.

Rank	Austria	Germany	Lithuania	Netherlands	Switzerland	Other countries
1	Digital Marketing	Marketing Automation	Brand Strategy & Management	Brand Strategy & Management	Digital Marketing	Digital Marketing
2	Brand Strategy & Management	Digital Marketing Platforms (DSP, DMP)	Digital Marketing	Digital Marketing	Brand Strategy & Management	Content Marketing & Optimisation
3	Innovation, Product Development	Customer Journey Analysis (Attribution)	Innovation, Product Development	Content Marketing & Optimisation	Content Marketing & Optimisation	Brand Strategy & Management

Figure 2: The top 3 priorities in a selection of European countries in 2020 (each respondent was asked to pick their top 3 issues, n=767)

In **Austria** the main area of focus is *"Digital Marketing"* (38%), closely followed by *"Brand Strategy & Management"* (36%) and some distance ahead of *"Innovation, Product Development"* (19%). Attention to *"Big Data"* and *"Predictive Analytics"* is relatively low when compared with other countries. As in Lithuania, innovation management and the development of new products are towards the top of the agenda in 2020.

Switzerland exhibits similar priorities to those of its Alpine neighbour*: "Digital Marketing"* (34%) is set to dominate the marketing agenda in 2020, followed by *"Brand Strategy & Management"* (29%) and *"Content Marketing & Optimisation"* (23%). Comparatively few Swiss marketing executives are looking to focus on issues such as *"Big Data"* and *"Predictive Analytics"* when compared with other countries. The main items on the Swiss marketing agenda in 2020 will therefore be the shift from push marketing to pull marketing and brand promotion.

Things look completely different in the **Netherlands**: The big issues here are *"Brand Strategy"* (47%), *"Content Marketing"* and *"Digital Marketing"* (both 28%). There is a discernible lack of focus on topics such as *"Marketing Automation"* (6%) and *"Marketing Spend Optimisation"* (5%). Projects in the field of *"Big Data Analytics"* were at the top of the agenda in 2019 but are a much lower priority in 2020 (22%). They are seen as being dependent on *"Building High-Performance Teams"* (15%).

Germany paints an entirely different picture again: Here it is "*Marketing Automation"* (38%), *"Digital Marketing Platforms"* (38%) and *"Customer Journey Analysis/Attribution"* (28%) that enjoy top priority, followed by *"Digital Marketing in total"* and *"Brand Strategy and Management"*. As in other countries, key supporting measures are set to include *"Building High-Performance Teams"* (17%). In 2020 the German marketing environment will once again be dominated by the establishment of suitable platforms and structures in the field of marketing technology – an area in which there is a clear and statistically

significant amount of water between Germany and other European countries.

Aggregation of the highest priorities throughout Europe puts the topic of *"Data Management"* at the top of the agenda (63%) followed by *"Digital Technologies"* (59%), *"Strategy"* in general (55%), *"Organisation and Processes"* (52%) and *"Channel Management"* (37%). As is to be expected on that basis, the greatest challenges faced are all linked to the issue of *"Data"* and associated measures, for example (also see Figure 2):

- The consolidation of all existing and newly generated **data sets**;
- The definition of a clear, targeted **marketing strategy**;
- The establishment of a **consistent customer experience** across all touchpoints;
- The use of **change management** to remould the existing organisation in terms of working methods, the use of IT applications and cross-functional cooperation;
- The simultaneous establishment of a shared understanding of the importance of **data-driven marketing**.

Issues such as:
- Gaining the requisite level of experience in the field of digitalisation, and in particular the successful combination of specialist and IT expertise;
- The recruitment of employees with relevant know-how; and
- The establishment of modern working structures according to the principle of new work, which includes elements such as self-determination, democratic leadership structures, creative workspaces, rapid/agile decision-making processes and flexible working models

are given lower priority in 2020 than in 2019. It appears that they tend to only be seen as a foundation for the tackling of upcoming operational challenges.

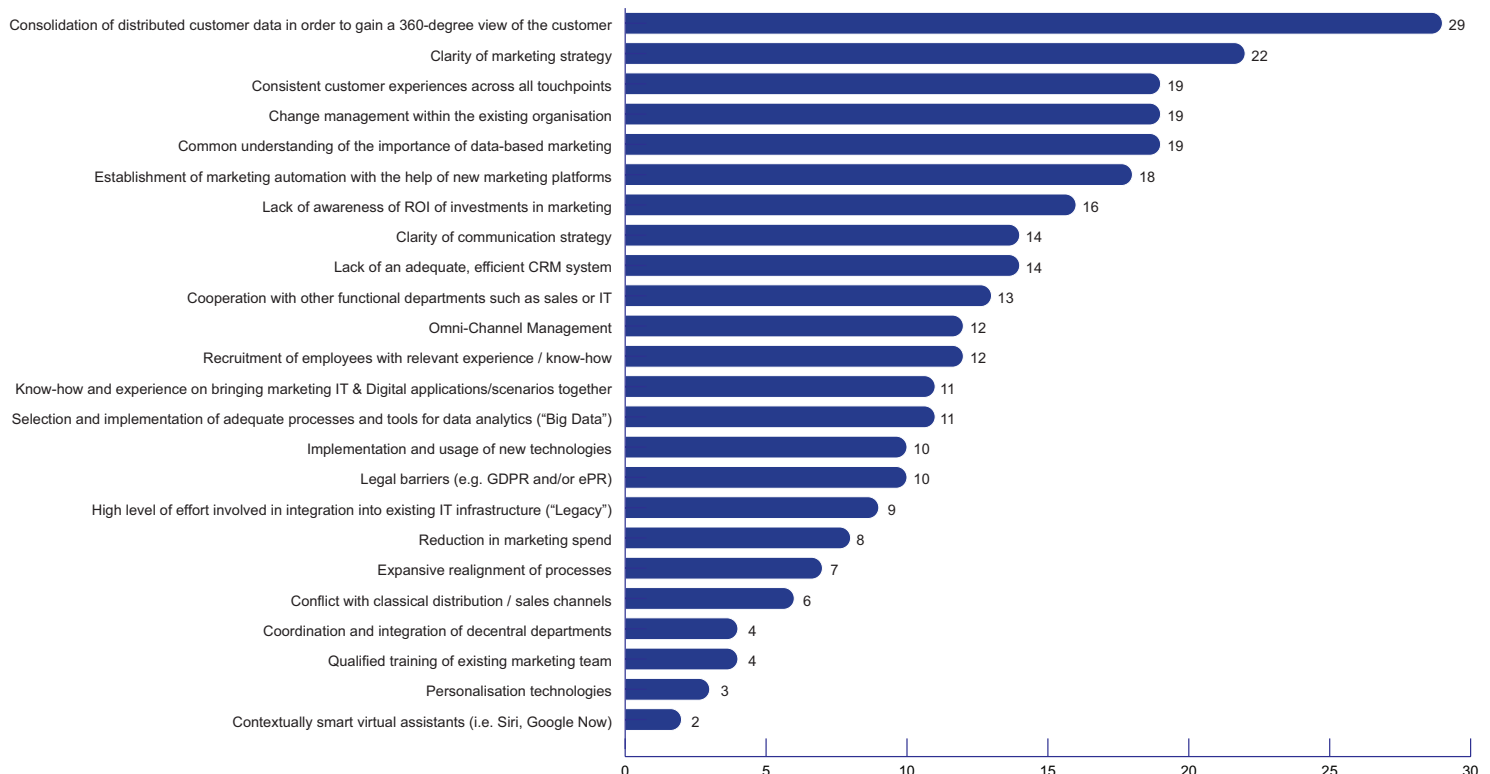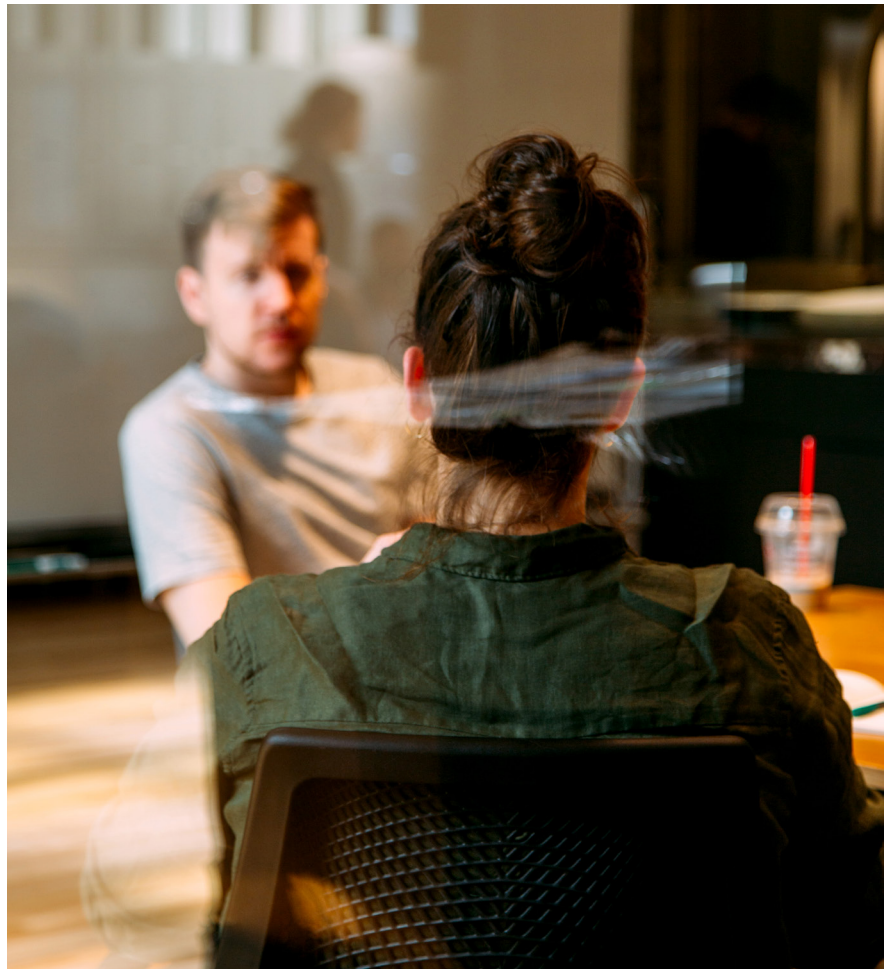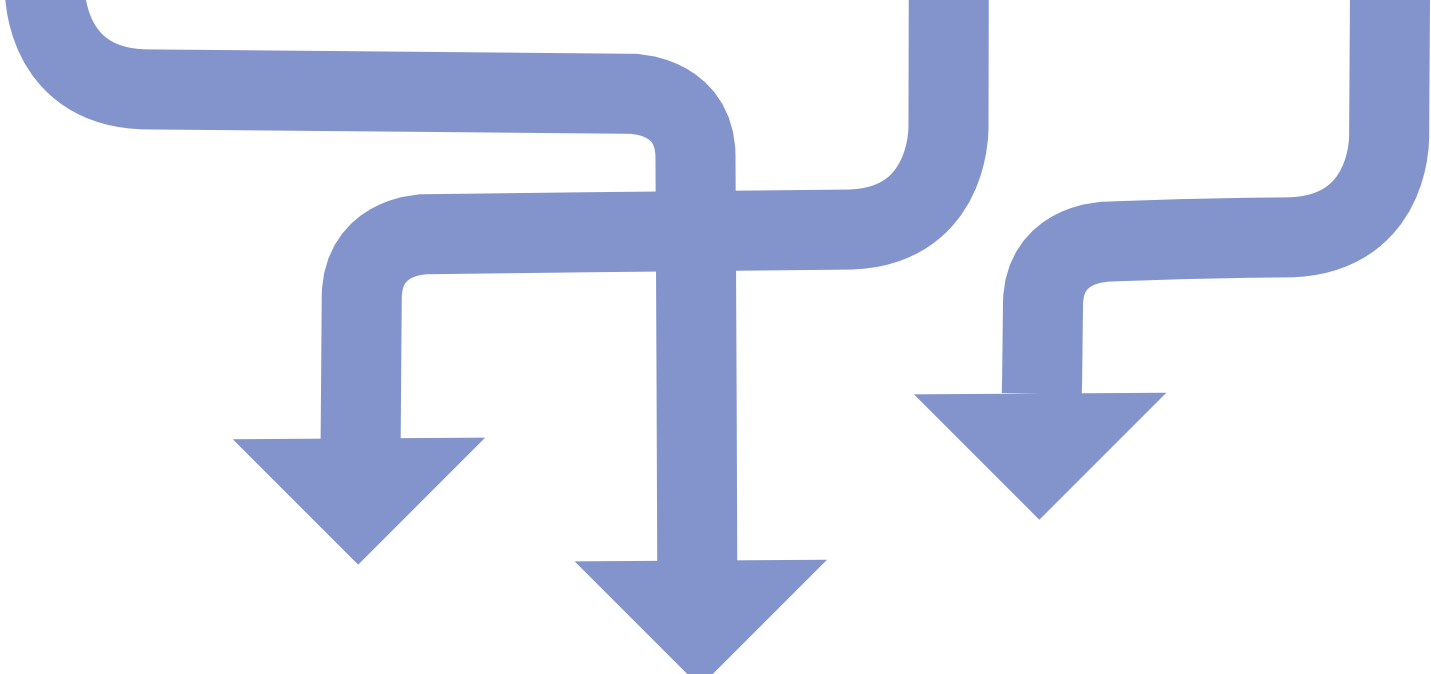| Challenge	Value
Consolidation of distributed customer data in order to gain a 360-degree view of the customer	29
Clarity of marketing strategy	22
Consistent customer experiences across all touchpoints	19
Change management within the existing organisation	19
Common understanding of the importance of data-based marketing	19
Establishment of marketing automation with the help of new marketing platforms	18
Lack of awareness of ROI of investments in marketing	16
Clarity of communication strategy	14
Lack of an adequate, efficient CRM system	14
Cooperation with other functional departments such as sales or IT	13
Omni-Channel Management	12
Recruitment of employees with relevant experience / know-how	12
Know-how and experience on bringing marketing IT & Digital applications/scenarios together	11
Selection and implementation of adequate processes and tools for data analytics ("Big Data")	11
Implementation and usage of new technologies	10
Legal barriers (e.g. GDPR and/or ePR)	10
High level of effort involved in integration into existing IT infrastructure ("Legacy")	9
Reduction in marketing spend	8
Expansive realignment of processes	7
Conflict with classical distribution / sales channels	6
Coordination and integration of decentral departments	4
Qualified training of existing marketing team	4
Personalisation technologies	3
Contextually smart virtual assistants (i.e. Siri, Google Now)	2

Figure 3: The top 3 challenges faced in Europe in 2020 (each respondent was asked to pick their top 3 issues, in %, n=767)

As in previous years there are substantial differences around Europe (see Figure 4): In **Lithuania** the key challenges include *"Lack of awareness of ROI of investments in marketing"* (32%), *"Clarity of marketing strategy"* (20%) and *"Change management within the existing organisation"* (20%). As such, the Lithuanian marketing environment is characterised by conflict between the implementation of innovative marketing & sales concepts on the one hand and challenges involving strategy and organisational issues on the other.

Rank	Austria	Germany	Lithuania	Netherlands	Switzerland	Other countries
1	Clarity of marketing strategy	Consolidation of distributed customer data in order to gain a 360-degree view of the customer	Lack of awareness of ROI of investments in marketing	Clarity of marketing strategy	Consolidation of distributed customer data in order to gain a 360-degree view of the customer	Coordination and integration of decentral departments
2	Clarity of communication strategy	Common understanding of the importance of data-based marketing	Change management within the existing organisation	Lack of awareness of ROI of investments in marketing	Clarity of marketing strategy	Clarity of marketing strategy
3	Change management within the existing organisation	Establishment of marketing automation with the help of new marketing platforms	Clarity of marketing strategy	Change management within the existing organisation	Consistent customer experiences across all touchpoints	Lack of awareness of ROI of investments in marketing

Figure 4: The top 3 challenges faced in a selection of European countries in 2020 (each respondent was asked to pick their top 3 issues, n=767)

Senior marketing executives from the **Netherlands** gave a very similar response: The highest ranked challenges are *"Clarity of marketing strategy"* (46%), *"Lack of awareness of ROI of investments in marketing"* (28%) and *"Change management within the existing organisation"* (24%). Here again, implementation is less hampered by the functionality of individual tools than by issues associated with existing organisational structures, processes and systems.

As in previous years, the primary challenge in **Germany** is the *"Consolidation of distributed customer data in order to gain a 360-degree view of the customer"* (39%) followed by the establishment of a *"Common understanding of the importance of data-based marketing"* (31%) and the *"Establishment of marketing automation with the help of new marketing platforms"* (29%). Know-how and experience of bringing marketing, IT and other areas together for digital applications overshadows other challenges in this area and tends to focus on marketing automation. MarketingTech platforms and the implementation (i.e. integration) thereof are therefore among the top priorities.
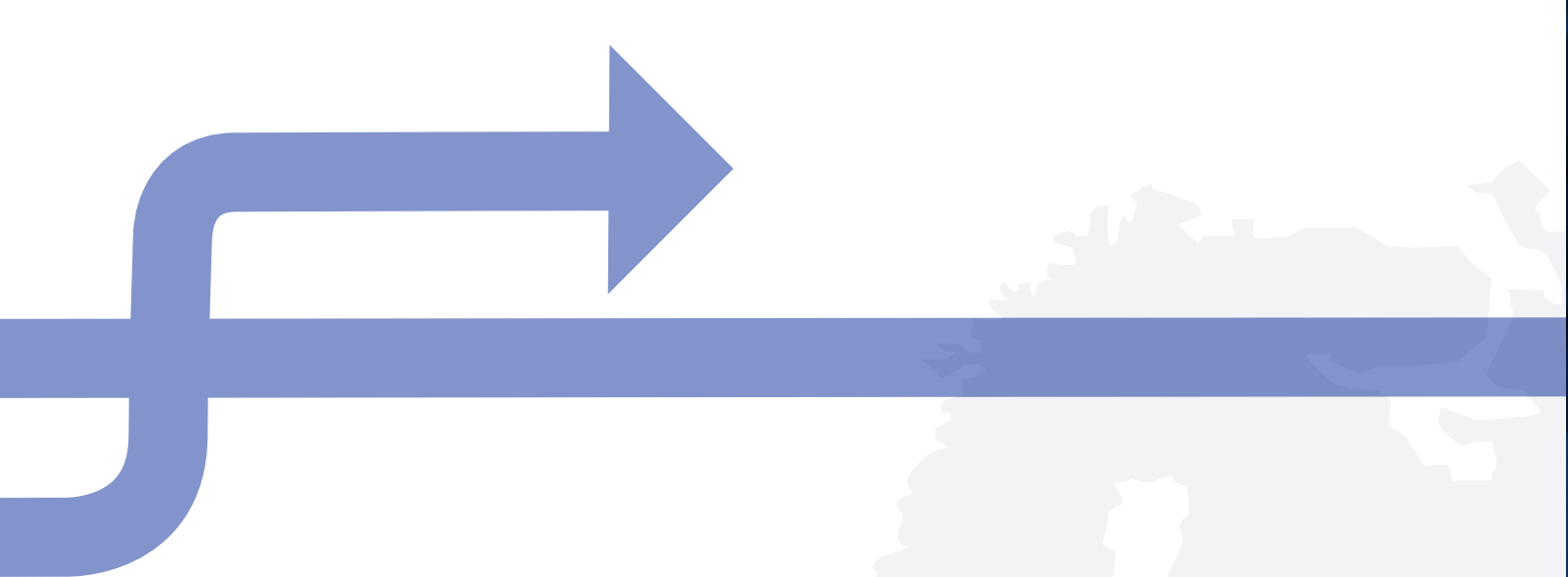
A similar situation can be observed slightly further south in **Switzerland**: Swiss marketing and sales managers see the *"Consolidation of distributed customer data in order to gain a 360-degree view of the customer"* (30%), *"Clarity of marketing strategy"* (26%) and the creation of *"Consistent customer experiences across all touchpoints"* (21%) as their top three challenges.

Things look entirely different in neighbouring **Austria**: The list of challenges faced is topped by the abstract concept of "ensuring clarity" (*"Clarity of marketing strategy"* (24%) and *"Clarity of marketing strategy"* (23%)), which is followed by *"Change management within the existing organisation"* (23%). It appears that a desire for clearly formulated goals and strategies is prioritised over the discussion of operational instruments.

Marketing and sales executives throughout Europe (continue to) regard **digital disruption** as one of the most important management trends (see Fig. 5). This includes all attempts to establish new business models and disrupt entire market structures. The main area of focus is generally the continued achievement of profitable growth, the establishment of novel business models and diversification. Top-of-mind awareness is

dominated by the redefinition of existing market structures, not least because of success stories such as *AirBnB*, *Uber* and *Spotify*. The topics of *"Future of Learning"* and *"New Work"* go hand-in-hand with the challenge of recruiting digital natives and largely self-managing senior professionals who fail – or are entirely unable – to comply with standard recruitment criteria and processes because

- Such formal processes tend to favour the repeated recruitment of the same type of **(stereo)typical "clones"** with similar educational and social backgrounds;
- **Employer branding** continues to face large and medium-sized companies alike with the challenge of using their company's "sex appeal" to attract young talent. Whereas previous generations sought job security and a handsome salary above all else, younger generations place a different set of demands on their employer, for example flexible working hours, opportunities for learning and personal development and the implementation of the latest findings in the field of occupational psychology.

It is against this backdrop that the theme and guiding principle of the European Marketing Agenda 2020 will be:

Me.Unlimited.

This theme is based on the notion that marketing – in the sense of market-oriented management – must create a foundation that enables the clear, consistent design of interaction with hyper-individualised customers. In particular, it is no longer sufficient to simply think about the "customer in general" as an abstract concept. Sales figures and sustainable success on the market stand in direct correlation with the ability to individualise the customer experience consistently, to an extremely high degree, in keeping with the respective context and across all touchpoints.
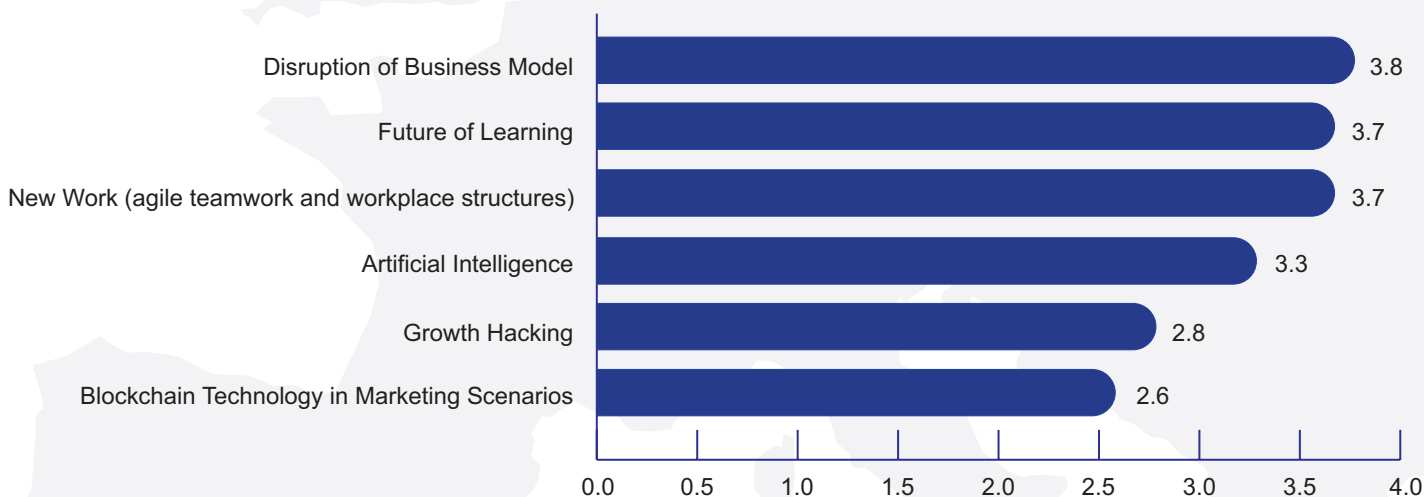

Figure 5: Average ratings between 1-5: The most important management trends in the field of marketing in Europe in 2020 (sum of statements "fairly important" and "very important", in %, n=767)

"
The establishment of modern working structures according to the principle of new work, which includes elements such as self-determination, democratic leadership structures, creative workspaces, rapid/agile decision-making processes and flexible working models

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