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2021 advocate marketing global survey

the state of the customer reference/advocacy profession

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welcome



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the 2021 'covid' edition

We're super-proud of this year's survey; created in a time of challenge and change. Massive thanks to everyone that participated, we truly hope you gain something of value. Looking at the data, common questions, and the larger social context we see the need to follow-up with two special reports;

- Diversity in advocate marketing
- Tech solutions stack used in advocate marketing

If you'd like to see any other deep-dive please contact us.

Enjoy!

about the survey

The 2021 advocate marketing global survey continues our quest to better understand the current state of the advocacy marketing profession, specifically customer reference and advocacy programs.

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

As with advocate marketing academy, this survey is proudly powered by inEvidence.

methodology

This non-incentivized survey was carried out using an online survey tool; the number of questions deliberately limited to a) respect everyone's time, and b) encourage a statistically valid number of responses.

The survey was opened 258 times; responses were then checked to ensure they were complete and valid from people working in the industry. This resulted in 120 clean, complete and verified responses.

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

executive summary

the big 5 takeaways



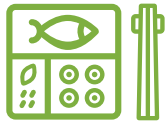
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1. it's hot here

Customer advocacy programs have never been hotter; 35% of program budgets are up, 42% are flat and only 15% are down. More than this, a staggering 87% of responders say their organizations view their programs as more important than in 2019.

The industry is buoyant and talent is in short supply. When one considers that advocate marketing centers on the energy of happy customers chatting in their workplaces, or speaking at events, this result is even more remarkable.



2. BoM tastic

but not bombastic.

The days of having a big stack of printed 4pg PDF case studies are gone; video, then social, changed all of that.

The story BoM (Bill of Materials) is now a reality, with 6 story formats created on average; amplified though 9 channels.

79% of advocacy pros are now creating video; more than other format, and many new story types are cut-downs; shorter-form versions of a master story.



3. DE&I. work to do

People trust people 'just like them', thus effective advocacy programs reflect their community. Women comprise the majority of marketers; within advocacy it's 72%. The split is a strong 68% at Director level, vs. 58% at Manager level.

A mere 15% of advocacy pros measure advocate diversity and sadly, only 35% are actively considering story accessibility.

We've only scratched the surface on this topic and are committed to delving more deeply.



4. next 12mo focus

Top focus areas for the next year, selected by responders are:

- 1) Creating customer story BoMs: same story, different formats (41%).
- 2) Implementing global standards: for stories and processes (38%).
- 3) Creating more visual content: animation, video etc (36%).
- 4) Building /maintaining customer communities: hubs, groups (33%).
- 5) Perspectives storytelling: same story different angles (32%).



5. covid impacts

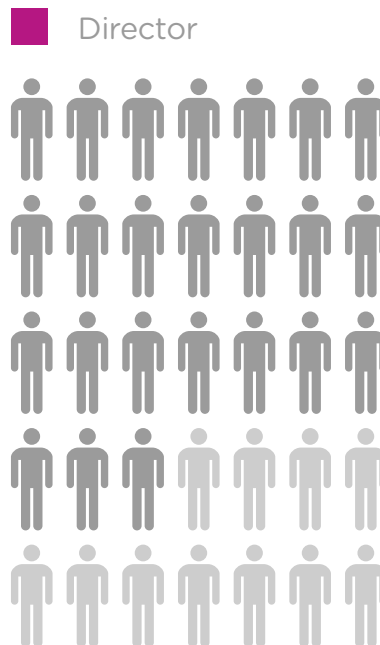
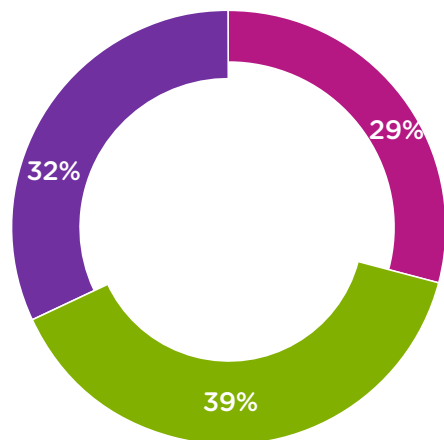
Outside of the incalculable human cost, 67% of advocacy professionals cite an inability to travel as the biggest negative impact that covid has had on programs, closely followed by live event cancellation (63%) and the unavailability of customers (58%).

On a more positive note, 61% see positives in how tech enables collaboration, 46% can be more productive, and the same percentage appreciate the ecological impact of lower CO₂ emissions.

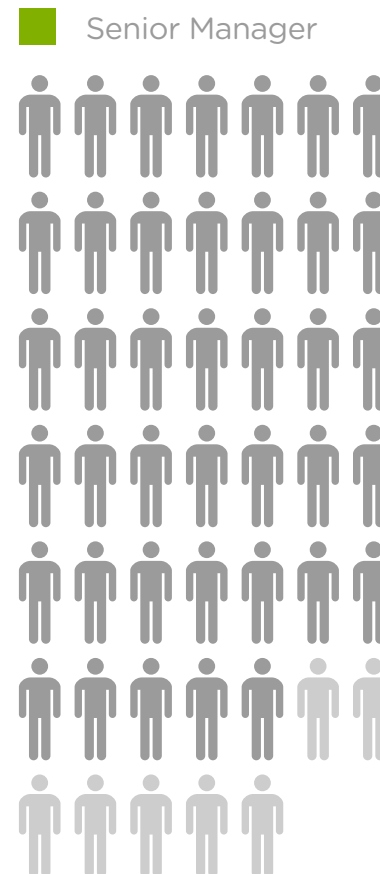
who responded



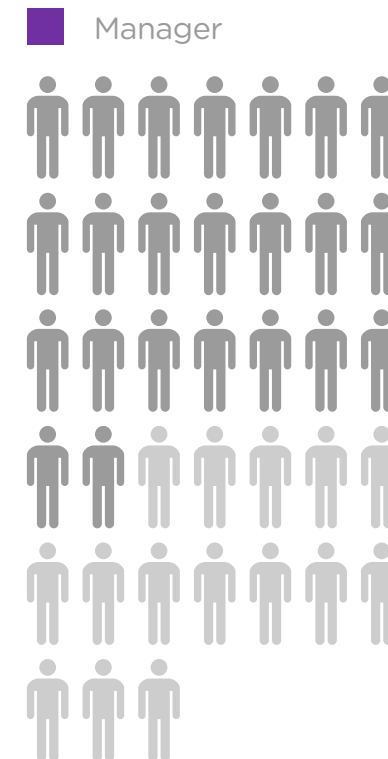
- Verified responses were placed into three job levels; Director, Senior Manager and Manager
- There was solid representation across the spectrum; and an impressive percentage of female leadership within our discipline; even stronger at the Director level than Manager level
- 56% have a global remit, 28% regional and 16% country or specific industry



35 responders | 68% female



47 responders | 85% female



38 responders | 58% female



81 discrete programs, 65 brands, 4 regions

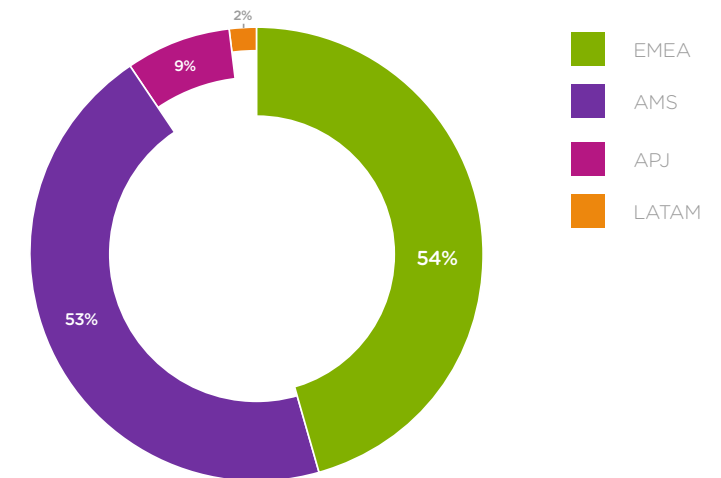
participating organizations include;

- | | | | |
|-----------------------|------------------------------|----------------------------|-----------------|
| ■ Accenture | ■ Ensono | ■ O2 | ■ Smartsheet |
| ■ Access Group | ■ EnterpriseDB | ■ Okta, Inc. | ■ Snow Software |
| ■ Amazon Web Services | ■ Fujitsu | ■ Opentext | ■ Snowflake |
| ■ Anaplan | ■ Google | ■ Oracle | ■ Stibo Systems |
| ■ Aruba Networks | ■ Hewlett Packard Enterprise | ■ Oracle Netsuite | ■ Tableau |
| ■ AT&T Cybersecurity | ■ Hitachi Vantara | ■ Orange Business Services | ■ Tanium |
| ■ Autodesk | ■ Hootsuite | ■ Outsystems | ■ Telefónica |
| ■ CDW | ■ HP | ■ Palo Alto Networks | ■ UKG |
| ■ Check Point | ■ Innovate UK | ■ Qlik | ■ VMware |
| ■ Cisco | ■ Intel | ■ Red Hat | ■ Waters |
| ■ Citrix | ■ Kaspersky | ■ Salesforce | ■ Workday |
| ■ Couchbase | ■ Lexia Learning | ■ SAP Concur | |
| ■ CPA Global | ■ Micro Focus | ■ ServiceNow | |
| ■ Dell Boomi | ■ NextGen Healthcare | ■ Sitecore | |
| ■ Egnyte | | | |

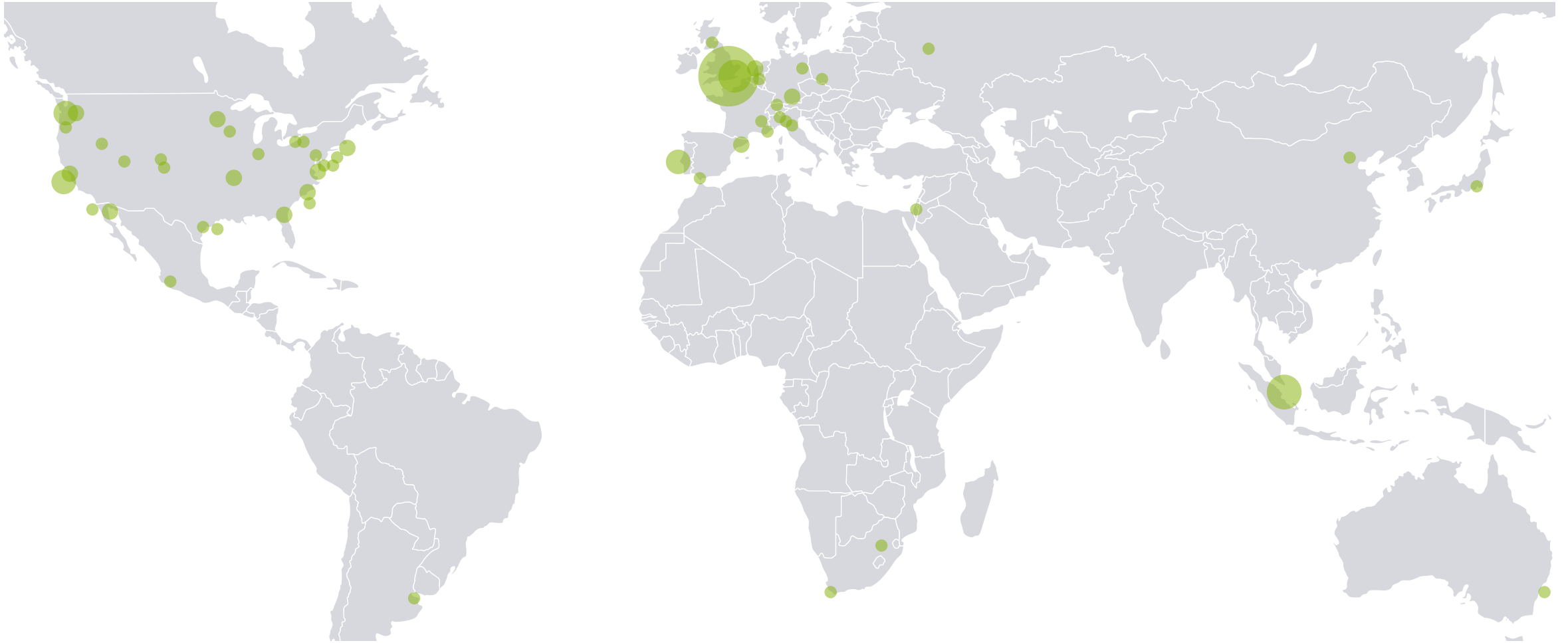
On behalf of the entire community please can we say

a massive thank you

to everyone that participated. With 120 complete responses across 24 countries in four regions this is the largest and most statistically-valid survey to date. That said, we're disappointed we could not obtain more responses from APJ and LATAM. Next time!



79 locations, 24 countries





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scope

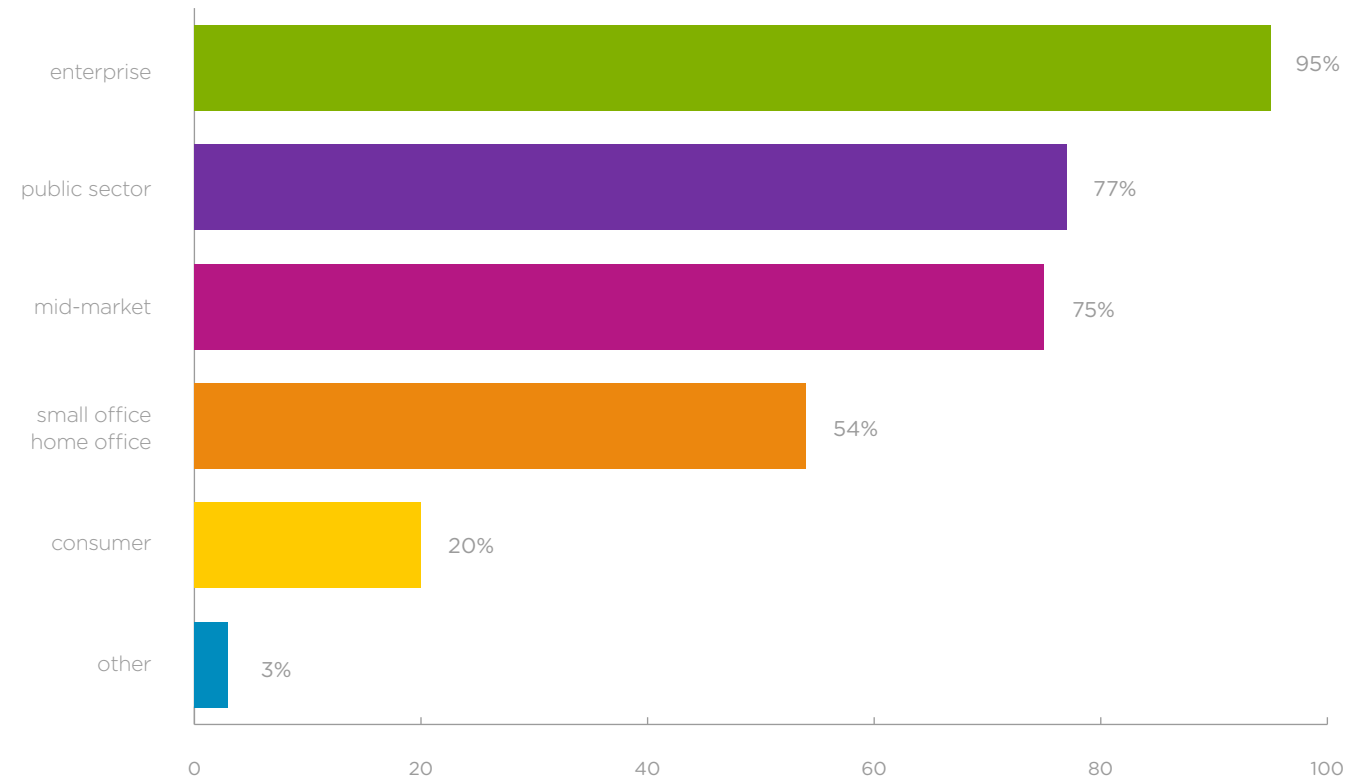
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still a b2b world

q1: which customer segments does your program support?

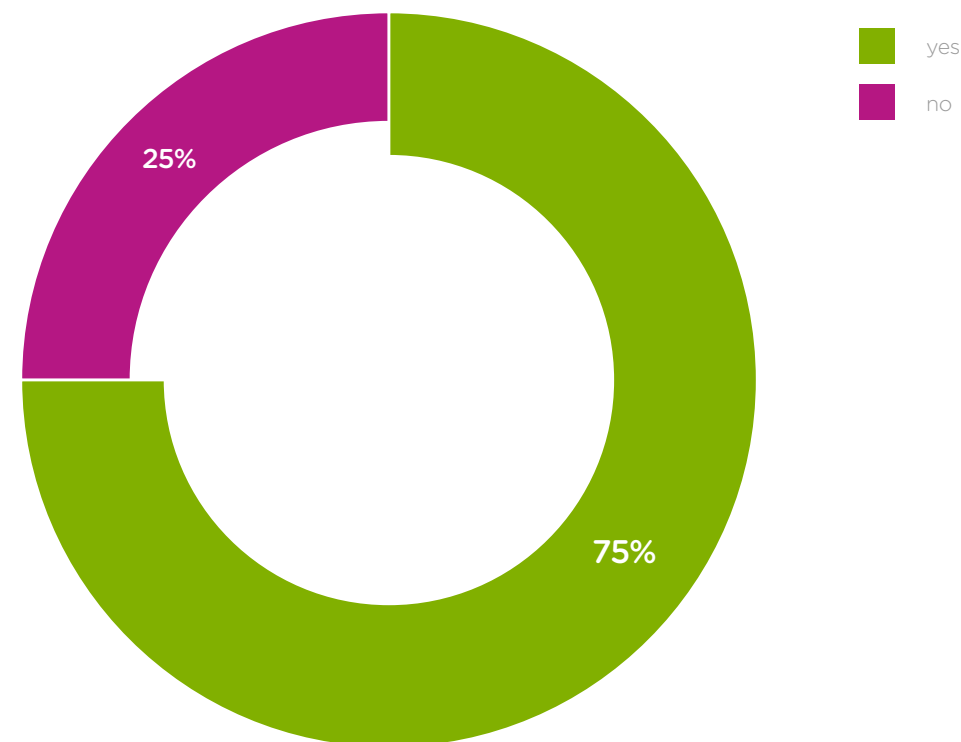
- Results are as expected with the size and type of organizations that responded
- The usual enterprise, public-sector and mid-market bias is evident, however, note that the mid-market has more than doubled in the past 9 years
- Consumer remains the smallest main segment
- 'Other' includes industry focus outside of the above



channel no.75

q2: does your program support partners as well as direct accounts?

- Supporting partners was a much lower focus in our surveys until 2019; moving to around 75% of programs and staying there ever since
- Working with partners can be tricky for some programs, and is often time consuming, yet it can be considered that supporting partners is a good training ground for the mind shift required to move from 'Reference' to 'Advocacy'
- This move brings the realization that it's not 'all about you' and it's possible to create a story, or support a sales motion, that can benefit the customer, your organization, and a partner

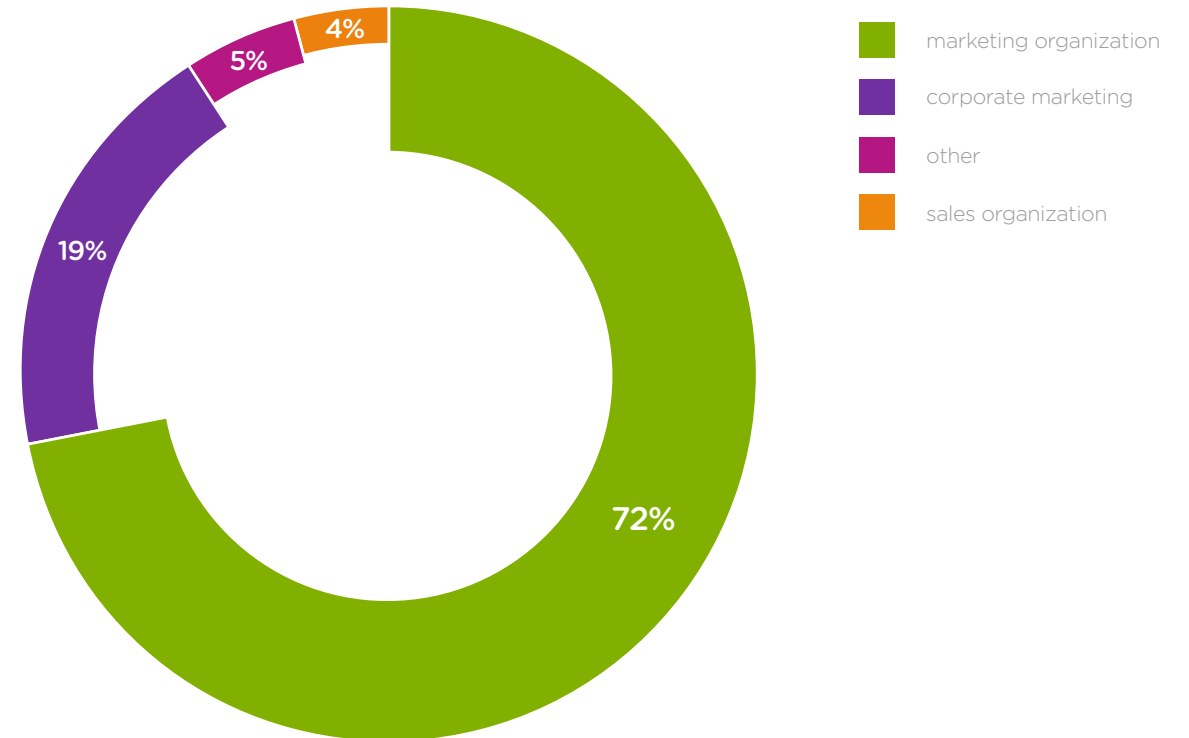




orange segment small; not yet juicy

q3: where does your program sit within your organization?

- Programs sitting within the sales organization have doubled but still only represent 4%, which is interesting when one considers sales is the largest user of references
- No other trends are to be gleaned from this chart; the position of reference/advocacy programs within organizations remains virtually static
- The 'other' segment at 5% includes Product Marketing, the Communications team, and Operations

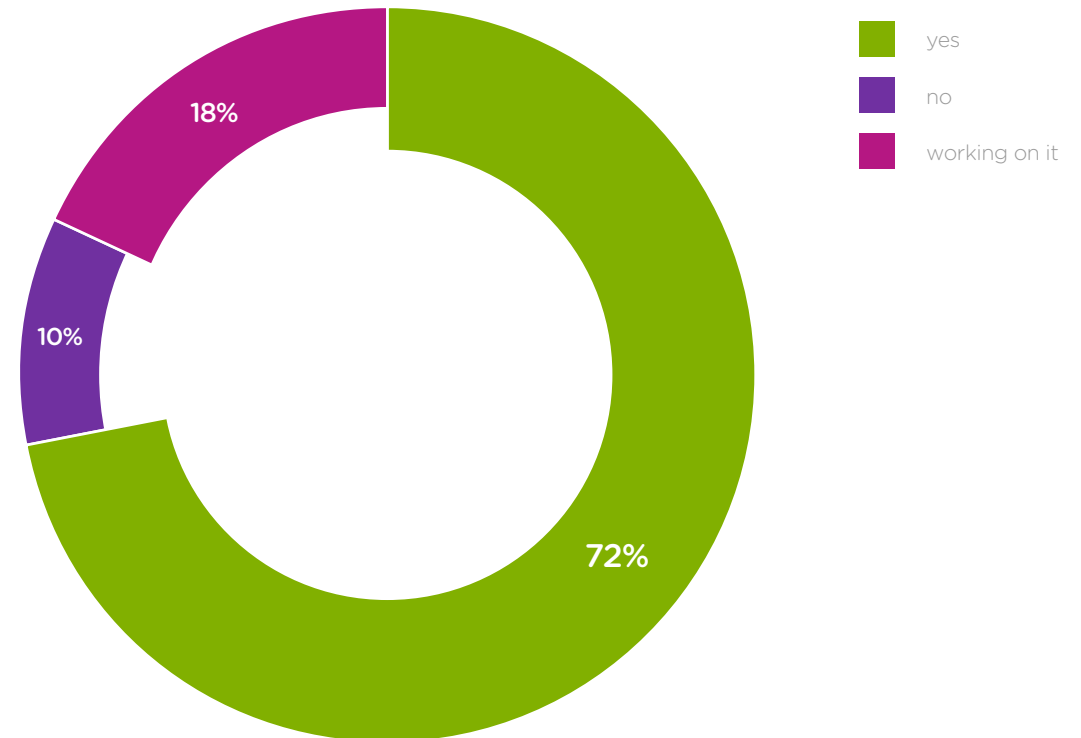




we're not holding our breath waiting for the logo

q4: do you have a branded, external, customer reference/advocacy program?

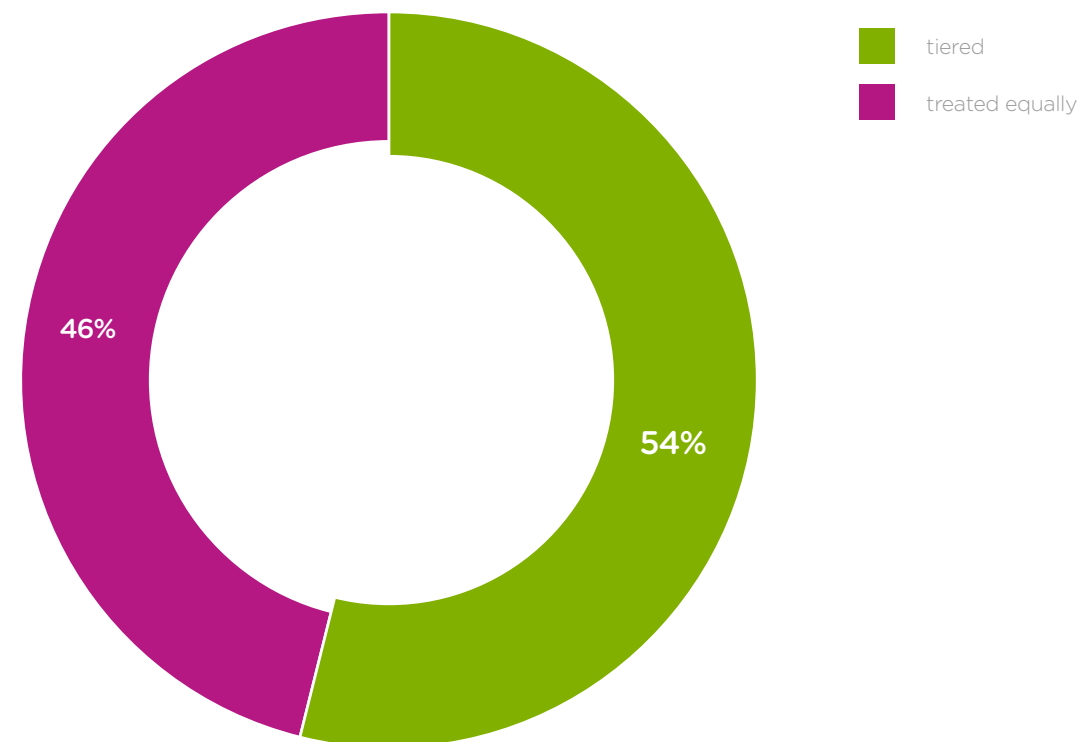
- Sure, we should have got the results of this survey out a little earlier, but come on! It's two years later and we could almost have cut-and-pasted the results from the 2019 edition of this survey. On closer examination it appears the same 18% or so of responders are still 'working on' launching their branded, external program
- What's the hold up? When we've seen a growth in communities over the last five years or so this result is even more surprising
- Same for the movement from Reference to Advocacy; still cited as a focus by customer advocacy pros. Advocacy programs are often based on a SANE methodology (Status, Access, Networking & Education); so advocates wish to 'belong'. Surely a branded, external program is part of that strategy?



tiers roll down

q5: do you tier your advocates, or are they treated equally?

- After hitting a high of 66% in 2019, the number of programs that tier their customers is reducing
- Is this a case of egalitarianism, program simplification, or a fantastic value proposition now available to all?
- Tiering is still happening in more than half of the programs that responded. This makes sense; we're still seeing strong numbers of programs integrating at different levels:
 - Top end: Customer/Product Advisory boards and Account Based Marketing (ABM)
 - Low end: Technical User Groups



go large

q6: by which criteria do you tier?

- All manner of responses here. For those programs that do tier their advocates; size, brand, level of job role, industry and strategic fit seem to stand out





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integration

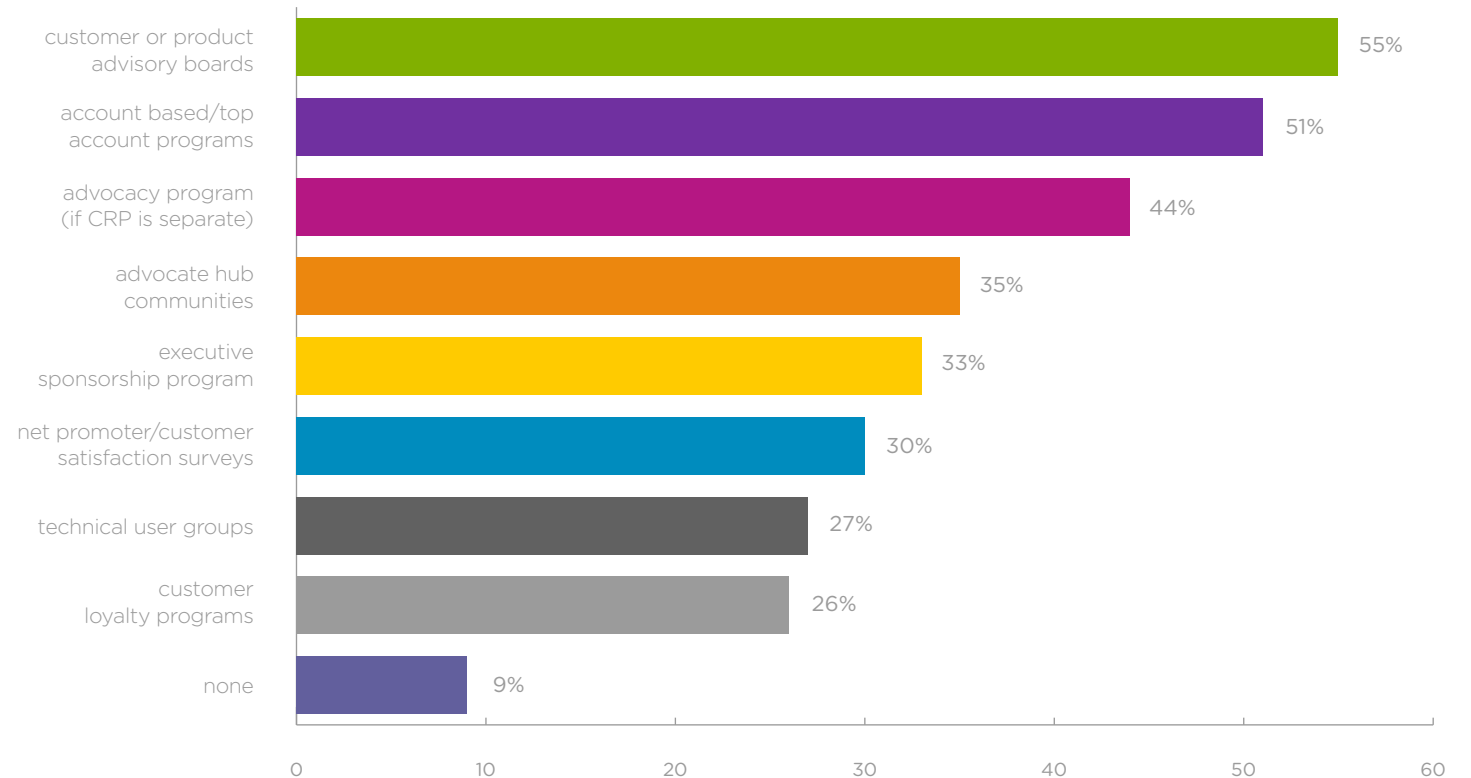
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better together

q7: which other programs does yours integrate with?

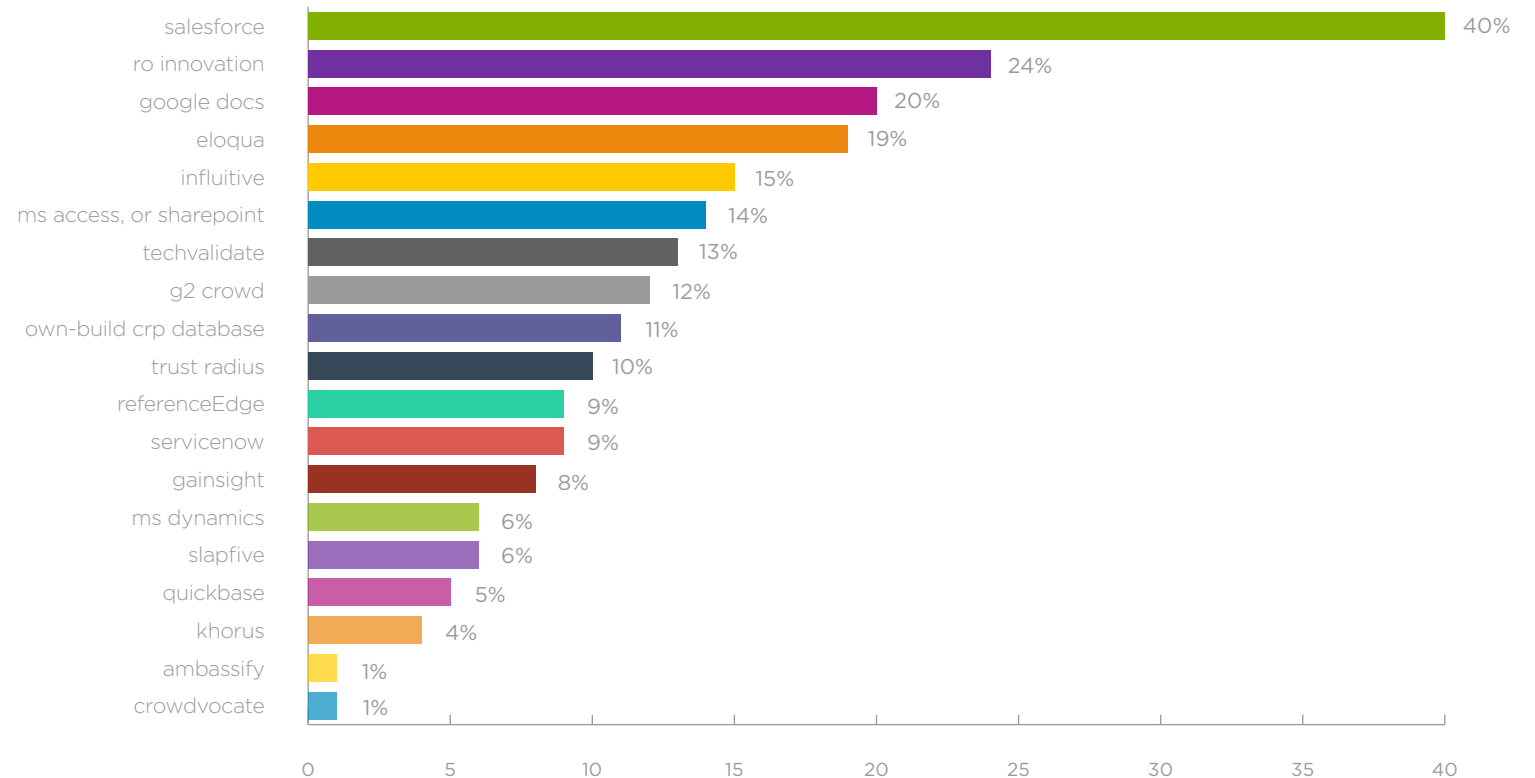
- Within programs that integrate, things remain largely static with good program integration at all levels
- Communities are a new option for this question and it's interesting to see some community integration with 35% of programs
- There is a slight increase in integration with account based/top account programs (ABM etc.) as well as loyalty programs, and a slight decrease in integration with Customer or Product Advisory Boards (CABs)



stack attack

q8: which of the martech apps does your program regularly utilize?

- Set to improve in future editions of the survey, here is the first attempt to understand the marketing technology solution stack employed by customer advocacy programs
- Organizations are using four of these apps on average. We intend to do a follow-up on this topic; hopefully creating a specific category-based deep-dive report
- What we've seen historically across the community and in these responses:
 - Consolidation in the market for specialist customer reference/advocacy platforms, for which there is healthy usage. Self-built tools (and spreadsheets for smaller programs) feature too
 - A growth in usage, and now the number of community apps
 - 3rd-party review apps all score about the same and are used by around 10% of responding organizations





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resources

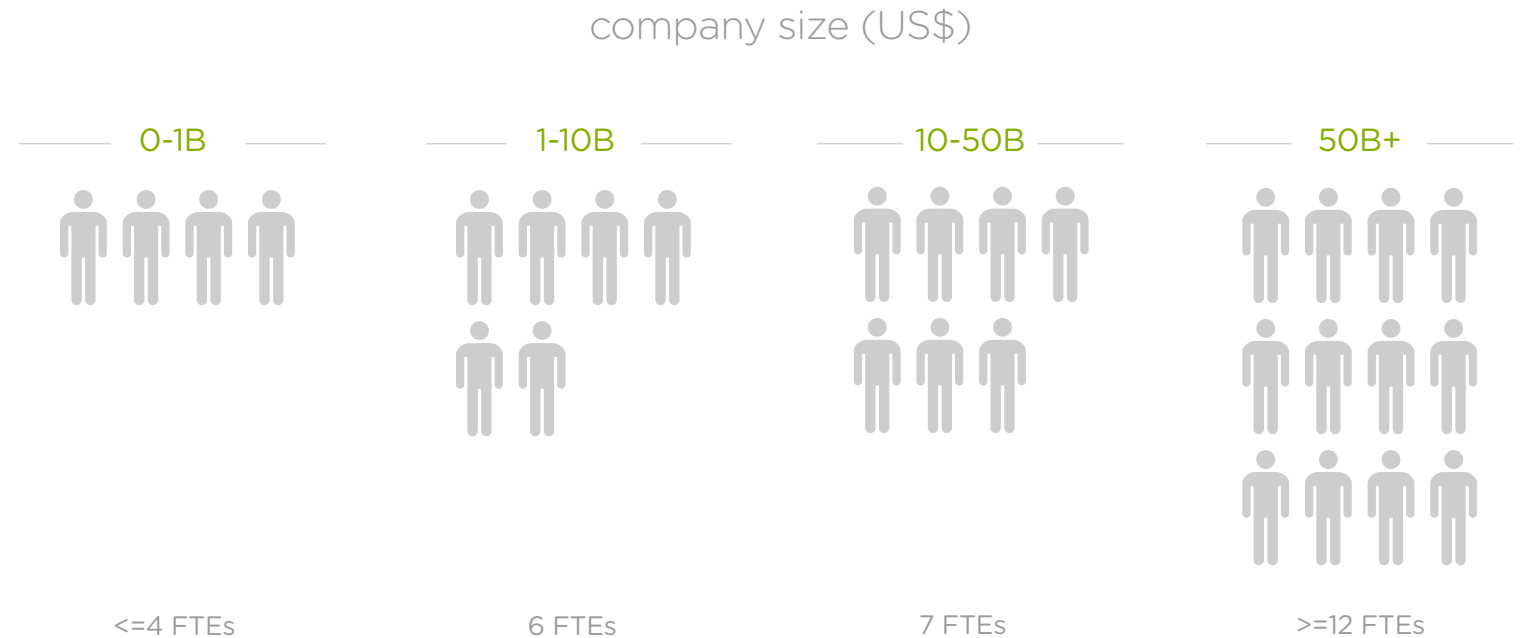
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average FTEs

q9: how many FTEs (full-time equivalent staff) does your program have? (excluding agency)

- There seems to be no hard-and-fast rule when it comes to staffing a customer advocacy program; for the first time in this survey edition we can at last see some sort of correlation between size of organization and size of team
- It's just a guide; we're all aware of one-person programs, and the occasional program with a team in excess of 30 FTEs
- When one overlays external agency resource (less for small companies, more for larger), the FTE (full-time equivalent staff) differences between varying organization sizes will be even more marked



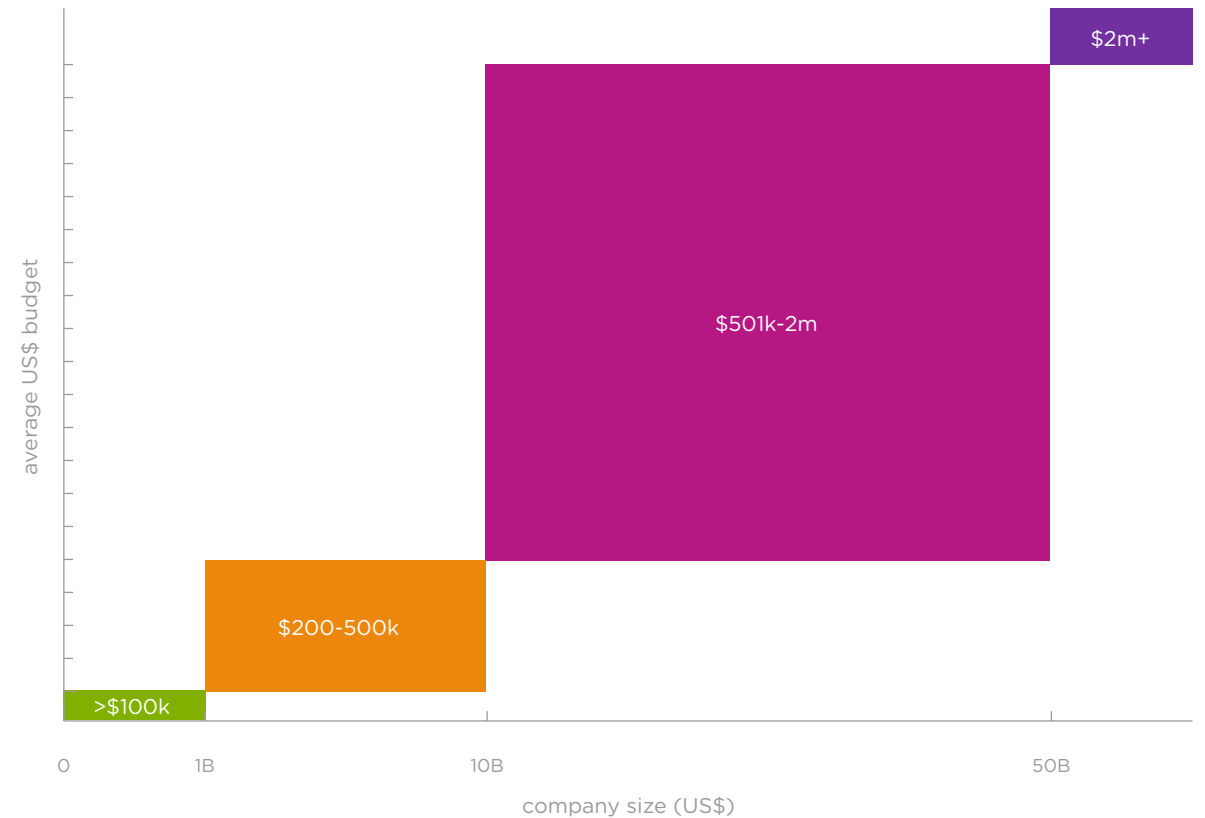
show me yours, i'll show you mine

q10: annual level of program investment, excluding people?



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- As with staffing, trying to tie levels of program investment to a percentage of organization size is more of an art than a science. This question is always a catch 22; everyone needs the answer, yet many are not able, nor comfortable to respond
- So we're even more pleased to say this question has been answered by 75% of programs. It's also good to finally see there is a correlation; even if broad
- And yes, while there are numerous programs with budgets in excess of \$1m, there are many for whom \$100k represents a sizable investment

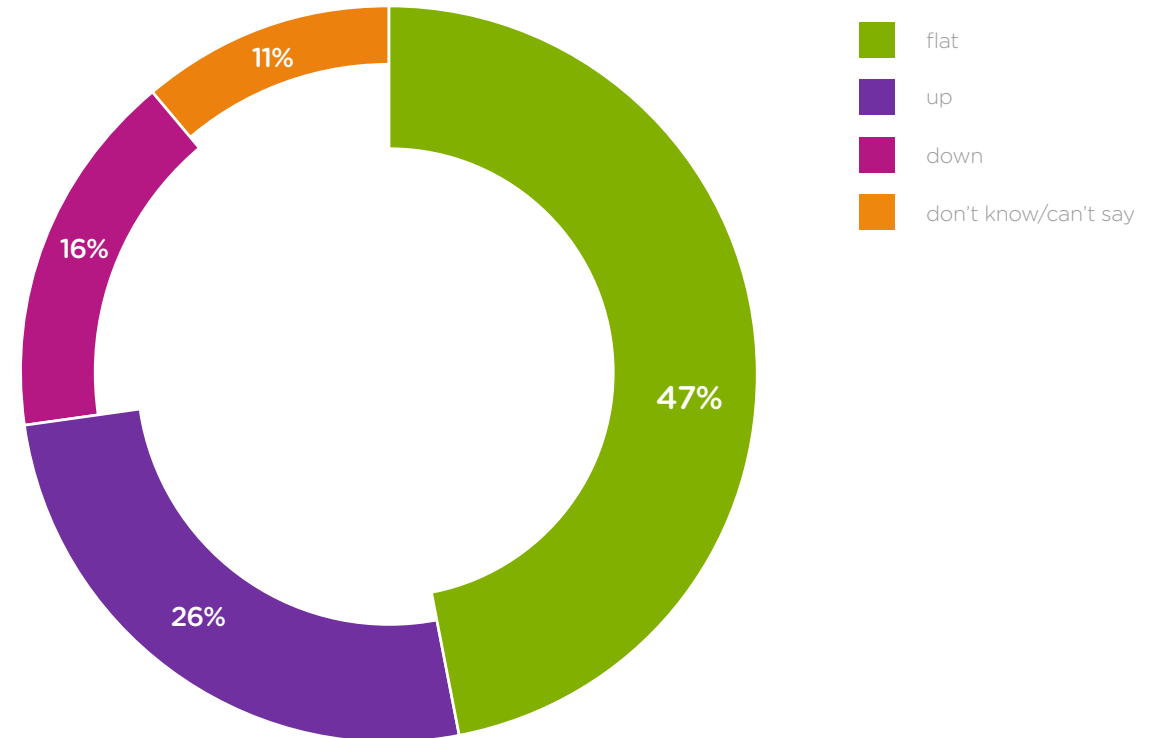




lockdown; budgets up

q11: compared to 2019, was your 2020 program budget up, flat or down?

- 26% of budgets saw an increase last year, with an additional 47% of budgets reported as flat
- Interestingly, only 16% of budgets were reported as decreasing in a year when: a) the recruitment of advocates, b) the creation of stories, and c) the closing of deals all faced enormous challenges. This is also before one factors in the cancellation of a vast number of live events
- We're always pleased to be able to talk about budgets because alongside team size, it's the no1 question the community asks us. Only 11% were not able to respond to this question

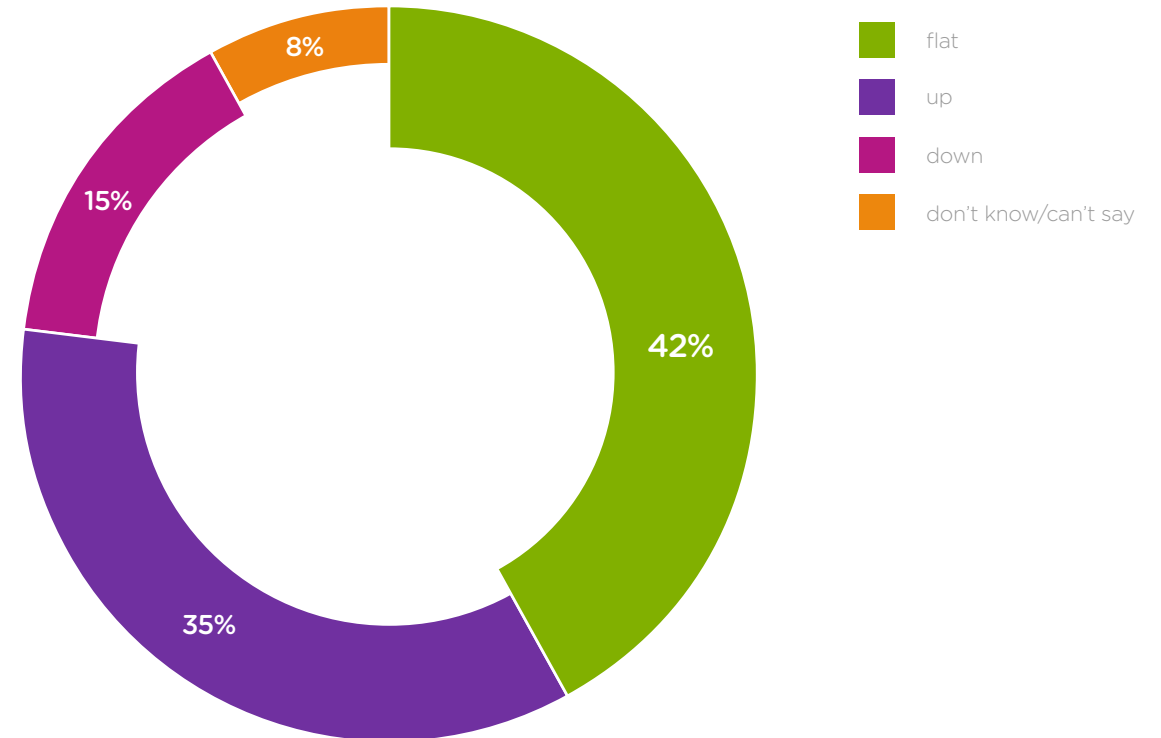




program investment continues

q12: is your 2021 program budget up, down, flat or are you unsure?

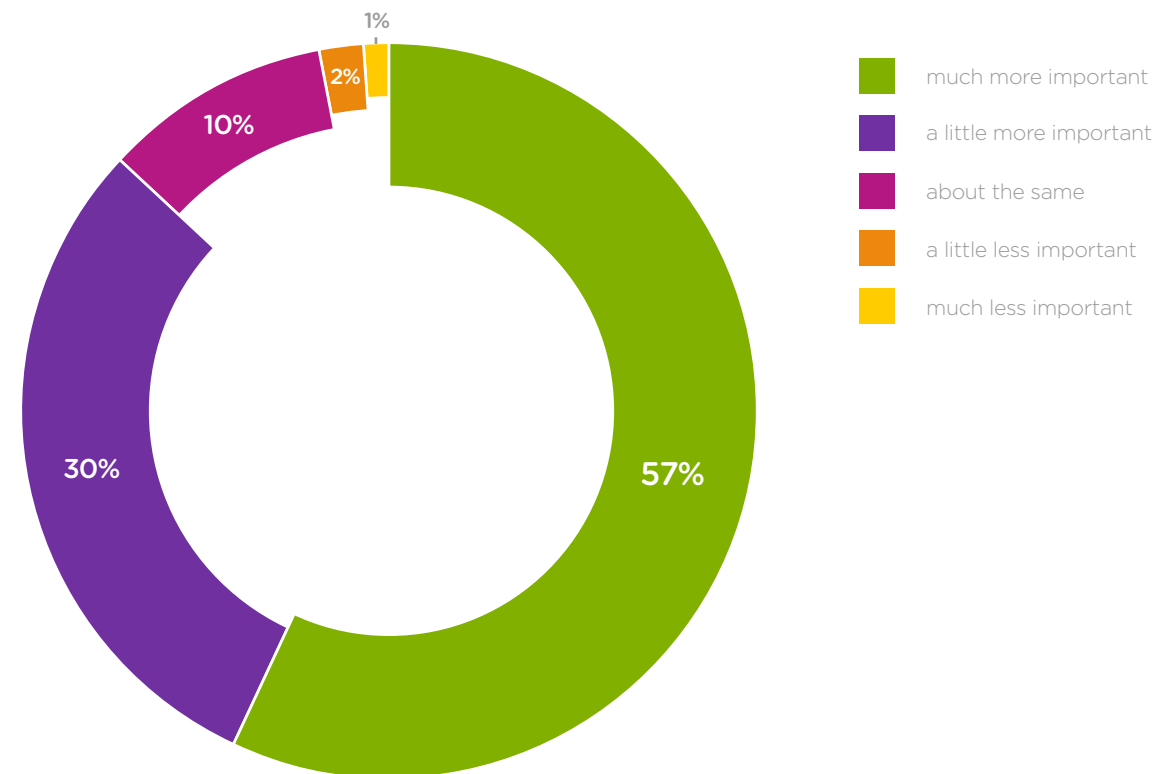
- An impressive 35% of responders report increasing 2021 budgets, while only 42% of budgets were reported as flat
- Reducing budgets are only reported by 15% of responders, and only 8% of folks were not able to respond to this question
- This result rings true with everything we are seeing across the industry; teams have seemingly never been busier. Is program importance increasing? Let's see in the answers to the next question...



you've got the love

q13: compared to two years ago, how is your program perceived internally?

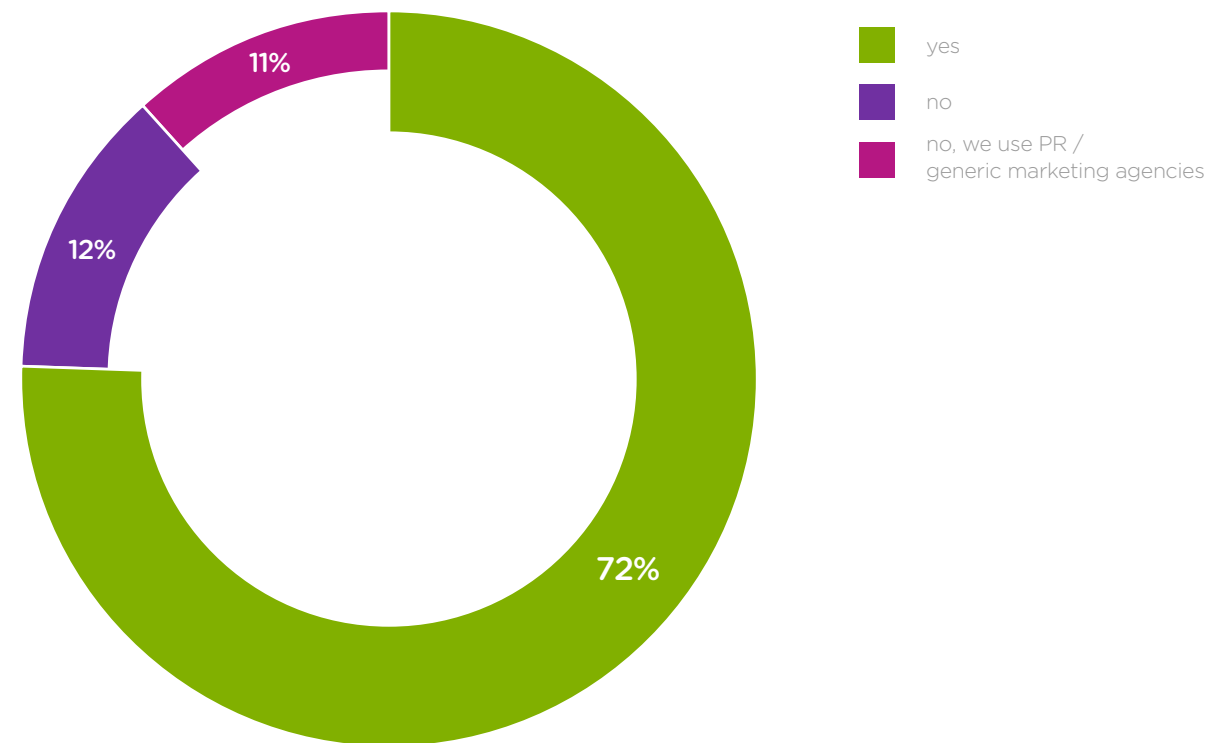
- Hang on to your hats; a staggering 87% of responders say their program is viewed as more important compared to two years ago
- 10% are seeing the same level of importance, while only 3% of responders report their programs are viewed as less important
- These results completely align with the previous budget questions. It's not mere perception; overall, organizations are putting their money where their mouths are
- It's clear to see why skilled talent is in short supply, and based on both investment and sentiment, these results seem to reconfirm advocate marketing as an excellent career choice



Speak to a specialist

q14: do you use specialist customer reference/advocacy agencies to support your program?

- 72% of responders now work with specific customer advocacy agencies, up again from 58% in 2019
- Generic/PR agency support remains the same at 12%
- The number of responders not engaging with any agencies for support has more than halved, down to 12%
- There are good reasons for this shift; the ability to flexibly increase scale and reach, also gaining access to experience, expertise and best-practice in a profession with both a skill shortage, as well as many organizations suffering headcount freezes

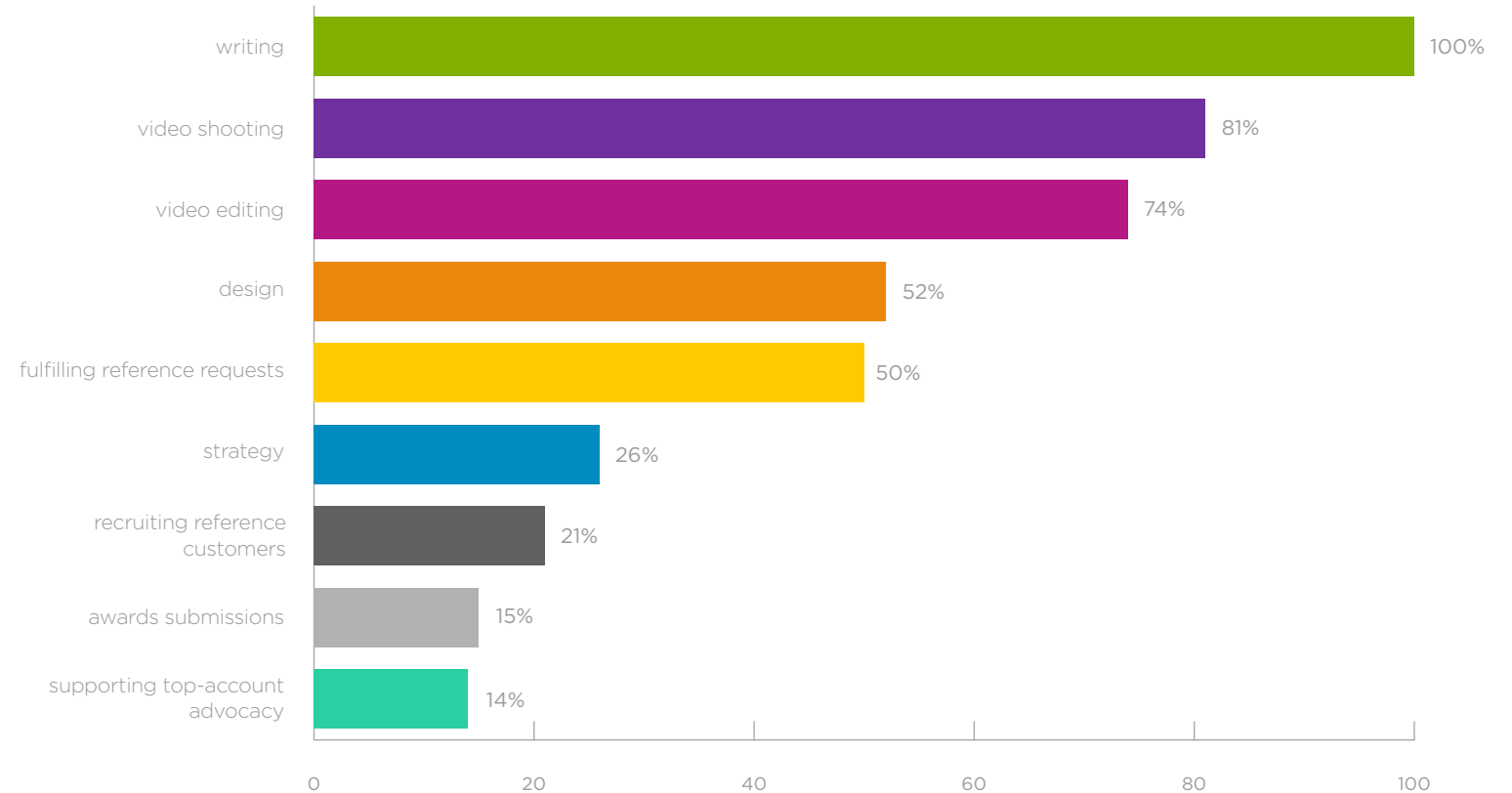


help with the heavy-lifting

legacy q from previous survey: in which areas do your agencies assist your program?

For interest, here's a chart from the 2019 survey
(dropped this year to keep the survey length manageable).
We will reintroduce this question in the next survey.

- As anticipated, 100% of organizations that use agency support said they utilize them for writing services
- Based on other answers, if this question was asked today we would expect video activities to increase somewhat from the 8 out of 10 organizations shown here
- While not on the list in the 2019 survey, we would also expect agency support for customer communities to feature strongly
- We can also see some programs utilizing external support though the whole advocacy cycle; recruit, create, fulfil, and measure, plus strategy and creative





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recruiting advocates

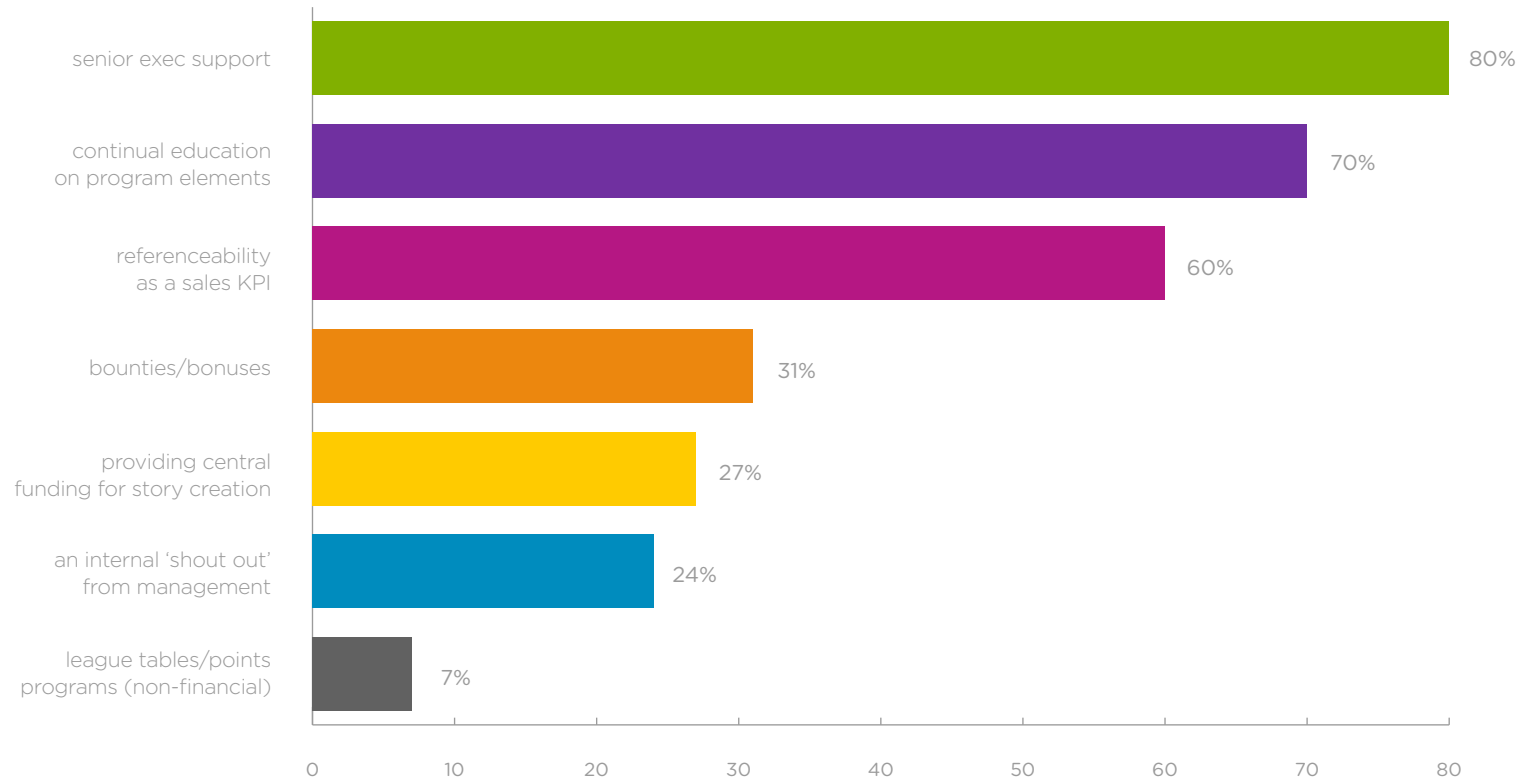
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up-levelling through c-level-ing

q15: top three methods to engage sales & marketing employees to provide reference customers

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

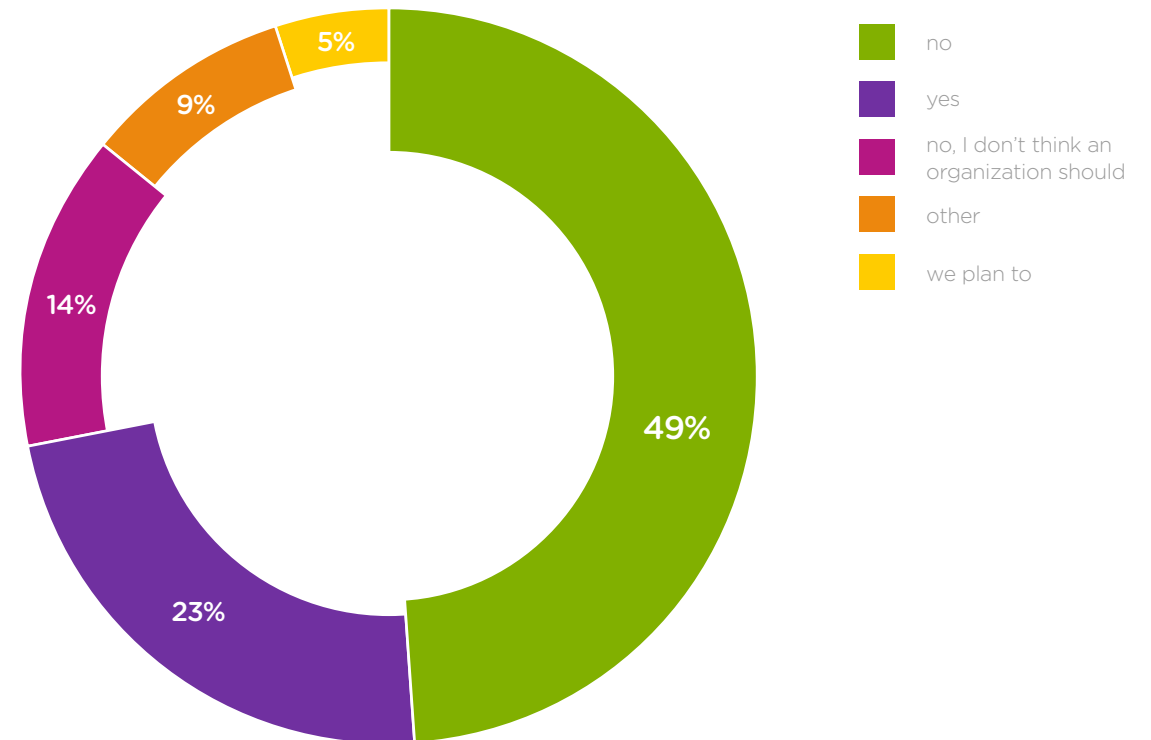




carrot or stick? stick or carrot?

q16: do you incentivise your sales teams to participate in reference activities?

- With 63% of responders not incentivising sales, or believing it should not happen at all, it's easy to see how the phrase 'it's their job, why pay them?' can be overheard occasionally when advocacy pros speak
- Yet, 28% of responders do incentivize or are planning to; a substantial percentage of the community
- Techniques mentioned include: ongoing financial incentives, redeemable points, gift cards, specific sales program incentive funds (SPIFFs), as well as recognition/kudos
- If happy customers are key to long-term growth we believe basic referenceability should be a KPI for sales; while incentives might not be the preferred route to success, we would not rule them out when targeted on specific outcomes



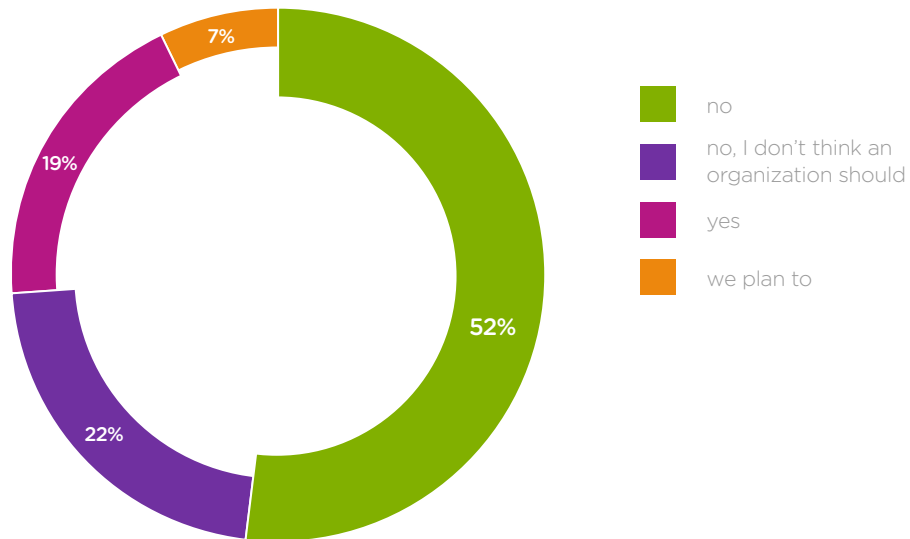


customer incentives: probably not

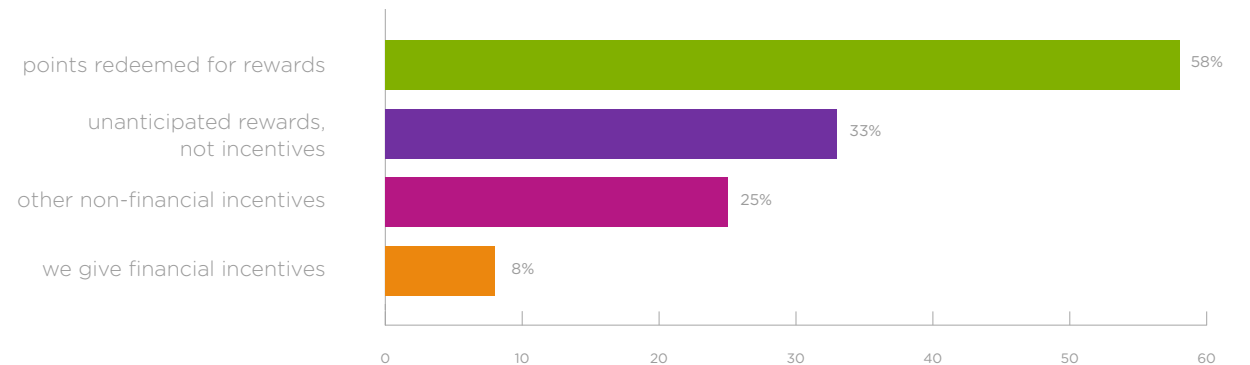
legacy q from previous survey: do you incentivize your customers to participate in reference activities?

- For context, here's a question from the 2019 survey, showing 74% of responders don't, or do not agree with incentivizing customers. We'll follow-up on this

do you incentivize?



if so; how?





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customer stories

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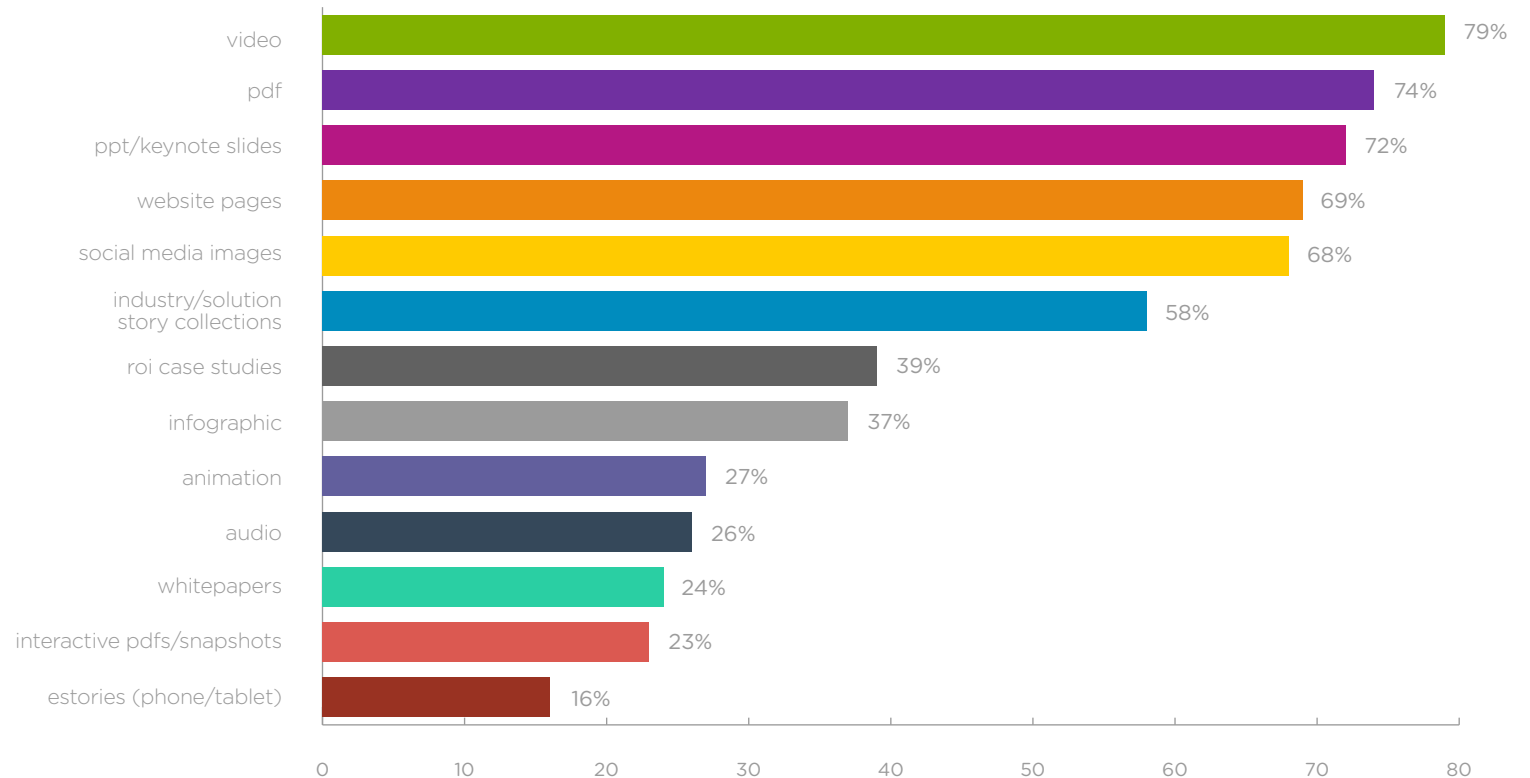
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video shines, but the real story is BoM shaped

q17: in which formats do you create customer stories?

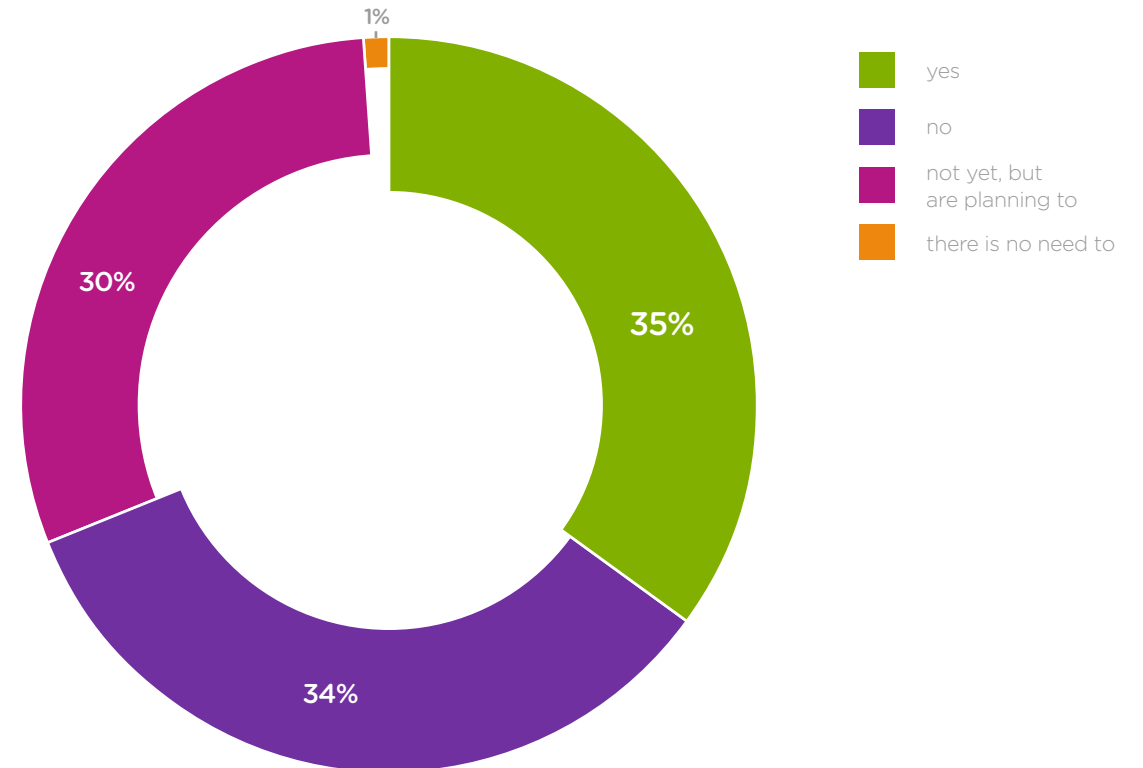
- After retaking the lead in 2019, video remains the most popular format in which to create customer stories
- That's far from the whole picture; with business travel being impossible, the last 15 months has seen a few more things of note:
 - a renaissance in the written word; more written stories than ever
 - bill-of-materials (BoMs) of different shapes and sizes are now the norm for customer stories. As few as 2 items, perhaps as many as 11 per story
 - the online accessibility/visibility of content is more important than before; print design is less prioritized
 - animation, on the list for the first time at 27%, is also regularly incorporated into video



inaccessible content (read this? not everyone is able to)

q18: are you thinking about the accessibility of your stories?

- The most disappointing of the responses to our survey; 34% of responders are not even planning to consider accessibility of the stories they create. We'll gloss over the 1% that said there is no need for accessibility...
- More positively, 65% of responders are either actively considering content accessibility, or already practicing it. Excellent progress! Let's get the number even higher for the next survey
- Techniques being utilized:
 - Video edit pace enabling audio description
 - Lowering the level of background music
 - Subtitle files that allow the viewer to adjust font size
 - Slower edits, less flashing lights
 - Using alt tags on all images
 - Using a descriptive title for links
 - Ensuring content can be navigated using a keyboard





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fulfilment

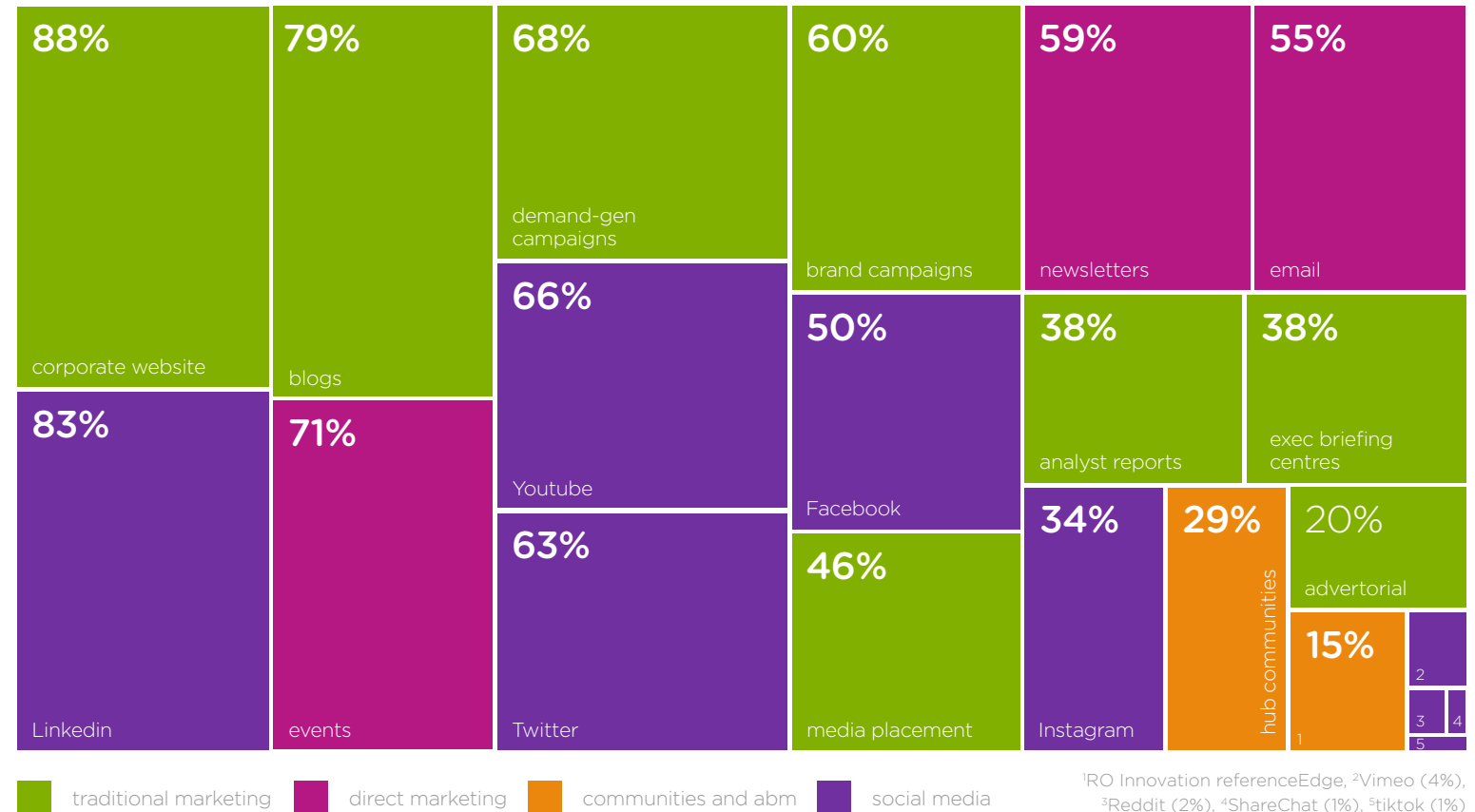
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letting the stories fly!

q19: which marketing channels do you use to promote/amplify your customer stories?

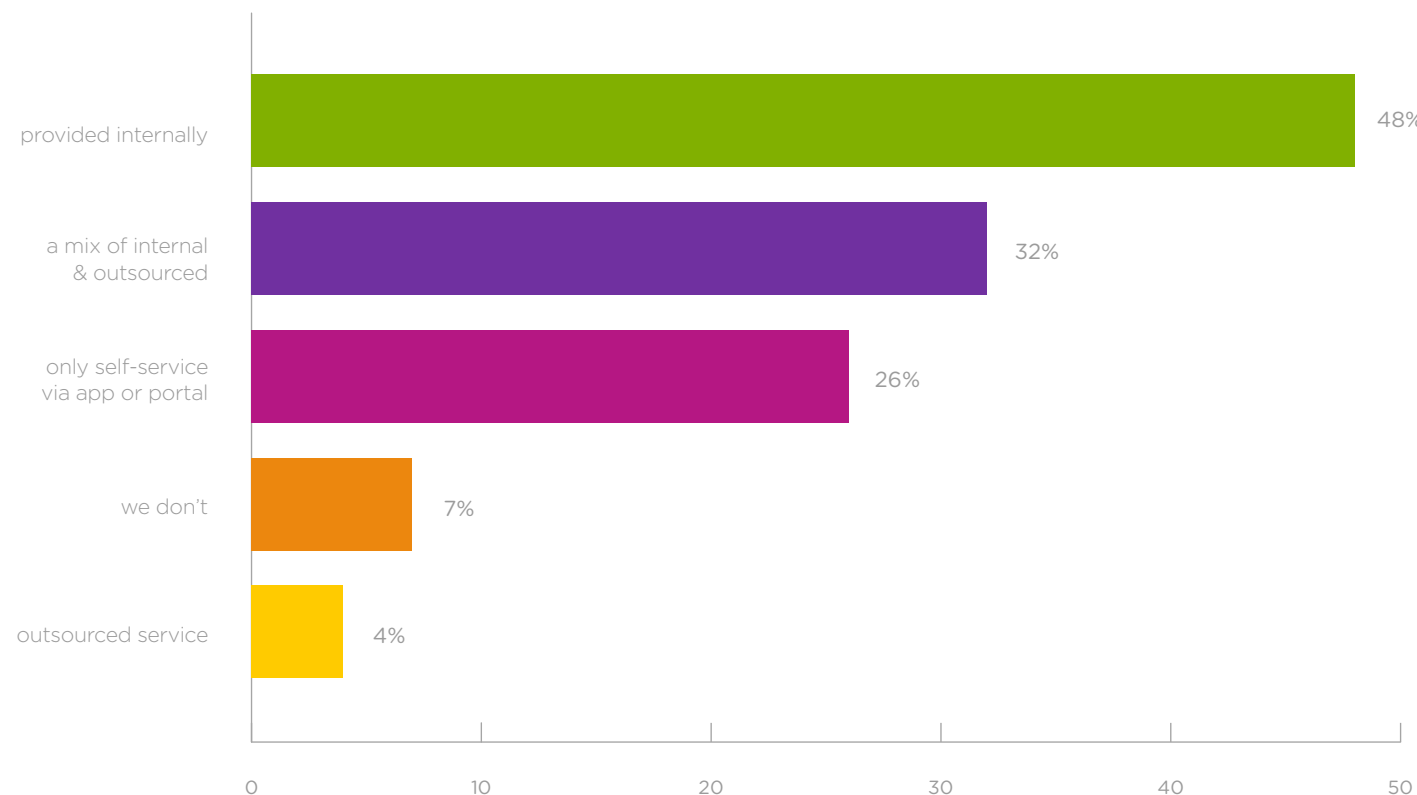
- The days of creating a 2pg/4pg PDF story and placing it in the depths of a corporate website are history
- On average, responders are using 9 channels to amplify their stories; thus the growth of story BoMs
- The big stand-out in this year's survey is the growth in the use of blogs; it's now the third-rated channel with a score of 79%
- 88% of responders still cite the corporate website as important; LinkedIn is in second place at 83%, events at 71%. Also demand-gen campaigns at 68% and brand campaigns (60%) feature strongly
- YouTube (66%) is the strongest of the remainder of social media, then Twitter (63%). It's not a major surprise platforms seen as more 'consumer' did not fare well



advocacy on a plate

q20: how does your program provide references to sales & marketing teams?

- In addition to comms amplification, 93% of responders also wish to get advocates and their stories into the hands of sales and marketing
- 26% of these use a self-service model, often a story repository but also request processes in specialist platforms or home-grown tools
- The majority of provision of advocacy/stories to sales and marketing happens internally; also 36% of responders outsource or use a hybrid internal/agency model





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measurement

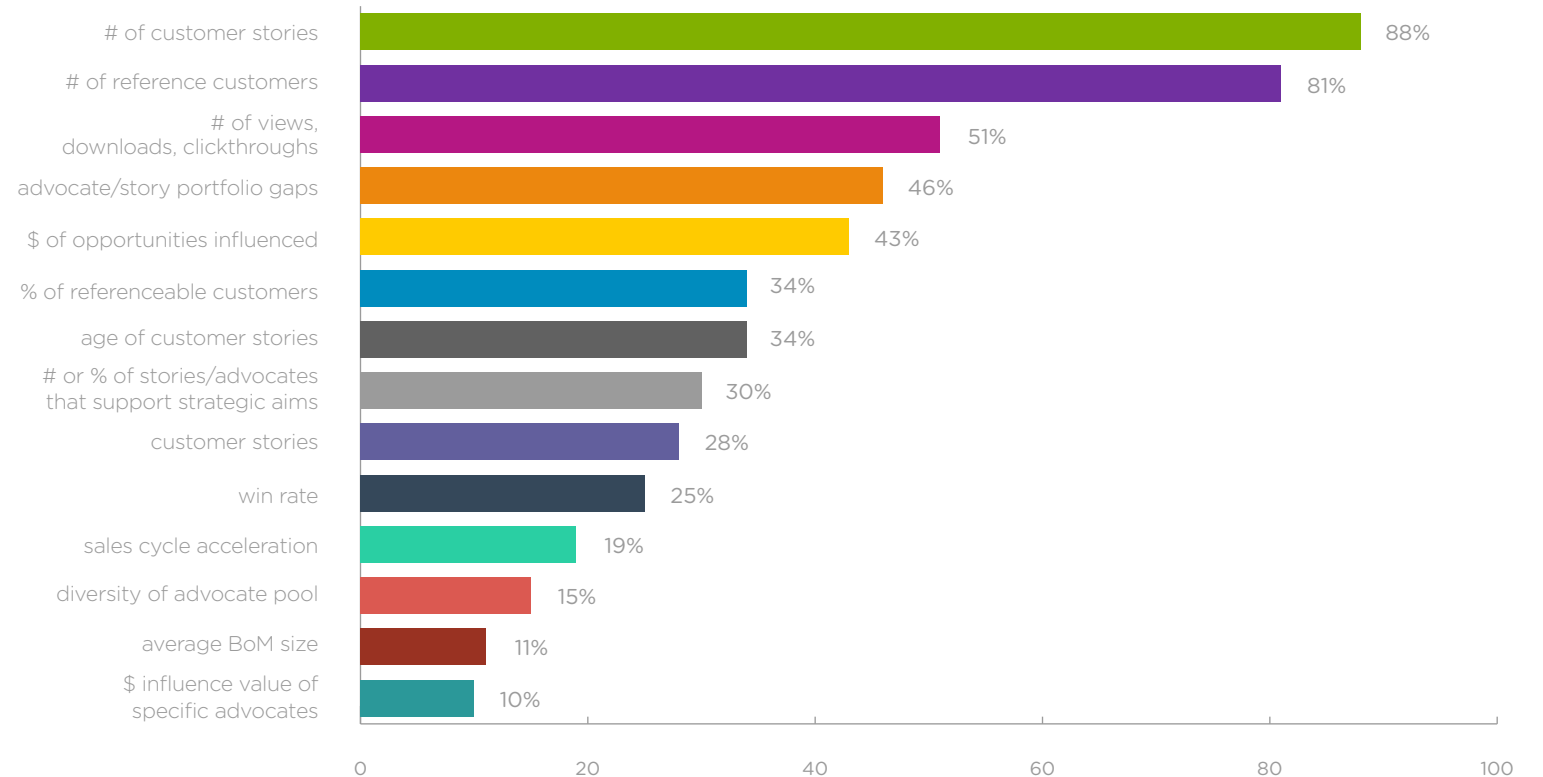
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to manage, first measure

q21: which of the following does your program measure?

- Being a customer advocacy manager is both a blessing and a curse. A curse because everyone has an opinion on your stories and how they would do things differently, but a blessing because a) people care about what we do, and b) we are in then enviable position of being able to tie our work directly to specific deals; measuring program and individual advocate influence value
- Re: measurement, start anywhere. The easiest to measure is 'numbers of things' and this is shown clearly by survey responders; the three most popular measurements are volume based
- Diversity of the program's advocate pool is only noted by 15% of responders, but it's now on the board and set to increase. We know people trust 'people like me' the most, so surely we need advocates, and advocate marketers that represent the wider community
- Great to see value metrics and sales effectiveness holding steady compared to previous years





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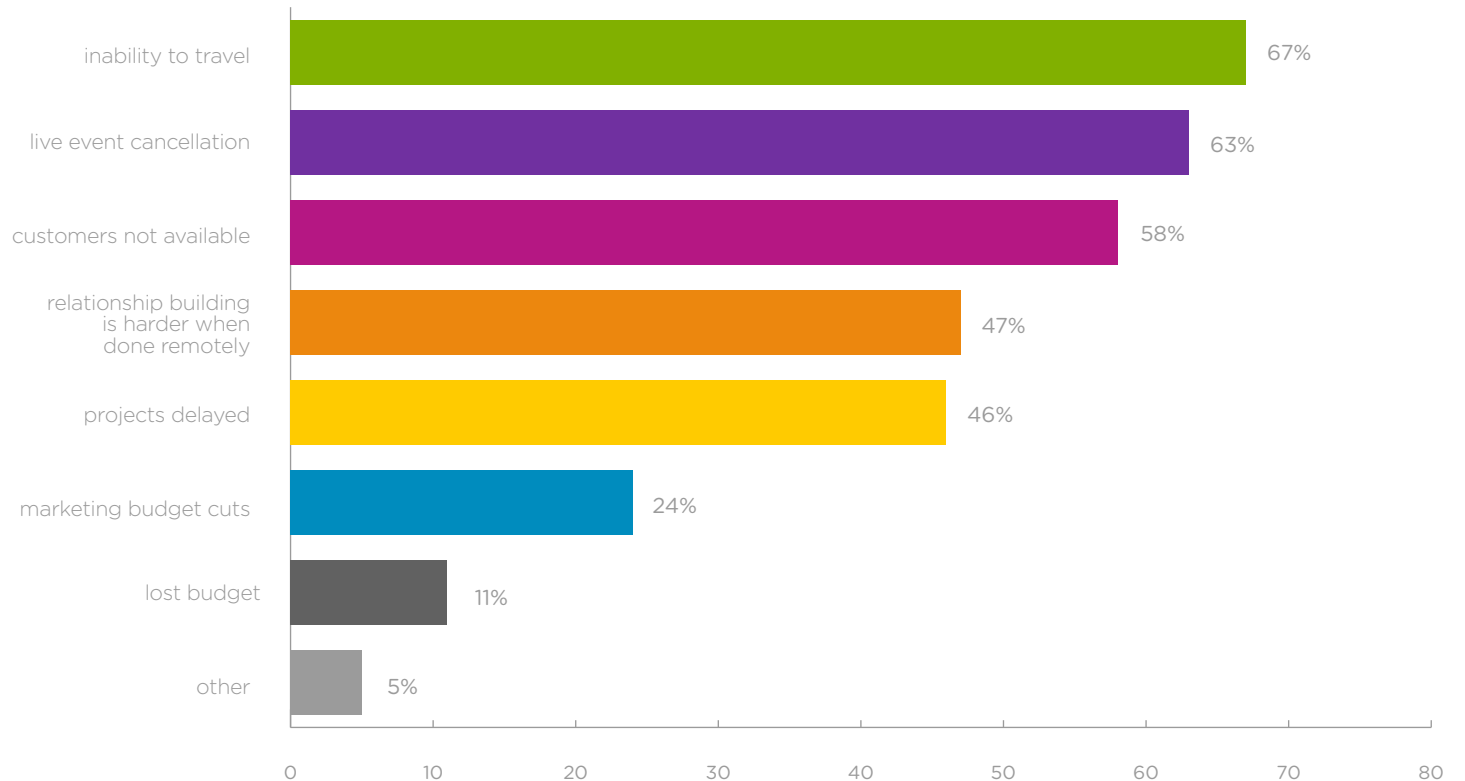
and yet with our hands tied behind our backs....



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q22: besides the human cost, which of the following are the largest negative covid impacts to programs?

- In retrospect, perhaps this question could have comprised slightly different answers, or perhaps not be asked at all. We had a full complement of responses so have included them
- The chart speaks for itself. From a professional perspective it has been face-to-face interaction that has been missed the most, followed by the impact of live event cancellation, project delays/being shelved, and the associated budget impact



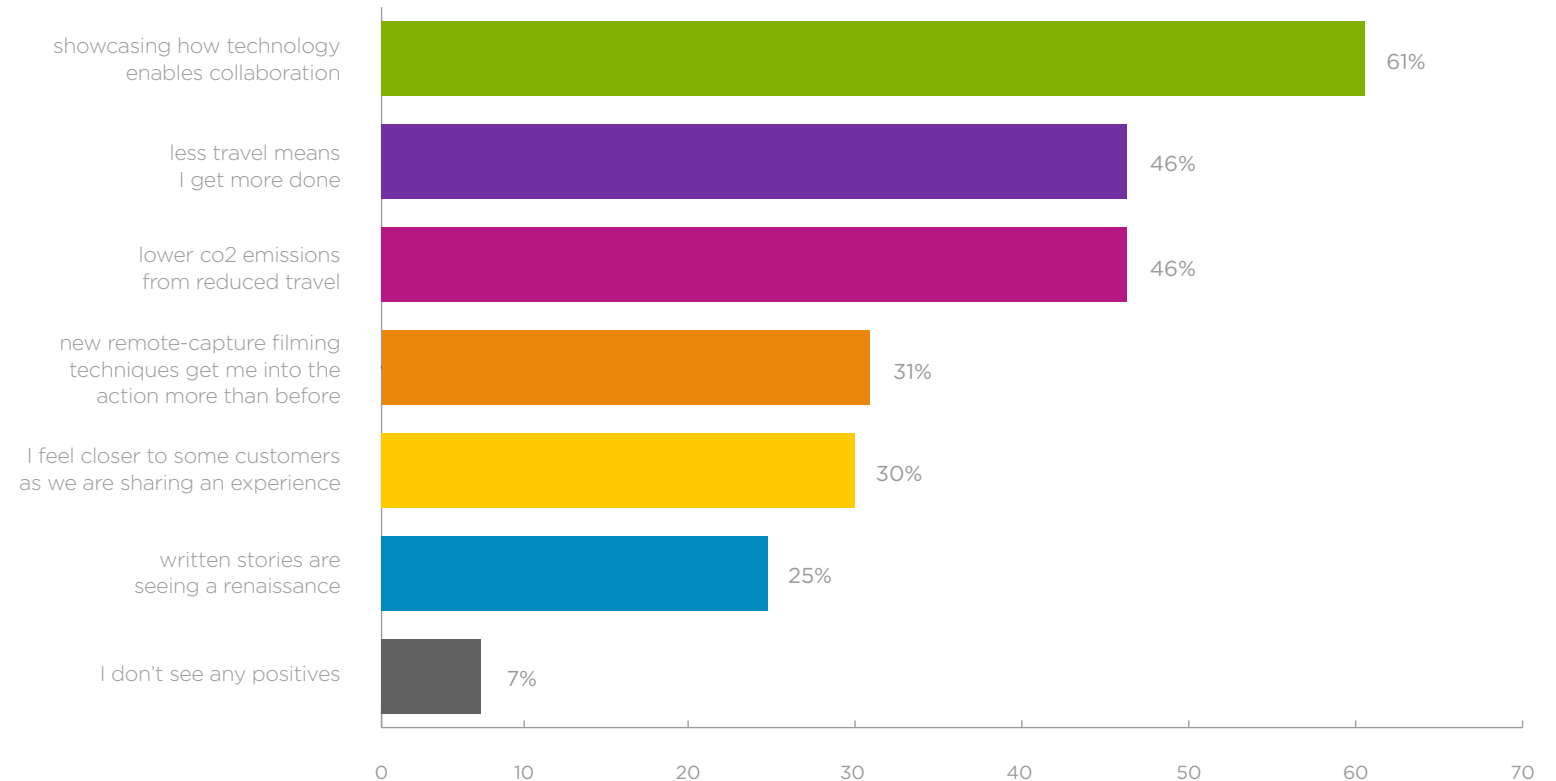
we have managed to pull many rabbits out of hats!



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q23: which of the following do you view as the positive impacts of covid on customer advocacy programs?

- Tech has proved its worth in a move to home offices; cloud-based tools and collaboration have been essential. For some organizations it was painful, for some a simple switch, but all agree that years of change to hybrid working happened in a few short weeks
- As hard as it is to see positives, we can all agree things will not go back to their pre-covid state. The planet has breathed a little, we have mostly got a little fatter and we're stretching the capabilities of collaboration tools to be there without being there





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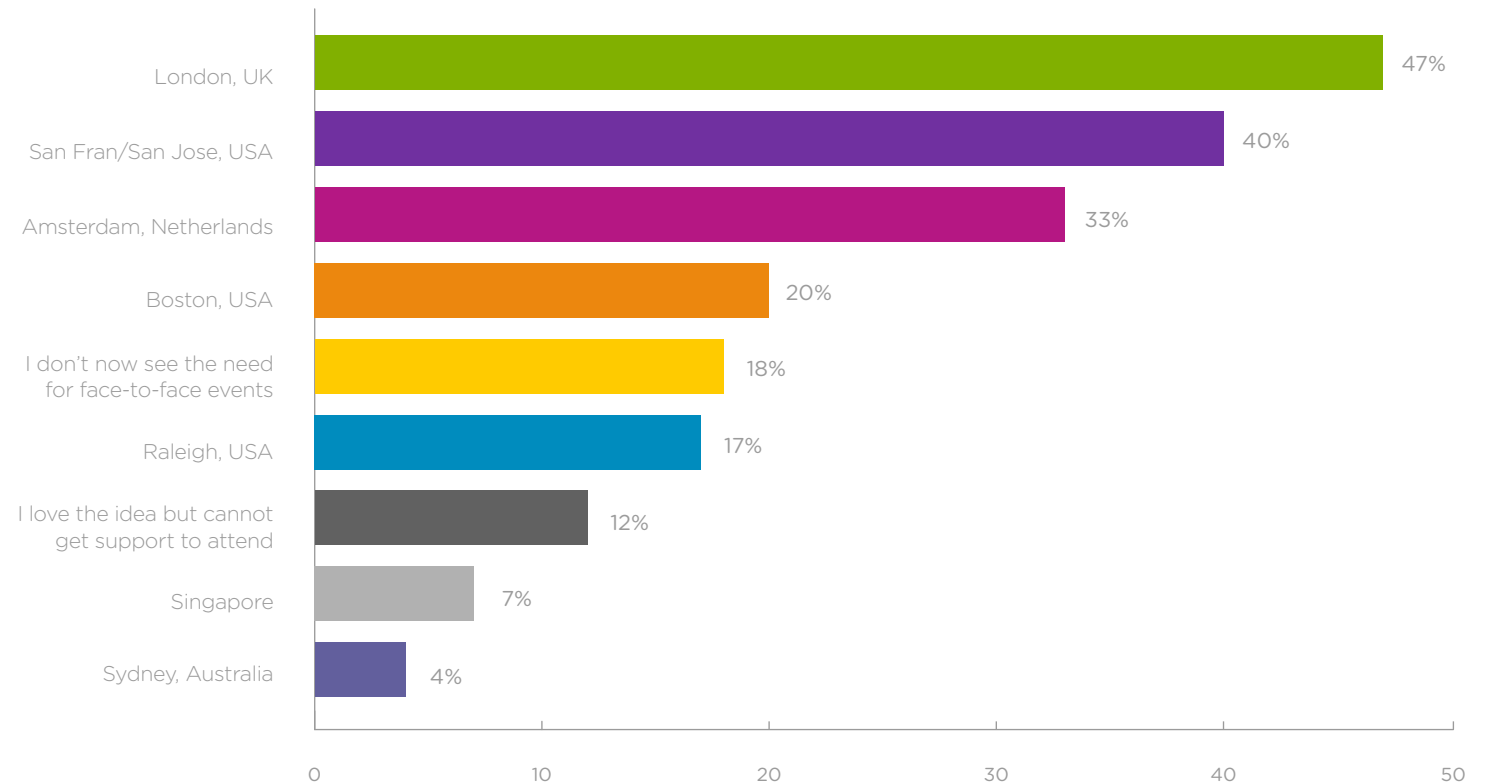
pioneer. challenger. specialist.



thames valley, river valley, silicon valley

q24: which of the following would be your top two location preferences for the next AMA event?

- Not a week goes by without questions about the dates and locations of the next Advocate Marketing Academy (AMA) events. It's fluid; what we're certain of is the next events will be face-to-face, when the time is right
- As for location it seems clear the London area is preferred for EMEA, San Jose or San Francisco for the US, and Singapore for APJ. We have venues in mind and will announce our next event as soon as we are able to
- EMEA and the US seem set to be our usual theatre-style one or two-day events, and Singapore is likely to be a half-day
- More as soon as we're confirmed! Speaker volunteers and ideas are most welcome
- Check out previous AMAs [HERE](#)



elbows? nah, let's hug!

q25: when would be the earliest time you might feel comfortable about attending a face-to-face event?

- This question was asked a couple of months ago so we're not sure how it stands up. What's clear is that it's unclear! even the most popular response was only selected by 21% of responders
- We'll keep monitoring government guidance and community sentiment; any further feedback/insights will be gratefully received

Jun 21	July 21	Aug 21	21% Sept 21
Oct 21	Nov 21	1% Dec 21	Jan 22
Feb 22	Mar 22	Apr 22	May 22
Jun 22	July 22	Aug 22	Dec 22

next 12 months

q26: which of the following are your top four program focus areas for the next year?

Overall, content enhancement scores the highest, followed by program construction, connections, then community activities.

Content

- Creating customer story BoMs: same story different formats (41%)
- Creating more visual content: animation, infographics, video etc (36%)
- Perspectives storytelling: same story different angles (32%)

Construction

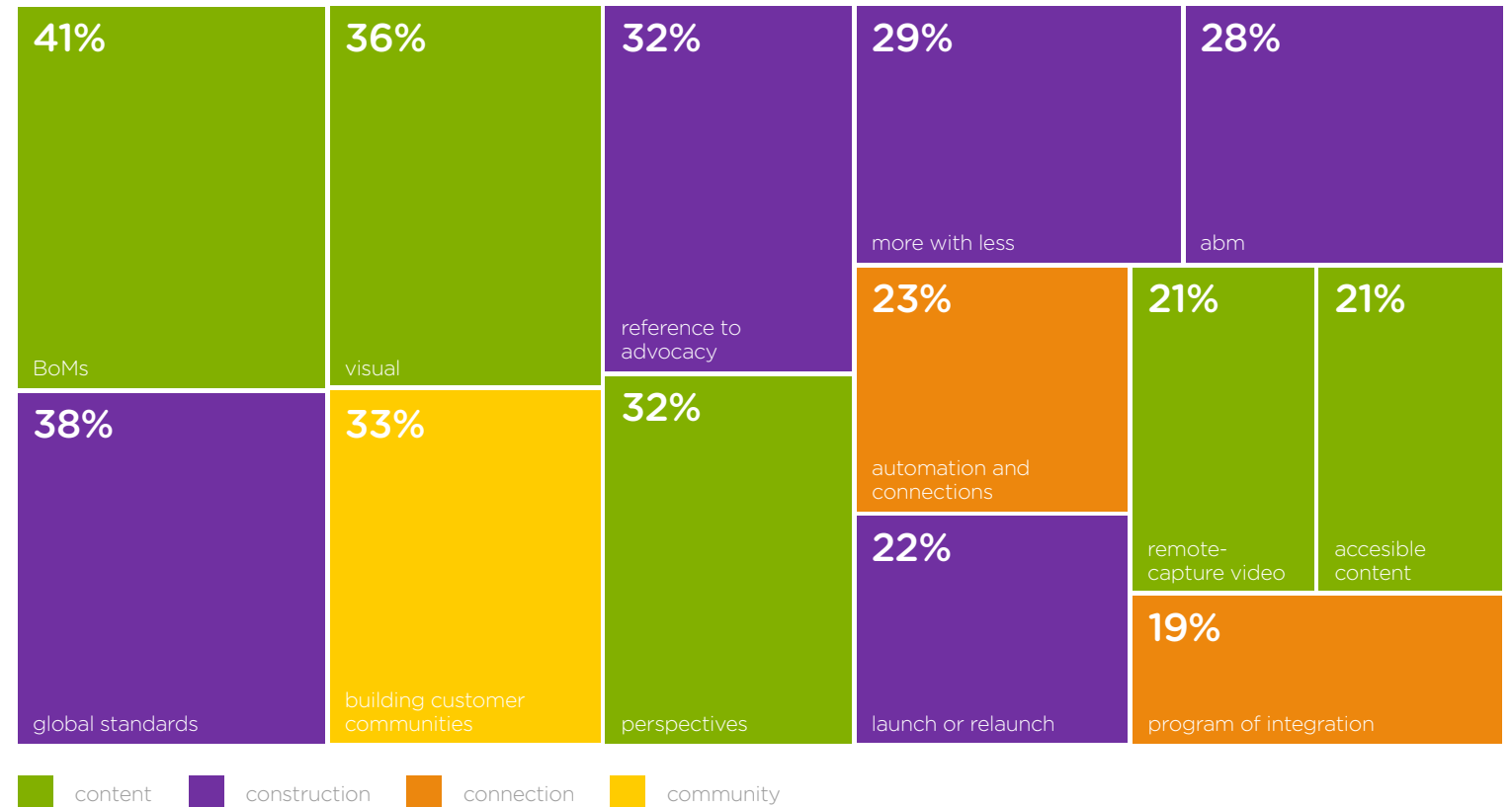
- Implementing global standards: for stories, processes (38%)
- Moving programs from reference to advocacy (32%)

Connection

- Automation and connections between systems (23%)
- Integration of disparate programs (19%)

Community

- Building or maintaining customer communities: hubs, user groups, executive programs (33%)



about us



inEvidence

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

inEvidence supports its clients with all things customer-advocacy-shaped; from the creation of a few customer stories to creating multi-language full production videos, running a fully-outsourced complex global program, and everything in-between. We're pleased and proud to be able to power this regular global customer reference/advocacy industry survey.

Advocate Marketing Academy

Around 15 years ago we realised EMEA customer references/advocacy pros, or marketers that use customer stories as part of their mix had no formal career path and nowhere to meet, share and learn.

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



find out more

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