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2022 advocate marketing global survey

the state of the customer reference/advocacy profession

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welcome



contents

- 5 scope
- 13 integration
- 16 resources
- 24 recruiting advocates
- 28 customer stories
- 30 fulfillment
- 33 measurement
- 35 diversity
- 40 the future

the 2022 edition

What a change from last year.

We had the pleasure of presenting selected preliminary findings of this survey at Advocate Marketing Academy USA, a live, face-to-face, handshake-and-high-five event! It was incredibly good to meet some new faces and greet familiar ones...

We've kept our promise to continue to look at diversity in advocate marketing and the tech solution stacks being used.

It's all here, and if you'd like to see any other deep dive please contact us. Enjoy!

about the survey

The 2022 advocate marketing global survey continues our quest to better understand the current state of the advocate marketing profession, specifically customer reference and advocacy programs.

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

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

methodology

This 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 369 times; responses were then checked to ensure they were complete and valid from people working in the industry. This resulted in more than 200 usable, verified responses, of which 164 were complete.

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

three things you need to know



1. growth is accelerating

2022 is the year of growth, and customer advocacy programs continue to be a focused marketing discipline.

91% of responders state their organizations view their programs as more important than in 2020, and demand for advocacy has never been more intense.

It's the same story for advocate marketing talent; program growth is made tangible with more than 100 specialist roles advertised so far this year.

All this growth brings its own challenges, yet budget does not seem to be the biggest impediment; only 9% of 2022 budgets are reducing, and 43% increasing yet again after an overall increase in 2021.

The industry is buoyant and with more events and opportunities, there has never been a more exciting time for advocate marketers.



2. programs are integrating

All this growth and focus is driving more formal interlock across customer programs.

Connection & alignment is the second-hottest topic of 2022.

Technical integrations are playing their part in helping programs to scale, and creating a more-complete picture of the customer, while organizational alignment is making connections that directly benefit advocates.

Whether it's user groups and other communities, reference or advocacy programs, exec sponsorship, ABM or customer advisory boards, it's great to see so many organizations looking at their customer advocate relationships from the outside in, often creating an overarching, meaningful value proposition.



3. diversity apathy continues

We've delved a little deeper into advocate marketing diversity and inclusion; it does not make for encouraging reading.

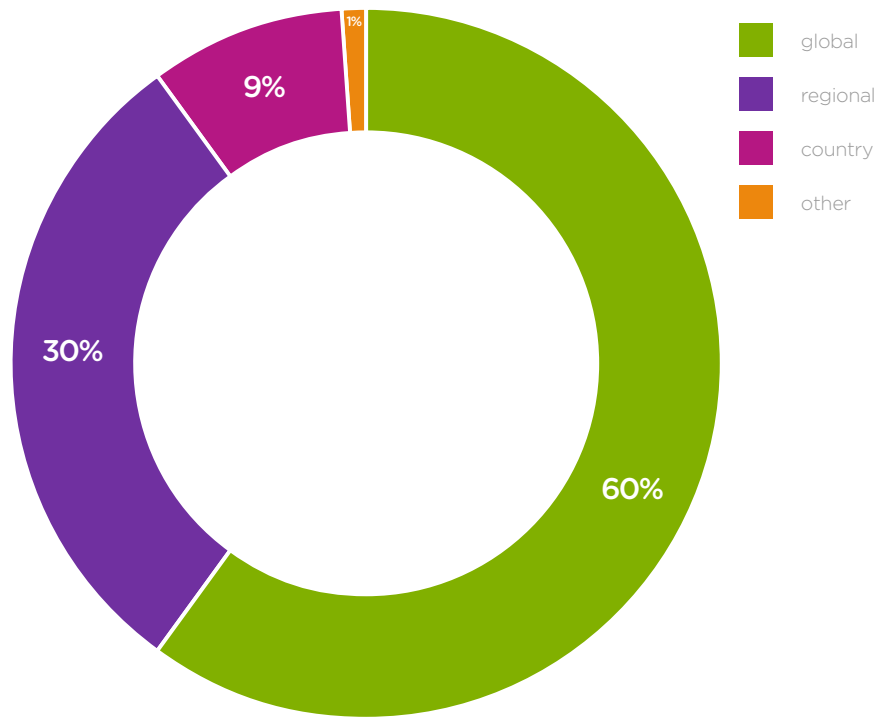
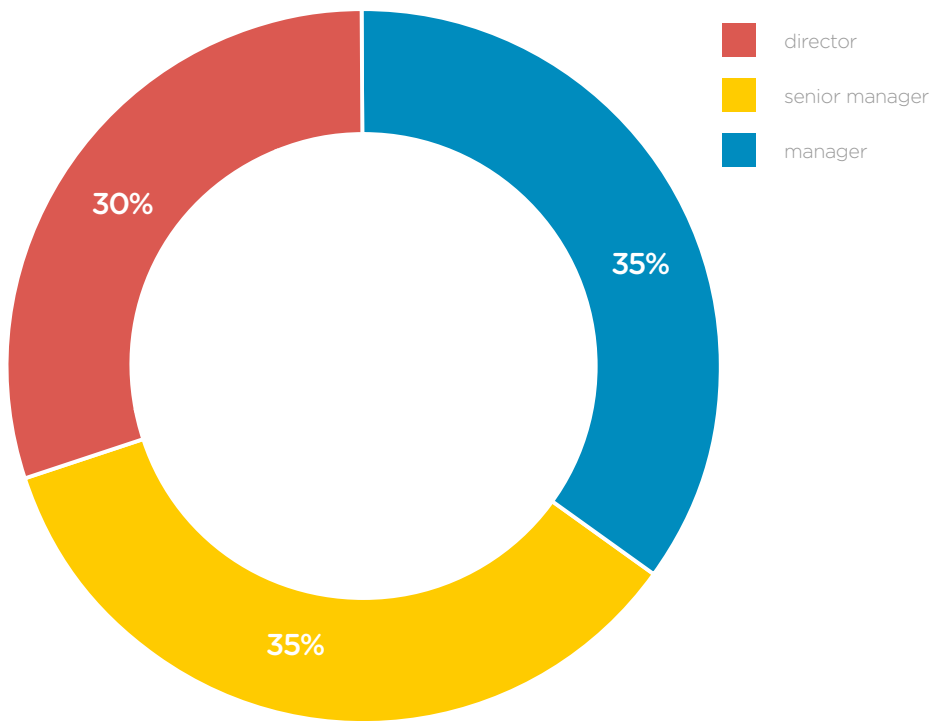
Only 1% of responders strongly agree there is a lack of diversity amongst advocate marketing pros; meanwhile, a mere 5% strongly agree that we feature sufficiently diverse representation in our stories.

Added to this, only 16% of programs measure the diversity of their advocate pools, and over a quarter of responders are not considering the accessibility of their content.

These results show (at best) a lack of awareness or (more troublingly) a large degree of apathy.

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 women in leadership roles leadership within our discipline - even stronger at the Director level than at Manager level
- 60% have a global remit, 30% regional and 9% country or specific industry



75 discrete programs, 55 brands, 4 regions

participating organizations include:

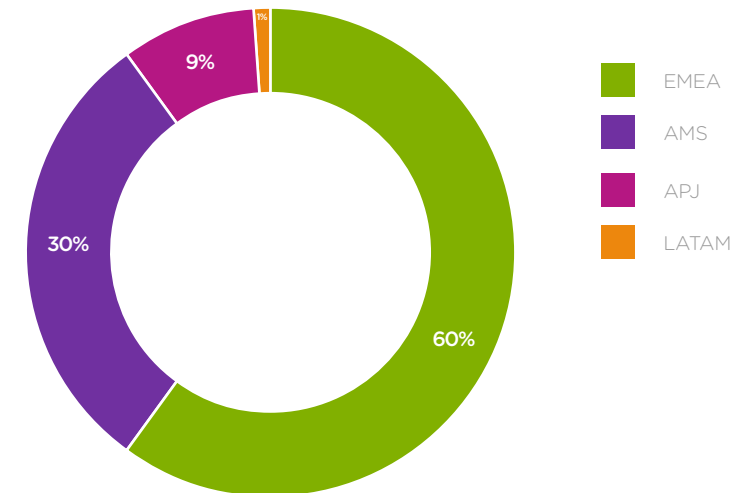
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| ■ Airtable | ■ Fujitsu | ■ Progress |
| ■ Appian | ■ Genesys | ■ Qlik |
| ■ Biz2Credit | ■ Google | ■ Red Hat |
| ■ Calabrio | ■ Hootsuite | ■ Salesforce |
| ■ Celigo | ■ HPE | ■ SAP |
| ■ Checkmarx | ■ iManage | ■ Sendoso |
| ■ Cisco | ■ Innovate UK | ■ ServiceNow |
| ■ Citrix | ■ Menlo Security | ■ ServiceTitan |
| ■ CloudBees | ■ Micro Focus | ■ Sherpa |
| ■ Cognism | ■ MongoDB | ■ Tradeshift |
| ■ Cohesity | ■ Nuance | ■ Veeam |
| ■ Commvault | ■ Openprise | ■ VMware |
| ■ Coupa | ■ OpenText | ■ WestRock |
| ■ Datel | ■ Oracle | ■ Workday |
| ■ F4 | ■ OutSystems | |

On behalf of the entire community please can we say

a massive thank you

to everyone who participated. With 164 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!





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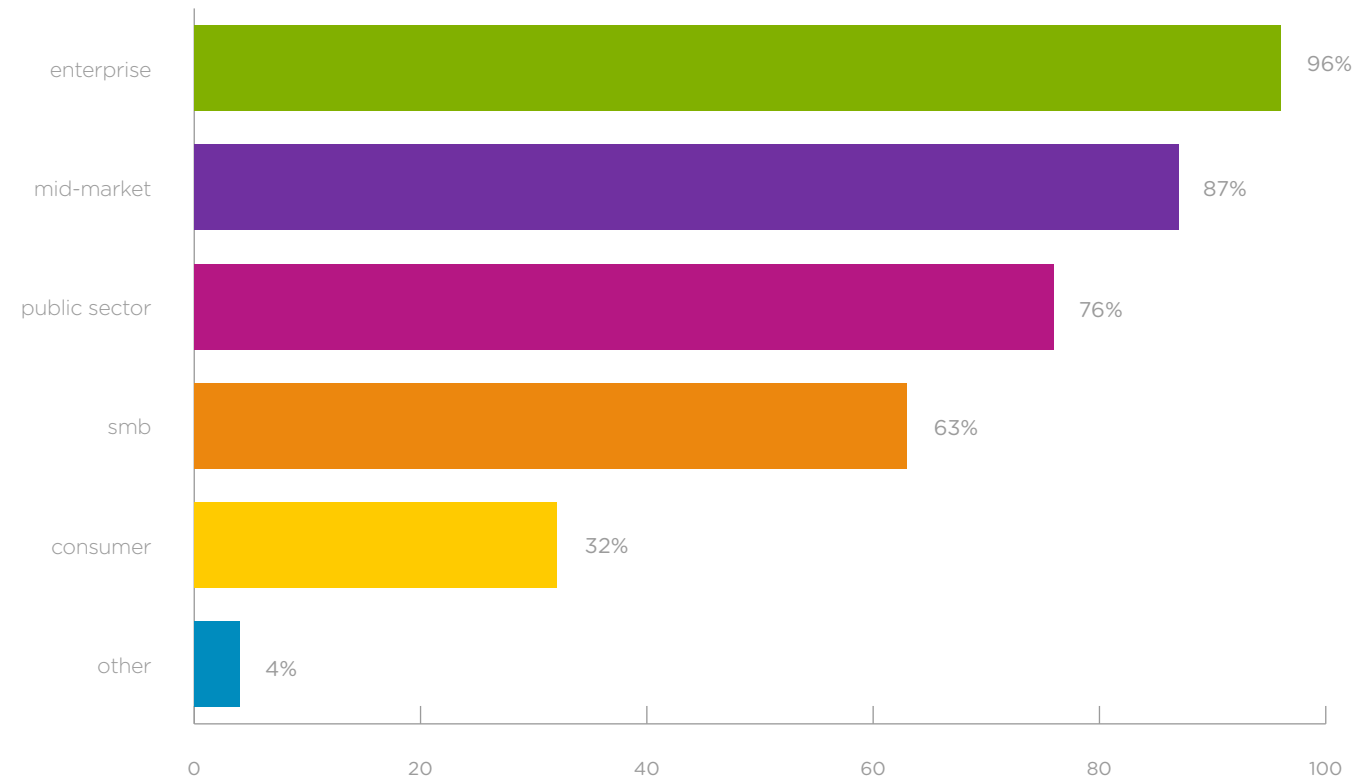
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segment scope surges

q: which customer segments do your program support?

- With continued increase in the number of segments supported by each program, it's clear advocate marketers are playing a larger role within their organizations
- The anticipated enterprise and public-sector bias is evident, while mid-market continues to increase at a historically faster rate than other segments (9% increase in 2022)
- 'Consumer' has had a surge this year, up from 20% in 2021 to 32% in 2022
- 'Other' includes an industry focus outside of the above

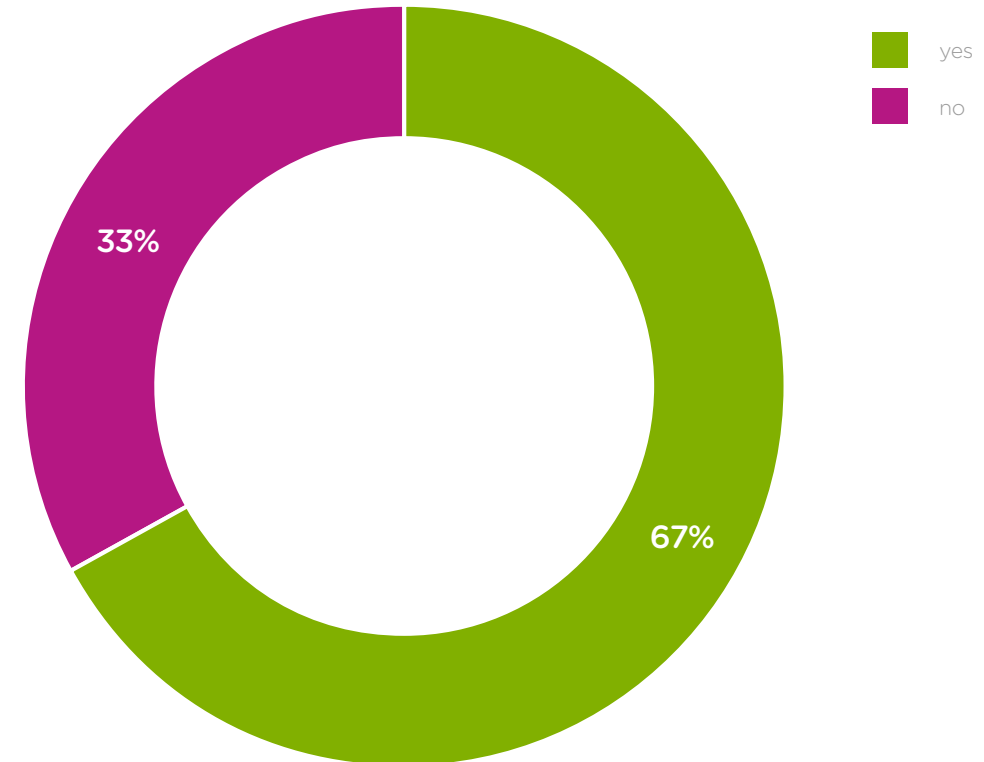




channel slightly losing focus

q: does your program support channel partners as well as direct accounts?

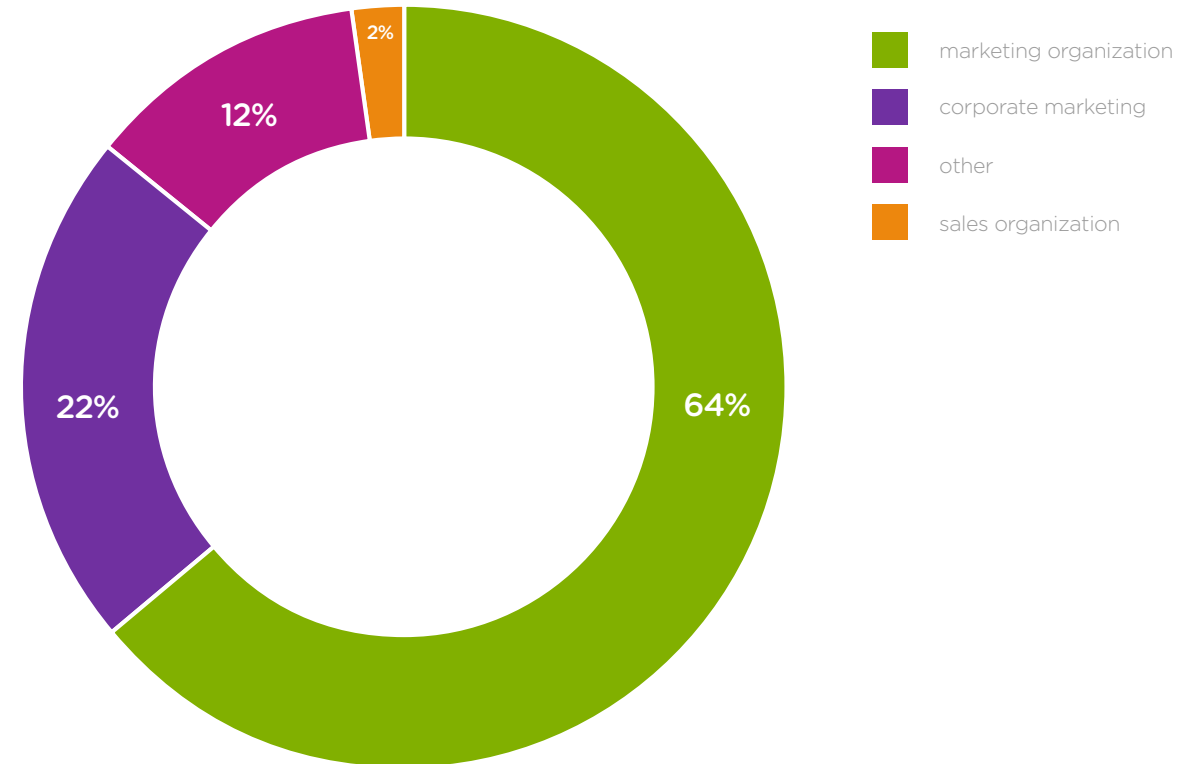
- The percentage of programs that support partners climbed to an all-time high in 2021 and has now reduced slightly
- Working with partners can be tricky for some programs, and is often time consuming, yet it often brings the realization that it's not 'all about you' and it's possible to create a story, or support a sales motion, that can benefit the customer, your organization, and a partner
- We are also seeing that programs that support partners are investing more effort in this area



marketing's got this

q: where does your program sit within your organization?

- 88% of programs still reside within one form of marketing department or another
- Programs sitting within the sales organization have halved this year, but at 2% this is no doubt due to having responses from a slightly different mix of organizations
- No other trends are to be gleaned from this chart; in reality the position of reference/advocacy programs within organizations remains virtually static
- The 'other' segment at 12% includes Product Marketing, the Communications team, and Ops

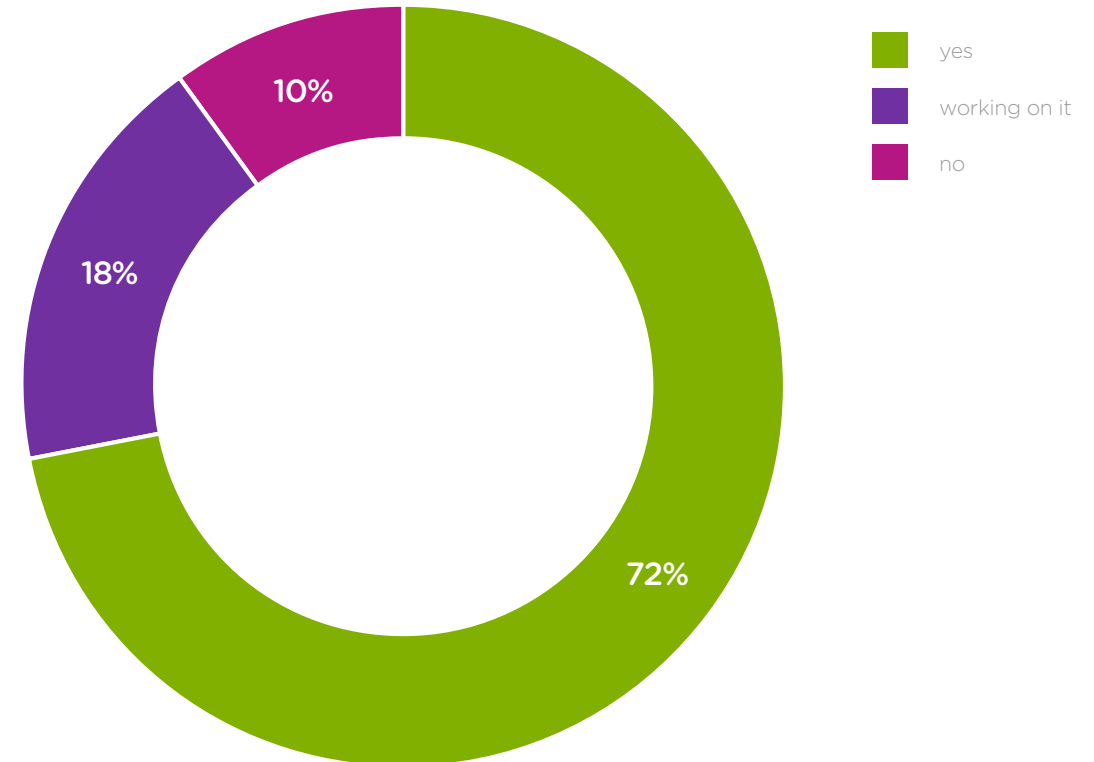




oi! 18%! please get a move on

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

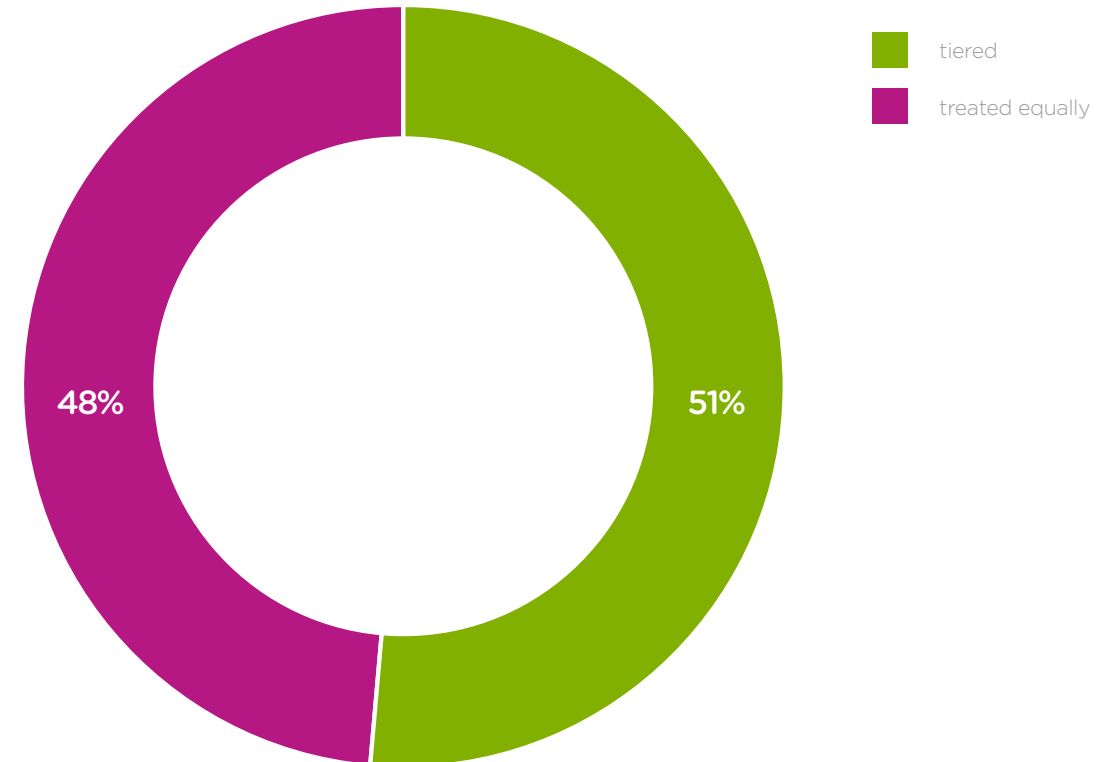
- At first we thought there might have been a mistake, or perhaps something was broken. But no! These results have been exactly the same in the last three surveys
- Please can the 18% of folks 'working on it' get a move on :)
- When one considers the amount of program alignment and integration invested, this result is even more surprising/ depressing
- We know advocates want to belong. Advocacy programs are often based on a SANE methodology (Status, Access, Networking & Education); surely a branded, external program is part of that strategy?



fewer tiers, more equality

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

- After hitting a high of 66% in 2019, the number of programs that tier customers is continuing to reduce
- We're hoping this is due to making an enhanced value proposition now available to all
- Tiering is still happening in approximately 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)
 - Mid: Advocate communities
 - Low end: Technical User Groups



logo power

q: by which criteria do you tier?



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- Brand is the standout winner in the free-text answers to this question, along with org size
- Products/solutions seem to be important, along with levels of engagement and subsequent recognition (but not points score)
- Tiering by strategic priority is a logical answer, also well represented here





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integration

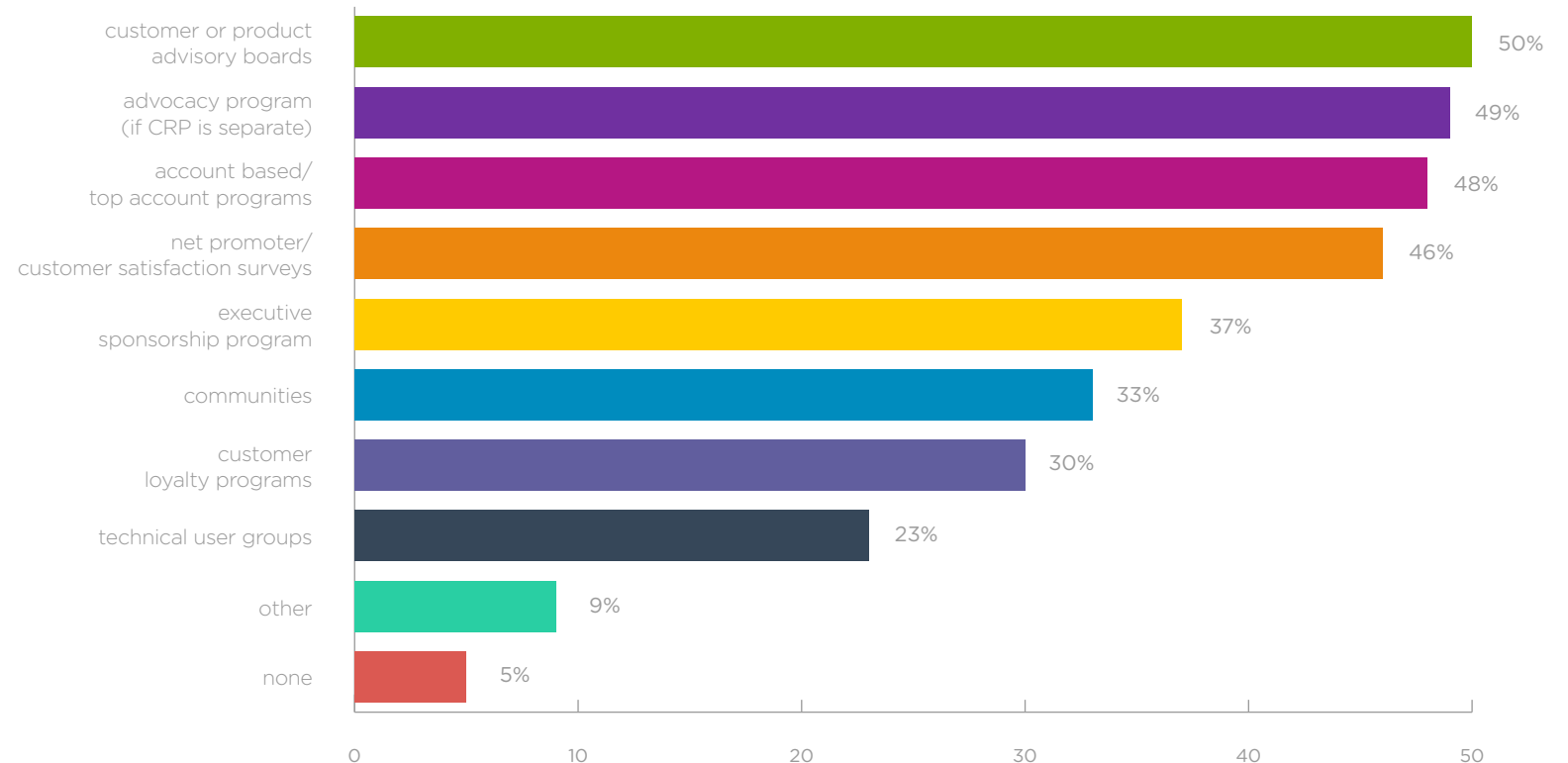
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connecting is cool

q: with which other programs does your program integrate?

- With only 5% of programs being truly standalone, and an overall increase in the number of connections between programs, program integration is a clear focus for 2022
- Otherwise, the percentages of the integration of different types of programs remain fairly static
- Though not covered in the survey, we are also seeing more technical integrations between some lower-level activities, such as third-party reviews, surveys etc., often used as nomination pipeline

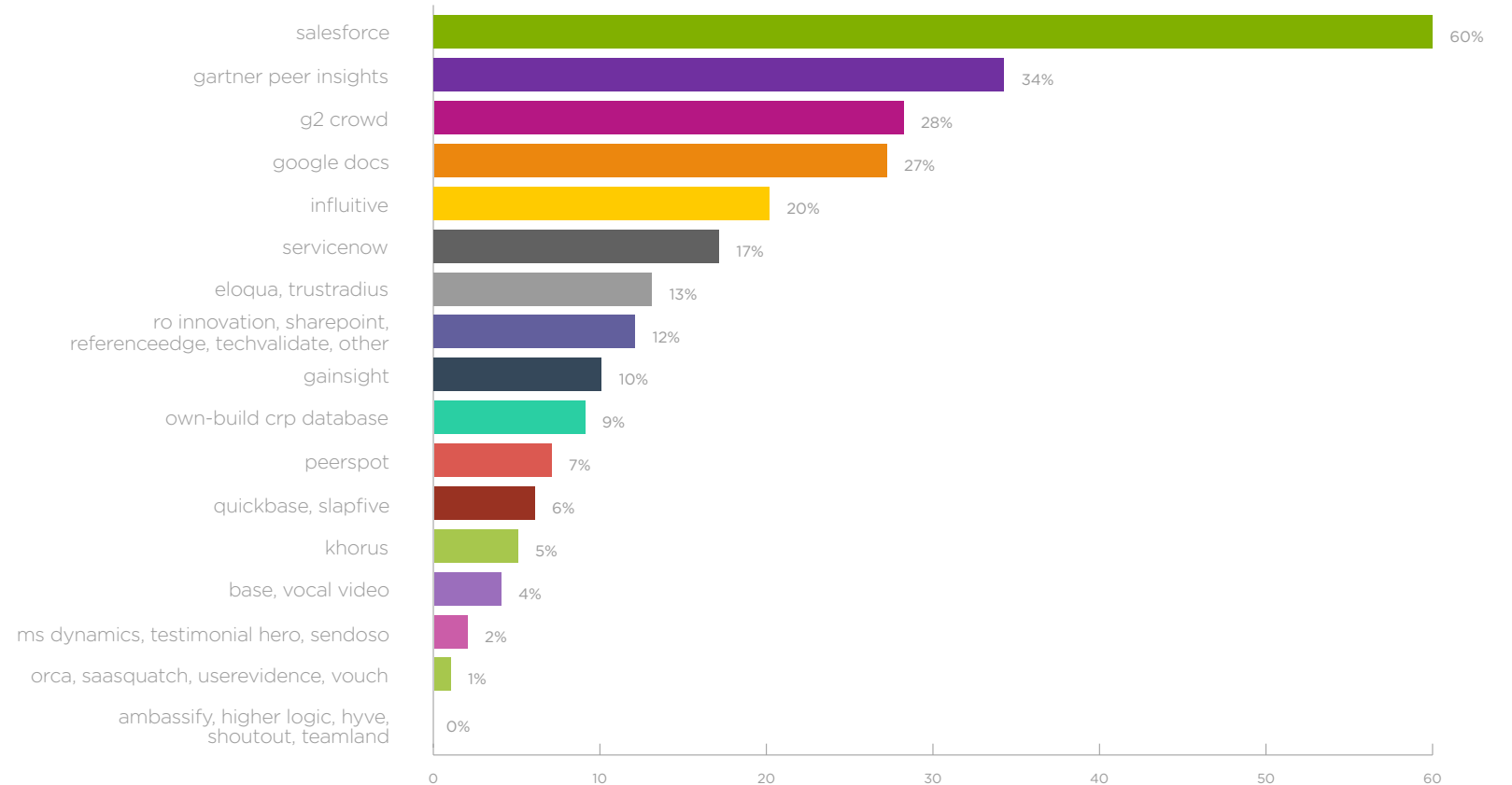




a bigger stack than an ihop

q: which of these martech apps does your program regularly utilize?

- This is the second edition of the survey to include the question: what can we glean?
- Organizations are still saying they are utilizing around four apps on average, with a slight increase
- Salesforce remains the most popular CRM and has increased its percentage from 40% to 60%
- Third-party sites have made a larger impact (G2, Gartner, TrustRadius etc.)
- ServiceNow has the largest growth by percentage
- The main program management tools continue to have a strong presence, while the online video tool app market is becoming crowded
- It's also clear that, despite all the tech out there, programs still rely on spreadsheets and word docs





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resources

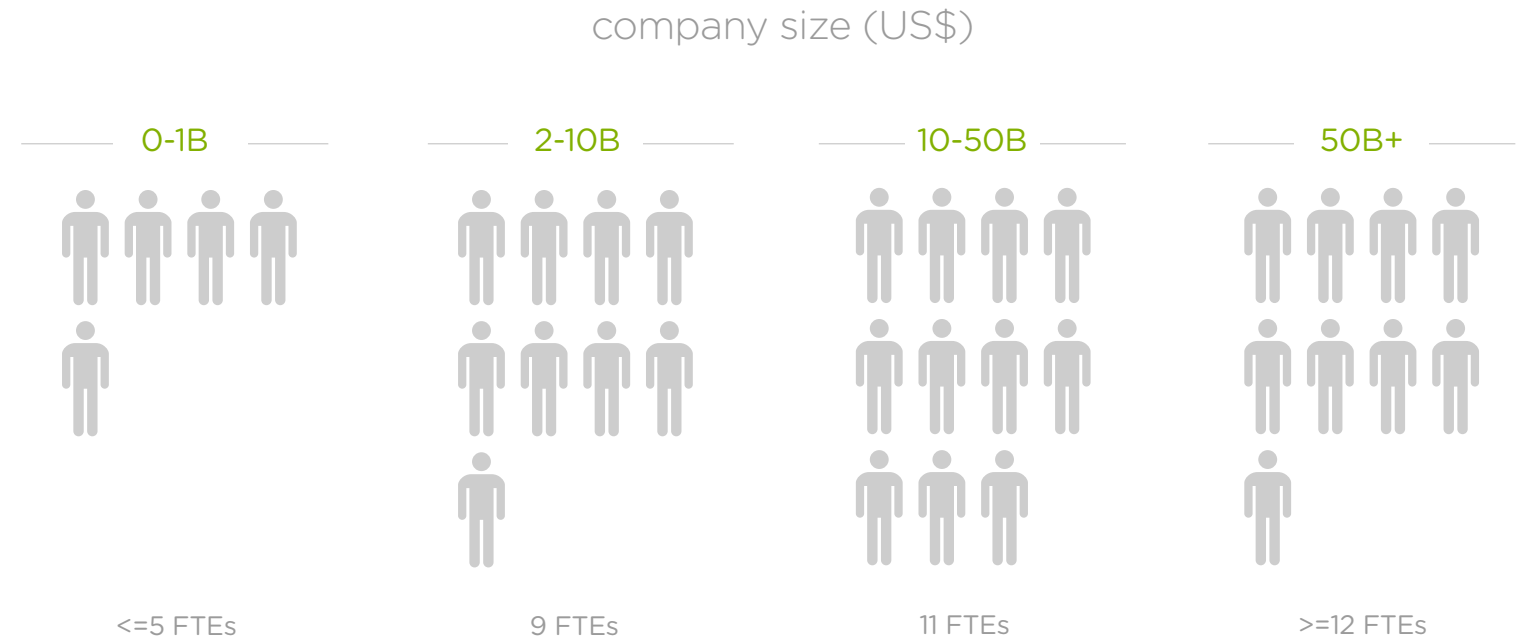
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staffing levels increase

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

- Though we are asked this question regularly, there is no easy correlation between organization size and program staffing levels, other than larger companies have more staff!
- As expected, with heightened focus on customer advocacy, the increasing budgets, and the sheer number of positions advertised this year, staffing levels have increased across the board
- 0-1B has increased from an average of 4 to 5 FTEs
- 2-10B has increased from an average of 6 to 9 FTEs
- 10-50B has increased from an average of 7 to 11 FTEs
- 50B+ has remained static, at first glance, at ≥ 12 FTEs, yet, while there are plenty of one-person programs, we're also aware of the occasional program with a team in excess of 30 FTEs. It's merely a guide
- When one overlays external agency resource, the FTE (full-time equivalent staff) differences between varying organization sizes will be even more marked



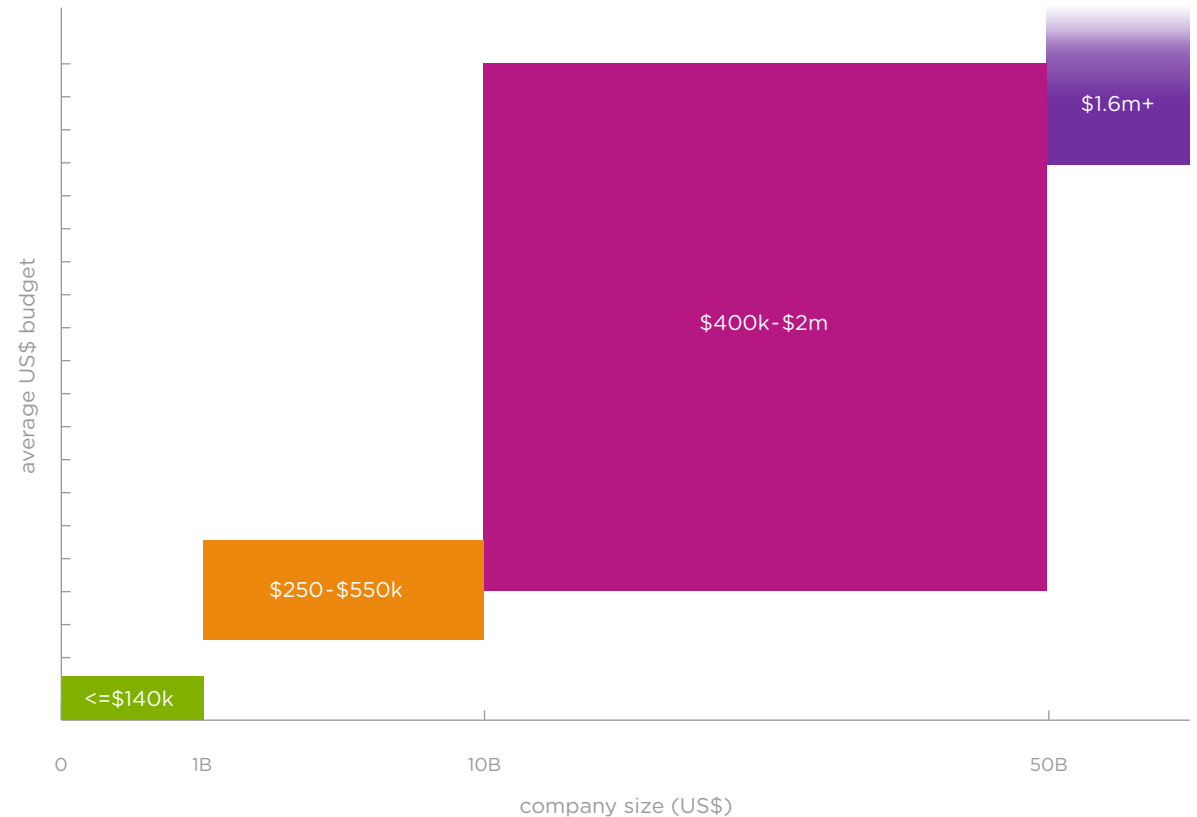
levels of investment

q: annual level of program investment, excluding people?

- The question we're asked most often, and, as we always must state, trying to meaningfully tie levels of program investment to a percentage of organization size is more 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
- Around three-quarters of programs answered this question (thank you!) and, while the bands are wide, there is certainly some level of correlation
- Even though budgets are up overall, many of these now in excess of \$1m, there are numerous programs for which \$100k represents a sizable investment



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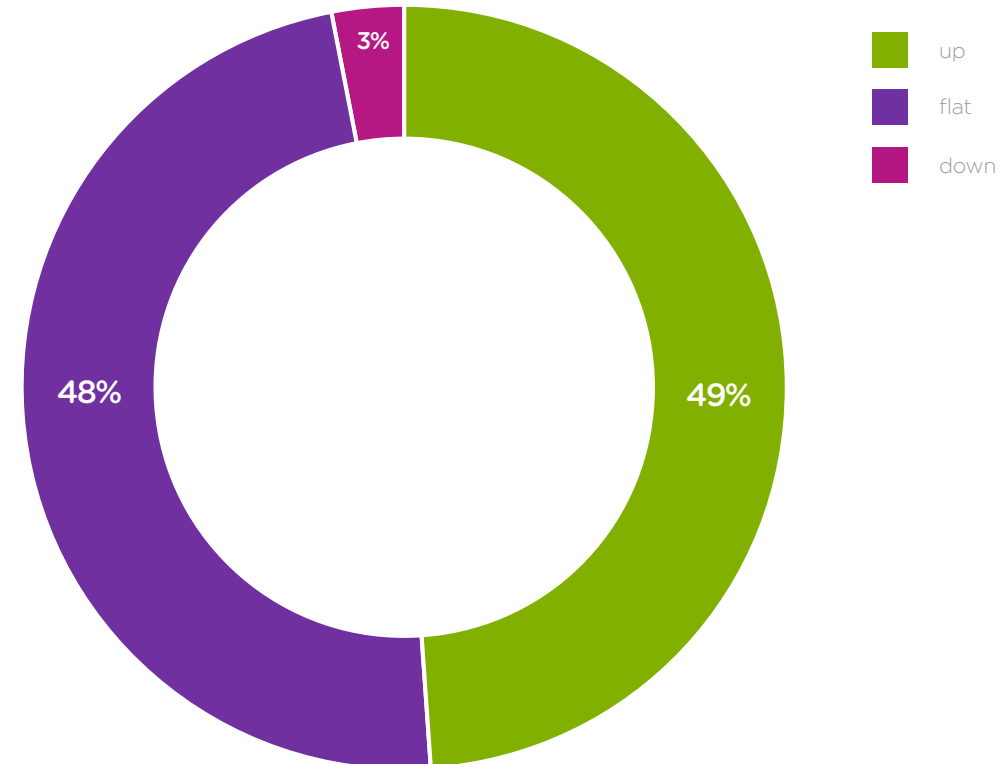




majority of budgets were up in 2021

q: compared to 2020, was your 2021 program budget up, flat or down?

- More budgets were up in 2021 than anticipated (49% actual vs. 35% anticipated)
- Fewer budgets were down in 2021 than anticipated (3% actual vs. 15% anticipated)
- 16% of budgets were down in 2020, so last year saw a tangible step forward in program investment
- It's worth noting these levels of increased and flat budgets occurred in a year that saw almost no face-to-face events, which can consume a sizable chunk of program budget
- We're always pleased to be able to talk about budgets because, alongside team size, it's the No.1 question the community asks us. Only 10% were not able to respond to this question

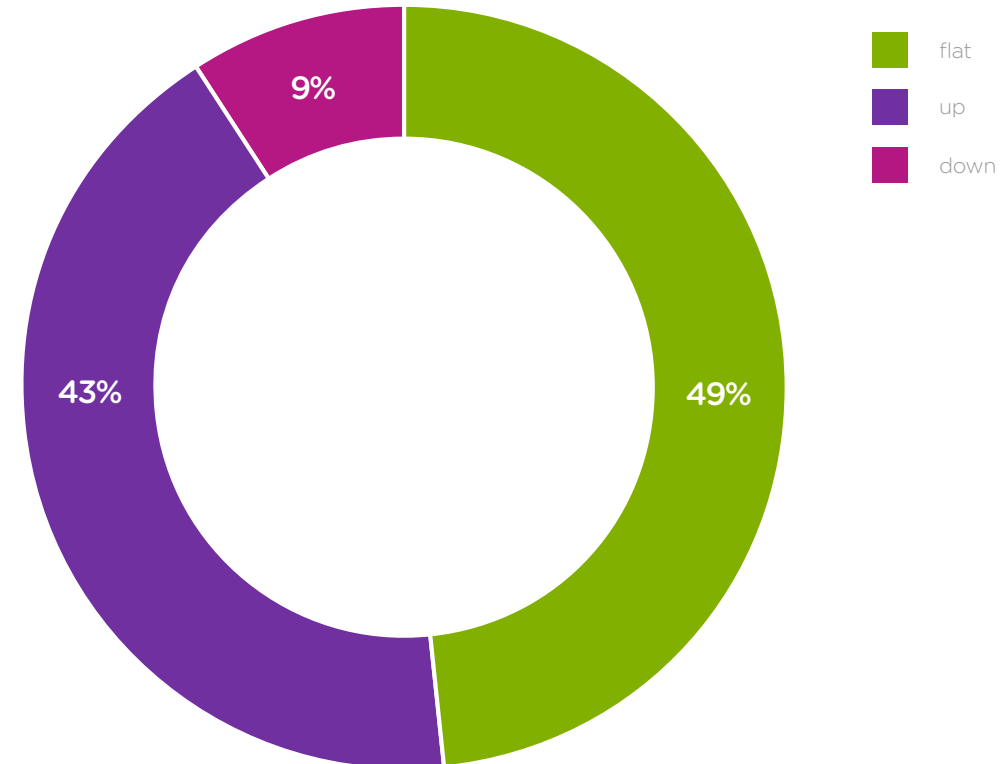




cautious growth in 2022

q: is your 2022 program budget up, flat or down?

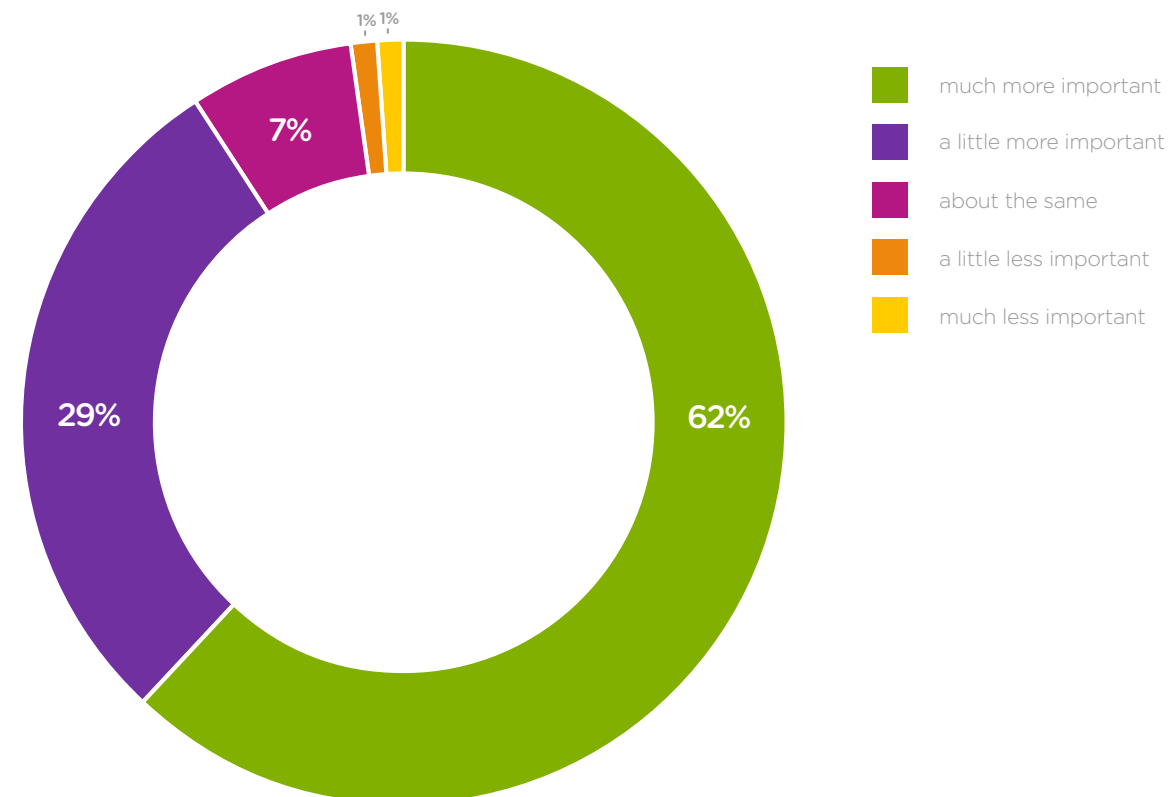
- With 43% of 2022 budgets set to increase, and 49% predicted to be flat, program finances seem to be in good shape
- Many programs are undertaking integration and reshaping projects so a proportion of this funding will be going towards strategic change, new comms, and program infrastructure
- While the percentage of budgets reporting as decreasing has trebled, this still only represents 9% of programs that responded
- In 2021 the percentage of programs that actually had reductions was one-fifth of the percentage anticipated
- We think program importance is increasing - let's see the reality in the answers to the next question...



you're in the right place

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

- In a new record for this survey, an amazing 91% of responders are saying their programs are perceived as more important now, than in 2020. Wow!
- Only 7% are seeing the same level of importance, while 2% of responders report their programs being perceived as less important
- These results align with the previous budget questions. It's not mere perception; overall, organizations continue to put their money where their mouths are
- It's clear to see why skilled talent is in shorter supply than ever and, based on both investment and sentiment over at least three editions of this survey, the results reconfirm advocate marketing as an excellent career choice

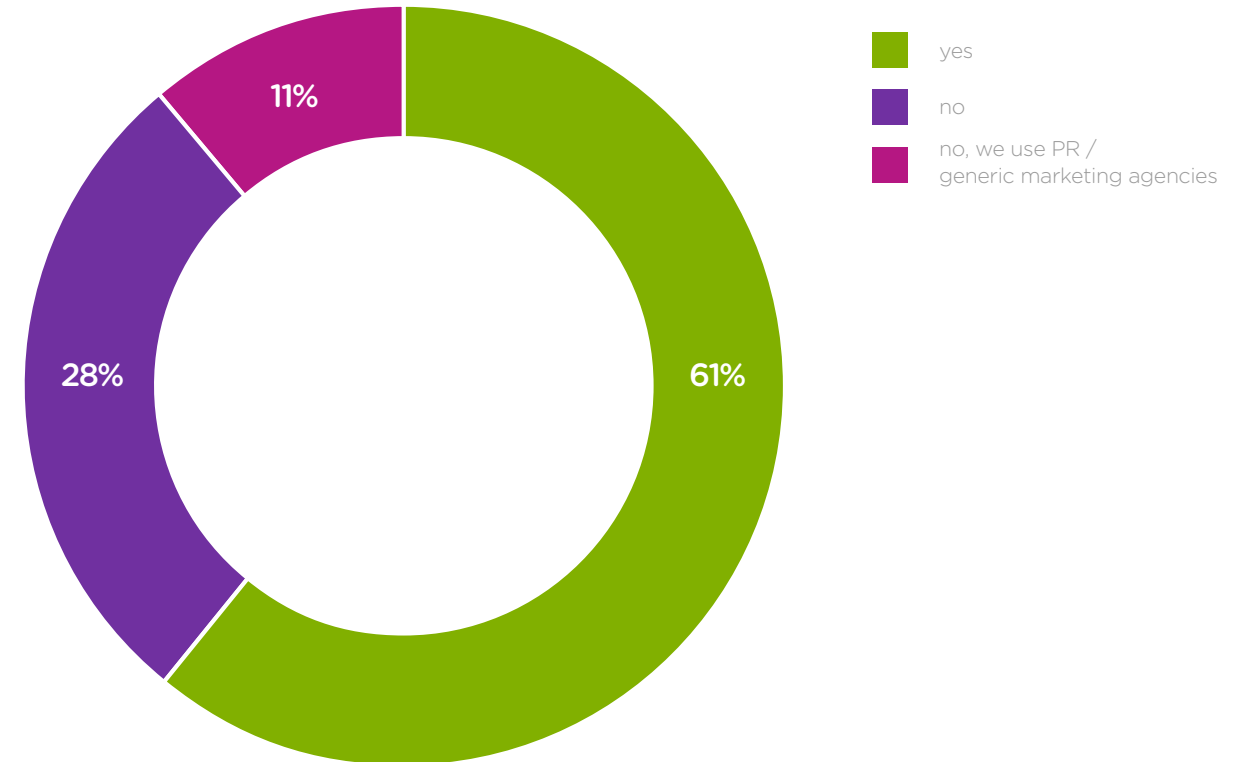




in-house teams growing

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

- Specialist agencies are still the choice compared to generalists, the percentage for which remains static
- The percentage of programs working with specialist agencies is down slightly yet ahead of 2019 levels. This seems to be due to:
 - a) a different mix of responders to this edition of the survey
 - b) client-side team sizes increasing
 - c) a shortage of experienced talent available to support the rate of growth/demand



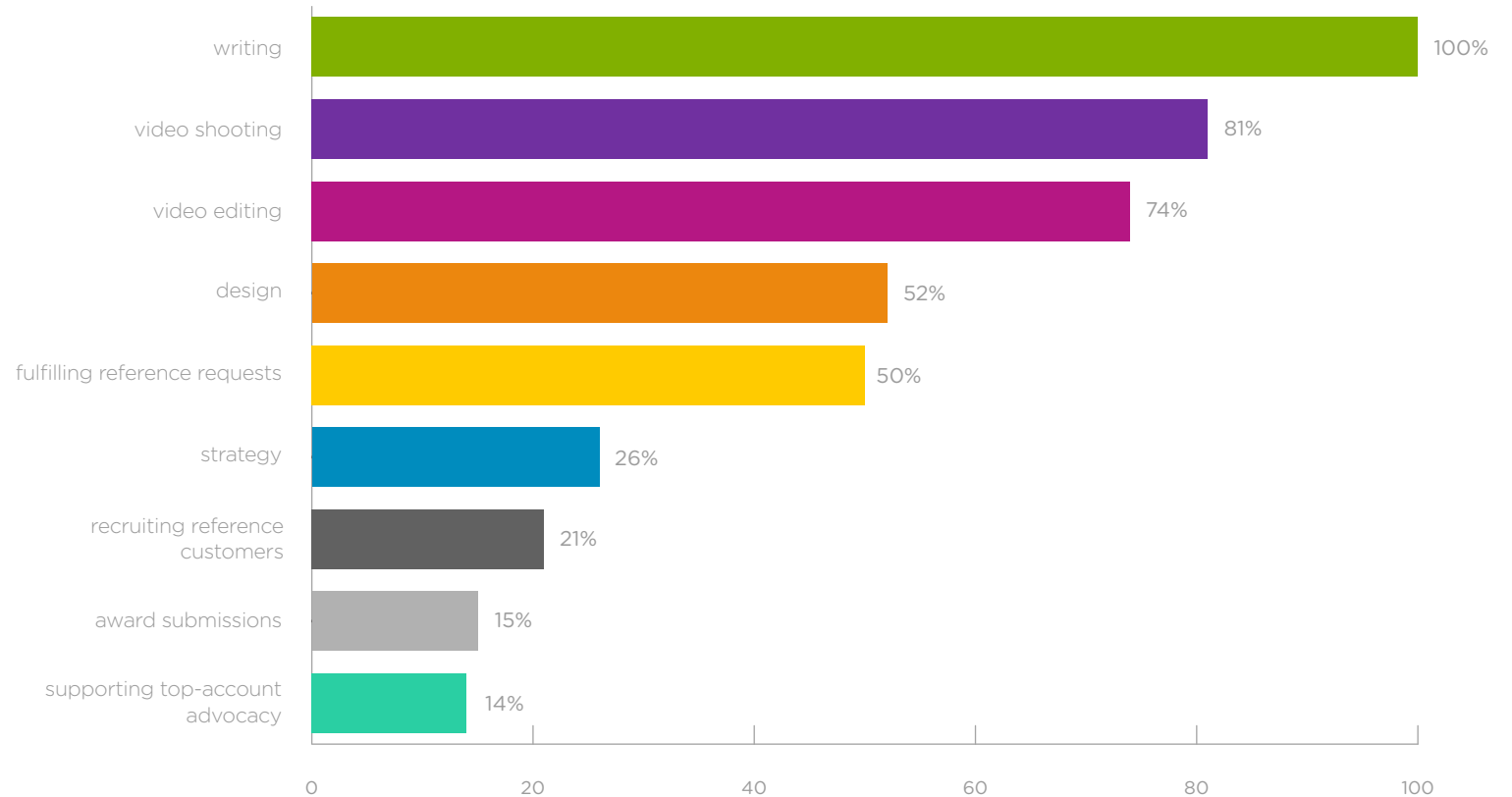


helping with the heavy lifting

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

For interest, here's a chart from the a previous edition of the survey (dropped to keep the survey length manageable)

- 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 for this edition, we would also expect agency support for customer communities to feature strongly
- We can also see some programs utilizing external support through the whole advocacy cycle: recruit, create, fulfill and measure, plus strategy and creative





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recruiting advocates

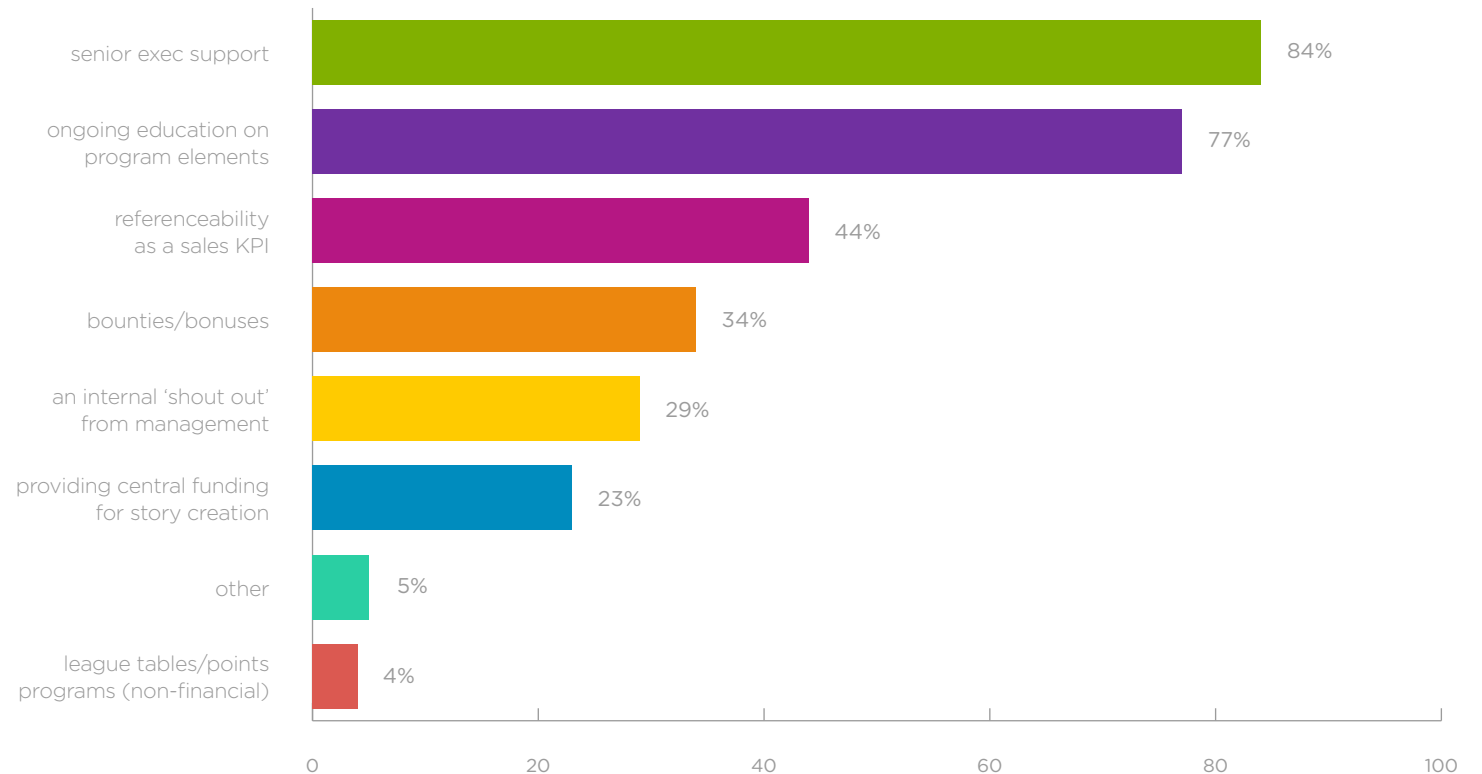
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execs, education and enticement

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

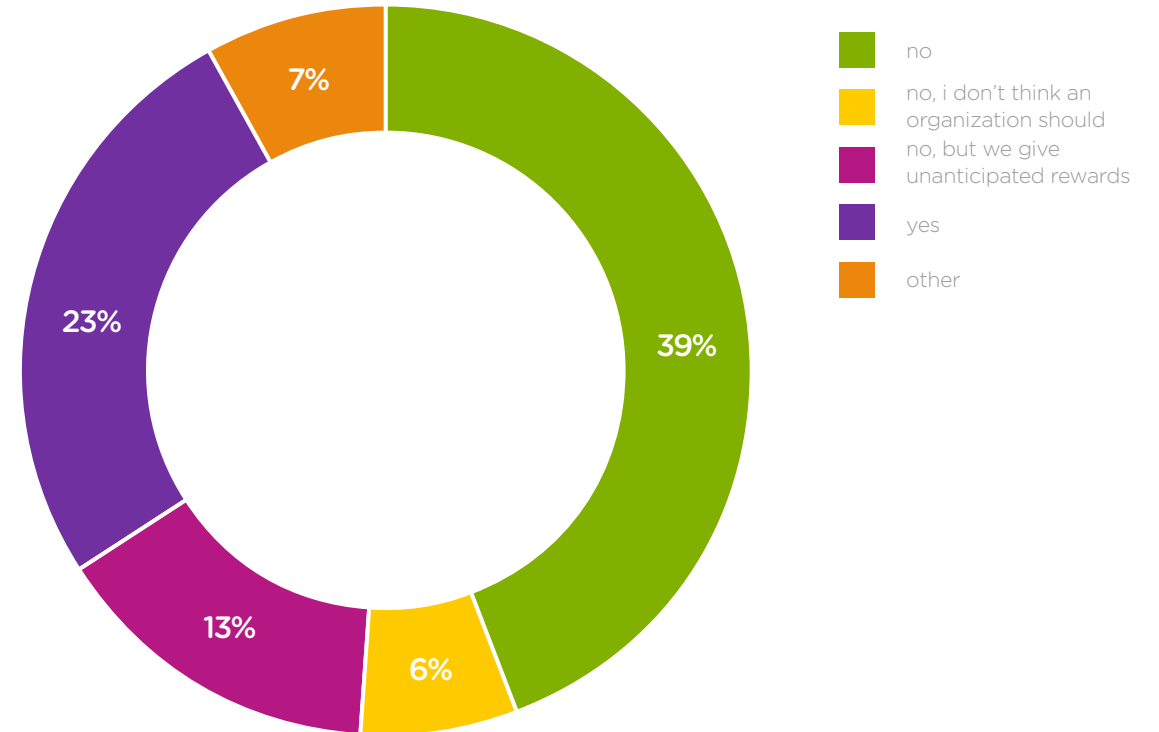
- Another question that yields pretty much the same results year after year
- It's often said that a successful program must have three things: 1) happy customers; 2) an engaged sales team; and 3) executive sponsorship. Of these, senior executive sponsorship is the one that can have the most impact,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



coin-operated?

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

- This question always shows polarization of views and this year is no exception with 45% of responders not incentivizing sales, or believing it should happen at all
- That said, programs providing incentives are still in the minority, only totaling 23%, with another 13% favoring unanticipated rewards
- As stated by a senior salesperson at a recent Advocate Marketing Academy event, “salespeople are coin-operated”. It’s certain that salespeople have a tough job, with lots of pressure on their time. In an ideal world incentives would not be required, yet some programs clearly take a more pragmatic approach
- Techniques mentioned in responses include: ongoing financial incentives, redeemable points, gift cards, specific sales program incentive funds (SPIFFs), as well as sales leadership recognition/kudos



is advocacy freely given?

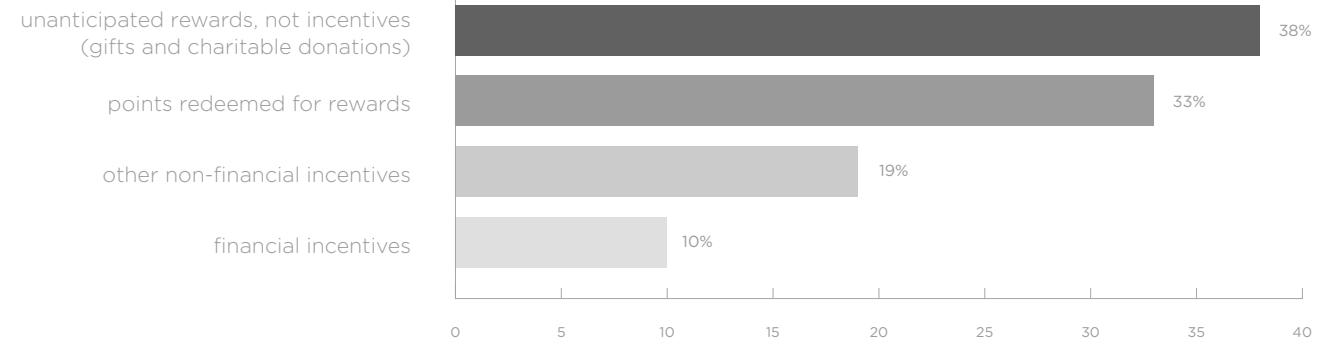
q: do you incentivize your customers to participate in reference activities?

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

do you incentivize?



if so, how?





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customer stories

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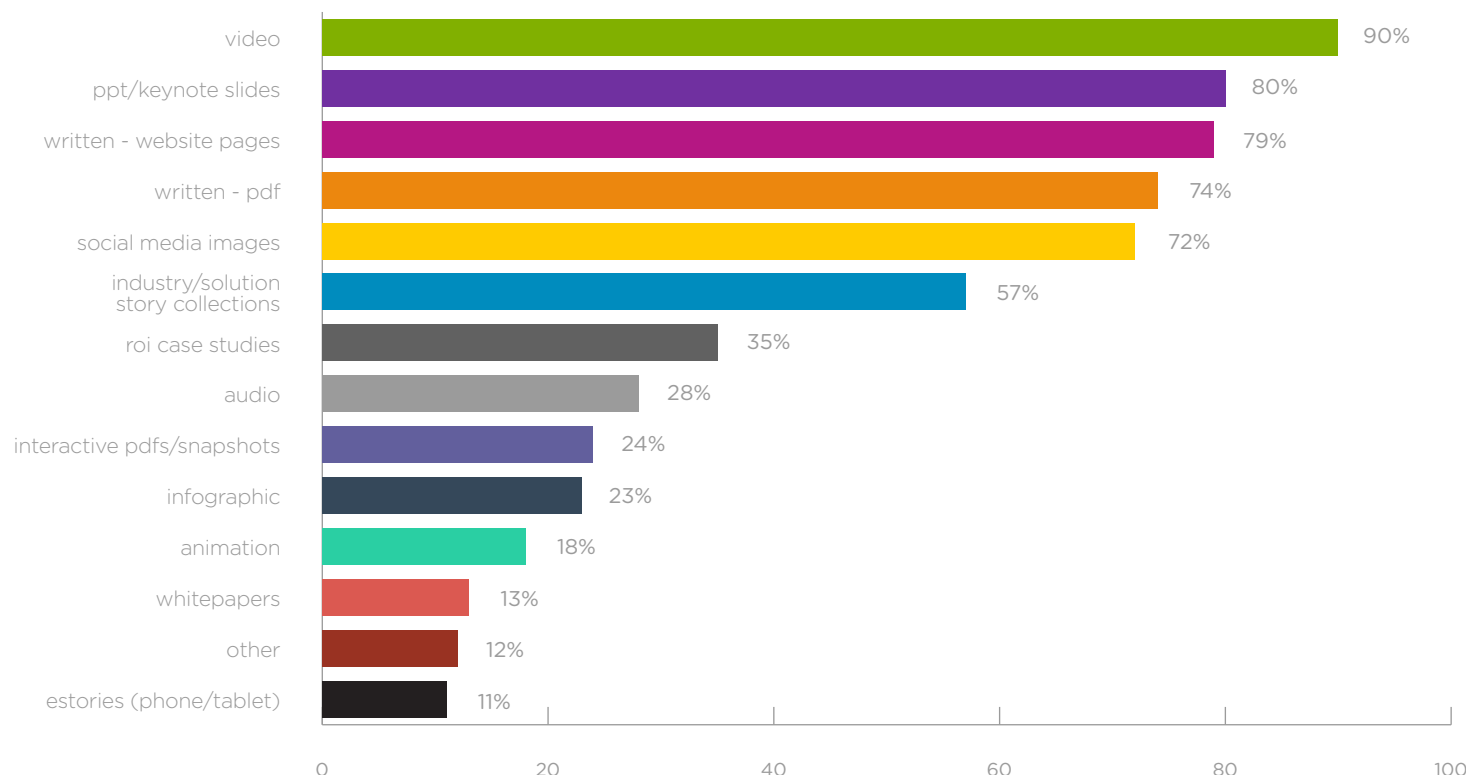
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video leads during a writing renaissance

q: in which formats do you create customer stories?

- Video has now been the most popular story asset type for three years, sitting at 90%. With the world shutting down, how video is created has changed significantly in that period
- That said, there's not really much between the top five asset types. Supporting salespeople means slides with everything, and everyone is seeing the renaissance of the written word; more written stories than ever (whether for pdf or web)
- The BoM (bill of materials) is going from strength to strength - it's composition varying dramatically in line with the strength of a story and its opportunity for amplification, sometimes two assets, sometimes >10
- There's a slight reduction in animation, while short social assets are more popular than ever





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fulfillment

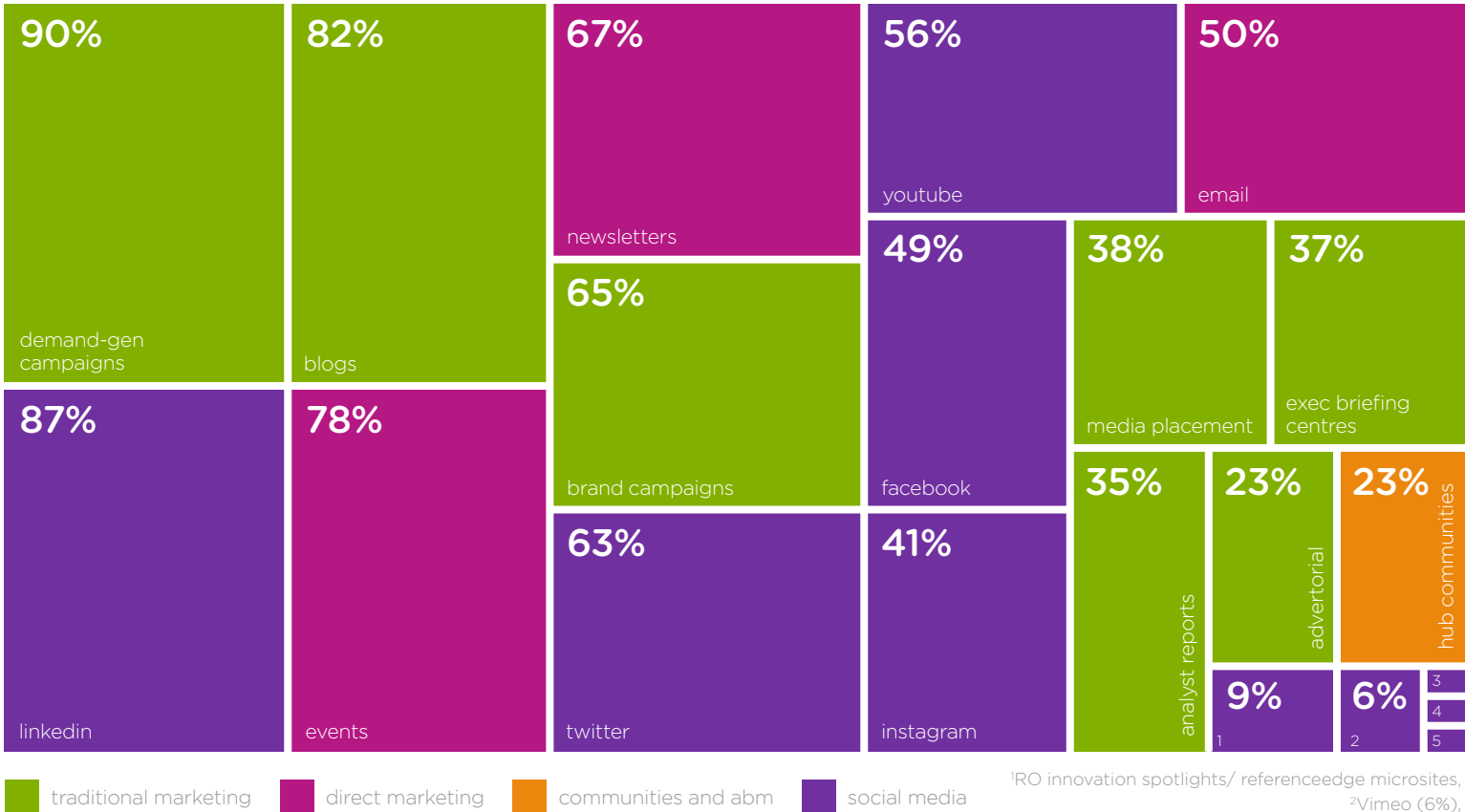
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amplification

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

- Pretty much everyone is using their corporate website, so we've removed this option from the chart on the right
- The big four this year are: demand-gen campaigns, LinkedIn, blogs and events, but it's fair to say customer stories are being used across all channels and marketing disciplines. How far things have come!
- On average, responders are using eight channels to amplify their stories, thus the growth of story BoMs
- It's great to see customer stories as part of brand campaigns for 65% of programs
- As with last year's survey, the use of blogs features highly (82%), a somewhat unexpected result

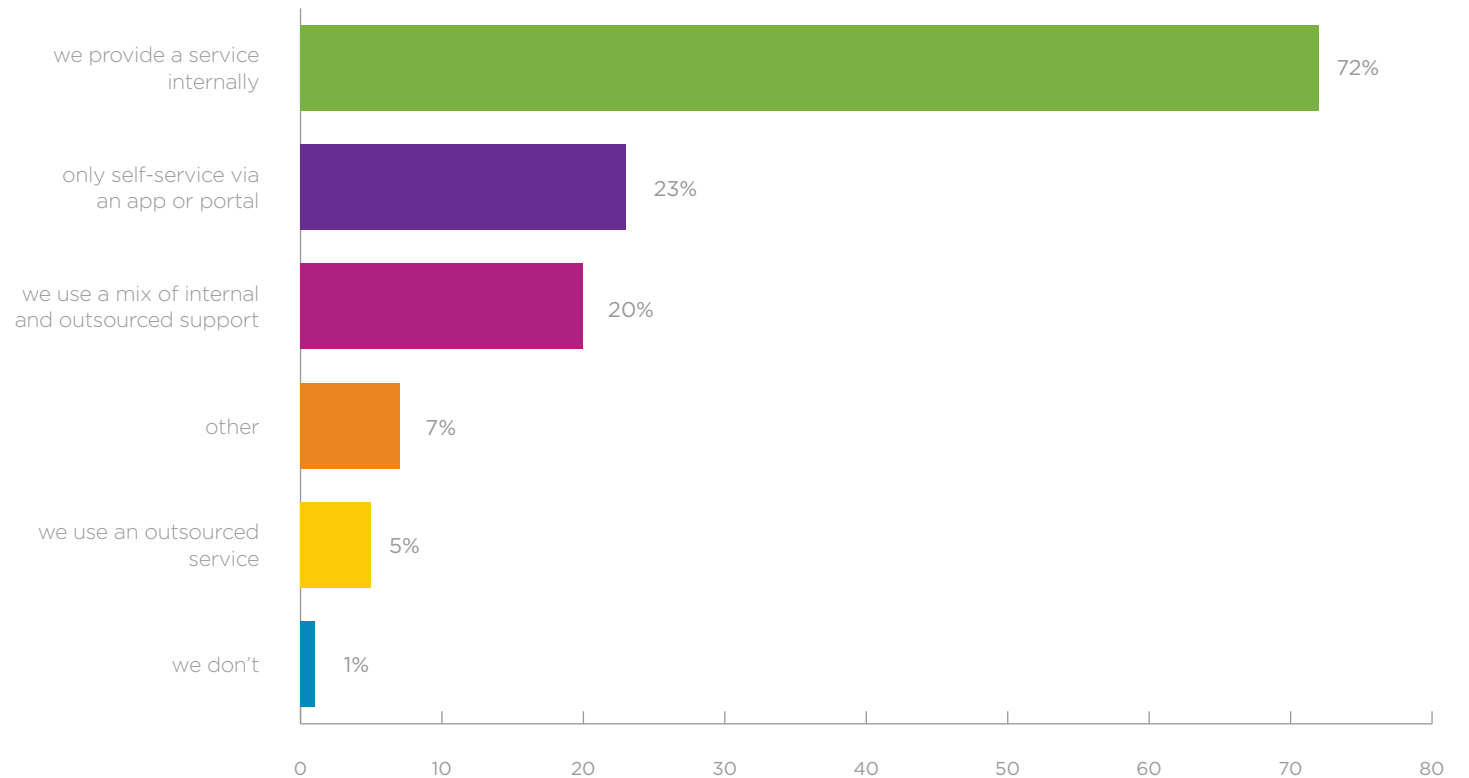


¹RO innovation spotlights/ referenceedge microsites,
²Vimeo (6%),
³Reddit (1%), ⁴ShareChat (1%), ⁵tiktok (1%)
corporate website (0%)

request wrangling

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

- In addition to comms amplification, 99% of responders also wish to get advocates and their stories into the hands of sales and marketing
- 23% 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 25% of responders outsource or use a hybrid internal/agency model





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measurement

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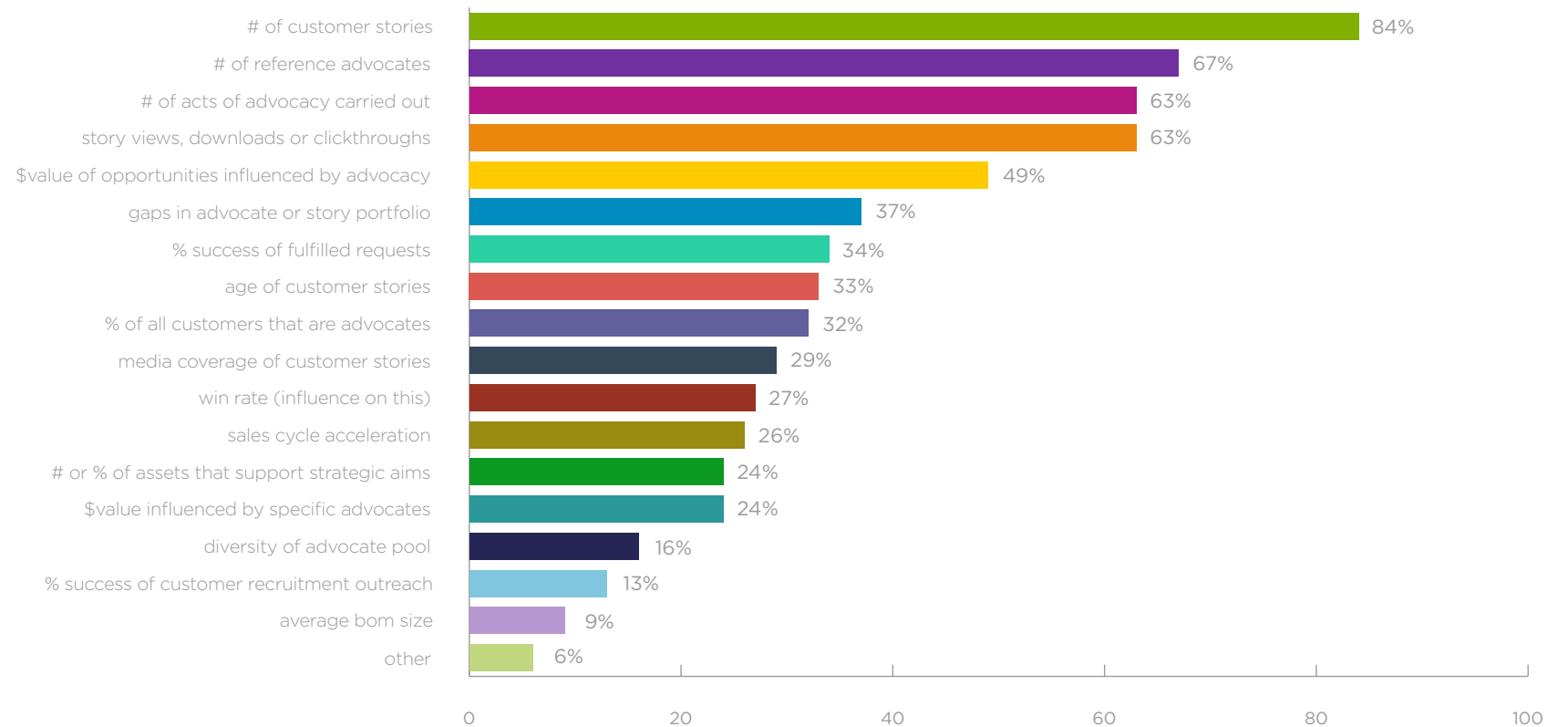
more meaningful metrics

q: which of the following does your program measure?



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- Being a customer advocacy manager is one of the few roles that can genuinely tie the work one does to \$value of opportunities influenced, and to the advocates themselves
- All the usual volume and value metrics are here and it's super to see that almost half of programs are measuring influenced opportunity values
- Also interesting to see is that, at 25%, more than twice the number of programs are now measuring the influence value of specific advocates. Great customer intelligence
- Diversity of the program's advocate pool is only noted by 16% of responders, almost no change from the last edition of this survey. A little disappointing





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diversity

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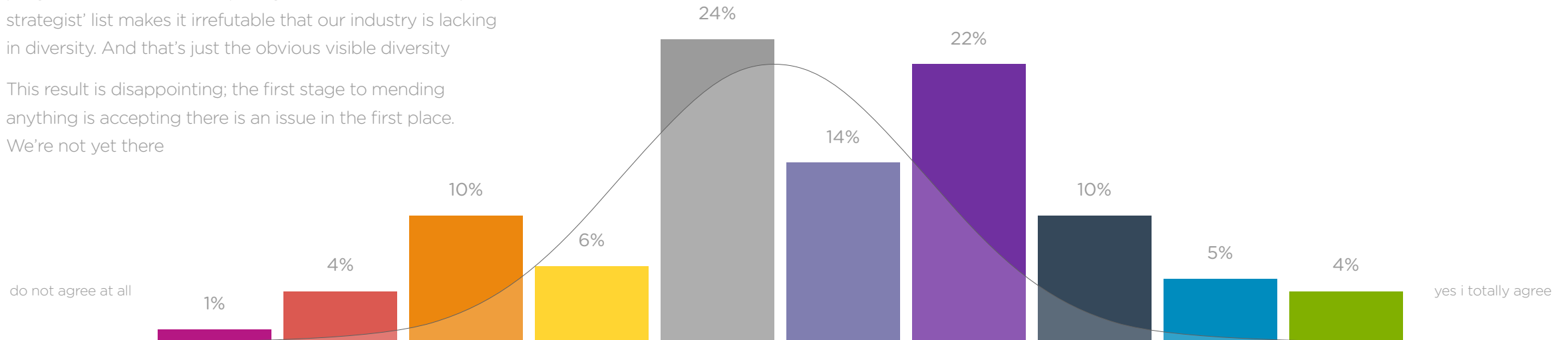
diversity apathy



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

- With 45% disagreeing vs. 55% agreeing pros ARE sufficiently diverse (to a greater or lesser extent) this result shows (at best) a lack of awareness or (more troublingly) a large degree of apathy
- Just perusing LinkedIn, looking at event attendees and program teams, or even a quick glance at the recent 'top 100 strategist' list makes it irrefutable that our industry is lacking in diversity. And that's just the obvious visible diversity
- This result is disappointing; the first stage to mending anything is accepting there is an issue in the first place. We're not yet there

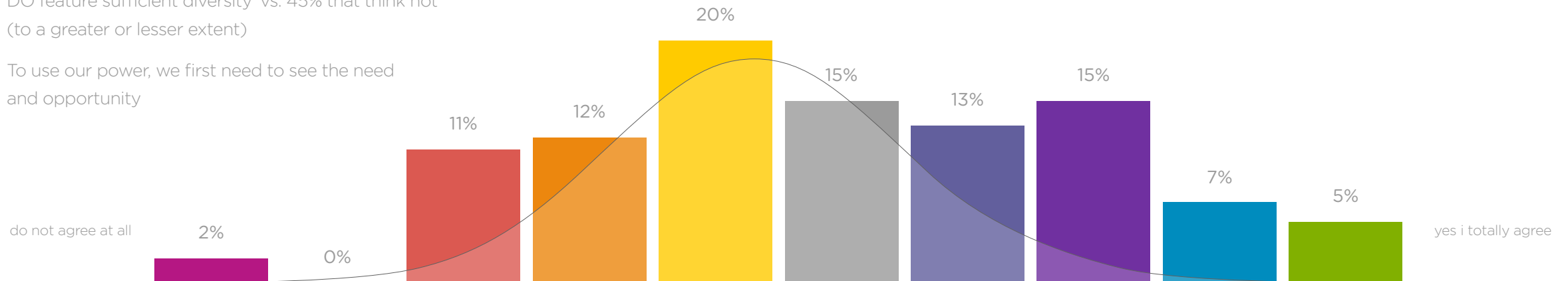




are we agents of change?

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

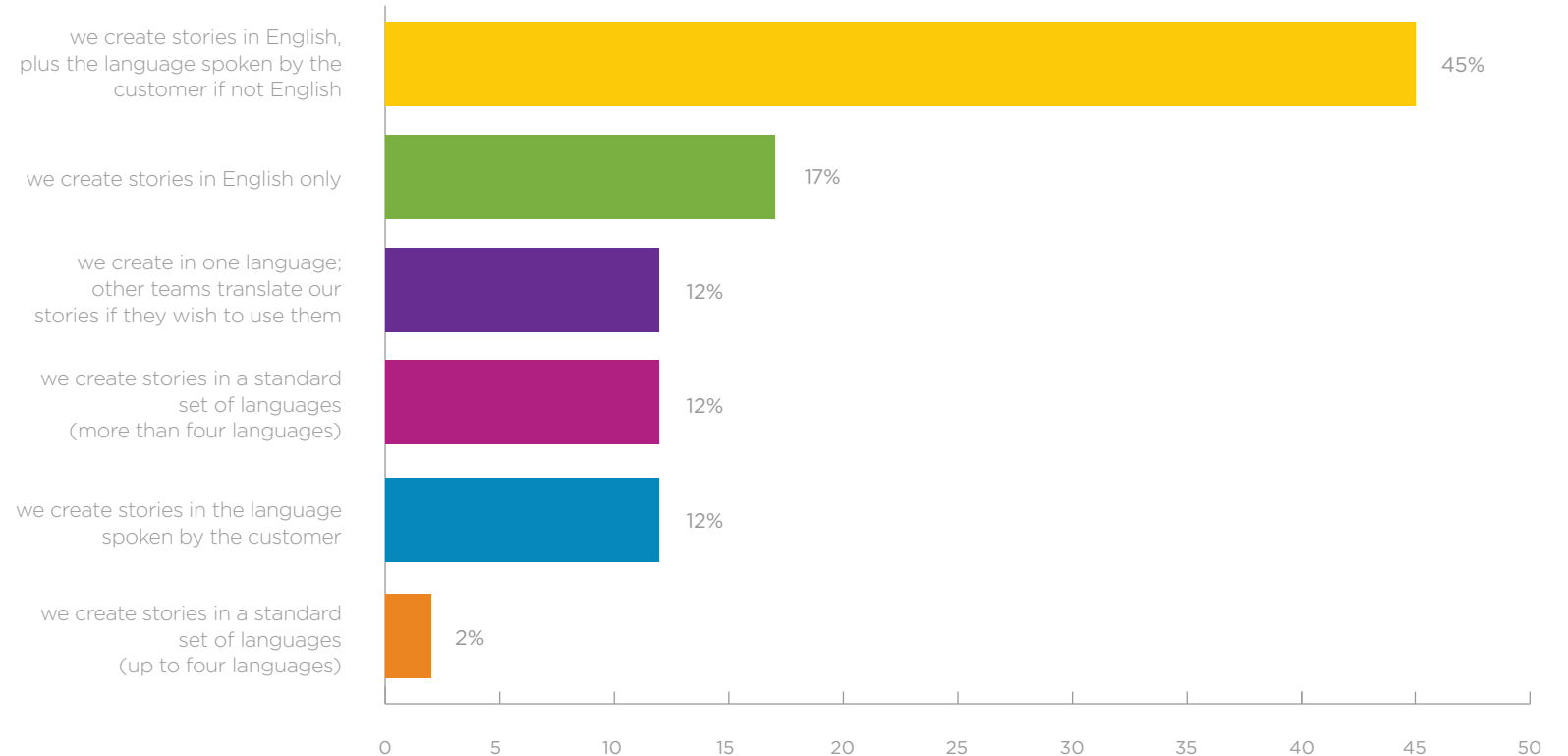
- Advocate marketers are in a privileged position, with the power to increase visible representation through the diversity of advocates featured in our stories and all forms of advocacy
- From a previous question we learned only 16% responders are measuring the diversity of their advocate pool
- 55% of responders agree with the statement that 'stories DO feature sufficient diversity' vs. 45% that think not (to a greater or lesser extent)
- To use our power, we first need to see the need and opportunity



parlez vous anglais?

q: what's your approach to creating stories in the language of your customer?

- When communicating for the purpose of influence (which is what we all do), empathy and relevance are everything
- While English remains the primary business language for responders to this survey, it's great to see the majority of programs enable relevance and accessibility of their stories for their customers and prospects through language



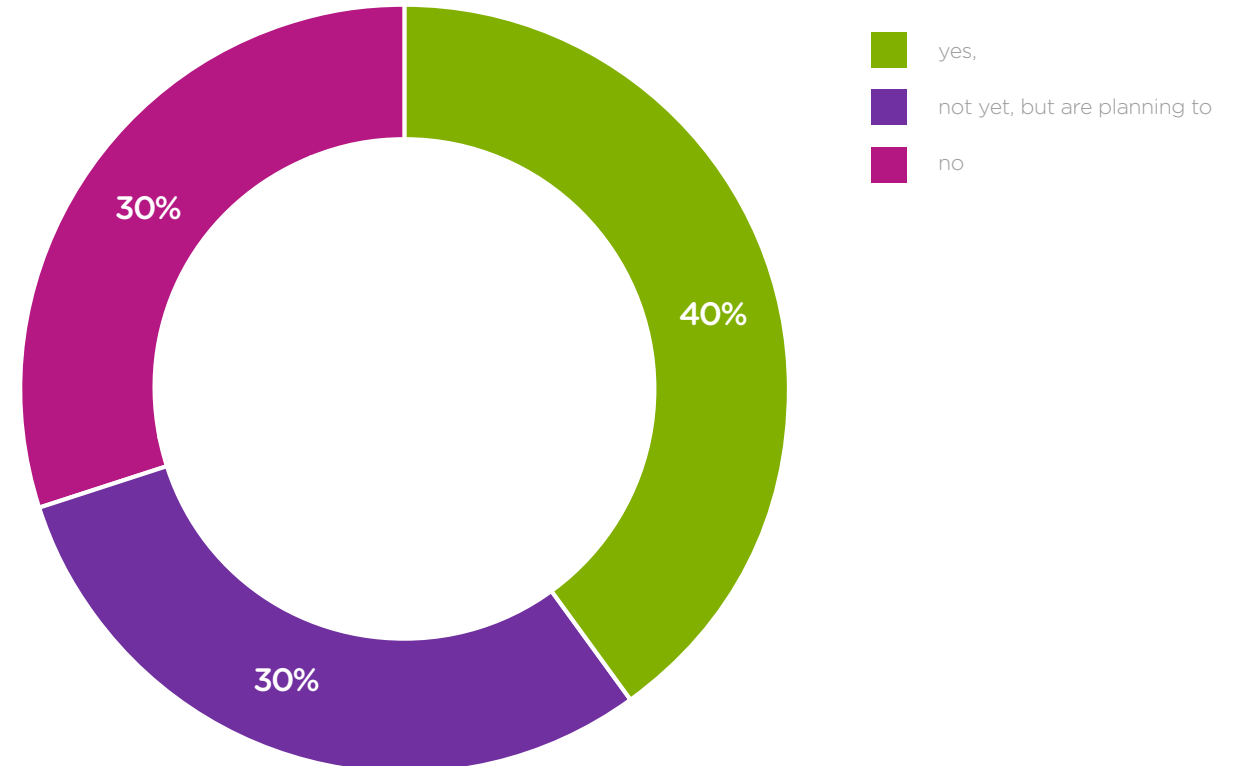
equal access



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

- While the 'yes' responses have increased by 5% to 40%, those 'planning to' is static at 30%
- Those saying they are not thinking about the accessibility of stories is down by 5% to 30%. That's still over a quarter of responders not considering how people with disability, such as hearing- or sight-impaired, experience the content they create
- Techniques being utilized:
 - Video edit pace enabling audio description
 - Lowering the level of background music
 - Subtitle files that allow the viewer to adjust font size
 - Slower edits, reduction in flashing light
 - Using alt tags on all images
 - Using a descriptive title for links
 - Ensuring content can be navigated using a keyboard





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future

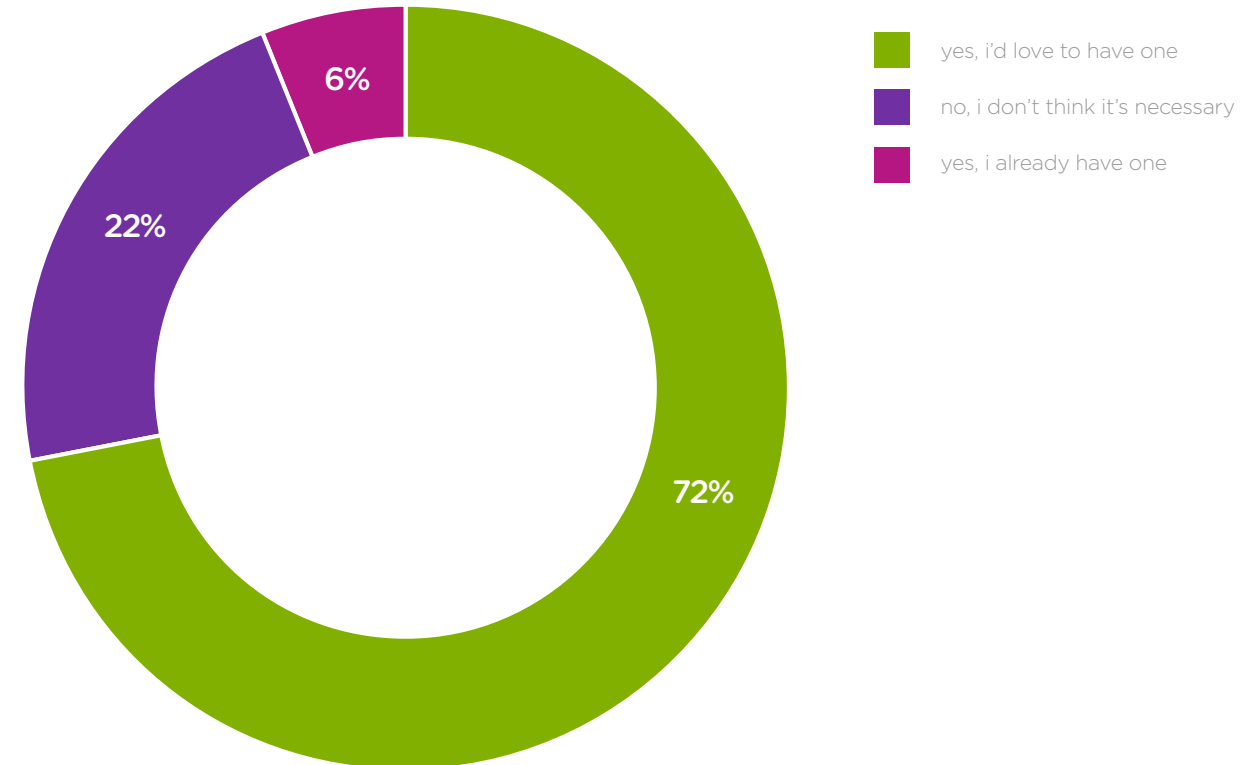
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pastime becomes profession

q: would you like to have a globally recognized, formal, specific customer advocacy qualification?

- The responders to this edition of the survey are serious customer advocacy professionals; 6% already have a customer-advocacy qualification, 72% would 'love to have one' and only 22% don't believe it's something that's necessary
- CCAP qualifications have gained a lot of traction and the challenge for our industry is how to best deal with the sheer number of new courses and tests popping up. We all agree tests must be company-agnostic and built with rigor and testing on universally agreed benchmarks and standards
- It's super to see so many advocate marketers helping to drive the profession forwards; the spirit of collaboration and sharing is exceptional. Talking of sharing, as well as events, [Advocate Marketing Academy](#) has also made its [knowledgebase](#) freely accessible to the whole community. You can find presentations from the 'who's who' of customer advocacy, plus research and other useful items



about us



inEvidence

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

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

Advocate Marketing Academy

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

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



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