

THE IMPACT OF MARKETING PART 2

CIM
The Chartered
Institute of Marketing

DIGITAL VISION: LIVING ON THE CUTTING EDGE



FOREWORD

The second in our series on the impact of marketing, 'Digital Vision: living on the cutting edge', explores the marketer's relationship with the online world. How we as professional marketers feel about it. Whether we are keeping up with the digital transformation. And if, in fact, we've become too distracted by it and lost focus on our core skills.

We find that it is not just older marketers who are feeling the rapid pace of digital advancement snapping at their heels. Marketers across all age groups believe they have a digital deficit compared with the generation coming through. 71% of the marketers we spoke to said people younger than themselves were ahead in terms of digital marketing skills. This view was as common among under 30s as among over 50s.

Recent months have thrown us headlong into an even more rapid digital transformation. Online purchasing has increased significantly, social platforms have seen huge jumps in usage and for many of us, our workplaces, even our relationships, have become digital first.

At CIM we have seen demand for our latest digital training dramatically increase. It is important and right that our first response as marketing professionals is to adapt and upskill for the next challenge. But there may be a danger in doing so, that we are falling into the habit of being reactive, and run the risk of temporarily forgetting what marketing is really all about.

This report warns that in the search for digital expertise, marketers are still becoming increasingly specialist, more so than at any time in the history of our profession. The view that core skills continue to be sacrificed due to the focus on digital is widespread among the marketing community and if an economic downturn means less money for learning and development, the issue could be exacerbated.

Whilst digital skills are essential, a specialist lacking broader marketing skills risks being left behind when the next technological leap occurs, or next career level role becomes available, leaving them unable to adapt.

As the chartered body for marketers, we have a competency framework that sets out the balance of skills needed to be successful in the industry. We are urging our sector leaders to ensure that they are keeping a watchful eye on their teams and taking responsibility for individual professional development.

In the drive to build the most highly-skilled teams, we mustn't lose sight of the individuals that make up those teams and take personal responsibility for ensuring we are developing well-rounded professional marketers, with the core skills to tackle the next marketing challenge.


Chris Daly
Chief Executive, Chartered Institute of Marketing






CONTENTS

FOREWORD	2
THE CHALLENGE FACING THE MARKETING SECTOR	5
THE IMPORTANCE AND DELIVERY OF MARKETING TRAINING TODAY	6
WHERE ARE THE REAL GAPS?	9
THE DIGITAL SKILLS CONFIDENCE GAP	10
THE GENERATION GAP ASSERTED	13
OBSERVATIONS AND TRENDS	14
ADAPTING TRAINING TO THE NEEDS OF EVERY GENERATION	15
CONCLUSION	16



Keeping fresh and relevant with your marketing knowledge and expertise is more important now than ever across all generations. Investing time and resources into ensuring both leaders and their teams are at the very top of their game in delivering marketing best practise is vital in the highly competitive and fast moving industries we find ourselves in. Marketing remains an exciting and varied career choice and we all need to play our part to shape the industry to be its very best during this time of unprecedented change.



Pete Markey, Chief Marketing Officer, TSB Bank



ABOUT THIS RESEARCH

Opinium conducted two-stage research, starting with an online survey of 1,000 marketing professionals, followed by 200 interviews with CIM members. The first stage of research took place between 3 – 13 September 2019, with CIM members being interviewed between 18 September – 14 October 2019. Additional research both desk and via the CIM membership base was undertaken between July–August 2020 to ensure the report's findings were accurate, relevant, and reflected the market post COVID-19.

THE CHALLENGE FACING THE MARKETING SECTOR

This report sets out the scale of the challenge our sector faces as we move past the tipping point at which 'digital natives', born after 1980, become the majority population within the 400,000 strong UK marketing community.

It explores the significant progress of so called 'digital immigrants' in making the most of modern marketing tools, and explores the impact of a shift in skills on current practice in the provision of learning and development within the marketing profession.

The concept of 'digital natives' and 'digital immigrants', that is the difference between those born after 1980 who grew up with widespread access to digital technologies and those born before, has been commonly accepted for the last twenty years.

What is interesting is how some of those preconceptions of the difference between today's under 40s and those over 40 have become synonymous with much more recent shifts in technology.

According to our research, 71% of respondents believed that younger people were ahead of their older peers in terms of digital marketing skills. This is as prevalent today amongst those aged under 30 as it is amongst those over 50.

Indeed, far from a discontinuity in knowledge between those over and under 40, it seems they're more alike than not. Roughly half of all those either side of being born in 1980 experience difficulty in keeping up with technology. This is in contrast to significantly lower numbers in the generations before and after this "digital discontinuity". Our research shows that the numbers experiencing difficulty falls to 41% amongst under 24s and 38% of over 45s.

Instead, it seems that every generation has its technological watershed moment or digital divide.

20 years on from the concept of digital natives and immigrants, we are now seeing the rise of the first social natives, and a rising sense of uncertainty amongst social immigrants.

The perceived importance of social media rises steadily with age, from 62% amongst under 24s to 72% amongst those aged 55-64. 69% of respondents saw social media as more important than it was five years ago while up to 43% felt social media skills were not common.

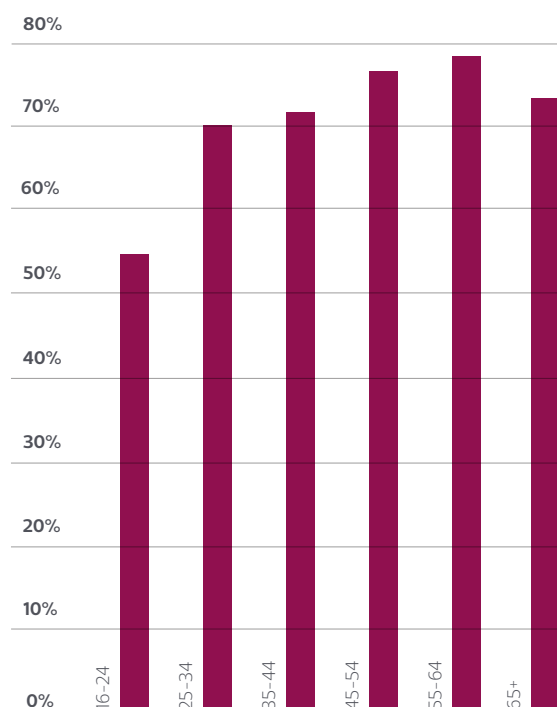
Whatever the underlying technological shift, it is clear that the preconception that digital skills are linked to age in favour of younger people is a strong and pervasive belief.

That belief is likely driven by the perception that younger people have not only grown up with such technology, but are also early adopters of it in their personal lives. They also benefit from the fact that such new technologies will have been present in the workplace for more of their working careers.

While those over the age of 40 will just about recall the phasing out of faxes and introduction of email, it is clear that the marketing function has changed significantly over the last thirty years and will continue to do so.

Whether or not we accept the premise of digital natives and immigrants, it is clear that the implications of today's experts schooling tomorrow's practitioners on tools and technologies with which their students are more familiar, will remain a significant challenge.

Proportion who agree young people are ahead of older generations in digital marketing



THE IMPORTANCE AND DELIVERY OF MARKETING TRAINING TODAY

Before we explore the impact of a “digital divide” it is important to consider overall attitudes to marketing training.

Respondents to our research appear to recognise the importance of structured learning. Professionals working in marketing but not specifically in the marketing sector (so working in departments but not in agencies) were asked how important skills and training were to the future success of their organisations.

Reassuringly, only 2% of those working in a marketing department thought it was not important at all, increasing to 7% of senior managers with sole responsibility for marketing; the net figures suggested that 86% of people working in these departments felt training and skills were important, falling to 81% when the question applied only to senior managers.

We cannot disregard that nearly a fifth of those we spoke to felt training and skills were not important, as this is still a significant minority of people. Balancing this, it is

worth noting that a substantial amount of learning and development is happening, so one potential reason for this perception of its lack of importance is that those who feel this way may not have been recently exposed to relevant training.

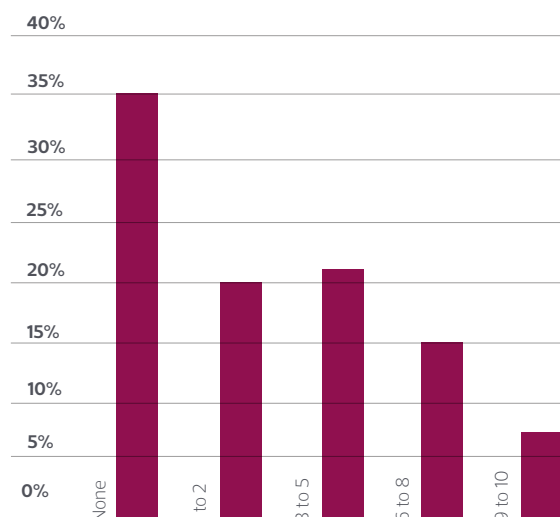
It is notable that amongst CIM members, just 5 per cent felt this way, in contrast to 19 per cent of general marketing professionals. Likewise, those who feel that training is less important, are also less likely to have attended training in the last two years, and overall, attended fewer training courses across their careers.

On average the marketing professionals we surveyed had taken part in three internal or external training courses, events or conferences over the past two years to improve their marketing skills. However, a third (35%) said they had received no training at all.

The majority of learning and development was delivered by external trainers (44%) or professional organisations (36%) and a quarter was provided in-house. This figure is consistent between CIM members and those we surveyed from a general marketing population.

The need for on-going development, then, is recognised but the shape and degree of professionalism of its delivery is highly variable. We should therefore ask whether employers are providing marketers with the skills and training they require to thrive in their careers.

Number of training courses attended to improve marketing skills in the past two years





86% FELT TRAINING WAS
IMPORTANT BUT **35%** HAD
RECEIVED NO TRAINING AT ALL



PROFICIENCY IN TECHNOLOGY WAS
SEEN AS AN ISSUE BY **41%**

59% DIDN'T FEEL COPYWRITING
SKILLS WERE COMMON IN THE SECTOR

WHERE ARE THE REAL GAPS?

If the formal act of training is to achieve anything, then the aim must be to build on areas in which there are skills gaps within an organisation. It is therefore essential to understand where the industry itself believes the gaps actually are.

A third of the CIM members surveyed for this report cited communication as a skill that was lacking in those practising marketing, and 31% of them completed a course in precisely that discipline over the previous two years.

A striking 59 per cent said copywriting wasn't common in the sector, and data analysis was cited by 61% as a gap.

It is notable that, in contrast to perception of a digital skills gap, proficiency in technology was only seen as an issue by a relatively low 41%. Technology in and of itself, in spite of the many courses on offer in the open market, is not seen as a significant skills gap.

Research conducted with Target Internet in 2018 and repeated in 2020 may offer an explanation. This examination of the skill sets of almost 9,000 marketing professionals found a dramatic shift in the digital marketing skills of the sector's junior level marketers.

Over the past two years, the skills of the marketing sectors' interns, graduates and executives have improved dramatically, while those of the people who manage them have stayed at about the same level and in some areas fallen.

In some critical areas, such as data and analytics, social media and Search Engine Optimisation (SEO), it is clear junior staff have focused on their development, improving their digital skills to address key customer requirements or to further their careers. The specialists have become more expert, whilst, managers and heads have focused more across a breadth of digital and fundamental skills and in some cases have fallen back where digital skills and knowledge is concerned.

The most striking improvement in digital skills since 2018 has been among interns, suggesting that the newest generation of marketers are entering the marketplace far more highly skilled than their recent predecessors.

- Intern improvement – Interns' scores on data and analytics skills jumped from 15% to 28%, on digital strategy from 6% to 24% and on general marketing from 12% to 30%.
- Heading downwards – Digital skills among heads of department have fallen across many digital disciplines measured by the benchmark, most notably in SEO.
- Directors are focused elsewhere – Two years ago it was clear the digital skills gap at director level was an issue. This has improved slightly in some cases, but gaps remain.
- Email in decline – Scores for email marketing have fallen at the same time as industries have become less reliant on email as a marketing channel.
- Growing complexity – Social Media, SEO and Usability have all seen slight decreases in scores as these disciplines have become increasingly complex.

The results reveal that the pace of technology has shown no signs of slowing down and the marketing profession continues to evolve in the range of skills required to be effective. Many organisations have changed the shape of their marketing functions to meet market demands. Technical roles such as pay-per-click (PPC) and SEO have been moved in-house, reducing both the cost and reliance on outsourcing, whilst ensuring those who carry out these roles are truly experts in their field.

The complex nature of digital means that in some places marketers need to be continually upskilling themselves just to stay in the same place. The trend that junior marketers are seeing significant investment in their development and increasing their technical knowledge is positive as businesses look to fill previous gaps in skill sets.



THE DIGITAL SKILLS CONFIDENCE GAP

It is clear that the core and technical skills within CIM's Professional Marketing Competencies remain as relevant as ever to the marketing community.

Across the 18 categories we assessed, only persuasion skills were seen as relatively uncommon within the profession. The other 17 skills were on average all more likely to be seen than not according to those we surveyed.

This is reflected in our research, 61% of CIM members feel well prepared for any changes the industry is likely to face in the coming decade. Of course this still leaves 39% feeling unsure as to their capability for overcoming challenges, although they feel well prepared for today. 78% feel fairly or well-equipped to do their jobs at the time of the survey.

Such uncertainty about what the future may hold reflects the dynamism of the marketing sector. Across the core marketing skills we assessed, three out of five people said communication was more important than they had believed five years ago, with 58% saying the same about creativity and the same number expressing the same thing about commercial awareness. However, the ever increasing strong presence of digital, means that many marketers don't get the time to focus on these areas.

In terms of digital integration, key technical skills such as social media, data analysis and technological proficiency were picked as increasingly important. Worryingly two fifths (41%) of those we spoke to felt basic technological proficiency was uncommon across the wider marketing sector.

It appears that the lack of confidence we identified earlier amongst those with responsibility for learning and development is reflected in a wider uncertainty over the extent of digital skills within the marketing community, and a consequent upweighting of training provision.

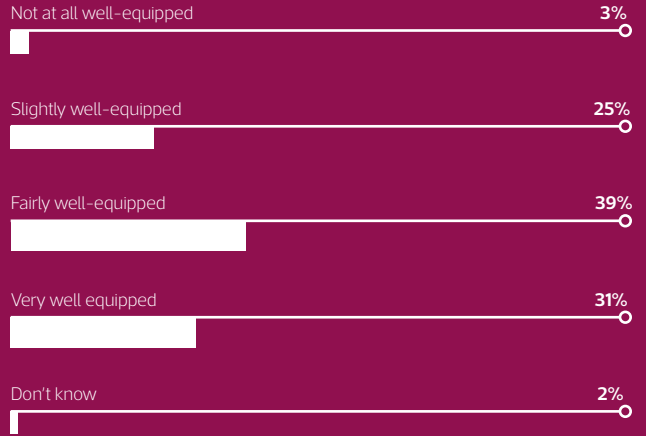
While there is no dispute that digital skills are essential; in the face of limited development budgets it is clear that digital skills have to be taught at the expense of something else. What impact therefore is the uncertainty of "digital immigrants" as to technological capability having on the futures of "digital natives?"


60 per cent of those we spoke to believe that a focus on digital skills comes at the expense of core marketing skills. This is felt significantly more keenly amongst 25-44 year olds than amongst those over 45. Those over the age of 45 were also more likely to feel their organisation lacked the processes and knowledge to equip them for the future.





How well-equipped do marketers feel to perform their role






While the outlook on our world of work is riddled with uncertainty, what we do know is that digital transformation plays a vital role in shaping the future of the marketing sector. Marketers are no strangers to the importance of technology, but the rapid shift to working, shopping and socialising entirely online has accelerated its role and significance in understanding the customer and improving their experience.

Much of our lives will stay online for the foreseeable future, so marketers need to invest in the skills which will enable them to use technology to evaluate data and extract insights from it. In turn, this will enable their brand to connect with the customer at speed; offer personalisation and efficiency; and increase engagement and retention. Transforming the shape of a marketing team will require agility, investment in skills and a place where continued learning is encouraged.

Technology and data will only become more embedded in the marketing function, but the ability to innovate, influence, engage and adapt will always remain the cornerstones of great marketing. As the impact of the pandemic eventually subsides, I'm looking forward to seeing how marketers respond to this blended approach – utilising technology whilst retaining the essence of what marketing is. Continuing to pioneer in a new era of work while staying true to what makes us different will put marketers in pole position to thrive through changes and the inevitable challenges the future will bring.



Clare Kemsley, Director of Hays Marketing



62% OF 55-64 YEAR OLDS HAD RECEIVED NO TRAINING IN THE PAST TWO YEARS



THE GENERATION GAP ASSERTED

Since our research relies upon the measures of self-awareness and self-assessment of the level of skills amongst those we surveyed, it is important to look at less subjective benchmarks such as individuals' personal feelings of influence over their development.

Overall three quarters of respondents felt they had moderate or major influence, and this was more pronounced amongst senior managers.

Whereas, 53% of people overall felt they had a major influence over their development, this drops to 38% for the under-24s. It nudges up to 43% for the 25-34s and eventually reaches a peak of 65% for the 46-54s, when it starts to dip again.

This feeling of power over the setting of development varies by age, and reflects our earlier finding of a generational gap in confidence over technological proficiency. This implies that a disproportionate amount may be allocated toward digital skills.

In the wake of the widespread economic disruption from the COVID-19 pandemic, it is likely that training and development budgets will be under pressure in the coming months as budgets are cut to reflect straitened times. It is clear that

professional development is to become even more important as the employment landscape shifts and the shapes of marketing teams undergo further change.

At the time of writing this report, we are seeing some dramatic shifts in both how learning is delivered and who is paying for it. Across the globe, measures such as furloughing staff due to COVID-19 or cost-cutting measures by employers have left many marketers uncertain of what the future holds.

An increased number of individuals engaged with CIM in early 2020 funded their own learning and development while provision from employers declined. Whilst this comes as no surprise, the reduced focus on learning and development by organisations may have yet further unforeseen impacts ahead.

In light of our findings that organisations are already placing undue emphasis on digital skills, a subsequent reduction in investment in learning and development could put marketers at further risk in the ever changing landscape that they now find themselves having to operate in. A landscape where both digital competence and core skills are becoming more required. Whether this is a short term trend remains to be seen.



THE IMPACT OF COVID-19 ON LEARNING AND DEVELOPMENT

COVID-19 continues to have a dramatic impact on organisations and consumers alike. Buying behaviours have seen a significant shift to online, working practices went remote and career paths have had to be rethought.

The need to embrace digital skills such as video conferencing, online advertising and social media saw large numbers of people throughout the world, of all ages, upskilling themselves to adapt to the 'new normal'.

At the start of the lockdown, CIM moved the delivery of over 70 of its training courses to live virtual and online methods to meet a growing demand for learning and development which could be undertaken remotely or around work. Alongside many marketers, our own staff have taken the opportunity to upskill themselves using the new online and virtual course options.

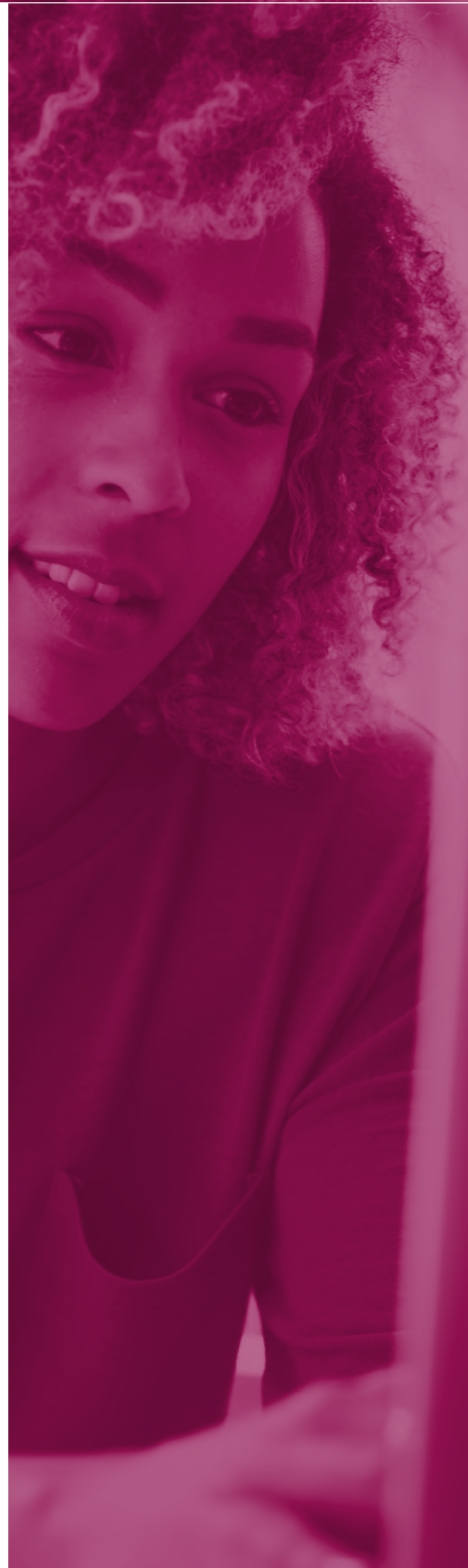
We've seen marketers on furlough have used the time whilst not working to engage with courses, qualifications and membership to ready themselves for what still is an unknown return to working life. With the work life balance button being forcibly reset, many marketers have had time to reflect on their careers and have put aside time for themselves to upskill and prioritise their professional development.

Those marketers still in active employment are also choosing to upskill to protect themselves or in preparation to move into new roles. Virtual and online engagement is proving an effective way to learn, with some marketers preferring learning from their own homes as they feel more relaxed and less anxious. In addition to virtual and online learning, there is also a growing trend towards the option to engage with bitesize and modular study. In times of uncertainty, being able to learn in a way that is flexible and manageable makes it a more viable option.

Aside from formal training, how our members and the wider marketing community have chosen to engage and consume content has also changed. Visitors have spent more time engaging with content in a more meaningful way. Webinars and podcasts consistently remain the most engaged content formats and audience engagement has grown significantly throughout the pandemic.

Sharing relevant content to support our members and followers as their situation changes has been critical. As a business we've ensured our social channels are delivering what people want based on sentiment and engagement. In addition to posting and sharing CIM generated content, we have also seen a significant increase in user generated content. A growing trend towards people keen to share their experiences and accomplishments, as well as offer advice and help to people, whether it be upskilling, finding hacks around challenges or navigating their career options and opportunities. Mentoring and coaching have also grown in popularity as people look for other ways to support and be supported.

As the landscape continues to shift and the shape of marketing teams change, we will use our ongoing engagement to share insights and develop propositions to support our members and the wider marketing community to continually develop in our fast-paced profession.



ADAPTING TRAINING TO THE NEEDS OF EVERY GENERATION

As we have already discussed, the majority of those we spoke to had attended on average three internal or external training courses, events or conferences over the past two years. It is important to understand how learning and development programmes are procured, and how context is balanced against content and accessibility.

When it comes to formal training, the majority appears to be focused upon the incoming generation; only seven per cent of young people (aged 16–24) had received no training in the previous two years, increasing to 12% in the 25–34 age group.

While this still leaves almost a fifth of the under-35s receiving no training at all; this untrained figure increases with age, with 74% of over-65s receiving no extra training and 62% of the 55–64s.

The provision of training reflects the return an employer or individual feels they will get out of the investment. While the adage “you can’t teach an old dog new tricks” likely doesn’t apply to proficiency in data analysis, the opportunity to deploy such skills and earn back the cost of training will reduce with age.

It is important to note that this is a challenge for all professions, not simply marketing. Deloitte’s April 2015 study ‘Building Competitive Advantage with Talent’, concluded that only about 10–15 per cent of companies have well-developed learning and development programmes that reflect the needs of the full workforce.

Another factor in the lower level of provision of training for older employees is an overreliance on experience over formal training. The widely accepted Charles Jennings’ 70:20:10 Learning Model concludes that 70% of actual learning is through ‘Experience’ (i.e. actual practice at work), 20% is through ‘Exposure’ to informal, social learning & coaching and only 10% through formal classroom courses and other ‘Education’.

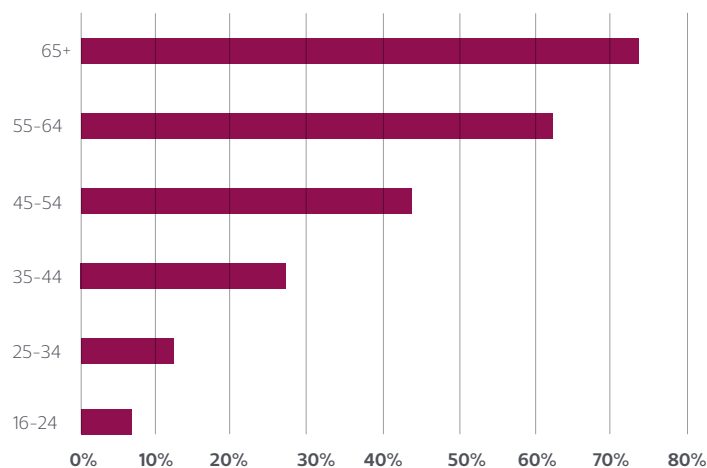
It is difficult to track exactly how much informal training through exposure and experience is actually happening. Many of those offered on-the-job training by colleagues and managers may not even regard this as training, however, some of the most important learning you’ll ever have in your career is through experience and conversations with your peers.

It is worth highlighting that older respondents report being given more leeway than their younger counterparts in their training and skill acquisition, with a nine point gap between those aged under 34 and those aged between 46 and 54 saying they have major influence over their training. This suggests that younger professionals are more likely to be offered a more general ‘out of the box’ approach as opposed to development specifically tailored to their needs.

As the working life of professionals increases worldwide to reflect changing attitudes to age and health, it is becoming increasingly illogical to neglect the training of older employees. A 55 year old, with 12 years to go before reaching retirement age, should not have to rely purely on experience with no formal skill top-ups. As we have highlighted six in ten marketing professionals, regardless of age, believe their marketing responsibilities have increased over the previous five years.

Whether an organisation rigidly follows the 70:20:10 approach, or its own blend of formal and informal training, the importance of a strong framework to recognise and embrace more subtle forms of training such as reverse-mentoring, and job-role shadowing is key for all ages.

Proportion of marketers who had received no training in past 2 years by age



CONCLUSION: IT IS TIME FOR A CO-ORDINATED APPROACH TO INDIVIDUAL NEEDS

If marketing is to be seen as a business-critical function in the boardroom it must ensure that its professionals are well-rounded, skilled, up-to-speed and speak the language of business, not just schooled in the latest digital techniques.

As we have shown, marketing remains a dynamic and vibrant industry, and over the course of an individual's career they are likely to cross a number of technological watersheds requiring them to reskill.

Providing effective training to support such inflection points is a challenge. Establishing best practice in cutting edge industry practices takes time, and practitioners that are capable of not only delivery but tutoring too.

That challenge however cannot excuse a reliance on pure "learning on the job", effective training should follow the 70:20:10 rule and should incorporate an element of formal training or clearly understood learning frameworks.

The concept of the ultra-skilled "digital native" has proven a persistent one since it was first conceived twenty years ago. In the period since has been updated to reflect a series of technological tipping points such as the rise of social media.

The response of the professional world under lockdown has been one of global resilience and adaptability. The concept of home working via digital technologies is now firmly embedded with all age groups, and this understanding of its benefits and pitfalls will likely trigger another shift in our industry.

To date, despite shifts towards hierarchy free flat structures, the junior, senior, executive hierarchy remains persistent in the provision of training. As we have shown, the pitfalls of this approach are a gradual loss of structure and independent assessment in favour of experience and informality.

The good news is that our research shows the ongoing value that professionals of all ages and seniority place on personal development. It is clear that as the profession faces into a post-COVID economy that a well-rounded capability, particularly in soft skills, is seen as a distinct advantage.

Our research finds that the majority of our profession believes that communication, leadership, teamwork, adaptability, the ability to work under pressure, social skills and a great many other "soft" skills have become more important in the last five years.

The issue of what constitutes "technological competence" is also important. This typically is ill-defined, with people reporting that they are good at social media but finding themselves failing on analytics when they do a test that applies structured criteria. Once again this is the symptom of an ill-defined, possibly even sprawling area in which people are too frequently asked to assess their own skills.

The division between technological and other quantifiable skills is an illusion as our research suggests professionals value a combination of each of them and see clear weaknesses in perceived gaps in others knowledge and capability.

There is an opportunity for digitally literate marketers to share a clearer picture of their strengths and needs with those that have preceded them into the profession. In turn this earlier generation not only accepts, but increasingly respects and perhaps envies their technological capability, recognising opportunities for not only corporate but personal growth.

Harnessing the opportunity for the effective cross generational exchange of skills requires academic rigour and a robust framework to support a widely recognised set of qualifications as part of a Continuing Professional Development (CPD) programme.

There is no question: now is the time to invest in independently structured and audited CPD schemes that cover the whole person rather than a preconception of that person's capabilities and needs based on lazy thinking.

We believe as the world begins another economic cycle, that organisations that reject generational stereotypes in favour of a culture of ongoing structured learning will provide the best opportunities for their teams and for themselves to succeed commercially.

FIVE KEY TAKEAWAYS FOR MARKETERS

1. Experience alone isn't enough. A strong development framework requires a blend of both formal and informal training. It's also important to consider more subtle forms of learning such as reverse-mentoring and job-role shadowing for people at all stages of their career.
2. Be careful not to get lost down a specialist rabbit warren. If you are to progress in your career you need to be more than just the person who is good with a particular digital skill.
3. Take comfort in the crowd. It seems we all, young and old, feel a bit overwhelmed by the online world. 71% of the marketers we spoke to said people younger than themselves were ahead in terms of digital marketing skills. This view was as common among under 30s as among over 50s.
4. Beware a disproportionate focus on digital skills - 60% of those we spoke to believe that a focus on digital skills comes at the expense of core marketing skills. This is felt significantly more keenly amongst 25-44 year olds than amongst those over 45.
5. Recognise the importance of training and development - There is strong recognition across the industry of the importance of training. Only 2% of people working in a marketing department felt training was important, this increases slightly to 7% among senior managers.

KEY TAKEAWAYS FOR DIRECTORS

1. You are responsible for developing the marketing leaders of the future. It is important to have specialist expertise in your team, but don't forget to ensure people are developing skills that will help them progress in their individual careers.
2. Learning and development is not just for the young. The research shows that the majority of formal training appears to be focused upon the incoming generation; only seven per cent of young people (aged 16-24) had received no training in the previous two years, increasing to 12% in the 25-34 age group. 74% of over-65s had received no extra training and 62% of the 55-64s. Given the dramatic change in the marketing landscape these figures are remarkable; consider whether you should be upskilling your more experienced team members.
3. Fill the right skills gaps. Interestingly, our research suggested that the biggest skills gap wasn't in digital skills and bigger issues were a lack of copywriting ability and data analysis. Carry out an audit of the skills in your team and use a competency framework to ensure you have every base covered.
4. Your team values development. The people most likely to think that training is not important were senior managers in marketing departments. If this is you, don't lose sight of the fact that the people you manage do place a high priority on continually learning.
5. Don't assume the 'digital natives' know everything. This report finds both a lack of confidence and significant knowledge gaps amongst the younger generation when it comes to digital marketing. It's important not to simply assume that because someone is young that they have an innate understanding of all things digital.

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