



Alterra Group

Thought Leadership Marketing for Professional Services

Professional Services Marketing in the Downturn

Initial Survey Results

May 2009

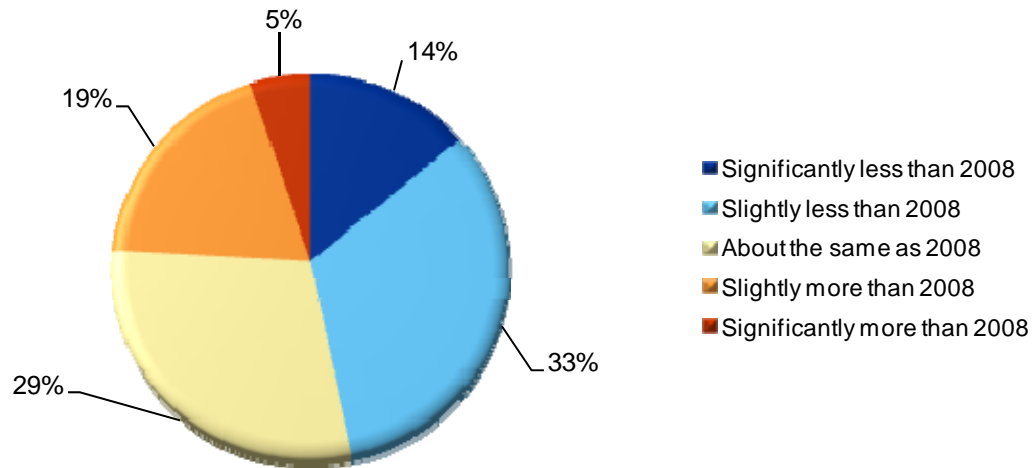


Survey Results Summary

- > Nearly half of respondents anticipate lower revenue in 2009, but almost one-quarter anticipate growth
 - Similar proportions report budget cuts (52%) vs. budget growth (22%)
 - The majority have not seen marketing layoffs
- > Lead generation was marketers' top goal in 2008, and remains so in 2009
 - However, thought leadership has increased in significance and brand-building has become less important
- > Marketers will pursue these goals primarily through direct marketing and written materials (collateral, POVs, and case studies)
 - The use of advertising has stagnated, and blogging has yet to become an important part of the mix
 - Advertising and blogging are also the only marketing vehicles significant portions of respondents plan to cut post-recession
- > Most respondents think the recession will end in the first half of 2010



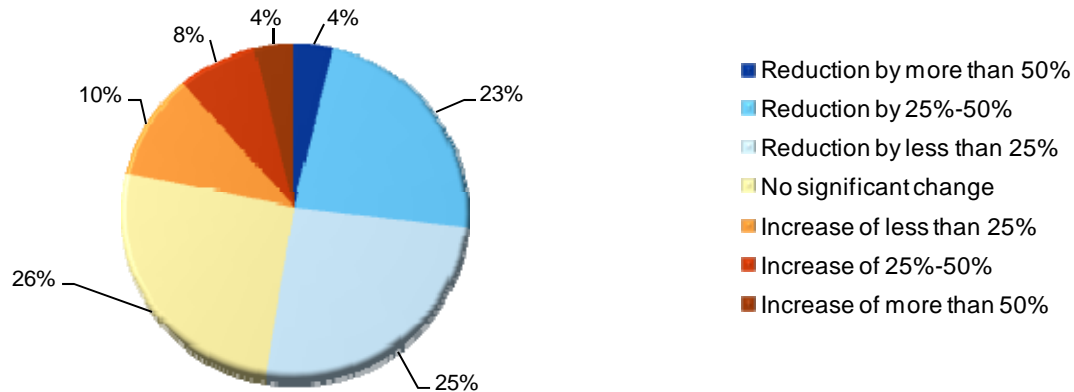
Projected 2009 Revenue



47% project less revenue, 29% say revenue will be steady, and 24% anticipate revenue growth



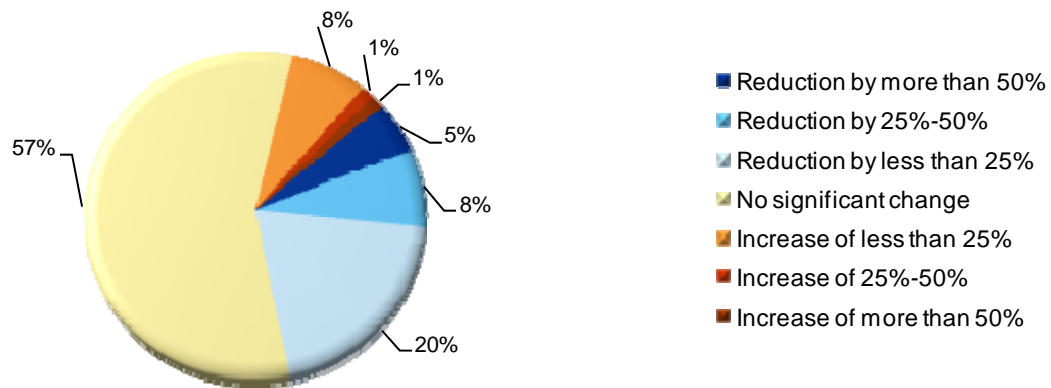
Marketing Budget, Past Six Months



52% have seen budget cuts, 26% have not had any changes, and 22% have larger budgets now than they did six months ago



Marketing Headcount

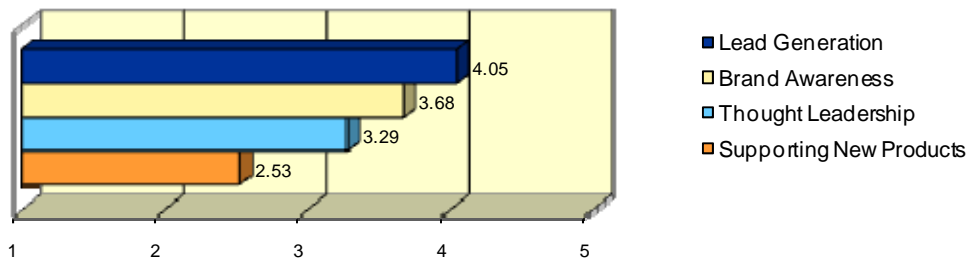


A slim majority have had no significant change in marketing headcount; 33% have seen layoffs, and 10% have seen growth



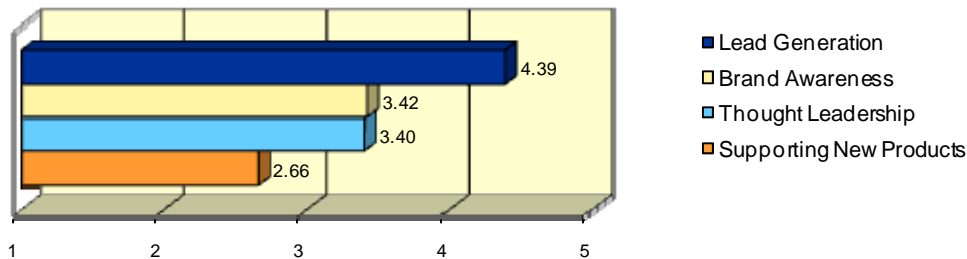
Marketing Priorities

2008 Marketing Priorities



Mean Scores: 5=Highest Priority, 1=Lowest Priority

2009 Marketing Priorities



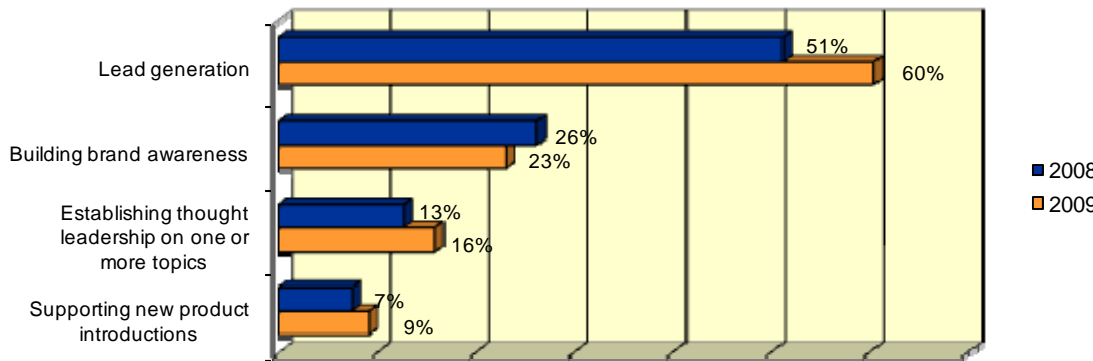
Mean Scores: 5=Highest Priority, 1=Lowest Priority

- > While the order of marketing priorities has not changed since 2008, their relative importance has evolved:
 - Lead generation has gained importance
 - Building brand awareness has become relatively less important, and thought leadership relatively more so



Single Highest Marketing Priority

Respondents Describing Each as "Highest Priority"

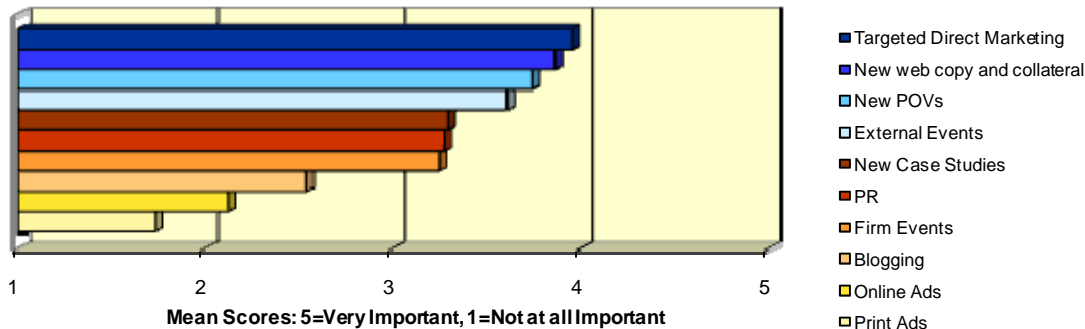


- > Similarly, 60% say lead generation is now their single highest priority, versus 51% in 2008
- > Building brand awareness remains the next-most common top priority, although it has lost ground since last year

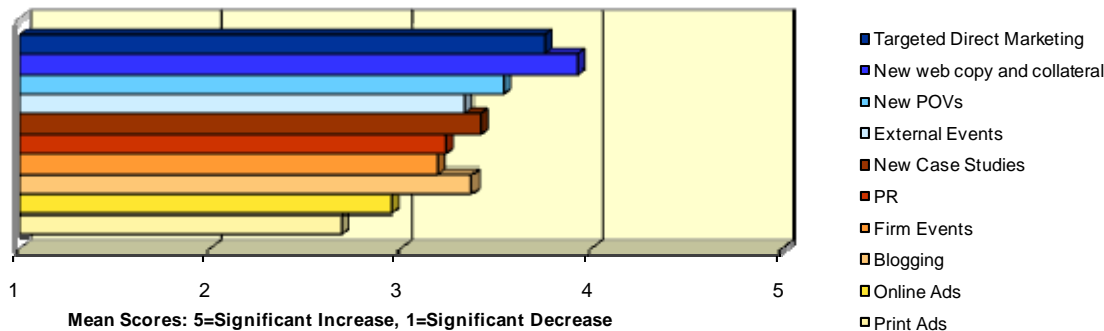


Marketing Vehicles

Current Importance



Change in Use in Past Year



> Targeted direct marketing and written materials are most important

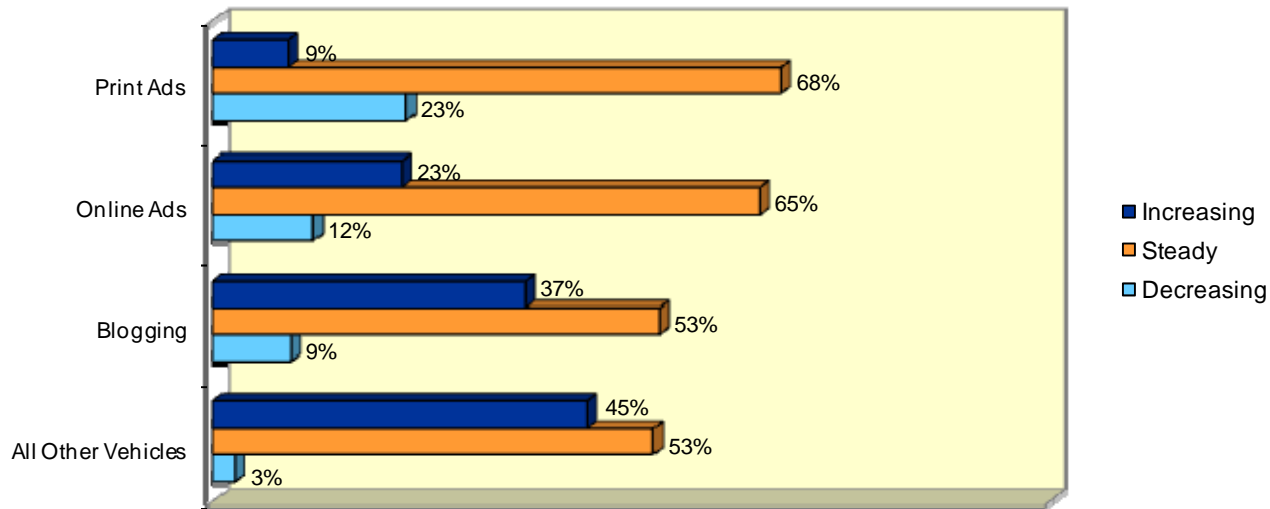
- These are also generally the vehicles respondents are using more of now

> Blogging has seen increased use, but remains the third-lowest priority

> Advertising is a low priority, and is not gaining significance



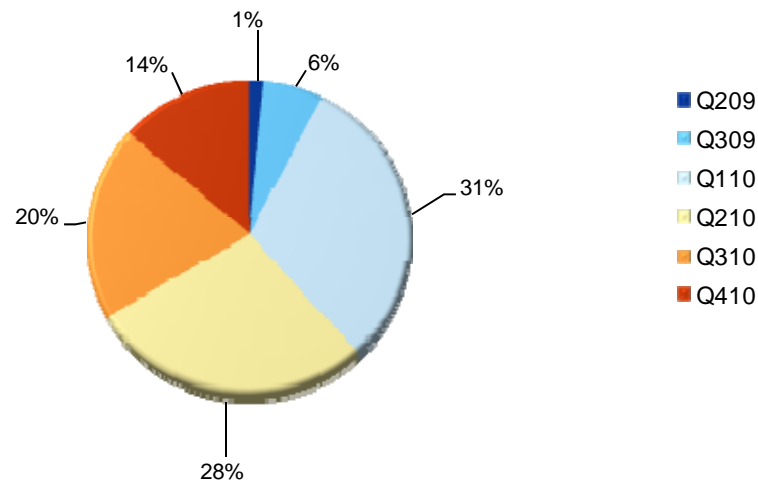
Anticipated Usage Post-Downturn



The vast majority of respondents plan on maintaining or increasing their use of all these vehicles after the downturn; however, more than 20% plan to cut print ads, and around 10% will cut online ads and blogging



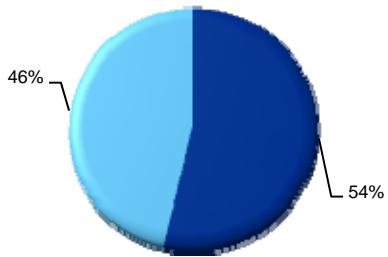
When do you predict the downturn will no longer affect your business?



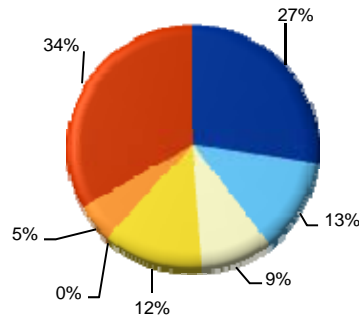
92% of respondents believe it will be 2010 before the recession will no longer affect business, and the majority believe reprieve will come during the first half of that year



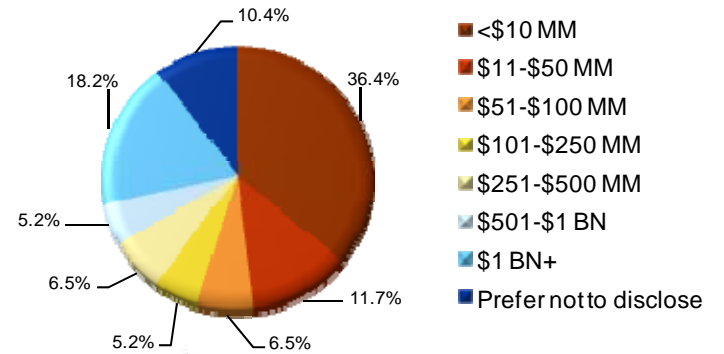
Demographics: Title, Industry, Size



- Marketing
- Sales/Business Development



- Management consulting
- Accounting
- Legal
- IT Services
- Association
- Corporate Training/Executive Education
- Other (please specify)





About the Research

- > This online survey was completed by 105 respondents in April 2009
- > To come: Full analysis, including comparison of companies that have maintained or grown revenue with those that have not



About Alterra Group

- > Alterra Group was founded specifically to help professional services organizations address their thought leadership marketing challenges. Our approach has three key elements:
 - [developing unique points of view](#),
 - [articulating those points of view](#), and
 - [building powerful marketing campaigns](#) around the content.
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