



# State of Industrial Sales & Marketing

*Putting Industry 4.0 into Practice 2nd Edition*

Showing the biggest opportunities in people, process and digital marketing technology to impact sales & marketing performance



# Foreword



**Michael Valos**  
Deakin University

Dr. Michael Valos is a Senior Lecturer in the Department of Marketing at Deakin University. Michael's academic research has focused on digital marketing and he has won a number of awards in international journals.

He regularly facilitates focus groups with leading Australian marketing executives and contributes regularly to CMO magazine. He led this study examining the industrial marketing sector which an under researched industry sector. The major purpose of the study was to explore drivers of successful customer experience, sales effectiveness, and sales forecasting.

The findings also address the impact of key performance drivers from the areas of organisational culture and processes, leveraging of data, developing successful business cases, and emerging technologies.

We believe this is a timely report for industrial marketers to succeed in a dynamic environment characterised by changing work practices, employee work preferences, skill gaps, supply chain challenges and rapidly evolving marketing technology including analytics, artificial intelligence and cloud services.

The quantitative findings are based on responses from 133 Australian industrial sector executives. Many thanks to Industrial Ideas and Salesforce.com who made this research possible. And thanks to the Deakin University research team including Victoria Harrison, Sachin Kalidas Mallar, Assoc Prof David Bednall, Dr Erica Riebe, Jon Buckmaster, Cianin Thomson, Kelsey Steele, Zahn Patuck and Nerieda Keenan.



**Peter Zafiris**  
Industrial Ideas

Peter Zafiris is an industrial marketer and the founder of Industrial Ideas - a marketing consulting agency dedicated to Australian industrial companies serving the manufacturing, construction, mining, oil, gas and energy sectors.

With over 20 years of experience, Peter has worked in the steel industry, leading national sales and marketing teams. Peter is proud to have commissioned this research study, with the academic rigour of Dr. Michael Valos from Deakin University and the industrial sales and marketing expertise of Nick Gill from Salesforce.

Forecasting sales accurately, improving customer experience, achieving sales effectiveness, and implementing sales and marketing technology - were identified as the key success factors from our survey respondents. We explore these factors further in the study to provide some key insights and recommendations.

In a year driven by COVID lockdowns that have had a noticeable effect on market demand this study aims to uncover some truths about industrial sales and marketing in Australia.

We look forward to connecting with you in the near future, with the support of Deakin University and Salesforce.



**Nick Gill**  
Salesforce

Nick Gill is the Australian Regional Vice President, Manufacturing & Automotive for Salesforce.com.

Nick is a 20-year veteran of the technology industry having spent time at multiple internet start-ups and many global software companies such as Adobe and Google. Nick's roles have seen him at the forefront of enterprise software in periods of rapid growth and change, fueled by major shifts in the technology landscape - the emergence of cloud computing, customer experience and the dot com era. Nick has worked across a broad range of industry sectors including Manufacturing, Automotive, Retail, Consumer Goods, Travel, Media, Utilities and Telecommunications.

Nick and the Salesforce team in Australia are proud to have sponsored the State of Industrial Sales and Marketing Research Study in 2021, partnering with Deakin University and Industrial Ideas.

# Study Aims and Focus

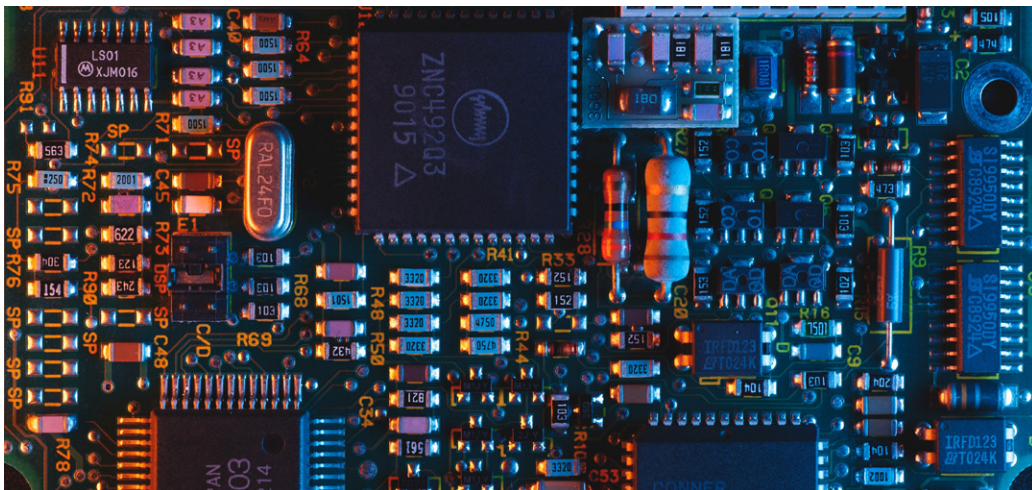
We believe it is critical to find rigorous evidence that sheds light on the key drivers of sales service and marketing success as a means of achieving competitive advantage. We defined marketing performance in this study as a mix of customer retention and customer acquisition. By providing consistent high-quality CX across all channels, your existing customers rebuy and generate positive word-of-mouth to facilitate your outreach and acquisition strategy. Further we wanted to understand the drivers of sales forecasting accuracy as we predict ongoing supply chain and global market disruption.

The study was able to compare using regression analysis and quantitative data collection the key drivers of CX, sales effectiveness and sales forecasting effectiveness.

The study looked more broadly at overall marketing performance by considering the key drivers from areas such as organisational culture and cross-functional characteristics, leveraging of data, and developing successful business cases.

In summary we believe this is the first quantitative Australian study to examine contemporary industrial marketing practices and quantify their impact on performance. The study provides clear keys are executives to focus their efforts in achieving CX, sales effectiveness, sales forecasting and marketing performance are generally.

Executives we spoke to indicate the industrial and manufacturing sectors are often constrained by legacy systems and traditional practices. Sectors such as financial services appear to be adopting agile work practices, social channels, and other forms of marketing technology ahead of this sector which is just starting to change habitual approaches to marketing.



“This report highlights the pressing need for marketing leaders to focus on customer experience the same way a hotel worries about its lobby and concierge. Owned and first-party assets like a website need personalisation and marketing science to welcome guests and direct them with care to the products and services that are right for them.”

Jeremy Brook  
Entrepreneur in Residence  
AGL

# Methodology and Sample

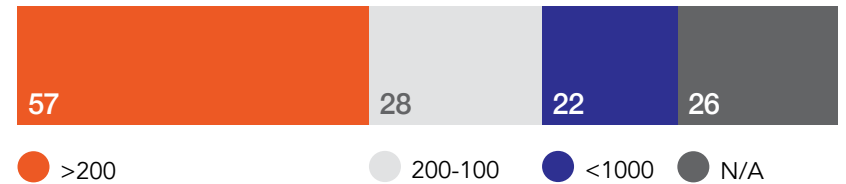
The quantitative findings are based on 133 industrial sector respondents. They completed a 12-minute online survey hosted at Deakin University between July and September 2021. The figure below provides an overview of the sample characteristics in terms of respondent and organisation.

In addition to the quantitative data collection, a number of interviews were undertaken in June, to design the survey and others were undertaken in October to help clarify the findings the quantitative findings.

Job Titles of Respondents 133 Total



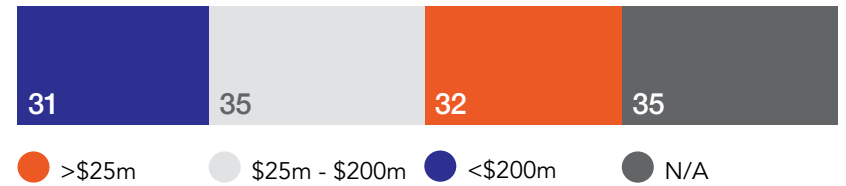
Organisation Size by Employees 133 Total



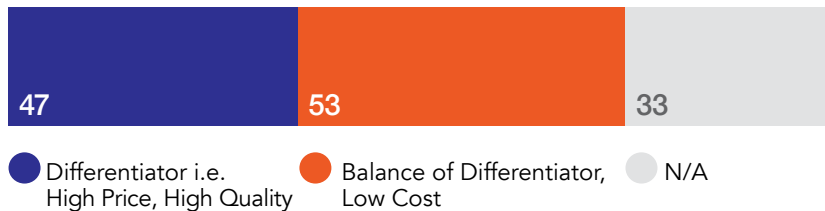
Industry Sector Represented 133 Total



Organisation Size by Revenue 133 Total

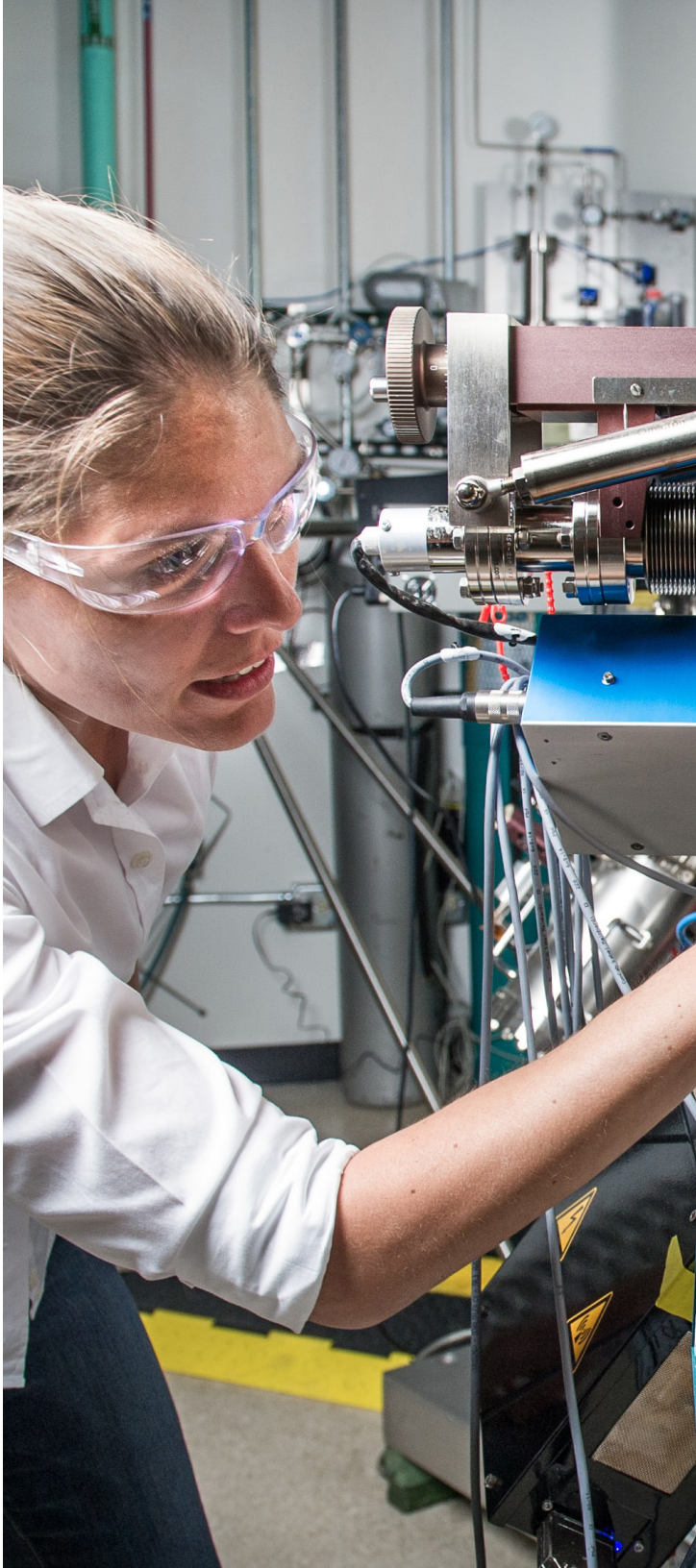


Business Strategies of Respondent Companies 133 Total



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# Executive Summary

As mentioned earlier, this is an Australian quantitative study of the industrial sales and marketing sector which is under-researched both in Australia and throughout the world. The study is timely considering: the changing nature of work and job skills, likely continued global supply chain disruption and rapidly evolving marketing technologies that have the potential to facilitate competitive advantage. Unlike other studies, the use of regression analysis highlighted specific solutions and key drivers of performance in areas such as CX, sales effectiveness and sales forecasting performance. Likewise, we study the key drivers of overall marketing performance in the areas of organisational culture and process, leveraging data, emerging technologies, and developing marketing business cases. Using quantitative data from hundred and 33 senior executives we found:

1. Superior CX performance is driven by cross-functional support, access to talent and skills and achieving consistent CX quality across channels
2. Cross-functional support, access to talent and skills and cutting-edge sales technology are keys to sales effectiveness performance
3. Sophisticated forecasting analytics, cross-functional support and access to talent and skills are keys to sales forecasting performance
4. The key driver to overall marketing performance in terms of organisational culture and processes is support from operations
5. The key drivers of successfully leveraging data to achieve overall marketing performance are  
5a. the prevailing belief that "data is key to business success"; and  
5b. organisation's website is highly personalised
6. There are three key aspects of technology business cases that lead to overall marketing performance. These are:  
6a. sales and marketing collaboration in developing the business case,  
6b. ability to quantify impacts of the technology on sales and marketing competitive advantage; and  
6c. ability to accurately estimate the risks within the business case
7. Of the 10 emerging technologies examined both cloud computing and customer engagement through social channels were most commonly linked to higher overall marketing performance.

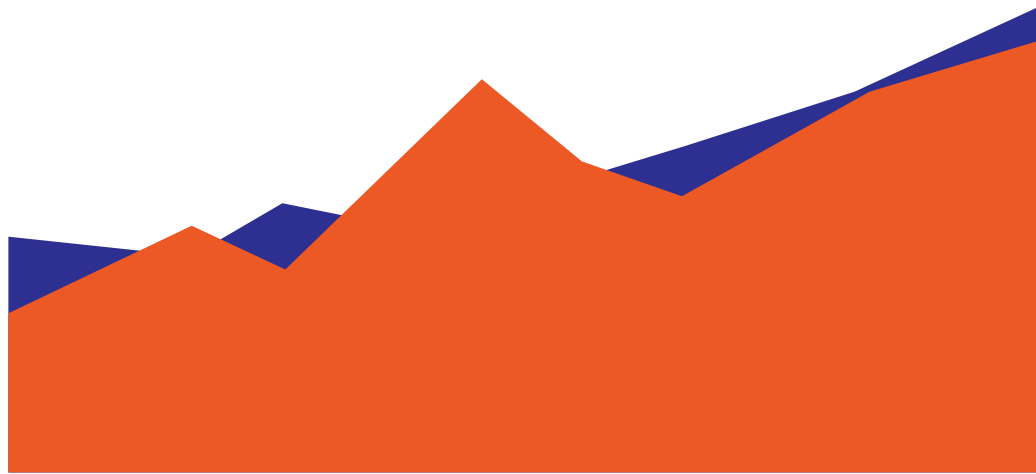
# 2020 to 2021 Trends

When comparing the 2021 data with the 2020 report a few things are apparent.

1. Last year's study showed sales forecasting accuracy and customer experience were the top two challenges. The 2021 data provides specific actionable suggestions based on empirical data to increase performance.
2. The 2020 report highlighted the difficulty industrial marketers are having to attract talent. Financial services and FMCG also face these challenges but not to the extent of the industrial marketing sector. It appears apparent that 'freshly minted' graduates and early career marketers and millennial employees are seeking flexible work practices, sophisticated modern technology and perceived industrial marketing to be bound by legacy systems and traditional mindsets. This study provides data to show the link between attracting marketing skills and marketing performance.

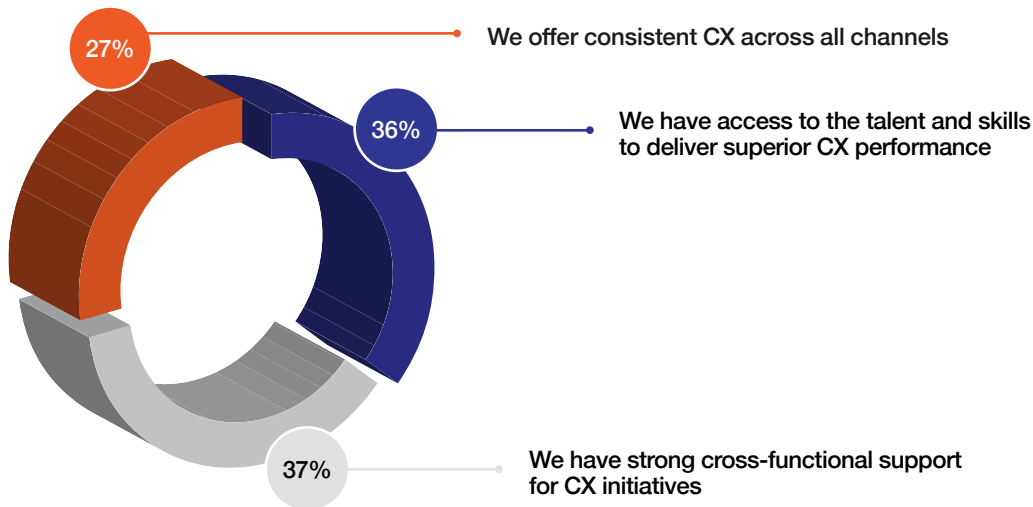
Increasing employee expectations regarding flexible work arrangements will put pressure on manufacturing companies to digitise in order to attract the best employees from wider geographic and demographic catchments. If manufacturers are rigid and only "physical office only" they will lose the 'war on talent' to other more flexible industry sectors.

3. In terms of emerging technologies AI machine learning has been adopted by 25% of industrial marketing companies when in 2020 only 20% said they were likely to adopt it in the future, while in 2020 65% of respondents were already on the cloud 80% are on the cloud in 2021.



# Drivers of customer experience (CX) success

The quantitative regression analysis identified the three key drivers of CX performance from the seven being tested. We believe this provides evidence to industrial marketers that in 2021 these are the key actions to achieve CX success. Managers need to ensure these are being achieved: 'offering a consistent CX experience across all the channels', 'strong cross-functional support for CX', and 'having the talent and skills to deliver superior CX'. It would appear having an appropriate culture where sales and marketing are not isolated from the rest of the organisation and winning the war on talent are major drivers of CX success. The relationship between the other variables was not strong enough to provide statistical evidence.



**“The reason only 25% of executives strongly agree may be that some departments are still siloed as a business without a customer centric or 360 view. Manufacturing companies such as ours have tended to be ERP and product centric and as such some departments not attuned to the customer’s needs.”**

Rob Sutton, Commercial Director - Sutton Tools

## Average Score of Responses

The following table summarises the overall responses in terms of providing a mean score. While not showing a relationship to marketing performance in the way a regression analysis can, it describes where organisations are at, in terms of beliefs and actions. It would appear respondents don't appear to be giving strong support to a lot of the characteristics normally associated with CX performance. While I believe digital engagement allows contact at scale they don't believe the technology they currently use for CX is cutting-edge. There is not great variance in the responses with not a lot of high or low-performance characteristics.

Digital engagement allows us to connect with large numbers of customers efficiently at scale	6.4
We have access to the talent and skills to deliver superior CX performance.	5.8
We offer consistent CX across all channels	5.5
We have strong cross-functional support for CX initiatives	5.5
We have a robust measurement framework to effectively track the value of our CX efforts	4.9
Our customer journey mapping is comprehensive	4.8
The technology we use to provide CX is cutting-edge	4.8



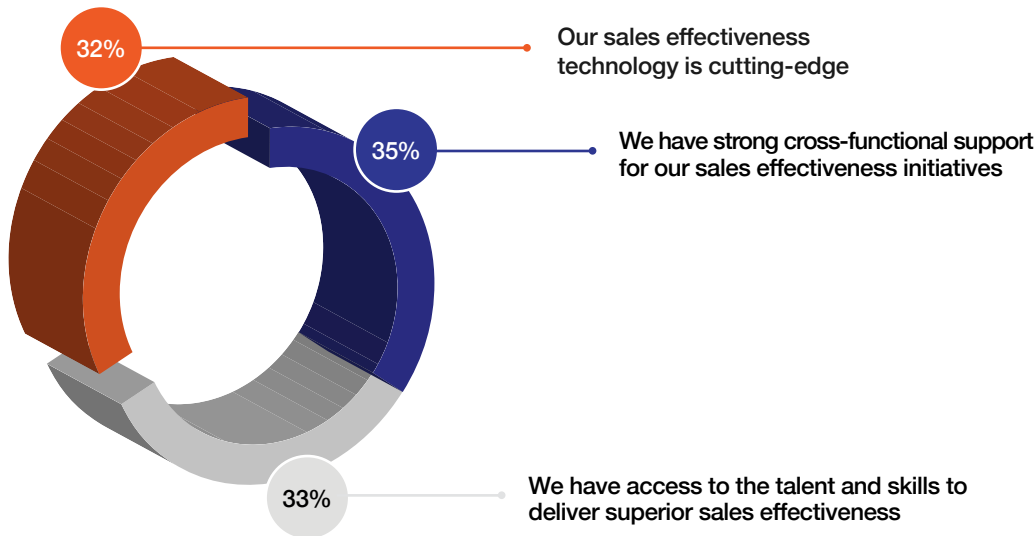
**Only 25% of executives strongly agree that they have strong cross-functional support for CX, yet it is the key CX performance driver.**

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# Drivers of sales effectiveness success

We noted similarities in the results of the regression analysis between the drivers of sales effectiveness success and CX. Both 'strong cross-functional support' and 'accessing talent and skills' of employees were key to successful sales effectiveness. Interestingly the 'measurement framework' was not statistically related to either CX or sales effectiveness performance. However, in contrast to the CX data sales and marketing technology had a strong demonstrably impact on sales effectiveness. i.e. "Our sales effectiveness technologies cutting-edge". It seems vitally important to have technology that can capture prospects and help understand them as the organisation manages them through the sales conversion pipeline. A clear link between advanced technology and the bottom line.



## Average Score of Responses

The following table summarises the overall responses in terms of providing a mean score. The data shows people aspects such as cultural support and employee skills are positive but adoption of cutting-edge sales effective technology appears to be lacking.

We have access to the talent and skills to deliver superior sales effectiveness.	6.1
We have strong cross-functional support for our sales effectiveness initiatives.	5.9
We have a robust measurement framework to effectively measure the value of our sales effectiveness efforts.	5.5
Our sales effectiveness technology is cutting-edge.	5.0

**“Unfortunately, too many organisations are still struggling with the adoption and utilisation of their CRM platforms. Despite claiming to appreciate its importance, they neglect to focus on the change management dimensions and, as a result, their teams come to regard their CRMs as management policing tools not sales, marketing and service productivity platforms.**

**Organizations often rush into purchasing sophisticated and complex technologies based on their perceived needs, thinking it will result in marketing success and solve their issues. They neglect to think enough about how these tools will actually help them achieve their business KPIs. Not enough consideration is given to the strategy and resources it takes to efficiently and effectively leverage the functional capabilities.”**

Tom Goodwin,  
Associate Director  
Global Marketing Operations, Analytics & e-Commerce  
Ansell

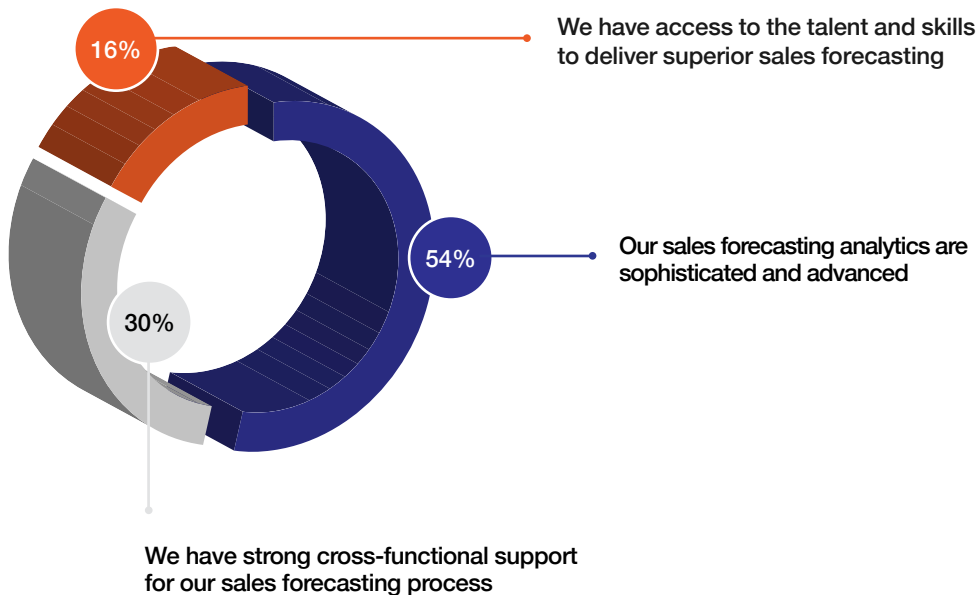


Only 18% of executives strongly agree that their sales technology is cutting-edge, yet it is one of the key sales performance drivers.

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# Drivers of sales forecasting success

Once again there were similarities between the drivers of these three aspects of successful sales forecasting. The analysis found that two of the five drivers being tested were statistically significant and one driver approached being statistically correlated to forecasting success. The similarities were shown with a demonstrable relationship between 'strong cross-functional support' and 'sales forecasting success'. It appears likely also that 'access to talent and skills' (which approached statistical significance) is an important building block. But when looking for the strongest determinant of sales forecasting success it may not be a surprise but use of "sophisticated and advanced analytics" came out the strongest. More sophisticated analytics and manipulation of big data in conjunction with artificial intelligence should be looked on as an opportunity to enhance marketing performance. More so than for any other marketing performance measure its role is major for sales forecasting. With increasingly unpredictable and unstable supply chains and global geopolitical instability, our results highlight the keys to successful sales forecasting.



## Average Score of Responses

The following table summarises the overall executive responses in terms of providing the mean score for each question. The findings show a moderately positive outcome for accessing employees skilled in sales forecasting. But in terms of technology, less than half the sample believe their sales forecasting analytics are sophisticated and advanced.

We have access to the talent and skills to deliver superior sales forecasting.	5.8
Our sales forecasting data is easily accessible.	5.7
Our sales forecasting data is easily understandable.	5.7
We have strong cross-functional support for our sales forecasting process.	5.6
Our sales forecasting analytics are sophisticated and advanced.	4.9

**“Sales forecasting remains both part science and part art. The science part i.e. applying analytics to historical data is something that most companies can get to. However the world keeps changing and this is where ‘art’ of forecasting comes in; the most sophisticated forward forecasting work requires artificial intelligence and that is something most companies have not yet managed to master.”**

Erik Zimmerman  
Chief Executive Officer  
Sitetech Solutions

Only 17% of executives strongly agree that their sales forecasting analytics are sophisticated and advanced yet that is the key driver of sales forecasting success.

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# Organisational culture and cross functional relationships characteristics that underpin sales and marketing success

Surprisingly, from the section of the survey addressing organisational, cultural and cross-functional relationships only one independent driver was statistically related to overall marketing performance. The key role of the operations function in supporting marketing and sales initiatives is shown in the table below. This finding provides a clear focus for industrial marketers to address this issue. While we are not suggesting industrial marketers ignore other functions such as finance and IT these were not statistically shown up as strongly as relationships with the operation function so this is where we suggest marketers put their efforts.

Only 40% strongly agree that their operational function provides strong support to marketing and sales yet it is **THE** biggest organisational driver of marketing success.

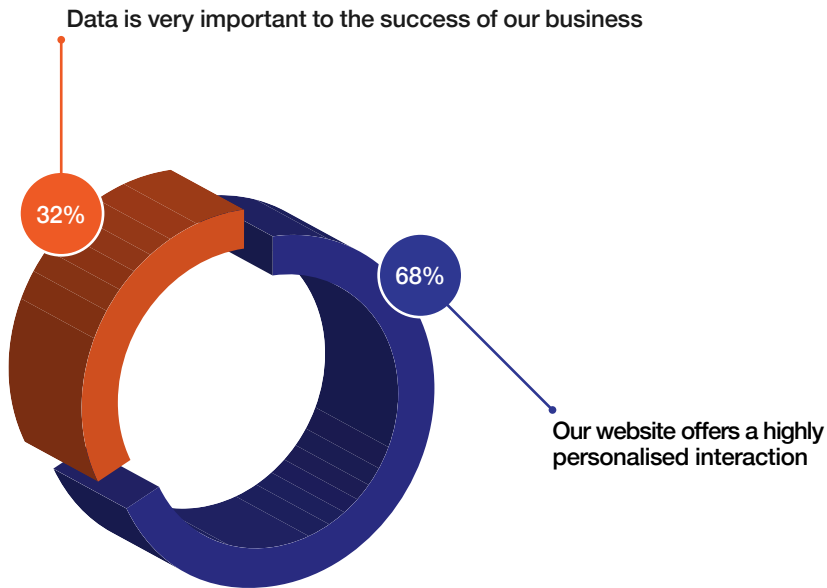
## Average Score of Responses

The following table summarises the overall responses in terms of providing a mean score. While not showing a relationship to marketing performance in the way a regression analysis can, it describes where organisations are at in terms of beliefs and actions. It would appear relationships and culture are predominantly positive but organisations are falling with the ability for information technology to provide cutting-edge support for marketing technology. While innovation and adaptation don't come out strongly, internal cooperation is more positive.



# Impact of ability to leverage data on marketing success

The critical and major role of a highly functional and personalised website experience is highlighted in the section of survey questions addressing the role of data. Data underpins personalisation, and the results demonstrate clearly that “data is very important to the success of our business”.



A regression analysis was performed with data from 110 respondents (not all respondents completed each question) with the following survey questions used as independent variables with the dependent variable being marketing performance i.e.. (Composite variable weighted 70% on customer retention and 30% on customer acquisition).

## Average Score of Responses

While three quarters of respondents considered data to be very important to success, less than half obtain a '360 customer view' using data. This suggests respondents are yet to fully implement their belief in the importance of data. In terms of the accessibility accuracy and comprehensive criteria of data respondents use for marketing sales decision-making, the sample is only slightly positive. Succeeding with personalisation still seems a challenge with less than half the sample considering their website campaigns are personalised.

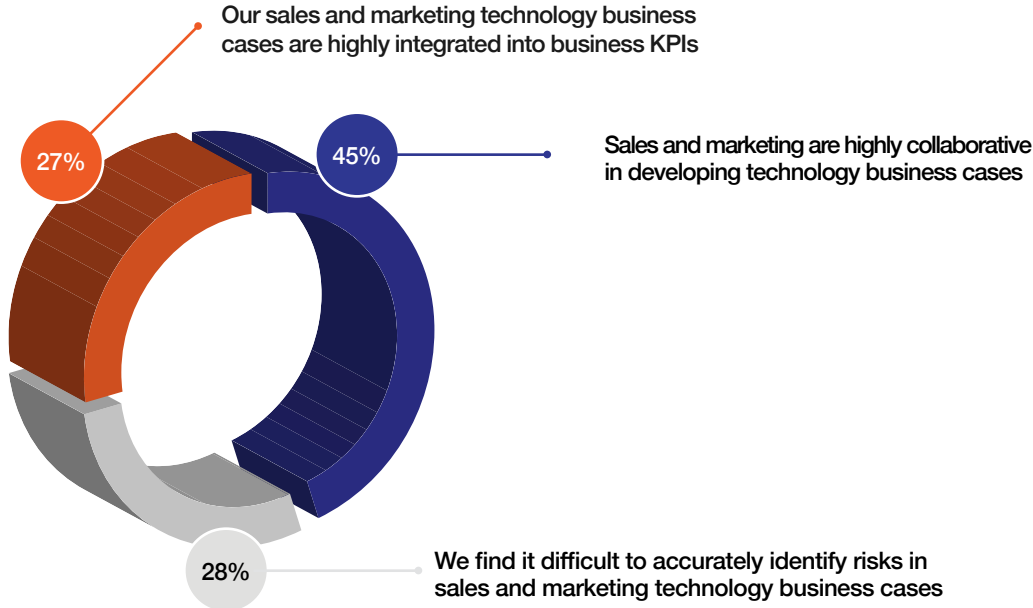
Data is very important to the success of our business	7.4
The data upon which marketing and sales initiatives are based is accurate	5.9
Marketing and sales have access to all relevant customer data in an easy-to-use form	5.3
The data required by marketing and sales are easily accessible	5.3
Marketing and sales have access to all relevant campaign reporting and performance data in easy-to-use form	5.0
To successfully use sales and marketing technology we need to rely heavily on outsourced support and resources	4.9
Our digital marketing campaigns are highly personalised	4.6
Our website offers a highly personalised interaction	4.6
Our data provides a 360-degree view of customers	4.4
Fears of maintaining customer data privacy are a barrier to implementing digital marketing	4.3

**“The lack of website personalisation is like running a hotel by leaving some room keys near the front door and hoping that guests find the right one for their room.”**

Jeremy Brook  
Entrepreneur in Residence  
AGL

# Impact of ability to prepare successful business cases on marketing success

It is exceedingly clear that the collaboration between sales and marketing are critical to successful business cases that impact marketing performance. Business cases must address the difficulty in identifying and quantifying risks, however success in terms of business performance occurs when the business case can be highly integrated into business KPIs rather than be isolated from the broader business.

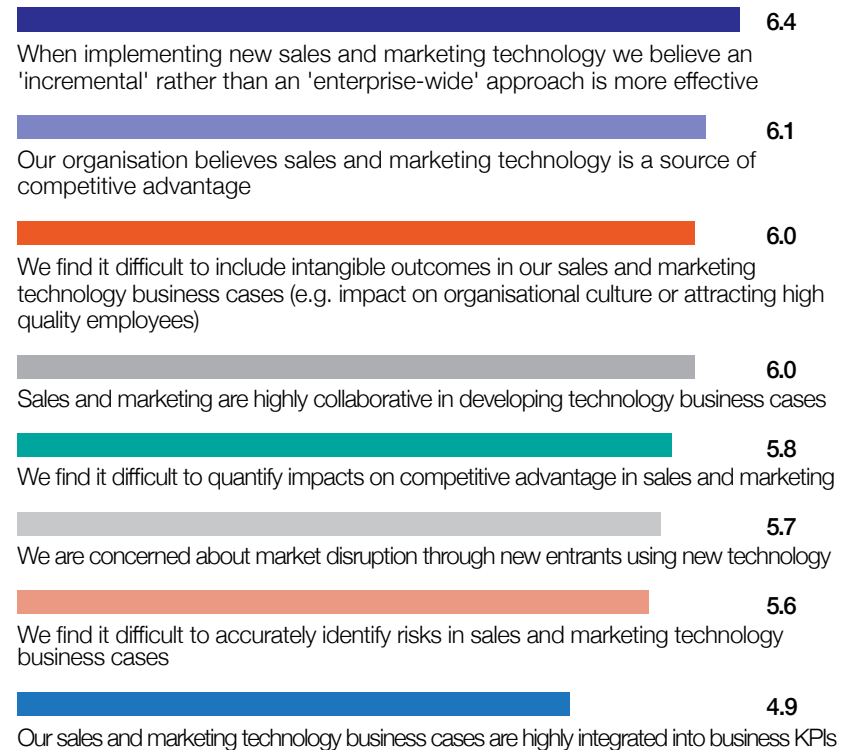


A regression analysis was performed with data from 110 respondents (not all respondents completed each question) with the following survey questions used as independent variables with marketing performance (weighted 70% on customer retention and 30% on customer acquisition) as the dependent variable.

## Average Score of Responses

The majority of respondents are taking an incremental approach rather than enterprise-wide approach to adopting sales and marketing technology. This would appear to be a more risk averse approach when facing scrutiny from other C-Suite executives.

While a co-operative culture exists between marketing and sales in terms of developing business cases, most organisations place the major difficulty of quantifying tangible and intangible outcomes. Approximately half the respondents can't integrate technology business cases with business KPI's. This suggests that either the organisation doesn't see the potential of sales and marketing technology or marketers are too optimistic about the potential of technology and that measurement is not important. Further, the majority of respondents see significant difficulties in identifying risks and clarify impacts within business cases.



**“Too many times organizations rush into purchasing technologies based on their capabilities, thinking it will result in marketing success and solve all of their issues. They neglect to think about how it will help to achieve business KPIs or the strategy and resources it takes to leverage technology to its full capability.”**

Tom Goodwin,  
Associate Director  
Global Marketing Operations, Analytics & e-Commerce  
Ansell





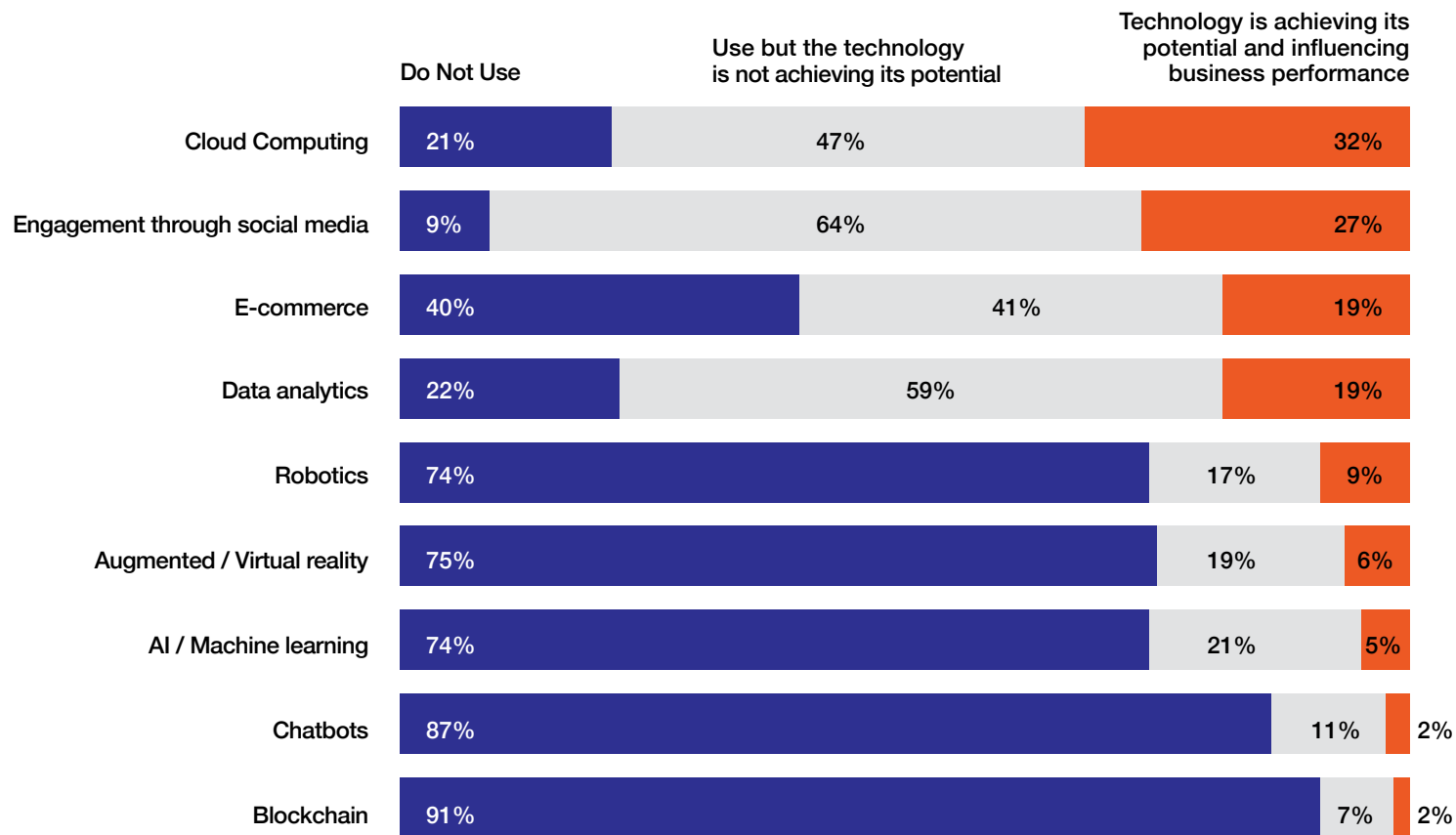
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**Only 18% of executives strongly agree that their technology business cases are highly integrated into business KPIs yet it is one of the three business case characteristics related to overall marketing success.**

# Leveraging emerging technologies to their full potential

Cloud computing and engagement with social channels are the most common contributors to business performance. Technologies such as cloud computing engagement through social media e-commerce and data analytics are in wide use and yet industrial marketers are struggling to achieve their full potential.

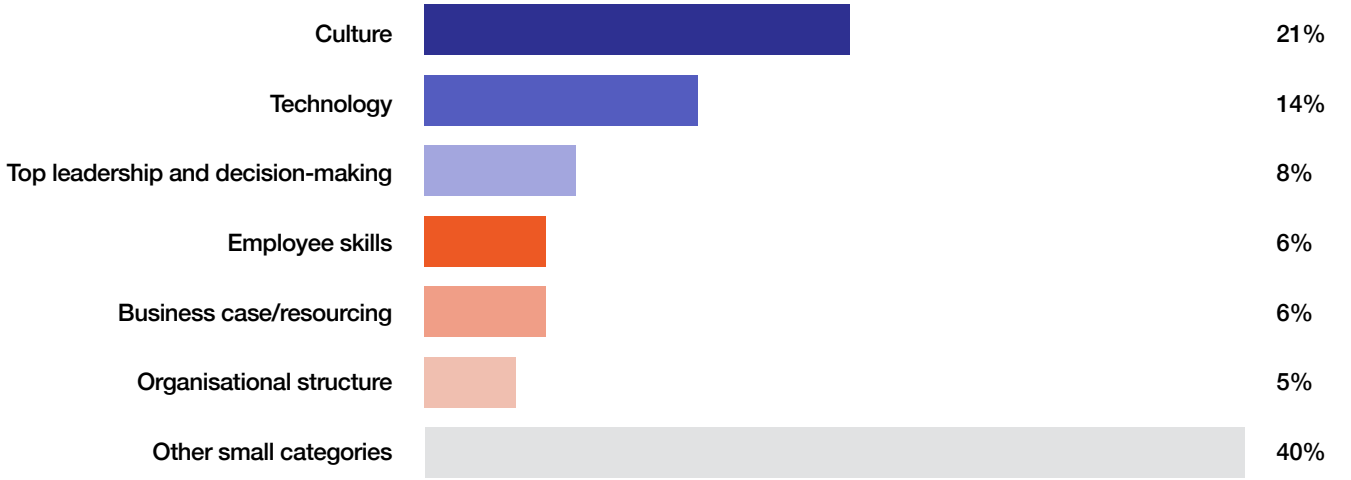


# Biggest challenge to flexibility and being adaptive

The study had a single open-ended question addressing the major challenge of agility and flexibility in organisations. A critical area with change occurring through pandemic, digital disruption, changing workforce and work preferences. The table below shows the responses according to themes represented by respondents.

As shown earlier in the study the operational support to sales and marketing initiatives is the biggest of the organisational drivers of marketing success. Industrial companies must focus on operations to extract

the full potential cloud solutions etc. Too many times new technologies are implemented but business and systems surrounding the new technology still operates the same traditional (i.e. non-agile) manner and ROI is much lower than expected. Relative to other sectors it is apparent manufacturers tend to be more set in their ways as far as processes are concerned



# Conclusion

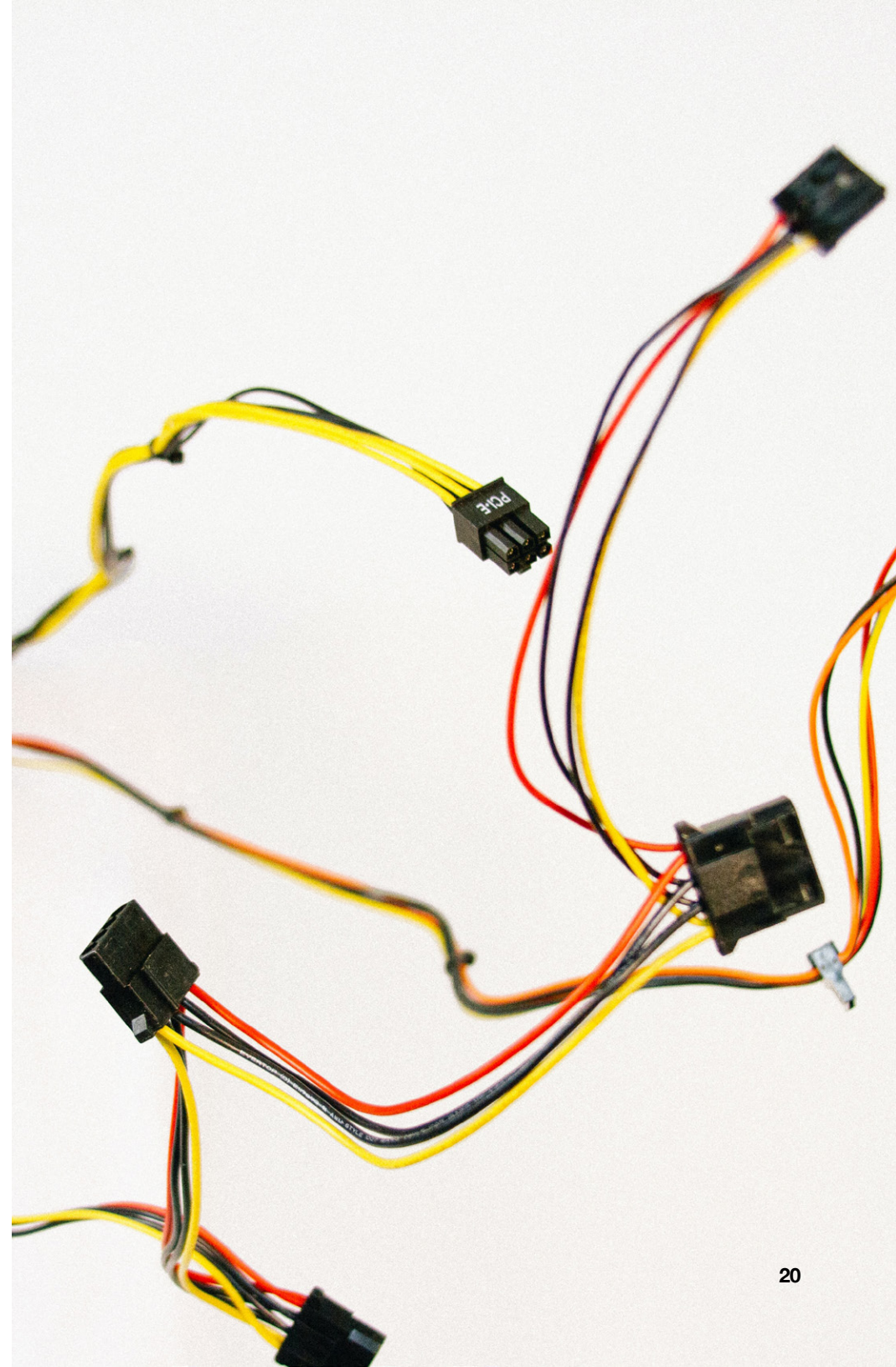
As shown earlier in the study the operational support to sales and marketing initiatives is the biggest of the organisational drivers of marketing success. Industrial companies must focus on operations to extract the full potential cloud solutions etc . Too many times new technologies are implemented but business and systems surrounding the new technology still operate in the same traditional (i.e. non-agile) manner and ROI is much lower than expected. Relative to other sectors it is apparent manufacturers tend to be more set in their ways as far as processes are concerned.

For Australian industrial marketers the study provides contemporary localised findings that allow them to do two things:

Firstly, it allows them to benchmark themselves in terms of summarised responses to each of the individual questions, to compare themselves to what other industrial sector executives and their companies are either thinking or doing. This might prove the motivation to make changes to address the key drivers linked to CX, sales effectiveness, sales forecasting success or overall marketing success.

Secondly, the regression analysis helps managers identify from anecdotes or alternative explanations, the small number of evidence-based key drivers of CX, sales effectiveness, sales forecasting success or overall marketing success. Thus, they can allocate time and resources effectively.

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# Thank You to Our Thought Leadership Panel



## Imran Khan

Imran is presently leading the industry sales teams for FMCG and Retail for Salesforce Australia. Imran's passion for enabling customer growth and delivering win-win business partnerships remains the cornerstone for his business success. Imran has supported the design and execution of this research study.

Imran and the Salesforce team in Australia are proud to have been involved in the research study, sponsoring the State of Industrial Sales & Marketing research study in 2021, partnering with Deakin University and Industrial Ideas.



## Stephanie Baraya

Stephanie is leading the marketing initiatives, Manufacturing for Salesforce at present. She is a big picture thinker who is passionate about creating growth opportunities for customers, creating inspiring innovations and leveraging important research to best aid the customers. Her strength in building and nurturing relationships has been a pillar for the success of her work to date.

Stephanie and the Salesforce team in Australia are proud to have been involved in the research study, sponsoring the State of Industrial Sales & Marketing research study in 2021, partnering with Deakin University and Industrial Ideas.



## Danielle Michael

Danielle is part of the industry marketing team for Retail, Consumer Goods and Manufacturing at Salesforce Australia. Danielle has a history of working in the data, software and e-commerce industry. Skilled in Lead Generation, Copy Writing, Campaign Management, and Marketing Strategy, Danielle has supported the development of this research study.

Danielle and the Salesforce team in Australia are proud to have been involved in the research study, sponsoring the State of Industrial Sales & Marketing research study in 2021, partnering with Deakin University and Industrial Ideas.



## Paul Davenport

As principal of Summit Connect, Paul has a strong background in the development, implementation and embedding of sales and customer engagement programs. With extensive success in supporting businesses to drive higher performance, Summit Connect provides frameworks, processes and software to enable its clients to improve sustained revenue and profitability growth.

Paul is proud to have been involved in the State of Sales & Marketing research study since its inception, providing support in the key areas of sales process and effectiveness.



## Tony Hall

Tony is committed to changing the perception of 'sales' through enabling salespeople and their managers to deliver real value to their clients. Developing the right behaviours to create good habits. Think Beyond helps B2B companies transform the way they approach their targets, prospects and clients to drive growth. They are a Salesforce ISV and Consulting Partner with three B2B Sales Apps available on the Salesforce AppExchange.

Tony and the Think Beyond team are proud to have been involved in the State of Industrial Sales & Marketing research study, providing support on the key areas of sales effectiveness.



## Designed by Jonathan Buckmaster

Jonathan is a freelance graphic designer, and has built an array of experience delivering design solutions in the academic, telecommunications and fashion sectors. He enjoys a creative challenge and brings a detailed eye to his work, delivering high-end results.

Jon is contactable for enquiries via:

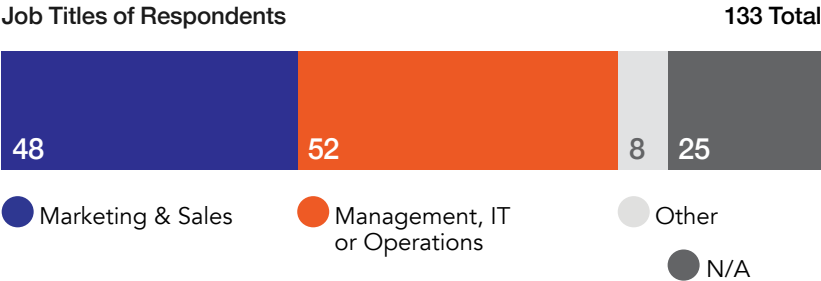
Email: [jonbuckmaster@gmail.com](mailto:jonbuckmaster@gmail.com)  
Mobile: 0417 300 514  
Instagram: [@graphic.jb](https://www.instagram.com/graphic.jb)  
Behance: <http://be.net/jonathabuckmas>

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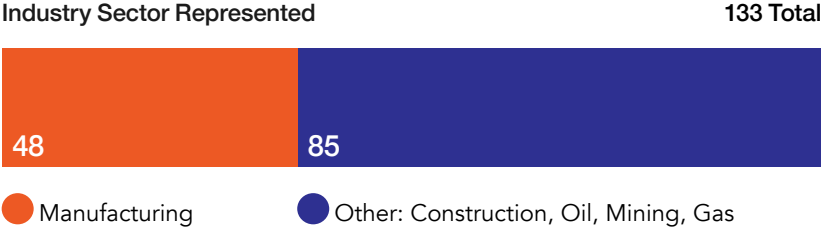
# Respondent Job Titles

Job Title	Percentage	Frequency
Marketing and/or Sales	36%	48
Management IT or operations	39%	52
Other	6%	8
N/A	19%	25
<b>Total</b>	<b>100%</b>	<b>133</b>



# Industry Sector Represented

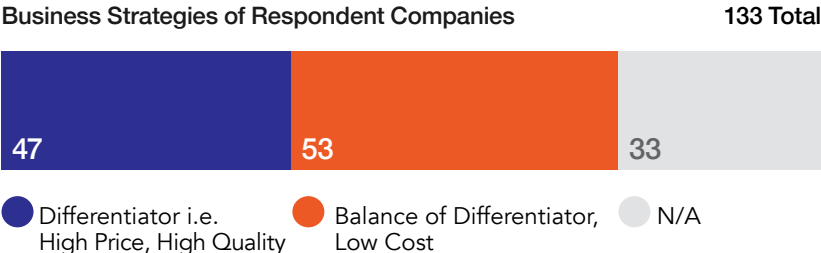
Industrial Marketing Sector	Percentage	Frequency
Manufacturing	36%	48
Other i.e. Construction, Mining, Oil, Gas etc.	64%	85
<b>Total</b>	<b>100%</b>	<b>133</b>





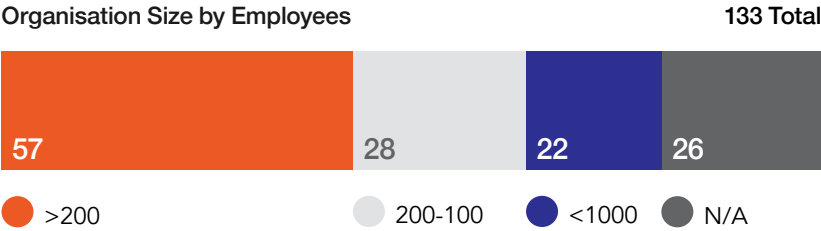
# Business strategies of respondent companies

Business Strategy	Percentage	Frequency
Differentiator i.e. - High Price High Quality	35%	47
Balance of Differentiator Low Cost	40%	53
N/A	25%	33
<b>Total</b>	<b>100%</b>	<b>133</b>



# Organisation size by employees

Number of Employees	Percentage	Frequency
Under 200	43%	57
200-1000	21%	28
More than 1000	16%	22
N/A	20%	26
<b>Total</b>	<b>100%</b>	<b>133</b>



# Organisation size by revenue

Revenue	Percentage	Frequency
Under \$25m	23%	31
More than \$25m less \$200m	26%	35
\$200m or more	24%	32
N/A	27%	35
<b>Total</b>	<b>100%</b>	<b>133</b>

