# Marketing and communication in Belgian companies: past, present and future

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## Introduction

Marketing is an important function in companies. Research in technology-driven start-ups, for instance, shows that marketing expertise and the involvement of marketing experts is the single most important variable that sets apart the success stories from the failures. And although we are inclined to think that, as a result of the fact that marketing is part of the curriculum of most business schools now, it is evident that the importance of marketing is recognized by everyone, the high failure rate of new business ventures suggests the opposite. Marketing activities in companies can be divided into two broad categories. Strategic marketing implies taking decisions about segmenting markets, the selection of target groups, and the definition of a strategic positioning for the company's products. Tactical marketing relates to the composition of a consistent and synergetic marketing mix, implying product, price, distribution and communication decisions. All these decisions can – or should – be supported by marketing research, and can be performed by the company itself and/or by external consultants, working in close cooperation with the company's marketing professionals or other companies with which the company joins forces (e.g. co-branding).

This paper explores the direction in which these marketing functions evolve in Belgian companies, and tries to give an indicative answer to the following questions:

- To what extent do Belgian marketers attach importance to the various marketing tasks and functions and how does this reflect in the number of people working in these functions ?
- How has this evolved during the past years, and how do they foresee this to evolve in the near future ?
- To what extent and for which activities do companies cooperate with consultants and/or other companies, and how do marketing professionals in these companies think this situation is going to evolve.

Marketing communication is one of the most visible and high-involvement aspects of the marketing function and, as will become clear hereafter, also perceived as one of the most important ones. Marketing communication is subject to substantial environmental influences and challenges: doubts about the effectiveness of mass communication tools, a growing need for more impact, efficiency and accountability, a trend towards more targeted communication strategies, and towards more relationship orientated and interactive communication, increasing specialisation and new technological breakthroughs. Therefore, the second part of this study concentrates upon the communication function in Belgian companies, and tries to explore the following issues:

- To what extent do Belgian marketers attach importance to the various instruments and tools of the communication mix and how does this reflect in the number of people working in these functions ?
- How has this evolved during the past years, and how do they foresee this to evolve in the near future ?
- To what extent and for which communication activities do companies cooperate with consultants and/or other companies, and how do communication professionals in these companies think this situation is going to evolve ?

The study was carried out with 77 marketing and communication professionals in Belgian companies, and was part of a cross-national study that explored the same issues in various European countries.

**Data collection, questionnaire and sample**

The population studied are all marketing and communication professionals working in companies in Belgium. Two sampling frames were used to approach this population. The first one was the database of *Stichting Marketing* (Marketing Foundation), an organisation of Belgian marketing professionals of which the vast majority of Belgian marketers – from very junior to top management – are a member. This member list contains 1150 names. The second list was the membership list of the *Unie van Belgische Adverteerders* (Union of Belgian Advertisers), which contains about 250 high-profile marketing executives, mostly of large Belgian companies.

A questionnaire was designed to be used in various European countries. Some of the questions were adapted to better fit with the local Belgian situation. The questionnaire contained three parts. The first part measured a number of characteristics of the respondents and a number of characteristics of the companies in which the respondents worked. The second part contained questions about the past and expected future evolution of marketing activities and functions, and the role of external partners in this process. The third part focused upon similar issues with regard to the use of the instruments and channels of the marketing communication mix.

The questionnaire was published on the internet, and an email was sent to all 1400 members of the two organisations, asking for their cooperation and containing a link to the website on which the questionnaire was posted. The questionnaire was not only lengthy, but the information sought was in many cases so strategic and detailed, that it was decided to not make every respondent answer every question. Based on the job information that the respondents gave in the first part (marketing or communication professional), they were directed to either the marketing part of the questionnaire or the communication part. This email was sent out mid-June 2005, and a reminder was sent at the end of August 2005. Despite the measures taken to enable an easy and quick completion of the questions, response was disappointing. In total, only 77 people completed most questions, 39 the marketing part, 38 the communication part. This implies that, apart from the respondent and company characteristics that were measured with everyone, all questions relating to either marketing or communication were only answered by 39 c.q. 38 respondents. Notwithstanding the fact that the sample has a number of characteristics that intuitively seem to fit with the Belgian situation, it can by no means be regarded as representative. Therefore, the results presented further are highly exploratory and should be interpreted with caution.

Table 1 gives an overview of the characteristics of the companies that are represented in the samples. Table 2 shows a number of characteristics of the respondents. Belgium is a small open economy with a lot of small and medium-sized companies (SME's) (employment less than 100) as well as mostly subsidiaries of international companies, and a mainly service-oriented economy. This profile is to a certain extent reflected in the sample characteristics. 61% of the companies involved are headquarters, slightly more than half have mainly international ownership, service companies account for 40% of the sample, and SME's are a substantial part of the sampled companies. Additionally, slightly more than half have a marketing departmement of less then 4 people, and two thirds have a communication department of less than 4 employees. For the vast majority of companies, marketing and communication expenses are less then 20% of turnover. Furthermore (not given in Table 1), 49% are one-brand companies, 62% market more than 100 products, 62% are exporters, for 69% of all companies exports are between 0 and 20 of turnover, and 19% of them export more than 40% of their turnover.

Table 1. Description of sample – companies

| **Subsample** | **Marketing N1** | **Communication N2** | **Two samples (%)** |
|---|---|---|---|
| Headqarters | 22 | 25 | 61 |
| Subsidiary | 17 | 13 | 39 |
| | | | |
| Mainly national | 20 | 21 | 53 |
| Mainly international | 19 | 17 | 47 |
| | | | |
| Food | 3 | 7 | 13 |
| Non-food | 4 | 3 | 9 |
| Durables | 4 | 5 | 12 |
| Services | 20 | 11 | 40 |
| Public/non-profit | 2 | 4 | 8 |
| Business-to-business | 18 | 20 | 50 |
| Retail | 7 | 4 | 14 |
| | | | |
| Turnover 2004 < 2 million euro | 9 | 9 | 27 |
| Turnover 2004 < 2-100 million euro | 17 | 11 | 43 |
| Turnover 2004 > 100 million euro | 9 | 11 | 30 |
| | | | |
| Number of employees 2004 <10 | 7 | 4 | 15 |
| Number of employees 2004 11- 100 | 16 | 14 | 40 |
| Number of employees 2004 >100 | 16 | 18 | 45 |
| | | | |
| Less then 4 marketing staff | 23 | 19 | 56 |
| 4 or more marketing staff | 16 | 17 | 44 |
| | | | |
| Less than 4 communication staff | 26 | 22 | 67 |
| 4 or more communication staff | 11 | 13 | 33 |
| | | | |
| Marketing expenses 0-20% of turnover | 33 | 37 | 91 |
| Marketing expenses 21-40% of turnover | 6 | 1 | 9 |
| | | | |
| Communication expenses 0-20% of turnover | 37 | 37 | 96 |
| Communication expenses 21-40% of turnover | 2 | 1 | 4 |

Cells of columns 2 and 3 are frequencies, N1=39, N2=38. For some categories there are missing values.

In Table 2 a number of characteristics of the repondents are given. 61% of the respondents classify themselves as ‘top management’, either in a marketing or a communication function, or both. Almost two thirds have more than five years experience in a marketing or communication function, and work in companies that have had a marketing and/or communication department for at least five years. Since the questions asked are of a rather strategic and corporate-level nature, the high level of experience of the respondents and their top-management qualification gives a certain confidence as to the validity of the answers given.

Table 2. Description of sample - respondents

| **Subsample** | **Marketing N1** | **Communication N2** | **Two samples (%)** |
|---|---|---|---|
| Marketing/sales top management | 15 | 15 | 39 |
| Marketing/sales middle management | 13 | 10 | 30 |
| Marketing and sales other level | - | 1 | 1 |
| Communication top management | - | 17 | 22 |
| Communication middle management | - | 21 | 27 |
| Communication other level | - | - | - |
| Other function top management | 9 | 3 | 16 |
| Other function middle management | 2 | - | 3 |
| | | | |
| Experience marketing <1 year | 1 | 3 | 5 |
| Experience marketing 1-5 years | 9 | 13 | 29 |
| Experience marketing >5 years | 29 | 22 | 66 |
| Experience communication <1year | 6 | 3 | 11 |
| Experience communication 1-5 years | 9 | 13 | 29 |
| Experience communication >5years | 24 | 22 | 60 |
| | | | |
| Marketing department in company <5years | 16 | 13 | 38 |
| Marketing department in company >= 5 years | 23 | 25 | 62 |
| | | | |
| Communication department in company <5years | 18 | 10 | 36 |
| Communication department in company >= 5 years | 21 | 28 | 64 |

Cells of columns 2 and 3 are frequencies, N1=39, N2=38.

**Past, present and future of marketing activities**

In the first subsample, the respondents’ perception of the importance of marketing activities and functions today and in the past, and their perception of future importance are studied, as well as outsourcing trends for certain activities. In Table 3 the perceived importance ratings for a number of marketing activities are given. Although these scores (on five point scales) are relatively close to one another, and all activities seem at least moderately important to the respondents, it is noteworthy that activities such as customer contact (care and relationship management), market analysis (both competitor and customer) and the communication function are in the top half of the list.

Table 3. Frequency of marketing activities performed by companies (in order of importance)

| **Type of activity** | **Score** |
|---|---|
| Customer care | 4.08 |
| Communication | 4.01 |
| Customer relationship management | 3.90 |
| Market and competitor analysis | 3.69 |
| Positioning | 3.64 |
| Customer analysis | 3.62 |
| External marketing planning | 3.49 |
| Price analysis | 3.49 |
| New product development | 3.46 |
| Segmentation | 3.31 |
| Internal marketing planning | 3.31 |
| Distribution analysis | 3.28 |
| Trade marketing | 2.82 |
| Product and packaging analysis | 2.67 |

Cells are scores on five-point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always. N=39.

Another way to asses the (dynamics) of the relative importance of marketing activities is to look at the number of staff that is being assigned to these various activities, and the evolution of staffing in recent year. This is shown in Table 4. In the second column of this table, the average number of staff devoted to certain marketing activities in 2004 is given. In some cases, these average numbers are biased by a limited number of companies with an extremely high number of employees in certain areas (for instance sales or trade marketing), but overall the order of importance was not affected by these outliers. In the last column of the table, the percentage change in number of employees relative to the year 2000 is shown. The differences between marketing activities with respect to the number of employees and its relative growth are substantial. In Table 5 this information is summarized by assigning each marketing activity to one of nine categories, based on their relative importance (number of employees) and the employee growth for each category. Certain observations in Table 3 are confirmed, such as the importance of customer care and customer relationship management, both in terms of size and growth. Also the very important and still moderately growing sales fucntion points at an increasing cutomer-oriented focus. However, the perceived relative importance of marketing activities as indicated in Table 3 is not always consistent with the number of employees that are devoted to each activity. For instance, customer care is said to be very important, but the number of employees in this activity is far less than that in trade marketing, which is much further down the list in Table 3.

Table 4. Number (2004) and evolution (2000-2004) of staff in different marketing activities (in order of importance)

| **Marketing activity** | **Average number of staff (2004)** | **% change (2000-2004)** |
|---|---|---|
| Sales | 65.31 | 14.88 |
| Trade marketing | 41.76 | 2.27 |
| Key account management | 41.25 | 6.88 |
| Marketing -other | 12.09 | 19.79 |
| Area management | 5.83 | 8.58 |
| Customer care | 5.32 | 33.46 |
| Product development | 4.83 | 27.54 |
| Product management | 4.77 | 3.65 |
| Customer relationship management | 3.64 | 34.89 |
| Merchandising | 3.42 | 13.16 |
| Marketing research | 2.63 | 23.14 |
| Brand management | 2.43 | 14.40 |

Table 5. Categories of marketing activities based on number and evolution of staff

| | | |
|---|---|---|
| **Very important and fast growth**<br>None | **Very important and moderate growth**<br>• Sales<br>• Marketing - other | **Very important and slow growth**<br>• Trade marketing<br>• Key account management |
| **Moderately important and fast growth**<br>• Customer care,<br>• Customer relationship management<br>• Product development | **Moderately important and moderate growth**<br>• Merchandising | **Moderately important and slow growth**<br>• Area management<br>• Product management |
| **Less important and fast growth**<br>None | **Less important and moderate growth**<br>• Marketing research<br>• Brand management | **Less important and slow growth**<br>None |

Very important: >10, moderately important: >3
Fast growth: >25%, moderate growth: >10%

Respondents were also asked to indicate to what extent marketing activities, departments and functions would evolve in the medium term (3 to 5 years). It is remarkable to note that the top four marketing activities that were reported to be extremely important today are indicated as top priorities in the future too (Table 6). Furthermore, the departments and functions that had the highest and fastest growing number of personnel (Table 5) were also indicated as the most important ones in the future (table 7). It is reasonable to conclude that in this, albeit relatively small, sample of respondents and companies, customer orientation and sales, communication and market and customer analysis are, have been, and seem to remain the most important marketing activities.

The last question to be explored was the extent to which marketing activities and functions were outsourced, and how this has evolved in the past. In Table 8 the relative importance of outsourcing different marketing functions is shown, and the evolution of this score from 2000 to 2004. In Table 9 the future intentions with respect to searching alliances are explored. It is remarkable to note that, although the scores have increased in recent years for all marketing activities measured, average scores are in most cases still below 3. The same goes for future intentions. Furthermore, almost half the companies indicated that they were not considering alliances in the future. This indicates that there is indeed a moderate growth in the inclination to outsource marketing activities, but that it is not, has not been, and will not become common practice to outsource them fully and extensively.

Table 6. Evolution of importance of different marketing activities in the future, i.e. 3 to 5 years (in order of importance)

| **Marketing activity** | **Score** |
|---|---|
| Communication | 3.67 |
| Customer relationship management | 3.59 |
| Customer analysis | 3.59 |
| Market and competitor analysis | 3.59 |
| Segmentation | 3.56 |
| Customer care | 3.54 |
| Positioning | 3.49 |
| Internal marketing planning | 3.44 |
| Price analysis | 3.44 |
| External marketing planning | 3.41 |
| Distribution analysis | 3.31 |
| New product development | 3.26 |
| Trade marketing | 3.00 |
| Product and packaging analysis | 2.92 |

Cells are scores on five point scales: 1=far less important, 2=less important, 3=equally important, 4=more important, 5=far more important

Table 7. Evolution of importance of different marketing departments and functions in the future, i.e. in 3 to 5 years (in order of importance)

| **Marketing activity** | **Score** |
|---|---|
| Customer care | 3.66 |
| Customer relationship management | 3.63 |
| Sales | 3.63 |
| Key account management | 3.45 |
| Marketing research | 3.29 |
| Product development | 3.26 |
| Product management | 3.08 |
| Trade marketing | 3.00 |
| Brand management | 2.97 |
| Area management | 2.95 |

Cells are scores on five point scales: 1=far less important, 2=less important, 3=equally important, 4=more important, 5=far more important

Table 8. Importance of outsourcing marketing activities (2004, in order of importance) and evolution of outsourcing (2000-2004)

| **Outsourced activity** | **Score 2004** | **% change in score 2000-2004** |
|---|---|---|
| Marketing consultancy | 3.23 | 18.26 |
| Marketing research | 3.00 | 23.93 |
| New product development | 2.05 | 11.26 |
| Merchandising | 2.05 | 21.26 |
| Call center | 2.03 | 18.95 |

Cells in the second column are scores on five point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always

Table 9. Importance of alliances in the future for different marketing activities

| **Type of activity** | **Score** |
|---|---|
| Sales promotion | 2.95 |
| Co-branding | 2.81 |
| Distribution | 2.57 |
| New product development | 2.57 |
| Market introduction | 2.48 |

Cells in the second column are scores on five point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always

**Past, presence and future of communication activities**

In the second subsample, the respondents' perception of the relative importance of communication activities and functions and in the past, and their perception of future importance are studied, as well as outsourcing trends for certain activities.

First of all, it is interesting to note that 21 out of 38 respondents state that their company does not have a separate communication department (Table 10). In most of the other companies, the marketing department or top management is responsible for communication. Perhaps this can be explained by the relatively large amount of SME's, that have integrated their communication function in other departments. Most respondents (32) claim that in their company there is a coordination between the communication department(s) and top management. Eighteen respondents state that this is effectuated by a permanent coordination committee; in 20 cases ad hoc working groups coordinate the communication activity. These results are in line with a study that was carried out in the same period in a sample of 150 communication professionals (Avisio-Tagora, 2005). In this survey 79% of the respondents stated to have formal coordination procedures. Although in practice companies at least seem to strive for 'integrated communication', according to the same study the concept of Integrated (Marketing) Communication was known only by 53% of the respondents.

Table 10. Departments responsible for communication activities

| Department | Number |
|---|---|
| Seperate communication department | 17 |
| | |
| Marketing | 18 |
| Top management | 10 |
| Sales | 5 |
| Human resources | 1 |
| Advertising | 1 |
| Public relations | 1 |

Respondents could indicate 1 or 2 departments.
N=38.

In Table 11 the perceived importance ratings for a number of communication tools and instruments are given. The isolated top position of web communication is remarkable, as are the relatively high scores of internal and direct communication. Corporate communication activities and tools are mostly in the bottom half of the list. In Table 12 the average number of employees devoted to each communication activity in 2004 and the percentage growth of the average staff between 2000 and 2004 are given. It is important to notice that the growth percentages are generally very high, and ceratinly higher than the growth rates found in the marketing section of this overview. This is an indication of the growing importance of the communication fucntion in marketing and in companies in general, and is in line with the results found in the Tagora/Avisio study (2005) in which the majority of respondents indicated that they expected budgets to increase.

Table 11. Frequency of use of communication instruments (in order of importance)

| Communication instrument | Score |
|---|---|
| Internet | 4.26 |
| Internal communication | 3.95 |
| Direct communication | 3.89 |
| Product/brand advertising | 3.68 |
| Sales promotion | 3.45 |
| Corporate public relations | 3.26 |
| Trade fairs | 3.13 |
| Product/brand public relations | 2.97 |
| Catalogues | 2.84 |
| Corporate advertising | 2.82 |
| Corporate sponsorship | 2.61 |
| Product/brand sponsorship | 2.58 |
| Investors relations | 2.32 |

Cells in the second column are scores on five point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always

Table 12. Number (2004) and evolution (2000-2004) of staff in different communication activities (in order of importance)

| **Communication activity** | **Average number of staff (2004)** | **% change (2000-2004)** |
|---|---|---|
| Sales promotion | 6.56 | 52.90 |
| Direct communication | 5.24 | 76.34 |
| Trade fairs | 4.96 | 7.84 |
| Internal communication | 4.96 | 32.90 |
| Catalogues | 4.95 | 78.28 |
| Product/brand advertising | 4.08 | 32.67 |
| Web communication | 2.70 | 41.15 |
| Product/brand sponsorship | 2.42 | 25.21 |
| Corporate public relations | 2.00 | 16.65 |
| Corporate advertising | 1.96 | 5.10 |
| Product/brand public relations | 1.87 | 26.74 |
| Corporate sponsorship | 1.65 | 18.94 |
| Investor relations | 1.45 | 18.39 |

Cells in the second column are scores on five point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always

Table 13. Categories of communication activities based on number and evolution of staff

| | | |
|---|---|---|
| **Very important and fast growth**<br>• Sales promotion<br>• Direct communication<br>• Catalogues | **Very important and moderate growth**<br>• Internal communication | **Very important and slow growth**<br>• Trade fairs |
| **Moderately important and fast growth**<br>None | **Moderately important and moderate growth**<br>• Product/brand advertising<br>• Product/brand sponsorship<br>• Web communication | **Moderately important and slow growth**<br>None |
| **Less important and fast growth**<br>None | **Less important and moderate growth**<br>• Product/brand public relations | **Less important and slow growth**<br>• Corporate sponsorship<br>• Investor relations<br>• Corporate public relations<br>• Corporate advertising |

Very important: 4.95 or more, moderately important: 2.42 or more
Fast growth: >50%, moderate growth: >25%

On the basis of number of employees and relative growth of staff, in Table 13 the different communication activities are split up into nine categories. This overview revelas a number of interesting obsevations. First of all, most 'corporate' tools are in the 'low importance - low growth' category, and most tools in the 'high importance – high growth' category are very behaviour-oriented, short-term, measurable and accountable tools. This is in line with the observation that marketing communication professionals are pushed to spend their communication budgets on directly effective and measurable tools. Furthermore, it is also remarkable that most tools are on the diagonal of table 13: less important tools have grown at slower rates than very important tools. If this evolution continues, this would lead to a situation in which fewer tools are taking up larger parts of the communication budget. This is not in line with the idea that integrated and more targeted communication implies a greater diversity of instruments. In the Tagora/Avisio study (2005) 25% of the respondents indicated to use 1-6 communication instruments, but 28% claimed to use 13-18 tools (out of a list of 18).

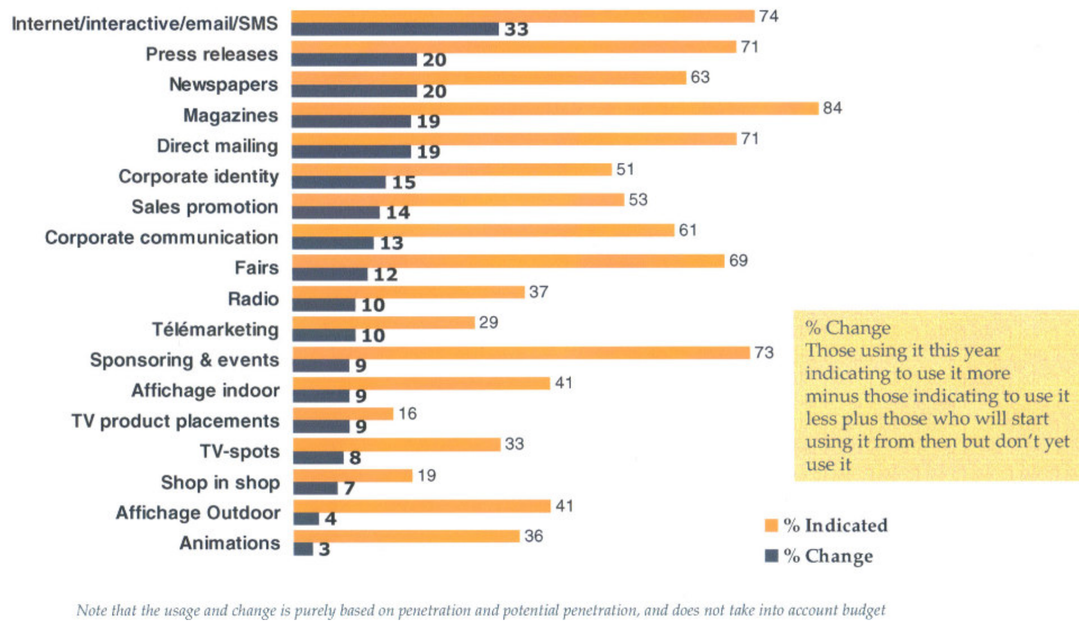
In Table 14 shows to what extent respondents indicated that the various communication tools would become more or less important, relative to the current situation. It is noteworthy that the top three tools are the same as the top three instruments currently used. This indicates that the tools that were indicated to be important today will remain important in the future too. The tagora/Avisio study also measured the (intentions of) use of different communication tools, albeit in a different way. In figure 1, the current use of various communication instruments and the intended change in use of these instruments are shown. All instruments are indicated to become more important. Again, electronic and direct communication appear to be important instruments, both today and in the future. In figure 2 these various tools are shown on the basis of two dimensions: their relative importance today and their relative expected growth in the future. Again, the isolated position of electronic communication (high use – high growth) is remarkable. Product placement, although not very important tody, is expected to grow substantially. This technique is indeed perceived by many advertisers as an impactful alternative for traditional mass media advertising.

Table 14. Evolution of importance of different communication activities in the future, i.e. 3 to 5 years (in order of importance)

| **Communication activity** | **Score** |
|---|---|
| Direct communication | 4.00 |
| Web communication | 3.97 |
| Internal communication | 3.82 |
| Product/brand advertising | 3.45 |
| Corporate public relations | 3.42 |
| Sales promotion | 3.37 |
| Product/brand public relations | 3.29 |
| Corporate advertising | 3.08 |
| Investor relations | 3.08 |
| Corporate sponsorship | 2.95 |
| Product/brand sponsorship | 2.92 |
| Trade fairs | 2.89 |
| Catalogues | 2.71 |

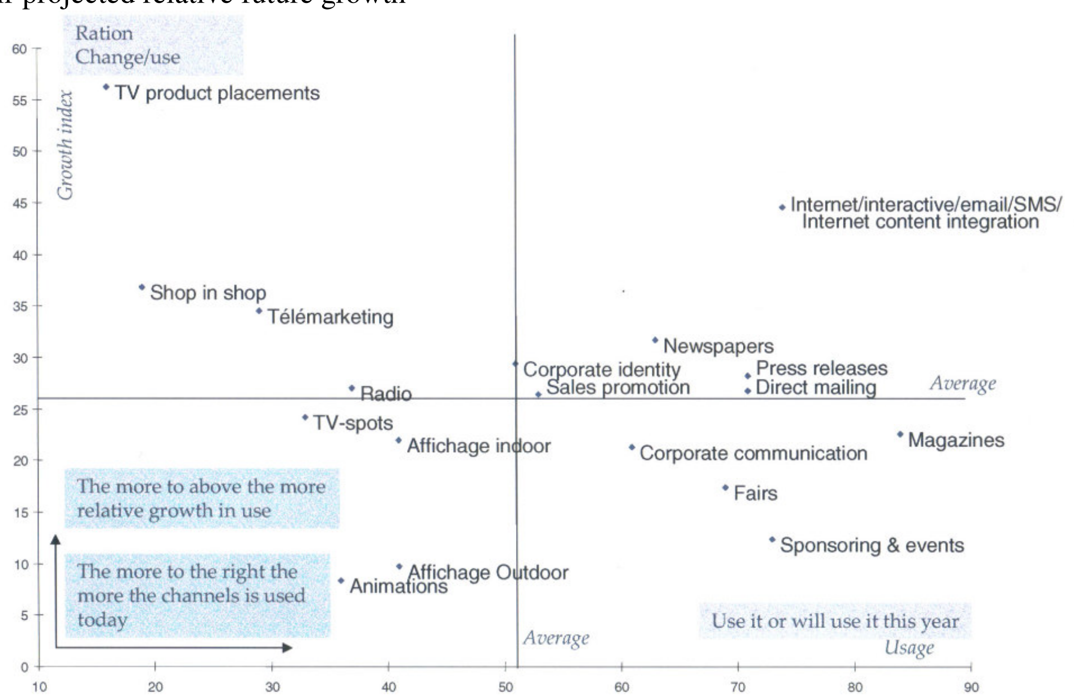
Cells are scores on five point scales: 1=far less important, 2=less important, 3=equally important, 4=more important, 5=far more important

Figure 1. Relative importance today and in the future of different marketing communication instruments




Source: Integrated marketing communication in Belgium, Internal report Tagora.com, executed by Avisio, 2005

Figure 2. Categories of communication instruments based on their current importance and their projected relative future growth




Source: Integrated marketing communication in Belgium, Internal report Tagora.com, executed by Avisio, 2005.

In Tables 15 and 16 the current and future outsourcing of communication activities is shown. As was the case in the marketing section, most activities receive scores of less than three, indicating a low inclination to outsourcing both today and in the future. Not surprisingly, advertising and web communication are outsourced the most, while most corporate communication tools, as well as sponsorship and public relations in general are hardly ever outsourced. This oservation is confirmed in Table 16. On the basis of these results it can be concluded that there is no real tendency to extensively outsource communication. However, the most important instruments are (planned to be) outsourced themost. This indicates that companies actively seek external expertise expecially for those communication activities that they consider very important and apparently perceive the higher risk of outsourcing to be counterbalanced by the benefits of seeking external expertise..

Table 15. Importance of outsourcing communication activities

| **Communication activity** | **Score** |
|---|---|
| Product/brand advertising | 3.29 |
| Direct communication | 3.24 |
| Web communication | 2.97 |
| Trade fairs | 2.74 |
| Corporate public relations | 2.71 |
| Sales promotion | 2.63 |
| Corporate advertising | 2.63 |
| Catalogues | 2.53 |
| Product/brand public relations | 2.42 |
| Product/brand sponsorship | 2.00 |
| Internal communication | 1.92 |
| Corporate sponsorship | 1.92 |
| Investor relations | 1.89 |

Cells in the second column are scores on five point scales: 1=never, 2=seldom, 3=sometimes, 4=often, 5=always

Table 16. Evolution of outsourcing different communication activities in the future, i.e. 3 to 5 years (in order of importance)

| **Communication activity** | **Score** |
|---|---|
| Direct communication | 3.53 |
| Web communication | 3.42 |
| Internal communication | 3.11 |
| Product/brand advertising | 3.11 |
| Corporate public relations | 3.11 |
| Corporate advertising | 3.08 |
| Product/brand public relations | 3.05 |
| Sales promotion | 3.05 |
| Trade fairs | 2.97 |
| Investor relations | 2.92 |
| Corporate sponsorship | 2.92 |
| Product/brand sponsorship | 2.92 |
| Catalogues | 2.92 |

Cells are scores on five point scales: 1=far less , 2=less , 3=the same, 4=more, 5=far more

**Conclusions**

The results of this exploratory investigation amongst Belgian marketing and communication professionals indicate that customer orientation and sales, market and customer analysis and communication are the most important marketing functions, and will remain to be so in the near future. Strategic issues such as segmenting, targeting and positioning, and 'traditional' tools such as distribution and pricing' appear to be losing ground in favour of activities that stimulate a better knowledge of and a more direct contact with the customer.

The increasing importance of the communication function is illustrated by the fact that the use and staffing of all communication activities are said and shown to increase. Again, direct and/or interactive tools, such as electronic and direct communication, are increasingly important. Also internal communication, a crucial tool to motivate a company's personnel to actively put principles such as customer orientation into practice, appears to be increasingly important.

Belgian companies are not inclined to extensively outsource their marketing and communication activities, with the exception of marketing research and those communication activities that are perceived to be very important and for which external expertise is apparently sought.

This study is limited in that only a small and probably non-representative sample of companies and respondents was studied. Some of the observations were confirmed by the Tagora/Avisio study, but netvertheless the results should be interpreted with caution and certainly warrant further investigation in more representative samples of companies and marketing and communication professionals.