TMSA
Transportation Marketing & Sales Association

2024

2024 MARKETING & SALES METRICS STUDY

For the transportation, logistics and supply chain industry

TMSA enables sales and marketing professionals to learn about and advance the transportation and logistics industry through education, connections and resources.

2024 Marketing & Sales Metrics Study

Introduction

The 2024 TMSA Marketing & Sales Metrics Study marks the sixth edition of this comprehensive biennial analysis, conducted by the Transportation Marketing & Sales Association (TMSA). This iteration was created in collaboration with PATH, a leading supply chain customer research firm.

Designed with business professionals in transportation, logistics, and supply chain in mind, the study serves as a vital resource for understanding the latest trends, strategies, and performance metrics shaping marketing and sales efforts in these industries.

This study offers more than just a snapshot—it tracks how marketing and sales tactics have evolved over time, helping you benchmark your organization's efforts against industry standards. The previous survey, conducted in 2022, captured data during the immediate aftermath of the COVID-19 pandemic. Now, in 2024, the study delves into how transportation and logistics companies have adapted and innovated in the post-pandemic landscape.

From sales quotas to the most effective marketing channels, the report goes beyond surface-level metrics. It offers an in-depth look at the technologies that companies are leveraging, how they're being implemented, and their impact on both sales and marketing functions.

For demographic information on survey respondents, see pages 32-34.

State of the Market

Sales & Marketing in Transportation & Logistics

The Pressure to Deliver Reliability in Unstable Times:

Supply chains are in a constant state of disruption. From global pandemic aftershocks and political tensions to natural disasters, the challenges seem to keep piling up. For companies, resilience is no longer optional—it's a necessity. Possible solutions include diversifying suppliers, building buffer inventories, and adopting flexible logistics solutions. Sales and marketing professionals are not only tasked with promoting powerful solutions but also positioning their companies as dependable partners in an era where reliability is hard to come by.

The Inflation Squeeze:

Inflation is tightening its grip on the industry, driving up transportation costs, fuel prices, and labor expenses—all of which eat away at profit margins. For sales and marketing teams, the pressure is mounting to craft compelling narratives that highlight value. Whether it's cost savings, efficiency improvements, or innovative technologies, the message has to show how these offerings help customers overcome rising expenses and maintain a competitive edge.

The Ever-Evolving Technology Game:

No one in logistics and transportation is untouched by the rapid rise of automation, AI, and digitalization. On the operations side, real-time tracking, warehouse automation, and data analytics are taking center stage. For sales and marketing, technology presents an opportunity to enhance internal capabilities without increasing headcount—a competitive edge in today's market. However, staying ahead of the tech curve is challenging, and many companies are still navigating how to harness these tools effectively to drive real value.

Key Insight

The 'Great Resignation' has ended, but our longest tenured employees are leaving.

In the 2022 report, most respondents had been in their roles for less than five years, and of that group, more than half had been in their positions for less than two years. This highlighted a trend of rapid turnover or fresh hires within transportation and logistics.

Fast forward to 2024, and the data paints a bit of a different picture. There's been a noticeable shift toward longer tenure, with employees in the 2-5 year and 5-10 year categories increasing by 19% and 15%, respectively. This shift suggests greater stability in these roles, as professionals are now staying longer, likely gaining more experience and becoming more deeply embedded in their organizations.

However, the data also reveals a decline in employees who have been in their roles for more than 10 years, showing a 13% drop compared to previous years. This decline points to a wave of longer-tenured employees either transitioning into new positions or choosing to leave the workforce altogether. The shift could be influenced by retirement, career pivots, or perhaps the impact of post-pandemic work-life balance decisions, signaling a generational turnover in leadership and expertise across the industry.

Time in Current Position	2022	2024	Δ
0 - 2 years	35%	14%	↓
2 - 5 years	23%	41%	↑
5 - 10 years	20%	35%	↑
10 - 20 years	15%	6%	↓
20+ years	8%	4%	↓

This evolving workforce landscape presents both challenges and opportunities for companies. On one hand, the increase in mid-tenure employees suggests more continuity and institutional knowledge, but on the other, the loss of highly experienced professionals means organizations need to focus on knowledge transfer and leadership development to maintain momentum and drive future growth.

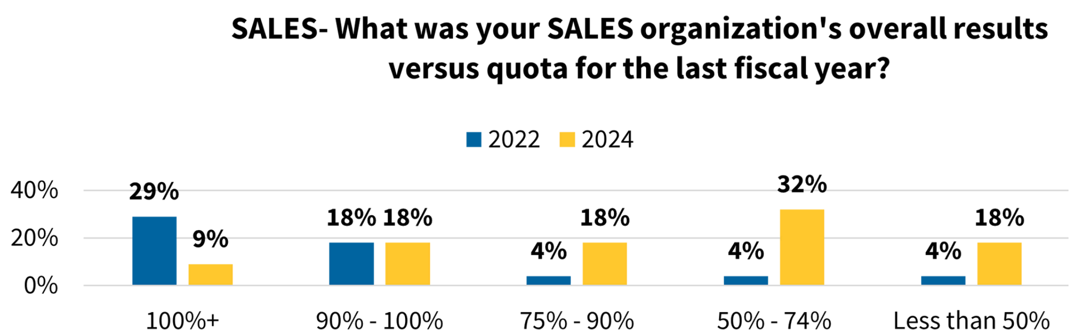
Key Insight

Fewer companies are reaching their sales goals.

In 2022, 92% of organizations were able to achieve more than 75% of their sales quota. However, this figure has significantly declined in 2024, with only 45% of organizations reaching that same threshold. There are several factors to consider in this drop of performance.

Firstly, both unrealistic sales quotas and dramatic changes in accounts have been on the rise as cited reasons for missing targets. In 2022, these challenges were mentioned by 13% of organizations, but by 2024, that number had risen to 20%. These pressures, when compounded, make it increasingly difficult for sales teams to hit their goals, which can lead to frustration and missed opportunities.

Additionally, the availability of proper training programs has become a major factor in shaping sales outcomes.



While comprehensive training is crucial to maintaining a skilled adaptive salesforce, only 48% of organizations in 2024 report having a robust and established training program.

In this rapidly shifting environment, organizations that fail to adjust expectations or invest in upskilling their teams risk falling further behind.

SALES Respondents	
Does your organization have a formalized ongoing SALES training program?	**% of 2024 Sample**
Yes, we have a comprehensive training program	48%
Yes, but it is limited and somewhat inadequate	29%
No, we do not have a formal sales training program	12%
Yes, we are committed to ongoing sales training/professional development	8%

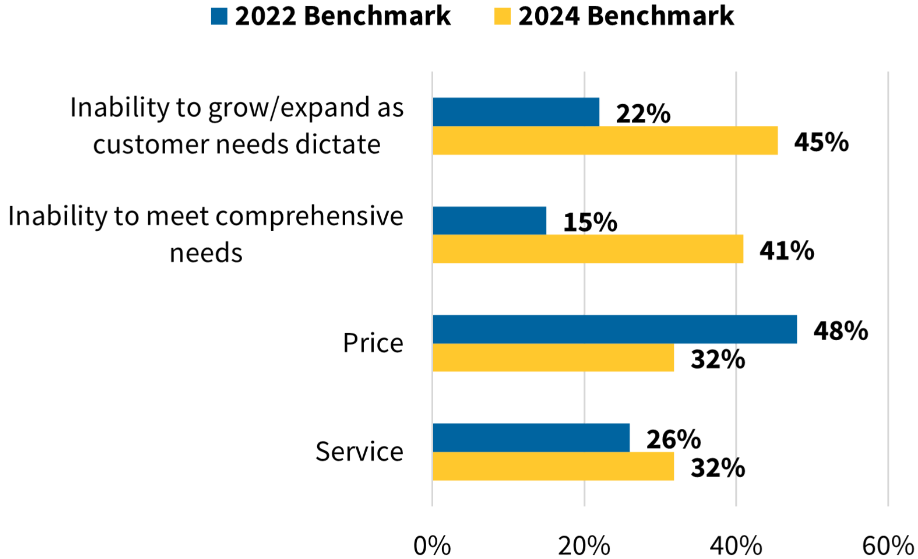
Key Insight

Lost business factors have shifted.

The drivers of lost business have proven to be one of the most volatile and evolving metrics in this benchmarking study. In 2022, Price was the clear frontrunner, cited by 48% of organizations as the leading cause of lost business. Following closely was Service, which accounted for 26% of lost business then.

However, by 2024, the landscape has dramatically shifted. The biggest contributions to lost business are now Inability to grow with customer needs (45%) and Inability to meet needs (41%).

What are the top 3 factors primarily responsible for your organization losing business from its customer base?



Note: Remaining percents are “don’t know/decline to answer”

*See page 19 for full lost of lost business

These two factors have surged by 23% and 26%, respectively, highlighting a major change in what drives customer retention and satisfaction. The data reflects a growing expectation from customers for their partners and providers to evolve and scale alongside them, adapting to more complex and dynamic needs.

This shift presents a unique opportunity for marketing and sales teams to step up and drive substantial value for their organizations. Positioned at the front lines of customer interaction, they are in the perfect place to serve as the "tip of the spear" – consistently monitoring customer pain points and identifying unmet needs before they lead to lost business. By staying ahead of customer demands and working collaboratively across departments to deliver solutions that support growth, Marketing and sales teams can play a pivotal role in both retaining clients and driving long-term success.

For organizations looking to thrive in this new landscape, the ability to anticipate and act on evolving customer needs will be a key differentiator, making proactive marketing and sales strategies more critical than ever.

Key Insight

55% of companies lack a formal process to understand customer needs.

The 2024 TMSA Benchmarking Study sends a clear warning: organizations that lack effective processes to understand and engage with their customers are at a heightened risk of losing business. As customer expectations continue to evolve, companies that fail to stay aligned with these changing needs are at a serious disadvantage.

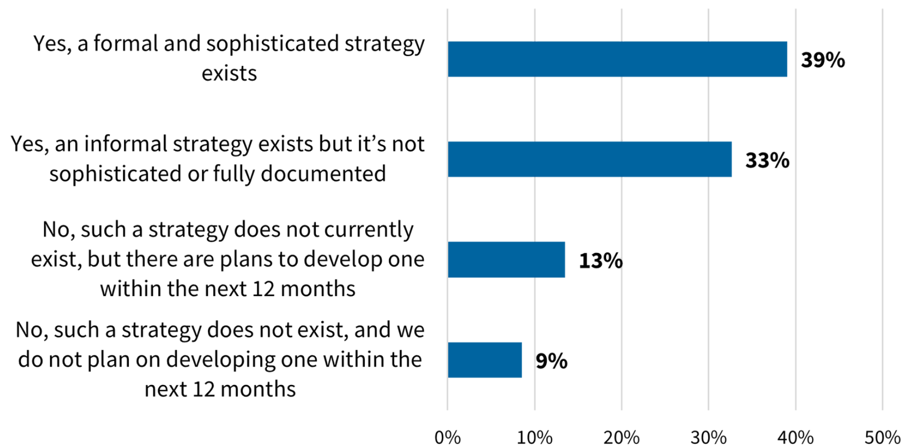
A striking finding from the benchmark is that only 39% of organizations currently have a formal customer experience or service review strategy in place. This means the majority—more than 60%—are operating without a structured approach to regularly assess and improve how they interact with and serve their customers. This leaves these organizations vulnerable to losing business, as they may miss critical signals that customer needs are shifting or that dissatisfaction is growing.

Without a formalized process, organizations are less likely to capture actionable insights into the customer journey, identify pain points, or respond proactively to service issues. This lack of structure often results in a reactive rather than a proactive approach to customer service.

In an era where customer-centricity is crucial for retention and growth, having a formal strategy isn't just a nice-to-have—it's a necessity for survival and success.

Organizations that invest in these processes will be better positioned to protect themselves against the growing risk of lost business and ensure they remain competitive in an increasingly demanding market.

ALL RESPONDENTS - Does your organization have a formal customer experience (CX) or customer service review strategy in place?

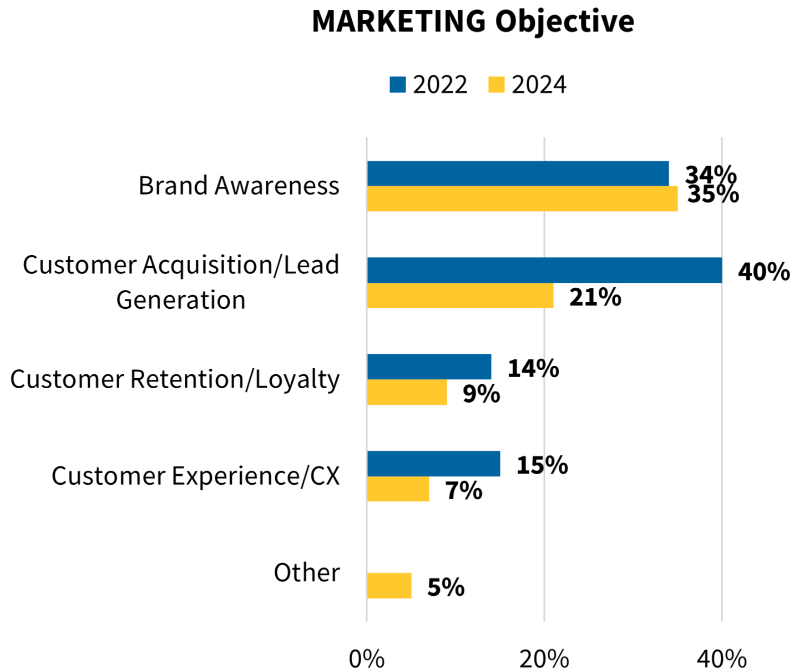


Note: Remaining percents are "don't know/decline to answer"

Key Insight

Brand Awareness rises to top marketing priority.

As the role of marketing leaders continues to grow, their priorities have to shift to adapt to the evolving business landscape. One of the most notable changes is the rise of Brand Awareness as the top priority for marketers. In 2022, 24% of marketers identified it as a key focus, but by 2024, that number has climbed to 35%, reflecting an increasing recognition of the importance of strong brand presence in driving long-term success.



Note: Remaining percents are “don’t know/decline to answer”

As business face growing competition and market saturation, creating a distinct memorable brand identity has become critical for standing out and gaining mindshare.

However, the biggest change in marketing priorities relates to Customer Acquisition/Lead Generation. This area has seen a 19% decrease compared to the previous benchmark. While customer acquisition has traditionally been a cornerstone of marketing efforts, this drop signals a strategic pivot within many organizations. The shift away from aggressive lead generation efforts may suggest that marketers are now focusing more on brand equity and long-term visibility, rather than immediate, transactional customer acquisition strategies.

Customer Retention and Customer Experience (CX) have also experienced declines in priority since 2022. This could indicate that marketers are increasingly being tasked with bringing in fresh business rather than focusing on deepening relationships. It reflects a broader business trend of prioritizing external growth over internal optimization. While brand awareness is important, it is more imperative to tie those initiatives to other engagements, such as customer acquisition or retention. It is not enough for the market to be aware of your brand, but for companies to know what they want to be known for. Additionally, the most successful initiatives have sales and marketing alignment. New business tops sales priorities (see more on page 22), so this misalignment may cause friction.

AI & Platform Integration

AI is revolutionizing operations for sales and marketing teams in transportation and logistics. Capabilities can take activities that have historically been done manually and supercharge them, positioning teams to be more effective, even with minimal internal headcounts.

The list of potential areas of impact continues to grow – including lead management, sales pipeline management, CRM integration, sales automation, reporting, content creation, SEO optimization, email marketing, marketing automation, social media management, analytics, and more.

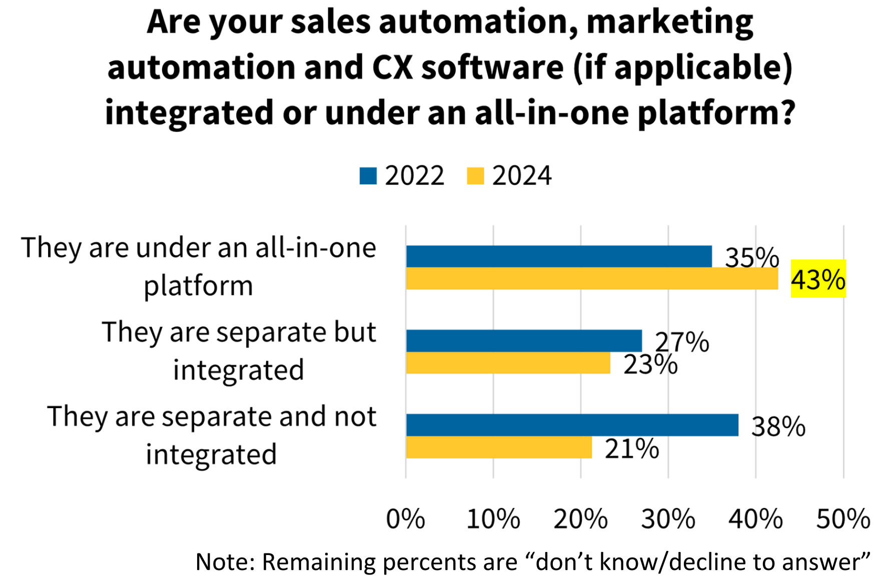
By automating and enhancing processes that were traditionally manual and time-consuming, AI is empowering teams to work more efficiently, make data-driven decisions, and achieve better outcomes. With the continued advancement of capabilities, matched with the investment both from developers and users, it does not look like AI will be a passing trend.

By integrating AI into sales and marketing functions, transportation and logistics businesses can become more agile, data-driven, and responsive to market shifts. The future of the industry is increasingly being shaped by AI, and those companies that invest in these capabilities now may be better positioned to lead the market, enhance customer satisfaction, and capitalize on growth opportunities in the future.

Yet, AI is not the only technological area where companies are investing. All-in-one platform use is on the rise, and companies are utilizing a wide range of software and efficiency tools currently on the market.

All-in-One Platform Use

In 2022, 65% of organizations relied on separate platforms for their sales and marketing operations, but by 2024, this number dropped to 44%. This trend toward consolidating technology partners and vendors reflects an industry-wide shift aimed at streamlining operations and reducing complexity.



One major outcome of this consolidation is the rise in organizations using a single platform for all their software needs. In 2022, only 35% had fully integrated systems, but by 2024, this figure grew to 43%. This shift highlights the growing recognition that unified tools and data allow sales and marketing teams to collaborate more effectively and optimize their strategies.

With centralized software, teams can gain better visibility and transparency across the entire sales and marketing funnel. This enables real-time information sharing, faster decision-making, smoother handoffs, and more accurate outcome attribution. It also allows teams to track the customer journey holistically, from initial marketing contact to closing the sale, ensuring a clearer understanding of customer behavior and performance metrics.

Consolidating platforms also reduces administrative burdens, reduces the chance of human error, lowers costs, and simplifies tech support, allowing teams to focus on engaging prospects, optimizing campaigns, and driving revenue. As more companies adopt single-platform solutions, they benefit from enhanced insights, better alignment between departments, and the ability to make more informed, data-driven decisions—all essential for remaining competitive and achieving long-term success.

AI is growing dramatically in 2024

Companies are increasingly investing in AI to drive growth and innovation, with 50% of marketers reporting that their AI budgets have increased in 2024. This surge in spending reflects the growing recognition of AI's potential to enhance operational efficiency and strategic decision-making.

Has your budget for AI / Efficiency Tools increased compared to last year?	% Sample
Yes, increased	50%
Remained the same	34%

In the sales sector, AI investment has become a top priority, second only to compensation, demonstrating its critical role in boosting productivity, optimizing sales pipelines, and personalizing customer interactions.

SALES Respondents	
Categories	**% Total Sales Budget**
Sales Compensation	44%
AI / Efficiency Tools	13%
Travel & Entertainment	8%
Lead Generation	5%
Marketing	4%
Professional Development/Training	4%
Other	2%

Nearly half of marketers (49%) confirmed that they are actively using AI and efficiency tools for their marketing and communications efforts. These tools can help teams automate tasks, analyze data more effectively, and improve customer targeting, allowing them to achieve better results with fewer resources.

MARKETING Respondents	
Does your organization use AI/Efficiency Tools for marketing/ communications?	**% Sample**
Yes	49%
No, we are not allowed to use AI	28%
No, my organization hasn't implemented any AI	19%

However, the other half of respondents indicated that they are either "not allowed to use AI" or "haven't implemented any AI yet." This reveals a lingering hesitation among some organizations, driven by concerns over security, data privacy, and uncertainty about how to effectively integrate AI into their processes.

This divide highlights that while AI is becoming more widespread, many companies remain cautious about adopting these tools, uncertain about their long-term security and usefulness. Overcoming these concerns will be crucial for organizations looking to stay competitive, as AI continues to shape the future of sales and marketing.

Note: Remaining percents are "don't know/decline to answer"

No AI Governance comes with risk

When adopting AI tools, organizations must be mindful of the risks associated with ownership of materials and intellectual property (IP). It's critical to understand whether your partners or vendors have specific rules in place regarding the use and sharing of IPs. Without clear guidelines, businesses may inadvertently expose proprietary information or face conflicts over ownership of AI-generated content.

Do you know what your team is inputting into AI platforms? If private or secure information is being entered without proper safeguards, it can lead to data breaches, compromised security, and violations of privacy regulations. Many AI platforms operate in cloud-based environments, and unless they are vetted for security, your organization could be exposing confidential data to external threats. This is especially true when using the free or introductory versions. It's essential for companies to establish clear data protection policies when using AI to avoid the inadvertent leakage of critical information.

Despite these risks, many organizations that use AI are still not fully prepared to mitigate them. In fact, 44% of companies that are already using AI do not have formalized rules in place to govern its use.

Does your organization have formalized rules on the use of AI in marketing/communications?	% Sample
Yes	50%
No	25%
No, rules are informal	19%

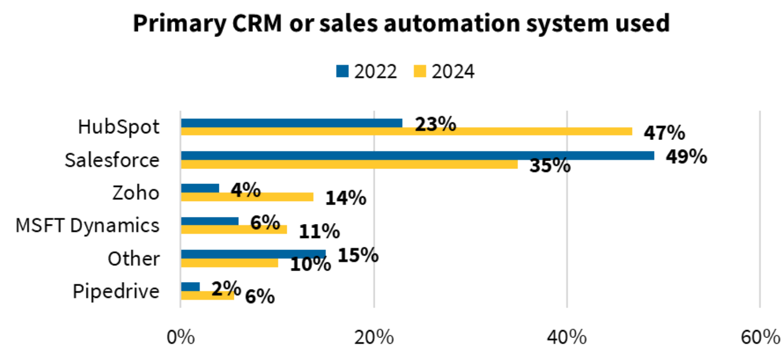
Note: Remaining percents are “don’t know/decline to answer”

This lack of regulation exposes these businesses to significant risks, including potential legal disputes, data breaches, and ethical challenges. Formal AI governance frameworks can help protect the organization while maximizing the benefits that AI can offer.

Additionally, without best practices around AI use, there is a chance that employees may rely too heavily on AI and lose the human element of their interactions. While AI offers impressive automation and efficiency, over-reliance on algorithms can strip away human intuition and emotional intelligence, both of which are crucial in areas, such like customer service, relationship management, and ethical decision-making. This can greatly affect both marketing and sales departments.

HubSpot (Sales) & ChatGPT (Marketing) pull ahead as the most used efficiency tools

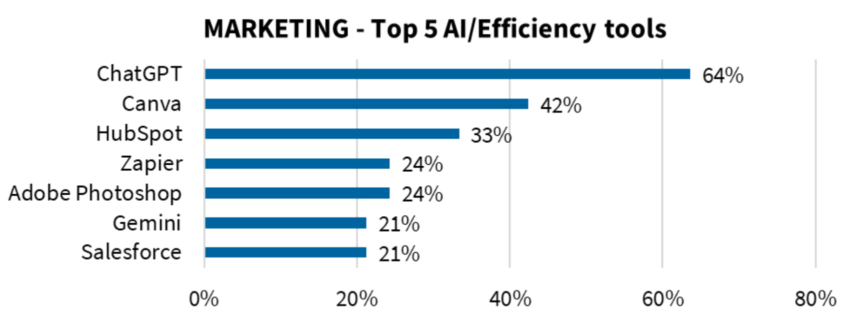
HubSpot has made strides in the sales technology landscape, seeing its adoption jump from 23% in 2022 to 47% in 2024. HubSpot's growth likely reflects its emphasis on providing an all-in-one solution with user-friendly features that appeal to both small and mid-sized businesses looking to streamline their sales processes.



As more organizations prioritize integrated tools that improve efficiency and collaboration, HubSpot's surge signals a major shift in the sales tech ecosystem.

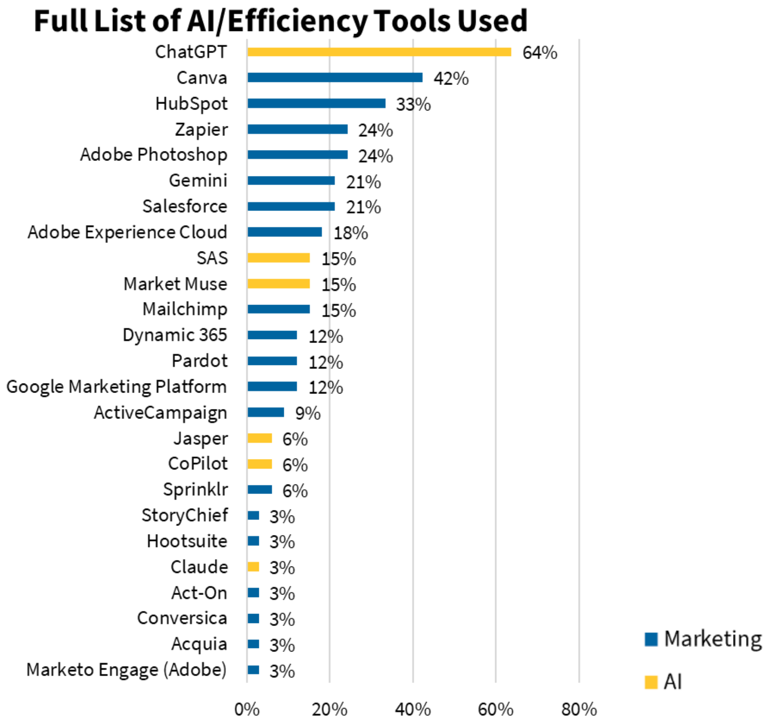
On the marketing side, ChatGPT has emerged as the definitive leader in AI and efficiency tools. With 64% of respondents now using it within their businesses, the AI tool has gained widespread traction for its ability to generate high-quality content quickly, automate repetitive tasks, and enhance customer engagement.

Meanwhile, the overall use of Customer Relationship Management (CRM) systems and sales automation tools has seen a bit of a decline. In 2024, 76% of organizations report using such systems, compared to 90% in 2022.



This dip could suggest that some companies are consolidating or reassessing their tech stacks as they adopt more integrated platforms like HubSpot, which combine CRM, sales automation, and marketing functions under one roof.

Many tools are being utilized for marketing automation



While a few AI and efficiency tools have risen to prominence, it's becoming increasingly evident that sales and marketing teams are utilizing a variety of tools across different platforms. This trend reflects the growing versatility and specialization of AI technologies, where niche tools are carving out space. Teams are integrating multiple tools to meet specific needs, from content creation and data analysis to customer engagement and sales automation.

This diverse approach to efficiency highlights an important shift in how companies are leveraging technology. Niche AI tools, with their specialized capabilities, are starting to gain traction and even compete with market leaders, providing more tailored solutions for different business functions.

The efficiency gains from these platforms are further amplified by AI integrations, which provide deeper insights, better personalization, and faster execution.

As more companies continue to embrace specific AI platforms, as well as software with AI capabilities, the landscape will likely become even more diverse.

Sales

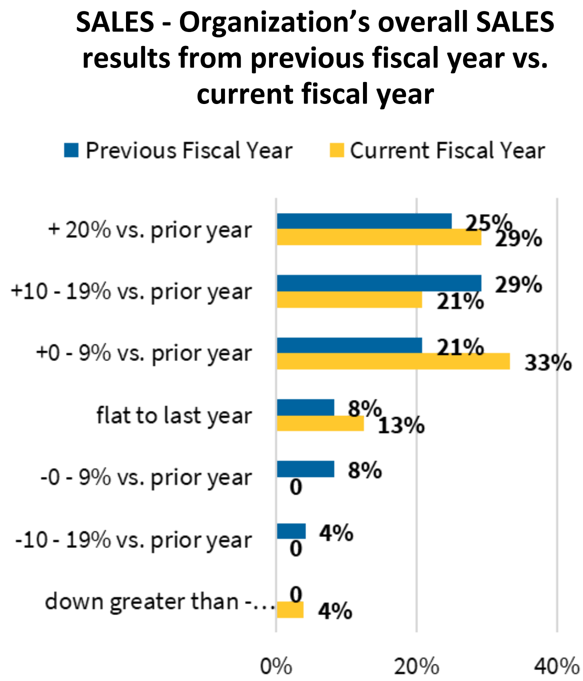
Logistics sales teams are encountering mounting pressure to deliver results in an increasingly dynamic and competitive landscape. The rapid rise of e-commerce has reshaped consumer expectations, demanding faster delivery times and more transparent supply chains. With consumers accustomed to instant gratification, logistics providers must adapt quickly to meet these demands while maintaining efficiency and cost-effectiveness.

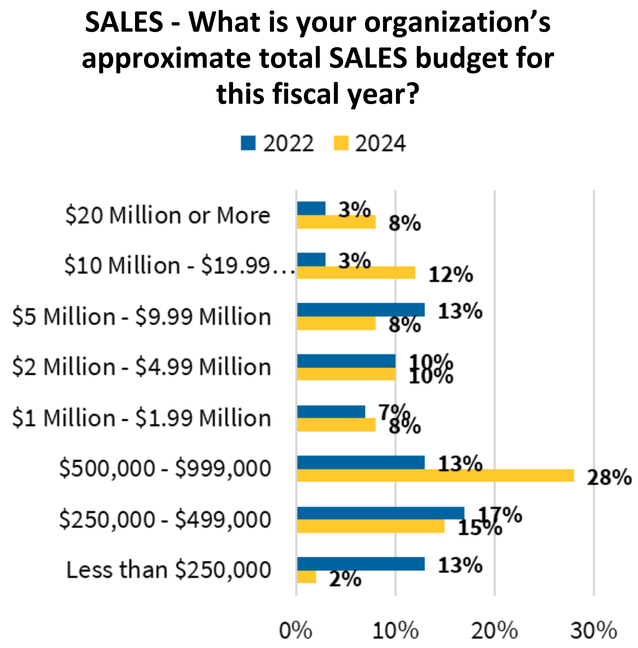
Globalization further complicates the logistics landscape, as companies expand their operations across borders and navigate a myriad of regulations, tariffs, and trade agreements. This international reach requires sales professionals to develop a nuanced understanding of different markets, cultural preferences, and compliance issues. They must be adept at tailoring solutions that resonate with diverse customer needs, balancing local responsiveness with global efficiency.

Technological advancements are also playing a pivotal role in the logistics industry, introducing new tools and platforms that enhance operational efficiency. Sales professionals are now expected to leverage data-driven insights to inform their strategies, identify trends, and anticipate customer demands.

Moreover, as the logistics landscape evolves, collaboration is becoming increasingly essential. Sales teams must work closely with operations, marketing, customer service, and billing departments to ensure a seamless experience for clients. By fostering strong internal partnerships and leveraging cross-functional expertise, logistics sales teams can enhance their value propositions and provide more comprehensive solutions that meet the evolving expectations of their customers.

Sales Revenues/Budgets up





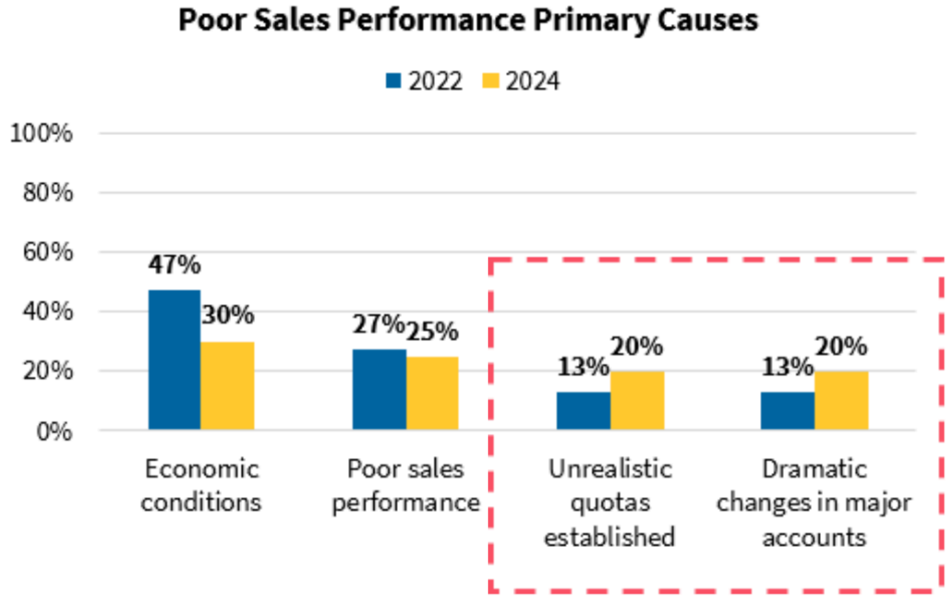
Note: Remaining percents are "don't know/decline to answer"

Sales performance is on an upward trajectory, with 83% of companies reporting improved sales results compared to last year (2023). However, businesses also reported they have not hit their quotas.

The performance is also mirrored in the rising budgets allocated to sales initiatives.
In 2024, 28% of companies report having a sales budget of $5 million or more, a notable increase from just 19% in 2022. This growth in budget highlights the importance organizations are placing on their sales functions as critical drivers of revenue and growth. Companies are increasingly recognizing that investing in sales not only enhances their competitive edge, but also supports long-term business objectives.

As companies continue to invest in their sales teams and embrace innovative approaches, they are setting the stage for sustained success in the marketplace, ultimately driving revenue growth and enhancing overall business performance.

Performance Indicators



In 2022, the primary factors contributing to poor sales performance were "Economic Conditions" and "Poor Sales Performance." These challenges impacted how sales teams operated and strategized. However, as we moved into 2024, while these reasons remained prevalent, there was a notable shift in the underlying issues. The emergence of "Unrealistic Quotas Established" and "Dramatic Changes in Major Accounts" highlights evolving dynamics within the sales landscape.

This shift may be indicative of the adjustments organizations have made in the aftermath of the pandemic. Many companies initially set ambitious sales targets based on extraordinary growth patterns experienced during the pandemic, which were often unsustainable in the long run.

Moreover, "Dramatic Changes in Major Accounts" underscores the volatility many organizations are facing in their customer relationships. As businesses recalibrate their supply chain strategies to navigate market shifts—such as inflation, supply shortages, and evolving consumer demands—they may experience disruptions in their key accounts. This instability can lead to lost sales opportunities and the necessity for sales teams to adapt quickly to new customer expectations and requirements. The shift in focus to these factors reflects a broader recognition that external market forces and internal goal-setting strategies are closely intertwined.

Full list of factors responsible for loss of business

Price has historically been a primary factor in why companies are losing business, yet current market conditions show a big shift. A company's "Inability to Grow or Expand as Customer Needs Dictate" has now vastly outpaced other lost business factors.

The second leading indicator of lost business is an "Inability to Meet Comprehensive Needs," which also plays into the need for a company to be able to work with customers, not just have the best price.

Companies are now more focused on resilience, necessitating a reevaluation of sales strategies and objectives. Organizations aim to remain agile, adjusting their approaches to meet the new realities of the market.

The evolution of reasons for poor sales performance from 2022 to 2024 reflects a broader transformation in the business environment.

Sales budget priorities remain similar to 2022, with added focus on AI and Efficiency

While the overall order of budget allocation remained consistent, the introduction of AI and Efficiency Tools has emerged as a significant new item on the list, rapidly climbing to near the top of priority expenditures. This shift indicates a growing recognition among organizations of the importance of leveraging advanced technologies to enhance productivity and streamline operations.

Categories	2022 Average % Sales Budget	2024 Average % Sales Budget
Sales Compensation (base salaries, commissions, fringe benefits)	58%	44%
AI / Efficiency Tools	-	13%
Travel & Entertainment	15%	8%
Lead Generation (if part of Marketing Budget, do not enter here)	7%	5%
Marketing (if part of Marketing Budget, do not enter here)	12%	4%
Professional Development/Training	7%	4%
Other	5%	2%

Note: Remaining percents are “don’t know/decline to answer”

As companies strive to remain competitive in a fast-evolving market, investing in AI and Efficiency Solutions has become essential for driving innovation and optimizing resource utilization.

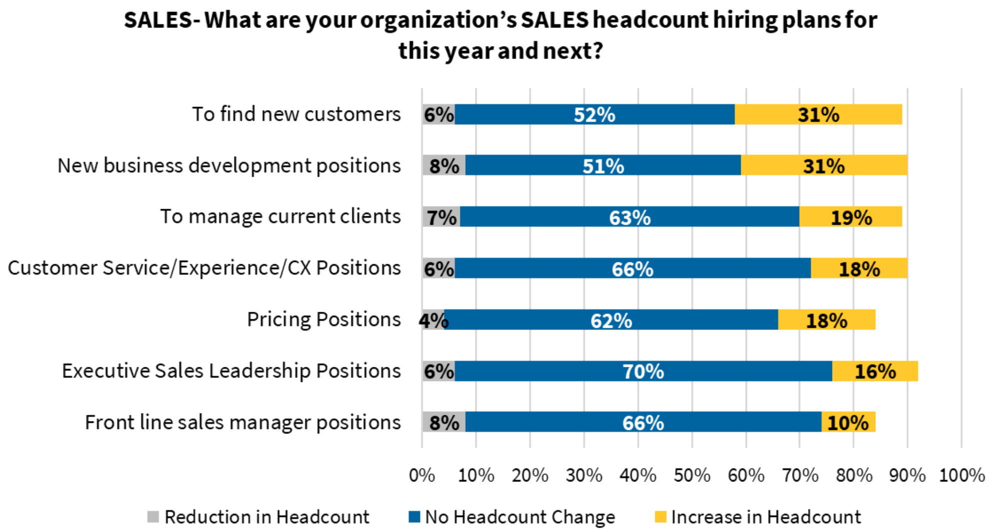
The notable reduction in budget allocations for other categories suggests a strategic reevaluation of spending priorities. Respondents may have opted not to disclose specific figures, reflecting a cautious approach to sharing sensitive financial information. However, the trends are evident: there has been a clear tightening of budgets in areas such as Travel & Entertainment and Professional Development/Training.

As companies streamline their spending in certain areas while investing in innovative solutions, they position themselves for success in an increasingly competitive environment. However, reducing the budget for training and in-person events (travel) may result in some long-term repercussions if there then is a lack of professional development for the sales team.

Most organizations are only investing in headcount to directly find new customers

"New Business Development Positions" and "To Find New Customers" have emerged as the primary focus for hiring in many organizations, with 31% of companies indicating their intention to bolster their teams in these critical areas. The uptick highlights a strategic shift in how businesses are approaching growth and market expansion, recognizing the necessity of dedicated resources to drive new customer acquisition and capitalize on emerging opportunities.

With many markets saturated, having specialized professionals who are skilled in identifying and engaging potential clients can make a significant difference. These new hires can bring fresh perspectives, innovative strategies, and valuable insights that can help companies differentiate themselves and capture market share.

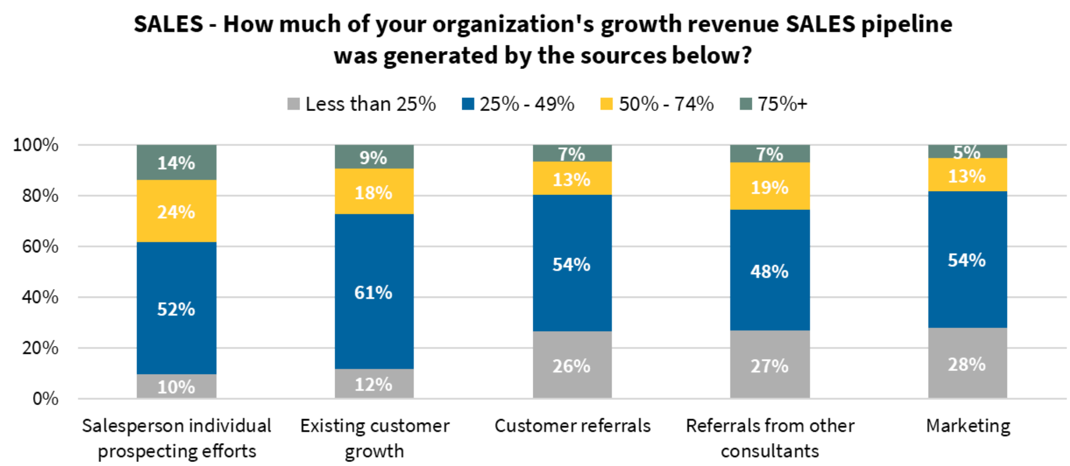


Note: Remaining percents are "don't know/decline to answer"

The rise in companies planning to hire for new business development positions and to find new customers reflects a strategic pivot toward growth and customer acquisition. As organizations recognize the importance of investing in these areas, they are laying the groundwork for a more resilient and competitive future, ultimately positioning themselves to thrive in an ever-evolving business landscape.

The hunt is on for new business

Organizations are currently underleveraging their existing customer base as a means to drive business growth. Respondents attributed customer referrals, referrals from other consultants, and marketing as factors that are perceived as contributing less than 25% to the overall sales pipeline by 26-28%, each, of their overall pipeline. This statistic indicates a missed opportunity for companies to fully capitalize on the relationships they have already established.

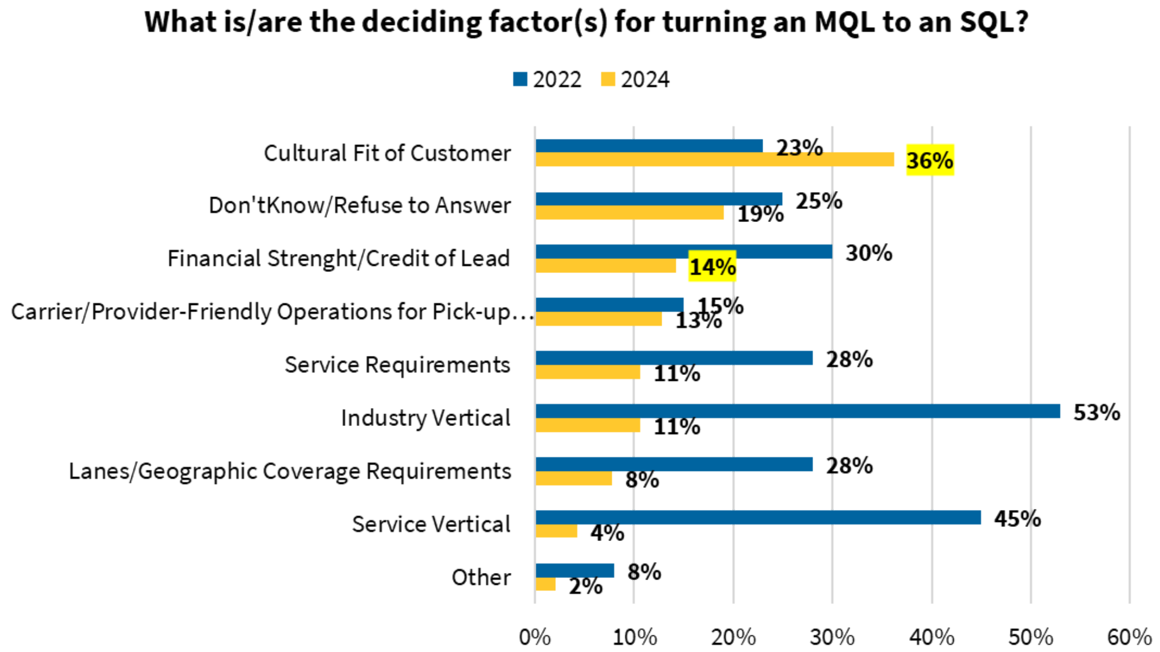


Note: Remaining percents are "don't know/decline to answer"

The relatively low contribution from these areas suggests that many organizations may not be effectively engaging their current customers or utilizing them as advocates for their brand. While new customer acquisition is often prioritized, it's essential for businesses to recognize the value of their existing clientele. Satisfied customers are often the best source of referrals and can serve as powerful promoters for a company.

These findings point to a critical area for improvement: organizations are not fully leveraging their existing customer relationships to drive growth. By enhancing their marketing strategies, fostering deeper connections with current clients, and actively encouraging referrals, companies can unlock new opportunities and create a more robust pipeline that contributes to sustained success. Embracing these strategies not only improves revenue potential, but also strengthens brand loyalty and customer satisfaction.

Cultural Fit and MQL/SQLs



*Carrier/Provider-Friendly Operations for Pick-up and Delivery
Note: Remaining percents are “don’t know/decline to answer”

Among those who do have clear insights of key deciding factors for converting a Marketing Qualified Lead (MQL) into a Sales Qualified Lead (SQL), “Cultural Fit” emerges as the leading factor, cited by 36% of respondents. This suggests that organizations prioritize alignment between potential clients and their internal values and work culture, viewing it as essential for long-term partnership success.

Following Cultural Fit, “Financial Strength” is recognized by 14% of respondents as a crucial factor in the MQL to SQL conversion. This highlights the importance of evaluating a potential client's financial stability when determining whether they are a viable prospect.

Understanding a lead’s financial health not only informs risk assessments, but also helps sales teams gauge the likelihood of successful transactions and ongoing relationships.

Companies may benefit from establishing clearer guidelines and criteria for evaluating MQLs and SQLs, thereby minimizing ambiguity and enhancing the overall effectiveness of their lead conversion strategies. Clearly identifying what department is the owner of the hand-off can go a long way in creating structure and reporting needed to improve the process.

Marketing

Marketing in transportation and logistics is undergoing substantial transformation. The industry is increasingly competitive, with a growing emphasis on digital marketing and data-driven strategies. While these trends present new opportunities, they also pose challenges.

Marketers must navigate the complexities of digital platforms, create engaging content, and leverage data analytics to effectively reach their target audience, even though marketing tends to be a slightly less resourced function with people who are newer to the industry. Looking ahead to 2025, transportation and logistics marketers should focus on building technology capability, understanding customer needs better, and fine-tuning their digital strategies, while creating efficiencies across the board. They should also ensure that brand awareness efforts are aligned with other marketing and business goals.

As the landscape continues to evolve, collaboration across departments will become increasingly vital. Marketing teams must work closely with sales, operations, and customer service to develop a holistic understanding of the customer journey. This alignment can lead to more cohesive messaging and branding, ensuring that customers receive a consistent experience at every touchpoint. Additionally, integrating feedback loops where insights from sales and customer interactions inform marketing strategies can enhance the effectiveness of campaigns.

By fostering a culture of collaboration and communication, transportation and logistics marketers can not only improve their strategies but also create a more agile organization that can swiftly adapt to market changes and customer demands. This integrated approach will be essential for driving long-term growth and a sustaining competitive advantage.

Headcount Remains a Priority in Marketing Budgets

Marketing Budget	2022	2024
Headcount Budget	43%	39%
All Other Marketing Budget	30%	18%
Vendor/Agency Budget	21%	14%

Marketing budget priorities have remained stable since 2022, with "Headcount" continuing to command the lion's share of marketing spend. This consistent focus on staffing showcases the recognition of human capital as a crucial driver of successful marketing initiatives. With 39% of the budget allocated to Headcount, organizations are putting an emphasis on skilled professionals who can navigate the complexities of today's marketing landscape.

Furthermore, the presence of "Director" and "Chief Marketing Officer" roles as the most common high-ranking positions within marketing departments highlights the enduring significance of marketing at the higher level. With 45% of marketing departments boasting a Director or CMO, it's evident that organizations recognize the need for strategic leadership in steering marketing efforts.

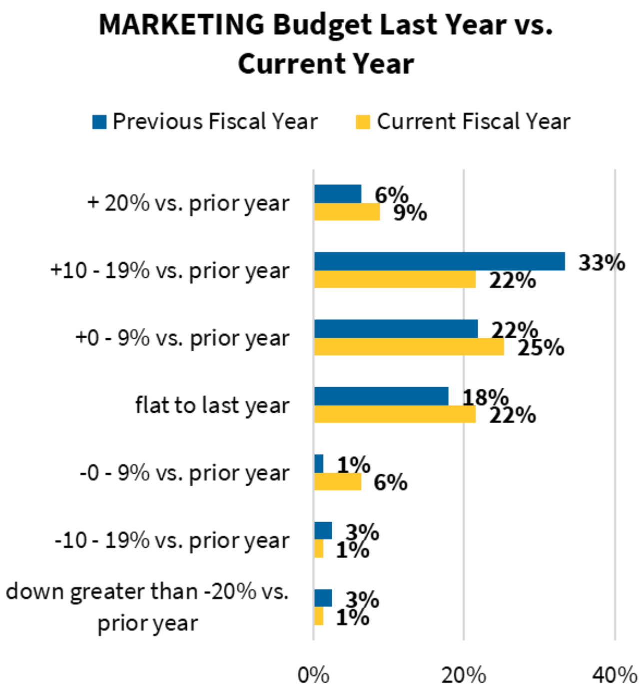
Highest-ranking marketing or communications title within your organization	2022 % of Sample	2024 % of Sample
Director	38%	23%
Chief Marketing Officer	10%	22%
Vice President	23%	13%
Manager	3%	12%
Coordinator	5%	11%
Senior Vice President	5%	6%
Do Not Know/Decline to Answer	5%	5%
Executive Vice President	5%	5%
Founder, Managing Director	0%	1%
Marketing Coordinator - reports to VP of Business Development	0%	1%
Specialist	0%	1%

This representation not only affirms the importance of marketing in achieving business goals, but also facilitates better alignment with overall organizational strategy. However, with a higher level of marketing lead, the cost for that team member also goes up. It can then be on a one-person marketing team to carry the weight of all the initiatives, all at once.

By investing in human resources, companies are better positioned to respond to market demands, leverage data-driven insights, and cultivate meaningful customer relationships.

Note: Remaining percents are "don't know/decline to answer"

Marketing Budgets on the rise



*Includes all salaries, wages, commissions, travel, entertainment, training, etc. (answer in U.S. dollars)

+ Includes headcount. (answer in U.S. dollars)

Note: Remaining percents are “don’t know/decline to answer”

A whopping 56% of respondents report an increase in their marketing budget for the current fiscal year, reflecting a strong commitment to enhancing marketing capabilities and strategies. This rise indicates that organizations are recognizing the critical role of marketing. As businesses invest more in their marketing efforts, they are better positioned to leverage emerging trends, engage with their target audiences, and ultimately achieve their strategic objectives.

In conjunction with this overall budget increase, there’s a notable uptick in the number of marketers with substantial budgets. In 2024, 19% of marketers report having a budget of $1 million or more, up from 15% in 2022. This growth in larger marketing budgets suggests that organizations may be willing to allocate resources to fuel ambitious marketing initiatives. Such investments can empower teams to explore innovative strategies, adopt advanced technologies, and create impactful campaigns that resonate with customers.

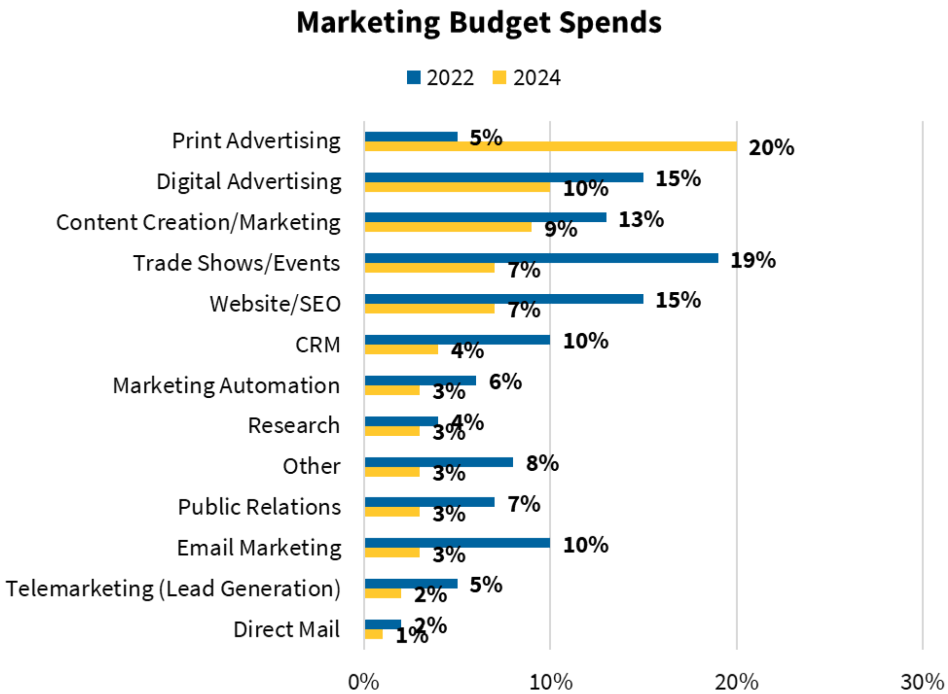
The rise in marketing budgets signals a positive shift toward prioritizing marketing as a key driver of business success, highlighting the growing recognition of its value within organizational frameworks.

Marketing budget spend varies

In 2024, a notable shift in budget allocation has emerged, with organizations earmarking a higher percentage for Print Advertising—20%, up from just 5% in 2022. This increase indicates a resurgence of interest in traditional marketing channels, suggesting that businesses are recognizing the enduring value of print media in reaching certain audiences. As digital noise continues to grow, marketers may be turning to print as a way to cut through the clutter and engage consumers with tangible, high-quality materials. This renewed focus on print advertising could also reflect a strategic decision to diversify marketing efforts and blend traditional and digital tactics for a more comprehensive approach.

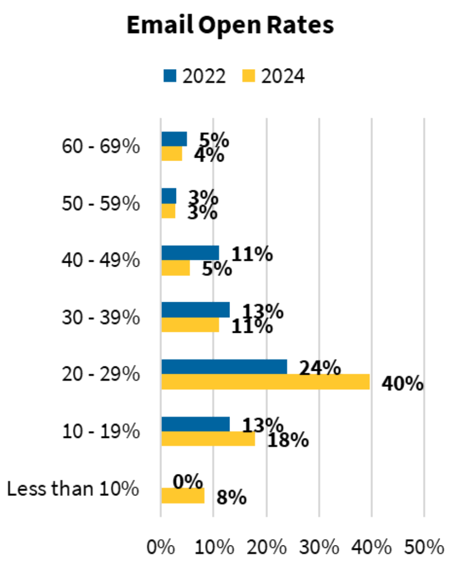
Conversely, there has been a decline in budget allocations for Trade Shows and Events, as well as for Website and SEO efforts, both sitting at 7% in 2024. This decrease suggests a shift in priorities as organizations reassess the effectiveness of in-person events and traditional digital strategies. The reduced investment in Trade Shows and Events may be influenced by the lingering effects of the pandemic, which forced many businesses to adapt to virtual formats and reconsider the return on investment for physical gatherings. Companies also may just be more selective in the events they exhibit at or attend.

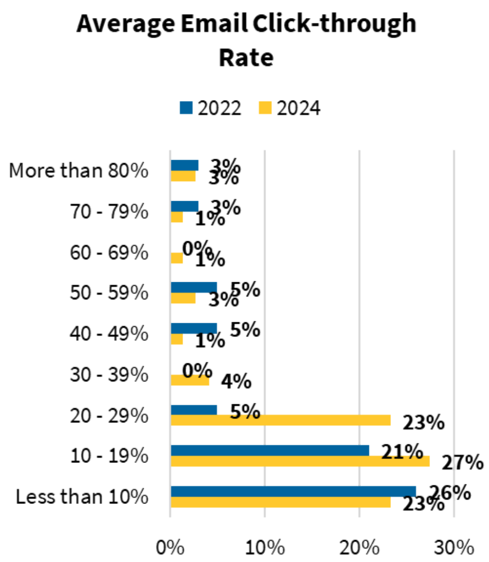
As companies explore more cost-effective and engaging ways to connect with their audiences, they may be opting for alternative strategies that offer greater flexibility and reach.

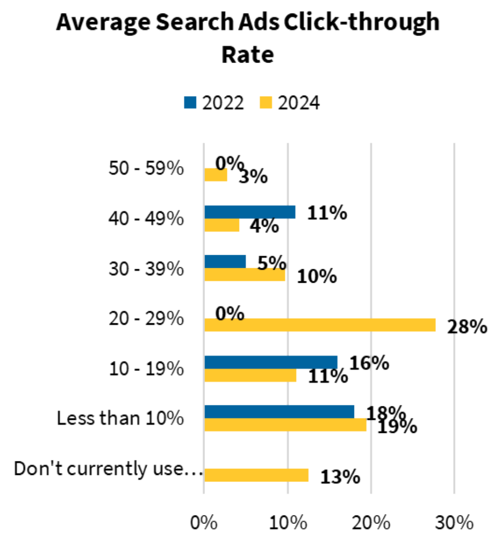


Note: Remaining percents are “don’t know/decline to answer”

Search Ads standout in digital marketing metrics







Note: Remaining percents are "don't know/decline to answer"

Digital marketing metrics have shown consistency year over year, reflecting a stable landscape in many areas of online marketing performance. Key performance indicators such as engagement rates, conversion metrics, and social media interactions have remained relatively steady, suggesting that organizations are effectively maintaining their marketing strategies and optimizing their campaigns for consistent results.

However, one area that stands out for its shift in performance is the success of Search Ads. Search Ads have seen noteworthy changes, indicating a dynamic response to evolving consumer search behaviors and competitive strategies. The increase in effectiveness of Search Ads could be linked to several factors, including advancements in targeting capabilities, improvements in ad copy and design, and enhanced user experience on search engine platforms. As companies adapt to changing algorithms and consumer preferences, they are likely discovering new ways to leverage Search Ads more effectively, driving higher engagement and conversion rates.

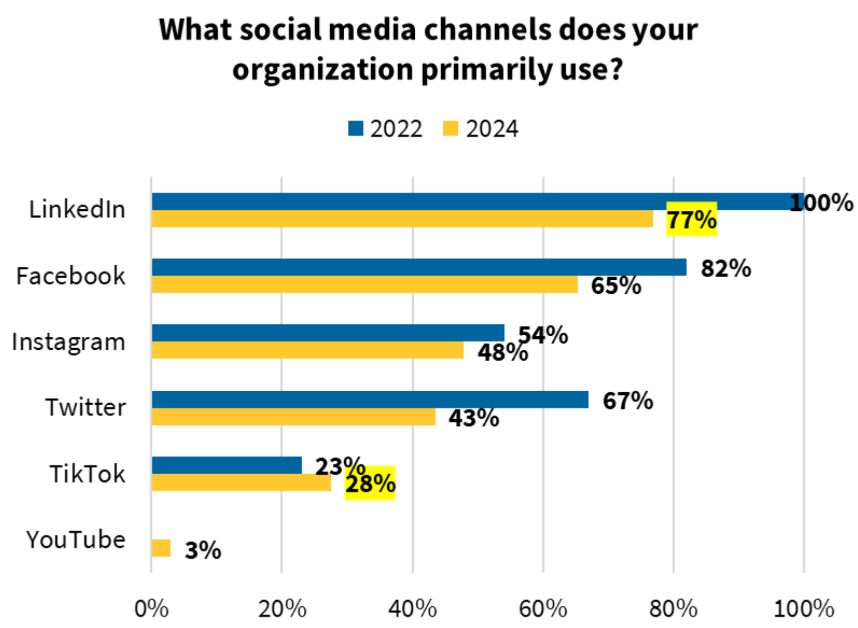
Social Media Platform Use

LinkedIn continues to hold its position as the leading social media platform for marketers in the transportation and logistics industry, but its dominance has slightly waned. In 2024, 77% of respondents reported using LinkedIn, a serious drop from its universal adoption rate of 100% in 2022. Despite this decline, LinkedIn remains the go-to platform for B2B marketing, offering unparalleled opportunities for professional networking, industry insights, and targeted lead generation.

The drop in LinkedIn usage could signal a broader shift in how companies allocate their social media resources. While LinkedIn remains highly effective for fostering business relationships and promoting thought leadership, the rise of newer, more dynamic platforms like TikTok, as well as the increasing appeal of other digital marketing strategies, may be contributing to this shift.

Facebook, once the cornerstone of social media marketing strategies, has seen its appeal wane as younger audiences migrate to newer platforms and as concerns over privacy and data usage persist. Similarly, Twitter/X's usage has dropped, potentially reflecting a shift in how businesses view the platform's value for customer engagement and brand-building, especially in light of controversies and changes to its structure over the past couple of years.

On the other hand, TikTok has continued its meteoric rise, growing steadily in 2024 with 28% of respondents now using the platform, up from 23% in 2022. This is a remarkable leap from its presence in the 2020 Benchmarking Study, where TikTok was not even an option to select. The platform's rapid growth has been driven by its ability to capture the attention of younger, tech-savvy consumers and its innovative, short-form video content format, which offers marketers a creative and engaging way to communicate their brand messages.



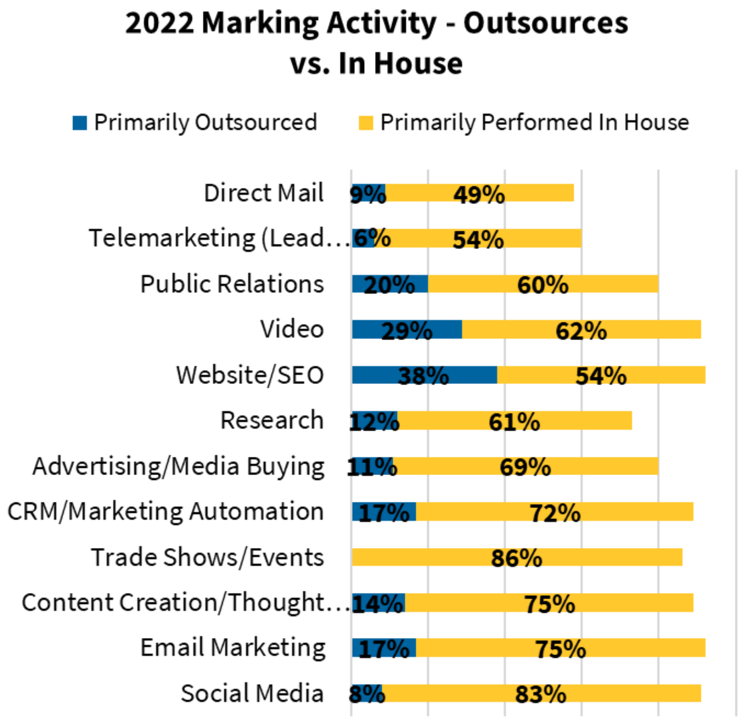
Note: Remaining percents are "don't know/decline to answer"

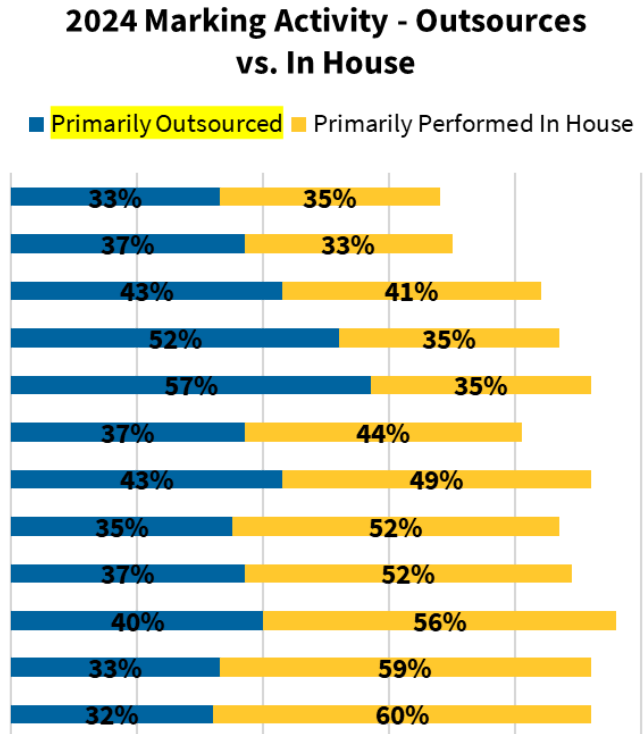
Outsourcing increases, but in-house still dominant

In 2024, outsourcing in marketing has seen a noticeable increase compared to 2022, signaling a shift in how organizations are managing their marketing efforts. Despite this trend, a majority—67%—of marketing activities are still being handled primarily in-house. This underscores a continued reliance on internal teams to execute key marketing strategies, even as companies begin to explore outsourcing options to augment their capabilities.

One of the key reasons for this balance between in-house and outsourced marketing is the staffing structure within many organizations. With 51% of companies reporting that they have only one full-time employee (FTE) responsible for multiple marketing functions, the demand for external support is becoming increasingly apparent. Outsourcing offers a way to bridge the gap, enabling organizations to handle essential tasks like content creation, SEO, and digital advertising without overwhelming their limited internal resources. However, the continued reliance on in-house teams highlights the importance of internal expertise and the trust organizations place in their own people to steer brand strategy, customer engagement, and overall marketing direction.

As companies look toward the future, a hybrid approach that leverages both in-house talent and outsourced expertise may become the norm, allowing organizations to maximize efficiency and stay agile.





Note: Remaining percents are “don’t know/decline to answer”

Full list of marketing initiatives tracked for ROI

Note: Remaining percents are "don't know/decline to answer"

In today's marketing landscape, marketers are better able to correlate initiatives and results, creating a better way to prove ROI on campaigns, and to determine what is driving real value.

The top areas where companies measure results are:

1. Websites/SEO – Leading with 54%, websites and SEO are the most-tracked areas, reflecting the importance of online visibility.
2. Email Marketing – 49% track email marketing, highlighting its effectiveness in generating leads and nurturing customer relationships.
3. Trade Shows/Events – At 46%, trade shows and events still provide significant ROI, showcasing the value of in-person interactions.
4. Social Media – 44% focus on social media tracking, emphasizing its role in building brand awareness and engagement.
5. Digital Advertising – 42% track digital ads, benefiting from immediate, measurable outcomes.
6. Content Marketing & CRM/Marketing Automation – Both tracked by 36%, these areas are crucial for driving engagement and automating outreach.

Other methods like Telemarketing (24%), Print Advertising (22%), and Video (20%) also contribute to the marketing mix, while traditional tactics like Public Relations, Research, and Direct Mail still play a role for select organizations.

Respondent Demographics

This Benchmarking Study, conducted by PATH Growth on behalf of the Transportation Marketing & Sales Association (TMSA), received 176 survey responses—the largest number in the history of this study. This strong sample size provides valuable insights and represents a major milestone for the research.

This year's respondents were more evenly distributed across various roles compared to previous years. A total of 32% hold positions in marketing leadership, while 24% are involved in HR/driver recruiting and retention. Additionally, 20% are in corporate management, with another 20% in marketing operations. Sales leadership accounts for 19% of participants, followed by 15% in corporate communications and 13% in sales operations. This balanced representation offers a broader perspective across key areas of the industry.

Time in Current Position	Percent of Sample
2 - 5 years	41%
5 - 10 years	35%
0 - 2 years	14%
10 - 20 years	6%
20+ years	4%

Experience in Industry	Percent of Sample
5 - 10 years	36%
2 - 5 years	30%
20+ years	15%
10 - 20 years	13%
0 - 2 years	7%

Respondents’ Organization Demographics

A substantial portion of respondents (56%) represent companies with operations limited to the U.S., while 22% have a broader reach across North America, including the U.S., Canada, and Mexico. An additional 12% operate exclusively within the U.S. and Canada. The majority of participating companies are privately held (63%), compared to 32% that are publicly traded, and 3% that are non-profit organizations.

Respondents in this survey represented a broad spectrum of industries. The largest share, 56%, came from the automotive sector, followed by 38% from non-food consumer products, 36% from the food and beverage industry, and 32% from retail. Other key sectors included industrial manufacturing (27%), computers and electronics (22%), health care (22%), chemicals (18%), energy (12%), and government/public sector (10%). This range of industries provides a comprehensive view of the market dynamics impacting respondents' organizations.

There was also a diverse range of respondents from various company types in this survey which you can review below.

Type of Organization	Percent of Sample
3PL/IMC/Freight Forwarder/Truck Broker	57%
Motor Carrier	13%
Consultant	10%
Air Carrier	10%
Technology	5%
Association/Education	5%
Warehousing/Fulfillment	4%
Manufacturer	3%
Energy	3%
Parcel/Home Delivery/Last Mile	2%
Financial/Freight Payment	2%
Government	2%
Marine Port	2%
Don’t Know/Decline to Answer	2%
Railroad	1%
Integrator	1%
Leasing	1%
Ocean Carrier	1%

Respondents’ Organization Demographics

The majority of participating companies are businesses with less than 500 employees and with more than $5 million in annual revenue. See the full breakdown below.

Number of Employees	Percent of Sample
SMB Enterprise (100 - 499 employees)	39%
Micro Enterprise (Less than 50 employees)	19%
Small Enterprise (50 - 99 employees)	17%
Medium Enterprise (500 - 1,000 employees)	12%
Large Enterprise (1,000 - 4,999 employees)	11%
Giant Enterprise (More than 10,000 employees)	2%
Major Enterprise (5,000 - 9,999 employees)	1%

Approx. Annual Revenue of Recent Fiscal Year	Percent of Sample
More than $5 million but less than $100 million	25%
More than $100 million but less than $500 million	21%
More than $2.5 billion but less than $5 billion	17%
Less than $5 million	13%
More than $500 million but less than $1 billion	9%
Don’t Know/Decline to Answer	8%
More than $1 billion but less than $2.5 billion	5%
More than $5 billion	2%

Acknowledgements

TMSA

The Transportation Marketing & Sales Association (TMSA) is the place for sales and marketing professionals in transportation and logistics to unite, grow and advance. TMSA is the only association serving marketing, communications and sales executives in all market segments of transportation and logistics. Members of the TMSA generate more than $500 billion in revenue and count on the TMSA to guide their marketing and sales efforts to increase their revenue by benchmarking industry standards.

PATH

PATH is a data-driven consulting firm that helps companies make the best growth decisions by focusing on the most important element of business: People. They use data to understand what is really going on in the market and make confident decisions for the growth of your business. PATH helps you identify, solve, and act by bringing data to life. By linking experiences to strategy and research they can build bridges between customers, your team, and leadership to create positive and lasting connections.
