THE BOSTON CONSULTING GROUP

A Disconnect and a Divide in Digital-Marketing Talent

Commissioned by Google

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AT A GLANCE

There's a continuing digital disconnect in corporate marketing departments—and a widening digital divide as well.

The Disconnect

Advertisers ascribe high importance to digital-marketing capabilities, but in our latest survey, their average digital-skills score was exactly the same as it was 18 months ago.

The Divide

Agencies see themselves as in better—while not great—shape, even if their clients do not necessarily agree. The gaps between advertisers and agencies in certain key areas are considerably wider than in the overall scores.

The Challenge

Unless advertisers improve their performance, they will need to outsource campaign development and execution, for which they will pay a heavy price in terms of consumer engagement. To add the most value, agencies need to improve their own capabilities, but the bigger opportunity lies in building long-term partnerships with their clients based on the development of mutual skills.

THERE'S A CONTINUING DIGITAL disconnect in corporate marketing departments—and a widening digital divide as well. CMOs and others with marketing responsibility should take note.

Many companies have refocused their marketing functions on a digital or an omnichannel approach. But too many appear to be spending more on digital without building up the capabilities that produce bang for the digital buck. In late 2016, in collaboration with Google Digital Academy, BCG surveyed some 2,200 marketers at 141 advertisers, and 2,900 employees at 126 advertising agencies, on their organizations' digital-marketing capabilities and learning and development efforts. (See the sidebar below.) The results were surprising—and not in a positive sense.

The disconnect: Advertisers ascribe high importance to such capabilities as digital-content development and to fast-rising digital channels such as mobile advertising. Despite this, we found that not much has changed since 2015, when we conducted an initial survey of 1,100 marketers at 57 companies. (See *The Talent Revolution in Digital Marketing*, BCG Focus, September 2015.)

Our latest survey found that on our Digital Capabilities Index (DCI), a 100-point scale (with 100 indicating best practice), the average score was 57—exactly the same as it was 18 months ago. (See Exhibit 1.) Two-thirds of advertisers scored 60

ABOUT THIS REPORT

With the rapid growth in digital spending and the increasing impact of digital channels on consumers, it's more important than ever for marketing organizations to understand where and how they can most effectively influence consumer behavior.

In 2016, Google again commissioned BCG to assess the current state of digital skills in marketing organizations. The findings outlined here were discussed with Google executives, but BCG is responsible for the analysis and conclusions.

We surveyed some 2,200 marketers (including digital specialists, brand managers, customer marketers, and public relations practitioners) at 141 advertisers in 41 countries (Australia, Austria, Belarus, Belgium, Brazil, Bulgaria, Canada, Chile, Colombia, Denmark, Finland, France, Germany, Greece, Hungary, India, Indonesia,

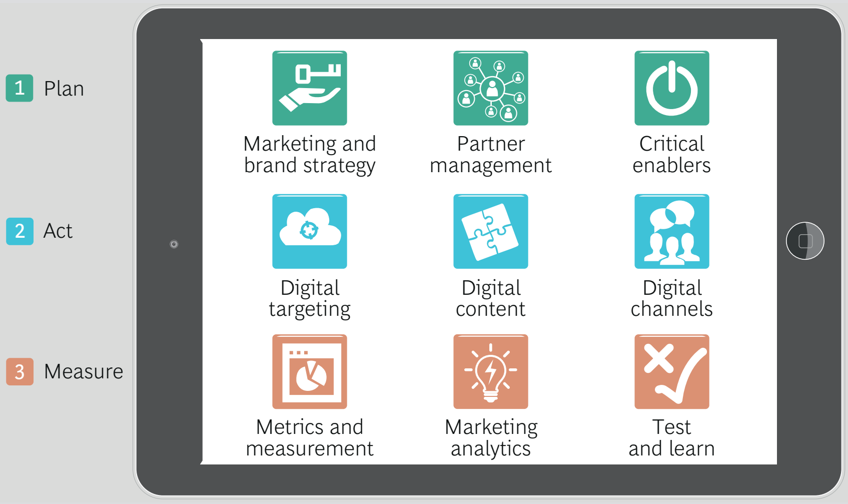
ABOUT THIS REPORT
(continued)

Italy, Ivory Coast, Japan, Latvia, Luxembourg, Mexico, Morocco, the Netherlands, Norway, Poland, Romania, Russia, Singapore, Slovakia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey, the United Kingdom, the United States, Venezuela, and Vietnam) on their organizations' digital-marketing capabilities and learning and development efforts to understand how they rate their marketing organizations against digital-marketing best practices. Participating companies were from the retail, consumer products, financial services, and technology, media, and telecommunications industries, as well as from public-sector, education, and not-for-profit organizations. Our research also included 2,900 employees at 126 advertising agencies in 28 countries.

We asked marketers to assess their organizations' capabilities across a digital-marketing framework comprising nine categories of skills. (See the exhibit below.) The first three categories are related to planning: marketing and brand strategy, partner management, and critical organization enablers. The next three involve execution: digital targeting, digital-content development and distribution, and expertise in seven digital channels (search, websites, display media, mobile advertising, mobile web and applications, social media, and video). The final three skill categories relate to measurement: metrics and measurement, marketing analytics, and testing.

Marketers rated their teams' current capabilities and performance in each skill and in each of the seven digital channels on a scale from one to six. We then turned the responses into an index, with 100 equaling best practice.

Digital-Marketing Skills Framework



Source: BCG analysis.

or lower, but the actual numbers are less important than the lack of any demonstrable improvement. The results were consistent across all the countries surveyed.

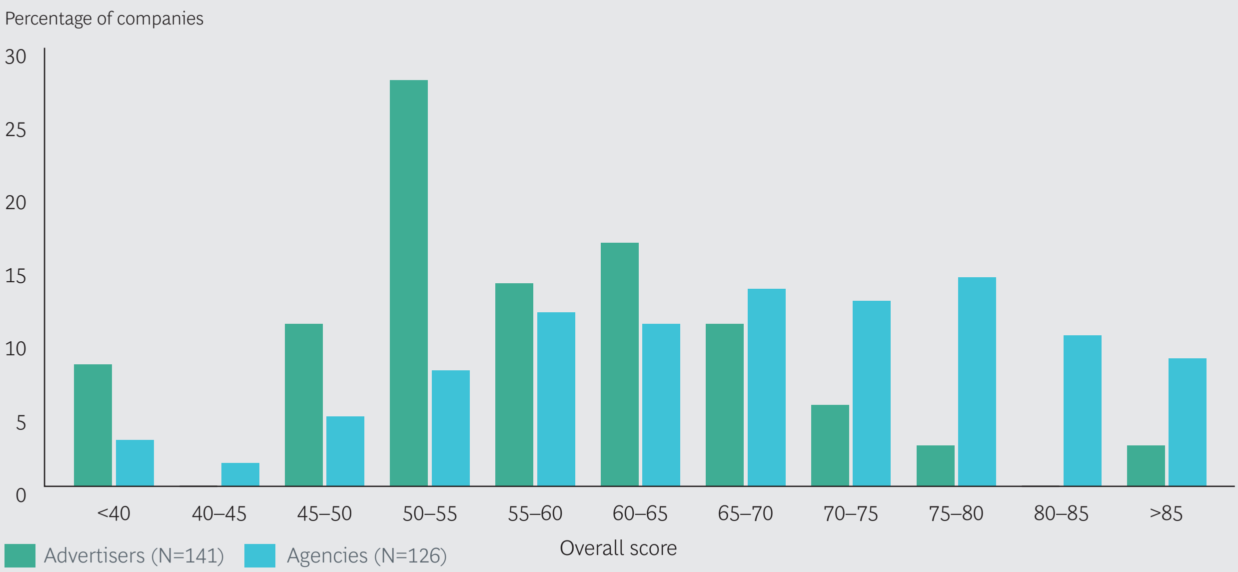
The divide: Agencies are in better—while not great—shape, with an average score of 68. About two-thirds of agency respondents ranked their organization's digital skills at 65 or higher, far from a best-practice 100, and there were some noticeable weaknesses in the mobile and video channels, among other areas. Perhaps more important, the differences between advertisers and agencies in certain key areas, such as digital targeting and mobile and video, are considerably wider than in the overall scores. For example, in mobile advertising, agencies scored 62 while advertisers scored 45. In digital targeting, agencies scored 67, advertisers 53. (See Exhibit 2.)

The current situation presents both sides of the digital-marketing partnership with questions about how they should work together going forward. Advertisers, in particular, need to build up their digital capabilities in order to improve their own performance and guide their agencies' work effectively.

Big Money and Fast-Paced Change

Spending on digital channels continues to rise. At the end of 2016, global spending on digital advertising was set to top $180 billion, according to Magna Global, which projects double-digit growth through 2020. Digital channels now represent a third of all advertising spending worldwide; this year, they will overtake TV, driven by the strong growth of social media and video. Advertisers are buying more digital services from agencies: digital's share of agency revenue passed 40% in 2015. And agencies are responding to the demand. According to *Advertising Age*, in December

Exhibit 1 | Advertiser and Agency Scores on the Digital Capability Index



Source: BCG Talent Revolution Survey, 2016.

EXHIBIT 2 | Advertisers and Agencies: Specific Digital Capabilities

		Advertisers	Agencies
Plan	Marketing and brand strategy	60.5	70.4
	Partner management	53.8	no data
	Enablers	61.4	70.7
Act	Digital content	55.8	67.0
	Digital targeting	53.3	67.2
	Channels	57.1	67.6
	Search	65.5	74.8
	Website	63.1	67.5
	Display media	55.9	68.7
	Mobile advertising	45.0	62.4
	Mobile web and apps	51.1	59.5
	Social media	66.6	76.8
	Video	52.1	63.1
Measure	Metrics and measurement	60.6	69.6
	Marketing analytics	59.7	70.4
	Testing	49.8	59.5
	OVERALL DCI SCORE	**56.9**	**67.8**

45–55 56–60 61–77

Source: BCG Talent Revolution Survey, 2016.

2015, US agency employment reached its highest point since the dot-com bubble of the late 1990s—almost 200,000 people.

Digital and mobile channels and advanced marketing techniques, such as digital targeting and data analytics, are reshaping consumers' purchase pathway for companies in all industries, from travel and hospitality to consumer products and retail to financial services. Different channels increasingly require different content, and the more advanced marketers are using technology to actively shape consumers' cross-channel experience of their brands and products. (See, for example, *Travel Innovated: Who Will Own the Customer?,* BCG Focus, January 2016*; How Digital Delivery Puts the Restaurant Value Chain Up for Grabs*, BCG Focus, January 2017; *The Winner-Take-All Digital World for CPG*, BCG Focus, March 2016; and "Digitizing Customer Journeys and the New Insurance IT Model," BCG article, August 2016.) The risk for many advertisers is that they keep falling further behind, as we emphasized in 2015, since digital technologies and the complexity of their application are advancing at dizzying speed. While many companies are struggling to develop digital content and employ social media, digital marketing is already moving toward new capabilities. The most significant may be personalization, marketing to individual consumers at scale. (See, for example, "It's High Time Airlines Got Personal," BCG article, August 2016.)

It's particularly surprising that advertisers and agencies continue to give themselves low scores on testing (50 and 60, respectively), since testing, learning, and adjusting the campaign approach or design are among the most powerful capabilities enabled by digital technologies. The ability to see what is working and what is not, and to experiment almost in real time with adjustments and improvements, is essential to using digital channels effectively. This is especially true in fast-growing channels that are also evolving at a rapid pace, such as mobile web and apps, in which both advertisers and agencies—perhaps not surprisingly—also score poorly (51 and 60, respectively).

Marketers are still using new and advanced tools in old-fashioned ways.

In another area of fast-rising importance—video—the data shows a specific disconnect. While a good number of agencies and some advertisers reported that they understand the role of video in the consumer journey, they are still mostly putting existing TV assets online and not investing in the digital capabilities that make online video a more effective medium than TV. Too few companies, for example, create more than one video per campaign, tailor their video creatively to fit consumers' use of different devices and digital platforms, or make use of such tools as hotspots and sequential retargeting to keep consumers engaged with their brands. In other words, marketers are still using new and advanced tools in old-fashioned ways.

Advertiser Inertia

Given the pace of technological change and the growing influence of digital technologies throughout the marketing function, we expected advertisers to show material improvement in our 2016 survey—the kind that would indicate that they are moving in the right direction, if still getting up to speed. Instead, we found more inertia than action (although there certainly are exceptions). We see at least four reasons:

- **Lack of Understanding.** Our survey surfaced indications of a lack of understanding at senior levels of marketing management about the strength of companies' digital capabilities. Across all three phases of the marketing function—planning, executing, and measuring—senior managers consistently rated their departments' capabilities higher, and often significantly higher, than junior executives did. (See Exhibit 3.) For example, marketing and brand strategy capabilities were assigned a rating of 66 by the most senior managers, compared with 58 by junior managers, while digital-content capabilities were rated 63 versus 55, respectively, and metrics and measurement were rated 70 versus 57. It would appear that the ground-level view, if not more realistic, is at least more skeptical. It also bears remembering that junior executives are likely to be younger and, because they grew up in a digital world, more knowledgeable and sophisticated about how digital marketing works.

EXHIBIT 3 | Advertiser DCI Scores by Position in the Company

		EVP/GROUP DIRECTOR	SVP/ DIRECTOR	SENIOR BRAND MANAGER	JUNIOR/ ASSISTANT
PLAN	Marketing and brand strategy	66.3	62.3	60.4	57.8
	Partner management	59.3	57.4	52.0	52.5
	Enablers	69.6	62.2	59.1	60.5
ACT	Digital content	62.7	57.3	54.6	54.6
	Digital targeting	58.4	53.6	53.4	50.7
	Channels	60.8	57.6	56.3	55.1
	Search	70.4	65.7	66.7	59.3
	Website	66.2	62.3	60.6	62.6
	Display media	63.4	57.4	55.9	54.4
	Mobile advertising	50.4	47.6	43.7	42.3
	Mobile web and apps	50.8	51.9	50.0	49.5
	Social media	68.9	64.9	66.0	66.6
	Video	55.8	53.4	51.1	51.1
MEASURE	Metrics and measurement	70.2	60.7	61.3	57.1
	Marketing analytics	61.7	56.4	59.8	58.2
	Testing	53.4	51.0	49.5	46.1
	OVERALL DCI SCORE	**62.5**	**57.6**	**56.3**	**54.7**

42–52 53–56 57–71

Source: BCG Talent Revolution Survey, 2016.

- **Lack of Vision.** Advertisers gave themselves a DCI rating of only 60 on their ability to build digital strategies and plans. They are especially weak in mapping the consumer journey, tailoring content to match the stages of that journey, using ROI metrics to adjust the marketing mix across channels for greater impact, and measuring the effects of their campaigns on actual business outcomes such as sales.

- **Lack of Organizational Support.** Advertisers recognize that they are weak in attracting and retaining critical digital talent (a DCI score of 56). They also do not see digital marketing receiving the support it needs from other functional areas of their organizations, such as finance, legal, and IT. And they fault marketing technology platforms for not enabling them to make the most of consumer data.

- **Lack of Assessment.** Measurement is a continuing area of weakness. Companies scored no higher than 61 on their ability to gain access to and derive insight from data, choose the right metrics and targets, and measure campaigns effectively. (See "Making Sense of the Marketing Measurement Mess," BCG article, February 2017.)

Since our survey was a self-assessment, advertisers and agencies that are behind the curve may not be aware of how much they lag or why. But whatever the reasons for a company's failure to make progress, lack of talent, in particular, hurts its ability to plan, execute, measure, and improve digital campaigns. As a result, many companies either mount subpar campaigns or rely on the support of their agencies to plan the work, do the work, and measure the results. So far, it appears that many are following the second course—outsourcing campaign development and execution, just as they have long outsourced creative development and media buying.

Those that outsource pay a big price—in more than just agency fees and commissions. Digital campaigns are different from their offline equivalents. They are continually modified and adjusted in real time based on real-time results. Marketers that are not actively involved in the test-learn-adapt process lose touch with both their campaigns and their digital consumers. They don't know whether their strategies are being faithfully executed or how their budgets are being spent. They are hard-pressed to explain how or why success—or failure—occurred. And perhaps most critically, they don't learn how to access and use the plethora of digital data that campaigns generate—the data that makes more advanced techniques, such as personalized outreach, possible.

Marketers that are not actively involved in the test-learn-adapt process lose touch with both their campaigns and their digital consumers.

Advertisers face another skills-related challenge. Unless they improve their performance and their learning and development, the digital divide is set to widen. These companies will find it increasingly difficult to attract technical talent as they compete for skills not only with agencies but, more significantly, with digital natives, tech startups, and other organizations. Since talent attracts talent, it will become harder and harder for advertisers that lack technical skills to fill the void.

Agency Opportunity

All of this spells opportunity for agencies, with the caveat that they need to raise their own game as well. That agencies gave their capabilities a higher rating than advertisers did makes sense (this is their core business, after all), but the fact that they assign themselves DCI scores in only the 60s and 70s in most areas of development and execution should be a cause for concern. Agencies do have an opportunity to increase billings by compensating for their clients' weaknesses, but to add the most value, they need to improve their own skills in several key areas, starting with mobile and video. These channels are critical now, and their importance will only increase in importance. Testing is another area of weakness. The ability to test and adjust creative content and campaign formats and methods is one of the biggest advantages that digital technologies provide marketers. Yet both advertisers and agencies give themselves poor grades in how they test content, creative materials, targeting options, and offline content (such as TV commercials on YouTube). (See the appendix.)

The bigger opportunity for agencies lies in building long-term partnerships with their clients. These partnerships should be based on the development of joint skills enabling the design and execution of digital campaigns that can further continuing consumer relationships and engagement both online and offline. Such campaigns are the ultimate promise of digital marketing, but so far they are more the exception than the rule. The data suggests some reasons why.

Agencies scored relatively high in critical campaign design capabilities such as these:

- Building a deep understanding of consumers by connecting data from diverse sources
- Having a clear and up-to-date map of consumer journeys related to the client's brand or product category
- Knowing which digital touch points are the most critical to specific marketing objectives

Agencies also believe they are good at developing digital-content strategies that tailor content to key moments in the consumer journey and at translating marketing objectives into a set of actionable metrics.

Advertisers, in contrast, scored themselves considerably lower on these campaign-building components. This suggests that agencies are doing an inadequate job of conferring their campaign skills on their clients. Moreover, agencies have not impressed their clients with the quality and extent of their capabilities. Advertisers consistently rate their agencies (and themselves) in the low- to mid-50s on the DCI for these attributes:

- Being at the cutting edge of marketing in a digital world (in both a media and creative context)
- Being clear on how agencies' specific roles affect the overall success of the campaign
- Orchestrating agency partners so that they work as one team

The bigger opportunity for agencies lies in building long-term partnerships with their clients.

Part of the reason for these low ratings may have to do with incentives. Advertisers gave themselves a rating of only 45 on whether "campaign outcomes are a critical component of how we reward our partners."

Agencies have the lead, for now at least, in digital-marketing skills and capabilities. Smart agency heads will resist the temptation to use this advantage to maximize near-term agency revenues by taking over more and more of their clients' campaign work. Instead, they will field multiskilled teams that work with clients to design and execute orchestrated campaigns that achieve measurable results, and in this way, build long-term digital-marketing partnerships that work.

Appendix: DCI Scores by Capability

	ADVERTISERS	AGENCIES
MARKETING AND BRAND STRATEGY	**60.5**	**70.4**
CLEAR UNDERSTANDING OF CONSUMER		
We connect data from a diverse set of sources on consumers and their activities to build a deeper understanding of them	71.2	78.8
We have a clear and up-to-date map of consumer journey(s) related to our brand or product category	60.9	70.1
Our consumer journey map(s) capture all online and offline touch points	51.4	60.8
We know which digital touch points are the most critical moments for our specific marketing objectives	64.1	73.7
ABILITY TO BUILD AND EXECUTE SUCCESSFUL CROSS-CHANNEL PLANS		
We build successful cross-channel marketing plans based on our understanding of critical touch points	60.6	74.5
Our digital-content strategy ensures that we tailor digital content for the key moments in the consumer journey	56.5	72.0
We translate our marketing objectives into a set of actionable metrics	68.1	74.6
DATA-DRIVEN TRADEOFFS BETWEEN CHANNELS		
We use robust ROI models to optimize our marketing mix across all channels (digital and traditional)	56.7	61.2
We allocate resources across digital channels based on a clear understanding of the value and cost of each digital channel	61.7	73.4
We measure the impact of digital advertising based on a robust attribution model	53.4	64.8
PARTNER MANAGEMENT	**53.8**	
RIGHT PARTNERS WITH THE SAME GOAL		
Our media agency partners are at the cutting edge of marketing in a digital world	55.5	
Our creative agency partners are at the cutting edge of marketing in a digital world	51.4	
We have the right combination of agency partners to deliver our campaign targets effectively	54.2	
ESTABLISH ACCOUNTABILITY AND ALIGN INCENTIVES		
Our agency partners are clear on how their specific role impacts the overall success of the campaign	54.5	
We are able to orchestrate our agency partners so that they work as one team	52.5	
We confidently challenge our partners to ensure that we get the best out of them	63.3	
Overall campaign outcomes are a critical component of how we reward our partners	45.1	
ENABLERS	**61.4**	**70.7**
SENIOR LEADERSHIP		
Our senior leaders emphasize the importance of adapting marketing to a digital world	75.6	83.4
Our senior leaders empower us to challenge established models	69.5	76.5
Our senior leaders have provided resources/investment/shelter for marketing innovations (e.g., testing and nurturing new marketing models)	63.8	68.7

	ADVERTISERS	AGENCIES
STRUCTURE AND TALENT		
Our marketing structure enables us to deliver well-coordinated cross-channel communications	60.3	
Other business functions (e.g., finance, IT, legal) give us the support we need to succeed in our rapidly changing marketing environment	55.5	
Our marketing teams are able to attract and retain critical digital talent	56.3	64.8
CONTINUOUS INVESTMENT		
We are investing sufficiently in marketing capabilities to embrace changes in the digital space	59.3	67.6
Our marketing technology platforms allow us to make the most of our consumer data	51.1	62.9
CHANNELS	**57.1**	**67.6**
SEARCH	65.5	74.8
We build our keyword strategy on our understanding of what keywords consumers use	68.9	77.5
We optimize paid search based on signals such as device, location, time, and remarketing	61.5	74.5
We continuously measure paid search performance and optimize accordingly	68.1	74.8
Our paid search advertising budget can be varied according to returns	63.4	72.5
WEBSITE	63.1	67.5
We fully understand the role our website plays in our consumers' journey (both on- and offline)	69.5	65.9
Our website is designed and optimized to deliver a great experience across multiple devices (e.g., desktop, smartphone, tablet)	65.4	71.5
We ensure that our website is fully search optimized at all times	62.2	69.3
Our website serves differing consumer needs across different visits effectively	55.5	63.5
DISPLAY MEDIA	55.9	68.7
We fully understand the role that display media plays in our consumers' journey	61.1	74.1
We use a range of data signals (e.g., interests, retargeting, search, social) to target our display ads to the right people at the right time	60.8	74.8
We use a range of data signals to tailor display ad content	51.7	68.8
We buy a significant proportion of our display ads using programmatic and real-time bidding technology	50.2	57.1
MOBILE ADVERTISING	45.0	62.4
Our mobile strategy is based on a clear understanding of mobile's role in the consumer journey	53.3	64.7
We effectively use location-based data in our mobile campaigns	39.1	62.3
We use data to effectively attribute the value of mobile and determine the right spending levels	42.7	60.2
MOBILE WEB AND APPS	51.1	59.5
Our mobile website experience is optimized for how consumers choose to use it	56.0	64.1
We fully understand the role that apps play in our consumers' journey	51.3	62.5
All the apps we build have a clear functionality/purpose that supports our product/service offering	46.2	52.1

	ADVERTISERS	AGENCIES
SOCIAL MEDIA	66.6	76.8
We fully understand the role that social media plays in our consumers' journey	69.0	80.2
We are able to pick the most influential social media platforms to deliver our campaign objectives	68.8	80.2
We have created a consistent social media voice for each brand across platforms	62.3	71.3
We use social media to raise brand awareness through a variety of strategies (e.g., using key influencers, paying for ads)	66.5	75.7
VIDEO	52.1	63.1
We fully understand the role of video in our consumer journey	62.0	75.2
We plan across online video and TV together in order to deliver our campaign objectives	53.6	60.4
We are able to pick the most effective video advertising platforms to deliver our campaign objectives	52.8	66.6
We tailor our video creative to fit the consumer's use of the device and digital platform	48.3	57.3
We create more than one video and use technology (e.g., hotspots, sequential retargeting) to keep consumers engaged with our brand	43.7	56.0
DIGITAL CONTENT	**55.8**	**67.0**
CONTENT CREATION		
We consider multiple sources to develop our creative content (e.g., create ourselves, co-create with media partners, curate content from others)	64.9	73.8
We optimize and improve our content with content analytics (e.g., measuring content quality and audience engagement with clear success metrics)	53.8	69.1
We are actively building content development capabilities (more investment/ supporting agencies/different ways of working/finding new partners)	57.4	67.7
Our video content is designed to work best online	51.7	60.8
CONTENT DISTRIBUTION		
We have a media plan designed to ensure that our content is seen by the right audience	56.6	68.8
We use tools and technology (e.g.,"dynamic insertion") to make our content relevant to consumers and to where they are in their journey	45.1	57.7
Our content is optimized to run on all relevant devices and platforms	60.9	70.7
DIGITAL TARGETING	**53.3**	**67.2**
We convert our ideal consumer segments into targetable profiles based on digital-audience data (e.g., behavior on website, search, social, video)	53.2	67.4
We continuously optimize our targeting based on performance throughout the campaign	57.2	70.6
We use data gathered in one channel (e.g., video/website/social) to remarket to consumers in other channels (e.g., search/display)	53.5	69.4
We maintain "one view of the consumer" across digital devices and platforms	49.1	61.4
METRICS AND MEASUREMENT	**60.6**	**69.6**
CHOOSING THE RIGHT METRICS AND TARGETS		
We pick digital metrics that are good proxies for our marketing objectives	60.5	71.3
Our digital-campaign targets are informed by best practices and historical benchmarks	62.0	70.3

	ADVERTISERS	AGENCIES
MEASURE EFFECTIVELY AND OPTIMIZE		
We are set up to gather these metrics from a wide range of channels (e.g., website, search, social, and video analytics set up, tagging done, programmatic buying systems in place)	60.2	67.1
We track and optimize our campaigns in real time through ongoing measurements	59.8	69.8
MARKETING ANALYTICS	**59.7**	**70.4**
ACCESS TO DATA		
We consistently conduct in-depth postcampaign analysis across all media channels	57.2	67.5
We connect data from all our digital activities to build a deeper understanding of what did/didn't deliver on our marketing objectives	58.2	68.8
DERIVE INSIGHT		
We have the right mix of analytical capability and marketing experience to be able to turn data into actionable insights	59.6	71.1
Key lessons from our postcampaign analysis are fed into the next campaign planning cycle	63.6	74.4
TESTING	**49.8**	**59.5**
We design tests to accurately compare the performance of different digital formats and targeting options	55.8	65.2
We design tests to accurately compare the performance of different variants of digital content/creative	55.3	64.3
We pretest offline copy in online channels (e.g., TV ads on YouTube)	33.3	41.9
We embrace lessons from failed tests and distribute them widely as learning opportunities	54.7	66.5

33–57 58–65 66–75

Source: BCG Talent Revolution Survey, 2016.

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3/17