OPTIMIZING MARKETING AUTOMATION

Survey Summary Report

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Methodology

Ascend2 benchmarks the performance of marketing strategies, tactics and the technology that drives them with a standardized online questionnaire and a proprietary 3-Minute Survey format.

This survey was fielded to a panel of marketing influencers and research subscribers during the week of May 27, 2018.

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OPTIMIZING MARKETING AUTOMATION

Marketing automation is "very important" to the overall performance of marketing, according to 94% of the best-in-class marketers participating in a recent Ascend2 survey.

But how do you optimize marketing automation to continually increase performance?

To answer this question, Ascend2 and our Research Partners fielded the Optimizing Marketing Automation Survey. We thank the marketing influencers responding to this survey for sharing their valuable insights with us, and you.

This Survey Summary Report, titled *Optimizing Marketing Automation*, represents the opinions of all the market segments responding to the survey. Specific market segments from the survey are reported on separately and exclusively by our participating Research Partners.

This research has been produced for your use. Put it to work in your own marketing strategy. Clip the charts and write about them in your blog or post them on social media. Please share this research credited as published.

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Survey Respondents
N=250

Number of Employees
More than 500   43%
50 to 500   41%
Fewer than 50   16%

Role in the Company
Owner / Partner / CXO   32%
VP / Director / Manager   51%
Non-Mgmt Professional   17%

Primary Marketing Channel
Business-to-Business   40%
Business-to-Consumer   33%
B2B and B2C Equally   27%

TOP PRIORITIES FOR MARKETING AUTOMATION

To successfully optimize marketing automation, you need a sound plan. And for nearly two-thirds of marketing influencers (64%), creating a successful strategy is a top priority for optimizing marketing automation.

What are the TOP PRIORITIES for optimizing marketing automation?

Priority	%
Creating a successful strategy	64%
Improving the user experience	50%
Delivering personalized content	38%
Integrating all marketing systems	36%
Streamlining marketing processes	36%
Enhancing measurement and reporting	33%
Achieving data unification	19%

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RATING STRATEGIC OPTIMIZATION SUCCESS

Nine-out-of-ten marketing influencers in total say a marketing automation optimization strategy is successful to some extent at achieving top priorities, with slightly more than half of those (46%) describing the success as best-in-class when compared to competitors.

How SUCCESSFUL is a marketing automation optimization strategy at achieving the top priorities?

Very successful (best-in-class)	Somewhat successful (above average)	Somewhat unsuccessful (below average)	Very unsuccessful (worst-in-class)
46%	44%	8%	2%
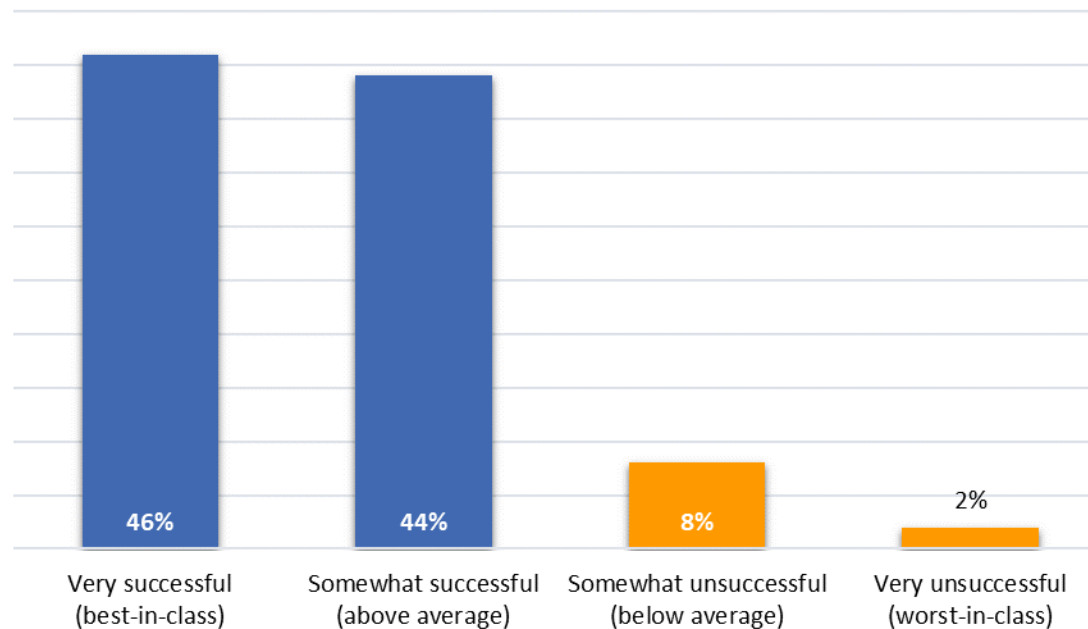
CHALLENGING BARRIERS TO SUCCESS

Delivering personalized content and integrating all marketing systems are the most challenging barriers to marketing automation success for 44% and 43% of marketing influencers respectively.

What are the most CHALLENGING BARRIERS to marketing automation success?

Barrier	Percentage
Delivering personalized content	44%
Integrating all marketing systems	43%
Creating a successful strategy	41%
Achieving data unification	38%
Improving the user experience	37%
Streamlining marketing processes	30%
Enhancing measurement and reporting	30%
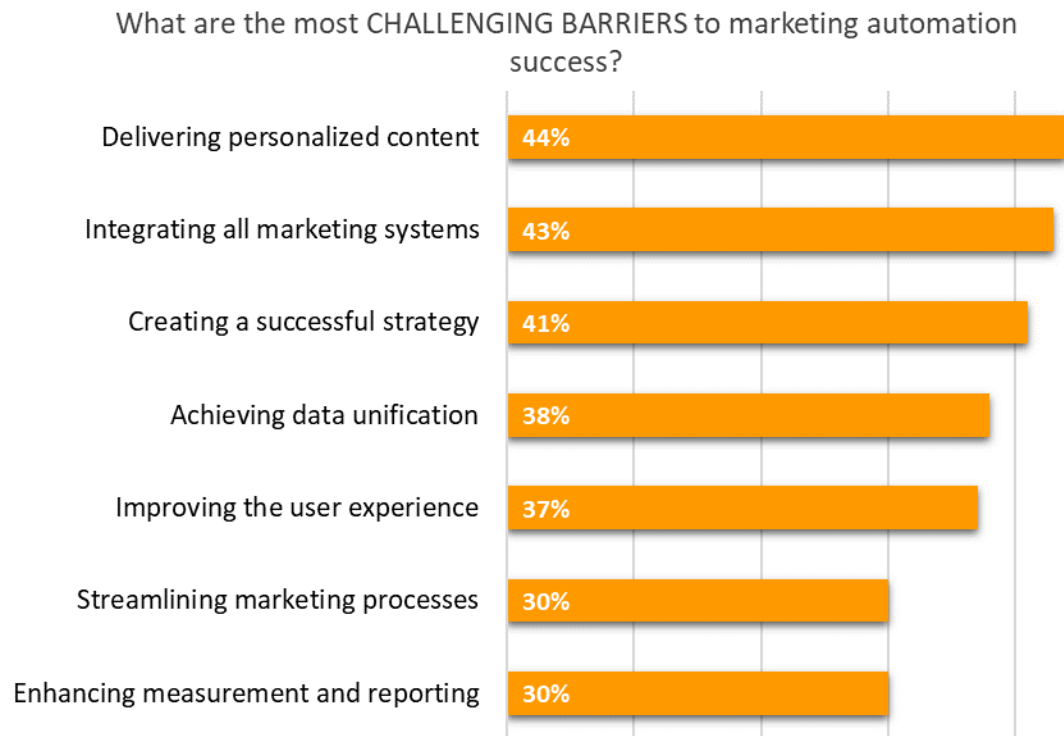
HOW CONTENT PERSONALIZATION IS CHANGING

A total of 94% of marketing influencers say content personalization driven by marketing automation is improving to some extent, with 45% describing the improvement as significant.

To what extent is CONTENT PERSONALIZATION via marketing automation changing?

Personalization is improving significantly	Personalization is improving marginally	Personalization is worsening marginally	Personalization is worsening significantly
45%	49%	4%	2%

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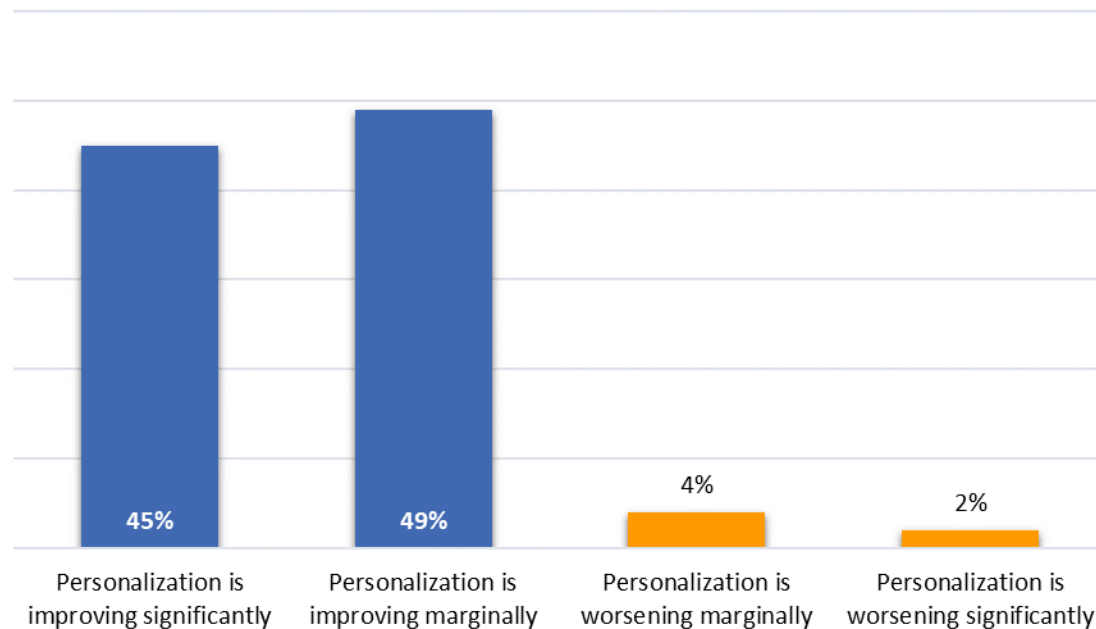
STRATEGIC PRIORITIES VERSUS BARRIERS

Analyzing the importance of top priorities in comparison to the most challenging barriers to success provides a valuable perspective for developing a balanced and successful strategy for optimizing marketing automation.

Comparing strategic priorities and success barriers

■ Top Priorities   ■ Barriers to Success

Category	Top Priorities	Barriers to Success
Creating a successful strategy	64%	41%
Improving the user experience	50%	37%
Delivering personalized content	38%	44%
Integrating all marketing systems	36%	43%
Streamlining marketing processes	36%	30%
Enhancing measurement and reporting	33%	30%
Achieving data unification	19%	38%

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EFFECTIVE TACTICS USED FOR OPTIMIZATION

Mapping the customer experience and utilizing personalized/dynamic content are considered effective tactics for optimizing marketing automation by 53% and 51% of marketing influencers respectively.

What are the most EFFECTIVE TACTICS used to optimize marketing automation?

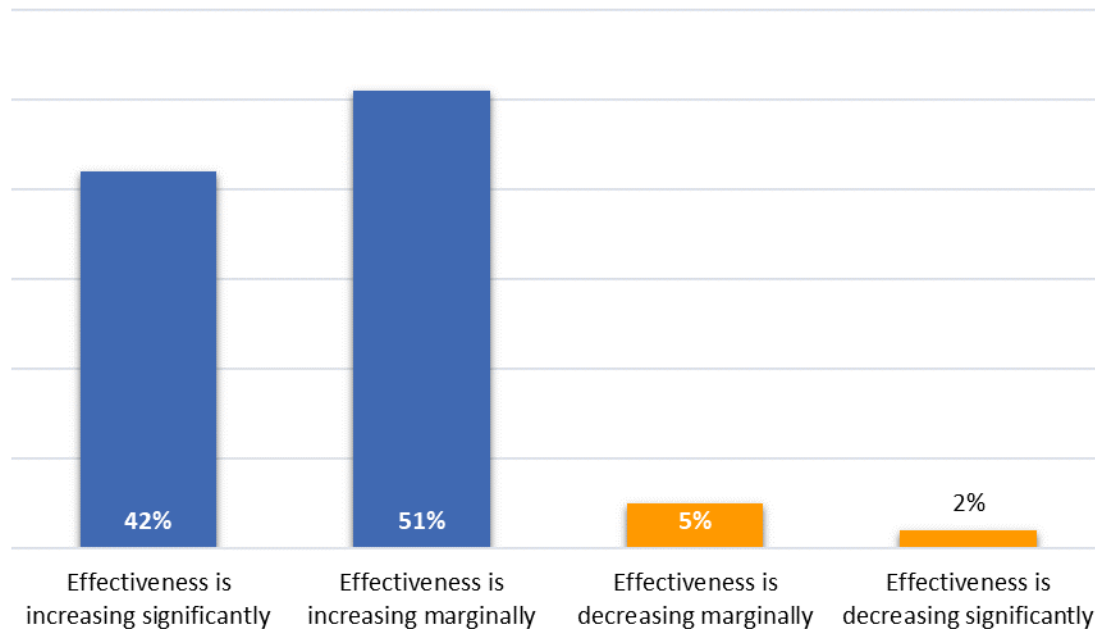| Tactic	Percentage
Customer experience mapping	53%
Personalized/dynamic content	51%
Prospect/customer re-engagement	40%
Landing page and form CTA	35%
AI and predictive modeling	34%
A/B or multivariate testing	28%
Auto-responder and drip	28%

HOW TACTICAL EFFECTIVENESS IS CHANGING

The effectiveness of tactics used to optimize marketing automation is increasing to some extent for 93% of marketing influencers, with 42% describing the increase as significant.

To what extent is EFFECTIVENESS CHANGING for the tactics used to optimize marketing automation?

42%	51%	5%	2%
Effectiveness is increasing significantly	Effectiveness is increasing marginally	Effectiveness is decreasing marginally	Effectiveness is decreasing significantly

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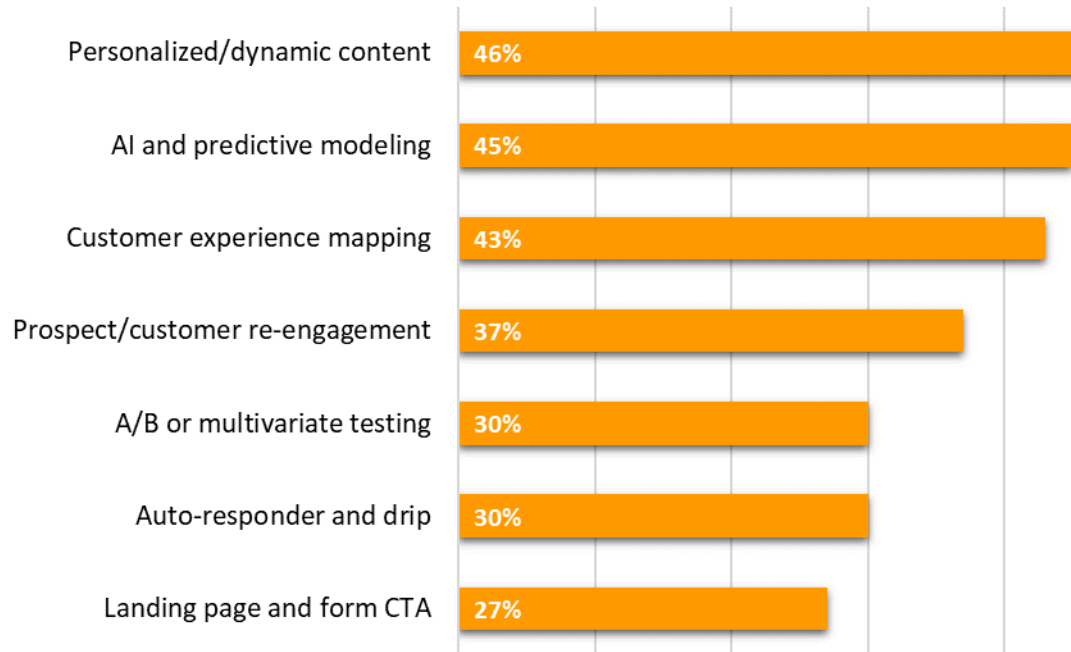
DIFFICULT TACTICS USED FOR OPTIMIZATION

Tactics for optimizing marketing automation like content personalization, artificial intelligence and predictive modeling, and customer experience mapping are especially difficult to employ for 46%, 45% and 43% of marketing influencers respectively.

What are the most DIFFICULT TACTICS used to optimize marketing automation?

Tactic	Percentage
Personalized/dynamic content	46%
AI and predictive modeling	45%
Customer experience mapping	43%
Prospect/customer re-engagement	37%
A/B or multivariate testing	30%
Auto-responder and drip	30%
Landing page and form CTA	27%

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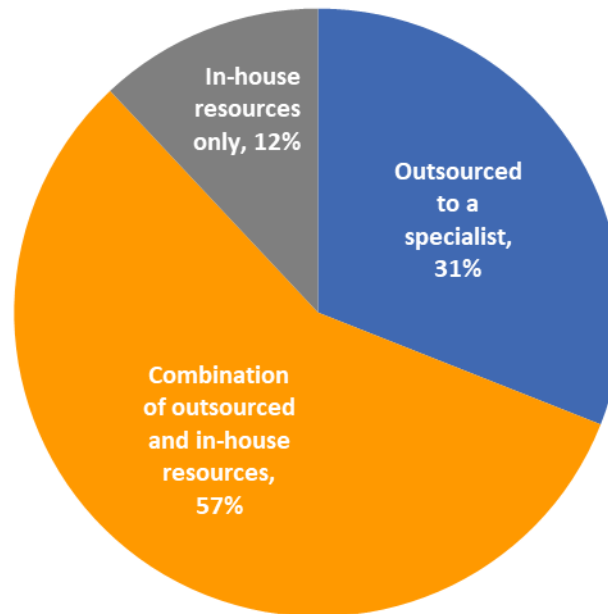by Ascend2 and our Research Partners, Published June 2018

RESOURCES USED TO IMPLEMENT TACTICS

A 57% majority of marketing influencers believe a collaboration between outsourced and in-house resources is the best way to implement tactics for optimizing marketing automation. However, 31% outsource tactics entirely to specialized resources.

Which best describes the RESOURCES USED to implement tactics for optimizing marketing automation?

In-house resources only, 12%

Outsourced to a specialist, 31%

Combination of outsourced and in-house resources, 57%

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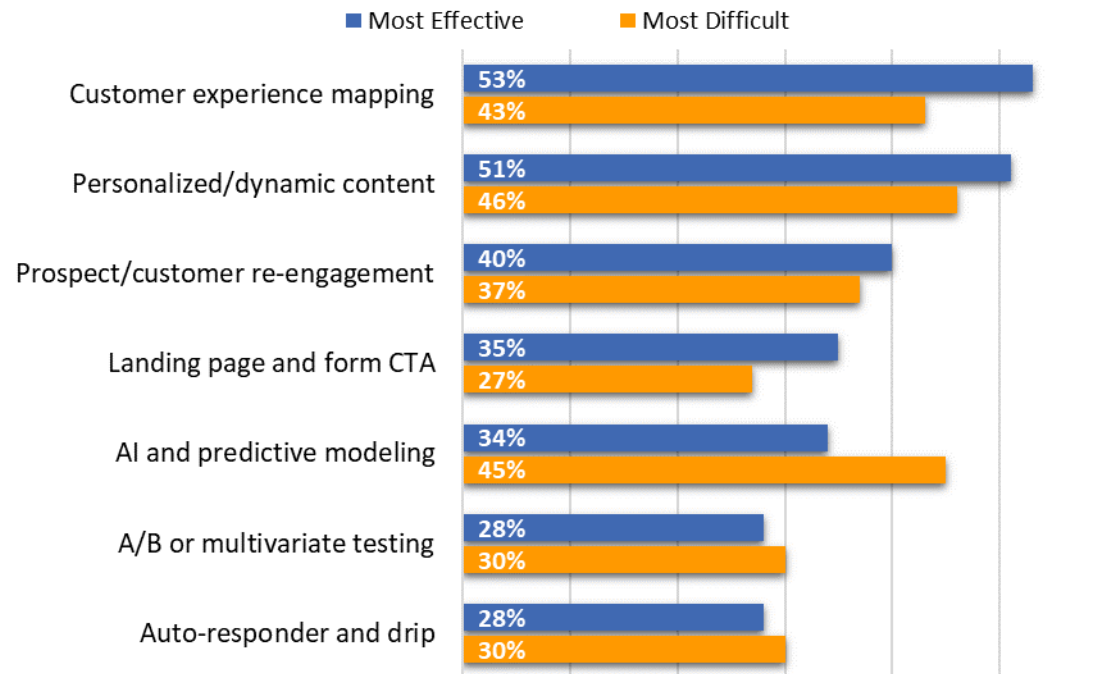by Ascend2 and our Research Partners, Published June 2018

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TACTICAL EFFECTIVENESS VERSUS DIFFICULTY

Tactics that are more effective than difficult to perform (customer experience mapping, for example) are more likely to be included in a marketing automation optimization strategy than a less effective tactic that is difficult to perform (AI and predictive modeling, for example).

Comparing tactical effectiveness and difficulty.

■ Most Effective ■ Most Difficult

Tactic	Most Effective	Most Difficult
Customer experience mapping	53%	43%
Personalized/dynamic content	51%	46%
Prospect/customer re-engagement	40%	37%
Landing page and form CTA	35%	27%
AI and predictive modeling	34%	45%
A/B or multivariate testing	28%	30%
Auto-responder and drip	28%	30%

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Marketing technology companies and digital marketing agencies partner with Ascend2 to supplement their marketing content, generate leads and engage prospects to drive demand through the middle of the funnel. Learn more about the research-based marketing innovations from Ascend2.com.

Below are just a few of the leading marketing solution providers that partner with us on research-based marketing programs.

As a marketing technology company, media or agency, your prospective customers are marketing influencers with an interest in the facts about improving marketing performance.

Research-Based Marketing is a process we developed to generate leads using factual content of interest to your target customers, and nurture those leads to the middle of the funnel in the name of your brand.

Research Partner Programs

Research Partner Programs rapidly deliver content of interest to marketers, and a guaranteed number of leads and prospects to marketing solution providers, in these two simple steps:

1. Choose marketing topics of interest to your audience.

- A new marketing topic is surveyed every month

2. Choose an exclusive survey data segment for each topic.

- Successful Strategy Benchmarks

- Leadership Benchmarks

- B2B Benchmarks

- B2C Benchmarks

- Enterprise Benchmarks

- SMB Benchmarks

- Agency Benchmarks

- And more!

Learn more about Ascend2 Research-Based Marketing by calling 800-762-1595 extension 703 or visit Ascend2.com.