THE STATE OF MARKETING AUTOMATION
A RESEARCH-BASED GUIDE FOR MARKETERS
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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 professionals and marketing research subscribers.

**Primary Marketing Channel**
- B2B: 30%
- B2C: 46%
- B2B and B2C equally: 24%

**Number of Employees**
- More than 500: 16%
- 50 to 500: 20%
- Fewer than 50: 64%

**Primary role in company**
- Owner / Partner / C-Level: 56%
- Vice President / Director / Manager: 28%
- Non-Management Professional: 16%
The capabilities that marketing automation solutions have today extend deep into every stage of the marketing funnel.

But how are marketers utilizing marketing automation today, and how do they plan to in the year ahead?

To help answer this question, Ascend2 and our Research Partners fielded The Outlook on Performance Marketing survey. We thank the 302 marketers who responded to this survey between July 13, 2021 and June 21, 2021.

This Survey Summary Report, titled *The State of 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.
It is the job of the marketer to increase revenue opportunities. To do this effectively, the marketing and sales teams must work together. Over one-third (35%) of marketers report that a top reason for implementing marketing automation is to better enable this. 34% of marketers also hope to improve customer engagement and customer experience through the use of marketing automation solutions.

**WHAT ARE THE TOP REASONS FOR IMPLEMENTING MARKETING AUTOMATION?**

- **Streamlining Marketing and Sales Efforts**: 35%
- **Improving Customer Engagement**: 34%
- **Improving Customer Experience**: 34%
- **Minimizing Manual Tasks**: 30%
- **Increasing Number of Leads Captured**: 28%
- **Optimizing Workflows**: 25%
- **Improving Lead Quality**: 24%
- **Integrating / Centralizing Data**: 21%
- **Improving Marketing Attribution**: 17%
- **Improving Multi-Channel Touch**: 10%
STRATEGIC SUCCESS

Is the use of marketing automation helping marketers achieve their strategic goals? An 84% majority of those responding to the survey describe their automation use as **successful to some extent**, but there is room for improvement. The group of marketers who reported the **most success** from the use of their marketing automation is nearly equal to the group who reported the **least amount of success**.

**Which best describes your (or your typical client’s) success at using marketing automation to achieve your top priorities?**

- **Very Successful (Best-In-Class)**: 17%
- **Successful to Some Extent**: 67%
- **Unsuccessful**: 16%
Successful marketing automation solutions are only as effective as the efforts and tactics that surround them. **Quality data** will amplify the success of a marketing automation tool according to over half (52%) of marketing professionals surveyed. Ensuring that automation is **executed strategically**, as well as proper **alignment of sales and marketing** goals also top this list for 46% and 45% of marketers, respectively.

**WHICH OF THE FOLLOWING EFFORTS OR TACTICS MOST AMPLIFIES THE SUCCESS OF YOUR MARKETING AUTOMATION TOOL?**

- **Quality data**: 52%
- **Strategic execution**: 46%
- **Alignment of sales and marketing**: 45%
- **Customer journey mapping**: 26%
- **Adequate staff training**: 22%
- **Lead scoring**: 18%
- **Defining personas**: 13%
CURRENT USE OF AUTOMATION

With the ever-increasing number of technology and solutions available today, marketing automation can be applied throughout the entire marketing funnel as well as to many facets of a marketing strategy. According to this research, two-thirds (65%) of marketers are using marketing automation as a part of their email marketing efforts. Nearly half (47%) of marketing professionals surveyed are using marketing automation to manage their social media. Landing pages and paid advertising are also among the most common areas where marketers are using automation.

IN WHICH OF THE FOLLOWING AREAS DO YOU CURRENTLY UTILIZE MARKETING AUTOMATION?

- Email Marketing: 65%
- Social Media Management: 47%
- Landing Pages: 30%
- Paid Ads: 28%
- Campaign Tracking: 25%
- Content Management: 23%
- SEO Efforts: 18%
- Account-Based Marketing: 18%
- SMS Marketing: 17%
- Lead Scoring: 17%
- Workflows / Automation Visualization: 16%
- Sales Funnel Communications: 14%
- Push Notifications: 13%
- Live Chat: 13%
- Dynamic Web Forms: 12%
In which areas do marketers plan to utilize automation in the year ahead? In the coming months, 40% of marketers are planning to add automation to their email marketing efforts in the year ahead. Marketers also report that social media will soon be managed through automation tools. Live chat (21%), Account-Based Marketing (ABM) (21%), and paid advertising (32%) are also notable areas where the percentage of marketers who plan to use automation is greater than the percentage of marketers who are already using automation.

<table>
<thead>
<tr>
<th>Area</th>
<th>Planned Percentage</th>
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<tbody>
<tr>
<td>Email Marketing</td>
<td>40%</td>
</tr>
<tr>
<td>Social Media Management</td>
<td>39%</td>
</tr>
<tr>
<td>Paid Ads</td>
<td>32%</td>
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<tr>
<td>Landing Pages</td>
<td>26%</td>
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<tr>
<td>Campaign Tracking</td>
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<td>Content Management</td>
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<td>Account-Based Marketing</td>
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<td>Live Chat</td>
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<td>Workflows / Automation Visualization</td>
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PROPER UTILIZATION OF TOOLS

Marketing automation tools can consist of many different features to help marketers integrate data into a central location, make marketing processes more efficient, and provide a more personalized customer experience. However, over half (54%) of marketing professionals feel that they are not using their marketing automation tools to their fullest potential.

DO YOU FEEL THAT YOU ARE UTILIZING YOUR MARKETING AUTOMATION TOOLS TO THEIR FULLEST POTENTIAL?

- Yes: 20%
- No: 54%
- Not Sure: 26%
### BARRIERS TO PROPER UTILIZATION OF TOOLS

What is preventing marketers from using their automation tools to their fullest potential? According to 39% of those surveyed, there is an insufficient amount of training and resources available to ensure proper use. Other significant barriers include lack of resources to manage the tools for 32% of marketers and a lack of budget to maintain them for 31% of marketers.

<table>
<thead>
<tr>
<th>What Are the Most Significant Barriers to Utilizing Your Marketing Automation Tool(s) to the Fullest Potential?</th>
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</thead>
<tbody>
<tr>
<td>Lack of training / resources / knowledgebase</td>
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<tr>
<td>Lack of resources to manage</td>
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<tr>
<td>Lack of budget to maintain</td>
</tr>
<tr>
<td>Complicated setup</td>
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<tr>
<td>Slow onboarding process</td>
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<tr>
<td>Inability to integrate with other tools</td>
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<tr>
<td>Missing or inadequate features</td>
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<tr>
<td>Decentralized data</td>
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<tr>
<td>Lack of internal adoption or buy-in</td>
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<tr>
<td>Lack of customization options</td>
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</tbody>
</table>
EXTENT OF AUTOMATION INTEGRATION

It is critical for marketers to be able to integrate a marketing automation tool into solutions that already exist in their technology stack. Nearly two-thirds (64%) of marketers report that their automation solutions are only somewhat integrated or not at all integrated. A mere 7% of marketers report that their marketing automation solution is entirely integrated with the rest of their technology stack.

WHICH BEST DESCRIBES THE INTEGRATION OF YOUR MARKETING AUTOMATION SOLUTION(S) WITH THE REST OF YOUR TECHNOLOGY STACK?
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