THE STATE OF MARKETING AUTOMATION

A RESEARCH-BASED GUIDE FOR MARKETERS

Research Series Conducted in Partnership with Leading Providers
of Marketing Technology and Digital Marketing Agency Services.

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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 professionals and marketing research subscribers.

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SURVEY RESPONDENTS

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 STATE OF
MARKETING AUTOMATION

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.

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REASONS FOR IMPLEMENTATION

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?

Reason	Percentage
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%

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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**.

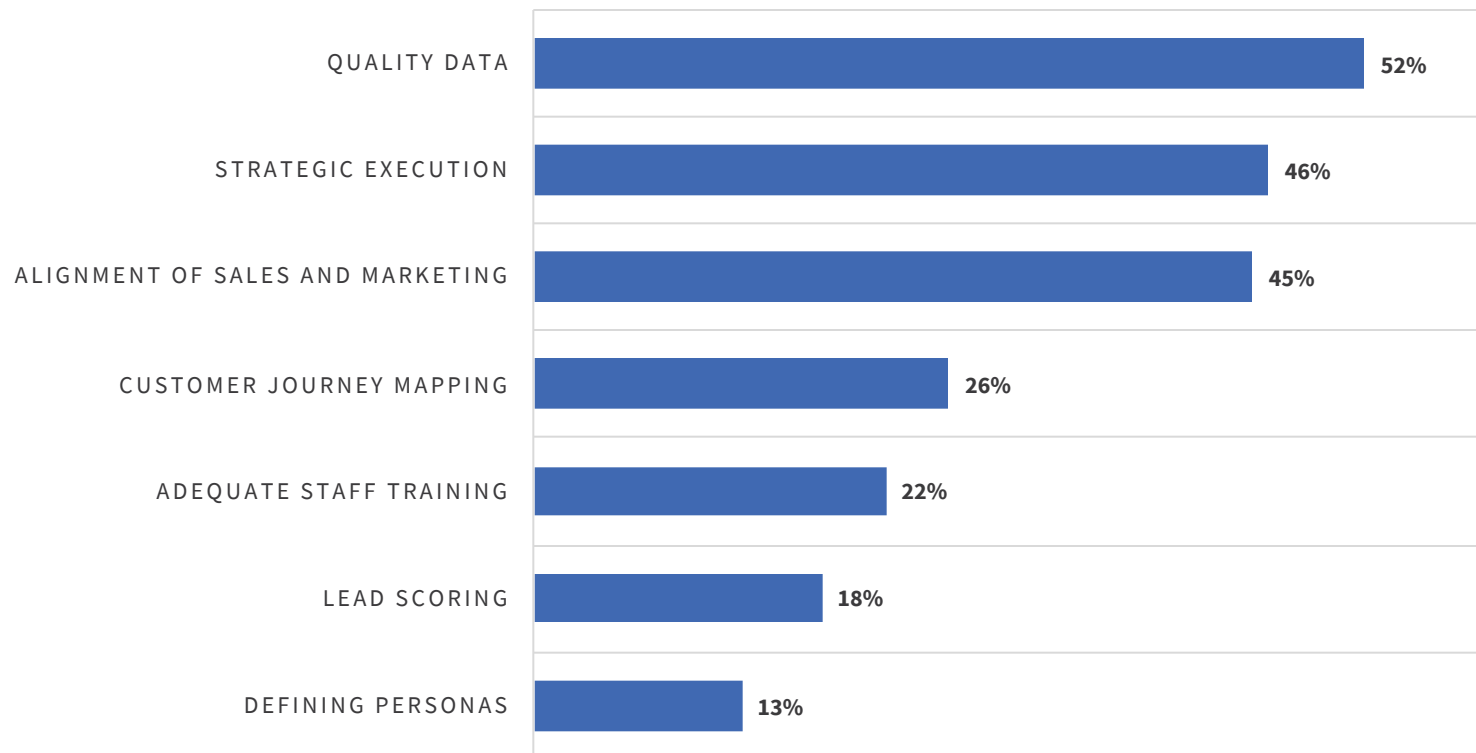**WHICH BEST DESCRIBES YOUR (OR YOUR TYPICAL CLIENT'S) SUCCESS AT USING MARKETING AUTOMATION TO ACHIEVE YOUR TOP PRIORITIES?**

UNSUCCESSFUL
16%

VERY SUCCESSFUL
(BEST-IN-CLASS)
17%

SOMEWHAT
SUCCESSFUL
67%

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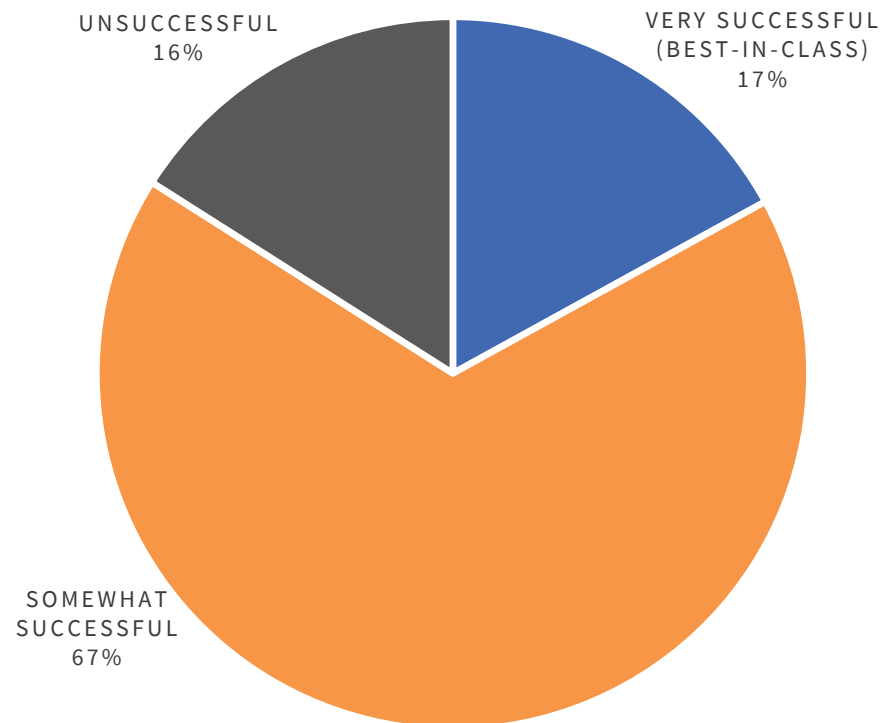
AMPLIFYING AUTOMATION SUCCESS

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?

Tactic	Percentage
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%

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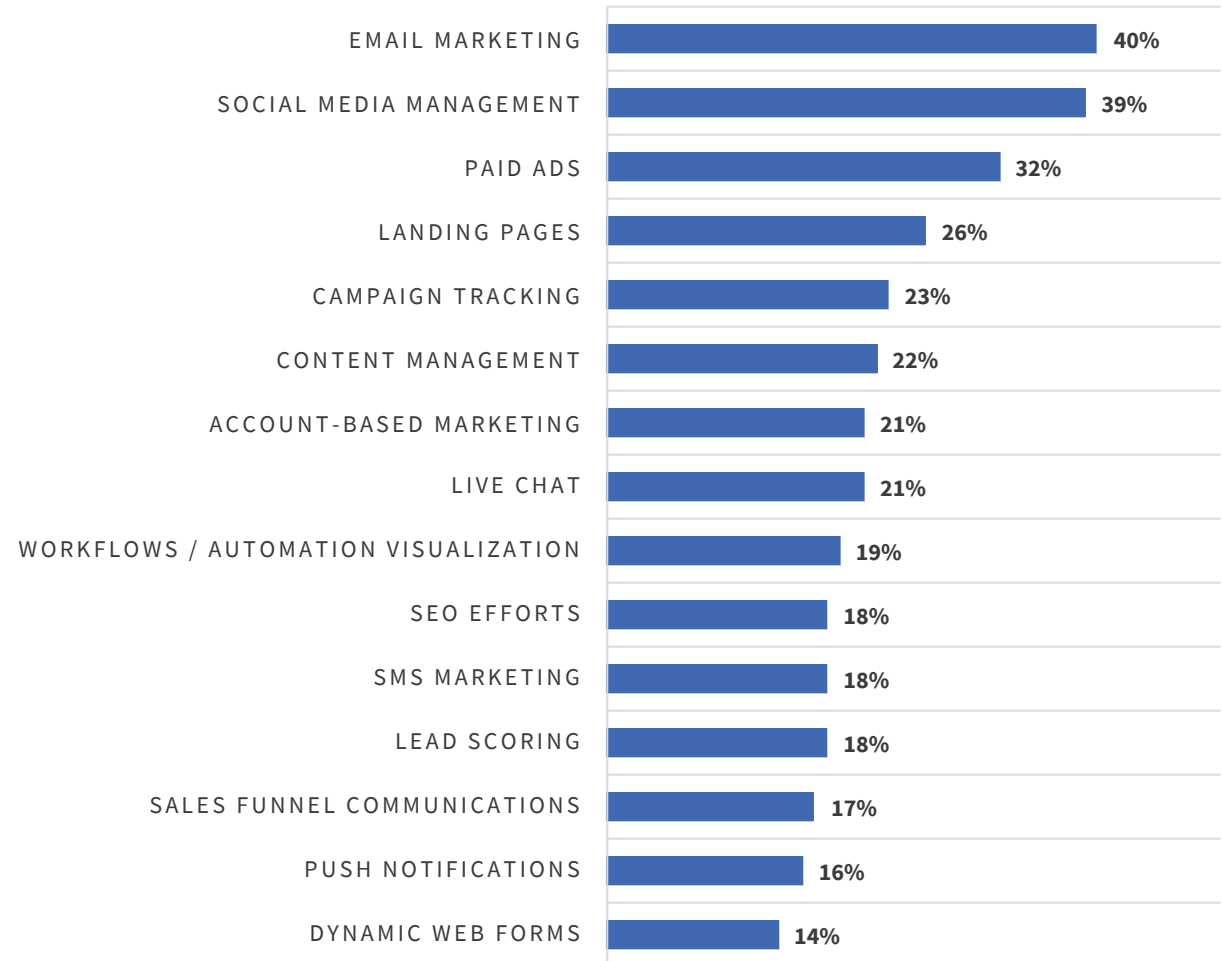
IN WHICH OF THE FOLLOWING AREAS DO YOU CURRENTLY UTILIZE MARKETING AUTOMATION?

Area	Percentage
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%
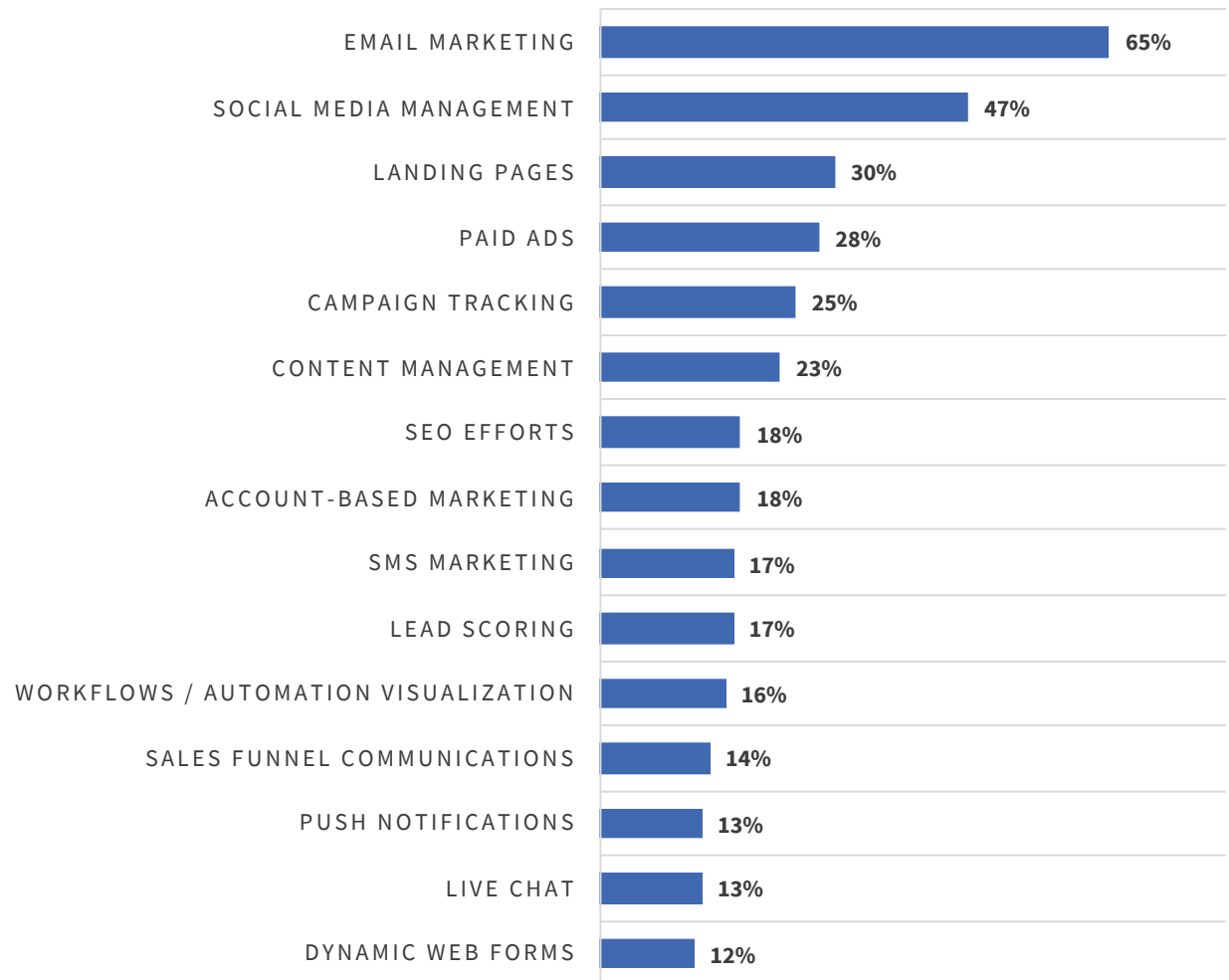
PLANNED USE OF AUTOMATION

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.
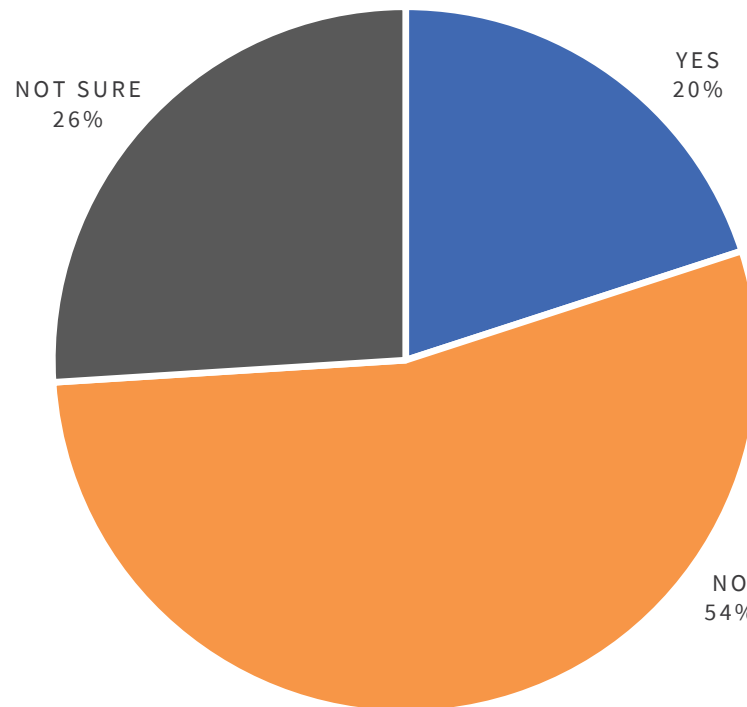
IN WHICH OF THE FOLLOWING AREAS DO YOU PLAN TO IMPLEMENT MARKETING AUTOMATION IN THE YEAR AHEAD?

Area	Percentage
EMAIL MARKETING	40%
SOCIAL MEDIA MANAGEMENT	39%
PAID ADS	32%
LANDING PAGES	26%
CAMPAIGN TRACKING	23%
CONTENT MANAGEMENT	22%
ACCOUNT-BASED MARKETING	21%
LIVE CHAT	21%
WORKFLOWS / AUTOMATION VISUALIZATION	19%
SEO EFFORTS	18%
SMS MARKETING	18%
LEAD SCORING	18%
SALES FUNNEL COMMUNICATIONS	17%
PUSH NOTIFICATIONS	16%
DYNAMIC WEB FORMS	14%

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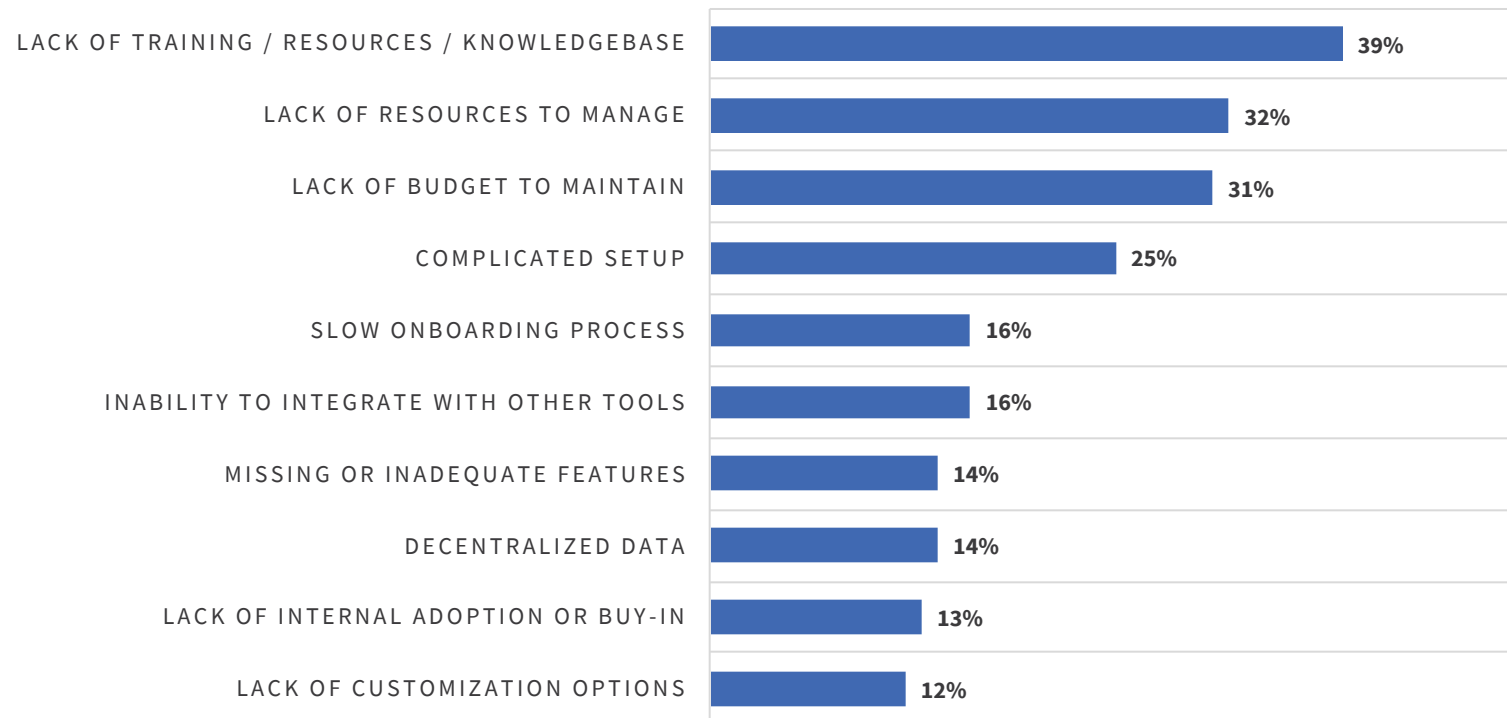
DO YOU FEEL THAT YOU ARE UTILIZING YOUR MARKETING AUTOMATION TOOLS TO THEIR FULLEST POTENTIAL?

NOT SURE
26%

YES
20%

NO
54%

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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 a **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.
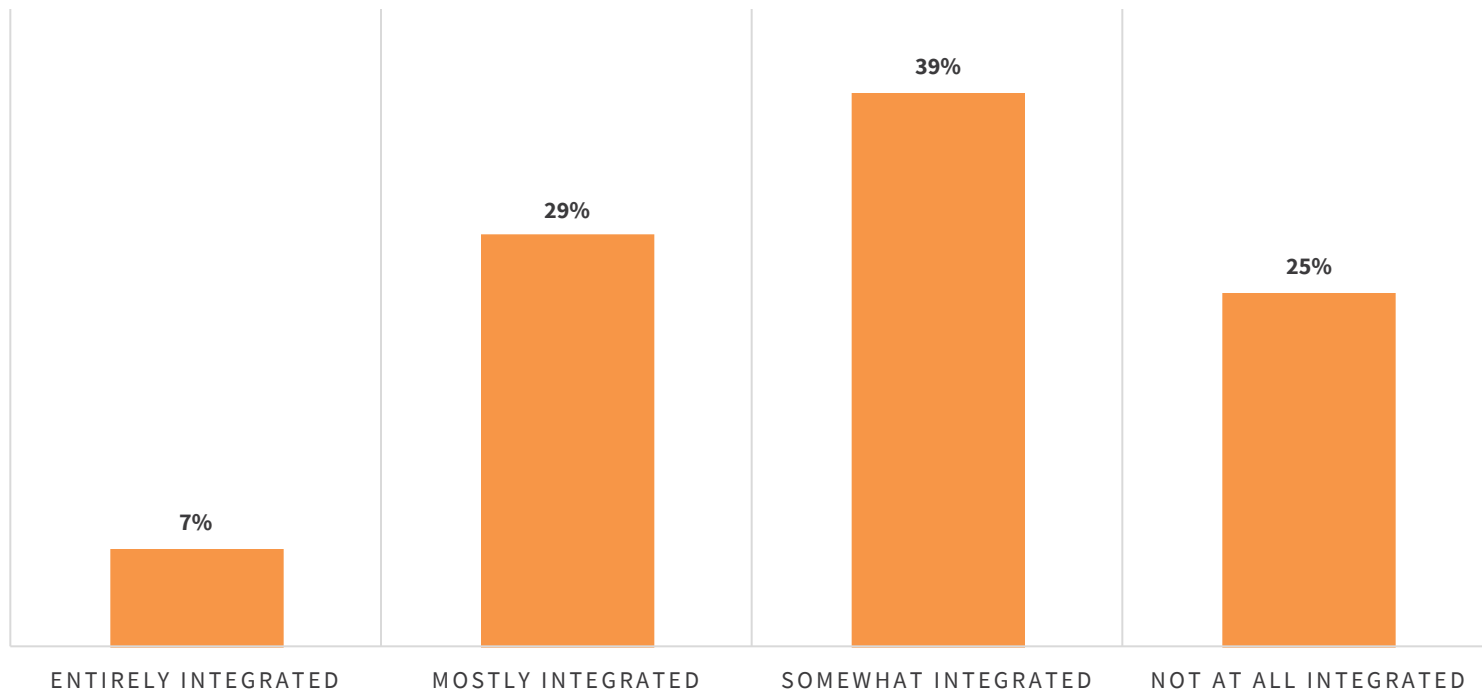
WHAT ARE THE MOST SIGNIFICANT BARRIERS TO UTILIZING YOUR MARKETING AUTOMATION TOOL(S) TO THE FULLEST POTENTIAL?

Barrier	Percentage
LACK OF TRAINING / RESOURCES / KNOWLEDGEBASE	39%
LACK OF RESOURCES TO MANAGE	32%
LACK OF BUDGET TO MAINTAIN	31%
COMPLICATED SETUP	25%
SLOW ONBOARDING PROCESS	16%
INABILITY TO INTEGRATE WITH OTHER TOOLS	16%
MISSING OR INADEQUATE FEATURES	14%
DECENTRALIZED DATA	14%
LACK OF INTERNAL ADOPTION OR BUY-IN	13%
LACK OF CUSTOMIZATION OPTIONS	12%

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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?

ENTIRELY INTEGRATED	MOSTLY INTEGRATED	SOMEWHAT INTEGRATED	NOT AT ALL INTEGRATED
7%	29%	39%	25%

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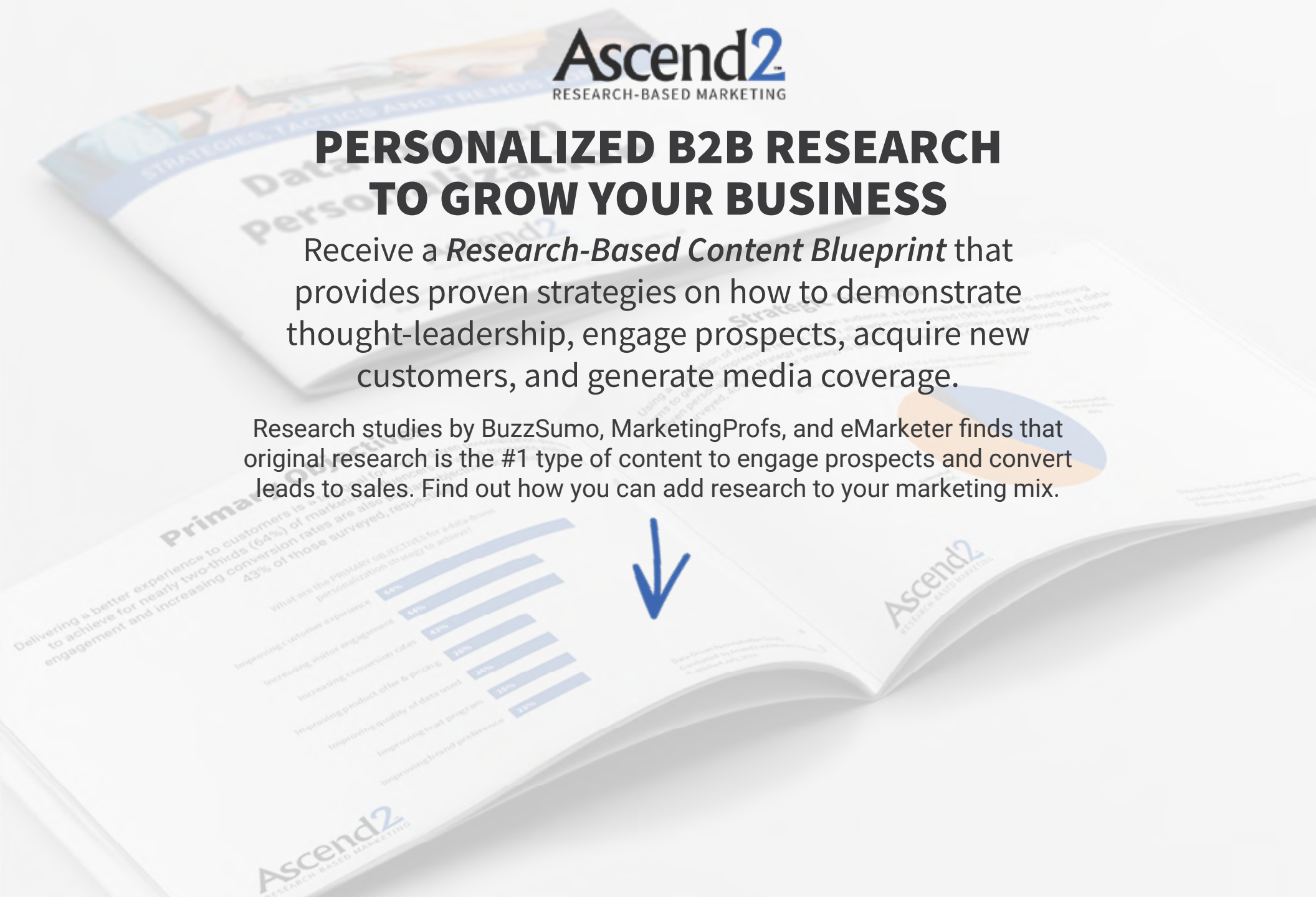Conducted by Ascend2 and Research Partners
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