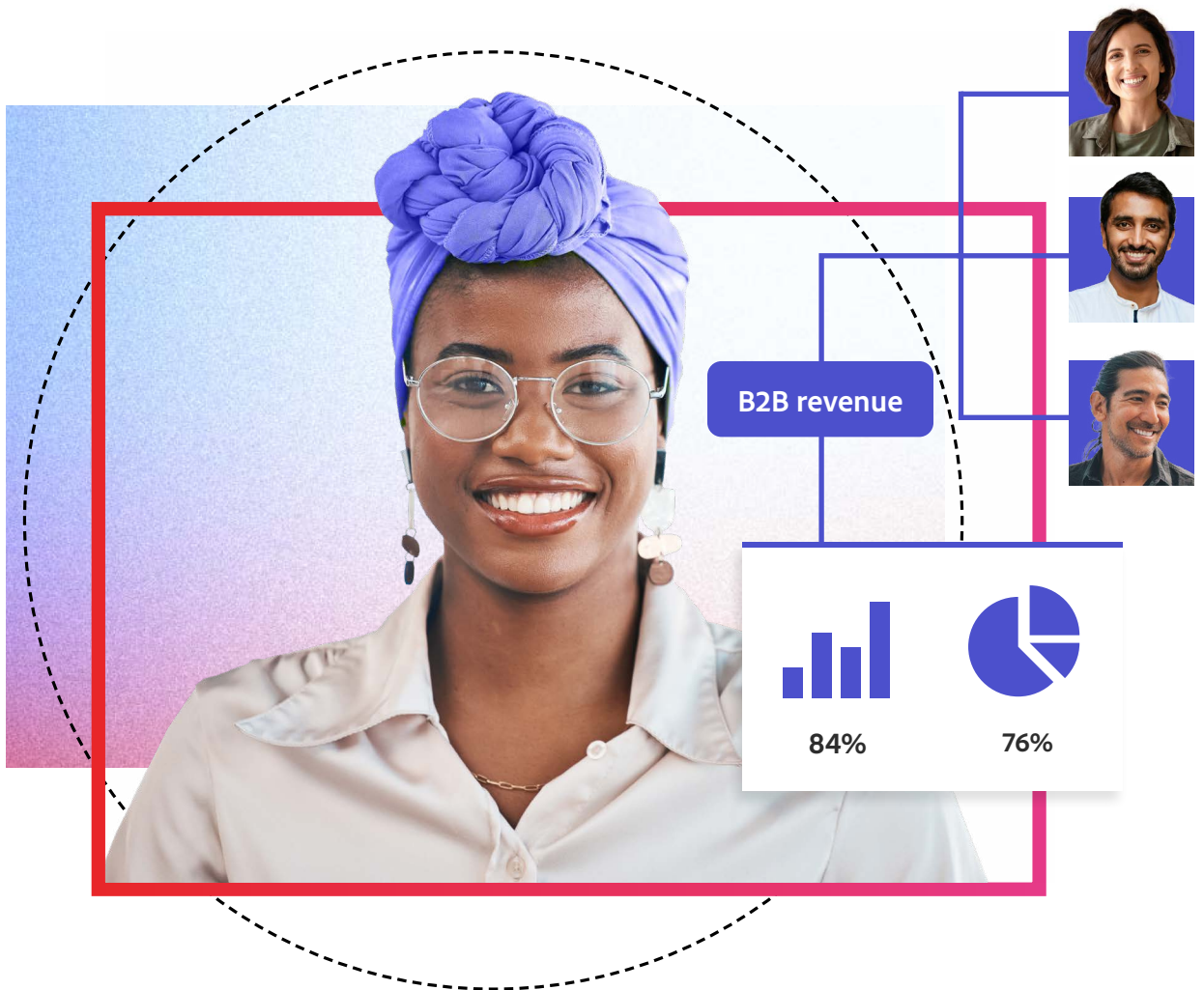




RESEARCH REPORT

The state of marketing automation in the age of AI

Secrets to marketing success and B2B growth in 2024 and beyond.



Welcome to the second edition of *The State of Marketing Automation*.

This report offers real-world insights into how marketing leaders use automation today—and what they're planning for tomorrow. It's a great resource for:



B2B marketers from CMOs through directors, managers, and practitioners



B2B marketing operations leaders and practitioners



B2C marketers with a long demand funnel that requires B2B tools



Business growth



Personalized experiences



→ What's inside

This year's report addresses key trends including:

- Generative artificial intelligence
- Conversational marketing
- Buying group engagement
- AI-driven marketing measurement
- Content supply chain

We learned a lot and we hope you will, too. Enjoy!

About our research

We asked marketing leaders at over 600 organizations to tell us how they use marketing automation. Our mission was to uncover pressing concerns, pinpoint best practices that separate leading marketing teams from everyone else, and capture leaders' thoughts on forward-looking trends and strategies.

First impressions

This year, we found marketers focused on the future and thinking seriously about new enabling technologies, especially artificial intelligence (AI). Many believe that B2B marketing and operations is ripe for reinvention and see an opportunity to gain competitive advantage through marketing modernization and transformation.

100% of marketers who participated in this research use a marketing automation technology or lead a team that uses one.



Contents

- 5 **Before we dive in.**
- 6 **Research methods and demographics.**
- 7 **Marketing objectives and budget.**
- 8 **Marketing performance segments.**
- 9 **Secrets to success.**
 - 10 Data foundation and artificial intelligence.
 - 12 Next-generation B2B go-to-market orchestration.
 - 14 Personalized content at scale.
 - 16 Intelligent, interactive engagement.
 - 18 Modern marketing measurement.
- 20 **In closing.**

Marketing leaders at **over 600 organizations** told us how they use marketing automation.

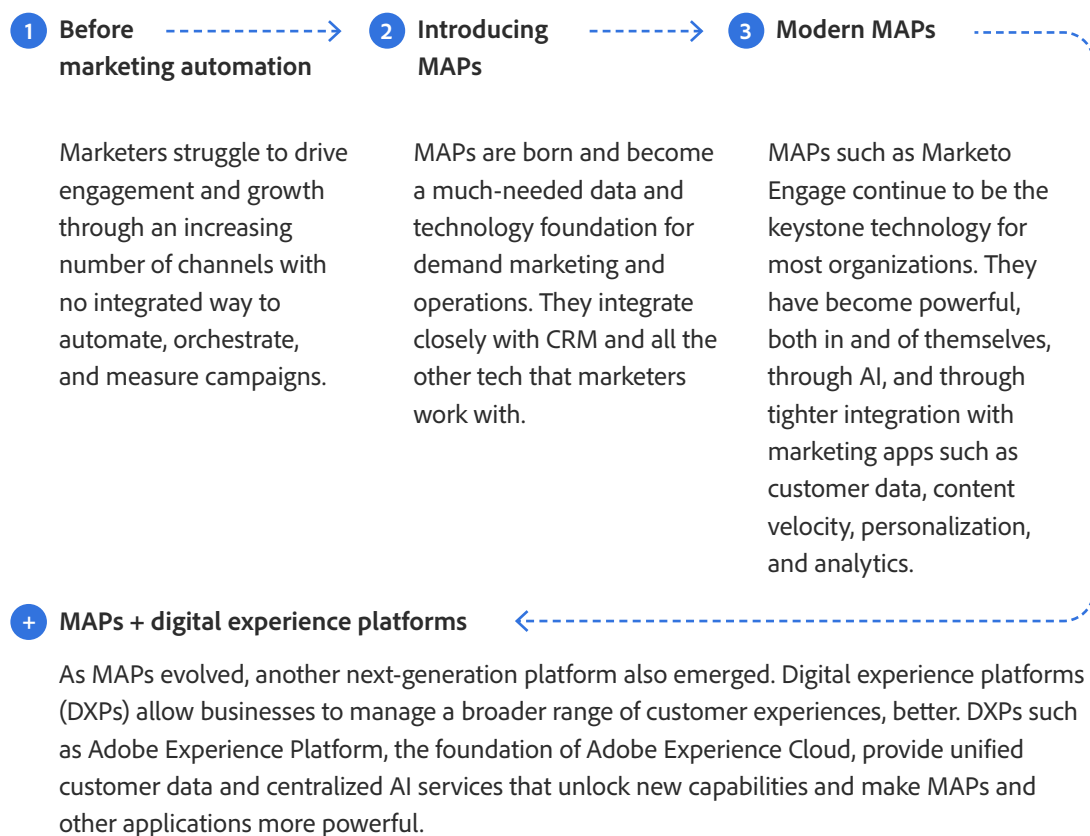
Read on to hear what they said →

Before we dive in.

What is marketing automation?

Marketing automation can be defined in a few different ways. At its highest level, it represents any use of technology to automate, optimize, and scale-up marketing efforts. Marketing Automation Platforms (MAPs), on the other hand, represent a specific category of software-as-a-service (SaaS) applications. These applications continue to be known as “the heart of the B2B MarTech stack,” even as new technologies emerge to strengthen marketing overall. Adobe Marketo Engage has been a leader in this space for years. This research is inclusive of all B2B marketing automation providers.

How marketing automation has evolved over the years



“Marketing automation is what runs the end-to-end programming of marketing.

Vladlena Mitskaniouk

Head of Demand Generation, Solo.io

Research methods and demographics.

Our goal was to learn from enterprise B2B marketing leaders, demand generation teams, growth teams, and marketing/revenue operations teams about their experiences and perspectives with marketing automation. We conducted interviews and a double-blind survey of 600 organizations in collaboration with an independent research partner.



Job level

- 31% CMO or VP
- 32% Director
- 36% Manager
- 1% Individual contributor

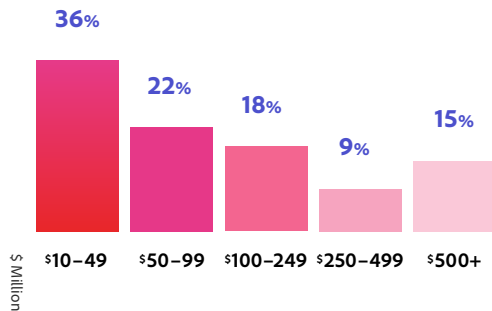


Top 5 B2B marketing automation providers

- 36% Adobe
- 24% Microsoft
- 17% Salesforce
- 15% Hubspot
- 8% Oracle



Company size by annual revenue (USD MM)

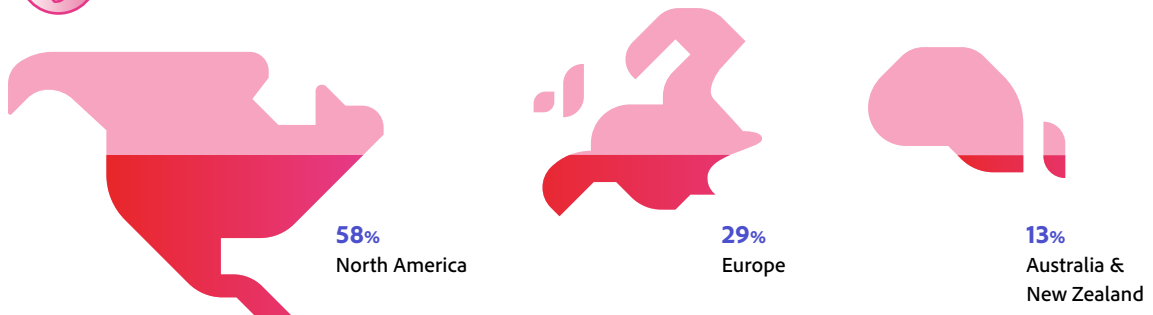


Industry

- 39% Technology
- 29% Business services
- 12% Manufacturing
- 11% Financial services
- 5% Healthcare
- 4% Other



Region



Marketing objectives and budget.

Our research suggests that marketing teams are working towards multiple high-priority goals. When asked about objectives this year, we saw nearly a three-way tie between:

1. Improving buying and customer experience (CX)
2. Improving marketing return on investment (ROI)
3. Growing pipeline and revenue

Last year, ROI took the top position. One CMO interviewed aptly stated, “Revenue is great, but not at any cost.”

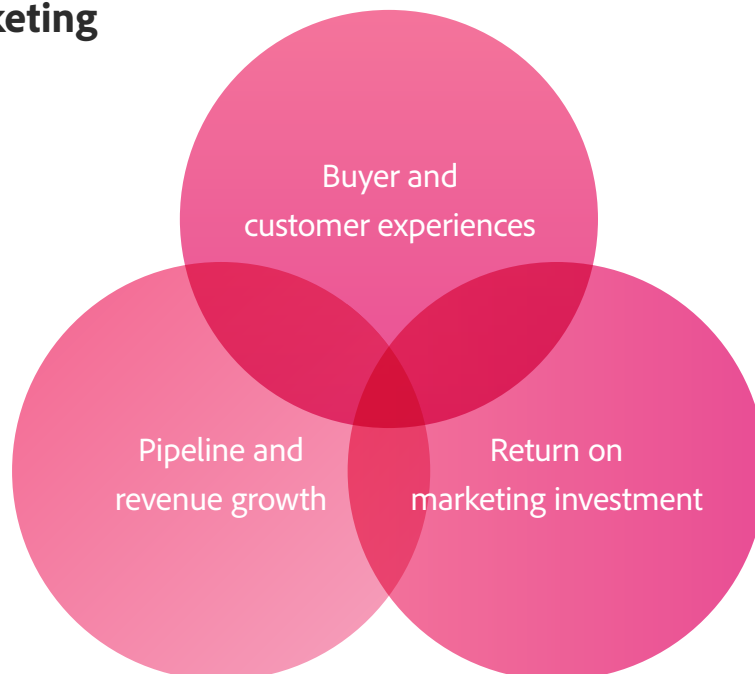
This year, CX edges out the others, sending a message that B2B marketing is becoming as focused on experiences as B2C teams. We believe this makes sense—in B2B, strong customer relationships are key to business growth. Ultimately, the three objectives are linked. ROI enables the efficient and cost-effective delivery of experiences that, in turn, fuel pipeline and revenue growth.

Finally, the presence of pipeline and revenue growth in marketers' top three goals indicated that demand and deal velocity were top of mind this year—and that marketers are hoping to harness CX and greater efficiency to accelerate funnel progression across all stages.

“ Our success hinges on two key factors: growth and the speed at which we can achieve it.

Justin Brady
Head of Marketing
OnDeck

Primary marketing objectives.



Planned marketing investment.

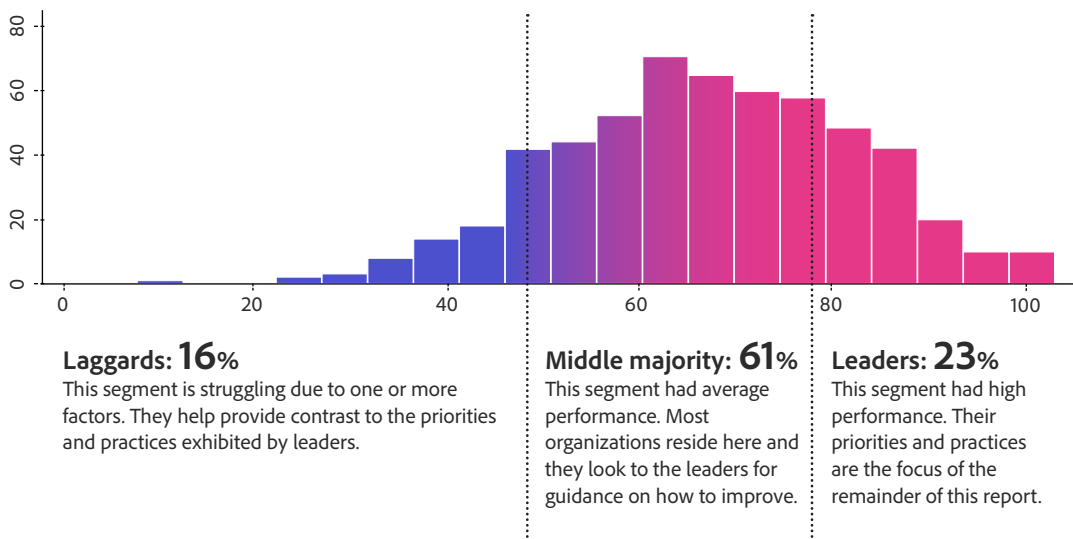
What budget changes are you planning over the next 12 months?

Marketing investment	Increase	Same or Decrease
Marketing technology	75%	25%
Marketing programs	69%	31%
Marketing agencies/consultants	58%	42%
Marketing staff	55%	45%

Marketing performance segments.

While marketers' goals tell us a lot about their intent, they don't tell us much about their performance. To separate leaders from laggards, we considered self-reported performance and exhibited marketing maturity across a set of high-level best practice areas identified by Adobe in prior research. These include data-driven planning, sales and marketing alignment, channel orchestration, and technology adoption.

Maturity index



A leader's advantage is significant.

Improving buyer and customer experience:

Leaders are 10x more likely than laggards to be outperforming.

Growing pipeline and revenue:

Leaders are 10x more likely than laggards to be outperforming.

Improving marketing ROI:

Leaders are 27x more likely than laggards to be outperforming.

Secrets to success.

What leaders are doing and where they're investing.

Through our interviews and survey, we found that leaders are focused on the following 5 areas:



1. **Data foundation and artificial intelligence:** Leaders agree that AI is the next big thing in marketing. It can identify patterns and generate content in ways that are exceptionally valuable to marketers. Good AI, like everything else in marketing today, is dependent on a solid data foundation.



2. **Next-generation B2B go-to-market (GTM) orchestration:** B2B typically requires engaging with and nurturing buying groups within accounts. However, most organizations today lack the processes and tools they need to do this well. Leaders are exploring new GTM orchestration methods and AI which build upon and join together today's lead-based and account-based approaches.



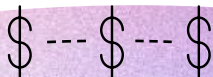
3. **Personalized content at scale:** Content is the fuel of marketing. However, scaling the creation of personalized content to support better and more sophisticated segmentation is difficult. Leaders are honing their content supply chains and incorporating AI to tackle this challenge and unlock precision targeting and engagement.



4. **Intelligent, interactive engagement:** As buyer attention spans and patience decline, the desire for real-time conversations on digital channels is greater than ever. Leaders are adopting integrated solutions to gain agility and are leveraging AI in real-time customer conversations with chatbots and business development reps.

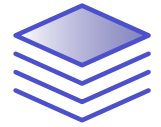


5. **Modern marketing measurement:** The complexities of B2B make marketing attribution and customer journey analytics particularly challenging. Leaders, though, are implementing AI-based processes to finally get attribution right and are using a new category of specialized journey analytics applications. These new tools are giving them the insights they need to optimize tactics, investments, and the customer experience.



1

Data foundation and artificial intelligence.



Without a solid data foundation, AI-based services don't get what they need to perform at their best. Meanwhile, without AI, you might have a lot of data—but you won't extract maximum value from it.

Applications such as MAPs and now customer data platforms (CDPs) are helping B2B marketing leaders expand beyond the confines of customer relationship management (CRM)-based operations to unlock the value of data and AI. Leaders are different—they are investing the time to centralize data and test new AI capabilities.

CDPs underlie modern marketing architecture.

Both CRM and CDP integrations are critical in B2B, but leaders now rate integration between marketing automation and a B2B-capable CDP as even more important than CRM integration. According to our respondents:

Marketing automation integration with CDP is "very important"	98%
Marketing automation integration with CRM is "very important"	94%

How B2B marketing organizations view generative AI.

"We trust AI to optimize our marketing activities without any need for human oversight"	24%
"We trust AI to optimize our marketing activities with some human oversight"	48%
"We are cautious about the use of AI in marketing. We only use it for very tightly defined use cases and/or mandatory human review and approval"	28%

“ Our tech stack is aligned to our business plan and we've done well to earn our seat at the revenue table, but B2B overall is still too overly dependent on manually entered CRM data.

John Steger
CMO, Baker Tilly

“ I think AI will be a game changer in marketing. Start small, test, learn, and only then scale your AI initiatives. It’s not too late to level up and get in the game.

Robert Gillespie

VP of Marketing, JP Morgan Chase

Generative AI use cases and adoption grow.

Marketing investment	Leaders	Laggards
Generating text for content/communications	67%	41%
Generating content/conversation summaries	66%	28%
Generating imagery and design for content/communications	62%	33%
Generating digital conversational experiences	58%	27%
Generating content and guidance to aid human conversations such as those in sales and business development	56%	22%



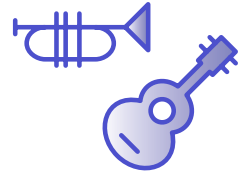
Adobe Spotlight: [Adobe Real-Time CDP](#) and [Adobe Sensei GenAI](#)

72% of marketing leaders trust AI to optimize their marketing activities with some human oversight.



2

Next-generation B2B go-to-market orchestration.



Marketing leaders are keen to be early adopters of new B2B GTM orchestration practices and tools in addition to AI.

Most B2B purchase decisions are made by a group of individuals (a buying group). Yet, in most organizations, marketing and sales don't have a great process for working together to understand and nurture buying groups through all stages.

In B2B, leads (individual people including initial purchase champions) are critical. So are accounts and the ability to prioritize account targets. Ultimately, though, it's always been about buying groups, and leaders are exploring new processes and technologies with Adobe and others to enable this new generation of B2B GTM orchestration.

“ Buying groups are 100% where we are now. You're not selling to an individual, you're selling to a whole team of people.

Esme Cottle

Director of Demand Generation
Thomas International

Leaders' point of view on buying groups.

Leads are important. Accounts are important. According to marketing leaders, however, connecting with buying groups is where B2B GTM efforts can most effectively create, progress, and win deals—whether through new business or sales to existing customers.

96% of leaders agree or strongly agree that an ability to systematically identify and engage with B2B buying groups is important.

88% of leaders agree or strongly agree that marketing to one person is ultimately too narrow and marketing to every person in an account is too broad.

Aligning marketing and sales.

In our study, 93% of leaders agreed marketing had enough influence in setting fiscal year market and account priorities. However, 87% told us it's easy to lose alignment with sales over time. This is, in part, due to today's multiple disconnected GTM processes within and across marketing and sales.

Top 3 most-recognized potential benefits of buying-group-centered GTM.

- 1 Long-sought marketing and sales alignment:** Marketing is able to manage demand and assist with progression in a way that matches how sales would like to receive it—with an account, opportunity, and buying group lens instead of just a single person.
- 2 More effective GTM orchestration:** Buying groups create a basis of alignment which can unlock seamless workflows for planning, multiple GTM motions and plays, orchestrated engagement, and shared measurement.
- 3 Deal velocity and better CX:** When B2B organizations can organize engagement around buying groups, it can help those groups move more quickly through their decision process and reach consensus. As it turns out, that's a win-win. The vendor gains deal velocity. The customer gets the kind of buying experience they want—an efficient one.



Adobe Spotlight: [Adobe Journey Optimizer, B2B Edition](#) and [Adobe Marketo Engage](#)

“When you start to infer insights based on interactions of the buying group, that could be really powerful. Also, having that as a signal that you can provide to sales is important as well.

Steve Armenti

Group Manager, Global Demand Generation
Google

3

Personalized content at scale.



The more targeted the marketing, the better, but content is often the limiting factor in how deeply marketing can effectively segment and engage with different audiences. Is it valuable to personalize by industry, account profile, buying center, or account history? Yes. Is it valuable to personalize by person profile, persona, buying group role, product consideration, or funnel stage? Yes. Does this get complicated fast? It sure does.

All in all, leaders felt that their systems of segmentation and marketing automation were capable of delivering highly personalized marketing, but an inability to create personalized content at scale was holding them back. Being leaders, they are already working on a solution to transform their content supply chain with AI and better-integrated workflows for planning, creation, delivery, and measurement.

Leaders differentiate with personalized content.

	Leaders	Laggards
Percent performing high-level personalization*	64%	7%

* This data point is from last year's research, but bears repeating.

Content-related processes rate among “most important” and “most needing work” in marketing.

Dynamic personalized content	6th among 22 aspects of marketing automation
Integration with content supply chain	7th among 22 aspects of marketing automation

“ AI can have a big impact. Not replacing what humans do, but at least prompting them.

Mike Goodbourn

Marketing Automation Manager, Victoria University of Wellington

“ From a copywriting perspective today, we use generative AI mostly for ideation. Today, we still need the combination of technology, automation, AI, and the human review layer.

Kerry Curran

Chief Growth Officer, Gen3 Marketing

AI is working its way into content lifecycle processes.

Marketing investment	Leaders	Laggards
“AI is very much business as usual in the context of our marketing activities”	21%	3%
“AI has been operationalized into our day-to-day marketing activities”	26%	13%
“We are experimenting but haven’t developed many proofs of concept”	26%	61%
“We are aware of the potential but have not used AI capabilities”	27%	23%

Generative AI



Adobe Spotlight:
[Adobe Marketo Engage](#)
and [Adobe GenStudio](#)



4

Intelligent, interactive engagement.



Leaders also aren't standing still when it comes to upgrading their engagement mechanisms, especially chat and webinars.

Chat, done right, can be far more effective than static landing pages and forms, with marketing getting higher-quality opportunities to sales sooner and more seamlessly. Meanwhile, webinar participation represents one of the deepest levels of engagement you'll find among online marketing channels. And AI promises to take both chat and webinars to the next level.

Both of these activities, though, have traditionally been managed by dedicated platforms rather than marketing automation. Many of today's marketing leaders are evaluating the benefits of transitioning from separate third-party chat and webinar tools to capabilities built right into their MAP.

Leaders weigh in on built-in chat and webinar capabilities.

Chat and webinars were identified as key digital channels in last year's research. Leaders continue to work on maximizing their value.

Built-in chat is "important" or "critical"	87%
Built-in webinar delivery is "important" or "critical"	78%

“ We're marketers, we want to market. The less time we need to think about integrations, the better. We just want to get on and build amazing customer experiences and make an impact for the business.

John Watton

VP Marketing EMEA

VMware by Broadcom

Most recognized potential benefits of built-in chat and webinar capabilities.

- Eliminate integration complexities and cost.
- Automatically enrich person and account profiles based on activity.
- Automatically trigger or adjust nurture programs and retargeting based on activity.
- Automatically enable not just sales interaction and scheduling, but sales visibility to activity.
- Automatically adjust lead and account scoring and feed attribution calculations based on activity.

“ If it works, it’s a native integration, and it meets all our needs, I would say it’s our first choice versus going outside the stack.

Darren Greene

Director of Digital Marketing and Transformation
Destaco, a Dover company



Adobe Spotlight: [Adobe Dynamic Chat](#) and [Interactive Webinars](#), both built into [Adobe Marketo Engage](#)

Hello, Pamela.

Hello. I'd like to schedule a meeting with an expert on your product.

Awesome, I'll connect you with a team member.

5

Modern marketing measurement.



Without dependable measurement that tells us what tactics and investments are driving pipeline, revenue, and ROI, we waste a lot of time and money. Without the ability to deeply understand step-by-step B2B customer journeys, we're unable to improve and optimize CX. That's not a winning plan because the top three objectives of B2B marketers are exactly these three things: to drive growth, to do it efficiently, and to deliver a great CX.

Importantly, doing these things well takes the tools to *do* marketing, but also the tools to *measure* marketing. Thankfully, the technology exists today to do both and do them far better than before. As a result, leaders are ditching their DIY measurement processes and nightmares for automation, AI, and purpose-built analytics.

In last year's research, we found that over 90% of B2B teams planned to work on improving their attribution in the coming year. This improvement most often happens along a predictable maturity path from single-touch attribution, to campaign-centric multi-touch attribution, to every-touch attribution powered by AI. Meanwhile, the visibility to customer journeys available through core MAPs is now augmented by a new category of customer journey analytics applications.

“ We'll probably be evolving our attribution. We'd love to bring AI into it since that's the next logical step.

Vladlena Mitskaniouk
Head of Demand Generation
Solo.io

Marketing attribution and analytics remain in the spotlight.

Better attribution is "important" or "critical"	95%
Better campaign analytics is "important" or "critical"	98%
Better journey analytics is "important" or "critical"	97%

Most recognized potential benefits of AI-powered marketing attribution.

- AI can deliver higher accuracy by removing the bias and guesswork of traditional rules-based modeling and replacing it with the superior pattern recognition needed to extract insights from complex B2B data.
- AI can more easily manage multiple machine learning models for different segments such as different order types, business units, or regions where the best marketing tactics will most likely differ.
- AI can more easily perform incremental attribution, which is the ability to remove background effects on revenue to focus performance measurement more specifically on marketing and sales investments, campaigns, channels, and content.



Adobe Spotlight: [Adobe Marketo Measure](#) and [Adobe Customer Journey Analytics](#)

“ It’s amazing how your relationships with Sales can build when you can give them insights and data that mean something to them.

Robert Gillespie

VP of Marketing, JP Morgan Chase

In closing.

If you're not among the leaders, there's no shame in following them—and eventually passing them. If you already work in a high-performance B2B marketing team, you know that buyer needs and technology never stop changing.

Today's marketing leaders are very focused on the future this year and how they can capitalize on a wide range of emerging technology changes—especially those we outlined in the five “Secrets to success” sections. The vast majority of our conversations were as much about what happens in core marketing automation as they were about the larger evolution of B2B MarTech.

Overall, **90% of respondents said they were satisfied with their current MAP.**

At the same time, 29% said they were “somewhat likely” to switch. When asked why, their answer wasn't surprising.

With B2B marketing maturing and most organizations leaning into innovation, better features and integrations topped the list. While price, ease of use, and customer service remain critical, **most are “trading up” to more powerful platforms which unlock more of their marketing potential through more advanced capabilities.**

In closing, thank you to all interview participants and the hundreds of survey respondents. Thank you especially to our Adobe customers. We look forward to writing the next chapter of marketing automation with you.

“ We're getting the value we need from marketing automation, but there's even more that I think we can get out of it.

Steve Armenti

Group Manager,
Global Demand Generation
Google



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