

NEW RESEARCH

The 2023 State of Marketing Automation from the B2B Perspective



insightly

Research created in partnership with Ascend2

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Survey Respondent Demographics

Company Size

More than 500	33%
50 to 500	41%
Fewer than 50	26%

Primary Role in Company

Owner / Partner/C-Level	33%
Vice President / Director Manager	51%
Non-Management Professional	16%

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.

INTRODUCTION

The 2023 State of Marketing Automation from the B2B Perspective

Business-to-business (B2B) marketers are tasked with creating effective customer journeys that identify, engage, and inform prospects to build pipeline for sales and ultimately generate revenue for their business.

Marketing automation can make this process significantly more efficient when utilized effectively. But how are B2B marketers taking advantage of automation tools today to improve their bottom line?

To help you answer this question, Ascend2 and Insightly fielded The 2023 State of Marketing Automation Survey in February, 2023.

This report, titled The 2023 State of Marketing Automation from the B2B Perspective, represents the opinions of the 198 marketing professionals responding to the survey who operate exclusively in the business-to-business (B2B) space.

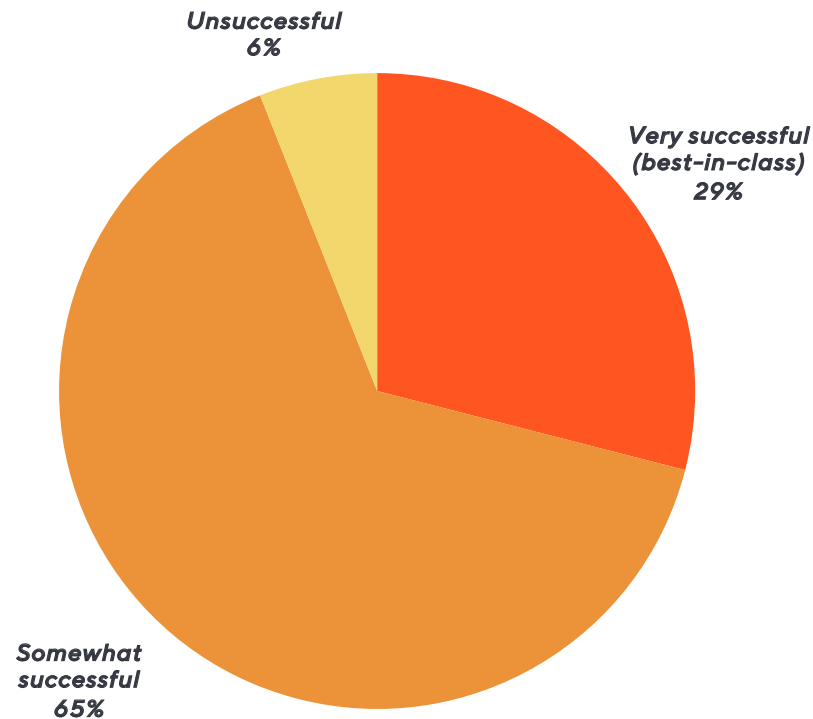
This research has been produced for your use. Put it to work in your own marketing strategy. Clip the charts and write about them in your blog or post them on social media. Please share this research credited as published.



Gauging Success

Is the automation that B2B marketers are using helping them to achieve strategic goals? An overwhelming majority (94%) say yes, to some extent. But only 29% report that their marketing automation is very successful, or best-in-class, compared to the competition, suggesting that there is room for improvement in the automation tools marketers are using and also in the ways that it is used.

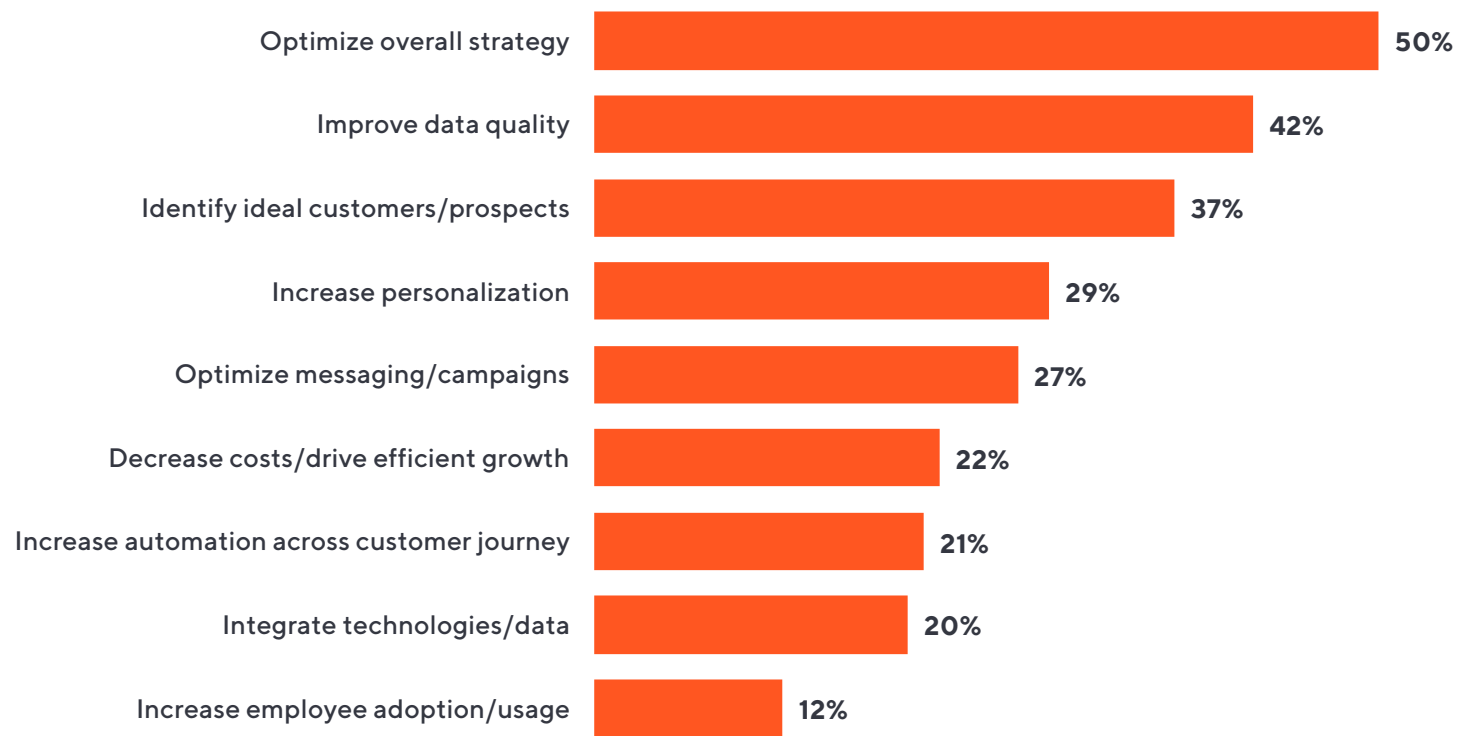
Rate the success of your marketing automation in helping you to achieve marketing objectives.



Primary Goals for Automation

How are B2B marketers trying to improve their use of automation in the coming year? According to half (50%) of those surveyed, optimization of their overall automation strategy will be a primary goal in the year ahead. Improving data quality and identifying ideal customers and prospects will also be top objectives for improving automation in the year ahead according to 42% and 37% of those surveyed, respectively.

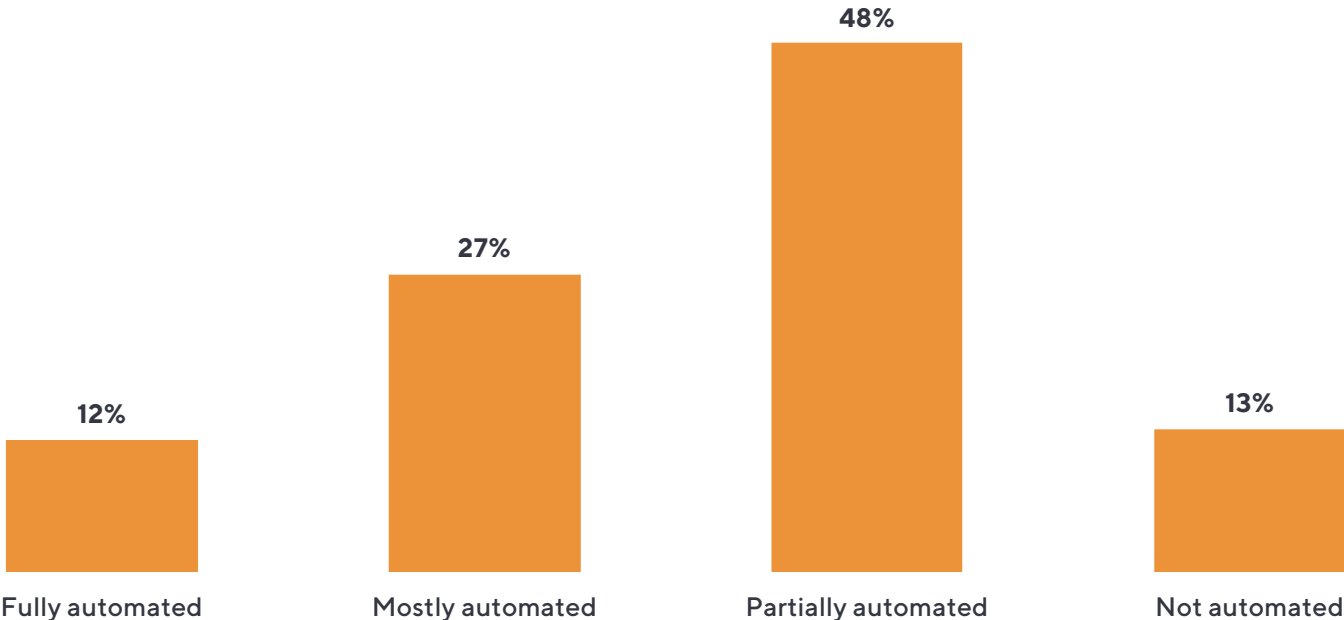
What are your primary goals for improving your marketing automation in the year ahead?



Extent of Automation

While very few (13%) B2B marketers report having no automation throughout their overall customer journey, nearly half (48%) of those surveyed say they have some, or partial automation throughout their customer journeys. 39% of B2B marketers have customer journeys that are mostly or fully automated according to our research.

To what extent is your overall customer journey AUTOMATED?

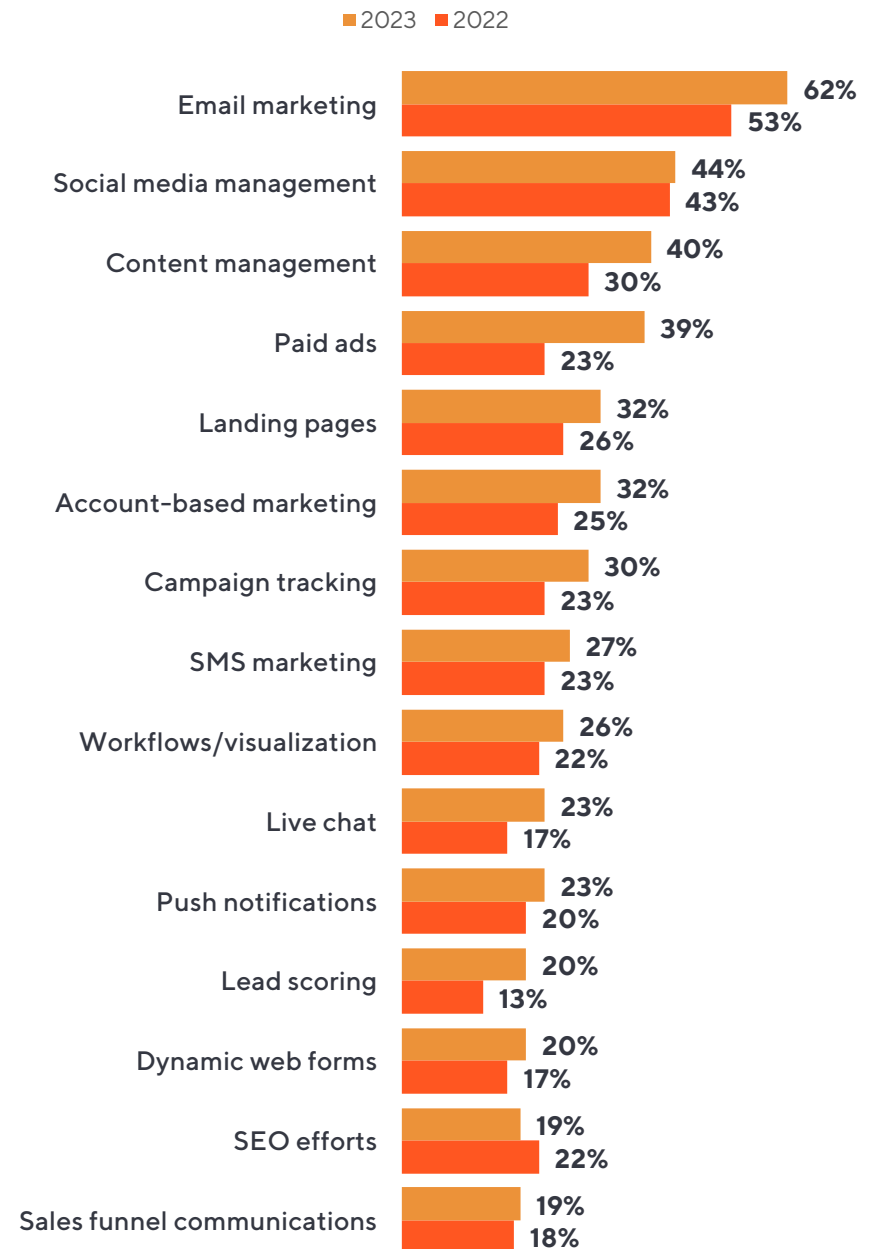


Current Use of Marketing Automation (2023 vs 2022)

There have been significant changes in how B2B marketers are using automation in the last year. The use of automation has increased significantly since last year in areas that include email marketing (53% to 62%), content management (30% to 40%), paid ads (23% to 39%) and lead scoring (13% to 20%). The only area that saw a decrease in the use of automation in the last year is SEO efforts which 19% of B2B marketers are still currently executing automation in.

*The State of Marketing Automation 2022 Survey Summary Report can be found [here](#).

In which of the following areas do you currently utilize marketing automation?



Planned Use of Marketing Automation

Where among their efforts are B2B marketers planning to implement the use of marketing automation in the coming year? 31% of B2B marketing professionals surveyed are planning to add automation to their social media management and email marketing initiatives in the year ahead. Other areas that top this list are paid ads (28%), landing pages (26%), and SMS marketing (26%).

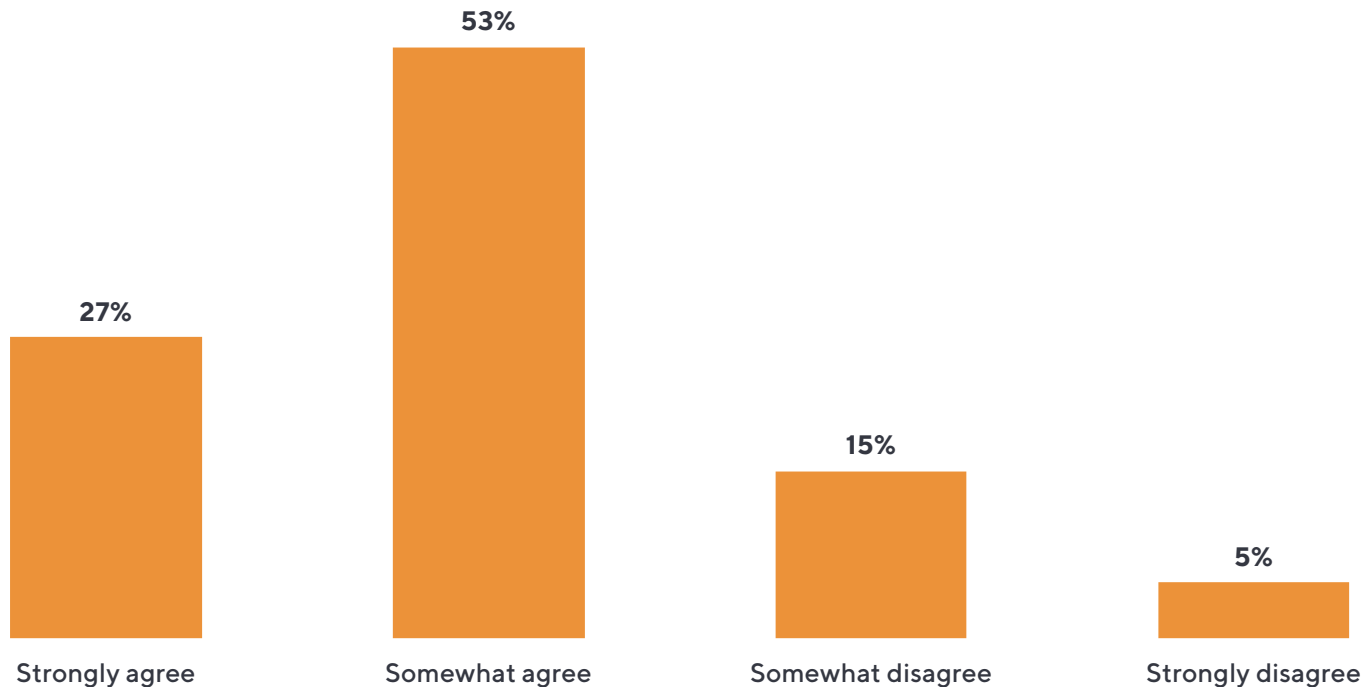
In which of the following areas do you plan to add marketing automation in the coming year?



Building Effective Customer Journeys

Marketing automation platforms should facilitate the development of engaging customer journeys, but only about one-quarter (27%) of B2B marketers surveyed strongly agree that their automation tool does this. Just over half (53%) of those surveyed somewhat agree leaving one-in-five (20%) B2B marketers who have marketing automation platforms that do not make it easy to build effective customer journeys.

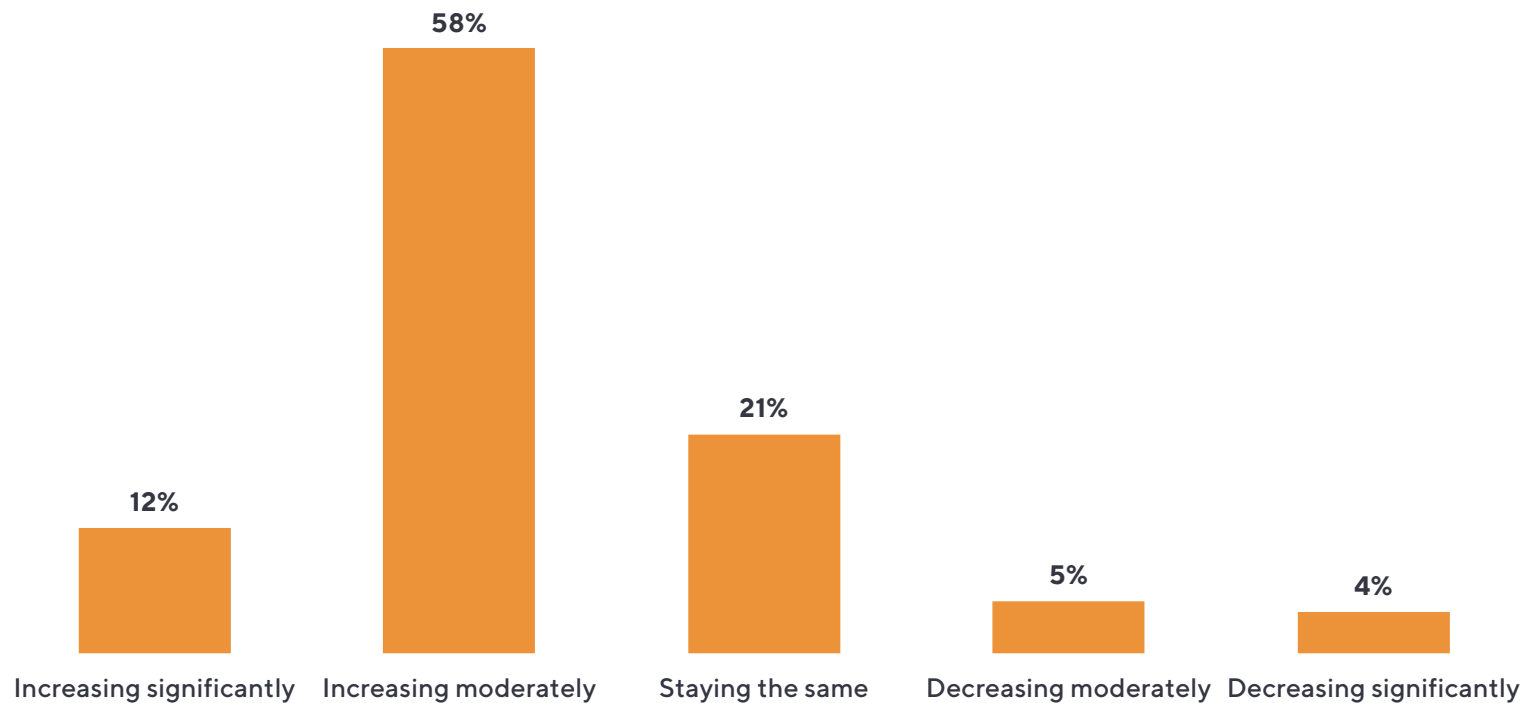
My marketing automation platform makes it easy to build effective customer journeys.



Budget Trends

Overall, budgets for marketing automation are trending upward according to 70% of B2B marketing professionals surveyed. Another 21% say that their marketing automation budget for the coming year will be staying the same leaving just one out of every ten (9%) B2B marketers reporting a decline in their budgets dedicated to automation in the year ahead.

How is the budget for marketing automation changing in the coming year?



About the Research Partners



Insightly is the modern, affordable CRM that teams love. It's easy to use, simple to customize, and scales with companies as they grow, solving common pain points that legacy CRMs can't. Powerful in any vertical, Insightly CRM customers can add companion products for marketing automation, customer service, and integrations in the same platform. Insightly is trusted by more than a million users worldwide. For more information, visit insightly.com.



Companies partner with Ascend2 to create original research, from survey conceptualization through report and content creation to media outreach. Ascend2 helps companies fuel marketing content, generate leads, and engage prospects to drive demand through the middle of the funnel.

[Learn more about Ascend2.](#)