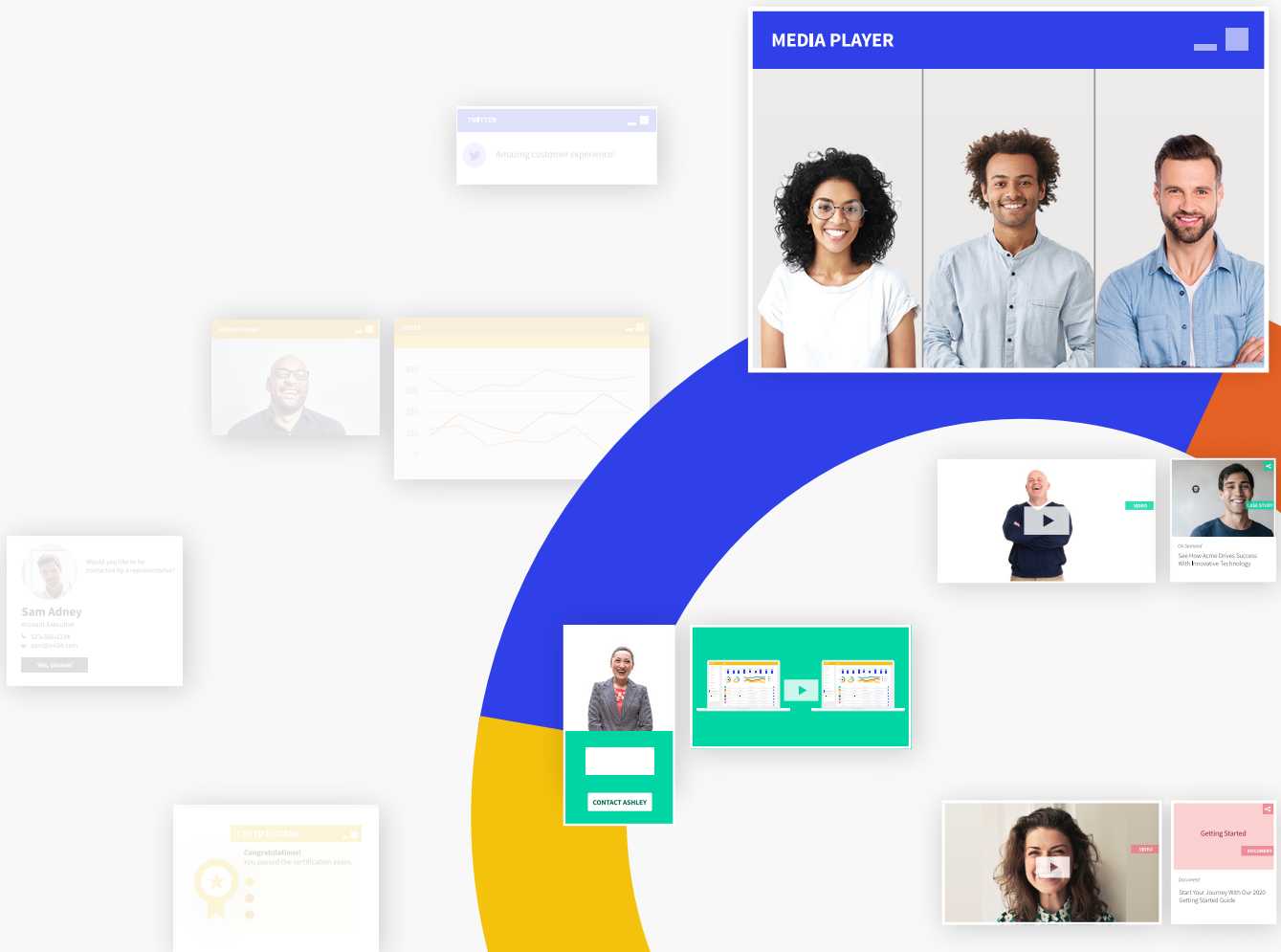


ON24
EXPERIENCES
EVERYWHERE

WHAT TOP-PERFORMING B2B MARKETERS DO DIFFERENTLY



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INTRODUCTION

Marketers today have access to a variety of technology solutions that can be used to create a great customer experience. From interactive content hubs to dynamic personalization and account-based marketing solutions, we have more tools at our fingertips today than would have been fathomable less than a decade ago.

But are we actually getting better results?

The evidence from this report says no. Our survey of marketing professionals reveals only 54% achieved a good level of success at meeting their 2019 goals.

The reality is that, as buyers work on their own terms and demand experiences similar to those they get in their personal lives, the tactics we've come to rely upon are failing. Some 58% of respondents agree that "outbound marketing tactics are becoming less effective" while a further 53% agree that "it's harder to drive results through funnel-based marketing."

So what should B2B marketers do differently?

To answer that question, we've compared the practices of the top-performing marketers that achieved their goals with those who have fallen behind.

In short, we can see that top performers market everywhere customers are. They provide more content on more channels, allowing each buyer to engage on their own terms. These top performers support the entire customer journey, rather than focusing purely on an acquisition. They report on engagement and focus on long-term wins. And as a probable consequence of all of this, they have a better relationship with sales and are far more likely to have a highly scalable marketing program.

As agreed by 85% of the marketers surveyed — and 91% of top performers — the future of great marketing will be synonymous with great customer experience.

METHODOLOGY

To understand the state of B2B marketing and how marketers are creating online experiences, Heinz Marketing, Market2Marketers and ON24 conducted an online survey in January 2020 of 137 B2B marketing professionals across various roles, industries and organization sizes.

The key aim was to discover what separates top-performing marketers from the rest. To do this, respondents were asked to rate how successful their marketing program was in meeting its goals for 2019 on a seven-point scale. Those answering six or seven were deemed successful and are referred to as “Top Performers.” The rest are referred to as the “Mainstream.”

Within the report, the key differences in responses are highlighted, providing an insight into the strategies, practices and behaviors aligned with those marketers achieving success in their roles.

KEY FINDINGS

B2B MARKETING SUFFERS FROM A PERFORMANCE GAP

The research reveals that **marketers are in strong agreement about the potential and importance of today's marketing practices.** Almost all (98%) agree that “a high-quality marketing experience is critical for business success.” Some 93% agree that “stronger engagement results in a stronger pipeline” while 92% agree that “interactive marketing leads to better engagement.”

Similarly, nine in ten (90%) agree that “personalization helps to break through the noise” and more than three-quarters (78%) agree that “account-based marketing is more effective than traditional marketing approaches.”

However, in all of these areas — customer experience, driving engagement, interactivity of content, personalization and account-based content — **a minority rated their performance as “excellent.”**

Further, **just 54% of marketers achieved a respectable degree of success** at meeting their goals in 2019. These “top performers” demonstrate a number of key differences between the “mainstream” marketers that failed to reach the same standard.

TOP PERFORMERS MARKET DIFFERENTLY

Across a number of areas, there are behaviors, practices and capabilities that top performers are far more likely to be demonstrating.

Experience and engagement

First, **top-performing marketers are much more likely to rate their customer experience as “excellent”** (58% vs. 27%) and a higher proportion reply similarly when it comes to driving engagement (45% vs. 21%).

Close to three-quarters (74%) say their **“marketing is everywhere where our customers are”** while **89% create dedicated materials that support the entire customer journey, not just acquisition.**

The majority (68%) report they are “very confident” **their marketing is relevant, personalized and timely**, compared to just 22% of other marketers. In terms of content formats, they demonstrate **higher levels of content usage** for seven out of the nine areas surveyed. In particular, their usage of **interactive tools such as surveys, quizzes and polls** (65%) far outstrips the adoption rates of marketers with lower rates of success.

They also use a **wider range of rich webinar formats** and support the modern buyer's desire to access content at any time, as half (50%) use simulive webinars compared to just 33% of other marketers.

Data and measurement

A greater share of top-performing marketers rate key engagement metrics as being among the most important to report on. A full 45% cite **prospect engagement metrics** (vs 29% for other marketers) and 41% list **account engagement metrics** (vs 30%) as key in assessing the performance of go-to-market programs.

Some 88% also agree **they focus on long-term metrics as much as short-term ones** — a figure 15 percentage points higher than the mainstream.

They are more than four times as likely (34% vs. 8%) to remark that **measuring and reporting on their marketing program’s performance is “very easy”** and almost two-thirds (64%) are “very confident” in the accuracy of their measurement.

Demand and sales

Marketers with the highest levels of success demonstrate stronger alignment with their colleagues in sales at a strategic level. The vast majority (92%) say **“sales agrees that marketing is aligned with revenue objectives and goals”** compared to just 63% of the mainstream.

Top performers are also more likely to be **providing content that helps their sales colleagues have intelligent and relevant conversations** with prospects, from primary research (55% vs 40%) to commercial insights (53% vs 37%).

The leads they provide are also of a higher quality. Eight in ten (80%) agree that **“sales believes the MQLs we send them are viable and truly qualified”** compared to less than half (49%) of other respondents.

They are also more than four times as likely (57% vs. 14%) to boast that **their marketing program is “highly scalable.”**

KEY CHALLENGES HOLD OTHER MARKETERS BACK

Marketers who don’t achieve the same levels of success suggest **falling engagement rates and too much noise from competitors** holds them back. In fact, in both of these areas, more than one-third (35%) say these two factors hurt their marketing efforts in 2019.

These same marketers are also more likely to struggle with **generating interest with their target audience**, with 60% listing this as a barrier to driving consistent, reliable engagement throughout the sales funnel. Around half (49%) also said they struggled with **converting interest into demand**.

Across marketing as a whole, close to one-third (32%) of marketers with lower levels of success listed **limited or poorly integrated technology** as one of their top three barriers. Just 19% of top performers replied similarly, suggesting that they are getting more out of their technology stack.

B2B MARKETING NEEDS TO CHANGE FOR THE FUTURE

While nearly three-quarters (73%) of top-performing marketers are “very confident” at hitting or exceeding their goals for 2020, the mainstream is nowhere near as bullish.

Examining the attitudes towards today’s marketing between top performers and the rest suggests that **a mindset shift is required among many less-successful marketers**.

Even though they are more likely to complain about noise and falling engagement rates, they are not as likely to agree about the changing nature of marketing — namely that **outbound tactics and pure funnel-based approaches are becoming less effective**, a position held by the majority of top performers. Mainstream marketers also appear to be significantly less aware that **increasing regulation will necessitate a change** in how marketing currently operates.

Furthermore, customer experience will become even more important, as 91% of top performers agree that in the future, **great marketing will be synonymous with great customer experience**.

EXPECTATIONS VS. REALITY IN B2B MARKETING

B2B marketing has come a long way since the start of the digital era, as technology offers the promise of reaching customers anytime and anywhere. Numerous research reports highlight the benefits that tools can offer, in addition to demonstrating the crucial role they play for today's buyers.

Indeed, respondents to this survey recognize both the necessity and potential to drive results across a number of areas, from customer experience to account-based marketing.

WHAT MARKETERS AGREE THEY SHOULD BE DOING

Customer experience

Customer experience is a topic on the lips of many marketers. In its predictions for 2020, Forrester notes that it expects the number of executives working in the field to increase by some 25%.¹

How B2B buyers are making purchasing decisions is propelling the drive to improve customer experience. And, since B2B buyers are consumers in their personal lives, expectations for similar experiences at work have increased. Research by PathFactory and Heinz Marketing backs this up, showing that B2B buyers prefer to search online as

they start the buying journey.² Salesforce, too, has found that more than eight in ten business buyers want the same experience as when they are buying for themselves.³

Therefore, it should come as no surprise that almost all (98%) of those surveyed in this study agree that “a high-quality experience is critical for business success.”

1. <https://go.forrester.com/predictions-2020/>

2. <https://nurturennow.pathfactory.com/c/pf-heinz-report-fina>

3. <https://www.salesforce.com/form/conf/state-of-the-connected-customer-2nd-edition/>

Engagement

Providing a high-quality experience by itself is unlikely to be sufficient in driving business results. For example, most marketing automation and lead scoring systems require engagement to assess and qualify a potential buyer, so that they can be passed to sales and become an opportunity.

The respondents to this recognize the value of engagement, with 93% agreeing that “stronger engagement results in a stronger pipeline.”

ON24’s own data also demonstrates the impact of stronger engagement. For example, webinar attendees with an engagement score of six or more are more than twice as likely to be accepted by sales, leading to a significant uplift in marketing’s contribution to pipeline.⁴

Interactive marketing

Some 92% of marketers agree that “interactive marketing leads to better engagement.” Naturally, experiences that go beyond static assets offer the opportunity to progress a buyer’s journey and open conversations.

For those using webinars, this is a regular occurrence. ON24’s latest Webinar Benchmarks Report data shows that more than eight in ten (81%) use Q&A, seven in ten (70%) offer resources for download and more than one in five (22%) take advantage of polling.

Personalization

Audiences can be overwhelmed with the sheer amount of information to consider online. Marketers need to stand out to cut through information overload. Here, personalization is an invaluable tactic.

According to our survey, nine in ten (90%) respondents say they agree that “personalization helps to break through the noise.”

Separate research confirms this as well, with ITSMA reporting that buyers prefer ideas personalized to them.⁵ On the flip side, some 41% of buyers complain that content is typically not relevant to their company.⁶

4. <https://www.on24.com/report-engagement-imperative/>

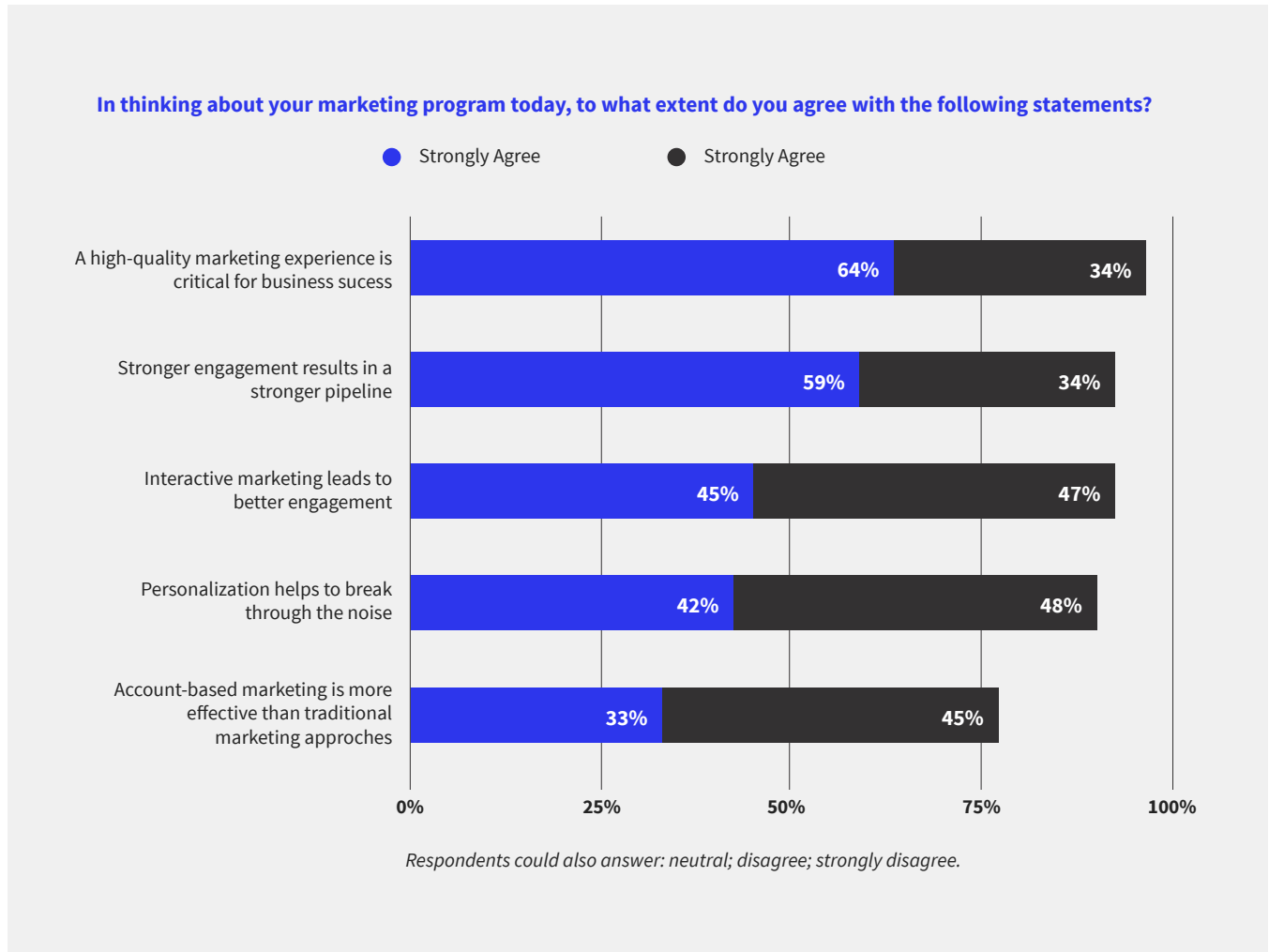
5. <https://www.itsma.com/effective-path-to-b2b-marketing-personalization/>

6. <https://nurturennow.pathfactory.com/c/pf-heinz-report-fina>

Account-based marketing

Given the challenges today's marketers have in connecting with prospective buyers, account-based marketing as a strategy has boomed over the past few years.⁷

More than three-quarters (78%) of marketers in this study agree that "account-based marketing is more effective than traditional marketing approaches."



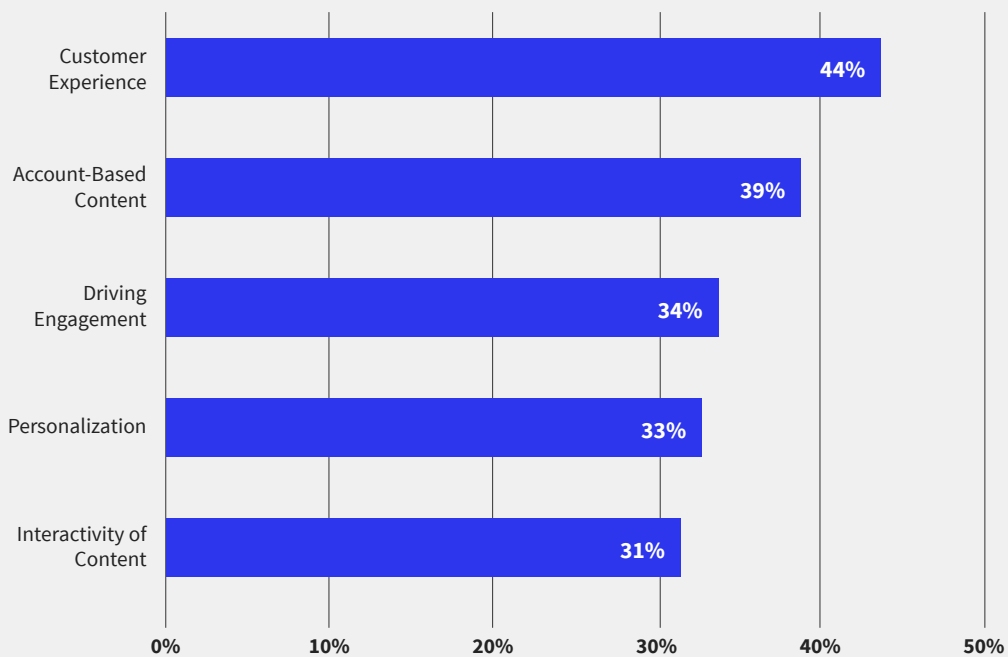
7. <https://www.on24.com/resources/assets/ebook-webinars-guide-account-based-marketing>

HOW MARKETERS ARE ACTUALLY PERFORMING

Marketing theory, however, doesn't always match with reality. Realizing the benefits of new approaches is another matter altogether.

When asked about their performance in customer experience, engagement, interactive marketing, personalization and account-based marketing, only a minority described their company's current performance as "excellent." The lowest percentages were seen in the areas of interactivity (31%) and personalization (33%).

How do you rate your current company's performance across the following areas? (percentage stating "excellent")



Respondents could also answer good; adequate; poor.

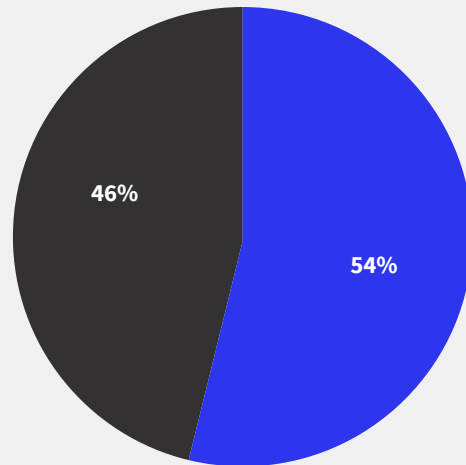
When compared, there is a noticeable gap between those who say a key marketing practice is important and those that rate their performance in these areas as “excellent.”

Key marketing practice	Importance score	Performance score	Performance gap
Customer experience	98%	44%	54%
Engagement	93%	34%	59%
Interactive marketing	92%	31%	61%
Personalization	90%	33%	57%
Account-based marketing	78%	39%	39%

Further, when asked how successful their marketing program was in meeting its goals for 2019, only 54% reported a good degree of success. So what are the practices that separate the successful marketers — the top performers — from the rest? We explore in the next section.

How successful was your marketing program in meeting its goals in 2019?

- Successful (Top Performers)
- Adequate / Not Successful (Mainstream)



Respondents were asked to rate performance on a scale from 1-7, with 7 being very successful. Those rating a 6 or 7 are deemed to be successful “Top Performers.” Those rating between 1 and 5 are classed as the “Mainstream.”

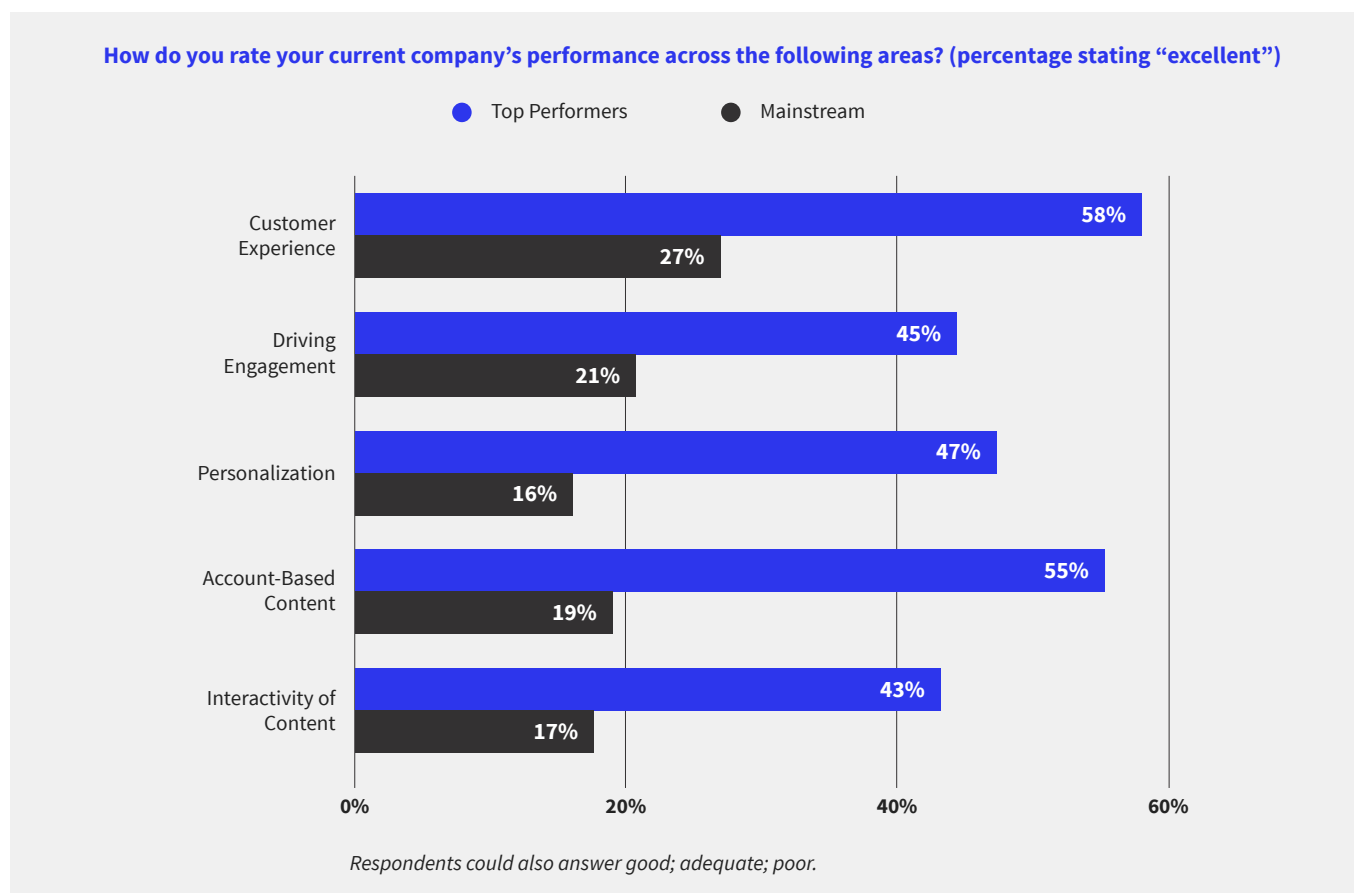
WHAT TOP PERFORMERS DO DIFFERENTLY

THEY DEMONSTRATE EXCELLENCE IN CUSTOMER EXPERIENCE AND DRIVING ENGAGEMENT

When it comes to customer experience and driving engagement, top performers are much more likely to describe their company's performance in glowing terms. As such, their performance gap is much smaller.

Almost six in ten (58%) of top performers describe their performance in the area of customer experience as "excellent" compared to just 27% of the mainstream respondents. Similarly, when it comes to driving engagement, more than twice as many top performers (45%) rate their performance in such terms versus the mainstream (21%).

Marked differences are also seen in the areas of personalization, the use of account-based content and content interactivity.

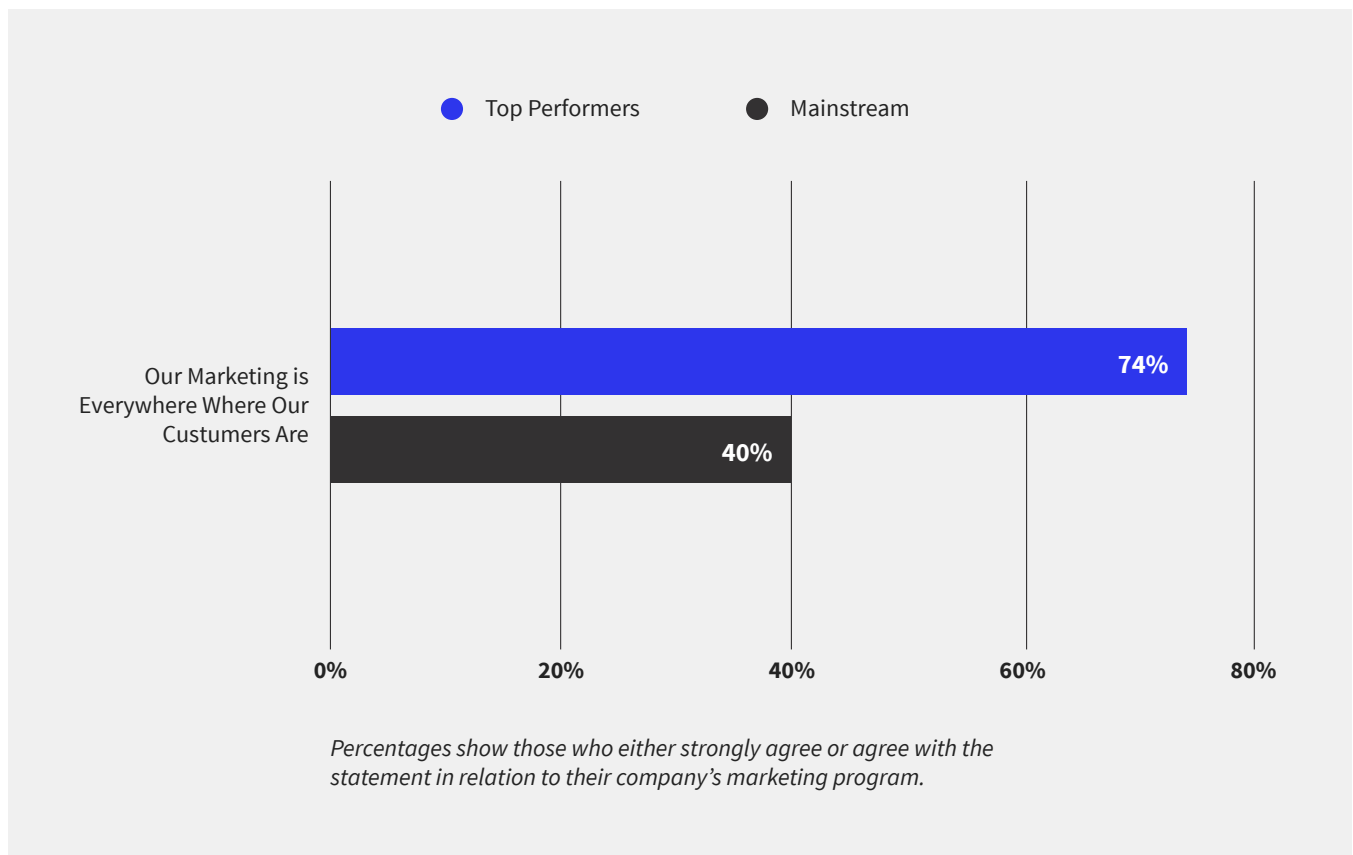


THEY MARKET EVERYWHERE THEIR CUSTOMERS ARE

Today's workforce can be anywhere. This applies to both their physical location and their presence online, as they move between different sites and switch between tools to get the job done.

As buyers search across the web to find solutions, they typically visit a variety of sites to collect information.

Top performers recognize this fact and make sure to broaden their reach. Close to three-quarters (74%) of top performers agree that "our marketing is everywhere where our customers are" compared to less than half (40%) of mainstream marketers.

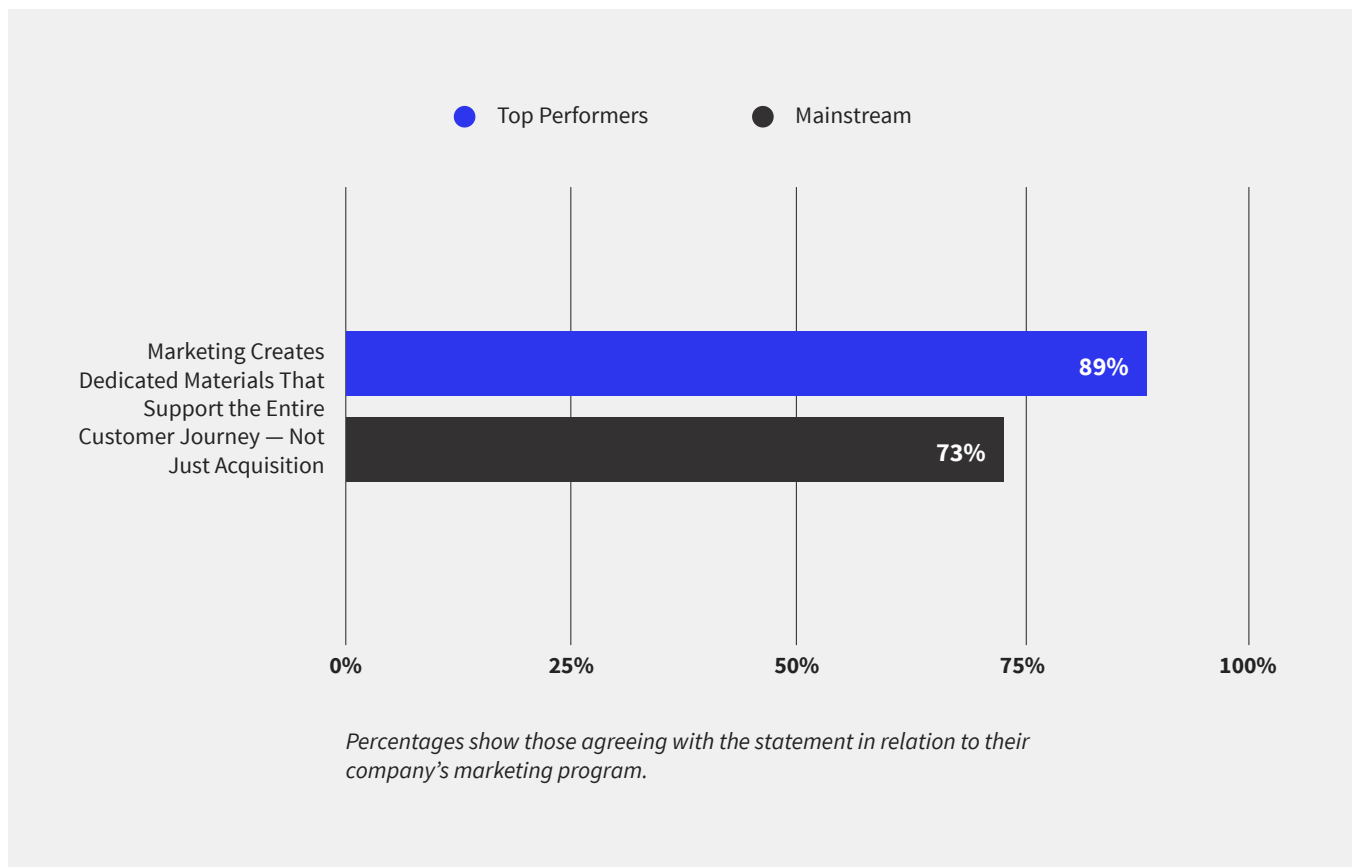


THEY SUPPORT THE ENTIRE CUSTOMER JOURNEY – NOT JUST ACQUISITION

Traditionally, B2B marketers focus their efforts at the top of the funnel. But buyers continue to interact with the experiences marketing creates well after they have been handed over to sales or customer success.

As custodians of the customer experience, marketers need to support the entire customer journey with materials and content.

Top performers are much more likely to do this, with 89% of them agreeing that their team “creates dedicated materials that support the entire customer journey — not just acquisition.”

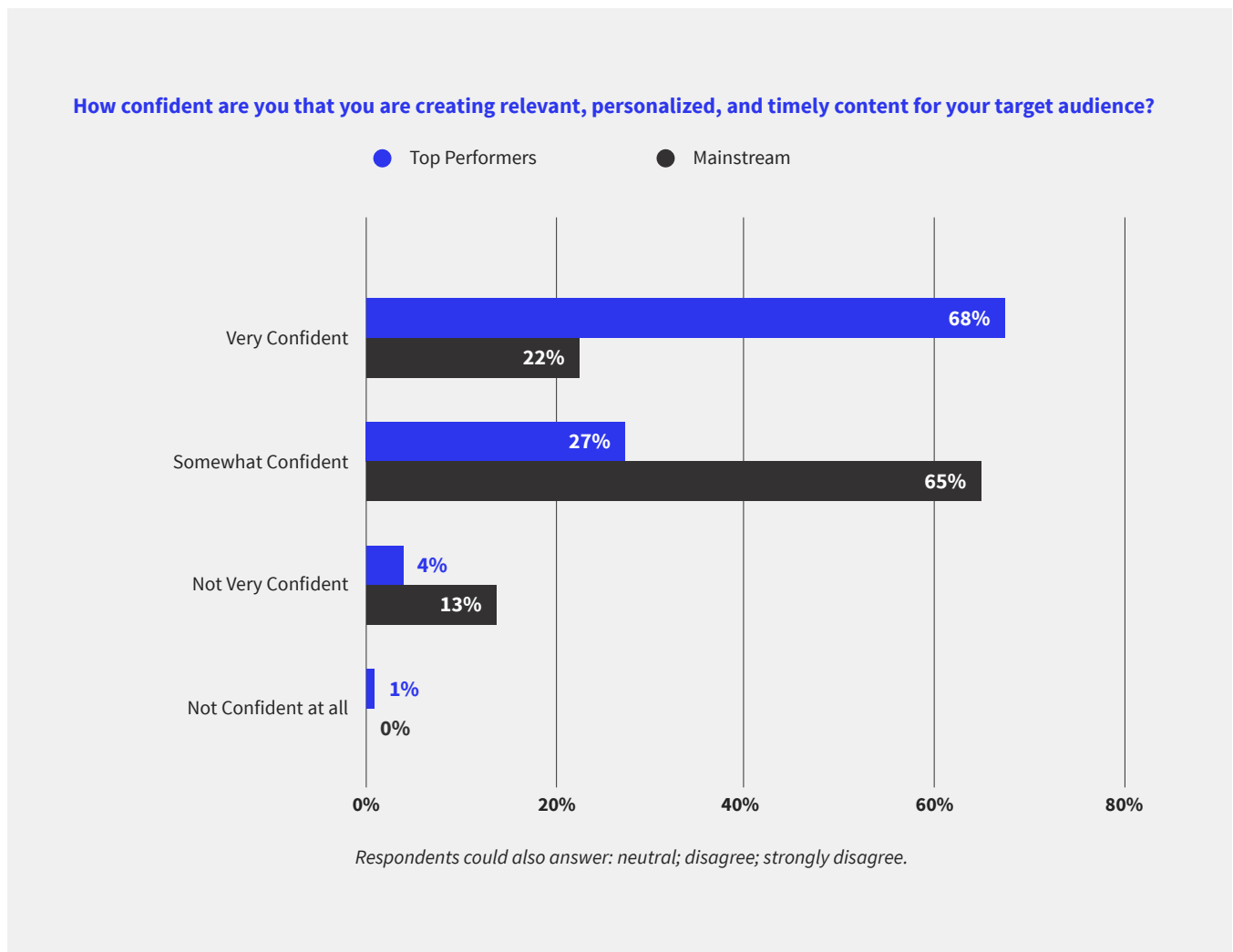


THEIR CONTENT IS RELEVANT, PERSONALIZED AND TIMELY

As will be covered later in this report, many marketers report challenges in relation to the amount of noise created by competitors, along with falling engagement rates from customers and prospects.

To stand out at the most crucial parts of the customer journey — for example, when a prospect is actually looking to solve a problem — content needs to be relevant, timely and personalized as much as possible.

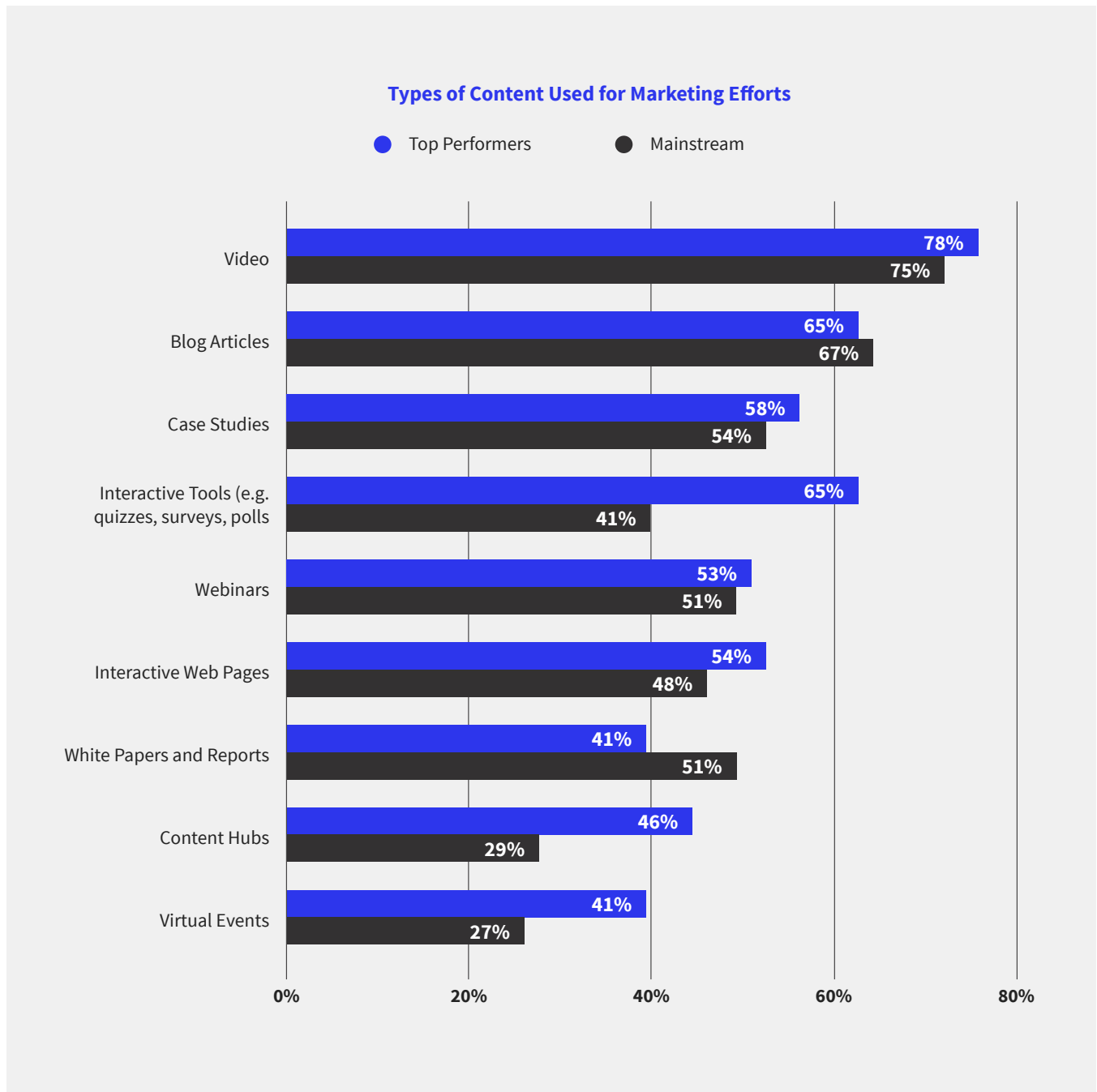
Top performers are significantly more confident they are providing the right content at the right time. More than three times as many (68%) say they are “very confident” in this respect in comparison to the mainstream (22%).



THEY USE MORE CONTENT ON MORE CHANNELS

The volume and variety of content also play a key role in today's marketing. As buyers engage on their own terms, the content that one person wants at a given time will be different from that wanted by another.

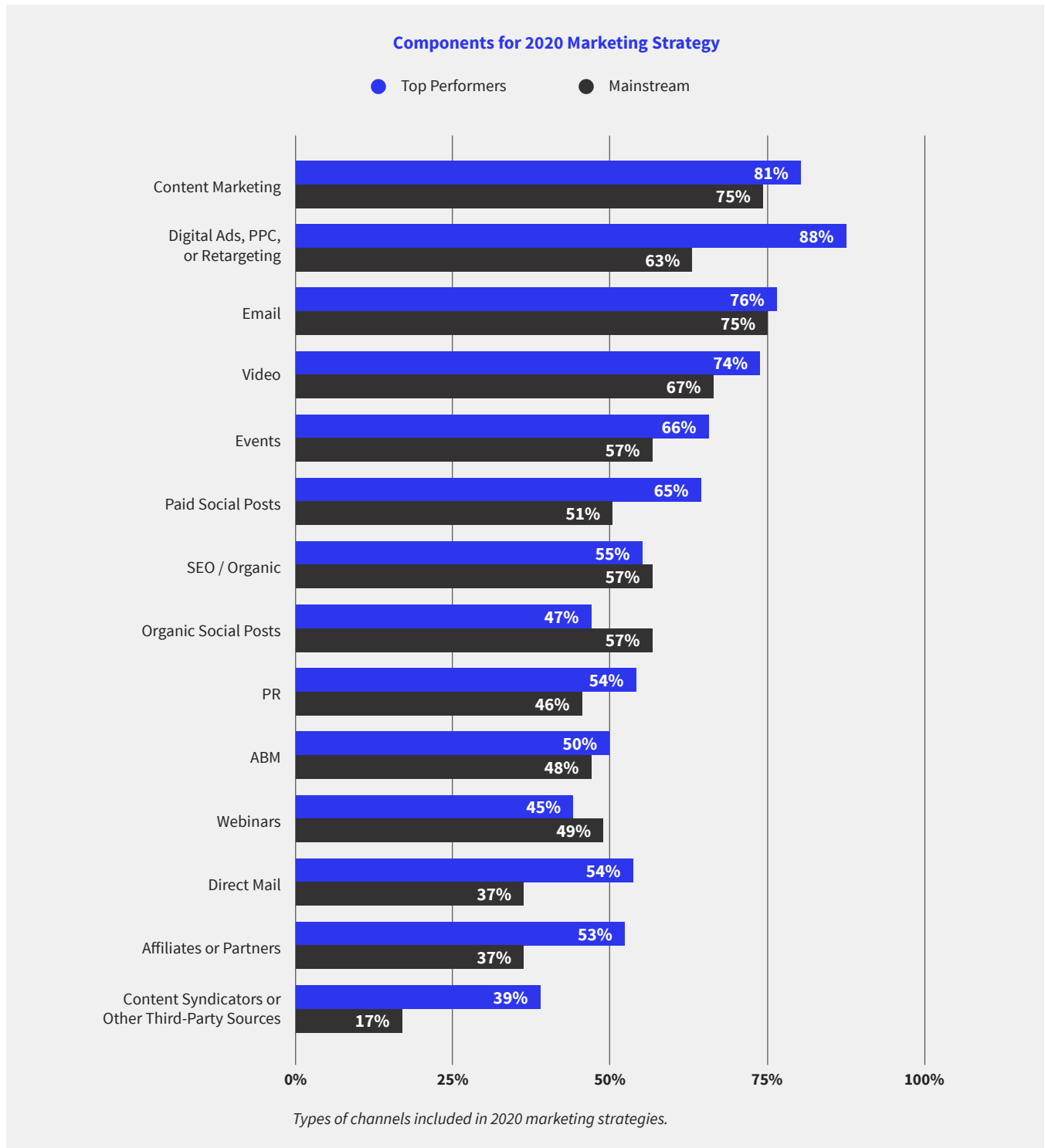
Of the nine content types investigated, top performers were more likely to use seven formats. In particular, they exhibit a strong lead in formats that encourage engagement, from interactive tools (65%) and interactive web pages (54%) to content hubs (46%) and virtual events (41%).



When it comes to the year ahead, top performers are likely to be maintaining this lead over the mainstream.

Respondents were also given 14 different marketing channels and were asked which of these would be included in their marketing strategy in 2020. Top performers were more likely to include 11 such channels in their strategy than mainstream respondents.

On average, top performers are incorporating 8.5 channels in their strategy for the coming year, while the remainder has 7.3.



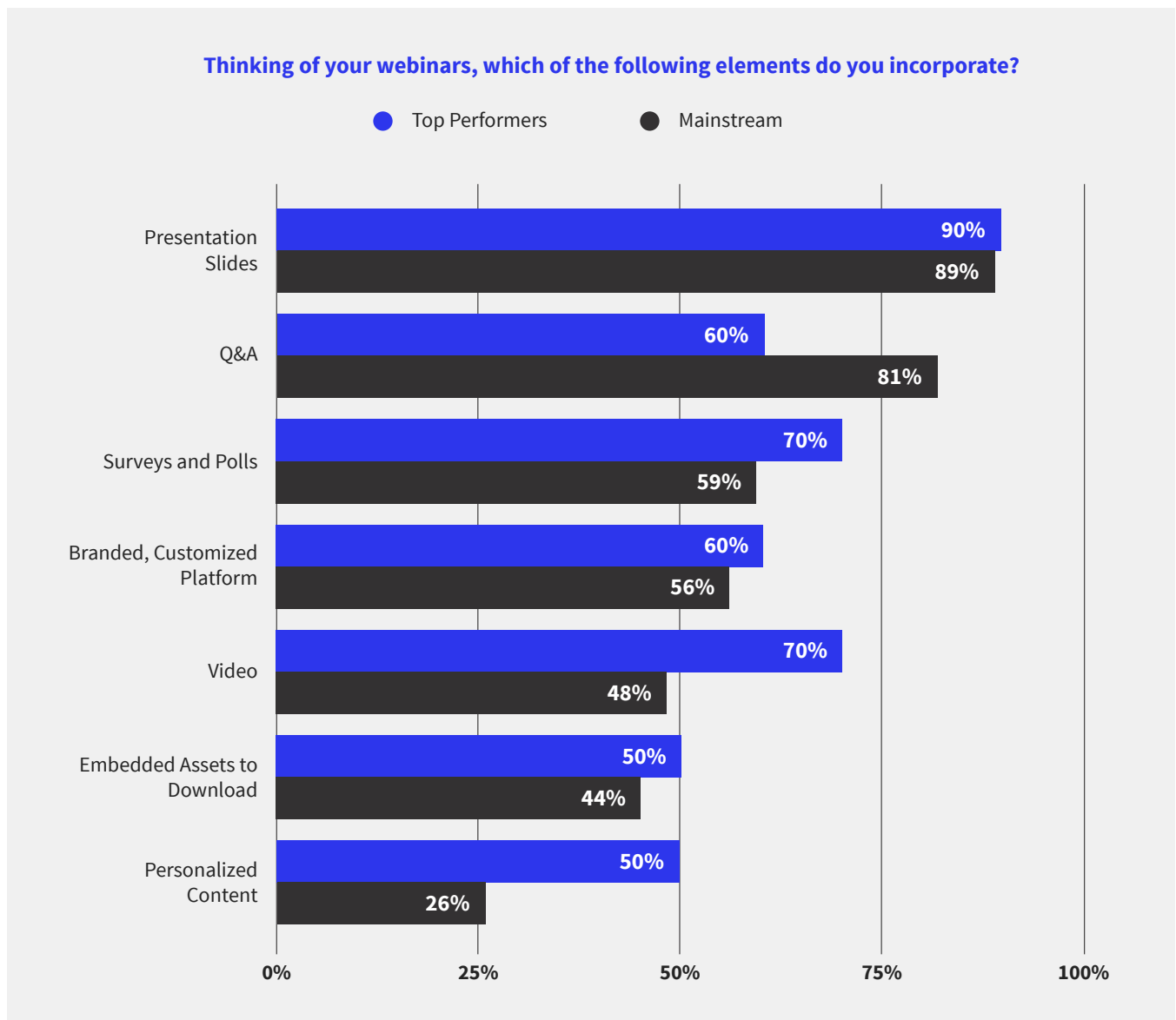
THEIR WEBINARS ARE RICHER AND MORE LIKELY TO BE SIMULIVE

Among the respondents using webinars, top performers are more likely to include options for interaction and improving the experience in six out of the seven areas surveyed, with the greatest differences in the use of video (70% vs. 48%) and personalized content (50% vs. 26%).

However, mainstream respondents are more likely to be using Q&A for their webinars. Why might this be the case?

The reality is that even though webinars have historically been seen as a live event, an increasing number of viewers are watching on-demand. In fact, according to ON24's 2020 Webinar Benchmarks Report, 38% of all webinar registrants watch webinars on-demand only.

Indeed, top performers recognize the value of broadcasting at different times, while also creating webinar experiences that offer a live feeling, as half (50%) of top performers use simulive webinars, compared to just 33% of the mainstream.

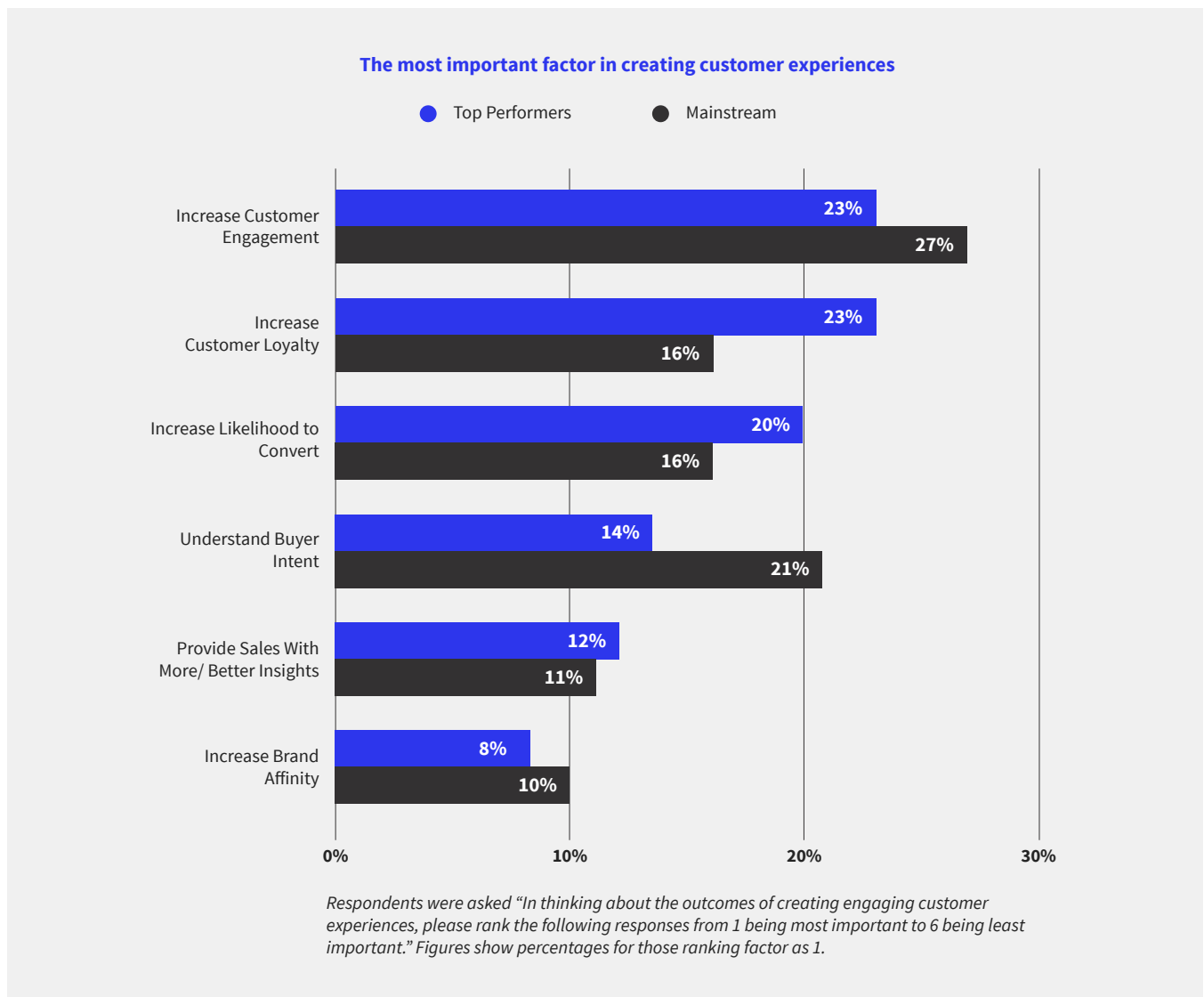


THEY RECOGNIZE THE BROAD NATURE OF CUSTOMER EXPERIENCE

When asked to list the most important factor in creating customer experiences, the most commonly cited option was to increase customer engagement, with 25% of all respondents choosing it as such. But mainstream marketers were more likely to go for this option (27%) than top performers (23%).

This may seem counterintuitive at first, but the data proves top performers are more likely to consider other elements such as customer loyalty (23% vs 16%) and the likelihood to convert (20% vs 16%). On the former point, Harvard Business Review research has found that organizations with higher levels of loyalty are much more likely to be maintaining customer experience levels across both live and automated channels.⁸

By contrast, mainstream respondents are more likely to choose "Understand Buyer Intent" (21%) than top-performing peers (14%). This approach, however, puts the cart before the horse, as understanding buyer intent is an outcome of measuring experience and engagement more than a driving factor. In the absence of engagement, intent cannot be measured.



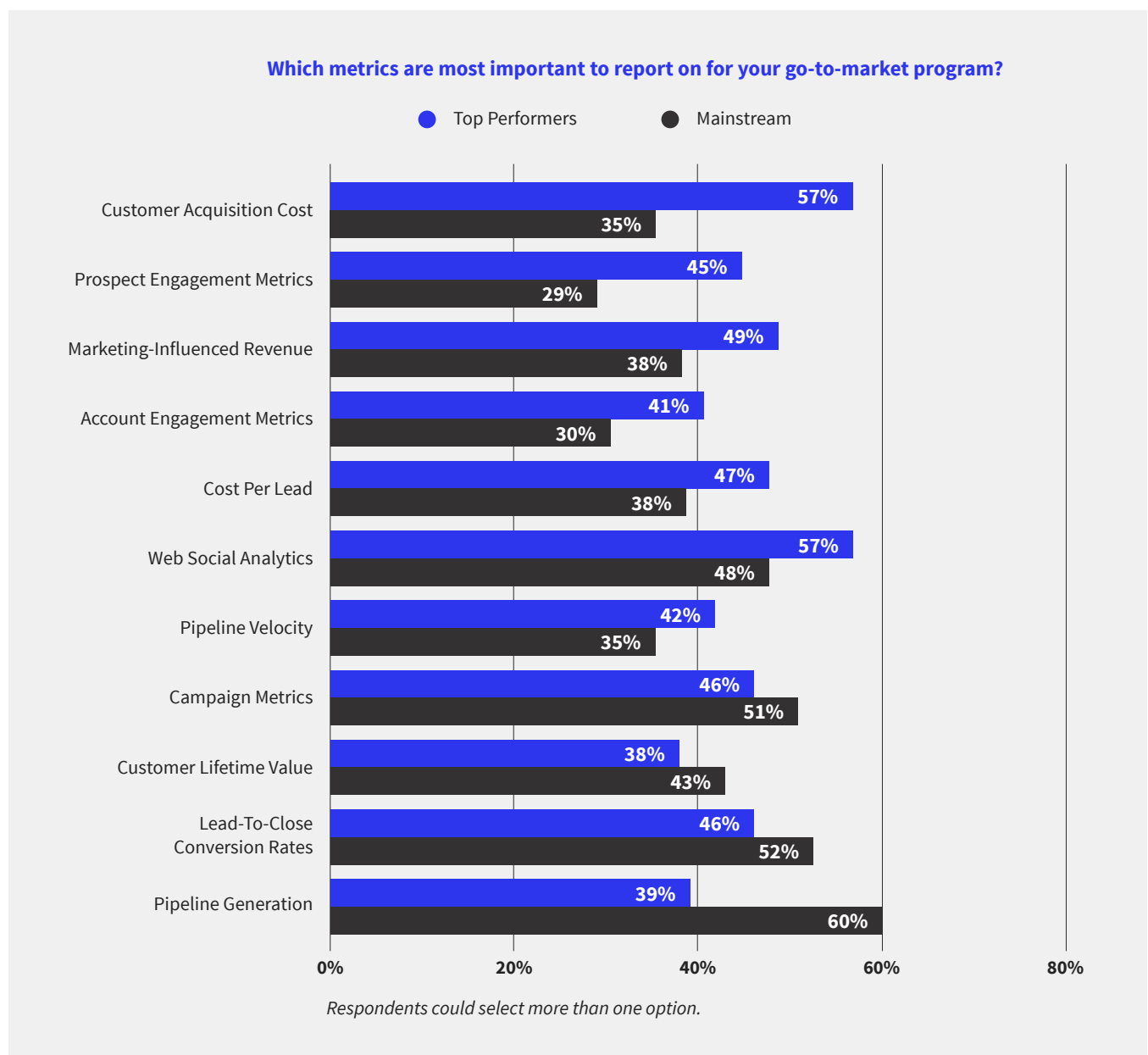
8. <https://www.on24.com/resources/assets/report-scaling-human-interaction-hbr/>

DATA AND MEASUREMENT

THEY REPORT ON ENGAGEMENT METRICS

Although every online interaction can be measured, it is not practical to report on every possible metric. So what are the most important metrics — and where do top performers have the edge?

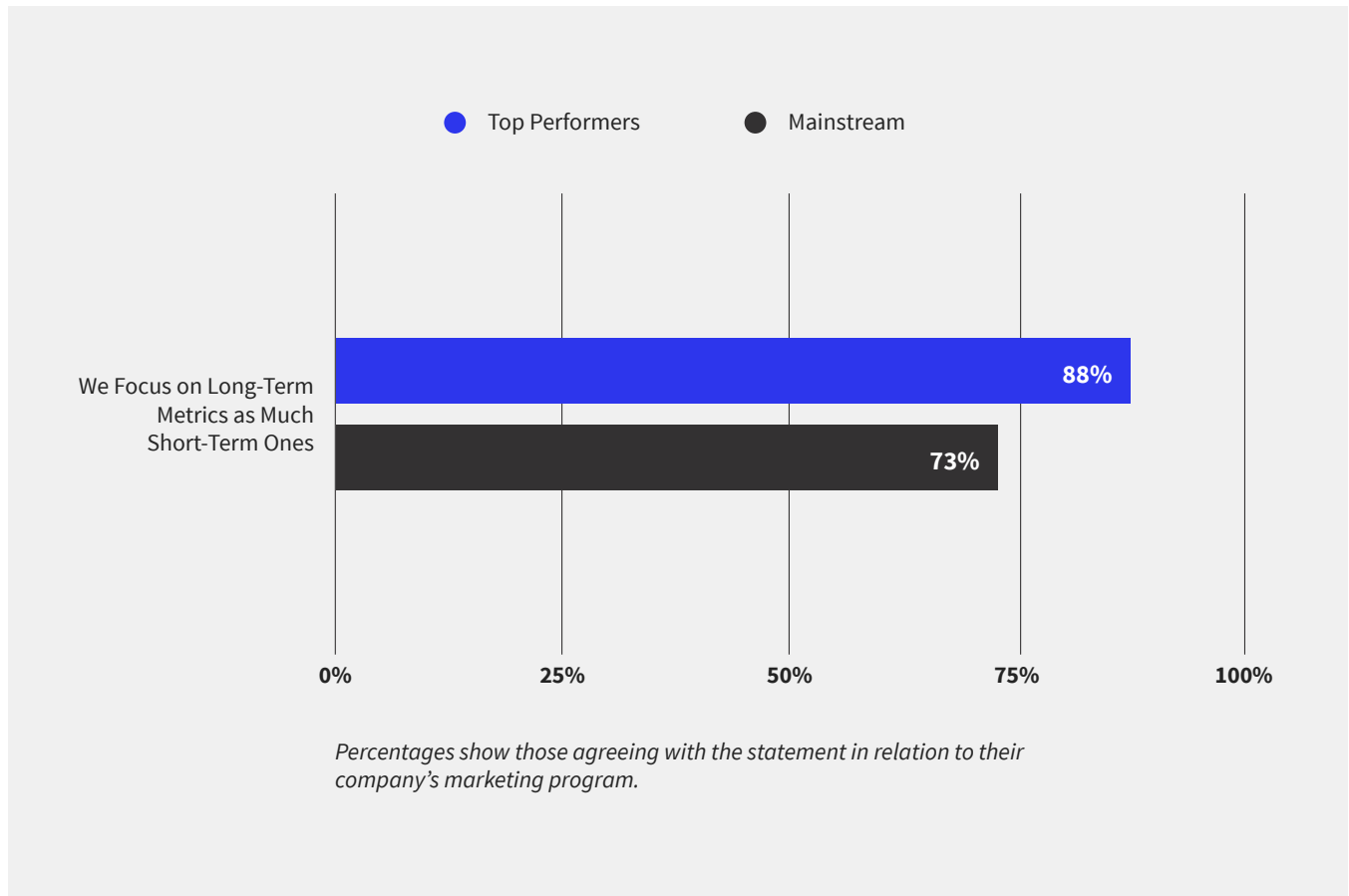
In addition to metrics tying marketing's impact on the bottom line — such as customer acquisition cost (57%), marketing-influenced revenue (49%) and cost per lead (47%) — top performers place a higher value on reporting engagement metrics, both at an individual prospect level (45%) and at the account level (41%).



THEY FOCUS ON THE LONG-TERM

Many marketers are caught between the need to provide quick wins while also building the foundations for future success. But attempting to drive results on the basis of short-term metrics doesn't reflect the lengthy nature of many B2B sales cycles. Indeed, LinkedIn research has found that while 77% of marketers try to prove ROI in a single month, the average B2B sales cycle is six months and up.⁹

Top performers are more likely to buck this trend, as 88% agree that “we focus on long-term metrics as much as short-term ones.”

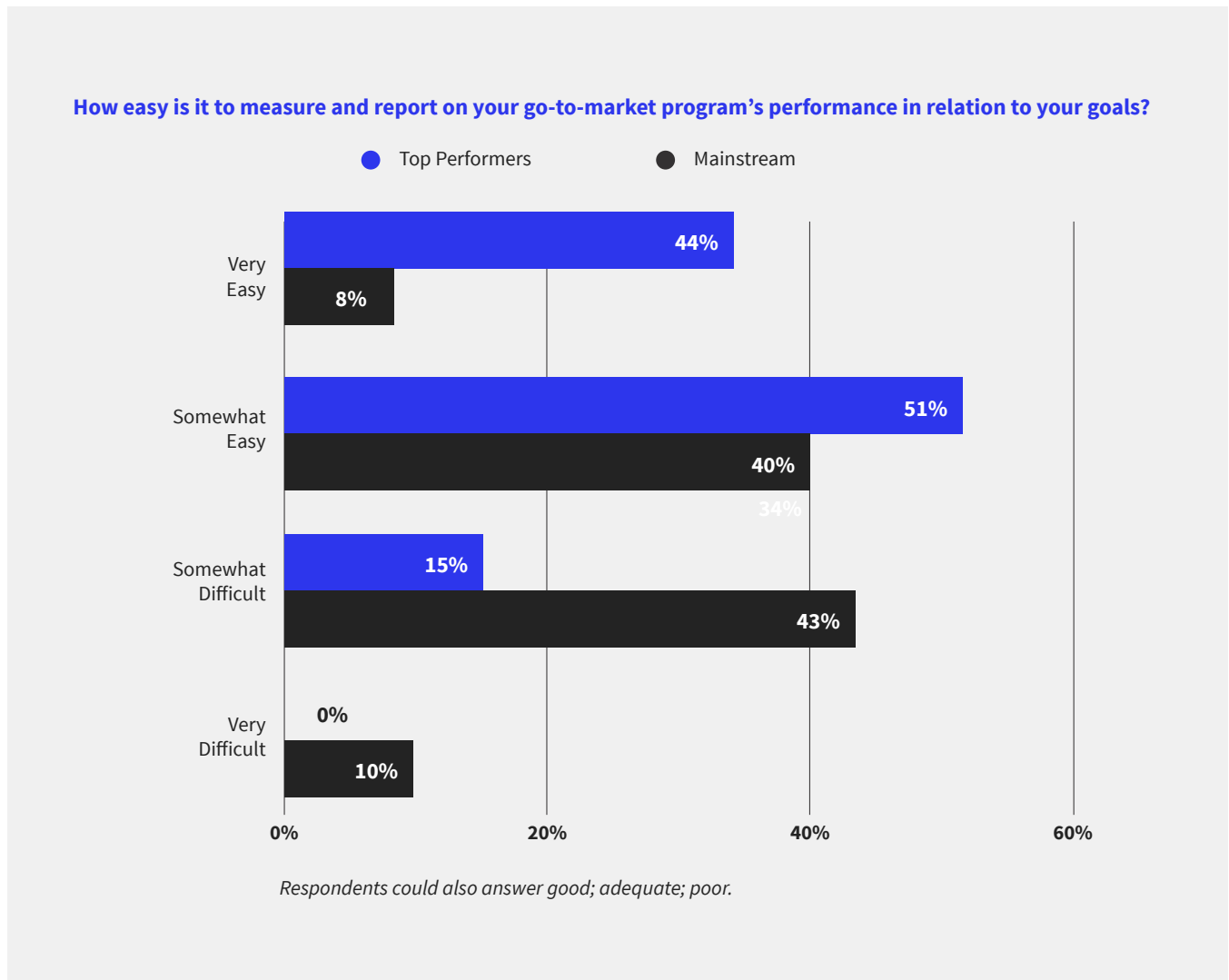


9. <https://business.linkedin.com/marketing-solutions/blog/linkedin-news/2019/the-long-and-short-of-roi>

THEY CAN MEASURE AND REPORT ON PROGRAM PERFORMANCE WITH EASE

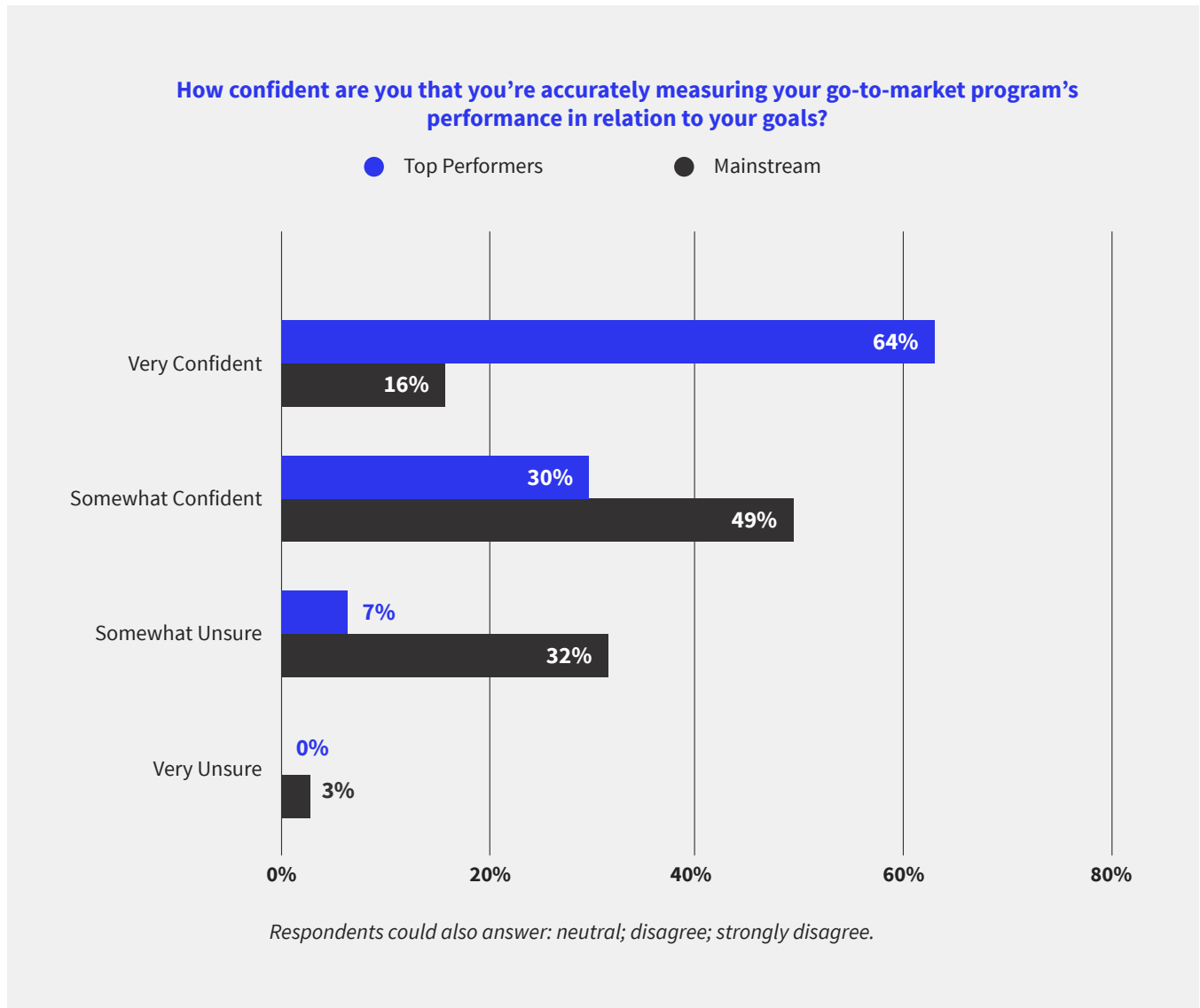
Often, marketers don't have enough time to do their jobs. So, it's no surprise many marketers want the process of collating and reporting results to be as quick and seamless as possible.

Once again, top performers have the edge over mainstream peers. Around a third (34%) of these top performers say measuring and reporting on goal performance is "very easy" – something applicable to only 8% of mainstream respondents.



THEY CAN BETTER TIE PROGRAM PERFORMANCE TO GOALS

In addition to the ease of reporting, top performers are far more confident in the reliability of their data. Close to two-thirds (64%) say they are very confident that they are accurately measuring their go-to-market program's performance in relation to their goals, compared to fewer than one in five (16%) mainstream respondents.



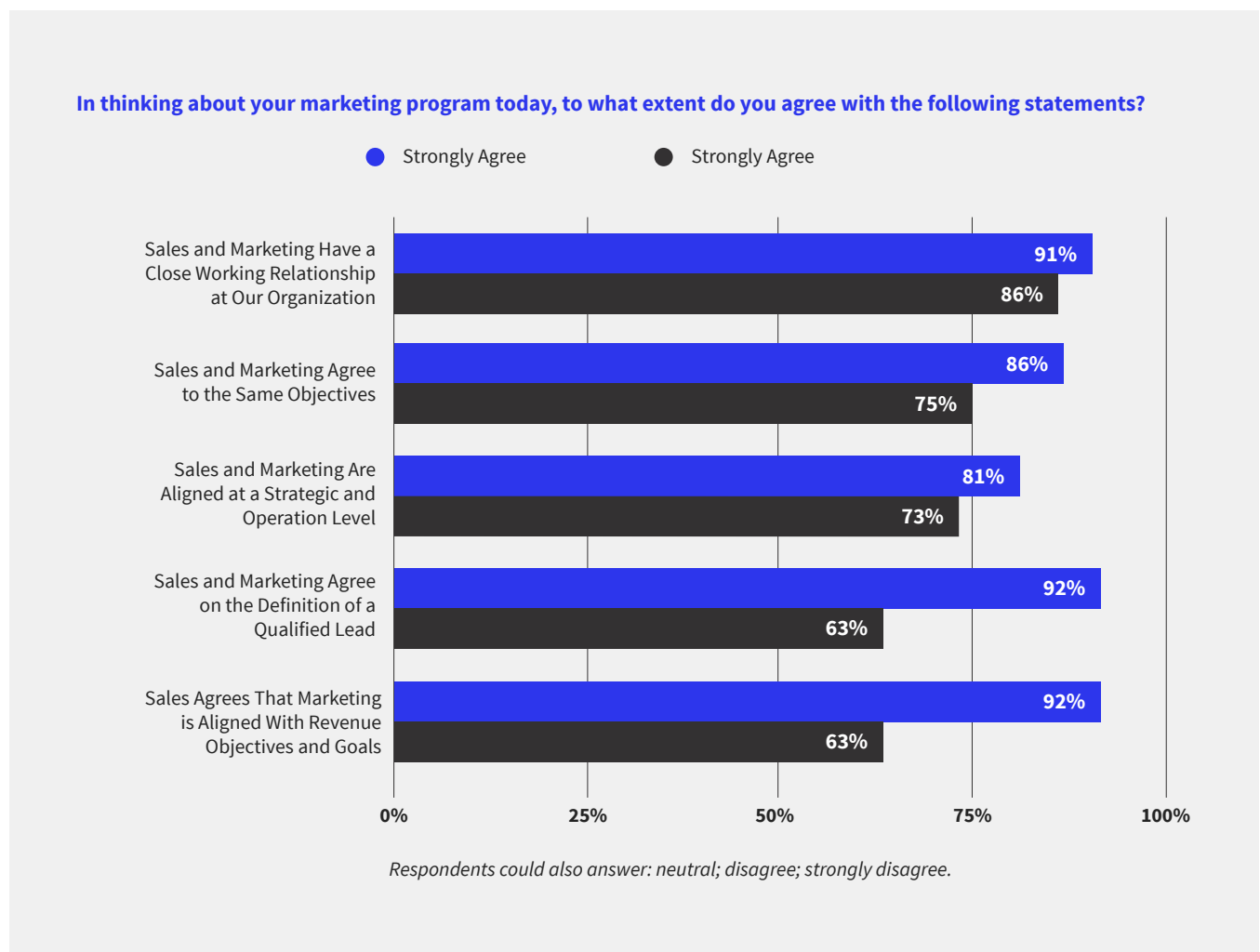
DEMAND AND SALES

THEY HAVE A BETTER RELATIONSHIP WITH SALES – AND PROVIDE THEM WITH MORE CONTENT

Although marketing now touches more of the customer journey today than before, the sales team still has to close deals.

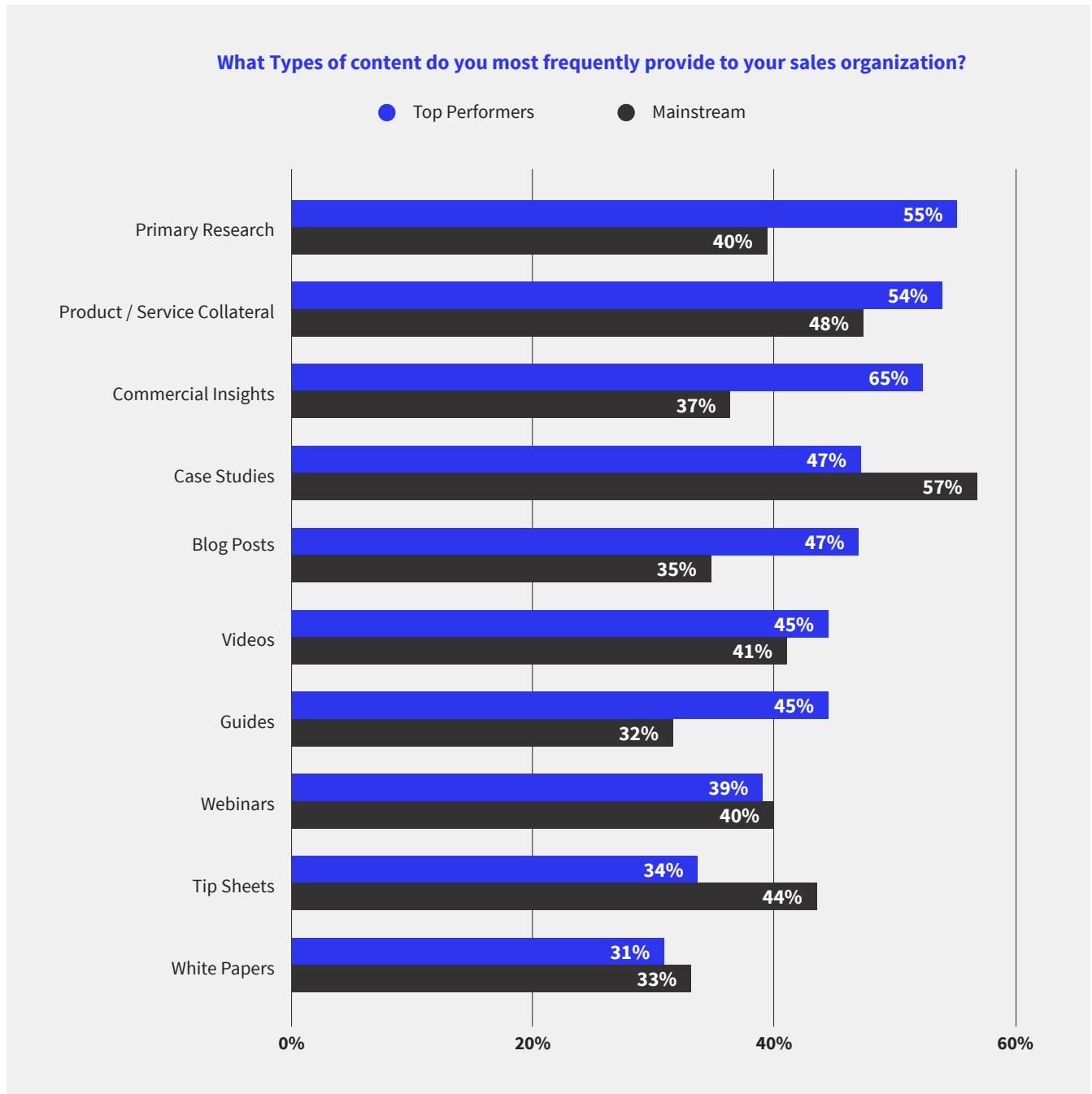
While the vast majority of both top performers (91%) and the mainstream (86%) say they have a close working relationship with sales, there is stronger alignment and agreement at the most successful firms.

In particular, some 92% of the top performers who met their 2019 goals state that “sales and marketing agree on the definition of a qualified lead” with the same figure confirming that “sales agrees that marketing is aligned with revenue goals and objectives.” For both of these areas, only 63% of mainstream respondents can say this is the case for their organizations.



Meanwhile, at the tactical level, top-performing marketers are also doing a better job at sales enablement. When asked what types of content they were most frequently providing, top performers chose an average of 4.5 options, while mainstream marketers chose only 4.1.

Top performers are also more likely to provide content that helps sales colleagues have intelligent and relevant conversations with prospects, from primary research (55%) to commercial insights (53%). Indeed, earlier research by ON24 and Demand Gen Report has shown two-thirds of B2B buyers want vendors to use more data and research in their content.¹⁰

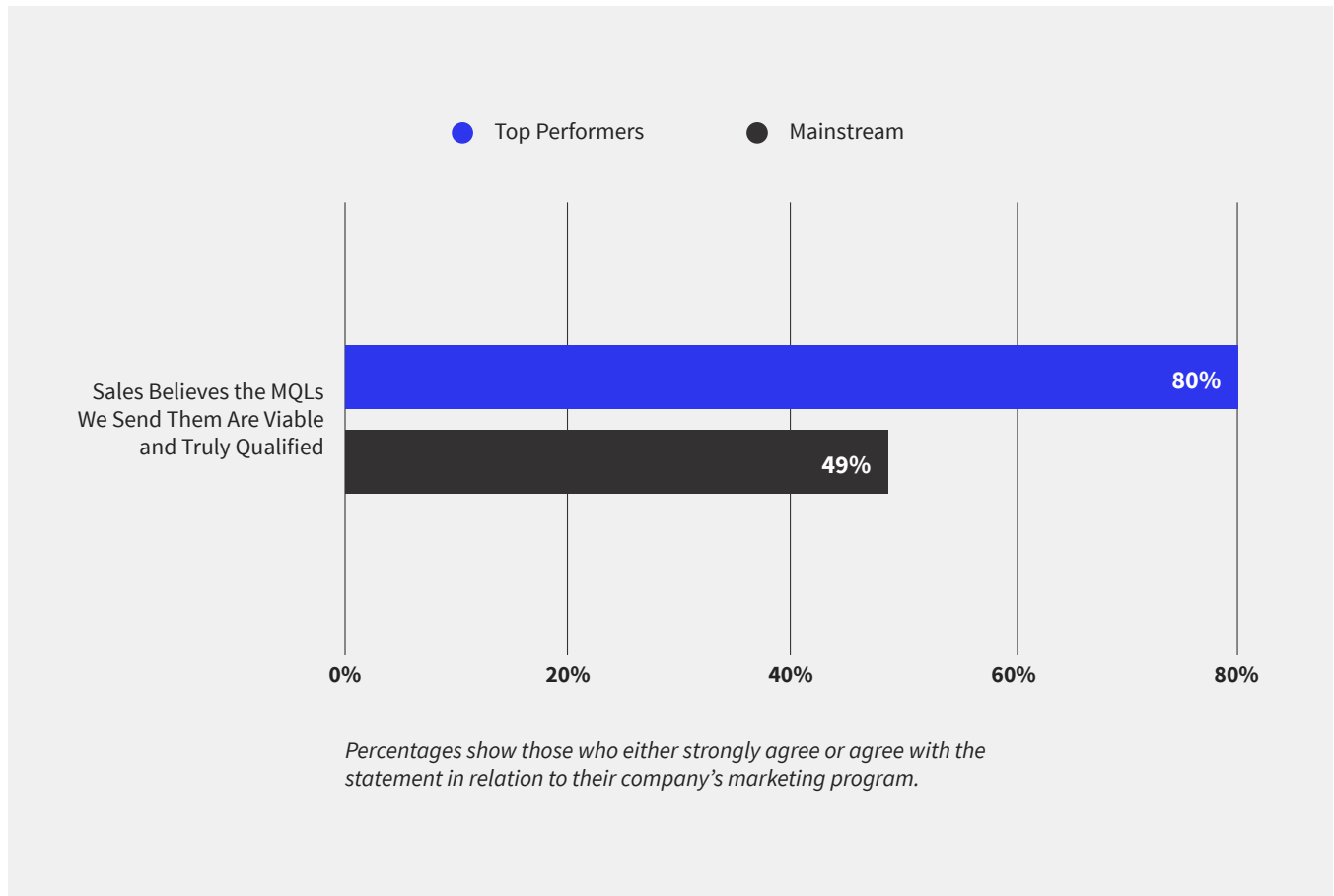


10. <https://www.on24.com/resources/assets/content-preferences-survey-report-2019/>

THEY MAKE SURE LEADS FOR SALES ARE VIABLE

When under pressure to generate leads, it can be tempting to pursue tactics that sacrifice quality for quantity. But low-quality leads don't often turn into opportunities, and can only weaken marketing's position within the organization.

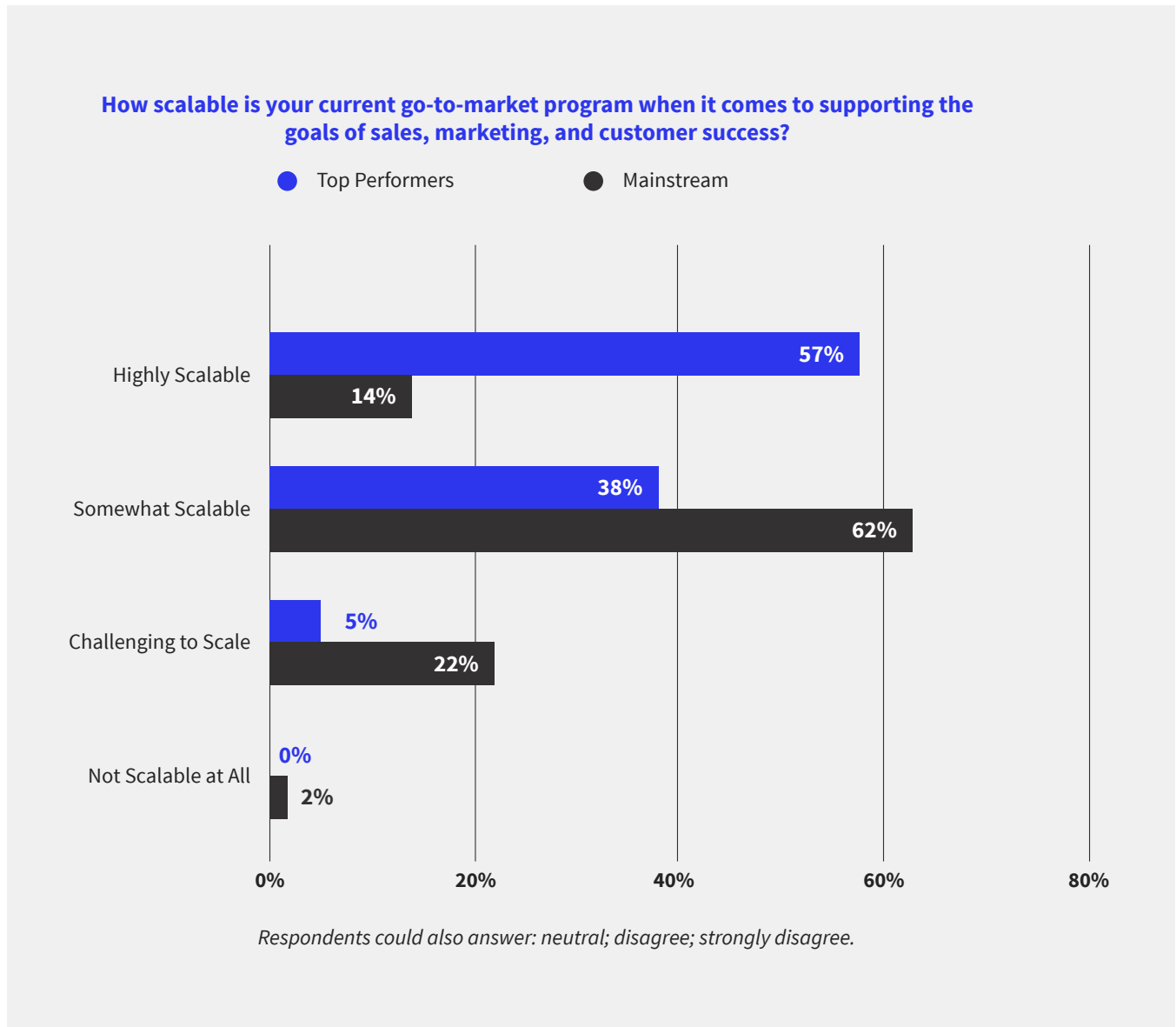
Top performers are much more likely to report that "sales believes the MQLs we send them are viable and truly qualified." Four out of five (80%) of this group agree that this is the case for their marketing program, compared to just under half (49%) of the mainstream.



THEIR ENTIRE GO-TO-MARKET PROGRAM IS SCALABLE

One of the key promises of today’s connected B2B marketing technology is that it allows successful efforts to scale to an entire addressable market. However, making sure that the systems, processes and data are all configured to do this is easier said than done.

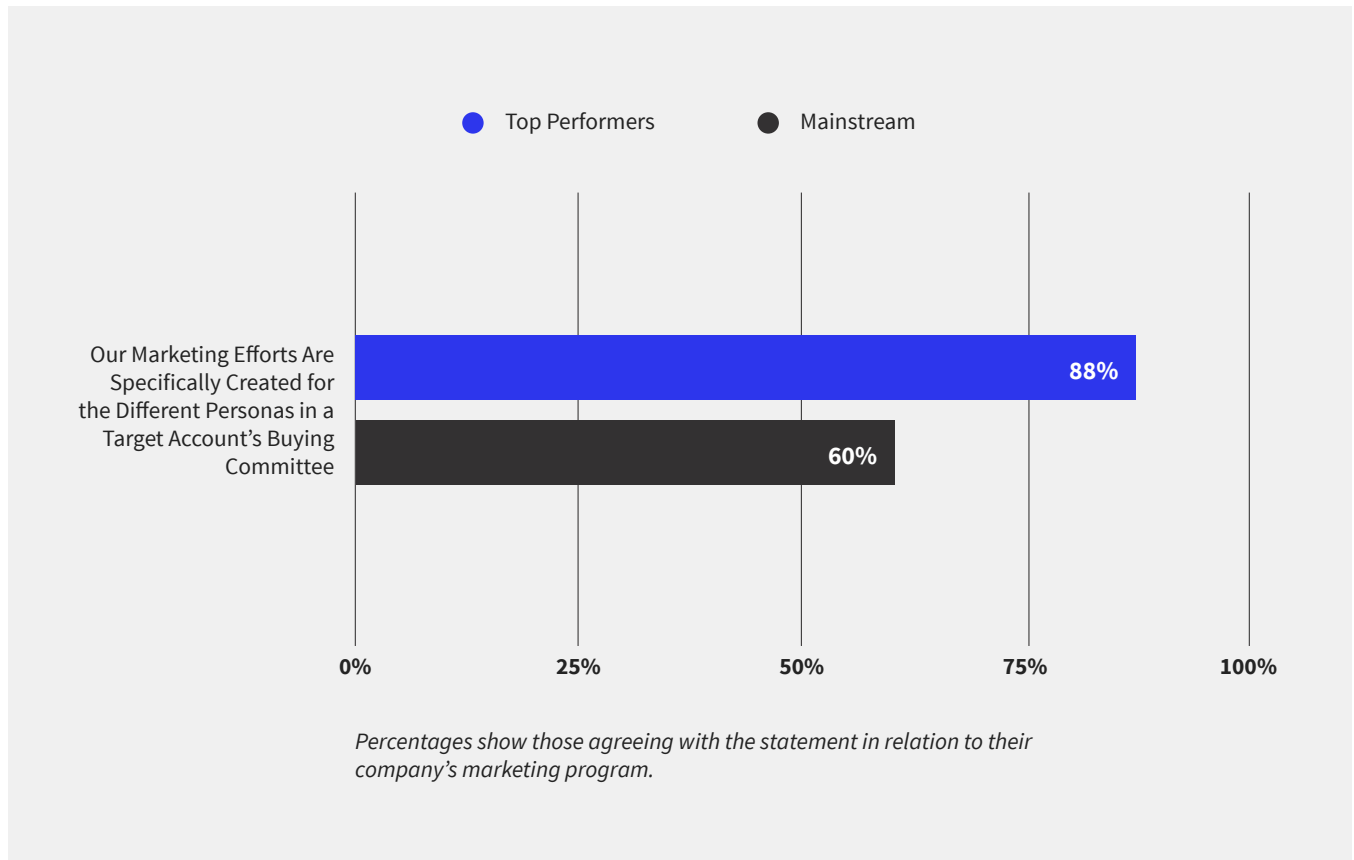
Top performers are more likely to be in such a position. Close to three in five (57%) claim their current go-to-market program is “highly scalable” in supporting the goals of sales, marketing and customer success — a sentiment shared by fewer than one in six (14%) of mainstream respondents.



THEY NARROW DOWN ON THE BUYER

Finally, while marketing content needs to attract as wide an audience as possible, only those accounts that become customers will actually impact the bottom line. Therefore, ensuring your marketing material resonates with those making the buying decisions is critical, particularly in complex sales.

Once again, top performers stand apart, with 88% agreeing that their “marketing efforts are specifically created for the different personas in a target account’s buying committee.”



WHAT'S GETTING IN THE WAY FOR THE REST

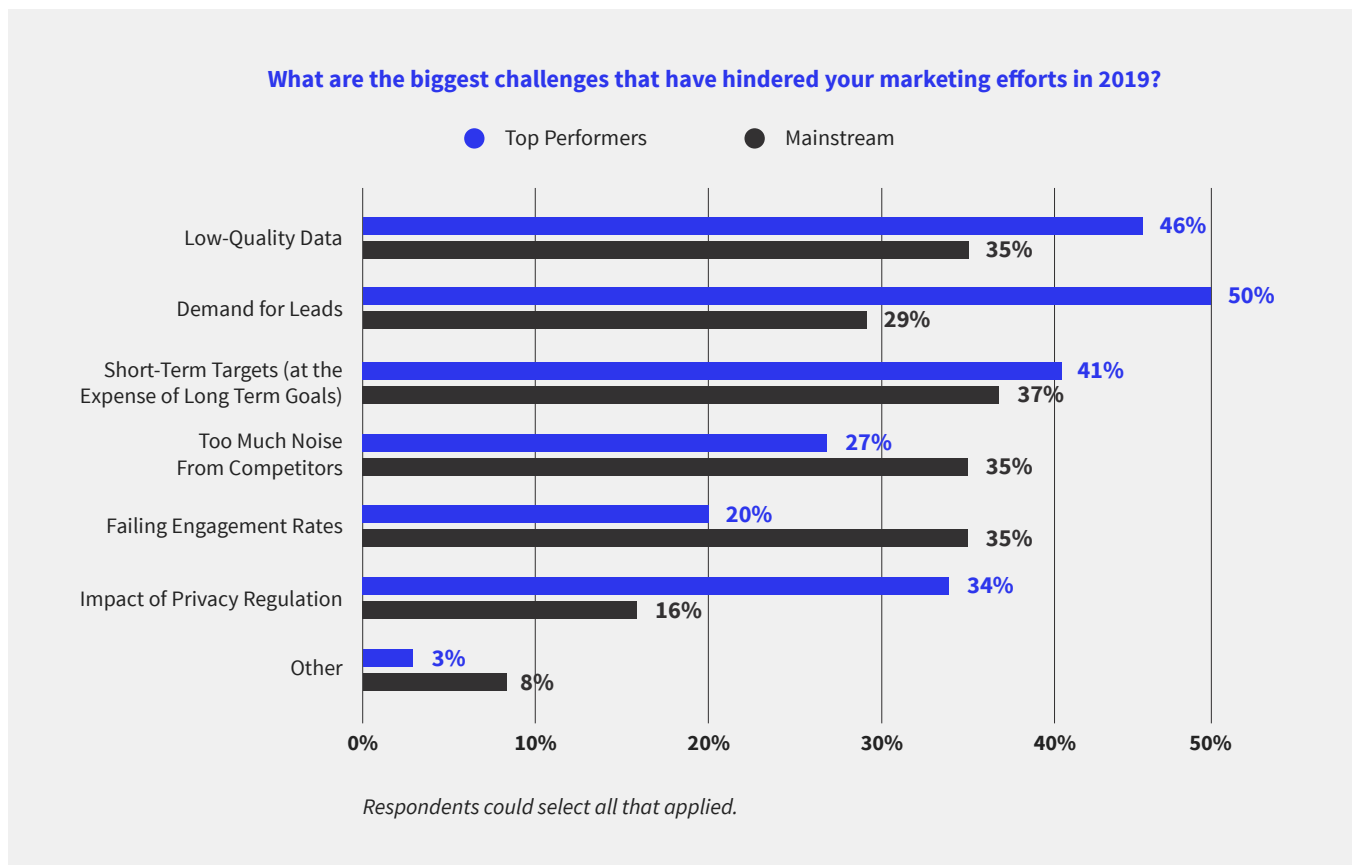
So far, this report has highlighted the behaviors that those achieving success are more likely to exhibit. However, best practice isn't just about doing what is right — it is also about addressing challenges head-on and dismantling barriers to success. So what are the issues that mainstream marketers are more frequently struggling with?

NOISE, FALLING ENGAGEMENT AND OTHER CHALLENGES

The challenges mainstream marketers frequently encounter are twofold: engagement rates (35%) and too much noise from competitors (35%).

While mainstream marketers can't reduce the spam and volume others produce, they can give themselves an honest assessment of their own efforts and explore what they can do to make their marketing an excellent experience worth engaging with.

One other particular point of interest is that, in addition to issues of data and demand for leads, top performers are more concerned with the impact of privacy regulation. This may highlight a key difference, in that top performers are considering how they can maintain the consent of their audiences as they connect with them.

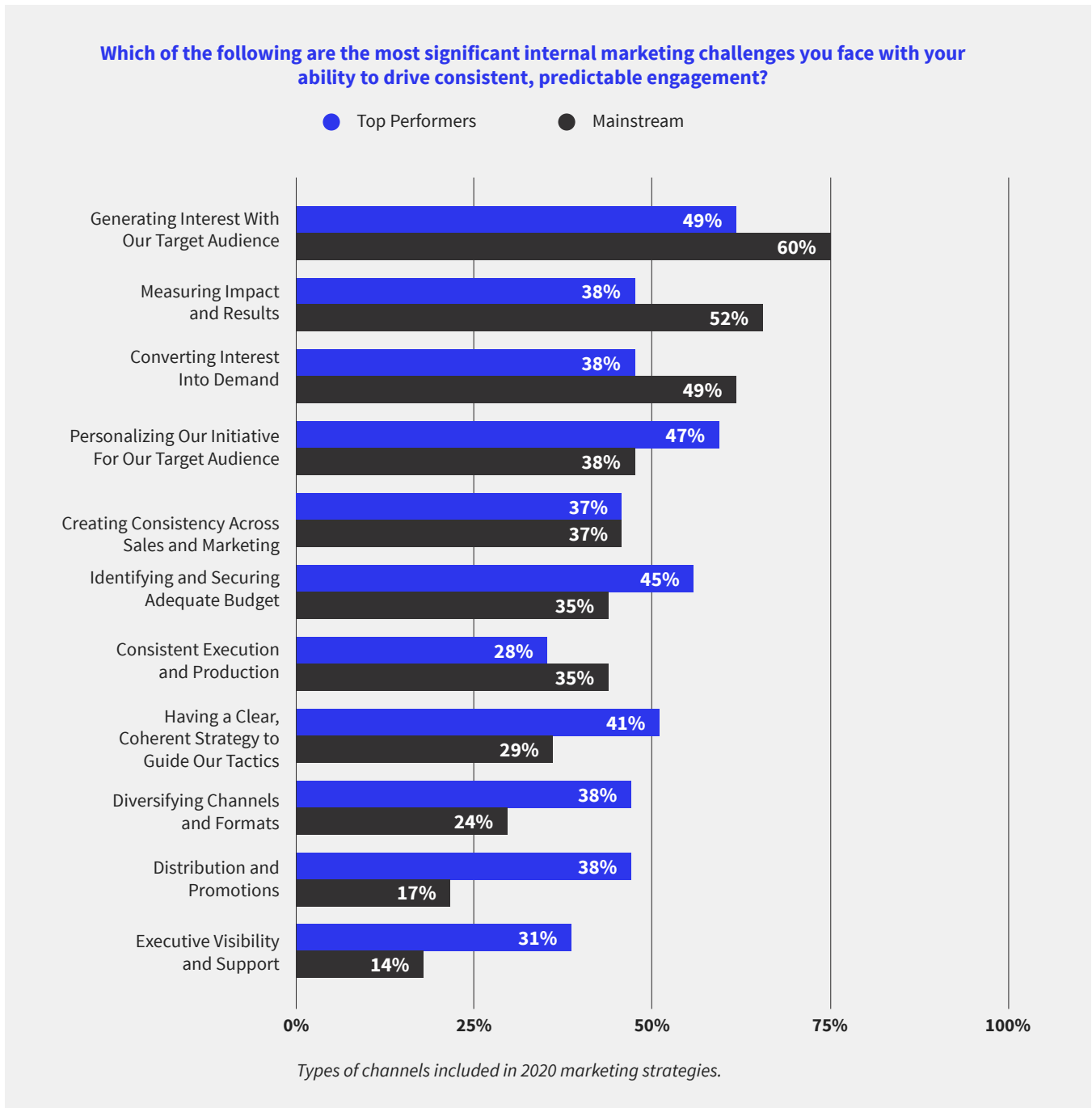


BARRIERS TO PREDICTABLE ENGAGEMENT

The challenge of falling engagement is also visible in the common barriers that mainstream marketers face — although a sizable percentage of top performers are also experiencing the same issue.

The top barrier, accounting for some 60% of the mainstream sample, is in “generating interest with our target audience.” Similarly, close to half (49%) say they struggle in “converting interest into demand.” This further highlights the importance of delivering an engaging customer experience.

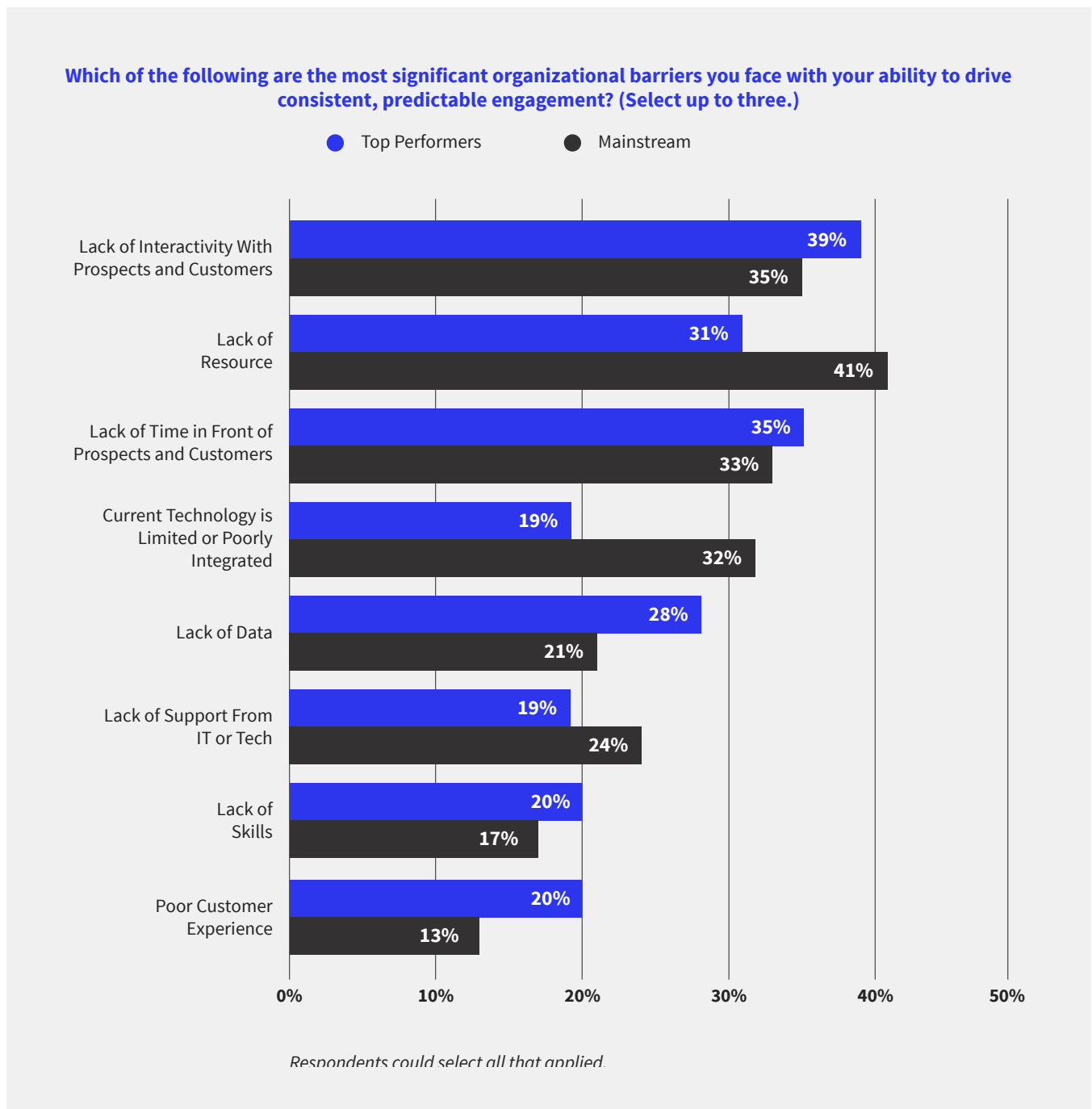
Additionally, measuring impact and results is also a sizable challenge for just over half (52%) of the mainstream.



To narrow the options down, respondents were also asked to list their top three most significant barriers for marketing as a whole.

Although the most frequently cited barrier of mainstream marketers (41%) is lack of resources — a challenge also listed by 31% of top performers — a key barrier unique to them is that their current technology is limited or poorly integrated (32%). They are also more likely to cite a lack of support from IT or tech.

This shows that even with the vast number of solutions on the market, the potential that technology offers is yet to be delivered for many.

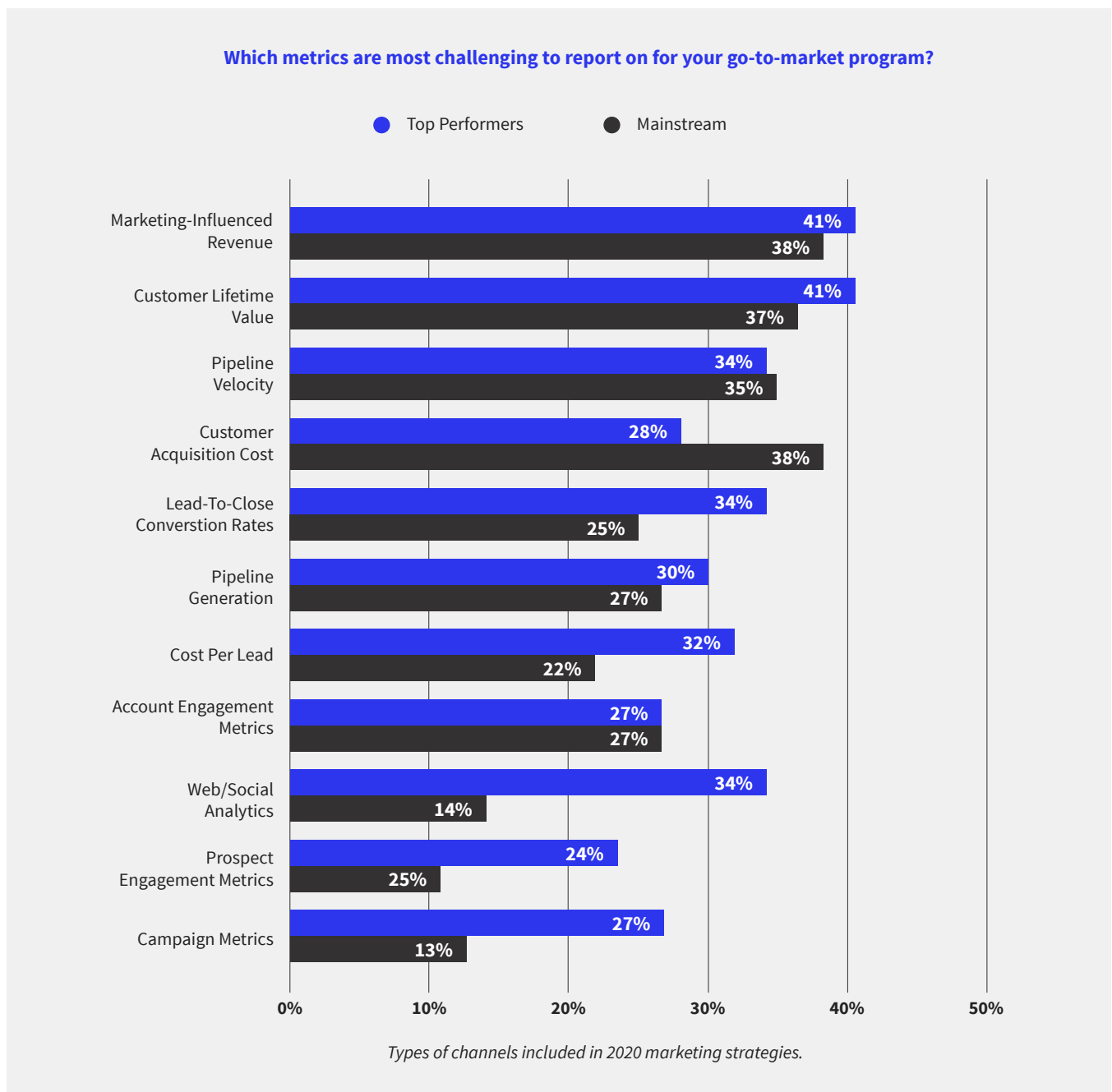


MEASURING PERFORMANCE

Given mainstream marketers are more likely to find measurement a challenge, one might assume that they would also cite a wider variety of metrics as being challenging to report on.

However, this isn't the case. Of the 11 metrics investigated, a high share of mainstream respondents say only three are the most challenging.

In terms of a possible explanation, this could be down to fewer metrics being used. But it may also be the case that mainstream marketers have not fully recognized and tackled the complexities of measurement — a situation likely aggravated by the barriers of their current technology.



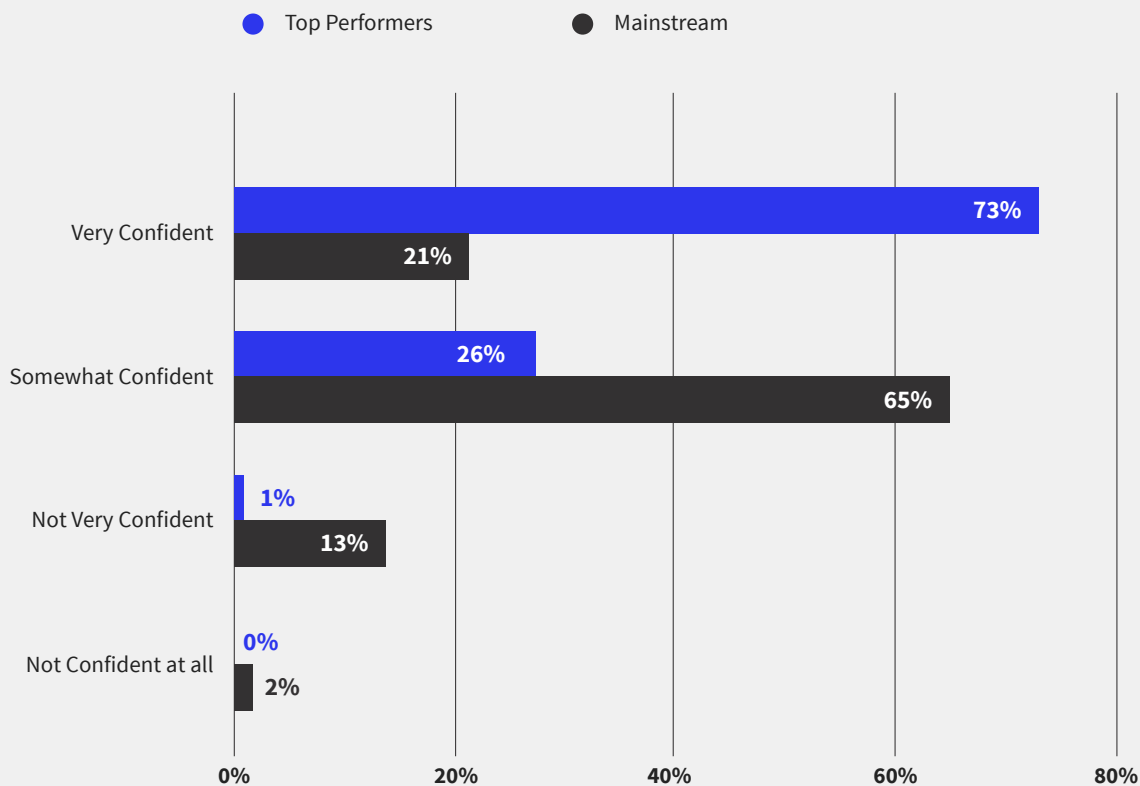
THE PATH FORWARD

SUCCESS IN THE NEXT YEAR

Looking at the year ahead, the marketers that have achieved the greatest levels of success are much more confident in repeating their performance. Close to three-quarters (73%) are “very confident” that they will hit or exceed their marketing objectives.

But aside from adopting best practices, tackling challenges and removing barriers, is there something more fundamental that needs to change among mainstream marketers, the majority of which are at least “somewhat confident”?

Thinking about 2020, please rate your confidence in hitting and/or exceeding your marketing objectives.



Respondents could also answer: neutral; disagree; strongly disagree.

WHY MARKETING NEEDS A MINDSET SHIFT

This final chart suggests that less-successful marketers may be in need of a wakeup call.

Even though they are more likely to complain about noise and falling engagement rates, they are less likely to agree about the changing nature of marketing — namely that outbound tactics and pure funnel-based approaches are becoming ineffective, a position held by the majority of top performers.

Mainstream marketers also appear to be significantly less aware that increasing regulation

will necessitate a change in how marketing currently operates.

But marketers who failed to achieve as much last year cannot bury their heads in the sand. As agreed by more of the top performers, CMOs will become more responsible for the customer experience. They also agree that future great marketing will be synonymous with great customer experience.

Our call to action is this: let's change B2B marketing for the better. By moving from the linear, volume-based approaches of yesterday's marketing to one that puts engaging experiences everywhere, we'll win back the interest and attention of the customers that have switched off.

