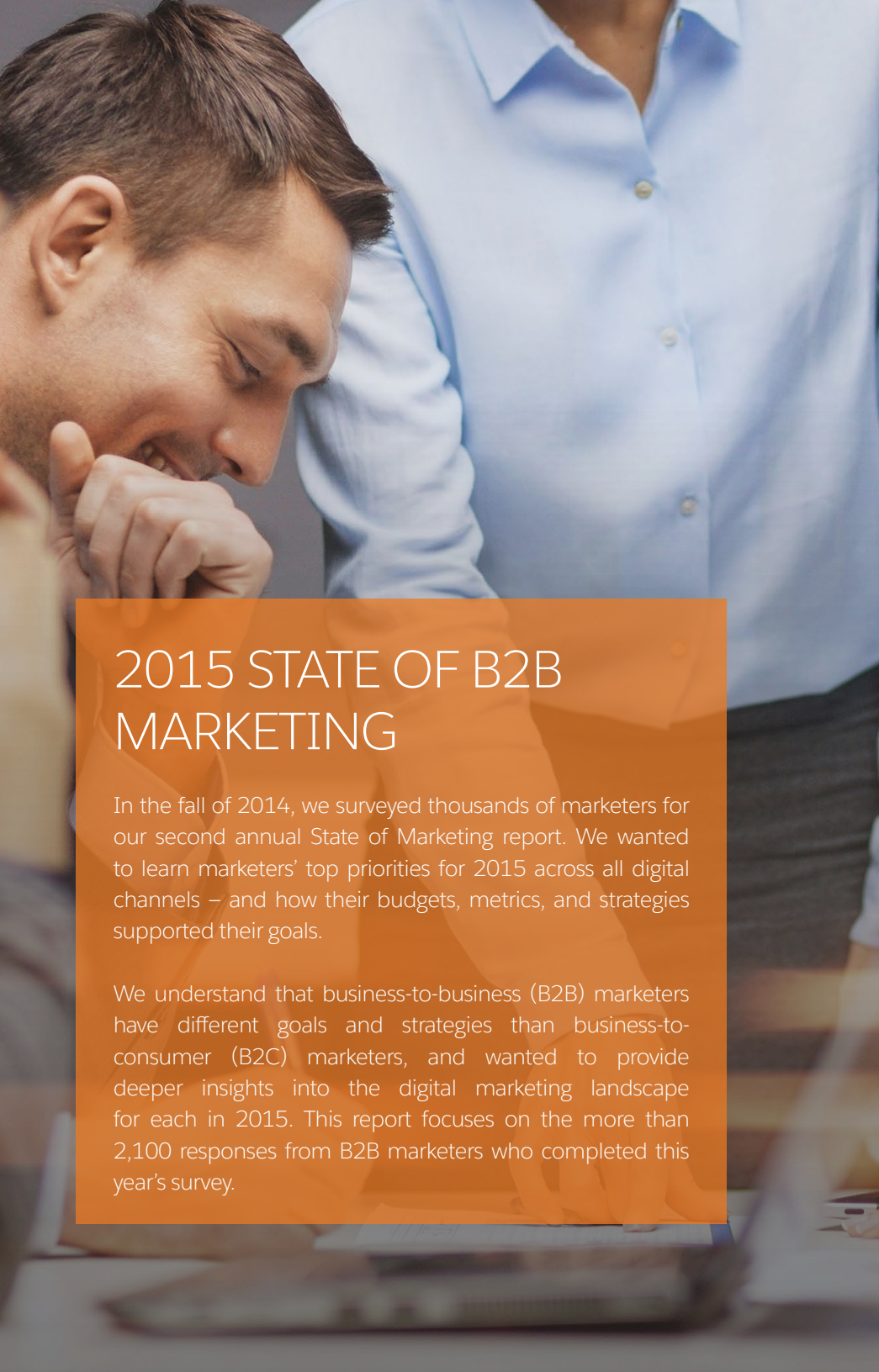# 2015 STATE OF B2B MARKETING

Insights from over 2,100 global marketers

2015 STATE OF B2B MARKETING

In the fall of 2014, we surveyed thousands of marketers for our second annual State of Marketing report. We wanted to learn marketers' top priorities for 2015 across all digital channels – and how their budgets, metrics, and strategies supported their goals.

We understand that business-to-business (B2B) marketers have different goals and strategies than business-to-consumer (B2C) marketers, and wanted to provide deeper insights into the digital marketing landscape for each in 2015. This report focuses on the more than 2,100 responses from B2B marketers who completed this year's survey.

Table of Contents

Executive Summary

The 2015 State of Marketing survey asked marketers about their budgets, priorities, channels, strategies, and metrics for 2015. Here's a snapshot of key findings based on cumulative responses from B2B marketers around the world.
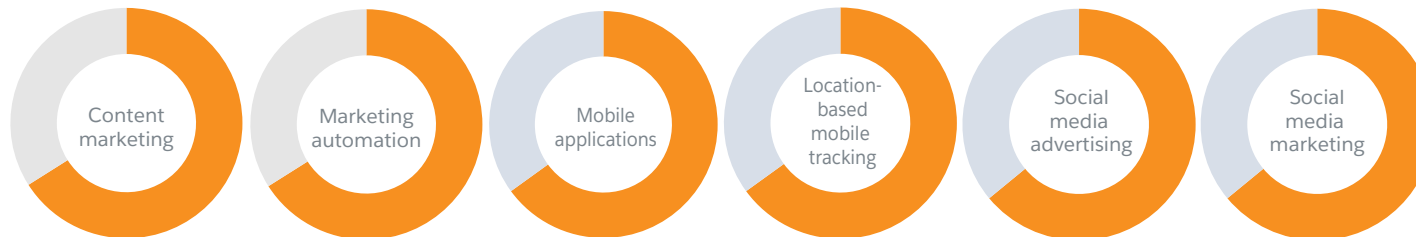
Most Pressing Business Challenges

#1 New business development
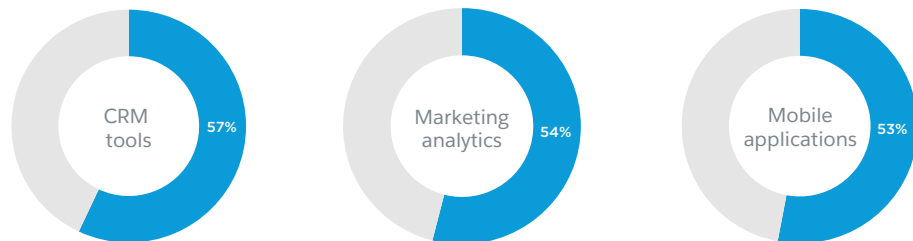
#2 Quality of leads

#3 Demand and lead generation

84% of B2B marketers plan to increase or maintain their spend in 2015.
34% of B2B marketers plan to shift spend from traditional mass advertising to advertising on digital channels.

Top 5 Areas for Increased Spending

Content marketing

Marketing automation

Mobile applications

Location-based mobile tracking

Social media advertising

Social media marketing

Technologies Most Critical to Creating a Cohesive Customer Journey

CRM tools — 57%

Marketing analytics — 54%

Mobile applications — 53%

EMAIL   N=1,259*

73% of marketers believe email marketing is core to their business

48% report click-through rate as the most important email marketing metric

48% always/often use responsive design to build emails

27% don't know what device subscribers are using to read emails

MOBILE   N=868*

64% of marketers believe mobile marketing is core to their business

53% have integrated mobile marketing into the overall marketing strategy

43% have a dedicated mobile marketing team

40% rate mobile website or app traffic as the most important mobile marketing metric

SOCIAL   N=1,288*

56% of marketers believe social media marketing is core to their business

51% have a dedicated social media team

40% rate social media traffic and audience engagement as the most important social marketing metric

18% are not currently managing conversations on social media

Percentages represent data from the base of respondents who indicated that they use this channel.
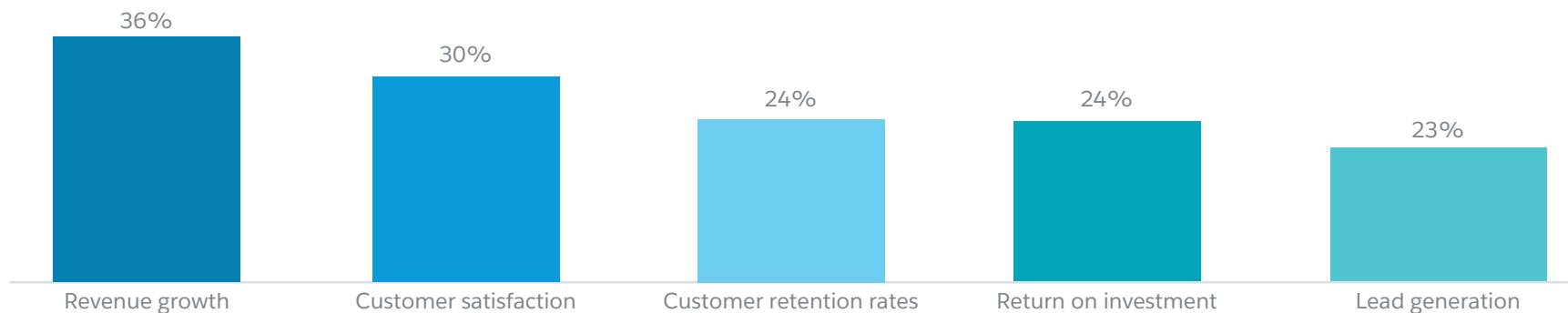
Finding a Focus for 2015

Technologies, channels, and strategies continue to evolve at rapid pace, tasking marketers to evaluate, test, and implement in near real-time. B2B marketers are managing these shifts by implementing technologies and strategies that will target their customers with personalized content wherever they are.

In our research, we see that B2B marketers are placing the customer at the core of their strategy, and aligning their challenges and success metrics. The three most pressing business challenges for B2B marketers – new business development, quality of leads, and demand and lead generation – directly align with the top three metrics they will use to define success in 2015.

The high value that B2B marketers place on customer satisfaction and customer retention rates when evaluating overall marketing success reaffirm that building a cohesive customer journey with 1:1 interactions is imperative. Marketers are investing more heavily in the tools to help them create this experience, such as marketing automation, mobile applications, location-based mobile tracking, and social media marketing.

These findings match with a recent article predicting 2015 B2B marketing trends, which included:

- B2B marketers will adopt a mobile-first approach
- Content marketing will continue to be a cornerstone of B2B marketers overall marketing strategy
- Micro-targeting and personalization will play a large role in improving the customer journey
- More B2B marketers will adopt predictive analytics to help identify, prioritize, and close more deals.[1]

As you'll see on the next page, B2B marketers who are currently using marketing automation and location-based mobile tracking boast some of the highest effectiveness rates of all channels and strategies surveyed. Similarly, industry experts predicted increased adoption in marketing automation and mobile in 2015.[2]

Which marketing channels are most popular among B2B marketers, and how effective are these channels? The chart on the following page provides some answers. It also shows the percentage of marketers planning to use a particular channel in the next 12 months.

Top 5 Digital Marketing Metrics for Success

Metric	Percentage
Revenue growth	36%
Customer satisfaction	30%
Customer retention rates	24%
Return on investment	24%
Lead generation	23%

[1] http://www.business2community.com/b2b-marketing/7-b2b-marketing-trends-watch-2015-01073432
[2] http://blog.visual.ly/five-b2b-marketing-trends-2015/

Finding a Focus for 2015

Popularity and Effectiveness of Digital Marketing Channels and Strategies

Currently Using	Channel/Strategy	Very effective/effective	Somewhat effective	Not very/not at all effective	Piloting/Plan to Use in Next 12 Months
66%	Corporate website	61%	26%	11%	20%
50%	Email marketing	65%	26%	8%	22%
46%	SEO/SEM	62%	28%	8%	29%
45%	Landing pages	63%	27%	8%	27%
43%	Social media engagement	55%	29%	14%	26%
43%	Social media marketing	56%	29%	13%	27%
39%	Display/banner ads	53%	32%	14%	25%
39%	Videos	58%	29%	10%	26%
39%	Blogging	55%	30%	13%	28%
38%	Content marketing	66%	26%	5%	29%
34%	Social media listening	57%	27%	14%	27%
34%	Recommendations via email	63%	26%	9%	26%
34%	Data targeting and segmentation	66%	25%	8%	30%
33%	Social media advertising	60%	27%	11%	29%
29%	Web personalization	66%	25%	7%	33%
29%	Native advertising	54%	31%	10%	27%
26%	Lead nurturing and scoring	68%	21%	8%	31%
26%	Mobile application(s)	61%	25%	10%	28%
26%	Marketing automation	69%	22%	7%	31%
23%	Offer management	66%	24%	7%	26%
23%	Video advertising	60%	27%	7%	27%
23%	Guided selling	64%	25%	6%	29%
21%	Mobile text (SMS) messaging	62%	25%	10%	24%
17%	Mobile push notifications	66%	23%	7%	26%
15%	Location-based mobile tracking	67%	25%	7%	24%
15%	Podcasting	61%	27%	9%	26%

Legend:
- Very effective/effective
- Somewhat effective
- Not very/not at all effective
- Don't know

In comparing the B2B response with overall marketing response to this question, we see a jump in popularity for the email channel. Whereas more B2C marketers are using social channels to connect with their customers, more B2B marketers use traditional digital channels like email.

For recommendations on how to make the most of the digital marketing channels and strategies you choose to implement in 2015, flip to the "Recommendations" section on page 29 of this report.
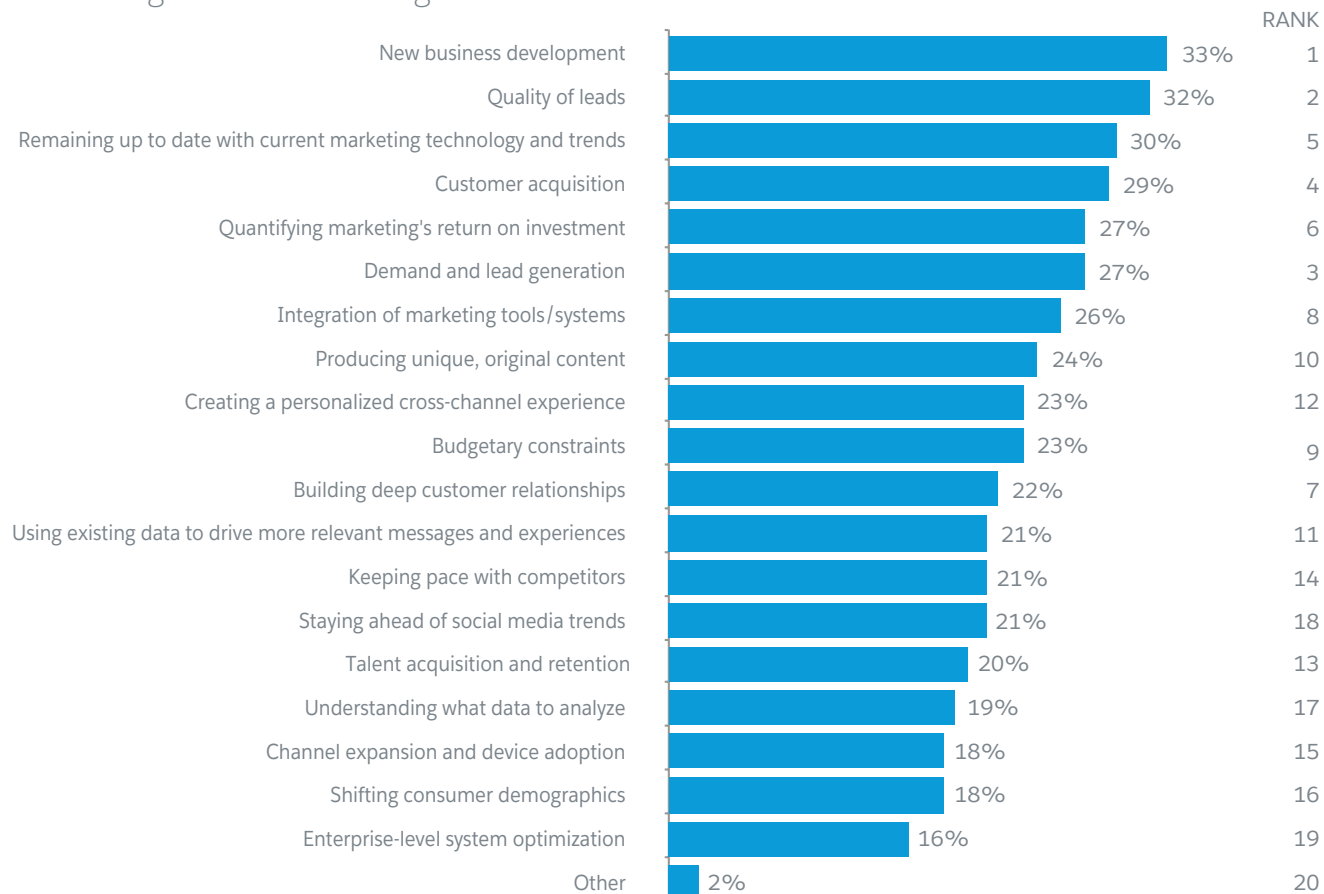
Ranking the Top Obstacles

Attaining customer satisfaction and business success is increasingly challenging as marketers navigate the ever-changing digital marketing landscape. As part of this survey, we asked B2B marketers to share the top challenges that they face while executing their marketing strategy.

Last year, we asked about business challenges primarily in the context of email lifecycle marketing. This year, we expanded our focus to include business challenges that encompassed the entire customer journey, as shown in the following chart. B2B marketers agree that nurturing the customer journey is crucial to growing a business (see the section "Using Technology to Craft the Customer Journey"). We first asked marketers to select all of their most pressing business challenges from the list. Of the business challenges they selected, we then asked them to rank their top three business challenges, which are reflected in the rankings on the right side of the chart.

Most Pressing Business Challenges

Challenge	Percent	RANK
New business development	33%	1
Quality of leads	32%	2
Remaining up to date with current marketing technology and trends	30%	5
Customer acquisition	29%	4
Quantifying marketing's return on investment	27%	6
Demand and lead generation	27%	3
Integration of marketing tools / systems	26%	8
Producing unique, original content	24%	10
Creating a personalized cross-channel experience	23%	12
Budgetary constraints	23%	9
Building deep customer relationships	22%	7
Using existing data to drive more relevant messages and experiences	21%	11
Keeping pace with competitors	21%	14
Staying ahead of social media trends	21%	18
Talent acquisition and retention	20%	13
Understanding what data to analyze	19%	17
Channel expansion and device adoption	18%	15
Shifting consumer demographics	18%	16
Enterprise-level system optimization	16%	19
Other	2%	20

Ranking the Top Obstacles

As mentioned, B2B marketers rank new business development, quality of leads, and demand and lead generation as their most pressing business challenges showing a distinct focus on filling the marketing pipeline.

Marketers also feel pressure to stay up to date with current technology and trends – a finding that aligns with what senior marketing leaders report as their growing responsibility to teach their teams how to perform new functions and develop their marketing technology and analytical skills.[3]

See the recommendations at the end of this report for guidance on how to improve marketing results while traversing these challenges.

The biggest challenges of 2015 are new business development, quality of leads, and demand and lead generation.

Budgets on the Rise

On average, 84% of B2B marketers surveyed plan to increase or maintain their digital marketing spend in 2015. Geographically, Canada and Brazil lead this trend among those surveyed with 95% of marketers planning to increase or maintain their spend. The chart here shows how other countries rank.

Take a look at the percentage of B2B marketers in each country that plan to increase or maintain their overall marketing spend in 2015.

US	Canada	Brazil	Japan	Australia	UK	Germany	France	Nordics
N=1,101	N=97	N=240	N=251	N=100	N=142	N=148	N=148	N=71
79%	95%	95%	80%	88%	89%	91%	89%	92%

With spending on the rise, how exactly are B2B marketers planning to spend their budgets?
Thirty-four percent of B2B marketers are planning to shift budgets from traditional advertising to digital channels in 2015.

The five key areas where B2B marketers plan to focus their budgets in 2015 are detailed below. These percentages represent B2B marketers who plan to increase spend substantially/somewhat on each channel.

Content marketing	Marketing automation	Mobile applications	Location-based mobile tracking	Social media advertising	Social media marketing
66%	66%	65%	65%	64%	64%
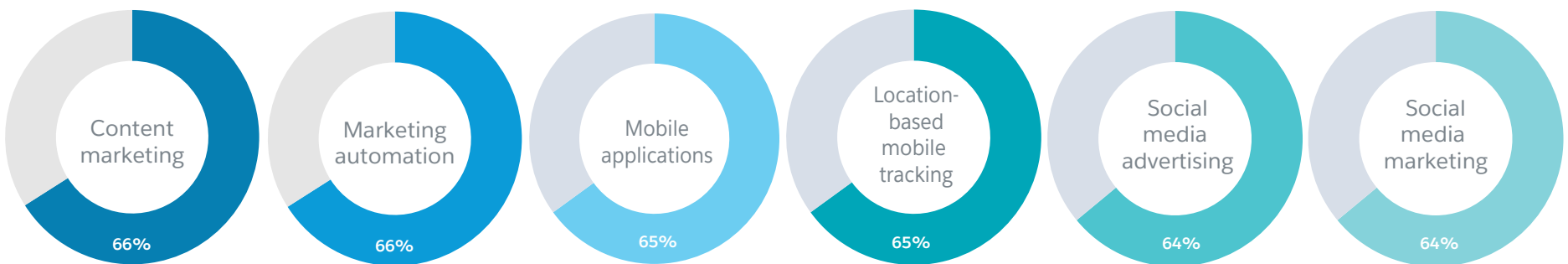
Budgets on the Rise

When we filter the 2015 State of Marketing data by B2B marketers we find that they are still taking a slightly more wide-sweeping approach to their marketing strategy when compared to marketers as a whole. The primary report found that the top five spending areas were all mobile- and social-focused, but with B2B, content marketing garners the highest increase in spend (66%). In another study by MarketingProfs and the Content Marketing Institute, 70% of B2B marketers said they were producing more content now than they did in 2014.[4]

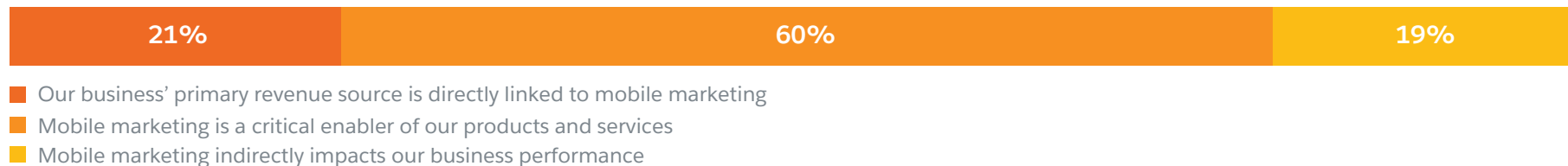Ranked equally at 66%, marketing automation is helping B2B marketers traverse the massive amount of real-time data available, using it to create more efficient and effective 1:1 customer journeys. Increasing spend on mobile (65% mobile apps and 65% location-based mobile tracking) and social (64% social media advertising and 64% social media marketing) may show that B2B companies are trying to get up to speed with their B2C counterparts in terms of building out communication strategies in relatively new channels. Mobile is reported as a critical enabler of B2B products and services by 60% of B2B marketers using the channel; for social, that percentage dips only slightly to 55%.

> 55% of B2B marketers see social media marketing as a critical enabler of products and services and 60% see mobile marketing as a critical enabler of products and services.

Why is Mobile Marketing Core to Your Business?

21%	60%	19%

- Our business' primary revenue source is directly linked to mobile marketing
- Mobile marketing is a critical enabler of our products and services
- Mobile marketing indirectly impacts our business performance

Why is Social Media Marketing Core to Your Business?

17%	55%	28%

- Our business' primary revenue source is directly linked to social media marketing
- Social media marketing is a critical enabler of our products and services
- Social media marketing indirectly impacts our business performance

[4] http://contentmarketinginstitute.com/2014/10/2015-b2b-content-marketing-research/
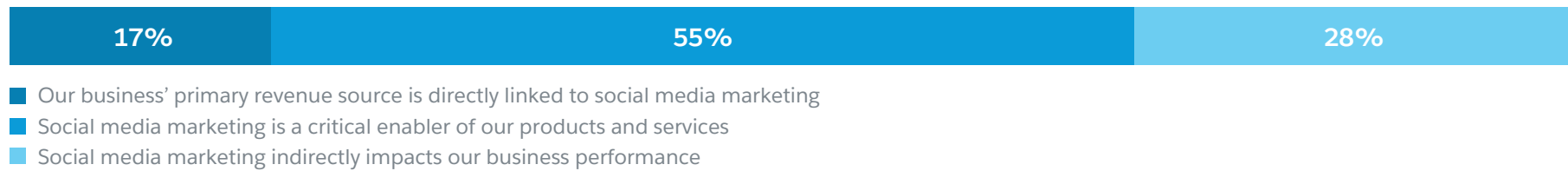
Budgets on the Rise

The chart below provides a detailed look at how B2B marketers plan to increase, maintain, or decrease their budgets across various digital marketing channels and strategies.

Areas of Increase and Decrease in 2015 Budget

Channel	Increase substantially/increase somewhat	Stay about the same	Decrease somewhat/decrease substantially	Don't know
Content marketing	66%	27%	3%	
Marketing automation	66%	29%	3%	
Mobile application(s)	65%	28%	3%	
Location-based mobile tracking	65%	28%	5%	
Social media advertising	64%	28%	3%	
Social media marketing	64%	30%	2%	
Data targeting and segmentation	63%	31%	2%	
Lead nurturing and scoring	63%	30%	4%	
Videos	62%	29%	4%	
Mobile push notifications	61%	32%	4%	
Social media engagement	60%	33%	3%	
Web personalization	60%	33%	3%	
Video advertising	59%	29%	5%	
SEO/SEM	58%	34%	4%	
Email marketing	58%	36%	3%	
Podcasting	57%	33%	5%	
Mobile text messaging (SMS)	57%	33%	6%	
Social media listening	56%	36%	3%	
Display/banner ads	55%	35%	6%	
Guided selling	54%	37%	5%	
Offer management	54%	36%	5%	
Landing pages	54%	39%	3%	
Corporate website	53%	40%	3%	
Blogging	52%	41%	3%	
Recommendations via email	52%	40%	5%	
Native advertising	48%	38%	9%	

Legend:
- Increase substantially/increase somewhat
- Stay about the same
- Decrease somewhat/decrease substantially
- Don't know

Using Technology to Craft the Customer Journey

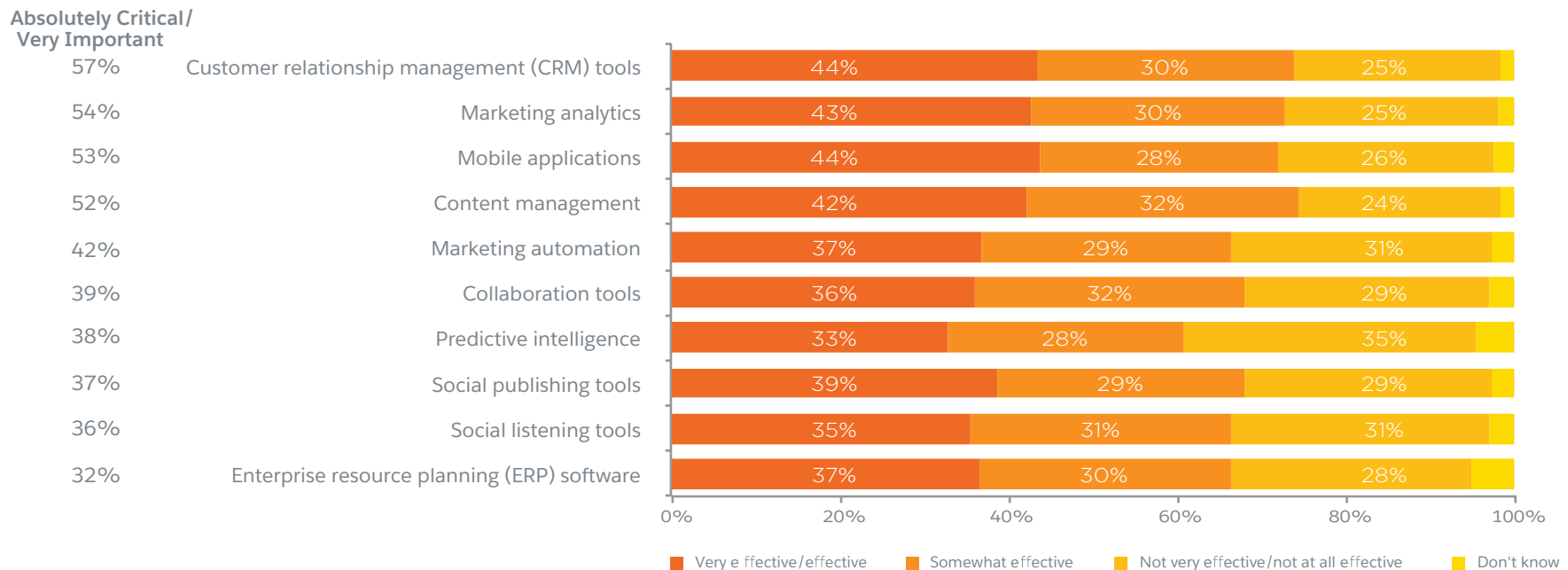For the past 10 years, digital channels and data points have been accumulating at breakneck speed. Every industry has been disrupted. The customer now rules, and speed is the new currency of business. Marketers have scarcely had a moment to make sense of it all with a single big idea that ties everything together. Enter the customer journey. A growing number of marketers today are envisioning their entire marketing strategy under the umbrella of a cohesive customer journey, which we defined in this survey as "all interactions your customers have with your brands, products, and/or services across all touchpoints and channels."

According to recent research, 86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey. Another 11% view the customer journey as moderately important.[5]

Technology is the essential glue that connects various moments along the customer journey to create 1:1 experiences. From analytics that help marketers create personalized interactions, to mobile applications that create personal brand experiences for every interaction, to CRM tools that let marketers track the span of a customer relationship, the customer journey relies completely on its technological elements.

The following chart shows which technologies marketers find most effective at creating a cohesive customer journey. The left column shows the percentage of marketers that rate that technology absolutely critical/very important to the customer journey.

The Effectiveness of Various Technologies at Creating a Cohesive Customer Journey

Absolutely Critical/ Very Important

	Very effective/effective	Somewhat effective	Not very effective/not at all effective	Don't know
57% Customer relationship management (CRM) tools	44%	30%	25%	
54% Marketing analytics	43%	30%	25%	
53% Mobile applications	44%	28%	26%	
52% Content management	42%	32%	24%	
42% Marketing automation	37%	29%	31%	
39% Collaboration tools	36%	32%	29%	
38% Predictive intelligence	33%	28%	35%	
37% Social publishing tools	39%	29%	29%	
36% Social listening tools	35%	31%	31%	
32% Enterprise resource planning (ERP) software	37%	30%	28%	

■ Very effective/effective ■ Somewhat effective ■ Not very effective/not at all effective ■ Don't know

Using Technology to Craft the Customer Journey

B2B marketers rate three technologies as most critical or very important to the customer journey: CRM tools, marketing analytics, and mobile applications. The best-rated technologies varied widely in their functionalities, from content management to social listening tools, demonstrating that customer journey touchpoints can transpire anywhere and require specialized attention to meet customer needs.

Consult the recommendations at the end of this report for specific suggestions on mapping and optimizing your customer journey.

Technologies Rated as Most Critical and Important to the Customer Journey

#1 Customer relationship management (CRM) tools   **#2** Marketing analytics   **#3** Mobile applications

86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey.[6]

[6] The State of Marketing Leadership, Salesforce Marketing Cloud and LinkedIn, November 2014
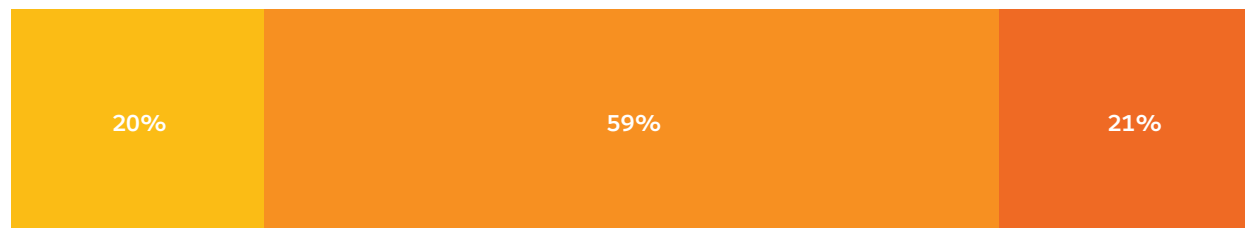
Email Keeps a High Profile

Email is an integral touchpoint along the customer journey for the majority of B2B marketers: 73% of B2B marketers agree that email marketing is core to their business. Fifty-nine percent of B2B marketers rate email as a critical enabler of products and services.

The following charts depict the current email marketing landscape for B2B marketers, from ROI to annual send volume. As you can see on the following page, 70% of marketers report that email marketing is producing or will produce ROI.

Note: All percentages in this section represent data from the base of respondents who indicated that they use email marketing.

Why is Email Core to Your Business?
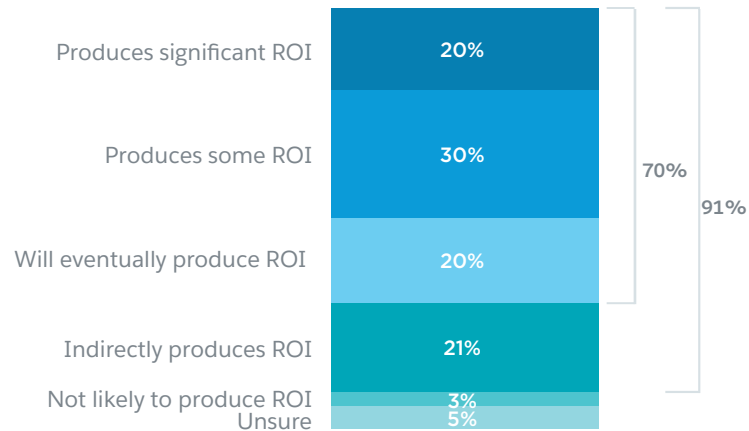
20%	59%	21%

- 🟡 Our business' primary revenue source is directly linked to email operations
- 🟠 Email is a critical enabler of our products and services
- 🟧 Email indirectly impacts our business performance

Email is an integral touchpoint along the customer journey for the majority of B2B marketers: 73% agree that email marketing is core to their business.

Email Keeps a High Profile

To support more ambitious email efforts, email marketing teams are getting bigger, as revealed in the chart "Email Team Size." The following charts depict the current email marketing landscape, from ROI to annual send volume.

Is Email Marketing Producing ROI?

Produces significant ROI	20%
Produces some ROI	30%
Will eventually produce ROI	20%
Indirectly produces ROI	21%
Not likely to produce ROI	3%
Unsure	5%

70%

91%

Email Team Size

- 1 person — 19%
- 2-3 people — 41%
- 4-5 people — 22%
- 6 or more people — 18%

Annual Send Volume

Less than 100,000	32%
100,000-499,999	14%
500,000-less than 1 million	12%
1 million-less than 5 million	9%
5 million-less than 10 million	7%
10 million-less than 25 million	6%
25 million-less than 50 million	2%
50 million-less than 100 million	2%
More than 100 million	5%
Don't know	10%

Email Keeps a High Profile

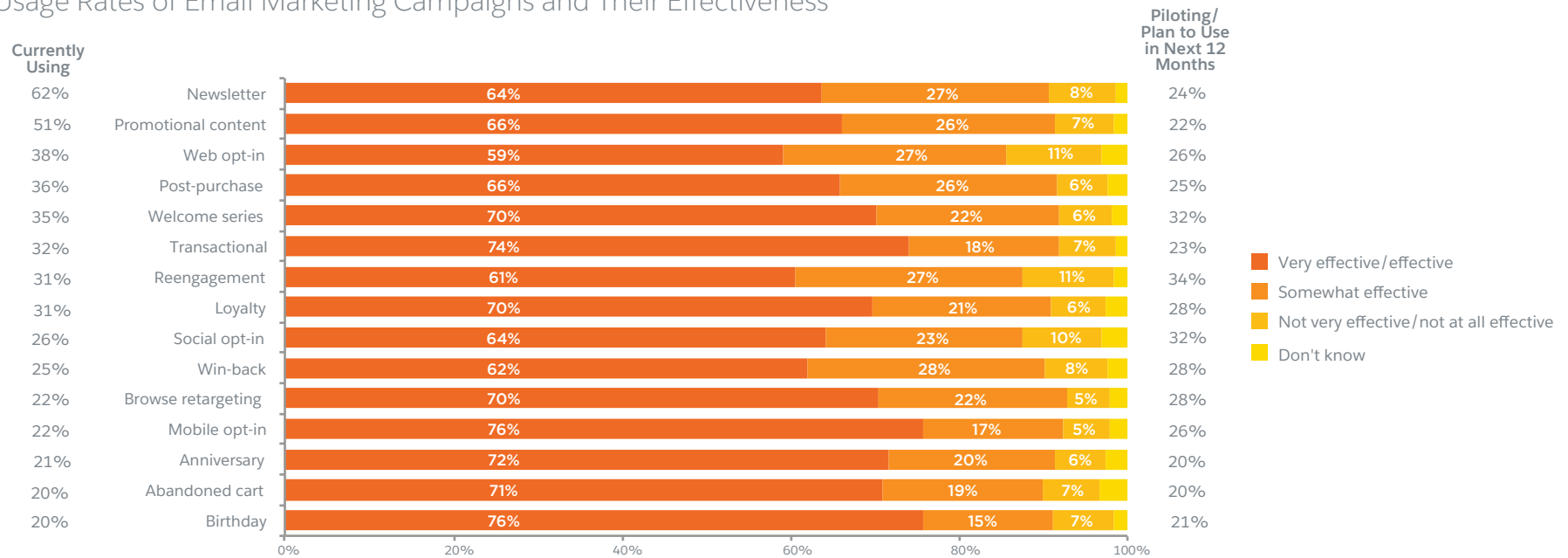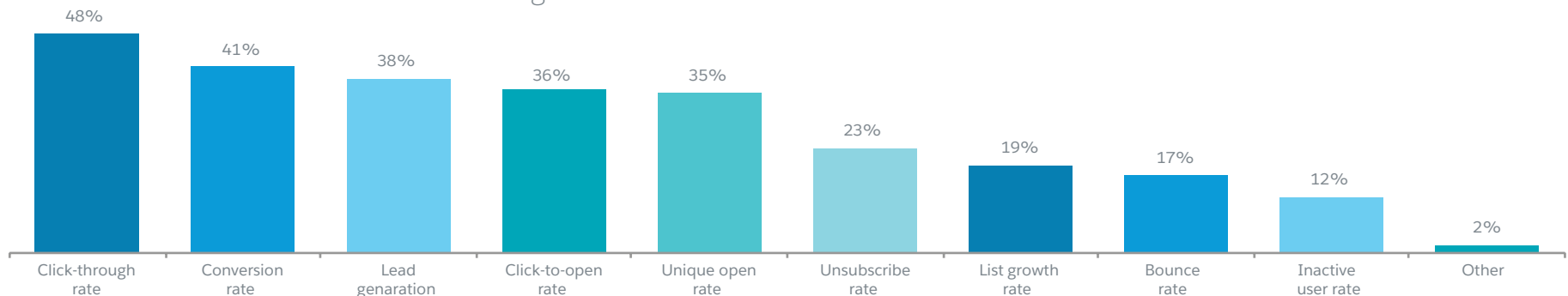We asked B2B marketers to share which email campaigns they use and how effective they find these campaigns. Not surprisingly, newsletters are the most often used campaigns; however, they rank lower for overall effectiveness.

Conversely, mobile opt-in and birthday campaigns are rated the most effective, but are not widely used. Looking for ways to create and measure better email campaigns based on this data? See the recommendations on email at the end of this report.

Usage Rates of Email Marketing Campaigns and Their Effectiveness

Currently Using	Campaign	Very effective/effective	Somewhat effective	Not very effective/not at all effective	Piloting/Plan to Use in Next 12 Months
62%	Newsletter	64%	27%	8%	24%
51%	Promotional content	66%	26%	7%	22%
38%	Web opt-in	59%	27%	11%	26%
36%	Post-purchase	66%	26%	6%	25%
35%	Welcome series	70%	22%	6%	32%
32%	Transactional	74%	18%	7%	23%
31%	Reengagement	61%	27%	11%	34%
31%	Loyalty	70%	21%	6%	28%
26%	Social opt-in	64%	23%	10%	32%
25%	Win-back	62%	28%	8%	28%
22%	Browse retargeting	70%	22%	5%	28%
22%	Mobile opt-in	76%	17%	5%	26%
21%	Anniversary	72%	20%	6%	20%
20%	Abandoned cart	71%	19%	7%	20%
20%	Birthday	76%	15%	7%	21%

Legend:
- Very effective/effective
- Somewhat effective
- Not very effective/not at all effective
- Don't know

Metrics Used to Measure Email Marketing Success

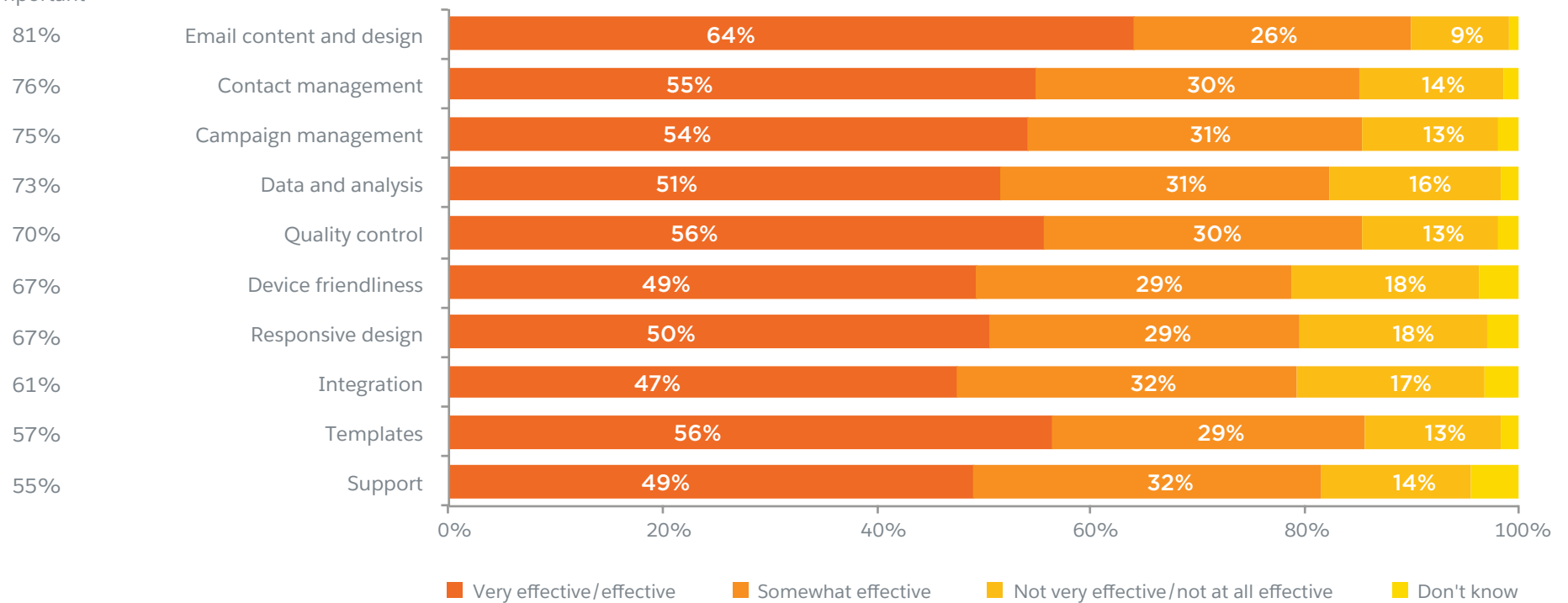| Metric	Value
Click-through rate	48%
Conversion rate	41%
Lead generation	38%
Click-to-open rate	36%
Unique open rate	35%
Unsubscribe rate	23%
List growth rate	19%
Bounce rate	17%
Inactive user rate	12%
Other	2%

Email Keeps a High Profile

Eighty-one percent of B2B marketers view the content and design of their email as the most critical/important feature to creating successful email campaigns, followed closely by contact management (76%).

The Importance and Effectiveness of Email Features

Absolutely Critical/Very Important	Feature	Very effective/effective	Somewhat effective	Not very effective/not at all effective
81%	Email content and design	64%	26%	9%
76%	Contact management	55%	30%	14%
75%	Campaign management	54%	31%	13%
73%	Data and analysis	51%	31%	16%
70%	Quality control	56%	30%	13%
67%	Device friendliness	49%	29%	18%
67%	Responsive design	50%	29%	18%
61%	Integration	47%	32%	17%
57%	Templates	56%	29%	13%
55%	Support	49%	32%	14%

■ Very effective/effective　　■ Somewhat effective　　■ Not very effective/not at all effective　　■ Don't know

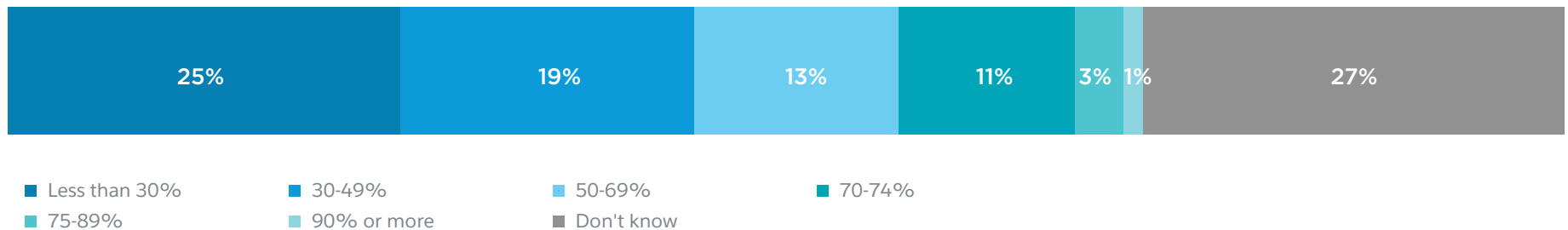# Raising the Stakes on Responsive Design

If you've been keeping an eye on your email analytics, you know that mobile email is likely the rule – not the exception. Here are some stats to consider:

- Nine countries likely surpassed 50% mobile penetration in 2014.[7]
- Responsive design can lead to a 130% increase in email clicks.[8]

Twenty-nine percent of B2B respondents report that at least 50% of their subscriber base reads emails on a mobile device.

While that number may seem lower than what you may expect, consider this: 27% of marketers say they don't know if subscribers are reading their emails on a mobile device. As with any area of business, if you don't know the problem, you can't deliver a solution. By tracking mobile opens, marketers can begin to understand each customer's preferences and habits, and also identify where metrics like click-through rate might be suffering due to a lack of device optimization.

Volume of Subscriber Emails Read on a Mobile Device

25%	19%	13%	11%	3%	1%	27%

- ■ Less than 30%
- ■ 30-49%
- ■ 50-69%
- ■ 70-74%
- ■ 75-89%
- ■ 90% or more
- ■ Don't know

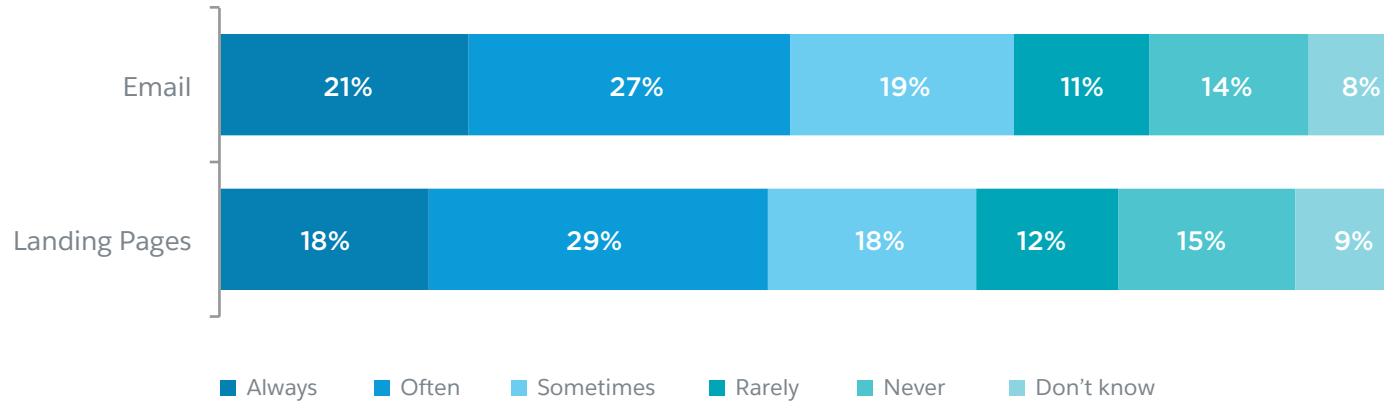[7] Worldwide Smartphone Usage to Grow 25% in 2014, eMarketer, June 2014
[8] Responsive Design A/B Testing Leads to a 130% Increase in Clicks, Litmus, November 2014

Raising the Stakes on Responsive Design

Sixty-seven percent of B2B marketers view responsive design and device friendliness as absolutely critical/very important to building email-marketing campaigns. If you're among the 18% who struggle to effectively design responsive emails, make it a priority in 2015 to not only appreciate the importance of responsive design, but also become highly effective at implementing it.

You can get the ball rolling by providing your designers with educational resources to help them learn. You may also consider hiring a temporary designer who's skilled in this area to show your team the ropes. Read our email recommendations at the end of this report for more ideas on responsive design implementation.

Usage Rates of Mobile Responsive Design

	Always	Often	Sometimes	Rarely	Never	Don't know
Email	21%	27%	19%	11%	14%	8%
Landing Pages	18%	29%	18%	12%	15%	9%

■ Always   ■ Often   ■ Sometimes   ■ Rarely   ■ Never   ■ Don't know

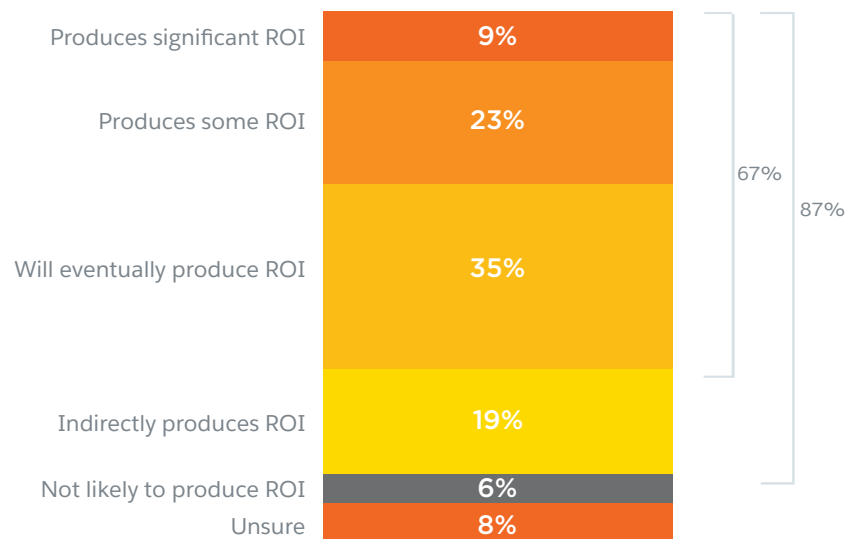# The Year of Mobile Has Arrived – for Real This Time

Last year, a *Forbes* article declared 2014 "the third annual year of mobile."[9] Marketers cry "mobile" like the boy who cried "wolf," but this year, it's looking like the real thing. Thirty-nine percent of B2B marketers surveyed are using some form of mobile marketing, which the survey defined as either SMS, push notifications, mobile apps, or location-based functionality.

B2B marketers are becoming more proactive and shifting their focus to deliver more tailored, 1:1 mobile interactions.
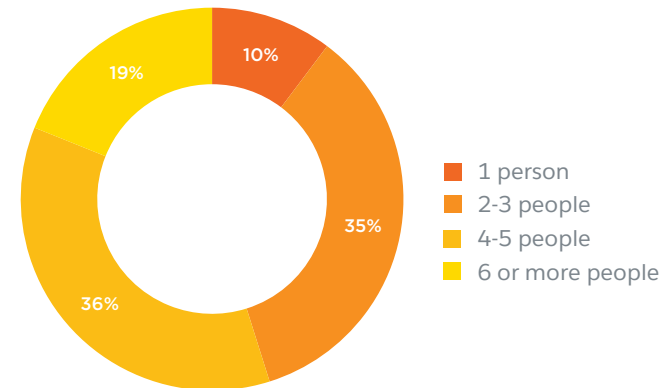
Forty-three percent of B2B marketers have a dedicated team to manage their company's mobile marketing program; 60% say mobile is a critical enabler of products or services. With smartphones quickly becoming the number-one Web access device, every touchpoint along the customer journey must be planned with a mobile-first mindset – and B2B marketers are adopting this mentality in 2015.

Note: All percentages in this section represent data from the base of respondents who indicated that they use mobile marketing.

Mobile Marketing Return on Investment

Produces significant ROI	9%
Produces some ROI	23%
Will eventually produce ROI	35%
Indirectly produces ROI	19%
Not likely to produce ROI	6%
Unsure	8%

67%
87%

Mobile Marketing Team Size

- 10% — 1 person
- 35% — 2-3 people
- 36% — 4-5 people
- 19% — 6 or more people

Mobile Marketing Impact on Business

21%	60%	19%

- Our business' primary revenue source is linked to mobile marketing
- Mobile marketing is a critical enabler of our products and services
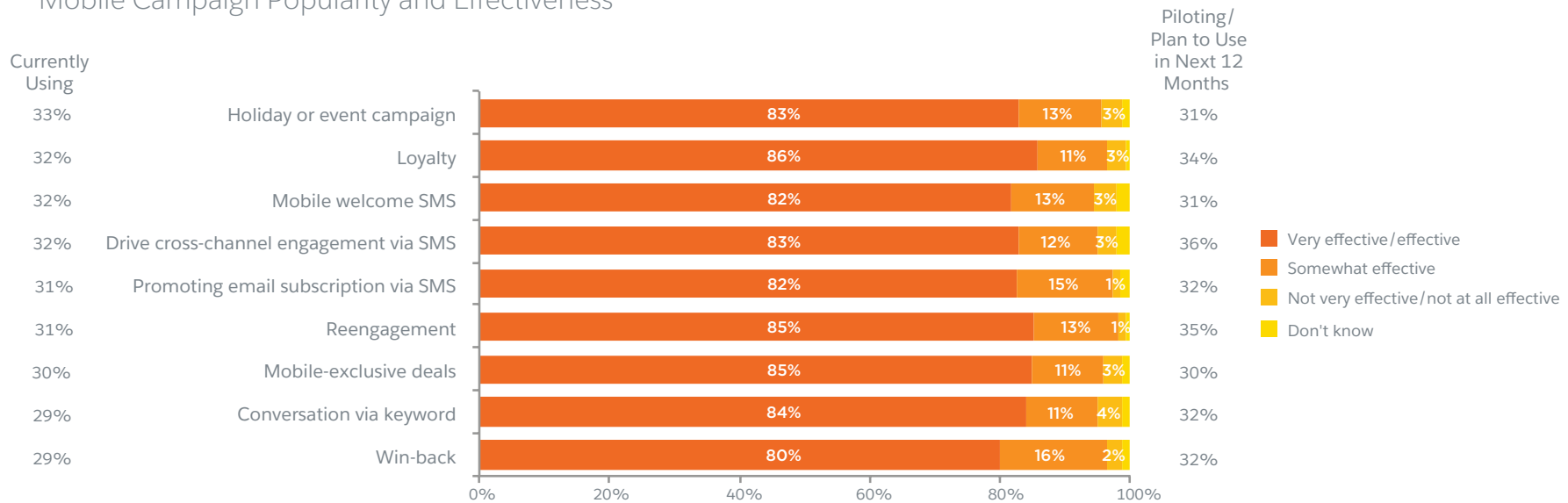- Mobile marketing indirectly impacts our business performance

[9]http://www.forbes.com/sites/kimberlywhitler/2014/02/06/is-2014-finally-the-year-of-mobile/

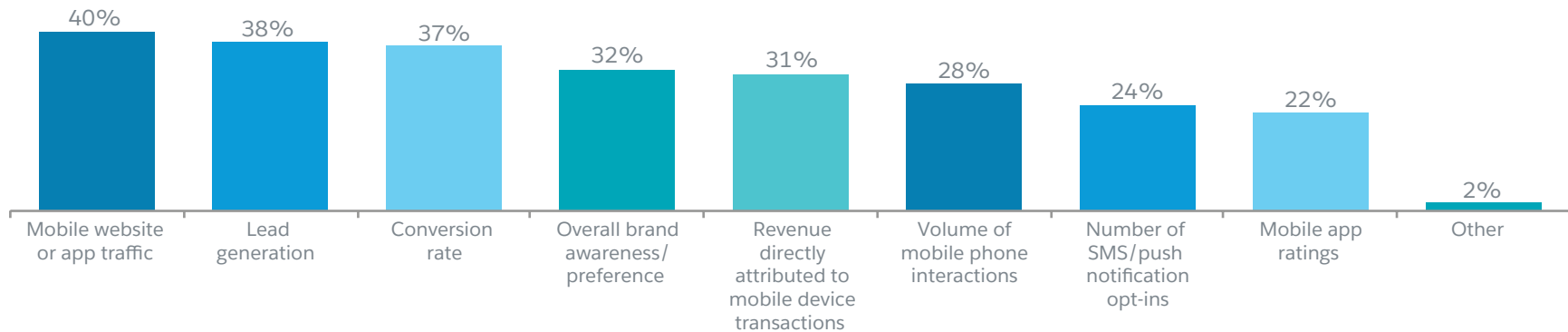# The Year of Mobile Has Arrived – for Real This Time

With this rise in mobile activity, how are B2B marketers actually using the channel? Mobile holiday or event campaigns are most widely used with loyalty campaigns and mobile welcome SMS coming in a close second. Marketers who haven't run a mobile reengagement campaign or tested mobile-exclusive offers should consider experimenting with these in 2015, since they were commonly ranked as highly effective.

Overall, a majority of B2B marketers using mobile rated all campaign types as highly effective, further supporting mobile's crucial position in marketing strategy.
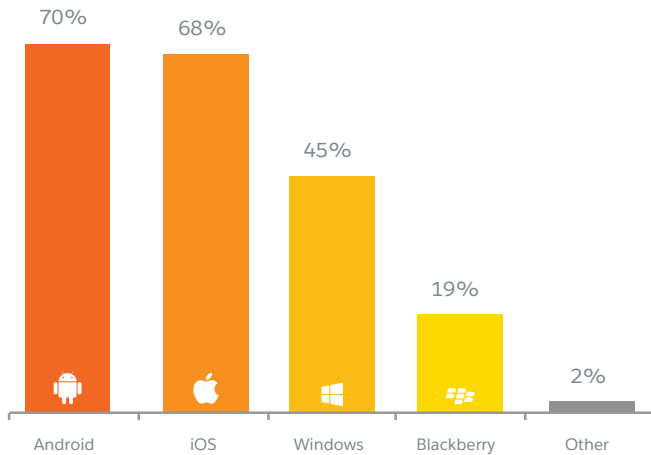
Mobile Campaign Popularity and Effectiveness

Currently Using / Piloting/Plan to Use in Next 12 Months

Currently Using	Campaign	Very effective/effective	Somewhat effective	Not very effective/not at all effective	Piloting/Plan to Use in Next 12 Months
33%	Holiday or event campaign	83%	13%	3%	31%
32%	Loyalty	86%	11%	3%	34%
32%	Mobile welcome SMS	82%	13%	3%	31%
32%	Drive cross-channel engagement via SMS	83%	12%	3%	36%
31%	Promoting email subscription via SMS	82%	15%	1%	32%
31%	Reengagement	85%	13%	1%	35%
30%	Mobile-exclusive deals	85%	11%	3%	30%
29%	Conversation via keyword	84%	11%	4%	32%
29%	Win-back	80%	16%	2%	32%

Legend:
- Very effective/effective
- Somewhat effective
- Not very effective/not at all effective
- Don't know

Metrics for Measuring Mobile Marketing Success

Metric	Value
Mobile website or app traffic	40%
Lead generation	38%
Conversion rate	37%
Overall brand awareness/preference	32%
Revenue directly attributed to mobile device transactions	31%
Volume of mobile phone interactions	28%
Number of SMS/push notification opt-ins	24%
Mobile app ratings	22%
Other	2%

The Year of Mobile Has Arrived – for Real This Time

B2B marketers measure mobile marketing success by mobile website or app traffic. Through our research, we see that 26% of B2B marketers have a mobile application, with support for Android slightly edging out iOS
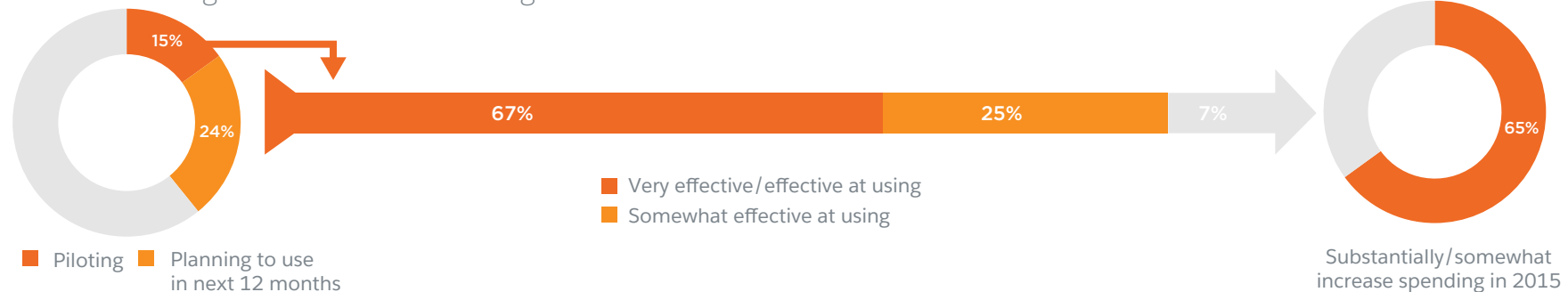
support (70% and 68%, respectively), as shown in the following chart. Another 28% are piloting or planning to create a mobile application in the next 12 months.

Mobile App Support for Operating Systems

70% Android
68% iOS
45% Windows
19% Blackberry
2% Other

Marketers Tracking Mobile App Analytics

9% Don't know
27% No
63% Yes

- Yes
- No
- Don't know

In our *2014 Mobile Behavior Report,*[10] we reported that 76% of smartphone users agree that location sharing provides more meaningful content, and 73% believe location sharing is somewhat or very useful. Among smartphone and tablet owners, 79% have allowed location sharing when using an app and 70% allowed push notifications.
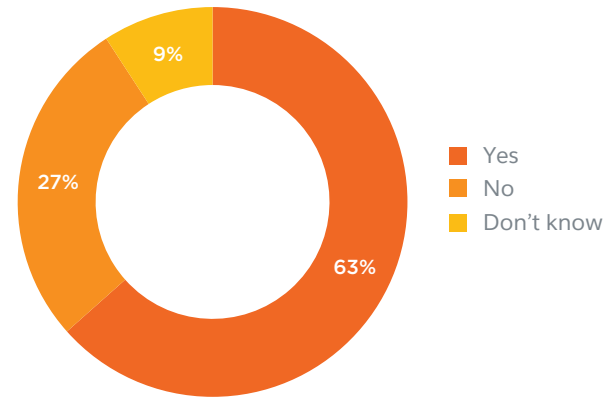
Despite this interest, B2B marketers have just started dipping a toe into the geolocation pool. The good news is that 67% of the small group of B2B marketers (15%) who use location-based tracking rate it as very effective/effective. Sixty-five percent of all B2B marketers plan to substantially/somewhat increase their spend in this category in 2015 as depicted in the chart below.
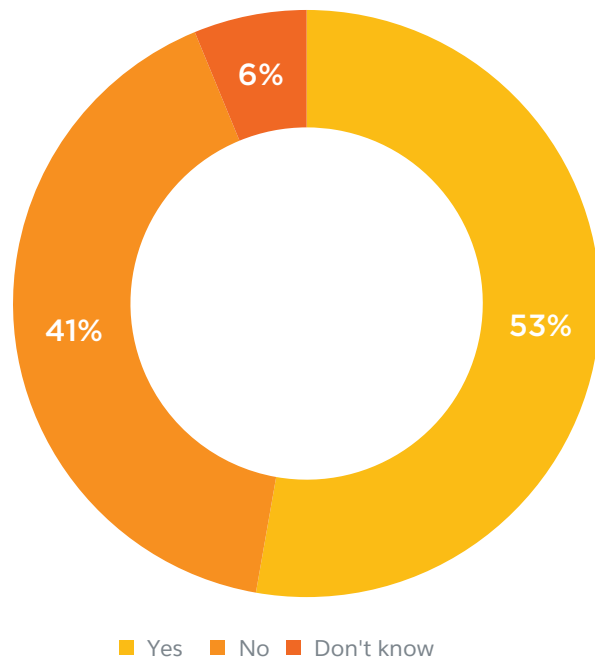
Marketers Using Location-Based Tracking

15% Piloting
24% Planning to use in next 12 months

67% Very effective/effective at using
25% Somewhat effective at using
7%

65% Substantially/somewhat increase spending in 2015

- Very effective/effective at using
- Somewhat effective at using

- Piloting
- Planning to use in next 12 months

Small Screen, Big Impact: Integrating Mobile

A successful customer journey requires integrating mobile into your marketing strategy. Among B2B marketers using mobile channels, 53% have integrated mobile marketing into their overall strategy – meaning they've incorporated either SMS, push notifications, mobile apps, or location-based functionality. Sixty-one percent rate the integration as very effective or effective and 31% rate it as somewhat effective.

B2B companies trail B2C when it comes to integrating mobile marketing into their overall marketing strategy (53% vs. 77%, respectively).

While B2B marketers who have integrated mobile are focused on staying updated with current marketing technologies and new customer acquisition, those who have not are more concerned with demand and lead generation and quality of leads.

Note: Unless otherwise stated, charts in this section exclude respondents who answered "Don't know" to the question "Have you integrated your mobile marketing programs into your overall marketing strategy?".

53% of B2B marketers have integrated mobile marketing into their overall marketing strategy

6%

41%

53%

■ Yes ■ No ■ Don't know

61% of B2B marketers rate their integration as very effective/effective

7%

31%

61%

■ Very effective/effective
■ Somewhat effective
■ Not very effective/not at all effective
■ Don't know
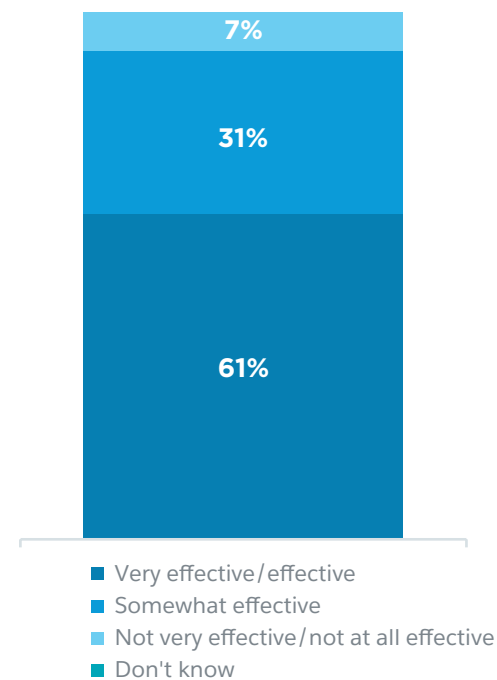
Small Screen, Big Impact: Integrating Mobile

How Mobile Integration Affects Marketers' Challenges

	Total		
	All B2B Respondents	*Integrated*	*Not integrated*
1	New business development	New business development	New business development
2	Enterprise-level system optimization	Remaining up to date with current marketing technologies	Demand and lead generation
3	Demand and lead generation	Customer acquisition (audience and/or list growth)	Quality of leads

A rising tide lifts all ships, and this tide is mobile integration. B2B marketers who have integrated mobile see significant increases in marketing effectiveness, as noted throughout this section. As marketers integrate mobile into their overall approach, the volume of mobile sales dramatically increases, as seen in the chart on the following page.

Percentage of Sales Occurring on Mobile Device by Mobile Integration

Integrated: 10% | 10% | 28% | 26% | 18% | 8%

Not Integrated: 26% | 12% | 10% | 8% | 27% | 18%

Legend: 1% or less | 2-5% | 6-10% | 11-15% | More than 15% | Don't know/not applicable
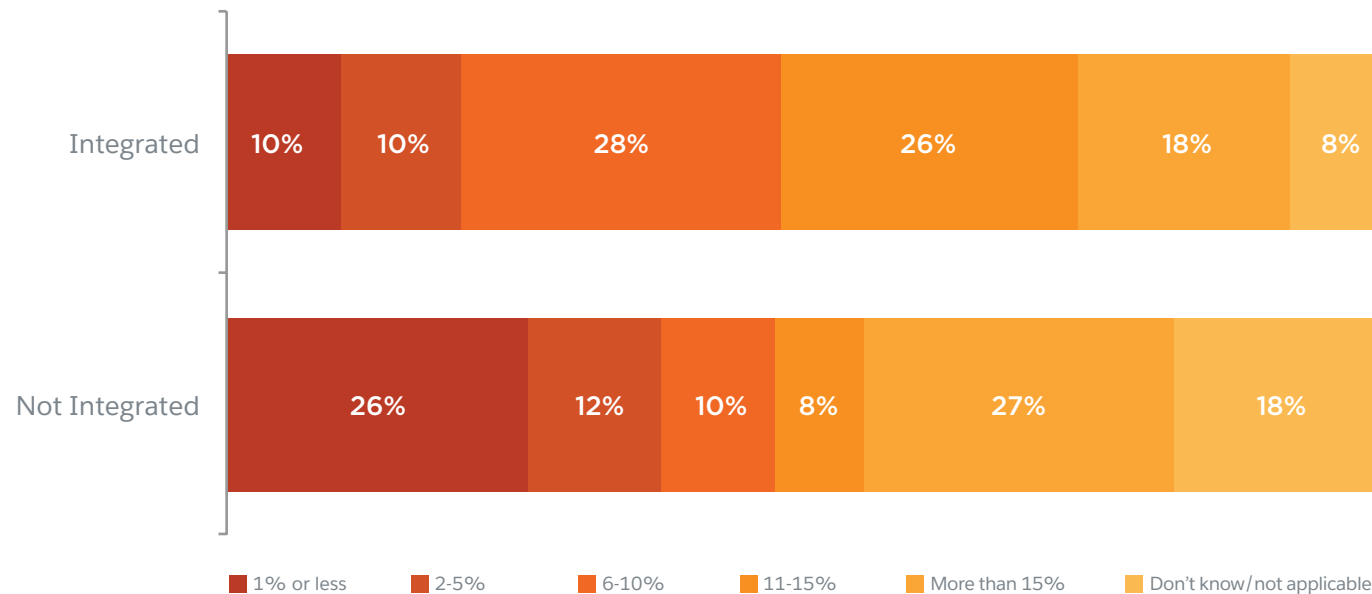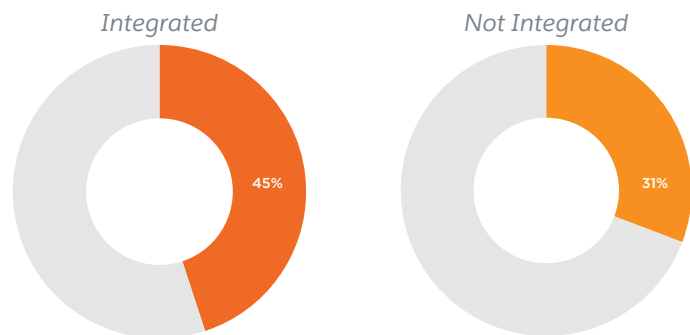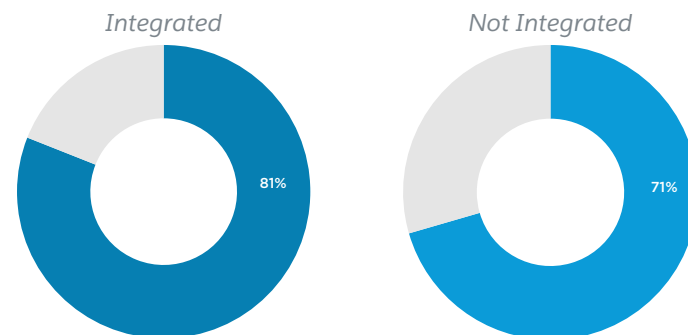
Small Screen, Big Impact: Integrating Mobile

As mobile impacts sales, it also impacts marketing spending. B2B marketers who have integrated mobile are shifting more of their marketing spend from traditional advertising to digital channels like mobile app ads, social ads, and display ads. Additionally, the total spend dramatically increases as they integrate their mobile marketing; this is perhaps a cyclical trend, where increased ROI from mobile integration fuels increased spending, so on and so forth. Among those who have fully integrated mobile, 81% are increasing their total digital spend substantially/somewhat, compared to 71% for those who haven't.

B2B marketers who have integrated mobile rate their ability to effectively implement various technologies – from CRM to social listening tools – much higher than those who have not. This supports the notion that mobile can't be treated as an isolated channel, but rather as a key component of the customer journey and enabler of other channels. We see the same pattern when they rate the effectiveness of individual channels and strategies, as seen in the chart on page 25. In short, when mobile is integrated, all marketing technologies, channels, and strategies become more effective.
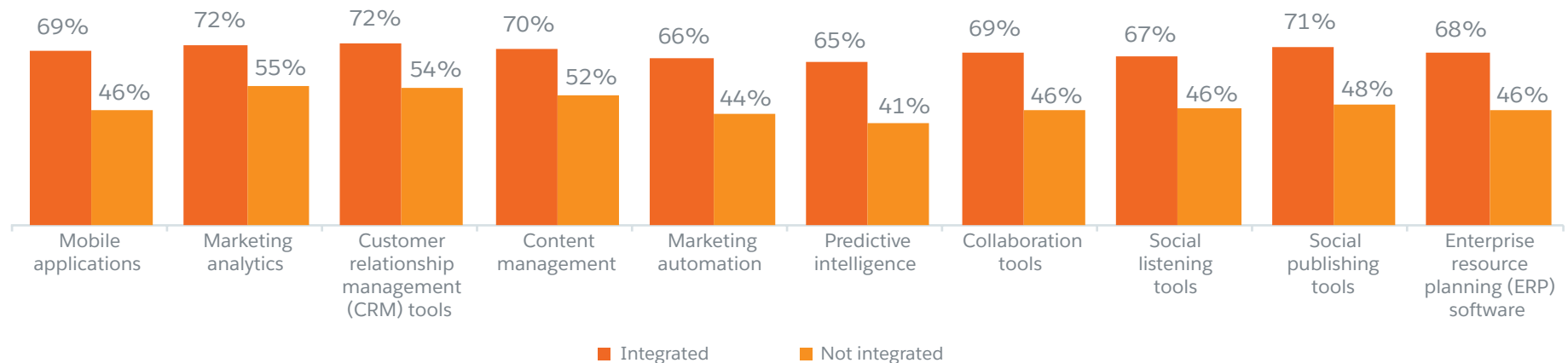
B2B Marketers Shifting from Traditional Advertising to Digital Channels by Mobile Integration

Integrated
45%

Not Integrated
31%

B2B Marketers Increasing Total Digital Spend Substantially/Somewhat by Mobile Integration

Integrated
81%

Not Integrated
71%

B2B Marketers Rating Technologies as Very Effective/Effective by Mobile Integration

Technology	Integrated	Not integrated
Mobile applications	69%	46%
Marketing analytics	72%	55%
Customer relationship management (CRM) tools	72%	54%
Content management	70%	52%
Marketing automation	66%	44%
Predictive intelligence	65%	41%
Collaboration tools	69%	46%
Social listening tools	67%	46%
Social publishing tools	71%	48%
Enterprise resource planning (ERP) software	68%	46%

■ Integrated   ■ Not integrated

Small Screen, Big Impact: Integrating Mobile

Effectiveness of Channels and Strategies by Mobile Integration

Integrated | | Not Integrated

Integrated (Not very effective | Somewhat effective | Very effective)	Channel	Not Integrated (Very effective | Somewhat effective | Not very / Don't know)
5% / 17% / 77%	Corporate website	69% / 20% / 11%
3% / 19% / 78%	Email marketing	64% / 27% / 8%
5% / 17% / 78%	SEO/SEM	64% / 28% / 6%
4% / 18% / 76%	Landing pages	68% / 22% / 9%
9% / 14% / 77%	Social media engagement	62% / 26% / 11%
4% / 14% / 80%	Social media marketing	57% / 27% / 15%
8% / 16% / 74%	Display/banner ads	52% / 33% / 15%
6% / 20% / 72%	Videos	60% / 32% / 8%
4% / 20% / 76%	Blogging	58% / 31% / 10%
5% / 17% / 77%	Content marketing	68% / 27% / 2%
6% / 17% / 76%	Social media listening	61% / 28% / 9%
7% / 20% / 73%	Recommendations via email	69% / 23% / 8%
5% / 14% / 80%	Data targeting and segmentation	67% / 22% / 7%
5% / 15% / 79%	Social media advertising	63% / 26% / 9%
1% / 19% / 80%	Web personalization	66% / 23% / 8%
4% / 22% / 72%	Native advertising	51% / 36% / 9%
6% / 12% / 79%	Lead nurturing and scoring	78% / 13% / 7%
5% / 19% / 75%	Mobile application(s)	44% / 35% / 16%
4% / 18% / 77%	Marketing automation	79% / 16% / 5%
7% / 17% / 75%	Offer management	67% / 27% / 3%
8% / 22% / 68%	Video advertising	64% / 25% / 6%
3% / 18% / 77%	Guided selling	70% / 24% / 3%
8% / 21% / 70%	Mobile text (SMS) messaging	51% / 35% / 11%
4% / 20% / 74%	Mobile push notifications	53% / 29% / 13%
5% / 18% / 75%	Location-based mobile tracking	51% / 36% / 10%
6% / 18% / 75%	Podcasting	65% / 25% / 7%

Legend:
- Very effective/effective
- Somewhat effective
- Not very effective/not at all effective
- Don't know

Marketers Who Have Dedicated Digital Teams by Channel

EMAIL	
Integrated	Not Integrated
N=318	N=293
80%	36%

MOBILE	
Integrated	Not Integrated
N=458	N=356
71%	11%

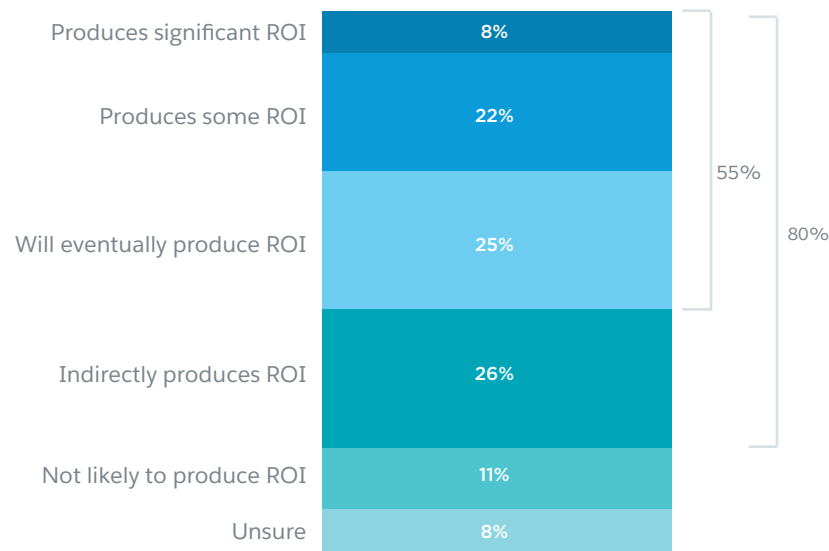| SOCIAL	
Integrated	Not Integrated
N=386	N=294
76%	31%

Social Takes the Spotlight

A study by MarketingProfs and the Content Marketing Institute revealed that B2B marketers use an average of 13 content marketing tactics, with social media sitting at number one. More than half (55%) of B2B marketers agree that social media marketing is a critical enabler of products and services.[11] Fifty-six percent also agree that social media marketing is core to their business.
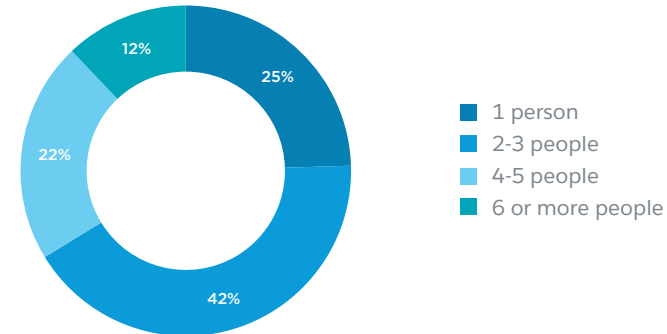
In fact, 64% of B2B marketers are increasing their social media advertising and social media marketing budgets. With bigger social budgets to manage, these marketers are likewise expanding the size of their teams; 51% have a dedicated team to manage their company's social media marketing programs.

Note: All percentages in this section represent data from the base of respondents who indicated that they use social media marketing.
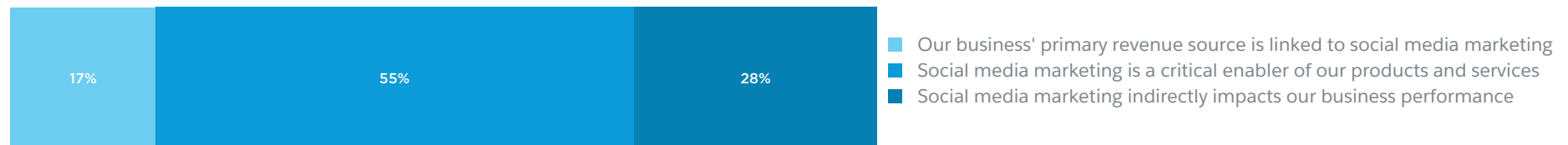
Social Media Marketing Return on Investment

Produces significant ROI	8%
Produces some ROI	22%
Will eventually produce ROI	25%
Indirectly produces ROI	26%
Not likely to produce ROI	11%
Unsure	8%

55%

80%

Social Media Marketing Team Size

25%

42%

22%

12%

- 1 person
- 2-3 people
- 4-5 people
- 6 or more people

Social Media Marketing Impact on Business

17%	55%	28%

- Our business' primary revenue source is linked to social media marketing
- Social media marketing is a critical enabler of our products and services
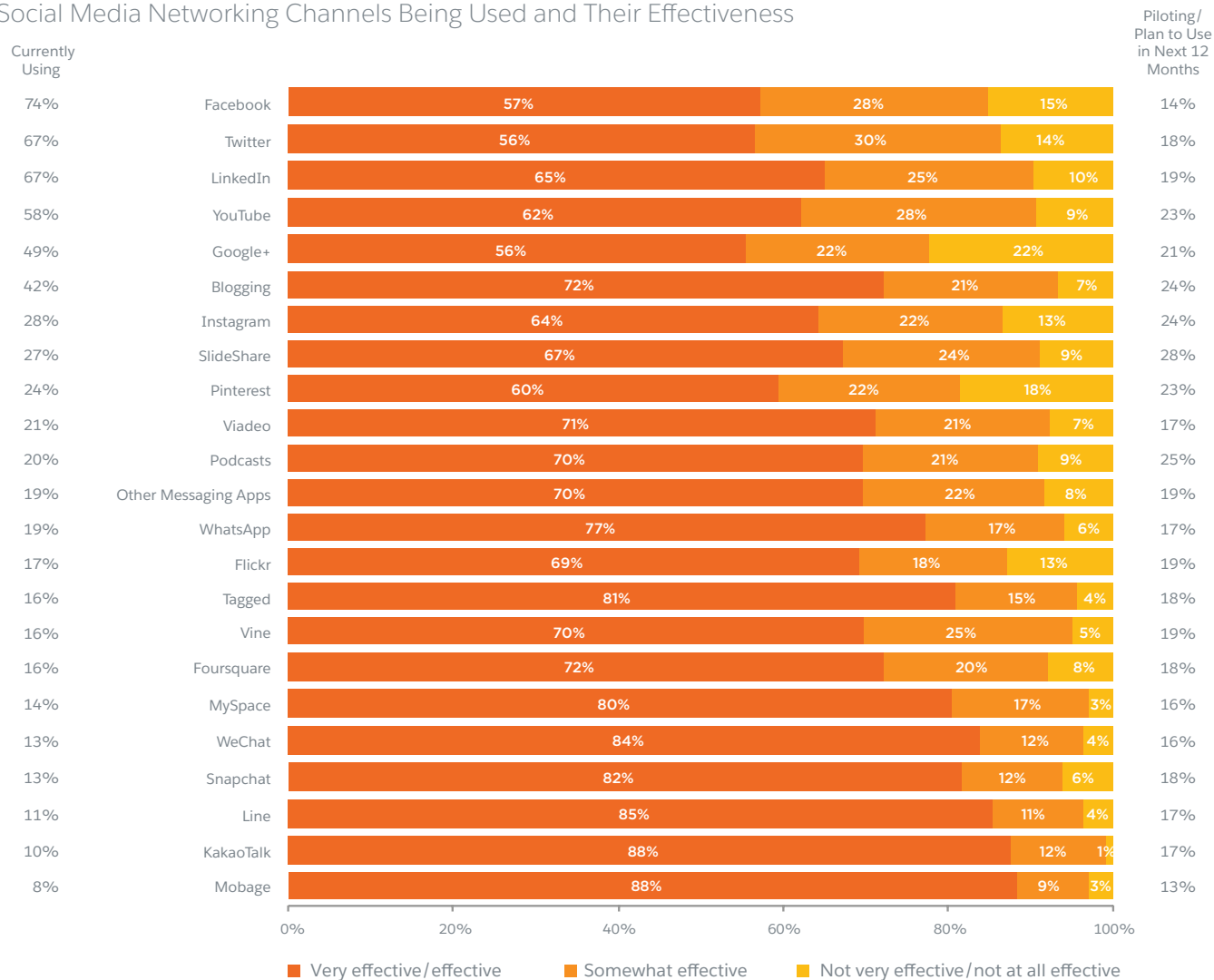- Social media marketing indirectly impacts our business performance

[11] http://contentmarketinginstitute.com/2014/10/2015-b2b-content-marketing-research/

Social Takes the Spotlight

Facebook continues to be the most popular social channel for B2B marketers to engage customers around the world. Interestingly, those who are experimenting with less popular channels are seeing great success. Line, KakaoTalk, and Mobage are used by small subsets of respondents (11%, 10%, and 8%, respectively), yet these fringe channels are rated as highly effective.
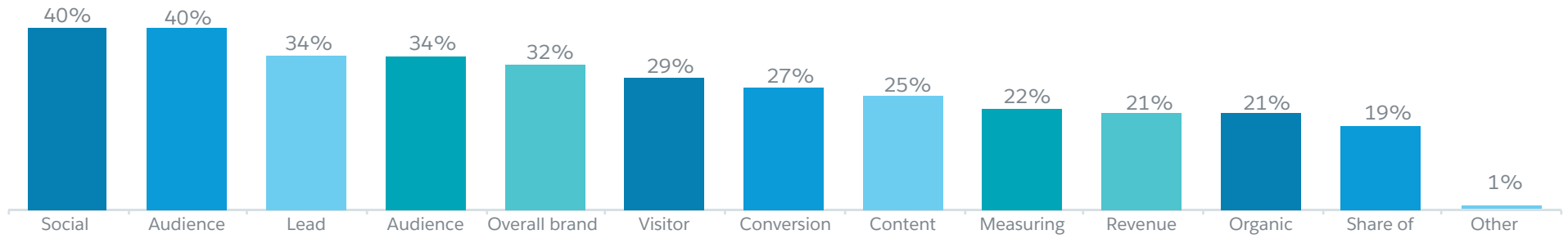
Note: Additional, country-specific social media channels were surveyed but are not shown in the overall report due to low base sizes.

Social Media Networking Channels Being Used and Their Effectiveness

Currently Using	Channel	Very effective/effective	Somewhat effective	Not very effective/not at all effective	Piloting/Plan to Use in Next 12 Months
74%	Facebook	57%	28%	15%	14%
67%	Twitter	56%	30%	14%	18%
67%	LinkedIn	65%	25%	10%	19%
58%	YouTube	62%	28%	9%	23%
49%	Google+	56%	22%	22%	21%
42%	Blogging	72%	21%	7%	24%
28%	Instagram	64%	22%	13%	24%
27%	SlideShare	67%	24%	9%	28%
24%	Pinterest	60%	22%	18%	23%
21%	Viadeo	71%	21%	7%	17%
20%	Podcasts	70%	21%	9%	25%
19%	Other Messaging Apps	70%	22%	8%	19%
19%	WhatsApp	77%	17%	6%	17%
17%	Flickr	69%	18%	13%	19%
16%	Tagged	81%	15%	4%	18%
16%	Vine	70%	25%	5%	19%
16%	Foursquare	72%	20%	8%	18%
14%	MySpace	80%	17%	3%	16%
13%	WeChat	84%	12%	4%	16%
13%	Snapchat	82%	12%	6%	18%
11%	Line	85%	11%	4%	17%
10%	KakaoTalk	88%	12%	1%	17%
8%	Mobage	88%	9%	3%	13%

Legend: Very effective/effective — Somewhat effective — Not very effective/not at all effective

Social Takes the Spotlight

Metrics Used to Measure Social Media Marketing Success

40%	40%	34%	34%	32%	29%	27%	25%	22%	21%	21%	19%	1%
Social	Audience	Lead	Audience	Overall brand	Visitor	Conversion	Content	Measuring	Revenue	Organic	Share of	Other

Recommendations

2015 Recommendations

This year's *State of Marketing* research makes it clear that marketers view digital channels as critical enablers of their company's products and services, and many of these channels are now core to business functions. If you'd like to make this report's data more actionable in your 2015 strategy, consider these recommendations.

Invest in building a better B2B customer journey.

- As mentioned, 86% of senior-level marketers say that it's absolutely critical or very important to create a cohesive customer journey. If other members of your team still don't see what all the "customer journey fuss" is about, you can help educate them. The presentation titled "The State of Marketing Leadership" on Salesforce Marketing Cloud's SlideShare account provides more insight and talking points on the subject.

- Complete an audit of your current technologies that are impacting the customer journey. Is this a combination of your CRM tools, marketing analytics, and mobile applications, as most B2B marketers said, or are their other unique touchpoints for your customers? If you can't readily identify the common touchpoints of your customer journey, talk with your customers to gain perspective.

Make every experience mobile.

- The number one most pressing business challenge for today's B2B marketer is new business development. Where is that new business hiding? On smartphones and tablets, which are increasingly responsible for a bigger portion of all time spent online.

- Landing pages, your corporate website, mobile apps, social media, and email – all of these are opportunities to offer customers a unique cross-channel mobile experience.

Spend strategically in advertising.

- More than ever, the time has come to evaluate the money you're spending on offline advertising with indefinable results. This year, 34% of marketers plan to shift spend from traditional mass advertising to advertising on digital channels. New technology sets allow for programmatic ad buying, where marketers buy only one ad at one time, for one person. This is the most effective way to target your online advertising. Look to add this technology into your stack of solutions, so that the data from ad engagements can be tied to your cross-channel customer journey, creating an "always-on" dynamic experience.

- Sixty-four percent of B2B marketers plan to invest more money in social media advertising and social media marketing next year. Realize that spending more money on social media won't work if your social presence is negligent or too self-promotional, so advertising and organic content must work in tandem.

2015 Recommendations: Email

Evaluate email's role in the customer journey.

- Subscribers keep their inboxes close, whether in their pocket or an always-open browser tab. Email can guide subscribers through many stages of the customer journey, but first evaluate the journey you're currently leading them on.

- Recognize that your work schedule won't always coincide with your subscribers' email-reading habits. Explore sending campaigns over the weekend, when subscribers may have more leisure time to peruse their personal email accounts and non-urgent messages.

- Ask the following questions as you map your email touchpoints: Are you sending too many welcome messages early on, but too few retention emails? Are your communications steady throughout the journey, or do they appear randomly whenever you're running a new campaign? How can the email customer journey become more one-to-one instead of one-to-many?

Breathe new life into email campaigns.

- Email has been around longer than social and mobile, but that doesn't mean your campaigns have to be stale. Many B2B marketers aren't testing campaigns that others have ranked extremely high in effectiveness. For example, newsletters are used most often but rank lower on overall effectiveness. On the flip side, mobile opt-in campaigns are rated one of the most effective campaigns, but only 22% of B2B marketers use them.

- Lead nurturing is the most relevant way to breathe new life into email. Building out relevant and timely communications via nurturing programs gives your email channel new staying power. Don't settle for a one-size-fits-all lead-nurturing model when you have the power to create specific campaigns for specific customer journeys.

Catch up with your subscribers. Design responsively.

- Email subscribers are voting for responsive design with every click, so if you're not already designing an easily navigable experience on mobile, it's high time.

- Don't forget tablets. Just as you should be designing for various smartphone devices, the tablet environment is another critical area for responsive design improvement.

2015 Recommendations: The Customer Journey

Step away from personas – and toward 1:1 experiences.

- Personas can be useful when trying to imagine how common types of customers may respond to your marketing, but aim for a single view of each customer instead of thinking too broadly.

- A cohesive customer journey looks at the unique people interacting with your messages and profiles, personalizing the journey based on their actions and preferences.

Evangelize the customer journey in your organization.

- First things first: ask your customers. What are their most common touchpoints with your brand? Which of those interactions feel personalized and which feel automated? At what point was your business over- (or under) communicating with them? Gaining this firsthand perspective on how your brand interacts in the "real world" is an invaluable tool in shaping how you view your customer journey.

- Next, host a customer journey-mapping brainstorm for coworkers with a whiteboard and an open mind. Invite team members from different sides of the organization – including sales, product, and services – to look holistically at the customer input you've gathered. When mapping a customer journey, don't tiptoe around poor experiences and gaps in the journey. Addressing issues and crafting better communications and technological solutions around them are the only ways to move forward.

Think about the customer journey beyond email.

- It's easier to think about how the customer journey applies to email because it's such a linear communication path: first this email, then that one. Try to incorporate omni-channel elements in your customer journey mapping, testing new channels based on where your audience spends the most time online.

- Which social channels are most successful for your brand? Mix up the types of messages that appear on social channels so that customers in various stages of the journey receive content that's relevant to them. Above all, always reply to individual customers' messages on social media. At no point in any customer's journey does he or she wish to be ignored.

2015 Recommendations: Mobile

Join the mobile majority.

- Consider 2015 "last call" to get started with mobile. With 43% of B2B marketers now having a dedicated mobile marketing team, you are behind the curve if you aren't headed in this direction.

- If you're part of the 27% of marketers who aren't tracking mobile analytics (or the 9% who don't know), take steps to remedy that now. Mobile analytics will help you pinpoint exactly how mobile fits into your overall customer journey.

Integrate mobile and reap the benefits.

- All signs point to mobile integration being a boon for business. B2B marketers report higher levels of effectiveness in other marketing channels, strategies, and technologies when mobile is integrated.

- Marketers who have integrated mobile into their overall strategy are three times as likely to have dedicated digital teams by channel and have larger teams overall.

Educate your team – and the larger organization – on the importance of mobile.

- The first step in integrating mobile with your overall marketing strategy is to help your team and larger marketing department understand the huge impact on business. Start by sharing this report, or pull out a few key statistics to share in your next presentation. Once others see the data behind mobile integration, it becomes easier to get things moving.
- Figure out who your internal mobile experts are – or turn to a trusted vendor – to assess any barriers that may exist between mobile and your other channels. Bring your mobile team together with your social, email, and web team to take a holistic look at how your customers currently interact via mobile as part of the journey with your brand.

Explore loyalty and location-based campaigns.

- Mobile loyalty campaigns have the highest very effective/effective rating at 86%. If you don't yet have a loyalty program, developing one with a mobile-first mindset is a smart way to start.

- Don't wait another few years to test out location-based content. With 65% of B2B marketers planning to substantially or somewhat increase spending in this category in 2015, you risk falling behind if you don't explore it.

- The conditions are right for location-based content – you just need to discover how your business can respectfully and relevantly use customer locations to create a more cohesive journey in the real world as much as the online world.

2015 Recommendations: Social

Test new social channels.

- Do your research on channels that might resonate best with your unique audience. Engage in some social listening to see if topics relevant to your brand or competitors are taking place on lesser-known social networks.

- Organic reach on the major marketing channels (like Twitter and Facebook) is trending downward, with an increased focus on "pay to play".[12] The best way to reliably reach your organic audience may be via multiple, more niche channels. Try polling your customers to understand the channels they frequent – and the different types of content they're looking to find on each.

- Consider using the chart on page 27 as a guide to test new channels, keeping these marketer ratings and, of course, your audience in mind.

Get serious about social.

- Invest the resources – both headcount and budget – to support social as a viable channel, because it is. With 56% of B2B marketers rating it as core to their business, it's no longer the outlier it once was.

- If you're not yet seeing significant business results from social, start small. What's the one channel where your social audience is most responsive? Direct more resources to growing that space instead of spreading your efforts too thin.

Adopt a round-the-clock strategy.

- New data shows that users are most engaged on social media during weekends – which is when brands post the least frequently.[13] Designate on-call social managers for every hour of the day, because customers interact on their own terms when it comes to social channels.

- True, you can schedule messages on Facebook and Twitter in advance – but you shouldn't schedule ahead with no one available to reply. Messages posted to social channels should incite customer questions and engagement, and few things can frustrate customers more than a question that goes ignored, especially when the brand just posted moments earlier.

- Test what works for your own social audience. We recommend doing an internal benchmark study: track time of day and day of week social engagement for at least three months, then see when engagement was highest and lowest. Focus your social efforts around these findings.

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[12] http://www.convinceandconvert.com/social-media-tools/this-chart-explains-the-reachpocalypse-and-why-facebook-is-laughing-all-the-way-tothe-bank/
[13] Social Engagement Benchmark Report: Facebook and Social Engagement Benchmark Report: Twitter, Salesforce Marketing Cloud, September 2014

Conclusion

Digital marketing as we know it is fundamentally changing. Marketers and industry watchers previously viewed digital marketing as simply one category within marketing – one tool of many in a marketer's kit. Increasingly, perception is shifting to a more holistic view where all marketing is part of the digital world.

No matter which tactics, technologies, channels, and strategies you adopt in 2015, remember that every touchpoint is an opportunity to improve and influence the digital customer journey.

Survey Methodology and Demographics

Survey Methodology and Demographics

The *2015 State of Marketing* survey was conducted online from October 28, 2014 to November 25, 2014. The survey was sent to full-time marketers in the Salesforce Marketing Cloud's locations around the world. A total of 5,053 marketers completed the survey, with 2,199 stating they worked in the B2B space. The survey took 17 minutes and 26 seconds, on average, to complete. Due to rounding, not all percentage totals in this report equal 100%.

The following charts display the demographics of B2B marketers who completed the survey.

Region

North America (U.S., Canada)	54%
South America (Brazil)	11%
APAC (Australia, Japan)	11%
EMEA (U.K., Nordics, Germany, France)	20%

Country

Australia	4.55%
Brazil	10.91%
Canada	4.41%
France	6.73%
Germany	6.73%
Japan	6.91%
Nordics (Finland, Norway, Sweden, Denmark)	3.23%
United Kingdom	6.46%
United States	50.07%

The Nordics 71
United Kingdom 142
Germany 148
Japan 152
Canada 97
United States 1,101
France 148
Brazil 240
Australia 100

Survey Methodology and Demographics

Company Size

Small: 1-200 Employees	52%
Mid-Sized: 201-2,500 Employees	36%
Enterprise: 2,500+ Employees	13%

Industry

Technology & Manufacturing	22%
Professional Services	12%
Advertising & Marketing Agency	10%
Insurance	6%
Life Sciences	5%
Wholesale Trade	4%
Financial Services	4%
Construction	4%
Telecommunications & Utilities	4%
Education & Non-Profit	4%
Media & Entertainment	3%
Healthcare	3%
Transporation, Logistics, & Warehousing	3%
Other	18%

Role

Owner or Equivalent	13%
Chief Marketing Officer	9%
Vice President	6%
Director or Equivalent	15%
Manager or Equivalent	24%
Self-Employed or Consultant	7%
Coordinator	6%
Analyst	5%
Developer	6%
Associate	3%
Designer	4%
Other	2%

Time in Role

Less than 1 Year	3%
1-2 Years	10%
3-5 Years	29%
6-10 Years	29%
11-15 Years	11%
More than 15 Years	18%

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