



ON24

The State of Digital Maturity in Europe

The tools, techniques, and strategies marketers need to drive results

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Foreword

Right now, B2B marketers in Europe are under significant pressure. Economic uncertainty means there will be a demand for efficiency in budgets. Inflation is leading to higher costs from suppliers and vendors, making decisions even tougher. At the same time, many challenges persist, particularly the continuous change in buyer behaviour and the martech landscape. For organisations that are behind on their digital maturity, these issues and others are harder to manage

However, when it comes to industry studies on digital maturity and B2B marketing, there has historically been a lack of data specific to the European market. As many vendors come from the United States, surveys also tend to focus on North American marketers — with limited coverage across Europe, with key regions missing. So, what is the situation for B2B marketers in Europe?

To answer that question, ON24 ran a survey across 12 key countries and in nine different languages, reaching more than 800 B2B marketers across the continent.

The data uncovered reveals several important trends. For example, we discovered that maturity levels vary across Europe — meaning that the necessary actions to adopt and better use digital tools will vary considerably between countries and companies. In line with other studies, we found that business performance is strongly linked to digital maturity within B2B marketing.

The research also shows many markets are confident in their performance. However, the self-assured may need to take another look. While B2B marketers in Europe may perform well in the areas of strategy and data, far fewer are translating this into driving action and experiences.

For example, three-quarters of respondents claim that if they were a buyer, they'd be very or reasonably satisfied with the experience their company offers. But the share of marketers using a healthy number of experience tools is far lower. In fact, not a single channel is personalised by the majority of marketers — even email. Furthermore, less than half incorporate touchpoints such as video, live chat, and content recommendations.

For B2B marketers in Europe to have a significant and lasting impact on the bottom line, not only do they have to improve their digital maturity — they also need to be honest about the experiences they are offering buyers.

So, are you ready to improve your maturity and drive action? If so, grab your coffee, tea or drink of choice and see what other B2B marketers are doing across Europe.



Executive summary

This report is based on a survey of more than 800 B2B marketers across 12 different countries in Europe. It examines digital maturity across the region, along with some of the key practices and perspectives that marketers have in the region. Here are the key takeaways.

Digital maturity differs somewhat across Europe

Despite European countries sharing much in common, many areas differ — from language and culture, to business behaviours and law. Digital maturity is another area where differences are present.

The survey reveals some differences in digital maturity levels between different regions in Europe. **Southern Europe (Italy, Portugal and Spain) has both the highest level of respondents with an advanced maturity score and those who are novices.**

The Benelux (Belgium and the Netherlands) region had no respondents who scored in the advanced range.

These differences highlight the fact that there is no one-size-fits-all approach to improving digital maturity. B2B marketers in every country will need to assess their own organisation individually to determine which actions are necessary for performance.

Digital maturity is strongly correlated with business success

Analysis of the data demonstrates that **there is a strong link between digital maturity and business success.** Of those respondents who exceeded their business goals by a significant margin, more than half (52%) also had the highest maturity level — compared to just 15% of novices. This suggests that B2B marketers who improve their level of digital marketing maturity can expect to see higher levels of performance.

The majority of European B2B marketers surveyed are adopting good practices with their marketing strategy. **Close to nine in 10 (87%) have a strategy that is aligned with both marketing and sales goals, while one in five use engagement and performance data to revise their strategy throughout the year.** A similar percentage (85%) also claims that goals are “always” set for tactics or digital experiences.

Similarly, results in the area of data and measurement are good. About two-thirds claim to centralise and standardise data from all systems and have a single customer view. Added to that, **nearly seven in 10 claim that they either have “good” or “excellent” visibility into marketing’s contribution to pipeline.**



Executive summary

B2B marketers in Europe are less likely to translate strategy into action

Despite healthy maturity levels in strategy and data, putting those into action may still be somewhat behind. **On average, marketers scored 70% of the maximum in the area of strategy, process, and people — but only 47% in driving action and engagement, and just 33% in experiences and personalisation.**

This appears to not be because awareness of best practice is lacking; rather that intentions to offer buyers more are not being followed through. For example, more than nine in 10 agree that personalised digital experiences help break through the noise with their buyers. However, **only one in three use either contact-level or account-level engagement data to personalise digital experiences and content.**

Furthermore, **not a single digital experience or channel is personalised by the majority of European marketers, including email.**

And, while nine in 10 agree that stronger engagement results in stronger pipeline, **B2B marketers only use an average of 3-4 out of 10 techniques and tactics listed to drive action and engagement.** An even smaller percentage use five or more.

European marketers are positive about their experience, but this confidence may be misplaced

A well-developed strategy may be creating an illusion of maturity, given that many marketers appear to be over confident about the quality of their digital experiences.

A majority are at least reasonably satisfied with the quality of their digital experiences, but they may not be meeting their buyers' expectations. Few are opting to use interactive experiences such as polls, surveys, group chats and quizzes and **less than half are using more popular options such as video and content recommendations.**

Improving maturity may require as much of a focus on people as technology

When asked about their challenges and barriers to improving marketing performance, answers revealed that the most common problems related to people. **The two most commonly-cited challenges were hiring the right people (43%) and a lack of alignment between marketing and sales (39%).** Furthermore, when asked to choose their top three barriers, the top two issues were not enough staff (35%) and IT or development roadblocks (33%).

These findings suggest that any plan to improve digital maturity needs to incorporate the human element. Given that marketing is fundamentally about understanding people, this department is well-placed to overcome these issues, improve digital maturity and deliver better buyer and customer experiences.



Key findings

A number of research studies have identified that European businesses tend to lag the United States when it comes to technology. This gap isn't just about having fewer tech giants — it also applies to how tech is used. For example, a study by the lending arm of the European Union found that only four countries had higher levels of digitalisation than the US and that higher levels were associated with better firm performance.

However, although there is a wealth of information about digital maturity in Europe for business overall, there are very few studies specific to B2B marketers.

Given that such studies are most often conducted by martech vendors — and that Europe has a far smaller number of vendors — this should come as no surprise. This study aims to fill that gap.

To do so, ON24 and Market2Marketers fielded a survey across 12 European countries and in nine different languages.





Overall maturity

To examine how European B2B businesses are faring when it comes to digital maturity we included a set of 14 questions as part of the larger survey covering five key areas of digital maturity:

- **Strategy, process and people**
- **Data and management**
- **Driving action and engagement**
- **Tech adoption and use**
- **Experiences and personalisation**

Each answer to one of these questions was scored depending on the response. Those indicative of higher maturity received a higher score.

After this, the total was then added up and respondents were assigned to one of five different maturity levels. From most to least mature, these are:

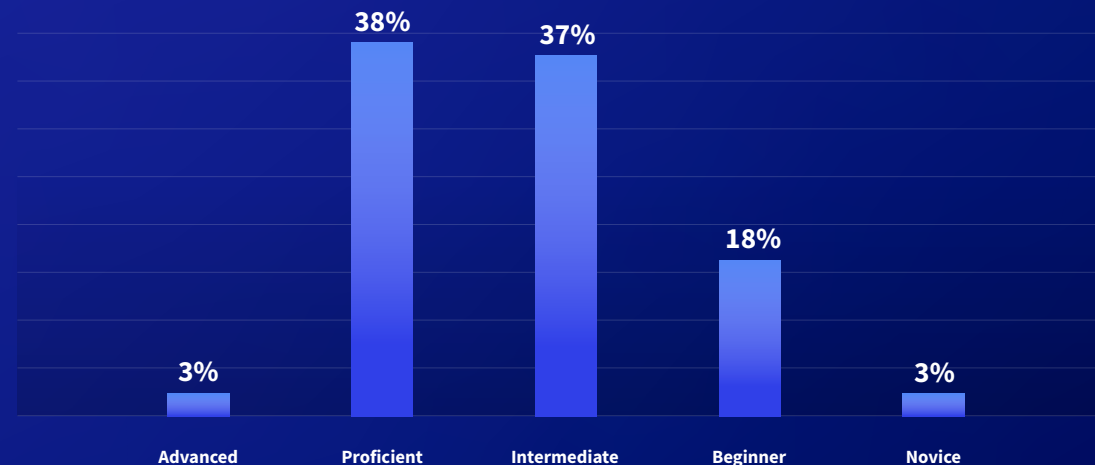
- **Advanced**
- **Proficient**
- **Intermediate**
- **Beginner and**
- **Novice**

The scores for each question and the boundaries for each level can be found in the Appendix.

Maturity levels

Based on the scoring criteria, many respondents appear to be demonstrating good levels of maturity. That being said, there remains opportunity for improvement, as 21% are within the “Beginner” and “Novice” categories, while 37% are classed as Intermediate.

Maturity rating of respondents



To avoid underweighting, only respondents that provided an answer to every scored question were assigned a maturity rating. Numbers may not add up to 100% due to rounding.

But that only tells part of the tale. Here are some key findings based on digital maturity levels.

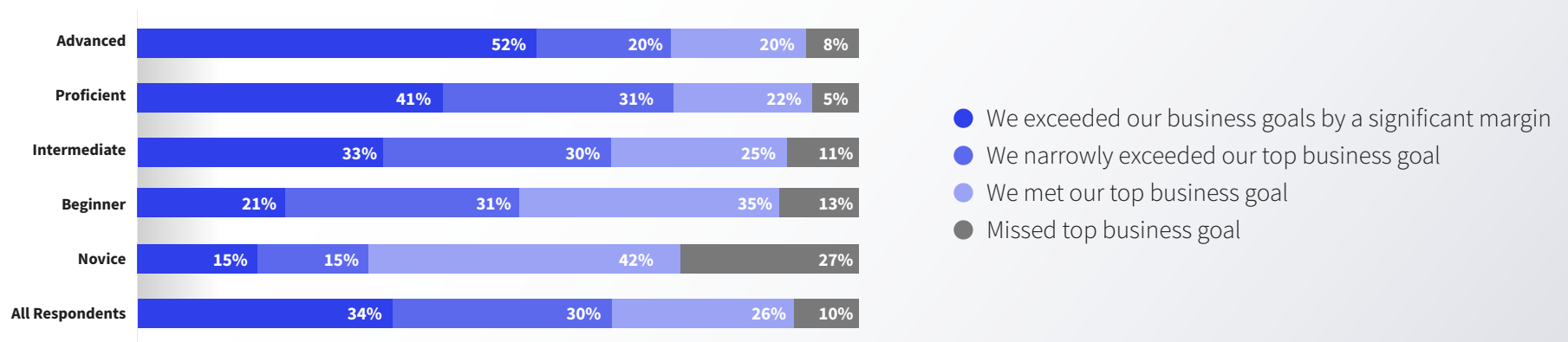
ON24 Tip: Assess your own maturity level to understand where you stand.

Assessing your maturity level can help you understand where you perform well and where you need to close the gap. You can find the questions we used in the appendix of this report. To find out more about digital maturity check out our webinar [From Good to Great: How to Strengthen Your Digital Marketing Maturity](#).

Marketing maturity and business performance

To assess whether digital maturity was associated with improved performance, respondents were asked how to describe how their company performed last year against its goals.

Business performance by maturity level



There is a strong link between digital maturity and business performance. A little more than half (52%) of respondents with the highest maturity rating report that they had exceeded their business goals by a significant margin. Counter to that, only 15% of those with a Novice rating were able to say the same. Instead, some three in 10 (27%) Novices missed out on their top business goals.

While this study was specific to European B2B marketers, the alignment of digital best practice and business performance has consistently been demonstrated in other studies. Research by [Deloitte](#) in 2020 found that while only 15% of lower maturity firms achieved significantly higher revenue growth, close to half (45%) of higher maturity businesses did so. Similarly, analysis

by [BCG](#) found that digitally mature brands saw an average revenue increase of 18 percentage points and cost savings of 29 percentage points — and are more than twice as likely to grow market share.

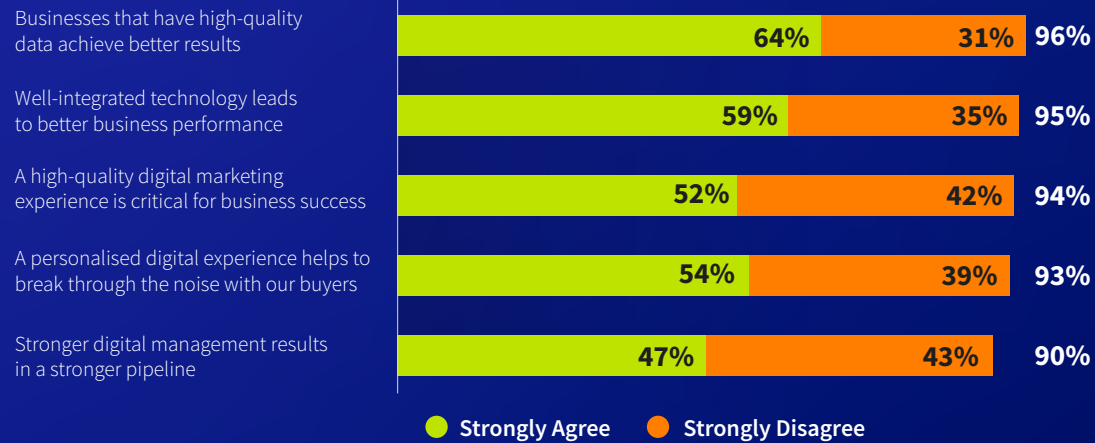
What does this mean for B2B marketers? While arguably there are several factors that influence business performance, these findings indicate

that digital maturity plays an integral part. Furthermore, across the areas of digital maturity, respondents overwhelmingly agree with the potential benefits.

Businesses should take steps to improve their level of digital maturity. In doing so, they can expect to see higher levels of performance and more of their top goals being met.



To what extent do you agree with the following statements?



Percentages on the right illustrate total agreement (either strongly or somewhat). Options not included in the chart are “Somewhat disagree” and “Strongly disagree”.

ON24 Tip: Use the data from this report and other benchmarking studies to build a business case for strengthening your digital maturity.

While some steps to digital maturity won't require any additional budget, others may necessitate building a business case for investment. To do so, industry studies such as this report and others can help to strengthen your argument. The same approach can also be used to win budget for individual campaigns or to invest in particular technology. For another ON24 study on what separates out top-performers from the rest, check out [What Top-Performing B2B Marketers Do Differently](#).



Marketing maturity and company size

To assess whether digital maturity was associated with improved performance, respondents were asked how to describe how their company performed last year against its goals.

However, the largest companies with 10,000 employees or more are also those which are significantly more likely to be operating at the highest levels of maturity (16%). This should not come as a surprise, given that they are also likely to be able to invest the most. That being said, size also makes it harder to change — which may also be why such companies are also more likely to have a maturity in the bottom two categories (31%) compared to businesses with between 100 and 10,000 employees.

According to the [European Investment Bank](#), company size is a significant reason behind differences in the adoption of digital technologies.

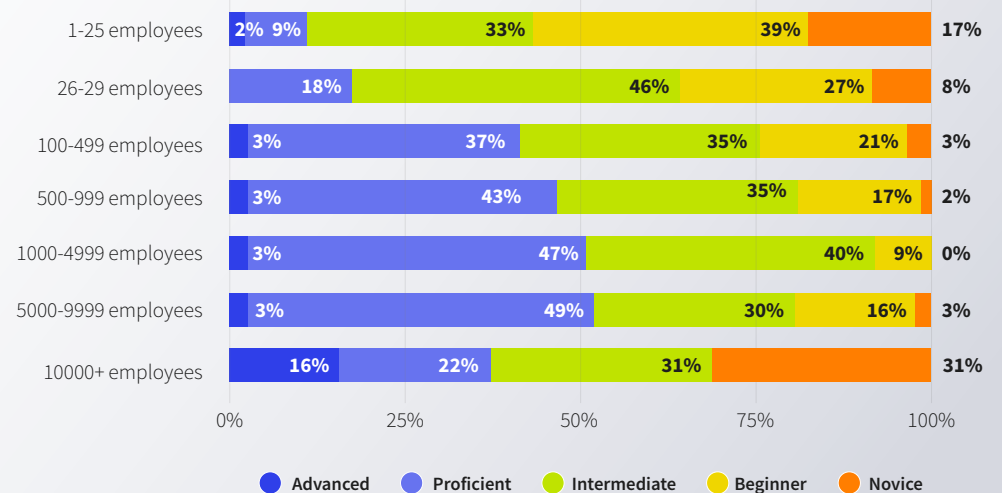
It noted that:

“Larger firms have higher rates of digital adoption than smaller firms. Both in the US and in the EU, the adoption of digital technologies increases with firm size...”

The fact that EU firms are on average smaller than in the US is thus likely to be a major disadvantage for fast-tracking the adoption of digital technologies. There are many old and small firms in the EU that are not investing in digital technologies.”

European Investment Bank

Company size and maturity



ON24 Tip: Make the most of your organisation's strengths even if you are a small company.

Each organisation's unique set of circumstances will give it both particular strengths and particular weaknesses. Use these to your advantage. For example, while smaller companies may not have the largest budgets, they can potentially be more agile in responding to opportunities. Indeed, this is why the largest organisations don't necessarily have the best level of digital marketing maturity. For more information on how you can make the most even limited budget check out [The Marketer's Guide to Scrappy Marketing](#).

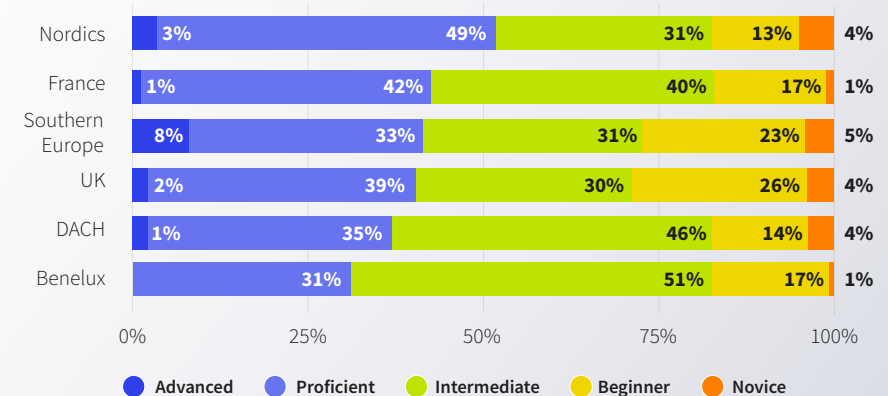


Differences in maturity across Europe

The level of digital maturity varies across the different European regions. Southern Europe, which includes Italy, Portugal and Spain, has the highest percentage of respondents with an advanced maturity score (8%). It's also the region with the highest percentage of those who are novices (5%).

Although Southern Europe has the highest percentage of respondents with an advanced maturity score, at 52%, the Nordic region claims the highest percentage of those with either advanced or proficient digital maturity. By contrast, only 31% of those in the Benelux region (Belgium and the Netherlands) ranked as proficient, with none at the advanced level.

Maturity level by region



Regions covered for respondents: Benelux = Belgium and Netherlands (no respondents from Luxembourg); DACH = Germany, Austria and Switzerland; Southern Europe = Italy, Portugal and Spain.



ON24 Tip: Don't let geography limit your company's potential. Reach buyers wherever they are.

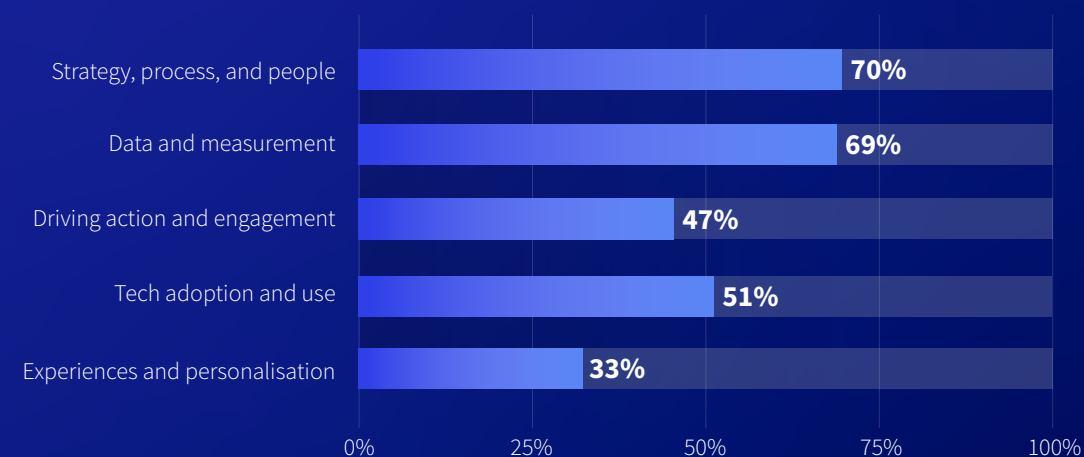
While this study shows that maturity levels differ across markets, that shouldn't impact where you find your buyers. In fact, digital buying behaviours now mean that you can reach and connect with customers anywhere. To find out how you can drive one-to-one engagement well beyond your market, tune into our webinar [How to Successfully Localise and Translate Your Events, Presentations and More.](#)



Maturity by key area

As a whole, European marketers look to be adopting good practices regarding strategy and data. On average, total respondents scored 70% in the area of Strategy, Process, and People, with respondents in Denmark (79%), and Switzerland (78%) scoring above average in this area. Likewise, when looking at the area of Data and Measurement, total respondents scored an average of 69%. Again, Denmark (82%), and Switzerland (76%) scored above average.

Average total maturity scores across key areas



100% represents the maximum possible score for each individual area.

Respondents did not fare as well when it comes to Driving Action and Engagement (47%), Tech Adoption and Use (51%), or Experiences and Personalisation (33%). As we examine each of these areas more closely, the reason for the lag in these areas should become apparent.

ON24 Tip: Avoid analysis paralysis or getting stuck in strategy. Make sure you are also driving great buyer experiences.

Strategy only matters if it is followed by effective execution. For marketers, that means that buyers need to be effectively engaged. This will come from delivering high-quality, relevant and personalised experiences, which needs the use of the right data and tech.

To find out how to make the most of your technology and drive the best possible results. Read our blog post on [Building a Tech Stack That Supports a Predictable Pipeline](#).



Strategy, process and people

The importance of strategy, process, and people has been demonstrated repeatedly within business for many years. From Philip Kotler's work on identifying customer needs, Peter Drucker on managing people, or Toyota's kaizen process of continuous improvement, it is clear that businesses can achieve significant advantages when these areas are effective.

Strategic approach and goal setting

As we saw in the previous section, a majority of B2B marketers in Europe appear to be taking up beneficial practices insofar as their marketing strategies are concerned. Nearly nine in 10 (87%) have a strategy that is aligned with both marketing and sales goals. Some 45% of those respondents rate their marketing strategy as advanced, saying that their strategy is not only aligned with both

marketing and sales goals but they also have a go-to-market plan based on key segments and target accounts.

Similarly, some 85% of respondents claim that they "always" set to tactics or digital experiences, with about three in 10 (28%) saying that these goals not only align with their overall marketing and sales but with broader business targets.

Which of the following best describes your organisation's marketing strategy?

Advanced — as per 'Advanced' but we also will use engagement and performance data to revise our strategy throughout the year

20%

Proficient — our strategy is aligned to marketing and sales goals and we have a go-to-market plan based on key segments and target accounts

45%

Intermediate — we have a strategy aligned with both marketing and sales goals and we have a go-to-market plan for our key segments

22%

Basic — we have a simple strategy and a list of tactics or campaigns we plan to use

11%

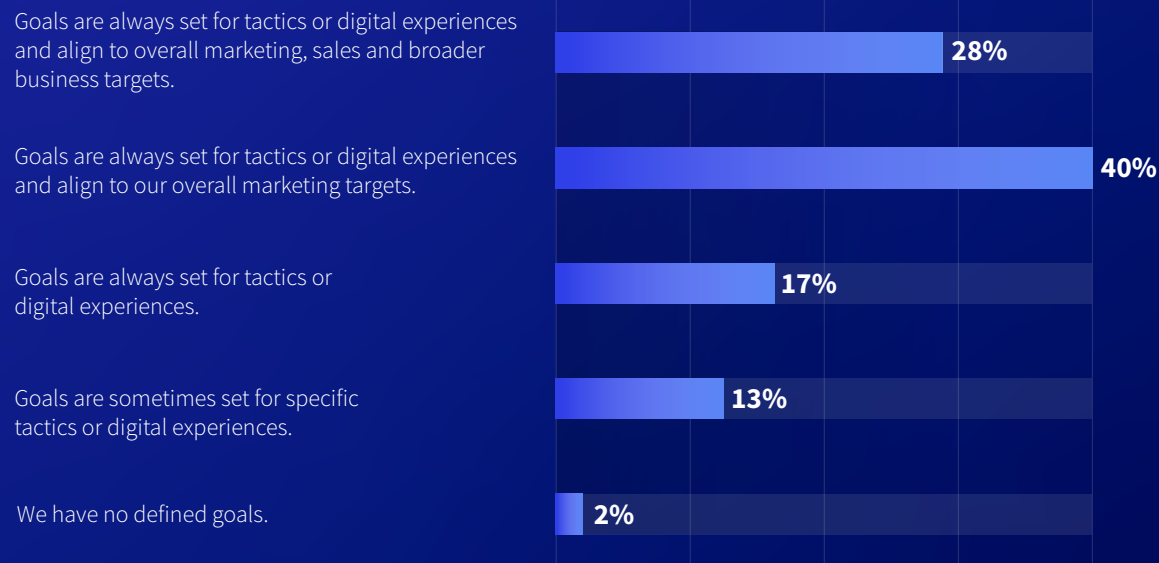
We do not have a marketing strategy

2%



Strategy, process and people

How does your marketing team typically set goals for your tactics and digital experiences?



ON24 Tip: When setting or revising your marketing goals gain the input of other key stakeholders (especially sales).

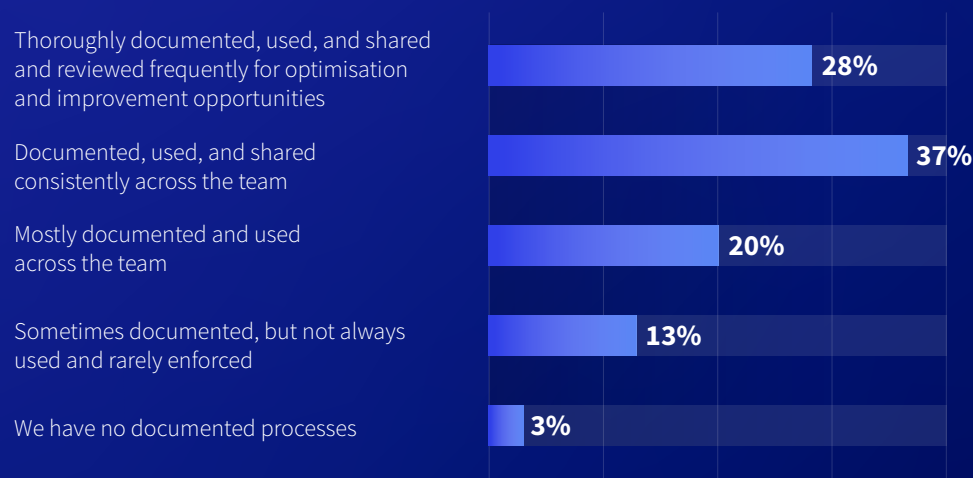
Improving your marketing impact (as well as your overall digital maturity) will require the buy-in and support from people across your organisation, especially sales. To increase the chances that you'll get approval, speak to others about what matters to them before setting goals. For an example of how to do that with events, check out our webinar on [The Art of Aligning Sales and Marketing for Maximum Event Conversion](#).



Use of defined processes

Earlier [research from the Content Marketing Institute](#) has tied having a documented marketing strategy to B2B business success. This more recent survey indicates that European B2B marketers understand this link. Some two-thirds (65%) of respondents report having documented processes that are used and shared across their marketing teams, with more than one-quarter (28%) saying these processes are reviewed frequently for optimisation and improvement opportunities.

Which statement best describes your use of defined processes in marketing?



100% represents the maximum possible score for each individual area.

Respondents did not fare as well when it comes to Driving Action and Engagement (47%), Tech Adoption and Use (51%), or Experiences and Personalisation (33%). As we examine each of these areas more closely, the reason for the lag in these areas should become apparent.

ON24 Tip: If you don't have your marketing processes documented, start small and add to them over time.

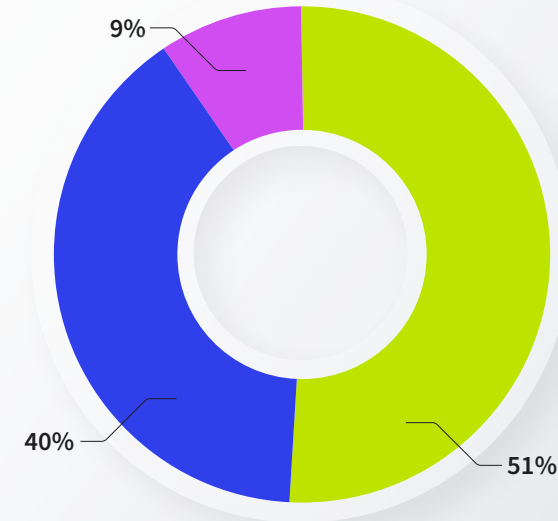
Documenting your entire marketing processes can be a huge task — and as soon as it's done, chances are you'll need to edit it again. To save yourself time and build results from the very beginning, focus on documenting the most important and most commonly used marketing processes. Furthermore, by giving your team the ability to edit them, you can encourage knowledge sharing and help keep it up-to-date. Don't worry about making it too complicated, as even a simple wiki or documents shared via existing tools (e.g. SharePoint or Google Drive) will be far better than nothing at all.

Use of buyer journey stages

Only one in 10 (9%) don't have clearly defined stages for the buyer's journey. The vast majority of respondents report either having multiple buyer journey frameworks based on different customer types or profiles (51%) or having a single buyer journey framework with stages mapped out (40%).

This is a positive finding considering that understanding and optimising the buyer's journey in the digital space allows marketers to create content and experiences that help move buyers along in their journey even when that journey doesn't take a linear path. And, with buyers wishing to do more research online before getting in touch with sales, marketers have to ensure they are ready to meet the buyer wherever they are and help them along their journey.

Do you have clearly defined stages for the buyer's journey?



● Yes — We have multiple buyer journey frameworks based on different customer types or profiles ● Yes — We have a single buyer journey framework with stages mapped out ● No

ON24 Tip: Use buyer journey stages to help plan, create and personalise your marketing.

Buyers have different needs depending on which stage of the journey they are at. If you have a gap in your marketing at that stage, it may reduce how many convert to the next stage and marketing's overall impact on the bottom line. To find out the key steps of mapping out your buyer journey stages and building out predictable revenue, check out our on-demand workshop on [How to Create a Winning Playbook for Predictable Pipeline](#).



Data and measurement

In any area of business, data is an essential component for measuring performance against department and organisational goals. But for B2B marketers, data has another essential function in today's digital buying environment. Data can be used to understand buyers and to determine the experience they should receive.

Approach to collecting marketing data

The importance of data is not lost on today's B2B marketers. An overwhelming majority of survey respondents "strongly agree" (64%) or "somewhat

agree" (31%) that businesses which have high-quality data achieve better results. And, for the most part, respondents are doing well in the area of data and measurement. Two-thirds (65%) centralise

and standardise data from all their systems and have a single customer view. Indeed, only a scant few (2%) report that they don't collect data or do so incidentally.

Which of the following best describes how your organisation collects marketing data?

We centralise and standardise data from all our systems, have a single view of each account, and contact and use it to drive processes and actions

28%

We centralise and standardise data from all our systems and have a single view of each account and contact

37%

We centralise some data from different systems

21%

We collect basic, aggregate data but in separate systems

12%

We do not collect data or do so incidentally

2%

ON24 Tip: You don't need to centralise all of your data all at once.

Integrating systems in the right way can sometimes be fraught with difficulty, especially if you are using data from different systems to drive complex processes. If you are starting out, first begin with centralising, standardising and checking the quality of only the data you need in order to drive processes and measure results. Taking a gradual and iterative approach will likely result in fewer errors and deliver improvements more quickly.

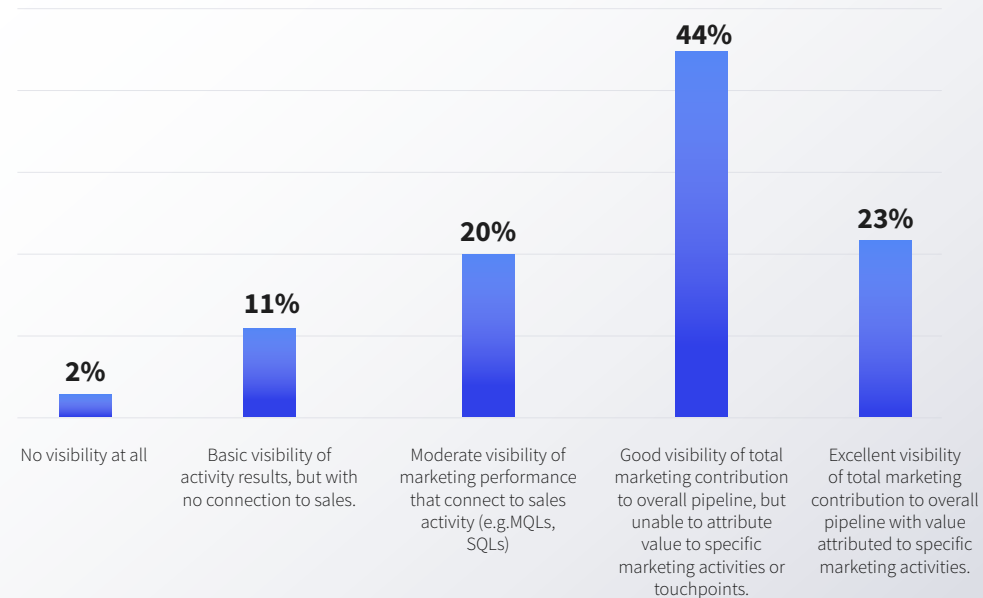


Visibility on contribution to revenue

When respondents were asked how much visibility they have in terms of marketing's contribution to revenue goals, nearly one-quarter (23%) report that they have excellent visibility into marketing's contribution to pipeline.

Another 44% say that while they have good visibility of total marketing contribution to overall pipeline, they are finding it difficult to attribute value to specific marketing activities or touchpoints.

How much visibility do you have in terms of marketing's contributions to revenue goals?



ON24 Tip: Take small steps when improving visibility of marketing performance.

Achieving perfect visibility into marketing activity can be a near-impossible task — and getting excellent visibility takes a lot of effort and work. However, don't let that get in the way of getting started. Take an iterative approach to improving measurement and tie it to sales metrics wherever possible. In addition, remember to regularly check the validity of any claim of marketing performance. To maintain credibility across the business, it's better to be honest when you don't know the impact marketing has rather than give inaccurate answers. To find out more read our blog post on [buyer intelligence and data detective work](#).



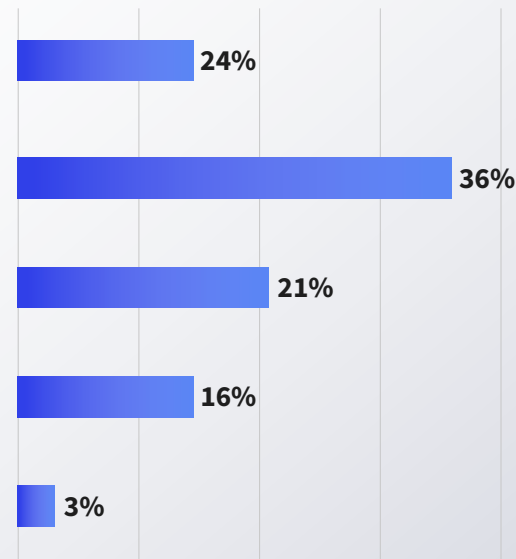
Ability to collect buyer engagement data

Further good news on the data side, eight in 10 (81%) respondents are collecting engagement and action data from multiple touchpoints in order to understand their buyers. This is in line with [global data](#)

from [Salesforce](#) that shows that in 2021 B2B marketers used an average of nine data sources to drive engagement, with this number expected to increase in 2022.

To what extent are you able to collect engagement and action data to qualify and understand your buyers?

We collect engagement data from multiple touchpoints, align it by buyer journey stage, and make it available to sales and other teams.



We collect engagement data from multiple touchpoints and use it to align contacts and accounts by buyer journey stage.

We collect engagement data from multiple touchpoints and use basic scoring to qualify leads, contacts or accounts.

We collect basic data (e.g. form fills, event registrations) but do not use it to qualify our buyers.

We do not collect engagement data at an individual level.

A further breakdown of that percentage shows that about one-quarter (24%) align that data by buyer journey stage and make it available to sales and other teams.

By contrast, fewer than one in five (16%) collect basic data such as form fills and event registration but don't use it to qualify their buyers.

ON24 Tip: Harness your company's first-party data and put it to good use.

While third-party data has its place and is particularly useful at the account-level observations, the first-party data you're able to glean from interactions on your company's own channels is invaluable in telling you who is engaging with your content. This gives you insight into the actual buyer, making it possible to personalise your engagement with them. Check out the [B2B Trends: Harnessing the Power of First-Party Data ebook](#) for more information.

Use of data to improve content and experiences

Marketers are putting data to good use. The majority (85%) say that data is used to inform content and overall themes. The largest share of those respondents says they also use data

to inform how they drive interactivity and conversions (42%), while 23% say they use data to do all the above and to help improve their strategy.

How does your marketing team use data to improve its content and digital experiences?

Data is used to inform all the below and to improve our strategy

23%

Data is used to inform content, themes, and how we drive interactivity and conversations

42%

Data is used to inform content and overall themes

20%

Data is sometimes used to info content

12%

We don't use data to improve our content or digital experiences

3%

ON24 Tip: Take advantage of all the good data you collect to create multichannel experiences throughout the buyer's journey.

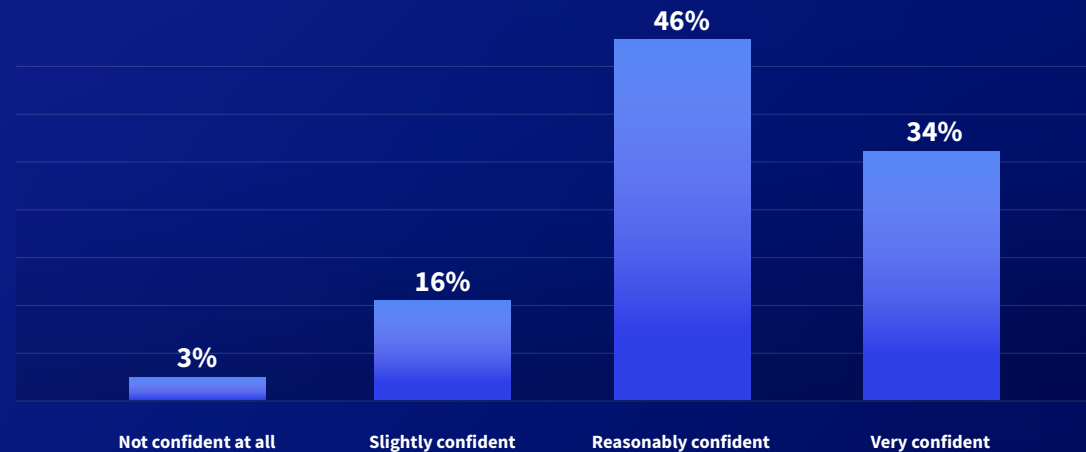
Put all that informative engagement data you've collected to good use. Use it to identify where your buyers are in their journey, create content of value and drive further engagement across a multitude of channels. To learn more about how to accomplish this, check out our webinar on [How to Use Engagement Data to Power Integrated Experiences](#).



Confidence in data quality

Confidence in the data that European marketers are collecting appears to be high. A full eight in 10 report that they are either “reasonably confident” (46%) or “very confident” (34%) in the quality of their organisation’s marketing data.

In your opinion, how confident are you in the quality of your organisation’s marketing data?



ON24 Tip: Be cautious and honest with your organisation’s data quality.

All organisations have at least some difficulty with data. It’s natural for marketing data to decay over time, for buyers to add incorrect data, or for values to differ in different place. It is far better to be honest and

cautious with your data, rather than making claims that are found not to be valid. Presenting wrong data without caveats can damage your credibility across the business, as well as leading to you overestimating

the potential impact of your efforts. Remember, it’s far better to under promise and over deliver as opposed to the other way around.

Driving action and engagement

For B2B marketers to maximise their impact on revenue, generating lists of leads is not enough. With buying journeys consisting of multiple touches, they need to ensure they are doing everything they can to support that process — as well as identifying the most engaged prospects for follow up by sales.

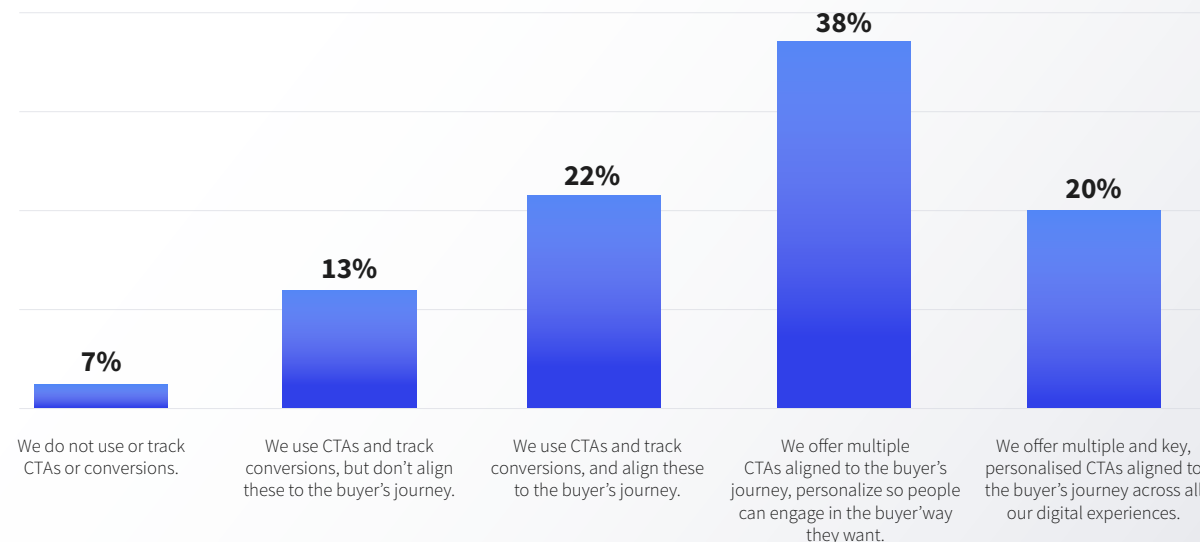
However, the survey suggests that European marketers may not be making the most of today's tools and technology.

Use of calls-to-action and conversion touchpoints

Calls-to-actions are fundamental to moving buyers through the buyer's journey. While the vast majority of respondents (93%) use calls-to-action (CTA)

and track conversions, only one-fifth are doing so in a personalised way. Instead, a similar share (22%) who use CTAs and track conversions only align them to the buyer's journey, while 13% don't even do that.

Which of the best describes how your marketing team incorporates calls-to-action and other conversion touchpoints?



ON24 Tip: Not all CTAs are created equal. Create ones that will encourage buyers to move forward in their buying journey.

An effective call-to-action will drive buyers to interact further with your brand even if they aren't quite ready to make a purchase — and given that buyer journeys consist of many different touchpoints, too much of a focus on driving meetings or calls can put buyers off if they don't yet feel comfortable. To learn more about how to write stellar calls-to-action, as well as when and where to use them, check out our blog post: [How to Write an Amazing Call to Action.](#)

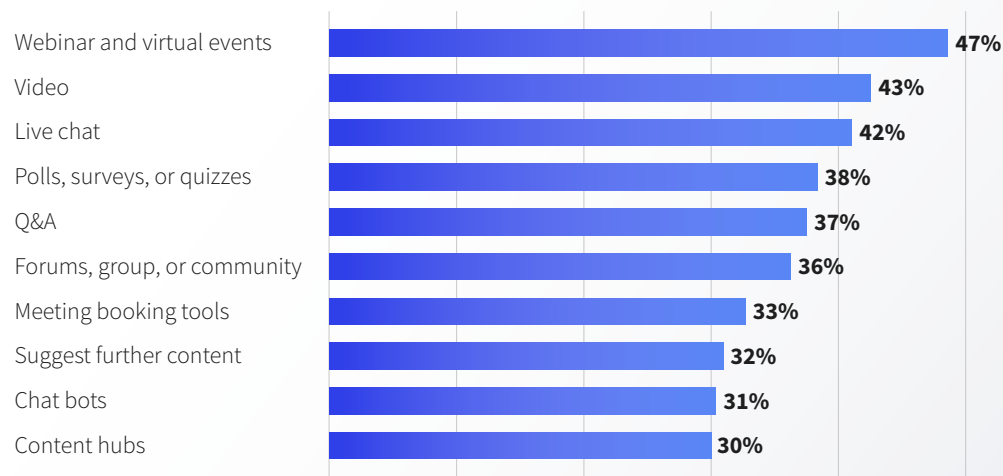


Tactics to used drive engagement

Respondents claim to be using an array of techniques and tactics to drive action and engagement with the top tactics including webinars and virtual events (47%), video (43%), and live chat (42%). However, even though nine in 10 agree that “stronger engagement results in a stronger

pipeline”, on average, B2B marketers only use three or four out of the 10 techniques and tactics listed. Even more telling, only 15% are using five or more of those tactics and techniques provided in the survey.

Which of the following techniques and tactics do you currently use to drive action and engagement?



ON24 Tip: Utilise an array of tactics and techniques to keep audiences engaged.

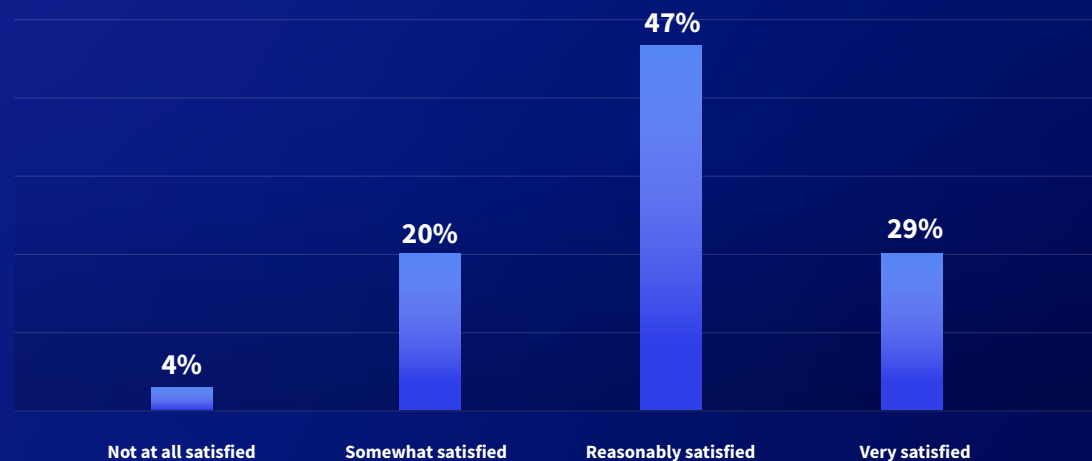
Remember that the more a buyer engages with a brand, the more marketers can learn about them and, in turn, better serve their needs. What keeps buyers engaged varies, so don't just stop at one or two tactics — use several to keep your buyer's attention and keep them coming back for more. For further tips and advice on how to engage buyers online and through events, check out our on-demand webinar, [Driving Engagement Through Virtual Events in the Next Normal](#).

Satisfaction with engagement levels

B2B marketers have expressed satisfaction with their efforts. Three-quarters say they are either “reasonably satisfied” (47%) or “very satisfied” (29%) with the level of engagement that their marketing team can drive. But there is a risk that they may not be meeting buyer expectations given their reported offering. For example, fewer than

one in three use interactive options such as polls and surveys (29%), group chat (27%), or quizzes (20%). Even the most popular options of video and content recommendations are only used by 46% each.

How satisfied are you with the level of engagement that your marketing team can drive?



ON24 Tip: Not all engagement is equal. Make sure you are defining and measuring engagement that matters.

In order to improve buyer engagement effectively, you first need to define what engagement is for your business. After all, opening an email and requesting a meeting are both forms of engagement, but are very different in their likely value. However, the exact definition will ultimately be up to you. As a suggestion, start with your existing lead or account scoring process to identify the actions that matter. To find out how ON24 makes it easy to turn the engagement you have into actionable insights, [check this out](#).



Tech adoption and use

Of course, technology is essential to digital maturity. However, it's not always about how many forms of technology a business has in its stack. It's whether businesses are using the tech they have to find their buyers and use data to help guide them through their journey. This can be simplified

if the technologies are seamlessly integrated and if the technology is easy to use.

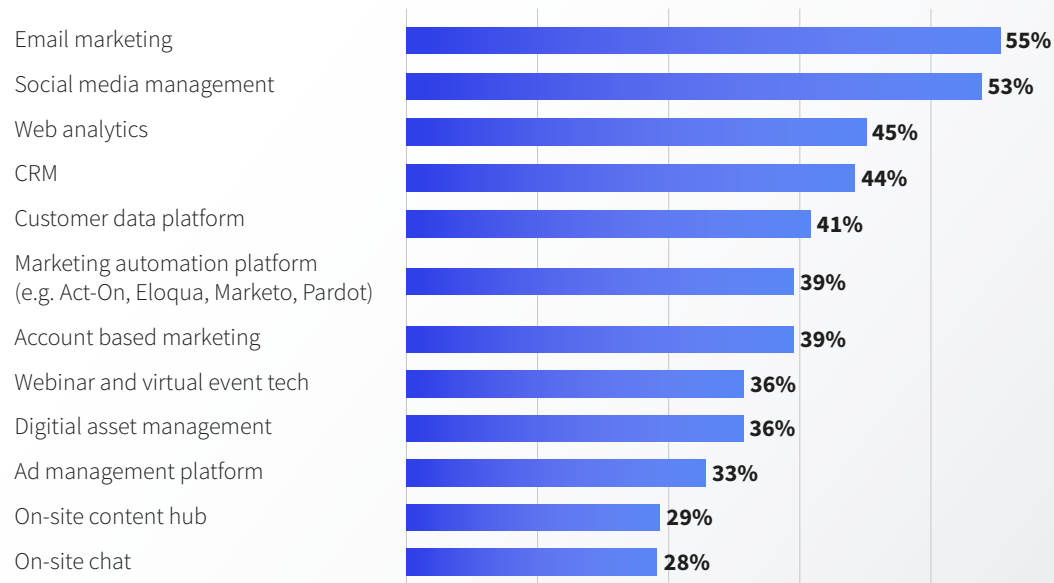
Technologies used

Another indication that European marketers may not be completely in touch with their with the true quality

of their digital experiences is that although many are using technologies for email marketing (55%), social media management (53%), web analytics (45%), and CRM (44%), fewer than two in five (39%) claim to have a marketing automation system within their business.

This is despite marketing automation being a prerequisite for many of today's B2B marketing best practices.

Which of the following technologies do you have in your business?



While, overall, these figures may appear low, they are in line with those published by the European Commission through Eurostat. For example, [its analysis](#) of almost 150,000 businesses in the EU found that only 35% had a CRM as of 2021.

However, this needs to be balanced against the fact that overall, the adoption of numerous technology solutions among respondents is limited. Inevitably, as technical complexity increases, the likelihood of facing integration issues increases.



ON24 Tip: A properly configured CRM and well-integrated marketing automation system should be the tech foundation of your marketing efforts.

High-performing sales teams rely on a properly configured CRM that aligns effectively with their processes. That being said, the buyers that come to your website won't always identify themselves on every single visit, which is why a marketing automation system can be especially valuable. Both of these can be augmented with additional technology, improve your buyer experiences and align both sales and marketing processes. The good news is that many CRMs and marketing automation systems have native integrations with other elements of the technology stack. To find out more about how ON24 integrates with other solutions, check out the details on [ON24 Connect](#).

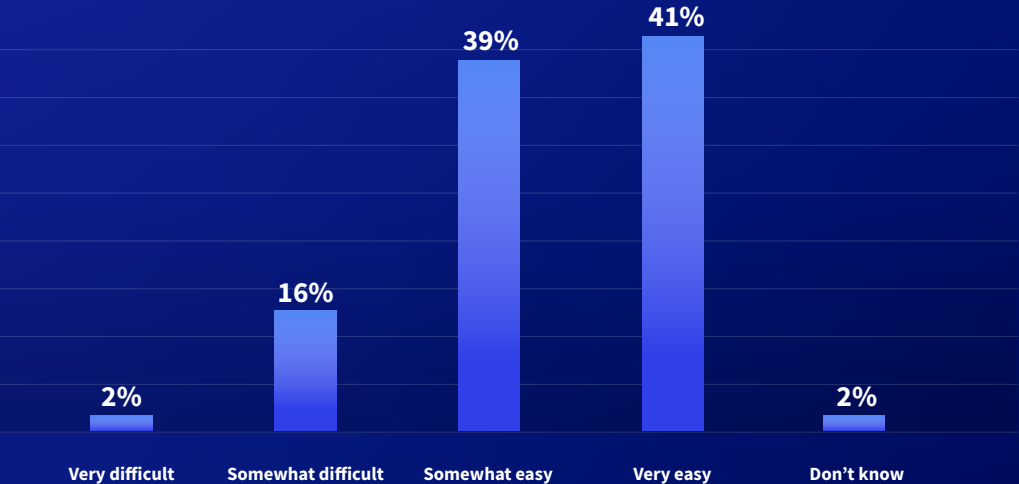


Ease of use

Another positive finding is marketers aren't being held back by overly complicated technologies. Eight in 10 have found it to be either "somewhat easy" (39%) or "very easy" (41%) to use technology to improve

the buyer experience. This highlights the fact that technology vendors have increasingly looked to serve professionals outside of IT and tech as the trend towards low-code solutions increases.

In your opinion, how easy or difficult is it to use technology to improve the buyer experience



ON24 Tip: Speak to your vendors and account managers to get the most out of your tech stack.

Marketers know that they have to keep their skills up to scratch, particularly when it comes to using technology. However, don't feel that you are alone. It's in the interest of the vendors that you work with to get the most out of your investment. Reach out to them for advice or check out any programs, learning and resources they may have on-demand. Customers of ON24 can learn more via [The Center For Marketing Transformation](#) hub.



Experiences and personalisation

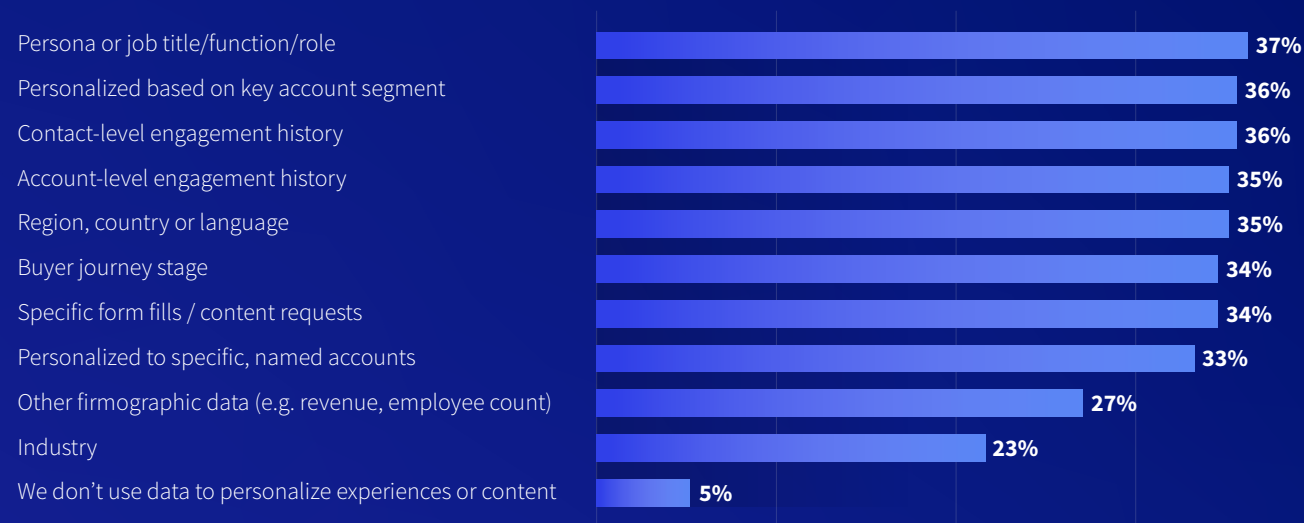
B2Bs have struggled with personalisation, especially in [comparison to their B2C counterparts](#). In fact, earlier research cites [creating personalised campaigns and content that will engage buyers](#) as one of the top challenges for B2B marketing executives. When marketers can personalise experiences not only are buyers more likely to engage, but it can increase the level of trust.

Use of data in personalising digital experiences

Unfortunately, European marketers aren't necessarily up to par when it comes to personalisation. Despite promising maturity levels in strategy and data, it appears that most are failing to translate that into personalising experiences.

Indeed, while more than nine in 10 “strongly agree” (64%) or “somewhat agree” (31%) that a “personalised digital experience helps to break through the noise with our buyers,” only one in three use either contact-level engagement data (36%) or account-level engagement data (35%) to personalise digital experiences and content.

Which of the following types of data do you use to personalised your digital experiences and content?



ON24 Tip: Tap into first- and third-party data to further personalise your digital experiences.

Both first- and third-party data can be put to use in personalisation. Third-party data can be especially effective when you do not have validated first-party data, or when you are targeting key accounts. First-party data is especially valuable when personalising for an individual. As you know more about your buyer, the opportunity for personalisation increases, but not having all the data shouldn't stop you giving the most personalised and relevant experience you can. To dive into this topic more deeply, download our ebook on B2B Trends: [The Data to Find the Accounts, Content and Experiences that Convert.](#)

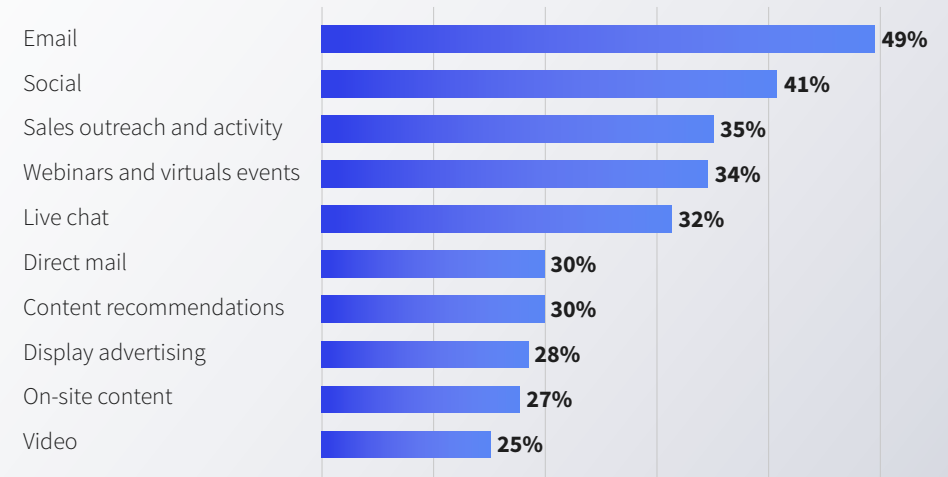


Types of experience that are personalised

Not only are relatively few marketers personalising digital experiences and content using contact or account level engagement data, but not a single digital experience or channel is also personalised by the majority of European marketers. Surprisingly, this includes email. Although personalising email has proven to be effective, just less than half (49%) of respondents are personalising their email experiences at this time.

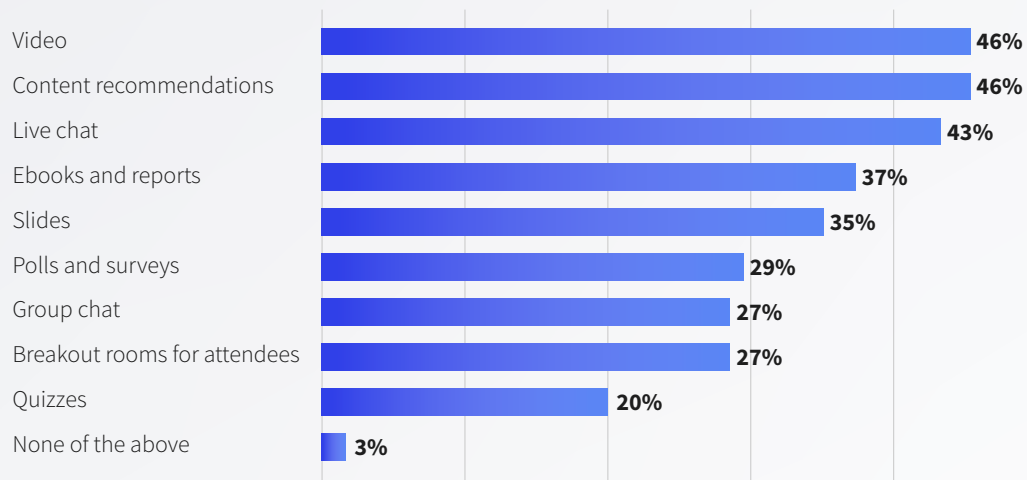
Even fewer marketers report that they are personalizing social channels (41%), sales outreach and activity (35%), webinars and virtual events (34%) and live chat (30%). Furthermore, even though video is offered by some 46% of respondents, only one-quarter (25%) are actually personalising this form of digital content.

Which of the following digital experiences and content do you personalise?



Types of experience that are personalised

In your digital content and experiences, which of the following do you offer to your buyers?



ON24 Tip: Go beyond “Hi [first name]”.
Create more engaging experiences by expanding personalisation efforts beyond email.

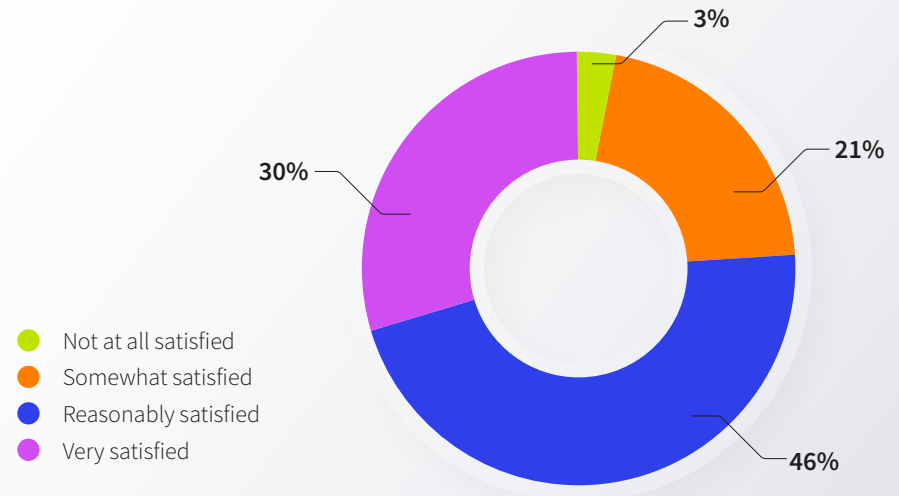
Personalisation shouldn't be a tick box exercise. Aim to embed it across any experience your buyers may come

across, using data that you know about them that aligns to your target audiences. For example, you can suggest resources based on industry, job function or the content they've previously downloaded — as well as what stage of the journey they are at. Check out our on-demand webinar covering [5 Ways to Personalise Your Digital Marketing Experiences](#) for more ideas on how to create personalised, targeted content.

Satisfaction with experience

Even though marketers are not utilising personalisation to its full potential, most believe they are providing a good experience for their buyers. Indeed, when asked to put themselves into the shoes of their buyer and asked to rate their level of satisfaction with the experience their company offers, some three-quarters say they would be reasonably satisfied (46%) or very satisfied (30%) and another one-fifth (21%) would be somewhat satisfied. Very few (3%) claim that they would be not at all satisfied with the experience offered by their company.

If you were a buyer, how satisfied would you be with the experience that your company offers?



ON24 Tip: Don't assume your marketing experiences are perfect. Use real buyers to gain feedback.

Even if you think your marketing is perfect, it's highly unlikely that your buyers feel the same way. To make sure that you are giving them what they need, look to get real feedback from them — ideally when they are already engaging. Using tools such as live on-site chat, surveys or even polls during webinars are quick and effective ways to gauge their thoughts. To find out more, [tune into our on-demand webinar on 'How to Optimise Digital Experiences to Drive Pipeline'](#).

Taking maturity forward

Given the overall advantages that businesses are seeing from being advanced on the digital front, it stands to reason that European B2Bs would be eager to improve in all the areas of digital maturity. Unfortunately, there are some hurdles that need to be overcome in order to improve digital marketing efforts.

Challenges and barriers

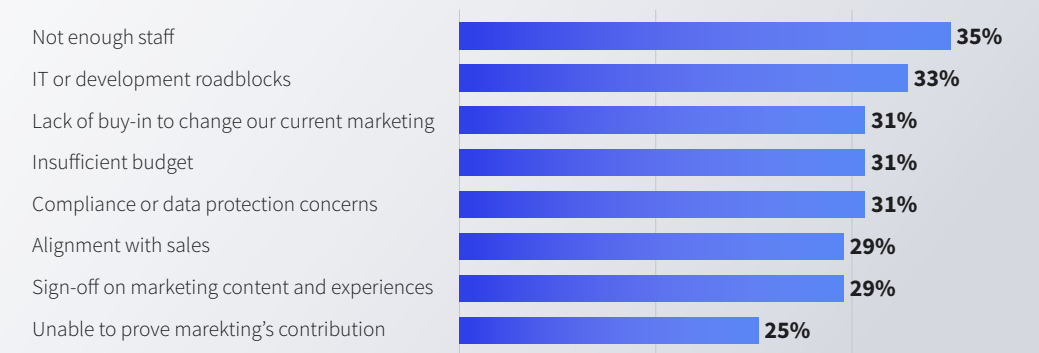
Indeed, the survey asked respondents to identify challenges they are currently experiencing with their marketing efforts. Having the right people to do the job was the most commonly cited challenge, with 43% saying as such. This is compared to those who named lack of alignment between sales and marketing (35%) and data quality issues (33%). Even fewer marketers consider not enough engagement from buyers (28%) as a challenge.

What challenges are you currently facing with your marketing efforts?



There wasn't a noticeable standout response when marketers were asked to identify their top three barriers to improving the marketing performance in their organisation. B2Bs in Europe appear to be plagued by similar issues including not having enough staff (35%), IT or development roadblocks (33%), lack of buy-in to change current marketing (31%), insufficient budget (31%), and compliance or data protection concerns (31%).

What are the top barriers to improving marketing performance in your organization? (Top 3 options)



ON24 Tip: Use data to quantify the cost impact of your current challenges and the net benefit of solving them when building a business case.

Finance directors and budget holders work with numbers. To get them on your side and win the investment you need to address your issues, you should do the same. A great way to do this when making your case is to quantify the net impact of taking action, ideally with an estimated return on investment. To strengthen your case, also make clear any cost associated with inaction.



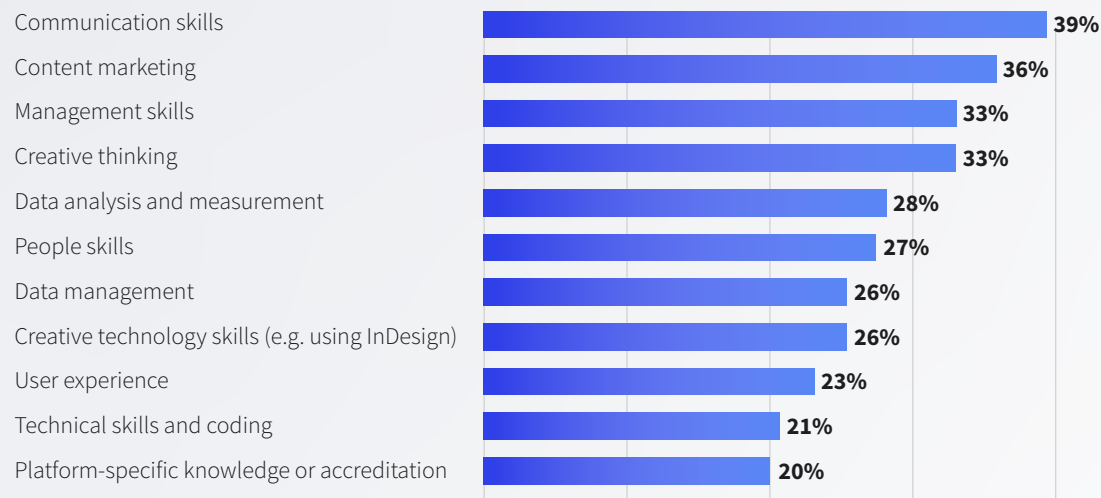
Skills and company support

While a little more than two-fifths of respondents believe that hiring the right people is a challenge to their marketing efforts, how do they feel about their own skills as marketers?

It turns out that nearly all (97%) of the European B2B marketers surveyed are at least somewhat satisfied with their current marketing skills.

Communication skills (39%), content marketing (36%), management skills (33%), and creative thinking are some of the top three cited skills that they think to be most important to their skills. Although data analysis and measurement skills have been considered the top skill set for marketers in the past few years, this skill set ranks further down the list for respondents.

Which of the following skills do you think will be the most important to you in your career? (Top 3 options)



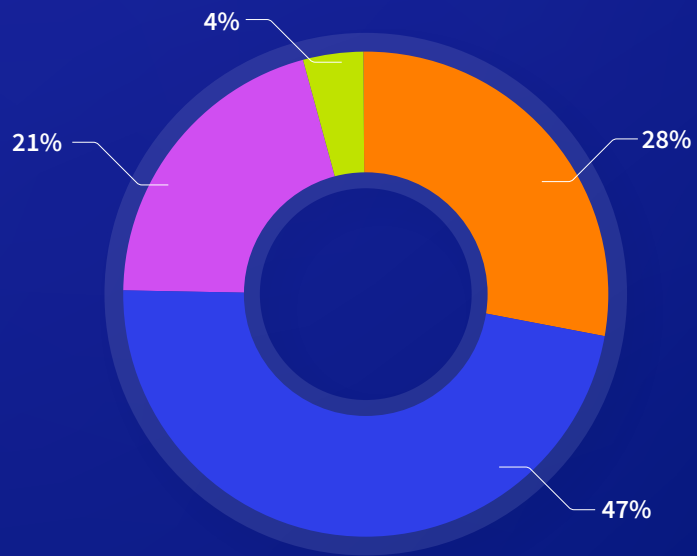
What's more, the majority of respondents feel either "reasonably well-supported" (47%) or "very well-supported" (28%) when it comes to their organisation developing their skills and providing opportunities for growth. This is positive news as it indicates that businesses are supportive of their current employees expanding their digital skills.

ON24 Tip: Make learning a regular habit.

Marketing changes so quickly, making it difficult to stay on top of everything. The best way to stay at the top of your game is to make learning a regular habit. Fortunately, many technology companies provide great resources and learning opportunities for both existing customers and potential buyers. To find out what ON24 has to offer, check out our [upcoming webinars](#) to learn more.

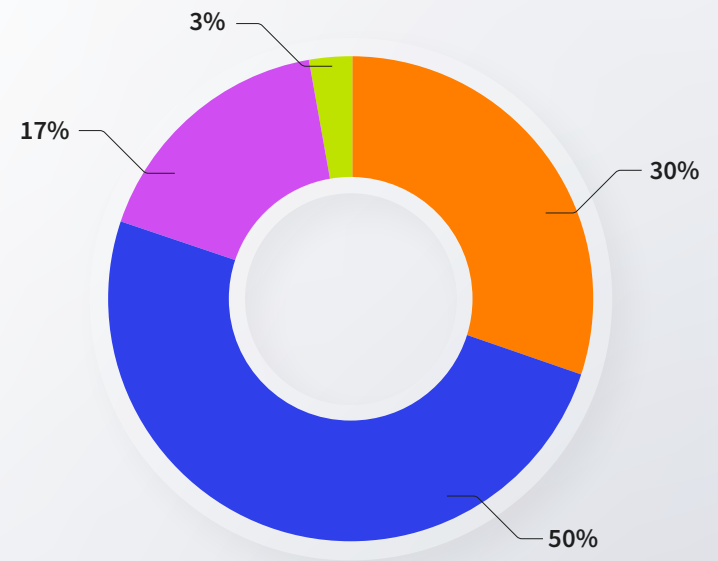


How strongly supported do you feel by your organisation in developing your skills and providing opportunities for growth?



- Very well-supported
- Reasonably well-supported
- Somewhat supported
- Not at all supported

Personally, how satisfied are you in your current marketing skills?



- Very satisfied
- Reasonably satisfied
- Somewhat satisfied
- Not at all satisfied



Conclusion and recommendations

The findings from the survey reveals that although European B2B organisations are excelling in some areas of digital maturity, they still have a ways to go in others. Marketers appear to have a handle on digital strategy and using engagement and performance data. On the other hand, there remains some room for improvement in the areas of driving engagement, tech adoptions and experiences and personalisation.

Deficiencies in these three areas have left overall digital maturity ratings somewhat wanting. Only a very few respondents achieved an “Advanced” maturity rating, with the majority within the “Proficient” or “Intermediate” levels.

With evidence pointing to a strong connection between a business’ digital maturity rating and businesses performance, it’s sensible and crucial for organisations to improve their digital maturity.

Here are a some recommendations that can help that along:

Be honest with your own level of digital maturity — while remembering that every step in improvement will deliver results.

- Ensure your strategy covers exactly how you will engage buyers and improve the experience to drive results.
- Take advantage of contact-level or account-level engagement data to personalise digital experiences and content.
- Expand the use of techniques and tactics to drive action and engage buyers.

- Utilise more interactive experiences such as polls, surveyes, group chat, and quizzes.
- Increase personalisation across digital channels.
- Ensure that marketing systems are seamlessly integrated.

Improving your digital maturity checklist

Use the below list of competencies and tips to improve your digital maturity.

	Advanced Maturity Competencies	Top Tips
Strategy, Process and People	<ul style="list-style-type: none"> • Strategy aligns with both marketing and sales goals • Go-to-market plan is in place based on key segments and target accounts. Strategy is revised throughout the year using engagement and performance data • Goals are always set for tactics or digital experiences and align to overall marketing, sales and broader business targets • Marketing processes are thoroughly documented, used and shared — and reviewed frequently for optimization and improvement opportunities 	<p>Gain the input of other key stakeholders (e.g. sales) when setting or revising marketing goals</p> <p>Start small when documenting your marketing processes and add to them over time</p> <p>Use buyer journey stages to help plan, create and personalize your marketing</p> <p>Encourage your team to make learning a habit</p>
Data and Measurement	<ul style="list-style-type: none"> • Centralized and standardized data from all our systems • Has a single view of each account and contact • Uses data and single view to drive processes and actions • Visibility of total marketing contribution to overall pipeline with value attributed to specific marketing activities is excellent • Engagement data is collected from multiple touchpoints and aligned by buyer journey stage • Engagement data is made available to sales and other teams • Data informs content and overall themes • Data drives how interactivity and conversions are driven • Strategy is improved with the use of data • Confidence in the quality of marketing data is very high 	<p>Remember you don't need to centralize all of your data</p> <p>Take small steps when improving visibility of marketing performance</p> <p>Harness your company's first-party data and put it to good use</p> <p>Use data to create multichannel experiences throughout the buyer's journey</p> <p>Be cautious and honest with your organization's data quality.</p> <p>Use data whenever you need to make a business case for changes or improvements</p>



Improving your digital maturity checklist

Use the below list of competencies and tips to improve your digital maturity.

	Advanced Maturity Competencies	Top Tips
Drive Action and Engagement	<ul style="list-style-type: none"> • Offers multiple and personalized CTAs aligned to the buyer's journey across all digital experiences • Drives action and engagement using several different techniques and tactics. Including webinars, video, live chat and chat bots 	<p>Create CTAs that will inspire buyers to move forward in their buying journey</p> <p>Utilize an array of tactics and techniques to keep audiences engaged with your brand</p> <p>Make sure you are defining and measuring engagement effectively</p>
Tech Adoption and Use	<ul style="list-style-type: none"> • Takes advantage of multiple integrated marketing technologies, including CRM and marketing automation platforms • Technology is easy to use in order to improve the buyer experience 	<p>A properly configured CRM and well-integrated marketing automation system should be the tech foundation of your marketing efforts</p> <p>Speak to your tech vendors and account managers to get the most out of your solutions</p>
Experiences and Personalisation	<ul style="list-style-type: none"> • Digital experiences and content are personalized using various types of data, including contact-level and account-level engagement history • Personalisation is used across multiple channels such as email, social media, live chat, webinars and direct mail 	<p>Tap into first- and third-party data in order to personalize digital experiences in the most effective way</p> <p>Create more engaging experiences by expanding personalization efforts beyond email</p> <p>Use real buyers to gain feedback and improve marketing experiences</p>



Appendix

Maturity scores for questions

The questions factoring into the maturity assessment and individual scores are below.

Section	Question	Max score
Strategy, Process and People	Which of the following best describes your organization's marketing strategy?	8
	How does your marketing team typically set goals for your tactics and digital experiences?	8
	Which statement best describes your use of defined processes in marketing?	8
	Total for strategy, process and people	24
Data and Measurement	Which of the following best describes how your organization collects marketing data?	8
	How much visibility do you have in terms of marketing's contribution to revenue goals?	8
	To what extent are you able to collect engagement and action data to qualify and understand your buyers?	8
	How does your marketing team use data to improve its content and digital experiences?	8
	Total for data and measurement	32
Driving Action and Engagement	Which best describes how your marketing team incorporates calls-to-action and other conversion touchpoints?	8
	Which of the following techniques and tactics do you currently use to drive action and engagement?	10
	Total for driving action and engagement	18



Appendix

Maturity scores for questions

The questions factoring into the maturity assessment and individual scores are below.

Section	Question	Max score
Tech Adoption and Use	Which of the following best describes your organization's marketing strategy?	12
	How does your marketing team typically set goals for your tactics and digital experiences?	8
	Total for tech adoption and use	20
Experiences and Personalization	Which of the following types of data do you use to personalize your digital experiences and content?	10
	Which of the following digital experiences and content do you personalize?	10
	In your digital content and experiences, which of the following do you offer to your buyers?	10
	Total for experiences and personalization	30
Overall Digital Maturity Total		124

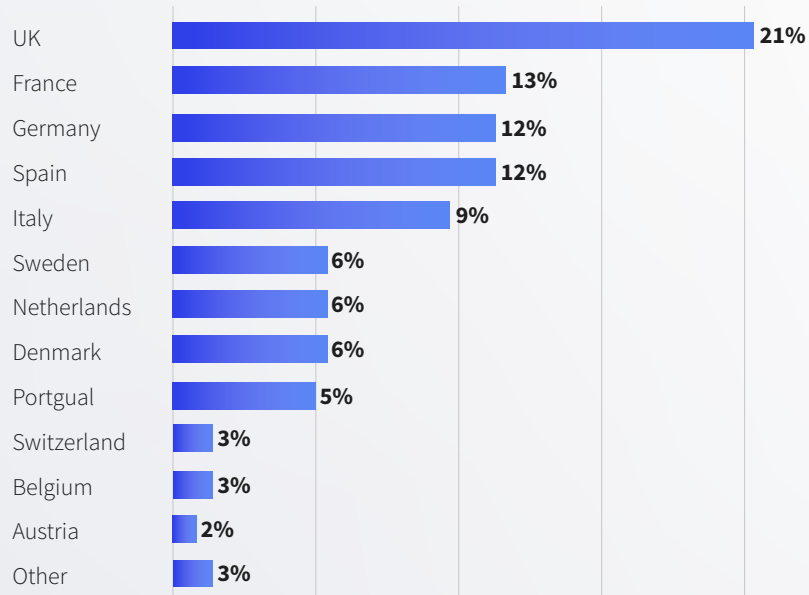
Maturity Rating	Total Maturity Score
Advanced	100 to 124
Proficient	75 to 99
Intermediate	51 to 74
Beginner	26 to 50
Novice	0 to 25



Appendix

Respondent profiles: Country

In which country are you based?

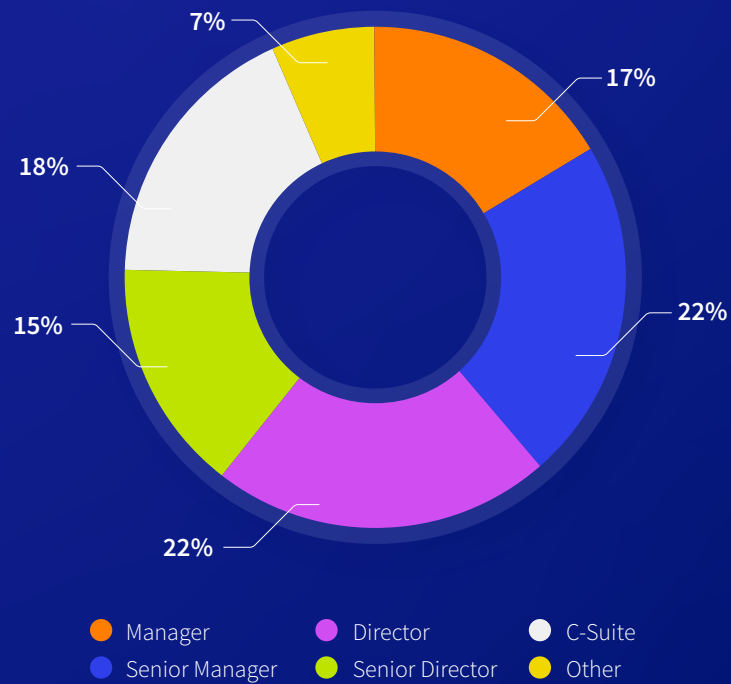


Appendix

Respondent profiles:

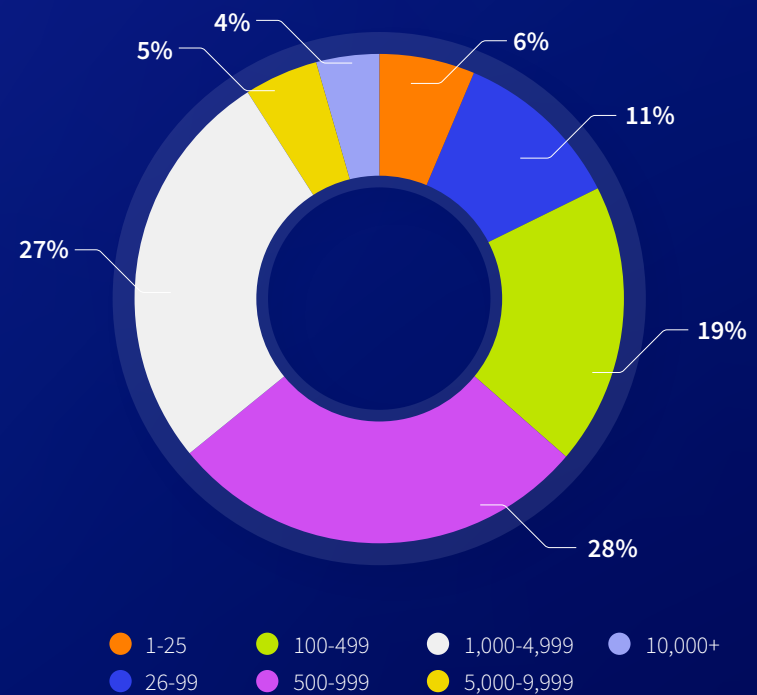
Responsibility level

Which of the following best reflects the level of responsibility you have in your current role?



Company size

Which reflects your company's size (employees)



Methodology

To understand the level of digital maturity across Europe, Market2Marketers and ON24 conducted an online survey in June and July 2022. We used a total of 863 responses for this analysis.

All respondents worked for B2B organisations within a marketing or a marketing-related role. Panel respondents were sourced through Dynata and its providers from the UK, France, Germany, Spain, Belgium, Austria, Switzerland, the Netherlands, Denmark, Sweden, Portugal and Italy. To ensure understanding and achieve high completion rates, the survey was translated

from English into French, German, Dutch, Spanish, Portuguese, Italian, Danish, and Swedish. The survey was offered in the local languages of each country.

Respondents were placed in one of five maturity categories based on their answers to the questions. For comparability across markets, only respondents that answered every maturity-related question were assigned a performance rating. Question scores and respondent profiles are contained in the Appendix. Some figures may not add up to 100% due to rounding.

This report highlights the practices and perceptions of B2B marketers across Europe, providing an insight into how they are reaching and engaging their buyers online.