Marketers Boost Martech Efficacy Through Disciplined Planning and Collaboration With IT

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Marketing technology leaders are strengthening collaboration efforts with IT as they plan, implement and optimize martech investments. This survey highlights ongoing struggles with marketing technology utilization, as well as the importance of structured planning to achieving martech effectiveness.

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Overview

Key findings

- The often chilly relationship between marketing and IT has warmed as the two teams collaborate to plan, integrate and operate marketing technologies.

- Marketing organizations with higher martech roadmap maturity — evidenced by a formalized roadmap or an agile planning approach — report greater marketing technology effectiveness.

- Marketing technology (martech) teams increasingly take a “best-of-breed” approach to selecting new technologies. Fifty-seven percent prefer to build their stack through various solutions from different providers, versus 29% who prefer an “integrated suite” approach.

- Marketing teams leave martech’s potential untapped, imperiling both their credibility and impact. This year, marketers report using only 58% of their martech stack’s full capabilities. Marketing teams that utilize less of their stack’s capabilities report a lower level of martech effectiveness.

- Despite a heavy appetite for technologies that enable personalization, marketing technology teams are underinvested in tools such as consent and preference management platforms, which enable enterprise collection of customer data as well as self-service control for consumers.

Recommendations

To successfully manage your marketing technology:

- Continue to seek opportunities to collaborate with IT leaders. Focus on applying each group’s complementary strengths to accomplish customer-centric objectives.

- Audit your marketing technology ecosystem to assess and improve utilization of modules within existing technologies.

- Maximize the effectiveness of your marketing technology stack by using a best-of-breed strategy, which can lift capability utilization and accelerate business results.

- Bolster your best-of-breed or integrated suite preference with a formal roadmap or agile planning approach to secure resources, align teams and improve impact.

- Use Gartner’s Marketing Maturity Assessment tool to gauge your marketing maturity and identify the steps needed to advance to the next maturity level. Pinpoint technologies that support these capabilities to inform martech planning.

- Embrace a customer-centric approach to data privacy as a core brand value. Craft data ethics policies and utilize appropriate technologies such as consent and preference management platforms to enforce business rules, reduce risk and enable data transparency.
Survey Objective

The 2019 Gartner Marketing Technology Survey of 418 marketing leaders responsible for marketing technology decision making is designed to reveal how marketers are investing in, deploying and getting value out of technology. This is a repeat survey. The survey examined:

- The composition of the teams responsible for managing marketing technology in the enterprise, evaluation and selection practices
- Best practices for marketing technology effectiveness
- Key business processes for maximizing the utilization of marketing technology capabilities
- Priorities related to emerging technologies and trends.

In instances where this research makes year-over-year comparisons, we exclude responses from marketers in Germany and France, since prior surveys did not poll marketers in those two countries.

Data Insights

The war is over: Marketing technology leaders find collaborative partners in IT

The relationship between marketing and IT has long been strained by poor communication and cultural divides. Most marketers have historically felt that their IT teams do not provide the speed and agility required to keep pace with consumers in a digital world. IT executives, on the other hand, complain that marketers often suffer from “shiny object syndrome” when it comes to emerging technologies (see “Building an Effective IT-Marketing Partnership”).

Findings from Gartner’s CMO Spend Survey 2019-2020 suggest a reversal in this historically antagonistic relationship. Marketing leaders cited IT as a major detractor in Gartner’s CMO Spend Survey 2017, but CMOs now say their IT organization is one of marketing’s top supporters.

This year’s Marketing Technology Survey tells a similar story. Respondents mark significant levels of collaboration with IT as they plan for and implement new product adoptions to execute on core marketing functions. When asked how big of an impediment collaborating with IT is to achieving business goals, 53% of respondents cite collaborating with IT as “no impediment” at all. Only 16% cite IT collaboration as a major impediment.
With reduced impediments to success, marketers should be able to realize business benefits. Our survey shows that teams with better collaboration are also able to achieve greater effectiveness. Of respondents who stated that collaborating with IT is “no impediment,” 39% said their martech stack is very or completely effective, compared with just 25% when IT was characterized as a “major impediment” and 26% when IT collaboration represented a “minor impediment.”

**Only 16% of marketers cite IT collaboration as a major impediment to achieving business goals.**

When it comes to managing key martech-related activities, 42% of respondents in this year’s Marketing Technology Survey report taking the reins when creating their organization’s marketing technology roadmap, with close guidance from their IT counterparts. When configuring and deploying new marketing technologies, 29% of respondents say that IT is most likely to take charge, with close guidance from the marketing organization. Similarly, IT is most likely to lead in integrating disparate marketing technologies and databases under marketing’s purview (see Figure 1).
Figure 1. The War Is Over: Marketing-IT Relationship Warms to a New High of Collaboration

Groups That Control Marketing Technology Activities

- **Marketer Control**
  - Management of the Current Suite of Marketing Technology: 32%
  - Integration of Disparate Marketing Technologies and Databases: 30%
  - Configuration and Deployment of New Marketing Technology: 20%
  - Evaluation, Selection and Purchasing of New Marketing Technology: 28%
  - Acquisition of Budget for Marketing Technology: 40%
  - Management of the Marketing Technology Roadmap: 39%
  - Creation of the Marketing Technology Roadmap: 30%

- **IT Control**
  - Management of the Current Suite of Marketing Technology: 44%
  - Integration of Disparate Marketing Technologies and Databases: 32%
  - Configuration and Deployment of New Marketing Technology: 29%
  - Evaluation, Selection and Purchasing of New Marketing Technology: 43%
  - Acquisition of Budget for Marketing Technology: 37%
  - Management of the Marketing Technology Roadmap: 36%
  - Creation of the Marketing Technology Roadmap: 42%

- **Collaboration Zone**
  - Management of the Current Suite of Marketing Technology: 20%
  - Integration of Disparate Marketing Technologies and Databases: 6%
  - Configuration and Deployment of New Marketing Technology: 8%
  - Evaluation, Selection and Purchasing of New Marketing Technology: 3%
  - Acquisition of Budget for Marketing Technology: 3%
  - Management of the Marketing Technology Roadmap: 5%
  - Creation of the Marketing Technology Roadmap: 2%

- **Managed by an External Services Partner**
  - Management of the Current Suite of Marketing Technology: 4%
  - Integration of Disparate Marketing Technologies and Databases: 1%
  - Configuration and Deployment of New Marketing Technology: 1%
  - Evaluation, Selection and Purchasing of New Marketing Technology: 1%
  - Acquisition of Budget for Marketing Technology: 1%
  - Management of the Marketing Technology Roadmap: 2%
  - Creation of the Marketing Technology Roadmap: 2%

**n = 418**

Q. Which group controls each of the following marketing technology activities?

Source: 2019 Gartner Marketing Technology Survey

Note: Total does not equal 100% due to rounding.
Martech roadmap development and deployment relies on inherent strengths in both marketing and IT. Because marketing best understands the workflow and needs of the marketing team, they are able to assess the extent to which individual technologies can overcome inefficiencies and enable process improvements. Since IT best understands the existing technology frameworks and interdependencies, they are able to recognize and overcome integration, scaling, and other implementation and operational challenges. Irrespective of which part of the organization leads roadmap development, key marketing technology responsibilities should be mapped to IT and marketing’s existing strengths. With this approach, martech teams will utilize the part of the organization best equipped to address each area.

**Recommendations:**

For organizations where marketing controls the entire process of selection, deployment and integration of technology, assess the impact of greater collaboration with IT counterparts. This would free up scarce time and enable some martech teams to spend more time on other projects or learn new skills.

- When collaboration is still a challenge, work to find common ground with IT leaders by focusing on delivering mutually impactful outcomes. Focus on applying each group’s complementary strengths to accomplish customer-centric objectives. For example, take the lead on developing a strategy and securing budget, and let IT lead on configuration, deployment and integration.
Marketing Organizations With Sophisticated Martech Roadmapping Approaches Report Greater Martech Effectiveness

Marketing technology roadmaps are essential for corralling and connecting a vast ecosystem of divergent solutions to execute on a growing number of marketing priorities (see “Build an Adaptable Marketing Technology Roadmap”). In order to link technology, business needs and marketing workflows into a shared approach, marketing technology leaders use roadmaps to:

• Communicate the capabilities supported by martech within the marketing organization and throughout the rest of the business

• Catalyze the gathering of businesses and user requirements to support use-case development

• Prioritize requests for acquiring new technologies or building out new capabilities based on their ability to support defined business objectives

• Manage martech development and deployment against short-term goals and long-term business outcomes

• Highlight and adapt to emerging trends, potential risks and other disruptors from competitors as well as the broader market

This year’s Marketing Technology Survey found that a majority of martech teams are investing in creating and managing their roadmap; only 7% of respondents report an ad hoc approach to their martech planning (see Figure 2).

Figure 2. A Majority of Martech Leaders Bring Rigor and Discipline to Martech Planning
Martech leaders who report having a formalized planning approach (33%) or an agile planning approach (22%) report much higher levels of martech effectiveness than those who follow an ad hoc or best-effort approach (see Figure 3).

Marketing technology teams are investing substantial resources into creating and managing their martech roadmap.

Figure 3. Those With a More Mature Roadmap Approach Say Their Martech Is More Effective
**Martech Leaders Don’t Plan Five Years Out, Let Alone Two**

Though most marketing technology leaders maintain a martech roadmap, many remain grounded in reality. Martech leaders know that technology and consumer behaviors are in constant flux, and so planning too far into the future isn’t realistic (see “Consumers and Culture Primer for 2019”). Of the respondents who report maintaining some form of a martech roadmap, 78% say their roadmaps don’t extend beyond 18 months.

With dynamic changes in offerings and capabilities from incumbent marketing technology vendors, along with new startups disrupting long-established marketing practices, martech roadmaps must be tempered by periodic reviews to accommodate new technology and market conditions. Drilling deeper into the ways in which teams use and manage their martech roadmaps, a full 65% of respondents say they update their martech roadmaps at least once a quarter (see Figure 4). This accounts for the speed with which both marketing technology and consumer behavior evolve as the pace of digital business continues to pick up (see “Predicts 2019: Marketing Seeks a New Equilibrium”). Only 12% report updating their martech roadmaps on an annual or ad hoc basis.

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**Figure 4. Two-Thirds of Martech Leaders Refresh Their Roadmap at Least Four Times Per Year**

<table>
<thead>
<tr>
<th>Frequency of Technology Roadmap Review/Update/Publish</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly</td>
<td>14%</td>
</tr>
<tr>
<td>Quarterly</td>
<td>51%</td>
</tr>
<tr>
<td>Semiannually</td>
<td>24%</td>
</tr>
<tr>
<td>Annually</td>
<td>10%</td>
</tr>
<tr>
<td>Ad Hoc</td>
<td>2%</td>
</tr>
<tr>
<td>Never</td>
<td>0%</td>
</tr>
</tbody>
</table>

65% update their martech roadmaps at least once a quarter.

n = 389 (Respondents who have planned for marketing technology, excluding don’t know)

Q: How often is the technology roadmap reviewed, updated and published to the team?

Source: 2019 Gartner Marketing Technology Survey

Note: Total does not equal 100% due to rounding.
Though most marketers report updating their roadmaps each quarter, 36% say the most recent version of their roadmap was published within the last three months. The highest proportion of marketers surveyed (50%) report having published the most recent version of their martech roadmap within the last six months. The gap between when respondents review and republish their roadmap may reflect challenges in acquiring vendor data, identifying the impact of new business realities, aligning capabilities of new marketing team members or taking advantage of a new customer insight. Despite these potential challenges, martech leaders appear to be taking that role seriously, continuing to make progress with using the roadmap as a tool.

**Marketers With Agile Martech Roadmaps Maintain the Longest Planning Horizons**

To gain the benefit of longer-term planning while accommodating the need for agility in the shorter term — such as accounting for innovative technologies to mature or for time-intensive projects to come to fruition — marketing technology teams should adopt an agile martech planning approach (see “An Introduction to Agile Marketing”).

This year’s Marketing Technology Survey found that teams taking an agile approach to selecting and planning their martech solutions have the longest planning horizons. Thirty percent of respondents with an agile approach maintain roadmaps that stretched beyond 19 months, compared to 16% of teams that follow a best-effort approach, and 24% of teams with a formalized roadmap (see Figure 5).

**Figure 5. Organizations With an Agile Planning Approach to Martech Roadmaps Plan Farthest Out**

<table>
<thead>
<tr>
<th>Roadmap Maturity</th>
<th>Best-Effort (n = 159)</th>
<th>Formalized (n = 137)</th>
<th>Agile Planning (n = 92)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beyond 24 Months</td>
<td>11%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Between 19 and 24 Months</td>
<td>42%</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Between 13 and 18 Months</td>
<td>42%</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>Less Than 12 Months</td>
<td>0%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

n = 388 (Respondents who have planned for marketing technology, excluding don’t know)
Q: How would you best characterize your company’s approach to a marketing technology roadmap?
Q: How far into the future does your marketing technology roadmap/plan extend?
Source: 2019 Gartner Marketing Technology Survey
Respondents with an agile martech planning approach have also secured funding for 35% of their planned marketing technology deployments, compared to 31% for those with a “best-effort” approach to martech planning. Across the planned deployments reported by respondents across all technologies taking place within the next two years, marketing technology teams have secured funding for 34% of planned deployments.

Respondents with an agile martech roadmap planned for a smaller number of deployments on average than those without agile planning methods. This suggests that greater martech agility provides marketers with greater flexibility while allowing them to plan for the future and support budget requests (see “Clorox’s Test and Learn Approach to Building a Martech Roadmap”).

**Recommendations:**

- Develop a martech roadmap by assessing your organization’s current marketing technology assets, strategic business objectives and current and future capability needs. (See “Toolkit: How to Audit Your Marketing Technology Ecosystem.”)

- Though planning too far into the future may result in wasted efforts, use an agile approach to make new plans while maintaining flexibility to deal with new conditions or unanticipated changes beyond the next 18 months. Use the martech roadmap to secure future budgetary commitments and other supporting resources, as well as provide a clear plan for implementing the right technologies that drive the greatest business impact (see “Use Gartner’s Marketing Strategy Framework to Build Accountable, Actionable Strategic Plans”).
Marketing Technology Leaders Prefer a “Best-of-Breed” Approach to Martech Selection

In characterizing how they go about selecting marketing technology, a majority of marketers (57%) say that they prefer a best-of-breed approach, in which they source the “best” solution to solving challenges or advancing marketing’s ability, irrespective of the vendor. Only 29% state they prefer an integrated suite approach, in which the organization relies primarily on a single vendor for multiple interconnected capabilities to satisfy marketing’s needs (see Figure 6).

Figure 6: Marketing Technology Preferences Shift Toward a Best-of-Breed Approach

Marketing technology leaders in North America and the U.K. show a marked shift toward this best-of-breed approach (see Note 1). In 2018’s survey, 50% of respondents preferred this approach while 38% opted for the integrated suite mode of solution. This year, 56% of respondents in those same geographies state that their strategy is best-of-breed, while only 31% choose an integrated suite.
Interestingly, marketers in North America and the U.K. who prefer a best-of-breed approach report utilizing more of their martech stack on average (60%) than those who prefer an integrated suite approach (53%). This suggests that marketers are getting better at minimizing waste from unused or abandoned martech, perhaps due to marketing’s closer collaboration with IT. Beyond collaboration, successful marketing technology leaders are proactively using their marketing technology roadmaps as the central artifact of a process by which to refine and optimize their martech stack (see “Upgrade Your Marketing Technology Ecosystem”).

While avoiding waste is important, achieving business objectives is critical. Globally, those following a best-of-breed approach also report higher levels of martech stack effectiveness (45%) over those who follow an integrated approach (28%).

### Table 1. North American and U.K. Respondents Increasingly Favor a Best-in-Breed Approach

<table>
<thead>
<tr>
<th></th>
<th>2018 Survey</th>
<th>2018 Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer Best-of-Breed Approach</td>
<td>50%</td>
<td>56%</td>
</tr>
<tr>
<td>Prefer Integrated Suite Approach</td>
<td>38%</td>
<td>31%</td>
</tr>
</tbody>
</table>

The analysis for this table reflects North American/U.K. respondents only because France and Germany were not included in the 2018 survey.

Source: Gartner (2019)
Recommendations:

• Maximize effectiveness of your marketing technology stack by using a best-of-breed strategy that capitalizes on the strengths of multiple solutions. Ensure that your organization’s use of various solutions from multiple vendors remains aligned with overall business goals. Do this by formalizing a technology sourcing, procurement and vendor management discipline within your organization (see “Formalize Marketing Technology Sourcing, Procurement and Vendor Management to Ensure Business Value”).

• When adopting solutions from integrated suite vendors, use a marketing technology audit to assess and improve utilization of additional modules within integrated suites, and eliminate point solutions when possible (see “Toolkit: How to Audit Your Marketing Technology Ecosystem”).

• When taking a best-of-breed approach, don’t assume that integrated suite vendors will fail to address their product deficiencies, or that point solution vendors will deliver promised improvements on schedule. Document and discuss gaps with existing and prospective vendors, and request insight into plans to develop new features or integrations that resolve these gaps (see “How to Manage Marketing Technology Vendor Transitions”).

Marketers who prefer a best-of-breed approach utilize more of their martech stack on average than those who prefer an integrated suite approach.

Marketers’ disappointment in marketing cloud solutions’ overall capabilities, as expressed during Gartner client inquiries, likely accounts for this shift in preference to best-of-breed solutions. Ongoing shifts in the overall vendor landscape may also underlie the change. Since last year’s survey, merger and acquisition activity increased consolidation in the range of providers.
Higher-Ranking Martech Leaders Capture a Greater Share of Budgets

Gartner’s CMO Spend Survey 2019-2020 found marketing technology budgets dropping three percentage points year over year, settling at 26% of the overall marketing expense budget.

Regardless of this drop in martech investments, marketing technology teams may be improving their financial literacy and effectively advocating for larger budgets. Respondents to our 2019 Marketing Technology Survey report FY18 martech spending at an average of $11.2 million compared to a 2018 mean of $7.5 million (see Note 2).

According to the Marketing Technology Survey, technology budgets increased as the highest-ranking martech leader moved closer to C-suite status (see Figure 7).

Figure 7. More-Senior Martech Leaders Control Larger Martech Budgets

2018 Spending on Martech by Level of Highest Ranking Martech Team Member

<table>
<thead>
<tr>
<th>Level of Highest Ranking Martech Team Member</th>
<th>Spending in Millions US$</th>
</tr>
</thead>
<tbody>
<tr>
<td>C-Level</td>
<td>$12.0</td>
</tr>
<tr>
<td>One Level Below</td>
<td>$10.6</td>
</tr>
<tr>
<td>Two or More Levels Below</td>
<td>$9.9</td>
</tr>
</tbody>
</table>

n = 317 North American/U.K. respondents, excluding don’t know
Q: What level is the highest-ranking marketing technology professional within your company?
Q: What range in US$ most accurately represents your company’s spending on marketing technology for the fiscal year 2018?
Source: 2019 Gartner Marketing Technology Survey
Securing greater budget commitments from marketing is also easier when the marketing technology team reports into the CMO, as opposed to the CIO or other functional areas such as finance or operations.

Marketing technology teams with a formalized roadmap of current and planned marketing technologies secure the highest budgets ($11.9 million), on average. This indicates that these teams have been able to show where their marketing technology investments will be deployed, and thus can better articulate martech’s expected impact on achieving business results.

**Agile Marketing Teams Make Better Use of Martech Investments**

As of late 2019, tougher macroeconomic economic conditions seem likely — but with uncertain timing. Keeping your footing during economic downturns and other macro- and microenvironmental difficulties requires more than just assets and strong capabilities; dealing with such uncertainties demands agility. Marketing technology teams won’t be relieved of their burdens to drive efficient and effective business impact from the martech stack when times become tougher. Such demands may even intensify. Marketing technology leaders should be ready to participate in identifying cost optimization opportunities, including cost reduction, growth drivers and strategic investments (see “Winning in the Turns: A CMO Action Guide — How Leading Brands Outperform in Uncertain Times”).

Marketing teams with the greatest martech maturity demonstrate this in terms of financial management and discipline; greater sophistication does not necessarily translate directly into greater shares of marketing budgets. Martech teams with an agile planning approach report lower budget levels ($10.5 million) compared to those with a formal marketing technology roadmap ($11.9 million).

This suggests that martech teams with an agile planning approach have been able to successfully trim duplicative technologies out of their martech stack, while also maintaining greater agility and confidence in their ability to secure funding when needed. This is in line with the findings that agile planners have the fewest number of planned technology deployments per respondent.
Martech Leader Seniority Affects Martech Selection Approach, Roadmap Management and More

Seniority status of martech leadership affects more than just martech budget allocations. Our survey respondents report positive growth in marketing technology’s visibility within the organization. This reflects the findings from Gartner’s Marketing Organizational Survey 2019, where respondents report martech capabilities as among the most critical for successfully delivering against their objectives.

As marketers continue to respond to the mandates for key business objectives set by executive teams, a greater share of martech leaders now count on an SVP or EVP level member of the team compared to 2018. Companies that vest marketing technology leadership in the C-suite (primarily in the CMO) are staunchly in the best-of-breed camp for martech selection. Sixty-four percent say they lean to or strongly prefer a best-of-breed approach, versus only 47% of firms with a martech leader in a subordinate position. Marketing technologists with less seniority may find that an integrated suite is easier when it comes to securing budget. A more senior executive might be confident of support for meeting the sourcing and procurement tasks associated with a greater diversity of vendors. While both share similar time horizons for martech roadmaps, teams with C-suite martech leadership review, update and publish their roadmap more frequently:

- 69% do so quarterly, versus only 58% for teams with subordinate martech leadership.

Respondents with C-suite leadership also assess their overall martech effectiveness more highly:

- 42% rate their stack as effective in contrast to only 33% for teams with a martech leader not in the C-suite.

Respondents with C-suite leadership were also more optimistic about their organization’s martech effectiveness improving within the next 18 months:

- 62% felt their company’s stack would improve, versus 37% for respondents with teams that have a martech leader in a subordinate position.

Finally, teams with C-suite martech leadership reported higher martech utilization:

- 19% say that their company is utilizing at least 75% of the capabilities of their martech stack, versus only 9% of teams without C-suite martech leadership.
Recommendations:

- Strive to acquire the resources necessary to accomplish business goals, but not at the expense of agility. Balance depth of capabilities with your martech investment’s flexibility to grow and evolve; rationalize and maximize the solutions you already have before bringing new tools into the fold. (See “3 Steps to Maximize Existing Marketing Technology Investments.”)

- Use your martech roadmap as an advocacy tool, and use compelling visuals to tell the story, particularly during discussions with more senior executives. Include time-bound commitments (such as quarterly milestones for sourcing, deployment or utilization targets) to help the C-suite get behind your vision. (See “Toolkit: Visualize and Communicate Your Marketing Technology Stack.”)

Martech Stacks Remain Largely Underutilized, Impacting Effectiveness

Marketing leaders in North America and the U.K. did not make progress in the utilization of their martech stack’s capabilities. Last year, marketers in these geographies reported using an average of 61% of their martech stack’s full capabilities. This year, North American and U.K. marketers report using only 58% of their martech stack’s potential (see Note 1).

The CMO Spend Survey 2018-2019 noted a surge in marketing technology budget as a share of overall marketing expense, which may indicate that marketers acquired some new capabilities that have yet to be realized. However, as Gartner research shows, translating marketing technology into business effectiveness is correlated with marketing technology utilization.
Martech utilization correlates with effectiveness

Regardless of utilization, marketers in all countries surveyed remain largely optimistic regarding current and future martech effectiveness. According to the Marketing Technology Survey, 89% of marketers feel their martech stack is effective at meeting business objectives (see Figure 8). Ninety-five percent of respondents expect their martech stack to improve in effectiveness over the next 18 months. When asked how marketers assess the success of their martech stack, respondents’ most-frequently-cited top metrics are: the ROI of total marketing technology budget, the ROI of individual marketing technologies and top-line revenue growth.

Figure 8. Nine in 10 Martech Leaders Report That Their Martech Stack Is Effective

Perceived Effectiveness of Martech Stack at Meeting Business Objectives

Percentage of Respondents

n = 418 excluding don’t know
Q: How effective do you believe your current marketing technology stack is at meeting your company’s marketing and business objectives today?
Source: 2019 Gartner Marketing Technology Survey
Note: Total does not equal 100% due to rounding.
The survey results also show a direct correlation between martech utilization and its perceived effectiveness within the organization. Respondents who feel their martech stack is “very” or “completely effective” use, on average, 59% of their martech stack’s full capabilities. Those with ineffective martech stacks, meanwhile, only use an average of 39% of their stack (see Figure 9). Marketers who follow a best-of-breed approach to martech selection utilize slightly more of their stack (59%) than those favoring an integrated suite (52%).

Figure 9. Those Who Judge Their Martech Effective Say They Utilize More of the Stack’s Capacity

Martech Stack Utilization by Perceived Effectiveness of Martech Stack

Mean Percentage Utilized

Perceived Neutral/Ineffective Martech Stack (n = 49)  Perceived Effective Martech Stack (n = 353)

0%  39%  59%

50%

100%

n = 392 excluding don’t knows (Base sizes vary by segment)
Q: Thinking about the totality of the capabilities made available by marketing technology, what percentage of those capabilities do you believe your company is utilizing today?
Q: How effective do you believe your current marketing technology stack is at meeting your company’s marketing and business objectives today?
Source: 2019 Gartner Marketing Technology Survey
Training, talent and integration impede martech effectiveness

This year’s survey identified a number of impediments standing in the way of martech’s contributions to core business goals. At the top of that list are training and upskilling existing martech talent, which the highest proportion of respondents cite as a “major impediment” (29%). Second on that list is the integration between martech solutions (27%), followed by identifying and recruiting martech talent (27%). See Figure 10.
The “major impediments” cited here are in agreement with those cited by respondents to Gartner’s 2019 Multichannel Marketing Survey, which also revolve around integration (leveraging integrated customer data) and talent (hiring qualified personnel to support multichannel marketing analytics). These impediments reinforce the necessity of investing in the users of technology and not merely acquiring more of it.

Other Gartner research offers some clues to the processes necessary to nurture marketing talent. Gartner’s Marketing Organizational Survey 2019 found 31% of its respondents citing “lack of resources” as a key weakness impacting marketing objective execution. Marketing organizations clearly seek agile and integrated processes that function smoothly, which some teams may roll into a dedicated marketing operations function. Regardless of how your organization attempts to resolve these issues, identifying the right team members, investing in their development and supporting their growth through repeatable processes will be the keys to raising utilization and delivering business results.

**Recommendations:**

- Benchmark your marketing maturity in order to identify skills and capability gaps. Use the Gartner Marketing Maturity Assessment tool to document the capabilities your team lacks.

- Invest in training by sending team members to conferences, workshops or training sessions to build capabilities around the technologies you already license. Develop a business case for these activities based on improved efficiency (such as cost savings from automating manual work) or productivity (such as improved effectiveness from using predictive analytics to power segmentation). (See “Tune Your Marketing Technology Stack to Support Algorithmic Marketing.”)
Marketers Are Confident in Their Existing Customer Profile Management Capabilities, but Underestimate the Need to Manage Privacy Risk

Last year’s Marketing Technology Survey revealed substantial confusion in the customer data platform (CDP) market (see “Survey Analysis: Distilling Marketer Adoption, Views and Misperceptions of Customer Data Platforms”). With rising consumer demand for more granular, individualized engagement from brands, integrating customer data from disparate channels remains a critical priority for marketers wishing to satisfy that demand.

Nearly two-thirds of marketing leaders surveyed in Gartner’s Multichannel Marketing Survey 2019 report challenges with leveraging integrated customer data and the deployment of multiple solutions to manage the separate tasks, including customer data aggregation, profile unification, segmentation and activation. Improving these capabilities with a purpose-built, stand-alone solution meant for marketers (such as a CDP) is an uncertain proposition in itself. Integrated suite CDP solutions have been released (or announced) that could reduce the demand for stand-alone technology, while the needs for data transparency drive demand consent management capability.

Customer data platforms may not be the answer for all marketers. Many martech leaders are confident of their martech stack’s support for current customer profile management. At least 60% of respondents rate their martech stack as highly or fully successful at key customer profile management tasks, such as data collection and profile unification (see Figure 11).

Figure 11. Existing Stack Handles Profile Management Successfully

![Level of Martech Stack Success for Customer Profile Management Tasks](chart)

<table>
<thead>
<tr>
<th>Task</th>
<th>Low/No Success (1, 2 Rating)</th>
<th>Moderate Success (3 Rating)</th>
<th>High/Full Success (4, 5 Rating)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Collection</td>
<td>6%</td>
<td>24%</td>
<td>70%</td>
</tr>
<tr>
<td>Activation</td>
<td>8%</td>
<td>29%</td>
<td>63%</td>
</tr>
<tr>
<td>Segmentation of Audiences</td>
<td>6%</td>
<td>34%</td>
<td>60%</td>
</tr>
<tr>
<td>Profile Unification</td>
<td>10%</td>
<td>28%</td>
<td>62%</td>
</tr>
</tbody>
</table>

n = 418 excluding don’t knows
Q: How successful is your current marketing technology stack at performing the following customer profile management tasks today?
Scale of 1-5 where 1 = Not at all successful and 5 = Fully successful
Source: 2019 Gartner Marketing Technology Survey
Improving customer profile management is crucial for increasing marketing maturity, and respondents with higher marketing maturity (Level 4 or 5) also reported higher levels of success at profile unification (68%) than those at maturity levels 3 and below (56%). Gartner client inquiry aligns with this finding, as marketers committed to improving their multichannel marketing maturity recognize that unsophisticated profile management presents an impediment to progress (see “Maturity Model for Multichannel Marketing”).

Confidence shown in this survey on the part of marketing technology teams suggests that some enterprises may be able to achieve success without stand-alone profile management solutions, such as customer data platforms. This is partly because they have lower expectations or have less advanced needs. Recognizing these more advanced needs may galvanize interest in CDPs; fewer than half of teams that rate their martech stack as highly or fully successful at managing customer profiles have a fully deployed CDP. This may mean that these marketers employ a combination of other tools to meet specific profile management needs and use cases (see “Align Your Customer Data Strategy With Your Marketing Technology Strategy”).

Among survey respondents, 72% of North American and U.K. respondents report they have fully deployed or are in the process of deploying a CDP, which represents a slight pullback compared with the prior year’s survey (see Note 1). For a technology that’s heading into the Trough of Disillusionment, marketing teams are right to be cautious and adjust plans based on their needs, strategies and budgets (see “Hype Cycle for Digital Marketing and Advertising, 2019”).

**Marketing technology teams are unprepared for data stewardship realities**

Understanding the strengths and prioritizations of planned deployments in a marketing environment with considerable macroeconomic uncertainty was one of the key goals for this year’s Marketing Technology Survey. One such environmental uncertainty we aimed to uncover revolved around the way martech leaders are navigating regional data privacy regulations and consumers’ mounting data concerns. Gartner predicts that by 2022, 30% of consumer-facing organizations will offer a self-service transparency portal to provide for preference and consent management (see “Market Guide for Consent and Preference Management for Marketers”).

This is the first year we asked marketing technology leaders specifically about adoption of consent and preference management platforms (CPMP). Compared to other technologies, adoption of these solutions is underwhelming in consideration to the looming demands for improved capabilities; just 50% of marketing teams report having a fully deployed CPMP, or being currently in the process of deploying one.
This relative lack of adoption raises a few red flags. The key functions of a CPMP are crucial, and not just for compliance with rising regulatory demands. Gartner’s 2019 Consumer Privacy Survey found that consumers view protection of their data as part of the brand experience. Therefore, brands should treat CPMP capabilities as part of defining their brand (see “Marketing to Privacy Focused Consumers in the Era of Personal Data”).

The low level of planned adoption (just 23% plan to deploy within two years) signals that marketers either do not understand or do not care about the consequences of failing to be good stewards of customer data. If faced with a choice for which planned technologies to scrap, respondents are most likely to place CPMP among the top 3. Meanwhile, respondents rank CDPs as the technology they would least likely cut from their planned deployments (see Figure 12). Marketing technology teams should look beyond market hype over CDPs and identify the solutions that will supply both capabilities; a failure to simultaneously manage channel and customer level consent will be problematic. Consider the opportunity to leverage stand-alone CDP vendors which already include some consent management features or nascent data governance offerings from integrated suite vendors such as Adobe.

Figure 11. Existing Stack Handles Profile Management Successfully

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**Planned Technologies That Would Be First to Be Postponed in Economic Downturn**

Top 3 Rank Percentage

```
<table>
<thead>
<tr>
<th>Technology</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent and Preference Management</td>
<td>32%</td>
</tr>
<tr>
<td>Dynamic Creative Optimization</td>
<td>28%</td>
</tr>
<tr>
<td>Demand Side Platform</td>
<td>28%</td>
</tr>
<tr>
<td>Customer Identity Management</td>
<td>25%</td>
</tr>
<tr>
<td>Multichannel Marketing Platform</td>
<td>24%</td>
</tr>
<tr>
<td>Personalization Platform</td>
<td>24%</td>
</tr>
<tr>
<td>Digital Asset Management</td>
<td>22%</td>
</tr>
<tr>
<td>Work or Project Management Platform</td>
<td>21%</td>
</tr>
<tr>
<td>Advanced Analytics/Data Science Tools</td>
<td>20%</td>
</tr>
<tr>
<td>Content Marketing Platform</td>
<td>18%</td>
</tr>
<tr>
<td>Digital Commerce Platform</td>
<td>17%</td>
</tr>
<tr>
<td>Mobile Marketing Platform</td>
<td>16%</td>
</tr>
<tr>
<td>Customer Data Platform</td>
<td>15%</td>
</tr>
</tbody>
</table>
```

n = 341 (Respondents with planned deployments in these areas; base sizes vary by technology)

Q: Please tell us the order in which you would postpone your planned marketing technology deployments starting with the first to be postponed.

Source: 2019 Gartner Marketing Technology Survey

This year’s survey found some notable variations in the ways marketers for B2C and B2B organizations plan for and use marketing technologies. Whereas B2B marketers tend to be more practical and selective in their implementation and use of technology, B2C marketers aim to make more of a transformational impact on the organization through the use of technology (see “Why Marketers Choose Multichannel Marketing Hubs”).

Perhaps this dichotomy can best explain the break between how B2C and B2B marketers select their organization’s martech. Whereas last year found no significant difference between the way B2C and B2B marketers select their company’s martech, this year found B2B marketers leaning toward a best-of-breed approach to martech selection. Fifty-nine percent of B2B marketers in North America and the U.K. report taking a best-of-breed approach, whereas only 43% of B2C marketers report the same. B2C marketers are more likely than B2B marketers to follow an integrated

Recommendations:

• Assess your customer data management technology needs and use cases, which might include the amalgamation of multiple point solutions, or an offering from an integrated suite (see “What Marketers Need to Know About Customer Data”).

• Coordinate CPMP projects with related customer data initiatives such as CDP, MMP and MMH deployments. Verify that complementary solutions work together seamlessly in environments comparable to yours and require a minimum of custom integration.

• Embrace a customer-centric approach to data privacy as a core brand value. Craft and publish clear data ethics and compliance policies to reduce the risk of public relations disasters and increased regulatory scrutiny that result from data abuse and misuse (see “Predicts 2019: Marketing Seeks a New Equilibrium”).

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suite approach to martech selection (40% versus 26%, respectively; see Note 1). For B2B marketers pursuing personalization or account-based marketing, it’s unlikely a single integrated suite will meet all of their needs. Beyond the core marketing automation solution to manage leads, B2B marketers may seek to add on and integrate new sources of target account data, multitouch attribution, predictive lead scoring or conversational marketing (see “The Gartner Marketing Technology Vendor Guide”).

This year also found B2B marketers slightly more confident than B2C marketing teams in their use of martech. While there is no significant variation in terms of how much marketers are utilizing their stack’s full breadth of capabilities, 42% of B2B marketers feel their stack is effective at meeting their organization’s marketing and business objectives. Only 34% of B2C marketers feel their stack is currently effective. B2B marketers also remain more optimistic. Sixty-one percent of B2B marketers feel that the effectiveness of their martech stack will improve over the next 18 months, while 51% of B2C marketers report the same. B2B marketers are highly dependent on essential tools, like a sales force automation system (SFA). However, they are also confronted with a cavalcade of new vendors promising improved demand generation performance by offering techniques which rose to prominence in B2C marketing (such as customer data platforms and programmatic advertising).

B2B marketers’ assuredness is set against a backdrop of challenges. Overall, a greater percentage of B2B marketers report facing “major impediments” than their B2C counterparts across a number of categories, particularly in identifying the right marketing technologies and constructing use cases for them (see Figure 13). B2B marketers often face challenges in aligning with sales leaders, as marketing teams seek to generate demand that can translate as quickly as possible into closed won business. Technology selection within B2B marketing teams is best run as a collaborative effort in partnership with sales and IT, which can help overcome challenges with technology selection as well as development of clear use cases (see “Strengthen B2B Demand Generation byAligning Marketing and Sales”).
**Recommendations:**

- B2B marketers should prioritize alignment with sales leaders to establish the business need, workflows and other parameters that will lead to successful use case definitions and technology selection (see “Why Marketers Choose B2B Marketing Automation Platforms”).

- Build support for new marketing technology investments — such as account-based marketing (ABM) or B2B attribution solutions — through clear mapping of the buyer journey. Ensure that ABM and personalization efforts are designed to reduce buyer effort through tailored help, rather than simply showing buyers that you recognize them (see “Building a Framework for B2B Personalization”).

---

**Figure 13. A Greater Percentage of B2B Marketers Face Major Challenges Than Their B2C Counterparts**

<table>
<thead>
<tr>
<th>Major Impediments to Achieving Business Goals by Business Model</th>
<th>Percentage of Respondents Selecting Major Impediment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constructing Clear Use Cases for Marketing Technology That Advances Business Goals</td>
<td>32% for B2B, 21% for B2C</td>
</tr>
<tr>
<td>Investing in Training/Upskilling Existing Martech Talent</td>
<td>29% for B2B, 24% for B2C</td>
</tr>
<tr>
<td>Identifying and Recruiting Marketing Technology Talent</td>
<td>29% for B2B, 24% for B2C</td>
</tr>
<tr>
<td>Integration Between Marketing Technology Solutions</td>
<td>28% for B2B, 28% for B2C</td>
</tr>
<tr>
<td>Identifying the Optimal Team Structure, Process or Workflows to Unlock Value From New Marketing Technology</td>
<td>27% for B2B, 28% for B2C</td>
</tr>
<tr>
<td>Identifying the Right Marketing Technologies</td>
<td>23% for B2B, 13% for B2C</td>
</tr>
<tr>
<td>Collaborating With IT</td>
<td>15% for B2B, 11% for B2C</td>
</tr>
<tr>
<td>Collaborating With Other Business Units</td>
<td>15% for B2B, 14% for B2C</td>
</tr>
</tbody>
</table>

n = 295 B2B and B2C Respondents

Q: How big of an impediment to achieving business goals is presented by each of the following?

Source: 2019 Gartner Marketing Technology Survey
Marketers See the Greatest Positive Future Impact From Two Foundational Technologies: Analytics and Automated Decisioning

In assessing the emerging technologies that will have the greatest positive impact on their company’s marketing efforts in the next five years, marketing technology leaders have a clear consensus. Given their fundamental objectives of extracting more meaningful insights from the data they collect and being able to act upon those insights in a timely manner, this level of agreement is not a surprise. Nearly half of all respondents (49%) rank advanced analytics and automated decisioning among the top 3 emerging technologies, an overwhelming greater percentage than the next most cited technologies, generative content creation (29%) and consent and preference management (28%). See Figure 14. Perhaps more convincing is that three times as many respondents (19%) rank advanced analytics and automated decisioning as the top technology versus event-triggered/real-time campaigns. Advanced analytics capabilities are increasingly found within martech solutions as well as stand-alone analytics platforms such as multichannel marketing hubs (see “Magic Quadrant for Multichannel Marketing Hubs”).

Figure 14. Martech Leaders Hold High Expectations for Advanced Analytics and Automated Decisioning

Top Emerging Technologies Expected to Have Largest Positive Impact on Marketing Over Next 5 Years

<table>
<thead>
<tr>
<th>Technology</th>
<th>Sum of Top 3</th>
<th>Top Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Analytics and Automated Decisioning</td>
<td>19%</td>
<td>49%</td>
</tr>
<tr>
<td>Generative Content Creation</td>
<td>10%</td>
<td>29%</td>
</tr>
<tr>
<td>Consent and Preference Management</td>
<td>9%</td>
<td>28%</td>
</tr>
<tr>
<td>Event-Triggered/Real-Time Campaigns</td>
<td>6%</td>
<td>27%</td>
</tr>
<tr>
<td>Multimodal Experiences</td>
<td>7%</td>
<td>23%</td>
</tr>
<tr>
<td>Identity Resolution</td>
<td>9%</td>
<td>23%</td>
</tr>
<tr>
<td>Blockchain-Based Applications</td>
<td>7%</td>
<td>23%</td>
</tr>
<tr>
<td>Augmented Reality</td>
<td>7%</td>
<td>22%</td>
</tr>
<tr>
<td>Natural Language Processing</td>
<td>5%</td>
<td>21%</td>
</tr>
<tr>
<td>Programmatic TV Advertising</td>
<td>7%</td>
<td>19%</td>
</tr>
<tr>
<td>Computer Vision</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>Shoppable Media</td>
<td>5%</td>
<td>16%</td>
</tr>
</tbody>
</table>

n = 417 excluding don’t knows
Q: What are the top emerging technologies you think will have the largest positive impact on your company’s marketing activities in the next 5 years?
Source: 2019 Gartner Marketing Technology Survey
Recommendations:

- Establish a cross-functional subteam among those responsible for the marketing technology roadmap whose responsibility specifically focuses on assessing the potential benefit of advanced technologies, such as advanced analytics and automated decisioning. Use this objective evaluation to judge new modules from existing vendors as well as innovations beyond the horizon of the martech roadmap. (See “3 Ways to Secure Executive Support for Emerging Marketing Technology Investments.”)

- Use Gartner’s “Hype Cycle for Digital Marketing and Advertising, 2019” as a basis for filtering and prioritizing emerging technologies in order to determine when to incorporate technologies into the martech roadmap.
Methodology

Gartner’s 2019 Marketing Technology Survey: Results presented are based on a Gartner study to understand how marketers are investing in, deploying and getting value out of technology. The primary research was conducted online during August 2019 through September 2019 among 418 respondents in the United States (45%), Canada (7%), France (11%), Germany (12%) and the United Kingdom (25%). Eighty-three percent of the respondents came from organizations with $1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (56 respondents), high tech (30 respondents), manufacturing (102 respondents), consumer products (38 respondents), media (31 respondents), retail (47 respondents), healthcare providers (37 respondents), IT and business services (40 respondents) and travel (37 respondents).

Respondents were required to have involvement in decisions pertaining to setting or influencing marketing technology strategy.

In instances where this research makes year-over-year comparisons, we exclude responses from marketers in Germany and France, since prior surveys did not poll marketers in those two countries.

The survey was developed collaboratively by a team of Gartner analysts who follow marketing and was reviewed, tested and administered by Gartner’s Research Data Analytics team.

Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.
Definitions

**Ad Hoc Martech Planning**: No formal plan for marketing technology is currently present.

**Advanced Analytics and Automated Decisioning**: Systems that change behaviors without being explicitly programmed, based on data collected, usage analysis and other observations for marketing use cases. This technology often appears to emulate human performance typically by learning, coming to its own conclusions, appearing to understand complex content, engaging in natural dialogs with people, enhancing human cognitive performance or replacing people on execution of nonroutine tasks.

**Advanced Analytics/Data Science Tools**: Software that supports data scientists in the performance of tasks across the entire data and analytics pipeline. These include tasks relating to data access and ingestion, data preparation, interactive exploration and visualization, feature engineering, advanced modeling, testing, training, deployment and performance engineering.

**Agile Martech Planning**: A mature strategy in which documented business goals and marketing technology strategy are developed, with agile processes and governance in use to revise the plan to address emergent needs.

**Augmented Reality**: Augmented reality (AR) aims to enhance users’ interaction environments rather than separate them from it. It is the real-time use of information in the form of text, graphics, audio and other virtual enhancements integrated with real-world objects. Experiences can be presented using smartphone displays, as well as head-mounted-type (HMD) displays.

**Best-Effort Martech Planning**: Attempts to look at the entire portfolio of solutions, but decisions for future implementations are often made outside of this plan.

**Blockchain-Based Applications**: Open-source applications built atop blockchain technology that incentivize participation and lack a central owner. Blockchain transactions consist of new entries being added to a decentralized ledger, requiring all parties participating in the network to reach consensus that these new entries are valid. Marketing applications might include identity management, contract management, rights management and influencer marketing.

**Computer Vision**: Includes object detection, logo detection and facial detection.

**Consent and Preference Management**: Tools that enable and consolidate end-user choices regarding how their personal data should be handled.
Definitions (continued)

**Content Marketing Platform:** Software solutions that support the practice of content marketing. Common capabilities include ideation, editorial planning, collaboration, workflow; tools to create, curate and publish content of all types; and analytics and insights to measure and optimize content performance.

**Customer Data Platform:** A marketing system that unifies a company’s customer data from marketing and other channels to enable customer modeling and optimize the timing and targeting of messages and offers.

**Customer Identity Management:** Software that enables consumer-facing identity and access management capabilities, more specifically user registration, social login, and user profile and consent management.

**Demand Side Platform:** Advertising acquisition software platforms that integrate with media marketplaces (networks, exchanges and supply-side platforms) to review and match available ad inventory in real time against programmatic buying criteria, generally using real-time bidding (RTB).

**Digital Asset Management:** Software that provides capabilities for ingestion, storage, retrieval, collaboration and life cycle management of rich media assets, including text, graphics, images, videos and audio.

**Digital Commerce Platform:** Products and services for creating engaging commerce experiences to drive transactions. They typically include customizable shopping carts, storefronts, merchandising tools and social features.

**Dynamic Creative Optimization:** Technologies that allow creative elements of an ad unit or website, such as images and copy, to be dynamically selected in real-time based on variable parameters such as viewer segmentation (geography, demographics, behavior) or context (device, location).

**Event-Triggered/Real-Time Campaigns:** Interpreting and responding to opportunities within time frames that provide business advantage using tools, technologies and processes that monitor and analyze information in real time.

**Formalized Martech Planning:** Planning for future marketing technology selection and adoption relies on the creation of and adherence to a formal roadmap which is used by the marketing and IT team.
Definitions (continued)

**Generative Content Creation**: Machine-generated text, graphics, music, video and other media that augments or replaces human content generation for scale, efficiency and other outcomes. For example, natural-language generation technologies dynamically identify the most relevant insights and context in data — trends, relationships and correlation patterns — to automatically produce personalized narratives for each user in his or her context.

**Identity Resolution**: Techniques to connect the activities of an individual customer or prospect across devices and channels to support ad targeting and personalization. Device identifiers can be explicitly supplied by the device OS (deterministic) or inferred statistically from observable characteristics (probabilistic).

**Mobile Marketing Platform**: Solutions that help marketers manage and activate marketing campaigns that target consumers with direct marketing on their mobile device. These platforms exploit a range of mobile-specific tactics, including mobile websites, mobile applications, messaging, push-notifications and mobile wallet cards.

**Multichannel Marketing Platform**: Software that enables companies to plan, design, launch, manage and measure marketing programs targeted at specific customer segments across a multichannel environment.

**Multimodal Experiences**: Adaptable customer experiences that provide multiple, integrated modes of interaction to users, including graphical, conversational and voice interfaces.

**Natural Language Processing (NLP)**: Includes text analytics, conversational UI, speech recognition, machine translation and some aspects of emotion detection.

**Personalization Platform**: Software that applies context about individual users to select, tailor and deliver messaging such as content, offers and other interactions through digital channels in support of three use cases: marketing, digital commerce and customer experience (CX).

**Programmatic TV Advertising**: The application of real-time digital automation and algorithmic techniques to the planning, sale, specification, delivery and insertion of commercials into TV shows.

**Shoppable Media**: Video, images and other rich media formats that trigger commerce transactions when a user selects an object representing showcased merchandise. Triggers include hot spots or buttons on an image, or video of a dress or gadget.
Definitions (continued)

**Work or Project Management Platform:** Tools and technologies to support the ideation, creation, production and management of marketing materials and related projects. This category includes multipurpose project management platforms, enterprise work management solutions and purpose-built creative operations tools.
Notes

Note 1: Note that, unlike the previous year’s Marketing Technology survey, this year’s survey included respondents from France and Germany. Therefore, in examining longitudinal changes, we have restricted our focus to those geographies common to both years’ surveys: North America and the U.K.

Note 2: The 2018 and 2019 surveys employ the same language for this question, but the 2019 survey presents a different range of budget numbers as possible responses than did the 2018 survey. Because last year’s survey did not poll marketers in France or Germany, this year-over-year comparison uses a base of North American and U.K. respondents only.
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