

2024

Digital Trends

B2B High Tech in Focus

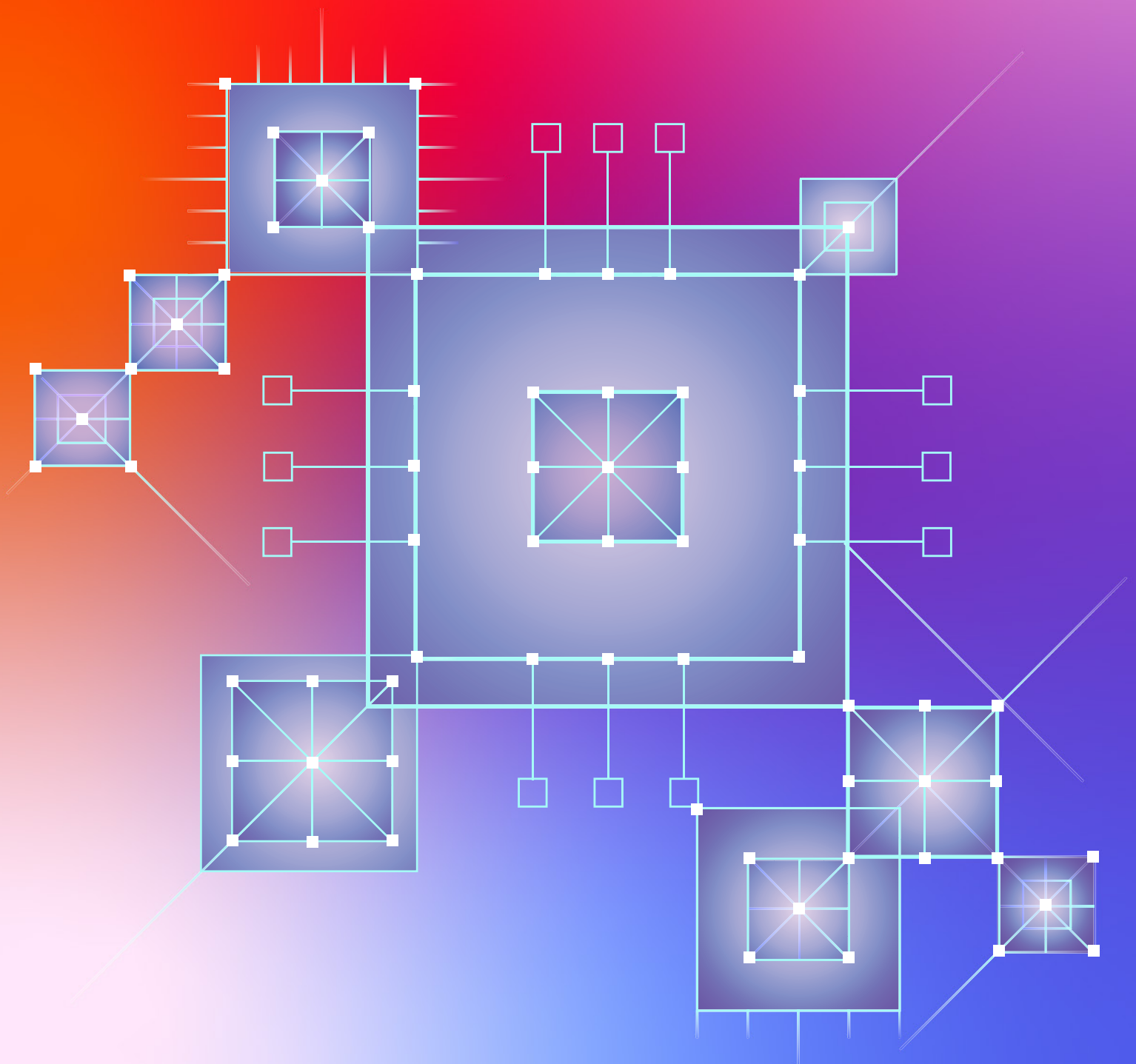


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Executive Summary

Now in its 14th year, the Adobe *Digital Trends* survey captures the pulse on what matters most to senior executives and practitioners across thousands of brands around the globe.

The *2024 Digital Trends—B2B High Tech in Focus* report focuses on the B2B technology sector (B2B tech), where long sales cycles, buying-by-committee, and complex product portfolios bring their own special challenges for marketers. In this report, we look at how Market Leaders—those who significantly outperformed the sector in 2023—navigate these complexities to create sector beating experiences. We also compare them with Market Followers, those whose performance matched or lagged the sector.

Key Learnings:

- **Personalisation is a goal not yet reached.** The complex B2B tech buyer journey, with multiple stakeholders, frequent personnel changes and lengthy sales cycles, complicates personalisation. Purchase decisions are often made across multi-functional committees, making real-time, one-to-one conversations challenging for marketers as they struggle to integrate data across various sources and platforms. In 2024, just 38% of B2B tech brands routinely personalise interactions in real time. Most rely on broad segmentation based on customers' historical data rather than real-time behaviours and data-driven predictions.
- **B2B tech marketers need clearer, better understood data.** If relevant customer data can't be unified from across an extensive variety of touchpoints, it can lead to an incomplete picture of the customer, lack of personalisation, and low relevance or value in customer experiences. Investments in data and insights are seen as pivotal to growth, and three-quarters of B2B executives are experiencing a major transformation in this area.
- **Market leaders invest in data foundations.** There is clear evidence that companies who invest in customer data systems enjoy more success in the market. Market Leaders are more than twice as likely to have rapid data insights than Followers (63% versus 30%). Unified data will also support more extensive use of generative AI, with 60% of practitioners planning to apply it for use cases such as reports and visualisations.
- **B2B tech marketers continue to tread carefully with generative AI.** Generative AI is already recognised as an important tool for content ideation and creation, particularly in personalising for the diverse B2B tech audience, but there are also perceived risks around quality. To combat this, B2B tech marketers are using the technology to support creatives and upskilling at a senior level to ensure they have the right strategies.

Section 1

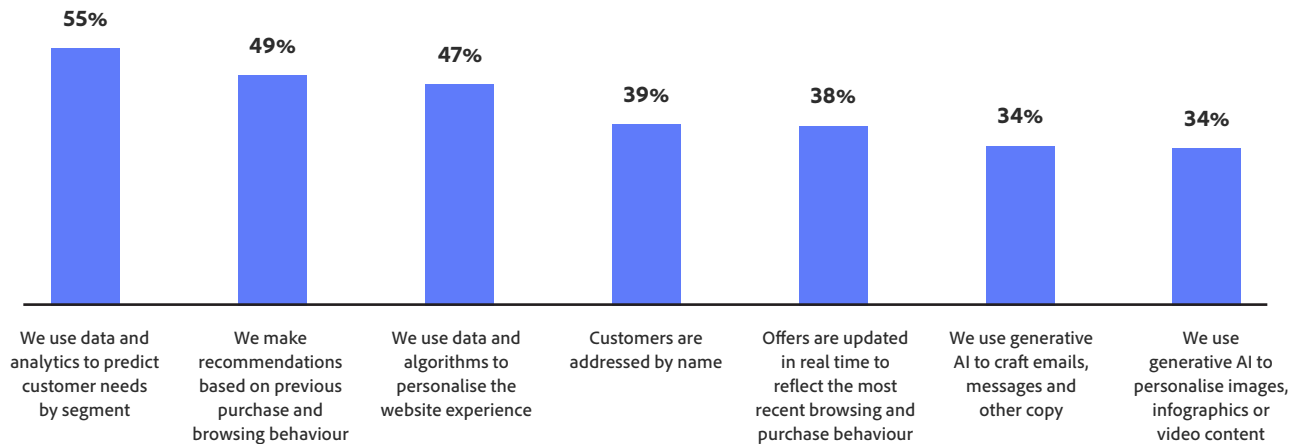
Building foundations for real-time personalisation.

Navigating complex buying journeys.

B2B tech marketers are struggling to reach the levels of hyper-personalisation their customers demand. Our research shows they continue to lean on broad-brush approaches such as data-led segmentation (55%) or algorithms (47%) to personalise the customer experience (Figure 1). Only 38% routinely personalise in real time. Admittedly, they're dealing with complicated buying journeys that require a much more detailed understanding of customer needs.

Gartner notes that “numerous buying group members may have different goals and needs as they do their own research.”¹ Given that the decision-making process in buying committees increasingly takes place online and ahead of sales engagement, B2B tech marketers need to become more adept at picking up buying signals. As a result, they need to delve into their data to anticipate customer goals and react accordingly.

Figure 1: In which of the following ways does your brand routinely personalise digital content for customers?



Base: 520 B2B tech practitioners

To keep up with the demands of buying cohorts, B2B tech brands will be more reliant than ever on tools that automate manual tasks. Yet, when it comes to personalised copy and creative content, only 34% are taking advantage of generative AI.

McKinsey noted in 2023 that winning B2B companies “go beyond account-based marketing and disproportionately use hyper-personalisation in their outreach.”² Closing the gap between current practices and the hyper-personalisation strategies of market leaders will be critical for B2B tech brands looking to stay competitive and drive growth.

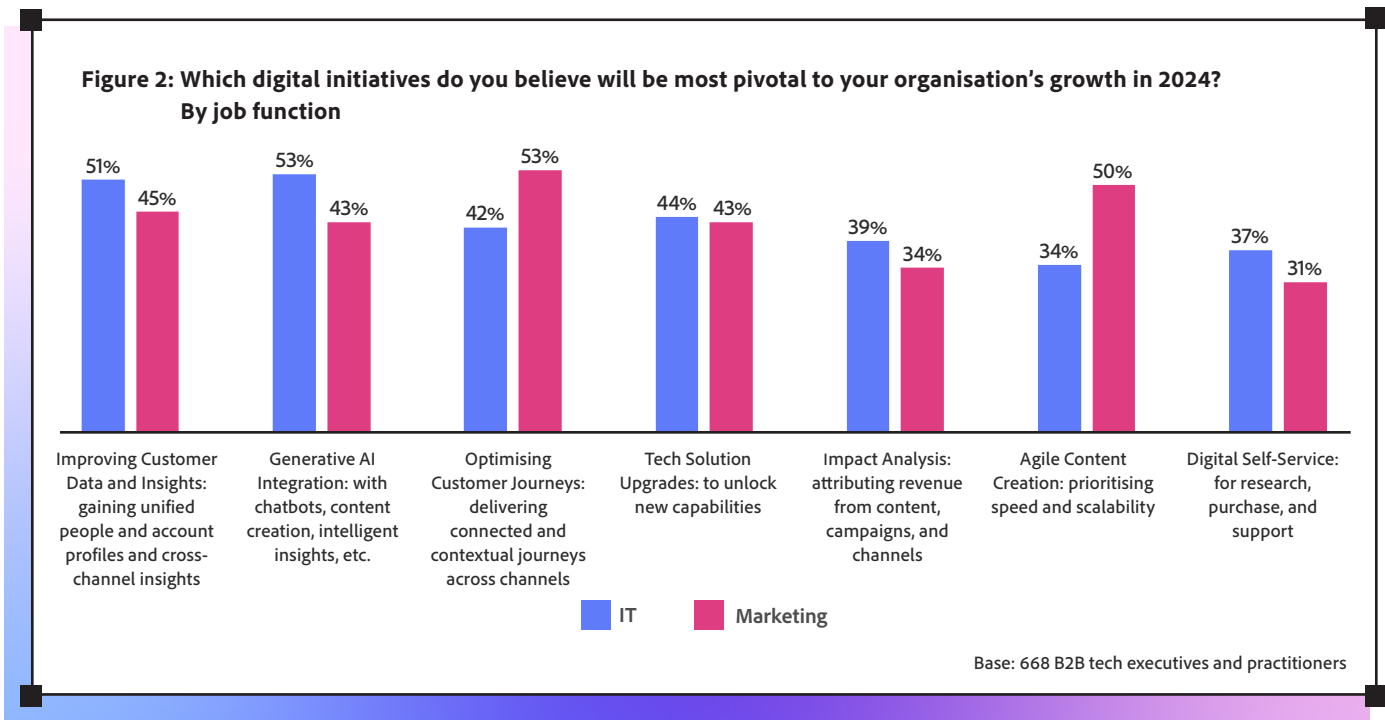
¹ <https://www.gartner.com/en/sales/insights/b2b-buying-journey>

² <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/ai-powered-marketing-and-sales-reach-new-heights-with-generative-ai>

Fueling growth with data and AI.

Given the challenges of complex B2B buying journeys and personalisation demands, “improving customer data and insights” emerged as one of the top digital initiatives for fueling their organisation’s growth in 2024.

Diving deeper reveals interesting differences between IT and marketing professionals’ priorities (Figure 2). While both IT professionals and marketing professionals see customer data and generative AI as pivotal to growth, marketing professionals also look to optimising customer journeys (53% versus 42%) and agile content creation (50% versus 34%). The alignment between IT and marketing on data and AI integration demonstrates just how foundational these will be for growth. To capitalise on this opportunity, organisations will need to ensure that initiatives around data and AI are not taking place in siloes.

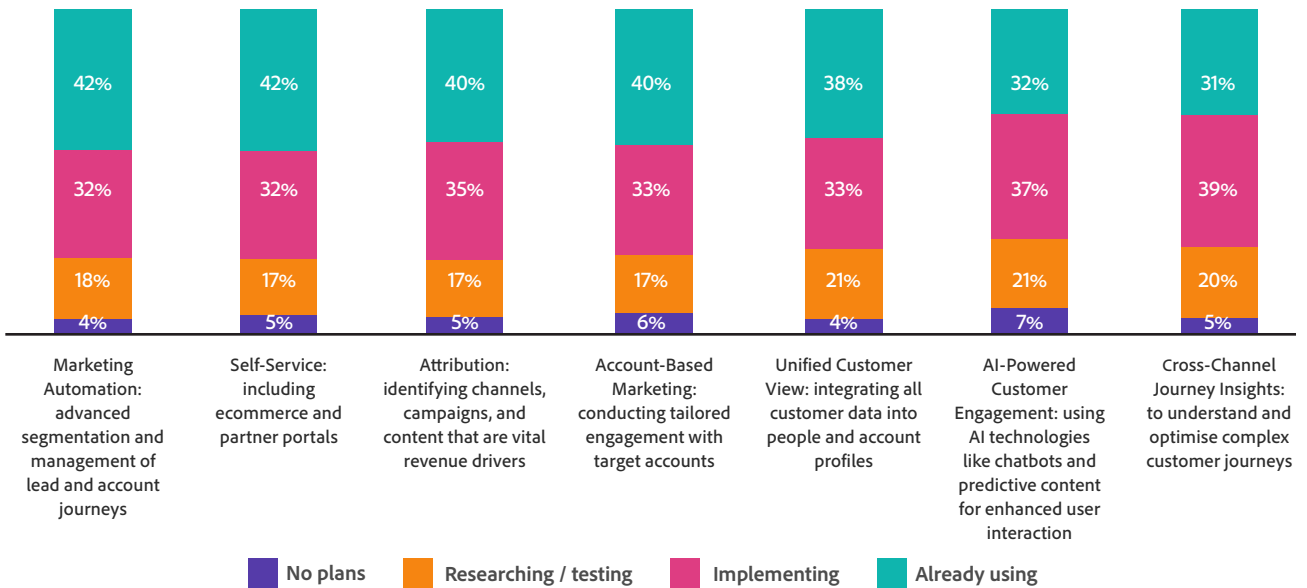


IT professionals prioritise technological solutions, with a higher focus on generative AI integration (53%) compared to their marketing counterparts. However, both groups recognise the critical role of data and AI in driving growth. With their complementary strengths, IT and marketing can collaborate to create seamless, personalised customer experiences that drive business success.

The use of technology to enable hyper-personalisation in B2B tech was not yet mainstream as of Q1 2024. Only around a third of respondents were benefiting from having a unified customer view that was allowing them to integrate all their customer data (38%) or exploit AI-powered customer engagement (32%).

However, there is a wave of new adopters working on implementation — 37% are in the process of onboarding AI-based tools (Figure 3).

Figure 3: What is the implementation status of the following areas in your organisation?

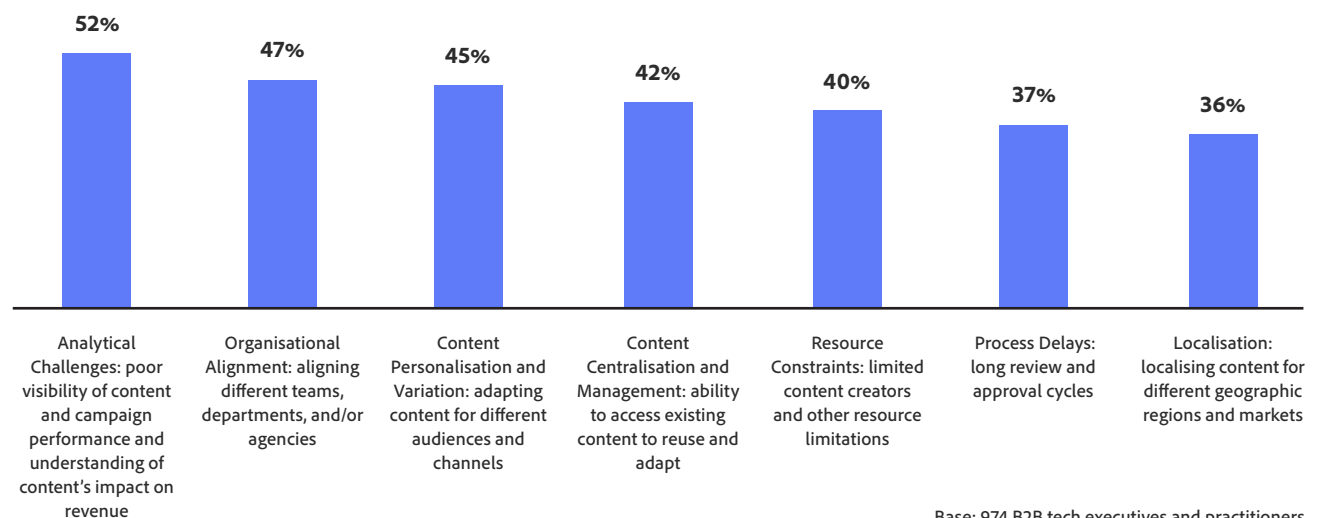


Base: 979 B2B tech executives and practitioners

Unifying data for actionable content insights.

Content and campaign performance is heavily reliant on a strong, real-time feedback loop. In B2B tech, that loop gets broken by multiple influencers and decision-makers, as well as internal factors such as siloed and incomplete data, and disconnected teams and processes. These challenges contribute to the biggest content production and delivery hurdle: poor visibility of content and campaign performance and understanding of the content's impact on revenue (52%, Figure 4).

Figure 4: Looking ahead to next year, what will be your organisation's most significant content production and delivery challenges



Base: 974 B2B tech executives and practitioners

Without the correct analytics in hand, organisations cannot allocate resources properly. Resource constraints and limitations are an issue for 40% of organisations. Process delays, a problem for 37% of organisations, are further exacerbated by content process breakdowns, such as the use of multiple tools, the need for cross-departmental collaboration, and lack of integration.

By improving their approach to analytics, organisations can better understand these challenges and make data-driven decisions to address them effectively.

Forrester also notes that: “Companies that track how their customers perceive and experience value are more likely to achieve their own internal performance objectives.”³ Delving into customer feedback to understand the customer experience is a vital part of an organisation's approach to analytics.

Section 2

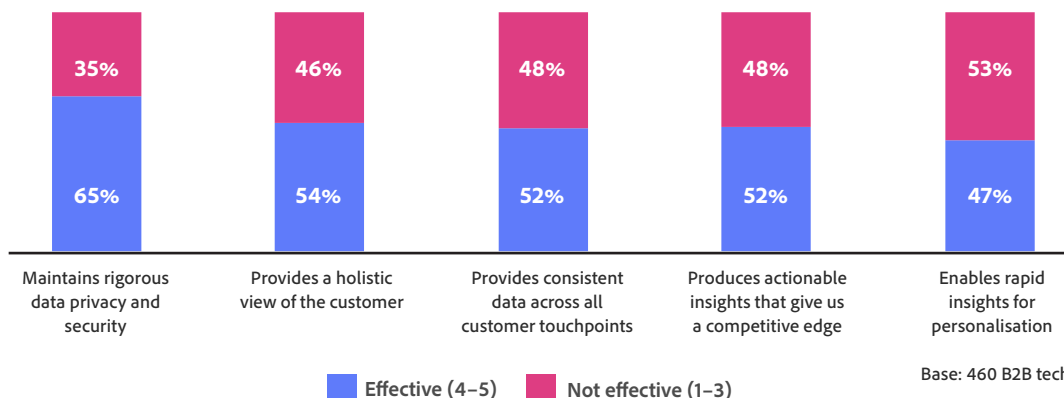
Overcoming data barriers.

Inconsistent data hindering progress.

The data story for B2B tech companies is a case of the haves and the have-nots. Brands are split roughly down the middle into those who have ready access to customer data via an effective customer data system and those who don't. Only 52% of practitioners say their customer data system is effective at providing them with consistent data across all touchpoints; the rest are held back by their systems. Similarly, only 47% have effective customer data systems that enable rapid insights for personalisation (Figure 5).

This is a critical priority for B2B tech marketers, given their need to anticipate customer needs and react quickly across some very specific buying scenarios.

Figure 5: On a scale of 1 to 5, with 5 being most effective, how effective is your customer data system in meeting each of the following objectives: Our customer data system...



³ <https://www.forrester.com/blogs/the-state-of-b2b-marketing-measurement-in-2023-five-key-observations/>

Integrated solutions are enabling just this. Our survey found that Market Leaders are more than twice as likely to have rapid data insights than Followers (63% versus 30%), indicating they have a better data structure across the business, rather than in silos.

Two-thirds (67%) of those companies using an integrated SaaS solution for customer experience say it unifies their data, enabling consistency across every customer interaction. With data that is well-organised and readily available, B2B tech firms would be primed to make use of automation and generative AI to derive insights.

For example, Qualcomm, a renowned technology leader with expertise in telecom and semiconductors, has empowered employees to connect data across all channels—from CRM and lead generation data to website visits and emails—with governance and security. Teams can orchestrate content experiences across buyer journeys that may begin on a website and end at a trade show while developing a feedback loop where insights are broadly shared across the organisation.⁴

“ Our focus has expanded to a broad spectrum of users. This partnership with Adobe enables us to innovate and provide tailored experiences. It’s about delivering personalised journeys that resonate with each user group.”

Jeremy Krall
Senior Director of Marketing Technologies & Digital Ecosystems, Qualcomm

Qualcomm

⁴ <https://business.adobe.com/customer-success-stories/qualcomm-case-study.html>

Section 3

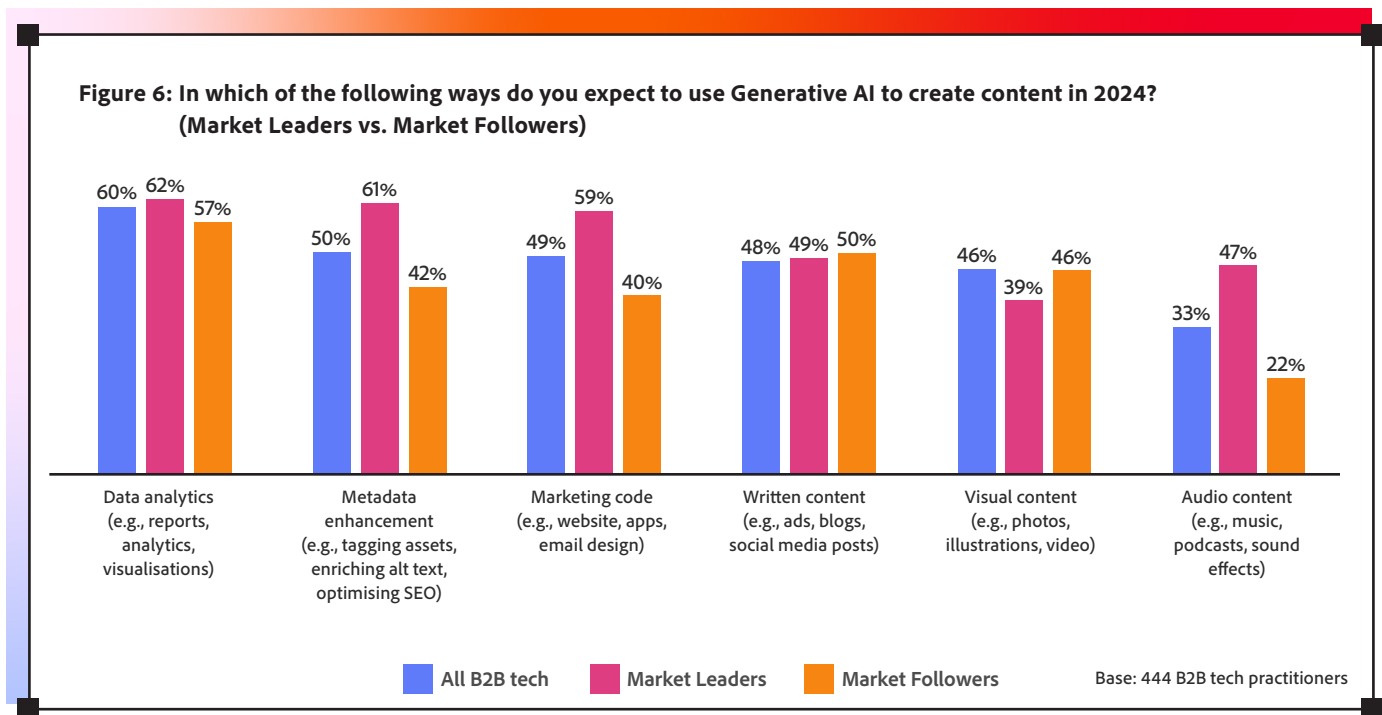
Unlocking generative AI's potential.

Transforming content with AI.

Just as Market Leaders in the B2B tech sector are using integrated solutions to gain a data-driven edge, they are also setting the pace when it comes to generative AI adoption.

According to our survey, the B2B tech sector is leading the way in generative AI adoption, with 35% of companies already having solutions in place compared to just 23% across all industries.

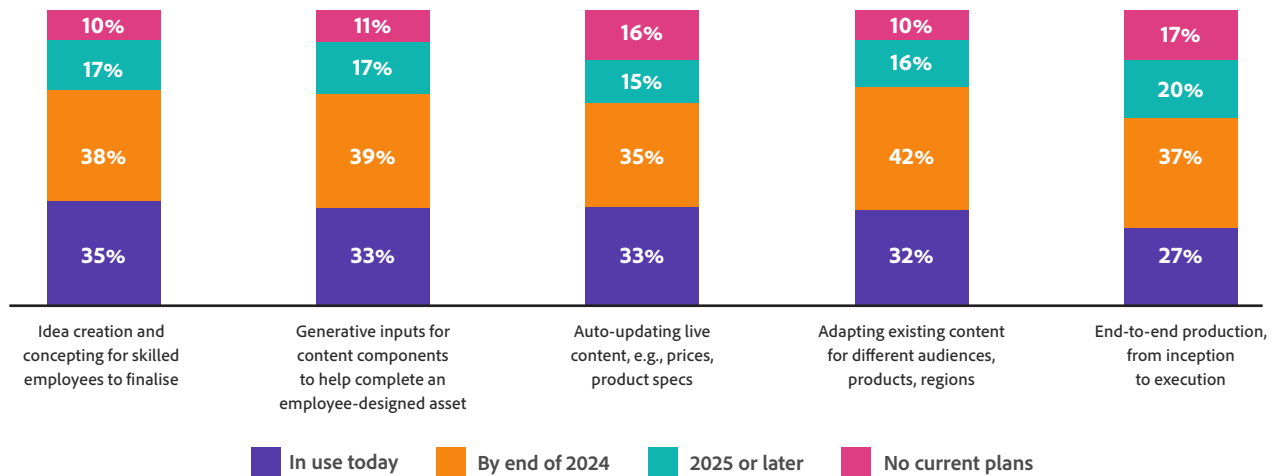
The complex B2B tech sales process, often involving account-based marketing (ABM) strategies and a need for close marketing-sales alignment, amplifies the need for quick data-driven insights. Most B2B practitioners (60%) plan to use generative AI to condense data into actionable reports and visualisations, potentially revolutionising how B2B teams leverage data (Figure 6).



Market Leaders again show the way. They can already make more sophisticated use of generative AI's potential, thus improving their competitive position. More than half (61%) of Market Leaders expect to use generative AI for metadata enhancements versus 42% of Followers.

There is a similar split among those who plan to use generative AI to create marketing code, for example, website, apps, and email design (59% of Leaders versus 40% of Followers, Figure 6).

Figure 7: When do you expect your marketing organisation to use generative AI in each of the following areas of content production?



Base: 474 B2B tech practitioners

A large proportion of practitioners (83%) in B2B tech see clear benefits in using generative AI for content but they are treading cautiously. They are using the technology to support rather than replace creative talent as well as remove lower-value work like versioning and localisation. As our research reveals, only about a quarter (27%) of the practitioners are currently using generative AI for end-to-end production.

In B2B tech, current use ranges from brainstorming to condensing large documents into summaries. Generative AI content outlines can speed up the human-led creative process, particularly when some B2B tech concepts involve complex ideas, jargon, or supporting data.⁵

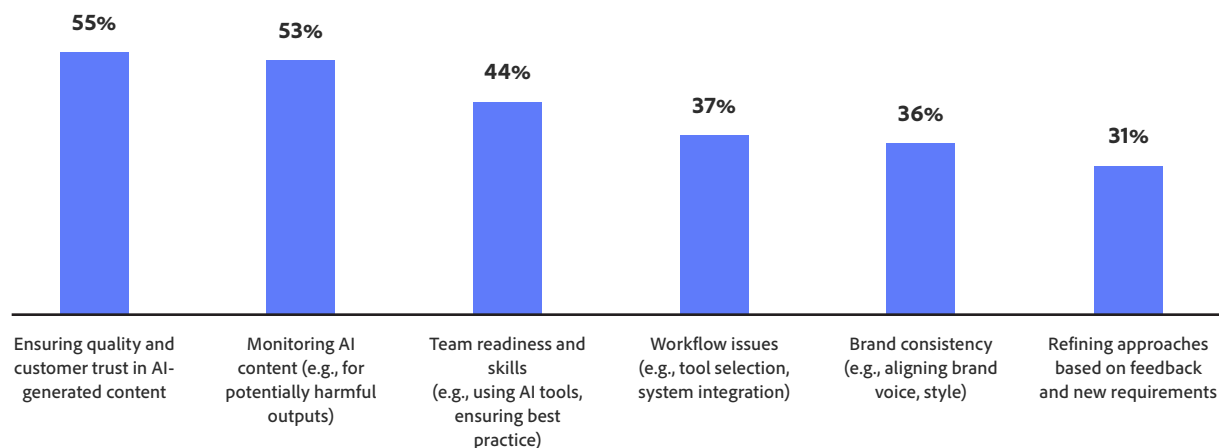
Balancing innovation and trust.

Our survey reveals that 35% of B2B tech practitioners currently use generative AI to assist skilled employees with idea creation and concepting, while 33% use it to create content components for employee-designed assets (Figure 7). Notably, these figures are expected to double by the end of 2024.

Generative AI output is likely to remain heavily monitored and edited by human teams in the near future, especially given its potential for hallucinations and inaccuracies. B2B tech practitioners acknowledge these shortcomings, citing the risk to quality and customer trust as their top concern around AI-generated content.

⁵ <https://zapier.com/blog/ai-content-creation/>

Figure 8: What are the top challenges you believe brands will face in managing AI-generated content in 2024?



Base: 438 B2B tech practitioners

Managing generative AI content requires human oversight. Unsurprisingly, 53% of B2B tech practitioners see significant challenges in monitoring AI-generated content to ensure that outputs are not harmful to customers.

Despite these concerns, our research reveals that B2B tech companies are prioritising content strategy improvements in 2024. Customising content to meet different customer needs and making better use of analytics and insights for content performance are the top two priorities (52% of respondents for both).

These priorities underscore the importance of using generative AI and insights to create personalised content while maintaining a cautious approach to ensure quality and trust.

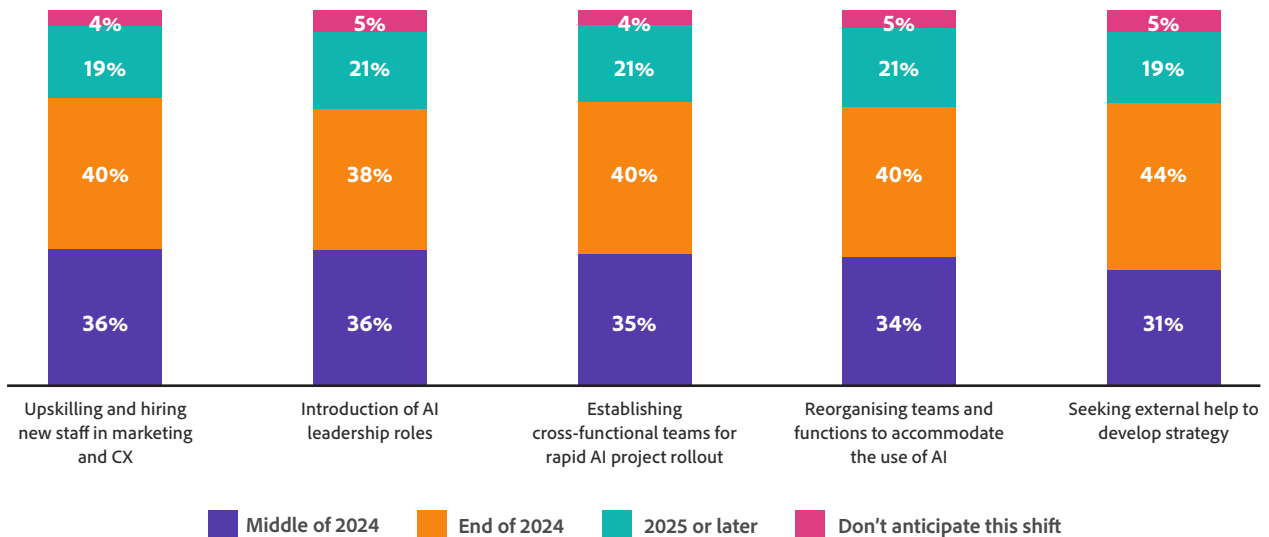
Empowering teams for the generative AI era.

Recognising that deploying generative AI will demand new skills and strategies, nearly three-quarters of B2B tech firms will have dedicated roles to lead generative AI adoption (74%) by the end of 2024, with a similar number (75%) seeking outside expert help (Figure 9).

Market Leaders are providing a blueprint for generative AI adoption in the B2B tech sector, with 80% planning to introduce leadership roles (versus 66% for Followers) and 78% will bring in outside help (versus 69%).

Company-wide transformation is essential given the cross-departmental nature of B2B tech marketing. It is gratifying to note that three-quarters (75%) of senior executives have or are working towards cross-functional teams for AI deployment by the end of 2024, and a similar number (74%) are also reorganising their teams and functions to accommodate use of AI.

Figure 9: Will you be making significant changes to your organisational structure to support the adoption of Generative AI? If so, by when?



Base: 551 B2B tech senior executives

Recommendations

Preparing B2B tech for the future.

- **Unify data to navigate complex B2B journeys.** B2B tech's intricate buying cycles, involving multiple stakeholders and extended sales processes, generate valuable but often fragmented data. To effectively harness this data for real-time personalisation, buying group engagement, and ABM, marketers must prioritise data unification. By integrating data across touchpoints and making it accessible to teams and AI tools, companies gain a holistic view of their customers, enabling them to deliver targeted, high-impact engagement. Market Leaders with unified data systems are already pulling ahead, using advanced personalisation and AI to drive growth.
- **Target more accessible use cases such as content creation to get immediate benefits from generative AI.** As early adopters with deep technical expertise, B2B tech organisations are well positioned to integrate generative AI across marketing and sales. To maximise ROI, companies should first identify manual processes that can benefit from automation. Quick-win use cases that deliver clear value help build momentum and encourage broader adoption. This paves the way for more advanced applications like streamlining complex data analysis for ABM and enabling contextual sales interactions. Involving cross-functional teams and seeking guidance from leaders ensures AI enhances rather than disrupts critical processes. Pilot programs, upskilling initiatives, and AI assistants can build readiness for broader adoption.
- **Match speed with caution and due diligence.** The B2B tech marketplace evolves at speed and generative AI is an ideal tool to help keep up with change, but it has trust and accuracy challenges. Leading companies address this by keeping humans in the loop and with upskilling that allows for innovation within guardrails.

Methodology

Executive survey

The executive survey was fielded in January and February 2024 to Econsultancy, Adobe lists, and external panels. Launched on 1 January, 2024, the survey closed on 19 February, 2024, with 1,192 client-side respondents working in B2B tech.

Demographics Profiles

- About half of respondents (49%) are at the senior director level or above and 51% are at the practitioner level. Throughout the report, we include comparisons between these two groups.
- We also draw comparisons between Market Leaders (senior executives and practitioners who agreed their organisation “significantly outperformed” their sector in 2023) and Market Followers (those whose organisation had “kept pace” or “slightly or significantly underperformed” their sector). Market Leaders represented 28% of respondents, while 32% classified their organisations as Market Followers, with the remainder showing more moderate progress.
- The most significant regions by sample size include Europe (36%), North America (39%), and Asia Pacific (24%).

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