2025

State of B2B Pipeline Growth

How B2B Marketers are Navigating Uncertainty

Pipeline360

As a fellow B2B marketer, I know that driving pipeline - let alone predictable pipeline - has never been more challenging—or more critical. In an era of evolving buyer expectations, increasing scrutiny on marketing ROI, and rapid technological advancements, staying ahead requires not just data, but actionable insights.

That's why I'm thrilled to introduce Pipeline360's 2025 **State of B2B Pipeline Growth Report.** This comprehensive study uncovers the biggest challenges facing B2B marketing teams today and highlights the key strategies that high-performing teams are using to drive success. Through rigorous analysis, we've identified six core areas where top marketers excel: data utilization, streamlined tech stacks, buyer engagement, lead nurturing, content quality, and sales-marketing alignment.

This research represents insights from more than 500 B2B revenue marketing professionals across the US, UK, Europe, and Asia.

The insights contained in this report are not just theoretical—they are grounded in the real-world experiences of marketers who are driving measurable growth today. We hope these findings empower you to refine your strategy, optimize your marketing efforts, and ultimately maximize your output.

Throughout 2025, our team will be hitting the road, hosting workshops, and engaging in conversations with marketers like you to discuss these insights in greater depth. We look forward to learning from you as much as we hope you'll learn from this report. See you along the journey!

Yours truly,

Matt Hummel
VP, Marketing
Pipeline360

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Pipeline360

Executive Summary

B2B marketing teams face compounding uncertainties in 2025, navigating economic headwinds while managing internal pressure to deliver results with tighter resources and patchy engagement.

Our comprehensive survey of 500+ B2B revenue marketers globally was conducted to better understand the evolving challenges marketers face and how high-performing teams are adapting. As an organization committed to helping B2B companies build high-quality, predictable pipeline at scale, we sought to identify actionable insights that can help marketing teams thrive despite current challenges.
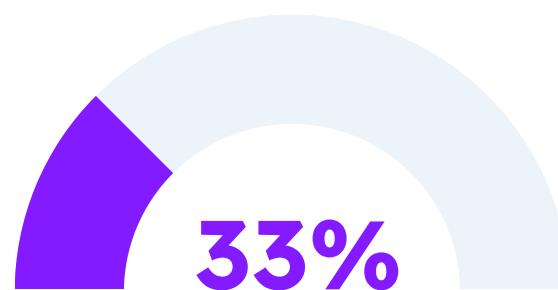
Our research reveals:

45%
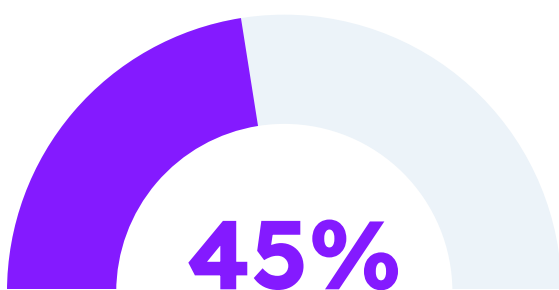
45% cite economic uncertainty as their top challenge

36%
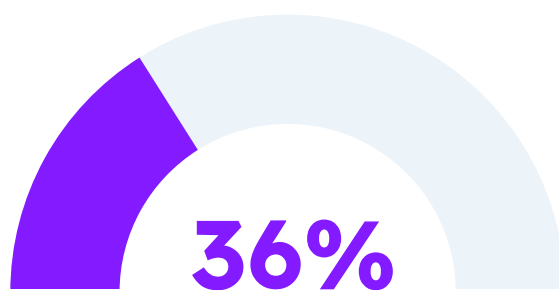
36% report that these external challenges are compounded by internal expectations that are unrealistic

33%

33% struggle with declining engagement metrics, including declining email open rates and form fills

What are the top 3 challenges you are facing right now in marketing?

Challenge	Percentage
Economic uncertainty	45%
Unrealistic expectations	36%
Engagement challenges	33%
Resource challenges	32%
Content and channel issues	32%
Organization alignment issues	29%
Technology issues	25%
Data concerns	25%
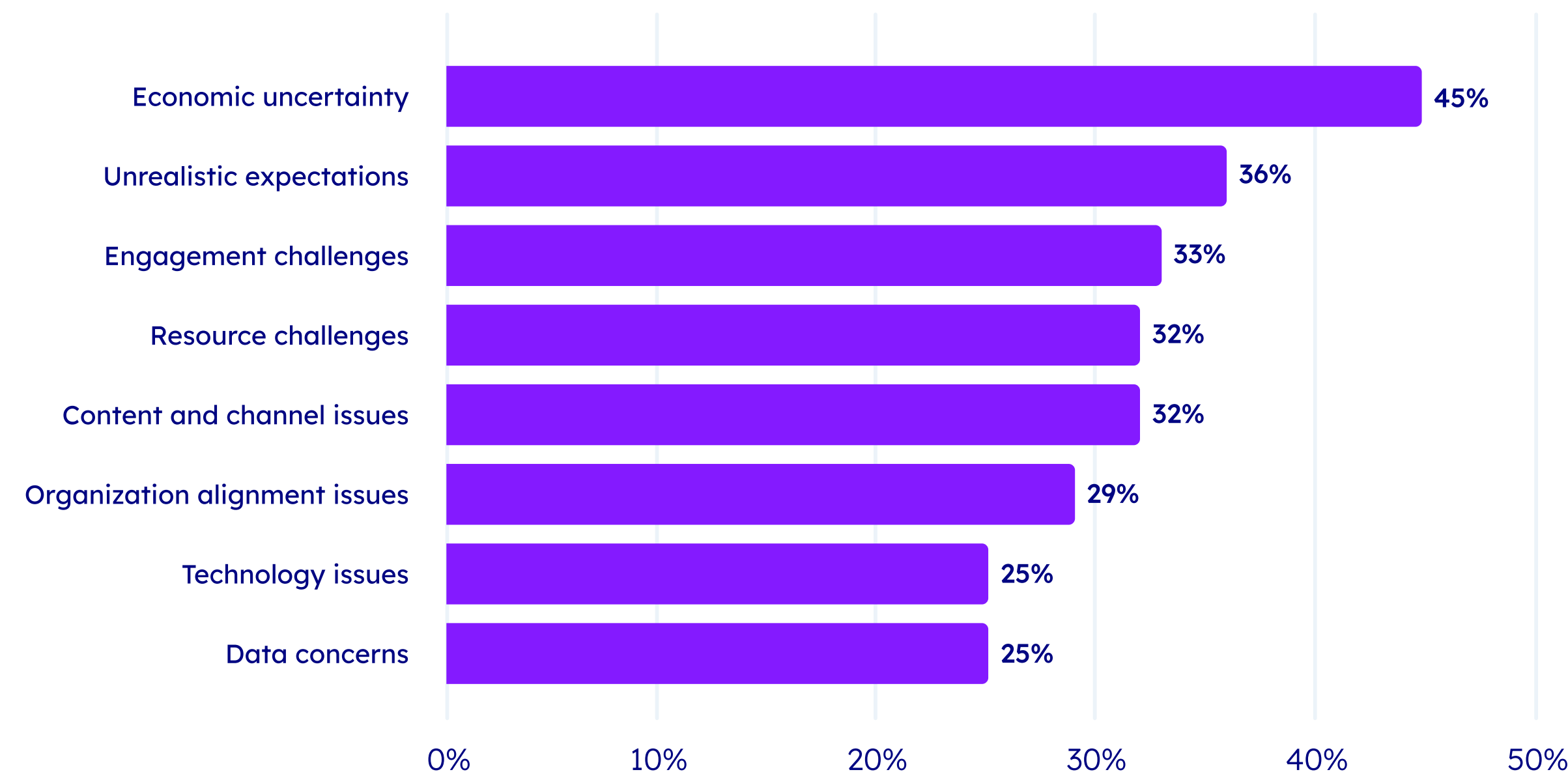
Executive Summary

Yet amidst these challenges, high-performing marketing teams are distinguishing themselves through six key characteristics:

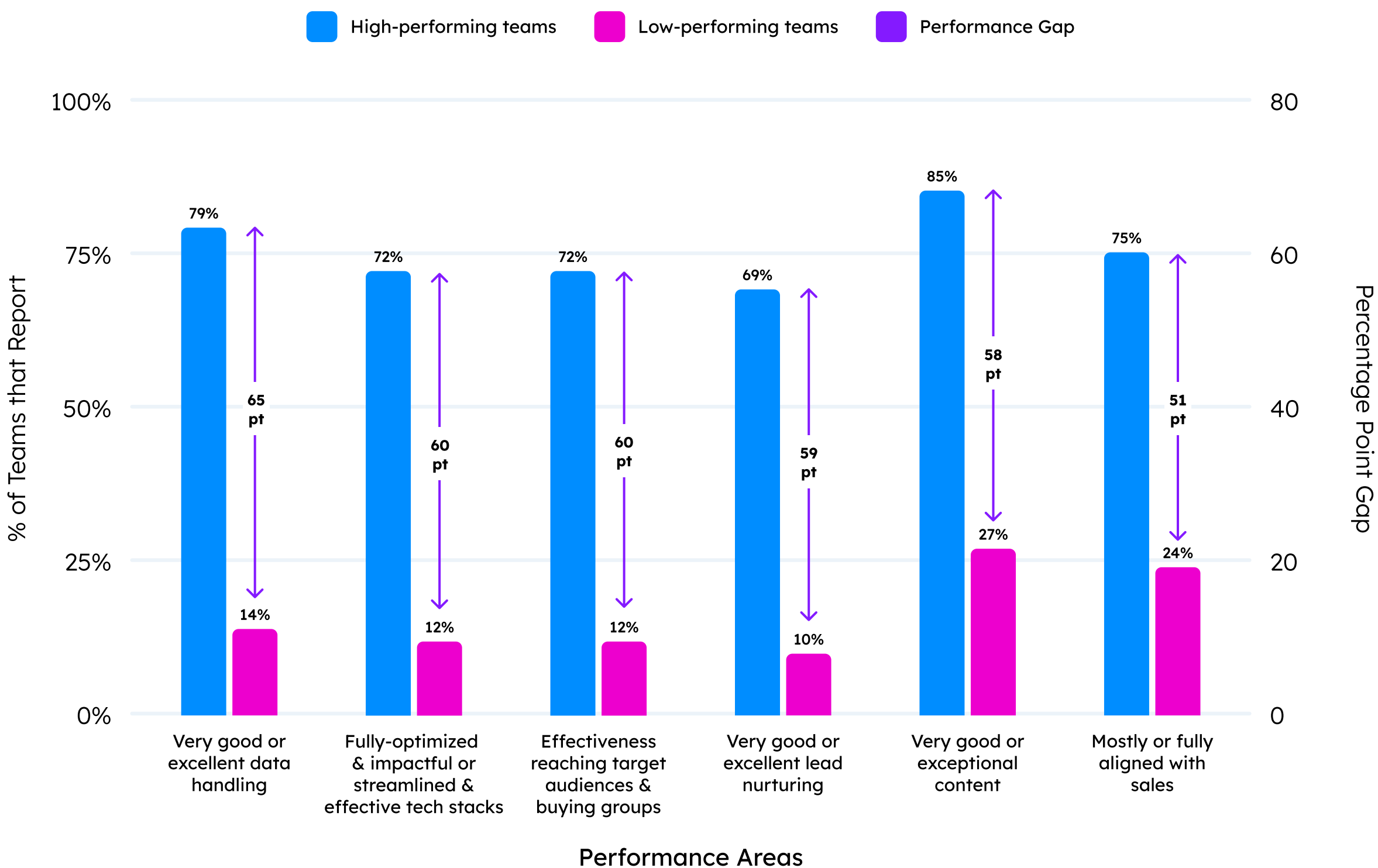| 01 | **Effective data-handling practices** | 65 point gap |
02	**Streamlined tech stacks**	60 point gap
03	**Consistent buyer engagement**	60 point gap
04	**Superior lead nurturing**	59 point gap
05	**Above-average content quality**	58 point gap
06	**Strong alignment with sales**	51 point gap

Where high- and low-performing teams see the biggest performance gaps

Legend: ■ High-performing teams ■ Low-performing teams ■ Performance Gap

Y-axis (left): % of Teams that Report — 0%, 25%, 50%, 75%, 100%
Y-axis (right): Percentage Point Gap — 0, 20, 40, 60, 80
X-axis: Performance Areas

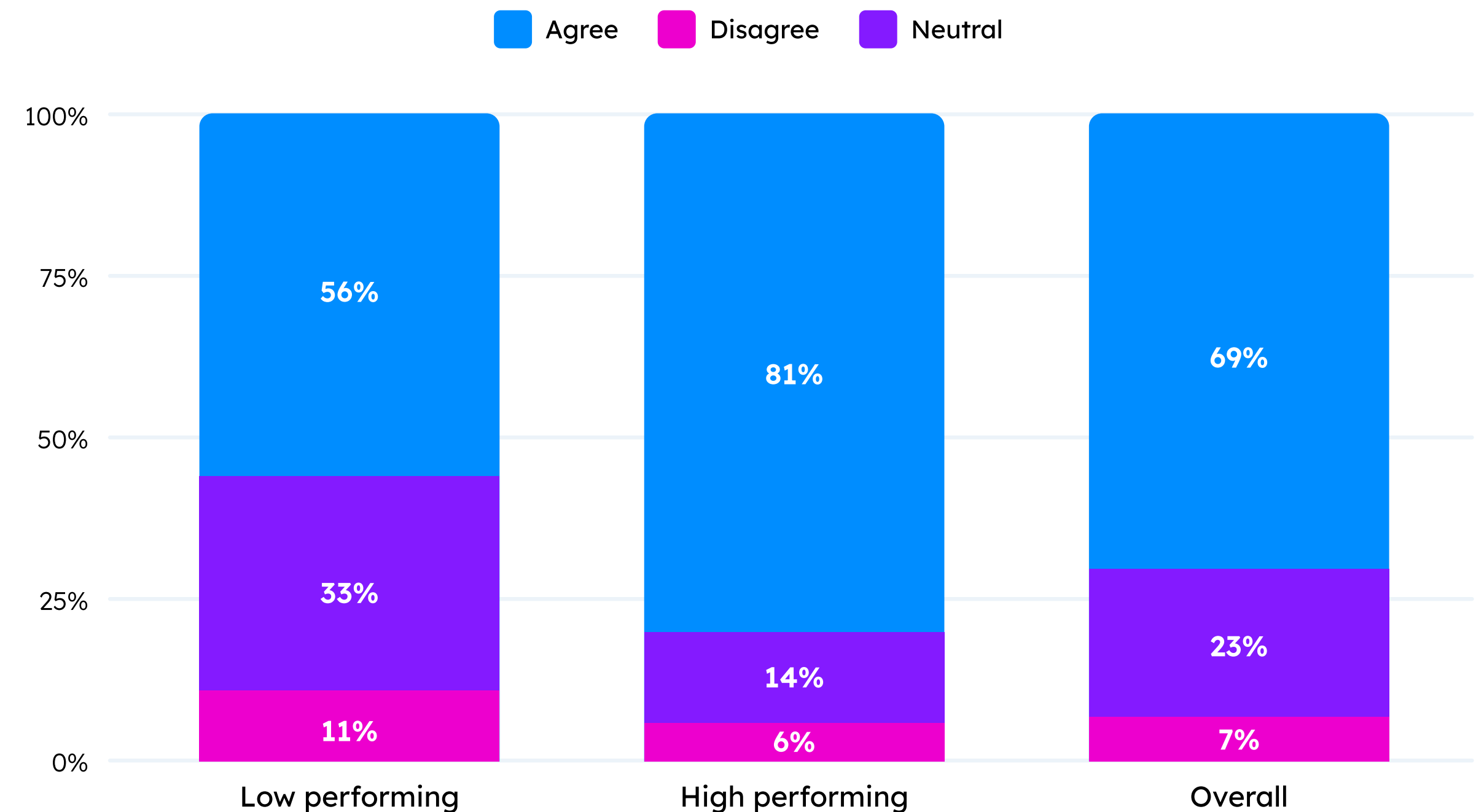| Performance Area	High-performing	Low-performing	Gap
Very good or excellent data handling	79%	14%	65 pt
Fully-optimized & impactful or streamlined & effective tech stacks	72%	12%	60 pt
Effectiveness reaching target audiences & buying groups	72%	12%	60 pt
Very good or excellent lead nurturing	69%	10%	59 pt
Very good or exceptional content	85%	27%	58 pt
Mostly or fully aligned with sales	75%	24%	51 pt

Executive Summary

High performers are also focused on outcomes, with 50% relying on revenue generated as their primary KPI (see pg. 14), and 81% preferring delivered services over adding more tools.

The strategies, tactics, and priorities employed by high performers provide a roadmap for turning uncertainty into predictable pipeline and consistent revenue generation. This report outlines the pragmatic approaches taken by outperformers, and offers insights for teams seeking to gain control in 2025 and beyond.

Marketing teams value actionable support, like delivered insights or done-for-you services, over adding new tools to their tech stack.

Legend: ■ Agree ■ Disagree ■ Neutral

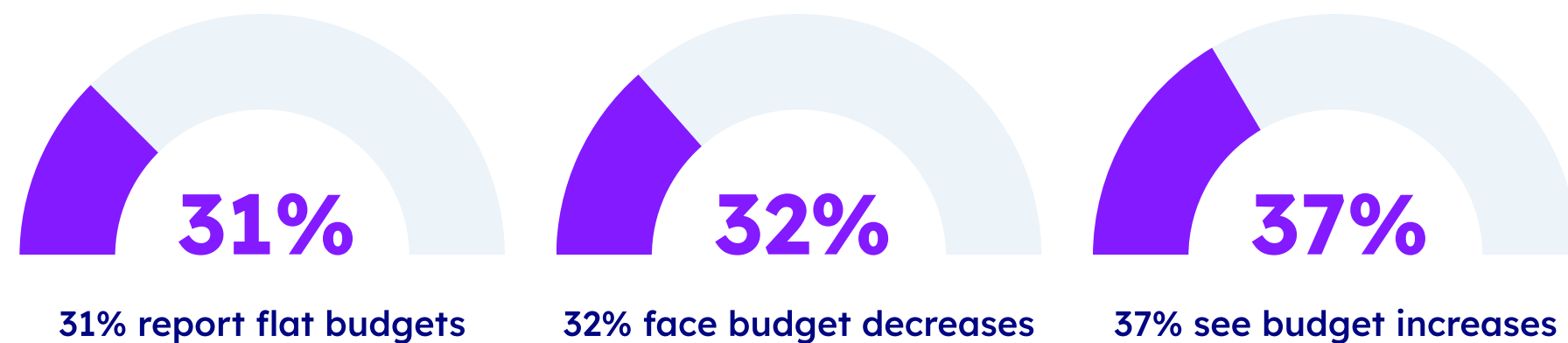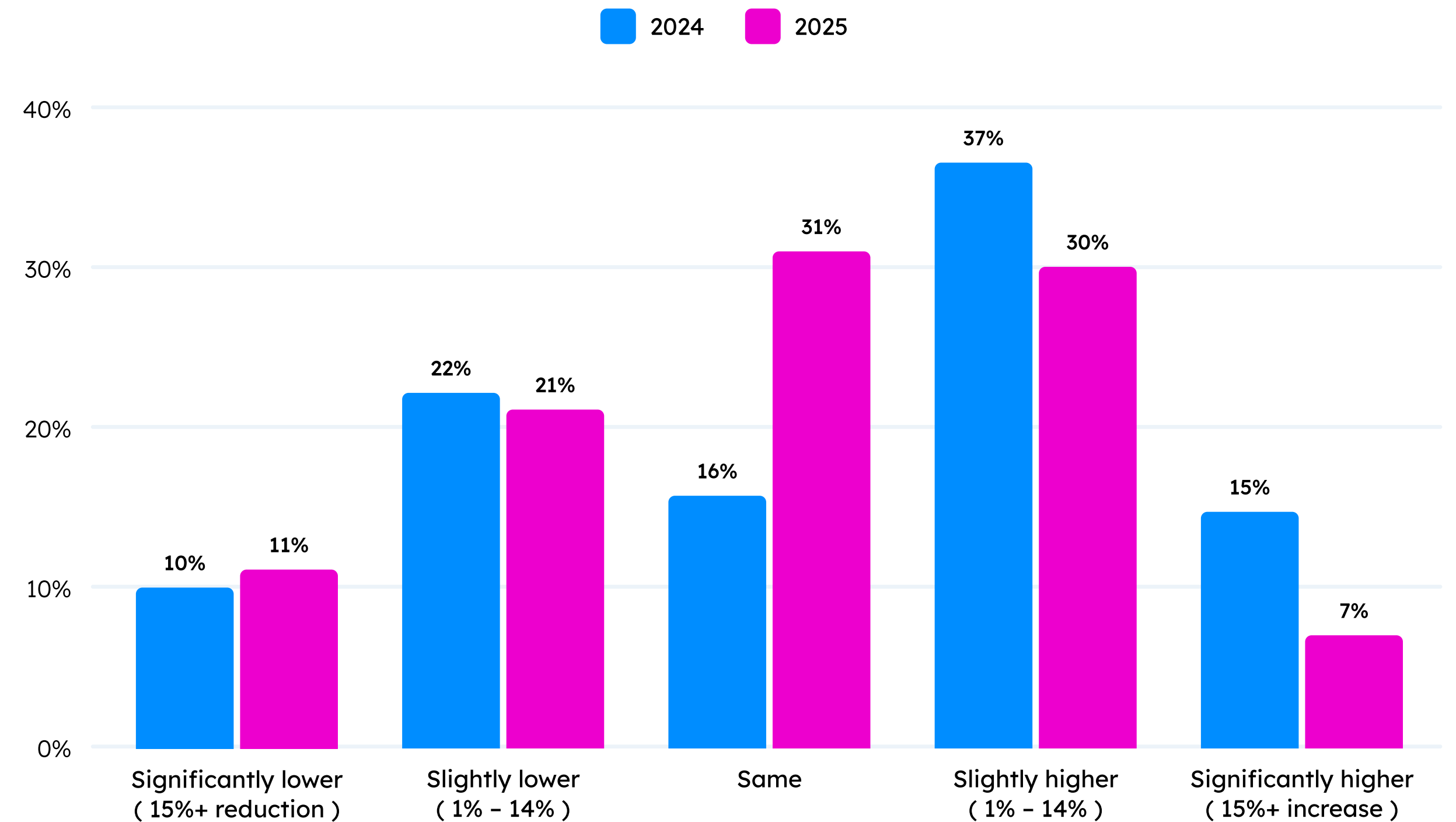|	Low performing	High performing	Overall
Agree	56%	81%	69%
Neutral	33%	14%	23%
Disagree	11%	6%	7%

Findings

Economic Uncertainty

Findings: Economic Uncertainty

Budget Constraints

- Economic uncertainty as the dominant challenge

- Budget and staffing constraints create pressure to do more with less

- **Budget shifts in 2025:**

31%
31% report flat budgets

32%
32% face budget decreases

37%
37% see budget increases

How does your current marketing budget compare to your budget last year?

■ 2024   ■ 2025

	Significantly lower (15%+ reduction)	Slightly lower (1% – 14%)	Same	Slightly higher (1% – 14%)	Significantly higher (15%+ increase)
2024	10%	22%	16%	37%	15%
2025	11%	21%	31%	30%	7%

Findings: Economic Uncertainty

Staff Constraints

45% hold staffing steady
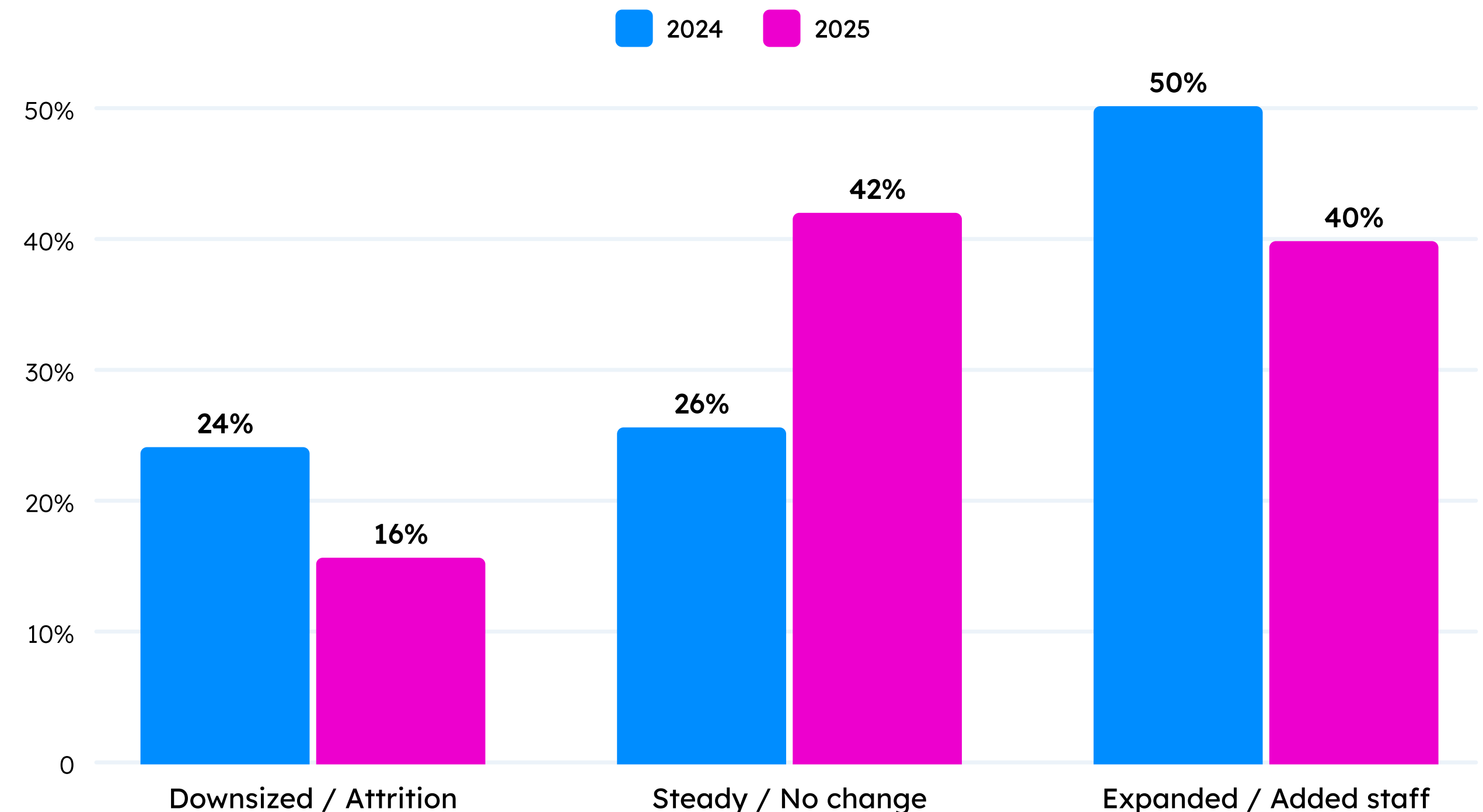
16% cutting headcount

40% increasing headcount

" What I am hearing from my peers is: How do you allocate resources when budgets are tight? You're getting asked to scale up for more personalized relevance across all stages of the buyer journey. You have to do everything and be everywhere. At the same time, you may not have as much budget.

Maryel Roman
Head of Digital Demand
Adobe APAC

How have your marketing team's staffing levels changed over the past year?

■ 2024 ■ 2025

	Downsized / Attrition	Steady / No change	Expanded / Added staff
2024	24%	26%	50%
2025	16%	42%	40%

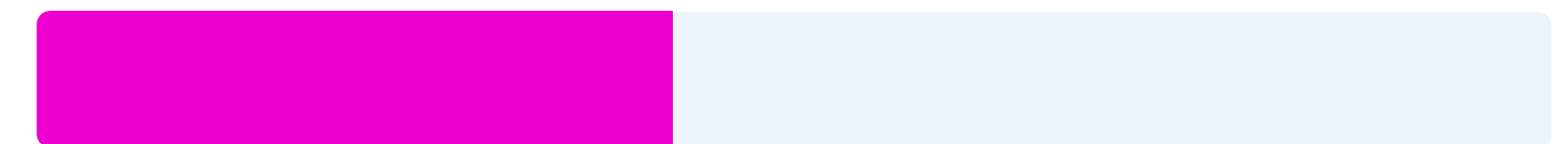**Findings: Economic Uncertainty** · **Regional**

Regional Constraints

REGIONAL INSIGHT

APAC and UK/Europe companies report more robust marketing budgets this year, with 42% of UK/Europe companies and 39% in APAC seeing increases in 2025 vs. 32% of US companies.

- Despite this disparity, US marketers are more likely to be highly confident in their marketing strategies, with 16% rating their strategies as "exceptional" versus 12% in UK/Europe and only 8% in APAC.

- Goal achievement is also higher in the US: Compared to 47% in the US, more than half of companies in Europe/UK (52%) and APAC (54%) report only "some, limited, or no" progress on their goals.

- Companies in Europe/UK and APAC may be bolstering spending to close performance gaps. Frustrations with technology outside the US may also explain these discrepancies: 56% of respondents in Europe/UK and 61% in APAC describe their technology stacks as "limited" or "disorganized" compared to just 46% in the US (see "Leveraging Technology, Data, and Content" section, below).

Robust marketing budgets

UK/Europe (42%)

US (32%)
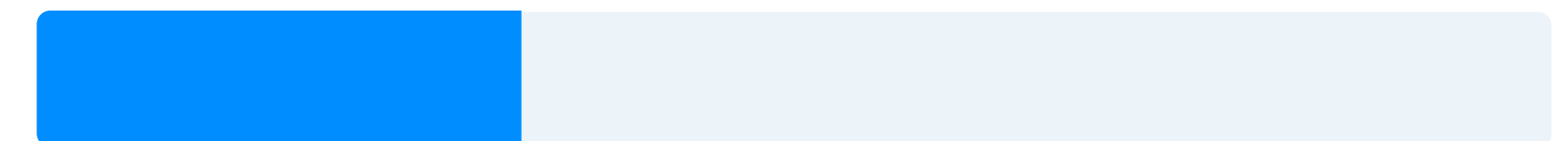
APAC (39%)

Pipeline360

Findings: Economic Uncertainty **Regional**
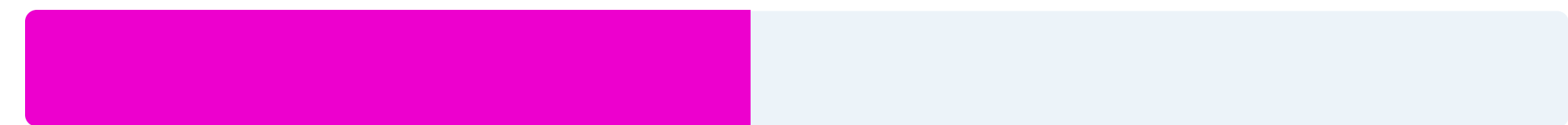
Regional Constraints

REGIONAL INSIGHT

That said, most challenges are shared.

Economic uncertainty dominates as the primary concern for marketers worldwide, cited by 41% of US respondents, 47% of UK/Europe respondents, and 49% of APAC respondents. This global challenge is compounded by similar ordering of challenges — including engagement difficulties, longer sales cycles, and budget constraints — across all regions.

Economic uncertainty as primary concern

UK/Europe (47%)

US (41%)

APAC (49%)

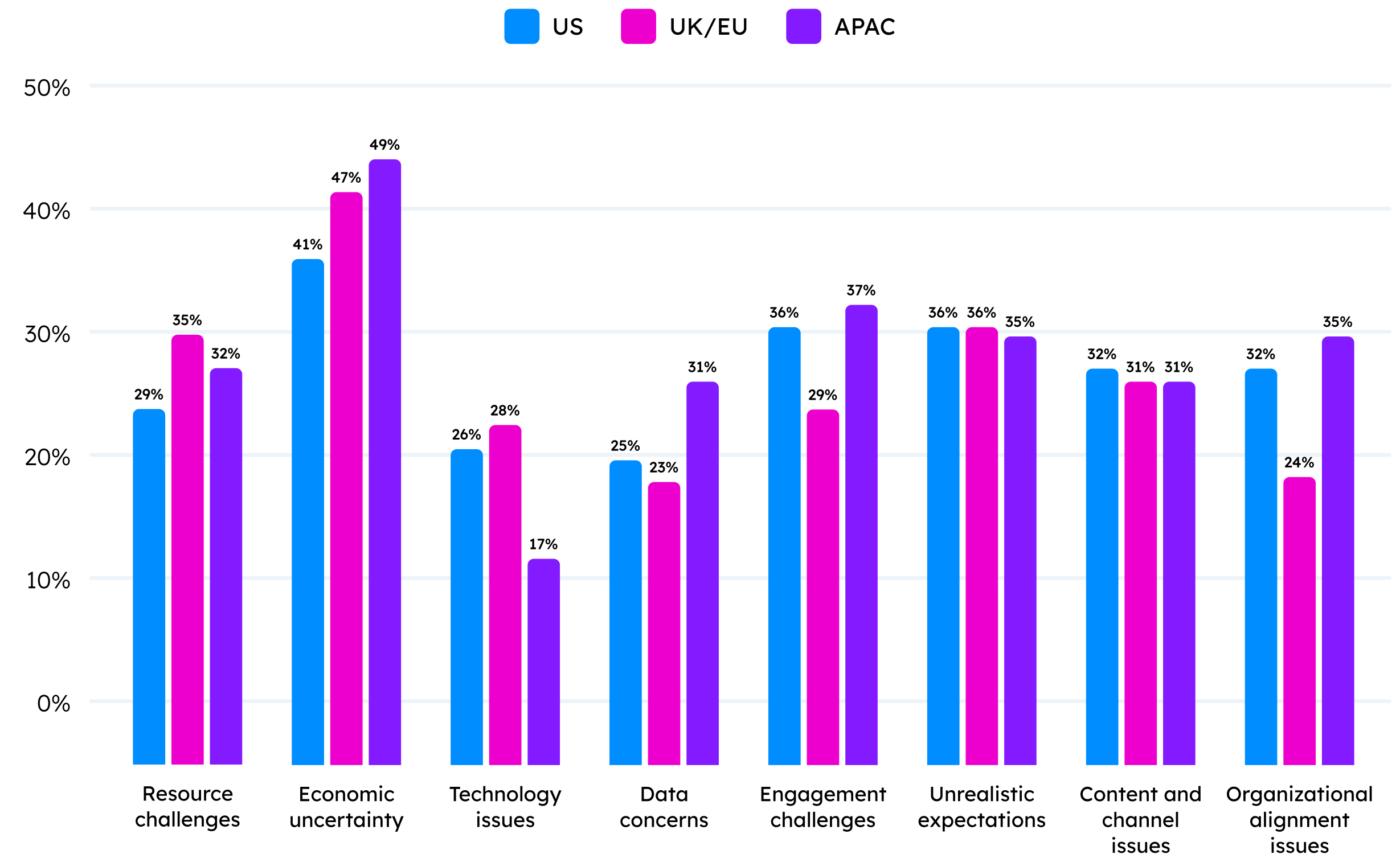**Findings: Economic Uncertainty** · **Regional**

Regional Constraints

REGIONAL INSIGHT

There are minor regional variations around secondary challenges.

- More teams in APAC (35%) face organizational and alignment issues vs. 24% in UK/Europe and 32% in the US

- Teams in Europe/UK are the most confident in their engagement levels, only 23% cite this as a top challenge. This reinforced several data points that showed Europe/UK teams as most committed to deep campaign performance and audience analysis, suggesting a more research-driven approach to overcoming challenges.

- Meanwhile, companies in APAC (17%) are the least likely to cite technology issues as a top challenge, though as we'll see this is likely because other challenges are more pressing, not because the region sees high levels of satisfaction with their tech/data stacks

- Indeed, companies in the APAC region are the most likely to cite data concerns as a top challenge (31% vs. 23% in the UK and Europe and 25% in the US)

What are the top 3 challenges you are facing right now in marketing?

Legend: US · UK/EU · APAC

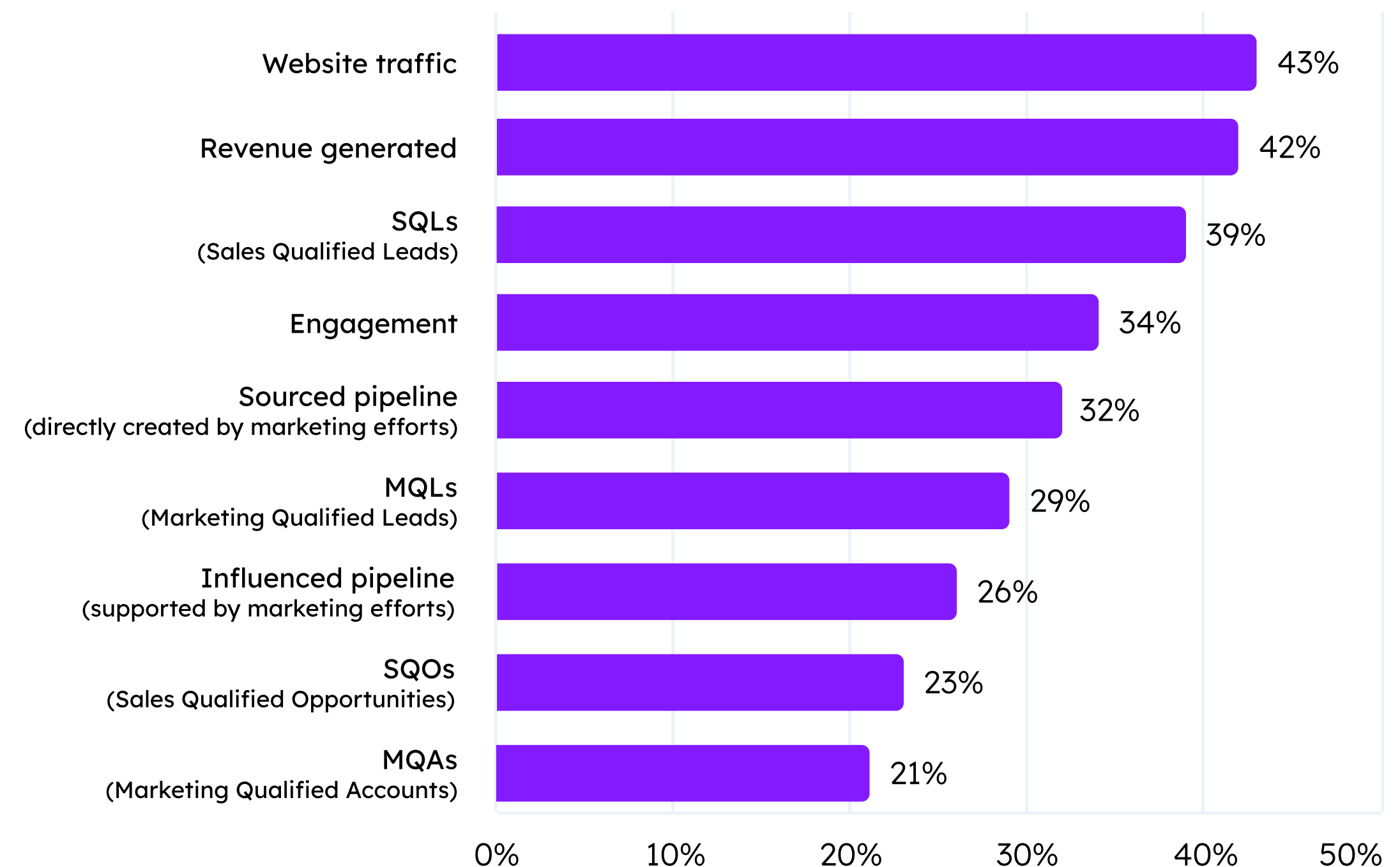| Challenge	US	UK/EU	APAC
Resource challenges	29%	35%	32%
Economic uncertainty	41%	47%	49%
Technology issues	26%	28%	17%
Data concerns	25%	23%	31%
Engagement challenges	36%	29%	37%
Unrealistic expectations	36%	36%	35%
Content and channel issues	32%	31%	31%
Organizational alignment issues	32%	24%	35%

Findings: Economic Uncertainty

Uncertainty leads to shifts in KPI

PERFORMANCE MARKETING FOCUS

As a result of this combination of pressures and crunched resources, B2B marketers have become decidedly pragmatic, valuing measurable results and top line impact above all else.

The most widely-used metrics show that marketers recognize the value of both brand awareness and demand generation activities, and understand they work in concert rather than in isolation

Which lead generation channels does your company currently use?

Channel	%
Website traffic	43%
Revenue generated	42%
SQLs (Sales Qualified Leads)	39%
Engagement	34%
Sourced pipeline (directly created by marketing efforts)	32%
MQLs (Marketing Qualified Leads)	29%
Influenced pipeline (supported by marketing efforts)	26%
SQOs (Sales Qualified Opportunities)	23%
MQAs (Marketing Qualified Accounts)	21%

TOP KPIS FOR MARKETING TEAMS:

Website traffic (43%) remains important for measuring top-of-funnel activity

Revenue generated (42%) has risen to become a top KPI for B2B marketing teams

SQLs (39%) bridge the gap between marketing and sales metrics

" In B2B, all marketing is performance marketing today. Whether it's the CFO, CEO, or CMO — everybody's simply looking for ROI, and that has radically shifted how B2B marketing operates.

Tony Uphoff
CEO
Pipeline360

Findings: Economic Uncertainty

High Performers' KPIs

High-performing teams prioritize revenue metrics, with 50% using revenue generated as their primary KPI
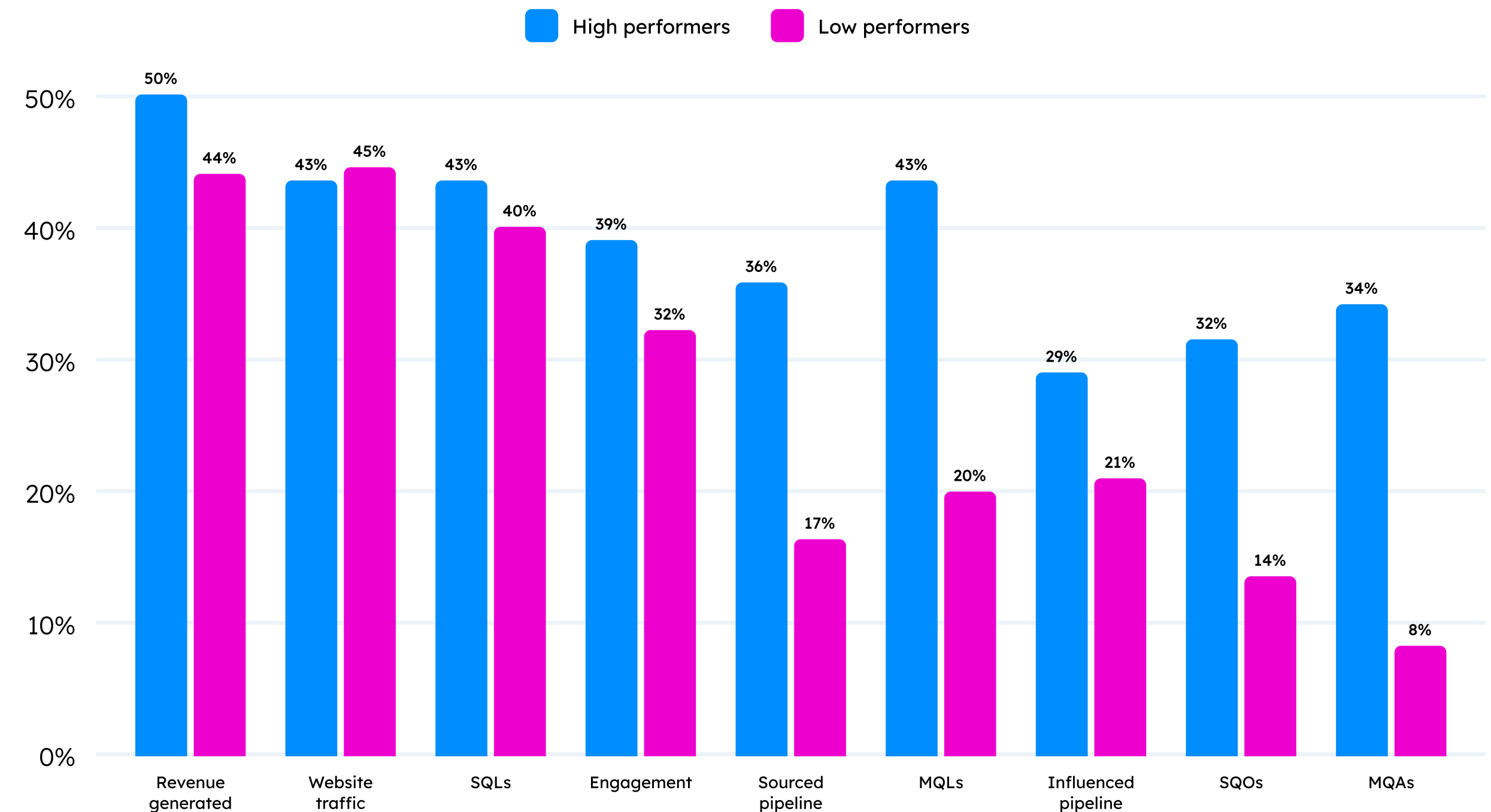
High performers:

• Track more top KPIs overall (an average of 3.5 vs. 2.4 for low performers).

• More likely to track MQLs (43% vs. 20% for low performers)

• More likely to track marketing-sourced pipeline (36% vs. 17%)

High performers aren't abandoning traditional metrics but complementing them with outcome-oriented measures.

B2B marketing leaders highlight the importance of reevaluating metrics.

### Which performance metrics do your marketing and sales teams most frequently use?

■ High performers   ■ Low performers

Metric	High performers	Low performers
Revenue generated	50%	44%
Website traffic	43%	45%
SQLs	43%	40%
Engagement	39%	32%
Sourced pipeline	36%	17%
MQLs	43%	20%
Influenced pipeline	29%	21%
SQOs	32%	14%
MQAs	34%	8%

Findings: Economic Uncertainty

Goal Achievement

GOAL ACHIEVEMENT STATUS

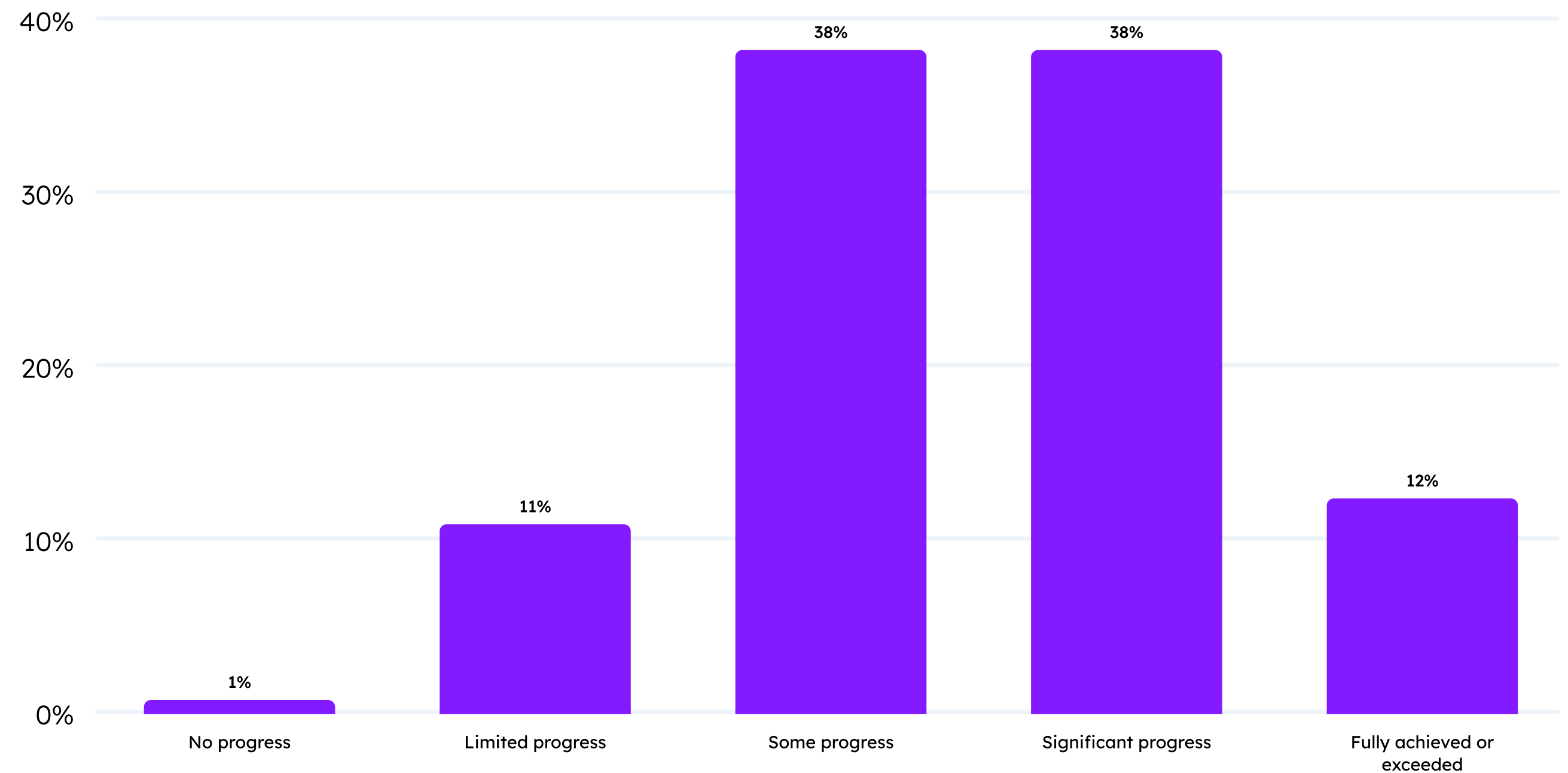**B2B marketers show mixed results in meeting targets:**

50%
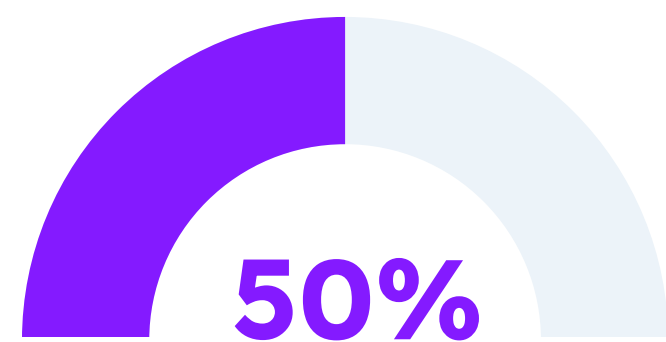
Only 50% of marketers report significant progress or fully-achieved goals in 2024

The other 50% fall short of their targets

This polarization reflects the widening gap between high and low performers we'll explore in the remainder of this study

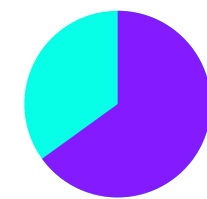### To what extent was your team able to meet its goals in 2024?

Category	Value
No progress	1%
Limited progress	11%
Some progress	38%
Significant progress	38%
Fully achieved or exceeded	12%

Findings: Economic Uncertainty

Goal Achievement Analysis

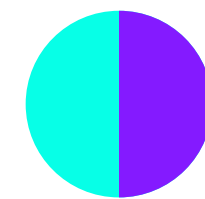**Performance differences amplify resource disparities:**

4x

High performers are 4× more likely to meet or exceed goals

65%

Success attracts further investment (65% of high performers see budget increases)

50%

Falling short leads to resource constraints (50% of low performers face budget cuts)

This creates high stakes for marketing leaders: today's performance directly impacts future resources, making improvement strategies increasingly urgent for teams currently falling behind.

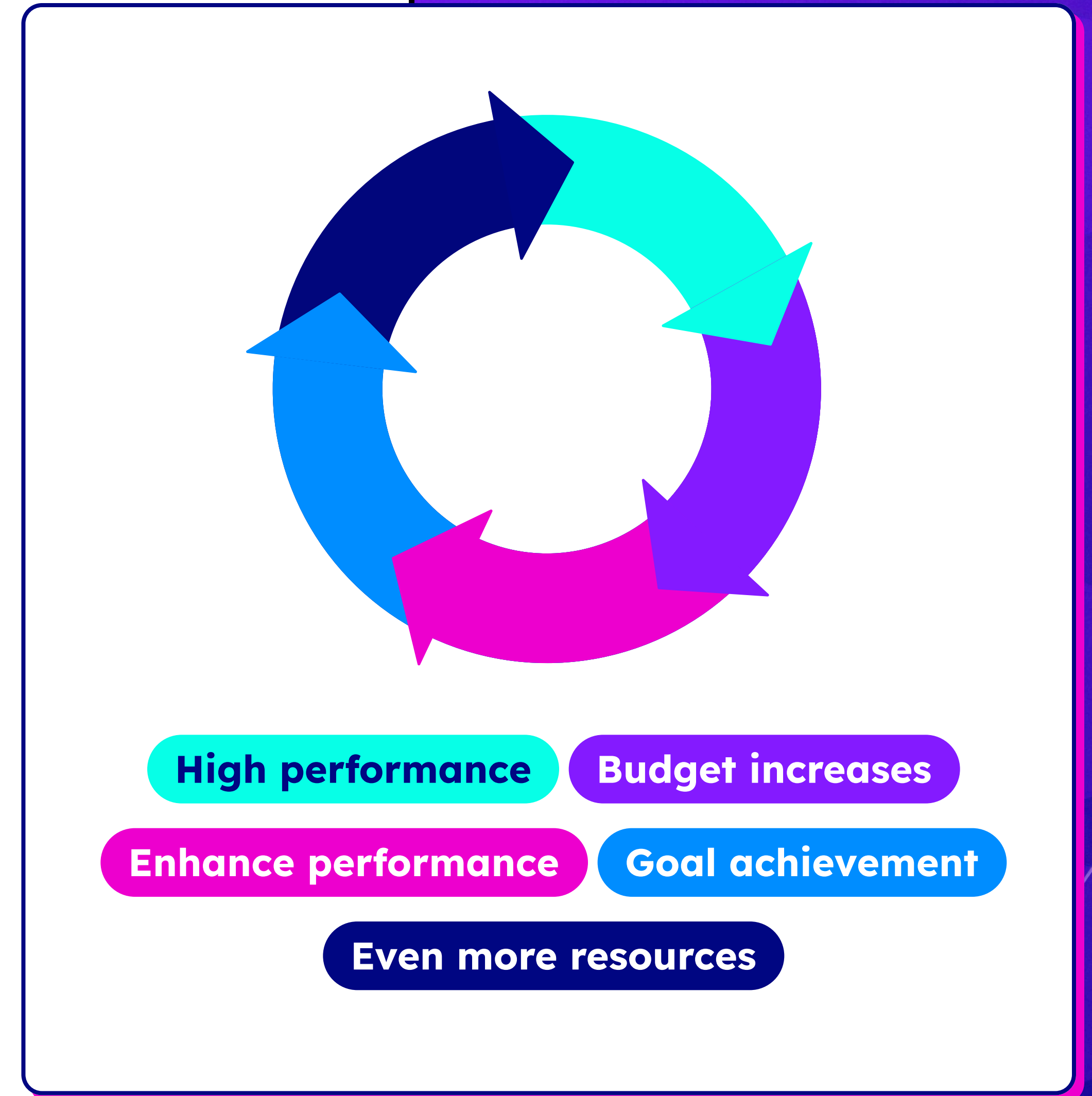**Findings: Economic Uncertainty**   **Deep Insight**

The Performance-Budget Cycle

THE PERFORMANCE-BUDGET FEEDBACK LOOP

Our data reveals a concerning self-reinforcing cycle that widens the gap between high and low performers.

High-performing teams are significantly more likely to receive budget increases (65% vs. 12% of low performers), while low performers face disproportionate cuts (50% vs. 15% of high performers). This creates path dependency where today's performance directly impacts future resources, raising the stakes for marketers already under pressure.

Breaking this cycle requires demonstrating revenue impact to secure future investments, making the shift to outcome-oriented KPIs crucial for struggling teams.

High performance
Budget increases
Enhance performance
Goal achievement
Even more resources

Core Challenges

2025 State of B2B Pipeline Growth: How B2B Marketers Are Navigating Uncertainty

Findings: Core Challenges

Buyer behavior

THE LENGTHENING B2B SALES CYCLE

74% of respondents report lengthening sales cycles:

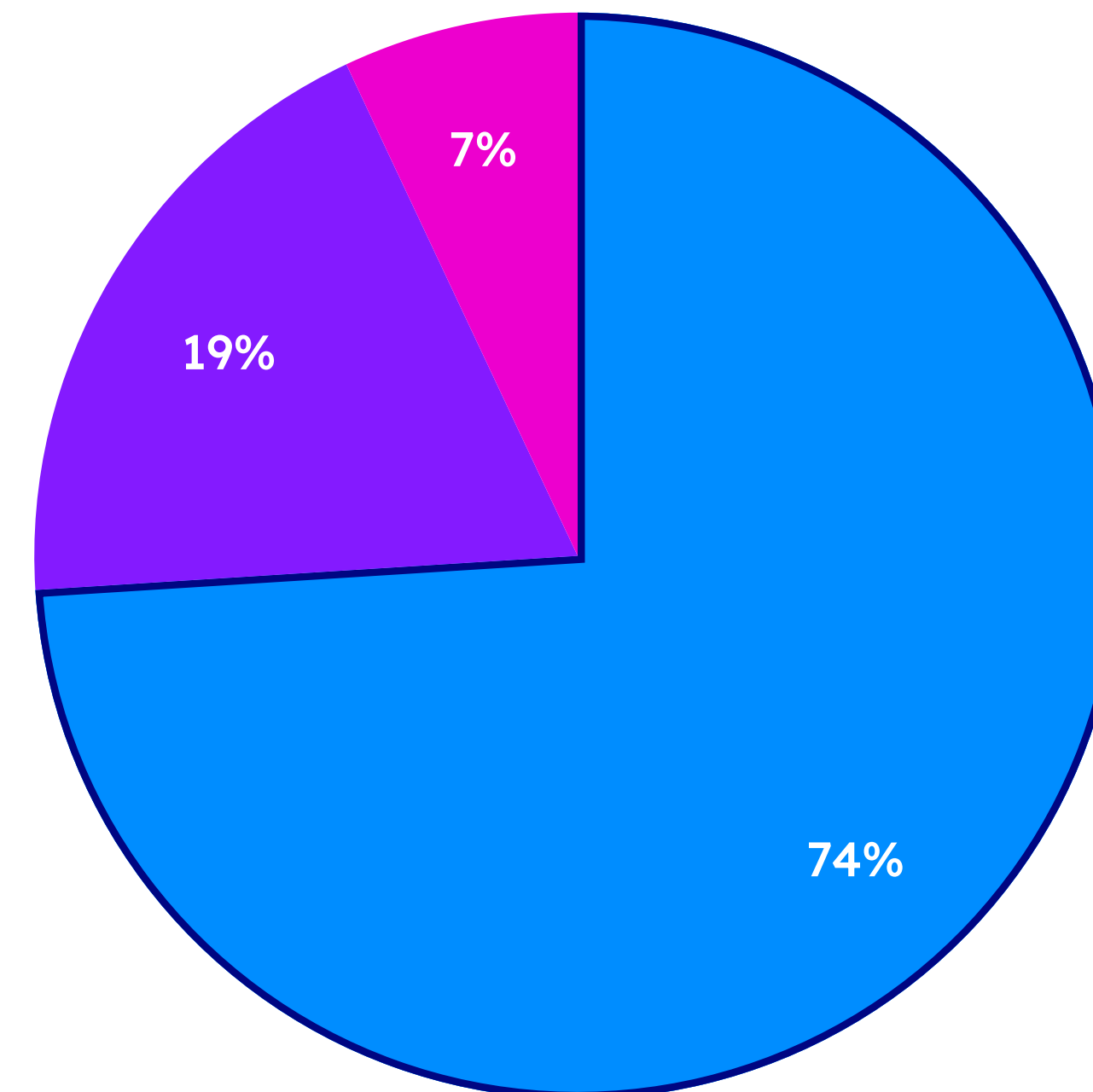**28%**   slight increase (0-2 months)

28%   moderate increase (2-4 months)

13%   significant increase (4-6 months)

5%   drastic increase (6+ months)

Have you seen the length of the sales cycles at your company increase in the past year?

■ Yes   ■ No   ■ Not Sure

7%

19%

74%

2025 State of B2B Pipeline Growth: How B2B Marketers Are Navigating Uncertainty

Findings: Core Challenges

Buyer behavior – Why sales are lengthening

" Sales cycles get longer for two reasons, predominantly. One, there are more people involved in buying decisions. Quite often now, particularly in technology, there can be up to 20 people involved in a buying decision. The second thing is short-termism. People are holding off on software investments that support long-term best interests because they're so focused on costs in the short term.

Fiona McKenzie
CEO
Revere Agency

Why sales cycles are lengthening:

1 Larger buying groups (up to 20 stakeholders)

2 Short-term cost focus delaying investments

3 New stakeholders (especially Finance) entering late in buying process

Findings: Core Challenges

Buyer behavior – New personas

Buying groups aren't just growing larger, they're also composing new personas, meaning marketers must understand the concerns of emerging stakeholders beyond their core buyer.

" At Adobe, we traditionally sell to marketing and IT, and are heavily geared towards marketing buyers. But now other stakeholders' feedback comes in, especially towards the end of that buying cycle, from more and more functions that we don't typically market to. On the buyer side, finance in particular is getting more involved. These new stakeholders pop up and have actual power to shape or close a deal, and sometimes even say no to a deal.

Maryel Roman
Head of Digital Demand
Adobe APAC

Findings: Core Challenges   **Regional**

Regional Insight

Sales cycle lengthening is most pronounced in UK/Europe (78%) where more than three-fourths of companies see longer sales cycles compared to APAC (73%) and US (70%), likely reflecting slow economic growth, austerity policies, and heightened economic uncertainty that marked European markets over the second half of 2024 and beginning of 2025.

Sales cycle lengthening

UK/Europe (78%)

US (70%)

APAC (73%)

Findings: Core Challenges   **Deep Insight**

The Non-linear Buyer Journey

THE EVOLVING B2B BUYER JOURNEY

The modern B2B buyer journey has fundamentally transformed from a linear funnel to a complex, collective decision process in which stakeholders influence each other through parallel research and evaluation paths. As buying groups expand to 10-20 stakeholders and sales cycles stretch 4-6 months longer, prospects may remain in-funnel for extended periods, advancing unevenly, falling off and resurfacing multiple times.

As marketing teams struggle to adjust to this reality, the highest-performing teams are using a wider range of KPIs and lead-generation channels. They are identifying, engaging, and nurturing buyers more effectively in the funnel.
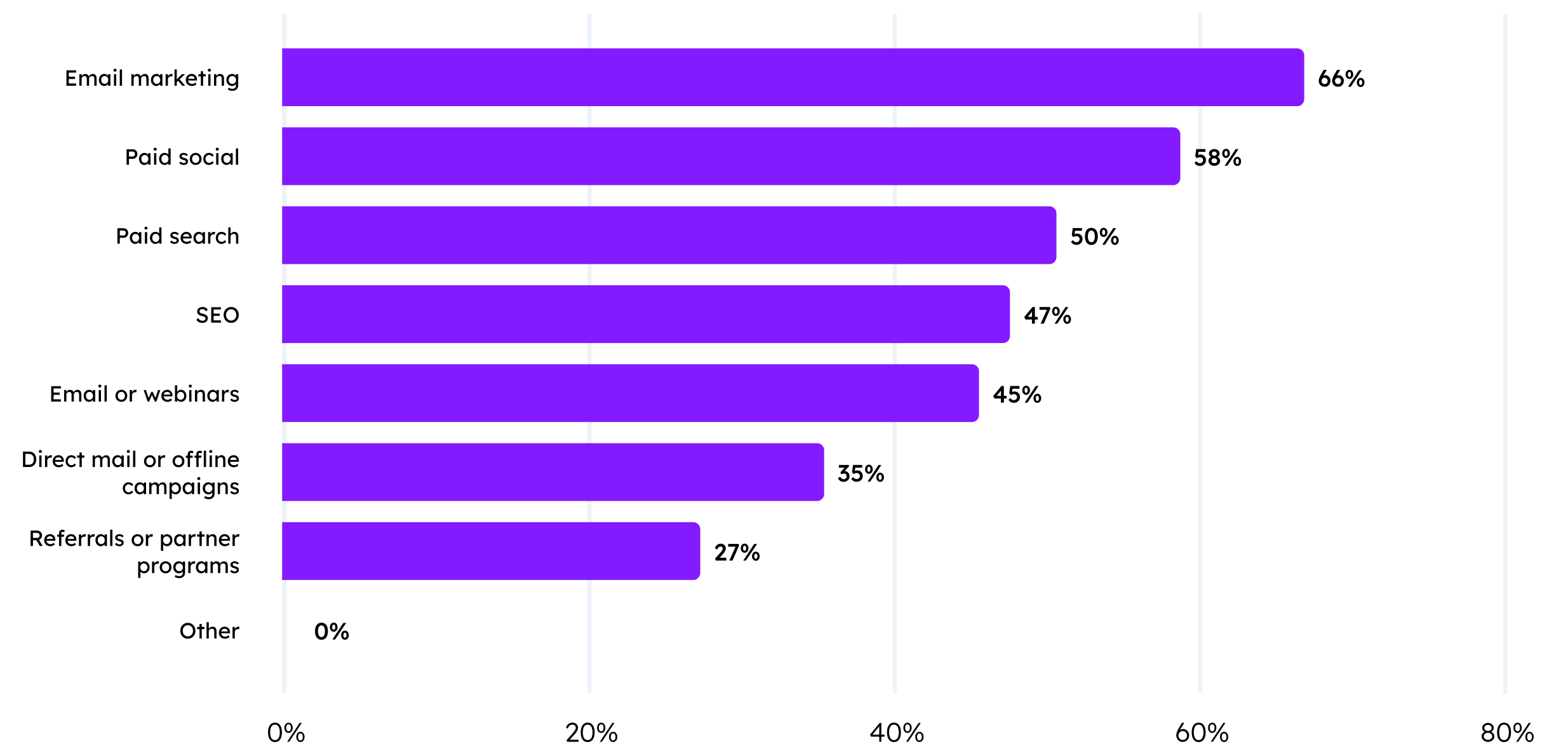
Findings: Core Challenges

Lead generation

LEAD GENERATION TACTICS

The most-commonly used lead generation channels include:

- Email marketing (66%, up from 63% in July 2024)
- Paid social (58%)
- Paid search (50%)
- SEO (47%)
- Events and webinars (45%)

Email's dominance reflects its cost-effectiveness during uncertain times and independence from ad tech and big tech platforms' pricing power. Also: its ability to maintain regular contact with leads throughout extended sales cycles.

Which lead generation channels does your company currently use?

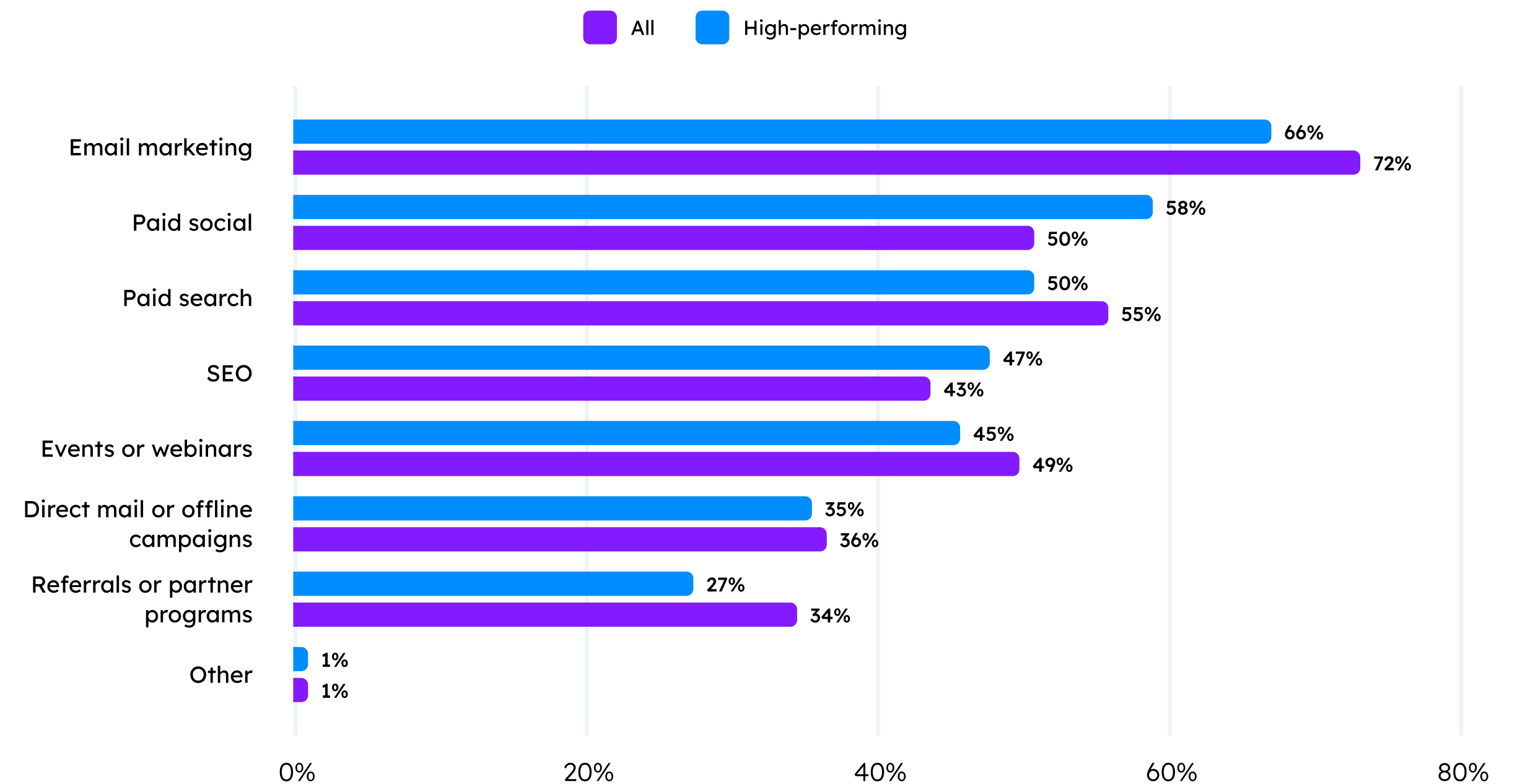| Channel	Percentage
Email marketing	66%
Paid social	58%
Paid search	50%
SEO	47%
Email or webinars	45%
Direct mail or offline campaigns	35%
Referrals or partner programs	27%
Other	0%

Findings: Core Challenges

Top performers in lead generation

HIGH PERFORMER ADVANTAGE

Channel prioritization is similar for low vs. high performers, so effectiveness isn't driven by channel selection. But high performers lean on email even more and employ more diverse channel strategies:

- Even more likely to use email: 72%

- More likely to use referral/partner programs (34% vs. 27% of all teams and 19% of low performers)

- More likely to employ direct mail and offline tactics (36% vs. 35% of all teams and 26% of low performers)

Which lead generation channels does your company currently use? (select all that apply)

Legend: All (purple) · High-performing (blue)

Channel	High-performing	All
Email marketing	66%	72%
Paid social	58%	50%
Paid search	50%	55%
SEO	47%	43%
Events or webinars	45%	49%
Direct mail or offline campaigns	35%	36%
Referrals or partner programs	27%	34%
Other	1%	1%

Findings: Core Challenges   **Regional**

Lead generation

REGIONAL INSIGHT

The preference for email marketing as the primary lead generation channel is remarkably consistent (US: 65%, UK/Europe: 67%, APAC: 65%), reflecting the channel's enduring effectiveness despite regional variations in digital adoption and regulatory environments.

Email marketing as primary lead generation channel

UK/Europe (67%)

US (65%)

APAC (65%)

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Findings: Core Challenges

Audience engagement

### REACHING AND ENGAGING TARGET AUDIENCES

55% of companies express dissatisfaction with their ability to target and engage key audiences and buying groups:

38% believe they could be "more impactful"

15% only occasionally reach targets

2% often fail completely in reaching targets

How would you rate your company's ability to reach its target audience or buying groups?
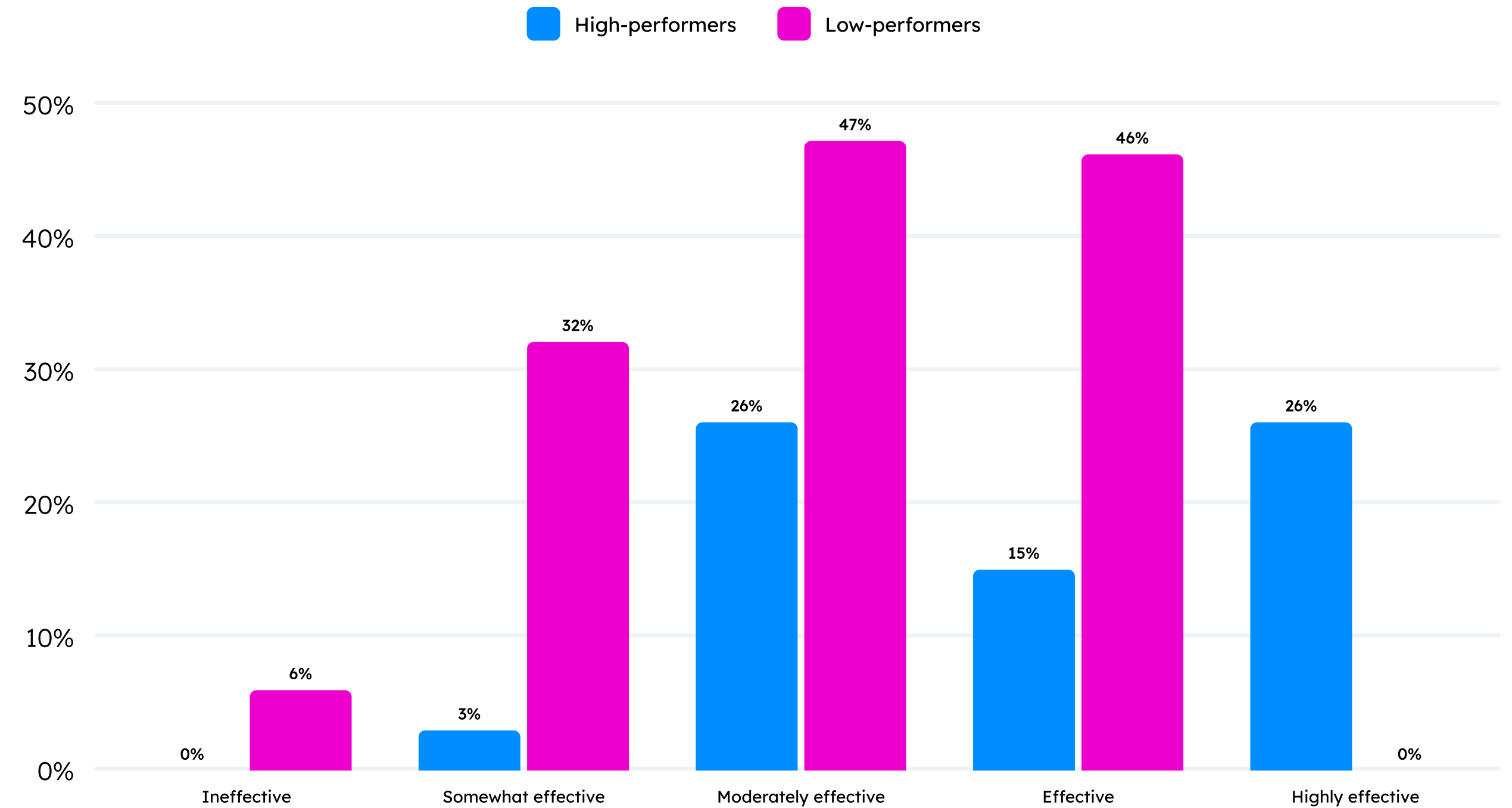
Ineffective	Somewhat effective	Moderately effective	Effective	Highly effective
2%	15%	38%	34%	11%
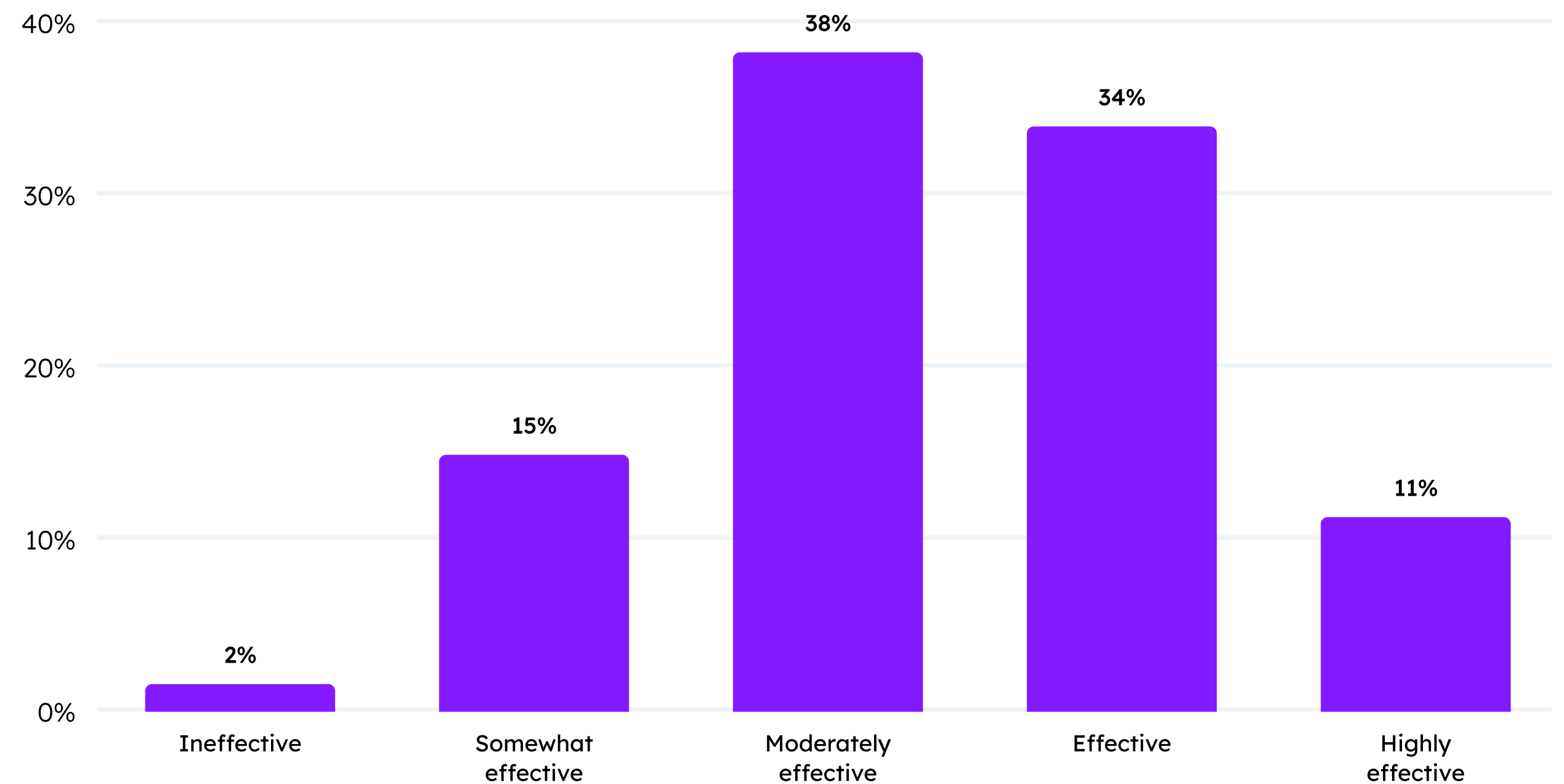
Findings: Core Challenges

Audience engagement performance gap

60-point performance gap:
72% of high performers report effective target audience/buyer reach and engagement vs. just 15% of low performers.

How would you rate your company's ability to reach its target audience or buying groups?

■ High-performers   ■ Low-performers

	Ineffective	Somewhat effective	Moderately effective	Effective	Highly effective
High-performers	0%	3%	26%	15%	26%
Low-performers	6%	32%	47%	46%	0%

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Findings: Core Challenges

Engagement improvement

A NEED FOR MORE GRANULAR INSIGHTS AND SEGMENTATION

Top areas for improvement:

55% Customer insights gathering

46% Audience segmentation

43% Buyer persona development

37% Vertical targeting, or industry-specific insights and messaging

Marketers see a need to develop a richer and more granular understanding of the customer or potential customer, based on industry and buyer personas (which, as we already saw, today tend to include new personas and customer profiles that marketers must quickly familiarize themselves with).

High performers overindex on demands for more:

BUYER PERSONA DEVELOPMENT

52%

of high performers say this would improve their ability to reach target groups vs. 38% of low performers

BUYER PERSONA DEVELOPMENT

42%

vs. 27% of low performers

> "Understanding the ICP means not just the one person that holds the ticket to sign the contract, but all the influencers around that deal.

Deb Wolf
CMO
Dataminr

Pipeline**360**

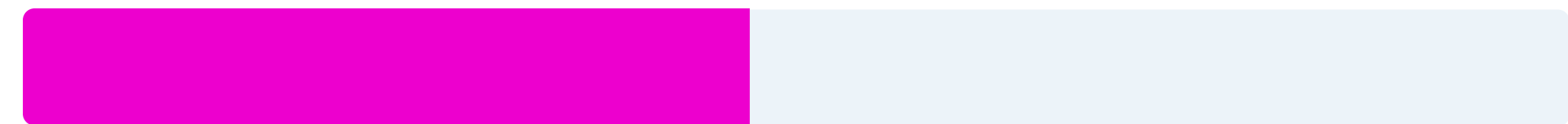**Findings: Core Challenges** · **Regional**

APAC Engagement challenges

REGIONAL INSIGHTS

APAC marketers are least confident in audience/buying group reach and engagement, with only 36% feeling effective vs. 46% in US and 47% in UK/Europe.

Confidence in audience/buying group reach and engagement

UK/Europe (47%)

US (46%)

APAC (36%)

Findings: Core Challenges

Buying group identification

IDENTIFYING INDIVIDUAL BUYERS IN GROUPS & COMMITTEES

53% see room for improvement in identifying individuals in buying groups:

- 11% "extremely effective"
- 34% "very effective"
- 32% "somewhat effective"
- 16% "slightly effective"
- 5% no process at all

5%

11%

16%

34%

32%

Extremely effective   Very effective
Somewhat effective   Slightly effective
No process at all   Other
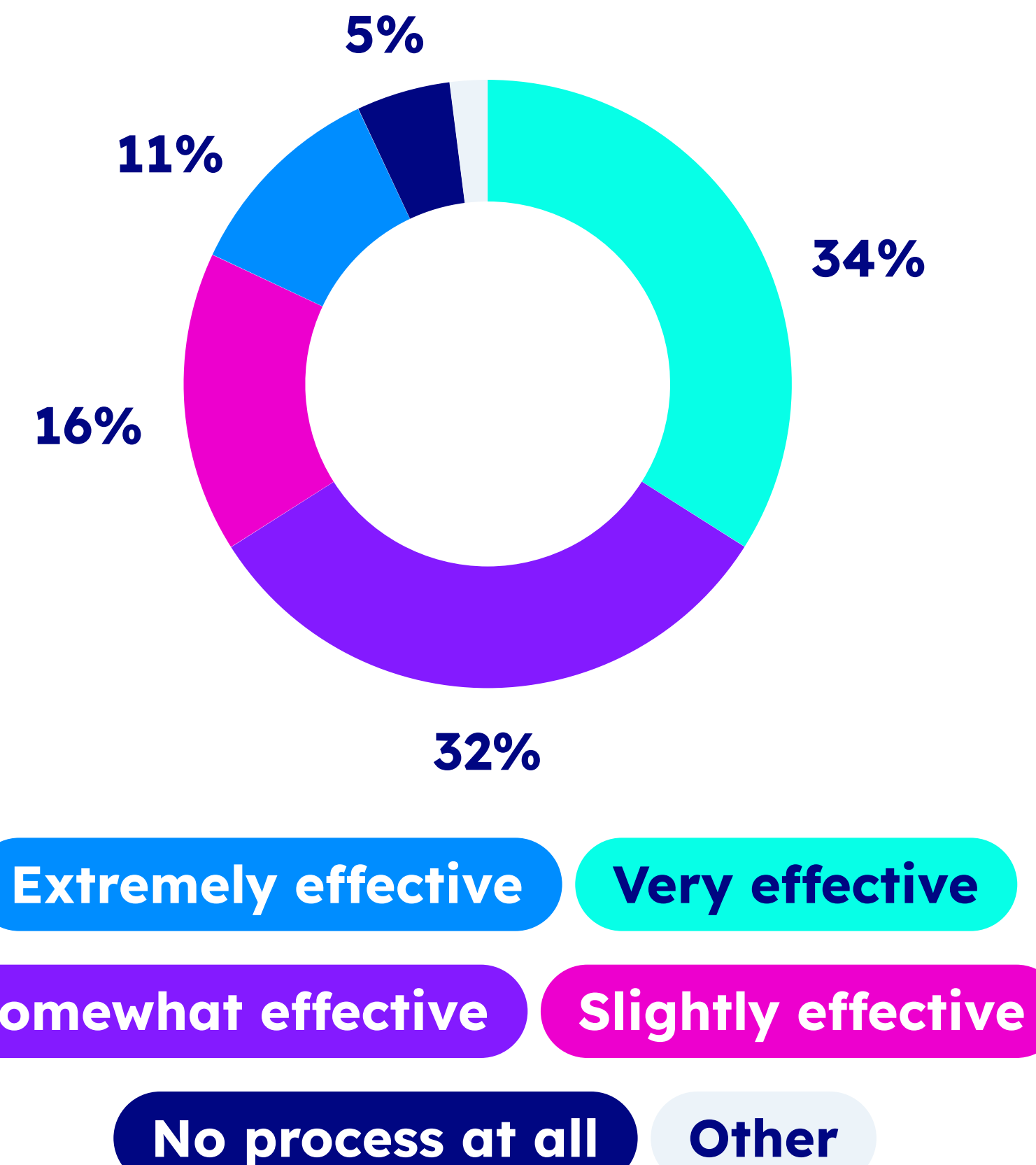
Findings: Core Challenges

Buying group identification

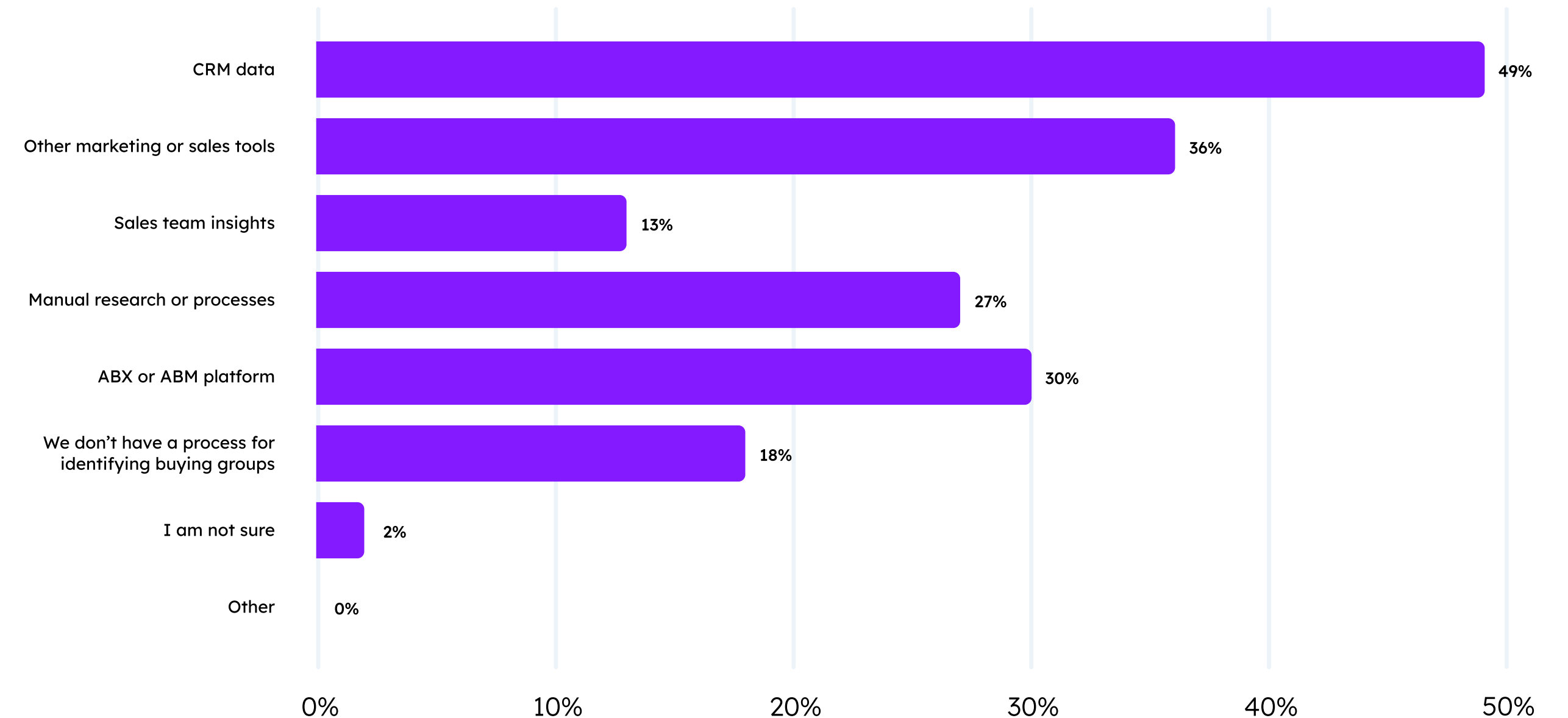**HOW B2B MARKETERS IDENTIFY INDIVIDUALS IN BUYING GROUPS**

Methods for identifying buyers:

- 53% rely on CRM data

- 37% incorporate sales team insights

- 43% use "other marketing or sales tools" defined as intent data platforms and lead-enrichment tools

- 33% leverage manual research/processes

This analysis reveals two clear gaps:

- Only 37% of teams incorporate sales team insights, meaning a majority (63%) do not formally collect intelligence and knowledge on buyers from sales. This is a major gap in B2B marketers' communication with sales.

- A majority also do not rely on outside tools to complement internal data for identifying individuals, which means companies without rich internal data lack effective resources for identifying individual buyers

How does your team identify individuals within your buying groups or committees?

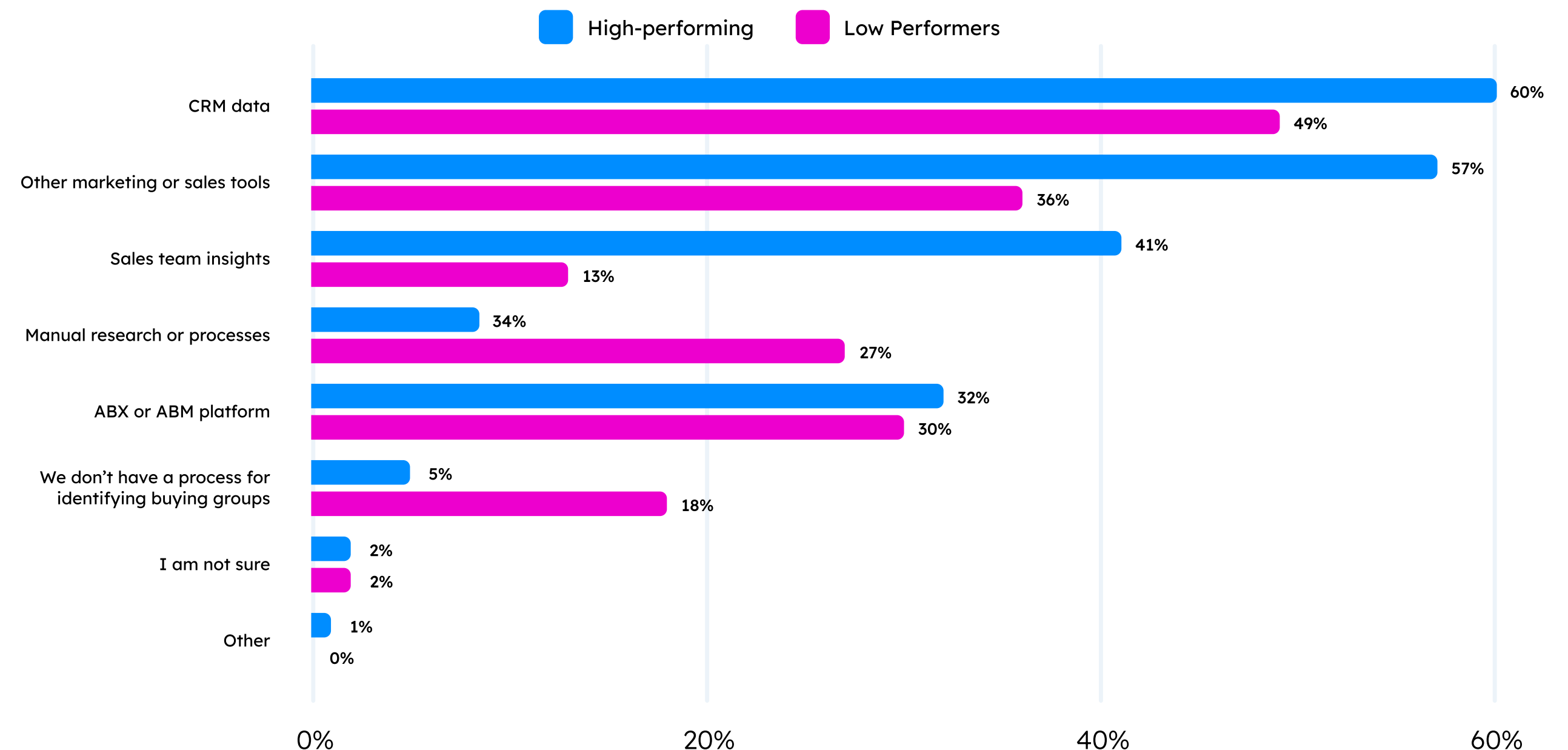| Category	Value
CRM data	49%
Other marketing or sales tools	36%
Sales team insights	13%
Manual research or processes	27%
ABX or ABM platform	30%
We don't have a process for identifying buying groups	18%
I am not sure	2%
Other	0%

Findings: Core Challenges

Buying group identification - High performers

High performers are more sophisticated and aligned:

- More likely to incorporate sales team insights (41%) vs. low performers (36%)

- 57% use outside tools like lead enrichment and intent data platforms vs. 27% of low performers

- As in other areas, high performers simply were more aggressive in trying several different options: on average high performers indicated the use of 2.3 methods for identifying individual buyers, vs. 1.7 for low performers.

How would you rate your company's ability to collect, analyze, and interpret data to refine marketing strategies and measure success?

■ High-performing   ■ Low Performers

Category	High-performing	Low Performers
CRM data	60%	49%
Other marketing or sales tools	57%	36%
Sales team insights	41%	13%
Manual research or processes	34%	27%
ABX or ABM platform	32%	30%
We don't have a process for identifying buying groups	5%	18%
I am not sure	2%	2%
Other	1%	0%

Findings: Core Challenges   **Regional**

Regional differences in identifying individuals

REGIONAL INSIGHTS

- APAC companies are less confident in identifying individuals in buying groups (32% are effective or very effective in this area) compared to UK/Europe (52%) and US (41%)

- To identify individual prospects, APAC marketers are also more likely to rely on CRM data (62% vs. 49% in US and 53% in UK/Europe)

- They are also more likely to use sales team insights (44% vs. 37% in UK/Europe and 33% in US)

This data suggests that APAC teams lead, while the US lags, in exploiting internal sources of intelligence like CRM data and the sales team for identifying individuals in buying groups. That said, only one-third of APAC teams feel they are effective in this area. The global data helps explain the seeming contradiction: one or two methods alone are not enough to successfully identify individual buyers. The key — especially in an area with massive buyer diversity like APAC — seems to be an aggressive leveraging of all possible options, including manual research, outside data enrichment platforms, and ABX/ABM tools.

Confidence identifying individuals in buying groups

UK/Europe (52%)

US (41%)

APAC (32%)
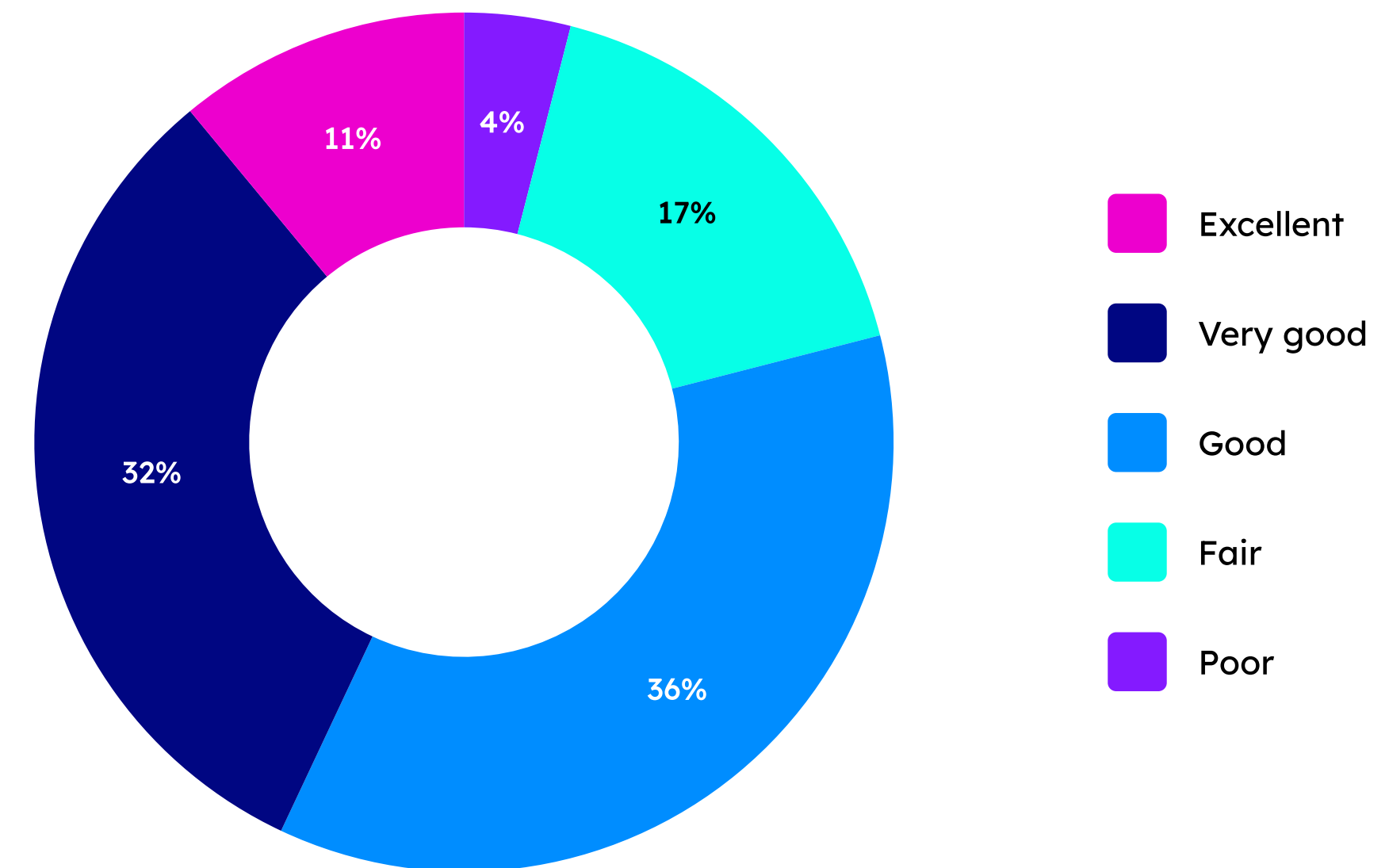
Findings: Core Challenges

Lead nurturing

LEAD NURTURING EFFECTIVENESS GAP

59% of B2B marketing teams detect performance gaps in nurturing capabilities:

- 41% rate lead nurturing as "very good" or "excellent"

- 36% describe nurturing as "good" but needing improvement

- 19% rate efforts as merely "fair"

- 4% consider them "poor"

How would you rate your company's ability to effectively manage and nurture leads to prepare them for the sales process?

- Excellent
- Very good
- Good
- Fair
- Poor

11% · 4% · 17% · 32% · 36%
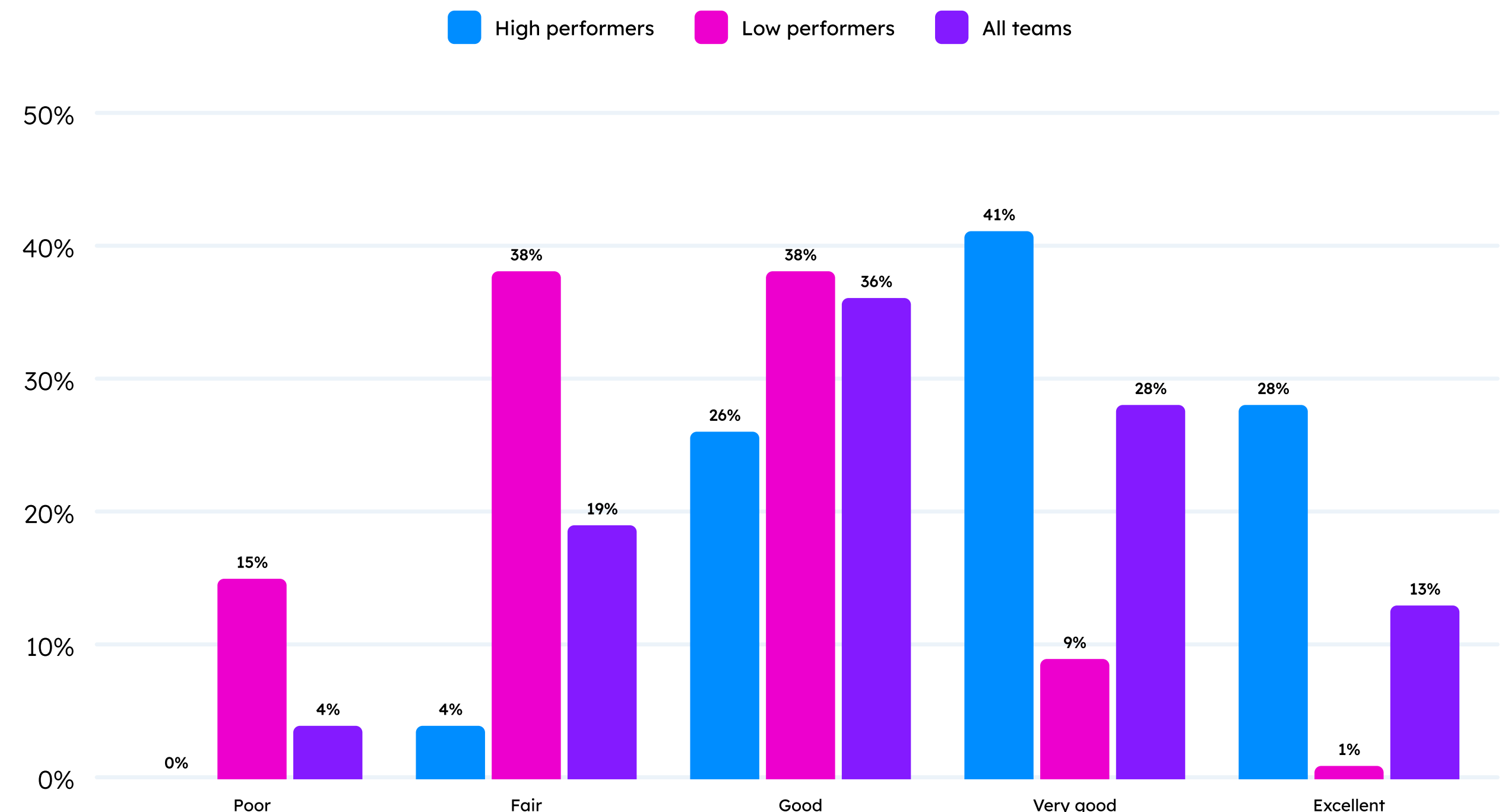
Findings: Core Challenges

Lead nurturing gap

High-performing teams showcase a 59-point advantage:

- 69% of high performers report being "very good" or "excellent" at nurturing leads

- Only 10% of low performers can say the same

This disparity suggests lead nurturing is highly correlated with goal achievement and outperformance of peers—likely through mechanisms like pipeline quality and lower funnel conversion rates.

Which of the following would most improve your company's ability to truly learn from and take action on your data?

Legend: High performers · Low performers · All teams

	Poor	Fair	Good	Very good	Excellent
High performers	0%	4%	26%	41%	28%
Low performers	15%	38%	38%	9%	1%
All teams	4%	19%	36%	28%	13%

Findings: Core Challenges

Improving lead nurturing

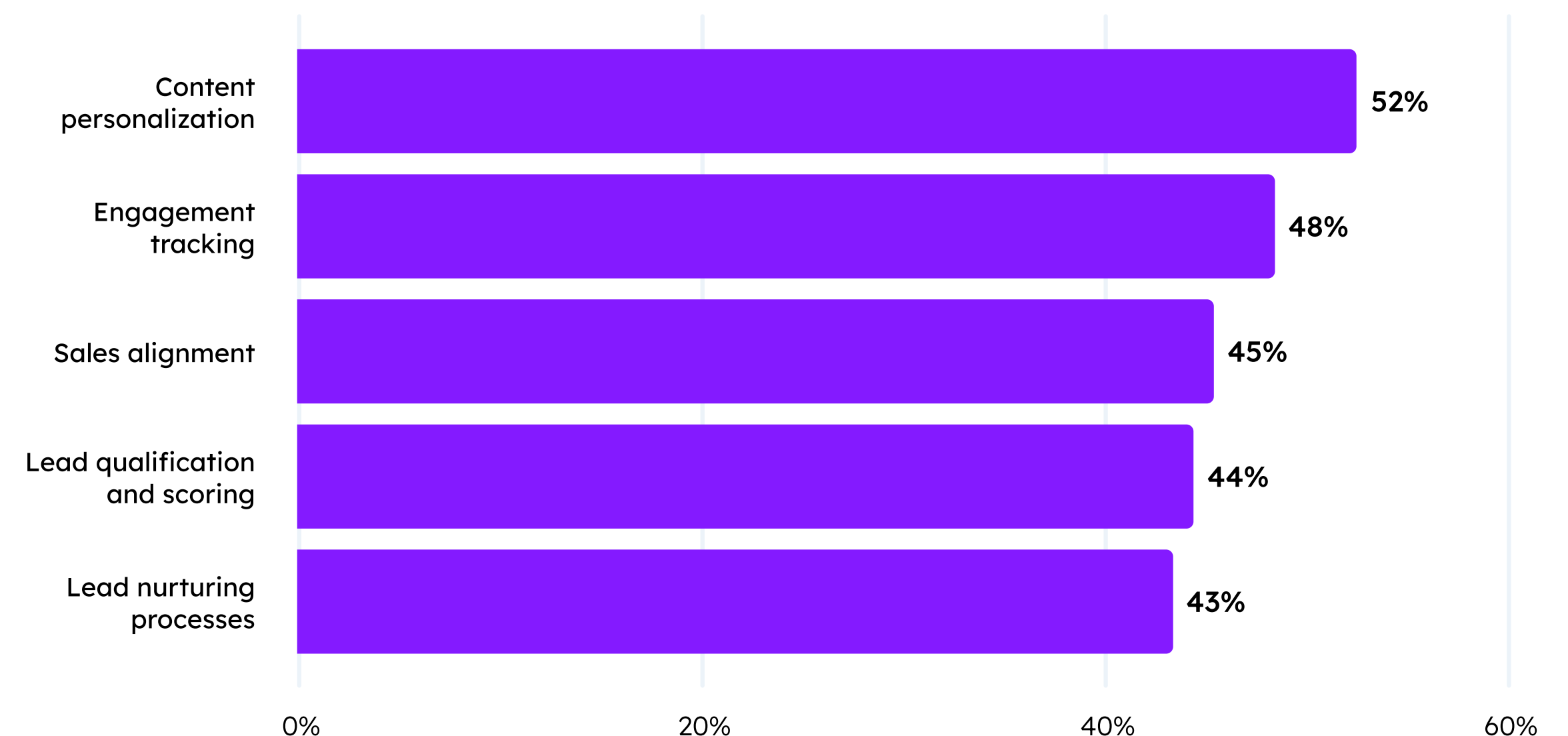## Top areas to improve lead nurturing and management:

- Data-driven content personalization (52%)
- Engagement tracking (48%)
- Better alignment with sales (45%)
- Improved lead qualification and scoring (44%)

With content driving nurture sequences, successful preparation of leads for the sales process requires an ability to personalize content at scale, which also implies having a deep well of assets to draw on. This is an opening for AI: as we'll see, when asked about promising AI applications, a plurality of respondents (36%) said they were most interested in its potential for content personalization.

But personalization alone is likely not enough: in all, five separate tactics for improving nurturing were flagged by 40% or more of respondents.

- Organizations also need better engagement tracking. With engagement challenges on the rise it becomes more important to capture every signal

- They also need more collaborative approaches that bridge traditional silos between marketing and sales

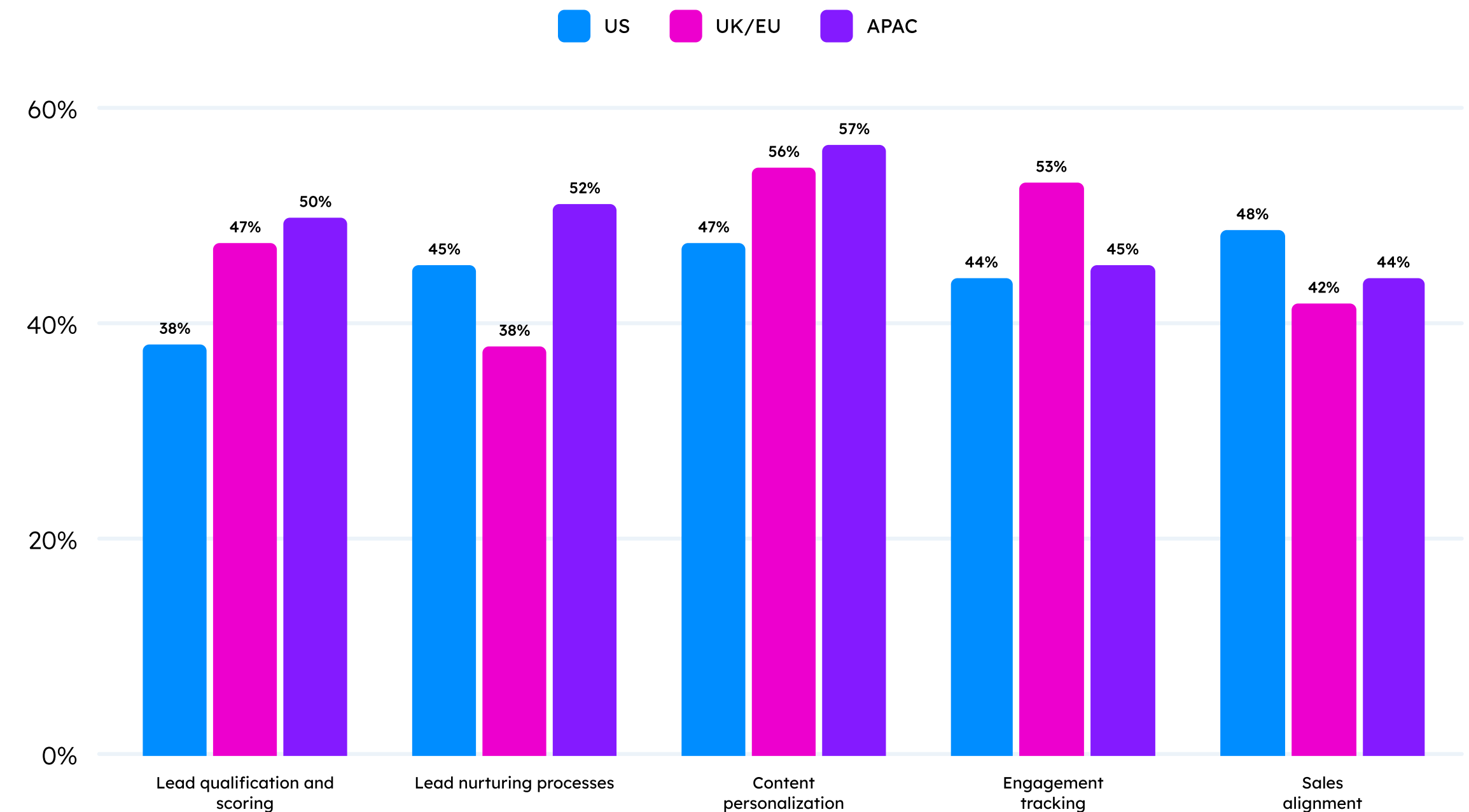### All vs. Which area do you believe would most improve your company's ability to effectively nurture your leads?

Area	Percentage
Content personalization	52%
Engagement tracking	48%
Sales alignment	45%
Lead qualification and scoring	44%
Lead nurturing processes	43%

Findings: Core Challenges   **Regional**

Regional lead nurturing

- US marketers feel significantly more confident in lead nurturing and management (15% rate it "excellent") vs. UK/Europe (13%) and APAC (8%)

- APAC and Europe/UK respondents see a need for improved lead qualification and scoring. Compared to 38% in the US, 47% of respondents in Europe/UK and 50% in APAC identify improved lead qualification and scoring as a top area for better nurturing.

- All regions ranked content personalization high as a first or second choice when choosing tactics to improve lead nurturing

- However, teams in UK/Europe (56%) and APAC (57%) were considerably more likely than peers in the US (47%) to cite content personalization as a tactic with promise to improve their efforts. It's possible that teams in the UK/Europe are earlier in their implementation of content personalization, including in leveraging AI, and would benefit from faster adoption.

Which area do you believe would most improve your company's ability to effectively nurture your leads?

Legend: US · UK/EU · APAC

	US	UK/EU	APAC
Lead qualification and scoring	38%	47%	50%
Lead nurturing processes	45%	38%	52%
Content personalization	47%	56%	57%
Engagement tracking	44%	53%	45%
Sales alignment	48%	42%	44%

Findings: Core Challenges   **Regional**

Funnel friction

**TOP POINTS OF FUNNEL FRICTION**

Two of the three leading drop-off points in the funnel occur at the end of the funnel, and all occur in areas shared with sales:

Most problematic funnel stages:

- Closing deals (38%)
- Retaining customers (38%)
- Qualifying leads (38%)
- Nurturing leads (34%)
- Generating leads (28%)

These friction points underscore why sales-marketing alignment is critical — the most challenging areas are precisely where collaboration is most needed.

Where in your funnel does your team encounter the most friction or drop-offs? (select all that apply)

Stage	Percentage
Qualifying leads	38%
Closing deals	38%
Retaining customers	38%
Nurturing leads	34%
Generating leads	28%
I am not sure	7%
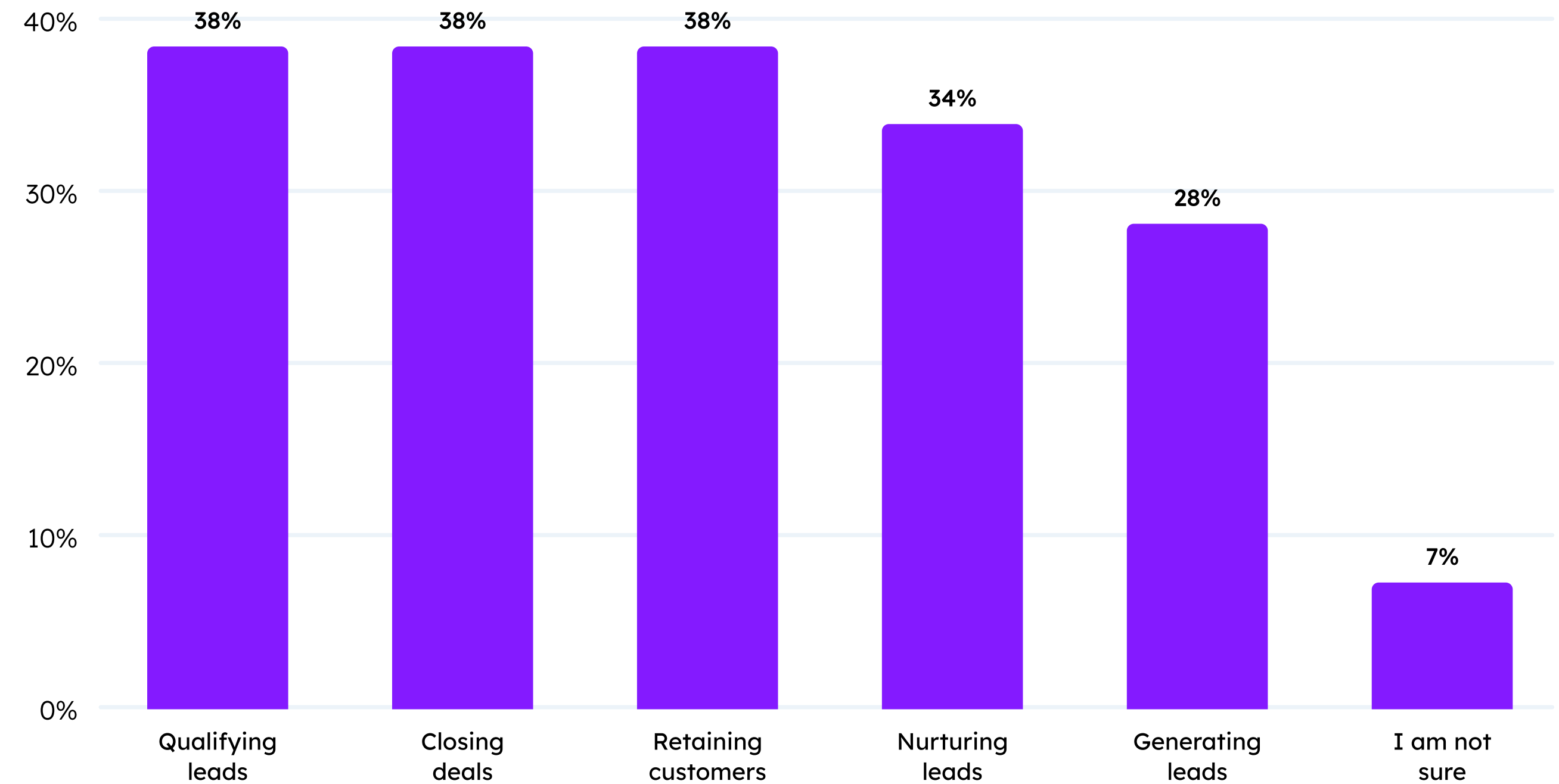
Findings: Core Challenges · **Deep Insight**

The bottom-of-funnel crisis

BOTTOM-OF-FUNNEL FRICTION

Our research reveals a striking pattern: B2B marketing teams are experiencing their greatest challenges precisely where sales and marketing responsibilities traditionally overlap. The most significant drop-off points all cluster around later funnel stages and where sales-marketing alignment is crucial: closing deals and retention (38%), qualifying leads (38%), and nurturing leads (34%). This isn't coincidental—it reflects the fundamental disconnect between how B2B buyers actually purchase today versus how most organizations structure their teams and processes (linear handoffs between marketing and sales). High performers have recognized this reality and restructured their approach around collaborative ownership of the entire customer journey.

> "The way we define pipeline is changing. It used to be very straight-line based— a lead became an inquiry, became a lead, became a sales qualified lead, became an opportunity. We know that just isn't how buyers are buying anymore. They're buying so much more in committee. You can't single-thread these deals anymore.

Deb Wolf
CMO
Dataminr

Sales marketing alignment

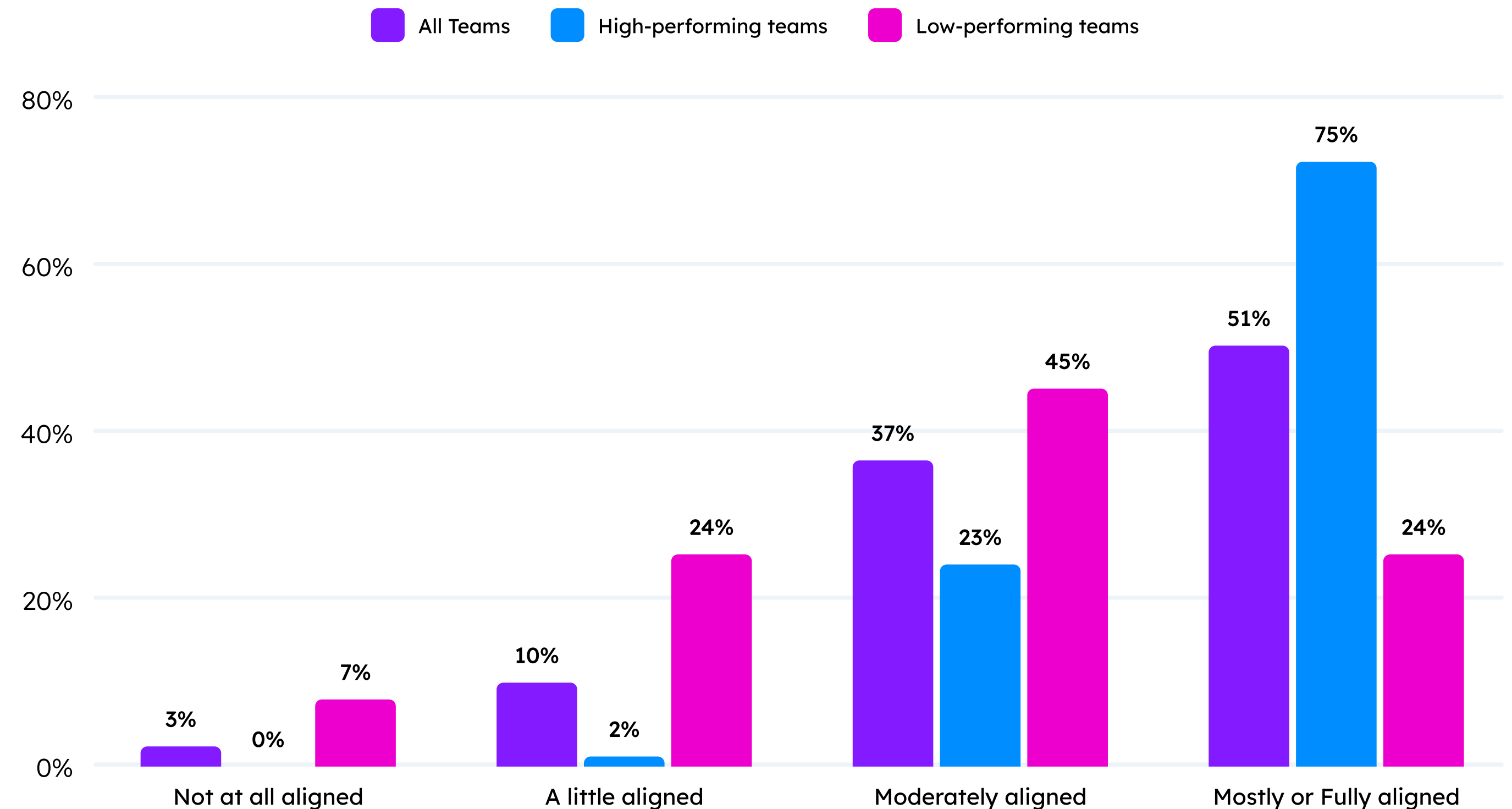**Findings: Sales Marketing Alignment**

Current state

SALES-MARKETING ALIGNMENT AS A CRITICAL PERFORMANCE DRIVER

Current alignment status:

- 11% report full alignment

- 40% are "mostly aligned"

- 37% report moderate alignment with challenges

- 13% work at cross-purposes or with little alignment

In your experience, how aligned are marketing and sales teams at your company?

■ All Teams ■ High-performing teams ■ Low-performing teams

Chart data:

Alignment	All Teams	High-performing teams	Low-performing teams
Not at all aligned	3%	0%	7%
A little aligned	10%	2%	24%
Moderately aligned	37%	23%	45%
Mostly or Fully aligned	51%	75%	24%

Findings: Sales Marketing Alignment

Alignment gap

51-point performance gap between high and low performers:

- 75% of high performers report being mostly or fully aligned
- Only 24% of low performers can say the same

High performers are:

- 5× more likely to achieve full alignment (22% vs. 4%)
- 2× more likely to be mostly aligned (53% vs. 20%)

High performers:

75%
of high performers report being mostly or fully aligned

5x
more likely to achieve full alignment

2x
more likely to be mostly aligned

Findings: Sales Marketing Alignment   **Regional**

Regional alignment

REGIONAL INSIGHT

Sales-marketing alignment is stronger in the US (52% fully/ mostly aligned) and UK/Europe (53%) compared to APAC (44%). While all regions have gaps, APAC clearly has an opportunity to lean more into sales-marketing alignment for performance improvements.
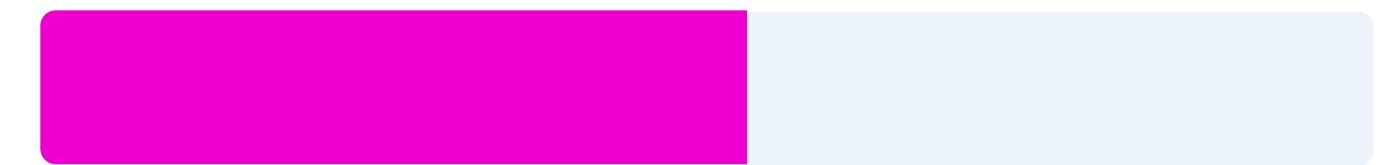
" We should really be working on the same set of customers together all the time. If only 5-to-10% of customers are actually in-market at any given time, then we all need to work together on that 5-to-10% and stop worrying about yours, mine. It's ours.

Deb Wolf
CMO
Dataminr

Sales-marketing alignment

UK/Europe (53%)

US (52%)

APAC (44%)

Findings: Sales Marketing Alignment

Communication

BREAKING DOWN COMMUNICATION BARRIERS

Missed opportunities in sales-marketing collaboration:

- 63% of teams have no formal process to gather input from sales for buyer identification
- Teams struggle with qualification and nurturing, areas where sales insight is valuable

Keys to improving alignment:

1 Take common ownership over shared metrics that matter to both teams

2 Develop processes for collaborative lead qualification and nurturing

3 Create formal information loops for continuous improvement

4 Focus on revenue impact as the ultimate measure of success

> "Based on a shared objective, the conversation becomes what can marketing deliver to help achieve that. In contrast, if marketing's success does not translate to business success—if the objective is not aligned — it creates that conflict. That isn't productive. After all, we have to acknowledge that a lot of B2B and software businesses are sales-led.

Maryel Roman
Head of Digital Demand
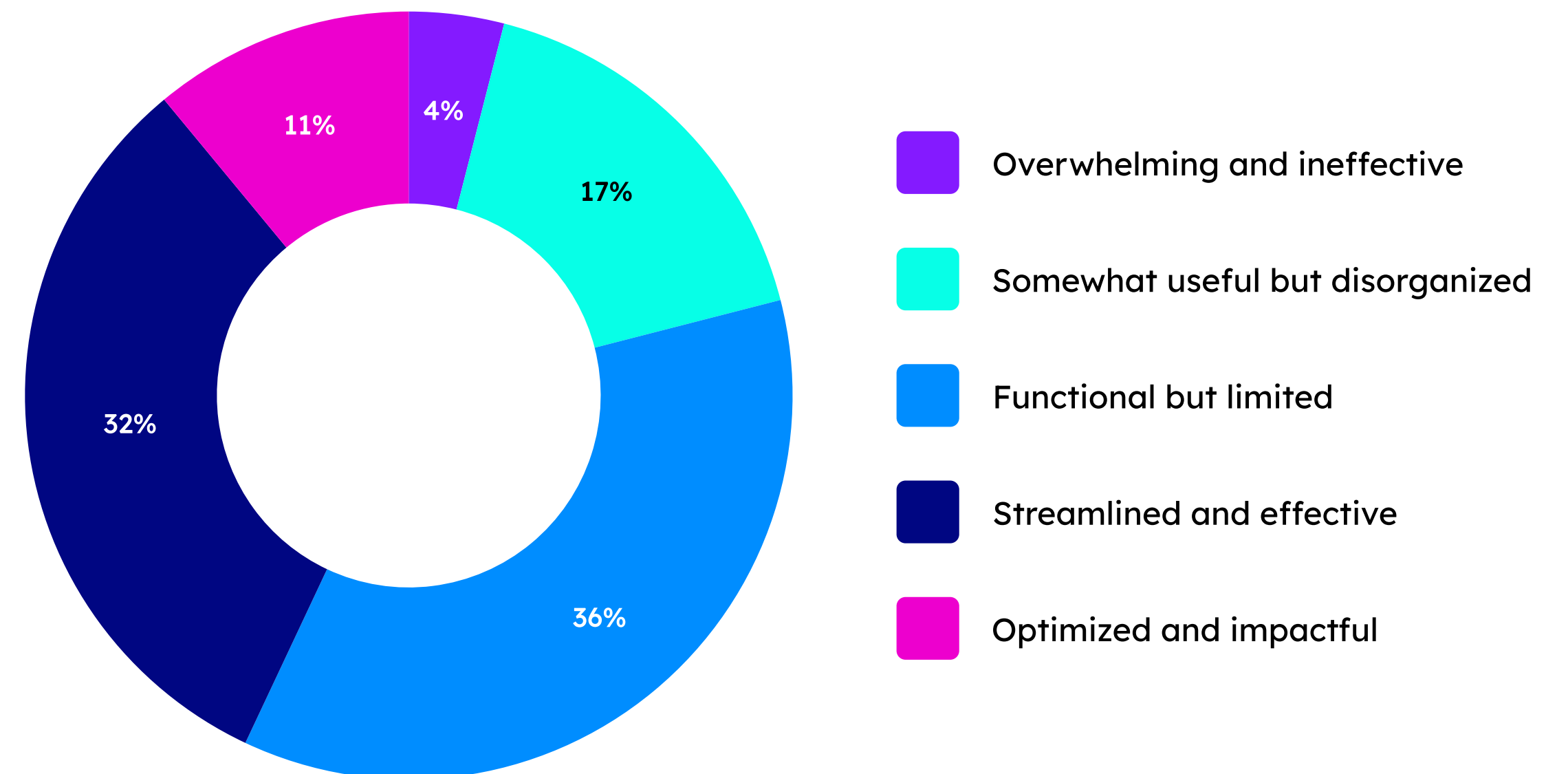Adobe APAC

Leveraging technology, data, and content

Findings: Technology

Martech stack assessment

Most teams (57%) are dissatisfied with their current tech stacks:

- 11% describe their tech as fully optimized

- 36% say it's "functional" but limited, and lacks advanced capabilities

- 17% characterize their stack as disorganized

- 4% find their technology overwhelming

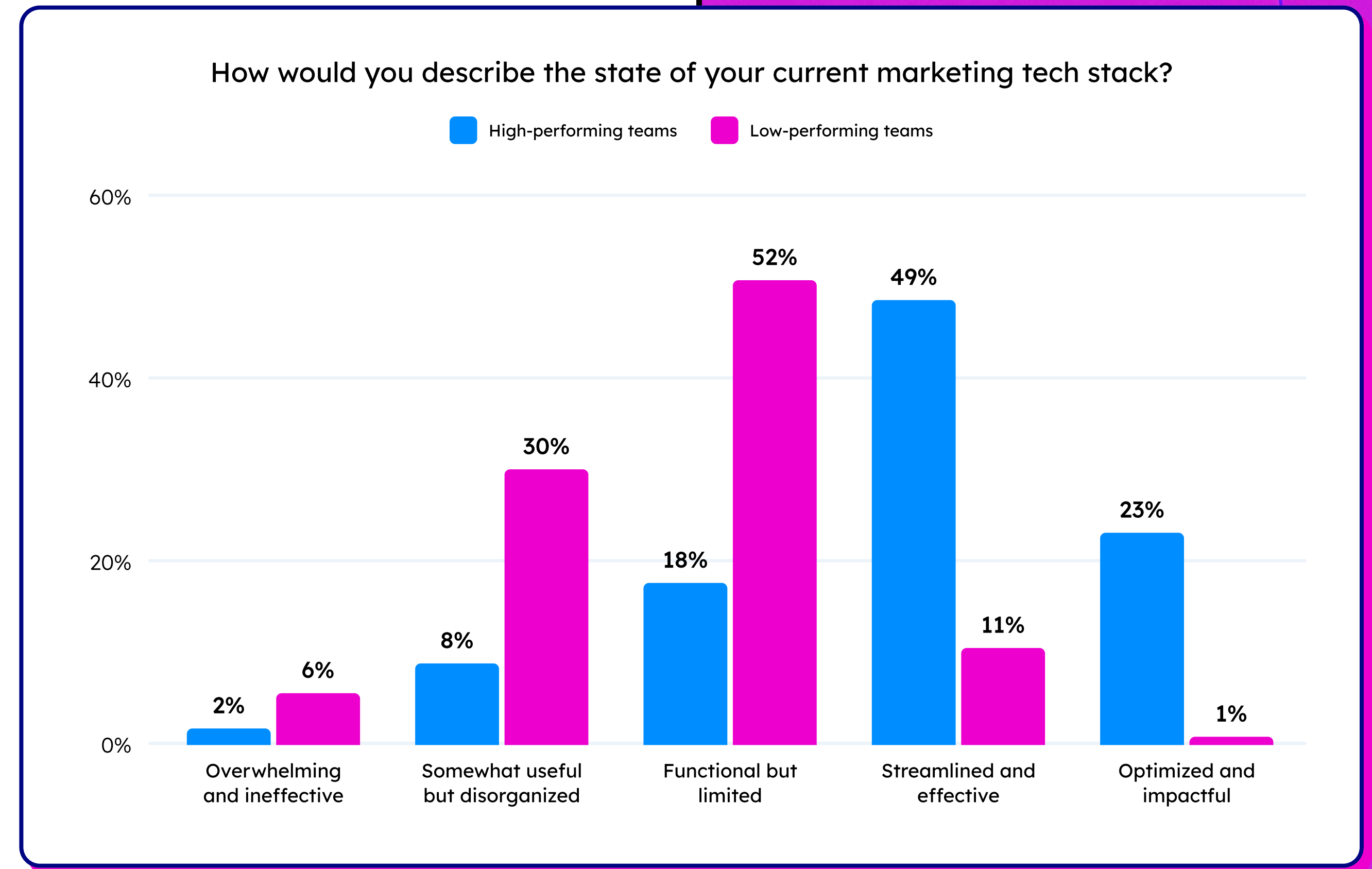How would you describe the state of your current marketing tech stack?

- 4% — Overwhelming and ineffective
- 17% — Somewhat useful but disorganized
- 36% — Functional but limited
- 32% — Streamlined and effective
- 11% — Optimized and impactful

Findings: Technology

Martech stack assessment

60-point performance gap between high and low performers:

- 72% of high performers are satisfied with their tech stack (23% "optimized," 49% "streamlined")

- Only 12% of low performers report the same level of satisfaction

How would you describe the state of your current marketing tech stack?

■ High-performing teams   ■ Low-performing teams

|	High-performing teams	Low-performing teams
Overwhelming and ineffective	2%	6%
Somewhat useful but disorganized	8%	30%
Functional but limited	18%	52%
Streamlined and effective	49%	11%
Optimized and impactful	23%	1%

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Findings: Technology

Tech investment priorities

Investment priorities are shifting:

Only 27% say they plan to allocate significant investments from 2025 budgets to technology and marketing ops, ranking this area 8th among priorities. Teams are focusing budgets on core, prospect-facing areas like digital marketing (54%), social media (43%), customer marketing (41%) and content (40%) instead.

Marketing teams budget priorities for 2025

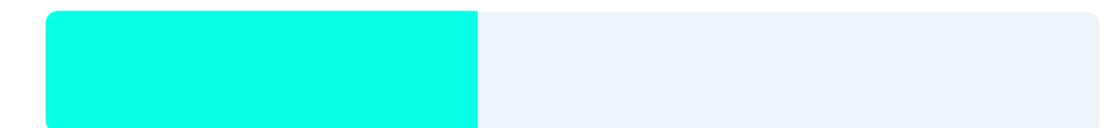Technology and marketing ops (27%)
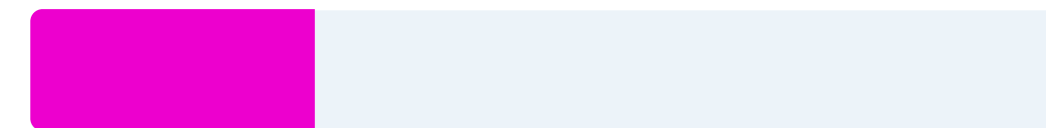
Digital marketing (54%)

Social media (43%)

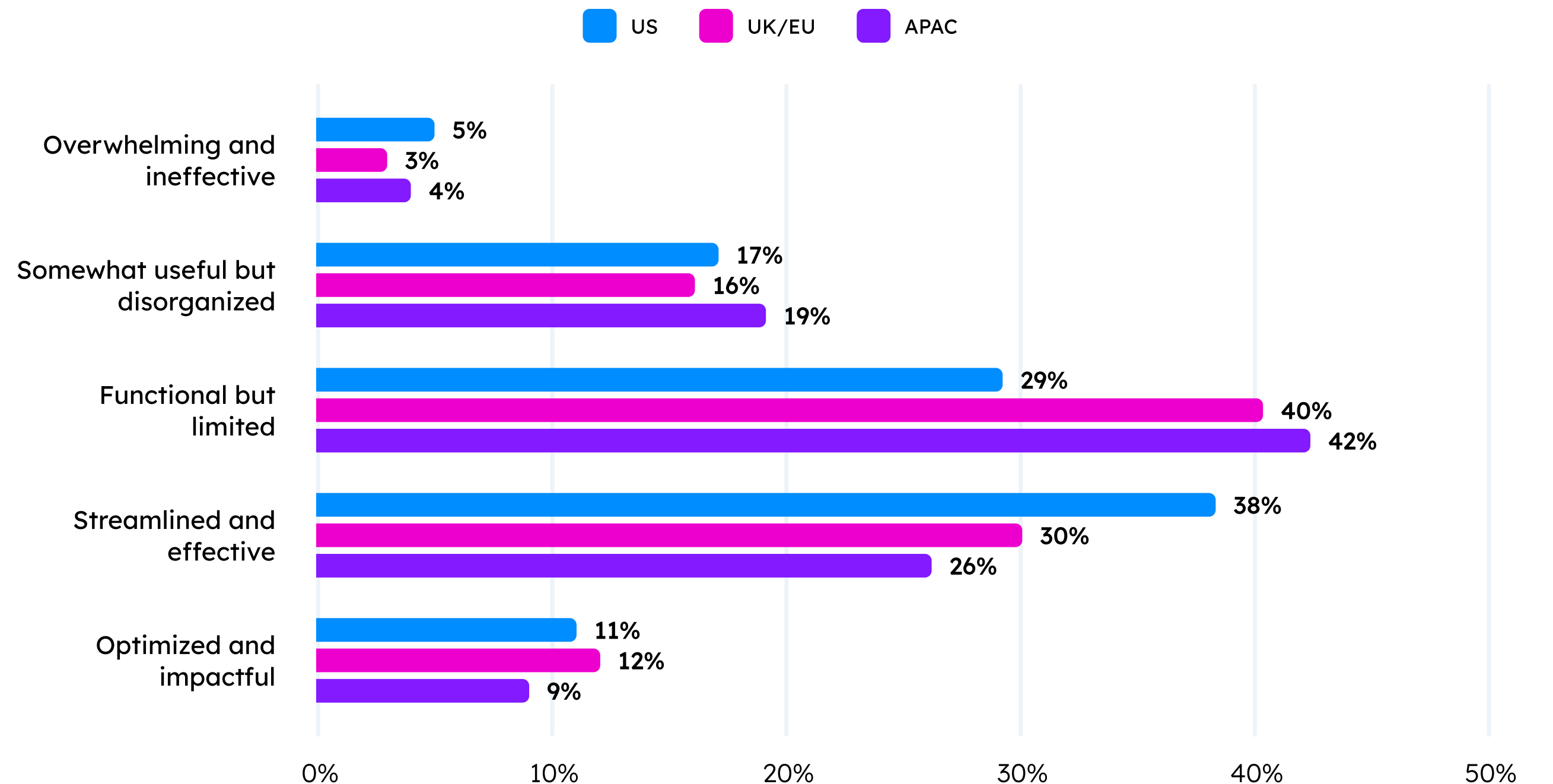Customer marketing (41%)

Content (40%)

Findings: Technology **Regional**

Regional technology stack

REGIONAL INSIGHT

US marketers lead in technology satisfaction, with 38% describing their tech as "streamlined and effective" vs. 30% in UK/Europe and 26% in APAC.

How would you describe the state of your current marketing tech stack?

■ US   ■ UK/EU   ■ APAC

Overwhelming and ineffective
- US: 5%
- UK/EU: 3%
- APAC: 4%

Somewhat useful but disorganized
- US: 17%
- UK/EU: 16%
- APAC: 19%

Functional but limited
- US: 29%
- UK/EU: 40%
- APAC: 42%

Streamlined and effective
- US: 38%
- UK/EU: 30%
- APAC: 26%

Optimized and impactful
- US: 11%
- UK/EU: 12%
- APAC: 9%

Findings: Technology

Outcomes over tools
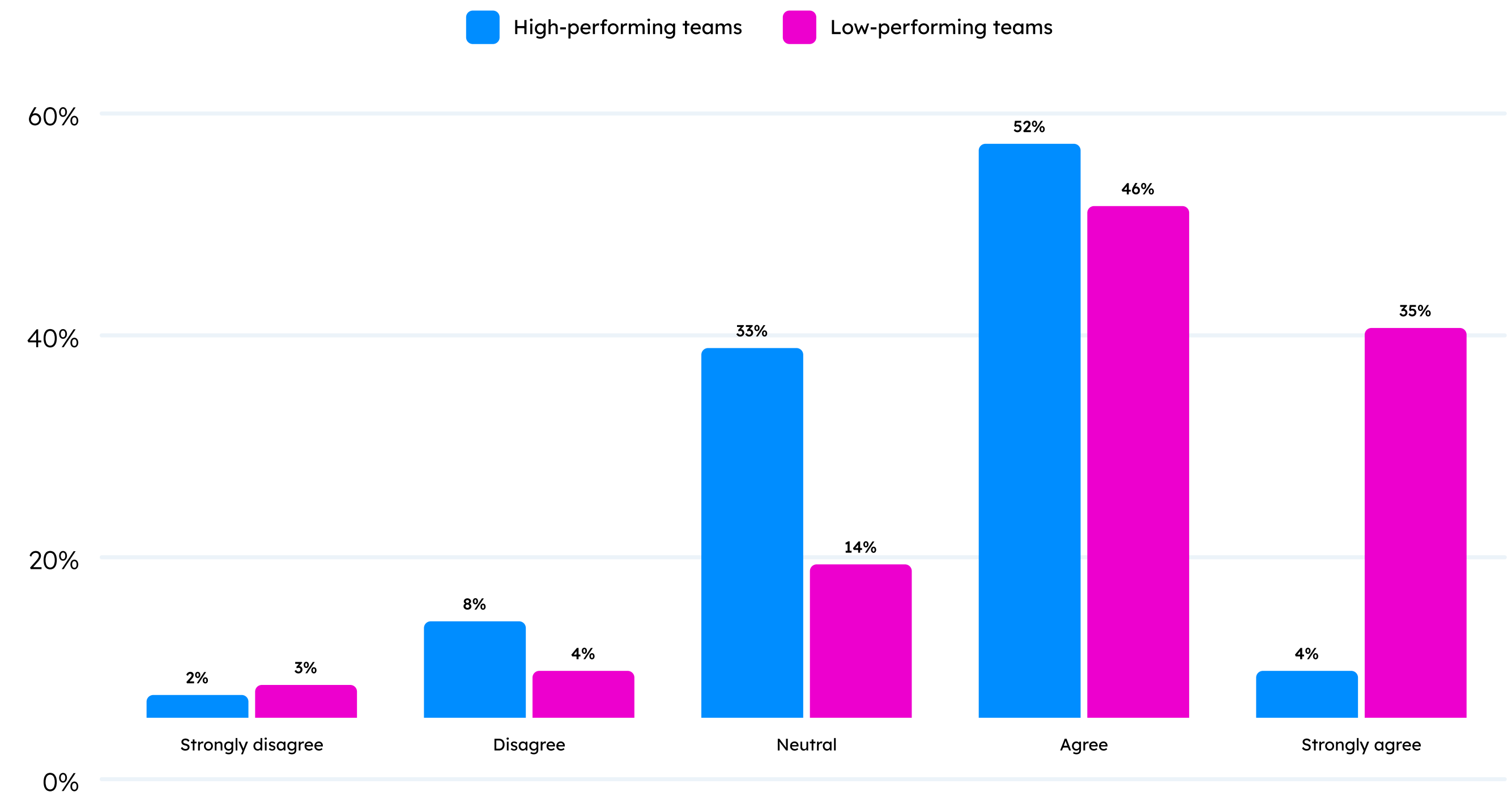
THE OUTCOMES-OVER-TOOLS SHIFT

69% of marketers prefer delivered insights and services over additional tools:

- Only 7% disagree with this sentiment

- 23% remain neutral

This preference is even stronger among high performers:

- 81% favor delivered services and insights compared to only 56% of low performers

- 35% "strongly agree" with this preference compared to only 4% of low performers

- 23% remain neutral

Marketing teams value actionable support, like delivered insights or done-for-you services, over adding new tools to their tech stack.

■ High-performing teams   ■ Low-performing teams

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
High-performing teams	2%	8%	33%	52%	4%
Low-performing teams	3%	4%	14%	46%	35%

"We're seeing that SaaS is really starting to consolidate. A connected phenomenon is 'service as software.' Companies want the flexibility of contracting for a service and an outcome, and they want you to manage the complexity for them.

Tony Uphoff
CEO
Pipeline360

This reflects growing fatigue with martech complexity and sprawl and recognition — especially among the top B2B marketing teams — that concrete outcomes matter more than spending on the next shiny tool.

Findings: Technology   **Deep Insight**

The Martech consolidation trend

THE MARTECH CONSOLIDATION IMPERATIVE

After a decade of explosive growth in marketing technology, we're witnessing a significant market correction.

The average go-to-market stack now contains <u>23+ tools</u>, creating overwhelming complexity that's hindering rather than helping marketing and sales teams. Our data shows high performers are 6× more likely to have streamlined tech stacks, but the real revelation is that they are overwhelmingly demanding solutions that deliver outcomes rather than features. This represents a fundamental shift from "more tools" to "more results" that's reshaping B2B marketing teams.

23+
The average go-to-market stack now contains 23+ tools

High performers:

6x
more likely to have streamlined tech stacks

Outcomes
High performers demand solutions that deliver outcomes rather than features

Findings: Data

Data effectiveness

THE DATA EFFECTIVENESS GAP

The survey defined data-handling competency as a **"company's ability to collect, analyze, and interpret data to refine marketing strategies and measure success."**

- Across all teams 54% say improvement is needed, including those rating their capabilities as average (34%), fair (16%) or poor (4%)

- The plurality that rate their abilities as "average" say data is regularly analyzed and yields "some" useful insights, but gaps remain

- Those (20%) that say their abilities are fair or poor cite "inconsistent" data collection and a lack of actionable insights

How would you rate your company's ability to collect, analyze, and interpret data to refine marketing strategies and measure success?

Rating	Percentage
Poor	2%
Fair	15%
Average	38%
Very good	34%
Excellent	11%
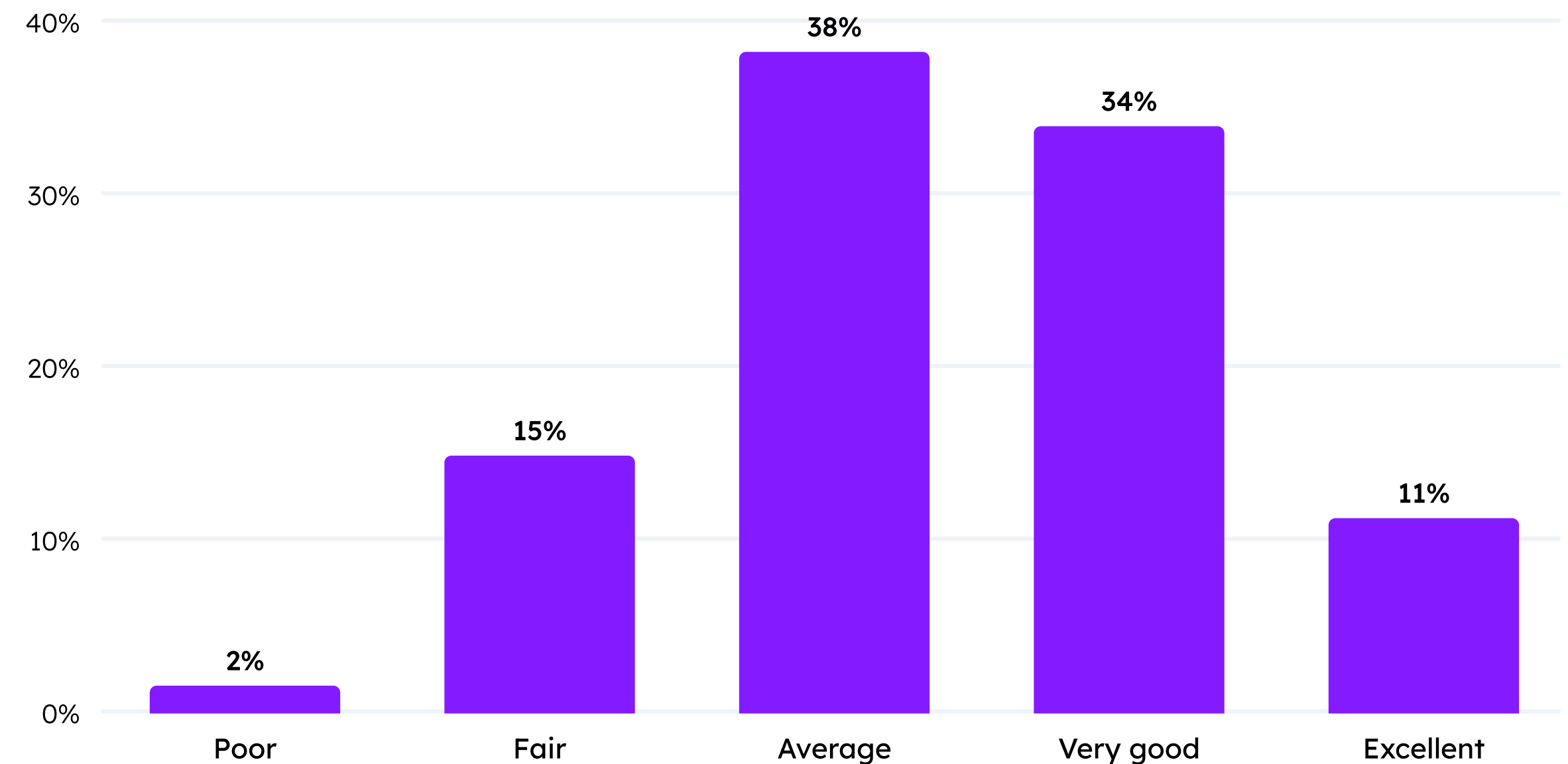
Findings: Data

Data effectiveness performance gap

EFFECTIVE DATA-HANDLING PRACTICES STRONGLY CORRELATED WITH HIGH PERFORMANCE
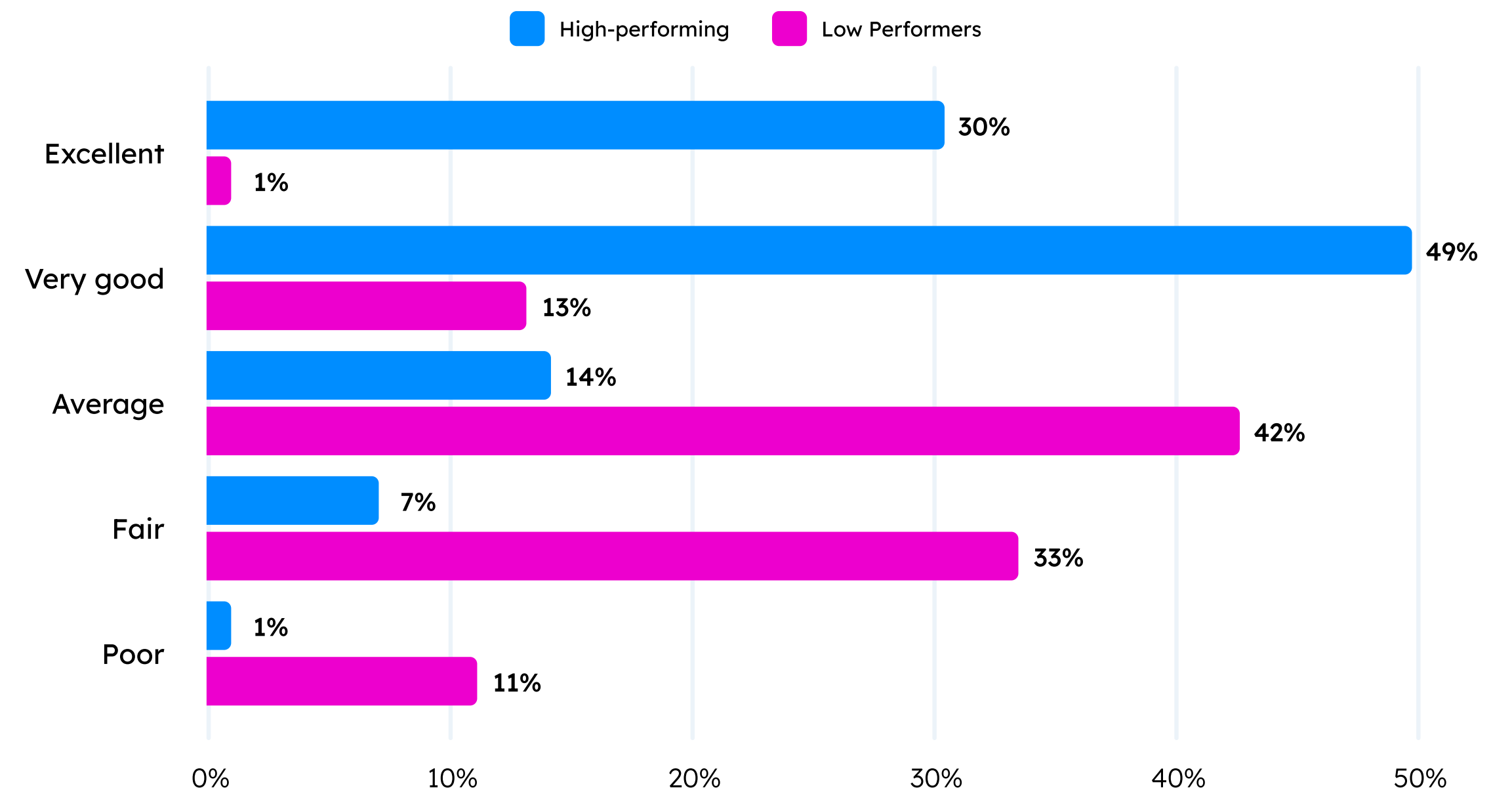
Our survey revealed this area as the largest performance differentiator (65-point gap), indicating that effective data-handling is at the core of driving performance gains across B2B marketing disciplines:

- 79% of high performers rate their data-handling capabilities as "very good" or "excellent," with expert and consistent leveraging of data that delivers actionable insights

- Only 14% of low performers make the same claim

Specific data capability gaps:

- 30% of high performers describe capabilities as "excellent" vs. 1% of low performers

- 49% of high performers rate abilities as "very good" vs. 13% of low performers

- Only 8% of high performers struggle with data (rate their ability as "fair" or "poor") while that proportion is more than 5x higher for low performers (44%)

How would you rate your company's ability to collect, analyze, and interpret data to refine marketing strategies and measure success?

■ High-performing   ■ Low Performers

| Rating	High-performing	Low Performers
Excellent	30%	1%
Very good	49%	13%
Average	14%	42%
Fair	7%	33%
Poor	1%	11%

Findings: Data

Improvement areas

The relationship between data and performance is straightforward: Better data leads to better decisions, which in turn drive better results.

But data also allows teams to measure success and communicate effectively around the value they deliver. Without above average data collection and interpretation, marketers' ability to communicate their impact is eroded — not ideal at a time when sales and marketing are meant to be sitting around the same table.

In terms of investments to improve their capabilities, respondents prioritize:

- Performance analysis: More robust analytical processes to uncover audience behaviors and campaign performance (60%)

- Better data collection methods for completeness and reliability (47%)

- Improved data interpretation skills to shape marketing tactics (45%)

- Clearer reporting for leadership buy-in (43%)

Which of the following would improve your company's ability to truly learn from and take action on your data?

	%
Performance analysis	60%
Data collection	47%
Data interpretation skills	45%
Reporting	43%
Metric definition	35%
None	1%
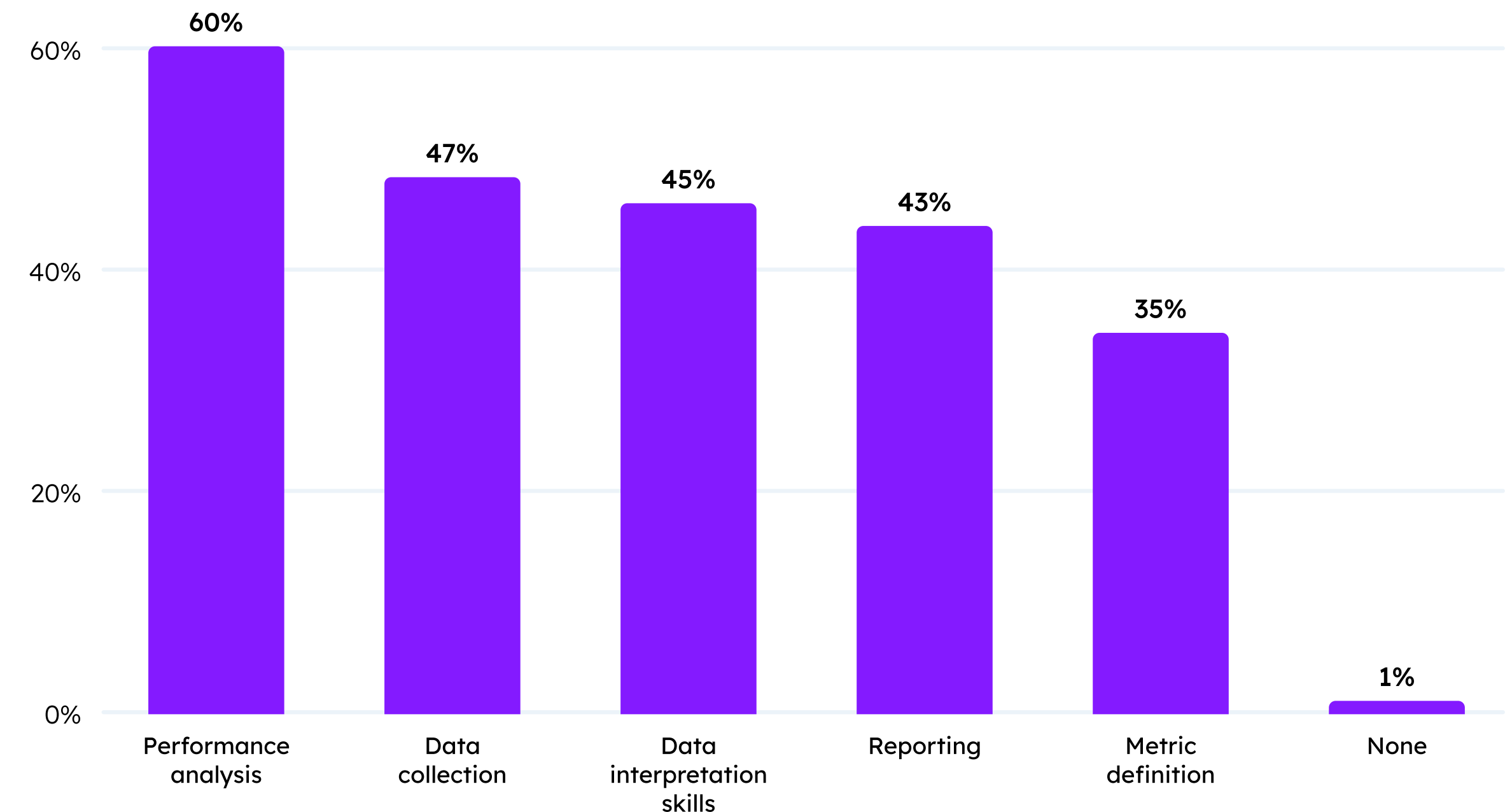
Findings: Data

Compliance and accuracy

DATA COMPLIANCE AND ACCURACY

A clear majority, 73% of B2B marketers rank data compliance and accuracy as a high or top priority

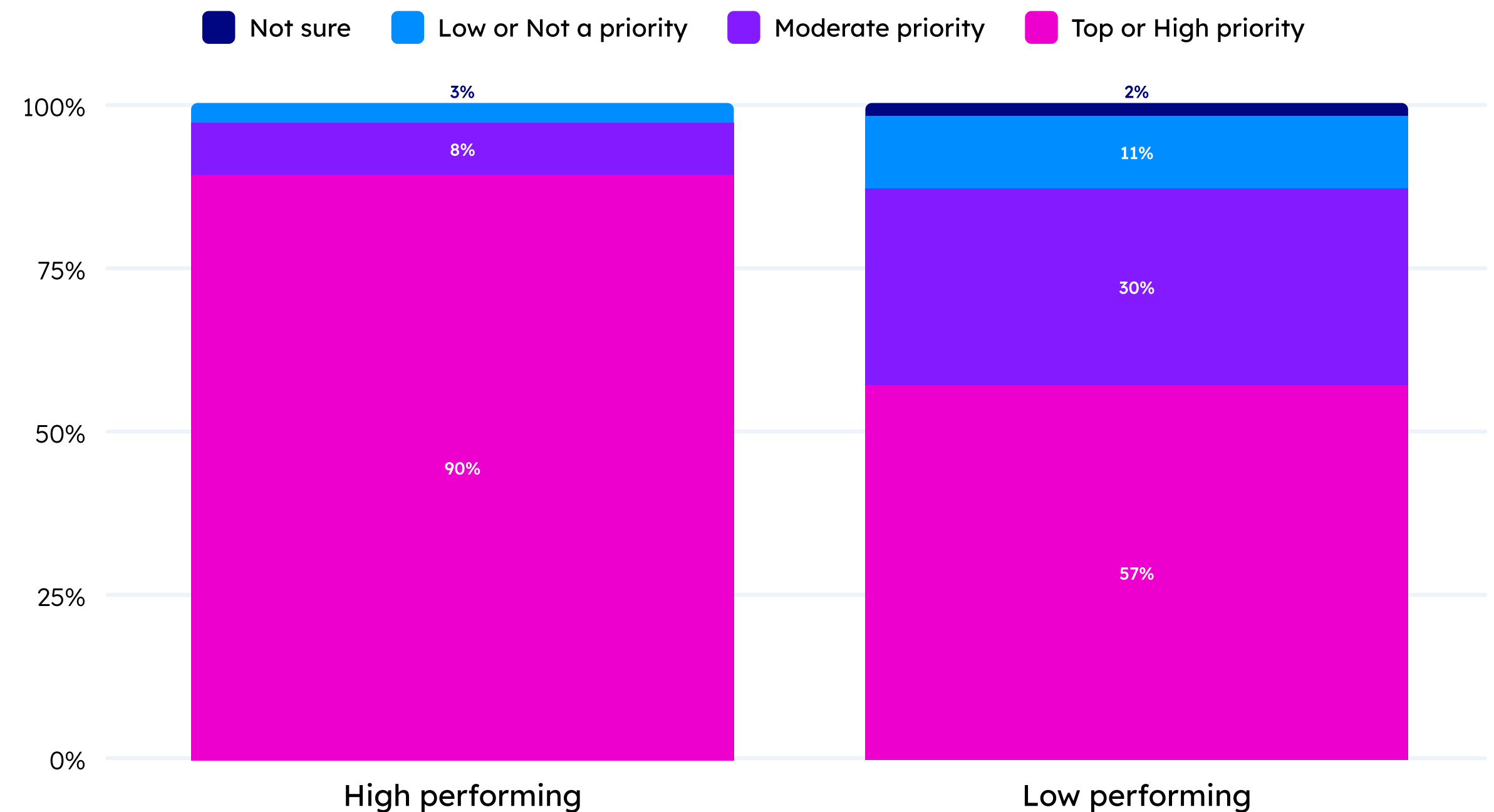But to our surprise this emerged as an area high performers take much more seriously:

33-point performance gap:

- 90% of high performers make data compliance and accuracy a high/top priority

- Only 57% of low performers do the same

This gap is surprising given:

- Increasing data privacy regulations (GDPR, CCPA)

- The critical role of data accuracy in targeting and personalization

- The competitive advantage data provides to high performers

To what extent is ensuring data compliance and accuracy a priority at your company?

Legend:
- Not sure
- Low or Not a priority
- Moderate priority
- Top or High priority

High performing:
- Low or Not a priority: 3%
- Moderate priority: 8%
- Top or High priority: 90%

Low performing:
- Not sure: 2%
- Low or Not a priority: 11%
- Moderate priority: 30%
- Top or High priority: 57%
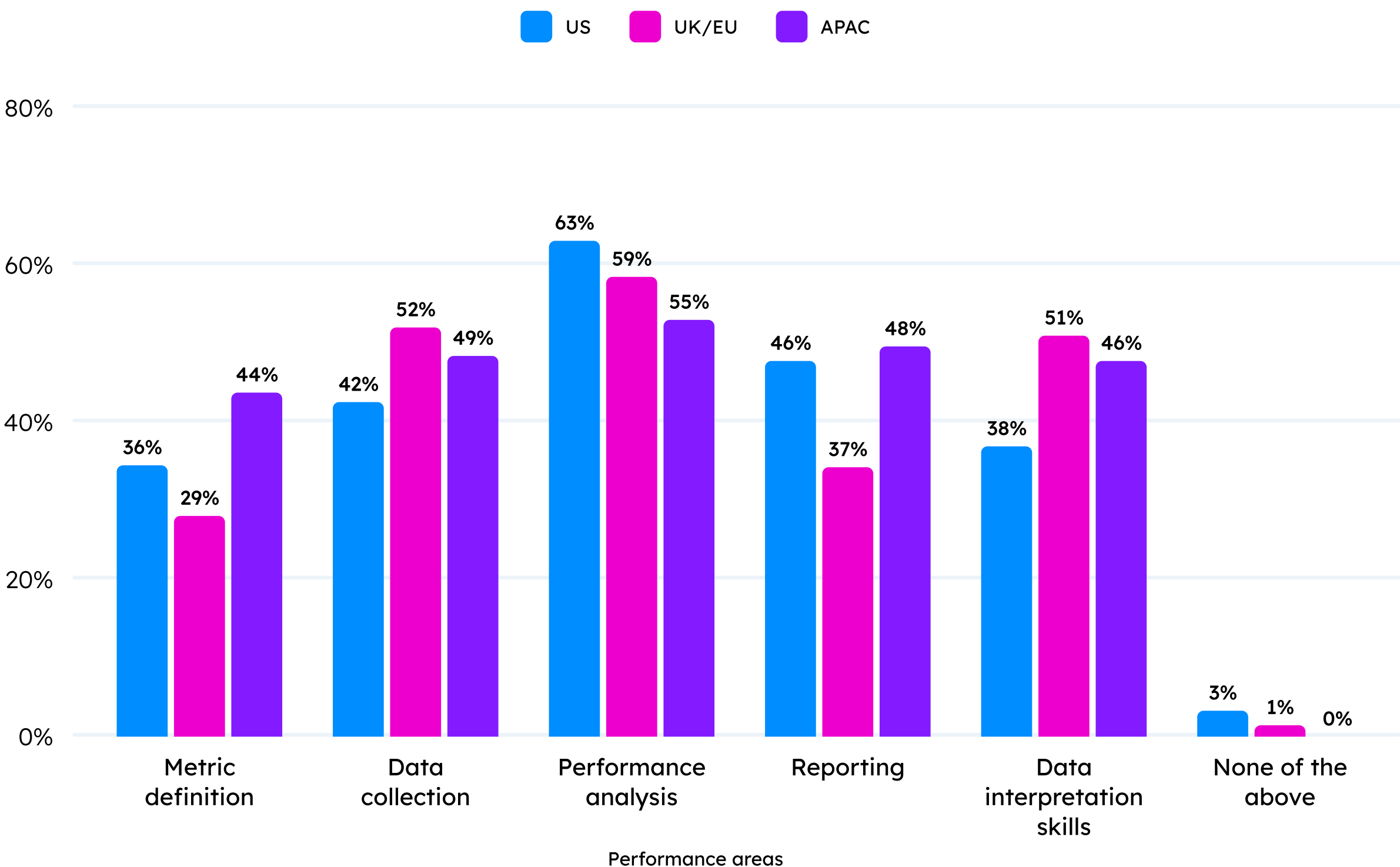
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Findings: Data **Regional**

Regional effectiveness insights

REGIONAL INSIGHT

UK/Europe teams report the highest need for improved data collection (52%) compared to US (42%) and APAC (49%). Europe and the UK also overindex for seeing a need for improved data interpretation. These findings likely reflect the impact of stringent regional data regulations, in conjunction with the heterogeneity of European audiences

Which of the following would most improve your company's ability to truly learn from and take action on your data?

US **UK/EU** **APAC**

Performance area	US	UK/EU	APAC
Metric definition	36%	29%	44%
Data collection	42%	52%	49%
Performance analysis	63%	59%	55%
Reporting	46%	37%	48%
Data interpretation skills	38%	51%	46%
None of the above	3%	1%	0%

Performance areas

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Findings: Content

Effectiveness and challenges

CONTENT SUPPORT AND PERSONALIZATION

53% of companies rate their content as good or exceptional, but significant gaps remain
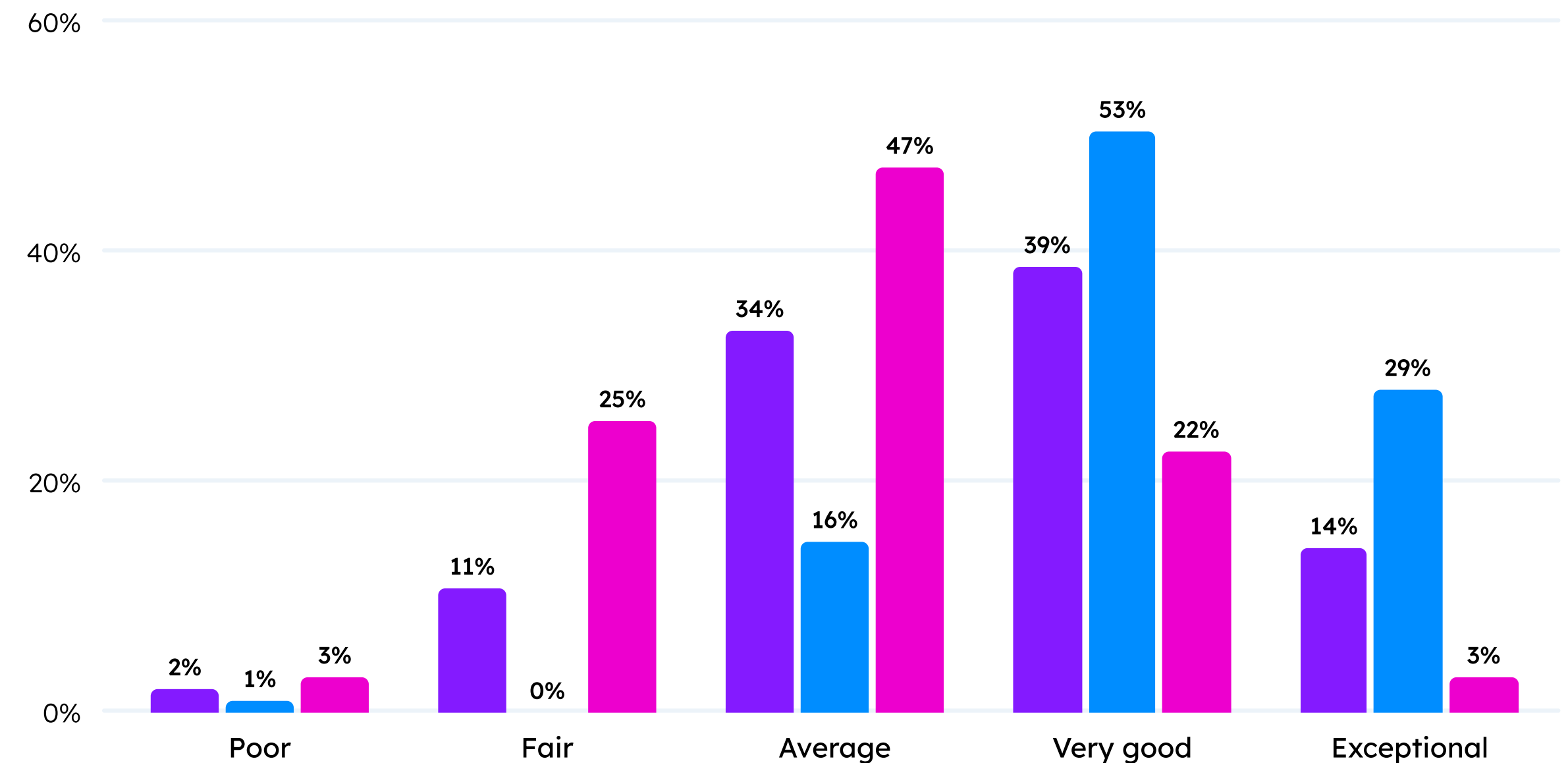
58-point performance gap:

- 82% of high performers rate content as "very good" or "excellent"
- Only 25% of low performers say the same

Content impacts all areas of the funnel, especially lead generation and lead nurturing, and in general triggers the engagement which allows teams to properly identify, qualify, and track leads. Given the pivotal role it plays, it's not surprising that content excellence is correlated with high performance.

How would you rate your company's ability to develop content that is engaging, relevant, and high-quality?

■ All teams   ■ High performers   ■ Low performers

	Poor	Fair	Average	Very good	Exceptional
All teams	2%	11%	34%	39%	14%
High performers	1%	0%	16%	53%	29%
Low performers	3%	25%	47%	22%	3%

Findings: Content

Effectiveness improvement

The top areas for improvement in content hint at the opportunity for data- and AI-driven personalization to scale relevance.
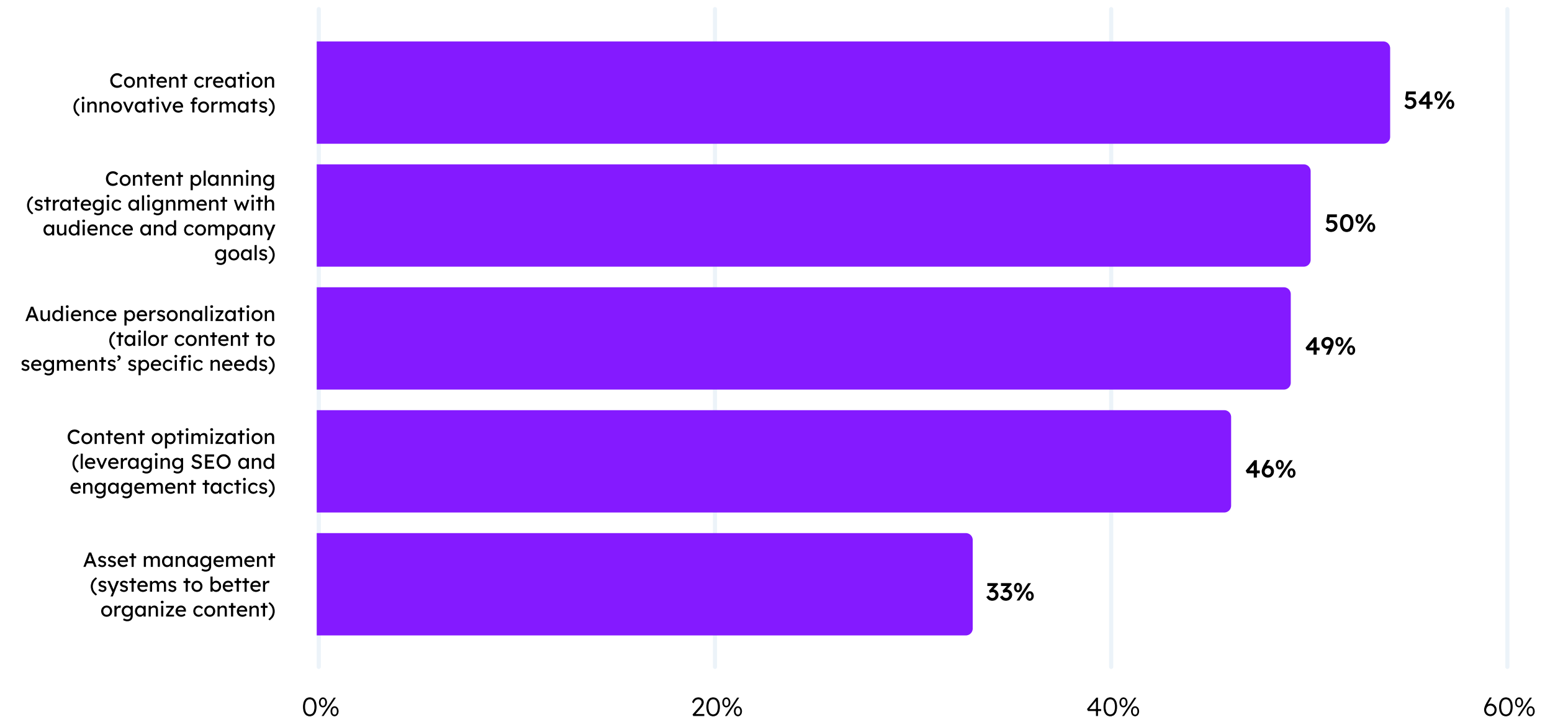
Respondents' top focus areas for improving content:

- Adopting innovative approaches for content creation (54%), including video, blogs, case studies, and whitepapers

- Implementing strategic content planning (50%)

- Personalizing content across assets and channels (49%)

- Leveraging SEO and engagement tactics (46%)

The focus on scaling content creation and personalization tie into opportunities flagged elsewhere in the survey:

- As we saw, 52% identify data-driven personalization as the top factor to improve lead nurturing

- Below, we'll see 36% — a higher percentage than for any other answer — believe generative AI will be valuable for content creation

Which of the following do you believe would improve the content and assets your company creates?

Category	Percentage
Content creation (innovative formats)	54%
Content planning (strategic alignment with audience and company goals)	50%
Audience personalization (tailor content to segments' specific needs)	49%
Content optimization (leveraging SEO and engagement tactics)	46%
Asset management (systems to better organize content)	33%

Findings: Content   **Regional**

Effectiveness improvement

REGIONAL INSIGHT

UK/Europe (56%) and APAC (57%) teams are more likely than US (47%) to cite content personalization as a promising lever for improving their lead nurturing efforts. This is likely evidence of European and APAC companies' challenges in tailoring content across diverse regions and languages.

Content personalization as a way to improve lead nurturing efforts

UK/Europe (56%)

US (47%)

APAC (57%)

Findings: AI

AI adoption and impact

AI ADOPTION AND IMPACT

Top AI priorities for B2B marketers:

- Content creation (36%) and ad copy (28%)
- Email marketing optimization (36%)
- Customer insights (30%)
- Lead scoring (29%)

Secondary AI applications:

- Predictive analytics (28%)
- Chatbots (27%)
- Sales forecasting (19%)
- Dynamic pricing (14%)

B2B marketers are focusing on AI for practical applications addressing specific funnel pain points rather than advanced internal applications, at least for now.

AI is particularly important for email (the top lead generation channel used by 66% of respondents and 72% of high performers) and content personalization (cited by 52% as key to improving lead nurturing).

Which of the following AI or machine learning applications would be most valuable to your team? (select up to 3)

Application	Percentage
Generative AI for content creation	36%
AI for email marketing optimization	36%
ML for customer insights	30%
AI for lead scoring	29%
Generative AUI for ad copy	28%
AI for predictive analytics	28%
AI-driven chatbots	27%
ML for sales forecasting	19%
ML for pricing optimization	14%
None of the above	5%
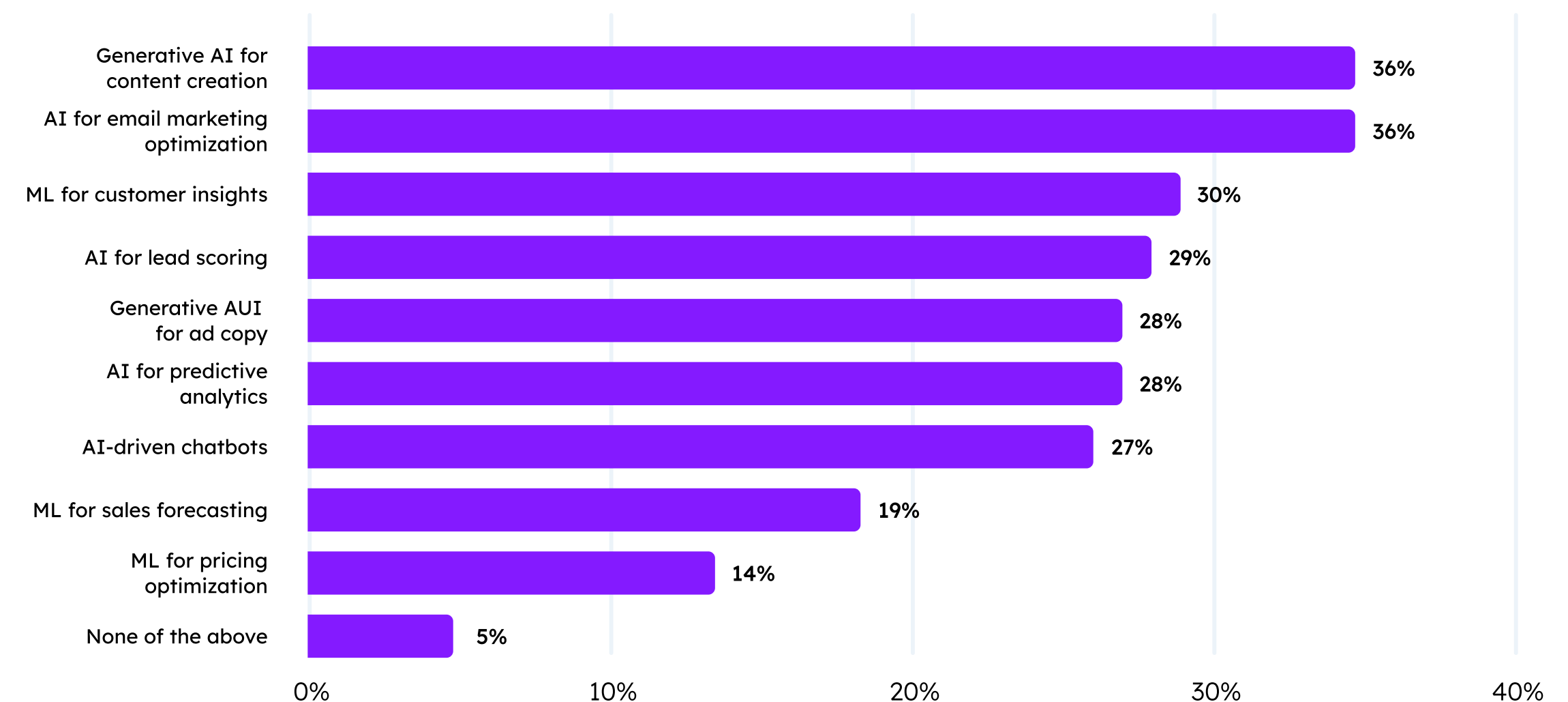
Findings: AI **Deep Insight**

AI's strategic role

AI'S STRATEGIC ROLE IN PIPELINE GENERATION

While AI has dominated headlines as a generational technology, our research reveals that B2B marketers are taking a pragmatically pointed approach to adoption. The focus isn't on AI for its own sake or for wholesale transformation, but on applying it to solve specific pipeline challenges. The clearest pattern: marketers are using AI to bridge performance gaps in scaling personalization across email and content campaigns. With content personalization cited as the top factor that would improve lead nurturing (52%), and email remaining the dominant lead generation channel (66%), AI is becoming the critical bridge between fragmented data and the personalized experiences buyers now expect.

Lead nurturing

52%
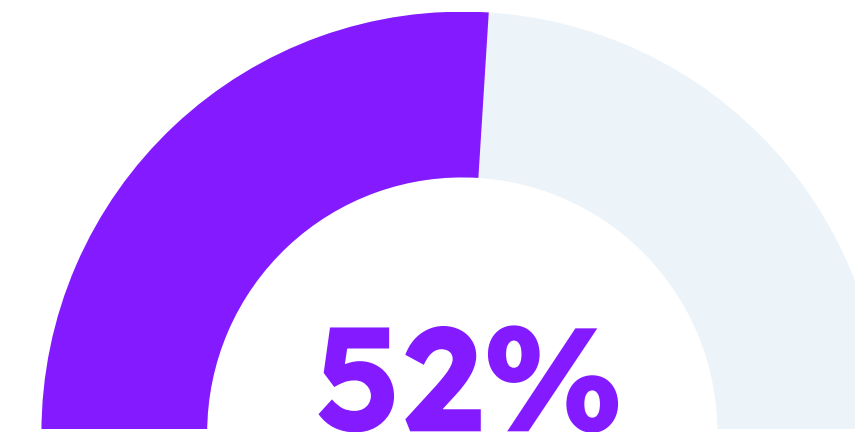
Content personalization

Lead generation

66%
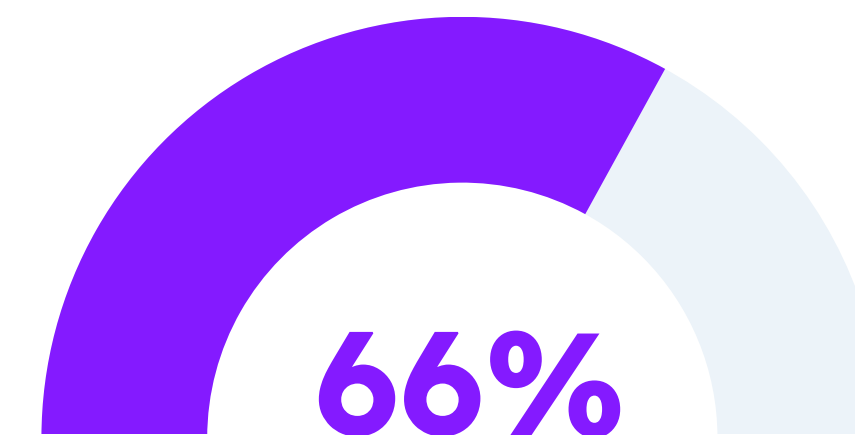
Email

Strategies of high performing teams

Findings: Strategies of high performing teams

KPI evolution

THE EVOLUTION OF B2B MARKETING METRICS

Traditional marketing metrics are being complemented by business outcomes:

- Website traffic (43%) and revenue generated (42%) are nearly tied as the most-used metrics

- This balance reflects the dual responsibility of marketing: building awareness and driving revenue

- High performers are leading this shift, with 50% using revenue generated as their primary KPI

The future of B2B marketing metrics, according to our survey respondent and interviewees:

- Account-level engagement metrics are gaining traction

- "Accounts penetrated" measured against high-intent target accounts

- Buying group coverage (percentage of key stakeholders engaged)

- Multi-touch attribution models that account for non-linear buying journeys

This evolution reflects the recognition that the B2B buying process has fundamentally changed, requiring metrics that capture group-based decision-making.

"In many ways, marketing has grown much closer to revenue operations — and to revenue discussions in general. And that's a positive.

The challenge is for marketers to speak the language of business value, which is what's needed to sell-in the role of marketing effectively.

Fiona McKenzie
CEO
Revere

Findings: Strategies of high performing teams

The Future of AI in B2B Marketing

THE EVOLUTION OF B2B MARKETING METRICS

AI adoption is evolving from experimentation to strategic implementation:

- Current focus is tactical: content creation (36%) and email optimization (36%)
  - Next wave will integrate AI more deeply into marketing operations:
  - Predictive analytics (28%), sales forecasting (19%), and dynamic pricing (14%) show emerging interest

The strategic path forward:

- Advanced personalization will bridge the gap between fragmented data and buyer expectations
- AI-driven insights will increasingly support sales-marketing collaboration on target accounts
- Customized content delivered at scale will address the personalization gap
- AI will gradually be extended to integrated marketing intelligence

The key distinction: successful AI implementation will focus on solving specific business problems rather than implementing technology for its own sake.

Findings: Strategies of high performing teams

High-Performing Teams – Key Differentiators

STRATEGIES OF HIGH-PERFORMING TEAMS

High-performing marketing teams distinguish themselves through six key capabilities:

1. **Effective in leveraging data to refine strategies and measure outcomes (65-point gap)**

   - 79% of high performers excel at leveraging data vs. 14% of low performers

2. **Technology integration (60-point gap)**

   - 72% have streamlined tech stacks vs. 12% of low performers

3. **Target audience and buyer engagement (60-point gap)**

   - 72% consistently reach and engage targets vs. 15% of low performers

3. **Lead nurturing (59-point gap)**

   - 69% are very good or excellent at nurturing leads vs. 10% of low performers

4. **Content effectiveness (58-point gap)**

   - 82% rate their content as excellent/very good vs. 25% of low performers

5. **Sales-marketing alignment (51-point gap)**

   - 75% report strong alignment vs. 24% of low performers

These capabilities work together, creating a virtuous cycle of improvement and integrated efforts that drives superior marketing outcomes.

Findings: Strategies of high performing teams

Deep Insight – The Virtuous Cycle of High Performance

THE FLYWHEEL OF HIGH PERFORMANCE

Our research reveals that high performance in B2B marketing isn't driven by isolated capabilities but by an interconnected system where strengths reinforce each other. The substantial performance gaps we measured (ranging from 51-65 percentage points) don't exist independently—they represent a virtuous cycle where data effectiveness enables better decision-making and audience targeting, which improves content and email relevance, which enhances lead nurturing, where strengthened sales-marketing alignment means more effective identification and managing of buyers. This explains why the performance gap between leaders and laggards is wide despite similar tools, channel selection, and challenges. High performers aren't simply better at individual tasks—they've created self-reinforcing systems that compound their advantages over time.

Conclusions/
Recommendations

2025 State of B2B Pipeline Growth: How B2B Marketers Are Navigating Uncertainty

Recomendations

Data Capabilities

RECOMMENDATION 1: PRIORITIZE DATA CAPABILITIES

Why it matters

Data effectiveness is the largest performance differentiator we identified (65-point gap) between high and low performers. Superior data collection creates more visibility and fewer missed opportunities, while improved analysis and interpretation translate to better decisions and an ability to measure and communicate marketing's value.

Implementation tip

Begin with a data audit to identify gaps in collection, quality, and usage, then prioritize improvements based on revenue-impact potential.

Take action

1 Invest in prioritizing data quality, compliance, and accuracy. It's not only a matter of good data hygiene and compliance, but a driver of outperformance.

2 Work with outside providers' datasets to complement internal data resources and close gaps

3 Focus on data that supports targeting buying groups and identifying individuals in those groups

Recomendations

Sales-Marketing Alignment

RECOMMENDATION 2: STRENGTHEN SALES-MARKETING ALIGNMENT

Why it matters

75% of high performers report strong sales alignment compared to just 24% of low performers.

Implementation tip

Start with a joint workshop between sales and marketing leaders to identify friction points and communication gaps. Establish shared KPIs for the next quarter.

Take action

1   Prioritize and take ownership of shared lower-funnel goals and revenue-impact metrics

2   Create collaborative processes for account targeting, account penetration and engagement, and individual buyer identification

3   Ensure regular communication and feedback loops

4   Consider a full complement of 3 to 4 top KPIs: Supplement revenue KPIs with internal metrics for funnel health

Recomendations

Lead Nurturing

RECOMMENDATION 3: ENHANCE LEAD NURTURING EFFECTIVENESS

Why it matters

69% of high performers excel at lead nurturing compared to just 10% of low performers.

Implementation tip

Analyze current nurture performance by stage, identify drop-off points, and redesign sequences with the help of AI to address specific buying group roles and concerns

Take action

1 Implement data-driven content personalization for nurture sequences, particularly in emailed assets

2 Use AI to scale personalization efforts

3 Develop better engagement tracking to understand prospect behavior

4 Integrate with clearer lead qualification and scoring processes

Recomendations

Tech Stack Optimization

RECOMMENDATION 4: OPTIMIZE TECHNOLOGY AND EMBRACE SERVICES

Why it matters

72% of high performers have streamlined tech stacks compared to just 12% of low performers. All teams (69%) but especially high performers (81%) value delivered services over tools.

Implementation tip

Conduct a martech audit to identify unused or underutilized tools, consolidate redundant systems that don't advance personalization, and strengthen integration between core platforms before adding new vendors.

Take action

1   Focus on integrating existing tools before adding new ones

2   Consider services over software where appropriate

3   Align technology investments with specific business outcomes

4   Prioritize tools that improve personalization at scale

Recomendations

Content Quality

**RECOMMENDATION 5: ELEVATE CONTENT QUALITY
AND PERSONALIZATION**

Why it matters

85% of high performers rate their content as excellent/
very good compared to 27% of low performers.

Implementation tip

Map existing content to buyer journey stages and
personas, identify gaps, and develop a content
calendar that prioritizes creating high-impact assets.

Take action

1 Develop content that addresses specific buying group
roles and stages

2 Implement data-driven personalization across channels

3 Focus on relevance over volume

4 Use AI to create content and scale personalization efforts

Recomendations

Audience Engagement

RECOMMENDATION 6: IMPROVE TARGET AUDIENCE AND BUYER ENGAGEMENT

Why it matters

72% of high performers consistently reach and engage target audiences compared to 15% of low performers.

Implementation tip

Identify your highest-value segments and develop comprehensive engagement plans specific to each, with multi-channel touchpoints throughout the buyer journey.

Take action

1 Develop more sophisticated audience segmentation and targeting

2 Expand channel mix to ensure comprehensive coverage

3 Invest in buyer persona development and customer insights, and turn to outside providers in a targeted fashion

4 Leverage AI for customer insights and segmentation

Recomendations

Regional

REGIONAL IMPLICATIONS: TAILORED APPROACHES FOR GLOBAL SUCCESS

United States

- Strongest in technology integration (**38%** have streamlined tech stacks and **11%** fully optimized tech stacks)

- Most confident in lead nurturing (**15%** rate as "excellent" and **30%** as "good")

- Weakest in leveraging sales insights for buyer identification (**33%** vs. **44% i**n APAC)

- Least likely to use CRM data for identifying buyers (**49%** vs. **62%** in APAC)

- Priority: Strengthen sales-marketing collaboration and data utilization

UK/Europe:

- Strongest in identifying individuals in buying groups (**52%**)

- Most developed in market analysis (**56%** prioritize this in formulating strategy vs. **46%** in US)

- Most impacted by lengthening sales cycles (**78%** see longer cycles)

- Priority: Address technology integration gaps while leveraging analytical strengths to shorten sales cycles

APAC:

- Most reliant on CRM data (**62%**) and sales insights (**44%**)

- Lowest confidence in audience targeting (**36%** vs. **47%** in UK/Europe)

- Greatest need for customer insights (**60%** vs. **53%** in US)

- Priority: Invest in foundational elements like audience engagement and tech integration to gain control over diverse audiences and fast-changing economic and buyer contexts

Understanding these regional differences enables global marketing leaders to develop targeted strategies that address specific challenges in each market.

Methodology

2025 State of B2B Pipeline Growth: How B2B Marketers Are Navigating Uncertainty
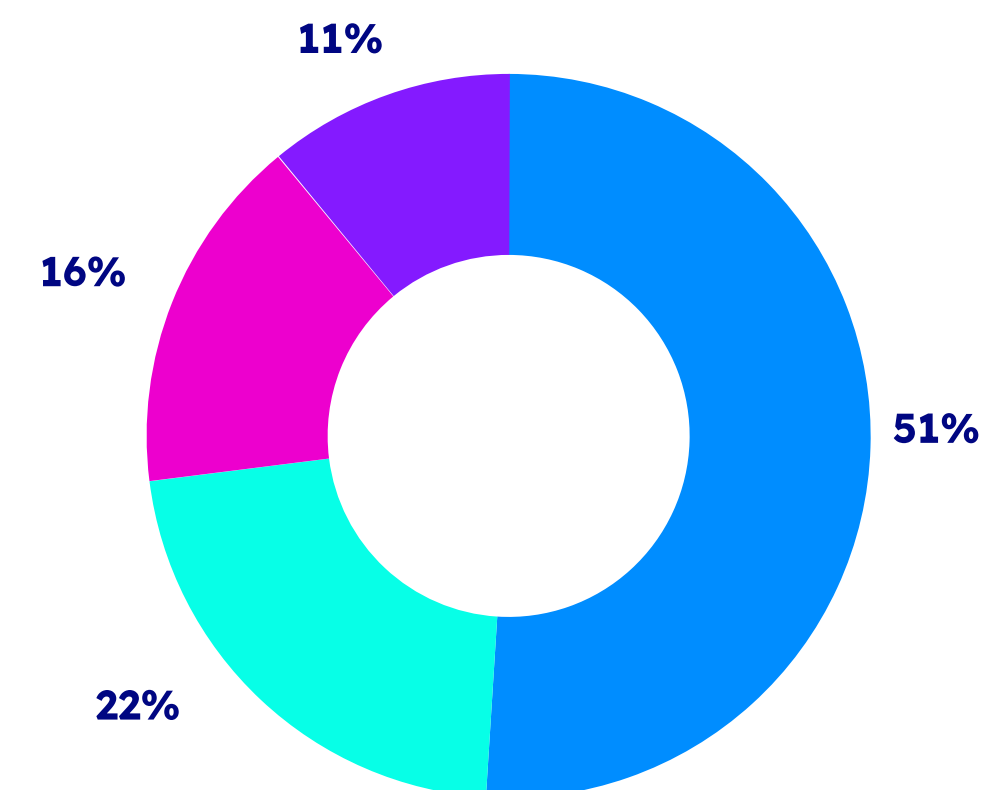
Methodology

Overview

METHODOLOGY

Our research draws on a comprehensive survey of 534 B2B marketing professionals at different companies conducted in February 2025. The respondents were split between the US, UK, Europe, and Asia, with a strong focus on revenue marketing roles, which constituted a plurality of respondents. Survey provider Centiment implemented the survey, and analysis was performed by Leigh Smith, Phd, and head of research at Typeform, and the report was composed by Animalz, a content agency specialized in B2B SaaS content and research.

The quantitative survey was complemented by in-depth conversations with B2B marketers. Thank you in particular to these B2B marketing leaders for their input and insights:

- Fiona McKenzie, CEO at Revere Agency and non-executive director at Wotter

- Maryel Roman, head of digital demand, APAC at Adobe

- Tony Uphoff, Chief Executive Officer at Pipeline360

- Deb Wolf, Chief Marketing Officer at Dataminr and former CMO at Integrate
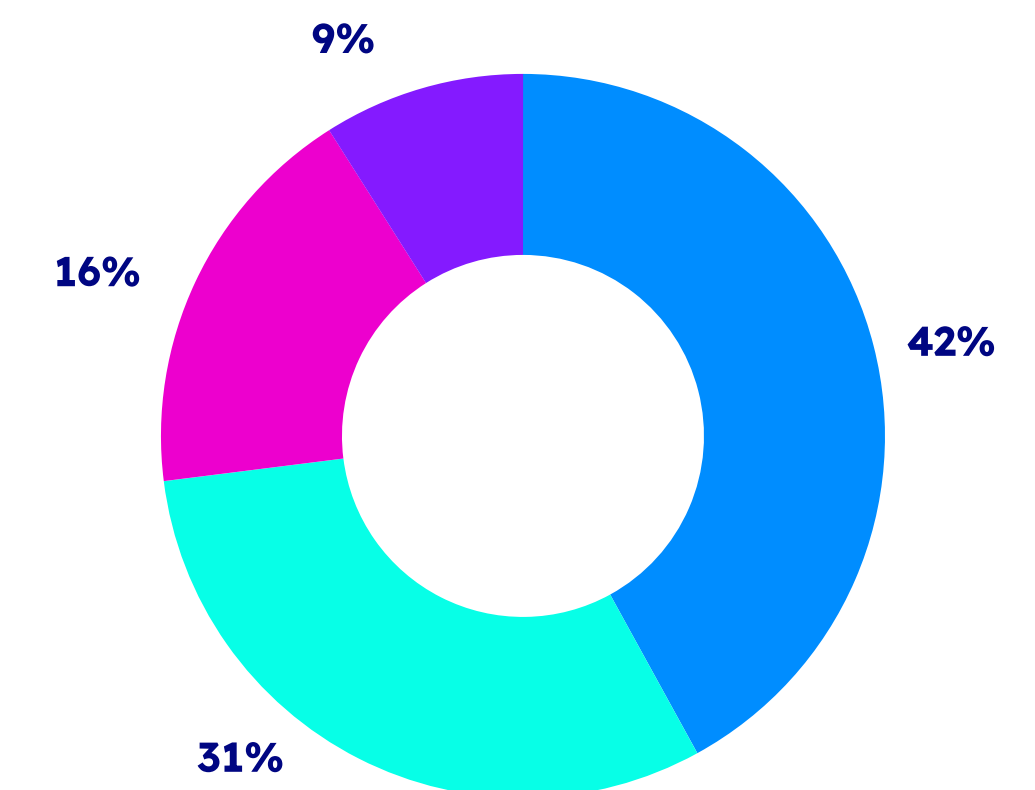
Respondent Roles

11%
16%
51%
22%

Managerial positions   VPs or above

Individual contributors   Directors

Company Revenue

9%
16%
42%
31%

Less than $100M annually $100M-$499M

$500M or more   Unsure

Pipeline360

Methodology

Performance Classification

HIGH VS. LOW PERFORMER CLASSIFICATION

To identify high and low-performing companies, we used a cluster analysis approach based on three key criteria:

High performers indicated significant progress or full achievement of 2024 goals, high job satisfaction, and above-average performance versus competitors.

Low performers showed limited goal progress, lower job satisfaction, and perceived their companies as lagging behind peers.

This methodology allowed us to isolate performance differences while maintaining substantial sample sizes in each group, providing robust data for comparative analysis.

Goal achievement

Progress toward 2024 marketing goals

Job satisfaction

Reported satisfaction with current role

Competitive performance

Self-reported performance versus industry peers

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