

LOOKING BACK TO MOVE FORWARD

*A Year of Lessons from
370+ B2B Leaders*



 The digital
funnel

- 01 The Precision Era of Demand Generation
- 02 Global Shifts in B2B Demand Generation
- 03 The Marketing Channel Evolution Where 2025 Budgets Go
- 04 From ABM → ABX
- 05 SEO → SXO
- 06 Contact-Level Targeting Precision Personalization
- 07 Experience-Led Marketing Beyond Channels
- 08 Offline Marketing's Comeback
- 09 Measuring Success Across Channels
- 10 AI in 2025 — From Awareness to Application
- 11 Social, Content & Community Trends
- 12 The Digital Funnel Perspective



01 The Precision Era of Demand Generation



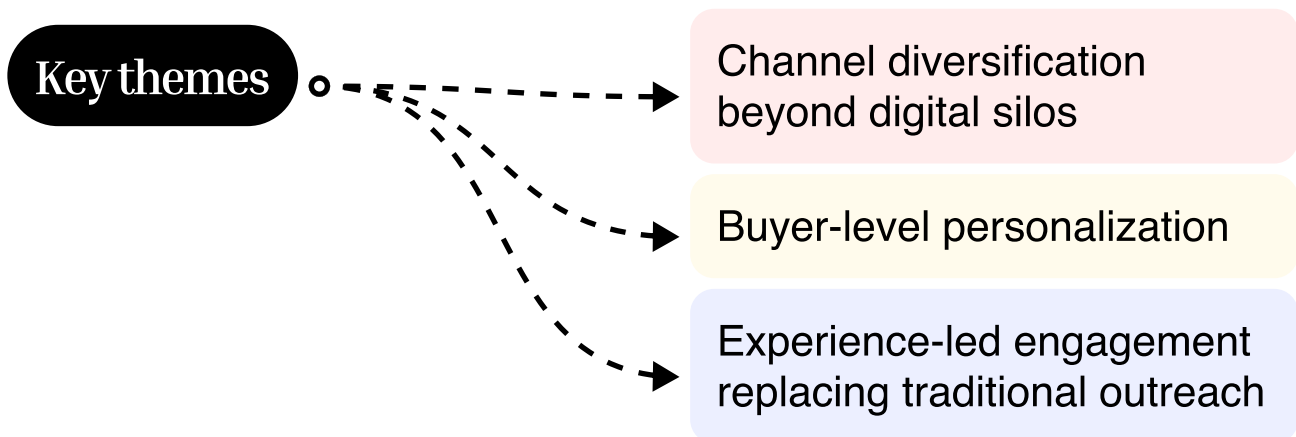
2025 marks a turning point for B2B marketers — the era of precision, where attention, context, and experience matter more than volume. Insights from 370+ marketers across NAM, EMEA, and APAC reveal a shift from broad awareness to intelligent engagement.

"It's not about generating leads.
It's about earning attention."

Why this matters:

- In 2025, attention is the new currency of B2B.
- Buyers don't want another pitch; they want perspective.
- 88% of B2B marketers still rely on email for lead generation, yet only 31% of global users say social ads truly capture attention, down from 43% last year.
- Meanwhile, 75% of B2B teams now use AI to understand behavior, timing, and tone — because context converts, noise doesn't.

At The Digital Funnel, we've seen this shift firsthand: you don't win attention by shouting louder; you win it by saying something that matters, to someone ready to listen. When outreach feels relevant, the response isn't resistance — it's readiness.



An abstract graphic consisting of two overlapping, rounded, teardrop-like shapes. The left shape is primarily blue and green, while the right shape is primarily orange and red. Both shapes have a soft, glowing gradient effect. The background is black with a faint grid pattern.

75%

of B2B teams now use AI to understand buyer behavior, timing, and tone

02 Global Shifts in B2B Demand Generation

Regional highlights reveal divergent strategies across markets, unified by AI adoption and experience-driven engagement.

North America

74%

of marketers use AI-assisted personalization tools

Focus on **intent-driven contact-level targeting** and revenue attribution models.

APAC

58%

of B2B buyers attend at least one in-person brand experience per quarter

Strong adoption of hybrid events and video-first engagement strategies.

EMEA

62%

of campaigns are now multi-language and experience-based

Emphasis on **data compliance, ethical AI, and ABX** (Account-Based Experience).

62%

of campaigns are now multi-language and experience-based



03 The Marketing Channel Evolution Where 2025 Budgets Go



2025 Marketing Channel Overview

CHANNEL	AVG. BUDGET SHARE	TREND & PERFORMANCE
 Paid Search / Search Ads	18% 	High ROI; intent-driven targeting growing with AI
 LinkedIn Ads	14% 	Leading B2B engagement; account-level + contact-level targeting
 Meta Ads	10% 	Stable reach; performance better with AI personalization
 Programmatic Display	10% 	Growth in ABX-driven audience targeting
 YouTube / Video Ads	9%  +65%	Massive YoY growth; long-form community content dominates
 Events & Experiential	9% 	Offline resurgence; hybrid events key for relationships
 Email & Automation	9% 	Stable; AI personalization improves engagement & open rates
 CTV / Connected TV	8% 	Awareness campaigns increasing; high trust with visual storytelling
 TikTok / Emerging Social	6% 	Fastest adoption for creative campaigns; trend-driven engagement
 Pinterest / Visual	4% 	Niche engagement; strong for product storytelling
 Quora, Reddit, Medium	3% 	Thought leadership; educational content resonates
 Spotify / Audio Ads	2% 	Growing; brand storytelling in podcasts & playlists
 Other (PR, Partnerships)	8% 	Stable; supports integrated campaigns

Insight Marketers are balancing high-tech digital channels with high-trust, experience-driven formats. Offline and experiential channels are now part of the full-funnel strategy.

YouTube grew

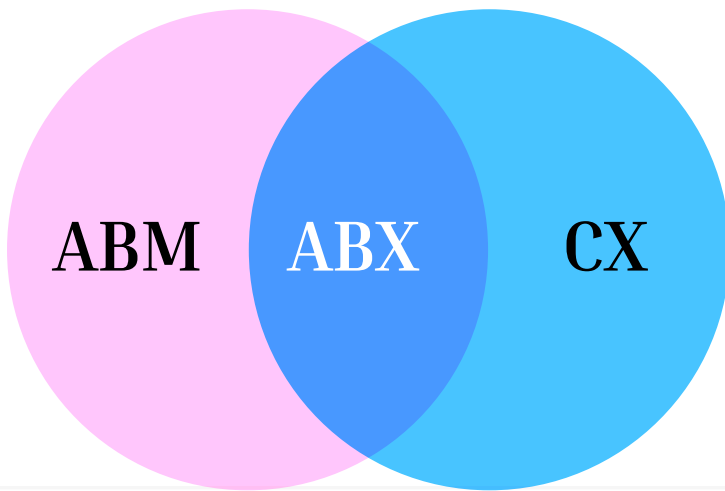
+65%

YoY and is now the #1 platform for
B2B/B2C engagement

04 From ABM → ABX

ABM has evolved --

2025 is the year of **Account-Based Experience (ABX)**.

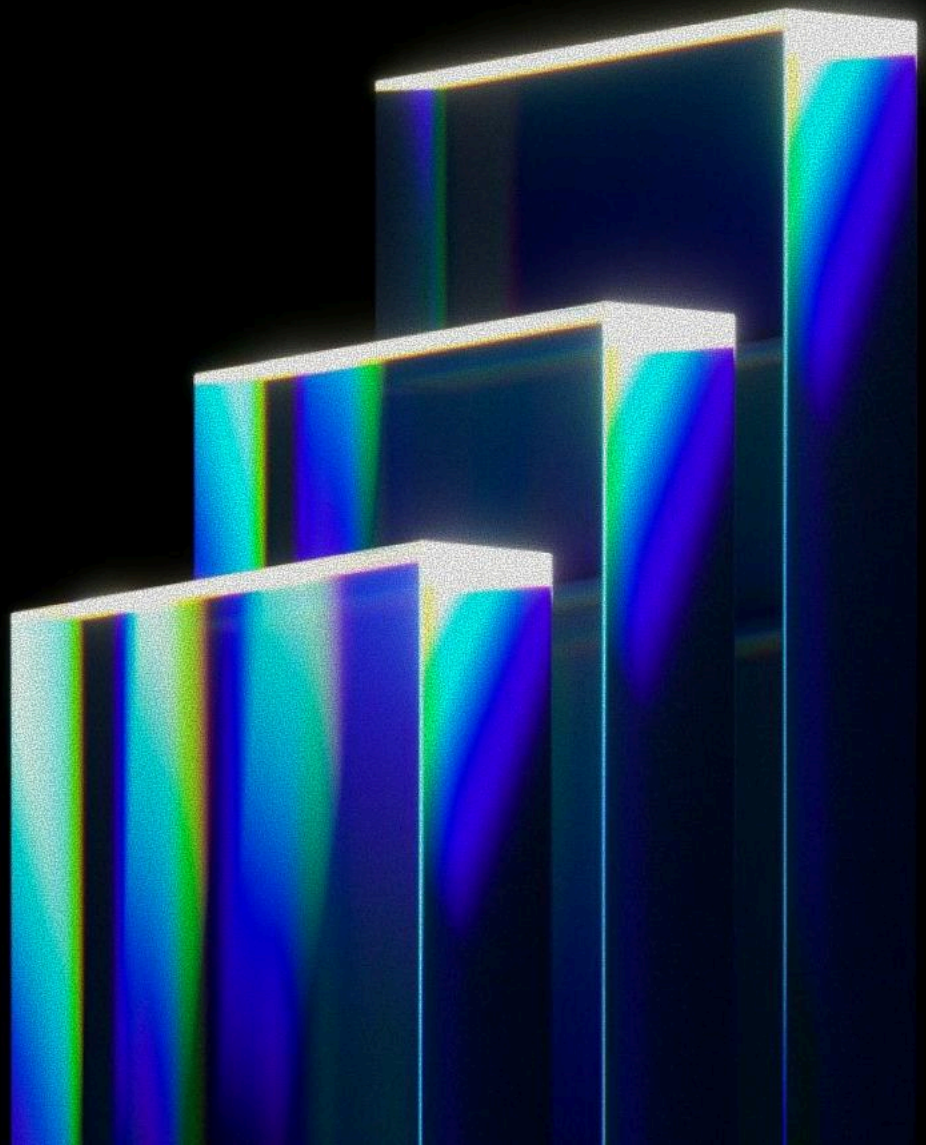


	2020	2025
Methodology	Account-Based Marketing	Account-Based Experience
Focus	Focused on pipeline	Focused on relationships
Approach	Campaign-driven	Lifecycle-driven
Team Structure	Marketing-centric	Cross-functional: Marketing + Sales + CX

ABX campaigns deliver

+33%

faster deal velocity
compared to traditional ABM



05 SEO → SXO

Marketers are shifting from optimizing for search engines to optimizing for **buyer experience**.

SEO

Focused on visibility & traffic.

SXO

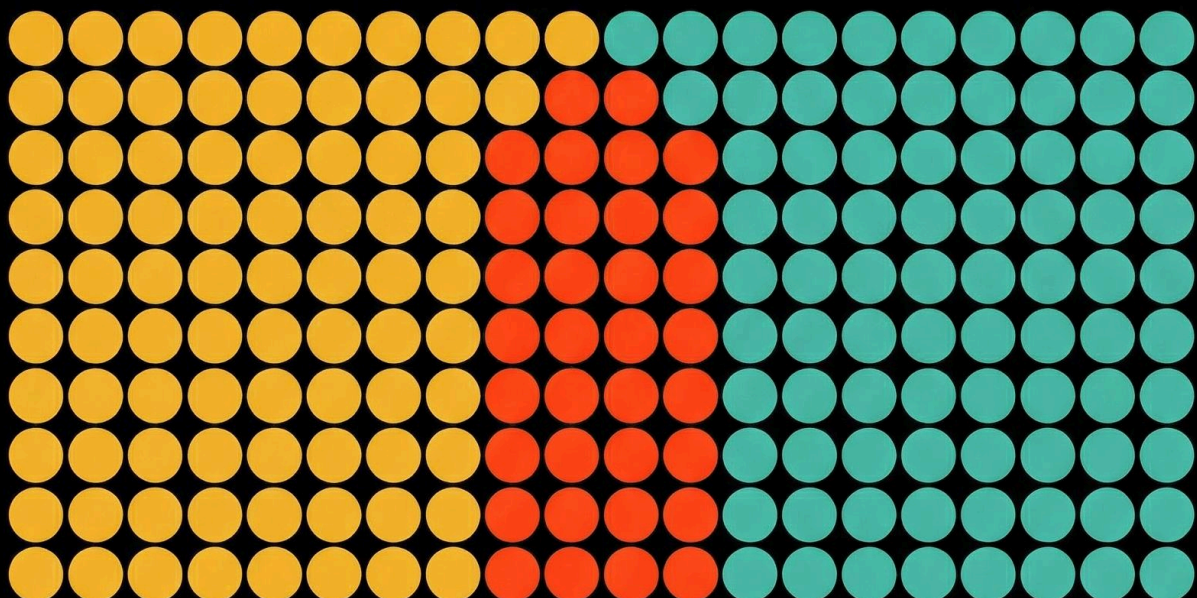
Focused on engagement & conversion.

65% of marketers say search experience (speed, clarity, trust signals) now influences buyer decisions.

SEO

SXO

CRO



SEO drives

748%

ROI and 53% of all
website traffic

06 Contact-Level Targeting Precision Personalization

ABM focused on accounts; 2025 focuses on individual buyers within those accounts.

69% of marketers use contact-level intent signals for tailored messaging.

48% integrate CRM + behavioral data for precise outreach.

36% have automated contact scoring via AI.

IMPACT

↑ **+29%** Engagement rates

↑ **+33%** Faster deal velocity

71%

of marketers use
contact-level intent
signals for tailored
messaging



Precision Personalization: Why It's Time to Stop Marketing to "Accounts"

By Navid Davani, Director of Sales

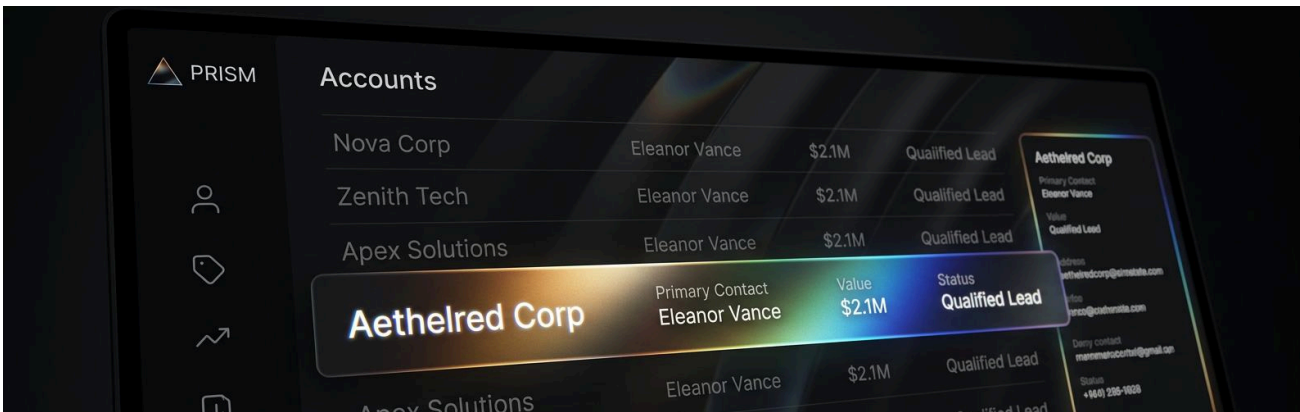
I was looking through the 2025 B2B Demand Generation Report, and one stat jumped out at me: 69% of marketers are now using contact-level intent signals.

But here's the part that actually matters: the teams doing this aren't just "busier", they're seeing a 29% jump in engagement and 33% faster deal velocity. That's not just a minor tweak to the playbook. That's a massive structural advantage.

The Problem with "Generic Precision"

For years, we've patted ourselves on the back for "perfecting" account-based marketing. We got great at segmenting by company size and industry. But there was always a weird contradiction: our outreach was technically "personalized," yet it still felt generic to the person receiving it.

The report highlights why: 48% of marketers have finally bridged the gap between CRM data and behavioral data. Why does that matter? Because companies don't buy software—people do. Inside every target account is a messy ecosystem of different priorities, stresses, and egos. If you aren't talking to those specific human needs, you're just adding to the noise.



Stop Guessing, Start Listening

The market has hit a tipping point. With 36% of marketers now using AI for contact scoring, the leaders in our space aren't guessing who matters anymore.

They're using actual behavior to see:

- What exactly is this person researching?
- How fast are they moving?
- What topics are they obsessed with right now?
- Where do they actually want to talk to us?

When your outreach reflects this, the vibe of the conversation changes. You aren't "interrupting" them anymore; you're joining a conversation they're already having in their head.

How to Move the Needle Right Now

If you want to see that 33% boost in deal speed, here's where I'd start:

1. Audit your logic:

If you're still sending emails based solely on "Company X is in the Finance sector," you're behind. You need to know what Jane specifically did on your site yesterday.

2. Fix the data silos:

CRM data without behavior is a history lesson. Behavior without CRM context is just random noise. You need both to get the timing right.

3. Change the script:

Stop leading with "Here's what we sell." Try leading with perspective.

- Bad: "We have a tool for X."
- Good: "I see your team is navigating [Problem Y]. Here's how other people in your shoes are handling it."

The Bottom Line

Precision isn't about narrowing your list; it's about deepening your relevance.

The winners in 2025 aren't the ones with the best "account lists." They're the ones who actually understand the humans inside those accounts. Most of your competitors are already using these signals—the only question is if you're using them to change your formatting, or to actually change your strategy.

07

Experience-Led Marketing Beyond Channels`

Top 2025 Strategies

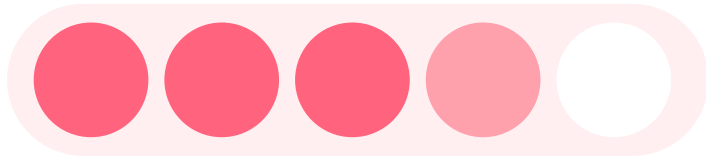
1 Interactive microsites & configurators

2 Hybrid & local events for trust & relationships

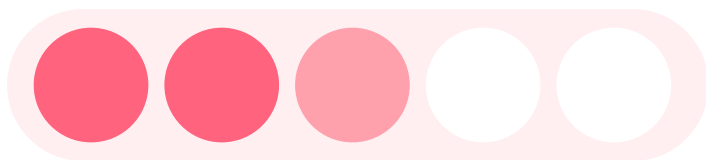
3 Personalized nurture tied to buyer intent

4 Immersive AR/3D demos

08 Offline Marketing's Comeback



71% integrate CRM + behavioral data for precise outreach.



57% of companies increased budgets for events & brand activations.



Rise of NFC-enabled print, smart business cards, and connected direct mail.



Offline Marketing Isn't "Back", It's Better.

By Micah Engel, VP of Sales

I've been tracking a shift lately: 57% of companies are actually increasing their budgets for live events and brand activations. Between smart business cards and "connected" direct mail, offline marketing isn't just making a comeback; it's finally getting a digital brain.

But let's get past the stats. What does this actually mean for you on Monday morning?

Why Digital Isn't Enough Anymore

We've spent years optimizing every pixel and automating every email. But we hit a wall. It's called attention fatigue. We're all surrounded by messaging 24/7, but we've never felt more disconnected from it.

Digital is great for reaching a lot of people quickly, but it's terrible at creating a "moment." Offline experiences—things you can touch, see, and talk to in person, reintroduce the one thing digital dilutes: ***undivided attention***. People don't remember a campaign. They remember a conversation.

The New Rule: No More Silos

Here's the deal: Offline can't be an island anymore. If you're handing out business cards that don't trigger a CRM sequence, or using print that doesn't have a QR journey, you're stuck in 2010.

In 2026, offline is a catalyst. Your booth at a trade show shouldn't just be a place to stand; it should be a data bridge. Every handshake needs to feed back into your digital nurture.



3 Ways to Shift Your Strategy

- **Shift 1:** Stop obsessing over "Footfall." Scanning 500 badges means nothing if none of them move the needle. Start measuring conversation quality and opportunity momentum. Events are intelligence channels, not just fishbowls for business cards.
- **Shift 2:** Train for Chat, Not Pitches. Your team doesn't need a script; they need to practice active listening. What a prospect "clicks" on a website tells you what they're looking at, but a 5-minute conversation tells you why they're stuck. Train your people to spot the friction points that data misses.
- **Shift 3:** Build the Connection First. Before you book that next event, ask: Can we track what happens after they leave the booth? If your offline and digital teams aren't talking, you're leaving money on the table.

Walking the Talk

Look at our setup as a Bronze Sponsor at the Forrester event. We aren't there just to be seen. We're there to turn "cold assumptions" into "genuine signals." We're using QR-led journeys to make sure the value doesn't end when the prospect walks away.

The Bottom Line

The surge in offline spending isn't a trend—it's a correction.

Digital builds reach, but offline builds trust. The 57% of leaders increasing these budgets realize that while attention is scarce, presence earns it. If you want to break through the noise, you have to show up where the noise isn't.



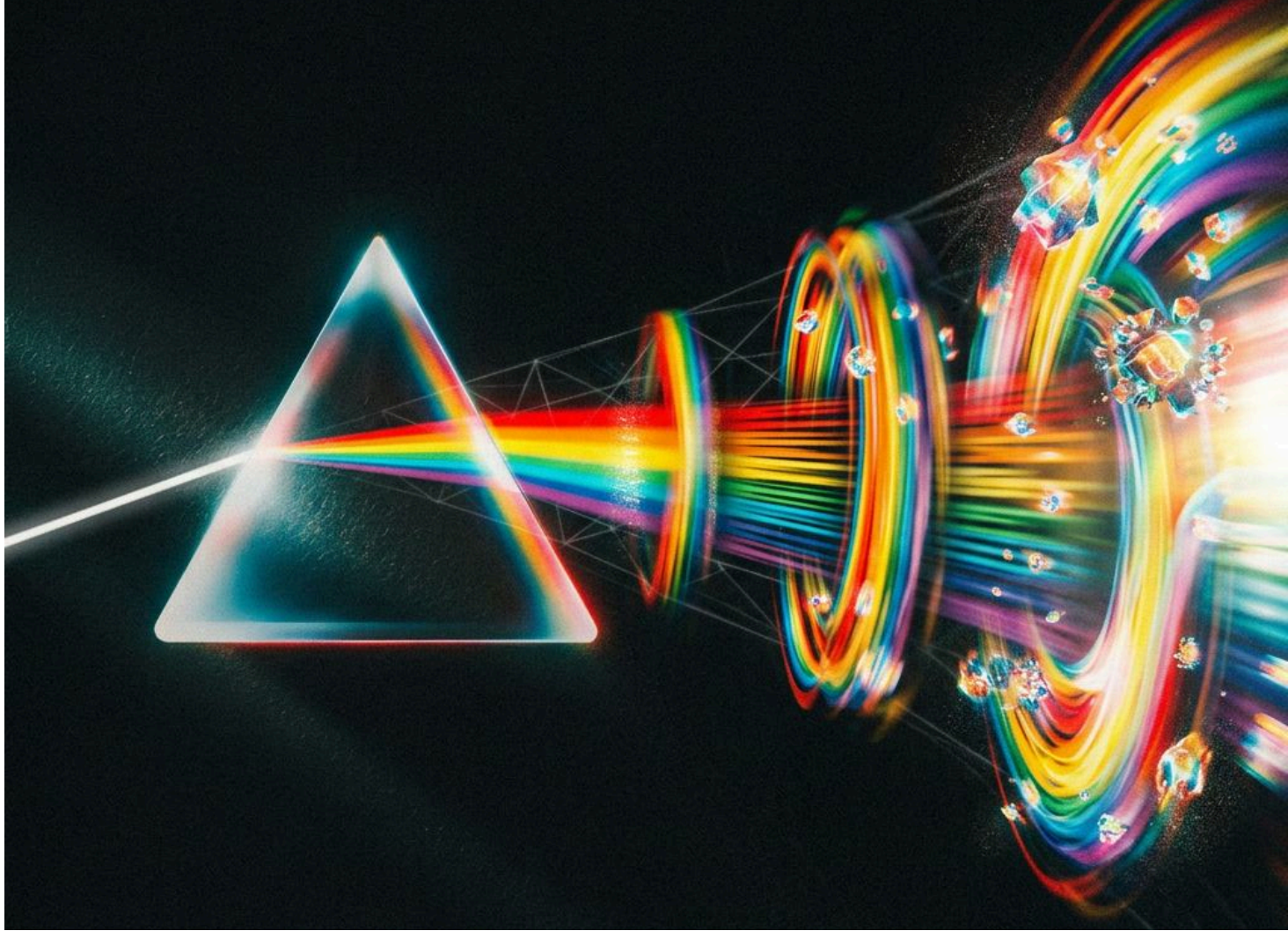
57%

of companies
increased budgets
for events & brand
activations

09 Measuring Success Across Channels

METRIC	2024 FOCUS	2025 FOCUS
1 Lead Volume	Awareness	Pipeline Velocity
2 Engagement	Conversions	Experience
3 Attribution	Last-Touch	Multi-Touch (AI-Driven)
4 ROI	Spend Efficiency	Revenue Contribution





Stop Measuring Activity and Start Measuring Momentum

————— By Patricia Ridad, Senior Campaign Manager

I've spent a lot of time staring at dashboards. Between my years at The Digital Funnel and running campaigns across basically every platform you can think of, I've noticed a frustrating trend: The numbers have never been prettier, but the confusion has never been deeper. We measure everything—opens, clicks, downloads, and attribution paths that look like a bowl of spilled spaghetti. Yet, when leadership asks, "Did this actually work?" we still hesitate.

It's not because we don't have enough data. It's because we're measuring a buyer who doesn't exist anymore.



The "Born-Digital" Buyer

There's one number that explains why your measurement feels broken: 71% of B2B buyers are now Millennials or Gen Z. These aren't people who "learned" digital; they were born into it.

They don't see a line between "online" and "offline." They move through channels like water; finding paths, following pressure, and completely ignoring the silos we've built.

Gartner found that these buyers consume 13 pieces of content before they ever buy. They might see a LinkedIn post (where 50% of 25-to-34-year-olds hang out), watch a TikTok review, then show up at a live event because—let's face it—71% of people still trust you faster in person.

If your measurement is stuck in a silo, you're only seeing 1/13th of the story.

The New Buying Committee

The "decision-maker" isn't just one Boomer EVP in a corner office anymore.

- 50% of managers are Millennials.
- 24% of directors are Millennials.
- Even the C-suite is 23% Millennial now.

You're dealing with a committee that wants a handshake (Boomers), a director who's comfortable everywhere (Gen X), and an analyst who's already watched 10 of your videos before you even knew they were looking (Gen Z).

If you're measuring channels like they're separate countries, you're missing the bridge that connects them.

My Perspective: Data Without Behavior is Just Noise

The smartest teams I'm seeing in 2026 are moving away from "performance" and toward progression. Stop asking, "Was this email efficient?" and start asking, "Did this move the buyer's behavior in a meaningful way?" High open rates are nice, but they don't guarantee intent. Traffic is great, but it doesn't mean momentum.

The 2026 Playbook: Quality Over Quantity

Here is how I'm suggesting my teams rebuild their frameworks:

- **Email:** Stop obsessing over opens. Track conversation starts. Did they actually reply?
- **Paid Media:** Forget the single click. Look at pipeline influence. Is it actually accelerating the deal?
- **Content:** Match the asset to the stage. Whitepapers build trust at the bottom; Infographics build awareness at the top. Measure how deep they're actually reading.
- **Events:** Ignore the "badge scans." Look at post-event engagement lift. Did they actually do something after the handshake?



3 Things to Do This Monday

If you want to stop "automating confusion" and start seeing clearly, do these three things:

Connect your systems

Only 32% of marketers have their CRM fully integrated with sales and service. If your systems don't talk, you're flying blind.

Map your generations.

Look at your top accounts. If the committee is mostly Millennials, quit leaning so hard on cold calls and get active on LinkedIn and TikTok.

Add one "Progression" metric.

Pick one channel—say, Email—and stop reporting on opens. Start reporting on response quality. ### The Bottom Line Attribution isn't about "who gets the credit" anymore. It's about clarity. Channels don't win deals—experiences do. If your metrics aren't influencing your strategy, they're just fancy noise.

**Cut the noise.
Start there.**

10 AI in 2025 - From Awareness to Application

McKinsey Global Survey Highlights

88% of orgs use AI in ≥ 1 function; only 33% have scaled enterprise-wide.

62% experimenting with AI agents; 23% scaling them.

64% see innovation gains; 45% see higher customer satisfaction; only 39% see EBIT contribution.

Top performers pursue transformation, not just efficiency.

Workforce impact

32%

expect reductions; 13% expansions; AI engineers and data scientists remain in demand.

51%

report negative AI incidents; high performers manage risks better via governance.

Takeaway

Winners treat AI as a **strategic growth enabler**, redesign workflows, and align leadership to innovation outcomes.



57%

of companies
increased budgets
for events & brand
activations

11 Social, Content & Community Trends

Key Shifts



Social Search Dominates

84% of consumers now search brands via social platforms.



Relationships > Reach

76% of marketers say authentic content outperforms produced campaigns; 85% prioritize active communities.



YouTube Leads

+65% YoY growth; now #1 platform for B2B/B2C.



AI is the Secret Weapon

71% of marketers use AI for social; 75% say it boosts creativity.



ROI is Measurable

88% confident in social ROI, only 32% have integrated CRM + sales + service data fully.



88%
88%

confident in social
ROI, yet only 32%
have integrated
CRM + sales +
service data fully

12 The Digital Funnel Perspective

At The Digital Funnel we help marketers translate intent into intelligence across all channels. This year's report highlights how the landscape is shifting:

01 AI + ML are now central to interpreting buyer signals

Cross-channel behavior is expanding across LinkedIn, Meta, TikTok, YouTube, Spotify, Pinterest, Quora, Reddit, Display, CTV, email, and landing pages

02

03 **Experience-led marketing is redefining the funnel** — SEO evolving into SXO, ABM into ABX, and digital strategies integrating more closely with offline touchpoints

Hybrid journeys are becoming the new norm, blending online and offline interactions seamlessly

04

The future of
demand
generation is

experience-first

data-driven

intent-led

