

INBOUND

2025 B2B Trends

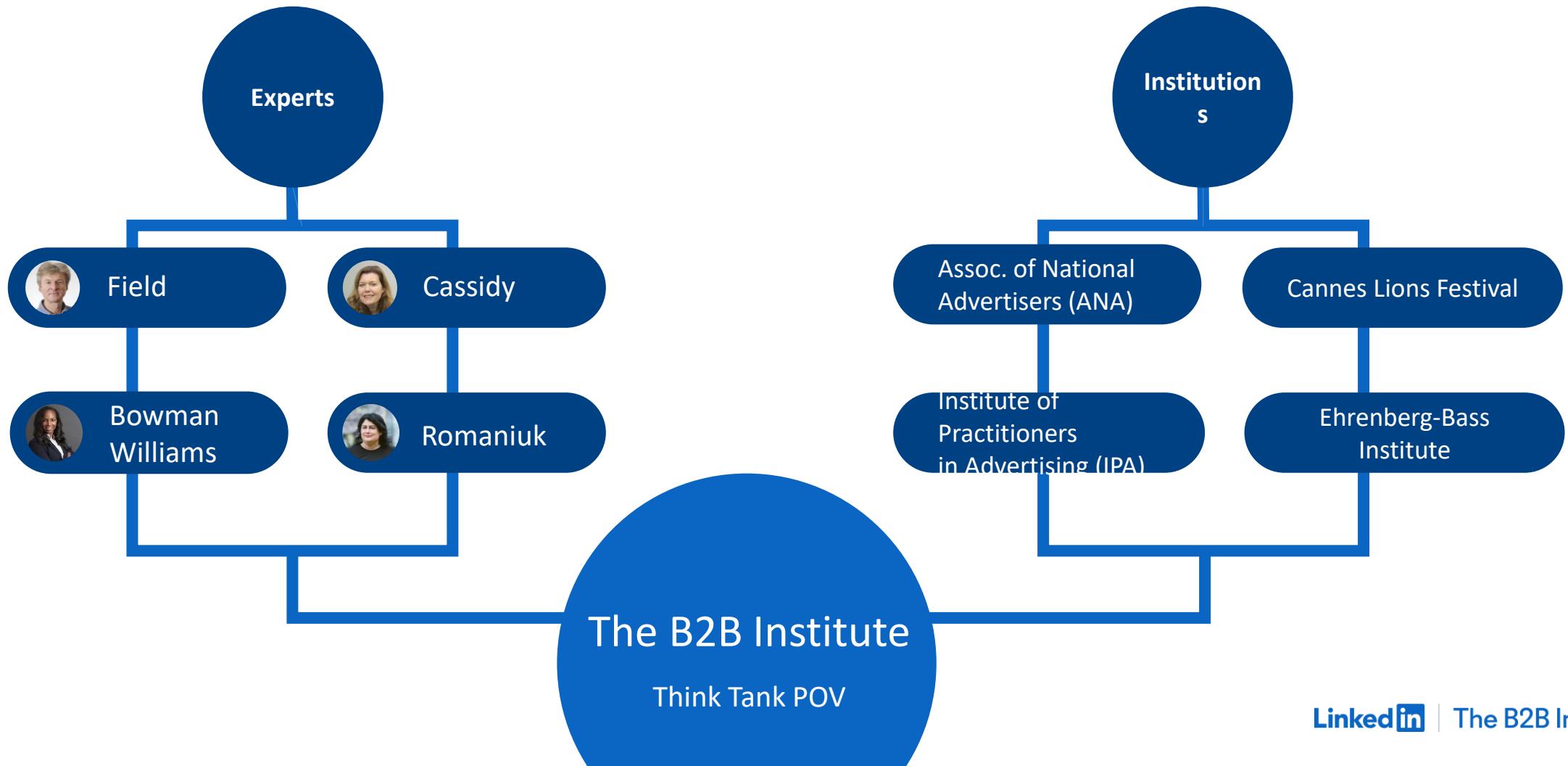
For The Contrarian Marketer



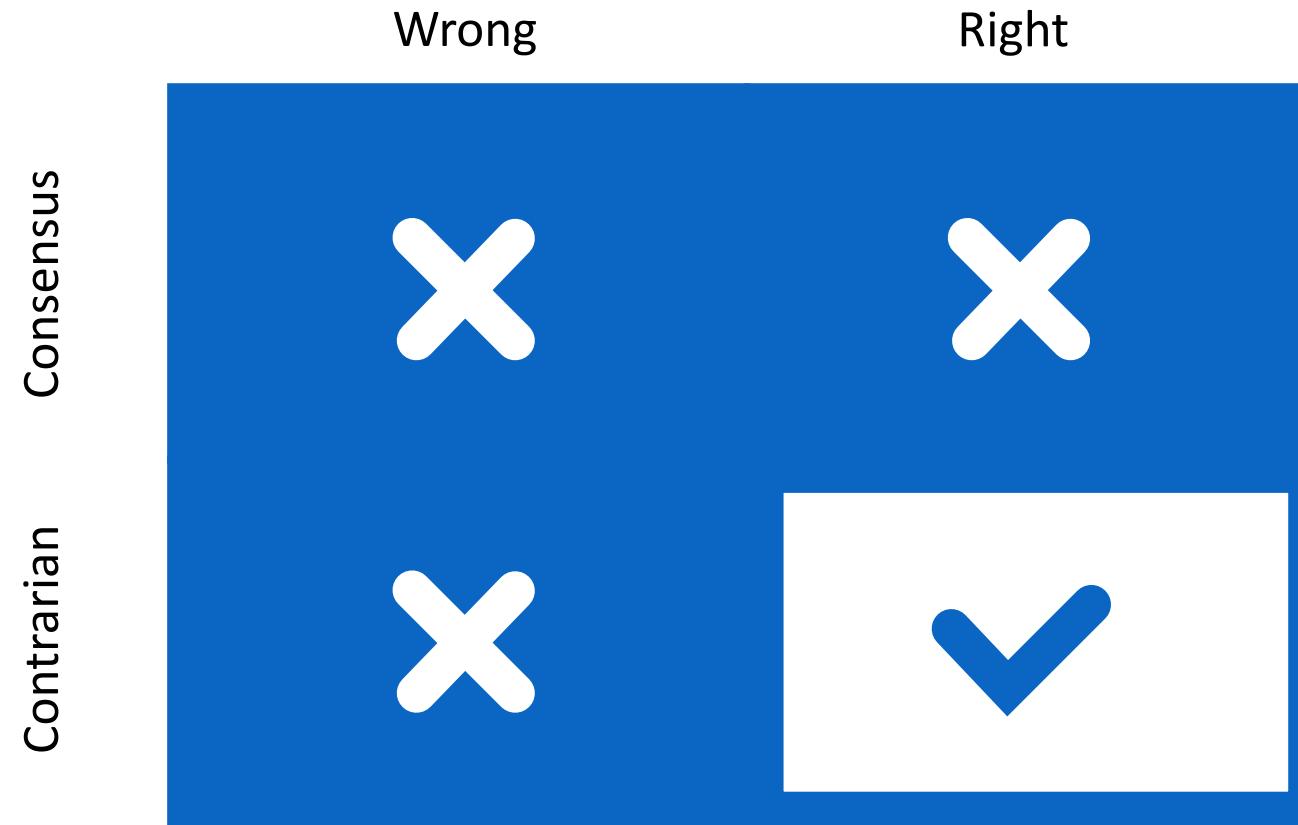
Ty Heath

Director, & Cofounder, The B2B Institute

The B2B Institute Works With Leading Experts And Trade Organizations



To Find A Competitive Edge, Investors Need Be Right When Everyone Else Is Wrong.



The First Impression Rose





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First Impression Rose

Is It Better To Leave A Strong Impression Early On, Or Wait Until The Last Minute To Make A Move?

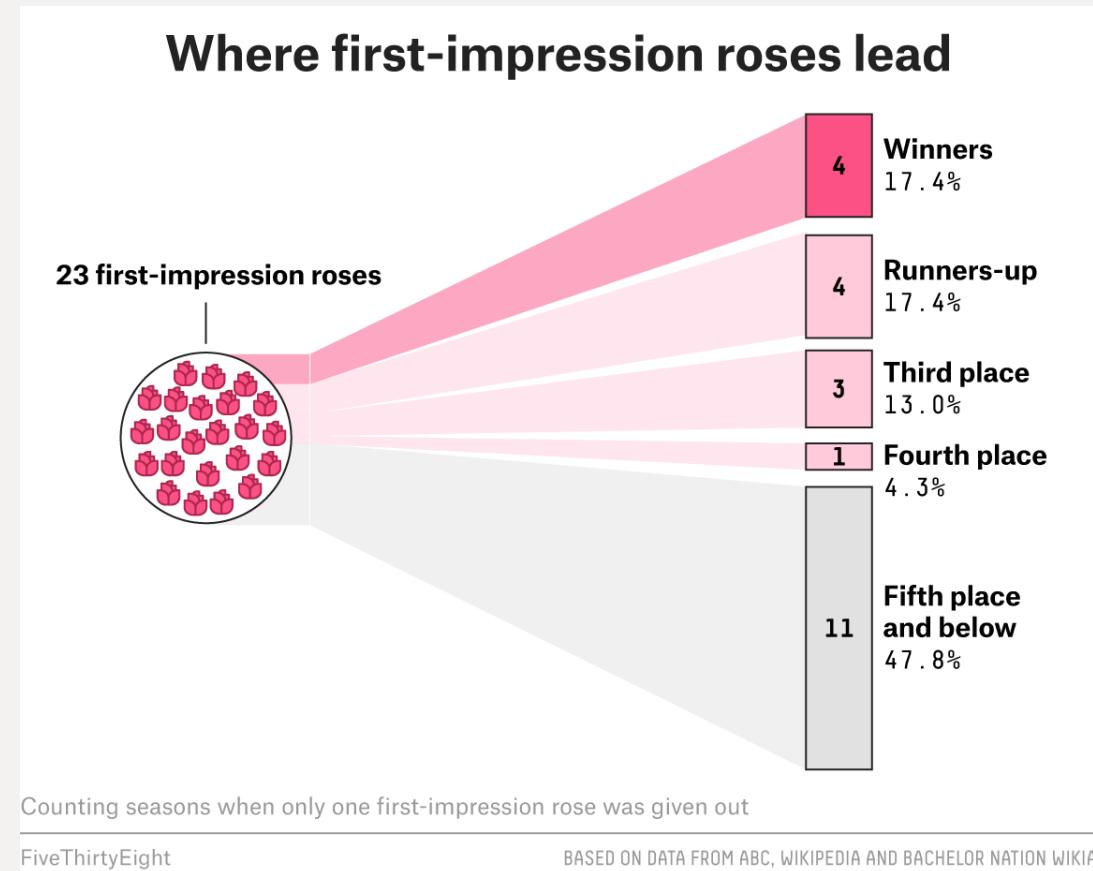
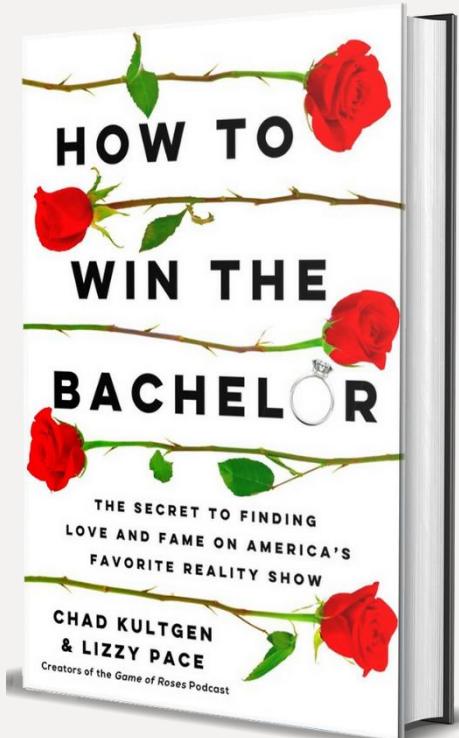


First Impression Rose

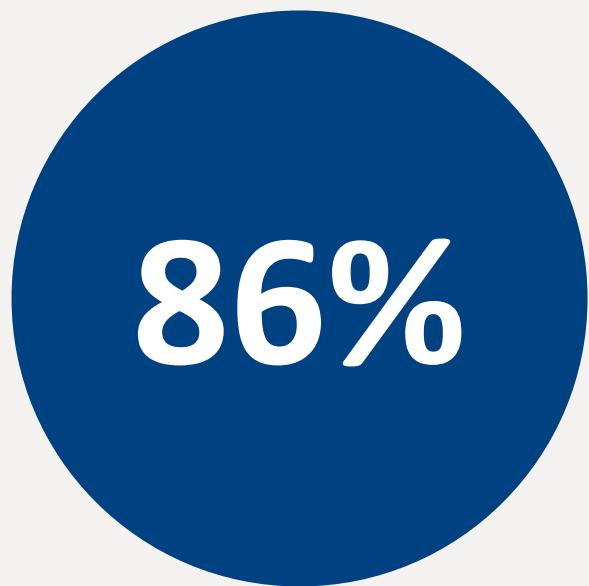


The Bachelor "Steal"

The Bachelor Puts On A Show, But It's A Forgone Conclusion. Whoever Gets The First Rose Usually Goes To The Finale.



B2B Buying Decisions Are Foregone Conclusions Too. Most Buyers Choose A Brand From Their ‘Day 1 List.’



Percentage of B2B Buyers
that start with a “Day One”
list of brands in mind

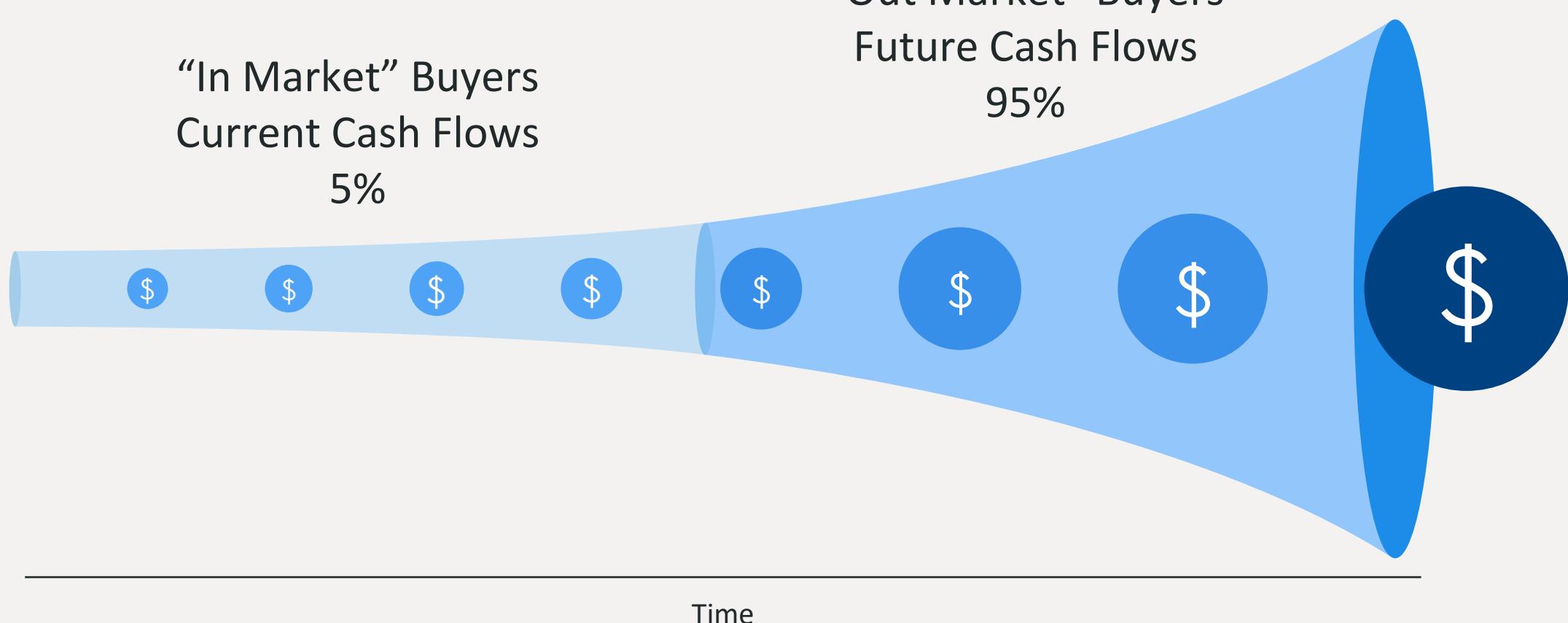


Average number of
brands in B2B Buyers
“Day One” List



Percentage of B2B Buyers
that purchase from
their “Day One” List

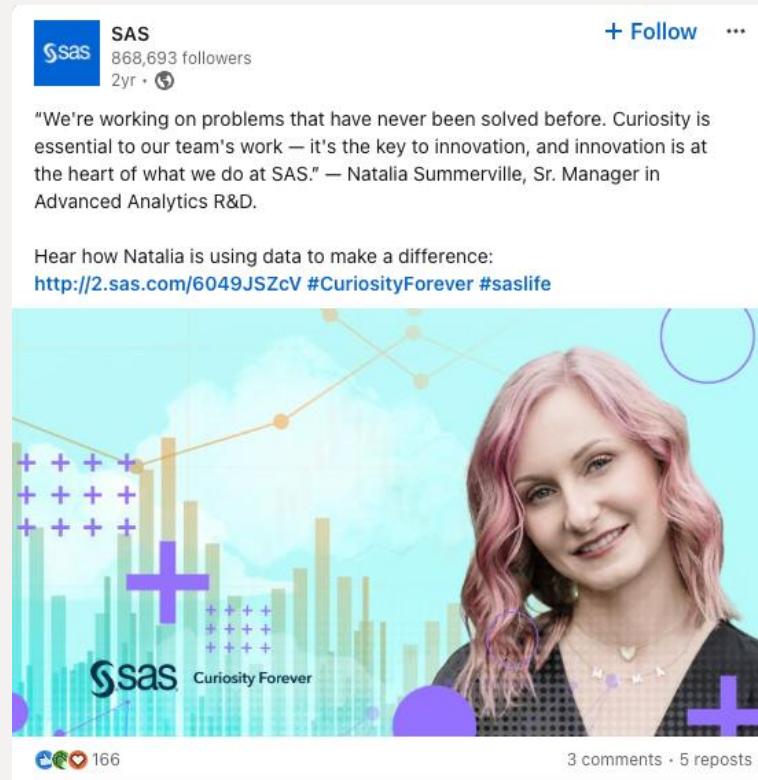
And If They Don't Know You Before Day 1, It's Already Too Late. Build Your Brand Among The 95% Long Before They Buy.



Bold Creative Isn't A Risk – The Risk Is Not Making The Day 1 List.

Make A Strong First Impression With Attentive. Branded Ads.

2021 'Curiosity Forever' Campaign



2024 'Drowning In Data' Campaign



In Summary:



The First Impression Rose

In love and in business,
the rules are the same.
If you're not an early favorite,
you're out of the game.

Deep Thoughts

- Do customers choose the brands they love? Or do they love the brands they choose?

Memory Mix Modeling





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Memory Mix Modeling

When It Comes To Measurement Models, B2B Marketers Choose “Clickability” Over “Memorability.”

Which Ad Is More Likely To Get More Clicks?



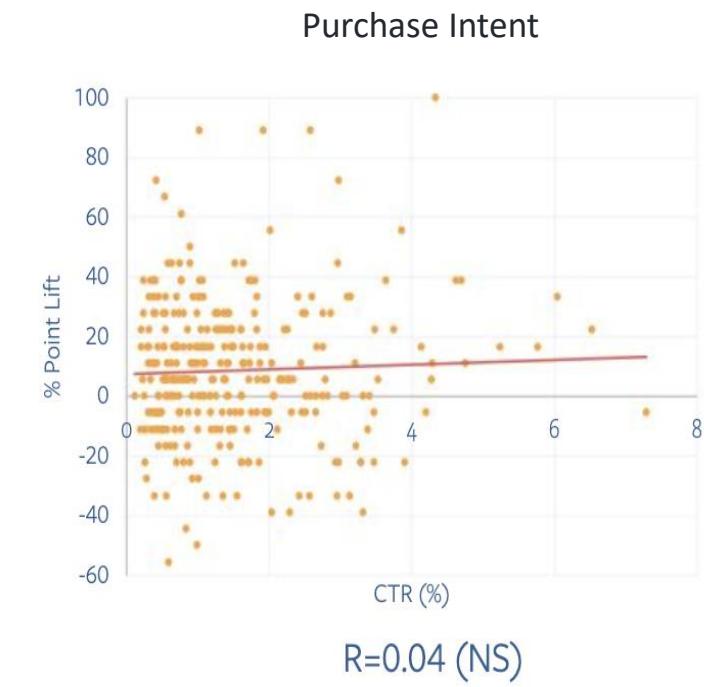
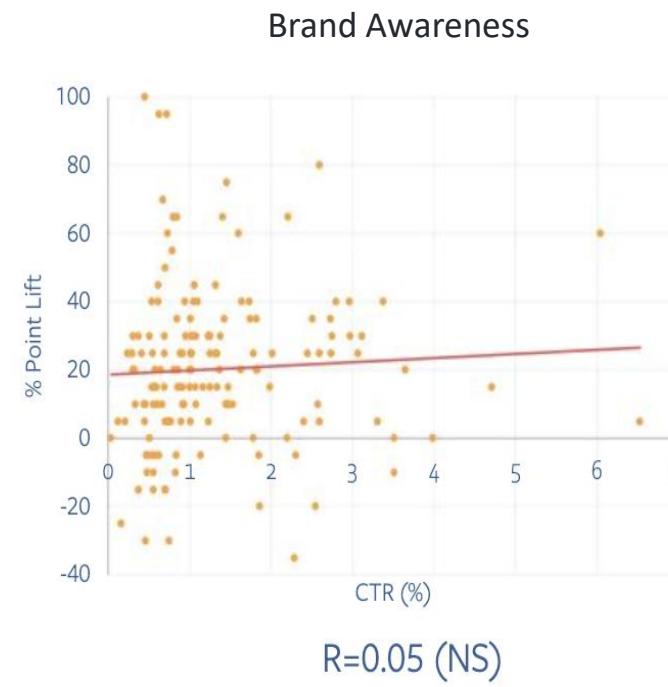
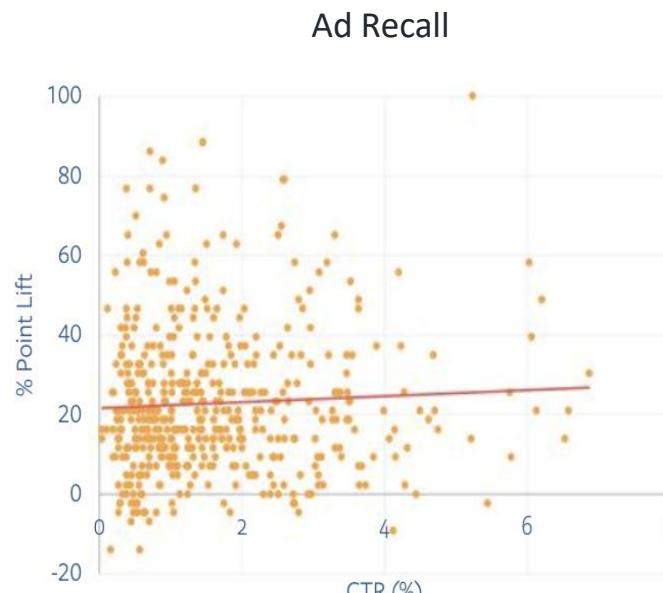
89%
of CEOs agree that
our bubbly brown
beverage solves
their thirst problem!!

CLICK HERE AND ACT NOW

And fill out an incredibly long form



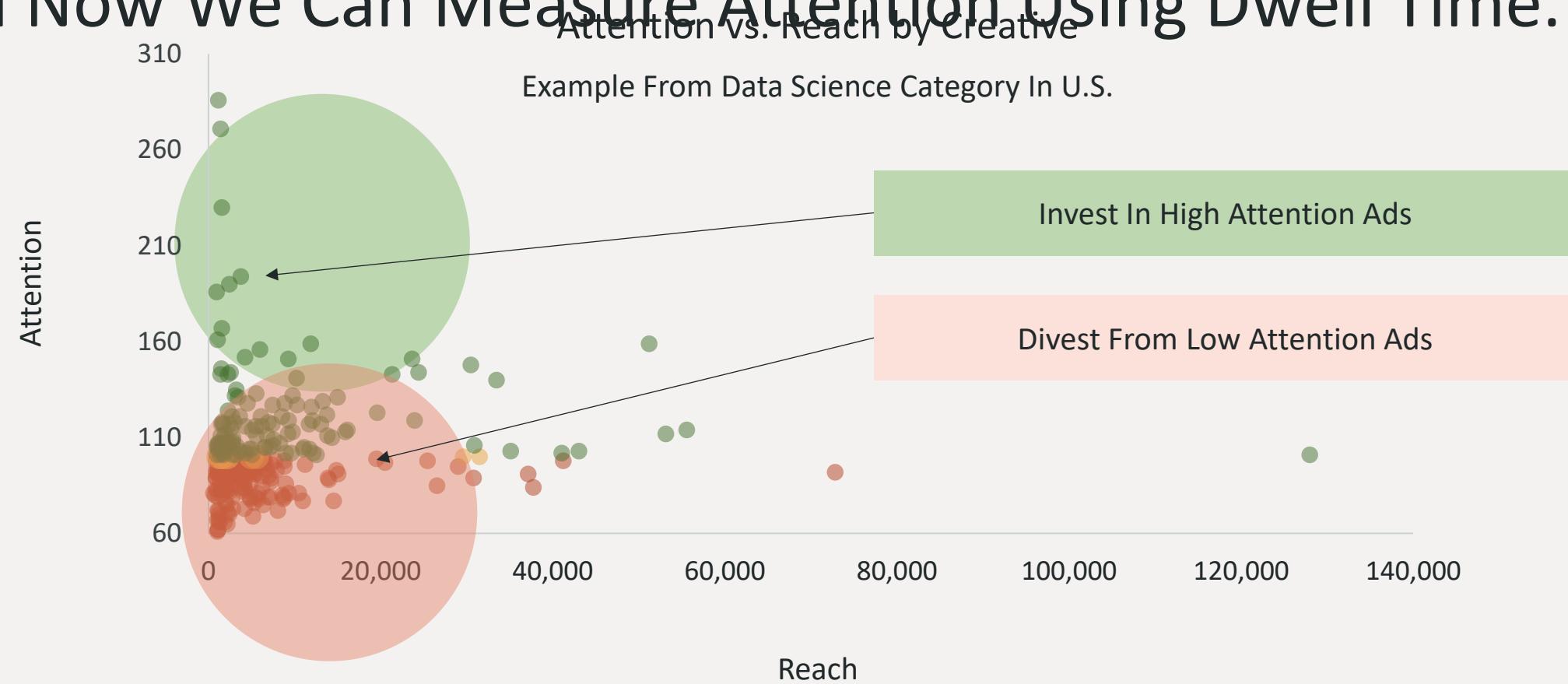
But Clicks Are The Wrong Metric. You Can Get A Click Without Making A Memory.



No Strong Correlations Emerge Between CTR and Any of the Nielsen BrandEffect Metrics

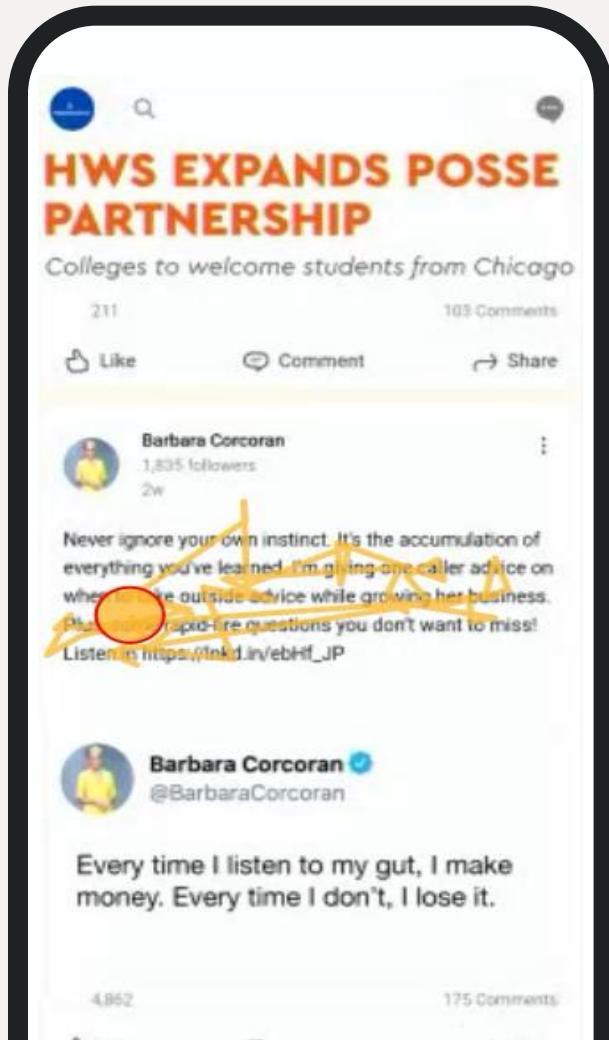
Attention Is The Right Metric. Attention Helps Build Memories.

And Now We Can Measure Attention Using Dwell Time.



Reach defined as >0 impressions in time frame. Attention defined as total time spent with ad indexed against peer set. 2022-02-01 through 2023-02-28.

Attention Isn't Straightforward – It's Fleeting And Fragmented. But Even Passive Attention Can Generate Big Results.



Ad
On-screen for
12.3s*

Buyer
pays attention
3.7s

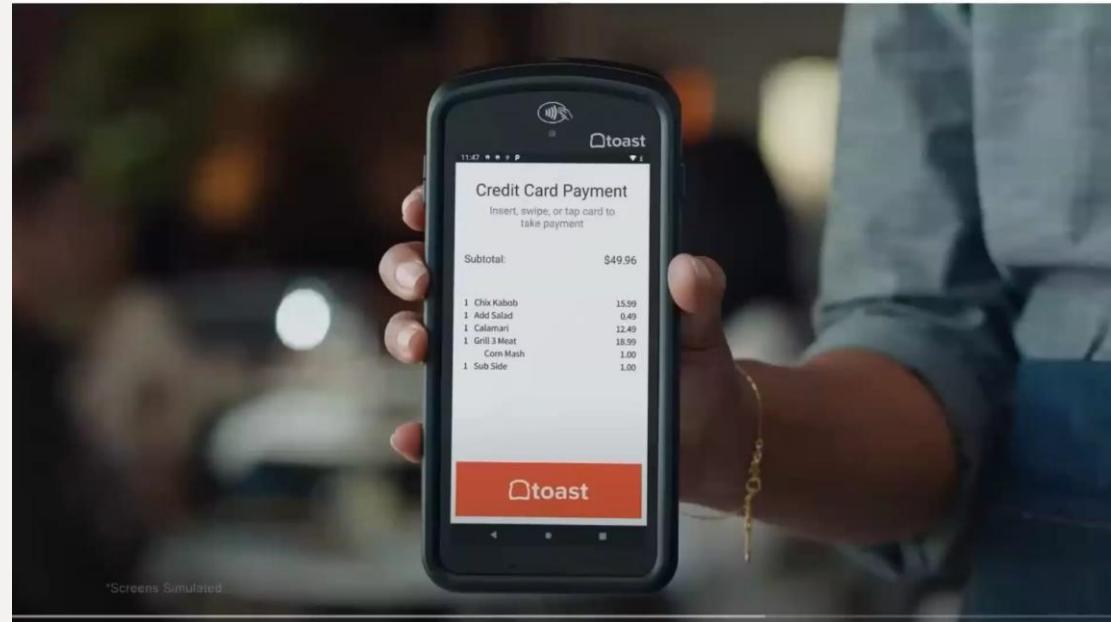
Buyer
switches focus
2.4x

*Similar to metric to our LinkedIn Dwell time analysis. MRC standard: 50% of ad pixels in view.

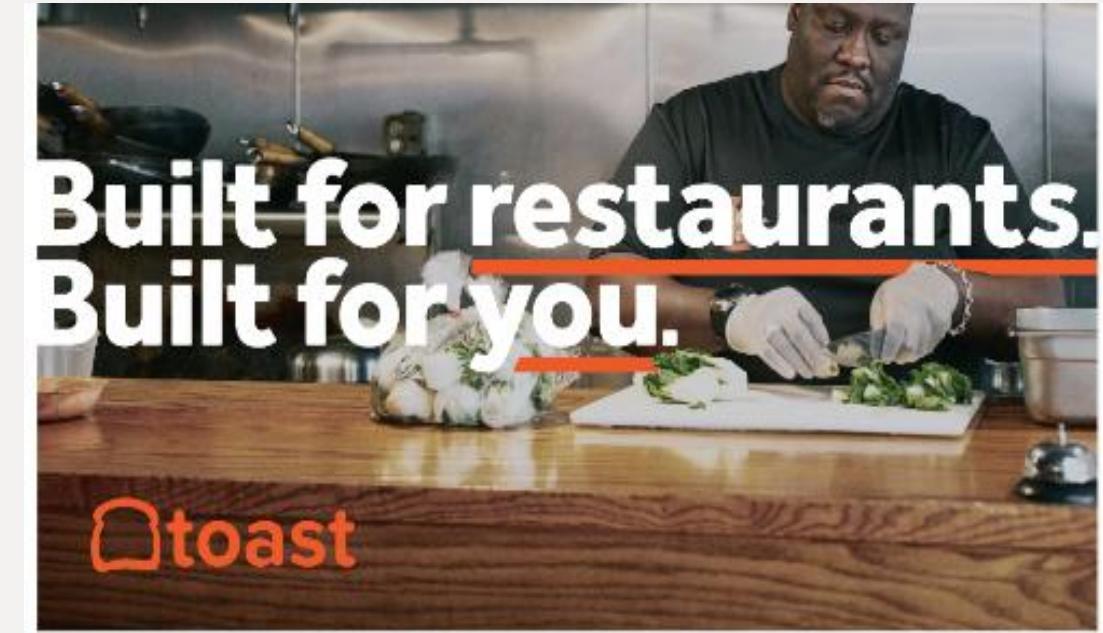
Source: LinkedIn's B2Bi & MediaScience B2B Creative Effectiveness Study, Feb-April 2023, April-May 2024, N=770, Geo: US

Because When It Comes To Memory Generation, Marketers Need To Both Build And Maintain Memories.

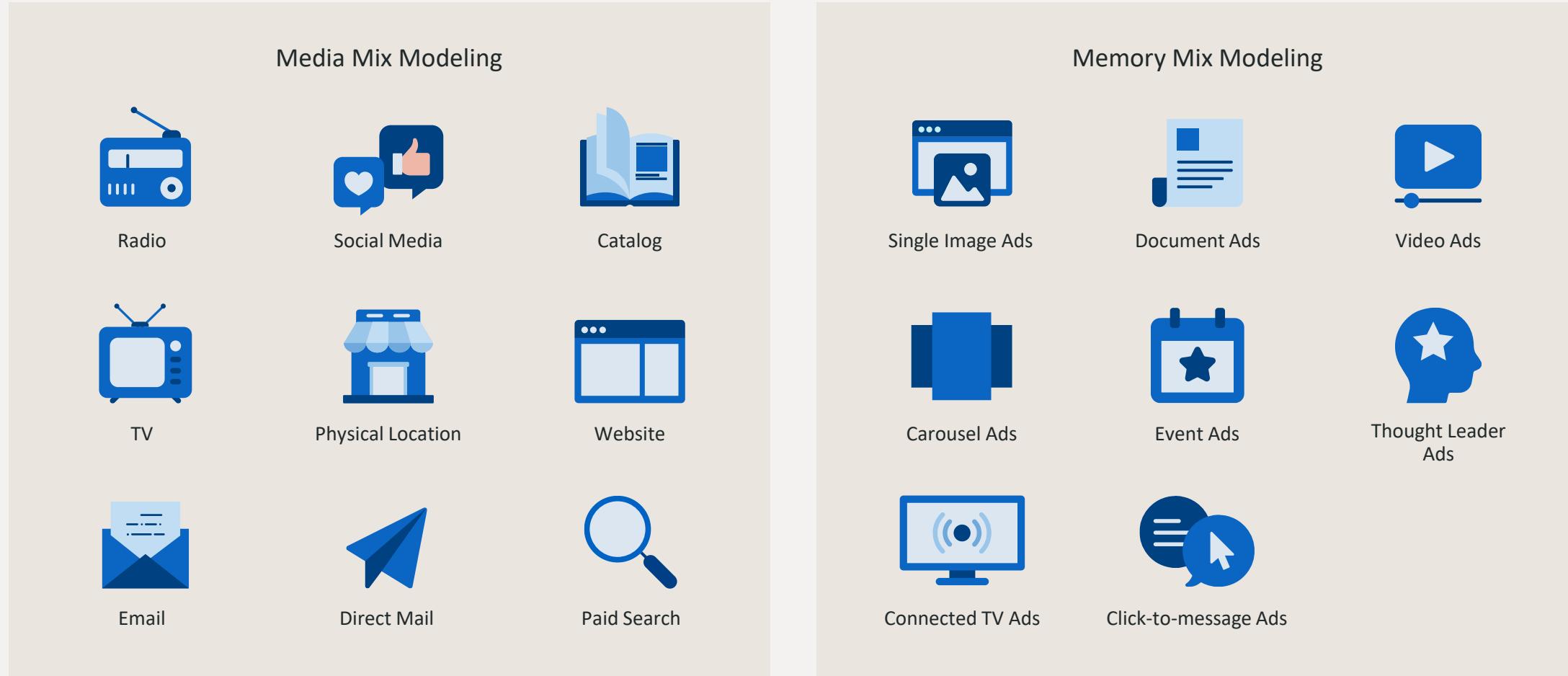
LinkedIn Video = Active Attention
Goal: Build Memories



LinkedIn Static = Passive Attention
Goal: Maintain Memories



Just Like Different Channels Serve Different Media Objectives, Different Formats Serve Different Memory Objectives.



In Summary:



Memory Mix Modeling

Just Like Different Channels Serve Different Media Objectives,

Different Formats Serve Different Memory Objectives.

Deep Thoughts

- Do customers remember what they pay attention to do they pay attention to what they already remember?

The Sea Of Sameness





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The Sea of Sameness

Which Of These Logos Do You Notice First?

In Social Science, We Call This The “Van Restorff Effect”...



Can You Match Each Cloud Brand To Its Color?

1) IBM

A

2) Dell

B

3) Microsoft Azure

C

4) Digital Ocean

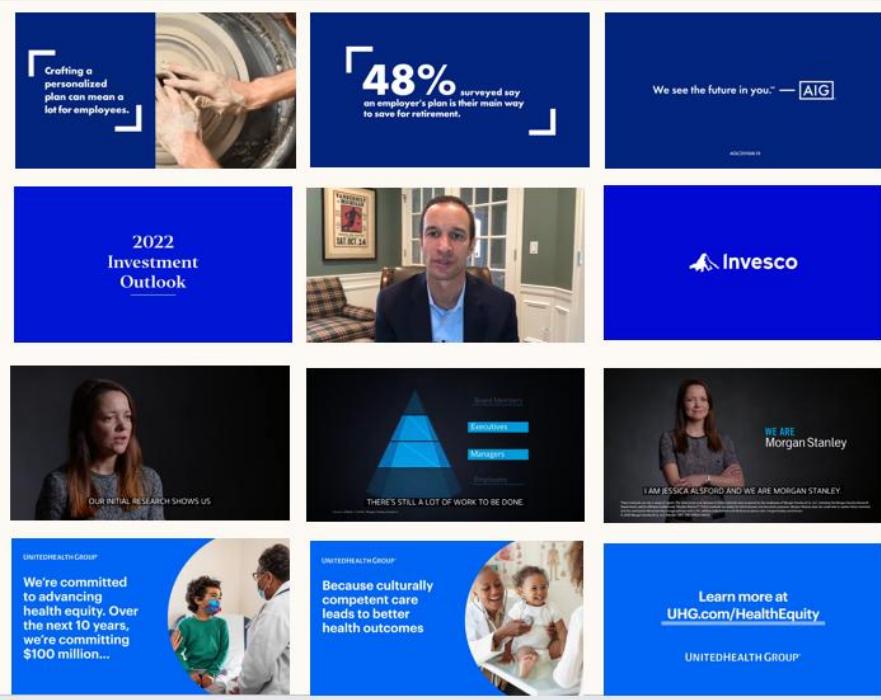
D

5) Qumulo

E

In B2B, Brands Are Drowning In A Sea Of Sameness. Our Ads, Websites, And Products All Look The Same.

Financial Services Category



Cloud Category



Dell color

Dell Advertising

Digital Ocean Advertising

Brand Attribution

5%

2%

7%

Misattribution

25%

23%

22%

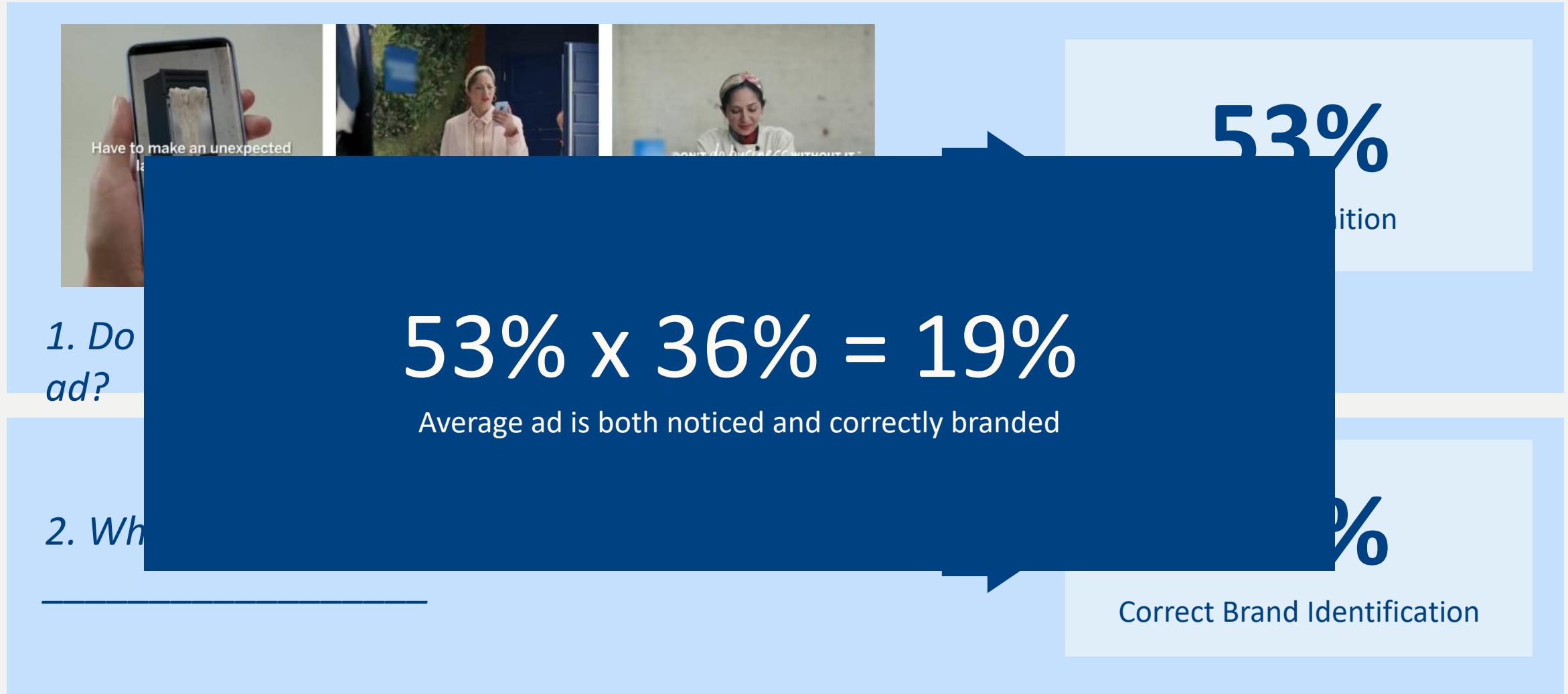
Microsoft 10%
Amazon 3%
IBM 3%

Microsoft 11%
Amazon 4%
IBM 3%

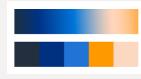
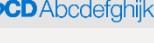
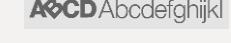
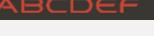
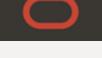
Amazon 7%
Microsoft 3%

Source: Distinctive BAT Research in partnership with the B2B Institute, 2022

81% Of B2B Ads Are Drowning In The Sea Of Sameness.



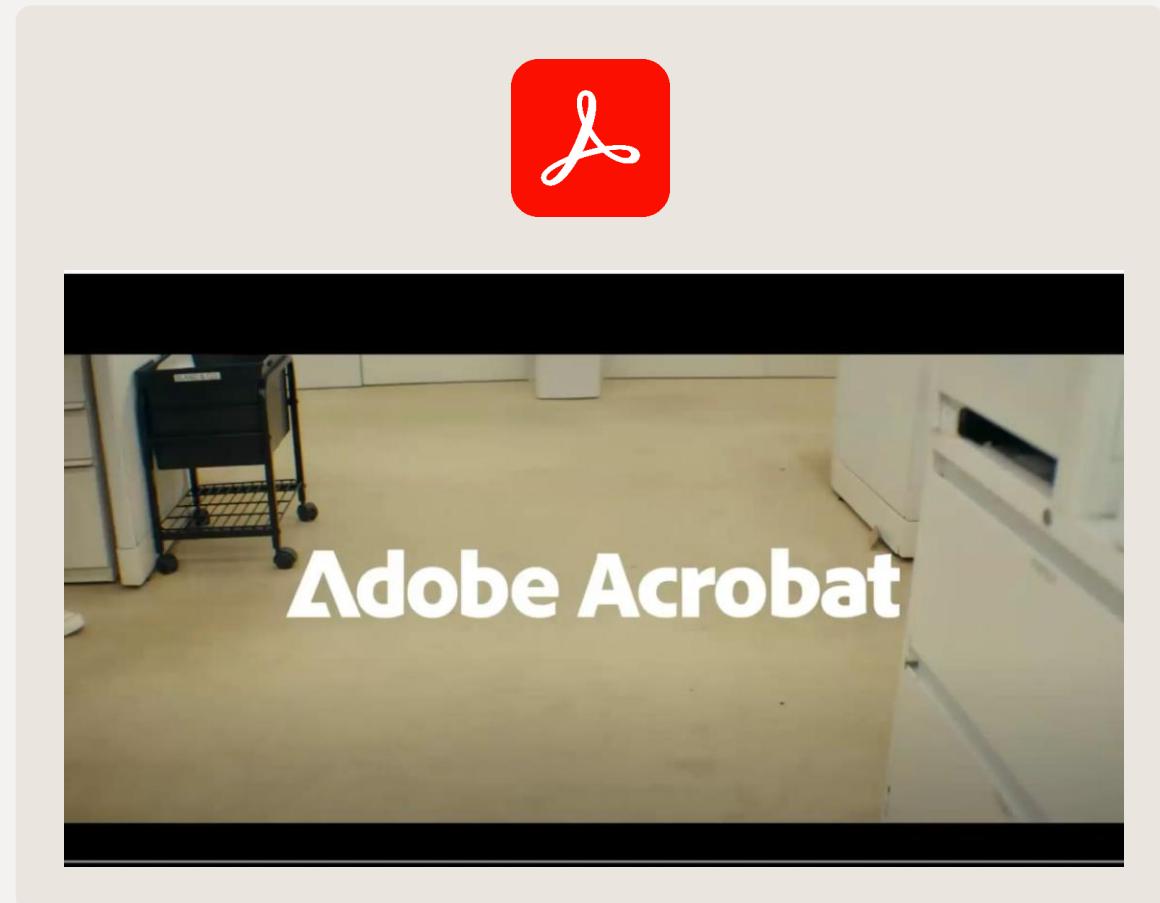
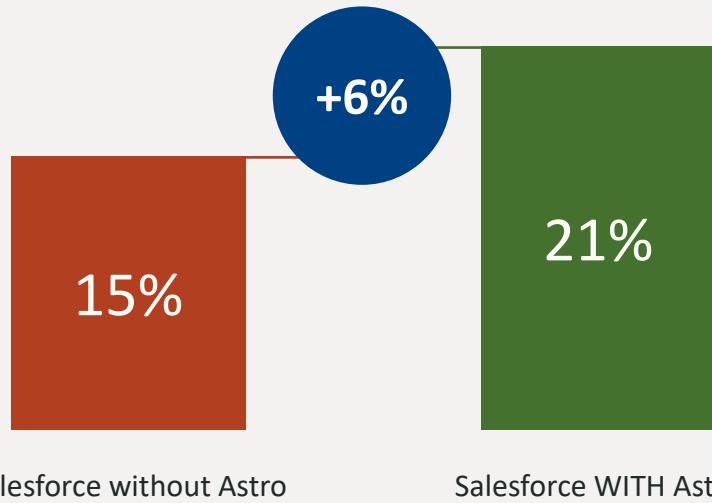
There Are Many Life Preservers At A Marketer's Disposal. Stay Afloat By Investing In Distinctive Assets.

Brand	Logo	Logo Greyscale	Color	Brand Marks or Characters	Advertising	Tagline	Website/ Dashboard
AWS					New creative X2, with smile and without smile		
Cloudflare				 	 		
Microsoft Azure	 Abcdefghi Abcde	 Abcdefghi Abcde		  	 		
Dell	 					The power to do more	
Oracle	 ABCDEF	 ABCDEF		   ABCDEF			
Digital Ocean	 AbcdefgAbcde	 AbcdefgAbcde		 	 		
HPE	 Abcdefg Abcdefg Abcdefghij	 Abcdefg Abcdefg Abcdefghij					
Qumulo	 Abcdef	 Abcdef		 	 		

Source: Distinctive BAT Cloud Research in partnership with the B2B Institute, 2022-2023

And Take Advantage Of The Most Overlooked Asset: Characters. They Can Be Animations Or Spokespeople...

Characters Drive Brand Attribution Lift



Or Your Own Execs And Employees. Use Thought Leaders As Characters To Stand Out.



“When presented with the opportunity to trial Thought Leadership Ads, we immediately agreed... **One of our executives was delighted to wake up to more than 500 notifications on the first day!**”

Barkha Patel

Senior Vice President, Communications, Asia Pacific Mastercard



In Summary:



Sea of Sameness

81% Of Ads Are Drowning In The
Sea of Sameness

Distinctive Brand Assets
Keep Brands Afloat

Deep Thoughts

- Why does the Sea of Sameness plague B2B specifically?

The Search For Similarities





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Search for Similarities

Once Upon A Time, Scientists Had 100s Of Names For Bees.

Their Segmentation System Was Too Complex To Work.



*Apis pubescens, thorace
subgriseo, abdomine fusco,
pedibus posticus glabis,
untrinque margine ciliatus*

But There Are Few Differences Across Customer Bases.

Complex Segmentation Does Not Deliver Better Returns.

Brand	Years of Operation				Primary Area of Business						
	Pen %	<5 Yrs	5-9 Yrs	10+ Yrs	Professional Services	Construction / Manufacturing	Financial/ Real Estate	Retail	Healthcare	Other	
Google (GCP)	41	19	25	55	22	19	7	7	4	41	
Amazon (AWS)	40	14	29	57	25	24	6	6	6	32	
Microsoft Azure	38	13	23	63	27	21	6	8	7	30	
IBM Cloud	34	14	25	61	27	21	6	8	4	34	
Oracle	20	10	27	64	32	13	11	6	3	35	
Cloudflare	11	22	33	44	19	22	8	8	3	36	
Alibaba Cloud	10	10	32	58	13	42	7	3	0	36	
Digital Ocean	10	26	48	26	10	26	7	10	3	45	
HPE	5	7	33	60	13	27	0	0	20	40	
Linode	4	25	17	58	33	33	0	0	8	25	
Rackspace	3	0	0	100	40	20	10	0	0	30	
Category Average %		14	27	59	24	24	6	5	5	35	

Source: B2Bi/EBI Analytics Research; Survey data collected Jan-Mar 2022; Sample size n = 318 IT decision makers

We Need To Search For Similarities, Not Differences. Design Big Messages For Big Segments.



Big Law Firms



Solo Practitioners



In-House Legal Teams



Boutique Firms

In Summary:



The Search for Similarities

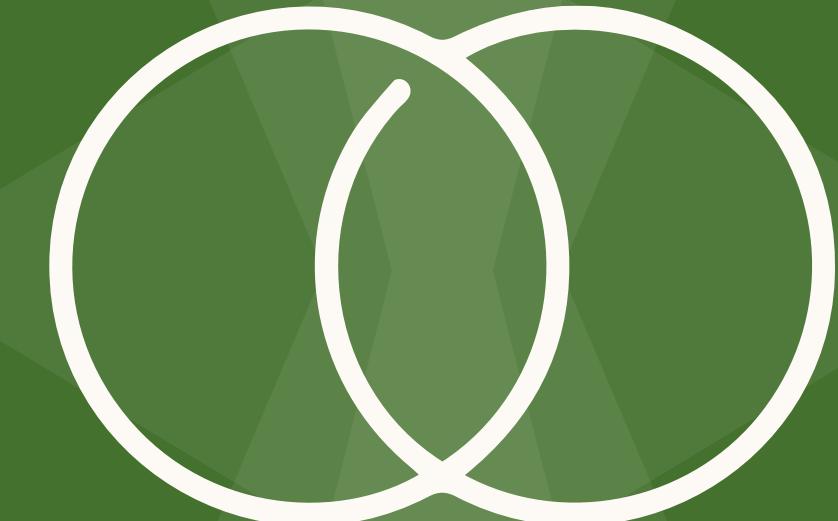
B2B marketers must search for similarities.

Category Entry Points are the strategic similarities across category buyers.

Question to Ponder

- If everyone is messaging around the same common problems, how do brands differentiate themselves and drive innovation?

Circles Of Doom





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Circles of Doom

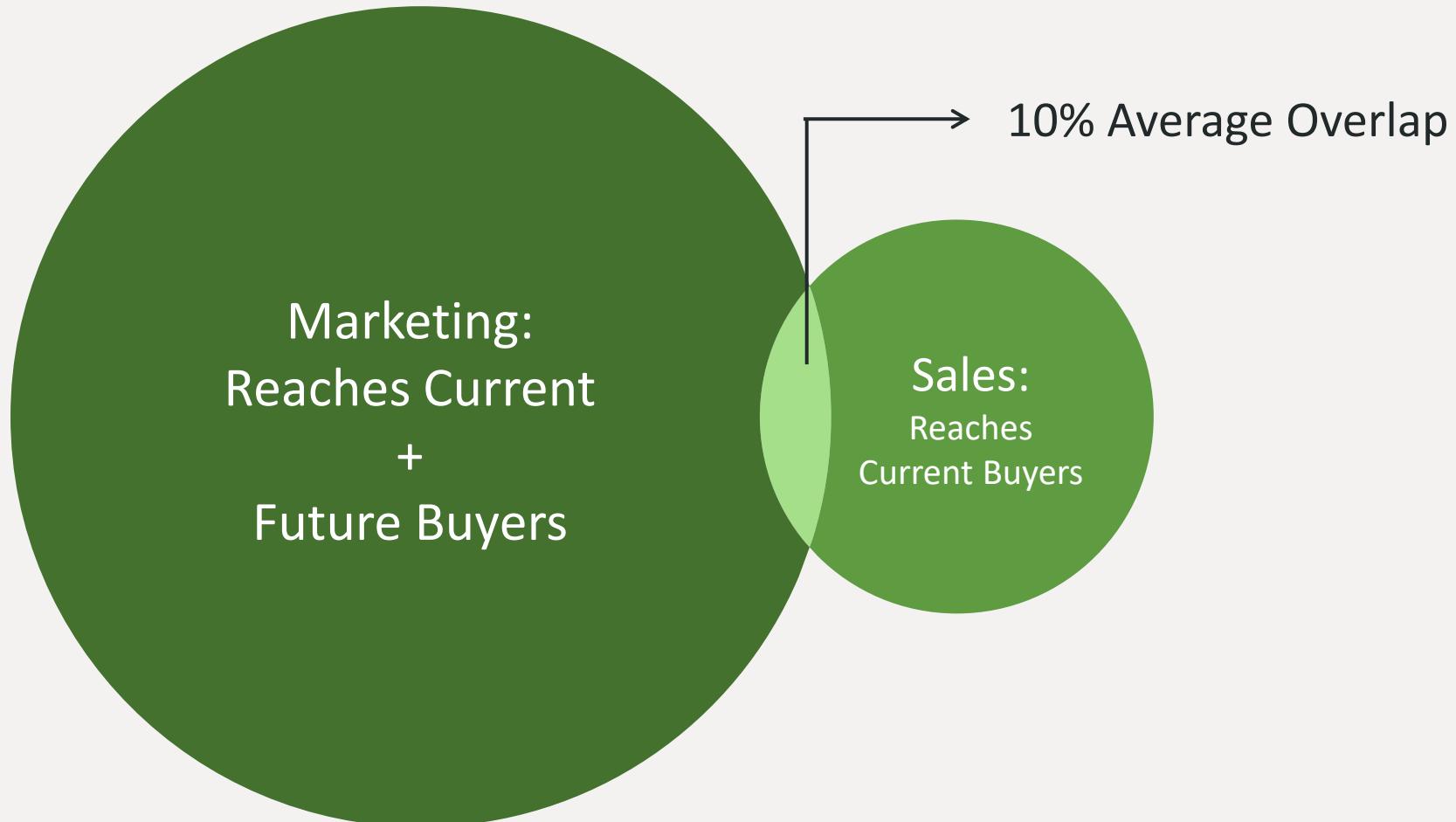
Imagine Two Circles: The Circle Of Marketing + The Circle Of Sales.



Everyone Talks About Marketing And Sales Alignment.
We're More Interested In Overlap. Overlap Should Be 100%.

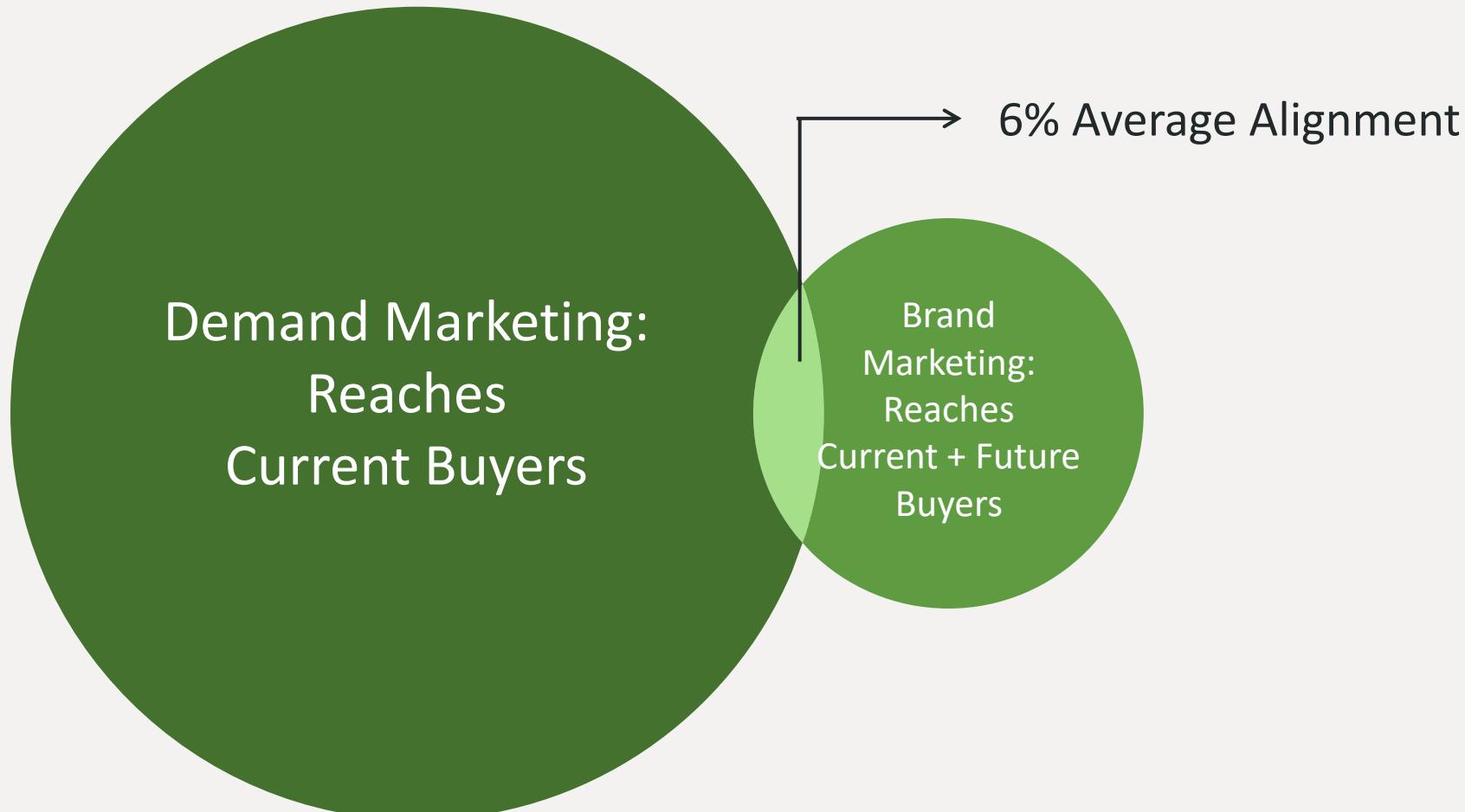


But Today, Marketing And Sales Rarely Overlap.
Each Department Talks To Different Buyers.



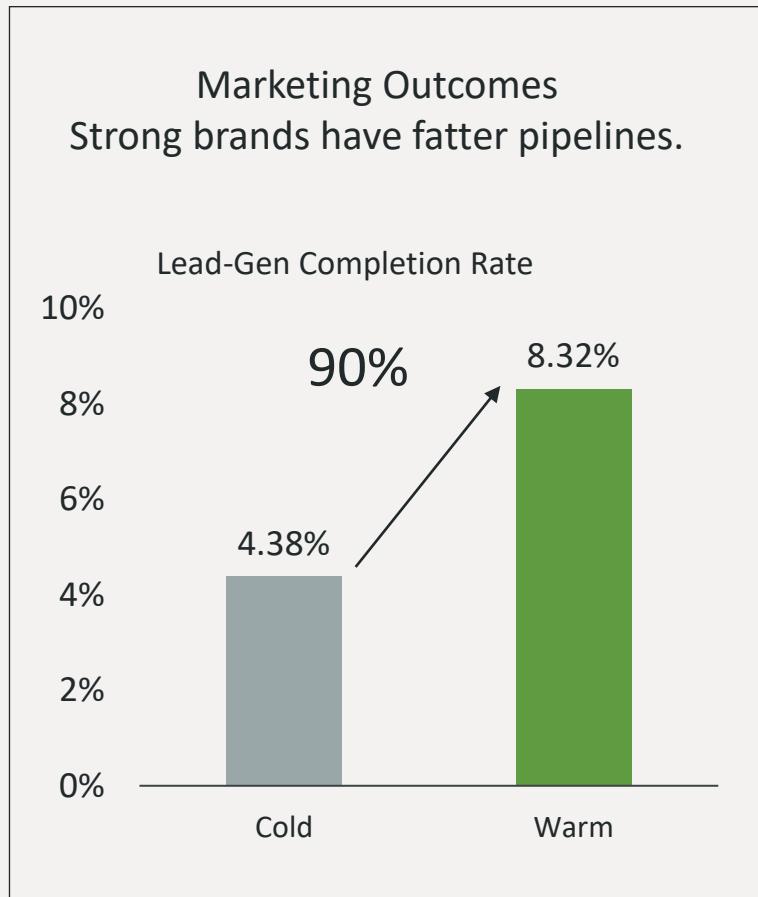
Source: LinkedIn Internal data Q2 2024 (April-June 2024) with overlap defined as marketing reach within 30 days prior to sales reach. N = 4,378 companies meeting minimum thresholds across Technology, Professional Services, Manufacturing, Financial Services, and Education. Brand defined as campaigns with objectives of brand awareness, engagement, or video views.

And Even Within Marketing Departments,
Brand And Demand Marketers Rarely Overlap.



Source: LinkedIn Internal data Q2 2024 (April-June 2024) with overlap defined as marketing reach within 30 days prior to sales reach. N = 4,378 companies meeting minimum thresholds across Technology, Professional Services, Manufacturing, Financial Services, and Education. Brand defined as campaigns with objectives of brand awareness, engagement, or video views.

Turn Your Circles Of Doom Into Circles Of Boom. Cast A Wide Net With Your Brand Ads To Drive Sales Lift.



In Summary:



Circles Of Doom

Discussion Questions

Marketing And Sales Must Have
More Than A **Shared Audience**

...

They Need A **Shared Strategy**

- What's the secret to partnering with Sales? What compromises are necessary? What does NOT work?

The Hidden Buyer Gap

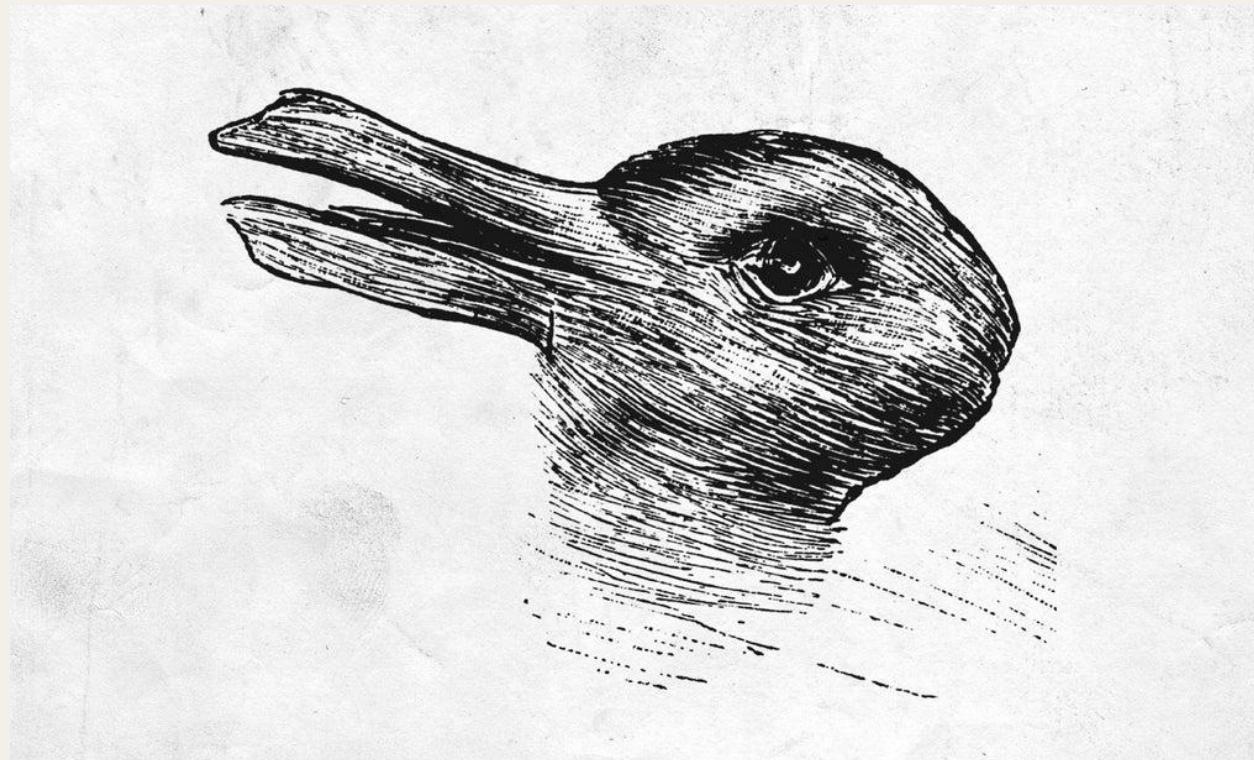
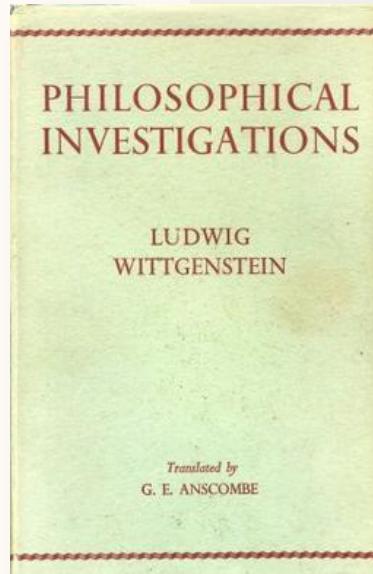




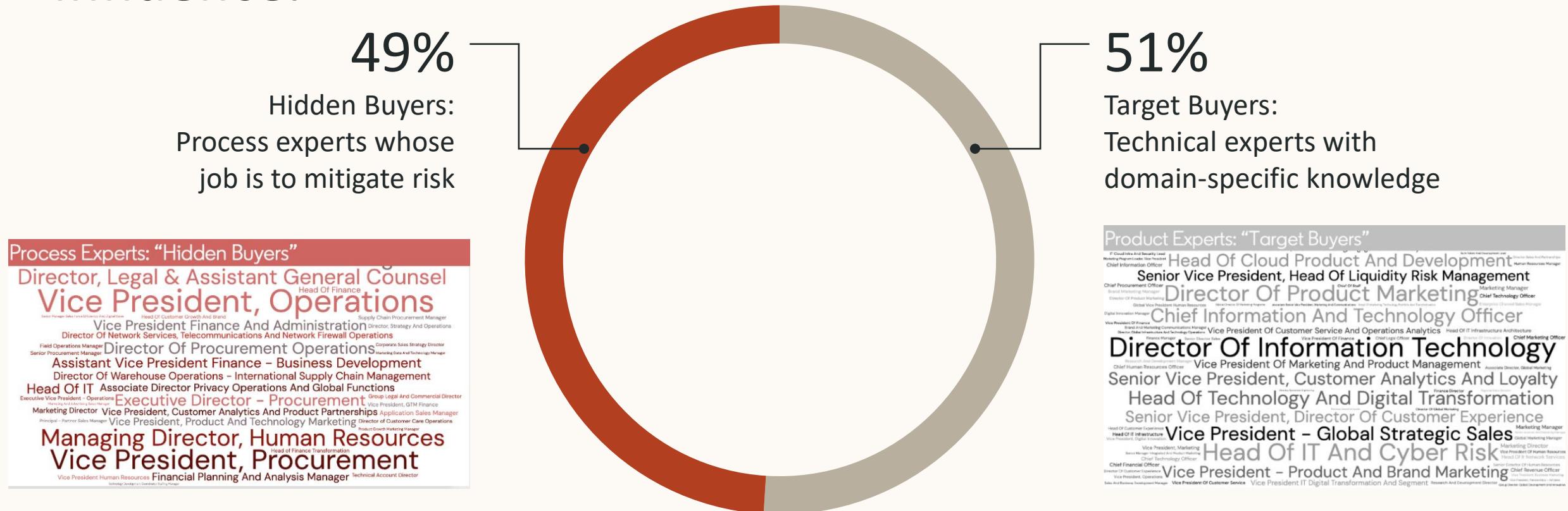
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The Hidden Buyer Gap

The Rabbit Duck Optical Illusion Illustrates How Easy It Is To Get Trapped In A Single Perception.



Most B2B Marketers Today Only See Target Buyers. But Hidden Buyers Have Half The Decision-Making Influence.



Sources: LinkedIn and Bain 2024 study, N=515 across 16 industries; distribution of purchase-decision influence between Target and Hidden buyer functions.

Around Half Of Vendors Fall Through The Gap Because Hidden And Target Buyers Have Different Purchase Criteria.

Top Drivers for Hidden Buyers

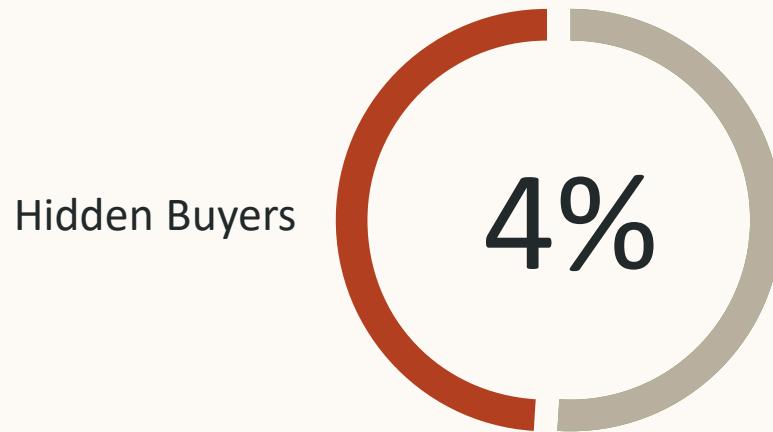


Sources: LinkedIn and Bain 2024 study, N=515 across 16 industries; distribution of purchase-decision influence between Target and Hidden buyer functions.

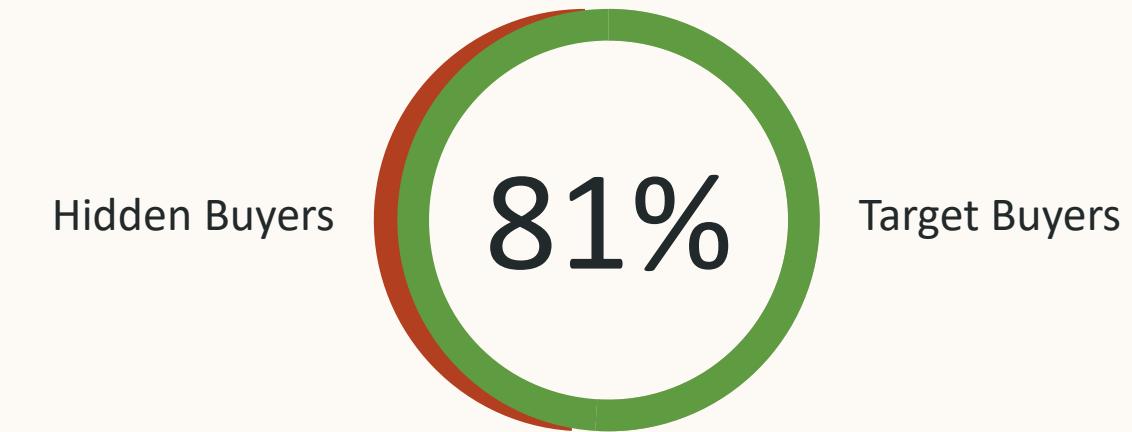
Brands That Survive The Hidden Buyer Gap Have A Noteworthy Feature:

Awareness Among Almost 100% Of The Buyer Group At The Start.

Buying Committees That Successfully Make A Purchase



“Only the recommending function knew the brand ...”



“Almost everyone knew the brand at the start.”

Sources: LinkedIn and Bain 2024 study, N=515 across 16 industries; distribution of purchase-decision influence between Target and Hidden buyer functions.

In Summary:



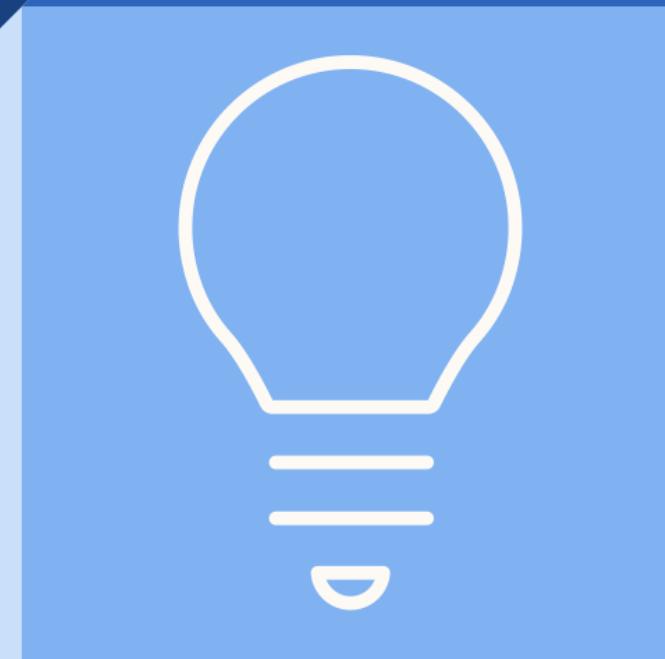
The Hidden Buyer Gap

To close the Hidden Buyer Gap, **B2B marketers need to see the full picture**

Question to Ponder

- What brand signals are you currently creating that would give hidden buyers the confidence to approve purchases?

Wrap Up



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LinkedIn page post: How the B2B growth formula works... (Illustration of three people working at a desk with a laptop and a monitor)

LinkedIn sidebar: Ad ALDI is hiring store management positions... ALDI logo, See what's in store at ALDI, Apply Now button

LinkedIn sidebar: Affiliated pages: LinkedIn Software Development Parent, Vivian(Yi) & 236 other connections work here, Following button

LinkedIn sidebar: Pages people also viewed: Ehrenberg-Bass Institute Market Research 19,028 followers, Allison (Alli) & 64 other connections follow this page, + Follow button

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Ty Heath

Director & Cofounder,
The B2B Institute

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