



MAY 2025

B2B Marketing Makes Room for Brand in Budgets and Strategies



Today's B2B marketers are under pressure to deliver measurable results. So a larger share of their budgets is currently allocated to performance marketing tactics on channels like search and social media.

But B2B marketers are shifting to a more balanced approach that emphasizes brand-building. While performance marketing satisfies short-term goals, brand marketing supports long-term growth by building trust, credibility, and lasting differentiation in crowded markets.



Shifting investment toward brand-building isn't without challenges—chief among them is proving ROI. Fortunately, better measurement, smarter tools, and evolving mindsets are opening the door for change.

This report explores findings from a survey of 110 enterprise B2B marketing executives across North America fielded by EMARKETER in partnership with StackAdapt. It uncovers how marketers are allocating budgets, what's driving their decisions, where they're investing next—and what needs to change for brand marketing to earn its rightful seat at the table.

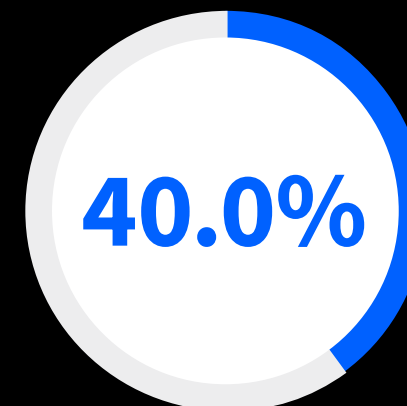
Key Findings

- 1 Brand-building is gaining traction among B2B marketers.**
Four in 10 (40.0%) plan to increase brand-building budgets in the next year. Nearly half (45.5%) would allocate more than half their marketing spend to brand-building if budget weren't a constraint—signaling growing confidence in brand's long-term value.
- 2 Lead generation continues to dominate budget priorities.**
Over half (58.2%) of B2B marketers dedicate at least half of their budgets to lead gen, with search (30.3%) and social (28.5%) as the top paid channels. Programmatic is also popular, capturing 20.6% of digital budgets.
- 3 Measurement remains the biggest barrier to brand investment.**
While 62.7% say brand is critical for long-term success, they also struggle to prove its ROI. The inability to quantify brand impact is the top obstacle, outweighing even budget limitations.
- 4 Better attribution could unlock more brand funding.**
A majority (65.5%) of marketers say access to models that link brand spend to pipeline growth would help justify larger budgets. One in three (34.5%) expect pressure to prove ROI in real time to increase in the next 12 months.

Momentum Builds for Brand Marketing

While performance marketing fuels the bottom of the funnel, brand-building fills the top—establishing awareness, trust, and preference that drive demand over time. And increasingly, B2B marketers are recognizing the need to invest in both.

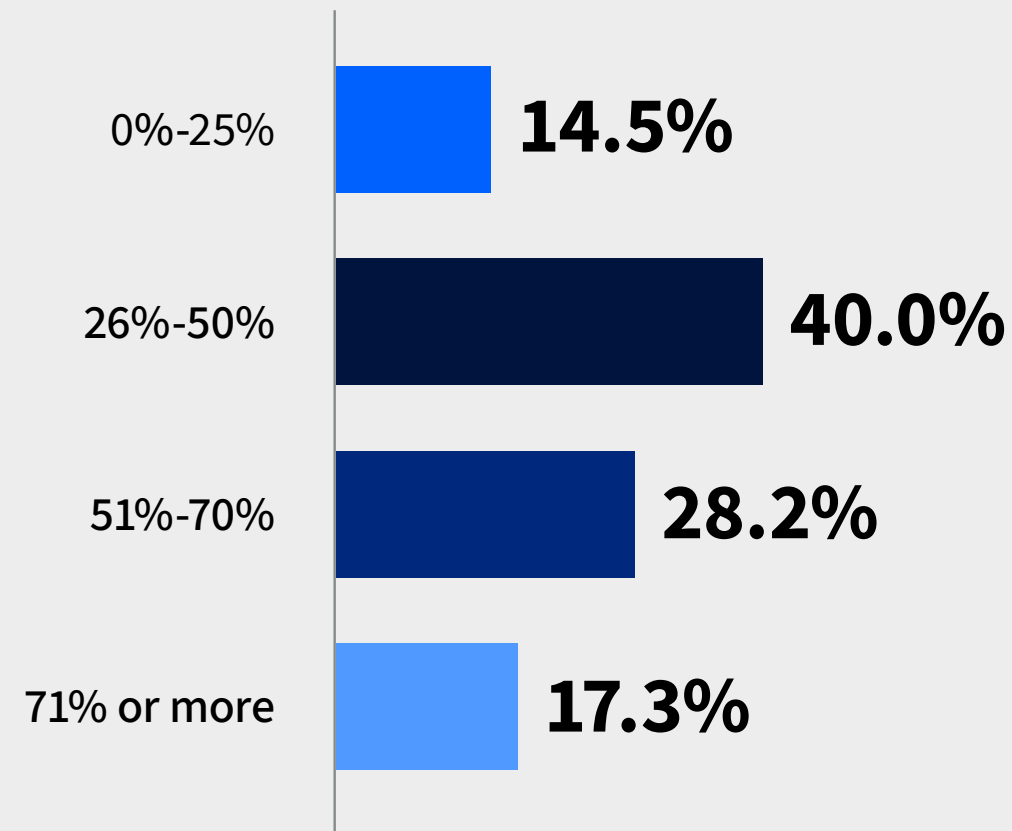
- **Four in 10 marketers (40.0%)** expect to increase their brand-building budgets in the next 12 months, according to the survey.
- **About a third (33.6%)** anticipate a modest budget increase between 1% and 19%.



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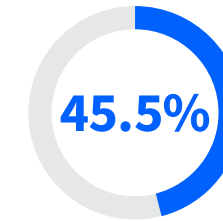
MOMENTUM BUILDS FOR BRAND MARKETING

What percentage of your budget would you ideally allocate to brand marketing if there were no constraints?

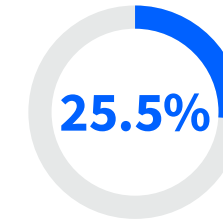


Source: EMARKETER and StackAdapt "B2B Enterprise Advertising Survey," March 2025, n=110

But the desire to invest more is clear.



of survey respondents say that if budget were no object, they'd allocate more than half their marketing spend to brand initiatives.



A quarter say that if given a 20% increase in budget, they'd put it toward brand awareness efforts within current channels to better nurture future buyers.

Ideally, brand doesn't just support the top of the funnel—it lifts performance, too, according to EMARKETER principal analyst Kelsey Voss.

- Strong brands boost click-through rates, conversion rates, and customer loyalty.
- Over time, brand marketing reduces cost-per-acquisition and increases efficiency by fueling word-of-mouth, referrals, and repeat business.




Many B2B marketers mistakenly view brand-building as too abstract or too slow to deliver real value," said Ryan Nelsen, CMO of StackAdapt. "In reality, a strong brand not only amplifies immediate performance but also significantly boosts pipeline growth, reduces acquisition costs, and accelerates sales."


Brand vs. Agency Breakdown:

Moving up the Funnel

While B2B brands zero in on performance, agencies and publishers are leaning in on upper-funnel tactics.

 **Agencies and publishers allocate more than a quarter (25.5%) of their digital media budget** to programmatic advertising, while B2B brands only allocate 15.2%, our survey found.

 **Agencies and publishers are more than two times more likely than B2B brands** to say connected TV (CTV)/video advertising is their biggest area of investment.

 When asked what the biggest shift in B2B marketing will be over the next year, **13.0% of agencies and publishers cited increased investment in CTV** and upper-funnel programmatic tactics. None of the B2B brands surveyed said the same.



CTV and upper-funnel programmatic are quietly becoming the agency world's not-so-secret weapon—and brands are missing it,” said Kenny Ginapp, head of B2B at StackAdapt. “That’s not a reason to hold back. It’s a chance to lead. As competition intensifies and the field gets noisier, being bold—showing up where others haven’t—is the real advantage. It’s how brands cut through, own the moment, and position themselves as leaders, not laggards. The question isn’t should we explore CTV and upper-funnel. It’s why wouldn’t we—especially when the whitespace is this wide.”



Lead Generation Is Still a B2B Cornerstone

Lead generation directly supports pipeline growth and revenue. That's why 58.2% of B2B marketers say at least half of their marketing budgets are dedicated to lead generation.

"Performance marketing is essential in B2B for generating quality leads and delivering measurable outcomes," said Voss.



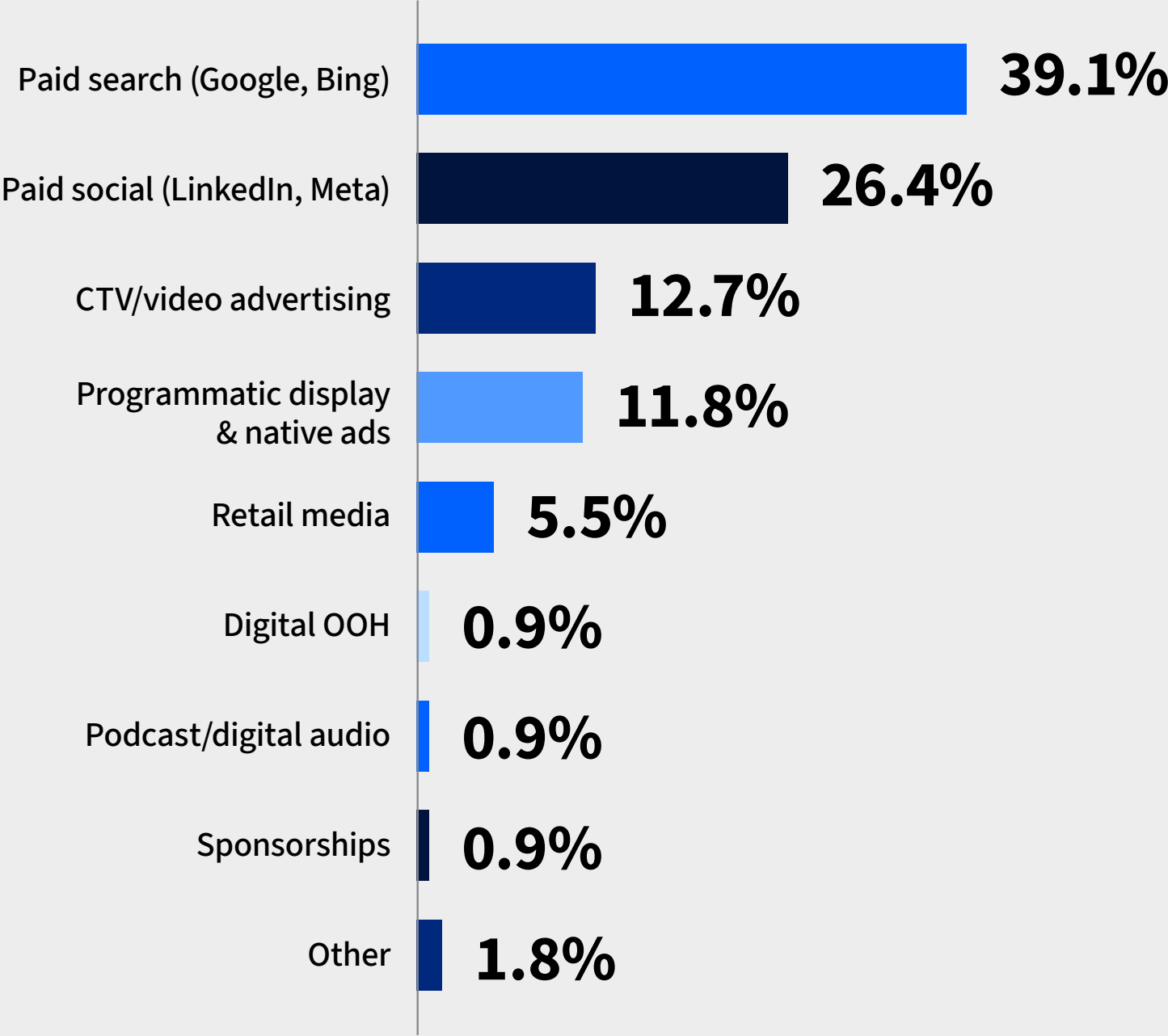
Events play an important role, but digital channels like search, social, and programmatic are key to reaching the right buyers, in the right places, with the right message—at scale."

Kelsey Voss

Principal Analyst, EMARKETER

LEAD GENERATION IS STILL A B2B CORNERSTONE

What’s the biggest area of digital investment for your team right now?



Source: EMARKETER and StackAdapt “B2B Enterprise Advertising Survey,” March 2025, n=110

While in-person trade shows and events are the top sources of lead generation among US B2B marketers, per November 2024 data from Sagefrog Marketing Group, marketers are doubling down on digital channels to cast a wider net.

- **Paid search and paid social are the biggest areas of digital investment**, according to survey respondents.
 - **Marketers currently dedicate 30.3% of their budgets to search** (paid and organic) and 28.5% to social (paid and organic), according to the survey.
 - **Nearly 21% of digital media budgets are going toward programmatic advertising** due to its ability to precisely target B2B buyers at scale.
- Performance considerations also play a key role in how marketers manage their budgets.
- **Past performance is the most important factor** in allocating their budget across channels, according to 77.3% of B2B marketers.
 - **Success is determined by KPIs like cost per lead (CPL)**, direct traffic growth from brand campaigns, and pipeline influence and revenue attribution.

BRAND VS. AGENCY BREAKDOWN:

Balancing the Budget

Unsurprisingly, B2B brands invest more heavily in performance-based channels than agencies or publishers.



B2B brands are twice as likely as ad agencies and publishers to use a 20% increase in marketing budget to double down on lead generation for faster pipeline growth.

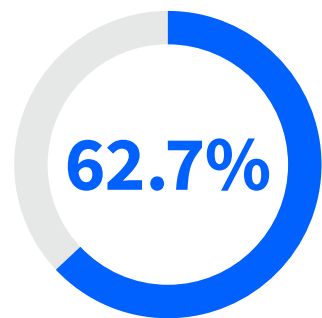


B2B brands dedicate more of their budget to search than agencies and publishers do and are more likely to say paid search is their biggest digital investment.



Brand Marketing's Weakness: Measurement and Attribution

Despite growing interest in brand investment, measurement remains a major hurdle.



Nearly two-thirds of marketers agree that brand is a critical long-term play—but struggle to quantify its impact, according to survey results.

- **Proving ROI is the No. 1 barrier to increasing brand investment**, cited by nearly twice as many marketers as the next biggest challenge: limited budget flexibility.



The biggest hurdle marketers face isn't recognizing the value of brand investment—it's proving it in a language the business understands.”

Kenny Ginapp

Head of B2B, StackAdapt

BRAND MARKETING'S WEAKNESS: MEASUREMENT AND ATTRIBUTION

What is the biggest challenge preventing you from increasing investment in brand marketing?



Source: EMARKETER and StackAdapt "B2B Enterprise Advertising Survey,"
March 2025, n=110



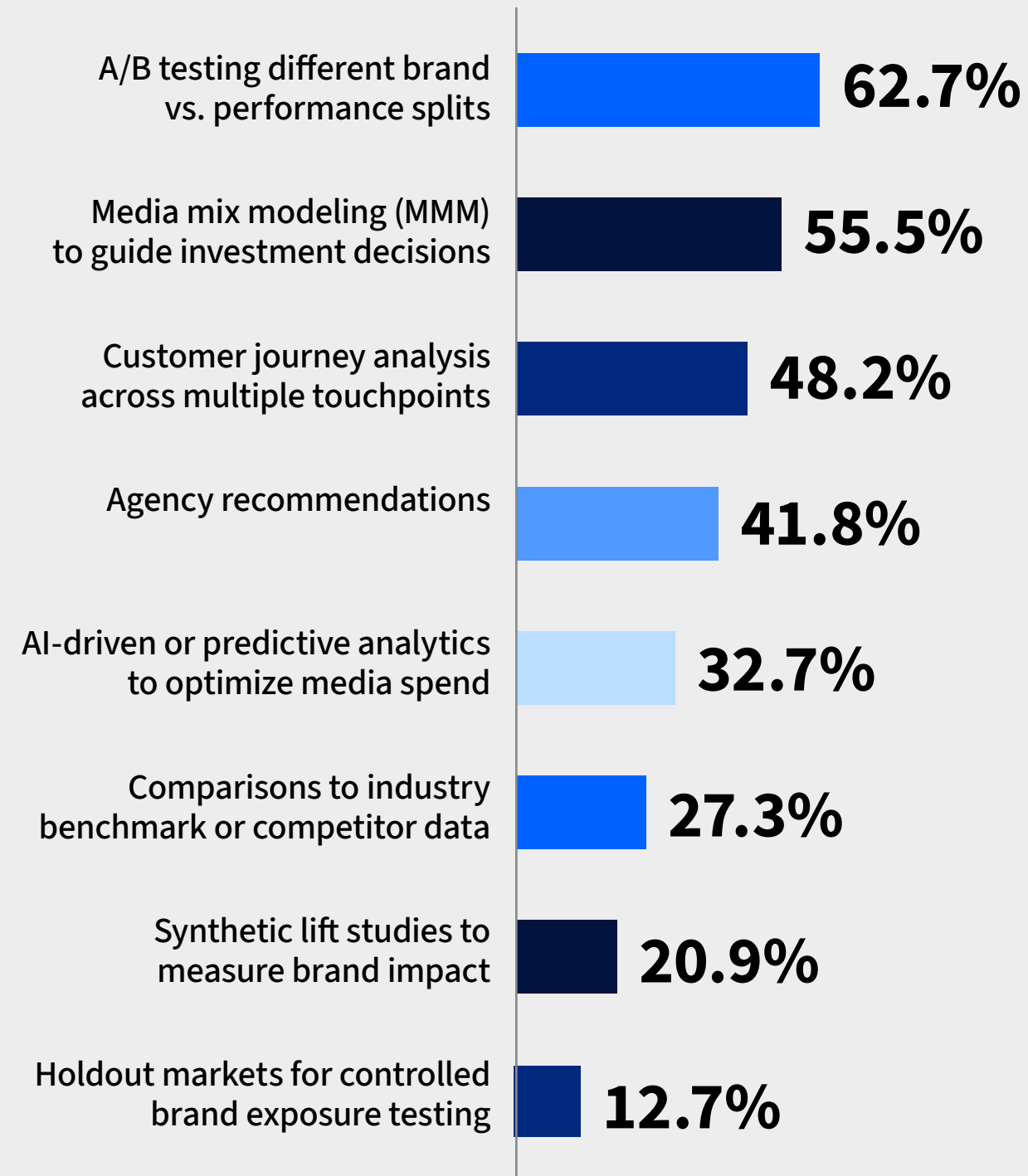
Without clear links between brand activity and revenue impact, it's hard to win the budget needed to build brands that actually drive growth. Skip that step, and you're essentially weakening the foundation needed for your performance marketing to succeed," said Ginapp.

To refine their media mix, many marketers rely on A/B testing different brand versus performance budget splits. Others use marketing mix modeling (MMM) and customer journey analysis to assess the broader impact of brand efforts.

- **56% of US ad buyers plan to focus on MMM** at least somewhat more in 2025, according to the Interactive Advertising Bureau (IAB).
- **30.1% of US marketers believe MMM is best at identifying drivers of business value** or outcomes, according to July 2024 data from EMARKETER and Snap Inc.

BRAND MARKETING'S WEAKNESS: MEASUREMENT AND ATTRIBUTION

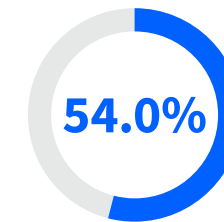
Which strategies are you using to refine your media mix?



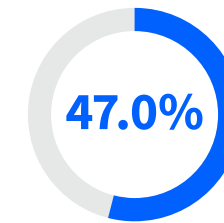
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AI and automation are also becoming part of the solution, with about a third (32.7%) of marketers expecting a heavier reliance on these tools to optimize media allocation in the next year.



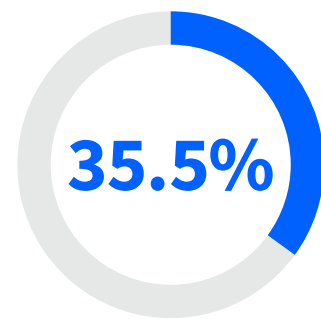
Over half of US B2B marketers are currently using AI for performance tracking while 30% plan to use it in the future, according to September 2024 data from Ascend2 and TopRank Marketing.



are using AI for campaign optimization, with 36% planning to use it in the future, that study found.

Solving Attribution Will Unlock Bigger Brand Budgets

Looking ahead, the pressure to prove ROI will only intensify.



Over a third of marketers say they expect to face greater demand to demonstrate returns in real time over the next 12 months, according to our survey.

- In addition, B2B marketers are struggling with tighter buyer budgets and increasing competition, according to November 2024 data from Sopro.



The most promising path forward is better measurement and attribution.

- **A majority of marketers (65.5%)** say access to attribution models that clearly connect brand spend to pipeline growth would be the most effective way to justify increased brand investment.
- **61% of US ad buyers plan to focus** at least somewhat more on attribution modeling in 2024, according to IAB data.

“AI is helping B2B marketers connect brand efforts to business outcomes,” said Voss.



Brand ROI can't stop at awareness and impressions—it needs to tie to metrics like win rate, deal size, and time to close. As pressure grows to prove value in real time, AI-powered attribution models will be essential for showing brand's impact across the full funnel.”

Kelsey Voss

Principal Analyst, EMARKETER

BRAND VS. AGENCY BREAKDOWN:

Measuring Up



Measurement strategies vary, with B2B brands leveraging tried-and-true methods like A/B testing while agencies and publishers are adopting more advanced solutions including MMM and multitouch attribution (MTA).

- To determine how to split their budget between channels, agencies and publishers rely more heavily on past performance or whether the channels met campaign goals, while B2B brands focus more on experimentation and A/B testing.
- B2B brands are also more likely to use A/B testing to refine their media mix, while agencies and publishers use MMM, industry benchmark or competitor data, and synthetic lift studies.
- Agencies and publishers are more likely to use MTA models, video completion rate/engagement metrics, and branded lift from search to measure the success of digital media investments.

5 Tips for Balancing Performance and Brand Marketing

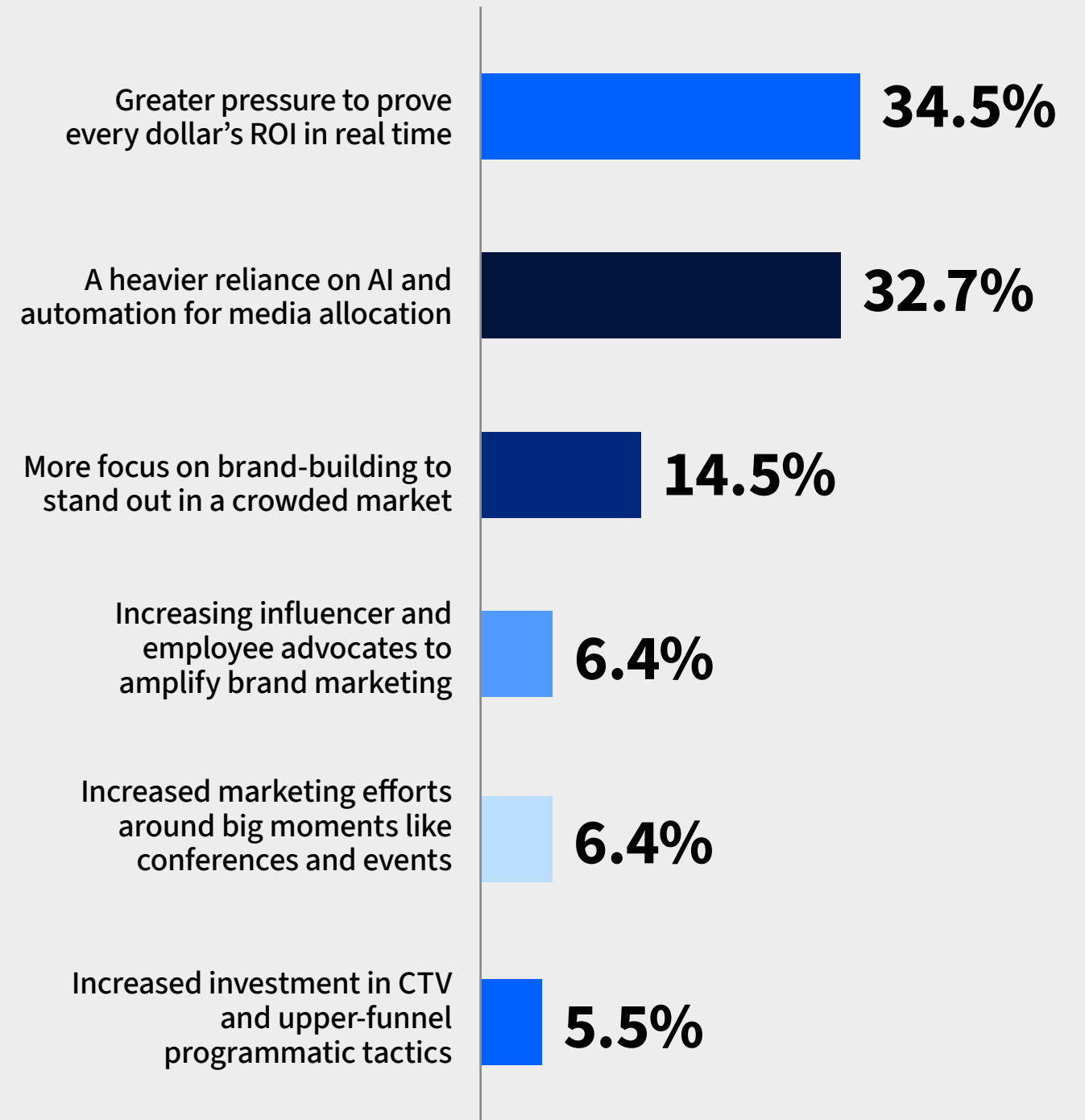


B2B marketers who get brand marketing right aren't overhauling their strategy—they're adjusting their approach. They're applying the same tools and channels but with a longer-term lens on growth and impact."

Kelsey Voss

Principal Analyst, EMARKETER

What's the biggest shift you predict for B2B marketing in the next year?



Source: EMARKETER and StackAdapt "B2B Enterprise Advertising Survey," March 2025, n=110

Here are five strategies to balance short-term wins with long-term growth.

**TIP 1**

Position brand as a performance driver

Investing in brand-building fuels stronger performance and long-term growth.

- A strong brand improves conversion rates, reduces customer acquisition costs, and builds greater customer loyalty.
- When brand and performance efforts are integrated, marketers can maximize the impact of every dollar spent across the funnel.



Brand isn't the opposite of performance—it boosts it. With more buyers doing their own research, a bold, distinctive brand builds trust early and helps B2B firms stand out from the competition. Without it, even the best lead gen efforts struggle to break through the noise.

Kelsey Voss

Principal Analyst, EMARKETER



TIP 2

Invest in measurement that connects brand to business outcomes

Measurement is the top barrier to greater brand investment.

- Marketers should explore tools like MMM, customer journey analysis, and AI-powered attribution.
- These approaches quantify the brand's impact on revenue, pipeline influence, and lead quality—strengthening the case for continued investment.



TIP 3

Use testing to guide budget reallocation

Marketers don't need to overhaul their strategy overnight.

- A/B testing different performance versus brand budget allocations can yield insights into the best mix for results.
- Even modest increases in brand investment can show measurable gains in awareness, trust, and future demand.



It's important to lean on consistent measurement and go [invest] where the data leads you. No singular measurement solution is a source of truth. Putting brand-focused campaigns and performance-based campaigns in the market and leaning on a trusted measurement philosophy unlocks an equal playing field for assessing the ROI of brand and performance campaigns.”

Nick Figueiredo

Head of Performance Marketing,
MilliporeSigma - the Life Science business
of Merck KGaA, Darmstadt, Germany



TIP 4

Build the business case for future demand

While performance marketing captures existing demand, brand-building creates it.

- By illustrating how brand efforts nurture future buyers and accelerate the buyer journey, marketers can align with sales goals and revenue growth—especially in longer B2B sales cycles where relationships and trust are essential.



TIP 5

Advocate for flexible budgeting and long-term thinking

Many B2B marketers say they would invest more in brand if budget constraints weren't a factor.

- It's time to reframe how budgets are built—favoring flexibility and long-term strategy over strict quarter-by-quarter optimization.
- Carving out dedicated funds for brand initiatives—especially within proven digital channels—can be a powerful first step.



B2B advertisers lag B2C in adoption of brand advertising as a pillar in their marketing programs. The strongest brands, or the challenger brands who wish to be No. 1, will be fast to adapt their marketing budgets to incorporate brand advertising and their marketing org structure to be inclusive of brand and performance marketing in one team and one budget.”

Nick Figueiredo

Head of Performance Marketing,
MilliporeSigma - the Life Science business
of Merck KGaA, Darmstadt, Germany

About the survey

This survey of 18 questions was developed and fielded by EMARKETER in collaboration with StackAdapt.

We surveyed 110 B2B enterprise executive marketing professionals in North America about how they split their advertising budgets between performance and brand marketing, including current channel allocations, how they refine their media mix, and barriers to additional brand investment.

About this report

Research for this report was compiled by members of the EMARKETER Studio team in partnership with StackAdapt, using reports, data, and research by EMARKETER on B2B marketing, ad spend, and strategy.

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