The 2025 Martech & AI Playbook for CMOs

couch & associates

May 2025

Executive Summary

Marketing leaders in 2025 face a convergence of economic uncertainty and rapid technological change. This whitepaper provides an analyst perspective on how Chief Marketing Officers (CMOs) at large North American B2B companies can navigate these challenges. Key insights include:

- **Navigating a Shifting Economy:** The post-pandemic economy in early 2025 is slowing – with high interest rates, cautious consumer spending, and a 40% chance of recession in the next year[1], CMOs must justify spend with clear ROI as **CFOs tighten budgets in a low-growth climate**. However, history shows companies that sustain strategic marketing during downturns often emerge stronger.[18]

- **Martech & AI Trends for 2025**: **Generative AI has moved from novelty to necessity**, powering faster content creation and 10–25% higher returns on ad spend in early trials[4]. **Predictive analytics** are now considered essential by 74% of CMOs for data-driven strategy[6]. **Customer Data Platforms (CDPs)** have gone mainstream – crossing a $7B+ market in digital transformation[7] – as businesses unify first-party data to personalize experiences. **Marketing automation** continues to evolve with AI, enabling real-time personalization and efficient omnichannel campaigns.

- **Lessons from Past Downturns:** In the **early 2000s dot-com bust**, many firms cut back on nascent digital initiatives, yet the internet's transformative impact only accelerated thereafter.[10] During the **2008 recession**, brands that shifted to measurable digital marketing (e.g. search ads grew ~15% in 2009 despite the meltdown) gained an edge.[3] The **COVID-19 crisis (2020-21)** massively accelerated digital adoption – effectively vaulting businesses **5–7 years ahead** in digital transformation[13]. Even the **Great Depression** offers a lesson: Kellogg's doubled down on advertising (radio) while rivals cut back, boosting profits ~30% and becoming the market leader by 1933.[11] The pattern is clear – strategic marketing and innovation during tough times drive long-term advantage.

- **B2B Customer Behavior in 2025:** B2B buyers have permanently shifted to a **digital-first, omnichannel** approach. Roughly one-third of interactions are now in person, one-third remote, and one-third self-serve digital – a "rule of thirds" that emerged during the pandemic and persists into 2025.[12] Customers demand seamless experiences across these channels and highly personalized, relevant content. **20% of B2B decision-makers ("Innovators") even use generative AI** tools to research suppliers[19], raising the bar for marketers. At the same time, buyers expect transparency and trust in how their data and AI are used.

- **Strategic Recommendations:** To future-proof marketing, CMOs should **align investments to efficiency and resilience**. Prioritize first-party data and CDPs to fuel personalization at scale; leverage AI (generative and predictive) to boost productivity and customer insight but **invest in upskilling teams and integrating AI thoughtfully** (as 56% of executives say implementing generative AI strains current workflows).[8] Embrace agile marketing – test, learn, and iterate quickly – rather than big bets, and focus on customer value. In an uncertain economy, doubling down on **customer experience and loyalty** pays off more than splashy ad campaigns.[9] Use data to guide budget decisions and make the case to the C-suite that marketing is an investment in growth, not just a cost center.

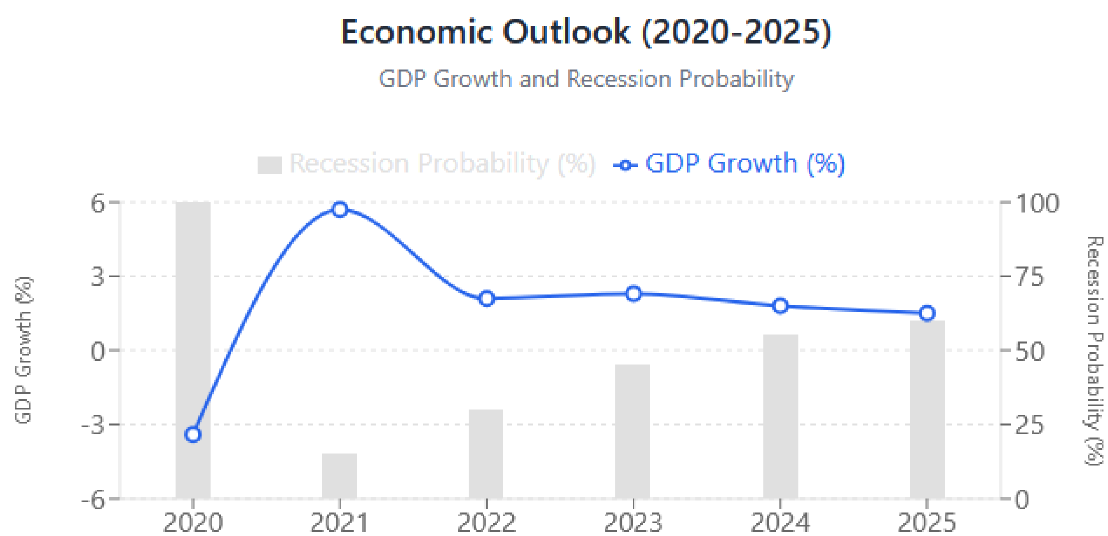
This playbook is structured as an executive guide with data-backed analysis and real-world examples. Each section dives deeper into the above points, with clear headings and references to support key claims. By understanding the economic context, harnessing emerging technologies, learning from past crises, and staying laser-focused on evolving B2B customer expectations,[4] CMOs can confidently steer their teams through 2025 and beyond.

We hope you find our analysis thought-provoking and useful, thank you.

Mike Couch
CEO / Managing Partner

Macroeconomic Outlook 2025: Implications for Marketing

As of April 2025, CMOs must contend with a mixed macroeconomic environment. The exuberant post-COVID rebound has cooled, and most forecasts point to **slower growth ahead with continued uncertainties**. In the United States, GDP growth for 2025 is now projected at a modest ~1.7%, a downgrade amid signs that the economy is *"losing steam"*.[2] High interest rates – after aggressive central bank hikes to tame 2022–23 inflation – persist, raising the cost of capital and prompting CFOs to scrutinize expenditures.[8] Consumer and business sentiment have turned cautious: one March 2025 analysis notes *"private sector surveys turning negative… consumer sentiment has plunged"*, and policy uncertainty (e.g. tariff tensions) remains elevated. Indeed, there is



Note: 2024-2025 values are projections based on economic indicators as of April 2025

Data sources: Bureau of Economic Analysis (GDP data 2020-2023), Federal Reserve Economic Forecasts (2024-2025 projections), National Bureau of Economic Research (recession data) roughly a **40% chance of a recession in the next 12 months** by some estimates,[2] though any downturn is expected to be mild if it occurs.

For marketing leaders, these macro conditions signal tighter budgets and the need for prudence. When growth is uncertain, boards and finance chiefs often view marketing spend as expendable or at least something to be justified rigorously. CMOs should be prepared to demonstrate ROI on every campaign and to prioritize channels that drive efficient, measurable results. Broadly, we expect **continued price sensitivity among customers in 2025**, given that consumers and businesses alike are facing higher costs of debt and are cautious[5] with spending. **Demand is not expected to surge**; rather, global consumer demand will grow at a similar subdued pace as 2024.[1] In practical terms, that means marketers may battle longer sales cycles in B2B, more scrutiny on big purchases, and an increased emphasis on value propositions.

On the positive side, fundamentals entering 2025 are not entirely grim. Corporate balance sheets and consumer finances had been relatively healthy post-pandemic, providing some cushion. Certain sectors are showing resilience – for example, manufacturing is expected to **begin a fragile recovery in 2025**,[20] with industrial indices indicating a tentative upturn from the bottom of the cycle. **Regional divergences** will be notable: some economies (e.g. parts of Europe tied to tourism, and major Asian markets like India and Indonesia) are poised to do better, whereas others may lag. For North American B2B firms, a strong U.S. dollar in 2025[21] could pressure export competitiveness but also lower import costs, affecting pricing strategies.[6]

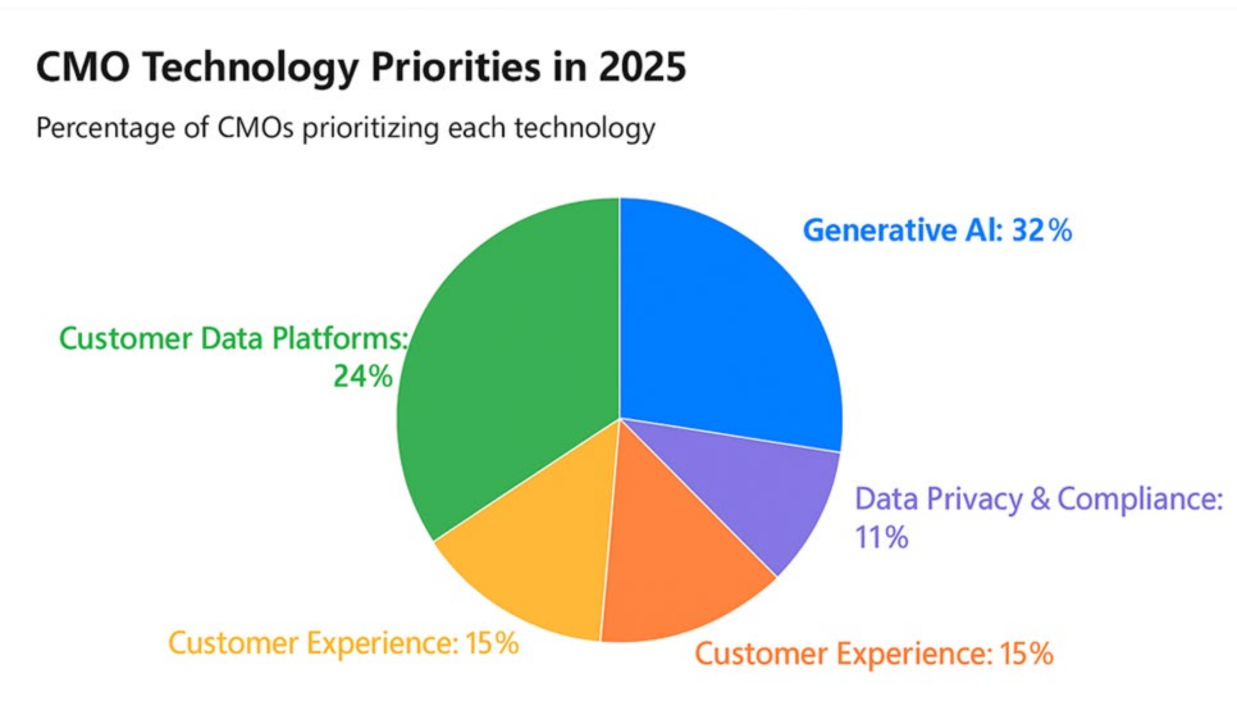
Marketing Strategy Implications: In this environment, CMOs should **stress-test their marketing plans against economic scenarios**. A prudent approach is to prioritize efforts that can drive short-term wins (to satisfy ROI demands) *while still investing in brand and customer experience for the long term*. Lessons from past recessions underscore this balance. Cutting marketing too deeply can hollow out brand equity and leave firms poorly positioned when growth returns. In fact, historical data from the Great

Recession of 2008–09 shows that brands maintaining ad spend or reallocating to high-efficiency digital channels emerged with stronger share of voice. During 2009 – the trough of the recession – **search marketing spend actually grew ~15%**[3] as advertisers shifted to more accountable media. The takeaway is that **reallocating budget to proven, data-driven channels (search, programmatic, email, etc.) can deliver “secure and effective” results in a downturn **, whereas blanket cuts to marketing may be counterproductive.

Additionally, CMOs should work closely with Finance to define metrics that matter in this climate (e.g. customer acquisition cost, pipeline velocity, customer lifetime value) and report on them transparently. **Agility in spend** is crucial – for example, having the ability to pause or scale campaigns quarter-by-quarter as market conditions evolve. Given the 2025 outlook, it’s wise to **build contingency plans** (if a mild recession hits, which programs get trimmed versus protected?). Overall, the macro context calls for **disciplined, ROI-focused marketing** – but not a retreat from marketing. Especially in B2B, buyers will continue to engage with informative content and trusted brands; those companies that stay present and helpful to customers[18,5] in tough times can “roar out” of the recession ahead of less visible competitors.

Evolving Martech & AI Trends Shaping Marketing in 2025

Even as economic pressures demand efficiency, technological innovation is unlocking new ways to achieve that efficiency. The marketing technology (Martech) landscape in 2025 is dominated by tools and platforms infused with artificial intelligence – enabling smarter decisions and more personalized customer engagement at scale. CMOs should pay particular attention to four key trends: **generative AI**, **predictive analytics**, **customer data platforms**, and **marketing automation**. Below, we explore how each is evolving and what it means for marketing strategy.

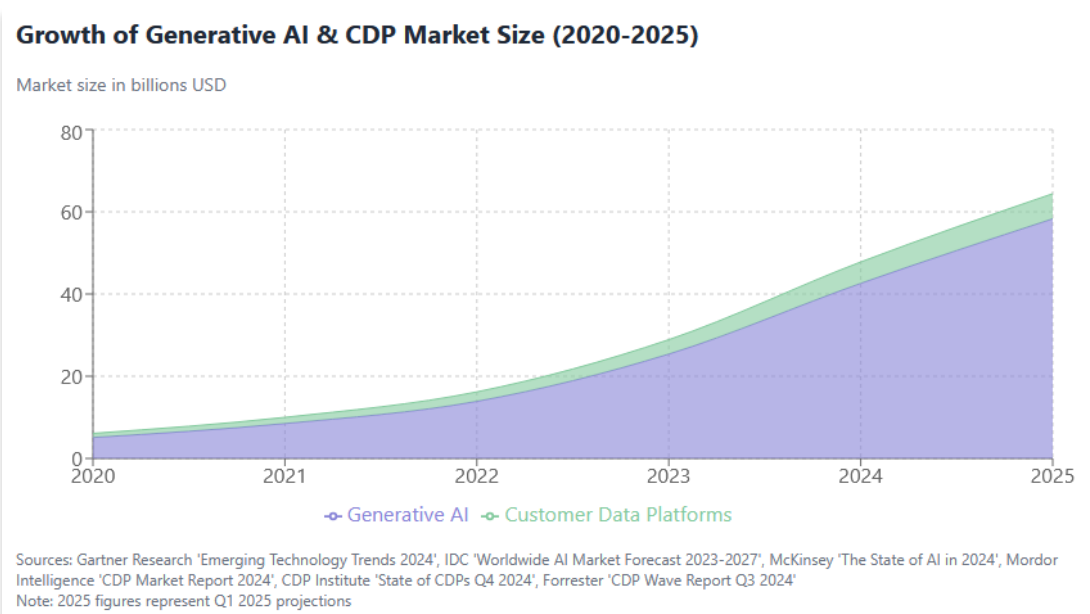


Sources: Gartner 'CMO Spend Survey 2024', Deloitte 'CMO Survey Q3 2024', Forbes 'State of Marketing Technology 2024'

Generative AI Goes Mainstream in Marketing

In the span of two years, generative AI has evolved from a novelty to an integral part of marketing workflows. Early adopters have experimented with AI models (like GPT-4 and similar) to generate content, design creative variations, and even converse with customers via chatbots. Now, in 2025, leading firms are moving **beyond pilots to scale up** their generative AI initiatives – and reaping tangible benefits. According to Bain & Company, marketers using generative AI for campaign creation and personalization have begun seeing **significant uplifts in performance – with some retail marketing teams reporting 10–25% higher returns on ad spend from AI-powered campaigns**.[4] These gains come from AI's ability to rapidly produce and test content variations, target micro-segments with tailored messaging, and optimize spend in real time.

Generative AI is also accelerating content production dramatically. Marketers can task AI to draft blog posts, social media copy, product descriptions, or even video scripts[7] in seconds – output that would have taken humans days to create. Senior executives



recognize this potential; in one recent digital trends survey, **86% of executives expected generative AI to significantly increase the speed and volume of content creation**.[8] This means CMOs can feed the ever-growing demand for content across channels – but it also raises challenges. Notably, 56% of marketing and customer experience (CX) teams report that **implementing generative AI has added strain to their workflows**.[8] Integrating AI-generated content into approval processes, ensuring brand voice consistency, and preventing factual errors or bias all require new governance. Thus, while generative AI offers a powerful productivity boost, CMOs must invest in **training staff and updating processes** to fully leverage it. The payoff for those who do so is not just efficiency but also creativity – teams free from routine content tasks can focus on higher-level strategy and innovation.

Another emerging aspect in 2025 is the rise of AI "co-pilots" or agents in marketing. These AI agents can autonomously execute certain tasks or make recommendations. Deloitte predicts that by 2025, **25% of enterprises using generative AI will deploy AI agents to enhance workflows and decision-making**.[5] Imagine an AI agent that can autonomously segment audiences, send hyper-personalized emails, or adjust bids based on performance thresholds – all while learning from results. For CMOs, the message is that **AI is shifting from an experimental tool to a strategic co-worker**. The most successful marketing organizations will treat generative AI as a core capability – embedding it in content supply chains, campaign optimization, and customer interactions. Those that lag may find themselves outpaced by competitors producing content and campaigns at a speed[8] and relevance no human-only team can match.

Predictive Analytics and Data-Driven Insights

Alongside content creation, AI's other superpower for marketers is making sense of data. **Predictive analytics** – using machine learning to forecast customer behavior and outcomes – has become a cornerstone of modern marketing strategy. What's changed in 2025 is the accessibility and expectation of these capabilities. A recent Gartner study found **74% of CMOs believe AI-powered predictive analytics will be essential for their marketing strategy in the next three years**.[6] In other words, using AI to anticipate customer needs is no longer optional; it's a competitive necessity.

74% of CMOs believe AI-powered predictive analytics will be essential for their marketing strategy in the next three years

Predictive models are being applied across the marketing funnel. In B2B, sales and marketing teams use lead scoring algorithms to predict which prospects are most likely to convert, focusing human effort where it matters most. Account-based marketing programs predict which target accounts are showing intent signals so campaigns can be personalized and timed for when the buyer is ready. On the customer retention side, predictive analytics identify at-risk customers (by analyzing product usage patterns or engagement drops) so that account teams can intervene before churn occurs. **Advanced marketers are even predicting the content or offers that will most interest each customer**[8] – for example, recommending the next-best product or content asset based on similarity to past successful engagements.

The evolution in this space is that these predictive insights are increasingly real-time and automated. Thanks to integration of AI with customer data platforms and marketing automation (discussed below), the moment a notable behavior occurs – say a surge of website visits from a certain account, or a customer reaching their one-year renewal date – an AI model can score the likelihood of a desired outcome and trigger an appropriate action. This might be automatically sending a tailored offer, or alerting a sales rep with recommended talking points. The **immediacy** is key: by 2025, marketers aim to not only predict "what" and "who" but to act on those predictions in the moment. As one industry analysis noted, *"AI can anticipate user needs and respond by tailoring* *content and experiences as they arise*",[15] enabling **hyper-personalized, real-time customer journeys**.

For CMOs, capitalizing on predictive analytics requires a solid data foundation and experimentation mindset. They must ensure their teams have access to unified, quality customer data (again pointing to the role of CDPs), and the right analytics tools or data science support. It's also about asking the right questions – e.g., what are the early indicators of a high-value lead for us, or which combination of signals best predicts churn? In implementing predictive models, transparency is important too. Both internal stakeholders and customers may want to understand (at least at a high level) why the AI is making certain recommendations. Explainable AI outputs and clear governance policies (especially to avoid inadvertent bias) will help build trust in predictive analytics. When done right, predictive insight can significantly **optimize marketing spend** (by focusing it where conversion odds are highest) and improve customer satisfaction[12] (by meeting needs proactively). It shifts marketing from reactive to proactive – a critical capability in fast-moving markets.

Customer Data Platforms and the Power of First-Party Data

In 2025, **data is the backbone** of virtually every marketing initiative – and Customer Data Platforms have emerged as the central hub for that data. A **Customer Data Platform** (CDP) is a system that aggregates and organizes customer data from all sources (CRM, website, emails, events, third-party, etc.) to create a unified, 360-degree customer profile. Over the past few years, the phasing out of third-party cookies and increased privacy regulations have made first-party data (the data companies collect directly from their audiences) ever more valuable. As a result, investment in CDPs has surged. The global CDP market size in 2024 reached **$7.8 billion**, and it is projected to continue skyrocketing (some estimates put it over $28B by 2028). This growth reflects how **critical unified customer data has become for modern marketing strategies**.

Top-performing companies are using CDPs to deliver the holy grail of marketing: **personalization at scale**. With a CDP, a CMO can finally answer questions like: Who is this customer across all our touchpoints? What content have they engaged with? Where are they in their buying journey? The ability to pull in behavioral data (website clicks, product usage), transactional data (purchase history), and demographic data into one profile means marketing campaigns can be far more targeted and relevant. For example, you can automatically trigger a sequence of messages[15] tailored to someone's specific product interest and recent actions (say, downloading a whitepaper on a topic, then attending a webinar) because the CDP feeds that insight into your marketing automation. Executives see this as key to **"delivering personalized experiences at lightning speed"**, which is why so many are deploying CDPs at the heart of their stack.

The evolution in CDPs by 2025 is also about **real-time capabilities and AI integration**. Modern CDPs are not just static databases; they increasingly have built-in machine learning to help segment customers[9] or even predict the next best action (blurring into the predictive analytics territory). They also are moving toward real-time data flows, so that if a customer does something (like visits a pricing page or opens an email), the CDP updates their profile instantly and can trigger an immediate response. This addresses a common gap identified in personalization efforts: many organizations have been unable to personalize in real time due to fragmented data. By linking CDPs with decision engines and delivery channels, marketers can respond to customer behavior on the fly. For instance, a B2B software company's CDP might notice a key account's employee just downloaded a trial; it could instantly alert the account manager and also add that person to a high-touch nurture track.

For CMOs, investing in a CDP (or ensuring your marketing cloud's data capabilities serve the same function) is increasingly seen as table stakes. However, they should be mindful of **data governance and privacy**. Customers are willing to share data for personalization, but only if handled responsibly. A striking 88% of consumers expect assurance that their personal data is used securely, yet less than half of organizations meet that expectation today.[10] Marketing leaders must therefore champion stringent data governance – ensuring compliance with laws (GDPR, CCPA, etc.), transparency in data usage (clear preferences centers and opt-outs), and robust security. When a CDP is implemented well, with proper consent and value exchange, it enables the kind of individualized marketing that drives revenue and deepens relationships. As one case in the Adobe Digital Trends report showed, **AI-driven personalization powered by unified data delivered an 11% sales lift** for a telecom provider.[8,10] The message: the combination of first-party data + AI + activation channels can yield immediate ROI, which is exactly what is needed in 2025's climate.

Marketing Automation and Intelligent Workflows

Marketing automation has been a staple in the martech stack for over a decade – from email campaign platforms to lead nurturing flows. However, in 2025, automation is becoming smarter and more pervasive, fueled by AI and better data integration. At its core, **marketing automation software automates multi-step marketing tasks** (sending emails, posting social updates, scoring leads, etc.) based on triggers or schedules. What's evolving is that automation is now often augmented[3] with intelligence: instead of static if-then rules configured by marketers, the systems can optimize themselves using machine learning.

One clear trend is **real-time journey orchestration**. Rather than pre-defining a rigid drip campaign for a segment, marketers can set up automation that reacts to individual customer behaviors in near real time. For example, if a prospective buyer visits the pricing page and the case studies page on your site (signals of high intent), your automation could immediately send a personalized email with a ROI calculator or invite them to schedule a demo – capitalizing on their interest when it's hottest.[3] If they ignore the email but later click an ad for your product, the system might then trigger a different follow-up knowing the first tactic didn't land. This level of responsiveness requires integration of web analytics, email, CRM, advertising platforms, etc., which again underscores the importance of a central data platform (CDP) to feed the automation tool.[9]

The rise of **multi-channel automation** is also notable. It's not just email anymore – modern marketing automation[9] coordinates email, SMS, in-app messages, chatbots, direct mail, and more, ensuring the customer gets the right touch on the right channel. With buyers now using an average of 10 different channels[22] to interact with suppliers, the ability to automate coordination among channels is crucial. If a customer engages via a webinar, the follow-up might include an automated LinkedIn message from a rep, coupled with adding that person to a targeted ad audience – all without manual intervention, based on workflows set up in advance.

AI's infusion into marketing automation shows up[13] in features like send-time optimization (the system learns when each recipient is most likely to open emails and sends individually timed messages), content recommendations (automatically personalizing which piece of content or product a user sees next, similar to e-commerce recommendation engines), and even automated writing. Some automation platforms now offer AI-generated subject lines or social posts, giving marketers a first draft to approve or edit. This not only saves time but can improve performance by leveraging AI's ability to test variations.

For CMOs, the key is to **ensure their teams fully exploit the capabilities of their marketing automation investments**. Many organizations under-utilize their automation tools, using them for basic batch emails when they could be running sophisticated, branching customer journeys. In 2025, an "intelligent" automation approach is a competitive differentiator – it means your brand responds to customers faster, more relevantly, and at scale. Consider also the internal efficiency: **AI and automation can save significant time on manual tasks**, freeing marketers for strategic work. Google's AI-driven ad tools, for instance, can save marketers up to 20 hours per week on campaign management.[15]

However, human oversight remains vital. Automation should not equal "autopilot." Marketers must continuously monitor the customer experience being delivered. There's potential for mistake (e.g., overly frequent messages if rules overlap, or impersonal tone if AI content is unrefined). Best practice is to start with small automations, measure impact, and build confidence to expand further. As one Martech commentator put it, this is the time to **"pivot away from Super Bowl–sized campaigns, and invest in more efficient, agile, and approachable strategies"** – and intelligent automation[9] is exactly the kind of efficient strategy that can replace brute-force spending with precision targeting.

Lessons from Past Downturns: Historical Parallels

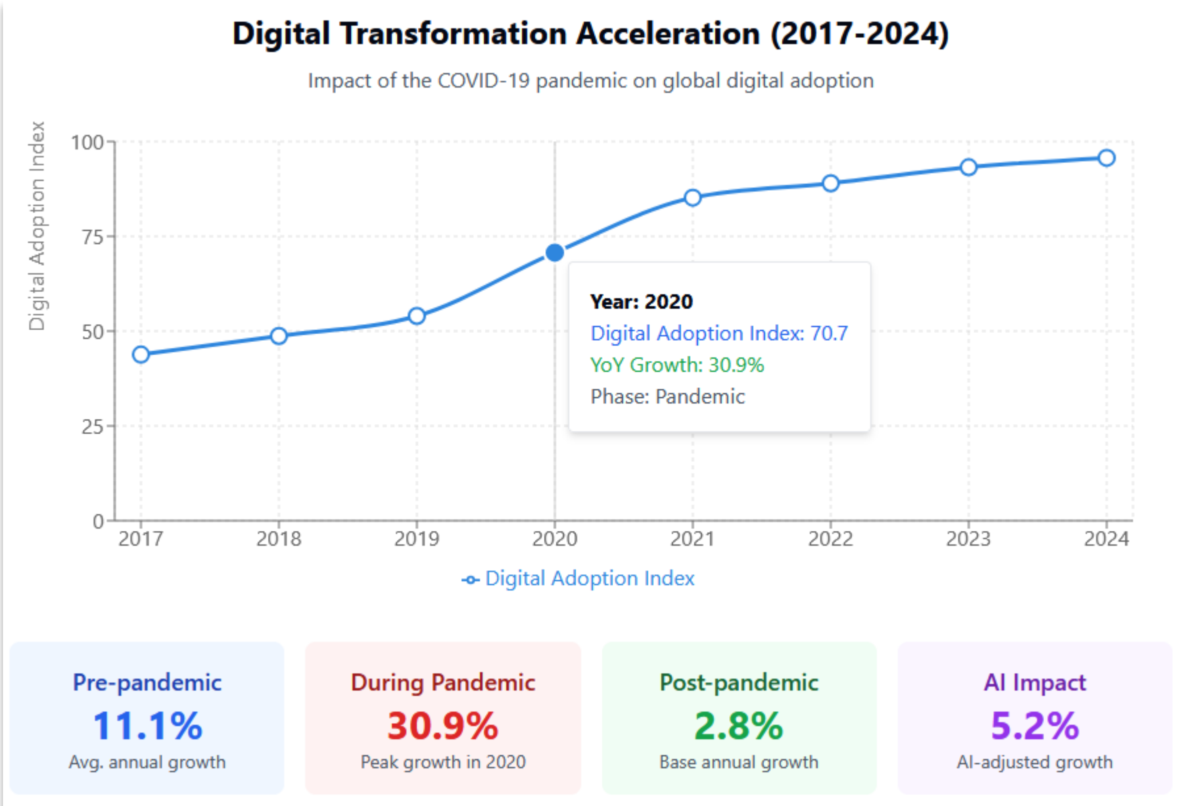
History doesn't repeat exactly, but it often rhymes. As CMOs shape strategy in today's economic climate, it's instructive to look at how marketing and technology played out in analogous periods of disruption or downturn. **The dot-com bust of the early 2000s, the 2008 Great Recession, the COVID-19 pandemic,** and even the **Great Depression** all offer lessons and patterns for how marketing strategy can adapt – and what pitfalls to avoid. Here we highlight key takeaways from these periods:

> *"Don't mistake the bursting of a hype bubble for the end of an era"*

- **Dot-Com Bust (2000–2002): Long-Term Tech Wins Out.** The late 1990s saw a frenzy of investment in internet startups, followed by the dramatic crash in 2000. Many companies tightened their belts on digital initiatives amid the uncertainty. However, the core technology – the internet – was not a fad; it continued to advance exponentially. As Publicis Sapient CEO Nigel Vaz noted, *"the internet itself wasn't a casualty of the dot-com bust… instead, the internet accelerated, transforming the way we live and do business"*. In 2000, roughly half of American adults were online; by 2023, that figure reached 95%. The lesson for today: **don't mistake the bursting of a hype bubble for the end of an era**. We see a parallel in the current AI boom – early exuberance may temper, and some AI ventures will falter, but the underlying trend (AI transforming business) will march on. Smart CMOs will take a long view, continuing to build AI and digital capabilities even if short-term economic factors call for caution. Those who invested in digital customer experience after the dot-com bust (think of retailers embracing e-commerce in the early 2000s) were far better positioned for the subsequent growth than those who paused all internet projects.

- **Great Recession (2008–2009): The Rise of Digital and Agile Marketing.** The global financial crisis hit marketing budgets hard; many companies slashed advertising in 2008-09.[8] Yet, within this period we saw **digital marketing come into its own**. With reduced budgets, marketers shifted to channels that were cheaper and more measurable – notably online search and emerging social media. Indeed, **search advertising grew in 2009** even as overall ad spend fell, because advertisers looked for "secure and effective" ROI during the meltdown. Brands that maintained a marketing presence – often by reallocating to digital – recovered faster. An example often cited is how some consumer brands kept engaging customers through social media or grassroots campaigns, building loyalty that paid off post-recession. Also, the recession forced marketing teams to become **more data-driven and agile**, foreshadowing today's practices. A LinkedIn analysis reflects that "*Agile marketing and data-informed decision making are proven strategies to help brands survive recessions… exploring new methods with faster turnaround, reimagining existing resources*" was key in 2008.[16] For instance, Starbucks in 2008, facing sales declines, pivoted to a highly customer-centric digital strategy – launching a feedback portal ("My Starbucks Idea") to crowdsource product ideas and shifting its brand positioning to be more value-focused. This initiative not only reignited customer engagement but also paved the way for the development of their popular loyalty mobile app, all while spending far less than traditional ad campaigns. **The takeaway:** in tough times, **listen to your customers and innovate with low-cost digital tactics**.[12] It can strengthen your brand and even spur new digital business models.

- **COVID-19 Pandemic (2020–2021): Digital Transformation at Warp Speed.** The pandemic was a unique crisis that shut down physical events and in-person sales almost overnight. Marketing and sales had to go fully virtual. The result was an unprecedented acceleration in digital adoption. As one McKinsey study found, businesses vaulted **5–7 years ahead in digital interactions within just a few months**.[12] By late 2020, more than 80% of customer interactions were digital in nature across many industries, a level not expected until much later.
  For marketers, this period forced rapid deployment of digital engagement tools – from webinars and virtual events to ecommerce and self-service portals. It also highlighted the importance of digital infrastructure (companies with robust marketing automation, e-commerce, or content platforms could pivot faster). Post-pandemic, B2B buyer behavior has permanently changed: many buyers proved they could evaluate and purchase solutions remotely, and they often preferred it. **This period teaches CMOs to be ready for sudden shifts in channel preference** – and that large-scale trials by necessity (like everyone trying online channels) can lead to permanent adoption of new practices. It's also a reminder of the value of being prepared: those who had already invested in digital channels pre-2020 had a head start when COVID hit. Looking forward, CMOs should institutionalize the ability to flex between in-person and digital, since the future likely holds more unforeseen disruptions (hopefully not as severe, but adaptability is now a core competency).[8]



Data Sources:

- McKinsey Global Survey 2020 (2017-2020)
- McKinsey Global Survey on AI 2021: https://www.mckinsey.com/capabilities/quantumblack/our-insights/global-survey-the-state-of-ai-in-2021
- IBM Global AI Adoption Index 2022: https://www.ibm.com/watson/research/wp-content/uploads/2022/05/IBM_Global_AI_Adoption_Index_2022.pdf
- PwC AI Business Survey 2023: https://www.pwc.com/us/en/tech-effect/ai-analytics/ai-business-survey.html
- Stanford HAI AI Index Report 2024: https://aiindex.stanford.edu/report/
- MIT Sloan Management Review (GenAI adoption): https://sloanreview.mit.edu/projects/generative-ai-in-business-survey/
- Gartner AI Survey (Enterprise GenAI adoption): https://www.gartner.com/en/newsroom/press-releases/2023-08-22-gartner-survey-finds-45-percent-of-executive-leaders-say-generative-ai-will-significantly-reduce-costs
- World Economic Forum Digital Transformation Report 2022 (2021)
- Deloitte Digital Transformation Index 2023 (2022-2023)
- Gartner IT Spending Forecast 2024 (2023)
- IDC Worldwide Digital Transformation Spending Guide 2024 (2024)

Note on AI-Adjusted Data (2022-2024):

The 2022-2024 values have been adjusted to reflect the impact of AI and generative AI adoption on digital transformation. This adjustment is based on data from: McKinsey Global Survey on AI 2021, IBM Global AI Adoption Index 2022, PwC AI Business Survey 2023, Stanford HAI AI Index Report 2024, and MIT Sloan Management Review (for GenAI adoption).

Note: The Digital Adoption Index is a composite measure based on digital technology adoption rates across industries. Values are yearly averages derived from quarterly data.

- **Great Depression (1930s): Investing in Brand During a Crisis.** Going further back, the Great Depression offers a legendary marketing case study. As mentioned earlier, cereal maker **Kellogg's famously doubled its advertising budget** during the worst of the Depression (early 1930s), while its competitor Post cut back heavily. Kellogg's bold move included pioneering new media (radio ads) and introducing fresh messaging (the iconic Snap, Crackle, Pop characters

for Rice Krispies). The outcome: **by 1933, with the economy still in shambles, Kellogg's profits had risen almost 30% and it became the category leader**. Post, having gone silent, never regained its former dominance. This stark example underscores a timeless truth – **when competitors go quiet, the field is yours to capture**. Of course, not every company in 2025 can afford to increase budgets in a downturn, but the principle is to **maintain share of voice**[5] and find ways to keep engaging your audience even if spending is modest. Modern equivalents might be ramping up owned media, PR, and thought leadership (which cost more in effort than dollars) to stay visible when others cut marketing. The Kellogg's story also highlights innovation: new channels (radio then, perhaps AI-driven chat or TikTok now) can be surprisingly effective if your competition is slow to venture there.

In summary, past downturns teach us that **marketing should not completely stop in bad times**. The mix and methods should change – toward more efficient, innovative, and customer-focused tactics – but maintaining a dialogue with the market is crucial. Those who invest in understanding customer needs and adapting their value propositions (whether through new messaging, products, or services) often seize the opportunity that crises present. As we face 2025's economic headwinds, CMOs can take heart that **great brands have been built in tough times**, and with prudent strategy, history can rhyme in their favor.

Shifting B2B Customer Behavior and Expectations in the AI Era

If there's one thing that has fundamentally changed for B2B CMOs in recent years – independent of economic cycles[8] – it's the behavior of B2B buyers. Empowered by digital tools and now accustomed to remote interactions (accelerated by the pandemic), B2B customers in 2025 exhibit behaviors more traditionally associated with B2C: they demand convenience, personalization, and seamless experiences across channels. Recent technological advances, from digital platforms to AI-driven services, have only strengthened these expectations. In this section, we examine how B2B customer behavior has shifted and what CMOs must do to meet rising expectations.

B2B customers now have high expectations for personalized, seamless experiences. The gap between what customers want and what brands deliver remains wide in areas like real-time personalization, consistency across channels, and responsible use of data (Adobe Digital Trends 2023 Report). Closing this gap is a critical mandate for CMOs in 2025.[8]

The "Consumerization" of B2B Buying

Today's B2B buyers often behave like consumers doing online shopping. They research extensively online, compare alternatives, read reviews or user feedback, and increasingly, **prefer self-service options** for many stages of the purchase journey. According to industry research, **83% of B2B buyers now prefer to interact via digital channels over talking to a sales representative** for routine interactions. This doesn't mean salespeople are obsolete – but it does mean that buyers will form opinions and narrow choices through digital content long before they engage a salesperson. In fact, by the time a buyer contacts a vendor, they may be 70–80% through their decision process, having already self-educated via webinars, articles, and product demos on the website.

One striking development is the **comfort with big-ticket digital purchases**. Not long ago, it was assumed that large B2B deals had to be done in person. But McKinsey's B2B Pulse in 2024[12] found that even for purchases above $500k, a majority of decision-makers were open to completing the sale via digital self-service or remote human interactions (video calls, etc.). This indicates a permanent shift – digital isn't just for small transactions; enterprise buyers will buy software subscriptions or industrial equipment online if the process is convenient and trustworthy.

The pandemic period ingrained these habits, and there's no full reversion. McKinsey describes a **"rule of thirds"** in B2B sales: roughly one-third of buyer interactions are in-person, one-third via video/phone, and one-third via self-serve digital, and this pattern has held steady post-pandemic.[8] Importantly, buyers expect to be able to use *all three modes as needed*. For example, a buying committee might do initial research through self-service (reading case studies, using interactive ROI calculators on a vendor's site), then schedule a live Zoom demo with the vendor's team (remote interaction), and perhaps have an in-person meeting for final negotiations or implementation planning. CMOs need to ensure their marketing and sales enablement supports this omnichannel fluidity – **any given account may bounce between digital and human touchpoints, and they expect consistency throughout**.

Higher Expectations: Personalization, Speed, and Trust

Digital experiences in B2C (think Amazon's recommendations, or Netflix's personalization) have raised the bar for B2B expectations. B2B buyers, after all, are consumers in their personal lives and bring those standards with them. They now **expect personalized content and offers** that speak directly to their company's needs. A recent survey highlighted that **71% of customers (B2B and B2C) want brands to anticipate their needs with relevant offers, but only 34% of brands succeed in doing so**.[8] This gap illustrates a major opportunity – and pressure – for marketing teams. Providing tailored insights (e.g., industry-specific case studies, recommendations based on a prospect's browsing history) can significantly influence B2B purchase decisions, as it shows the vendor understands the buyer's context.

Speed is another expectation. In the age of on-demand everything, B2B customers don't want to wait days for information. If they submit a contact form or question, they expect a quick response (if not an instant self-service answer). **Real-time engagement** is becoming a differentiator. For instance, some companies deploy chatbots or AI assistants on their site so that when a potential buyer is researching a product, they can get answers immediately or schedule a meeting on the spot. The ON24 marketing trends report[5] notes that by 2025, AI-driven personalization will allow user interactions, preferences, and even global events to be adapted to *"instantly"* – making experiences **"seamless, relevant, and immediate."** In practical terms, this could mean a website that dynamically changes content based on the visitor's industry, or an AI that provides real-time product recommendations in a demo. CMOs should evaluate where delays or friction exist in their current customer journey and consider technology (like chatbots, knowledge bases, or AI routing of inquiries) to meet the expectation of instant service.

Trust and transparency have also come to the forefront. With AI in the mix, business buyers want to trust that they are getting accurate information and that their interactions are secure. If an AI chatbot is answering technical questions, the buyer needs confidence in those answers (which means companies should be transparent that an answer is AI-generated and offer a path to a human for confirmation or more complex queries). Additionally, data privacy is a top concern: clients need to know that any data they share (even just an email for downloading a whitepaper) will be handled respectfully. As mentioned earlier, nearly 9 in 10 consumers (which includes business buyers) **expect assurances that personal data is handled securely**, yet fewer than half of organizations meet that expectation today. For B2B firms, a breach of data or misuse of information can be even more damaging to trust than in B2C, because the relationships (and contract sizes) are larger. Therefore, marketing must work closely with IT and compliance to uphold strong data governance. Highlighting your commitment to privacy[15] – for instance, having clear privacy policies, not over-emailing leads, and using data in ways that genuinely benefit the customer – can become a selling point.

Another new wrinkle is that some B2B buyers are now using **AI tools themselves** to inform their decisions. McKinsey's research identified a segment of decision-makers termed "Innovators" (about 20% of respondents) who are *"on the cutting edge… including using gen AI to research suppliers."* A savvy CMO might ask: how do we ensure our brand is discoverable and credible if a potential client is asking ChatGPT or a similar tool about the "top solutions for X problem"? This opens a new aspect of SEO – not just optimizing for search engines, but also for AI assistants (a concept known as AEO: Answer Engine Optimization). While this is an emerging area, the takeaway is that **customer behavior is increasingly mediated by AI**; marketing strategies must adapt to how information is being sought in 2025.

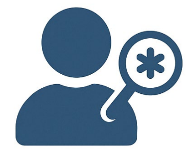
Meeting B2B Customers Where They Are

In response to these shifts, CMOs should champion an outside-in approach: design your marketing and sales experience around how your customers want to buy, not how you traditionally want to sell. Concretely, this means:

- **Develop rich digital self-service content**: Ensure your website, webinars, and digital channels provide in-depth information[4] – demos, pricing guidelines, implementation details, customer reviews or communities – because buyers will seek answers on their own.[8] If you don't provide it, a third-party or competitor will. For example, offering an interactive product tour or a knowledge base can empower prospects to get further on their own before needing a salesperson.

- **Enable seamless channel transitions**: A prospect's journey might start anonymously on your site, then move to a chatbot, then to a video call. Invest in tools (like a CRM integrated with your website and CDP) so that context follows them. There's nothing worse from the buyer's view than having to repeat information at each stage. If they filled out a form about their needs, your sales rep should already know those details in the first meeting. Consistency is key – 78% of customers expect a **consistent experience across digital and physical channels**, yet only 45% of companies feel they deliver that. Closing this gap is a competitive differentiator.

- **Personalize, but don't creep**: Use the data from your CDP to personalize outreach and content – segment by industry, role, and behavior to increase relevance.[9] However, be mindful of not over-personalizing in ways that feel intrusive (the classic line is: personalize *for* the customer's benefit, not *about* everything the company knows). For instance, a welcome email that references a specific article the person read can feel helpful, but an overly granular remark (like "we noticed you hovered over the pricing section for 5 minutes") would feel creepy. Striking the right balance maintains trust while showing attentiveness.



- **Accelerate response times**: Audit your lead response process. If a potential high-value client asks for a demo, how fast do you respond? Reducing that to within hours – or minutes – can significantly increase conversion. Some companies have a "two in 2" rule (respond to any demo or contact request in two hours or less) because the first mover often wins the deal. Consider automation to assist: an AI assistant can send an immediate acknowledgment and perhaps gather additional info, buying you time and keeping the prospect engaged until a human follows up.

- **Emphasize social proof and peer insights**: B2B buyers heavily rely on peer recommendations and third-party validation (more so now when they distrust overly pushy marketing). Encourage and amplify customer testimonials, case studies, and reviews. If your customers are willing, develop them into advocates who can speak in webinars or at events[15] (even virtual ones) that prospects attend. Many buyers in 2025 will trust an unbiased review on Gartner

Peer Insights or G2 Crowd more than a polished brochure. CMOs should integrate these voices into the customer journey.

In essence, the power has shifted to the buyer – and that’s okay. The role of marketing is to **facilitate their journey, not control it**. By aligning with how customers want to research and by providing authentic value at each step, companies build credibility that wins business. The organizations that thrive will be those that treat customer experience as a continuum across marketing and sales, empowered by data and AI to deliver the right touch at the right time.

Strategies for Future-Proofing Martech and Customer Engagement

Bringing together the threads of economic context, tech trends, historical lessons, and buyer expectations, we arrive at the crucial question: **What should CMOs do to future-proof their marketing technology investments and customer engagement strategies, especially in today's climate?** The following strategic recommendations serve as a playbook for marketing leaders looking to balance short-term results with long-term resilience. These best practices are informed by the analysis in this whitepaper and are backed by data and examples cited above.

1. Double-Down on First-Party Data and Unified Customer View

In an era of privacy changes and waning third-party data, building a robust first-party data asset is one of the wisest long-term investments. **Make your Customer Data Platform the cornerstone** of your martech stack. Ensure that all key touchpoints (website, product usage, CRM, support, events) feed data into the CDP so you can analyze and act on a single source of truth about customers. This unified view enables the personalization and predictive analytics that drive revenue. Companies that have done this see clear results – for example, firms leveraging personalization through unified data have increased marketing efficiency by 10–30% and revenue by 5–15%.[4,11] As you invest in data, also invest in **data quality and governance**. Dedicate resources to data cleansing, identity resolution (linking data to the right customer profile), and compliance management. A well-managed data foundation will pay dividends across all marketing programs and make your organization more adaptable to any new channel or tool (since everything plugs into the data layer).

2. Embrace AI, But Tie It to ROI

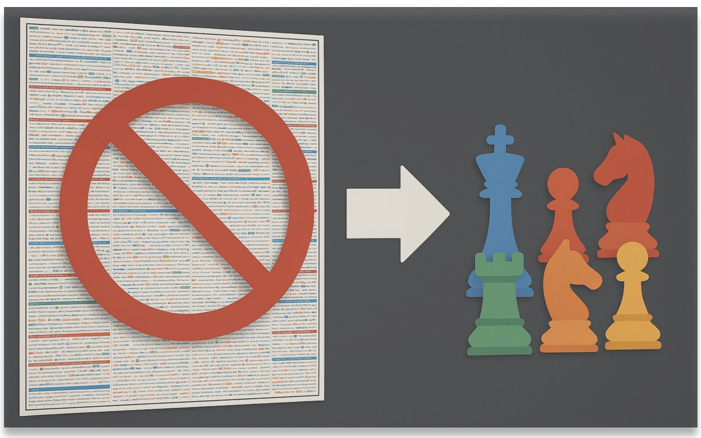
CMOs should support the adoption of AI in marketing – not for hype's sake, but for concrete performance gains. Develop a clear roadmap for how **AI will enhance your marketing value chain**. For instance: use generative AI to scale content creation (blog posts, product descriptions, personalized ad copy), use predictive AI to focus sales efforts on the hottest leads, use AI analytics to find patterns in customer behavior that humans might miss. However, it's critical to **measure the impact**. Identify KPIs for each AI initiative (e.g., content output volume, campaign ROI lift, conversion rate changes) and track performance against a baseline. This serves two purposes: it proves the business case of AI to any skeptics (like a CFO who approved the budget), and it ensures you are actually getting value, not just shiny new tech. Notably, marketers scaling AI have reported impressive ROI improvements – as mentioned, some retail campaigns saw 10–25% higher ROAS with AI. Strive for such wins in your context. At the same time, recognize AI implementation can strain existing processes. **Invest in training your team** on AI tools, hire or develop AI-savvy talent (perhaps a "marketing data scientist" or an AI content specialist), and update workflows to integrate AI outputs smoothly (for example, content reviewers who edit AI-generated drafts). By treating AI as an augmentation of your team, not a magic black box, you'll get the best results and team buy-in.

3. Prioritize Agile Marketing and Experimentation

In uncertain times, the ability to pivot quickly is a superpower. Adopt an **agile marketing approach** – plan in shorter cycles, frequently test new ideas, and use data to decide what to scale or scrap. This might mean shifting from annual campaign planning to a quarterly or monthly "sprint" framework. The goal is to be able to reallocate budget on the fly to what's working and to try creative tactics without excessive red tape. History supports this: companies that experimented with new digital methods in the 2008 recession (like Starbucks crowdsourcing ideas via a new online platform) rebounded faster.[17] Encourage your teams to run A/B tests and pilot programs. Perhaps trial a new AI-driven personalization engine on one product line, or experiment with a new social media channel for a niche segment. If it fails, you've learned cheaply; if it succeeds, you can roll it out broader. Cultivating this test-and-learn culture makes your marketing organization more resilient and innovative. Just as importantly, it guards against large, expensive bets that might not pay off – instead of pouring millions into an unproven campaign, you iteratively invest behind evidence of success.

4. Align Martech Investment with Business Goals (and Rationalize the Rest)

The martech landscape has over 14,000 solutions and growing.[23] It's easy to accumulate a complex stack that isn't fully utilized. Conduct a martech audit to ensure each tool ladders up to a strategic objective. If a tool isn't delivering value or usage, consider retiring it to save cost/complexity. **Consolidate platforms** where possible (for example, if multiple departments use separate email systems or analytics tools, unify them). This not only saves money but also gives a more holistic view of customer interactions. When proposing new investments – say, a new CDP module or analytics suite – frame it in



terms of business outcomes (e.g., "*This will improve our Marketing Qualified Lead to Sales Qualified Lead (MQL-to-SQL) conversion by 20% by enabling better lead scoring*". In 2025's climate, the C-suite will approve spend that clearly drives growth or efficiency. Be prepared to show projections and later results. Additionally, partner with your CIO/CTO on these decisions. Building a strong CMO-CIO alliance ensures that marketing's tech aligns with enterprise architecture and that you have IT support for integration and security. Future-proofing means selecting platforms that are flexible and scalable – cloud-based, API-friendly tools that can evolve as new channels (or unforeseen needs) emerge.

5. Focus on Customer Value and Relationships, Not Just Acquisition

When budgets tighten, shifting focus to **customer retention and expansion** is often wise. It typically costs less to upsell or keep an existing customer than to win a new one. Leverage your martech to deepen customer engagement: use your CRM and analytics to identify at-risk customers and deploy targeted retention campaigns (perhaps an exclusive offer or extra support touchpoint). Implement account-based marketing (ABM) for your top clients – coordinate personalized outreach that continues well after the sale, positioning you as a long-term partner. History shows that brands that invest in customer relationships during tough times can capture loyalty that translates to growth when conditions improve. A classic example is how some companies during downturns created user communities or forums (low-cost, high engagement) to support customers, which paid off in loyalty. In the modern context, consider initiatives like customer advisory boards, VIP webinars/training for clients, or content specifically aimed at helping customers get more value from your product or navigate their own challenges. This not only drives retention but can generate advocacy – turning your best customers into brand ambassadors.

6. Maintain Brand Visibility (Smartly)

Echoing the Kellogg's vs. Post story from the Depression[11], find ways to maintain an appropriate level of brand presence even if competitors pull back. This doesn't mean wasteful spending on vanity projects; it means **strategic visibility**. For instance, increase your share of voice in digital channels where costs are relatively lower – content marketing, SEO, thought leadership on LinkedIn, or PR by contributing expert articles. These can often be done with internal expertise and modest budgets. If your competitors slash their marketing, the playing field has fewer players, and your message can stand out more. Also consider **targeted advertising** to key segments rather than broad-based campaigns. You might cut the big trade-show event spend (especially if ROI was questionable) and divert some of that budget into a targeted account-based ad campaign that keeps your brand in front of your top 50 prospects through 2025. The key is to avoid going dark; out of sight can become out of mind. Even maintaining a steady drumbeat of activity – webinars, thought pieces, customer success stories – can signal strength and stability to the market, which is valuable when buyers are extra cautious about which partners will endure uncertain times.

7. Prepare for Future Trends: Build a Flexible Foundation

Lastly, future-proofing means not just reacting to current trends but **anticipating tomorrow's**. Technologies like AI will continue to evolve (today's GPT-4 might be surpassed by next-gen models with new capabilities), and new channels (voice interfaces, AR/VR meetings, etc.) could gain traction in B2B. The best way to be ready is to build a marketing organization that is inherently adaptable. Architect your martech with modularity – e.g., use robust APIs and middleware so you can plug in a new AI service or data source easily. Invest in talent development: encourage your team to continuously learn (perhaps subsidize certifications in data analytics or AI, or have "lab days" for experimenting with new tools). Keep an eye on emerging consumer trends too, as B2B often follows B2C with a lag. For example, if AI assistants become common in consumer customer service, B2B buyers may soon expect similar instant support in complex industries. By forecasting how things like **AI, automation, and changing buyer demographics** (millennials now dominate many decision-making roles and expect digital-first interactions) will shape the landscape, you can start adjusting strategies before you're forced to. In Gartner's view, successful CMOs in an AI-powered future will be those who "deliver on the innovation, investments and initiatives that enable them to capitalize on opportunities and prepare for disruption"[17]. In practice, that means budgeting some portion of time and resources for innovation – even when you're under pressure for immediate results. It's a balance of exploiting current known tactics and exploring new ones.

Conclusion and Next Steps

Marketing in 2025 sits at the intersection of caution and boldness. The **macroeconomic signals urge caution** – focus on efficiency, justify every dollar, be ready to pivot if conditions worsen. Yet the **technological and consumer signals urge boldness** – adopt new tools, meet customers' elevated expectations, and don't lose momentum on strategic initiatives. The "2025 Martech & AI Playbook for CMOs" has outlined how to reconcile these by being smart about where to cut and where to invest.

To recap, CMOs should ground decisions in data: use economic and customer insights (like those in this paper) to guide strategy. History reminds us that cutting marketing to the bone in tough times can be a mistake – it's about **investing in the right areas** (high-ROI channels, customer loyalty, innovation) while trimming the fat elsewhere. Technology – from AI to CDPs – is your ally in doing more with less, but only if implemented with clear purpose and integration.

An executive-friendly structure for rolling out these ideas in your organization could be:

- **Section 1: Current Outlook and Challenges** – Present the economic context to your team and why status quo marketing won't suffice.
- **Section 2: Key Trends (AI, Data, Automation)** – Educate stakeholders on how these trends can help address the challenges (backed by examples like those cited here).
- **Section 3: Strategic Priorities** – List the 5–7 initiatives you plan to undertake (e.g., "Implement CDP for unified data by Q3", "Pilot generative AI for content in Q2", "Reallocate 20% of event budget to digital"), with rationale and expected outcomes.
- **Section 4: Action Plan and Timeline** – An 8–10 page internal plan should conclude with a roadmap: immediate next steps (next 0–3 months), mid-term (3–

6 months), and longer term. Include owners for each initiative and how you will measure success (KPIs).

- **Section 5: References and Case Studies** – Arm yourself with the data points and cases (many provided in this document) to support your plan when communicating with the C-suite or board. For instance, cite the stat that **74% of CMOs prioritize predictive analytics** or the Kellogg's story to reinforce why certain actions matter.

By following the playbook outlined and tailoring it to your company's situation, you can not only navigate the current headwinds but set your marketing organization up for sustained success. The role of the CMO is expanding – part economist, part technologist, part customer champion – and 2025 will test these multifaceted skills. The encouraging news is that those who adapt and stay customer-centric will find plenty of opportunity amid the uncertainty. As past downturns have shown and present trends confirm, **strategic marketing leadership can turn a challenging year into a springboard for growth**.

Sources:

1. Oxford Economics – *Economic outlook for 2025 and implications for corporate planning*
https://www.oxfordeconomics.com/resource/economic-outlook-for-2025-and-implications-for-corporate-planning/

2. EY-Parthenon – US Economic Outlook March 2025
https://www.ey.com/en_us/insights/strategy/macroeconomics/us-economic-outlook

3. eMarketer/CMSWire – Online Ad Spending in 2009
https://www.cmswire.com/cms/web-content/the-rise-and-fall-of-online-advertising-in-2009-003687.php

4. Bain & Company – For Marketers, Generative AI Moves from Novelty to Necessity
https://www.bain.com/insights/for-marketers-generative-ai-moves-from-novelty-to-necessity

5. ON24/Deloitte – Top AI Marketing Predictions for 2025
https://www.on24.com/blog/ai-marketing-predictions-for-2025-emerging-trends-shaping-the-future/

6. Bench Media/Gartner – AI in Marketing (Predictive Analytics statistic)
https://benchmedia.com/blog/ai-marketing-revolution-marketers-guide/

7. VWO/Markets&Markets – Customer Data Platform Market Size 2024
https://vwo.com/blog/customer-data-platform-statistics/

8. Adobe - 2025 AI and Digital Trends
https://business.adobe.com/resources/digital-trends-report.html

9. LinkedIn (Countdown Agency) – Lessons from 2008 Recession (Starbucks case study)
https://www.linkedin.com/pulse/lessons-from-2008-effective-marketing-uncertain-economy-/

10. Publicis Sapient – Lessons from Dot-Com Bubble for AI Boom
https://www.publicissapient.com/insights/lessons-for-ai-boom

11. Renaissance Marketer/New Yorker – Kellogg's in the Great Depression
https://renaissancemarketer.com/case-study/recession-case-study-kelloggs-cereal-campaign-during-the-great-depression-1930s/

12. McKinsey B2B Pulse 2024 – B2B Buyer Omnichannel Preferences
https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/five-fundamental-truths-how-b2b-winners-keep-growing

13. Consultancy UK – Covid-19 has accelerated digital transformation by seven years
https://www.consultancy.uk/news/26372/covid-19-has-accelerated-digital-transformation-by-seven-years

14. Adobe Digital Trends 2024 – Consumer Expectations on Omnichannel & Data
https://business.adobe.com/resources/reports/retail-digital-trends.html

15. Bench Media - A Marketers Guide: Making the Most of Artificial intelligence https://benchmedia.com/blog/ai-marketing-revolution-marketers-guide

16. The Rise Of The Self-Reliant B2B Buyer: How Digital Commerce Is Shaping Buying Decisions https://salestechstar.com/staff-writers/the-rise-of-the-self-reliant-b2b-buyer-how-digital-commerce-is-shaping-buying-decisions

17. Gartner - The Future of Marketing: 6 Trends and Predictions for 2025 https://www.gartner.com/en/marketing/topics/top-trends-and-predictions-for-the-future-of-marketing

18. Harvard Business Review – Roaring Out of Recession https://hbr.org/2010/03/roaring-out-of-recession

19. Digital Commerce 360 – Report: Ecommerce is the top B2B sales channel https://www.digitalcommerce360.com/2024/09/24/ecommerce-b2b-sales-top-channel-infographic/

20. Oxford Economics – Past rate hikes dampen prospects for industrial production until 2025 https://www.oxfordeconomics.com/resource/industry-forecast-highlights-past-rate-hikes-dampen-prospects-for-industrial-production-until-2025/

21. GTreasury – Strong Dollar vs. Weak Dollar: What Treasurers Need to Know https://www.gtreasury.com/posts/strong-dollar-vs-weak-dollar-what-treasurers-need-to-know

22. Harvard Business Review – How B2B Businesses Can Get Omnichannel Sales Right https://hbr.org/2022/01/how-b2b-businesses-can-get-omnichannel-sales-right

23. 2024 Marketing Technology Landscape Supergraphic https://chiefmartec.com/2024/05/2024-marketing-technology-landscape-supergraphic-14106-martech-products-27-8-growth-yoy/