Rethinking B2B Marketing Execution:
The Age of Execution Reinvention

May 2025

Report commissioned by 2X

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Definition and Methodology

- Definition of B2B Marketing Outsourcing
- Research Approach and Methodology

Definition of B2B marketing outsourcing

B2B marketing functions							
Executive/ Strategy	**Corporate/ Marketing communications**	**Product/ Portfolio marketing**	**Campaigns/ Demand center**	**Field marketing**	**Channel marketing**	**Marketing operations**	**Marketing intelligence**
Brand strategy	Brand strategy and messaging	Customer segmentation	Campaign design and strategy	Event strategy and execution	Channel selection	Web management and optimization	Market research and competitive analysis
User experience strategy	AR/PR strategy and execution	Competitive and market intelligence	Campaign execution	Account-based experience (ABX) campaign planning, designing, and execution	Multichannel marketing	Commerce cataloging and curation	Customer and account intelligence
GTM strategy	Content marketing and digital communications	Messaging and program development	Campaign optimization and support		Channel optimization	Sales enablement	Reporting and analytics
ABX strategy	Internal and employee communications	GTM strategy and execution	Campaign performance evaluation	Performance measurement and optimization	Programmatic ad buying	Loyalty program execution	Sales and marketing alignment
Budgeting and resource allocation	Creative production	Sales and customer success enablement	Content localization and optimization	Stakeholder relationship management	Media measurement	Lead management	Competitive intelligence and benchmarking
Customer retention strategy	Marketing mix strategy				Channel management	Marketing spend effectiveness	Business monitoring
	Content atomization					Loyalty strategy	
						Social/Mobile command center	

Source: Avasant Research

Research approach and methodology



Research approach and methodology

	1. Survey preparation and expert interviews	2. Response gathering and data analysis	3. Report development and publication
Objectives	• Administration of online/telephonic survey by identifying key industry experts	• Identification and review of key themes • Development of a "Table of Contents" for the report	• Analyze and summarize the findings for the final report
Key tasks	• Identifying experts for interviews and developing the questionnaire • Quality check on incoming data • Formulating the initial hypothesis	• Identifying the emerging patterns and key trends from the responses and generating views projecting the same	• Analysis and storyboarding • Developing the interim report • Developing and reviewing the full report

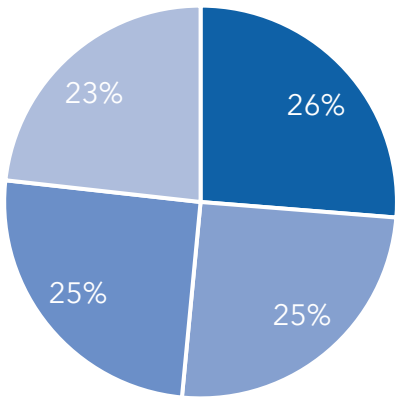
	In-depth interview	Survey	Notes
Number of respondents	11 total respondents	87 total respondents	For a population of enterprises with over $250M in revenue, the survey sample size has a margin of error of ±10% with a confidence level of 95%.
Geographic mix	US: 7 EMEA: 4	US: 40 EMEA: 47	APAC HQ enterprises are excluded from survey analysis as the study focuses on US/EMEA HQ enterprises.
Industry mix	• Financial services • Manufacturing • High-tech (SaaS) • Healthcare		
Revenue mix	$500M+	$250M+	

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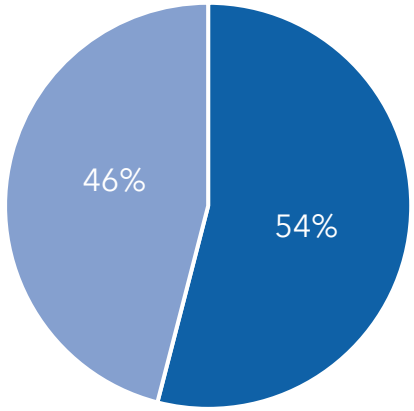
Survey and IDI respondent profile

Survey respondent profile

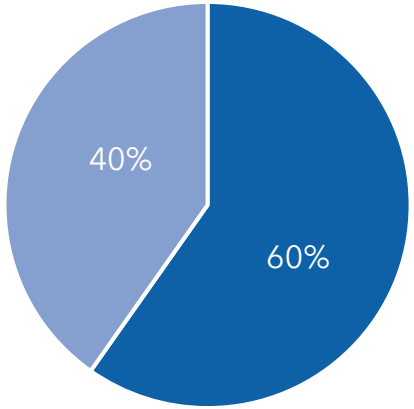
Industry split



HQ geography split



Revenue split



IDI respondent profile

	Respondent title	Respondent company
1	Senior Vice President Corporate Marketing and Communications	A healthcare analytics technology company
2	Group Head of Marketing	A national healthcare provider network
3	Global Marketing Director	A global medical technology conglomerate
4	Director of Global Marketing	A medical device manufacturer
5	Innovation and Marketing Officer	A university-affiliated hospital network
6	VP of Marketing	A global automotive manufacturer
7	Head of Co-Marketing and Brand Experience	An American global financial services firm
8	Head of Brand Marketing	A digital remittance platform
9	Product Marketing Director EMEA	A global SaaS enterprise platform company
10	Regional Head of Developer Marketing, EMEA	A cloud-based data warehousing and analytics provider
11	Group Head of Marketing	A global commercial real estate and investment management firm

Percentages may not add up to 100% due to rounding off.

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Executive Summary

Executive summary

Evolving marketing dynamics are prompting organizations to adopt new execution strategies

- Marketers are rapidly adopting AI-driven campaigns, hyperpersonalization, and intelligent automation to deliver targeted, scalable, and efficient customer experiences.
- Organizations are shifting focus to KPIs that directly measure business outcomes, such as net new revenue, ROI, and customer lifetime value, enabling real-time, data-driven optimization of marketing strategies.
- Enterprises are embracing hybrid and project-based outsourcing models to access specialized expertise, enhance agility, and accelerate growth in increasingly complex marketing environments.

Technology-driven initiatives have become central to marketing and will only grow in importance

- Traditional MarTech solutions still dominate tech spend, with tech accounting for over 20% of the marketing budget. However, investments in emerging tech, currently at 3.5% of the marketing budget and 17.4% of the tech budget, are rapidly increasing, reflecting a strategic push toward automation, analytics, and innovation.
- Gen AI integration into platforms, supported by outsourced expertise, is transforming marketing by enabling scalable, hyperpersonalized content creation and faster campaign execution. Tools such as ChatGPT (27.6%*), Jasper AI (8.6%), and Google Gemini (7.9%) add a competitive advantage and enhance operational efficiency.

Outsourcing is expanding to encompass a wider range of marketing functions

- Core marketing functions such as brand strategy, GTM strategy, budgeting, and customer retention remain predominantly in-house, with less than 25% of functions being outsourced; for instance, executive/strategy (19.4%) and portfolio/product marketing (18.6%). This helps preserve strategic control, cross-functional alignment, and brand stewardship.
- Outsourcing is mainly leveraged for specialized functions, such as campaigns/demand center (60.6%) and channel marketing (61.4%), enabling organizations to access advanced expertise and a skilled talent pool, drive value, and accelerate speed to market.

Source: Avasant Research
*represents the Gen AI platform percentage use

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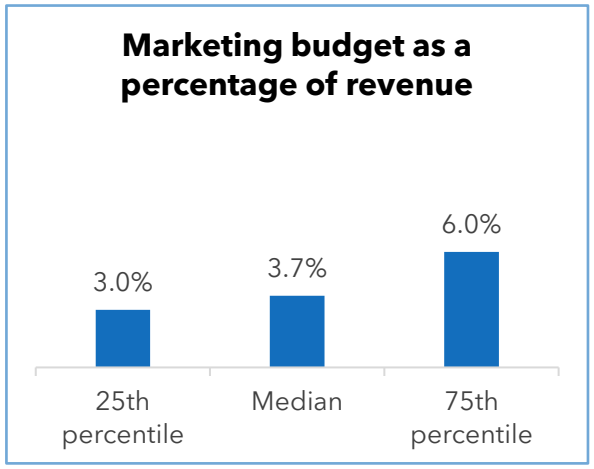
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1. B2B Marketing Services Landscape and Market Overview

Marketers feel underfunded with current marketing budget as a share of revenue



Balanced growth and efficiency: A marketing budget of 3%–4% of revenue indicates a sales-led model, and marketers often feel underfunded; 8-10% (typical in high-tech (SaaS)) signals a marketing-led growth engine.

Investing in marketing creates headroom for both brand-building and demand-generation by leveraging AI personalization and digital channels to optimize the pipeline without sacrificing cost discipline.

Marketing budget as a % of revenue

Financial services 3.2% (25th percentile) · 4.2% (Median) · 5.5% (75th percentile)	• **Customer retention and loyalty focus:** Budget to ensure ongoing investment in loyalty programs, personalized outreach, and AI-driven analytics to deepen relationships more cost-effectively than broad acquisition campaigns. • **Regulatory and compliance communications:** Allocating budget for clear, compliant messaging (for instance, for new regulations or product disclosures) mitigates risk and reinforces trust without requiring excessive ad spend.
Healthcare 2.9% (25th percentile) · 3.4% (Median) · 3.7% (75th percentile)	• **Referral-driven growth focus:** With a heavy reliance on physician referrals and institution partnerships, smaller budgets yield high ROI when focused on targeted educational content and digital thought leadership. • **Reputation management:** Concentrated spend on patient testimonials, accreditation badges, and outcomes data supports reputation, and in turn, demand more efficiently than mass-market advertising.
Manufacturing 2.6% (25th percentile) · 3.0% (Median) · 3.5% (75th percentile)	• **High-impact B2B channels:** Budgets are optimized through select trade shows, channel-partner programs, and account-based marketing tactics that deliver qualified leads without the high cost of consumer campaigns. • **Sales enablement focus:** Investment in technical collateral, product demos, and customer workshops empowers field teams to convert complex product offerings without inflating overall spend.
High-tech (SaaS) 6.4% (25th percentile) · 8.3% (Median) · 10.0% (75th percentile)	• **Rapid brand and demand generation:** Leading spend levels fuel content marketing, performance ads, and community engagement in fast-evolving markets, which is critical for maintaining a top-of-mind presence. • **Agile budget scaling as a growth driver:** Planned budget reflects aggressive growth targets, enabling swift reallocation to high-ROI channels (for example, programmatic and ABX) as market dynamics shift.

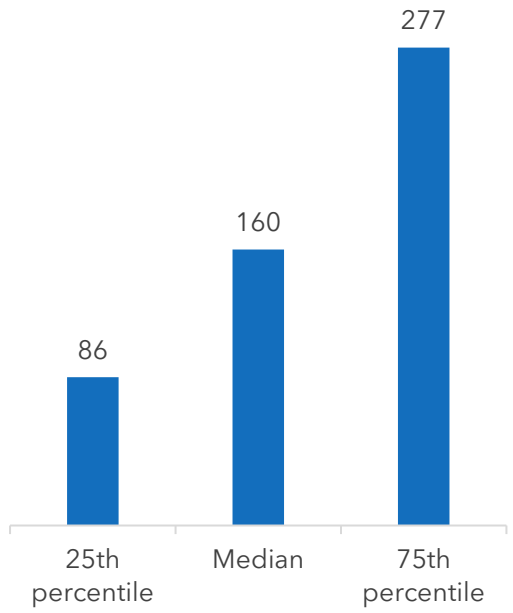
Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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MarTech integrations and enterprise size drive the size of the marketing team

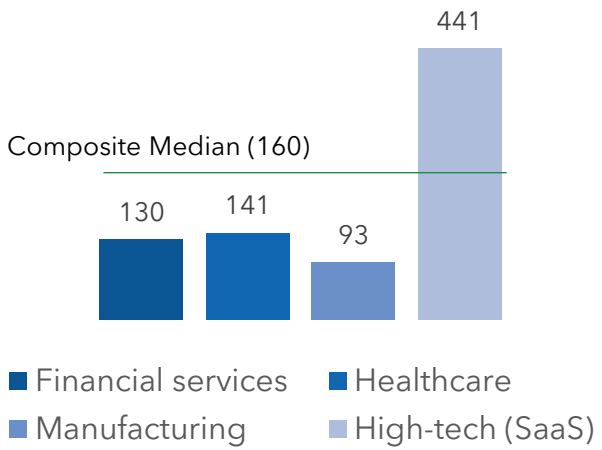
Median marketing employees per billion-dollar revenue

Composite

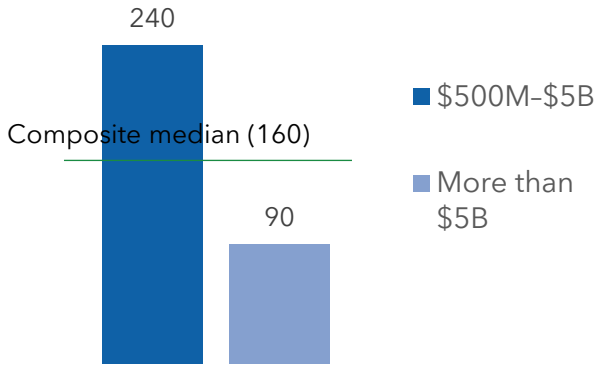


Median marketing employees per billion-dollar revenue

By industry



By enterprise revenue size



- **High-tech (SaaS) has the largest marketing team (with 441 employees per $1B of revenue) due to its focus on rapid growth and experimentation.** This empowers high-tech enterprises to run continuous A/B tests, personalize user journeys at scale, and worthy content—all of which are critical in hyper-competitive, digital-first markets.
- **Manufacturing has the leanest marketing team (with 93 employees per $1B of revenue) as it shifts much of its "marketing" to sales engineers** and distributor networks. A core, centralized marketing team focuses on high-impact technical collateral rather than broad-reach campaigns.

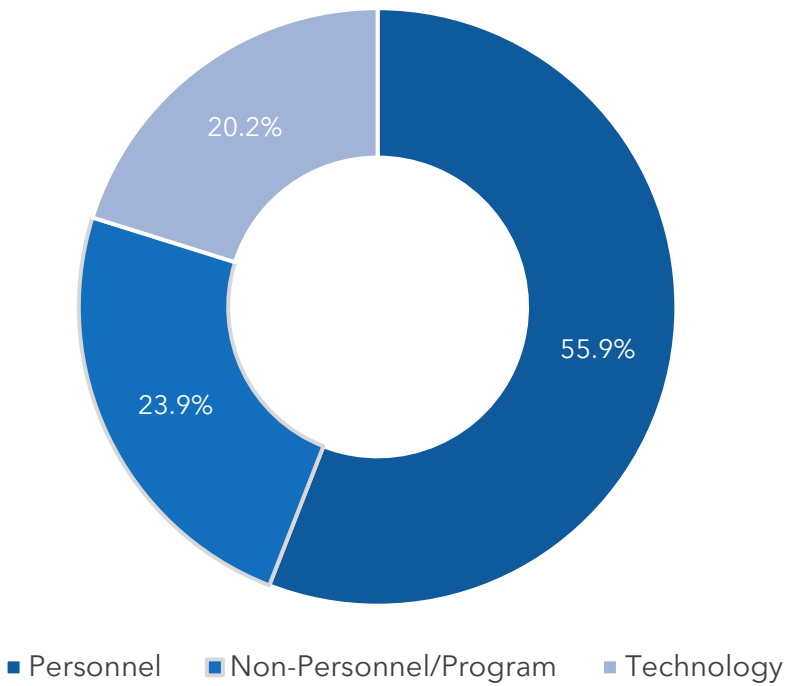
- **Smaller (SME) enterprises (with 240 employees per $1B of revenue) allocate more head count to marketing.** They staff to accelerate brand awareness, fuel inbound pipelines, and outpace incumbents, accepting higher labor costs until they achieve scale, with fewer MarTech integrations and less mature processes.
- **SMEs compensate for inefficiencies and immature processes by adding manual capacity,** whereas large enterprises substitute FTEs with sophisticated automation, outsourcing, and shared-services hubs.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Talent and technology spend are reshaping marketing budgets, dominated by personnel costs; AI-driven tools are prioritized for competitive advantage

Marketing budget split across categories



Marketers spend a large portion of their budgets on in-house personnel (55.9%) and technology (20.2%), leaving fewer dollars for growth-driving programs.

Key observations related to budget categories:

1. Talent and personnel costs reflect market pressures

- The highest budget share is for personnel (55.9%), underscoring intensifying competition and a persistent shortage for skilled marketing professionals.
- Enterprises proactively invest in continuous learning, cross-disciplinary training, and external certifications to bridge skills gap, especially in AI, analytics, and automation.
- These investments are less flexible, as personnel reductions and tech contract changes are difficult, and increased tech spend (especially for AI adoption) further restricts program budgets.

2. Digital transformation and technology integration reshape budgets

- Increased investment in digital platforms, AI, and analytics fundamentally alters traditional budget structures. The proliferation of generative AI and advanced MarTech tools is driving a reallocation of resources toward technology-led initiatives.
- Enterprises are prioritizing the integration of AI and automation tools, not only to enhance efficiency and data-driven decision-making but also to enable real-time campaign optimization and personalized customer experiences.

3. Technology investment as a competitive differentiator

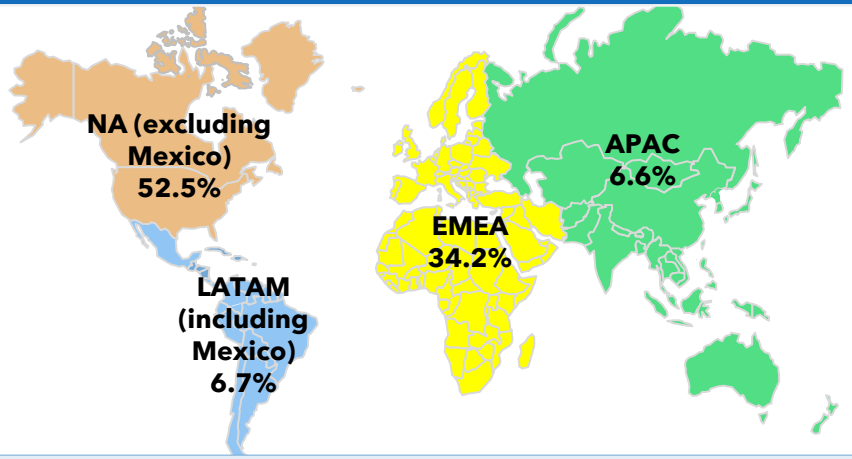
- Enterprises view budget allocation to new technologies as essential for maintaining a competitive edge in saturated markets. Adopting AI-driven analytics, predictive modeling, and automation platforms enables more precise targeting and rapid response to market trends.
- While tech investment is seen as a differentiator, there is insufficient investment in growth initiatives.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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NA and EMEA receive the highest marketing budget and head count allocation, while APAC and LATAM receive smallest shares and rely more on outsourcing

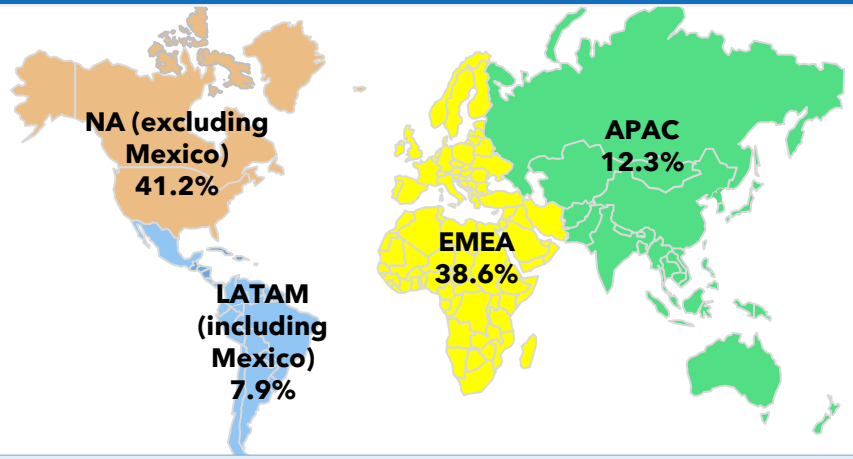
Respondents marketing budget distribution across geographies



- North America (NA) receives the highest budget allocation (52.5%), reflecting its role as a global enterprise hub that requires sophisticated marketing strategies. EMEA follows with 34.2%, driven by its diverse markets and complex regulatory landscape that demands tailored marketing approaches.
- APAC and LATAM currently have smaller budget shares (6.6% and 6.7%, respectively), but are recognized for their growth potential especially as emerging talent hubs and cost-effective outsourcing destinations.

Case in Point: A large company with an offshore team in India faced challenges in execution quality and business understanding. To address this, it introduced structured engagement models that included regular strategic alignment meetings between onshore and offshore teams, clear documentation of workflows and processes, and dedicated liaisons to facilitate communication. These changes significantly improved collaboration and execution quality.

Respondents marketing FTE distribution across geographies



- APAC's higher FTE distribution (12.3%) indicates a strategic focus on leveraging local talent to expand market reach and manage costs, while LATAM is increasingly tapped for its young, tech-savvy workforce.
- The global spread of marketing resources highlights the importance of adapting strategies to local market conditions, regulatory requirements, and cultural nuances.
- Higher budget and in-house resource allocation in mature markets (NA/EMEA) support complex, high-value marketing initiatives, while emerging markets receive targeted investments aimed at rapid growth and efficiency.

"Enterprises are increasingly diversifying their outsourcing portfolios by exploring other geographic options to balance cost, cultural alignment, and time zone compatibility."

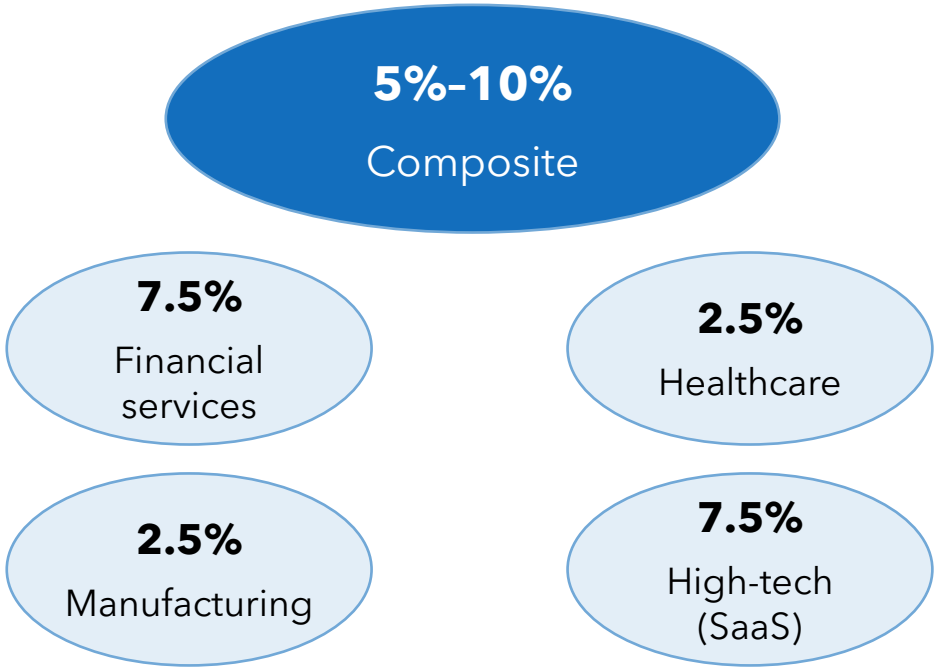
- Group Head of Marketing, a national healthcare provider network

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)
Note: The enterprises in-scope have enterprises in the US and EMEA.

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Marketers face innovation challenges even though marketing budget is anticipated to continue to grow despite a climate of uncertainty

Median marketing budget expected growth range in the next year



"Limited growth reflects a focus on operational stabilization rather than aggressive market expansion. Budgets remain tied to proven B2B strategies rather than experimental approaches."

- VP of Marketing, a global automotive manufacturer

Factors resulting in an increase in B2B marketing budget:

1. **Digital transformation accelerates outsourcing and tech investment:** Rapid digital transformation is shifting budgets to digital channels and increasing demand for AI-driven analytics and automation.
2. **Personalization and real-time engagement fuel demand:** Rising expectations for personalized, real-time experiences push companies to omnichannel engagement and analytics functions.

Challenges impacting how increased budgets are managed:

1. **Economic uncertainty drives cost optimization:** Economic uncertainty is prompting companies to seek specialized expertise, reduce in-house costs, and improve ROI.
2. **Integration challenges increase reliance on external tech talent:** Integrating new technologies with legacy systems remains a major hurdle, leading to greater dependence on talent for AI, data analytics, and technical expertise.
3. **Agility and adaptability are critical amid rapid tech change:** The fast technological change creates uncertainty in long-term planning, making agile operations and partnerships essential.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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The rising budgets are driven by enterprises increasingly deploying AI-driven campaigns and enhancing personalization and automation



Key observations:

- **Boosted conversions and ROI:** AI and automation enable tangible improvements such as increased lead conversion rates, reduced campaign turnaround times, and higher overall ROI.
- **Real-time campaign optimization:** With continuous real-time data from AI tools, organizations now optimize campaigns on the fly, reallocating budgets and adjusting creative elements to maximize impact.
- **Accelerated content production:** AI-driven campaign/targeting helped enterprises reduce content production time by 20% to 30%* and significantly enhance engagement metrics.
- **Dynamic CRM-powered personalization:** Integrated generative AI tools with CRM can create dynamic, personalized content tailored to different customer segments.

Top trends impacting marketing strategy:

1. Automating workflows and predicting behaviors
2. Creating highly targeted campaigns for niche audiences
3. Streamlining and reducing repetitive tasks across the end-to-end marketing workflow

Case in point: The PR process illustrates how in-house AI generates the first draft of a press release (achieving 50%–80% completion), and then the work is outsourced to a partner who polishes the final version, effectively speeding up content production.

"Campaign automation, especially with A/B testing, allows us to quickly determine which messaging works best. Once a threshold is set, the system automatically flips to the better-performing option, making the process seamless and efficient."

- Senior Vice President, Corporate Marketing and Communication, a healthcare analytics technology company

"Using AI to drive programmatic campaigns enables highly personalized outreach, utilizing social determinants, geo-positioning, and geotargeting"

- Innovation and Marketing Officer, a university-affiliated hospital network

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)
*quoted from four IDI respondents

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Enterprises are measuring marketing success through revenue-centered KPIs and business metrics



KPIs tracked for the marketing team:

1. KPIs focusing on revenue and customer behavior

- Organizations prioritize KPIs that directly link marketing activities to revenue generation and customer actions.
- Metrics such as ROI, lead conversion rates, customer lifetime value (CLV), engagement rates, and time to market are consistently tracked, as they reflect the core objectives of driving business growth and customer acquisition.

2. KPI insights driving tactical and strategic adjustments

- Real-time tracking of KPIs enables teams to quickly identify underperforming areas and make data-driven adjustments to campaigns and resource allocation.
- Continuous monitoring and feedback loops support agile improvements, ensuring that marketing strategies remain responsive to changing market conditions and deliver sustained results.

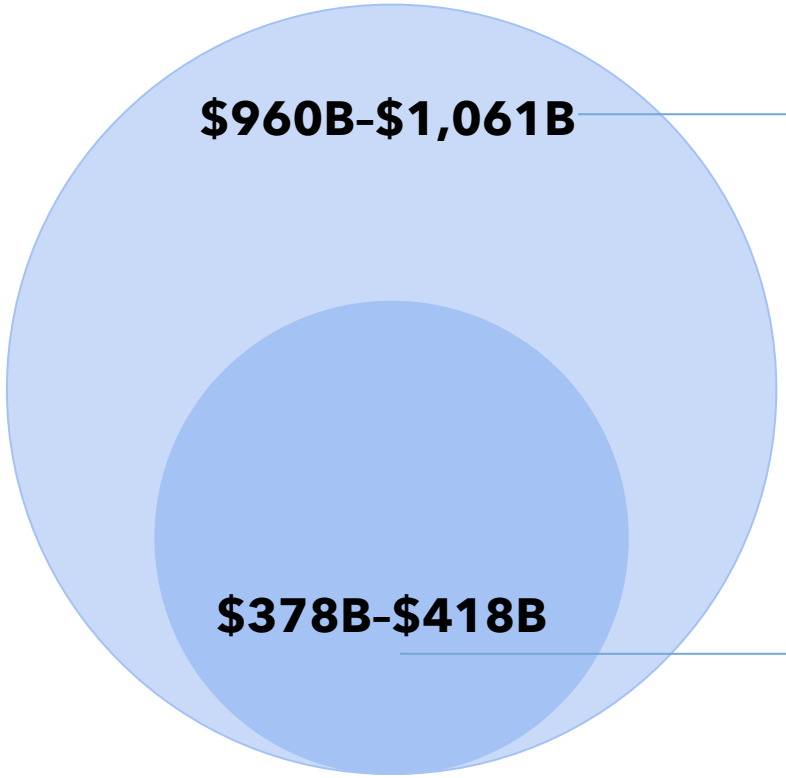
"I believe that tracking soft KPIs isn't always necessary because, ultimately, our business goal is to generate revenue. Our key performance indicators should focus on revenue, pipeline generated, win rates, average deal size, multisocial selling, customer lifetime value, and cycle time. These metrics truly reflect our business performance and success."

- Product Marketing Director, EMEA, a global SaaS enterprise platform company

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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B2B marketing services: TAM and SAM by spend type and industry



Global B2B marketing services TAM*

Spend type	TAM ($B)
Labor	$536–$593
Nonlabor	$230–$254
Technology	$193–$214

Industry	TAM ($B)
Financial services	$305–$337
Healthcare	$46–$51
Manufacturing	$103–$114
High-tech (SaaS)	$154–$170
Others	$352–$389

Global B2B marketing services SAM* (currently being outsourced)

Industry	SAM ($B)
Financial services	$113–$124
Healthcare	$18–$20
Manufacturing	$43–$47
High-tech (SaaS)	$66–$73
Others	$138–$154

*In the context of B2B marketing services, total available market (TAM) is the entire pool of enterprises' annual marketing spend. It represents the maximum revenue opportunity if external service providers captured every dollar of every company's marketing budget.

**Serviceable available market (SAM) is the portion of the total marketing spend that is outsourced today. In other words, it is TAM multiplied by the current marketwide outsourcing penetration rate. It defines the realistic revenue pool for marketing services firms based on today's outsourcing behaviors.

Source: Avasant B2B marketing study survey (n=87); Avasant Research

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B2B marketing services TAM, by industry and geography

$960B–$1,061B

Global B2B marketing services total addressable market (TAM)

HQ geography	TAM ($B)
US	$340–$375
EMEA	$47.7–$53.7
Rest of the world	$572–$632

Industry	TAM ($B)
Financial services	$57–$63
Healthcare	$27–$29
Manufacturing	$25–$27
High-tech (SaaS)	$123–$136
Others	$108–$120

Industry	TAM ($B)
Financial services	$11–$12
Healthcare	$0.3–$0.4
Manufacturing	$2.6–$3.1
High-tech (SaaS)	$0.8–$0.9
Others	$33.0–$47.3

Industry	TAM ($B)
Financial services	$237–$262
Healthcare	$18.9–$20.9
Manufacturing	$76–$84
High-tech (SaaS)	$30–$33
Others	$210–$232

TAM is derived based on the following calculations:
TAM = Total company revenue in respective geographies and industries × B2B marketing spend as a percentage of overall marketing spend × Marketing spend as a percentage of revenue × Spending split for respective geographies and industries (survey n=87)

Source: Avasant B2B marketing study survey (n=87); Avasant Research

B2B marketing services SAM, by industry and geography

$378B–$418B

Global B2B marketing services serviceable available market (SAM)

HQ geography	SAM ($B)
US	$134–$148
EMEA	$19–$21
Rest of the world	$225–$249

Industry	SAM ($B)
Financial services	$23–$25
Healthcare	$10–$11
Manufacturing	$10–$11
High-tech (SaaS)	$52–$58
Others	$39–$42

Industry	SAM ($B)
Financial services	$4.1–$4.2
Healthcare	$0.1–$0.2
Manufacturing	$1.7–$1.9
High-tech (SaaS)	$1.0–$1.2
Others	$12.1–$13.5

Industry	SAM ($B)
Financial services	$86–$95
Healthcare	$7.4–$8.2
Manufacturing	$32–$35
High-tech (SaaS)	$13–$14
Others	$86.6–$96.8

SAM is derived based on the following calculations:
SAM = TAM × current outsourcing penetration for respective geographies and industries (survey n=87)

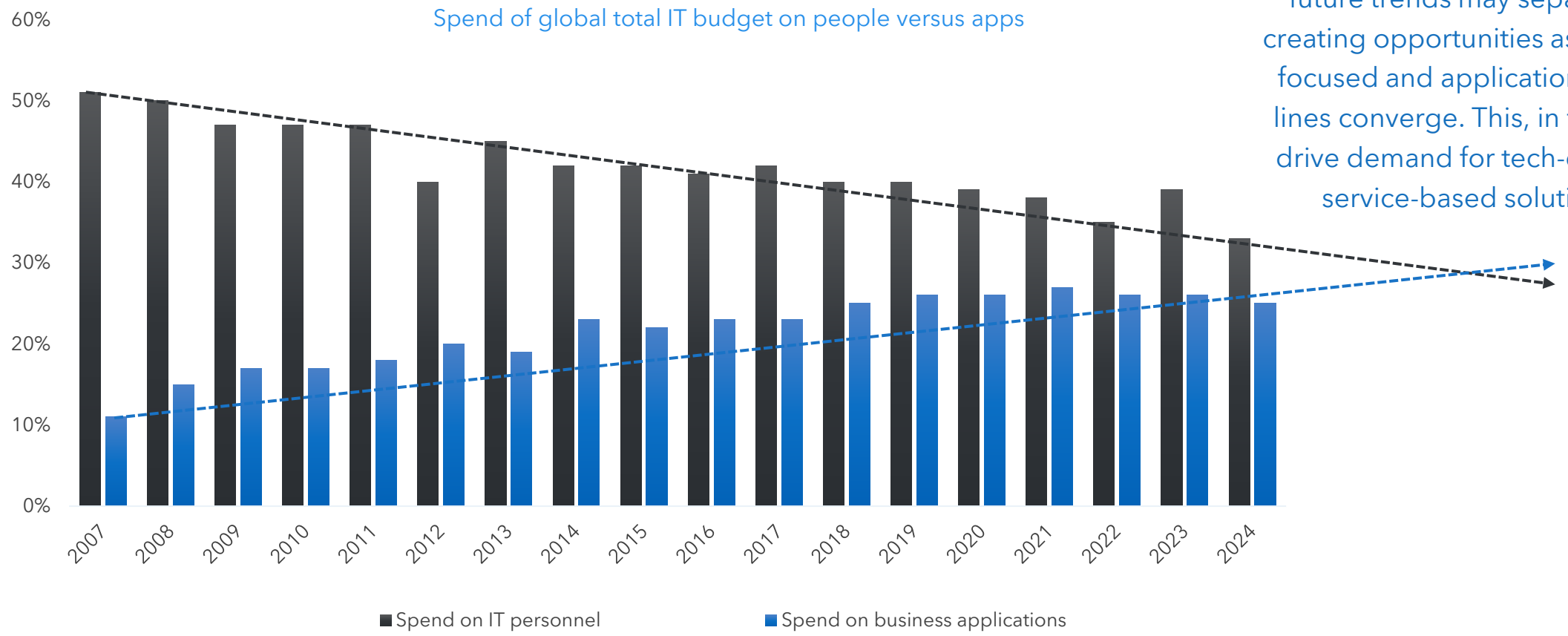
Source: Avasant B2B marketing study survey (n=87); Avasant Research

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2. Talent Optimization and Technology Enabling Data-Driven Innovation

Enterprises have been increasing share of spending on tech apps for the past 15 years; this will accelerate further as enterprise apps integrate AI

Traditional enterprise apps bundled business logic, but future trends may separate it, creating opportunities as people-focused and application spend lines converge. This, in turn, will drive demand for tech-enabled service-based solutions.



Source: Avasant Computer Economics
*Arrows indicate the projection beyond 2024

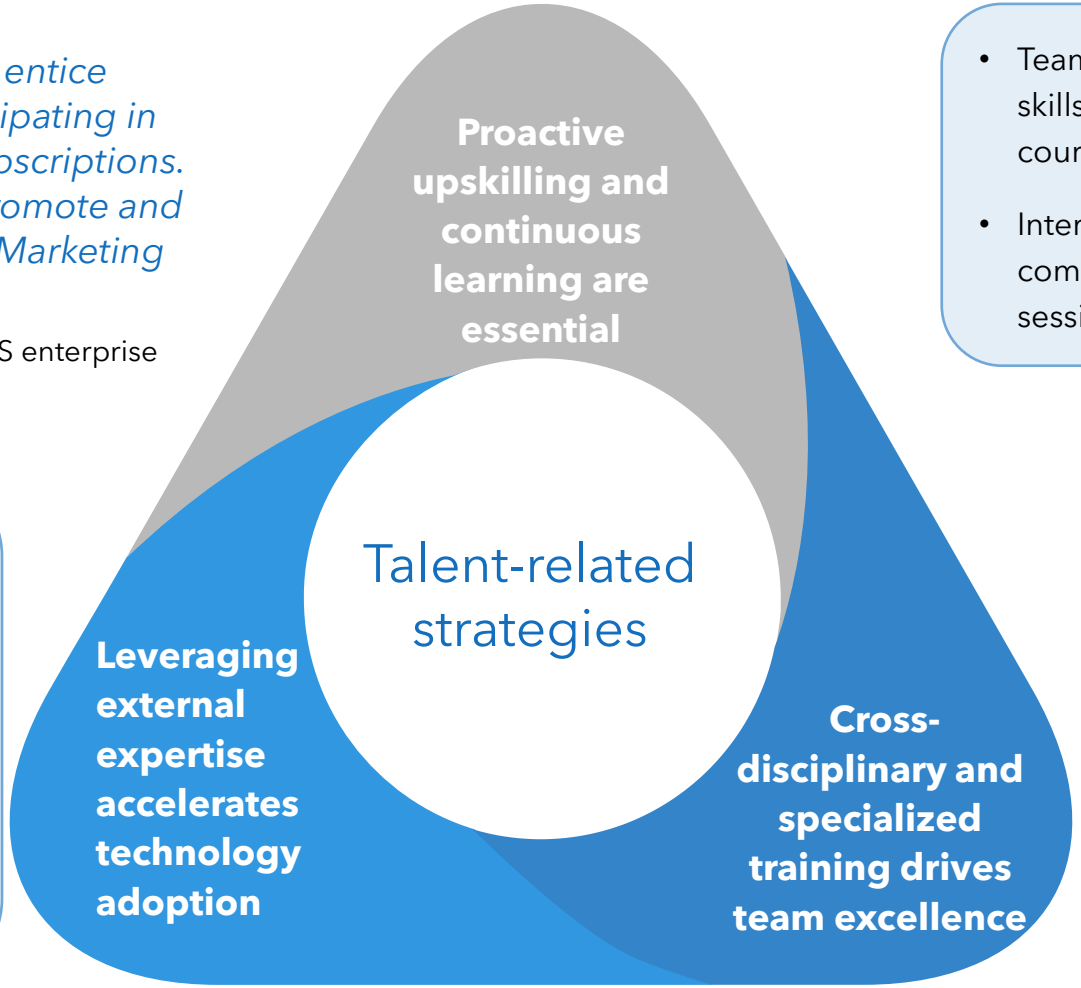
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Teams accelerate marketing impact through continuous upskilling, cross-disciplinary learning, and leveraging external expertise to manage personnel cost

"We proactively allocate a budget to entice marketing personnel to upskill by participating in industry-specific or functional-specific subscriptions. For example, in product marketing, we promote and sponsor memberships with the Product Marketing Alliance (PMA)."

- Product Marketing Director, EMEA, A global SaaS enterprise platform company

- Immersive, hands-on training sessions and bootcamps, where real-life case studies and practical applications are discussed, have a significant impact.
- Experiences with vendor-led certifications (for instance, those provided by major AI and analytics platforms) are instrumental in validating skills and staying current with technological advances.



- Teams are encouraged to regularly update their skills through scheduled training sessions, online courses, and industry webinars.
- Internal knowledge-sharing platforms, such as communities of practice and "lunch and learn" sessions, reinforce a culture of ongoing learning.

- Organizations blend technical expertise (AI, data analytics, and automation) with strategic marketing knowledge through targeted learning programs.
- Specialized technical training, hands-on workshops, and vendor-led certifications ensure teams are equipped with the latest tools and knowledge of industry standards.

Source: Avasant B2B marketing study IDIs (n=11)

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AI-powered skills assessments and gap analysis enable proactive talent planning and help in creating targeted training initiatives

- The adoption of AI tools helps analyze performance data and predict future skill needs based on emerging industry trends.
- These tools forecast which areas will require enhanced expertise, allowing for proactive talent planning and resource allocation.

Skills assessments and gap analysis

- Many organizations conduct periodic skills assessments to benchmark current competencies against future requirements.
- These assessments are instrumental in identifying gaps and informing targeted training initiatives.

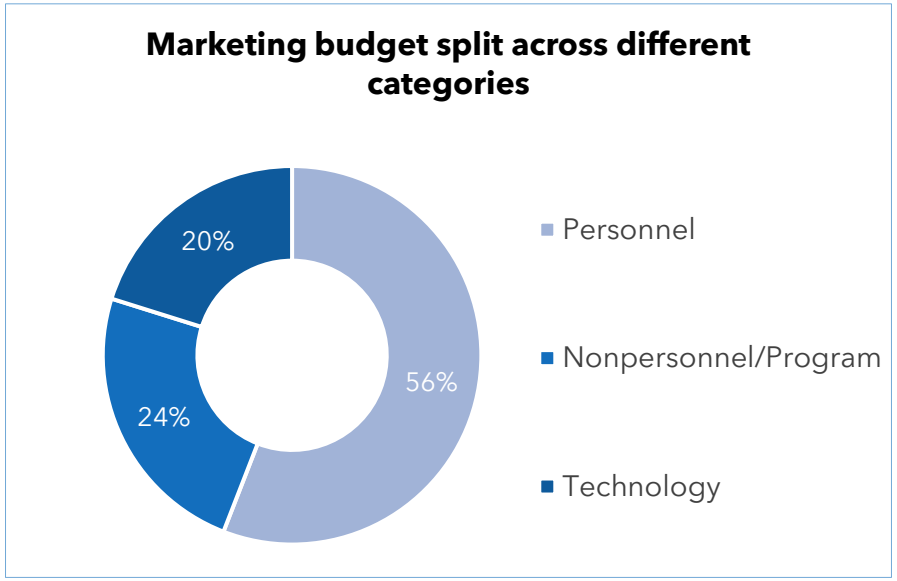
AI-powered talent analytics

Industry benchmarking

- Organizations often benchmark against industry standards and peer performance to understand what skills are becoming critical.
- This external perspective ensures that their talent development strategies remain competitive and aligned with market demands.

Source: Avasant B2B marketing study IDIs (n=11)

Technology products and solutions form a bulk of marketing spend and continue to grow



"At the moment, in-house is the more cost-effective option for us because everything we have is automated. Like I said, it's all tied through Salesforce and Salesforce Marketing Cloud. We're able to track all of our leads, do lead scoring, and manage our campaigns through these platforms. This allows us to perform A/B testing, track clicks, opens, and form submissions."

- Senior Vice President, Corporate Marketing & Communications, a healthcare analytics technology company

Key technologies capturing attention:

- AI, including generative AI for content creation and machine learning for predictive analytics, is transforming how these processes are performed.
- Marketing automation platforms and advanced analytics tools are also critical for enabling more precise targeting and real-time decision-making.

Influence on marketing approaches:

- Organizations see these technologies as a means to enhance personalization, streamline operations, and drive more data-driven strategies.
- AI is viewed as pivotal for improving content creation, automating routine tasks, and providing actionable insights to refine customer targeting.
- Advanced analytics are enabling marketers to move beyond historical data, allowing them to predict future trends and adjust campaigns dynamically.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Enterprises are streamlining the MarTech stack to enhance efficiency

Top three tech products across categories	Rank 1	Rank 2	Rank 3
Customer relationship management (CRM)	Salesforce	Microsoft Dynamics 365	SAP
Digital experience platform (DXP)	Adobe	Sitecore	Liferay
Marketing automation platforms	Salesforce	Adobe	SAP
Account-based experience (ABX)	6sense	zoominfo	cognism
Customer data platform (CDP)	Salesforce	Tealium	Adobe
SEO tools	Semrush	Moz	ahrefs
Sales engagement applications	Salesloft	Outreach	Clari

- **Deep, platform-specific expertise:** Partners must demonstrate hands-on mastery of ecosystems (Salesforce, Adobe, and Microsoft) across CRM, DXP, and marketing automation to ensure rapid onboarding, minimize disruption, and maximize the return on existing investments.
- **Seamless cross-platform integration:** Beyond individual tools, partners need robust skills in unifying multiple systems, such as Salesforce, Adobe, HubSpot, and Semrush, to build a cohesive, data-driven marketing engine.
- **Data fluency and AI-powered insights:** Clients value partners who turn raw data into strategic advantage, interpreting large datasets, running predictive models, and proactively recommending optimizations that elevate campaigns.
- **Customized solutions over one size fits all:** Tailoring technology and processes to each client's unique workflows and business logic is a key differentiator, driving higher adoption and more relevant outcomes.
- **Transparent, collaborative analytics:** Shared, real-time dashboards empower clients and partners to co-own performance metrics, fostering trust and accelerating decision-making.

Case in point: A company that streamlined its MarTech stack from over 15 disconnected tools to an integrated AI-driven platform saw a 50% reduction in operational inefficiency and improved marketing ROI.

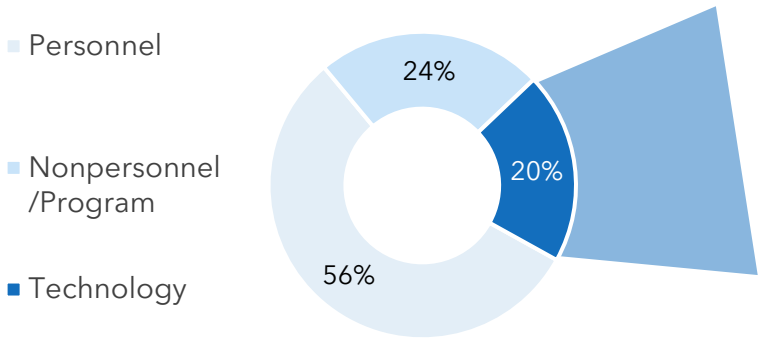
"It's not enough to know the tools; vendors must demonstrate outcomes delivered through them."

- Head of Brand Marketing, a digital remittance platform

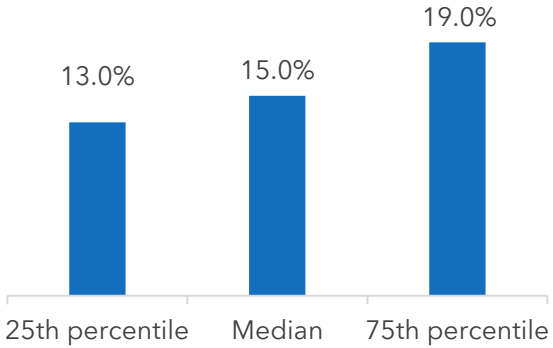
Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

Emerging tech initiatives are driving the growth in technology budget

Marketing budget split across different categories



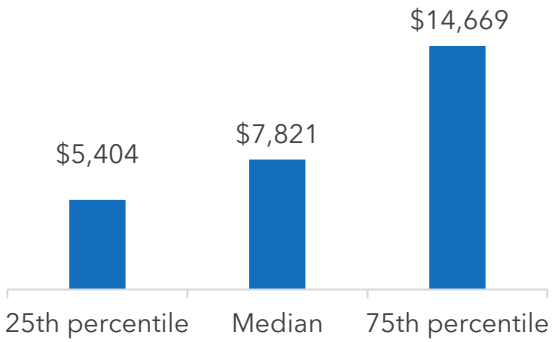
Emerging tech budget as a % of technology budget



Emerging technology refers to innovations such as AI, machine learning, automation, and advanced analytics that drives transformation in marketing and outsourcing.

Case in point: A company that implemented AI-powered dynamic content personalization for email marketing saw a 25% increase in open rates and a 40% boost in click-through rates. The success factors included:
(1) Investing in AI tools that integrated seamlessly with existing MarTech stacks,
(2) Ensuring content remained personalized yet on-brand, and
(3) Monitoring AI-generated outputs to refine messaging over time.

Emerging tech budget per marketing employee



- **AI, automation, and advanced analytics are central to transformation**: Investments in AI, ML, automation, and advanced analytics are reshaping marketing strategies and outsourcing decisions. The integration of these technologies enables more efficient campaign execution, data-driven decision-making, and enhanced personalization.
- **Adoption of specialized MarTech tools:** The proliferation of marketing technology platforms, such as CRM enhancements, data analytics tools, and automation software, is a major driver of change.
- **Pilot projects and measurable impact:** Organizations frequently initiate pilot projects to validate the value of new technologies.
- **Strategic alignment and continuous evaluation:** The decision to invest in emerging technologies is guided by rigorous market research, alignment with strategic priorities, and detailed cost-benefit analysis. Enterprises often use pilot testing, cross-functional collaboration, and continuous monitoring of KPIs to ensure that technology investments deliver measurable value and remain aligned with evolving business goals.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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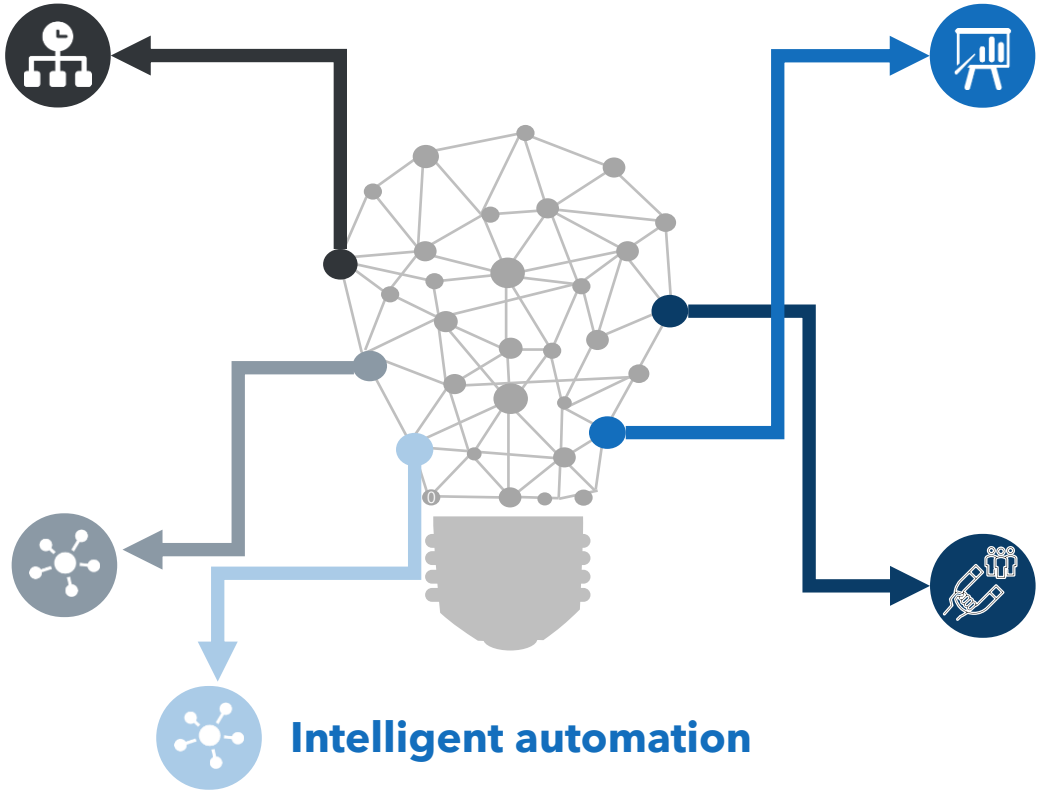
Innovation investment focus is on integrating cutting-edge technology with strategic marketing objectives to achieve measurable business outcomes

AI

- Using AI to segment customer data more effectively leads to more targeted and successful campaigns.
- AI-driven content personalization for a campaign can achieve a notable uplift in lead generation, which directly correlates to a measurable increase in conversion rates.

Analytics

- Combining creative innovation with advanced analytics leads to highly targeted and engaging campaigns.
- Predictive analytics tools help identify emerging trends and adjust targeting strategies proactively.



Intelligent automation

- AI-driven marketing automation implementation with an external partner results in a demonstrated 20% increase in campaign efficiency and a significant reduction in manual processing time.

Generative AI

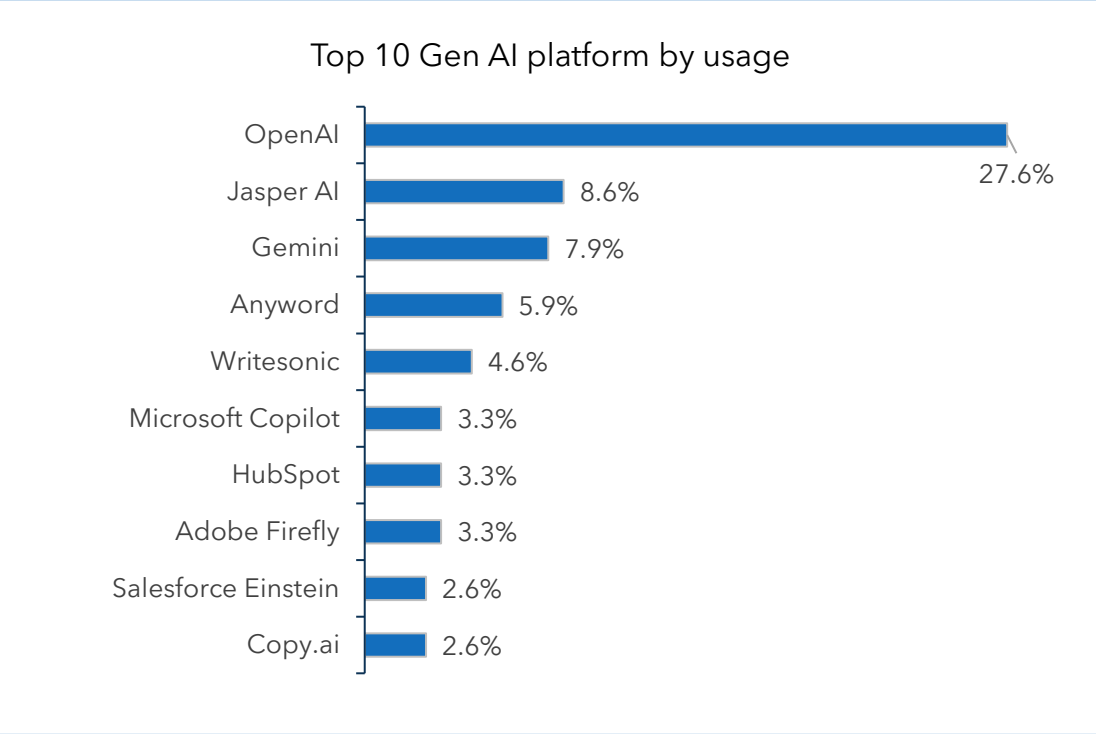
- Tailored content variations helps scale campaigns rapidly and maintain a consistent brand voice.
- Pilot projects can automate creative processes.

Workforce resource management platforms

- Use of integrated platforms, such as Monday, Asana, and Wrike, enables seamless collaboration between in-house and outsourced teams.

Source: Avasant B2B marketing study IDIs (n=11)

Gen AI integration with CRM and outsourced expertise enables scalable, hyperpersonalized content and rapid campaign execution



"Our public relations used to be outsourced to an agency for writing PR releases. Now, we start with in-house AI creating the first draft, which is then refined by our partner. This approach allows us to complete 50% to 80% of the work internally, enabling us to produce more PR releases each week with the same number of people."

- VP of Marketing, a global automotive manufacturer

Most impactful areas

Content creation:

- AI-powered content creation has dramatically reduced production time while enhancing personalization.
- For instance, an organization leveraged Gen AI to produce tailored content, allowing them to scale campaigns rapidly and maintain a consistent brand voice.

Campaign management and lead management:

- Campaign management has become more data-driven. Automation has streamlined lead scoring and nurturing, resulting in more efficient conversion funnels.
- For instance, an organization implemented automated lead management systems integrated with its CRM, which led to quicker follow-ups and improved lead quality.

Market research and analytics:

- AI-enabled market research tools have transformed data analysis, moving from static reports to dynamic, real-time insights.
- For instance, organizations reported that predictive analytics tools helped them proactively identify emerging trends and adjust targeting strategies.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Key considerations for automation and AI tools selection include data silos, rapid platform evolution, and alignment with marketing goals

AI and automation considerations

Data integration issues	• Respondents frequently cited challenges with integrating new MarTech tools with legacy systems, often resulting in fragmented data ecosystems. • Difficulties in harmonizing data from disparate sources have sometimes hindered the ability to generate a unified view of customer interactions.
Platform selection challenges	• The rapid pace of technology evolution makes it difficult to choose platforms that are both current and scalable. • Respondents indicated that assessing long-term viability and compatibility with existing systems is a key part of the selection process.
Alignment with marketing goals	• Ensuring that new solutions directly support strategic marketing objectives is critical. • Some organizations experienced a disconnect between the functionality offered by new tools and the specific needs of their marketing strategies, requiring further customization or additional integration work.

Risks with AI adoption

Algorithmic bias and ethical concerns	• Respondents noted that algorithmic bias remains a significant risk, potentially leading to skewed insights and unfair customer segmentation. • Ethical considerations, including transparency in AI decision-making and the potential for unintended discrimination, are increasingly on the radar.
Data privacy and security	• Concerns regarding the security of AI systems, particularly in terms of data privacy and compliance with evolving regulations, were highlighted. • The risk of data breaches and misuse of customer information was flagged as a critical area requiring robust safeguards.
Reliability and accountability	• There are challenges in ensuring the reliability of AI systems, with some respondents noting that over-reliance on automated insights can obscure accountability. • Establishing clear protocols and fallback measures is essential to mitigate these risks.

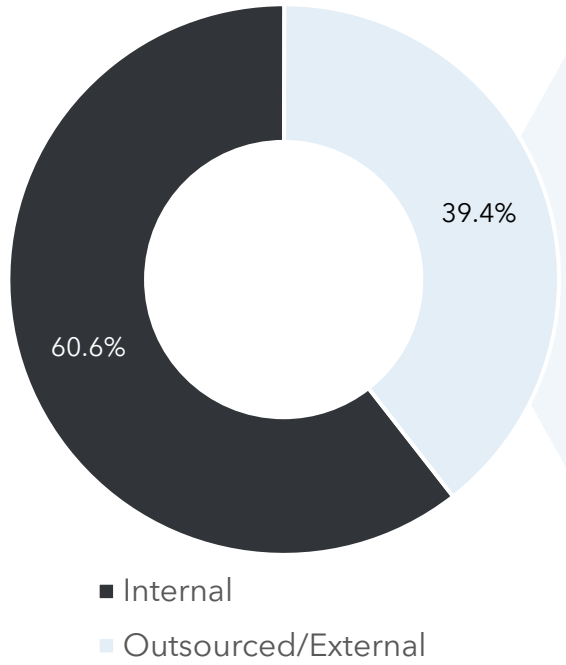
Source: Avasant B2B marketing study IDIs (n=11)

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3. Outsourcing as a Growth Enabler and Workforce Allocation

Internal functions remain the primary focus for marketing activities budgets, with a typical budget split of approximately 60% in-house to about 40% outsourced

Marketing budget split



External drivers of B2B marketing outsourcing

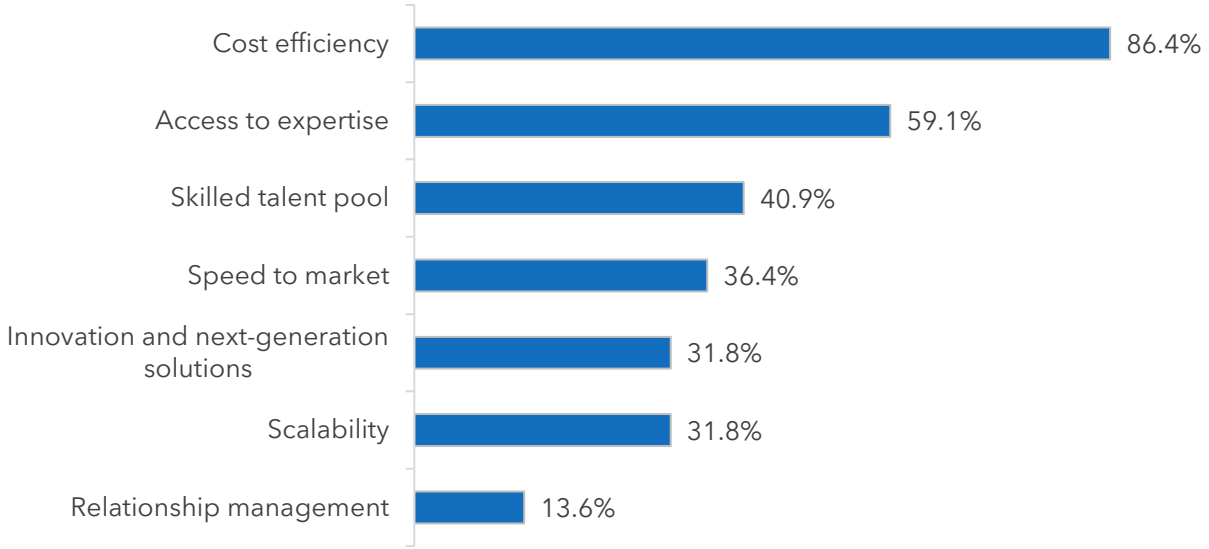
Market dynamics and budget pressures	• Enterprises are leveraging external partners to quickly access specialized skills, particularly as digital transformation accelerates. • As AI and data strategies grow, outsourcing helps companies react quickly without the cost or delay of building in-house. Tools such as Synthesia enable low-cost, multilingual video content from simple text inputs.
Demand for personalization and agility	• Increased customer demand for personalized, data-driven experiences is a key driver in shifting outsourcing strategies. • The need for agile responses to market changes and rapid innovation is pushing organizations to adopt more flexible, outsourced models.
Technology and AI integration	• Integration of AI and automation in marketing has redefined outsourcing expectations. • External providers are increasingly expected to deliver advanced analytics and AI-enabled insights that complement internal strategies.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

B2B marketing outsourcing allows enterprises to focus on strategic priorities by leveraging external expertise and accessing specialized talent

B2B marketing outsourcing advantages

Percent of respondents who ranked the advantages in their top 3



"Fluctuating market conditions and tighter budgets are prompting companies to reallocate resources toward outsourcing."

– Head of Comarketing and Brand Experience, an American global financial services firm

Key observations on partner selection

- **Talent availability and expertise:** The abundance of specialized talent in emerging regions makes them attractive outsourcing destinations for enterprises.
- **Political and economic stability:** Stability in regulatory environments and political climates also influences regional preferences, with companies favoring regions that offer predictability and robust digital infrastructure.
- **Technological advancements:** Rapid technological adoption in certain regions enhances operational capabilities, making them more competitive and attractive for outsourcing partnerships.

"We decided to fully outsource our PR to an agency that did a great job in elevating our brand sentiment and reach. Compared to doing it in-house, it provided better outputs, probably at the same cost."

– Product Marketing Director (EMEA), a global SaaS enterprise platform company

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Trend reflects a strategic move to partner with external experts

Marketing functions	2023 (Percentage of marketing budget for outsourcing)	2024 (Percentage of marketing budget for outsourcing)	YOY change in percentage
Executive/Strategy	10%	12%	+20%
Corporate/Marketing communications	34%	44%	+29%
Portfolio/Product marketing	46%	47%	+2%
Campaigns/Demand center	45%	56%	+24%
Field marketing	39%	48%	+23%
Channel marketing	45%	56%	+24%
Marketing operations	37%	50%	+35%
Marketing intelligence	38%	51%	+34%

Source: Avasant B2B marketing study survey (n=87)

Enterprises evaluate outsourcing on expertise, agility, and ROI impact

Enhanced access to specialized expertise

Outsourcing enables access to specialized skills, such as advanced analytics, creative design, and digital strategy, that are not readily available in-house.

Operational efficiency and speed to market

Outsourcing non-core activities to external partners that have more agile teams and streamlined processes results in quicker turnaround times.

Cost management and flexibility

Outsourcing allows for better cost control, minimizing fixed overheads while enabling variable spending based on project needs.



Data-driven decision making

The need for real-time data and predictive insights drives organizations to outsource functions that can deliver dynamic analytics.

Technological advances

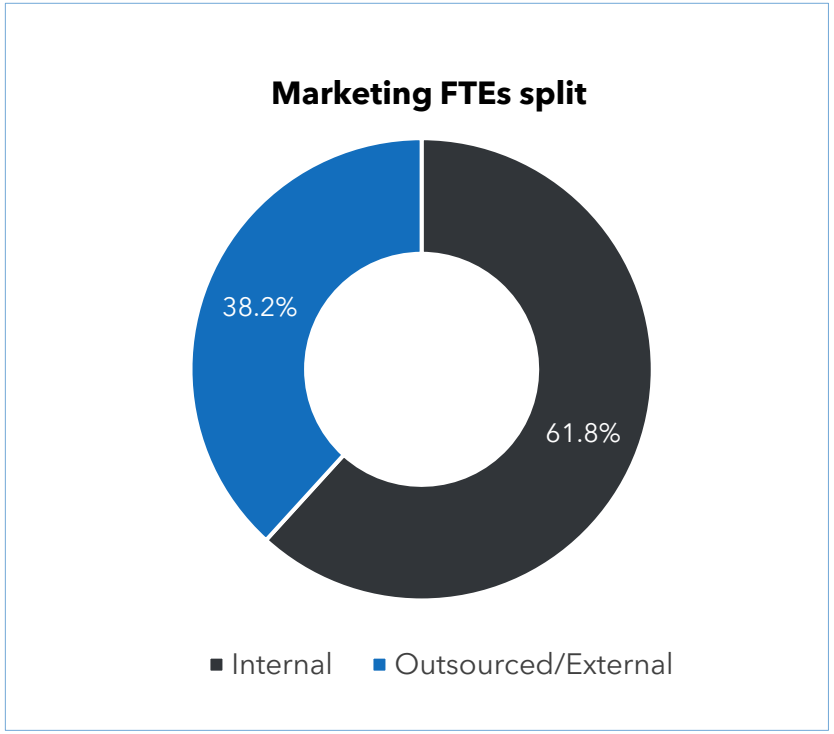
The proliferation of specialized marketing technology platforms is leading companies to seek external partners with deep technical capabilities.

Long-term plan

The need for omnichannel strategies has intensified, pushing organizations to leverage external expertise for cohesive campaign execution.

Source: Avasant B2B marketing study survey IDIs (n=11)

Internal resources remain the primary focus in marketing execution, with higher in-house allocation across sectors



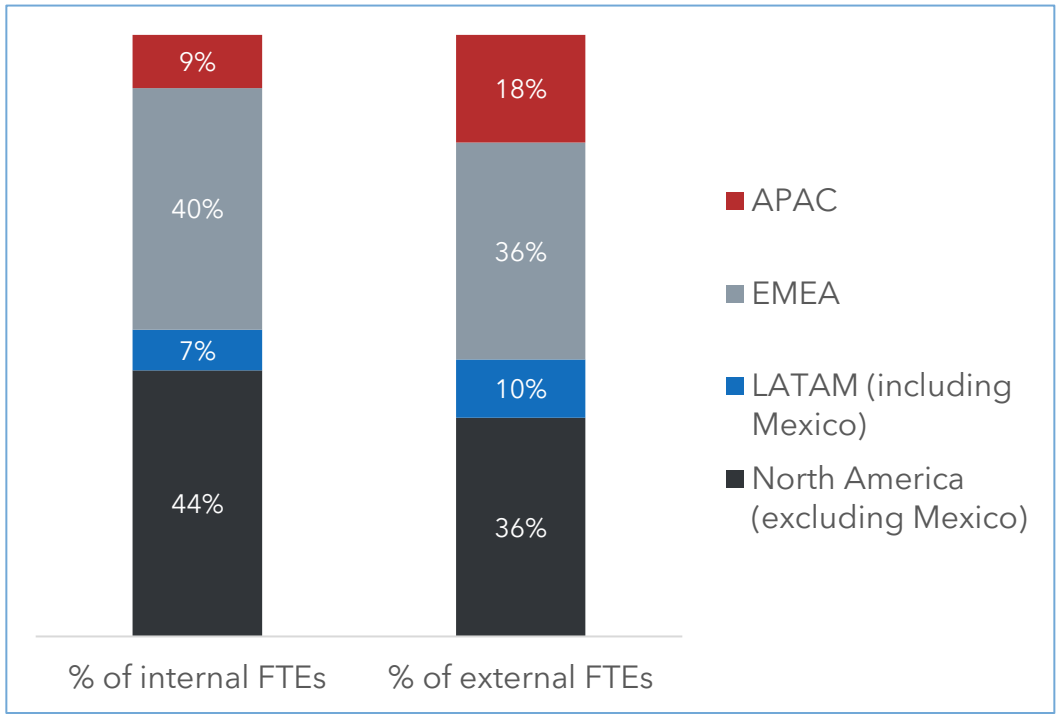
Key observations related to FTE distribution:

- **Balanced resource strategy**
  - In both revenue brackets, internal resources are prioritized for marketing activities, with enterprises generating between $500M and $5B allocating a slightly higher percentage of internal resources.
  - The allocation of FTEs indicates a strategic focus on leveraging internal capabilities while utilizing external resources to complement marketing efforts.
- **In-house marketing dominance**
  - Across all sectors, a higher percentage of marketing budget is allocated internally than to outsourced or external resources.
  - This suggests a preference for in-house marketing capabilities for strategic, high-impact activities, while external resources are primarily used to support marketing execution and provide specialized expertise or capacity.
- **Sectoral internal reliance**
  - The high-tech (SaaS) sector has the highest percentage of internal marketing FTEs at 63.52%, indicating a strong reliance on internal resources for marketing activities.
  - On the other hand, healthcare has the lowest percentage of internal marketing FTEs at 60.65%, showing a relatively higher dependence on outsourced or external resources.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Internal teams dominate in North America and EMEA, while external resources are more prevalent in APAC and LATAM



"An integrated framework balances global strategy with regional customization. Coordination between central marketing teams and regional partners ensures brand messages are adapted appropriately, balancing team sizes across regions."

– Global Marketing Director, a global medical technology conglomerate

Key observations related to multishore strategy:

- **Unified onshore-offshore alignment:** Strategic alignment across onshore and offshore teams remains challenging, but firms counter this by instituting joint planning sessions, regular reviews, and unified digital platforms that streamline workflows and reduce communication gaps.
- **Data-backed outsourcing strategy:** Outsourcing decisions are driven by workforce reviews and data-backed insights, teams analyze productivity, identify redundant processes, and apply lean methodologies or automation to streamline operations before outsourcing to fill targeted gaps.
- **Cross-cultural integration programs:** Companies are introducing cross-cultural integration programs and shared onboarding processes to address cultural and geographic differences in global teams. These foster mutual understanding, reinforce brand tone and messaging, and reduce inefficiencies in collaboration between onshore and offshore units.

Other key observations by regions:

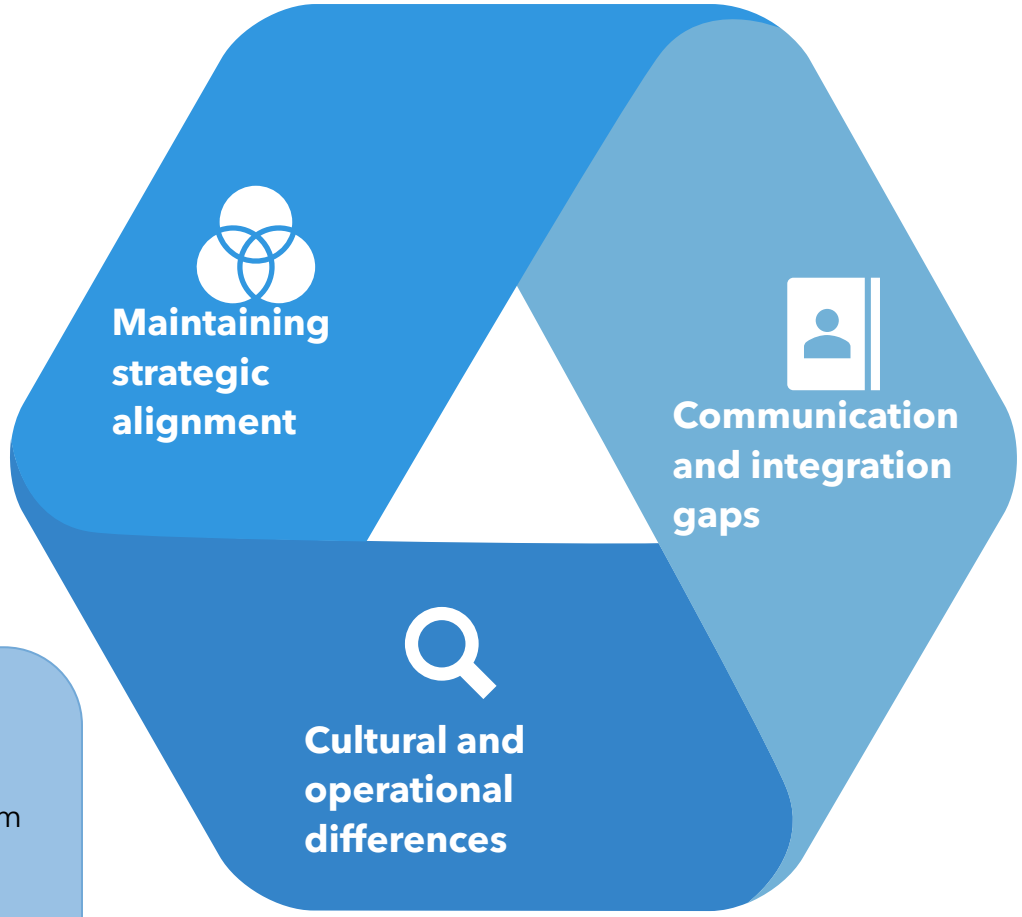
- Internal teams dominate in North America and EMEA, supporting the need for close control, brand consistency, and compliance with local regulations.
- In contrast, external resources are more prevalent in APAC and LATAM, underscoring the trend toward offshore and nearshore outsourcing to access specialized talent, increase agility, and optimize operational costs.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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The major challenges in onshore-offshore alignment span across communication, culture, integration, and strategic consistency

- Ensuring that both onshore and offshore teams fully understand and execute the overarching strategic objectives can be difficult.
- Misalignment on goals and priorities occasionally leads to fragmented efforts and diluted messaging.



- Significant differences in time zones can lead to slower issue resolution and misaligned expectations.
- There is a recurring concern about aligning different technology platforms and workflows.
- Integrating the onshore team's systems with those used offshore is challenging, often requiring additional coordination and standardization.

- Challenges arising from cultural differences, such as variations in work style, decision-making processes, and business etiquette, can complicate team integration.
- Differences in operational methodologies and processes between onshore and offshore teams sometimes result in inconsistencies in quality and project execution.

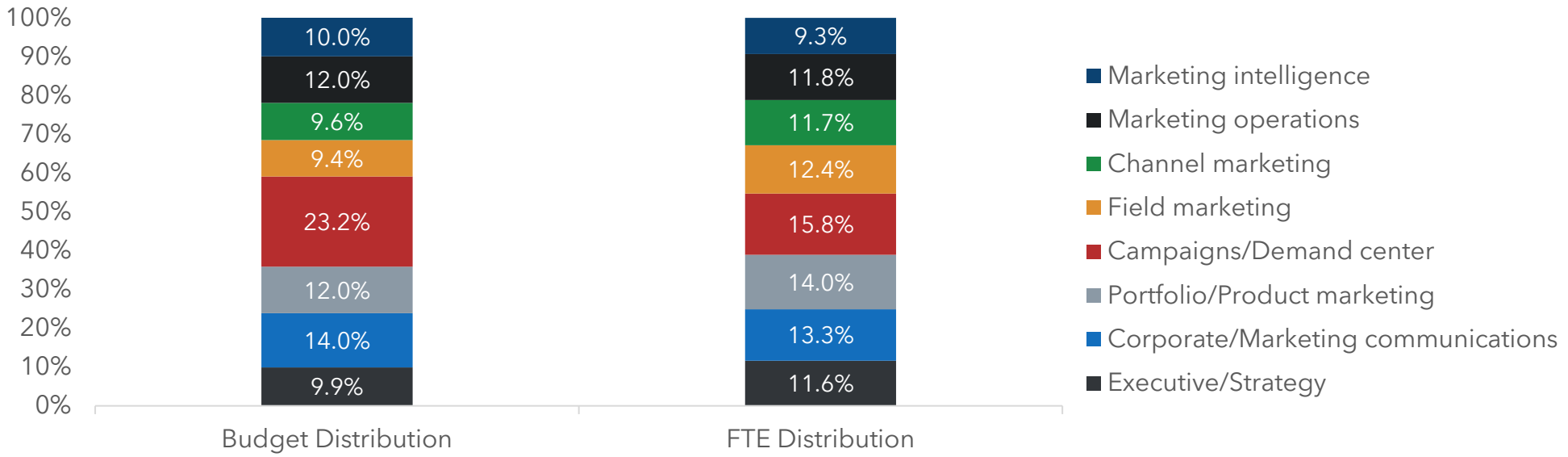
"Weekly, we come together to ensure cross-functional awareness and maintain brand uniformity across all service lines. This prevents messaging overlap and ensures campaigns do not cannibalize each other. We use a sophisticated algorithm to manage correct adjacencies and distancing." – Innovation and Marketing Officer, a university-affiliated hospital network

Source: Avasant B2B marketing study IDIs (n=11)

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Budget and resource allocation across functions are driven by targeted outsourcing and talent availability

Share of total marketing budget and FTEs across functions

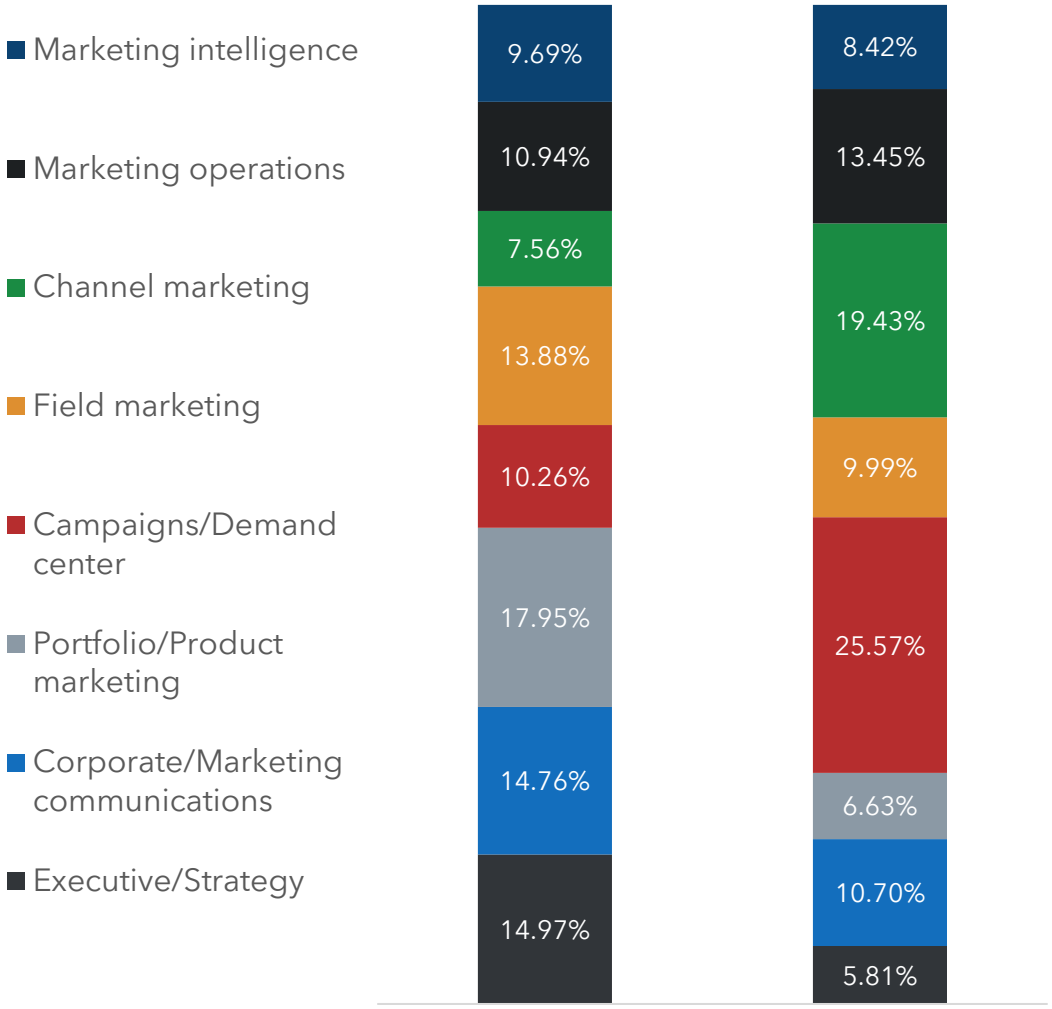


- Despite smaller budget allocations, channel and marketing operations play a critical role in driving customer retention and expanding the partner ecosystem. Outsourcing in this area is often leveraged to access agencies with joint go-to-market (GTM) expertise and to deliver personalized, regionally tailored programs that support long-term loyalty.
- As the largest recipient of both budget (23.2%) and FTE share (15.8%), the campaigns/demand center is pivotal for orchestrating multichannel campaigns that directly fuel lead generation and revenue growth. Outsourcing supports faster execution, advanced analytics integration, and the ability to scale campaigns across channels, enhancing agility and ROI.
- Field marketing, with 9.4% of the budget and 12.4% of FTEs, is focused on executing localized campaigns, events, and direct customer engagement initiatives. Outsourcing in this function provides access to regional expertise, supports cultural and market-specific adaptation, and enhances responsiveness to local market dynamics.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)
Percentages may not add up to 100% due to rounding off.

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Enterprises are leveraging outsourcing as a strategic driver for value creation beyond cost savings



Key workforce structure planning strategies:

- **Strategic FTE allocation across functions**
  - Internal FTEs are concentrated in high-value areas such as executive/strategy and corporate/marketing communications, supporting alignment and brand consistency.
  - External FTEs are primarily allocated to campaigns/demand center (25.57%) and channel marketing (19.43%), where speed, scale, and execution efficiency are critical.
- **Optimizing with a balanced model**
  - Companies retain strategic functions, such as portfolio marketing and executive alignment, in-house while outsourcing execution-heavy roles to scale demand generation without overstretching teams.
  - This hybrid model boosts efficiency by combining internal strategic depth with external executional agility.
- **Execution and regional compliance drive outsourcing**
  - Campaign execution is the most outsourced function because of its need for quick turnarounds and measurable ROI.
  - Brand storytelling and creative support are selectively outsourced, while compliance-driven marketing, especially because of evolving data privacy laws, increasingly relies on specialized partners.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)
Percentages may not add up to 100% due to rounding off.

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Major outsourced subfunctions

Outsourcing maturity levels: 0%–25%: Low | 25%–50%: Medium | 50%–75%: High | More than 75%: Very high

B2B marketing functions							
Executive/ Strategy	**Corporate/ Marketing communications**	**Product/ Portfolio marketing**	**Campaigns/ Demand center**	**Field marketing**	**Channel marketing**	**Marketing operations**	**Marketing intelligence**
Brand strategy	Brand strategy and messaging	Customer segmentation	Campaign design and strategy	Event strategy and execution	Channel selection	Web management and optimization	Market research and competitive analysis
User experience strategy	AR/PR strategy and execution	Competitive and market intelligence	Campaign execution	ABX campaigns planning, designing, and execution	Multichannel marketing	Commerce cataloguing and curation	Customer and account intelligence
GTM strategy	Content marketing and digital communications	Messaging and program development	Campaign optimization and support	Performance measurement and optimization	Channel optimization	Sales enablement	Reporting and analytics
ABX strategy	Internal and employee communications	GTM strategy and execution	Campaign performance evaluation	Stakeholder relationship management	Programmatic ad buying	Loyalty program execution	Sales and marketing alignment
Budgeting and resource allocation	Creative production	Sales and customer success enablement	Content localization and optimization		Media measurement	Lead management	Competitive Intelligence and benchmarking
Customer retention strategy	Marketing mix strategy				Channel management	Marketing spend effectiveness	Business monitoring
	Content atomization					Loyalty strategy	
						Social/Mobile command center	

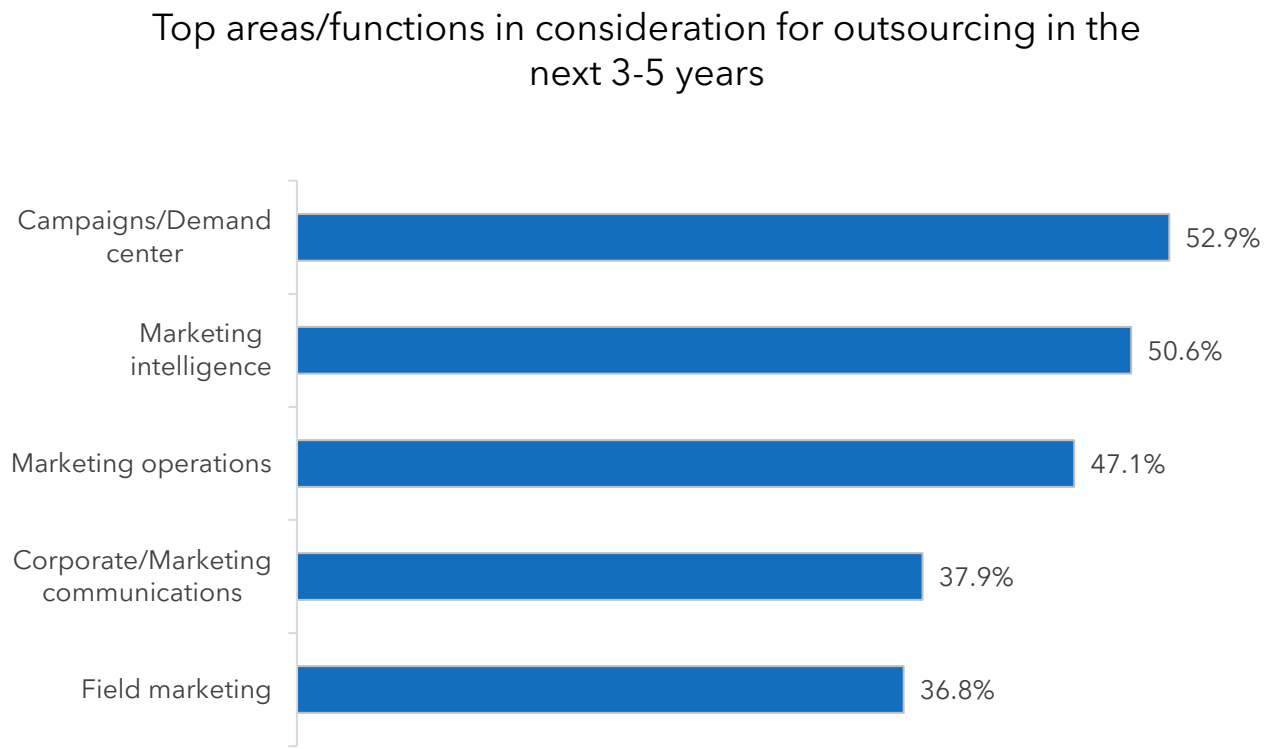
Source: Avasant B2B marketing study survey (n=87)

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4. Evolution of Outsourcing Models

Enterprises are increasingly looking to outsource to scale campaigns, marketing intelligence, and marketing operations

Trends for future outsourcing areas



Key observations:

The marketing functions that are focus areas for outsourcing:

- **Campaigns/Demand center**: Cost efficiency, breaking marketing tasks into targeted microservices, data-driven insights, social media selling, and integrated workflows
- **Market intelligence**: Continuous market scanning, AI-assisted decision-making, and hyper-relevant content
- **Marketing operations**: Campaign management automation and accurate ROI tracking, customer sentiment analysis, and ad spend optimization
- **Corporate/Marketing communications**: Integration with product development, hyper-segmentation, AI-driven ad optimization, and virtual testing of marketing strategies
- **Field marketing**: Real-time market intelligence and analytics, visual storytelling, immersive experiences, social media integration, and post-event engagement optimization

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Core marketing functions will remain in-house for alignment and oversight to preserve strategic control



Brand strategy

Companies still believe that their unique identity and market positioning need deep internal alignment.



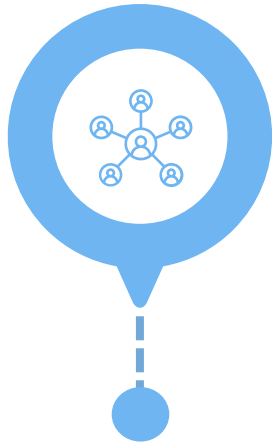
GTM strategy

It requires intimate knowledge of products, target markets, and business objectives.



Budgeting and resource allocation

It involves strategic decisions on spend and priorities that directly impact profitability and growth.



Customer retention strategy

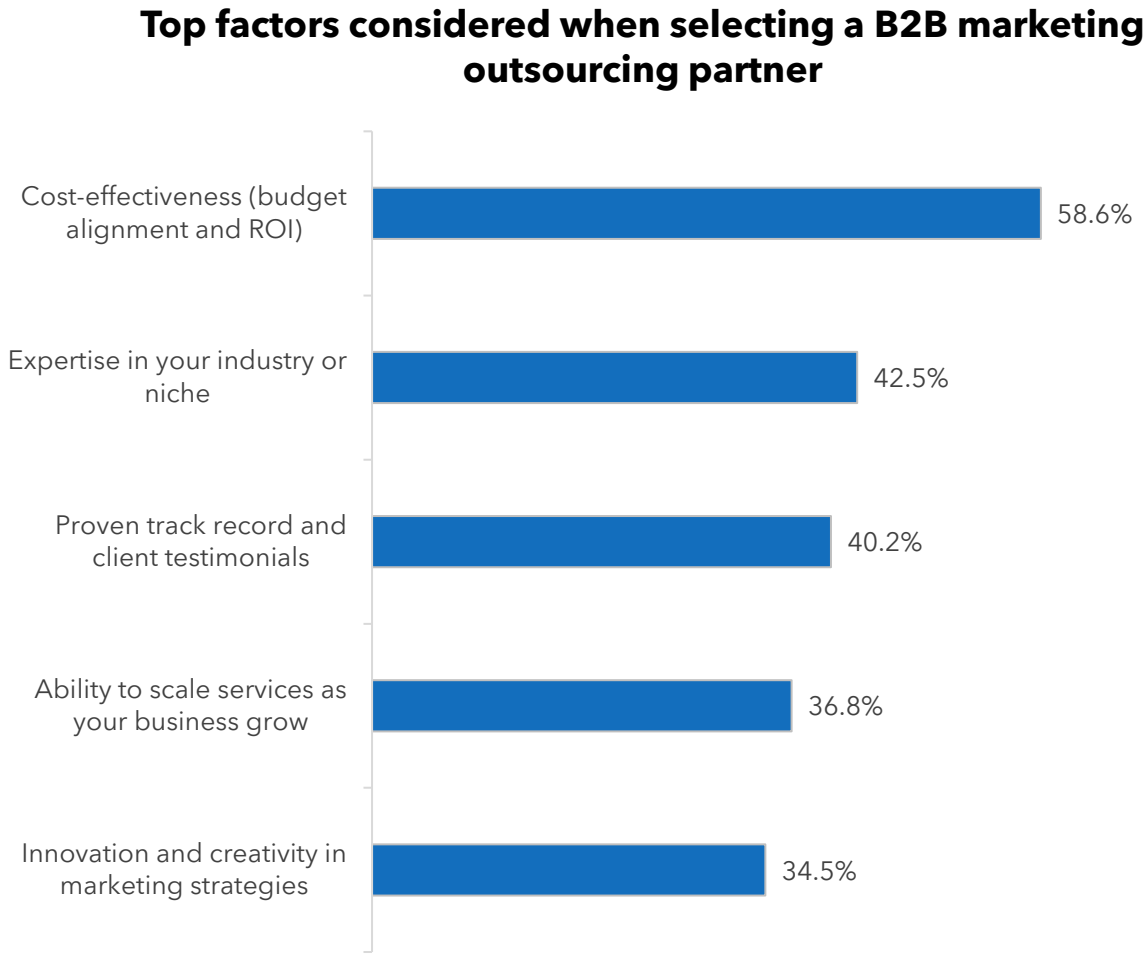
It demands personalized engagement and a deep understanding of customer relationships.

"Maintaining intellectual property and strategic alignment often means keeping functions like research and development in-house. This approach helps preserve our competitive edge and company culture."

– Regional Head of Developer Marketing, EMEA , a cloud-based data warehousing and analytics provider

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

Traditional performance metrics are no longer relevant, and enterprises are evaluating outsourcing marketing functions on business outcomes



Key observations:

- **Success factors:**
  - Strategic partnerships with agencies offer unique, technology-driven solutions.
  - Flexible pricing models align cost with performance, ensuring investments are directly tied to measurable outcomes.
- **Performance measurement**:
  - Outsourced models often come with performance-based metrics, making it easier for organizations to measure success and adjust strategies accordingly.
- **KPIs tracked for the marketing team:**
  - The emphasis is on metrics that could be directly linked to customer behavior and revenue generation.
  - ROI, lead conversion rate, customer lifetime value (CLV), engagement rate, and time-to-market metrics directly correlate with revenue growth and customer acquisition, two central pillars of marketing success.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Major marketing outsourcing model types

Models	How it works	Typical use cases
Traditional retainer-based agencies	• Provide a long-term contract relationship with a fixed monthly fee • Offer time, talent, and resources	• Clients with established marketing budgets • Need for consistent, ongoing marketing efforts • Requirement for strategic growth over time
Project-based agencies	• Focus on specific, well-defined deliverables • Charge a fixed fee based on project scope and complexity • Provide clear beginning and end dates • Lay down a detailed scope of work upfront	• One-off marketing initiatives • Short-term marketing support • Need for specialists for a specific project • Testing new marketing channels before commitment
Independent contractors	• Provide support as self-employed professionals • Charge hourly or daily • Enable a direct relationship without agency overhead • Work as an extension of your team, but not as employees	• Testing marketing tactics before hiring • Filling specific skill gaps in the team • Requirement for fast results, as hiring might take longer • Content creation, professional services, and technical projects
Freelancer platforms	• Serve as online marketplaces connecting clients with freelancers • Offer services with transparent pricing • Handle payments, contracts, and dispute resolution	• Small, discrete marketing tasks with quick turnaround • Low-budget marketing initiatives • Testing freelancers for fit • Access to a global talent pool
Managed services/Next-generation subscription services	• Offer marketing-as-a-service subscription model • Charge a flexible monthly fee for the services package • Address all marketing needs under one subscription	• Clients seeking alternatives to traditional agencies • Need for comprehensive marketing without an in-house team • Requirement for agility and scalability

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

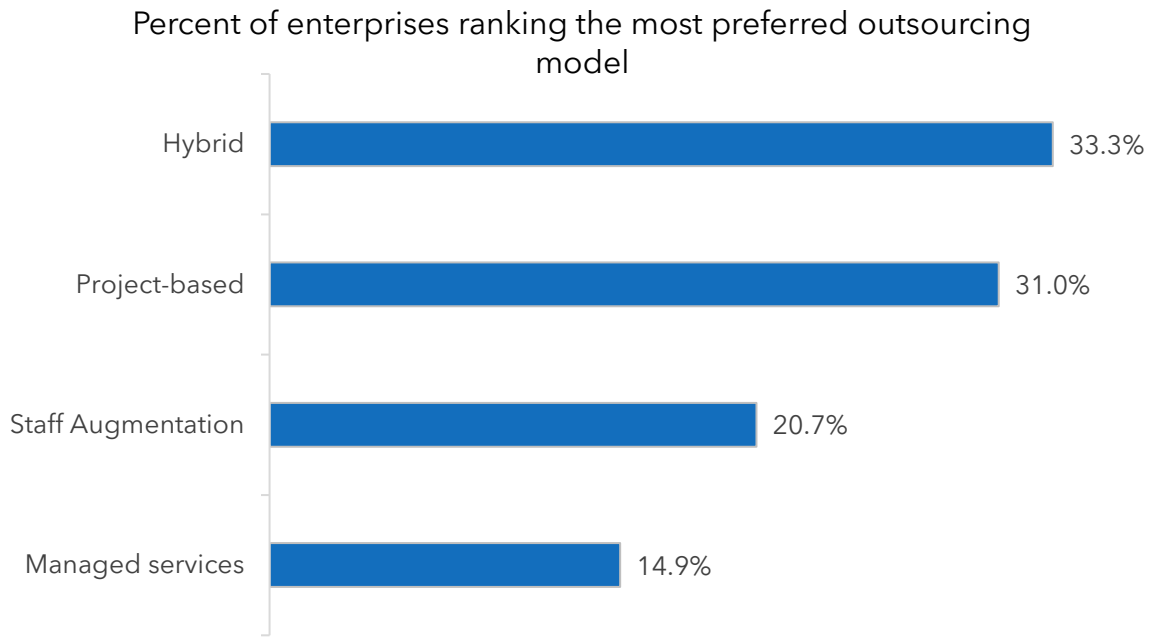
Major marketing outsourcing model types: Pros and cons

Models	Key pros	Key cons
Traditional retainer-based agencies	• Continuity and long-term planning • Access to the full agency team with diverse expertise • Continuous campaign improvement	• Higher fixed monthly costs • Less flexibility to adjust the scope quickly • Potential for underutilized resources in slow periods • Significant financial commitment required • A-team sold and delivery by less experienced B or C-team
Project-based agencies	• More flexible with turnaround times • Clear deliverables and transparent costs • No long-term commitment required • Ability to select agencies based on project needs • Can be more responsive to urgent needs	• Potential for scope creep and additional costs • Limited strategic oversight • Multiple projects can lead to disjointed marketing • Onboarding time for the new project • A-team sold and delivery by less experienced B or C-team
Independent contractors	• Specialized expertise in specific areas • Cost-effective compared to agencies or full-time hires • Flexible engagement and quick to implement • Fresh perspectives from experiences	• Limited availability due to other clients • Lack of long-term commitment • Communication challenges • Limited integration with internal teams • Management overhead
Freelancer platforms	• Extremely fast hiring process • Wide range of price points and services • No commitment beyond projects • Protection through platform guarantees • Direct control over hiring decisions	• Variable quality of work requires careful vetting • Management overhead across multiple freelancers • Platform fees increase actual costs • Potential communication challenges
Managed services/Next-generation subscription services	• Quick implementation • Access to diverse specialists under one contract • More personalized than agencies, more comprehensive than freelancers	• Potential loss of control over maintaining brand standards • Dependency on an external provider • Possible data privacy/security concerns • Longer onboarding period and less established model

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

Hybrid and project-based outsourcing models enable scalable, agile, and cost-effective marketing execution

The flexible, outcome-driven approaches balance in-house oversight with specialized external support in an AI-enhanced environment.



"Our goal is to establish a hybrid outsourcing model that aligns our internal strategies with the expertise of external partners. By focusing on our core strategies and leveraging outsourcing for execution, we can adapt to the diverse markets in different regions."

– Global Marketing Director, a global medical technology conglomerate

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)
Percentages may not add up to 100% due to rounding off.

Key observations related to different outsourcing engagement models:

- **Hybrid outsourcing model:** Central teams define strategy while local partners customize execution, blending long-term partnerships with project-based engagements for scalable, cost-effective resourcing.
- **Project-based engagements:** External partners support specific initiatives—content development, campaign execution, website design/development, and market research—unlocking expertise on demand.
- **Staff augmentation:** Outsourcing targeted roles, such as content production and analytics, drives faster turnaround times and reduced operational costs.
- **Enabling technologies and workflows:** Cloud-based project management platforms and flexible work arrangements facilitate seamless, asynchronous collaboration across hybrid teams and time zones.
- **Avoiding rigid models:** Fully managed or inflexible outsourcing setups are often deemed too slow for today's fast-moving marketing environment.

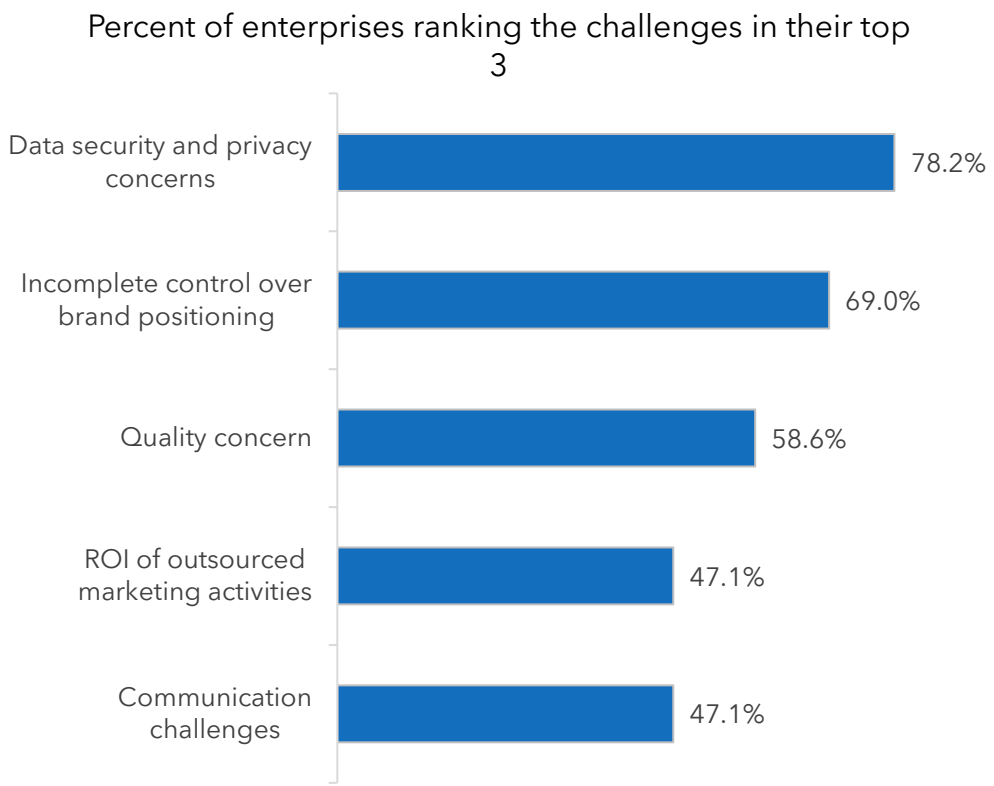
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Marketing outsourcing maturity framework

Level	Core focus	Key characteristics and capabilities	Typical pain points and risks
5. Transformer	Innovation and cocreation	• Outsourcing serves as a core enabler of marketing innovation and agility • Co-innovation with partners through labs with strategic partners • Data-driven, outcome-based contracts with the ability to scale and localize • Continuous upskilling and talent planning with agile and modular service models • Predictive analytics and AI-driven personalization	• Maintaining competitive differentiation • Managing complex, multiregional ecosystems • Balancing control with innovation • Sustaining partner synergies
4. Accelerator	Analytics-driven performance and efficiency	• Strategic partnerships with key providers • Advanced use of AI, automation, and analytics with advanced reporting (ROI, LTV, and CAC by campaign) and partial automation • Continuous improvement loops with integrated workflows and shared KPIs	• Balancing innovation with compliance • Scaling best practices globally • Analytics-skill gaps • Dependence on external tech expertise
3. Striver	Integrated delivery and governance	• Formalized outsourcing strategy with dedicated outsourcing CoE or PMO • Hybrid in-house/outsourced model • Standardized processes and KPIs • Regular performance reviews and basic dashboards	• Change management challenges • Need for better data integration due to siloed knowledge and data across functions
2. Follower	Process standardization	• Outsourcing is more frequent with some preferred vendors • Basic SLAs and informal governance (SLAs, RACI) with some process documentation • Formal vendor selection process with centralized intake for incoming requests	• Vendor management challenges with onboarding delays • Inconsistent results due to process gaps across regions • Limited integration with in-house teams
1. Beginner	Tactical cost relief "fire-fighting" tasks	• Outsourcing is sporadic, project-based, and reactive for one-off, low-complexity campaigns • No formal process or governance or SLA tracking • Decisions driven by cost or urgent need • Minimal integration with in-house teams	• Lack of consistency • Poor quality control and visibility into spend and outcomes • Limited scalability

Source: Avasant Research and IDIs (n=11)

Key outsourcing challenges include ensuring seamless data integration, accurate ROI measurement, and retaining top talent



Key observations:

- **Global coordination complexity:** It involves coordinating across different time zones, ensuring that external teams fully understand internal systems, and maintaining consistent data quality.
- **Communication consistency gaps:** Inconsistent communication and misaligned expectations can lead to delays or suboptimal deliverables.
- **Regulatory compliance vulnerability:** Emerging trends often involve updated regulatory frameworks. Failure to adopt new technologies may leave organizations vulnerable to noncompliance issues, especially regarding data privacy and security.
- **Legacy integration friction:** Integration between the partner's systems and the company's legacy technology platforms sometimes creates friction, impacting overall efficiency.
- **Cultural and strategic alignment challenges:** While technical capabilities and quantitative metrics are easier to assess, measuring cultural fit and strategic alignment often proves challenging. Subjective factors, such as the partner's adaptability and creativity, can be difficult to benchmark objectively.
- **Enhanced quality oversight:** Ensuring that the partner's processes meet the company's quality standards requires additional oversight and sometimes leads to extended evaluation periods.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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5. Strategic Recommendations

Recommendations for enterprises



Transition from tactical to strategic performance metrics

Enterprises must move beyond measuring campaign-level KPIs (for instance, click-through rates) to tracking metrics that demonstrate marketing's direct impact on business growth, such as customer lifetime value (CLV) and revenue contribution.



Embed AI for agent augmentation, not replacement

Companies should leverage AI for hyper-personalization and predictive analytics, but they must retain human oversight to maintain brand authenticity and emotional resonance.



Prioritize hyper-personalization with ethical data use

B2B buyers now expect B2C-like personalization, but enterprises struggle with fragmented data silos. In regulated industries (for instance, healthcare and finance), AI-driven segmentation must be balanced with compliance.



Establish cross-functional ai governance committees

As AI adoption accelerates, enterprises risk ethical missteps and regulatory noncompliance.



Outsource for innovation, not just cost savings

Leading enterprises now treat outsourcing as a strategic lever to access AI expertise and fill talent gaps.

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

Recommendations for enterprises considering outsourcing

Define clear objectives and success metrics before outsourcing

- Articulate specific goals, timelines, and KPIs for every outsourcing engagement to ensure alignment and accountability from the outset.
- Use structured RFPs and business cases to vet potential partners against these criteria, reducing the risk of misaligned expectations or underperformance.

Adopt a hybrid outsourcing model for strategic flexibility

- Retain strategic planning and core customer insights in-house while outsourcing specialized or execution-heavy tasks to external experts.
- Regularly review which functions should be kept internal rather than outsourced, adjusting as your organization matures and market needs evolve.

Prioritize partner selection beyond cost

- Evaluate potential providers on quality, technological expertise, cultural fit, and risk management, not just price.
- Conduct thorough due diligence, including reference checks, compliance audits, and pilot projects, before committing to long-term contracts.



Invest in continuous learning and internal capability building

- Establish ongoing training programs, AI governance committees, and structured learning frameworks to keep your team ahead of rapid technological change.
- Encourage cross-functional collaboration and knowledge sharing to maximize the value of both internal and external resources.

Ensure robust governance and performance measurement

- Implement regular alignment meetings, clear documentation, and joint performance reviews to manage outsourced relationships proactively.
- Track both tactical and strategic KPIs, such as ROI, customer engagement, and speed to market, to demonstrate the business impact of outsourcing and drive continuous improvement.

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

High-level strategic operating model transformation road map

	"Where are we today?"	*"Governance and standardization"*	*"Shared services and tech"*	*"Analytics and efficiency"*	*"Cocreation and AI"*
	1. Assess, align, and mobilize	2. Foundation building	3. Integration and standardization	4. Optimization and innovation	5. Continuous leadership
Timeline	0–2 months	2–4 months	4–6 months	6–12 months	12+ months
Practical steps	• Conduct gap analysis • Engage leadership workshops • Map current versus desired state	• Develop an outsourcing playbook • Pilot 1–2 core functions with select vendors • Define KPIs and reporting cadence	• Implement integrated workflows • Onboard vendors to shared platforms • Launch ongoing training	• Codevelop innovation pilots • Expand data analytics use • Enable continuous improvement cycles through workshops	• Establish joint innovation labs • Conduct regular talent and skills assessments • Refresh strategy annually
Key milestones	• Baseline maturity assessment across BUs • Executive buy-in and budget allocation • Initial outsourcing of inventory • Establish PMO/CoE charter	• Formalized outsourcing policy • Vendor selection criteria with onboarding framework • Initial SLAs and governance with SLA templates and RACI matrix in place	• Hybrid in-house/outsourced operations and expansion to additional functions • Standardized processes and platforms • Regular performance reviews with integrated analytics dashboards	• Establish strategic partnerships with outcome-based contracts • AI/automation adoption for routine tasks • Advanced analytics rollout	• Co-innovation labs with key partners • Global/local best practice scaling • Talent upskilling programs • AI-driven personalization at scale
Resource requirements	• Cross-functional assessment team • External benchmarking support and maturity assessment • PMO	• Vendor management resources • Legal and procurement support • Process leads	• Change management lead • Training budget • IT integration support with a data analyst and a MarTech integration specialist	• Data analytics team • Innovation budget • Joint steering committees • RPA/automation engineer	• Dedicated innovation teams and budget • L&D investment • Dedicated AI strategist
Success metrics examples	• Percentage of functions mapped • Leadership alignment score • Assessment completion rate	• Number of SLAs implemented • Vendor NPS • Time-to-onboard • SLA compliance	• Percentage of workflows standardized • Campaign cycle time • Cost	• Percentage of campaigns using AI/automation • Cost and marketing ROI • Manual effort	• Percentage of revenue from new digital channels • Employee upskilling rates • Brand NPS

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

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Recommendations for service providers



Invest in advanced AI and data-driven capabilities

- Continuously upgrade AI, automation, and analytics offerings to meet client demands for hyper-personalization and campaign efficiency.
- Demonstrate expertise in integrating AI tools for content creation, predictive analytics, and campaign optimization, as clients increasingly seek partners who can deliver measurable business outcomes.



Prioritize regulatory compliance and data security

- Develop deep knowledge of sector-specific regulations (for instance, healthcare and finance) and ensure robust data protection protocols to win trust and secure contracts, especially in highly regulated industries.
- Proactively address compliance in proposals and contracts, offering clear audit trails and certifications to differentiate from less mature competitors.



Cultivate regional and cultural expertise

- Build teams or partnerships with strong local market knowledge to address clients' needs for nuanced, region-specific campaigns and regulatory navigation (for instance, language, cultural norms, and local laws).
- Highlight successful case studies where local expertise led to faster market penetration or improved campaign results, especially in complex regions such as China or the EU.



Foster transparent communication and agile collaboration

- Establish structured onboarding, regular alignment meetings, and clear documentation to ensure seamless integration with client teams, reducing misalignment and execution risk.
- Use a mix of synchronous and asynchronous communication tools and provide dedicated liaisons to maintain alignment across time zones and geographies.



Demonstrate long-term innovation and a partnership mindset

- Move beyond transactional project delivery to offer strategic input, co-innovation, and continuous improvement, positioning the company as a true partner in clients' growth journeys.
- Invest in ongoing training and upskilling of your teams and share innovation road maps with clients to build confidence in your ability to scale and adapt based on their needs.

Source: Avasant B2B marketing study IDIs (n=11); Avasant Research

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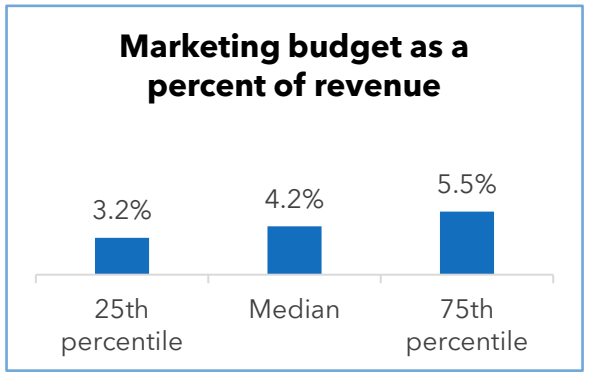
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Appendix

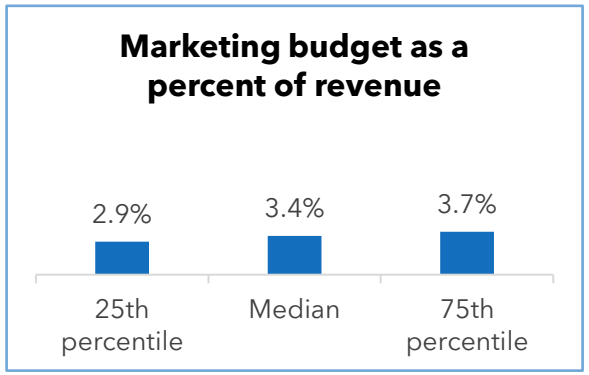
Market size and growth projections across industries

Financial services



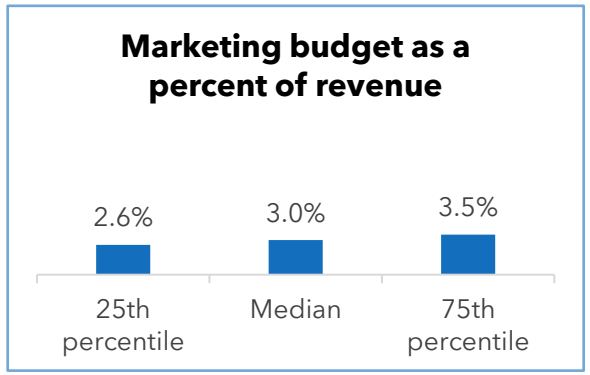
Financial services maintain moderate marketing budgets, focusing on customer retention, compliance, and personalized experiences through AI analytics.

Healthcare



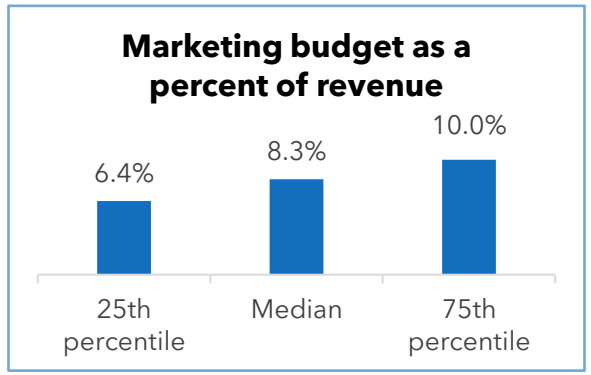
Healthcare organizations typically allocate a smaller percentage of revenue to marketing due to reliance on referrals, word-of-mouth, and reputation management rather than aggressive marketing campaigns.

Manufacturing



Manufacturing firms prioritize B2B strategies such as trade shows and partnerships, which require less budget compared to consumer-focused industries.

High-tech (SaaS)



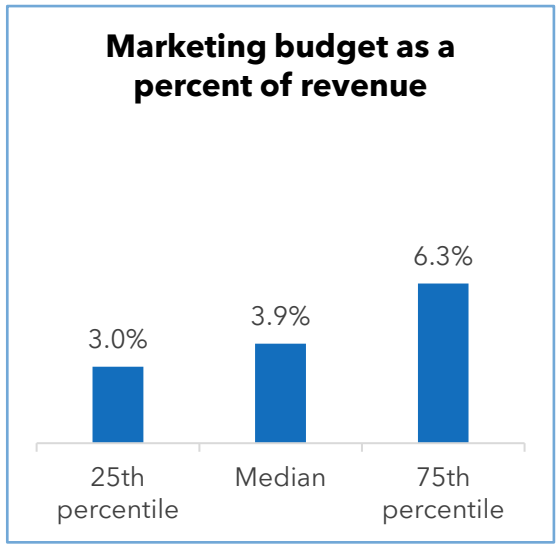
High-tech (SaaS) leads in marketing spend at 8.3% (median) of revenue, focusing on branding in fast-moving markets. Budgets are set to rise 7.5% next year.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

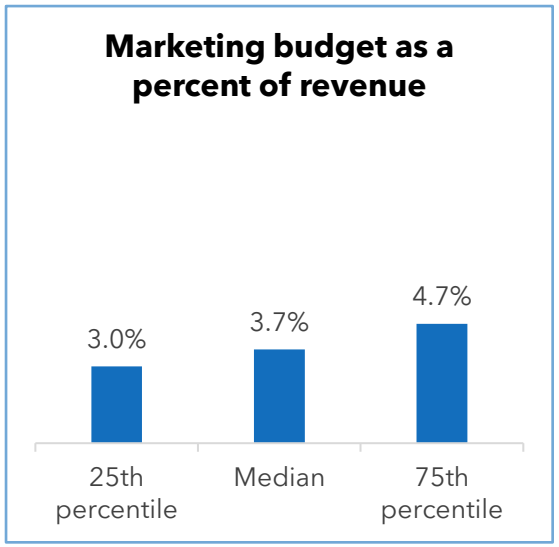
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Market size and growth projections across enterprise HQ and revenue

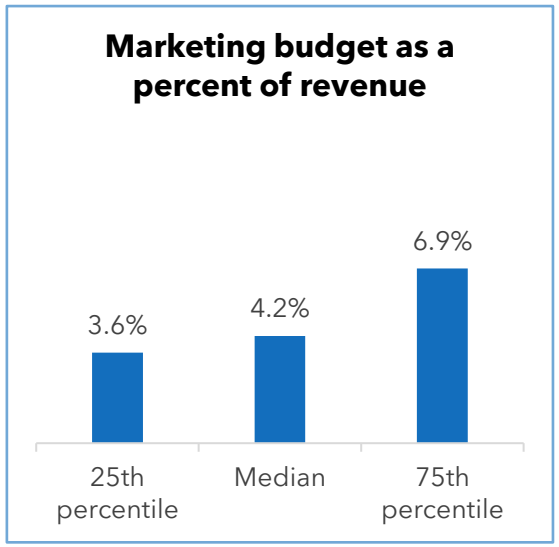
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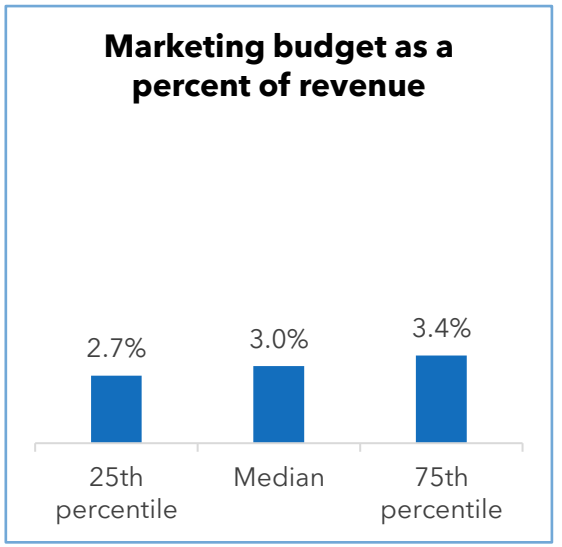
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$500M–$5B



More than $5B



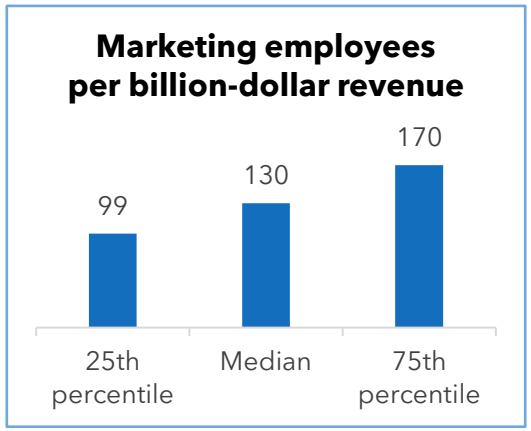
Enterprises with $500M to $5B in revenue expect their marketing budgets to grow by 5%–10% next year, with the top-quartile firms already allocating up to 6.9% of revenue to marketing, that is nearly double the allocation of the largest enterprises (more than $5B), who allocate just 3.4% at the 75th percentile. Mid-market leaders are out-investing their larger peers by betting aggressively on marketing to fuel outsized growth in the year ahead.

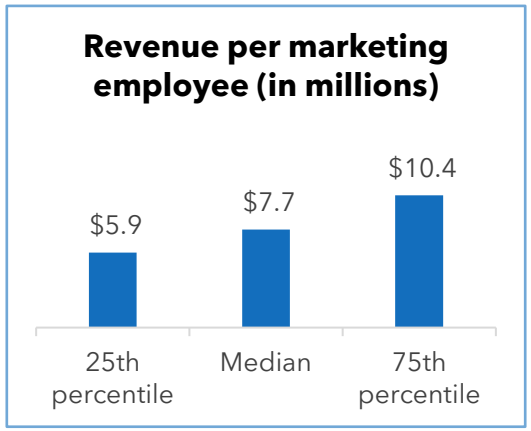
Source: Avasant B2B marketing study survey (n=87)

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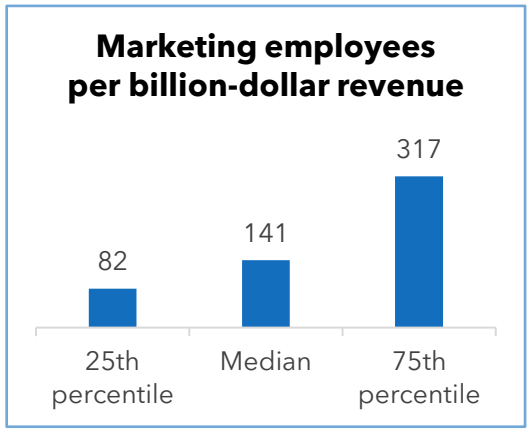
Marketing employee and revenue metrics across industries

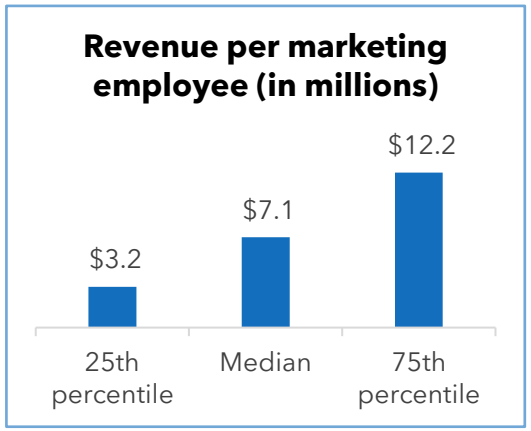
Financial services



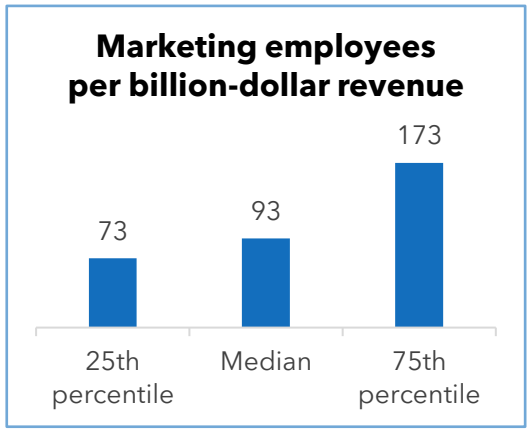


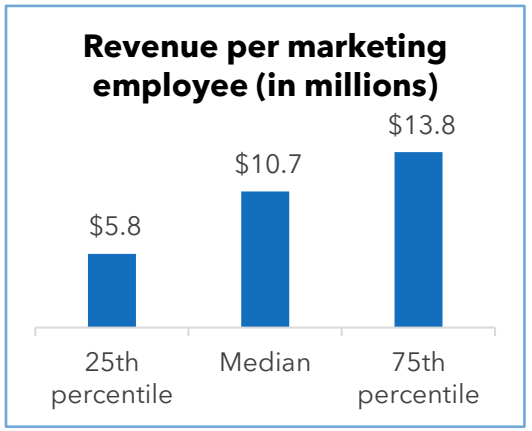
Healthcare



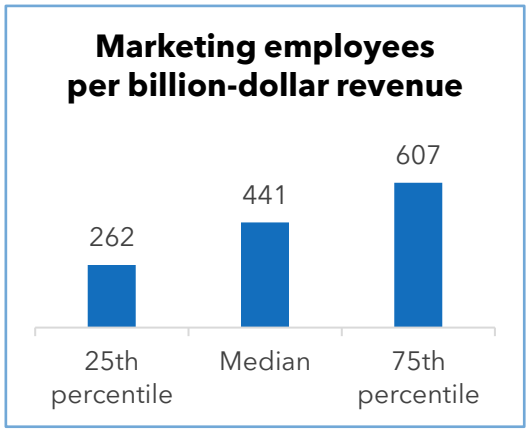


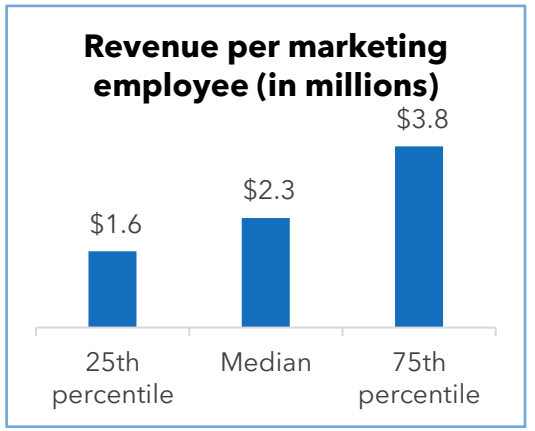
Manufacturing





High-tech (SaaS)





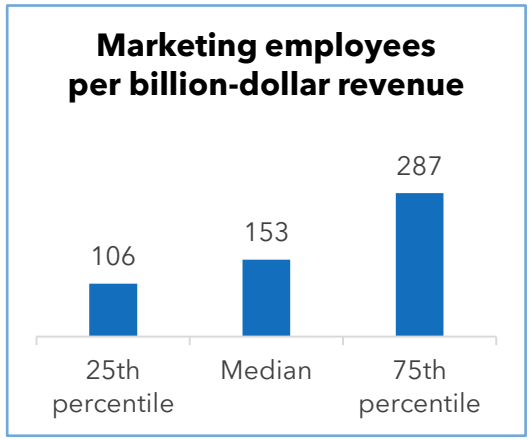
Manufacturing companies achieve a median revenue per marketing employee of $10.7M, more than four times higher than the High-tech (SaaS) sector's median of $2.3M per marketing employee. Leaders are driving radical productivity, expecting every marketer to deliver enterprise-scale impact and redefining marketing as a high-leverage growth engine and not just a cost center.

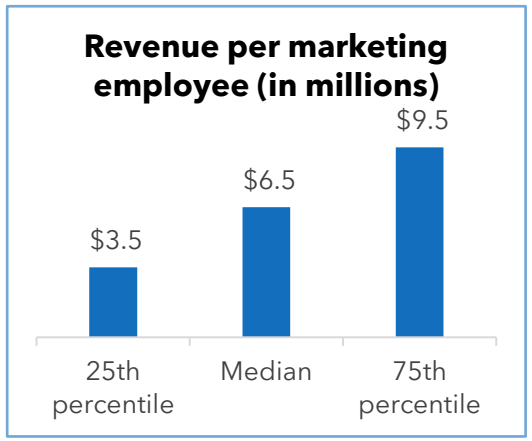
Source: Avasant B2B marketing study survey (n=87)

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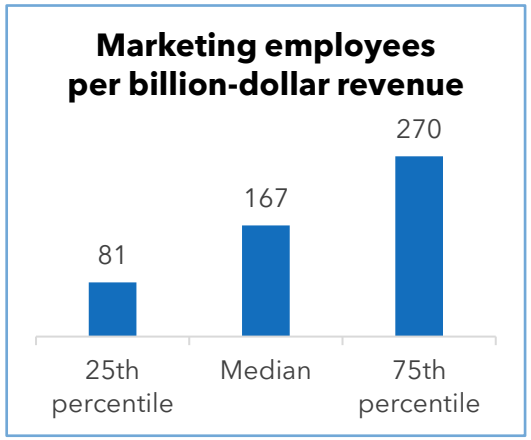
Marketing employee and revenue metrics across enterprise HQ and revenue

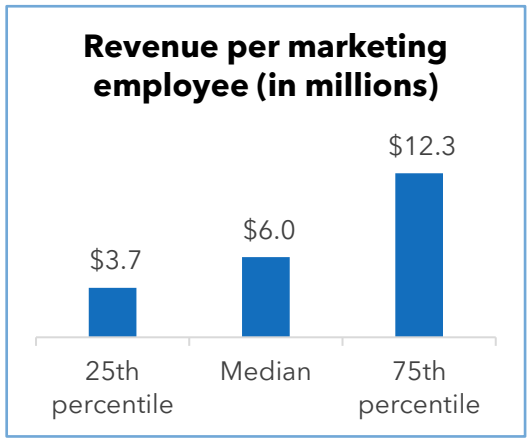
US



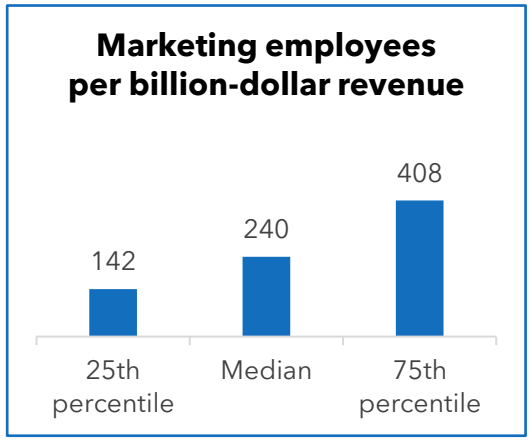


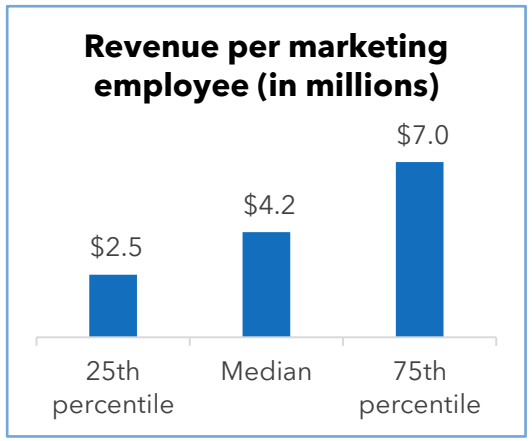
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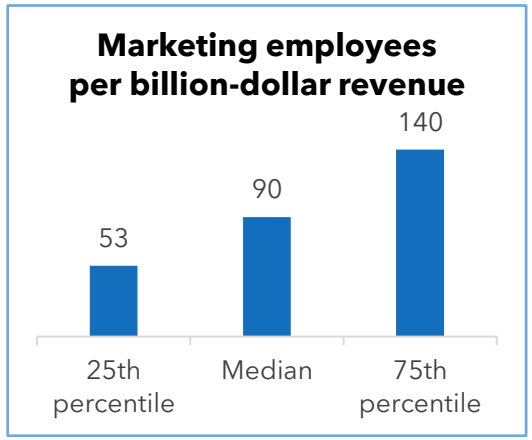


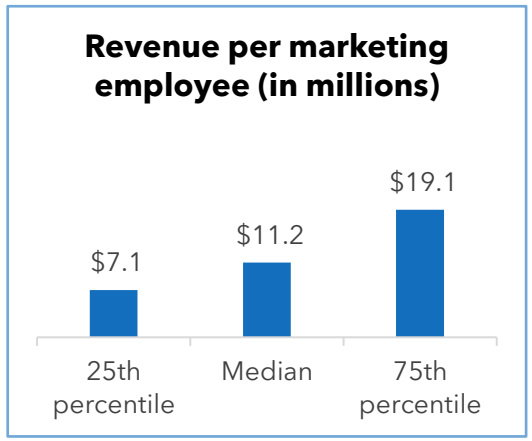
$500M–$5B





More than $5B





Among enterprises with more than $5B in revenue, each marketing employee supports $11.2M in revenue at the median, nearly triple the median for smaller companies and the highest efficiency across all segments in the data. Leaders are driving unprecedented productivity, expecting every marketing hire to deliver enterprise-level impact and treating marketing as a high-leverage growth engine and not just a cost center.

Source: Avasant B2B marketing study survey (n=87)

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Budget allocation and spending across spend categories

Marketing budget split across categories	Financial services	Healthcare	Manufacturing	High-tech (SaaS)
Personnel	53.4%	62.1%	52.5%	58.0%
Nonpersonnel/Program	28.6%	18.0%	25.0%	22.4%
Technology	18.0%	19.9%	22.5%	19.5%
Total	100%	100%	100%	100%

Marketing budget split across categories	US headquartered	EMEA headquartered	Enterprise revenue ($500M–$5B)	Enterprise revenue (More than $5B)
Personnel	57.6%	53.3%	52.2%	56.1%
Nonpersonnel/ Program	22.0%	26.9%	25.5%	23.8%
Technology	20.4%	19.8%	22.3%	20.0%
Total	100%	100%	100%	100%

Manufacturing companies allocate 22.5% of their marketing budget to technology, the highest technology spending proportion among all industries in the table. Leaders are making bold tech investments, outspending every other sector to leapfrog into a data-driven, AI-powered future.

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Marketing budget and FTE distribution across industries and other categories

Geographies	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution
North America (excluding Mexico)	40.6%	34.7%	73.1%	46.8%	44.7%	41.8%	58.6%	48.7%
LATAM (including Mexico)	5.6%	7.9%	8.8%	6.6%	5.9%	7.9%	7.1%	9.2%
EMEA	45.5%	44.8%	16.9%	41.7%	39.7%	36.0%	27.8%	29.4%
APAC	8.3%	12.7%	1.2%	5.0%	9.7%	14.3%	6.5%	12.7%
Total	100%	100%	100%	100%	100%	100%	100%	100%

- In industries such as healthcare, outsourcing partners must navigate strict compliance rules and regional nuances, especially in markets such as China, where cultural and policy knowledge is essential.
- Factors such as the need for deep local market insights, regulatory expertise (especially in healthcare and financial services), and a focus on omnichannel engagement are central to shaping outsourcing decisions.
- Factors such as regional regulatory differences, reimbursement models, and economic pressures (such as inflation and supply chain disruptions) shape the narrative.

Geographies	US headquartered		EMEA headquartered		Enterprise revenue ($500M–$5B)		Enterprise revenue (More than $5B)	
	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution
North America (excluding Mexico)	70.6%	61.9%	24.1%	21.2%	44.1%	38.3%	53.0%	41.7%
LATAM (including Mexico)	7.3%	7.6%	5.7%	8.2%	5.2%	9.1%	6.8%	7.7%
EMEA	15.9%	17.5%	62.8%	59.0%	44.6%	42.1%	33.5%	38.0%
APAC	6.1%	12.9%	7.4%	11.7%	6.1%	10.4%	6.7%	12.6%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Marketing budget and FTE distribution across functions by industry

Marketing Functions	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution
Executive/Strategy	11.0%	12.9%	9.9%	11.1%	8.4%	10.3%	11.5%	11.9%
Corporate/Marketing communications	15.6%	15.3%	13.0%	16.4%	13.2%	9.7%	14.0%	15.0%
Portfolio/Product marketing	12.1%	13.4%	11.5%	11.7%	12.4%	15.2%	11.4%	11.6%
Campaigns/Demand center	23.8%	14.2%	19.7%	15.1%	26.0%	18.0%	21.4%	16.2%
Field marketing	7.8%	11.8%	9.4%	13.4%	10.7%	13.1%	10.0%	11.0%
Channel marketing	8.8%	11.4%	10.1%	12.4%	10.0%	11.9%	10.1%	13.7%
Marketing operations	11.3%	10.7%	15.9%	12.9%	9.9%	12.8%	10.2%	11.4%
Marketing intelligence	9.6%	10.4%	10.5%	7.1%	9.5%	9.0%	11.5%	9.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

In manufacturing, over a quarter of the total marketing budget is allocated to campaigns/demand center, the highest budget share for any marketing function across all industries in the table. Leaders are concentrating resources on demand generation, making campaigns/demand center a strategic engine for measurable business impact in today's results-driven market.

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Marketing budget and FTE distribution across functions by enterprise HQ location and revenue

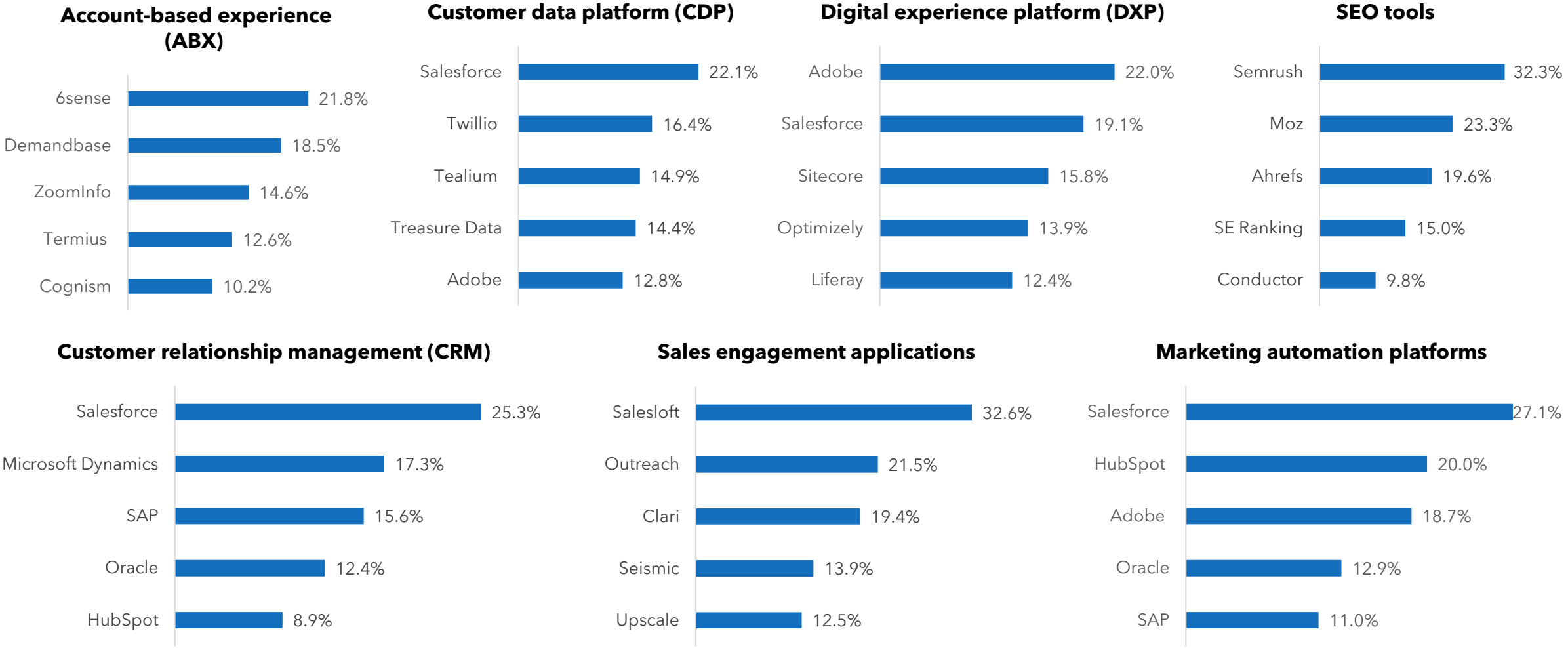
Marketing Functions	US headquartered		EMEA headquartered		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution	Budget distribution	FTE distribution
Executive/Strategy	10.5%	12.4%	8.9%	10.5%	10.0%	10.4%	9.9%	11.6%
Corporate/Marketing communications	13.8%	13.2%	14.2%	13.2%	13.6%	12.6%	14.0%	13.3%
Portfolio/Product marketing	12.3%	12.8%	11.4%	14.4%	11.8%	11.3%	12.0%	14.0%
Campaigns/Demand center	21.6%	15.8%	25.7%	16.4%	23.0%	17.8%	23.2%	15.8%
Field marketing	9.2%	13.2%	9.8%	11.6%	10.4%	12.4%	9.4%	12.4%
Channel marketing	9.9%	11.5%	9.3%	12.7%	9.9%	14.7%	9.6%	11.7%
Marketing operations	12.8%	11.9%	10.7%	11.9%	11.8%	12.3%	12.0%	11.8%
Marketing intelligence	10.0%	9.2%	10.0%	9.2%	9.4%	8.4%	10.0%	9.3%
Total	100%	100%	100%	100%	100%	100%	100%	100%

For US-headquartered enterprises, 21.6% of the marketing budget is allocated to campaigns/demand centers, the single largest share among all marketing functions in the table. Leaders are doubling down on campaign orchestration, channeling the biggest slice of their budgets into demand generation engines that deliver measurable business impact.

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Traditional technology products and solutions still form the bulk of technology spend

Top five tech product distribution as a percentage of total responses



Source: Avasant B2B marketing study survey (n=87)

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Investments in technology and emerging technology across industries and other categories

Investments in technology	Tech budget as a % of marketing budget	Emerging tech budget as a % of marketing budget			Emerging tech budget as a % of technology budget			Emerging tech budget per marketing employee		
	Average	25th	Median	75th	25th	Median	75th	25th	Median	75th
Financial services	18.0%	2.3%	3.0%	3.6%	11.0%	15.0%	19.0%	$6,673	$11,254	$15,713
Healthcare	19.9%	3.0%	3.8%	4.5%	15.0%	17.0%	19.0%	$4,227	$6,104	$14,291
Manufacturing	22.5%	2.4%	3.1%	4.0%	13.3%	15.5%	19.0%	$5,687	$7,544	$15,193
High-tech (SaaS)	19.5%	2.6%	3.5%	4.1%	12.0%	14.0%	19.0%	$4,529	$6,597	$12,138
Enterprise HQ location: US	20.4%	3.0%	3.3%	4.0%	13.0%	15.5%	19.0%	$5,607	$8,790	$14,673
Enterprise HQ location: EMEA	19.8%	2.4%	3.0%	4.2%	12.0%	15.0%	18.5%	$4,956	$6,730	$14,395
Enterprise revenue: $500M-$5B	22.3%	3.0%	3.3%	4.2%	12.0%	15.0%	19.0%	$4,527	$6,166	$11,610
Enterprise revenue: More than $5B	20.0%	2.4%	3.0%	3.9%	13.0%	15.0%	19.5%	$6,673	$12,687	$16,574

Manufacturing companies allocate an average of 22.5% of their marketing budget to technology, the highest percentage among all industries in the table. Leaders are making bold tech bets, outspending every other sector to leapfrog into a data-driven, AI-powered future.

Source: Avasant B2B marketing study survey (n=87)

Marketing budget and FTE distribution by internal and outsourced

FTE and budget split	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Internal	External/ Outsourced	Internal	External/ Outsourced	Internal	External/ Outsourced	Internal	External/ Outsourced
Marketing FTE	61.8%	38.2%	60.6%	39.4%	61.6%	38.4%	63.5%	36.5%
Marketing budget	63.1%	36.9%	61.2%	38.8%	58.7%	41.3%	57.4%	42.6%

FTE and budget split	US headquartered		EMEA headquartered		Enterprise revenue ($500M-$5B)		Enterprise revenue (More than $5B)	
	Internal	External/ Outsourced	Internal	External/ Outsourced	Internal	External/ Outsourced	Internal	External/ Outsourced
Marketing FTE	62.0%	38.0%	61.6%	38.4%	61.1%	38.9%	61.9%	38.1%
Marketing budget	60.5%	39.5%	60.8%	39.2%	59.1%	40.9%	60.7%	39.3%

In the high-tech (SaaS) sector, 42.6% of the marketing budget is allocated to external/outsourced, the highest proportion among all industries in the table. Leaders are shifting record portions of their budget to external partners, accelerating innovation and execution by tapping into the global ecosystem of marketing expertise.

Source: Avasant B2B marketing study survey (n=87)

Geographic distribution of internal and external marketing employees

Geographies	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Internal FTE	External FTE	Internal FTE	External FTE	Internal FTE	External FTE	Internal FTE	External FTE
North America (excluding Mexico)	37%	31%	50%	42%	46%	35%	51%	45%
LATAM (including Mexico)	6%	10%	5%	9%	7%	9%	8%	12%
EMEA	48%	40%	43%	39%	37%	35%	30%	28%
APAC	9%	18%	2%	10%	10%	21%	11%	15%
Total	100%	100%	100%	100%	100%	100%	100%	100%

- Internal marketing FTEs comprise the highest share in North America and EMEA across industries, focusing on in-house strategies, while APAC and LATAM rely more on outsourcing due to cost benefits and emerging talent.
- APAC and LATAM are rapidly gaining traction due to their young, tech-savvy workforce and competitive operating costs. This explains the higher external FTE allocation in these regions compared to internal teams.
- The higher proportion of external FTEs in LATAM suggests a growing trend toward nearshore outsourcing for cultural alignment and time zone compatibility, balancing cost efficiency with operational effectiveness.

Geographies	US headquartered		EMEA headquartered		Enterprise revenue ($500M-$5B)		Enterprise revenue (More than $5B)	
	Internal FTE	External FTE	Internal FTE	External FTE	Internal FTE	External FTE	Internal FTE	External FTE
North America (excluding Mexico)	67%	53%	22%	21%	40%	34%	45%	37%
LATAM (including Mexico)	7%	9%	7%	10%	8%	13%	7%	9%
EMEA	16%	19%	63%	52%	44%	39%	40%	36%
APAC	9%	19%	8%	17%	8%	15%	9%	19%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Internal and external FTE distribution across functions by industry

Marketing Functions	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution
Executive/Strategy	17.3%	5.8%	14.8%	5.3%	13.4%	5.3%	14.4%	7.6%
Corporate/Marketing communications	18.4%	10.2%	18.6%	12.9%	9.9%	9.6%	16.2%	12.8%
Portfolio/Product marketing	17.7%	6.4%	15.1%	6.6%	21.0%	6.0%	13.3%	8.8%
Campaigns/Demand center	7.3%	25.4%	9.7%	23.3%	12.0%	27.6%	12.5%	22.6%
Field marketing	13.3%	9.3%	15.3%	10.5%	14.8%	10.4%	11.7%	9.8%
Channel marketing	7.0%	18.6%	7.7%	19.7%	6.7%	20.2%	10.7%	19.0%
Marketing operations	8.7%	13.9%	11.2%	15.5%	12.6%	13.2%	11.4%	11.4%
Marketing intelligence	10.3%	10.4%	7.6%	6.2%	9.8%	7.6%	9.9%	8.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%

In financial services, only 7.3% of internal FTEs are allocated to campaigns/demand center, while a striking 25.4% are external FTEs, which is the highest external-to-internal ratio for any marketing function across all industries in the table. Leaders rely on external partners to drive demand generation at pace, outsourcing core marketing engine work to stay agile in a rapidly shifting market.

Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Internal and external FTE distribution across functions by enterprise HQ location and revenue

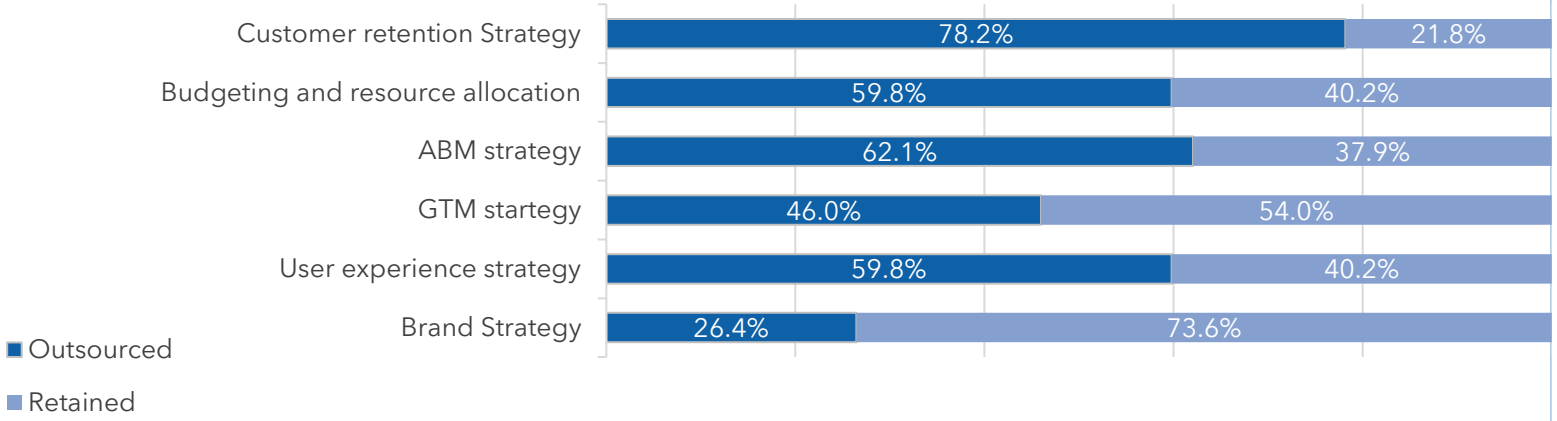
Marketing Functions	US headquartered		EMEA headquartered		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution	Internal FTE distribution	External FTE distribution
Executive/Strategy	16.0%	6.6%	13.9%	5.1%	13.5%	5.7%	15.2%	5.8%
Corporate/Marketing communications	15.0%	10.5%	14.6%	10.9%	14.0%	10.5%	14.8%	10.7%
Portfolio/Product marketing	16.5%	6.8%	19.4%	6.5%	13.3%	8.4%	18.7%	6.3%
Campaigns/Demand center	10.5%	24.4%	10.0%	26.6%	13.1%	25.2%	9.8%	25.6%
Field marketing	14.2%	11.4%	13.5%	8.6%	13.7%	10.3%	13.9%	9.9%
Channel marketing	7.4%	18.1%	7.7%	20.7%	11.1%	19.9%	7.0%	19.4%
Marketing operations	11.2%	13.1%	10.7%	13.8%	11.9%	13.0%	10.8%	13.5%
Marketing intelligence	9.2%	9.1%	10.1%	7.7%	9.3%	7.0%	9.7%	8.6%
Total	100%	100%	100%	100%	100%	100%	100%	100%

AI-powered campaign budget optimizers have started delivering significant return on ad spend (ROAS) for product lines by dynamically reallocating budgets in real time based on emerging trends and performance data. Leaders are turning to AI agents that autonomously optimize spend, unlocking performance gains that human teams cannot match.

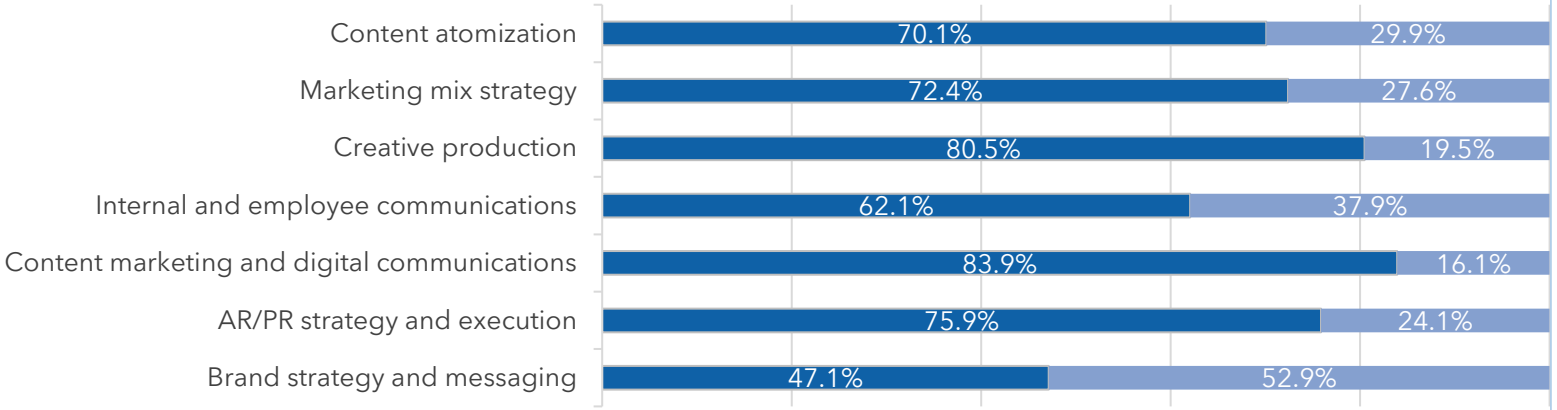
Source: Avasant B2B marketing study survey (n=87)
Percentages may not add up to 100% due to rounding off.

Outsourcing maturity across functions (1/4)

Percentage outsourced vs. retained: **Executive strategy**



Percentage outsourced vs. retained: **Corporate marketing**



Key observations:

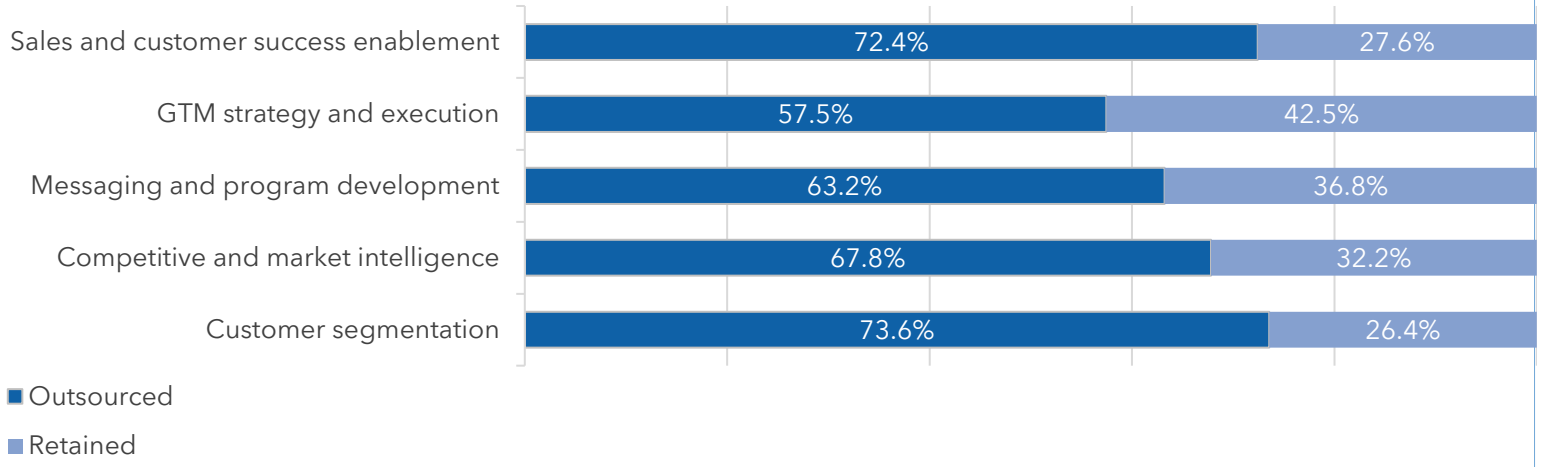
- **Strategic value assessment:** Key considerations for outsourcing vs. in-house include the function's strategic value and the availability of in-house expertise.
- **Core vs. tactical allocation:** Functions that are core to the brand's strategic positioning tend to be kept in-house, while tactical or execution-heavy tasks are often outsourced.
- **Focus on high-value initiatives:** Enterprises outsource non-core activities, so they can focus internal resources on strategic initiatives such as brand building, customer relationship management, and innovation.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

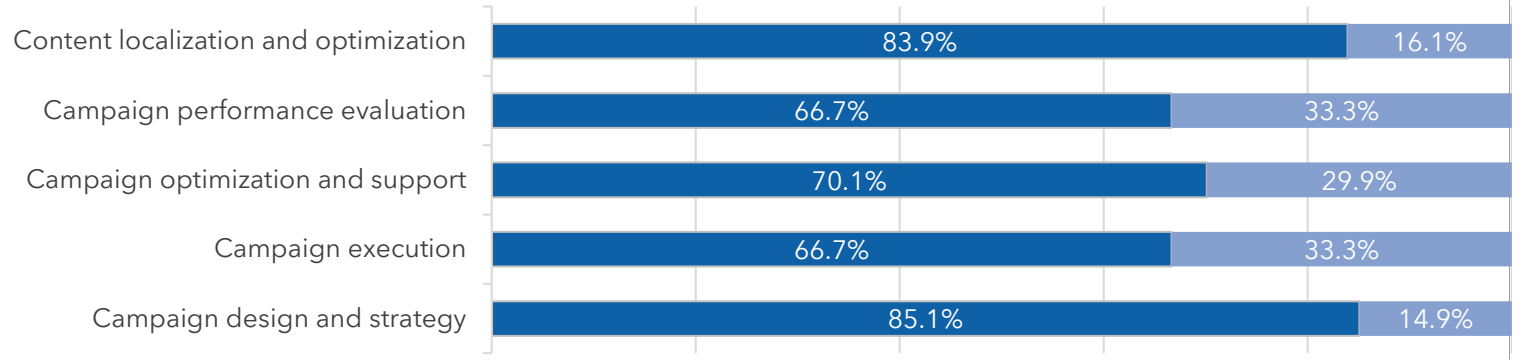
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Outsourcing maturity across functions (2/4)

Percentage outsourced vs. retained: **Product/Portfolio marketing**



Percentage outsourced vs. retained: **Campaigns/Demand center**



Key observations:

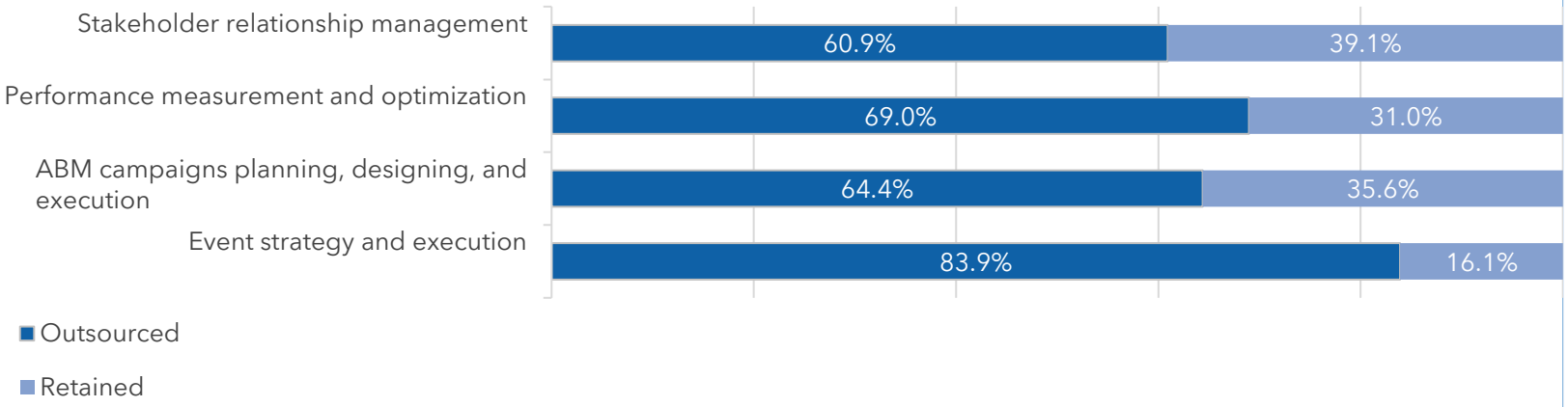
- **Strategic innovation:** Companies that outsourced advanced data analytics or creative strategy functions experienced strategic innovation.
- **Specialized expertise for better outcomes:** Outsourced partners provide specialized expertise that dramatically improves campaign outcomes.
- **Fresh creative perspectives:** Outsourced teams brought fresh perspectives to digital content creation, leveraging generative AI tools to develop personalized messaging at scale.
- **Agile market responsiveness:** Enterprises' ability to rapidly adjust campaigns in response to market changes was largely attributed to flexible, outsourced models. This agility translated into measurable improvements in market responsiveness and competitive positioning.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

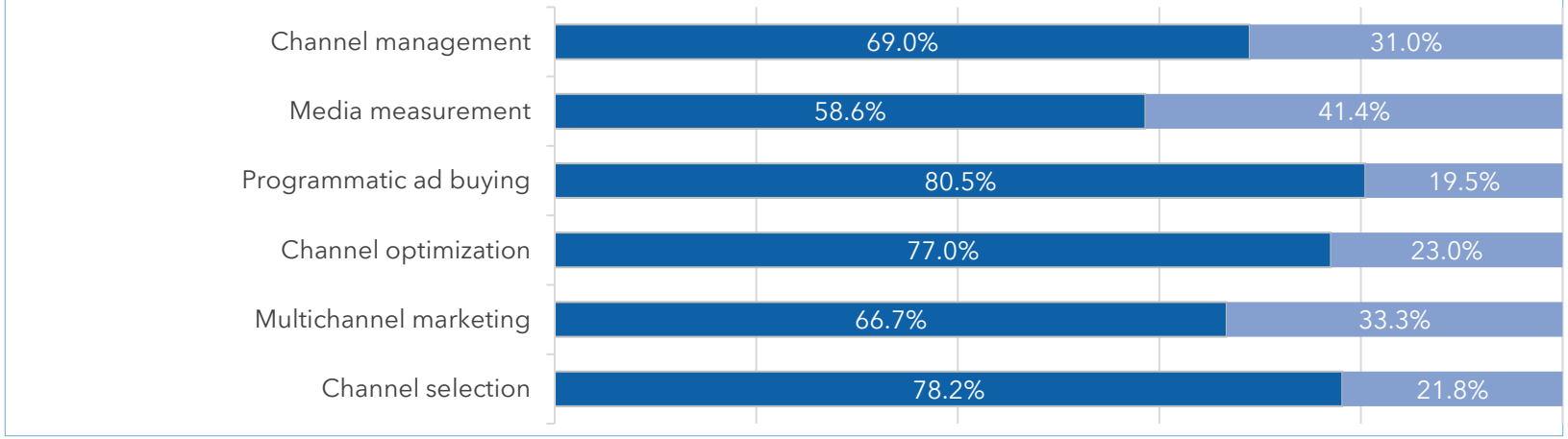
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Outsourcing maturity across functions (3/4)

Percentage outsourced vs. retained: **Field marketing**



Percentage outsourced vs. retained: **Channel marketing**



Key observations:

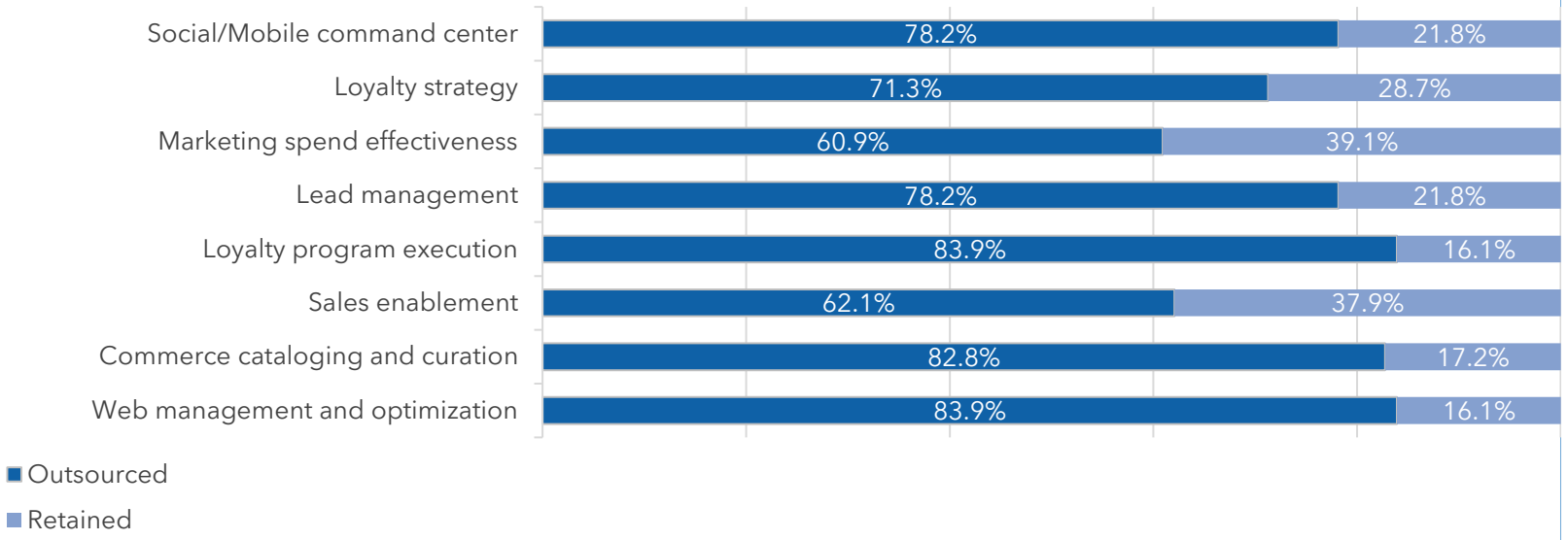
- **Advanced technical capabilities through outsourcing:** Some organizations have successfully leveraged outsourced teams for complex tasks such as API integrations and platform optimization.
- **Omnichannel execution driving demand:** The trend toward seamless, omnichannel customer engagement is driving outsourcing. Firms are increasingly looking for partners who can manage integrated campaigns across digital, social, and traditional channels.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

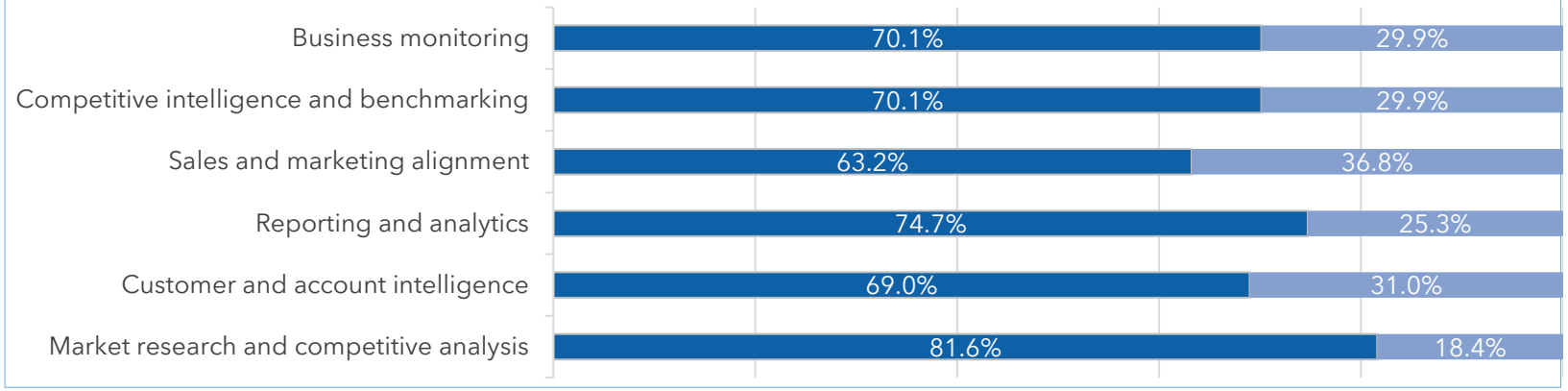
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Outsourcing maturity across functions (4/4)

Percentage outsourced vs. retained: **Marketing operations**



Percentage outsourced vs. retained: **Marketing intelligence**



Key observations:

- **Cost-efficient technical outsourcing:** Outsourcing critical technical functions helps enterprises reduce costs. For instance, an organization outsourced its digital analytics function, which led to a 30% reduction in overhead expenses while simultaneously improving analytical accuracy and speed.

- **Innovation through data and creative partnerships:** Enterprises that outsourced advanced data analytics or creative strategy functions experienced strategic innovation. For instance, outsourced teams use AI to segment customer data more effectively, leading to more targeted and successful campaigns.

Source: Avasant B2B marketing study survey (n=87) and IDIs (n=11)

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Outsourcing maturity across functions: Executive strategy

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Brand strategy	17.4%	82.6%	36.4%	63.6%	36.4%	63.6%	15.0%	85.0%
User experience strategy	60.9%	39.1%	63.6%	36.4%	68.2%	31.8%	45.0%	55.0%
GTM strategy	52.2%	47.8%	45.5%	54.6%	45.5%	54.5%	40.0%	60.0%
ABX strategy	65.2%	34.8%	59.1%	40.9%	72.7%	27.3%	50.0%	50.0%
Budgeting and resource allocation	56.5%	43.5%	63.6%	36.4%	54.6%	45.4%	65.0%	35.0%
Customer retention strategy	69.6%	30.4%	81.8%	18.2%	77.3%	22.7%	85.0%	15.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Brand strategy	27.5%	72.5%	25.5%	74.5%	26.9%	73.1%	25.7%	74.3%
User experience strategy	50.0%	50.0%	68.1%	31.9%	63.5%	36.5%	54.3%	45.7%
GTM strategy	47.5%	52.5%	44.7%	55.3%	42.3%	57.7%	51.4%	48.6%
ABX strategy	52.5%	47.5%	70.2%	29.8%	65.4%	34.6%	57.1%	42.9%
Budgeting and resource allocation	57.5%	42.5%	61.7%	38.3%	69.2%	30.8%	45.7%	54.3%
Customer retention strategy	75.0%	25.0%	80.9%	19.1%	75.0%	25.0%	82.9%	17.1%

The healthcare sector has the highest outsourcing rate for customer retention strategy at 81.8% across this subfunction in all industries and regions in the table. Leaders outsource the critical task of keeping customers engaged, relying on external partners to deliver loyalty and lifetime value in an era of rising patient and client expectations.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Corporate/Marketing communications

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Brand strategy and messaging	47.8%	52.2%	68.2%	52.2%	40.91%	59.09%	30.0%	70.0%
AR/PR strategy and execution	60.9%	39.1%	68.2%	39.1%	86.36%	13.64%	90.0%	10.0%
Content marketing and digital communications	78.3%	21.7%	81.8%	21.7%	95.45%	4.55%	80.0%	20.0%
Internal and employee communications	60.9%	39.1%	72.7%	39.1%	45.45%	54.55%	70.0%	30.0%
Creative production	82.6%	17.4%	68.2%	17.4%	86.36%	13.64%	85.0%	15.0%
Marketing mix strategy	65.2%	34.8%	81.8%	34.8%	68.18%	31.82%	75.0%	25.0%
Content atomization	73.9%	26.1%	77.3%	26.1%	72.73%	27.27%	55.0%	45.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Brand strategy and messaging	32.5%	67.5%	59.6%	40.4%	40.4%	59.6%	57.1%	42.9%
AR/PR strategy and execution	77.5%	22.5%	74.5%	25.5%	73.1%	26.9%	80.0%	20.0%
Content marketing and digital communications	85.0%	15.0%	83.0%	17.0%	82.7%	17.3%	85.7%	14.3%
Internal and employee communications	55.0%	45.0%	68.1%	31.9%	63.5%	36.5%	60.0%	40.0%
Creative production	77.5%	22.5%	83.0%	17.0%	80.8%	19.2%	80.0%	20.0%
Marketing mix strategy	62.5%	37.5%	80.9%	19.1%	73.1%	26.9%	71.4%	28.6%
Content atomization	67.5%	32.5%	72.3%	27.7%	63.5%	36.5%	80.0%	20.0%

The manufacturing sector has the highest outsourcing rate for content marketing and digital communications at 95.45% across this subfunction in all industries and regions in the table. Leaders rely on external partners to deliver the creativity and agility needed to compete in today's digital-first landscape.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Product/Portfolio marketing

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Customer segmentation	69.6%	30.4%	77.27%	22.73%	72.7%	27.3%	75.0%	25.0%
Competitive and market intelligence	47.8%	52.2%	77.27%	22.73%	68.2%	31.8%	80.0%	20.0%
Messaging and program development	60.9%	39.1%	59.09%	40.91%	59.1%	40.9%	75.0%	25.0%
GTM strategy and execution	52.2%	47.8%	54.55%	45.45%	45.5%	54.5%	80.0%	20.0%
Sales and customer success enablement	69.6%	30.4%	81.82%	18.18%	77.3%	22.7%	60.0%	40.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Customer segmentation	77.5%	22.5%	70.2%	29.8%	71.2%	28.8%	77.1%	22.9%
Competitive and market intelligence	75.0%	25.0%	61.7%	38.3%	71.2%	28.8%	62.9%	37.1%
Messaging and program development	60.0%	40.0%	66.0%	34.0%	67.3%	32.7%	57.1%	42.9%
GTM strategy and execution	52.5%	47.5%	61.7%	38.3%	59.6%	40.4%	54.3%	45.7%
Sales and customer success enablement	70.0%	30.0%	74.5%	25.5%	73.1%	26.9%	71.4%	28.6%

The high-tech (SaaS) sector has the highest outsourcing rate for competitive and market intelligence activities at 80.0% across this subfunction in all industries in the table. Leaders turn to specialized partners for gathering critical insights to stay ahead of accelerating market shifts and competitive threats.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Campaigns/Demand center

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Campaign design and strategy	82.6%	17.4%	90.9%	9.1%	81.8%	18.2%	85.0%	15.0%
Campaign execution	73.9%	26.1%	68.2%	31.8%	59.1%	40.9%	65.0%	35.0%
Campaign optimization and support	65.2%	34.8%	72.7%	27.3%	72.7%	27.3%	70.0%	30.0%
Campaign performance evaluation	69.6%	30.4%	72.7%	27.3%	63.6%	36.4%	60.0%	40.0%
Content localization and optimization	78.3%	21.7%	86.4%	13.6%	86.4%	13.6%	85.0%	15.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Campaign design and strategy	82.5%	17.5%	87.2%	12.8%	84.6%	15.4%	85.7%	14.3%
Campaign execution	67.5%	32.5%	66.0%	34.0%	65.4%	34.6%	68.6%	31.4%
Campaign optimization and support	72.5%	27.5%	68.1%	31.9%	73.1%	26.9%	65.7%	34.3%
Campaign performance evaluation	70.0%	30.0%	63.8%	36.2%	63.5%	36.5%	71.4%	28.6%
Content localization and optimization	90.0%	10.0%	78.7%	21.3%	84.6%	15.4%	82.9%	17.1%

The US has the highest outsourcing rate for content localization and optimization within campaign management at 90.0% for this subfunction across all industries and regions in the table. Leaders outsource to external partners to deliver hyper-local, personalized content that meets the demands of global digital audiences.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Field marketing

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Event strategy and execution	82.6%	17.4%	86.4%	13.6%	90.9%	9.1%	75.0%	25.0%
ABX campaigns planning, designing, and execution	60.9%	39.1%	59.1%	40.9%	68.2%	31.8%	70.0%	30.0%
Performance measurement and optimization	60.9%	39.1%	77.3%	22.7%	63.6%	36.4%	75.0%	25.0%
Stakeholder relationship management	43.5%	56.5%	68.2%	31.8%	63.6%	36.4%	70.0%	30.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Event strategy and execution	85.0%	15.0%	83.0%	17.0%	78.8%	21.2%	91.4%	8.6%
ABX campaigns planning, designing, and execution	70.0%	30.0%	59.6%	40.4%	63.5%	36.5%	65.7%	34.3%
Performance measurement and optimization	75.0%	25.0%	63.8%	36.2%	69.2%	30.8%	68.6%	31.4%
Stakeholder relationship management	60.0%	40.0%	61.7%	38.3%	67.3%	32.7%	51.4%	48.6%

The manufacturing sector has the highest outsourcing rate for event strategy and execution in field marketing at 90.9% among all industries and regions in the table. Leaders outsource to external partners to deliver impact and agility on the front lines of customer engagement.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Channel marketing

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Channel selection	91.3%	8.7%	81.8%	18.2%	72.7%	27.3%	65.0%	35.0%
Multichannel marketing	56.5%	43.5%	54.5%	45.5%	81.8%	18.2%	75.0%	25.0%
Channel optimization	60.9%	39.1%	86.4%	13.6%	86.4%	13.6%	75.0%	25.0%
Programmatic ad buying	82.6%	17.4%	72.7%	27.3%	90.9%	9.1%	75.0%	25.0%
Media measurement	56.5%	43.5%	72.7%	27.3%	50.0%	50.0%	55.0%	45.0%
Channel management	69.6%	30.4%	68.2%	31.8%	68.2%	31.8%	70.0%	30.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Channel selection	75.0%	25.0%	80.9%	19.1%	73.1%	26.9%	85.7%	14.3%
Multichannel marketing	72.5%	27.5%	61.7%	38.3%	71.2%	28.8%	60.0%	40.0%
Channel optimization	87.5%	12.5%	68.1%	31.9%	73.1%	26.9%	82.9%	17.1%
Programmatic ad buying	80.0%	20.0%	80.9%	19.1%	75.0%	25.0%	88.6%	11.4%
Media measurement	60.0%	40.0%	57.4%	42.6%	55.8%	44.2%	62.9%	37.1%
Channel management	67.5%	32.5%	70.2%	29.8%	69.2%	30.8%	68.6%	31.4%

In the financial services sector, an overwhelming 91.3% of channel selection activities are outsourced, representing the highest outsourcing rate for any channel marketing subfunction across all industries in the table. Leaders outsource the decision-making, relying on external specialists to navigate today's complex, multichannel landscape and accelerate the go-to-market impact.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Marketing operations

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Web management and optimization	78.3%	21.7%	100.0%	0.0%	77.3%	22.7%	80.0%	20.0%
Commerce cataloging and curation	65.2%	34.8%	86.4%	13.6%	95.5%	4.5%	85.0%	15.0%
Sales enablement	56.5%	43.5%	72.7%	27.3%	68.2%	31.8%	50.0%	50.0%
Loyalty program execution	69.6%	30.4%	86.4%	13.6%	90.9%	9.1%	90.0%	10.0%
Lead management	82.6%	17.4%	81.8%	18.2%	77.3%	22.7%	70.0%	30.0%
Marketing spend effectiveness	47.8%	52.2%	77.3%	22.7%	63.6%	36.4%	55.0%	45.0%
Loyalty strategy	69.6%	30.4%	72.7%	27.3%	72.7%	27.3%	70.0%	30.0%
Social/Mobile command center	82.6%	17.4%	77.3%	22.7%	72.7%	27.3%	80.0%	20.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Web management and optimization	77.5%	22.5%	89.4%	10.6%	84.6%	15.4%	82.9%	17.1%
Commerce cataloging and curation	92.5%	7.5%	74.5%	25.5%	82.7%	17.3%	82.9%	17.1%
Sales enablement	57.5%	42.5%	66.0%	34.0%	59.6%	40.4%	65.7%	34.3%
Loyalty program execution	87.5%	12.5%	80.9%	19.1%	75.0%	25.0%	97.1%	2.9%
Lead management	75.0%	25.0%	80.9%	19.1%	78.8%	21.2%	77.1%	22.9%
Marketing spend effectiveness	65.0%	35.0%	57.4%	42.6%	57.7%	42.3%	65.7%	34.3%
Loyalty strategy	65.0%	35.0%	76.6%	23.4%	67.3%	32.7%	77.1%	22.9%
Social/Mobile command center	75.0%	25.0%	80.9%	19.1%	84.6%	15.4%	68.6%	31.4%

In the US, 92.5% of commerce cataloging and curation within marketing operations is outsourced, the highest outsourcing rate across all categories. Leaders rent expertise at scale to keep pace with digital commerce's relentless speed and complexity.

Source: Avasant B2B marketing study survey (n=87)

Outsourcing maturity across functions: Marketing intelligence

Subfunction	Financial services		Healthcare		Manufacturing		High-tech (SaaS)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Market research and competitive analysis	78.3%	21.7%	90.9%	9.1%	72.7%	27.3%	85.0%	15.0%
Customer and account intelligence	65.2%	34.8%	68.2%	31.8%	63.6%	36.4%	80.0%	20.0%
Reporting and analytics	65.2%	34.8%	81.8%	18.2%	72.7%	27.3%	80.0%	20.0%
Sales & marketing alignment	60.9%	39.1%	45.5%	54.5%	68.2%	31.8%	80.0%	20.0%
Competitive intelligence & benchmarking	60.9%	39.1%	77.3%	22.7%	72.7%	27.3%	70.0%	30.0%
Business monitoring	60.9%	39.1%	72.7%	27.3%	77.3%	22.7%	70.0%	30.0%

Subfunction	US		EMEA		Revenue ($500M-$5B)		Revenue (More than $5B)	
	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained	Outsourced	Retained
Market research and competitive analysis	82.5%	17.5%	80.9%	19.1%	82.7%	17.3%	80.0%	20.0%
Customer and account intelligence	67.5%	32.5%	70.2%	29.8%	73.1%	26.9%	62.9%	37.1%
Reporting and analytics	82.5%	17.5%	68.1%	31.9%	73.1%	26.9%	77.1%	22.9%
Sales & marketing alignment	62.5%	37.5%	63.8%	36.2%	65.4%	34.6%	60.0%	40.0%
Competitive intelligence & benchmarking	67.5%	32.5%	72.3%	27.7%	69.2%	30.8%	71.4%	28.6%
Business monitoring	67.5%	32.5%	72.3%	27.7%	65.4%	34.6%	77.1%	22.9%

In the healthcare sector, 90.9% of market research and competitive analysis is outsourced, making it the highest outsourcing rate among all industries and subfunctions shown in the data. Leaders outsource critical marketing intelligence at unprecedented levels to keep pace with digital disruption and outmaneuver the competition.

Source: Avasant B2B marketing study survey (n=87)

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