B2B's Brave New World of BDX™.

Key takeaways from the inaugural London Brand-to-Demand Conference

Stein.

Transformative shifts are fundamentally reframing B2B marketing

The recent London Brand-to-Demand Conference brought together B2B marketing leaders to address the state of brand and demand unification. One key takeaway from the conference is that while the industry universally agrees on the importance of integrating brand and demand, the majority of organizations remain trapped in siloed approaches that impede marketing effectiveness and efficiency — and limit growth.

Event sessions revealed both the persistent challenge and roadmap for transformation via unified Brand-to-Demand Experiences (BDX®).

A look at key takeaways:

- **The BDX gap is wide**, with only 20% of marketers achieving significant brand-to-demand integration despite all recognizing its importance.
- **Underinvestment in B2B marketing** (and B2B brand marketing in particular) is leaving trillions of dollars in brand value on the table.
- Siloed brand and demand functions are a drag on effectiveness — **integrated, agile, cross-functional "squads"** are becoming essential for outperformance.
- **Emotion in B2B is a winning strategy** — brands winning in the market are those ambitious enough to abandon the "comfort" of rational messaging for the power of emotional connection.
- **A balance between brand and demand** must be struck — and investment allocation and measurement are among the keys.
- Marketers who **speak the language of their businesses** are successfully unlocking investment.

Brand-to-Demand Conference organizers:

Stein. | ANA | Brand Finance | IAA United Kingdom | LinkedIn

Brand to demand: B2B's GTM of the future.

The most striking revelation from the London event was excitement around brand-to-demand unification and the disconnect between aspiration and current reality.

While 100% of marketers surveyed in the 2025 Brand-to-Demand Maturity Study conducted by Stein and ANA believe that brand-to-demand integration is important, 80% remain either not or barely on the path to brand-to-demand maturity.

Further, only 3% have achieved "fully unified" brand-to-demand maturity — what Stein's Chief Innovation Officer, Marc Keating, called "unicorn status."

Nonetheless, speakers and marketers surveyed universally view brand-to-demand integration as both inevitable and a massive opportunity that is in progress.

The reasons why were made clear in the Maturity Study findings: among organizations achieving higher brand-to-demand maturity, 94% are experiencing greater full-funnel marketing effectiveness, 90% are seeing measurable contribution to growth and 89% are witnessing stronger revenue performance.

As Sonia David, Vice President of ANA's B2B Practice, emphasized, those who crack the brand-to-demand code are "able to talk to their C-suite by saying that their brand efforts are increasing win rates, decreasing cost per acquisition and protecting against competition."

Unlocking investment by speaking the language of the C-suite.

The need to "crack the code" becomes ever-more urgent considering the B2B brand value currently being left on the table. According to the ANA/Stein Maturity Study, 85% of marketers surveyed believe their organization underinvests in marketing.

Brand Finance Chairman David Haigh quantified the impact: the top 500 B2C brands deliver $3.5 trillion more in brand value as part of overall enterprise value than their top 500 B2B counterparts. To this point, B2C companies' brand value represents 18% of overall enterprise value compared to 13% for B2B companies — a 38% delta. The net takeaway: more marketing investment builds more brand strength, brand value and enterprise value — making this a balance sheet conversation.

> "The top 500 B2C brands deliver $3.5 trillion more in brand value as part of overall enterprise value than their top 500 B2B counterparts."
>
> David Haigh, Chairman, Brand Finance

The solution — consistently emphasized — was to shift the conversation from marketing metrics to business metrics. As Sarah Campbell, Global Brand Director at JLL, noted, establishing tangible brand value via greater investment "gives us space to land our key points" with finance teams. The most successful marketers are speaking the C-suite's language — leaning into the three Rs: revenue, ROI and risk mitigation.

Petra Ernlund, Global Marketing Manager at Kuehne + Nagel, shared how a brand survey that "showed that we were not positioned as competitively as we thought in the market" shocked the board into action, unlocking significant brand investment.

Alexander Engelhardt, VP of Brand Management at Deutsche Telekom, stated "What we know from neuroscience is that there are no linear decisions in B2B. Even if the stakes are high and the committees are large or careers are on the line, the brand is a decisive factor in the end."

And David Haigh offered advice from "the other side of the table." David advised demonstrating understanding of the business model, speaking the language of margins and revenue, and showing how brand investment directly impacts commercial metrics like win rates, customer acquisition costs and even the cost of capital.

A new mental model to understand B2B buying.

LinkedIn's groundbreaking Buyability research, presented by Jann Schwarz, Senior Director of Marketplace Innovation and Mimi Turner, Head of Marketplace Innovation, revealed a critical missing link in traditional B2B marketing models. LinkedIn's research-based Buyability mental model indicates that building collective confidence among target and hidden buyers enables brands to progress from consideration and shortlist to closed-won. The key drivers of Buyability — "reputation, trust and peer network validation — become more important the closer you get to the final buying decision," not less (as conventional wisdom suggests).

> "Let's come up with a model that understands the complexity of the buyer group and understands the emotional, social as well as the functional drivers or jobs to be done."
>
> Jann Schwarz, Senior Director of Marketplace Innovation, LinkedIn

Buyability isn't about awareness, though its starting point is the category fame that drives shortlisting. It's about building collective confidence through social proof and cultural relatability. As Mimi Turner emphasized, "Socially oriented attributes were much more influential than rational attributes" in driving purchase decisions. "We virtually couldn't find anybody who said that they were willing to buy something that somebody they knew said they didn't trust."

Buyers need to defend their decisions if things go wrong, and the most defensible position is social proof — showing that companies like theirs succeeded with the same vendor. Further, being "widely known in your target category within target companies is actually more likely to lead to success than being narrowly known by experts," even for passionate advocates.

This new insight fundamentally reframes the role of brand as full funnel, and suggests a new set of strategies and tactics to optimize Buyability.

The operational revolution: From silos to squads.

The Brand-to-Demand Conference showcased multiple organizations actively revisiting traditional marketing organization structures. Juniper Networks' transformation, highlighted by Marc Keating, involved moving from 500 performance dashboards to one holistic view and breaking down brand and demand team silos to create cross-functional "squads" that owned the entire customer journey.

Neil Dowling, Head of Global Marketing at Genpact, described its shift to a "Fit for the Future" model, with pods aligned to go-to-market segments rather than functional specialties — proving smaller, agile teams can outperform larger, siloed organizations.

Yet, as Marc Keating acknowledged, the structural reworking is only part of the equation: "We all have to grapple with corporate brands, then put that through into business units, into products, into solutions, messaging architectures, segments and regions." The complexity requires rigorous orchestration — ensuring brand activity builds momentum that realizes more demand at lower cost.

In seeking to break down organizational barriers and unify experiences, Xenthe Bang, Head of Enterprise Marketing Strategy and Demand Generation at S&P Global, emphasized the importance of being "data fluent" and "empathetic with customers," stressing the need to "turn analytics into action" by looking at what works each day and doing more of it.

The message was consistent across all presenters: old operating models are no longer fit for purpose, if they ever were. Agility, speed to market, orchestration capabilities and cross-functional integration are now table stakes.

Emotion is becoming B2B's strategic advantage.

Salesforce's CMO & Vice President Marketing ASEAN and the 2025 Creative B2B Lions jury president, Wendy Walker, reported that this year saw the strongest B2B creative work yet at Cannes — marked by greater depth, diversity and ambition than ever before. Brands are confidently leaning into human insights, emotion and humor, signaling an ongoing lift in B2B creative confidence.

Walker observed how brands are increasingly comfortable showing their personality through emotion, with humor being "confidently and consistently used in some of the outstanding work." Beyond entertainment value, the jury saw:

- More creative use of influencers
- A rise in empathetic campaigns grounded in real-world problems
- Purpose-led work tightly connected to measurable impact — demonstrating the power of aligning brand with community

Most significantly, Walker noted far more commitment to long-term brand building with sustained consistency — a "growth multiplier" that represents a strategic evolution. As Chief Operating Officer, LIONS and President, LIONS Intelligence, Paul Coxhill, noted, the combined effect of brand and performance advertising creates an "outsized impact on growth," but only when emotion and humanity are central to the creative strategy. This represents a seismic shift from the "sea of sameness" that characterized B2B creative just a few years ago.

The winning work at Cannes landed the point that B2B buyers are humans first.

GoDaddy's Grand Prix in the Creative B2B Lions exemplified this, succeeding through what Walker called "creative boldness built from universal human insight."

Other campaigns, like Nescafe's Plantlets for Future, put "real creativity into action" — leveraging the creativity of its product and supply chain to create a sustainable platform for the brand that's invested in consistently over time.

The clear takeaway: the brands winning at Cannes — and winning in market — are those brave enough to abandon the comfort of rational messaging for the power of emotional connection.

Redefining storytelling in B2B.

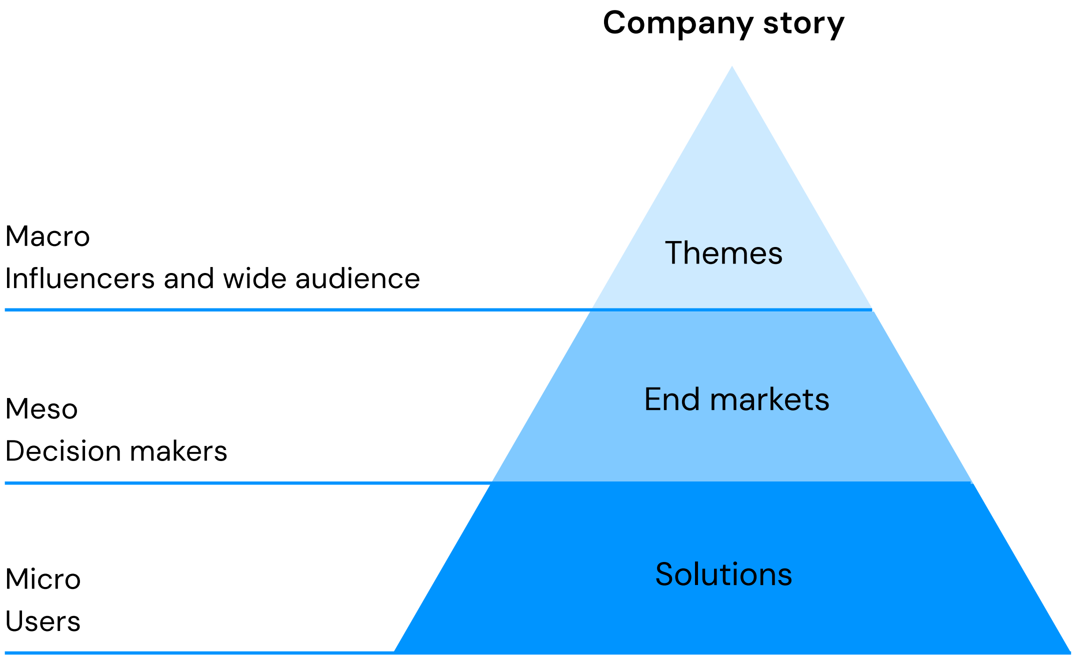
As Tom Stein, Chairman of Stein, called out, "Evolving brands in B2B, of which there are many, seeking to create future demand" require a new approach to storytelling. Now, a consistent narrative that can be adapted to all conversations across brand and demand is required.

Steve Smith, VP Global Communications and Thought Leadership at Schneider Electric, presented a masterclass in strategic storytelling with his "macro-meso-micro" framework. The framework allows Schneider Electric to speak to everyone with utmost relevance, from governments to CEOs to individual consumers, with "a story that anybody can relate to."

The framework operates at three levels, with each level reinforcing the others:

- **Macro** — addressing megatrends like the energy transition
- **Meso** — targeting specific market segments like commercial buildings or data centers
- **Micro** — connecting to specific product innovations and business value

Smith noted that storytelling doesn't need massive budgets when it connects universal human truths to specific business value, stating "Schneider is transitioning from manufacturer to a global energy tech company. Storytelling is a big piece of that."



> **"Storytelling doesn't need loads of budget… You come up with a great story and you create huge amounts of interest."**
>
> Steve Smith, VP Global Communications and Thought Leadership, Schneider Electric

Striking the right balance is important — and measurement can help.

Throughout the day, presenters revealed a clear imbalance in B2B marketing budget allocation. Per the Brand-to-Demand Maturity Study, only 24% of organizations cite an equal brand-to-demand mix today — yet 72% believe that's the ideal path to impact. Data shows most budgets heavily skew toward demand.

There's an evident need to move away from short-term tactics and build brand for long-term growth.

Vicky Kerr, Director of International Marketing at Uber for Business, noted that there's an evolution needed for "balancing the demand in the brand and the brand in the demand," and getting the balance of investment correct is essential for that journey.

Yet, measurement may be the compass for optimizing allocation to best effect.

Sonia David shared a case study from SAS, the global AI and analytics software leader, that demonstrated how unified measurement helped the company find its optimal 70% brand/30% demand mix — with that mix delivering the lowest cost per acquisition. This mix was tested against a range of brand-led and demand-led allocations — and was the clear winner. Further evidence cited by SAS in support of brand-to-demand balance included tests revealing that audiences exposed to both brand and demand communications were 53% more likely to convert.

Rigorous testing, including media mix modeling, lift studies, and shared dashboards that align brand and demand teams around common language and metrics are emerging mandatories.

The key insight: measurement must transcend traditional attribution models to capture the multiplier effect of brand on demand. As Sarah Campbell articulated, brand valuation becomes "that single truth that connects myriad marketing KPIs into tangible business value."

This approach transforms marketing from a cost center to a demonstrable growth and value driver, giving marketers the evidence they need to secure investment and prove their strategic role to the business.

The path forward.

The London event crystallized a fundamental truth: this is B2B's decade — and the brands that will dominate it won't be those perfecting either brand or demand, but those who recognize them as "two parts of one problem," as Mimi Turner articulated. There's brand value on the table for those bold enough to seize it.

The transformation required isn't incremental — it's fundamental. It demands new operating models, new measurement frameworks, new creative audacity, storytelling that moves and, above all, a new understanding of B2B buying psychology. The organizations that have achieved "unicorn status" aren't waiting for perfect conditions; they're building the future of B2B marketing.

The opportunity has never been clearer. The time to act is now.

These insights represent Stein's synthesis and perspective. For deeper exploration of these themes and their application to your specific context, please connect with us:

Tom Stein
Chairman

Tom.Stein@steinb2b.com

Explore industry-leading brand-to-demand insights and models

Brand-to-Demand Maturity Study developed in partnership with ANA

Download

Access the ***BDX Playbook*** developed with LinkedIn and WARC

Download

Accelerating growth from brand to demand.

Stein helps build the world's most demanded B2B brands by unifying brand and demand — strengthening each to the benefit of both. Through highly effective, highly awarded creativity, B2B's most advanced brand-to-demand model (BDX™) and full-funnel media capabilities, Stein drives differentiation, distinction and growth for clients worldwide.

steinb2b.com

Stein.