

# B2B's New Brand Manifesto

## Key Learnings and Takeaways from Cannes 2025



# SEISMIC SHIFTS

## Are Shaping B2B Marketing

---

### Reframing Brand for What It Needs to Be: a Full-Funnel Growth Engine

The most significant strategic shift observed at Cannes was the reframing of brand in B2B from its legacy role (visual identity, corporate positioning, brand manifestos, episodic campaigns, etc.) to its real role as a full-funnel growth driver. Jim Lesser, Chief Brand Officer at ServiceNow, alongside Marcus Collins, Professor at the University of Michigan, and Diana Luu, VP of Large Customer Sales at LinkedIn, articulated what many have been advocating for: brand in B2B must operate as an end-to-end growth engine.

B2B's long-standing siloed approach – where brand and demand are disconnected from strategy to activation to measurement – is fundamentally flawed in today's complex buying environment. Instead, we're witnessing the emergence of unified brand-to-demand strategies that leverage brand from awareness to consideration to buyability to "closed-won."

*Brand in B2B must operate as an end-to-end growth engine.*





LinkedIn's new, paradigm-shifting study, "Buyability – The Future of B2B Marketing Success" reveals a disarmingly human truth: B2B buying decisions are far less about logic than previously assumed and far more about emotional validation and social proof.

This isn't about manipulating feelings; it's about understanding the psychological infrastructure required to build collective confidence in high-stakes environments. LinkedIn's buyability research reveals four fundamental shifts reshaping B2B marketing.



## First...

The evolution from targeting individuals to building group confidence – recognizing that B2B success requires orchestrating consensus across expanded buying groups (including both direct and hidden buyers).

## Second...

The integration of brand and demand as multiplicative forces rather than competing priorities. Brand doesn't just support demand generation; it amplifies every conversion touchpoint exponentially.

## Third...

The recognition of B2B's sheer magnitude and the opportunity it presents – a \$19.7 trillion opportunity that's growing at 17%+ compound annual rate – and that's waiting for brands that unlock complex buying psychology.

## Finally...

The cultural relatability imperative: "Do companies like mine buy from companies like yours?" This isn't about firmographics or product fit – it's about values alignment, cultural resonance and the deep human need for social compatibility in high-stakes business decisions.

# The Emotional Architecture of B2B Decision-Making

Throughout Cannes this year, one truth crystallized with unprecedented clarity: the era of rational B2B purchasing is over. What we're witnessing is nothing short of a fundamental rewiring of how B2B decisions are made.

As Abhinav Kumar, Global CMO of IT services leader TCS noted on stage at Lions' inaugural B2B Summit, despite ranking as the world's second-largest IT services brand with high category awareness, final purchase decisions transcend rational evaluation. When a buyer's career – and their company's future – hangs in the balance, three emotional pillars determine success: brand strength, relationship depth and trust. Often, Kumar noted, this trust is earned through peer networks and industry executives who've experienced your brand firsthand.

This isn't merely about brand awareness; it's about constructing an emotional safety net that allows entire buying groups to say "yes" with confidence.

*When a buyer's career – and their company's future – hangs in the balance, three emotional pillars determine success: brand strength, relationship depth and trust.*





# The Final Days of Static Brand Strategy

One of the most provocative insights emerging from Cannes wasn't about creativity or AI – it was about the accelerating pace of change. As Stein's chairman Tom Stein noted at the B2B Summit, we're entering a period of "perpetual brand evolution," where brand positioning must adapt in step with accelerating change (most manifest today through the lens of AI).

Jean English's remarkable CMO journey at native-AI cloud brand CoreWeave exemplifies this new reality. Tasked with building an IPO-ready brand in 28 days, she demonstrated that agility isn't just an advantage – it's an existential requirement. Her rapid-fire case study revealed a truth many CMOs are experiencing: the luxury of extended brand development cycles no longer exists.

Perpetual evolution demands abandoning the comfort of "set and forget" strategies for a dynamic "sense and adapt" approach. The brands that will dominate aren't those that achieve perfection, but those that master the art of continuous transformation.



# Especially in B2B, Human Insights Prevail

Marcus Collins's remarks at his presentation in the Palais with Jann Schwarz and Mimi Turner resonated long after the session ended. His pointed question – whether B2B marketers truly understand human behavior well enough to build sustainable brand strength – struck at the heart of our industry's greatest opportunity.

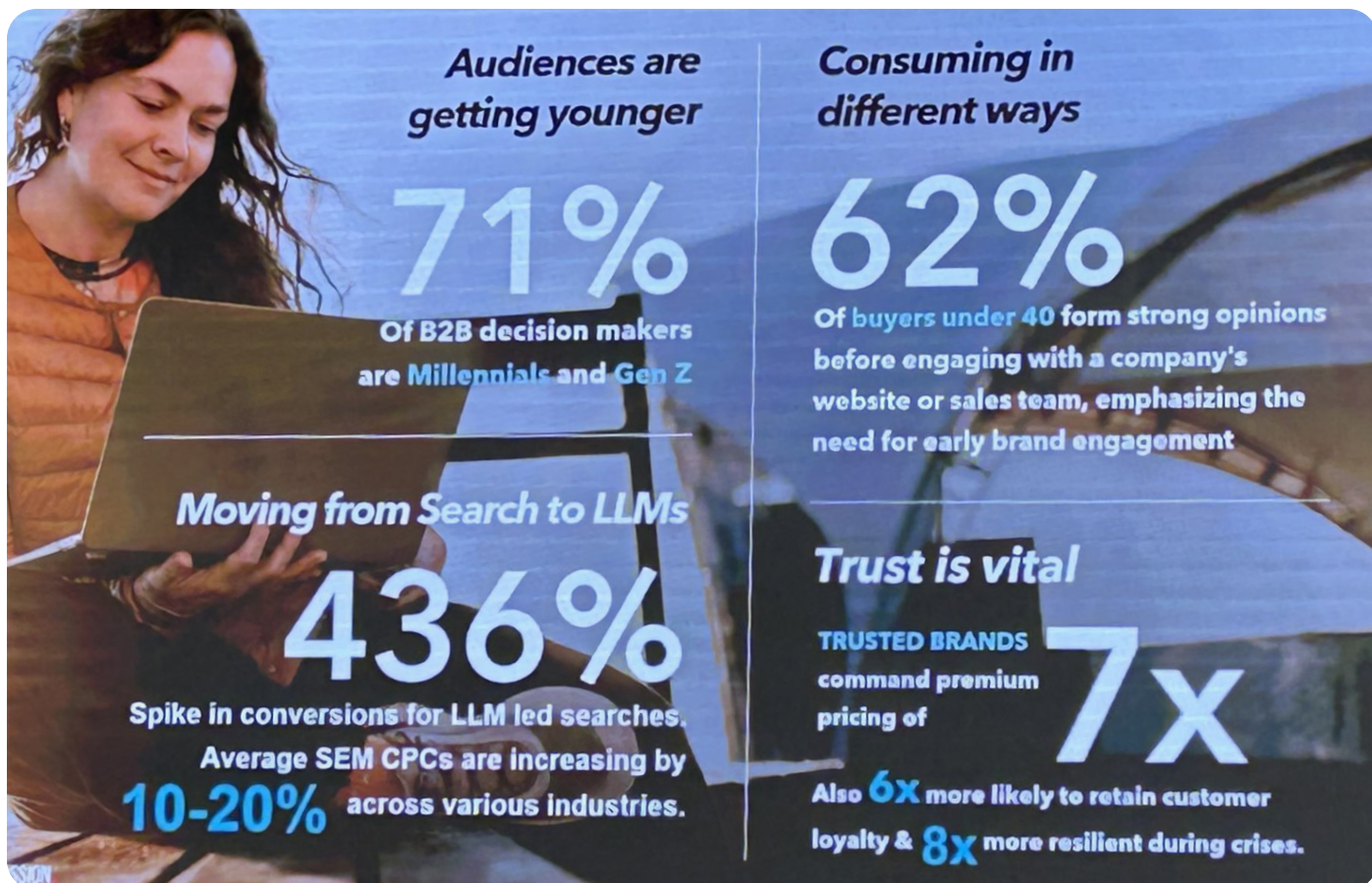
*...even in the most rational business contexts, humans make decisions through emotional filters.*

The Creative B2B Lions Grand Prix winner, GoDaddy, succeeded not through product messaging or rational arguments, but through what Jury President Wendy Walker called “creative boldness built from universal human insight.” This represents a fundamental shift in B2B creative strategy: from product-centric to human insight-informed marketing.

All the winning campaigns this year shared common DNA: an understanding that even in the most rational business contexts, humans make decisions through emotional filters. The challenge for B2B marketers and agencies is developing the capability to uncover these insights and translate them into compelling brand-to-demand experiences.







## The Authenticity Imperative

Yet another actionable insight from Cannes centers on content authenticity. Forrester's data shows that millennials and Gen Z now comprise 71% of B2B buyers. These audiences have developed sophisticated filters for "manufactured content," gravitating instead toward authentic expertise and experiences.

One striking example of this is the data-validated fact that unscripted executive content consistently outperforms traditional video marketing. The production studio is being replaced by the iPhone, because the bar for authentic expertise has never been higher. This creates both opportunity and risk – the barrier to entry has disappeared, but the demand for genuine thought leadership has intensified.

*...the bar for authentic expertise has never been higher.*

*Millennials and Gen Z now comprise 71% of B2B buyers...*

The strategic question every B2B marketer must answer: are we prepared to activate our executive teams as primary content creators? This isn't about celebrity endorsements or influencer partnerships; it's about building systematic capabilities for authentic thought leadership at scale.

# The Courage to be Creative



This year's Creative B2B Lions saw a 15% increase in submissions. Only 45 of the 415 submissions were shortlisted, highlighting the steady and now surging rise in creativity across B2B. Emotion and humor were driving forces as a constant thread in B2B storytelling. Real commercial impact and business growth were mandates to shortlist and win. Wendy Walker's criteria for winning work provides a blueprint for breakthrough creative: campaigns must be brave enough to challenge category conventions, grounded in human insight and executed with authentic emotional depth.

The message is clear: incremental creativity won't suffice. The brands that will capture attention and drive growth are those willing to embrace bold, insight-driven creative that challenges audience expectations and delivers genuine value.

The jury's candid assessment revealed both opportunity and urgency for ambitious B2B brands. The strongest field in Lions B2B history, the selection process was more rigorous than ever – a trend that will only intensify.

**The jury's encouragement was clear: start your 2026 awards submissions now.**

What's clear is that the bar will continue rising. Brands serious about Lions recognition must begin their journey today, not a few months before the deadline. The jury wants to celebrate more breakthrough work – but only campaigns that demonstrate true creative courage married to strategic sophistication will make the cut.



# The Community Imperative

Cannes reminded us of one of marketing's fundamental purposes: creating positive impact within the communities we serve. In an era of economic uncertainty and social fragmentation, B2B marketers carry unique responsibility for building bridges, fostering understanding and creating value that includes but also extends beyond immediate commercial objectives.

The energy and optimism permeating Cannes this year reflected our industry's resilience and commitment to meaningful impact. As we return to our organizations, the challenge is translating these insights into systematic changes that elevate not just our brands, but our entire industry's contribution to society.

*...one of marketing's  
fundamental  
purposes: creating  
positive impact...*



# The Path Forward

The brands that will dominate in the B2B Decade will be those that master the psychology of collective buyer confidence while maintaining authentic human connection at scale. This requires fundamental shifts in how we organize, create and measure success.

The question isn't whether these changes will happen, but whether we'll lead or follow. The insights from Cannes provide the roadmap; the ability to act on them will determine who shapes the future of B2B marketing.



**The B2B opportunity has never been greater.  
The time to act is now.**

These insights represent Stein's initial observations from Cannes Lions B2B 2025. For deeper exploration of these themes and their application to your specific context, we welcome continued conversation.

In the Americas:  
[Jeremy.Cochran@steinb2b.com](mailto:Jeremy.Cochran@steinb2b.com)  
In EMEA or APAC:  
[Craig.Duxbury@steinb2b.com](mailto:Craig.Duxbury@steinb2b.com)