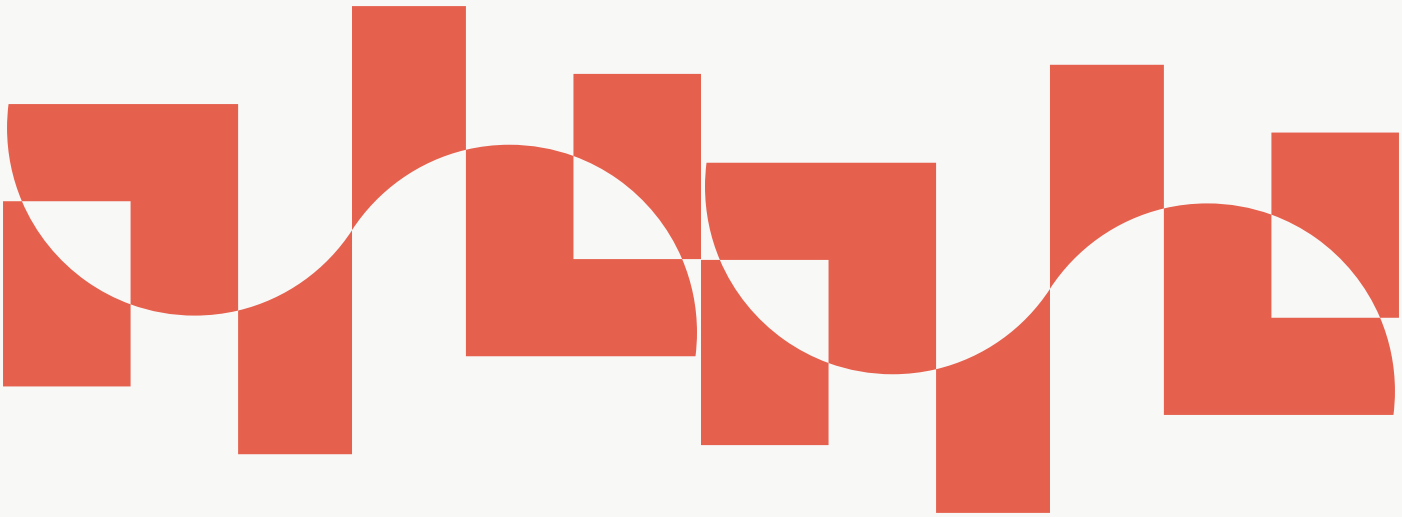
2027 / ANZ

B2B SALES & MARKETING LEADERS REPORT

Rethinking the B2B Buyer Experience: How Technology Is Reshaping Customer Journeys



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Executive Summary

Technology is reshaping how B2B organisations attract, engage and retain customers. Yet the central challenge for business leaders extends beyond adopting new technologies: it is determining how to integrate digital capabilities, human expertise and organisational processes to deliver superior customer experiences. Drawing on survey responses from 515 B2B professionals across Australia and New Zealand, this report identifies critical priorities for organisations seeking to strengthen customer engagement and commercial competitiveness.

Competing for customers increasingly requires influencing decisions before direct sales engagement. Pre-purchase activities accounted for 41.7% of coded customer touchpoint mentions in Australia and 39.6% in New Zealand. Respondents described buyers as increasingly self-directed, conducting independent research and forming expectations before engaging suppliers. For B2B organisations, this underscores the strategic importance of digital visibility, accessible information and educational content that helps buyers evaluate solutions early in their purchasing journeys. Organisations should therefore reassess where and how they create value before the first sales conversation.

Digital transformation requires more deliberate integration of technology and human interaction, rather than replacing one with the other. Predominantly digital engagement accounted for 60.7% of coded interaction-mode mentions in Australia and 51.3% in New Zealand. Nevertheless, respondents continued to emphasise human interaction for trust-building, consultation, negotiation and complex decision-making. The implication is that organisations should design customer journeys around the needs and complexity of specific interactions, enabling digital self-service where appropriate while ensuring access to human expertise when buyers require guidance, reassurance or collaborative problem-solving.

Technology priorities should be guided by customer needs and commercial objectives rather than adoption for its own sake. AI, automation, analytics and customer intelligence emerged as leading priorities in both markets, albeit with different emphases. Australian respondents placed relatively greater weight on AI-driven personalisation, automated customer journeys and business intelligence, while New Zealand respondents more frequently prioritised account intent and lead prioritisation, AI process automation and AI-enabled customer support. These differences highlight the importance of aligning technology decisions with specific organisational requirements and customer experience objectives, rather than pursuing a uniform approach to digital transformation.

Realising the potential of technology also requires rethinking workforce capabilities. Data and Analytical Skills accounted for the largest share of coded future-skill mentions among Marketing (22.3%) and Sales (19.8%) respondents, while AI and Automation Skills led among Product Management respondents (26.6%). At the same time, Sales respondents placed comparatively greater emphasis on communication, relationship-building and technical literacy. B2B leaders should therefore approach capability development as a combined technological and commercial challenge, equipping customer-facing teams to translate data and technological capabilities into meaningful customer interactions and decisions.

Delivering consistent customer experiences requires coordination across organisational functions. Respondents highlighted distinct but complementary contributions from Marketing, Sales and Product Management, alongside the importance of integrated customer information and coordinated engagement. This calls for greater alignment of customer objectives, technology systems and responsibilities across functions. Rather than optimising individual departments or touchpoints in isolation, organisations should prioritise the connections between them to reduce fragmentation and improve continuity throughout the customer journey.

Taken together, the findings point to a central strategic priority for B2B leaders: competitive advantage will increasingly depend not simply on technological sophistication, but on the ability to orchestrate technology, people and processes around evolving customer needs. Organisations that strengthen early-stage engagement, integrate digital and human interactions, develop complementary workforce capabilities and align customer-facing functions will be better positioned to respond to the expectations of increasingly informed and digitally enabled buyers.

Research Methodology

Data were collected through an online survey administered using Qualtrics between June 2025 and June 2026, with the majority of responses received during May and June 2026. Recruitment combined the initial research distribution with supplementary respondents recruited through Dynata's online research panel. The cross-sectional questionnaire included structured questions and open-ended response fields, analysed using qualitative thematic coding and descriptive quantification. The report's thematic figures are drawn from coded answers to these open-ended questions. Data collection generated 1,682 survey submissions. Respondents were retained if they completed the survey, confirmed that their role fell within the B2B marketing domain, and confirmed that their organisation focused most of its operations on Australia and/or New Zealand. After these screens and quality checks, 515 responses were retained for analysis. The final sample comprised respondents from Australia and New Zealand working across the Marketing, Sales, and Product Management functions within B2B organisations of varying sizes and across industry sectors. Respondents completed questions relating to technology adoption, customer experience management, customer journeys, organisational capabilities and future priorities within B2B environments.

Open-ended answers were thematically coded and quantified by theme mentions. Unless otherwise stated, percentages express the share of all coded theme mentions within the relevant question and comparison group (for example, Australian or Sales coded mentions). The figures therefore show the relative prominence of themes in the answers, not the prevalence of a particular view among respondents. Touchpoint figures in Section 4 represent the shares of all touchpoints named in each country, so the three journey stages sum to 100%. Country comparisons exclude the 3.7% of respondents in cross-region roles or who did not specify a country. Respondent quotes are reproduced verbatim apart from minor spelling and punctuation corrections, and are attributed by department, industry and country. Where a respondent selected "Other" for department or industry, their own description is used. For Figures 4.2-4.4, every category is expressed as a share of all named touchpoints in the relevant country, not just touchpoints within the stage, subjected to thematic analysis to identify recurring patterns across respondents.

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- Finja Sophie Pott, Exchange Student, University of Auckland Business School: Review and consolidation of coded responses, thematic analysis and quality assurance.
- Marketing Association of New Zealand (MA): Industry engagement and research promotion across New Zealand.
- Australian Marketing Institute (AMI): Professional network engagement and research promotion across Australia.
- The Marketing Club (TMC): Community engagement and participant recruitment.
- Firmable: Industry engagement, participant recruitment and research dissemination.

Key Findings at a Glance

Australia and New Zealand share AI priorities but prioritise investment differently

AI, Automation and Data Intelligence dominate future technology priorities in both markets, accounting for 70.6% of coded responses in Australia and 62.2% in New Zealand. The differences lie in what respondents would add to their technology stacks now. New Zealand respondents were more focused on Account Intent and Lead Prioritisation (24.9% versus 17.0%) and AI Process Automation (13.0% versus 3.9%). In comparison, Australian respondents placed more weight on AI-Driven Personalisation (13.1% versus 8.1%) and Business Intelligence and Performance Insight (7.8% versus 4.3%). Both markets identify AI among their desired capabilities; New Zealand coded mentions lean towards targeting and efficiency, and Australian mentions towards personalisation and insight.

Read more: Section 1.1 Technology and Section 2.3 B2B Organisations Are Responding Through Their Technology Stacks

Marketing, Sales and Product Management need different skill mixes

Future skill priorities differ across customer-facing teams. Data & Analytical Skills lead for both Marketing (22.3%) and Sales (19.8%) respondents. Beyond that shared base, Marketing respondents emphasised Digital Content & Marketing Skills (13.2%), Sales respondents gave around twice the weight Marketing did to Communication & Relationship Skills (15.4% versus 7.4%) and Technical & Digital Literacy (15.4% versus 8.3%), and Product Management respondents most strongly prioritised AI & Automation Skills (26.6%) and Technical & Digital Literacy (18.4%). These differences highlight the complementary roles different functions play in creating customer value.

Read more: Section 2.4 The Profile of the B2B Marketer and Seller Is Changing and 6. Marketing and Sales: Different Perspectives on Customer Experience

Digital self-service increasingly shapes the early stages of buying journeys

The pre-purchase stage accounts for the largest share of the touchpoints respondents named, representing 39.6% in New Zealand and 41.7% in Australia, ahead of purchase (34.4% and 34.1%) and post-purchase (26.0% and 24.2%). Respondents frequently highlighted brand awareness, online search, information discovery and educational content as key mechanisms through which buyers research and evaluate solutions independently. Respondents described customers forming preferences and shortlisting suppliers before engaging in direct sales.

Read more: Section 2.1 Technology Is Changing How B2B Customers Buy and Section 4.1 Touchpoints Across the Journey (Pre-Purchase)

Human interaction remains central to complex B2B decisions

Despite growing digital engagement, respondents continue to associate trust-building, solution evaluation and decision-making with direct human interaction. Asked which interactions should be digital and which in person, 47.0% of coded responses favoured digital channels, mainly for routine tasks and research; 31.4% favoured face-to-face interaction for complex decisions, trust-building and product evaluation; and 19.0% described a deliberately hybrid journey. Sales respondents were more likely to emphasise consultative engagement and relationship development, while digital channels were primarily associated with research, information access and routine transactions. The findings suggest that technology is changing the role of human engagement rather than replacing it.

Read more: Section 2.2 Buyer-Supplier Interactions Are Being Reconfigured and Section 4.2 Understanding the Role of Digital and Human Interaction

Expressed technology priorities are linked to customer experience objectives

Respondents consistently linked future technology investment to improvements in customer understanding, personalisation, and the effectiveness of engagement. Account Intent and Lead Prioritisation was the technology respondents most wanted to add now (24.9% in New Zealand, 17.0% in Australia), followed by AI-assisted content creation and AI-driven personalisation. Across Marketing, Sales and Product Management, AI, automation and data intelligence account for around two-thirds of future technology priorities (66.7% to 69.4%). Interest in these technologies was typically associated with improving customer outcomes rather than reducing human involvement in the customer journey.

Read more: Section 2.3 B2B Organisations Are Responding Through Their Technology Stacks and Section 3.2 Technologies Supporting B2B Customer Experience

Future skill requirements extend beyond traditional sales and marketing skills

Both technical and interpersonal skills emerged as critical priorities for future success. Data and Analytical Skills were the most-cited skill priority for both Marketing (22.3%) and Sales (19.8%) respondents, while AI and Automation Skills led for Product Management (26.6%). Communication and relationship skills remain essential, particularly for Sales (15.4%). Respondents indicated that future competitiveness would depend on professionals who can combine technological competence with customer-centric decision-making.

Read more: Section 1.2 People and Skills, Section 2.4 The Profile of the B2B Marketer and Seller Is Changing, and Section 5.1 Capability Themes

1. Understanding Today's B2B Commercial Landscape

The contemporary B2B landscape is characterised by increasing technology adoption, evolving customer expectations and growing pressure to integrate digital and human engagement throughout the customer journey. Analysis of responses from 515 B2B professionals across Australia and New Zealand indicates that respondents are prioritising technologies that improve customer understanding, enhance operational efficiency and support more personalised engagement.

The findings reveal important differences in how organisations approach these challenges. Australian respondents placed more weight on AI, automation and data intelligence (70.6% of future technology priorities, versus 62.2% in New Zealand). In comparison, New Zealand respondents more often prioritised broader technology and digital transformation (17.1% versus 9.6%). Functional differences were equally apparent. Data and Analytical Skills were the top skill priority for both Marketing (22.3%) and Sales (19.8%) respondents; Product Management respondents placed the strongest emphasis on AI and Automation Skills (26.6%), and Sales respondents gave Communication and Relationship Skills around twice the weight Marketing did (15.4% versus 7.4%).

Together, these findings provide a descriptive snapshot of coded themes of the technologies, capabilities and customer engagement practices shaping contemporary B2B organisations and establish the context for the thematic analysis that follows.

1.1 Technology

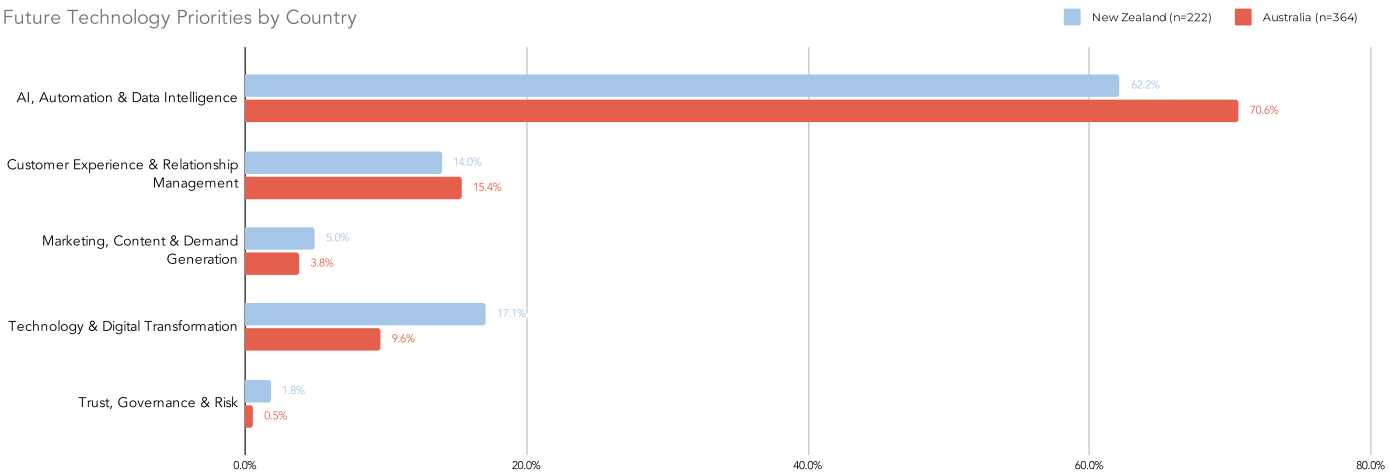


Figure 1.1. Future Technology Priorities by Country (share of coded mentions within country %)

Respondents described digital technologies as relevant across virtually every stage of the B2B customer journey. Respondents identified customer relationship management platforms, marketing automation systems, analytics tools, artificial intelligence applications, customer data platforms and digital communication technologies as central components of contemporary commercial operations.

The strongest technology priorities centre on improving decision quality and customer understanding rather than simply digitising existing processes. Artificial Intelligence, Automation and Data Intelligence dominated future technology priorities in both markets, accounting for 70.6% of coded responses in Australia and 62.2% in New Zealand. Customer Experience and Relationship Management technologies were cited at similar rates in both markets (15.4% in Australia, 14.0% in New Zealand), while New Zealand respondents more frequently highlighted Technology and Digital Transformation initiatives (17.1% versus 9.6%). These findings suggest broad agreement on the strategic importance of AI and data-driven decision-making, while highlighting differing approaches to technology investment and transformation.

The technologies respondents would like to introduce or further develop reinforce this trend. Automation, integrated customer data, AI-enabled decision support, and advanced analytics emerged consistently in both countries, suggesting interest in capabilities beyond basic digital adoption and an increasing focus on technologies that improve responsiveness, personalisation, and organisational agility.

This pattern suggests that technology is evolving from an operational support function into a strategic capability that can support customer experience, commercial decision-making and competitive differentiation. Recent research similarly argues that technology is increasingly enabling buyer-led journeys in which customer intelligence, digital engagement and integrated decision-support capabilities become central sources of commercial value (Kalwey et al., 2025).

1.2 People and Skills

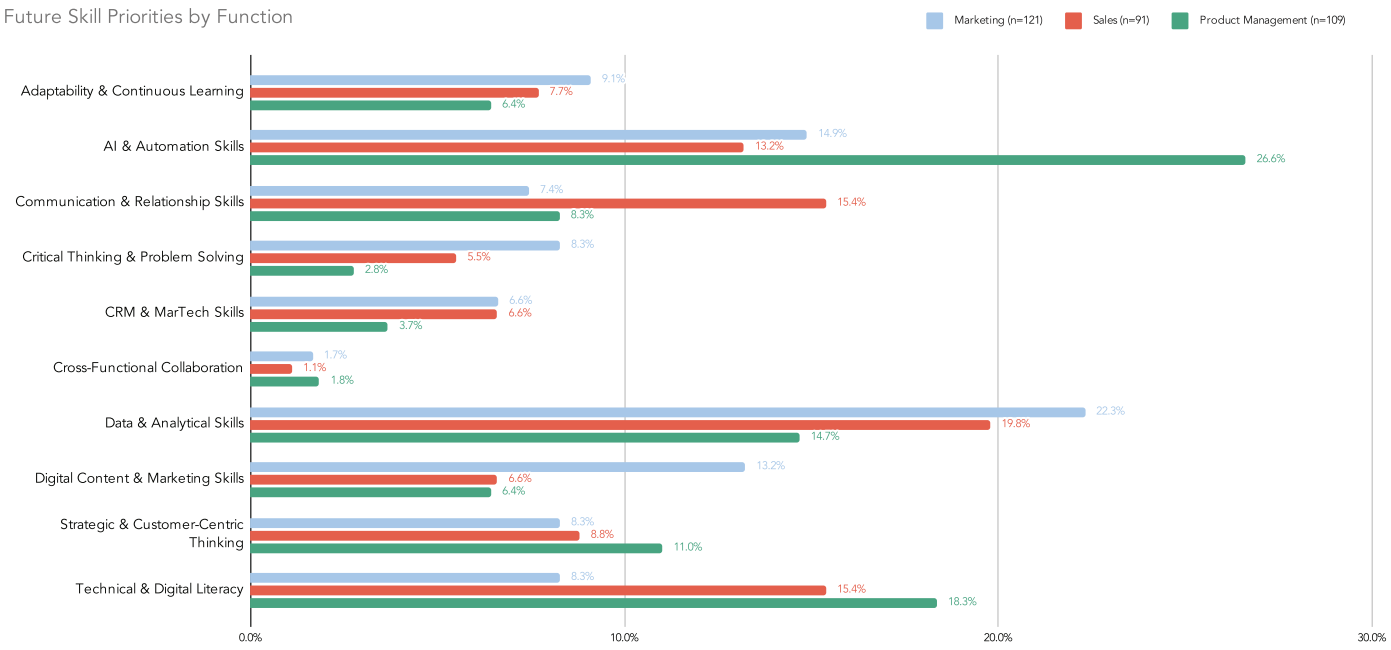


Figure 1.2. Future Skill Priorities by Function (share of coded skill mentions within function %)

Technology investment alone does not create commercial value. Respondents consistently linked successful technology adoption with an organisation's ability to develop the skills required to interpret data, generate insights and apply emerging technologies effectively.

Across all functions, respondents identified growing demand for data literacy, analytical capability, digital proficiency and AI-related knowledge. At the same time, communication, collaboration, customer understanding and relationship management remained among the most frequently cited requirements for future success. Rather than replacing traditional commercial skills, respondents continue to value these capabilities alongside technological change by placing greater emphasis on translating data and insights into meaningful customer outcomes.

Differences also emerged across organisational functions. Marketing respondents most frequently highlighted Data and Analytical Skills (22.3%) and Digital Content and Marketing Skills (13.2%), reflecting the growing importance of customer insights and performance optimisation. Sales respondents also ranked Data and Analytical Skills first (19.8%), followed by Communication and Relationship Skills (15.4%) and Technical and Digital Literacy (15.4%), reinforcing the continued importance of customer engagement within increasingly technology-enabled environments. Product Management respondents most strongly prioritised AI and Automation Skills (26.6%) and Technical and Digital Literacy (18.4%), highlighting the growing role of technology innovation and automation in future commercial success.

Taken together, these responses highlight the potential value of developing hybrid capabilities that combine technological expertise with customer-centred commercial skills. Data and Analytical Skills were the highest priority for both Marketing (22.3%) and Sales (19.8%) respondents, and AI and Automation Skills for Product Management respondents (26.6%), yet Sales respondents also gave Communication and Relationship Skills around twice the weight Marketing respondents did (15.4% versus 7.4%). These responses suggest that organisations may benefit from combining technology, data and customer engagement capabilities rather than focusing exclusively on technical expertise.

1.3 Processes and Customer Interaction

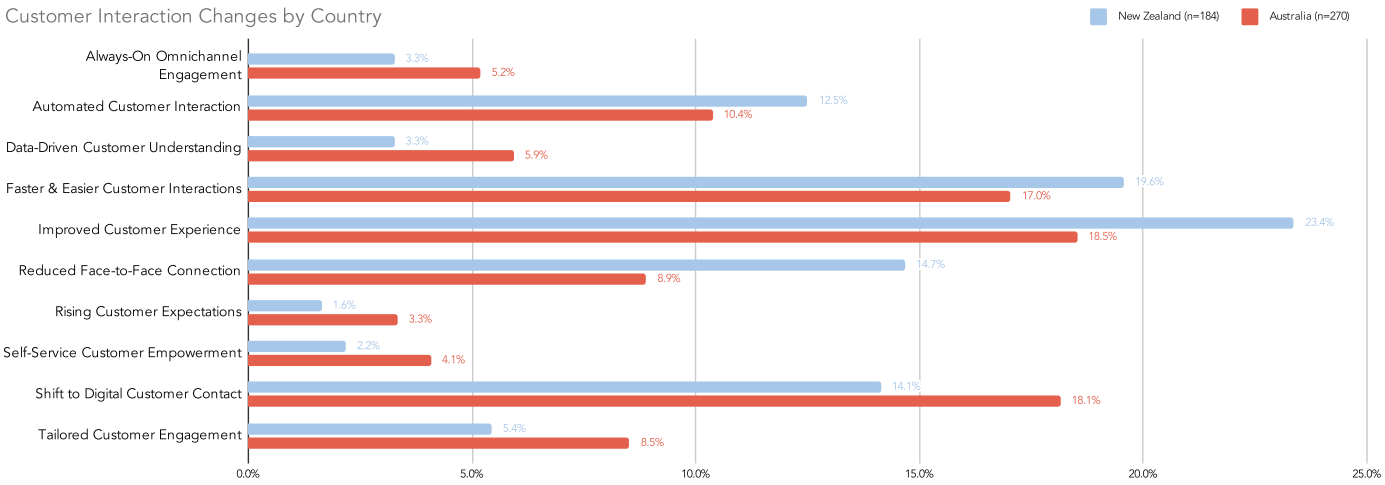


Figure 1.3. Customer Interaction Changes by Country (share of coded mentions within country %)

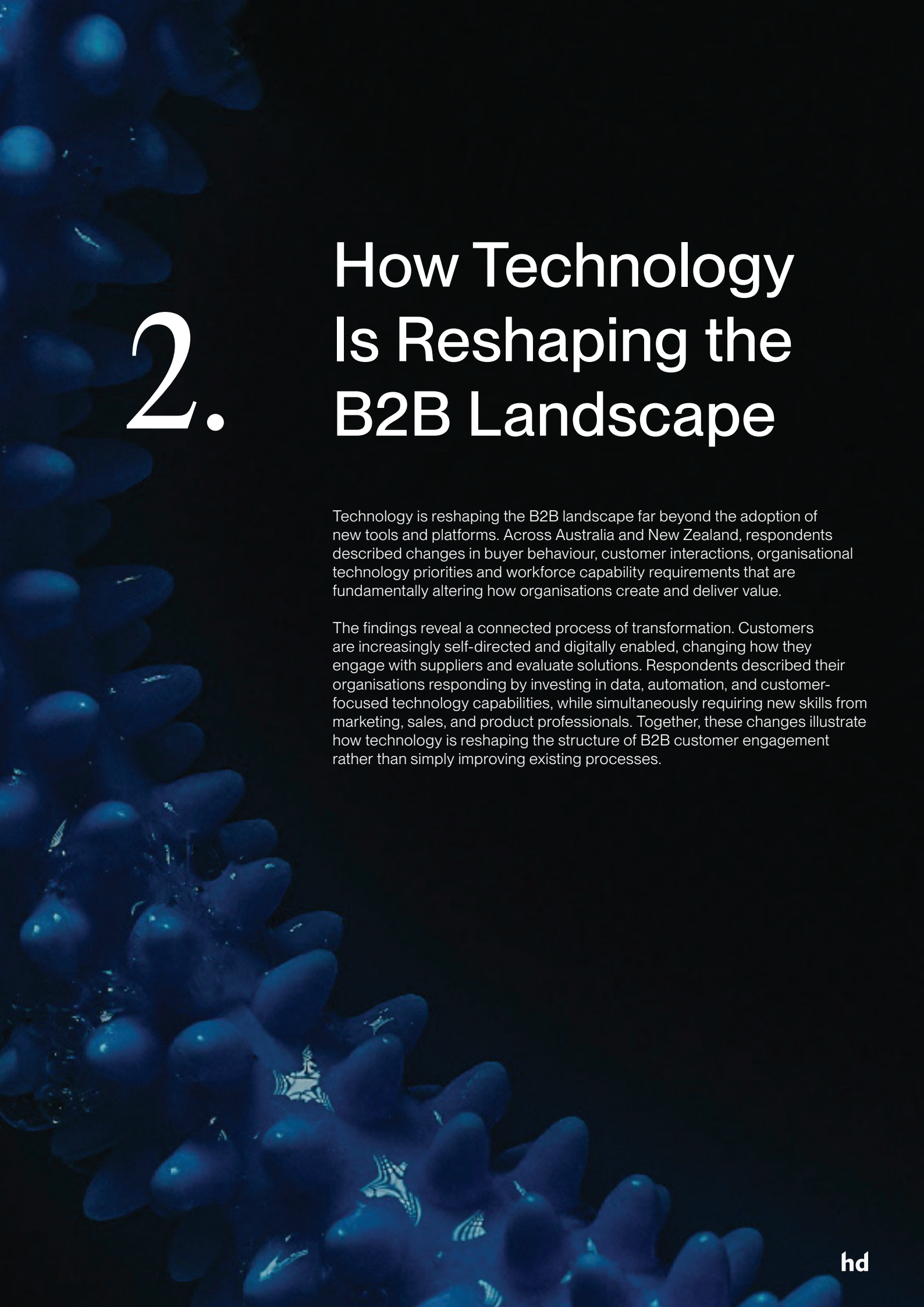
Respondents described customer engagement as distributed across digital and human channels. Respondents described customers conducting extensive independent research, comparing suppliers online and accessing information through digital platforms before engaging directly with organisational representatives.

Digital channels were most frequently associated with information gathering, supplier evaluation, routine enquiries and transactional interactions. Human engagement remained most valuable when customers required strategic advice, tailored solutions, complex negotiation or relationship development. Rather than competing with one another, digital and interpersonal interactions perform complementary roles throughout the customer journey.

Country-level differences indicate variation in how organisations interpret these changing interaction patterns. Australian respondents most frequently associated technology-enabled interactions with Faster and Easier Customer Interactions (17%), a Shift to Digital Customer Contact (18.2%), and Improved Customer Experience (18.5%). New Zealand respondents similarly highlighted Improved Customer Experience (23.4%) and Faster and Easier Customer Interactions (19.6%), while placing greater emphasis on Automated Customer Interaction (12.5% versus 10.4%) and Reduced Face-to-Face Connection (14.7% versus 8.9%). These findings suggest that both markets are becoming increasingly digital and that New Zealand respondents are more likely to see technology reducing face-to-face contact, even though, as Section 2.2 shows, they still describe more balanced, in-person interaction models than Australian respondents.

These accounts portray the customer journey as hybrid and non-linear. This pattern aligns with recent B2B research suggesting that customers move between digital and human touchpoints according to their information requirements, confidence needs, and stage of the buying process, rather than following a fixed, sequential journey (De Keyser et al., 2025; Lundin & Kindström, 2024). Customers increasingly engage across multiple channels and revisit stages of the journey as new information becomes available, creating greater demand for organisations to coordinate interactions across functions while maintaining consistency throughout the customer experience.

The customer touchpoints identified by respondents reinforce this requirement. Critical moments now occur across websites, digital platforms, sales conversations, support interactions and ongoing relationship management activities. Organisations that successfully integrate these touchpoints are better positioned to deliver seamless customer experiences and respond to increasingly complex buyer expectations.



2. How Technology Is Reshaping the B2B Landscape

Technology is reshaping the B2B landscape far beyond the adoption of new tools and platforms. Across Australia and New Zealand, respondents described changes in buyer behaviour, customer interactions, organisational technology priorities and workforce capability requirements that are fundamentally altering how organisations create and deliver value.

The findings reveal a connected process of transformation. Customers are increasingly self-directed and digitally enabled, changing how they engage with suppliers and evaluate solutions. Respondents described their organisations responding by investing in data, automation, and customer-focused technology capabilities, while simultaneously requiring new skills from marketing, sales, and product professionals. Together, these changes illustrate how technology is reshaping the structure of B2B customer engagement rather than simply improving existing processes.

2.1 Technology Is Changing How B2B Customers Buy

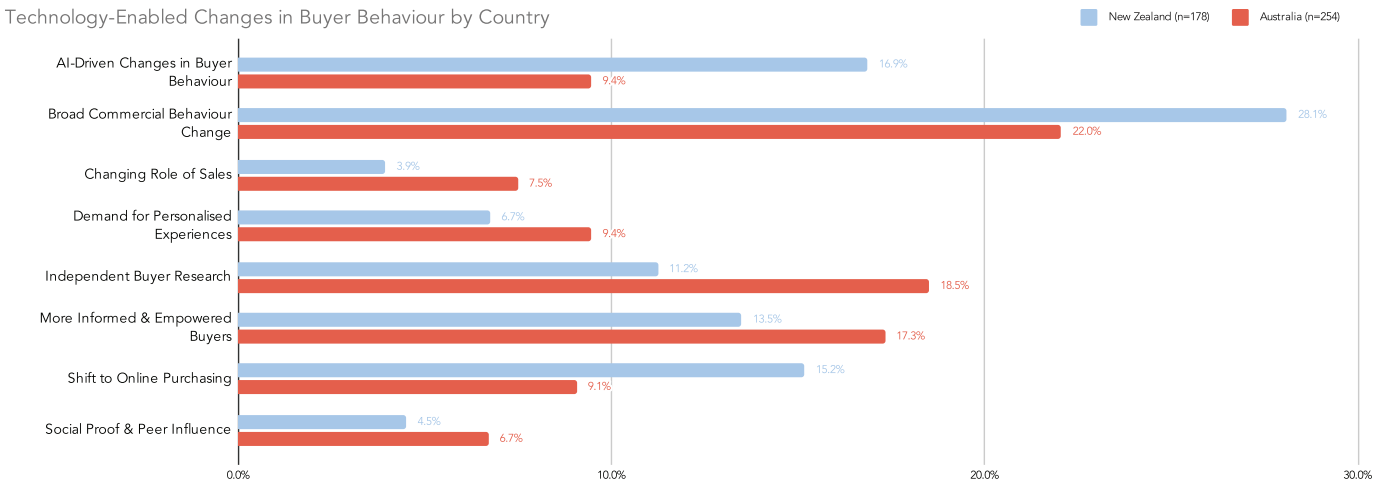


Figure 2.1. Technology-Enabled Changes in Buyer Behaviour by Country (share of coded mentions within country %)

Survey respondents described B2B buyers researching, evaluating and shortlisting suppliers before engaging directly with sales teams. Respondents across both Australia and New Zealand described customers as more informed, independent and digitally enabled than in the past, with technology providing unprecedented access to information throughout the buying process.

Australian respondents most frequently associated technology-enabled changes in buyer behaviour with Broad Commercial Behaviour Change (22.1%), Independent Buyer Research (18.5%), and More Informed and Empowered Buyers (17.3%). These findings suggest that Australian respondents view technology as reshaping how customers gather information, evaluate alternatives and participate in purchasing decisions. New Zealand respondents similarly identified Broad Commercial Behaviour Change (28.1%) as the dominant theme but placed greater emphasis on AI-Driven Changes in Buyer Behaviour (16.9%) and Shift to Online Purchasing (15.2%). Together, these coded themes suggest that respondents perceive buyers as more informed and digitally enabled, with greater scope to progress independently before engaging directly with suppliers.

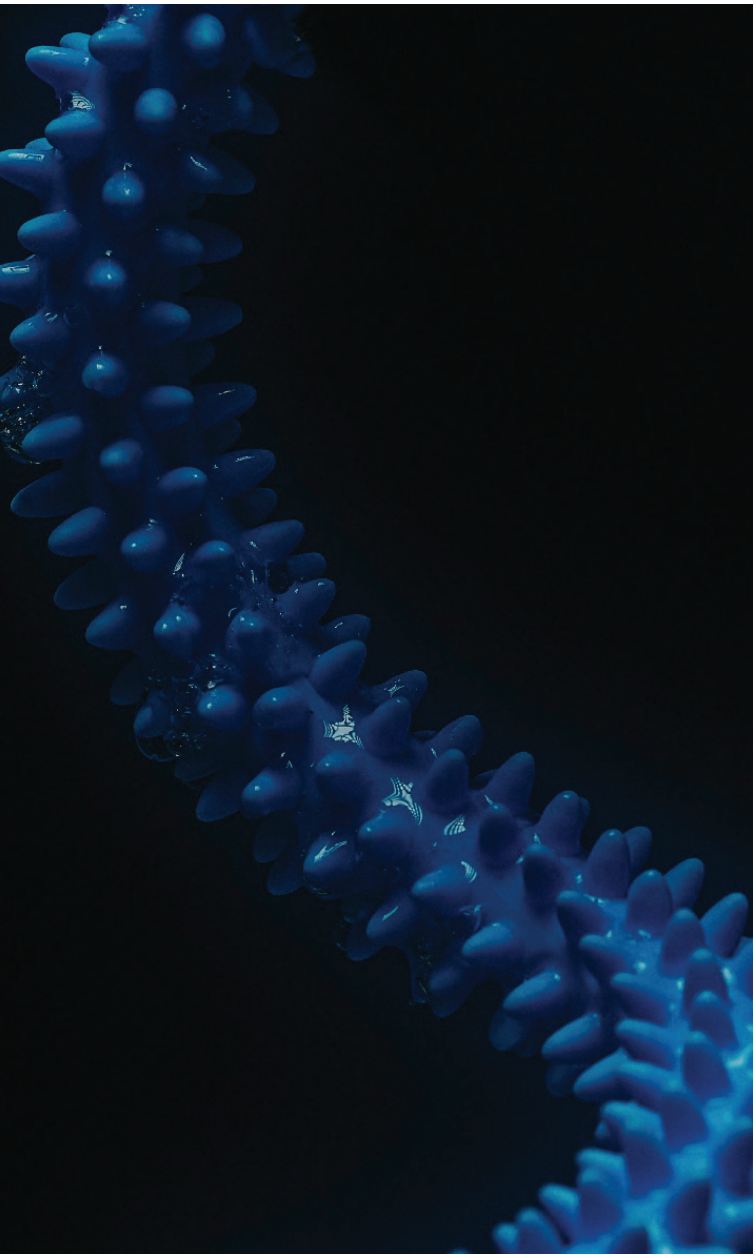
Across both markets, broad commercial behaviour change, independent buyer research and more informed buyers emerged as the dominant buyer-behaviour themes, consistent with respondents' descriptions of self-directed and digitally enabled purchasing journeys.

This finding aligns with recent B2B research suggesting that buying journeys are becoming increasingly buyer-led, with customers conducting substantial information gathering, supplier evaluation and solution comparison before engaging directly with vendors (Kalwey et al., 2025). Customers increasingly control how, when and through which channels they engage with suppliers, reducing reliance on seller-directed purchasing processes.

Easy access to information is also changing how customers evaluate suppliers. Customers can readily compare products, services and providers through websites, digital content, reviews and industry information sources. As a result, buyers often enter supplier conversations with stronger opinions, clearer expectations and greater awareness of available alternatives.

Differences also emerge across organisational functions. Marketing and Product Management respondents most frequently described customers as independent researchers who gather information before contacting suppliers. Sales respondents placed greater emphasis on the consequences of this behaviour, particularly the shift towards later-stage engagement and the growing prevalence of digitally enabled purchasing journeys.

This perceived shift places greater emphasis on earlier stages of the customer journey. Organisations increasingly need to establish credibility, provide value and support buyer decision-making before direct sales engagement occurs. Visibility, discoverability and access to relevant information therefore play a greater role in shaping purchase decisions than in traditional linear buying models. This observation is consistent with emerging evidence that customer influence is increasingly shaped during independently managed phases of the buying process rather than through direct salesperson interaction (Kalwey et al., 2025).



> We have more customers purchasing online than before. 5 years ago majority of our clients bought over the phone or through seeing reps face to face, now the majority of our customers buy through our website.

Sales Department, Food & Beverage Industry, Australia

2.2 Buyer-Supplier Interactions Are Being Reconfigured

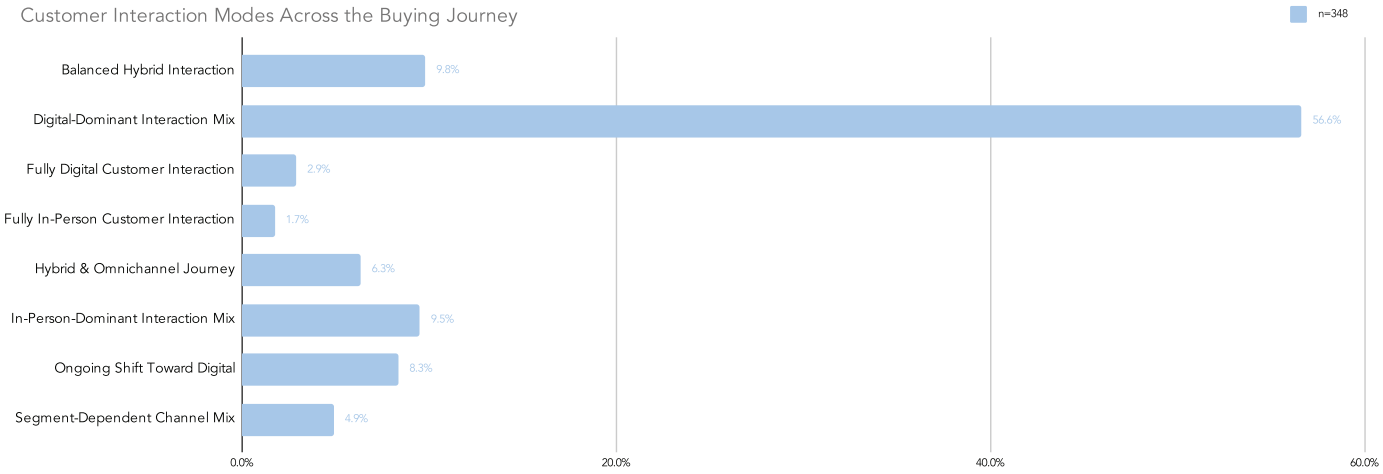


Figure 2.2. Customer Interaction Modes Across the Buying Journey (share of coded interaction-mode mentions %)

Technology is changing not only how customers buy, but also how customers and suppliers interact throughout the buying process. Respondents consistently described a hybrid engagement model in which digital and human channels perform distinct yet complementary roles.

Digital interactions were most associated with research, information gathering, product comparison, routine enquiries, updates and transactions. These channels enable customers to access information when needed and progress through parts of the buying process independently. Human interaction remains concentrated around activities involving complexity, risk, negotiation, strategic discussion and relationship development. Recent B2B research similarly suggests that customers increasingly combine digital and human interactions throughout their journeys, selecting engagement channels based on the task at hand rather than following a predefined interaction sequence (Lundin & Kindström, 2024).

Marketing respondents placed greater emphasis on digital discovery and information access, reflecting the growing importance of digital channels during the early stages of the customer journey. Product Management respondents similarly highlighted the role of technology in supporting information search and customer self-service. Sales respondents were more likely to emphasise the continued importance of direct interaction, particularly when customers require guidance, expertise or reassurance during complex purchasing decisions.

Country-level differences reinforce this pattern. Predominantly digital engagement accounted for 60.7% of coded interaction-mode mentions in Australia, compared with 51.3% in New Zealand. Balanced hybrid

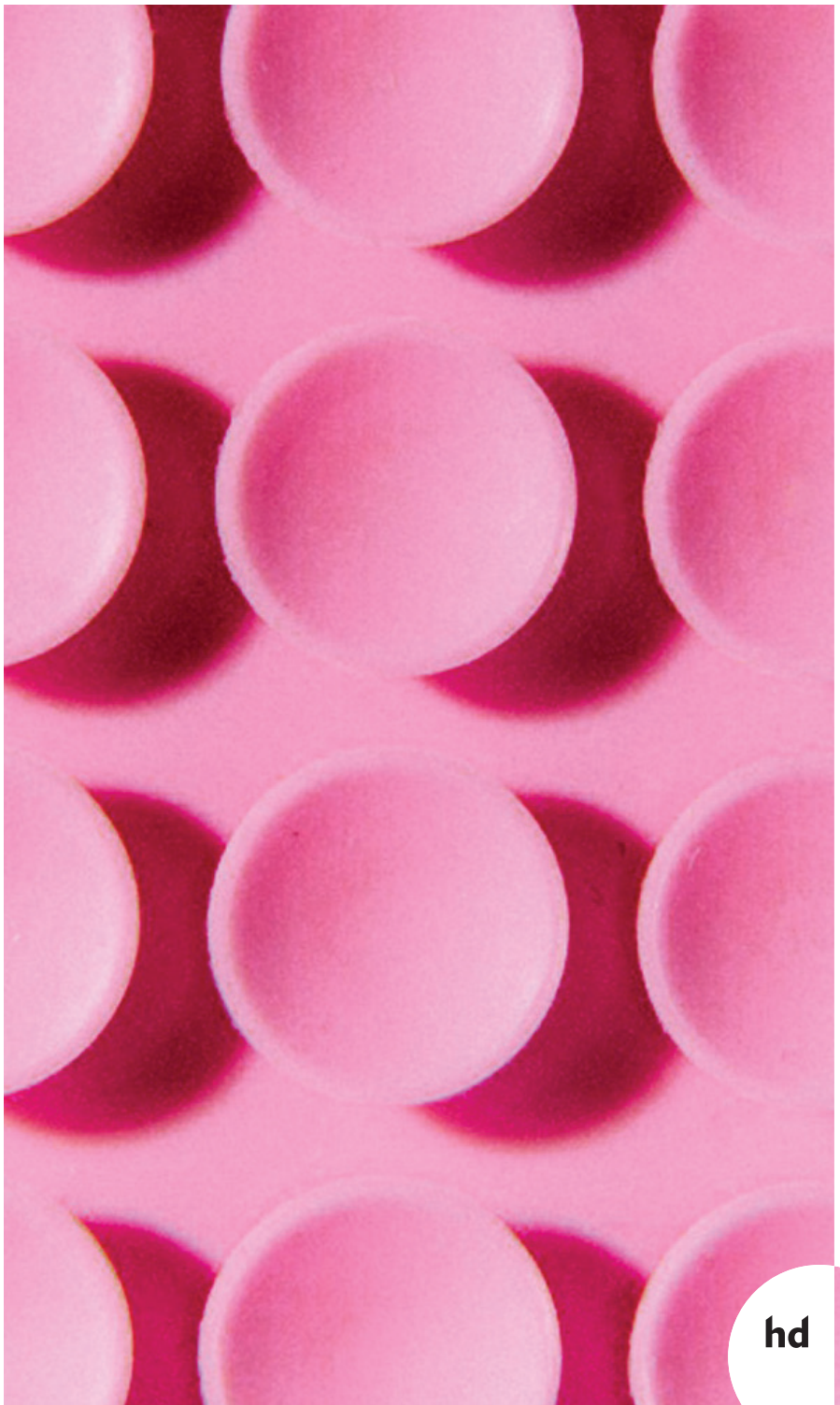
interaction (12.5%) and in-person-dominant engagement (11.8%) represented greater shares of coded NZ interaction-mode mentions than of Australian mentions (7.6% and 7.6%, respectively). These findings suggest that both markets are embracing digital engagement, although New Zealand organisations continue to place greater emphasis on relationship-oriented interactions. Despite these differences, respondents in both countries strongly supported a hybrid model that combines digital convenience with human expertise.

These findings align with growing evidence that contemporary B2B customer journeys rely on the complementary strengths of both digital and interpersonal engagement. Digital channels provide access to information, convenience, and efficiency, while direct interaction remains important where trust, expertise, and collaborative decision-making are required (De Keyser et al., 2025; Lundin & Kindström, 2024).

Respondents' accounts suggest that human engagement remains particularly valued at moments requiring judgement, reassurance and relationship-building, alongside growing use of digital channels.

The distinction is no longer whether customer engagement should be digital or human. Organisations increasingly need to determine which interactions customers prefer to complete independently and which require direct involvement from customer-facing teams. Customer experience increasingly depends on aligning engagement channels with customer needs at each stage of the journey.

> "Touchpoints move from digital and automated (Marketing) in the early stages to personal and consultative (Sales/ Customer Success) as the deal progresses.
>
> Information Technology Department,
> IT & Technology Industry, Australia



2.3 B2B Organisations Are Responding Through Their Technology Stacks

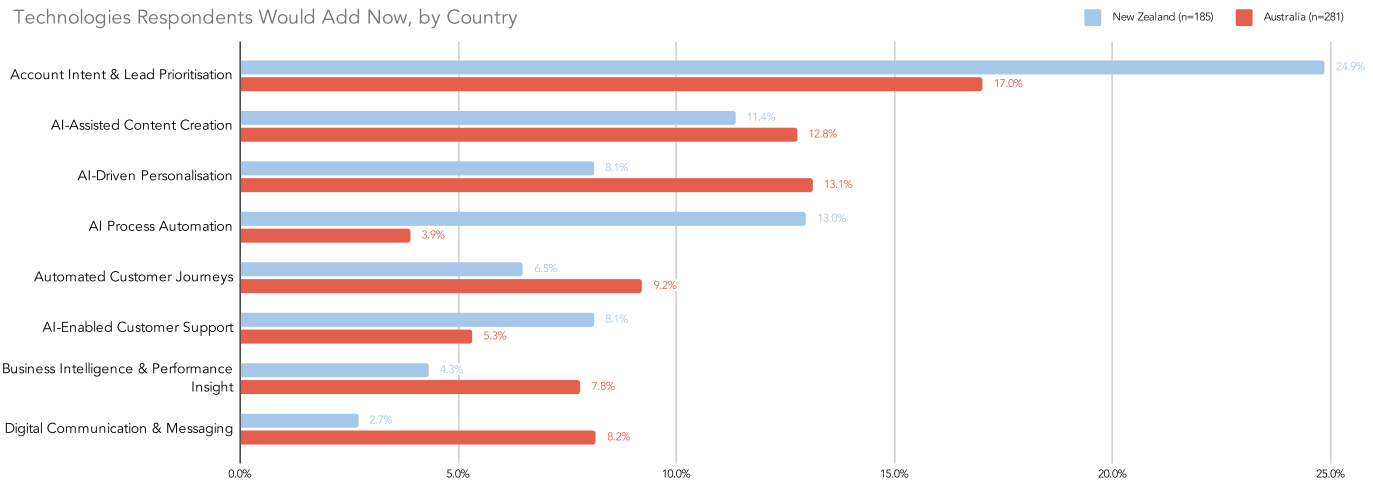


Figure 2.3. Technologies Respondents Would Add Now, by Country (selected leading themes; share of coded mentions within country %)

When describing desired additions to their technology stacks, respondents emphasised connected capabilities for customers, data, and decision-making rather than standalone tools. Respondents consistently linked future technology priorities to improving customer understanding, enabling more personalised engagement and supporting commercial decision-making.

The technologies respondents would add to their stack immediately, if they had the opportunity, reveal both shared priorities and important differences between the two markets. Account Intent and Lead Prioritisation emerged as the largest category in both countries, accounting for 24.9% of coded responses in New Zealand and 17.0% in Australia, highlighting the growing importance of identifying and targeting high-value opportunities more effectively. Australian respondents placed greater emphasis on AI-Driven Personalisation (13.1% versus 8.1%), Automated Customer Journeys (9.2% versus 6.5%) and Business Intelligence and Performance Insight (7.8% versus 4.3%), reflecting a stronger focus on data-driven customer engagement and commercial decision-making. New Zealand respondents were more likely to prioritise AI Process Automation (13.0% versus 3.9%) and AI-Enabled Customer Support (8.1% versus 5.3%), suggesting a greater emphasis on operational efficiency and service enhancement.

Figure 2.3 shows that respondents' preferred technology additions concentrate on customer understanding, engagement effectiveness and decision quality. While specific priorities differ between countries, respondents consistently linked future technology investment to the creation of more intelligent, responsive, and customer-focused operating environments

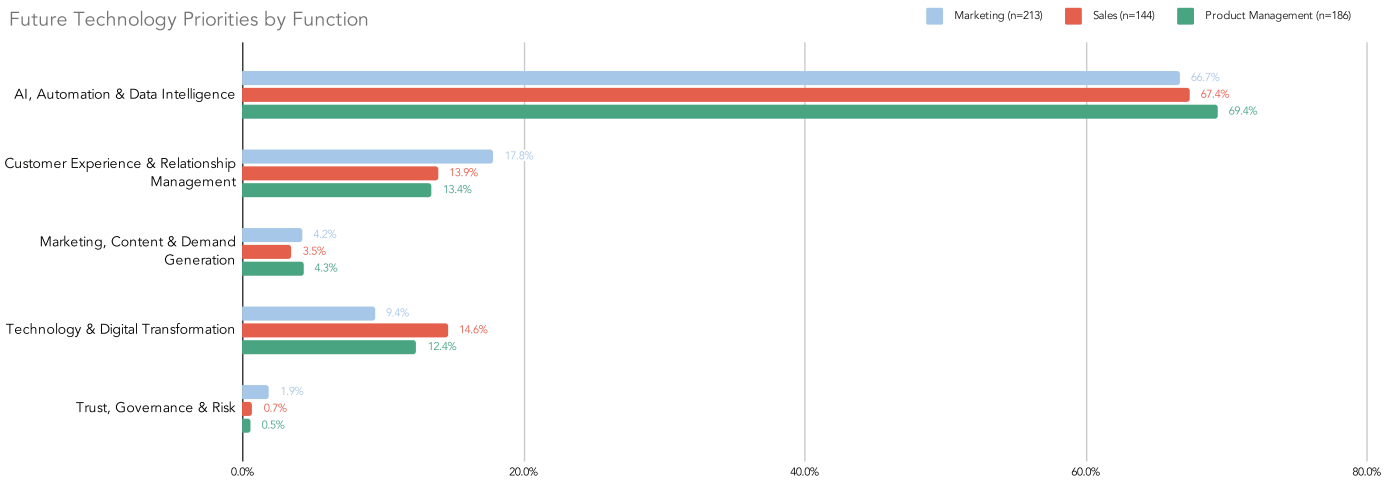


Figure 2.4. Future Technology Priorities by Function (share of coded mentions within function %)

The prominence of desired technology additions focused on customer understanding and engagement is particularly evident in the strong emphasis on AI-enabled technologies. Beyond lead prioritisation, respondents identified AI-Assisted Content Creation as an expressed area for investment, accounting for 11.4% of coded responses in New Zealand and 12.8% in Australia. Interest in AI-Driven Personalisation, Automated Customer Journeys and AI-Enabled Customer Support further demonstrates the growing use of AI to improve customer relevance, engagement effectiveness and operational performance.

A recurring theme across both markets was the growing importance of connected data. Respondents frequently associated future competitiveness with the ability to integrate information across systems, improve customer visibility and generate insights that support decision-making. As customer journeys become more complex and span multiple channels, fragmented technology environments create increasing barriers to delivering consistent customer experiences.

The coded priorities suggest interest in technologies that provide insight and decision support, beyond infrastructure alone. Organisations are increasingly interested in technologies that generate insights, automate routine activities, improve targeting and support personalisation. Interest in analytics, automation and AI-enabled capabilities reflects this broader movement towards data-driven customer engagement.

Artificial intelligence emerged as a major area of focus across all functions. AI, Automation and Data Intelligence accounted for 66.7% of future technology priorities among Marketing respondents, 67.4% among Sales respondents, and 69.4% among Product Management respondents, making it the dominant technology category across the entire sample. Marketing respondents highlighted opportunities to improve segmentation, personalisation, and campaign effectiveness, while Sales respondents focused on lead prioritisation, customer intelligence, and productivity improvements. Product Management respondents placed particular emphasis on AI-driven innovation and on developing future digital capabilities. Similar trends have been identified in recent B2B research, which argues that AI-enabled capabilities increasingly support customer insight generation, interaction orchestration and buyer engagement throughout the customer journey (Kalwey et al., 2025).

Respondents frequently described desired technologies in terms of commercial outcomes. Rather than evaluating technologies solely on functionality, respondents considered how effectively they can improve customer experience, increase efficiency, and support commercial objectives.

2.4 The Profile of the B2B Marketer and Seller Is Changing

Technology is redefining the skills required of marketing, sales and product professionals. Respondents consistently identified skill development as a critical requirement for future competitiveness, reflecting the growing integration of technology, data and analytics into everyday commercial activities.

Data literacy, analytical thinking, digital skills and AI-related skills were frequently identified as future requirements across all functional groups. The growing availability of customer data and increasing reliance on technology-enabled decision-making mean that employees are expected to understand, interpret and apply information more effectively than in the past.

The specific skills emphasised varied across organisational functions (see Figure 1.2). Marketing respondents most frequently identified Data and Analytical Skills (22.3%) and Digital Content and Marketing Skills (13.2%) as future priorities, reflecting the growing importance of insight generation and engagement optimisation. Product Management respondents placed the strongest emphasis on AI and Automation Skills (26.6%) and Technical and Digital Literacy (18.4%), highlighting the increasing importance of emerging technologies and innovation. Sales respondents ranked Data and Analytical Skills first (19.8%). Still, they gave Communication and Relationship Skills (15.4%) and Technical and Digital Literacy (15.4%) more weight than Marketing respondents, demonstrating that customer-facing skills remain essential even as commercial environments become more technology-enabled.

Differences also emerged between Australia and New Zealand. Australian respondents more frequently associated future success with Data and Analytical Skills (24.1% versus 11.6%) and CRM and MarTech Skills (7.0% versus 2.7%). In comparison, New Zealand respondents placed relatively greater emphasis on Communication and Relationship Skills (13.6% versus 7.5%) and Technical and Digital Literacy (17.7% versus 12.1%). Despite these differences, respondents in both countries identified technological literacy and customer-centred capabilities as essential requirements for future competitiveness.

Technology is not reducing the value of human expertise. Respondents consistently described communication, collaboration, problem-solving and relationship management as essential capabilities within an increasingly digital environment. As routine activities become more automated and information becomes more accessible, professionals are expected to contribute greater strategic value, customer understanding and commercial judgement.

This finding reinforces a recurring theme throughout the report: technology is changing the nature of commercial work rather than replacing it. As digital tools become more sophisticated, the ability to interpret information, exercise judgement, build trust and navigate customer complexity becomes increasingly valuable. Recent research similarly argues that future commercial success depends on combining technology-enabled capabilities with human-centred skills that support collaboration, problem-solving and customer value creation (Kalwey et al., 2025).

The most effective B2B professionals are therefore likely to be those who can integrate technology, data and human-centred engagement into a single approach to customer and commercial decision-making. Organisations that align skill development with evolving technology requirements will be better positioned to respond to changing customer expectations and increasingly complex buying environments.

Integrative Storyline

The findings reveal a connected chain of change across the contemporary B2B landscape.

Respondents described technology as enabling more independent research, supplier evaluation and buyer-led engagement. Pre-purchase activities accounted for 41.7% of the customer journey touchpoints respondents named in Australia and 39.6% in New Zealand, highlighting the prominence of early-stage activities within the touchpoints named, rather than measuring how influence is distributed across actual journeys. These changes are reshaping buyer-supplier interactions, increasing demand for hybrid engagement models that combine digital convenience with human expertise. Organisations are therefore under growing pressure to establish visibility, credibility and customer value before direct sales engagement occurs.

Respondents described organisations as responding by investing in data, automation, analytics, and artificial intelligence to improve customer understanding and support more informed decision-making. As these technology environments become more sophisticated, marketing, sales and product professionals require new capabilities that combine technological literacy with customer-facing commercial skills.

Technology-enabled changes in buyer behaviour

→ reshape how and where buyers interact with suppliers

→ drive investment in more connected and intelligent technology ecosystems

→ redefine the capabilities required of B2B marketing, sales and product professionals

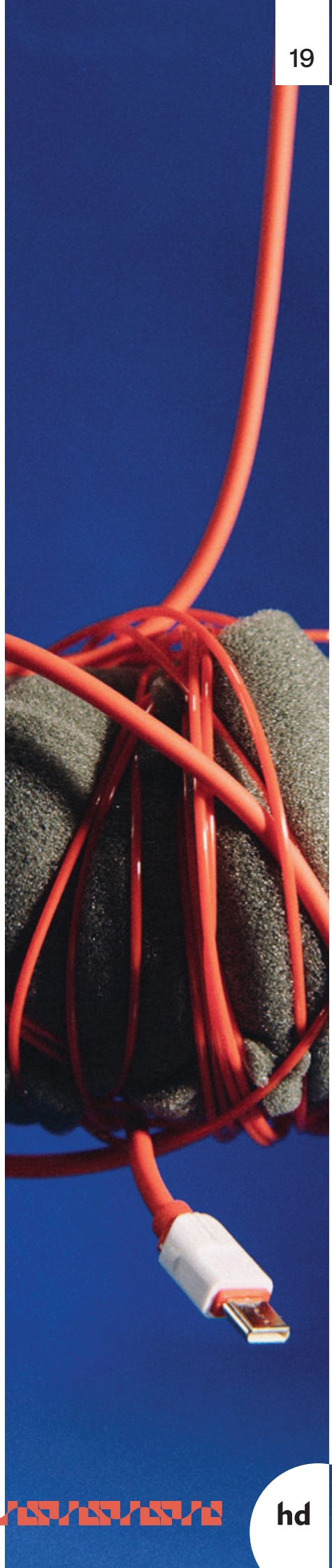
Together, these findings suggest that respondents see technology as influencing not only the tools organisations use, but also changes in buying, engagement and value creation. The transformation is increasingly characterised by buyer-led journeys, technology-enabled decision-making and greater coordination between digital and human forms of engagement, reflecting broader shifts identified in contemporary B2B research (Kalwey et al., 2025; De Keyser et al., 2025).

> “There is more focus on agentic AI as a skill set which is somewhat useful but also risks dumbing down first principles of good marketing practice.

Sales Department, IT & Technology Industry, Australia

Implications for B2B Leaders

Assess where digital tools improve discovery, information access and responsiveness, and where human expertise remains important. Evaluate AI and automation within a broader technology and capability strategy rather than as standalone investments.



3. How to Build B2B Customer Experience

Customer experience is widely regarded as a potential source of differentiation in B2B markets. Respondents consistently linked successful customer experiences to the ability to combine effective interactions, integrated technology and cross-functional coordination throughout the customer lifecycle.

The findings indicate that a single touchpoint, channel, or department does not determine the customer experience. Instead, it emerges from the combined effect of how organisations engage customers, the technologies that support those interactions and the organisational structures that coordinate customer-facing activities. Differences across countries and organisational functions suggest that firms may prioritise these elements differently. Still, respondents consistently viewed customer experience as a shared organisational outcome rather than an isolated functional responsibility. This finding aligns with recent B2B customer experience research, which increasingly positions customer experience as the outcome of coordinated interactions across multiple organisational functions, technologies and customer touchpoints (De Keyser et al., 2025).

This section examines three dimensions of B2B customer experience: interaction design, supporting technologies and organisational ownership.

3.1 How Firms Interact with Their Customers

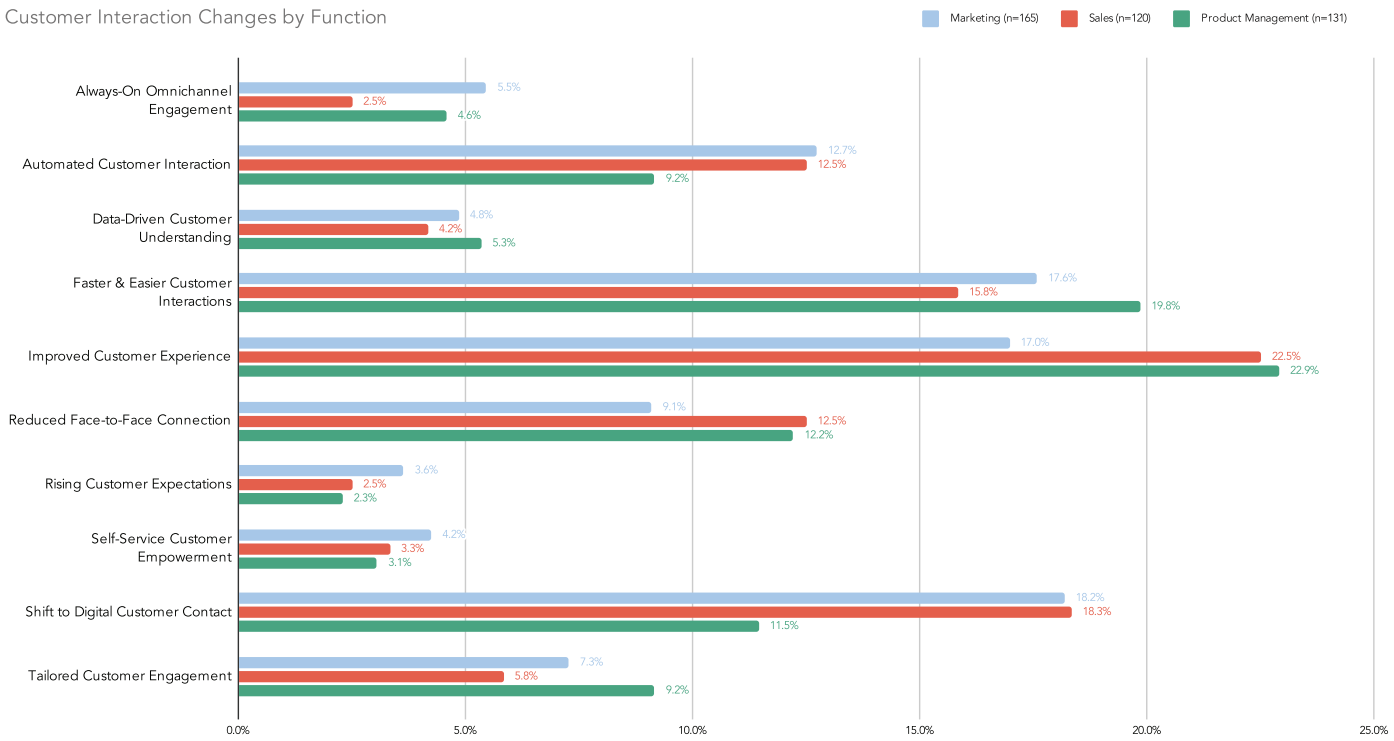


Figure 3.1. Customer Interaction Changes by Function (share of coded mentions within function %)

Respondents often characterised the B2B customer experience as a hybrid interaction model that combines digital convenience with human expertise.

Respondents consistently described customers moving between digital and personal channels based on the complexity of their needs, the stage of the buying process, and the value of the decision.

Marketing and Sales respondents were equally likely to identify a shift towards digital customer contact as a key change in customer interaction (18.2% and 18.3%), compared with 11.5% of Product Management respondents. Marketing respondents also highlighted faster, easier interactions (17.6%) and an improved customer experience (17.0%). Product Management respondents most often associated technology with improved customer experience (22.9%) and with faster, easier customer interactions (19.9%), reflecting a focus on reducing friction and enhancing customer convenience.

Sales respondents most frequently associated technology-enabled interaction with improved customer experience (22.5%), a shift to digital customer contact (18.3%) and faster and easier customer interactions (15.8%) and were as likely as Product Management respondents to report reduced face-to-face connection (12.5% and 12.2%, versus 9.1% for Marketing). In their open-ended answers, however, Sales respondents continued to stress direct engagement in complex decision-making, negotiation, and relationship development, viewing personal interaction as particularly valuable when uncertainty, risk, or strategic considerations are involved.

These findings reinforce the emergence of hybrid customer journeys. Customers increasingly expect digital channels to provide speed, accessibility and self-service capabilities, while human interaction remains critical when decisions require judgement, consultation and trust. Contemporary B2B research similarly suggests that customers move between digital and human touchpoints according to task requirements rather than remaining within a single interaction channel throughout the customer journey (Lundin & Kindström, 2024).

The findings suggest that customer experience depends less on individual channels and more on an organisation's ability to integrate digital and human interactions into a coherent and consistent customer journey.

3.2 Technologies Supporting B2B Customer Experience

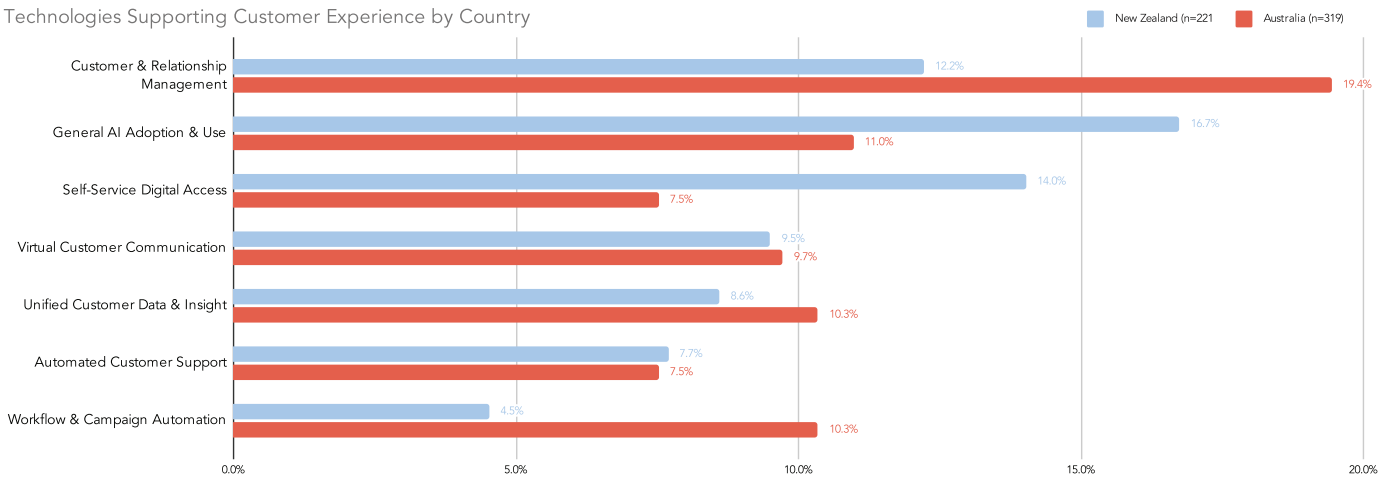


Figure 3.2. Technologies Supporting Customer Experience by Country (share of coded mentions within country %)

Respondents frequently associated a better customer experience with the ability to integrate customer information, communication processes, and engagement activities through technology. Respondents consistently identified integrated technology environments as a prerequisite for delivering consistent customer experiences across multiple channels and touchpoints.

Customer and Relationship Management technologies were the most frequently cited customer experience technology in Australia (19.4% of coded responses, versus 12.2% in New Zealand). In New Zealand, General AI Adoption and Use led (16.7%, versus 11.0% in Australia), highlighting the growing role of AI-enabled capabilities in supporting customer engagement and decision-making.

Respondents also highlighted the growing importance of self-service and customer communication technologies. Self-Service Digital Access capabilities accounted for 14.0% of responses in New Zealand and 7.5% in Australia, while Virtual Customer Communication technologies represented 9.7% in Australia and 9.5% in New Zealand. Australian respondents were more likely to cite Workflow and Campaign Automation (10.3% versus 4.5%). These technologies enable customers to access information, engage with organisations and complete routine activities with reduced effort and increased convenience.

Artificial intelligence also emerged as an increasingly important component of customer experience capability. Respondents associated AI with personalisation, content creation, customer support, analytics and automation. Rather than replacing customer-facing activities, AI was most often discussed as a mechanism for improving customer understanding, enabling more relevant engagement and supporting more informed decision-making.

Many responses did not focus on individual technologies in isolation. Instead, respondents described customer experience as emerging from connected technology ecosystems that enable customer understanding, support organisational coordination and facilitate relevant engagement throughout the customer journey. This observation aligns with recent research suggesting that customer experience increasingly depends on how effectively organisations connect technologies, touchpoints and customer information across the journey rather than on any single technology investment (Lundin & Kindström, 2024; De Keyser et al., 2025). These expressed priorities should not be read as evidence of realised performance improvements. Connected technology also brings practical trade-offs, including implementation complexity, data governance, coordination costs and the risks of excessive automation; these were not directly tested in this survey.

3.3 Who Owns the Customer Experience?

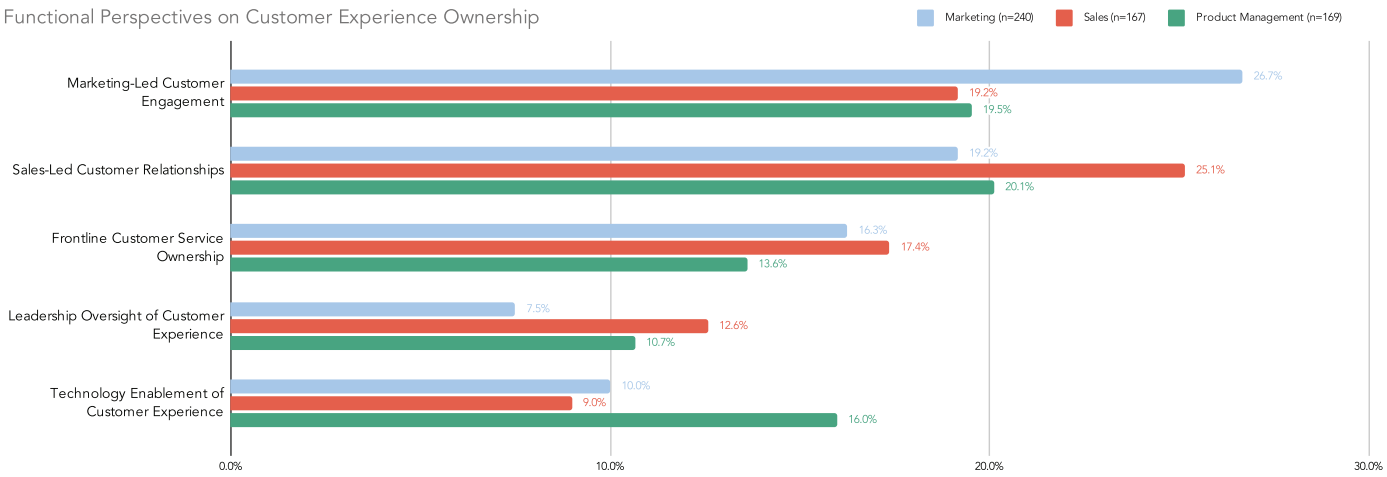


Figure 3.3. Functional Perspectives on Customer Experience Ownership (share of coded mentions within function %)

Customer experience is increasingly viewed as a shared organisational responsibility rather than the domain of a single function. Respondents consistently recognised that customer outcomes are shaped by activities occurring across marketing, sales, product management, customer service, operations and leadership teams.

Marketing respondents most frequently associated customer experience ownership with Marketing-Led Customer Engagement (26.7%) and Sales-Led Customer Relationships (19.2%), reflecting a strong focus on engagement, communication and customer understanding. Sales respondents similarly emphasised Sales-Led Customer Relationships (25.1%) and Marketing-Led Customer Engagement (19.2%), highlighting the complementary nature of these functions.

Product Management respondents adopted a broader organisational perspective. Sales-Led Customer Relationships (20.1%), Marketing-Led Customer Engagement (19.5%) and Frontline Customer Service Ownership (13.6%) were all identified as important contributors to customer outcomes, alongside Technology Enablement (16.0%) and Leadership Oversight (10.7%).

Although respondents differed in where they located primary responsibility, they consistently acknowledged that no individual function possesses all the capabilities required to deliver superior customer experiences. Marketing contributes customer understanding and engagement capability. Sales contributes relationship management and customer advocacy. Product Management contributes customer insight, innovation and value delivery.

> Marketing sets them up. Sales knocks them down. We work in the same office; it's a collaborative effort.
>
> Marketing Department, Agriculture & Agribusiness Industry, New Zealand

This distinction between ownership and contribution is significant. Customer experience increasingly depends on how effectively organisations coordinate activities across functions rather than on which department formally owns the customer. Shared customer information, aligned objectives, integrated processes and clear governance structures therefore become critical enablers of customer experience performance.

Recent research reinforces this conclusion, arguing that B2B customer experience emerges from the convergence of multiple organisational actors rather than from isolated departmental activities (De Keyser et al., 2025). Customer journeys span functional boundaries, making coordination, information sharing and aligned customer objectives increasingly important sources of competitive advantage.

The findings are consistent with a cross-functional approach to customer experience management. Organisations that align technology, people and processes around customer outcomes are better positioned to deliver consistent experiences across increasingly complex and interconnected customer journeys. This finding is also consistent with emerging research on customer journey management, which identifies cross-functional coordination, touchpoint integration, and shared customer understanding as foundational capabilities for delivering superior customer experiences (Homburg & Tischer, 2023).



Implications for B2B Leaders

Clarify how customer experience responsibilities are shared across functions. Examine whether customer information and feedback can move effectively between teams and identify opportunities to improve continuity across interactions.

4. Mapping the Contemporary B2B Customer Journey

The contemporary B2B customer journey is increasingly characterised by non-linear decision-making, self-directed research and movement between digital and human interactions. Respondents consistently described customers accessing information through multiple channels, revisiting stages of the buying process, and involving additional stakeholders throughout the decision-making process. The resulting journey is less predictable than traditional models and places greater emphasis on enabling customers to access information, support and expertise when required.

These findings align with recent B2B research suggesting that customer journeys are becoming increasingly complex, involving multiple decision-makers, parallel decision processes and repeated movement between touchpoints rather than following a simple sequential progression (De Keyser et al., 2025; Lundin & Kindström, 2024). Customers increasingly determine how, when and through which channels they engage with suppliers, shifting influence towards buyer-led rather than seller-led purchasing processes (Kalwey et al., 2025).

The findings indicate that customer experience is shaped by how effectively organisations support customers across three broad stages of the journey:

1. Pre-Purchase
2. Purchase
3. Post-Purchase

Although these stages provide a useful analytical framework, respondents rarely described customer journeys as sequential or linear. Customers frequently move between channels, revisit earlier stages and engage with organisations in different ways depending on the complexity of the purchase, the availability of information and the level of organisational risk involved. This reinforces a central theme emerging throughout the report: customer experience increasingly depends on an organisation's ability to coordinate touchpoints, information and engagement channels across the entire journey rather than optimising individual interactions in isolation (Homburg & Tischer, 2023; De Keyser et al., 2025). The three-stage journey illustration is therefore a conceptual organising device, not a measurement of the sequence, time spent or distribution of contacts in an individual buyer journey.

4.1 Touchpoints Across the Journey

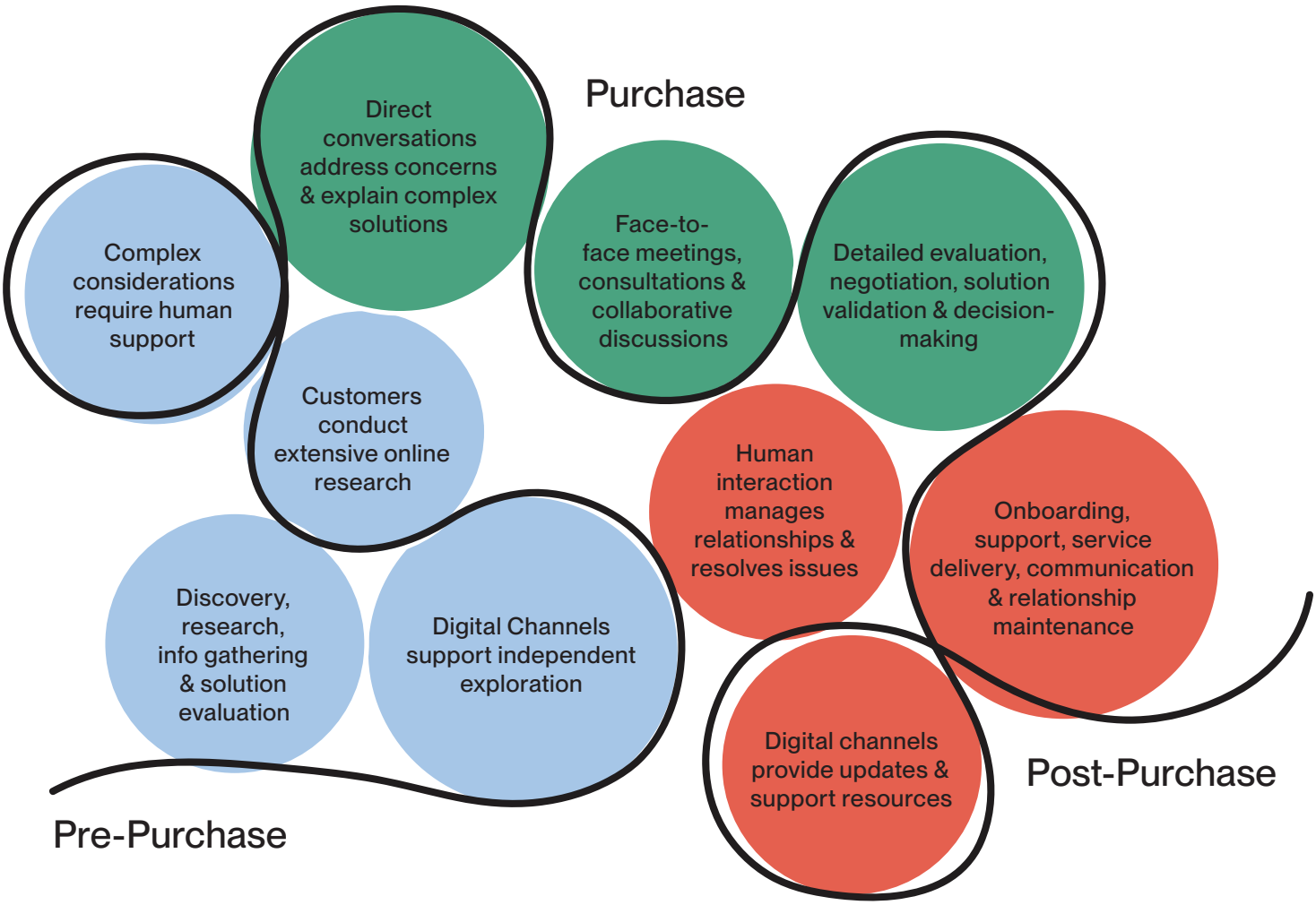


Figure 4.1. Touchpoints Across the Customer Journey (conceptual journey framework; stages are not necessarily sequential)

The findings suggest that customer touchpoints are not evenly distributed across the B2B journey. Different stages involve different customer needs, which in turn influence the types of interactions customers value most.

While digital channels increasingly support information gathering and routine activities, human interactions remain important in situations where decisions involve complexity, risk, and relationship development. The prominence of pre-purchase touchpoint mentions indicates that respondents place substantial emphasis on early-stage engagement; these counts do not directly measure actual interaction volume or influence before formal supplier engagement.

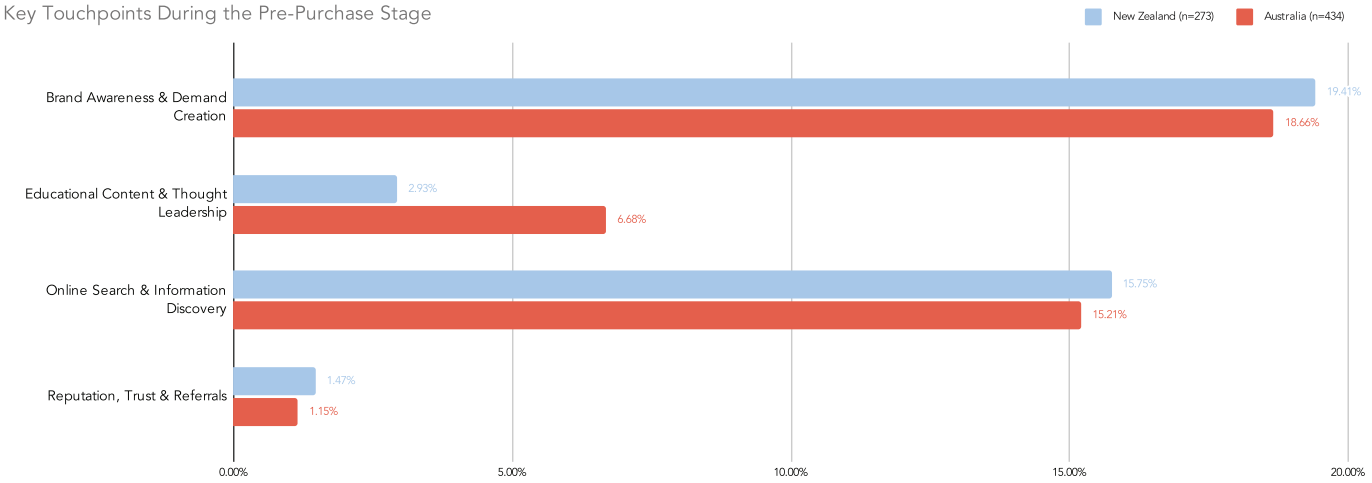


Figure 4.2. Key Touchpoints During the Pre-Purchase Stage (share of all named touchpoints within country, not only this stage %)

Pre-Purchase

Pre-purchase accounts for the largest share of touchpoints named in respondents' descriptions of B2B journeys. Pre-purchase touchpoints accounted for 41.7% of the touchpoints respondents named in Australia and 39.6% in New Zealand, making it the most frequently named stage in both markets. Respondents consistently described buyers undertaking substantial research, information gathering and supplier evaluation before engaging directly with sales representatives.

Respondents in both markets described buyers establishing preferences through digital discovery and independent research before speaking with suppliers, and the touchpoint data show very similar patterns in the two countries.

The largest categories of pre-purchase touchpoints, calculated as shares of all named touchpoints in each market, were Brand Awareness and Demand Creation (19.4% in New Zealand; 18.7% in Australia) and Online Search and Information Discovery (15.8% in New Zealand; 15.2% in Australia). Australian respondents also placed greater emphasis on Educational Content and Thought Leadership (6.7% compared with 2.9% in New Zealand), suggesting a stronger focus on content-led customer education during the early stages of the buying process.

Respondents identified a broad range of touchpoints that influence customer decisions during this stage, including:

- Company websites
- Search engines
- Industry publications
- Webinars and virtual events
- Thought leadership content
- Social media platforms
- Product demonstrations
- Online reviews and peer recommendations
- Case studies and success stories
- Email communications

Together, these touchpoints allow customers to gather information, compare alternatives and reduce uncertainty without direct engagement from suppliers.

The findings suggest that buyers increasingly use these resources to answer questions that were traditionally addressed through direct sales engagement. Product specifications, pricing information, implementation requirements, use cases and supplier comparisons can often be accessed independently, allowing customers to advance significantly through the buying process before contacting a supplier.

This transformation changes the role organisations play during the early stages of the customer journey. Influence increasingly depends on visibility, accessibility and credibility. Organisations that provide relevant information, educational content and clear evidence of value are more likely to shape customer preferences before formal supplier evaluation begins.

Respondents also highlighted the growing complexity of decision-making during this phase. Customers rarely progress through a fixed sequence of activities. Instead, they move repeatedly between touchpoints as new information emerges, competing alternatives are considered, or additional stakeholders become involved. This finding is consistent with recent research suggesting that B2B buying journeys increasingly involve multiple stakeholders, repeated movement between stages and parallel decision-making processes rather than linear progression through a predefined pathway (De Keyser et al., 2025; Lundin & Kindström, 2024).

> Marketing controls the first 70% of the journey. Owns website, content, brand, campaigns. If CX starts broken here, sales can't fix it.
>
> Marketing Department, IT & Technology Industry, Australia

Multiple decision-makers further increase this complexity. Technical stakeholders often require detailed product information, while commercial stakeholders focus on financial outcomes, implementation risk and business value. Organisations therefore face increasing pressure to deliver content and engagement experiences that address diverse information requirements across buying groups.

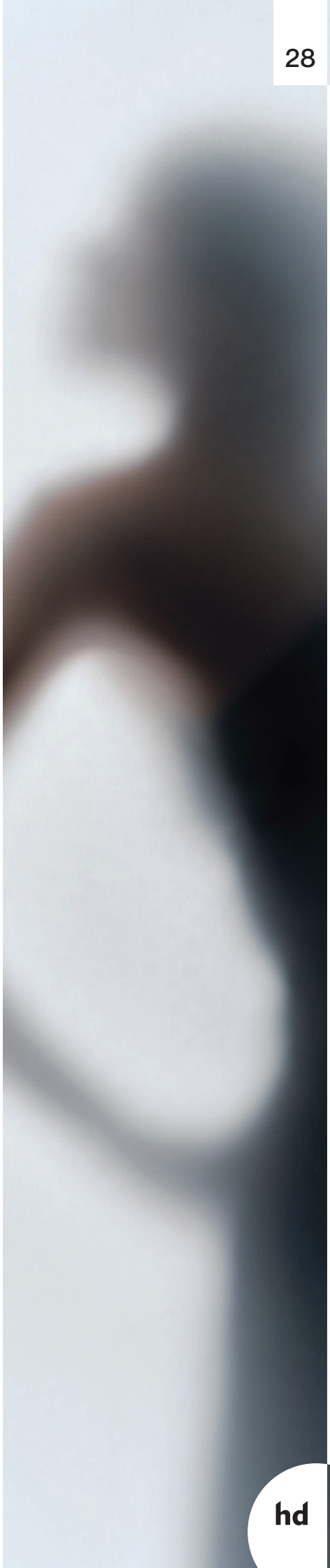
Despite the growing importance of self-service engagement, human interaction remains relevant during the pre-purchase stage. Respondents frequently described situations in which customers seek clarification, expert advice, or reassurance before proceeding. Human engagement therefore supplements independent research rather than replacing it.

The pre-purchase journey increasingly combines three interconnected activities:

Information Discovery → Solution Evaluation → Confidence Building

Customers may complete the first two activities largely through digital channels, but confidence-building often requires some form of human engagement, particularly in higher-value or more complex purchasing situations.

The findings suggest that organisations no longer compete only during formal procurement or sales processes. They increasingly compete during the research phase, when customers are forming preferences, shortlisting options, and shaping perceptions of supplier credibility long before direct interaction occurs. This observation aligns with recent research indicating that contemporary B2B purchasing is increasingly buyer-led, with customers completing a significant portion of the evaluation process independently before engaging directly with suppliers (Kalwey et al., 2025).



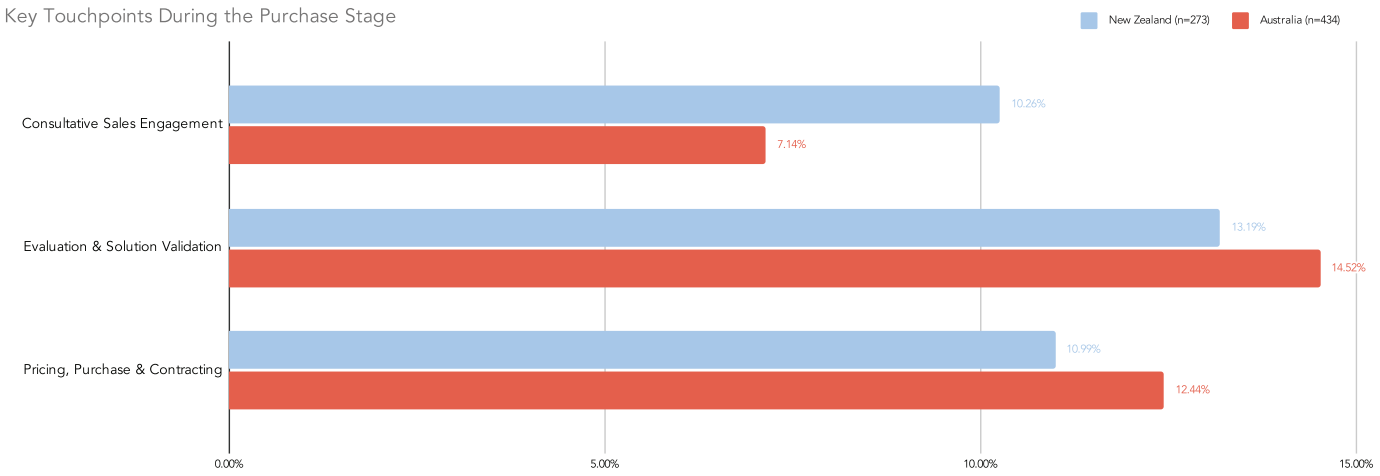


Figure 4.3. Key Touchpoints During the Purchase Stage (share of all named touchpoints within country, not only this stage %)

Purchase

Respondents associated the evaluation-to-selection stage with a greater need for direct engagement. Purchase-stage touchpoints accounted for 34.1% of identified touchpoints in Australia and 34.4% in New Zealand, making this the second most frequently named stage.

Respondents consistently associated this stage with activities that benefit from human expertise and interaction. Customers often require tailored information, clarification of requirements, implementation guidance and reassurance before making commitments that may have operational or financial consequences.

Evaluation and Solution Validation was the largest purchase-stage category as a share of all named touchpoints in each country, representing 14.5% of touchpoints in Australia and 13.2% in New Zealand. Pricing, Purchase and Contracting accounted for 12.4% and 11.0% respectively, while Consultative Sales Engagement represented 10.3% of touchpoints in New Zealand and 7.1% in Australia.

Frequently identified touchpoints include:

- Sales consultations
- Product demonstrations
- Proposal discussions
- Commercial negotiations
- Technical workshops
- Stakeholder presentations
- Procurement processes

Digital channels continue to support these activities through documentation, access to information, and transaction management, but respondents generally viewed technology as supporting rather than replacing direct engagement at this stage.

Trust, expertise and responsiveness become increasingly important as the purchasing decision approaches. Human interaction, therefore, remains a critical mechanism for reducing uncertainty, aligning proposed solutions with customer requirements, and building confidence in supplier capabilities.

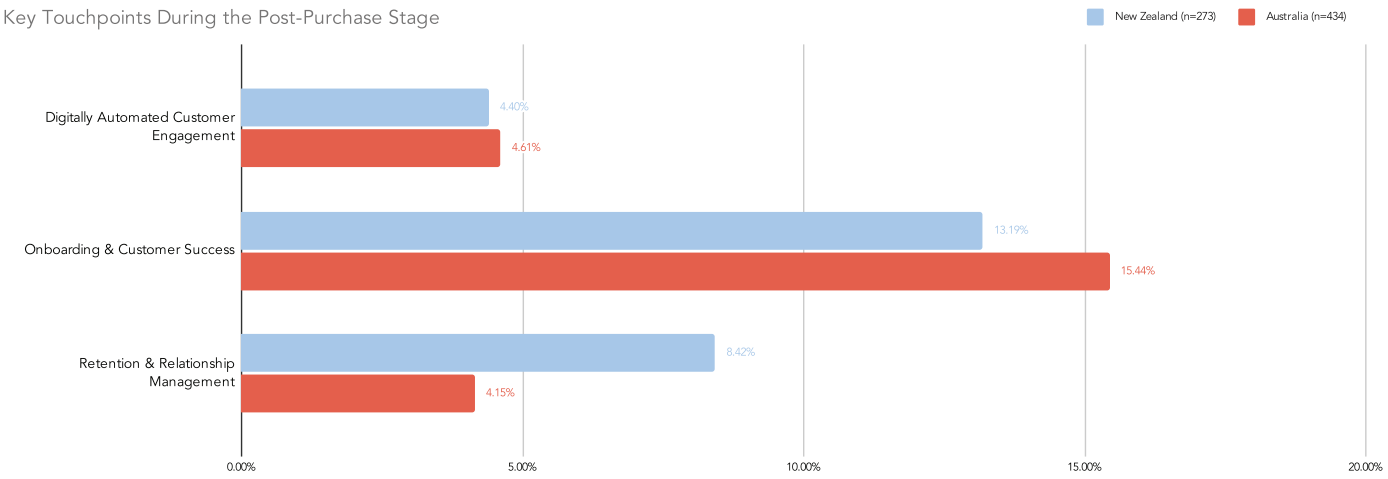


Figure 4.4. Key Touchpoints During the Post-Purchase Stage (share of all named touchpoints within country, not only this stage %)

Post-Purchase

Customer experience extends beyond conversion and continues throughout onboarding, implementation, support and relationship management activities. Post-purchase touchpoints accounted for 24.2% of all named touchpoint mentions in Australia and 26.0% in New Zealand, highlighting the continued importance of customer engagement after the initial transaction.

Onboarding and Customer Success was the largest post-purchase category, representing 15.4% of all named touchpoints in Australia and 13.2% in New Zealand. Retention and Relationship Management accounted for 8.4% of all named touchpoints in New Zealand and 4.2% in Australia, while Digitally Automated Customer Engagement represented approximately 4.5% in both markets.

Digital channels play an important role during this stage through customer portals, self-service support, routine communications and account management tools. These technologies improve accessibility and reduce customer effort while supporting ongoing engagement.

At the same time, respondents emphasised the continuing importance of personal interaction for relationship development, issue resolution and strategic account management. Human engagement remains particularly valuable when customers encounter challenges, seek advice or explore opportunities for future growth and collaboration.

The findings reinforce the view that customer experience is an ongoing process rather than a discrete transaction. Organisations that maintain engagement beyond the point of sale are better positioned to strengthen customer relationships, identify evolving needs and create long-term customer value. This aligns with customer journey management research suggesting that post-purchase interactions play a critical role in loyalty development, retention and future value creation (Homburg & Tischer, 2023).

4.2 Understanding the Role of Digital and Human Interaction

Responses across different stages of the journey suggest that digital and human interactions serve distinct customer needs, rather than competing for the same role. Respondents consistently described customers selecting interaction channels based on the task they are attempting to complete, the complexity of the decision, and the level of confidence required to progress through the journey.

> “Agreed strategy in person and stage reviews digitally. Reviews of achievement in person.”
>
> Training Delivery Department,
> Education & Training Industry, Australia

The findings indicate that digital engagement is primarily valued for convenience, accessibility and efficiency. Digital Convenience for Routine Tasks accounted for 20.7% of coded interaction-preference mentions, making it the single largest category identified by respondents. Digital Research and Information Gathering represented a further 16.1%, while Digital-First Service Strategy accounted for 10.2%. Together, digital preferences account for 47.0% of coded responses, reinforcing the growing importance of self-service engagement, independent information access and technology-enabled customer support throughout the buying process.

Digital interactions are therefore most strongly associated with:

- Information access
- Research and discovery
- Convenience
- Self-service
- Speed and efficiency
- Routine transactions

At the same time, respondents consistently highlighted the continuing importance of human engagement. Face-to-Face Complex Decision Support accounted for 14.2% of interaction preferences, while Face-to-Face Trust and Relationship Building represented 13.3%. Physical Product Evaluation contributed a further 4.0%. Together, face-to-face preferences account for 31.4% of coded responses, suggesting that customers continue to value direct interaction when decisions involve uncertainty, risk, strategic importance or relationship development. New Zealand respondents were more likely than Australian respondents to favour face-to-face trust and relationship-building (17.0% versus 11.1%) and hybrid journeys (21.1% versus 17.4%). In comparison, Australian respondents were more likely to favour digital convenience for routine tasks (22.7% versus 17.7%).

Human interactions are most strongly associated with:

- Trust-building
- Strategic discussions
- Solution evaluation
- Problem-solving
- Negotiation
- Relationship development

Perhaps the most significant finding is the prominence of hybrid engagement. Hybrid Customer Journeys accounted for 19.0% of coded interaction-preference mentions, suggesting that respondents view customer experience as the outcome of coordinated digital and human interactions rather than a choice between the two. Respondents frequently described customers conducting independent research through digital channels before seeking guidance, reassurance or expertise through direct engagement with supplier representatives.

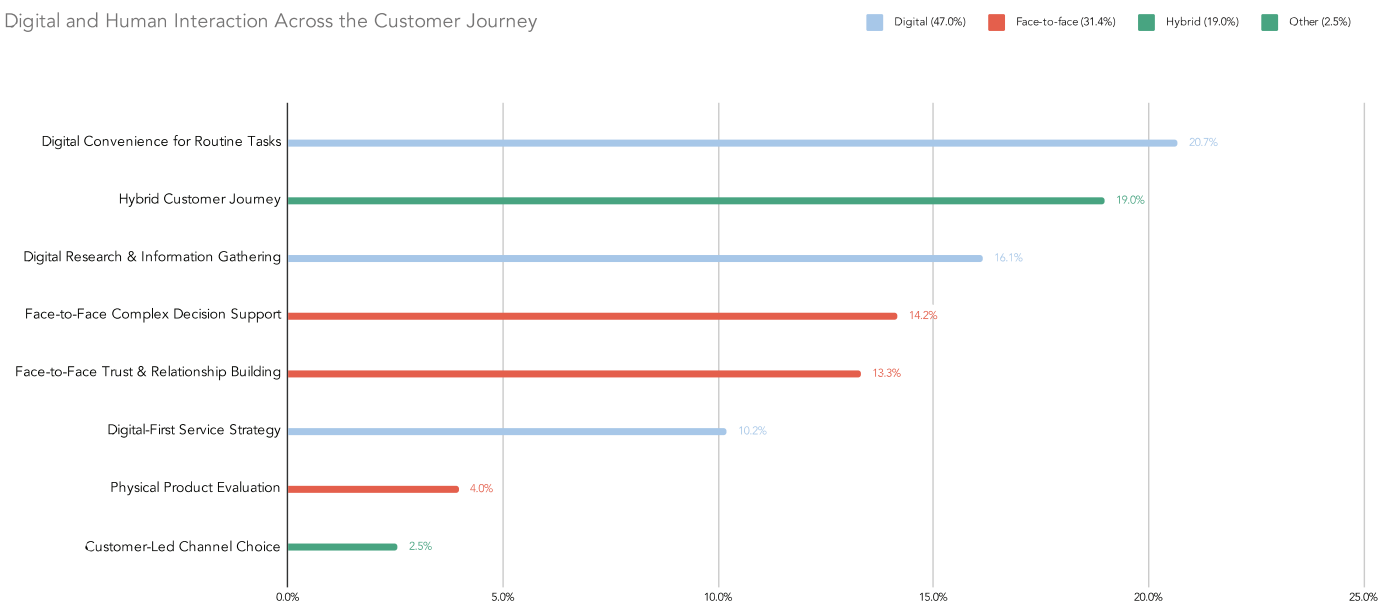


Figure 4.5. Digital and Human Interaction Across the Customer Journey (share of coded interaction-preference mentions %)

This finding aligns closely with emerging B2B customer journey research, which suggests that buyers increasingly move between digital and human touchpoints based on their information needs, confidence levels, and decision-making stage, rather than following a fixed sequence of interactions (De Keyser et al., 2025; Lundin & Kindström, 2024). Recent research on holistic selling similarly argues that successful organisations orchestrate digital and interpersonal engagement throughout the customer journey rather than relying exclusively on either channel (Kalwey et al., 2025).

The most effective customer journeys therefore combine the strengths of both forms of engagement. Digital channels allow customers to progress independently when seeking information, comparing alternatives or completing routine tasks, while human interactions provide expertise, judgement and reassurance when decisions become more complex.

The findings suggest that customer experience is strengthened when organisations align interaction methods with customer objectives rather than adopting either a digital-first or a human-first model. Customers increasingly expect access to both. The challenge for organisations is to ensure these channels operate as an integrated system that supports decision-making, reduces friction, and delivers consistent experiences across the entire customer journey. Organisations that successfully coordinate digital convenience with human expertise are better positioned to build trust, improve customer outcomes and create long-term customer value.

Implications for B2B Leaders

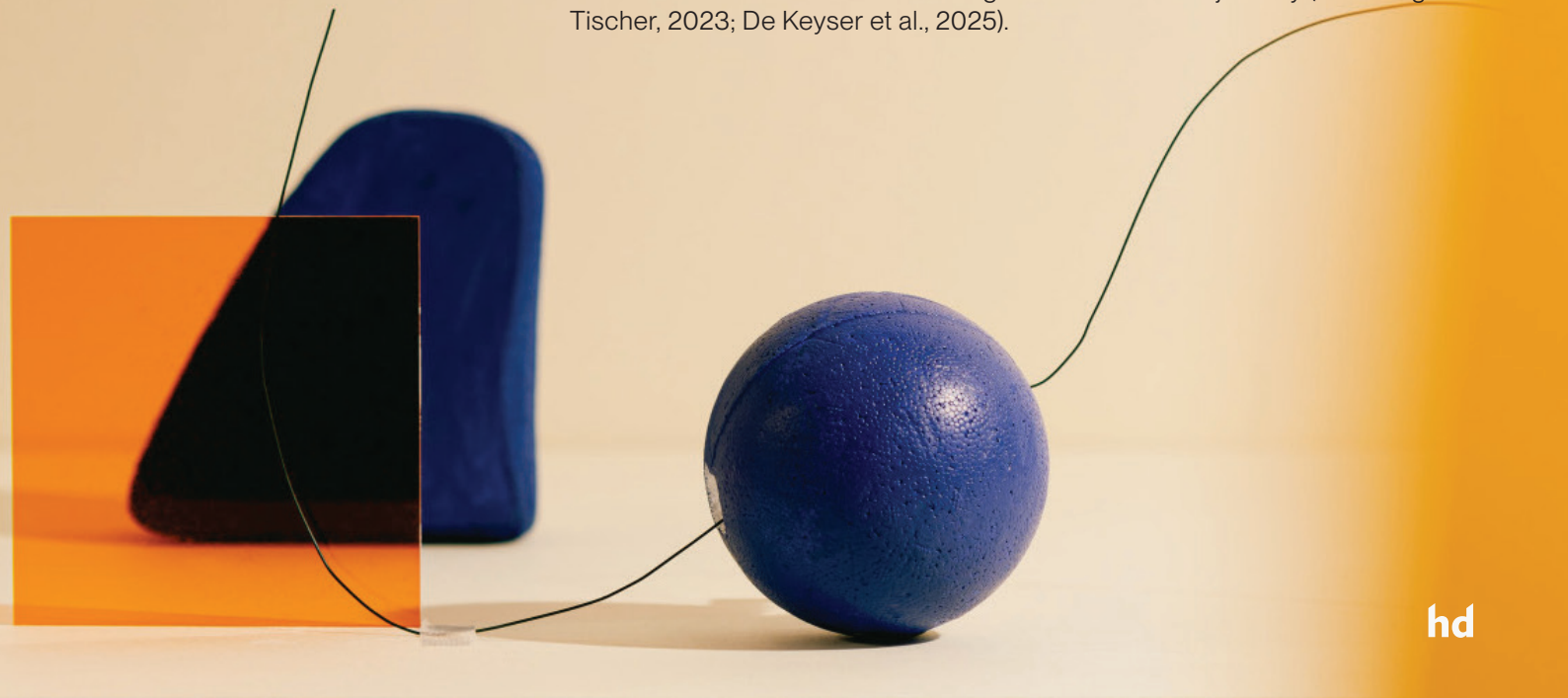
Map the digital and human touchpoints customers encounter across pre-purchase, purchase and post-purchase stages. Test whether the mix of self-service and personal engagement reflects customer needs at each stage rather than internal channel preferences.

5. From Customer Touchpoints to Customer-Experience Capabilities

The preceding chapters demonstrate that an effective customer experience is created through the interaction among customer understanding, technology, organisational coordination, and customer engagement practices. Respondents consistently described customer experience as the outcome of multiple interconnected activities rather than isolated touchpoints or individual technologies.

As customer journeys become increasingly digital, non-linear and cross-functional, organisations require capabilities to anticipate customer needs, coordinate interactions across channels and functions, leverage customer data effectively, and adapt to changing market expectations. Analysis of the findings reveals six interconnected capability areas that underpin the successful delivery of customer experience across contemporary B2B organisations.

These capabilities provide a practical framework for translating customer insights, technology investments and journey design into customer and commercial outcomes. They also align closely with emerging research suggesting that customer experience performance increasingly depends on an organisation's ability to coordinate touchpoints, customer information and cross-functional activities throughout the customer journey (Homburg & Tischer, 2023; De Keyser et al., 2025).



5.1 Capability Themes

An interpretive synthesis of responses identifies six interconnected themes linked to the delivery of effective B2B customer experience. These six themes may complement one another in supporting how organisations attract, engage, support and retain customers.

Understanding Customers and Responding to Changing Needs

Customer understanding emerged as a foundational capability across the research, with Customer Insight and Analytics Capability (12.0%) and Customer Feedback Integration (4.5%) together accounting for 16.5% of the capabilities respondents named. Respondents consistently linked effective customer experience to the ability to identify changing customer expectations, recognise evolving buying behaviours and respond to emerging needs throughout the customer lifecycle.

The growth of self-directed research, digital engagement, and non-linear decision-making increases the need for organisations to gather and apply customer insights continuously. Customers now interact with organisations through multiple channels and touchpoints before, during and after purchase, generating a broader range of behavioural signals and information than traditional engagement models.

Australian respondents more frequently emphasised analytics, customer intelligence and data-driven insight generation, while New Zealand respondents placed relatively greater emphasis on understanding customer relationships and engagement requirements. These findings reflect broader differences observed throughout the report, with Australian organisations more frequently prioritising data-driven decision-making. In contrast, New Zealand organisations placed greater emphasis on customer engagement and relationship development.

Organisations that effectively capture customer insights are better positioned to anticipate changing requirements, identify points of friction and adapt engagement strategies before customer issues emerge. Recent customer journey research similarly identifies customer understanding as a foundational capability that enables organisations to create more relevant and responsive customer experiences (Homburg & Tischer, 2023).

Coordinating Interactions Across the Customer Journey

Respondents consistently described customer experience as extending beyond individual interactions. Customers move between digital platforms, sales conversations, service interactions and ongoing relationship activities throughout the customer journey, creating the need for coordination across touchpoints and functions.

The findings suggest that the quality of the customer experience is heavily influenced by how effectively organisations connect these interactions. Fragmented experiences create inconsistency, duplication and customer effort, while coordinated experiences improve continuity and reduce friction. Clear Customer and Internal Communication (13.5%) and Governance and Accountability (8.9%) were among the capabilities respondents most often named.

The challenge becomes increasingly complex as customers engage through both self-service and human-assisted channels. Organisations therefore require mechanisms that ensure customer information, interaction history and customer context remain visible across the journey.

Customer experience increasingly depends on managing the connections between interactions rather than optimising individual touchpoints in isolation. This aligns closely with recent research arguing that customer journeys should be managed as interconnected systems of touchpoints rather than collections of individual customer interactions (Lundin & Kindström, 2024; De Keyser et al., 2025).

Integrating Customer Data and Technology

Technology emerged throughout the research as a critical enabler of customer experience capability. Respondents consistently associated CRM platforms, customer intelligence systems, analytics capabilities, automation technologies and artificial intelligence applications with improved customer understanding and engagement effectiveness.

This finding is consistent with earlier results showing that technologies associated with AI, Automation and Data Intelligence accounted for around two-thirds of future technology priorities among Marketing, Sales and Product Management respondents (66.7% to 69.4%), and Digital Capability for Customer Experience was the second most frequently named customer experience capability (14.4%). Respondents consistently linked technology investment to improvements in customer understanding, personalisation, and decision quality, rather than simply increasing operational efficiency.

The strongest responses focused less on individual technologies and more on their integration. Customer data often exists across multiple systems, departments and interaction channels. Organisations therefore require the capability to consolidate customer information, generate actionable insights and apply those insights consistently across customer-facing activities.

Australian respondents more frequently emphasised advanced analytics, automation and predictive capabilities. New Zealand respondents more commonly discussed technologies that improve operational efficiency, engagement and relationship management. Both perspectives point towards the same underlying requirement: connected information that supports better customer decision-making.

The value of customer technology increasingly depends on how effectively information can be shared, interpreted and acted upon throughout the organisation. Recent B2B research similarly suggests that technology creates value when it enables customer understanding, organisational coordination and more effective customer engagement rather than functioning as an isolated operational tool (Kalwey et al., 2025).

Balancing Digital and Human Interaction

One of the clearest findings throughout the report is that digital and human interactions serve different customer needs. Respondents consistently associated digital interactions with efficiency, accessibility and information access, while human engagement was linked to trust, expertise, collaboration and relationship development.

The digital and human interaction analysis revealed that Hybrid Customer Journeys accounted for 19.0% of interaction preferences, Digital Convenience for Routine Tasks for 20.7%, and Digital Research and Information Gathering for 16.1%. At the same time, respondents consistently highlighted the importance of Face-to-Face Complex Decision Support (14.2%) and Face-to-Face Trust and Relationship Building (13.3%).

These findings suggest that effective customer experience may require more than simply increasing digital capability. Organisations must determine where automation enhances customer value and where direct human involvement remains essential.

Respondents commonly associated digital engagement with research, information gathering and routine transactions. They also associated greater complexity, uncertainty and risk with a need for direct engagement with organisational representatives.

The capability challenge is therefore one of orchestration. Organisations must design engagement models that allow customers to move seamlessly between digital and human interactions while

maintaining consistency throughout the experience. This conclusion aligns closely with contemporary B2B research emphasising the importance of coordinating digital convenience with human expertise across customer journeys (Kalwey et al., 2025; Lundin & Kindström, 2024).

Cross-Functional Collaboration

Customer experience is inherently cross-functional. Marketing, Sales, Product Management, Customer Service, Technology and Leadership teams all contribute to customer outcomes through different activities and responsibilities.

Respondents placed importance on Frontline Customer Service Ownership (14.6%), Clear Customer and Internal Communication (13.5%), Customer-Centric Culture (9.5%) and Cross-Functional Collaboration (9.3%), all of which emerged as central capability requirements for delivering superior customer experiences.

Respondents consistently recognised that no single department possesses all the capabilities required to deliver superior customer experiences. Marketing contributes customer insights and engagement capabilities. Sales contributes relationship development and customer advocacy. Product Management contributes customer understanding, innovation and value delivery.

Differences observed throughout the analysis reinforce this conclusion. Marketing respondents emphasised customer insights and engagement. Sales respondents focused on trust and relationship management. Product Management respondents highlighted innovation, technology and customer needs. These perspectives are complementary rather than competing.

Organisations that align objectives, information flows and decision-making across functions are better positioned to deliver consistent customer experiences than those operating through functional silos. Recent research similarly argues that customer experience emerges from coordinated contributions across organisational functions rather than individual departments acting independently (De Keyser et al., 2025).

Organisational Agility and Adaptation

Customer expectations, technology capabilities and market conditions continue to evolve rapidly. Respondents consistently described customer behaviour as becoming more dynamic, informed and digitally enabled, creating continuous pressure for organisations to adapt.

The ability to respond quickly to changing customer needs emerged as a critical organisational capability. Findings show Adaptability and Responsiveness (7.8% of capabilities named) as a core component of the effective customer experience capability, reflecting the growing need for organisations to continuously evolve in step with customer expectations.

This includes learning from customer feedback, monitoring behavioural changes, refining engagement approaches and reassessing technology investments as requirements evolve.

Agility also extends to capability development. The findings indicate a growing demand for data literacy, customer insight generation, digital capabilities, and AI-related expertise across the Marketing, Sales, and Product Management functions. Organisations must therefore continuously adapt workforce capabilities alongside customer-facing processes and technologies.

Customer experience capability is not a fixed asset. It develops through ongoing learning, experimentation and adaptation as organisations respond to changing customer expectations and competitive conditions. Organisations that successfully combine customer understanding, technology integration, coordinated interactions and organisational agility are better positioned to create sustained customer value in increasingly complex B2B markets.

5.2 Closing the Loop Across the Report

Respondents' accounts describe a perceived shift in how B2B customers discover, evaluate and engage with suppliers. Technology has expanded buyers' access to information, increased customer autonomy, and reshaped expectations regarding speed, convenience, and personalisation. Customers are increasingly able to navigate significant portions of the buying journey independently, reducing reliance on supplier-led interactions during the early stages of decision-making.

Across both Australia and New Zealand, respondents consistently highlighted the growing importance of digital discovery, self-directed research and technology-enabled engagement. Pre-purchase activities accounted for 41.7% of the touchpoints respondents named in Australia and 39.6% in New Zealand, highlighting the prominence of pre-purchase activity in the reported touchpoints, without directly measuring actual customer influence. These findings reinforce a broader shift towards buyer-led journeys in which customers determine how, when and through which channels they engage with organisations.

These changes are altering the role organisations play throughout the customer journey. Influence increasingly depends on an organisation's ability to establish credibility before direct engagement occurs, provide relevant information through preferred channels and support customers as they move between digital and human interactions. Customer experience has consequently evolved from a series of isolated touchpoints into a coordinated system of interactions spanning the entire customer lifecycle.

The findings also demonstrate that successful adaptation requires more than investment in technology. Technologies associated with AI, Automation and Data Intelligence accounted for around two-thirds of future technology priorities among Marketing, Sales and Product Management respondents (66.7% to 69.4%), indicating respondents' strong emphasis on customer intelligence, analytics and automation. However, respondents consistently emphasised that technology alone does not create superior customer experiences. The value of these investments ultimately depends on the capabilities of the people using them. Data literacy, analytical capability, communication, relationship management and customer understanding emerged as complementary capabilities rather than competing priorities.

A second theme running throughout the analysis is the growing importance of organisational alignment. Marketing, Sales and Product Management respondents approached customer experience from different perspectives, reflecting their distinct responsibilities across the customer journey. Data and Analytical Skills were the top skill priority for both Marketing (22.3%) and Sales (19.8%) respondents; Product Management respondents placed the strongest emphasis on AI and Automation Skills (26.6%), and Sales respondents gave Communication and Relationship Skills around twice the weight Marketing respondents did (15.4% versus 7.4%). Despite these differences, respondents consistently recognised that customer outcomes depend on coordination between functions rather than the performance of any single department.

The customer journey provides a practical illustration of this challenge. Customers increasingly move between self-directed research, digital engagement, direct interaction and ongoing relationship management as their needs evolve. Digital channels are valued for convenience, efficiency, and access to information, while direct engagement remains important where trust, expertise, and judgement are required. Delivering a consistent experience, therefore, requires organisations to coordinate interactions across channels, maintain visibility of customer context

and ensure that customers can move seamlessly between digital convenience and human expertise.

The findings point to a connected progression throughout the B2B landscape:

Changing buyer expectations and behaviours

- Reshape how customers research, evaluate and engage with suppliers
- Increase the importance of digital discovery, customer insight and connected experiences
- Inform priorities for data, automation, analytics and customer-focused technologies
- Create demand for new organisational capabilities and ways of working
- Influence how customer journeys are designed, managed and optimised
- Determine the quality of customer experiences and long-term customer relationships

Taken together, the findings support a growing body of research suggesting that effective customer experience management depends on the coordination of technology, touchpoints, information and organisational capabilities across increasingly complex customer journeys (Homburg & Tischer, 2023; Lundin & Kindström, 2024; De Keyser et al., 2025; Kalwey et al., 2025).

The central implication of this descriptive research is that B2B customer experience is unlikely to be explained by a single technology, touchpoint or organisational function. It emerges from an organisation's ability to align customer understanding, technology, data, human expertise and cross-functional collaboration around evolving customer needs. As buyer behaviour becomes more informed, connected and self-directed, this alignment is likely to become an increasingly important source of competitive advantage for B2B organisations.



Implications for B2B Leaders

Review capabilities in data, analytics, technology and interpersonal engagement together. Prioritise the skills and coordination practices needed to turn technology investment into more consistent customer experiences.

6. Marketing and Sales: Different Perspectives on Customer Experience

The preceding analysis examined the customer experience from an organisational perspective, highlighting the technologies, interactions, and capabilities that shape contemporary B2B customer engagement. This final section introduces a functional perspective by exploring how Marketing and Sales respondents interpret these changes.

Both functions play critical roles throughout the customer journey, but they engage customers in different ways and at different stages. Marketing is typically responsible for creating awareness, generating demand and supporting customer understanding before direct engagement occurs. Sales is more directly involved in guiding evaluation, managing relationships and supporting decision-making during and after purchase.

The findings reveal more alignment than conflict between the two functions. However, important differences emerge in technology priorities, views on customer interactions, and perceptions of how the customer experience is created. These differences provide insight into how organisations can better coordinate customer-facing activities across the customer journey.

6.1 Differences in the Technology Landscape

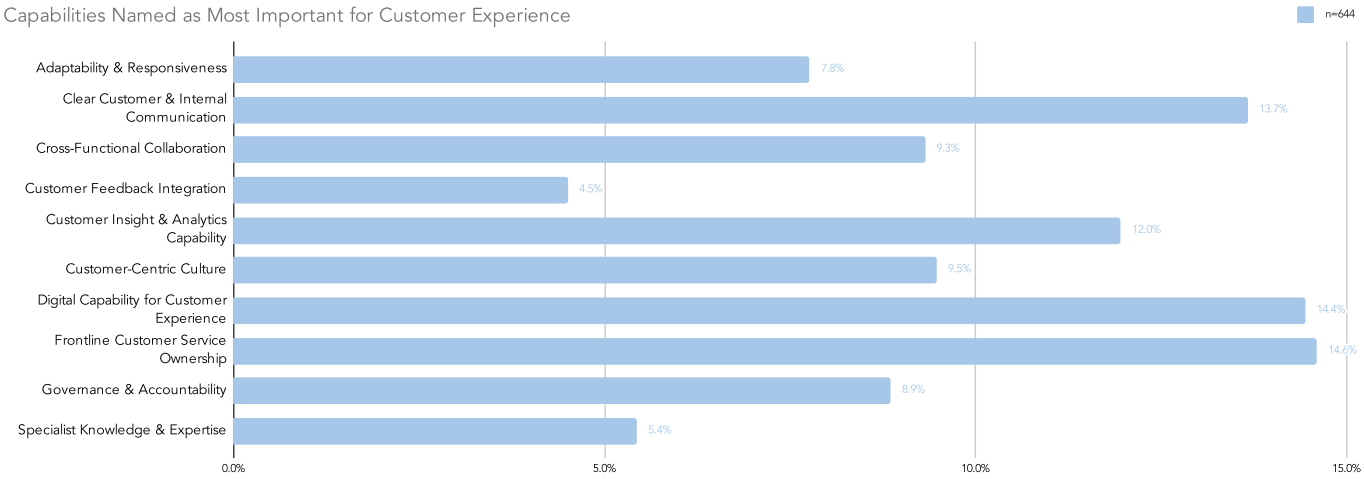


Figure 6.1. Future Technology Priorities: Marketing versus Sales (selected leading themes; share of coded mentions within function %)

Marketing and Sales respondents both view technology as essential to future competitiveness, but they prioritise different technologies based on where they create value within the customer journey.

AI remained the dominant technology priority across both functions. However, important differences emerged in how Marketing and Sales respondents expected technology to create value. Marketing respondents placed greater emphasis on Predictive Analytics and Forecasting (13.6%), Workflow and Campaign Automation (8.9%), and Personalised Targeting and Experiences (9.9%), reflecting a stronger focus on customer understanding, engagement effectiveness and demand generation.

Sales respondents placed considerably greater emphasis on General AI Adoption and Use (29.2%) than Marketing respondents (20.2%). They showed stronger interest in Core IT Infrastructure and Systems (11.8%) and Predictive Targeting and Lead Scoring (8.3%). These priorities highlight the importance of productivity, customer visibility and opportunity management within sales environments.

Despite these differences, both functions consistently identified AI, analytics and connected data environments as critical priorities. AI-related technologies accounted for the largest share of future technology priorities in both functions, indicating broad agreement regarding the strategic importance of technology-enabled customer engagement.

The findings suggest that technology creates the greatest value when Marketing and Sales operate from a shared customer view rather than separate information environments. Recent B2B research similarly argues that technology increasingly supports coordinated buyer engagement across functions rather than isolated departmental activities (Kalwey et al., 2025).

6.2 Differences in Customer Interaction and Touchpoint Usage

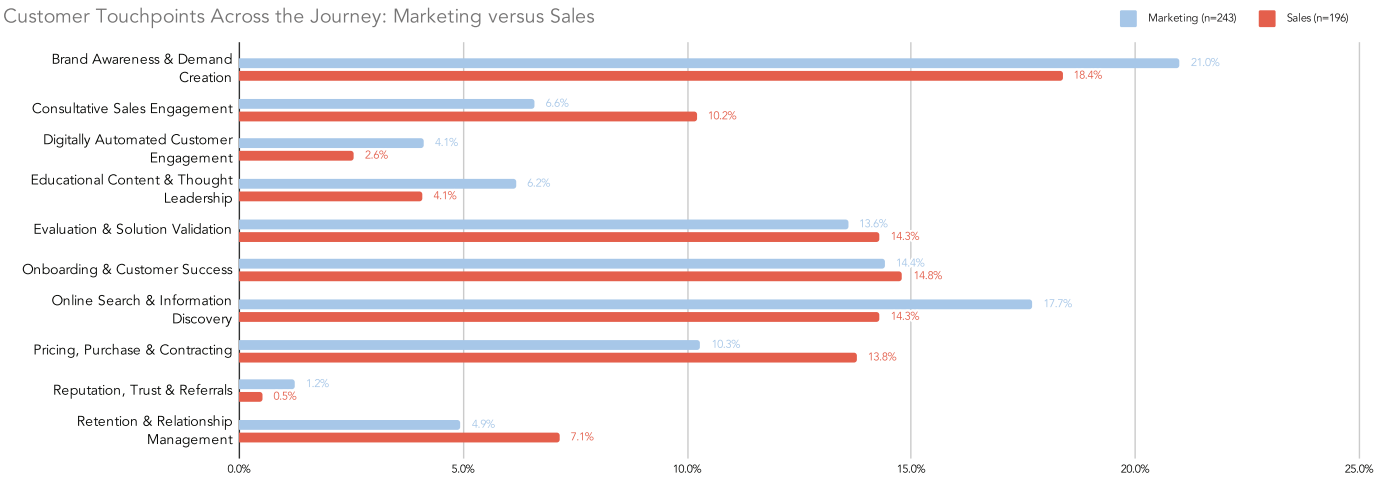


Figure 6.2. Customer Touchpoints Across the Journey: Marketing versus Sales (share of all named touchpoints within function %)

Marketing and Sales roles focus on different activities, which may help explain differences in their descriptions of customer journeys.

AI remained the dominant Marketing respondents placed the strongest emphasis on Brand Awareness and Demand Creation (21.0%) and Online Search and Information Discovery (17.7%), reflecting their involvement in the early stages of the customer journey, when customers are defining needs, exploring solutions, and gathering information independently. Marketing respondents also placed greater emphasis on Educational Content and Thought Leadership (6.2%) and Digitally Automated Customer Engagement (4.1%).

Sales respondents, by contrast, were more likely to emphasise Evaluation and Solution Validation (14.3%), Pricing, Purchase and Contracting (13.8%), Consultative Sales Engagement (10.2%), and Retention and Relationship Management (7.1%). Their perspective reflects direct involvement in helping customers evaluate options, reduce uncertainty and progress towards purchasing decisions.

These differences demonstrate that Marketing and Sales are often supporting different phases of the same customer journey. Marketing primarily influences customer behaviour before direct engagement occurs, while Sales becomes increasingly important as decision complexity, risk and relationship requirements increase.

These patterns are consistent with the functions focusing on different moments of buying processes; the survey did not track the same customers across functions or measure individual journeys. This finding aligns with recent research suggesting that buyer-led journeys increasingly require coordinated engagement across multiple customer-facing functions (Kalwey et al., 2025; De Keyser et al., 2025).

6.3 Differences in Technologies Supporting Customer Experience

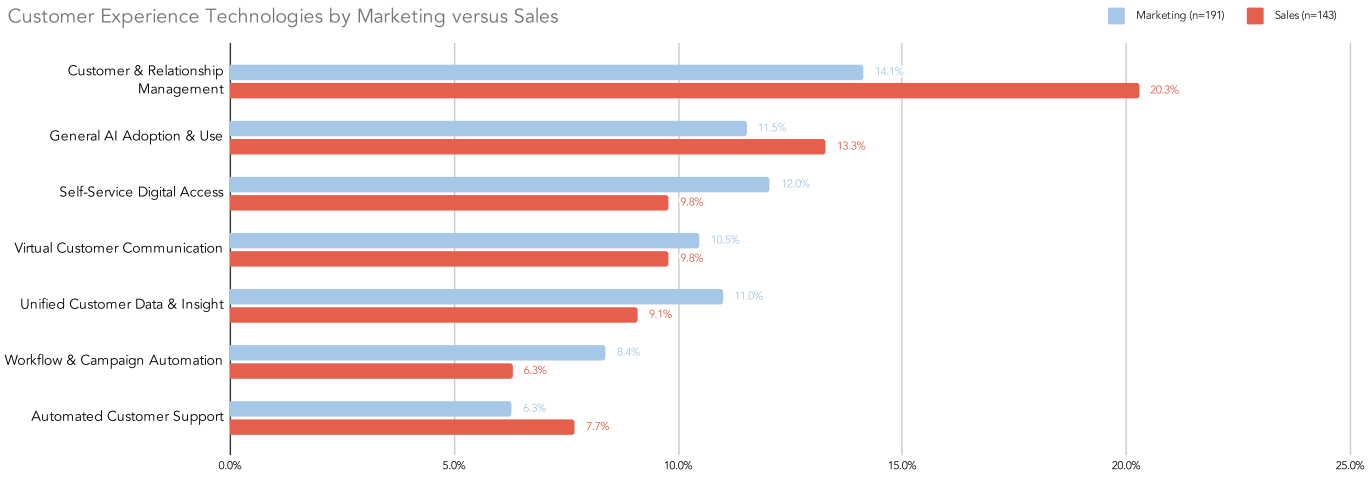


Figure 6.3. Customer Experience Technologies by Marketing versus Sales (share of coded mentions within function %)

Functional differences become more apparent when examining technologies specifically associated with the delivery of customer experience.

Sales respondents most frequently associated customer experience with Customer and Relationship Management technologies (20.3%), well above the emphasis placed on these technologies by Marketing respondents (14.1%). Sales respondents also placed greater emphasis on General AI Adoption and Use (13.3% versus 11.5%) and Automated Customer Support (7.7% versus 6.3%), highlighting the importance of maintaining customer visibility and supporting relationship continuity throughout the customer lifecycle.

Marketing respondents placed comparatively greater emphasis on Self-Service Digital Access (12.0% versus 9.8%), Unified Customer Data and Insight (11.0% versus 9.1%), Virtual Customer Communication (10.5% versus 9.8%) and Workflow and Campaign Automation (8.4% versus 6.3%). These priorities reflect a focus on creating relevant, personalised and scalable customer engagement before and during customer interactions.

These differing perspectives reveal two complementary dimensions of customer experience. Marketing focuses on creating relevance through customer insight, personalisation and engagement optimisation. Sales focuses on creating value through relationship continuity, communication and customer support.

Respondents' accounts suggest that these capabilities can complement one another. Customer intelligence, automation and personalisation can support more relevant and efficient engagement, while relationship management, communication and direct interaction may help build customer confidence and sustain relationships. This observation is consistent with customer journey research suggesting that effective customer experience depends on integrating digital capabilities with customer-facing relationship management across the buying journey (Lundin & Kindström, 2024).

6.4 Different Functional Contributions to Customer Experience

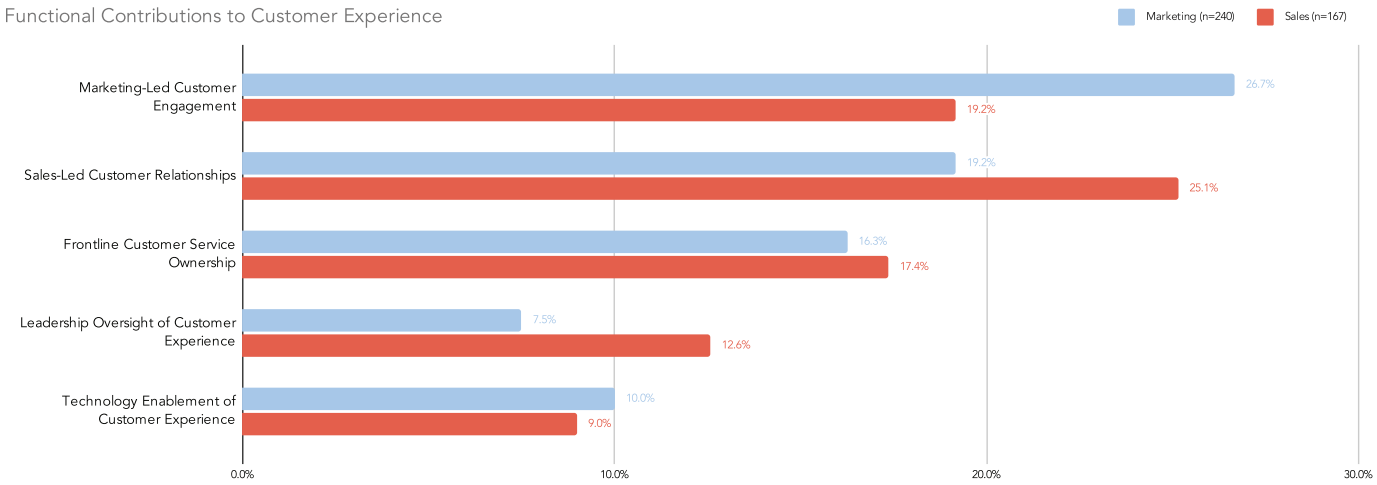


Figure 6.4. Functional Contributions to Customer Experience (share of coded mentions within function %)

The findings indicate that Marketing and Sales make distinct but complementary contributions to customer experience. While both functions influence customer outcomes, they contribute at different stages of the customer journey and through different organisational capabilities.

Marketing respondents most frequently associated customer experience with Marketing-Led Customer Engagement (26.7%), well above the emphasis Sales respondents placed on this category (19.2%). This finding reflects Marketing's role in customer understanding, audience development, content creation, demand generation and engagement management. Through customer insights, analytics, digital channels and personalised communication, Marketing shapes customer perceptions and influences decision-making before direct engagement occurs.

Sales respondents, by contrast, most frequently associated customer experience with Sales-Led Customer Relationships (25.1%), compared with 19.2% among Marketing respondents. Sales respondents also placed greater emphasis on Leadership Oversight of Customer Experience (12.6% versus 7.5%), while both functions gave similar weight to Frontline Customer Service Ownership (17.4% and 16.3%). These findings highlight the importance Sales places on relationship management, consultative engagement and direct interaction throughout the customer lifecycle.

Despite these differences, both functions demonstrated substantial overlap in their views of customer experience delivery. Marketing respondents recognised the importance of customer relationships and frontline customer service, while Sales respondents acknowledged the critical role of customer engagement and communication. Technology Enablement of Customer Experience was also viewed as an important contributor by both groups (10.0% Marketing; 9.0% Sales), reinforcing the growing importance of connected technology ecosystems in customer experience delivery.

These findings reinforce a consistent theme throughout the report: customers do not experience separate Marketing and Sales journeys. Customers experience a single journey that crosses departmental boundaries. Marketing contributes to customer understanding, engagement capability, and demand creation, while Sales contributes to relationship development, consultation, and customer advocacy. The quality of the customer experience depends less on the performance of individual functions and more on how effectively these contributions are coordinated.

Recent B2B research similarly suggests that customer experience emerges from the interaction of multiple organisational actors rather than any single customer-facing function (De Keyser et al., 2025). As customer journeys become increasingly complex, organisations require greater coordination between engagement, relationship management, service delivery and technology functions to deliver consistent customer outcomes.

6.5 Implications for Organisational Capabilities

The comparison between Marketing and Sales highlights the importance of alignment across customer-facing functions.

Many of the capabilities identified throughout this report, including customer understanding, journey orchestration, data integration, technology adoption, and customer engagement, require collaboration between the two groups. Neither function possesses all the information, capabilities or customer visibility required to manage the customer experience independently.

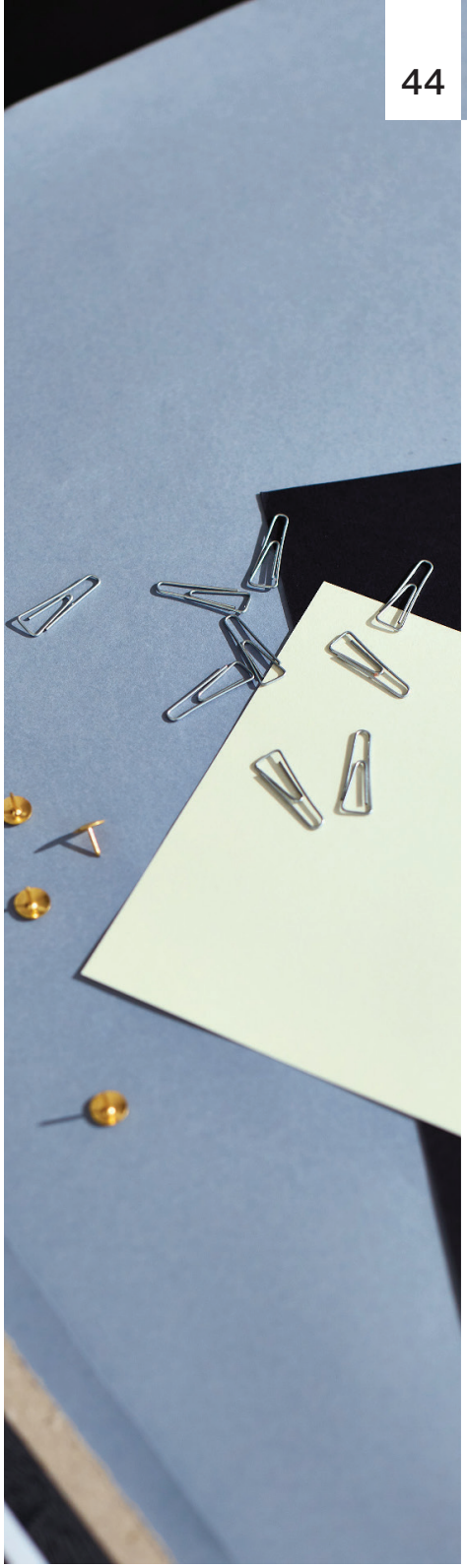
Throughout the report, Marketing respondents consistently prioritised customer insight generation, analytics, digital engagement and personalisation. Sales respondents placed greater emphasis on relationship management, communication, trust-building and customer advocacy. These differences do not represent competing approaches to customer experience. Instead, they reflect the complementary roles each function performs throughout the customer journey.

The findings suggest that superior customer experiences are most likely to emerge when Marketing and Sales operate as interconnected contributors to a shared customer strategy. Shared customer data, aligned objectives, integrated technology platforms and coordinated engagement processes help reduce friction throughout the customer journey while improving customer understanding and organisational responsiveness.

This conclusion is reinforced by earlier findings showing that customer experience increasingly depends on connected data environments, integrated technology ecosystems and coordinated digital and human interactions. Marketing and Sales therefore require not only functional expertise, but also the ability to collaborate around a common understanding of customer needs and customer outcomes.

Recent B2B research supports this perspective, arguing that effective customer experience management and customer journey orchestration depend on integrating touchpoints, information flows and organisational capabilities across the enterprise rather than optimising individual functions in isolation (Kalwey et al., 2025; De Keyser et al., 2025; Homburg & Tischer, 2023).

The challenge for organisations is therefore not determining which function owns customer experience. The challenge is to create the organisational conditions that enable both functions to contribute effectively to a common customer outcome. Organisations that successfully align technology, customer insight, engagement processes and relationship management activities are likely to be better positioned to create consistent customer experiences and sustainable competitive advantage in increasingly complex B2B markets.



Implications for B2B Leaders

Create a shared view of customer journeys across Marketing, Sales and Product Management. Agree how customer information, lead qualification, handovers and follow-up responsibilities are coordinated, while retaining each function's distinct contribution.

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Appendix A: Respondent Profile

The findings presented in this report are based on 515 valid responses from B2B professionals across Australia and New Zealand. Respondents represent a balanced geographic distribution, a mix of marketing, sales and product management functions, and organisations spanning diverse industries, employee sizes and revenue categories. The sample was not restricted to senior executives and captures perspectives from both smaller firms and large enterprises, providing insight into how organisations are responding to changing customer expectations, technology adoption and evolving commercial practices.

Geographic Distribution

- Australia: 49.1%
- New Zealand: 47.2%
- Cross-Country Role: 2.5%
- Not Specified: 1.2%

Functional Representation

- Marketing: 34.4%
- Product Management: 27.4%
- Sales: 26.8%
- Others: 10.9%
- Not Specified: 0.6%

Industry Representation

Respondents were drawn from a broad cross-section of B2B industries. The largest industry groups were:

- Consumer Goods & Retail (15.0%)
- IT & Technology (14.8%)
- Banking & Financial Services (10.9%)
- Building & Construction (9.5%)
- Manufacturing (5.2%)
- Agriculture & Agribusiness (4.5%)
- Legal & Professional Services (4.3%)

The remaining respondents represented sectors including automotive, engineering, healthcare, logistics, food and beverage, government, telecommunications, media, recruitment and non-profit organisations.

Organisation Characteristics

The sample includes organisations ranging from small businesses to large multinational enterprises.

Number of Employees

- 1-9 employees: 14.2%
- 10-49 employees: 16.3%
- 50-250 employees: 20.0%
- 251-499 employees: 15.0%
- 500-999 employees: 18.6%
- 1,000-2,499 employees: 8.4%
- 2,500-4,999 employees: 3.3%
- 5,000-9,999 employees: 1.4%
- 10,000 or more: 2.5%
- Not Specified: 0.4%

Annual Revenue

Revenue was reported in local currency (AUD or NZD). Grouped into three bands, 65.2% of respondents reported annual revenue under $10 million, 23.5% between $10 million and $100 million, and 10.7% above $100 million, with 0.6% not reporting revenue. The detailed bands are shown below.

- Less than $50,000: 5.1%
- $50,000-250,000: 14.4%
- $250,000-1 million: 10.9%
- $1-2 million: 12.6%
- $2-5 million: 8.7%
- $5-10 million: 13.6%
- $10-25 million: 9.7%
- $25-50 million: 7.6%
- $50-100 million: 6.2%
- $100-500 million: 4.7%
- $500 million - $1 billion: 1.6%
- More than $1 billion: 4.5%
- Not Specified: 0.6%

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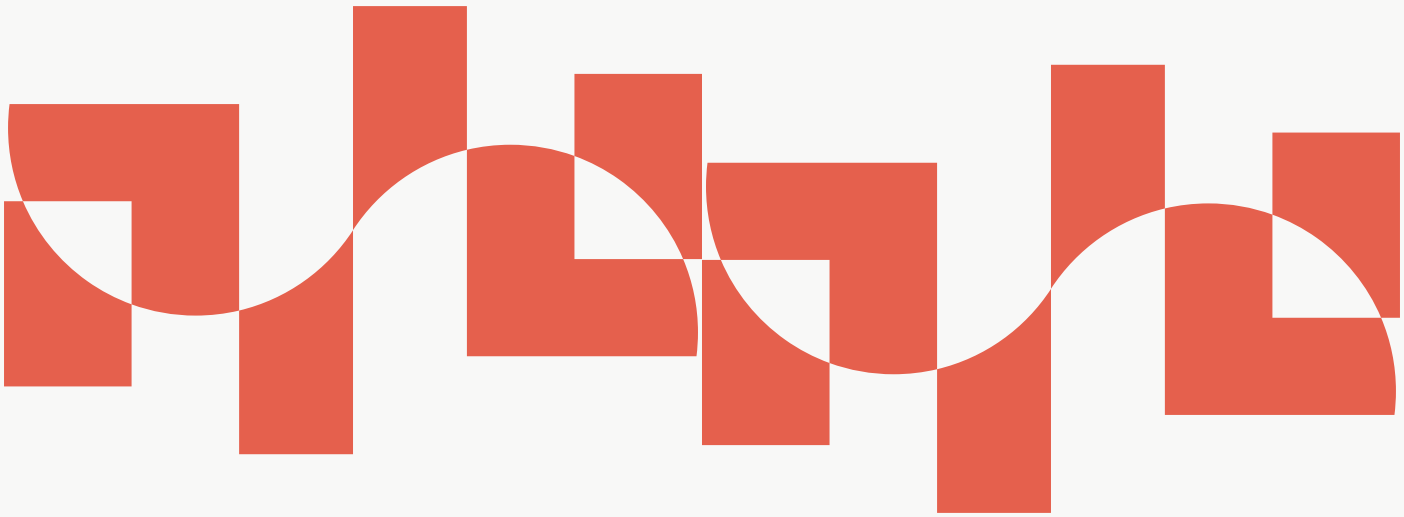
Australian Marketing INSTITUTE



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