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# Global B2B Digital Marketing Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global B2B Digital Marketing market size is expected to reach $ 87864 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

B2B Digital Marketing refers to externally commercialized software, data products, digital media capabilities, and professional services used by enterprises to identify organizational buyers, build market awareness, generate and nurture leads, activate priority accounts, support opportunity conversion, and measure marketing contribution to revenue. The market primarily covers marketing automation and buyer-journey orchestration, account-based marketing, company and contact intelligence, buyer-intent data, website visitor identification, B2B media and content syndication, webinars and digital events, marketing analytics and attribution, content personalization, and managed B2B marketing services. These solutions connect corporate websites, CRM systems, customer data platforms, email, professional social networks, advertising channels, event systems, and sales workflows through technologies such as identity resolution, company graphs, lead and account scoring, predictive analytics, automated campaign rules, generative AI, and multichannel engagement. This study focuses on supplier net revenue generated from products and services whose principal commercial purpose is enterprise customer acquisition, target-account development, pipeline generation, buying-group engagement, and customer expansion.

## Key Findings

North America remains the largest regional market and the primary supply center for enterprise B2B Digital Marketing platforms

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Managed services and specialist agencies represented approximately 28% of 2025 supplier net revenue

Marketing automation and journey orchestration accounted for nearly 24% of the 2025 market structure

ABM intent data and revenue marketing contributed approximately 19% and remain among the fastest-developing solution categories

The verified core supplier pool contains 60 companies while the wider market remains fragmented across regional specialists

## Market Trends

B2B Digital Marketing is moving from campaign-based lead generation toward continuous management of accounts, buying groups, and revenue pipelines. Product development is increasingly centered on unified first-party data, company-level identity, buyer-intent signals, automated account prioritization, content personalization, and closer synchronization between marketing and sales workflows. AI is being embedded into campaign planning, content creation, audience development, conversational engagement, journey orchestration, and performance optimization rather than remaining a standalone feature. Adobe and Salesforce have both expanded AI-assisted and agentic capabilities within their enterprise marketing platforms, while LinkedIn increasingly frames B2B purchasing as a group decision involving product users, finance, procurement, legal, operations, and other stakeholders. As these capabilities become more widely available, differentiation is shifting away from basic email execution toward proprietary data, workflow depth, integration quality, industry expertise, and the ability to demonstrate contribution to qualified pipeline and revenue.

## Market Dynamics

### Drivers

Market expansion is being supported by the digitalization of complex enterprise purchasing journeys, increasing pressure to connect marketing expenditure with pipeline outcomes, and wider adoption of CRM-integrated automation, ABM, intent data, webinars, professional content, and digital media. B2B buyers increasingly conduct

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independent research and involve multiple stakeholders before contacting a supplier, encouraging vendors to invest in persistent brand visibility, educational content, account-level engagement, and coordinated marketing and sales activity. Demand is also being reinforced by international expansion among software, industrial, professional-service, and technology companies that require scalable multilingual lead generation and localized digital engagement.

## Restraints

Adoption is constrained by fragmented customer data, legacy-system integration requirements, inconsistent lead definitions, weak attribution models, and the organizational difficulty of aligning marketing and sales teams. Enterprise implementations may require extensive data cleaning, CRM restructuring, content development, user training, and continuing marketing operations support, raising the effective cost beyond the software subscription. Privacy and direct-marketing requirements also restrict the use of third-party contact databases and cross-site identifiers. European rules require appropriate legal grounds, transparent data processing, current data records, and mechanisms for individuals to object to direct marketing, increasing compliance costs for data and audience providers.

## Opportunities

The strongest opportunities are emerging in buying-group intelligence, first-party data activation, privacy-compliant intent signals, AI-assisted campaign creation, account orchestration, and automated connections between marketing engagement and sales action. Industrial manufacturers, professional-service firms, healthcare suppliers, financial institutions, and regional B2B companies remain less digitally mature than enterprise software vendors, creating room for verticalized platforms and specialist agencies. China, Japan, India, Southeast Asia, and other localized markets also offer opportunities for suppliers that can support domestic communication channels, regional languages, local business databases, regulatory requirements, and cross-border customer acquisition.

## Challenges

The industry faces increasing commoditization of routine content production, email creation, media execution, and basic campaign configuration as generative AI lowers

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production barriers. Independent point solutions must compete against larger CRM, cloud, data, and media platforms that can bundle overlapping functions into broader enterprise agreements. Poor-quality intent signals, unverifiable contact data, excessive automated outreach, and inconsistent attribution can weaken customer trust and reduce renewal rates. Suppliers must therefore balance rapid AI deployment with data governance, human review, deliverability controls, brand safety, and evidence that automated activity produces commercially meaningful engagement rather than additional marketing volume.

## Value Chain Analysis

The upstream layer of the B2B Digital Marketing value chain consists of cloud infrastructure, AI models, corporate and contact data, identity-resolution technology, advertising inventory, professional social networks, content production resources, data connectors, privacy-management systems, and CRM or customer-data platforms. These inputs determine the accuracy, scalability, compliance, and operating cost of downstream marketing solutions. Proprietary enterprise data, exclusive media audiences, reliable first-party signals, and deeply embedded CRM integrations generally provide stronger competitive protection than basic campaign-management functionality.

The midstream layer includes marketing automation vendors, ABM and intent-data platforms, B2B media and content-syndication providers, webinar and digital-event platforms, attribution and personalization tools, and specialist agencies or managed-service firms. Value is created by transforming fragmented data and buyer activity into prioritized accounts, relevant content, coordinated engagement, and measurable commercial outcomes. Recurring software and data subscriptions generally provide stronger scalability, while media and professional services contribute industry expertise, local execution, and campaign customization but carry higher delivery requirements. Downstream customers include technology vendors, industrial manufacturers, professional-service firms, financial institutions, healthcare and life-science companies, telecommunications providers, and other organizations with complex, multi-stakeholder sales processes.

## Segment Insights

Managed services and specialist agencies formed the largest solution block in 2025, representing approximately 28% of supplier net revenue. Their position reflects continued enterprise demand for strategy, creative development, media operations,

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ABM execution, technology implementation, and outsourced marketing operations. Marketing automation and journey orchestration represented nearly 24%, supported by recurring subscription models, established CRM integration, and broad use across lead nurturing, campaign management, event follow-up, and sales alignment.

B2B media and content syndication accounted for roughly 19%, while ABM, intent data, and revenue marketing contributed a similar share. The ABM and data segment is expected to develop more rapidly as customers shift from individual lead volumes toward account quality, buying-group coverage, and pipeline conversion. Regional and localized marketing technology represented approximately 11%, with particular relevance in China, Japan, India, and markets where local communication channels, language requirements, business databases, and regulatory practices reduce the effectiveness of globally standardized platforms.

### Downstream Market Opportunities

Technology, software, and telecommunications remain the most digitally mature customer groups, but incremental opportunities are increasingly found in industrial manufacturing, professional services, financial services, healthcare, life sciences, logistics, energy, and other sectors with high contract values and long purchasing cycles. These customers require stronger account identification, technical content, distributor and channel engagement, event-to-pipeline conversion, and coordination among marketing, field sales, product specialists, and regional teams. Suppliers that combine sector expertise with data, automation, content, and measurable demand generation are better positioned than providers offering standardized campaign execution alone.

## Regional Insights

North America remains the largest regional market and the leading source of global marketing automation, ABM, intent-data, software-review, professional-network, and B2B technology-media platforms. The region benefits from high enterprise SaaS adoption, substantial marketing technology expenditure, developed data ecosystems, and a concentration of software and cloud companies with measurable digital acquisition models. Europe represents another major market, with particular strength in specialist B2B agencies, website visitor identification, corporate data, and privacy-oriented marketing solutions.

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China and Japan have developed distinct localized ecosystems. Chinese suppliers commonly position their products around marketing cloud, WeChat and WeCom engagement, SCRM, lead operations, and sales-marketing integration, while Japanese providers have established domestic marketing automation and digital-event workflows adapted to local enterprise practices. India is important both as an expanding end market and as a delivery center for content syndication, data research, qualified lead generation, and managed demand services. Southeast Asia, the Middle East, Latin America, and Australia remain comparatively fragmented but offer opportunities to regional agencies and platforms capable of combining local channels with international B2B campaign execution.

## Competitive Landscape Analysis

The competitive landscape combines large enterprise technology platforms, specialist data and ABM vendors, B2B media owners, global marketing groups, and numerous regional agencies. Microsoft, Adobe, Salesforce, HubSpot, and Oracle compete through installed software ecosystems, customer data, workflow integration, and enterprise relationships, while ZoomInfo, 6sense, Demandbase, Bombora, and similar specialists compete through company intelligence, intent signals, account identification, and activation precision. Professional marketing groups compete through integrated strategy, media, creative, technology, and managed operations, whereas smaller suppliers rely on specialized industry knowledge, regional channels, proprietary datasets, or faster implementation. Consolidation is increasing as companies seek to connect data, media, content, buyer engagement, and revenue workflow: the Informa Tech digital businesses and TechTarget were combined into Informa TechTarget, and Omnicom completed its acquisition of Interpublic in 2025. The core formal supplier list therefore represents providers with established product or delivery capability, while the extended market remains substantially more fragmented across localized marketing technology firms, specialist agencies, and emerging AI-enabled platforms.

## Report Scope

This report studies the global B2B Digital Marketing demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for B2B Digital

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Marketing, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of B2B Digital Marketing that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global B2B Digital Marketing total market, 2021-2032, (USD Million)

Global B2B Digital Marketing total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: B2B Digital Marketing total market, key domestic companies, and share, (USD Million)

Global B2B Digital Marketing revenue by player, revenue and market share 2021-2026, (USD Million)

Global B2B Digital Marketing total market by Type, CAGR, 2021-2032, (USD Million)

Global B2B Digital Marketing total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global B2B Digital Marketing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Microsoft Corporation, Salesforce, Inc., HubSpot, Inc., Adobe Inc., WPP plc, Publicis Groupe S.A., Omnicom Group Inc., Accenture plc, Dentsu Group Inc., Oracle Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world B2B Digital Marketing market

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## Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global B2B Digital Marketing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global B2B Digital Marketing Market, Segmentation by Type:

Managed Services and Specialist Agencies

Marketing Automation and Journey Orchestration

Account-Based Marketing and Account Orchestration

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Others

## Global B2B Digital Marketing Market, Segmentation by Primary Marketing Objective:

Brand Awareness and Category Creation

Demand Generation and Lead Acquisition

Lead Nurturing and Opportunity Conversion

Others

## Global B2B Digital Marketing Market, Segmentation by Delivery and Commercial Model:

SaaS Subscription

Data-as-a-Service and Usage-Based

Media and Performance-Based

Project-Based Professional Services

Others

## Global B2B Digital Marketing Market, Segmentation by Application:

Software and Telecommunications

Industrial and Manufacturing

Professional and Business Services

Others

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## Companies Profiled:

Microsoft Corporation

Salesforce, Inc.

HubSpot, Inc.

Adobe Inc.

WPP plc

Publicis Groupe S.A.

Omnicom Group Inc.

Accenture plc

Dentsu Group Inc.

Oracle Corporation

ZoomInfo Technologies Inc.

Dun & Bradstreet Holdings, Inc.

Informa TechTarget, Inc.

6sense Insights, Inc.

Demandbase, Inc.

Anteriad

DemandScience

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NextRoll, Inc.

G2.com, Inc.

Madison Logic, Inc.

Qualified.com, Inc.

Albacross Nordic AB

Leadspace, Inc.

Common Room, Inc.

Mutiny, Inc.

Warmly, Inc.

Sopro

MOI Global

JINGdigital

Beschannels

Convertlab

Focussend

Tungee

SATORI, Inc.

## Key Questions Answered

1. How big is the global B2B Digital Marketing market?
2. What is the demand of the global B2B Digital Marketing market?

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3. What is the year over year growth of the global B2B Digital Marketing market?
4. What is the total value of the global B2B Digital Marketing market?
5. Who are the Major Players in the global B2B Digital Marketing market?
6. What are the growth factors driving the market demand?

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# Contents


## 1 SUPPLY SUMMARY

1.1 B2B Digital Marketing Introduction
1.2 World B2B Digital Marketing Market Size & Forecast (2021 & 2025 & 2032)
1.3 World B2B Digital Marketing Total Market by Region (by Headquarter Location)
  1.3.1 World B2B Digital Marketing Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.3 China Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.4 Europe Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.5 Japan Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.6 South Korea Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.7 ASEAN Based Company B2B Digital Marketing Revenue (2021-2032)
  1.3.8 India Based Company B2B Digital Marketing Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 B2B Digital Marketing Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

## 2 DEMAND SUMMARY

2.1 World B2B Digital Marketing Consumption Value (2021-2032)
2.2 World B2B Digital Marketing Consumption Value by Region
  2.2.1 World B2B Digital Marketing Consumption Value by Region (2021-2026)
  2.2.2 World B2B Digital Marketing Consumption Value Forecast by Region (2027-2032)
2.3 United States B2B Digital Marketing Consumption Value (2021-2032)
2.4 China B2B Digital Marketing Consumption Value (2021-2032)
2.5 Europe B2B Digital Marketing Consumption Value (2021-2032)
2.6 Japan B2B Digital Marketing Consumption Value (2021-2032)
2.7 South Korea B2B Digital Marketing Consumption Value (2021-2032)
2.8 ASEAN B2B Digital Marketing Consumption Value (2021-2032)
2.9 India B2B Digital Marketing Consumption Value (2021-2032)

## 3 WORLD B2B DIGITAL MARKETING COMPANIES COMPETITIVE ANALYSIS

3.1 World B2B Digital Marketing Revenue by Player (2021-2026)

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info@marketpublishers.com

3.2 Industry Rank and Concentration Rate (CR)
3.2.1 Global B2B Digital Marketing Industry Rank of Major Players
3.2.2 Global Concentration Ratios (CR4) for B2B Digital Marketing in 2025
3.2.3 Global Concentration Ratios (CR8) for B2B Digital Marketing in 2025
3.3 B2B Digital Marketing Company Evaluation Quadrant
3.4 B2B Digital Marketing Market: Overall Company Footprint Analysis
3.4.1 B2B Digital Marketing Market: Region Footprint
3.4.2 B2B Digital Marketing Market: Company Product Type Footprint
3.4.3 B2B Digital Marketing Market: Company Product Application Footprint
3.5 Competitive Environment
3.5.1 Historical Structure of the Industry
3.5.2 Barriers of Market Entry
3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

## 4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: B2B Digital Marketing Revenue Comparison (by Headquarter Location)
4.1.1 United States VS China: B2B Digital Marketing Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
4.1.2 United States VS China: B2B Digital Marketing Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: B2B Digital Marketing Consumption Value Comparison
4.2.1 United States VS China: B2B Digital Marketing Consumption Value Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: B2B Digital Marketing Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based B2B Digital Marketing Companies and Market Share, 2021-2026
4.3.1 United States Based B2B Digital Marketing Companies, Headquarters (States, Country)
4.3.2 United States Based Companies B2B Digital Marketing Revenue, (2021-2026)
4.4 China Based Companies B2B Digital Marketing Revenue and Market Share, 2021-2026
4.4.1 China Based B2B Digital Marketing Companies, Company Headquarters (Province, Country)

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info@marketpublishers.com

4.4.2 China Based Companies B2B Digital Marketing Revenue, (2021-2026)
4.5 Rest of World Based B2B Digital Marketing Companies and Market Share, 2021-2026
4.5.1 Rest of World Based B2B Digital Marketing Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies B2B Digital Marketing Revenue (2021-2026)

**5 MARKET ANALYSIS BY TYPE**

5.1 World B2B Digital Marketing Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Managed Services and Specialist Agencies
5.2.2 Marketing Automation and Journey Orchestration
5.2.3 Account-Based Marketing and Account Orchestration
5.2.4 Others
5.3 Market Segment by Type
5.3.1 World B2B Digital Marketing Market Size by Type (2021-2026)
5.3.2 World B2B Digital Marketing Market Size by Type (2027-2032)
5.3.3 World B2B Digital Marketing Market Size Market Share by Type (2027-2032)

**6 MARKET ANALYSIS BY PRIMARY MARKETING OBJECTIVE**

6.1 World B2B Digital Marketing Market Size Overview by Primary Marketing Objective: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Primary Marketing Objective
6.2.1 Brand Awareness and Category Creation
6.2.2 Demand Generation and Lead Acquisition
6.2.3 Lead Nurturing and Opportunity Conversion
6.2.4 Others
6.3 Market Segment by Primary Marketing Objective
6.3.1 World B2B Digital Marketing Market Size by Primary Marketing Objective (2021-2026)
6.3.2 World B2B Digital Marketing Market Size by Primary Marketing Objective (2027-2032)
6.3.3 World B2B Digital Marketing Market Size Market Share by Primary Marketing Objective (2027-2032)

**7 MARKET ANALYSIS BY DELIVERY AND COMMERCIAL MODEL**

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7.1 World B2B Digital Marketing Market Size Overview by Delivery and Commercial Model: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Delivery and Commercial Model
  7.2.1 SaaS Subscription
  7.2.2 Data-as-a-Service and Usage-Based
  7.2.3 Media and Performance-Based
  7.2.4 Project-Based Professional Services
  7.2.5 Others
7.3 Market Segment by Delivery and Commercial Model
  7.3.1 World B2B Digital Marketing Market Size by Delivery and Commercial Model (2021-2026)
  7.3.2 World B2B Digital Marketing Market Size by Delivery and Commercial Model (2027-2032)
  7.3.3 World B2B Digital Marketing Market Size Market Share by Delivery and Commercial Model (2027-2032)

**8 MARKET ANALYSIS BY APPLICATION**

8.1 World B2B Digital Marketing Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Software and Telecommunications
  8.2.2 Industrial and Manufacturing
  8.2.3 Professional and Business Services
  8.2.4 Others
8.3 Market Segment by Application
  8.3.1 World B2B Digital Marketing Market Size by Application (2021-2026)
  8.3.2 World B2B Digital Marketing Market Size by Application (2027-2032)
  8.3.3 World B2B Digital Marketing Market Size Market Share by Application (2021-2032)

**9 COMPANY PROFILES**

9.1 Microsoft Corporation
  9.1.1 Microsoft Corporation Details
  9.1.2 Microsoft Corporation Major Business
  9.1.3 Microsoft Corporation B2B Digital Marketing Product and Services
  9.1.4 Microsoft Corporation B2B Digital Marketing Revenue, Gross Margin and Market

+357 96 030922
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Share (2021-2026)
9.1.5 Microsoft Corporation Recent Developments/Updates
9.1.6 Microsoft Corporation Competitive Strengths & Weaknesses
9.2 Salesforce, Inc.
9.2.1 Salesforce, Inc. Details
9.2.2 Salesforce, Inc. Major Business
9.2.3 Salesforce, Inc. B2B Digital Marketing Product and Services
9.2.4 Salesforce, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 Salesforce, Inc. Recent Developments/Updates
9.2.6 Salesforce, Inc. Competitive Strengths & Weaknesses
9.3 HubSpot, Inc.
9.3.1 HubSpot, Inc. Details
9.3.2 HubSpot, Inc. Major Business
9.3.3 HubSpot, Inc. B2B Digital Marketing Product and Services
9.3.4 HubSpot, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 HubSpot, Inc. Recent Developments/Updates
9.3.6 HubSpot, Inc. Competitive Strengths & Weaknesses
9.4 Adobe Inc.
9.4.1 Adobe Inc. Details
9.4.2 Adobe Inc. Major Business
9.4.3 Adobe Inc. B2B Digital Marketing Product and Services
9.4.4 Adobe Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Adobe Inc. Recent Developments/Updates
9.4.6 Adobe Inc. Competitive Strengths & Weaknesses
9.5 WPP plc
9.5.1 WPP plc Details
9.5.2 WPP plc Major Business
9.5.3 WPP plc B2B Digital Marketing Product and Services
9.5.4 WPP plc B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 WPP plc Recent Developments/Updates
9.5.6 WPP plc Competitive Strengths & Weaknesses
9.6 Publicis Groupe S.A.
9.6.1 Publicis Groupe S.A. Details
9.6.2 Publicis Groupe S.A. Major Business
9.6.3 Publicis Groupe S.A. B2B Digital Marketing Product and Services

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9.6.4 Publicis Groupe S.A. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Publicis Groupe S.A. Recent Developments/Updates
9.6.6 Publicis Groupe S.A. Competitive Strengths & Weaknesses
9.7 Omnicom Group Inc.
9.7.1 Omnicom Group Inc. Details
9.7.2 Omnicom Group Inc. Major Business
9.7.3 Omnicom Group Inc. B2B Digital Marketing Product and Services
9.7.4 Omnicom Group Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Omnicom Group Inc. Recent Developments/Updates
9.7.6 Omnicom Group Inc. Competitive Strengths & Weaknesses
9.8 Accenture plc
9.8.1 Accenture plc Details
9.8.2 Accenture plc Major Business
9.8.3 Accenture plc B2B Digital Marketing Product and Services
9.8.4 Accenture plc B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 Accenture plc Recent Developments/Updates
9.8.6 Accenture plc Competitive Strengths & Weaknesses
9.9 Dentsu Group Inc.
9.9.1 Dentsu Group Inc. Details
9.9.2 Dentsu Group Inc. Major Business
9.9.3 Dentsu Group Inc. B2B Digital Marketing Product and Services
9.9.4 Dentsu Group Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Dentsu Group Inc. Recent Developments/Updates
9.9.6 Dentsu Group Inc. Competitive Strengths & Weaknesses
9.10 Oracle Corporation
9.10.1 Oracle Corporation Details
9.10.2 Oracle Corporation Major Business
9.10.3 Oracle Corporation B2B Digital Marketing Product and Services
9.10.4 Oracle Corporation B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 Oracle Corporation Recent Developments/Updates
9.10.6 Oracle Corporation Competitive Strengths & Weaknesses
9.11 ZoomInfo Technologies Inc.
9.11.1 ZoomInfo Technologies Inc. Details
9.11.2 ZoomInfo Technologies Inc. Major Business

+357 96 030922
info@marketpublishers.com

9.11.3 ZoomInfo Technologies Inc. B2B Digital Marketing Product and Services
9.11.4 ZoomInfo Technologies Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 ZoomInfo Technologies Inc. Recent Developments/Updates
9.11.6 ZoomInfo Technologies Inc. Competitive Strengths & Weaknesses
9.12 Dun & Bradstreet Holdings, Inc.
9.12.1 Dun & Bradstreet Holdings, Inc. Details
9.12.2 Dun & Bradstreet Holdings, Inc. Major Business
9.12.3 Dun & Bradstreet Holdings, Inc. B2B Digital Marketing Product and Services
9.12.4 Dun & Bradstreet Holdings, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 Dun & Bradstreet Holdings, Inc. Recent Developments/Updates
9.12.6 Dun & Bradstreet Holdings, Inc. Competitive Strengths & Weaknesses
9.13 Informa TechTarget, Inc.
9.13.1 Informa TechTarget, Inc. Details
9.13.2 Informa TechTarget, Inc. Major Business
9.13.3 Informa TechTarget, Inc. B2B Digital Marketing Product and Services
9.13.4 Informa TechTarget, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 Informa TechTarget, Inc. Recent Developments/Updates
9.13.6 Informa TechTarget, Inc. Competitive Strengths & Weaknesses
9.14 6sense Insights, Inc.
9.14.1 6sense Insights, Inc. Details
9.14.2 6sense Insights, Inc. Major Business
9.14.3 6sense Insights, Inc. B2B Digital Marketing Product and Services
9.14.4 6sense Insights, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 6sense Insights, Inc. Recent Developments/Updates
9.14.6 6sense Insights, Inc. Competitive Strengths & Weaknesses
9.15 Demandbase, Inc.
9.15.1 Demandbase, Inc. Details
9.15.2 Demandbase, Inc. Major Business
9.15.3 Demandbase, Inc. B2B Digital Marketing Product and Services
9.15.4 Demandbase, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 Demandbase, Inc. Recent Developments/Updates
9.15.6 Demandbase, Inc. Competitive Strengths & Weaknesses
9.16 Anteriad
9.16.1 Anteriad Details

+357 96 030922
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9.16.2 Anteriad Major Business
9.16.3 Anteriad B2B Digital Marketing Product and Services
9.16.4 Anteriad B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Anteriad Recent Developments/Updates
9.16.6 Anteriad Competitive Strengths & Weaknesses
9.17 DemandScience
9.17.1 DemandScience Details
9.17.2 DemandScience Major Business
9.17.3 DemandScience B2B Digital Marketing Product and Services
9.17.4 DemandScience B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.17.5 DemandScience Recent Developments/Updates
9.17.6 DemandScience Competitive Strengths & Weaknesses
9.18 NextRoll, Inc.
9.18.1 NextRoll, Inc. Details
9.18.2 NextRoll, Inc. Major Business
9.18.3 NextRoll, Inc. B2B Digital Marketing Product and Services
9.18.4 NextRoll, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 NextRoll, Inc. Recent Developments/Updates
9.18.6 NextRoll, Inc. Competitive Strengths & Weaknesses
9.19 G2.com, Inc.
9.19.1 G2.com, Inc. Details
9.19.2 G2.com, Inc. Major Business
9.19.3 G2.com, Inc. B2B Digital Marketing Product and Services
9.19.4 G2.com, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.19.5 G2.com, Inc. Recent Developments/Updates
9.19.6 G2.com, Inc. Competitive Strengths & Weaknesses
9.20 Madison Logic, Inc.
9.20.1 Madison Logic, Inc. Details
9.20.2 Madison Logic, Inc. Major Business
9.20.3 Madison Logic, Inc. B2B Digital Marketing Product and Services
9.20.4 Madison Logic, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.20.5 Madison Logic, Inc. Recent Developments/Updates
9.20.6 Madison Logic, Inc. Competitive Strengths & Weaknesses
9.21 Qualified.com, Inc.

+357 96 030922
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9.21.1 Qualified.com, Inc. Details
9.21.2 Qualified.com, Inc. Major Business
9.21.3 Qualified.com, Inc. B2B Digital Marketing Product and Services
9.21.4 Qualified.com, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.21.5 Qualified.com, Inc. Recent Developments/Updates
9.21.6 Qualified.com, Inc. Competitive Strengths & Weaknesses
9.22 Albacross Nordic AB
9.22.1 Albacross Nordic AB Details
9.22.2 Albacross Nordic AB Major Business
9.22.3 Albacross Nordic AB B2B Digital Marketing Product and Services
9.22.4 Albacross Nordic AB B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.22.5 Albacross Nordic AB Recent Developments/Updates
9.22.6 Albacross Nordic AB Competitive Strengths & Weaknesses
9.23 Leadspace, Inc.
9.23.1 Leadspace, Inc. Details
9.23.2 Leadspace, Inc. Major Business
9.23.3 Leadspace, Inc. B2B Digital Marketing Product and Services
9.23.4 Leadspace, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.23.5 Leadspace, Inc. Recent Developments/Updates
9.23.6 Leadspace, Inc. Competitive Strengths & Weaknesses
9.24 Common Room, Inc.
9.24.1 Common Room, Inc. Details
9.24.2 Common Room, Inc. Major Business
9.24.3 Common Room, Inc. B2B Digital Marketing Product and Services
9.24.4 Common Room, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.24.5 Common Room, Inc. Recent Developments/Updates
9.24.6 Common Room, Inc. Competitive Strengths & Weaknesses
9.25 Mutiny, Inc.
9.25.1 Mutiny, Inc. Details
9.25.2 Mutiny, Inc. Major Business
9.25.3 Mutiny, Inc. B2B Digital Marketing Product and Services
9.25.4 Mutiny, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.25.5 Mutiny, Inc. Recent Developments/Updates
9.25.6 Mutiny, Inc. Competitive Strengths & Weaknesses

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info@marketpublishers.com

9.26 Warmly, Inc.
9.26.1 Warmly, Inc. Details
9.26.2 Warmly, Inc. Major Business
9.26.3 Warmly, Inc. B2B Digital Marketing Product and Services
9.26.4 Warmly, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.26.5 Warmly, Inc. Recent Developments/Updates
9.26.6 Warmly, Inc. Competitive Strengths & Weaknesses
9.27 Sopro
9.27.1 Sopro Details
9.27.2 Sopro Major Business
9.27.3 Sopro B2B Digital Marketing Product and Services
9.27.4 Sopro B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.27.5 Sopro Recent Developments/Updates
9.27.6 Sopro Competitive Strengths & Weaknesses
9.28 MOI Global
9.28.1 MOI Global Details
9.28.2 MOI Global Major Business
9.28.3 MOI Global B2B Digital Marketing Product and Services
9.28.4 MOI Global B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.28.5 MOI Global Recent Developments/Updates
9.28.6 MOI Global Competitive Strengths & Weaknesses
9.29 JINGdigital
9.29.1 JINGdigital Details
9.29.2 JINGdigital Major Business
9.29.3 JINGdigital B2B Digital Marketing Product and Services
9.29.4 JINGdigital B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.29.5 JINGdigital Recent Developments/Updates
9.29.6 JINGdigital Competitive Strengths & Weaknesses
9.30 Beschannels
9.30.1 Beschannels Details
9.30.2 Beschannels Major Business
9.30.3 Beschannels B2B Digital Marketing Product and Services
9.30.4 Beschannels B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.30.5 Beschannels Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.30.6 Beschannels Competitive Strengths & Weaknesses
9.31 Convertlab
9.31.1 Convertlab Details
9.31.2 Convertlab Major Business
9.31.3 Convertlab B2B Digital Marketing Product and Services
9.31.4 Convertlab B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.31.5 Convertlab Recent Developments/Updates
9.31.6 Convertlab Competitive Strengths & Weaknesses
9.32 Focussend
9.32.1 Focussend Details
9.32.2 Focussend Major Business
9.32.3 Focussend B2B Digital Marketing Product and Services
9.32.4 Focussend B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.32.5 Focussend Recent Developments/Updates
9.32.6 Focussend Competitive Strengths & Weaknesses
9.33 Tungee
9.33.1 Tungee Details
9.33.2 Tungee Major Business
9.33.3 Tungee B2B Digital Marketing Product and Services
9.33.4 Tungee B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.33.5 Tungee Recent Developments/Updates
9.33.6 Tungee Competitive Strengths & Weaknesses
9.34 SATORI, Inc.
9.34.1 SATORI, Inc. Details
9.34.2 SATORI, Inc. Major Business
9.34.3 SATORI, Inc. B2B Digital Marketing Product and Services
9.34.4 SATORI, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026)
9.34.5 SATORI, Inc. Recent Developments/Updates
9.34.6 SATORI, Inc. Competitive Strengths & Weaknesses

## 10 INDUSTRY CHAIN ANALYSIS

10.1 B2B Digital Marketing Industry Chain
10.2 B2B Digital Marketing Upstream Analysis
10.3 B2B Digital Marketing Midstream Analysis

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10.4 B2B Digital Marketing Downstream Analysis

**11 RESEARCH FINDINGS AND CONCLUSION**

**12 APPENDIX**

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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# List Of Tables

## LIST OF TABLES

Table 1. World B2B Digital Marketing Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World B2B Digital Marketing Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World B2B Digital Marketing Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World B2B Digital Marketing Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World B2B Digital Marketing Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World B2B Digital Marketing Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World B2B Digital Marketing Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World B2B Digital Marketing Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World B2B Digital Marketing Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key B2B Digital Marketing Players in 2025
Table 12. World B2B Digital Marketing Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global B2B Digital Marketing Company Evaluation Quadrant
Table 14. Head Office of Key B2B Digital Marketing Players
Table 15. B2B Digital Marketing Market: Company Product Type Footprint
Table 16. B2B Digital Marketing Market: Company Product Application Footprint
Table 17. B2B Digital Marketing Mergers & Acquisitions Activity
Table 18. United States VS China B2B Digital Marketing Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China B2B Digital Marketing Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based B2B Digital Marketing Companies, Headquarters (States, Country)
Table 21. United States Based Companies B2B Digital Marketing Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies B2B Digital Marketing Revenue Market

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Share (2021-2026)
Table 23. China Based B2B Digital Marketing Companies, Headquarters (Province, Country)
Table 24. China Based Companies B2B Digital Marketing Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies B2B Digital Marketing Revenue Market Share (2021-2026)
Table 26. Rest of World Based B2B Digital Marketing Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies B2B Digital Marketing Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies B2B Digital Marketing Revenue Market Share (2021-2026)
Table 29. World B2B Digital Marketing Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World B2B Digital Marketing Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World B2B Digital Marketing Market Size by Type (2027-2032) & (USD Million)
Table 32. World B2B Digital Marketing Market Size by Primary Marketing Objective, (USD Million), 2021 & 2025 & 2032
Table 33. World B2B Digital Marketing Market Size Value by Primary Marketing Objective (2021-2026) & (USD Million)
Table 34. World B2B Digital Marketing Market Size by Primary Marketing Objective (2027-2032) & (USD Million)
Table 35. World B2B Digital Marketing Market Size by Delivery and Commercial Model, (USD Million), 2021 & 2025 & 2032
Table 36. World B2B Digital Marketing Market Size Value by Delivery and Commercial Model (2021-2026) & (USD Million)
Table 37. World B2B Digital Marketing Market Size by Delivery and Commercial Model (2027-2032) & (USD Million)
Table 38. World B2B Digital Marketing Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World B2B Digital Marketing Market Size by Application (2021-2026) & (USD Million)
Table 40. World B2B Digital Marketing Market Size by Application (2027-2032) & (USD Million)
Table 41. Microsoft Corporation Basic Information, Manufacturing Base and Competitors

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Table 42. Microsoft Corporation Major Business
Table 43. Microsoft Corporation B2B Digital Marketing Product and Services
Table 44. Microsoft Corporation B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Microsoft Corporation Recent Developments/Updates
Table 46. Microsoft Corporation Competitive Strengths & Weaknesses
Table 47. Salesforce, Inc. Basic Information, Manufacturing Base and Competitors
Table 48. Salesforce, Inc. Major Business
Table 49. Salesforce, Inc. B2B Digital Marketing Product and Services
Table 50. Salesforce, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Salesforce, Inc. Recent Developments/Updates
Table 52. Salesforce, Inc. Competitive Strengths & Weaknesses
Table 53. HubSpot, Inc. Basic Information, Manufacturing Base and Competitors
Table 54. HubSpot, Inc. Major Business
Table 55. HubSpot, Inc. B2B Digital Marketing Product and Services
Table 56. HubSpot, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. HubSpot, Inc. Recent Developments/Updates
Table 58. HubSpot, Inc. Competitive Strengths & Weaknesses
Table 59. Adobe Inc. Basic Information, Manufacturing Base and Competitors
Table 60. Adobe Inc. Major Business
Table 61. Adobe Inc. B2B Digital Marketing Product and Services
Table 62. Adobe Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Adobe Inc. Recent Developments/Updates
Table 64. Adobe Inc. Competitive Strengths & Weaknesses
Table 65. WPP plc Basic Information, Manufacturing Base and Competitors
Table 66. WPP plc Major Business
Table 67. WPP plc B2B Digital Marketing Product and Services
Table 68. WPP plc B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. WPP plc Recent Developments/Updates
Table 70. WPP plc Competitive Strengths & Weaknesses
Table 71. Publicis Groupe S.A. Basic Information, Manufacturing Base and Competitors
Table 72. Publicis Groupe S.A. Major Business
Table 73. Publicis Groupe S.A. B2B Digital Marketing Product and Services
Table 74. Publicis Groupe S.A. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 75. Publicis Groupe S.A. Recent Developments/Updates
Table 76. Publicis Groupe S.A. Competitive Strengths & Weaknesses
Table 77. Omnicom Group Inc. Basic Information, Manufacturing Base and Competitors
Table 78. Omnicom Group Inc. Major Business
Table 79. Omnicom Group Inc. B2B Digital Marketing Product and Services
Table 80. Omnicom Group Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Omnicom Group Inc. Recent Developments/Updates
Table 82. Omnicom Group Inc. Competitive Strengths & Weaknesses
Table 83. Accenture plc Basic Information, Manufacturing Base and Competitors
Table 84. Accenture plc Major Business
Table 85. Accenture plc B2B Digital Marketing Product and Services
Table 86. Accenture plc B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Accenture plc Recent Developments/Updates
Table 88. Accenture plc Competitive Strengths & Weaknesses
Table 89. Dentsu Group Inc. Basic Information, Manufacturing Base and Competitors
Table 90. Dentsu Group Inc. Major Business
Table 91. Dentsu Group Inc. B2B Digital Marketing Product and Services
Table 92. Dentsu Group Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Dentsu Group Inc. Recent Developments/Updates
Table 94. Dentsu Group Inc. Competitive Strengths & Weaknesses
Table 95. Oracle Corporation Basic Information, Manufacturing Base and Competitors
Table 96. Oracle Corporation Major Business
Table 97. Oracle Corporation B2B Digital Marketing Product and Services
Table 98. Oracle Corporation B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Oracle Corporation Recent Developments/Updates
Table 100. Oracle Corporation Competitive Strengths & Weaknesses
Table 101. ZoomInfo Technologies Inc. Basic Information, Manufacturing Base and Competitors
Table 102. ZoomInfo Technologies Inc. Major Business
Table 103. ZoomInfo Technologies Inc. B2B Digital Marketing Product and Services
Table 104. ZoomInfo Technologies Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. ZoomInfo Technologies Inc. Recent Developments/Updates
Table 106. ZoomInfo Technologies Inc. Competitive Strengths & Weaknesses
Table 107. Dun & Bradstreet Holdings, Inc. Basic Information, Manufacturing Base and

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Competitors
Table 108. Dun & Bradstreet Holdings, Inc. Major Business
Table 109. Dun & Bradstreet Holdings, Inc. B2B Digital Marketing Product and Services
Table 110. Dun & Bradstreet Holdings, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. Dun & Bradstreet Holdings, Inc. Recent Developments/Updates
Table 112. Dun & Bradstreet Holdings, Inc. Competitive Strengths & Weaknesses
Table 113. Informa TechTarget, Inc. Basic Information, Manufacturing Base and Competitors
Table 114. Informa TechTarget, Inc. Major Business
Table 115. Informa TechTarget, Inc. B2B Digital Marketing Product and Services
Table 116. Informa TechTarget, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Informa TechTarget, Inc. Recent Developments/Updates
Table 118. Informa TechTarget, Inc. Competitive Strengths & Weaknesses
Table 119. 6sense Insights, Inc. Basic Information, Manufacturing Base and Competitors
Table 120. 6sense Insights, Inc. Major Business
Table 121. 6sense Insights, Inc. B2B Digital Marketing Product and Services
Table 122. 6sense Insights, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. 6sense Insights, Inc. Recent Developments/Updates
Table 124. 6sense Insights, Inc. Competitive Strengths & Weaknesses
Table 125. Demandbase, Inc. Basic Information, Manufacturing Base and Competitors
Table 126. Demandbase, Inc. Major Business
Table 127. Demandbase, Inc. B2B Digital Marketing Product and Services
Table 128. Demandbase, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. Demandbase, Inc. Recent Developments/Updates
Table 130. Demandbase, Inc. Competitive Strengths & Weaknesses
Table 131. Anteriad Basic Information, Manufacturing Base and Competitors
Table 132. Anteriad Major Business
Table 133. Anteriad B2B Digital Marketing Product and Services
Table 134. Anteriad B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Anteriad Recent Developments/Updates
Table 136. Anteriad Competitive Strengths & Weaknesses
Table 137. DemandScience Basic Information, Manufacturing Base and Competitors
Table 138. DemandScience Major Business

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Table 139. DemandScience B2B Digital Marketing Product and Services
Table 140. DemandScience B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. DemandScience Recent Developments/Updates
Table 142. DemandScience Competitive Strengths & Weaknesses
Table 143. NextRoll, Inc. Basic Information, Manufacturing Base and Competitors
Table 144. NextRoll, Inc. Major Business
Table 145. NextRoll, Inc. B2B Digital Marketing Product and Services
Table 146. NextRoll, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. NextRoll, Inc. Recent Developments/Updates
Table 148. NextRoll, Inc. Competitive Strengths & Weaknesses
Table 149. G2.com, Inc. Basic Information, Manufacturing Base and Competitors
Table 150. G2.com, Inc. Major Business
Table 151. G2.com, Inc. B2B Digital Marketing Product and Services
Table 152. G2.com, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. G2.com, Inc. Recent Developments/Updates
Table 154. G2.com, Inc. Competitive Strengths & Weaknesses
Table 155. Madison Logic, Inc. Basic Information, Manufacturing Base and Competitors
Table 156. Madison Logic, Inc. Major Business
Table 157. Madison Logic, Inc. B2B Digital Marketing Product and Services
Table 158. Madison Logic, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 159. Madison Logic, Inc. Recent Developments/Updates
Table 160. Madison Logic, Inc. Competitive Strengths & Weaknesses
Table 161. Qualified.com, Inc. Basic Information, Manufacturing Base and Competitors
Table 162. Qualified.com, Inc. Major Business
Table 163. Qualified.com, Inc. B2B Digital Marketing Product and Services
Table 164. Qualified.com, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 165. Qualified.com, Inc. Recent Developments/Updates
Table 166. Qualified.com, Inc. Competitive Strengths & Weaknesses
Table 167. Albacross Nordic AB Basic Information, Manufacturing Base and Competitors
Table 168. Albacross Nordic AB Major Business
Table 169. Albacross Nordic AB B2B Digital Marketing Product and Services
Table 170. Albacross Nordic AB B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 171. Albacross Nordic AB Recent Developments/Updates
Table 172. Albacross Nordic AB Competitive Strengths & Weaknesses
Table 173. Leadspace, Inc. Basic Information, Manufacturing Base and Competitors
Table 174. Leadspace, Inc. Major Business
Table 175. Leadspace, Inc. B2B Digital Marketing Product and Services
Table 176. Leadspace, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 177. Leadspace, Inc. Recent Developments/Updates
Table 178. Leadspace, Inc. Competitive Strengths & Weaknesses
Table 179. Common Room, Inc. Basic Information, Manufacturing Base and Competitors
Table 180. Common Room, Inc. Major Business
Table 181. Common Room, Inc. B2B Digital Marketing Product and Services
Table 182. Common Room, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 183. Common Room, Inc. Recent Developments/Updates
Table 184. Common Room, Inc. Competitive Strengths & Weaknesses
Table 185. Mutiny, Inc. Basic Information, Manufacturing Base and Competitors
Table 186. Mutiny, Inc. Major Business
Table 187. Mutiny, Inc. B2B Digital Marketing Product and Services
Table 188. Mutiny, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 189. Mutiny, Inc. Recent Developments/Updates
Table 190. Mutiny, Inc. Competitive Strengths & Weaknesses
Table 191. Warmly, Inc. Basic Information, Manufacturing Base and Competitors
Table 192. Warmly, Inc. Major Business
Table 193. Warmly, Inc. B2B Digital Marketing Product and Services
Table 194. Warmly, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 195. Warmly, Inc. Recent Developments/Updates
Table 196. Warmly, Inc. Competitive Strengths & Weaknesses
Table 197. Sopro Basic Information, Manufacturing Base and Competitors
Table 198. Sopro Major Business
Table 199. Sopro B2B Digital Marketing Product and Services
Table 200. Sopro B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 201. Sopro Recent Developments/Updates
Table 202. Sopro Competitive Strengths & Weaknesses
Table 203. MOI Global Basic Information, Manufacturing Base and Competitors

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Table 204. MOI Global Major Business
Table 205. MOI Global B2B Digital Marketing Product and Services
Table 206. MOI Global B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 207. MOI Global Recent Developments/Updates
Table 208. MOI Global Competitive Strengths & Weaknesses
Table 209. JINGdigital Basic Information, Manufacturing Base and Competitors
Table 210. JINGdigital Major Business
Table 211. JINGdigital B2B Digital Marketing Product and Services
Table 212. JINGdigital B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 213. JINGdigital Recent Developments/Updates
Table 214. JINGdigital Competitive Strengths & Weaknesses
Table 215. Beschannels Basic Information, Manufacturing Base and Competitors
Table 216. Beschannels Major Business
Table 217. Beschannels B2B Digital Marketing Product and Services
Table 218. Beschannels B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 219. Beschannels Recent Developments/Updates
Table 220. Beschannels Competitive Strengths & Weaknesses
Table 221. Convertlab Basic Information, Manufacturing Base and Competitors
Table 222. Convertlab Major Business
Table 223. Convertlab B2B Digital Marketing Product and Services
Table 224. Convertlab B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 225. Convertlab Recent Developments/Updates
Table 226. Convertlab Competitive Strengths & Weaknesses
Table 227. Focussend Basic Information, Manufacturing Base and Competitors
Table 228. Focussend Major Business
Table 229. Focussend B2B Digital Marketing Product and Services
Table 230. Focussend B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 231. Focussend Recent Developments/Updates
Table 232. Focussend Competitive Strengths & Weaknesses
Table 233. Tungee Basic Information, Manufacturing Base and Competitors
Table 234. Tungee Major Business
Table 235. Tungee B2B Digital Marketing Product and Services
Table 236. Tungee B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 237. Tungee Recent Developments/Updates
Table 238. Tungee Competitive Strengths & Weaknesses
Table 239. SATORI, Inc. Basic Information, Manufacturing Base and Competitors
Table 240. SATORI, Inc. Major Business
Table 241. SATORI, Inc. B2B Digital Marketing Product and Services
Table 242. SATORI, Inc. B2B Digital Marketing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 243. SATORI, Inc. Recent Developments/Updates
Table 244. SATORI, Inc. Competitive Strengths & Weaknesses
Table 245. Global Key Players of B2B Digital Marketing Upstream (Raw Materials)
Table 246. Global B2B Digital Marketing Typical Customers

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# List Of Figures

## LIST OF FIGURES

Figure 1. B2B Digital Marketing Picture
Figure 2. World B2B Digital Marketing Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World B2B Digital Marketing Total Revenue (2021-2032) & (USD Million)
Figure 4. World B2B Digital Marketing Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World B2B Digital Marketing Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company B2B Digital Marketing Revenue (2021-2032) & (USD Million)
Figure 13. B2B Digital Marketing Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 16. World B2B Digital Marketing Consumption Value Market Share by Region (2021-2032)
Figure 17. United States B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 18. China B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 20. Japan B2B Digital Marketing Consumption Value (2021-2032) & (USD

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Million)
Figure 21. South Korea B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 23. India B2B Digital Marketing Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of B2B Digital Marketing by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for B2B Digital Marketing Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for B2B Digital Marketing Markets in 2025
Figure 27. United States VS China: B2B Digital Marketing Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: B2B Digital Marketing Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World B2B Digital Marketing Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World B2B Digital Marketing Market Size Market Share by Type in 2025
Figure 31. Managed Services and Specialist Agencies
Figure 32. Marketing Automation and Journey Orchestration
Figure 33. Account-Based Marketing and Account Orchestration
Figure 34. Others
Figure 35. World B2B Digital Marketing Market Size Market Share by Type (2021-2032)
Figure 36. World B2B Digital Marketing Market Size by Primary Marketing Objective, (USD Million), 2021 & 2025 & 2032
Figure 37. World B2B Digital Marketing Market Size Market Share by Primary Marketing Objective in 2025
Figure 38. Brand Awareness and Category Creation
Figure 39. Demand Generation and Lead Acquisition
Figure 40. Lead Nurturing and Opportunity Conversion
Figure 41. Others
Figure 42. World B2B Digital Marketing Market Size Market Share by Primary Marketing Objective (2021-2032)
Figure 43. World B2B Digital Marketing Market Size by Delivery and Commercial Model, (USD Million), 2021 & 2025 & 2032
Figure 44. World B2B Digital Marketing Market Size Market Share by Delivery and Commercial Model in 2025
Figure 45. SaaS Subscription

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Figure 46. Data-as-a-Service and Usage-Based
Figure 47. Media and Performance-Based
Figure 48. Project-Based Professional Services
Figure 49. Others
Figure 50. World B2B Digital Marketing Market Size Market Share by Delivery and Commercial Model (2021-2032)
Figure 51. World B2B Digital Marketing Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 52. World B2B Digital Marketing Market Size Market Share by Application in 2025
Figure 53. Software and Telecommunications
Figure 54. Industrial and Manufacturing
Figure 55. Professional and Business Services
Figure 56. Others
Figure 57. World B2B Digital Marketing Market Size Market Share by Application (2021-2032)
Figure 58. B2B Digital Marketing Industrial Chain
Figure 59. Methodology
Figure 60. Research Process and Data Source

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