

2025

B2B Sales & Marketing Benchmark Report



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Survey scope & methodology



Market conditions shift quickly. This data is a reference point, not legal or investment advice.

Questions about
the survey or the results?
Please email
rcohen@nvp.com



Audience

3rd annual survey
(fielded Aug 2025):

- **North America & Israel-** based **B2B** Norwest portfolio companies
- North American **VC- & PE-backed B2B** companies via 3rd parties



Focus Areas

Benchmarks around:

- Team size & structure
- Budgets
- Performance metrics
- GTM performance & priorities
- AI transformation



Respondents

177 leaders total:

- 77 from Norwest portfolio companies
- 100 from 3rd parties

Respondent summary



177
sales & marketing
leaders from
VC- and PE-backed
B2B companies



Sales vs Marketing

Sales	42%
Marketing	40%
Both	18%



Venture vs Private Equity

VC-backed	55%
PE-backed	29%
Both	15%



Deal Sizes (ACV)

> \$100K	41%
\$50-\$100K	37%
< \$50K	22%

Respondent revenue make-up



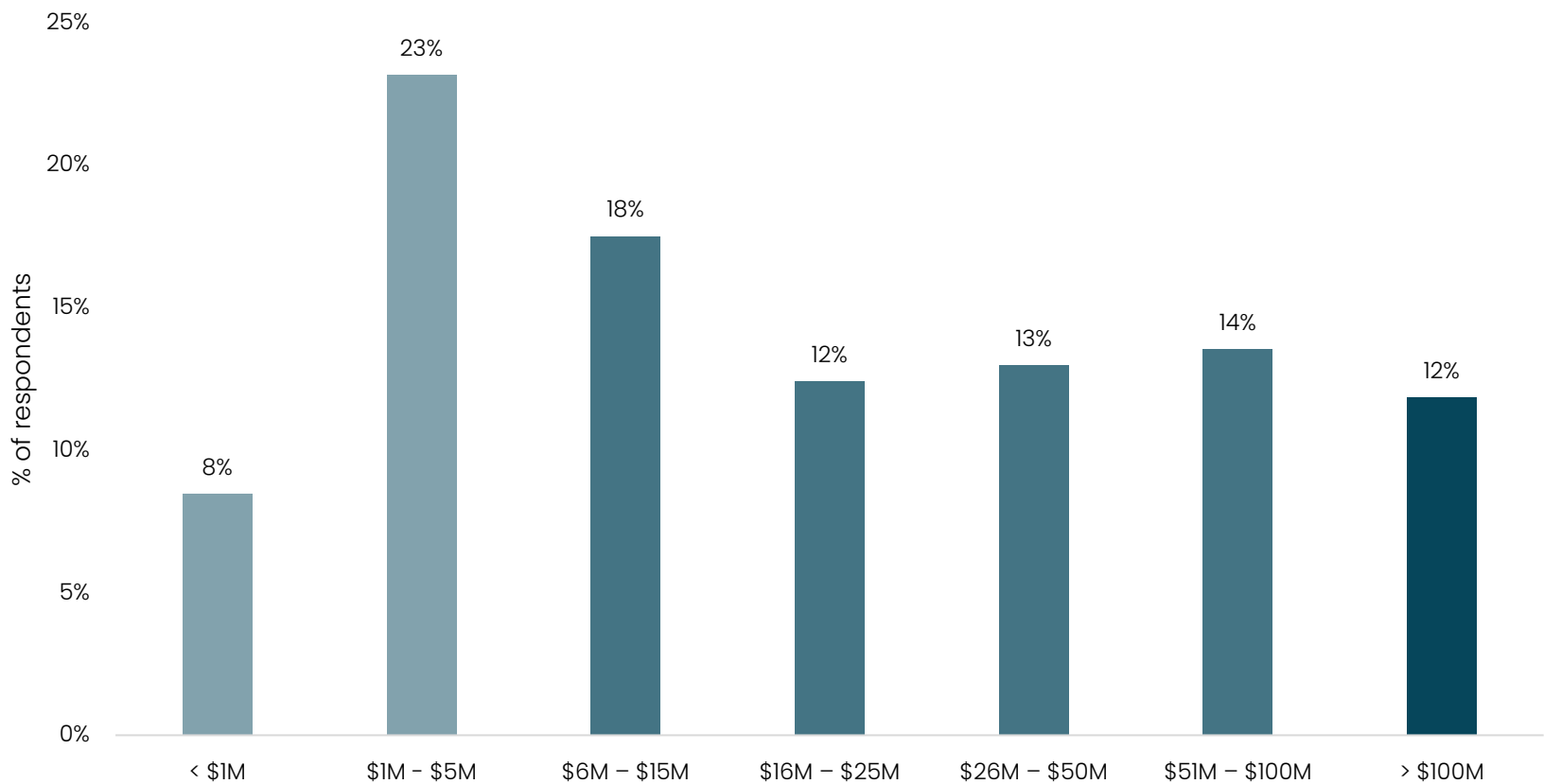
Organizations represent a mix of early-stage, mid-market, and later-stage VC/PE-backed companies

MID-MARKET
>\$50M-\$250M 26%

SCALE-UPS
\$16-\$50M 25%

START-UPS
≤ \$15M 49%

Respondents by revenue

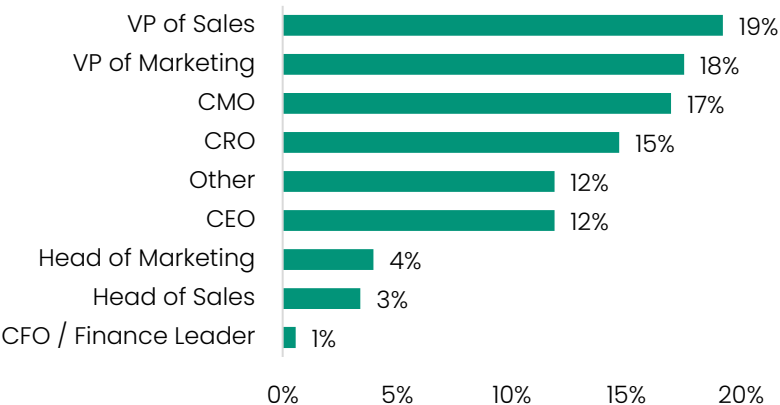


Respondent characteristics detail

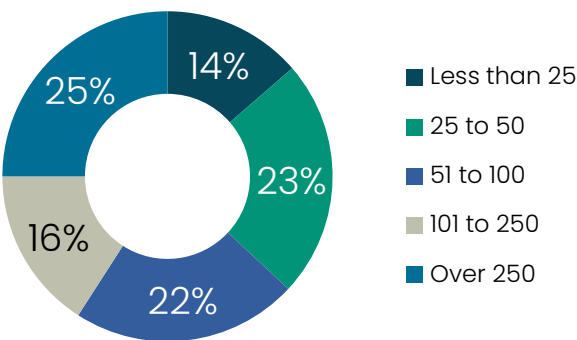
100%
B2B companies

92%
Executive-level leaders

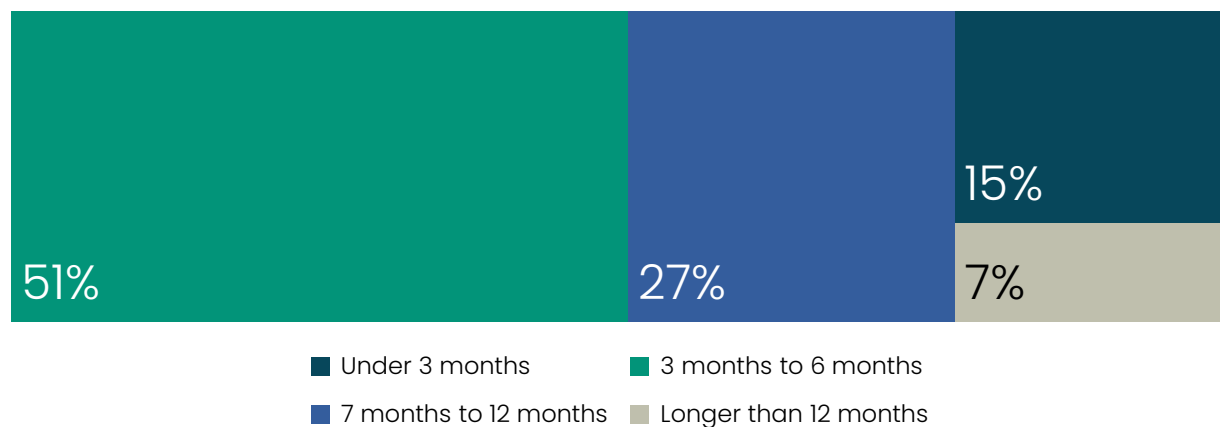
Respondents Titles



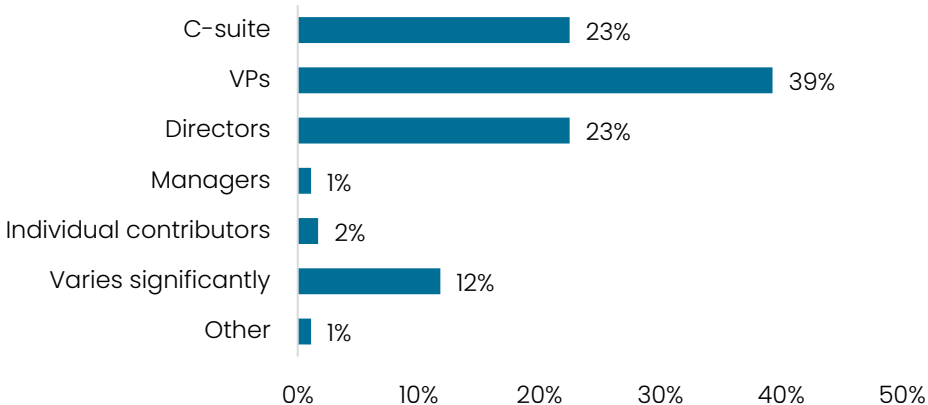
Number of Employees



Average Sales Cycle



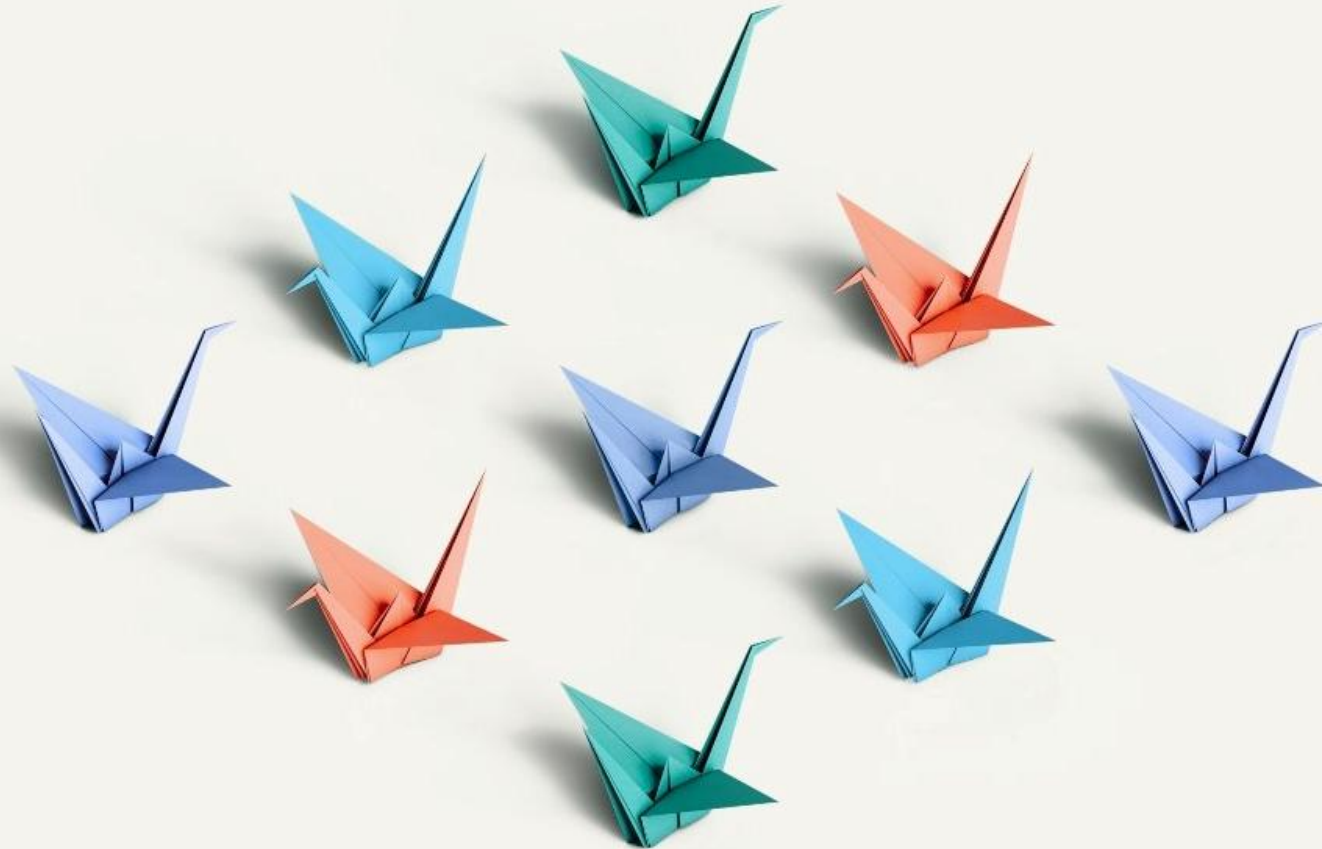
Roles Sold To



NORWEST

Key Takeaways

2025 B2B Sales & Marketing
Benchmark Survey



Marketing Budgets Continue to Contract, Making Efficiency and Measurable Impact Paramount

Though marketing budgets are continuing to decline, they have stabilized close to 2024 levels for mid-sized organizations.

Smaller organizations' marketing budgets appear to be more volatile, with <\$25M companies showing greater fluctuations YoY compared to the larger organizations.

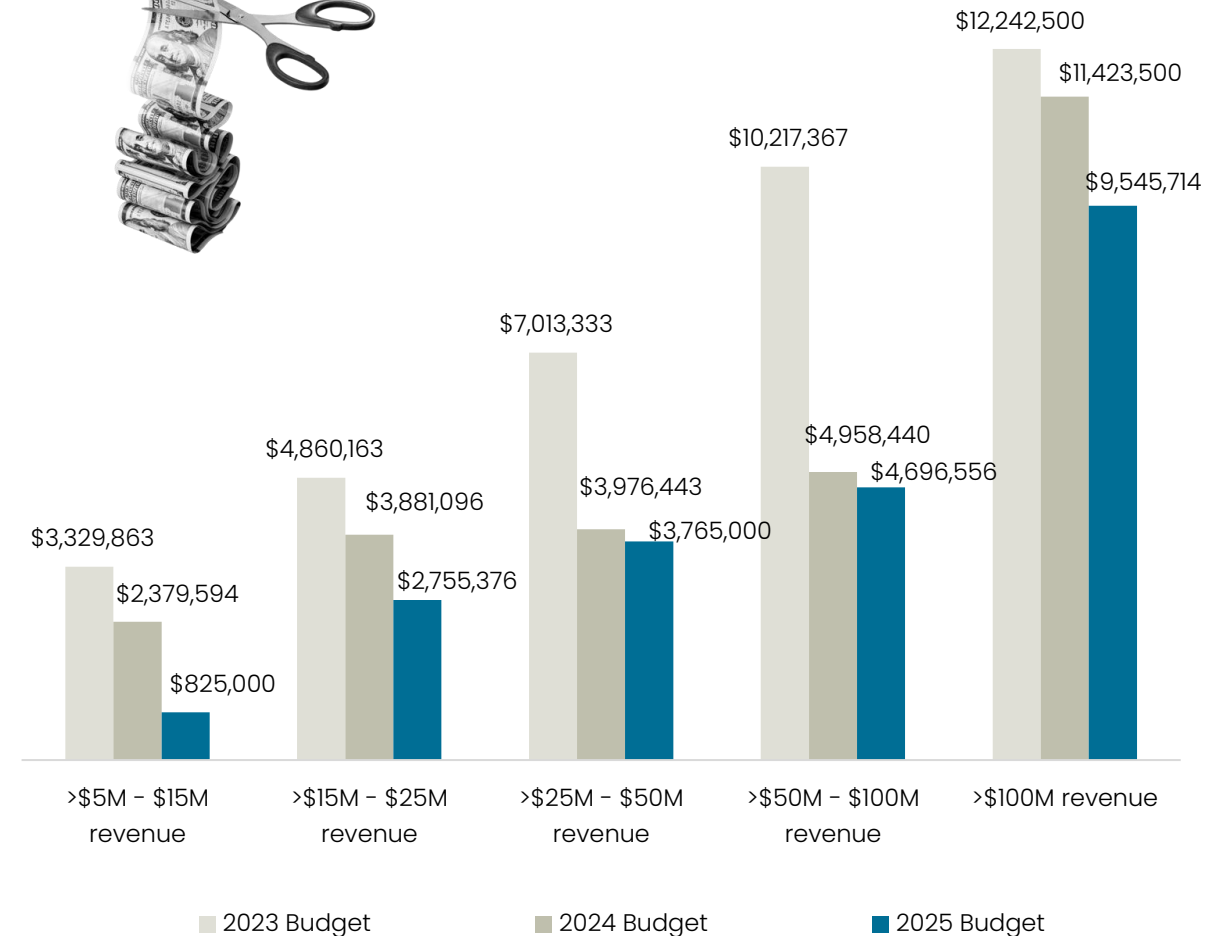


Our take:

Budget reductions in <\$25M organizations signal sharper pullback in marketing investment among earlier stage companies where limited cash runways, heavier dependence on investor funding, and pressure to demonstrate capital efficiency may be driving greater cuts to spend. Organizations >\$25M – \$100M show only moderate declines, with spend appearing to stabilize near 2024 levels after the 2023-2024 reset.

As dollars tighten, marketing leaders must focus on efficiency.

This means leveraging AI and streamlining processes—and demonstrating measurable ROI. Proving marketing’s direct impact on growth and showing it can be done cost-effectively will be critical for maintaining investment.



Product Positioning & Sales Cycles are **Top GTM Challenges in 2025**



In 2025, executives cite positioning products as “must-have” (44%) and longer sales cycles (43%) as the top GTM hurdles.

Longer sales cycles jumped 13 points YoY, signaling continued deal friction or complexity despite shorter actual durations ([see sales cycle data](#)).

Differentiation in crowded categories (33%, +6 pts) and budget scrutiny (35%, +12 pts) also rose, reinforcing pressure to prove ROI.

Our take:

The fundamentals hold, but urgency is higher. Positioning and deal velocity remain core drivers of GTM success, with buyers demanding clearer ROI and companies showing less resilience to extended cycles. The data reflects a market under greater strain, as competitors multiply and proof of value becomes essential.

To compete, executives should focus on deeper ICP research and ROI-tied messaging that directly map solutions to urgent buyer pain points. These investments create a stronger value narrative across every stage of the journey.

To counter increased scrutiny, executives should invest in seller enablement—competitive positioning tools, qualification training, and structured methodologies.

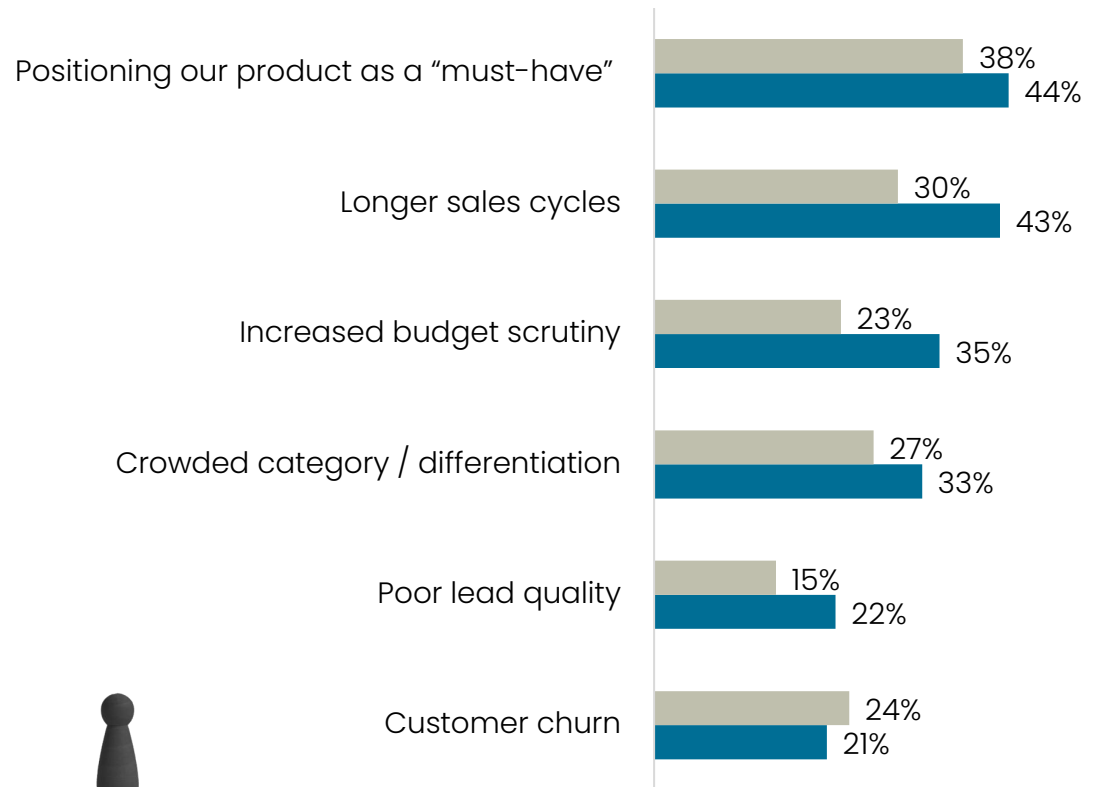
Clear value messaging paired with disciplined execution will be critical for 2025 growth.



What would you describe as your company's top three most pressing challenges impacting GTM and revenue growth in 2025?

Top 6 responses

■ 2024 ■ 2025



A Majority Indicated Reforecasting Revenue, More Often Raising Than Lowering Targets



Across all respondents, 66% reported materially reforecasting revenue in the last 12 months. The same percentage reported reforecasting in 2024.

Revenue target increases surpassed decreases, consistent with last year's trend, however the gap has narrowed slightly. 43% reported increasing targets (down from 48% in 2024), while 23% reported decreases (up from 18%).

PE-backed companies were more aggressive in revising their goals upward as compared to VC-backed companies.

Our take:

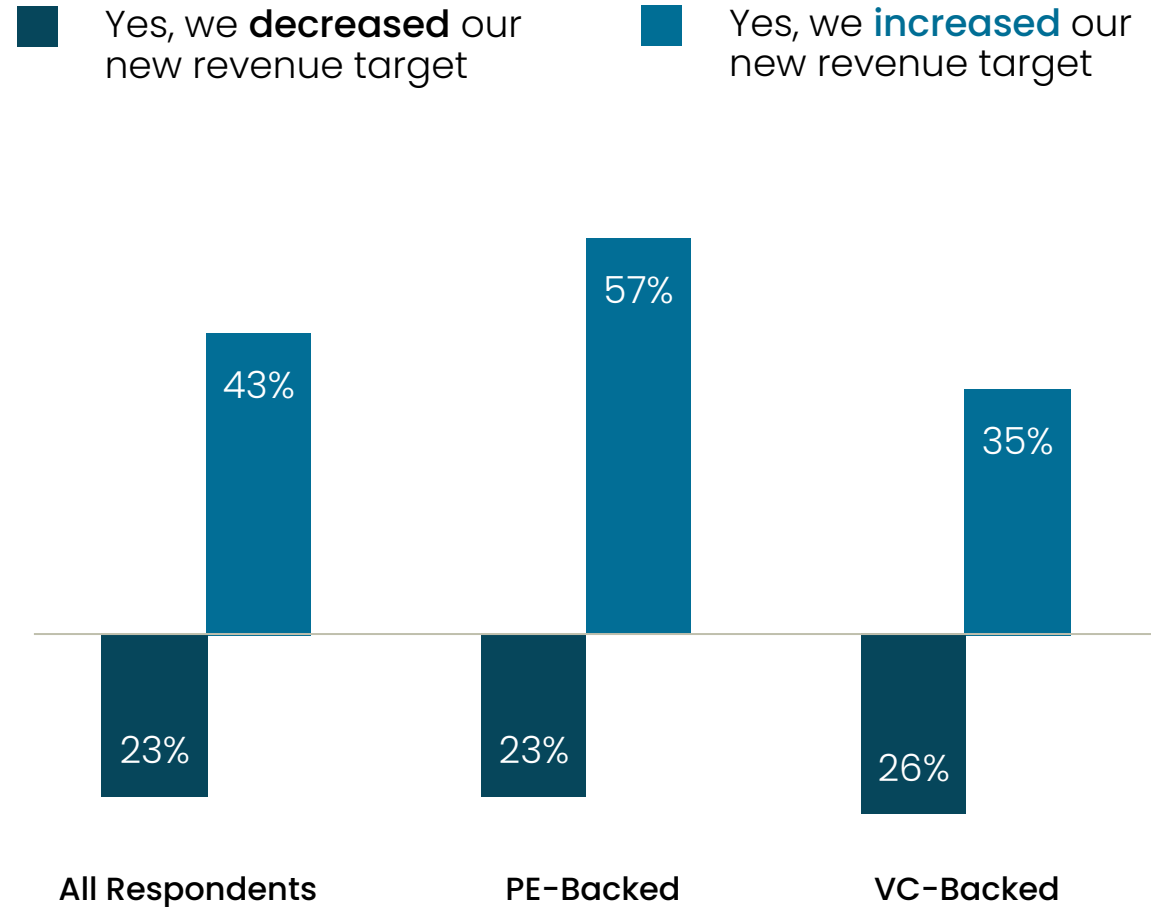
Revenue target increases continue to signal optimism in the market, though momentum has softened slightly compared to last year.



At the same time, the rise in downward revisions points to growing external pressures and a more cautious stance among some firms.

The data also indicates a slight confidence gap between PE- and VC-backed companies. PE-backed firms were more likely to increase revenue goals, while VC-backed firms were more balanced across expectations.

In the last 12 months, have you made any material reforecasting of your organization's revenue target?



Sales Cycles Lengthen as Deal Sizes Increase

Sales cycles lengthen with deal size, ranging from an average of ~2-3 months for <\$25K ACV deals to ~9-12 months for >\$500K ACV deals.



2025 results suggest sales cycles shortening over last year and more in line with 2023, likely reflecting a right-sizing effect after 2024 showed some lengthening (esp. in mid-market sales).

Our take:

Sales cycles reliably lengthen as ACVs increase, a reality that organizations must account for in coverage models and forecasts. While 2025 averages decreased from 2024, this may represent a normalization back to 2023 patterns following headwinds experienced in 2024, rather than a true acceleration in cycles.

Though cycle lengths haven't increased, organizations are increasingly citing extended sales cycles as a top challenge ([see Top Challenges](#)).

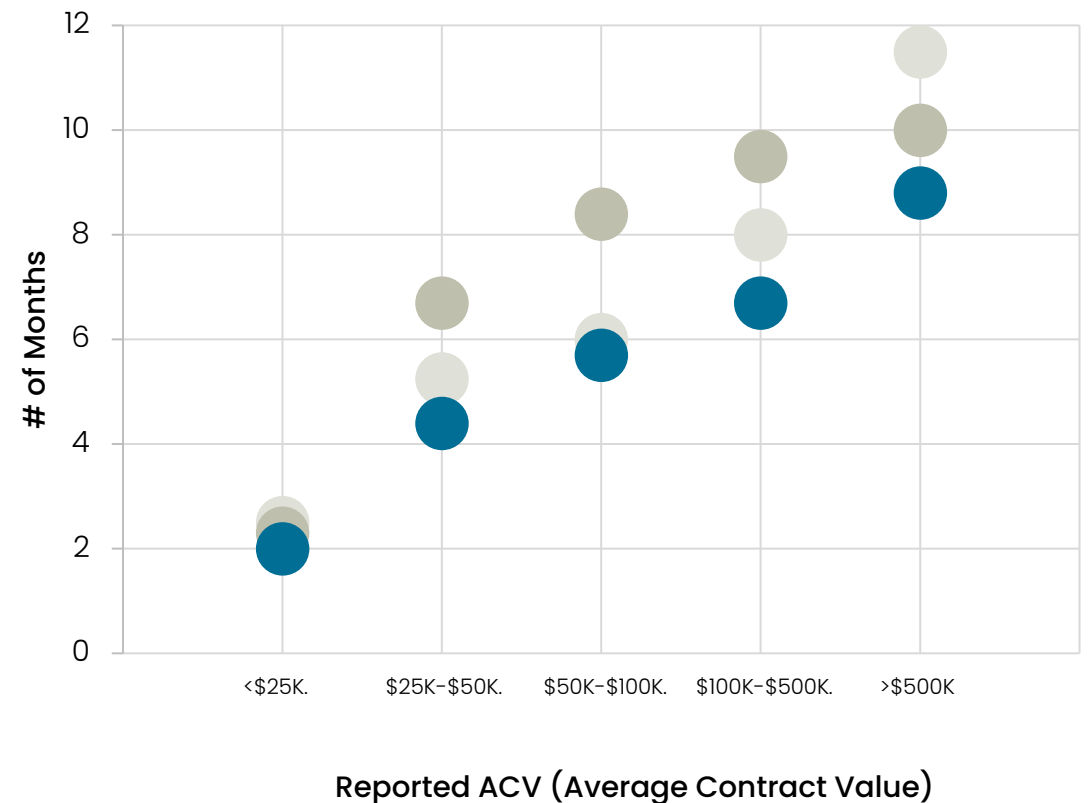
This suggests less resilience to delays in the current market, with deal slippage putting great pressure on organizations.



To support deal velocity, enable sellers with tools, messaging and customer insights that help tie solutions to urgent, strategic priorities.

What is your company's average sales cycle length? *Breakdown by Average Contract Value*

● 2023 ● 2024 ● 2025



Product Marketing remains top hiring priority, while *Marketing Operations* sees biggest growth

Product Marketing continues to be a top hiring priority, with 42% planning to add roles in 2026, up from 37%.

Marketing Operations has risen sharply from one of the lowest hiring priorities to a top four hiring priority.

Digital marketing was a greater priority for large companies (73% of those over \$100M vs. 24% of those under \$100M).

The roles in lowest demand for the next 12 months include SDRs/BDRs (14%) and Marketing Analytics (13%) and Marketing Leaders (12%), not shown.

Our take:

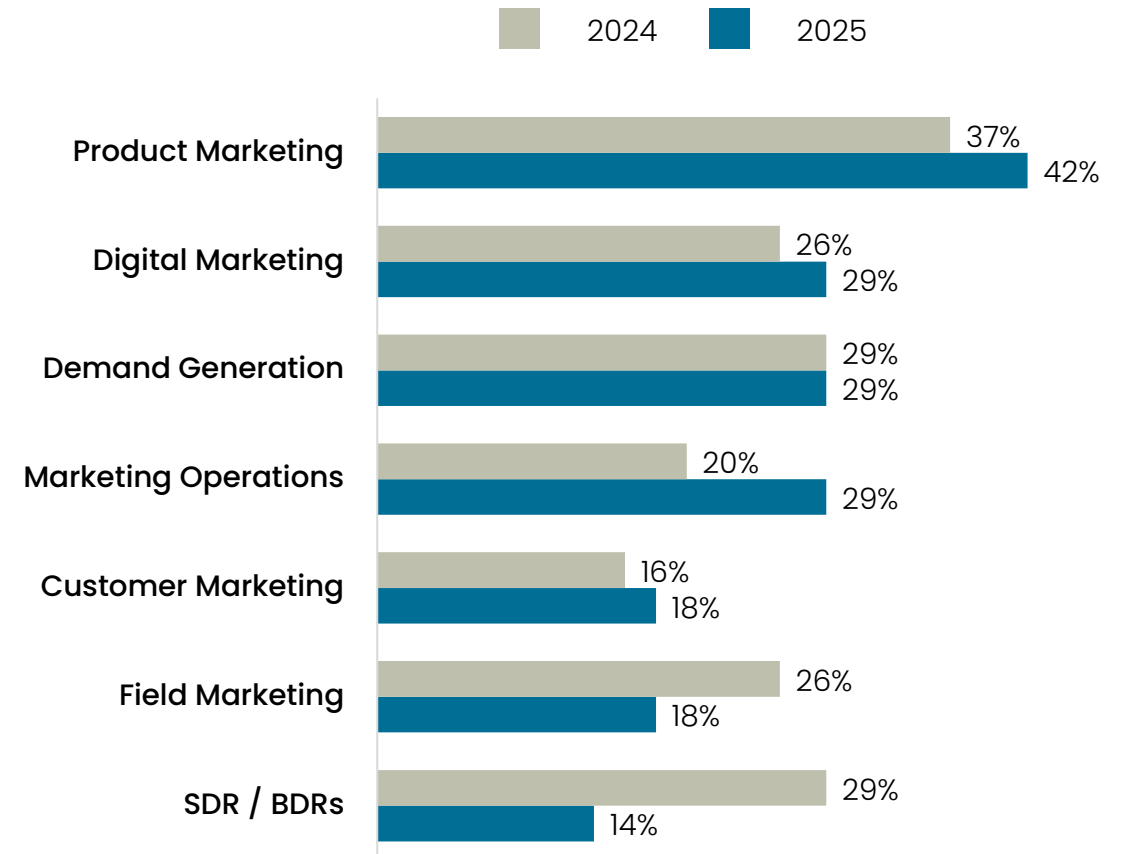
The surge in Marketing Operations roles is a likely response to the growing need to integrate AI, automation and data-driven decision making into marketing workflows.

Similarly, larger organizations are more likely to be hiring digital marketing talent, indicating deeper investment in technology-enabled marketing capabilities. Yet, Product Marketing's continued dominance shows that operational sophistication in this era is not enough. Companies still recognize the critical importance of differentiating their solutions, shaping clear, compelling positioning, and enabling sales and marketing with narratives and tools for success.

At the same time, the decline in Field Marketing and SDR/BDR hiring suggests a shift toward more efficient, AI- and technology-enabled engagement that reduce reliance on labor-intensive outreach.

What marketing roles are you planning to hire in the next 12 months?

Showing top 2024 and 2025 responses only



Renewals Shifting Away from Customer Success *Toward* *Sales Ownership*

In 2023, Customer Success was the primary owner of renewals (56%) though this has significantly declined YoY to 29% in 2025.

Conversely, ownership of renewals by Account Executives / Sales Teams has risen each year, from 33% in 2023 to 54% in 2025.

Dedicated Renewals Teams remain a stable presence however are only used by organizations above \$5M in revenue. No companies under this threshold indicated having a Dedicated Renewals Team vs. 17% of larger organizations.

Our take:

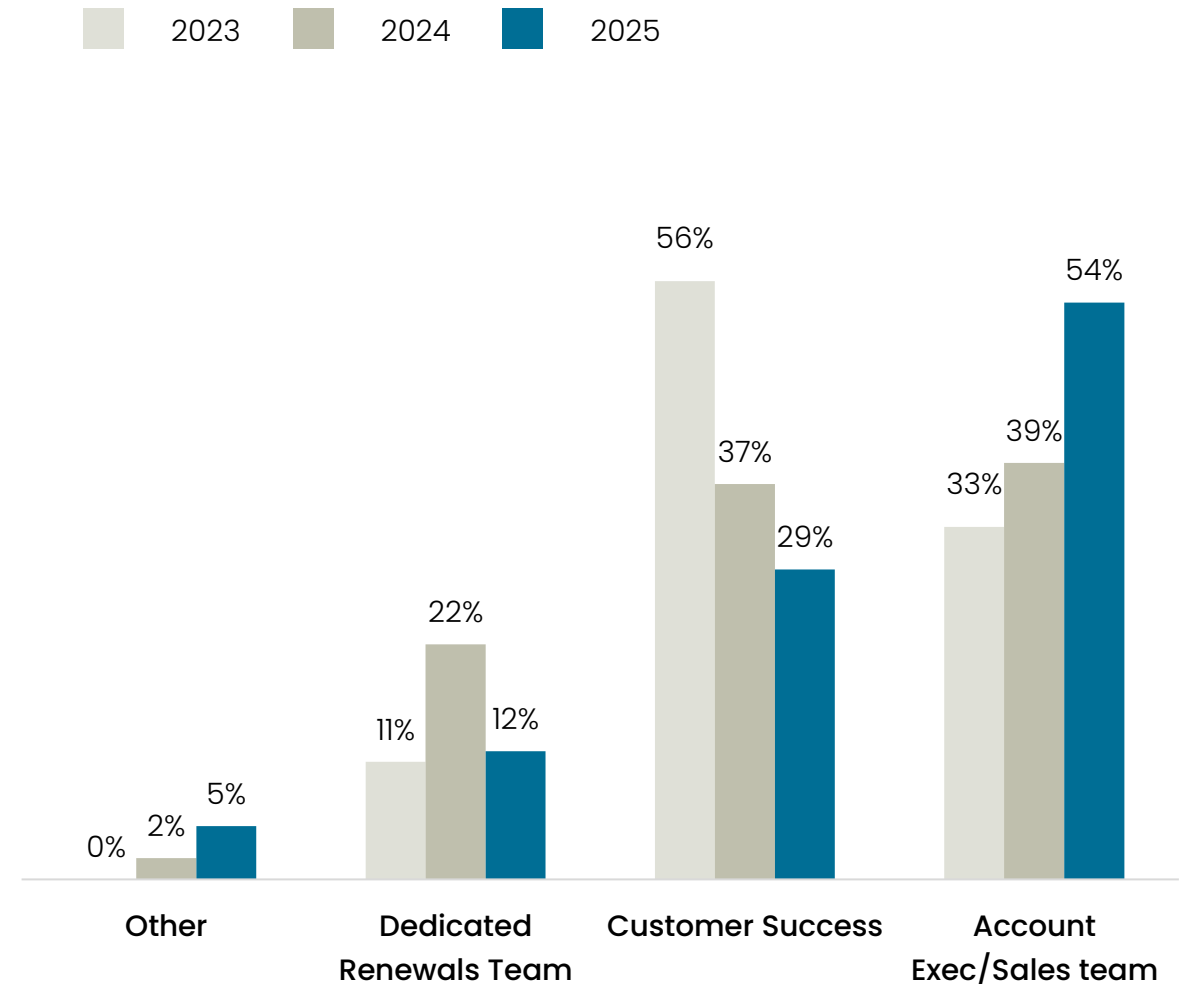
The shift in renewal responsibility from Customer Success to Sales signals that renewals are increasingly seen as part of the sales motion rather than solely a relationship management function. As orgs grow, they may also implement a Dedicated Renewals Team.

This shift is also about realigning skills with business objectives. Customer satisfaction and renewals require different skill sets.

Organizations now appear to be rebalancing responsibilities, moving renewals to Sales Teams or dedicated teams that are better equipped to drive account growth, upsell/cross-sell, and revenue outcomes, while enabling Customer Success to focus on strengthening satisfaction, adoption, and long-term retention.

Organizations should ensure that while roles are realigned, customer experience remains top-of-mind to sustain lasting relationships.

Who is responsible for renewals?



Continuing Shift Away From Scoring Models *Toward High-Intent MQL Definitions*



The use of scoring models to define MQLs has dropped significantly (55% in 2023 to 25% in 2025).

At the same time, reliance on high-intent signals (e.g., a demo or sales request) is growing (19% in 2023 to 30% in 2025).

A new definition was introduced in 2025 (“A lead who engages with our brand and matches our target persona”) to capture the growing emphasis of fit alongside engagement. This was selected by almost a quarter of respondents.

Our take:

Organizations are tightening their MQL definitions, moving from sophisticated, score-based criteria toward simplified, sales-aligned indicators of buying intent.

Which statements below best describes how your organization defines a Marketing Qualified Lead (MQL)?



The distinction between “any lead” and “a lead who engages and matches the ICP/target persona” underscores that combining fit and intent is critical to distinguish viable buyers from casual content engagers. In many cases, however organizations are finding that a simpler qualification approach can accomplish this without relying on the more complex scoring models that weigh multiple demographic and behavioral factors.

As MQL definitions evolve toward intent and fit without unnecessary complexity, marketing and sales alignment becomes even more critical. Standardizing on clear, sales-ready criteria will reduce friction in handoffs, improve conversion rates, and focus resources on leads most likely to drive revenue.

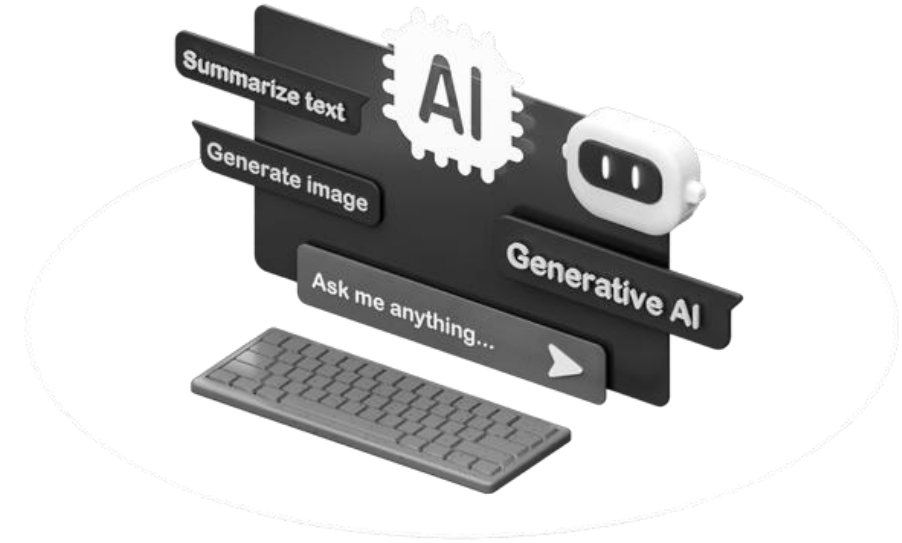


AI Adoption Maturity **Marketing vs. Sales**

Marketing ahead: Only 1% are not exploring AI, while 40% are already at 3+ use cases or integrated adoption.

Sales is lagging, with 4% not exploring and 74% still in research, pilots, or 1–2 use cases.

There is a scale gap. Marketing has 27% integrated use cases across teams vs. 11% in sales.



Our take:

AI is nearly universal, but maturity diverges sharply.

Marketing is further along in scaling pilots into enterprise-wide adoption, while sales remains concentrated in early use.



This signals Marketing Leaders are treating AI as a core operating model shift, whereas Sales Leaders are experimenting tactically. Closing this maturity gap will require stronger governance and clearer ownership in sales.

Across all stages marketing leaders are feeling the pressure to reduce costs and drive more efficient growth (see: [Marketing Budgets](#)). AI adoption may be more of necessity for teams being challenged to "do more with less."

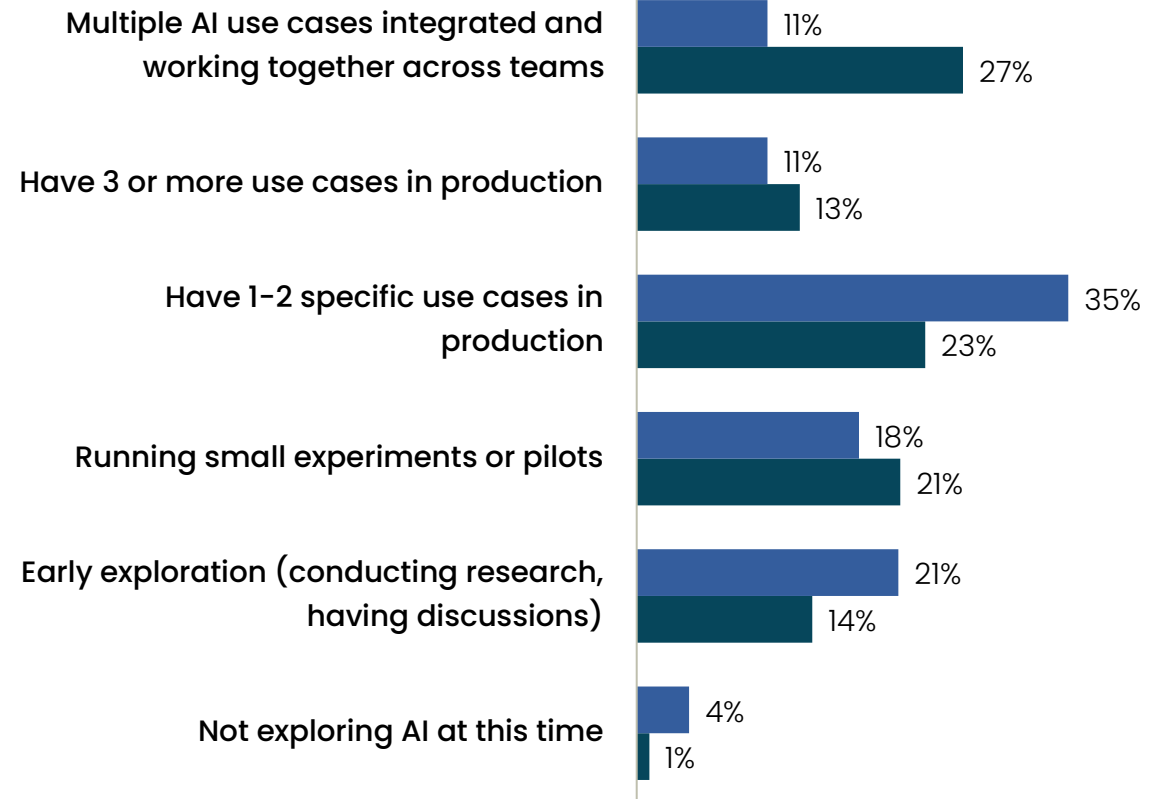
Where is your organization today in its adoption of AI for use cases?



Sales



Marketing



Firms that Increased their Revenue Targets *Favor Customer-Centric Sales Coverage*

Industry/vertical sales coverage segmentation is twice as common among firms that raised targets (34% vs. 17%).

Customer size-based segmentation also correlates with target-raising firms (32% vs. 19%).

Companies that did not increase their targets relied more on geographic segmentation (30%).

Our take:

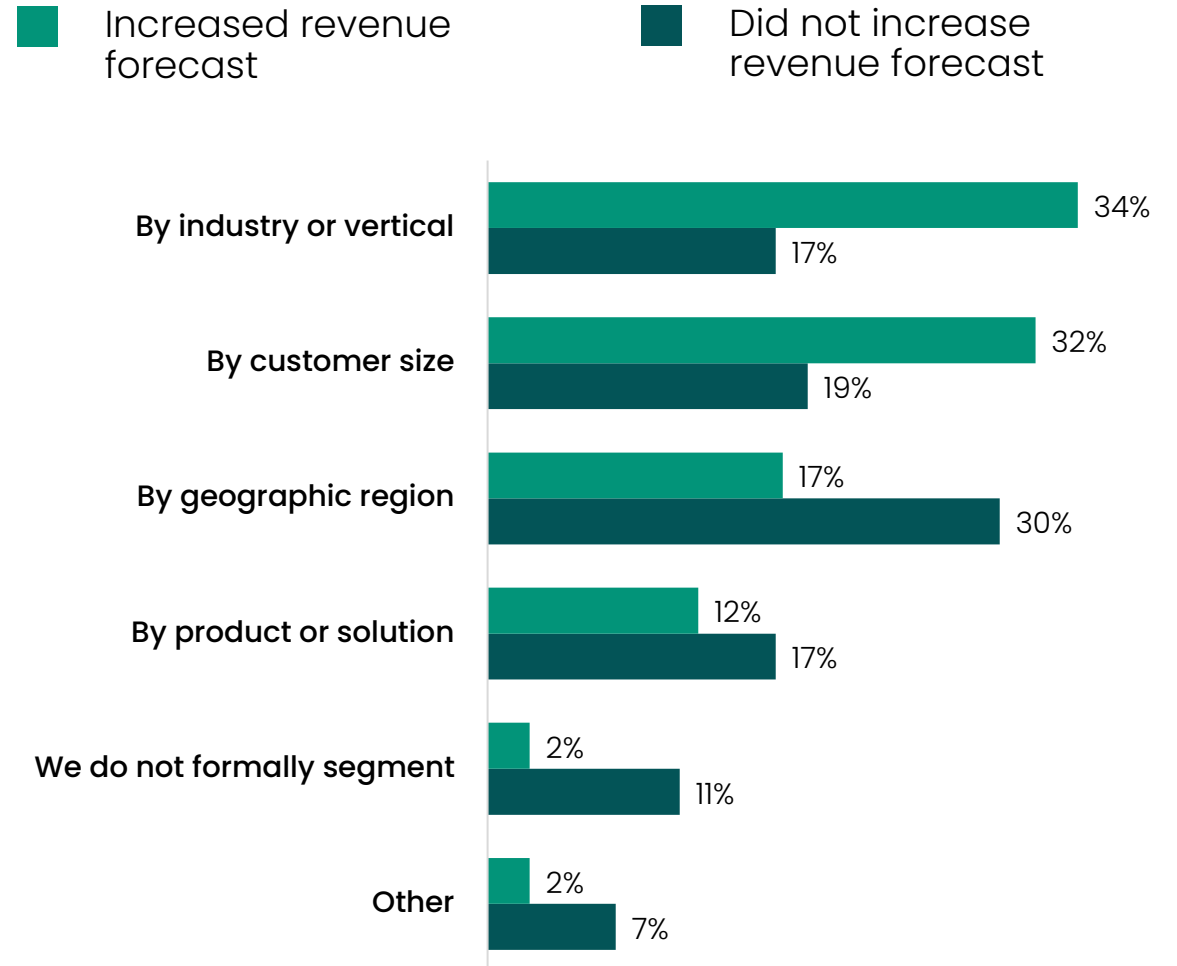
Companies that raised revenue targets were more likely to segment sales coverage around customer attributes, such as industry or customer size, rather than geographic boundaries.

This suggests that companies that experienced an increase in growth recognize the value of tailoring their approach to the unique needs and priorities of specific customer groups.

In contrast, organizations that decreased revenue targets or held them flat leaned more on geographic or ad hoc segmentation, organizing less directly based on customer needs.

In short, organizations that saw an increase in growth aligned coverage more directly to customer needs.

Primary method of assigning sales coverage based on material reforecasting done



Target-Raising Firms Show **Deeper AI Adoption**

71% of companies that raised revenue targets have at least one AI use case in production, compared to just 45% of firms that did not increase their targets.

Target-raising firms are also more likely to have 3+ use cases live (20% vs. 4%) and to be moving toward integrated adoption (15% vs. 8%).



Firms that did not raise targets cluster in early exploration or pilots (51% vs. 25%).

Our take:

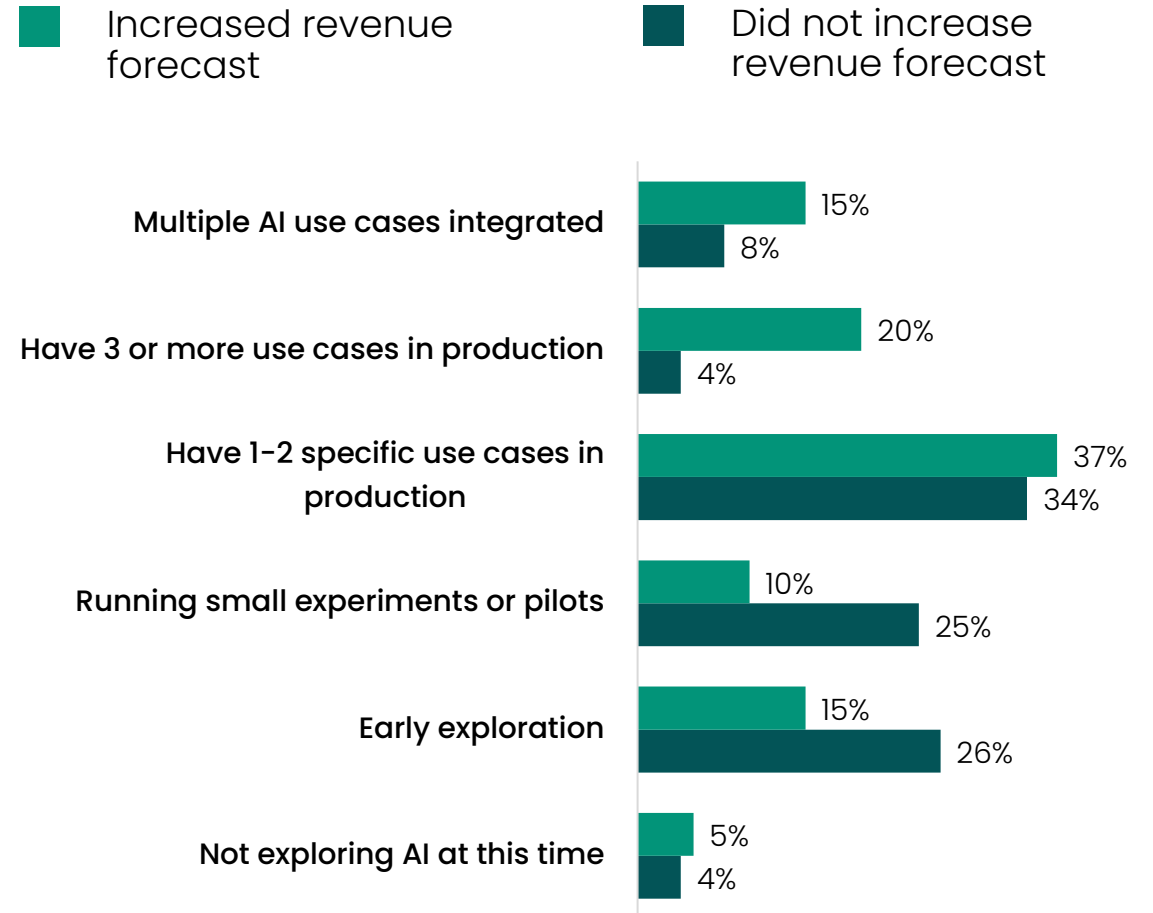
The data shows a correlation:

Organizations that raised revenue targets are further along in AI adoption.

They are more likely to have 3+ use cases or integrated adoption in production compared to their peers who are more often in early exploration or pilot stages. This suggests that organizations signaling growth ambitions may be the ones investing more heavily in AI, highlighting how AI adoption can help organizations move forward in achieving scale.



Where is your organization today in its adoption of AI for marketing or sales use cases?



High Marketing Contribution Aligns with Greater Use of Paid Channels

Companies sourcing 51–100% of opportunities from marketing are more likely to cite Paid Search (53% vs. 34%) and Paid Social (42% vs. 25%) as top channels.

Firms sourcing less than half of opportunities from marketing lean less on these paid channels.

Our take:

Paid digital channels stand out for marketing-sourced growth. Organizations that source more than half of their opportunities from marketing are more likely to cite paid social and paid search as top contributing channels.

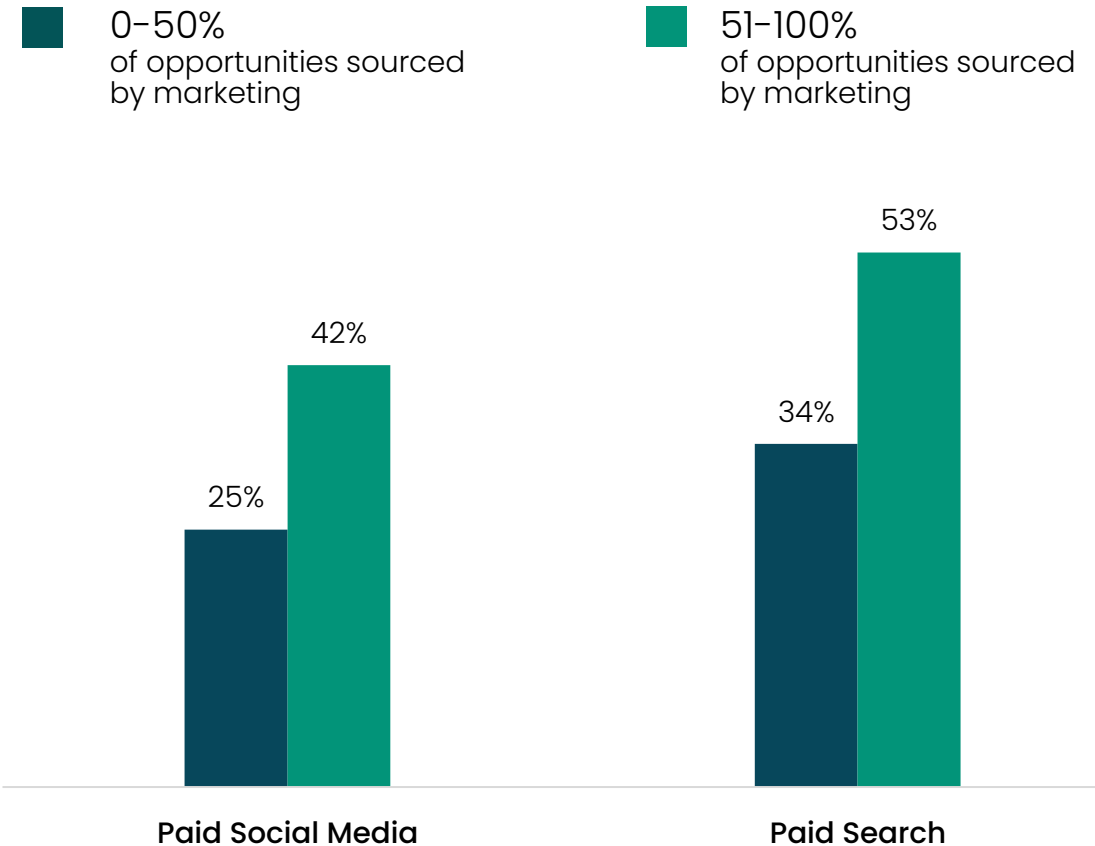
This indicates that paid digital channels play a larger role in opportunity generation when marketing is a primary driver of pipeline.

For Marketing Leaders, this highlights the importance of optimizing paid channels.

As marketing's contribution to pipeline grows, measurable digital tactics appear to become key to driving pipeline growth.

% of companies that selected Paid Social Media and Paid Search as top channels for opportunity creation

What % of opportunities are marketing sourced?



Higher AI Adoption Correlates with *Greater Marketing Contribution to Pipeline*

Organizations with greater AI adoption are more likely to have a higher share of opportunities sourced from marketing.

For instance, among those with multiple integrated AI use cases, nearly half report 51-100% of opportunities sourced by marketing, compared to just 20-29% among those in pilot or exploration stages.

Our take:

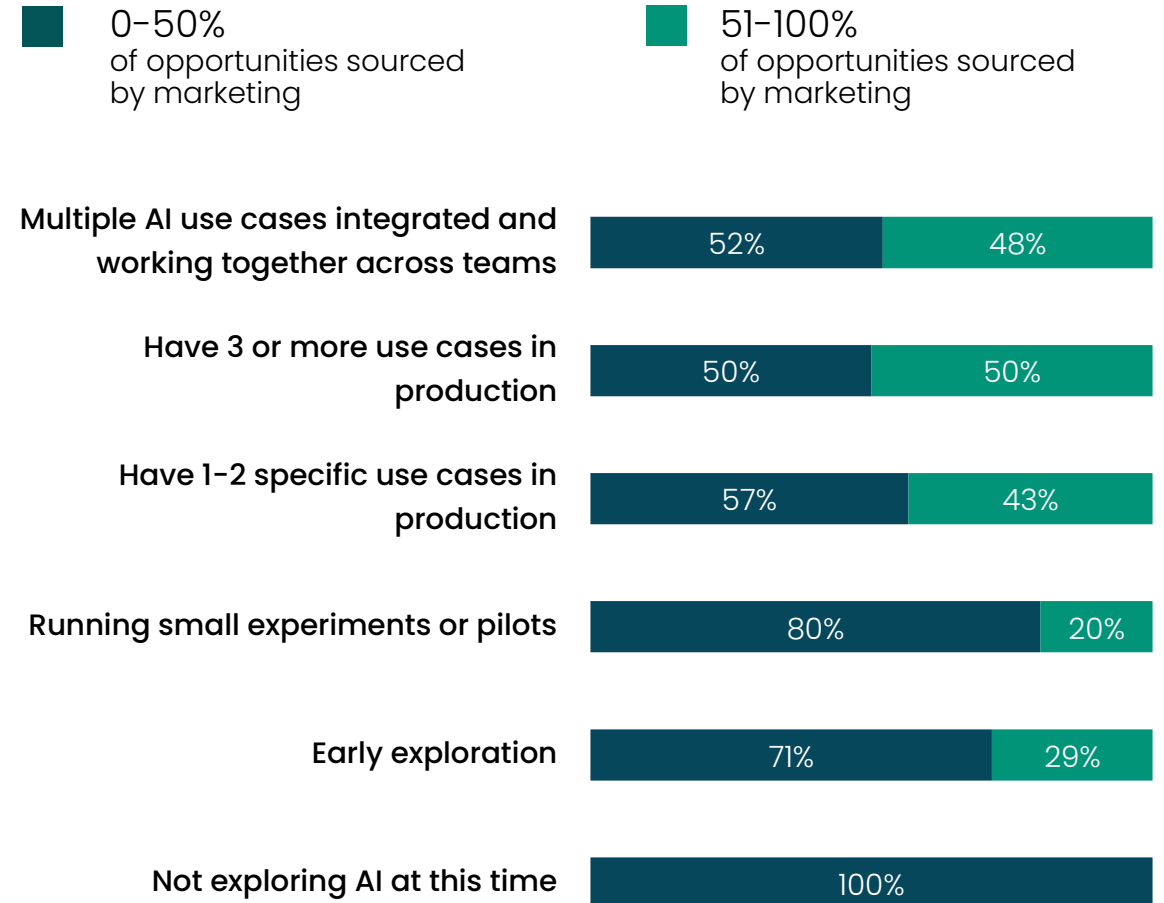
The relationship between AI maturity and marketing contribution highlights a meaningful connection. As organizations progress in their AI adoption, they may be sharpening targeting, personalization, and creative efficiency that strengthen marketing impact. They may also be building the infrastructure and data discipline needed to elevate marketing's role in driving growth.

While the findings indicate a correlation, not a definitive causation, the takeaway remains:

AI progress and marketing impact tend to move in tandem

Investing in one likely supports advancement in the other. Looking ahead, AI will become an even greater factor in enabling teams to enhance marketing performance.

% of opportunities sourced by marketing, by level of AI adoption



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Team Structure & Headcount Benchmarks

2025 B2B Sales & Marketing
Benchmark Survey



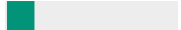


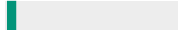
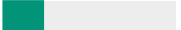
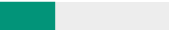
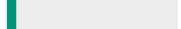
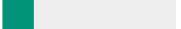
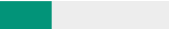
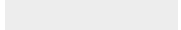
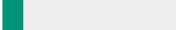
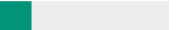
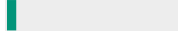
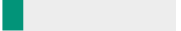
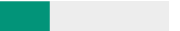
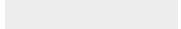
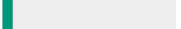
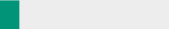
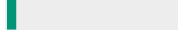
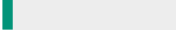
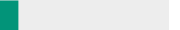
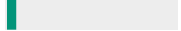
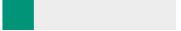
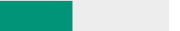
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Team
Structure
& Headcount
Benchmarks

Sales
Organization



Sales team roles by company revenue

Function	Early Stage (<\$15M rev)	Mid-Market (\$16M-\$100M)	Upper Mid-Market (>\$100M rev)
Account Execs	3 	8 	22 
Sales Engineers	1 	4 	8 
Sales VPs	1 	3 	7 
Sales Enablement	0 	2 	5 
Rev. Operations	1 	2 	7 
Deal Desk	0 	1 	3 
SDR/BDR Directors	1 	1 	3 
SDRs/BDRs	1 	3 	10 



Account Executives:

The increase in Account Executives underscores how growth scales primarily through quota-carrying reps.

Specialist Roles:

Functions like Sales Enablement, Revenue Operations, and Deal Desk emerge as companies scale, becoming a more meaningful share of roles.

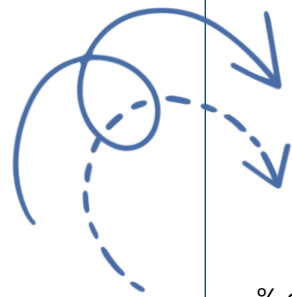
Leadership:

VP roles expand modestly with scale.

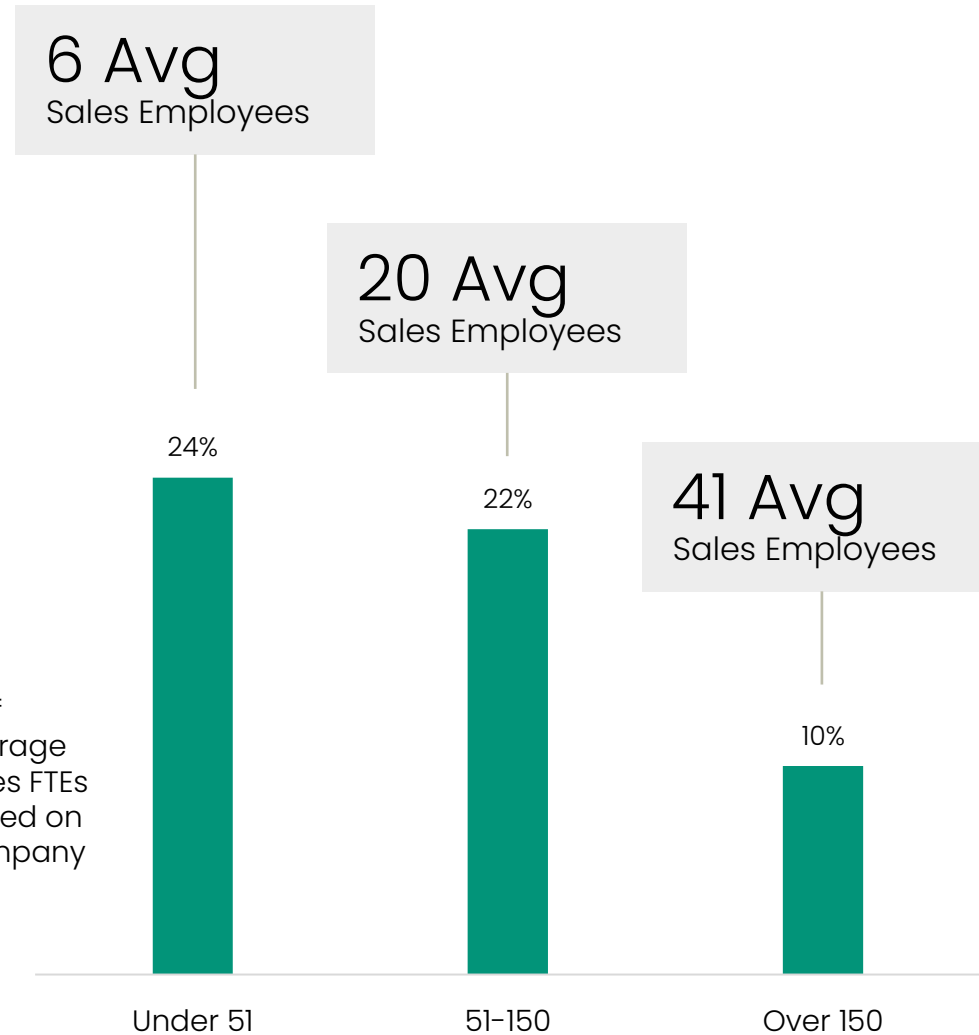
Average sales team size by total organization size

Q

Approximately how many people work at your company?



% of Average Sales FTEs based on company size



Sales team headcount scales with company size:

Smaller firms (under 51) average just 7 sales people.

However, sales makes up a smaller share of the workforce as companies grow:

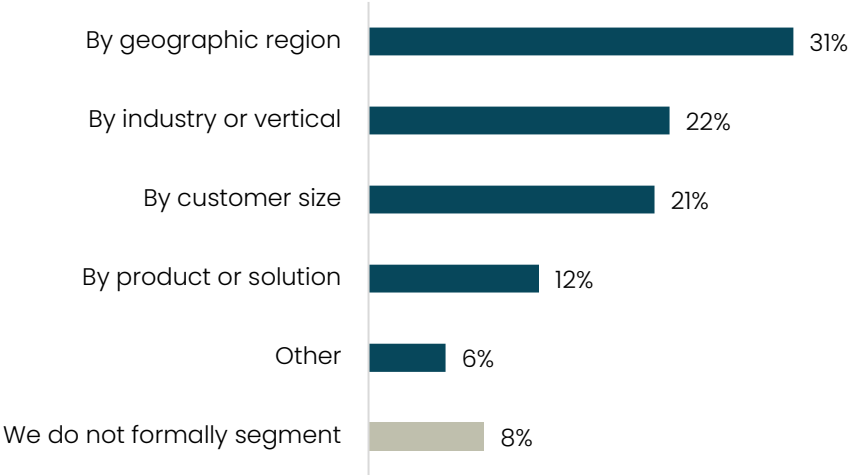
Sales makes up 24% of headcount in the smaller companies versus 10% in the larger companies.

How organizations assign sales coverage

Q

What is the primary way your organization assigns sales coverage or territories?

Across cohorts



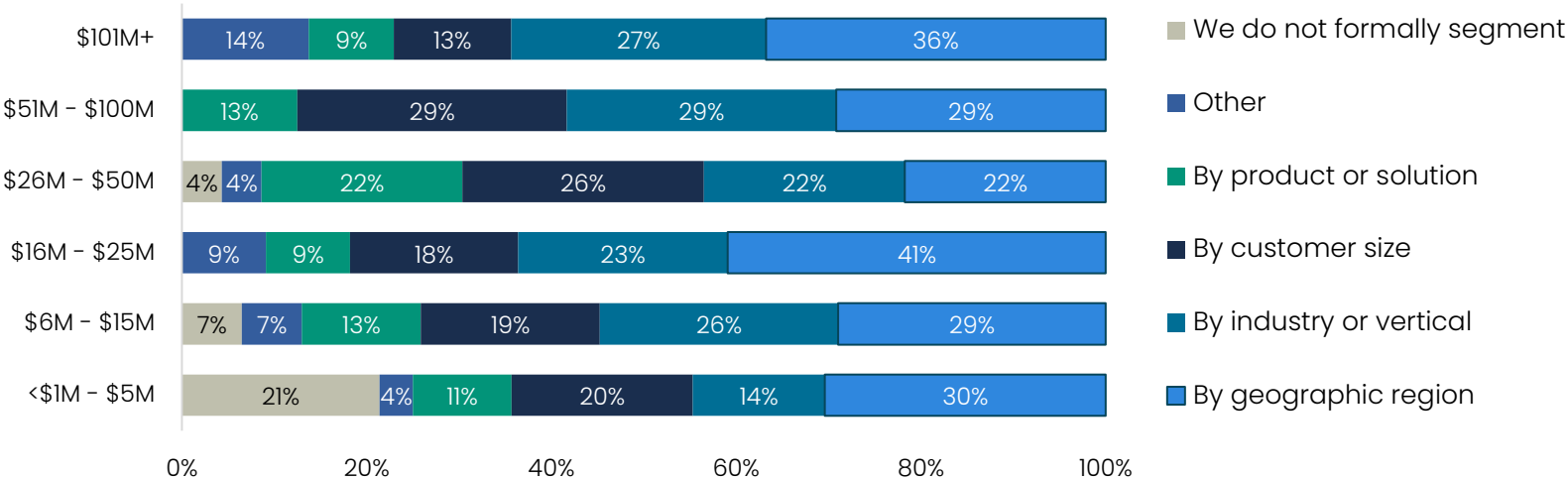
Geography is the universal anchor, used at every revenue stage.

Organizations \$51M–\$100M also lean equally on segmenting by customer attributes (customer industry and size).

Early-stage firms show gaps, with up to 21% lacking formal segmentation.

‘Other’ response examples include, round robin, named/target account lists, mix of geo and industry.

By revenue



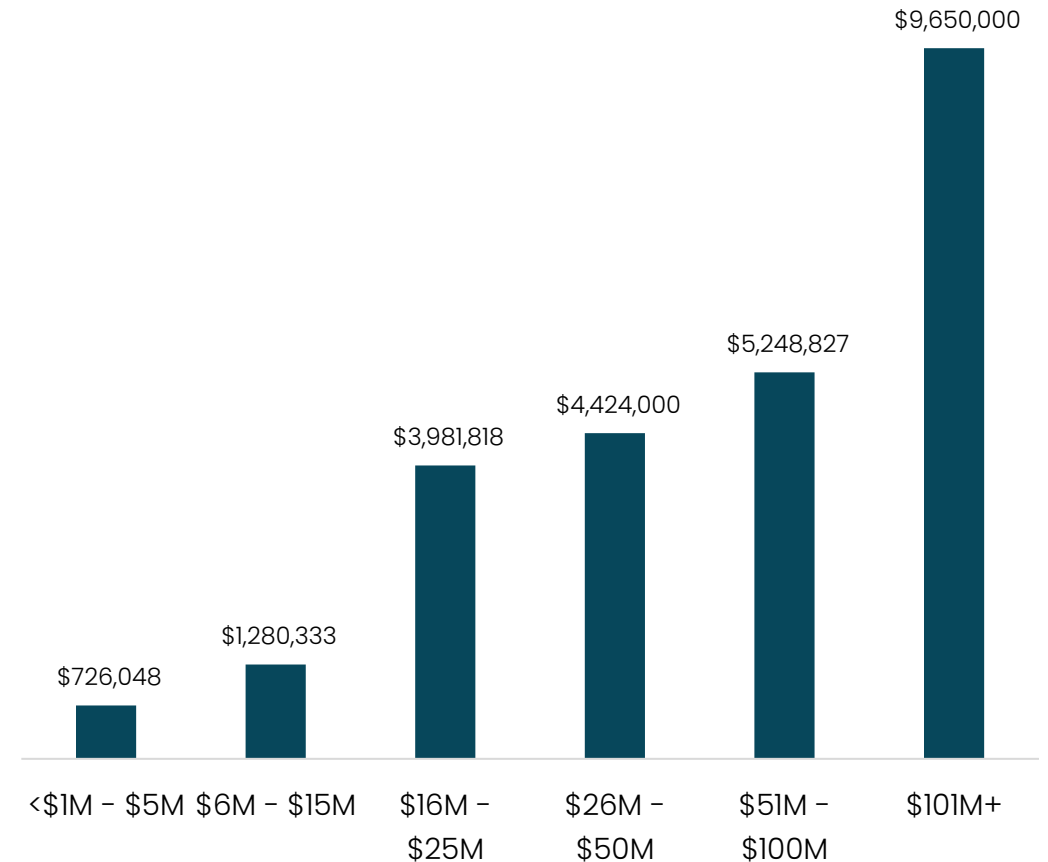
Average sales payroll and headcount expenses



Sales payroll and headcount expenses rise meaningfully with company revenue. Smaller firms (<\$15M) often spend under \$1.5M while the largest firms can exceed \$9M.

While absolute spend generally increases with revenue, when looking at individual companies, **sales investments are scaled differently** likely based on strategy, maturity and market conditions.

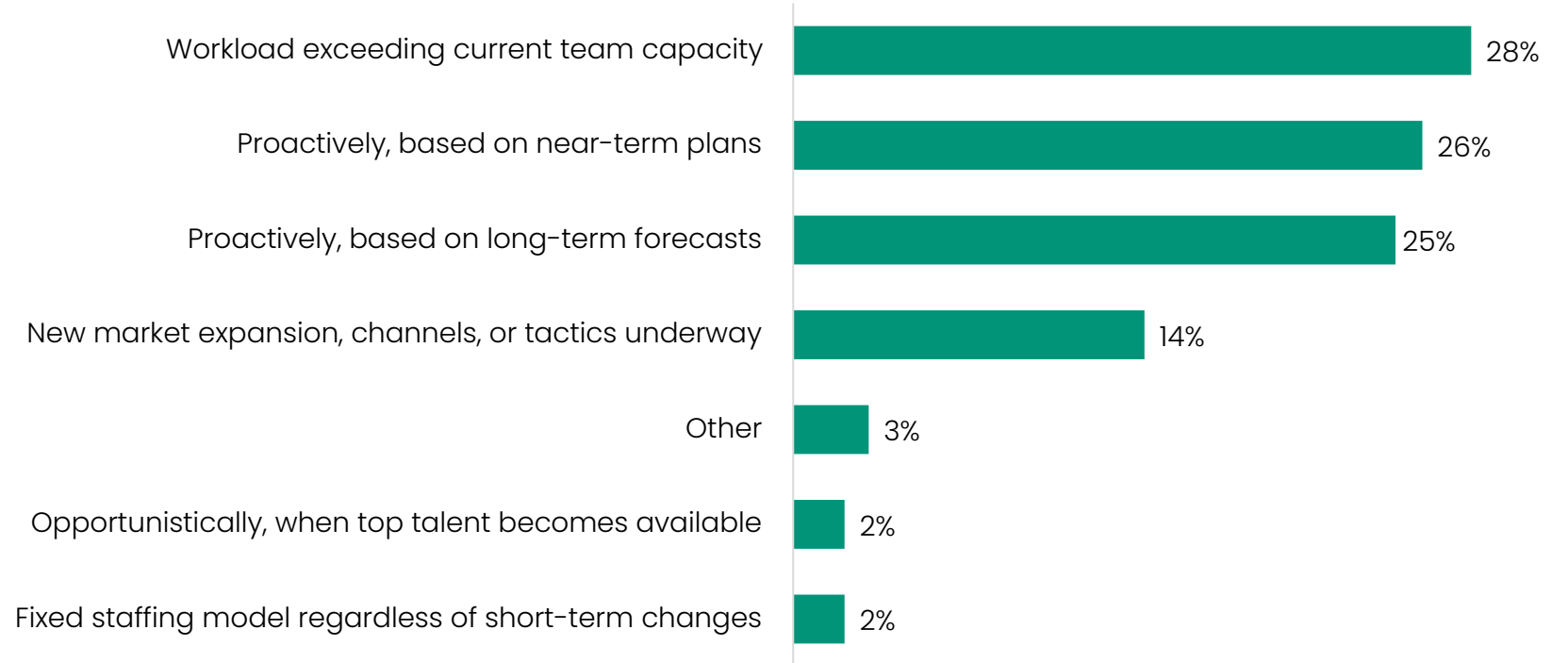
Average spend on sales payroll & headcount expenses by revenue size



Inflection points for adding headcount in sales

Q

At what inflection point does your organization typically add headcount in Sales?



Hiring is often responsive:

54% add reps after workload strain (28%) or based on short-term plans (26%).

Long-term planning is limited:

25% hire based on long-term forecasts.

Opportunistic hiring is rare:

Only 2% add headcount when top talent is available.

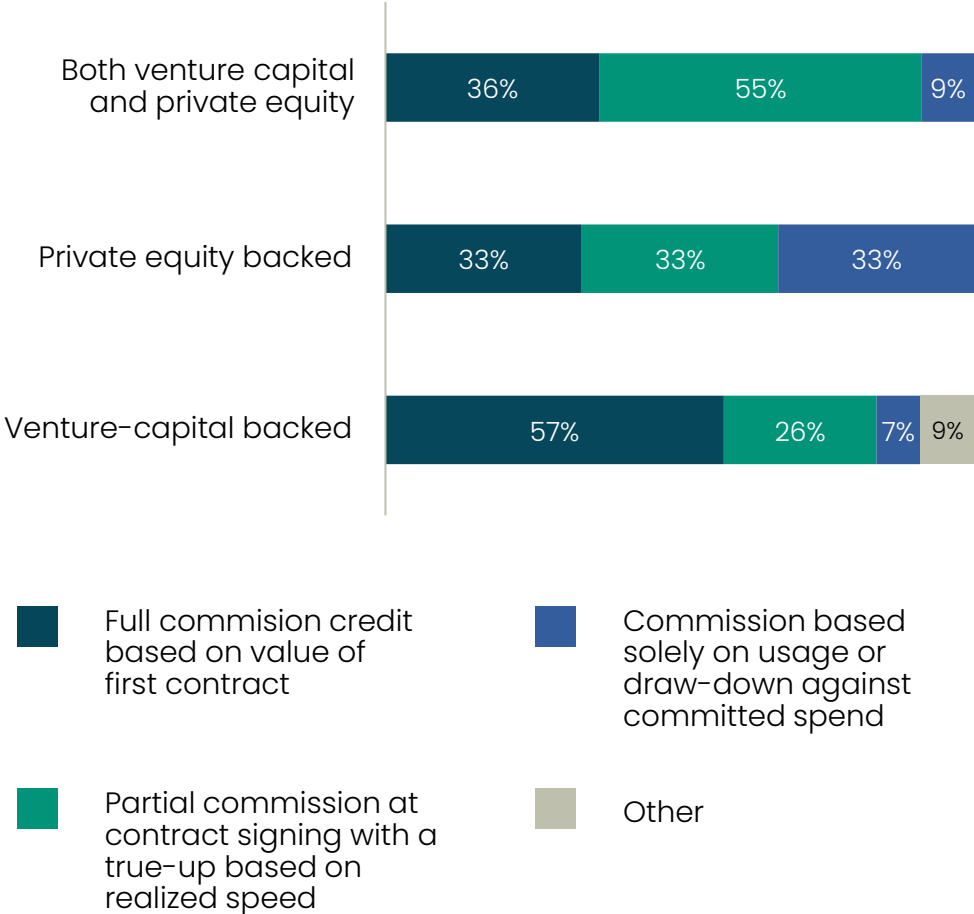
Leadership action:

Consider setting capacity thresholds and forecast triggers to prevent reactive staffing that risks quota attainment and coverage.

Sales compensation models



What is your primary compensation model?



- VC-backed:**
Skew to full upfront (57%), rarely using usage/draw-down.
- PE-backed:**
Spread evenly across upfront (33%), true-up (33%), and usage/draw-down (33%), a balanced mix rather than avoiding any model.
- Dual-backed:**
Lean on true-up (55%) to tie payouts to realized revenue.

VC-backed firms reward speed with heavy upfront credit, while PE and dual-backed emphasize alignment with actual revenue.

NORWEST

Team
Structure
& Headcount
Benchmarks

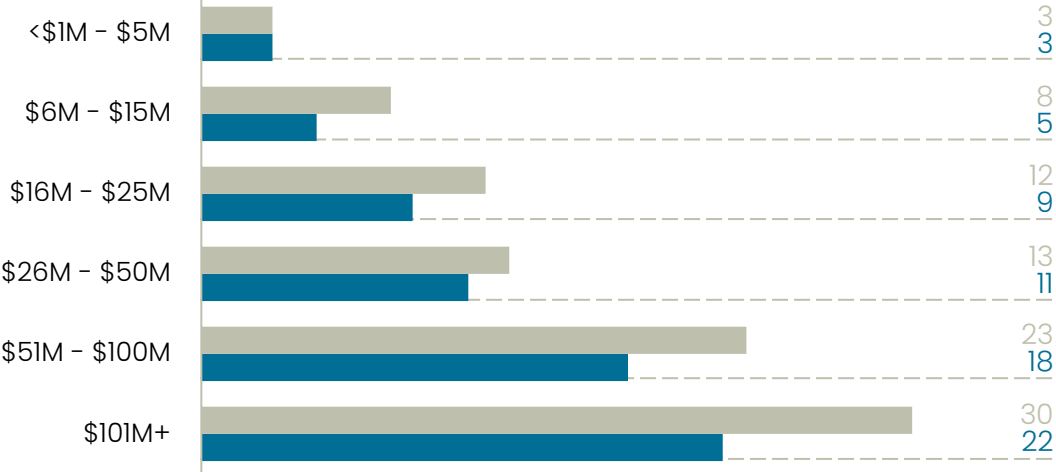
**Marketing
Organization**



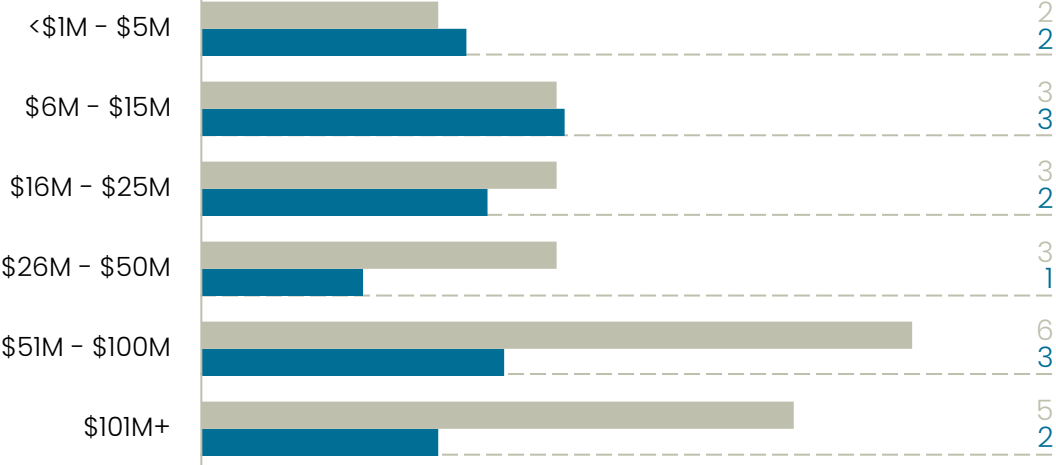
Average marketing team size

Q How many full-time employees do you have on your marketing team?*

Q How many part-time / contractors do you have in marketing?



2024 2025



Team size scales with revenue:

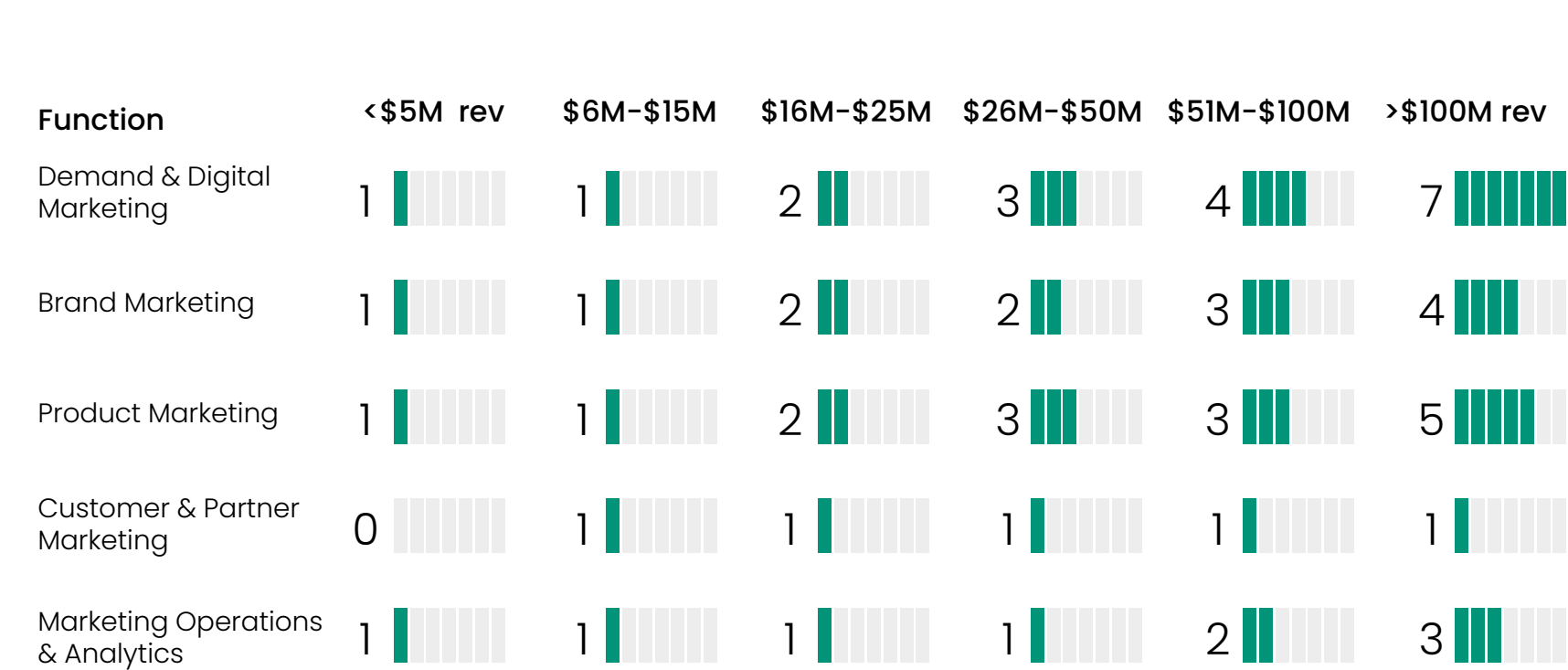
Larger organizations employ more full-time marketing employees, while smaller organizations are leaner and supplement with part-time employees or contractors.

Declining headcounts:

Organizations are showing declining FTE counts in 2025, suggesting leaner structures or efficiency pressures.

**Excludes agencies or very infrequently used contractors and SDR/BDR function*

Marketing team roles by company revenue



Headcount scales with growth:
Marketing headcount rises steadily with company revenue, reflecting expanding go-to-market complexity and investment in specialization.

Core roles dominate:
Demand & Digital Marketing and Product Marketing are typically the largest functions across cohorts, serving as a backbone for marketing. Brand is also a consistent part of team structure, growing steadily with revenue.

Operational sophistication emerges at scale:
As companies surpass \$50M in revenue, Marketing Operations & Analytics roles increase, signaling greater focus on data-driven performance management and efficiency.

Average marketing team size by total organization size

Q

Approximately how many people work at your company?



Marketing headcount scales with company size:

Smaller companies (under 51) average ~4 marketing employees.

However, marketing makes up a smaller share of the workforce as companies grow:

Marketing makes up 14% of headcount in the smaller companies versus 3% in the larger companies.

Marketing roles leaders are hiring heading into 2025

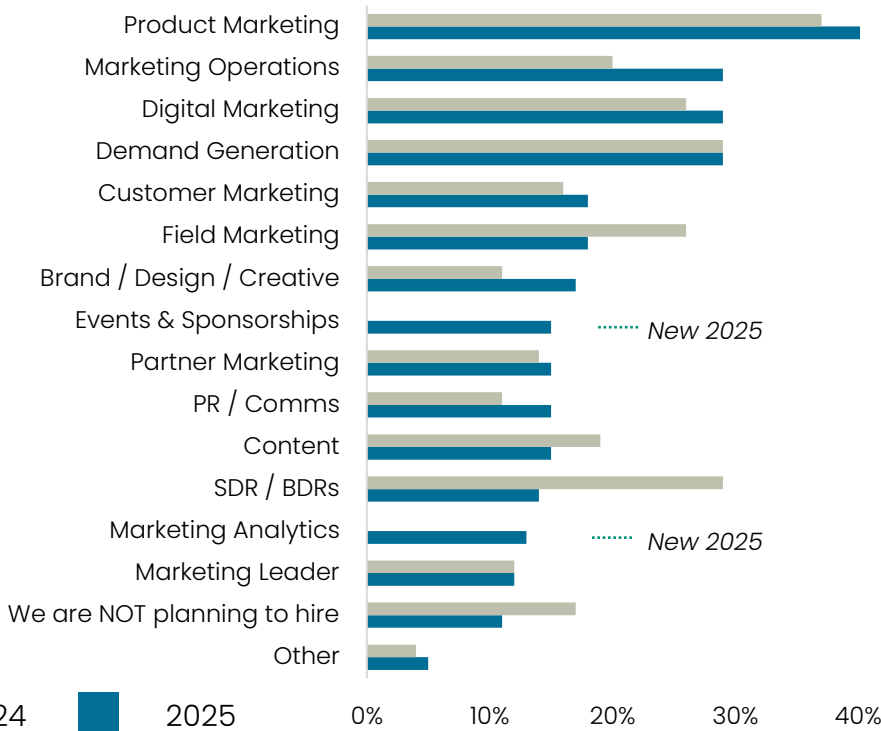
Q

What roles in your marketing team are you planning to hire in the next 12 months?

(Select all that apply)

Percentage of organizations hiring key roles, by employee count

# of employees	1-50	51-100	101-250	>250
Product Marketing	49%	38%	20%	42%
Marketing Operations	28%	19%	40%	32%
Digital Marketing	32%	10%	20%	47%
Customer Marketing	19%	14%	7%	26%
PR/Comms	21%	5%	13%	11%
Content	9%	19%	47%	0%



Product Marketing continues to lead hiring plans.

Marketing Operations has surged, likely due to the growing adoption of AI, automation and data in marketing.

Decline in Field Marketing and SDR/BDR hiring suggests a shift toward more efficient, AI/tech-enabled engagement, reducing reliance on labor-intensive outreach.

The increase in Brand/Design/Creative may suggest greater emphasis on generative engine optimization (GEO) and brand building.

Marketing technology stack ownership

Q

Who primarily owns and manages your marketing technology stack?

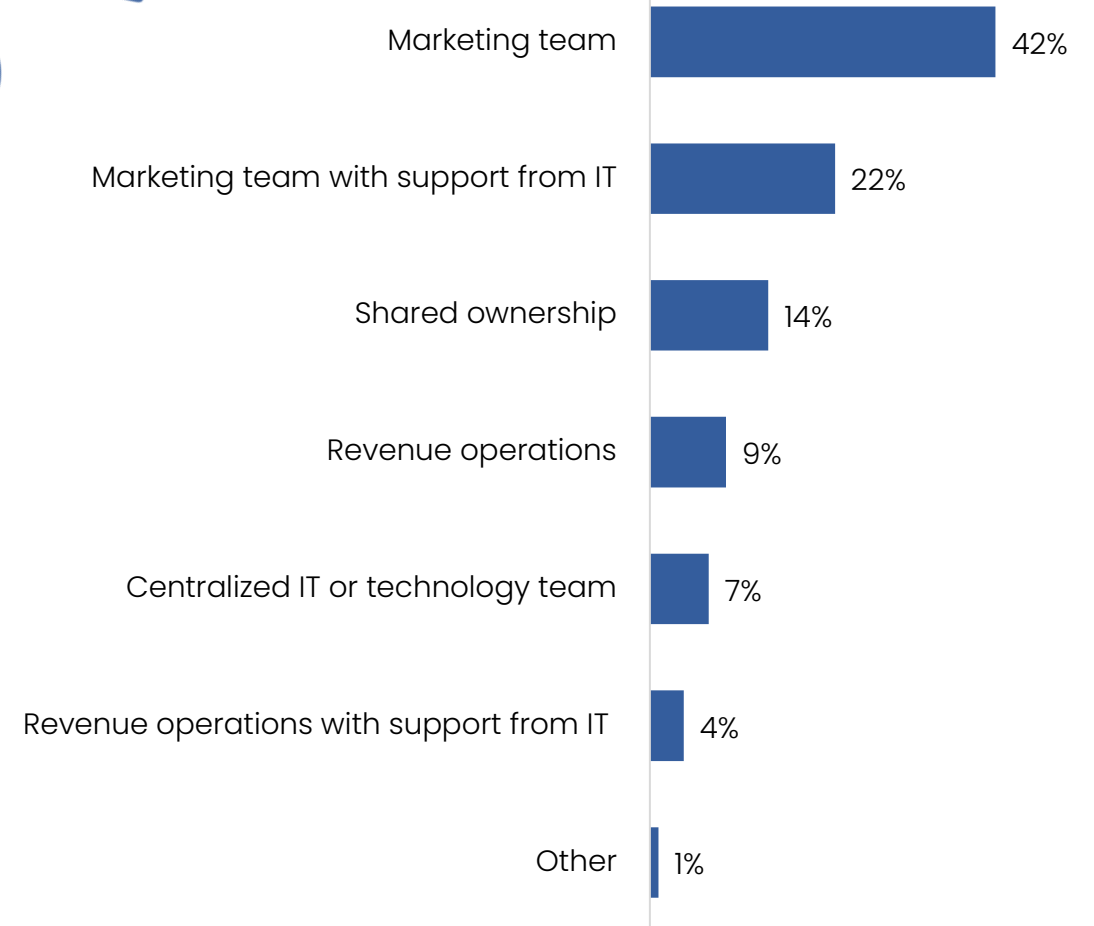
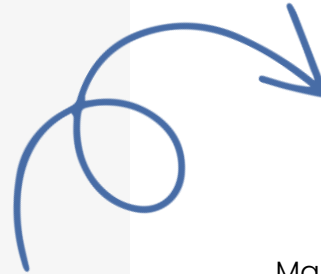


Marketing leads MarTech ownership:

Nearly two-thirds (64%) of stacks are owned by marketing (42% independently, 22% with IT support).

Autonomy is common:

42% of organizations give marketing full control over marketing technology decisions, making pure marketing ownership the most prevalent model.



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Budget & Investment Benchmarks

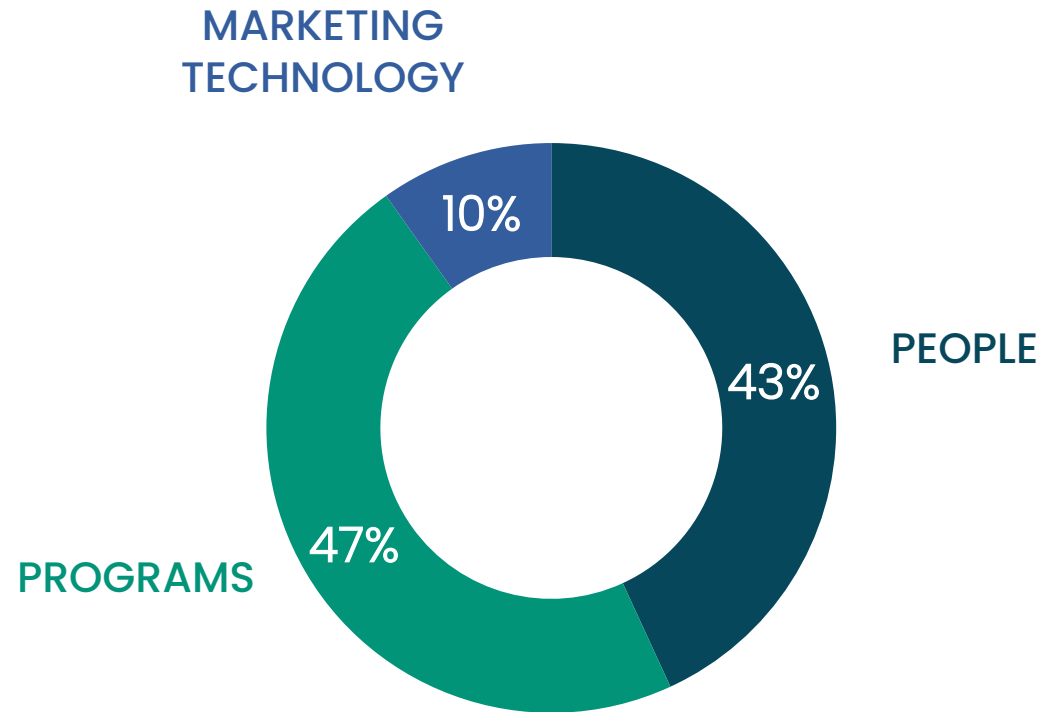
2025 B2B Sales & Marketing
Benchmark Survey



Marketing budget allocation: People, programs, tech



Of your marketing budget, approximately how much do you allocate to each of the following areas?



Budgets are split fairly evenly between programs (47%) and people (43%):

This reflects balanced investment in growth initiatives and the talent to execute them.

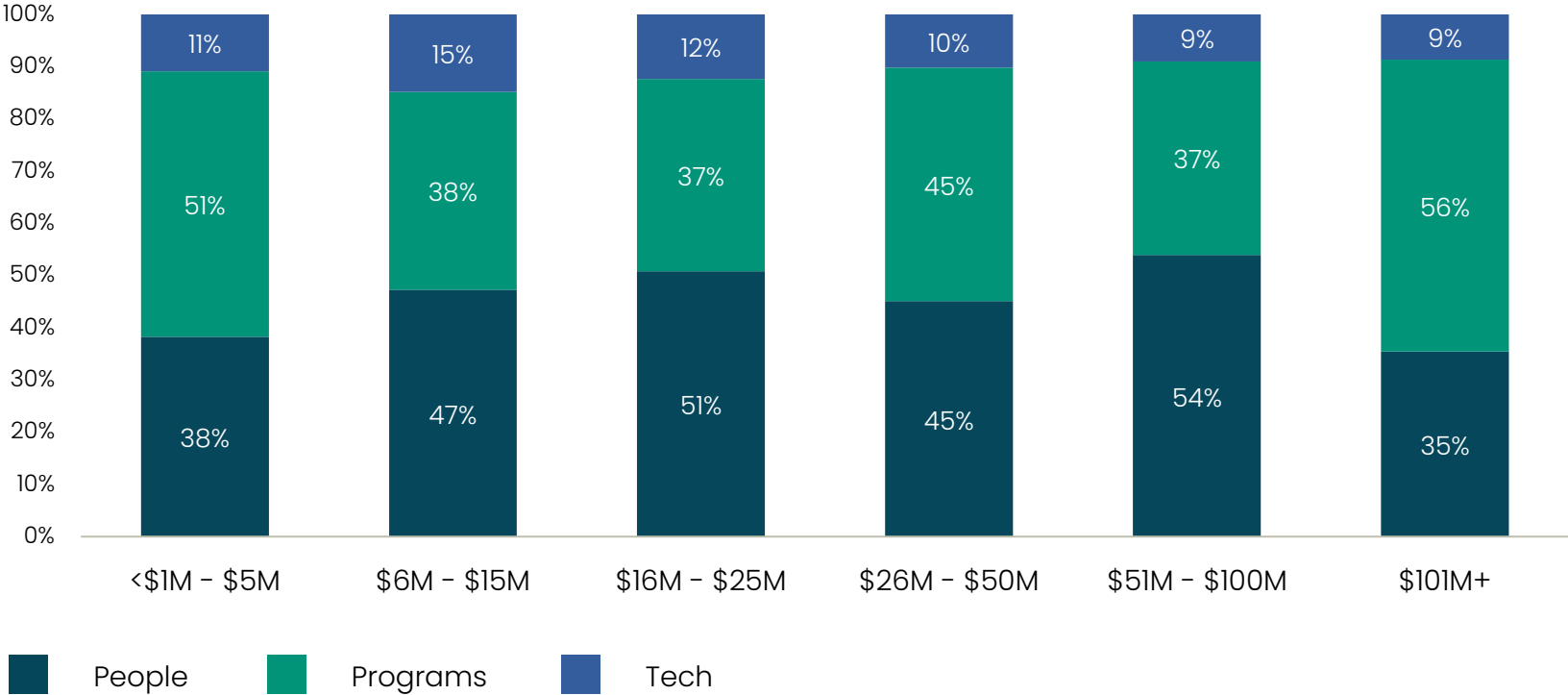
Tech is leaner:

10% of budgets tend to be allocated to MarTech, consistent with prioritization to limit overhead and maximize ROI.

Marketing budget allocation by organization revenue



Of your total marketing budget, approximately how much (in dollars) do you allocate to each of the following areas?



People & Programs:

People-driven investment peaks mid-scale while the largest organizations rebalance toward programs as efficiency gains set in.

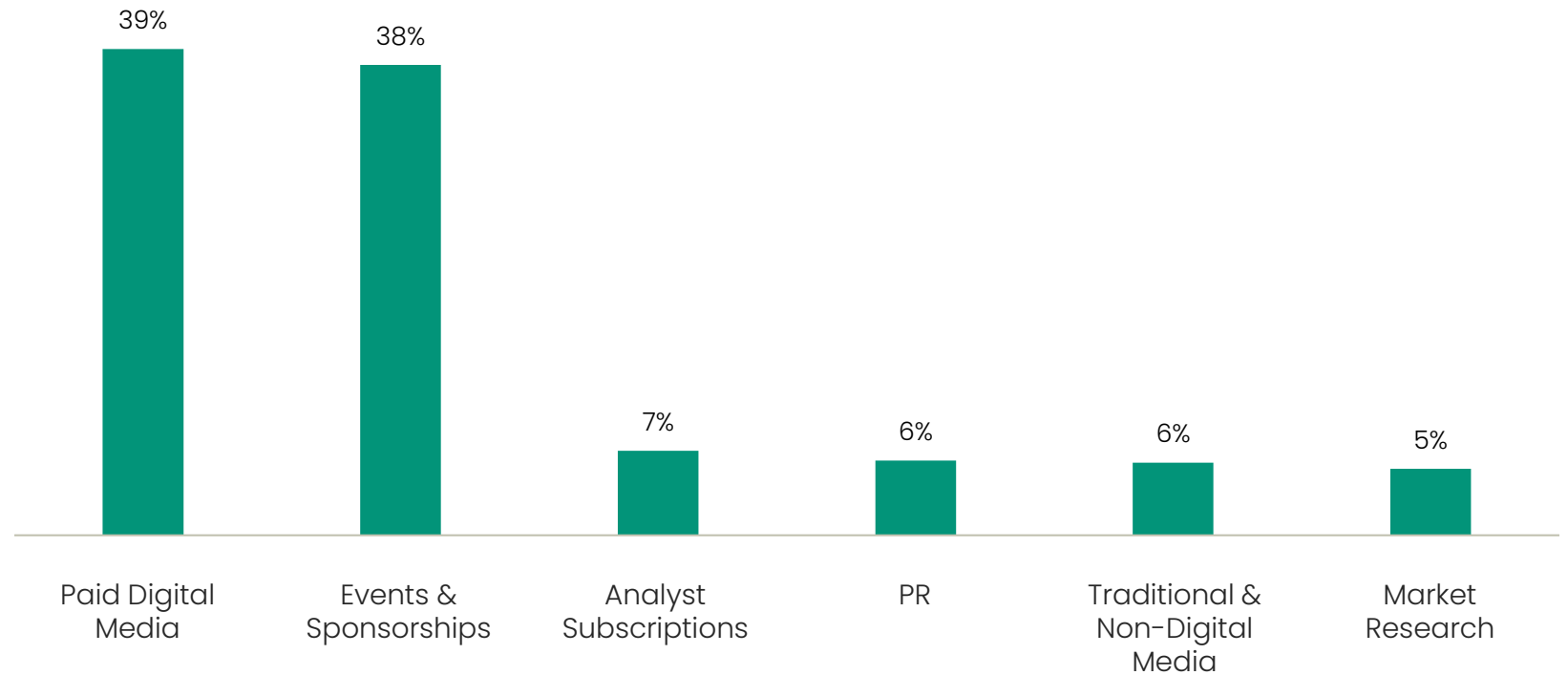
Tech:

Tech spend is a relatively small share of budget. It is proportionally higher for smaller companies, likely due to fixed, must-have platform costs, but becomes more efficient as organizations scale.

Marketing program investment breakdown



Share of annual marketing program spend for each of the following key program categories.



Program spend is concentrated:

Paid media (39%) and events/sponsorships (38%) dominate spend, together accounting for 77% of program budgets.

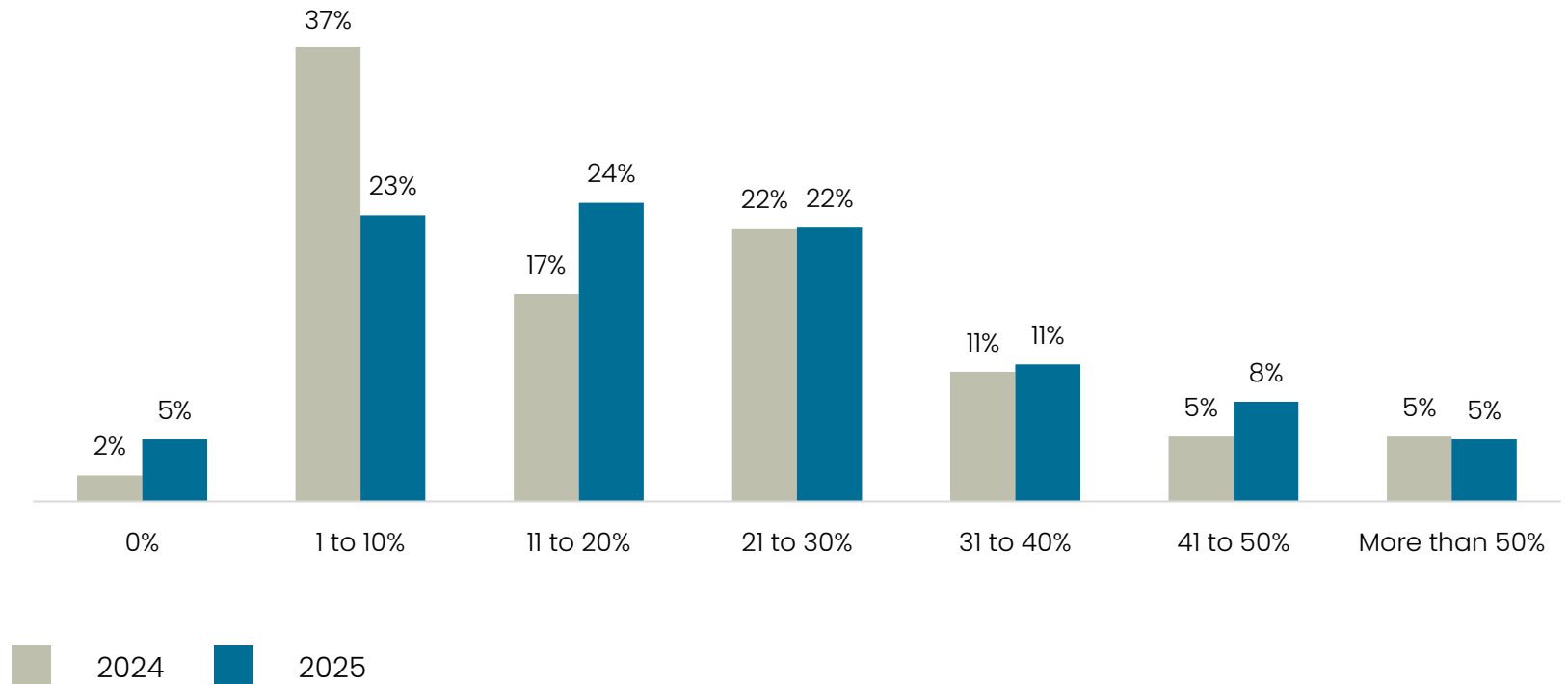
Digital & in-person balance:

The near-even split between paid digital and events points to a dual emphasis on scalable reach and high-touch engagement.

Brand awareness spend as a % of budget



What percentage of your marketing budget would you estimate is allocated to brand awareness activities?



Organizations tend to spend **up to 30%** of their budget on brand awareness activities.

Similar YoY pattern:

While there is a slight shift from 1-10% to 11-20%, brand awareness spend remains roughly in-line with last year.

Consistent across revenue tiers:

Limited statistically significant differences were observed by company size (not shown), indicating that brand awareness spend is more company-dependent.

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Sales & Marketing Performance Metrics

2025 B2B Sales & Marketing
Benchmark Survey



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Sales & Marketing Performance Metrics

Sales Performance

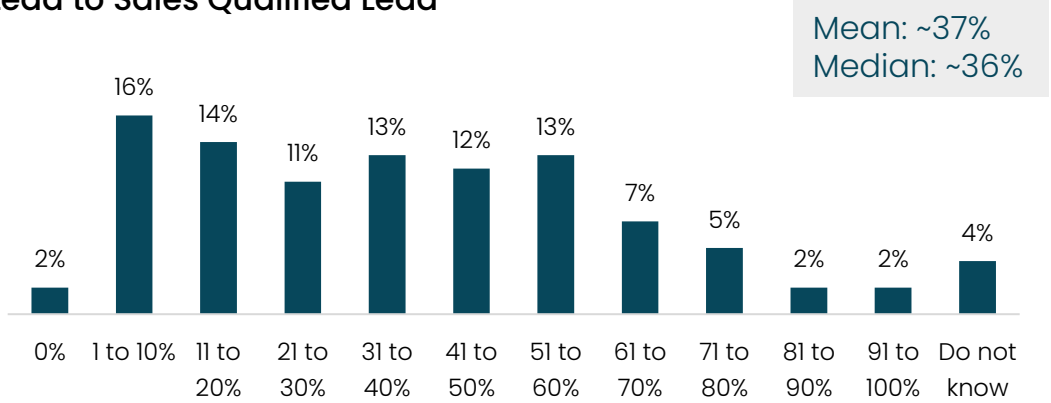


Sales funnel conversion rates by stage

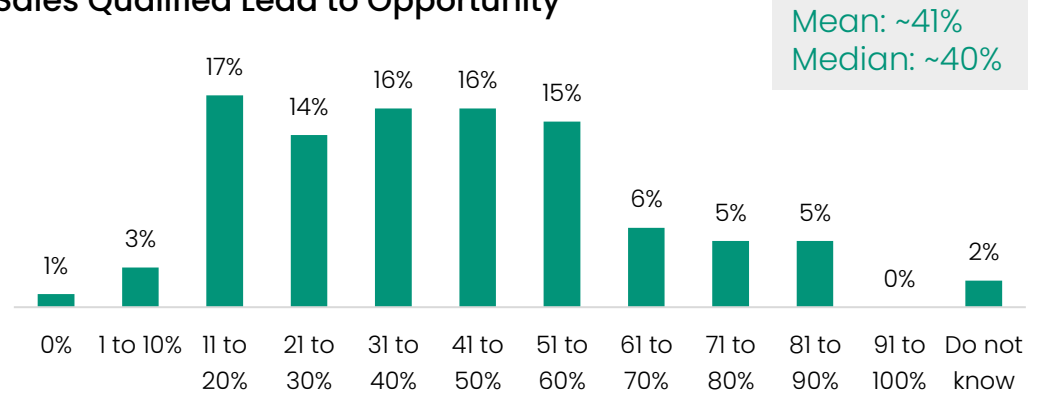


While conversion rates vary widely, they generally improve at later stages, reflecting a funnel where early qualification is toughest, but later-stage deals convert at higher rates.

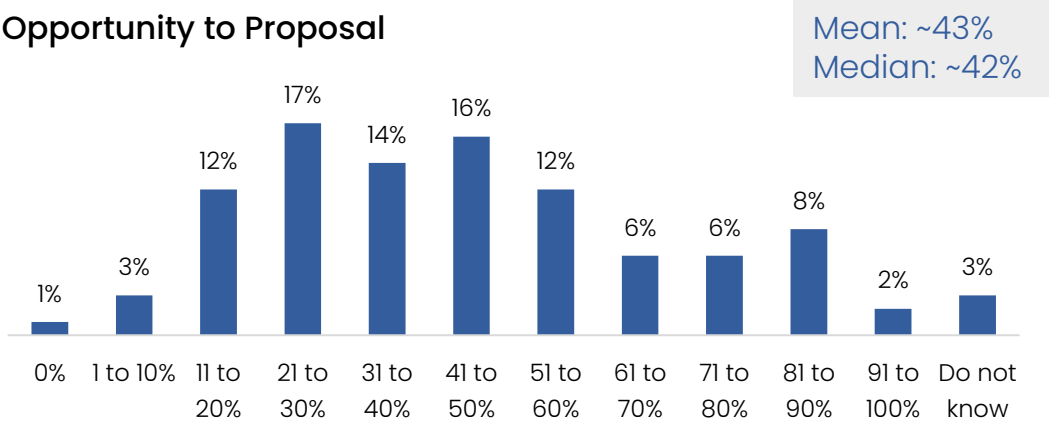
Lead to Sales Qualified Lead



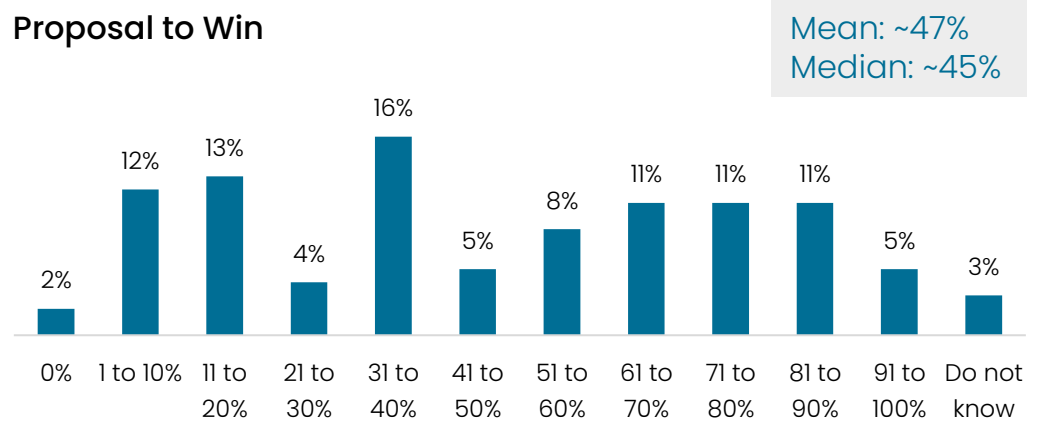
Sales Qualified Lead to Opportunity



Opportunity to Proposal



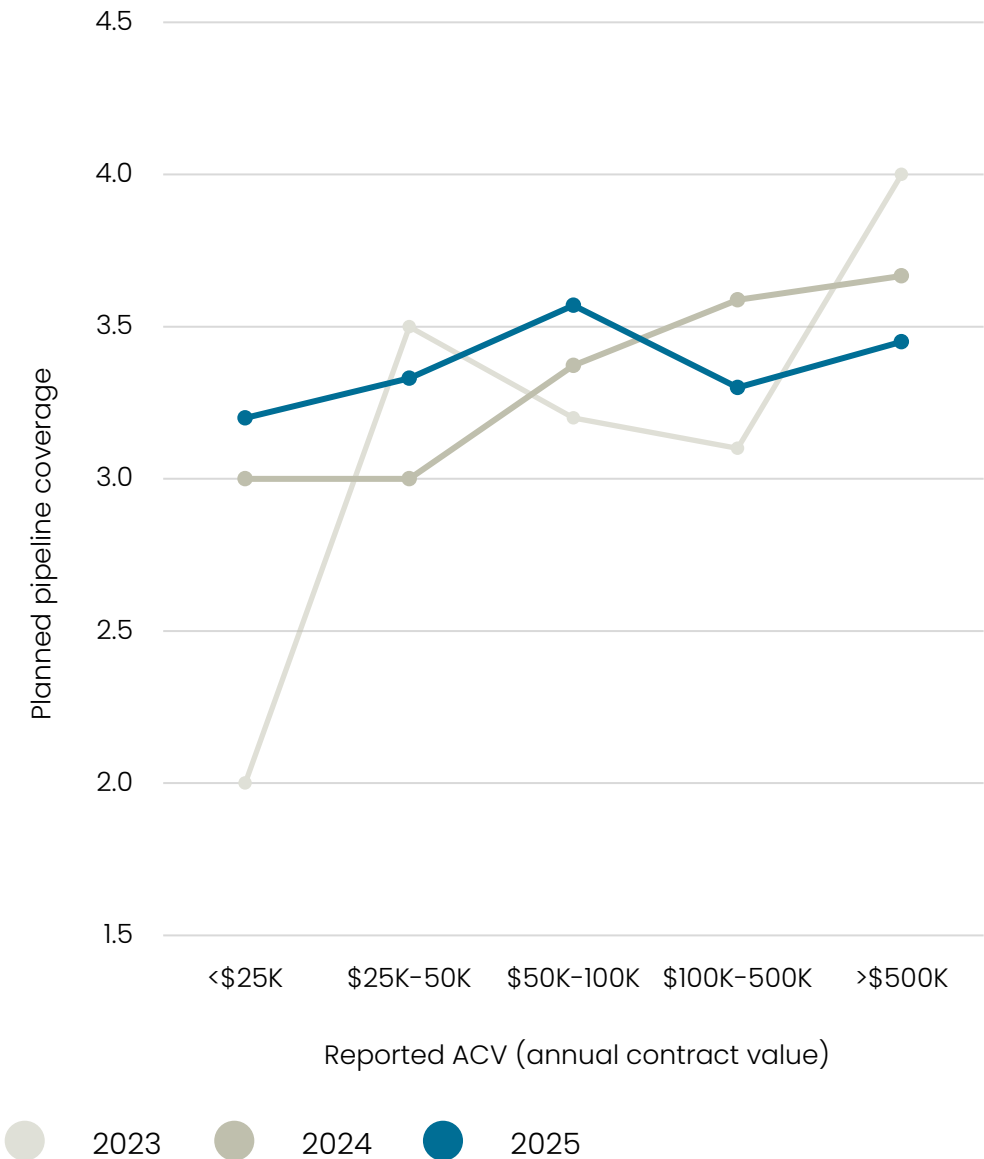
Proposal to Win



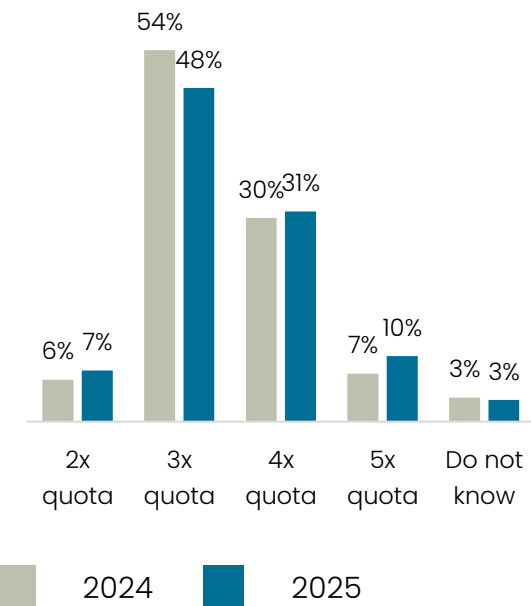
Pipeline coverage by average contract value

Q

How much qualified pipeline coverage do you plan for to achieve revenue targets?



YOY summary of planned pipeline coverage

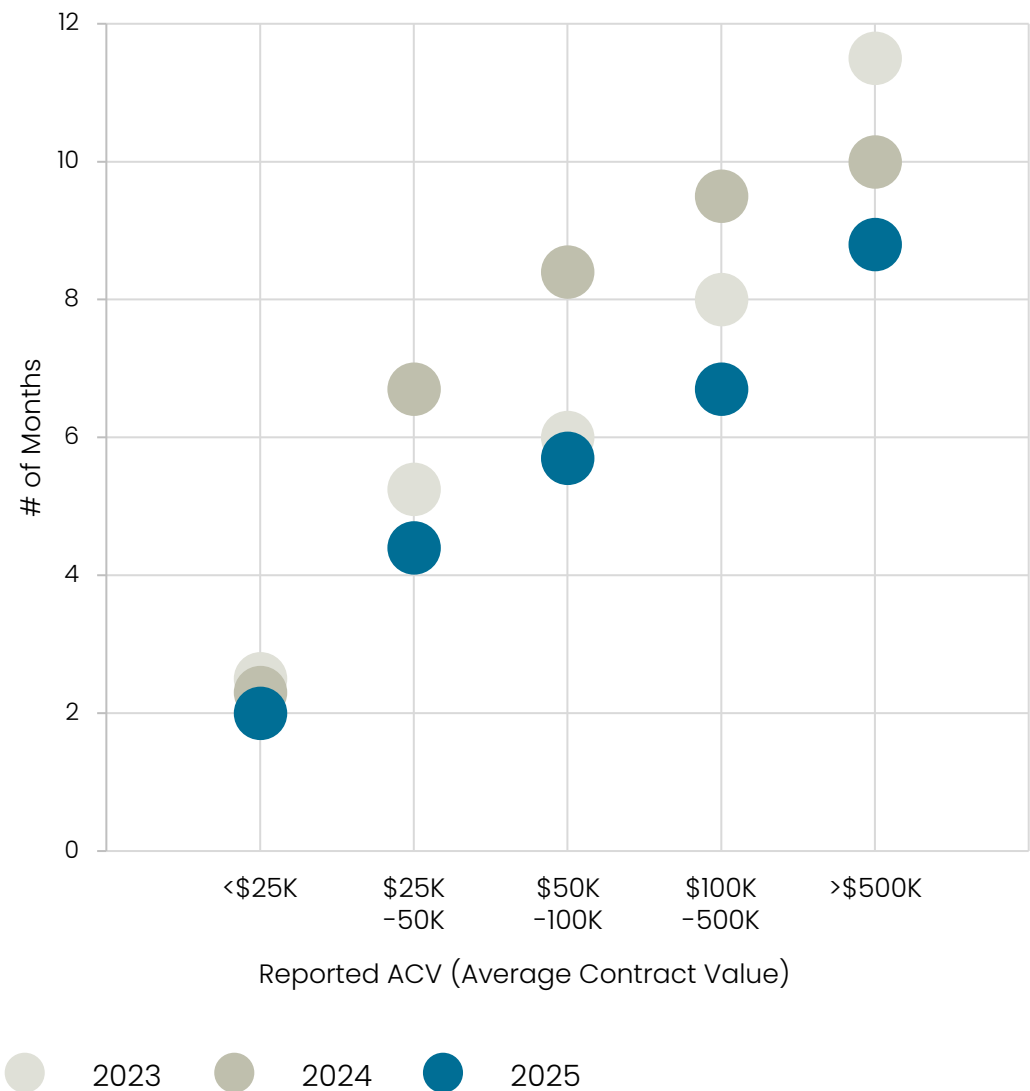


Most aim for a ~3x quota as the 'sweet spot' for pipeline coverage (48% in 2025), with fewer leaning on a 2x or 5x quota. Results in 2024 and 2025 remained steady, compared to the greater variability observed in 2023.

Average sales cycle length by deal size

Q

What is your company's average sales cycle length?



Sales cycles scale with ACV:

Longer cycles are a predictable reality as deal sizes grow, and forecasts must reflect this.

Delays create growing strain:

While cycle lengths haven't materially increased YoY, more organizations flag them as a top challenge, underscoring the importance of accelerating velocity.

Average quota attainment by company size



What was your average quota attainment for your AEs/field sales reps last year?

Quota attained	Early stage (<\$15M)	Mid-market (\$16M–\$100M)	Upper mid-market (>\$100M)
91 to 100%	9%	5%	40%
81 to 90%	11%	26%	20%
71 to 80%	11%	26%	10%
61 to 70%	11%	29%	0%
51 to 60%	19%	5%	20%
Less than 50%	19%	8%	10%
Do not know	21%	0%	0%



Quota attainment improves with scale:

40% of upper mid-market companies reported 91-100% quota attainment, far outpacing smaller organizations.

Mid-market clusters in the middle:

Most mid-market companies report attainment between 61-90%.

Early stage shows greater variability:

These companies are more likely to underperform, with nearly 40% reporting attainment below 60%.

Percentage of AEs/Field Sales that meet/exceed quota

Q

What percentage of your AEs/Field Sales reps meet or exceed quota regularly?

% of AEs/Field Sales Reps	Early stage (<\$15M)	Mid-market (\$16M–\$100M)	Upper mid-market (>\$100M)
91 to 100%	9%	0%	10%
81 to 90%	4%	5%	0%
71 to 80%	9%	29%	0%
61 to 70%	2%	11%	40%
51 to 60%	13%	11%	0%
41 to 50%	13%	5%	20%
31 to 40%	9%	8%	10%
21 to 30%	9%	18%	20%
11 to 20%	2%	11%	0%
1 to 10%	4%	3%	0%
0%	9%	0%	0%
Do not know	19%	0%	0%



Early stage volatility:

Smaller companies show broader variation, with some outperforming but many reporting low regular attainment (<50%). This highlights greater dependency on individual performance and likely less predictable pipelines.

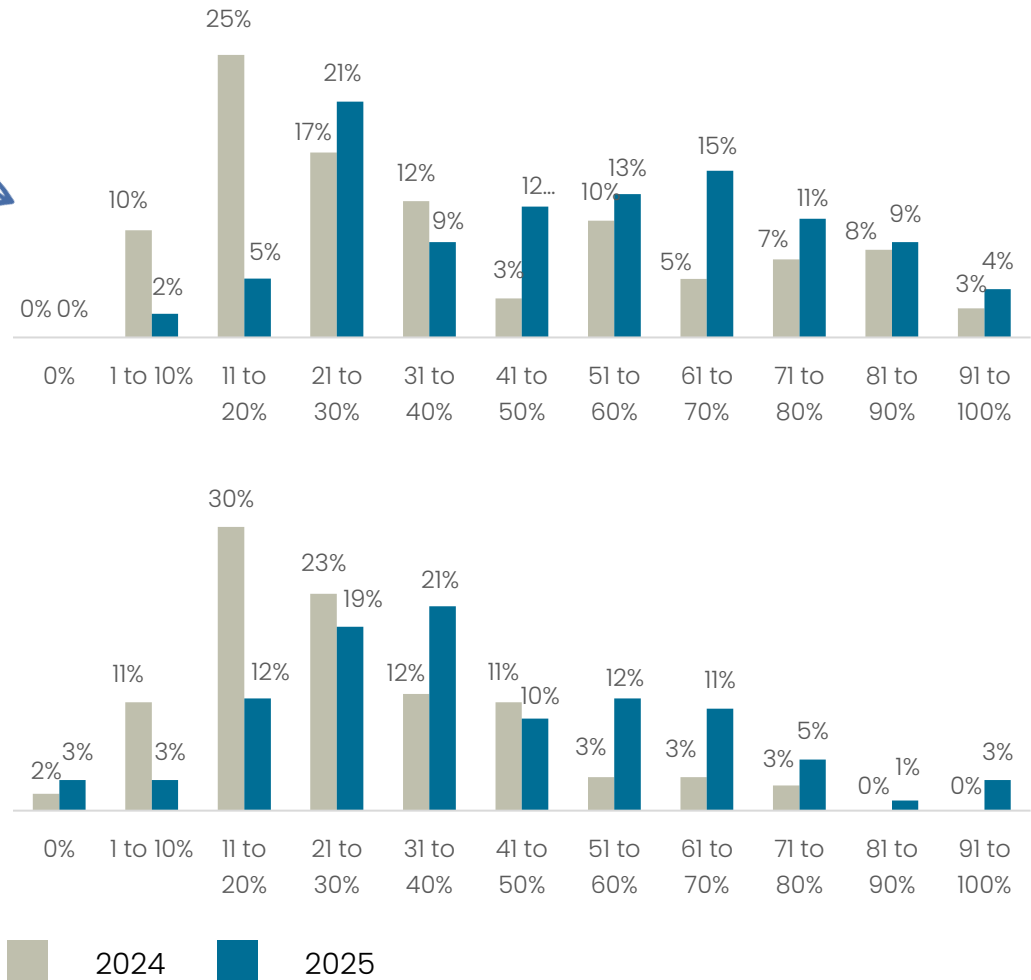
Mid-market steadiness:

Larger companies more often cluster in 61%+ ranges compared to early-stage peers. This may suggest more mature sales enablement, forecasting discipline, and pipeline predictability.

Expected revenue from new business and expansion

Q What percentage of your total new revenue target is expected to come from new business (new logos)?

Q What percentage of your total new revenue target is expected to come from upselling existing customers?



Leaders expect more balanced contributions between new business (51%) and expansion (41%) revenue in 2025, compared to lower expectations for both sources in 2024.

While new logos, on average, remain slightly ahead, upselling existing customers is projected to contribute a meaningful share of new revenue, **signaling stronger focus on customer expansion strategies.**

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Sales & Marketing Performance Metrics

Marketing Performance



Top KPIs used to measure marketing success



What are the top 3 KPIs you measure to track the success of your marketing organization?



Lead generation varies by scale:
Smaller companies (<\$15M) lean more on net new leads while larger organizations focus more on MQLs.

	<\$1-\$5M	\$6M-\$15M	\$16-\$25M	\$26-\$50M	\$51-\$100M	>\$100M	All Cohorts
Share of Voice	8%	7%	0%	8%	9%	0%	6%
Social Reach	3%	7%	31%	0%	9%	0%	7%
Social Engagement	8%	13%	23%	0%	18%	9%	11%
Website Metrics	19%	0%	23%	17%	9%	18%	15%
Net New Leads	42%	53%	15%	17%	0%	18%	30%
Engaged Leads	28%	27%	0%	17%	9%	9%	18%
Engaged Accounts	3%	13%	23%	8%	18%	18%	11%
MQLs	36%	20%	31%	42%	64%	46%	38%
Meetings	22%	20%	23%	25%	36%	27%	24%
Opportunities (#)	19%	33%	15%	50%	27%	9%	24%
Opportunities (\$\$)	47%	47%	62%	58%	73%	73%	56%
Win Rate	11%	20%	23%	25%	18%	9%	16%
Closed Deals	33%	40%	31%	25%	9%	64%	34%

Pipeline value dominates:
Opportunities (\$\$) is the most consistently tracked metric.

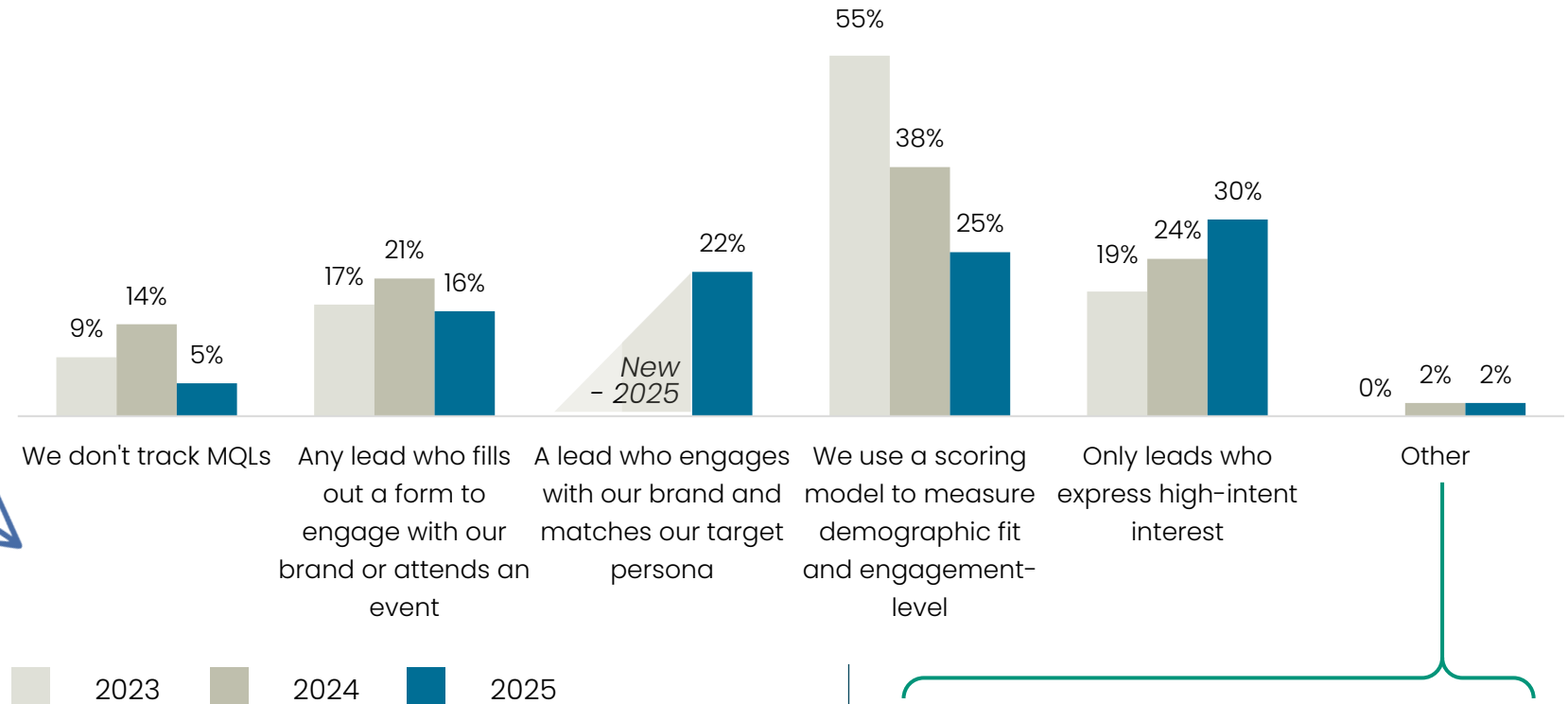
Upper funnel metrics are secondary:
Share of voice, social reach, and engagement tend to be lower priority measures.

How organizations are defining MQLs

Q

Which statement below best describes how your organization defines a Marketing Qualified Lead (MQL)?

(Select the one that best applies.)



Organizations are **simplifying MQL definitions**, focusing on fit and intent and aligning more tightly with sales, without relying on overly complex scoring models.

"Other" open-ended follow-up responses

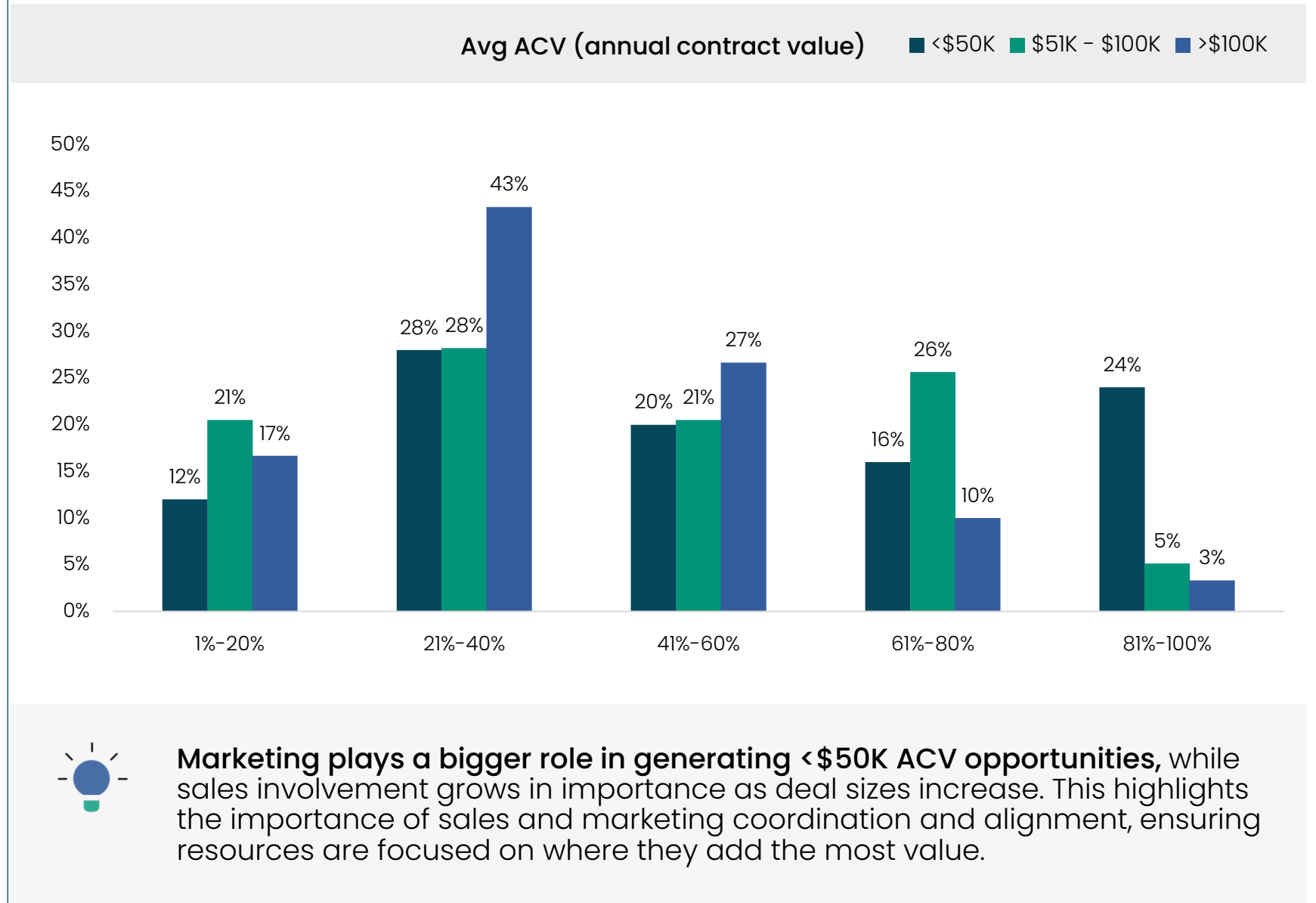
"We have an ABM approach and monitor MQAs vs MQLs - an MQA is on our target account list and one of our Key personas has scored high enough to be engaged"

"We track meetings"

% of opportunities sourced from inbound marketing



On average, what percentage of opportunities are sourced from Marketing?



% of organizations unaware of average CAC* or CPL



Measurement gaps:

Many companies lack visibility into core efficiency metrics, pointing to ongoing challenges in tracking and analytics.

Sales cycle effect:

Longer, complex cycles make CAC and CPL harder to calculate—70% of firms with sales cycles over 6 months did not know CAC, and 50% did not know CPL.

Smaller firms show less measurement:

Over half of <\$5M revenue organizations could not report CPL (53%) or CAC (61%).

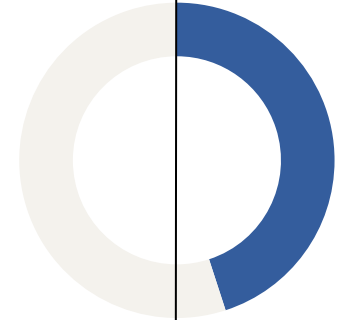
Overlap in gaps:

78% of firms that did not know CPL also did not know CAC.

**i.e. Total sales and marketing spend required to acquire a new customer (CAC = sales & marketing costs related to acquisition ÷ number of new customers)*

45%

of respondents did not know their Average Customer Acquisition Cost (CAC)*



41%

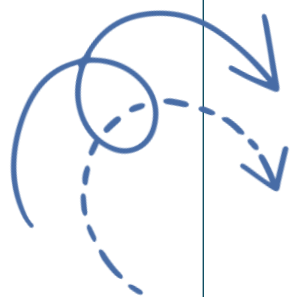
of respondents did not know their Average Cost Per Lead (CPL)



Average cost-per-lead by annual contract value

Q

What is your average cost-per-lead?



Average of reported costs-per-lead

\$387

<\$50K ACV

\$1,365

\$50-\$100K ACV

\$4,129

>\$100K ACV

Reported annual contract value.

41%

of respondents selected they "Do not know" their average cost per lead



Costs scale with deal size:

Leads for >\$100K ACV deals can average over 10x higher than <\$50K ACV leads.

Mid-tier ACV costs escalate:

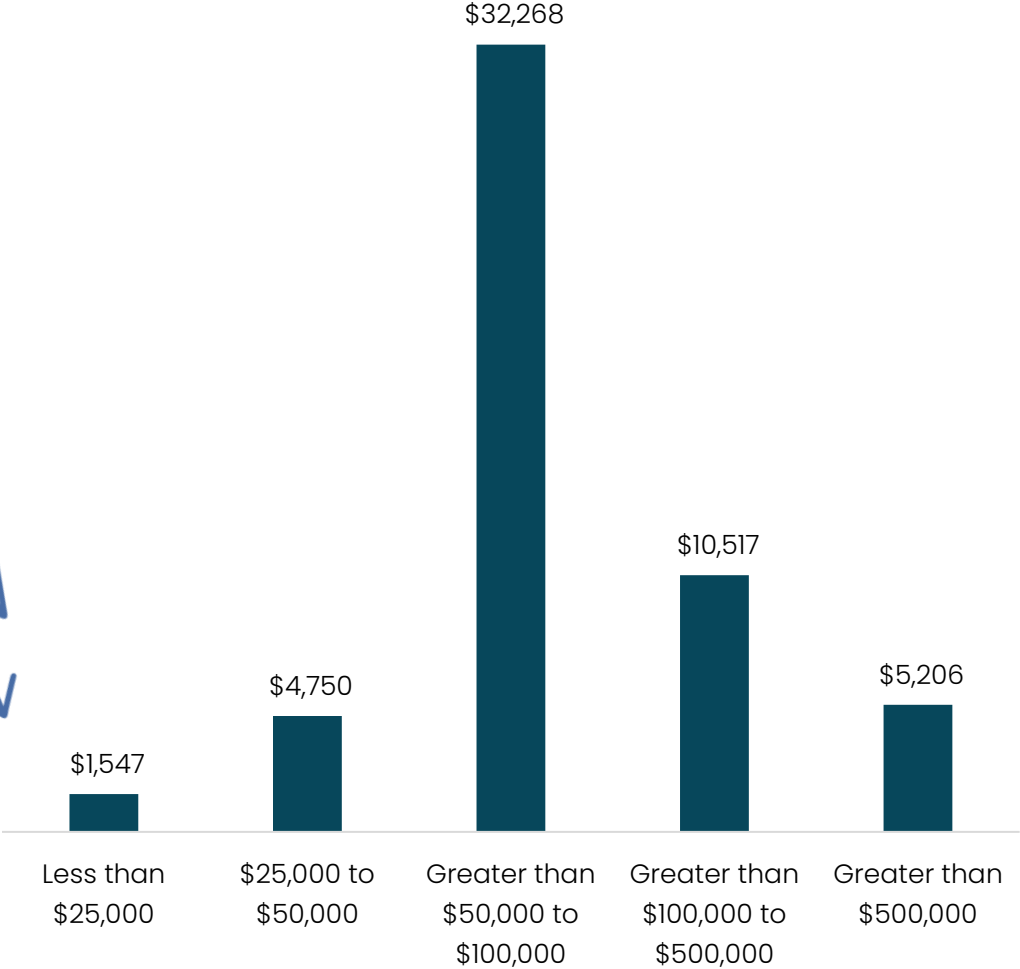
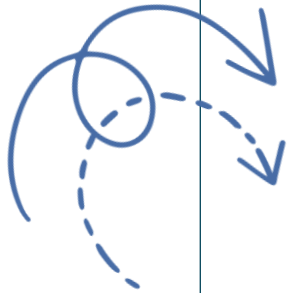
\$50K-\$100K ACV sits at **\$1,365 per lead**, showing cost ramps sharply once deal size grows.

Data gap:

41% of companies do not know their CPL, highlighting weak cost visibility that can limit ROI management.

Average customer acquisition cost (CAC) benchmarks

Average customer acquisition cost by average ACV



45%

of respondents selected they “Do not know” their average customer acquisition cost



Data gap:

45% of companies do not know their CAC, highlighting weak cost visibility that can limit ROI management.

Among those who do track CAC, estimates vary widely

likely due to sales model differences, stage of company and product complexity. Data also likely signals inconsistent measurement practices, with some over- or under-allocating expenses to CAC.

Observed YoY marketing performance trends

Q



Compared to the prior year, how has your organization’s marketing performance changed across the following areas?

	Improved	Worsened	No Change	Not Sure
Marketing-sourced leads	68%	15%	11%	5%
Marketing-sourced revenue (closed won)	56%	13%	24%	7%
Marketing ROI	54%	15%	20%	10%
Cost per lead (CPL)	36%	15%	28%	21%
Customer acquisition cost (CAC)	36%	14%	26%	25%



Strongest improvements are in lead gen:
A majority report improved performance in marketing-sourced leads.

Measurement gaps exist:
Cost metrics such as CPL and CAC have the highest share of ‘not sure’ responses, highlighting challenges in tracking efficiency.

Large organizations were more likely to see CPL improvements:
Note that 64% of companies over \$100M in revenue report improved Cost Per Lead, compared to 20% of those \$6M–\$15M and 25% of those <\$1M–\$5M (not shown).

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Go-to-Market Practices & Strategies

2025 B2B Sales & Marketing
Benchmark Survey



NORWEST

Go-to-Market
Practices
& Strategies

**Strategic
Alignment**



GTM challenges and revenue priorities



Top 5 Challenges	Sales		Marketing	
Positioning our product as a “must-have” for our buyers	44%	1	48%	1
Longer sales cycles	43%	2	47%	2
Increased budget scrutiny	35%	3	29%	4
Crowded category/differentiation from competitors	33%	4	41%	3
Poor lead quality	22%	5	8%	-
Customer churn	21%	-	23%	5

Top 5 Revenue Priorities for Sales Leaders	
1. Expanding existing accounts	55%
2. Increasing new logos	44%
3. Increasing average deal size	39%
4. Improving sales productivity	36%
5. Improving customer retention	36%



Sales and marketing leaders cite similar top challenges:

Positioning, longer cycles, and churn. These challenges are reflected in top revenue priorities, showing obstacles are also drivers of priorities.

Lead quality:

Sales is almost 3x more likely to cite poor lead quality as a challenge (22% vs. 8%), highlighting a common friction point in how each team defines and evaluates leads.

Budget scrutiny:

While felt by both, sales proximity to procurement hurdles makes the challenge more prominent. Both sales and marketing can support with clear messaging on ROI.

Crowded category/differentiation:

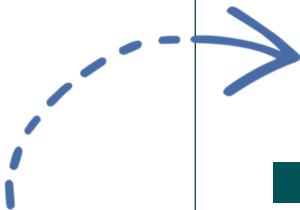
Marketing experiences challenges breaking through early in the buyer journey. Sales is less likely to feel this pressure downstream as initial research has been conducted.

Sales and marketing alignment on GTM execution

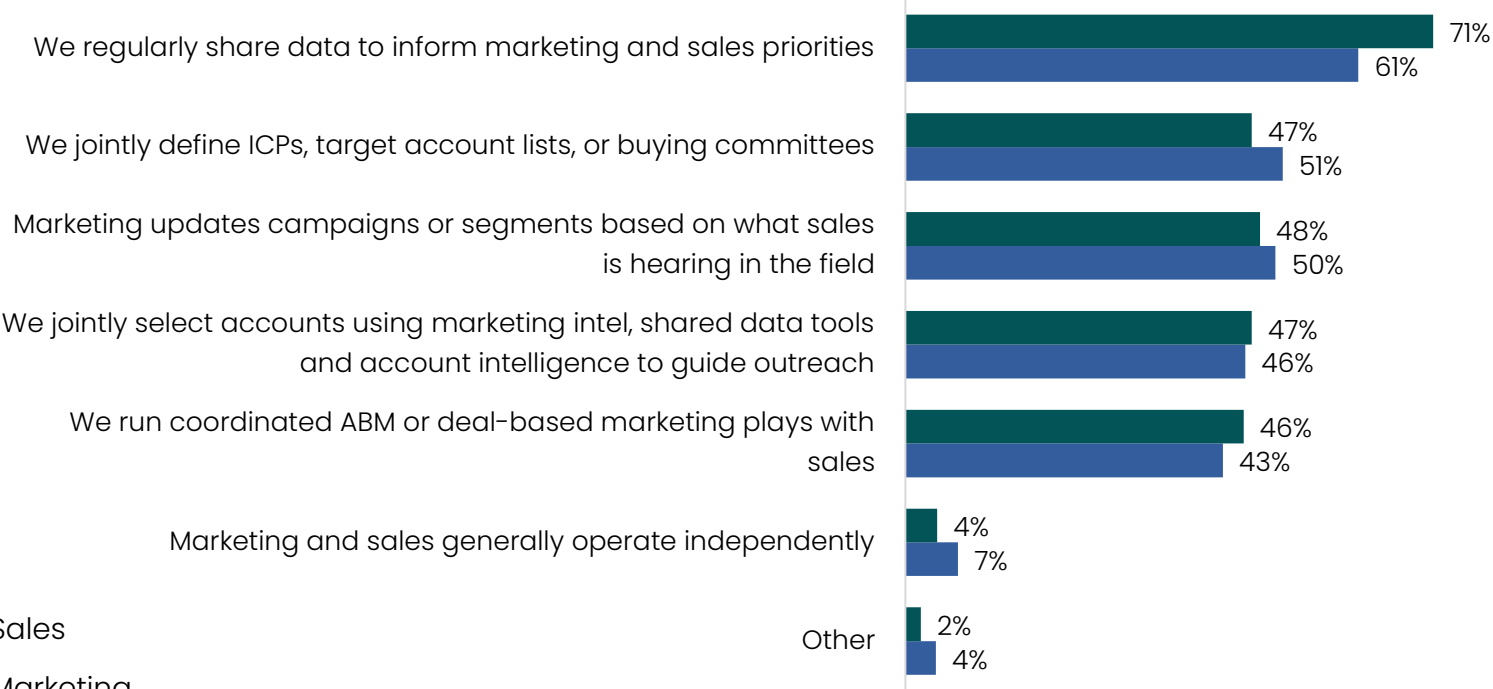


How closely are your marketing and sales teams aligned on audience targeting and execution?

(Select all that apply)



 Sales
 Marketing



Marketing and sales responded similarly:
There are only small differences (typically <10 pts) between sales and marketing responses, demonstrating agreement on the extent and nature of alignment.

While response alignment is high, collaboration is less so:
While most teams say they share data, only about half of organizations are coordinating on go-to-market plays and optimizing strategies based on shared feedback.

Strategic targeting is siloed:
Only about half of sales and marketing leaders jointly define ICPs or target accounts, indicating many lack a unified targeting strategy.

NORWEST

Go-to-Market
Practices
& Strategies

**Revenue
Strategies:
Forecasting,
Retention,
and Growth**



Revenue reforecasting trends by company stage

Q

*In the last 12 months,
have you made any
material reforecasting
of your organization's
revenue target?*

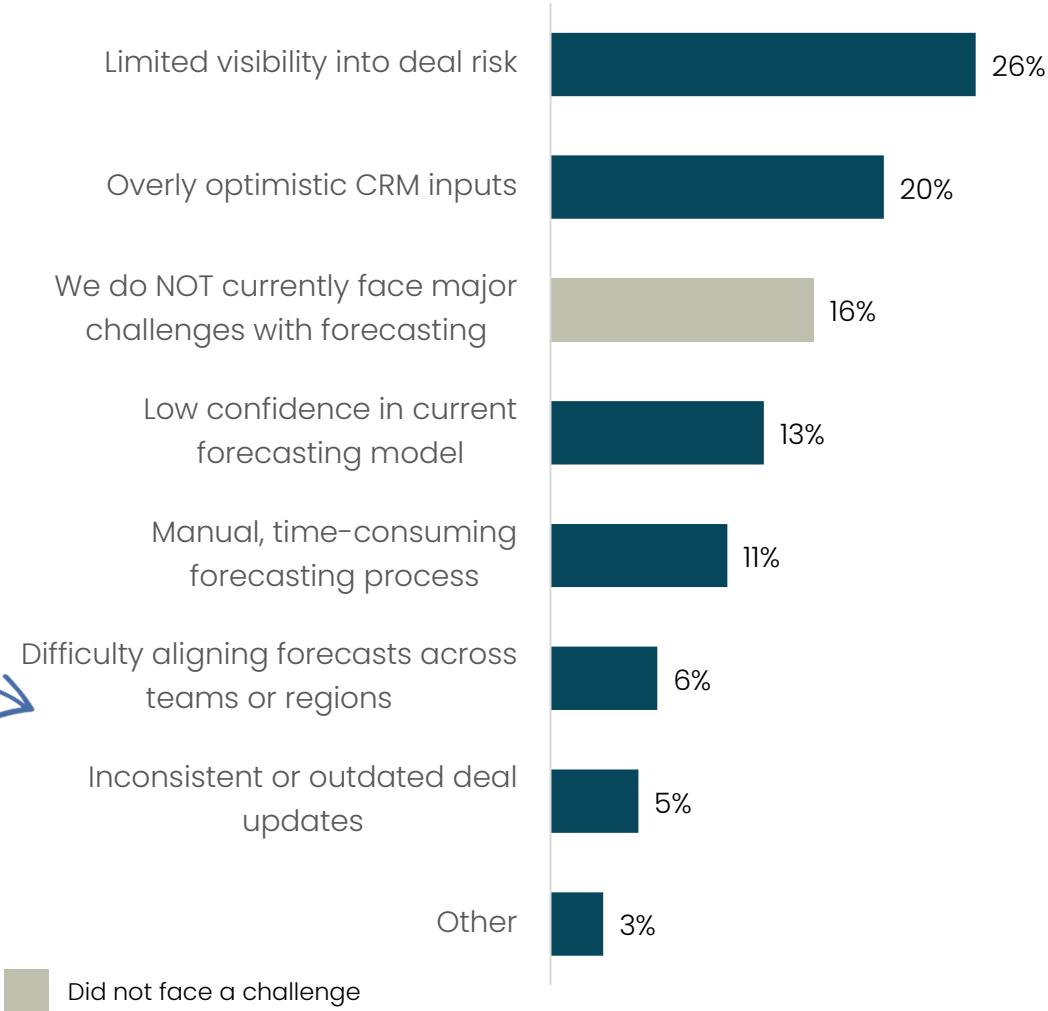
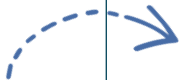


Top sales forecasting challenges

Q

What would you describe as your organization’s most significant challenge with sales forecasting in 2025?

(Please select one)



Forecasting challenges are pervasive:

Only 16% of organizations say they face no major forecasting issues, meaning 84% do face challenges.

Seller inputs and risk assessments drive the most challenges:

Nearly half (46%) of challenges relate to sellers misjudging deal risk or over-reporting in CRM systems. When factoring in outdated or inconsistent deal updates, that rises to 51%. This points to forecasting process and training gaps.

Fixing forecasting starts with discipline:

Implementing or improving manager-led deal reviews, enforcing CRM hygiene, and training sellers on deal qualification are levers that can help restore forecasting accuracy.

Retention, renewal, & expansion of existing customers

Q

What programs are in place to support retention, renewals, and expansion at existing customers?

(Select all that apply)



Baseline:

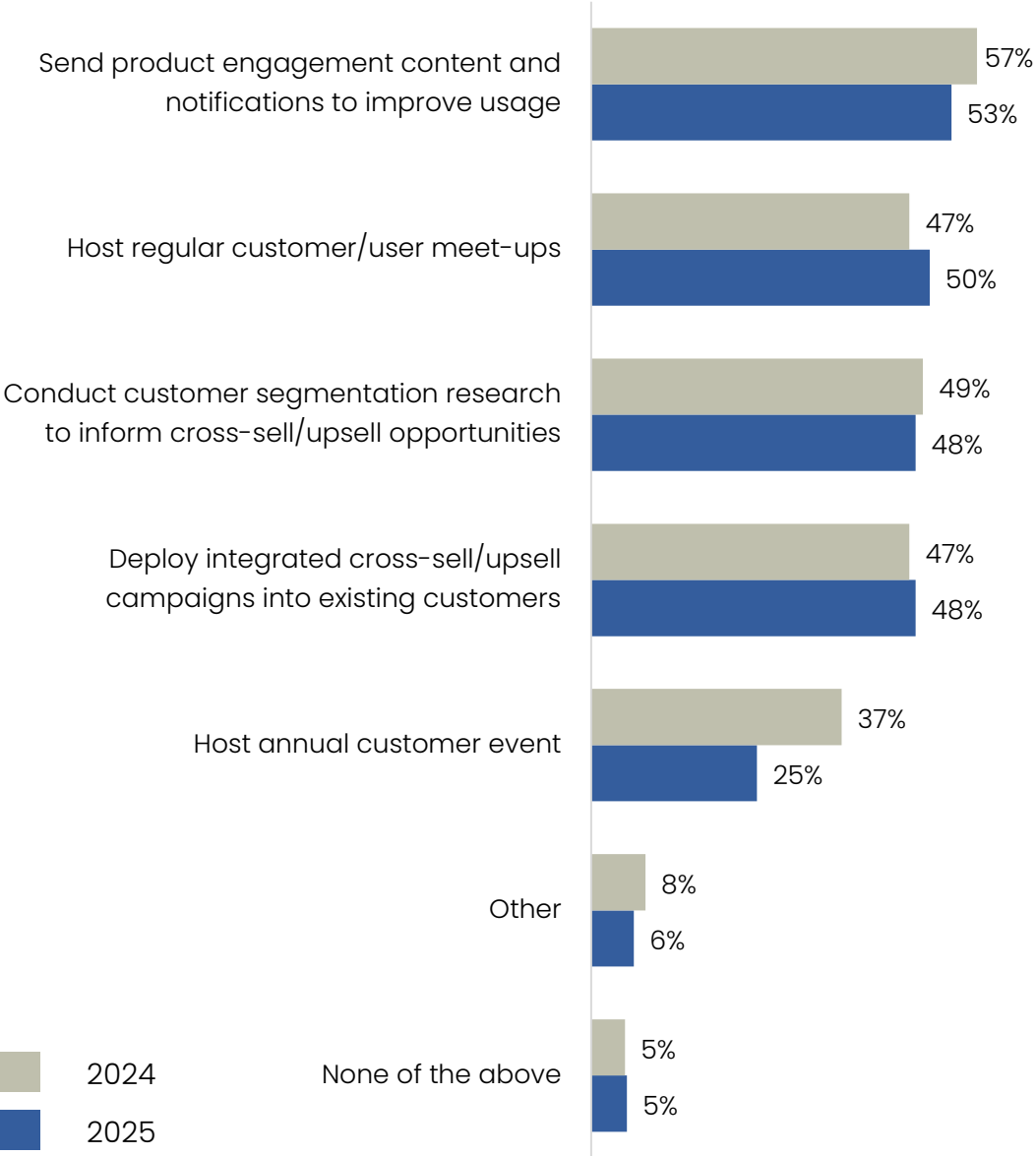
Product engagement content and notifications is the most common tactic YoY.

Expansion & connection:

Meet-ups (50%), segmentation research (48%), and cross-sell campaigns (48%) share similar weight.

Annual events:

Annual event prevalence is concentrated among larger companies. 30% of companies over \$50M host annual events vs. 10% of those \$5M and under, driving the overall decline (breakdown not shown).

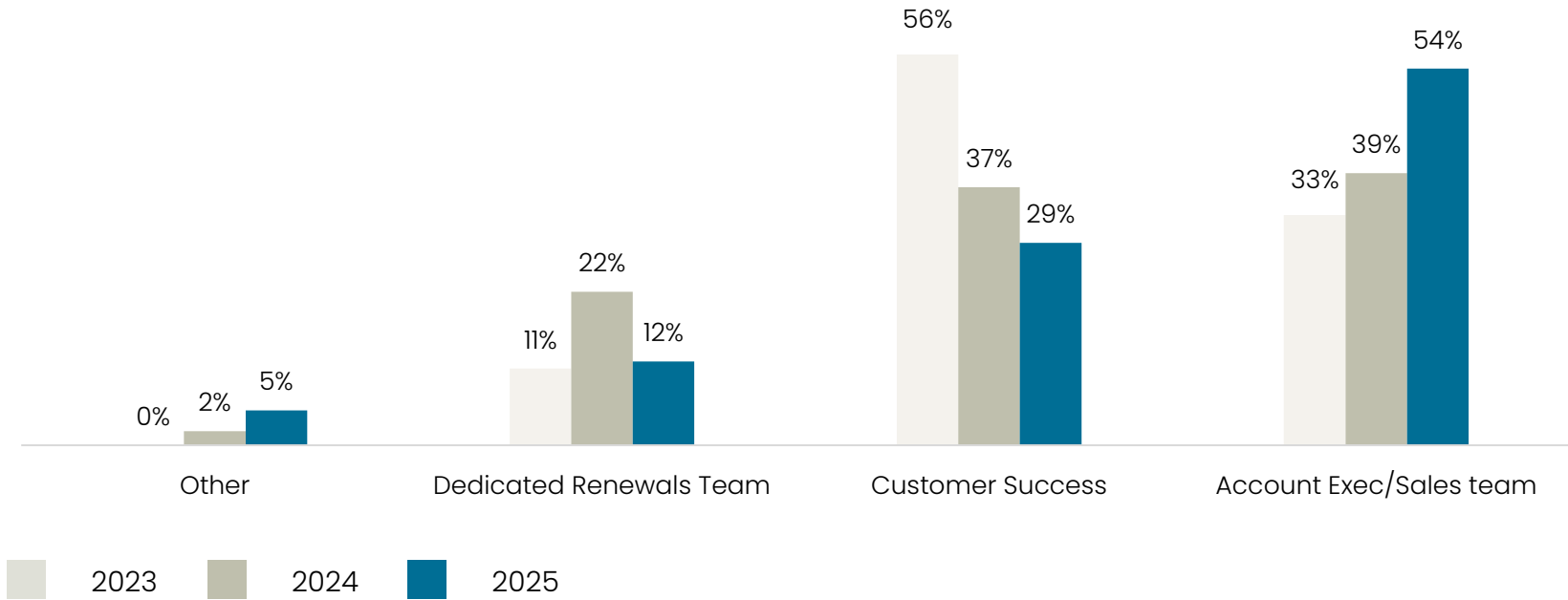


Teams responsible for renewals



Q

Who is responsible for renewals?



Renewal ownership is continuing to shift from Customer Success to Sales

as organizations realign skills to business objectives, with Sales driving revenue outcomes and Customer Success focusing on satisfaction and retention.

As organizations grow, they may incorporate a Dedicated Renewals Team

(0% for those ≤\$5M vs. 17% for those over \$5M – not shown), further emphasizing the shift to realign skills to business objectives.

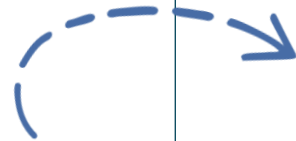
As this shift takes place, it is important that customer satisfaction remains top of mind to ensure lasting relationships.

Top tactics for improving seller productivity



What is your organization currently doing to improve seller productivity?

(Select all that apply)



Broad focus on seller productivity:

High adoption across tactics signals that boosting productivity is a clear priority.

Process standardization dominates:

66% are standardizing processes and playbooks.

Tactical fixes are more common:

Fewer are adjusting compensation (41%) or territory redesign (32%). While these are adjusted less frequently by design, around one-third of organizations are currently revisiting these strategies.

Technology is prominent:

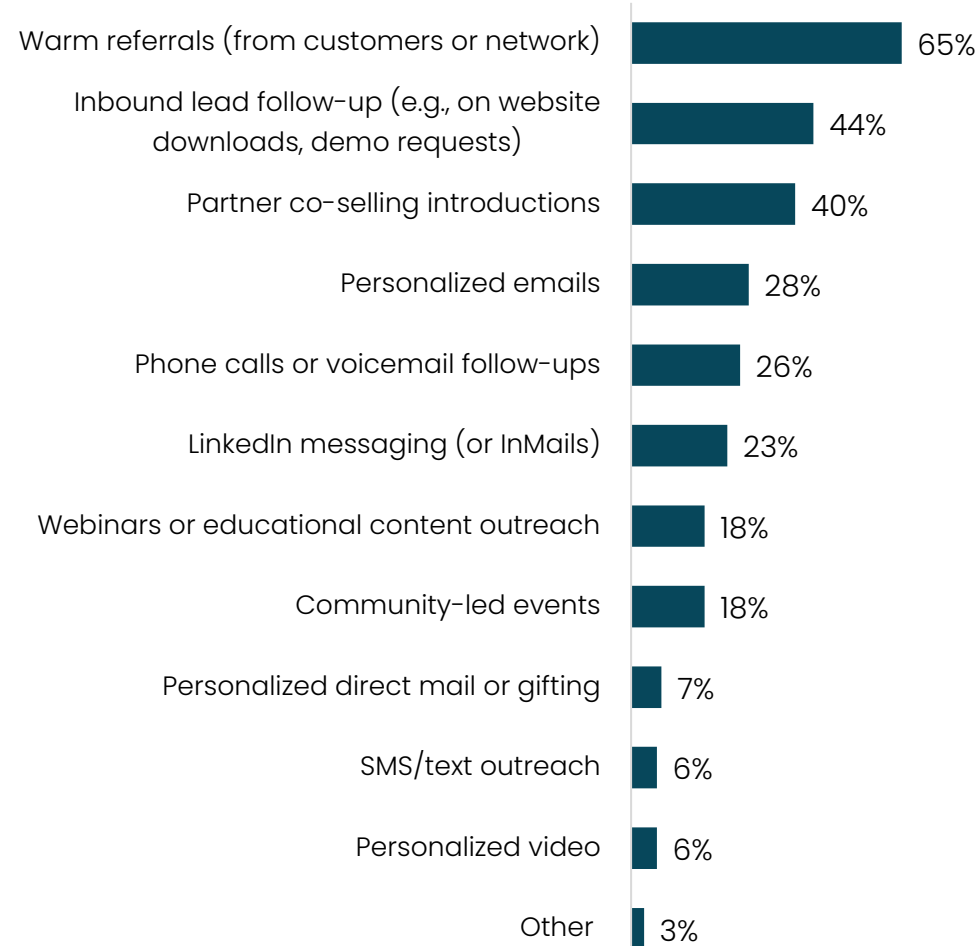
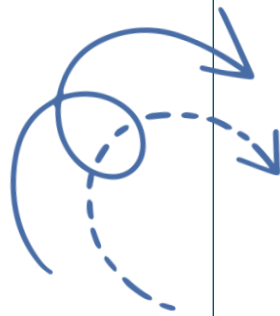
AI/automation is being used by over half of organizations (58%) to reduce manual effort.

Most effective sales outreach tactics

Q

Which sales outreach tactics have been most effective for your organization in generating engagement or conversions?

(Select up to 3)



Warm referrals dominate:

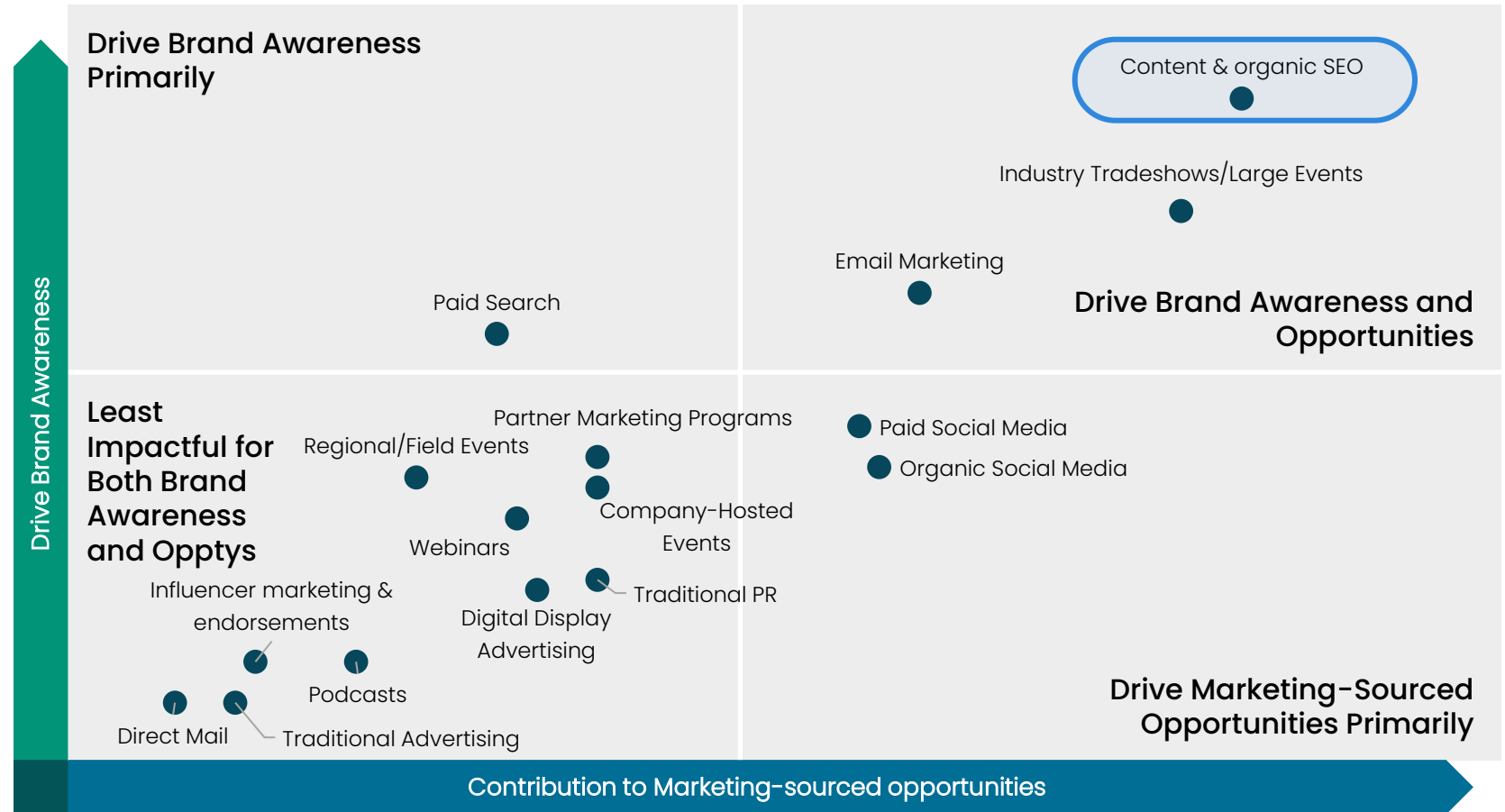
65% rate them as top tactic, far ahead of all other tactics.

Inbound follow-up (44%) and partner co-selling (40%) form the next tier of effectiveness.

Digital personalization delivers middling results:

emails, calls, and LinkedIn drive moderate impact, while tactics like video, SMS and gifting add little.

Which marketing programs contribute to/drive marketing-sourced & brand awareness opportunities?



Content & SEO lead now. Not included is the emerging **Generative Engine Optimization (GEO)**, which shifts the game from ranking in search to showing up in AI-generated answers. Early adopters will lock in outsized visibility.

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AI Transformation

2025 B2B Sales & Marketing
Benchmark Survey



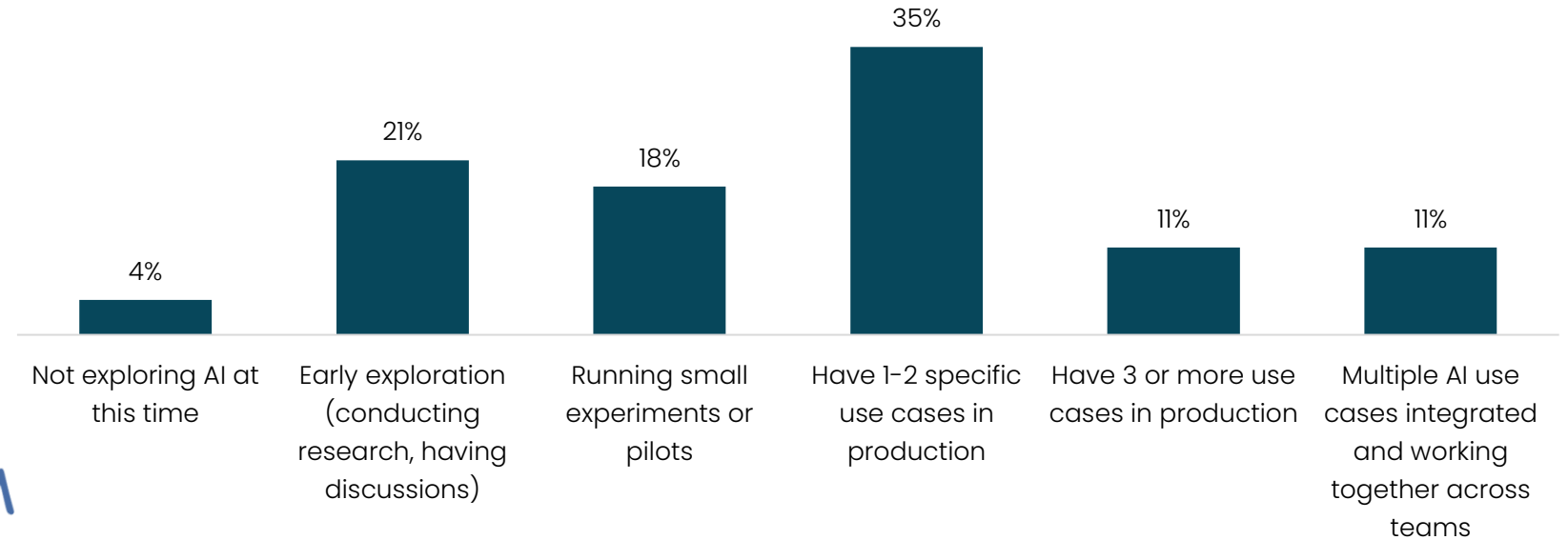
NORWEST

AI
Transformation

AI Adoption
in Sales
Organizations



AI adoption maturity in sales organizations



Where is your organization today in its adoption of AI for sales use cases?



Early AI adoption stages dominate:

74% are researching, piloting, or running only 1–2 AI use cases.

Few are scaled:

Just 11% of organizations have reached cross-team integration in their sales AI use cases.

Engaged, not absent:

Only 4% aren't exploring AI at all, underscoring that nearly every sales organization sees AI as strategically relevant and is at least exploring AI use cases.

Top AI use cases driving sales impact

Q

Which of the following AI-enabled use cases have delivered the most impact for your Sales organization?

(Select up to 3)



Enablement, including enabling outreach, dominates:

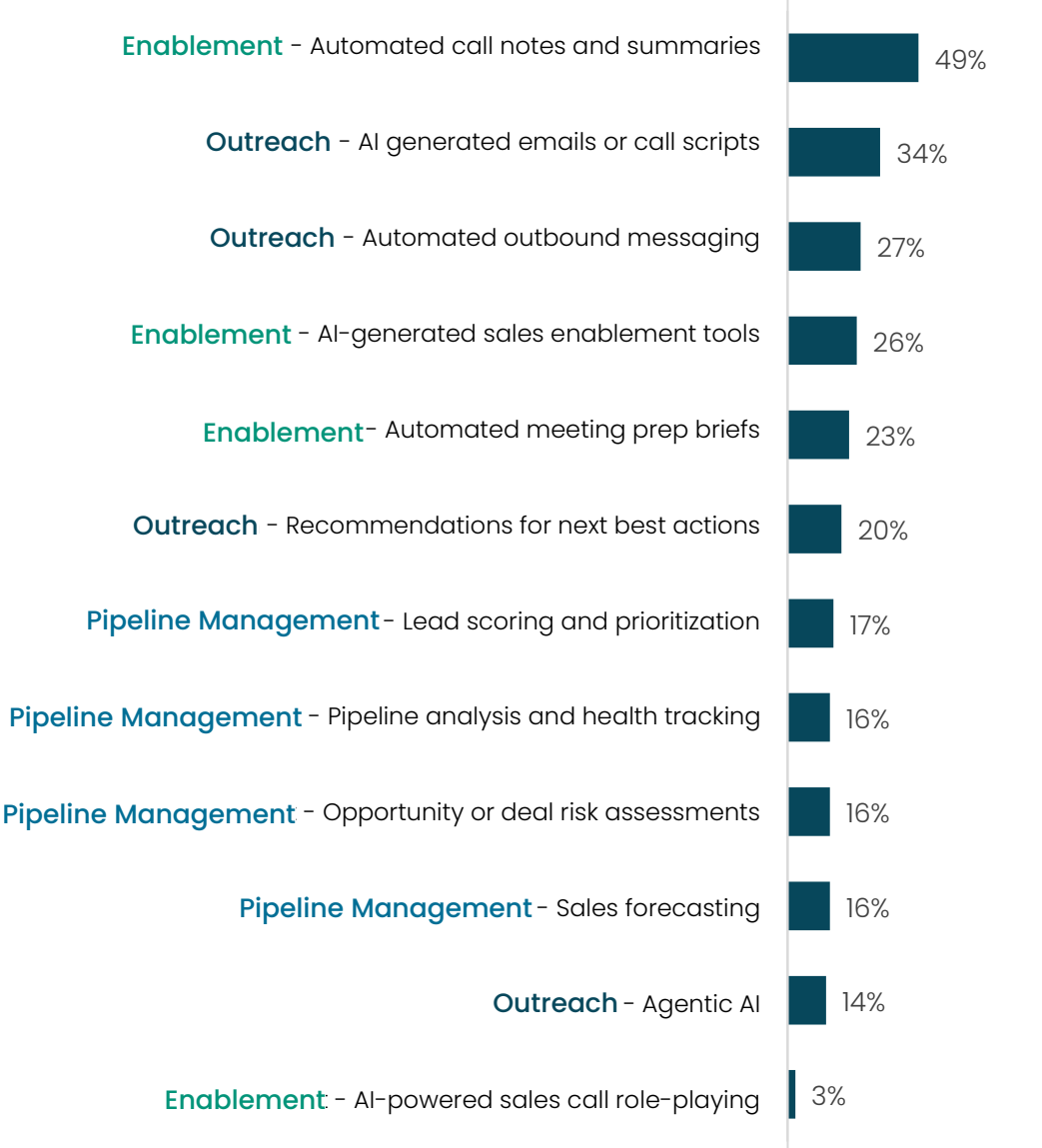
Call notes (49%), AI-generated emails or call scripts (34%), and outbound messaging (27%) lead adoption.

Pipeline use cases emerge with AI maturity:

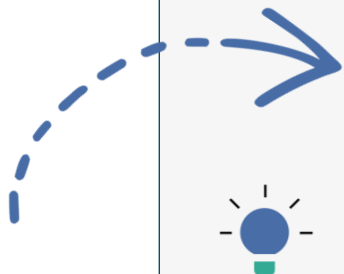
While pipeline use cases lag overall, those with greater AI usage (3+ use cases or integrated use cases) were more likely to select pipeline analysis and sales forecasting (both 30%) than those with only 1-2 use cases (both 9%).

From efficiency to intelligence:

Early adopters focus on efficiency while mature users are also leveraging AI for pipeline intelligence and decision support.



Observed impact from implementing sales AI use cases



Q

What impact has your organization experienced as a result of implementing AI-enabled use cases? Please select all that apply for each use case.

Efficiency dominates:

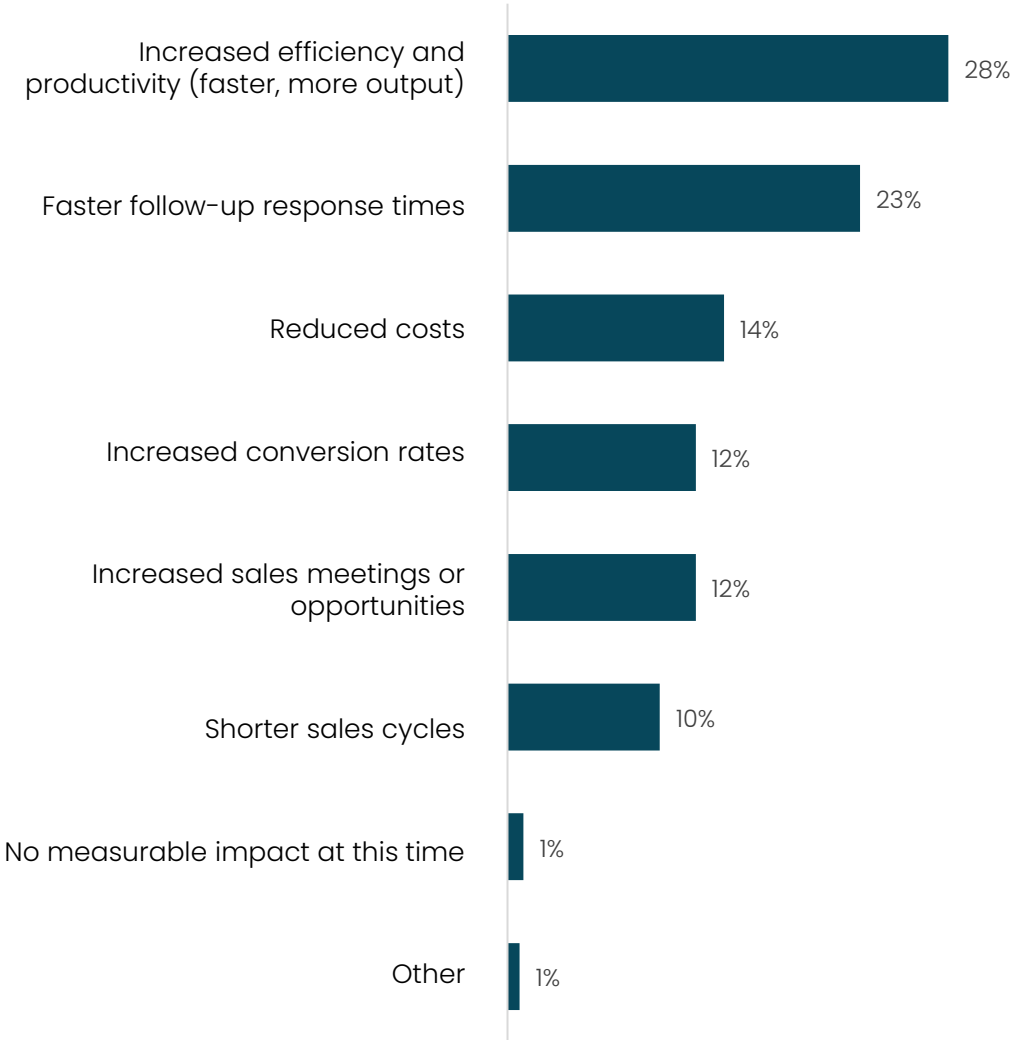
28% cite productivity gains—the clearest ROI case for AI in sales.

Responsiveness improves:

23% cite faster follow-ups and 12% cite higher conversions, showing AI is boosting execution quality.

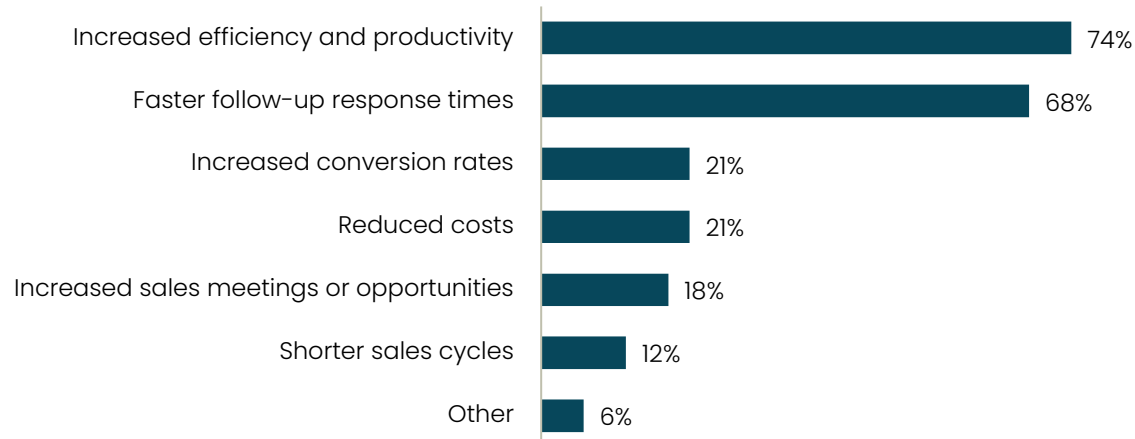
Cycles remain stubborn — for now:

Only 10% see shorter cycles, but early wins in speed and conversion signal long-term potential to reshape deal timelines.

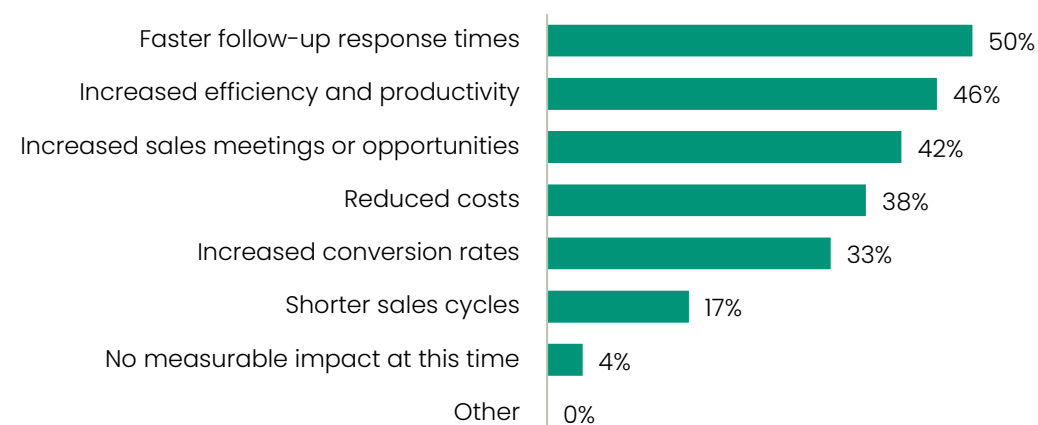


Observed **impact** from implementing sales AI use cases

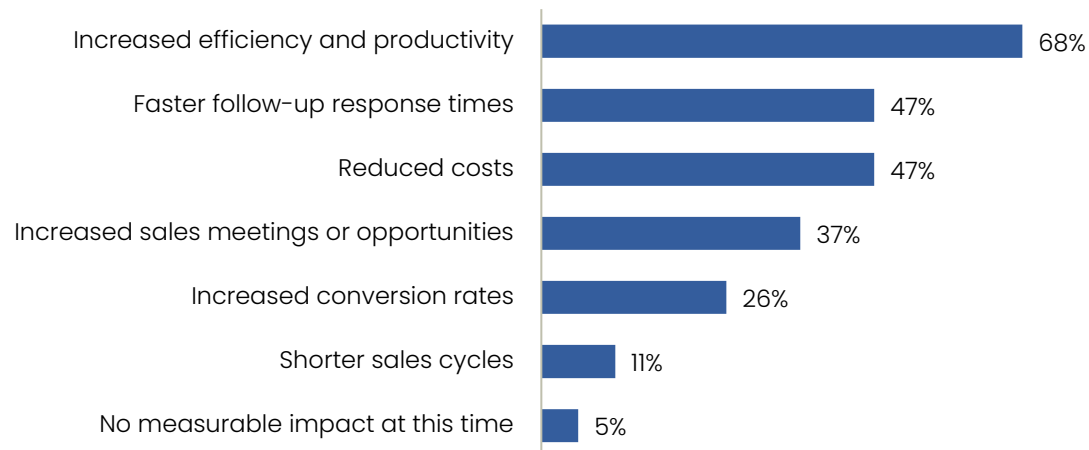
#1 Use Case – Automated Call Notes and Summaries



#2 Use Case – AI Generated Emails or Call Scripts



#3 Use Case – Automated Outbound Messaging



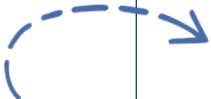
AI in call notes, email generation, and outbound messaging drives efficiency and faster follow-up, while conversion gains are evident but remain secondary.

- **Call notes & summaries:**
74% efficiency, 68% faster follow-up
- **AI-generated emails/scripts:**
50% faster follow-up, 46% efficiency, 42% more meetings/opportunities
- **Outbound messaging:**
68% efficiency, 47% faster follow-up, 47% cost savings

Barriers to AI adoption in sales organizations



What's getting in the way of your organization making more progress with adopting AI for sales?
(Select all that apply)



Leadership gap:

Key barriers include lack of a process owner (26%) and unclear use cases (21%), showing sales teams need direction more than resources.

Trust concerns:

24% cite unreliable outputs and 24% cite privacy/security, with 17% worried about customer impact.

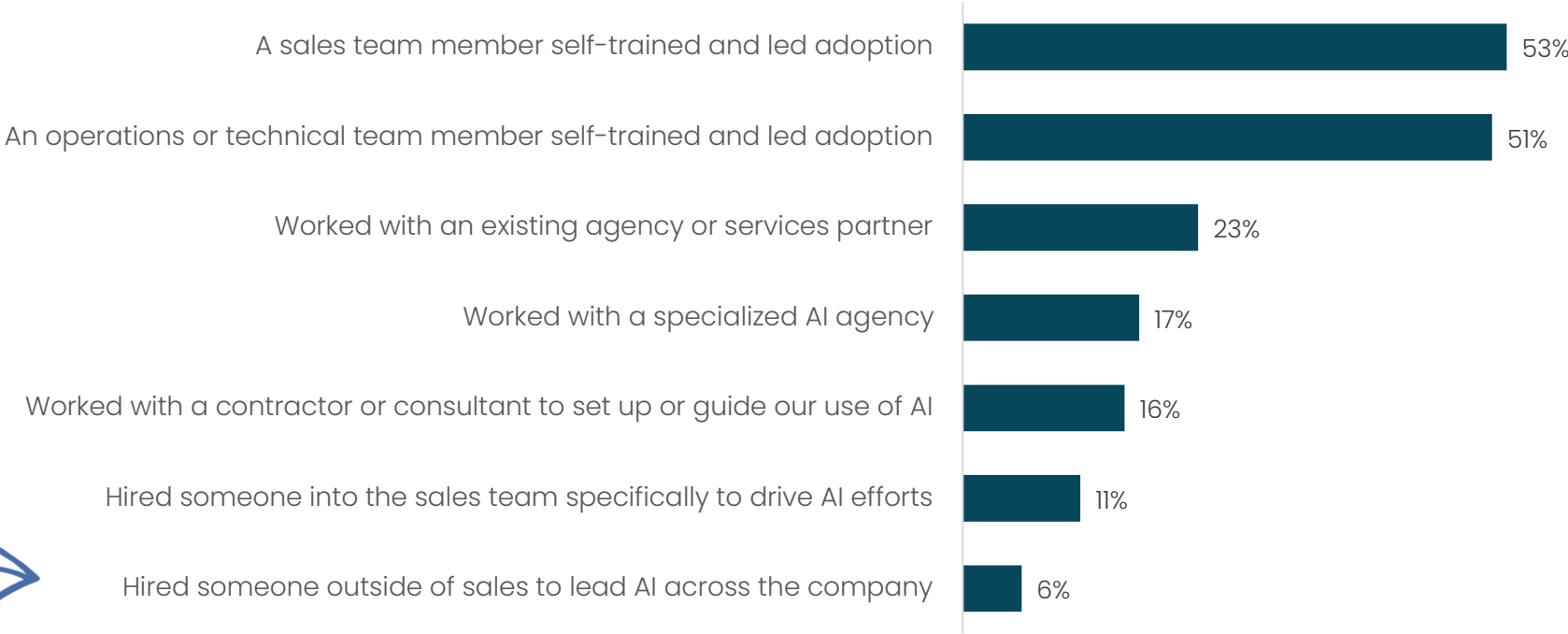
Execution readiness:

19% cite limited technical understanding, 13% budget uncertainty, and 11% integration complexity.

Opportunity:

20% report no major barriers, suggesting frameworks and ownership could unlock faster adoption.

How sales teams are implementing AI



Q

How were the AI use cases implemented?

(Select all that apply)



AI adoption is grassroots-led:
Over half of implementations are driven by self-trained sales (53%) or technical/ops (51%) team members, showing that AI skills are being absorbed organically rather than through formal hires.

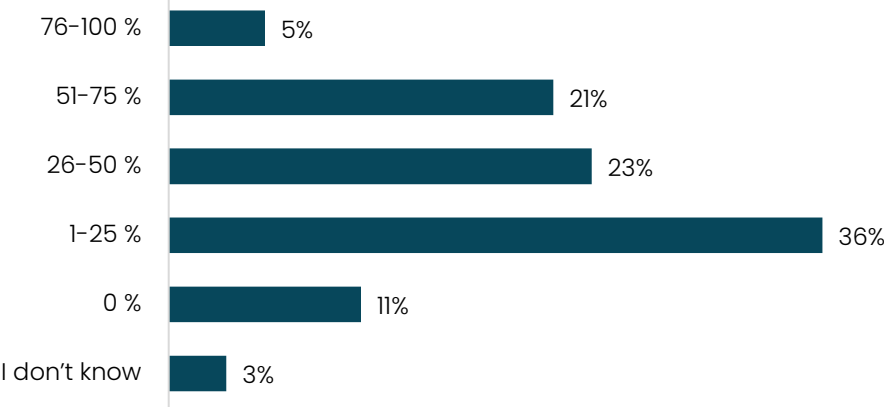
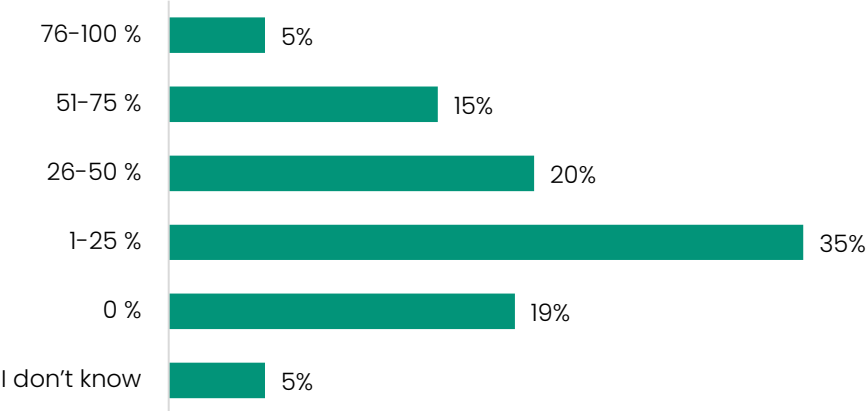
Varied external support:
Agencies (23%), specialized AI firms (17%), and consultants (16%) indicate companies sometimes lean on different external parties for support.

Dedicated AI roles are rare:
Only 11% hired into sales for AI and just 6% created cross-company AI leadership roles, underscoring that AI is viewed as an enabler of existing functions rather than a new core function.

AI adoption in sales communications

Roughly what percentage of your sales reps' responses to inbound leads are AI-generated or AI-assisted?

Roughly what percentage of your sales reps' outbound emails are AI-generated or AI-assisted?



Near-universal adoption:

Most sales teams use AI for outbound emails and inbound responses, making AI a standard part of sales communications.

Light use dominates:

~35% apply AI to just 1–25% of messages, reflecting experimentation rather than heavy reliance.

Moderate adoption:

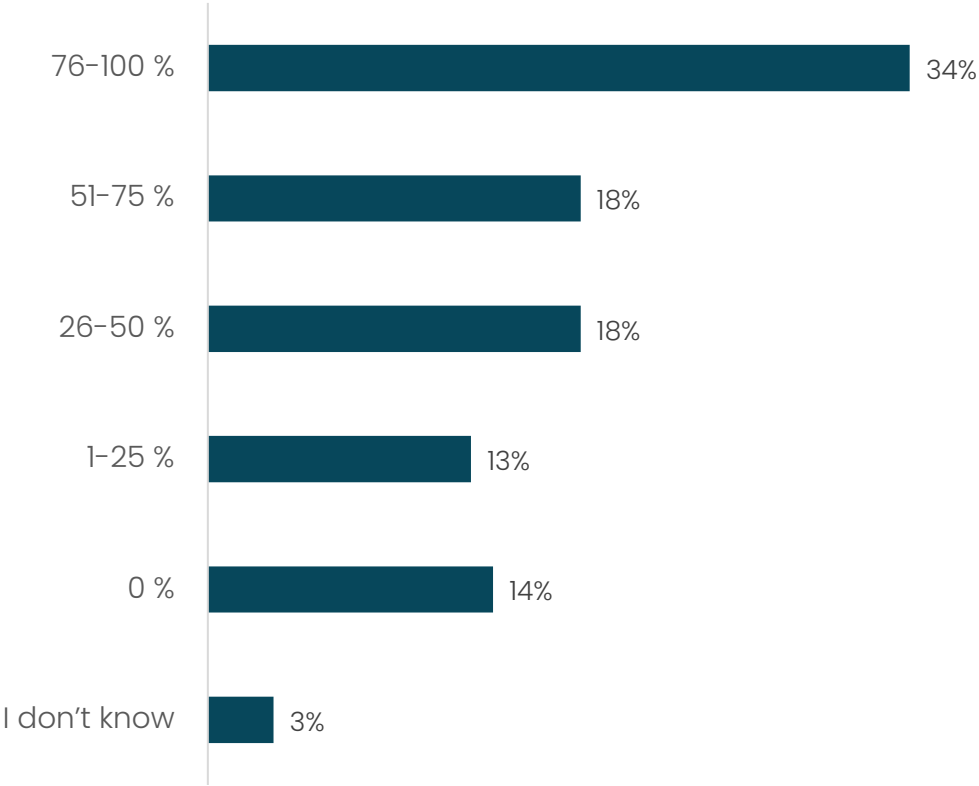
~20–23% use AI for 26–50% of messages, signaling a shift from pilots to operational use.

This signals AI is embedded but most teams are testing boundaries rather than going all-in.

AI adoption in sales call notes



*Roughly what
percentage of your
sales reps' call notes
are AI-generated or
AI-assisted?*



Heavy adoption:

34% of teams use AI for 76–100% of call notes.

Broad integration:

Another 36% use AI for 26–75% of notes, showing widespread operational reliance.

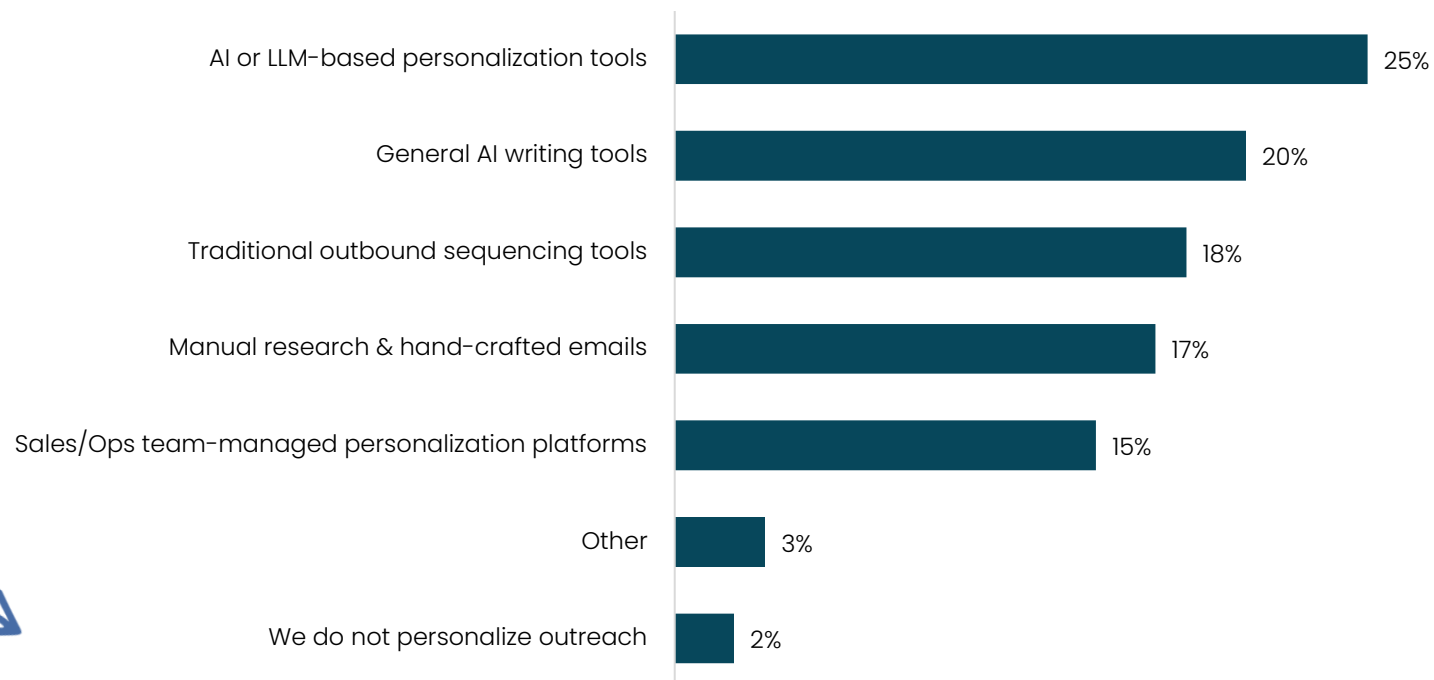
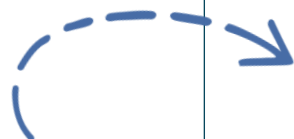
Safe starting point:

Compared to outbound/inbound emails, leaders lean on AI more for note-taking, likely because it is internal and poses less risk to the customer experience.

Prominence of outbound personalization tools

Q

Which tool/approach, if any, do you primarily use for outbound personalization?



AI leads personalization:

25% use LLM-based tools and 20% use general AI writing. Combined, AI methods now outpace traditional approaches.

Legacy and manual tactics persist:

Traditional sequencing (18%), hand-crafted emails (17%) and ops-managed platforms (15%), remain in heavy use.

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AI Transformation

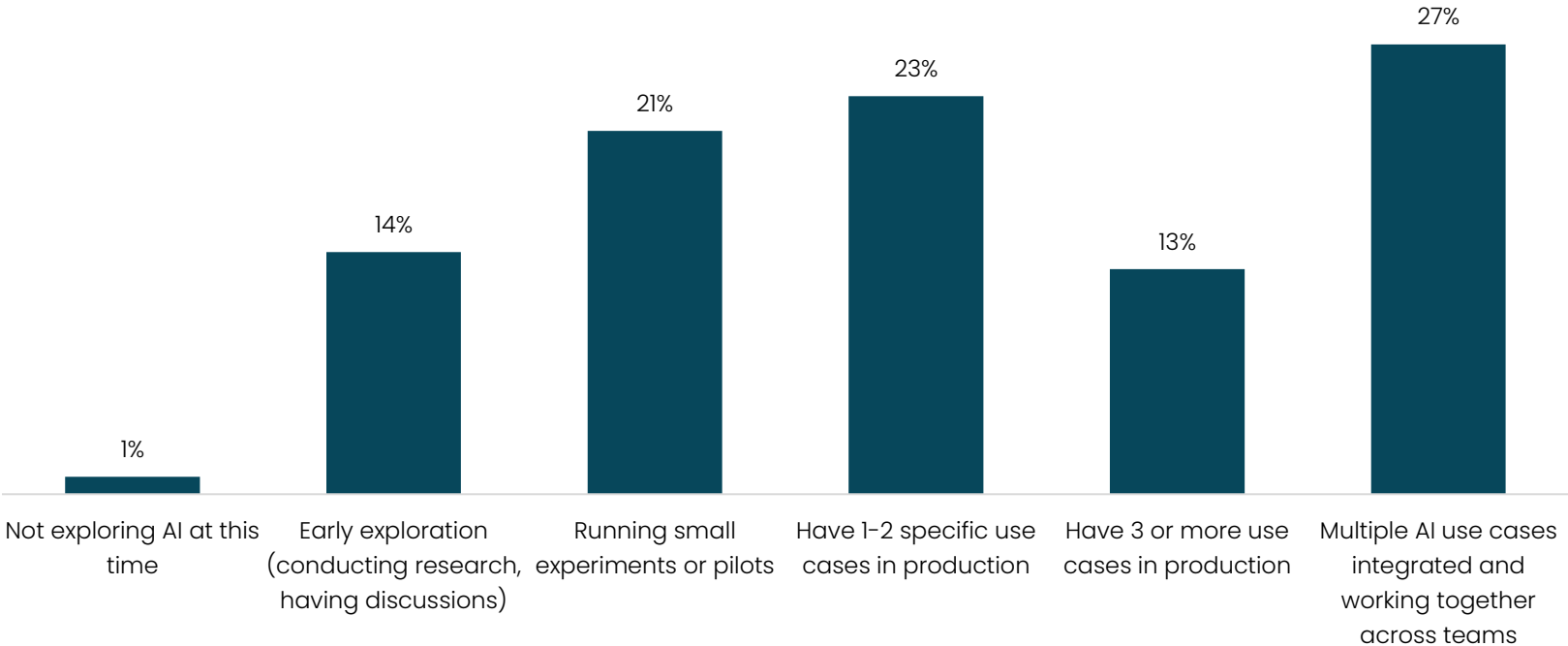
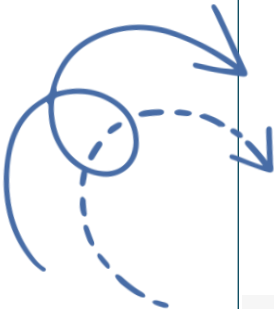
AI Adoption in Marketing Organizations



AI adoption maturity in marketing organizations



Where is your organization today in its adoption of AI for marketing use cases?



Broad adoption:
99% are exploring or using AI in some form for marketing.

Growing maturity:
Almost 60% have pilots or use case(s) in production, with another 27% already integrating multiple AI applications across teams.

Faster progress in marketing:
Marketing shows greater AI advancement than sales, with 40% having 3+ use cases or integrated use cases, compared to 22% in sales.

Top AI use cases driving marketing impact



Which AI-enabled use cases have delivered the most impact for your Marketing organization?

(Select up to 3)



Content is the clear AI stronghold:

Nearly 9 in 10 leaders report impact across copy (78%), search (43%), creative assets (41%), brand voice (39%), or digital asset management (15%).

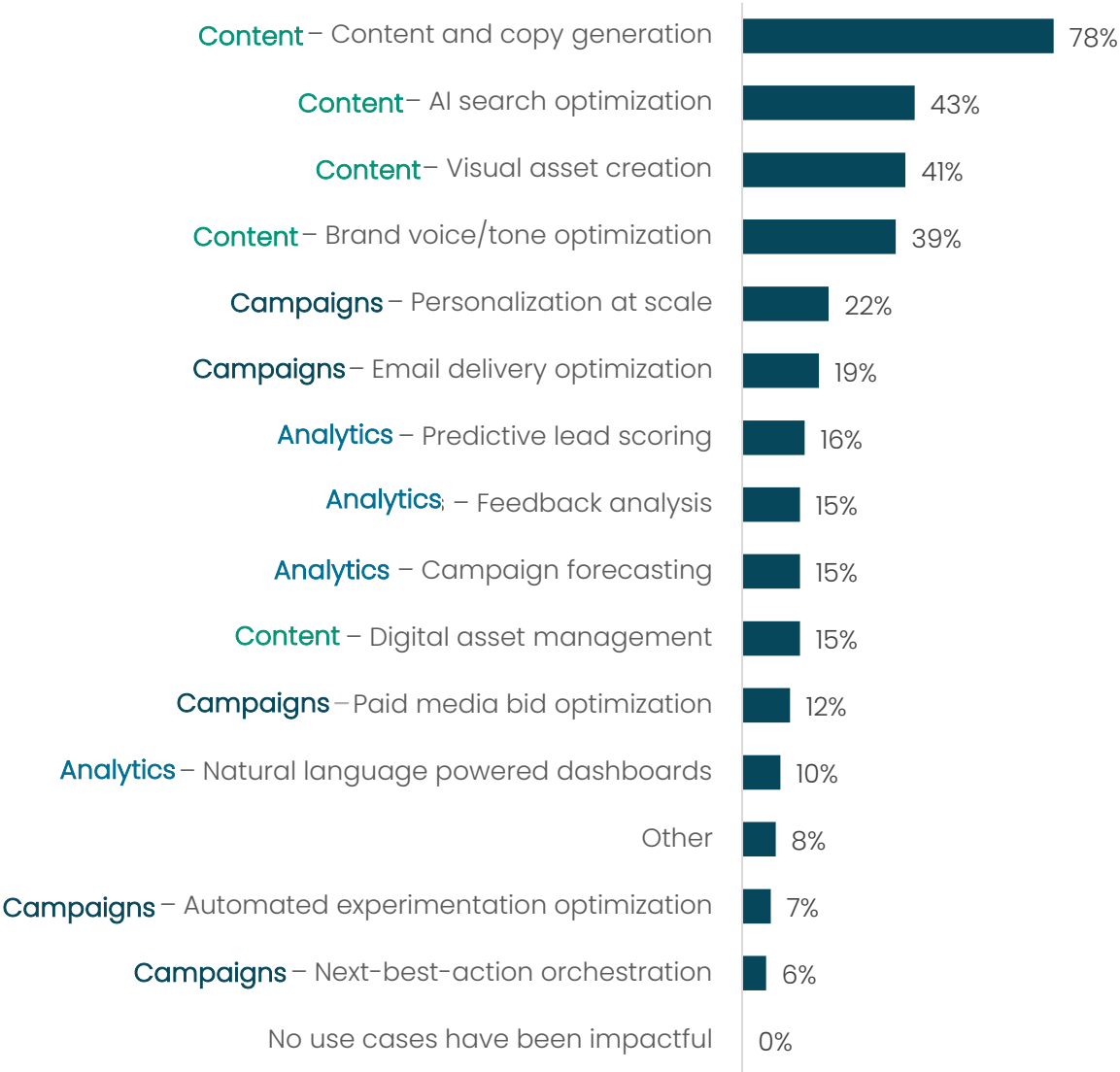
When looking at those with more AI usage (3+ use cases or integrated use cases), content continues to lead suggesting that this is where AI efforts have been focused to-date as companies embark on their AI journey.

Campaign optimization and analytics trail:

Most of these use cases fall in the 15–22% range, showing more modest traction.

Next-best-action orchestration and experimentation are niche:

Adoption is under 10%, suggesting future opportunity but limited traction today.

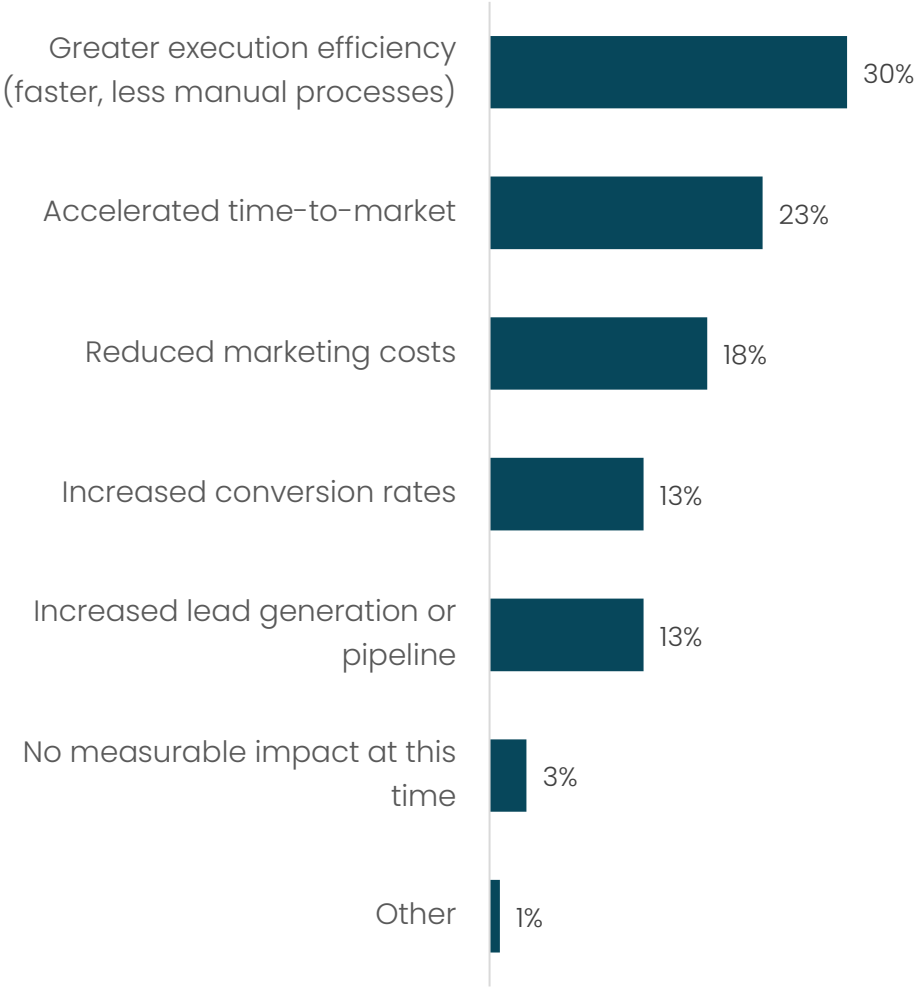
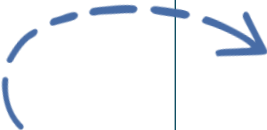


Observed impact from implementing AI use cases

Q

What impact has your organization experienced as a result of implementing AI-enabled use cases?

Please select all that apply for each use case.



AI delivers efficiency gains now, with revenue impact still limited.

Efficiency ROI is strongest:

30% cite faster execution, less manual work.

Speed-to-market improves:

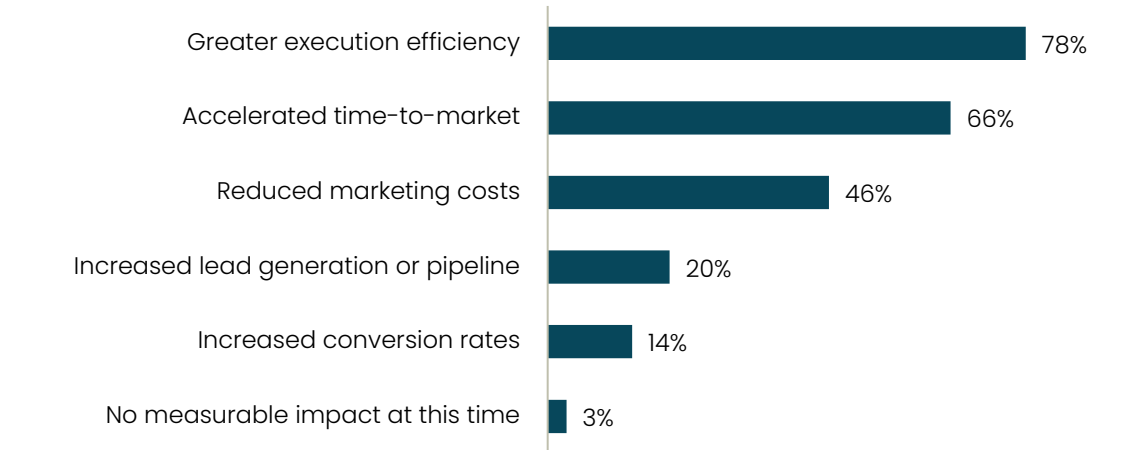
23% report accelerated delivery of campaigns and programs.

Cost savings before revenue:

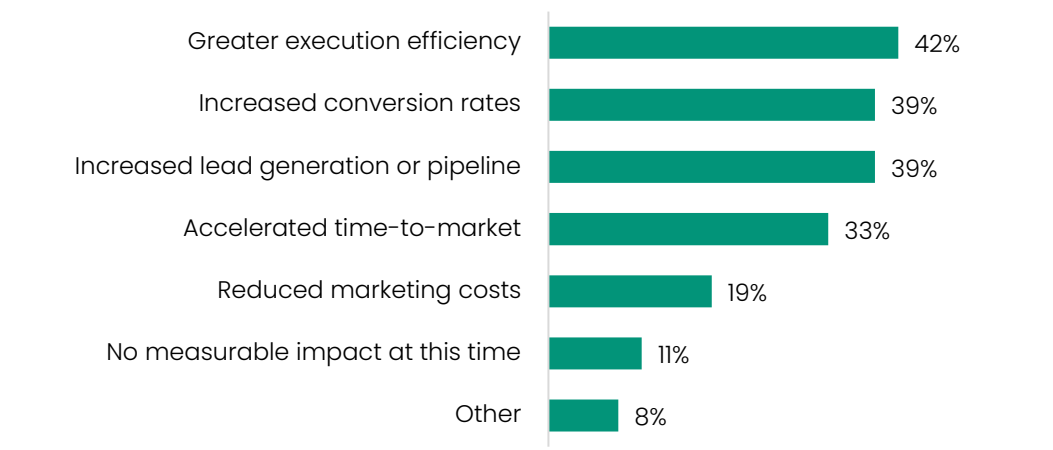
18% report reduced costs vs. 13% seeing conversion lift.

Observed **impact** from implementing **top AI use cases**

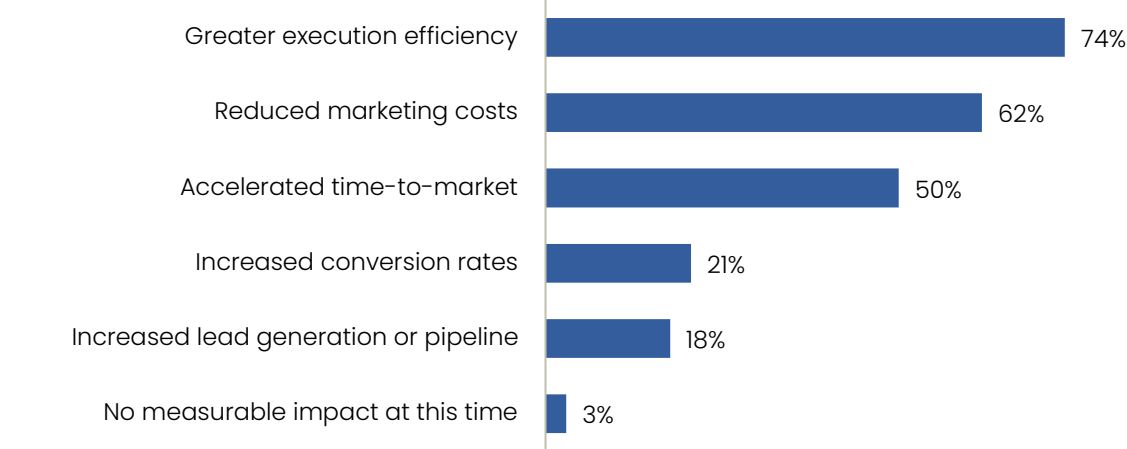
#1 Use Case – Content and Copy Generation



#2 Use Case – AI Search Optimization



#3 Use Case – Visual Asset Creation



AI in content & copy generation and visual asset creation drives efficiency and cost savings, while AI in search optimization delivers conversion lift.

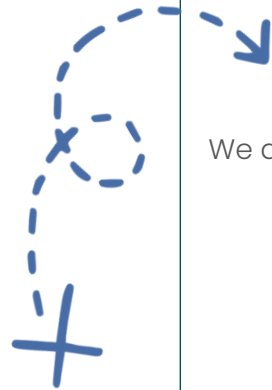
- **Content & copy generation:**
78% efficiency, 66% faster time-to-market, 46% lower costs
- **Visual asset creation:**
74% efficiency, 62% cost savings, 50% accelerated time-to-market
- **Search optimization:**
42% efficiency, 39% higher conversions and pipeline

Barriers to AI adoption in marketing

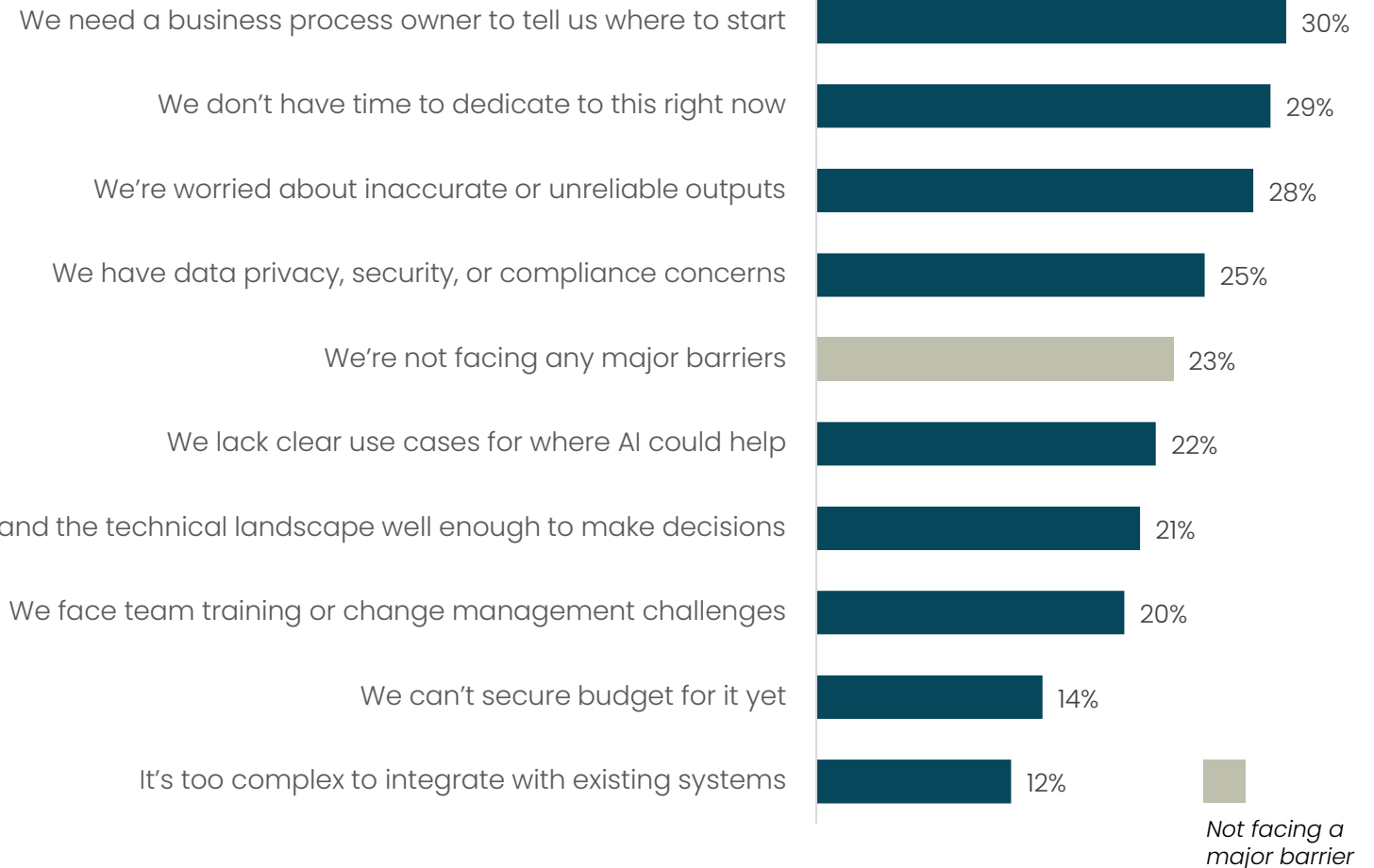


What's getting in the way of your organization making more progress with adopting AI for Marketing?

Select all that apply. (Included top 10)



AI adoption stalls because of **unclear ownership, time constraints, and trust concerns**. Executives must address leadership and governance gaps more than technology hurdles.



How marketing teams are implementing AI



If your organization has deployed AI for Marketing use cases, how were they implemented?

(Select all that apply)

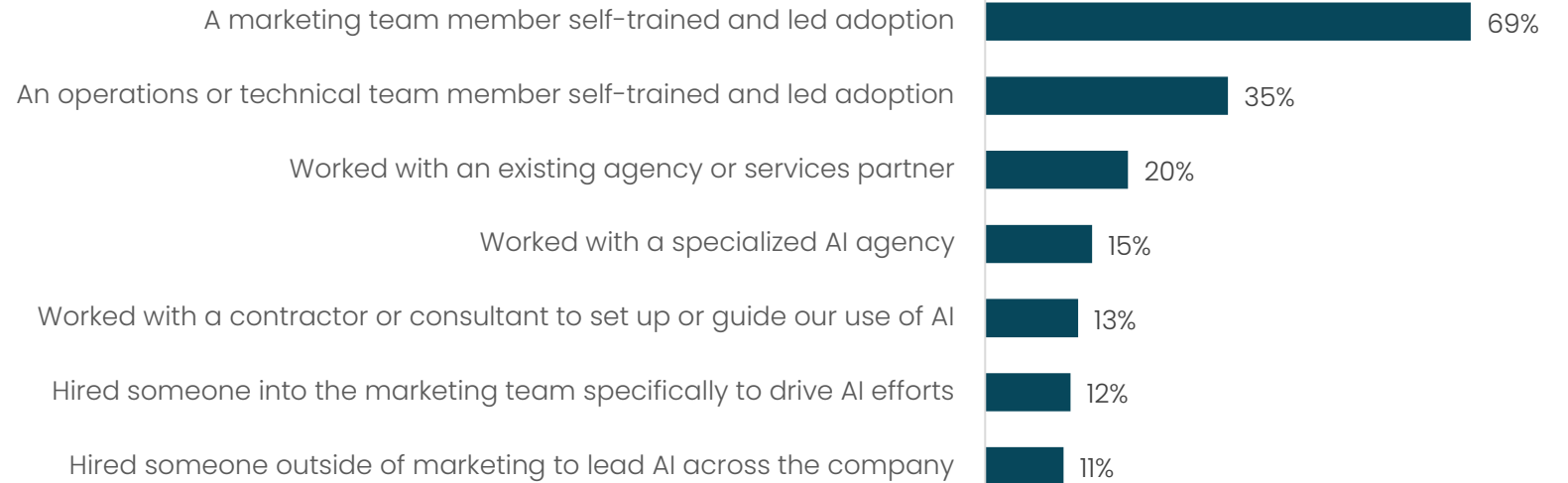


Internal-first adoption:

In-house implementation dominates, with 69% indicating marketing has self-trained and led efforts and 35% indicating that ops/technical team member has self-trained and led efforts. Over half (55%) of respondents only selected internal-led approaches, reinforcing that AI implementation is often self-driven.

Varied external support:

Still, 45% unique respondents reported using at least one external partner, most often existing agencies (20%),



followed by specialized AI firms (15%) and consultants (13%).

Few dedicated hires:

Just 12% added AI-focused marketing roles and 11% hired outside of marketing, signaling AI is treated as skill enhancement rather than a standalone function.

Risk of stagnation:

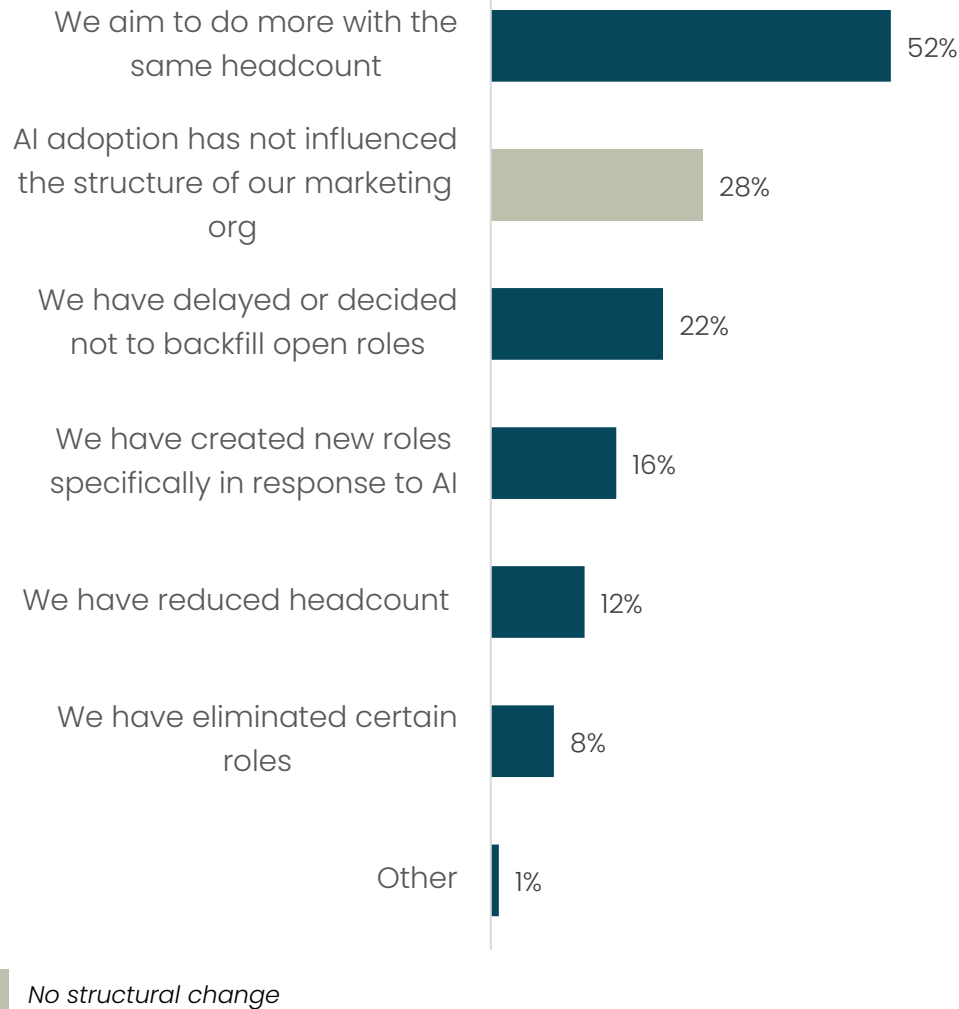
Marketers should consider that without focused expertise, there may be increased risk of slower adoption, limited success from adoption, and/or missed opportunities to fully operationalize AI.

The impact of AI on marketing team structures



How has rising AI adoption influenced the structure of your marketing organization?

(Select all that apply)



Efficiency first:

Over half (52%) are using AI to do more with the same headcount.

Selective growth:

Just 16% have created new AI-driven roles, while 28% report no structural impact.

Structural change emerging:

While 28% said AI has not influenced their marketing org structure, 42% of selections indicated signs of structural impact, including delayed backfills (22%), reduced headcount (12%), and role eliminations (8%).

Looking ahead:

Early structural signals suggest AI's impact is moving beyond experimentation to workforce design. Leaders must balance driving efficiency through AI while focusing human effort on high-value tasks.

Expected impact of AI on marketing team reductions



Looking ahead to the next 3 years, what percentage of marketing workforce reductions might you expect to be influenced by AI?

Level of AI Adoption	Anticipated Workforce Reductions
Multiple AI use cases integrated across teams	36%
Have 3 or more use cases in production	27%
Have 1-2 specific use cases in production	29%
Running small experiments or pilots	27%
Early exploration	26%
Not exploring AI at this time	4%

29%

Average estimated marketing workforce reductions expected to be influenced by AI in the next 3 years.



AI expected to reshape workforces:

Most organizations anticipate at least a quarter of workforce reductions will be influenced by AI in the next three years.

Anticipated impact grows with AI maturity:

Organizations integrating multiple AI use cases across teams expect greater AI-influenced workforce reductions.

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Appendix

2025 B2B Sales & Marketing
Benchmark Survey

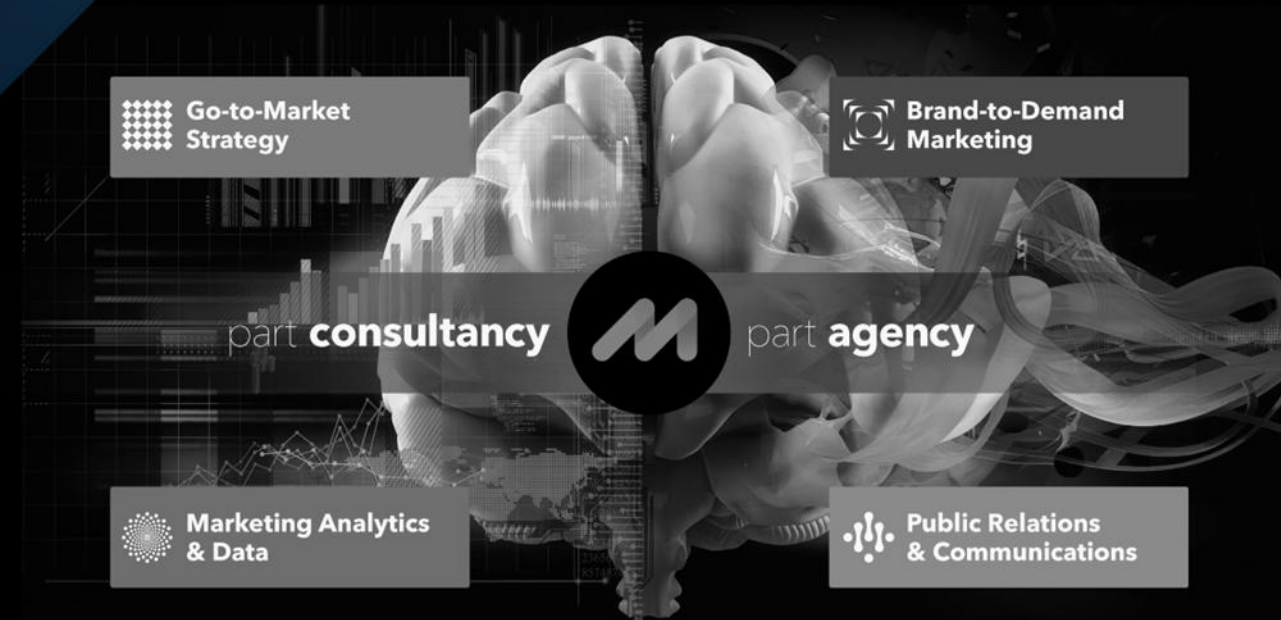


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Key
industries



Disclosures

- The data in this report was collected from 77 Norwest portfolio company revenue leaders and an additional 100 revenue leaders from VC- and PE-backed B2B companies between July 21 to August 19, 2025. The survey was conducted by Dynata, a third-party full-service market research company. The data collected represents a total of 177 responses from sales and marketing leaders through these combined sources.
- Rapidly changing market conditions should be considered when reviewing this benchmarking data. This report is intended to be point of reference and should not be taken as a recommended course of action or legal advice.
- References to “companies” refers to the companies represented by the revenue leaders who were surveyed through the 2025 Norwest Sales & Marketing Benchmark Survey.
- Throughout this report, there may be references to statistically significant differences. This means that an observed difference has been mathematically determined to be an actual difference that did not occur due to random fluctuations in the data. Statistical testing was done at a 95% confidence level which means that there is at least a 95% probability that the difference did not occur due to chance.

Thank You

Questions about the survey or the results?
Please email Renée Cohen | rcohen@nvp.com