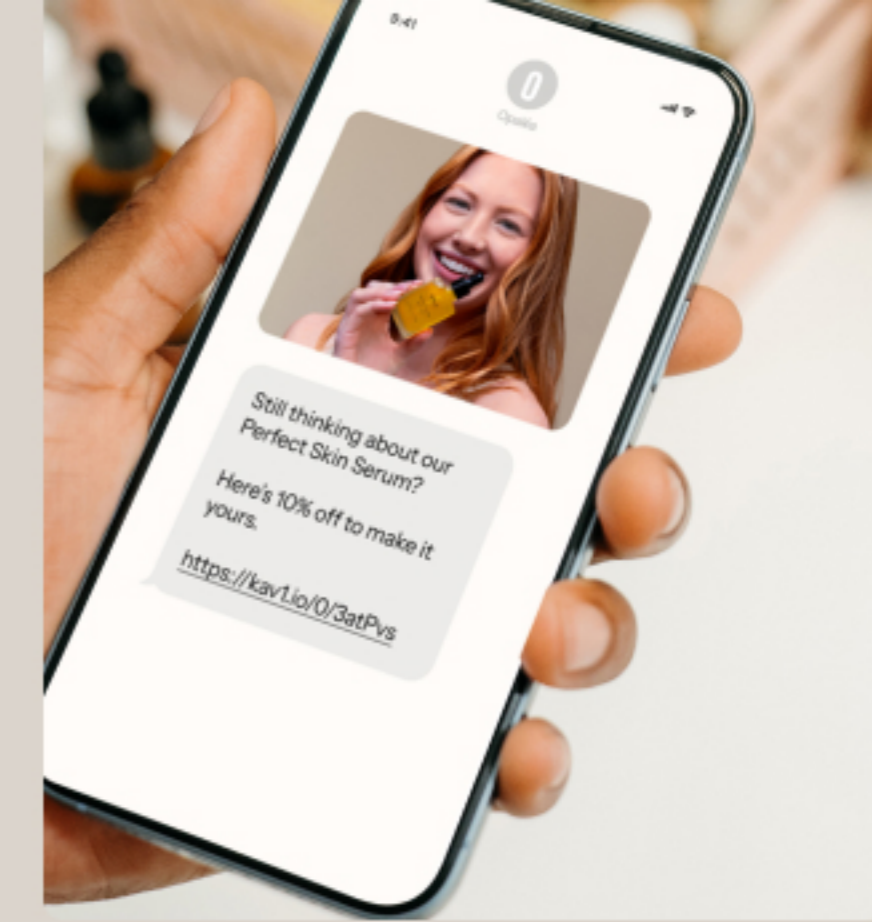




2025 state of B2C marketing

How leading brands are responding to margin pressure, economic volatility, and sky-high customer expectations



Explore the report

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Marketing today isn't just moving faster—it's evolving

And in a time when budgets are tight, resources are stretched, and uncertainty is the norm, that shift can feel even more intense. But here's what we've seen: the brands leading the way aren't doing more. They're doing it differently.

They're embracing AI to move with speed and precision. They're using real-time data to personalize experiences, not just messages. And they're connecting marketing, service, and analytics to create a seamless journey—from the first interaction to long-term loyalty.

In this report, we take a close look at how the most successful brands are navigating this change. We found that marketers at high-performing companies are thinking beyond acquisition and prioritizing lifetime value. They're building trust. They're aligning with customer service. And they're using feedback and insight to improve every part of the experience.

This isn't about working harder. It's about working smarter—with the right tools, the right strategy, and a deep understanding of your customer.

Because in a world where expectations are high and stability is never guaranteed, success doesn't come from doing everything. It comes from doing the right things—faster, together, and with purpose.

—Jamie Domenici, CMO, Klaviyo



The new B2C marketing landscape

The new reality: brands must do more with less—while personalizing at scale and competing on experience.



How the most successful B2C brands are navigating economic pressures and evolving expectations

In 2025, economic uncertainty isn't the exception—it's the operating environment. From rising tariffs and inflation to channel fragmentation and stricter privacy laws, B2C marketers face unprecedented pressure to do more with less: **drive growth, prove ROI fast, retain customers, and meet customer expectations.**

While some brands struggle, many are thriving—especially those with full alignment across marketing and customer service. Our research shows that these brands are 156% more likely to significantly exceed their marketing goals.

So what sets them apart? To understand current B2C marketing challenges, consumer expectations, and opportunities, Klaviyo surveyed 1,500+ global marketers in March 2025. In this report, we review the insights, takeaways, and ways leading brands are getting ahead.



Key findings



Consumer journey

Brands are embracing cross-channel journeys, but many struggle to unify data.

Modern customer journeys defy straight lines—they start, pause, and resume across different platforms, and they demand real-time orchestration.



Marketing & customer service alignment

High-performing brands align marketing and customer service functions to drive higher growth.

Many brands cite poor alignment between marketing, sales, and customer service as the reason they lack a unified customer view.



Tech & data

Many brands work with too many fragmented tools, while top performers invest in unified platforms.

AI and CRM adoption is on the rise, but many brands lack the integrated data infrastructure to leverage their full capabilities.



Metrics & growth

Focus on retention is low, with many brands still prioritizing acquisition and ROI over loyalty.

Marketers are much more likely to use engagement as a KPI than customer lifetime value (CLV).

The moment we're in: shrinking margins, slower growth, and higher expectations

Costs are rising. Customer behavior and expectations are shifting. And the margin for error is razor thin. Marketers need every dollar to deliver long-term value.



Market and operational pressures

Economic volatility, rising CACs, and shifting consumer behavior have made it harder—and more expensive—to grow.

Traditional marketing tactics are falling short in an environment defined by tighter budgets and customers who are more value-conscious.

Our survey found that almost three-quarters of B2C marketers say CACs are increasing. No surprise, when margins are shrinking as [tariffs and fulfillment costs climb](#). Global privacy regulations are making acquisition harder, and recession signals are pushing consumer spend toward essentials and long-term value.

At the same time, marketing teams are using more tools than ever and are under pressure to improve repeatable ROI.

73%

of B2C marketers report rising CACs

14%

of marketers say retention is their top goal

Most marketers are working with bloated tech stacks that limit their view of the customer and diminish ROI

Most marketing teams use 6–15 marketing tools. Even businesses with over \$100 million in annual recurring revenue (ARR) still rely on 11–15 tools to manage their marketing strategies.

Less than 20% of organizations of all sizes have 5 or fewer tools in their marketing tech stack.

60%

of marketing teams have 6–15 tools in their marketing stacks.

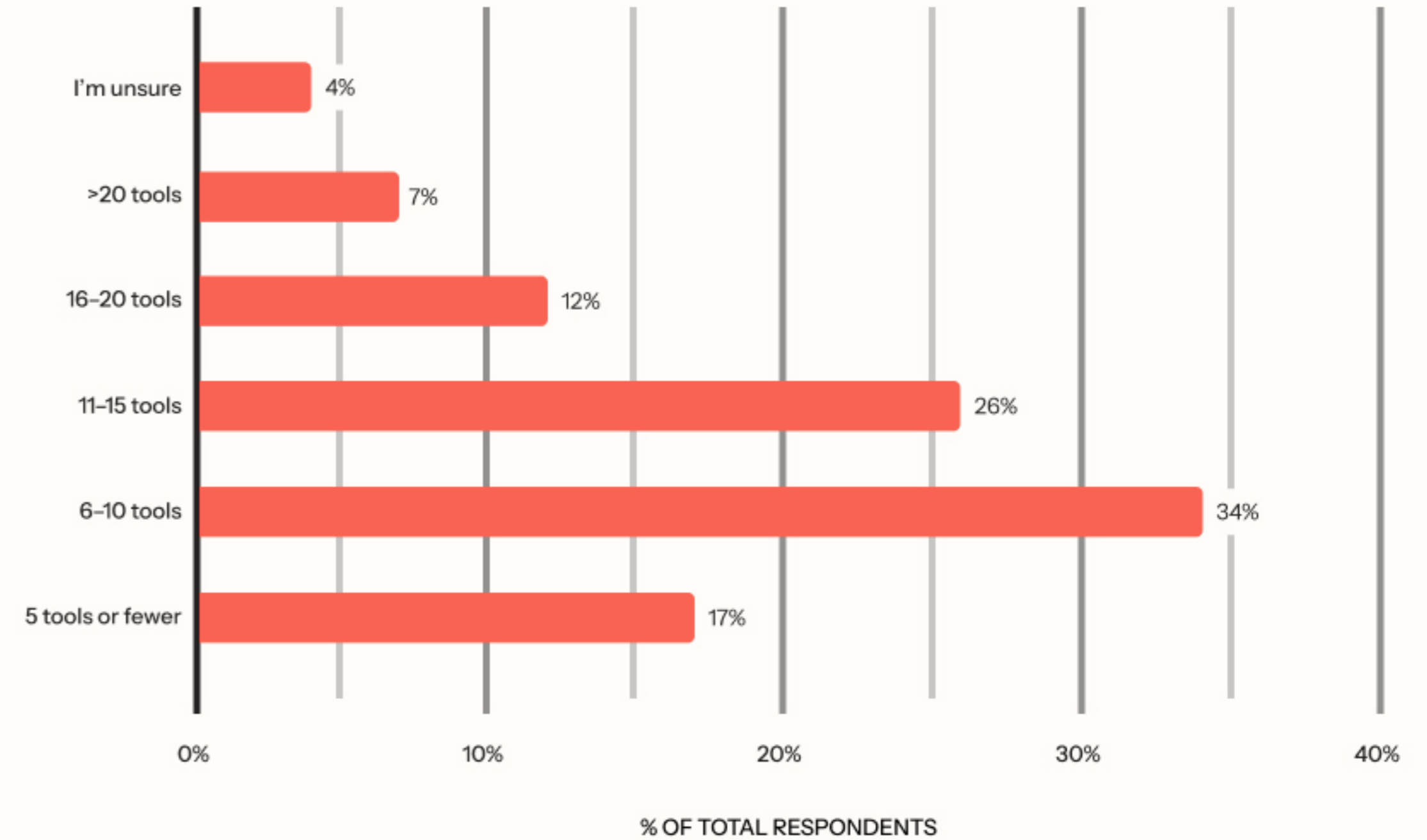
18%

cite cross-team collaboration challenges as the top barrier to a unified customer view.

14%

point to data silos as the No. 1 barrier to real-time customer views.

Q13. Which of the following best describes how many tools make up your current marketing tech stack? (select one)



Marketing challenges are centered around data and tech stacks

With such complex tech stacks, it's no surprise that almost a fifth of organizations cite collaboration challenges across marketing, sales, and customer service as the main barrier to gaining a full view of the customer.

This is compounded by privacy regulations that limit tracking and retargeting, making traditional acquisition plays more expensive.

Q26. Which of the following best describes your company's biggest challenge in achieving a comprehensive, real-time view of your customers (select one)



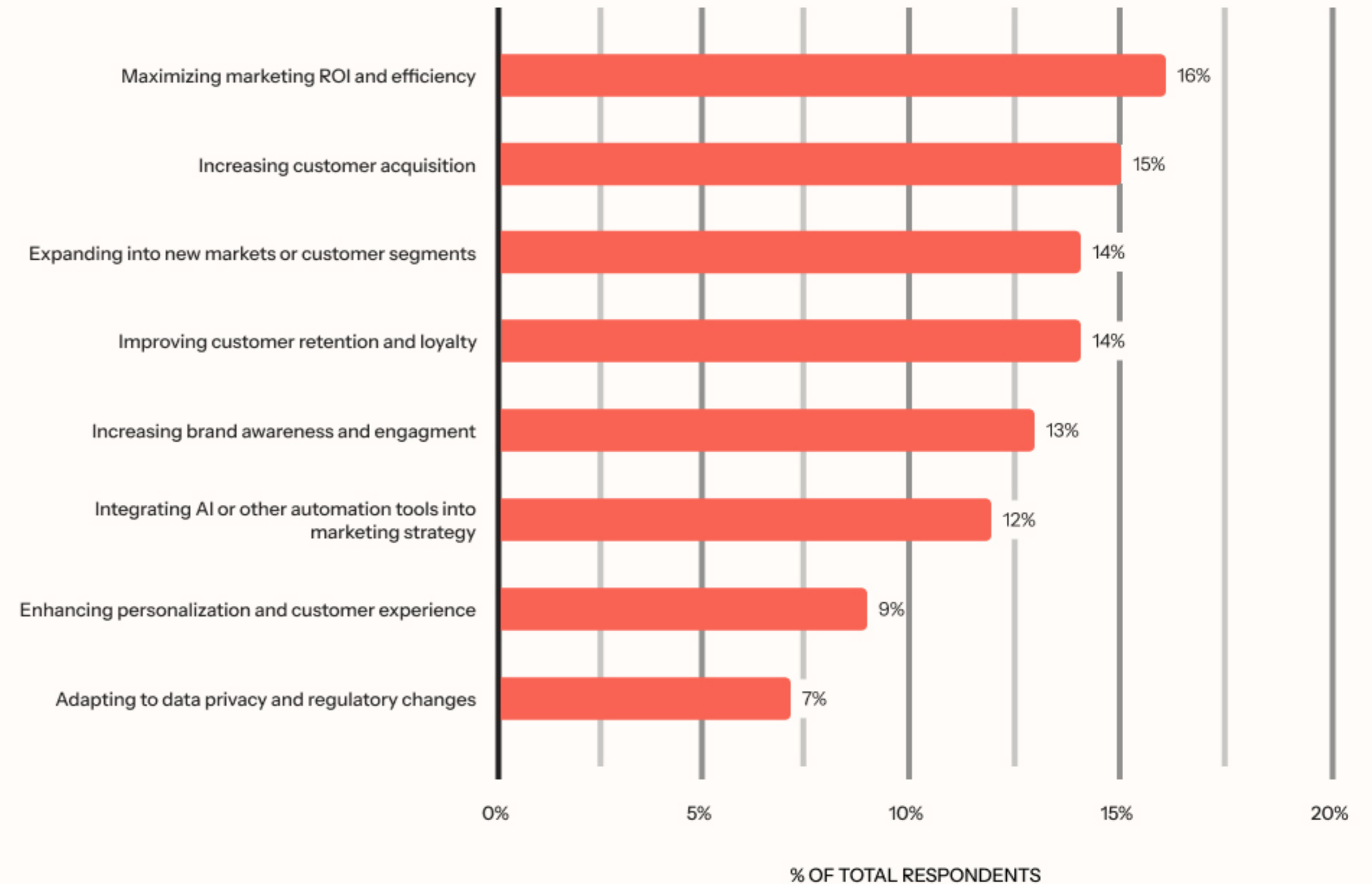
Marketing directors and execs are aligned on prioritizing ROI—but not on exactly how to achieve it

Across B2C marketing teams, respondents are prioritizing ROI, efficiency, acquisition, and market expansion in 2025. But when we break priorities down by role, two different stories emerge. While both marketing directors and executives are both focusing on growth, they differ in how they envision getting there.

Marketing directors and managers are most likely to emphasize **customer acquisition—a strong signal of focusing on the top of the funnel**. They’re thinking about brand reach, operational streamlining, and long-term positioning in new markets.

Marketing executives, meanwhile, are more likely to prioritize **maximizing ROI and efficiency—a much more middle-of-the-funnel approach**, thinking more about existing customers and processes.

Q28. Which of the following marketing goals is your company’s biggest priority in 2025? (select one)



Marketers are undervaluing the customer experience

Marketers are doubling down on ROI, but overlooking one of its biggest drivers: the customer experience.

Marketers are undervaluing the customer experience, even though they acknowledge its importance. While customer experience and brand are stronger together, most marketers still aren't prioritizing the connection.

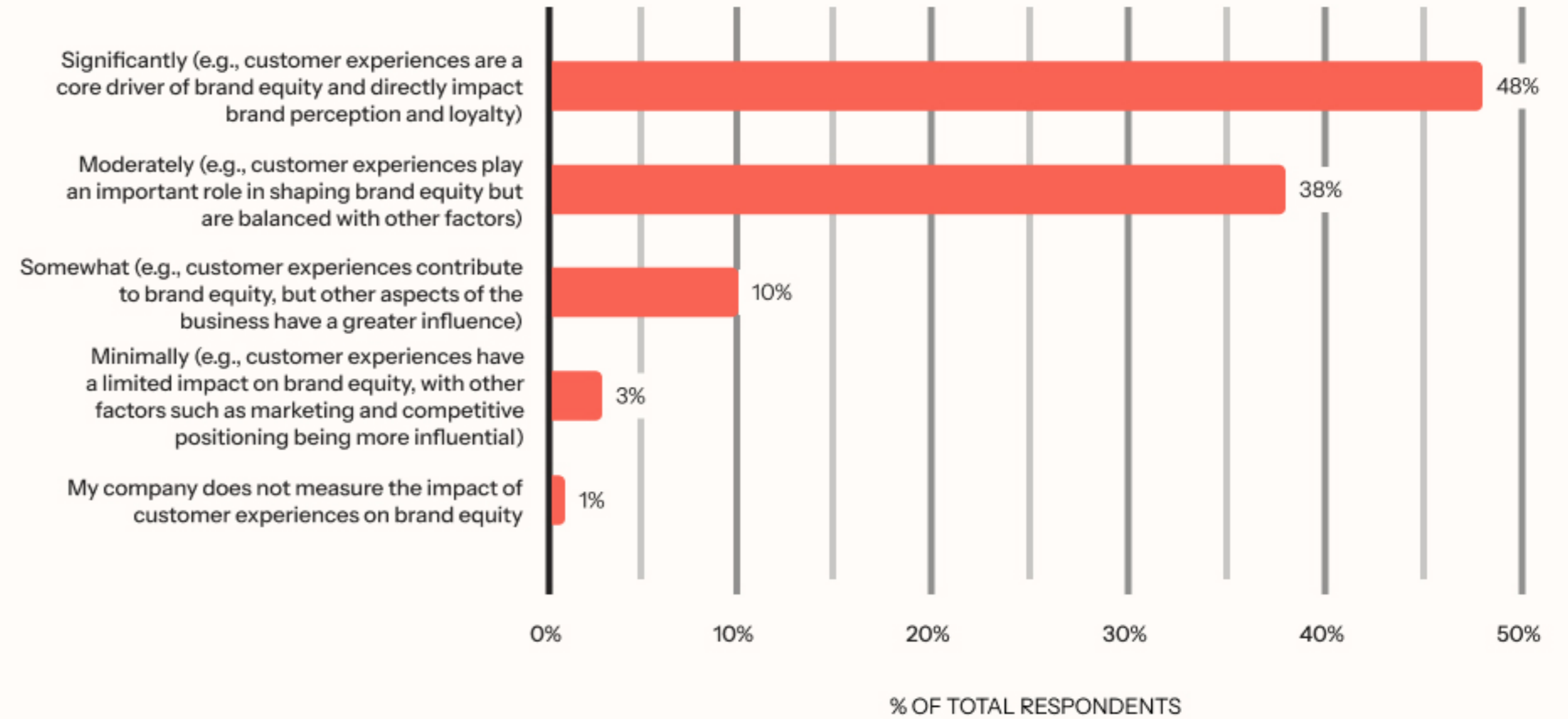
99%

of marketers acknowledge the customer experience impacts brand equity, but only 48% consider the impact significant.

Only 9%

of marketers say improving the customer experience is a top priority.

Q21. To what extent do customer experiences contribute to your company's overall brand equity? (select one)



Takeaways for brands

Acquiring new customers is expensive. Retaining existing ones delivers long-term value.

Rising acquisition costs, tighter margins, complex tech stacks, and more price-conscious consumers make sustainable growth a huge challenge. In this environment, customer acquisition takes more effort, and brands chasing growth without retention guardrails are trading short-term gains for risks to their long-term margins.

In other words: brands are wasting money on customer acquisition if they don't have the means to retain them.

To drive ROI in 2025, leaders need to consolidate tools, align teams around unified data, and prioritize the customer experience as a path to profit.



Goals, gaps, and growth metrics

There's a growing disconnect between the metrics marketers track and those that drive sustainable growth. But there's an opportunity to refocus on what really moves the needle—retention and CLV.



Marketers' goals are focused on acquisition, efficiency, expansion, and ROI

Most B2C marketers still measure success by engagement, not lifetime value—and it's costing them

Across the board, only 14% of marketers say retention is their top goal, while there's a big emphasis on acquisition, efficiency, expansion, and ROI—regardless of ARR.

To the right are the top 2025 marketing goals broken down by ARR:

<\$30M ARR

Customer acquisition: 20%

\$30M-\$100M

Maximizing ROI and efficiency: 17%

>\$100M ARR

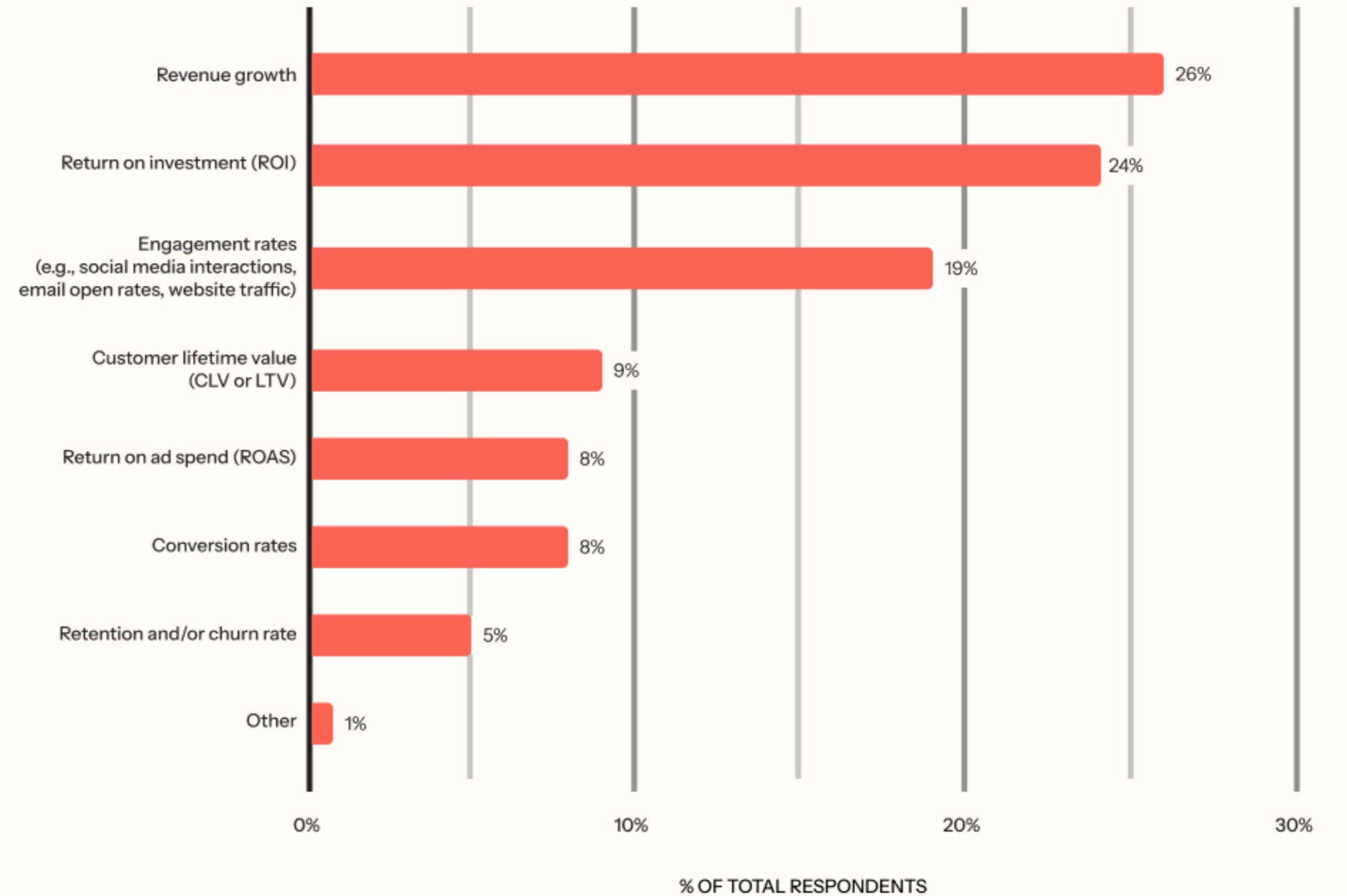
Maximizing ROI and efficiency: 18%

Most B2C marketers still measure success by engagement, not lifetime value—and it’s costing them

Marketers are 111% more likely to use engagement as a KPI than CLV. Meanwhile, only 5% of marketers measure retention or churn rates as a primary KPI, and just 9% focus on CLV as a primary KPI.

This suggests that they’re focusing on volume—clicks and open rates—over long-term value like retention and loyalty.

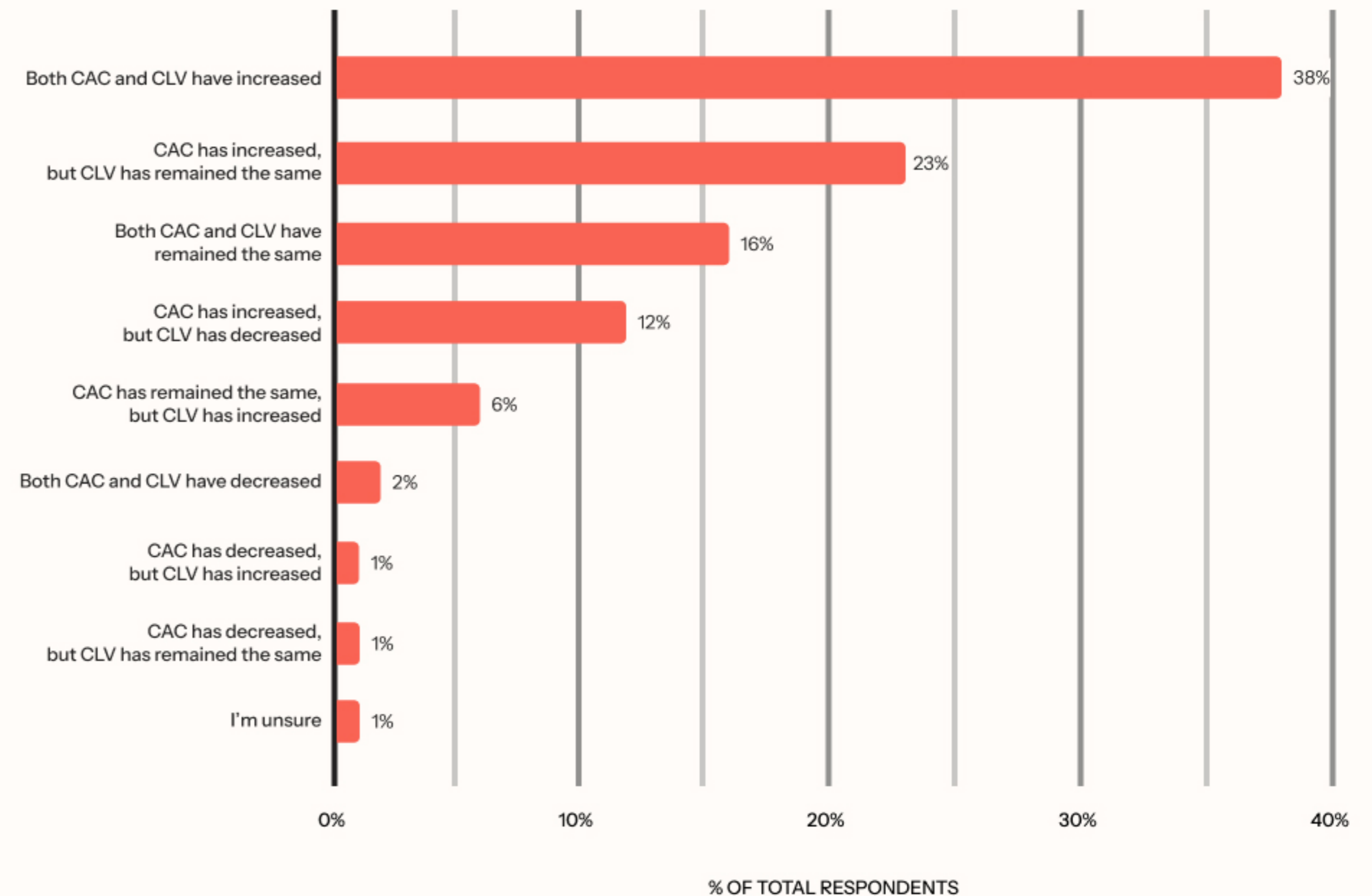
Q6. Which of the following key performance indicators (KPIs) does your company primarily use to measure marketing success?



CACs and CLV are both on the rise—what does this mean for brands?

This matters because almost 40% of brands have seen increases in both CACs and CLV over the past year. That means that even if they're acquiring higher-value customers, rising CACs can cancel out CLV gains. If the cost to acquire customers is increasing faster than their lifetime value, then margins may still be decreasing—even if overall revenue is growing.

Q12. Which of the following best describes how your company's average customer acquisition costs (CAC) and average customer lifetime value (CLV) have changed over the past year? (select one)



Focusing on engagement leads brands to underinvest in their best customers

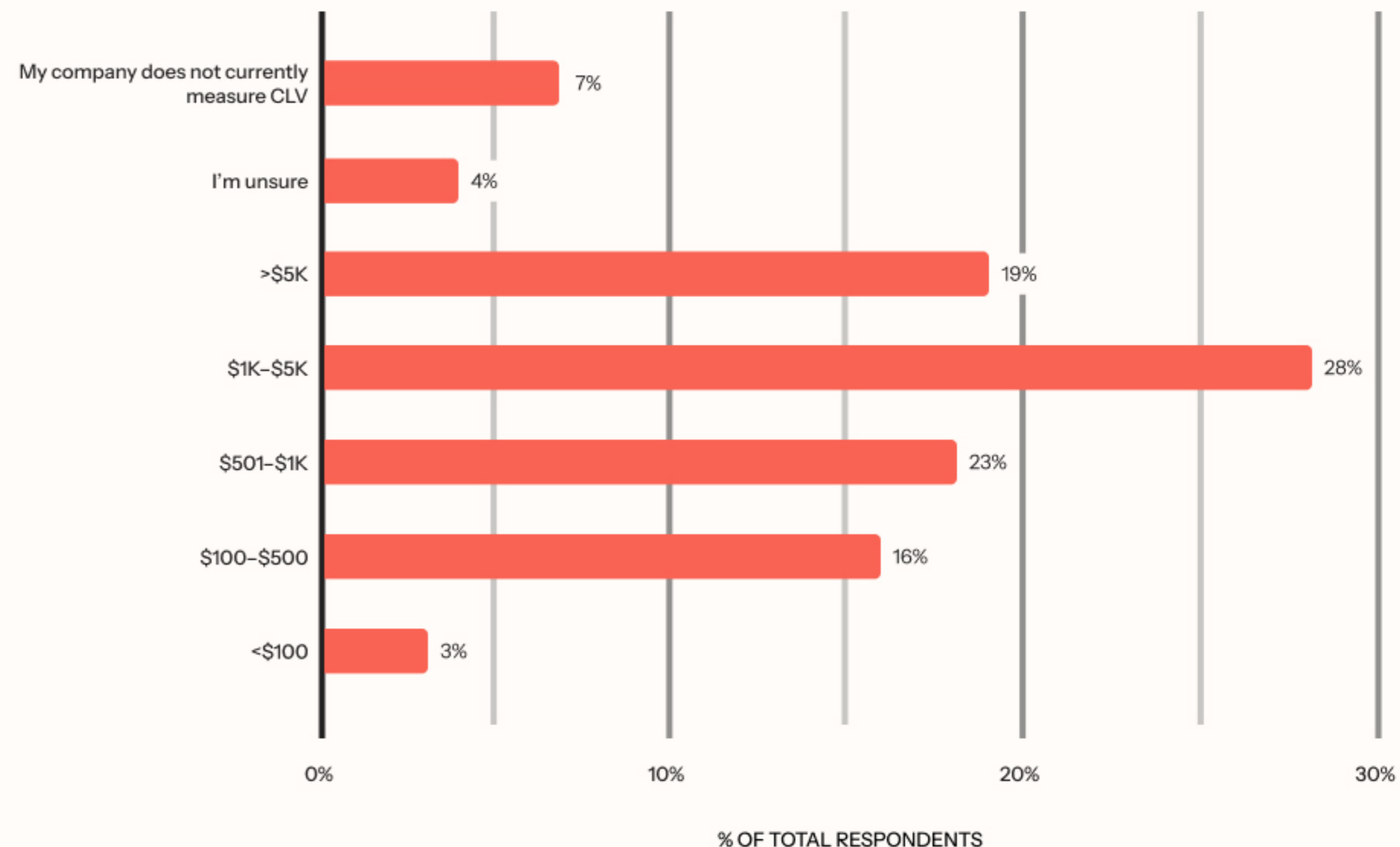
Less than 10% of marketers use CLV as a primary KPI. But almost half of them report average CLV greater than \$1,000, and almost 30% report CLV in the \$1,000–\$5,000 range.

Brands that aren't prioritizing CLV as a KPI are defaulting to surface-level goals like clicks or new leads. Ultimately, this could drive spend toward acquisition channels that deliver the most conversions at the lowest cost—but not necessarily the highest lifetime revenue.

There's a clear contradiction between marketing teams' budget allocations for retention and their focus on acquisition metrics. This suggests that while brands are indeed allocating resources to retaining customers, they still measure **success based on acquisition-centric metrics.**

This misalignment can lead to under-resourcing or poor optimization of retention initiatives. The overemphasis on acquisition forces teams to juggle short-term wins and long-term value, leaving high-value customers underserved.

Q11. Which of the following best describes your company's average customer lifetime value (CLV)? (select one)



How DKNY pairs retention with engagement

Fashion brand DKNY's strategy proves that focusing on CLV leads to real results



METRICS

What they did

DKNY faced low engagement and revenue attribution from their huge email list. They cut down on email volume and personalized their approach: targeting based on average order value (AOV) and personalizing product recommendations.

How they did it

Using [Klaviyo flows](#) and [AI-powered automation](#), DKNY focused on [targeted segmentation](#) and timely messaging to boost email efficiency, engagement, and CLV.

Results

- 30% of Klaviyo-attributed value from flows in the past 3 months
- 24% YoY reduction in total email sends
- 8% YoY increase in click rate

[Read the case study](#)



Takeaways for brands

Retention powers sustainable growth. In a cost-pressured market, focusing on existing customers—through loyalty, personalization, and CLV-focused tactics—can deliver higher ROI and steadier revenue than constant acquisition.



Channels and customer journeys look different—and the old marketing playbook no longer works

Yes, classic tactics can still move the needle. But the rules have changed. One-size-fits-all campaigns are losing steam. Today's buyers demand a seamless, personalized experience that caters to every touchpoint.



The traditional marketing playbook is showing its age

Brands are realizing that success depends on an integrated, customer-first approach—one that prioritizes cohesive experiences and personalization across every touchpoint.

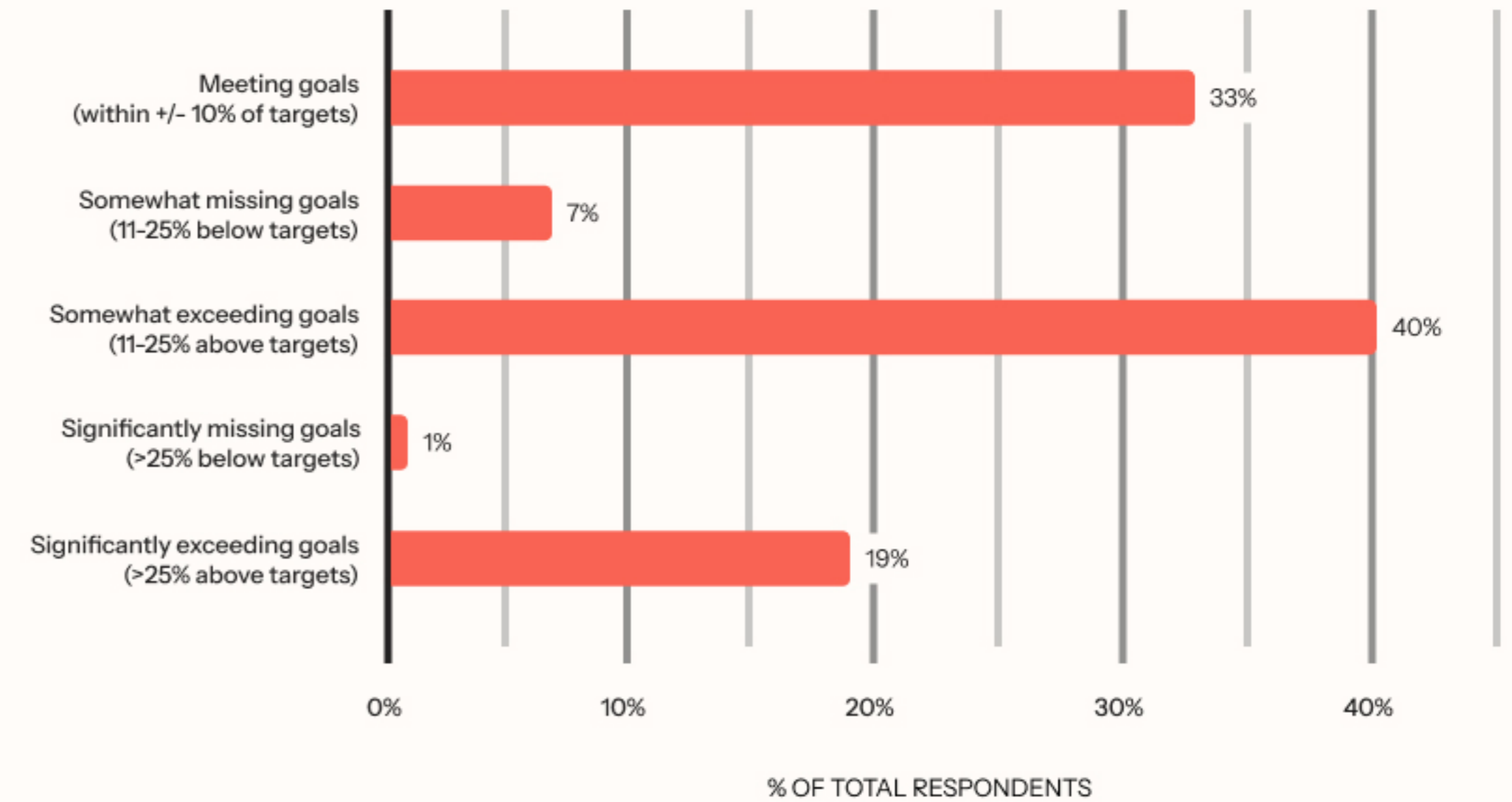
59% of B2C marketers are surpassing their goals, even amid market and operational challenges.

Yet, the traditional marketing approach—paid acquisition, static campaigns, and siloed systems—is becoming harder to maintain and puts long-term results at risk.

This shift is driven by several key factors:

- On their own, paid channels are underperforming. Only 11% of respondents said that paid social ads provide the greatest ROI for their company—they’re no longer the reliable revenue drivers they once were.
- Privacy regulations have made targeting more difficult and traditional strategies less effective.
- Customer journeys are more dynamic—they move fluidly between TikTok, WhatsApp, in-store, and beyond. Consumers expect a seamless, personalized experience across touchpoints.

Q7. Which of the following best describes your marketing team’s performance over the past year? (select one)

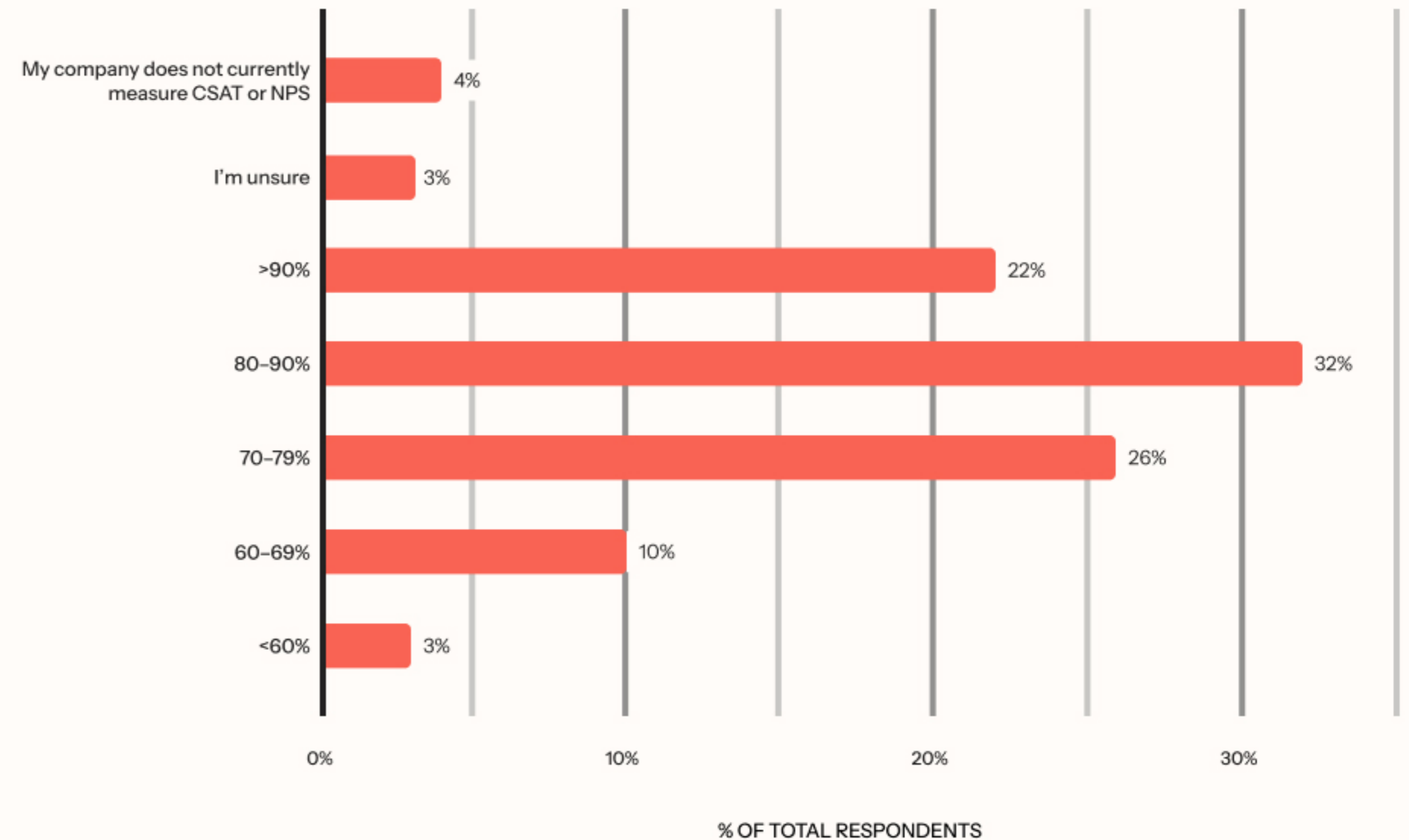


Top-performing brands are putting customer experience and satisfaction front and center

Remember, although 99% of marketers say customer experience fuels brand equity, fewer than half say customer experience significantly contributes to equity. But among the companies over-exceeding marketing goals, 70% say customer experience significantly impacts brand equity.

When we asked which customer service metrics they track for marketing performance, 55% of marketers reported using CSAT, while only 32% said they track resolution time—suggesting a stronger focus on emotional outcomes than operational efficiency.

Q9. Which of the following best describes your company's average customer satisfaction (CSAT) or net promoter score (NPS)? (select one)

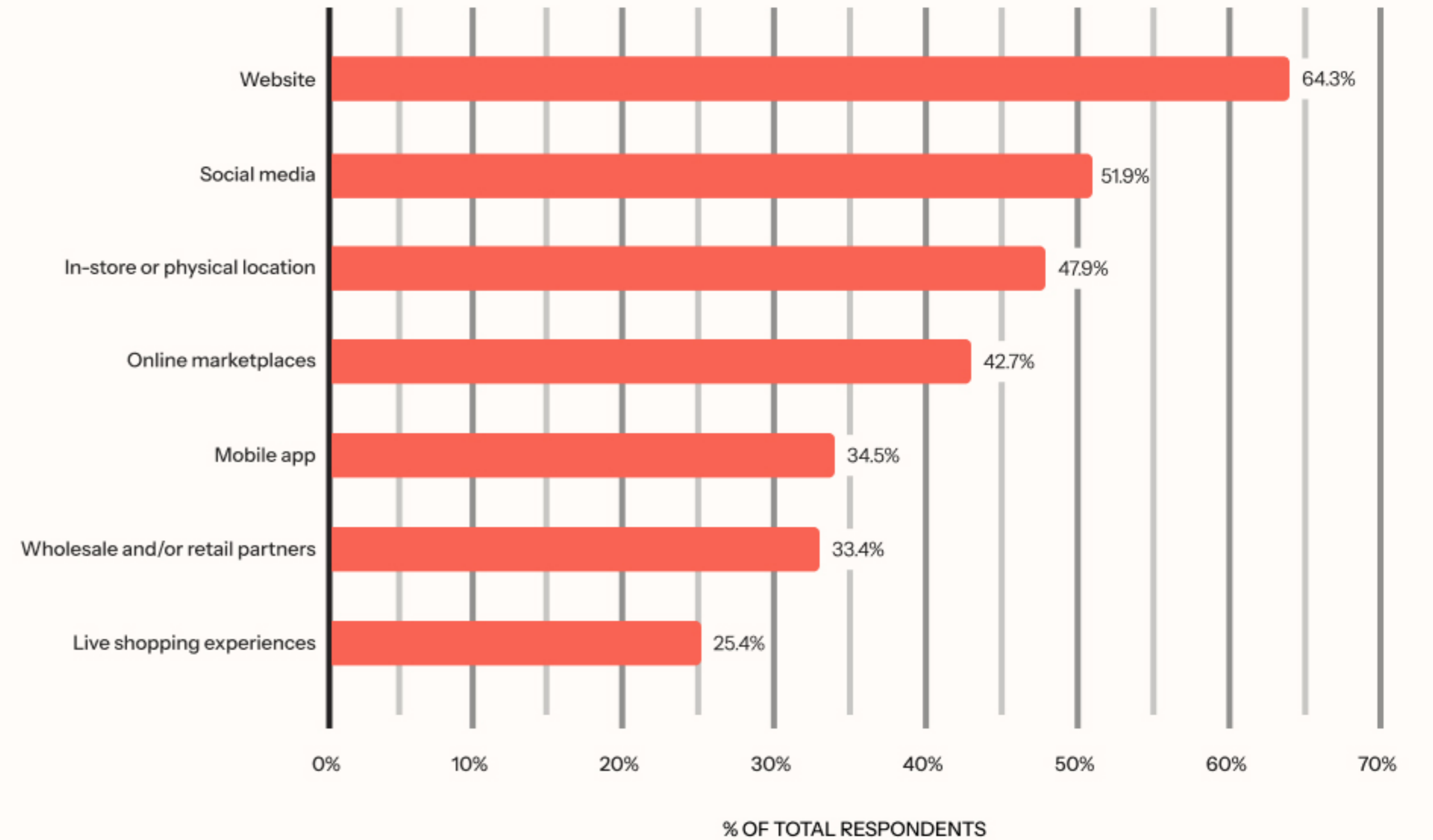


Customer journeys and channel preferences have changed

The days of single-channel strategies are over. 64% of survey respondents say their website is one of their top 3 sales channels, with social media (52%) and in-store or physical location (48%) close behind. But presence alone isn't enough.

Today's consumers not only shop across channels, they also expect instant answers: 81% expect brands to respond within 24 hours of reaching out to customer service, according to Klaviyo's [future of consumer marketing report](#). Delivering on that requires true omnichannel fluency—brands that don't meet customers across channels with a unified experience risk falling behind.

Q8. Please rank your company's top [up to] 3 sales channels, as measured by total revenue generated (1 = top-performing channel, 3 = third top-performing channel).

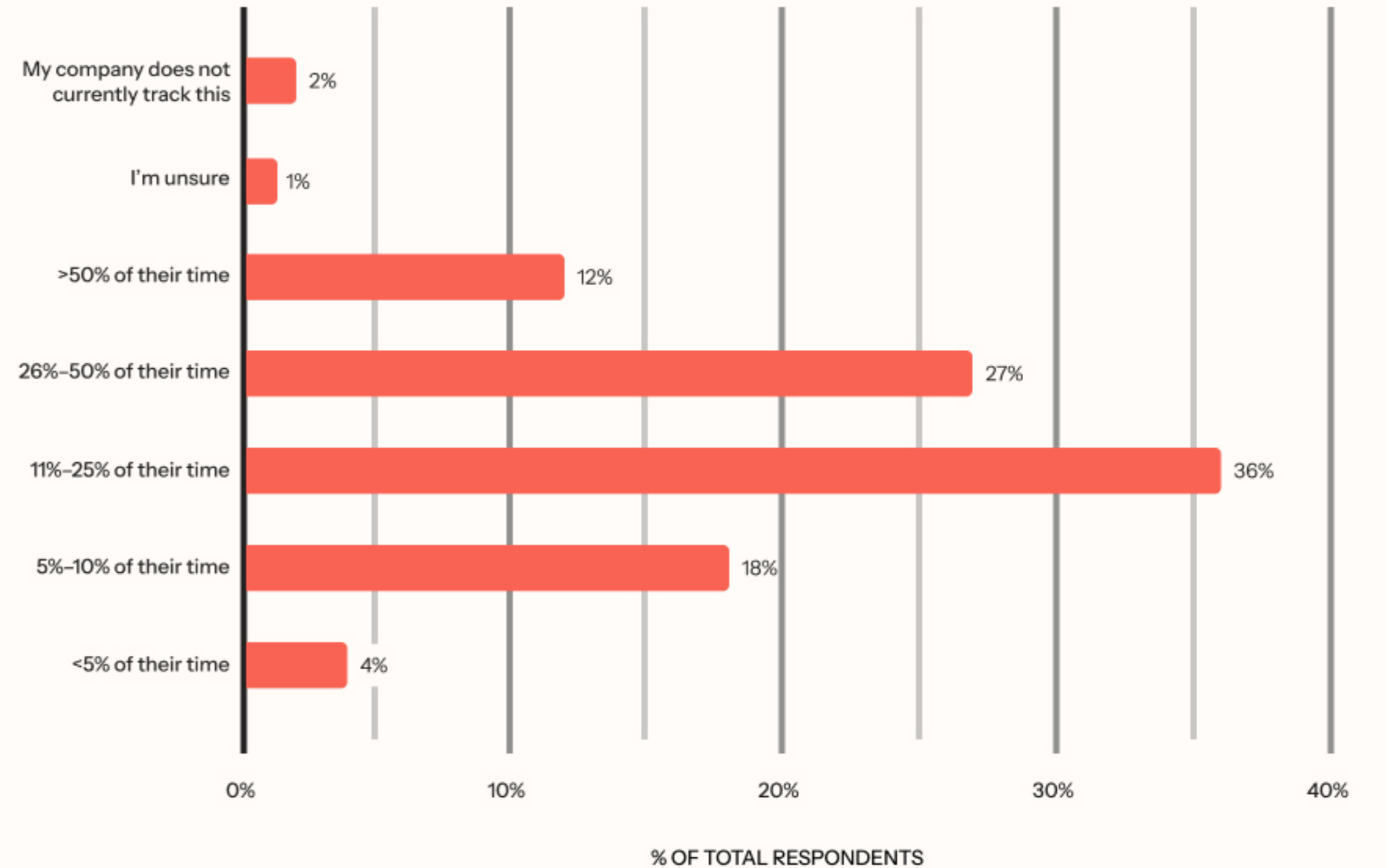


The majority of marketers are responsible for customer service—but don't have the platform integration they need

Marketers are taking on more responsibility for customer service—75% say it makes up more than 10% of their role—but only 29% of marketing and customer service teams are fully aligned and integrated.

This gap creates friction—especially in an omnichannel context. It also limits visibility into customer needs and slows down response times.

Q18. Which of the following best describes the average amount of time that your company's marketing team spends on customer service activities? (select one)



How Filson wins by putting the customer journey first

Rather than focusing on one channel, outdoor clothing and gear brand Filson focused on customer behavior to create cohesive customer journeys that convert.



What they did

Filson wanted to modernize their customer experience and boost retention beyond email. With a loyal customer base and a large subscriber list, they expanded into SMS to create more personalized and rewarding journeys for their VIPs.

How they did it

Using Klaviyo to manage email and SMS in one place, Filson enabled smarter segmentation and eliminated duplicate sends. They also collected customer preference data with [Klaviyo forms](#) and integrated with [Meta](#), [Google](#), and [Pinterest](#) to enhance paid targeting.

Results

- 29% of total ecommerce revenue from Klaviyo in 2024 YTD
- 65K+ net new SMS subscribers in 2024
- 3.5x YoY SMS revenue growth since first month using Klaviyo SMS

[Read the case study](#)



Takeaways for brands

Customers don't think in channels—they think in experiences. The new era of consumer marketing demands orchestrated, channel-agnostic customer journeys, not campaign blasts.

Whether they're buying a product via social media or contacting support, people expect every touchpoint to feel consistent, personal, and relevant. Brands that align marketing, support, and data on a single, unified platform are the ones turning this expectation into a competitive advantage.



Service-driven marketing comes out on top

Leading brands are integrating customer service into their marketing strategy to exceed their goals and delight customers.



Top-performing brands in 2025 are rethinking how their teams, tools, and data work together

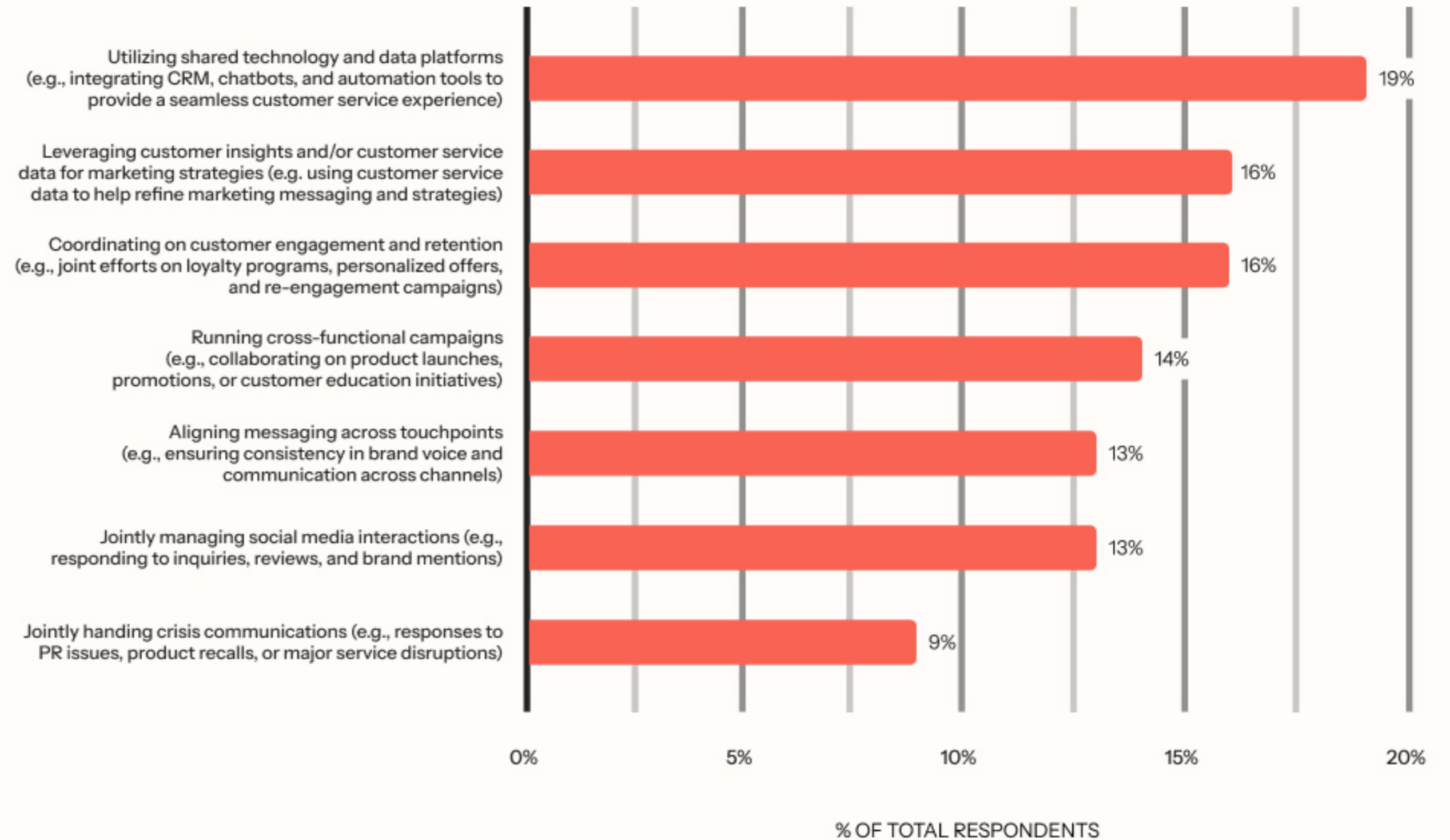
The data shows a clear pattern: brands that outperform their targets are far more likely to have tight alignment between marketing and customer service.

The competitive advantage of unified data

Marketers are recognizing the growing value of personal data like zero- and first-party data: 47% collect and use it for marketing and personalization. But turning that insight into action depends on having the right infrastructure in place. Despite its potential for allowing marketing and customer service to work from a single, unified customer profile, only 19% of marketers report that the primary way they collaborate with customer service teams is using shared technology platforms—highlighting how much room there is for brands to better collect, connect, and activate that data across the entire customer journey.

53% of companies outperforming their marketing targets by a significant margin report that their marketing and customer service teams are fully aligned and integrated.

Q17. Which of the following best describes how your company's marketing and customer service teams collaborate?



Yet only 19% of brands say shared technology is the primary way their marketing and customer service teams collaborate.

What happens when marketing and customer service teams are truly aligned?

Brands that break down silos and invest in integration see major gains in performance, satisfaction, and profitability.

Compared to those that are moderately aligned or worse, brands with fully or highly aligned marketing and customer service teams are:

156%

more likely to significantly exceed marketing goals

70%

less likely to report rising CACs with falling CLV

14%

more likely to report CSAT scores >70%

26%

more likely to report average CLV >\$1,000

What the highest-performing B2C brands do differently

From smarter tech to tighter team alignment, the top performing B2C brands are making intentional moves that give them a competitive edge.

Here's what they're doing—and why it's working.

BEHAVIOR

Adopting AI

Implementing self-service for customer service

Focusing on CSAT and CLV

RESULT

Marketers using AI are **46% more likely to exceed their goals** in 2025 than those not using AI (19% vs. 13%).

Brands with **61–80% of customer service handled by self-service** are **133% more likely to significantly exceed their marketing goals** than brands with under 20% handled by self-service (28% vs. 12%).

Brands with **CSAT scores over 80%** are **136% more likely to significantly exceed their marketing goals** than those with CSAT scores under 80% (26% vs. 11%).

WHY IT WORKS

AI enables predictive analytics, dynamic personalization, and automated segmentation.

Brands can deliver relevant experiences at scale, optimize performance in real-time, and make smarter decisions across the funnel.

Self-service tools—like FAQs, knowledge bases, automated chat, and customer hubs—reduce friction, resolve issues faster, and lower support costs.

This improves satisfaction, streamlines operations, and frees up human agents for higher-value interactions.

High CSAT scores signal strong customer relationships and drive retention. Satisfied customers buy more often, stay longer, and refer others—boosting CLV and improving long-term profitability.

How two high-performing brands are bringing these winning strategies to life

What happens when brands put these strategies into practice?



WINNING STRATEGIES

Natural skincare brand [Tata Harper](#) used [AI-powered forms display optimization](#) and drove a **65% increase in submissions** to two sign-up pop-ups, which helped **boost welcome flow revenue by 27%**. This shows how smart use of AI and centralized data fuels growth.

Centralizing customer data in Klaviyo also helped support **43% YoY growth in Klaviyo-attributed value** for Tata Harper—because tech consolidation enables smarter, more agile marketing.

[Read the case study](#)



Performance clothing brand Ministry of Supply enabled **over 650 self-serve support interactions in under 4 months** with Klaviyo Customer Hub. That meant fewer support tickets and a more cohesive, personalized experience—thanks to better marketing and customer service alignment.

[Read the case study](#)



Ministry of Supply^o

Takeaways for brands

Customers notice when marketing and service are integrated.

Top-performing brands think in moments, not messages: they align their CRM touchpoints to create consistency across every interaction—protecting customer lifetime value, brand trust, and their bottom line.



Closing data gaps is key to personalization at scale

AI and CRMs are top tech priorities—but without shared data infrastructure, personalization remains fragmented and less effective.



AI and CRM adoption is on the rise, but a lack of unified infrastructure limits how far these tools can take personalization and performance

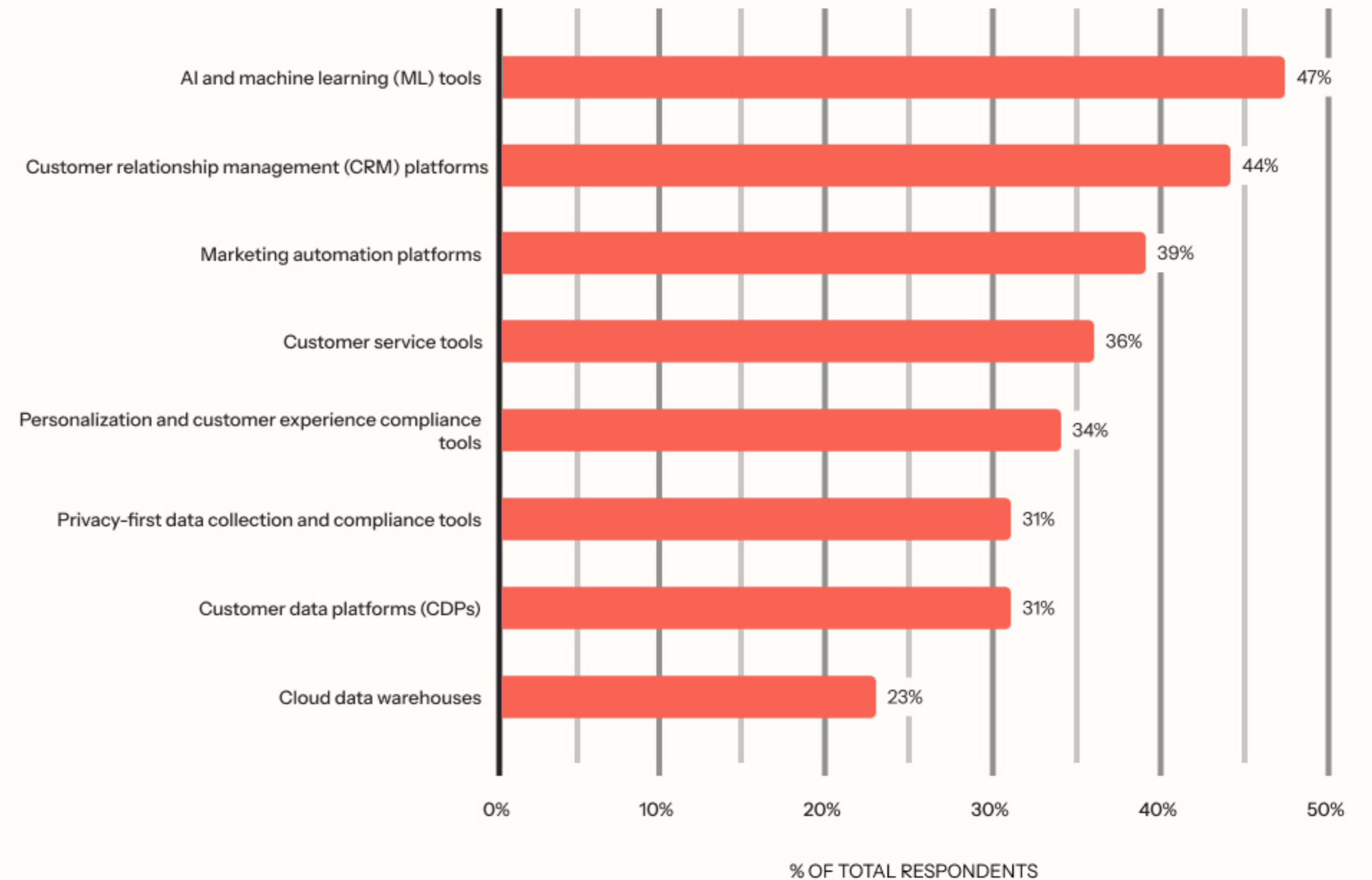
As marketers lean more into advanced technologies, two key investment priorities emerge: AI (47%) and CRMs (44%).

These tools hold significant potential to personalize customer experiences, automate processes, and boost engagement.

But just 31% are investing in customer data platforms (CDPs), which suggests a fragmented approach to personalization.

This disconnect shows that while marketers are adopting advanced technologies, they're still working with disjointed data sources. AI and CRM tools are only as effective as the data they process—and without a unified data infrastructure, these technologies fall short of reaching their full potential.

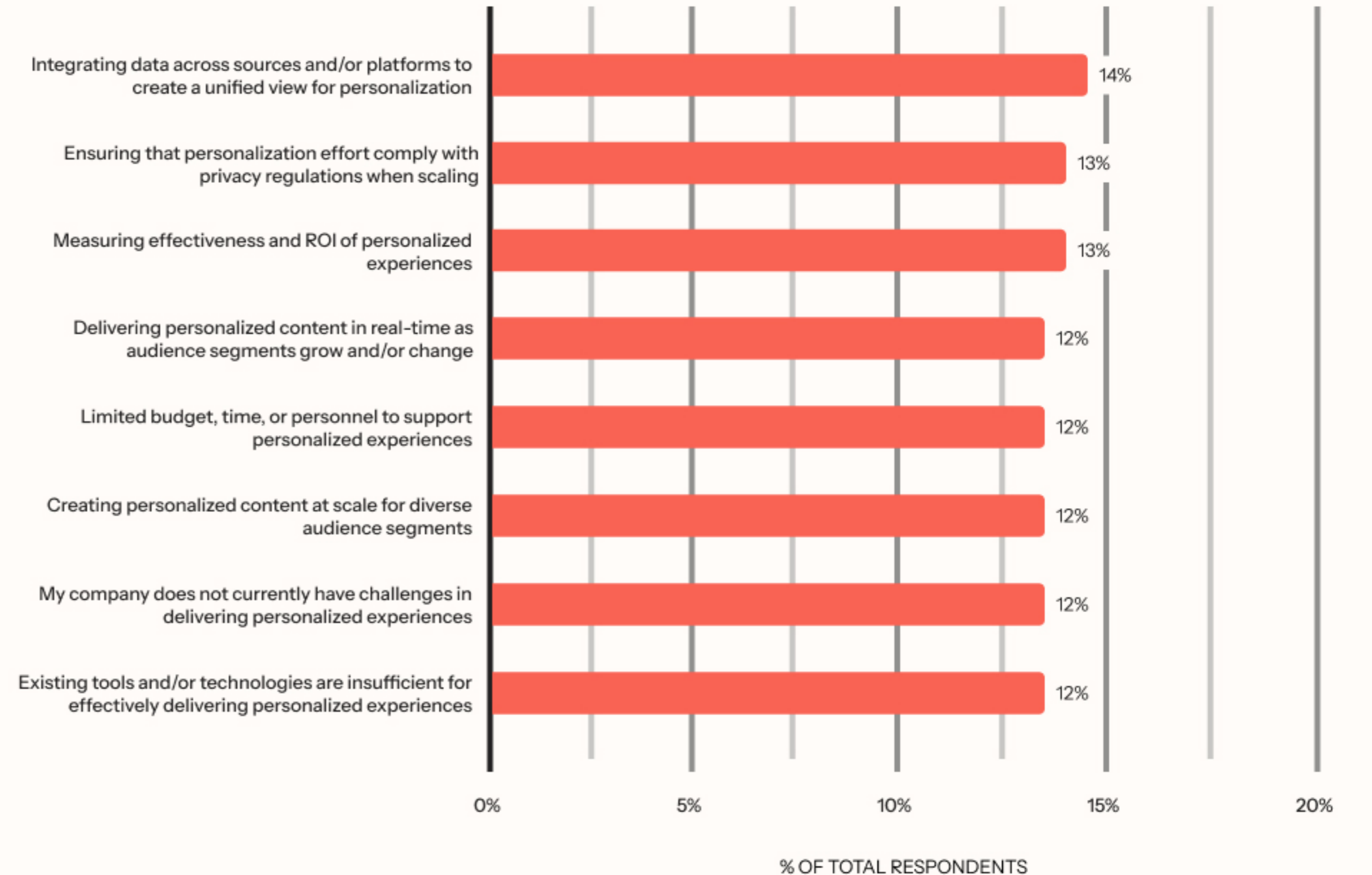
Q29. Which of the following marketing technology investment(s) in your company prioritizing in 2025?
(select all that apply)



A unified tech stack will be key to unlocking relevant personalization

Infrastructure alignment is crucial: the biggest personalization challenge marketers face is integrating data across multiple sources or platforms. Delivering the cohesive, personalized journeys that customers expect is incredibly difficult to do without a unified tech stack.

Q25. Which of the following best describes your company's biggest challenge for delivering personalized experiences (e.g. campaigns, automation, customer service)?



How Daily Harvest scales personalization with a streamlined tech stack

Consolidating 4 tools into Klaviyo gave sustainable meal and snack brand Daily Harvest the agility to move faster and personalize every customer interaction.



What they did

Daily Harvest replaced a fragmented, custom-built ecommerce and marketing stack with Shopify and Klaviyo. Why? They needed to improve efficiency and consolidate tools to lower costs.

How they did it

They migrated from a legacy set-up that included a custom site and reviews platform, a data warehouse, and a complex email system. In 4 months, they consolidated all 4 of those tools into Klaviyo. They also improved segmentation and automation efforts with [Klaviyo Data Platform \(KDP\)](#).

Results

- 18% reduction in ecommerce tech costs
- 50+ developer hours saved per month
- 67+ segments created using real-time customer and Shopify data



[Read the case study](#)

Takeaways for brands

Disconnected systems create unnecessary drag, leaving brands vulnerable in a shifting market.

Leading brands are closing the gaps with unified platforms that accelerate personalization, improve agility, and protect profitability—even when growth slows.



PLATFORM DIFFERENTIATORS

Built for modern B2C growth

Top-performing brands grow faster with platforms designed to unify data, channels, and teams.



Brands need a platform where every feature works together

All the challenges we've highlighted—fragmented data silos, rising acquisition costs, and unaligned customer service and marketing functions—are symptomatic of disparate technology infrastructures. Modern platforms solve this by bringing customer data, AI-driven insights, and omnichannel orchestration into one place, letting you move faster, stay coordinated, and deliver truly cohesive customer experiences.

Klaviyo B2C CRM brings a built-in CDP, embedded AI, an omnichannel campaign builder, and smart automations into one platform, so you can unify data, predict behavior, and personalize every touchpoint.

PLATFORM AND FEATURE DIFFERENTIATORS FOR MODERN B2C GROWTH

Klaviyo Data Platform (KDP)

Why these features matter

Unifies commerce, support, and marketing data in one platform to deliver personalized experiences

The Klaviyo advantage

Klaviyo has 350+ integrations and syncs data in real time, giving teams a comprehensive, up-to-date view of each customer and allowing for personalization at scale.

Embedded AI

Predicts customer churn, behavior, and channel preferences for better targeted interactions

AI is built into the Klaviyo platform, meaning insights are automatically incorporated into your marketing and customer service flows.

Omnichannel Campaign Builder

Creates seamless, consistent experiences across channels

Brands can create cohesive customer journeys across email, SMS, push, and more, all on a single canvas with one journey logic.

Channel Affinity AI

Understands how customers prefer to engage with your brand to prevent fatigue and improve conversions

Klaviyo learns from real data, not static rules, to understand how each customer engages with your brand across different channels, without overmessaging.

AI Agent

Automates answers to common questions to reduce support volume and allow teams to focus on improving service quality

Klaviyo AI Agent automates responses to FAQs and answers policy, shipping, and product questions over any channel.

Responsive logic

Connects customer service to marketing logic in real time to boost customer satisfaction

Brands can rely on automated, personalized adjustments during customer interactions, like pausing promotions for VIP customers in a support flow.

What B2C marketers should do now

Customers don't see departments or org structures—they see brands. That's why top-performing brands are consolidating fragmented tools, integrating AI with real-time data, and aligning service and marketing KPIs around CLV.



What the highest-performing B2C brands do differently

From smarter tech to tighter team alignment, the top performing B2C brands are making intentional moves that give them a competitive edge. Here's what they're doing—and why it's working.

GOAL

Reduce service load

Unify teams + metrics

Eliminate waste

Build resilience

ACTION

Let AI handle FAQs + transactional flows.

Automate answers to common questions and reduce dependency on human agents for order updates and transactional communications.

Align KPIs across marketing + customer service.

Create a single view of customer performance and experience by aligning success metrics across marketing and customer support.

Invest in platforms, not point solutions, to unify profiles.

Consolidate platforms and reduce duplicate tools to streamline processes and data access.

Prioritize CLV.

Focus on retention, margin, profitability, and loyalty.

KLAVIYO STRATEGY

Use **AI Agent** to respond to FAQs in real time and deploy **branded transactional automations** (e.g., shipping updates and order confirmations) to reduce support tickets.

Use [shared reporting dashboards](#) to track CLV, customer sentiment, and ROI to unify goals and measure the end-to-end customer journey across both teams.

Replace fragmented tools with an integrated platform that supports email, SMS, and reviews with an embedded CDP to unify customer profiles and bring marketing and customer support teams together.

Launch **post-purchase, reactivation, up-sell, and loyalty flows** to increase margin and reduce reliance on acquisition-heavy strategies.

One platform. Every interaction.

B2C brands don't have time—or budget—to waste in 2025. Customers are harder to reach and more selective. And the winning brands aren't the loudest—they're the most connected, personal, and resilient.

With Klaviyo, the only CRM built for B2C, you can finally achieve true omnichannel orchestration powered by your own real-time data.

One single CRM for marketing, service, and commerce

Real-time activation of customer data that powers personalization at scale

AI-driven automations that increase retention and protect your margins

**Fewer silos, faster execution—
one source of truth for your teams**

Fewer tools. Smarter engagement. Real ROI.

From first click to lifelong customer—Klaviyo powers the entire journey

Get a demo

Methodology

To gain these data points, Klaviyo conducted a survey in March 2025 in collaboration with Datalily with a total of 1,512 marketers across industries in:

- The United States
- The United Kingdom
- Australia
- New Zealand
- Singapore
- Ireland
- Canada
- France
- Belgium
- Germany

Report created in collaboration with Datalily
www.datalily.com • hello@datalily.com

klaviyo[®]

The only CRM built for B2C