

# 2025 STATE OF B2B ECOMMERCE REPORT



Presented by

**MASTER B2B**

In partnership  
with



# INTRODUCTION

**EVERY YEAR WE LOOK FORWARD TO REFLECTING ON** what we've learned over the last year and what that means for the year ahead. Once again this year we were surprised (in a good way!) by the results of our executive survey and in-depth interviews.

But as we publish this report, nearly all digital discussions have taken a back seat to conversations about how companies can be best equipped to handle changing tariffs. Also, AI continues to disrupt key business processes and conventional strategies.

More tactically, execs are still trying to solve the puzzle of how to surface the right products when visitors are looking for them. They continue to invest in PIM, search tools and personalization to make products more findable. But at the same time, they struggle to provide a streamlined customer experience journey that comes anywhere close to what Amazon provides.

But perhaps most surprisingly, what we learned from the survey and our industry conversations, is that many B2B companies aren't being held back because of technology or tools. They're being held back largely because they don't have senior leadership with digital experience, which translates into them failing to gain headcount devoted to digital roles and thus keeping pace with change.

B2B executives continue to spend on key people, technology, and processes. But we do see B2B companies being more expeditious in the coming months about where and how they spend their limited dollars.



Andy Hoar



Brian Beck



# 2025 STATE OF B2B ECOMMERCE REPORT

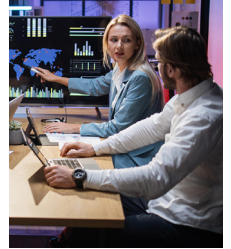
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Practitioners Still See Cultural Barriers Slowing (or Preventing) a Shift to a Digital Future



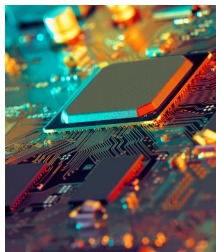
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To Increase Digital Maturity, the Team Needs More Digital Maturity



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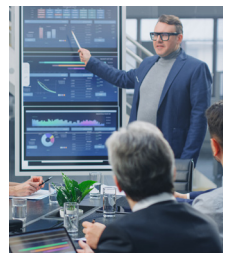
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## 01 DIGITAL CULTURE GAP

# Practitioners Still See Cultural Barriers Slowing (or Preventing) a Shift to a Digital Future

**ANALYSIS** We kicked off our recent annual survey of B2B eCommerce practitioners by asking them to rank the most significant challenges they face in their roles. Overwhelmingly, they told us they are struggling with the most fundamental of issues: “Migrating the business from analog-centric to digital-centric (i.e., increasing revenues through digital channels).”

This may seem like a very broad problem for practitioners to try to solve, but what they are really saying is that there is — still, after at least two decades of digital commerce — a massive cultural barrier that is preventing B2B companies from fully embracing digital commerce in a way that most of their B2C counterparts accepted years ago.



There is still a massive cultural barrier that is preventing B2B companies from fully embracing digital commerce like most of their B2C counterparts did years ago.

# 01 DIGITAL CULTURE GAP (continued)

**ANALYSIS** To be sure, respondents shared that they were struggling with more digital-specific challenges, including “managing product, inventory and customer data” and “improving customer experience.” And underlying both issues is that B2B companies are finding it enormously difficult to create world-class personalized customer experiences because they cannot get clean data into the hands of their customer-facing employees (or into digital tools that will improve the online purchase experience).

In addition to the challenge of migrating the business to digital, the final significant challenge they listed — “Obtaining leadership/cross functional buy-in for digital investments” — shows that at the heart of it, digital executives at B2B businesses have a long way to go to convince company leadership that embracing a migration to digital is the best path forward for the company.



## MASTER B2B TAKE

**NOW IS AS GOOD A TIME AS ANY** for open, honest conversations with senior leadership about how they view the place of digital in the business. Virtually every B2B eCommerce practitioner we’ve ever met is a true believer in digital. That’s wonderful. But it sometimes means that when meeting with people outside of the digital team — including still-somewhat-skeptical-of-digital senior leaders — digital leaders should be doing more listening than talking. Creating long-term change starts with understanding — deeply — the concerns of those who are not aligned with your digital vision, and building trust over time to overcome those concerns. It’s not a quick process, but the alternative is years of frustration over why the organization won’t change to meet your expectations.

## 02 DIGITAL MATURITY

# To Increase Digital Maturity, The Team Needs More Digital Maturity

**ANALYSIS** In the Master B2B Forum, we see lots of discussion amongst practitioners about technology. Key questions asked include: Which solution providers are the best? How do you select an implementation partner? What price should I expect to pay for services?

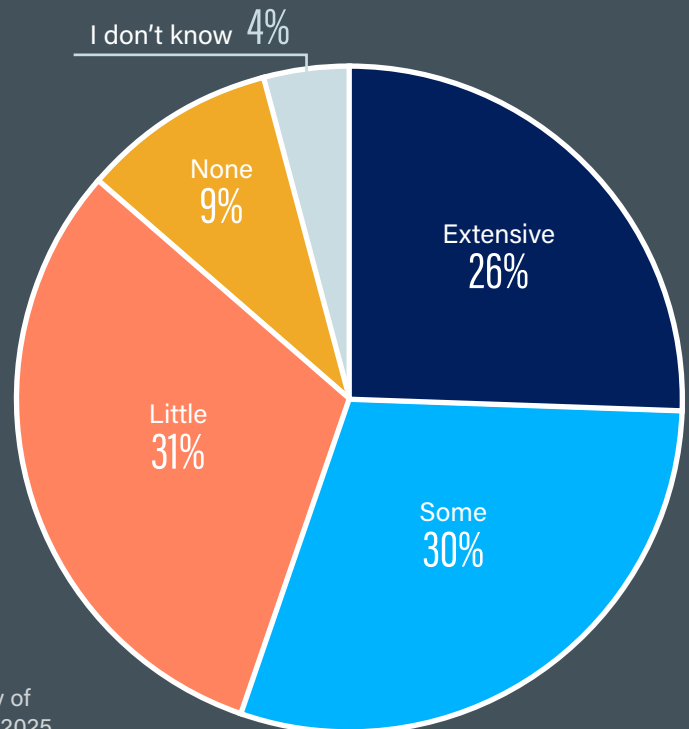
Certainly the specific technologies companies use matters and contributes (to some extent) to the success of the business. But we believe that the people in the organization — far more than the specific technologies — drive the digital success of the business.

Our survey reinforced that belief. When we asked practitioners about the digital maturity of the team members in their organization, from top to bottom they said that their companies lacked digital experience and specialization.



### B2B PRACTITIONER SURVEY

What level of digital experience does the most senior business leader in your organization have (e.g., President, CEO)?



Source: Master B2B survey of B2B practitioners, January 2025

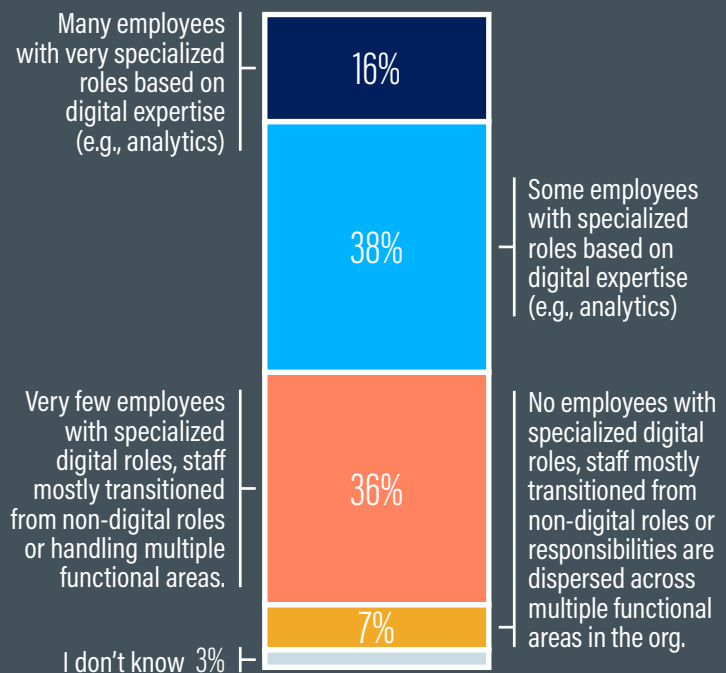
## 02 DIGITAL MATURITY (continued)

**ANALYSIS** More than 40% of people said that their company had “very few employees with specialized digital roles” or “no employees with specialized digital roles.” They relied on team members who were juggling digital responsibilities alongside other non-digital responsibilities. Or, even more challenging, they had few people, if any, in the organization who were exclusively focused on digital (many even said they had team members with no digital background whatsoever).

But perhaps more troubling, more than 40% of execs said that the most senior business leader in the organization had “little” or “no” digital experience at all. That’s not going to cut it in the year 2025.

### B2B PRACTITIONER SURVEY

#### How advanced is your digital organizational structure?



Source: Master B2B survey of B2B practitioners, January 2025

## MASTER B2B TAKE

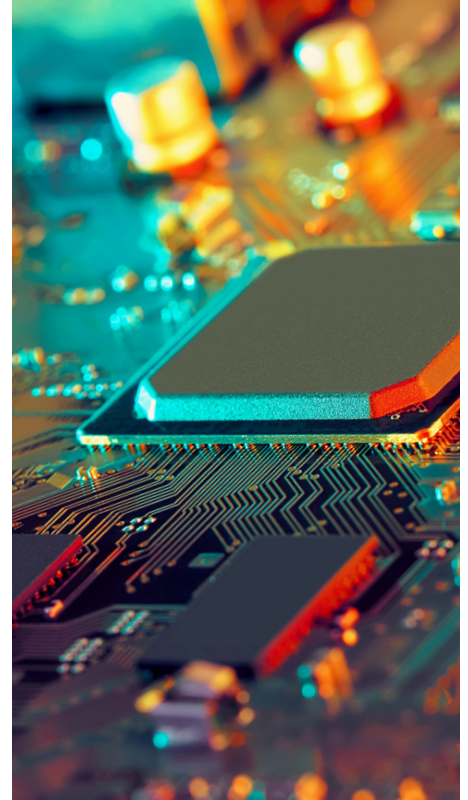
**WE DO NOT SEE AN EASY PATH TO DIGITAL MATURITY** if senior leadership has no experience with managing a digitally-focused organization and if the team running the day-to-day operations also has little-to-no digital experience. Senior digital leaders in companies without digital experience at the top of the organization need to begin a persistent and throughgoing education of the C-Suite. Without senior leaders who understand the value of digital experience, B2B companies will fail to mature quickly enough digitally to keep pace with ever-rising customer expectations.

## 03 KEY TRENDS

# Practitioners Most Frequently Cite AI's Impact, But Also See Other Key Priorities

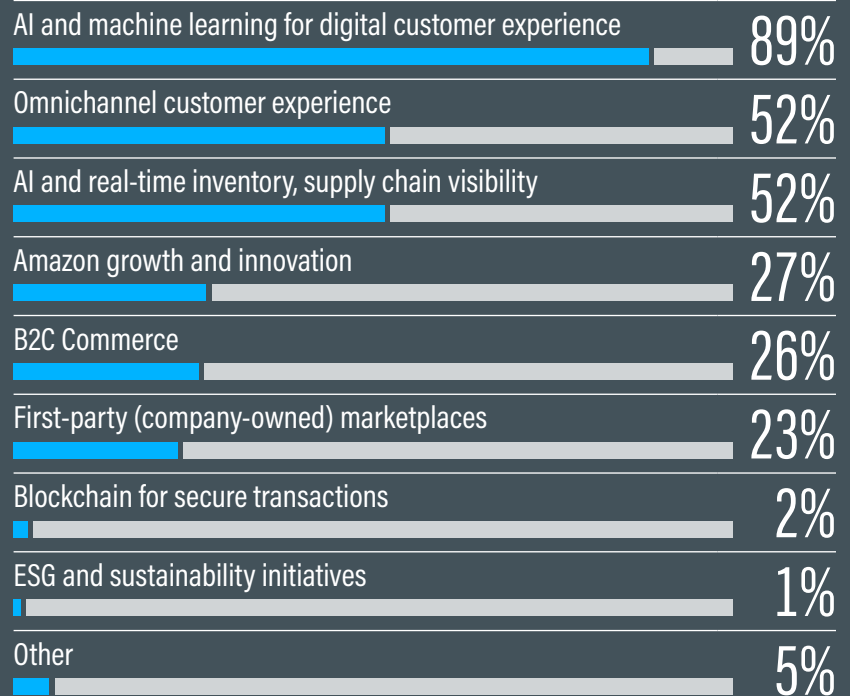
**ANALYSIS** It should not come as a surprise that practitioners are fully convinced that new AI technology will impact the customer experience over the coming years. However, what is surprising is how much more pervasive that view is now than it was just a few short years ago.

When we asked executives what trends they think will have the most significant impact on B2B Commerce over the next 3-5 years (and allowed them to select 3 options), a whopping 89% selected “AI and machine learning for digital customer experience.” For a technology that has been available for more than ten years (think of website personalization, product recommendations, and A/B test optimization products), that’s a surprising result. Clearly AI has risen to the top on digital exec’s priority list.



### B2B PRACTITIONER SURVEY

Which trends do you think will have the most significant impact on B2B Commerce over the next 3-5 years? (Select up to 3)



Source: Master B2B survey of B2B practitioners, January 2025

## 03 KEY TRENDS (continued)

**ANALYSIS** However, AI is not the only trend that B2B execs are focused on these days. Practitioners also responded that building an omnichannel customer experience, and offering real-time inventory and supply chain visibility, will also significantly impact their digital offerings. In fact, nearly half of all respondents cited those two items as high priorities.

What surprised us was that only 27% said that Amazon's growth and innovation would be one of the most significant impacts on their digital business. Why was this low number such a surprise? Because Amazon has been at the forefront of using AI for digital customer experience, real-time inventory and supply chain visibility for years. In other words, Amazon has been focused for ages on building the experience that B2B practitioners say will impact them in the next 3-5 years. How could that NOT impact their digital business going forward?



### MASTER B2B TAKE

**MASTER B2B MEMBER TRENT GUYER**, who runs marketing and digital for Grasshopper Mowers, recently told us that they have embraced Amazon as a distribution channel, but have thought about how they can provide an even better customer experience using their own distribution channels. So while they offer a range of aftermarket parts on Amazon, those products are available at a lower price and with same day delivery through Grasshopper's dealer network. Part of thinking about real-time inventory, omnichannel and customer experience is understanding where the company is uniquely well positioned to provide a better experience than Amazon.

## 04 CRITICAL SKILLS

# The Skills B2B Practitioners Need Complement a Heightened Focus on AI

**ANALYSIS** When we asked practitioners an open-ended question about what skills or expertise they believed were critical for B2B commerce success, we expected to see lots of responses saying that team members needed to become better versed in new AI technologies.

But when we put the responses into a word cloud, we saw that AI was not the only skill B2B companies sought. In fact, other analytical skills collectively trumped AI overall:



### B2B PRACTITIONER SURVEY

What employee skills or expertise do you think are critical for success in B2B commerce today?



Source: Master B2B survey of B2B practitioners, January 2025

## 04 CRITICAL SKILLS (continued)

**ANALYSIS** The key skills cited for a modern B2B commerce practitioner include skills in data, data analytics and critical thinking. In other words, leaders in the space do not believe that AI will serve as an autonomous technology that will ingest information, analyze it, and create output without human intervention. Rather, they believe that highly analytical team members will guide both the inputs and the outputs, aided by powerful new AI tooling.

This will mark a shift from hiring staff that can execute on specific tasks (setting up and sending emails, for example) and toward hiring staff that can analyze data to direct tools to create outcomes that align with that analysis. As an example, expect to see B2B companies hire people who can analyze response data, create compelling segments, and work with AI tools to build emails with messaging that optimizes conversion for each segment.



### MASTER B2B TAKE

**WE BELIEVE NEW COLLEGE GRADUATES** are being taught these analytical skills in their courses, so we expect there to be an ample supply of workers early in their careers who can provide what the modern B2B commerce organization is looking for now. There are also many current B2B employees who are upskilling to adapt to a new, AI-driven world. Our question is whether hiring managers are recognizing a new AI-led reality and both identifying and successfully recruiting talent with critical analytical skills that complement AI. B2B companies must undergo a massive mindshift in thinking about how and where employees can add value most decisively these days and going forward.

## 05 TECH PURCHASING

# Gain Alignment Across Teams Before Buying New Technology

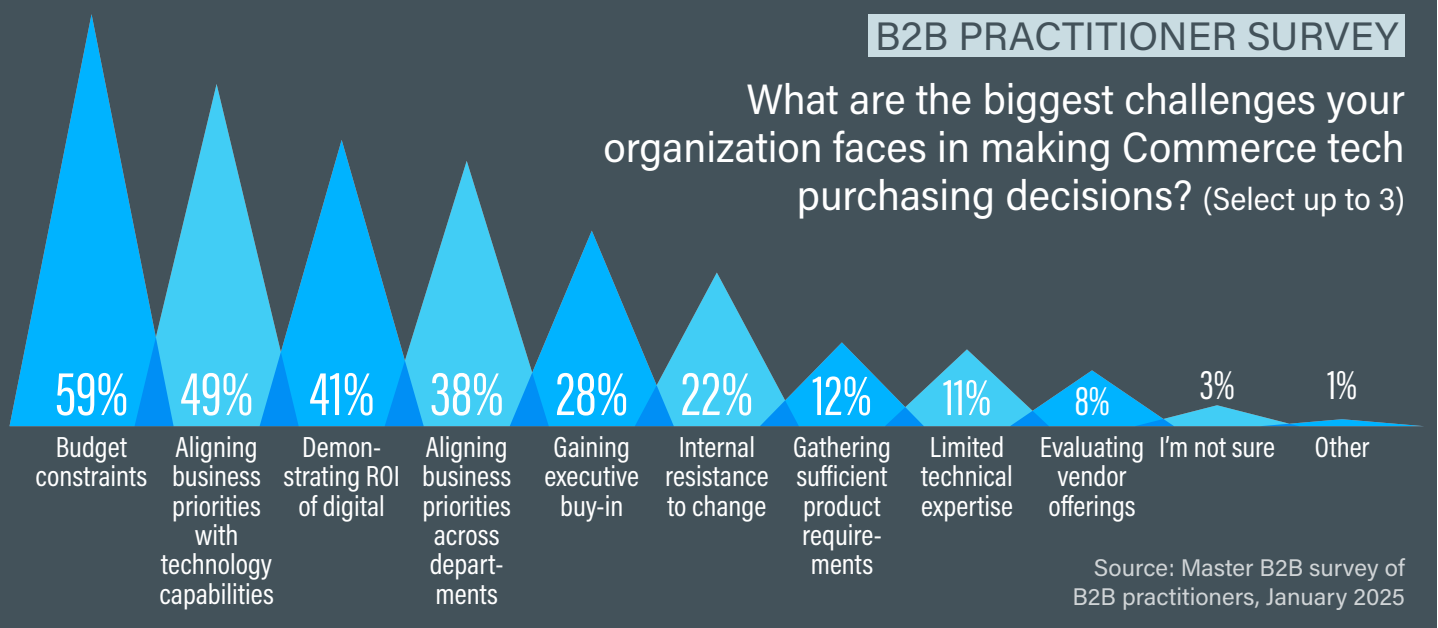
**ANALYSIS** One thing we've learned from years of surveying B2B executives about technologies is that if you ask them if they have enough budget to meet their technology needs, they will answer that they do not. This year's survey was no different. When we asked execs about their biggest challenges regarding making tech purchasing decisions, 59% cited "budget constraints" most often.

The next responses were equally illuminating, with 49% saying that they were challenged by aligning business priorities with technology capabilities. A significant number of respondents added that demonstrating ROI (41%) and aligning business priorities across departments (38%) were among the top obstacles they faced.



### B2B PRACTITIONER SURVEY

What are the biggest challenges your organization faces in making Commerce tech purchasing decisions? (Select up to 3)



Source: Master B2B survey of B2B practitioners, January 2025

## 05 TECH PURCHASING (continued)

**ANALYSIS** It is notable that only 11% said that “limited technical expertise” was one of the biggest challenges (which we read as “of course we understand technology!”) and only 8% said one of the biggest challenges was “evaluating vendor offerings.” That so few people said the vendor evaluation was a significant challenge was striking to us. In the Master B2B Forum, we frequently hear from practitioners who are evaluating new technology and are looking for input from others about their experiences. Often this is presented as, “it’s difficult to tell what is different about the various products.”

In our experience, technology vendors have not made it easy to evaluate their products. Their websites are often extremely unclear about how they differentiate themselves. It is possible that B2B commerce executives believe they are able to evaluate solutions on their own, but we see the difficulty of the evaluation process as a key impediment to buyers shortlisting vendors. Take a look at Andy Hoar’s Paradigm B2B Combine reports for an objective assessment of the B2B eCommerce solution providers.



### MASTER B2B TAKE

**THE KEY TO GAINING ALIGNMENT** is making sure that as many teams as possible are represented in some way in the buying process. That does not mean slowing the process down by making sure that every team has an equal voice. Instead, it means organizing a senior team that meets periodically during the process to review key decisions. We were surprised that when we asked which groups were involved in the tech buying process, only 31% said that finance leadership was part of that group. If demonstrating ROI is a significant challenge, ensuring that finance’s input is considered from the beginning of the process should help clear up confusion about whether an investment will offer significant ROI.

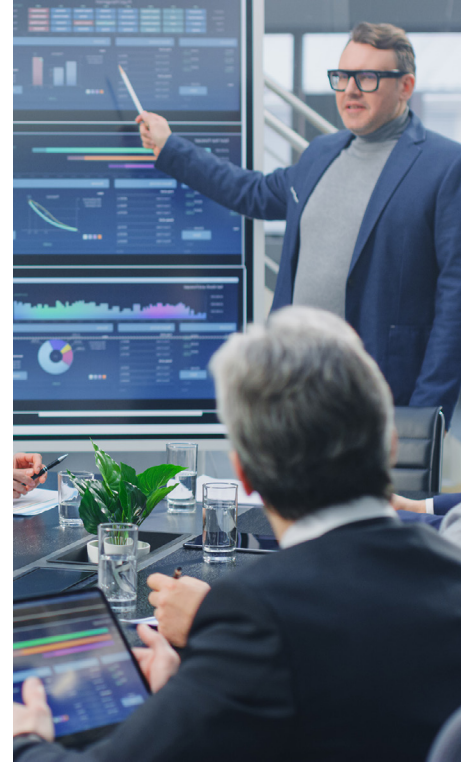
## 06 INVESTMENT GOALS

# Improving Product Findability Remains the Top Tech Investment Priority

**ANALYSIS** Just as digital transformation is never completely finished, neither is the search for highly effective site search. When we asked practitioners about their technology investment priorities for the coming year, their answers were wide-ranging, but “site search or recommendations” was right at the top. In fact, 43% of respondents said that they’ll be investing in improving how customers find products on their site.

Product Information Management (PIM) and Product Content Management (PCM) tools were next on the list of tech investment areas, with 41% of people saying those technologies are a priority for them. As a Master B2B member said to us recently, “Commerce leaders largely underestimate the power of building good data governance and centralizing product information.”

We also saw strong response from people saying their investment priorities including Enterprise Resource Planning (ERP) deployment and additional investment in commerce platforms.



### B2B PRACTITIONER SURVEY

What are your technology investment priorities for 2025? (Multiple responses allowed)

Site search or recommendations	43%
PIM/Product content management tools	41%
ERP <sup>1</sup> deployment and/or back-end integration	39%
Commerce platform	35%
Web content management tools	26%
Order management systems (OMS)	24%
Multi-channel integration	20%
Alternative payment methods	18%
Web site governance	12%
Mobile sites and apps	12%
Marketplace software	7%
Other	12%
I don't know	9%

1. Enterprise Resource Planning  
Source: Master B2B survey of B2B practitioners, January 2025

## 06 INVESTMENT GOALS (continued)

**ANALYSIS** Of note, we're still seeing significant investments in the building blocks of digital commerce. Manufacturers and distributors continue to invest in ERPs to ensure that their data is ingested into a single platform and used for processes all across the business. In addition, we're seeing more enhancements to commerce platforms than we're seeing full deployments of new platforms, as newer technology makes it easier for companies to build on to their existing commerce software.

B2B companies often have a significant number of SKUs, so PIM investments continue to soak up investment dollars. And as those SKUs grow in both depth and breadth, practitioners will need to deploy more advanced search capabilities so that buyers can find those products more quickly and effectively.



### MASTER B2B TAKE

**WE EXPECT PRACTITIONERS TO GET** a growing number of questions along the lines of, “Why do you need more money for search? Can’t AI just do that for us?” Digital commerce executives must have a story for their C-Suite about how they have thought through AI when they are asking for significant investments in new search technology. Shopify’s CEO recently told employees that they cannot hire new staff unless they prove that AI cannot do that job. That is an extreme position, but we think many more companies will be saying that they will not approve new non-AI tech spending unless the team can prove that an inexpensive AI tool cannot offer the same capabilities.


## 07 TECH INTEGRATION

# The Complexity of Integrating Multiple Technologies is Becoming an Issue

**ANALYSIS** Master B2B's Andy Hoar recently interviewed VTEX founder and Co-CEO Mariano Gomide about the eCommerce platform company's decision to leave the industry group MACH Alliance. Gomide told Andy that one of their primary concerns about how the software ecosystem has evolved is that as retailers and brands add more tools, the complexity of weaving together the various solutions becomes untenable. "When you join 30 or 40 solutions to become one suite, there is one big winner when you do this," Gomide said. He said he believes the only organizations that benefit from the complexity are system integrators.

Gomide's comment about SIs drove much conversation in the industry, with system integrators pushing back on the idea that they are in any way responsible for the technical challenges inherent in weaving together disparate systems.

But from our survey, it seems that Gomide is making a point that resonates with eCommerce executives.



"When you join 30 or 40 solutions to become one suite, there is one big winner ... system integrators."

—Mariano Gomide, founder and Co-CEO, VTEX



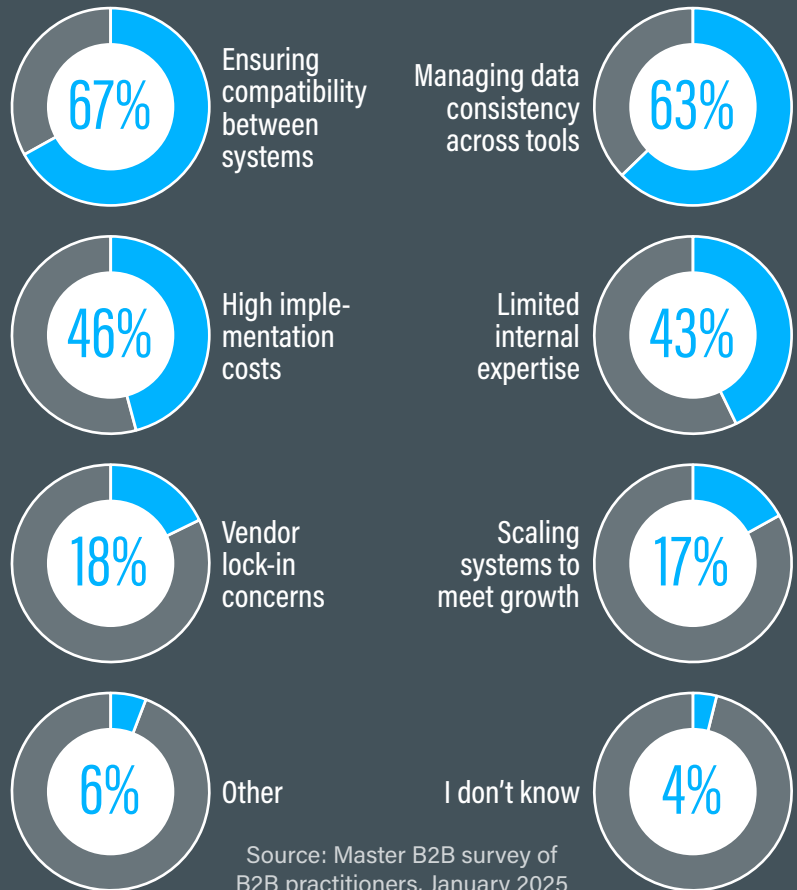
## 07 TECH INTEGRATION (continued)

**ANALYSIS** We asked practitioners what challenges their organization faced in integrating commerce technologies (and we allowed them to choose up to 3 options). Fully two-thirds said that “ensuring compatibility between systems” was one of those top challenges.

Going further, they said that “managing data consistency across tools” (63%), “high implementation costs” (46%) and “limited internal expertise” (43%) impeded their path to digital success. Echoing what Gomide mentioned, B2B execs said that once you hit a critical mass of different technologies, the integration and ongoing management of those tools requires a level of investment — in time, dollars, and people — that exceeds what many companies can budget.

### B2B PRACTITIONER SURVEY

What challenges does your organization face in integrating commerce-related technologies? (Select up to 3)



## MASTER B2B TAKE

**B2B ORGANIZATIONS THAT CONTINUE TO INVEST** in new technologies in the coming years should hire, at minimum, a business analyst who can work with the digital team to understand what requirements truly matter when implementing a solution. And not just in a static, one-time sense but in more dynamic fashion. Ongoing technical success requires building on a strong foundation so companies can add new tools without causing problems with the existing technologies.

## 08 B2B TECH DEMANDS

# B2B Executives Want Software Companies to Address Their B2B-Specific Challenges

**ANALYSIS** On a high level, the technology practitioners we surveyed shared many of the same challenges around complex integrations that their B2C brethren have also faced — those issues are not unique to B2B. But when we asked for specific suggestions about the one improvement they would like to see in commerce technology, their answers revealed the complex challenges specific to B2B:

“Improved LTL freight calculation based on order value”

“More flexible quoting price functionality”

“Calculating shipping costs based on dimensions weight of shopping cart”

“Use an actual Parent > Child hierarchy with orders related to the location they ship to and not to an individual customer”

“Customizable pricing in real-time”

## 08 B2B TECH DEMANDS (continued)

**ANALYSIS** Beyond specific functionality asks, many respondents mentioned that they wanted to be able to make more changes to the site (both front-end and back-end) without having to rely on technical resources. Despite their significant digital revenue, many practitioners we speak with say that they are understaffed, especially when it comes to technical resources. Putting more functionality into the hands of business users will allow them to unlock more of the deep capabilities many of the platforms provide.



### MASTER B2B TAKE

**B2B COMPANIES WILL ACCEPT** neither B2C software transplants that lack critical B2B functionality nor B2B-centric vendors that lack B2C-like customer experience feature sets. Buyers now expect both capabilities in their solution providers (platforms and partners alike). But it seems the bigger issue for vendors is the former problem (lacking critical B2B functionality). Getting there requires vendors to make a dedicated investment in the B2B market (rather than updating a B2C product to account for some B2B functionality) and a commitment to staffing with people who truly understand the needs of B2B companies. For technology providers that are willing to hyper-focus on B2B and double down on the space, a huge market awaits.

## ABOUT

# MASTER B2B

Master B2B publishes industry-leading thought leadership research and operates an elite community of B2B eCommerce executives who network and share best practices through peer-to-peer dinners, roundtables, and summits.

To learn more, visit [masterb2b.com](https://masterb2b.com).



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