

FINTECH MARKETING COMMUNITY ROUNDTABLE SUMMARY NOTES

Date: 11 February 2025

Location: New York

Our FinTech Marketing Roundtable on 11 February 2025 in New York City gathered senior leaders to discuss the shifting market dynamics shaping 2025. The conversation centred on budgets, GTM evolution, and the increasing role of data and technology. The following summary highlights the most notable takeaways and strategic considerations from the session.

1. Budget Priorities for 2025: Where Are Leaders Investing?

Participants shared that budgets for 2025 are being shaped by a stronger focus on ROI-driven marketing, automation, and strategic consolidation of tools. The key investment areas highlighted were:

- **Marketing Automation & AI Integration:** Budget is moving toward platforms that accelerate lead generation, personalise customer journeys, and reduce manual effort.
- **Content & Thought Leadership:** Continued emphasis on creating premium, insight-rich content to build credibility and support sales teams.
- **Customer Retention & Community Building:** Investments prioritising lifecycle marketing, community engagement, and customer advocacy programs.
- **Data Infrastructure:** Leaders are allocating significant budget to improve data accuracy, segmentation, and attribution.
- **Brand Visibility:** Despite tighter budgets in some areas, leaders emphasised that strong brand positioning is essential for competitive differentiation in 2025.

2. Winning Go-to-Market Strategies for the Americas in 2025

The discussion highlighted the need for evolved GTM approaches tailored to the Americas landscape:

- **Segmented & Localised GTM Motions:** Leaders stressed the importance of hyper-segmentation and adapting messaging to the maturity and regulatory environment of each market.
- **Partnership-Driven Growth:** Collaborations with associations, accelerators, and industry bodies are seen as key for faster market penetration.
- **Sales & Marketing Alignment:** GTM success hinges on tighter integration between revenue teams, shared KPIs, and clearer demand capture strategies.
- **Value-Based Messaging:** Buyers in 2025 expect concrete value propositions grounded in outcomes, efficiency gains, and cost savings.

- Experimentation & Fast Iteration: Testing new channels (especially partner channels, events, community-driven funnels) will remain critical for staying competitive.

3. Leveraging Data and Technology for Market Expansion

Data maturity continues to be one of the core enablers of growth. Leaders emphasised:

- Clean, Integrated Data Systems: Improving data governance, ensuring clean pipelines, and breaking down internal data silos is a top priority.
- Predictive Analytics for Expansion: Teams are using predictive modelling to identify new market opportunities, high-propensity segments, and expansion-ready geographies.
- AI for Personalisation & Insights: AI-driven personalisation is no longer optional — it is central to scaling outreach and improving customer experience.
- Real-Time Dashboards: Leaders are moving toward real-time visibility of pipeline performance, campaign impact, and customer engagement metrics.
- Compliance-Friendly Tech Stacks: As data regulations evolve, selecting tools that reinforce privacy, security, and compliance is essential.

Closing Note

The roundtable reinforced that 2025 will be a year defined by precision, efficiency, and strategic investment. FinTech organisations that integrate data-driven decision-making, future-ready technology, and tightly aligned GTM motions will be best positioned to accelerate growth in the Americas.

We look forward to continuing the conversation at our upcoming forums and roundtables.

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