

coterie

The 2025 **Partner Marketing** Skills Report: Trends, Gaps, and Opportunities in South Africa

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Foreword

Welcome to the Coterie Partner Marketing Skills 2030 Report, which analyses the key trends, gaps, and opportunities in the partner marketing sphere. This thought-provoking report, based on independent research draws on quantitative insights from across the partner marketing industry, augmented by in-depth perceptions and observations from leaders and thinkers in our sector.

The report speculates on the future of partner marketing, raises stimulating questions and poses points for consideration to all partner marketing professionals, partner marketing educators, and strategic leaders. While this report is optimistic overall, the research is a realistic eye-opener that challenges partner marketers and strategic leaders to think beyond the everyday business-as-usual and take the opportunity to reexamine their investment, training and upskilling in partner marketing skills, especially in light of the global obsession with AI.

Coterie, an industry leader in partner marketing and GTM strategies, has a proven track record of producing respected, insightful research on partner marketing. Coterie’s approach to knowledge-based insight is complemented by its partnerships with UK Higher Education academics, global partner marketing professionals and strategic leaders and is underpinned by research and development funding from UKRI Innovate UK.

The conversion of this research and development into practical action has led to the development of Coterie Connect, the first free partner and ecosystem global marketing community, and the Coterie Academy, offering training for partner marketers accredited by the Chartered Institute of Marketing and CPD.

The Coterie Partner Marketing Skills 2030 Report is more than just an analysis: it’s a call to action. We hope it challenges partner and ecosystem marketing professionals to reflect on what’s happening in our industry, to protect and enhance the skills we – and hopefully the next generation of partner marketers – are constantly developing so that we can all succeed as we enter the next chapter.

Shona Bettany,
Professor of Marketing at
The University of Huddersfield





01

Introduction



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With over 3.7bn people voting in 72 countries – the biggest election year in human history – 2024 was always going to be a bumpy ride for business.

For technology firms, the turbulence was even more pronounced. The rush to invest in AI collided with confusion and reluctance, general tech investments slowed due to global inflationary pressures, and the need to be both innovative and agile accelerated pace.

For marketers in the tech sector, especially those in the channel ecosystem, these challenges were compounded by a shift in team structure, evolving priorities driven by the obsession, paranoia and

excitement surrounding generative AI, and the relentless pressure to demonstrate Return On Investment (ROI) on spending and activities.

And yet despite these headwinds, partner marketers were upbeat about 2025, according to our research, with budgets increasing and a strong appetite for training to bridge skills and knowledge gaps.



In our previous research report: Ecosystems 2.0 – how to drive marketing value from your most important relationships, we focused on the changing face of ecosystem marketing, the impact these changes had on relationship building and the skills and technologies required to cultivate and drive business growth in the aftermath of the pandemic.

Building on this foundation, our latest research report investigates the challenges and emerging trends shaping ecosystem marketing skills today and in the future. Critically, we look at how the changing shape of the marketing function is impacting nuanced and specialist partner marketing skills, and we ask if these vital skills are at risk of being diluted as vendors and service providers seek greater efficiency amid economic and geopolitical uncertainty.



Our findings in this report also explore the essential capabilities partner marketers need today and in the future, highlighting how AI and automation are poised to transform the way we work. Additionally, we examine how and where partner marketing budgets are being allocated now and how that investment is expected to shift in the coming years.

This report is based on statistical research conducted by independent research firm Sapio (see methodology for more information). However, because the partner ecosystem is inherently human-centric – especially when it comes to marketing – we’ve complemented this data by interviewing a range of ecosystem executives from vendors, partners and service providers. Their stories and perspectives provide deeper context and bring the data to life, illustrating the real-world implications of the trends and challenges our research has uncovered.

This report blends research with personal insights to provide a clear view of today’s ecosystem marketing skills landscape.

We hope it offers the perspective you need to prepare, adapt, and equip your teams for the inevitable changes and transformations happening today, tomorrow and beyond.



02

Money matters; the ups and downs of partner marketing budgets



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For decades, vendors have leaned on their partner ecosystems during times of economic instability. The encouraging news from our research is that this time, vendors are reinforcing that reliance by increasing budgets.

According to the data,

84%

of partner marketers reported a funding boost.

Almost a third,

28%,

expect an increase of **1–9%.**

Over a third,

39%,

anticipate a rise of **10–19%.**

And

17%,

foresee budget increases of **20% or more.**

There are likely several factors contributing to this budget boost, even though the economic outlook is uncertain. For example, it could be to drive growth – shareholder pressure on vendors is ever-increasing.





Also, the competitive landscape is fierce. As customer budgets shrink, vendors must fight harder to get noticed through their marketing to win business. Additionally, the push for AI could be driving budget increases as firms look to invest in the technology to enhance and improve their marketing strategy.



I think it's likely that although marketing budgets are increasing, this is in line with overall budgets, and actually, it's not a percentage increase in real investment, it's just in line with overall budget growth."

Barnaby Wood, Director of Product Management, Arctera

On the other hand

8%

of marketers reported flat budgets,

while

8%

experienced budget cuts.

Unsurprisingly, among those facing reductions,

67%

said the decrease had a negative impact on their partner marketing strategy.

With agencies and events encountering the most cutbacks, the reduction in budget could be limiting marketers' ability to scale campaigns to reach new audiences, and therefore negatively impacting their ability to hit strategic goals.

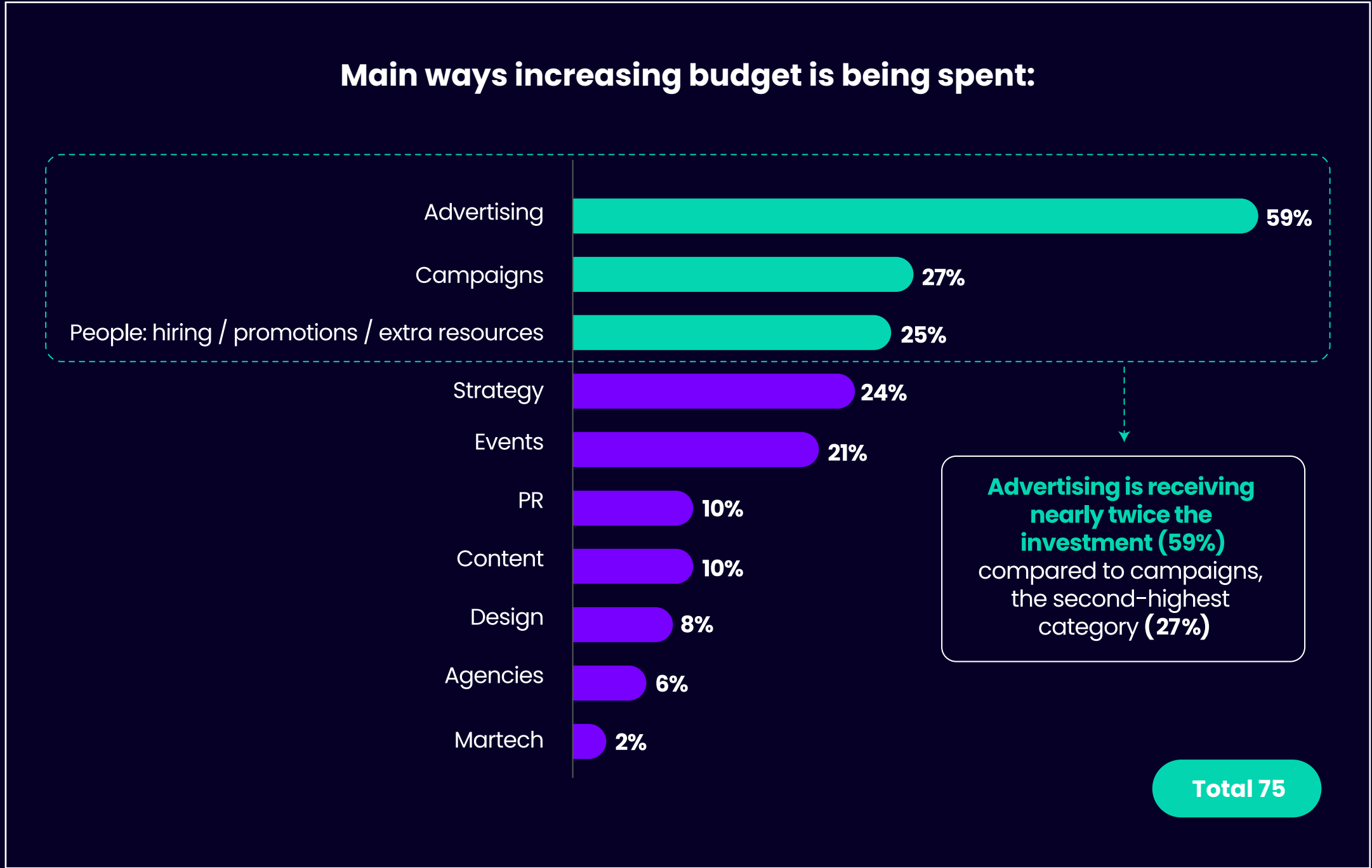


Spending priorities

While it’s positive news that spending is on the up for three-quarters of marketers, the key question is how this money is being allocated and whether it aligns with strategic priorities.

Our research shows that advertising is receiving significantly more investment than any other marketing activity. Among those with growing budgets, **59%** are directing additional funds to advertising—more than double the **27%** investing in campaigns and the **25%** focusing on people.

This spending pattern mirrors the top strategic priorities for partner marketers over the next 12 months, with advertising ranked highest (**47%**), followed by customer success (**37%**), and joint marketing campaigns (**33%**).



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Ecosystem executives we spoke to noted that much of this investment is likely in digital advertising, particularly on business-focused platforms such as LinkedIn, which offer highly targeted messaging at scale. Digital ad spending grew by a whopping **21.5%** over the past year in South Africa, according to the *IAB South Africa Online AdSpend Report*.

Another factor behind the high advertising spend is content syndication, where content is republished across multiple platforms to increase reach and visibility for articles, posts, or videos. As vendor and partner marketers look to drive end-user demand, content syndication is one way to drive traffic and increase brand awareness.



Companies have to be specific with their targeting or they just join the noise and achieve little or no traction with an audience. Whether it's running a niche services business or a volume transactional company, advertising on websites like LinkedIn has become essential to narrow the audience and then target them with key messages. Most importantly, it's all trackable and delivers the right data to constantly refine a strategy to make it more effective.

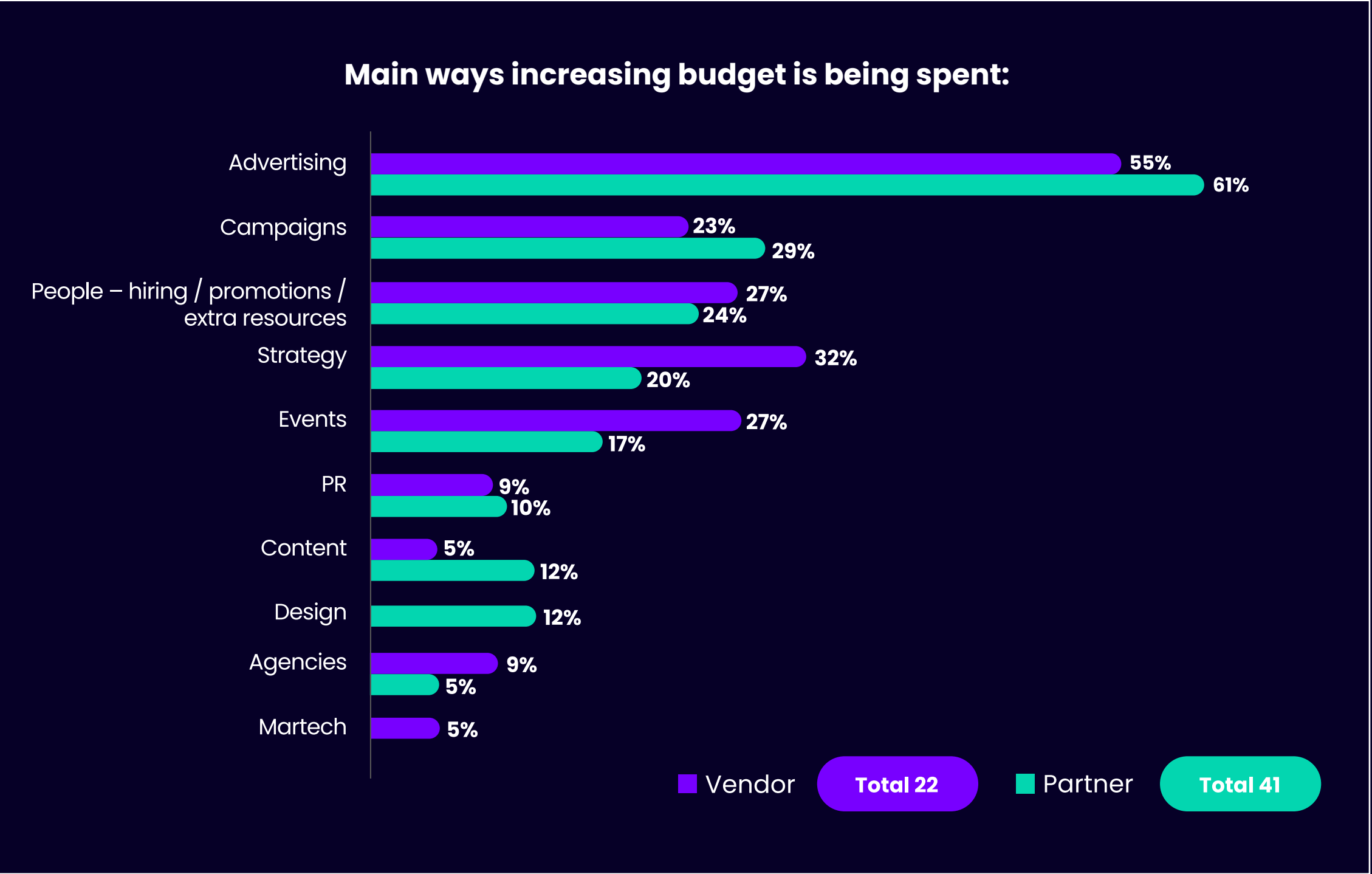
James Houselander, Director EMEA Marketing at HPE Aruba Networking





Vendors vs partners

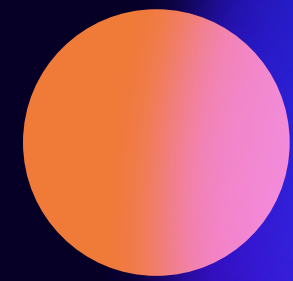
A closer look at the data reveals intriguing differences between vendor and partner spending priorities or the next 12 months.



While advertising remains the top investment for both, vendors are placing greater emphasis on strategy, with **32%** identifying this as a key area, compared to just **20%** of partner organisations.

In contrast, partners rank events as a much higher priority. This difference may stem from the partners’ need to generate end-user demand by leveraging marketing events, both in-person and online to drive middle- to bottom-of-the-funnel activity.

Vendors, on the other hand, are investing more in people to manage an increase in partner numbers, driven by an increased reliance on their partner ecosystems during economic downturns.



Low priority spending

At the lower end of the spending spectrum, martech and agencies are receiving minimal investment, with only **6% and 2%** of marketers, respectively, allocating significant funds to these areas. The limited focus on martech may seem surprising, given its ubiquity in channel and ecosystem marketing.

However, there could be two reasons for this. Firstly, budget constraints, skills gaps, poor adoption strategies, and difficulty in demonstrating clear ROI have hindered martech's perceived value, potentially explaining its reduced priority.

Alternatively, it could be that martech has become saturated and that most organisations are at a point where they have the martech they need and therefore have different priorities for their spending.



I don't believe there is an understanding of the value that martech brings to a business. This is due to a lack of understanding of the discipline of modern marketing and innovation. On a good day marketing is seen as an overhead, start adding platforms and tools and it's an unnecessary expense. Possibly from a marketing fault, there is a lack of reporting and educating upwards to truly see the value.

Colleen Fogerty, Partner Marketing and Business Development Leader at ATOS





The cutback on agencies could also end up resulting in negative consequences. According to research from IDG company, Foundry, **80%** of partner marketers agree that partner marketing programmes where they work with agencies yield greater results than those run in-house.



We are still using agencies to support our ecosystems marketing efforts. There are negatives that happen when you cut agencies – loss of specialist expertise, increased workload for internal team members, lack of scalability and flexibility as well as the risk of potential decline in campaign performance and therefore strained partner relationships. But there are also some short-term gains such as cost savings, greater control over brand messaging and faster decision making that some organisations might be seeking.

Heather Meltvedt, Director, Ecosystems Marketing EMEA & LATAM, Palto Alto



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The evolution of partner marketing teams



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Marketing never stands still. From the days of print ads and direct mail to today’s AI-driven strategies and obsession with ROI, it’s an industry built on reinvention.

One major shift during this time has been in marketing team structures, particularly in partner marketing. Once a dedicated, standalone function – albeit often considered the Cinderella of marketing, *as our previous research revealed* – the lines between partner and field marketing are now increasingly blurred. And this change has more serious consequences than just being the last team invited into the boardroom.

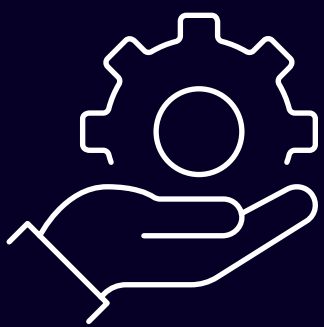
According to our research,

83%

of respondents report some degree of crossover between their field and partner marketing teams, meaning only

17%

of partner marketing teams remain completely independent.



But what is driving this shift, and what impact is it having on budgets, skills, and long-term success?



Blurring the lines

There are several reasons why the distinction between partner and field marketing is disappearing.

The first is budget constraints. Running two fully independent teams is costly, and many CMOs – who often have little to no direct experience with partner marketing – assume that content, creative, and campaigns can be shared between field and partner marketers with equally successful results.

Not only that, but with the constant pressure for marketing teams to do more with less, joining two teams enables greater cost efficiencies. This is combined with the fact that companies are relying more on centralised martech systems – CRM, analytics platforms, and automation tools – which enable them to jointly manage partner and field marketing activities.

However, this presents a contradiction, according to our research. Despite martech’s potential to make combined teams more efficient, investment in these tools remains surprisingly low, with only **2% of budgets allocated to martech**. But does this mean that teams are being merged without the proper technology support to enable real collaboration?

On a more positive note, it’s easy to forget how much partner marketing scope has expanded over the past decade. It’s no longer just about co-branding, demand generation and golf days. It now involves elements of alliances, enablement, Account-Based Marketing, and joint Go-To-Market strategies, which increasingly overlap with field marketing.



This combining of partner and field marketing teams is because of a lack of understanding of what goes on at a global level of partner marketing.

The alignment to the portfolio, the R&D commitments, the three-year vision and plan, the focus on the joint TAL (target account list). Creating joint messaging and content assets for campaigns, sales enablement, and bids must be done at that global level, the execution sits in field marketing. But to have partner marketing in the field creates a silo without scale. It’s confusing and in the end, you see the partner marketing function churning out events, swag and golf days.

Colleen Fogerty, Partner Marketing and Business Development Leader at ATOS





Another factor that accounts for this changing structure could be more strategic: knowledge transfer. Businesses recognise the risk of siloing partner marketing expertise within a small group of individuals. By integrating teams, they aim to spread this specialised knowledge across the broader marketing department, ensuring critical skills aren't lost and making partner marketing more accessible to the wider organisation.

But this then raises another concern: if partner marketing becomes consumed within broader marketing functions, could it lose C-level sponsorship? Without a clear advocate at the top, partner marketing priorities may be overshadowed by traditional marketing goals, diluting its impact and reducing long-term investment.



It's a balancing act for companies between a knowledge worker they can't do without and the c-suites who want to diffuse the risk through more people. This is happening across industry and sector. There is a big shift towards a more centralised style of risk management where skills are pooled. The challenge with this is you end up with a jack of all trades and a master of none.

Professor Shona Bettany, University of Huddersfield

(Partner marketers) can't get no satisfaction

But what impact is the shift in structure having – not just on individuals within these teams, but also on budgets and the skills needed for success? And are we at risk of partner marketing becoming a side hustle, with its specialised skill set fading as businesses prioritise broader marketing strategies?

According to our research, those who have completely independent partner and field marketing teams are more confident in their ability to succeed in the future, with **69%** being very confident in their ability in comparison to only **55%** of those working in collaborative teams. Combined, this suggests that having separate teams is better for partner marketer satisfaction and development.

This confidence gap can also be tied back to budget. Our research showed that those who felt there wasn't enough investment being made into partner marketing skills are almost twice as likely to have more collaborative teams (**74%**) than those who do feel there is enough investment (**32%**).

This could be for several reasons. Those in independent teams may have clearer role definitions and so can allocate resources more effectively. Independent teams may also have greater levels of budget autonomy, so can invest in the most impactful strategies without needing to balance field marketing's broader priorities. In turn, this means their spending is more targeted leading to higher impact and better results, which ensures goals are hit, and marketer satisfaction is greater.





The demise of partner marketing skills?

But beyond personal confidence, there's a bigger risk at play: is the integration of teams leading to a loss of specialised partner marketing skills?

Partner marketing is a distinct discipline with a very specific set of KPIs, including partner enablement, co-selling success, and ROI on MDF. These are very different to the more traditional field marketing goals, which tend to prioritise direct customer engagement and sales pipeline growth.

If partner marketing becomes part of a broader marketing function, will it still be measured using the right success metrics? And if not, how will partner marketers justify ongoing investment, if C-level executives fail to see direct ROI?

The shift toward integrated teams may offer short-term efficiency, but it raises long-term questions about partner marketing's structure, leadership and future investment. And, as partner marketing structures shift, do marketers have the expertise and skills needed to succeed in this new environment?

Our next chapter will reveal what attributes successful partner marketers need today and how these skills will change over the next five years.

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It's important we don't lose these skills and knowledge. It's not only partner marketers and partner managers who need to understand what drives partnerships and what benefits partnerships bring. From the vendor perspective, there's a gap in understanding the benefits to customers of working with a partner, the incremental business that a well-oiled vendor-partner relationship can bring, and the balance of different roles that a vendor and a partner fulfil in the eyes of, what are, joint customers.

Barnaby Wood, Director of Product Management, Arctera



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Skills today, gone tomorrow



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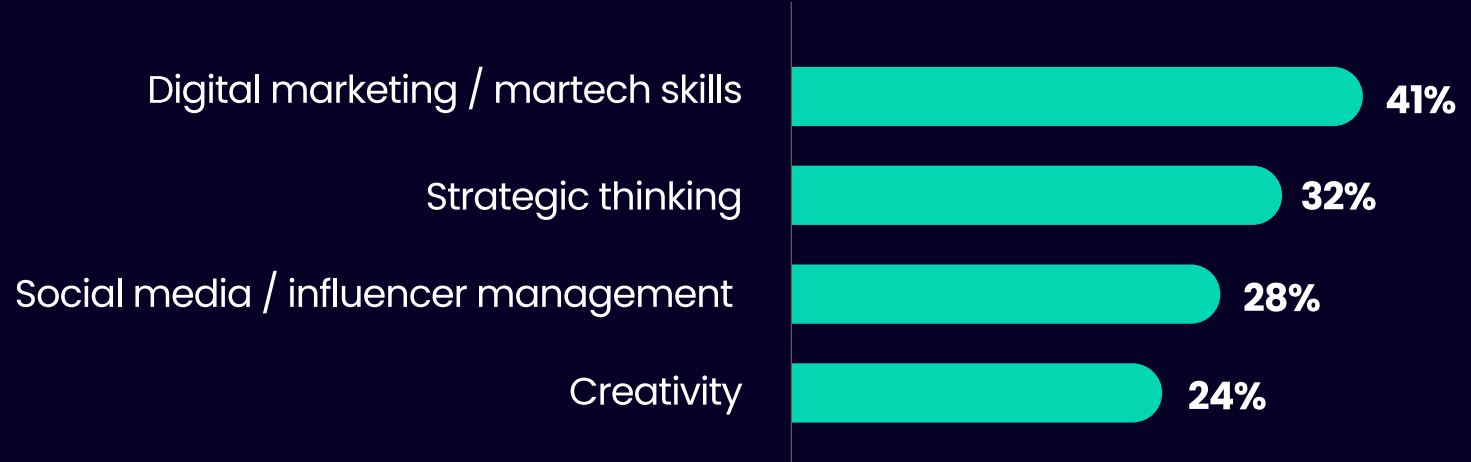
Although never appearing in the circus, partner marketers can juggle and balance with the best of them. The skillset required to become a successful partner marketer is both vast and varied – from negotiation to communication, and analytics and automation.

Partner markers must hold traditional marketing skills alongside a subset of additional capabilities that reflect the nuances of working within an ecosystem.

But what skills are specific to partner marketers, and how do these differ from field marketing skills?

According to our research, the top four skills needed for both partner and field marketing are digital/martec skills, strategic thinking, communications, and creativity, although our respondents ranked them in a different order for each role. These shared skills reflect core marketing capabilities, with technology playing alongside softer skills.

Top four partner marketing skills required to succeed today



Top four field marketing skills needed today





Blended skillsets

However, a closer look at the research reveals key differences that set successful partner marketers apart. For example, collaboration and negotiation are rated more highly among partner marketers than field marketers. *(See p25 for full skills breakdown)*

This is likely because partner marketers must negotiate co-marketing initiatives, align messaging across different companies, and manage multi-stakeholder relationships – all of which require strong interpersonal and relationship-building skills.

Further nuances emerge when we break down the data between independent partner

marketing teams and those in mixed field and partner teams. Respondents from independent partner marketing teams ranked digital marketing as the most important skill, whereas those in joint teams placed a higher emphasis on martech proficiency and strategic thinking.

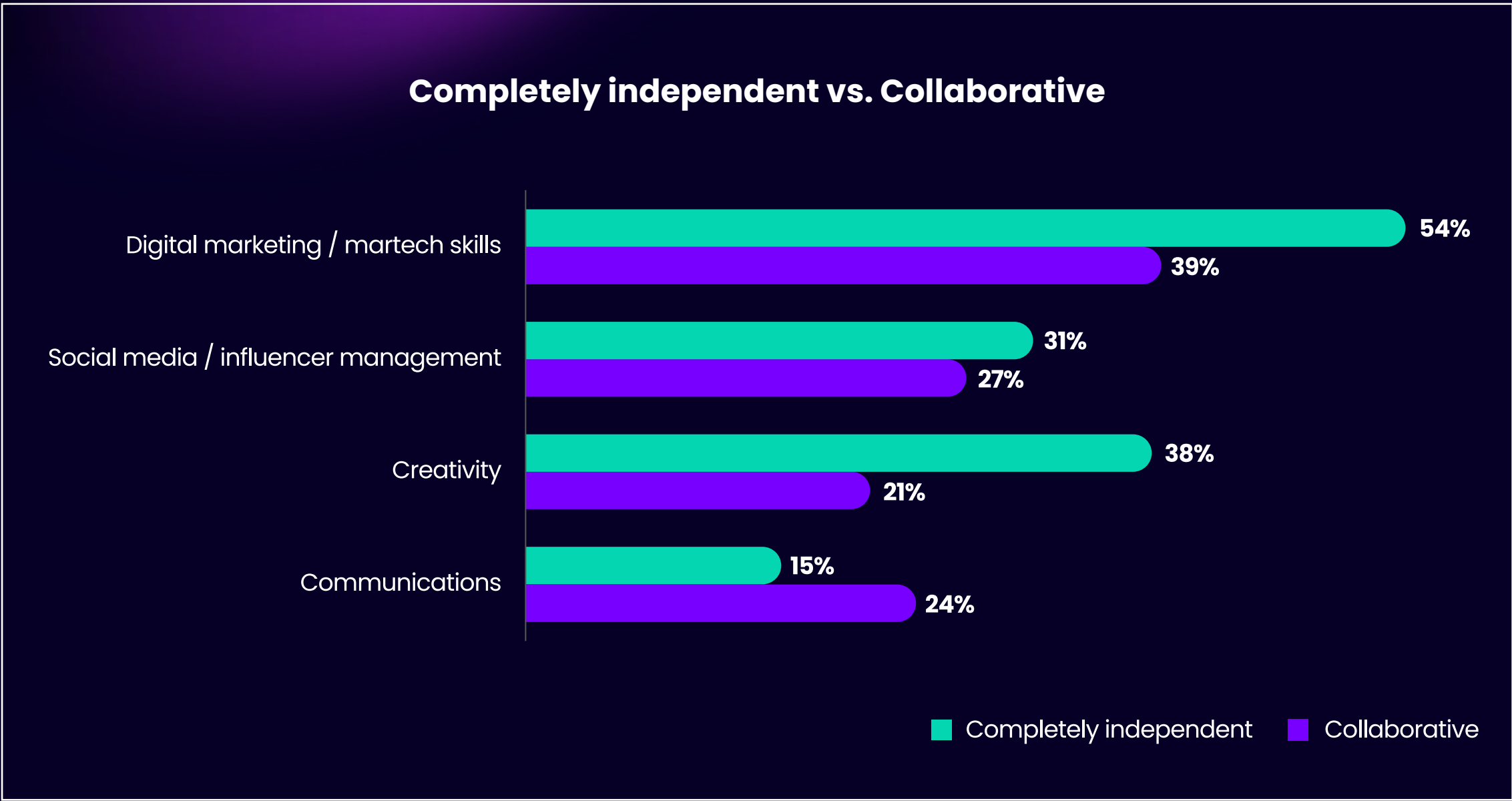
This suggests that when partner marketing functions operate separately, there is greater emphasis on innovative ideas that stand out. Independent partner marketing teams have more autonomy to produce creative campaigns and understand that their efforts must break through the noise to win mindshare in a busy ecosystem.

On the other hand, integrated teams prioritise technology and structured planning to align with broader marketing functions, and centralised marketing goals and KPIs.



A channel marketer acts very differently to a field marketer and that is because they have to be consultative. They have to understand their own business, their partners business and also their marketing domain. A field marketer is more about strategy, execution and alignment to sales which is increasingly more about leveraging AI, moving towards an ABM approach through traditional marketing and digital techniques.

James Houselander, Director of Marketing (EMEA) at HPE Aruba Networking





Partner marketers must be creative problem-solvers. Their success depends on developing compelling, co-branded content that lands with both partners and end customers. Because they don't engage directly with the audience, their content must speak for itself – engaging, visually impactful, and easy for partners to use.

Storytelling, adaptable messaging, and strong design are essential for making sure that partners not only understand the marketing materials but are motivated to use them.

Jo Dunkley, Co-Founder Coterie



Are we ready for AI?

Interestingly, emerging skills such as AI, automation, data and analytics ranked near the bottom of the list of skills both partner marketers and field marketers consider essential to succeed today. This trend holds true regardless of whether they are part of independent teams or joint field and partner marketing teams.

Ecosystem executives we spoke with suggested this could be because of the current uncertainty around AI. Most organisations are still experimenting with the technology, lacking a fully formed strategy for integrating it into their marketing functions.

Additionally, many partner marketers face a tension between creativity and AI. While they need to create standout content, some find that generative AI tools dilute their brand's tone of voice, making it harder to differentiate in a crowded market.



There is a huge hype around AI at the moment – and people are believing it. But partner marketers need to consider at what cost. Yes, it can help productivity and automation, but we know how important creativity is to successful partner campaigns and that has to come from a human.

Professor Shona Bettany,
Huddersfield University

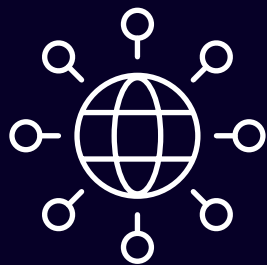




Partner marketing skills required to succeed today:



Field marketer skills required to succeed today:



Partner marketing today demands a blend of creativity, collaboration, and technical expertise to successfully navigate complex partner ecosystems – it’s what sets partner marketers apart from their field marketing colleagues.

But the landscape is shifting. While AI, automation, and data analytics may rank low among today’s essential skills, our research shows they will become significantly more important over the next five years. To stay ahead, partner marketers will need to adapt, develop new capabilities, and juggle an even broader skill set.



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Future skills: The rise of AI, automation, and data



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It doesn't take a crystal ball to predict the rise of AI in partner marketing. But partner marketing isn't just about new technology – it's about new skills. Our research revealed some surprising results about the skills partner marketers will need to keep pace with our fast-changing ecosystem.

The partner marketing skills required for success in the next five years have changed considerably from what they are today. Our research revealed that while martec and digital skills predictably remain top of the leaderboard, AI and automation skills rockets to the second highest skill going from **21%** up to **33%**. Close behind are digital marketing and Martech skills, along with social media and influencer management.

Partner marketing skills required to succeed in 5 years:



This reflects partner marketers increasingly using data to make smarter decisions, as well as the expectation of using AI to create more personalised content, streamline partner management, and automate marketing execution.

This shift could have a positive knock-on effect for partner marketers, according to the ecosystem executives we spoke with. Many said that senior executives place high value on the certainty that data provides, especially when it drives results and demonstrates ROI – something that has long been the Holy grail of partner marketing. With clear data to prove success, partner marketing could finally be elevated not just in the boardroom, but in budgetary terms too.





I am starting to see our teams and our partners talking more about how to use AI. I think perceptions are changing around how they can use AI and automation to benefit their role rather than it be seen as a threat. Fundamentally, we have been using AI and to a certain extent automation for years. However, it's the way that its being used that can be really beneficial. I think individuals need to continue to be trained on how to use AI, the platforms they have access to and the benefits they bring.

**James Houselander, Director EMEA Marketing
at HPE Aruba Networking**

Be more adaptable

While the top of the skills chart may not hold many surprises – AI is after all the buzzword of the year – one of the most interesting shifts in our research is the rise of adaptability as a key skill for partner marketers. While it currently ranks near the bottom of the skills needed to succeed today, it has jumped to seventh place in the skills ranking for the next five years.

This reflects the growing pace of change and the evolution of partner ecosystems. With AI and automation transforming the way we all work, and partner marketing teams facing shifts in structure and strategy, marketers must be more agile and adaptable than ever.

However, even more startling is the fact that when we break the research out into those respondents in independent teams and those in joint field and partner teams, adaptability is ranked as the highest skill required to succeed in partner marketing by those in independent teams over the next five years by **32%** – above AI and automation.

This not only demonstrates the pace of change that partner marketers feel is going to occur within this timeframe but also could be because independent teams are feeling more instability than joint teams. Often with leaner operations, these individuals must adapt strategies and pivot campaigns, to be able to react quickly to partner-driven needs.



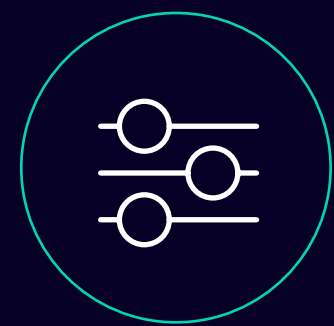
AI in, comms and negotiation out

Interestingly, while skills like AI and adaptability are rising in importance, creativity and negotiation have dropped to the bottom of the future skills list for partner marketers. This is compared to fifth and sixth place respectively in the skills partner marketers need today.

This key shift may be due to two key trends.



Firstly, partner marketers believe technology will do more of the heavy lifting in the future. With AI-powered content generation, automated reporting, and predictive analytics, marketers believe that they will increasingly be able to let data and automation drive decisions, reducing the reliance on traditional negotiation and personal communications.



The second reason could be that our ecosystem is maturing and becoming more structured. This would lead to partner marketing processes becoming more defined and automated, meaning there is less need for manual negotiation and ad-hoc communication. Instead, systems and frameworks will be in place to streamline collaboration.



In regard to how we handle AI in our company, we have built our own secure enterprise Gen AI service that supports multiple LLM models and integrates advanced security capabilities to ensure compliance with stringent data security standards.

Other AI apps can create blind spots, loss of sensitive data through uninspected prompts and responses, and malicious content generated by AI can compromise user safety, so as a leading cybersecurity vendor, we encourage our teams to utilise our own AI service.

Heather Meltvedt, Director, Ecosystems Marketing EMEA & LATAM, Palto Alto



While human connection will always be a factor in partner marketing, our data suggests that marketers are preparing for a future where AI and automation take a more active role in shaping relationships and executing campaigns.

However, the ecosystems executives we spoke with were less sure. Many believe that while AI will become part of the role, it will not be as dominant as some believe.



AI could be an interesting support to partner marketers. With the right background, prioritising partners, activities, and budgets could all be simplified and accelerated by working with AI tools, not to mention content creation [assistance]. However, it isn't the fix-all solution and the ability to understand partnership priorities, define joint plans and execute successfully with rigour still relies on effective communication. People continue to do business with people, and without communication and negotiation skills, partnerships likely bring less value.

Barnaby Wood, Director of Product Management, Arctera



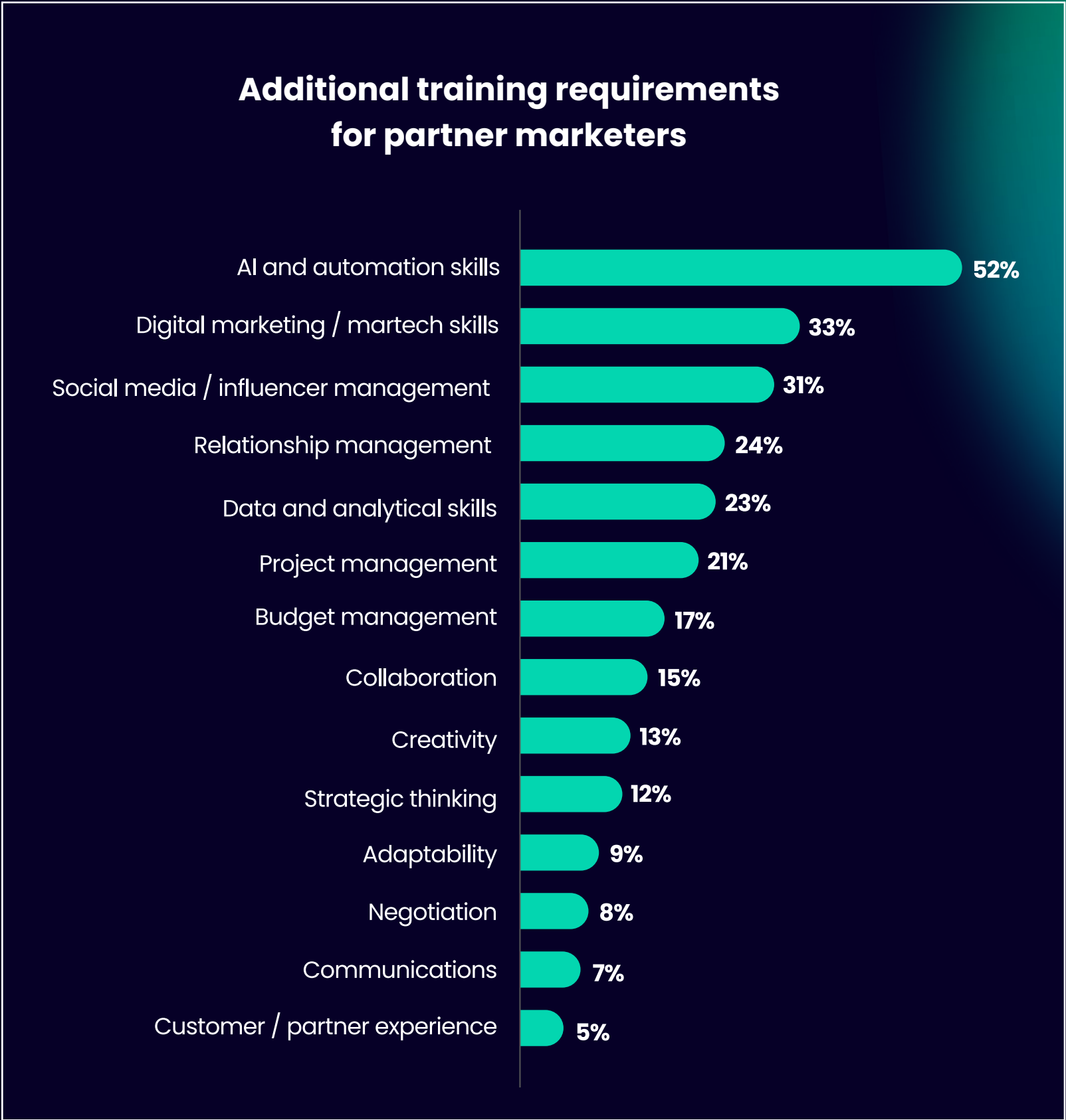
Train to gain

Despite recognising the need for AI and automation expertise, our research shows that many partner marketers feel unprepared for this shift, unsurprising given the infancy of adoption and successful use cases. This explains why partner marketers themselves are prioritising AI as the number one area for training.

The skills marketers believe are most critical for the future directly align with their biggest knowledge gaps, underscoring the need for more development opportunities in AI, automation, and data analytics. According to our research, partner marketers ranked training in AI and automation **(52%)** digital marketing and martech skills **(33%)**, as well as social media and influencer management **(31%)** as the top three areas they would like training.

When it comes to how marketers want to be trained, the preference is clear: face-to-face training remains the most sought-after format, with 56% of respondents favouring in-person sessions. This suggests that while AI and automation dominate the conversation, the irony is marketers still value human interaction and hands-on learning when it comes to acquiring new skills.

The challenge for most organisations now isn't just recognising the skills they need, it's having the funding and ability to invest in the right training to bridge the gap.





AI, automation, and data might be shaping the future of partner marketing, but it's not just about keeping up with the tech, it's about making sure partner marketers have the right skills to use it effectively.

But these skills won't develop overnight, and the impetus must be on organisations to seek out the training their partner marketers need, in a way that best suits them – whether that's face-to-face, modular bite sized self-service or something more hand on like mentoring or community memberships.

Helen Curtis, Co-Founder, Coterie





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Conclusion

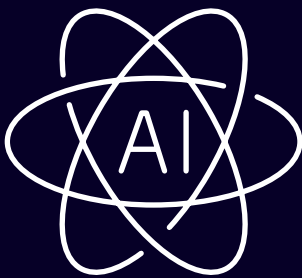
We are on the brink of a new era. Ecosystems are becoming more complex, and technology – especially involving AI – is already profoundly impacting how partner marketers operate. Coupled with geopolitical and fiscal uncertainty, and rising expectations from leaders, stakeholders and customers, partner marketers need to be ready to adapt their skills to succeed in this new world.

That’s the overriding message from our research. Traditional skills such as communication and negotiation are making way for new skills requirements in AI, automation, and data-driven decision-making. Yet, even as technology takes a bigger role in execution, the human element of partner marketing remains just as critical.

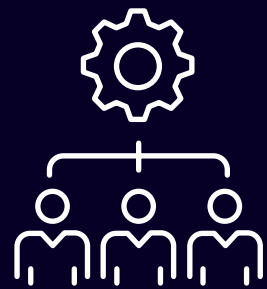
One of the biggest takeaways from our research is the increasing importance of adaptability. While AI and martech skills are rising to the top of the skills agenda as we head to 2030, adaptability has seen one of the most significant jumps in priority, particularly for those working in independent partner marketing teams.

This reflects the growing unpredictability of the partner landscape, where marketers must navigate constant change, shifting strategies, and evolving relationships. Independent teams, often working with leaner resources and fewer structured processes, recognise that flexibility and the ability to pivot are just as valuable as technical proficiency.

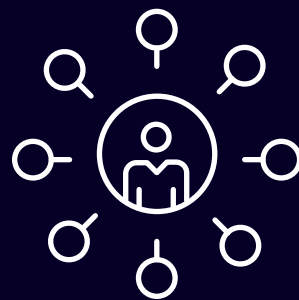




At the same time, AI and automation are no longer just future trends, they are becoming fundamental to how partner marketers already operate. The ability to use AI for personalisation, content creation, campaign automation, and partner management is quickly moving from an emerging skill to a required competency. But this rapid pace of AI adoption is creating a knowledge gap.



Marketers understand that AI will transform their roles, yet many feel unprepared to integrate it effectively into their strategies, according to our research. That's why AI and automation training are now the most in-demand areas for partner marketers, reinforcing the need for businesses to prioritise education and upskilling.



Interestingly, the rise of AI coincides with a decline in traditional partner marketing skills. Communication and negotiation, once seen as essential, have dropped significantly in importance, according to our research. Yet, while automation will bring efficiency, many ecosystem executives remain sceptical that AI will replace the interpersonal skills that underpin successful partnerships. After all, golf days and post-meeting drinks in the pub are still linchpins of our environment.





Partner marketing, at its core, is still about relationships, and those who can balance technological expertise with human connection will have the edge.

One example of where this human contact is still vital is highlighted in the way partner marketers want to address their skills gap. Our research shows that marketers overwhelmingly prefer face-to-face training, demonstrating that they value the interaction and practical experience that in-person learning delivers.

Around **70%** of all IT revenue flows through partners, and sales through the channel continue to outpace direct sales. Investing in this ecosystem will pay dividends, and yet over a third of respondents in our research don't believe enough investment is being made in training.

As Richard Branson once noted to a colleague who was bemoaning investing in training: "But what if we train them and they leave?" said the exec. Branson's reply: "But what if we don't, and they stay?"

The partner marketing landscape is shifting rapidly, and the next five years will bring even more transformation. Those who embrace AI, sharpen their data skills, and stay adaptable will lead the charge.

But success won't come from technology alone. The future of partner marketing belongs to those who can integrate digital expertise with strategic thinking, creativity, and the ability to build meaningful relationships – golf days included. The challenge now is ensuring that partner marketers have the skills, training, and support they need to thrive in this new era.





07

Methodology



Methodology

The aim of this research was to explore the current landscape of partner marketing budgets and investments, while also examining the intersection between partner marketing and field marketing in terms of team structures and the skill sets required for success in both roles.

Quantitative research

Coterie partnered with Sapio to conduct interviews for this research report.

Sapio, an independent b2b research firm based in London, interviewed 75 Partner marketers in the South Africa via an online survey in early 2025. Participants were invited via email, and the sample was selected from online partner panels.

The results are subject to a sampling variation of ±9.8 percentage points at a 95% confidence level.

Research powered
by Sappio



Introduction

Money matters; the ups and downs of partner marketing budgets

The evolution of partner marketing teams

Skills today, gone tomorrow

Future skills: The rise of AI, automation, and data

Conclusion

Methodology



Demographics

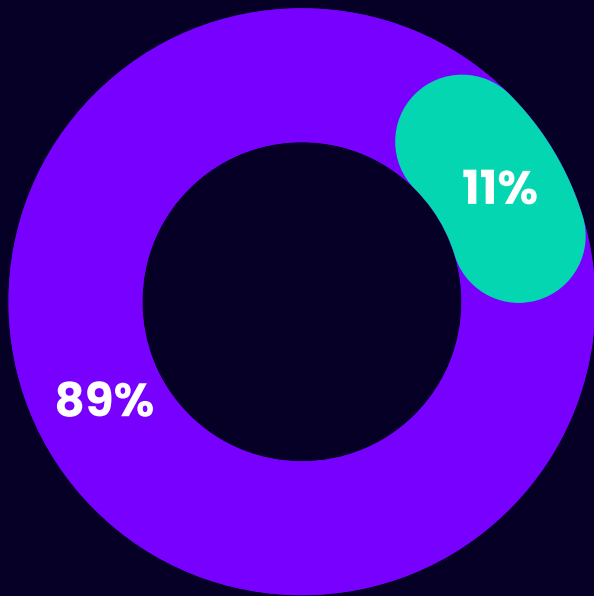
Seniority:

Role	% of respondents
Owner	13%
C-Level Executive	8%
Senior Manager / Director	32%
Manager	37%
Non-managerial role	9%

Company size:

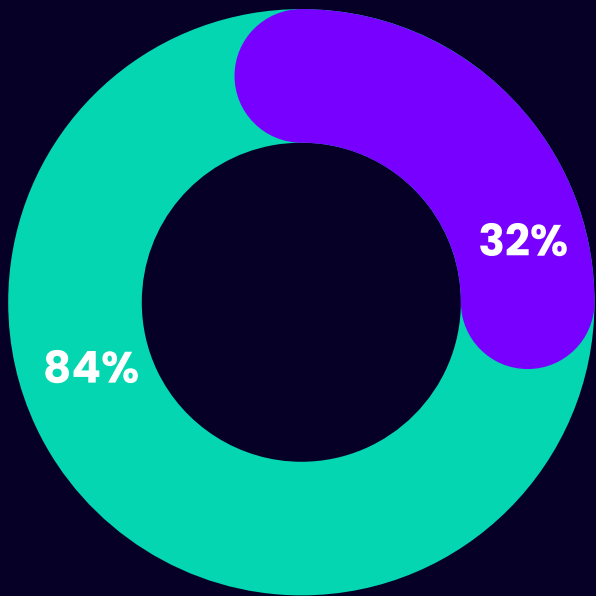
No. of employees	% of respondents
1 - 249	60%
250+	40%

Role in marketing:



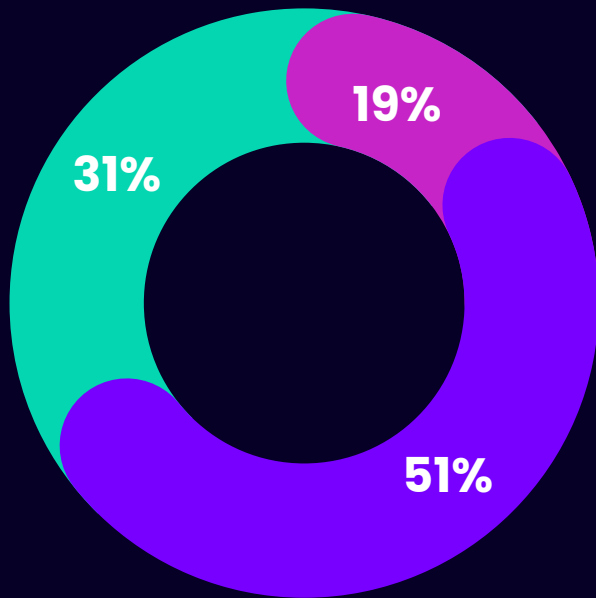
- Marketing is a significant part of my role
- My role is marketing-specific

Involvement in marketing:



- I am involved in marketing to and through partners
- I am involved in marketing to and through partners as well as field / end-user marketing

Year of experience in marketing campaigns:



- 3 to 5 years
- 6 to 10 years
- More than 10 years

Country of residence:



75



Qualitative research

This research was combined with qualitative research in the form of interviews conducted by a former journalist. Each participant was interviewed and a varying set of questions asked in order to get a diverse range of thoughts, ideas and answers.

Our panel of experts for these interviews is below:



Barnaby Wood,
Director of Product Management, Arctera



James Houselander,
Director of Marketing (EMEA) at HPE Aruba Networking



Colleen Fogerty,
Partner Marketing and Business Development Leader at ATOS



Jo Dunkey,
Co-Founder Coterie



Heather Meltvedt,
Director, Ecosystems Marketing EMEA & LATAM, Palto Alto



Professor Shona Bettany,
Huddersfield University



Helen Curtis,
Co-Founder Coterie



Let's talk.

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