

The B2B Marketing Benchmark: Regional Cut

The state of B2B marketing in
Asia Pacific | Europe, Middle East
& Africa | Latin America-Brazil |
North America

October 2023

LinkedIn



To understand the evolving landscape and opportunity in B2B, we surveyed B2B leaders in eight countries.

These countries represent core B2B growth markets with a vibrant LinkedIn member base.



Our perspective is backed by data from Ipsos and LinkedIn.

Primary quantitative research was conducted by Ipsos via a device-agnostic online survey, designed with each market in mind. LinkedIn internal data provided critical context and understanding to Ipsos' quantitative findings.

Research Methodology

Ipsos recruited a sample of 1,954 B2B Leaders from various industries.

Participants took a 15-minute device agnostic survey on mobile or desktop.

Survey development drew from existing Ipsos expertise as well as findings from LinkedIn research. The focus of the survey was challenges being faced by senior-level B2B marketers globally. The large sample size allows for confident projection of results and analysis of subgroups of the target audience.

We also did an analysis of 1,000 B2B Brands to understand how B2B companies are faring in this environment. We used our B2B Index, a new LinkedIn metric that measures effective brand building, to identify the 1,000 B2B companies we could analyze in aggregate to determine B2B trends on LinkedIn.

Data Collection Timeline

March 24 to May 5, 2023

Qualifying Criteria

B2B Marketing Leaders and CFOs at B2B organizations working in Advertising, Marketing & Communications, General Management, Client Services/Account Management, Sales, Finance, Analytics/Data roles at small (10-49 employees) n=231, medium (50-499 employees) n=806, and large (500+ employees) n=917 enterprises.

Respondent Profile

- **Regions:** North America (n=350), LATAM (n=200), EMEA (n=904), APAC (n=500)
- **Job title:** C-suite, including CMOs and CFOs (n=751), Senior manager/Director/VP/President (n=1,203)
- **Industries:** Financial services (n=346), Tech (n=443), Agency (n=400), Health (n=226), Education (n=259), Professional services (n=283)

Analytical Groups and Total Sample Breakdown

Our results analyze the responses of three key groups: B2B leaders, B2B marketing leaders and C-suite executives.

Mentions of **B2B leaders** refer to the full sample of respondents (CMOs, CFOs and senior marketers).

Mentions of **B2B marketing leaders** refer to CMOs and senior marketers, which represent 81% of the total sample.

Mentions of **C-suite** refer to CMOs and CFOs, which represents 38% of the total sample.

Market	Total Surveyed	CMOs	% of Total Sample	Sr. Marketers (Sr. Manager, Director, Sr. Director, VP, SVP, President)	% of Total Sample	CFOs	% of Total Sample	B2B Marketing Leaders	% of Total Sample	C-suite	% of Total Sample
Total	1,954	374	19%	1,203	62%	377	19%	1,577	81%	751	38%
U.S.	350	50	14%	250	71%	50	14%	300	86%	100	29%
UK	351	51	15%	250	71%	50	14%	301	86%	101	29%
France	277	46	17%	178	64%	53	19%	224	81%	99	36%
Germany	276	52	19%	174	63%	50	18%	226	82%	102	37%
Singapore	150	29	19%	88	59%	33	22%	117	78%	62	41%
Australia	150	46	31%	62	41%	42	28%	108	72%	88	59%
India	200	50	25%	100	50%	50	25%	150	75%	100	50%
Brazil	200	50	25%	101	51%	49	25%	151	76%	99	50%

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Spotlight**

Key Findings

In helping their companies flourish in such a difficult environment, B2B marketing leaders face a tough road ahead. But they are resilient and up to the challenge. During the past few years, B2B marketing leaders have found new ways to drive influence, impact and growth across their organizations.

1. Base size: n=1954
BUDGETCHANGEFUTURE: How do you predict your (top client's) company's B2B marketing budget will change one year from now?
2. Base size: Total (n=1954); APAC (n=500)
OUTLOOK: Which of the following best describes how you feel about the likelihood of whether your marketing team's efforts will drive business revenue in the next year?
BUDGETCHANGE PAST: How would you describe the change in your [top client's] company's B2B marketing budget compared to one year ago?
3. Base size: LATAM (n=99)
CMOROLECHANGE: In which of the following ways has your/the CMO's role changed in the last two years?
CMOATTITUDES: Please indicate how much you agree or disagree with each of the following statements.
4. Base size: n=1577
BRANDIMPORT: When thinking about your brand-building efforts, please indicate how much you agree/disagree with the following statements.

- 1 B2B marketing budgets are up, a finding that's largely consistent worldwide.
While some minimal differences exist, **B2B leaders across regions expect budgets and spending to increase in the coming years.**
- 2 B2B leaders are hopeful about driving revenue in the future, particularly in APAC.
Around half of B2B leaders say they are optimistic they will be able to drive revenue in the coming year. B2B leaders in the APAC region are especially optimistic about the future and are excited about emerging technologies as well as additions to existing B2B marketing tools. This optimism may be fueled by increasing budgets, which are higher in APAC than in other regions.
- 3 LATAM illustrates how CMOs worldwide are rising in influence.
Between the expanding role of the CMO in business intelligence decision-making and the intentional skill-building to demonstrate the impact of brand building, B2B CMOs in LATAM are poised to be at the forefront of technology adoption and preparedness for future challenges.
- 4 B2B organizations across the globe are recognizing the importance of brand. Especially in APAC and NAMER.
Globally, roughly **6 in 10 B2B marketing leaders say their C-suite has increased the importance of brand building** given economic conditions. Additionally, B2B marketing leaders are reporting increased spending on growing brand awareness.

Key Findings

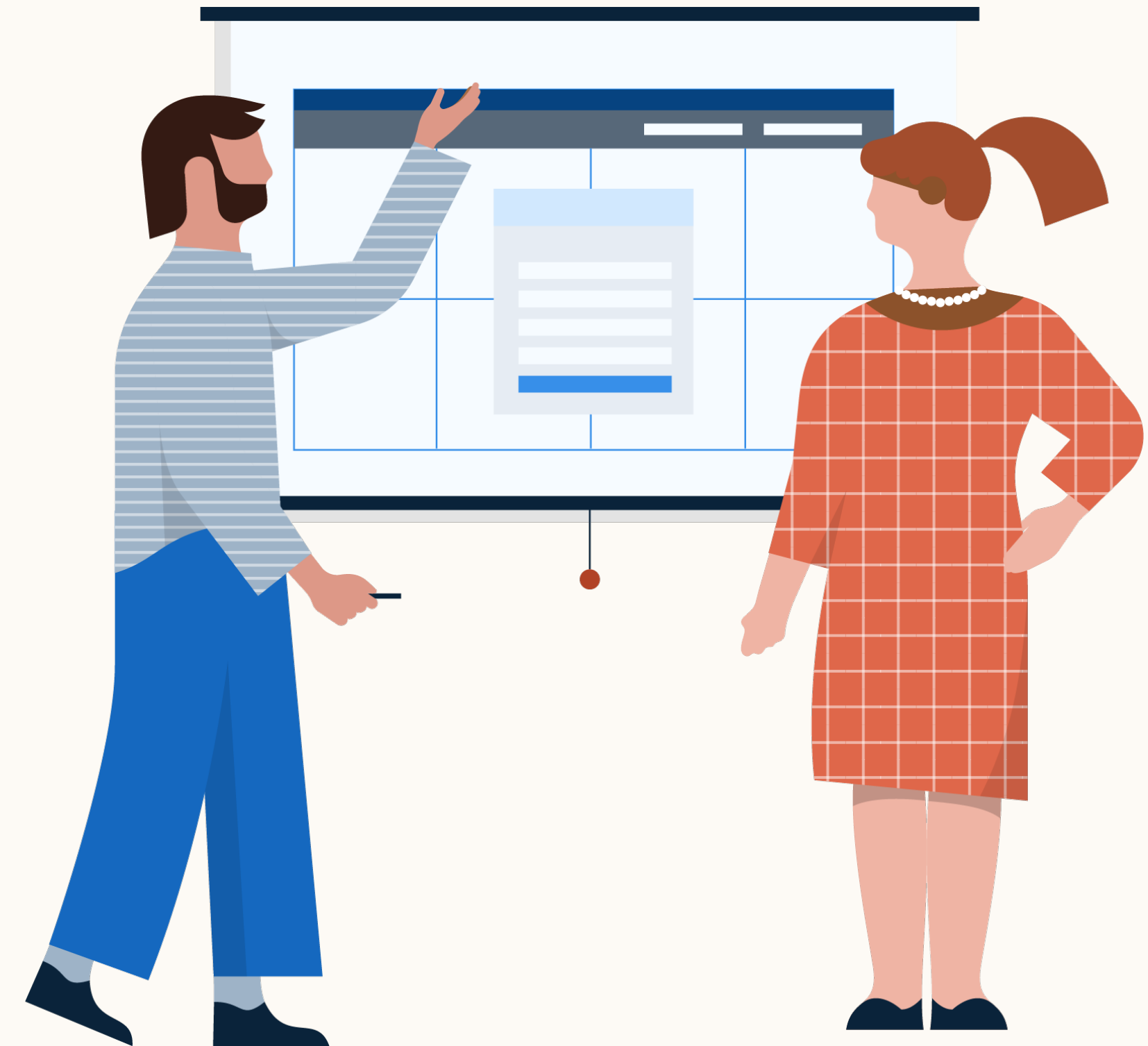
In helping their companies flourish in such a difficult environment, B2B marketing leaders face a tough road ahead. But they are resilient and up to the challenge. During the past few years, B2B marketing leaders have found new ways to drive influence, impact and growth across their organizations.

5. Base size: n=751
SELFSKILLIMPORT: In your opinion, which of the following skills are most important for you in your current role?
6. Base size: NAMER (n=350)
BUDGETALLOCATION: Please rank the following objectives in order of how much of your [top client's] B2B marketing budget is allocated to each, with 1 being the largest portion of the budget and 4 being the smallest
7. Base size: NAMER (n=127)
AIUSES: Thinking about the various uses of generative AI for B2B marketing, which, is your [top client's] business currently using?
Base size: APAC (n=375)
AIUSES FUTURE: Which, if any, of the following would your top client/you consider using generative AI for in the next year?
8. Base size: EMEA (n=749)
TOPCHANNEL: In your opinion, which channel is most effective at meeting your [top client's] needs?
Base size: EMEA (n=751)
SOCIALPLATFORM: Which of the following social media platforms have your top client/you used for B2B marketing in the past year?
9. Base size: NAMER (n=245)
DEIIMPORTWHY: Please select any of the following reasons why DEI is very/somewhat important to you.

- 5 B2B marketing leaders are using creative skills to succeed in EMEA. B2B marketing leaders in EMEA have an entrepreneurial mindset and are focused on upskilling. Almost 7 in 10 marketers say **creative strategy and execution** is the top skill required for their roles.
- 6 B2B leaders in NAMER are focused on a full funnel approach in an uncertain environment. While B2B leaders cite **lead generation and generating new business** as top areas of budget allocation and spending, they also plan to prioritize branding and demand generation.
- 7 B2B leaders in NAMER and APAC are focused on integrating generative AI into their marketing toolkits. B2B leaders in NAMER report the **highest usage of AI to gain a competitive advantage (43%)** compared to other regions. Meanwhile, 1 in 3 B2B marketing leaders in APAC plan to integrate generative AI in the marketing mix in the near future.
- 8 B2B marketing leaders in EMEA are focused on making connections with thought leadership content and video. **Thought leadership is the top marketing tactic in EMEA in conjunction with LinkedIn usage**, significantly higher than in any other region. What's more, marketers in EMEA plan on boosting video use in the next year
- 9 DEI and accessibility is top of mind for B2B leaders in NAMER. Almost **7 in 10 B2B leaders say DEI provides greater perspective for better decision-making**, significantly more than other regions.

Amid uncertainty, optimism

Budgets are up worldwide and B2B leaders are feeling optimistic about their ability to drive revenue for their companies.



B2B Leaderboard: Top Global Brands

Leveraging [LinkedIn's B2B Index](#), The B2B Leaderboard identifies a distinct cohort of B2B companies worldwide that excel at brand building.

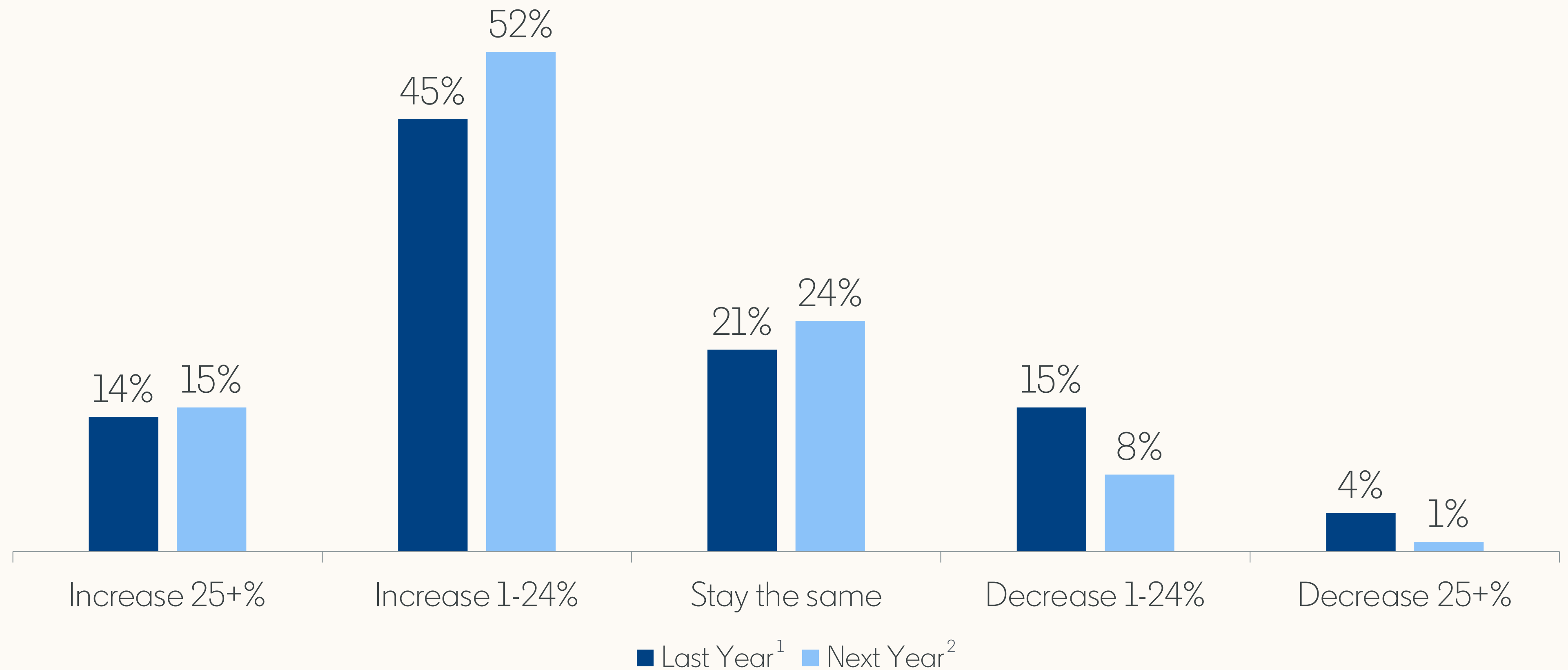
By examining factors such as creativity, distribution and investment, we generate a composite score for every organization in the B2B Index. This allows us to build a comprehensive and comparable assessment of effective B2B brand building for companies within the same industry.

Not just one, but four regional lists (APAC, EMEA, LATAM-Brazil, NAMER) complement a singular global index, underscoring these brands' diverse and widespread influence.





Global B2B Budget Changes



1. Base size: n=1954
BUDGETCHANGE PAST: How would you describe the change in your company's / your top client's B2B marketing budget compared to one year ago?

2. Base size: n=1954
BUDGETCHANGE FUTURE: How do you predict your company's / your top client's B2B marketing budget will change one year from now?

Research conducted by Ipsos, March 2023 to May 2023.

“The best revenue generating campaigns are also those that are the most unconventional. When we’ve run some tests that could have been seen as ‘risky’, the performance was usually better than for conventional campaigns.”¹

Director, UK

Over 6 in 10 B2B marketing leaders say their companies have increased spending on growing brand awareness.²

- Globally, 59% of B2B marketing leaders say their C-suite has increased the importance of brand building given economic conditions.
- A significantly higher percentage of CFOs believe their company has the right creative skills on their marketing team to support brand building efforts, compared to CMOs (79% vs 68%).

1. Base size: n=1735
CSUITEOE: What is the one thing you would like your (top client's) C-suite to know about what your team brings to the table?

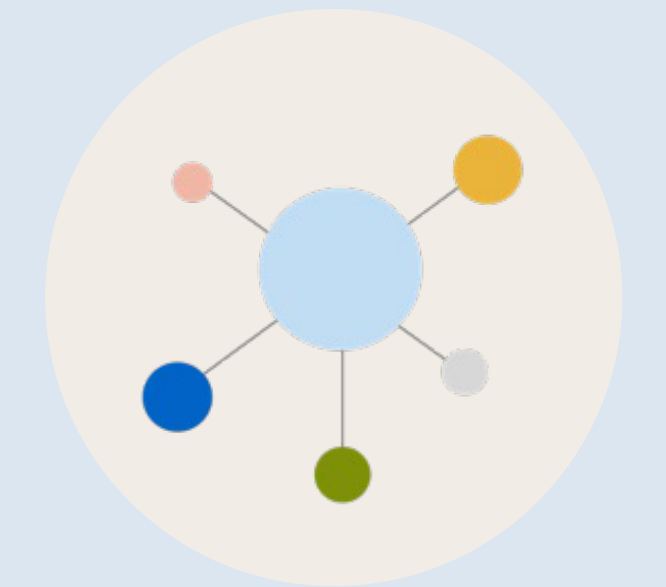
2. Base size: Total (n=1577); CFO (n=377); CMO (n=374)
BRANDIMPORT: When thinking about your brand-building efforts, please indicate how much you agree/disagree with the following statements.

But despite B2B marketing organizations' broad support and understanding of brand building efforts, B2B marketing campaigns still favor product promotion over brand building.



62%

Product Promotion



37%

Brand Building

Base size: n=1577
CAMPAIGNSTYPE: Of the campaigns your top client runs/you run, which of the following are more common?

Research conducted by Ipsos, March 2023 to May 2023.

95-5 Rule: Future customers are the source of your future cash flows

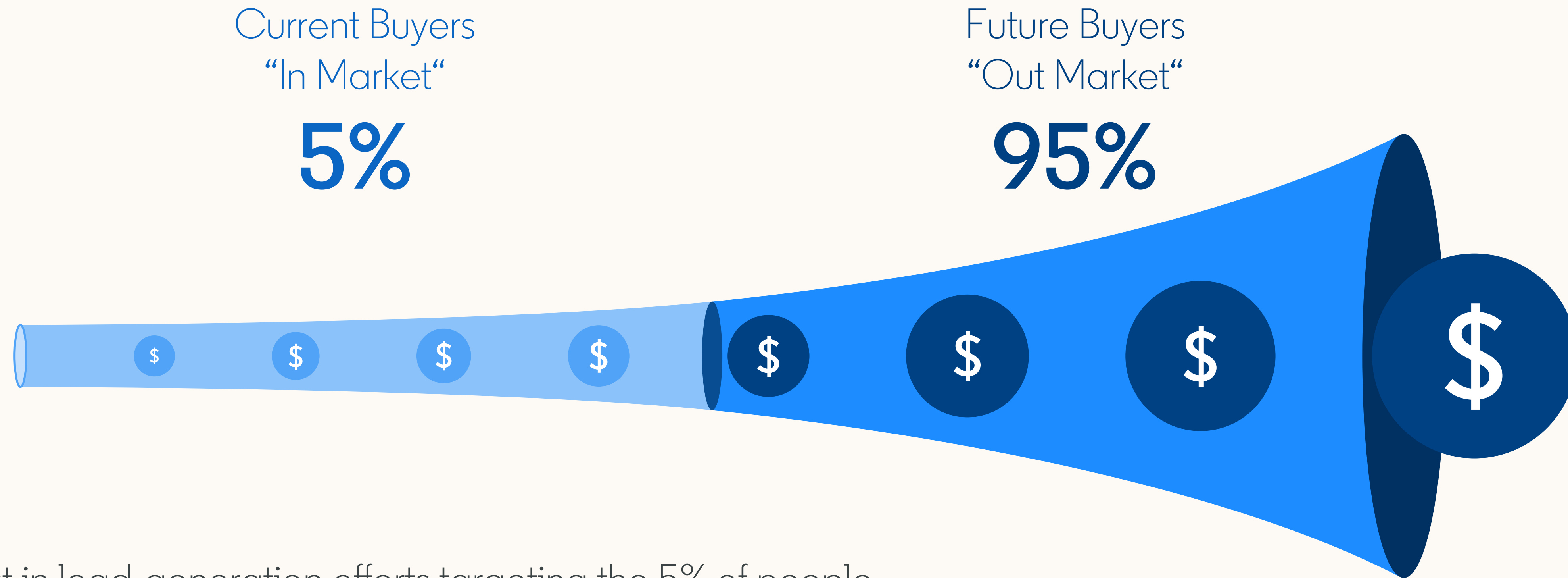


Considering the 95-5 rule, which posits that **95% of B2B buyers** are out-of-market and won't be in the market for months — or even years, this is not an ideal balance.

To be remembered in a buying situation, prospects must see your advertising long before they enter the market.

This means that advertising to the **95% of out-market buyers** — people who won't buy today but are likely to buy in the future — is critical.

Follow the 95-5 Rule to Grow



Invest in lead-generation efforts targeting the 5% of people who are “in-market” today, but don’t forget to invest far more heavily in reaching the entire category with brand advertising that resonates with future buyers, thus generating future cash flows.

“There is no [failsafe] for weathering an economic downturn in demand generation. Rather, teams need to work to optimize everything – often in small ways.”¹

Senior Manager, Tech, U.S.

The Top Trends Shaping Global B2B Budget Allocation and Spend

B2B leaders are looking at the full funnel in their prospecting efforts to ensure success.

- Although Lead Generation (36%) receives the highest share of B2B budget allocation, B2B leaders are also allocating budget to Brand Building (30%) and Demand Generation (20%).²
- Overall, 7 in 10 B2B leaders say their budget is focused on generating new business.³
 - Tech sector (85%) more likely than Agencies (72%), Financial Services (70%), Professional Services (68%), Health (67%) or Education (59%) to allocate budget to generating new business.

1. Base size: n=1735
CSUITEOE: What is the one thing you would like your (top client's) C-suite to know about what your team brings to the table?

2. Base size: n=1954
BUDGETALLOCATION: Please rank the following objectives in order of how much of your (top client's) B2B marketing budget is allocated to each, with 1 being the largest portion of the budget and 4 being the smallest.

3. Base size: Total (n=1954); Tech (n=443); Education (n=259); Financial Services (n=346); Health (n=226); Professional Services (n=283) Agency (n=400)
BUDGETALLOCATIONCU.S.TOMER: Now, please rank the following types of business in order of how much of your (top client's) B2B marketing budget is allocated to each, with 1 being the largest portion of the budget and 2 being the smallest.

Asia Pacific Spotlight

The B2B Leaders in the APAC region are optimistic about the future and are excited about upcoming technologies and additions to existing B2B marketing tools.



B2B Leaderboard Top Brands in Asia Pacific

Leveraging [LinkedIn's B2B Index](#), The B2B Leaderboard identifies a distinct cohort of B2B companies worldwide that excel at brand building.

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Not just one, but four regional lists (APAC, EMEA, LATAM-Brazil, NAMER) complement a singular global index, underscoring these brands' diverse and widespread influence.

Lenovo

mahindra

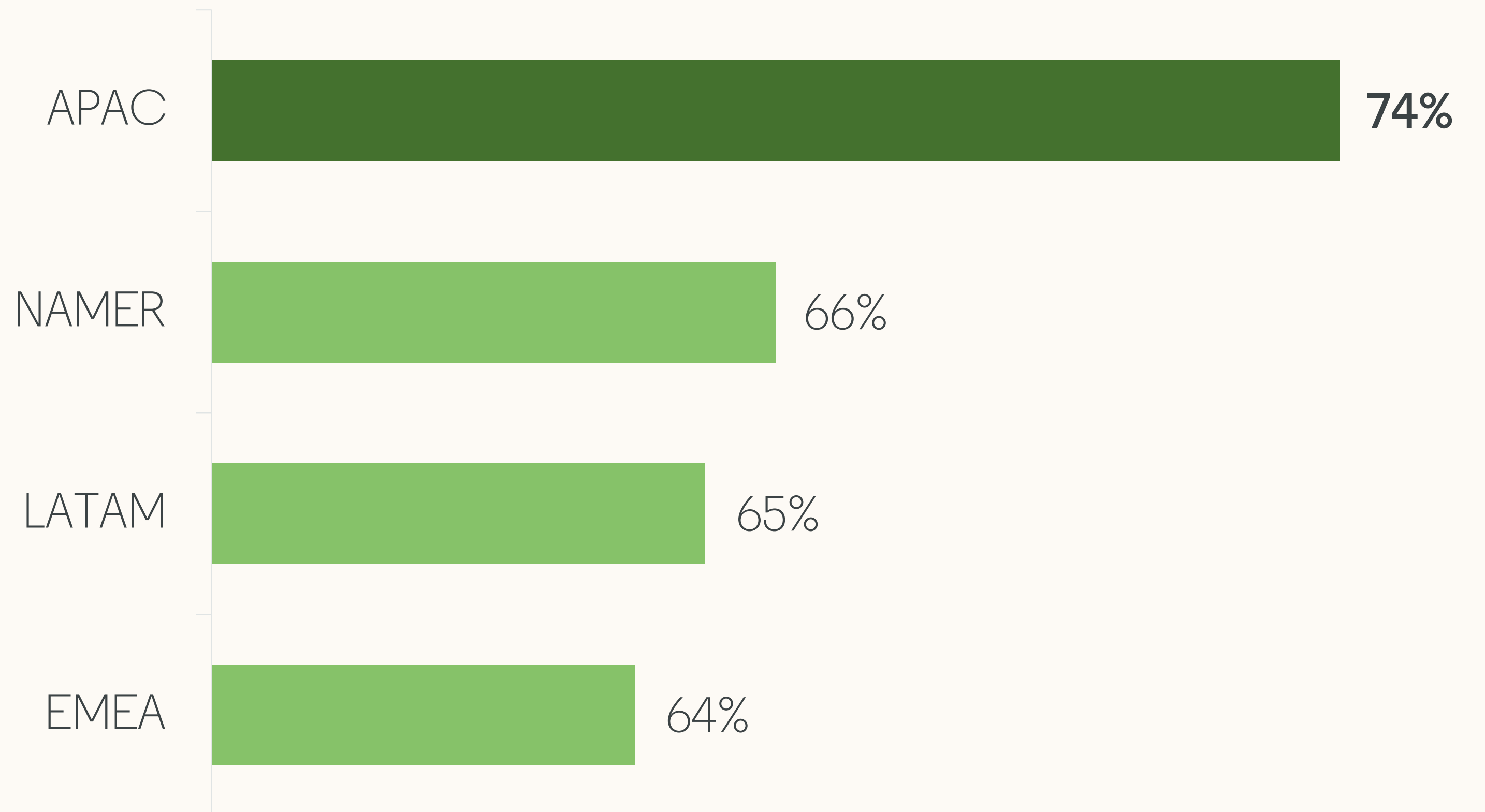
NTT DATA

TikTok for Business

While expectations around increasing budgets exist across all regions, they are significantly higher in APAC.



B2B Budget Increases Next Year – Regional



Base size: APAC (n=500); NA (n=350); LATAM (n=200); EMEA (n=904)

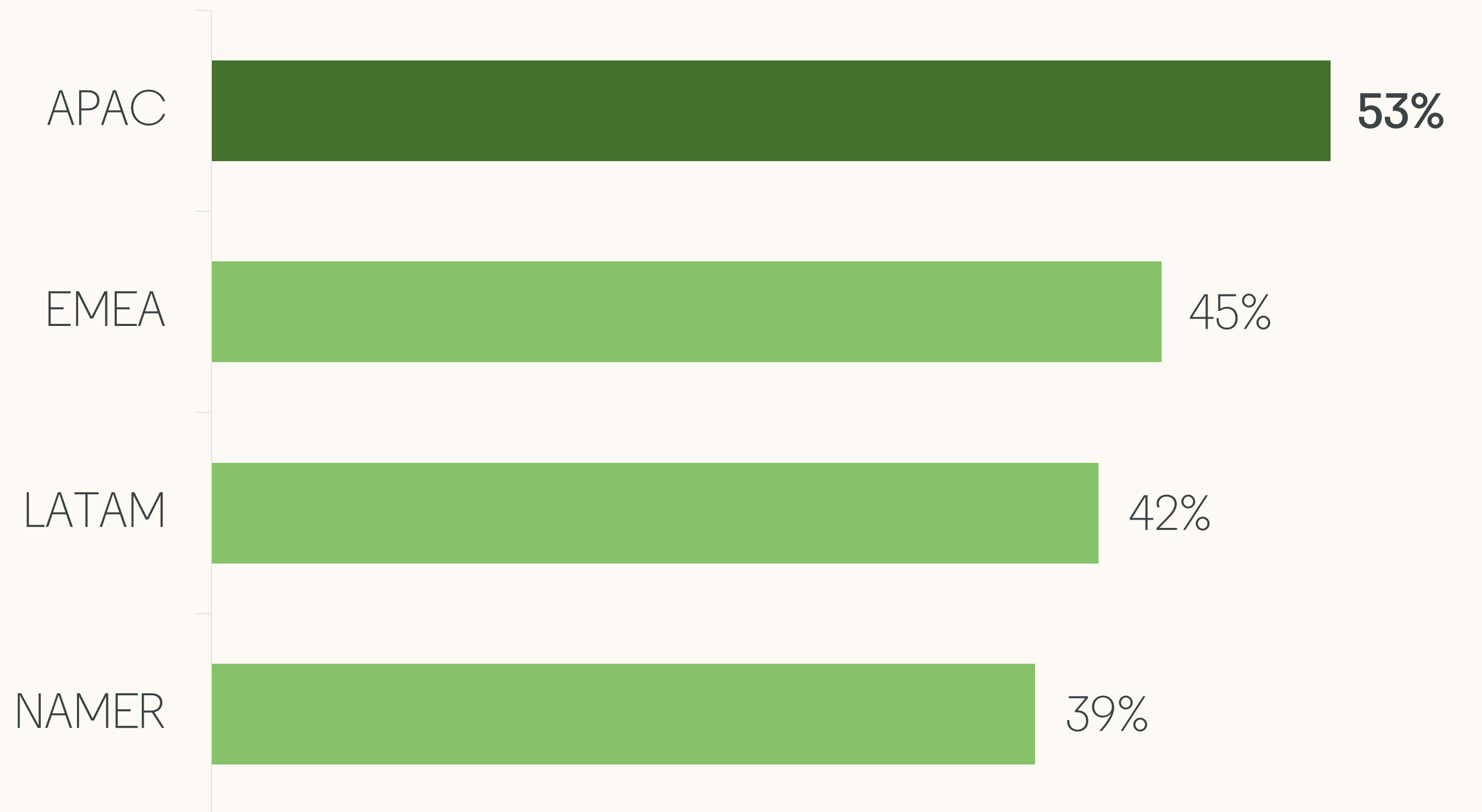
BUDGETCHANGE PAST: How would you describe the change in your [top client's] company's B2B marketing budget compared to one year ago?

Research conducted by Ipsos, March 2023 to May 2023.

B2B Marketing Leaders in APAC say **new tech adoption** is one of the most important current skills for their marketing team.



B2B Budget Increases Next Year – Regional



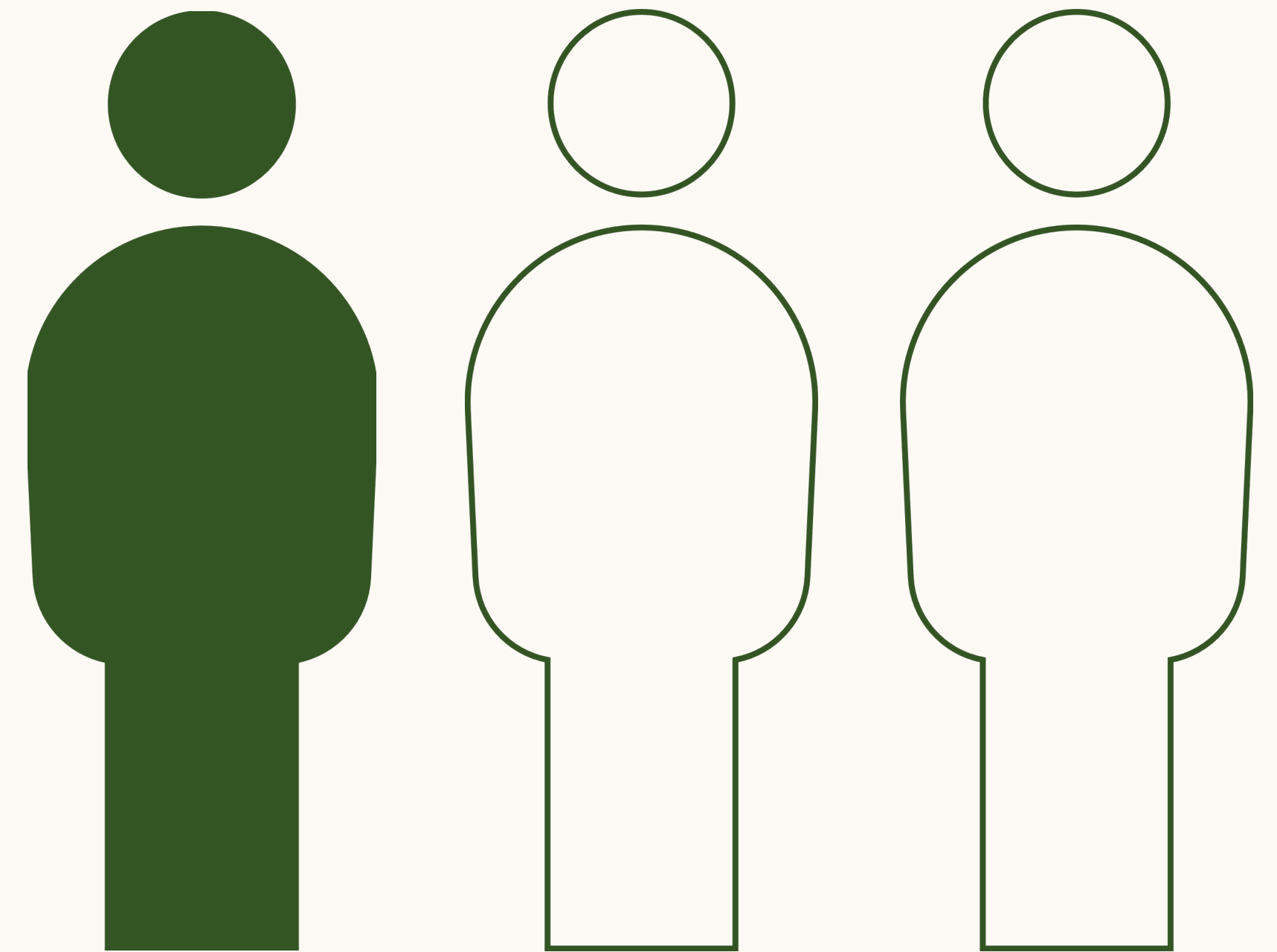
Base size: APAC (n=375); NA (n=300); LATAM (n=151); EMEA (n=751)

TEAMSKILLIMPORT: In your opinion, which of the following skills are most important for members of your team who report to you/members of the B2B marketing team?

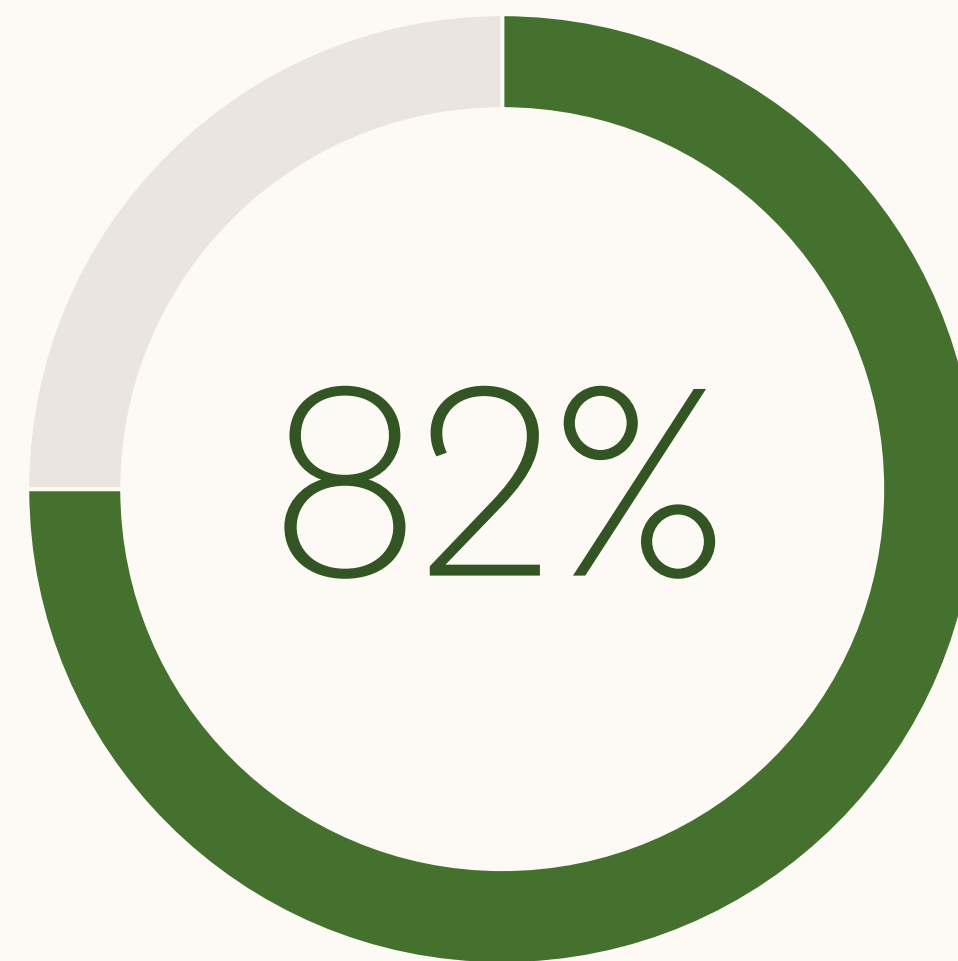
Research conducted by Ipsos, March 2023 to May 2023.

Many B2B marketing organizations in APAC are thinking about leveraging AI applications.

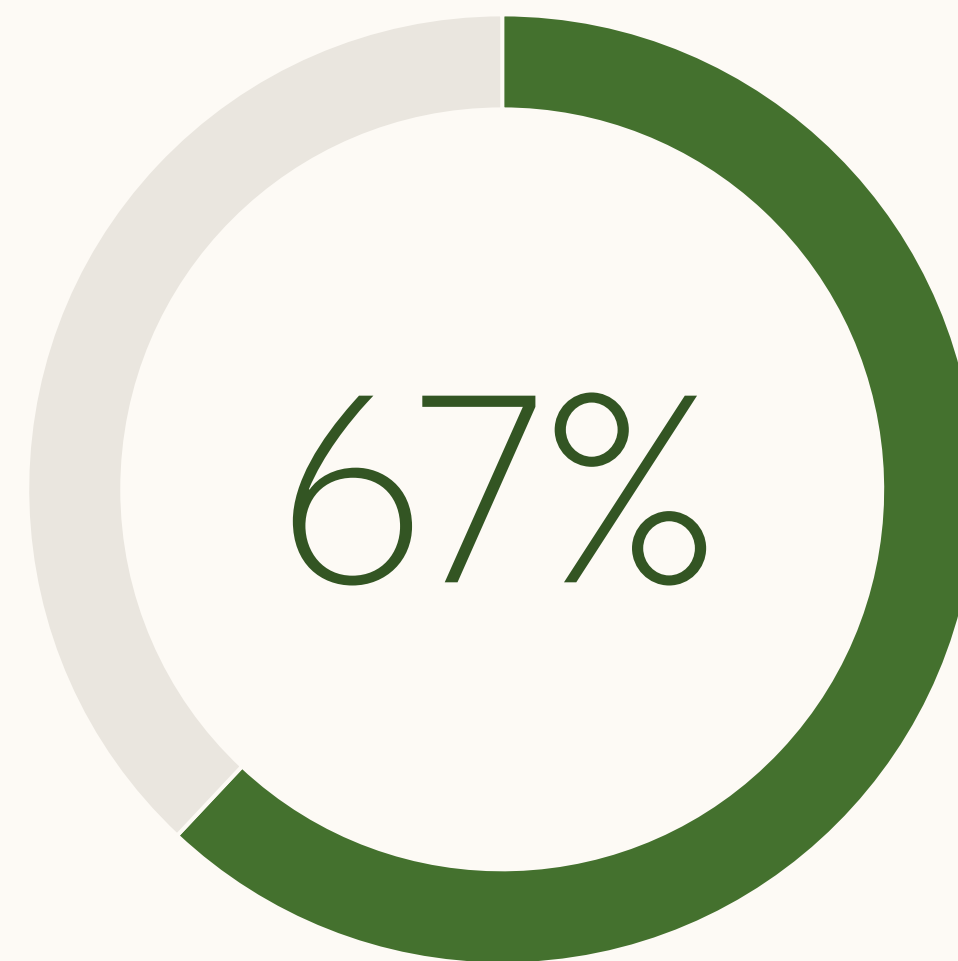
1 in 3 B2B marketing leaders in APAC are interested in integrating Generative AI into their marketing mix in the future.



There's excitement around and eagerness to embrace the technology in APAC.



Of B2B marketing leaders in APAC say they are likely to use or continue using generative AI to promote business when AI-driven advertising opportunities become available.¹



Of B2B marketing leaders in APAC claim they have a good understanding of how to promote business using generative AI in marketing campaigns.²

1. Base Size n=1577





AI CONSIDER: How likely are you to continue/consider using generative AI to promote your/ your top client's business when advertising opportunities become available that utilize the technology?

2. Base Size n=1577

AI UNDERSTAND: How would you describe your level of understanding of how to promote your/ your top client's business using generative AI in marketing campaigns?

In APAC, B2B organizations also consider employee advocacy and Share of Voice as important indicators of brand health.

- Employee advocacy is a significantly stronger measure of brand health in APAC than other regions (28%, vs 18% in NA, 21% in LATAM, and 16% in EMEA).
- Share of Voice is a significantly more important tool for brand measurement in APAC than other regions (45%, vs 27% in NA, 21% in LATAM, and 34% in EMEA).

Measures of Brand Health	 APAC	 EMEA	 LATAM	 NAMER	Global
Social listening	46%	33%	36%	38%	37%
Share of Voice	45%	34%	21%	27%	34%
Employee advocacy	28%	16%	21%	18%	20%

Base size: Total (n=1577); APAC (n=375); NA (n=300); LATAM (n=151); EMEA (n=751)
 BRANDMEASURE: How does your top client/do you measure brand health?

Research conducted by Ipsos, March 2023 to May 2023.

Europe, Middle East & Africa Spotlight

B2B marketing leaders in EMEA have an entrepreneurial mindset and are focused on upskilling. They are more inclined to consume thought leadership content and utilize professional networking platforms such as LinkedIn – significantly more than B2B leaders in other regions.



B2B Leaderboard Top Brands in Europe, Middle East & Africa

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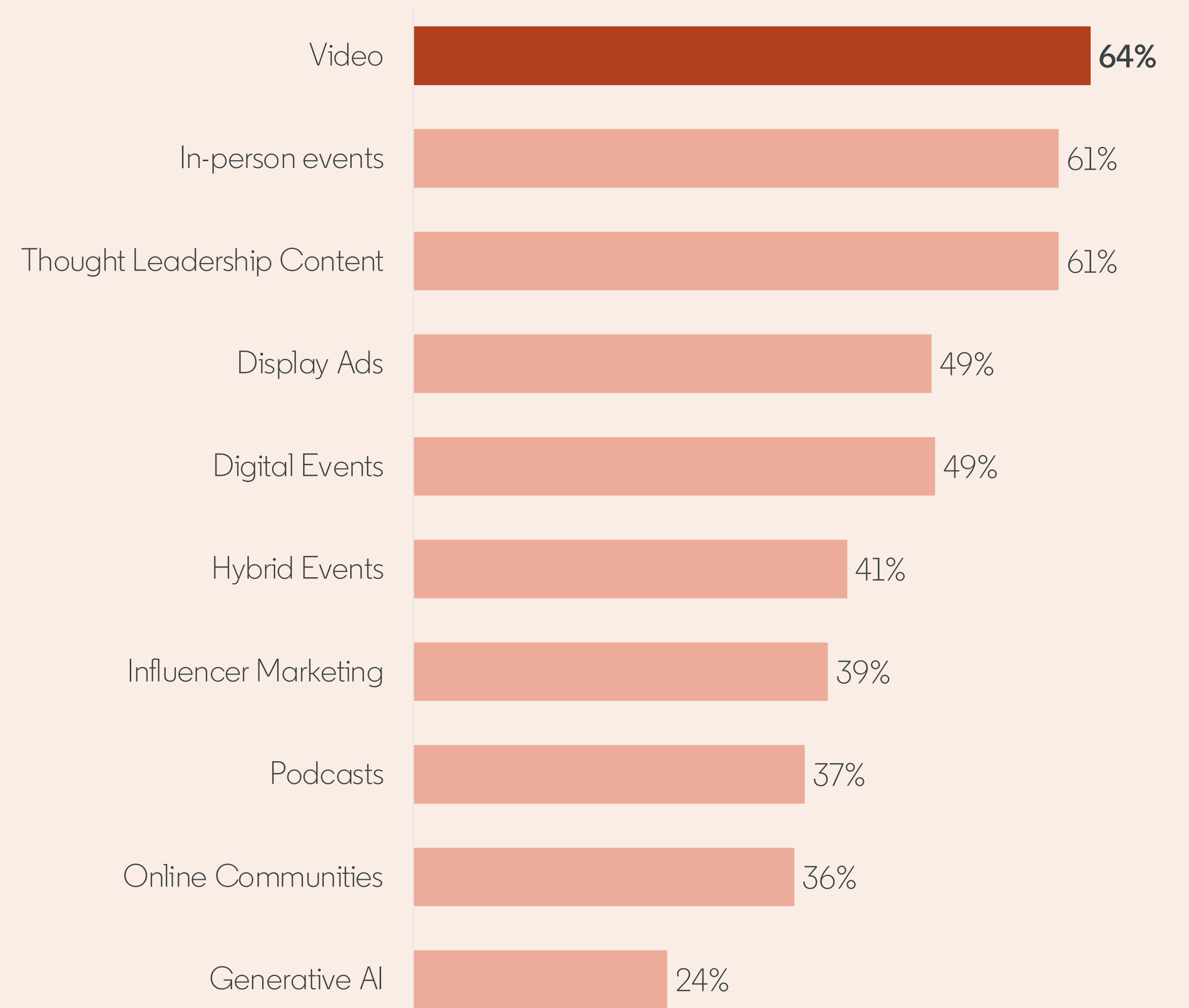
B2B marketers in EMEA use video to connect with audiences.

Video stands out as one of the highest intended usage channels according to almost 2 in 3 B2B Marketing Leaders, significantly more compared to other regions.

Base size: EMEA (n=751)
CHANNELS: What B2B marketing techniques (does your top client / do you) plan to use in the next year?





Research conducted by Ipsos, March 2023 to May 2023.

Marketing Techniques Planned to be Used in the Next Year



Thought leadership content is the top marketing tactic in EMEA in conjunction with high LinkedIn usage.





Around 1 in 4 B2B Marketing leaders in EMEA say thought leadership content is the Top Channel for meeting marketing needs, significantly more than any other region.

Top Channel for Meeting Marketing Needs	 EMEA	 APAC	 LATAM	 NAMER	Global
Thought Leadership Content	24%	19%	7%	16%	20%
In-person events	21%	21%	22%	22%	21%
Video	12%	9%	12%	10%	11%
Display Ads	10%	9%	11%	14%	11%
Influencer Marketing	8%	13%	22%	10%	11%
Hybrid Events	8%	9%	9%	5%	8%
Digital Events	7%	6%	3%	6%	6%
Online Communities	4%	5%	8%	5%	5%
Generative AI	3%	5%	4%	5%	4%
Podcasts	2%	3%	1%	5%	3%

Base size: Total (n=1575); APAC (n=375); NA (n=300); LATAM (n=151); EMEA (n=749)
 TOPCHANNEL: In your opinion, which channel is most effective at meeting your [top client's] marketing needs?

Research conducted by Ipsos, March 2023 to May 2023.

Professional networking platforms such as LinkedIn are used significantly more in EMEA, compared to other regions.

Top Channel for Meeting Marketing Needs	 EMEA	 APAC	 LATAM	 NAMER	Global
LinkedIn	84%	77%	78%	75%	80%
YouTube	61%	64%	70%	63%	63%
Facebook	51%	62%	62%	62%	57%
Instagram	49%	50%	82%	49%	52%
Twitter	35%	46%	25%	48%	39%
TikTok	15%	15%	23%	16%	16%
Spark/Amazon	8%	10%	10%	11%	9%
Snapchat	4%	5%	0%	8%	4%

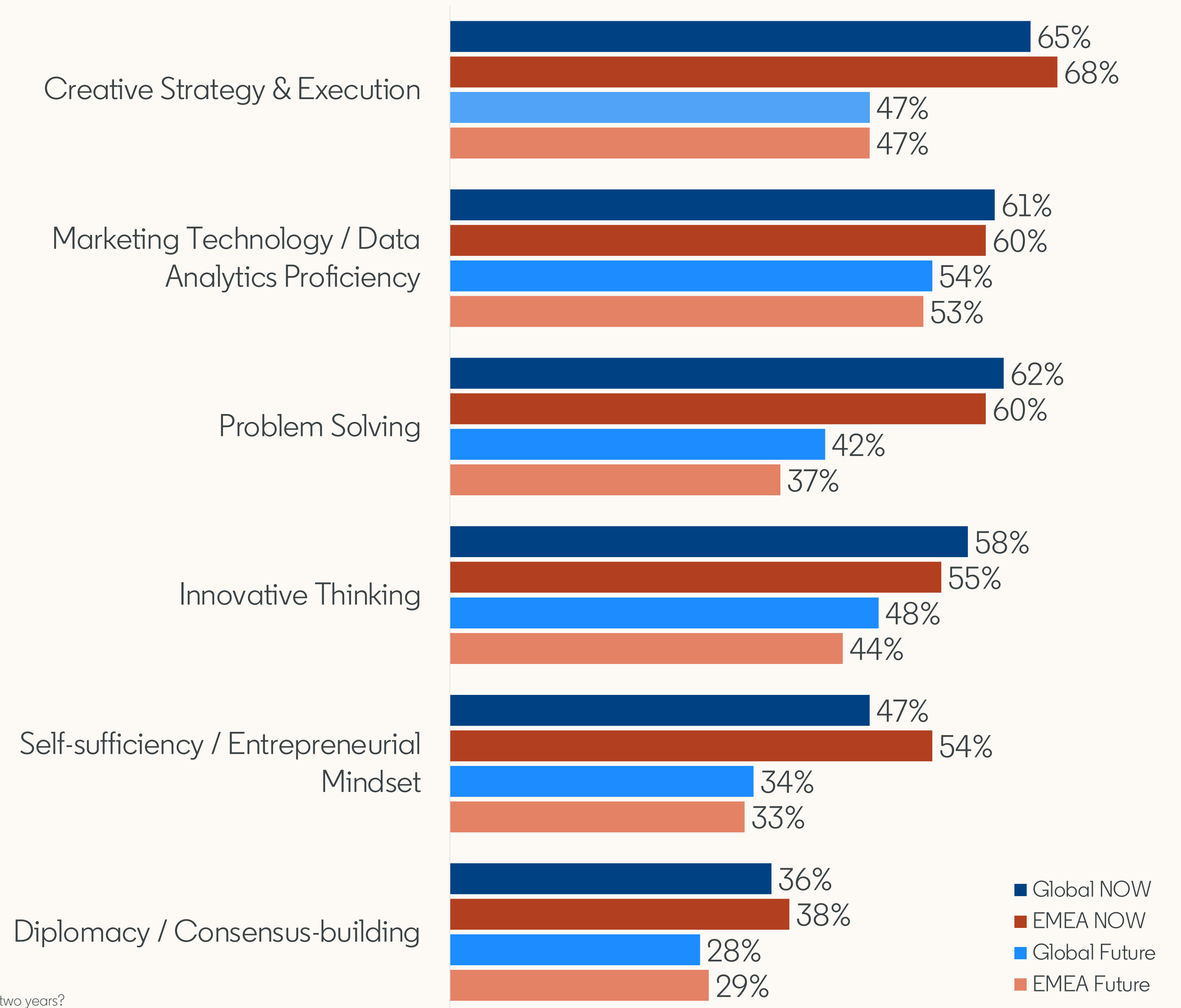
Base size: Total (n=1577); APAC (n=375); NA (n=300); LATAM (n=151); EMEA (n=751)
 SOCIALPLATFORM: Which of the following social media platforms have your top client/you used for B2B marketing in the past year?

Research conducted by Ipsos, March 2023 to May 2023.

Skills like innovative thinking and creative strategy are of great importance.

- Almost 7 in 10 B2B Marketers in EMEA say creative strategy & execution is the top skill required for their current role.
- More than 1 in 2 EMEA B2B Marketing Leaders say Self-sufficiency / Entrepreneurial mindset is a top skill required in their current role, significantly higher than other regions.

Most important Skills for Role (Now vs. Next 1-2 years)



Base size: Total (n=1577); EMEA (n=751)

1. SELFSKILLIMPORTFUTURE: In your opinion, which of the following skills will be most important for you in your role in the next one to two years?

2. SELFSKILLIMPORT: In your opinion, which of the following skills are most important for you in your current role?

Research conducted by Ipsos, March 2023 to May 2023.

Latin America - Brazil Spotlight

B2B CMOs in LATAM are setting themselves up for success - between the expanding role of CMOs in business intelligence decision-making, and the intentional skill building in order to demonstrate the impact of brand building, LATAM is poised to be at the forefront of technology adoption and preparedness for future challenges.



B2B Leaderboard Top Brands in Latin America - Brazil

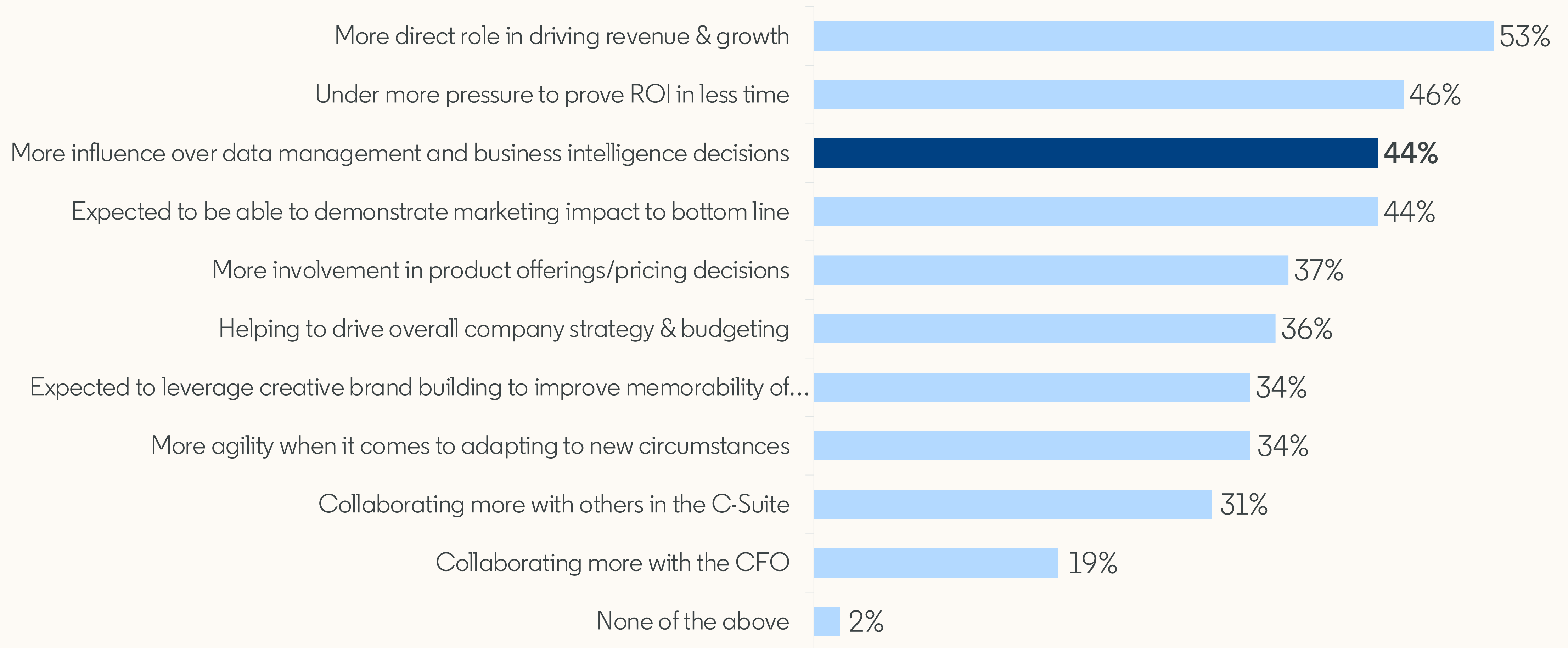
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A significantly higher percentage of LATAM B2B C-Suite believe the role of the CMO has evolved to have more influence over data management and business intelligence decisions, compared to other regions.

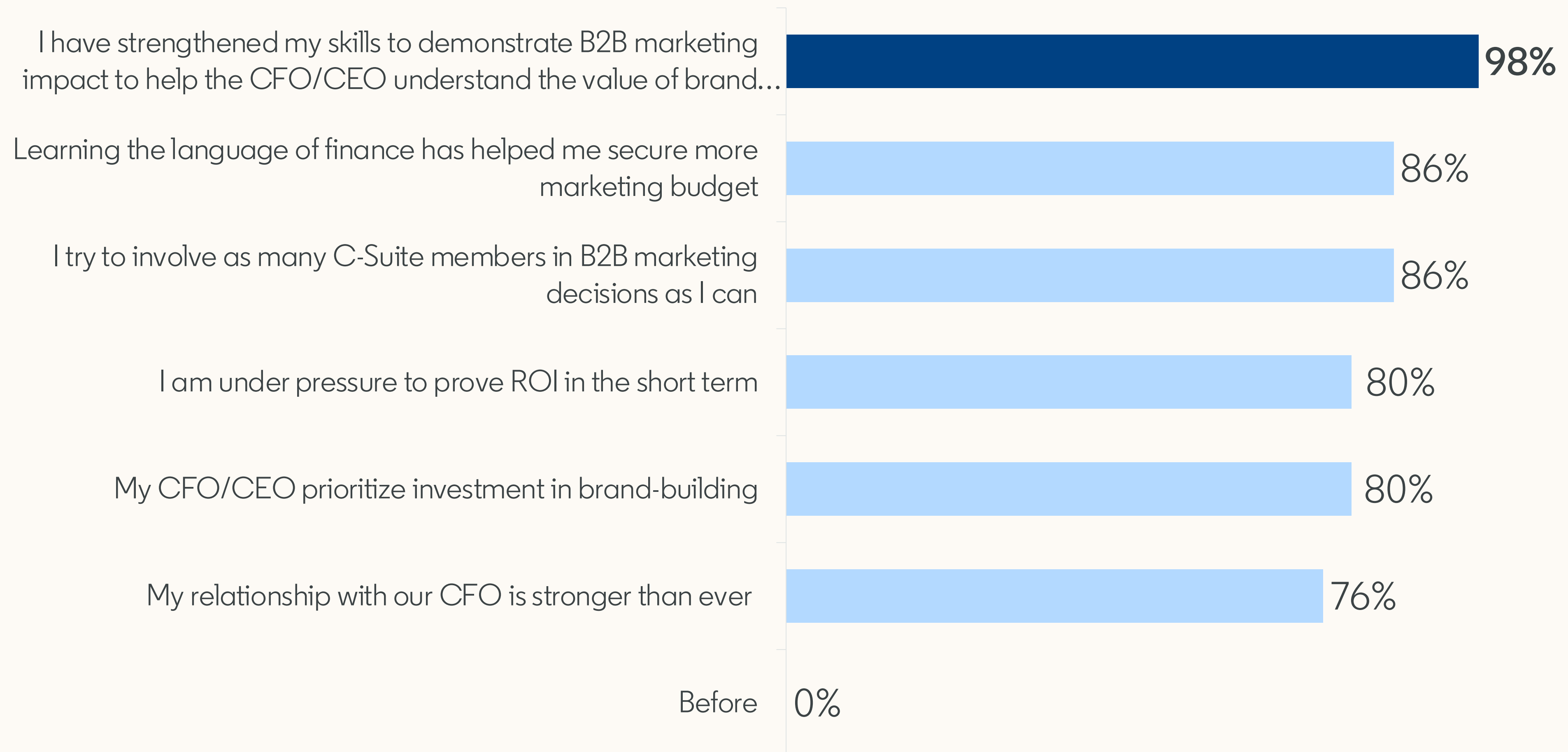


Base size: LATAM (n=99)

CMOROLECHANGE: In which of the following ways has your/the CMO's role changed in the last two years? If you were not in your current role two years ago, please provide your best estimate based on your knowledge of the company's history

Research conducted by Ipsos, March 2023 to May 2023.

Almost all B2B Marketing CMOs in LATAM say they have strengthened their skills to demonstrate B2B marketing impact to help the CFO & CEO understand the value of brand marketing, significantly more than in other regions.

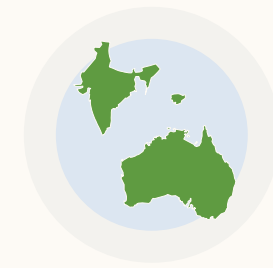


Base size: LATAM (n=50)
CMOATTITUDES: Please indicate how much you agree or disagree with each of the following statements about your role.

Research conducted by Ipsos, March 2023 to May 2023.

B2B marketing leaders in LATAM say problem solving and MarTech/data analytics proficiency are significantly more important current skills in their role compared to other regions; And 2 in 3 state MarTech/ data analysis mastery will be the top skill for their role in the next 1-2 years, significantly more than other regions.

Most Important Skills For B2B Marketers In Current Role



APAC



NAMER



EMEA



LATAM

Global

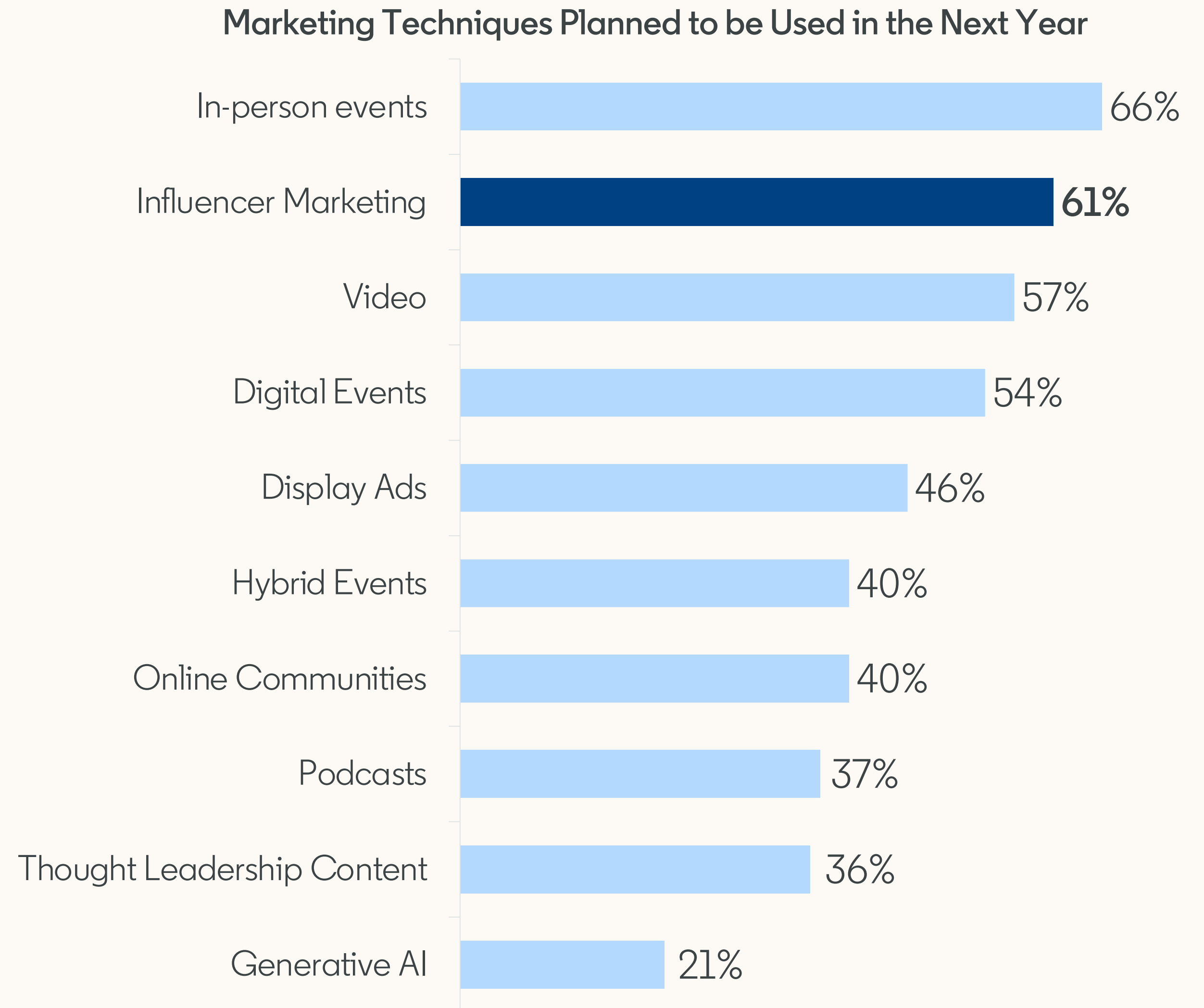
	APAC	NAMER	EMEA	LATAM	Global
Creative Strategy and Execution	60%	66%	68%	62%	65%
Problem Solving	62%	59%	60%	74%	62%
Marketing Technology / Data Analytics Mastery	61%	56%	60%	78%	61%
Innovative Thinking	61%	61%	55%	58%	58%

Base size: Global (n=1577); APAC (n=375); NA (n=300); EMEA (n=751); LATAM (n=151)
 SELFSKILLIMPORT: In your opinion, which of the following skills are most important for you in your current role?

Research conducted by Ipsos, March 2023 to May 2023.

Influencer Marketing & Social Media are Popular in LATAM.

LATAM (61%) stands out compared to other regions regarding use of influencer marketing, with projected use expected to grow (79%) according to B2B Marketing Leaders.



Base size: LATAM (base size floating)
CHANNELFUTURE: Thinking about the next year, how, if at all, do you think your [top client's] usage of each of the following channels will change?

Research conducted by Ipsos, March 2023 to May 2023.

North America Spotlight

B2B Marketers in the NAMER region are prudent about the upcoming disruptions in the market. More than half of B2B Leaders say their biggest business priority for the next year is balancing brand and demand marketing initiatives in an uncertain environment.

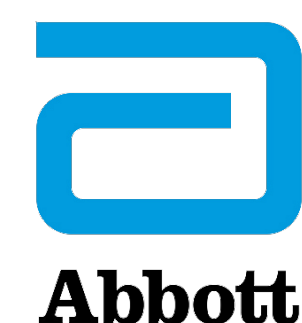


B2B Leaderboard Top Brands in North America

Leveraging [LinkedIn's B2B Index](#), The B2B Leaderboard identifies a distinct cohort of B2B companies worldwide that excel at brand building.

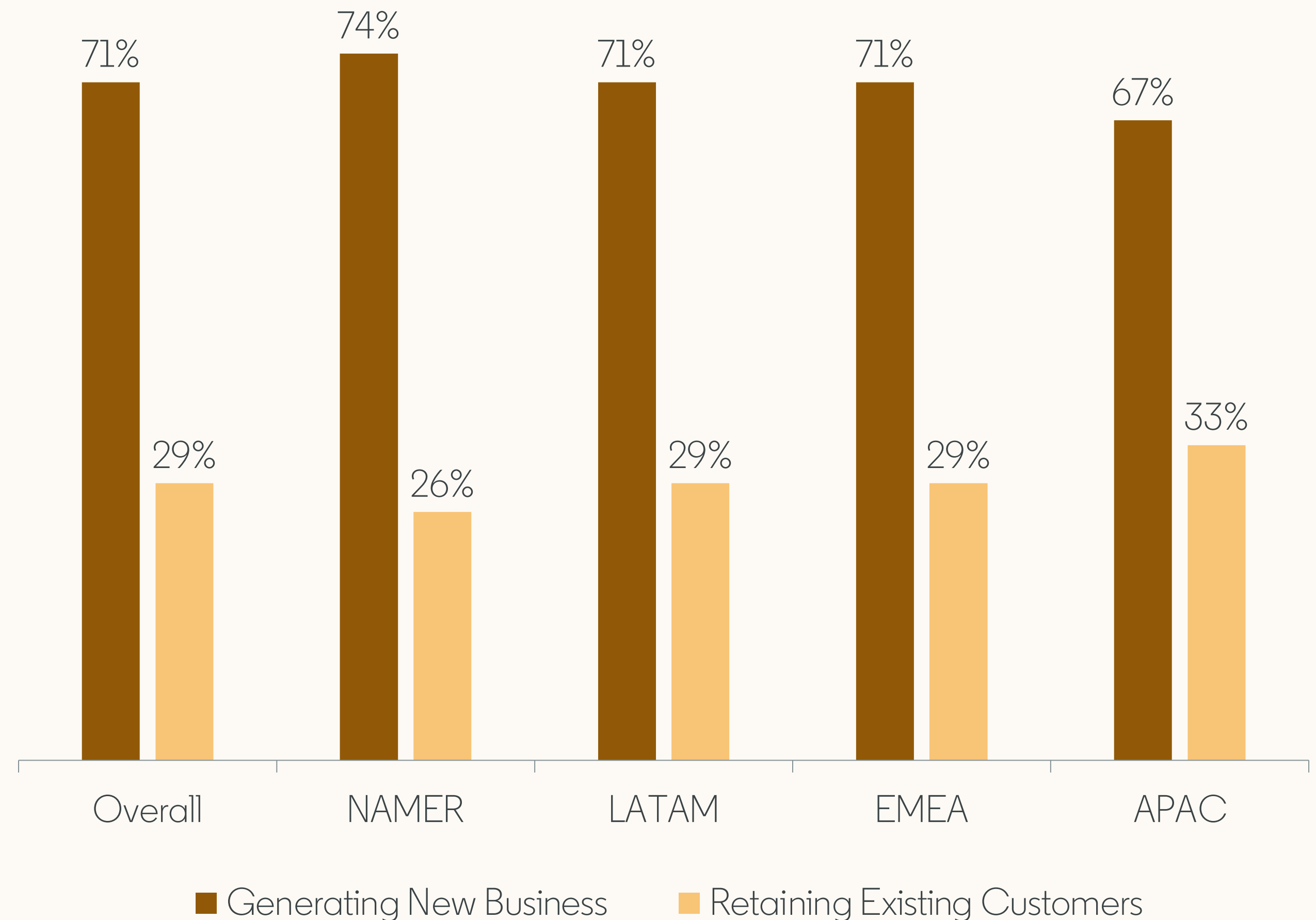
By examining factors such as creativity, distribution and investment, we generate a composite score for every organization in the B2B Index. This allows us to build a comprehensive and comparable assessment of effective B2B brand building for companies within the same industry.

Not just one, but four regional lists (APAC, EMEA, LATAM-Brazil, NAMER) complement a singular global index, underscoring these brands' diverse and widespread influence.



Focus on generating new business is higher than retaining existing customers in North America, compared to other regions.

% of B2B Marketing Budget Allocated by Region




Base size: Total (n=1954); NAMER (n=350); LATAM (n=200); EMEA (n=904); APAC (n=500)

BUDGETALLOCATIONCUSTOMER: Now, please rank the following types of business in order of how much of your [top client's] B2B marketing budget is allocated to each, with 1 being the largest portion of the budget and 2 being the smallest.

Research conducted by Ipsos, March 2023 to May 2023.





Balancing brand and demand marketing initiatives in an uncertain environment stands out as one of the biggest business priorities for the next year in North America, compared to other regions.

Biggest business priorities for the next year					
	Global	NAMER	LATAM	EMEA	APAC
Improving B2B measurement tools and relying on data and insights to demonstrate effectiveness	60%	60%	57%	59%	62%
Creating relevant and useful thought leadership and content for customers	51%	52%	51%	52%	49%
Championing bolder, more creative tactics in B2B brand campaigns to win share	51%	49%	52%	54%	48%
Balancing brand and demand marketing initiatives in an uncertain environment	49%	54%	49%	44%	54%
Optimizing marketing goals by building a strong martech stack	41%	41%	47%	37%	44%
Supporting my (top client's) company's digital transformation goals	40%	42%	43%	37%	44%
Building a strong relationship with the CFO and mastering the language of finance	4%	3%	6%	3%	5%

Base size: Total (n=1954); NAMER (n=350); LATAM (n=200); EMEA (n=904); APAC (n=500)
 PRIORITIES: Which of the following are your [top client's] biggest business priorities over the next year?

Research conducted by Ipsos, March 2023 to May 2023.

B2B leaders in North America say, that CMOs are expected to leverage creative brand building to improve memorability of products & services at a higher rate than in other regions.

Change in the CMO role in the last two years	   				
	Global	NAMER	LATAM	EMEA	APAC
Expected to be able to demonstrate marketing impact to bottom line	47%	44%	44%	45%	52%
More direct role in driving revenue & growth	47%	52%	53%	40%	50%
Under more pressure to prove ROI in less time	40%	45%	46%	39%	36%
Helping to drive overall company strategy & budgeting	39%	42%	36%	34%	45%
Collaborating more with others in the C Suite	39%	43%	31%	37%	42%
Expected to leverage creative brand building to improve memorability of products/services	37%	46%	34%	33%	38%
More agility when it comes to adapting to new circumstances	37%	39%	34%	36%	38%
More influence over data management and business intelligence decisions	35%	33%	44%	33%	35%
More involvement in product offerings/pricing decisions	34%	31%	37%	31%	37%
Collaborating more with the CFO	25%	31%	19%	23%	27%
None of the above	1%	1%	2%	2%	1%

Base size: Total (n=751); NAMER (n=100); LATAM (n=99); EMEA (n=302); APAC (n=250)

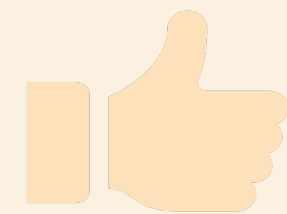
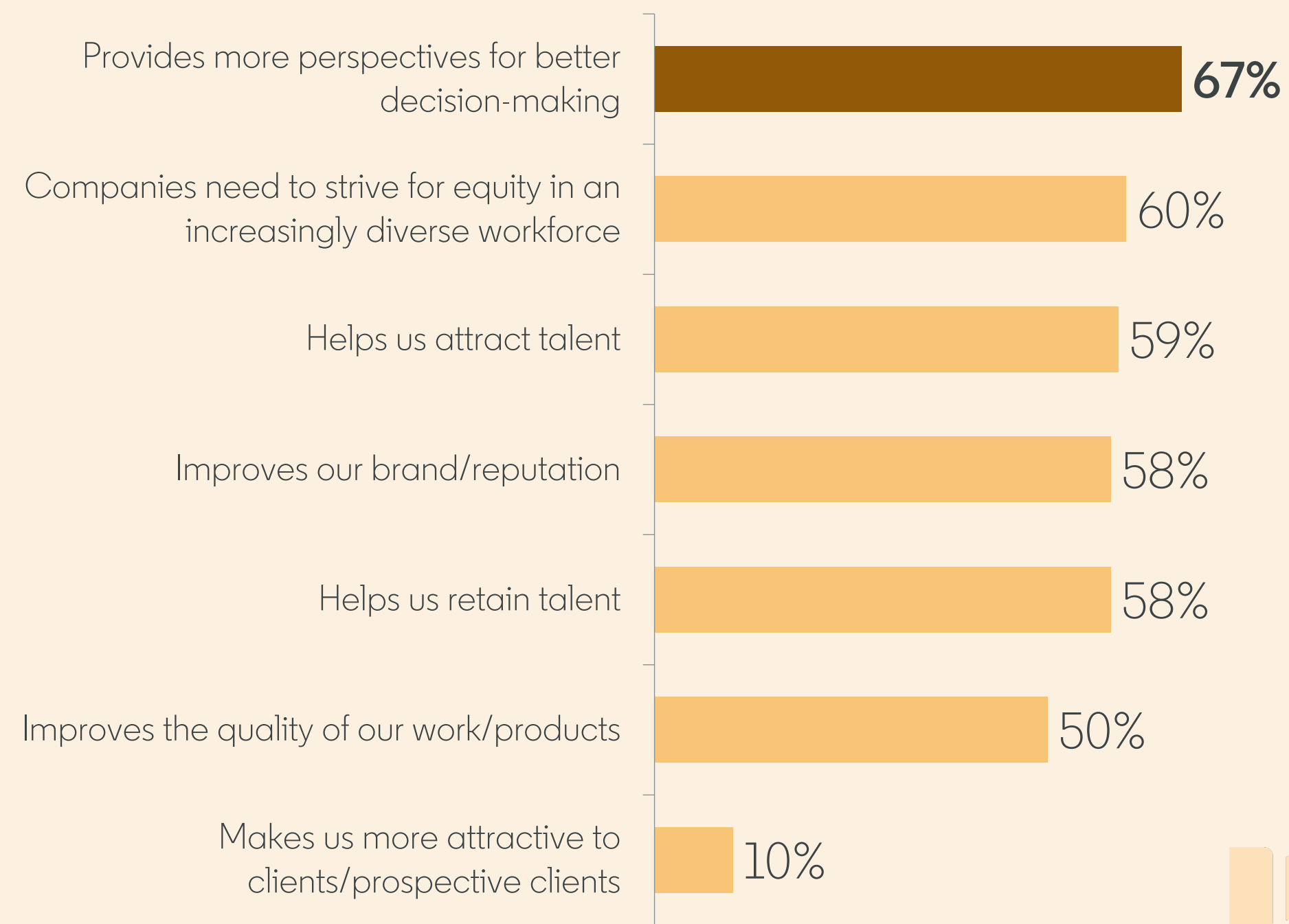
CMOROLECHANGE: In which of the following ways has your/the CMO's role changed in the last two years? If you were not in your current role two years ago, please provide your best estimate based on your knowledge of the company's history.

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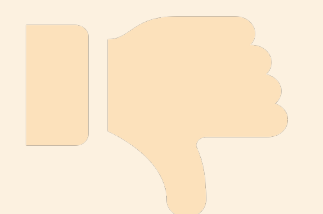
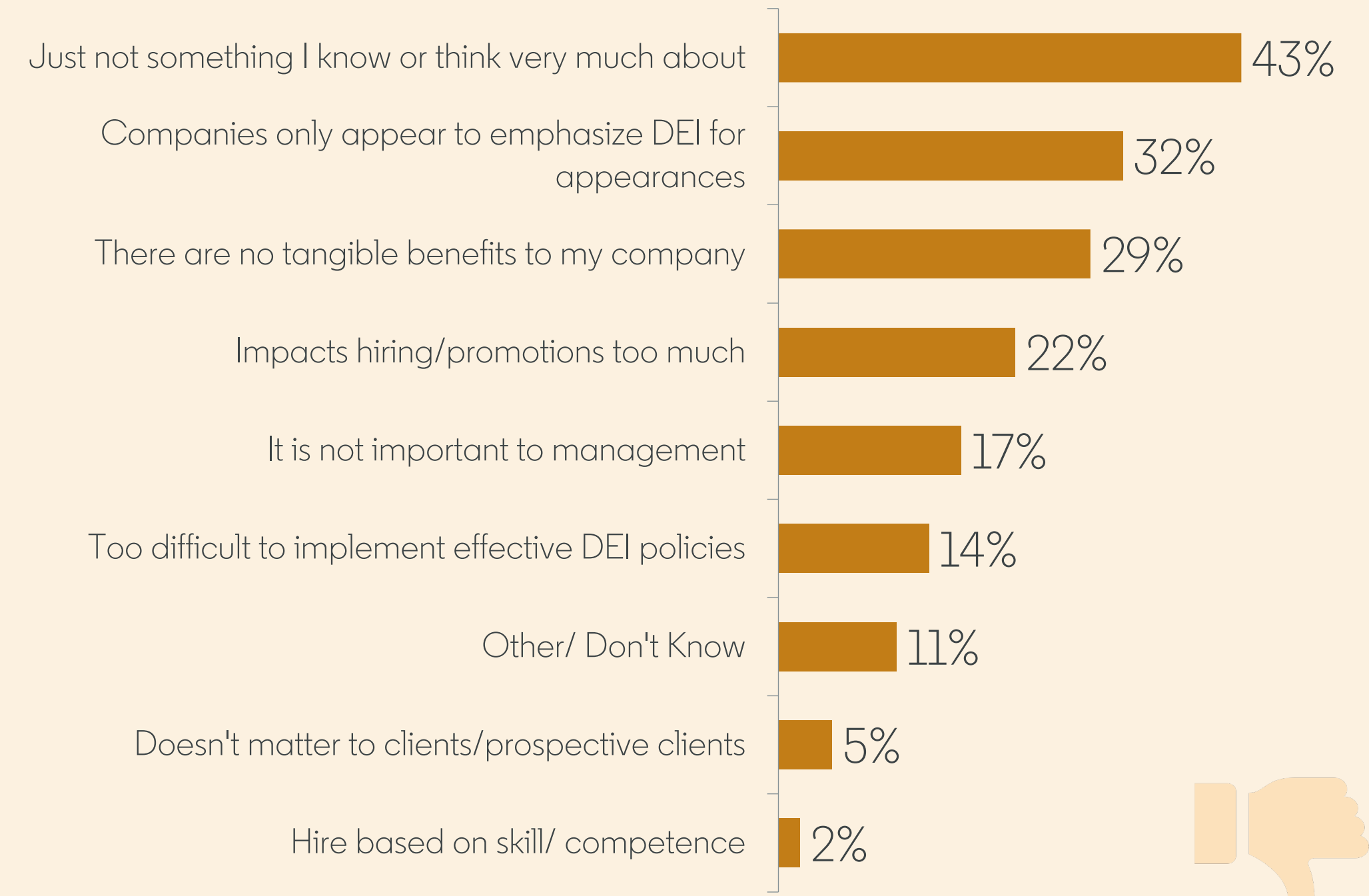
DEI and Accessibility are top of mind for B2B Leaders in NAMER.

Just under 7 in 10 senior leaders in North America say that DEI provides greater perspective for better decision-making, significantly more than any other region. Website compatibility with screen readers, mobile devices, and keyboard navigation (52%) is highest in NA amongst regions.

Why is DEI important to you



Why is DEI NOT important



NA leads in tracking turnover rate of diverse employees (43%), which is significantly higher than all other regions.

Base size: NA (n=285)

DEIIMPORTWHY: Please select any of the following reasons why DEI is very/somewhat important to you.

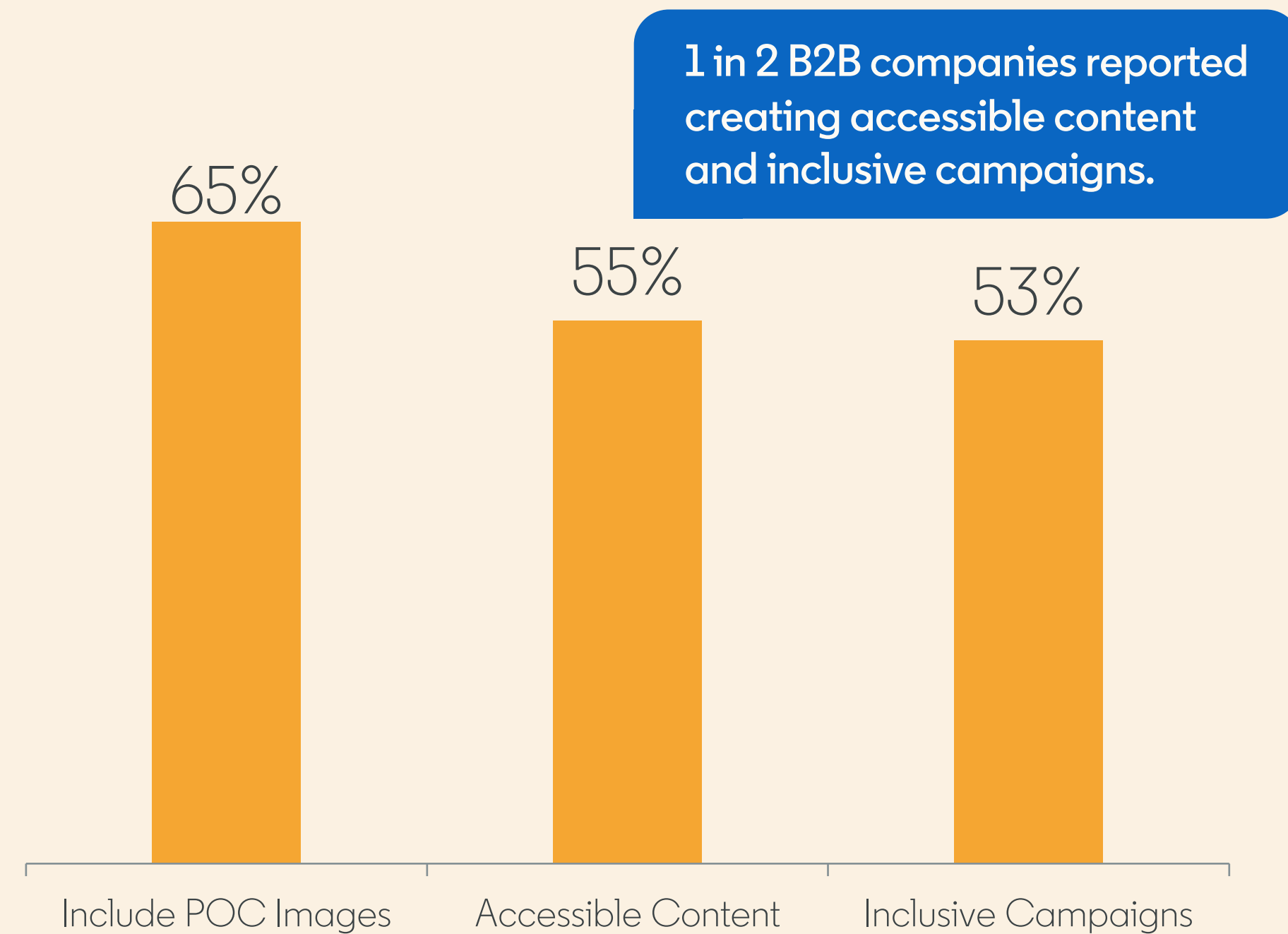
Base size: NA (n=65)

DEIIMPORTWHY_1: Please select any of the following reasons why DEI is neither important nor unimportant/not very important/not at all important to you.

Research conducted by Ipsos, March 2023 to May 2023.

B2B marketers in NAMER are focused on being inclusive and accessible in their marketing content and advertising campaigns.

DEI efforts in marketing content and campaigns¹



How does the marketing organization measure the impact of DEI efforts?²

- Track number of diverse employees across organization (54%)
- Track number of diverse leaders across organization (51%)
- Track participation in DEI training sessions/programs (46%)

1. Base size: NA (n=230)
DEIINVOLVE: What kinds of DEI initiatives does your marketing organization participate in?

2. Base size: NA (n=230)
DEIMETRICS: How does your marketing organization measure the impact of its DEI efforts?



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