

JUNE 2023

OUTLOOK FOR B2B MARKETING

wg Winterberry
Group

A MARKET IN TRANSFORMATION



This whitepaper's purpose is to better define the transformation that has undergone the B2B marketing landscape. In the process of developing this paper, Winterberry Group surveyed more than 200 marketers across both the US and Europe and conducted in-depth interviews with over two dozen brand, agency and vendor executives.

The result is an evidence-based examination of current and emerging B2B industry trends, challenges and future factors for success.

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EXECUTIVE SUMMARY

It is becoming increasingly clear that over the next several years, B2B's accelerated transformation during and post-COVID will continue and is likely to hasten even further. The adoption of artificial intelligence driven strategies and tactics – whether leveraging machine learning or conversational AI, are not the primary catalysts. The changes in buyer behavior- how products are discovered, where we research and fulfil our buying journeys were going to change in any event and lead to the accelerated consumerization of B2B.

Among the key drivers of transformation, we see nine key trends having the greatest impact.

The elevation of digital natives into decision making roles is leading to a systemic change in buying behavior.

Generational change, particularly millennial ascendancy, will be one of the primary drivers of the next stage of B2B marketing. B2B buying will continue to be impacted by the consumer journey that buyers experience in their non-business lives.

The buying journey will start and more often end online, though the path is not linear as engagement moves more seamlessly between online and offline interactions.

Engagement may begin online, but then move through in-person experiences that are amplified digitally and integrated across physical and digital touchpoints.

B2B Commerce will see significant continued expansion.

The purchasing process, whether through individuals, steering committees or procurement will move online. The outlook for

B2B Commerce growth is currently expected to move from \$1.7 trillion in the US to \$2.5 trillion by 2026. In-line growth is expected in Europe, though we do not expect the percentage of buying online to equal that of consumer commerce in either place.

Thought Leadership in combination with creative will drive brand trust in a crowded media and information market. Volume and scale do not enable thought leadership, the right content, with transparency, that provides perspective and information will be used to drive trust – which will enhance buyer perception of the brand – and its products.

The execution of content and creative will be transformed by AI. How content is planned, created, briefed and executed will be where investments in conversational AI are going to enable cost effective “content at scale and speed”. Creative, however, is more likely to be impacted by machine learning, with the ability to provide creative intelligence, versioning, and optimization- though not the “creative idea”.



The variety of data and metadata will increase even if identifiers are lost, enabling improved decisioning and orchestration of B2B experiences. Data and privacy will be inextricably linked as a driver and enabler of trust and transparency with improved performance. Data infrastructure investments will provide a better organized, more secure, and scalable environment connected to automated, analytically driven decisioning and orchestration platforms. The linkage of the data and the technology is still early in maturity, with process gaps—more than technology gaps—as a core problem to be overcome.

The tech stack will see improved utilization across marketing and sales, with adoption driven by what should be done vs what can be done. It is not going to be about “more” but about “how to get the most out of” to justify martech, sales enablement and adtech investments. Expect fewer activation solutions, but ones that are better integrated. Investments in data infrastructure including CDPs, data clean rooms, cloud based analytic environments, and AI enabled toolsets will see an increase, positively impacting the ability to target more precisely, accurately measure and equally important, deliver customer insight to inform creative.

The organizational transformation for B2B marketers is going to be continuous. Organizations will become more strategic, and roles more fluid as tactical execution becomes more automated. Career growth will require greater cross functional training with a more rotational experience model. Expect that

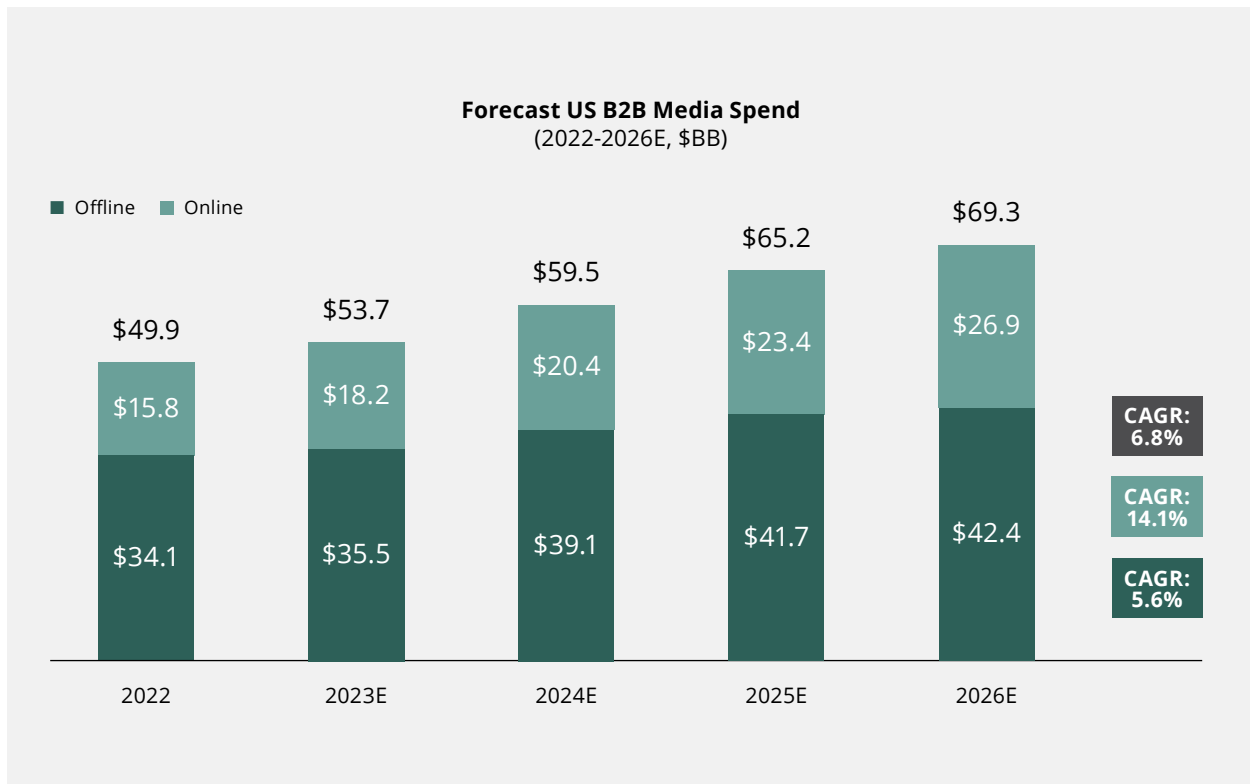
until such time as B2B has caught up in digital experience, hiring will “borrow” from B2C brands or the B2C part of the organization, bringing more best practices and a “consumer engagement” mindset to B2B.

The downstream impact will be a marketing staff re-allocation, potentially re-balancing the relationship between marketers and the marketing supply chain. The ability to automate marketing will reduce the need for scaled staffing models while at the same time increasing the need for higher value strategic support for planning, creating, buying, and measuring.

Budgets will continue to shift to digital, but not reach parity or dominance as it has with consumer marketing spend. With discovery and purchase moving through a more digital process, the use of digital media channels, primarily search and paid social will grow above market, helping to fill the top of the funnel and not just the mid and lower funnel tactics of performance marketing. B2B marketers should be looking at the balance between brand and performance spend, with creative, especially the use of video, adjusted to optimize filling the funnel and then nurturing through performance.

The outlook for B2B is that of transformative growth in a hybrid world, with bumps along the way as people and processes change to match the availability of information and meet the ‘new buyer’. Winterberry Group’s current forecasts through 2026 indicate increases in budgets, yet it is as much about the shift within the budgets as growth overall.

GRAPH 1 – US B2B ADVERTISING AND MARKETING SPEND FORECAST



Winterberry Group (2023)

INTRODUCTION

THE EVOLUTION OF B2B MARKETING

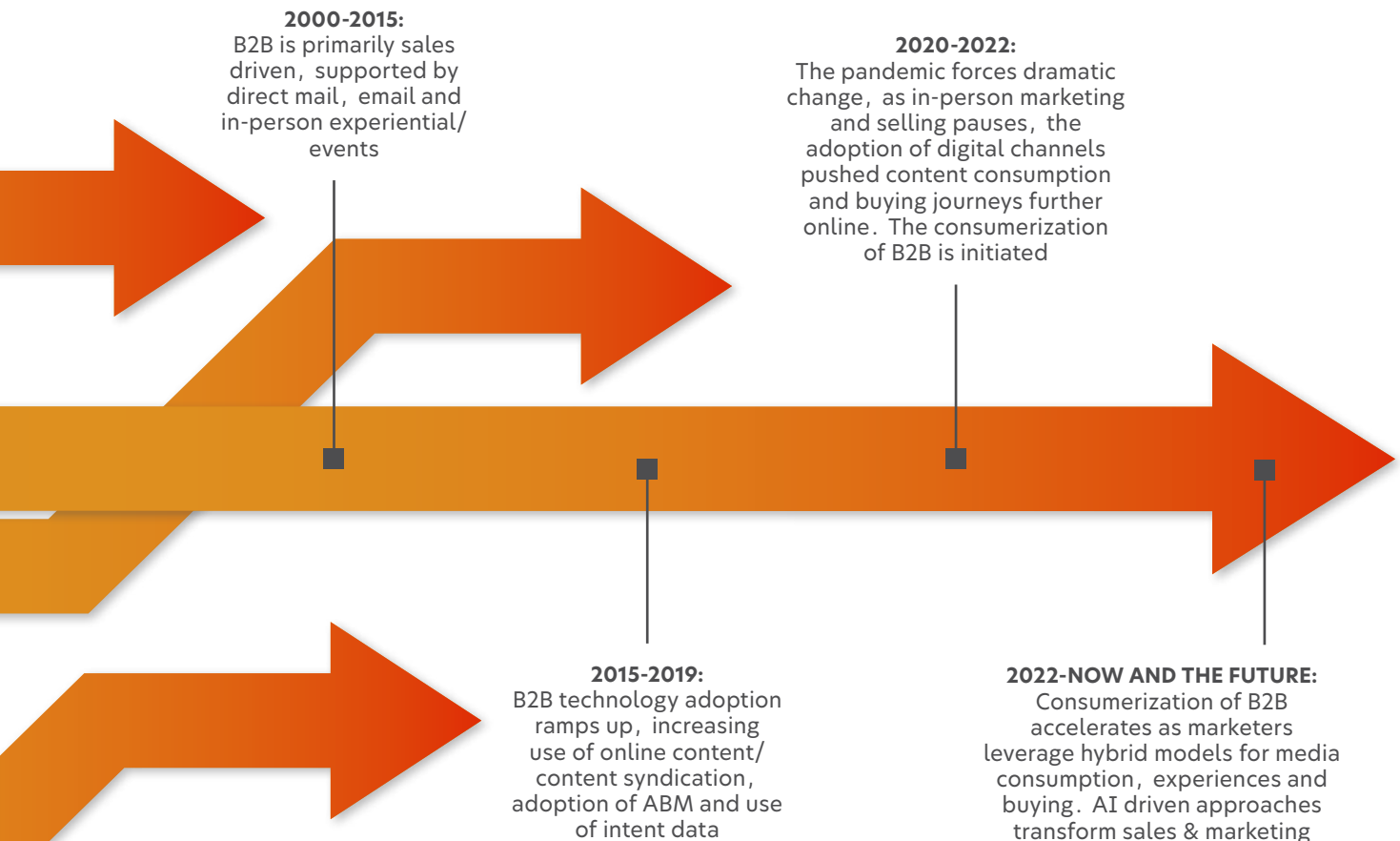
Historically, B2B marketing was anchored in below-the-line strategies, with a significant proportion of the marketing and advertising budget earmarked for direct marketing, direct mail, and experiential marketing, which typically included in-person events and sponsorships. However, as the digital media age dawned and gained momentum - fueled by increased digital media consumption, the ascent of social media, and the proliferation of mobile devices - the B2B marketing industry found itself on the precipice of a radical transformation.

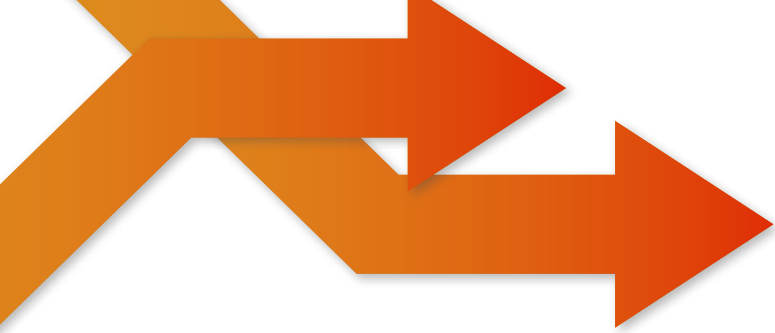
This transformation ran parallel to a significant shift in the utilization of marketing technology. New-generation B2B CRM platforms, like Salesforce and HubSpot, were initially designed to buttress sales efforts but later expanded to include marketing and automated nurturing through marketing automation platforms. As the market landscape continued to evolve, the use of marketing automation broadened to encompass more sophisticated account-based marketing (ABM) solutions,

highlighting the growing partnership between marketing and sales-oriented organizations.

Even though B2B marketing lagged in terms of more modern adoption, it remained focused on funneling more leads into the sales pipeline and gradually expanded its reach in paid digital media. This expansion was evidenced by an uptick in spending on additional channels such as display and video.

GRAPH 2 – TIMELINE OF SIGNIFICANT DEVELOPMENTS IN THE EVOLUTION OF B2B MARKETING



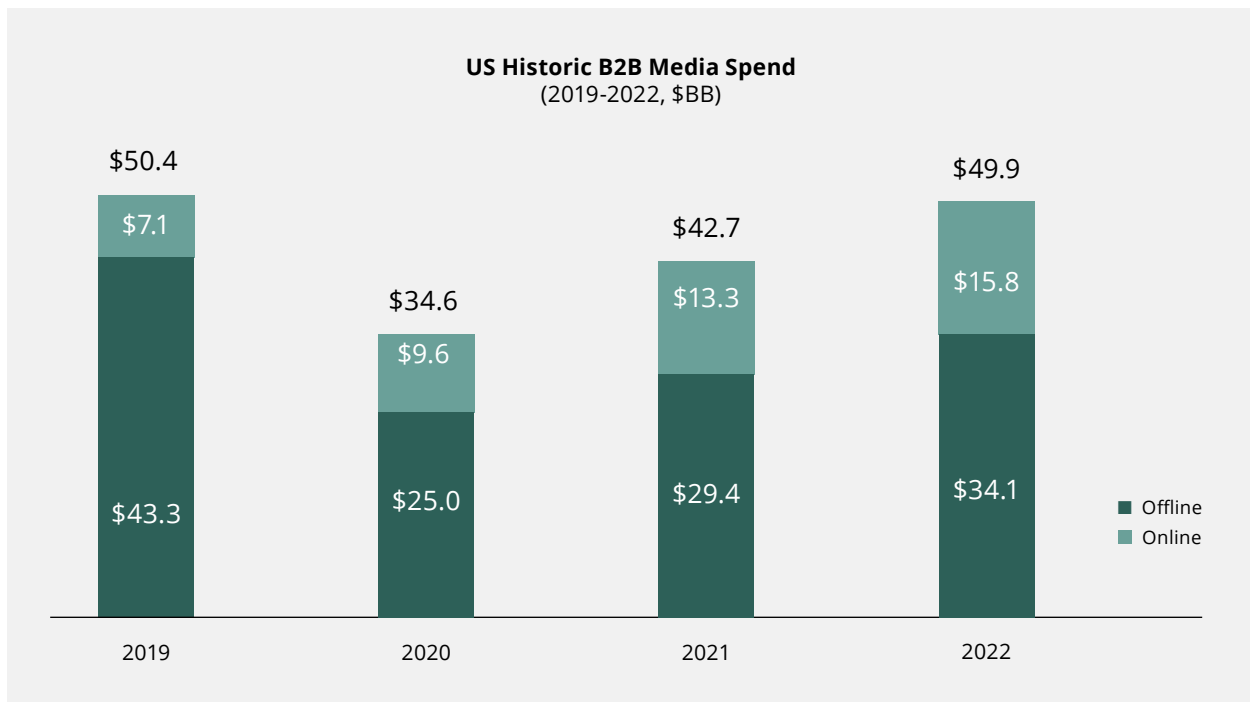


However, these transformative changes did not substantially impact budgets until B2B marketing encountered its most significant disruptor – the onset of COVID-19. The pandemic’s restrictions on direct, in-person interaction with B2B buyers led to a fundamental shift in the approach to both sales and marketing. Marketing, which had traditionally been considered a subordinate partner to sales in areas beyond branding, events, and public relations, found its role elevated. B2B marketers became more akin to true partners, tasked with a brief that spanned both brand and performance.

The influence of COVID-19 extended beyond merely curtailing in-person interactions. It precipitated a mass exodus of buyers from their offices and spurred a significant rise in the adoption of e-commerce as a pivotal stage in the sales process. The shifts in buyer access and availability, combined with a more hybrid approach to purchasing and the emergence of the digital-centric consumer, dramatically reshaped the customer journey. Amid an accelerated B2B transformation, B2B influencers and buyers face a marketplace shaped by their changing needs and expectations. This convergence propels B2B marketing into uncharted territories, setting the stage for even more profound changes on the horizon.



GRAPH 3 – COVID FORCED A PERMANENT CHANGE TO B2B BUDGETS



Winterberry Group (2023)

TRENDS IMPACTING MARKETING

As we delve into the realm of modern B2B marketing strategies, three significant themes have come to prominence: personalized and targeted marketing, advanced marketing automation, and the rise of content marketing.

The increased emphasis on delivering personalized experiences necessitates marketers gain deeper access to customer data, which is essential to understand potential customers' needs, preferences, and behaviors. Accordingly, marketers are tailoring their messages and content to meet these specific requirements. This approach has culminated in techniques like account-based marketing (ABM), which targets high-value accounts with customized messaging and content. Over the last decade, ABM has gained considerable traction and has emerged as a key marketing strategy for many businesses.

Additionally, the world of marketing automation has seen notable advancements, enabling marketers to optimize their campaigns in new and innovative ways. Modern automation tools empower B2B marketers with advanced capabilities such as personalized email content, website behavior tracking, automated responses based on a prospect's actions enabling more efficient and effective campaigns, personalized experiences, and the generation of more qualified leads, significantly enhancing overall marketing strategy.

In parallel, content marketing has gained increasing popularity to engage potential customers and cultivate relationships over time. Recognizing the value of creating educational and informative content, marketers are leveraging formats, particularly video, to establish their brands as thought leaders in their respective industries and to set themselves apart from competitors. The role of content has also evolved from not only attracting and nurturing leads, to also fostering brand awareness. The strategic use of content in marketing helps businesses to not only reach their audience but also resonate with them on a deeper level, thereby fostering stronger and longer-lasting relationships.

Thus, the face of B2B marketing is being reshaped by these emerging trends, transforming the ways businesses engage with potential customers and reinforcing the significance of a personalized, data-driven approach to marketing.



THE POST COVID IMPACT ON THE B2B BUYER JOURNEY

THE B2B CUSTOMER IS ALSO A B2C CONSUMER

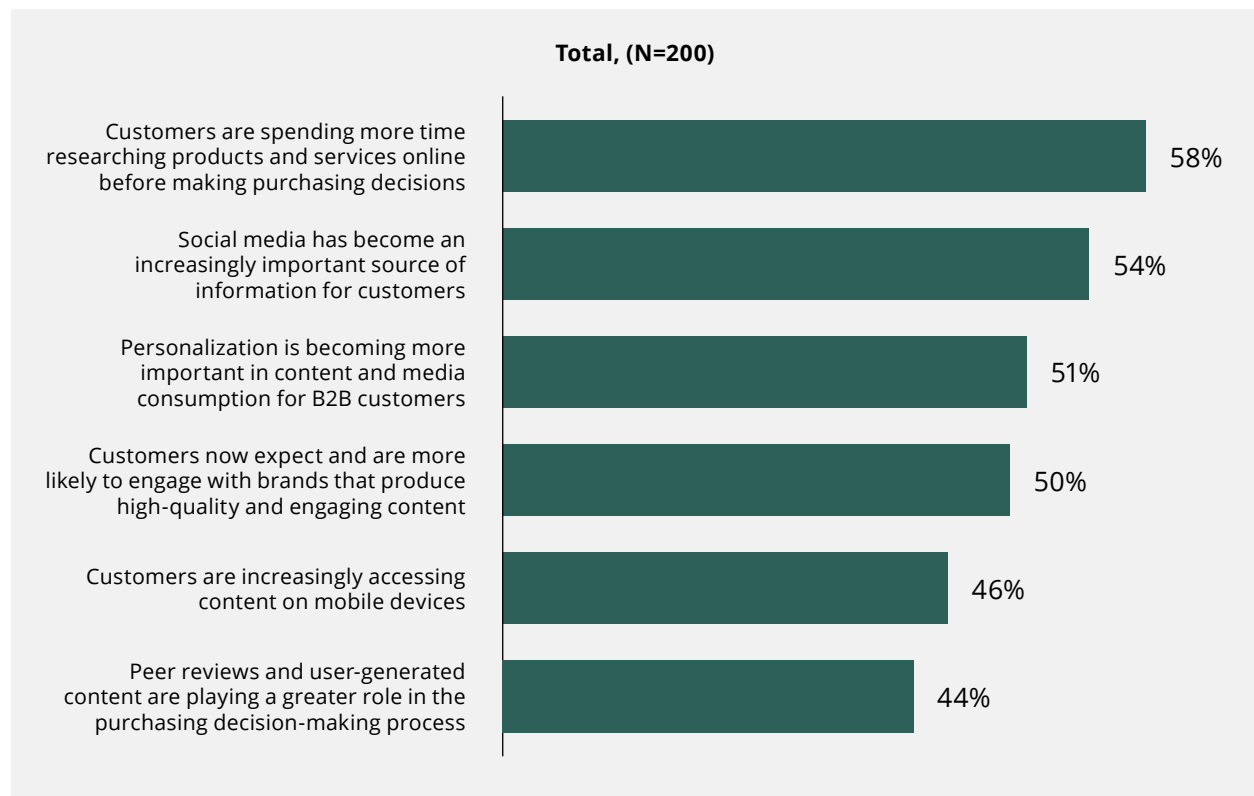
As the millennial generation increasingly moves into decision-making roles, we're witnessing the B2B buyer evolve, with more collaborative decisioning marked not only by the peer collaboration of the past, but a collaboration across social media for insight and opinion.

B2B customers, informed and influenced by their interactions as consumers, are now seeking personalized, convenient, and engaging experiences within their professional domain. A major trend gaining momentum in this regard is the creation of seamless and connected customer experiences. Today's B2B buyers are accustomed to the intuitive experiences they enjoy as consumers and expect similar ease and convenience from B2B interactions. Consequently, we're seeing a pronounced emphasis on customer UX design, 24/7 customer care, and an omnichannel brand presence that meets customers wherever they are.

Furthermore, the gap in research and purchasing decisions between B2B and B2C is also shrinking. Increasingly, B2B buyers are using consumer-style search and review platforms to research products and services, seeking the same kind of social proof and peer validation they would as consumers.

This shift, however, is not uniform globally. There are striking regional differences, particularly between the US and Europe. In the US, social channels play a key role in providing information to B2B audiences. On the other hand, European customers continue

FIGURE 1 - B2B BUYERS ARE INCREASINGLY RELYING ON ONLINE RESEARCH AND SOCIAL MEDIA TO INFORM THEIR PURCHASING DECISIONS



Winterberry Group Survey (2023)

“

I don't think the separation of professional and personal will remain. You buy as an individual, as a consumer. There is a crossover if it is a small business audience.

”

- Chief Executive Officer,
UK B2B Marketing Agency

to rely heavily on online research and branded content for purchasing decisions. Interestingly, peer reviews, although the least used source in the US, remain a vital information source in Europe.

As these trends continue to reshape the landscape, B2B marketers need to be proactive. They must engage on appropriate channels, deliver high-quality content, and interact with potential customers in ways that reflect their evolving preferences and behaviors. The new digital-native B2B buyer demands nothing less.

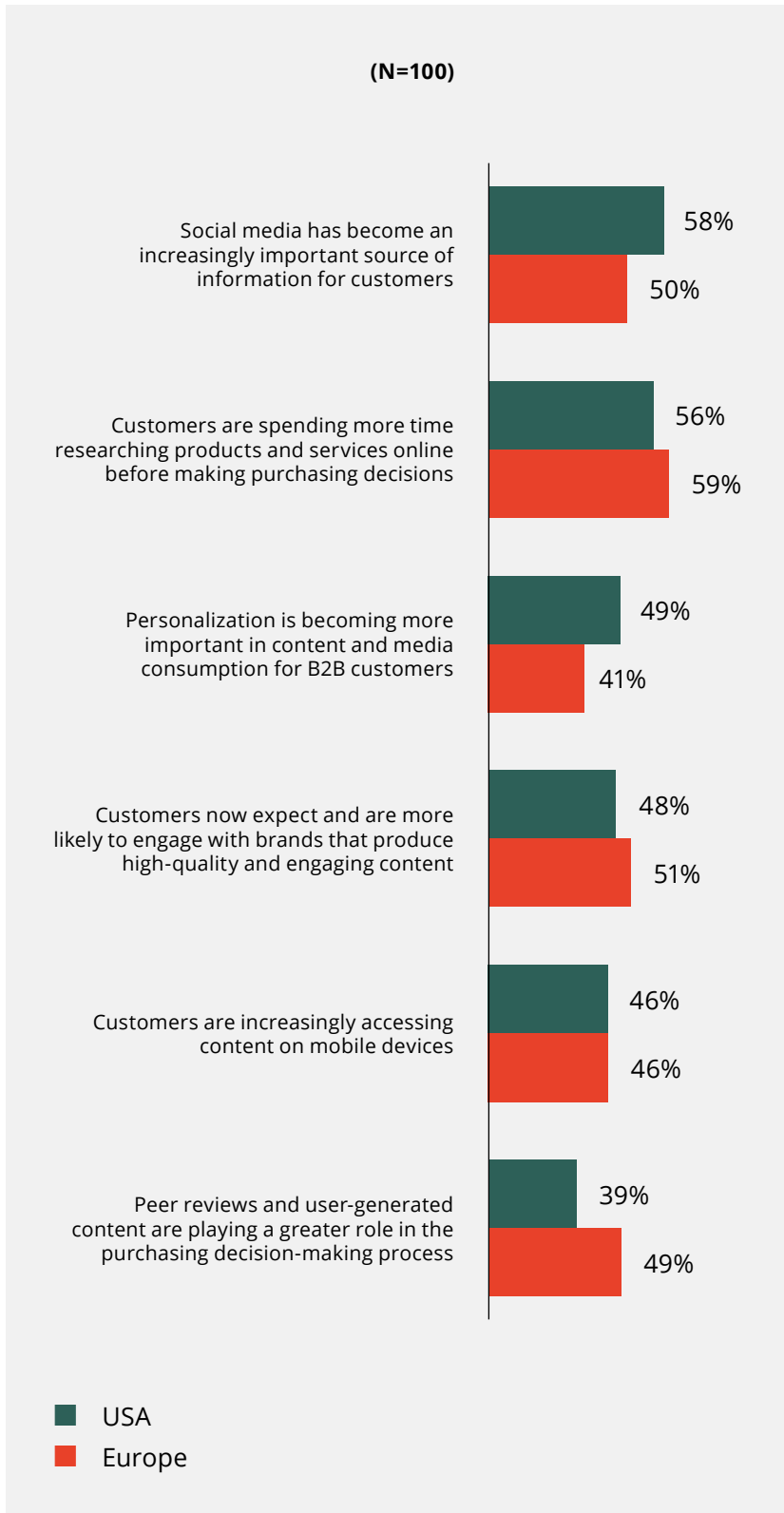
“

B2B is also undergoing consumerization as consumer expectations bleed into B2B buying expectations. Baby boomers and Gen X have been taken over by millennials who now have influence and decision-making power. Digital savvy, mobile first, use digital interactions for consideration. The self-directed buying journey moved deeper into the purchasing process. Some buyers get 70% of the way into the purchase that buyers engaged the prospective company.

”

- President,
US Digital Transformation Agency

FIGURE 2 – SOCIAL MEDIA PLAYS A BIGGER ROLE IN THE US, WHEREAS IN EUROPE CUSTOMERS ARE RELYING MORE ON PEER REVIEWS



Winterberry Group Survey (2023)

A SHIFT TO HYBRID EVENTS

IN-PERSON EXPERIENTIAL MEETS DIGITALLY ENABLED VIRTUAL

The COVID-19 pandemic has undeniably served as a catalyst for a seismic shift in the B2B marketing landscape. As traditional marketing methods and in-person events faced unforeseen challenges, businesses quickly pivoted to an accelerated embrace of digital marketing and virtual events.

In-person conferences, trade shows, and networking events, once cornerstones of B2B marketing, have given way to an innovative wave of complementary digital tactics. Webinars and virtual events have emerged as key instruments in the marketing toolbox, providing an avenue for businesses to reach their audiences, maintain relationships, and generate demand in this new era of remote interaction.

As Covid continues to redefine norms, B2B marketers are finding themselves at the forefront of a digital transformation, harnessing the power of technology to bridge physical gaps and continue delivering value to their audience. This underlines the adaptability and resilience inherent in the B2B marketing sector, even in the face of such dramatic change.

As we step further into a post-pandemic business environment, Winterberry Group forecasts for 2022 and 2023 indicate a significant rebound in experiential marketing spending in the US, driven by the return to in-person events and experiences. This surge, supported by digital advancements and virtual experiences, will enhance customer engagement and brand loyalty. Despite predicted growth from \$16.33 billion in 2022 to \$18.16 billion in 2023 it will remain below the pre-pandemic peak of \$19.86 billion in 2019 (Winterberry Group Spend Analysis, 2023).

The paradigm shift towards a blend of in-person combined with virtual experiences prompted by the pandemic is here to stay, despite the gradual return of in-person events. As face-to-face events resume, companies are maintaining these virtual offerings

to tap into a wider audience base and ensure accessibility, with pre-event marketing to drive audience, digital amplification during the events and post event digital marketing including replays of sessions via webinars and podcasts.

According to the survey, 38% of respondents reported an increased reliance on both in-person and online experiential and event planning. On the other hand, 36% chose to boost their online event marketing at the expense of in-person strategies, underscoring the ongoing importance of digital experiences in the experiential marketing landscape.

“

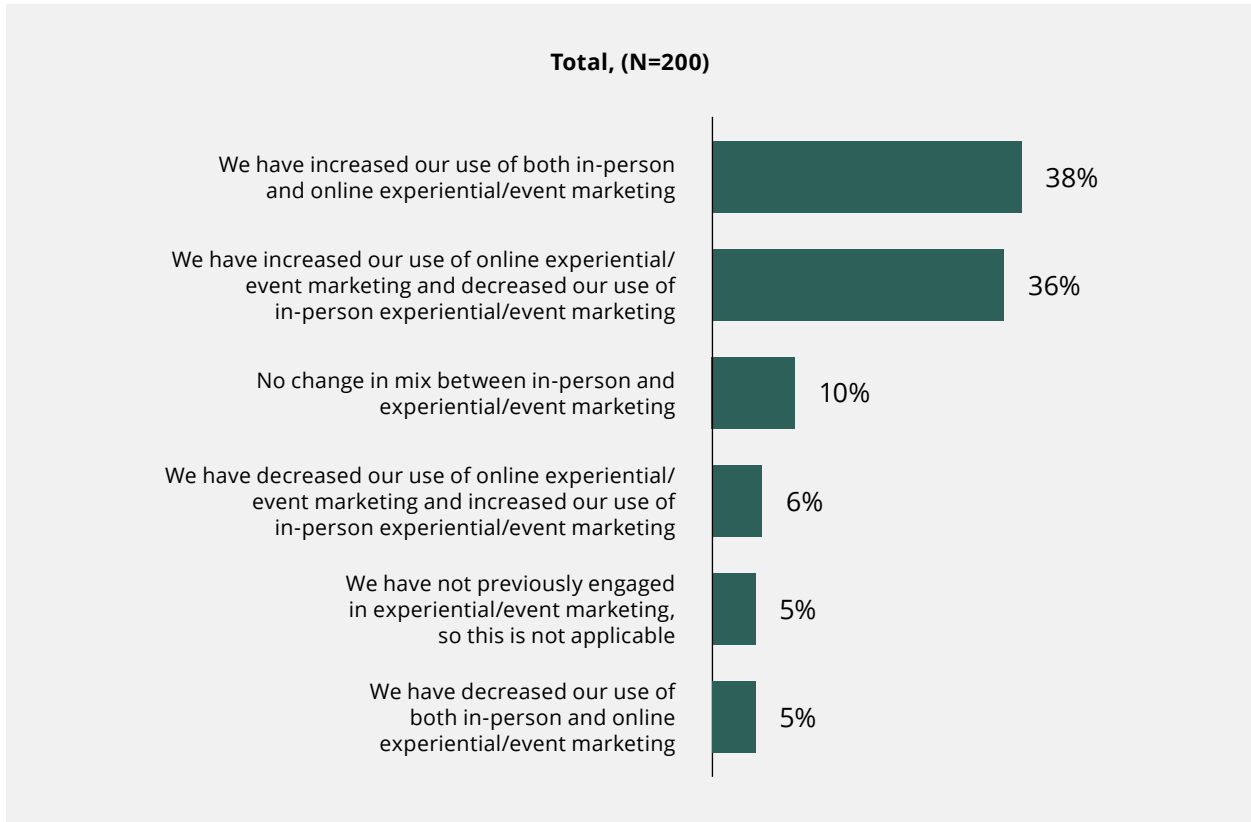
All of our clients are back into an experimental mindset. Part of that is due to digital saturation and falling metrics. A lot of companies could not sustain or evolve digital experiences to match in person. The commercial value of events also dropped for clients. Today, people still want digital reach and are trying to maintain it but it's expensive to do in-person events with a compelling digital component. It's definitely back but there will always be a place for digital.

”

- Chief Growth Officer,
Global B2B Marketing Agency



FIGURE 3 – THE MAJORITY OF RESPONDENTS INCREASED BOTH ONLINE AND IN-PERSON EVENT/EXPERIENTIAL MARKETING; HOWEVER, IN-PERSON STILL CONTINUES TO BE IMPORTANT



Winterberry Group Survey (2023)



THE RAPID ADOPTION OF INTEGRATED OMNI-CHANNEL MARKETING

Marketing departments are under greater scrutiny, tasked with delivering strategic plans that are not only innovative and engaging but also capable of demonstrating clear, measurable returns on investment.

In a shifting marketing landscape, the equilibrium between offline and online advertising expenditures is seeing a notable transformation. However, it's crucial to note that within the B2B market, the swing towards digital hasn't been as pronounced as within the B2C segment, where online has become the prevailing approach, commandeering over 60% of the total spend (WG Spend Model, 2023).

“ We need to increase omnichannel and we need to personalize. You also need a data platform and personalization tool. I think B2C platforms are more advanced in terms of marketing. ”

- CEO, European CRM Provider

The COVID-19 pandemic catalyzed a rapid embrace of integrated omni-channel marketing. The emergence of remote work models and the fusion of in-person and digital experiences urged businesses to pivot toward digital avenues for engaging with customers and prospects.

“ From our perspective, the integration of products within campaigns – for example, adding digital to content syndication programs – allows marketers to target the same audience in multiple ways. In addition, this has allowed B2B salespeople to be more consultative in their selling strategy and approach in meeting customers' needs, rather than focusing on selling a product. ”

- CRO, Global B2B Solutions Provider

From our vantage point, the reshaped marketing funnel demands a holistic integration of campaigns across all platforms, allowing marketers to target identical audiences through different mediums. This evolution requires B2B sales personnel to adapt their strategies, focusing more on integrative consulting rather than merely pushing their products. These new dynamics are reshaping the customer journey, blending the best of digital and in-person experiences.



Unpacking the components of the digital mix, paid social is one of the fastest-growing channels, fueled by the ascendancy of LinkedIn across all market segments, and the growing presence of Meta in the mid-market and SMB segments. Nevertheless, this adoption rate varies across regions, with significant differences between the US and European markets.

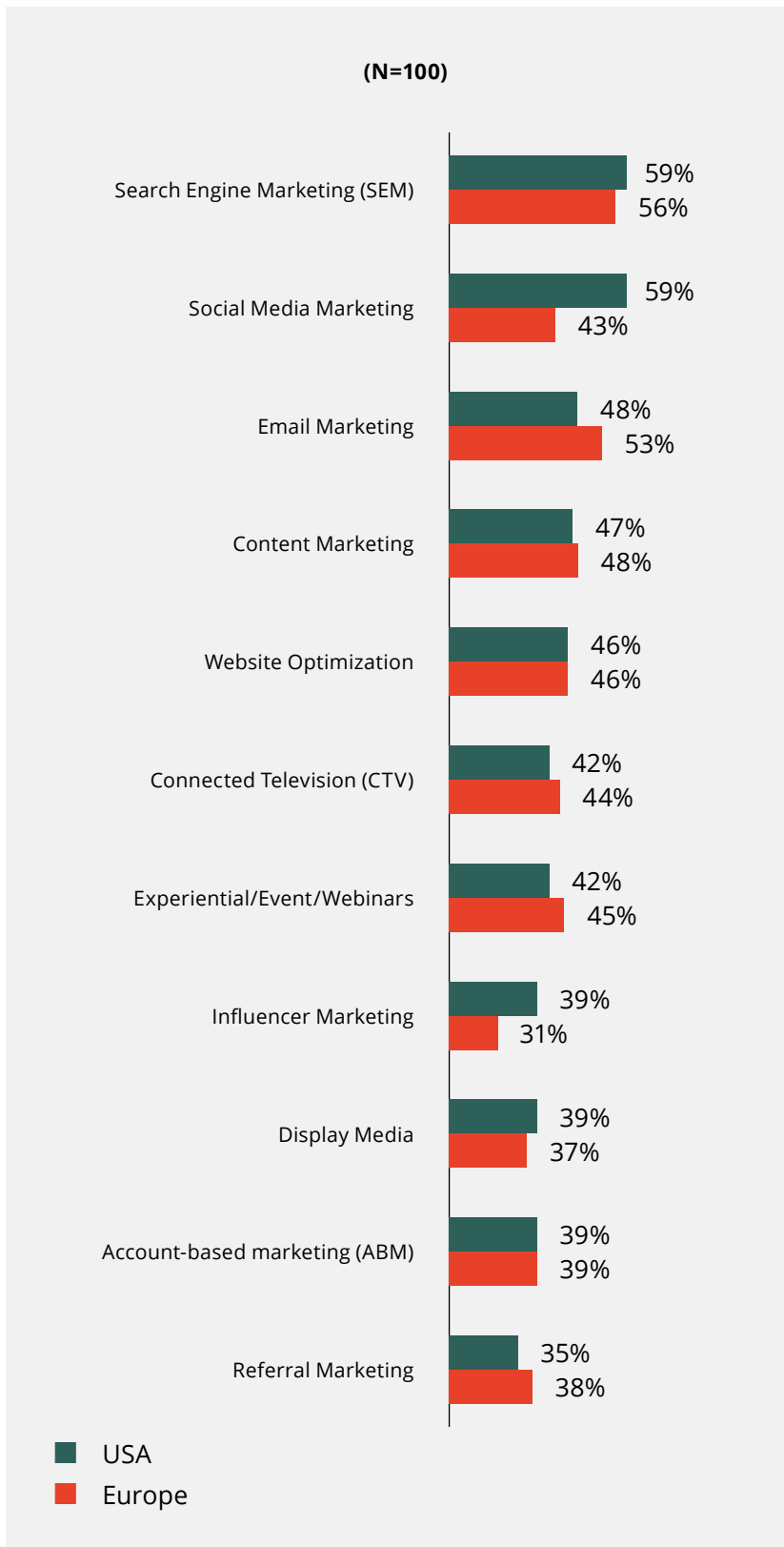
“ In Europe, paid social in the B2B sector is lagging behind. The adoption curve is slower, and I have personally perceived this as a prevailing trend. There seems to be an insularity within the market, which has a chilling effect on the pace of these shifts. ”

- VP of Marketing,
B2B Social Platform

Encouragingly, the survey suggests globally, marketers feel confident about their progress towards integrated omni-channel marketing, with 48% believing they have fully integrated their efforts and 46% seeing partial integration. Respondents in Germany were particularly optimistic, with 74% considering their efforts as fully integrated.

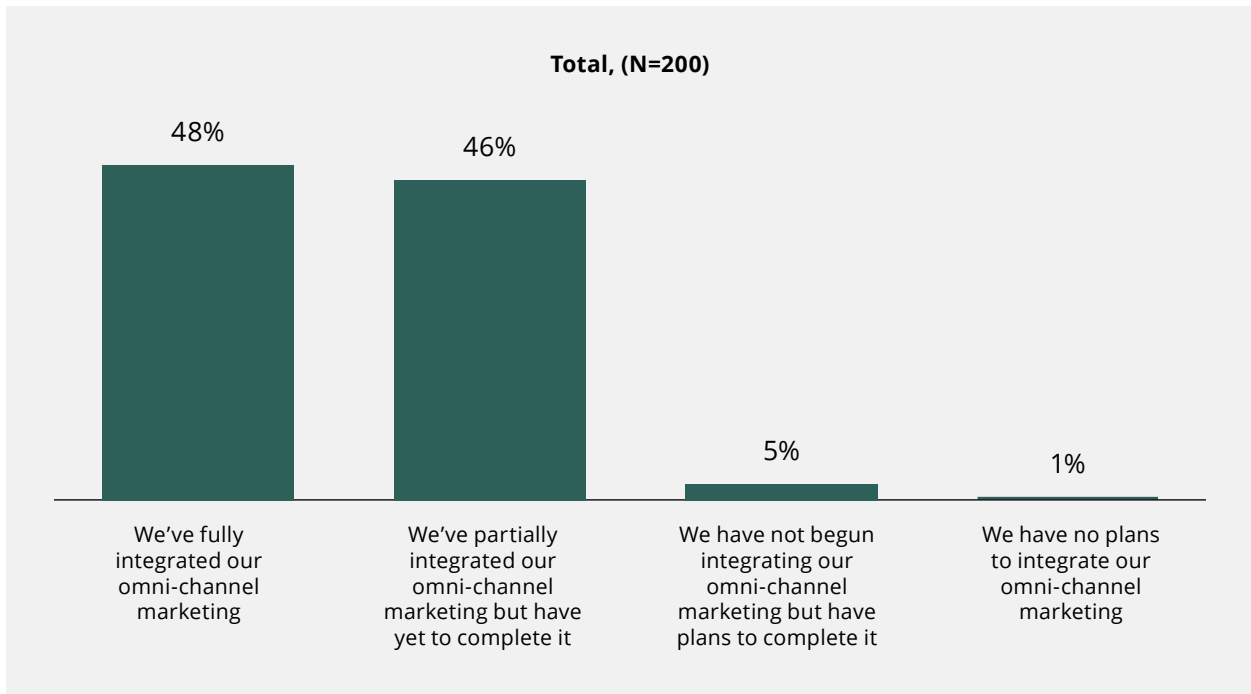


FIGURE 4 – SOCIAL MEDIA IS A MORE COMMON TACTIC IN THE US COMPARED TO EUROPE



Winterberry Group Survey (2023)

FIGURE 5 – RESPONDENTS EITHER FULLY INTEGRATED OR PARTIALLY INTEGRATED THEIR OMNI-CHANNEL MARKETING EFFORTS



Winterberry Group Survey (2023)



CHANNEL PROLIFERATION DRIVES INCREASED CONTENT DEMAND

The modern digital landscape, replete with a proliferating number of channels, has precipitated a significant surge in content demand across various platforms. Businesses, in response to the advent of social media, mobile technologies, and other digital conduits, are increasingly tasked with the consistent production of high-quality content to captivate their target audiences.

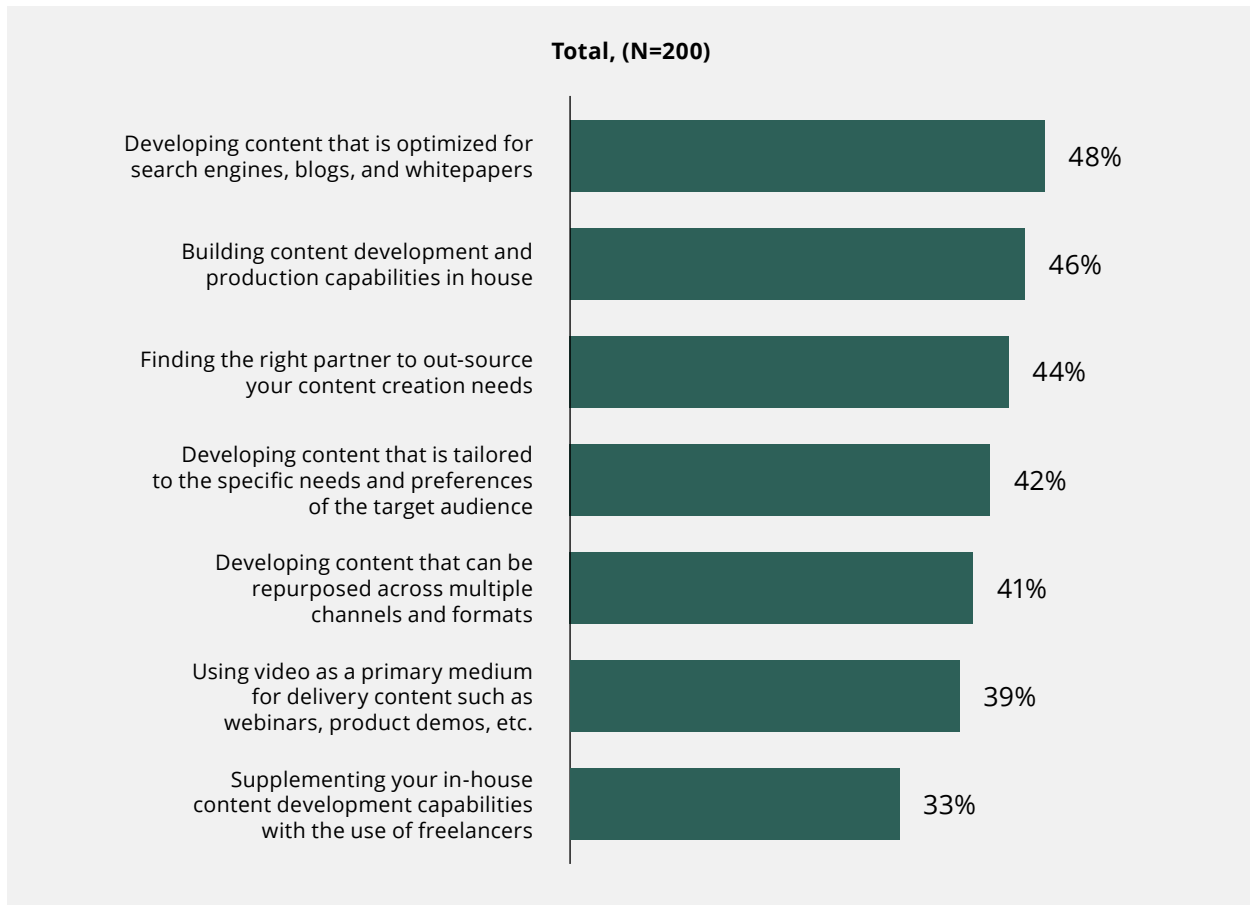
This burgeoning content demand, however, is not without its challenges. Businesses now find themselves grappling with the task of generating content that isn't just pertinent and engaging, but also intricately optimized for distinct channels and devices.

The survey brings these challenges to the forefront, revealing the top concerns for B2B marketers in today's content-driven era. Topping the list is the development of content that is meticulously optimized for search engines, blogs, and whitepapers, with 48%

of respondents citing this as a key concern. Closely following, at 46%, is the challenge of building in-house capabilities for content development and production.

These findings underscore the shifting priorities in the B2B content landscape, underscoring the pressing need for businesses to either develop robust internal content creation capabilities or find process driven external partners.

FIGURE 6 - KEY B2B CONTENT PRIORITIES INCLUDE BRINGING CONTENT CREATION IN-HOUSE AND FINDING THE RIGHT PARTNERS IF THEY ARE OUTSOURCING



Winterberry Group Survey (2023)

THE IMPORTANCE OF BRAND IN B2B

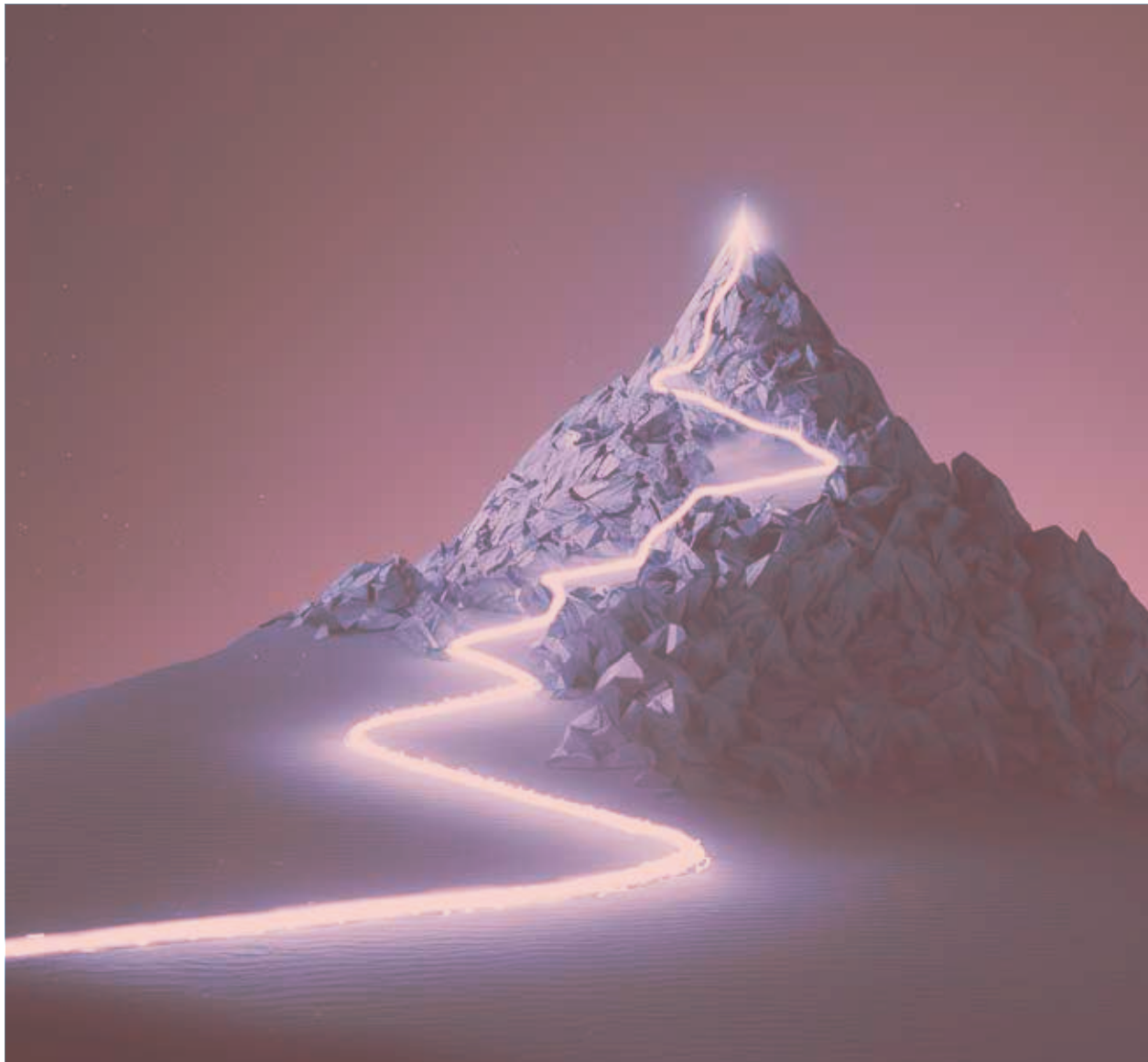
As major B2B participants navigate the more complex decision-making environments, where many more of the steps are carried out online rather than via a face-to-face relationship, the role of a strong brand has become more important.

The value of investments in brand marketing in B2C has been well established, with the approach to measurement built on share of voice. Where a brand's share of voice exceeds their market share it has been established that in most circumstances this leads to sales growth.

Research from Brand Finance (UK, May 2023) suggested that the aggregate value of the top 100 brands in B2B is \$2 trillion, compared to \$2.7 trillion for the B2C sector. For the largest companies the brand value of individual B2B providers is such that investing in brand communications to explain the role of

these companies is seen as essential for both internally facing and externally facing audiences.

While there has been significant focus on lower funnel activities, the power of branding, and elevating the brand in a more digital world is allowing marketers to better fill the top of the marketing funnel both longer and more consistently, serving as a complement to mid-funnel activities in the customer journey. As the market evolves, we expect a better balance of brand investment occurring in the market – though always subservient to performance marketing for B2B.



DATA AND ANALYTICS IN B2B MARKETING

In the rapidly changing landscape following the global pandemic, a more targeted focus on customer data and the integration of new technologies has become paramount. Marketers are leveraging analytics to utilize data infrastructure solutions in a more sophisticated manner, aiming to enhance decision-making by optimizing customer journeys, understanding product performance, and predicting both creative asset performance and promotion success.

“ Data and analytics are where most B2B investment needs to go. Some have gone there of course but a lot more need to. We all need to get much more sophisticated on the front end and on the back end analyzing it, particularly forecasting. Right now, that's one of the hardest things for us to do. ”

- CMO, Global B2B Solutions Provider

However, the hurdles of data collection and integration remain prominent within organizations, impeding data-driven business decisions. In the survey, marketers cite data quality and the frequency of data updates as the principal pain points inhibiting the effective use of data and analytics to boost performance.

“ We have enough data, but we don't know what to do with the data. We would benefit from qualitative data and feedback from buyers, etc. We are organizing the data around criteria for LinkedIn and search to filter out population, but it doesn't say anything about the maturity and the qualitative data is missing. ”

- CMO, European B2B Content Marketing Agency

The avalanche of data being produced daily compounds these issues, with businesses grappling with data availability, quality, and utilization. To overcome these challenges, B2B marketers are investing in new tools to complement sales driven CRMs including customer data platforms, data visualization tools on top analytics environments supported by data clean rooms- all designed to effectively manage and interpret vast data quantities.

To complement the data driven shift, the area of measurement and attribution within B2B marketing is also seeing a surge in more sophisticated models. These models include techniques for multi-touch attribution, which assigns credit to multiple touchpoints across the customer journey, and marketing mix modeling, which uses statistical analysis to measure the impact of different marketing channels on business outcomes.

“ For B2B marketing, measurement and attribution is important. We run ads on performance, so the fact that we can have a source of truth on how much we've spent and how much we've generated is very critical. ”

- Co-Founder, US B2B Marketing Agency

This adoption, again a result of the increased availability of data and the escalating significance of data-driven decision making, is enabling better comprehension of the impact of marketing efforts on business results, now inclusive of factors like lead quality, sales cycle length, and customer lifetime value.

The changes in the availability, volume and velocity of data and content have led to a major inflection point in the market - the use of **generative or conversational AI**, which is expected to dominate the next wave of technology adoption and data usage. Initial use cases include customer service, content development and process streamlining.

AI is primarily used for process optimization, such as testing, personalization, writing and proofing copy, upscaling of existing content and creative but has capabilities to create new creative and content. Concerns exist regarding errors, copywriting, and intellectual property implications.

“ Many marketers will use ChatGPT to make volumes of things. They will make people sinister of what will actually provide value. B2B marketers are remedial and not very strategic. My fear is that people will use these tools that won't serve themselves or the market very well. It can make people create bad content. The reason you have an agency is because creativity is not content. ”

- Chief Marketing Officer, Global ABM Provider

However, applications of AI are not limited to conversational, but are more mature in the use of **machine learning** to drive audience targeting, optimization and measurement. Machine learning has

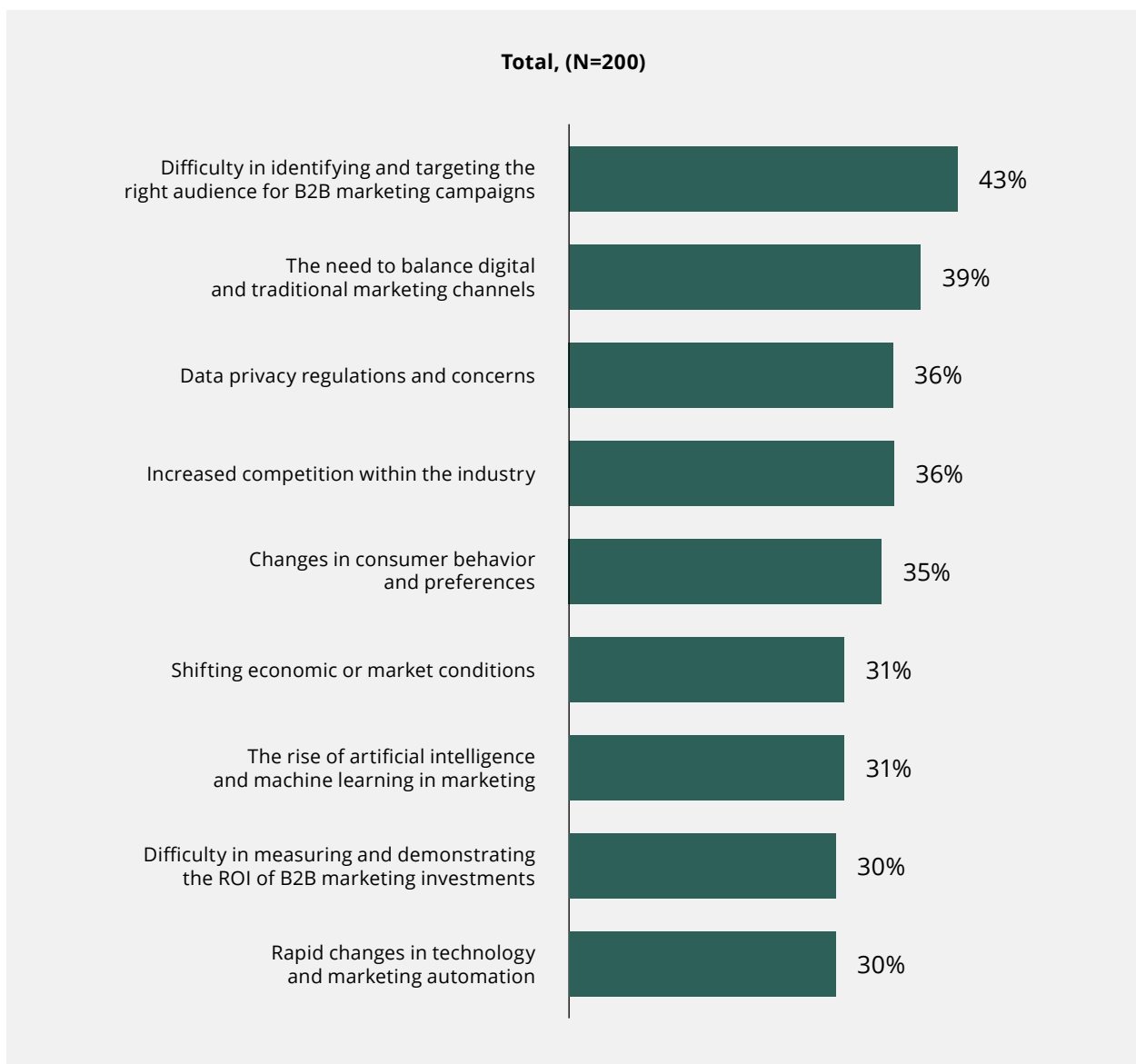
been helping B2B companies improve precision, efficiency, and effectiveness of their marketing efforts by involving the automation of routine marketing tasks, enabling efficient and accurate analysis of vast amounts of data, and enabling personalized customer interactions.

Looking into the next 36 months, B2B marketers are anticipating that technology adoption and data-related challenges will be both their main pain points and primary opportunities over the next three years. Among these challenges, the difficulty in identifying the right audiences stands out as a top concern for 38% of marketers, while data privacy and regulations are worrying 35% of US marketers. These issues highlight the importance

of having a solid data strategy and the need for marketers to stay up to date with changes in data privacy laws. Finding the right balance between targeting the right audience while respecting their privacy will be a critical focus for B2B marketers in the years to come.

Though challenges around regulation, ownership, misinformation, and transparency are all gating factors, the role of AI in B2B marketing is expected to grow in importance as businesses seek to leverage the technology to gain a competitive edge with speed to insight, improved optimization and the ability to deliver cost and time effective content at scale.

FIGURE 7 – DIFFICULTY IN IDENTIFYING AND TARGETING THE RIGHT AUDIENCE, AS WELL AS BALANCING DIGITAL AND TRADITIONAL CHANNELS, ARE AMONG THE GREATEST B2B MARKETING CHALLENGES



Winterberry Group Survey (2023)

NAVIGATING AN INCREASINGLY COMPLEX TECHNOLOGY INFRASTRUCTURE

The proliferation of Martech tools has resulted in escalating complexity in B2B marketing, making it challenging for businesses to manage and integrate these disparate tools. The tools include infrastructure management, decisioning and orchestration, and activation solutions that facilitate engagement and guide buyers through the customer journey.

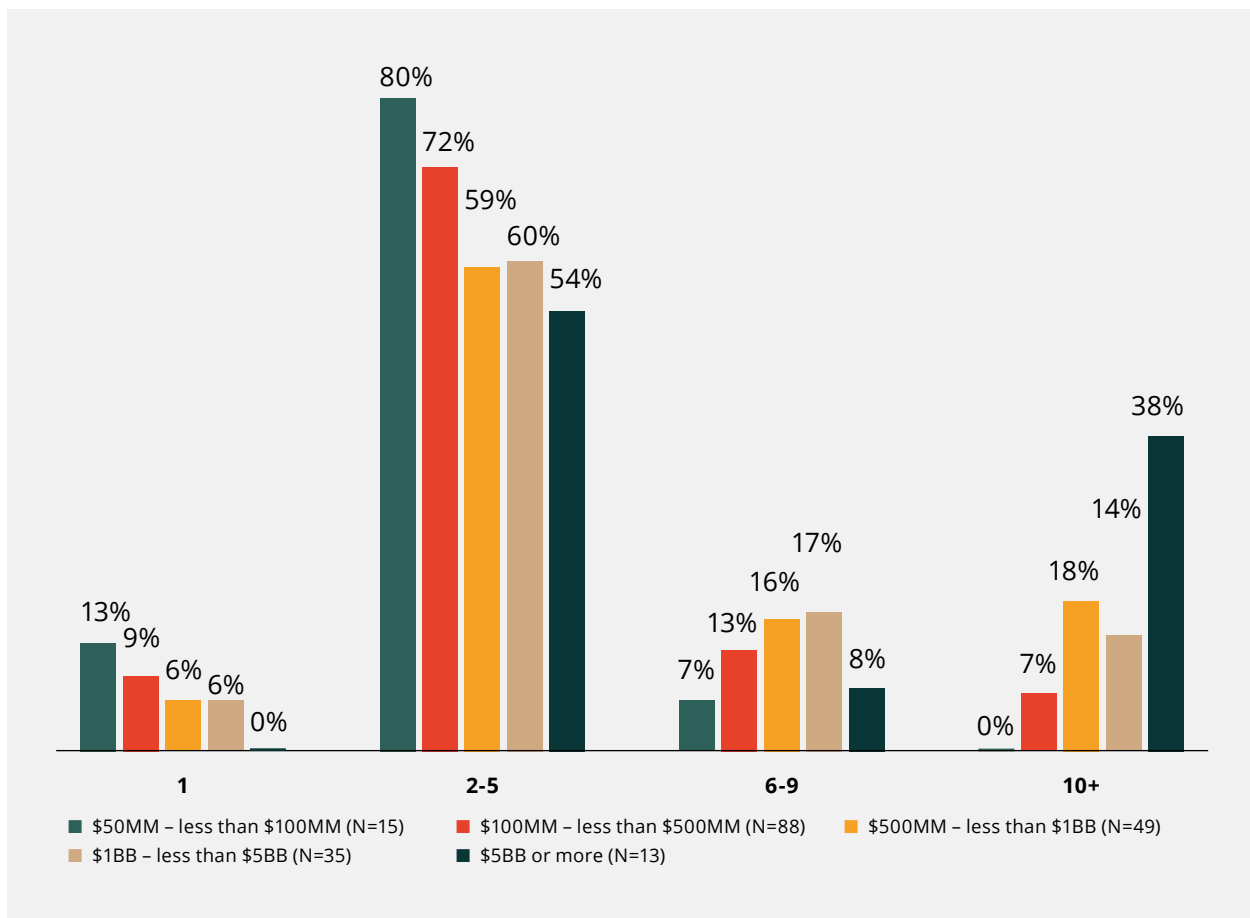
According to the survey, the majority of B2B businesses employ 2-5 tools or services to bolster their marketing endeavors. Notably, higher-revenue companies tended to use more tools, with businesses earning \$5 billion or more utilizing ten or more tools (38% incidence).

As the complexity of marketing data intensifies and data-driven decision-making grows more vital in B2B marketing, there has been a surge in demand for marketing analytics. Many companies have recognized the need to invest in building in-house capabilities for data analytics. However, the

establishment and maintenance of an in-house analytics team requires substantial investment in terms of time, finances, and resources.

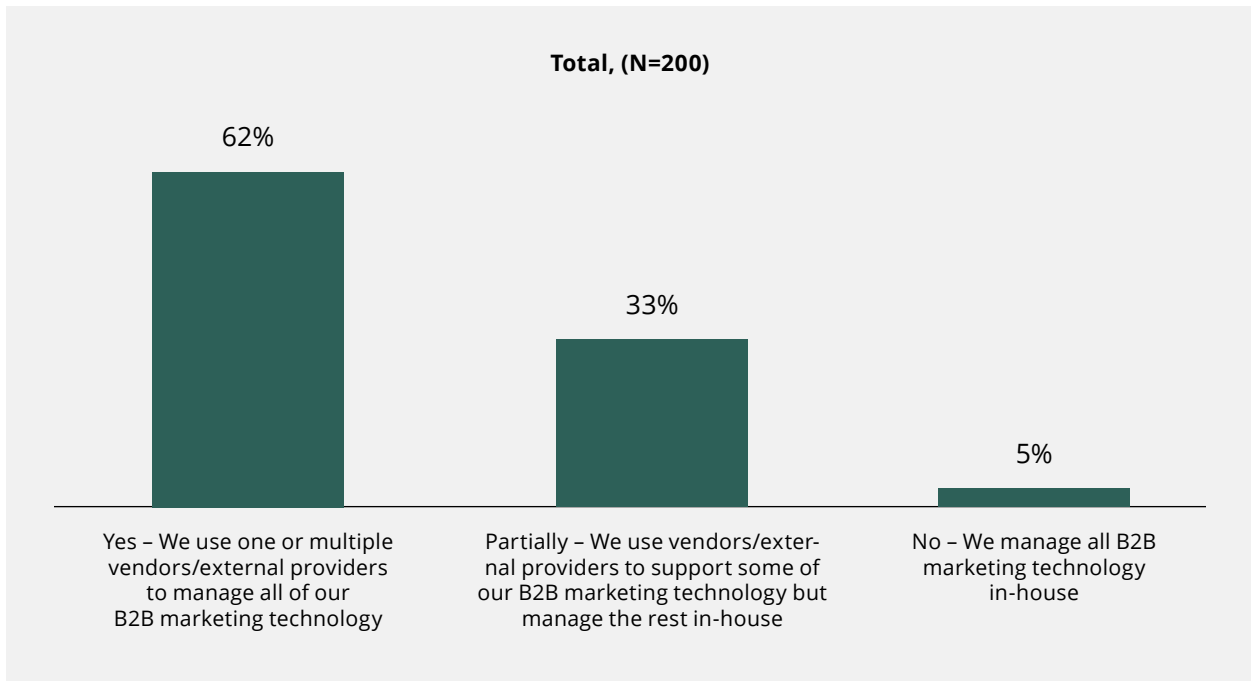
Consequently, many B2B companies are gravitating towards third-party providers to address this need. According to the survey, a notable 62% of respondents reported using one or multiple vendors/external providers to handle their B2B marketing technology needs, with a mere 5% managing all technology in-house.

FIGURE 8 – COMPANIES WITH HIGHER REVENUES ARE MORE LIKELY TO USE 10 OR MORE TOOLS



Winterberry Group Survey (2023)

FIGURE 9 – MAJORITY OF RESPONDENTS USE EXTERNAL VENDORS TO MANAGE B2B MARKETING TECHNOLOGIES



Winterberry Group Survey (2023)



MOVING UNEVENLY TOWARD A COMMON FRAMEWORK IN THE US, THOUGH GDPR PROVIDES MORE CLARITY ACROSS EUROPE

As B2B marketers increasingly employ data-driven solutions to guide their decision-making processes, the concern over data privacy is the leading inhibiting factor for integrated omni-channel marketing.

The ever-increasing emphasis on regulatory and privacy concerns has begun to cast a significant shadow over the B2B marketing landscape. As regulations become more stringent, the scope of customer engagement and communication may become constrained, particularly in the context of burgeoning environmental, social, and governance (ESG) compliance, a phenomenon more pronounced in Europe. Consequently, B2B marketers may encounter hurdles in identifying the right audiences and crafting tailored messaging compliant with these regulations.

“
“In terms of privacy, a lot of people on the executive side look at this and are terrified of what it could do to their business and want to be cognizant and clear of what they're doing and how we manage their data.
”

- Chief Product Officer,
Global B2B Solutions Provider

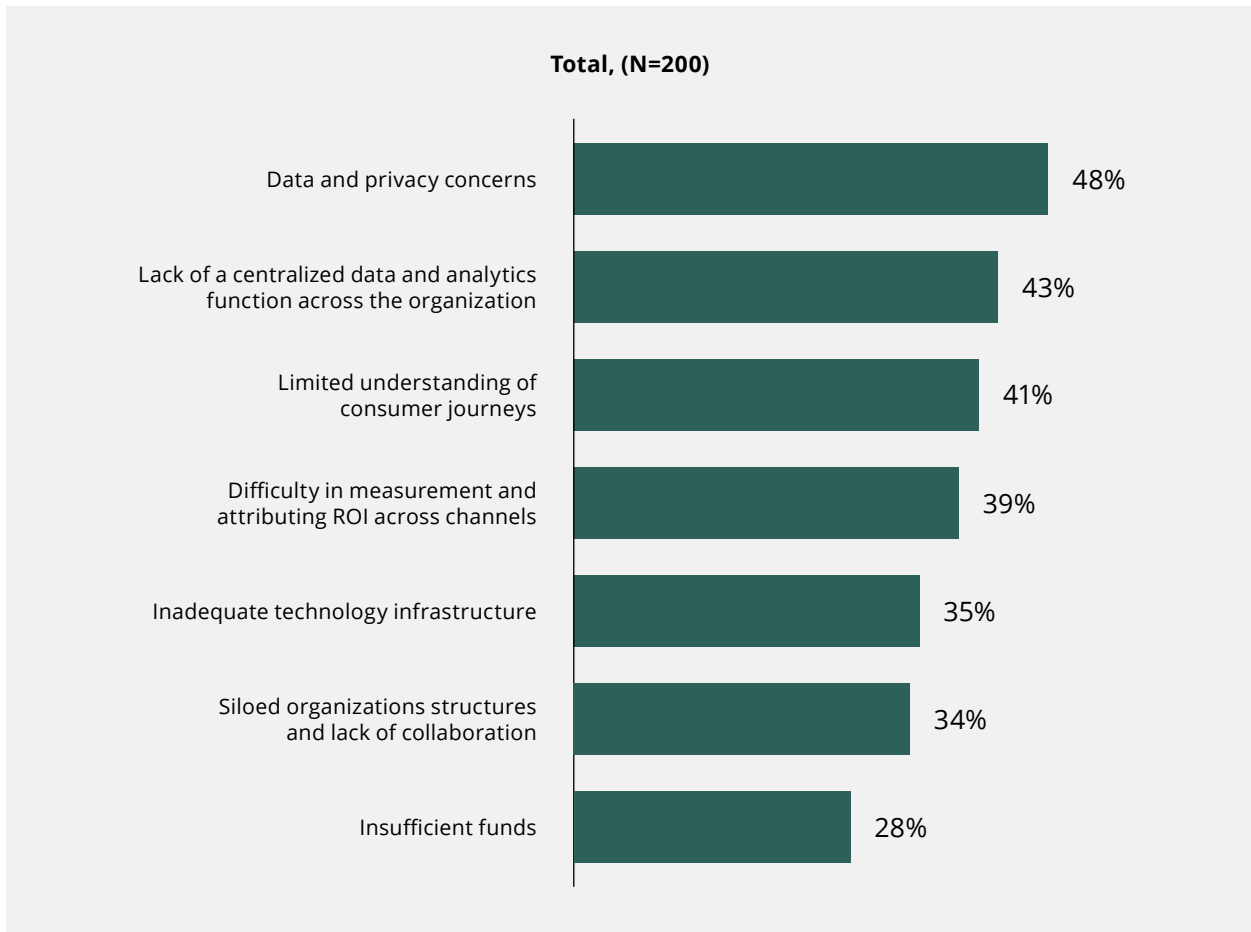
Increasingly, executives are expressing concerns over privacy issues within B2B marketing, as the call for transparency and accountability in data usage threatens to curtail the pool of customer data accessible for marketing campaigns.

The impact of regulations is already palpable in the European markets, but in the US, the approach to B2B privacy regulation is relatively uneven, largely owing to the state-specific nature of the legislation. In the absence of federal regulations, states like California are implementing restrictions on B2B marketing, while others like Indiana may completely exempt B2B marketers, regardless of company size.

It is our current expectation that browser actions will continue to impose a more consistent constraint on the capacity to activate and measure B2B marketing, with eventual federal legislation likely to provide a clearer set of guardrails. Until then, managing B2B to the highest standard in the US and in compliance with GDPR will be viewed as best practice, thereby bolstering trust with brands, and enabling them to maintain consent in line with permissible use.



FIGURE 10 – DATA-DRIVEN CONCERNS INHIBIT INTEGRATED OMNI-CHANNEL MARKETING



Winterberry Group Survey (2023)



INDUSTRY PAIN POINTS, OBSTACLES AND OPPORTUNITIES

The continued evolution of B2B marketing is going to be further impacted by the need to transform the organization across marketing, sales, and sales channels. Solving for the better use of data and technology are just two of the challenges executives face.

Organizational Alignment: In today's evolving business landscape, aligning marketing efforts across multiple disciplines, such as brand, performance and experiences, poses a considerable challenge. The reality is that each business unit often operates with distinct success metrics, goals, and compensation structures.

“ The incentives are not uniform. Salespeople are driven by commission, which is not always the case for marketers. I am a firm proponent of bringing marketers into the same compensation structure as sales teams. This alignment can ensure mutual objectives and synergies. ”

- CEO, European Digital Marketing Agency

Covid-19 spurred a transition towards a more digitally centric business model, urging B2B organizations to reassess their internal structures. This digital transformation may necessitate upskilling and re-skilling of employees, as well as adjustments to

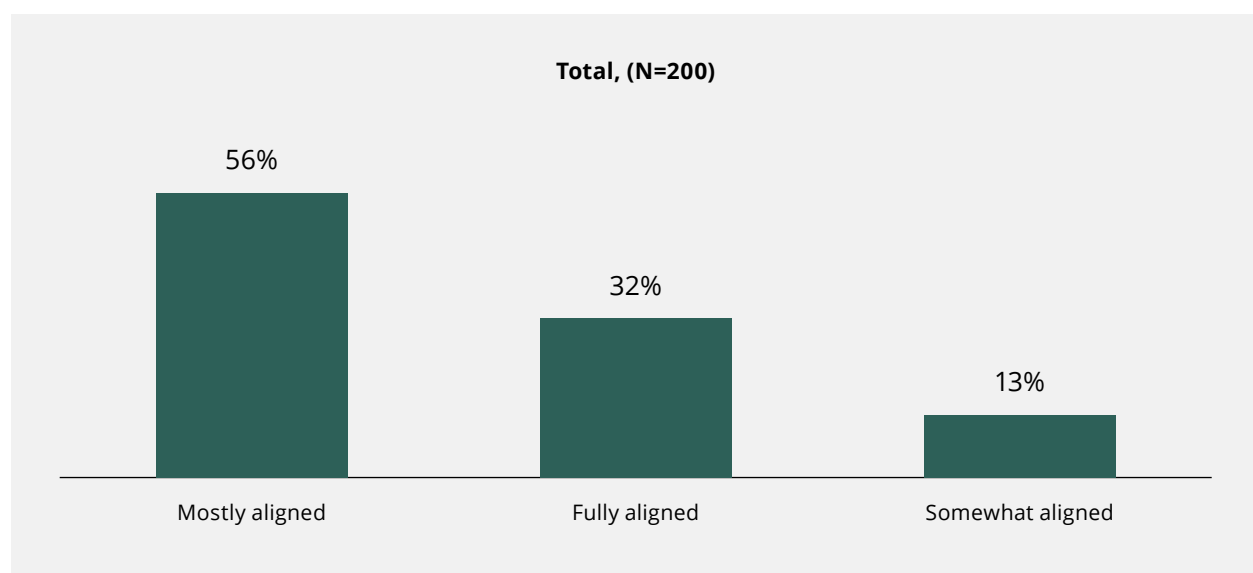
organizational structures and processes, to better align with a digitized marketplace's demands.

Despite these hurdles, brand marketers are expressing a positive outlook. A substantial 56% perceive significant progress in aligning their business units, expressing that their marketing department is mostly coordinated across brand, performance, experiential, and technology functions. This development points towards a growing convergence in marketing disciplines, indicating a promising future for integrated marketing efforts.

Alignment between Marketing and Sales: The synergistic alignment of the marketing and sales organizations is a critical focus for businesses today. In the US, the survey data reveals that 56% of respondents consider their marketing departments as mostly aligned with the sales organization, while 29% perceive full alignment. European respondents, however, demonstrate a more optimistic view, with 61% reporting that their organizations are mostly aligned.

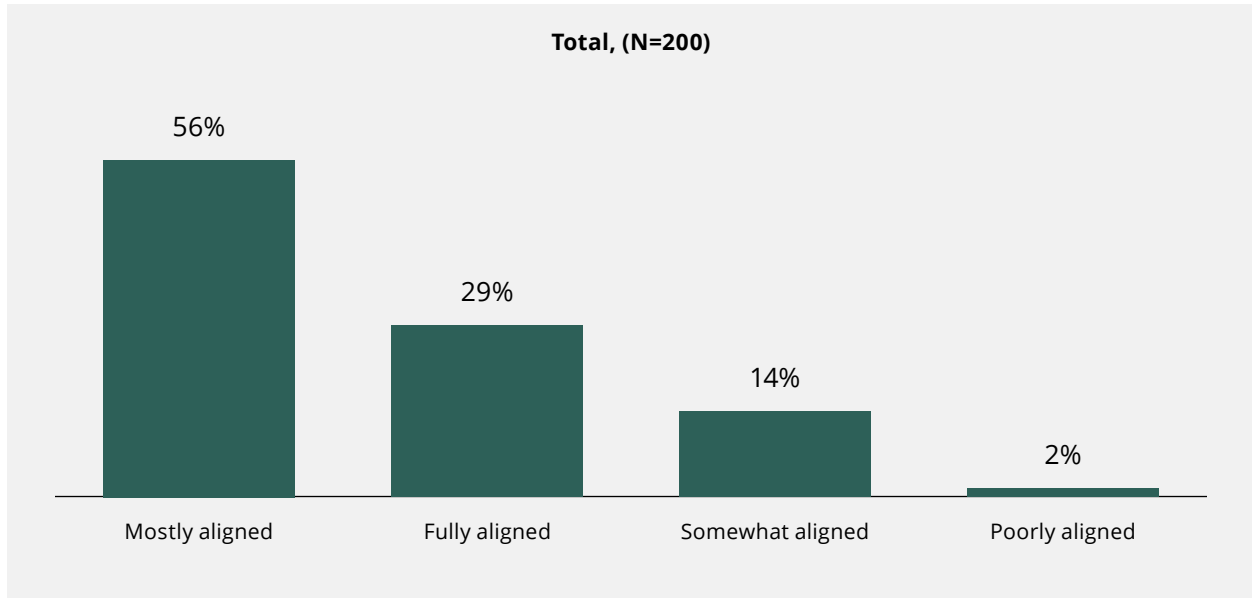
Despite this encouraging trend, considerable challenges persist in aligning the goals, roles, and responsibilities of marketing and sales divisions. Data tracking and management issues, along with process misalignments, stand out as the most prominent pain points. The complexity of data management is exacerbated when

FIGURE 11 – RESPONDENTS VIEW THEIR MARKETING DEPARTMENT TO BE MOSTLY ALIGNED BETWEEN BRAND, PERFORMANCE, EXPERIENTIAL AND TECHNOLOGY FUNCTIONS



Winterberry Group Survey (2023)

FIGURE 12 – RESPONDENTS VIEW THEIR MARKETING DEPARTMENT TO BE MOSTLY ALIGNED WITH THE SALES ORGANIZATION



Winterberry Group Survey (2023)

disparate systems and tools are deployed across different teams, resulting in friction and inefficiencies that can result in missed opportunities and stagnated revenue growth.

Alignment of Metrics and KPIs: Moreover, the survey identifies a significant gap that needs addressing in the US context: the discord in metrics and KPIs used by sales and marketing divisions. In Europe, a larger issue seems to be the lack of communication or collaboration between teams. This dichotomy underlines the critical role of incentive alignment in driving KPI achievement. Constructing incentive structures that uniformly reward sales and marketing functions can create a powerful motivational force, driving performance and delivering superior results.

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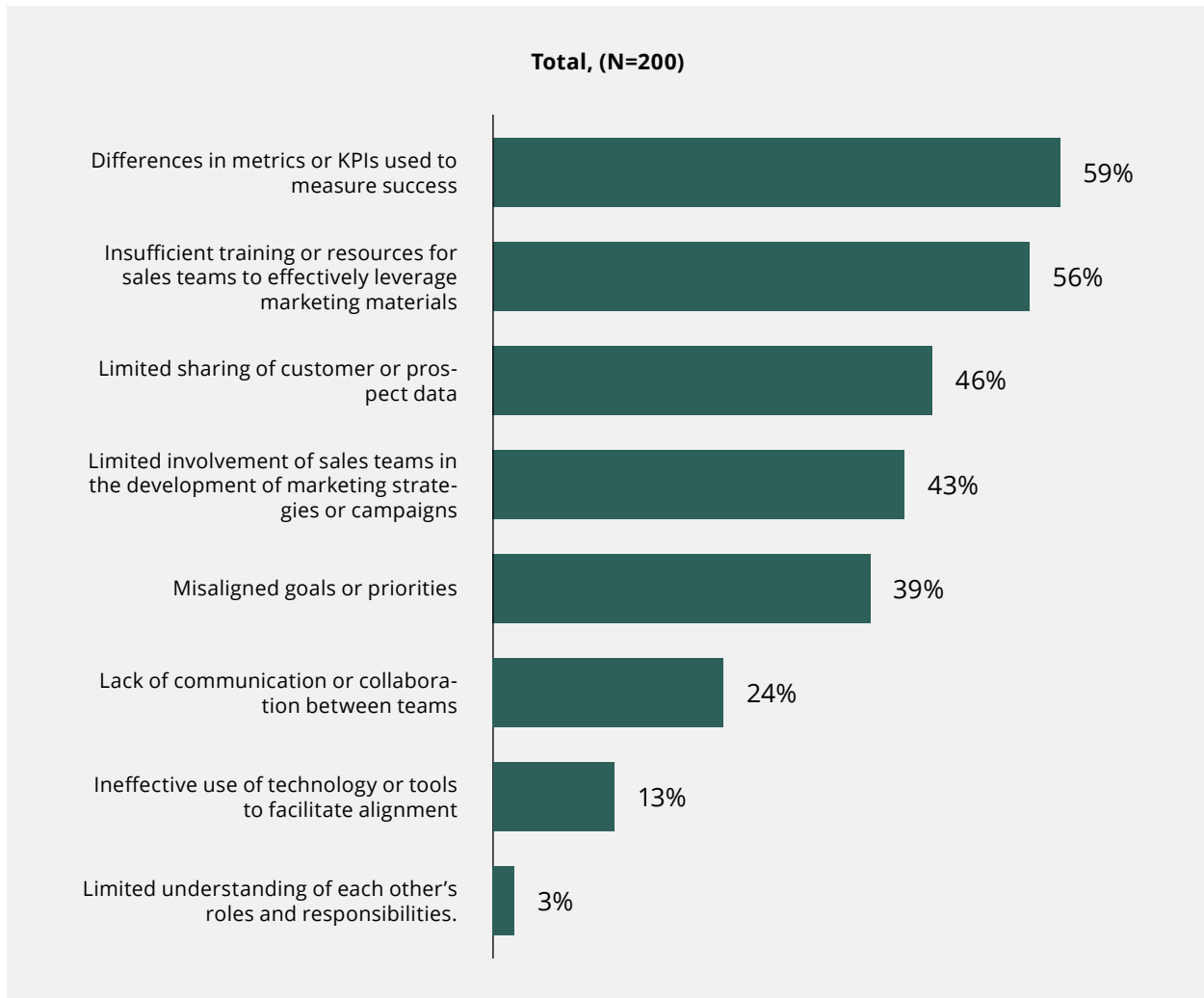
The obvious first step is the division of brand and demand in marketing organizations. We still see to the detriment of our ability to work with brand and demand [teams], competing internal factions. There are organization, efficiency, and budget divides that I still see as quite a challenge. Fissures within organizations make it hard to have a holistic view of effectiveness. They don't have the right rubric in place.

”

- Chief Growth Officer,
Global B2B Marketing Agency



FIGURE 13 – DIFFERENCES IN METRICS USED TO MEASURE SUCCESS AND INSUFFICIENT TRAINING ARE AMONG THE TOP GAPS FOR MARKETING DEPARTMENT AND SALES ORGANIZATION ALIGNMENT



Winterberry Group Survey (2023)

Direct and Indirect Channel Conflict: The landscape of sales channels is undergoing a substantial shift, most notably marked by the rapid surge in e-commerce platforms. This transition offers businesses increased control over their sales processes and the management of customer data. However, it also introduces substantial challenges, particularly to channel relationships.

While the trend of going direct-to-consumer continues to grow, partner marketing maintains its relevance in sustaining high traffic volumes and boosting brand visibility. The importance of this dual approach should not be underestimated.

This evolution of sales channels underlines the need for businesses to continually reassess their marketing and sales strategies, ensuring they remain attuned to shifts in consumer behavior and channel dynamics. As e-commerce

“ The channels are changing and while selling direct might be interesting. We work with partner marketing and there are drivers for dealing with customers, etc. We work with US companies that help us with their clients and this is still a novel concept for businesses. ”

- CEO, UK B2B Marketing Agency

and partner marketing strategies continue to interplay, businesses that successfully leverage both stand to gain a competitive advantage.

Talent and Skills: The B2B marketing sector is grappling with distinct talent shortfalls across various specializations, including product marketing, marketing operations, and data analysis. Companies are finding it increasingly challenging to secure agile product marketers skilled in a range of competencies.

“ From a hiring standpoint, good product marketers are hard to find. You must be so agile and skilled in so many different areas. No one goes to college to become a product marketer. It’s core to B2B, own messaging, positioning, and core market fit. Marketing operations is a talent gap. With the shift to digital, changing expectations on measurement and outcomes it’s difficult. I’m measured on revenue and all the other metrics are leading indicators. ”

- CMO, Global B2B Solutions Provider

As the industry continues to pivot toward a more hybrid landscape, marketing operations face a talent crunch, intensified by evolving expectations for metrics and results. The demand to prospect on both a broad scale and with more personalized approaches necessitates strategic orchestration and adept personnel.

“ I believe that marketing needs to be more quant than creative. . . . It will be more technical and internally people need to be more financially savvy and understand numbers more than they were given credit for. The marketing operations would become quant. ”

- Chief Marketing Officer,
Global ABM Solutions Provider

“ There is a talent gap. We need to prospect on scale, and we need to think of how to orchestrate that. The issue with our clients is that they don’t have the right people on board. We cannot give them the tools without helping them. ”

- Managing Director, Global Demand Gen Agency

Such talent disparities are also prevalent across Europe, with a pronounced deficit of analytical talent. This specific shortfall underscores the burgeoning importance of data-driven decision-making and the imperatives for organizations to effectively leverage their data assets.

“ In European markets, we’re witnessing a dearth of analytical talent coupled with a lack of data strategy and integration services. ”

- CEO, European CRM Provider

To address these talent gaps, numerous companies in both the US and Europe are looking to external service providers, including managed services. This trend suggests a willingness among businesses to explore a broad range of internal and external solutions – with agencies and in-sourced providers being both onshore and near-shore to fill the gaps and remain competitive in an evolving marketplace.



MARKETING TRANSFORMATION IN A HYBRID WORLD

The accelerated consumerization of B2B. Over the next several years it is becoming increasingly clear that B2B's accelerated transformation during and post-COVID will continue and is likely to accelerate.

The adoption of artificial intelligence driven strategies and tactics – whether leveraging machine learning or conversational AI, are not the primary catalyst, the changes in buyer behavior– how products are discovered, the research and buying journey were going to change in any event and lead to the accelerated consumerization of B2B.

“ B2B has undergone a significant shift toward digital channels due to consumerization, the shifting demographics of buying decision makers, and the impact of COVID-19. The market is seen to continue moving forward in a hybrid manner, but brands still have significant work to do to successfully run omnichannel programs. Additionally, B2B is also undergoing consumerization as consumer expectations bleed into B2B buying expectations. ”

– President, US Digital Transformation Agency

The elevation of digital natives into decision making roles is leading to the change in buying behavior.

Generational change is one of the primary drivers of the next stage of B2B marketing, with millennials becoming the leaders in the buying process. As such, they are increasingly driven by their experiences as digital natives, where research begins online more, is validated by peers and via social media. This shift in marketing and sales approach will prioritize the entire customer journey, ensuring a trusted and consistent experience that drives brand loyalty.

“ Millennials have taken over the influence and decision-making power from baby boomers and Gen X. They are digitally savvy, prioritize mobile devices, and heavily rely on digital interactions during the consideration process. ”

– President, US Digital Transformation Agency

The buying journey will start and more often end online, though the path is not linear, as engagement moves more seamlessly between online and offline interactions.

Despite the shift towards online buying and searching, experiential marketing remains influential. Hybrid experiences become the norm, with outreach beginning online, and then moving through in-person experiences (as appropriate). The digital realm is not replacing the physical but complementing it, ensuring a comprehensive approach to engaging with audiences.

B2B Commerce will see significant continued expansion.

The buyer, and the buying groups, whether purchased by an individual, a steering committee or through procurement will move online. The outlook for B2B Commerce growth is currently expected to move from \$1.7 trillion in the US to \$2.5 trillion by 2026. In-line growth is expected in Europe, though we do not expect the percentage of buying online to equal that of consumer commerce.

Thought Leadership in combination with creative will drive brand trust in a crowded media and information market.

Volume and scale do not enable thought leadership. The right content, with transparency, that provides perspective and information will be used to drive trust – trust that will enhance buyer perception of the brand – and its products. It is expected that the flood of content, along with misinformation is going to continue to create both opportunities and challenges through the next several years until the consumer/buyer builds muscle (with digital AI support) that allows them to separate the good from bad. It is also expected that the battle between the owners of content (media companies) and the aggregators of content using AI enabled solutions will need to reach a level of agreement.

The execution of content and creative will see the greatest impact from AI.

How advertising and content is planned, created, briefed, executed are where investments in conversational AI are going to enable cost effective “content at scale and speed”. Creative, however, is more likely to be impacted by machine learning, with the ability to provide creative intelligence, versioning, and optimization- though not the “creative idea”.

The tech stack will see improved utilization across marketing and sales, with adoption driven by what should be done vs what can be done.

It is not going to be about “more” but about “how to get the most out of” to justify martech, sales enablement and adtech investments. This may result in fewer tools that are better integrated to support marketing/sales integration, removing the barriers that exist across product management, marketing, sales enablement, sales, and revenue operations. Investments in data infrastructure including CDPs, data clean rooms, cloud-based analytics environments, and AI enabled tool sets will see an increase, positively impacting the ability to target more precisely, accurately measure and deliver customer insights to inform creative.

The availability of data and metadata will increase even if identifiers are lost enabling improved decisioning and orchestration of B2B experiences.

Data and privacy will be inextricably linked as a driver and enabler of trust and transparency with improved performance. Data infrastructure investments provide a secure and scalable environment, the ability to provide a better organized, more secure, and scalable

environment connected to automated, analytically driven decisioning and orchestration platforms. The linkage of the data and the technology is still early in maturity, with process gaps more than technology gaps as a core problem to be overcome.

The organization transformation for B2B marketers is going to be continuous. Driven by the forces above, we expect that organizations will become more strategic, and roles more fluid, as tactical execution becomes more automated. Traditional expectations of a role-based career will expand to meet complexity of marketing, sales, and engagement. Career growth will require more cross-functional training with a more rotational experience model to support the flexible marketing organization. It is also expected that until such a time as B2B has caught up in digital experience, hiring will “borrow” from B2C brands or the B2C part of the organization, bringing more best practices and a “consumer engagement” mindset to B2B.

The downstream impact will be a marketing staff re-allocation, potentially re-balancing the relationship between marketers and the marketing supply chain. The ability to automate marketing will reduce the need for scaled staffing models

while at the same time increasing the need for higher value strategic support for planning, creating, buying, and measuring.

Budgets will continue to shift to digital, but not reach parity or dominance as it has with consumer marketing spend. With discovery and purchase moving through a more digital process, the use of digital media channels, primarily search and paid social will grow above market, helping to fill the top of the funnel and not just the mid and lower funnel tactics of performance marketing. B2B marketers should be looking at the balance between brand and performance spend, with creative, especially the use of video, adjusted to optimize filling the funnel and then nurturing through performance.

Ultimately the outlook for B2B is that of transformative growth in a hybrid world, with bumps along the way as people and processes change to match the availability of information and meet the ‘new buyer’. While our current forecast indicates steady increases in budgets for advertising and marketing spend, growing at a CAGR of 6.8% from \$49.9BB to reach \$70BB in the US through 2026, it is as much about the shift within the budgets as growth overall.



GLOSSARY

ACCOUNT BASED MARKETING (ABM)

Approach to marketing where a company focuses its efforts on targeting and engaging specific high-value accounts, tailoring marketing messages and tactics to meet their individual needs and preferences.

ARTIFICIAL INTELLIGENCE (AI)

The simulation of human intelligence processes by machines, especially computer systems. The ultimate objective of AI is to emulate human behavior through processing information (leveraging techniques such as ML, making ML a subset of AI) and acting upon this information.

CONVERSATIONAL AI

AI technology that enables computers or systems to engage in natural language conversations with users, often used in chatbots or virtual assistants.

GENERATIVE AI

AI technology that is capable of generating new content, such as images, text, or music, based on patterns and examples from existing data.

B2B MARKETING

Marketing activities and strategies that are focused on promoting products or services from one business to another.

B2C MARKETING

Marketing activities and strategies that are focused on promoting products or services from a business directly to consumers.

BRAND MARKETING

Marketing efforts that aim to build and promote a strong brand identity, including creating brand awareness, shaping brand perception, and fostering brand loyalty.

CLEAN ROOMS

Secure environments or systems where data can be analyzed or processed without violating privacy regulations, typically used for data sharing or collaborations while maintaining data privacy.

CREATIVE INTELLIGENCE

Data-driven technology solutions which provide ad creative performance across platforms, insights/suggestions to improve creative effectiveness and tools to determine which elements drive optimal results.

CUSTOMER DATA PLATFORM (CDP)

A unified database that collects and organizes customer data from various sources to create a comprehensive view of the customer, enabling more targeted and personalized marketing efforts.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Technology platform that focuses on managing interactions and relationships with customers, often involving the use of technology to track customer data, communications, and sales processes.

DECISIONING & ORCHESTRATION

The process of making data-driven decisions and coordinating various marketing activities across different channels and touchpoints to optimize customer experiences and achieve marketing goals.

EXPERIENTIAL MARKETING

Marketing strategies that emphasize creating memorable and immersive brand experiences for customers, often through interactive events, installations, or personalized engagements.

GDPR

General Data Protection Regulation, a legal framework that regulates the collection, storage, and processing of personal data of individuals within the European Union (EU) and European Economic Area (EEA), with the aim of protecting individuals' privacy rights.

MACHINE LEARNING (ML)

A subset of AI that focuses on developing algorithms and models that enable computers to learn and make predictions or decisions based on patterns and data, without explicit programming.

MARKETING AUTOMATION

The use of software and technology to automate repetitive marketing tasks and workflows, such as email campaigns, social media scheduling, lead nurturing, and customer segmentation.

MARKETING MIX MODELING (MMM)

An analytical approach that uses statistical techniques to evaluate and optimize the allocation of marketing resources across various channels and tactics, aiming to maximize the return on investment (ROI).

MEASUREMENT & ATTRIBUTION

The process of tracking and analyzing the effectiveness of marketing efforts and attributing results or conversions to specific marketing activities or touchpoints.

MULTI-TOUCH ATTRIBUTION

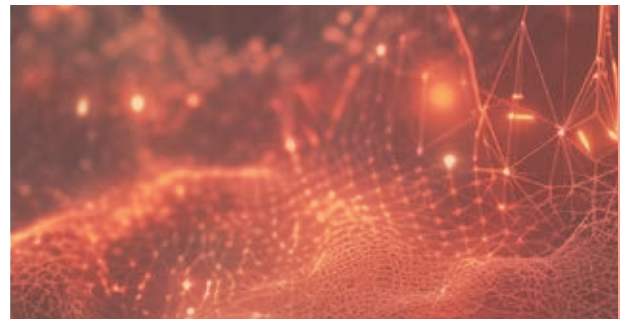
A method of assigning value or credit to multiple marketing touchpoints or interactions that contribute to a conversion or sale, taking into account the various stages of the customer journey.

OMNI-CHANNEL MARKETING

A marketing strategy that aims to provide a seamless and consistent brand experience across multiple channels and touchpoints, integrating online and offline interactions.

PERFORMANCE MARKETING

A results-oriented approach to marketing that focuses on driving specific actions or outcomes, often measured by key performance indicators (KPIs) such as sales, leads, or conversions.



ACKNOWLEDGMENTS

This report would not have been possible without the significant contributions of the industry leaders who supported our research and shared their opinions with us. In particular, Winterberry Group is grateful to our project sponsors for their time, efforts and insights:

PREMIER SPONSORS



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The ANA's (Association of National Advertisers) mission is to drive growth for marketing professionals, brands and businesses, the industry, and humanity. The ANA serves the marketing needs of 20,000 brands by leveraging the 12-point ANA Growth Agenda, which has been endorsed by the Global CMO Growth Council. The ANA's membership consists of U.S. and international companies, including client-side marketers, nonprofits, fundraisers, and marketing solutions providers (data science and technology companies, ad agencies, publishers, media companies, suppliers, and vendors). The ANA creates Marketing Growth Champions by serving, educating, and advocating for more than 50,000 industry members that collectively invest more than \$400 billion in marketing and advertising annually.

Learn more at ana.net.

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Anteriad puts B2B marketers in front of their next customer and ahead of their competition. Companies such as IBM, Microsoft, Forbes, SHRM, and Lenovo have benefited from our high-fidelity B2B buyer data, full and self-service multichannel execution, tele-based conversion services, analytics, and expert advisory to generate impactful ROI multiples. Our award-winning Anteriad Marketing Cloud platform tracks more than 500 billion buyer-related signals each month. BNZSA, our international division, delivers GDPR-compliant data and qualified prospects directly to sales teams with BDRs that offer local expertise in 26 languages.

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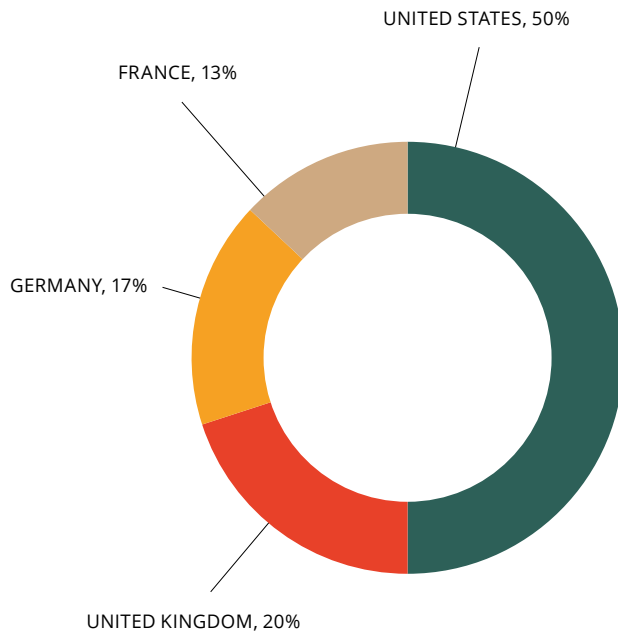
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METHODOLOGY

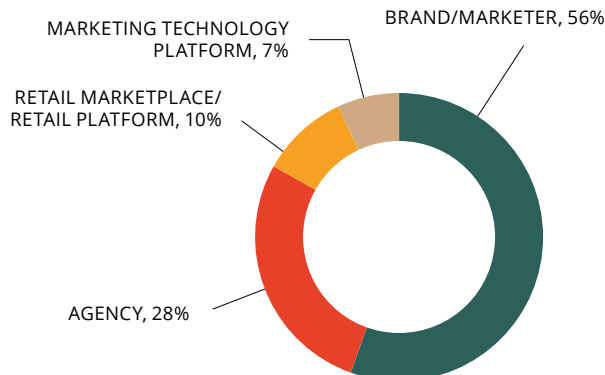
The insights in this report were validated by extensive industry research, including a survey conducted in March 2023 of 204 experienced marketers across the United States, France, Germany, and UK. We are indebted to the over two dozen individuals who provided their opinions in interviews conducted between February and March 2023.

SURVEY METHODOLOGY

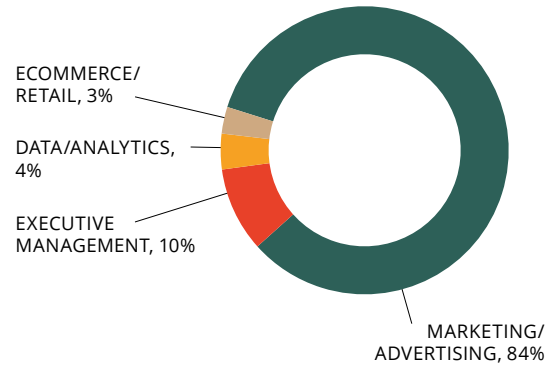
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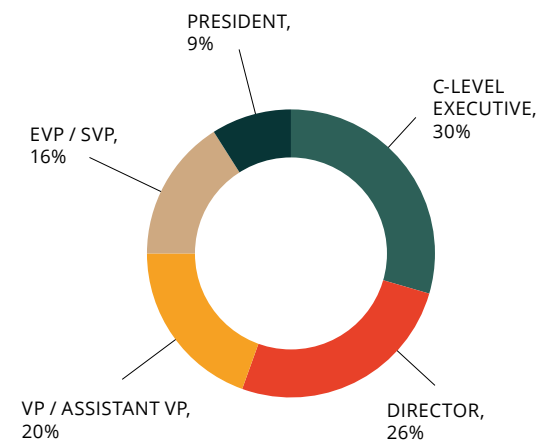
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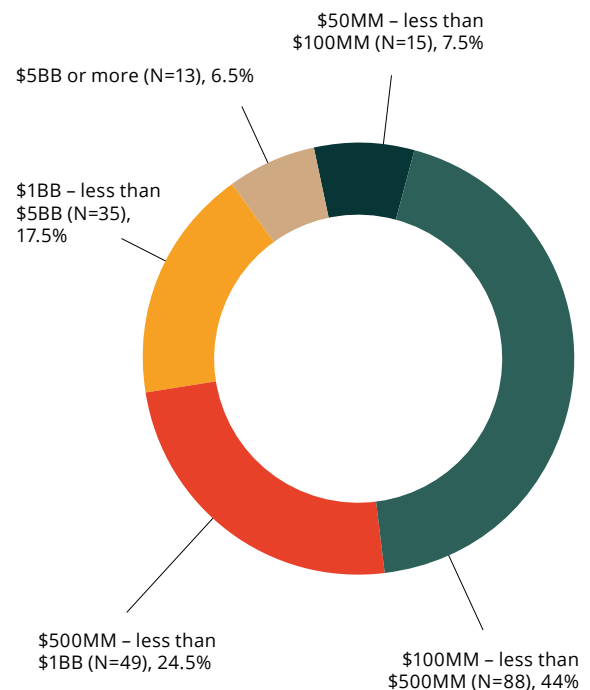
Department Type



Titles



Revenue



ABOUT WINTERBERRY GROUP

Winterberry Group is a strategic consultancy specializing in the intersecting disciplines of advertising, marketing, data, technology and commerce. We collaborate with stakeholders across the advertising and marketing ecosystem—service providers, technology developers, media companies, brands and investor groups—to identify and activate growth opportunities that drive the creation of real and lasting value.

We bring decades of experience and deep industry, operational and M&A expertise that bridges strategic development and tactical execution—driving unprecedented speed-to-action. And through our highly collaborative approach, we enable knowledge transfer and actionability, giving our clients a competitive edge and powering growth in performance, team engagement and shareholder value.

WINTERBERRY GROUP SERVICES

Growth Strategy

Corporate strategy that drives growth is at the heart of what we do. We work with clients to identify core competencies, evaluate strategic alternatives and build comprehensive, actionable growth plans.

Collaborative Activation

We guide brands and marketing practices through business process planning efforts aimed at helping them achieve lasting competitive advantage.

Mergers & Acquisitions

We leverage our industry knowledge to help financial investors make sound, value-driven investment decisions.

Market Intelligence

We maintain an active research and publishing practice that gives our consultants direct access to insights from senior industry executives and complements our client engagements.

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