



Fashion and Apparel  
**2024 Trends  
and Outlook**  
for North America



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Ready for  
**What's  
Next, Now<sup>®</sup>**

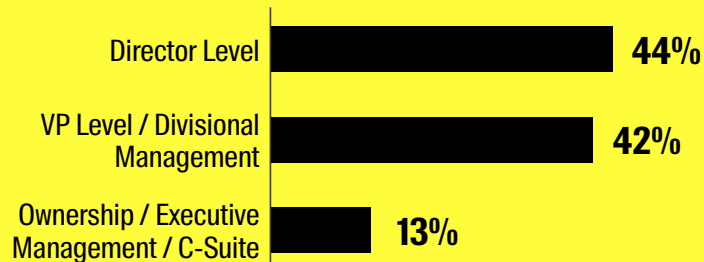


We surveyed  
**104**

**Total Respondents**

*82% Main Decision Makers, 18% Key Influencers*

**Job Role**



**Representatives from multiple sub-industries including:**



# Growth Is Always in Style in the Fashion and Apparel Industry

Fashion and apparel brands have focused on accelerating growth and improving agility during the 2020s. First, they strengthened fragile supply chains, then adopted new workforce strategies when labor and skills shortages took hold. Now, entrenched inflation has leaders concerned about containing operating costs and defending profit margins.

How will brands tackle these challenges to grow in 2024 and beyond? What role can technology play to strengthen resilience in the current operating environment? To better understand the state of the industry and market conditions, Aptean commissioned global research firm B2B International to survey more than 100 fashion and apparel businesses in the United States and Canada.

In this report, we present six trends revealed by our research and examine ways fashion and apparel brands can adapt strategically to maximize growth opportunities in 2024.

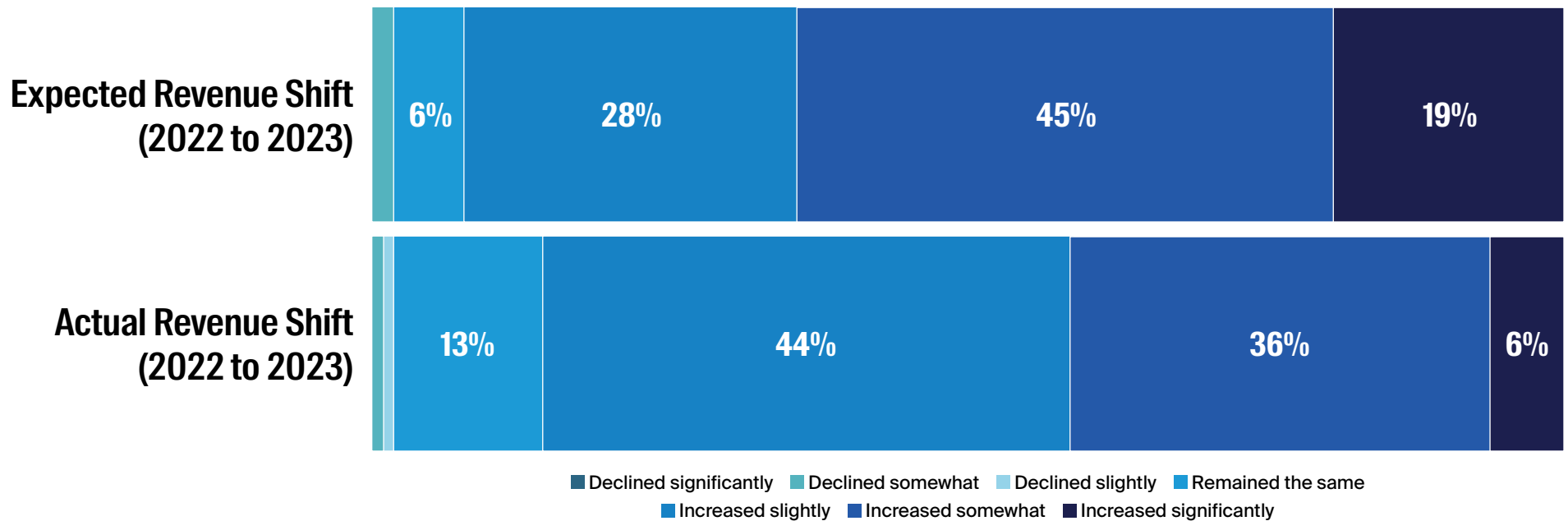
# Trend No. 1:

## Anticipating Growth, Brands Leverage Automation To Scale Efficiently

Fashion and apparel companies enjoyed solid gains in 2022, with an average 8.5% increase in revenue. Today, the industry remains upbeat about continued growth. **Nine out of 10 brands expect revenue growth in 2023**, with the average projection coming in at an 11.7% increase.



## Expected and Actual Revenue Performance



Despite strong financial results, companies face significant external pressures. Organizations identified higher operating costs as their most significant obstacle, driven by rising wages and inflation in material, utility, shipping and logistic costs.

# How Have Brands Responded to External Challenges?

Fashion and apparel businesses are finding ways to manage cost pressures and maintain profitability. Many implemented technology to increase efficiency by automating manual processes and streamlining operations.

Over the past year, organizations have worked hard to increase automation across various business areas. **Double-digit year-over-year (YOY) gains in the percentage of businesses that have automated key processes prove the industry’s automation advancements.** A considerable 60% of fashion and apparel manufacturers automated management of production processes using solutions like shop floor control (SFC) software—up from just 39% in 2022.

Automation is linked to revenue growth. For example, brands using PLM enjoyed 1.9% more YOY revenue growth in 2022 than those without PLM. Organizations using electronic data interchange (EDI) also experienced 1.9% higher revenue growth than brands not using EDI.

## How Brands Rank Their Top 3 External Pressures

|     |                                                           |
|-----|-----------------------------------------------------------|
| 71% | Higher operating costs                                    |
| 30% | Regulatory and legislative change                         |
| 67% | Changing consumer preferences<br>(43% for smaller brands) |

## Top 10 Technologies in Use at Fashion and Apparel Organizations

|     |                                        |
|-----|----------------------------------------|
| 70% | Customer Relationship Management (CRM) |
| 69% | Business Intelligence (BI)             |
| 67% | Shipping Software                      |
| 65% | Online payment platform                |
| 65% | Quality Management System (QMS)        |
| 62% | Enterprise Resource Planning (ERP)     |
| 60% | Supply Chain Management (SCM)          |
| 60% | Warehouse Management System (WMS)      |
| 55% | Product Lifecycle Management (PLM)     |
| 54% | Freight Management System (FMS)        |

## Industry Voices on Automation

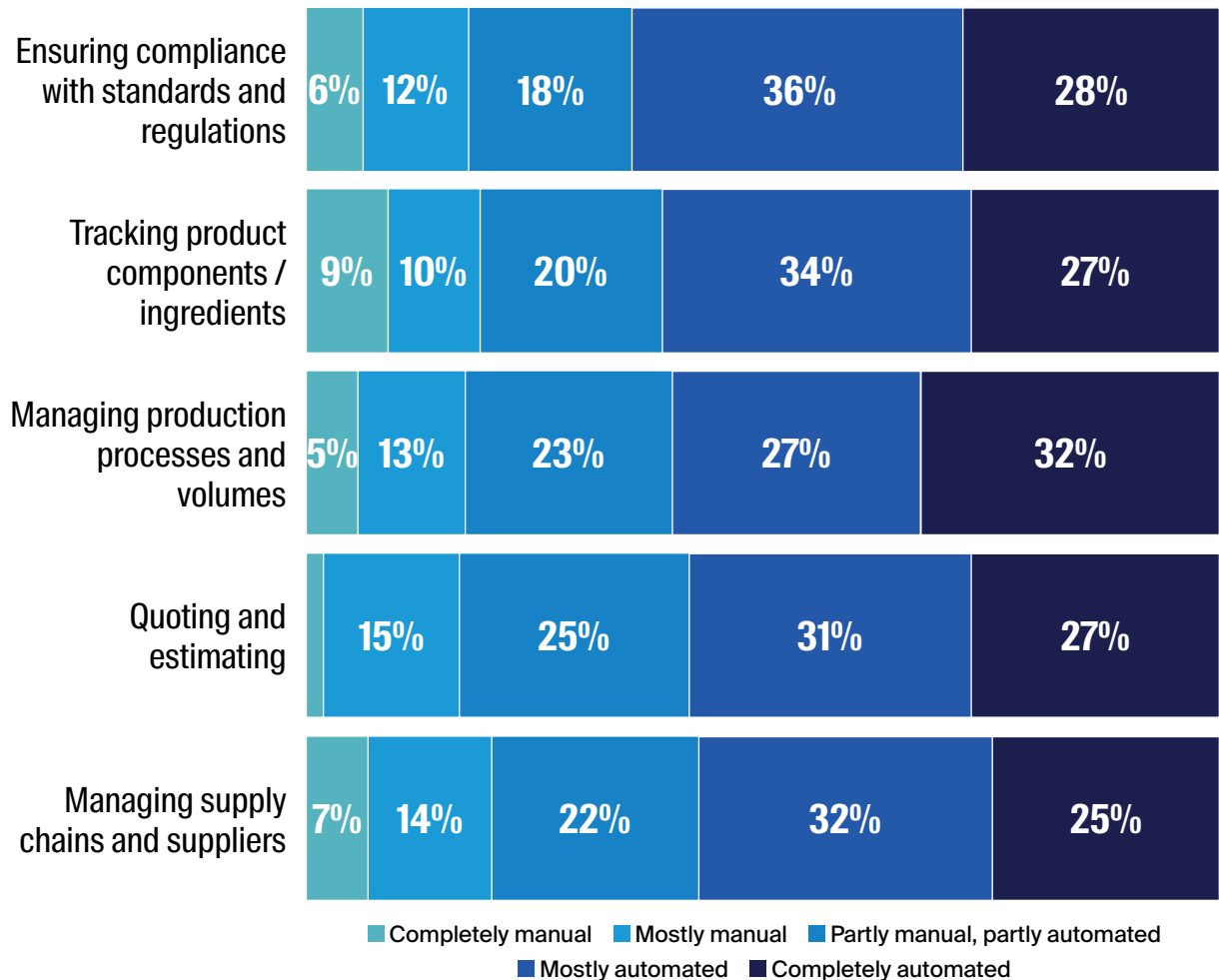
“We can **streamline our operations, minimize manual labor and boost efficiency using automation**. It also gives us the ability to make data-driven decisions and improve our overall performance.”

*Director at a clothing and accessories company in the U.S.*

“**Automation also improves the precision and dependability of our processes**. We can attain a better degree of accuracy in many operations by **decreasing manual involvement and human error**.”

*Supply chain executive at a footwear company in the U.S.*

## Business Areas Making Significant Advances in Automation



## What Does This Mean for Your 2024 Strategy?

Fashion and apparel brands that have not yet taken significant steps towards process automation risk falling behind their competitors. Moving forward, brands should build on successful efforts by expanding automation to areas of the business still relying on manual processes, such as PLM to automate fashion design and vendor management or SFC to optimize production. The goal is end-to-end automation that streamlines and transforms operations from initial product ideation to final order fulfillment.

## **Trend No. 2:** Mature in Digital Transformation, Brands Now Look Toward AI

Organizations advanced along their digital transformation journey in 2023. One in three brands have completed digital transformation projects and are now realizing the benefits. That's up 14% from 2022. Another 63% are well underway on digital transformation initiatives; only 4% of companies have yet to begin this critical process.



The fashion industry continues its rapid transition to the cloud. One-third of brands have moved to cloud ERP, and 41% are in the process, for a total of 74% of respondents adopting cloud ERP. Organizations that started or completed cloud migrations performed better financially in 2022 and expressed the highest profit and revenue growth expectations for 2023.

Brands measure the benefits of digital transformation in improved key performance indicators (KPIs). After noting significant gains in supply chain KPIs in 2022, organizations realized their biggest KPI improvements in procurement in 2023.

## Fashion and Apparel Organizations Attribute Improvements in KPIs to Digital Transformation

|                                                 | Overall - 2023 | 2022 | 2023 | % change |
|-------------------------------------------------|----------------|------|------|----------|
| Ecommerce / Direct-to-Consumer (DTC)            | 41%            | 32%  | 41%  | +9%      |
| Inventory / Warehousing                         | 35%            | 26%  | 35%  | +9%      |
| Sales / Customer Service On-Time In-Full (OTIF) | 39%            | 26%  | 39%  | +13%     |
| Analytics and Business Intelligence (BI)        | 37%            | 24%  | 37%  | +13%     |
| Procurement                                     | 40%            | 18%  | 40%  | +22%     |

# Where Are Brands Headed Next With Digital Transformation?

Brands are eager to invest in artificial intelligence (AI) to drive greater efficiency and generate better insights about customers, products and operations. **More than three-quarters of organizations are either investigating, implementing or using AI, with 38% using it now.** Larger brands are more likely to be early adopters. Organizations already using AI experienced the highest profit and revenue growth.

## Brands Already Using AI Experienced Greater Revenue Growth

| AI Strategy                   | 2023 | Actual revenue growth (2021-22) | Actual profit growth (2021-22) |
|-------------------------------|------|---------------------------------|--------------------------------|
| Already using AI              | 38%  | 9.9%                            | 10.5%                          |
| In process of implementing AI | 27%  | 7.6%                            | 7.4%                           |
| Investigating AI              | 12%  |                                 |                                |
| No plans to leverage AI       | 23%  |                                 |                                |

Industry Voices on AI

“Our company is presently implementing AI to analyze massive datasets and uncover trends that will help us make better business decisions. For example, we are **utilizing AI to forecast customer behavior.**”

*Operations director at U.S. clothing and accessories company*

“We can personalize our interactions with clients thanks to AI. **We’re using AI-powered chatbots and virtual assistants to deliver personalized support,** answer client questions and make recommendations.”

*Procurement / sourcing director at a U.S. clothing and accessories company*

“AI is critical in predictive maintenance because it **allows us to identify probable equipment problems or maintenance needs before they occur.**”

*Procurement / sourcing director at a mid-size U.S. clothing and accessories company*

Fashion and Apparel Brands’ Top 5 Plans for Using AI

|     |                                                          |
|-----|----------------------------------------------------------|
| 24% | Data analytics, decision-making and predictive analytics |
| 18% | Customer service                                         |
| 14% | Manufacturing                                            |
| 8%  | Automation                                               |
| 6%  | Supply chain management                                  |

What Does This Mean for Your 2024 Strategy?

AI will have many exciting applications in the fashion industry, including AI-powered demand forecasting, customer support, supply chain optimization, design generation, prototyping, textile innovation, robotic production automation and predictive maintenance. Generative AI will soon help designers create new styles much faster and with more sustainable materials. AI-powered chatbots already support customer shopping experiences.

Brands will use AI to accelerate growth with data-driven decisions based on intelligent insights and forecasts. But if your business lacks the digital systems for automated data collection or you have data silos caused by a lack of integration, AI’s potential will be limited. Fashion and apparel businesses should complete their digital transformation roadmaps, reviewing the technology stack for data gaps before moving to leverage AI.

Discover best practices in our [Trail Guide to Digital Transformation](#)



## Trend No. 3: Brands Remain Committed to Customer Satisfaction and Experience

Both near-term and long-term, the industry plans to maintain laser-focus on improving the customer experience. Not only did respondents choose **customer satisfaction as their top focus area for 2023**, but they also expected it to continue as their No. 1 objective through 2027.



## Top Areas of Focus for Fashion and Apparel Organizations

| Top 5 Focus Areas for 2023                                      |   | Top 5 Focus Areas for 2024-2027                                 |
|-----------------------------------------------------------------|---|-----------------------------------------------------------------|
| Improve customer satisfaction                                   | 1 | Improve customer satisfaction                                   |
| Improve employee retention                                      | 2 | Improve operational efficiency and integration                  |
| Increase visibility, accuracy and rapid access to business data | 3 | Increase visibility, accuracy and rapid access to business data |
| Improve supply chain resilience                                 | 4 | Improve employee retention                                      |
| Focus on innovation / R&D, product development                  | 5 | Attract the best people to build high-performing teams          |

**65% of fashion and apparel brands use an online payment platform, and brands that do experienced higher revenue growth in 2021-2022.**

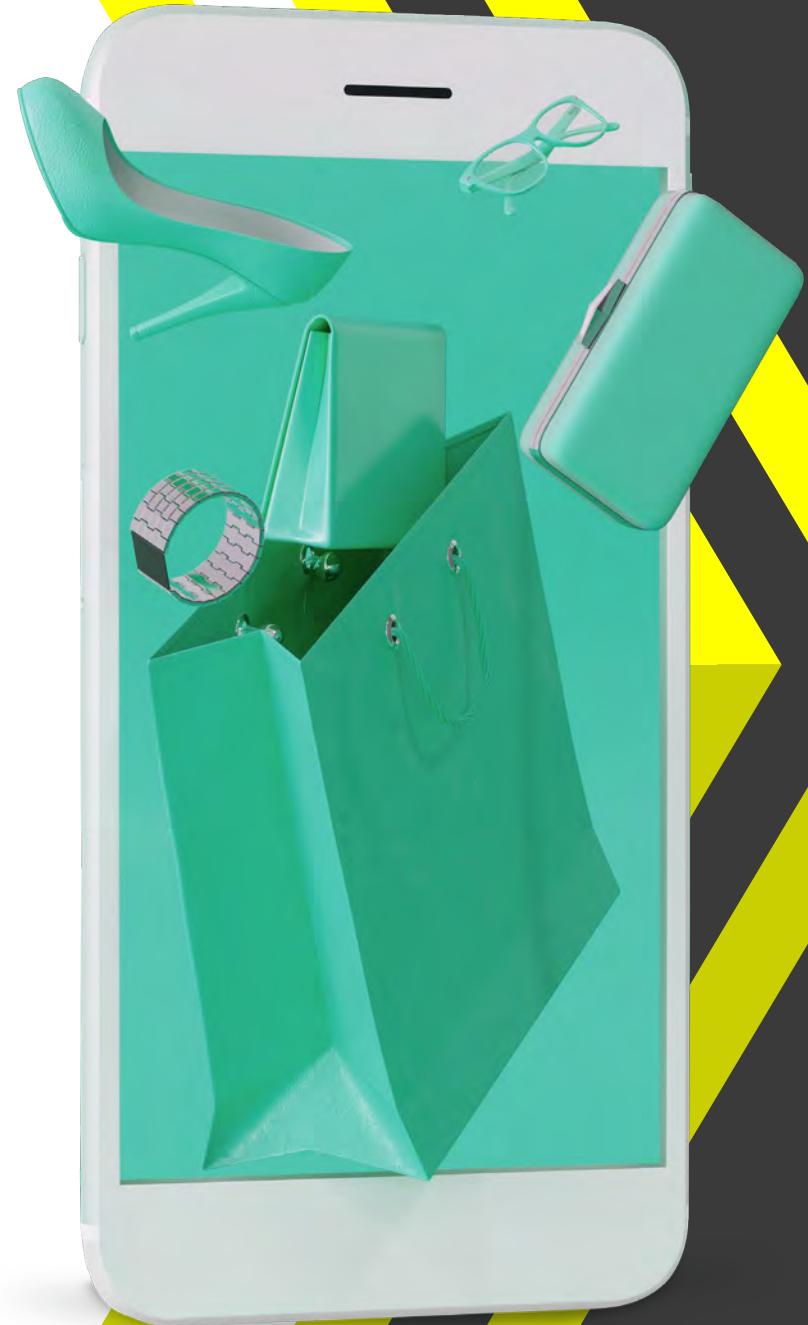
Brands are leveraging direct-to-consumer (DTC) sales through ecommerce and expanding their marketing mix to embrace channels such as Amazon and Shopify. Customer experience must be considered for every possible journey to a sale, including in stores, on web shopping platforms, on a mobile device or through an ecommerce website, as well as any combination of those. An omni-channel marketing approach is a necessity for fashion and apparel companies, but it is challenging, because omnichannel requires a consistent, easy customer experience with as little friction as possible, regardless of the channel(s) used by the customer.

## How Are Customer Experience and Technology Intertwined?

Fashion and apparel organizations need strong brands, good online presence and a deep understanding of their customers in order to enhance customer experience. Current technology investments demonstrate brands' commitment to the customer.

- › 70% of fashion and apparel brands now use CRM—up from 58% in 2022.
- › 69% have adopted BI, improving their capacity to track shifting patterns in consumer demand and preferences.
- › 55% use PLM to bring new designs and styles to market more quickly.

Using technology to personalize the experience beyond channel to the individual customer can create an additional competitive advantage. For example, **Neiman Marcus** learns what a customer's sizes are and then presents only styles available in those sizes on return visits. Buy online, pick up in store (BOPIS) is increasingly popular, and providing local inventory data to online shopping enhances value for 56% of consumers.



## Industry Voices on Customer-Facing Technology

“Through digital transformation, **we become more agile and responsive** to changing market dynamics. With real-time data and analytics, we can quickly adapt to customer demands.”

*VP of supply chain at a mid-size U.S. clothing and accessories company*

“By integrating digital channels and technologies, we are able to provide excellent customer experiences. **We can meet and exceed consumer expectations** through personalized interactions, seamless omnichannel experiences and self-service capabilities, promoting loyalty and satisfaction.”

*VP of supply chain at a mid-size clothing and accessories company in the U.S.*

## What Does This Mean for Your 2024 Strategy?

Building an engaging customer experience requires a deep understanding of your customers' purchasing motivations and preferences. Integrated solutions may help paint a fuller picture of your customers and enable data-driven decisions about customer experience. Unfortunately, 30% of fashion and apparel leaders said complex system integrations are a barrier to achieving future goals. Pursuing a single-vendor technology partnership may help solve this challenge.

Focusing on customer experience requires a commitment to better data analysis, experience design, personalization and omni-channel marketing tools. One-third of fashion executives cited cost and marketing mix challenges with DTC channels as one of the top themes impacting their businesses in 2023. Investing in ERP solutions that integrate with ecommerce and include omnichannel fulfillment capabilities can help brands sell directly to consumers.

Read More: **The Rise of DTC: How Your Consumer Goods Company Can Compete**



## Trend No. 4:

# Facing Staffing Issues, Organizations Pursue Outsourcing and Efficiency

For 43% of brands, the struggle to find and retain employees with the right skills to drive growth in the future is ongoing. In 2022 and 2023, fashion and apparel businesses reported **staffing and skills shortages as the most significant business challenge** encountered over the preceding 12 months.



# Actions Taken by Fashion and Apparel Businesses To Combat Staffing Issues

% Currently Doing/Implementing

|                                          | 2023 Results Breakdown |     |     | 2022 | 2023 |
|------------------------------------------|------------------------|-----|-----|------|------|
| Increase outsourcing                     | 74%                    | 19% | 6%  | 49%  | 74%  |
| Source / mobilize temporary labor        | 65%                    | 30% | 5%  | 53%  | 65%  |
| Use technology to prevent knowledge loss | 64%                    | 33% | 1%  | 55%  | 64%  |
| Create more hybrid / remote roles        | 64%                    | 35% | 1%  | 64%  | 64%  |
| Use less rigid job descriptions          | 63%                    | 30% | 8%  | 40%  | 63%  |
| Restructure or reduce working day / week | 54%                    | 40% | 6%  | 47%  | 54%  |
| Use technology to automate more tasks    | 53%                    | 45% | 3%  | 53%  | 53%  |
| Reskill / upskill existing employees     | 51%                    | 43% | 6%  | 40%  | 51%  |
| Change manufacturing locations           | 50%                    | 39% | 10% | 36%  | 50%  |

■ Currently doing / implementing
■ Not currently doing but planning to in the next 12 months
■ Not planning to do in the next 12 months

Brands are taking decisive action to solve labor challenges, with 74% implementing more outsourcing in 2023, up from 49% in 2022. Outsourcing and temporary labor sourcing (65%) were the top two actions taken to overcome worker shortages. Organizations that already outsourced had slightly higher revenue growth in 2021-2022. Restructuring the working day or week; reskilling and upskilling existing employees; creating more hybrid/remote roles; and changing manufacturing locations were also associated with better financial results.

**44% of fashion and apparel manufacturers identified the ability to improve productivity and efficiency, saving time on tasks, as the top value of automation.**

## What Role Can Technology Have in Overcoming Staffing and Skills Shortages?

Brands are using technology to get the best productivity out of the staff they already employ. While 64% of brands use technology to prevent knowledge loss during employee turnover, 53% have automated more tasks to improve productivity and efficiency. More organizations have plans to implement these strategies in the coming months.

Improving operational efficiency and integration jumped ahead by 12 places in fashion and apparel leaders' ranking of top long-term focus areas, securing the No. 2 spot for 2024-2027. Improving employee productivity has been the top perceived benefit of automation for two years running.

Integration is table stakes for obtaining the best return on your automation investment. Cloud platforms support easy integration through application programming interfaces (APIs). Consider adopting a suite of fashion-and-apparel-specific cloud ERP, PLM and SFC solutions from the same vendor for seamless built-in integration that takes full advantage of all functionalities.



## Industry Voices on Integration

“Integration streamlines and automates our internal operations, allowing us to operate more efficiently. We can **optimize workflows, decrease costs and make informed decisions** by digitizing manual operations, integrating systems and utilizing data driven insights ultimately delivering productivity improvements.”

*VP of operations at a mid-size U.S. clothing and accessories company*

“A collaborative and agile workforce is fostered by digital transformation. **We empower our workers to work more efficiently**; communicate across teams and regions; and build a culture of continuous learning and growth by integrating digital tools and platforms for communication.”

*VP of procurement / sourcing at a small clothing and accessories company in the U.S.*

## What Does This Mean for Your 2024 Strategy?

Technology can support and enhance several actions brands are undertaking to relieve staffing and skills shortages. First, as automation streamlines tasks, it frees employees' time, so they can have the opportunity to reskill/upskill and then refocus on new roles and tasks. Employees offered training and career advancement are more likely to be retained.

Second, moving critical business systems—including ERP, PLM and SFC—to the cloud can support the creation of more hybrid or remote roles. The cloud also facilitates hiring in different global locations while still working as a team with access to shared, real-time data.

Finally, a vendor management portal can make it easier for your staff to work efficiently and effectively with outsourced contract manufacturers. It centralizes and streamlines communications with vendors about tech packs, costs, POs, production and shipments.

Read the eBook: **Are You Getting the Best from Your Workforce?**



## Trend No. 5:

# Brands Deploy a Wider Range of Tactics To Overcome Supply Chain Disruptions

In the fashion industry, 2022 was the year of the supply chain. Major disruptions exposed the fragility of many manufacturers' supply chains. Organizations launched initiatives to strengthen their supply chains and increase resiliency. In 2023, organizations again reported **supply chain frustrations, naming it their second-largest challenge over the past 12 months** after labor shortages.

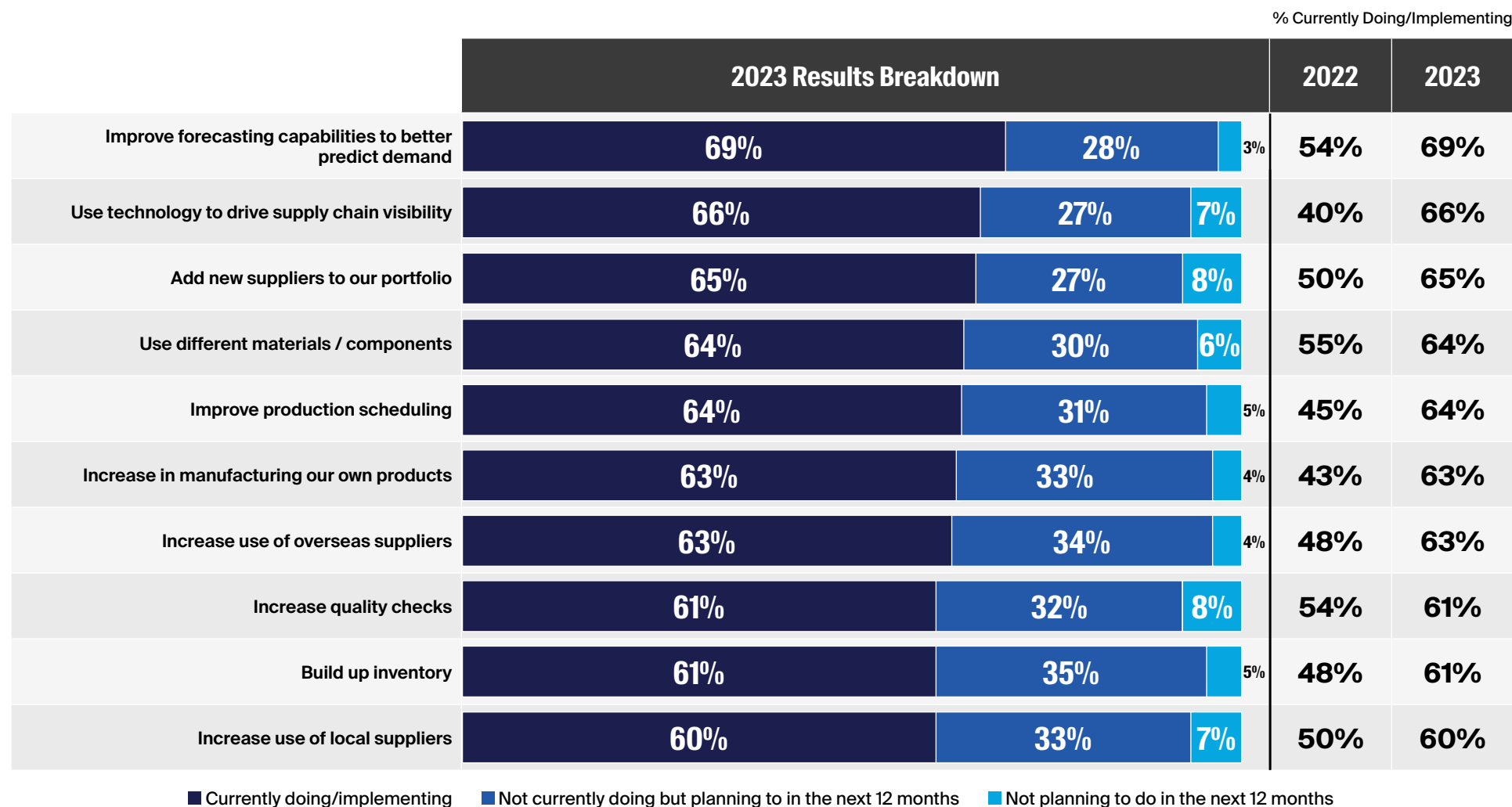


# How Have Brands Responded to Supply Chain Challenges?

Brands implemented a wide range of actions to tackle supply chain disruptions in 2023, including improving visibility, forecasting and production scheduling capabilities with technology. They widened local and overseas supplier portfolios and spread orders across more suppliers.

In addition to adding more suppliers, brands are strengthening relationships in the supply chain. More than 60% of fashion leaders are considering strategic partnerships with suppliers to increase speed to market and create more efficient supply chains, according to **McKinsey & Company**.

## Actions Taken by Fashion and Apparel Businesses To Overcome Supply Chain Disruptions



| Supply Chain Tactic Implemented                                          | Actual Revenue Growth 2021-2022 |           |
|--------------------------------------------------------------------------|---------------------------------|-----------|
|                                                                          | Implemented                     | Not Using |
| Increase use of overseas suppliers                                       | 9.5%                            | 6.9%      |
| Increase use of local suppliers                                          | 9.4%                            | 7.2%      |
| Streamline the supplier onboarding process                               | 9.4%                            | 7.4%      |
| Build up inventory                                                       | 9.2%                            | 7.4%      |
| Create / improve supply chain contingency plan                           | 9.1%                            | 7.6%      |
| Improve production scheduling to make smarter use of available inventory | 9.1%                            | 6.9%      |
| Spread orders across a wider number of suppliers                         | 9.1%                            | 7.7%      |
| Use different materials / components                                     | 8.9%                            | 7.9%      |
| Improve traceability                                                     | 8.5%                            | 8.2%      |





On average, **brands implemented nine supply chain tactics in 2023**—up from seven in 2022. Organizations taking action to improve supply chain management **enjoyed higher revenue growth** than those who did not.

## What Does This Mean for Your 2024 Strategy?

Brands have invested a lot in supply chain improvements, but now is not the time to slow down. As operating costs continue to rise and climate and geopolitical disruptions increase, having a robust portfolio of suppliers can help protect production schedules and profit margins.

Continue to evaluate the success of supply chain efforts and identify where your organization can make further improvements. Leading brands leverage ERP and PLM solutions with solid supply chain capabilities, including demand forecasting, procurement and materials management.

Read more: **How Fashion Software Helps You Tame Supply Chain Complexity**



## Trend No. 6:

# Industry Leaders Undertake Sustainability for Brand Image and Growth

The fashion and apparel world faces increasing environmental, social and corporate governance (ESG) mandates as governments around the world strive to meet their 2050 Net Zero commitments. Unfortunately, the industry has always had an oversized waste and pollution footprint.

But mandates aren't the main reason brands are pursuing sustainability. **For industry leaders, sustainability is foremost about protecting and enhancing the brand.** One-third of executive leaders said sustainability is a differentiating factor for their brands and part of the corporate image.





## Top Benefits of Sustainability for Fashion

- |   |                                                                                                           |
|---|-----------------------------------------------------------------------------------------------------------|
| 1 | <b>Brand image:</b> Not only customers, but also employees, demand sustainability.                        |
| 2 | <b>Efficiency improvements:</b> Sustainability reduces waste and cuts energy costs.                       |
| 3 | <b>Lower risk:</b> Sustainable supply chains reduce business and operational risk.                        |
| 4 | <b>Health and safety:</b> Sustainability reduces the exposure of communities and employees to pollutants. |
| 5 | <b>Competitive advantage:</b> Sustainability appeals to a younger customer base and enter new markets.    |

Sustainability could connect brands to younger generations of environmentally- and climate-conscious customers. **About one-quarter** of consumers make purchase decisions driven by sustainability, especially females under 35. Those consumers were more likely to renew their wardrobes every season. Representing 40% of global consumers, nearly 79% of Gen Z say sustainable fashion is important, and 85% research every purchase online.

Nearly **nine in 10 fashion and apparel organizations** are making a **significant effort toward being environmentally sustainable.**

## What Are Sustainability Leaders Doing?

Over one-third of brands see themselves as leaders in sustainability. In our survey, the No. 1 action taken to become more sustainable was innovation in the approach to distribution. Fashion and apparel businesses were also evaluating supply chains for sustainability opportunities.

From experimenting with new fabrics, materials and dyes to embracing less wasteful manufacturing processes, brands are finding innovative ways to create more sustainable products. They are also using recycling and upcycling to make meaningful impacts on fashion waste.

While sustainability is important to consumers, it is not always well-researched or understood by them. Fashion and apparel companies would do well to increase the visibility and transparency of sustainability programs to educate consumers and enhance brand loyalty.



## Spotlight on Sustainability

Leading workwear brand **Carhartt** developed a **resale program called Reworked** to encourage sustainability and brand loyalty. Customers can exchange certain Carhartt styles less than 10 years old for a gift card at Carhartt stores. **Reworked** recycles or donates the trade-in clothing, keeping fabric out of landfills. Customers are incentivized to shop again by their gift cards. This year, the brand plans to expand by accepting mail-in trades in partnership with Trove.

Read **Carhartt's success story** with Aptean Apparel Shop Floor Control.

## What Does This Mean for Your 2024 Strategy?

Embracing ESG values is ethically responsible and has the potential to drive growth by connecting brands with younger values-based shoppers. Businesses need to design sustainability objectives that drive growth, protect profitability and meet compliance requirements. Here's how fashion and apparel technology solutions can help brands mind the bottom line while lowering environmental impact:

- › PLM helps designers create styles that use sustainable fabrics and other materials and patterns that reduce cutting waste.
- › ERP improves forecasting so brands make what customers want in the right quantities to avoid waste. Omnichannel fulfillment can reach new consumers and enable brands to develop off-price channels to sell excess inventory.
- › SFC improves product quality, reducing waste and lowering the emissions generated by returns.

Learn more: **Looks Good on You: Apparel ERP and Sustainable Fashion**



# Can Your Current Technology Stack Drive Growth and Adapt to Change?

The findings from Aptean's research clearly show digital transformation drives efficiency gains and empowers growth for fashion and apparel organizations.

To thrive in a dynamic industry, brands need to stay adaptable and flexible to stay in front of shifting consumer preferences, supply chain disturbances, changing labor/skills trends and ESG mandates. Digital transformation paves the way for brands to become more resilient, anticipate changes and adopt better strategies.

In 2024 and beyond, the challenge for fashion and apparel manufacturing leaders will be identifying the best industry-specific solutions to optimize their technology stack for growth. Partnering with a proven vendor of industry-specific, cloud-based solutions can help brands achieve superior visibility and insight to achieve their objectives.

## Aptean Specializes in Digital Solutions for the Fashion and Apparel Industry

We've developed a suite of easy-to-use, cloud-based fashion and apparel software designed to give brands the ability to anticipate market trends, adapt to changing customer preferences and leverage digital transformation for financial success and operational efficiency.



## Proven Track Record in Fashion and Apparel Software

As a single-provider partner, Aptean delivers fashion-specific solutions to drive digital transformation and measurable performance improvements. Just ask our customers:



[Read Full Story >>](#)



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“Now everything is in PLM. We are hiring more and more tech designers who are able to use **Aptean Apparel PLM** and create tech packs, so we don’t have to have on-hand pattern-makers. And anyone can search through the brands, the season, the category. That’s a big help in searching what we’ve done in previous seasons. Aptean Apparel PLM definitely has **eliminated a lot of paper and given us a tool to reference.**”

**Lorenzo Martin**, SVP Sourcing Production and Product Development, ADPL

“The biggest benefit of working with the Aptean apparel team is their **willingness to truly understand our operation** and be a **thought partner on opportunities for improvement.**”

**Robert Fagan**, CFO, Johnny Was

“**Aptean Apparel Shop Floor Control is amazing!** The interface is so clean and clear that it is easy to implement and adopt. Even the less savvy tech operators have embraced SFC easily and enjoy using it, which has translated into higher job satisfaction and increased productivity, so much so that Grand Forest achieved a **10% increase in productivity** in the first month alone.”

**Carrie Bovender**, CEO, Grand Forest, Inc.



# Are You Ready to Learn More?

Find out how Aptean apparel solutions can help your organization gain efficiency and visibility to make data-driven improvements to your supply chain, workforce and production processes.

Contact us at [info@aptean.com](mailto:info@aptean.com) or visit [www.aptean.com/apparel](http://www.aptean.com/apparel).



Aptean is one of the world's leading providers of purpose-built, industry-specific software that helps manufacturers and distributors effectively run and grow their businesses. With both cloud and on-premise deployment options, Aptean's products, services and unmatched expertise help businesses of all sizes to be Ready for What's Next, Now®. Aptean is headquartered in Alpharetta, Georgia and has offices in North America, Europe and Asia-Pacific.

To learn more about Aptean and the markets we serve, visit [www.aptean.com](http://www.aptean.com).

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## About the Research

The insights in this report are from original industry research conducted by Aptean and B2B International in July 2023. B2B International is a global, full-service market research firm, specializing in researching B2B markets.