2022 Global Marketing Trends

Global C-Suite and Denmark Consumers
2022 GLOBAL MARKETING TRENDS

AGENDA

01 Introduction: Thriving through customer centricity
02 Purpose—A beacon for growth
03 Authentically inclusive marketing
04 Building the intelligent creative engine
04 Meeting customers in a cookieless world
05 Designing a human-first data experience
06 Elevating the hybrid experience
08 Supercharging customer service with AI
Thriving through customer centricity

Executives are balancing productivity with increasing engagement with customers, employees, and society
Marketers are constantly evolving with the world around them. If last year was about responding to an unprecedented shock, this year is about recovering, and for those best positioned, thriving in this customer-centric world.

Our survey of 1,099 global executives revealed that many are prioritizing productivity, digital acceleration, customer engagement, and employee wellbeing as top outcomes to achieve over the next 12 months.

Combined with the insights from 500 Danish consumers, we see seven trends rising to the surface that can help marketers refine their approach to meeting the needs of people inside and outside of the organization, better navigate their data and technological environments, and deliver more holistic experiences for the humans they serve.
Executive Summary

High-growth brands are ahead of their lower-growth peers in several ways, including activating purpose more holistically, measuring diversity, equity and inclusion (DEI) efforts across the organization, and deploying more sophisticated first-party data strategies.

**Purpose—A beacon for growth** Consumers still prioritize price and quality when making purchase decisions. However, a deeper look shows purpose-driven purchasing criteria still exist—it’s just a more nuanced discussion. To cut through the noise and resonate with these customers can take a holistic commitment to purpose—and high-growth brands are doing just that.

**Authentically inclusive marketing** Younger and more diverse demographics notice diverse advertising. But it takes more than diverse advertising to win over customers. It can require a true commitment to DEI—and high-growth brands lead the way.

**Building the intelligent creative engine** A majority of the college-educated workforce shifted to remote work during the pandemic. Marketers can integrate this new talent pool to fill skill gaps, bring in more diverse thoughts, and get geographically closer to their business partners.

**Meeting the customer in a cookieless world** High-growth companies are not only getting ahead of their lower growth peers in shifting to a first-party data strategy, but they are also deploying more sophisticated use cases, including dynamic creative optimization and programmatic media.

**Designing a human-first data experience** The most well-received—and trusted—customer data experiences typically start with strong brand relationships. They also rarely include some form of in-depth tracking, such as third-party cookies and geo tracking.

**Elevating the hybrid experience** A majority of executives plan to invest more in hybrid experiences over the next year to increase their ability to offer personalization, greater innovation, and help people connect.

**Supercharging customer service with AI** When customers weigh purchase options, timely offers and knowledgeable customer service are the most helpful nudges. Brands can combine artificial intelligence (AI) and customer service to deliver a true end-to-end experience.
We surveyed 1,099 global executives and 500 Danish consumers to better understand how top brands are meeting the needs of today’s customers.
The 1,099 executive respondents

**ROLE**
- CEO: 7%
- CFO: 8%
- CIO: 8%
- CMO: 7%
- CHRO: 12%
- COO: 8%
- CLO: 51%

**INDUSTRY**
- Consumer: 21%
- ER&I: 6%
- FSI: 13%
- LS&HC: 28%
- GPS: 17%
- TMT: 28%

**COUNTRY**
- US: 62%
- UK: 9%
- France: 9%
- Japan: 11%
- Netherlands: 9%

**BUSINESS TYPE**
- B2B: 31%
- B2C: 33%
- Mix of both B2B and B2C: 36%

**ANNUAL REVENUE**
- $250M - $1B: 23%
- $1B - $5B: 27%
- $5B - $25B: 44%
- > $25B: 6%

**ANNUAL GROWTH RATE**
- Negative growth: 11%
- 1% - 10% growth: 53%
- > 10% growth: 36%

*GPS responses excluded
INTRODUCTION

DEMOGRAPHICS: CONSUMER INSIGHTS

500 consumer respondents

GENDER

- Male: 47%
- Female: 52%

EDUCATION LEVEL

- Some High School: 5%
- High School: 26%
- Undergraduate Degree: 29%
- Graduate Degree: 26%
- Post-graduate Degree: 3%

AGE GROUP

- 18 - 25: 19%
- 26 - 45: 34%
- 46+: 48%
Top outcomes executives hope to achieve over the next year

Executives are focused on productivity and customer engagement

**TOP THREE OUTCOMES EXECUTIVES HOPE TO ACHIEVE**

- **Improve productivity and efficiency** 39%
- **Improve engagement with your customers** 33%
- **Accelerate your move to digital platforms/technologies** 29%
- **Increase organizations impact on society** 28%
- **Reduce internal/operating costs** 26%
- **Improve risk management** 25%
- **Create differentiation with your competition** 23%
- **Drive greater revenue** 22%
- **Change your business model** 18%
- **Retain top talent** 16%
- **Disrupt your industry** 11%

---

Executive survey, Q11: In the next 12 months, what are the Top 3 greatest outcomes you hope to achieve? N = 1,099
Purpose—A beacon for growth

How brands can gain competitive advantage through an authentic purpose
Price & quality are still top of mind considerations

PRICE AND QUALITY ARE TOP BUYING CONSIDERATIONS

Potential reasons
- Price
- Quality
- Delivery speed
- Ability to customize
- Environmentally sustainable materials / methods used
- Seller provides a safe purchase experience
- Brand commits to addressing social inequities
- Brand supports the community
- High standards for protecting personal data

Consumer survey, Q15: This question seeks to better understand why you chose your particular [item selected]. Please rank the top three most important reasons for choosing your [item selected]. N = 500
When we look deeper, we see other
important purchase considerations for consumers beyond price and quality—but it’s more nuanced to demographics and categories.
Where issues beyond price and quality rise to the forefront

25% 29% 42%

25 years-old and younger see sustainability as a top purchasing criteria in Beauty & Personal Care

view providing a safe experience as a top purchasing criteria in Travel

are more loyal to brands that commit to addressing social inequities*

Consumer survey, Q15: Please rank the top 3 most important reason for choosing your [product/experience]. \( N = 500 \)

*Consumer survey: I am more willing to shop at brands that commit to addressing social inequities. \( N = 500 \)
How do brands make their purpose stand out and fuel growth?

An integrated purpose may be especially necessary in a world where many consumers still emphasize price and quality when making purchasing decisions.
High-growth brands emphasize purpose across the enterprise

While product and service delivery is still the most common, high-growth brands are putting an emphasis on employees and society.

---

Executive survey, Q11: In your opinion, which of the following statements reflect what company purpose means to your organization? The organization's purpose:  

- Inspires how the organization delivers products and services: 71% (65%) 66%
- Drives the corporate social responsibility investment strategy: 58% (54%) 58%
- Articulates a set of values to guide employee decision making: 51% (58%) 36%
- Is fundamental to brand messaging: 42% (36%) 36%

The largest delta between negative and high growth:

---

PURPOSE—A BEACON FOR GROWTH
High-growth brands measure purpose initiatives more often

High-growth brands integrate purpose into the employee review process at a significantly higher rate than their lower-growth peers

HOW ORGANIZATIONS ARE MEASURING PURPOSE

- Aligning corporate social responsibility investments to purpose: 37%
- Integrating purpose into the employee review process: 38%
- Establishing purpose criteria for engaging in business partnerships: 40%
- Evaluating customer feedback scores: 41%
- Developing brand messaging and advertisement measurements: 42%
- Incorporating diversity, equity and inclusion metrics into purpose measurement: 44%
- Developing product portfolio measurements (e.g., ensuring product offerings align to purpose): 47%

Executive survey: Q16. How is your organization measuring its purpose related activities? N = 912 (No GPS and only organizations that measure purpose.)
Purpose—A beacon for growth

How brands can gain competitive advantage through an authentic purpose

**Purpose requires enterprisewide alignment** Purpose can’t be done in isolation, and—as we’ve seen with high-growth brands—it takes a holistic approach.

**Purpose takes accountability** The highest-growth brands more often measure their purpose, from product delivery to the employee review process. Establishing KPIs can help ensure the brand continuously keeps its purpose front and center. These KPIs can also help prevent brands from leaning into areas for which they are not ready.

**Purpose is about the relationship with the customer** A clearly defined purpose can resonate with customers—and CMOs can bring that unique viewpoint to the organization.

To learn more about these recommendations, read the full *Purpose—A beacon for growth* chapter here.
Authentically inclusive marketing

Winning future customers with diversity, equity, and inclusion
Consumers—especially younger generations—are noticing diverse advertisements and shopping more with brands that make a commitment to addressing social inequalities.
Younger generations are more likely to notice inclusive ads

YOUNGER GENERATIONS MORE OFTEN NOTICE INCLUSIVE ADVERTISING AT TIME OF PURCHASE CONSIDERATION

Consumer survey, Q18: At the time of making your [product/experience] purchasing decision, were you aware of the brand prominently promoting diversity in advertisements (e.g., ethnically/racially diverse imagery, highlighting individuals with different abilities). N = 500

---

Copyright © 2021 Deloitte Development LLC. All Rights Reserved.
When we asked people, in general, are they more willing to shop at brands that commit to addressing social inequities, 42% agreed or strongly agreed.
It’s not just about advertising, it’s about committing to create change and equitable outcomes.

And the highest growing brands are measuring their DEI efforts more holistically.
High-growth brands measure DEI progress more often

High-growth brands especially put a premium on measuring hiring and talent retention objectives, community investments, and brand messaging & imagery

### HOW ORGANIZATIONS ARE MEASURING DEI EFFORTS

<table>
<thead>
<tr>
<th>Objective</th>
<th>Negative growth</th>
<th>1% - 10% growth</th>
<th>+10% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring objectives</td>
<td>15%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Talent retention objectives</td>
<td>17%</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Brand messaging &amp; imagery</td>
<td>20%</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Community investments</td>
<td>27%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Mentorship programs</td>
<td>29%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Inclusive leadership behaviors</td>
<td>27%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Training programs</td>
<td>20%</td>
<td>25%</td>
<td>27%</td>
</tr>
<tr>
<td>Diversity of customer base</td>
<td>36%</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Business partnership expectations</td>
<td>31%</td>
<td>34%</td>
<td>37%</td>
</tr>
<tr>
<td>Data capture objectives</td>
<td>31%</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>New product/service objectives</td>
<td>35%</td>
<td>40%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Shading indicates statistically significant differences between high and low-growth

Executive survey, Q30: Has your organization established key performance metrics for any of the following DEI objectives? N = 1,039 (no GPS)
Authentically inclusive marketing

Winning future customers with diversity, equity, and inclusion

It’s more than diverse imagery Customers may take note of diverse advertising, but they are also keenly aware when businesses fall short of the values they espouse. Instead, it takes a holistic approach—both in front of and behind the camera—to help ensure the messages brands create are congruent with the values they live by.

Align metrics to advertising It’s not just about featuring diverse voices and imagery, but also considering how individuals are represented within those messages. Brands can better hold themselves accountable by implementing metrics and conducting regular “content audits” to help ensure authentic brand messaging.

To learn more about these recommendations, read the full Authentically inclusive marketing chapter here.
Building the intelligent creative engine

How unconventional talent strategies can bring marketing closer to the customer
With 63% of people switching to remote work, new talent pools emerge for companies that were once confined by geographic limitations.

But remote work will put even more emphasis on collaboration.
Analytical expertise is outpacing creative skills for marketers

Marketing was once considered a field for creatives, but many marketing leaders are now prioritizing more analytical skill sets

CMOS who identified analytical and creative expertise as top skills

Executive survey, Q27: Thinking about your highest performing direct report, select the top two skills that you believe accounts for their strong performance. N = 1,099
Collaboration is a top skill to executives

While strong collaboration skills ranked as the number one skill across the C-suite, **CMOs were least likely to identify it as a top skill**.
Building the intelligent creative engine

How unconventional talent strategies can bring marketing closer to the customer

Stand up more agile talent models By starting with a clear objective, marketers can create pods of various skill sets, such as data scientists, programmers, graphic designers, and creatives, to work on strategic objectives together—rather than through a linear production process.

Rethink traditional forms of talent Social influencers are the latest form of talent that can be redeployed as creative agents rather than simply product spokespeople. Not only can this get the brand closer to the customer, but it can engage with the market in more novel ways.

Put a premium on collaboration While most of the c-suite identified collaboration as a top skill set, CMOs were least likely to do so. But with a growing remote workforce, collaboration should be a priority in helping ensure these new voices and skills are fully embedded within the organization.

To learn more about these recommendations, read the full Building the intelligent creative engine chapter here.
Meeting customers in a cookieless world

How growth leaders are rethinking customer marketing and data strategy in a rapidly changing digital world
Shifting to a first-party data strategy

PERCENT SHIFTING TO A FIRST PARTY DATA STRATEGY

- 40% Negative growth (n = 115)
- 52% 1% - 10% growth (n = 546)
- 61% +10% growth (n = 375)

High-growth companies are shifting to a first-party data strategy

Executive survey, Q16: As use of third-party cookies decreases, does your organization plan to shift its data strategy to rely more on first-party data. N = 1,036 (no GPS)
First-party data use cases

CMOs from high-growth brands significantly lead the way in more sophisticated use cases, such as dynamic creative optimization and programmatic media.

Executive survey, Q19: How is your organization using first-party data for each of the following activities? *N = 511 (CMOs only, no GPS)*
Meeting customers in a cookieless world

How growth leaders are rethinking customer marketing and data strategy in a rapidly changing digital world

**Cultivate unique first-party data** Marketers who focus on developing first-party data for their brands can create more opportunities to reach those customers by cultivating unique data insights and long-term measurement. One way to do this is by offering value in exchange for data.

**Build deeper relationships with ecosystem partners** First-party data requires organizations to build infrastructure and take more of that information control in-house. But to grow the first-party data, marketers may need to look outside their walls. Marketers should look to strengthen those relationships with partners, such as tech giants and media publishers, to gain access to their walled gardens and corresponding data insights.

**Rethink your analytics** Without third-party cookies, prospecting and retargeting will most likely become less individualized. However, to establish, maintain, and deepen customer relationships, companies should reimagine how they use analytics and targeting. This may mean shifting the focus from individuals to cohorts, which gives marketers a way to target ads to groups without requiring details of individual users.

To learn more about these recommendations, read the full Meeting customers in a cookieless world chapter here.
Designing a human-first data experience

Interacting with customers—and their data—to foster trust
We presented 10 scenarios where a brand or organization deploys personal data. We asked consumers to indicate how “helpful” or “creepy” they find each scenario.
Three types of data usage scenarios

We categorized scenarios as “in-depth” if the brand tracked the user’s behavior through geo-tracking, third-party cookies, or perceived device listening.

In-depth data only
After talking to a friend about how much you want to get a cup of coffee, an advertisement for coffee shows up on your social media feed moments later.

In-depth & relationship data
You enter your favorite store and moments later receive an in-store coupon as you are browsing the aisles.

Relationship data only
You regularly shop on a brand’s app and receive recommendations/alerts when items go on sale.
We then created a net “helpful” score by subtracting the “creepy” from “helpful” responses.

And the highest scored scenarios lead with strong brand relationships—and almost never involved in-depth tracking.
Net helpful score

Net Helpful Scores (NHS) are calculated by subtracting the percentage that indicated the scenario is creepy from those that indicated it is helpful (neutral and unsure responses were removed).
Designing a human-first data experience

*Interacting with customers—and their data—to foster trust*

**Build strong relationships first** You can’t lead with deeper tracking methods before the consumer trusts you. Instead, establish a strong customer relationship before utilizing in-depth forms of tracking.

**Coordinate with security teams upfront** Marketers can no longer interact digitally without consequence, so they should embed cyber security as soon as possible in planning successful programs.

**Transmit honest communications and motives** Implement accurate and honest marketing and communications—especially around security policies. A good rule of engagement: In clear, easy-to-understand language, articulate why specific personal information is needed, how it is used, and always give the customer the option to opt out.

To learn more about these recommendations, read the full *Designing a humane customer-data experience* chapter here.
Elevating the hybrid experience

Where human-centered design creates greater choice in physical and digital environments
Executives are looking to hybrid to create more personalization, innovate more, and help people connect.

Simultaneously, more consumers—especially younger ones—are using emerging channels to interact and purchase from brands.
## REASONS FOR INVESTING IN HYBRID EXPERIENCES

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater personalization of products/services</td>
<td>43%</td>
</tr>
<tr>
<td>Opportunity for innovative offerings</td>
<td>43%</td>
</tr>
<tr>
<td>Help people feel more connected</td>
<td>40%</td>
</tr>
<tr>
<td>Offer more inclusive experiences</td>
<td>38%</td>
</tr>
<tr>
<td>Digital offerings alone couldn’t provide a holistic experience</td>
<td>37%</td>
</tr>
<tr>
<td>Stakeholders expect both physical and digital options</td>
<td>30%</td>
</tr>
<tr>
<td>Physical offerings alone couldn’t provide a holistic experience</td>
<td>28%</td>
</tr>
<tr>
<td>Rising digital costs</td>
<td>28%</td>
</tr>
<tr>
<td>Addresses safety concerns</td>
<td>26%</td>
</tr>
<tr>
<td>Prevent erosion of corporate culture</td>
<td>21%</td>
</tr>
</tbody>
</table>

75% said they will invest more in hybrid experiences over the next 12 months.

Executive survey, Q22: Why are you increasing your investments in hybrid experiences? N = 826 (limited to those indicating they will invest in hybrid experiences)

Copyright © 2021 Deloitte Development LLC. All Rights Reserved.
Creating powerful hybrid experiences means empowering people with choices—and embedding feedback mechanisms to design for those choices.
Emerging channels are gaining traction

Younger generations are gravitating toward emerging channels to make purchases

**EMERGING PURCHASE CHANNELS**

- **Social media platform:**
  - 18 - 25: 32%
  - 26 - 45: 32%
  - 46+: 13%

- **Virtual reality headset:**
  - 18 - 25: 9%
  - 26 - 45: 12%
  - 46+: 1%

- **Voice assistant:**
  - 18 - 25: 15%
  - 26 - 45: 15%
  - 46+: 1%

Consumer survey, Q20: In the last month, I have made a purchase through a.

N = 500

Copyright © 2021 Deloitte Development LLC. All Rights Reserved.

2022 Global Marketing Trends | 44
Elevating the hybrid experience

Where human-centered design creates greater choice in physical and digital environments

Empower people with choice—and embed feedback mechanisms along the way

Many executives indicated that they are investing more in hybrid to provide greater personalization. But to really understand what choices consumer segments are gravitating toward, implementing feedback mechanisms can be essential. These mechanisms can include QR codes in physical environments and feedback buttons in the digital sphere.

Build the systems to maintain cohesion across the experience

The proliferation of channels and choice will likely require a data infrastructure that can tie the multiple touchpoints together. That may start with a customer data platform that ties desperate data elements into a cohesive customer journey.

To learn more about these recommendations, read the full Elevating the hybrid experience chapter here.
Supercharging customer service with AI

Combining a reimagined AI strategy with service to unlock a true end-to-end customer experience
We asked consumers to identify what helped them make their purchase—timely offers and knowledgeable customer service consistently rose to the top.
Timely offers and knowledgeable customer service lead the way

Across all eight categories, timely offers and customer service consistently rose to the top

Q14: Did any of the following help you make your purchase decision: (“An offer was presented just when you needed it” and “knowledgeable customer service”) N = 500

PERCENT CITING TIMELY OFFERS AND KNOWLEDGEABLE CUSTOMER SERVICE AS HELPFUL TO MAKING PURCHASES

Helpful options
- A timely offer
- Knowledgeable customer service
- Technology made it easier to learn more about the product / experience
- Customized recommendations
- Free trial / sample
- No hassle return / cancelation policy
- Other
- None of the above

Q14: Did any of the following help you make your purchase decision: (“An offer was presented just when you needed it” and “knowledgeable customer service”) N = 500
Timely offers are regularly fueled by AI while knowledgeable customer service is—or should be—a human-centered endeavor.

Bringing these together can unlock their full potential.
Supercharging customer service with AI

Combining a reimagined AI strategy with service to unlock a true end-to-end customer experience

Marketers don’t have to be data scientists to unlock AI
Between customer data platforms and machine learning, marketers can deploy sophisticated AI use cases without being data scientists themselves. Rather it's about thinking strategically about channel strategies and customer needs and using the tools available to create dynamic customer experiences.

Don’t lose the human touch—empower it
Leaning more on AI doesn't mean removing the human from the experience. Rather, AI can help customer service and contact center agents deliver more thoughtful—and helpful—experiences to customers.

To learn more about these recommendations, read the full Supercharging customer service with AI chapter here.
Thank you

Access the full research and data insights at:
www.deloitte.com/globalmarketingtrends

This presentation contains general information only and Deloitte is not, by means of this presentation, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This presentation is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor.

Deloitte shall not be responsible for any loss sustained by any person who relies on this presentation.

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the “Deloitte” name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.

Copyright © 2021 Deloitte Development LLC. All rights reserved.