Agenda

1  2023 Global Marketing Trends Introduction
   Resilient seeds for growth

2  Trend One
   Brands answer economic instability with marketing investments

3  Trend Two
   Chief marketing officers drive growth through internal sustainability efforts

4  Trend Three
   Creativity as a force for growth

5  Trend Four
   Rising technologies for marketers to watch
We surveyed 1,015 global executives including 115 Australian executives to better understand how top brands are meeting the needs of today’s customers.

n = 1015

Source: Deloitte Global Marketing Trends Executive survey, June 2022
Marketers wear many hats – and their titles reflect the evolving demands of their role.

Base: Australia (n=115)
The 115 Australian Respondents | Demographics

**INDUSTRY**
- B2B: 30%
- B2C: 37%
- Mix of both B2B and B2C: 33%

**BUSINESS TYPE**
- Consumer: 40%
- ER&I: 13%
- FS: 8%
- LS&HC: 27%
- TMT: 12%

**ANNUAL REVENUE**
- $250 million to less than $500 million: 9%
- $500 million to less than $1 billion: 18%
- $1 billion to less than $5 billion: 46%
- $5 billion to less than $10 billion: 15%
- $10 billion to less than $25 billion: 10%
- $25 billion or more: 2%

**ANNUAL GROWTH RATE**
- Increased by 10%-25%: 35%
- Increased by less than 10%: 51%
- Stayed the same: 3%
- Decreased by less than 10%: 3%
- Decreased by 10%-25%: 2%

Base: Australia (n=115)
Brands answer economic instability with marketing investments

Financial uncertainty such as inflation, supply issues and a looming recession is the top-of-mind concern for brands globally. Rather than cost cutting, brands surveyed are planning to weather financial uncertainty with marketing investments.

Globally, the top three strategies include:

1. Accelerating to new digital platforms/technologies
2. Expanding into new markets, segments, and geographies
3. Implementing systems (such as AI) to create greater customer personalization

n=1,015
Australian brands rank financial instability as their top concern— in line with global results.

Top External Challenges | Australia

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial/market instability/inflation</td>
<td>55%</td>
</tr>
<tr>
<td>Supply chain disruption</td>
<td>48%</td>
</tr>
<tr>
<td>Changing regulations</td>
<td>40%</td>
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<tr>
<td>Cyber risk</td>
<td>36%</td>
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<tr>
<td>Crises of trust (e.g., spread of misinformation)</td>
<td>24%</td>
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<tr>
<td>Labor/skills shortage</td>
<td>24%</td>
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<tr>
<td>Geopolitical instability</td>
<td>24%</td>
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<tr>
<td>Natural disasters</td>
<td>18%</td>
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<tr>
<td>Pandemic</td>
<td>17%</td>
</tr>
<tr>
<td>Ideological polarization</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: Australia (n=115)
Surveyed Australian brands ranked implementing systems to enhance customer personalization as their top priority.

Like global respondents, Australian respondents also ranked expanding into new markets and accelerating the move to new digital capabilities within their top three priorities.
Chief marketing officers drive growth through internal sustainability efforts

Leading by example
While there are many potential approaches to sustainability, brands surveyed are concentrating their efforts on shoring up the sustainability of their own internal practices, rather than trying to influence customer behavior. These efforts not only establish an authenticity to brands’ marketing initiatives but leverages heightened awareness of global uncertainties to help build a more secure, sustainable future.

Globally, the top three sustainability strategies include:

1. Improving sustainability of internal marketing practices
2. Promoting more sustainable product and service offerings
3. Establishing long-term sustainability commitments

n=1015
Australian marketers ranked general awareness messaging as their top sustainability priority.

Like global respondents, Australian brands ranked promoting more sustainable offerings and improving sustainability of internal marketing practices as top three priorities.
Creativity as a force for growth

High-growth brands surveyed are prioritizing creativity as a force for long-term growth over their low-growth counterparts. High-growth brands also place a higher priority on increased risk taking, cross-functional collaboration, and looking to the marketing function for its most creative ideas.

TREND 3

86% of respondents agree

The organization's long-term success depends upon its ability to foster creative ideas that can transform the business.
Q21. Please rate your level of agreement with the following statements regarding the role of creativity in your organization: (Strongly Disagree, Disagree, Neither agree nor disagree, Agree, Strongly Agree, Not Applicable)

Filtered by Strongly Agree

- The organization relies on the marketing function for its most creative ideas: 25%
- The organization fosters innovation by encouraging risk-taking and allowing room for failure: 32%
- The organization promotes cross-functional collaboration to foster new ideas: 33%
- The organization’s long-term success depends upon its ability to foster creative ideas that can transform the business: 37%
- The organization’s long-term success depends upon its ability to integrate sophisticated analytical capabilities into its strategy: 42%

Base: Australia (n=115)
Marketer’s Timeline To Partner With Creators | Australia

Q12: In what timeframe, if at all, do you plan to partner with creators/influencers as part of your marketing strategy?

- Currently do: 24%
- Within the next 12 months: 38%
- 12-24 months: 20%
- More than 24 months: 7%
- No plans at this time: 10%

Base: Australia (n=115)
TREND 4
Rising technologies for marketers to watch

Which new technologies most interest marketing leaders this year—and which are likely to sustain their interest over the long term? **Marketers have their eye on expanding their investment in blockchain and the metaverse.**

- 38% are making plans for the *metaverse* this year
- 41% have plans for implementing *blockchain* this year

Although nascent, marketers are laying the groundwork for adoption of new technologies this year. To stay relevant, brands should consider laying out strategy that will benefit them in the long term.

(n=1015)
Q11. In what timeframe, if at all, does your brand plan to actively participate within the metaverse?

- 39% Within the next 12 months
- 38% 12 – 24 months from now
- 8% More than 24 months from now
- 7% No plans at this time
- 6% Currently do
- 2% Unsure

Base: Australia (n=115)
Q14. In what timeframe, if at all, do you plan to support your advertising strategy with blockchain technologies?

- **Currently doing**: 13%
- **Within the next 12 months**: 50%
- **12 – 24 months from now**: 28%
- **More than 24 months from now**: 3%
- **No plans at this time**: 6%
- **Unsure**: 0%

Base: Australia (n=115)