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 50 Saudi 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.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Chief Marketing Officer</td>
<td>46%</td>
</tr>
<tr>
<td>Chief Digital Officer</td>
<td>20%</td>
</tr>
<tr>
<td>Chief Revenue Officer</td>
<td>8%</td>
</tr>
<tr>
<td>Chief Commercial Officer</td>
<td>6%</td>
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<tr>
<td>Chief Merchandising Officer</td>
<td>6%</td>
</tr>
<tr>
<td>Chief Creative Officer</td>
<td>4%</td>
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<tr>
<td>Chief Brand Officer</td>
<td>4%</td>
</tr>
<tr>
<td>Chief Content Officer</td>
<td>2%</td>
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<tr>
<td>Chief Growth Officer</td>
<td>2%</td>
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<tr>
<td>Chief Customer Officer</td>
<td>2%</td>
</tr>
<tr>
<td>Chief Experience Officer</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: Saudi Arabia (n=50)
The 50 Saudi Respondents | Demographics

**INDUSTRY**
- Consumer: 10%
- ER&I: 26%
- FS: 14%
- LS&HC: 14%
- TMT: 38%

**BUSINESS TYPE**
- B2B: 16%
- B2C: 12%
- Mix of both B2B and B2C: 80%

**ANNUAL REVENUE**
- $250 million to less than $500 million: 14%
- $500 million to less than $1 billion: 12%
- $1 billion to less than $5 billion: 4%
- $5 billion to less than $10 billion: 26%
- $10 billion to less than $25 billion: 26%
- $25 billion or more: 14%

**ANNUAL GROWTH RATE**
- Increased by more than 25%: 6%
- Increased by 10%-25%: 62%
- Increased by less than 10%: 28%
- Stayed the same: 2%
- Decreased by less than 10%: 2%

Base: Saudi Arabia (n=50)
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

Base: Global results (n=1015)
Top External Challenges | Saudi Arabia

**ALL INDUSTRIES**

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Cyber risk</td>
<td>54%</td>
</tr>
<tr>
<td>Financial/market instability/inflation</td>
<td>38%</td>
</tr>
<tr>
<td>Pandemic</td>
<td>34%</td>
</tr>
<tr>
<td>Supply chain disruption</td>
<td>30%</td>
</tr>
<tr>
<td>Natural disasters</td>
<td>30%</td>
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<tr>
<td>Crises of trust (e.g., spread of misinformation)</td>
<td>26%</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>Ideological polarization</td>
<td>22%</td>
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<tr>
<td>Changing regulations</td>
<td>18%</td>
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</tbody>
</table>

*Base: Saudi Arabia (n=50)*

In contrast with global results, Saudi CMOs’ top concern lies in cyber risk, topping financial instability by a wide margin.
Saudi CMOs’ priorities differ significantly from the global results.

Developing, acquiring, and retaining talent is Saudi CMOs’ #1 priority.

Deploying brand as an enterprise strategy comes in at #2.

Creating new products and expanding into new markets tie for the #3 priority among Saudi CMOs.
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

Base: Global results (n=1015)
Saudi marketers’ top three sustainability strategies differ from global results.

At 64% of Saudi marketers, the top strategy is highlighting internal sustainability practices.

Close behind at 56%, establishing long-term commitments is the #2 strategy.
TREND 3
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.

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agreement</th>
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<tbody>
<tr>
<td>The organization fosters innovation by encouraging risk-taking and allowing room for failure.</td>
<td>40%</td>
</tr>
<tr>
<td>The organization relies on the marketing function for its most creative ideas.</td>
<td>54%</td>
</tr>
<tr>
<td>The organization's long-term success depends upon its ability to integrate sophisticated analytical capabilities into its strategy.</td>
<td>62%</td>
</tr>
<tr>
<td>The organization promotes cross-functional collaboration to foster new ideas.</td>
<td>62%</td>
</tr>
<tr>
<td>The organization's long-term success depends upon its ability to foster creative ideas that can transform the business.</td>
<td>66%</td>
</tr>
</tbody>
</table>

Base: Saudi Arabia (n=50)
Marketer’s Timeline To Partner With Creators | Saudi Arabia

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

Saudi CMOs have much more aggressive plans for creator partnerships in contrast to global results.

Currently do

<table>
<thead>
<tr>
<th>Currently do</th>
<th>Within the next 12 months</th>
<th>More than 24 months</th>
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<tbody>
<tr>
<td>48%</td>
<td>48%</td>
<td>4%</td>
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Base: Saudi Arabia (n=50)
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?

- Currently do: 40%
- Within the next 12 months: 42%
- 12 – 24 months from now: 12%
- More than 24 months from now: 4%
- No plans at this time: 2%

Base: Saudi Arabia (n=50)
Q14. In what timeframe, if at all, do you plan to support your advertising strategy with blockchain technologies?

- **Currently do**: 38%
- **Within the next 12 months**: 48%
- **12 – 24 months from now**: 10%
- **More than 24 months from now**: 4%
- **No plans at this time**: 0%

**Base**: Saudi Arabia (n=50)