Era of alignment

Future-focused strategies for brand building and customer acquisition

Nielsen

Global annual marketing report 2022

Foreword

Navigating constant change isn't easy, but it is what makes the role of the CMO so exciting, as well as one of the most challenging.

Agility has never been more paramount. We continue to hear from marketers that an adaptive mindset is the most important attribute to have in business today. Combine that with a clear and real-time understanding of consumers and their behaviors, and brands become well positioned to hone their messages, allocate their ad spend, adjust their media mix and optimize to drive ROI.

With real-time changes in consumer attitudes, behavior and media engagement, the right data is more important than ever. Robust and accurate data must be marketers' north star for understanding and engaging the consumer and for measurement and attribution that enables the highest ROI. With the complexities of ongoing disruption and media fragmentation, several things remain constant: the need to know consumers and clients, what they want from you and how you most effectively and efficiently can engage them.

Consumers want brands to know them. It's a progressively tall order, but it's not out of reach. It's also what's blurring the line between brand building and customer acquisition. In fact, the intersection between the two has probably never been closer, and that means a relentless focus on driving business outcomes will depend on exceptional upper-funnel through lower-funnel planning and execution.

Unlike the finite amount of time in a single day, device and platform choices are seemingly infinite. As consumers toggle between devices and platforms, it's clear that their attention can be divided. But there's always a time and place where they focus—and that's where marketers must be, armed with the right message.

Jamie Moldafsky
Chief Marketing and Communications Officer

Nielsen

2022 global annual marketing report

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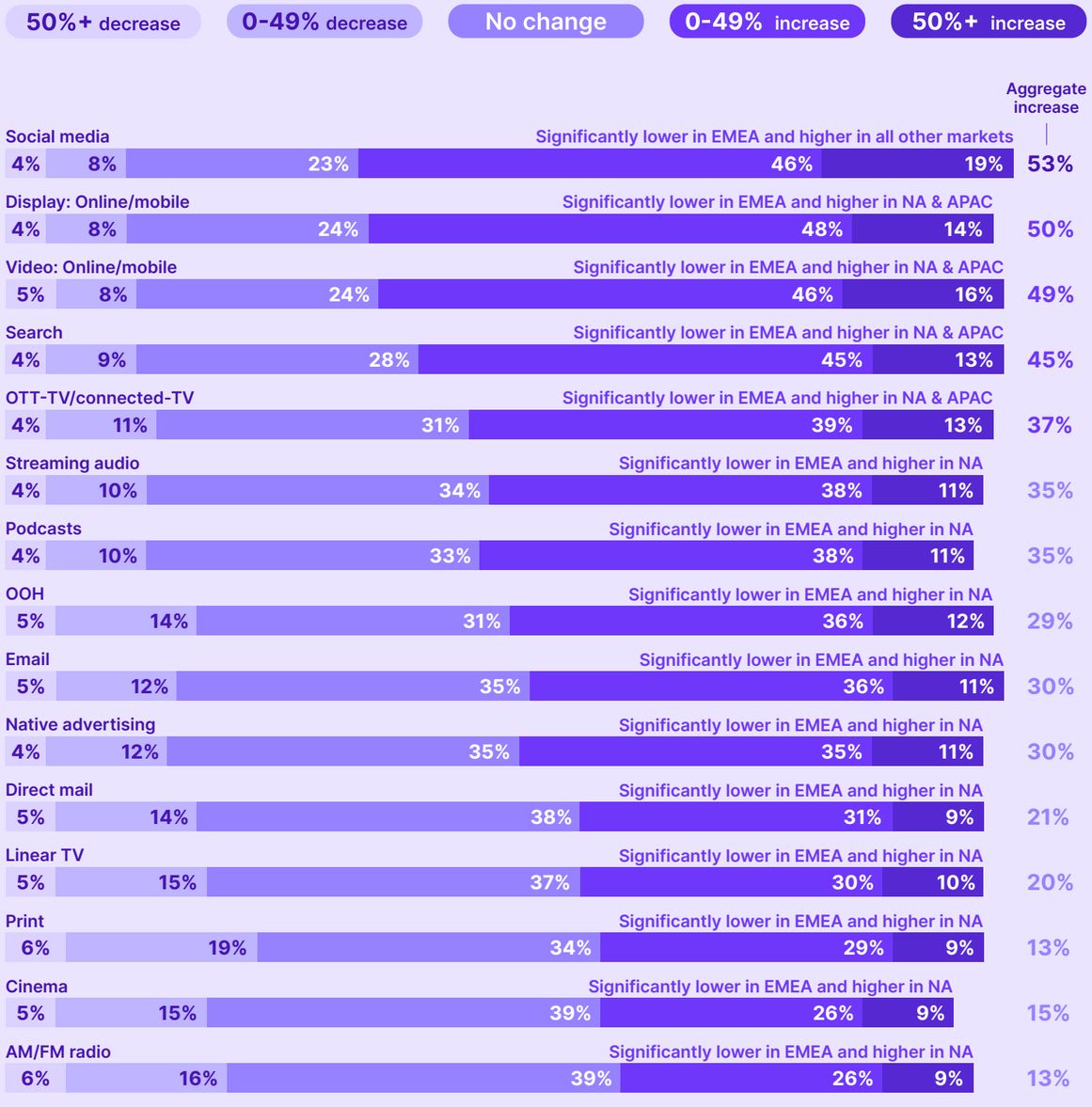
Introduction

Despite the difficulty of the past two years, brands continue to rebalance their marketing efforts after widespread pullbacks in 2020, especially with respect to traditional mass reach channels. In the U.S. for example, brands spent more than $74 billion on network, cable and spot TV advertising last year, well above the $57.4 billion they spent in 2020[1]. WPP's GroupM expects a solid year for the ad market in 2022, forecasting global growth of 9.7%, and the planned spending among the marketers we surveyed for this year's marketing report aligns, as they anticipate increased spend across all channels. In select digital channels, the planned increase will be as high as 53%.

Consumer behavior isn't just in flux—it has changed.

As it always has been, data is a marketer's guiding light. But that data—which should be increasingly rooted in an effective first-party data strategy—should be plugged into scalable marketing solutions that brands of all sizes can use to approach all decisions with precision to arrive at reliable, growth-driving outcomes.

Expected budget change over the next 12 months among global marketers



Percentages represent responses to this question: How do you expect your budgets to change in the next 12 months for each of the following paid media channels?
Note: The data may not sum to 100% because the charts do not display data for 'not applicable,' 'prefer not to say' and 'don't know'.

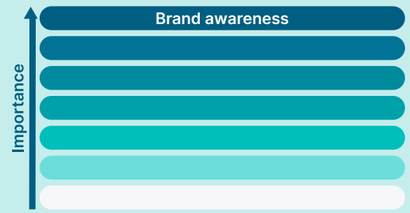
[1] Nielsen Ad Intel

Key takeaways

Brand awareness has never been more important

Global marketers are united in stating that building brand awareness is their top objective. Today, amid media fragmentation and sources of brand equity sources evolving, brands need to leverage an array of channels to reach the widest audiences.

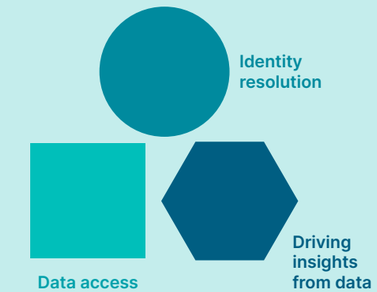
Advertiser's objectives



Use data to champion personalized marketing strategies

Globally, marketers understand the need for audience data, yet they struggle with varying aspects of their data strategies, citing notable challenges with data access, identity resolution and being able to derive actionable insights.

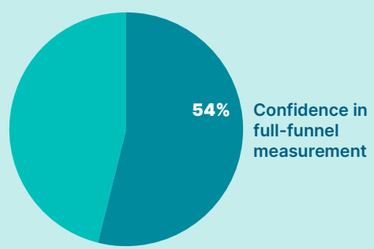
Major data challenges



Un-silo your measurement

Consumer journeys have never been siloed, but increasing media fragmentation amplifies the need for holistic measurement. Globally, marketers are somewhat confident in ROI measurement across select channels, but their confidence in full-funnel ROI measurement stands at just 54%.

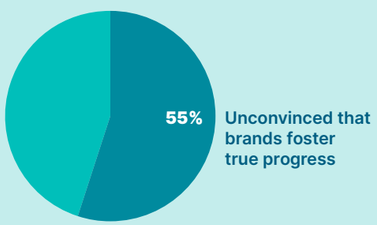
Channel measurement



Make your brand your promise

Consumers want more than just a product or service from brands, and purpose-driven initiatives are proving their weight in ROI. Global marketers say their brands are emphasizing purpose, but Nielsen data shows that 55% of consumers aren't convinced that brands are fostering true progress.

Consumer belief in brand progress



Driving brand awareness has never been more important

Top marketing objectives for the next year

Numbers represent responses to this question: Please rank, in order of importance, each of the following marketing objectives for your business from most important (1) to least important (7)

The notable increase in advertising spend over the past year aside, marketer objectives, strategies and tactics are largely unchanged from what we saw a year ago. Brand awareness and new customer acquisition remain top objectives, and marketers continue to increase their spending across social media and online channels (display and video) as consumers' media behaviors evolve.

Marketers' top objective makes sense, as the need to drive awareness has never been more important. In addition to the prevalence of consumer choice and access, some traditional sources of brand equity are less apparent than before the pandemic simply because of reduced visibility. With many consumers shopping less regularly at physical stores, for example, the frequency of seeing a product on a shelf or a sign in a store window has declined.

Factors affecting brand equity

Fewer people are driving to stores and shopping inside them, which reduces equity support simply because people aren't seeing logos on shelves or on storefronts as much.

The online "shelf" is infinite, which makes it increasingly difficult for single brands to stand out.

Disrupted supply chains from electronics to auto to lumber have affected brand and product availability, forcing customers to try alternatives. The circumstances and resulting behavior cause a lost source of equity.

Source: Nielsen Brand Resonance report

In today's world, it's a risky proposition to take non-marketing sources of equity for granted. These examples also elevate the importance of staying top-of-mind with consumers when a sale is at stake.

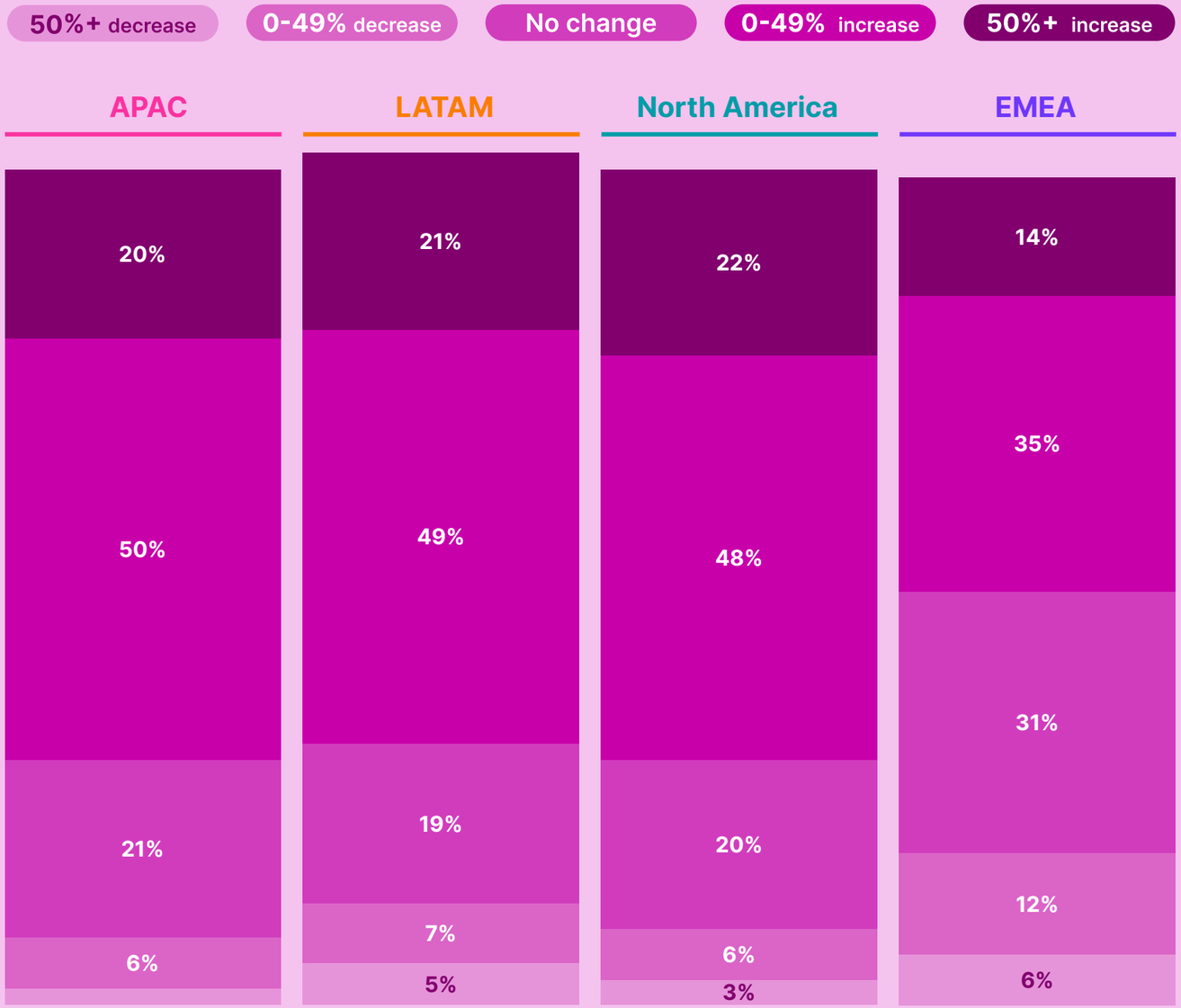
> ***Nielsen data shows that marketing accounts for 10%-35% of a brand's equity***

There is no discounting the growing reach of select digital channels, such as online video and connected TV, and marketers are increasing their spend accordingly. Importantly, they'll want to ensure that their spend is reaching the right audiences—real people making real choices. In December 2021, for example, YouTube reached 135 million people on TV screens alone[2]. YouTube is also a strong competitor in the streaming space, as Americans streamed 177.3 billion minutes of video[3] on the platform in January 2022.

[2] Nielsen Streaming Platform Ratings [3] The Gauge, February 2022

Social media remains global marketers' most bankable channel, as 64% say it's their most effective paid channel. And many brands are finding success with social media, especially on platforms like TikTok and Instagram. The popularity of these channels and growing brand successes are influencing increased spend, as **global marketers plan to boost their social media budgets more than any other channel over the next year.** The global average, however, would be higher if it weren't for marketers in Europe, Middle East, and Africa (EMEA), as they intend to increase their spending less than marketers elsewhere. The planned spend across social media is also interesting, as the marketers we surveyed say they are not prioritizing engagement with Gen Z as a key business priority even though their primary increases focus on platforms like TikTok and Instagram.

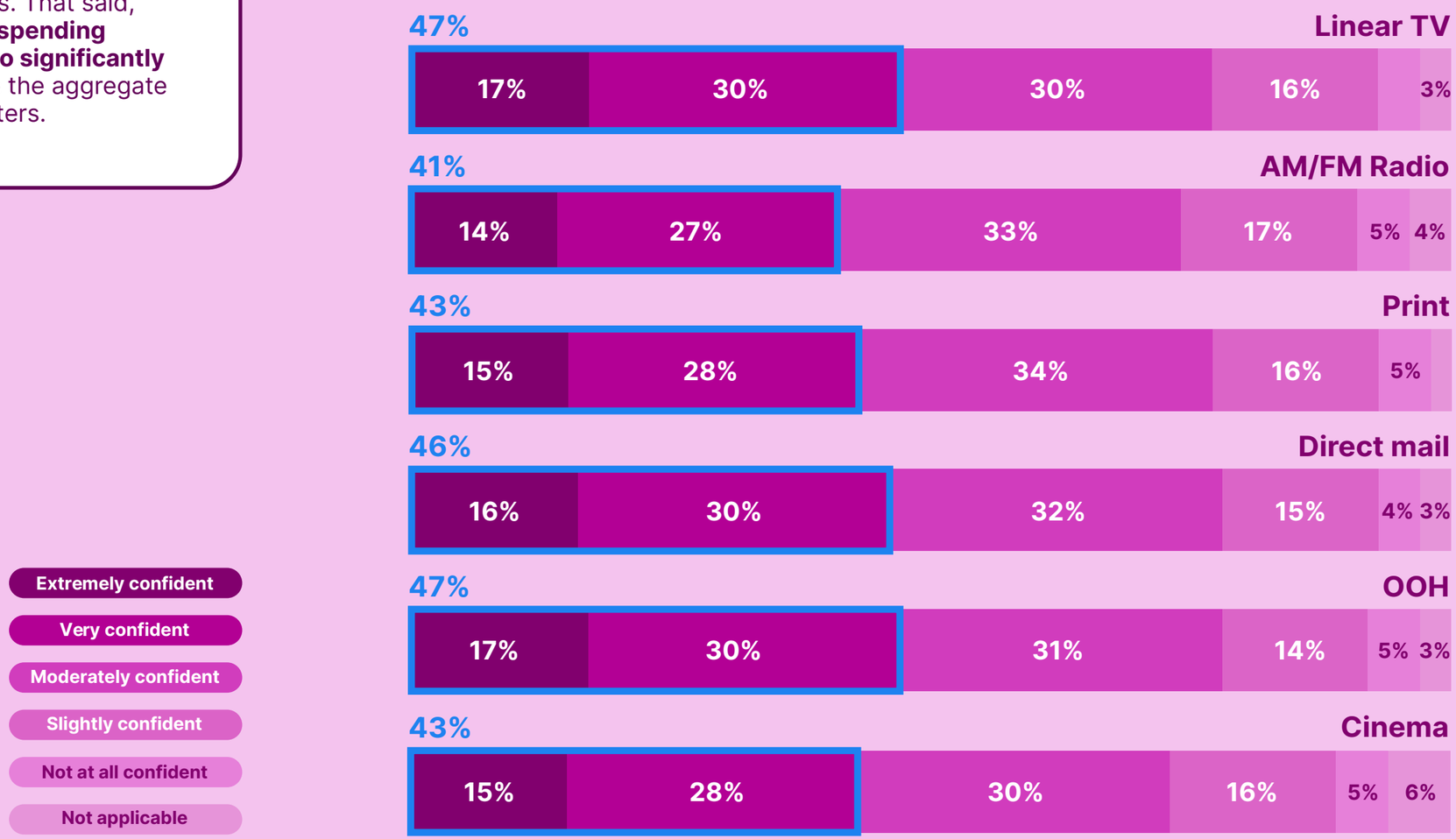
Expected change in social media spending by market



Percentages represent anticipated changes in social media spending over the next 12 months.
Note: The data may not sum to 100% because the charts do not display data for 'not applicable', 'prefer not to say' and 'don't know'. Percentages below 3% not shown.

Compared with paid digital, global marketers plan to increase their spending across traditional channels less, particularly across mass-reach options like TV and radio. In addition to garnering higher consumer trust than many digital channels[4], TV and radio are more traditionally aligned with brand building and new consumer acquisition efforts. That said, **marketers plan to increase their ad spending across linear TV and traditional radio significantly less** than across social media, where the aggregate increase is 53% among global marketers.

Perceived effectiveness of primary paid traditional channels



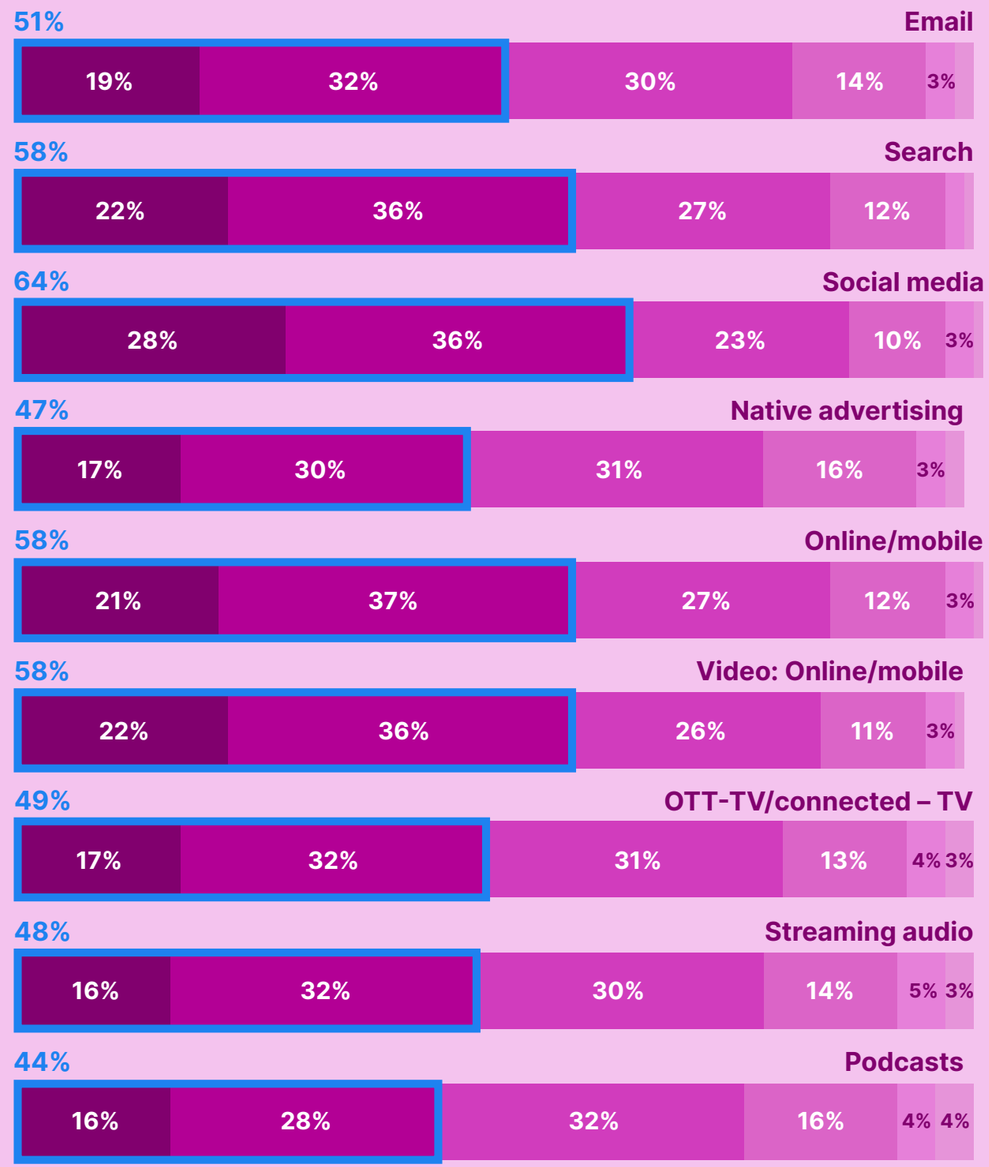
Percentages represent responses to this question: Please rank the effectiveness of each of the following paid media channels for your business.

Note: The data may not sum to 100% because the charts do not display data for 'not applicable', 'prefer not to say' and 'don't know'. Percentages below 3% not shown.

[4] 2021 Nielsen Trust in Advertising Survey

While 61% of global survey respondents say they are confident in their ability to measure the impact of brand building, their **planned limited increases in ad spending across traditional mass reach channels highlights a possible misalignment between top business goals and marketing tactics**. It also highlights the lesser amount of confidence among marketers in the effectiveness of traditional channels when compared against digital ones.

Perceived effectiveness of primary paid digital channels



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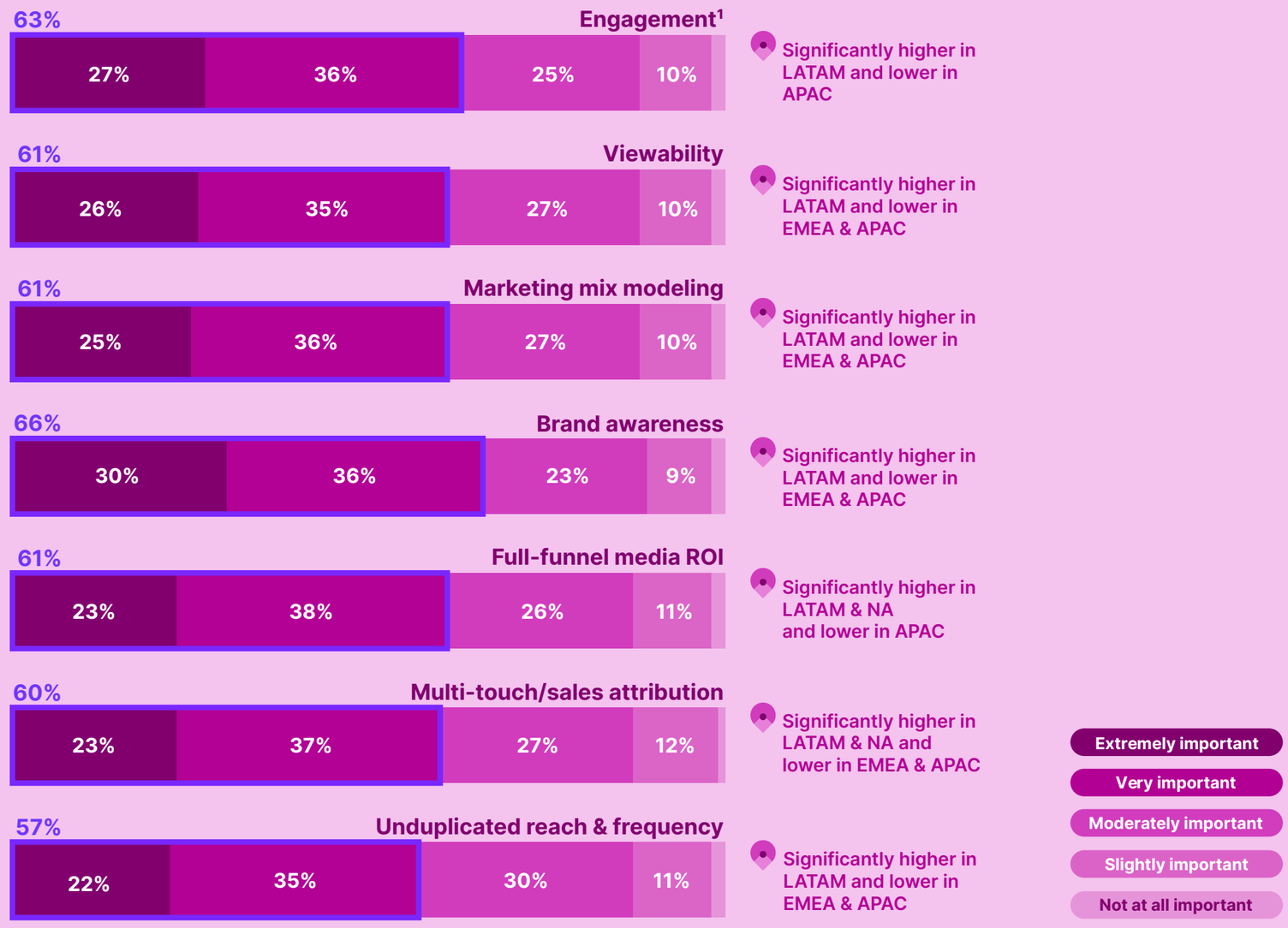
Percentages below 3% not shown.

The stated high confidence in their ability to measure the effectiveness of their brand-building campaigns notwithstanding, it's not uncommon for brands to find it challenging to quantify the effects of brand building on long-term sales. Marketers are always pressured to deliver ROI for their efforts, so it's not surprising to see a greater focus on short-term wins—especially in recent years. The good news is that Nielsen's experience base shows that on average, a 1-point gain in brand metrics, such as awareness and consideration, drives a 1% increase in sales.

When it comes to new customer acquisition, patience will be a brand's best friend. According to Nielsen Commspoint Journey, a survey of purchase journeys across 80 product categories found that 85% of purchases involved brands the customer had already tried in the past. Additionally, 22% of consumers report feeling worried or nervous about trying a new brand.

Brand awareness tops the list of important marketing metrics



Percentages represent responses to this question: Please rank the importance of each of the following metrics/measurement capabilities to your organization.
Note: The data may not sum to 100% because the charts do not display data for 'not applicable', 'prefer not to say' and 'don't know'. Percentages below 3% not shown.
[1] E.g. Time spent, video views, clicks... etc.

[5] Nielsen's Take command of your brand report

Nielsen

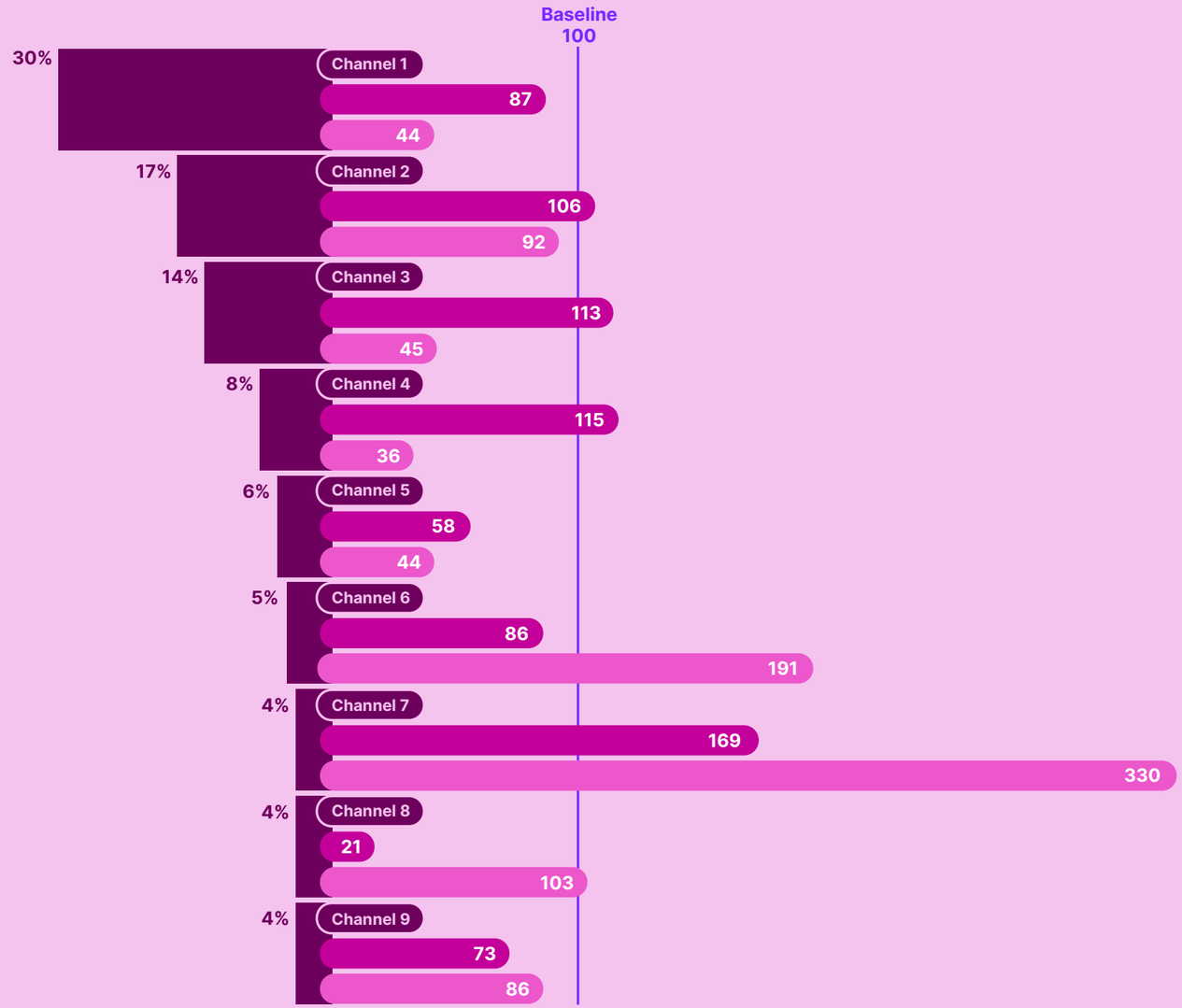
Channel effects: short- vs. long-term impacts

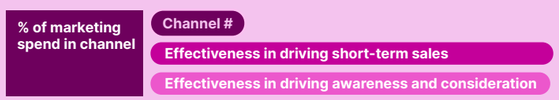
Understanding consumer needs and behaviors is a great way to partner with consumers. Brands that partner with consumers, clearly articulate their company's value proposition and meaningfully engage with them, will develop the foundation for long-term relationships with them.

"A 1-point gain in brand metrics would drive $1 million in sales for a brand that generates $100 million in annual sales"

To illustrate, consider the marketing spend case from an insurance brand. It highlights just how difficult it can be to use lower-funnel impacts to optimize the upper funnel (awareness).

Index of each channel's effectiveness vs. overall marketing effectiveness





Read as: Channel 1 accounted for 30% of the marketing spend for the campaign. Relative to the 30% contribution to spend, Channel 1 produced 13% less short-term sales than would be expected (based on fair share of spend), and lifted awareness and consideration 56% less than would be expected.

Source: Nielsen Marketing Mix Models

Key recommendations for marketers

For building brand awareness

Align your marketing strategy and tactics with KPIs that can be achieved through established tactics.
The last several years have been a rollercoaster ride, so it's natural that marketers want to put their money in channels and tactics that deliver immediate ROI. However, marketers are increasingly more interested in driving brand awareness, requiring a different set of channels, tactics and KPIs.

Stay top-of-mind with consumers across the platforms and channels they spend their time.
Many traditional sources of brand equity have become less visible in recent years as people spend more time at home or do more of their shopping online. The increased pressure on non-marketing sources of equity elevates the importance of marketing in preserving a brand's health.

Lean into the mass reach capabilities of digital channels.
Yes, linear TV is, on average, one of the most effective channels for driving long-term sales lift, but next-gen channels like online video and CTV are increasingly growing in their ability to engage very wide audiences and can help round out well-balanced and holistic marketing strategies.

Ensure that your cross-platform measurement isn't siloed

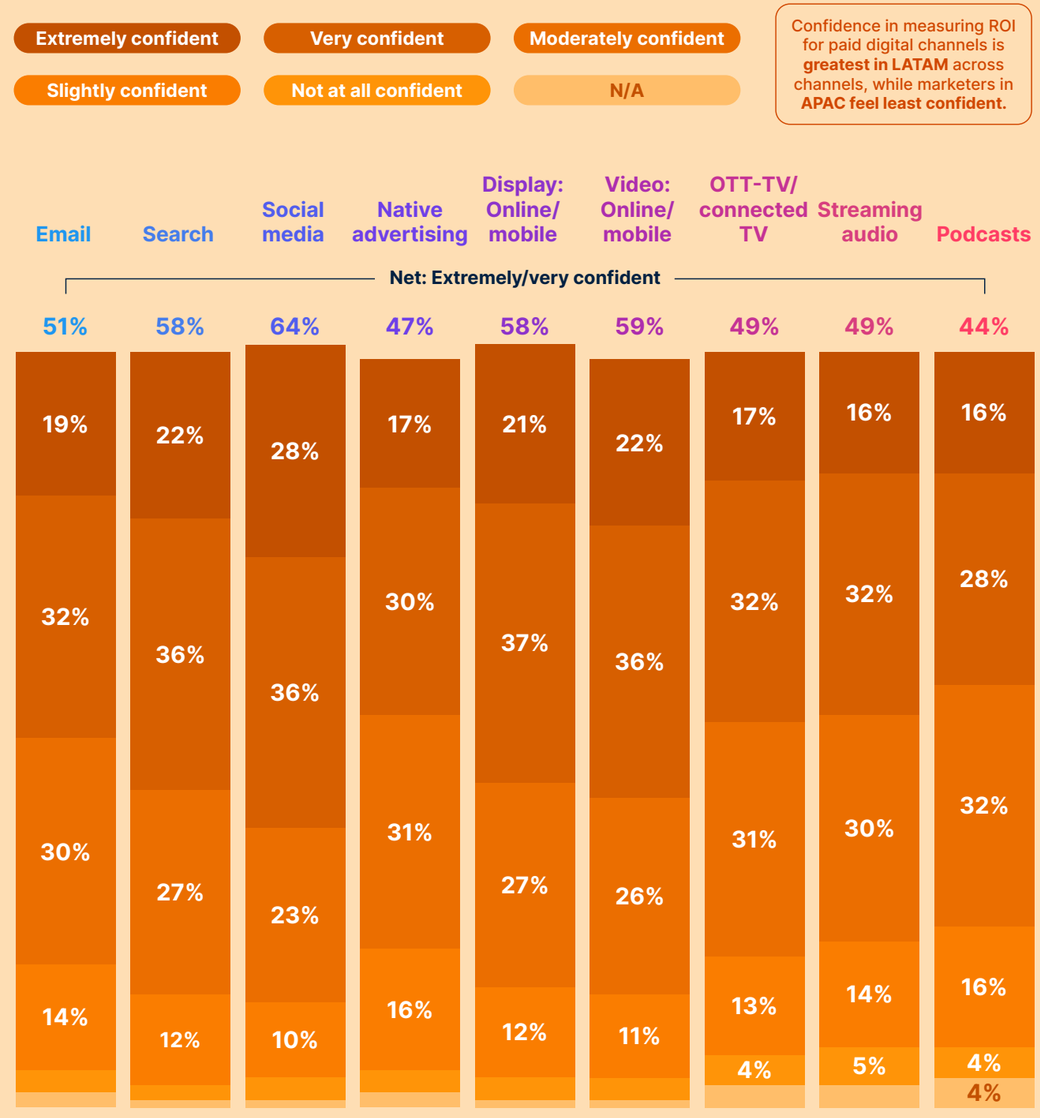
From a marketing perspective, technology to engage, measure, optimize and prove ROI has never been more rampant, but marketers should be increasingly focused on strategies that provide holistic views of consumers—not just channel—or platform-specific look-ins.

> ***While marketers are most confident in measuring ROI from social media, global measurement confidence is only 64%***

Across paid digital channels, global marketers surveyed are most confident in their ability to measure ROI across social media (64% are extremely or very confident; equal to their perceived effectiveness of the channel). Confidence in measuring social media ROI is significantly higher in Latin America (86%) and notably lower in Asia-Pacific (55%), while North America comes in at 59% (behind paid search at 60%). In light of the planned increases across social media over the next year, global marketers' confidence in measuring its ROI—outside of Latin America—is low.

The lack of ROI-proving confidence in these preferred channels suggests an opportunity for martech providers to help brands improve their execution and results. Perhaps more important is the lack of confidence that global marketers have in measuring ROI across other paid and traditional channels.

Confidence in measuring the ROI across paid channels



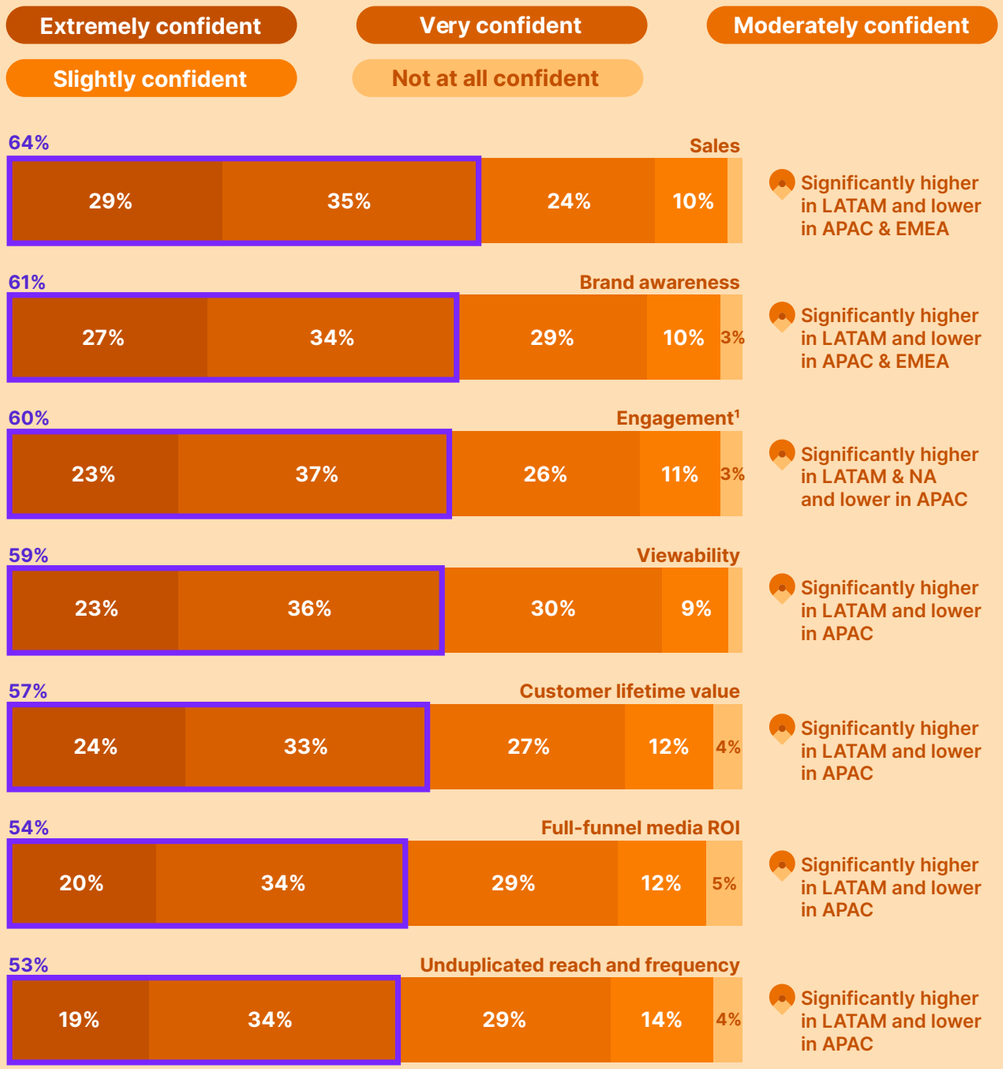
Percentages represent responses to this question: How confident are you in your ability to measure ROI for each of the following paid media channels?

Note: The data may not sum to 100% because the charts do not display data for 'not applicable', 'prefer not to say' and 'don't know'. Percentages below 4% not shown.

The marketers surveyed for this year's report spent more than half of their 2021 advertising budgets on digital channels, noting significant planned increases over the next year. **Despite leaning into newer channels, however, many marketers express lackluster confidence in being able to prove ROI.** Almost half (49%) of global marketers, for example, said they plan to increase their spending on podcasts over the next year, with 11% planning increases of more than 50%. That said, their confidence in measuring the ROI of that investment is fairly low. Only 44% are either extremely or very confident.

There may not be much confidence tracking podcast ROI, but marketers shouldn't overlook this growing media channel. Nielsen's Podcast Ad Effectiveness (PAE) solutions show that host-read ads drive a brand recall rate of 71%, which subsequently creates high levels of consumer interest, purchase intent and recommendation intent. Globally, two-thirds (65%) of marketers believe new formats, like podcasts, brand integrations and sponsorships are greatly important to marketing strategies. This sentiment is less in Asia-Pacific (59%) and EMEA (58%), but greater in North America (71%) and Latin America (73%).

Confidence in measurement by metric



Percentages represent responses to this question: How confident are you in your organization's ability to accurately measure the following?
Note: The data may not sum to 100% because the charts do not display data for 'not applicable', 'prefer not to say' and 'don't know'. Percentages below 3% not shown.
¹ E.g. Time spent, video views, clicks, … etc.

Consumer journeys aren't isolated to platforms and channels, but only 54% of global marketers are confident in their ability to measure full-funnel ROI. Somewhat surprisingly, 73% of marketers globally express satisfaction with their measurement tools. The gap between confidence in full-funnel ROI measurement and overall martech satisfaction presents an opportunity for martech companies to provide assurance in measurement capabilities where confidence is muted.

Standard industry solutions don't typically account for both upper- and lower-funnel marketing efforts in the same solution. To address the need for short-term sales and to seed long-term growth, marketers should run effectiveness studies for both short- and long-term ROI. One way to do this is to run marketing mix models (MMMs) to optimize channel mix for short term-sales, and then use a second analysis to optimize channel mix for awareness or other upper-funnel metrics. Finally, brands should look at both plans and weight them together based on organizational goals. This should help brands create a more balanced plan that supports both their short-term needs and their long-term ambitions.

Key recommendations for marketers

For measurement confidence

Leverage the technology that delivers on your needs.
Marketing budgets are no stranger to scrutiny, but the past two years shine an even brighter light on the importance of efficient and effective spending. With relatively low measurement confidence, especially with respect to next-gen channels, global marketers should focus on solutions that provide the confidence they need to prove the effectiveness of their spending.

Remain agile and adaptive.
Having insight into the consumer is the best way to stay agile and adaptive. Investments in trusted and robust data sources will be money well spent.

Optimize throughout the funnel.
Individual industry solutions don't typically account for both lower- and upper-funnel marketing efforts. To validate short-term sales and seed long-term growth, consider running MMM studies for both short- and long-term ROI.

Crystalize your data strategy for a personalized future

Data has never been more important for brands and marketers. Engagement with digital channels continues to rise, and every interaction creates a step in the consumer journey. Understanding the consumers behind those engagements ensures that advertisers are reaching the right audiences with the right messages.

Typically, individual marketing campaigns don't have a single KPI. Instead, they have an array of them, which makes it difficult to align on a single data strategy. For example, an advertiser may want to grow revenue and acquire new customers. Ideally, each of those objectives should have its own data strategy aligned with the appropriate channels. In that way, a "define once, activate everywhere" approach isn't likely to deliver optimal campaign results.

> ***Americans streamed more than 15 million years' worth of video content in 2021***

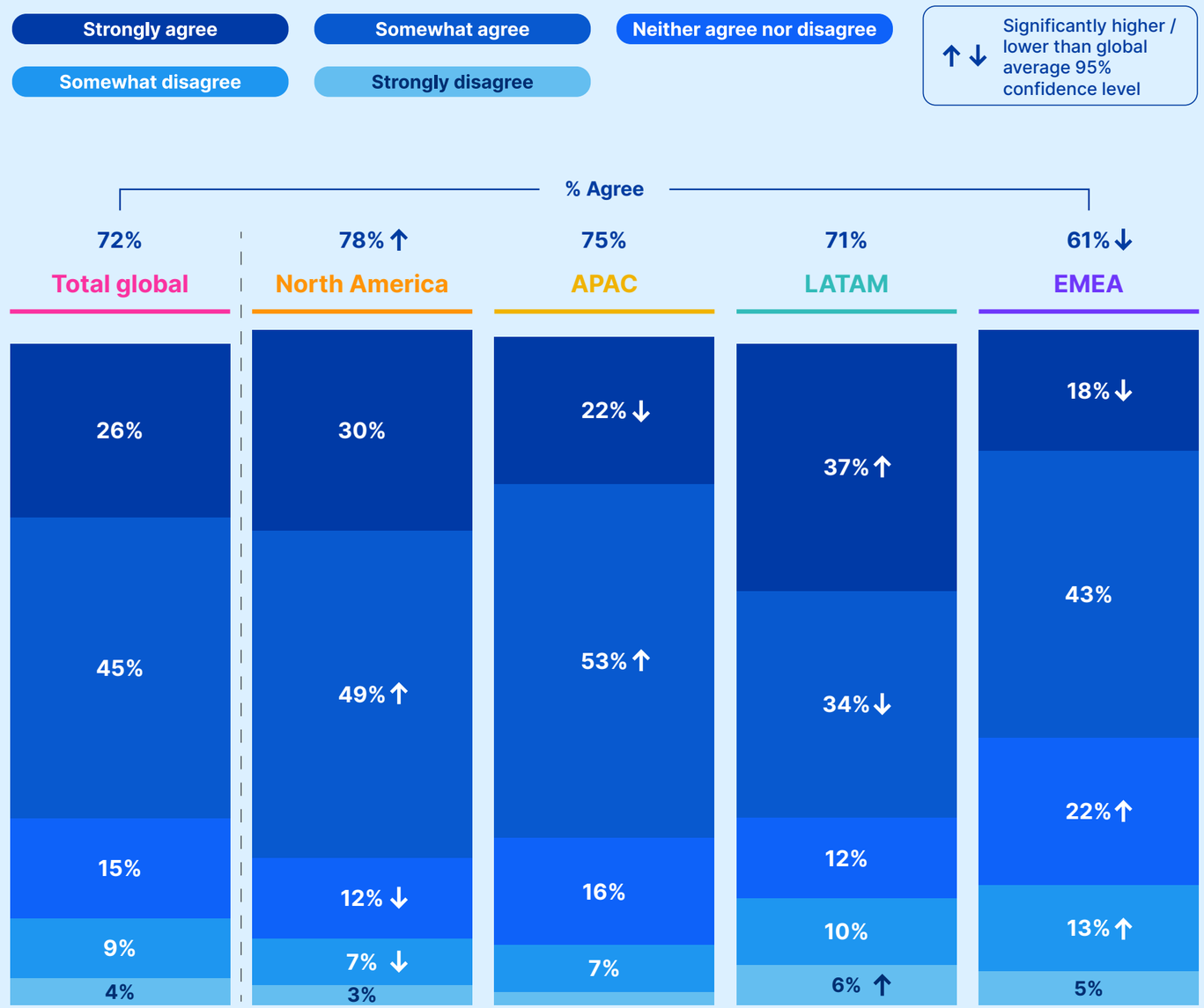
No two audiences are the same, and the increasing proliferation of channels produces an abundance of unique data sets. This is particularly relevant with respect to next-gen channels like connected TV (CTV) and podcasting, which present new challenges to traditional targeting solutions. CTV is especially a growing focus for global marketers, with 51% planning to increase their over-the-top/CTV spending in the coming year. In North America, the percentage is 61%, which aligns with last year's streaming video boom. In the U.S., Americans streamed almost 15 million years' worth of content across subscription- and ad-supported platforms.

Marketers looking to improve performance with better audience targeting should:

- Personalize their efforts at scale by leveraging a combination of contextual and behavioral data
- Unbundle individual households by leveraging solutions that can better identify who within the household is viewing a given program in real time
- Continuously optimize data strategies to ensure alignment with campaign KPIs

To improve and optimize their campaigns and engagements, marketers will need high-quality, deterministically sourced data for comprehensive data strategies. This is particularly relevant for the global marketers surveyed this year, as their complete confidence in audience data is relatively low.

Only 26% of global marketers are fully confident in their audience data

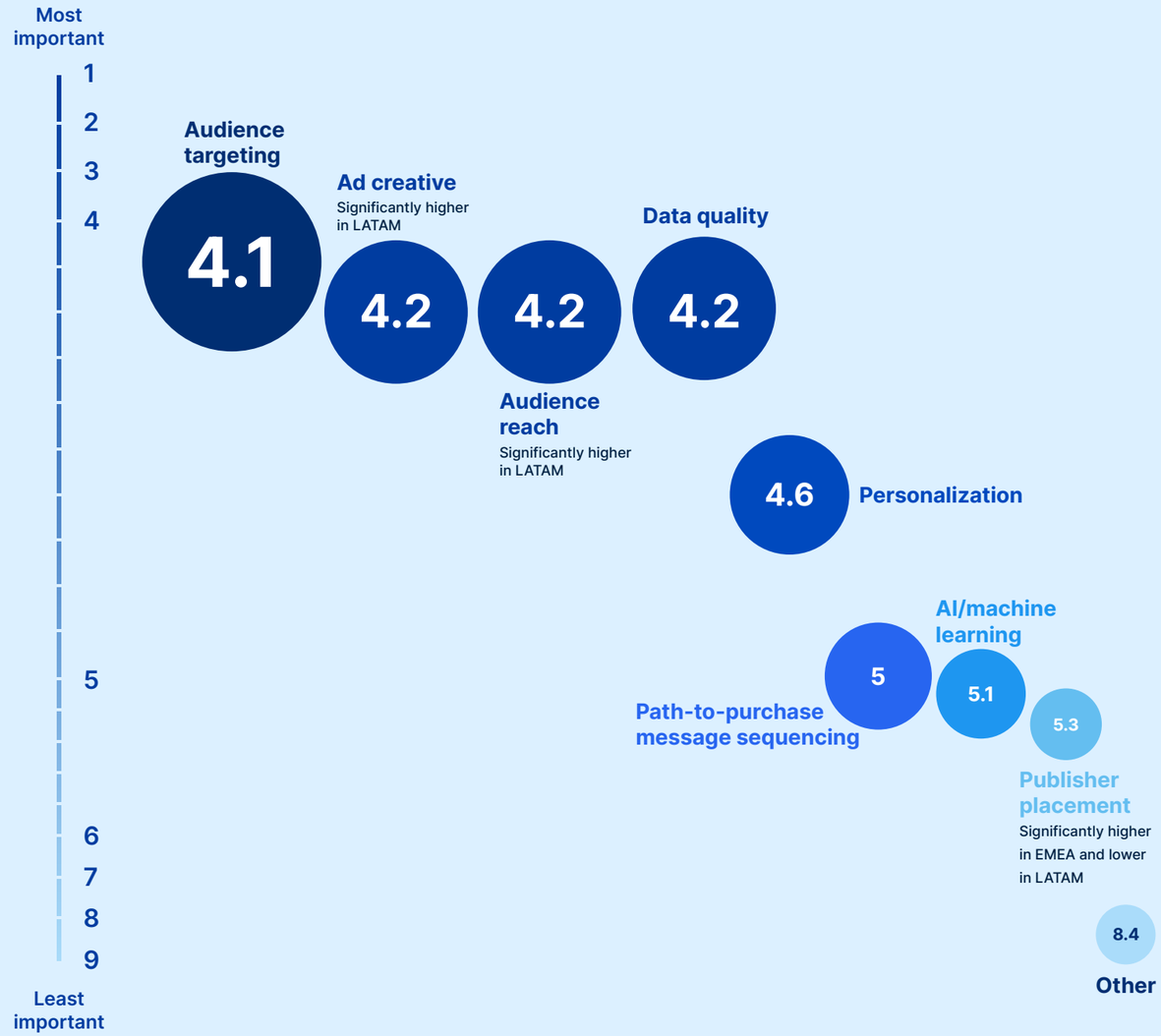


Percentages represent responses to this question: We have access to the quality audience data we need to get the most out of our media budget.
Note: Percentages below 3% not shown.

Data confidence aside, there is widespread agreement that data is essential. Given the many—and growing—sources of data across the media industry, it's easy to see why marketers may agree on its importance, yet have difficulty feeling confident in how to harness its full power.

A majority of marketers (69%) believe first-party data is important for their strategies and campaigns, and even more (72%) believe they have access to quality data to maximize the impact of their media budgets (61% in EMEA and 78% in North America).

Audience targeting is critical in positively influencing campaign performance

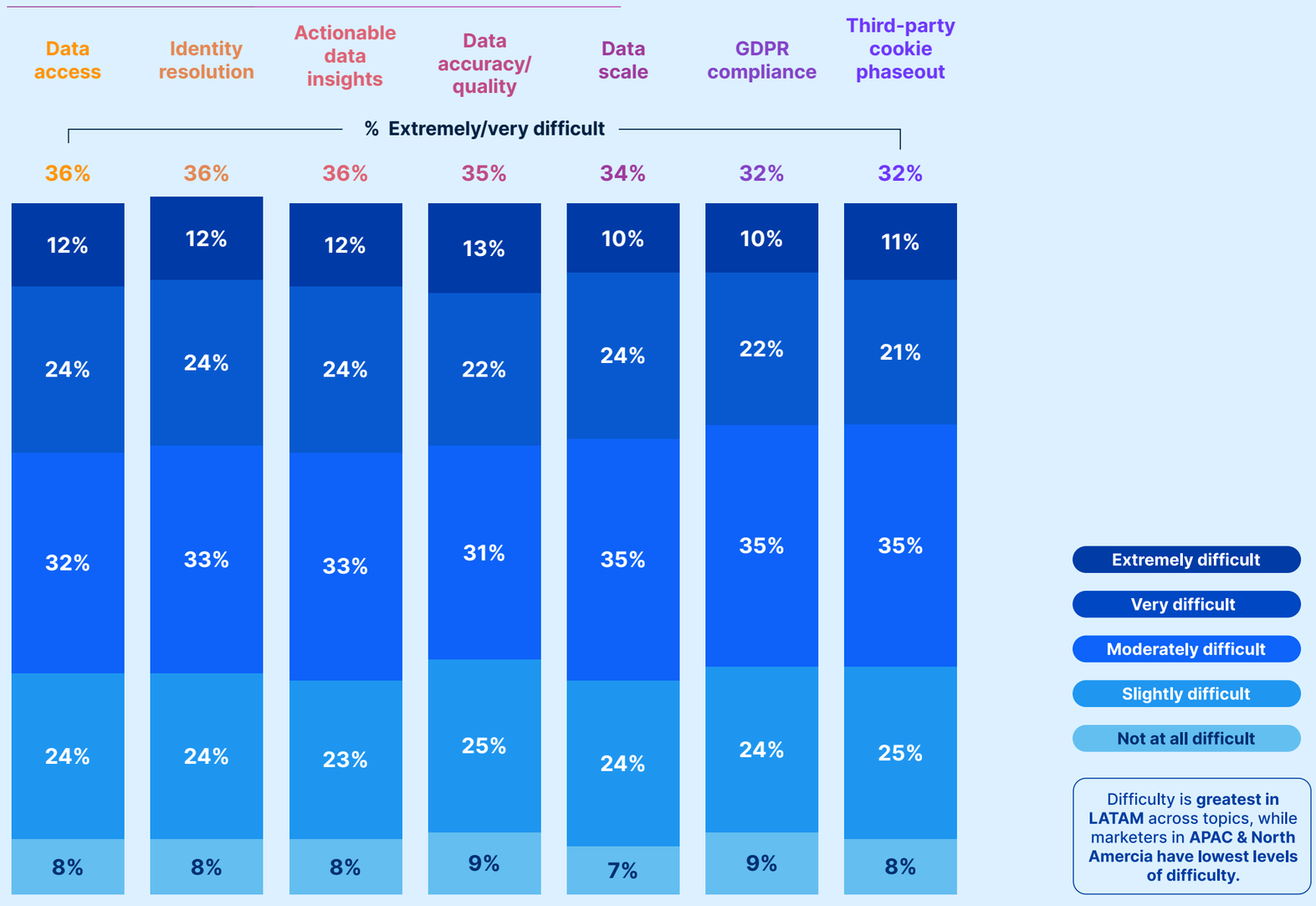


The numbers on the circles reflect ranked order of importance for each marketing tactic from most important (1) to least important (9).

The majority of marketers struggle with elements of audience data

Despite widespread agreement about the importance of quality data, the majority of marketers surveyed struggle with varying aspects of their data strategies. Globally, 36% claim that data access, identity resolution and deriving actionable insights from data is either extremely or very difficult. In Latin America, the percentages are much higher (57%, 54%, 52%, respectively), while marketers in North America and Asia-Pacific claim to have the lowest levels of difficulty.

To overcome these challenges, marketers need to prioritize their data strategies, complete with an investment in first party data—the data companies collect directly from users or people in a consent-compliant way. For brands that don't have the ability to capture data directly from consumers, relationships with data partners who collect customized, quality data in consent-compliant ways will help improve campaign targeting and performance.



Percentages represent responses to this question: What level of difficulty do you face, if any, with each of the following audience data topics?
Note: The data may not sum to 100% due to rounding.

The collection, maintenance and application of person-based identifiers is growing increasingly critical for meaningful, relevant consumer engagements. Complete third-party cookie depreciation is still on the horizon, but the current reality is that just over 40% of U.S. internet users are already using browsers that block them, and others are using browser capabilities to block them on their own.

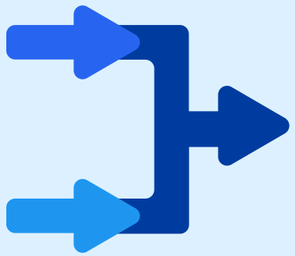
To that end, Nielsen's ID System is paving the way toward stronger, personalized engagements throughout full consumer journeys.

For the Barceló Hotel Group, Identity Sync revealed that 98% of conversions were attributed to actual marketing touchpoints, allowing the company to identify which touchpoints led to bookings and sales, shift resources away from keywords that weren't leading to conversion, and unlock 9% of potential savings in key areas, such as paid search.

Nielsen's attribution solution drives attribution and revenue

98%

Attributable click media touchpoints



23%

Pay per click (PPC) revenue share increased from 9% to 23%

17%

Display revenue share increased from 14% to 17%

Nielsen attribution case study: Barceló Hotel Group

Identity solutions also improve digital ad delivery and measurement, allowing brands to connect digital impressions to specific demographics across billions of devices. With the recent release of the Nielsen Identity System for Digital Ad Ratings, infused with demographic data from a range of providers, advertisers and publishers gain people-based metrics informing them that measured demographics are appropriately assigned and deduplicated across devices.

As identity solutions develop, many marketers continue to leverage contextual targeting solutions to engage with consumers. To deliver the most ROI, however, marketers should fortify their contextual consumer segment data with complementary behavioral data sets.

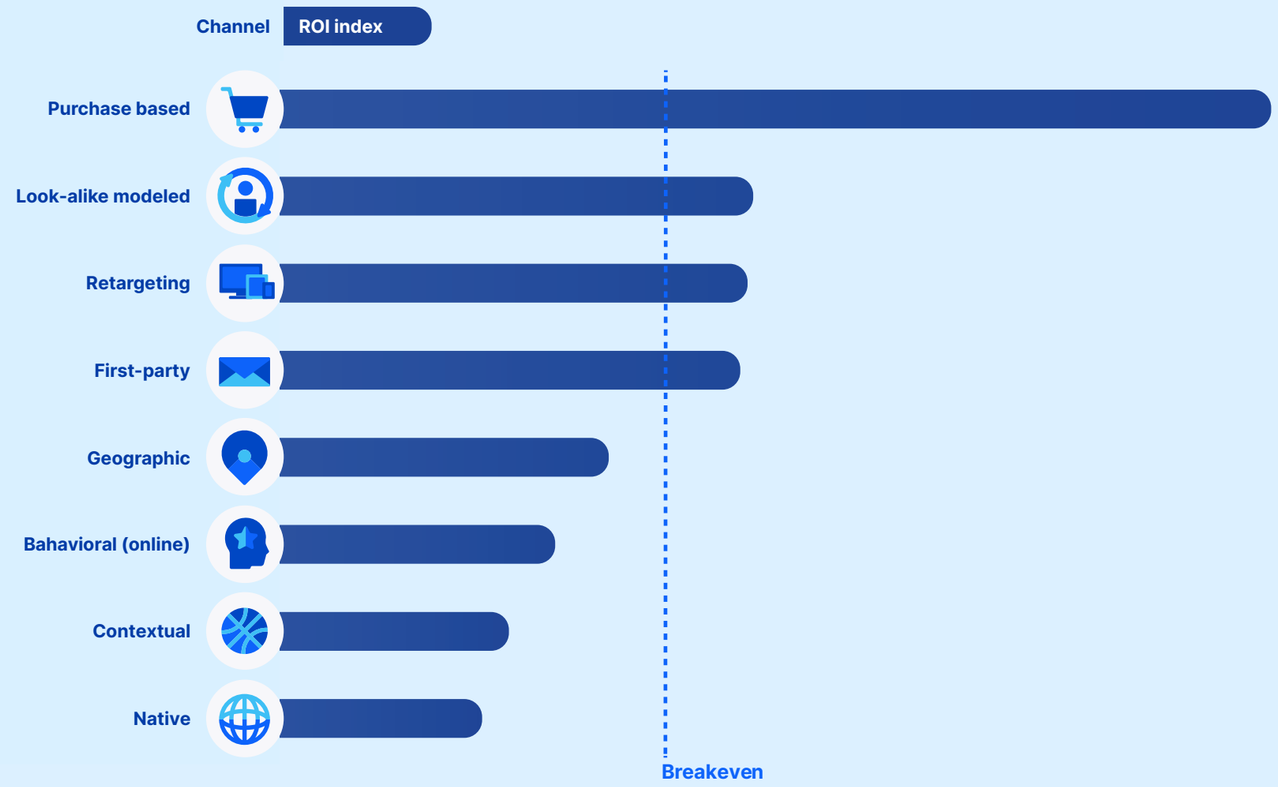
According to a multitude of Nielsen Multitouch Attribution (MTA) studies, behavioral data based on actions people actually take (downloading a coupon, filling out a form, or making a purchase) delivers substantially higher marketing performance than contextual signals alone. The most advanced tactics combine power of both to drive the highest ROI while delivering scale.

Additionally, programmatic addressability doesn't equate to targeting perfection. Data from Nielsen Digital Ad Ratings[6] highlights that the average on-target percentage of ads across computer and mobile is 63%—even for targets defined by age and gender—targets for which there's significant data coverage and quality. Contextual marketing is also less personalized.

To improve accuracy—and deliver more personalized, relevant experiences—marketers should combine contextual and behavioral data, allowing them to personalize at scale and continuously optimize along the way.

[6] Nielsen Advertiser Playbook

Contextual data alone is not a strong signal for delivering high ROI



Source: Nielsen MTA studies

To deliver more personalized, relevant experiences—marketers should combine contextual and behavioral data for targeting

Key recommendations for marketers

For future-forward data strategies

Get to know consumers.
The growing proliferation of consumer touchpoints amplifies the need for marketers to understand consumer behaviors. Investing in high-quality, deterministically sourced data will help marketers keep pace with consumers even when change seems constant.

Effectively engage with consumers on next-gen platforms.
Many traditional targeting solutions aren't built for engaging with consumers across channels like CTV and podcasting. By combining contextual and behavioral data, marketers can be more effective and efficient with their marketing campaigns.

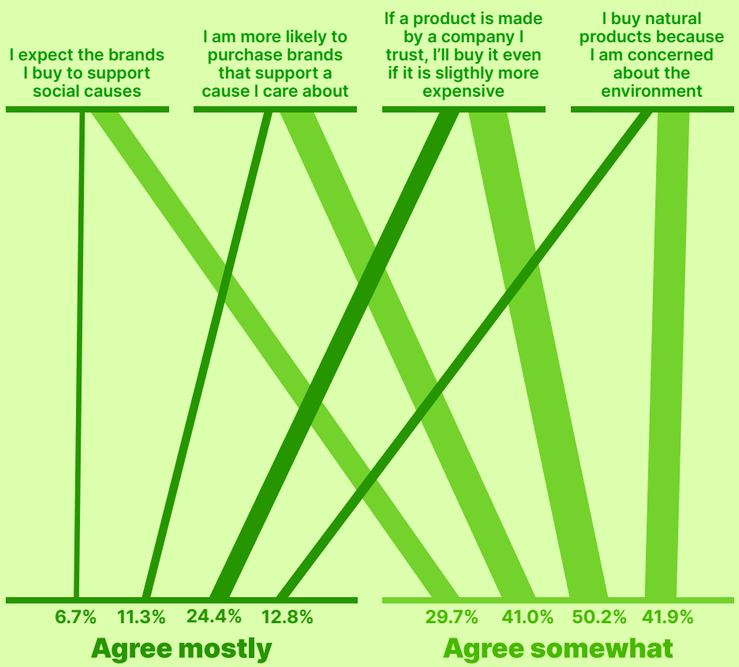
Plan with a focus on privacy.
Consumers increasingly want personalized experiences, and many are already blocking third-party cookies. To deliver, marketers will benefit from solutions that can identify which touchpoints lead to desired outcomes, such as purchases and opt-ins.

Make your brand your promise

Marketers have always shouldered the responsibility of forging connections with consumers, but choice has never been greater, and consumers are increasingly looking for more than just a product or service from the brands they buy.

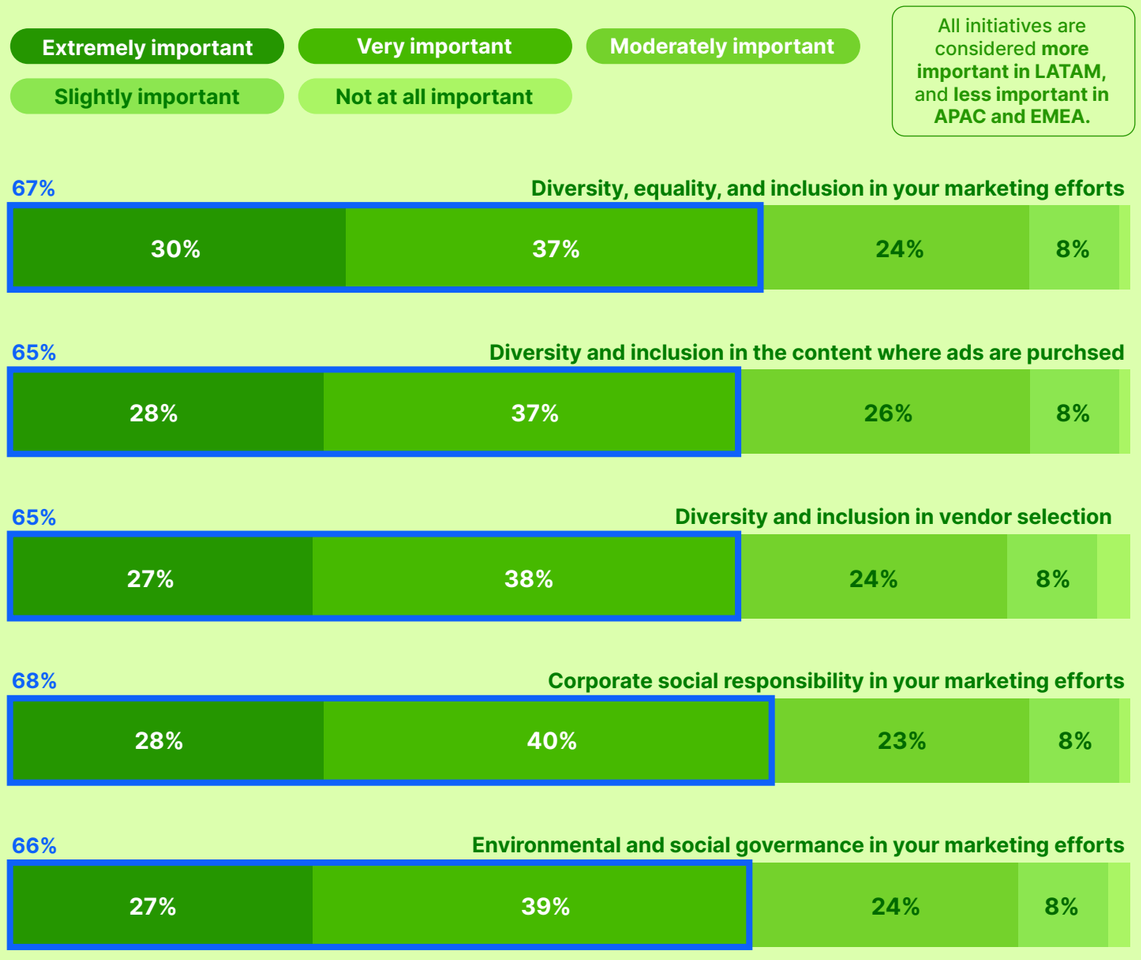
For example, Nielsen Scarborough data highlights that over half of U.S. consumers (52.3%) purchase from brands that support causes they care about; similarly, more than 36% expect the brands they buy to support social causes. Brand trust is also a significant purchase influencer.

What consumers want from brands



Source: Nielsen Scarborough USA+ 2021 Release 1

Diversity and CSR initiatives are fairly equal in importance globally



Percentages represent responses to this question: How important, if at all, are each of the following to your organization?
Note: Percentages below 3% not shown.

The focus on social causes, diversity and corporate social responsibility (CSR) is worldwide, and global marketers report that their brands place significant emphasis on them. While considered important globally, the importance is higher in Latin America and less important in EMEA and APAC.

Sports fans are particularly interested in purpose-driven marketing campaigns, and that affinity has delivered for brands that lean in. Across 15 MMM studies between 2017 and 2020 in France, for example, 30% of the purpose-driven campaigns increased short-term sales by 50%. Longer term, they improved sales between 1.2x and 3x.

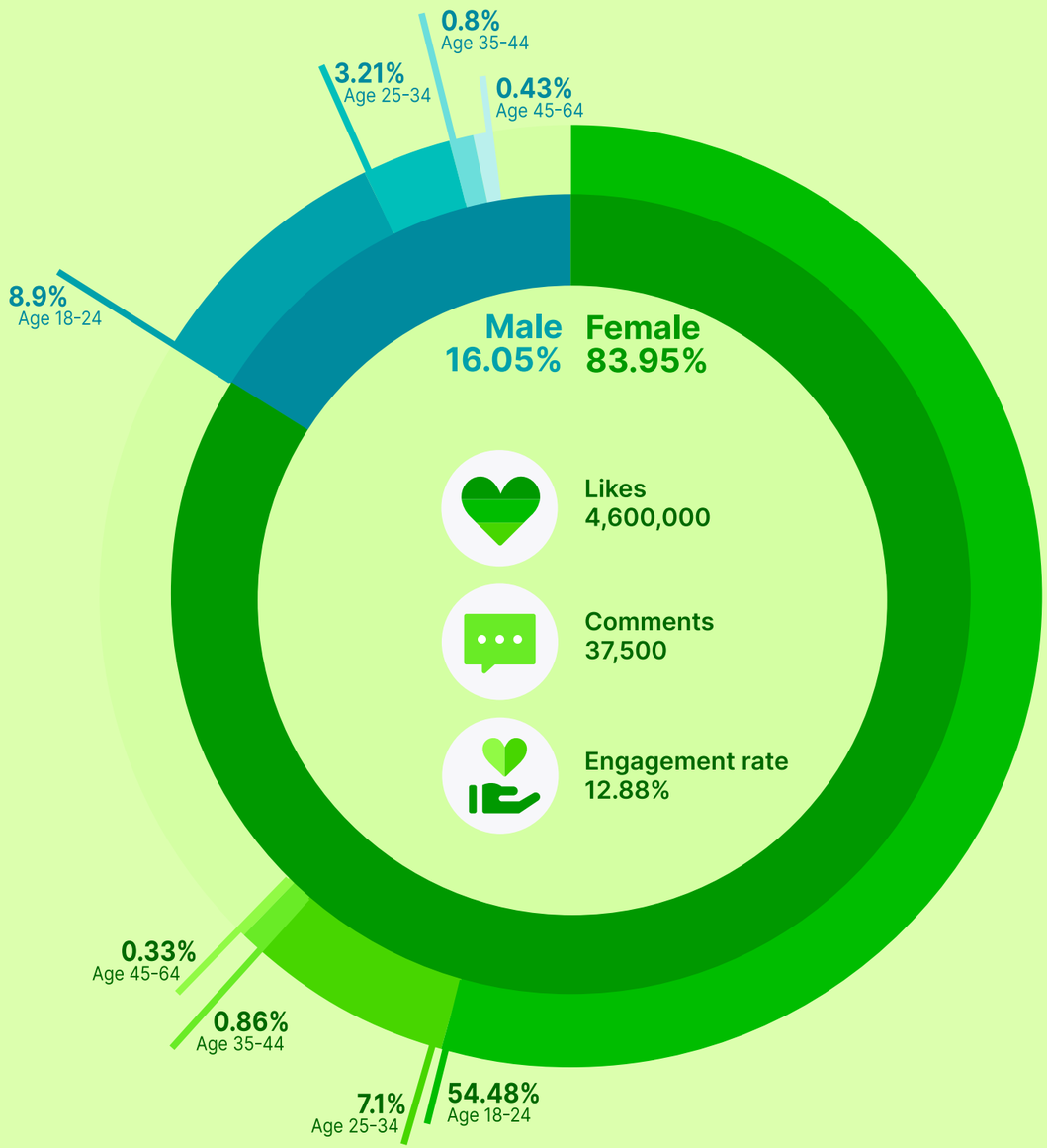
Amid their desire for purpose-driven brands, however, 55% of consumers aren't convinced that brands are contributing to real progress[7].

> ***"In France, 30% of purpose-driven campaigns across 15 MMM studies boosted short-term sales by 50%"***

In addition to establishing and fortifying their brand purposes, marketers should be thinking about how to evangelize them, such as through influencer marketing. While influencer marketing wasn't born out of the pandemic, social circumstances over the past two years have fostered a stronger need for interpersonal connection among consumers, and many brands have followed suit.

California-based e.l.f. Cosmetics, for example, amplified its own organic efforts last year with campaigns on TiKTok as a means to engage Gen Z consumers. Understanding the influence of music among Gen Z, the brand developed its own song, "Eye, Lips, Face," which it used as the foundation for a TikTok campaign that garnered 1 billion views in just six days, according to Nielsen InfluenceScope, a solution suite that measures social media influencers. The song was the first piece of branded content to hit No. 1 on TikTok's organic trends list and continues to engage, with more than 6 billion views to date and more than 5 million user-generated videos created as part of the campaign's associated challenge.

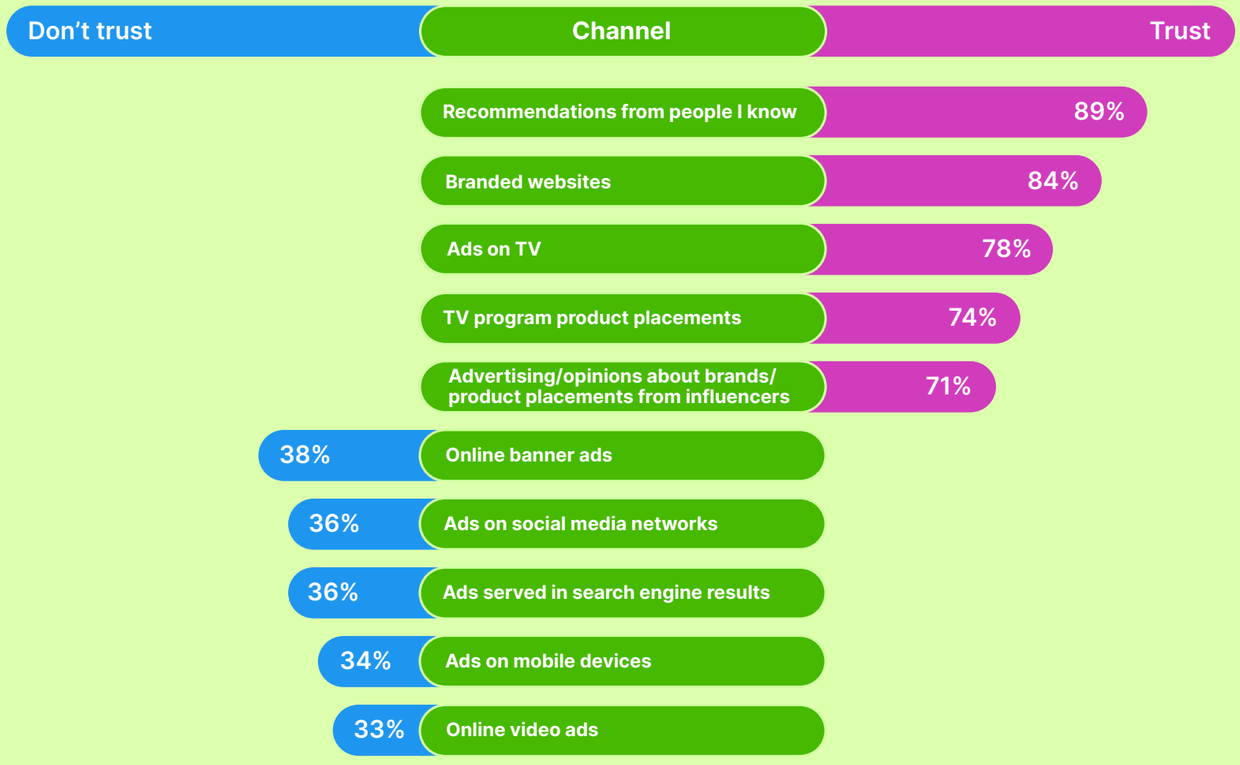
#eyeslipsface TIKTOK campaign snapshot



Source: Nielsen InfluenceScope

[7] Nielsen Fan Insights, July 2021; Australia, Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, U.K., U.S.

Marketing channel and consumer trust



Source: Nielsen 2021 Trust in Advertising study

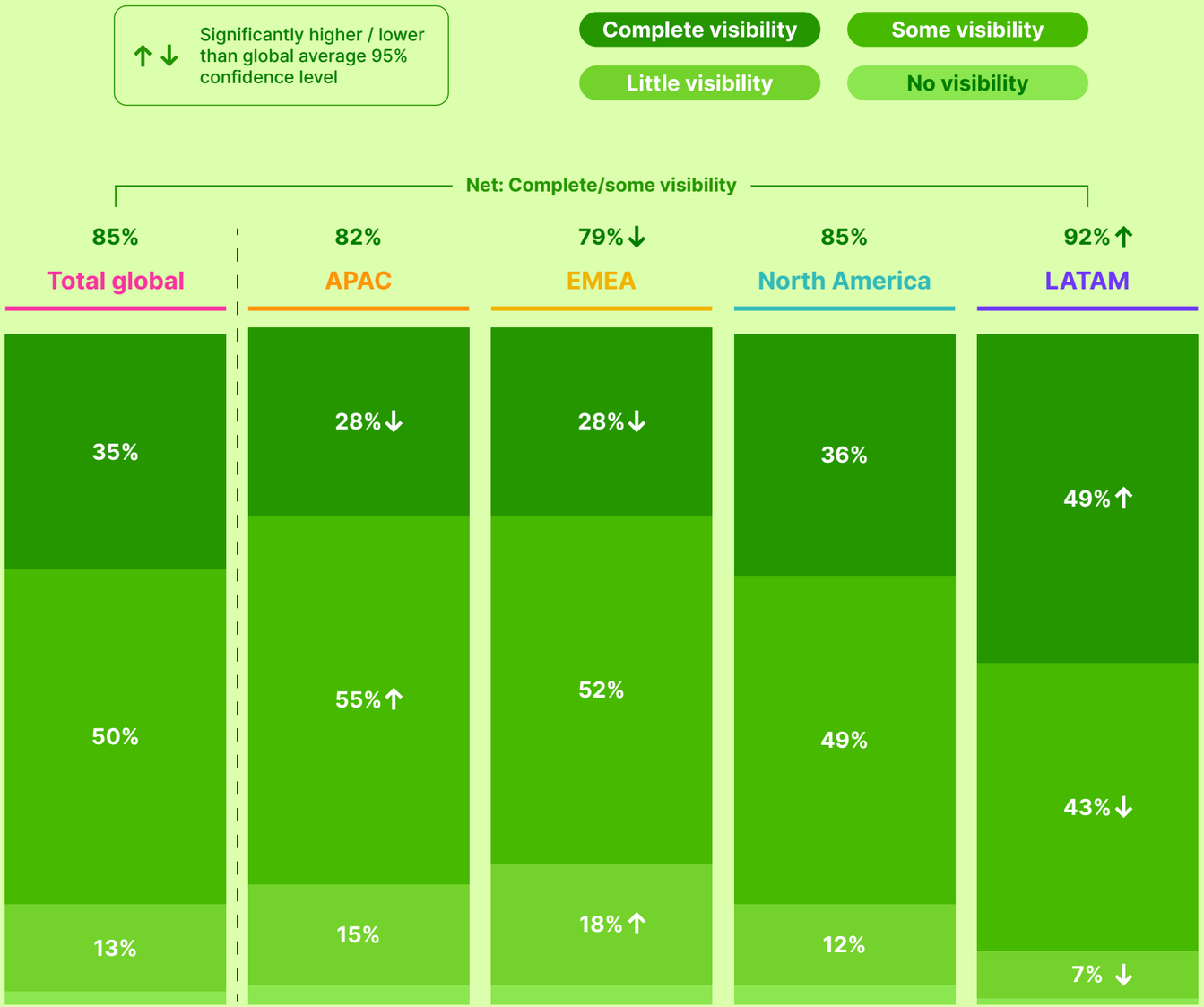
In addition to amplifying brand exposure and engagement with new audiences, influencer marketing ranks high among global consumers as a trustworthy marketing channel. Comparatively, many of the channels marketers plan to leverage more heavily in the coming year are less trusted by consumers globally.

And just as brands should be focused on what they stand for and use that as a springboard for their owned marketing initiatives, they should be simultaneously aware of the context in which their ads are viewed. For example, the negative rhetoric against China as the source of the COVID-19 virus sparked significant hate speech online during the early phases of the pandemic. Amid that rise, however, advertising remained largely business-as-usual, placing brands at risk of being associated with hate speech simply because of ad placement.

In an analysis last year, Nielsen identified 1,280 URLs that included Asian hate speech, 20% of which were published in 2021. In the first quarter alone, the analysis identified 250 ad campaigns that ran on URLs where brands were adjacent to content that featured the use of racist, disparaging, stigmatizing, and xenophobic terminology and conspiracies related to coronavirus origins, Asians and China. According to Nielsen Ad Intel, media companies spent $29.7 million on ads in those campaigns.

Examples like these highlight the evolving scope of modern marketing considerations. Among the marketers surveyed for this year's report, however, the overwhelming majority believe they have at least some visibility into the content adjacent to their advertisements.

Global visibility into ad content placement is high



Percentages represent responses to this question: How much visibility, if any, do you have into the diversity/representation of content in which your ads are appearing?
Note: The data may not sum to 100% due to rounding. Percentages below 3% not shown.

Consumers around the world are standing up and demanding accountability from businesses to take action—beyond corporate social responsibility. For advertisers, **brand safety is about more than a stagnant list of terms.** It's also a team sport, and marketers should be working with their brand safety partners, publishers and ad tech providers to gain greater visibility into ad placement options. Continued vigilance among all parties will both meet consumer demands and help marketers from inadvertently tarnishing their brands.

It goes without saying that consumers will not universally be returning to their pre-COVID lifestyles in the foreseeable future. While some markets have a clearer path to a more recovered state, the pandemic remains a notable consideration, and businesses will need to remain agile in their adaptability—just as consumers will.

The past two years highlight that adaptability, as consumer behavior has significantly accelerated the converging of our linear and digital lives. As that convergence continues, well-defined data strategies will help marketers engage in meaningful, personalized ways that foster long-term growth and prosperity.

Key recommendations for marketers

Make a promise to consumers

Be the brand that consumers want to buy from.
Choice, fragmentation and access have essentially leveled the playing field for any and all brands. When marketers echo what consumers are looking for in the brands they buy, they can foster more meaningful, long-term relationships with their customers.

Leverage the power of influencers to evangelize your brand.
Social media influencers help develop stronger interpersonal relationships with consumers, especially over the past two years. In addition to growing as a way for marketers to amplify their brands, social influencers are viewed as a trustworthy marketing channel among consumers.

Champion brand safety.
Collaborate with brand safety partners (publishers and adtech providers) to remain vigilant and ensure that messaging is meeting consumer demands and appearing in the places that consumers expect it to.

About this report

This is the fifth annual marketing report Nielsen has produced. The report leverages survey responses of marketers across a variety of industries whose focus pertains to media, technology and measurement strategies. This is the first time we fielded an international survey. Previous reports only include survey responses from marketers in the U.S. For this report, we engaged 1,943 global marketing professionals who completed an online survey between Dec. 2, 2021, and Jan. 12, 2022.

In terms of seniority level, we engaged global brand marketers at or above the manager level. These managers work with annual marketing budgets of $1 million or more across the auto, financial services, FMCG, technology, health care, pharmaceuticals, travel, tourism and retail industries.

Here are the corresponding sample distributions by region. Please keep these sample sizes in mind when reading and interpreting the charts in this report.

Respondents by Region
APAC: 510 respondents
EMEA: 464 respondents
North America: 531 respondents
Latin America: 438 respondents

TOTAL: 1,943

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics.

Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

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