

FORRESTER®



# The Workday Consumer Has Logged In

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## Executive Summary

In the anywhere-work world, the boundaries between work and personal life have blurred.<sup>1</sup> In the physical world, it's now common to find work files on kitchen counters, use guest rooms as makeshift workspaces, and take conference calls from the garden. The boundaries online have also blurred, and many people switch back and forth between employee mode and consumer mode during work hours.

Spurred on by the impact of the COVID-19 pandemic, consumers have forged new habits and preferences. Brands rushed to adapt their marketing and advertising strategies, and they found their pre-pandemic tactics and underlying assumptions about buyer personas are no longer fit for purpose.

In November 2021, Microsoft commissioned Forrester Consulting to evaluate the consumer behaviors emerging from the collision of work and personal lives, and how well brands have adapted their online advertising strategies. Forrester conducted an online survey of 5,329 employed adult consumers who made an online purchase via PC in the previous six months, and a survey of 1,301 directors, VPs, and heads of marketing or advertising at brands around the world.

We found that the blending of work and personal life has fueled the rise of the Workday Consumer. However, brands have not yet acted on this opportunity because of outdated consumer persona strategies and challenges around driving decisions with customer data insights while balancing privacy requirements and personalization. Although brands are steering their online advertising toward consumer expectations, they must update their persona-design assumptions and rethink their online targeting strategies to attract, convert, and retain the Workday Consumer and other emerging personas.



## Key Findings

### **The Workday Consumer seeks high-consideration purchases.**

Nearly two-thirds (62%) of consumer respondents said they regularly research or purchase products and services during worktime, and more than half (51%) said the number of online purchases they make during their worktime has increased since the beginning of the pandemic. Purchases made during worktime tend to be in high-consideration categories such as travel, finance, and home improvement tools and appliances.

**Brands have yet to seize the opportunity around Workday Consumers.** Surveyed marketing and advertising leaders are not confident in their brands' abilities to create in-depth target personas and to use the right mix of digital advertising tactics for each. Brands rely on outdated approaches to customer personas that focus on demographics and purchasing histories and rarely consider more nuanced cues. They also struggle to convert customer data into actionable insights that drive online advertising strategies.

**Brands plan to upgrade capabilities and budgets for online advertising to align with consumer expectations.** Brands plan to adapt to consumer expectations for relevant content and seamless online experiences by upgrading skills and tools and increasing budgets. Brand respondents said social (81%), search (75%), online video (61%) and online display (58%) have become more important for their company's online advertising strategies. They plan to increase budgets in these areas and expand the range of search engines and demand-side platforms their brands engage.



## Say Hello To The Workday Consumer

While work and personal lives were increasingly moving online during the last decade, the pandemic provided rocket fuel for this shift. The mass move to remote working spawned the anywhere-work world, and companies are now under pressure to provide technology, culture, and leadership that their employees need to work from anywhere.<sup>2</sup> For consumers, the pandemic rapidly accelerated expectations and the necessity for digital delivery of products and services from everyday groceries to healthcare, which forced brands to light a fire under their digital transformation efforts.

In surveying more than 5,200 employed online consumers who made an online PC purchase during the previous six months, we found that 14% of respondents worked from home before the pandemic, 68% did so during the initial waves of lockdowns in early 2020, and 48% do so now. Around a quarter said they expect to continue working remotely for at least the next 12 months, if not permanently in the future. The introduction of work lives into personal spaces has fueled a wave of behavior changes and new preferences. Respondents said they:

- **Blend their work and personal lives.** Sixty percent of consumer respondents said they typically mix work and personal tasks in their worktime to-do lists (see Figure 1). And nearly 60% said they consider work and personal tasks to be of equal importance during their worktime. Factors driving this include convenience and needing to take breaks from work.
- **Use work devices for personal purposes.** Nearly two-thirds of consumer respondents (63%) said they spend more time on their work PC than they did before the pandemic, and 56% admitted they use work tools (e.g., laptops and videoconferencing software) for personal purposes. Around half (48%) said they prefer not to switch devices when doing personal tasks during worktime.
- **Spend more worktime on personal tasks since the pandemic.** Nearly half of consumer respondents (45%) said the time they spend on personal tasks during worktime has increased since the pandemic

started. Around 40% spend an hour or more on personal tasks during the worktime, and 10% spend three or more hours. Assuming there are 8 to 10 hours of worktime in the average day, this suggests that one in 10 consumers in this study spends between one third and half of their worktime on personal tasks.

**Figure 1**

**CONSUMERS**

**“To what extent do you agree or disagree with the following statements?”**

● Strongly agree ● Agree

I spend more time on my work PC (desktop or laptop) than I did before the pandemic.



I typically have a mix of work and personal tasks in my to-do list during my worktime.



My personal tasks (e.g., paying bills) and work tasks (e.g., client calls) are of equal importance during my worktime.



I use my work tools (e.g., work laptop, video conferencing) for personal tasks.



I do personal tasks during my worktime because it gives me a short break from work.



I balance family and home management (e.g., childcare, cooking, laundry, meal prep) alongside my work tasks during the day.



I prefer not to switch devices when doing personal tasks during my worktime.



I do personal tasks during my worktime because it is convenient.



Base: 5,329 employed consumers aged 18+ who made online purchases via a PC during the previous six months  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

# ENTER THE WORKDAY CONSUMER, A RESULT OF THE WORK/ PERSONAL LIFE COLLISION

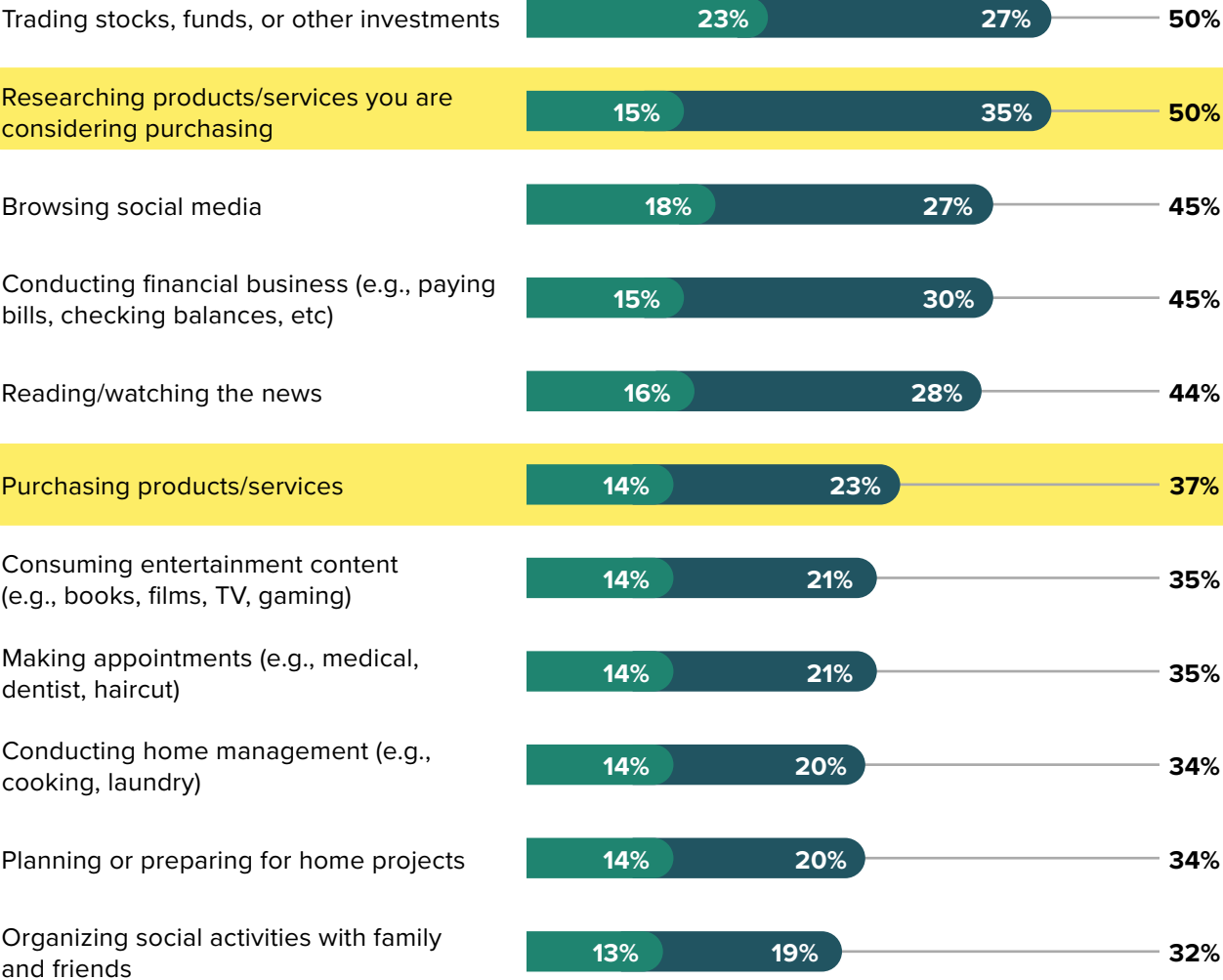
The Workday Consumer spends time during their work hours researching or purchasing products and services, along with performing personal tasks such as doing household chores, managing finances, and consuming entertainment. Nearly two-thirds of consumer respondents (62%) are in this category because they regularly research or purchase products and services during their worktime. Respondents noted they:

**Figure 2**

**CONSUMERS**

**“How often do you do the following tasks during your worktime?”**

● Always ● Often



Base: 5,329 employed consumers aged 18+ who made online purchases via a PC during the previous six months  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

- **Scroll potential purchases more often than social media channels.** Alongside trading stocks and funds, 50% of respondents said they regularly research products and services they're thinking about purchasing during worktime, whereas 45% said they regularly browse social media (see Figure 2).
- **Expect to do more buying in between work tasks in the future.** The pandemic spurred a growth in the Workday Consumer segment that is set to continue. More than half of consumer respondents (51%) stated the amount of online purchases they make during worktime increased with the pandemic, and 44% expect this to continue to increase during the next 12 months (see Figure 3).

**WORKDAY CONSUMERS SEEK HIGH-CONSIDERATION PURCHASES, AND THEIR JOURNEYS COVER PC TOUCHPOINTS**

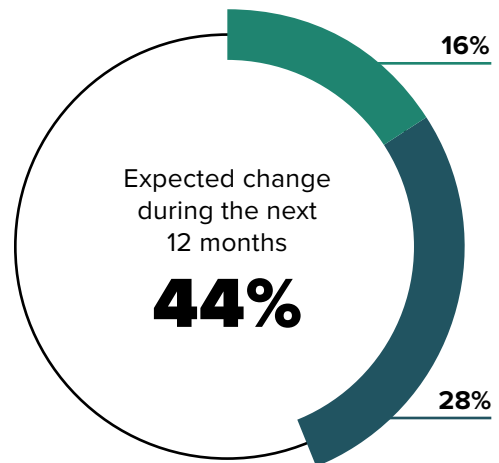
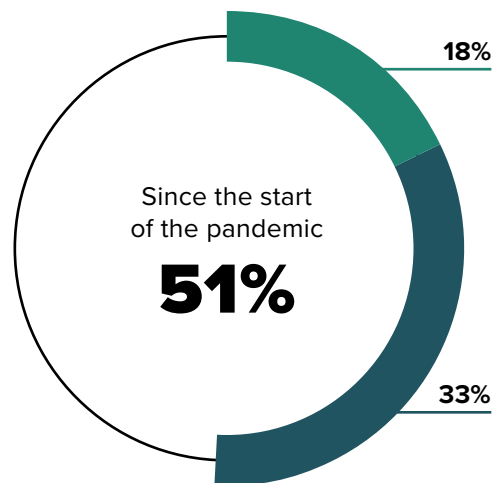
Our survey findings show the Workday Consumer seeks high-consideration and complex purchases, and PC is a key touchpoint in their journeys. Forrester predicts that despite the rapid growth of mobile commerce, 56% of online retail sales will occur via PC in 2024.<sup>3</sup> While 76% of all respondents in our study said they use a mix of devices (e.g., mobile, tablet, PC) when researching and buying products/services online, their overall device preferences for high-consideration, complex purchases suggest the Workday Consumer may prefer using a PC. These findings indicate that many Workday Consumers are:

- **Travel hunters.** Travel items top the list of things consumer respondents research or purchase during the worktime (see Figure 4).

Figure 3

**Online Purchases Made During Worktime**

- Increased significantly
- Increased slightly



Base: 5,329 employed consumers aged 18+ who made online purchases via a PC during the previous six months  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021



They also top the list of items that respondents research (66%) and/or purchase (64%) on their work or personal PC (see Figure 5). Nearly 70% of respondents in Australia said they prefer to research travel on PC.

- **Financial planners.** Financial products and services are also in the top 10 categories that consumer respondents research and purchase during the worktime (see Figure 4). And 62% said they they prefer to purchase financial products and services on PC (see Figure 5). This number is slightly higher in France (65%) and Australia (66%).
- **Home improvers.** Tools/hardware/garden supplies, electronics, and home appliances all appear in the top 10 categories of items that consumer respondents research and purchase during their worktime (see Figure 4). Sixty percent said they prefer to purchase tools/hardware/garden supplies on a PC (see Figure 5). This number is higher in Germany (66%) and Australia (67%).
- **Leisure seekers.** Sporting goods and media/entertainment (e.g., streaming services, online games) are in the top 10 categories that respondents research or purchase during worktime. More than a third of consumer respondents in Canada and the United Kingdom (36%) said they purchase media and entertainment during worktime.

Because the research phase of the buying journey spans everything from initial searching to product exploration, PC offers a breadth of touchpoints for reaching Workday Consumers — particularly around travel, home improvement, and financial services and products.

### **The Workday Consumer is here to stay:**

44% of respondents expect the number of online purchases they make during worktime to increase during the next 12 months.



Figure 4

“When do you usually research (i.e., discover and explore products/services before buying) the following? When do you usually purchase the following?”



Base: 5,329 employed consumers aged 18+ who made online purchases via a PC during the previous six months

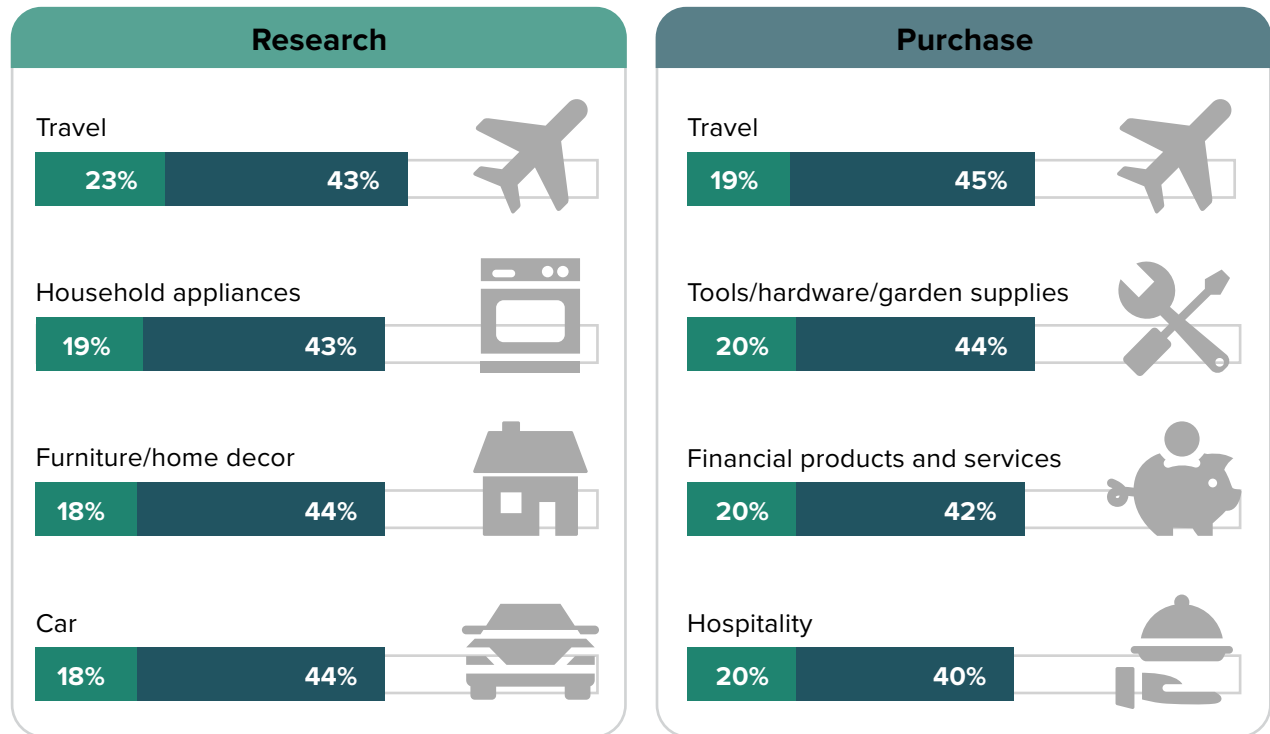
Note: Showing top 10 responses for “During my worktime.”

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

Figure 5

“What is your preferred device on which to research (i.e., discover and explore products/services before buying) the following? What is your preferred device on which to purchase the following?”

- Work PC (desktop or laptop)
- Personal PC (desktop or laptop)



Base: 5,329 employed consumers aged 18+ who made online purchases via a PC during the previous six months

Note: Showing top responses for “Work PC” and “Personal PC.”

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

## Advertisers Are Missing Out On The Opportunity

Marketers at brands know that new consumer behaviors should prompt them to change their online advertising strategies. Along with changes in business priorities due to the pandemic (78%), changes in consumer behaviors (77%) top of the list of brand respondents' most important factors affecting online marketing and advertising strategies during the next 12 months. However, respondents have mixed confidence in their organizations' abilities to adapt to the needs of new and emerging personas (see Figure 6). Decision-makers are not confident their brands are able to:

- **Build in-depth understandings of different personas.** Respondents are the least confident in their brands' abilities to develop in-depth target personas compared to other aspects of online advertising. More than two-thirds rated their brands as intermediates or novices in this area, and only a third consider their companies to be experts.
- **Use the right mix of digital advertising tactics for each persona.** With regard to using the right combination of digital advertising tactics for customer personas, half of respondents rated their brand as an intermediate and 7% rated their brand as a novice. This is not surprising because they struggle with step one, which is to decipher different personas.

Consumer behavior changes are one of the **most important factors** for marketing and advertising strategies during the next 12 months.



### BRANDS ARE STUCK USING OUTDATED CONSUMER PERSONA STRATEGIES

Marketers and advertisers need more than the standard demographic and attitudinal characteristics to truly connect with buyers at the human level; they must understand the emotions that drive buyers' decision-making.<sup>4</sup> Yet our study indicates that most brands still mostly lean on traditional factors such as demographics, device and channel preferences, and behavior history when defining target consumer segments.

Brand respondents indicated their companies do not prioritize more nuanced cues like where and how consumers work online, or what kind of tasks they are undertaking, or what mindset they are in. And all of that would help identify emerging segments like the Workday Consumer and the emotions that drive their buying decisions. When defining target consumer segments, brands rarely consider the consumer’s working mode,

**BRANDS**

**Figure 6**

**“How would you describe your organization's maturity with regard to the following aspects of online advertising?”**

- Expert
- Intermediate
- Novice

Understanding the customers' purchasing journeys across digital channels (e.g., in-store, website, third-party sites, social media)



Developing personalised and relevant advertising content based on customer preferences



Attributing purchases to digital advertising campaigns or tactics



Understanding customer preferences (e.g., purchase channels, devices, etc.)



Evolving digital advertising strategies based on changes in consumer behaviour and preferences



Targeting online ads at the right moments and channels throughout the customers' purchasing journeys



Connecting data sources (e.g. CRM, transactional data, behavioural data, interaction data, third-party data) across customer journeys to create a unified/single view of the customer



Using the right combination of digital advertising tactics (e.g. search, social, display, video) for each customer persona



Developing in-depth target customer personas using a range of characteristics (e.g. demographic, work mode, mindset, values, and preferences)



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

such as if they are desk-based or frontline and office-based or remote, or their mindset or activities, like whether they are in the middle of performing productive tasks or leisure time.

This varies by region, and APAC brands are much less focused on working mode than other regions, and North American brands largely ignore mindset or activity (see Figure 7). EMEA brands appear ahead of the curve in considering mindset or activities.

But factors such as working mode and mindset are difficult to measure just through online behavior. Nuanced cues such as working mode, mindset, or activity often compound characteristics based on other measures such as demographics and purchasing times. For example, a high-income professional who is researching DIY tools at midday on a Thursday may be in more of a task-completion mindset than a frontline retail employee browsing vacation destinations on mobile after their shift. Measurable characteristics like demographics, online behavior, and purchasing times hold the clues to help deduct these more nuanced cues.

## **BRANDS FACE CHALLENGES WITH INSIGHT-LED DECISIONING AND DATA PRIVACY REQUIREMENTS**

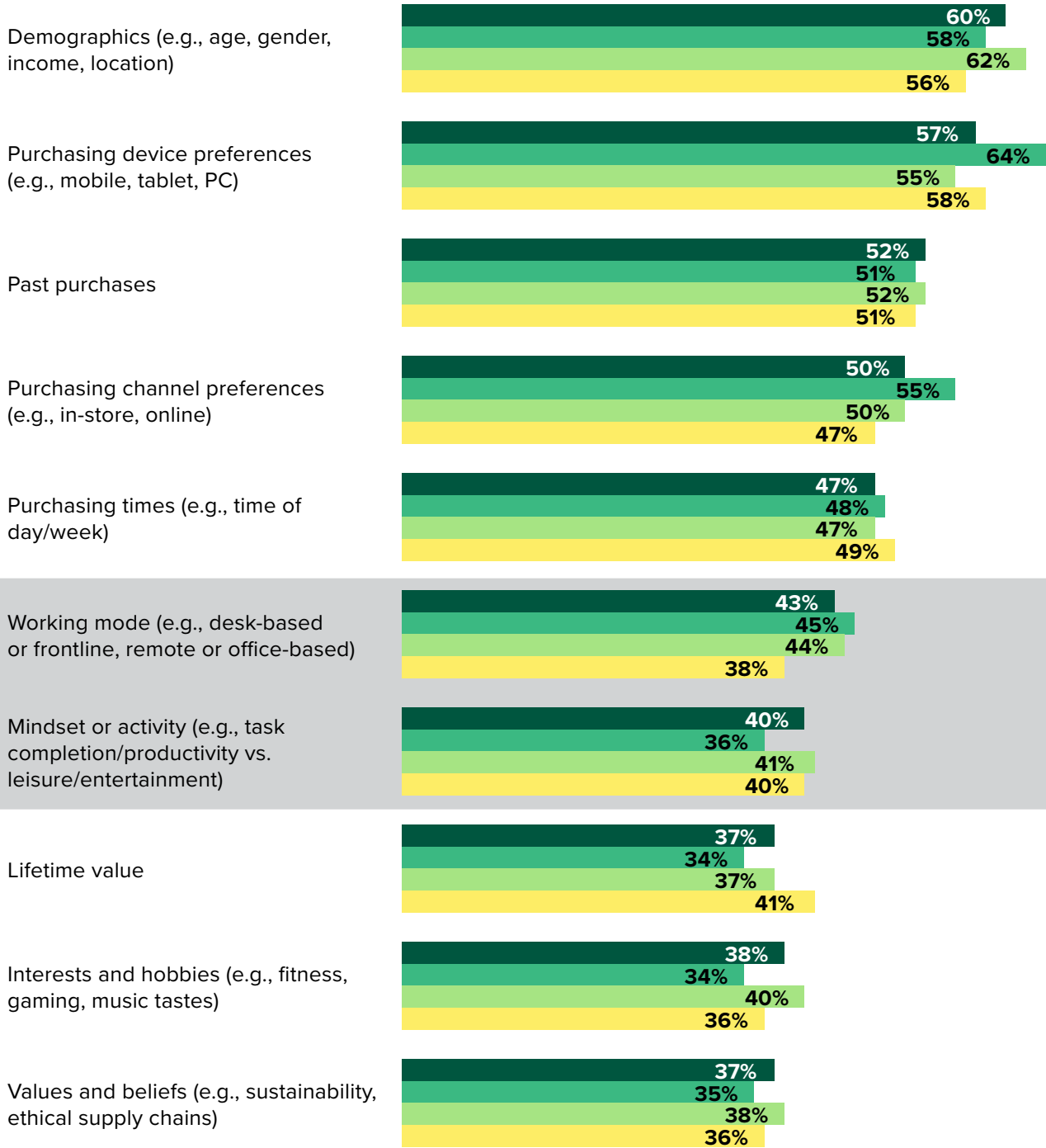
Data and insights challenges pose a key barrier that may be limiting the ability of brands to define, understand, and target new and emerging personas like the Workday Consumer. Brand respondents said their companies:

- **Struggle to make insights-driven advertising decisions.** Many brand respondents said their company is unable to get what it needs from customer data to fuel online advertising strategies that are informed by insights. Brand respondents said driving decision-making with customer insights was the top challenge with online advertising (see Figure 8). Many said their brand struggles to even gain any actionable insights from its customer data, such as what channels focus online ad spend to make the greatest impact with key personas.
- **Wrestle with privacy vs. personalization.** When digging into data challenges, we found that balancing data privacy requirements with personalization was top of mind for brand respondents, along with creating a single view of their customers, future-proofing

Figure 7

“Which of the following consumer characteristics does your organization use to define target consumer segments?”

● Total ● North America ● EMEA ● APAC



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

their organizations' data and insights strategies, and personalizing experiences across channels. The decline of the third-party cookie and changes in mobile ad IDs fundamentally altered brands' abilities to create and target audiences online and further exacerbated this challenge.<sup>5</sup>

**Figure 8**

**“What strategic challenges does your organization face with online advertising?”**

Driving decision-making with customer insights



Attributing marketing performance to individual programs, campaigns, or channels



Determining the most valuable channels on which to focus ad spend



Deriving actionable insights from customer data



Coordinating different marketing service providers (e.g., agencies)



**“What data challenges does your organization face with online advertising?”**

Balancing data privacy requirements and expectations with the right level of personalization



Creating a single view of the customer with other marketing channels



Future-proofing our use of data and insights to account for changes such as privacy regulation and removal of third-party cookies



Lack of access to real-time data



Personalizing experiences across channels



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC

Note: Showing top 5 results.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021



## Brands Plan To Steer Online Advertising Toward Consumer Expectations

Challenges with online advertising will continue to change, and new ones are likely to emerge through regulatory changes or market shifts. But the emergence of the Workday Consumer creates a strong imperative on brands to tackle challenges and capitalize on these new opportunities. Enhancing data and analytics capabilities to define, understand, and target new consumer personas is half of the equation, along with evolving online advertising strategies to align with macro consumer trends and segment-level behaviors such as those of the Workday Consumer. According to our study, brands are (see Figure 9):

- **Adapting online advertising strategies to deliver relevant content and seamless experiences across channels.** When asked which consumer trends their brands will prioritize with new or updated online advertising tactics during the next 12 months, decision-makers said the top three are consumer expectations for seamless online experiences, preference for relevant content, and purchase journeys that combine channels.
- **Paying attention to the Workday Consumer.** Some brands are starting to recognize the behaviors attributed to the Workday Consumer are important. More than two-fifths of brand respondents said their company prioritizes the mix of work and personal tasks during worktime and purchase journeys that take place during worktimes. And just less than half said they recognize the importance of purchase journeys that combine work or personal devices.

Brand respondents said 58% of their company's paid media budgets went to digital channels pre-pandemic, and that this is set to rise to 70% during the next 12 months.

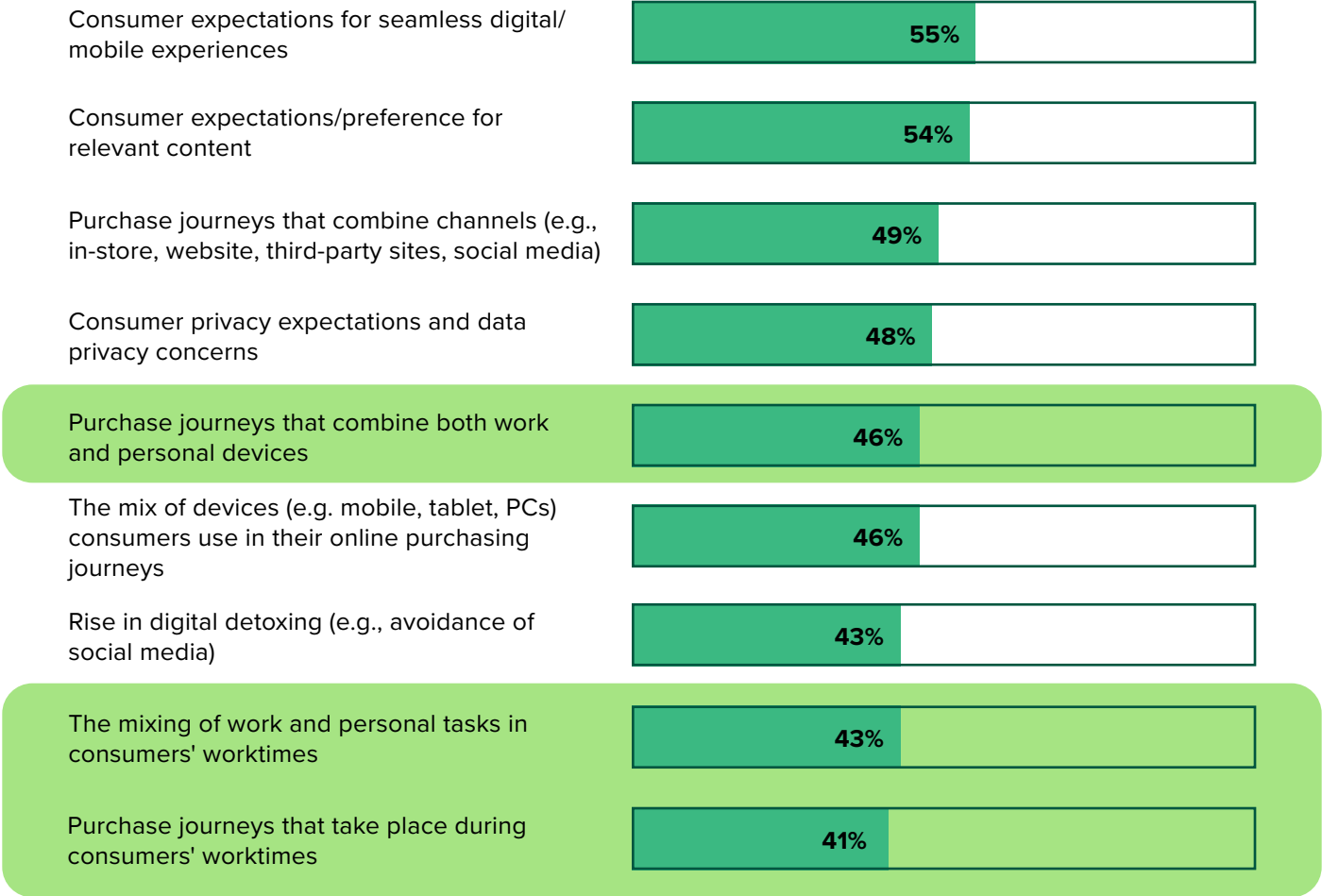
# 75%

of brand respondents said search became more important for their company's online advertising strategies due to consumer trends.



**Figure 9**

**“Please select the top five consumer trends your organization will prioritise with new or updated online advertising strategies/tactics over the next 12 months.”**



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC  
 Note: Showing top responses.  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

**BRANDS SEEK TO UPGRADE CAPABILITIES, BUDGETS, AND DIGITAL CHANNELS TO ADAPT TO CONSUMER TRENDS**

As they recognize the importance of consumer trends (e.g., the need for seamless digital experiences, preferences for relevant content, channel-hopping purchase journeys, the blending of work and personal lives), brands are investing in upgrading their skills and tools and evolving their mixes of online advertising tactics. Brand respondents said their companies plan to:

- **Build specialist capabilities and tools.** To handle shifts in consumer behaviors, brands plan to hire more specialist skills in marketing (57%) and upgrade tools and technology (49%) (see Figure 10). Recognizing the need to provide seamless digital experiences for consumers across channels, they also plan to improve capabilities to create integrated campaigns across systems of touchpoints including social, search, native, and digital out-of-home (OOH).
- **Boost budgets for digital channels.** The mass migration to digital channels is permanent in many ways, and it's reflected in brands' redistribution of paid media budgets.<sup>6</sup> They are redirecting ad budgets from traditional channels such as TV, print, and OOH to digital channels including search, social, online video, and online display. Although 58% of total paid media budget went to digital pre-pandemic, this is set to rise to 70% during the next 12 months, while the portion going to traditional media will fall to 30%.
- **Emphasize social, search, online video, and online display.** The mix of advertising tools and tactics that are important to tackle consumer trends have shifted. Brand respondents reported that social (81%), search (75%), online video (61%) and online display (58%) have all become more important for their company's online advertising strategies (see Figure 11).

# 60%

of brand respondents said their company plans to increase advertising budget for search, online video, and online display during the next 12 months.

Figure 10

**“What online advertising strategies/tactics is your organization planning to implement to adapt to the consumer trends you selected above?”**

● Planning to implement

Hiring more specialist skills in marketing department (e.g., CX, UX, analytics, media or tech strategy)



Upgrading tools and technology to handle shifts in consumer behaviour and our marketing needs



Embedding a range of martech (e.g., eCommerce, digital transformation, CX, UX) in core practices and outputs



Creating integrated campaigns across a system of touchpoints (e.g., social, search, native, digital out-of-home, broadcast)



Hiring more specialist agencies



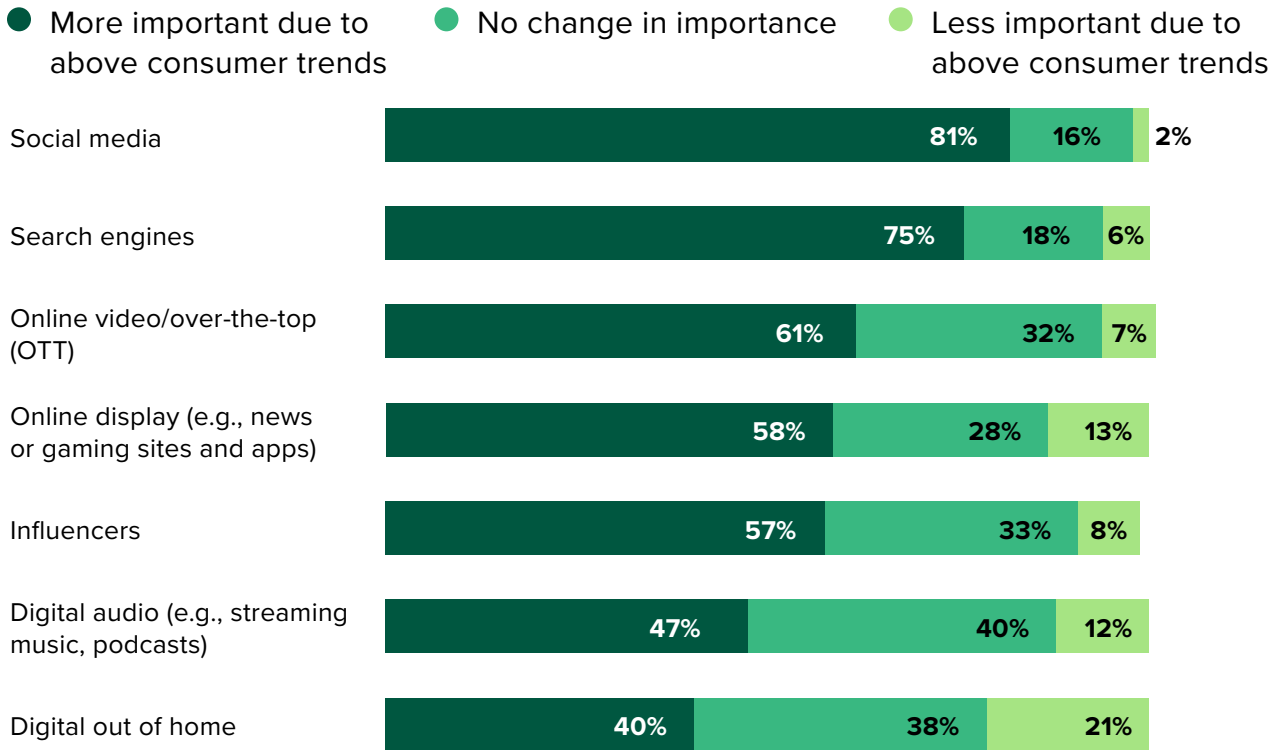
Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC

Note: Showing top 5 responses.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

Figure 11

“How has the importance of the following online advertising tactics changed for your organization due to the consumer trends you selected above?”



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC

Note: Showing top responses.

Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

### BRANDS PLAN TO INCREASE AD SPEND ACROSS KEY CHANNELS AND DIVERSIFY SEARCH AND DISPLAY PLATFORMS

Previous Forrester research showed that during earlier stages of the pandemic, online user demand surged but advertiser demand lagged.<sup>7</sup> Now, as online usage remains strong and online retail growth is sustained, advertiser demand is returning and set to grow. Our study supports with these findings, and reveals that brands are aligning budgets with digital channels that have grown in importance due to consumer trends. Respondents said their brands plan to:

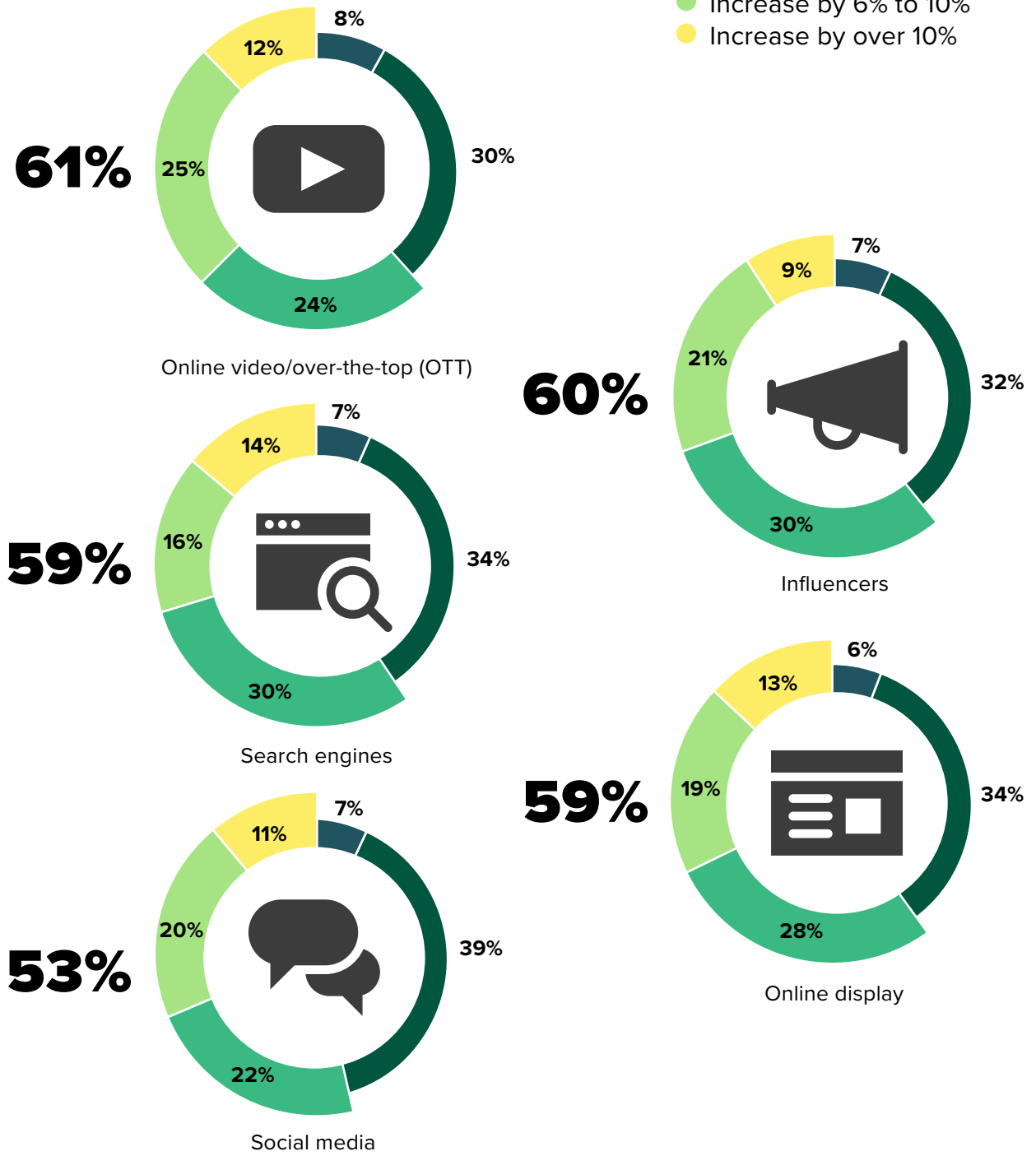
- **Spend more on ads:** Around 60% of respondents said their brand plans to increase media ad budgets for online video, search, and online display during the next 12 months (see Figure 12). Most are

Figure 12

**BRANDS**

“How do you expect your organization’s media advertising budget across the following to change over the next 12 months?”

- Decrease
- Stay the same
- Increase by 1% to 5%
- Increase by 6% to 10%
- Increase by over 10%



Base: 1,301 marketing and digital advertising decision-makers at companies in North America, Europe, and APAC  
 Note: Percentages may not total 100 due to rounding.  
 Source: A commissioned study conducted by Forrester Consulting on behalf of Microsoft, November 2021

taking an influencer-focused approach with increasing ad spend across social media rather than owned social accounts. Some of the biggest increases are going into search advertising: One in six brand respondents said their brand intends to increase its budget for search ads by over 10%.

- **Diversify where they buy ads:** Ninety-two percent of brand respondents said their company advertises on two or more search engines, and 82% said their company engages two or more demand-side platforms (DSPs). And this is set to expand. Eighty-eight percent of respondents said their brand plans to advertise on three or more search engines during the next 12 months, and 77% plan to engage three or more demand-side platforms.

By diversifying where brands buy ads across search engines and DSPs, respondents said they expect a range of benefits for their brands like improving customer experience, improving customer satisfaction and loyalty, and gaining the ability to understand and target new and emerging consumer personas.



## Key Recommendations

As the emergence of the Workday Consumer shows, consumer behavior and preferences continually evolve in response to short-term to midterm disruptions such as the pandemic and long-term trends such as hybrid working. Brands must adapt online marketing and advertising strategies to account for these shifts and prepare for future ones.

Forrester Consulting's detailed surveys of consumers who made a PC purchase in the previous six months and marketing and advertising leaders at brands yielded several important recommendations for brands:

### **Refine target consumer personas to account for working mode and mindset.**

It's no longer sufficient to define target consumer personas based on demographics and past behaviors. Brands must consider more nuanced cues such as working mode (e.g., desk-based or frontline, office-based or remote), mindset, activity, and emotion to understand and target Workday Consumers. Use existing demographic and digital-behavior analytics to deduce these cues and employ methods such as self-reported studies, observational studies, location tracking, and time-of-day data. Beyond planning for the Workday Consumer, develop other nuanced target segments by infusing emotion data into personas. Understand the facets of emotions including feelings, neurophysiology, social-expression, and behaviors along with the observable traits for each and the software that can help measure them.<sup>8</sup>

### **Optimize content and ads for search and native campaigns on PC.**

Despite the growth of mobile, 56% of online retail sales will occur via PC in 2024.<sup>9</sup> Our study found that PC is a key touchpoint for Workday Consumers, and we know that display and search advertising remain key channels for reaching PC users.<sup>10,11</sup> To attract, convert, and retain Workday Consumers, it's important to craft messaging, content, and ads that are optimized for PC search and native. This is particularly important for upper-funnel campaigns because Workday Consumers actively research products and services in between work tasks.

**Rethink targeting strategies to balance personalization and privacy requirements.**

Balancing privacy requirements and effective personalization is a major challenge for brands due to increased regulations (e.g., General Data Protection Regulation), consumers who increasingly guard their privacy online, and ever-growing examples of too much personalization that erodes trust. To tackle this, rethink targeting strategies through the lens of customer value. First, ask your customers what they value along four dimensions of functional, experiential, economic, and symbolic areas, then understand what personalization customers want and do not want through primary research, testing, and analytics.<sup>12</sup>

**Prepare to target new and emerging personas across their online purchasing journey by utilizing partner-provided insights.**

The decline of the third-party cookie and changes in mobile ad IDs fundamentally altered brands' abilities to create and target audiences online. Our study highlights that brands struggle with driving insight-led advertising decisions, and this will only be exacerbated due to these changes. As consumer behaviors continue to evolve and new personas emerge, look beyond identity-based targeting, and engage partners that enable targeting based on myriad digital signals like opted-in digital consumer tracking panels, contextual insights, time of day, and weather to predict audiences and performance.<sup>13</sup>



## Appendix A: Methodology

In this study, Forrester conducted a global online survey of 5,329 employed consumers who are 18 or older and who had made an online purchase via PC during the previous 6 months and another survey of 1,301 marketing and advertising decision-makers who are directors, VPs, or heads at brands. Questions in the consumer survey asked about working schedule changes, attitudes to personal tasks and purchasing during worktimes, and current and expected preferences for purchasing times and devices. Questions in the business survey focused on brands' online advertising strategies, the factors influencing strategies, and their current and planned advertising mixes. Respondents were offered a small incentive as a thank you for time spent on the survey. The study began and was completed in November 2021.

## Appendix B: Consumer Demographics

GEOGRAPHY	
Australia	522
Canada	547
France	532
Germany	532
India	538
Italy	531
Netherlands	527
Spain	531
UK	534
USA	545

AGE	
18 to 24	7%
25 to 34	24%
35 to 44	45%
45 to 54	20%
55 to 64	4%

GENDER	
Male	59%
Female	39%
Nonbinary, genderqueer, or gender nonconforming	2%

JOB TYPE	
Business function (e.g., HR, procurement, marketing, sales)	21%
Professional services (e.g., consulting, legal)	20%
General management (e.g., branch manager)	17%
Finance professional	13%
Engineer/researcher	10%
Other (e.g., healthcare, design, educator, government)	12%

LOCATION	
Large town or city	51%
Suburb near large city	22%
Small town or city	19%
Rural area	8%

EMPLOYMENT	
Employed full-time	78%
Employed part-time	13%
Self-employed	9%

<b>DEVICES USED FOR ONLINE PURCHASING</b>	
Work or personal PC (desktop or laptop)	<b>100%</b>
Work or personal mobile device	<b>84%</b>
Work or personal tablet	<b>29%</b>

<b>LAST ONLINE PURCHASE</b>	
This week	<b>34%</b>
Within the last month	<b>29%</b>
More than a month ago	<b>23%</b>
More than three months ago	<b>14%</b>
Engineer/researcher	<b>10%</b>
Other (e.g., healthcare, design, educator, government)	<b>12%</b>

## Appendix C: Brand Demographics

<b>GEOGRAPHY</b>	
Australia	<b>126</b>
Canada	<b>124</b>
France	<b>127</b>
Germany	<b>136</b>
India	<b>129</b>
Italy	<b>129</b>
The Netherlands	<b>128</b>
Spain	<b>123</b>
UK	<b>132</b>
USA	138

<b>INDUSTRY</b>	
Travel	<b>25%</b>
Retail	<b>25%</b>
Financial services	<b>25%</b>
Automotive/transport	<b>25%</b>

<b>JOB POSITION</b>	
Vice president/head	<b>35%</b>
Director	<b>65%</b>

<b>COMPANY SIZE</b>	
100 to 249 employees	<b>5%</b>
250 to 499 employees	<b>5%</b>
500 to 999 employees	<b>21%</b>
1,000 to 4999 employees	<b>33%</b>
5,000 to 19999 employees	<b>29%</b>
20,000 or more employees	<b>7%</b>

<b>JOB FUNCTION</b>	
Marketing	<b>54%</b>
Advertising/digital advertising	<b>46%</b>

## Appendix D: Supplemental Material

### RELATED FORRESTER RESEARCH

“The ROI Of SEO,” Forrester Research, Inc., November 19, 2020

“How The Future Of B2C Buying Will Impact Paid Search Strategies,” Forrester Research, Inc., September 30, 2020

## Appendix E: Endnotes

- <sup>1</sup> Source: “Predictions 2021: Employee Experience,” Forrester Research, Inc., October 29, 2020.
- <sup>2</sup> Source: “Use The Lessons Of 2020 To Create Your Anywhere-Work Strategy,” Forrester Research, Inc., November 17, 2020.
- <sup>3</sup> Source: “Forrester Analytics: Search Marketing Forecast, 2019 To 2024 (US),” Forrester Research, Inc., March 4, 2020.
- <sup>4</sup> Source: “The CMO’s Guide To Emotion,” Forrester Research, Inc., August 14, 2017.
- <sup>5</sup> Source: “The Future Of Audience Targeting,” Forrester Research, Inc., June 9, 2021.
- <sup>6</sup> Source: “Predictions 2022: Consumer,” Forrester Research, Inc., October 27, 2021.
- <sup>7</sup> Source: “Q3 2020 Digital Marketing Tracker, Global,” January 12, 2021.
- <sup>8</sup> Source: “The CMO’s Guide To Emotion,” Forrester Research, Inc., August 14, 2017.
- <sup>9</sup> Source: “Forrester Analytics: Search Marketing Forecast, 2019 To 2024 (US),” Forrester Research, Inc., March 4, 2020.
- <sup>10</sup> Source: “Forrester Analytics: Online Display Advertising Forecast, 2019 To 2023 (Europe),” Forrester Research, Inc., August 7, 2019.
- <sup>11</sup> Source: “Forrester Analytics: Search Marketing Forecast, 2019 To 2024 (US),” Forrester Research, Inc., March 4, 2020.
- <sup>12</sup> Source: “Marketers Versus Customers: Opposing Forces Erupt,” Forrester Research, Inc., January 20, 2021.
- <sup>13</sup> Source: “Predictions 2022: Media And Advertising,” Forrester Research, Inc., October 28, 2021.

A woman with blonde hair in a bun, wearing a blue sweater, is seen from behind, sitting at a wooden desk and working on a laptop. The scene is dimly lit, with a large indoor plant and a framed picture of a mountain landscape in the background. The word "FORRESTER" is overlaid in white serif font across the center of the image.

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