



# Market Out/Look book

We speak financial.

**ext.**

# Letter from our founders

2023 was a year of significant change in the financial services industry, with generative artificial intelligence (AI) emerging almost out of nowhere to capture our imaginations. This technological leap forward forced us to rethink the way we work, our processes, our risks and our bottom lines. One thing is certain: AI is a theme that will leave no industry untouched.

In this year's outlook, we take a sneak peek at AI and pinpoint some of the biggest challenges and opportunities that will shape our industry through 2024, including the growing importance of creating an "always on" brand, focusing on an engaging client experience (CX), championing accessibility, and more.

**Ext. Marketing is going through something of a brand transformation as well.** Over our 14-year journey, one thing has defined us: our deep knowledge of the financial services industry that allows our firm to bring new solutions to our clients as they move through their own growth journeys.

Our old tagline "Leading financial services marketing" still rings true as we continue to partner across the full financial spectrum to develop industry-leading content for our clients' B2B and B2B2C initiatives. But we've taken it up a notch.

Our new tagline, **"We speak financial."** capitalizes on our deep connection with the industry. We speak our clients' language. We listen, empathize and truly understand your products, channels,

target audiences, key performance indicators, outcomes and regulatory environments. It's always a two-way dialogue when we help you achieve more and resonate better.

And we've moved beyond classic marketing platforms to tell stories across the full digital frontier. Over the past year, we successfully grew the digital arm of our business and evolved our strategic capabilities. We had a hand in some of the biggest retail and hedge fund launches of 2023, and we continued to support our loyal client base with award-winning campaigns.

Our new brand also represents the people that make Ext. Marketing great. It's reflective of the outstanding team we've built, because it's their diverse talent and voices that create a truly differentiated experience for our clients.

In the year ahead, we will continue to listen, learn and use our voices to move forward and effect change in an industry where change is a constant. What doesn't change is the need for innovative strategies, outstanding content and **extraordinary creative.**

We wish you well in 2024. We look forward to continuing the dialogue with each of you, and amplifying our voice – and yours – this year and beyond. As you tackle the important and complex challenges ahead, know that we will always be here for you.

Sincerely,



**Richard Heft**  
Co-Founder &  
Co-CEO



**Jillian Bannister**  
Co-Founder &  
Co-CEO

# New year. New strategies.



The trends  
redesigning  
financial services  
marketing  
in 2024

As the financial services industry evolves in the era of digital transformation, we're once again standing at the forefront of dynamic opportunities and changes in marketing strategy, technology and communications. Dive into the trends shaping the future of financial marketing.

# 1.5 billion

total visits to ChatGPT  
in September 2023

No. 1

## AI finds its way into all marketing processes

Firms are quickly integrating ChatGPT and other AI tools into their marketing. Companies must use them judiciously. AI can be instrumental in idea generation at the beginning of marketing campaigns. In the middle stages, AI can help draft outlines and provide a starting point for marketers to refine and enhance their communications. AI speeds up and broadens research by aggregating and summarizing information.

We believe it's best to use AI to boost human effort, not replace it. AI is a force multiplier for marketing teams, allowing human creativity to flourish. While we'll never use AI for anything final, it can enrich content at its nascent stages, providing a foundation for human creativity.

No. 2

## Bite-sized & witty content wins

**A picture is worth a thousand words,** and 2024 is about consumable and easy-to-understand content. People are overwhelmed with information and, as a result, they lean toward well laid out and scannable content, snackable and engaging pieces like GIFs, quick videos that can be consumed in seconds, and clever content that's witty.

Videos, animations and data visualization will win in 2024. Our brains are wired to process visuals more efficiently than text – and turning dry statistics into compelling visuals makes them more understandable and engaging.

**55%**  
of first impressions are visual

# 77%

of marketers  
have seen  
an increase in  
email engagement

No. 3

## Email remains the undisputed champ

Digital marketing is an evolving landscape where new channels and platforms emerge daily. But what's one constant that marketers have relied on for years and will continue to use in 2024? Email.

Email lands directly in your audience's inbox. It allows for personalization that feels bespoke. And marketing teams can measure the impact of their campaigns, tweak them to improve performance and demonstrate ROI. This data becomes essential for marketers to justify their work. Email is highly versatile and can support a multi-touchpoint strategy that re-directs to a company's website, social page or any other digital destination that's part of the communications journey and conversion funnel.

# 46%

of marketers plan to focus on new data analysis technology

No. 4

## Businesses get their heads out of the clouds and put their ears to the ground

Sentiment analysis and social listening have expanded to provide a deep well of insights. They will shape how companies connect with their audience in 2024. Sentiment analysis and social listening help you craft tailored, timely and targeted messages that better align with current sentiment and address specific concerns. **These tools help you tune into online conversations** about your business to glean insights into what your audience loves, hates and wishes for – all invaluable information to help you improve your products, services and solutions.



No. 5

## Focus on the journey and the destination

A seamless and engaging customer experience (CX) journey will be essential in 2024 and beyond. By mapping out multiple CX journeys, businesses will understand customer pathways – crucial knowledge for tailoring experiences that meet diverse customer needs. Measuring key metrics at every decision point, or gate, in the customer journey sheds light on customer behaviours, preferences and pain points.

Firms will need to run user experience (UX) analysis to improve CX. We expect companies to create more structured navigation and menus, effective calls to action, logical page layouts and improved mobile responsiveness.



**Consistent  
brand presentation  
across all platforms  
increases revenue  
by up to 10% to 20%**



No. 6

## **Brands that never sleep**

Brands are more than logos and slogans – they’re living, breathing entities with stories to tell. Companies will start working toward an “always on” approach in 2024, and will actively promote themselves to remind clients and prospects of their value proposition. Companies will create and share content that resonates with their audience, including stories, experiences and values. Modern brands will also engage in two-way conversations. They’ll take feedback and address concerns to build genuine relationships. Yes, this will be a grind for many businesses. Yet it’s necessary if you want your firm to thrive, especially when conditions are challenging.

# 92%

**agree that  
accessibility  
for people  
with disabilities  
is a basic  
human right**



No. 7

## **Firms remove barriers to content**

The Americans with Disabilities Act of 1990 (ADA) and the Accessibility for Ontarians with Disabilities Act, 2005 (AODA) standards require organizations to create policies and practices that identify and remove barriers for people with disabilities. For us marketers, it impacts what we produce. In 2024, financial services firms must ensure they include alt text for all images, sufficient contrast between text and background, readable fonts, PDFs that are readable by screen readers, and content that is understandable via plain language. The ADA and AODA are law, so you must factor in compliance when working on your marketing strategy, and throughout your digital content creation.

# New year. New look.

Ext. Marketing isn't just embracing change, we're leading it with a brand refresh that reflects our core principles of innovation and excellence in financial services marketing. In this era of digital transformation, there will be profound changes to marketing strategy, technology and communications, and we're excited to bring this evolution to our clients.

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**Toronto**

18 King Street East  
Suite 1205  
Toronto, ON  
M5C 1C4

416.925.1700  
1.844.243.1830  
info@ext-marketing.com

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**New York**

450 7th Avenue  
Suite 1400  
New York, NY  
10123

917.304.1900  
1.844.243.1830  
info@ext-marketing.com

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**London**

86 Gloucester Pl  
London, UK  
W1U 6HP

0808.273.4880  
1.844.243.1830  
info@ext-marketing.com

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