

What Marketers in Financial Services Need to Know to Win in 2025

A deep dive into the 2024 Superpowers Index reveals what's important to financial services buyers, the top priorities for financial services marketers, and the key trends impacting the financial services sector in 2025.



Introduction

In the rapidly evolving landscape of financial services, staying ahead of the curve is crucial for marketers aiming to capture and retain customer interest.

This report offers a comprehensive analysis based on insights from the **2024 Superpowers Index**. It delves into the core values and priorities of financial services buyers, highlights the top strategies for marketers, and identifies the key trends that will shape the sector in the coming year.

What's important to financial services buyers in 2025?

TOP TRIGGERS FOR FINANCIAL SERVICES PURCHASES



In 2025, buyers are primarily driven to seek new financial services products and solutions due to the need for cost reduction. This drive for cost efficiency is prompting businesses to explore innovative financial solutions that can streamline processes and reduce overheads.



Another significant trigger is the increase in customer expectations. As consumers demand more personalized and efficient services, businesses are compelled to upgrade their financial products to meet these evolving needs.

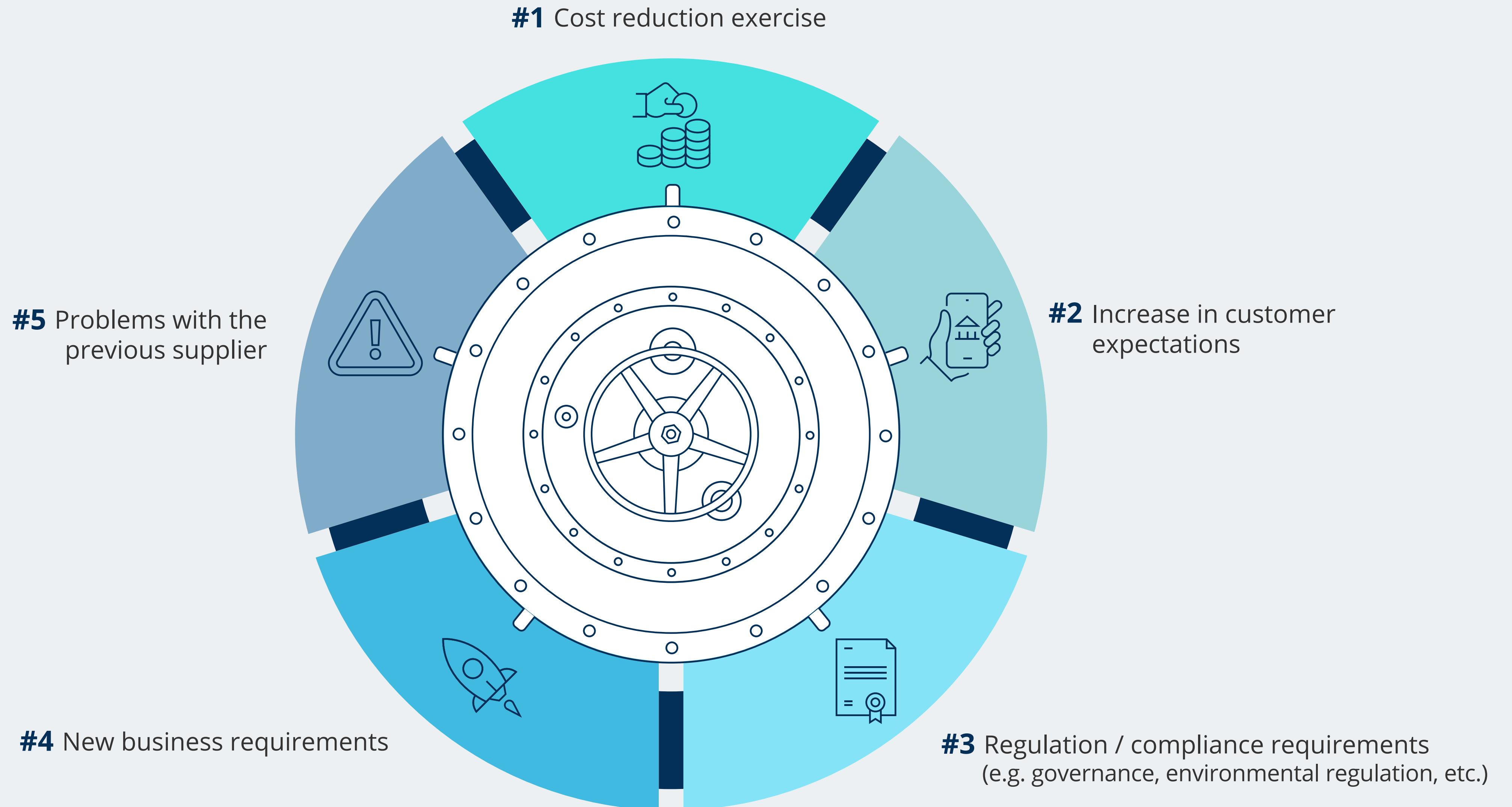


The growing emphasis on governance and environmental regulations also necessitates the adoption of new financial products that can help manage compliance effectively.



Additionally, new business requirements and issues with previous suppliers further motivate businesses to explore better financial services options to support their growth and operational stability.

WHAT ARE THE TOP TRIGGERS DRIVING FINANCIAL SERVICES BUYERS TO LOOK FOR NEW PRODUCTS AND SERVICES IN 2025?



TOP DECISION-DRIVERS FOR FINANCIAL SERVICES BUYERS

The 2024 Superpowers Index shows that trust and security are still top priorities for buyers, with feeling safe when signing a contract and suppliers being approachable and transparent maintaining their positions in the top 5.

Being known as a good employer has become significantly more important, moving from 15th to 1st place. This indicates a growing emphasis on ethical and social practices.

Additionally, meeting minimum quality and functional needs, offering enough variety and choice, and customizable products and services have all seen significant rises. This suggests buyers are focusing on fundamental capabilities, a broader range of options to meet their diverse needs, and tailored solutions that can be adapted to their specific requirements.

Lastly, being active thought leaders has jumped from 23rd to 10th place. This suggests that buyers are valuing suppliers who are seen as innovators, likely appreciating their insights and forward-thinking approaches.

What matters most to buyers when choosing suppliers of financial services products and services?

2024 RANK		2023 RANK	
#1	Is known as being a good employer	15 th	Is known as being a good employer
#2	Meet my company's minimum quality / functional needs	17 th	Meet my company's minimum quality / functional needs
#3	Approachable & transparent in their dealings with us	5 th	Approachable & transparent in their dealings with us
#4	I feel safe signing a contract with them	1 st	I feel safe signing a contract with them
#5	Quick to respond and can adapt to changing plans	8 th	Quick to respond and can adapt to changing plans
#6	Offer enough variety and choice	19 th	Offer enough variety and choice
#7	Products and services that can be customized	20 th	Products and services that can be customized
#8	Has a culture of diversity and inclusion	13 th	Has a culture of diversity and inclusion
#9	Supports us with expertise	4 th	Supports us with expertise
#10	Active thought leaders in their category / sector	23 rd	Active thought leaders in their category / sector

INFORMATION NEEDS & SOURCES USED ACROSS THE BUYER JOURNEY

What information are buyers of financial services looking for and which sources are they using at each stage of the buying journey?

At the start of the journey when deciding which brands to consider, buyers are focused on identifying products and services that meet their requirements, assessing affordability against budgets, and looking for new ideas on how to tackle their challenges.

To gather this information, buyers are turning to concise and accessible content from suppliers, recommendations and first-hand experiences from peers, and looking at supplier websites.

During the initial research process, buyers are looking into the credentials and performance of suppliers alongside building a clearer picture of appropriate products and pricing options, while still seeking information from short-form content from suppliers, industry experts and commentators, and news articles that mention the supplier.



DECIDING WHICH BRANDS TO CONSIDER

DURING THE INITIAL RESEARCH PROCESS

INFORMATION NEEDS

- Researching appropriate products and services (34%)
- To understand pricing of the solution (33%)
- Looking for inspiration / alternative ways of addressing our needs (32%)

- Researching appropriate products and services (32%)
- To understand pricing of the solution (31%)
- Understanding the credentials / performance of suppliers (29%)

INFORMATION SOURCES

- Short-form content from suppliers (36%)
- Industry-specific communities / forums (34%)
- Supplier websites (34%)

- Short-form content from suppliers (40%)
- Industry analyst firms and consultants (39%)
- News articles about the supplier (34%)

INFORMATION NEEDS & SOURCES USED ACROSS THE BUYER JOURNEY

What information are buyers of financial services looking for and which sources are they using at each stage of the buying journey?

After initial research has been conducted but before requesting a formal quote/proposal, buyers are deepening their research and starting to compare different solutions offered by suppliers. At this stage, buyers are also seeking more detailed and specific information from suppliers via in-depth, long-form content, in addition to industry analyst views and short-form content from suppliers.

When comparing quotes and making a final decision, buyers are also looking to understand the culture, values, and trustworthiness of suppliers and the extent to which these align with their employer's and their own values. To gather this information, buyers are consuming short-form and in-depth content from suppliers, as well as seeking opinions from credible, independent third parties.



INFORMATION NEEDS

- To understand pricing of the solution (33%)
- Researching appropriate products and services (31%)
- Building awareness of which suppliers offer appropriate solutions (30%)

- To understand the pricing of the solution (34%)
- Researching appropriate products and services (29%)
- Understanding the culture, values and trustworthiness of suppliers (29%)

INFORMATION SOURCES

- Short-form content from suppliers (37%)
- Industry analyst firms and consultants (37%)
- In-depth content from suppliers (29%)

- Short-form content from suppliers (36%)
- Industry analyst firms and consultants (35%)
- In-depth content from suppliers (27%)

Considerations for marketers

The 2024 Superpowers Index highlights the evolving priorities and decision-making processes of financial services buyers. Understanding these shifts is crucial for marketers aiming to effectively engage with their target audience and drive successful outcomes.

The top triggers for seeking new products and services, such as cost reduction, increasing customer expectations, and regulation and compliance requirements, underscore the need for efficiency, adaptability, and responsiveness to market and policy changes.

Additionally, the significant rise in the importance of thought leadership and DEI reflects a broader trend towards valuing expertise, ethical practices, and alignment with personal values.

CONSIDERATIONS
FOR
MARKETERS:



#1

Emphasize Cost Efficiency and Innovation

Buyers are increasingly seeking innovative solutions that can streamline processes and reduce overheads. Focus on showcasing how your products and services can deliver cost savings and operational efficiencies. Highlighting case studies and success stories that demonstrate tangible benefits can help build credibility and attract cost-conscious buyers.

CONSIDERATIONS
FOR
MARKETERS:

#2

Build Trust Through Ethical Practices

Being known as a good employer and maintaining ethical practices have become significantly more important. Emphasize your company's reputation for transparency, ethical standards, and social responsibility. Promoting initiatives related to diversity, inclusion, and community engagement can enhance your company's image and build trust with potential buyers.





CONSIDERATIONS
FOR
MARKETERS:

#3

Provide Tailored and Thoughtful Content

In the early stages of the buyer journey, concise content that highlights product suitability and pricing is crucial. As buyers progress, they look for detailed information on supplier credentials and performance. Ensure you're providing a mix of short-form and in-depth content, leveraging industry analyst insights and credible third-party opinions. Tailoring content to address specific buyer needs at each stage can significantly influence their decision-making process.

What are the top priorities for marketers in the financial services sector?

HIGHEST PRIORITY MARKETING STRATEGIES

Encouragingly, the top priorities of marketers in the financial services sector reflect the needs and decision-drivers of today's buyers.

'Building our brand position through thought leadership' came out in joint-second place, indicating that marketers are placing high importance on creating quality content that showcases their expertise and builds trust and credibility.

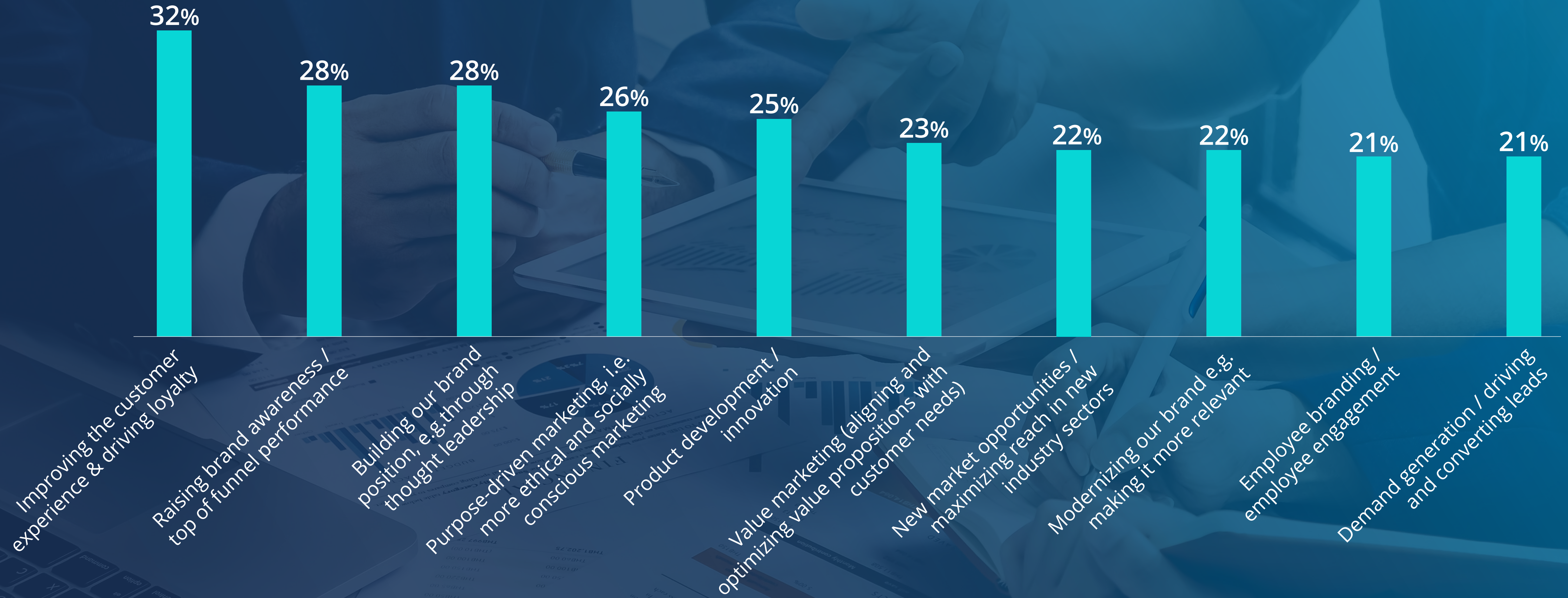
'Meeting my company's minimum quality / functional needs', 'offering enough variety of choice', and 'products and services can be customized' all featured in the top 10 decision drivers for financial services buyers (2nd, 6th and 7th respectively), so it's also encouraging to see 'product development / innovation' in the top 5 priorities for marketers.

The growing influence of DEI and alignment with personal values and ethics is also reflected in the top priorities of marketers, with 'purpose-driven marketing' and 'modernizing our brand by making it more relevant' taking the 4th and 8th spot respectively.

In the previous section, we highlighted the importance of suppliers addressing the information needs of buyers to support them throughout the buyer journey, and marketers placing 'improving the customer experience and driving loyalty' at the top of their priority list suggests they are aware of this and taking it seriously.



Which marketing strategies are top priority for marketers in the financial services sector in 2025?



What are the key trends impacting the financial services sector?

The 2024 Superpowers Index reveals several key trends that are shaping the financial services sector, particularly in relation to digital transformation and the adoption of artificial intelligence (AI). These trends highlight the evolving preferences and expectations of buyers, as well as the opportunities and challenges presented by new technologies.

CURRENT BUSINESS TRENDS

51% of decision-makers in the financial services sector prefer the speed and convenience of buying digitally / through eCommerce, compared to **23%** who prefer the human touch of dealing with people from suppliers, reflecting the growing importance of digital channels in the purchasing process. Buyers are increasingly looking for efficient and convenient ways to procure products and services.

TREND: PREFERENCE FOR DIGITAL AND ECOMMERCE SOLUTIONS

Statement A

I prefer the **speed and convenience** of buying **digitally** / through eCommerce

Strongly agree with A

24%

Slightly more A than B

27%

Both the same

26%

Slightly more B than A

14%

Strongly agree with B

9%

Statement B

I prefer the **human touch** of dealing with **people** from suppliers

61% of decision-makers in the financial services sector expect to be able to purchase all products and services for their business through eCommerce platforms, compared to **17%** who agreed that it is not appropriate to buy any products and services for my business through eCommerce platforms, further emphasizing the shift towards digital-first procurement.

TREND: EXPECTATIONS FOR ECOMMERCE PLATFORMS

Statement A

I expect to be able to **purchase all products** and **services** for my business through eCommerce platforms

Strongly agree with A



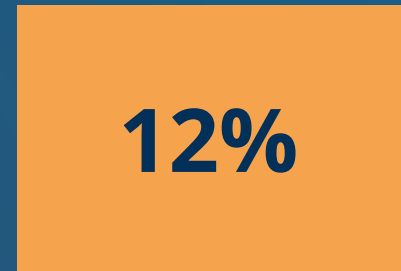
Slightly more A than B



Both the same



Slightly more B than A



Strongly agree with B



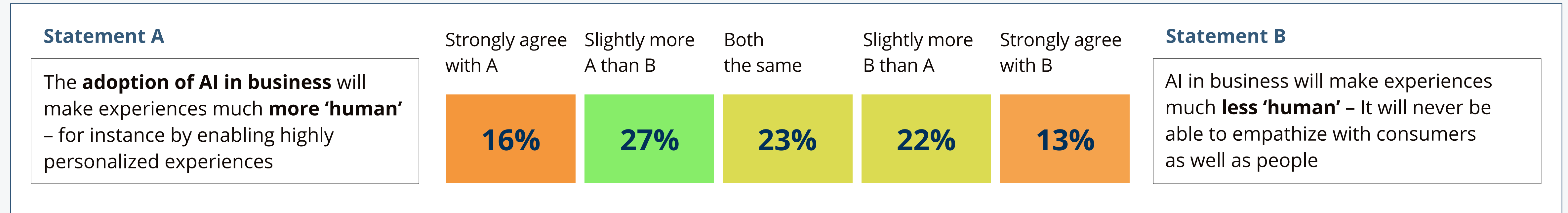
Statement B

It is **not** appropriate to buy any **products** and **services** for my business through eCommerce platforms



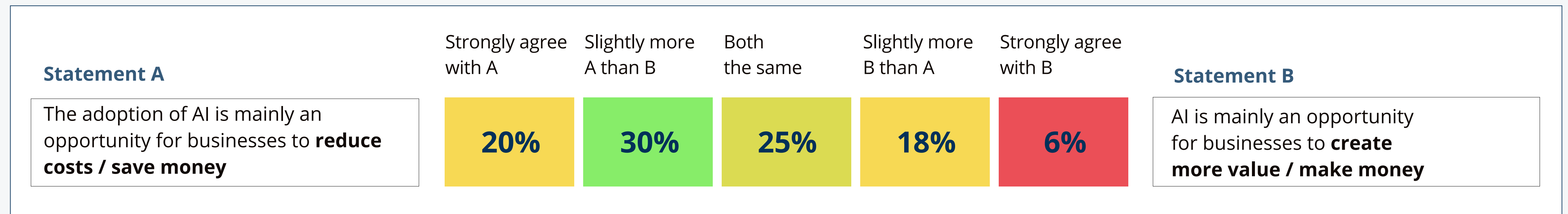
TREND: ADOPTION OF AI IN BUSINESS

43% of decision-makers in the financial services sector agree that the adoption of AI in business will make experiences much more 'human', for example by enabling highly personalized experiences, compared to **35%** who agreed that AI in business will make experiences much less 'human', for example AI will never be able to empathize with consumers as well as people can.



50% of decision-makers in the financial services sector agree that the adoption of AI is mainly an opportunity for businesses to reduce costs / save money, compared to **24%** who agree that AI is mainly an opportunity for businesses to create more value / make money.

While AI is recognized for its potential to personalize experiences and improve efficiency, there are also concerns about its ability to empathize with consumers and create value for the business.

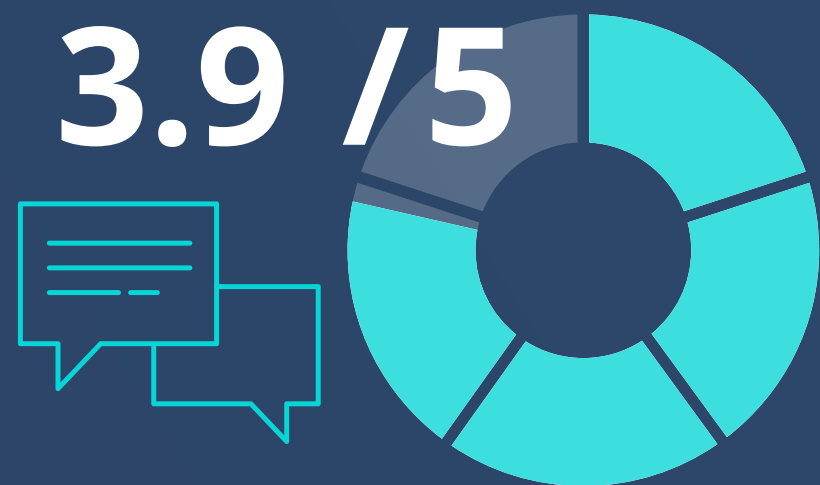


ATTITUDES TOWARDS SUPPLIERS

Similarity of marketing and communications messages

Decision-makers perceive that many brands have very similar marketing and messaging, suggesting that brands need to focus on creating unique and differentiated propositions and messaging that sets them apart from competitors.

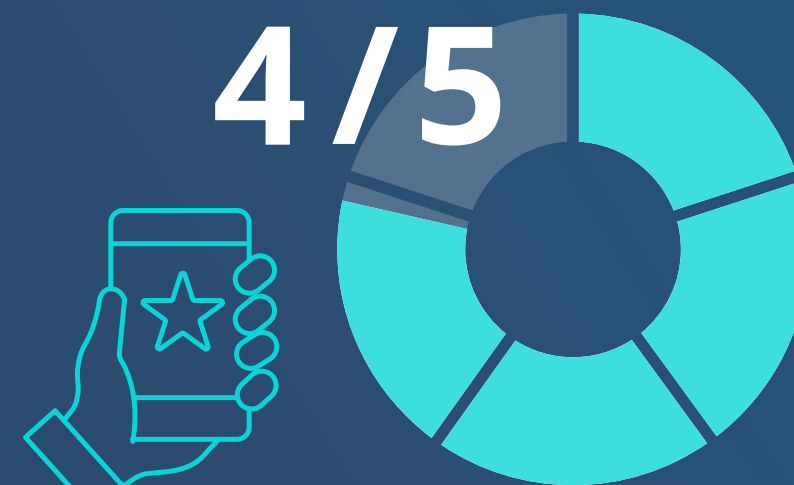
“Many of the brands I see at work have very similar marketing and communications messages – they all sound and act the same.”



Desire to be better understood

Decision-makers want suppliers to spend more time understanding their specific needs and providing solutions to their day-to-day problems, suggesting that brands should prioritize building deeper relationships with customers by actively listening to their needs and challenges and providing tailored solutions.

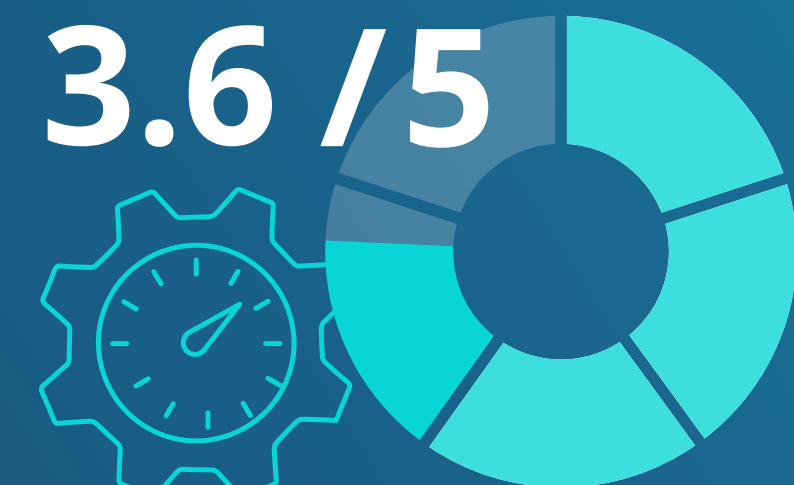
“I would like business suppliers to spend more time seeking to understand me and how it can solve day-to-day problems I face at work.”



Lengthy purchasing processes

Decision-makers feel that purchasing journeys with most B2B suppliers takes too long, indicating inefficiencies and potential frustrations, suggesting that brands should focus on identifying and eliminating friction and bottlenecks in the sales process.

“It takes far too long to make a purchase from most of our B2B suppliers.”



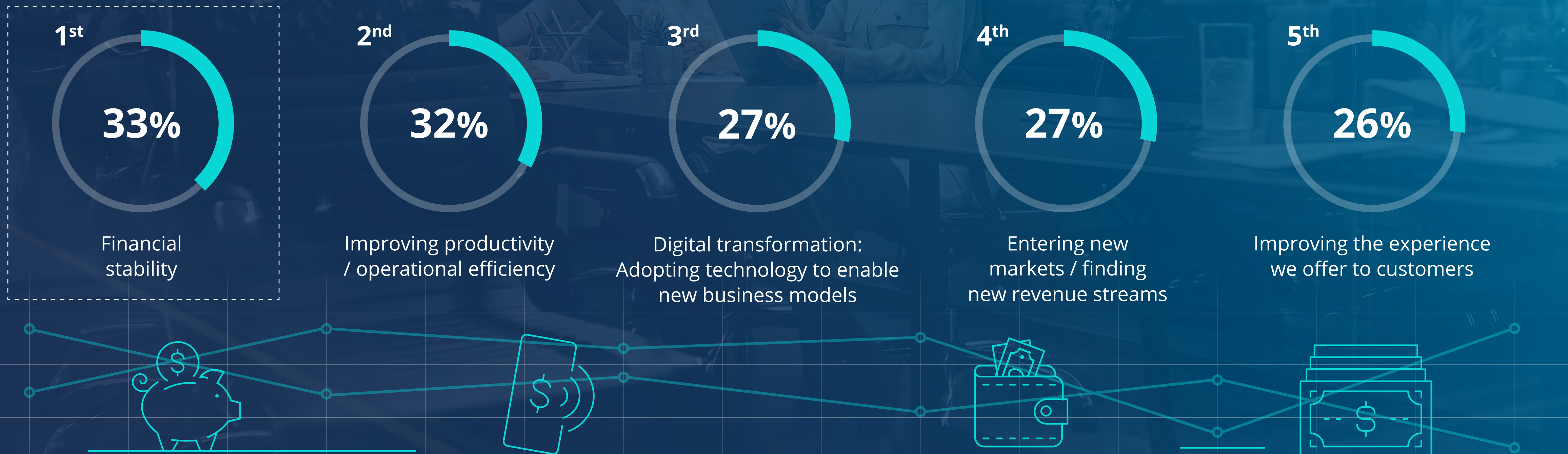
TOP BUSINESS PRIORITIES

The top priorities for financial services brands over the next two years are 'financial stability' and 'improving productivity / operational efficiency', underscoring the need to optimize processes, reduce waste, and enhance overall performance to remain competitive.

'Approachable and transparent with their dealings with us' and 'quick to respond and can adapt to changing plans' were both in the top 5 decision drivers for financial services buyers and it's therefore encouraging to see brands also prioritizing 'improving the experience we offer to customers' in their business strategies over the next two years.

Digital transformation is also a critical priority as brands look to adopt new technologies to innovate and develop new business models.

Which business strategies are financial services brands prioritizing over the next 2 years?





For a unique perspective on many of the big trends in B2B, including the importance of trust and brand building, the ever-narrowing gap between winning and losing, the growing influence of thought leadership, and the challenges of scaling ABM, check out the full [2024 Superpowers Index](#)