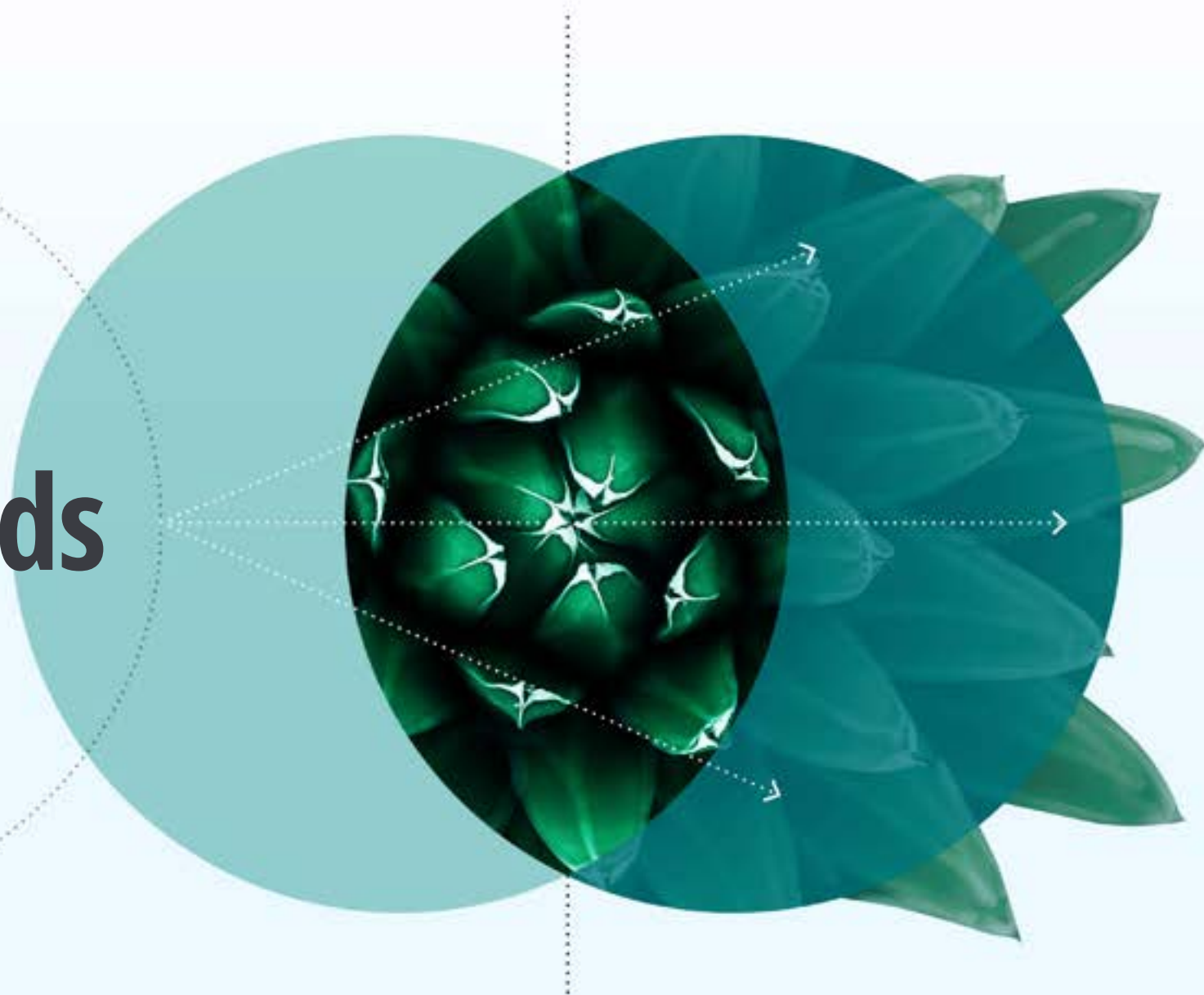**Deloitte.**
Insights

2022 Global Marketing Trends

Thriving through customer centricity

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Deloitte's CMO Program supports CMOs as they navigate the complexities of the role, anticipate upcoming market trends, and respond to challenges with agile marketing. **Read more on the latest marketing trends and insights**.

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Introduction

Thriving through customer centricity

Macro trends, from the integration of digital and physical channels to increasing calls for diversity, are upending the marketing function. What can brands learn from their highest-growth counterparts to thrive?

2022 Global Marketing Trends
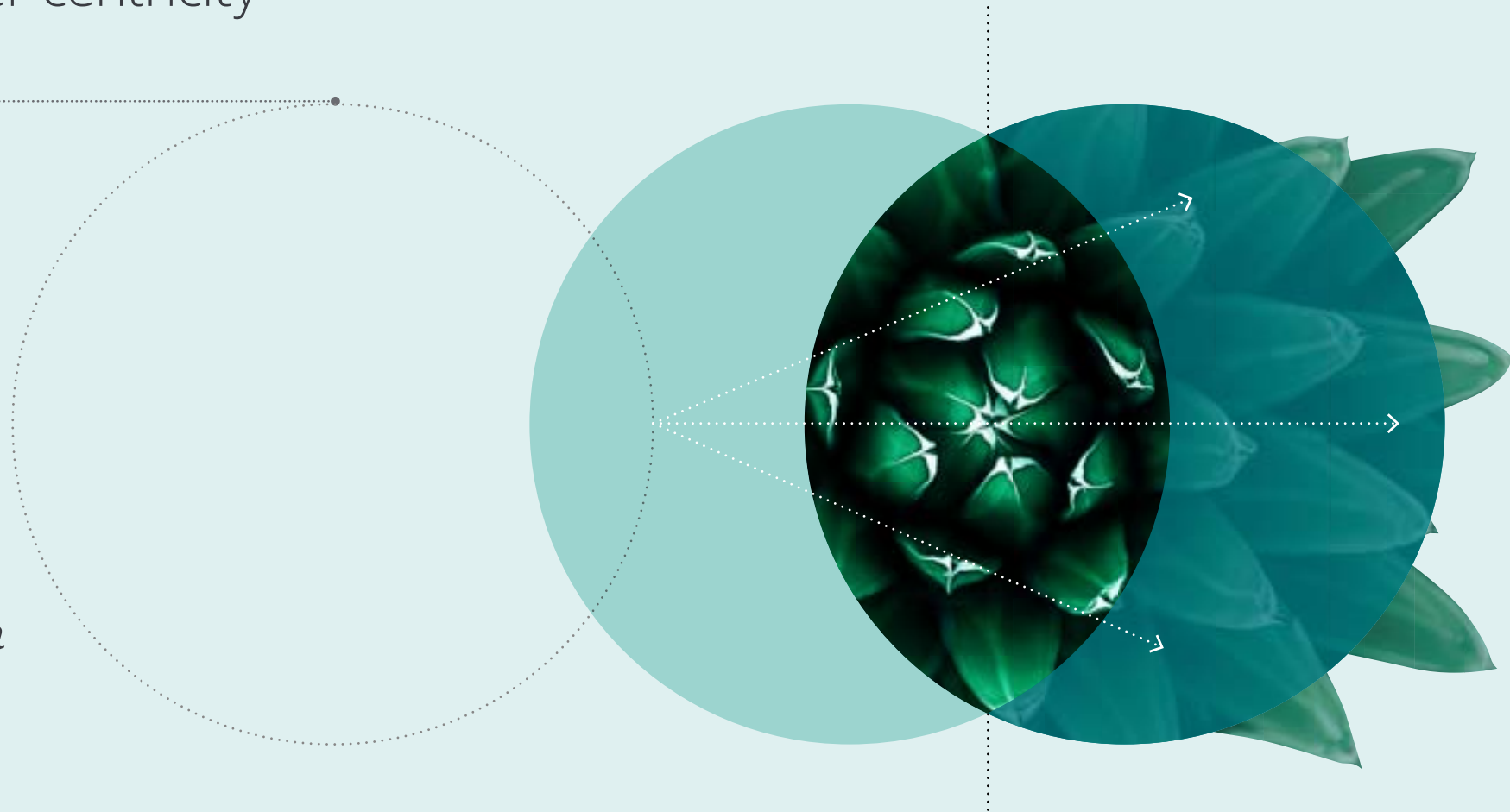
The past 18 months forever redefined customer engagement strategies—and with this change has come unprecedented complexity. Consider just a few of the macro trends unfolding in the market: In a world where people continuously toggle between digital and physical channels, linear customer journeys are almost a relic of the past. Consumers expect more tailored and personalized experiences but, simultaneously, are more guarded in how their data is captured and deployed. Even the definition of convenience has changed as people expect items and services to be available at the push of a button. Beyond products and services, people are more attuned to what a brand stands for—and if it's *only* maximizing profit, many will walk away before the brand can even put an offer in front of them.

These trends are creating just as much complexity within the four walls of the organization. As artificial intelligence becomes core to the entire customer experience, teams are scrambling to find the right mix of talent that elevates—and integrates—the creative and analytical. In parallel, brands are continuously looking to ensure their talent is just as representative and inclusive as the experiences they hope to deliver to market. And underscoring all of this is the reality that marketing budgets shrunk to record lows at a time when expectations are at an all-time high.[1]

Given these trends, how can brands thrive in an increasingly complex world?

We believe the answer requires *holistically* rethinking the way brands engage with customers—and for good reason: When we surveyed over 1,000 global executives, we found the highest-growing brands (defined as those with 10% or higher annual growth) are moving beyond point solutions and comprehensively addressing the entire customer experience—encompassing everything from activating an enterprisewide purpose to overhauling entire customer data strategies.

Taking the lead from these high-growth organizations, we took a multifaceted approach to the 2022 *Global Marketing Trends* report. In addition to surveying executives from five countries, we polled 11,500 consumers across the globe, as well as conducted 18 in-depth interviews with executives from leading global brands (see sidebar "Research methodology" to learn more). In total, we identified seven trends that are customer-centric and take a 360-degree view of the solution set.

360-degree engagement: People, data, and experiences

To provide leaders with a road map to thriving in these unprecedented times, we organized our trends into three sections: people, data, and experiences.

However, these sections are not mutually exclusive endeavors. They comprise an interdependent system that, when integrated, forms the basis of dynamic customer experiences.

Putting *people* at the center

The opening trends in our report build the foundation through which everything else flows: the people the brand serves.

Purpose—A beacon for growth

Explores how high-growth brands are cutting through the noise of competing on price and quality alone and building a competitive advantage by committing to and communicating their impact beyond profit.

Authentically inclusive marketing

Focuses on how marketers—and their advertisements—are generally the face of what a brand stands for beyond profit maximization to consumers. And as populations continue to become more diverse and increasingly prioritize representation, it's important to get the brand *authentically* right or risk losing your customer of today—and the future.

Building the intelligent creative engine

In a fast-paced world, marketers need a talent model that moves at the speed of culture. This trend highlights how brands are unleashing creative content that better resonates with today's world. This includes using agile cohorts of creative and analytical talent to solve customer problems and seeking new forms of external talent, for example, by turning influencers from product spokespeople to creative agents.

Building the *data* infrastructure

The proliferation of channels has led to myriad sources of data. However, more is not always better, and, in some cases, what's available today won't be here tomorrow. Our next two chapters provide guidance in navigating this increasingly complex data environment.
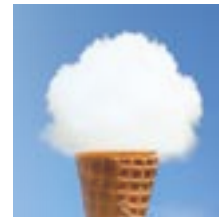
Meeting customers in a cookieless world

Discusses how marketers should be preparing for an environment where less information will be available as third-party cookies continue to disappear. Further, we note how high-growth brands are already ahead in their first-party data strategies.
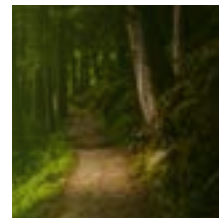
Designing a human-first data experience

But it's not just about moving to a first-party data strategy; *designing a human-first data experience* shifts the lens to consumers to better understand the balance between people finding the use of their data helpful and, well, creepy.

Designing dynamic *experiences*

The customer experience is the culmination of every step along the way. In this spirit, our final two chapters highlight how brands can bring everything together to ensure their experiences match their aspirations of delivering dynamic solutions to customers.

Elevating the hybrid experience

Lays out how brands can build dynamic, cohesive experiences in both their digital and in-person environments through leading principles from human-centered design.

Supercharging customer service with AI

Considers the consumer's perspective to show how timely offers and knowledgeable customer service can better help consumers make purchase decisions. This trend reveals how artificial intelligence can be integrated with human service to bring the best of both to the entire customer journey.

Together, these trends highlight that marketing is a powerful force for growth in designing customer experiences that foster trust and meet human needs.

Research methodology

To ensure a globally relevant, cross-topic understanding of marketing and the customer experience, we conducted two global surveys and 18 in-depth interviews with global executives.

The **Global Marketing Trends Executive Survey** polled 1,099 C-suite executives from global companies located in the United States (62%), the United Kingdom (11%), France (9%), Japan (9%), and the Netherlands (9%) in April 2021. This survey asked chief executive, marketing, information, finance, operating, legal, and human resource officers their thoughts on a variety of topics driving the evolution of the marketing function. As this report focuses on marketing and customer experience leaders, 50% of the respondents consisted of chief marketing officers or those with similar titles (such as chief experience officer and chief growth officer), with nearly equal distribution across the other C-suite roles.

All businesses (outside of the public sector) had at least US$500 million in annual revenues, with 73% having over US$1 billion.

The **Global Marketing Trends Consumer Survey** polled 11,500 global consumers, ages 18 and above, in May 2021 across 19 countries: the United States, Canada, Mexico, Brazil, Chile, South Africa, Sweden, the United Kingdom, Italy, Ireland, France, Spain, Turkey, Switzerland, Denmark, Portugal, Japan, India, and China.

Separately, **executive interviews** were conducted throughout 2021 and involved 18 executives who either currently or previously held chief marketing, customer experience, or executive officer roles. Their insights were key to uncovering the trends included in this report.

ENDNOTE

1. Kelly Blum and Gloria Omale, "Gartner says marketing budgets have plummeted to 6.4% of overall company revenue in 2021," press release, Gartner, July 14, 2021.

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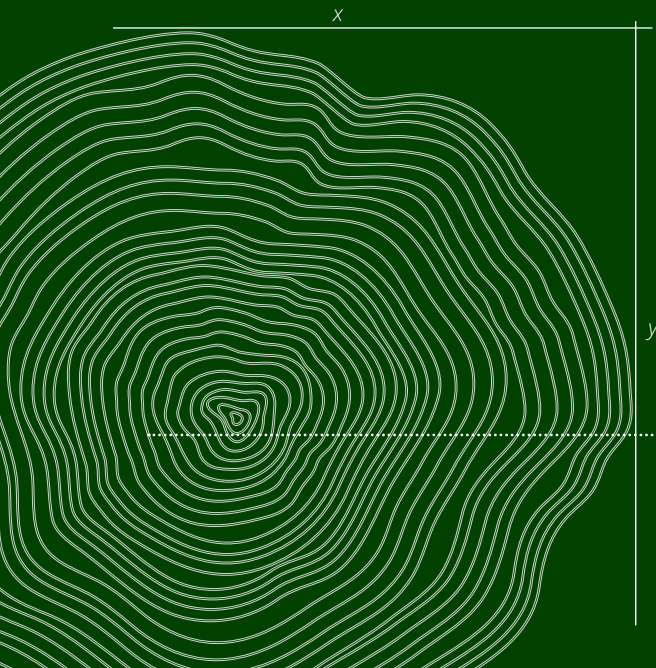

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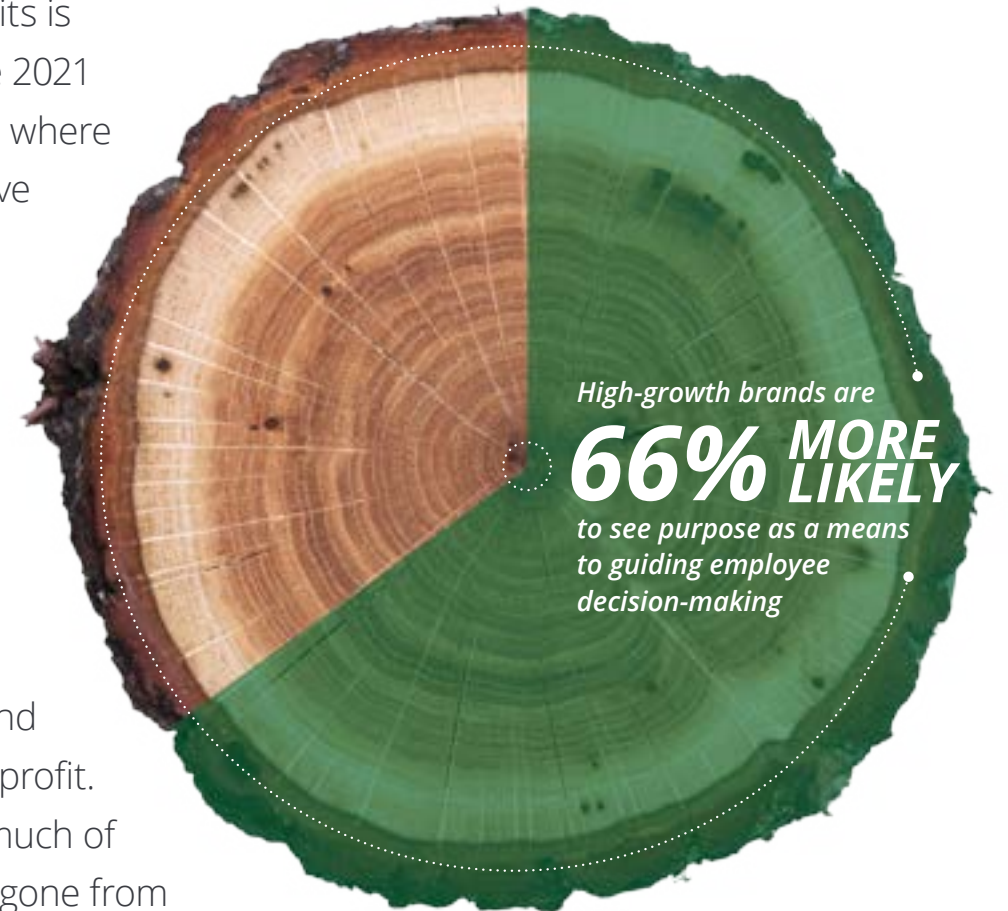
Purpose—A beacon for growth

How brands can gain a competitive advantage through an authentic purpose

Many organizations are redefining why they exist beyond profit—pushing them to rethink everything from product delivery to employee and community engagement. How does marketing play a role in purpose?

The expectation that the purpose of businesses should go beyond maximizing profits is becoming more common. Take the 2021 Edelman Trust Barometer findings, where 68% of consumers believe they have the power to force corporations to change, and 86% of people expect CEOs to speak out on societal issues.[1] Whether it's creating a more equitable world, reaching net-zero emissions, or protecting consumer privacy, to name a few, many organizations are redefining the articulation of why they exist and how they make an impact beyond profit. For many, having "purpose" drive much of their business and operations has gone from aspiration to strategic priority.

High-growth brands are
66% MORE LIKELY
to see purpose as a means to guiding employee decision-making

With this elevated prioritization comes greater complexities, as businesses rethink everything from their product delivery and brand messaging to employee and community engagement strategies. Getting all this right and resonating with consumers who debate which brands to choose is no small task—especially in a world where price and quality still matter.

Purpose: The new growth

Still, it's worth asking, do consumers *really* make purchasing decisions based on what a brand stands for? A skeptic may think that while people care about these issues, more traditional purchasing criteria, such as price, still reign supreme.

In our research of 11,500 global consumers, we found the purpose skeptics may have a point. When we asked people why they chose to purchase from a specific brand across eight different categories (automotive, travel, apparel and footwear, beauty and personal care, household equipment, furniture, electronics, and banking), **price** and **quality** were individually cited as top-three purchasing criteria anywhere between 61% and 86% of the time (that is, at least one of the two reasons appeared almost every time).

If we stopped here, we would assume that while people state they care about issues beyond end-product delivery, they often vote differently with their wallets. But there's more to the story.

When we dig deeper, we see a number of areas where people do elevate other criteria apart from price and quality, but in a more nuanced way. For example, we found:

- A third of consumers 25 and younger see sustainability as a top criterion for beauty and personal care product purchases.

- For banking decisions, nearly a quarter emphasize data privacy as a key requirement to winning their business. Additionally, we are seeing entire business models arise around data privacy in the business-to-business (B2B) space. For instance, OneTrust, an enterprise platform company, works with half of the Fortune 500 to "operationalize trust" through implementing agile programs across privacy; security; data governance; governance, risk management, and compliance; third-party risk; ethics and compliance; and environmental, social, and corporate governance programs.[2]

- Globally, 57% indicated that, in general, they are more loyal to brands that commit to addressing social inequities (see our trend "*Authentically* inclusive marketing" to learn more).

Taken together, we see a clear theme emerge: While all brands definitely still need to deliver price and quality, these two dimensions are largely commodity features—or table stakes—rather than differentiators. Other criteria, including purpose-related factors, then become competitive differentiators. In

These holistic purposes are capturing a new kind of growth, one that is more equitable and inclusive across all stakeholders.

short, purpose is a more personal—and tailored—endeavor. When brands know whom they are serving and what those individuals specifically care about, they can position their purpose as a competitive differentiator and, as importantly, move in the direction those consumers are expecting.

And there is evidence that brands that commit to purpose *are* gaining that competitive advantage. When we polled 1,099 global executives, we found that high-growth brands (those with 10% or more annual growth) are translating purpose into action in markedly different ways from their lower-growth peers: They are looking at purpose more holistically. These holistic purposes are capturing a new kind of growth, one that is more equitable and inclusive across all stakeholders while tied to issues people truly care about.

We explore how businesses, and their marketers, can follow the road map of these high-growth brands and bring the customer's voice into the organization to help ensure the brand is taking an authentic purpose to market.
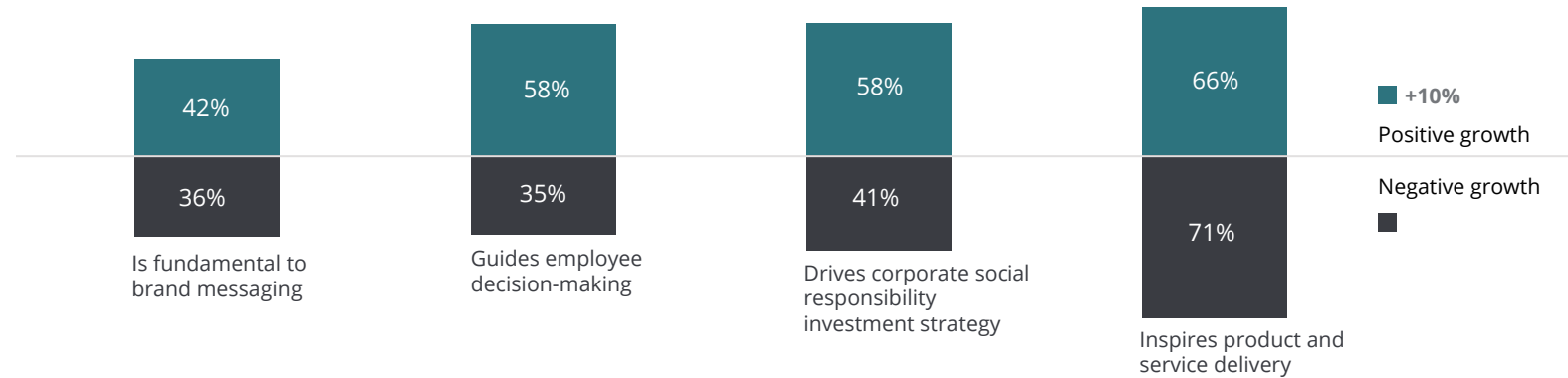
Growing with a holistic purpose

How are high-growth brands activating purpose more holistically? While high-growth and low-growth brands see purpose as a means to inspire product and service delivery at a similar rate (66% versus 71%, respectively), high-growth brands are 66% more likely to see purpose as a means to guiding employee decision-making, and 41% more likely to have purpose drive the corporate social responsibility investment strategy (figure 1).

Further, high-growth brands put a premium on accountability, with 93% indicating that they have established key performance metrics related to their purpose statement (versus 72% of negative-growth organizations). Such metrics include those pertaining to product portfolio measurements (50%); diversity, equity, and inclusion (47%); and the employee review process (44%).

FIGURE 1

High-growth brands prioritize purpose across the organization

In your opinion, which of the following statements reflect what company purpose means to your organization?

+10%
Positive growth

Negative growth

42%	58%	58%	66%
Is fundamental to brand messaging	Guides employee decision-making	Drives corporate social responsibility investment strategy	Inspires product and service delivery
36%	35%	41%	71%

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

Note: N=1,039 and excludes public sector responses.

Putting purpose into action

To position purpose as a competitive differentiator, brands can consider the following actions, based on insights derived from our consumer and executive studies:

- **Start with organizational "ethos," then refine through stakeholder values.** There are many internal facets that define an organization—values, company history, and, to a lesser degree, products and services offered—and that also underpins its purpose. However, stakeholder expectations and value can also shape that purpose, and different macro issues resonate with specific stakeholder groups and segments, as our consumer survey showed.

  Yves Rocher, a France-based beauty and personal care brand, derived its purpose "reconnect people to nature" from the views of its founder of the same name, says global CEO Guy Flament. "Our founder was convinced that humankind, without nature, will disappear… The point is not to exploit nature but to manage our lives to be symbiotic with nature." As such, each of Yves Rocher's products and experiences are designed to empower all stakeholders, from employees to customers to manufacturers, to better understand and connect with this guiding purpose.[3]

  Organizations can consider their strengths as they decide on which issues to focus to make a tangible impact. This can prevent them from leaning too far into issues for which they're not equipped to make an impact.

- **Purpose requires enterprisewide alignment—and being held accountable.** The highest-growth brands more often measure their purpose, from product delivery to the employee review process. Establishing key performance indicators can help ensure the brand continuously keeps its purpose front and center—and aligns that purpose across the entire organization. As former chief marketing officer (CMO) of Keds, Emily Culp, notes, it takes "humility and wherewithal to take a step back and take in every single touch point so you're asking your warehouse employees, if you manufacture service and goods, all the way through reading social media comments [and] call log transcripts" to truly understand how your company is living out its purpose in the eyes of all stakeholders.[4]

- **CMOs connect purpose and the customer experience.** Lisa Bowman, the former head of corporate relations at The UPS Foundation and global CMO of United Way, explains that "the marketer absolutely has a role in defining the *why*, because the *why* is the absolute soul of the brand."[5] CMOs are uniquely positioned to bring the customer voice to the organization and ensure that purpose is embedded in every customer touch point. This includes brand messaging, product and service delivery, and guiding the employees responsible for delivering these customer experiences. For instance, in order to keep its purpose and mission front and center for employees, global B2B technology company VMware assesses each of its product lines to ensure they closely align to "sparking innovation that creates lasting change" through its product use cases—an activity that also helps ensure purpose is top of mind for employees as well.[6]

The companies that continuously work to ensure that their purpose mirrors stakeholder needs, and then commit to bringing those solutions to life, are the ones likely best positioned to make purpose a competitive differentiator.

About the research

The **Global Marketing Trends Executive Survey** polled 1,099 C-suite executives from global companies located in the United States, France, Japan, the United Kingdom, and the Netherlands in April 2021. This survey asked chief executive, marketing, information, finance, operating, legal, and human resource officers their thoughts on a variety of topics driving the evolution of the marketing function.

The **Global Marketing Trends Consumer Survey** polled 11,500 global consumers, ages 18 and above, in May 2021 across 19 countries.

See the **introduction** to learn more about both studies.

ENDNOTES

1. Edelman, *Edelman Trust Barometer 2021*, March 2021.
2. OneTrust, "Home page," accessed September 3, 2021.
3. Interviews conducted between May and August of 2021 as part of the 2022 *Global Marketing Trends* research.
4. Ibid.
5. Ibid.
6. Example highlighted by VMware CMO Carol Carpenter during our *Global Marketing Trends* interview series conducted in August 2021.

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Authentically inclusive marketing

Winning future customers with diversity, equity, and inclusion
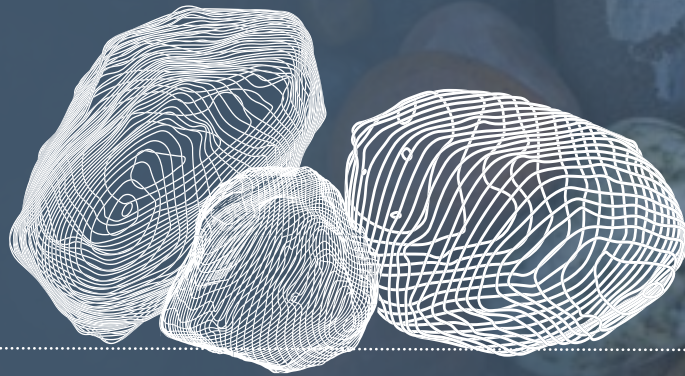
While the marketing function is increasingly focusing on more inclusive advertising, consumers—who are increasingly diverse—expect brands to follow through on these promises. Learn about three ways marketing can do this.
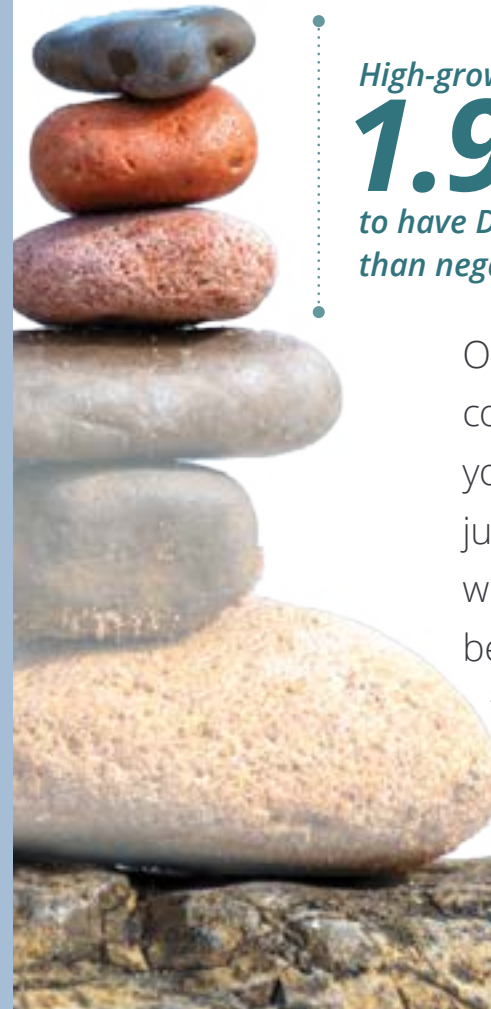
High-growth brands are

1.9X MORE LIKELY

to have DEI-related talent objectives than negative-growth brands

On a given day, up to 10,000 discrete advertisements bombard consumers during their waking hours.[1] Consumers—especially the youngest generations—are expecting more from these messages than just details about the latest seasonal sale. Rather, they are questioning whether a brand supports diversity and inclusion both publicly *and* behind the camera—and this focus is becoming increasingly important to brands as well.
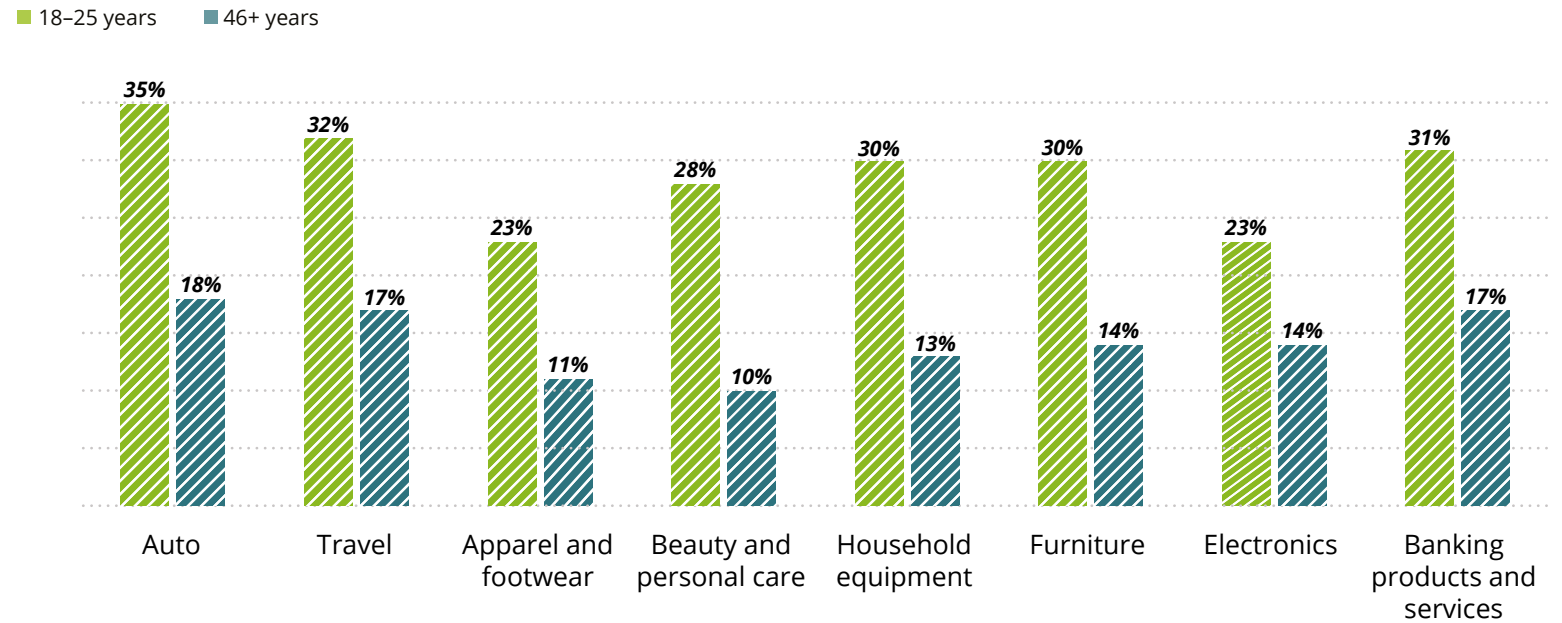
As the consumer population diversifies—by race and ethnicity, sexual orientation, or differences in ability, for example—it's imperative for brands to authentically reflect a range of backgrounds and experiences within their messaging if they expect to effectively connect with future customers. In our survey of 11,500 global consumers, we found the youngest respondents (from 18 to 25 years old) took greater notice of inclusive advertising when making purchase decisions (figure 1).

What's more, when we examined the US results by ethnicity and race, respondents were up to two-and-a-half times more likely to be aware of a brand prominently promoting diversity when making a product or experience purchasing decision if they identified as Asian or Pacific Islander, Black or African American, Hispanic American, Native American or Alaska Native, or multiracial or biracial.

But it's not enough to just *market* inclusiveness or diversity, as our results also show 57% of consumers are more loyal to brands that *commit* to addressing social inequities in their actions. Appealing to the loyalties of future customers can require brands to demonstrate they are promoting equitable outcomes in all their spheres of influence: via hiring and retention, using diverse suppliers, or marketing products for users of differing abilities.[2] And our data tells us that high-growth brands (defined as those with annual revenue growth of 10% or more) are more frequently establishing key performance metrics for diversity, equity, and inclusion (DEI) objectives than their lower-growth competitors.

FIGURE 1

Younger generations more often notice representative advertising at the time of purchase consideration

■ 18–25 years ■ 46+ years

	Auto	Travel	Apparel and footwear	Beauty and personal care	Household equipment	Furniture	Electronics	Banking products and services
18–25 years	35%	32%	23%	28%	30%	30%	23%	31%
46+ years	18%	17%	11%	10%	13%	14%	14%	17%

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

Resonating with authenticity

These findings reflect the contours of a changing society. New US Census data shows that in the past decade, the white population has declined for the first time in history, and people who identify as multiracial, Hispanic, and Asian are driving much of the population growth.[3] A 2021 Gallup poll highlights that LGBTQ identity has risen from 3.5% in 2012 to 5.6% in 2020—and includes one in six among Generation Z (ages 16 to 26 in 2021).[4] And the World Health Organization reports that globally, 15% of the population lives with a disability—a category of consumers that is rarely featured in representative advertising.[5]

Many of these developments should inform the way brands speak to younger consumers, especially Gen Z. Overwhelmingly, 94% of that generation expects companies to take a stand on important social issues, and 90% say they are more willing to purchase products that they deem beneficial to society.[6] But creating loyalty within Gen Z also requires authenticity; these younger consumers will notice if brands aren't making a genuine, holistic effort to live those DEI values.

As it happens, committing to battling social inequities and championing DEI also ends up being a gateway to growth. In our survey of over 1,000 global executives, we found that the highest-growing brands are committed to achieving equitable outcomes across *all* their areas of influence—**workforce, marketplace, and society**—in ways their lower-growth peers are not.[7] They measure their DEI efforts more holistically and do it more often in almost all areas (compared with low-growth organizations), with a statistically significant difference in four dimensions: talent acquisition, talent retention, brand messaging, and community investments (figure 2).

Our data tells us that high-growth brands (defined as those with annual revenue growth of 10% or more) are more frequently establishing key performance metrics for diversity, equity, and inclusion (DEI) objectives than their lower-growth competitors.
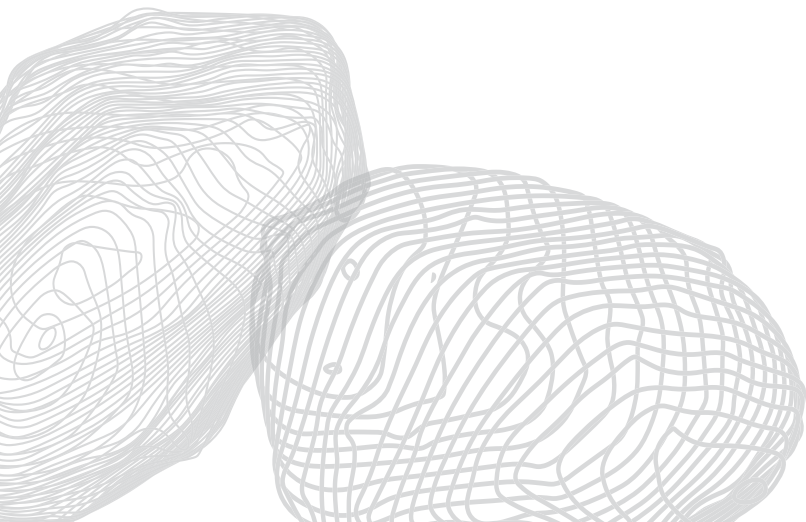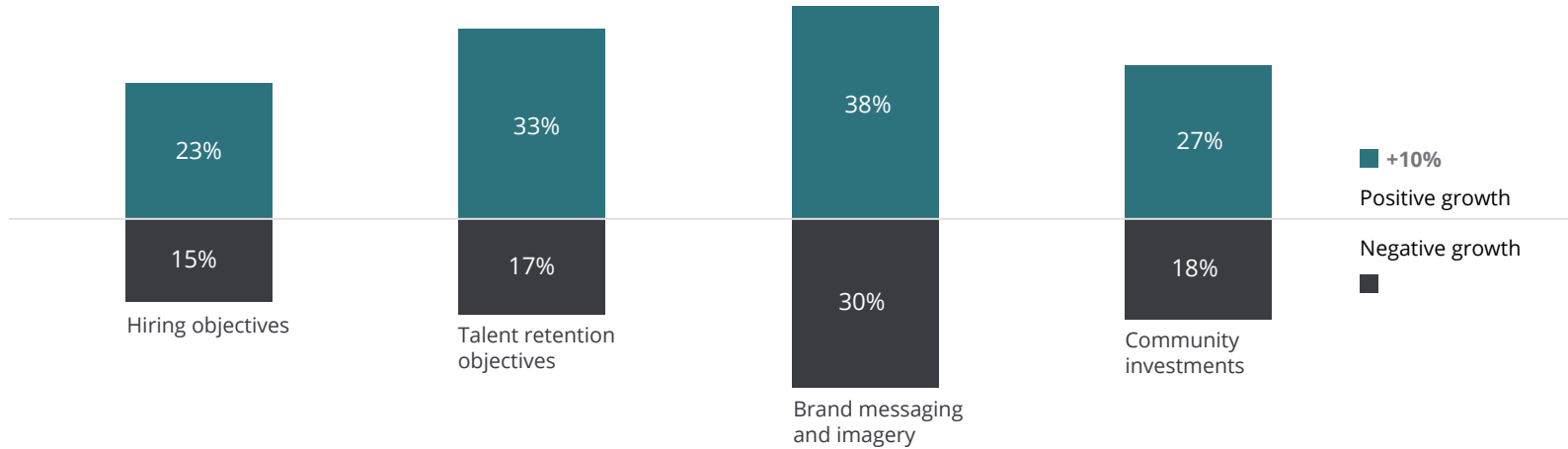
FIGURE 2

Where high-growth brands are measuring diversity, equity, and inclusion initiatives

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

For instance, 33% of high-growth organizations have established key performance metrics for diversity in talent retention, compared with only 17% of negative-growth organizations. And 23% of these high-growth organizations have established ways to measure diversity in their hiring, while only 15% of negative-growth organizations have done so.

There were similar differences for external endeavors: 27% of high-growth organizations have established equity metrics for community investments (versus 18% for negative-growth organizations); and 38% of high-growth organizations have established similar metrics for their brand messaging campaigns (versus 30% for negative-growth organizations).

Luckily for marketers, they most likely already have a champion in the C-suite. According to the *2021 Fortune/Deloitte CEO Survey*, 94% of CEOs indicated that DEI was a personal strategic priority, and 90% agreed that their organization aspired to be a leader on the topic.[8]

How marketers can elevate equity—inside and out

Essentially, consumers want to support brands that represent them *and* their values. And organizations that have made DEI efforts a core priority also recognize that it's just as important to feature representation in front of the camera as it is behind the scenes.

How can marketers do this? There are multiple ways across an organization's ecosystem, of which we've highlighted three:

- **Ensure teams and suppliers reflect your market.**
  Teams—both internal and external—that closely reflect the markets they serve can reduce the cultural and demographic distance between the brand and the consumers they aspire to reach. "It's not just who we hire internally, but who we work with," says Marissa Solis, senior vice president of portfolio marketing, partnerships, and media at Frito Lay. "We want to make sure we're working with a diverse array of content creators, agencies, directors, and producers to influence the industry and be culturally relevant in how we convey those messages—in an authentic way."[9]

- **Bring diverse voices back to the organization.** As chief marketing officers are often the first line to the customer, they should use that position of influence to continuously monitor and bring the needs of underrepresented communities to their organization—and feature those voices and faces in campaigns.

For instance, global beauty and personal care brand Avon surveyed 8,000 women across the globe to understand what issues were impacting them most during the pandemic. When Avon found that 41% lost confidence during the pandemic, it partnered with models of various races, ethnicities, and abilities to drive awareness on its "My Story Matters" platform—a space to give women a chance to share their authentic, unedited stories.[10]

- **Make your commitments measurable.** Ultimately, no amount of messaging can help a brand overcome the hurdle of being labeled disingenuous. One way to solve for this is to make sure your DEI goals are not just checking a box but creating real, measurable outcomes.

For Laura Curtis Ferrera, global chief marketing officer of Scotiabank, artificial intelligence (AI) helps to audit messaging and ensure there is always accountability. "We're really investing in representation—inclusion by design—at all levels," she says. "We tried to do it manually, but it's really time-consuming and you may miss things. And when you add a human, you add bias to the process. So now we do it using AI; then we have someone whose actual job title is around managing the inclusion-by-design mandate."[11]

In the end, future generations and growing populations of diverse communities are expecting more. Simultaneously, the highest-growing brands are reducing the cultural and demographic distance between the makeup of their teams and the markets they aspire to reach. Marketers can help their organizations not only hone their messaging but also support a company's transformation to a more equitable, diverse, and inclusive organization, thereby underpinning their brand messaging with authenticity.

About the research

The **Global Marketing Trends Executive Survey** polled 1,099 C-suite executives from global companies located in the United States, France, Japan, the United Kingdom, and the Netherlands in April 2021. This survey asked chief executive, marketing, information, finance, operating, legal, and human resource officers their thoughts on a variety of topics driving the evolution of the marketing function.

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See the **introduction** to learn more about both studies.

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8. Deloitte, *2021 Fortune/Deloitte CEO Survey*, 2021.

9. Sourced from Deloitte interviews conducted between May and August of 2021 as part of the research for the 2022 *Global Marketing Trends*.

10. Jenny Fieldgate, "'We landed on two inspirational women who were perfect'—Behind the campaign, Avon My Story Matters," *PRWeek*, July 6, 2021.

11. Deloitte *Global Marketing Trends* interviews.

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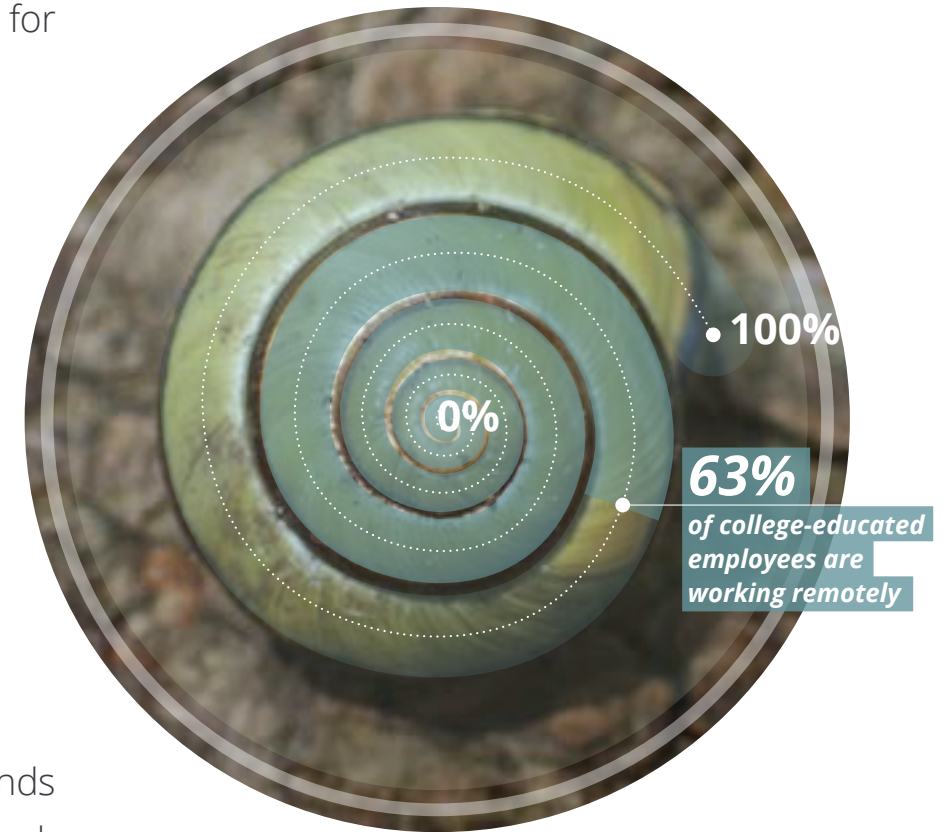
Building the intelligent creative engine

How unconventional talent strategies connect marketing to the customer
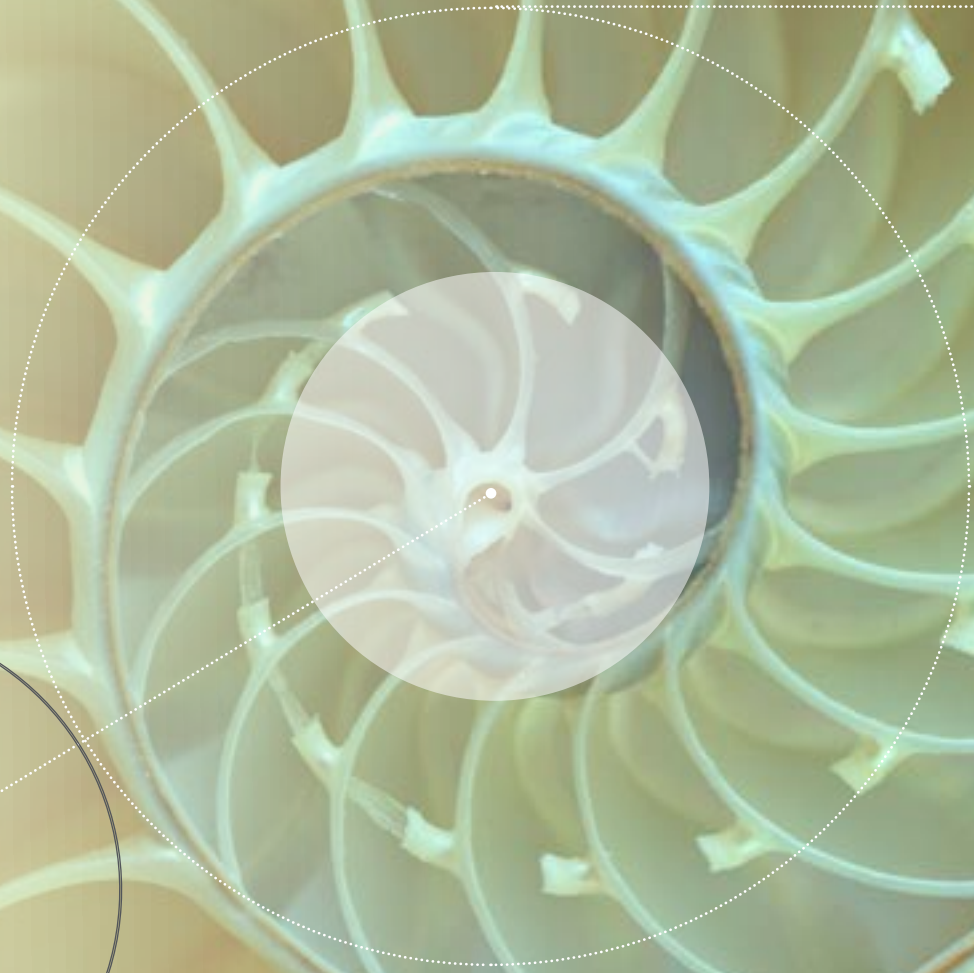
As data becomes more important to customer strategies, marketers are gravitating toward hiring people with more analytical skills. How do new marketing talent strategies enable this shift—while retaining the creative part?

Marketing was once pegged as a field for creatives, but the rise in big data and artificial intelligence has changed the demands of the profession. Now, marketers aim to uncover the most nuanced insights about their customers and connect brand messages to those moments in their daily lives. Similarly, there's a growing expectation that marketers can bring these insights back into the organization to help inform everything from purpose to customer data strategies (see our trends "**Purpose—A beacon for growth**" and "**Designing a human-first data experience**" to learn more).

100%

0%

63%
of college-educated employees are working remotely

In this more data-intensive environment, we already see marketers gravitating toward hiring more analytical skills. When we surveyed 556 global chief marketing officers (CMOs) and asked them to identify the top skills of their highest performers, analytical expertise edged out creative skills in almost every industry, with the exception of the consumer industry— something that would be almost unheard of 10 years ago (figure 1).

Meghan Nameth, senior vice president of marketing at Loblaw Companies Limited, Canada's leading food and pharmacy retailer, explains why these more analytical skill sets are rising in importance: "Our sources of creativity and our paradigms around where creative thinking comes from are shifting. Some of the most creative people I've ever worked with are data scientists. That might be surprising given I've worked with some amazing agencies and creative partners. But part of what really great data scientists do is they make lateral connections between what looks like disparate points of information."[1]

But make no mistake, this isn't a one-to-one swap of creative skills for analytical and technical skills. Instead, it's about convening data scientists, strategists, programmers, and creatives together to make the whole greater than the sum of its parts—which isn't always the easiest or most straightforward endeavor.

FIGURE 1

Chief marketing officers often identify analytical expertise as a more important skill than creative expertise

Chief marketing officers who identified analytical and creative expertise as top skills

■ Analytical expertise   ■ Creative expertise
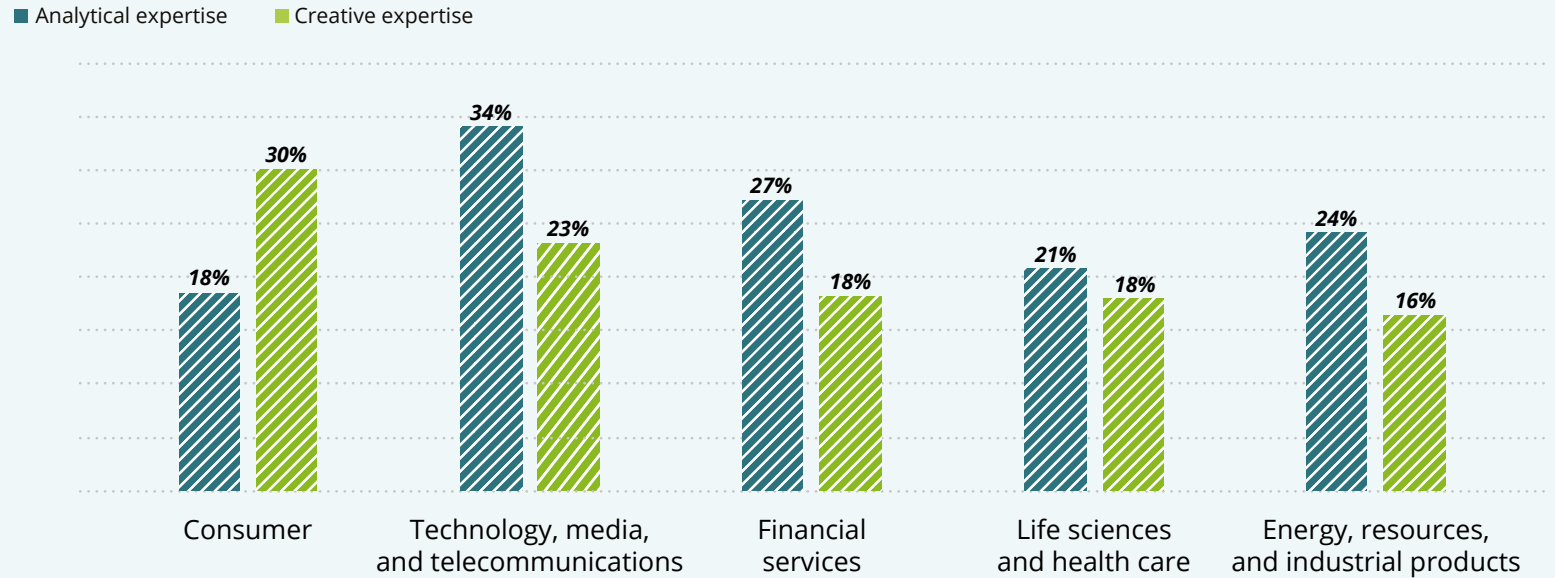
Source: Deloitte Global Marketing Trends Executive Survey, April 2021.
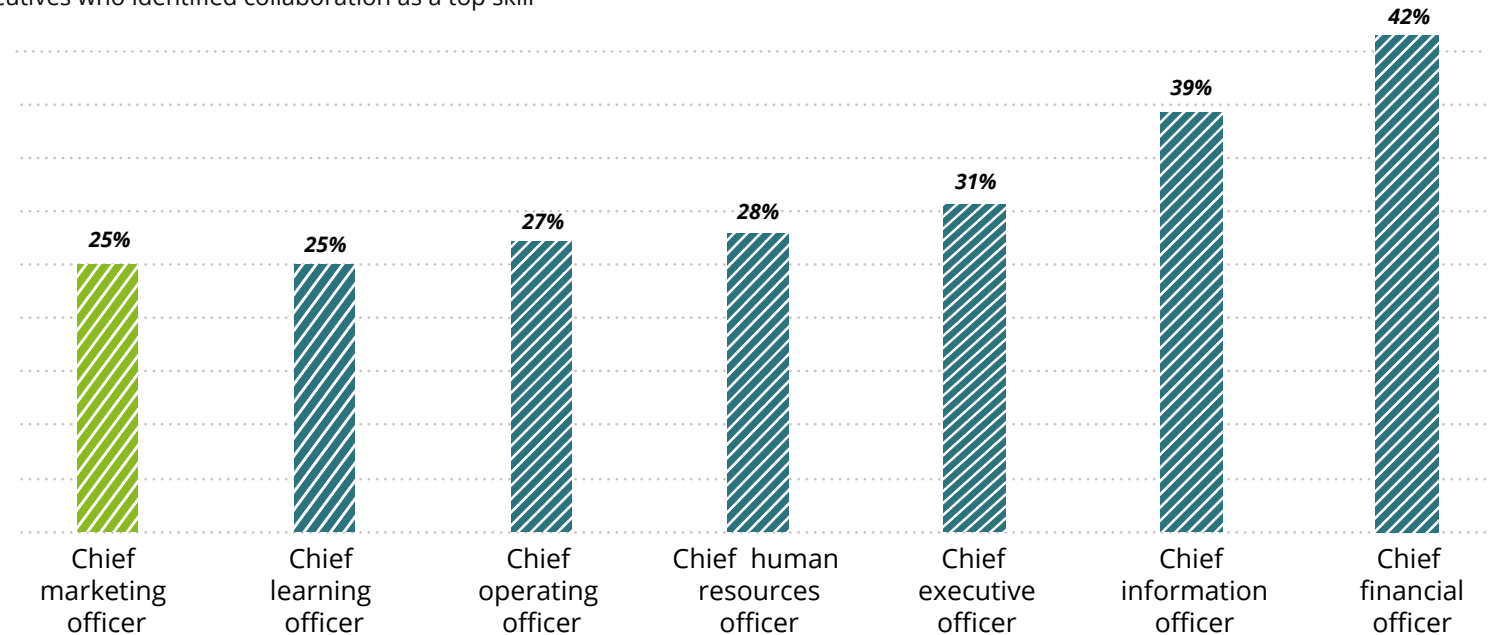
Shifting to a more collaborative mindset

At its core, bringing these skills together will require greater collaboration. However, this too will likely require a mindset shift for most CMOs, who may be more used to working on a linear production schedule. This is especially true when comparing CMOs with their executive peers: While other executives routinely identified collaboration as a top skill, the CMOs prioritized it lower than the rest of the C-suite did (figure 2).

With the goal of getting ever closer to the customer, collaboration, both internally and externally, can be key to building a creative engine that moves at the speed of culture. In this spirit, we discuss how marketers can design more agile team structures and rethink external relationships, such as influencer strategies, to capture the most important customer insights and meet customers in the moments that matter.

FIGURE 2

Chief marketing officers prioritized collaboration lower than other C-suite roles did

Executives who identified collaboration as a top skill

Chief marketing officer	Chief learning officer	Chief operating officer	Chief human resources officer	Chief executive officer	Chief information officer	Chief financial officer
25%	25%	27%	28%	31%	39%	42%

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

Fueling intelligent creative with agile teams

Finding the right talent structure can be fatiguing. And every time an organization undergoes an organizational redesign that doesn't work, resistance for future change management initiatives can increase.

Instead of focusing on massive overhauls, the answer may be to make smaller, more agile changes that focus around a single objective. Nameth believes in taking an approach to organizational structure where different skills are brought together to solve a single problem:

> From a structural standpoint, it's really hard to teach lateral thinking; one way to compensate where you may not have that naturally is to build "pods," where you have a data science person, a data engineering team, graphic designers, and a demand gen[eration] team connected so that you get different thinking on one problem. If your objective is to attract more customers into your retail environment, what are all the signals or moments along the way that would shift their journey?[2]

For Loblaw, that objective, for instance, may be to understand the varying consideration points to entering its retail stores: "It may mean if [customers] are heading to a different store, reminding them through an advertisement that we have better pricing or intervening in digital when they're searching for a store location."[3]

Another complication is global consistency. Nanne Bos, the chief communications officer of Netherlands-based financial firm Aegon, says, "The most effective and future-proof approach to global marketing is not centralized nor decentralized, but about increasing coherence across markets—while allowing for flexibility." Bos indicates this can be achieved by "setting up a global design hub that allows a local customer experience team not only to download design elements but also to upload [them] so that other markets can use them as well."[4]

The agency and the influencer: Creative at the speed of culture

Agencies are often core to creative execution for many brands. But, as many agencies work with various clients, the work produced can sometimes feel more commoditized rather than bespoke.[5] Simultaneously, the social influencer has exploded as a "go-to" product spokesperson. And these individuals are closer to products—and customers—than almost anyone.

Brands don't have to myopically view social influencers just as product reviewers. Instead, they may be the next iteration of the creative agency. In fact, one entertainment company is now providing briefs to known influencers in their target demographics and asking them to assist in developing the creative content.[6] This means moving the relationship from "influencer" to "creator" and putting those individuals at the center of the brand to work on bigger-picture creative challenges. We saw this manifest organically with the social-influencer–driven "100 baby challenge" in Sims 4, where gamers competed against one another to see who could produce 100 digital babies the fastest.[7] In essence, influencers didn't just review products; they *influenced* user behavior. Brands can do the same by augmenting their brand-influencer relationships with challenges and creative briefs.

When Kjetil Undhjem, the head of marketing and brand strategy at Australian-based bank ANZ, discusses influencer strategies, he says, "You can't just pick [influencers] because they are famous; you have to pick one that has that interest and has that following, and then you can give them a fair bit of freedom in terms of how they create that content."[8] This means making sure they know the subject matter, such as financial well-being.
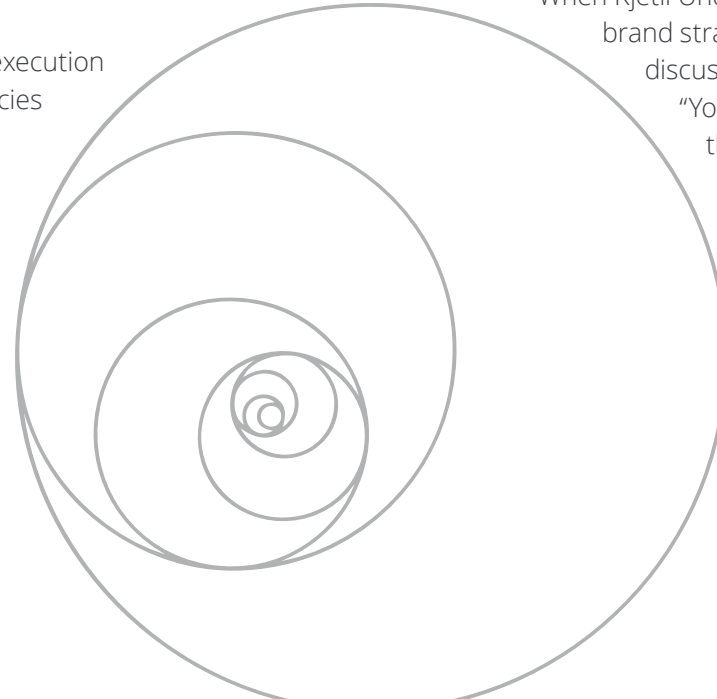
Further, in some regions such as China, the influencer marketing industry is years ahead of most of the world as influencer agencies are already on the rise.[9] Recently, global social media platform TikTok started hosting "creator camps" where influencers "provide strategic counsel to brands."[10]

Integrating a remote workforce to fill the skills gap

Even the best-designed teams need the proper backgrounds and skill sets to be successful. And with 63% of college-educated employees from our survey of 11,500 global respondents working remotely, marketers are confronted with both opportunities and considerations for making this digital-physical construct of work successful.

Broadening the aperture

Steve Carlile, the CMO of online cosmetics company Younique Products, has seen the rise in remote work permanently change how the brand sources talent—to the strategic advantage of the company. The benefits include gaining access to specialized skill sets, building a more diverse workforce, and, in many cases, bringing workers geographically closer to business partners and suppliers. As Carlile explains, "We were able to find the right talent, and, as we expanded the geographic scope, we were intentional about it."[11]

Based out of Utah, Younique was able to enhance its R&D and product marketing functions through the remote workforce. Further, with manufacturing partners based on the US East Coast and Europe, Younique hired a head of R&D "a stone's throw away from being able to plug in closely with our manufacturing partners." And in terms of diversity, while Utah has a relatively homogeneous population, Younique was able to cultivate a more representative talent base that better reflects the customers it serves—an increasingly important dimension when trying to be culturally relevant.

Optimizing hybrid

While remote work will carry on, hybrid brings a new element to consider. Bill Beck, the CMO of health insurance company Anthem, sees the power of bringing key portions of strategic work together for in-person collaboration. For instance, when Anthem was designing a new creative platform, Beck recognizes the moment the team came together to think through the execution of the platform as a key turning point in the project's development. Beck notes, "It just reminds me of the importance of being together. Especially as a marketer, the face-to-face collaboration from a creative aspect is where we're going with hybrid."[12]

For the CMO, it's less about organizational redesigns and more about a cultural shift—one that reshapes how marketers work toward common goals that unlock compelling creative.

About the research

The **Global Marketing Trends Executive Survey** polled 1,099 C-suite executives from global companies located in the United States, France, Japan, the United Kingdom, and the Netherlands in April 2021. This survey asked chief executive, marketing, information, finance, operating, legal, and human resource officers their thoughts on a variety of topics driving the evolution of the marketing function.

The **Global Marketing Trends Consumer Survey** polled 11,500 global consumers, ages 18 and above, in May 2021 across 19 countries.

See the **introduction** to learn more about both studies.

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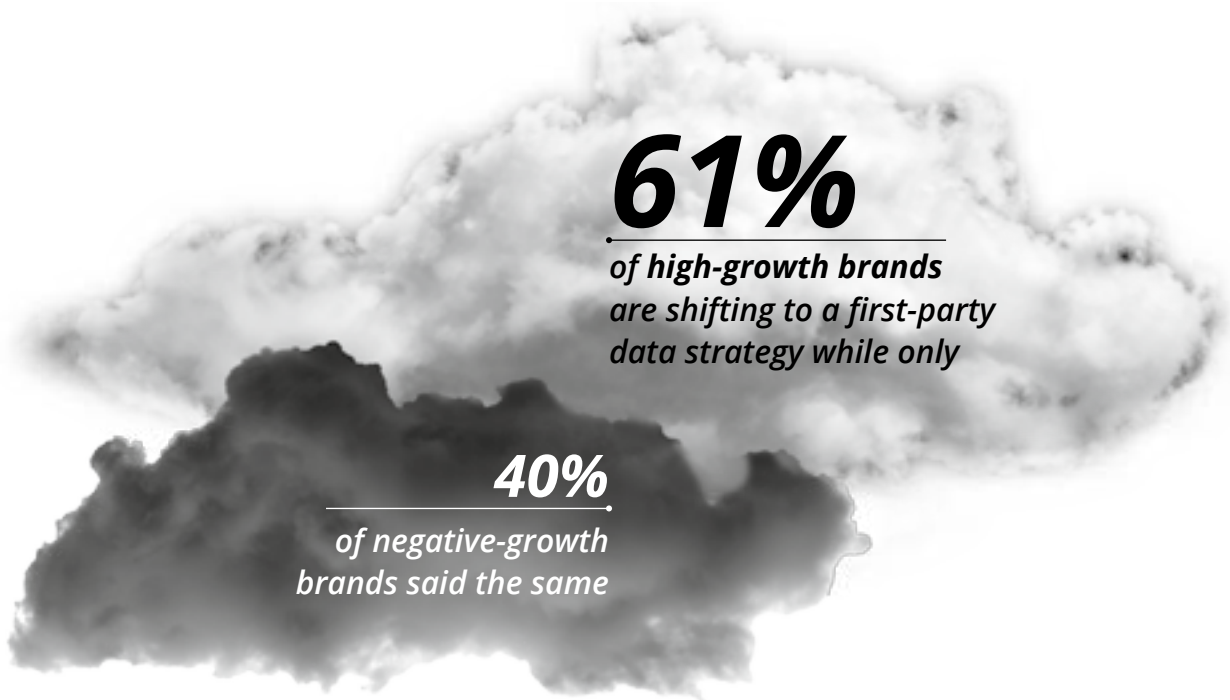
Meeting customers in a cookieless world

How growth leaders are rethinking first-party data strategies

With third-party cookies systematically disappearing, how can marketing organizations use other data strategies to effectively target and engage with their customers?

Over the past decade, marketers have been experimenting in the digital world to strengthen brand-customer relationships. For example, a proliferation of social channels has altered how marketers interact with their customers in both the business-to-consumer and business-to-business spaces.[1] In tandem, advances in big data and artificial intelligence (AI) have allowed marketers to better target and message customers—and as importantly, measure the effectiveness of those approaches. Fundamental to these advances are third-party cookies (data captured and used from third-party sites).[2]

61%
of high-growth brands are shifting to a first-party data strategy while only

40%
of negative-growth brands said the same

Now the pendulum is swinging the other direction, toward data privacy: While consumers may appreciate relevant ads, they also have concerns about how their personal information, purchase preferences, and browsing habits are being used (see our trend "**Designing a human-first data experience**" to learn more). In response, regulations have tightened, and many web browsers and tech companies are disabling third-party cookies—with additional changes and restrictions anticipated down the line.

The phasing out of third-party cookies can hinder marketers' ability to effectively engage with customers in myriad ways, including finding quality prospects, re-engaging customers who have considered a brand's products but possibly moved away ("plugging the leaky funnel"), and measuring the effectiveness of digital ad campaigns.

As marketing organizations try to keep up with these changes in sentiment and regulation while continuing to deliver relevant campaigns to consumers, pivoting toward using first-party data in combination with digitalization could help them continue their strategic initiatives.

In an effort to help marketers rethink their own data strategies, we look at insights from our survey of more than 1,000 global executives to explore how high-growth brands (defined by those with at least 10% growth over the past year) are both getting ahead of this ever-evolving data landscape and deploying first-party use cases more strategically than their lower-growth peers.
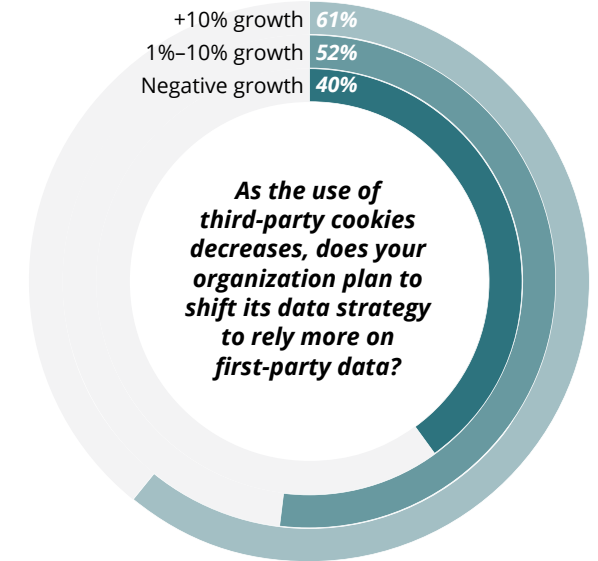
First to the first-party data party

Significantly, high-growth brands are taking the lead in the shift to a first-party data environment. In fact, results from our executive survey reveal that 61% of high-growth companies are shifting to a first-party data strategy, while only 40% of negative-growth companies say the same (figure 1). This may signal that high-growth organizations more often recognize the pressing need to get ahead of a rapidly changing environment.

And getting ahead of this changing landscape is exactly what VMware, a global business-to-business technology company is doing. Chief marketing officer (CMO) Carol Carpenter highlights how VMware is taking a "more globally consistent approach that is above and beyond the rules and regulations" to give customers more agency with their data.[3] Not only can this provide greater consistency across regions, it also helps prepare VMware for a cookieless world.

High-growth brands lead in the development of first-party data strategies

+10% growth **61%**
1%–10% growth **52%**
Negative growth **40%**

As the use of third-party cookies decreases, does your organization plan to shift its data strategy to rely more on first-party data?
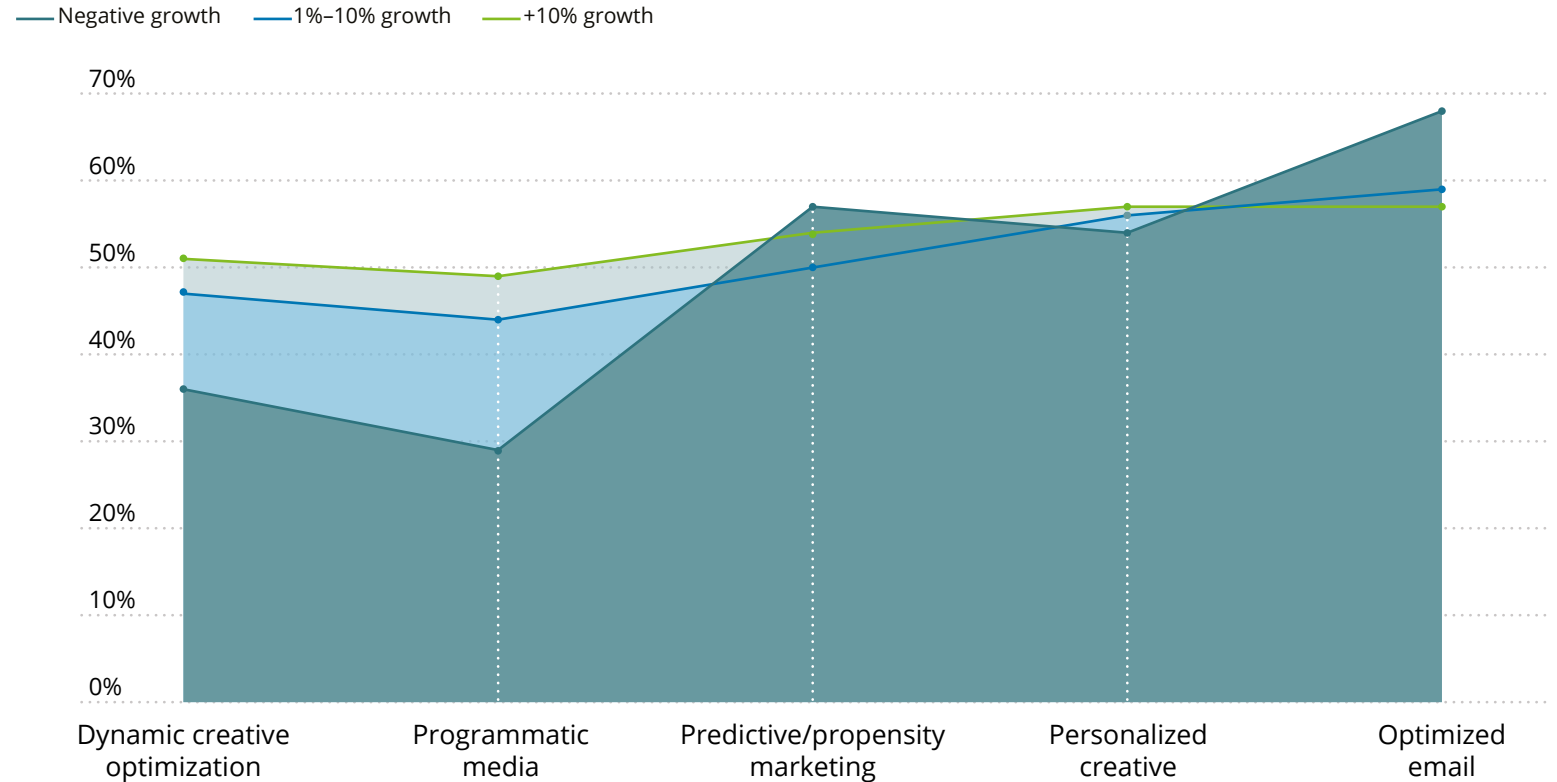
Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

CMOs from high-growth brands are also well ahead of negative-growth brands in deploying first-party data in more sophisticated ways, specifically in two key areas: delivering personalized content via dynamic creative optimization (51% vs. 36%), and using data to serve ads to users via programmatic media (49% vs. 29%). Alternatively, negative-growth brands are more focused on using first-party data in more traditional ways such as optimized email (68%) and predictive/propensity marketing (57%)—though, not significantly more than the rest of the field (figure 2).

FIGURE 2

Chief marketing officers from high-growth brands use first-party data in more sophisticated ways

First-party data marketing use cases

Negative growth   1%–10% growth   +10% growth

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

Follow the (growth) leaders

Going down this path of reimagined data usage can come with its share of evolving challenges. However, whether your brand is just getting started or preparing to deploy first-party data in more sophisticated ways, every organization needs to start somewhere.

Push the data reset button

As we observed with many negative-growth brands, optimizing emails is a natural starting point because it's often fueled directly by first-party data. However, designing a more encompassing and longer-term first-party strategy typically requires a more holistic view of your data infrastructure—and, in many cases, a complete rethinking of both the technical and operational environments.

For organizations overhauling their customer data approach, this could mean:

- **Determining your reliance on third-party cookies.** It's important to develop a clear picture of how you're reaching and messaging customers in the digital sphere and assessing how many of your customer interactions rely upon third-party cookies.

One option is to deploy a "cookie calculator" to gain visibility into where the organization relies most on third-party cookies.

- **Creating new data infrastructure.** To accommodate your first-party data collection, it's imperative to establish sufficient infrastructure, such as a comprehensive consumer data platform (CDP), that can help connect various data sources throughout the customer journey.

A clear understanding of these risks, opportunities, and priorities can help lay a foundation to build upon—which is when the fun of experimentation can begin.

Try and try again

Although it appears to be a challenge, the dissolution of third-party cookies also offers an opportunity for companies and brands to experiment with developing relationships with key customers. As we observed with high-growth brands, some companies are experimenting a lot, whether on dynamic creative optimization, programmatic media, or propensity marketing. With this in mind, marketers should consider three key actions to help ensure success when implementing a first-party data strategy:
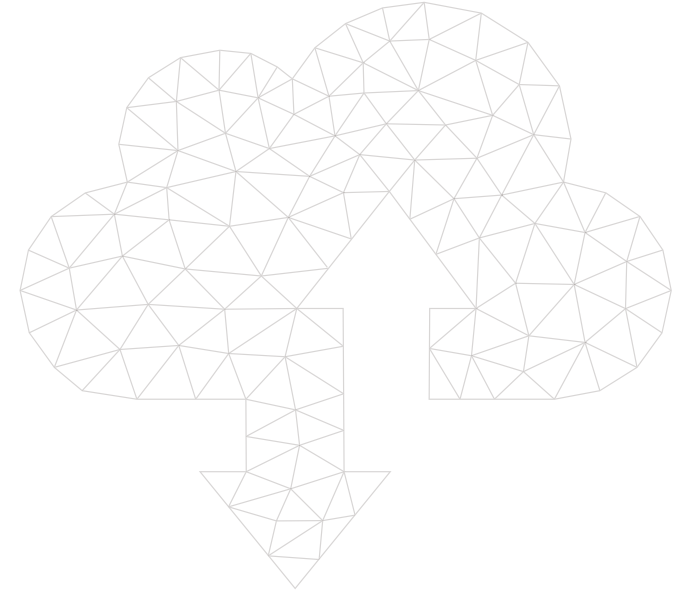
- **Cultivate unique first-party data through greater consumer value.** Marketers who focus on developing first-party data for their brands can create more opportunities to reach those customers by cultivating unique data insights and long-term measurement. One way to do this is by offering *value* in exchange for data. "Creating an ecosystem of services in which the richness of the customer experience improves as more complete data profiles are built or allowed by the customer may be an approach to address the issue," says Mack Turner, former research executive at Bank of America.[4] This can be achieved through customer-value initiatives such as loyalty programs, AI web assistants, or gamification.

> Whether your brand is just getting started or preparing to deploy first-party data in more sophisticated ways, every organization needs to start somewhere.

- **Build deeper relationships with ecosystem partners.** To grow their first-party data, marketers may need to look outside their walls. Tech giants and media publishers have enormous amounts of their own first-party data; so, to bolster data development internally, marketers should look to strengthen relationships with such partners to gain access to their walled gardens of data and corresponding insights.

- **Rethink your analytics.** Without third-party cookies, prospecting and retargeting will most likely become less individualized. However, to establish, maintain, and deepen customer relationships, companies should reimagine how they use analytics and targeting. For example, technology and platform companies are already proposing to shift the focus

from individuals to cohorts—groups of people with similar interests, such as soccer fans or knitters—which aims to give marketers a way to target ads to groups without requiring details of individual users.

While marketers prioritize and experiment, the process of determining success will most likely take a multichannel measurement approach that blends insights from a CDP, cohort analytics, and deeper relationships with ecosystem partners.

There will likely be more speed bumps in the road, but, ultimately, a shift to first-party data can lead companies toward a better understanding of their customer journey. So, continue experimenting, measuring, and improving—and buckle up!

About the research

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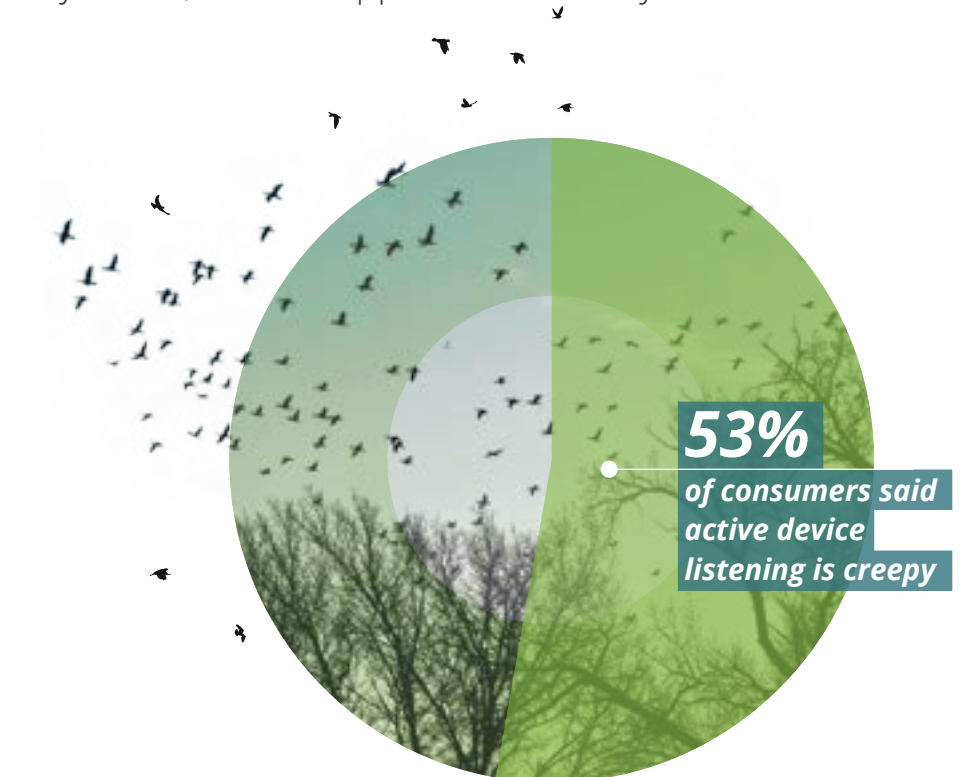
Designing a human-first data experience

Interacting with customers—
and their data—to foster trust
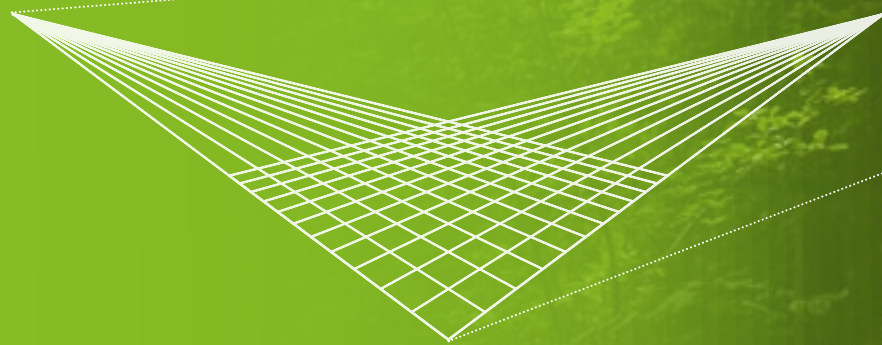
Marketing has traditionally used detailed customer data to improve the customer experience. But with pushback on data tracking, can the security function work with marketing to deepen customer trust?

When you download a shopping app and consent to the privacy policy, the company behind the icon on your screen can learn a lot about you. It can know where you bank, what you tend to buy online, and the approximate hour you normally browse.

53%
of consumers said active device listening is creepy

Marketers devour these morsels of information. But there's a delicate balance between helpfulness and overuse when it comes to consumer data. Geo-tracking, device listening, and third-party cookie-based recommendations can create an unsettling feeling that smart technology is not just inquisitive—it's intrusive (see our trend "**Meeting customers in a cookieless world**" to learn more). As a result, people are increasingly rebelling against the idea of brands following their every move.

At the same time, this abundance of customer data can create a paradox within the organization. Cyber teams led by the chief information security officer (CISO) work to protect personal data and adhere to privacy regulations. Meanwhile, their marketing peers seek this same information in the hopes of creating better customer experiences.

So, how can the chief marketing officer (CMO) and the CISO work together to use this data appropriately and build consumer trust?

To learn more, we polled 11,500 global consumers from 19 countries. The responses help us better understand the balance between people finding the use of their data *helpful* and, well, *creepy*.

Relationships first

To explore how the use of personal information can build or erode trust, we examined how consumers perceive specific data interactions, while taking into account the consumer's relationship with the brand.

In our survey, we presented 10 brand interactions that use customer data and asked respondents to rate the interaction on a scale of *creepy* to *helpful*. These ratings were then used to create a "net helpful score"—by taking the difference between those who agreed the interaction would be helpful, and those who indicated it would be creepy (we did not include the neutral responses; see figure 1).

For instance, 68% of respondents said they found it helpful when a brand they regularly shopped with provided them alerts when items go on sale. In comparison, 11% found these alerts creepy, garnering a net helpful score of 57% (the highest score). At the other end of the spectrum, people reacted negatively when it appeared their device was listening to them—for example, you're chatting with a friend about your caffeine craving, and a coffee ad shows up in your social media feed. In this case, 26% suggested this interaction was helpful, while 53% indicated the interaction was creepy (for our lowest net helpful score of -27%).
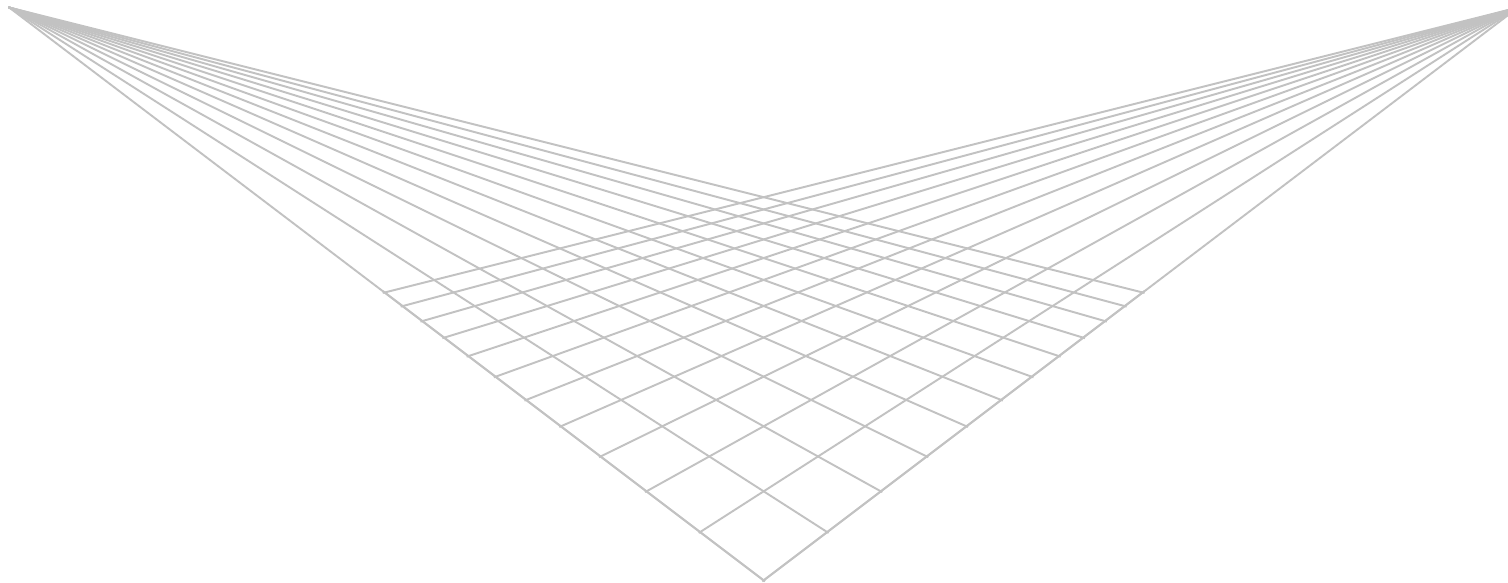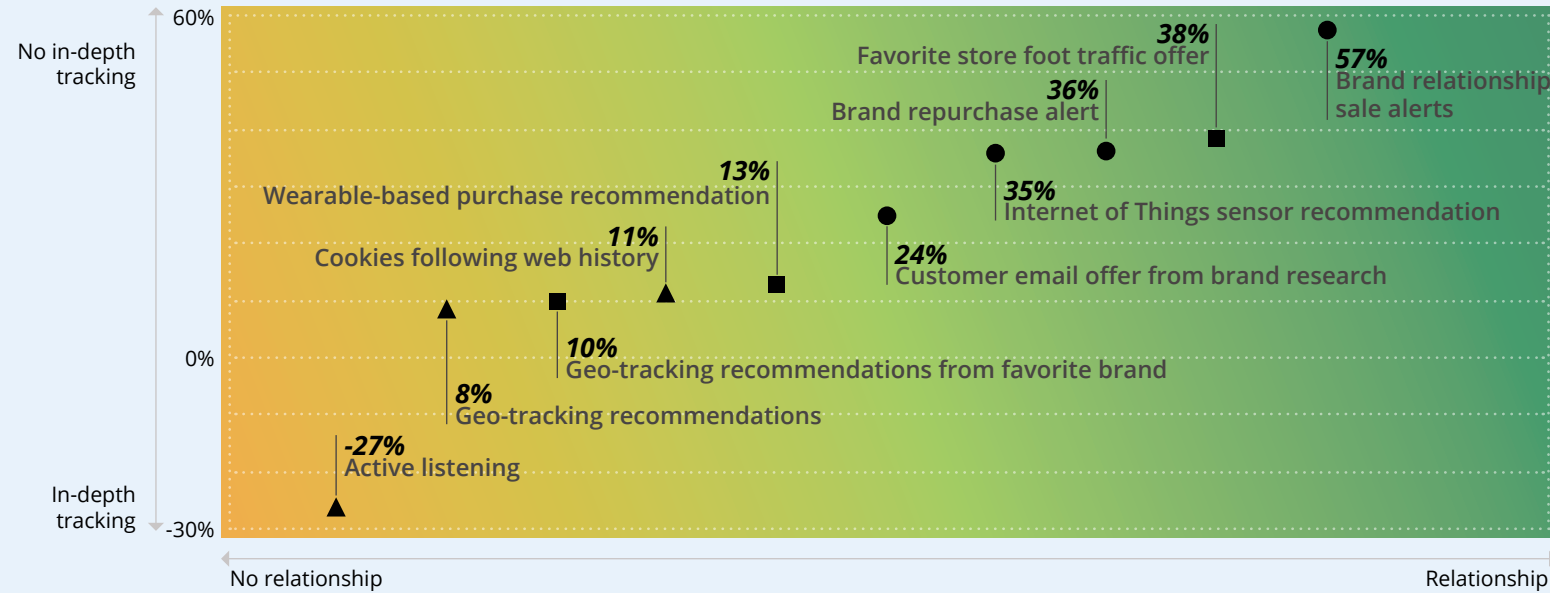
FIGURE 1

Customers rate brand interactions as helpful based on the level of tracking and relationship status with the brand

Net helpfulness score

● Established relationship ■ Established relationship with in-depth tracking ▲ In-depth tracking only—no relationship

Across all scenarios, we noted some patterns:

- **Established relationships are essential.** To some extent or another, we're all being digitally monitored. But when we presented scenarios involving third-party cookies, geo-tracking, or device listening, consumers almost universally scored them lower than the scenarios that did not involve these in-depth tracking methods. Scores for these scenarios were especially low if we did not explicitly mention that the consumer had some type of relationship with the brand (for example, purchased from the brand before or provided the brand with an email address).

  On the other hand, almost every one of our scenarios that were grounded in brand relationships—and shied away from in-depth tracking—were ranked by customers as the most helpful interactions. These relationships included some customer benefit such as a special offer or timely repurchase reminder. The fact that these scenarios did not include in-depth tracking signals the importance of customer agency. In other words, these scenarios deploy data on the customer's terms.

- **Implementing in-depth tracking is a balancing act— even with an established relationship.** While in-depth tracking scenarios with an established relationship received generally more positive responses than those without one, they are still a tier below *not using in-depth tracking at all*. Of our three scenarios that combined established relationships with in-depth tracking, only one—providing a digital offer to customers while they browse aisles at their favorite store (38% net helpful score)—performed similarly to the "established relationship" scenarios.

Taken together, we see that cultivating strong relationships starts with building trust and providing helpful data experiences that provide value—and agency—to consumers.

A recipe for cultivating trust: Transparency, value, and security

Since trust is so important to building strong customer relationships, how can brands do this well? One way is by breaking trust into actionable components.

The power—and value—of intent

Recently, we studied 7,500 consumers and employees to better understand what drives trust and, as importantly, how trust predicts future behavior. This analysis indicated that four signals formed the basis of trust: humanity, transparency, reliability, and capability (see our article on **trust in the consumer industry** to learn more).[1]

When it comes to trusted data experiences, transparency and humanity are the most important. In fact, when brands demonstrate transparency and humanity, customers are 2.5 times more likely to provide personal information that helps improve the product, and 1.7 times more likely to feel they have received more value than expected.[2]

Chris Stamper, president of Sixteen Mile Strategy Group and former CMO of a top North American bank, sees similar themes coming to market: "Transparency and engagement with the customer on how you plan to use the data is critical … The second lens is value demonstration, which is how you help inform the customer of value creation and let the customer opt in and opt out of the things you're delivering."[3]

Almost every one of our scenarios that were grounded in brand relationships—and shied away from in-depth tracking—were ranked by customers as the most helpful interactions.

Competency: Where cyber helps brands keep the promises they make

Trust will erode if even the most transparent messages (with the best intentions) fall short of the promises brands make with their customers. In fact, customers who perceive brands as reliable and competent are 1.6 times more likely to provide the brand with their digital information.[4] Thus, another key enabler of trust involves brands demonstrating their competency in keeping customer data secure.

Brands also need to build trust across their own ranks—especially when C-suite leaders aren't used to working closely together toward that goal. This means not being territorial and saying that customer data security is another team's responsibility. As stewards of brand reputation, marketers can work closely with their cybersecurity leaders from the outset of the engagement.

Marissa Solis, senior vice president of portfolio marketing, partnerships, and media at Frito Lay, notes the shift taking place. While Solis acknowledges that a few years ago, cyber would not be top of mind when thinking about engagement strategies, much has changed, as "security is one of the table stakes to building consumer trust … The security piece, the information systems piece, or the technology piece is critical because they're setting the foundation of that infrastructure, so they work together with us as we're trying to paint the picture and the vision for that [consumer] engagement."[5]
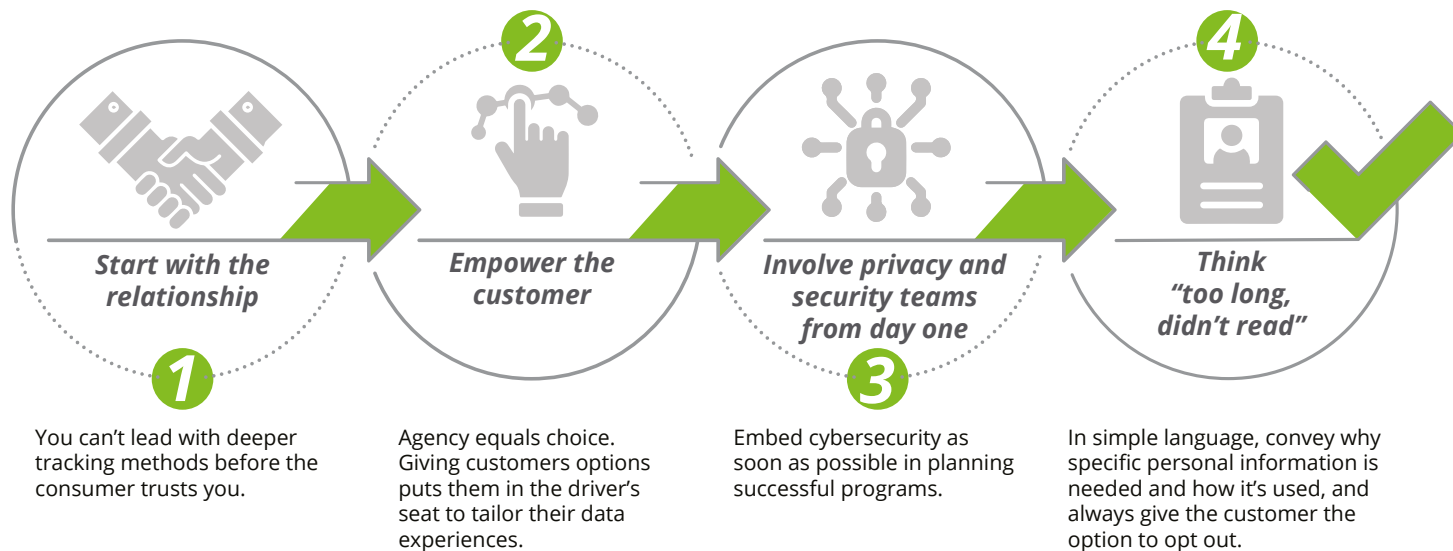
Together, a CMO and a CISO can understand the implications of data collection choices and work to minimize risks to the customer. For instance, if a shopping app is being developed by a third-party vendor, the CMO and CISO can work together to ensure that the app development includes comprehensive security assessments and testing so that the customer data remains protected.

Navigating the consumer privacy landscape is an increasingly difficult endeavor. Yet, we also know that using consumer data transparently and always with their needs in mind can lead to better decisions and more helpful brand relationships overall— absent the creepy factor. Building trust is hard. See figure 2 for tips on how to get started designing a human-first data experience.

FIGURE 2

Designing a human-first data experience

Four key considerations as organizations design their customer-first data experiences

1 *Start with the relationship*
You can't lead with deeper tracking methods before the consumer trusts you.

2 *Empower the customer*
Agency equals choice. Giving customers options puts them in the driver's seat to tailor their data experiences.

3 *Involve privacy and security teams from day one*
Embed cybersecurity as soon as possible in planning successful programs.

4 *Think "too long, didn't read"*
In simple language, convey why specific personal information is needed and how it's used, and always give the customer the option to opt out.

Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

About the research

The **Global Marketing Trends Executive Survey** polled 1,099 C-suite executives from global companies located in the United States, France, Japan, the United Kingdom, and the Netherlands in April 2021. This survey asked chief executive, marketing, information, finance, operating, legal, and human resource officers their thoughts on a variety of topics driving the evolution of the marketing function.

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See the **introduction** to learn more about both studies.

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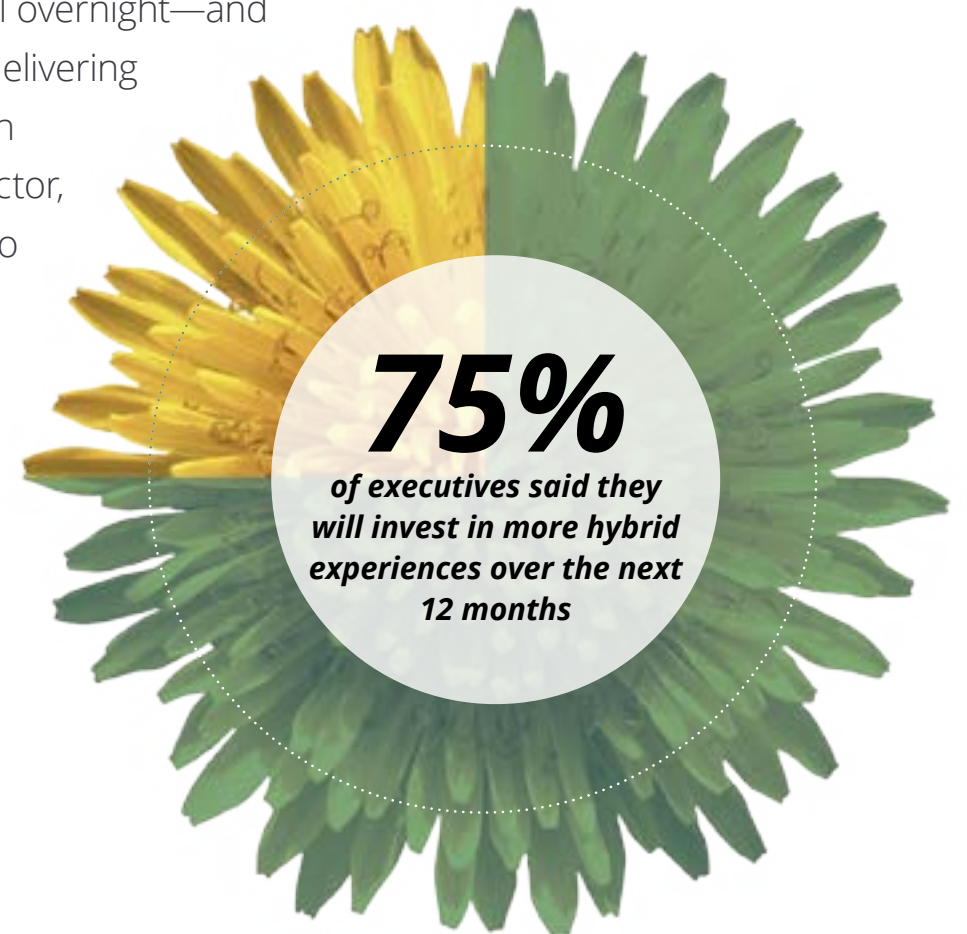
Elevating the hybrid experience

Human-centered design for our physical and digital environments
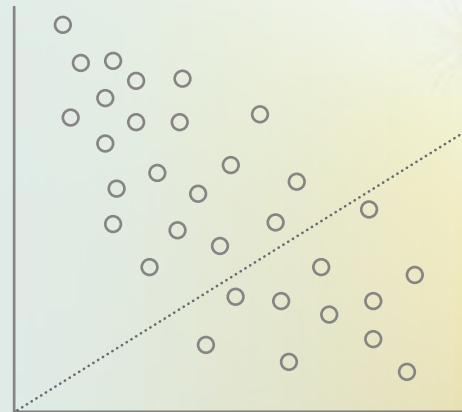
As brands deliver new digital experiences that meet changing customer preferences, the next step is to enhance hybrid customer experiences—and human-centered design can help.

Our lives went from physical to digital overnight—and amazingly, many brands excelled at delivering those digital experiences. Rather than people waiting weeks to see their doctor, telemedicine has empowered them to quickly schedule a 15-minute virtual appointment; numerous businesses have reaped the benefits of remote work and made it a permanent fixture (see our trend "**Building the intelligent creative engine**"); and e-commerce has exploded as the primary shopping method.

75%
of executives said they will invest in more hybrid experiences over the next 12 months

Now that brands seem more adept at digital delivery, the next challenge is to deliver the best of integrated physical and digital, or hybrid, experiences. In fact, when we surveyed over 1,000 global executives, 75% said they will invest more in delivering hybrid experiences over the next 12 months. As figure 1 shows, many executives are looking to hybrid to increase personalization (43%), innovation (43%), customer connection (40%), and inclusion (38%).

FIGURE 1

Why executives are investing in hybrid experiences

43%
To increase personalization of products/services
AND
To make offerings more innovative

40%
To help people feel more connected

38%
To offer more inclusive experiences
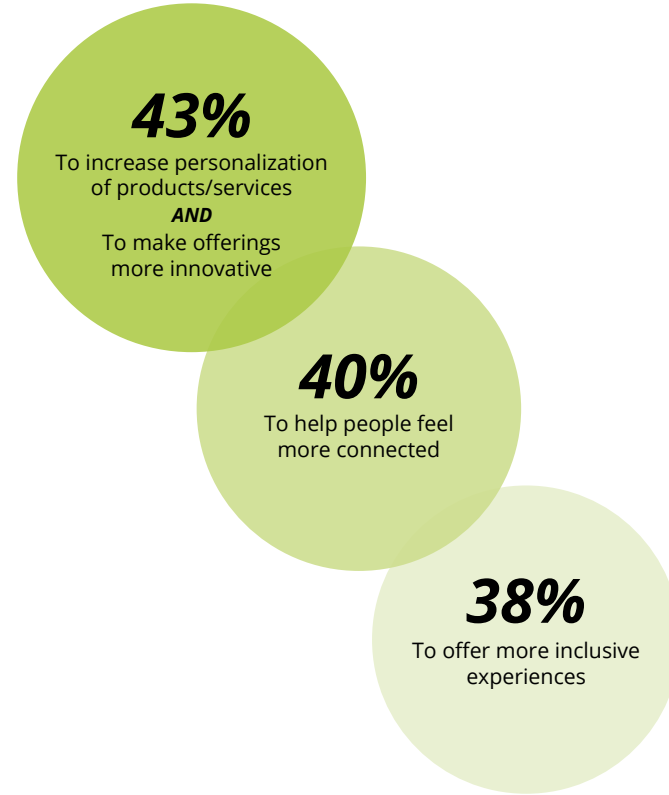
Source: Deloitte Global Marketing Trends Executive Survey, April 2021.

There are many challenges creating such an interconnected experience. If digital often exceeded expectations, people will expect no less from their hybrid experiences, and the proliferation of channels adds another layer of complexity. Moreover, creating great experiences often relies on analyzing consumer data, which becomes more difficult to obtain as people become more guarded in how their data is being used and third-party cookies are discontinued (see our trends "**Designing a human-first data experience**" and "**Meeting customers in a cookieless world**").

Elevating the hybrid experience with human-centered design

When it comes to combining the best of physical and digital experiences, we are already seeing there is no turning back: In university education, a majority of US students now would like both digital and in-person learning options,[1] and a majority of professors in Germany indicate that they want to maintain hybrid elements, such as in-person teaching augmented with "digital elements," after the pandemic subsides.[2] Another study highlights that almost 90% of patients in the United States would like to continue to use telemedicine for nonurgent issues, and over half said telemedicine allows them to see their doctor more easily.[3]

So, what's a brand to do? To meet the demand of elevating these experiences, it's best to start by putting the human at the forefront—and leading principles from human-centered design can help. By putting human needs at the center, involving select individuals as cocreators of the experience, and then rapidly innovating, brands can make their physical and digital experiences as agile and flexible as consumers have come to expect.

To help businesses elevate their hybrid experiences, we discuss how expanding choices, integrating feedback, and investing in the technological infrastructure can bring these design principles to life.

Enable choice through greater personalization

Understanding customers and meeting them in their preferred channel helps personalize their experience—and as importantly, engages the customer where they prefer to interact with the brand. For instance, in Deloitte's global survey of 11,500 individuals, we see younger generations gravitating to emerging channels—making purchases through social media, voice assistants, and virtual reality headsets—more often than older generations (figure 2).

Malorie Maddox, the chief marketing, communications, and strategy officer at Blue Cross and Blue Shield of Nebraska, says the health insurer is engaging with younger, more technologically proficient members through apps, social media, and streaming services. However, the insurer also continues to offer content via more traditional channels such as phone banks and face-to-

FIGURE 2

Younger generations are purchasing more often via emerging channels

■ 18–25 years   ■ 46+ years
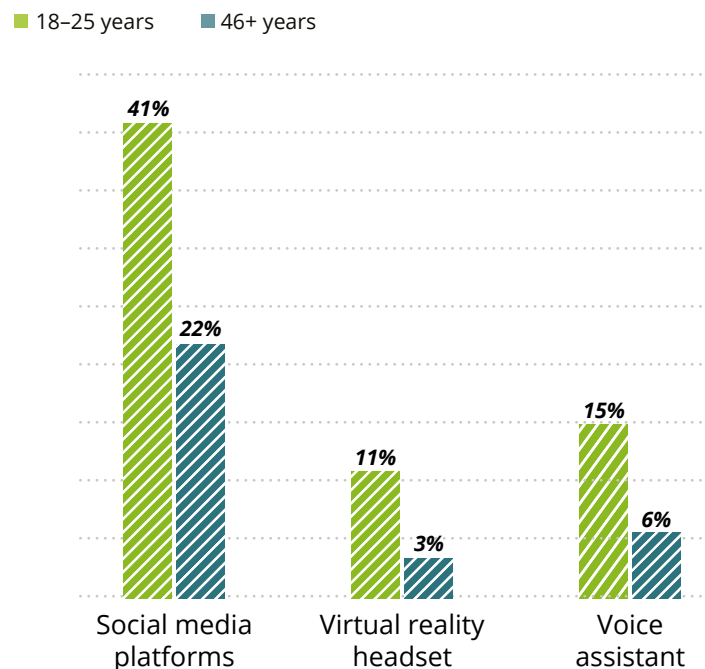
Source: Deloitte Global Marketing Trends Consumer Survey, May 2021.

face interactions, which are preferred by some of its Medicare Advantage and Medicare Supplement members. According to Maddox, success starts with "knowing your demographics. We know our counties inside and out. We can look at the health challenges the Nebraskans in each of those specific counties face…[and] we tailor our content to help them meet those challenges."[4]

Tailoring channels to customers also allows the brand to offer more inclusive experiences. As an example, one study found that 70% of sites are inaccessible to those with cognitive, visual, or hearing impairments.[5] But when channel strategies are expanded to other options, such as voice assistants, the brand can better meet different customer needs.

These physical and digital options can also be most helpful when they are built in collaboration with the end user. A few years ago, the UK–based supermarket chain, Sainsbury's, piloted an in-store shopping app, SmartShop. The original intention was to empower people to skip the line and do self-checkouts on a mobile device. However, Sainsbury's found that many customers still wanted the in-person checkout experience. Recognizing the moment as a learning opportunity, Sainsbury's conducted survey and ethnographic research to better personalize SmartShop (including testing usability for those of various abilities). In the next iteration, which launched during the pandemic, Sainsbury's looked to "supercharge the customer experience" by offering more personalized shopping lists (such as providing recommendations based on dietary profiles), better integrating customer loyalty programs, and incorporating more intuitive checkout options.[6]

Understand what *better* looks like through rapid feedback

While investment in hybrid starts with offering freedom of choice, gathering feedback helps refine those options. Analyzing behavioral data, apart from getting inputs for tailoring experiences, also helps brands directly understand from users what they *wish* existed.

Guy Flament, the global CEO of France-based beauty and personal care brand, Yves Rocher, explains how marrying omnichannel experiences with feedback mechanisms starts with identifying "what are the moments of truth where we want to make a difference with the consumer, because you cannot invest at the same level—with the same intensity—everywhere on the [customer] journey." Flament suggests those moments of truth are key places to implement feedback mechanisms, such as deploying net promoter scores across each channel after a new customer places their first order.[7]

For years, prospective startups deployed "fake doors" to gauge consumers' interest in products.[8] These took the form of product advertisements for nonexistent products—but if enough people clicked on the ad, the startup knew the idea just might have legs. Brands can implement similar feedback mechanisms in their digital and physical environments. When Knox Community Hospital wanted to understand if patients were satisfied with the timeliness of their appointments, it partnered with market research firm HappyOrNot to set up terminals across its campus

where patients could simply click if they were satisfied with the service.[9] This made it easier for both patients to provide feedback and the hospital to collect it and then enact change.

Moving forward, brands can deploy QR codes across their various channels to empower consumers to either provide feedback or, like the startup example, signal what channels or services they would like to have in the future.

Build the infrastructure for a cohesive experience

Enabling a hybrid experience also requires infrastructure to ensure every facet of the customer experience is connected and cohesive. As former chief marketing officer of Keds, Emily Culp, explains, "It's thinking about every touch point as chapters in a story. Each chapter should be able to stand on its own and captivate and immerse you ... Each chapter is special, but together, [they] tell a much fuller story."[10]

This starts with gaining a complete line of sight into the customer journey. As that line of sight gets fuzzier with the decline of third-party cookies, brands should invest in infrastructure that captures customer behavior and analyzes it across all touch points. One such example is cloud-based customer data platforms. These platforms capture omnichannel data to map the entire customer journey and empower brands to more clearly design the solutions for which their customers are explicitly or subtly asking.

Humans take the lead

While systems and infrastructure play a role in delivering hybrid, it still starts with humans. By tailoring experiences to meet consumer needs and empowering consumers with choices, brands can help ensure they are on the right path to elevating experience, even before they hard wire their systems.

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Supercharging customer service with AI

Reimagining AI strategies to unlock
a true end-to-end customer experience
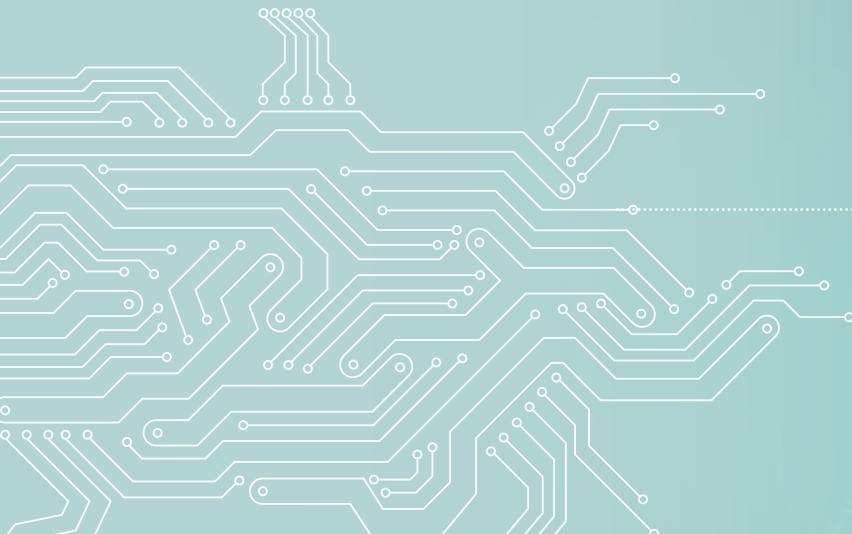
Artificial intelligence can integrate two marketing tactics—getting the right offers to customers at the right time and delivering great post-sales service—to make the customer experience even better.

For every brand, helping customers make purchase decisions by delivering on their needs is a top priority. But that's not as easy as it sounds. A surge in digital channels and hybrid online-offline journeys along with heightened customer expectations have complicated brands' desire to create and deliver a dynamic experience that equips customers with the right information and incentives—when they need it most.

The No. 1 most helpful tactic for spurring purchases:

Timely offers

Supercharging customer service with AI

Deloitte surveyed 11,500 global consumers to better understand what information they found most helpful while making purchase decisions across a variety of product and service categories. Two tactics stood out: timely offers and knowledgeable customer service (figure 1). In fact, across eight sectors, respondents cited a "timely offer" most often, with "knowledgeable customer service" as the second-most helpful option in six categories. These two dimensions routinely outperformed customized recommendations, free trials and samples, no-hassle returns and cancelation policies, and augmented technology (such as virtual showrooms).

Building on that feedback, brand marketers and customer experience leaders should be asking: How can we get the best offer in front of our customers—when they need it most—*and* equip service agents with the right information to offer those customers a level of service that helps them make the best purchase decisions?

We believe the answer is to optimize artificial intelligence (AI) within the customer experience—achieving harmony between human tasks and machine capabilities.[1]

Timely offers and knowledgeable customer service help lead to more purchases

Did any of the following help you make your purchase decision?

	Auto	Travel	Apparel & footwear	Beauty & personal care	Household equipment	Furniture	Electronics	Banking products & services
Timely offer	*37%*	*36%*	*36%*	*34%*	*41%*	*39%*	*40%*	*32%*
Knowledgeable customer service	*39%*	*31%*	*21%*	*21%*	*35%*	*34%*	*28%*	*34%*
No hassle return/ cancelation policy	20%	30%	23%	13%	26%	26%	22%	17%
Technology made it easier to learn more	31%	28%	13%	13%	28%	25%	29%	31%
Customized recommendations	26%	24%	14%	18%	22%	24%	19%	24%
Free trial/sample	21%	9%	7%	14%	7%	9%	7%	11%

Source: Deloitte Global Marketing Trends Consumer Survey, May 2021.

Designing a dynamic customer experience

A dynamic experience for customers means delivering the assistance and information they need, whenever, wherever, and however they want it. One prong of this is the utilization of AI that has enabled brands to deliver more personalized and creative marketing material and helped predict customer behavior. Designing and deploying an AI strategy that assists customers in their moment of need may be the most effective way to ensure the right offers meet customers at any point in their customer journeys.

However, AI isn't enough. For instance, a self-service chatbot without live service may convey to the customer that the company prioritizes cost savings over helpfulness. That's where the human side of contact centers comes in.

Employing customer agents as part of a dynamic experience serves a twofold purpose for brands: It embeds humanity within their customer journey and creates an opportunity to expand the

We believe the answer is to optimize artificial intelligence (AI) within the customer experience—achieving harmony between human tasks and machine capabilities.

view of customer service beyond the point of sale. For instance, each customer interaction gives agents a captive audience to whom they can upsell. Our recent *contact center survey* found that more brands are viewing their contact centers as revenue generators rather than mere cost centers—and this is driving investment strategies for many businesses. In fact, the number of respondents who have revenue generation as their No. 1 strategic priority is projected to double over the next 24 months. (At the same time, cost reduction is expected to shrink by 32% over the same time period.)[2]

Promisingly, AI and contact center strategies don't need to be mutually exclusive.

Where the two tactics meet

Often, brands use AI solutions to focus on a particular piece of customer service, such as using data to identify timely offers. However, when AI is embedded with purpose and planning into critical parts of the *entire* experience—producing timely offers and providing relevant insights to contact centers—it can create a more holistic customer service solution.

So, instead of treating AI and contact centers as siloed investments, each with its narrow purpose, marketers should aim to create a more integrated

machine-human handoff to better serve customers and support employees.[3] What does that look like?

Ideally, brands would use AI to embed data insights throughout the customer journey to produce the most relevant offers. For an extra layer of personalization, AI can serve as an "agent-assist": When powered with human-centered design, AI can provide service representatives with relevant information as they serve customers to help the latter make the right decision.

Take a typical customer interaction from one global travel and hospitality company with a reputation for fantastic customer service.[4] AI and integrated data immediately let the service agent know the customer's travel itinerary, where they may have had trouble completing a booking on the site, what in-person experiences or outings they plan to attend during their travel, and—after addressing the customer's issue—provide a cross-sell or upsell opportunity, if appropriate.

While this company may be considered an early adopter, it will not be alone for long. Results from the contact center study show that 79% of contact center leaders plan to invest in greater AI capabilities in the next two years.[5]

Consider VMware, a global business-to-business technology company. From providing more tailored recommendations to customers around timely security updates to better equipping customer call center employees with clearer guidance, AI is changing how VMware holistically delivers on the customer experience. And chief marketing officer (CMO) Carol Carpenter makes a point that "it's meant to supplement our technical advisors and customer success folks, not replace them."[6]

Connecting the dots

Implementing a dynamic end-to-end strategy necessitates a real understanding of your current customer experience, including the opportunities to improve it.

To begin, brands should have a clear picture of their customers—perhaps employing a customer data platform that can integrate the vast amounts of data collected from disparate sources.

Next, marketers should look at how they're currently bringing data insights to life. And encouragingly, they don't need to be data scientists to bring these capabilities to their organization. Between more enterprise software-as-a-service platforms embedding AI capabilities directly into the product suite and cloud-based machine learning capabilities offered by multiple vendors, marketers can think less about the technology and more about the strategic application of it to transform a customer journey.[7]

Australia-based travel and hospitality company Crown Resorts went through a similar transformation. CMO Nic Emery started with mapping out the customer journey and understanding what points make the biggest differences in the customer experience—and part of that was helping ensure the right technology was in place to provide great personalization at scale. Emery describes the process as starting with putting the data in one place and overlaying it with a cloud-based customer relationship management system to "feed the critical parts of interactions our front-of-house staff needs today." By doing so, Crown Resorts is uncovering "small windows," such as acknowledging a loyal customer's birthday when visiting any of their properties, that "will make quite a big difference to the experience customers will have."[8]

To better appreciate the customer experience—and its potential deficits—consider these three key tasks:

- *Understand the experience strategy:* Identify each channel and touch point along the customer journey.

- *Make sure they're connected:* The channels and touch points should create a congruent experience for customers.

- *Design with human-centered factors at the forefront:* Consider the entire service experience, including the customer, talent, and third-party service providers.

Bill Beck, CMO of the health insurance company Anthem, explains how Anthem is embedding AI in all of its channels, from digital self-service tools to call centers: "We are using AI to understand why a member is potentially calling us—and how we can provide service for them when they call. For example, if it's a benefits question, we can get ahead of it before they call, so that we can quickly take care of them."[9] This also provides time for its associates to serve members in more proactive ways, such as promoting nutrition plans to individuals who may be at higher risk for diabetes.

Ultimately, AI tools are available to help marketers and customer service leaders create an end-to-end customer experience that seamlessly blends AI and human service—to better serve customers *and* the bottom line.

About the research

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