

# **Creating human connection at enterprise scale.**

How to turn brands into bonds,  
based on our latest research.

June 2020



*Foreword:*

## What has (not) changed in the course of our research.

The questions considered in this report have been relevant for brands for decades but gained a new urgency with the emergence of the novel coronavirus / COVID-19 disease as a global pandemic.

While much of the research that informed this paper was conducted prior to widespread awareness of the pandemic, a more limited study was conducted in April 2020 during the pandemic that validated and reinforced the findings.

We found, in short, that the ways that most consumers *choose and engage with brands*—as well as the ways they hope brands will use their personal data to relate to them—haven't changed.

This knowledge has tremendous value as you consider how your brand should respond, recover and thrive in the coming months. It suggests you focus on a few core tenets as you weigh your investment and marketing decisions:

- **Understand the emotional context** in order to get the tone of engagement right as events unfold. This means connecting as much customer data as possible, in real time; and sensing and understanding how broader trends are impacting individual customers.
- **Create more human experiences**, particularly through customer service. More than ever, great service can help

retain customers and attract new ones—so be cautious about cutting costs or capacity in this area.

- **Tap the rational** to inspire emotional connection. Pivot faster with offers, products and prices driven by changing needs to spark trial through rational connection.
- **Let customers decide** about how, where and when they prefer to be contacted. Some may need you more than ever while others need a break. By listening and responding to the preferences of each individual customer as gleaned from the data they provide, you show respect and responsiveness—which can translate to trust.

# Background & overview

Marketers have long believed that emotional relevance is important in connecting with customers and fostering loyalty. This conviction has inspired a storied history of heartstring-tugging commercials, loveable brand mascots, catchy jingles and category-defining slogans. Yet, in many instances, those warm feelings don't endure as customers move from brand awareness into engagement and beyond. Experiences that feel disconnected, service that feels impersonal and customer data collection practices that feel invasive can break emotional bonds as quickly as they are built. And once those bonds are broken, they can be difficult to mend.

Since 2018, Deloitte Digital has undertaken research to help provide a deeper, statistically grounded understanding of the role that emotions play in loyalty across the entire customer life cycle—and to help companies understand ways to translate those findings into tangible actions and initiatives. This research included multiple surveys of a statistically valid sampling of American consumers across a range of demographic, geographical, brand preference and brand tenure groups; the work also included analysis of hundreds of thousands of publicly available social media posts. We looked at responses to understand not only bigger-picture trends but also the peculiar, often complex and never identical preferences that make people ... people.

Our research showed that in good times and bad, in flourishing and weakening economies, people expect brands to be empathetic, responsive, respectful and reliable. Customers expect companies to work hard to earn their trust, resolve their issues, listen to their feedback and protect their data. If an interaction isn't infused with the right tone, doesn't arrive at the right time or fails to match the context of the customer's life experience and needs, that one interaction can undermine trust and the customer may be more apt to seek other products or services.

Some of this may feel self-evident: If customers don't get what they want, they move on. But as this paper will reveal, "what they want" isn't always clear-cut. And, it often can be markedly different from what they *experience*. Knowing how to sense and respond to not only the emotional but also the rational needs of customers at an individual level is no longer a nice-to-have for brands; it is becoming a vital bulwark against competition and a driver of value in today's increasingly crowded markets.

Granted, many companies today call themselves "customer-centric." But we believe that the most powerful way to address this competitive opportunity to gain value is to evolve the customer-in-the-center mantra forward: To not just think about your customers **but to infuse everything you know about them, every customer input and data point, into the why and how of what your company does. And is.**

We have previously referred to this business discipline as Operationalized Customer Experience, or OpCX. But now more than ever, it's important for businesses to connect with people at a *human* level—not

just as customers but as individuals whose beliefs, values, feelings and ambitions form the foundation of what they want from the organizations with which they engage. This represents a fundamental shift—not just in how companies operate, but in how they view and relate to the world outside their walls. And, while our recent research has focused only on the experiences, needs and preferences of customers, it is clear that the same principles should apply within the organization, to employees as well as to suppliers and partners.

That's why we've come to refer to this new way of working as Operationalized Human Experience, or OpHX.

In the following pages we will explore how the four pillars of OpHX discipline—*enterprisewide strategy, empowered people, robust governance* and *harmonious technology*—can converge to elevate human experiences for your customers and build lasting loyalty and value for your brand. And we will look at practical steps that your brand can take to utilize an undervalued data set to create a moat of protection from competitors in today's crowded markets.

## Building relationships to build your brand.

Many companies have struggled to connect the real preferences, needs and actions of customers in ways that drive meaningful insights and inform smart strategies at a customer-by-customer level. Our aim in this paper is to help companies answer key questions such as:

- **How can brands effectively establish and strengthen emotional bonds** with customers? And, at a more fundamental level: what, truly, *is* an emotional connection to a brand?
- **What are the key turning points in the customer life cycle** when brands have the opportunity to transcend *product satisfaction* and spark *brand love*?
- **How does *time* factor into the deepening of a brand relationship**—and is it possible to help customers "**fall in love faster**"?
- **What do customers want brands to know about them**—and what do they want them to do with that knowledge?
- **What operational initiatives and cultural changes can help** to build deeper emotional connection with individual customers?





## Getting sticky: Turn brand into bond.

The considerations that lead consumers to choose and stay with brands are complex and multilayered. Rational considerations like price and quality, emotional responses such as trust, and shared values can come into play—and often overlap—at various stages in the journey from awareness through engagement to purchase and loyalty. Our research reinforced and shed new light on the ways that rational and emotional considerations intermingle and build off one another—and the ways that they relate to loyalty and lifetime value.

Rational considerations are top of mind for consumers when they choose products and brands—and again at the end of a brand relationship. When asked to rank both emotional and rational factors on a scale of 1-10 based on how connected those factors made consumers feel to brands, consumers ranked product quality (8.3) and price competitiveness (6.7)—both rational factors—as the most important factors for

favorite brands that they had done business with for at least three years. Results were similar for brands that the same customers had done business with for less than a year.

When customers talked about how they would define a *relationship* with a brand, they focused almost entirely on emotional responses—primarily a combination of trust and loyalty. Those emotional responses, however, ultimately traced back to a convergence of rational considerations. For example, when asked what causes them to feel trust toward a brand, respondents most often referred back to product quality and reliability (83%) and fair prices (71%).

In other words: **Rational considerations may connect customers with brands, but emotions are what bond them in a sense of relationship.**

But, no matter how strong, those relationships are always vulnerable—

particularly to human failure. When asked why they would consider purchasing from a competitor of their favorite brand of three years or more, respondents most commonly cited rational reasons such as cheaper price (33%) and higher quality (26%). Only two percent said they would do so in order to seek better customer service. Yet three out of five respondents said they would likely *abandon their favorite brand* after a bad customer service interaction. Two out of three said they are also unlikely to purchase again from a favorite brand if they received no solution after a complaint.

So while customers may test the waters with competitor brands for rational reasons, they're most likely to abandon ship from favorite brands due to bad human experiences. This makes both rational and emotional sense: As humans, we want and expect more from *people* than from *products*.



Enterprisewide strategy:

## Toward a relational brand.

Companies have traditionally been built around the products and services they create. But in an age of fast-rising consumer expectations and increasingly commoditized markets, **it is no longer enough to create; companies are increasingly expected to relate.**

Doing so means, first and foremost, becoming a better listener. Companies have long talked of giving the customer a “seat at the table” in decision-making about products and policies. But too often, “the customer” was treated more as a symbolic reference point than as a legitimate voice to be heard and heeded ... a target rather than a collaborator.

Compounding the issue is the fact that customers generally don't want to have to tell brands what they want. They just want brands to know, in the same way that an old friend just knows what you want for your birthday or your spouse knows what you'd like for lunch.

Building real, emotionally rich bonds of loyalty depends on your brand's ability to not just listen to customers through the data that they provide, but to also anticipate what they want next—and to shape offerings, communications and service to fit those specific needs and preferences. OpHX discipline can get you there.

Adopting OpHX isn't just about shifting technology, messaging or communication channels. It's about strategically redeploying—and, in some cases, reimagining—your people, processes and technologies in ways that:

- Break down business silos and reorganize reporting and incentive structures in ways that enable and encourage cross-functional collaboration and decision-making.
- Reorganize data to develop a single, comprehensive view of each customer's voice and sentiment.

- Focus on the balance between relationships and transactions in ways that improve and deepen both.
- Meet rational needs in ways that earn your brand permission to connect emotionally.
- Translate the customer's voice into personalized policies and customer-by-customer strategies.
- Infuse agility and constant adaptation across the enterprise.
- Put individual human needs at the heart of business.

In the following sections we will explore some of the key approaches that can help achieve those goals—approaches that are rooted in the expectations of customers already today.



### From emotional bonds to business value.

Feelings don't show up on your company's balance sheet. But they're all over the top lines—whether they're being measured or not.

For example, 87% of respondents said they have been loyal to their favorite brand for three or more years, and they lavished these brands with their most powerful emotional language—words like *love* and *adore*. Moreover, 61% have purchased from their favorite brand at least three times in the preceding six months.

Customers put a real value on trust in particular. And importantly, we found

that over time as trust grows, customers' focus on price lessens—making them less likely to abandon your brand for the latest deal. Surveyed consumers put less importance on trust for brands they had done business with for a year or less (5.4) than for brands they had done business with for three or more years (6.2). Conversely, price competitiveness was more important when talking about shorter-term brand relationships (7.1) than longer-term relationships (6.7).

That trust also paves the way for forgiveness. Sixty-three percent of respondents said that they are more likely to forgive a mistake by a long-term

favorite brand than a brand they have only done business with for a year or less.

Consumers are not being quiet about their feelings, either. Four out of five respondents said they are likely to promote a long-time favorite brand—making those customers even more valuable.

More loyalty, greater sales, louder advocacy, willingness to forgive mistakes ... These are assets that money can't buy, but they're among the most valuable for the long-term success your business.



# Making friends: Be real, in good times and bad.

Loyalty is built on trust, and trust takes time and shared experience to build. Brands cannot accelerate time. But they can do much to facilitate great experiences.

Those experiences can come in many forms, at any moment. You can probably think back to an ad that impacted the way you felt about a brand, or a product that seemed tailor-made for your unique preferences. But our research shows that some experiences are more predictably important than others.

We found that no matter the tenure of the relationship, no matter the brand category, no matter the price point of the product or the demographics of the customer, the experiences that most often and most powerfully build (or break) an emotional bond between customer and brand are service interactions with a representative of the brand.

Generally speaking, people prefer that representative to be a real person. We believe that's because—even in our world of always-on digital access and AI-driven chatbots—people trust people to most effectively and efficiently understand, empathize, take ownership and solve their problems. Our analysis of over 300,000 social media posts showed that person-to-person service interactions were the most common factor cited in posts about feeling “valued” by a brand. And according to survey data, customers view quality and speed of service as being second only to rational considerations of quality and price when it comes to building trust for a brand.

**(See sidebar.)**

This builds upon findings from our 2019 research report, “Exploring the value of emotion-driven engagement,” which showed that consumers prefer brand experiences that feel personal and that mirror the qualities of human friendship—qualities like listening to feedback, responding to requests, adapting communications,

and connecting prior experiences with current context in ways that feel intuitive, empathetic, respectful and consistent.

The importance of great service becomes even more striking when we examined how consumers feel about mistakes and the ways that brands can best solve them.

Most consumers have a good deal of patience with brands. Sixty percent said they will forgive three or more mistakes from their favorite brand, so long as those

mistakes are corrected to their satisfaction. Some people are satisfied with a replacement or exchange. Others are happy with a simple apology. Still others expect gift cards or other financial compensation. No single acceptable solution was named by more than a third of respondents—which is yet another reason why consumers most often prefer human interactions for service: Today's self-help and automated response technologies rarely can adapt to the customer's preferences for how an issue should best be resolved.

## What helps to build trust.

Aside from considerations of price and quality, customers base their trust for a brand primarily on the quality of service they receive.

Quality products or services **83%**

Fair prices **71%**

→ **Issues fixed in a timely manner** **55%**

→ **Helpful employees** **48%**

History with the customer **40%**

Business ethics **38%**

Honest messaging **37%**

Environmental impact **20%**

Societal impact **14%**

(Respondents could select all that apply.)



*Empowered people:*

## Balancing efficient service with meaningful engagement.

This points to a fundamental paradox for brands. Even when self-service or chatbot options are just a click away, people say they generally prefer to receive service from a store associate or a phone representative. For the business, that type of human service is typically the most time-intensive—and thus, expensive—option available; it is also the most difficult to scale. Yet most customers prefer human service because, in their experience, it is often the most efficient (or only) way of addressing a problem of any complexity.

What is most expensive for the brand often “costs” the least in the customer’s eyes.

Brands that focus only on the operational cost of providing service are likely to wind up paying in customer loyalty through what we refer to as human experience debt—a deficit of meaningful connection that saps value from the brand. Ironically this debt often sprouts at precisely the moments when brands have the opportunity to grow fast and meaningful equity through emotional connection with the customer.

Solving this challenge doesn’t require a leap back to a bygone model of all-human service; that’s not practical given modern demands of 24-7-365 responsiveness. Instead, it’s about recognizing that humans are—literally and figuratively—at the center of operationalized human experience. **By empowering your people to be more responsive to the needs of customers through new access to data, technologies and ways of working, you can infuse more human-like qualities across all of your customer touch points.**

That starts with learning each customer’s individual needs and preferences,

connecting that knowledge across every touch point and engagement you have with the customer, and then recognizing and responding in real time to the signals that indicate the most appropriate means and solutions for providing service. The predictive powers of artificial intelligence combined with your existing customer data can make this possible today.

It means building automated tools and capabilities that are as smart about the individual customer’s history, preferences and needs as they are about your company’s products and your brand voice.

It means empowering employees with the customer intelligence, tools and solutions

they need to respond to every situation quickly and in ways that solve the customer’s needs.

At a more fundamental level it means rethinking organizational structure, connection points, employee remit and incentives in ways that allow your people to work across business units and channels. This is ultimately about organizing your operations in ways that allow people to work in the cross-channel, connected way that customers interact with and understand your company; and creating and measuring value not just based on what it costs for the business, but also on how it impacts your relationship with customers.



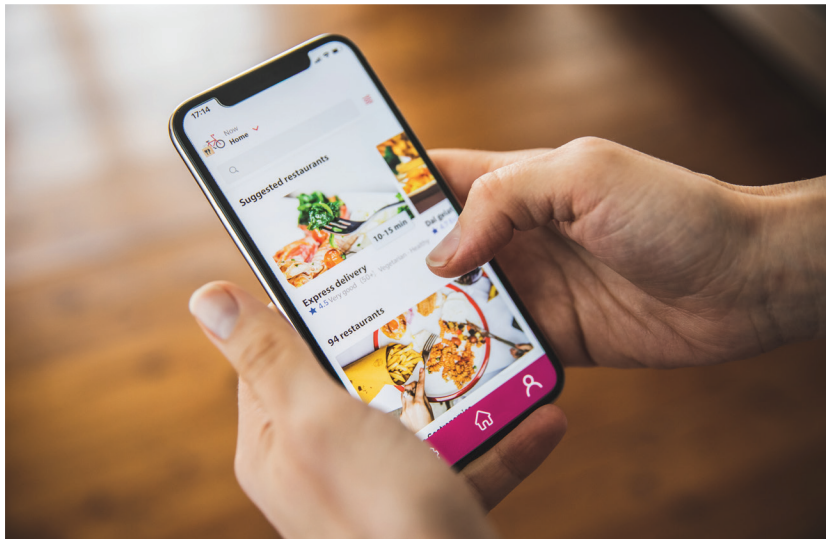
### For frustration, press one ...

In our research, nearly three-quarters of surveyed consumers said that they would accept service assistance from a telephone service agent. This finding comes with a remarkable twist. Our analysis of hundreds of thousands of social media posts found that **people were more likely to complain about telephone service experiences than about any other type of service interaction.** In-person experiences received the most positive sentiment, followed by online and self-help experiences.

The fact that people prefer phone interactions even when those experiences most often leave them unsatisfied is telling. Those moments

have powerful potential to feel singularly human and personal and to help build a sense of genuine relationship between customer and brand. Yet—whether due to maddening touchtone mazes, long hold times set to bad music, or unsatisfying interactions with service agents who lack the information, tools or authority to resolve customer issues—the potential in those interactions is often squandered.

Decades after telephone customer service became common across industries, this remains a significant area of opportunity for brands to improve and differentiate the quality of their service—and, as a result, the depth of their relationships with customers.



# Walking the line: Turn customer data into better experiences.

Outside of a few notable large brands, personalized, human service has traditionally been a competitive advantage of small, local businesses. It's how the corner pharmacist and the drive-through coffee stand have managed to compete and even thrive on the same city block as globally scaled competitors. For large companies—especially those that lack their own bricks-and-mortar operations where customers can engage and build personal relationships with employees—competitive strength has more often come down to rational considerations such as pricing, convenience and selection. But, as we've seen, rational considerations can only go so far to foster loyalty, leaving openings for competitors to steal customers and market share through more rationally appealing or emotionally relevant offerings, service design, messaging or experiences.

The ability to elevate the human experience at scale is grounded in how well your brand can collect, connect and understand customer information in ways that feel personal and intuitive across every touch point, while learning and adapting over time. In principle, that's no different from what the corner pharmacist does. In practice, it means knowing what data customers are willing to share, when and where they're willing to share it, and what they expect you to do (and not do) with it.

Just as it takes time to get to know a new friend, our research indicates that it also takes time for consumers to warm up to brands. But that investment of time comes with significant benefits: When comparing long-time favorite brands to brands they've only done business with for less than a year, our research shows that 63% of consumers are more likely to forgive, 51% are more likely to recommend, and 65% feel more connected to the longer-term brand.

Fortunately for brands, our research found that consumers are generally willing to share information about themselves with the companies they love. In fact, when it comes to key personally identifying information

or past experience and engagement with the brand, *surveyed customers said they are okay with brands knowing more about them than they think the brands already know—by a significant margin.* Our survey showed an average difference of 22% between what consumers think brands know and what they are ok with brands knowing when it comes to personal information. **(See sidebar.)**

This might seem to fly in the face of intuition given the push for greater privacy protections through legislation such as the California Consumer Privacy Act (CCPA) and the EU's General Data Protection Regulation (GDPR). And indeed, consumers' willingness to share personal data comes with an important condition.

Across all of our customer research since 2018, across all groups, the message is consistent and clear: **people want brands to use their data to provide better service and personalization.**

That means not only recognizing signals from the customer but also responding to

them in appropriate ways, at an individual level. The balance can be delicate. For example, when providing *positive* feedback, 52% of consumers just want brands to use that to gain a better understanding of them. But when giving *negative* feedback, 60% want brands to take action and solve their issue. And brands that model their actions based on what some customers want are still likely to upset plenty of others. For example, approximately a third of customers are okay with their favorite brand knowing their social media activity—but, when answering a separate question, one out of three people said they *would not remain a customer* if the brand used that information.

A humanized, personalized model for governance of data and process can help you do right by your whole customer base. It can also be a hugely valuable business advantage, providing you with the permission to collect more data than your competitors and use it in ways that deepen a sense of relationship and loyalty with each customer.

## Know me. And love me.

Surveyed consumers are generally okay with a favorite brand knowing more than they believe the brand already knows.

Personal information	Believe the brand knows this information	OK with the brand knowing
Email address	71%	90%
Full name	61%	84%
Home address	54%	74%
Reason for purchase	47%	77%
Birthday	46%	71%
Purchase preferences (size, style, color, etc.)	35%	84%
Age	33%	65%
Payment information	44%	51%
Social media handles	17%	40%

**They want the brand to use that personal information to ...**

**49% send personalized discounts or offers** in line with the customer's preferences

**35% proactively reach out and solve issues** when a negative experience is registered





Robust governance:  
**Audience of one, brand to many.**

Adopting OpHX discipline has significant implications for corporate governance. One-size-fits-all policies, risk models, practices and processes are ill-suited to a paradigm in which the brand listens to each customer and adapts accordingly.

A vital first step is recognizing what customer data is ultimately useful to the brand and what is not. There is risk—not just in terms of customer relationships but also brand, financial, and cyber risk. The biggest risk is in collecting too much data, especially in the face of new data privacy and customer access regulations such as the European Union’s General Data Protection Regulation and the California Consumer Privacy Act.

As you shift toward becoming a more personalized and human brand, policies and

processes should be rethought in terms of how you *maintain appropriate boundaries and consistency across millions of unique relationships*. The goal: to accelerate the collection and connection of customer

data while setting the stage for the intuitive experiences that inspire greater loyalty, greater sharing, greater advocacy and greater value.



**Right time, right place.**

For some customers, *where* you ask for their personal information is often as important as *what* you ask. Surveyed consumers said they are twice as willing to provide personal information online—primarily through the company’s website—versus in person; they are much less willing to share information over the phone. Understanding and adapting to these preferences can have a significant impact on how soon and how much data you’re able to collect from customers. Moreover, it points to the importance of connecting customer identity and data across channels so that the data you collect in one location can inform the experiences you provide across other touch points.







# Finding your voice: Connect more data to deepen individual relationships.

A consistent brand voice and reliable experiences are central to building trust with customers. But, as the previous sections of this paper discuss, individual customers often have unique and contradictory preferences for how they want to engage with you, what they're willing to share and what they want in return.

This points to a challenging reality of customer engagement: When it comes to emotional needs and personal preferences, no two people are the same. It's just human nature. Moreover, customers aren't always willing or able to declare those needs and preferences, so interpretation and synthesis fall to brands to solve.

Historically, brands have dealt with the complexity of customers by clustering them into broad segments based purely on demographic and transactional data. But that approach is insufficient to serve customers who now expect brands to recognize, glean insights from, and act in response to contextual data across a wide range and history of experiences and touch points.

Our research found that even among customers who consider themselves most loyal to a brand there are those who would no longer purchase from the brand if it acts in ways that many other customers relish. For example, 18% of surveyed consumers said they don't want their favorite brand to do *anything* with the information the brand has about them. That's one out of every five customers saying, in essence, that their strong preference for personalization from their favorite brand is ... none. In today's business environment, can your brand risk losing 18% of its *most loyal* customers?

The list of disparate preferences revealed in our research goes on:

- 18- to 34-year-olds are 1.3 times more likely to accept self-help solutions from a brand compared to people 55 and older.
- One out of four consumers said they would be unlikely to purchase from their favorite brand again after receiving daily communication from the brand; but most consumers said they are neutral or fine with daily contacts.

- Most surveyed consumers said they preferred to accept help from a store associate (74%), while 30% preferred help via social media.

It's unlikely that all of these variable preferences can be solved by creating more customer segments built on demographic and transactional data. Instead, our research supports the conclusion that brands should reorient themselves to focus on nurturing unique relationships of shared value with each customer, by leaning into the experience and contextual data that customers provide. Doing so means **learning to balance consistency and reliability with adaptability and responsiveness—at an individual customer level, at global scale.**

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## Harmonious technology: Harmonize to humanize.

Intelligent, integrated, interconnected technology can make this possible. By connecting everything you know about the customer, applying machine learning and artificial intelligence to glean predictive insights, and infusing that intelligence into every conversation, email and offer, your brand can orchestrate tailored experiences that honor the unique humanity of each customer—while still being true to what makes your brand valuable. And by

connecting the individual's experiences across time, brands can foster a sense of consistency and reliability.

This is the ultimate potential of OpHX discipline: a relational, agile, emotionally intelligent enterprise that can sense, react to and serve its customers in much the same ways that friends treat friends. Showing them that they're not just valuable ... they're *valued*.









# Emotional discipline: Infusing human experience into the enterprise.

Because no two people are alike, no two human relationships will ever be alike. This truism can also apply to brand relationships with customers. But for most large companies, achieving dynamic, empathetic and mutually valuable relationships with customers has traditionally been more like a distant aim than a realistic destination.

Today, that opportunity has arrived, thanks largely to technology. Visionary brands are leaning into the convergence of mass datafication, faster and more scalable processors, machine learning, and artificial intelligence in ways that help them identify, understand and interact with customers at an individual level rather than simply as segments. At the same time, they are accessing an ever-wider array of opportunities and channels to efficiently and effectively connect with customers across the journey from awareness through purchase to ongoing engagement and advocacy.

Every day, those companies are raising the bar of what's possible through personalization—and consumers are taking notice.

Of course, businesses should first and foremost solve problems for customers through products and services. That will never change. But in our ever-more connected world, it is increasingly difficult to carve out and defend marketplace based purely on what you sell. That's why 86% of marketing leaders expect to compete completely or mostly on the basis of customer experience by 2021.<sup>1</sup>

**Between competitive pressures on the one hand and rising consumer expectations on the other, building stronger emotional bonds with customers is no longer just a nice-to-have for businesses.**

As our research demonstrates, those bonds are what inspire customers to stay loyal, to advocate on behalf of favorite

brands and to forgive them when problems occur. Fostering those bonds most often starts by consistently addressing rational considerations such as the cost and quality of your offerings. But beyond what you create, it's how you relate to customers that can set your brand apart.

We recommend that companies focus on four key initiatives—the pillars of OpHX discipline:

- Reimagine your *enterprisewide strategy* to better humanize core operating principles and to tie more closely to experience management operating processes.
- Reorganize, incentivize and *empower your people* to build experiences, offerings and systems of value for the customer while creating a culture that is difficult for competitors to match.
- Recognize that customer data is likely underutilized, undervalued and

increasingly a proprietary differentiator for your organization—and that *robust governance* can help you use that data correctly in ways that elevate the experiences of customers.

- Respect that this new way of working is difficult and cannot happen without investing in *harmonious technology* that helps meet customers where they are and predict where they want to be—and that can scale to meet the growing demands of an increasingly diverse and evolving customer base.

Fully embracing this new discipline can have long-lasting implications across your operations and culture—the why, how and what of your brand core. Those that succeed will find they have built a moat of protection that can help thwart competitors, while becoming more empathetic, more responsive ... more like a good friend to the customers who ultimately matter most.



## GET IN TOUCH

### Tim Greulich

Operational Customer Experience Practice Leader  
Deloitte Consulting LLP  
tgreulich@deloitte.com

### Angel Vaccaro

Hux Practice Leader  
Deloitte Consulting LLP  
avaccaro@deloitte.com

### Jennifer Buchanan

Customer Experience Insights Leader  
Deloitte Consulting LLP  
jenbuchanan@deloitte.com

### Sarah Logman

Data Science Leader  
Deloitte Consulting LLP  
slogman@deloitte.com

## ABOUT OUR RESEARCH

Since 2018 Deloitte Digital has conducted a series of research studies of adult consumers in the United States that support the findings included in this report.

*2018:* Study examined how emotional responses, rational considerations and shared values impact consumers' connection with brands. Included a general survey of 800 consumers; an online panel session of 112 participants; collection and analysis of 91 million publicly available

social media posts across 30 brands and 11 industries; and meta-analysis of Deloitte Voice of Customer data from 2,090 completed surveys from two service-driven industries.

*2019:* Study focused on the factors that connect consumers to their favorite brands. Included a survey of 800 consumers; and collection and analysis of 600,000 publicly available social media posts.

*2020:* Study focused on the difference in how consumers connect with longer-term (3+ years) favorite brands and shorter-term (<1 year) brands. Included a survey of 800 consumers in January 2020. A follow-up survey of 800 consumers was conducted in April 2020 to identify any changes in responses due to the emergence of the COVID-19 pandemic.

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### SOURCE:

1. Augie Ray and Jane-Anne Mennella, Gartner, 2019 Customer Experience Management Study: Marketing Take More Control as CX Expectations and Budgets Rise," October 11, 2019, p. 14, <https://emtemp.gcom.cloud/ngw/globalassets/en/marketing/documents/2019-cx-management-study-research.pdf>.