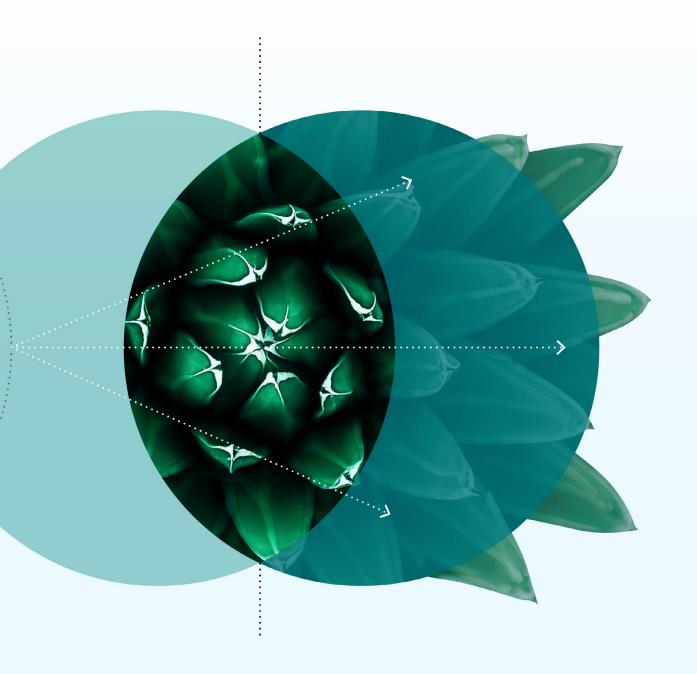**Deloitte.**
Insights

2022 Global Marketing Trends

Thriving through customer centricity

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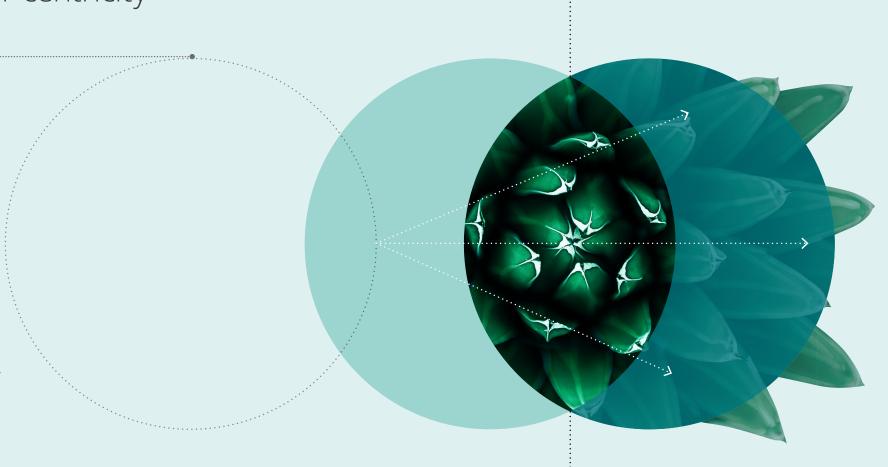
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Introduction

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?

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

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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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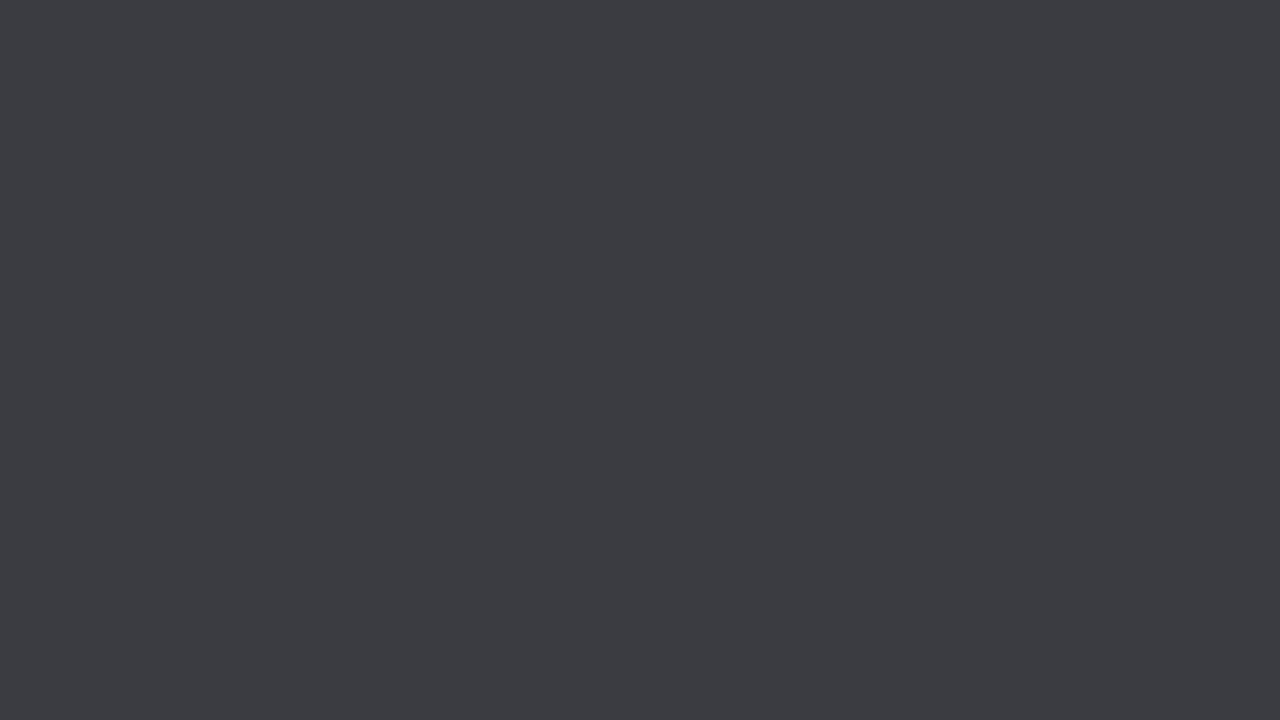
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Designing a human-first data experience

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%).
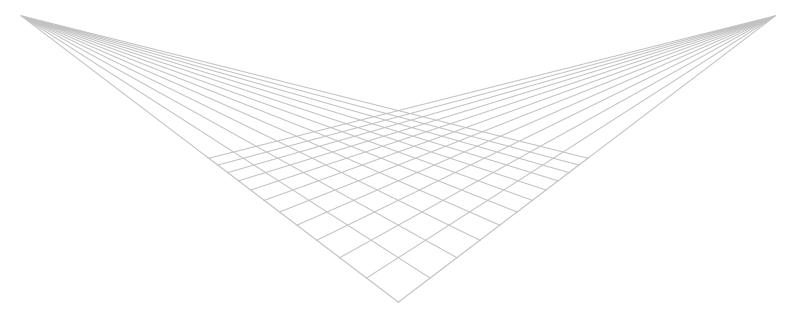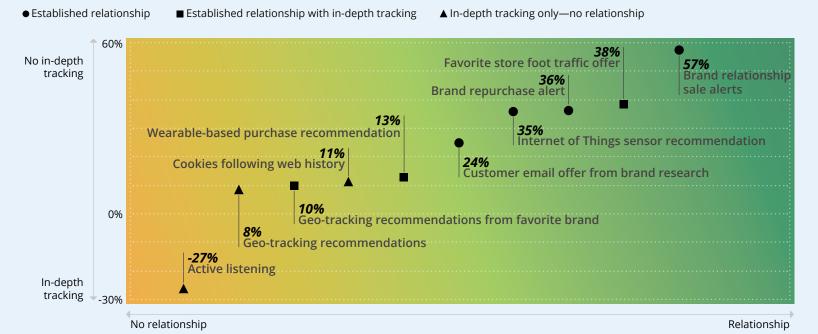
FIGURE 1

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.
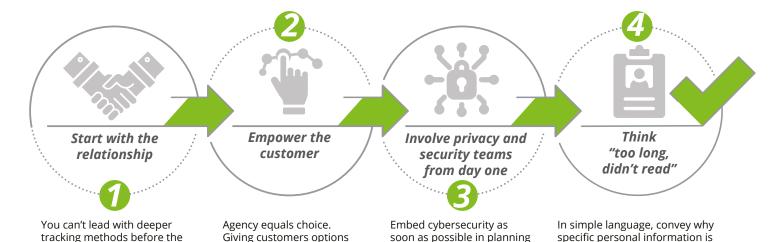
FIGURE 2

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.

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. Deloitte Digital, *A new measure of trust for consumer industries*, 2020.
2. Ibid.
3. Sourced from executive interviews conducted between May and August of 2021 as part of the 2022 *Global Marketing Trends* research.
4. Deloitte Digital, *A new measure of trust for consumer industries*.
5. Executive interviews conducted as part of the 2022 *Global Marketing Trends* research.

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RECOGNITION AND APPRECIATION

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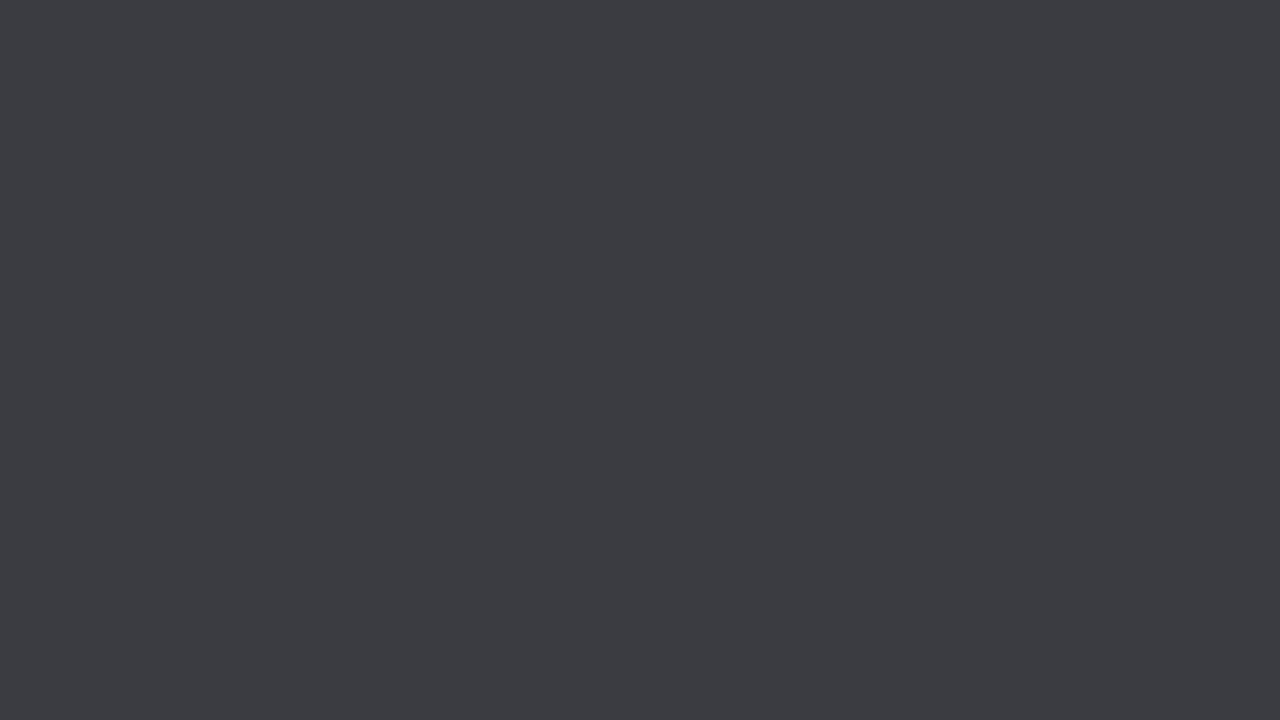
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