



PREDICTIONS 2025

B2C Marketing & Customer Experience

Hard-Won Insights Drive Growth

The promise of generative AI to transform marketing and customer experience (CX) fueled experimentation in 2024. These programs delivered mixed results — and the realization that transformation is a long game. In 2025, savvy companies will build on hard-won lessons learned and focus on streamlining their data infrastructure to improve efficiency and customer insights. There will be urgency to their work: Brands that can revive flagging customer loyalty and reverse all-time-low CX scores stand much to gain.

This guide will help B2C marketing, digital, and CX leaders anticipate the trends that will define 2025. You'll learn how the use of AI will evolve, how martech and loyalty tech stacks will merge, and how agencies will combine creative and scaled execution. In addition, you'll gain insight into the foundational improvements that will drive customer growth through loyalty programs and why you should stay the course on one particular media channel investment.

Underlying our predictions this year is a piece of advice: Use the insights gained from trial and error to methodically build a path to growth. Avoid the pitfalls of short-term thinking and focus on meeting customer expectations. The moves you make this year will lay the groundwork for future success.

PREDICTION

Most enterprises fixated on AI ROI will scale back prematurely.

Enterprises are achieving improved customer experience, employee productivity, and even new revenue streams with AI use. But an AI reset is underway. Obvious use cases that enterprises experimented with last year are now table stakes and embedded in business software. Leaders are realizing that ROI from investments will take longer than they anticipated and are shifting toward pragmatically delivering ROI over time. In Forrester's Q2 AI Pulse Survey, 2024, 49% of US generative AI decision-makers said their organization expects ROI on AI investments within one to three years and 44% said within three to five years. Impatience with AI ROI could prompt enterprises to prematurely scale back investments, which would be a long-term disadvantage. Instead, AI leaders must establish a solid strategy aligned to their business model and aspirations. Pick differentiating use cases leveraging company-specific data and expertise, and create a roadmap that balances short-term and longer-term business ROI to create a flywheel for reinvesting early successes into future AI projects.

PREDICTION

Investment to unify data for the loyalty and marketing tech stacks will triple.

According to Forrester's Q3 B2C Marketing CMO Pulse Survey, 2024, 78% of US B2C marketing executives concede that their marketing and loyalty technologies are siloed. But those days are numbered. Factors including economic pressure to increase efficiency and consumers' demand for continuity across customer experiences will converge in 2025 and push loyalty and martech together. Conventional wisdom says that eliminating redundant channel execution across marketing and loyalty is low-hanging fruit, but the most impactful and pragmatic opportunity lies with synchronizing data. The data gap between marketing and loyalty practices is wide today: Eight in 10 US B2C marketing executives utilize separate data assets for loyalty and martech. Do you want to increase visibility of your customer interactions, improve the precision of your customer insights, enable expanded personalization options, and eliminate the cost of overlapping data infrastructure? Of course you do. Prioritize a consolidated data strategy in 2025 that delivers consistent and expanded data access for both loyalty tech and martech.

PREDICTION

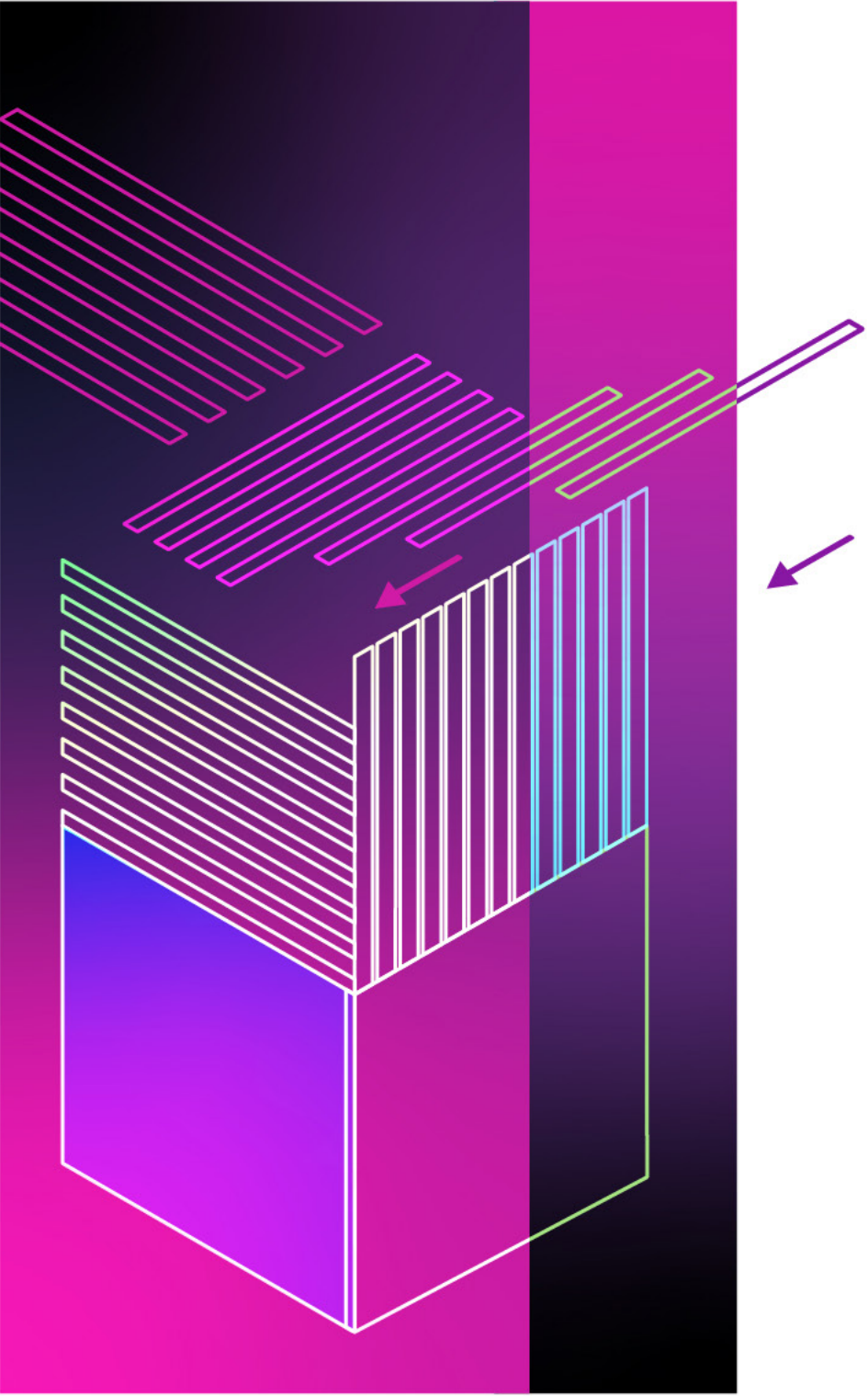
Brand loyalty will decline 25%, but usage of loyalty programs will increase.

Price sensitivity and high prices loom on consumers' horizons. In the US, food costs are up 22% since the pandemic, and in China, Apple and Starbucks are resorting to uncharacteristic discounts. SHEIN and Temu have demonstrated the power of fiercely undercutting competitors. Price sensitivity breeds brand switching — Forrester finds that a top-five reason why US, UK, and Australian online adults try a new brand is that it is “cheaper than buying from other brands.” While brand loyalty falters, loyalty programs are on the rise. Brands use these programs to help customers realize value in excess of what they might get from indiscriminate price shopping. Loyalty members lock in value through “instant discounts” and “loyalty currency” (such as points and miles), and more than two-thirds of US online adults say that these are important features of loyalty programs. In 2025, expect consumers to be less loyal to brands in general but more committed to brands that assure them value without the hassle of the haggle.

PREDICTION

**GenAI will displace 100,000
frontline agents from the
top global outsourcers.**

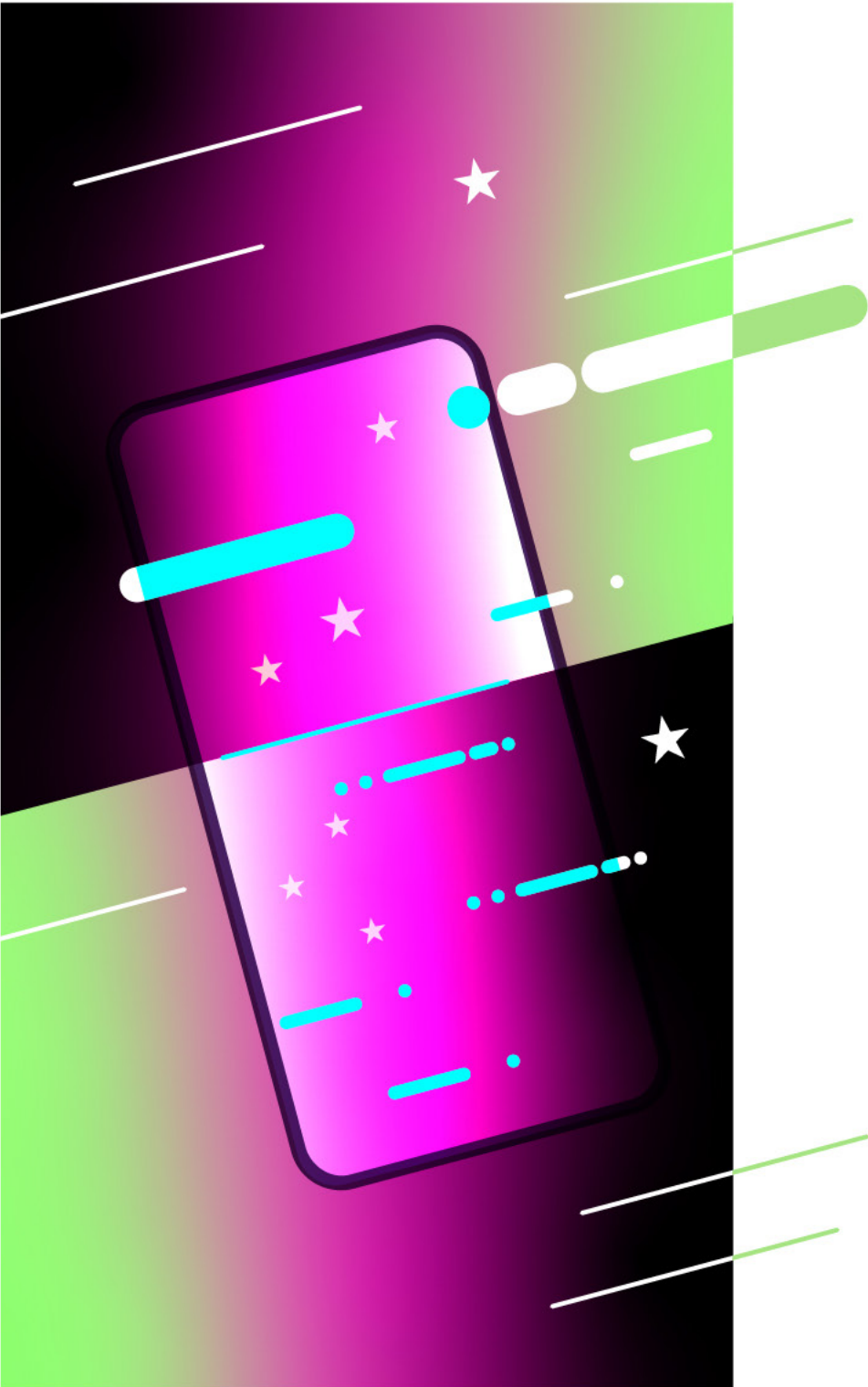
The contact center outsourcing market is an unseen behemoth: Its two largest providers employ nearly a million people between them. An average of 62% of contact centers in consumer-facing industries are outsourced. Half of these outsourced centers employ cheaper offshore or nearshore labor, where generative AI is poised to automate low-complexity issues and lessen the demand for human agents. Many outsourcers will simply reduce headcount to match dwindling demand, especially in the lowest-cost markets, but savvy outsourcers know that integrating genAI into contact centers will happen gradually in large enterprises. CX leaders should focus on service experience improvements by directing their provider selection to outsourcers that adopt performance-based models that reallocate human workers to high-value tasks while increasing automation.



PREDICTION

Creative agencies will reunite creative craft with scaled execution.

The pressure for profitability has forced the split of creative ideation from creative production — dismantling end-to-end creative development services. Independent creative specialists like GUT, Mischief, nice&frank, and Zulu Alpha Kilo provide ideation services, while holding companies maintain production behemoths like WPP’s Hogarth, Dentsu’s Tag, and Publicis Groupe’s Prodigious. In 2025, new creative partnerships will emerge that reunite the big idea with scaled activation: Dentsu will combine Tag with Dentsu Creative; Omnicom will combine Omnicom Production with its newly created [Omnicom Advertising Group](#); and [Plus Company](#), a group of 26 creative independents, will pursue production scale. CMOs conducting creative agency reviews in 2025 should look for providers with built-in ideation/execution partnerships or assemble and manage a roster of independent specialists, similar to what [General Motors](#) and [General Mills](#) have done.



PREDICTION

TikTok will not get banned or divest in the US in 2025.

Despite intense pressure from the US government to divest TikTok from Chinese-owned ByteDance, the immensely popular platform is sticking around. TikTok’s data collection practices aren’t materially different from US-based social media platforms. And with both US presidential candidates having actively used TikTok as part of their campaign strategy, neither will dupe young and vocal voters. Politics and lawfulness aside, TikTok is investing millions in lobbying and legal fees, which will help push the appeals process beyond 2025. But should our prediction be wrong, Meta and YouTube stand to gain. Forrester’s July 2024 Consumer Pulse Survey found that if TikTok gets banned in the US, TikTok users would turn to Reels and Shorts instead — exactly what happened when India banned TikTok in 2020. Continue investing in this high-performing media channel, and build a multidimensional creator strategy to support it.

Activate Our Predictions Within Your Organization

Forrester analysts predict changes for 2025 that will present both challenges and opportunities for your organization. Take the next steps to dig deeper into the details of these predictions as well as strategies for driving positive growth. We invite you to join us for:

2025 B2C Marketing & CX Predictions Webinar

On January 16, 2025, we'll explore the trends that will define the coming year in a live webinar. You'll learn how the use of AI will evolve and steps to take to gain efficiencies and improve customer experiences. If you're not available on that date, be sure to tune in for the on-demand version.

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