

# U.S. Digital Consumer Trends Index 2022

Consumer Attitudes and Trends in Personalization, Privacy, Messaging, Advertising, and Brand Loyalty in the U.S.

In conjunction with ●Econsultancy





# Executive Summary

For generations the path to purchase for U.S. consumers has been relatively linear. Digital marketers would fling resources on various advertising formats, and as long as the sales funnel was laden with email addresses, eyeballs were reported to have seen creative, and the bottom-line was hit, few questioned the status-quo.

Then came a raft of data scandals, CCPA legislation and a global pandemic that irrevocably changed the commerce landscape. U.S. consumer behaviors, coupled with digital transformations that traditionally changed over several years, began to shift in a matter of days. As a direct consequence, the path to purchase we see today is anything but linear.

U.S. consumers interact with a brand on multiple channels, oftentimes unpredictably, with over half (55%) using a mobile phone while in a store to research a purchase, and a sizable 45% claiming to have browsed for products in a physical store only to purchase later online. It's clear that if you are not listening to these multiple touchpoints across various channels, have them connected, and are able to activate in real-time, your customers will be purchasing elsewhere.

Marketers that have relied on third-party cookies and the retargeting ads they fuel are in a quandary. Not only is Google et al. cementing plans to comprehensively curtail third-party cookie tracking within the next year, but 56% of U.S. consumers think retargeting ads are creepy, and a mere 15% will miss cookies. These sweeping changes to the martech and adtech industries reinforce the need for marketers to shift to a first- and zero-party data strategy to power their advertising and marketing initiatives.

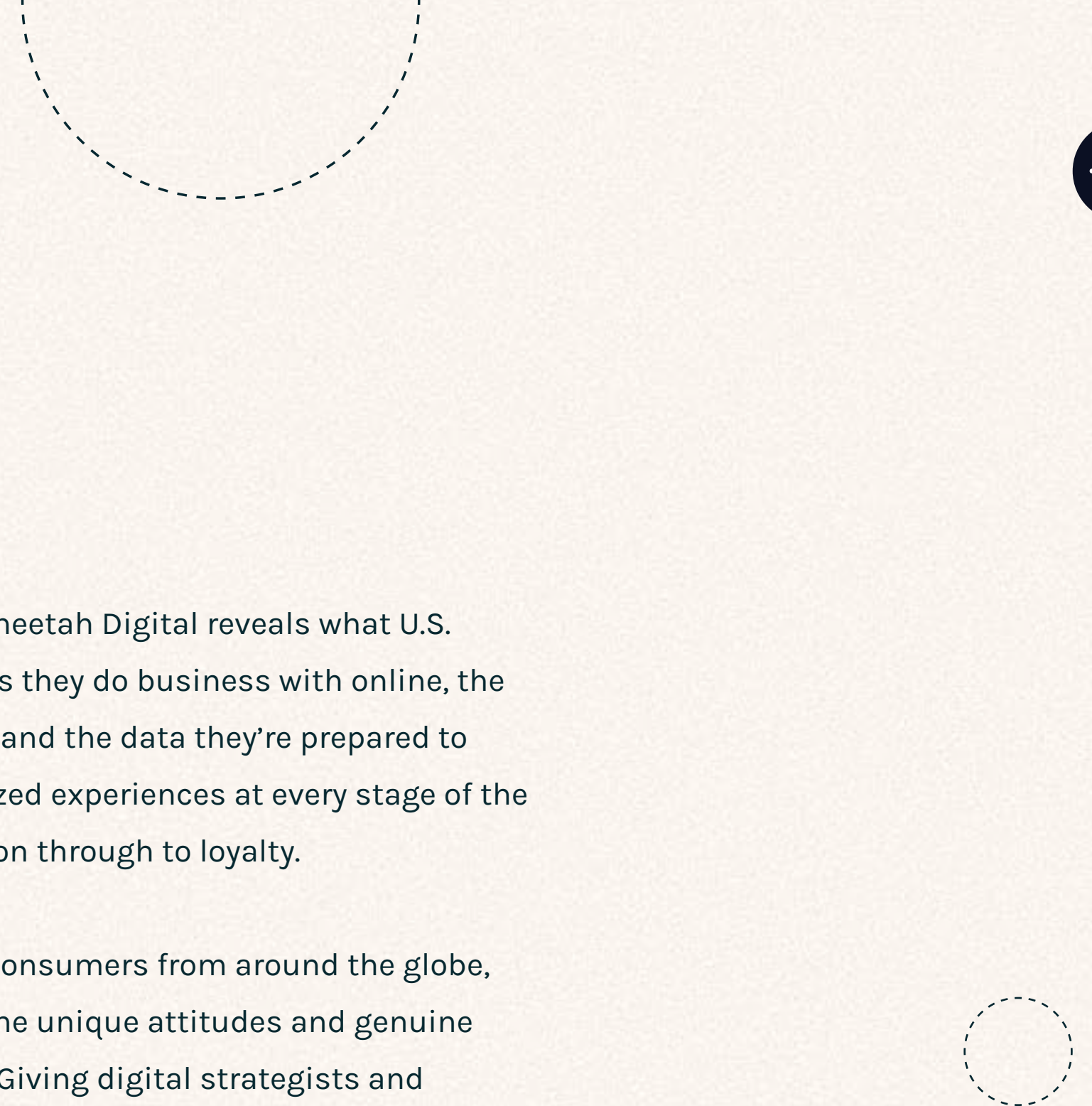
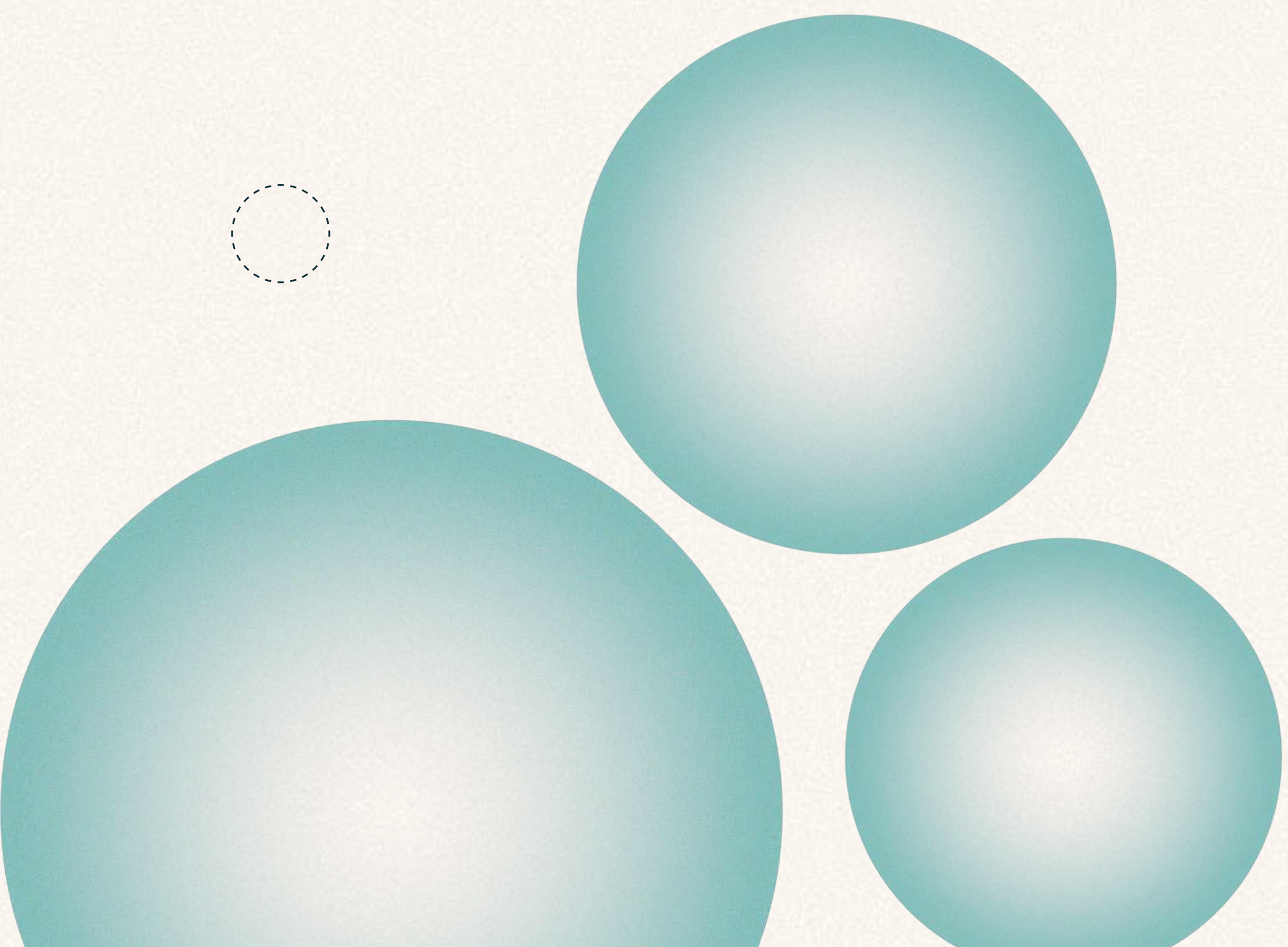
The good news is that U.S. consumers are quite happy to trade personal and preference data if you offer the right value exchange. Whether it be a discount or loyalty points, or something more holistic like unlocking content, exclusive access or being part of a brand's community, in every instance U.S. consumers find these things valuable, and will share data for these services.

While this is a time of great flux for marketers, it's comforting that U.S. consumers continue to love loyalty programs, and more than ever before intend to take part in them this year. Three quarters of U.S. consumers not only have a favorite brand, but are prepared to pay more to purchase from it.

Points-for-prizes is merely one of the many different tactics one can use to help engender loyalty. Of course U.S. consumers love a discount for their loyalty (62%), however there have been huge increases in those consumers who love engaging interactive experiences like contests and sweepstakes, personalized product recommendations based on their self-reported preferences, and those that would like brand recognition in return for their loyalty.

The data you are about to read in this report has the ability to significantly impact your revenue goals in both the short and long term, but it may require a willingness to adopt a new marketing mentality. Relationship marketing requires listening to the right consumer signals intently and activating them in real-time in any channel a consumer prefers. This is an extraordinary opportunity to assess your organization's ability to execute on that level and deliver against consumers' growing demand for more personalization, more privacy and a deeper relationship with the brands they know and trust.





# Research Parameters

New research commissioned by Cheetah Digital reveals what U.S. consumers expect from the brands they do business with online, the channels they want to connect on and the data they're prepared to share in return for more personalized experiences at every stage of the customer lifecycle; from acquisition through to loyalty.

This data will be contrasted with consumers from around the globe, as well as our 2021 study to spot the unique attitudes and genuine trends in U.S. consumer behavior. Giving digital strategists and decision-makers the analysis on how these issues fit together to build more meaningful and lasting relationships between brand and buyer. The format for this version of our report focuses on U.S. data, but be sure to visit our [2022 content hub](#) for our global report version, along with an age-group data report (Scheduled for summer 2022).



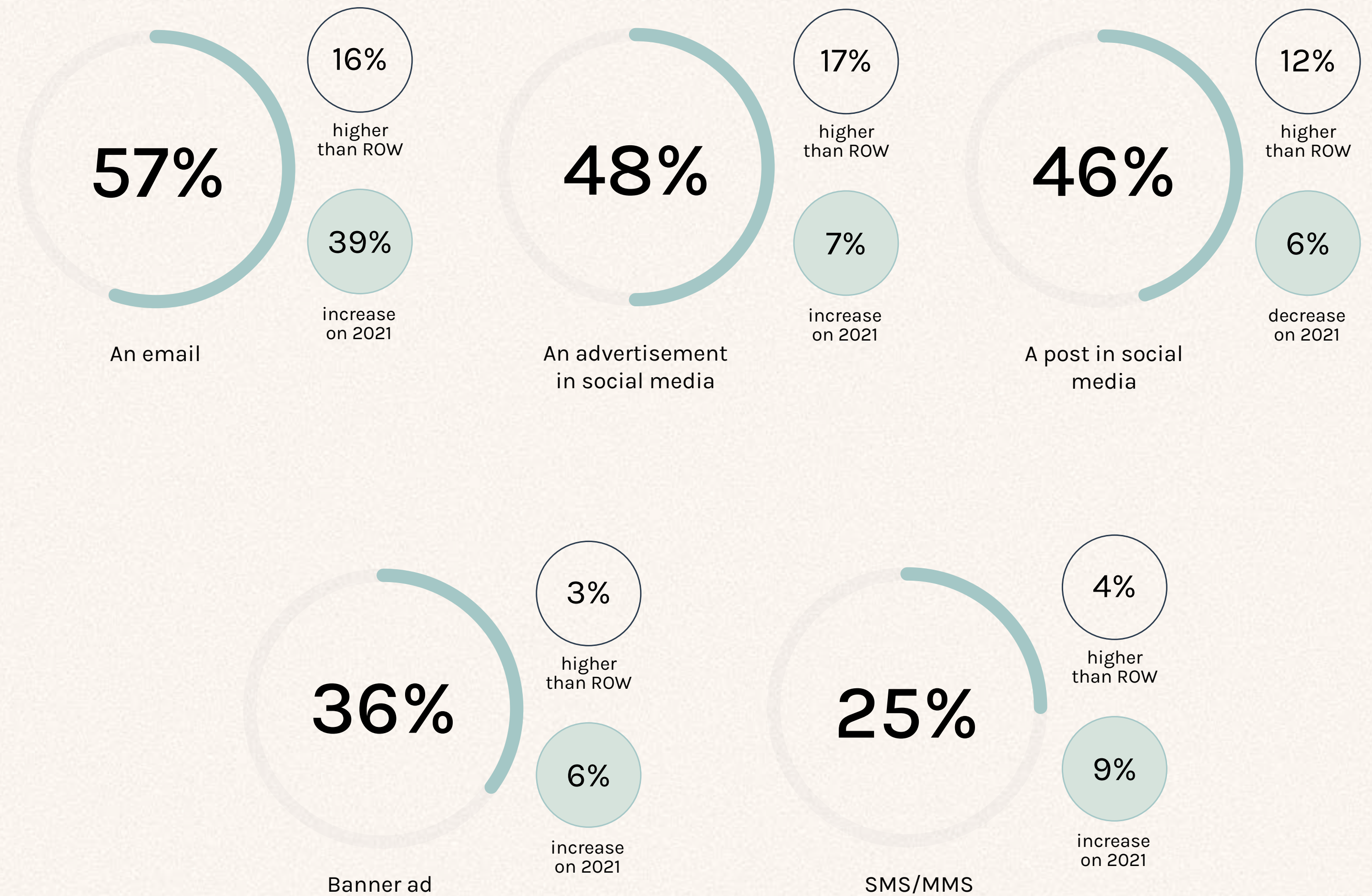
# Email is the #1 Driver of Sales for U.S. Consumers

Email is comfortably the preferred channel of U.S. consumers for receiving offers, content, incentives and rewards from brands. More than half (57%) have made a purchase from an email they received in the last 12 months, a huge 39% uplift on last year, and 16% higher than surveyed consumers from the rest-of-the-world.

There are numerous touchpoints in which one should be connecting with customers, and U.S. consumers are more likely to engage with social ads (17% higher), social posts (12% higher), banner ads (3% higher), and SMS (4% higher), than their peers around the globe.



# Have you ever made a purchase from any of the following in the last 12 months?



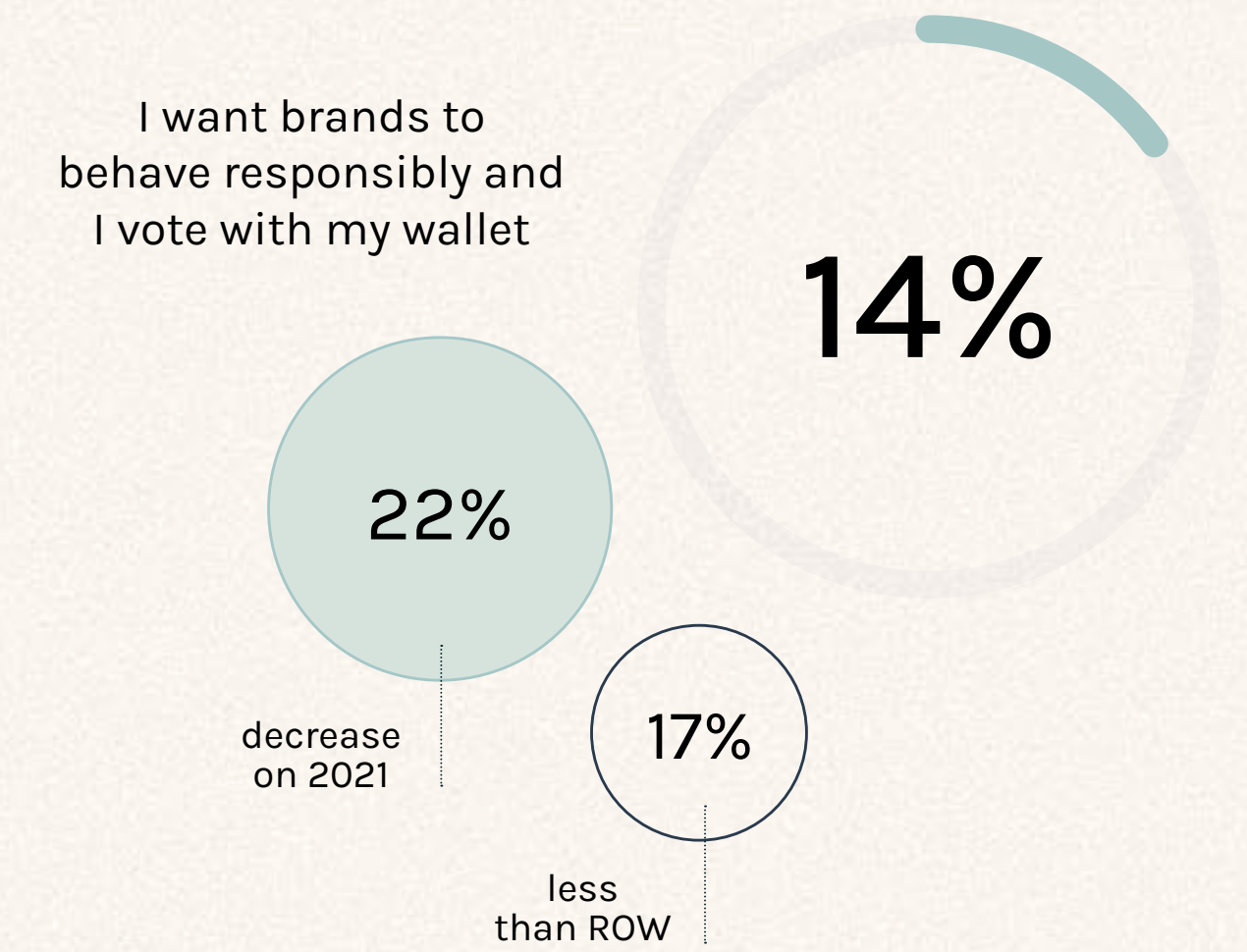
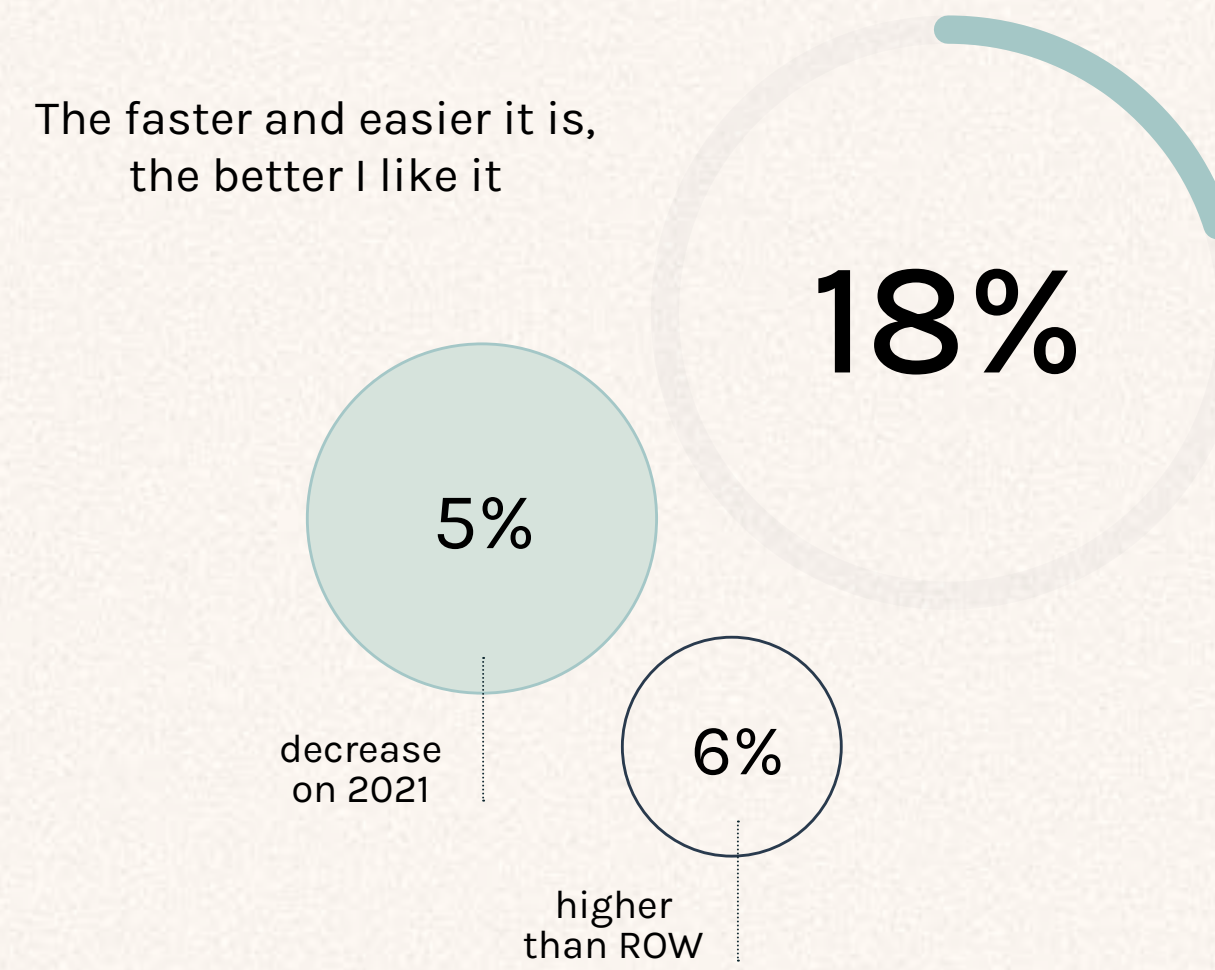
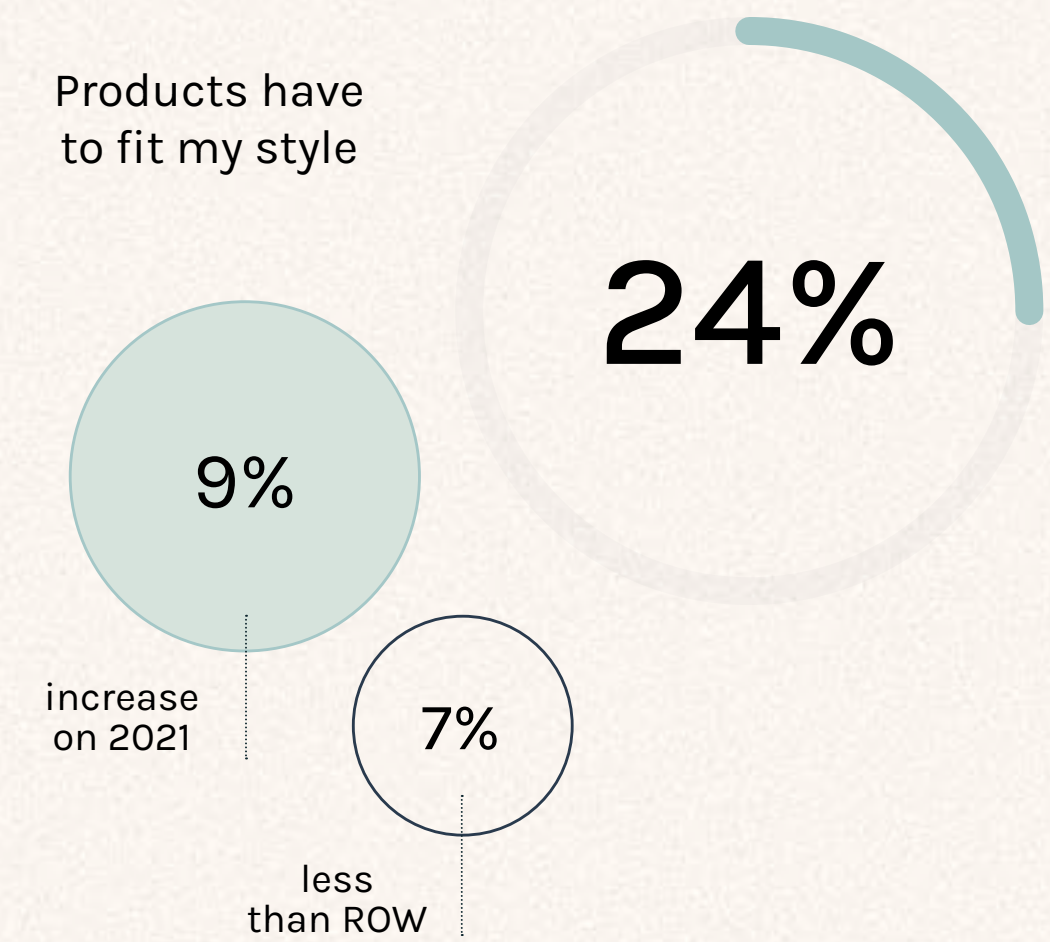
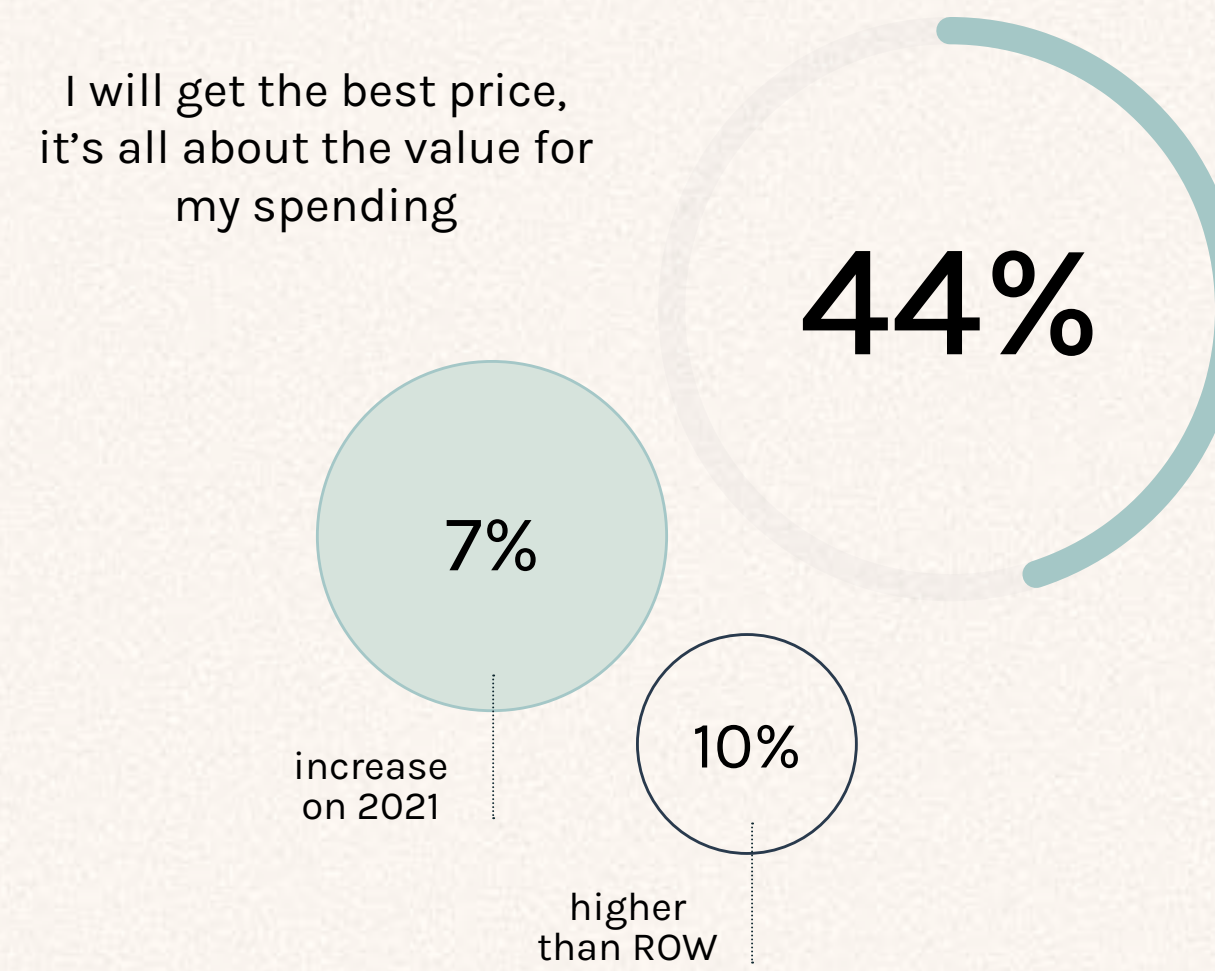


# Purchase Persuasion Factors

U.S. consumers are influenced by a multitude of factors when making purchases. 44% of consumers still hunt for the best price when it comes to buying, a 7% increase on 2021, and 10% higher than consumers around the globe. Others value convenience (18%), fitting their style (24%), and expecting brands to behave responsibly (14%). Price is only one part of the equation that compels a consumer to purchase.



# If you had to pick one phrase to describe you as a shopper, which would it be?



# The Value of Mobile in the Digital Age

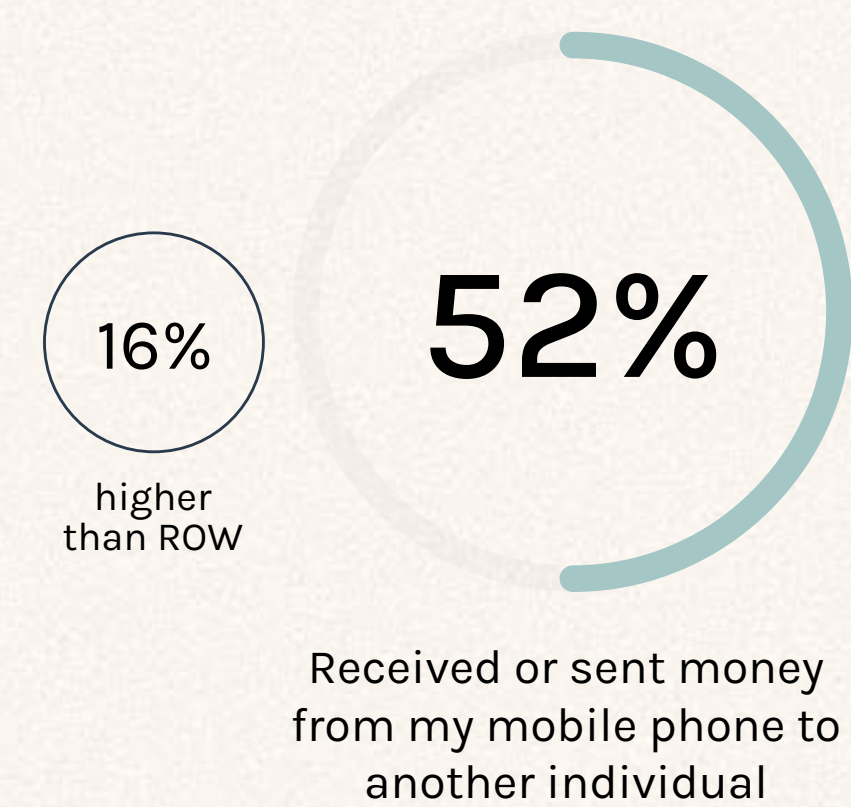
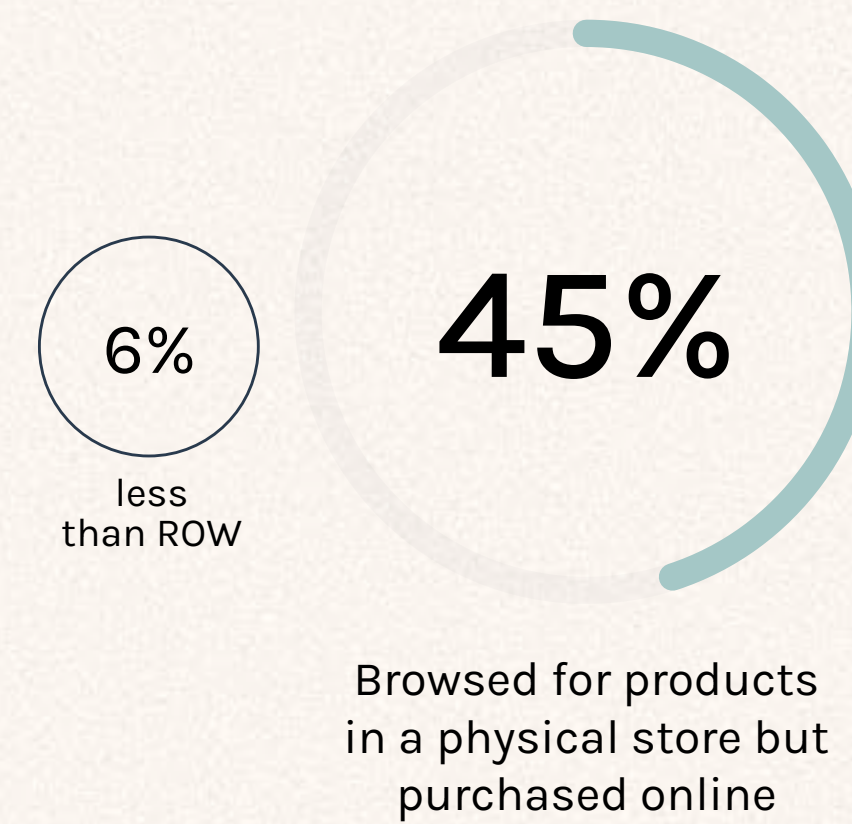
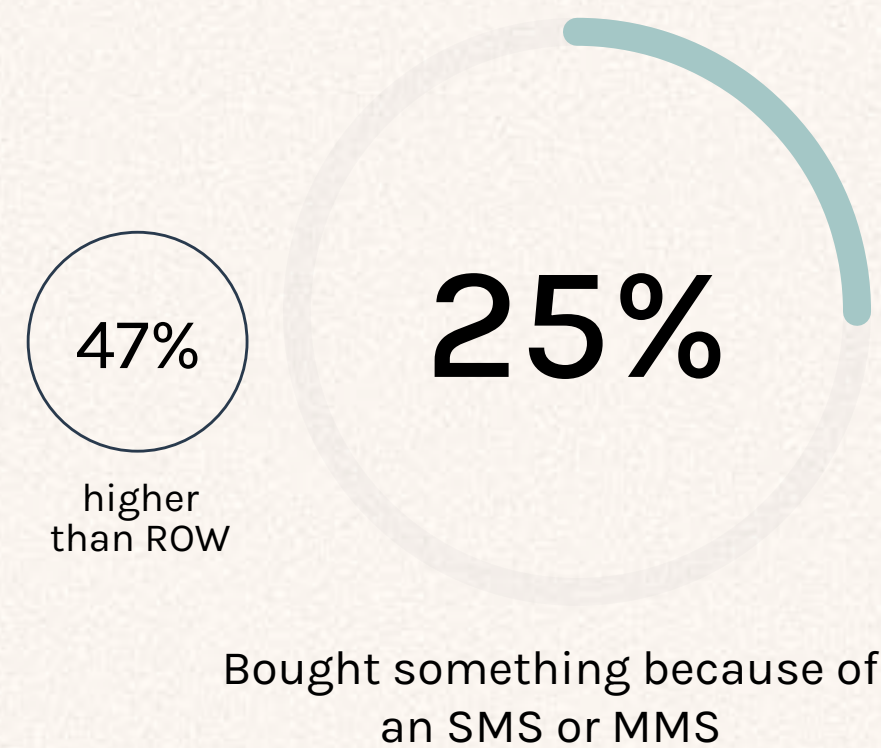
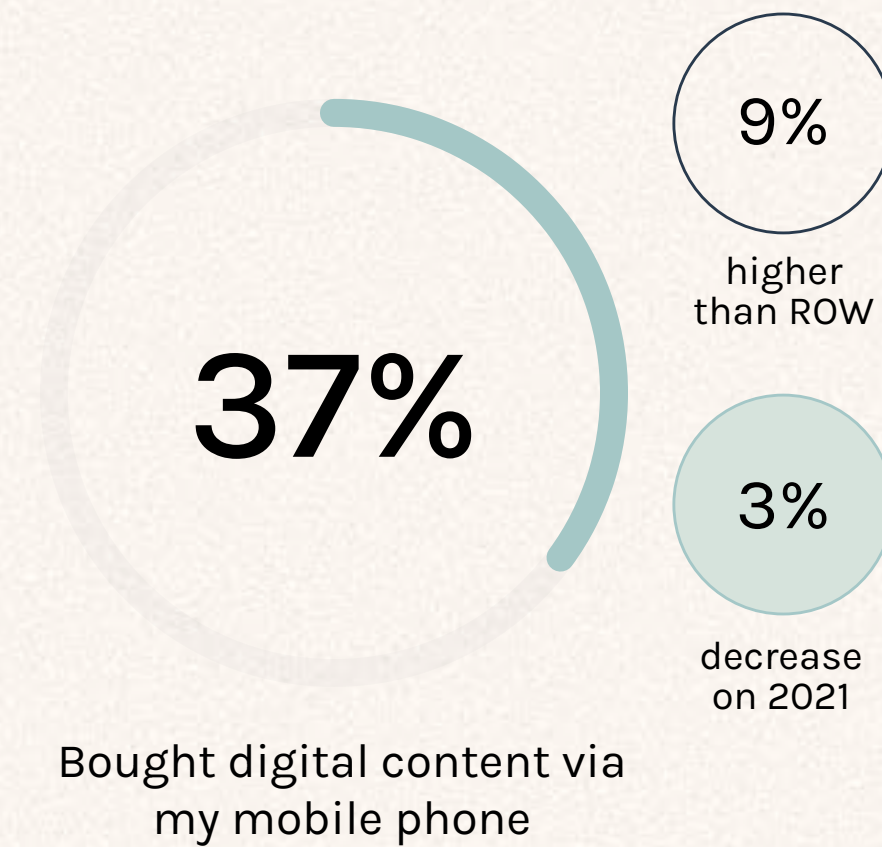
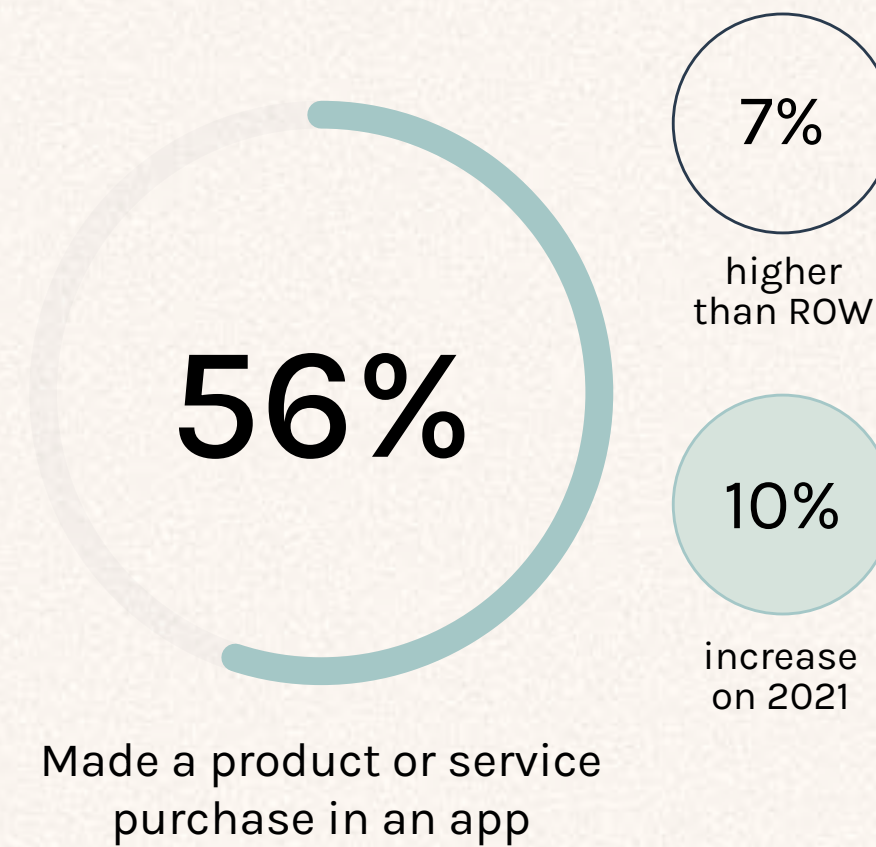
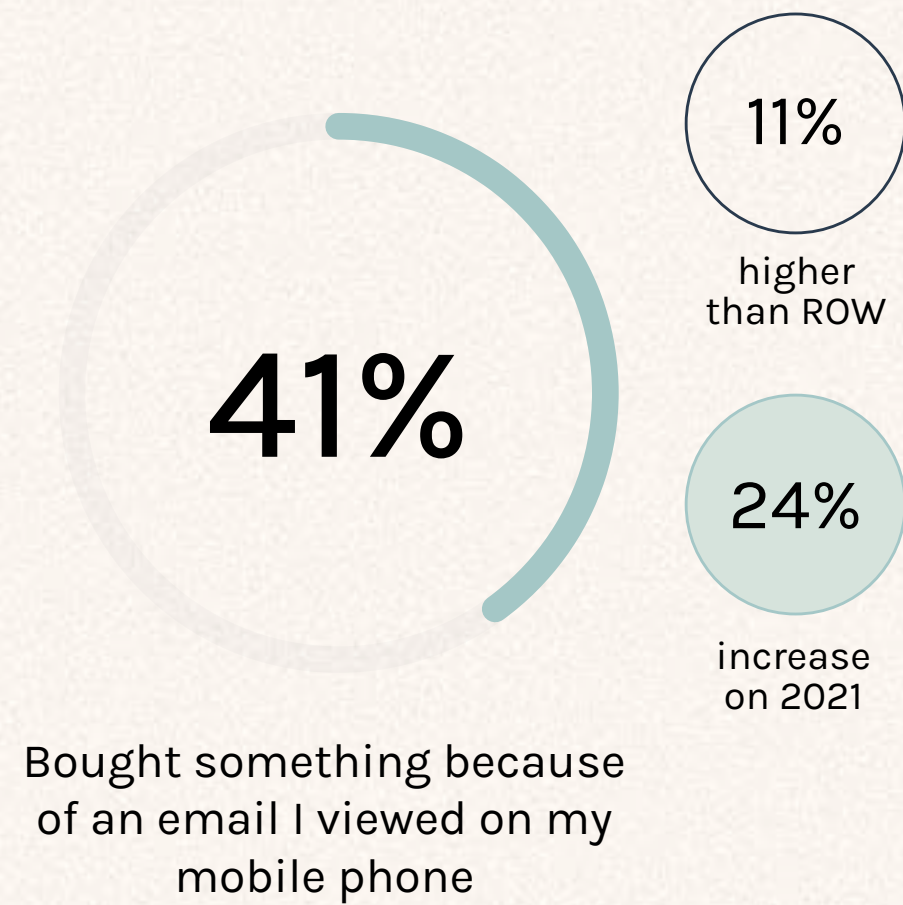
When engaging with a brand, U.S. consumers interact with several digital touchpoints that can almost always be accessed on mobile, with SMS, browser, email, apps, social and wallet readily available on most devices.

More than half of U.S. consumers (55%) declared they use a mobile phone while in a store to help them decide to make a purchase (8% higher than consumers from the rest-of-the-world). And a quarter have purchased directly from an SMS - a staggering 47% higher than elsewhere. It's clear that if you are not listening to these multiple touchpoints across various channels, or if you can't activate that data and provide a relevant and real-time reaction on mobile, your customers will be purchasing from someone else.





# Which of the following, if any, have you done in the last year?





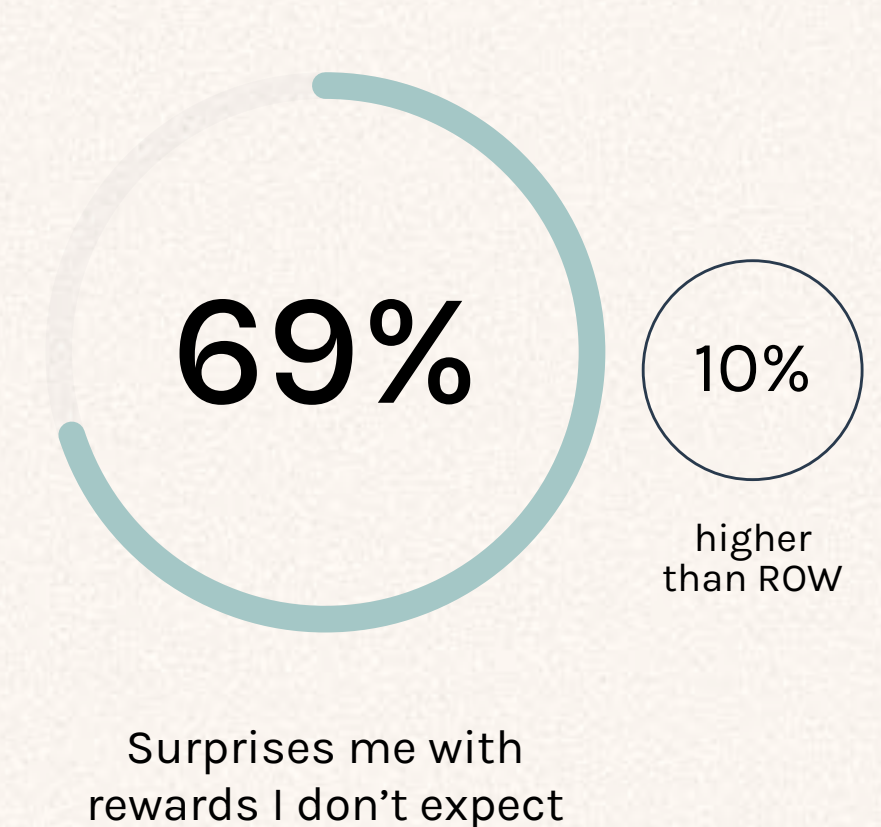
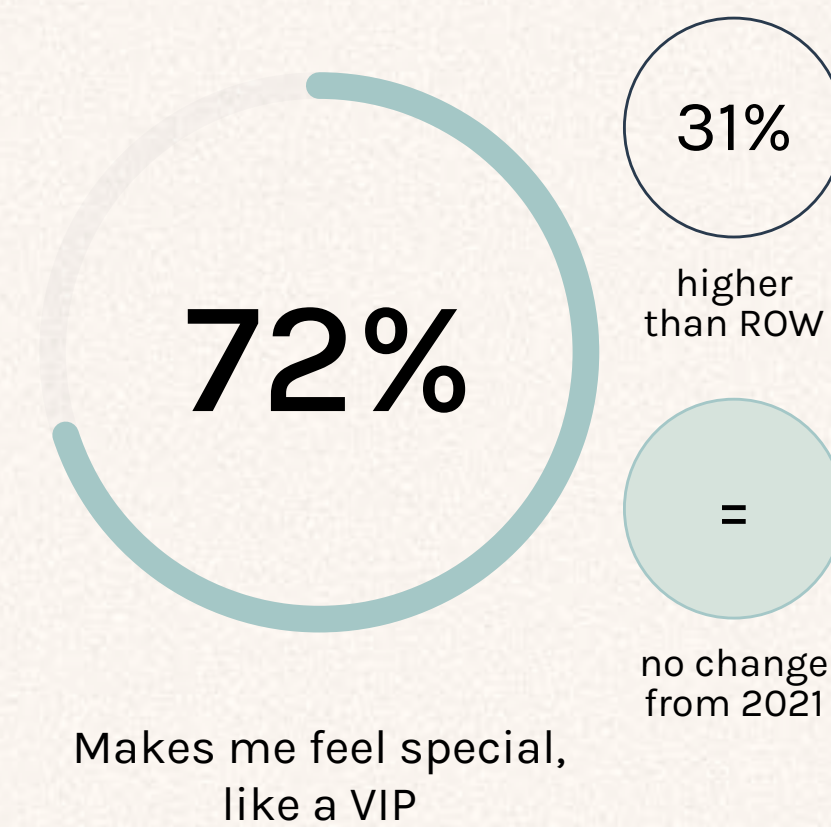
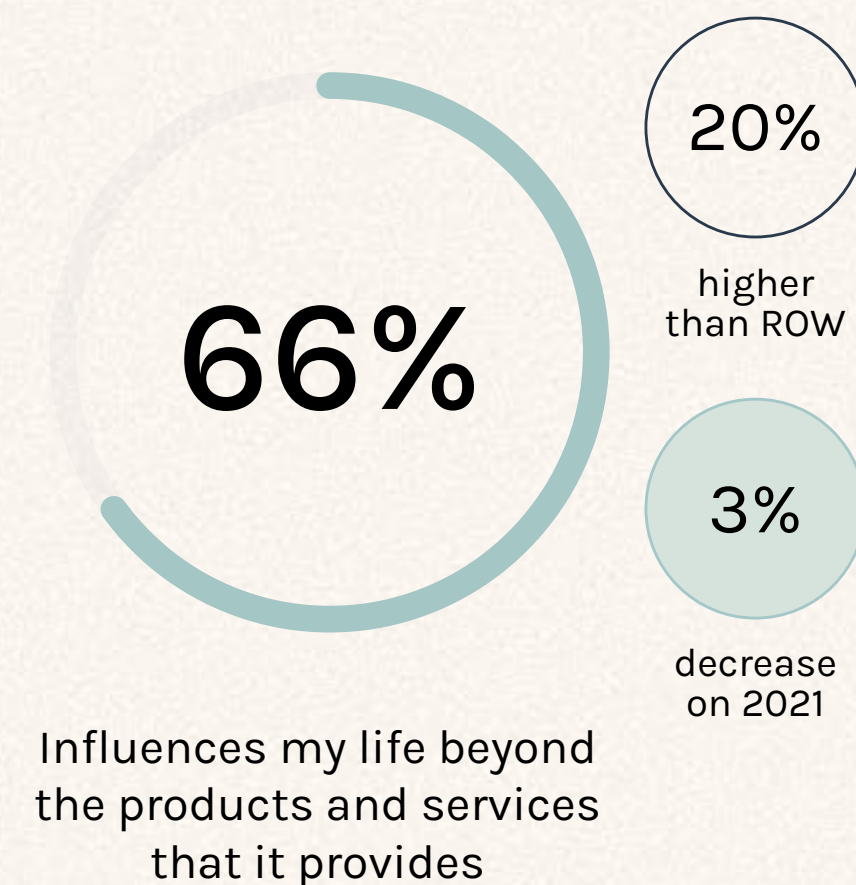
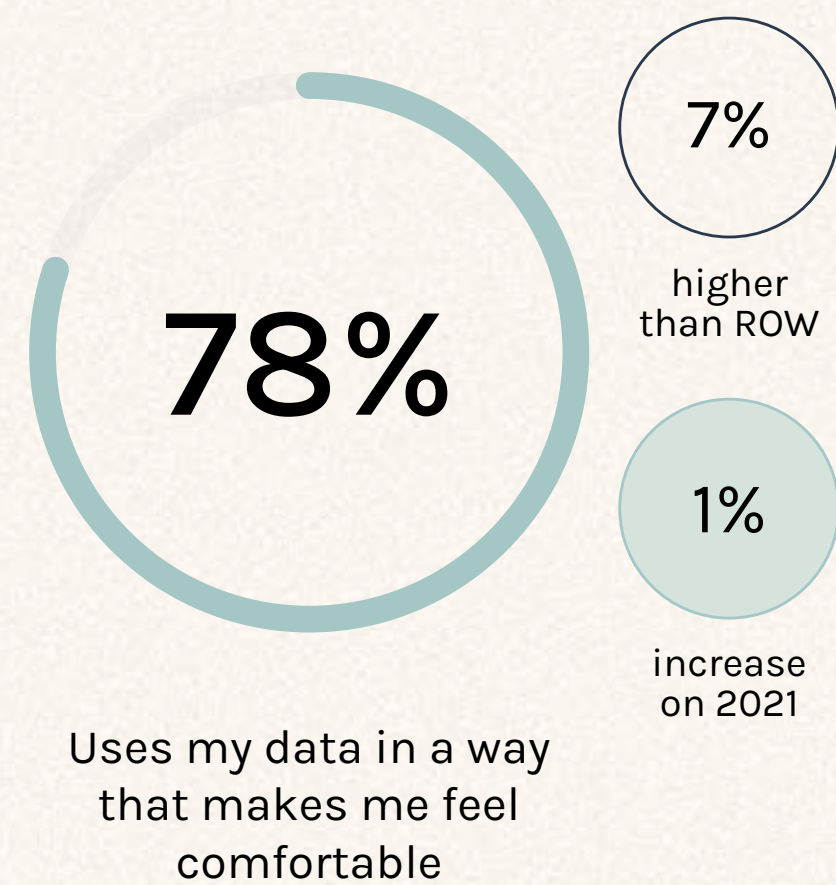
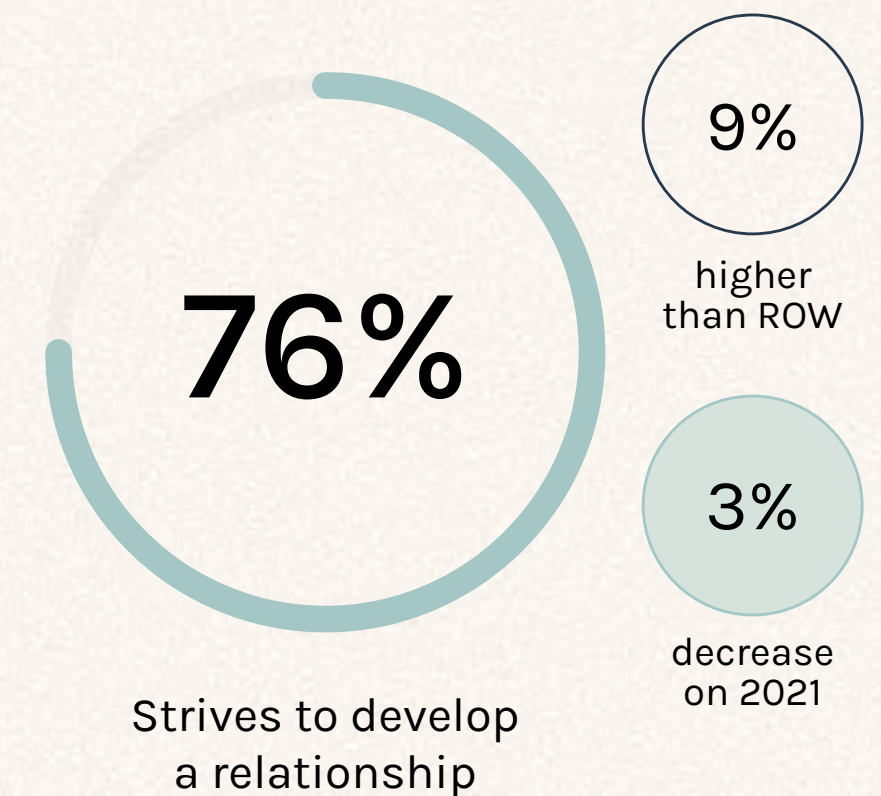
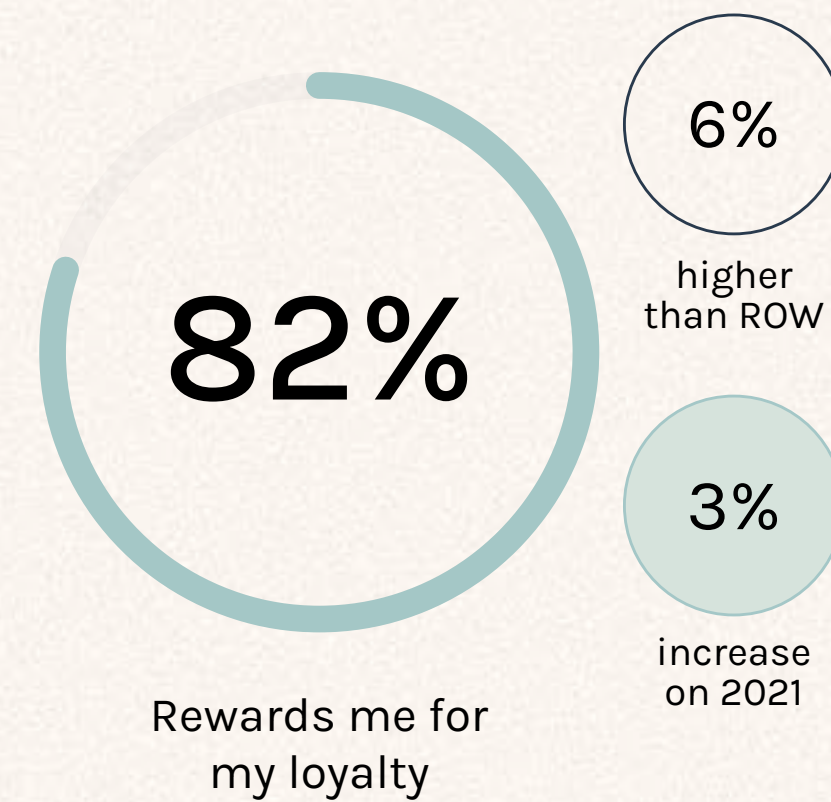
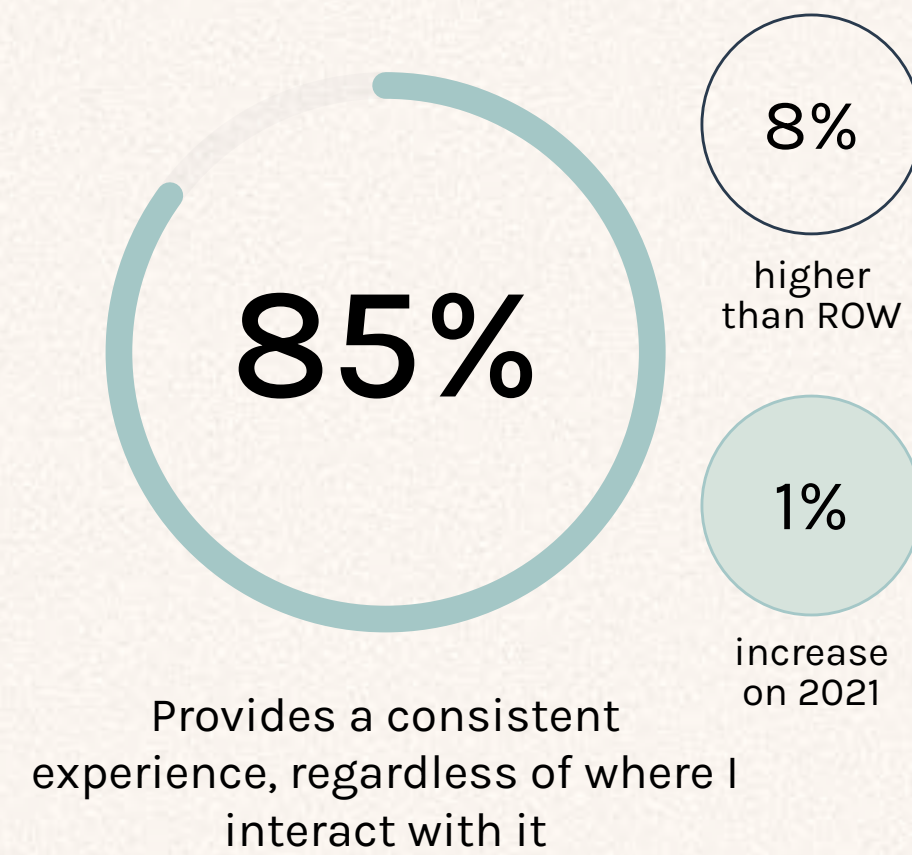
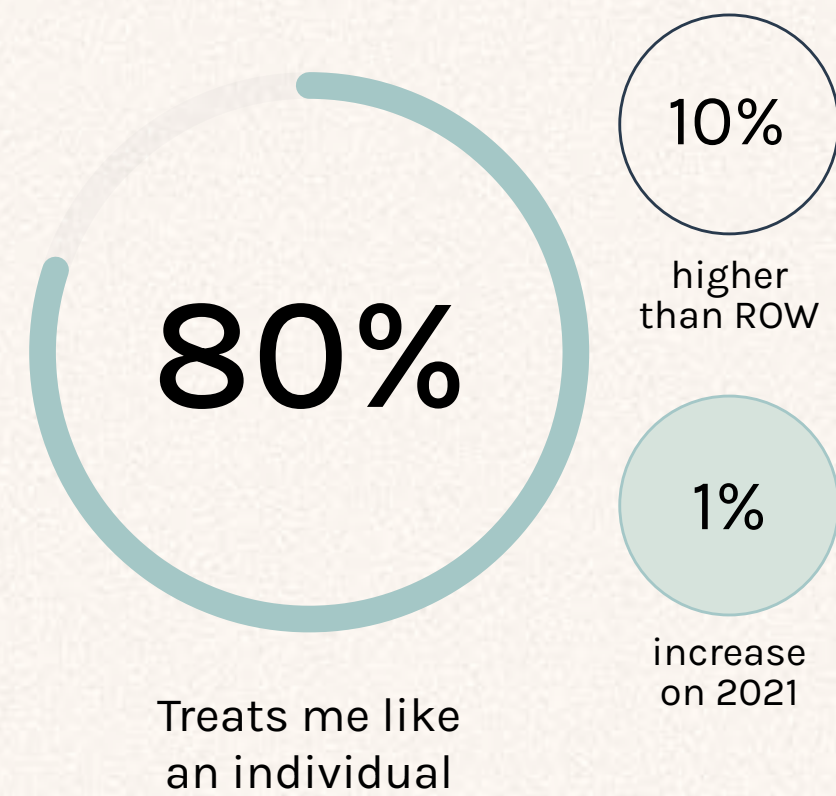
# Favored Brands Treat U.S. Consumers as Individuals, Not Segments

The overwhelming majority of U.S. consumers, when thinking about how their favorite brand communicates with them, want the relationship to go beyond the purely transactional. Above all else, a staggering 85% like consistent shopping experiences irrespective of the channel (10% higher than global consumers). 82% of U.S. consumers have a favorite brand as it rewards them for their loyalty (6% higher than the rest-of-the world and a 3% uplift on 2021), and over 3/4 of consumers like brands to treat them as an individual.

Consumers are craving more individualization from brands and rewarding those that have made that commitment.



# Thinking about your favorite brand that has communicated with you a lot over the last six months, please select whether you agree with the following statements.





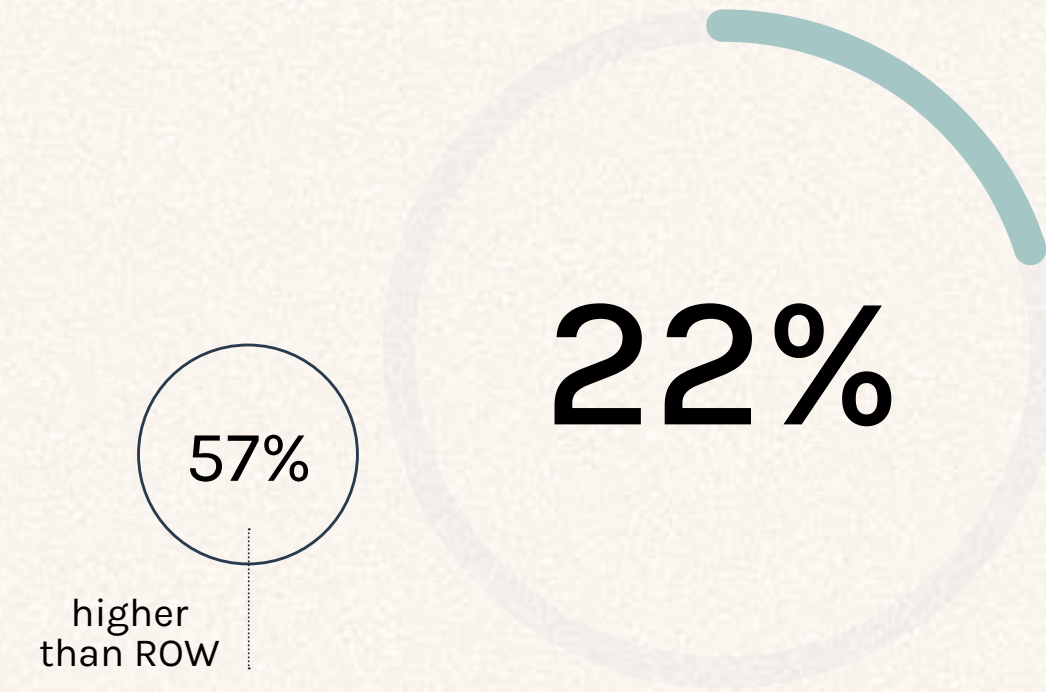
# How Favored Brands Communicate With Their Customers Across All Channels

Your communication frequency should be based on your typical customer's purchase cycle and profile. Almost half of U.S. consumers (44%) describe the relationship with their favorite brand as they communicate as and when necessary – a sweet spot you learn through progressively getting to know your customer.

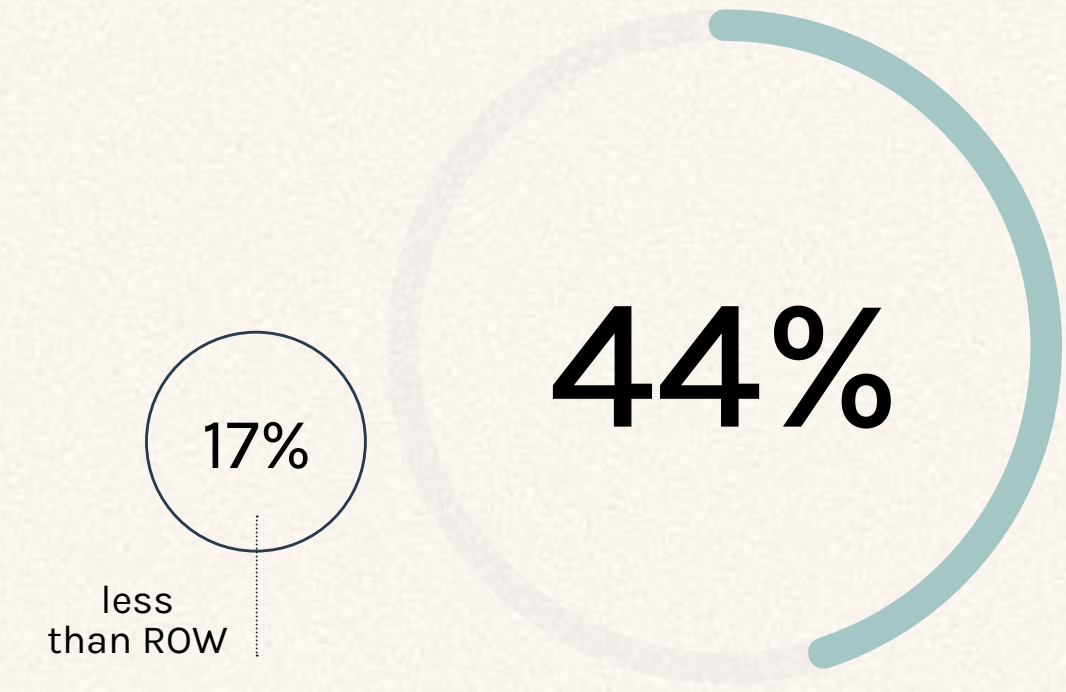
Over a quarter of U.S. consumers (27%) describe the relationship with their favorite brand as one that understands them - a 17% uplift on consumers from around the globe. Intriguingly, 22% of U.S. consumers receive messaging from their favorite brand that makes them feel like a VIP - a huge 57% higher than the rest-of the world.



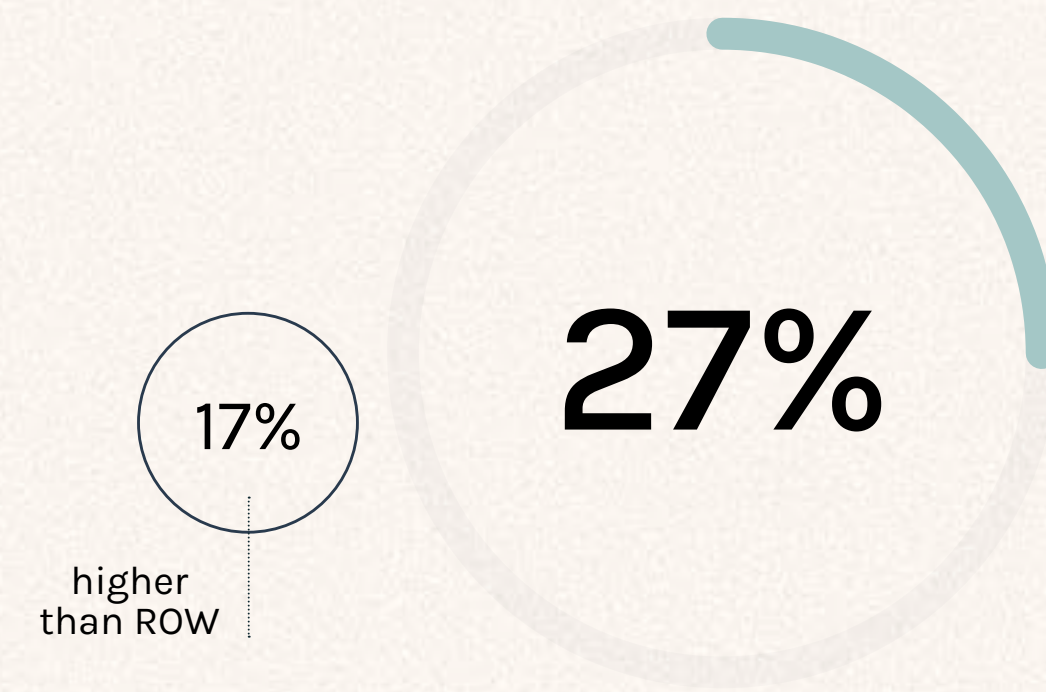
# Thinking of how your favorite brands communicate with you across channels such as email, sms, websites, apps or in-store, which best describes the relationship?



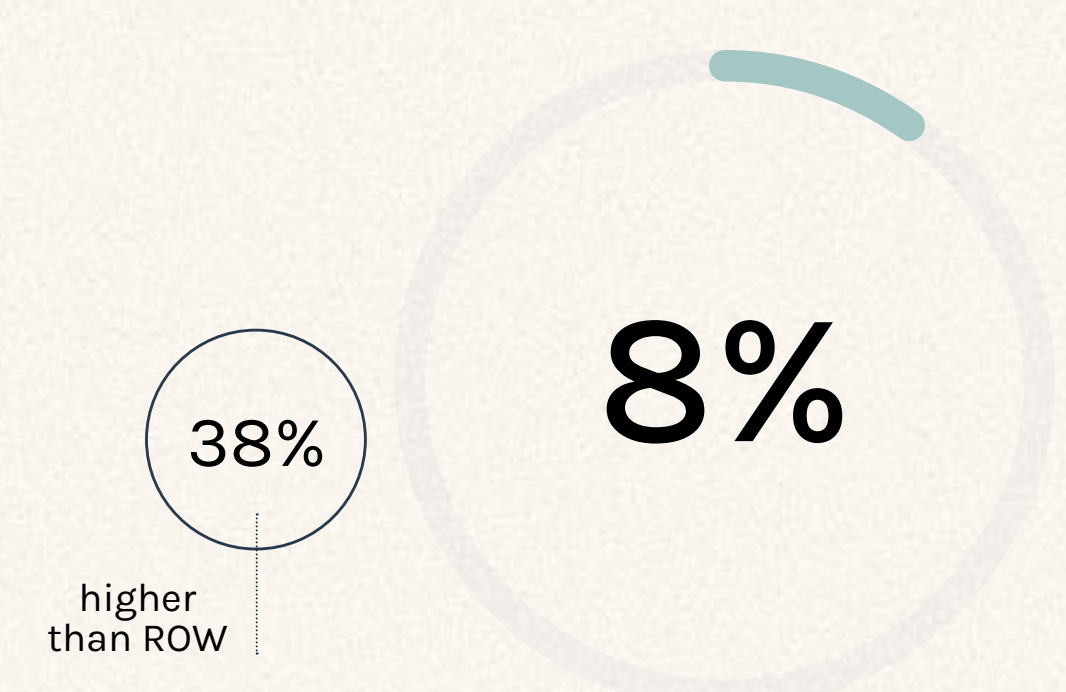
They treat me like I am a VIP



They communicate as an when necessary, e.g. to tell me about offers or update me on transactions



We communicate with each other like we have a good relationship and they understand me



I don't hear from them unless I get in touch because I have a problem or need information

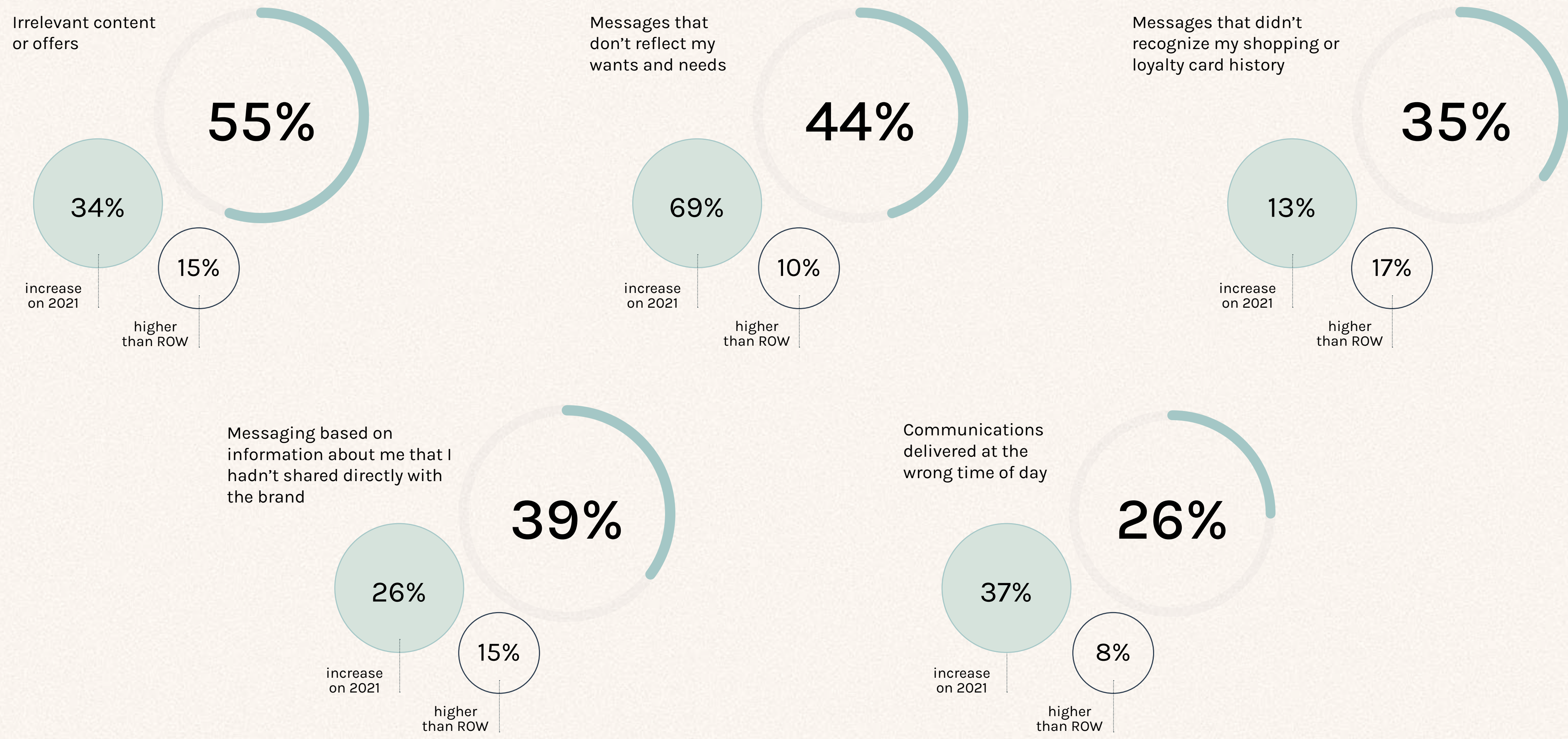
# U.S. Consumers are Not Happy with the Personalization They Receive

U.S. consumers are frustrated with the lack of personalized messaging they are receiving, with over half of them feeling irked by irrelevant content or offers (55%) - a 34% increase on last year. In the data economy, where brands have huge portfolios of data on their customers, these numbers tell us personalization initiatives are getting worse, not more attuned.

Almost half of U.S. consumers are frustrated by receiving messages that don't reflect their wants and needs (44%), a giant 69% increase on 2021, and 39% felt friction when they received messaging based on information about them that hadn't been shared directly with the brand.

Personalization is the core of relationship marketing. That means it's about delivering value, relevancy and creating meaningful experiences to individuals based on their own preferences and data.

# Thinking about all the brands that have communicated with you regularly in the last six months, have you experienced any of the following frustrations when you received...





# U.S. Consumers Are Pretty Happy With the Amount of Messaging They Receive From Brands

Whether through email, apps, social media or SMS, U.S. consumers are generally pretty content with the volume of messages they receive from brands.

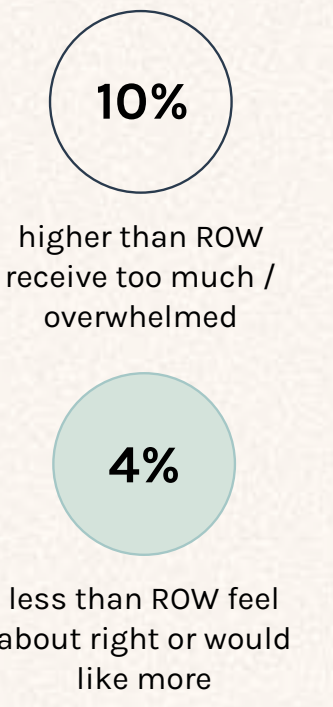
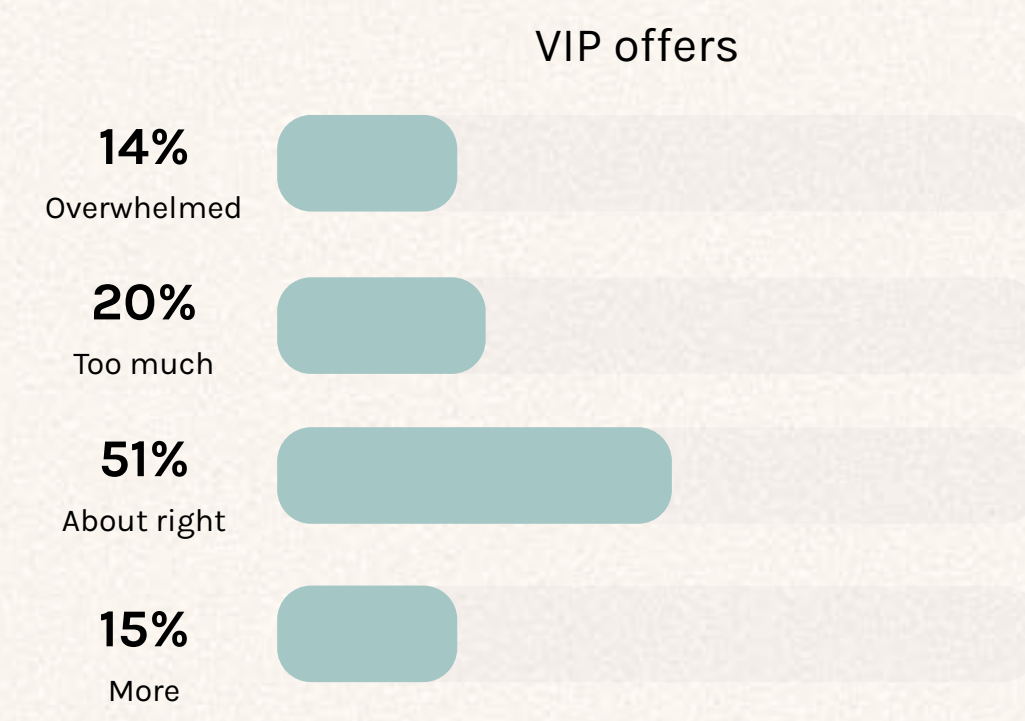
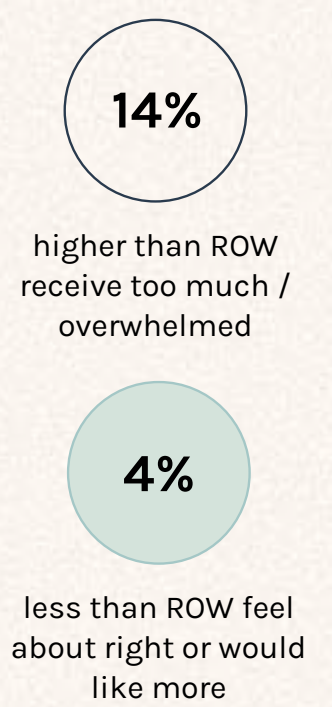
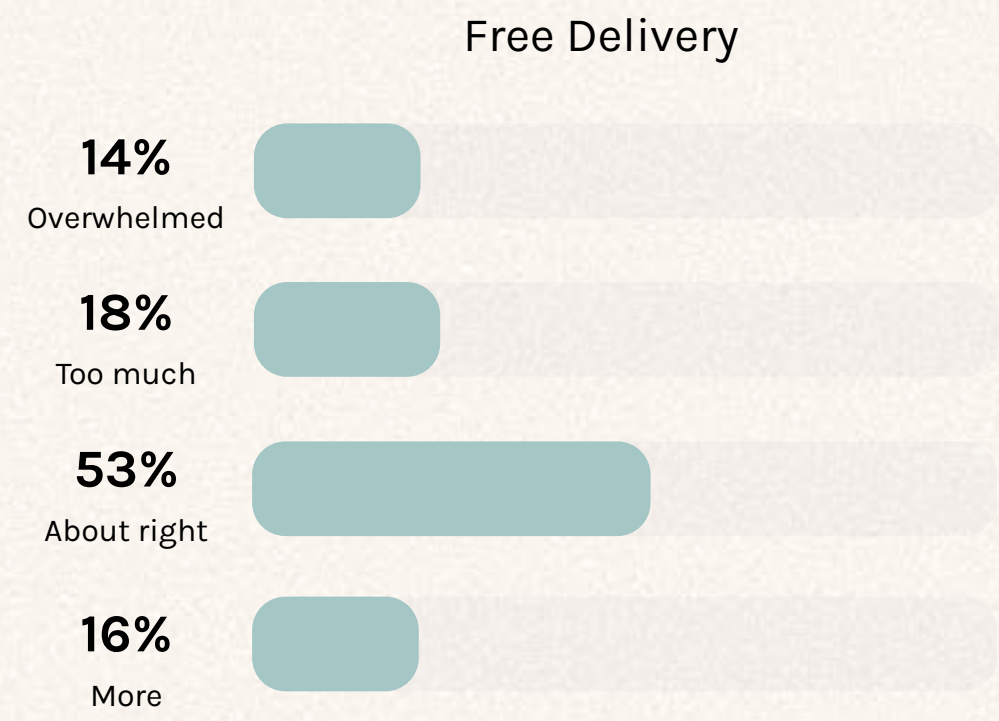
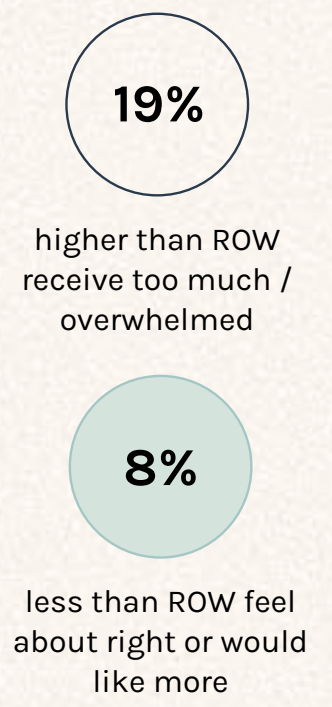
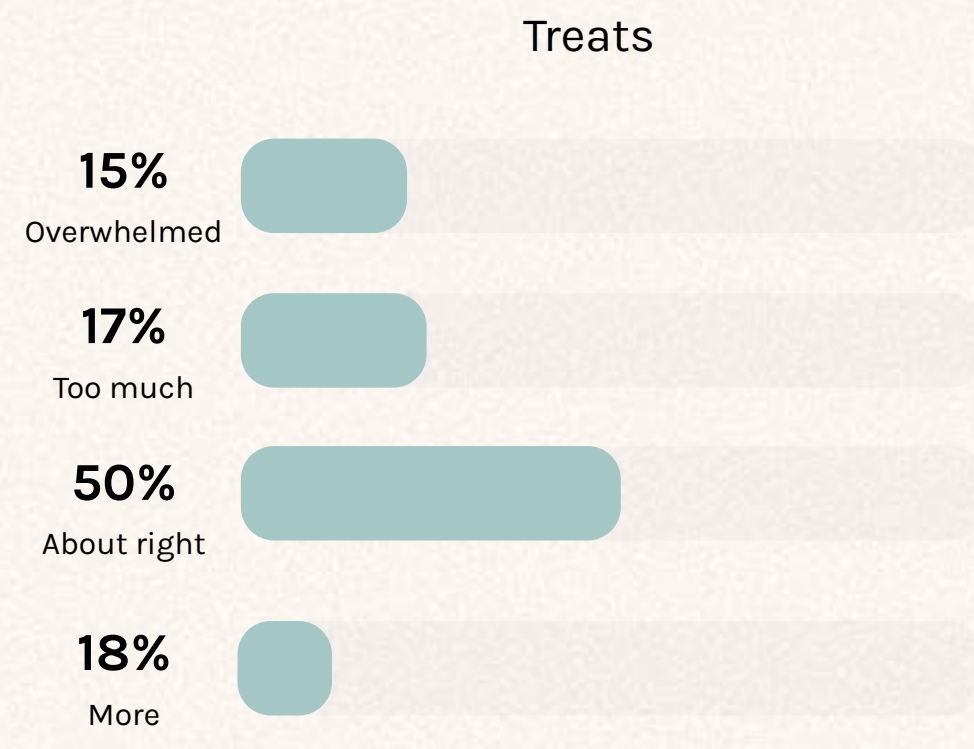
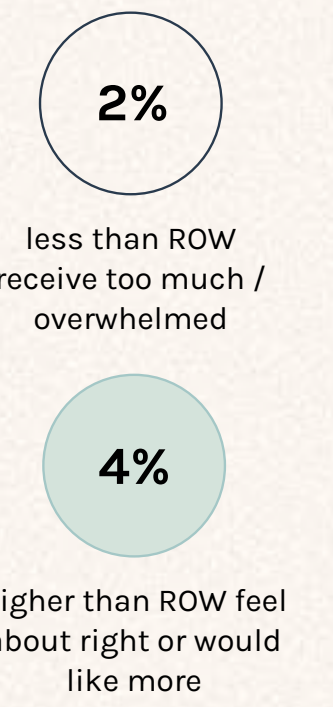
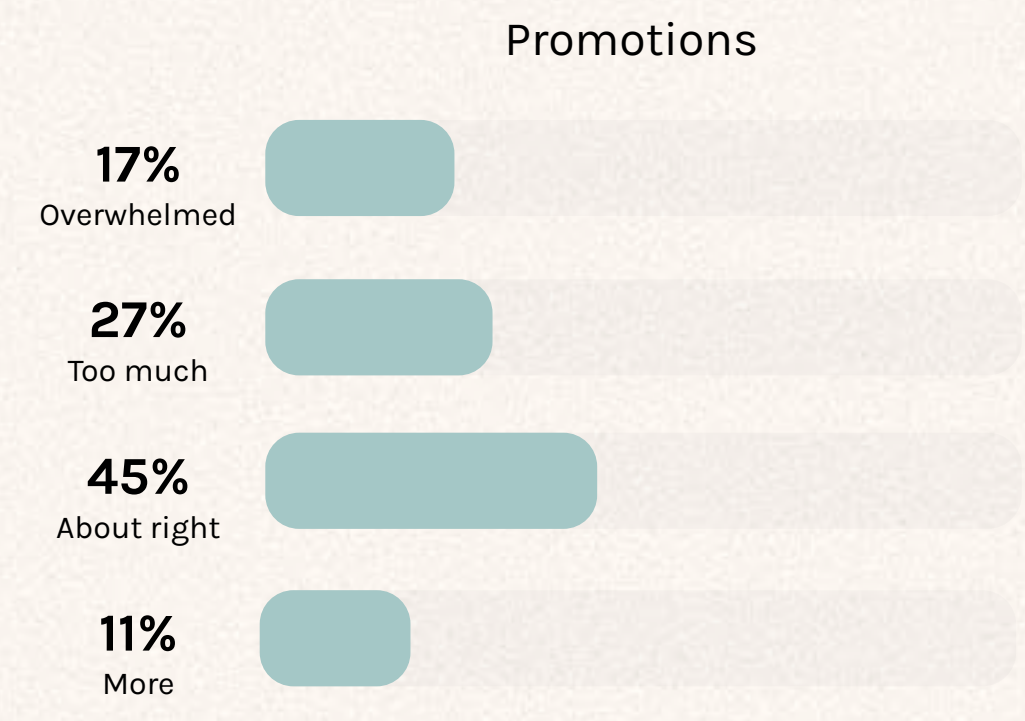
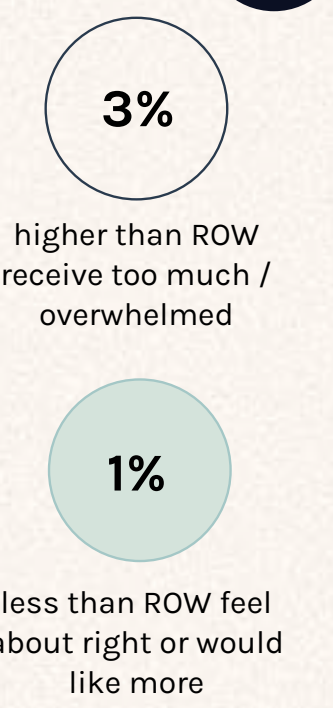
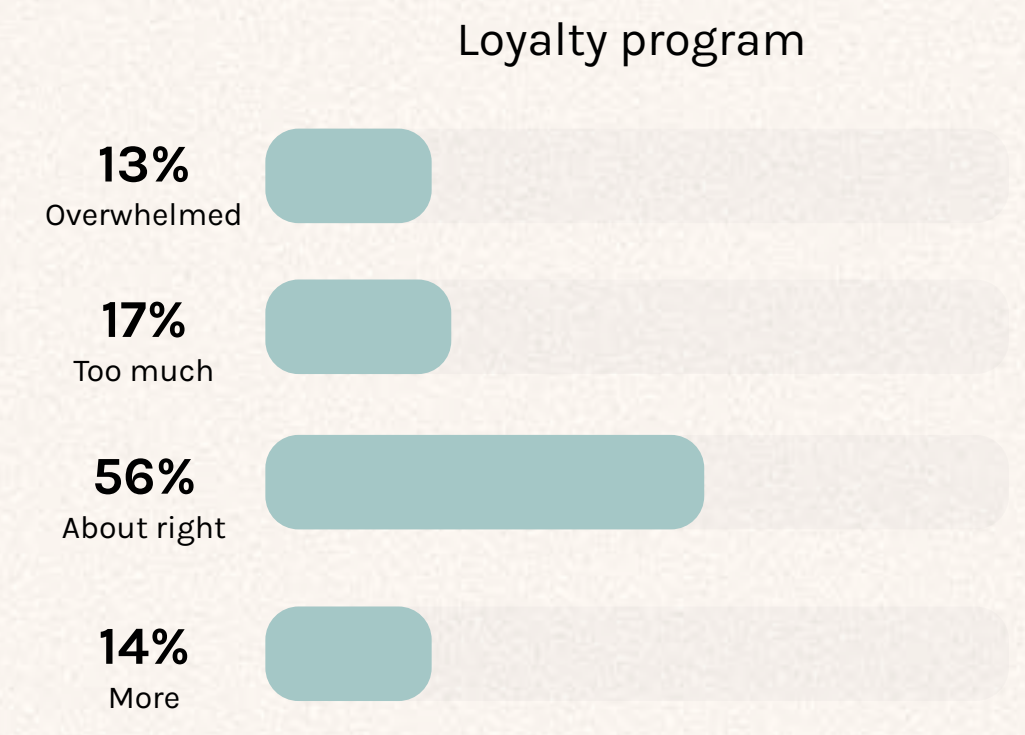
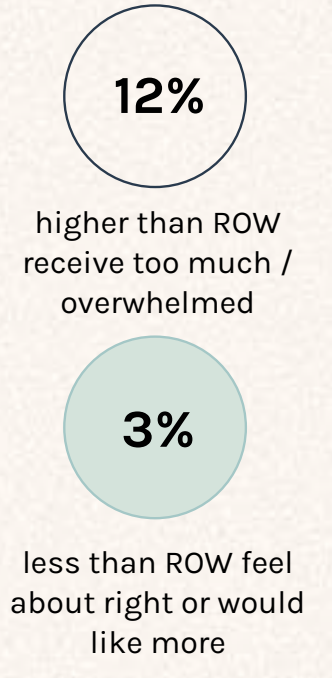
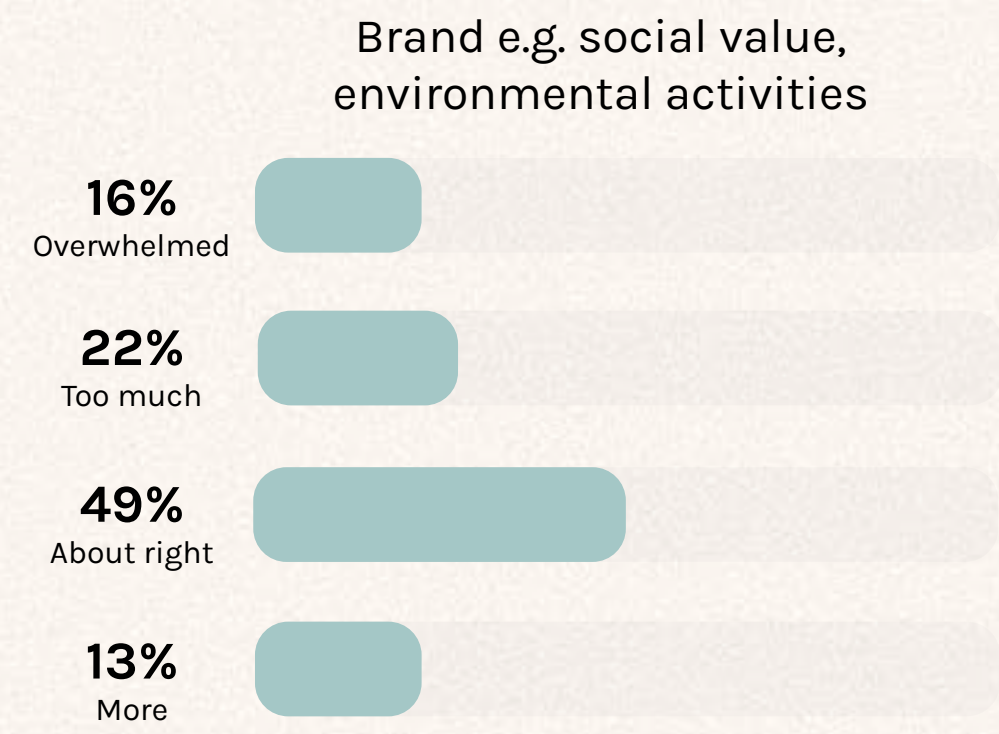
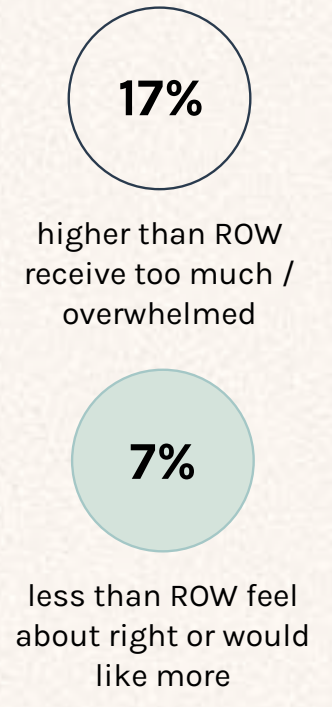
When it comes to being “about right” or would like to receive more messaging, the numbers are positive. U.S. consumers feel they get the perfect amount of or would readily receive more messaging about discounts (66%), brand values (62%), loyalty program (70%), VIP offers (66%), treats (68%), free delivery offers (69%), and promotions (56%).

In every instance apart from promotions, U.S. consumers are more inclined to to feel “overwhelmed” by messaging than their peers around the world. Those brands that win master the craft of connecting with their customer on the right channel, with the right message, at the right time.





# Thinking about the messages you get from the brands you engage with, do you see too many, or too few messages about...





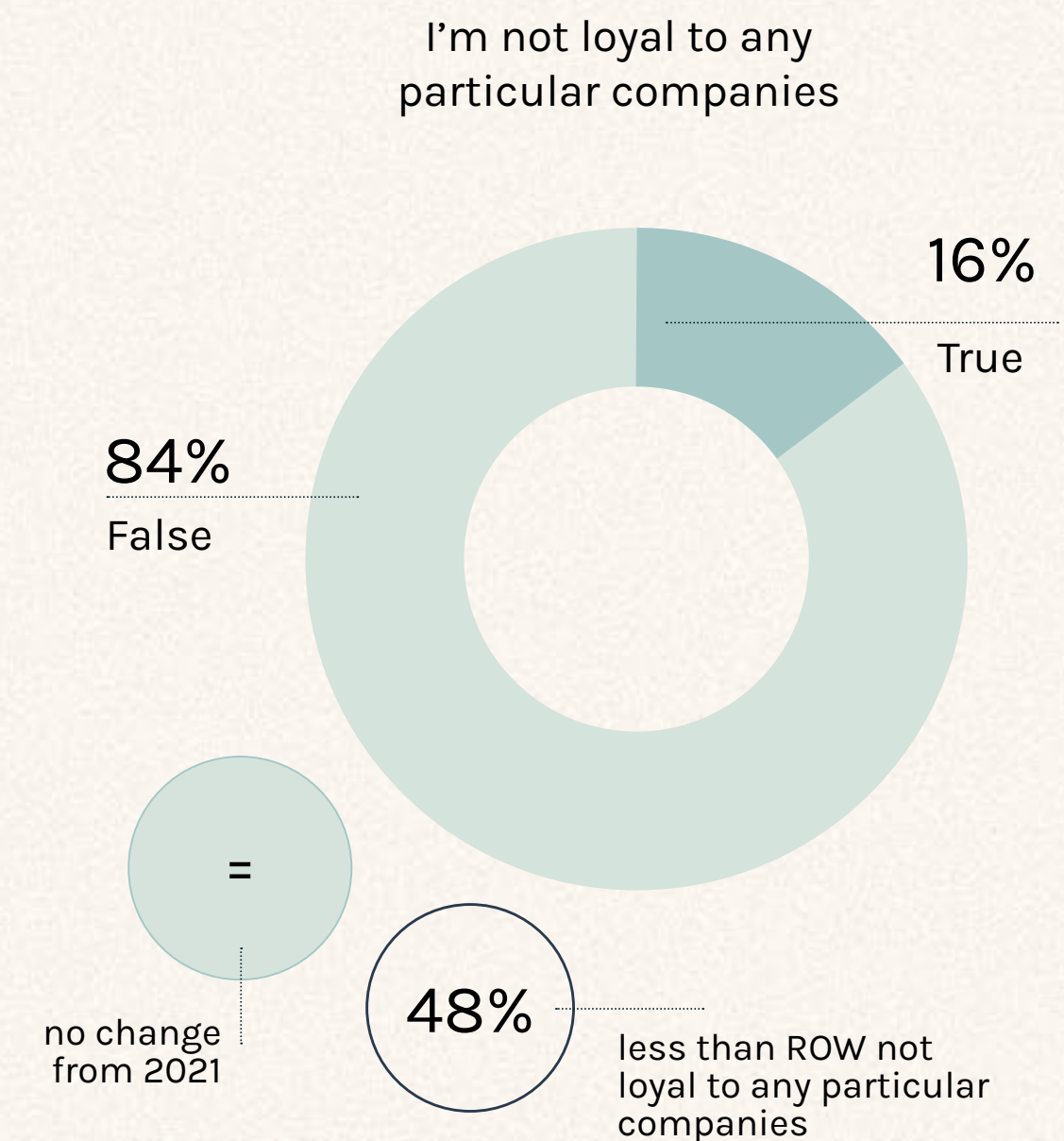
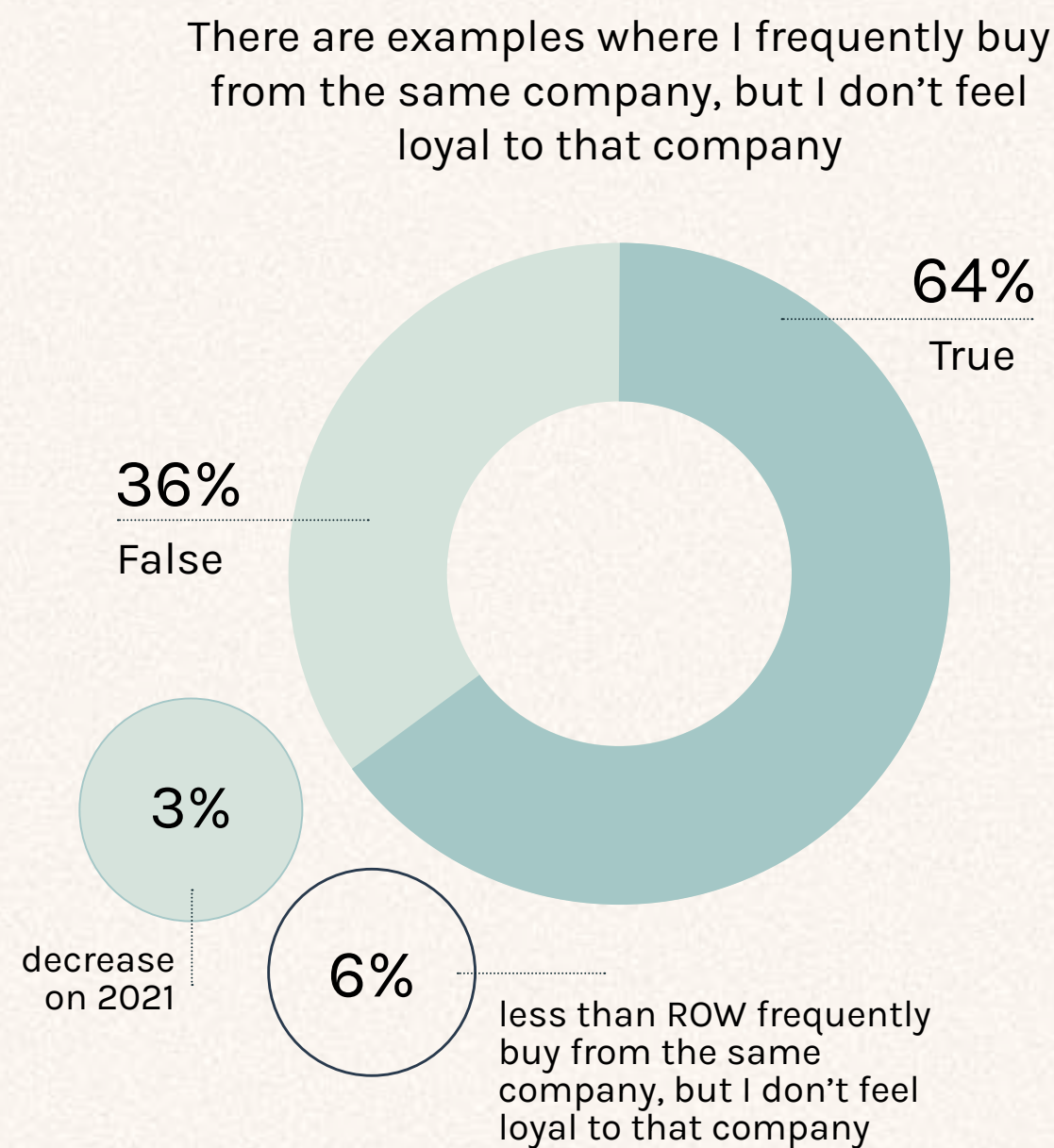
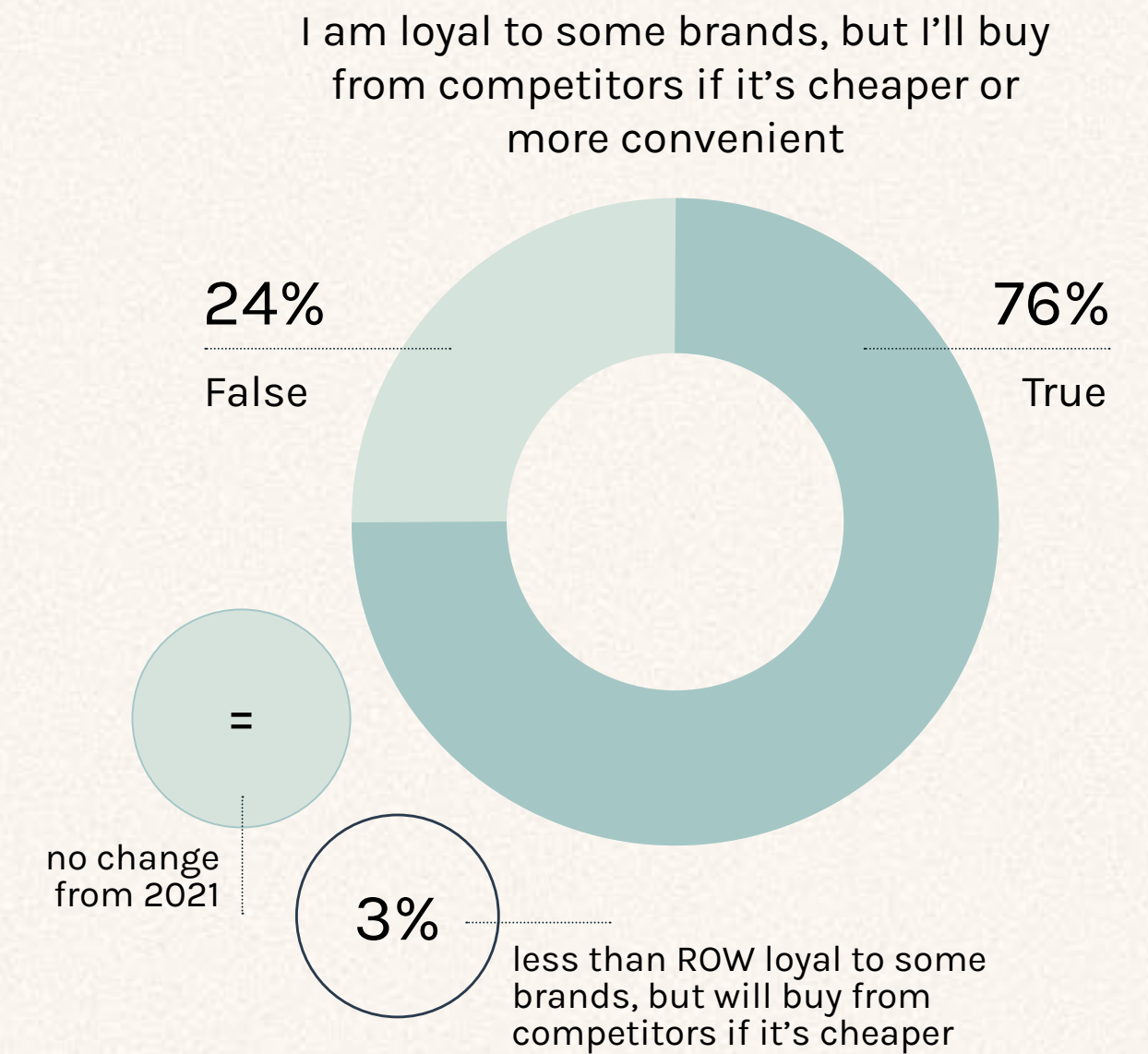
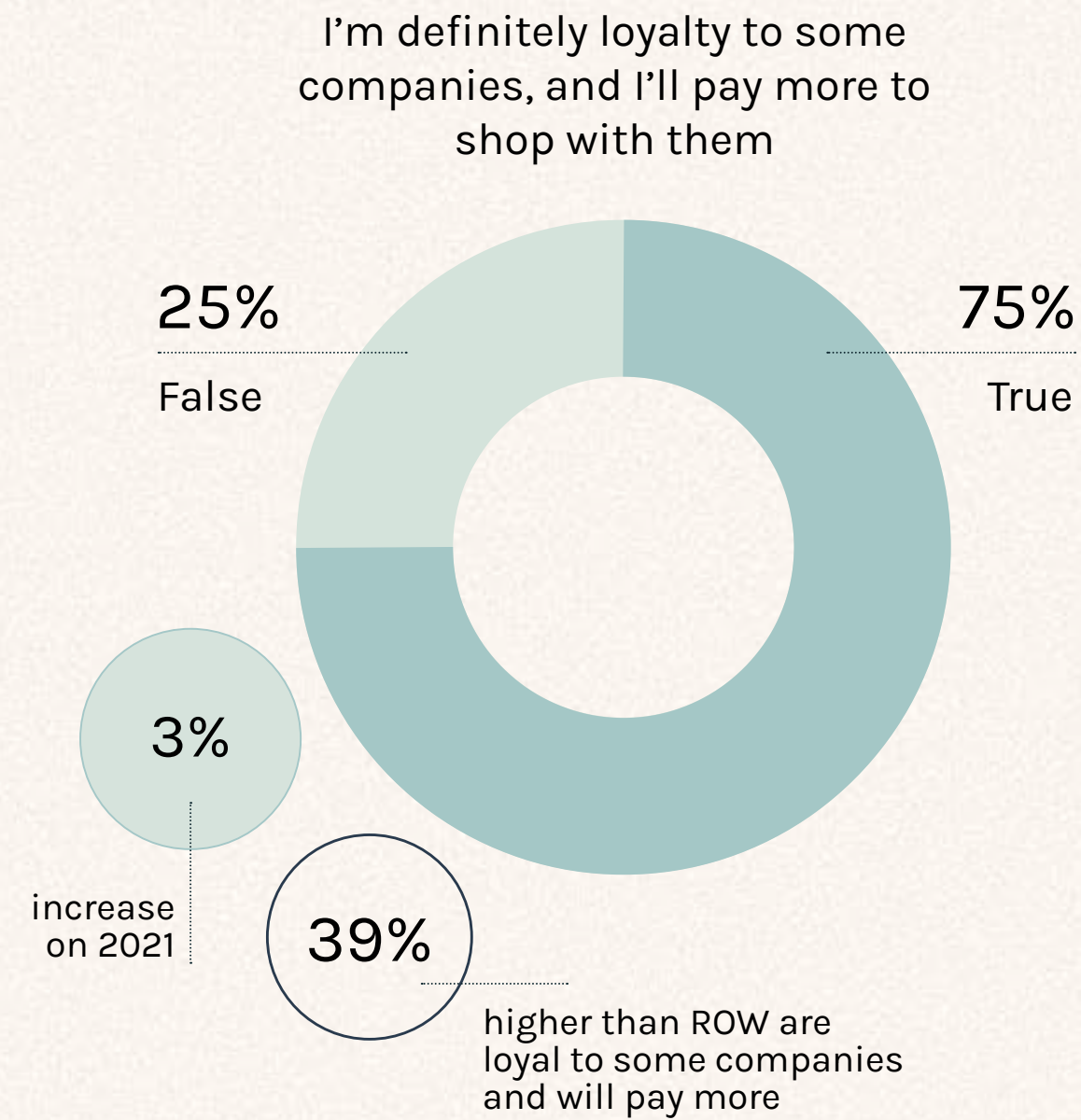
# U.S. Consumers are Loyal by Nature

U.S. consumers enjoy the benefits that come from being loyal to a brand. The most unambiguous way they can show they trust your brand is to pick you over the competition, have affinity for your products, and believe in your brand promises, as well as being prepared to pay a little bit extra for it. A mighty 75% of consumers identify this way - 39% higher than the rest-of-the-world.

However the real story here is that almost two-thirds (64%) of U.S. consumers say there are examples where they frequently buy from the same company, but don't feel loyal to that company; and 76% say they are loyal to a particular brand, but will look elsewhere if it's cheaper or more convenient. A mere 16% of U.S. consumers are not loyal to any particular companies, 48% less than the rest-of-the world, so if you don't have a fully-fledged strategy to turn one-of customers into loyal brand advocates, you're leaving sales on the table.



**Brands want to have loyal customers who prefer them to competitors. Thinking about how you've shopped, the brands you've bought from and your personal brand loyalties in the last six months, are the following statements true or false?**

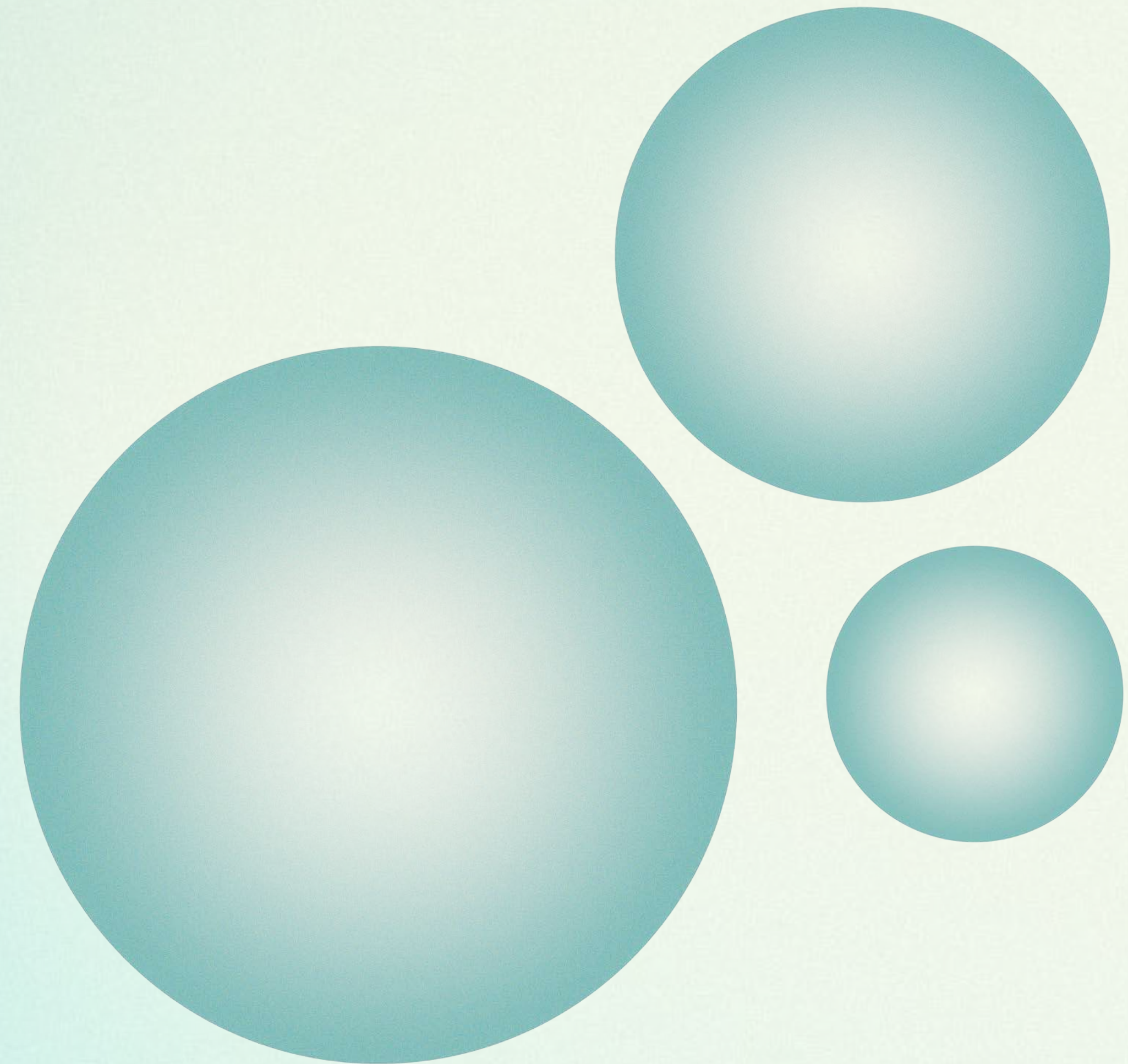




# A Good Loyalty Program... is a Top Loyalty Driver

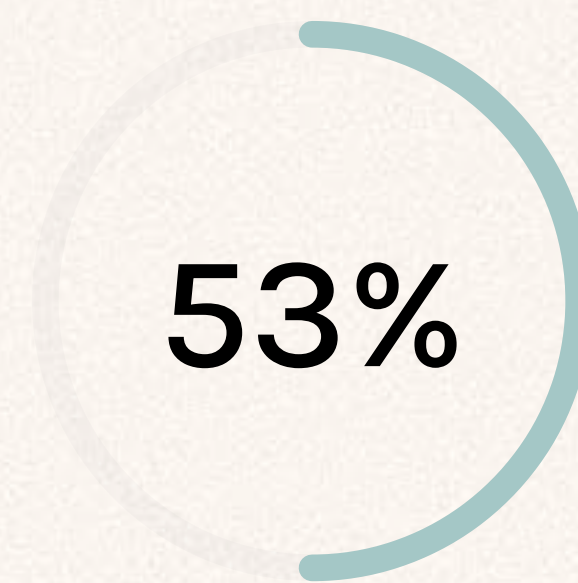
There are many factors that drive brand loyalty, and the top drivers are fairly simple: have a great product or service (53%) and good customer service (41%). Following on from that, well over a third of U.S. consumers value a brand's loyalty program (38%), and the same for the brand being convenient to use (38%). Investments in improving these areas will ensure a long-term return and differentiate you from your competitors.

What's more, 24% of consumers are loyal to brands that are responsible with their data, with modern consumers more up-to-date with privacy legislation and the responsibilities of the brands they do business with.

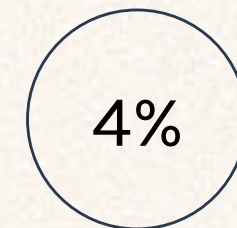




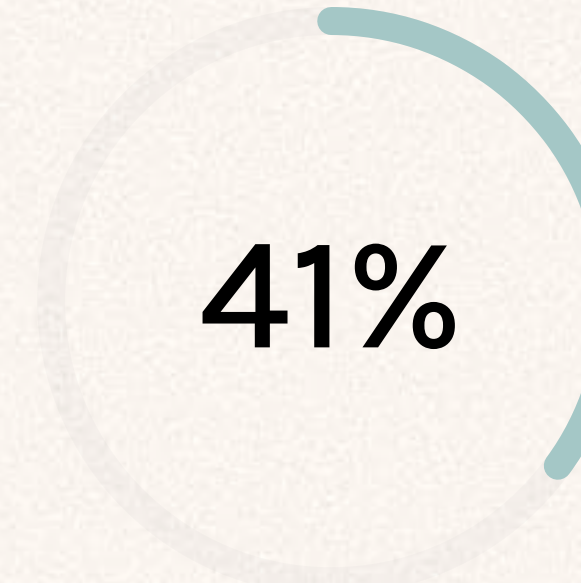
# Thinking about the brands you are most loyal to, what are the top three things that make you loyal to certain brands?



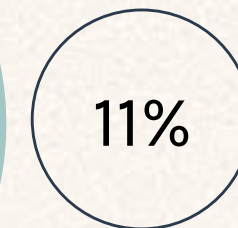
They have great products/services



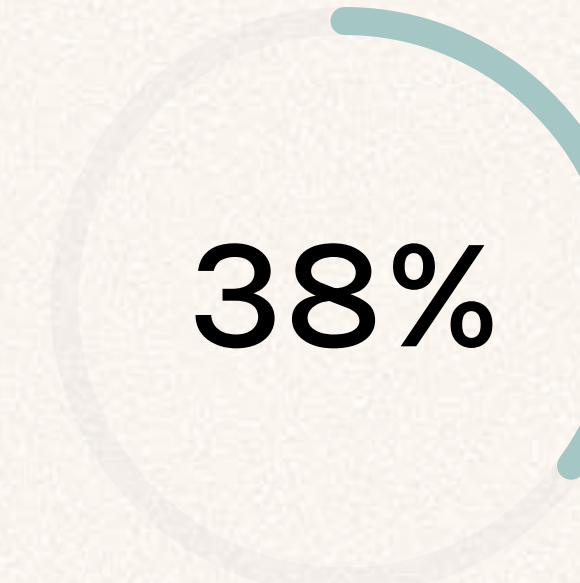
less than ROW



They have great customer service



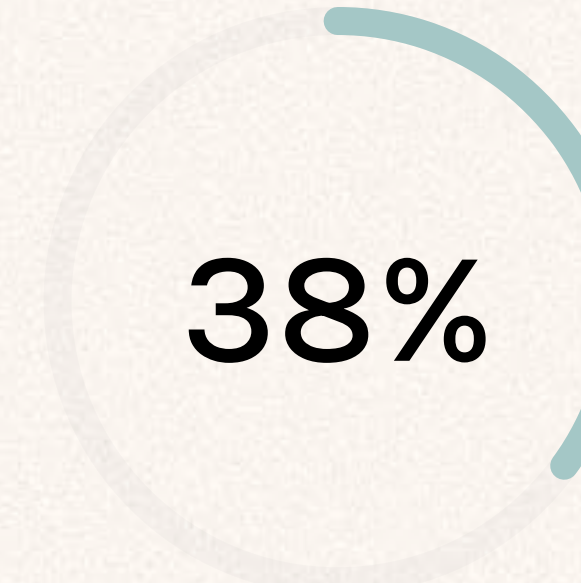
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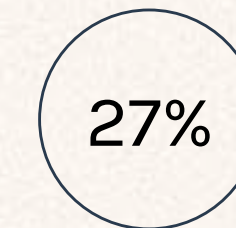
I like their loyalty program, and they provide value to me to stay loyal



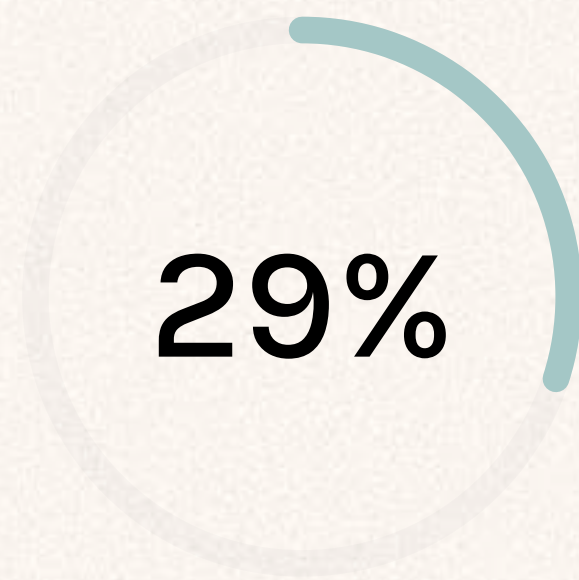
higher than ROW



They're very convenient to use



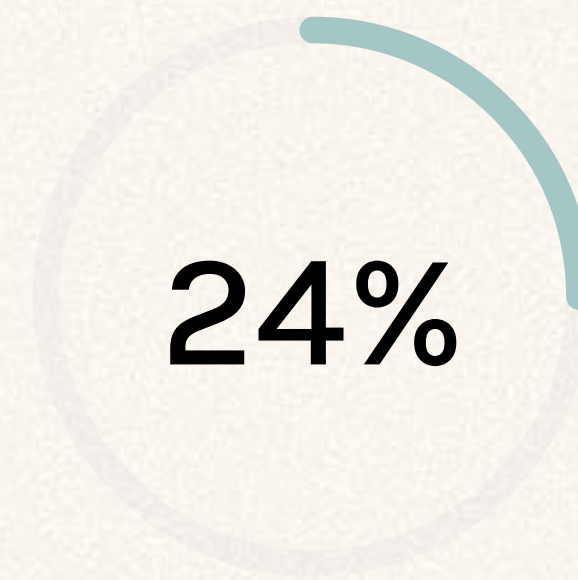
higher than ROW



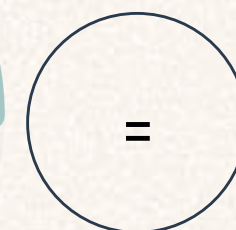
They feel safe buying from



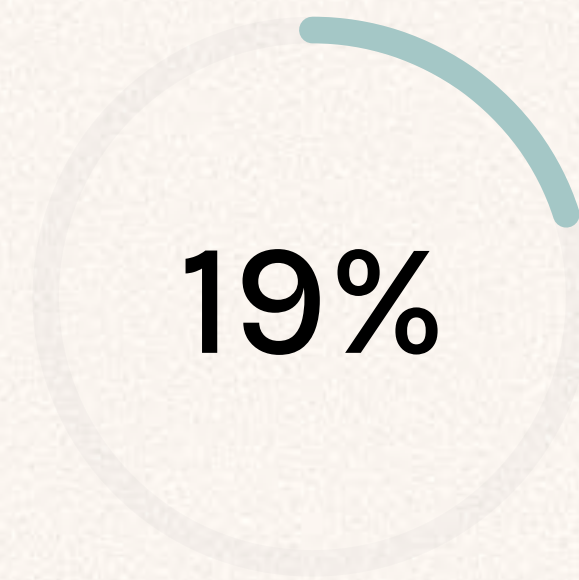
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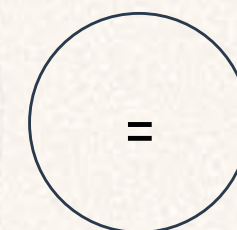
I trust them to treat my data with respect



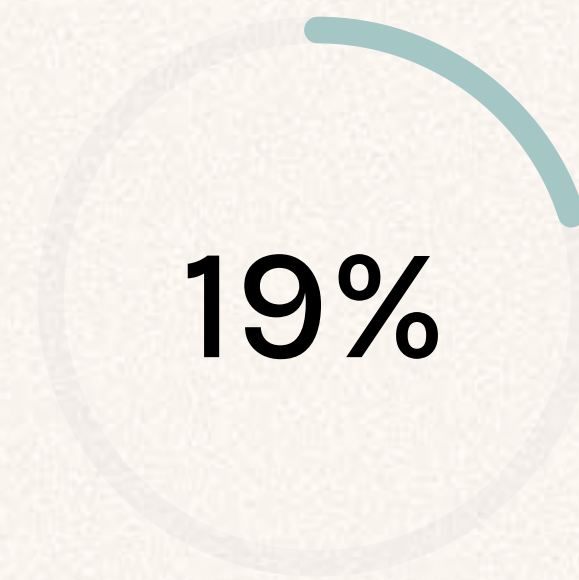
same as ROW



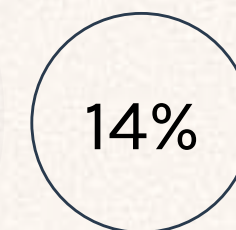
The brand aligns with my personal values and beliefs e.g. on environmental or political issues



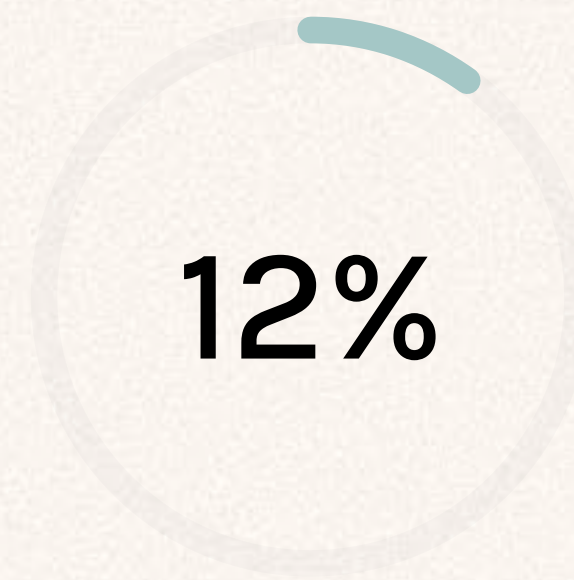
same as ROW



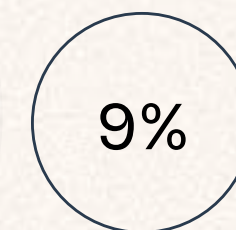
They seem to understand what I need



less than ROW



They work hard to build a relationship with me



higher than ROW

# The Core of Loyalty is Not Merely the Cheapest Price

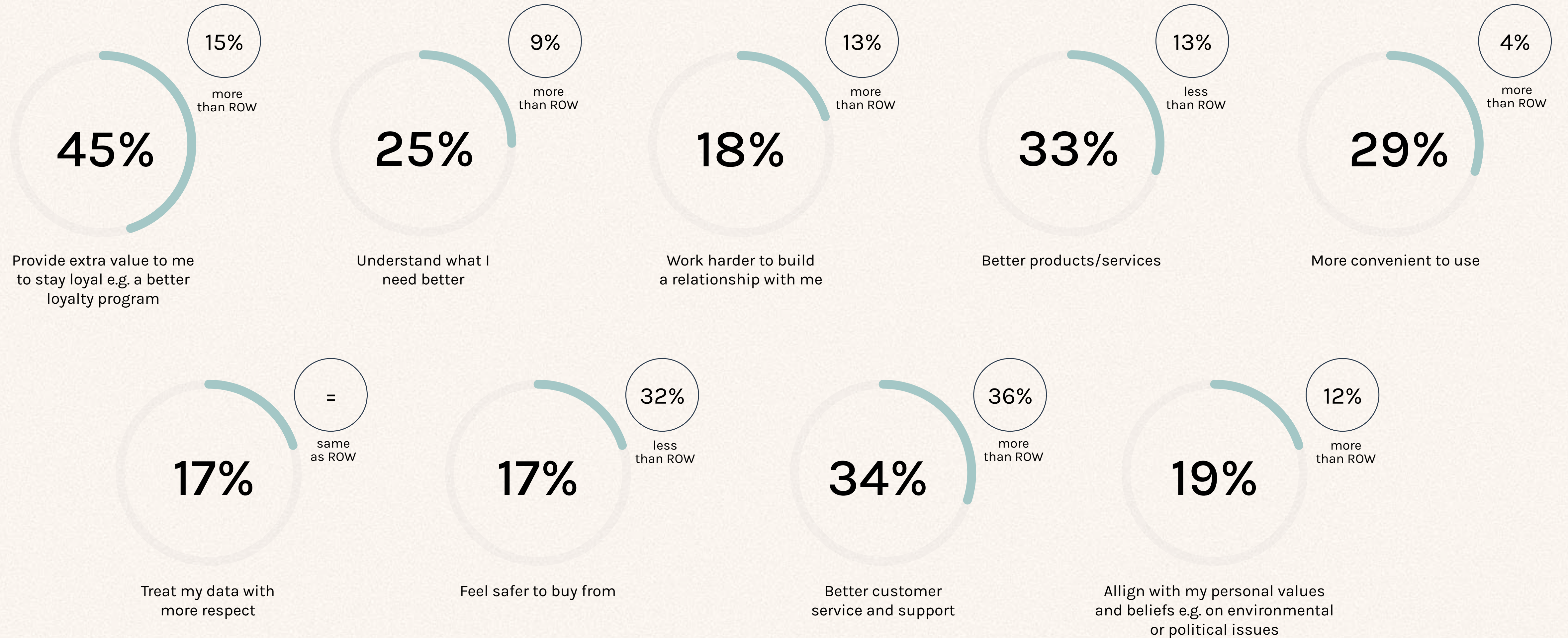
Brands are perpetually working to envision new and interesting ways to keep their customers engaged, retained, and loyal in a world full of infinite choices. In this era of the digitally savvy consumer, traditional loyalty program models are becoming outdated — too transactional, too stale, and not effective in significantly changing consumers' perception or behavior.

Brands that provide extra value for the customer to stay loyal (45%), feeling safe to buy from (17%), understanding the customer as an individual (25%), and treating data with respect (17%), were the key drivers.

When contrasted to its global peers, 15% more U.S. consumers wanted a better loyalty programme, 36% better customer service and support and 9% to have their preferences understood better.



# You said you sometimes “Buy frequently from the same company, but don’t feel loyal to that company.” What would make you feel closer to that brand?



# The Cost of Getting Loyalty Wrong

Almost a third (30%) of U.S. consumers have switched away from a brand they previously liked to buy from, with many citing a competitor having better promotions (27%), better buying options (27%), or because they didn't feel valued as a customer (19%).

One huge trend is 30% of U.S. consumers switching brands because of its stance on social, political, or environmental issues - 76% higher than the rest-of-the-world and a 30% increase on 2021. With this burgeoning phenomenon of ethical consumerism, brands need to think carefully about social and political associations and the impact that can have on brand loyalty and the revenue sheet.

In the past year, have you switched away from or become less loyal to any brand you previously liked to buy from?

**30%**

Yes

**3%**

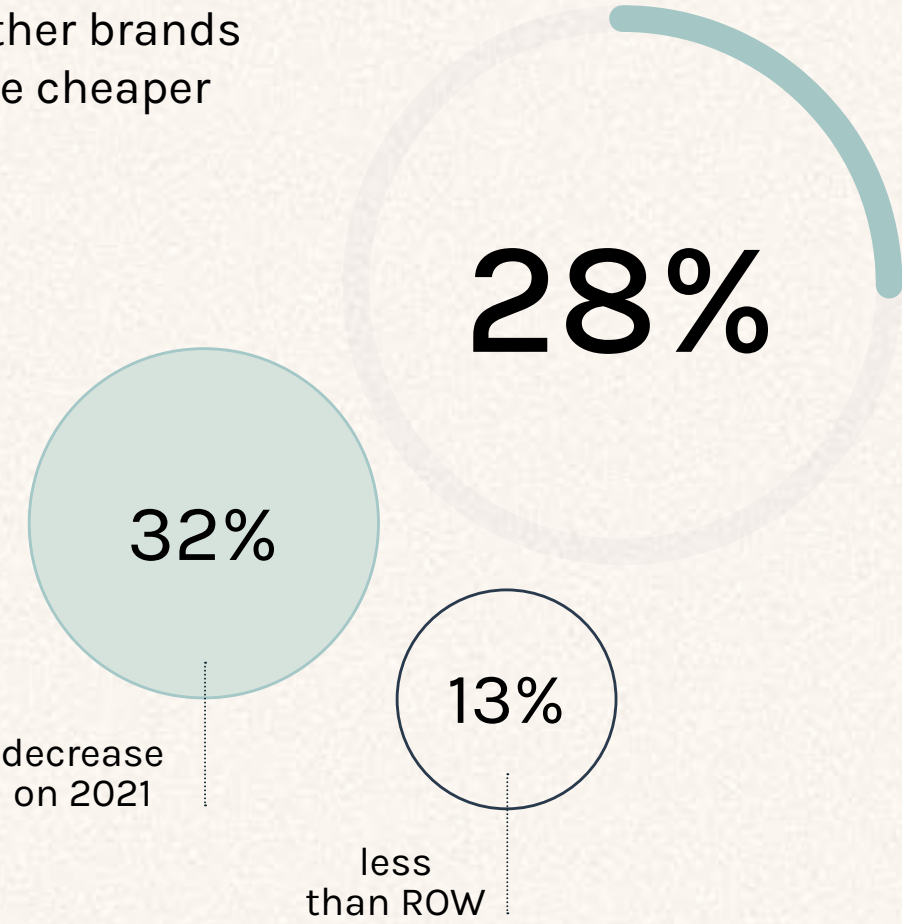
less than  
ROW



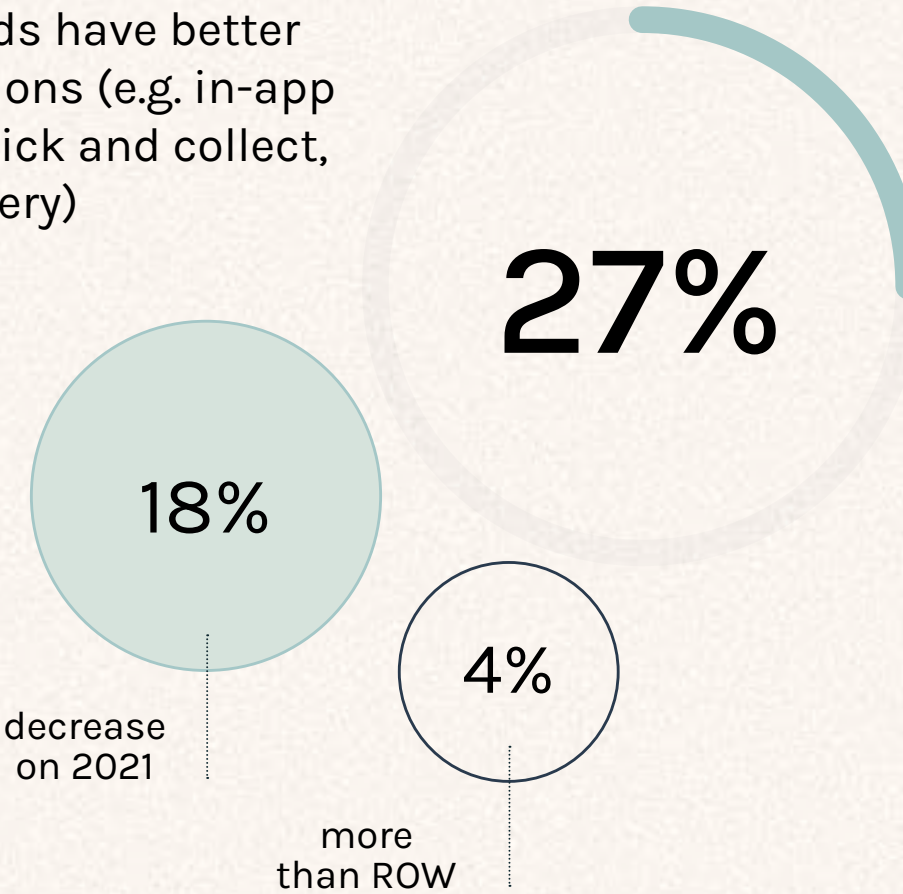
# You said you have switched away or become less loyal to a brand you previously liked. What were the reasons for this decision?



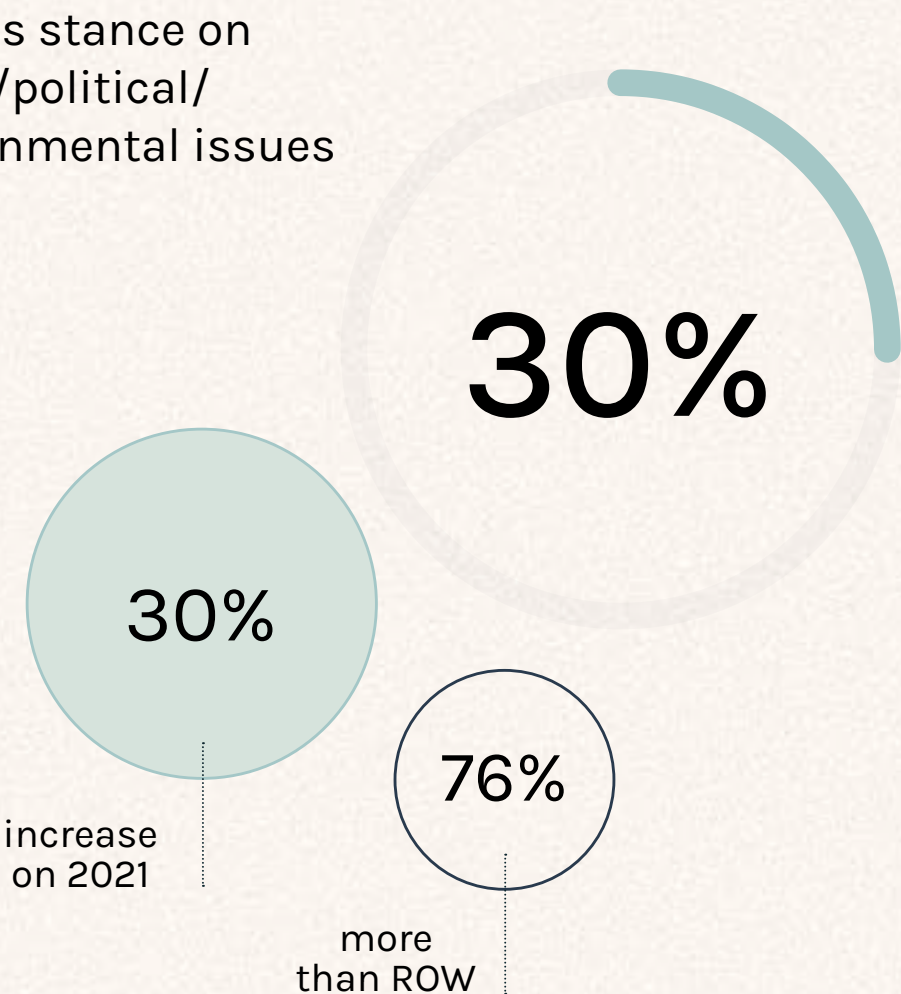
Other brands are cheaper



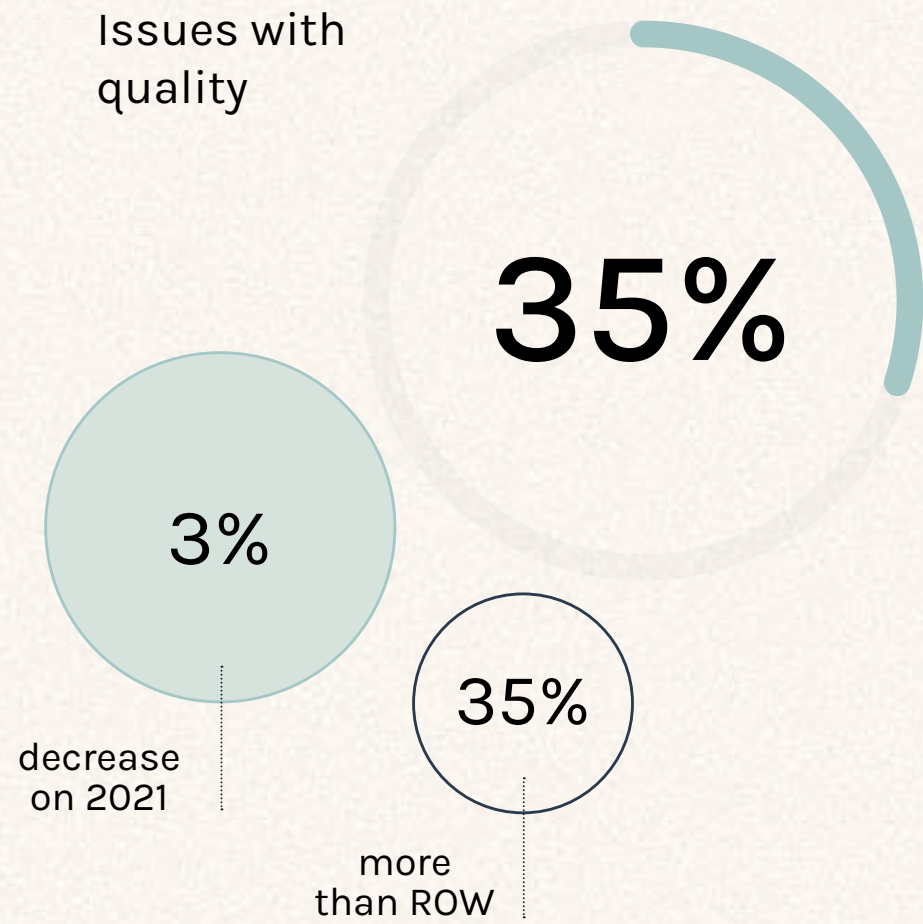
Other brands have better buying options (e.g. in-app ordering, click and collect, home delivery)



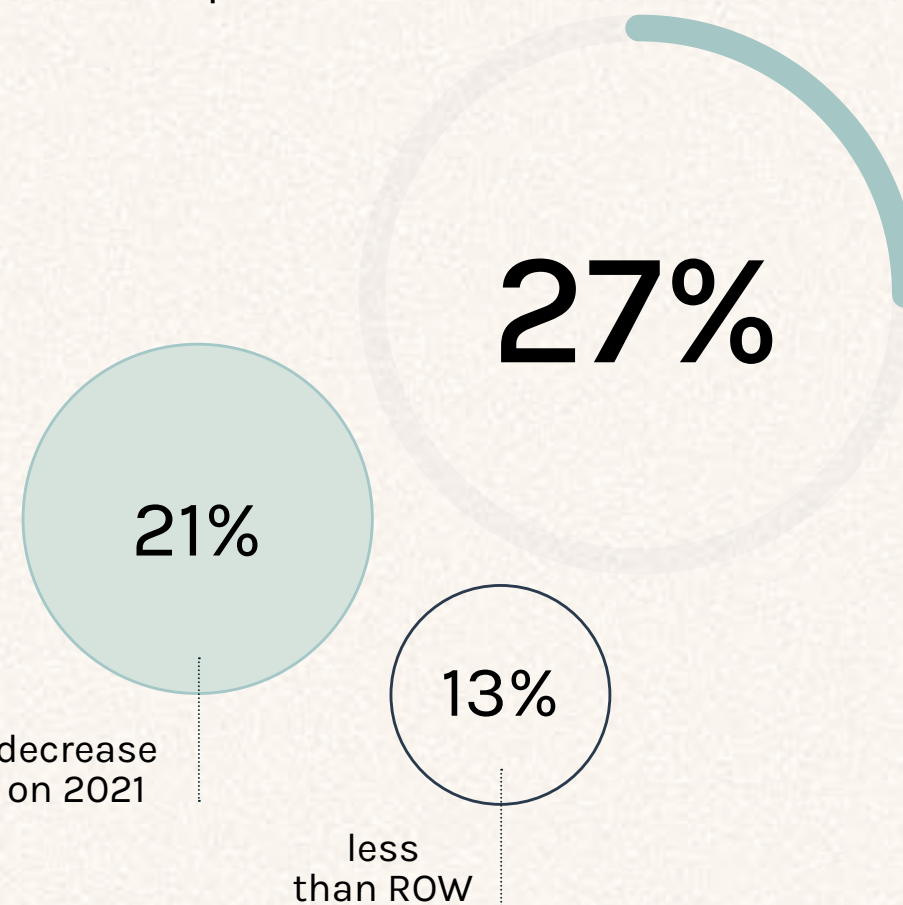
Brand's stance on social/political/environmental issues



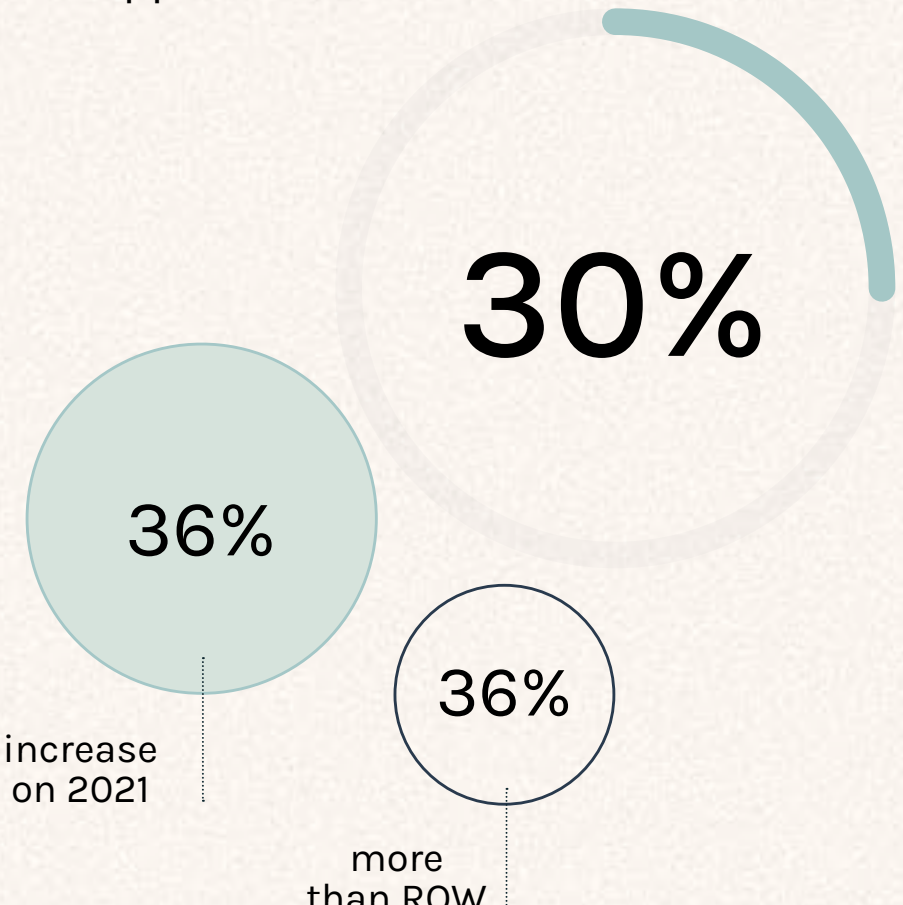
Issues with quality



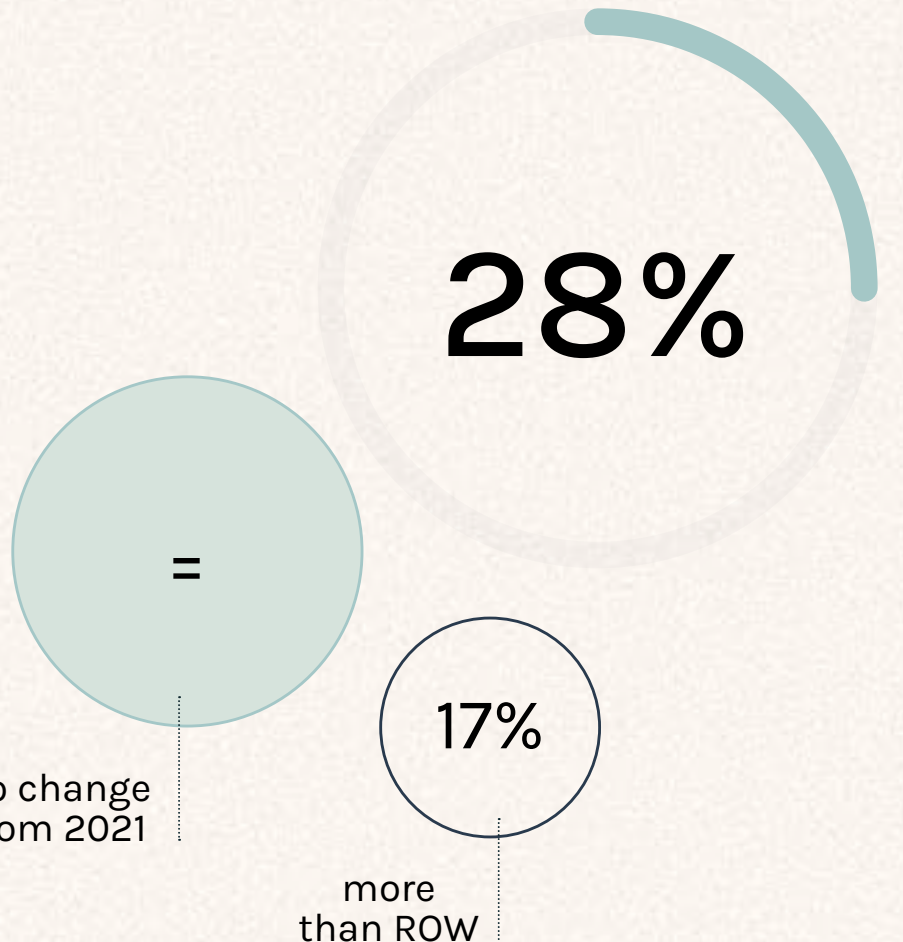
Other brands have better offers/promotions



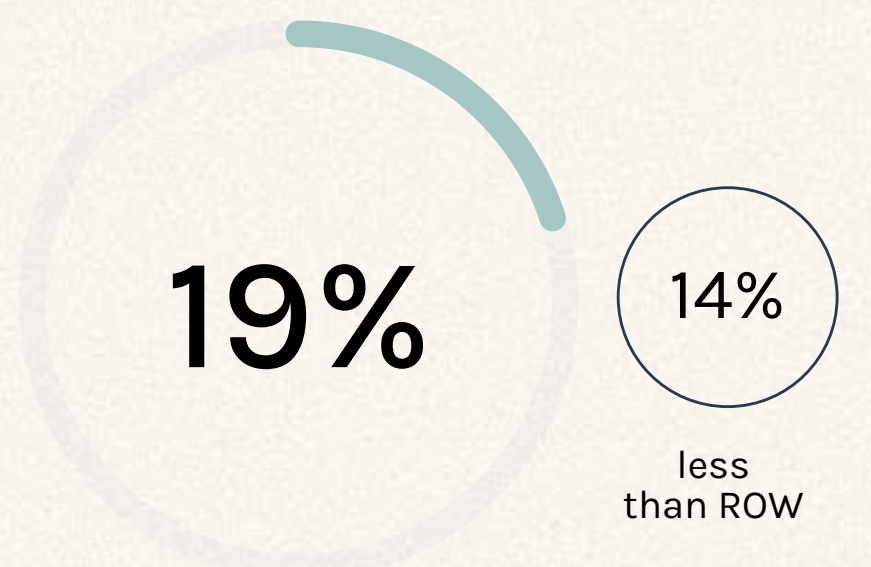
Customer service/support issues



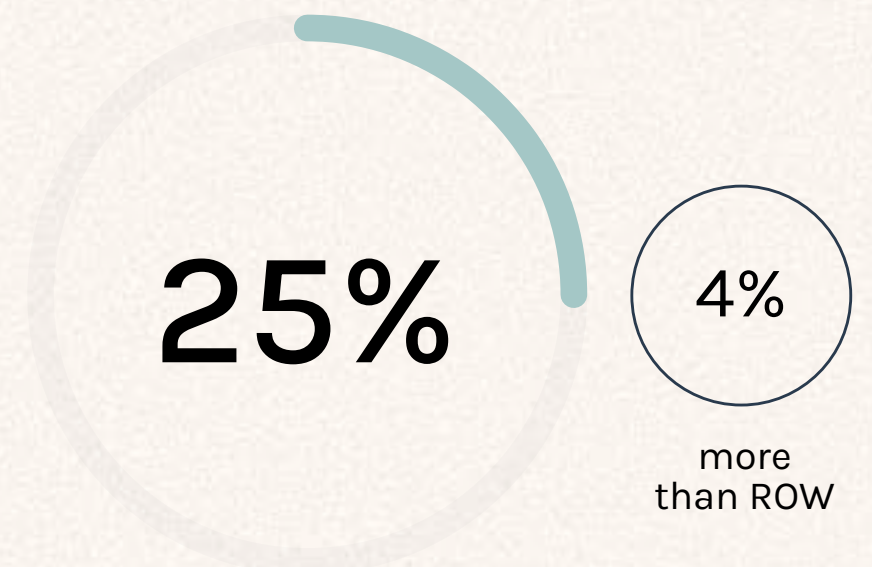
Lack of availability



I didn't feel valued as a customer



Lack of choice/range





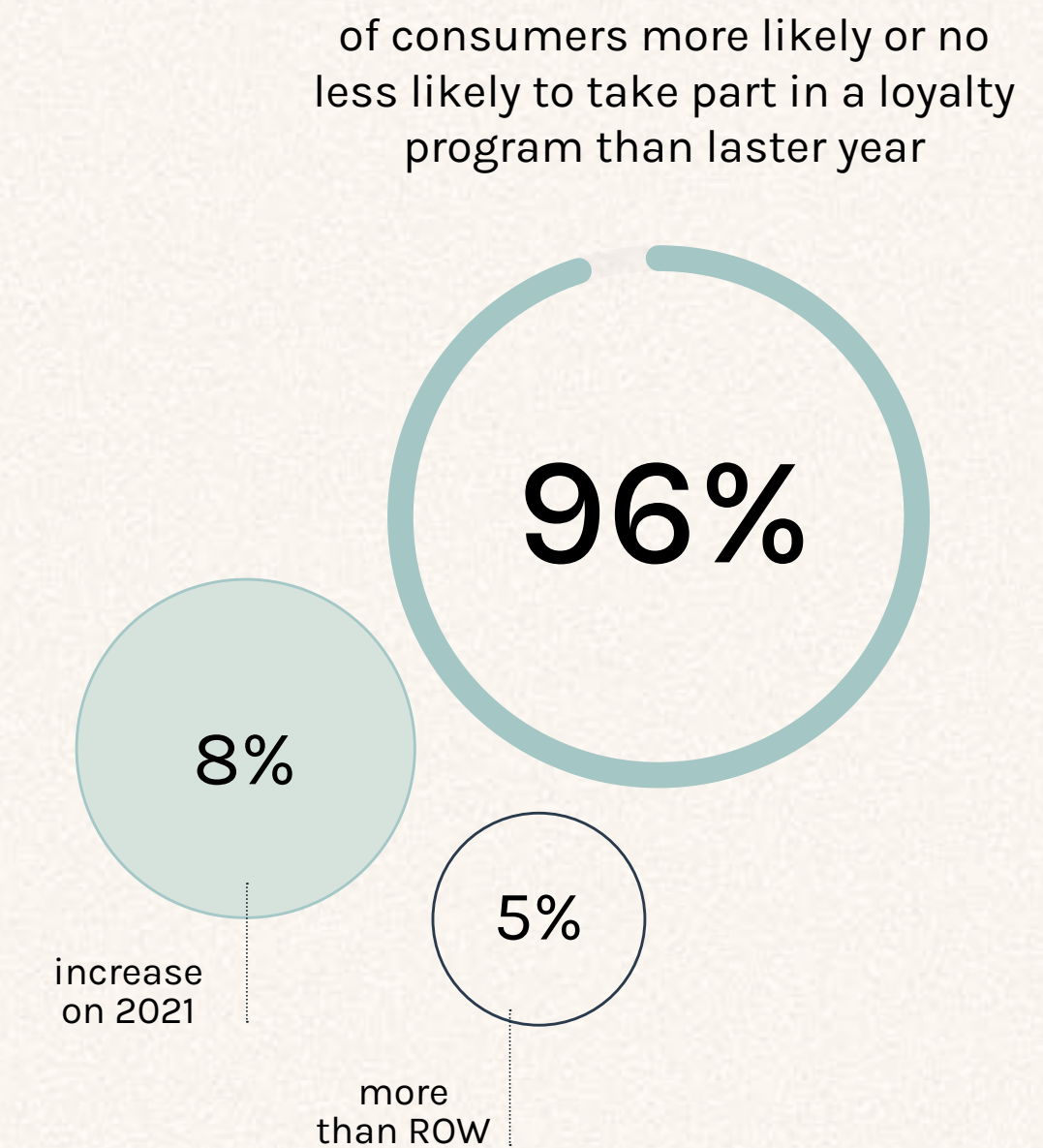
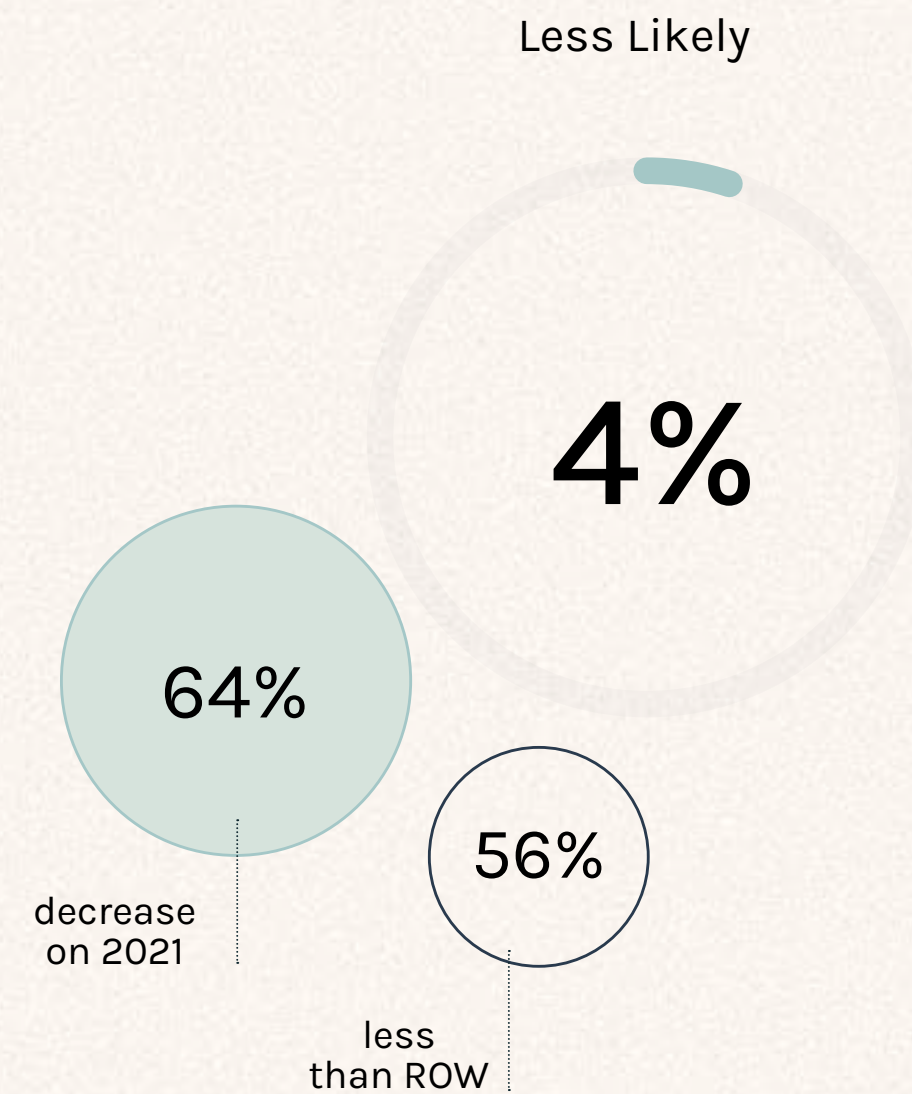
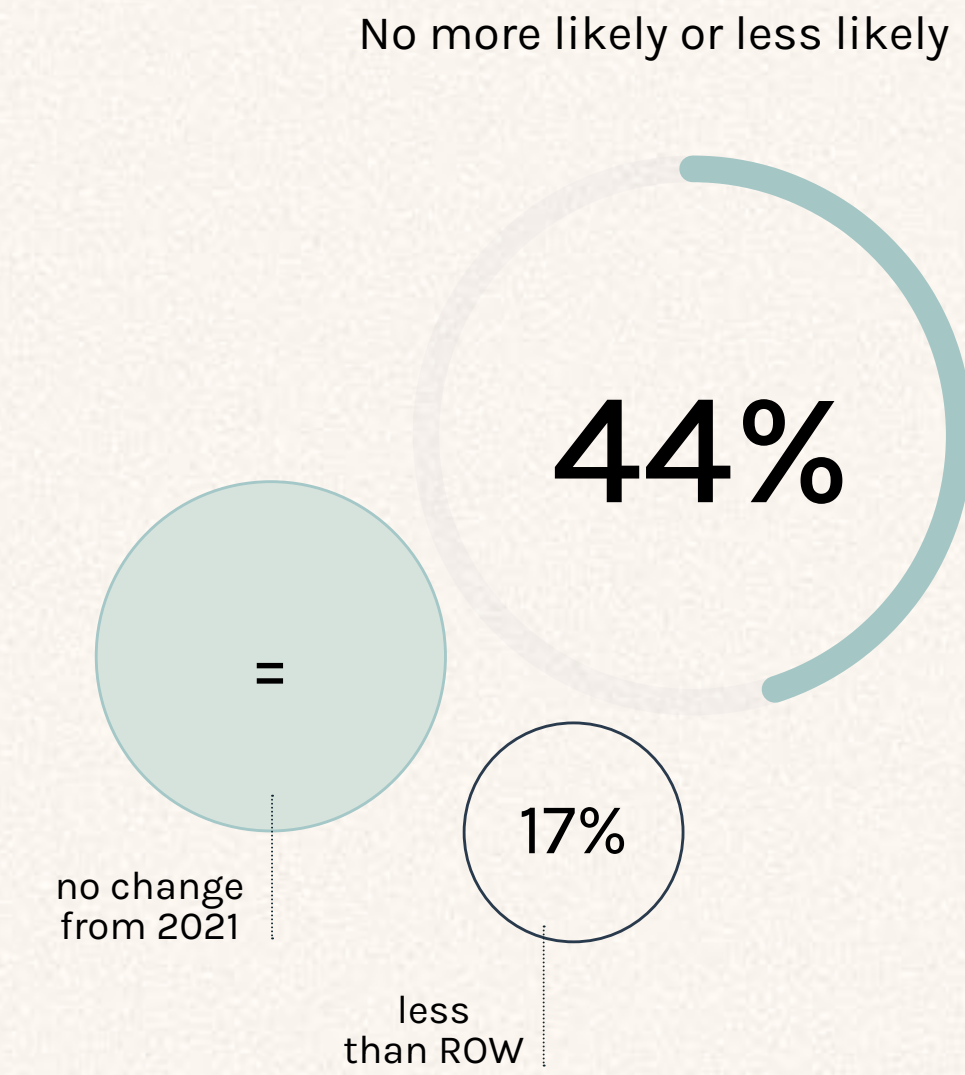
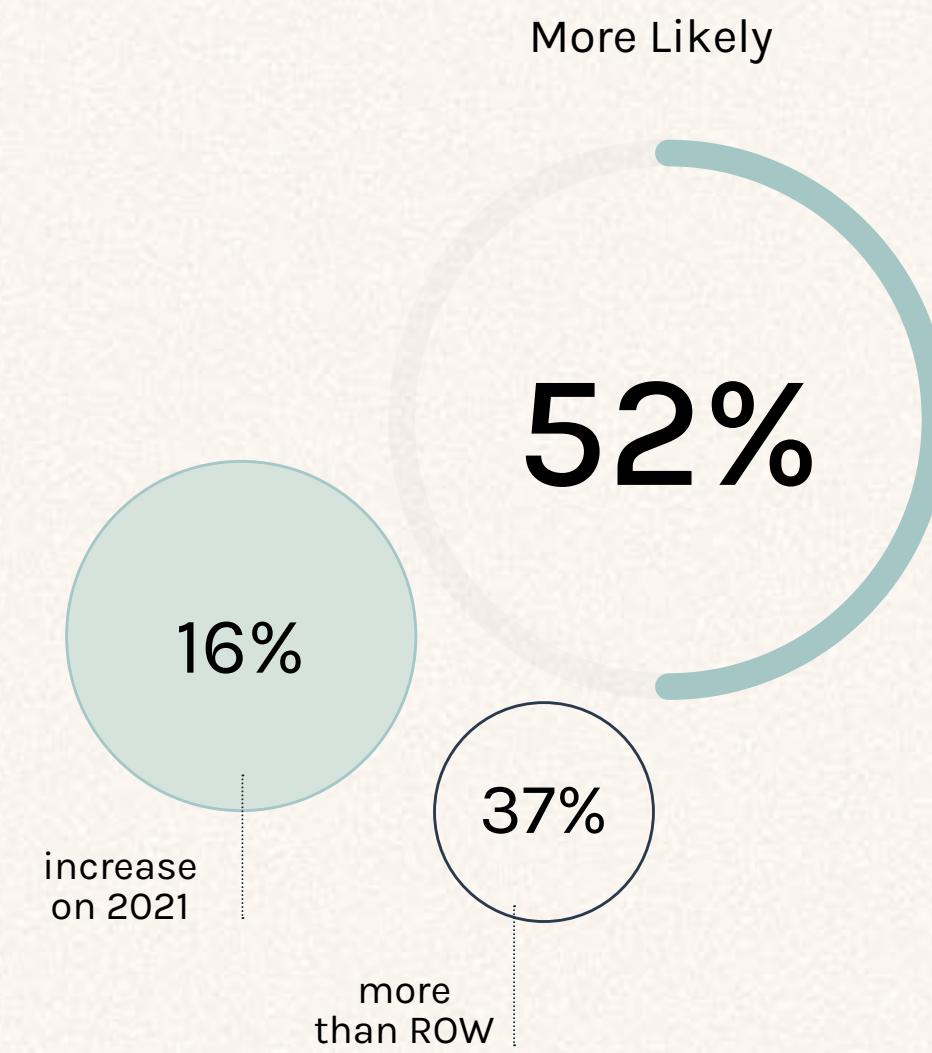
# Loyalty Program Participation is on the Rise

U.S. consumers are participating in loyalty programs, even if you are not offering one. A mere 4% of U.S. consumers are less likely to participate in a loyalty program than last year – a staggering 64% decrease on 2021 and 56% lower than consumers elsewhere around the globe. More than half of U.S. consumers (52%) are more likely to engage in brand loyalty programs this year, a 16% rise on 2021.

Loyalty programs drive sales and increase customer lifetime value – and keep profitable customers coming back – and the good news is that U.S. consumers love them and the vast majority are willing to increase their participation.



# Are you more or less likely to engage in brand loyalty programs this year than last year?





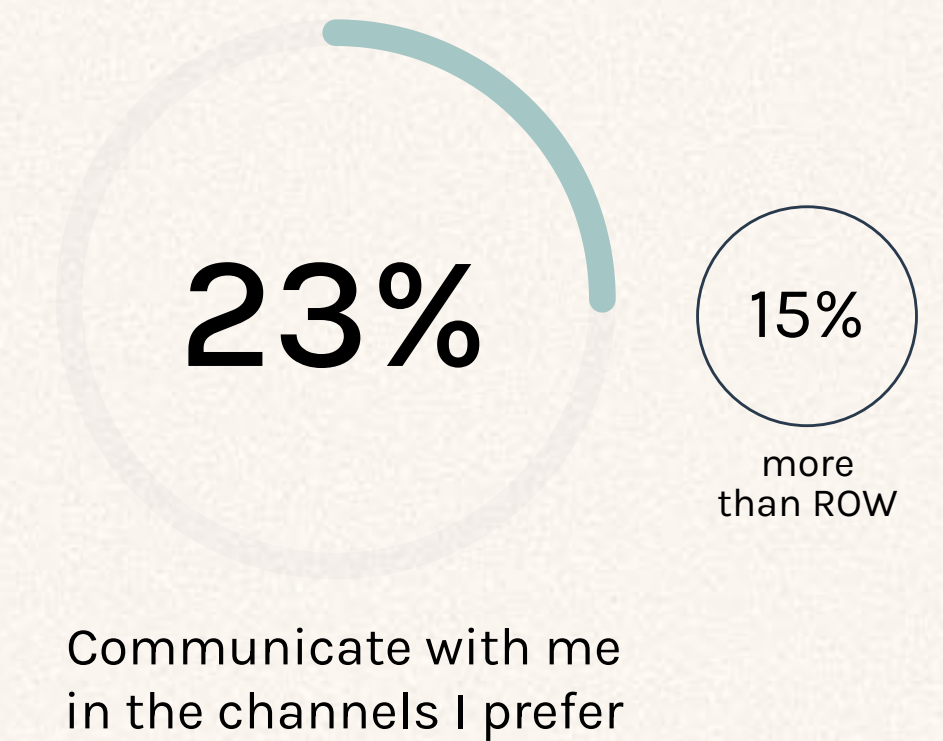
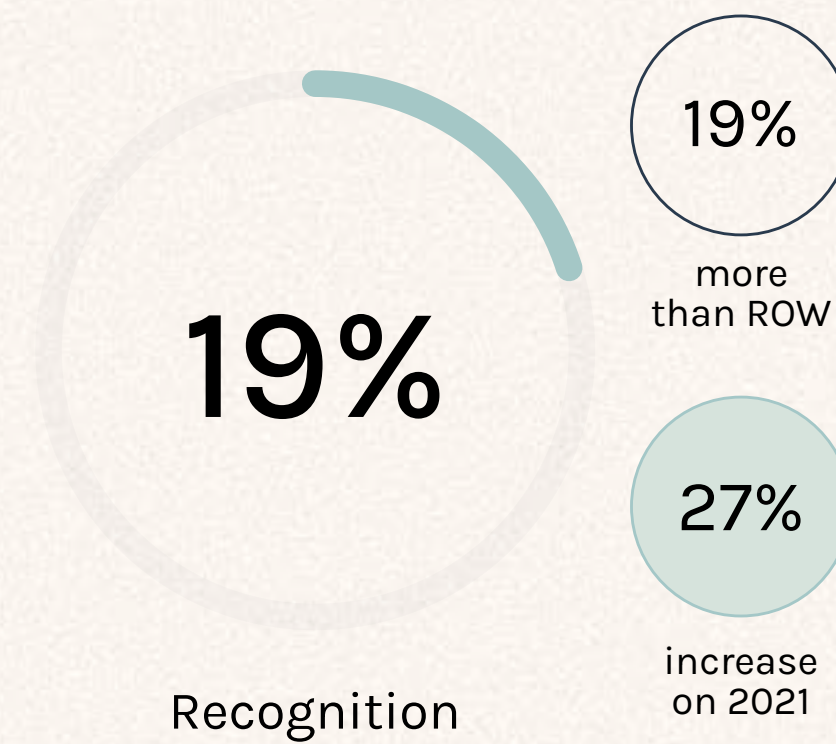
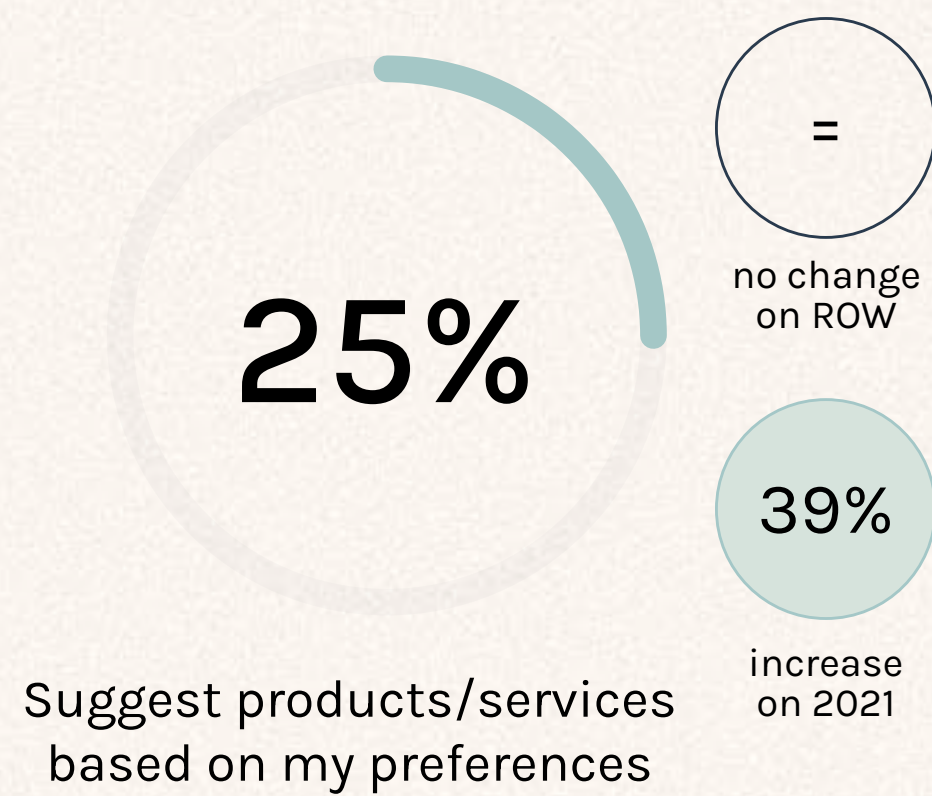
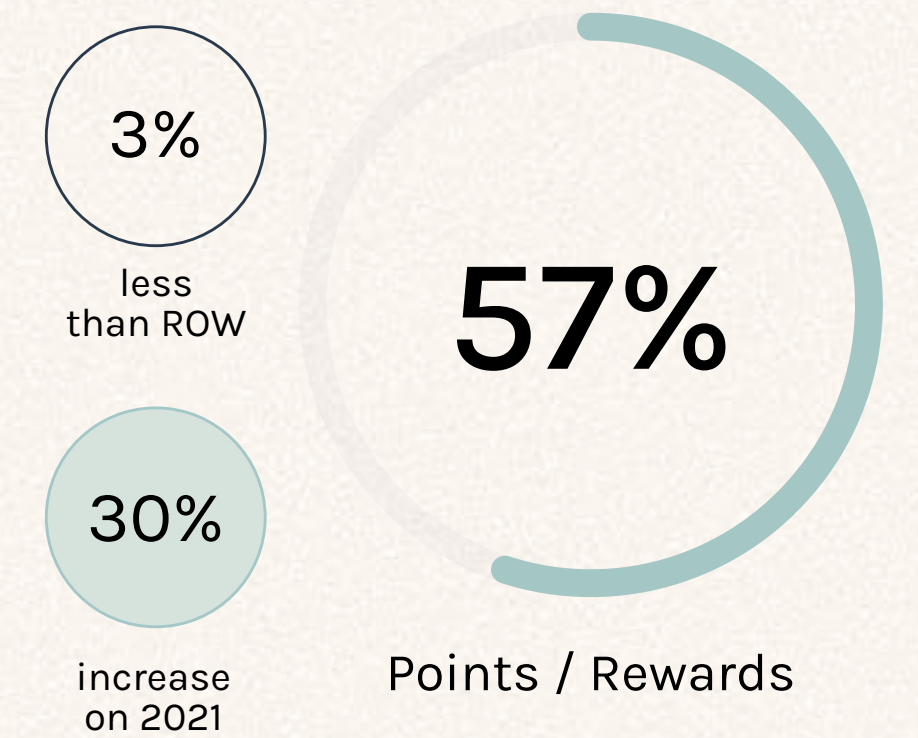
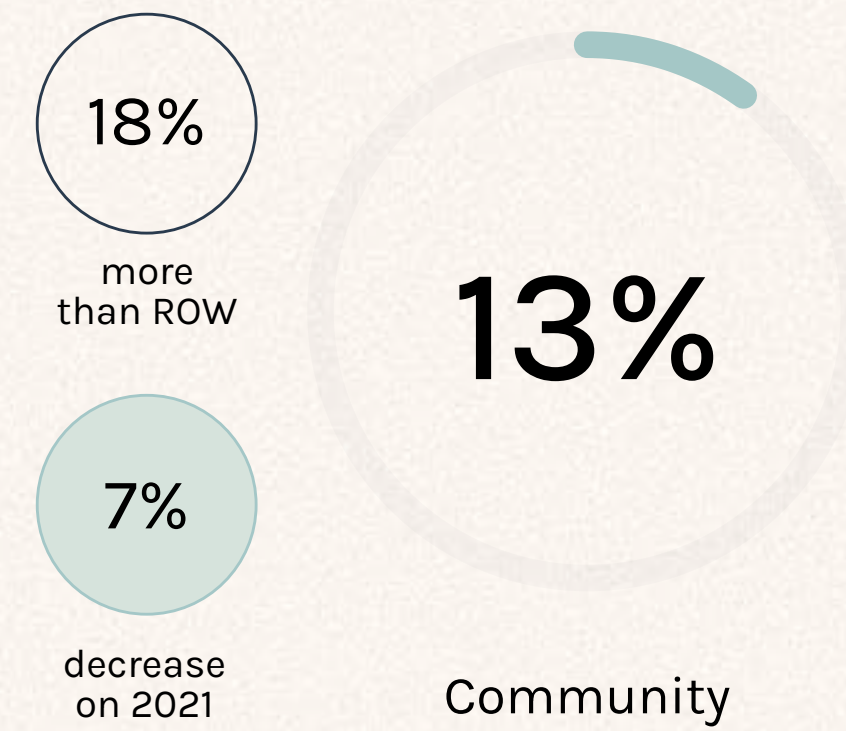
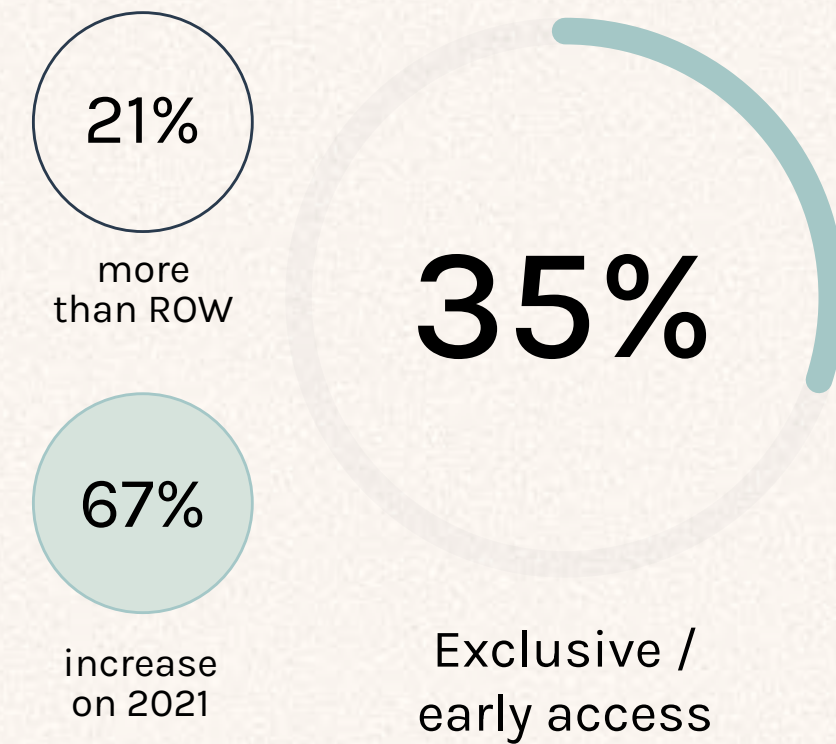
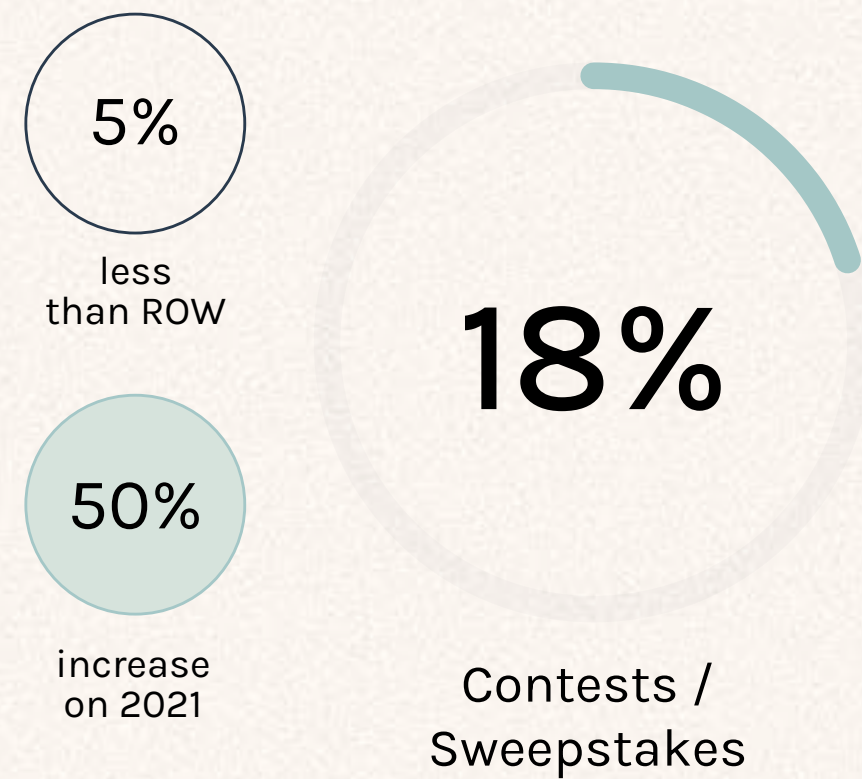
# A Loyalty Program is Not Just a Rewards Program

The modern consumer still values a discount for their loyalty (62%), or points to keep them coming back (57%), but excitingly there's a tangible rise in U.S. consumers valuing all of the things that make your brand unique, and, in turn, makes them feel special.

There have been huge increases in consumers who love engaging interactive experiences like contests and sweepstakes (50%), those seeking early or exclusive access to products (67%), personalized product recommendations based on their self-reported preferences (39%), those that would like brand recognition (29%), and consumers who want to feel part of the brand's community (33%).

The results make it clear that U.S. consumers expect comprehensive loyalty programs that go beyond the generic, that recognizes them as an individual, and delivers content and product recommendations that reflect this.

# Thinking about rewards and loyalty programs, what should brands offer to keep you coming back?





# Creepy Marketing Needs to be Left in the Past

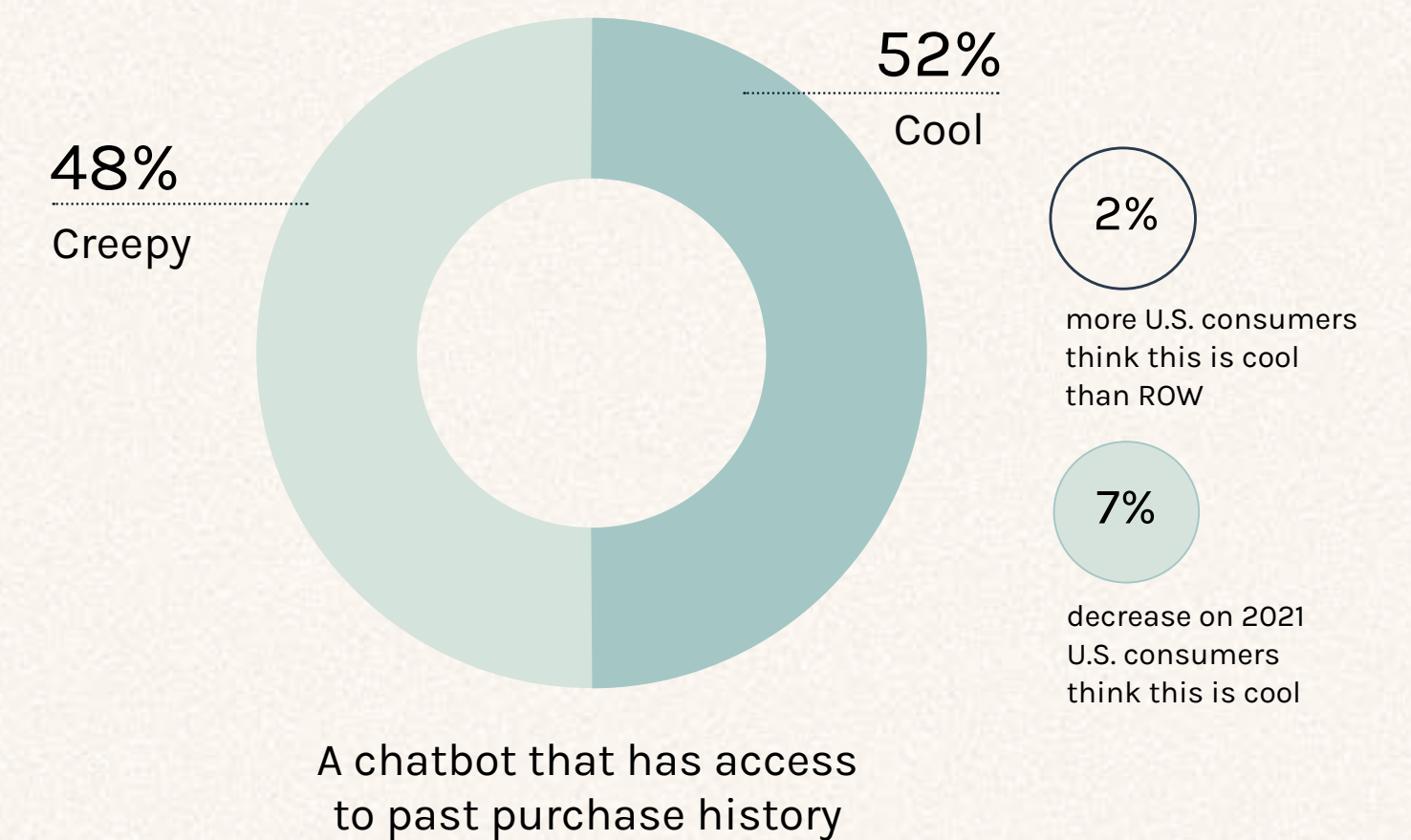
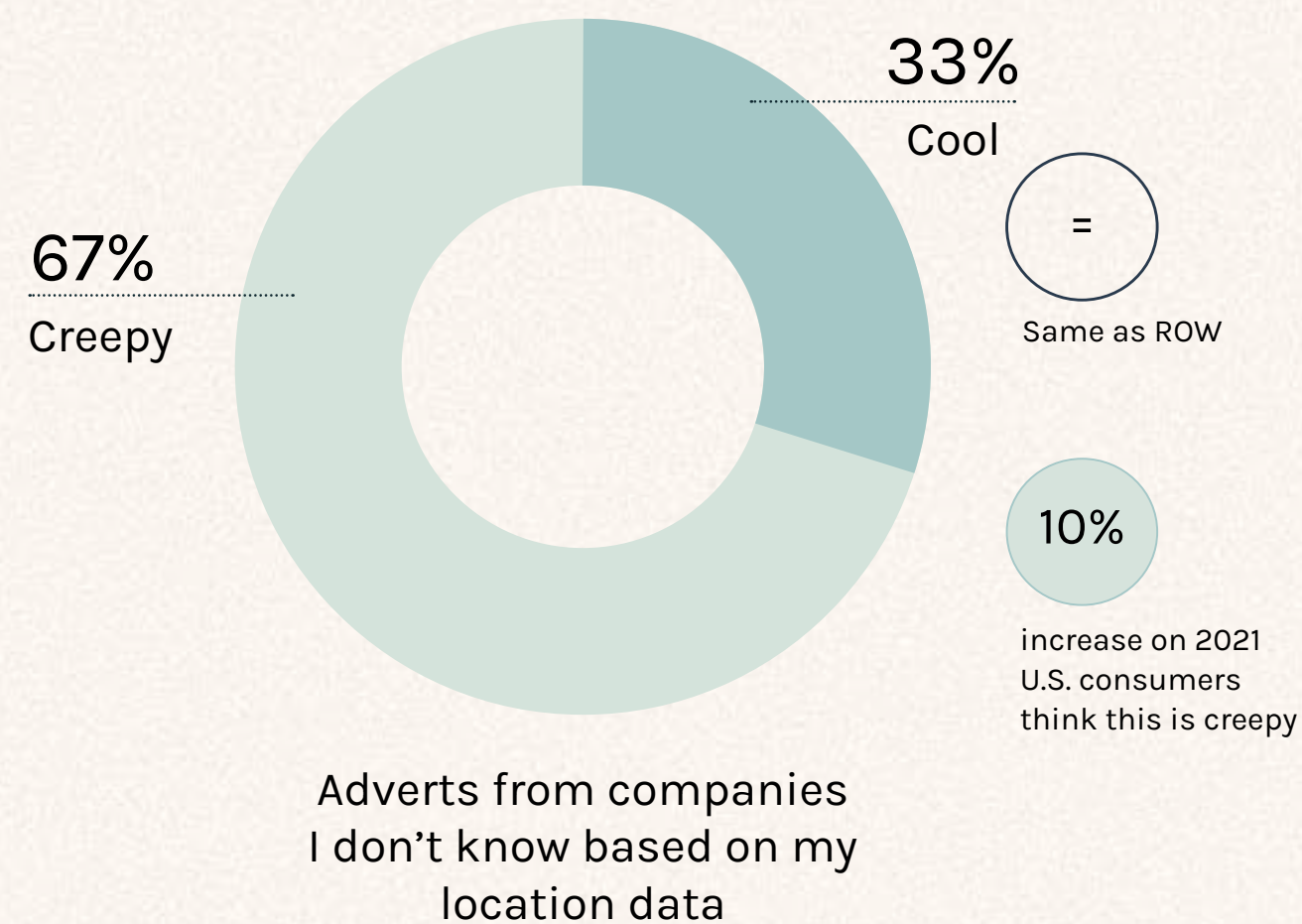
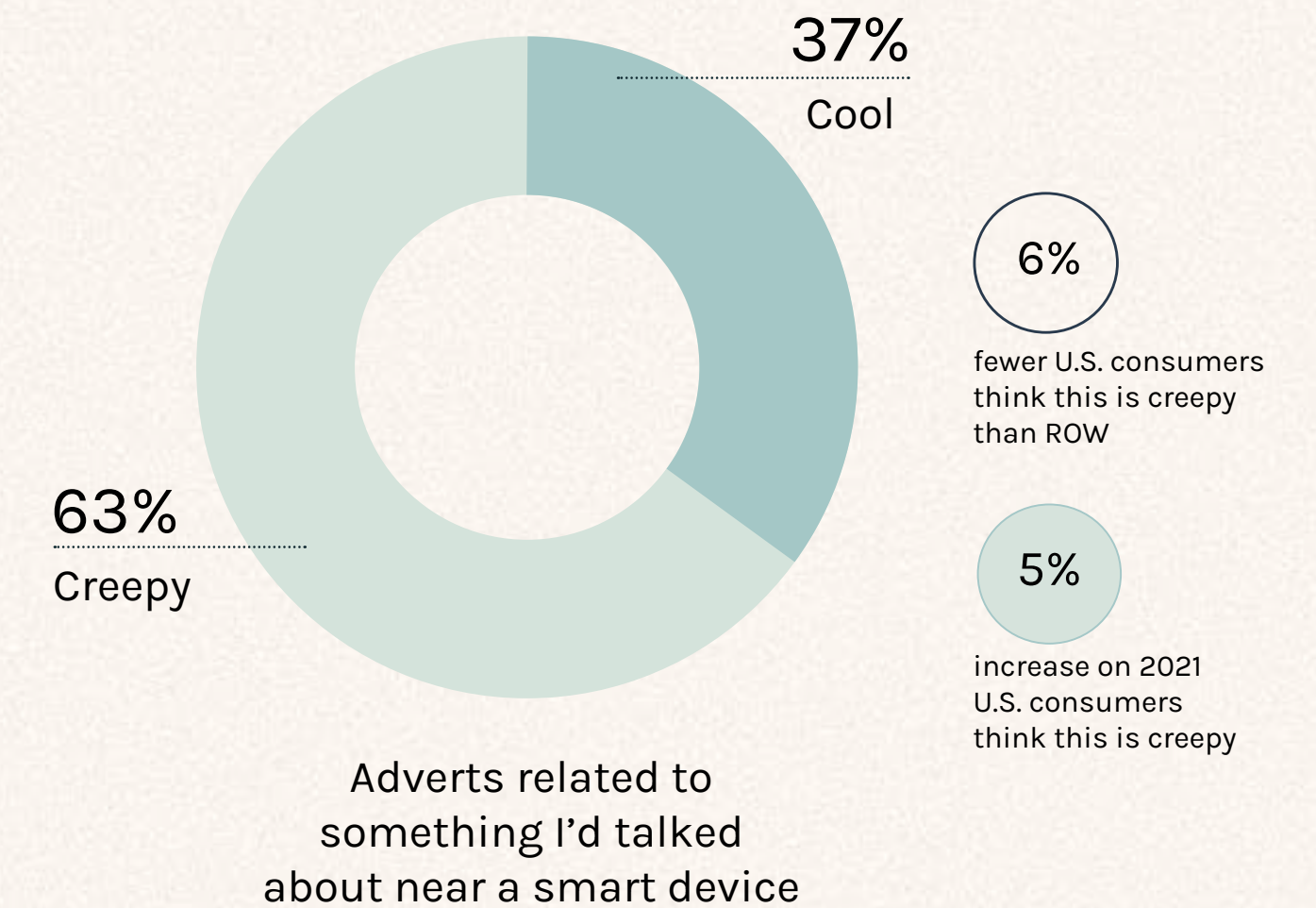
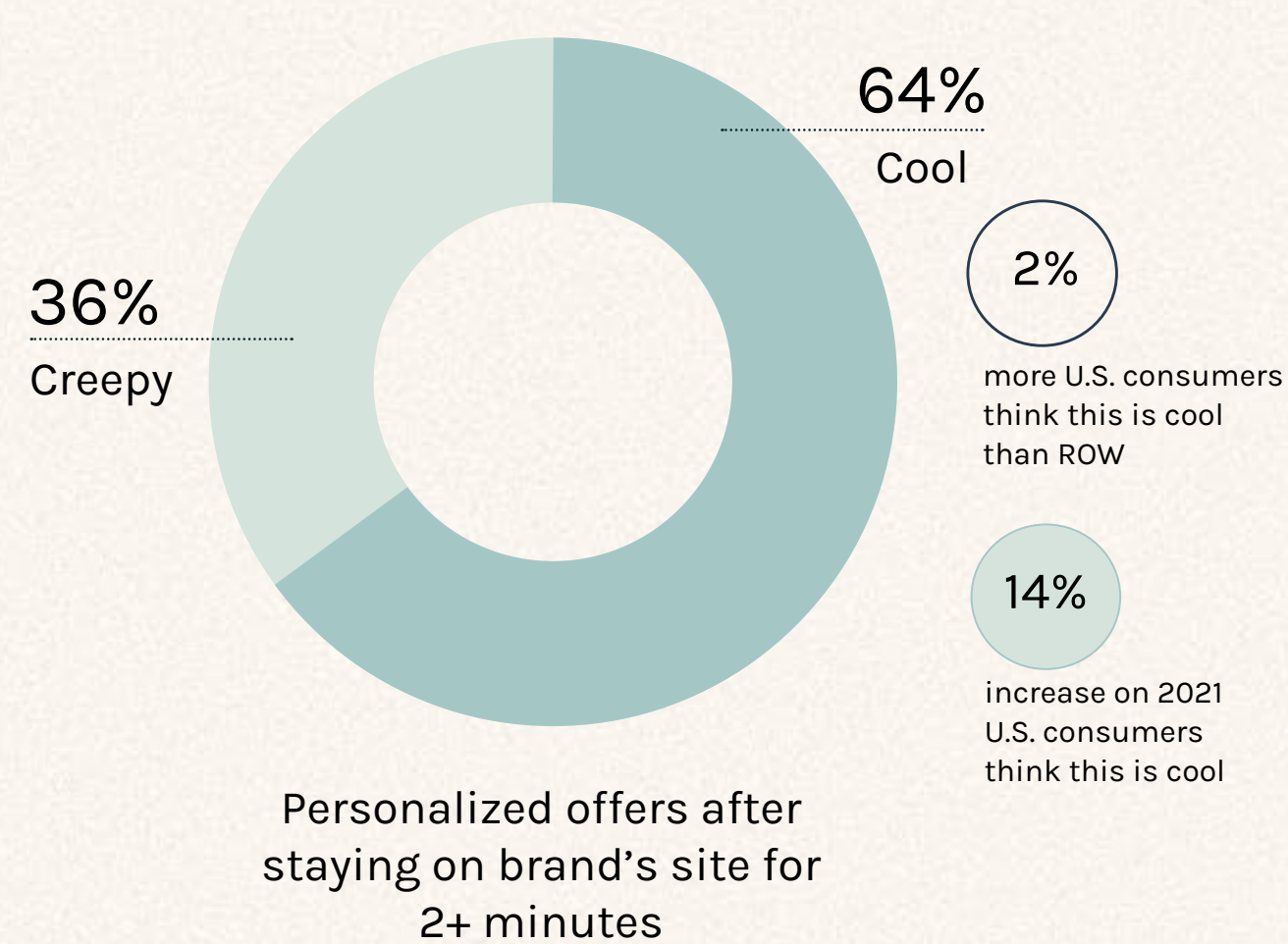
What marketers view as exciting innovations in data gathering to drive personalization initiatives, are actually viewed as rather surreptitious by U.S. consumers. Just because marketers have access to certain data (for now), doesn't mean they should collect it or use it.

The overwhelming majority of consumers feel adverts derived from location data (67%), cookie tracking (56%), and listening smart devices (63%) are creepy, not cool.

But U.S. consumers do like personalization, if it's not done through snooping. 56% think adverts on social media sites based on recent shopping experiences on other sites, personalized offers after staying on a brand's site for 2+ minutes (64%), and recommendations based on past purchases (82%) are cool. These are all an increase on consumers elsewhere in the world.

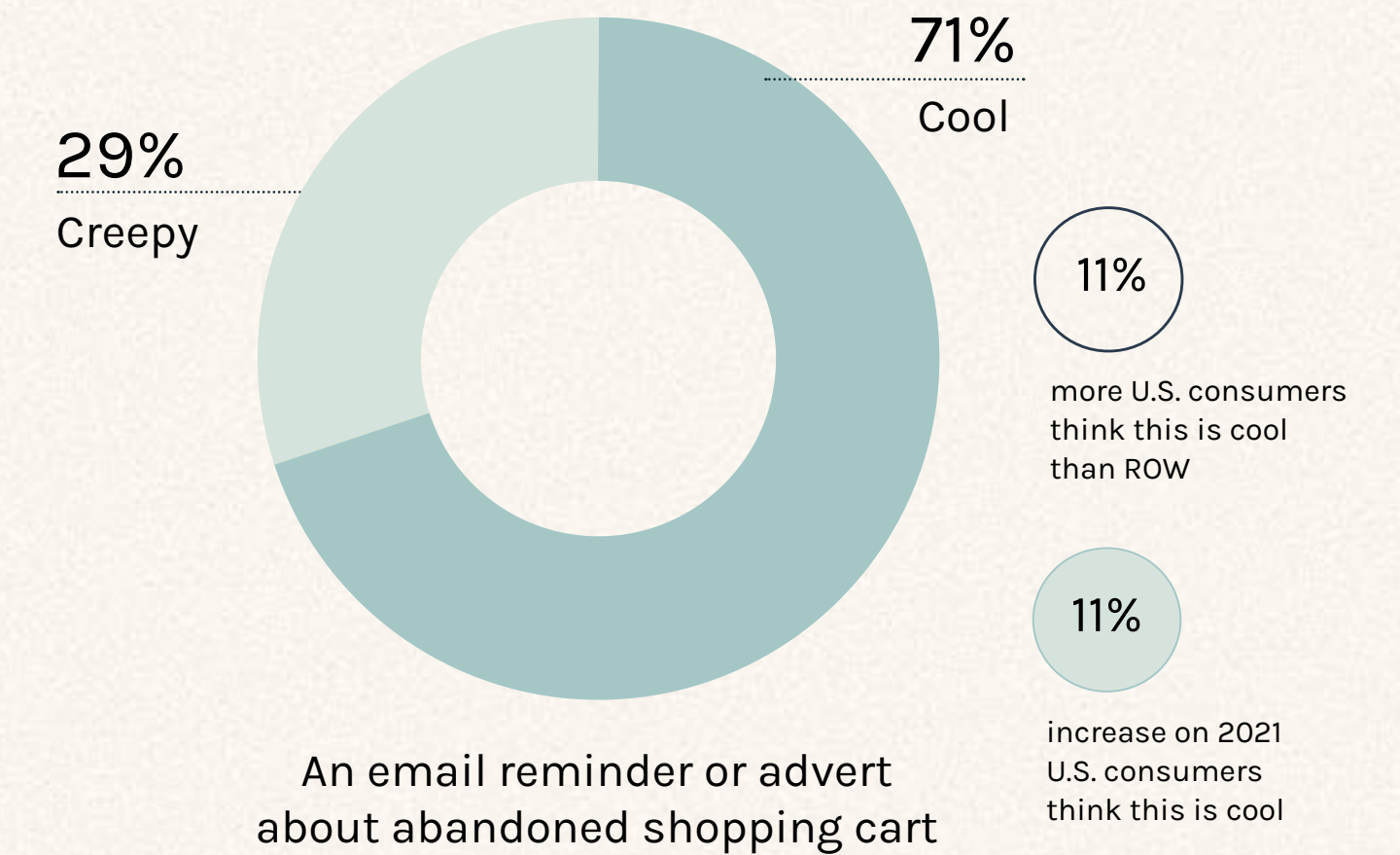
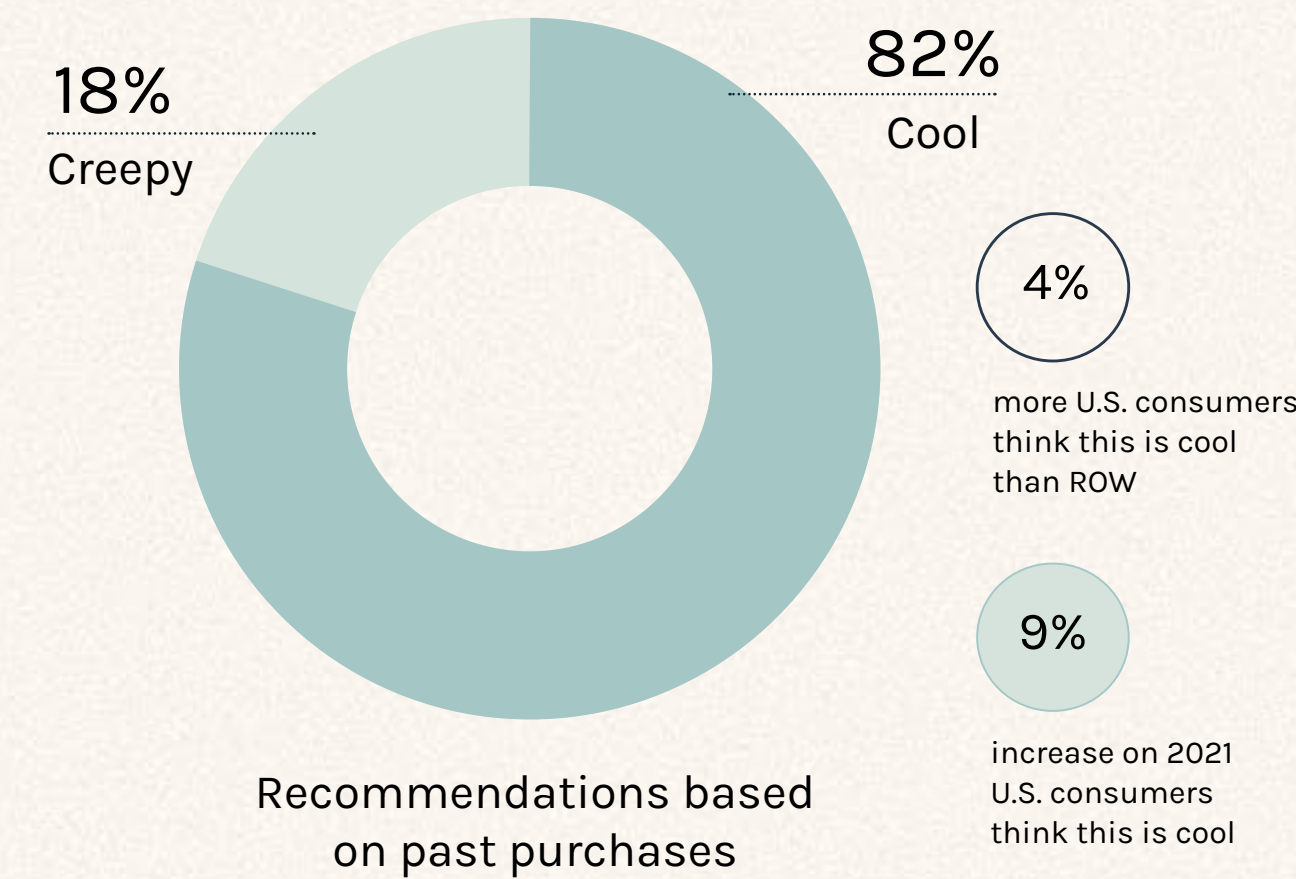
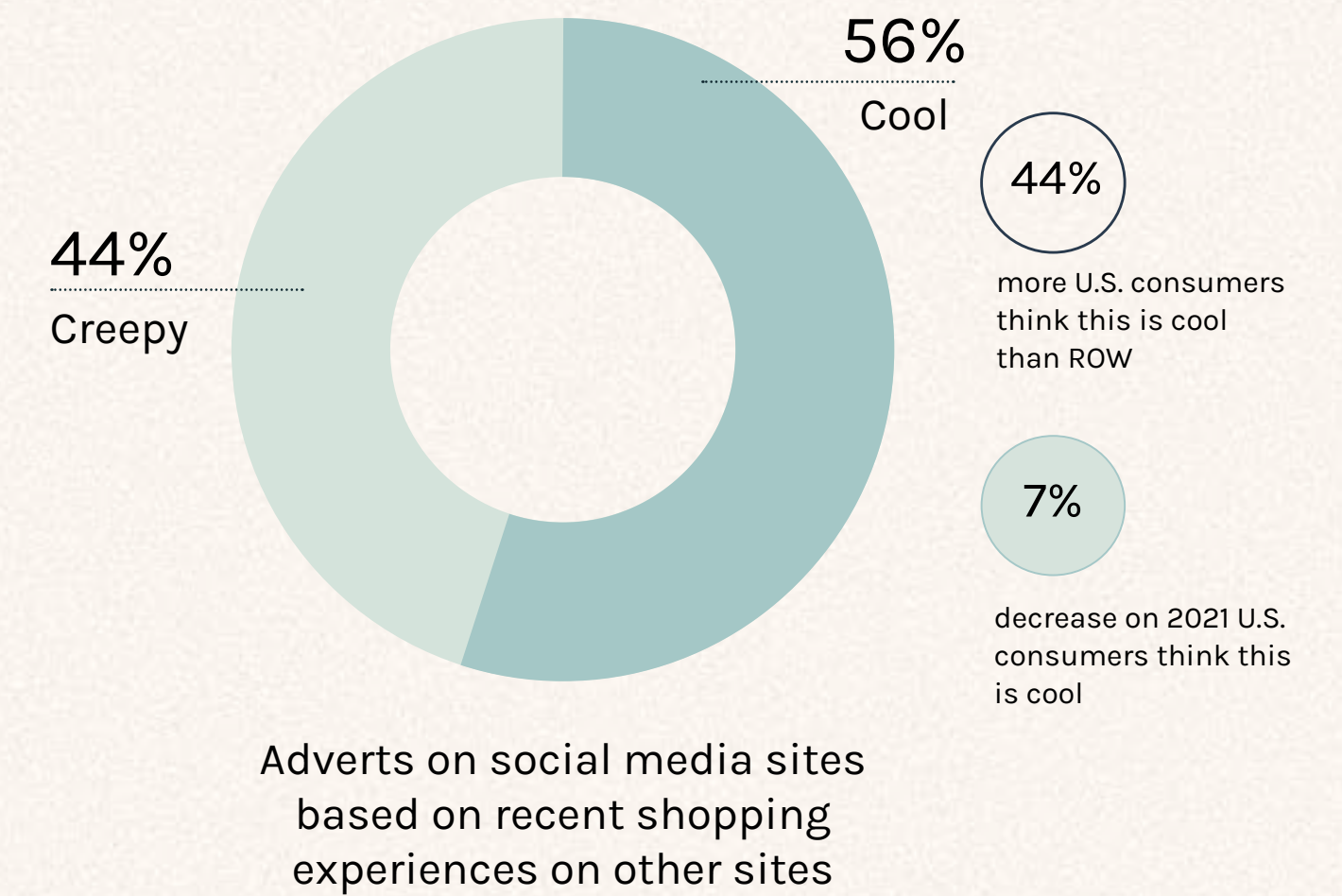
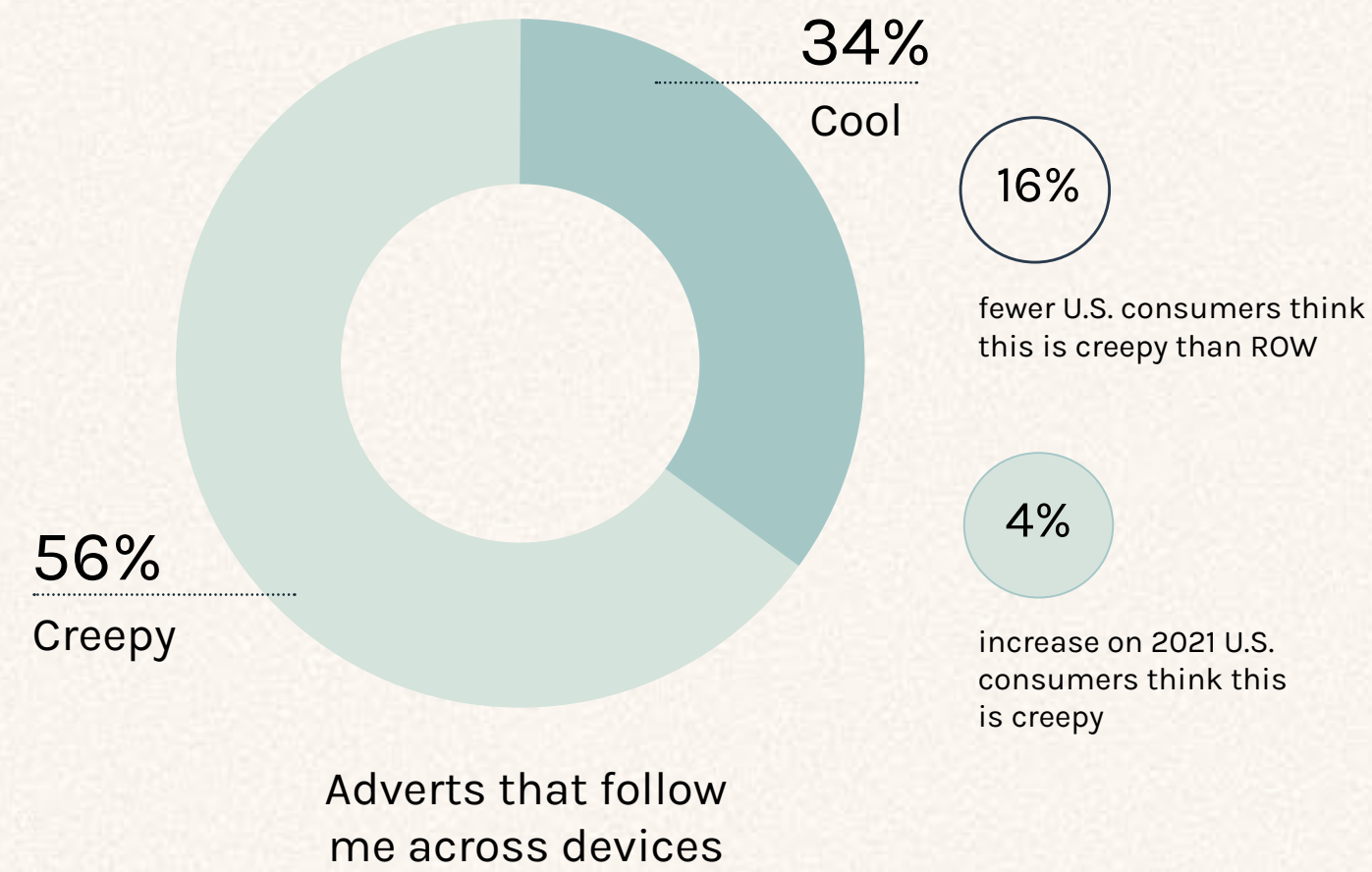


# How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it's creepy or cool?





# How would you feel if a brand/retailer interacted with you in the following ways, please indicate whether you feel it's creepy or cool?



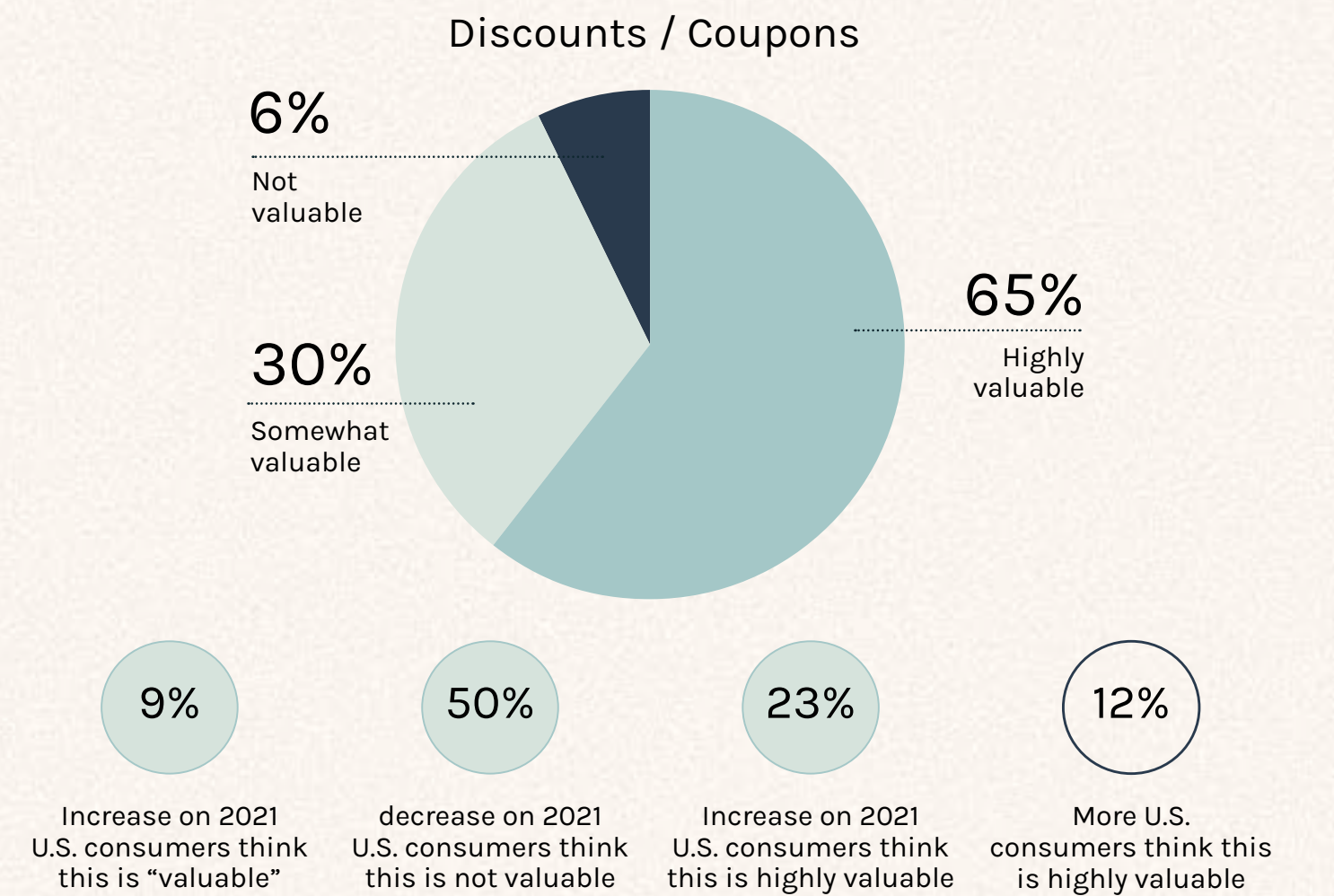
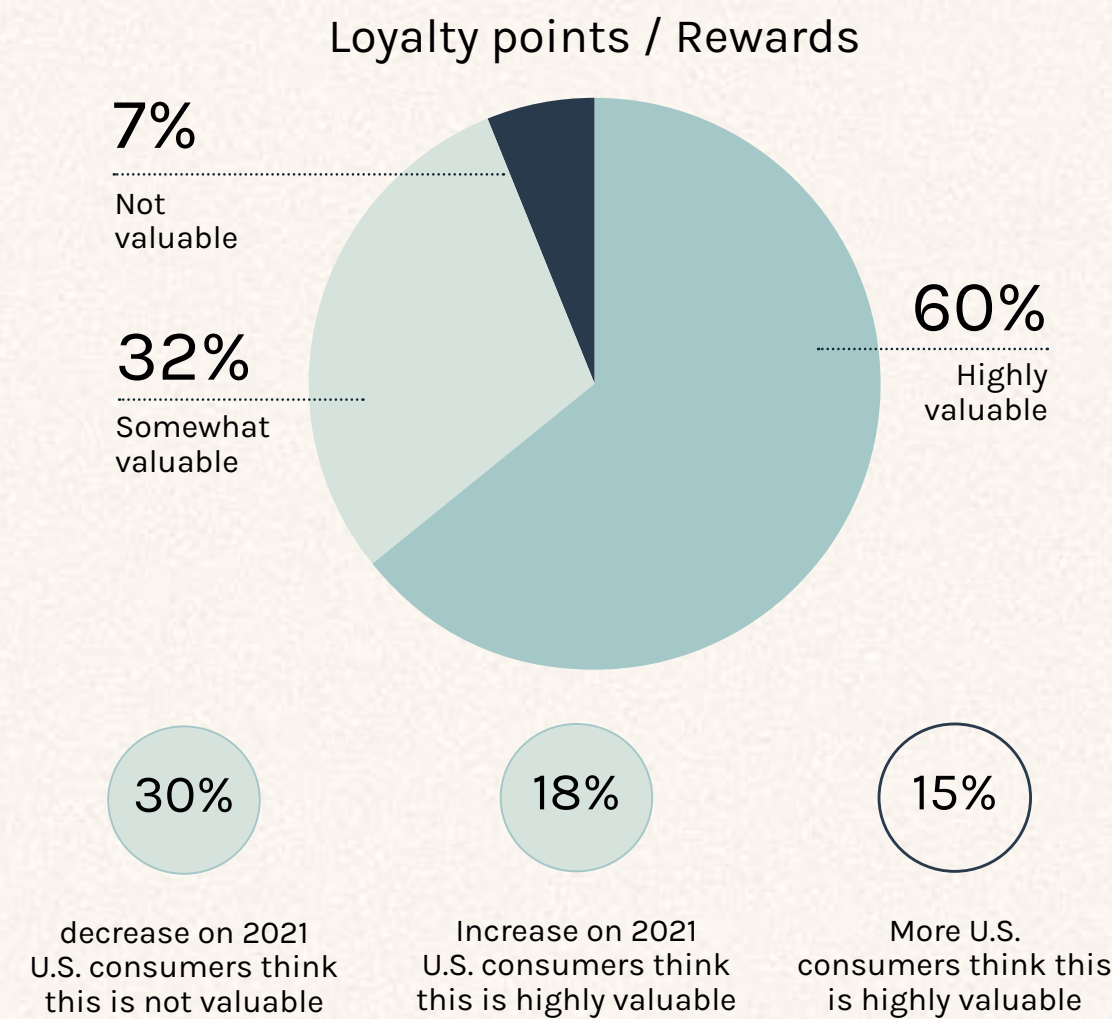
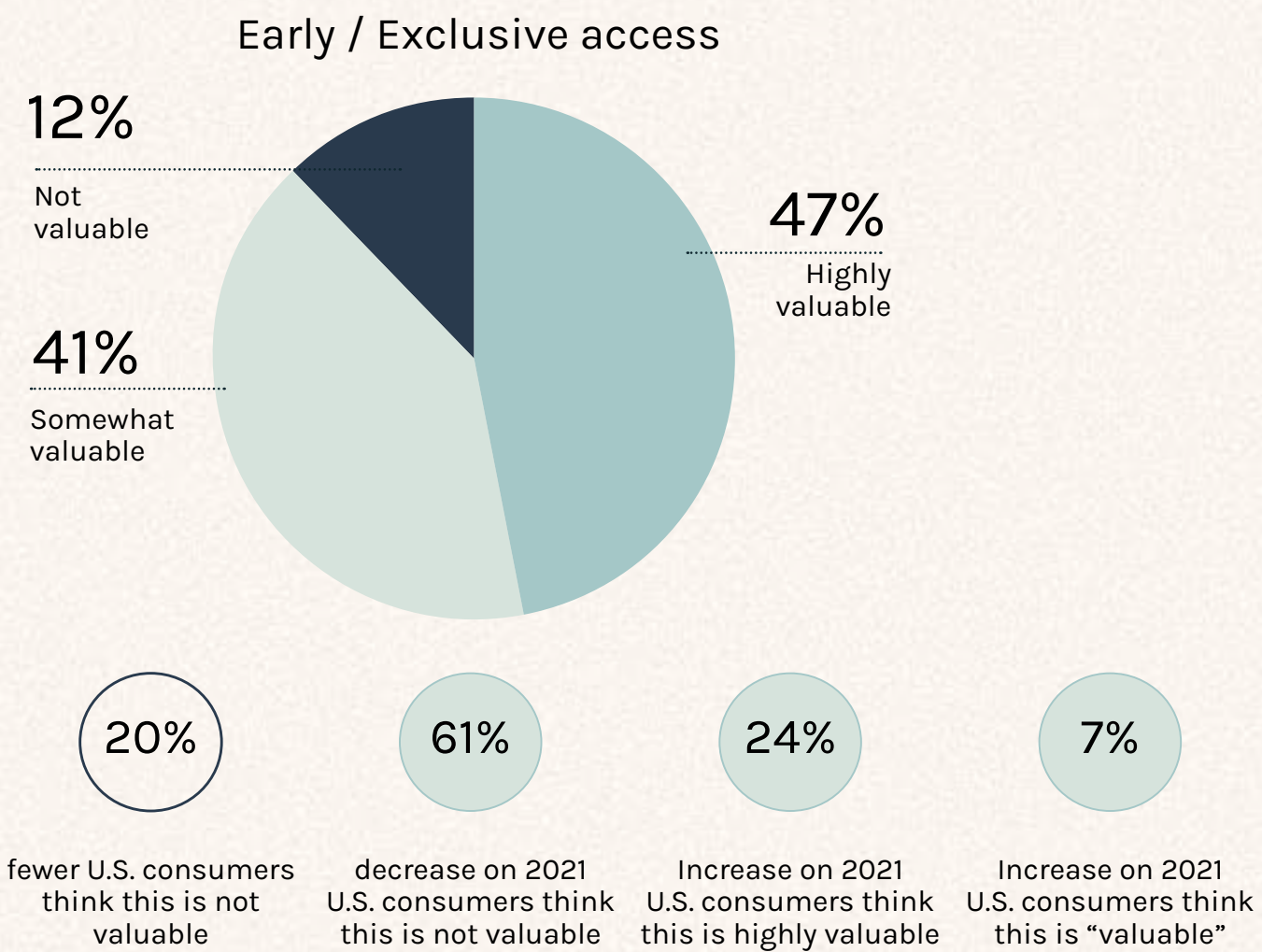
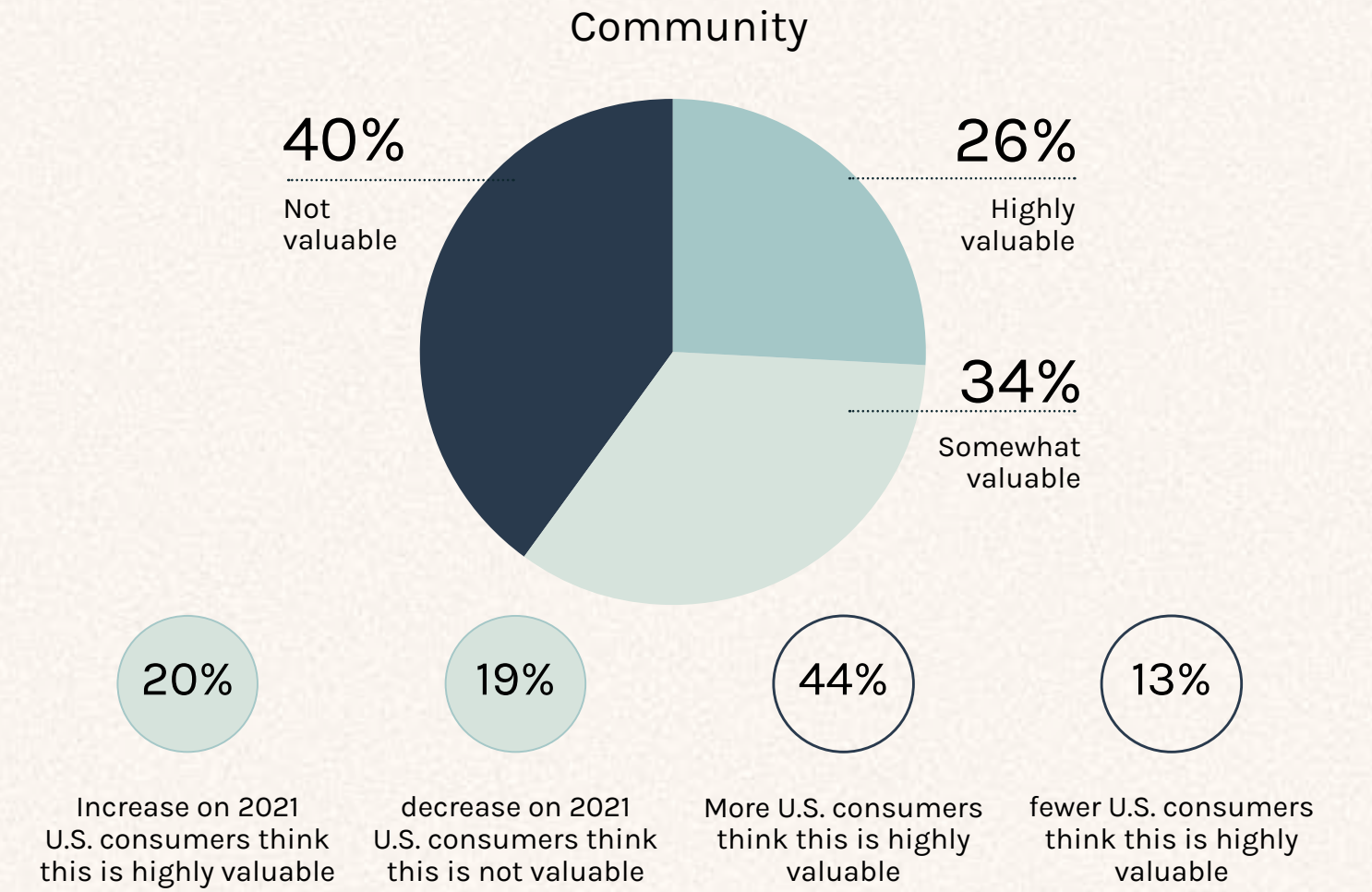
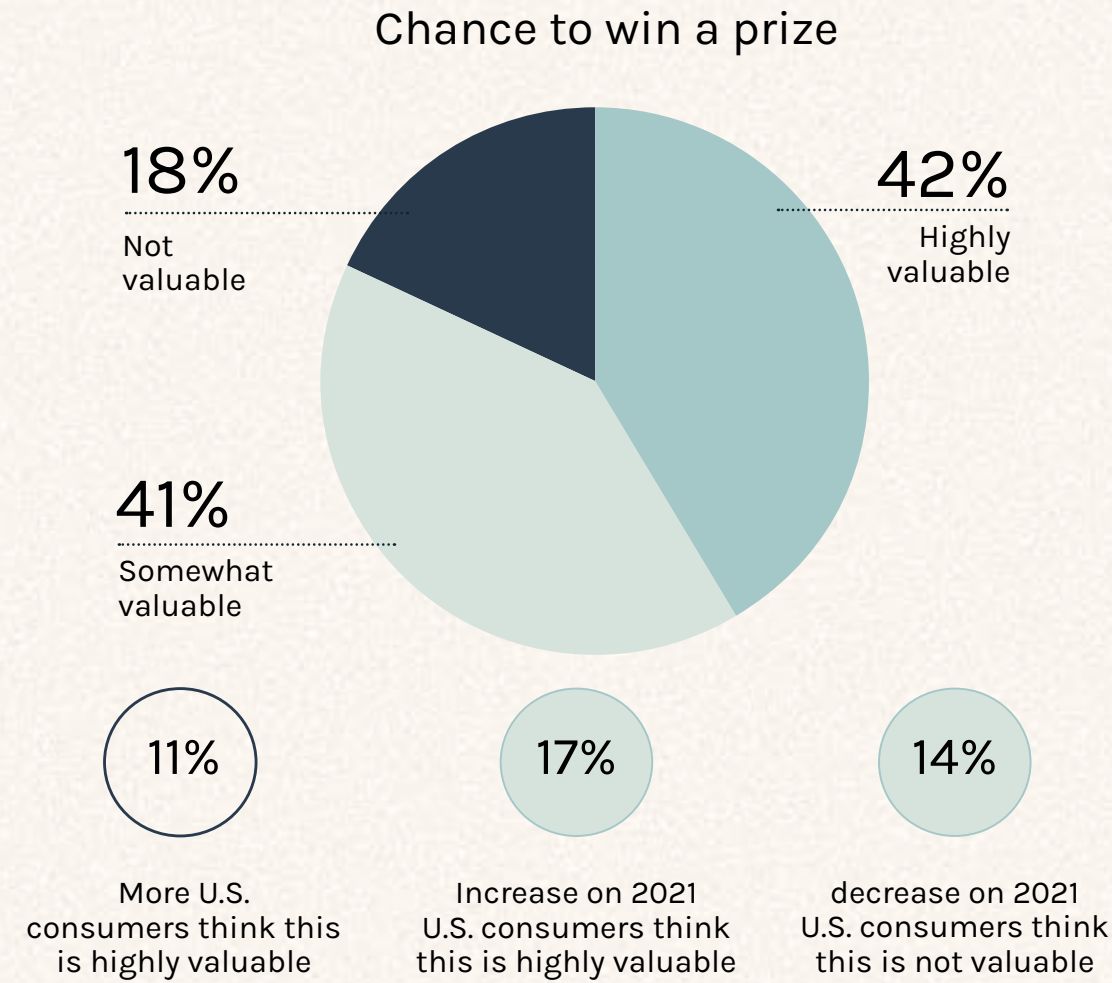
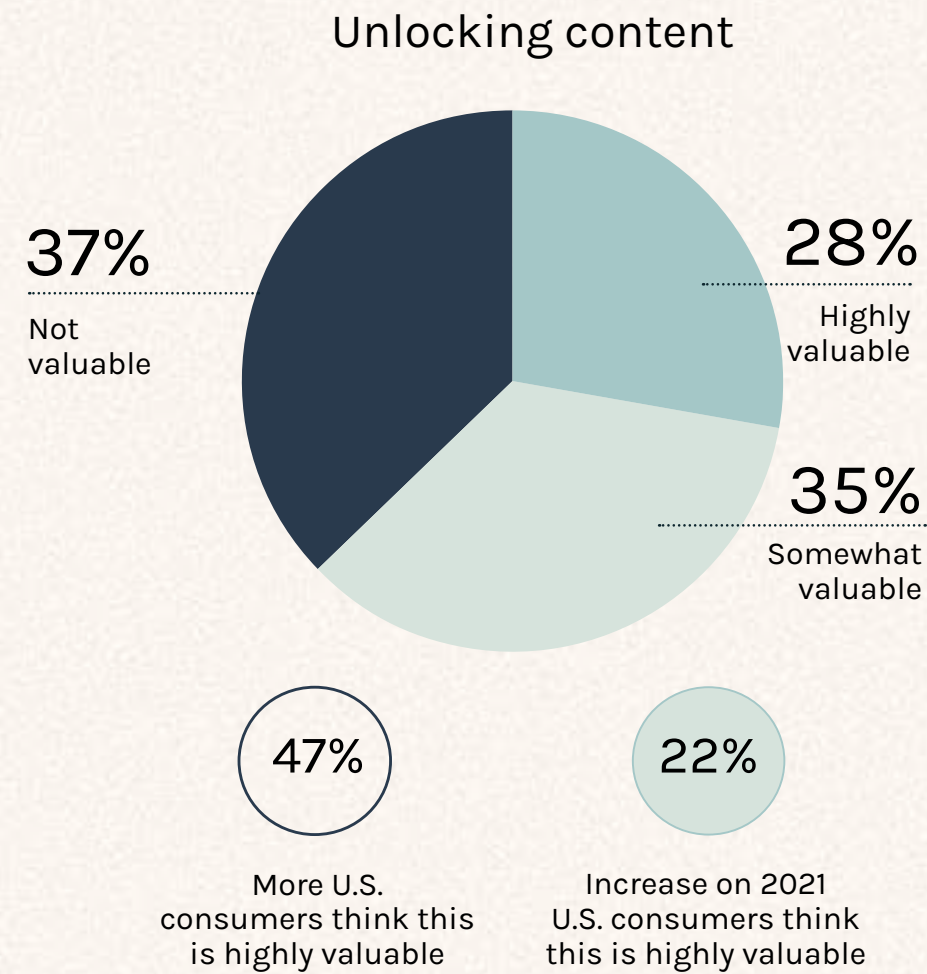


# The Value Exchange Economy

If you want your customers' preference data you need to offer something tangible in return — this is the value exchange economy. U.S. consumers expect to be entertained, engaged, and receive something in return for their attention and personal data.

But it needn't always be a red-letter prize or huge discount. Sure, 95% of U.S. consumers are prepared to trade data for a discount, 92% for loyalty points (18% increase on 2021), and 83% for the chance to win a prize. But 88% of U.S. consumers are actually sharing behavioral and psychographic data for exclusive access (24% increase on 2021), 63% will trade data to unlock content (22% increase on 2021), and 60% will give up data to feel part of a brand's community (20% increase on 2021 and 44% higher than consumers elsewhere).

# Brands often provide something of value in exchange for personal data. Which types of benefits are the most valuable to you?



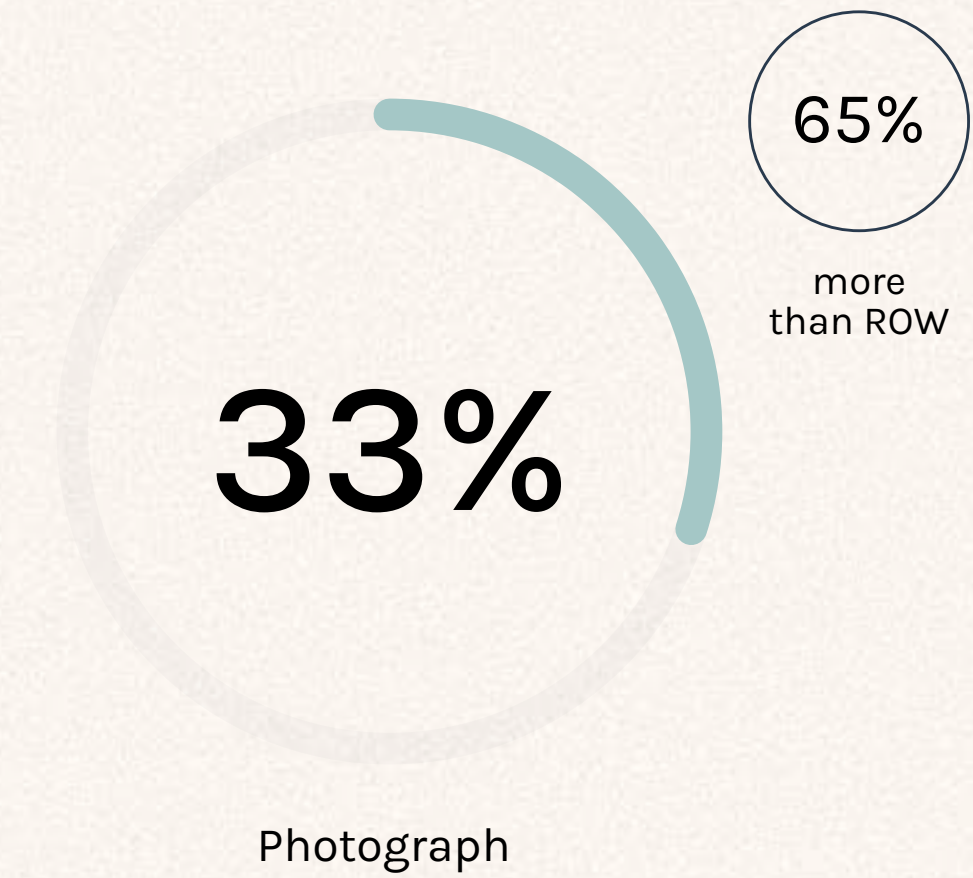
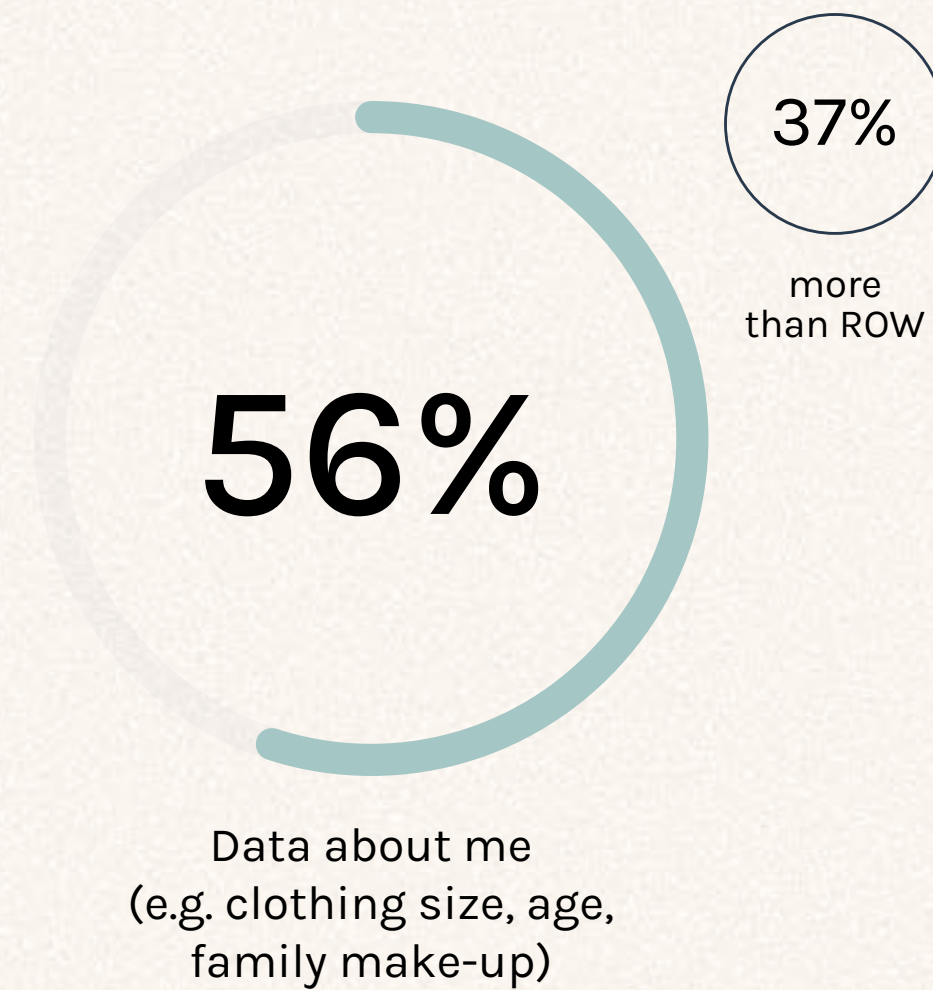
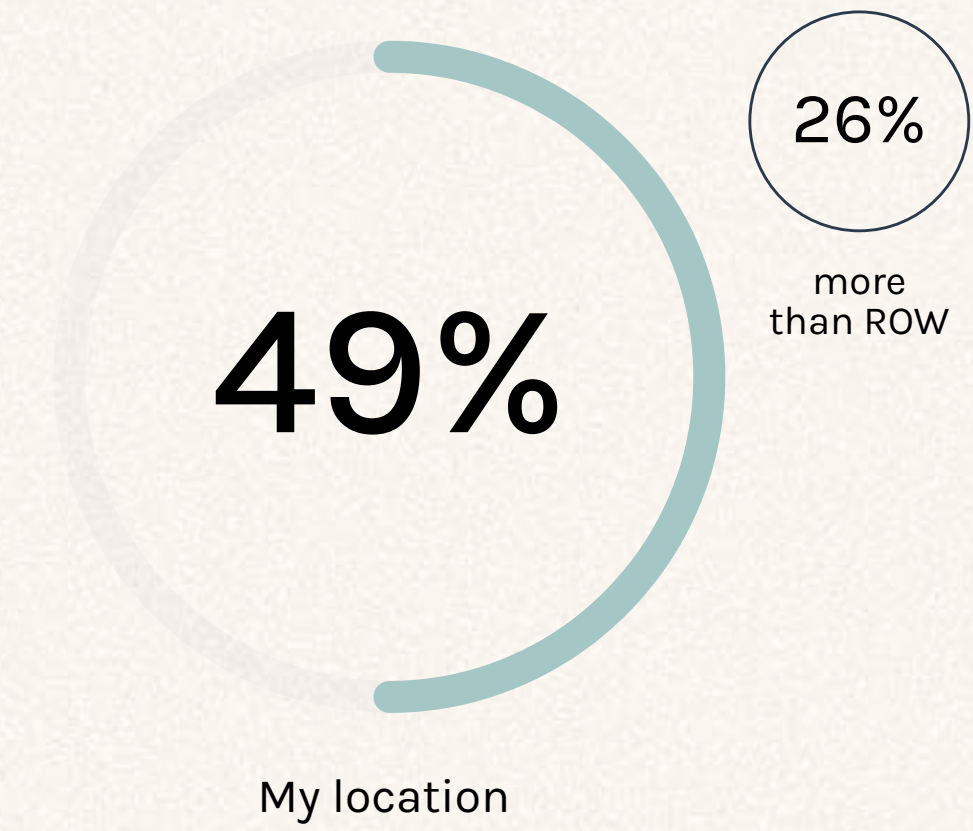
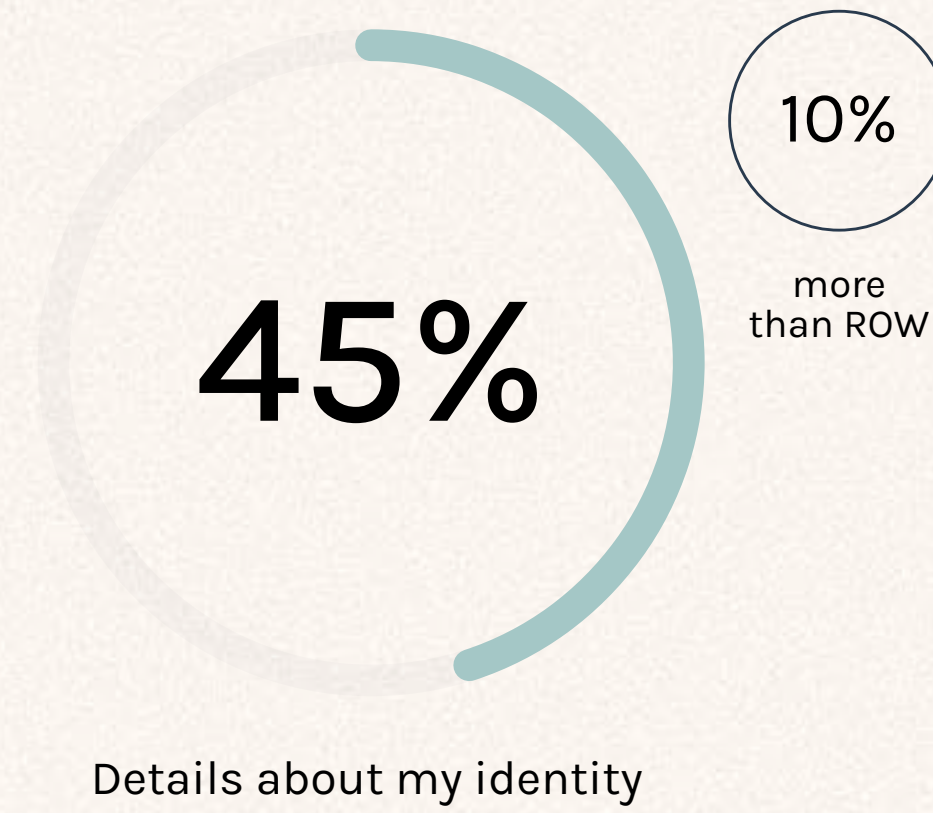


# U.S. Consumers Will Share Their Preference Data for a Better Service

The majority of consumers are comfortable sharing data about themselves like clothing size, age and family make-up for a better service (56%), but most are not happy to share a photograph (67%), their location (51%), or identity details (55%). The key is only asking for information that truly empowers you to build more meaningful relationships with your customer and deliver on the promise of a more-personalized service.



# Are you comfortable sharing the following personal data with brands in exchange for better service or value?





# U.S. Consumers are More Privacy Conscious Than Ever, and They're Getting Proactive About it

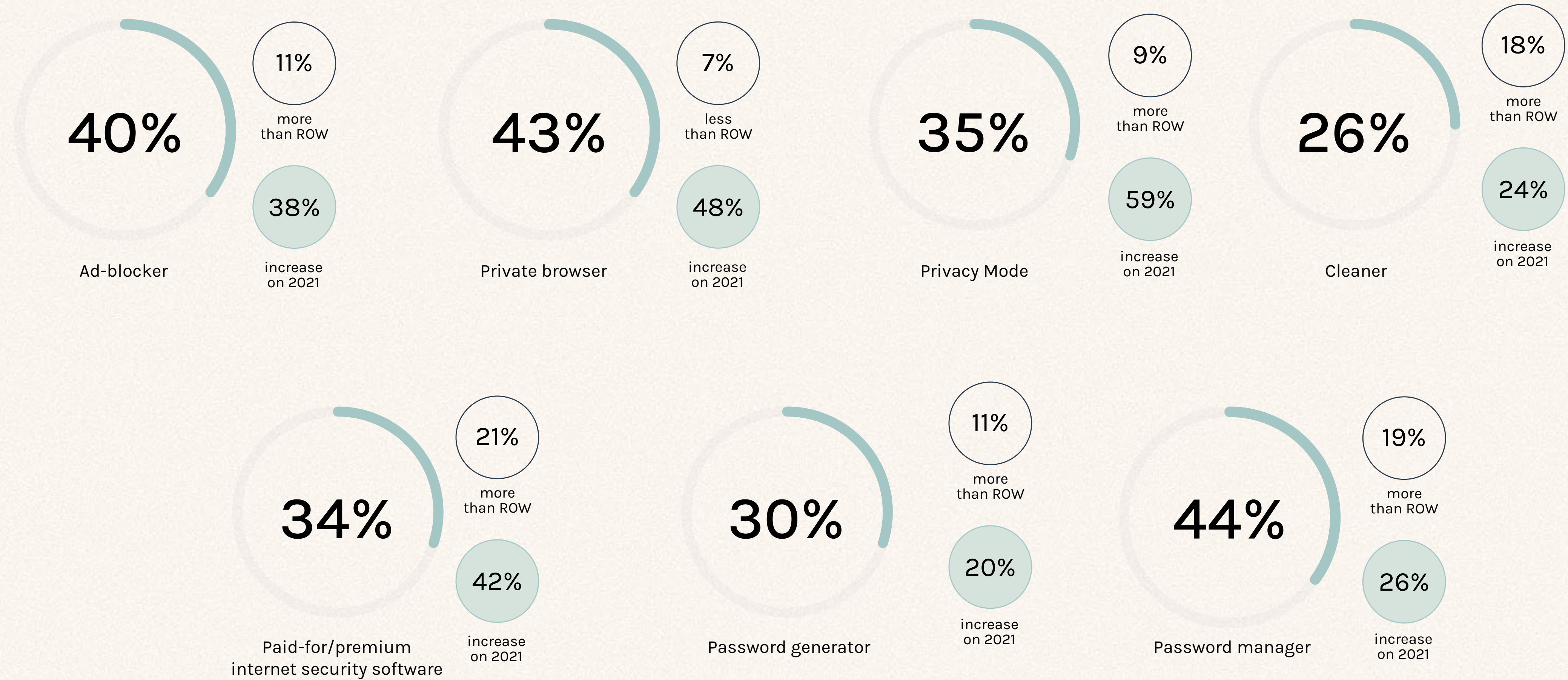
We may be a good few years on from the Cambridge Analytica scandal and introduction of the CCPA, but U.S. consumers are ever-cognizant of the value of their data, and are taking proactive steps to protect it.

A hefty 40% of U.S. consumers have gone to the trouble of installing ad blocking tech, 11% higher than the rest-of-the-world and a sharp 38% increase on 2021. Almost half (44%) have a password manager and over a third have paid for premium internet security software - a 42% increase on the previous year,

The solution is to not find ways to circumvent this trend but commit to forging honest, meaningful relationships, and adopting a fully-fledged privacy-first strategy.



# Do you personally use the following on either your mobile, tablet or desktop PC?



# The Death of the Cookie

As Google cements plans to comprehensively curtail third-party cookie tracking within the next couple of years, and Firefox, Safari et al., follow suit, the way in which marketers connect with consumers is undergoing radical change.

Although this is a win for privacy-conscious consumers only 29% are glad they're being withdrawn, and the vast majority of U.S. consumers are blissfully unaware cookies are being phased-out (64%) in the first place - this is however much higher than consumers in other parts of the world.

These sweeping changes to the martech and adtech industries reinforce the need for marketers to shift to a first- and zero-party data strategy to power their advertising and marketing initiatives.

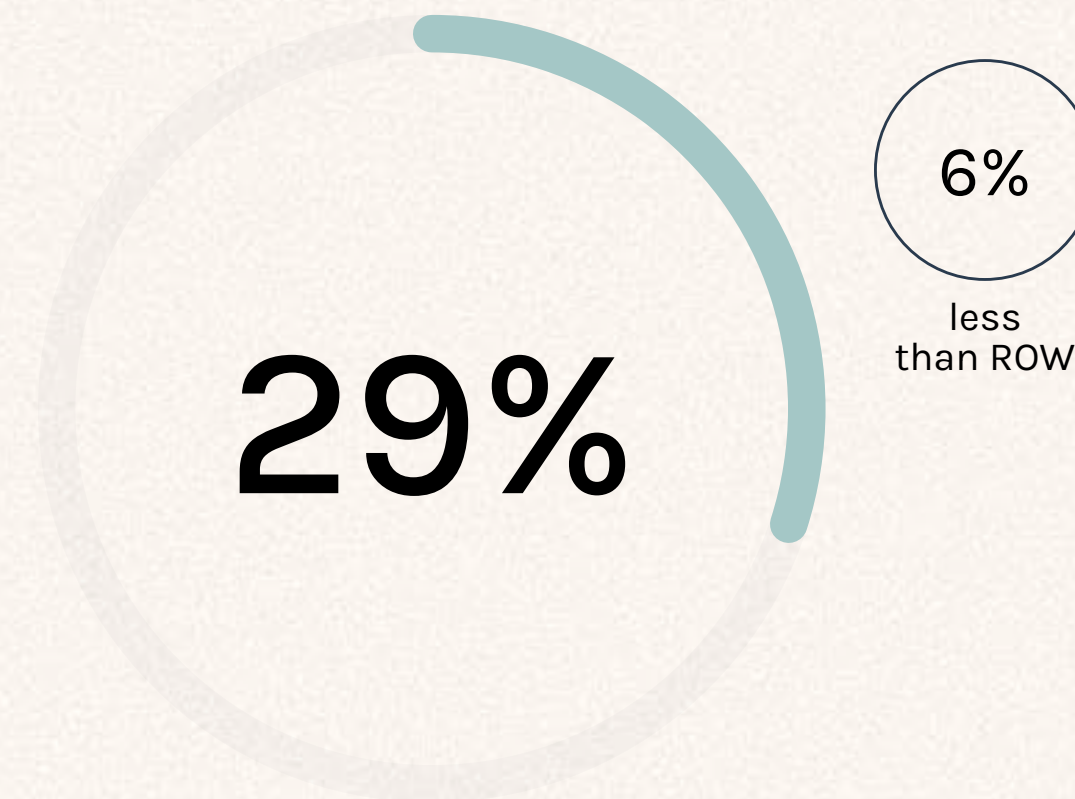
Were you aware that cookies, which track visitor activity on websites, are being withdrawn soon?

**36%**  
Yes

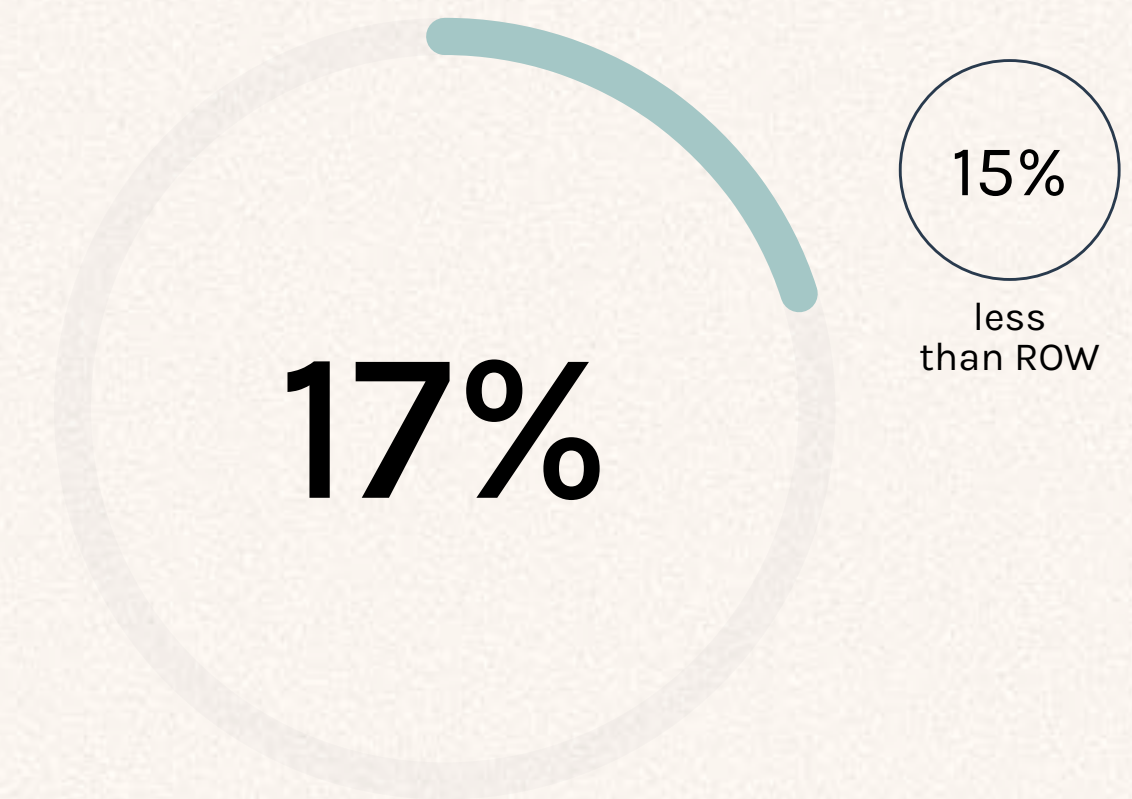
**38%**  
higher than  
ROW



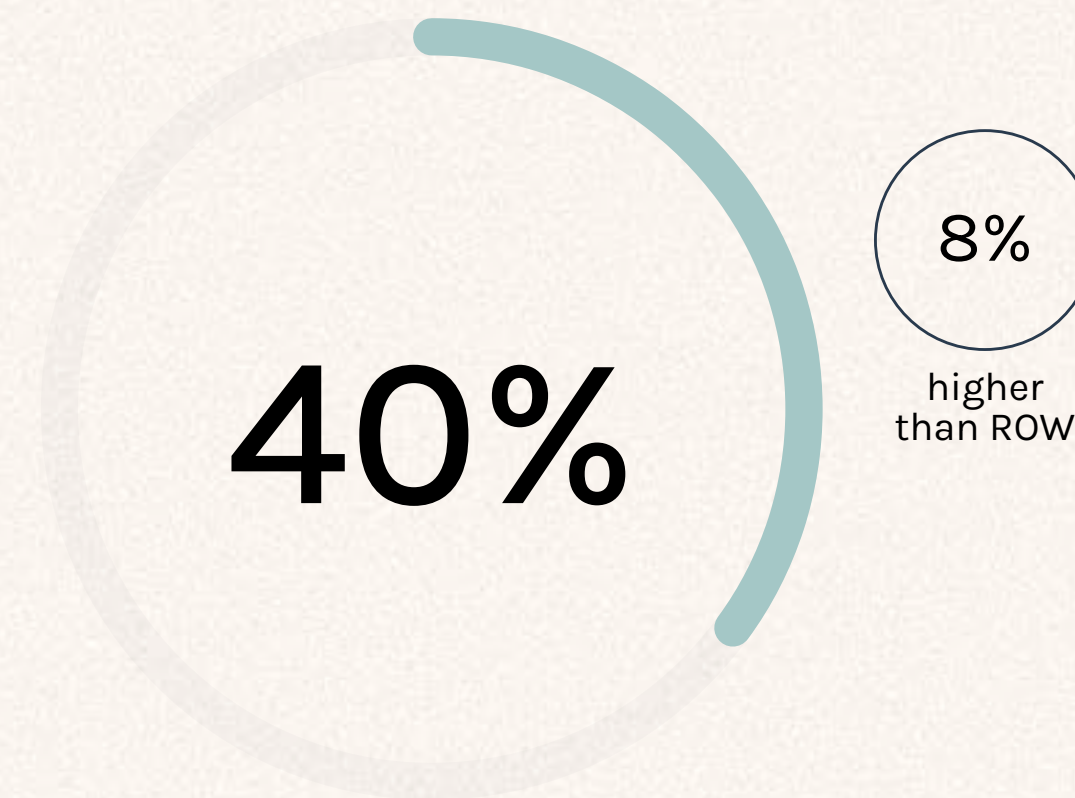
# On balance, how do you feel about this?



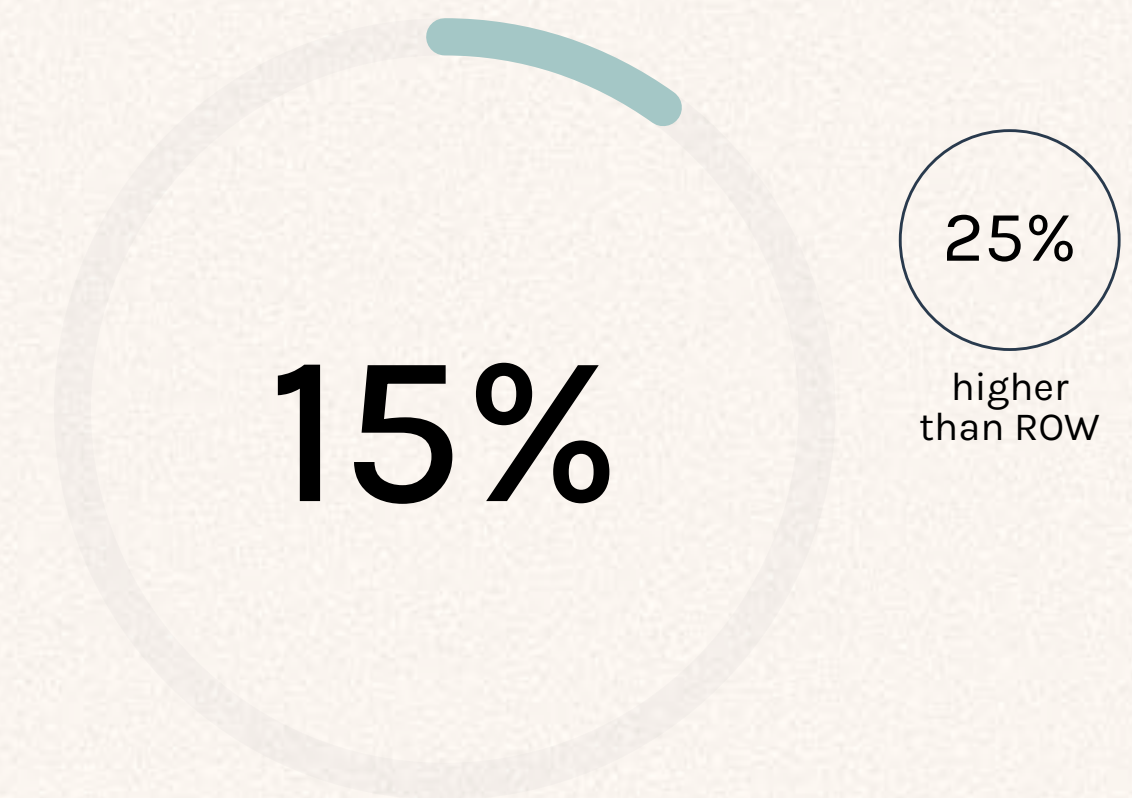
I'm glad - I don't like being tracked



Cynical - brands will just find a new way to track me



Optimistic - perhaps brands will come up with a way of sharing data that is fairer for everyone



I'll miss them - they make for a better experience



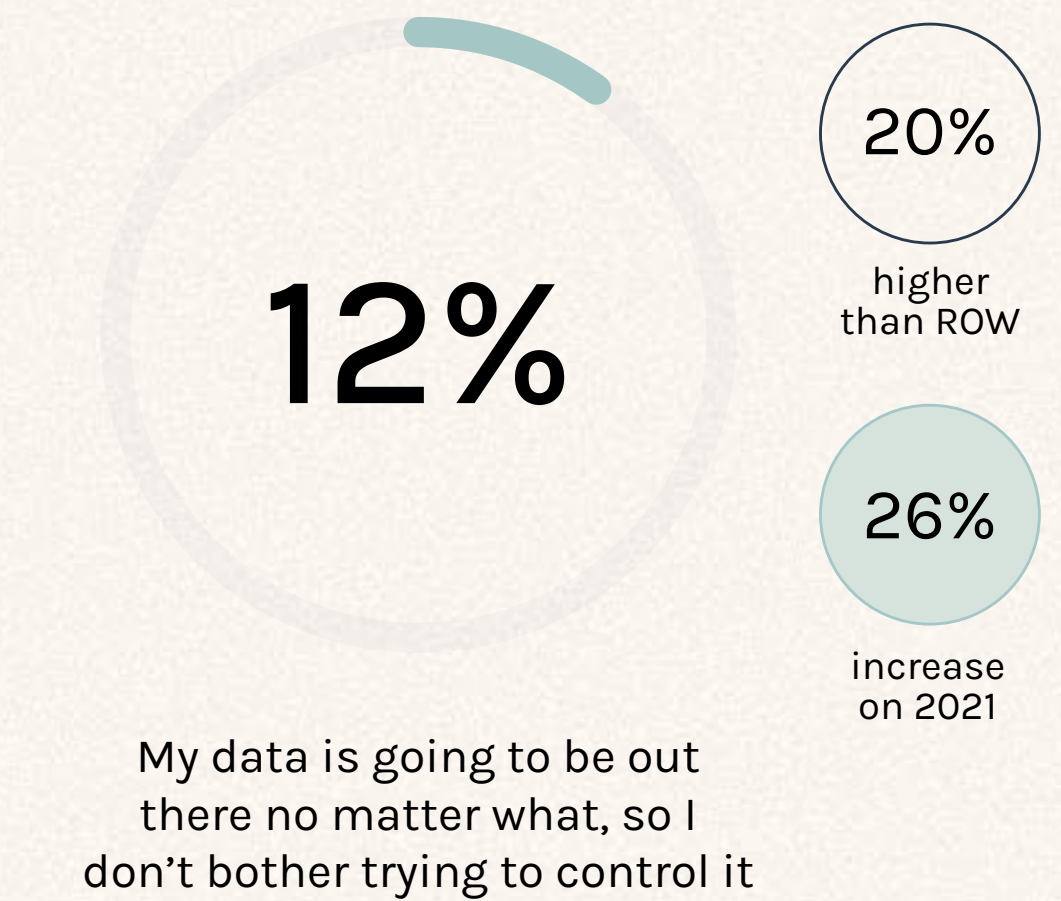
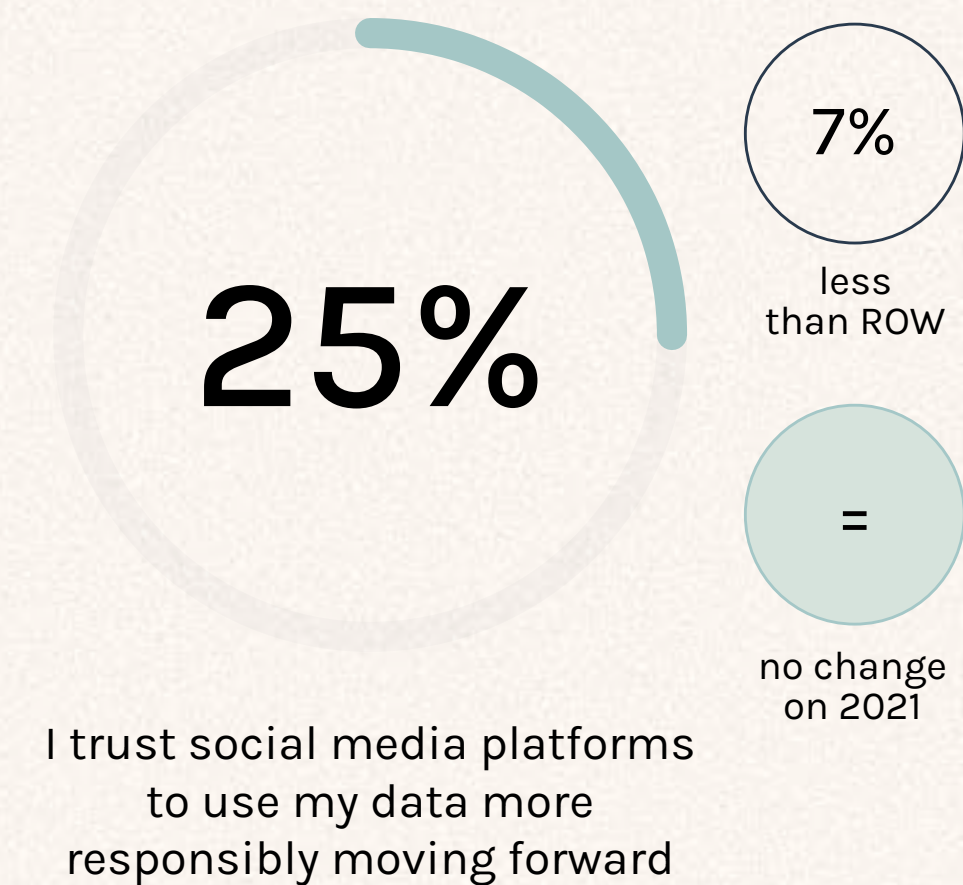
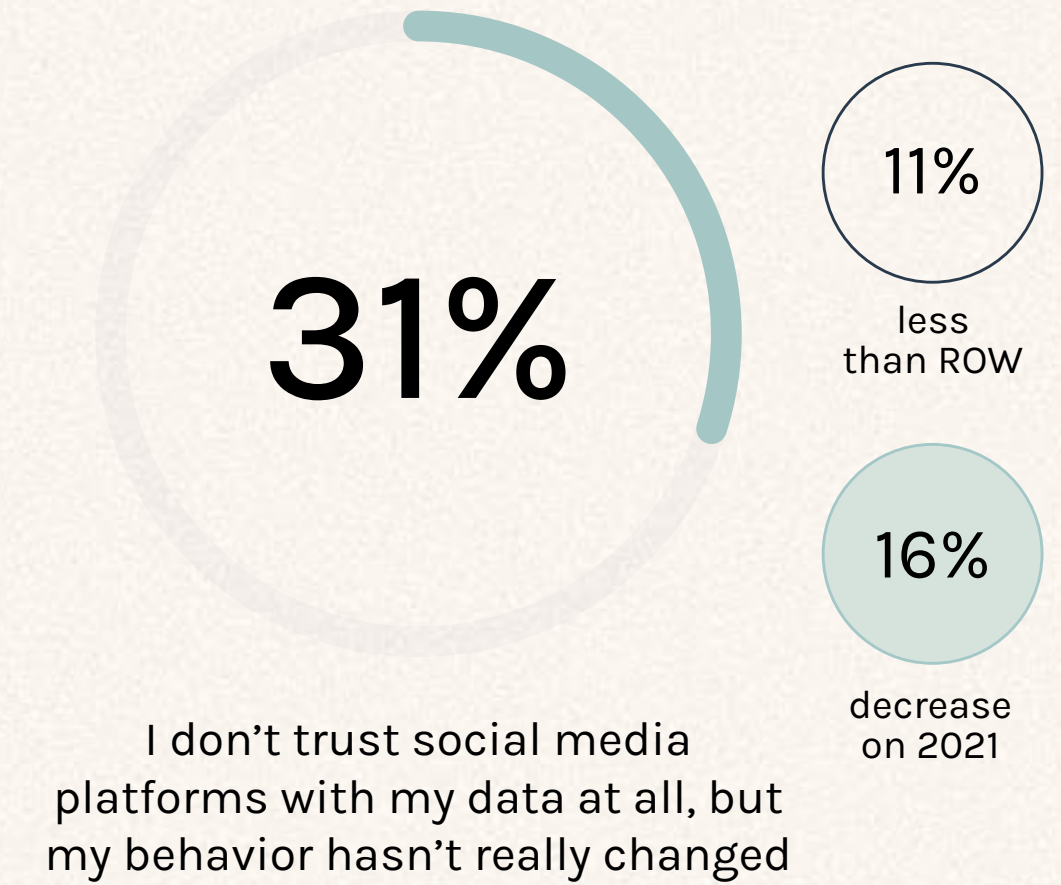
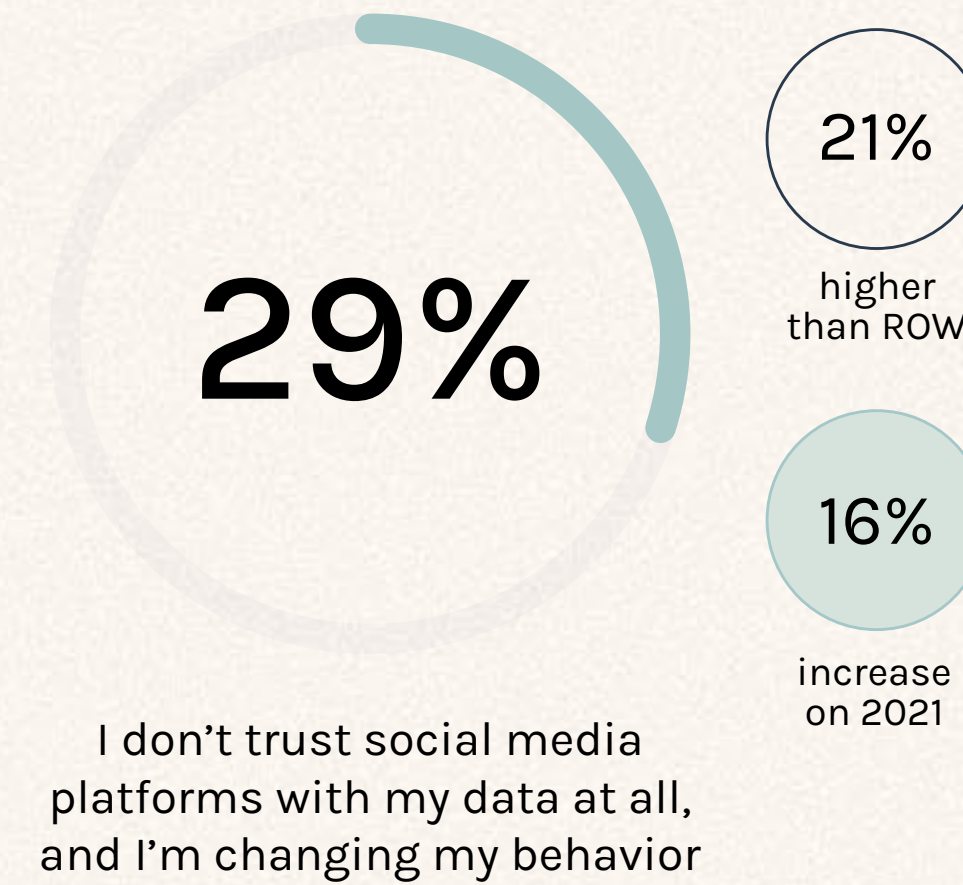
# U.S. Consumer Trust in Social Media Channels at an All-Time Low

The deep mistrust of social media comes after a difficult spell for the sector in which Facebook et al., have been accused of eroding privacy and undercutting democracy. The Cambridge Analytica scandal highlighted big tech's ability and willingness to harvest data while there have been countless examples of misinformation throughout the last year alone.

Only a quarter of U.S. consumers trust social media platforms (7% less than the rest-of-the-world), and 60% are clear that they don't - half of which are modifying their behavior. Interestingly 12% of U.S. consumers believe their data is out of there no-matter-what - 20% higher than the rest of the globe and 26% higher than 2021. Perhaps Scott McNealy was right: "You have zero privacy anyway. Get over it."



# When it comes to social media platforms and the security of your personal information, which of the following statements best describes your attitude?





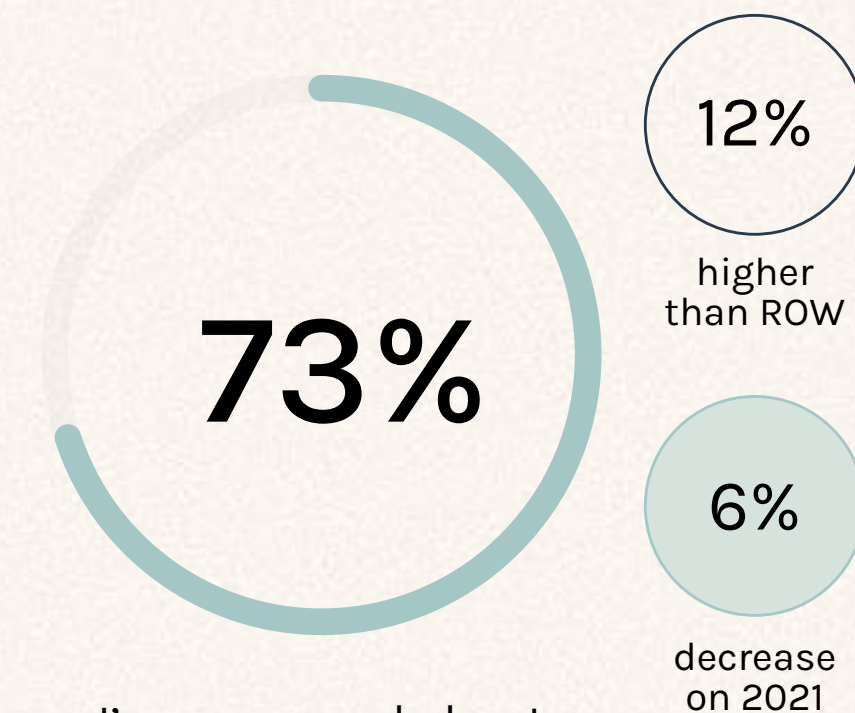
# U.S. Consumers are Tired of the Walled Gardens, Are You?

The data backs up that U.S. consumers just don't trust social media platforms any more. 71% are sharing less data, over a third are deleting their accounts (39%), and well over half are actively engaging less for their mental health (57%). The vast majority of consumers believe social media platforms don't do enough to delete harmful content (71%), and are guilty of fueling political polarization (73%).

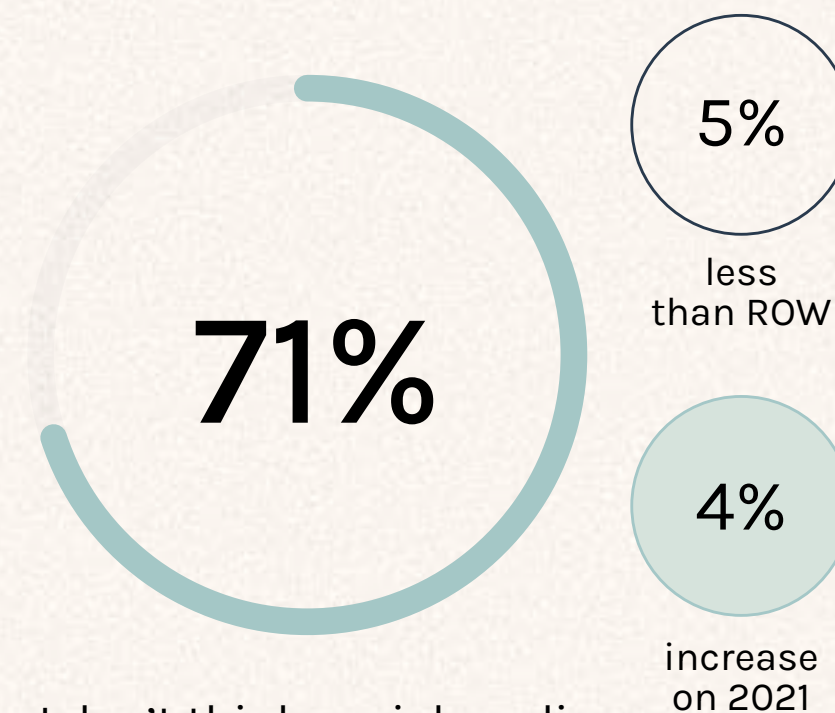
Marketers need to start reconnecting with modern consumers by switching from interruptions to experiences. Instead of erroneously spending money on pushing their message wider and further, they can shift to a strategy rooted in offering value for engagement, and begin to unlock customer relationships directly.



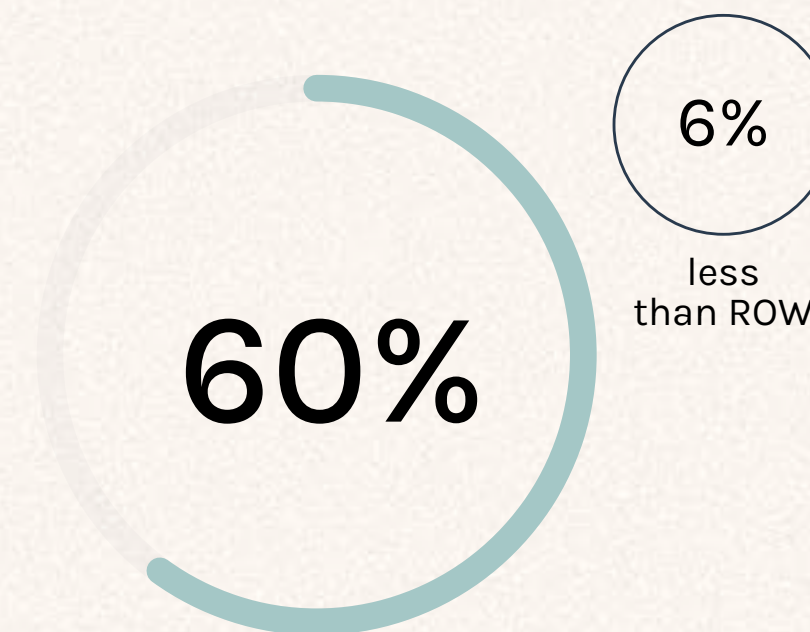
## And now some questions about your opinions and use of social media channels. Please note whether you agree with the following statements



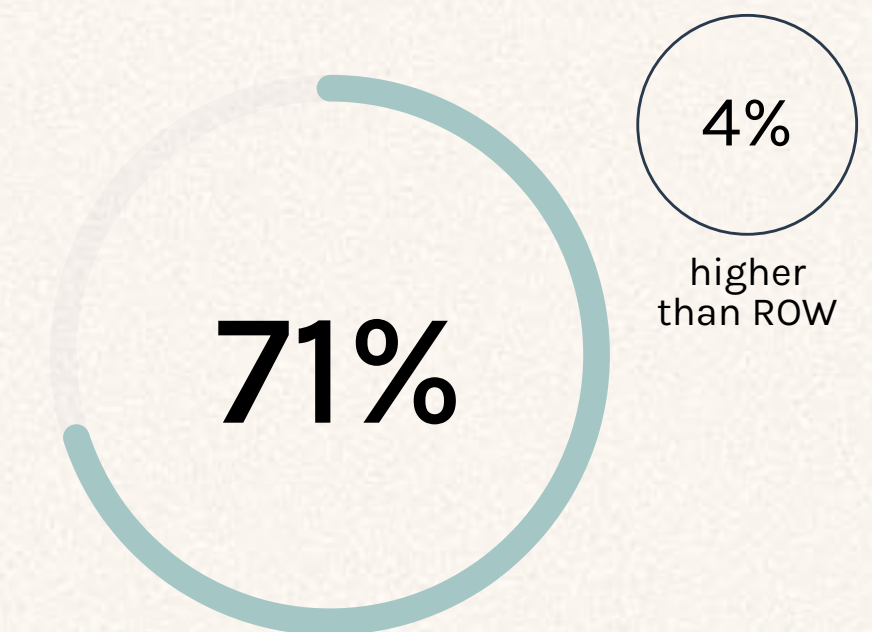
I'm concerned about the polarization of political opinion on social media



I don't think social media platforms do enough to delete harmful content



I don't trust advertising I see on social media



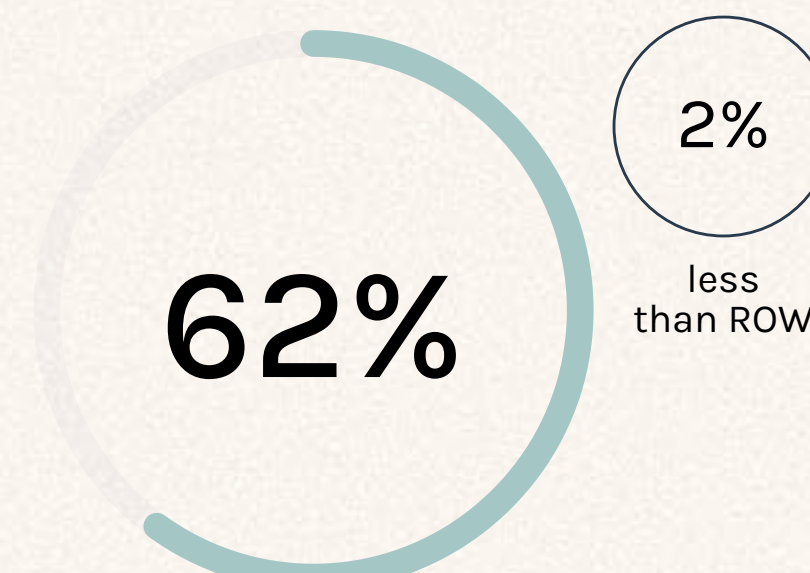
I'm sharing less data with platforms because it's too hard to track how it's being used



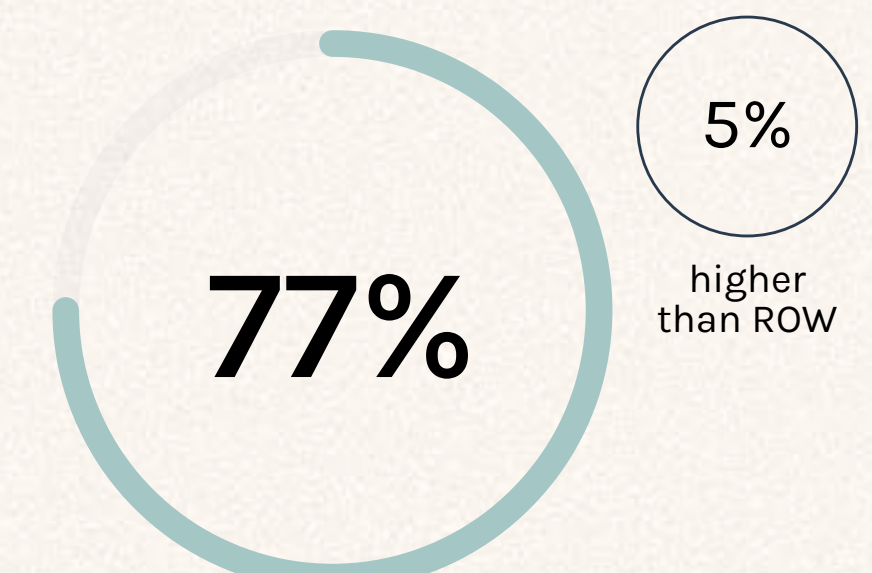
I have closed or stopped using an account in the last year because I have been upset by posts I have seen



I'm actively engaging less with social media for my mental health



I feel manipulated by the algorithms



I see a lot of content these days which doesn't interest me



# Cheetah Digital

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## Cheetah Engagement Data Platform

Our foundational data layer and personalization engine enables marketers to drive data from intelligent insights to action at speed and scale.



## Cheetah Experiences

We help deliver interactive digital acquisition experiences that will delight customers, collect first and zero-party data, and secure valuable permissions needed to execute compliant and successful cross-channel marketing campaigns.



## Cheetah Messaging

We enable marketers to create and deliver relevant, personalized marketing campaigns across all channels and touchpoints.



## Cheetah Loyalty

We provide marketers with the tools to create and deliver unique loyalty programs that generate an emotional connection between brands and their customers.



## Cheetah Personalization

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