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The Future Priorities of Global Retailers and CPG Brands

How Companies Are Steering Their Data Strategies and Technology Investments to Meet the Needs of Today's Omnichannel Consumer

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Executive Summary

Retailers and CPG brands around the world depend on data to deliver personalized experiences to their customers, but also for important operational benefits. These include predictive capabilities, the ability to move products to strategic sales locations and the means to generate customer profiles so they can make decisions regarding their marketing and loyalty programs.
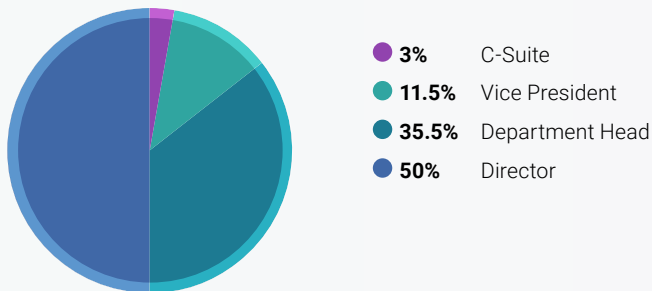
Although most companies are now data-rich, they also struggle with outdated technologies, manual processes and customer touchpoints that don't deliver usable insights.

This report explores how retail and CPG brands are evolving their strategies and technology investments to meet the needs of today's omnichannel consumers, obtain better visibility into their supply networks and work toward a more sustainable future. It also focuses on what technology investments these organizations plan to make in the near term to address their most pressing data challenges.
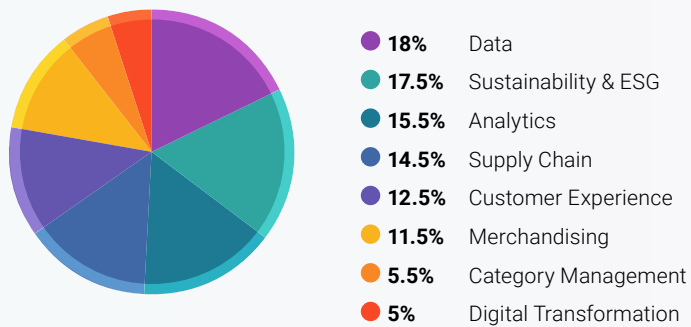
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About the Respondents

The WBR Insights research team surveyed 200 respondents from omnichannel retailers and consumer packaged goods (CPG) companies across North America, Europe, the Middle East, Africa and the Asia Pacific to generate the results featured in this study.

What is your seniority?

- **3%**   C-Suite
- **11.5%**   Vice President
- **35.5%**   Department Head
- **50%**   Director

What is your role?

- **18%**   Data
- **17.5%**   Sustainability & ESG
- **15.5%**   Analytics
- **14.5%**   Supply Chain
- **12.5%**   Customer Experience
- **11.5%**   Merchandising
- **5.5%**   Category Management
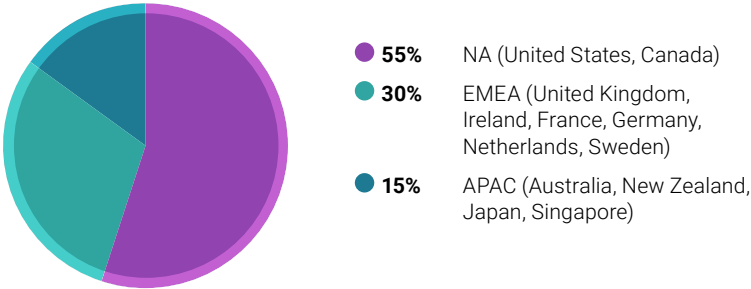- **5%**   Digital Transformation

18% of respondents occupy roles in data

Half of the respondents are directors. The remaining respondents are department heads (35.5%), vice presidents (11.5%) or C-suite executives (3%).

The respondents occupy roles in data (18%), sustainability and ESG (17.5%), analytics (15.5%), and supply chain (14.5%), among others.

At 55%, most of the companies represented in the study are headquartered in North America. The remaining companies are headquartered in the EMEA (30%) or APAC (15%) regions.

In which of the following regions is your company headquarters located?

- **55%** NA (United States, Canada)
- **30%** EMEA (United Kingdom, Ireland, France, Germany, Netherlands, Sweden)
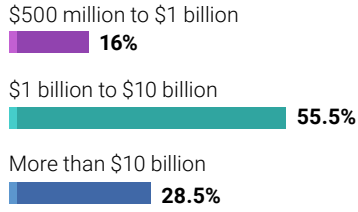- **15%** APAC (Australia, New Zealand, Japan, Singapore)

The company types represented in the study include CPG brands (33.5%), vertically integrated brands (33.5%) and omnichannel retailers (33%).

Is your company a CPG brand, an omnichannel retailer or are you vertically integrated?

- **33.5%** CPG brand
- **33.5%** Vertically integrated
- **33%** Omnichannel retailer
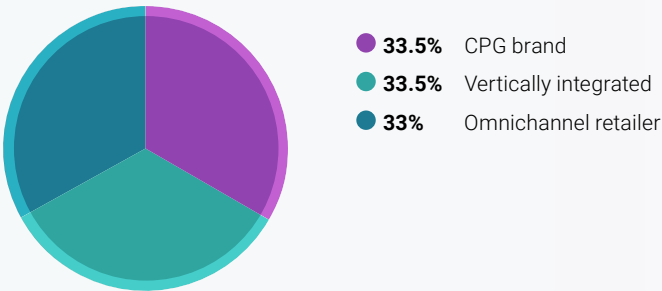
33.5% are vertically integrated

What is your company's annual revenue?

$500 million to $1 billion
16%

$1 billion to $10 billion
55.5%
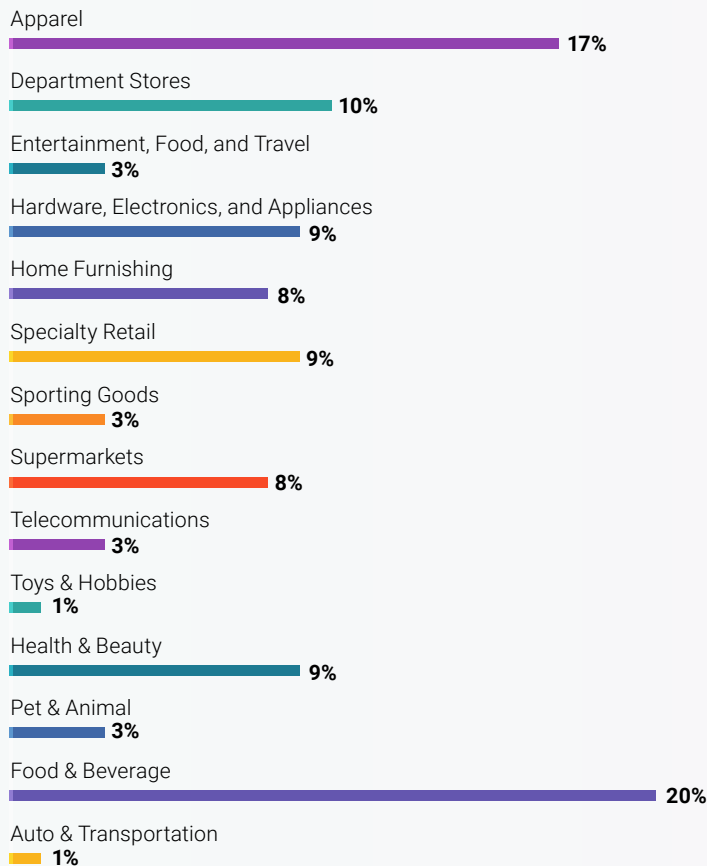
More than $10 billion
28.5%

The companies that participated in the study represent a variety of verticals. Notably, 17% are apparel companies, 20% are food and beverage companies and 10% are department stores.

At 55.5%, most of the companies represented in the study make $1 billion to $10 billion in annual revenue. More than one-quarter (28.5%) make more than $10 billion in annual revenue.

20% represent Food & Beverage

What type of CPG brand do you represent?

Apparel
17%

Department Stores
10%

Entertainment, Food, and Travel
3%

Hardware, Electronics, and Appliances
9%

Home Furnishing
8%

Specialty Retail
9%

Sporting Goods
3%

Supermarkets
8%

Telecommunications
3%

Toys & Hobbies
1%

Health & Beauty
9%

Pet & Animal
3%

Food & Beverage
20%

Auto & Transportation
1%

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Key Insights among the respondents:

Customer Experience (CX)

▸ The three most important goals for the next two years are:

- Enhancing CX with personalization (**46.5%**)
- Delivering a truly omnichannel buying experience (**46%**)
- Scaling artificial intelligence (AI) and/or machine learning (ML) for CX improvements (**45%**)

▸ **71%** say their organizations are only somewhat effective at optimizing the omnichannel buying experience.

▸ **56%** consider their organizations only somewhat effective at optimizing personalization in the customer experience.

▸ **51.5**% say delivering a seamless shopping experience to customers across both physical and digital channels is one of the two biggest challenges they expect to struggle with over the winter shopping season.

Environmental, Social, and Governance (ESG)

▸ **58.5%** say they can enforce their ESG requirements among most of their suppliers, while **21.5%** say they can do so among all their suppliers.

▸ The most important ESG priorities over the next two years are:

- Pursuing value chain due diligence and the circular economy (**68.5%**)
- Achieving regulatory compliance and reporting (**68%**)
- Integrating ESG into all business operations (**67.5%**)
- Measuring the impact of ESG efforts (**58%**)

▸ Only **30%** of CPG brands say achieving ESG regulatory compliance and reporting is a very important priority over the next two years, compared to **94%** of omnichannel retailers.

▸ **51%** say they have ESG guidelines, and they contribute at least some funding to ESG; **41%** have formal ESG requirements and have a set budget for ESG.
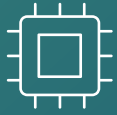
Supply Chain

▸ **76%** are only somewhat effective at optimizing supply chain efficiency.

▸ **39.5%** say offering the right assortment of goods with proper inventory levels is one of the two biggest challenges they expect to struggle with over the winter shopping season.

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Key Insights Continued
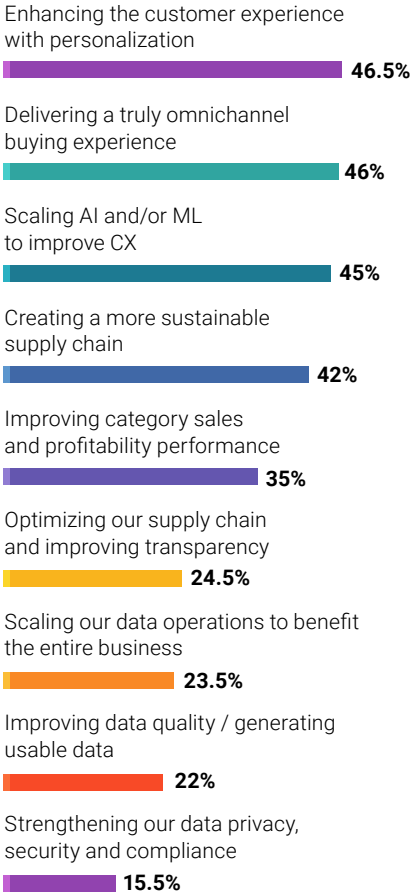
Technology Priorities

▸ **63.5%** say breaking down data silos is a very significant challenge to achieving their goals, while **48%** say the same about operationalizing AI/ML.

▸ **66%** say their data management capabilities are only somewhat "unified" — they can manage, integrate and analyze data from some aspects of their business.

▸ The most important data management priorities over the next two years are:

- Integrating data across the organization (**80%**)
- Improving data quality (**77.5%**)
- Data privacy and compliance (**75%**)
- Data governance (**70.5%**)
- Cataloging data from business domains (**57.5%**)

▸ Their most important priorities for AI and ML over the next two years are:

- Automating repeatable processes like data analysis (**86%**)
- Analyzing customer behavior to improve CX (**82.5%**)
- Delivering advanced insights like supply chain trends (**82%**)
- Operationalizing AI/ML across the enterprise (**72%**)

Retailers and CPG Brands Have Set Clear Goals for CX and Omnichannel

Which of the following are your three most important goals for the next two years?

Enhancing the customer experience with personalization
46.5%

Delivering a truly omnichannel buying experience
46%

Scaling AI and/or ML to improve CX
45%

Creating a more sustainable supply chain
42%

Improving category sales and profitability performance
35%

Optimizing our supply chain and improving transparency
24.5%

Scaling our data operations to benefit the entire business
23.5%

Improving data quality / generating usable data
22%

Strengthening our data privacy, security and compliance
15.5%

Consumers now expect a highly personalized, omnichannel shopping experience. Consumer-facing organizations must be able to leverage data and technology to deliver content, recommendations and UX designs that match consumer expectations.

Currently, many brands are recognizing that they lack the tools and analytics capabilities to accomplish this, so they are beginning to set goals to address their most pressing data challenges.

The respondents' three most important goals over the next two years are enhancing CX with personalization (46.5%), delivering a truly omnichannel buying experience (46%) and scaling AI and ML to improve CX (45%).

Notably, 42% of the respondents say creating a more sustainable supply chain is one of their most important goals for the next two years.

Personalization helps create a more relevant and engaging experience for customers, which can lead to increased satisfaction. By understanding individual preferences and needs, companies can tailor their offerings and interactions to better suit each customer, making them feel valued and understood.

For omnichannel, companies are attempting to integrate all their sales and making channels, including brick-and-mortar stores, e-commerce websites, mobile apps, social media and more, to provide customers with a seamless and consistent shopping experience.
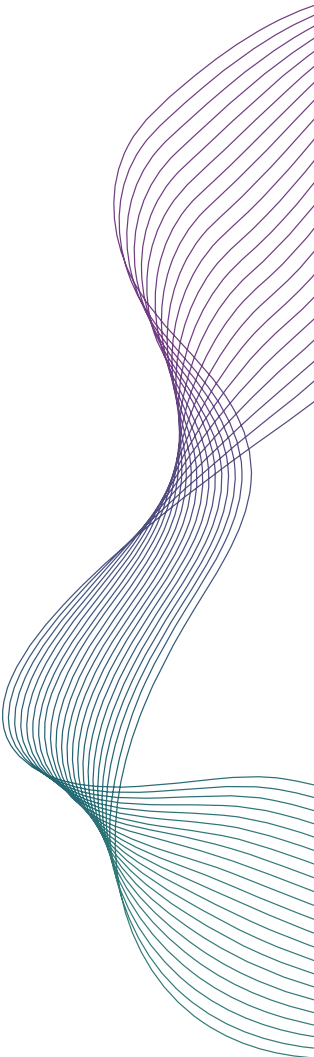
This strategy involves using data to understand customer behavior and preferences across all channels and utilizing that data to provide personalized experiences, targeted promotions and relevant product recommendations.

Operationalizing AI for CX and Omnichannel Is a Challenge

AI and ML can play a role in these strategies. For personalization, AI can serve as an engine for delivering recommendations to customers. It can also help customers address issues through AI chatbots and other means.
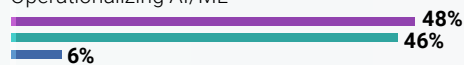
How significant are the following data challenges in your efforts to achieve your goals?

● Very significant challenge ● Somewhat significant challenge ● Not a significant challenge
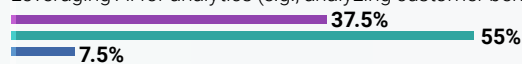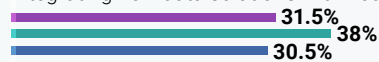
Breaking down data silos
- 63.5%
- 32.5%
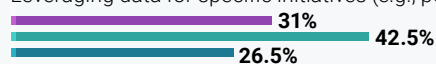- 4%
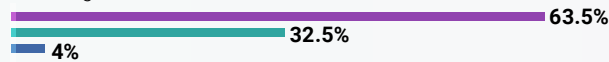
Operationalizing AI/ML
- 48%
- 46%
- 6%

Leveraging AI for analytics (e.g., analyzing customer behavior, variable pricing, fraud detection)
- 37.5%
- 55%
- 7.5%

Integrating new data solutions with necessary legacy systems
- 31.5%
- 38%
- 30.5%

Leveraging data for specific initiatives (e.g., personalization)
- 31%
- 42.5%
- 26.5%

Orchestrating data from multiple sources for viable analysis
- 30%
- 41%
- 29%
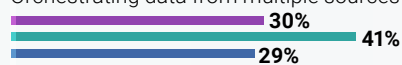
Generating meaningful data from supply partners
- 21.5%
- 56.5%
- 22%
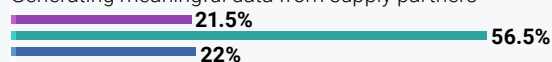
Managing and analyzing increasingly large quantities of data
- 26%
- 41%
- 33%

Complying with data privacy regulations
- 28%
- 18.5%
- 53.5%
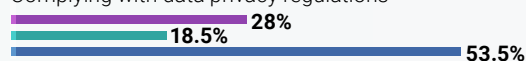
63.5% agree that breaking down data silos is a very significant data challenge to achieving their goals.

48% say operationalizing AI/ML is also a very significant challenge.

To achieve these goals, many retailers and CPG brands must first overcome some significant challenges, many of which relate to their ability to leverage data effectively.

Most of the respondents (63.5%) agree that breaking down data silos is a very significant data challenge to achieving their goals.

For these companies, various data types may be sequestered into different databases or formatted differently because they come from disparate sources or are generated by differing types of technologies. This can make it difficult to structure data properly for uses like personalization, but also for automating internal processes.

Almost half of the respondents (48%) say operationalizing AI and ML is a very significant challenge. Although the utilization of AI has grown significantly in the past two years in a variety of contexts, many companies are still discovering use cases for the technology. Indeed, 55% of the respondents say leveraging AI for analytics is a somewhat significant challenge, while 37.5% say it is a very significant challenge.

AI technology itself is still developing as well, and new AI-based products are entering the market regularly. This may lead some companies to struggle with AI adoption, as programs they invest in could become obsolete quickly.

Accurate Supply Chain Data Leads to a Better Customer Experience

At 56.5%, most of the respondents also say generating meaningful data from supply partners is a somewhat significant challenge. Retailers and CPG brands have taken steps in recent years to make their supply chains more transparent, but the global nature of supply chain economics has made it challenging to integrate suppliers' various systems with the organization's and achieve data synchronicity.

"The data required for personalization still comes in fragmented. We are working on including ML tools for this purpose."

- A director of analytics at a food and beverage company

With which of the following two challenges are you expecting to struggle the most during this year's winter shopping season?

Delivering a seamless shopping experience to customers across both physical and digital channels
51.5%

Offering the right assortment with proper levels of inventory to meet seasonal spikes
39.5%

Managing complex product content in digital commerce environments
32.5%

Leveraging data to enhance sales through personalized offers and messaging
32.5%

Optimizing our supply chain for inventory and fulfillment purposes
29.5%

Ensuring compliance and reducing risk
14.5%

Many companies are working to address these challenges as soon as possible.

A slight majority of the respondents (51.5%) agree that delivering a seamless shopping experience to customers across both physical and digital channels will be one of their most significant challenges during this year's winter shopping season. Meanwhile, 39.5% say offering the right assortment of products, with proper levels of inventory to meet seasonal spikes, will be the second-most common challenge.

Brands Can Leverage Data to Address Inventory and CX Needs

Addressing both challenges will require companies to leverage data effectively. They will need to lean on supply chain data to ensure products are in the right places at the right times when spikes in demand appear. Likewise, customer data will be critical to delivering personalization and seamless shopping experiences across channels.

Most of the respondents believe they have made some progress in optimizing business imperatives in the omnichannel environment. Specifically, 71% say they are somewhat effective at optimizing the omnichannel buying experience, while 76% say they are somewhat effective at optimizing supply chain efficiency.

Nonetheless, very few of the respondents believe they are "very effective" at either of these business imperatives.

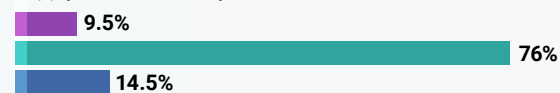**In your view, how effective is your company at optimizing the following two business imperatives in today's omnichannel environment?**

- Very effective
- Somewhat effective
- Not very effective
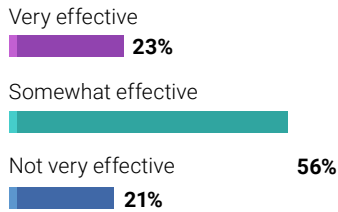
The omnichannel buying experience
- 16.5%
- 71%
- 12.5%
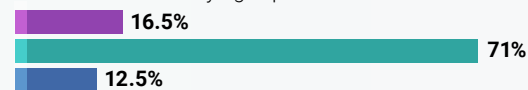
Supply chain efficiency
- 9.5%
- 76%
- 14.5%

76% say they are somewhat effective at optimizing supply chain efficiency.

In your view, how effective is your company at optimizing personalization in CX in today's omnichannel environment?

Very effective
23%

Somewhat effective
56%

Not very effective
21%

Similarly, 56% of the respondents say they are only somewhat effective at optimizing personalization in CX. Only 23% say they are very effective, while 21% say they are not very effective.

Among those respondents who say they are not very effective at optimizing personalization in CX, many say they lack the analytical capabilities to generate insights fast enough. Others say they struggle with slow data processes or that the data they receive is inaccurate.

"Consumer data is inaccurate and delayed, which makes it difficult to get fast and clear insights," says a C-level analytics executive from a food and beverage brand.

Similarly, a department head from an apparel company says, "Customers provide limited data, which hampers personalization. Adding more data-generating touchpoints is crucial for this process."

Overall, these respondents are struggling with touchpoints that don't encourage customers to provide the types of data they need. They are also struggling with data silos, data fragmentation, slow analytics processes and manual processes that make it difficult to leverage data in real time.

Other respondents say their biggest challenges lie in "creativity." Although they have the data they need, it is challenging to create meaningful content for customers quickly.

> **"Customer data is inaccurate and delayed, which makes it difficult to get fast and clear insights."**
>
> **- A C-level analytics executive from a food and beverage brand**

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ESG Is Becoming a More Important Factor in Operations

How are you currently using ESG factors in your supply chain sourcing methodology?

We can enforce our ESG requirements among all our suppliers.

21.5%

We can enforce our ESG requirements among most of our suppliers.

58.5%

We can enforce our ESG requirements among our most critical suppliers, but not others.

19%

We don't enforce ESG requirements among our suppliers or we only provide suppliers with ESG guidelines.

1%

Not long ago, the concept of an ESG strategy within organizations was the sole purview of activist investors and concerned consumers. Now, most consumer-facing companies have embraced ESG, at least to some extent, as a unifying factor for their operations.

There are also global mandates on enforcing ESG among supplies in some countries. For example, as of January 2024 the U.S. Securities and Exchange Commission (SEC) has mandated that all publicly listed companies must report on their ESG performance using the Task Force on Climate Related Financial Disclosures (TCFD) framework.

Most brands have set at least some ESG goals, or they are at least aware of issues relating to ESG and why their customers care about them.

The report suggests that ESG issues are becoming more important in retailers' and CPG brands' decision-making regarding their data and customer strategies. These organizations are also addressing ESG issues in their supply chains, as risks among suppliers impact the company as well. Now, brands are attempting to enforce internal ESG guidelines among their global suppliers.

For example, most of the respondents (58.5%) say they can enforce their ESG requirements among most of their suppliers. Another 21.5% say they can enforce their ESG requirements among all their suppliers.

This suggests that companies are realizing that ESG enforcement in their supply networks isn't just the right thing to do; it can be an important factor for their brand.
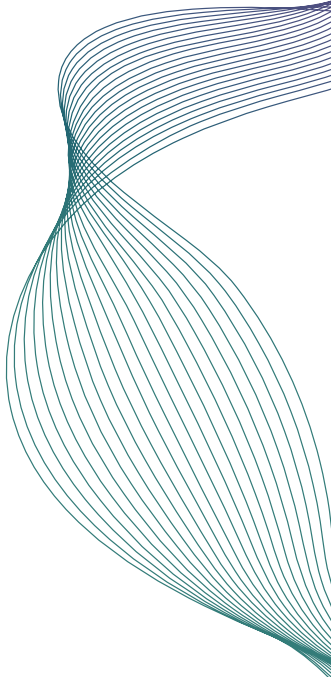
According to the Harvard Law School Forum on Corporate Governance, "Failure to ensure proper oversight and management of supply chains can result in significant reputational and economic losses, as well as regulatory scrutiny. Companies that invest in this area also benefit from competitive advantages, faster recovery from disruptions and, for those who wish to demonstrate leadership, broader impact."[1]
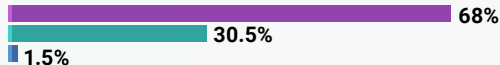
Which of the following are your most important ESG priorities over the next two years?

- This is a very important priority over the next two years.
- This is a somewhat important priority over the next two years.
- This is not an important priority / we are already satisfied with our capabilities in this area.
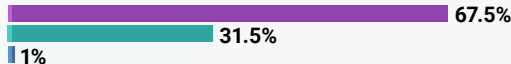
Pursuing value chain due diligence and the circular economy
- 68.5%
- 31.5%

68.5% say pursuing value chain due diligence and the circular economy is a very important priority over the next two years.
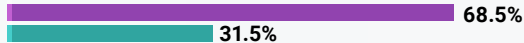
Achieving regulatory compliance and reporting
- 68%
- 30.5%
- 1.5%

Integrating ESG into all our business operations
- 67.5%
- 31.5%
- 1%

Measuring the impact of our ESG efforts
- 58%
- 40.5%
- 1.5%

Achieving net-zero carbon emissions
- 15%
- 65.5%
- 19.5%

Most of the respondents have also set clear ESG priorities for the next two years. In each case, more than 67% of the respondents say pursuing value chain due diligence and the circular economy, achieving regulatory compliance and reporting, and integrating ESG into all business operations are very important priorities over the next two years.

Meanwhile, 58% list measuring the impact of ESG efforts as a very important priority, while 65.5% say achieving net-zero carbon emission is somewhat important as a priority.

[1] Silk, David M., et. al. "The Other "S" in ESG: Building a Sustainable and Resilient Supply Chain." Harvard Law School Forum on Corporate Governance. August 14th, 2020. https://corpgov.law.harvard.edu/2020/08/14/the-other-s-in-esg-building-a-sustainable-and-resilient-supply-chain/

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Notably, only 30% of CPG brands say achieving ESG regulatory compliance and reporting is a very important priority over the next two years, compared to 94% of omnichannel retailers. This suggests that CPG brands are ahead of their retail counterparts in achieving accurate ESG reporting — it is no longer a priority because they've already made significant strides.

This is likely because CPG manufacturing is more tightly regulated from an ESG standpoint when compared to the retail industry. Because of this increased scrutiny, these manufacturers have spent more time and resources enforcing ESG guidelines in the supply chain.

How does ESG currently fit into your organizational structure?

We have formal ESG requirements and have a set budget for ESG.
41%

We have ESG guidelines and contribute at least some funding to ESG.
51%

We are just beginning to explore how we can apply ESG principles to our organization.
8%

Nonetheless, many retailers and CPG brands around the world still struggle with their ESG initiatives due to a lack of data, data silos or a lack of core integration into their operations. For example, about half of the respondents (51%) say they have ESG guidelines and contribute at least some funding to ESG, but only 41% say they have formal ESG requirements and have a set budget for ESG projects.
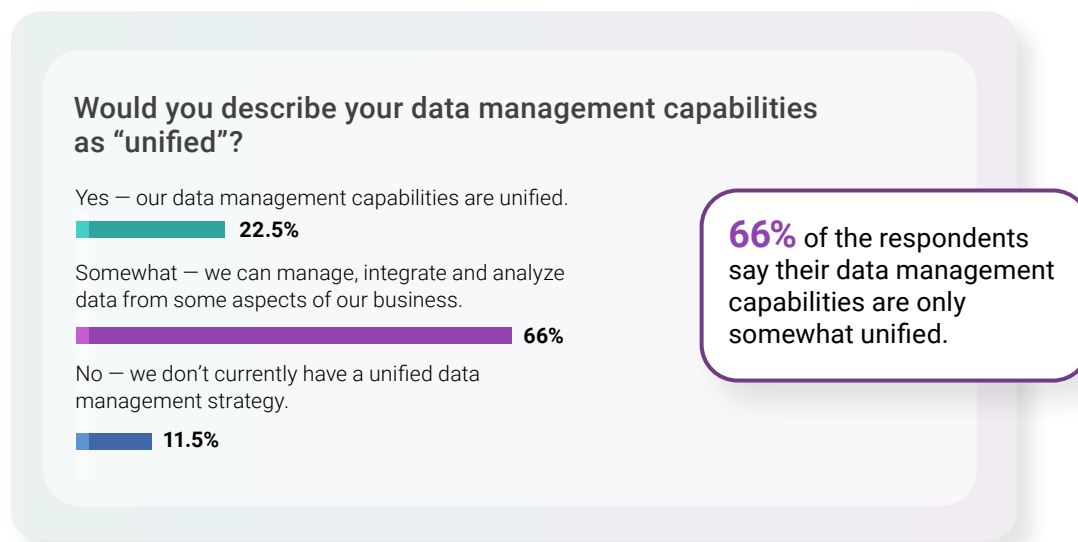
Some of the respondents (8%) say they are just beginning to explore how they can apply ESG principles to their organizations. In these instances, the companies haven't formalized ESG as a part of their business operations, nor have they devoted resources to enforcing ESG guidelines internally and among their suppliers.

Rectifying these gaps may require investments in ESG intelligence technology and data analytics. It will also require company leaders to audit the current state of their ESG standards, so they can set clear goals for the future.

Most Companies Face Gaps in Their Data Management Capabilities

As we've learned, most of the companies in the study have established goals for improving the omnichannel customer experience, enhancing their use of emerging technologies like AI and improving ESG enforcement. However, the study suggests that most of the respondents still face gaps in their data management capabilities, either due to a lack of technology or issues relating to technology synchronization and data analysis.
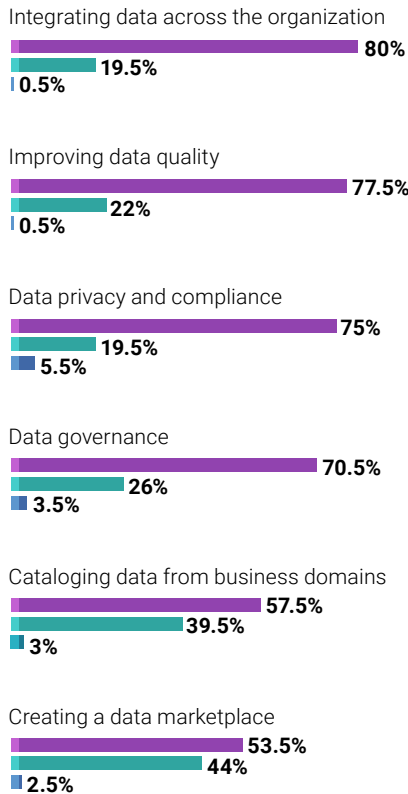
Would you describe your data management capabilities as "unified"?

Yes — our data management capabilities are unified.

22.5%

Somewhat — we can manage, integrate and analyze data from some aspects of our business.

66%

No — we don't currently have a unified data management strategy.

11.5%

66% of the respondents say their data management capabilities are only somewhat unified.

In this context, "unified" means the company can easily manage, integrate and analyze data from every aspect of the business, including its omnichannel strategy, its supply chains and its personalization tools.

The companies whose data operations are only somewhat unified can only do so from some aspects of the business. That means they are missing opportunities to leverage data from some sources, as that data may be siloed or otherwise unusable.

Similarly, 11.5% of the respondents say they don't currently have a unified data management strategy at all. These organizations are struggling with technologies that don't communicate with each other, or they cannot analyze datasets to generate insights for a variety of contexts.

Which of the following are your most important data management priorities over the next two years?

- This is a very important priority over the next two years.
- This is a somewhat important priority over the next two years.
- This is not an important priority / we are already satisfied with our capabilities in this area.

Integrating data across the organization
- 80%
- 19.5%
- 0.5%

Improving data quality
- 77.5%
- 22%
- 0.5%

Data privacy and compliance
- 75%
- 19.5%
- 5.5%

Data governance
- 70.5%
- 26%
- 3.5%

Cataloging data from business domains
- 57.5%
- 39.5%
- 3%

Creating a data marketplace
- 53.5%
- 44%
- 2.5%

An Enterprise Data Management Platform Can Unify CX, Supplier and Operational Data

Not surprisingly, 80% of the respondents say integrating data across the organization is a very important priority over the next two years. Another 19.5% say it is a somewhat important priority.

Accomplishing this will require companies to synchronize their technologies across departments and structure data from disparate sources so it can be leveraged in specific contexts. For example, supply chain data can shed light on the issues of logistics, supplier compliance and sourcing, but it can also be used to inform customers about the availability of products. Likewise, consumer demand data can be leveraged by procurement and supply chain leaders to make predictions about future demand, so they can line up their supply needs accordingly.

When data is unified across the organization, it can improve internal operations as well as CX.

To supplement their data integration strategies, the respondents also believe it will be very important to improve data quality (77.5%), enhance data privacy and compliance (75%) and improve data governance (70.5%).

In each case, a majority of the respondents also believe it will be very important to catalog data from their various business domains (57.5%) and create a data marketplace to monetize data (53.5%).

AI and ML will also be important factors in retailers' and CPG brands' technology strategies over the next two years. Generative AI has already emerged as a groundbreaking technology for marketers and CX leaders, but most consumer-facing companies have only just begun to explore its applications.
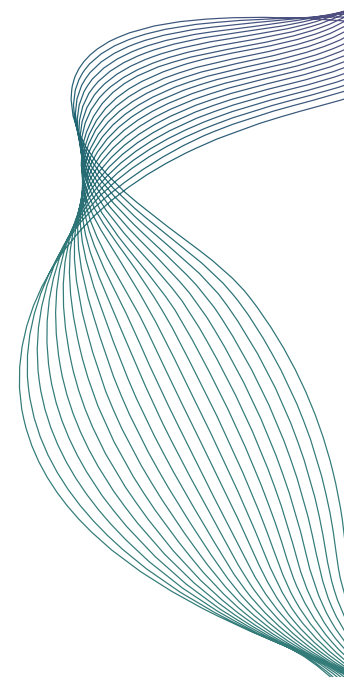
In each case, almost all the respondents agree that it will be very important to leverage AI to automate repeatable internal processes like data analysis (86%), analyze customer behavior to improve the customer experience (82.5%) and deliver advanced insights like supply chain trends (82%). Most (72%) also believe it will be very important to operationalize AI and ML across the enterprise, so it can be used in various contexts and in various departments to improve efficiency.

Still, the most immediate impact of AI and ML over the next two years will likely be felt within CX.

Companies are already leveraging these technologies to analyze vast amounts of data, identify patterns and gain insights into consumer behavior. When this is done effectively, this information can then be used to create personalized marketing campaigns and promotions that are tailored to individual customers.

Which of the following are your most important priorities for artificial intelligence and machine learning over the next two years?

- This is a very important priority over the next two years.
- This is a somewhat important priority over the next two years.
- This is not an important priority / we are already satisfied with our capabilities in this area.

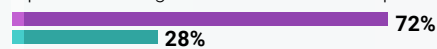Automating repeatable processes (e.g., data analysis)
86%
14%
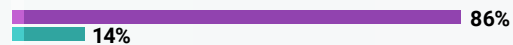
Analyzing customer behavior to improve the customer experience
82.5%
17.5%
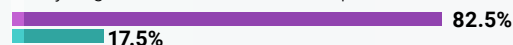
Delivering advanced insights (e.g., supply chain trends)
82%
17%

Operationalizing AI/ML across more departments
72%
28%

86% agree that it will be very important to leverage AI to automate repeatable processes.

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Conclusion: Data and Technology Transformation Over the Next Two Years

Although retailers and CPG brands around the world have made strides in unifying their data operations and improving the omnichannel customer experience, the results of the study suggest that plenty of challenges remain.

Respondents who say they struggle to personalize CX are clear that their real struggle is with data. Data silos are still prevalent within their organizations, and they lack the capabilities to generate clear customer profiles for efforts like personalization.

The respondents' progress toward ESG enforcement is encouraging. However, most of the respondents indicate that they still don't have established budgets for ESG, thereby making it difficult to enforce established ESG guidelines among their suppliers.

Finally, the respondents make it clear that AI and ML are set to transform their operations over the next two years, if only by helping them automate many of their manual processes. This technology will likely appear first within CX, then continue to deliver efficiencies as companies discover new use cases.

Key Suggestions

1 **Develop a unified data management strategy to easily manage, integrate and analyze data from all aspects of the business.**

This includes your omnichannel strategy, supply chains and customer personalization solutions. It is important to ensure that the data is synchronized across departments so it can be leveraged in the right contexts.

2 **Prioritize data quality, privacy and compliance, and data governance to ensure you can leverage your datasets effectively.**

Catalog data from various business domains, then use a cloud data management platform to generate clarity across the business.

3 **Leverage AI and ML to automate repeatable processes, improve CX and gain insights into consumer behavior.**

This technology can be used to create personalized campaigns and promotions for customers, as well as streamline internal processes.

4 **Establish clear ESG guidelines and enforce them among suppliers.**

This will require data analysis technologies as well as platforms that grant them more visibility into their supply chains.

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