

THE NEW CUSTOMER

PATTERNS AND PERSONAS

“FOREVER ALTERED.”

“BEYOND RETURN.”

“NOTHING WILL EVER BE THE SAME AGAIN.”*

If anything justified such dramatic proclamations from executives, it was the COVID-19 pandemic—a truly global, simultaneous shock. Long-consistent customer behaviors shifted in days or even hours.

How people spent their time and what they valued took a radical turn.

Three years later, it's time to assess:

- Which changes actually stuck, and which reverted to pre-crisis norms?
- Who is this New Customer, and how does that customer behave?

World 50 conducted interviews with 20 senior executives to examine these questions, gathering cross-functional insights on their customers' spending, technology, and preferences.

What is clear is that they feel that the landscape has changed, with 90% of respondents to a World 50 poll agreeing that consumer behaviors had changed either significantly or moderately.

In this multimedia report, we highlight the preferences and patterns that define this New Customer. We also share best-practice examples of how companies are responding.

Comparing today to 2019, to what extent do you feel that consumer behavior has changed?



N = 59

*The Pandemic Altered Shopping Habits Beyond Return (The Wall Street Journal, June 2021)
[6 ways the coronavirus pandemic has forever altered the retail landscape](#) (CNBC, September 2020)
[These eight charts show how COVID-19 has changed B2B sales forever](#) (McKinsey, October 2020)

EXECUTIVE SUMMARY

I. CHANGE IS REAL.

90% of respondents to a World 50 poll said that customer behavior has changed either significantly or moderately since 2019.

II. PEOPLE WANT THE PREDICTABLE.

After so much turbulence and change, customers are reaching out for experiences, products, and services that promote a sense of rhythm or safety. CBS' Radha Subramanyam called this a "desperate quest for the normal."

III. OMNICHANNEL ISN'T OPTIONAL.

If you can't offer a truly customer-friendly experience both on- and offline, you're going to lose in the marketplace. The pandemic raised the bar for digital experiences, while its end accelerated the desire to interact in person.

IV. PERSONALIZATION HAS SCALED.

Rapid advancements in generative AI and the further fragmentation of society mean it's finally possible to look at a customer as one individual. This is quickly becoming an expectation rather than a differentiator, said several executives.

V. CUSTOMERS CRAVE EXPERIENCES.

Consumers are spending more money on experiences and less on goods as they try to make up for lost time. Travel and restaurants are just two of the industries that continue to rise despite inflationary pressures.

VI. WELLNESS WINS.

Customers are focused on wellness—whether that means personal care, psychology, or even their pets, which Zoetis' Wetteny Joseph said may be linked to health benefits.

VII. THE ECONOMY IS EXISTENTIAL.

Polled about which factors have most affected companies' customer-facing strategies, 58% of respondents selected economic pressures as the most significant, with only 12%-14% choosing geopolitical events, hybrid work, or AI as the top category.

VIII. ESG IS UNDER PRESSURE.

Executives reported cuts to ESG-related spending because of economic uncertainty, but they cautioned that customers still expect ties to sustainability and diversity, even if they don't necessarily want to pay for the added costs.

“A DESPERATE QUEST FOR THE NORMAL.”

The one thing the past three years has demonstrated is that the unexpected keeps happening—and usually not in a good way: war, pandemic, bank shocks, inflation, political turmoil, and more. No one is immune. What’s more, the speed of change has accelerated to the point that neither companies nor customers have adequate time to respond, with the most obvious recent example being the \$42 billion outflow of cash at Silicon Valley Bank in a single day. Said Doug Conant, former CEO of Campbell Soup Company and founder of ConantLeadership, “With all this change, we are seeing anxiety at an all-time high for consumers.”

What the customer craves now is something elusive: predictability. “The basic thing we are seeing is a desperate quest for the normal,” said Radha Subramanyam, president and chief research and analytics officer at CBS. “We all understand—whether you’re a consumer or a B2B customer—that normal may mean something different than it did a few years ago, but that’s not what people are thinking about. ... What I’m really sensing is a quest for predictability, a little bit of control over their lives ... and also a desire for rhythm.”

At CBS, that translates to an emphasis on seasonality in programming—a “proper fall season,” in Subramanyam’s words. It’s counterintuitive in the age of binge-watching, but CBS has reported both an increase in “appointment” watching and in planned live events, such as sports and the Grammys. “Watching TV in a cyclical sense brings a sense of normalcy,” she said. “So does going to the mall. So does going to the movies. ... Paramount brought back audiences with *Top Gun*.”

“What I’m seeing is this hybridity: We keep the best of what we learned during the pandemic, but we also really liked parts of our lives before,” said Subramanyam. “And so, we are regaining that rhythm and that normalcy where it makes sense and evolving our lives where it doesn’t.”

OMNICHANNEL: NOT OPTIONAL

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THE B2C EXPERIENCE THAT EVERYONE RESORTED TO IN THE PANDEMIC BECAUSE THEY HAD NO CHOICE BECOMES THE NEW REALITY. ... THAT IS THE YARDSTICK NOW, AND THERE IS NO GOING BACK.

— Elisabeth Zornes, Chief Customer Officer, Autodesk

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Before the pandemic, some companies used their digital customer interface as a differentiator. Then, out of necessity, even the late-adopter customers in both the B2C and B2B spaces became comfortable with online channels. What is fascinating, executives said, is what has emerged since then: a customer who expects digital fluency from their sales channels, but also who has reclaimed the option to interact in person when they want to. This means that there is no excuse for mediocrity in any channel; an antiseptic online-only experience can be as alienating as a similar bricks-and-mortar-only presentation. “Not everyone wants to be 100% digital,” said Jessica Barker, chief digital and client experience officer at TIAA.

At Darden Restaurants, people have returned in full force to in-person dining, said Raj Vennam, Darden’s chief financial officer. Yet at the same time, what he called “off-premise” dining—which encompasses both delivery and pickup for at-home eating—has risen from 15% of total sales at Olive Garden to 25%. To make the customer experience seamless in both areas, Darden has enhanced its mobile app and website and has added an online waitlist for in-person dining. “These things make it more convenient for consumers,” he said. “They don’t want to wait.”

Replicating that seamless customer experience is particularly challenging for B2B companies, many of whom lagged consumer companies in this area during the pre-pandemic era. “The B2C experience that everyone resorted to in the pandemic because they had no choice becomes the new reality. ... That is the yardstick now, and there is no going back,” said Elisabeth Zornes, chief customer officer of Autodesk. “Customer expectation has moved on dramatically, and we believe that this will become a differentiator in competitiveness of companies. It’s a race to really get to a point where you feel like you can close that expectation gap.”

At Juniper Networks, the pandemic forced much of the sales process online for good. But today, how customers interact with that process has changed again. “During the pandemic, Juniper Networks was forced to execute a lot of our sales processes online and, as we move forward, it has allowed us to recognize that how customers interact during that process has changed,” said Brian Cooper, vice president, marketing. “We’re seeing a strong desire from our customers and end users to engage in person again, but we are still investing and having success with our digital approach. So, how can we find the right balance?”

Cooper and his team decided to break down the buyer’s journey, looking at how customers and prospects interacted with the classic four steps: awareness, interest, decide, and engage. One realization they had was that customers did 70% of their research online before their very first interaction with a sales representative. As a result, Juniper upgraded its marketing content model to deliver the information customers needed in the early phase of the journey. In addition to providing more content, including infographics and webinars, Juniper sought to do so with more creativity and even humor.

Enhanced analytics and data have also revealed how different people are involved in a buying decision—and the need to offer targeted information for a specific experience, for example, an engineer assessing capabilities versus a buyer looking at price. The biggest requirement in this new environment is that the underlying technology and the marketing content must work together at every stage of the buyer's journey, said Cooper. "The modern salesperson has to move away from being [simply] relationship driven; they have to be data driven."



ResMed

CASE STUDY: STREAMLINING THE ONLINE CUSTOMER EXPERIENCE

For ResMed, a health care company specializing in respiratory devices such as CPAP machines, the pandemic forced customers to learn how to use the machines virtually—a complicated process that had previously required an in-person clinical interaction. Today, said Christen Chavez, ResMed's vice president of product marketing, during COVID in some markets 50% of therapy setup was done virtually. Yet that number tailed off as the pandemic slowed, not because the instruction was unclear but because the follow-on was complicated and uncoordinated. "Something that is virtual should be more convenient, but it can actually take more work for the patient and care provider," she said. For example, the care provider must deal with the complexity of communications and messaging platforms and find out which service a patient will use—whether it's Zoom or another platform.

This realization has shifted ResMed's investment focus to more of what Chavez called "virtual pathways." She said, "We realized the connectedness between these types of solutions that we're developing is so important ... potentially more important than the actual value of [an individual] point solution." It turns out that there's a lot more to the virtual customer experience than simply the interaction with the product. If the system doesn't support the patient experience, it won't work—which in ResMed's case can have serious health implications.

As a result, said Chavez, ResMed is considering how care providers "think about something that used to be a single visit or encounter with a patient and spreading that out into an onboarding experience"—providing information before the visit and support after they leave. At the same time, ResMed is serving patients in a more personalized way; they can choose whether to come into the clinic or use the online instruction modules. "There's been no negative impact on the level of patient service."

PERSONALIZATION AT SCALE

“Those first few moments of the pandemic ... it felt like there was a moment when we were all in that together,” said Thomas Ranese, former chief marketing officer of Uber and now a senior advisor at McKinsey. “I don’t think that moment lasted very long.”

After that brief period of unity early in the pandemic, technological improvements and political and societal shifts accelerated the fragmentation of the consumer. “The world has gotten more splintered, more divided, more fragmented, and so the idea of a new consumer has to be thought of in that same lens,” said Ranese. “As marketers, we have to think now a lot more about subsegments of customers and consumers ... in a much more complicated way.”

Technological improvements have made that segmentation easier to do. It is finally common for even a massive company to tailor its offerings online to a single customer and even to target increasingly small segments in person. Best Buy is undergoing what Polly Tracey, chief communications and public affairs officer at Best Buy Canada, called a “big shift in our mindset: Making everything look the same is no longer the best way to do business.” The company is currently piloting a hyperlocal approach to stores in the U.S., asking the question: “What do we need in this market: big stores, small stores, fulfillment options, and employment models? We try different small store formats in each market to create the perfect set of tools for that market. It’s geographic personalization.”

The same is true in the entertainment world, said CBS’ Subramanyam, where consumers fully expect to consume content however and whenever they want it. “There is a lot of power and a lot of agency in the hands of the customer,” she said. “From where we sit, it means making content available on every possible platform, as close to in real time as possible. So, we will have a show that’s dropping live on broadcast that’s also being streamed on Paramount+ and is being made available on demand.” Subramanyam added, “We’re saying, ‘Hey, I’m not going to tell you how to eat pad thai. I’m going to make pad thai available to you in all of these different ways.’ And you choose how you eat pad thai.”

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THERE IS A LOT OF POWER AND A LOT OF AGENCY IN THE HANDS OF THE CUSTOMER.

— Radha Subramanyam, President and Chief Research and Analytics Officer, CBS Corporation

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In early 2023, there was a massive amount of attention given to the dramatic improvement in generative **artificial intelligence**, as well as a lot of fear and handwringing about what it means for society. But from the standpoint of understanding the customer, most of the executives we spoke to see it as a huge positive. Procter & Gamble CEO Jon Moeller said that the technology is already cutting down innovation cycle times and will soon “inform the shopping experience.” He added, “It’s something that we embrace.”

AI is already having an impact on online customer service, said Soyoung Kang, CMO of beauty and skincare brand eos Products. “Where I’m interested in AI specifically is in the future evolution of generative AI and chatbots as a useful mechanism for marketing purposes because so much of the conversation that we have—the consumer engagement, audience engagement that we do, for example, on social media—is very manual.” She said, “Chatbots in the past were not particularly good at having a natural conversation, and that game is completely changing right now.”

Not everyone is convinced of the hype, however. Bob Eckert—former CEO of Mattel and a director of Amgen, Levi Strauss & Co., McDonald’s, and Uber—said he doesn’t see it as a “game changer” yet. He said, “I do see it as the next generation of efficiency when it comes to marketing and understanding our customers.”

STARVED FOR EXPERIENCES

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THE CONSUMERS CRAVE HUMAN INTERACTION MORE THAN THEY DID BEFORE. THERE'S MORE VALUE BEING PUT ON THAT. SO, IT'S IMPORTANT TO ... NOT COMMODITIZE YOUR PRODUCT. ... YOU'VE GOT TO MAKE SURE THE CUSTOMER FEELS VALUED AND [THAT THEY] MATTER.

— Raj Vennam, Chief Financial Officer, Darden

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As consumers, we all overindexed on home goods and other products during the pandemic, which made complete sense when we were looking at the same four walls all day. As expected, spending in that area has returned to more typical patterns. In retail, purchases as a share of wallet skyrocketed during the pandemic but then reverted to an expected growth rate of 4%-6% in 2023. Said Katherine Cullen, senior director of industry and consumer insights of the National Retail Federation, “We are seeing a reset to the overall rate of growth for our industry.”

But as daily lives have normalized, consumers' shifts away from owning stuff and more toward accumulating life experiences has only grown. “I think it is more about the experiences people are trying to make up for than the things they're trying to have in their lives from a material standpoint,” said Ranese. Despite the worrisome economic news, “consumers are still ... trying to enjoy the life they didn't have for a couple of years during COVID,” he said, noting that Uber's best quarter in history was the first quarter of 2023.

The airline business is one huge beneficiary of the shift to experiences with demand for travel soaring. But the customer focus has changed, said Hawaiian Airlines SVP and Chief Marketing and Communications Officer Avi Mannis, pivoting away from what once seemed like a permanent emphasis on health and sanitation to one that highlights the travel experience itself. Although cleanliness continues to be important, “it's not the same kind of driver of consumer choice,” he said. “What people care about are the things people have always cared about: getting where they're going safely, being on time, being comfortable and entertained, and having their bags arrive when they do.”

Mannis noted that people are now far more likely to combine a work trip with a vacation, given their ability to work remotely, and that this, too, feeds into the types of experiences he is working to deliver. Hawaiian Airlines is now experimenting with different kinds of more premium, leisure-focused experiences beginning on arrival to the airport, including things like a tasting menu in the lounge for those willing to pay.

For Darden, the increased focus on experiences means an emphasis on service. “The consumers crave human interaction more than they did before,” said Vennam. “There's more value being put on that. So, it's important to ... not commoditize your product. ... You've got to make sure the customer feels valued and [that they] matter.” He added, “How are you making them feel special?” Digital ease is key, but so is the human touch—especially in volatile sectors like investing. Barker from TIAA underscored that the company's customer seeks reassurance. “When confidence is what you're solving for, not everything can be solved digitally. In some deeply personal and high consequence contexts, customers may need the power of digital and human solutions.”

One major shift during the pandemic was the prioritization of employees, initially because they were potentially risking their lives to be at work and then due to the shortage of qualified talent. Although recent waves of layoffs may suggest a reversion to the pre-pandemic norm, many companies remain firmly convinced of the connection between happy employees and happy customers. Virginia Tenpenny, former chief global social impact officer at Starbucks, said that employee experience is the essence of customer experience, and the data supports this. “The emotional connection that people have ... [in] a positive experience with the barista, that has direct impact to the bottom line,” she said. “Stores that have very high turnover have lower customer scores.”

Understanding that fact means it’s more critical than ever to support employees as they recover from the past few years because their emotional health will rub off on customers. Even as many people order from pickup-only stores for convenience, Starbucks is investing in deepening the connection between employees and customers at their in-person locations. “It’s the right thing to do,” said Tenpenny, “and it’s essential to the business.”

WELLNESS WINS

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PEOPLE WANTED HEALTHY OPTIONS BEFORE, BUT IT JUST DIDN'T SELL.

— Virginia Tenpenny, Former Chief Global Social Impact Officer, Starbucks

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The trend toward consumers valuing health and wellness grew during the pandemic—naturally, given that COVID-19 was a health crisis. But this trend has increased to an unprecedented level, said a C-suite executive at one of the fastest growing wellness and personal care companies in the world. “Especially younger consumers prioritize wellness more than almost anything else.” Discussing a specialty bath products brand, the executive said that engagement has soared. “There’s a huge amount of earned media and organic PR we get from this brand because it’s so top of mind for consumers.”

Healthy menu options, which used to be marketed separately for a small group of customers, are simply becoming a normal part of many menus. For example, Starbucks’ Impossible Breakfast Sandwich has helped the company finally break through the challenge it has had with food sales. “People wanted healthy options before, but it just didn’t sell,” said Tenpenny. “Now we have a product that is relevant to all customers.”

Contactless payment is a perfect example of a trend accelerated by the desire for wellness (or rather, to lessen the risk of contagion). Although the health rationale is no longer as relevant, digital payments have continued to soar because the customer experience is so positive. “Tap to pay has exploded around the world,” said Romina Seltzer, head of product and innovation for Visa Latin America and the Caribbean. In her region, tap to pay has gone from virtually no penetration four years ago to 50% of Visa’s payments today and 72% globally (face to face transactions, excluding Russia and USA). “The better user experience wins.” Ease of use is also leading to a huge increase in what Seltzer called “fast payments”—Venmo and the like. Visa Direct saw a 39% increase in payments in 2022 (excluding Russia), and Seltzer expects this to build.

A not-so-obvious connection to the wellness trend is the surprising surge in pet ownership and spending on pets. Weteney Joseph, EVP and chief financial officer at Zoetis, said that in one study, 95 percent of pet owners globally consider their pet a part of their family, and 98 percent reported that they have personally experienced health benefits from having a pet in their lives. Pet ownership and spending exploded during the pandemic and has not gone away, not only in Western economies but in all parts of the world. “There’s the influence that Western cultures have on a lot of these emerging markets,” said Joseph, adding that people around the world are increasingly seeing pets as family members. “There’s also this element of people living in more urban spaces, waiting longer before they have children,” he said. “The slower pace of growth of the human population is almost replaced by ... pets.”



zoetis

CASE STUDY: THE PRIMACY OF THE PET

Just 10 years ago, animal health company Zoetis used to do two-thirds of its business supporting farm animals and one-third for pets, and today the reverse is true based on increased pet adoptions and innovative new products. Although the pace of adoptions has slowed as people have returned to more normal work behaviors, the focus on the pet—and its health—has not changed. “There’s been this trend over time where the humanization ... of pets is even more pronounced,” said Wetteny Joseph, EVP and chief financial officer. This is also a global trend. “[People] have a different view of what a pet means and what role it plays in their lives,” he said. Even as vet visits have come down since their height during the pandemic, he said, “What people are spending on a per-visit basis is up significantly.”

To address the growing demand for more products to improve a pet’s health, Zoetis has boosted its R&D spending to its highest level. Joseph cited a recent study Zoetis conducted in which people said they would maintain spending on their pet at the same rate, even if their budget decreased by 20%. Today, Zoetis’ dramatic shift to focus on pets is having a big effect on its innovations going forward.

ECONOMIC PRESSURES ARE MOUNTING

Which of the following factors has most impacted your customer-facing strategy since 2019?



N = 59

We asked our members which of five choices had the greatest impact on their customer-facing strategy; “economic pressures” was by far the dominant answer. And this is not going away, as bank failures and growing numbers of layoffs mean more pressure on the rapidly shrinking middle class. A C-suite executive at a leading global consumer goods company foresees the consumer continuing to struggle through the beginning of 2024. Knowing that people are trading down, the executive is focused on engineering absolute value toward the lower end. One approach is to reduce the number of SKUs to try to be more intentional about what the customer will choose during a downturn. “Placing fewer but bigger bets is really important,” the executive said. “There’s more risk in having 100 things versus 10 things.” Steve James, chief marketing officer at Fannie Mae, observed similarly cautious behavior in home buying. He said, “As wage growth hasn’t kept up with inflation, the consumer is more financially challenged than they’ve ever been.”

Until very recently, there was no indication that those with a lot of disposable income were starting to tap the brakes, accelerating a post-pandemic trend called premiumization—or the belief that making different “classes” of products available at various prices is a smart customer strategy. It also means focusing on the top-earning segment of the market. This is happening at Beam Suntory, the maker of Jim Beam and other liquor brands. “In the world of spirits, we find that consumers are willing to pay for brands that they feel are worth it—brands that have a strong connection to and that offer an incredible experience at every touchpoint,” said Ivan Hidalgo, VP of North America marketing for Beam Suntory. “This growth mostly resides in the premium segment of our portfolio, and we expect it to continue to grow.”

Yet even the high-end customer is suddenly feeling a bit of a squeeze, according to the National Retail Federation. “We are starting to see high-income spenders make tradeoffs,” said NRF Vice President of Retail and Consumer Insights Katherine Cullen. “While they still feel comfortable spending, like mid-income consumers, they are considering ways to balance their budgets and may be pulling back in some areas in order to compensate for higher costs elsewhere.”

ESG UNDER PRESSURE

In the years following the murder of George Floyd, nearly every business took a hard look at the diversity in its ranks and took some action to address the disparities. That led to many businesses finding themselves caught between political decisions that affected their customers, feeling compelled to speak out even when it risked impacting sales. It was a new—and uncomfortable—position for many business leaders, who were used to staying above the political fray. At the same time, the growing emphasis on the employee gave the corporate social responsibility movement a boost, making the themes of purpose, sustainability, and diversity board-level topics for most large companies.

Now, though, as the economy slows and a political backlash against many of the cultural and social changes of the past decade grows, some businesses are reporting fatigue in the ESG space and noting that customers seem less enthusiastic about the concept of doing well by doing good than they did even a year ago. Is this about burnout, a decision to put their wallets over their hearts, or something else entirely?

“For younger consumers ... purpose isn’t a buzzword,” said a C-suite executive at a wellness and personal care company. “They want it and expect it, but what is interesting is they don’t necessarily want to pay for it. They still want efficacy; they still want value, and then they want purpose—in that order.” That puts businesses in a difficult spot, the C-suite executive said, but cautioned that this doesn’t mean it’s time to abandon ESG. “[Customers] might not have a lot of money, so they expect their brands to do some of this work for them by giving back to communities or doing more sustainable packaging.” It may cost more to do that, but the downside of not doing it may be higher, the executive said.

Kang, CMO of eos, a beauty and skin care company, agreed that this is not the time to give up, despite the financial pressures. “The possibility that ESG and corporate social responsibility goes lower in the priority list as a result of dealing with things that feel more existential to leaders—that’s ... a real risk.” She said, “I do believe that we, as leaders across all organizations, really need to start to embrace it as fundamental. ... The issues that we’re trying to solve through ESG initiatives, they’re not going away.” Kang said eos is maintaining its investments in its social responsibility programs. “Those programs are really fundamental to how we build a long-term brand. You make these investments for the long haul.”

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I DO BELIEVE THAT WE, AS LEADERS ACROSS ALL ORGANIZATIONS, REALLY NEED TO START TO EMBRACE IT AS FUNDAMENTAL. ... THE ISSUES THAT WE’RE TRYING TO SOLVE THROUGH ESG INITIATIVES, THEY’RE NOT GOING AWAY.

— Soyoung Kang, Chief Marketing Officer, eos

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**BEST
BUY**

CASE STUDY: LEVERAGING SUSTAINABILITY AND VALUE

Why do people lease cars, but own all their other household technology? It's an area that's ripe for innovation, when you think about it. To appeal to younger consumers' desire to have the latest and greatest technology but also support sustainable practices, Best Buy Canada launched a subscription model experiment for laptops earlier this year. Said Polly Tracey, chief communications and public affairs officer, "This is about building a relationship with the customer. If technology is such a big part of your life, Best Buy becomes your tech partner."

The marketing emphasizes saying "goodbye to FOMO forever" and offers a cost below that of owning the laptop, the ability to trade in at the end of the term, and a promise to refurbish or recycle the old device. For now, customers must do their trade-ins in a store because it's an easier way to gather information. "Our advisors in stores are a massive part of the process; they tell us what customers want and what they want to sell," Tracey said. The company is also experimenting with online marketing, pushing information about the subscription to customers browsing for laptops. "We're very encouraged by the response—and uptake—by our customers and we're expanding the program even faster than our original plans."

Some companies have leaned in heavily to ESG and achieved good results. At Levi Strauss & Co., the "Buy Better, Wear Longer" campaign—which encourages consumers to "waste less" by spending more on Levi's—has been a huge hit. "It's been the most effective campaign in the recent history of Levi's," said Eckert. "[That] campaign has driven market share gains."

And at CBS, ensuring that programs reflect the diversity of society has become an expectation rather than a nice-to-have. "There has been ... no backlash from the perspective of seeing diversity on screen. We've only seen success," said Subramanyam. "If you ever inadvertently end up with a show or an idea that isn't naturally diverse, the consumer is pushing back. I get called up by middle America all the time, 'Hey, that's not what a friend group looks like anymore.'"

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– Images provided using Midjourney. (Mar 15, 2023). Prompt: “Gradients using warm colors and flowy shapes”

ABOUT

Founded in 2004, World 50 consists of private peer communities that enable CEOs, board directors, and C-level executives from globally respected organizations to discover better ideas, share valuable experiences and build relationships that make a lasting impact. The busiest officer-level executives and their most promising future leaders trust World 50 to facilitate collaboration, conversation, and counsel on the topics most crucial to leading, transforming, and growing modern enterprises.

World 50 members reside in more than 37 countries on six continents and are leaders at companies that average more than US\$31 billion in revenue. With the recent additions of G100, Procurement Leaders, and EHIR, World 50 has positioned itself to serve leaders across all senior leadership roles, functions and geographies.

Executive leadership insights found nowhere else.

One of the biggest value drivers of the World 50 membership is unrivaled access to practical insights and ideas from the world’s best business leaders. World 50 conducts tentpole research projects—such as The New Customer—to understand how executives are responding to trends and upheavals in today’s global business environment. The goal, as always, is to help members and their teams stay ahead.

World 50 content:

- Reflects the voice of senior-most executives who are living the role.
 - Finds a signal in the noise and focuses on the issues that matter most, now.
 - Helps the best leaders become better.
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We hope that you found this research useful and that some of the perspectives expressed by fellow members are helpful as you address these challenges. Please share your feedback with us, or ask further questions by contacting Info@thenewcustomer.com.