NEWS RELEASE

Independent Study Reveals Marketers Must Orient Around Customer Value to Win in The Era of AI

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A commissioned study, conducted on behalf of Zeta Global, finds that most organizations track customer lifetime value (CLV), but few apply it to their marketing strategies and tactics

NEW YORK--(BUSINESS WIRE)-- Zeta Global (NYSE: ZETA), the AI-powered marketing cloud, today published a Forrester Consulting Opportunity Snapshot, "**Marketers Must Shift Their Understanding of Customer Value to be Forward-Looking**." The study, which was completed in February 2024 and captured insights from customer engagement strategy decision-makers in the US and UK, was commissioned by Zeta to examine how marketers currently assess and apply CLV and identify the changes needed to foster a more predictive and holistic approach in the era of Generative AI.

The Forrester study revealed that most organizations track CLV, but very few use the key metric in setting strategy, making investment decisions, and personalizing experiences across the customer lifecycle. This disconnect points to a critical gap in how data is collected and leveraged to inform forward-looking decisions that drive customer engagement and business growth.

"This study highlights a fundamental problem with digital marketing as it has been practiced for the past 20 years: the slow movement of data leading to a KPI dashboard that is backward-looking," said David Steinberg, Co-founder, Chairman, and CEO of Zeta Global. "AI represents a new era in computing, and Generative AI will be the cornerstone of modern marketing strategies for those who can capitalize on data integrity, sophistication and speed. AI-powered models can shift CLV from the rear-view mirror to the windshield, empowering marketers to deliver more relevant consumer experiences and drive greater returns from their marketing investments."

The findings emphasize that the future of effective marketing lies in the ability to predict and shape consumer attitudes.

Key findings from the study include:

- Few apply CLV metrics to customer strategy: Though 81% of respondents' organizations have the ability to track CLV, only 37% actively apply it to their strategy and just 14% are maximizing the value of their CLV metrics in marketing investment and execution.
- CLV and profit margin metrics are expected to increase in priority: Organizations are increasingly prioritizing CLV and revenue per customer ahead of transactional vanity metrics that only provide a historic snapshot of customer behavior.
- Technology integration and alignment is essential: 83% of respondents point to the importance of Martech ecosystem alignment to drive business success.
- Departmental alignment is also imperative: On average, only 19% of respondents said their organization is fully aligned across functions. Marketers were least aligned with data science and analytics departments.
- Marketing must focus on predictive value to maximize ROI and optimize experiences: 53% of respondents anticipate that marketing will have more influence on business strategy, and be more effective, as more businesses apply forward-looking profit metrics to their customer value strategy.

Download the Full Study Here

About Zeta Global

Zeta Global (NYSE: ZETA) is the AI-Powered Marketing Cloud that leverages advanced artificial intelligence (AI) and trillions of consumer signals to make it easier for marketers to acquire, grow, and retain customers more efficiently. Through the Zeta Marketing Platform (ZMP), our vision is to make sophisticated marketing simple by unifying identity, intelligence, and omnichannel activation into a single platform – powered by one of the industry's largest proprietary databases and AI. Our enterprise customers across multiple verticals are empowered to personalize experiences with consumers at an individual level across every channel, delivering better results for marketing programs. Zeta was founded in 2007 by David A. Steinberg and John Sculley and is headquartered in New York City with offices around the world. To learn more, go to **www.zetaglobal.com**.

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