Quarterly Digital Intelligence Briefing: Delivering Digital Experiences

In association with Adobe
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1. Foreword by Adobe

This Delivering Digital Experiences briefing from Econsultancy, published in partnership with Adobe, explores the increasingly central role of web content management as a key building block for delivering personalized, multichannel experiences.

This research explores similar themes to last year’s Digital Intelligence Briefing entitled ‘From Content Management to Customer Experience’, with some fascinating trend data emerging.

As was the case in 2013, this year’s report is based on a survey of around 1,000 respondents across marketing, web development and IT functions, an impressively high response rate which shows how seriously organizations are continuing to take this aspect of their business. Building engaging experiences across all digital channels that attract customers with targeted content is becoming top-of-mind for all marketers.

There are three particularly notable findings from this research which I wanted to highlight:

Firstly, it is encouraging to see organizations making headway with mobile, with significantly fewer companies than last year agreeing that ‘delivering optimal experiences across all screens and devices’ is a major challenge (60% this year compared to 70% last year). Many organizations have made great strides in creating a more mobile-friendly digital experience, although this remains an ongoing and complex challenge even for those who have tackled this head-on.

Secondly, it is really clear that companies are more closely aligning their content marketing and experience-driven commerce capabilities, with more companies than last year for example reporting that a business objective for CMS is ‘driving sales’ (60% compared to 53% last year).

There is a clear focus on experience-driven commerce which maximizes conversions and revenues through more effective merchandising. Central to this is personalization of content as a way of delivering engaging multichannel experiences that increase conversions and build brand loyalty.

Thirdly, there is increased recognition of the importance of a content management system which integrates with other digital marketing technologies and platforms, from analytics and CRM to multichannel management and social media tools.

The ability for brands to deliver personalized digital experiences across channels and devices has never been more important. With Adobe Experience Manager (AEM) as a key part of the Adobe Marketing Cloud, we believe we offer the most complete solution for those who want to build their digital marketing and commerce capabilities on the most solid of foundations with the best chance of successful integration with other tools and technologies.

We would like to thank those who took the survey, and look forward to hearing whether the information provided below matches your own experiences.

Mark Phibbs
Vice President, EMEA Marketing
Adobe

2. Digital differentiation

Occasionally as consumers we have those wonderful moments when a brand really delivers a fantastic online experience which make us think: “Wow, that was really slick, I like what this company did here”.

This might happen when we find it remarkably easy to carry out a task, whether finding and checking some information via our smartphone or filling in a form which we’d safely assumed would be a fairly arduous and fiddly process.

As part of this content management and digital experience survey of almost 1,000 marketers, web developers and IT professionals², we asked respondents whether they believed their businesses were differentiating through the digital experience.

It is clear from Figure 1 below that those who claim to be doing so are in the minority, representing just under a third of the client-side sample (31%), compared to 35% who are neutral and 34% who disagree.

Whether companies are actually able to offer a stand-out digital experience or are still just aspiring to do so, technology used for organizing and managing a range of content types and creative assets needs to be fit for purpose. So it is a cause for concern that the proportion of respondents who agree that their content management system ‘facilitates a brand-enhancing experience’ has decreased from 38% last year to 31% this year (Figure 2).

Company respondents
Figure 1: ‘The digital experience is how we differentiate as a business’

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Respondents: 315

² See Appendix for profile of survey respondents
Company respondents

Figure 2: ‘Our CMS facilitates a brand-enhancing digital presence’

- Agree • Neutral • Disagree

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Respondents 2014: 318
Respondents 2013: 399

**Challenges around digital experience management**

“Defining our digital experience expectations and ensuring we have the correct expertise to deliver against this.”

“Separating reality from fantasy in business culture.”

Company respondents

**Challenges around digital experience management**

“Considering the end-to-end multichannel experience and the requirements for customers to have a seamless experience across them all.”

“The biggest challenge we have is to shift our clients’ perception so that they realize the digital UX is the brand experience and the first touchpoint for many customers.”

Agency respondents
Figure 3 below shows a number of business objectives and the proportion of respondents who believe that a CMS should help to deliver against them.

As was the case last year (Figure 4), the objectives most commonly cited are ‘improving user engagement and customer engagement’ and ‘building the brand through positive experiences’.

There is still a massive gap in the capabilities of content management systems when judged against these and other objectives. Sadly, since last year’s survey, there is no evidence of this gap being closed which suggests that many companies are having to make do with sub-standard content management systems.

Company respondents
Figure 3: CMS business objectives and how systems rate
Company respondents – 2013 data for comparison
Figure 4: CMS business objectives and how systems rate

- % of companies mentioning business objectives
- % of companies rating their CMS as good for helping to deliver against these objectives

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Respondents: 463
3. Cross-pollination of content and commerce

Ecommerce and content have been historically segregated, particularly because they fell under the remit of two teams that operated in silos and rarely collaborated. However, as customer engagement demands increased, we’ve started to witness more overlap and integration between the two, particularly aided by the rise of customer experience platforms. In the last few months, a recurring theme for companies has been the need to provide a seamless experience where content and commerce intertwine.

Although companies are increasingly recognizing the importance of lacing together content and commerce to provide an integrated experience, content and commerce segregation is unfortunately still commonplace. However, there are encouraging signs that this is gradually changing.

Producing high quality content can certainly help build trust, provide context and therefore improve financial KPIs. Customers no longer expect a purely transactional experience in the context of their online shopping. Content that is tightly aligned with their product and lifestyle needs can play a supporting role throughout the ecommerce journey.

Company respondents
Figure 5: Which of the following business goals does (or should) content management help you to meet?

As was the case last year, engagement and experience are top-of-mind for digital professionals. An overwhelming 87% of organizations surveyed pointed to ‘improving user engagement and customer engagement’ as a key business objective that content management ‘does or should’ help
them to meet, while a similar proportion (80%, up by 2% since last year) cited ‘building the brand through positive experiences’.

While this year’s survey shows that content management is still about digital experience and brand building, there’s more focus on financial objectives, particularly around the use of content for commerce. Three in five organizations now cite ‘driving sales’ as a key business objective for content management, an increase of seven percentage points since last year.

It’s also worth noting that there’s significantly less focus on ‘reducing costs’, with just over a quarter of respondents citing this (down from 43% in 2013).

As might be expected, a sector comparison revealed that the charity, travel and financial sectors are more likely to focus on improving user or customer engagement, while the retail and media sectors are more focused on driving sales.

**Company respondents – sector comparison**

| Table 1: Which of the following business goals does (or should) content management help you to meet? |
|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|-------------------------------------------------|
| Improving user engagement and customer engagement | Building the brand through positive experiences | Driving sales | Extending reach | Driving demand | Reducing costs | Other |
| **Charities, Government and Non Profit** | 93% | 76% | 40% | 57% | 26% | 38% | 2% |
| **Financial Services** | 86% | 89% | 66% | 57% | 41% | 34% | 2% |
| **Media** | 78% | 83% | 74% | 61% | 74% | 30% | 4% |
| **Professional Services** | 72% | 83% | 59% | 59% | 48% | 17% | 3% |
| **Retail** | 83% | 72% | 77% | 40% | 36% | 19% | 2% |
| **Travel & Leisure** | 91% | 77% | 64% | 59% | 41% | 23% | 0% |

Marketing (69%, up from 66% in 2013) is still the department which is most commonly responsible for content management activity. Interestingly, the proportion of organizations saying that ecommerce teams own content management has increased by 10% since last year’s survey. Conversely, web development and IT have seen a decline of 8% and 6% respectively.

Companies in the retail sector are around twice as likely as their peers in other sectors to have ecommerce teams owning their content management activity (**Table 2**).

The increase has been even more significant on the supply side (**Figure 7**), with half (49%, up from 34% in 2013) of agencies saying that ecommerce teams are the ones to hold this responsibility.
Company respondents

Figure 6: Which business departments have responsibility for content management activity?

![Bar chart showing departmental responsibility for content management activity]

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Respondents 2014: 308
Respondents 2013: 401

Company respondents – sector comparison

Table 2: Which business departments have responsibility for content management activity?

<table>
<thead>
<tr>
<th></th>
<th>Marketing</th>
<th>Ecommerce or digital team</th>
<th>Web development</th>
<th>IT</th>
<th>Customer experience team</th>
<th>Customer service / support</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charities, Government and Non Profit</td>
<td>60%</td>
<td>36%</td>
<td>19%</td>
<td>7%</td>
<td>10%</td>
<td>14%</td>
<td>26%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>69%</td>
<td>38%</td>
<td>26%</td>
<td>17%</td>
<td>14%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Media</td>
<td>68%</td>
<td>27%</td>
<td>41%</td>
<td>27%</td>
<td>18%</td>
<td>14%</td>
<td>27%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>82%</td>
<td>29%</td>
<td>18%</td>
<td>32%</td>
<td>36%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Retail</td>
<td>59%</td>
<td>78%</td>
<td>15%</td>
<td>15%</td>
<td>11%</td>
<td>13%</td>
<td>0%</td>
</tr>
<tr>
<td>Travel &amp; Leisure</td>
<td>76%</td>
<td>48%</td>
<td>19%</td>
<td>24%</td>
<td>19%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>
Agency respondents

Figure 7: Which business departments have responsibility for content management activity?

Content-related challenges around digital experience management

“Organizational challenges of approvals and ownership of content and configuration of it across the site.”

“Switching from a devolved content production model to a centralized one, bucking the trend of recent years in the other direction.”

“Management of digital properties and assets housed outside the CMS.”

“Generating a regular supply of quality content.”

Company respondents

Content-related challenges around digital experience management

“Having to use devolved amateur web authors from across wide areas of the business who do not have sufficient digital skills.”

Agency respondents

While improved engagement continues to be the metric of choice, Figure 8 shows that more companies are judging content management success based on improved conversion rates. Over a third (38%) of organizations say this is the case, a significant increase from 30% in 2013. Additionally, the proportion of organizations not measuring ROI has slightly declined, from 20% to 17% this year.
Company respondents
Figure 8: How do you measure return on investment on your CMS?

- Improved engagement (e.g., more time on site, page views, reduced bounce rates)
- Improved conversion rates
- Increased web traffic
- Increased site performance
- Shortened time from content creation to publishing
- Reduced IT / support costs
- Higher customer satisfaction
- Increased business automation / efficiency
- We don’t measure ROI
- Higher average order value
- Other
- Don’t know

Respondents 2014: 310
Respondents 2013: 404
4. Integration of CMS is key

In a commercial environment where increasing value is being placed on an organization’s ability to use their content in a variety of ways and on multiple platforms, it is not surprising that the integration of CMS a top priority for businesses.

Nearly a third of company respondents (31%) deem ‘ease of integration with other parts of the business’ to be among the three key criteria when accessing a CMS, a 5% increase from 2013. In comparison, while ‘ease of use’ (41%) and ‘content authoring and management capabilities’ (34%) are still key criteria, these appear to have become marginally less significant in the last 12 months with decreases of 2% and 9% respectively.

Company respondents
Figure 9: What are the most important criteria for your organization when assessing a CMS?

Note: Respondents could select up to three options. ‘Hosted service’ is a new option for this year’s survey.
The emphasis on integration is underscored by the results illustrated in figure 10. With just a few exceptions, companies are seeing the seamless integration of CMS with other technology as more of a necessity than last year. The reality is, without the capabilities that come from an integrated and cohesive approach to managing content, brands will increasing struggle to resonate with consumers.

Company respondents

Figure 10: Proportion of companies rating seamless integration of CMS with the following types of digital marketing platforms or technology as ‘very important’

<table>
<thead>
<tr>
<th>Service</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytics</td>
<td>64%</td>
<td>72%</td>
</tr>
<tr>
<td>Personalization</td>
<td>51%</td>
<td>53%</td>
</tr>
<tr>
<td>CRM</td>
<td>42%</td>
<td>51%</td>
</tr>
<tr>
<td>Digital asset management</td>
<td>50%</td>
<td>49%</td>
</tr>
<tr>
<td>Ecommerce platform</td>
<td>38%</td>
<td>47%</td>
</tr>
<tr>
<td>Multichannel campaign management</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>A/B and multivariate testing</td>
<td>32%</td>
<td>41%</td>
</tr>
<tr>
<td>On-site social media management / community tools (e.g. ratings and reviews, forums)</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>Off-site social media management (e.g. Facebook, Twitter)</td>
<td>29%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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The role of content in the age of the customer is to progress the brand narrative in a relevant and meaningful way for any given customer. This makes consumer information held in other marketing technologies and the ability to refine messaging essential for producers of owned media concerned with how consumers navigate the customer journey.

The significant upticks in companies rating the seamless integration of CRM (+9%), A/B and multivariate testing (+9%) and multichannel campaign management (+7%) with CMS as ‘very important’ illustrates just how organizations will have to change in order to remain competitive over time. However, despite the fact that companies appear to be more aware of the need for more CMS integration, their organizational context seems to relay a different story.
While the appreciation of the need for the integration of CMS with other marketing technologies has increased on the whole, the ability of respondents to integrate those platforms has decreased almost as much.

In an eye-opening comparison, only half the number of companies that stated that the integration of CMS with analytics was ‘very important’ rated their ability in this respect as ‘excellent’ or ‘good’ (72% vs 36%). In addition to this, significantly fewer companies than last year positively rate their ability to integrate CMS with four particular technologies, namely DAM (-8%), personalization (-8%), on-site social media management (-8%) and off-site social media management (-6%).

Company respondents

Figure 11: Proportion of companies rating the ability of their current CMS to integrate with digital platforms and technologies as ‘excellent’ or ‘good’

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Respondents 2014: 351
Respondents 2013: 431

The disparity between the rated importance and the ability to integrate technology platforms with a CMS is a cause for concern, but not without reason. The results illustrated in figure 12 suggest that the issue is more than just technological.

While marketers recognize the need for the integration of the CMS, the rest of the organization is often yet to be convinced. The most common barrier to successfully implementing a CMS is the ‘lack of integration with the rest of the business’ (43%), which is up eight percentage points since last year.
Challenges around digital experience management – lack of integration

“Finding a tool that enables a single customer viewpoint across all channels with an integrated CRM system. We’re close but I don’t think we have the complete solution.”

“Lack of efficient products that work together seamlessly with other products means there’s limited integration between products.”

“Multiple legacy platforms, fragmented publishing model, no clear ownership.”

“There’s no integration between social and web content teams at the platform level for content calendar. No integration with EMS or marketing automation for email content.”

Company respondents

Challenges around digital experience management – lack of integration

“There are many legacy systems that need to be stitched together.”

Agency respondents

Company respondents

Figure 12: What are the greatest barriers to successfully implementing a CMS?

- CMS technology limitations: 36% (2014), 37% (2013)
- Poor alignment with business needs: 27% (2014), 29% (2013)
- Lack of investment: 36% (2014), 29% (2013)
- Changing business needs: 25% (2014), 25% (2013)
- Project management issues: 23% (2014), 22% (2013)
- Poor implementation by third party: 19% (2014), 17% (2013)
- CMS too difficult to use: 18% (2014), 16% (2013)
- CMS not deployed widely enough: 8% (2014), 7% (2013)
- Conflict between vendor and third party doing implementation: 9% (2014), 5% (2013)
- Problems with different languages: 7% (2014), 6% (2013)
- Other: 5% (2014), 5% (2013)

Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Respondents 2014: 308
Respondents 2013: 395

Note: Respondents could select up to three options.
Although 37% of respondents acknowledged the limitation of CMS technology, a slightly smaller proportion of companies cited ‘poor alignment with business needs’ as a major barrier to CMS implementation (36%). The emergence of integration and alignment issues when implementing a CMS is symptomatic of organizations still operating with little, if any cohesion.

It is clear that in order to successfully implement, manage and maximize a CMS, integration is critical at every level of the business. Content’s effectiveness can be a key point of differentiation, but only if it is embraced through the organization. This requires businesses to remove unnecessary organizational silos, align content with business goals and find tangible ways to measure success.

| Challenges around digital experience management – barriers to implementing a CMS |
| “It’s not the implementation that’s generally the problem, it is the ongoing investment in the CMS to ensure it evolves to meet new ways to deliver digital content. And the debate around operational versus investment spend. I’ve seen this issue across two big corporations now.” |
| “Marketing look at it from a customer experience angle, while IT look at it from an internal systems and process point of view – the two are not always compatible.” |
| Company respondents |

| Challenges around digital experience management – barriers to implementing a CMS |
| “Costs to implement far exceed original expectations. Customization to specific needs not anticipated; ‘we can do that’ promises from vendors require massive investments in time and money.” |
| “Integrating with external client systems is very complex – often their infrastructure is not as sufficiently developed as the CMS and we end up working backwards.” |
| Agency respondents |
5. Apps become focus as companies tackle on-going mobile challenge

Mobile has been experiencing tremendous growth in the last few years and, in some organizations, has become a standard component of their marketing efforts. However, those that are tackling mobile optimization head-on are few and far between. Separate research conducted by Econsultancy and Adobe³ revealed that just over a third (36%) of companies currently have a mobile strategy that looks forward at least 12 months, roughly the same number that have budget allocated for mobile experimentation.

This content management survey shows that while companies are getting better at adapting to the multi-screen world, over half (57%) indicate they aren’t mobile-first.

Last year, ‘delivering optimal experiences across all screens and devices’ emerged as a major challenge for 70% of organizations surveyed. While there has been a significant reduction in those citing this as a challenge (down to 60%), there’s only been a marginal increase in those who consider themselves as ‘mobile-first organizations’.

Company respondents
Figure 13: Mobile is becoming less of a challenge though ‘mobile-first’ companies still few are far between

Figure 14 shows the deficiencies of content management systems as perceived by responding organizations. Mobile website functionality and responsive design are still top of the wishlist for features respondents would like to add, but this is a key feature for significantly fewer organizations than last year. Only a fifth (compared to a third last year) would add this to their CMS ‘right now’, with agency findings (Figure 15) painting a similar picture. Mobile app support is another feature that fewer companies would add to their CMS, with only 1% of respondents mentioning it.

This is probably because mobile functionality is becoming a standard feature, rather than something that only a handful of platforms offer.

Company respondents
Figure 14: If you could add one feature to your CMS right now, what would it be?

<table>
<thead>
<tr>
<th>Feature</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile website / responsive design</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>Targeting / segmentation</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Campaign management</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Social media / community management</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Automatic landing page generation</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Digital asset management</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Cloud scalability</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Content marketing calendars</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Translation support</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Mobile app support</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Note: ‘Automatic landing page generation’, ‘content marketing calendars’ and ‘translation support’ are new options for this year’s survey.
Agency respondents

Figure 15: If your clients could add one feature to their CMS right now, what would it be?

- Targeting / segmentation: 17% (2013), 24% (2014)
- Mobile website / responsive design: 17% (2013), 24% (2014)
- Social media / community management: 13% (2013), 11% (2014)
- Campaign management: 10% (2013), 13% (2014)
- Automatic landing page generation: 9% (2013), 9% (2014)
- Mobile app support: 8% (2013), 8% (2014)
- Digital asset management: 6% (2013), 5% (2014)
- Cloud scalability: 7% (2013), 4% (2014)
- Translation support: 3% (2013), 3% (2014)
- Content marketing calendars: 3% (2013), 3% (2014)
- Other: 3% (2013), 4% (2014)

Note: ‘Automatic landing page generation’, ‘content marketing calendars’ and ‘translation support’ are new options for this year’s survey.

According to Gartner, mobile apps are set to become one of the most popular channels, estimated to drive revenues of more than $77 billion by 2017. Engagement and time spent with mobile apps is also on the rise, according to Adobe Digital Index data. Consumers use the average smartphone apps more than twice as often as they visit the typical mobile website. All combined, the app usage outpaces mobile web visits by an average of 100 minutes per month.

The Adobe 2014 Digital Marketing Optimization Survey revealed that most marketers recognize the importance of focusing on mobile to support cross-channel efforts. It comes as no surprise then that the most highly ranked criterion for selecting solutions for mobile apps is ‘harmony with rest of the digital experience’, with almost half (47%) of companies citing this.

More than half (56%) of agencies surveyed say that ‘supporting multiple mobile platforms’ is a key criterion for their clients, compared to 43% of companies themselves. ‘Integrated app analytics’ is a key criterion for only a quarter of responding organizations.
Figure 16: Main criteria for selecting solutions for mobile apps

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Company Respondents</th>
<th>Agency Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harmony with rest of the digital experience</td>
<td>47%</td>
<td>44%</td>
</tr>
<tr>
<td>Supporting multiple mobile platforms (Android, iOS, Windows Phone, etc.)</td>
<td>43%</td>
<td>56%</td>
</tr>
<tr>
<td>Allowing easier marketing contributions to apps content</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Integrated app analytics</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Updating installed apps easily</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>Controlling cost via re-use of mobile components and assets</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Managing larger portfolio of apps</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Beta testing apps with key stakeholders</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Note: Respondents could select up to three options. This is a new question for the 2014 survey, so there is no trend data.
6. Social unlocks door to personalization

The pursuit of likes, retweets and +1s has traditionally been a primary focus for marketers when it comes to social media. However, with many companies struggling to measure the ROI of their social media activity, marketers are under increasing pressure to derive more than just social advocacy from their ‘fans’. Yet, for publishers and producers of content the opposite may be taking place. Social is taking on greater importance, with a growing number of organizations recognizing and capitalizing on its ability to be a better driver of traffic than traditional SEO.4

Despite this, marketers are seemingly less able than last year to use their CMS to promote social media activity. Less than half of respondents say their content management systems enable ‘social plug-ins to the website’ (49%) and there has been an 8% decrease in the proportion of companies able to facilitate user-generated content using their CMS. Meanwhile nearly a third of companies (32%) say their CMS doesn’t facilitate any social activity, up from just over a quarter (27%) last year.

Company respondents
Figure 17: Which of the following does your CMS enable to promote social media activity?

![Social Media Activity Options](https://econsultancy.com/blog/64850-the-buzzfeed-way-examples-of-shareable-native-advertising)
Although CMS deficiencies in the context of social are hampering many companies’ social media activities, a growing number of marketers see potential in using data from social profiles to create personalized content.

The thinking of such marketers is clear; in order to give personalized experiences to consumers whose interests can be highly individual, serving content based on broad segments will become increasingly inefficient. However, personalized content based on a user’s own social data should enhance the ability of marketers to create more relevant, compelling experiences.

Company respondents

Figure 18: What built-in social media tool would you most like your CMS to have which it doesn’t currently have?

![Chart showing the preferences of respondents for social media tools in 2013 and 2014.]

Based on this research, marketers are more likely to be on the outside looking in when it comes to personalized content based on social profiles. Nearly a third (32%) of respondents indicated their interest for a built-in CMS tool which facilitated this, while only 16% use a CMS which has the feature.

A step towards organizations improving their ability to deliver relevant narratives to customers is to have better integration between CMS and social. However this report suggests advances in this area are, at best, slow.

Close to two-thirds of responding marketers (63%) have found it difficult managing and measuring social media activity within the CMS over the past two years. With the proportion of companies rating the ability of their CMS to integrate with off-site social media activity ‘excellent’ or ‘good’ (Figure 11) decreasing from 25% to 19%, it is clear there is significant room for improvement.
The relationship with social and content, whilst already strong, should strengthen and mature going forward. Instead of using social as a channel for communication and advocating the brand, businesses should work towards using social to develop their products and experiences. As marketers strive towards making content more personalized and organizations attempt to derive value from social, there is a clear opportunity both to solve issues and create compelling digital experiences.

Company respondents
Figure 19: ‘Managing and measuring social media activity within our CMS is difficult’

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<table>
<thead>
<tr>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree</td>
<td>Neutral</td>
</tr>
<tr>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>14%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Respondents 2014: 316
Respondents 2013: 394
7. Technology for an easier life

It was seen earlier in the report (Figure 9) that ‘ease of use’ is the single most important criterion for those choosing a CMS for their organization. An alarming finding from this year’s research is that respondents this year are significantly less likely to agree that their ‘CMS makes life easy for webmasters and business users’.

As companies put more emphasis on owned media and content marketing, it may be that marketers and ecommerce professionals are becoming more clued up about the deficiencies of their tech platform, and more likely to have that nagging feeling that their technology is more of a hindrance than a solution.

In a world where ‘agile marketing’ is becoming a mantra for many organizations, it is becoming increasingly noticeable when there are technical shackles impeding the ability to respond to events quickly, whether updating a CMS or locating and deploying the right digital assets on the right channel.

A case in point is that half of the respondents to last year’s survey said they expected the majority of their content editors and authors to be able to manage content via touch-enabled devices within a year. That view now seems widely optimistic, with only 37% now thinking that this will be the case by the middle of 2015.

Company respondents
Figure 20: ‘Our CMS makes life easy for our webmasters and business users’ – agree or disagree
Company respondents
Figure 21: When do you expect the majority of your content editors and authors to be able to manage content via touch-enabled devices?

![Bar chart showing responses to the question of when majority of content editors and authors expect to manage content via touch-enabled devices.]

- **Within six months**: 17% (2013), 15% (2014)
- **Within a year**: 33% (2013), 22% (2014)
- **Within two years**: 28% (2013), 32% (2014)
- **Within five years**: 13% (2013), 24% (2014)
- **Never**: 9% (2013), 8% (2014)
8. Key requirements for DAM and forms solutions

Another area where ease of use is absolutely critical is for planning, production and distribution of digital assets. In this year’s survey, we added a question about the most important criteria for assessing a digital asset management (DAM) system, with respondents invited to check up to three options.

It can be seen that the most important factors for client-side respondents are ‘ease of use’ (41%), ‘ease of integration’ (39%) and ‘workflow management’ (37%).

Time-poor marketers need all the help available in ensuring that they can access assets such as images, videos and display ads, and re-use or re-purpose them across different touchpoints and platforms spanning an array of browsers, mobile and social. Collaboration with colleagues both in their teams and in other departments is also important, with the need for technology which makes sure the baton is transferred by the right team player at the right time (i.e. workflow management).

Figure 22: What are the most important criteria for your organization / clients when assessing a digital asset management system?

Note: Respondents could select up to three options.
This is a new question for the 2014 survey, so there is no trend data.
Marketers acknowledge the importance of all of the above being ‘easy’, while also pointing to the need for seamless integration across other systems. It is clear that digital professionals can no longer operate with CMS or DAM technology which operate in a silo. A case in point is the sought-after ability for a DAM to offer tagging capabilities to aid search marketing (highlighted by 35% of respondents), and also the ability to optimize images and video for different screen sizes and bandwidths (28%).

Security-related features are cited by 23% of respondents, with companies increasingly needing to take precautions around user access and licensing in order to protect their brands. This figure increases to 31% of larger companies, i.e. those with annual revenues of more than $1.7 billion.

As part of the quest to make it easier to facilitate sleeker digital experiences, businesses increasingly require technology which makes it straightforward to build and manage web and mobile forms.

Whilst arguably not among the most glamorous of digital-related topics, forms are becoming a more important part of the user experience as companies seek to migrate their services online as part of the drive to more digitally-available and cost-effective customer service.

As part of this research we asked respondents to indicate the most important criteria for assessing a forms portal solution, with the results shown in Figure 23 below.

**Figure 23: What are the most important criteria for your organization / clients when assessing a forms portal solution to improve complex forms transactions?**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Company Respondents</th>
<th>Agency Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Making form-filling easier on touch-screen devices</td>
<td>52%</td>
<td>49%</td>
</tr>
<tr>
<td>Harmony with rest of the digital experience</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Integrated analytics</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Adaptive and personalised forms and application documents</td>
<td>44%</td>
<td>48%</td>
</tr>
<tr>
<td>Ability to find the right forms</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Personal access to application status and filled forms</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Company respondents: 343  
Agency respondents: 257*

*Note: Respondents could select up to three options.  
This is a new question for the 2014 survey, so there is no trend data.*
It can be seen that there are four stand-out requirements for these solutions, namely ‘making form-filling easier on touch-screen devices’ (52% of client-side respondents), ‘harmony with the rest of the digital experience’ (48%), ‘integrated analytics’ (44%) and ‘adaptive, personalized forms and application documents’ (44%).

It can be seen that the client-side and supply-side respondents are very similarly aligned in terms of the relative emphasis placed on these criteria.
9. Appendix: Respondent Profiles

This Quarterly Digital Intelligence Briefing is based on an online survey of nearly 1,000 client-side and agency respondents, carried out in July and August 2014.

Figure 24: Which of the following best describes your company or role?

- 58% Client-side (part of an in-house team)
- 42% Agency / vendor / consultant

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Respondents: 975
9.1. **Department**

Marketers are increasingly taking ownership of content management activity and this shift is evidenced by the high proportion of marketers taking part in this survey, representing 61% (up from 47% in 2013) of a sample which also includes web development (9%), IT (6%) and editorial (4%).

Compared to last year, the proportion of respondents working in web development and IT teams has almost halved (15%, down from 29% in 2013).

**Company respondents**

**Figure 25: What department within your organization do you work in?**

![Department Graph]

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Respondents: 541
9.2. **Geography**

Just under half (48%) of respondents are based in the UK. A fifth (20%) of respondents are based in Europe (non-UK), 12% in Asia Pacific and 11% in North America. Other regions represented include Middle East, South America and Africa.

Figure 26: In which country/region are you (personally) based?
9.3. Business sector

Respondents work across a wide range of different industry sectors. The best represented sectors are retail (15%), financial services (14%) and charities, government and non-profit (13%).

Company respondents

Figure 27: In which business sector is your organization?

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>14%</td>
</tr>
<tr>
<td>Charities, Government and Non Profit</td>
<td>13%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>9%</td>
</tr>
<tr>
<td>Media</td>
<td>7%</td>
</tr>
<tr>
<td>Travel &amp; Leisure</td>
<td>7%</td>
</tr>
<tr>
<td>Technology</td>
<td>6%</td>
</tr>
<tr>
<td>Healthcare and Pharma</td>
<td>5%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4%</td>
</tr>
<tr>
<td>Consumer Goods</td>
<td>3%</td>
</tr>
<tr>
<td>Telecoms</td>
<td>2%</td>
</tr>
<tr>
<td>Automotive</td>
<td>2%</td>
</tr>
<tr>
<td>Gaming and Gambling</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
</tr>
</tbody>
</table>
9.4. Business focus

The chart below shows to what extent businesses are focused on B2B, B2C, or both. Just over a third of respondents (38%) are exclusively focused on B2C, while around a quarter (28%) are focused on both B2B and B2C.

Figure 28: Is your business focused more on B2B or B2C?
9.5. **Annual revenue**

The chart below shows the annual revenue of responding companies. At the upper end of the scale, half of company respondents have annual revenues of more than $85 million.

Figure 29: What is your annual company revenue?