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Why Marketing Should Be Personal

Quarterly Digital Intelligence Briefing
on Personalization

In association with Adobe

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1. Foreword by Adobe

Personalization ranks as the single most important capability in regard to future marketing activities, according to the Adobe 'Digital Roadblock' survey of marketers carried out in early 2014.

We are delighted that this new Quarterly Digital Intelligence Briefing is dedicated to personalization, a topic which has become top-of-mind for companies wanting to improve the customer experience and financial performance simultaneously.

It is no surprise that marketers are taking this capability very seriously. The ability to personalize the digital experience at scale is now a reality for those businesses which have the right technology and processes in place.

A key takeaway from this *Why Marketing Should Be Personal* briefing is the strong commercial case for personalization, with those who are doing this reporting a 14% uplift in sales.

Our clients increasingly recognize the need to be able to personalize instantaneously or near instantaneously, and the requirement for technology which can digest large volumes of data and then serve - within milliseconds - the content which is most likely to perform. The advantages of real-time personalization are also clear from this research. Those who can personalize in real time report an uplift in sales which is 33% greater than those businesses who say the type of personalization they carry out isn't instantaneous.

While we believe that the integrated nature of our technology suite gives Adobe Marketing Cloud customers a distinct competitive advantage, this report makes clear that technology alone is not enough to do this effectively.

Companies need a personalization strategy in place and a clear plan of action if they want to improve the customer experience for everyone - from first-time visitors to loyal customers. A personalization framework should embrace all relevant customer touchpoints and devices, and not one or two channels in isolation. As the research below describes, the right blend between 'man and machine' is crucial for achieving this.

Encouragingly, as this report references, Adobe research has also found that companies are increasingly hiring employees with the perfect blend of personalization expertise - a necessity in order to most effectively leverage the digital marketing technologies now readily available across all business sectors.



Mark Phibbs
Vice President, EMEA Marketing, Adobe

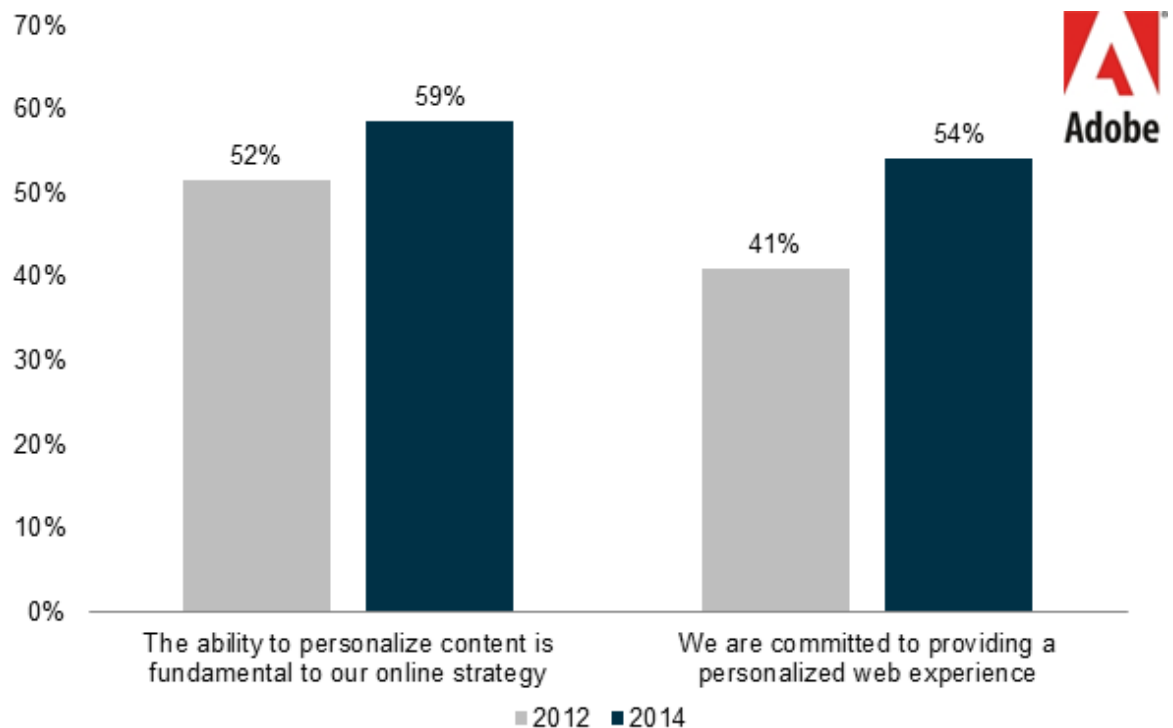
2. A fundamental part of digital strategy

Personalization has unquestionably emerged in the last couple of years as one of the hottest topics within the spheres of digital marketing and ecommerce, and this is borne out by the great response to the survey which underpins this research. More than 700 marketers across a range of businesses took part. As the chart below shows, digital marketers are seven percentage points more likely than in 2012 to agree that the ability to personalize is 'fundamental to their online strategy' and 13 percentage points more likely to concur that they are 'committed to providing a personalized web experience' (Figure 1).

What has happened in that timeframe to explain these significant changes in opinion? As the link between an improved customer experience and better commercial performance has become more obvious, the ability to personalize is rightly seen as something which can be transformative for businesses as they seek to differentiate from competitors. Last year, in recognition of the increased opportunities afforded by this capability, personalization was heralded as one of 12 key pillars of the Modern Marketing Manifesto¹, published by Econsultancy and Marketing Week.

Figure 1: Perceived importance of personalization to businesses

Proportion of respondents who 'agree' with statement



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company respondents 2014: 251

Company respondents 2012: 135

Note: The survey question was phrased as follows: "To what extent do you agree or disagree with these statements?"

¹ <https://econsultancy.com/blog/62668-our-modern-marketing-manifesto-will-you-sign>

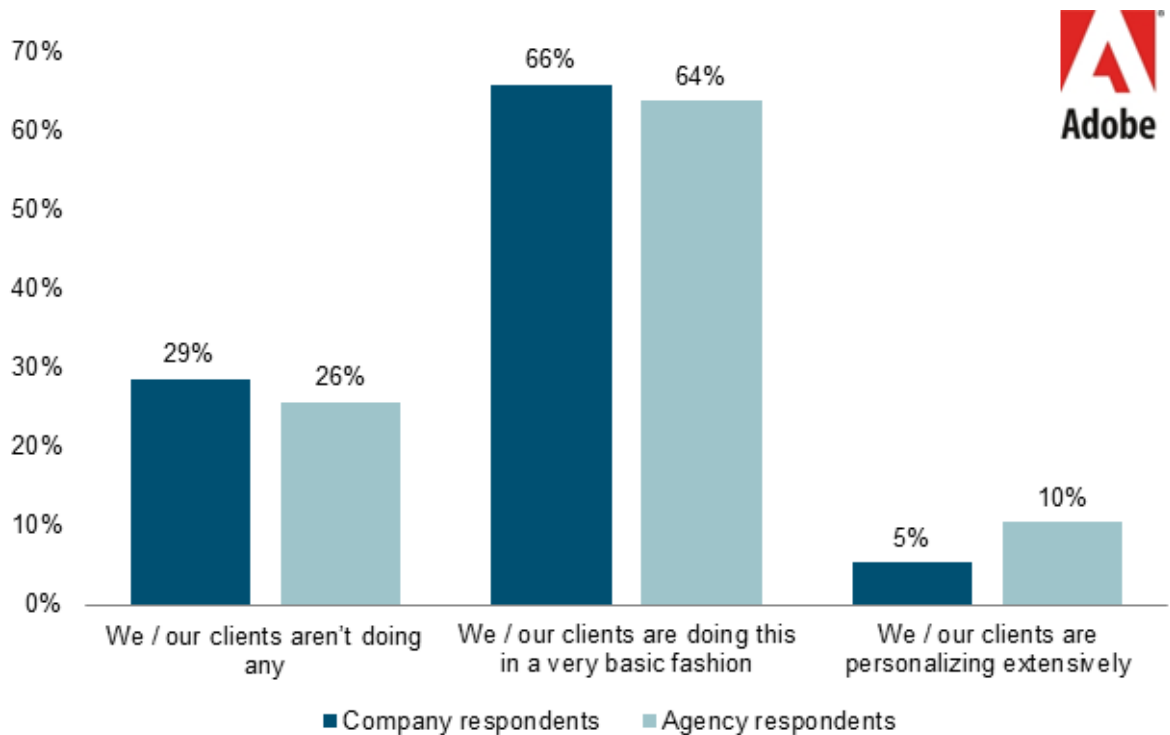
Modern Marketing Manifesto - Personalization

“In the quest to deliver outstanding brand experiences across channels, we believe that personalization offers the greatest opportunity to transform what customers currently get. Digital channels in particular allow us to use everything we know about a customer to inform and optimize each interaction. Location, device, screen size, usage characteristics, the weather... we are in an era where we have exciting and powerful new data points to power personalization. Personalization is not just for existing customers: we no longer need to know who the person is to provide convenient and relevant experiences. As modern marketers we respect the privacy of our customers and recognize we must deliver value to them in exchange for personal data.”

As can be seen in *Figure 2*, only 5% of client-side respondents are personalizing ‘extensively’, compared to around two-thirds (66%) of businesses who are doing this in a ‘very basic fashion’ and 29% who aren’t doing it all.

As the extract included above from the Modern Marketing Manifesto makes clear, personalization does not necessarily require personally identifiable information to tailor the experience. As shall be explored further in the next section of the report, there is a whole range of data about individuals which can be used to customize the experience without knowing exactly who they are, for example if they are visiting your website for the first time.

Figure 2: Approach to digital personalization



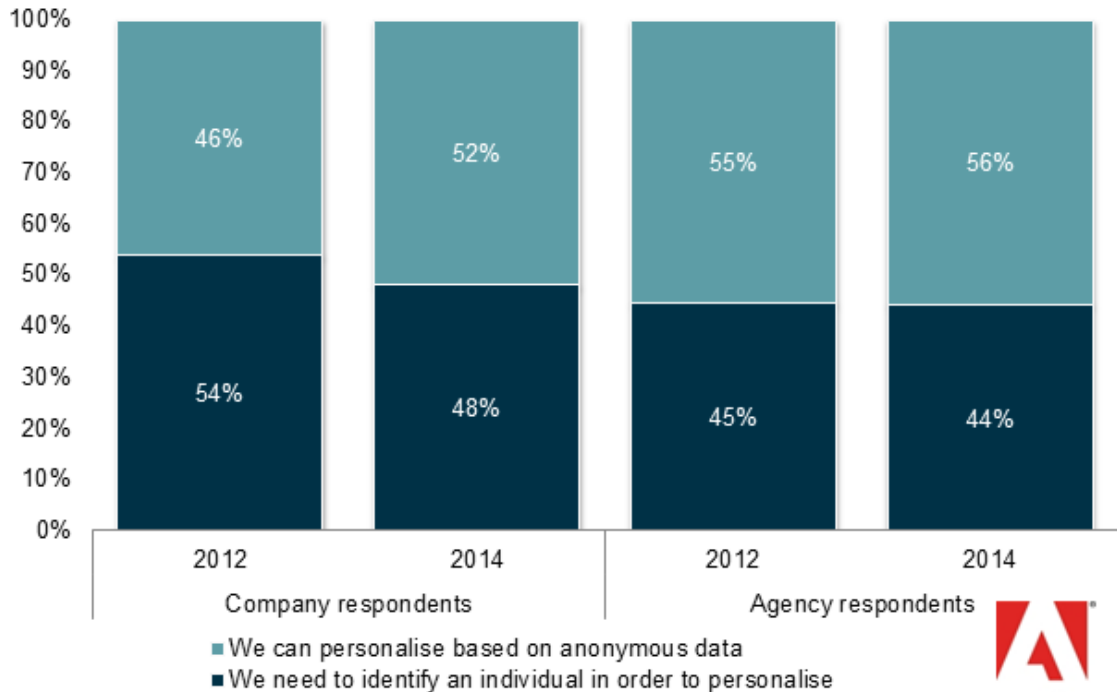
Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company respondents: 335
Agency respondents: 307

Note: The survey question was phrased as follows: ‘How would you describe your (or your clients’) approach to digital personalization?’

Respondents are beginning to realize that personalization based on anonymous data is possible; *Figure 3* shows that slightly fewer respondents than two years ago believe that you need to identify individuals before you can serve them with a personalized experience (48% this year compared to 54% in 2012).

Figure 3: When personalizing a web experience, is it critical that you (or your clients) can identify an individual, or can you (or they) do so on the basis of anonymous data?



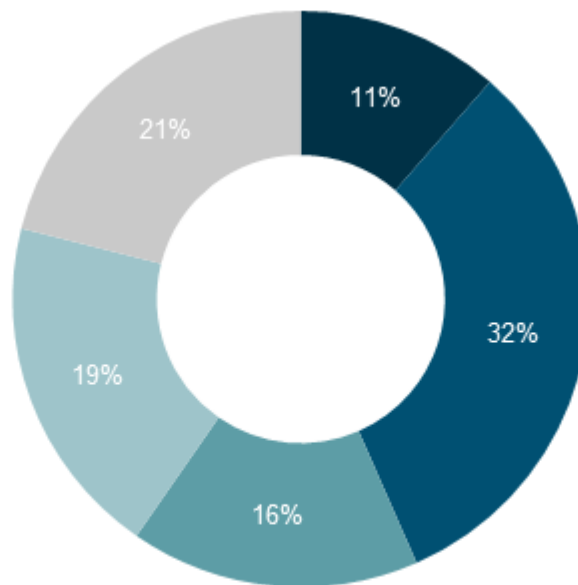
Adobe / Econsultancy Quarterly Digital Intelligence Briefing



*Company respondents 2012: 83
 Agency respondents 2012: 134
 Company respondents 2014: 217
 Agency respondents 2014: 193*

Figure 4 shows that only a minority of responding companies have an approach to personalization which focuses on first-time visitors all the way through to loyal customers. Only 11% 'strongly agree' this is the case, while another 32% simply 'agree'. This reinforces the need for taking a joined-up approach to personalization, and not to look at individual channels as silos or anonymous segments. Companies typically need a more nuanced approach to their use of personalization to ensure that they are not missing an opportunity by limiting the types of site visitor or customer for whom they personalize the experience.

Figure 4: 'Our personalization efforts focus on first-time visitors through to loyal customers'



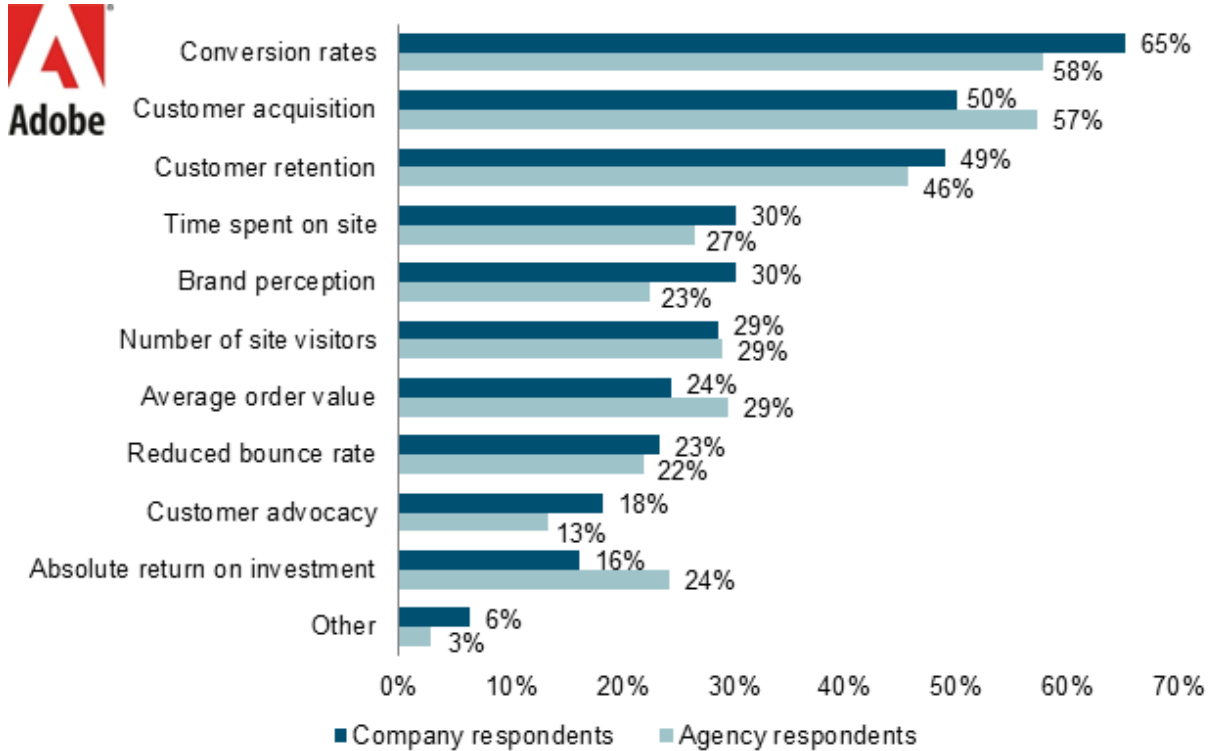
■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree

Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company respondents: 228

While the personal touch is a time-honored way for businesses to keep their customers loyal in the offline world, it is only relatively recently that technology has enabled businesses to do this at scale online. But despite advances in technology, it is clear that most companies are only personalizing at a fairly elementary level, despite a range of business benefits resulting from personalization; from improved conversion rates to better customer advocacy (Figure 5).

Figure 5: How do you (or your clients) measure the benefits of personalization?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company respondents: 192
Agency respondents: 173

3. Intelligent use of data

The age of big data has enabled personalization of digital experiences in a way that wasn't possible even a couple of years ago, allowing marketers to align the online experience with the levels of personalized customer service historically associated with face-to-face interaction in retail outlets.

The exponential increase in the amount of data, from a plethora of different sources, is accelerating the rate at which the effectiveness of online personalization has progressed, with data being used in increasingly intelligent ways.

Respondents to the survey were asked if they used a wide range of data types, from personally-identifiable first-party data, to browsing session and behavioral data. The majority of both company (65%) and agency (70%) respondents point to personalization of the web experience based on *personal data (including name, gender and location)*, shown in Figure 6 below.

Just under half of all respondents selected *user preferences*, making it the second most-selected option, followed by *purchase history* in third place. The least used data-type is revealed as *third-party demographic data*, used by just 7% of companies responding to the survey.

Figure 6: Information used to personalize the web experience



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Company respondents: 238
Agency respondents: 226

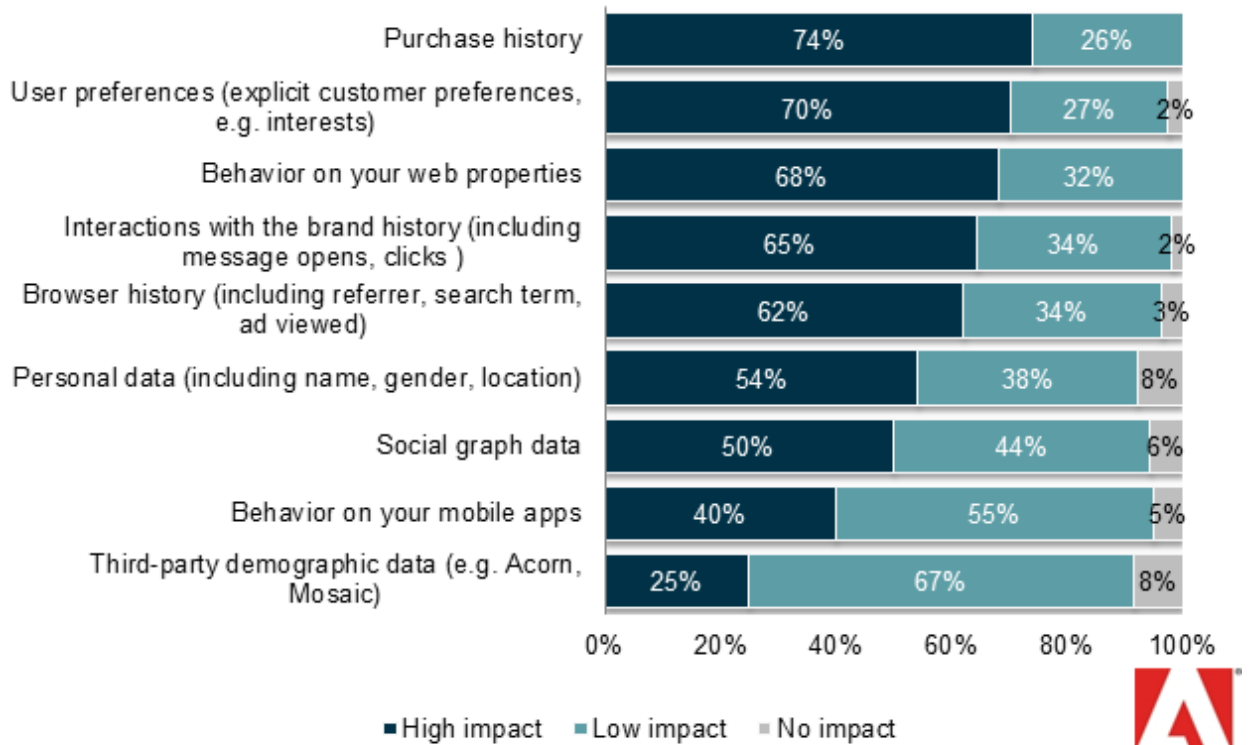
Note: The survey question was phrased as follows: 'Do you or your clients personalize the web experience based on any of the following types of information?'



Despite only 38% of companies using purchase history to personalize the web experience, *Figure 7* shows that 74% of respondents said use of historical transactional data has a high impact on return on investment (ROI). The use of personal data – the data-type most used by all respondents for web personalization – was selected by just over half of companies as having a high impact on ROI, while 38% said its impact is low.

Third-party demographic data is thought to have the least financial impact, with three-quarters of respondents saying its use for personalization has little or no impact on ROI.

Figure 7: Thinking about return on investment (ROI), please rate the impact of personalization based on the following sources of data



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

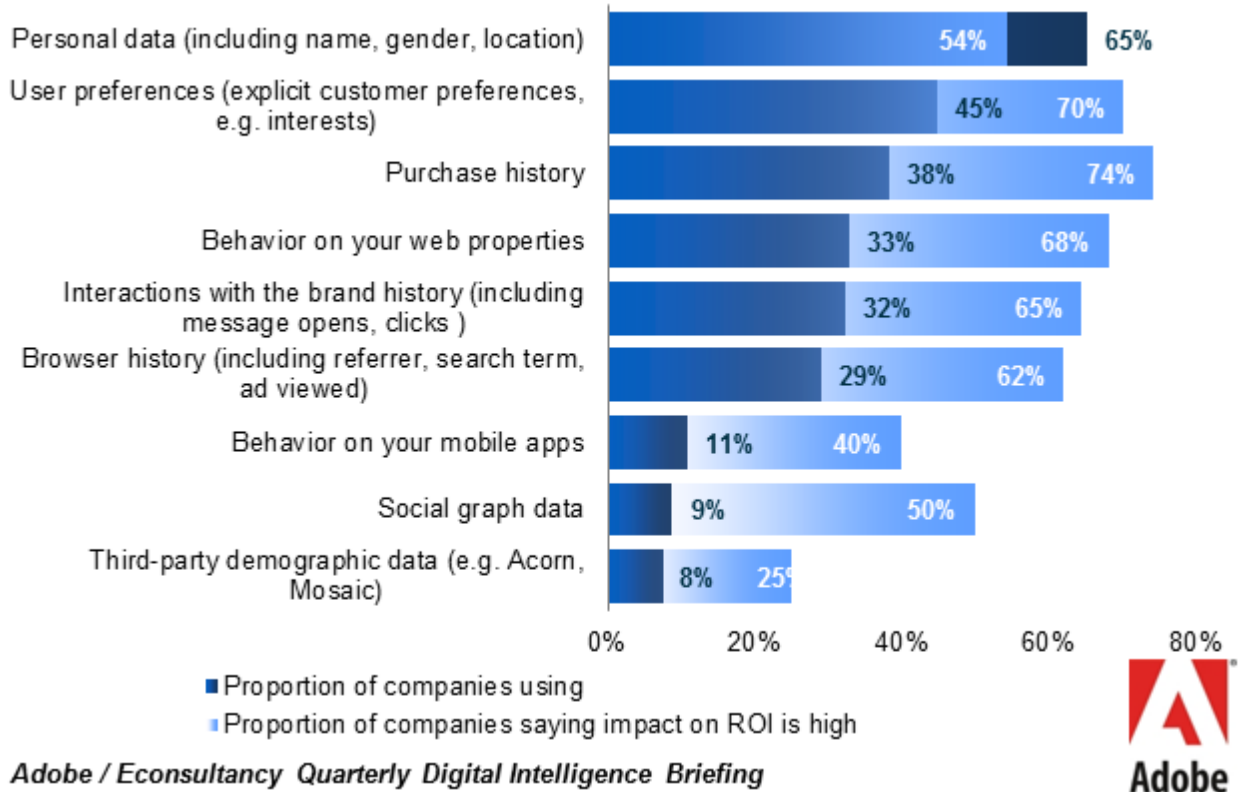


Company respondents: 138

Figure 8 shows that many responding companies are missing out on high return on investment from data sources which they are not using for personalization. The biggest opportunity appears to be personalization based on purchase history, as already described in Figure 7.

Use of behavioral data and information gleaned from previous brand interactions and browser histories all have a high impact on ROI, yet less than 40% of companies are using each of these data sources for personalization.

Figure 8: Types of data used for personalization and impact on return on investment (ROI)



Company Respondents: 138

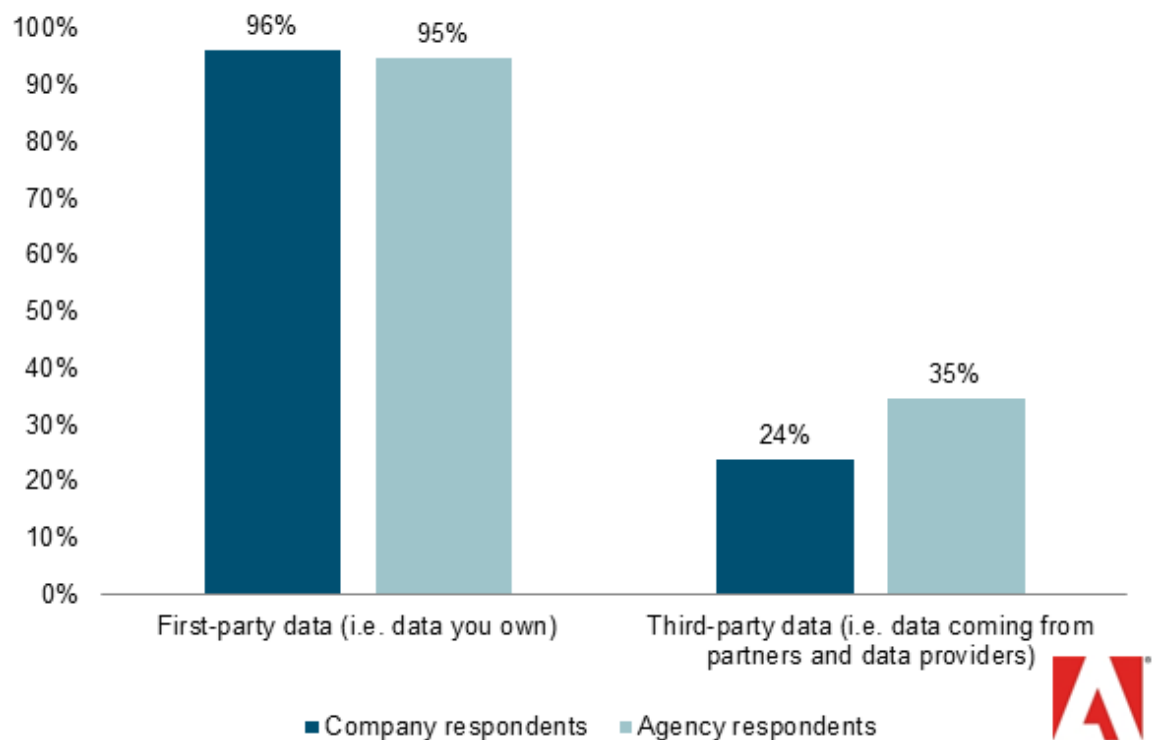
Figure 9 shows the use of first- and third-party data, with less than a quarter of companies (24%) using the latter. A slightly higher proportion of agency respondents (35%) report that their clients are using third-party data. In comparison, almost all companies and agencies report use of first-party data, 96% and 95% of companies and agencies respectively.

First-party data enables explicit personalization, usually executed through a log-in allowing user preferences and settings to be collected. Third-party data can then be used to supplement this explicit personalization, in addition to the use of anonymous, cookie-based data.

The use of third-party data for personalization enables brands to personalize the experience for users beyond their own database. It can be used, for example, to serve targeted display ads to attract new customers. The availability of increasing amounts of third-party data has improved the ability of marketers to track relevant audiences and present them with relevant offers and content.

However, pulling together first- and third-party data into a format that can be used to target customers can be an issue for brands as a result of differing data formats and silos. Creating a unified customer profile, combining both first- and third-party data, and using this for personalization, is a process that many companies have struggled with, but the increased availability and use of data management platforms (DMPs)² is starting to make this easier.

Figure 9: Types of data used for personalization



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Company respondents: 214
Agency respondents: 193

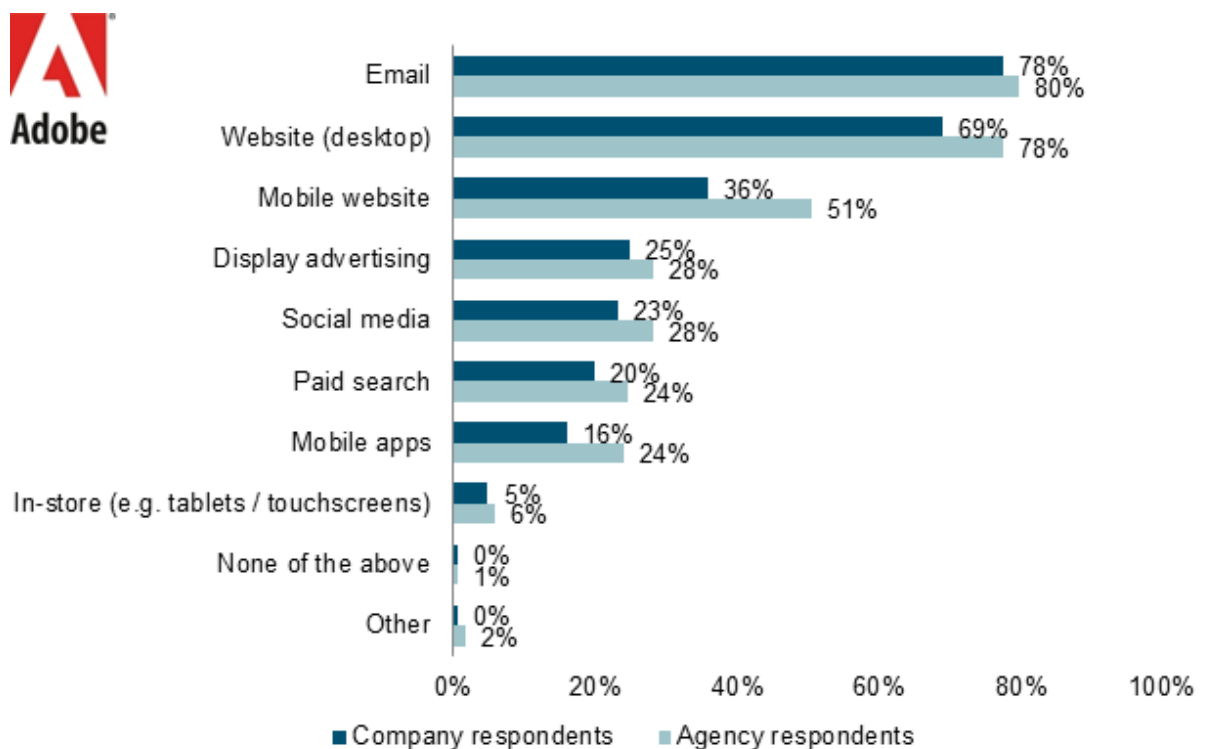
² <https://econsultancy.com/reports/dmp-buyers-guide>

4. From email to cross-channel personalization

As consumers, it is clear from *Figure 11* on the next page that we are most likely to encounter personalization of the digital experience when we are engaging with companies through email or on their desktop website.

Four in five companies (80%) claim they are personalizing their email though this may range from a basic mail-merge type approach using a customer's name to sophisticated one-to-one marketing where data from a multitude of sources are harvested to make sure that the optimal message is received at exactly the right time (*Figure 10*).

Figure 10: Through which channels are you / your clients personalizing the digital experience?



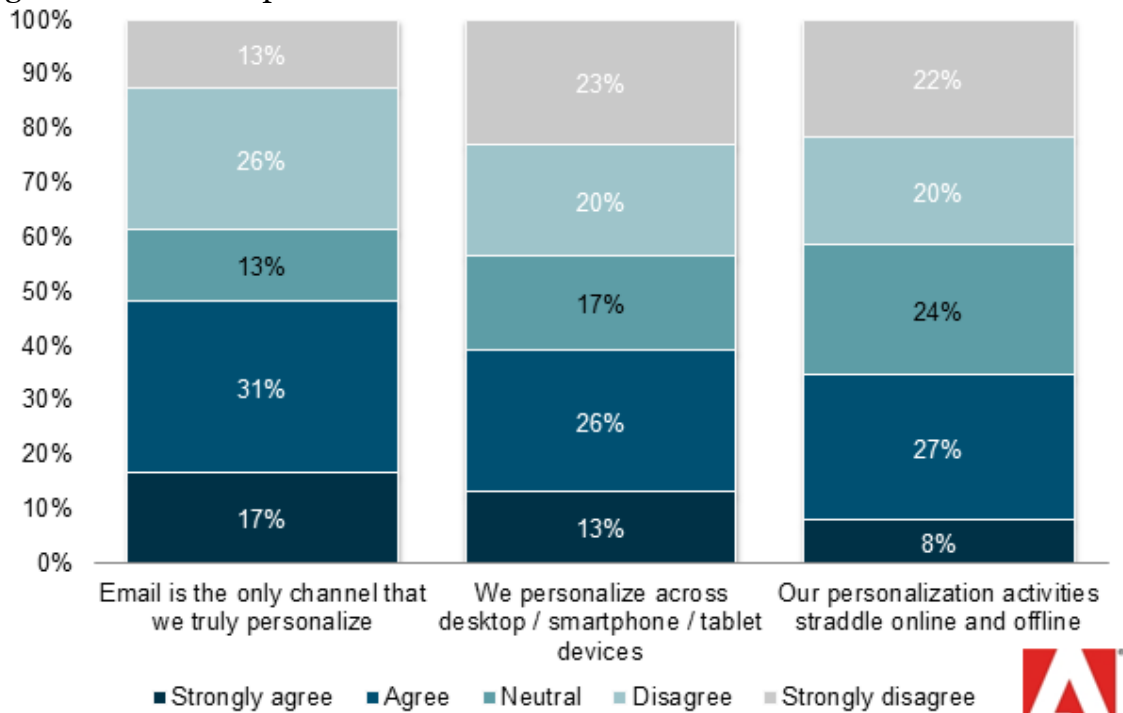
Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company respondents: 206
Agency respondents: 188

Only 39% of marketers say they personalize across desktop, tablets and smartphones, a disappointingly low percentage which highlights the technical and data privacy-related challenges of keeping track of people across different devices. This is especially true for companies where site visitors and prospects may not be required to log in.

Personalization becomes even harder when marketers start to merge data from both online and offline channels, for example point of sale data, and this is illustrated by the fact that only 35% of respondents say that their activities in this context 'straddle both online and offline'. Some of the answers to open-ended questions, shown in a panel on the next page, underscore the extent to which complexity of the customer journey can be a barrier to personalization.

Figure 12: Extent of personalization



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Company Respondents: 250

Note: The survey question was phrased as follows: "To what extent do you agree or disagree with these statements?"

Personalization Challenges - Voice of the Marketer

"Complexity of our digital roadmap and the dependency on personalization of other technology projects."

"One of our main strategic focus areas for ecommerce is to offer flexible packages and targeted offers. A fundamental activity here is personalization. From the basic level of segmented email campaigns, via cookies for web visits, to full integration between customer database, booking engine and social media."

"The EU changes to cookies and beacons means our own data will become more important in retaining existing customers. Meaning content relevant to an individual will become paramount to our customer engagement strategy and permission to communicate."

"Complications arising from the integration of multiple selling and customer service platforms with CRM and behavioral data to create personalized propositions. To do personalization properly the business needs to orientate itself to that being a way of doing business and not just a sales appendage for a small team...this is a very slow process in a large organization and not an easy battle to fight."

Survey respondents



5. Technology must be integrated to enable success

Marketing technology is the enabler for personalization at scale, allowing marketers to increase their chances of success with subtle or even major changes to the digital experience when encountered by different consumers.

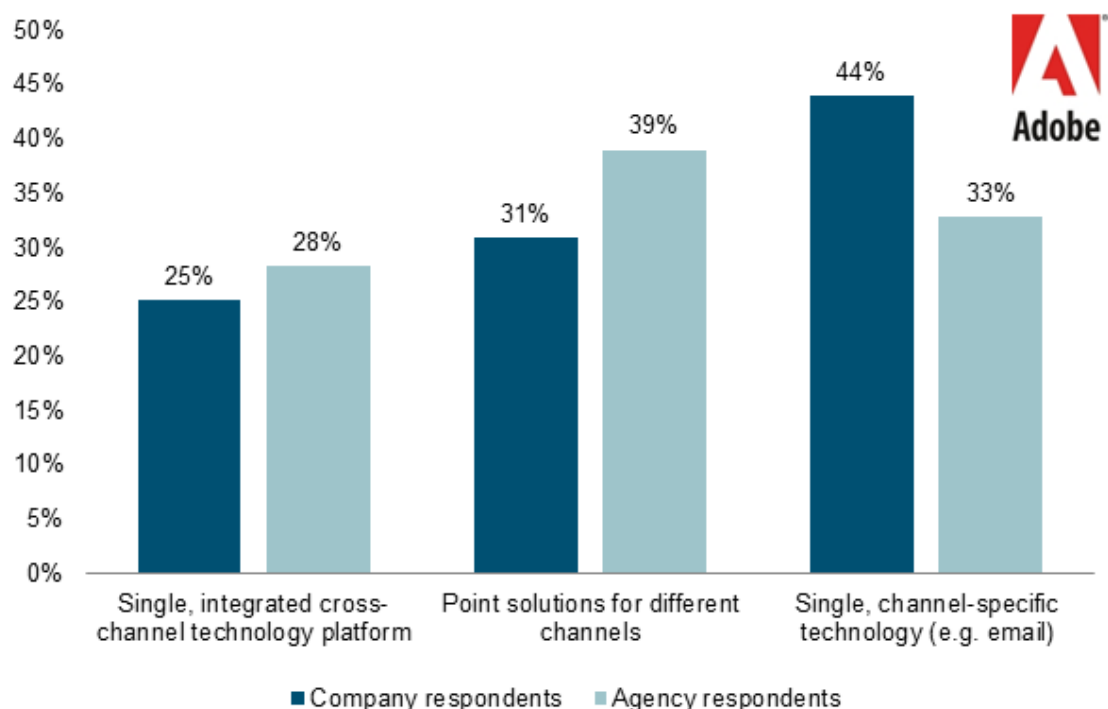
Digital technologies allow brands to be smarter and more efficient in their approach, increasing their chances of not only converting prospects but also building a loyal customer base along the way.

Figure 13 shows the different types of technology-related approaches to personalization, and the extent to which a point solution or solutions are being used compared to joined-up technology platforms.

Client-side survey respondents are most likely to say their organizations are using a *single, channel-specific technology*, with 44% of company respondents saying this is the case. This use of specific technologies reflects the reliance by many companies on a single, specific channel for personalized delivery of content. As documented earlier in the report, this is most likely to be an email platform or content management system.

Only 25% of responding companies say they are using a *single, integrated cross-channel platform*, while 31% are using point solutions for different channels.

Figure 13: Marketing technology used to personalize the digital experience



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

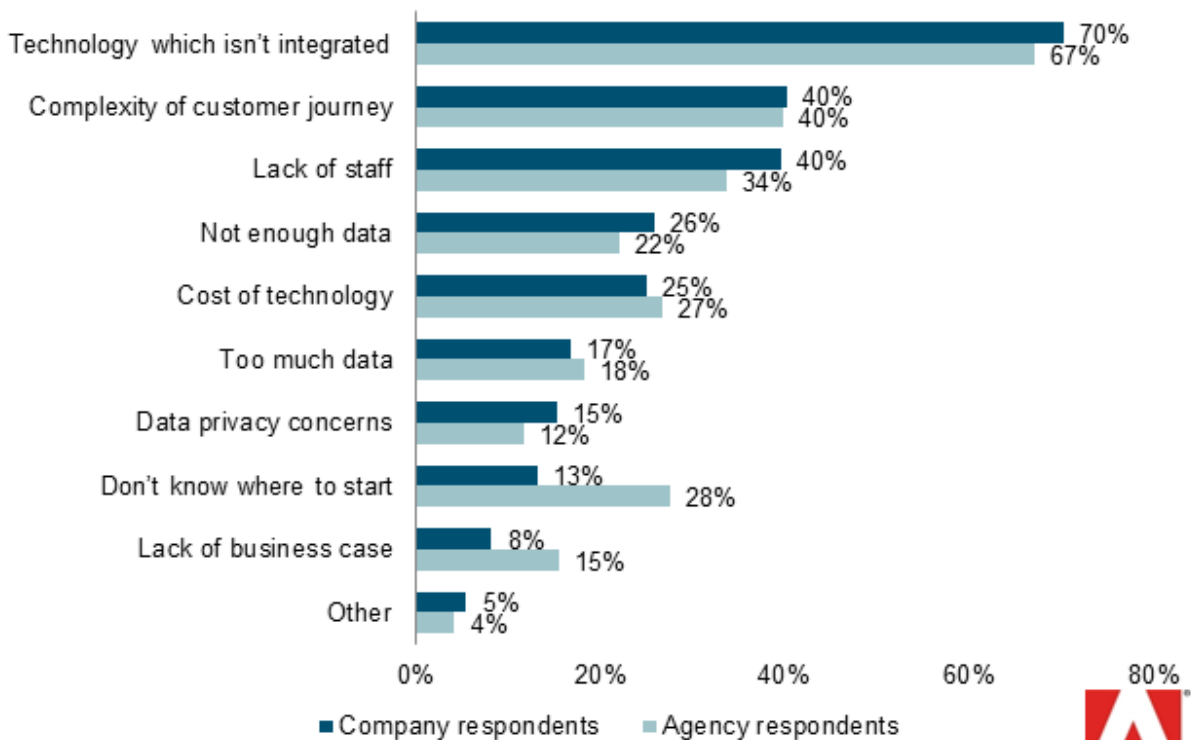
Company respondents: 191
Agency respondents: 177

Note: The survey question was phrased as follows: 'How would you describe the marketing technology you / your clients use to personalize the digital experience?'

Personalization needs to constantly evolve with the changing expectations of consumers. For this evolution to be painless for brands it is important that personalization technology can easily integrate with other marketing, sales or customer service platforms, so that different sources of data can be harnessed to make targeting even more effective.

The importance of a joined-up platform or platforms is underlined by *Figure 14* below which shows that the most significant barrier to using digital personalization is *technology which isn't integrated*, cited by 70% of client-side respondents and 67% of agency respondents as a top-three obstacle to success. Technological limitations can hinder even the most dynamic marketers who can become frustrated or even put off by the arduous manual work involved when technology is not delivering.

Figure 14: What are the main barriers to use (or better use) of digital personalization?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



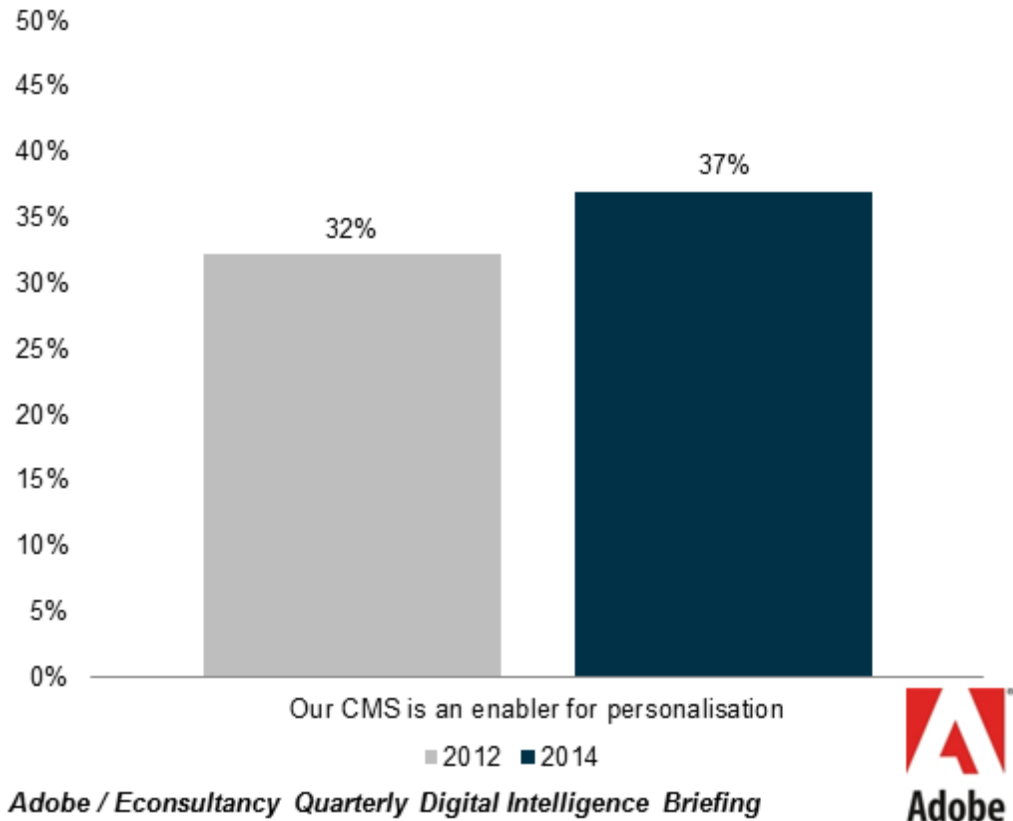
Company respondents: 255
Agency respondents: 213

Note: Respondents could check up to three options

On a positive note, *Figure 15* shows that organizations are more likely to see their content management systems as being helpful for personalization, though the percentage is still low. Since 2012, the proportion of respondents agreeing that their *CMS is an enabler for personalization* has increased by 5 percentage points to 37%. The flipside of this statistic is that less than half of responding companies believe that their CMS is conducive to personalization.

Figure 15: 'Our CMS is an enabler for personalization'

Proportion of respondents who 'agree' with statement



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

2012 company respondents: 67
2014 company respondents: 87

6. Man and machine ... finding the right blend

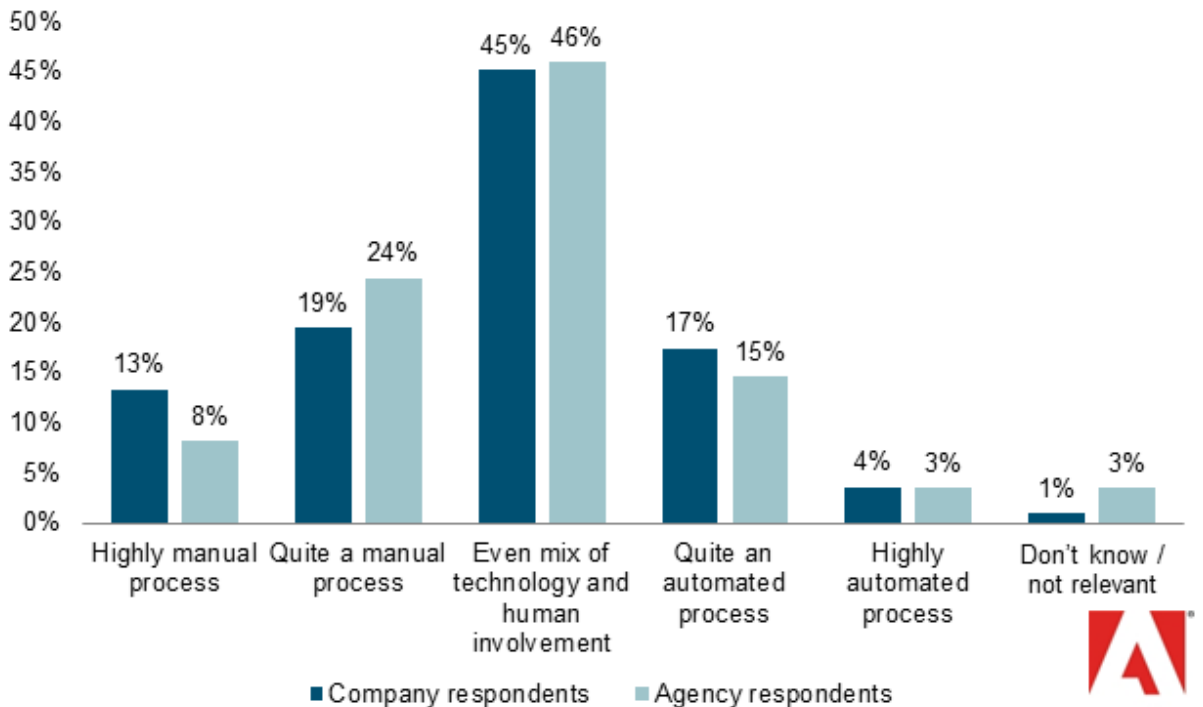
Personalization is, like any other digital capability, powered by data; it requires a balance of power between man and machine. At its best, personalization springs from a strategy that is based on a strong understanding of the customer and is expressed by smart, automated execution.

That balance is hard to achieve. As we saw earlier, only 5% of companies are doing personalization at a sophisticated level. That owes more to a crisis in strategy and execution than a capability gap in technology. As we see in the chart below, companies fall across a spectrum. Some are heavily geared toward the machine side, while others are heavily manual. Both extremes have their weaknesses.

An over-emphasis on technology generally means that companies have found some ways that personalization works and are happy focusing on them. This makes sense to a degree, but once a capability gets to the point of being optimized and reapplied across campaigns and programs, it stops evolving.

Personalization is still in its infancy. Even cutting-edge agencies and brands are only scratching the surface of how the integration of mobile, real-time and personalization can create remarkable marketing. It's much too early to be in wash-rinse-repeat mode. Companies that fall into this trap need to take a step away from standard operating procedure and refocus on strategy.

Figure 16: Approach to digital personalization: manual or automated?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Company respondents: 195
Agency respondents: 172

On the other side of the equation, marketers forced to approach personalization as a manual process are wasting their opportunities in other ways. Most importantly, marketers at all levels are already under severe time pressure and a manual approach to personalization isn't going to help.³

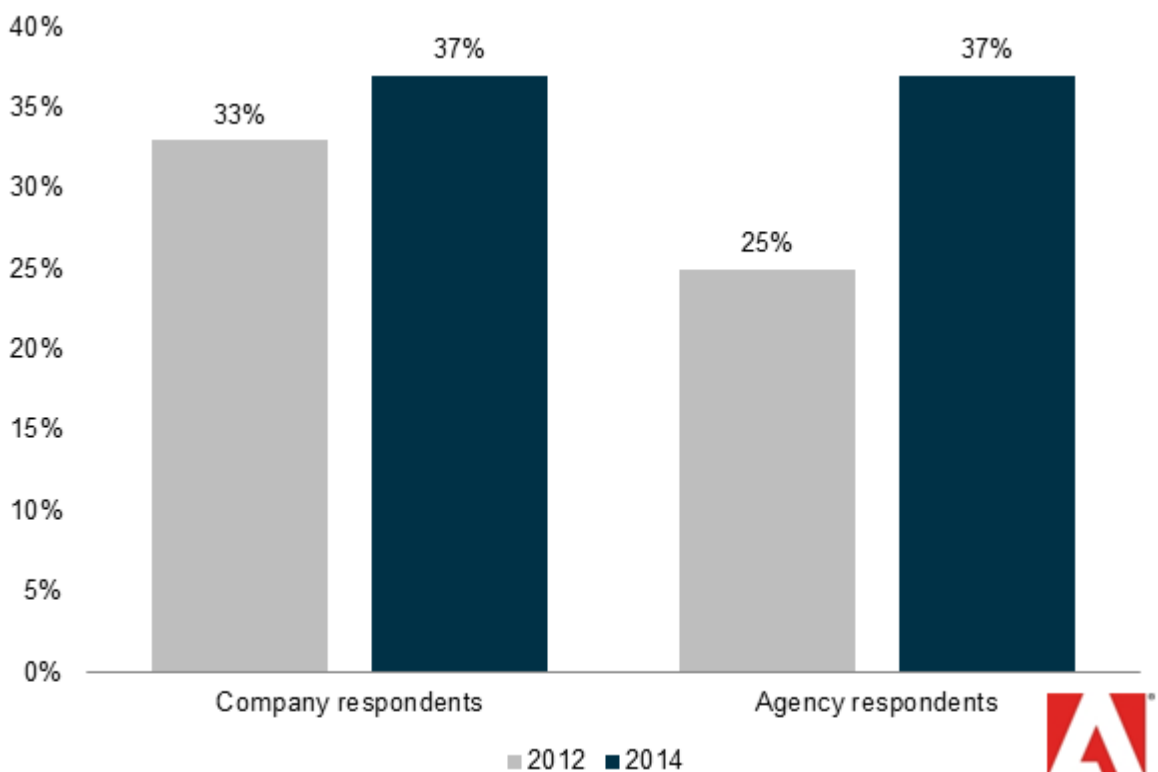
Time is usually spent on creating templates that can be applied to different segments or by user profile elements. This is very much worthwhile, but the process should rely on technology to eliminate repetition and reduce opportunity cost.

The cost of that time is felt in testing as well as planning and strategy. In nearly two years, there's been little positive movement among brands comparing personalized content performance with generic content delivery (Figure 17). Among agencies the percentage has increased significantly, but is still less than 40%. Companies that aren't testing the impact of personalization are putting themselves in a difficult position when it comes to resourcing; it's hard to justify new technology and headcount to run it when the numbers aren't there to back up the plan.

Just as important; those who haven't yet found a balance between man and machine, between strategy and execution are leaving money on the table. Most brands have made the leap, connecting customer experience with growth...but clearly many haven't realized that a great customer experience is personal and unique.

Figure 17: 'We (or our clients) run tests to see how personalized content performs versus non-personalized content'

Proportion of respondents who 'agree' with statement



Adobe / Econsultancy Quarterly Digital Intelligence Briefing



Company respondents 2012:66
 Agency respondents 2012:89
 Company respondents 2014:233
 Agency respondents 2014:219

³ Econsultancy, [The Email Marketing Speed Imperative](#), 2014



7. How real-time is personalization?

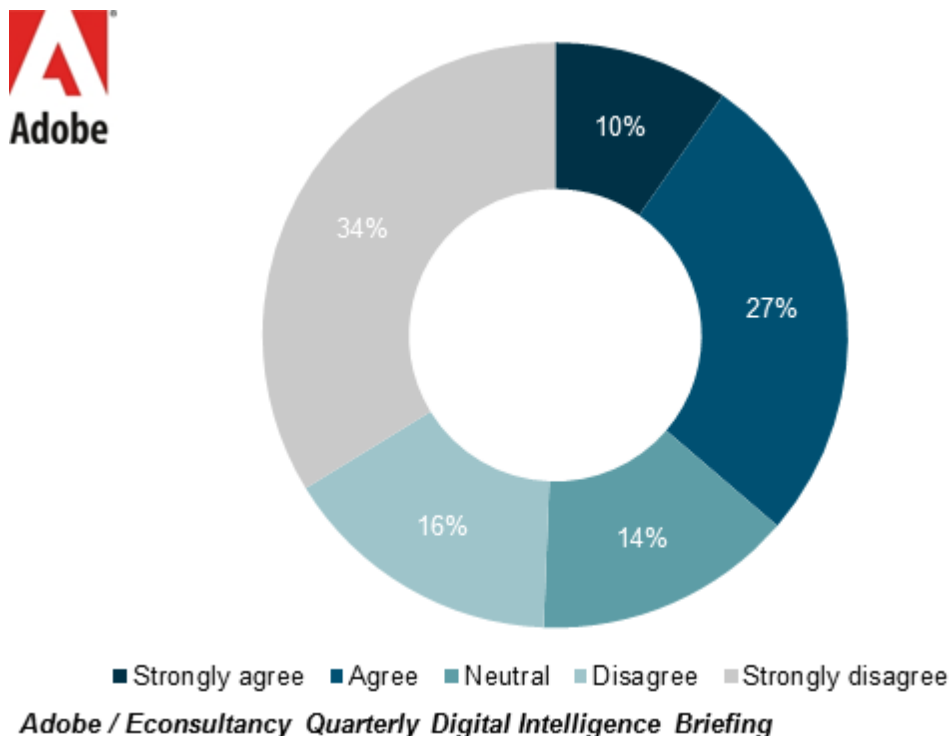
Real-time personalization entails customizing content for an individual customer instantaneously, for example using geo-targeting to promote products or services relevant to the user's location or customized in milliseconds based on a myriad of other data points.

Tailored content can be delivered at times when customers are most receptive and in ways that are more likely to stimulate engagement. Although the technology and data necessary to achieve this already exist, many organizations still consider it a distant dream, mostly because they are far from equipped to respond to customer behavior in real time.

According to separate research conducted by Adobe⁴, personalization ranked highest in terms of importance to respondents' future marketing efforts. Around two-thirds of organizations surveyed (69% in the US⁵ and 66% in Europe⁶) agreed that marketers need to embrace 'hyper-personalization' (i.e. using data to provide the right products, services and content at the right time).

However, our survey revealed a significant gap between the perceived importance of personalizing experiences at the right time and the ability of companies to deliver on it. Just over a third (37%) of organizations surveyed indicate they 'target personalized web content in real time', while half are not able to do so, as shown in *Figure 18* below. This figure increases to 64% of smaller companies, i.e. those with annual revenues of less than \$240M.

Figure 18: 'We target personalized web content in real time'



Respondents: 237

⁴ Digital Roadblock: Marketers struggle to reinvent themselves, 2014

⁵ <http://www.adobe.com/content/dam/Adobe/en/solutions/digital-marketing/pdfs/adobe-digital-roadblock-survey.pdf>

⁶ <http://www.adobe.com/content/dam/Adobe/en/solutions/digital-marketing/pdfs/adobe-digital-roadblock-survey-emea.pdf>

There's no doubt that delivering personalized experiences in real time can result in increased engagement and more loyal customers, which have a knock-on effect on the bottom line. Companies targeting personalized content in real time are seeing, on average, 16% uplift in sales. This is higher than the uplift of 12% seen by those who are carrying out personalization but not in real-time, translating into a significant amount of additional sales for businesses across a range of business sectors.

So, when factoring in all these benefits, why are organizations still falling short of meeting customers' personalization expectations?

- When delving deeper into the data, it becomes apparent that **technology** plays a major role in enabling organizations to carry out real-time personalization. Companies using a single, integrated cross-channel technology platform are 44% more likely to be able to target personalized content in real time than those using point solutions for different channels. When asked to identify the main barriers to use (or better use) of personalization, half (52%) of those who don't target personalized content in real time said they are plagued by 'technology which isn't integrated'.

Many companies invest in technology without even thinking about what customers expect and need, with no real personalization strategy in place. This often results in disjointed experiences, with technology becoming more of a problem than a solution.

- Even the most sophisticated technology is useless without a **solid data foundation**. Interestingly, less than a third (28%) of those not personalizing in real time say that 'too much data' prevents them from using personalization effectively, while 'not enough data' is an issue for half (51%) of these companies.

Pulling data from disparate systems and tracking consumers as they jump from one touchpoint to another is a seemingly impossible task. Having an integrated structure internally and prioritization are key success factors. For which customer segments is it imperative to personalize? Which customer interactions actually need a personal touch? Are you sure you're not 'over-personalizing' some experiences and going into 'this is creepy' territory?

- One of the biggest hurdles that many companies face is a lack of resources, skills and knowledge within the organization. A closer examination of the data shows that more than half (55%) of companies who don't target personalized content in real time cited 'lack of staff'.

Investing in **skilled staff** is key to bolstering personalization capabilities and there's evidence that some companies are taking this route. According to the above mentioned Adobe research, compared to last year, around a third of European companies are hiring more staff with personalization expertise (7% much more, 23% somewhat more).

Finally, don't forget that personalization (whether it is real-time or not), is an iterative process. Successful organizations continuously assess, prioritize and optimize.

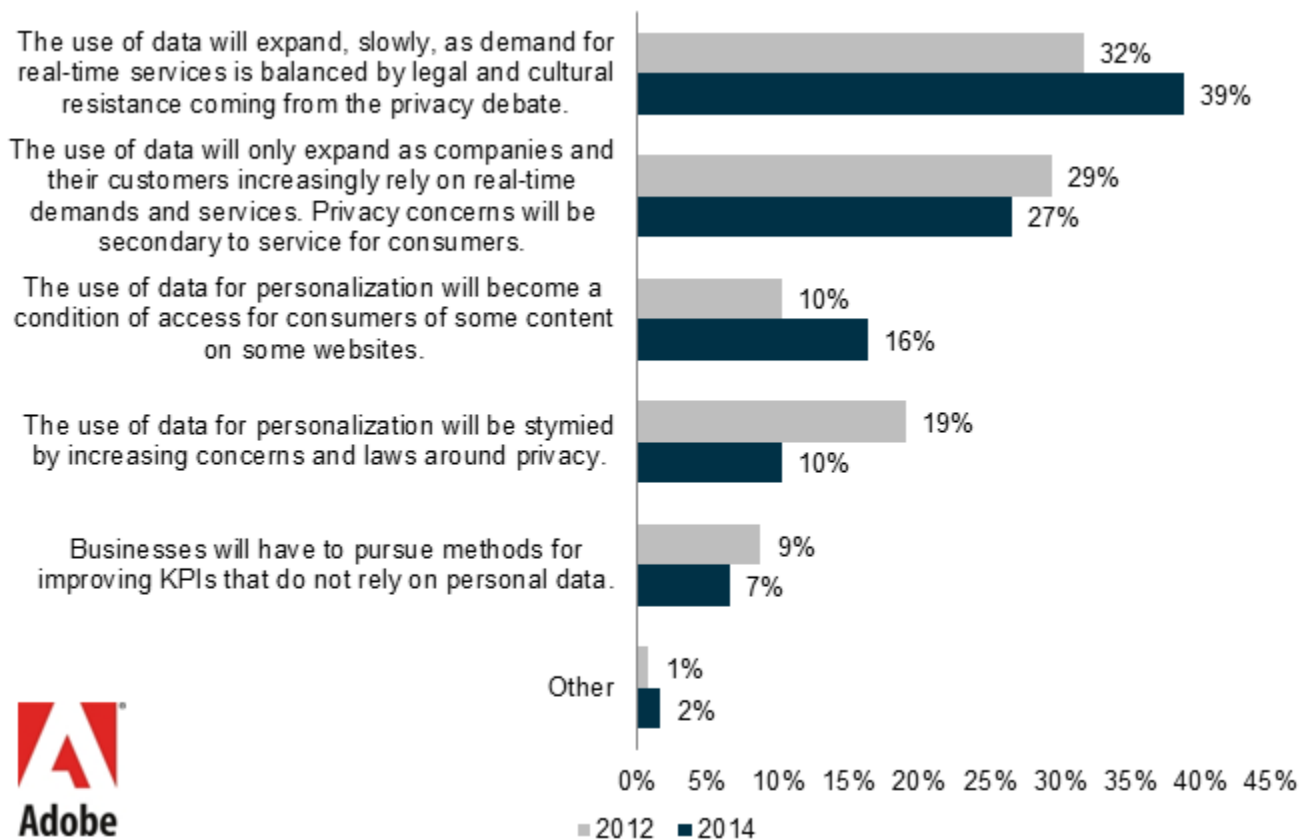
8. Privacy and the quest to avoid creepiness

Every marketer has had that moment when someone they've just met tells a story of digital personalization gone awry. Usually it's a story of a pair of shoes or wine club membership trailing after the consumer in a case of enthusiastic retargeting, but in other cases it's something potentially more consequential if seen by an unintended audience, like an engagement ring. These moments remind us that privacy isn't just a set of laws and guidelines; privacy is a feeling in the hearts and minds of our customers.

Personalization falls squarely at the intersection of privacy and convenience. While marketers must strive to provide a more tailored customer experience, they must also be vigilant to guard against perceived privacy intrusions.

Showing an increase on the figures in 2012, *Figure 19* illustrates that 39% of companies feel that *the use of data will expand, slowly, as demand for real-time services is balanced by legal and cultural resistance coming from the privacy debate*. These businesses see that the responsible use of customer data is business critical, but will work within data legislation to differentiate their business in real time. However, more than a quarter of respondents (27%) see the balance tipping in favor of good service for consumers, with privacy as a secondary concern.

Figure 19: Which of the following best describes how you believe the use of data will evolve in the light of consumer privacy concerns?



Adobe / Econsultancy Quarterly Digital Intelligence Briefing

Company Respondents 2012: 126
Company Respondents 2014: 245



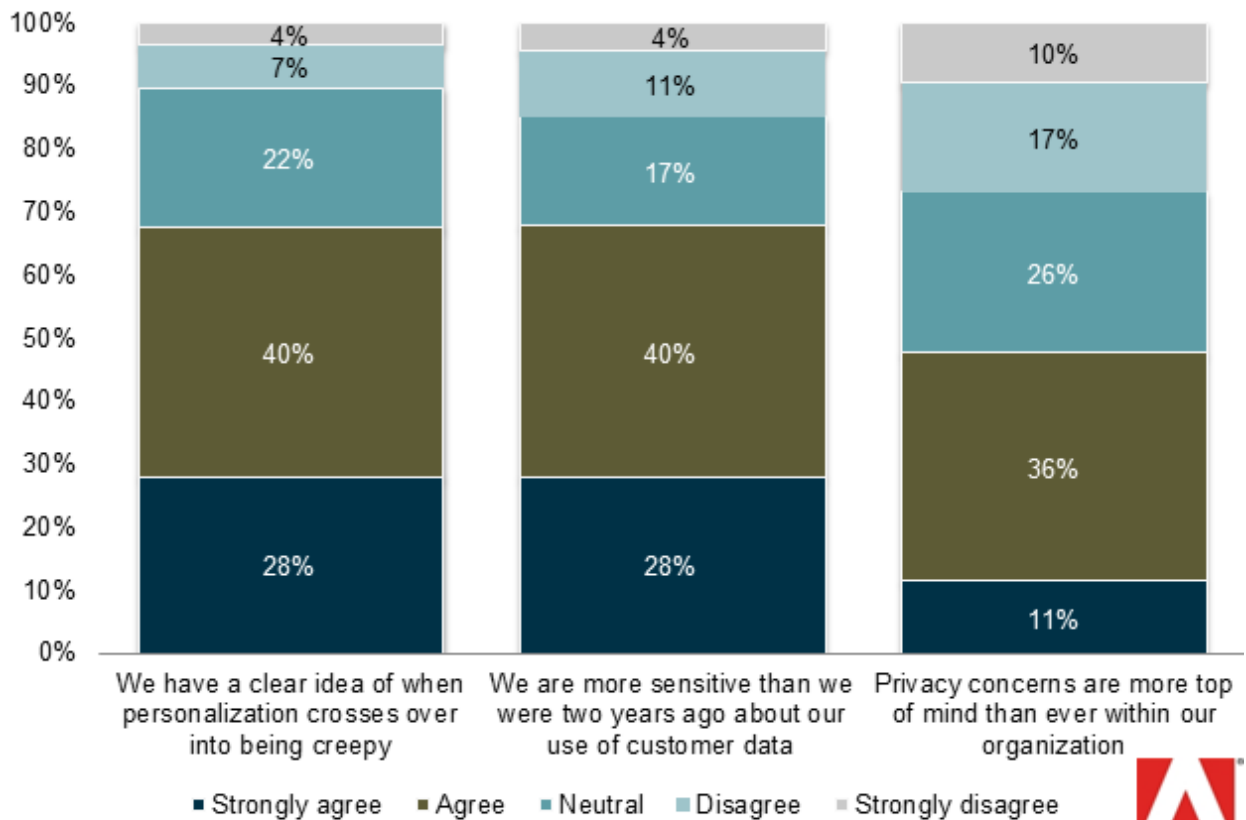
Privacy is part of an equation that balances it with relationship and situational usefulness. So even though marketers generally see an expansion and acceptance of data-related practices, it's dangerous to think of privacy as something that applies in general. Marketing is personal and so is privacy.

Personalization strategy should be formed within this context of relationship to avoid privacy concerns. The nature of a customer/prospect relationship should dictate the extent and nature of personalization.

As we see in *Figure 20*, marketers are more sensitive and aware than they were a year or two ago. Over two-thirds of respondents report having “a clear idea of when personalization crosses over into being creepy.”

The good news is that attention to personalization and its priority to marketers is increasing. The bad news is that the target is constantly moving, and every bit as “personal” as any other customer attribute. A clear focus on customer value over immediate profits is the safest approach, and the most profitable in the long run.

Figure 20: Sensitivity to privacy and use of customer data



Adobe / Econsultancy Quarterly Digital Intelligence Briefing


Adobe
 Company Respondents: 250

Data Privacy Challenges - Voice of the Marketer

“We are committed to user privacy in conformity with regulation (EC) 45/2001. It is a challenge to practice digital personalization when tracking users’ behavior is an issue. Nevertheless, providing users give their prior consent, it is possible to provide relevant content, therefore personalize the online offering.”

“There’s a fine line to walk - customers demand a more personalized approach, but can be left feeling either too little or too much personalization has been done (then they’re curious about how you ‘know them!’).”

“The use of data for personalization will be stymied by increasing concerns and laws around privacy: cross European legislation issues.”

Survey respondents

The following table sets out the different customer types and how to apply personalization to each group. The opportunity for personalizing to each group differs, but in every case, personalization can be used acquire and retain customers at different stages of the customer journey.

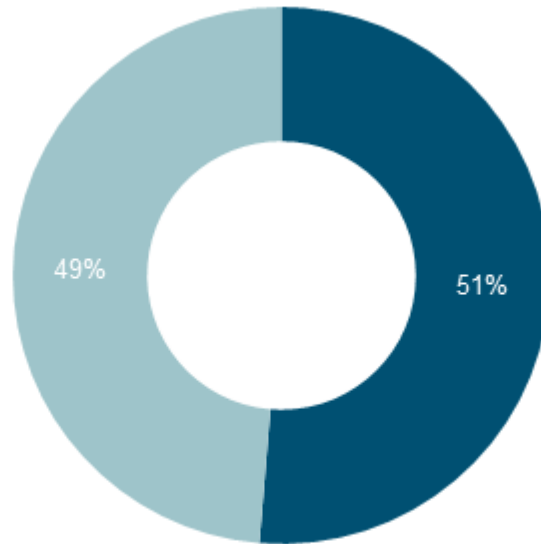
Table 1: How and where to apply personalization

Tier One	Loyalty program members	In general, we want to apply personalization where we can. As the lines blur between marketing and customer service, it’s usually in the interest of both brand and customer to increase the degree of personalization, so long as that equates to more relevant, better services.
	High frequency customers	
	High frequency visitors who haven’t purchased	
Tier Two	Multiple purchase customers	It’s customers in transition that present the most opportunity for long-time value and the greatest danger of being turned off. These liminal customer classes should be a focal point of a marketing strategy that’s geared toward moving them up the chain. Usually it’s better to approach this elegantly, by promoting value and usefulness, rather than a bombardment of offers.
Tier Three	First time customers Infrequent visitors who haven’t purchased	
Tier Four	Situational customer or user	These special cases are unique customer types. For example, airplane passengers who have been moved over from another airline. This can be an opportunity for a highly personalized experience that leaves them impressed, or a bland one that simply moves them through the system.

9. Appendix: Respondent Profiles

This Quarterly Digital Intelligence Briefing is based on an online survey of over 700 client-side and agency respondents, carried out in October 2014.

Figure 21: Which of the following best describes your company or role?



■ Client-side (part of an in-house team) ■ Agency / vendor / consultant

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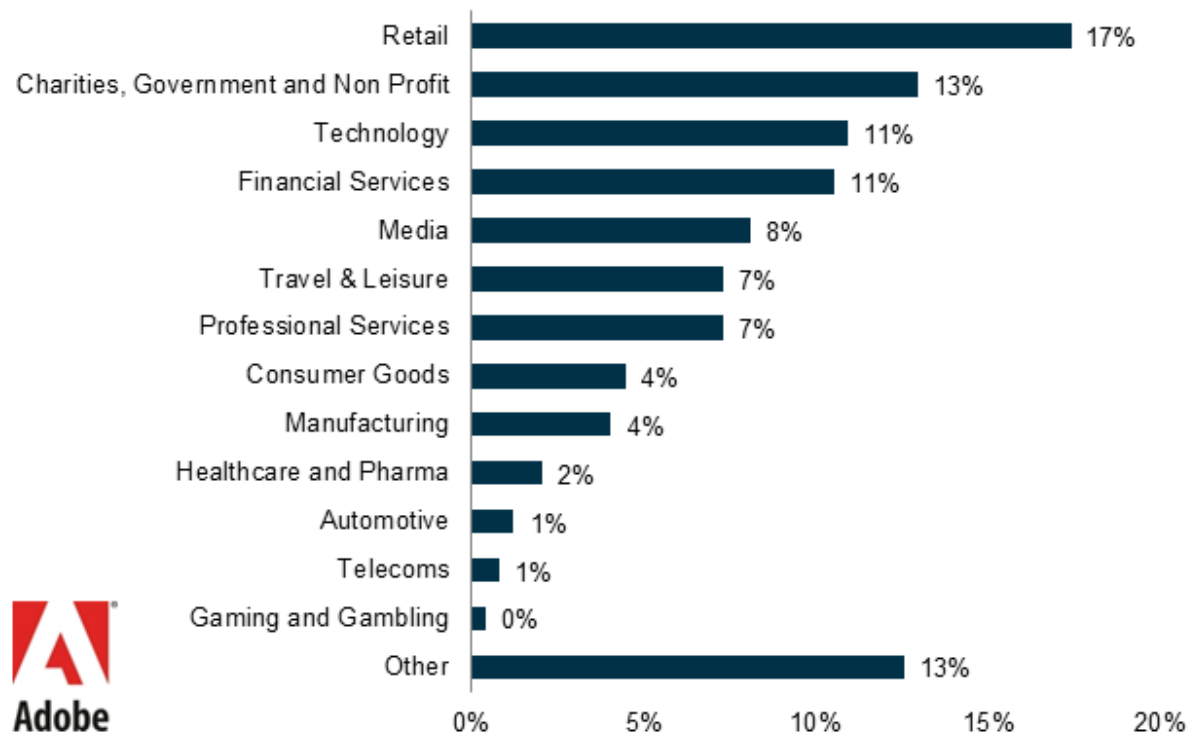
Respondents: 723

9.1. Sector

Respondents work across a wide range of different industry sectors. The best represented sectors are *retail* (17%), *charities, government and non-profit* (13%) and *technology* (11%).

Company respondents

Figure 22: In which business sector is your organization?

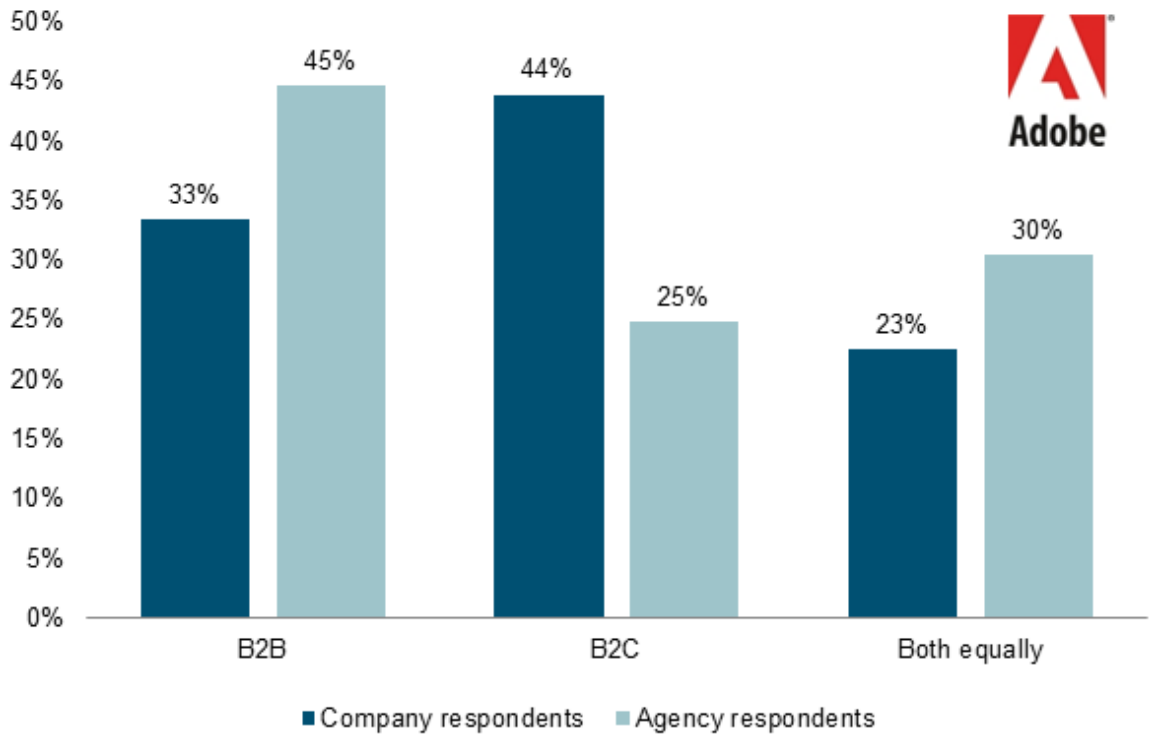


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Respondents: 247

Company respondents were most likely to be B2C (44%), with a third of companies classing themselves as B2B (33%). On the agency side, just under half said they had a B2B focus (45%), with 30% saying that had an equal B2B/B2C focus.

Figure 23: Is your business focused more on B2B or B2C?



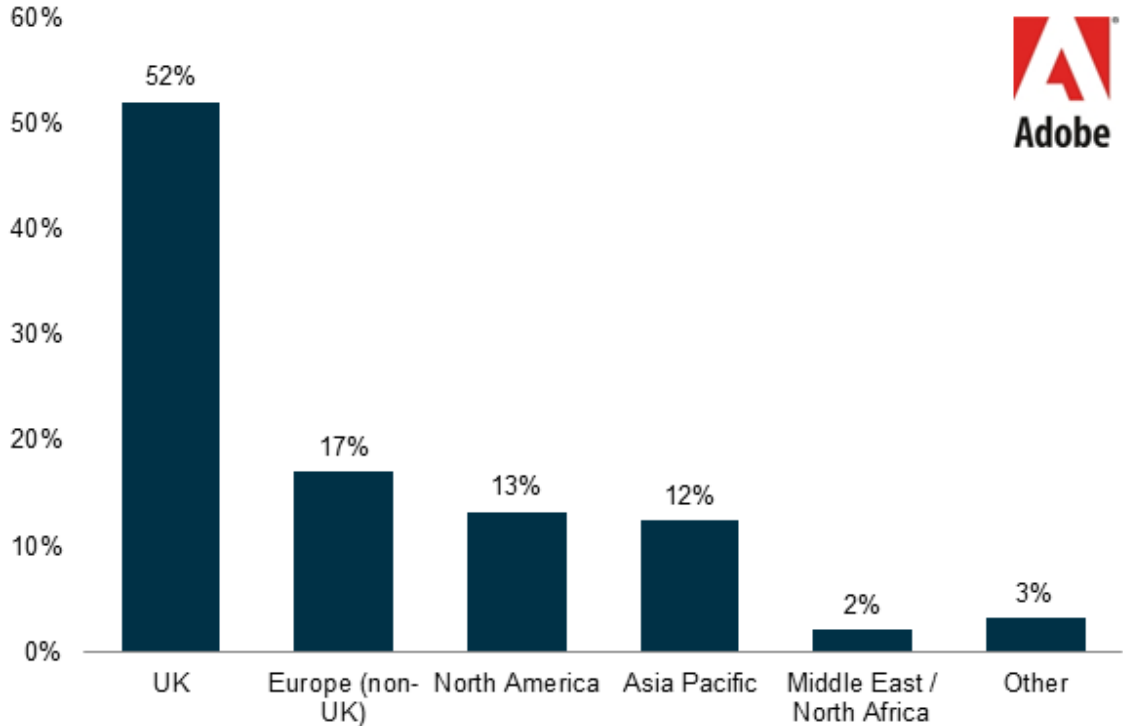
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*Company respondents: 239
Agency respondents: 197*

9.2. Geography

Just over half (52%) of respondents are based in the UK. Almost a fifth (17%) are based in Europe (non-UK), 13% in North America and 12% in Asia Pacific. Other regions represented include the Middle East, South America and Africa.

Figure 24: In which country/region are you (personally) based?



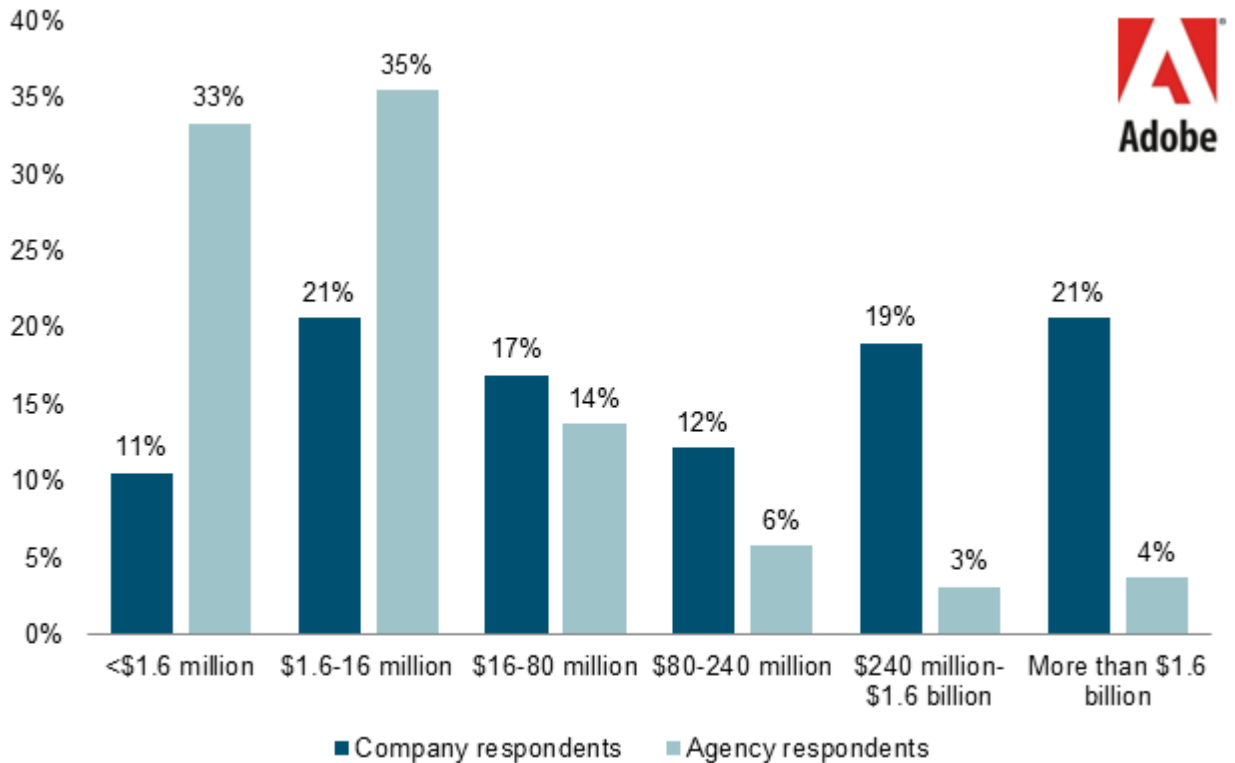
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Respondents: 723

9.3. Company revenue

The chart below shows the annual revenue of responding companies. At the upper end of the scale, more than half of respondents have annual revenues of more than \$80 million. The majority of agencies have revenues of less than \$16 million.

Figure 25: What is your annual company revenue?



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Company respondents: 189
Agency respondents: 180