Quarterly Digital Intelligence Briefing

The CX Challenge
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As I was reading this report, I was struck by the comment, “Good design is the art of making the complicated simple”. That’s a great way to sum up the value of design, but as I look at the report findings, I can’t help feeling that it also sums up the customer experience challenge: to take something complicated and make it simple and relevant.

Customer experience is clearly a hot topic. For the last two years, our annual global Digital Trends reports, produced in partnership with Econsultancy, have found that customer experience is the single most exciting opportunity for marketers, ahead of other themes such as big data, social and content marketing.

Unfortunately, exciting doesn’t always equal easy. The complexities of customer experience are significant, and it’s more than just getting the hang of new technologies. By definition, effective customer experience requires a high degree of personalisation and this introduces a new level of complexity for marketers.

This report explores these issues and reveals that delivering a consistent and relevant customer experience across all touchpoints is indeed challenging. At the same time, it shows that businesses are stepping up to that challenge and finding success.

For example, while 50% of respondents claimed their companies were not advanced when it comes to delivering on customer experience, the other 50% stated they’re doing well. In fact, 95% have at least started to address this area.

The report really digs into the struggles and successes of modern customer experience. Barriers to success range from the complexity of tracking customer preferences to the way a company is organised.

In addition, the report explores the ways in which marketers are using new and emerging technology to create experiences. It then looks at the rising role of design and creativity in this exciting field.

We’ve filtered the data in a variety of ways to allow you to see these trends from different perspectives. One perspective I find particularly useful is that of customer experience maturity. It’s fascinating to see how companies who are finding success with customer experience respond in comparison to those that are just beginning.

For example, in the more advanced companies, customer experience is embedded throughout the organisation with strong collaboration and shared goals across teams. That’s not the case in the more immature companies.

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Customer experience is complicated. There are real challenges to getting it right. But as this report shows, it can be done.

I hope you find these insights meaningful, and that you find success delivering your own best-in-class customer experience.

John Travis
VP, EMEA Marketing
Adobe
The vast range of digital and offline touchpoints through which consumers interact with brands is a sobering reminder of the complexity of the customer experience.

As shown in Figure 1, based on our global survey of digital and ecommerce professionals, organisations are most likely to treat the desktop and mobile web experience as central to the overall experience, very closely followed by email. Telephone support and retail outlets are the offline channels seen as most integral to CX.

But the efforts of organisations should not stop here. The best website in the world does not compensate for a shoddy smartphone app, a sub-standard in-store experience or a surly representative at the airport check-in desk.

Thirteen different touchpoints are regarded by at least half of client-side survey respondents as being central to the customer experience, and only three are cited as central by a minority. Less than half of companies using SMS, messaging apps and mail order catalogues treat these touchpoints as integral to CX.

Figure 1: Which touchpoints does your organisation treat as a central part of the customer experience (CX)?

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Company (‘client-side’) respondents: 912

Methodology note: Survey respondents also had a ‘not relevant’ option for each touchpoint.
While organisations clearly need to prioritise their efforts, the truth is that every customer channel or touchpoint should be regarded as important for the overall experience, whether the desktop website, a mail order catalogue or communication through SMS.

Much more easily said than done. A range of barriers preventing companies from improving the customer experience are shown in Figure 2, with ‘complexity’ emerging as the single most widely cited obstacle to success in the eyes of client-side respondents. This is clearly not the only problem for companies, with organisational structure, lack of overall strategy, lack of resources and difficulty unifying different sources of customer data all cited as a top-three barrier by at least 30% of respondents.

Supply-side respondents (mainly those working for agencies and consultancies) are most likely to point to a lack of overall strategy as the greatest impediment to success. Almost half (45%) of these respondents cite a strategic void as one of the three largest obstacles, and this is evidently something which is easier to see from the outside in.
Mid-market organisations point to a lack of strategy as the principal obstacle

Figure 3 shows the pecking order of barriers broken down by size of company, based on annual revenue. For the largest companies (with a turnover of more than £1bn) it is no surprise to see that complexity is the most significant barrier, with organisational structure also prominent.

The smaller companies (below £150m in revenue) are most likely to point to a lack of resources while mid-market organisations (defined here as those with between £150m and £1bn in earnings) point to a lack of strategy as the principal obstacle.

These findings pointing to a widespread lack of strategy are consistent with a separate piece of research conducted by Adobe which found that half of all companies have not yet defined an overarching customer experience strategy that goes beyond marketing and involves different business units. More than a third of respondents (36%) said they saw a need for action in their company to define a holistic customer experience strategy, according to that same piece of research.

Figure 3: Barriers to improving the customer experience (by company size)

<table>
<thead>
<tr>
<th>Complexity of customer experience / number of different touchpoints</th>
<th>Small companies (revenue below £150m)</th>
<th>Mid-market companies (revenue between £150m and £1bn)</th>
<th>Large companies (revenue over £1bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>32%</td>
<td>30%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Organisational structure</td>
<td>29%</td>
<td>35%</td>
<td>48%</td>
</tr>
<tr>
<td>Difficulty unifying different sources of customer data</td>
<td>29%</td>
<td>35%</td>
<td>48%</td>
</tr>
<tr>
<td>Lack of overall strategy</td>
<td>27%</td>
<td>16%</td>
<td>23%</td>
</tr>
<tr>
<td>Lack of resources</td>
<td>20%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>Lack of budget</td>
<td>20%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Focus on short-term profit</td>
<td>20%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Difficulty finding the right staff</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Lack of buy-in at the top of the organisation</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Lack of business case for improvement</td>
<td>16%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Poor staff training</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Company respondents: 887

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The verbatim answers to an open-ended survey question about the specific challenges around customer experience gave particular emphasis to the on-going battle with data, with companies struggling to bring together customer-related information sitting in different business departments and sometimes feeling trapped by software platforms and databases which are no longer fit for purpose.

The challenge of ‘systems’ is writ large in the tag cloud and is particularly pertinent for large and sprawling companies trying to unify their customer experience initiatives across the business.

‘Management’ also features prominently in responses, with this often referring to the difficulty of motivating people and coordinating teams and staff across different grades of seniority.

**Figure 4: Are there any specific challenges you face around customer experience?**

Methodology note: The size of the words indicates the frequency of mentions.
Specific challenges organisations are facing around cross-channel campaign management

Survey respondent views

“Unifying data, joining brand experience and overall consumer experience.”

“Stringent corporate and operation policy, bureaucratic organisational structure makes change slow and difficult, not willing to take risks, technology baggage from legacy systems makes it difficult to integrate customer and operational data.”

“Lack of centralised and unified data.”

“A cohesive view of back-office systems and how they need to support customer-facing systems. Creating customer insights based on offline and online data together.”

“Lack of group ownership of strategy, lack of accountability for each department. Uniting disparate departments, with different objectives, planning and budget processes.”
Orienting around the customer is a job that transcends marketing as a department and expands it as a discipline. It’s not one goal but many, each with demands for new processes, capabilities and technology.

Over several years and many studies there are two central underlying truths that can’t be ignored. First, that managing the customer experience is not easy. Second, that it’s worth the trouble.

Although many industries and individual companies have embraced customer experience as a tent pole for their strategy, it is very much a work in progress.

Further, that progress is often interrupted by leadership changes or quarterly emergencies. A focus on customer experience can be challenging from an organisational perspective because investment of time and budget is immediate, but their dividends are inherently long-term.

Companies in the survey fall into a rough bell curve with small percentages at the edges being very advanced or highly immature (Figure 5). Most companies fall into a middle that is bifurcated by the bright line between those where strategy and technology are aligned and those companies who are still taking a tactical, ad-hoc approach.

Figure 5: How do you rate your company (or your clients) in terms of customer experience maturity?

<table>
<thead>
<tr>
<th>Customer Experience Maturity</th>
<th>Company respondents</th>
<th>Agency respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very advanced – our / their strategy and technology are well aligned around CX to successful effect</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Quite advanced – our / their strategy and technology are aligned but CX is not fully embedded yet</td>
<td>42%</td>
<td>35%</td>
</tr>
<tr>
<td>Not very advanced – we / they have some ad hoc tactical initiatives but no real CX strategy or tech capability</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>Immature – we / they haven’t even started on this journey</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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Company respondents: 937
Agency respondents: 704
Readers outside of North America might be surprised to see comparatively low scores for the region (Figure 6), given that much of the innovation and technology in the area of customer experience has come from the giants of Silicon Valley.

The issue may be one of perspective more than capability. Respondents in the US have been competing in an environment where the drumbeat of customer centrism has been resounding for some time. Given that capabilities at larger and mid-market companies in the region rival or surpass overseas competitors, it appears that perhaps North American marketers may have set a higher bar for their organisations.
Figure 7 shows the level of perceived customer experience maturity broken down by company size. It can be seen that mid-market companies are lagging behind their smaller and larger counterparts.

Only 44% of mid-market companies believe they are ‘very’ or ‘quite’ advanced in terms of CX maturity, versus 49% for smaller companies and 60% of the largest companies.

While intuitively the greater geographic spread of locations and number of divisions should make it hardest at the largest companies to ensure a consistent experience across all touchpoints, it is evident that it is actually the mid-market companies who are more likely to be behind the curve.

While there are likely to be notable exceptions, a hypothesis is that these organisations are too large for a customer-centric culture to easily take hold but too small for the required investment in world-class user experience teams and technology.

Figure 7: Customer experience maturity by company size

<table>
<thead>
<tr>
<th>Maturity Level</th>
<th>Small companies (revenue below £150m)</th>
<th>Mid-market companies (revenue between £150m and £1bn)</th>
<th>Large companies (revenue over £1bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very advanced – our strategy and technology are well aligned around CX to successful effect</td>
<td>7%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Quite advanced – our strategy and technology are aligned but CX is not fully embedded yet</td>
<td>42%</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Not very advanced – we have some ad hoc tactical initiatives but no real CX strategy or tech capability</td>
<td>37%</td>
<td>39%</td>
<td>4%</td>
</tr>
<tr>
<td>Immature – we haven’t even started on this journey</td>
<td>5%</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Econsultancy / Adobe Quarterly Digital Intelligence Briefing  

Company respondents: 937
Responsibility for customer experience is most likely to reside with a mixture of departments

Looking at the relative maturity of various industries and customer experience management, we see opportunity for some and a warning for others (Table 1). It can be argued that consumer expectations are set by the companies that excel in CX, but sector comparisons will always be the first to drive investment and urgency.

There’s a competitive advantage for the manufacturing or financial services company that pushes to the forefront of customer experience. We’ve seen that those organisations that rely on traditional sales relationships or their unique product set can be rapidly upended, because their complacency results in processes and experiences that frustrate customers. A focus on CX can protect such companies from a similar fate while simultaneously putting pressure on their competition.

Sector comparison (company respondents)

<table>
<thead>
<tr>
<th>Table 1: How do you rate your company in terms of customer experience maturity?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Charities, Government and Non Profit</td>
</tr>
<tr>
<td>Consumer Goods</td>
</tr>
<tr>
<td>Financial Services</td>
</tr>
<tr>
<td>Manufacturing</td>
</tr>
<tr>
<td>Media</td>
</tr>
<tr>
<td>Professional Services</td>
</tr>
<tr>
<td>Retail</td>
</tr>
<tr>
<td>Technology</td>
</tr>
<tr>
<td>Travel and Leisure</td>
</tr>
</tbody>
</table>

In sectors such as technology or travel where the focus on CX is already intense, this table should act as motivation for underperforming companies. Historical protections such as loyalty programmes, long-term warranties, and even brand affinity are not as effective at keeping customers in line as they were in the pre-digital age; switching costs in most areas are dropping and the speed of competitors’ responses is only increasing.

The great challenge of customer experience is that it must involve the entire organisation to be practised at a high level. After all, the customer’s experience will inevitably be affected by everyone from a service rep to the CEO and by decisions driven by finance and procurement just as surely as those from the product team or marketing.
At the same time a focus on customer experience can’t be expected to occur organically throughout the organisation. That spark must come from somewhere, very often marketing or new executive leadership. But once the fire is lit, it must spread or customer experience will inevitably suffer at the hands of competing priorities from other parts of the organisation.

**Figure 8: Responsibility for customer experience by company size**

- A mixture of different departments: 29% (Small), 34% (Mid-market), 27% (Large)
- The whole organisation: 17% (Small), 15% (Mid-market), 20% (Large)
- Dedicated customer experience team: 8% (Small), 13% (Mid-market), 19% (Large)
- Marketing department: 19% (Small), 18% (Mid-market), 18% (Large)
- Web development: 4% (Small), 3% (Mid-market), 3% (Large)
- Operations department: 1% (Small), 1% (Mid-market), 1% (Large)
- An outside agency / consultancy: 1% (Small), 1% (Mid-market), 1% (Large)
- Other: 2% (Small), 3% (Mid-market), 2% (Large)
- Nowhere (no-one has responsibility): 6% (Small), 8% (Mid-market), 11% (Large)

It can be seen from **Figure 8** that responsibility for customer experience is most likely to reside with a mixture of different departments, and this is most pronounced for mid-market companies. This split by company size also shows that the largest companies are most likely to have a dedicated CX team owning this, while the smallest tier of companies say it falls to the whole organisation.
In *Figure 9* we can see that there is a relationship between a holistic organisational approach to customer experience management and ultimate success.

While there is no one infallible path to effective customer experience management, when we compare the ownership of CX at those companies who rate themselves as ‘quite’ or ‘very’ advanced against the rest (‘not very advanced’ or ‘immature’), sharp differences emerge.

Those advanced companies are more likely to describe customer experience as embedded throughout the organisation or to have a dedicated CX team, and less likely to see it siloed in marketing or to have no real ownership.

Maturity in CX is not a reflection of single initiatives in product technology or process. Those will be a constant within the larger strategy, and can only be truly effective if they’re implemented by an organisation that embraces the idea that every department team and individual is responsible for the customer relationship.

The open-ended quotes on the next page are from those who said that responsibility for CX resides with a mixture of departments, with the aim of getting a more nuanced view of how responsibility is allocated.

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**Figure 9: Responsibility for customer experience by level of CX maturity**

- **The whole organisation**: 33%
- **A mixture of different departments**: 29%
- **Marketing department**: 14%
- **Dedicated customer experience team**: 14%
- **Web development**: 6%
- **Operations department**: 5%
- **An outside agency / consultancy**: 3%
- **Other**: 3%
- **Nowhere (no-one has responsibility)**: 3%

- ■ Company respondents who rate themselves as advanced in terms of customer experience maturity
- ■ Company respondents who rate themselves as ‘not very advanced’ or ‘immature’ in terms of customer experience maturity

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Respondents: 941
How is this mixture of departments decided?
Survey respondent views

“There are a number of teams who focus solely on CX, but take different slants, e.g. a team who measure CX for call centres and improve experience, sit within the call centre team.”

“The decision was made by the executive team.”

“It's a collaborative effort. It gets fed down from our managing director, then interpreted by our marketing, retail and VM departments.”

“It is a well-established norm rather than something specified within company policy.”

“Some individuals from different departments recognise the importance of good CX and raise this in the business, this is mainly driven out of the CRM team.”

“Given we see it as an end-to-end functionality, different departments are responsible for different areas along that funnel.”

“It falls across two broad capabilities: channels and customer. These have further sub-departments, with CX spanning many of these.”
Mobile excellence in the age of context

According to Adobe’s Digital Index, mobile accounts for 50% to 70% of all consumer interactions with brands. The top 20% of sites analysed by Adobe have already passed the tipping point where more than half of their traffic is mobile. As highlighted in Adobe’s Mobile Benchmark research: “It is not a question of if or even when, but rather how do we become mobile-first, if not mobile-only.”

Although mobile’s footprint has been increasing at an impressive speed, becoming an integral part of consumers’ lives, separate research published earlier this year by Econsultancy and Adobe showed that only a minority (29%) of marketers surveyed view mobile activities as being central to their businesses and how they engage with customers.

Figure 10 shows that organisations are less mature when it comes to the mobile customer experience specifically, with only around a third (35%) regarding themselves as ‘quite advanced’ and a further 6% claiming to be ‘very advanced’.

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Regional comparison

**Figure 11: How do you rate your company in terms of mobile customer experience excellence?**

- Immature – we haven’t done anything to improve the mobile customer experience
- Not very advanced – we have basics in place but lagging behind
- Quite advanced – there are many positive aspects to the mobile experience but it still needs work
- Very advanced – the mobile CX is a proven asset for our brand which differentiates us

Europe-based respondents are most likely to regard their companies as advanced, with two in five (42%) saying that’s the case (**Figure 11**).

As was the case with customer experience maturity in Section 3, mid-market companies are least likely to claim maturity in the realm of mobile. Only 34% say they are ‘very’ or ‘quite’ advanced compared to 40% of the smaller companies and almost half of the largest companies (49%).

Company respondents: 827
Only 6% of organisations regard themselves as ‘very advanced’ in terms of mobile CX

As seen in Table 2, media companies claim to be the most mature when it comes to the mobile customer experience, with 59% saying they are ‘very’ or ‘quite’ advanced. The sectors most likely to lag behind are charities/non-profit, manufacturing and professional services.

We also asked how respondents rate their business sector for mobile customer experience generally, compared with their own companies. Respondents generally feel that their own companies are in line with the sector average.

More than half of respondents (51%) agree that the mobile experience increasingly defines their brand, while more than two-thirds (69%) say they focus on the cross-device customer experience (Figure 13). Organisations who rate themselves as advanced in terms of mobile customer experience are nearly twice as likely than the rest to focus on the cross-device customer experience: the vast majority (90%) agree with this statement, compared to 56% of those who say they’re ‘not very advanced’ or ‘immature’.
Sector comparison (company respondents)

**Table 2: How do you rate your company in terms of mobile customer experience excellence?**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Very advanced</th>
<th>Quite advanced</th>
<th>Not very advanced</th>
<th>Immature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charities, Government and Non Profit</td>
<td>0%</td>
<td>19%</td>
<td>64%</td>
<td>17%</td>
</tr>
<tr>
<td>Consumer Goods</td>
<td>4%</td>
<td>42%</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>6%</td>
<td>35%</td>
<td>46%</td>
<td>13%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2%</td>
<td>21%</td>
<td>49%</td>
<td>28%</td>
</tr>
<tr>
<td>Media</td>
<td>10%</td>
<td>49%</td>
<td>30%</td>
<td>11%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>4%</td>
<td>30%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Retail</td>
<td>5%</td>
<td>39%</td>
<td>48%</td>
<td>8%</td>
</tr>
<tr>
<td>Technology</td>
<td>7%</td>
<td>42%</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Travel and Leisure</td>
<td>9%</td>
<td>44%</td>
<td>45%</td>
<td>2%</td>
</tr>
</tbody>
</table>

The mobile experience is increasingly about ‘fulfilling a specific need at a particular moment in time’, with almost three-quarters (74%) of respondents agreeing with this statement (**Figure 13**). Mark Asher, Head of Market Intelligence & Strategy at Adobe, aptly summarised the value of context: “The circumstances that shape a customer’s experience, both digitally and physically, can now be measured and moulded to create an individual encounter that is optimised for that particular moment.”

Contextual awareness has long been hailed as the untapped opportunity in mobile, but most organisations have yet to make significant progress in this area. While many recognise the importance of meeting contextual needs in real time, the ability to do so is heavily restricted by a lack of granular understanding of customer actions and behaviours (both at a group and individual level).

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5 https://www.linkedin.com/pulse/context-critical-mark-asher
Being able to provide a mobile experience that works seamlessly along experiences provided in other channels while remaining tuned to the customer’s device and context requires a great deal of effort and constant tuning. In the words of one survey respondent, it basically boils down to “satisfying the consumer’s mobile context with thoughtful functionality”.

Retailers have been the first to tap into contextual marketing, particularly when it comes to using mobile to influence or aid purchase decisions further upstream in the customer’s journey (the so-called ‘zero moment of truth’).

For example, Walmart’s mobile app is designed to switch to a ‘store mode’ when a customer’s smartphone connects to the in-store Wi-Fi. This transition means a change in functionality, from browsing and list creation to assistance with finding the location of your shopping list items, monitoring basket value or paying.
The value of contextual marketing lies at the intersection of mobile and data

Figure 14: Please indicate whether you agree or disagree with the following statements.

- We focus the mobile experience on prospects as well as existing customers: 30% Strongly agree, 32% Somewhat agree, 22% Neutral, 10% Somewhat disagree, 6% Strongly disagree.
- The ubiquity of mobile has increased our ability to merchandise effectively: 28% Strongly agree, 36% Somewhat agree, 28% Neutral, 5% Somewhat disagree, 9% Strongly disagree.
- Location-based services are integral to effective personalisation: 25% Strongly agree, 34% Somewhat agree, 28% Neutral, 8% Somewhat disagree, 5% Strongly disagree.
- We use mobile to provide a link between digital and physical worlds: 25% Strongly agree, 31% Somewhat agree, 24% Neutral, 14% Somewhat disagree, 6% Strongly disagree.
- We work to engineer mobile moments which reflect well on our brand: 20% Strongly agree, 39% Somewhat agree, 22% Neutral, 11% Somewhat disagree, 8% Strongly disagree.
- We can identify customers at physical locations using their digital footprint: 9% Strongly agree, 21% Somewhat agree, 29% Neutral, 16% Somewhat disagree, 25% Strongly disagree.

Apple also tries to augment the retail experience through the use of a similar in-store mode – for example, checking upgrade eligibility and current trade-in value of the customer’s iPhone if the beacon senses that the customer is at the iPhone display table.

The value of contextual marketing lies at the intersection of mobile and data, but in order to be able to exploit the convergence of these two areas, organisations need to view mobile as a behaviour rather than merely a standalone channel or technology.

Encouragingly, as seen in Figure 14, nearly three in five companies say that location-based services are integral to effective personalisation (59%). A similar proportion (56%) indicate they use mobile to provide a link between the digital and physical worlds (Section 5 provides more details on how organisations can bridge the gap between the two).
Figure 15: What do you think is the most important component of a great mobile experience?

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Methodology note: The size of the words indicates the frequency of mentions.
Connecting the physical and digital worlds is often the last (and hardest) step for marketers aiming to achieve a single customer view. This single customer view is key to a consistent experience, and it is generally accepted that the more consistent and relevant the experience, the more likely the journey is to end in a purchase.

Once the problem of tracking across devices has been solved (through deterministic and probabilistic methods of matching devices to individuals), marketers must then make the leap between targeting an online customer and continuing that experience in a store. The challenge of bridging this gap has been met through the use of portable devices such as tablets and smartphones, and giving customers reason to use and engage with a brand while in their store.

Social logins, mobile device IDs, digital receipts and loyalty programmes are all examples of ways in which marketers can match a digital consumer to a physical one, and hence improve their experience. In an open question, we asked respondents how they use mobile to bridge the digital and physical. Though many have not yet begun to use mobile in this way, others were using geolocation with personalised vouchers, stock checks via mobile sites and apps, click and collect via mobile, and QR codes.

**Figure 16: Do you (or your clients) use any of the following digital tactics to enhance the on-site physical experience?**

<table>
<thead>
<tr>
<th>Digital tactic</th>
<th>Company respondents</th>
<th>Agency respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital signage / interactive displays</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>Free Wi-Fi</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Provision of tablets for customer-facing employees</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Kiosks</td>
<td>23%</td>
<td>33%</td>
</tr>
<tr>
<td>Beacons (e.g. iBeacons)</td>
<td>10%</td>
<td>19%</td>
</tr>
<tr>
<td>Virtual reality booths</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Virtual fitting rooms</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Company respondents: 333**  
**Agency respondents: 497**
Once in-store, digital is also being used to improve the experience for customers, personalising, engaging and improving efficiency. *Figure 16* shows the use of digital tactics in-store to enhance the on-site physical experience, showing that digital signage and interactive displays are the most-used tactic according to both companies and agencies (60% and 58% respectively). This is fairly unsurprising given their ease of implementation and relative impact on the store experience.

Almost 50% of both companies and agencies are now providing free Wi-Fi in stores. However, its use by consumers has yet to become widespread according to separate research. A Kantar Retail study from January 2015[^6] found that only 22% of consumers felt that retailers should provide Wi-Fi in store and only 16% frequently used their smartphones in store.

While the customer experience associated with the use of in-store Wi-Fi has been cited as a barrier to its use by customers, the online research stage of the customer journey has undoubtedly become an important part of the process. So it is likely that as in-store Wi-Fi improves, its uptake by both stores and customers will increase.

The challenge presented by bridging the offline and online gap is represented in Figure 17, with 41% of respondents indicating that they cannot identify customers at physical locations using their digital footprint. Less than 10% are sure they can do this (those who ‘strongly agree’ with that statement). However, respondents were more optimistic about their ability to track and attribute across digital and physical touchpoints, with 45% agreeing that they are able to do this.

With the ability to personalise generally regarded as essential to providing a ‘good’ customer experience for consumers, it is encouraging that survey respondents are aware of the need to target and personalise offline experiences in addition to those online. A quarter of respondents (25%) strongly agreed that location-based services are integral to effective personalisation and a further 34% ‘somewhat’ agreed.

Despite this, Figure 16 shows only 10% of company respondents are using beacons, a key location-based technology. In the open question mentioned previously, on how respondents are using mobile to bridge the digital and physical worlds, very few mentioned location-based targeting. Beacons have been a hot topic for 2015, and while the industry has been eagerly discussing their promise in terms of personalising the in-store experience, obstacles such as Bluetooth signal absorption and customer opt-in could be slowing their widespread adoption.
Internet of Things and wearable tech

The Internet of Things (IoT) can be defined as the connection of physical objects to the internet, and thereby to each other and the environment. To facilitate this, electronics manufacturers are increasingly building into devices the ability to network and communicate.

As a result, there are some 40m devices now connected via the IoT in the UK alone, according to the communications regulator Ofcom. This is forecast to grow eight-fold by 2022, with hundreds of millions of devices carrying out more than a billion daily data transactions. Perhaps unsurprisingly, over 40% of companies agree it is an area they are already embracing, or planning to embrace (Figure 18).

As shown in Figure 19, respondents at the largest organisations are twice as likely as their counterparts at other companies to have embraced the internet of things. Companies at mid-market organisations are most likely to be thinking about endeavours in this area.

Figure 18: To what extent is your organisation / are your clients embracing the internet of things (i.e. connected devices)?

Figure 19: Respondents at the largest organisations are twice as likely as their counterparts at other companies to have embraced the internet of things.
The fact that the majority of companies see improved customer experience as a benefit of IoT (as seen in Figure 20) underlines the IoT’s potential to deliver new customer experiences, extending brand ecosystems. With its ability to deliver regular information to customers through wearables, smartphones or other devices, IoT can enable brands to participate in much wider aspects of consumers’ lives.

In the automotive sector, for example, high-end marques have been quick to implement IoT services. The latest Mercedes Benz range can communicate with Nest thermostats, adjusting temperatures as the driver returns home. SAP has also run a pilot with BMW which keeps drivers informed of nearby parking spots.
Just over half of companies are already including IoT initiatives as part of a documented strategy

The IoT also brings the potential for more data and insights about customers (according to 66% of companies). An example of this is Diageo’s Johnnie Walker Blue Label ‘smart bottle’ which can recognise the stages a customer is with the product. It can tell when the bottle has been opened, which acts as a trigger for sending cocktail recipes and exclusive content.

Another benefit is increased customer loyalty (53% of companies). The IoT has the ability to hold consumers within a brand environment, creating more streamlined, friction-free brand experiences by linking to other services. For example, Jawbone partnered with American Express, enabling its range of fitness trackers to be used as a contactless payments device.

Figure 20: What do you (or your clients) consider to be the benefits of the internet of things (i.e. connected devices) for your (or their) brand?

- Improve customer experience: 61% (Company), 58% (Agency)
- More data and insights about customers: 66% (Company), 58% (Agency)
- Increase customer loyalty: 44% (Company), 45% (Agency)
- More data and insights about products: 48% (Company), 46% (Agency)
- More targeted advertising: 45% (Company), 47% (Agency)
- New revenue streams (e.g. services or products): 41% (Company), 45% (Agency)
- Build brand ecosystem: 38% (Company), 37% (Agency)
- Other: 2% (Company), 1% (Agency)

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Company respondents: 515
Agency respondents: 393
Given the predicted growth in ownership of connected devices by 2022 (discussed earlier in this section) the timescale for more widespread adoption of the IoT as a clear marketing or customer experience strategy is unlikely to be very long. Positively, just over half of companies are already including it as part of a documented strategy (Figure 21).

When it comes to creating a strategy it means thinking about the end user first and foremost, considering the problems that IoT might be able to solve in consumers’ day-to-day lives. While there isn’t a recipe for success, it does come down to a mix of novelty, entertainment and most importantly, practicality.

The IoT is a logical evolution of telecoms, cloud-based computing as well as smart devices – essentially a combination of what we are currently using. The greatest error organisations can make is to overlook it entirely. The fact that 38% of companies are exploring potential opportunities in an ad-hoc way is therefore a positive development.

Innovations discussed earlier in the section will continue to raise consumer expectations. In the near future the IoT will be become accepted as a standard product feature. This will challenge existing practices and require organisations to think in a radically new way. But it will be imperative if brands are to differentiate and engage in this new connected world.
Please name or briefly describe any IoT examples which you think have been effective in improving customer experience.

Survey respondent views

“We have an industrial-based IoT ecosystem (Eco Struxture) that allows manufacturers to proactively and automatically adjust their processes based on motor control and other sensor data.”

“Retrofitting brick-and-mortar locations with IoT office management devices for a better customer and employee experience.”

“Many of my clients are manufacturers and are leading the way in embedding devices in products from air conditioning to lighting.”

“We do not use Internet of Things or wearable technology for CX but for brand awareness towards prospective employees and business prospects.”
Wearable technology should be seen as part of the IoT ecosystem, but is also an important trend in its own right. According to Econsultancy’s *Marketer’s Guide to Wearable Technology* report⁸, a comprehensive definition for wearable technology is difficult. Broadly, it is technology capable of calculating and processing information that can be worn, and allow hands-free benefits.

As a concept it offers huge potential, but ideas must be refined and prove their value in order to be brought into the workplace.

Just over half (54%) of companies are not yet considering wearable technology (*Figure 22*). However, a third (33%) of agency respondents report that their clients are thinking about its introduction, implying changes within organisations over the next few years.

*Figure 22: To what extent is your organisation / are your clients embracing wearable technology?*

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⁸https://econsultancy.com/reports/a-marketer-s-guide-to-wearable-technology/
Using wearable technology to improve customer experience is a key opportunity, according to 69% of companies (Figure 23). New ways to collect and transmit data will offer more chance to reach customers, and to tailor communications and brand interaction. By definition, wearable technology is carried with the user, meaning brands can communicate with consumers at times and in contexts they did not previously have access to. This access to the wider world of the consumer means the device can begin to seamlessly interact, serving many uses and purposes.

Just over half of companies and agencies (53% and 52% respectively) agree that more data and insights about customers will be an advantage of wearable technology, which directly impacts the previous statement. With improved data comes a clearer understanding of consumers. These more tailored views can directly feed into improving the customer experience. Data gathered via wearables can not only tell companies where and when customers interacted with their brand, but can also provide extra information, such as how the customer was feeling at that time.

Figure 23: What do you (or your clients) consider to be the benefits of wearable technology for your (or their) brand?
Brands can communicate with consumers at times and in contexts they did not previously have access to.

For two-fifths (40%) of responding companies, the potential to increase customer loyalty is appealing. Wearable technology has the ability to hold people within a brand ecosystem, as a device can generate on-going value and link to other services that people use when going about their normal day.

Almost three-fifths (57%) of agency respondents say clients with initiatives relating to wearable technology incorporate these as part of a documented strategy (Figure 24).

Wearable technology finding its way into the mainstream is necessitating a reaction from marketers, especially within technology-driven companies. The potential to engage with consumers on new platforms means that it’s an enticing prospect. By incorporating new developments into existing strategy, companies are equipping themselves to meet the demands of these new screens and ‘data-collecting’ devices.

Figure 24: Are your (or your clients’) initiatives relating to wearable technology part of a clear marketing or customer experience strategy?

Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 48
Agency respondents: 30
Please briefly elaborate on your wearable technology initiatives.
Survey respondent views

“One of our products and services integrates with the Apple iWatch.”

“Connect devices to our navigation app.”

“As a technology company we’re actively evaluating the uptake of customer connectivity through multiple devices and have initiatives in place to actively explore these opportunities.”

“We design and manage communications systems for motorcycle helmets.”

“We have an app designed for wearable watches – you can see your balance and make a quick transfer.”

“We have developed applications for use with wearable devices. This is an extension of our current software.”

“Capture consumer data and then provide high-level value services.”

“Smart sensors on products are a viable approach to wearables in our sector.”
Please name or briefly describe any wearable technology initiative or example from any business sector which you think has been effective in improving customer experience.

Survey respondent views

“Any new wearable devices with contactless – they’re so easy to use.”

“Medical field, technology helping people like GPS in car or walking.”

“iPad use in Specsavers stores allows customers to select glasses and opticians can specify exact fit and dimensions from a photo.”

“Wearable technology that helps with health or exercise (like FitBit) is having the greatest impact.”

“Booking.com has created an Apple Watch app. Mainly to make sure they’re seen as a company at the forefront of new technology and maximising their customer reach and accessibility.”

“Nike+ was close but was killed and never reached its potential. Samsung is coming close.”

“Uber’s Apple Watch app is basically exactly what an Apple Watch app needs to be used for.”

“The banking sector in our market seems to be making good progress here.”
Good design is the art of making the complicated simple, in the knowledge that customers don’t expect to notice differences across brand touchpoints. Digital ubiquity is forcing organisations to rethink their strategy and how they organise themselves to respond to demands from customers and prospects to deliver more meaningful and personalised experiences.

Design-driven organisations focus on user experience, customer engagement and human connectivity, whether that is face-to-face or screen-to-screen.

While companies cannot control customer experiences per se due to the fact that experiences involve customers’ emotions and subjective points of view, they can control touchpoints which can be ‘identified, crafted and integrated’. The task of doing this requires a clear vision, collaboration and co-ordination across teams and departments that in many cases, may traditionally have worked independently of each other.

Delivering a great customer experience requires marketing, customer service, sales, product design and perhaps retail partners to work together in unison.

The challenges of creating a great customer experience extend from the tactical to the strategic, from remaking processes to encouraging innovation, and from building new skills to integrating an array of technologies. It follows logically then that for many organisations, the goal of turning customer experience (CX) into a competitive advantage may mean redesigning the entire organisation.

Some companies don’t make design a priority because it can be difficult to measure and define within the business strategy. Yet, there is some evidence to suggest that investing in design can support the creation of sustainable competitive advantage. For example, recent research by the Design Management Institute, mentioned in the foreword to this report, found that design-led publicly traded companies have maintained significant stock market advantage, outperforming the S&P index by 228%.

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Poor organisational design may manifest itself in siloed organisations which can result in a lack of co-ordination among functions, a failure to share ideas, slow decision-making and of course an inability to respond to customers in an appropriate time. It is important that organisations do not simply layer digital networks on top of old infrastructure.

When respondents were asked to describe whether their organisations were design-driven or not (Figure 25), a majority indicated that they are either ‘not really’ design-driven (40%) or ‘not at all’ design-driven (11%).

Just under half (49%) of companies agree they are ‘definitely’ or ‘somewhat’ design-driven, versus 51% who say this is not the case. When companies were asked whether they were going to increase their design budgets as part of their efforts to improve customer experience (Figure 30), only 32% of respondents said they would increase their budgets.
By drilling down and examining responses based on geography, it is clear that companies in North America are significantly more likely than their European and APAC counterparts to say they are ‘definitely’ design-driven (Figure 26).

Respondents at mid-market companies are significantly less likely than their peers at smaller and larger organisations to say that they are design-driven in their approach to customer experience (Figure 27). They are also less likely to say their companies are increasing their budgets in this area.

**Regional comparison**

**Figure 26: Would you describe your company as a design-driven organisation?**

<table>
<thead>
<tr>
<th></th>
<th>Europe</th>
<th>North America</th>
<th>Asia Pacific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, definitely</td>
<td>12%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Yes, somewhat</td>
<td>40%</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>No, not really</td>
<td>36%</td>
<td>33%</td>
<td>39%</td>
</tr>
<tr>
<td>Not at all</td>
<td>12%</td>
<td>18%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Good design is the art of making the complicated simple
Figure 27: Extent to which organisations are design-driven, by company size

Companies in the technology sector are most likely to need to spend more time on the design of their products and services. In fact, due to the pace of technological change, these companies may need to maintain competitive advantage by iterating faster than their competitors. It is not surprising then that when broken down by sector, respondents from technology companies are more likely to describe themselves as design-driven organisations (Table 3).

As revealed by recent Econsultancy research focusing on retailers, more than half of respondents see customer service and experience as the primary means of competitive differentiation over the next five years[11]. Perhaps unsurprisingly then, 60% of retail respondents indicate that they are ‘definitely’ or ‘somewhat’ design-driven, significantly above the average.

At the other end of this spectrum, only a small number of professional services, financial services and charities identify themselves as being design-driven organisations. One might hypothesise that these are sectors that have operated largely in the same way for decades. That does not mean that organisations in these sectors do not need to become more design-focused. In fact, for professional services and financial services, revolutions in computing power and digital connectivity mean that the products and services of these kinds of organisations run the risk of being commoditised if they don’t reorient themselves around their customers.

For many years professional services firms including accountants, management consultants and legal firms were in a strong position as they had specialist knowledge and expertise that their clients required and so they could choose how they wanted to interact and indeed charge premium prices. Some of these kinds of services have been disrupted by digital technology meaning that work can be automated or offshored.

In banking, many consumers see online, mobile and other digital channels as being seamlessly integrated into their real world. Many people don’t even visit branches anymore. As digitisation takes over, retail banks that have layered digital over their core branch component may need to change their model and move digital to the core. This does not mean that banks need to get rid of branches but it could mean that branches could be organised differently. For example, instead of having tellers to manage transactions, they can focus more staff efforts on advising customers about financial products.

### Sector comparison (company respondents)

#### Table 3: Would you describe your company as a design-driven organisation?

<table>
<thead>
<tr>
<th>Sector</th>
<th>Very advanced</th>
<th>Quite advanced</th>
<th>Not very advanced</th>
<th>Immature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charities, Government and Non Profit</td>
<td>4%</td>
<td>16%</td>
<td>63%</td>
<td>17%</td>
</tr>
<tr>
<td>Consumer Goods</td>
<td>17%</td>
<td>42%</td>
<td>34%</td>
<td>7%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>7%</td>
<td>37%</td>
<td>39%</td>
<td>17%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>8%</td>
<td>51%</td>
<td>33%</td>
<td>8%</td>
</tr>
<tr>
<td>Media</td>
<td>18%</td>
<td>37%</td>
<td>39%</td>
<td>6%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>8%</td>
<td>32%</td>
<td>44%</td>
<td>16%</td>
</tr>
<tr>
<td>Retail</td>
<td>20%</td>
<td>40%</td>
<td>34%</td>
<td>6%</td>
</tr>
<tr>
<td>Technology</td>
<td>27%</td>
<td>42%</td>
<td>26%</td>
<td>5%</td>
</tr>
<tr>
<td>Travel and Leisure</td>
<td>11%</td>
<td>29%</td>
<td>53%</td>
<td>7%</td>
</tr>
</tbody>
</table>
The majority of respondents from the charity, government and non-profit sector (80%) do not describe themselves as design-driven. This may be due to the fact that they do not operate in the same kind of competitive environment that more commercial organisations do. That is not to say that these kinds of organisations do not attempt to innovate.

For example, the UK Government formed the Government Digital Service (GDS) in 2011. GDS is an agency intended to help government make digital services and information simpler, clearer and faster by focusing on end users rather than government departments. GDS has even published a set of design principles and examples of how they are being applied on its website\(^{12}\).

Figure 28: Extent to which respondents describe themselves as design-driven, by level of CX maturity

Only 37% of companies have the processes and collaborative workflows required to achieve a design advantage

Figure 28 shows clearly that companies who regard themselves as advanced in terms of customer experience maturity are significantly more likely to say they are design-driven in their approach.

Engineering good customer experiences requires redeveloping systems and procedures which also involves reconfiguring IT and marketing technology infrastructure. When respondents were asked if they have ‘the people they need to engineer good customer experiences’, only 44% agreed (Figure 30).

Further, only 37% of respondents say they have the processes and collaborative workflows required to achieve a design advantage.

Just over two-thirds (67%) of respondents indicate that creativity is valued in their clients’ organisation. According to a study from Forrester on how creativity impacts business results, companies that foster creativity enjoy greater market share by a factor of 1.5 when compared to their less creative counterparts, and those companies that embrace creativity achieved revenue growth.13

Figure 29: Is your company / are your clients increasing or decreasing design budgets as part of its / their efforts to improve the customer experience?

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Companies which value design and creativity are much more likely to be leaders in customer experience

It can be seen from Figure 31 that respondents at organisations which are at the mature end of the CX spectrum are significantly more likely to work in companies where creativity is valued.

Indeed, across the spectrum of statements, it can be seen that those who are more advanced at CX are much more likely to agree than their counterparts, ranging from a consistent approach to design through to having the processes, workflows and people to achieve a design advantage.

Curiously, while over 80% of respondents treat desktop and mobile website experience as a central part of customer experience, only 40% say that their CMS facilitates a brand-enhancing digital experience. This is at least an improvement compared to 2014 and 2013 (Figure 32), but there are still a lot of companies out there battling with a sub-standard CMS.

Figure 30: Please indicate whether you agree or disagree with the following statements.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neutral</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creativity is highly valued within our organisation</td>
<td>29%</td>
<td>38%</td>
<td>18%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Design-driven companies outperform other businesses</td>
<td>23%</td>
<td>42%</td>
<td>26%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>We are investing in design to help differentiate our brand</td>
<td>18%</td>
<td>41%</td>
<td>20%</td>
<td>19%</td>
<td>6%</td>
</tr>
<tr>
<td>Our design approach is consistent across the digital and physical worlds</td>
<td>14%</td>
<td>36%</td>
<td>24%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>We have a consistent approach to design across the whole business</td>
<td>13%</td>
<td>35%</td>
<td>21%</td>
<td>22%</td>
<td>9%</td>
</tr>
<tr>
<td>We have the people we need to engineer good customer experiences</td>
<td>11%</td>
<td>33%</td>
<td>23%</td>
<td>23%</td>
<td>10%</td>
</tr>
<tr>
<td>We have the centralised assets we need to be consistent in our approach to design</td>
<td>11%</td>
<td>34%</td>
<td>26%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Our CMS facilitates a brand-enhancing digital presence</td>
<td>10%</td>
<td>30%</td>
<td>28%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>We have the processes and collaborative workflows we need to achieve a design advantage</td>
<td>10%</td>
<td>27%</td>
<td>27%</td>
<td>26%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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Company respondents: 781
We have the processes and collaborative workflows we need to achieve a design advantage.

We have the people we need to engineer good customer experiences.

We have the centralised assets we need to be consistent in our approach to design.

We have a consistent approach to design across the whole business.

Our CMS facilitates a brand-enhancing digital presence.

Design-driven companies outperform other businesses.

Creativity is highly valued within our organisation.

We are investing in design to help differentiate our brand.

Our design approach is consistent across the digital and physical worlds.

We have a consistent approach to design across the whole business.

We have the centralised assets we need to be consistent in our approach to design.

We have the people we need to engineer good customer experiences.

Our CMS facilitates a brand-enhancing digital presence.

We have the processes and collaborative workflows we need to achieve a design advantage.

Company respondents who rate themselves as 'quite' or 'very' advanced in terms of customer experience maturity.

Company respondents who rate themselves as 'not very advanced' or 'immature' in terms of customer experience maturity.

Figure 31: Proportion of companies agreeing with statements (by level of CX maturity)

<table>
<thead>
<tr>
<th>Statement</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design-driven companies outperform other businesses</td>
<td>38%</td>
<td>31%</td>
<td>38%</td>
</tr>
<tr>
<td>Creativity is highly valued within our organisation</td>
<td>56%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>We are investing in design to help differentiate our brand</td>
<td>54%</td>
<td>56%</td>
<td>62%</td>
</tr>
<tr>
<td>Our design approach is consistent across the digital and physical worlds</td>
<td>48%</td>
<td>50%</td>
<td>56%</td>
</tr>
<tr>
<td>We have a consistent approach to design across the whole business</td>
<td>39%</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>We have the centralised assets we need to be consistent in our approach to design</td>
<td>32%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>We have the people we need to engineer good customer experiences</td>
<td>36%</td>
<td>38%</td>
<td>42%</td>
</tr>
<tr>
<td>Our CMS facilitates a brand-enhancing digital presence</td>
<td>32%</td>
<td>34%</td>
<td>39%</td>
</tr>
<tr>
<td>We have the processes and collaborative workflows we need to achieve a design advantage</td>
<td>29%</td>
<td>31%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 781

Figure 32: 'Our CMS facilitates a brand-enhancing digital presence' – agree or disagree

Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 781

Company respondents 2015: 781

2014: 318 | 2013: 399
This Quarterly Digital Intelligence Briefing is based on an online survey of more than 2,200 marketing, digital and ecommerce professionals, carried out in August and September 2015.

A total of 2,252 respondents took part in the survey, including 56% marketing professionals from the client-side and 44% from the supply-side (including agency marketers, consultants and those working for technology vendors or other service providers).

The following charts provide further details on the profile of survey respondents.

**Figure 33: Which of the following best describes your company or role?**

- 44% Client-side (part of an in-house team)
- 56% Agency / vendor / consultant

**Figure 34: In which region are you based?**

- Europe: 74%
- North America: 8%
- Asia: 7%
- Australia / New Zealand: 7%
- Middle East: 2%
- Africa: 1%
- Other: 1%

Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 2,252
Respondents based in Europe

**Figure 35: In which of the following countries are you based?**

- **UK**: 39%
- **France**: 17%
- **Germany**: 11%
- **Italy**: 9%
- **Netherlands**: 3%
- **Sweden**: 7%
- **Switzerland**: 3%
- **Belgium**: 3%
- **Spain**: 4%
- **Austria**: 1%
- **Finland**: 1%
- **Denmark**: 1%
- **Norway**: 4%
- **Other**: 10%

**Econsultancy / Adobe Quarterly Digital Intelligence Briefing**

Company respondents: 869
Agency respondents: 735

Respondents based in Asia

**Figure 36: In which of the following countries are you based?**

- **Singapore**: 30%
- **India**: 30%
- **China**: 9%
- **Malaysia**: 6%
- **Thailand**: 6%
- **Philippines**: 4%
- **Indonesia**: 2%
- **Taiwan**: 6%
- **South Korea**: 2%
- **Other**: 11%

**Econsultancy / Adobe Quarterly Digital Intelligence Briefing**

Company respondents: 98
Agency respondents: 53
Figure 37: What best describes your position at your company?

- Manager: 45% (Company respondents), 19% (Agency respondents)
- Senior director / Director: 13% (Company respondents), 18% (Agency respondents)
- Analyst: 4% (Company respondents)
- Junior executive: 3% (Company respondents)
- Consultant: 6% (Company respondents), 18% (Agency respondents)
- Board level / business owner: 5% (Company respondents), 26% (Agency respondents)
- CMO / VP: 3% (Company respondents)
- CIO / CTO: 2% (Company respondents)
- Other: 10% (Company respondents), 7% (Agency respondents)

Figure 38: In which business function do you work?

- Marketing: 36% (Company respondents)
- Ecommerce: 13% (Company respondents)
- Design: 9% (Company respondents)
- IT: 9% (Company respondents)
- Web development: 7% (Company respondents)
- Analytics team: 4% (Company respondents)
- Operations: 3% (Company respondents)
- Content / editorial: 3% (Company respondents)
- Customer service: 2% (Company respondents)
- Sales: 2% (Company respondents)
- Separate mobile team: 1% (Company respondents)
- Other: 11% (Company respondents)
Figure 39: Are you more focused on B2B or B2C marketing?

- 42% for B2C marketing (Company respondents)
- 22% for B2B marketing (Company respondents)
- 38% for B2B marketing (Agency respondents)
- 29% for B2C marketing (Agency respondents)
- 29% for B2B and B2C (equally) (Agency respondents)

Figure 40: In which business sector is your organisation?

- Retail: 13%
- Financial Services: 12%
- Technology: 9%
- Media: 9%
- Professional Services: 7%
- Travel and Leisure: 6%
- Charities, Government and Non Profit: 6%
- Manufacturing: 6%
- Consumer Goods: 5%
- Healthcare and Pharma: 4%
- Telecoms: 4%
- Automotive: 3%
- Gaming and Gambling: 2%
- Other: 14%

Company respondents: 1,161
Agency respondents: 950

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Figure 41: What is your annual company revenue?

<table>
<thead>
<tr>
<th>Revenue Range</th>
<th>Company Respondents</th>
<th>Agency Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>£1 million – £10 million</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>£10 million – £50 million</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>£50 million – £150 million</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>£150 million – £1 billion</td>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>More than £1 billion</td>
<td>22%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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Company respondents: 765
Agency respondents: 575
Quarterly Digital Intelligence Briefing

The CX Challenge

Published October 2015

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