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CUSTOMER EXPERIENCE & PERSONALIZATION TRENDS **ROUNDUP**

October 2019

Omnichannel personalization is mission-critical for most marketers, and they are making investments to execute it more effectively. But for most, it's a long journey that involves slowly adding new channels, and the technology and processes to optimize them. eMarketer has curated this Roundup of articles and insights that identify the key trends in personalization and data-driven marketing today.

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SPONSOR MESSAGE

Data-driven marketing is not a new trend—in fact, retailers have utilized data to drive marketing efforts for decades. In a recent Acxiom study, 70% of retail respondents said using data to personalize marketing and customer experience is a key priority. But if that's the case, why are consumers frustrated by the customer experience delivered by most brands? And why doesn't every brand deliver a high-quality, personally relevant experience?

The answer is complicated. With the proliferation of channels and the increase of data volume, variety and velocity, it is difficult for retailers to gain a clear omnichannel picture of the consumer and how to help them along their journey.

Acxiom has been helping brands understand their customers and deliver great experiences for fifty years. We are sponsoring this roundup to share our belief that marketers need to continuously think about getting the right data, getting the data right and using data in an ethical way.



OVERVIEW

Marketers still have a long way to go to deliver holistic, data-driven experiences for customers across channels. Omnichannel personalization is mission-critical for most marketers, and they are making investments to execute it more effectively. But for most, it's a long journey that involves slowly adding new channels, and the technology and processes to optimize them.

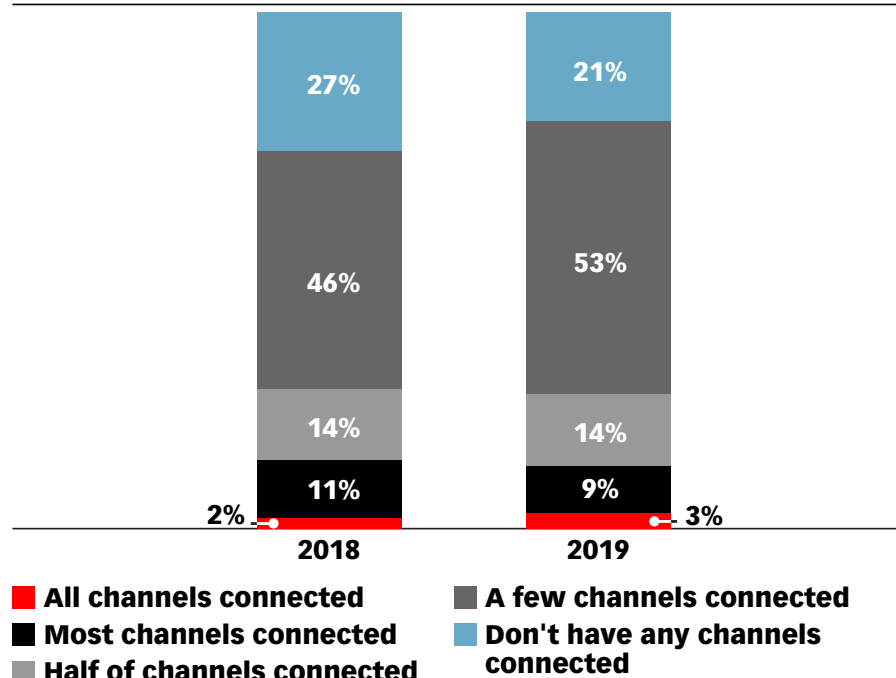
According to an April 2019 report by customer data platform (CDP) Evergage, only 3% of US companies polled had all channels connected in 2019 so they can provide omnichannel personalization. This was virtually unchanged since the prior year (2%). On the other end of the spectrum, 21% of companies didn't have any channels connected, down 6 percentage points since the earlier survey.

Forbes Insights and CDP ArmTreasure Data polling from March 2019 found that 78% of US companies they categorized as "leaders" in personalization were able to deliver personalized experiences in real time across channels. But even among the "learners" surveyed, about three in five said they could do the same. These results are significantly more optimistic than Evergage's findings, and represent a big jump in sophistication compared with research we have covered in the past.

A larger survey from Econsultancy and Adobe in December 2018 found that about 40% of business-to-consumer (B2C) and business-to-business (B2B) marketers worldwide had "begun" to offer real-time personalization. Only about one in 10 respondents said their strategies and tech were well-aligned around the

What Approach Are US Companies Taking Toward Omnichannel Personalization?

% of respondents, 2018 & 2019



Source: Evergage, "2019 Trends in Personalization" and "2018 Trends in Personalization," April 25, 2019

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customer—representing a change of just 2 percentage points over four years.

On the advertising front specifically, marketers aren't sure about their personalized messaging abilities. According to October 2018 polling by Forrester Consulting for programmatic creative platform RevJet, just over a third of US marketers were



confident they could create personalized advertising, and just under a third were confident they could deliver it.

How Confident Are US Marketers in Their Ability to Create and Deliver Personalized Advertising?

% of respondents, Oct 2018

Creating personalized advertising for customers



Delivering personalized advertising to customers



■ 5—very confident ■ 4 ■ 3 ■ 2 ■ 1—not at all confident

Note: n=109; numbers may not add up to 100% due to rounding
Source: Forrester Consulting, "The Personalized Advertising Confidence Gap" commissioned by RevJet, Oct 24, 2018

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And consumers agree: Marketers still aren't getting it right. March 2019 research from Periscope by McKinsey found that a plurality of polled internet users in the US, UK, France and Germany felt that most marketing messages they received didn't seem to be created for them at all. Just 32% of respondents in the US thought messaging seemed to be created specifically for them, the highest percentage out of all the countries polled.

The findings was similar to earlier research from Periscope by McKinsey, outlined in last year's "Customer Experience 2018" report. Respondents to this year's survey also indicated that the brands they frequently interact with aren't any better at delivering relevant messages than brands that don't know them

as well. Among US respondents, 29% thought messages from brands they often interacted with were more relevant, including just 9% who thought they were "definitely" more relevant. Again, respondents in France, Germany and the UK were even less impressed.

It's not just that companies still struggle to deliver data-driven experiences across channels. Many are also finding it difficult to take in the data that would make those experiences possible. According to polling by the CMO Council in H2 2018, just 4% of companies worldwide rated their ability to take in customer signals "exceptional," meaning they actually listened for customer cues in real time. Around two in five were willing to describe their capabilities as "fairly good," indicating they could listen for cues on some channels but struggled on others. The bulk of respondents reported having trouble both taking in signals from customers and understanding what they meant.

Those capabilities are likely to improve, if slowly. According to January 2019 polling by asset management platform Stackla, almost three in five B2C marketers in Australia, the UK and the US were planning to increase investment in personalization technology this year to support their content marketing efforts.

Even more were planning additional outlays for artificial intelligence automation technology, which underlies many of the most sophisticated efforts at identifying, understanding, segmenting and reaching customers with the right message in the right place at the right time.



ARE MARKETERS BEING REALISTIC ABOUT THEIR CUSTOMER EXPERIENCE?

Marketers and consumers feel differently about the delivery of an excellent customer experience. To reconcile this, marketers should turn their attention to consumers' top concerns, such as privacy and personalization.

In the US, almost half of marketers think they're delivering an "excellent" customer experience, according to January 2019 research from The Harris Poll. But fewer than a quarter of consumers felt the same.

Marketers vs. Consumers in North America and the UK Who Think Brands Are Able to Deliver an Exceptional Customer Experience, Jan 2019

% of respondents

	Marketers	Consumers
US	48%	22%
Canada	23%	15%
UK	31%	13%
Total	34%	18%

Note: ages 18+; "excellent" ability; read chart as 48% of US marketers believe brands have an excellent ability to provide an exceptional customer experience, vs. 22% of US consumers

Source: The Harris Poll, "Addressing The Gaps In Customer Experience" commissioned by RedPoint Global, March 27, 2019

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While marketer (over)confidence was lower in Canada and the UK, the degree of disagreement was similar. Overall, marketers were almost twice as likely as consumers to give themselves high marks on experience.

For its Customer Experience Index, The Harris Poll asked respondents to rate individual dimensions—privacy, personalization, customer understanding and omnichannel/consistency—on a 25-point scale, with a score of 25 indicating mastery. In every category, marketers ranked their abilities at least 3.5 points higher than did consumers.

Privacy, the concern emphasized most in the study, received 4.1 fewer points from consumers than from marketers. Additionally, 60% of respondents said they'd be less likely to shop or use services in the future if a company sent their personal information to other companies.

In a November 2018 survey of 1,000 US adult smartphone users by Jebbit, 35.9% of respondents said that being asked for too much information leads them to distrust a brand.

But if there is a value exchange, consumers are more likely to give up their information. Per The Harris Poll data, 54% of consumer respondents said they would be willing to share their personal information for a more tailored experience.

That personalized experience is one that 63% of consumers agree is now part of the standard service they expect from a



brand or retailer, and it's one that consumers ranked 4.2 points lower than marketers did on the Customer Experience Index. Seventy-three percent of consumers said brands are struggling to meet customers' rising expectations for a personalized experience, vs. 43% of marketers who felt the same.

Marketers should recognize and work to rectify these gaps, or they will run the risk of losing business. The Harris Poll found that 37% of consumers would abandon a brand that doesn't offer personalized experiences. However, companies that do will be rewarded. A December 2018 survey from Adobe found that 51% of US digital device users would be likely to make a purchase as a result of personalized brand content, and 34% would make a purchase they hadn't planned to due to enhanced recommendations.

Closing the gap in opinions toward the customer experience will require marketers to reposition their efforts—as well as greatly improve self-awareness.

What Actions Are US Digital Device Users Likely to Take as a Result of Personalized Brand Content?

% of respondents, Dec 2018

Make a purchase

51%

Become loyal to the brand

49%

Recommend the brand to others

46%

Subscribe to the brand's communications

44%

Make purchases that you didn't intend to due to enhanced recommendations

34%

Note: ages 18+ who use digital devices such as desktop/laptop, smartphone or tablet

Source: Adobe, "2019 Adobe Brand Content Survey" in partnership with Advanis, Feb 13, 2019

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WHAT TYPES OF PERSONALIZED CONTENT APPEAL TO CONSUMERS?

Finding the right balance when serving personalized content to consumers can be tricky. But marketers that do this successfully understand that fostering better communication with their target audience is key.

What Are the Drivers of Personalization at US B2C Companies?

% of respondents, March 2019

Deliver better customer experience

86%

Generate measurable lift/ROI

61%

Increase loyalty

58%

Customers/prospects expect it

39%

Drive more leads

36%

Competitive pressures

33%

Note: n=271

Source: Evergage, "2019 Trends in Personalization," April 25, 2019

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According to a March 2019 survey from Evergage, 86% of US business-to-consumer (B2C) companies said delivering a better customer experience drives personalization. Sixty-one percent cited generating measurable lift/return on investment (ROI), and 58% said increasing loyalty is what fuels their personalization efforts. To meet these goals, marketers need to pay attention to what consumers actually want.

Often, the case is that shoppers feel inundated with content they don't think applies to them. A February 2019 survey from Havas found that 58% of content created by the world's leading 1,800 brands was "poor, irrelevant and fails to deliver." When personalization is effective, it's because product recommendations and offerings are made based on consumer interests, purchase history and relevancy.

When personalization is effective, it's because product recommendations and offerings are made based on consumer interests, purchase history and relevancy.



Half of US internet users say that receiving product recommendations related to their interests appeals to them, and 45% say this content is the type they get most frequently, according to a March 2019 survey from Periscope By McKinsey. Those results are relatively aligned, but the same can't be said across all personalized content categories.

Personalized Content from Companies that US Internet Users Find Appealing vs. Commonly Receive, March 2019

% of respondents

	Find appealing	Commonly receive
Products related to interest	50%	45%
Similar product recommendations based on purchase/search	43%	47%
Updates on availability/price	43%	34%
Retargeting of the exact product	35%	43%
Based on your location	30%	27%
Reminded about a special offer	30%	27%
Basket/repeat purchase reminder	28%	29%
Products left in stock	18%	15%
Contained your name	17%	28%
Other	8%	6%

Note: n=1,010 ages 18-69

Source: Periscope By McKinsey, "The Art of Personalization — Keeping it Relevant, Timely and Contextual," April 30, 2019

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Sometimes, consumers receive more personalized content than they'd like—and other times they don't get enough. That misalignment may hurt brands in their efforts to improve the customer experience or drive loyalty.

Among those surveyed, 43% said that getting updates on product availability and price was the most appealing content to receive, while only 34% said it was the most common. Also unbalanced is retargeting of the same product—43% of respondents said it was the most common type of received content, and just 35% felt it was most appealing.

In a January 2019 survey conducted by Salsify, one in five respondents said they felt understood when a brand or retailer recommended relevant items, and 15% of respondents cited when a company remembered their purchase history.

These results illustrate that consumers are looking for personalized content and understanding. They want relevant, curated content that is sent to them enough (but not too much).

And when that desire is met, marketers are rewarded. Per a December 2018 survey from Adobe, 51% of US digital device users were likely to make a purchase when they received personalized content. A similar number said personalization pushes them to become loyal to a brand, and 34% said they'd make a purchase they hadn't previously intended to due to enhanced recommendations.



HOW'S THAT PERSONALIZATION GOING?

Marketers constantly strive to provide cohesive and tailored experiences to consumers. But recent data from Infogroup shows that many still miss the mark.

Of the US internet users surveyed, 93% said they weren't getting any relevant marketing communications, and almost as many (90%) were annoyed by irrelevant messaging.

More importantly, 44% of respondents said they would switch to other brands that did a better job of personalizing the content they saw.

The Infogroup study is just one of many that illustrates the ongoing struggles companies face when delivering experiences consumers have come to expect. According to January 2019 research from The Harris Poll, nearly three-quarters of consumers in North America felt that brands struggle to create more personalized and individual experiences, thanks in large part to rising expectations.

"In an era of information overload, consumers appreciate brands that give them signal rather than noise," said Andrew Lipsman, eMarketer principal analyst. "But few brands have enough first-party data to consistently deliver the personalized experience that most consumers crave. Many will need to up their game or risk turning away their customers over time."

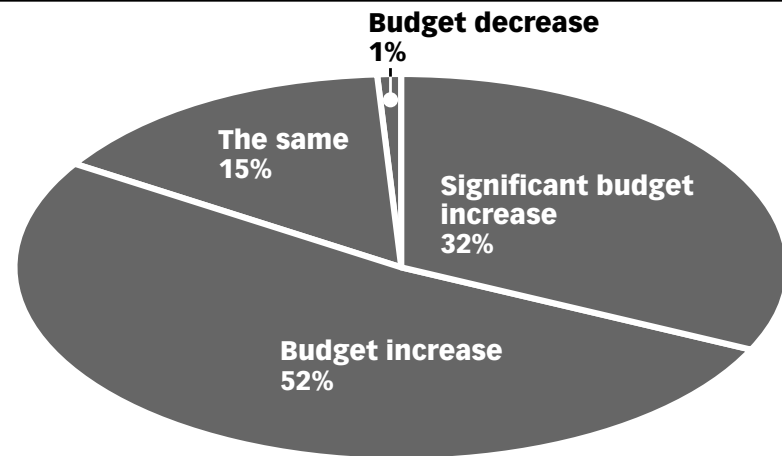
And marketers are working to get there. A third of companies worldwide surveyed in May 2019 by Forbes Insights said they place a "high priority" on delivering personalized customer experiences, and 57% said they place "somewhat of a priority."

They're also investing in the technology, too.

More than half of companies worldwide said they plan to increase their spending on personalization, according to May 2019 data from SoDA, in partnership with Sitecore. Roughly a third (32%) said they plan to significantly increase their budget.

Change in Spending on Personalization in 2019 by Companies Worldwide

% of respondents



Source: SoDA, "Global Trends in Personalization" in partnership with Sitecore, May 2, 2019

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MORE RESEARCH SHOWS THAT CONSUMERS MAY NOT ALWAYS PERCEIVE THE EXPERIENCE AS PERSONALIZED

Many marketers may want to believe that customers prefer personalized marketing experiences, but while research backs up that claim, recent consumer skepticism over the use of personal data means that there's a growing sentiment that more personalization does not beget a better experience.

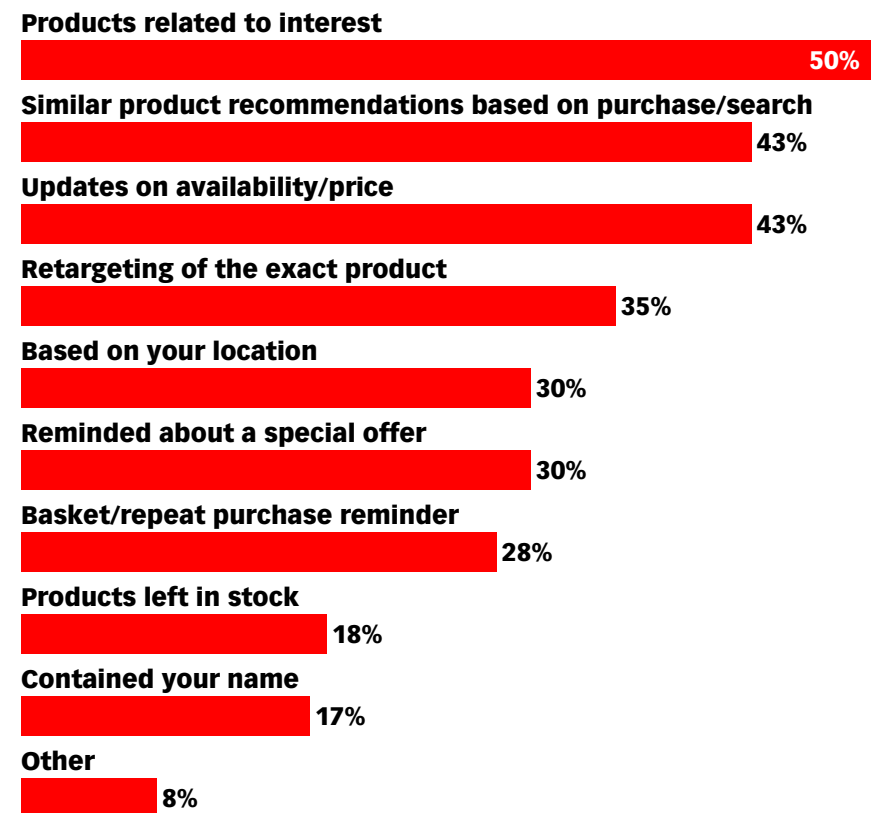
For our June report on personalization and data-driven experiences, Nicole Perrin, principal analyst at eMarketer, found that marketers generally insist customers want personalized marketing experiences. Marketers she spoke with also conveyed that committing to personalization is the bare minimum needed for successful targeting campaigns.

"Marketers, especially digital marketers, love data and the promise of optimization it holds," Perrin said. "And many report a lift in engagement, conversions or other behaviors they're trying to drive, based on tailoring relevant messages. But while a 1-point lift for a marketer may be a result worth celebrating, it doesn't necessarily mean consumers are perceiving those messages as personalized and highly relevant."

In March 2019, Periscope By McKinsey asked US internet users what type of personalized content was most appealing; no answer garnered an outright majority of responses. Half of respondents said that products related to their interests were appealing, and only four responses appealed to at least one-third of those polled.

What Do US Internet Users Think Is the Most Appealing Type of Personalized Content to Receive from Companies?

% of respondents, March 2019



Note: n=1,010 ages 18-69

Source: Periscope By McKinsey, "The Art of Personalization: Keeping it Relevant, Timely and Contextual," April 30, 2019

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Respondents were also asked what businesses they wished to receive personalized messages from, and in the US, 52% said they would prefer them from restaurants and bars, but no other category appealed to the majority of respondents.

52% said they would prefer [personalized messages] from restaurants and bars, but no other category appealed to the majority of respondents.

“Consumers have been less than impressed by ad and other message relevance, despite marketers’ data-driven efforts,” Perrin said. “As they’ve become more aware of the personal data collection that underpins marketing personalization and targeted advertising, they’ve also started indicating they’re not sure it’s worth handing over their personal information in exchange for relevance.”

In a study conducted by risk management firm RSA Security, 29% of internet users surveyed from France, Germany, the UK and US said that providing more data to companies leads to better products and services, which is down 2 percentage points from responses the year before.

Internet Users in the US and Europe* Who Believe that Providing More Data to Companies Leads to Better Products and Services, 2017 & 2018

% of respondents



*Note: ages 18+; *France, Germany and UK
Source: RSA Security, "RSA Data Privacy & Security Survey 2019: The Growing Disconnect Between Consumers and Businesses," Feb 6, 2019*

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When asked about whether various forms of personalization were ethical, 45% of respondents in the same study said that using personalization to monitor fraud was ethical. Only 17% said that tracking online activity to tailor advertisements was ethical.



ACXIOM'S THREE FUNDAMENTALS OF DATA-DRIVEN RETAIL MARKETING

This post was contributed and sponsored by [Acxiom](#).

We're all sold on the vision of relevant marketing. Not just sold, in fact we're actively committed to making it happen. What does this relevant marketing look like? Smooth, personalized experiences aimed at real people, not device IDs. Seamless interactions, wherever customers are. Predictions that truly anticipate customers' needs. All powered by data.

And yet, retail brands still struggle to make sense of the petabytes of data pouring into their systems. Acxiom recently interviewed senior marketers and decision-makers for a study on the state of data-driven marketing across different industries, including retail.⁽¹⁾ We asked companies about their challenges, priorities and use of data. After slicing and dicing the data, here's the bottom line: The world has changed, and data matters more than ever.

While 70% of retailers surveyed want to use data to personalize marketing and enhance customer experiences, 60% do not have a data strategy that's been refreshed within the last 12 months. To win in today's market and deliver a relevant, personalized and impactful omnichannel customer experience, retailers should focus on these three fundamentals:

No. 1: Get the right data.

Getting the right data starts with asking a few basic questions. Think about your goals as a business—what data will help you achieve these goals? Is it more of your own first-party data? More second-party data that provides insights into how your customers are engaging with other brands? More third-party data to help find consumers who are likely to buy your product? Consider which of these data sets will give you a unique edge in converting prospects into customers

and delivering a personalized, relevant customer experience that will create loyalty to your brand.

No. 2: Get the data right.

Every new device, every new customer touchpoint and every new technology is a new data source. Reconciling all these channels, platforms, devices, and identities is key to delivering a relevant, personalized and impactful customer experience. Only when you bring together all the data from those disparate sources into a single, whole view, can you understand the heart of what an individual consumer actually cares about.

No. 3: Use your data in the right way.

Leveraging data only works when the data is kept safe, secure and anonymized as regulations require. The same applies to creating a unified data layer that supports your customers across the whole customer journey. Ethical data use protects your customers and your brand, and allows you to build long-lasting customer relationships. With the General Data Protection Regulation (GDPR) in full swing in the European Union, the California Consumer Privacy Act (CCPA) right around the corner, and dozens of other regulations being considered, data privacy and ethics should be a top priority among senior marketers and decision-makers. Yet, interestingly enough, our research shows that only 52% deem data privacy and ethics a top marketing priority.

The steps sound simple enough, but until now, execution has proven harder than it should be. We've been hampered by silos and data fragmentation, by changing privacy legislation, differing data sets and innumerable new technologies. To learn more, download our eBook: [3 Fundamentals of Data-Driven Marketing](#).

⁽¹⁾ Acxiom independent proprietary research, 2019



WHEN EXPERIENCE MATTERS

Acxiom has been helping brands across the globe improve customer experiences through the combination of data, ethics, ideas, and technology for more than 50 years.

The customer journey is complex, yet customers still expect brands to know and understand them and provide seamless and personalized experiences at every step. Data is the key to creating meaningful and relevant interactions at scale between consumers and the brands they love. By creating data foundations for the world's best marketers, we are dedicated to helping marketers reach audiences with relevant messages driven by insight to deliver personalized experiences that foster loyalty, drive revenue, and elevate your brand above your competition.

Visit [acxiom.com/retail](https://www.acxiom.com/retail) to learn more.

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MARKETERS STRUGGLE TO DELIVER OMNICHANNEL PERSONALIZATION THAT CONSUMERS CRAVE

While the ability to identify customers across marketing channels has improved, most marketers still struggle to deliver data-driven experiences across all touchpoints.

Only 3% of US companies said they had true omnichannel personalization, according to a March 2019 survey by customer data platform (CDP) Evergage. Just 26% said they had at least half of their marketing channels connected. At the other end of the spectrum, 21% didn't have any of their marketing channels connected, up 6 percentage points from the prior year.

What Approach Are US Companies Taking Toward Omnichannel Personalization?

% of respondents, March 2019

Have all channels connected

3%

Have most channels connected

9%

Have about half our channels connected

14%

Have a few channels connected

53%

Don't have any channels connected

21%

Note: n=215

Source: Evergage, "2019 Trends in Personalization," April 25, 2019

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Omnichannel personalization makes customers feel like individuals, and most expect this type of marketing outreach. According to a January 2019 survey conducted by The Harris Poll, 63% of consumers in North America and the UK agreed that they expect personalization from brands and retailers. And 43% of respondents said that brands made them feel like an individual when they were reaching the same customer across all touchpoints.

The Harris Poll survey also revealed a gap in expectations. The majority of consumers (73%) felt that brands struggled with rising expectations for a personalized experience, compared with 43% of marketers that admitted to struggling in this area. Consumer frustration stemmed from brands' sometimes subpar execution in omnichannel marketing, including receiving an offer for something they already bought (37%) and not being recognized as an existing customer (33%).

However, only 37% of consumers surveyed said that they would stop doing business with a brand for these reasons, indicating a window of opportunity for brands to improve their execution and narrow the expectations gap.

"Even in the era of privacy, consumers are clamoring for better use of their personal data to drive relevant and consistent omnichannel shopping experiences," said Andrew Lipsman, principal analyst at eMarketer. "Because brands and retailers have built trust with consumers—after all, you're logging in to the site and willing to fork over your credit card information—you want that trust reciprocated by delivering an experience that respects the user's time, attention and money."



TRADITIONAL RETAILERS INVEST IN D2C STRATEGIES: AN INTERVIEW WITH CHARLIE COLE OF SAMSONITE

Direct-to-consumer (D2C) brands thrive on their abilities to build strong customer relationships, optimize data and identify the unmet needs of modern customers. More and more, brands see these digital natives as a threat.

According to a February 2019 survey from customer acquisition company CommerceNext, 52% of digital retailers in North America were dissatisfied with their ability to achieve a single view of the customer last year, noting “unified customer data” performed below their expectations. For this reason, respondents planned to increase their investments most in customer data platforms and personalization technology, with hopes of making the customer experience more relevant.

To stay ahead of the game, some legacy brands are investing in D2C strategies—like merged companies Samsonite and Tumi, who are taking data optimization and personalization tactics straight from the D2C playbook. Samsonite, the world’s largest luggage company, acquired luxe-luggage brand Tumi in 2016. This union solidified Samsonite’s place in the upscale market and allowed Tumi to expand internationally. Now the brands have their sights set on transforming the digital travel space.

We spoke with the Charlie Cole, chief digital officer at Samsonite, about replicating a D2C model, prioritizing personalization and the benefits of being channel-agnostic.

How Will Marketing Departments at Digital Retailers in North America Invest in Select Emerging Technologies in 2019?

% of respondents, Feb 2019

Customer data platform



Personalization technology



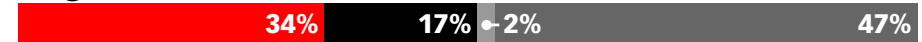
Alternative payments



Chatbots & other AI for customer service



Programmatic TV



Visual search



AR/VR



Voice-enabled search



■ Increase in investment ■ Decrease in investment
■ Same level of investment ■ No investment

Note: vs. in 2018

Source: CommerceNext, "How Leading Retailers and Direct-to-Consumer Brands Are Investing in Digital" sponsored by Oracle, May 30, 2019

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What is the most appealing aspect of a D2C model, and how are you attempting to replicate that?

The ultimate benefit of having a direct-to-consumer model is the pure, unvarnished relationship you have with the consumer. That brings with it a number of benefits: data, real-time feedback and, more importantly, trust with the brand. When selling through other folks, you have some dilution in data, but you also have a level of dilution with the relationship itself.

We're attempting to replicate that model by understanding customer needs in a way we could never achieve if we worked exclusively through third parties. This becomes a combination of conversations directly with consumers and the use of predictive data to optimize on a grand scale.

What is the benefit of a customer data platform for Samsonite and Tumi, and how does it help with bettering your personalization efforts?

We have more data on consumers purchasing travel products than probably anyone on Earth. If we've learned anything from the success of Amazon, Netflix, Uber (although their success is not our kind of success because of the cash burn needed), having data that you can use as the fabric for your predictive marketing and personalization is a massive advantage—if it's done well and done in a way that respects user privacy.

In what ways might being a traditional brand benefit the adoption of a D2C strategy?

For traditional brands taking on some of the characteristics of a D2C company, the greatest benefit is that they have been investing in a unified customer view since day one. They don't have data silos. They also have a more holistic view of the

many marketing channels. And they have a big-picture view of everything, from brand marketing to performance marketing—they're channel-agnostic.

In what ways might it hinder D2C adoption?

We shouldn't forget that digitally native brands are typically private companies with venture capital backers. They face a different set of realities compared with mature companies, traditional retailers, wholesalers or brick-and-mortar-first brands (who often must first please shareholders with profits). They have a different set of growth goals and internal stakeholders to please—and to not mince any words: D2Cs get to burn a lot of money. For some traditional brands, it's not feasible to do a total overhaul of their marketing stack to unify customer data, at least not all at once. They aren't able to respond as nimbly as D2C brands because of the profit expectations their shareholders have.

What advice would you give other brands who are thinking of investing in a D2C strategy?

You can't fake it. You are competing against brands that have carte blanche to burn tens of millions—if not hundreds of millions of dollars. If you want to compete, you may have to change your definitions of near-term success to allow for long-term viability.

"Having data that you can use as the fabric for your predictive marketing and personalization is a massive advantage—if it's done well and done in a way that respects user privacy."



Charlie Cole,
Chief Digital Officer, Samsonite

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