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SAMPLE: Quarterly Digital Intelligence Briefing: Digital Trends for 2013

in association with Adobe

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Econsultancy London
4th Floor, Farringdon Point
29-35 Farringdon Road
London EC1M 3JF
United Kingdom

Telephone:
+44 207 269 1450

http://econsultancy.com
help@econsultancy.com

Econsultancy New York
350 7th Avenue, Suite 307
New York, NY 10001
United States

Telephone:
+1 212 971 0630

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1. Foreword by Adobe

We are excited to launch this first Quarterly Digital Intelligence Briefing of 2013 which is aimed at shining a torch on some of the trends which will have the biggest impact on the way we work as marketers over the next 12 months and beyond. It is our first opportunity to compare with the same report a year earlier, and it's great to see that many of the trends which surfaced have increased in their significance to marketers, notably; content, conversion, mobile and social. Also to see the priority of personalization, highlighted for the first time.

As we begin a new year, we hope that this briefing will help to debunk some of the myths that continually surround marketing around our ability to measure and prove the value of everything we do. At Adobe we are trying to debunk these myths with our own campaign called 'Metrics Not Myths'. We are committed to helping marketing departments provide tangible evidence that they are responsible for driving sales and other types of conversion, as well as enabling companies to manage – and measure – consistent personalized experiences that span every online and offline channel.

As a technology supplier to marketers it's exciting to see over three quarters of survey respondents believe marketing will be more measurable in 2013, if surprising to see less than a fifth think they already have the marketing technology to succeed.

We believe Adobe is uniquely positioned to help marketers in 2013; the Adobe advantage we give them is the unique ability to create engaging digital content in the Adobe® Creative Cloud™ and directly inject it into personalized campaigns which are optimized across every channel via the Adobe® Marketing Cloud.

Adobe® Marketing Cloud is a single service which gives our customers a complete set of analytics, social, advertising, targeting and web experience management solutions. It also provides a real-time dashboard that brings together everything you need to know about your marketing campaigns so you can get from data to insights to action.

It is clear that 2013 will be more challenging, exciting, and potentially rewarding than any before in digital marketing. On behalf of everyone at Adobe, we look forward to helping you meeting your business goals over the year ahead.

Neil Morgan
Senior Director, EMEA Marketing
Adobe® Marketing Cloud

@neil_morgan_uk

#MetricsNotMyths

2. The year of content – creating, optimizing and marketing content

Based on a survey of more than 700 digital professionals carried out in late 2012, this report looks at the trends which have now gathered enough momentum to shape the digital marketing and e-commerce landscape over the year ahead.

The single most significant trend is the continued emergence of content marketing as a standalone discipline. Content, in all its shapes and forms, is core to everything we do as marketers. There is now a widespread realization that optimization of...

Figure 1: What do you regard as the most important opportunity in 2013?

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What do you regard as the most important opportunity for 2013, and why are you focusing here?

"Attempting to optimize content for mobile and how this might dovetail with offline data to form a single view."

"Joining up online and offline data – or leveraging big data and the many sensors that collect data – we only utilize 5% of what we collect."

Survey respondents

3. Capitalizing on engagement: increasing conversion from earned and owned media

The chart below shows the top priorities for in-house marketers in 2013, with the equivalent figures for 2012 also included. The emergence of *content marketing* as an important discipline in its own right is again clear to see, with a significant jump in the proportion of respondents who point to this as a priority for 2013 (up from 29% to 39%). The other notable year-on-year increase is for *conversion rate optimization* which has gone up from...

Figure 2: Which three digital-related areas are the top priorities for your organization in 2013?

Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

While *social media analytics* as a focus is (worryingly) not on the radar as a priority for many companies, *social media engagement* has...

4. Great content, spread through social channels and consumed anywhere

Figure 3 shows the pecking order of digital marketing priorities from the supply-side perspective, with *content marketing* again emerging as a key focus area with a jump to 38% from only 21% a year ago.

Agency respondents are more likely than their in-house counterparts to perceive *mobile optimization* as a top priority, with this option...

Agencies

Figure 3: Which three digital-related areas are the top priorities for your clients in 2013?

Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

The social media 'channel' is continuing to move from the confines of the marketing department to wider usage across the organization, for example as part of...

What do you regard as the most important opportunity for 2013, and why are you focusing here?

"The most important opportunity is content as this pervades all the digital media that we are using to reach our audiences."

Survey respondents

5. Inspired content + informed algorithms – excitement for 2013

When marketers looked at the year to come at the start of 2012, they voiced their strong opinion that social media engagement was the most *exciting* digital opportunity they faced. With another year of social programs under their belt, this activity is now becoming a reliable part of the playbook.

Excitement is now centered more evenly around several areas, with *mobile optimization* now enjoying a...

Companies

Figure 4: What are the three most exciting digital-related opportunities for your organization in 2013?

Note: 'Targeting & personalization' and 'connected TV' were new options for the latest survey.

6. CMO and CXO? The role of marketing in customer experience management

Since the early days of the web, marketers have been aware that it's not just important to provide good content, but a good experience. Every delay or confusion, broken link or coding error costs money today, and quite possibly a future customer. But "experience" goes well beyond usability, it includes not just *what we do* in brand spaces, but *how we feel* and *what we think* while we're doing it.

Now as we're well into the…

Companies

Figure 5: Do you agree or disagree with the following statements?

7. Pi-shaped marketers shall inherit the digital earth

Unless you spent 2012 living in solitary confinement, big data (also discussed in *Section 3* of this report) is a phrase you will have heard and read countless times. Whether it annoyed you, confused you or intrigued you, its omnipresence has been testament to the increased role of data-driven decision making within businesses.

Another on-going (and related) trend is the increased role of technology within…

Companies

Figure 6: How does your organization regard the following challenges as it goes into 2013?

8. Omnichannel consumers on the march – priorities for a mobile customer base

Lines between online and offline experiences are blurring and this is most evident when looking at the evolution of retail. Research has become a significant component of any purchase decision, partly driven by the prevalence of mobile devices, and the paths leading to conversion can be quite intricate.

A recent Econsultancy survey found that 44% of consumers always research purchases online before actually buying in-store, while a further 52% sometimes check online before buying in-store.[1]

2013 will be the year when more companies actually…

Companies

Figure 7: How important will the following be for your digital marketing over the next few years?

What, if anything, prevents you from harnessing data more effectively for marketing?

"Multiple tools and tracking, cross-device behavior tracking, third party data is being used incorrectly due to old, antiquated approaches and getting it to implement."

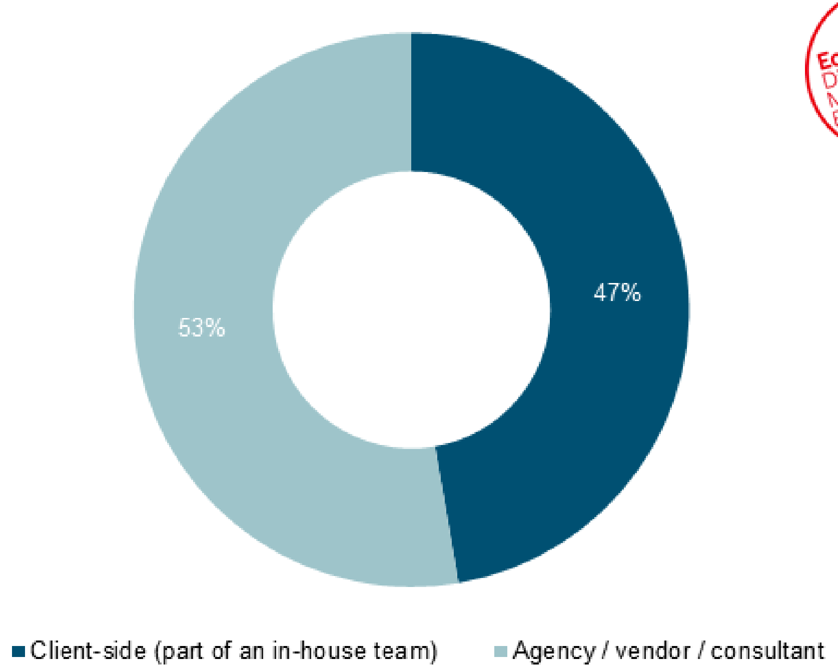
Survey respondents

[1] *http://econsultancy.com/reports/how-the-internet-can-save-the-high-street*

9. Appendix: Respondent profiles

This eighth Quarterly Digital Intelligence Briefing is based on an online survey of more than 700 client-side and agency respondents, carried out in October 2012.

Figure 8: Which of the following best describes your company or role?



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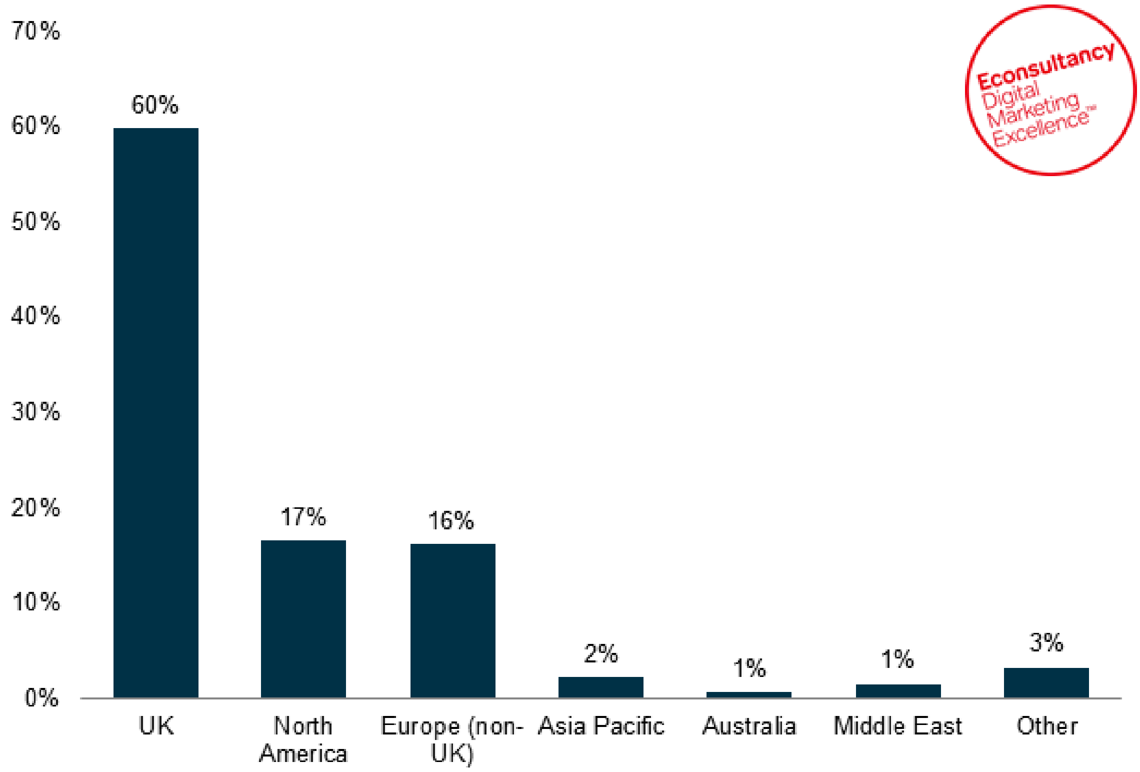
9.1. Geography

The majority of respondents are based in the UK. Just under a fifth (17%) of respondents are based in North America and 16% in Europe (non-UK). Other countries and regions represented include Australia, South America and the Middle East.

Figure 9: In which country / region are you (personally) based?



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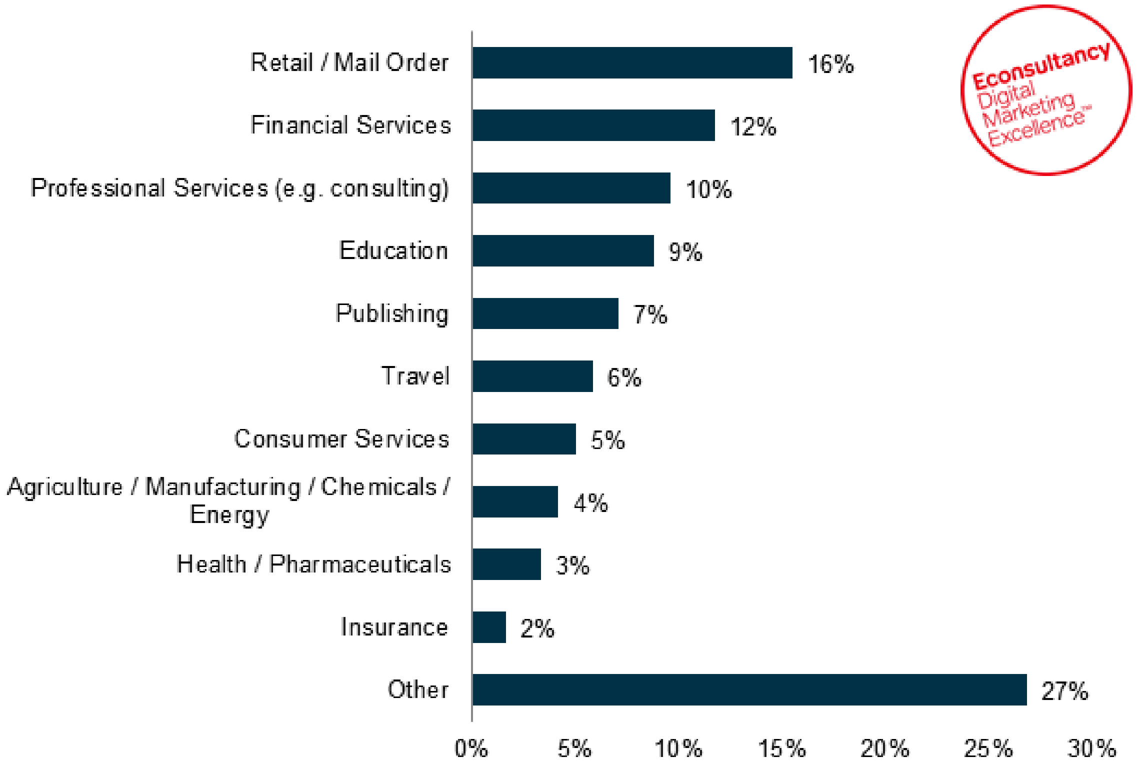
9.2. Business sector

Respondents work across a wide range of different industry sectors. The best represented sectors are *retail and mail order* (16%), *financial services* (12%), *professional services* (10%) and *education* (9%). Just over a quarter of respondents (27%) specify 'other' as their sector. Other sectors included *public sector/not-for profit* and *IT*.

Figure 10: In which business sector is your organization?



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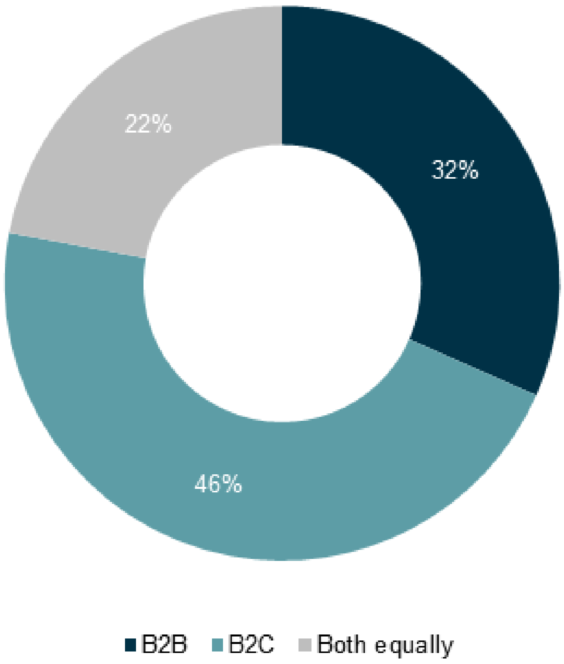
9.3. Business focus

The chart below shows to what extent businesses are focused on B2B, B2C, or both. Just under half of respondents (46%) are exclusively focused on B2C, while around a third (32%) are B2B focused. Just over a fifth (22%) are focused on both B2B and B2C.

Figure 11: Is your business focused more on B2B or B2C?



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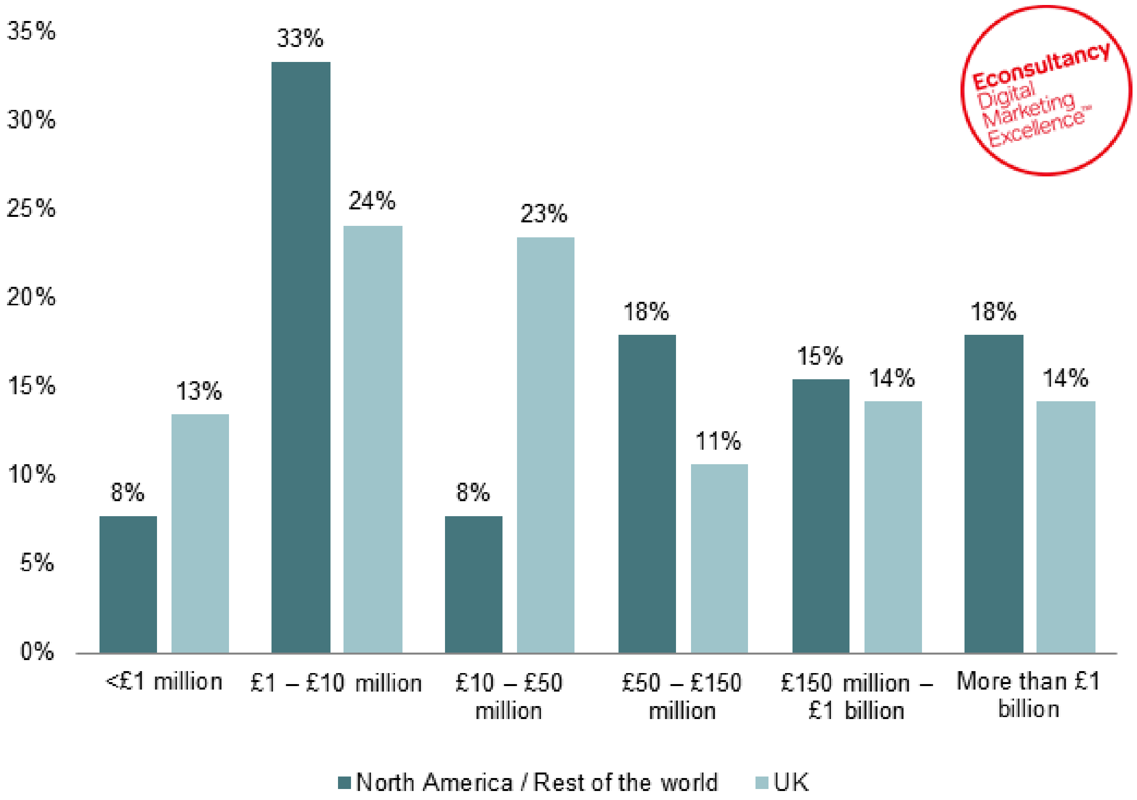
9.4. Size of company by revenue

The chart below shows the annual revenue of responding (client-side) organizations.

At the upper end of the scale, around half (51%) of client-side respondents outside the UK earn more than £50m each year.

Client-side respondents
Figure 12: What is your annual company turnover?



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