



Market Data / Supplier Selection /
Event Presentations / User Experience
Benchmarking / Best Practice /
Template Files / Trends & Innovation



Quarterly Digital Intelligence Briefing: Finding the Path to Mobile Maturity

in association with Adobe

Quarterly Digital Intelligence Briefing: Finding the Path to Mobile Maturity

in association with Adobe



Published May 2014

All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording or any information storage and retrieval system, without prior permission in writing from the publisher.

Copyright © Econsultancy.com Ltd 2014

Econsultancy London
Wells Point
79 Wells Street
London W1T 3QN
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

Contents

1. Foreword by Adobe.....	4
2. An even bigger deal.....	5
3. The mobile experience IS the customer experience.....	7
4. Strategy for mobile	9
5. Responsive for the win?.....	11
6. Apps are alive and kicking but some still in search of a meaning.....	14
7. Measuring and optimizing apps leaves many in the dark	17
8. Mobile optimization... not just about the website and apps	21
9. The glue of multichannel retail.....	23
10. Appendix – Respondent Profiles.....	25
10.1. Transactional website	26
10.2. Geography.....	27
10.3. Business focus	28
10.4. Business sector	29
10.5. Job roles.....	30
10.6. Size of company by revenue	31

1. Foreword by Adobe

For many companies, their first foray into mobile was creating a stripped down, non-responsive version of the company website for mobile phones with poor web browsers, and proudly proclaiming they had an enterprise mobile strategy. We all might sheepishly laugh at that bit of naiveté now, but who among us truly understood just how transformative mobile was going to become to the customer journey, and therefore to our businesses?

While we can now all admit that mobile has proven much bigger than we thought it was going to be, this new research from Econsultancy and Adobe proves that we still seem to be lagging behind the mobile revolution in creation of proper mobile strategies. For example, only 13% of companies describe themselves as being “mobile-first” – with most organizations indicating they are still playing catch-up. Additionally, just 36% of companies agree they have a mobile strategy compared to 45% who disagree.

Many organizations we’ve talked to are also still battling with the challenges created by mobile on a number of fronts, whether debating the merits of a responsive website or working out whether their apps are actually helping to achieve their business objectives.

But what is clear from this report, is the extent to which marketing efforts across owned, earned and paid media are impacted by mobile. Mobile isn’t a single channel or silo that can be treated in isolation. Rather, consumer behavior on smartphones and tablets needs to be borne in mind when we are considering a whole raft of tactics – from website optimization and app development, to email marketing and paid search implementation.

We are delighted that this study distils some of the most important aspects of mobile marketing optimization into a single report, and hope that it gives you some insights and ammunition to help overcome any roadblocks you are encountering on your journey to becoming a more mobile-friendly business.



Mark Phibbs
Vice President, EMEA Marketing
Adobe

2. An even bigger deal

For the few marketers and ecommerce professionals left in the world who need convincing about the impact of smartphone and tablet usage on their businesses, the charts below are a clear reminder of why a relentless focus on mobile is essential.

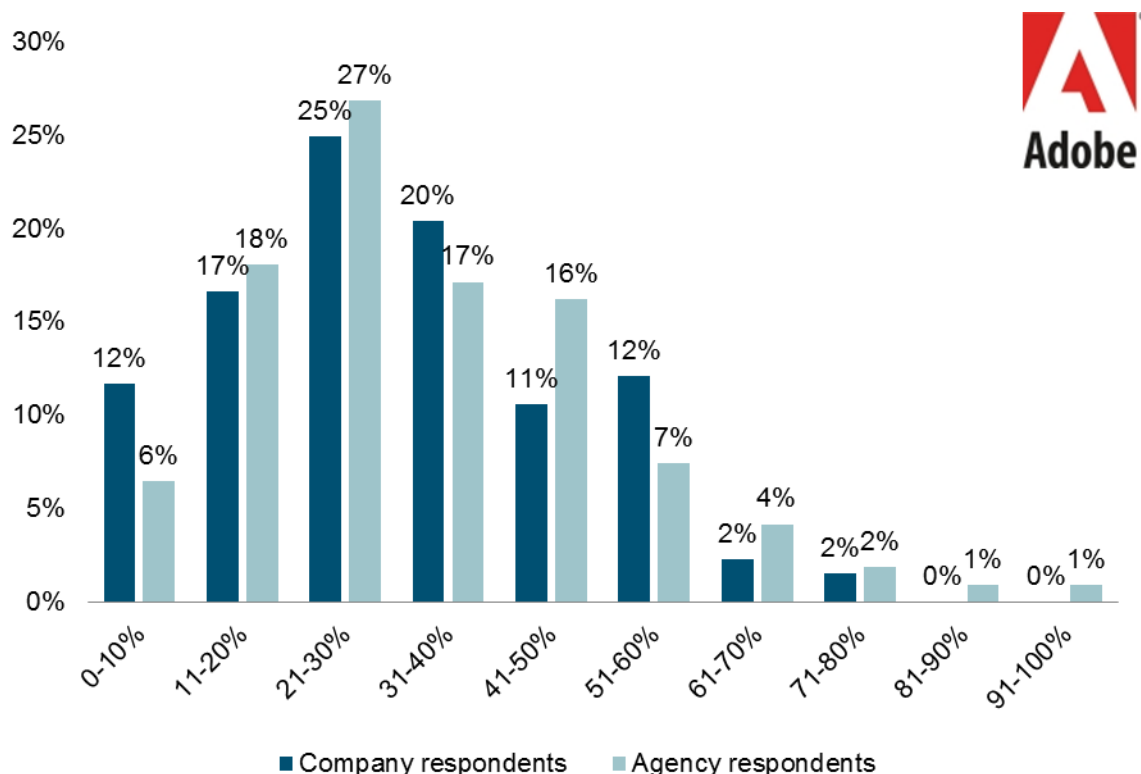
On average, businesses surveyed for this study report that 31% of their website traffic is via mobile devices (*Figure 1*), a share which would have been unimaginable just a few years ago. This is backed up by the data that Adobe collects on behalf of customers, with 31% of the data processed by Adobe Analytics in Q1 2014 originating from a mobile device.

Furthermore, for businesses with transactional websites, an average 16% of their revenue now comes from mobile, while 20% of sales are influenced by engagement on mobile devices.

While these stats are striking and make a useful addition to the overwhelming body of evidence which supports the need for mobile readiness, this briefing aims to delve more deeply into mobile strategy, the types of approaches to mobile optimization and the use of apps.

Based on a survey of 600 client-side and agency marketers, this Quarterly Digital Intelligence Briefing provides data and insights for those wishing to benchmark their own activities around mobile, and to elevate the importance of related business initiatives within their organizations.

Figure 1: How much of your / your clients' total website traffic is via mobile devices? (including tablets and smartphones)

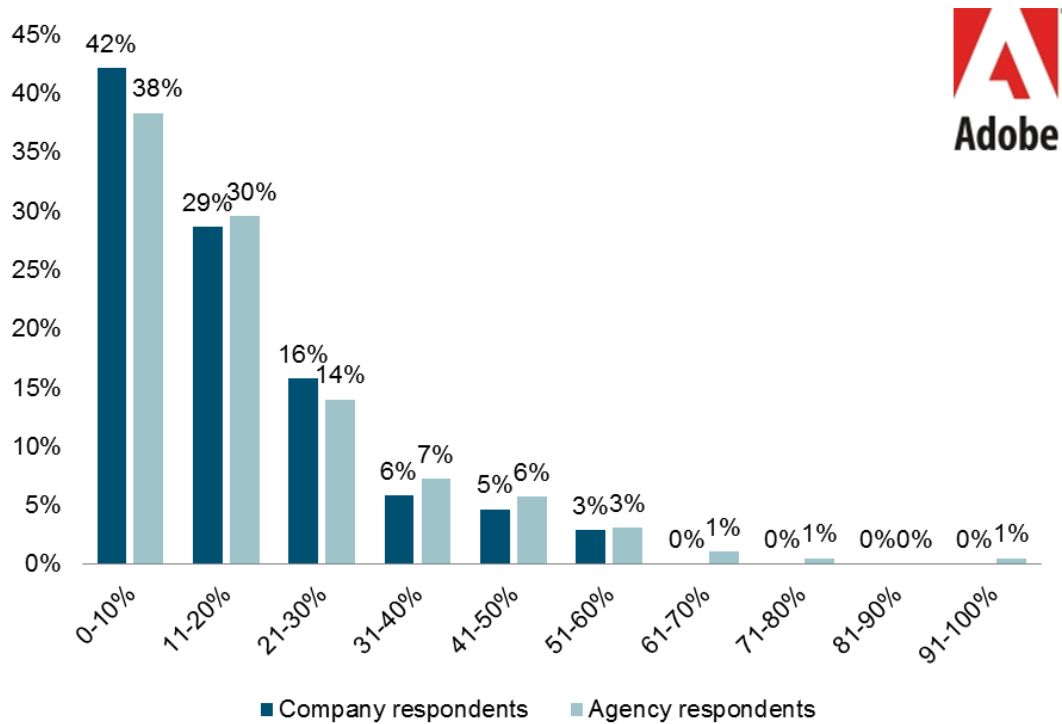


Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 292

Agency respondents: 247

Figure 2: What percentage of your / your clients' overall ecommerce revenue is transacted directly on mobile devices? (including tablets and smartphones)

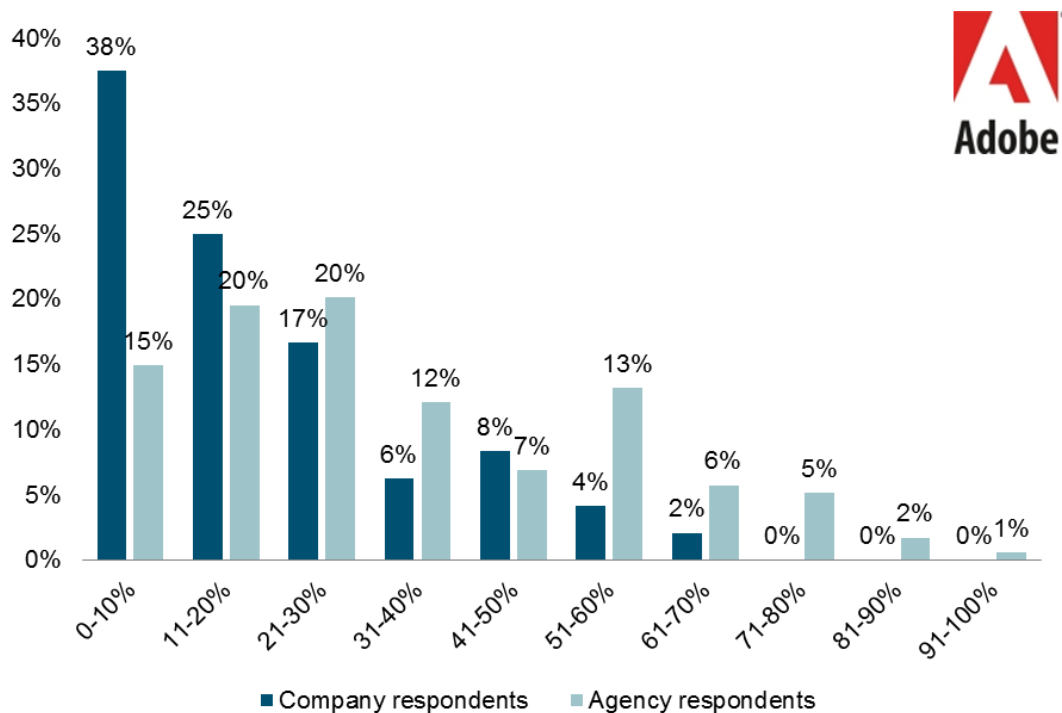


Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 204

Agency respondents: 246

Figure 3: What percentage of your / your clients' overall revenue is influenced by engagement on mobile devices? (including tablets and smartphones)



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 81

Agency respondents: 227

3. The mobile experience IS the customer experience

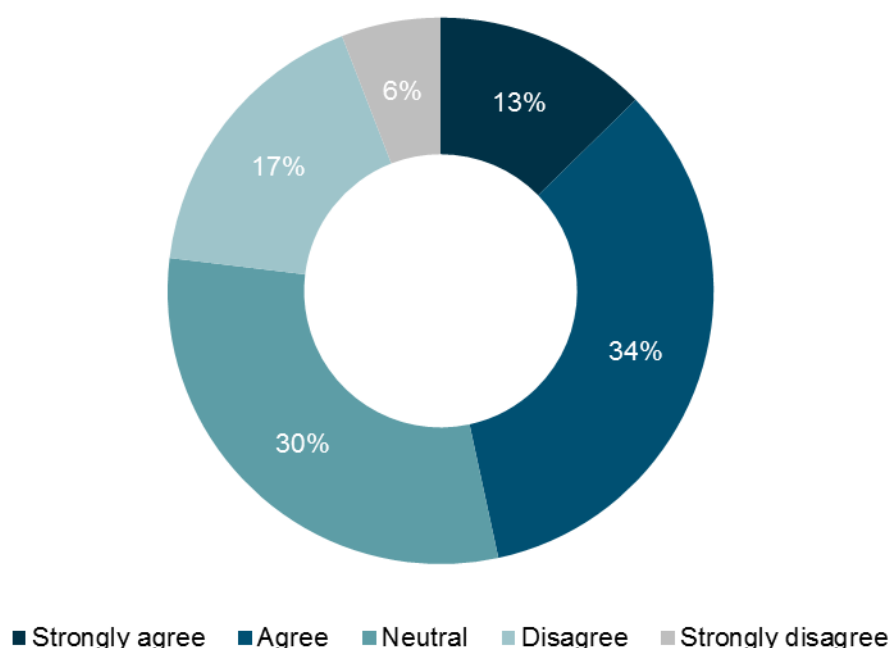
As consumers, we demand simplicity from our mobile devices. Whether we are completing tasks such as transferring money from one account to another, downloading movies on to our tablet or uploading a family photograph on to Instagram, ease of use has become something that we either take for granted or, when something is broken, become vexed about.

The experience we have with brands on our phones and tablets is often the linchpin which is holding together the whole cross-channel customer experience and sometimes even the sum total of our engagement with a particular brand.

As the pie chart below shows, nearly half of company respondents (47%) believe that *'the quality of the mobile experience is more important than that on the desktop because there is no room for error or waste'*. This compares to only 23% who disagree.

Company respondents

Figure 4: 'The quality of the mobile experience is more important than that on the desktop because there's no room for error or waste' – agree or disagree



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 221

Paradoxically, for many businesses, stripping everything down to enable a simple and effective smartphone or tablet experience involves a level of strategic planning and technical complexity which many companies have not yet been able to master. More of this in the next section.

Before companies decide on the strategies and tactics required for optimization, the starting point for businesses is to understand how mobile consumers are interacting with them.

The chart overleaf gives an indication of the extent to which businesses have a grasp of what their customers are doing. On a positive note, the vast majority of responding organizations (89%) have an understanding of how much traffic comes via mobile devices, but this combined

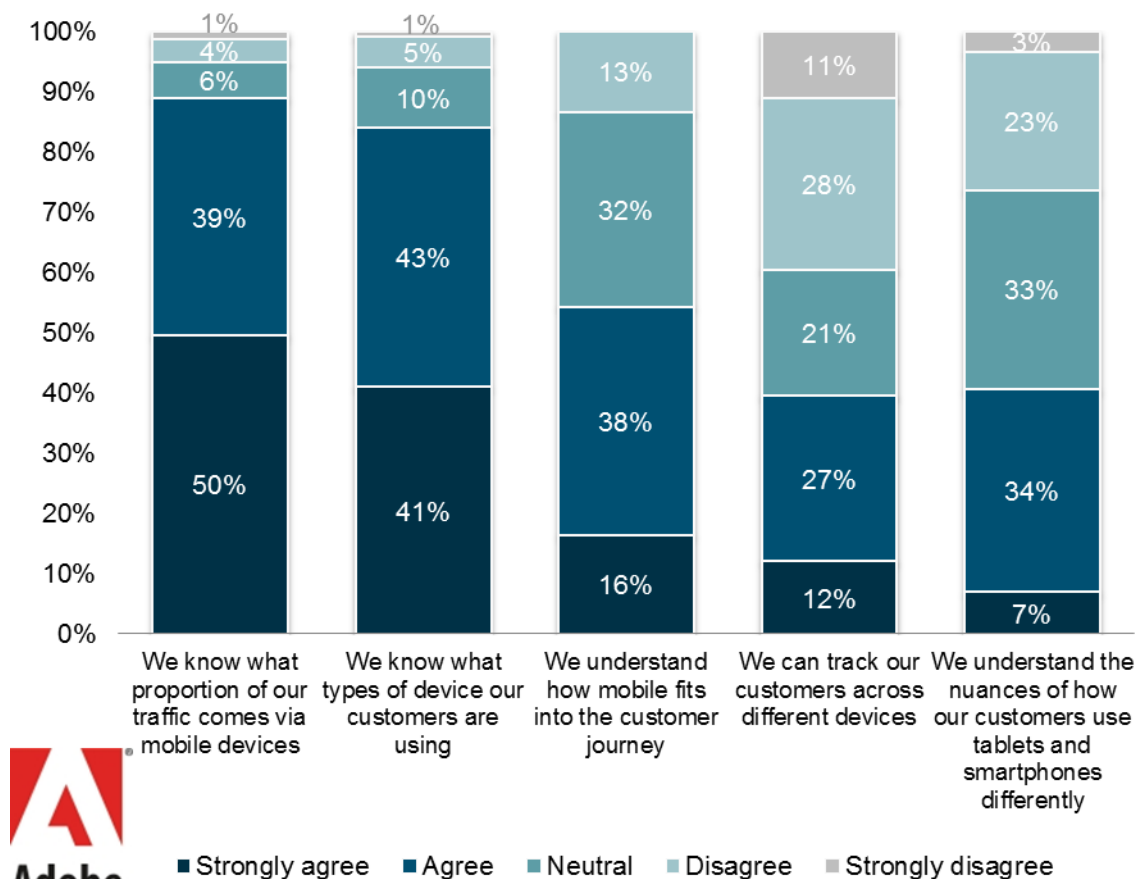
percentage (for 'strongly agree' and 'agree') starts to diminish as we look from left to right across the chart.

While 84% of respondents know what types of device their customers are using, only slightly more than half (54%) claim an understanding of how mobile fits into the customer journey. Fewer still can track their customers across different devices (39%) or understand the nuances of how customers use smartphones and tablets differently (41%).

There should be no doubt that those companies leading the way with smartphone and tablet user experience have done the groundwork in understanding how and when different types of consumer are engaging with them during their customer journeys.

Company respondents

Figure 5: Please indicate whether you agree or disagree with the following statements.



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 234

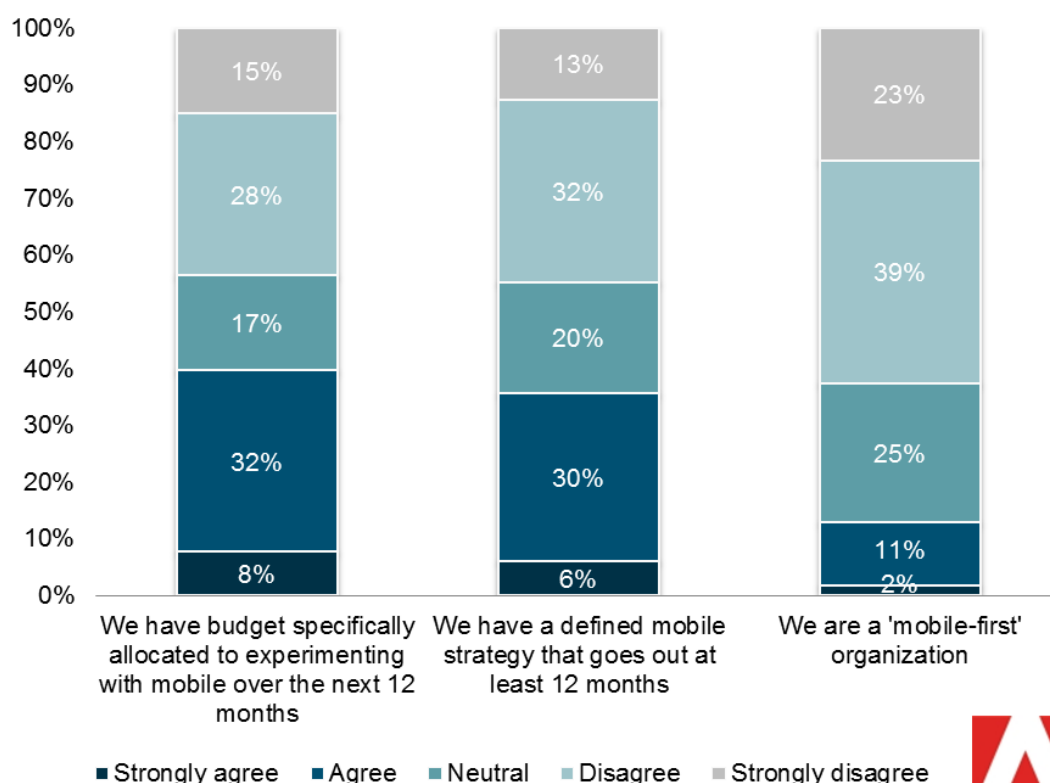
4. Strategy for mobile

In the face of significant change, it's easy to be swept along. The shift to mobile has been rapid and relatively universal across customers and audiences, so it's not surprising that most marketing organizations are flying by the seat of their pants, if not quite flying blind.

Only 36% of respondents currently have a mobile strategy that looks forward at least 12 months, roughly the same number that have budget allocated for mobile experimentation. Digital marketers can be forgiven for not having the time to plan ahead on every front, but the longer they wait to take a strategic approach to mobile, the greater the risk of being caught by the unexpected.

Company respondents

Figure 6: Please indicate whether you agree or disagree with the following statements.



Econsultancy/ Adobe Quarterly Digital Intelligence Briefing



Respondents: 232

One of the challenges in building a strategy for mobile is that it's not simply another channel, it's a platform for interaction and commerce on the same scale as the desktop internet. That means that a mobile strategy has to reflect the entirety of the customer experience today, while looking ahead to tomorrow. But doing that requires knowledge about customers and about mobile that many companies haven't yet acquired.

For those trying to formulate their mobile strategy for the first time, it may be easiest to start with three guiding principles:

1. You need to know everything. One goal of your initial mobile strategy should simply be knowledge gathering. This process starts with the data – on usage, behavior, purchase, etc., but has to get to the point of answering 'why'.



2. A good strategy lets you know when to say ‘no’. When it’s operational, a strategy document is simple and clear enough that anyone on a team can use it as a proxy for the leadership team. Does a partnership experiment make sense? Does a development strategy have to be platform neutral? How much scale should be built into plans for 2015? These are the sorts of questions that should be easy to answer, if there is a well-thought-out strategy that’s easy to understand and readily available.
3. It goes almost without saying that no strategy is perfect or complete, let alone in a rapidly evolving area. Regular revisits should be planned for and kept. These meetings can be used as goalposts for information gathering goals.

For example, start each strategy session with a presentation of a new data point or information gathering capability: “Now we know that while currently 65% of our mobile visitors also use the desktop site, that number is down from 80% in just six months”. This is the kind of statement that should inform and modify strategy.

Figure 7: Who is directly responsible for mobile optimization within your / your clients’ organization(s)?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing



Company respondents: 225
Agency respondents: 165

Having multiple stakeholders can complicate strategy development, but the results are worth the pain of integrating these disparate players. Econsultancy’s research suggests that those who use input from multiple departments/teams to develop their mobile strategy are more likely to achieve desired KPIs and feel more positively about their mobile user experience than the average.¹

¹ <https://econsultancy.com/reports/mobile-sophistication-and-strategy>

5. Responsive for the win?

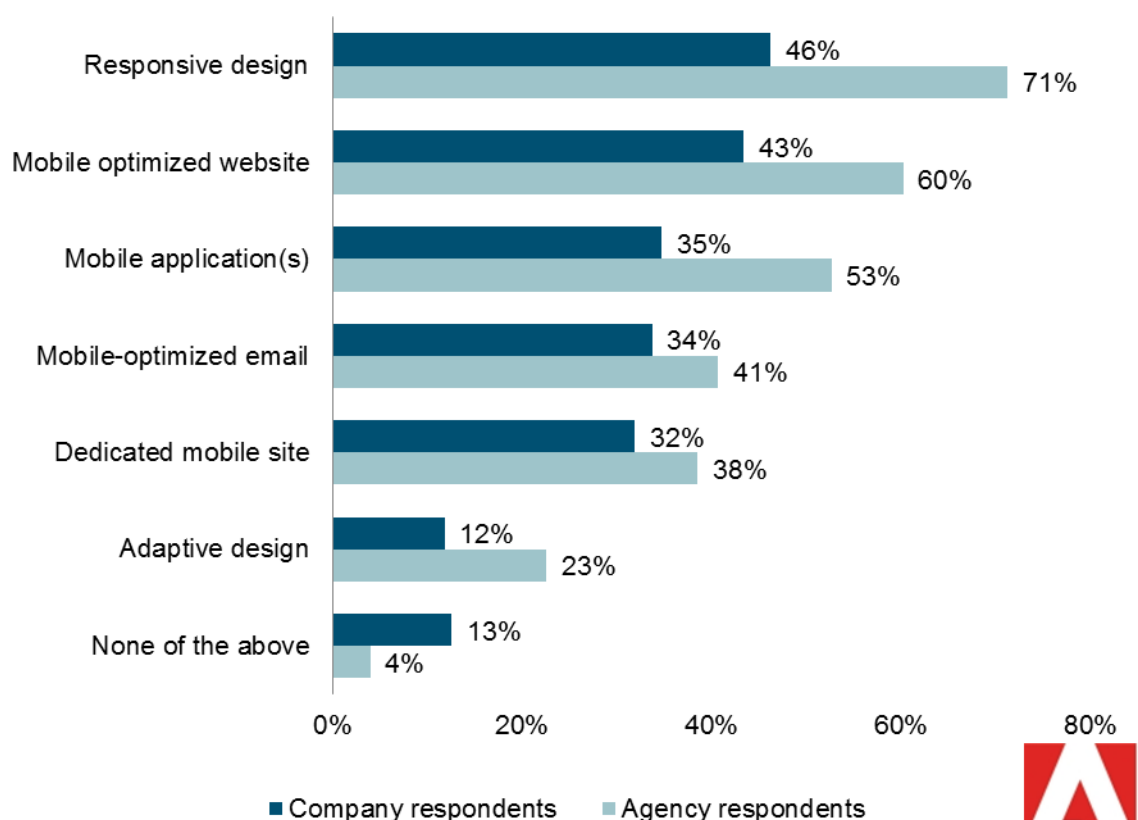
Intense debate continues within many organizations about the merits of different mobile optimization options. Is responsive web design (RWD) a clear winner or are more device-focused approaches (such as adaptive design) making more leeway?

RWD uses fluid design to dynamically change the visual display based on the device that is accessing the website, providing an optimal user experience across desktop, tablet and mobile devices using a single code base. Adaptive design uses responsive techniques to adapt to different screen sizes but also customizes the user experience based on device-specific capabilities and the unique requirements of users at device-level.

A dedicated mobile site uses a separate code base to enable the mobile user experience to be fully customized. Using mobile optimization, developers create a separate mobile site rather than using responsive techniques to scale the main desktop site to fit within mobile browsers.

Almost half (46%) of companies surveyed for this research are now using responsive design as part of their attempts to optimize for mobile, with a similar proportion (43%) using mobile-optimized websites. Only 12% of organizations indicate they are using adaptive design.

Figure 8: Which of the following have you / your clients employed as part of your / their attempts to optimize for mobile?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing



Company respondents: 279
Agency respondents: 226

Based on almost 200 verbatim responses, we summarized the main advantages and disadvantages of responsive design techniques (*Table 1*). One respondent was particularly vehement in his efforts to emphasize the importance of adopting RWD and the benefits it brings:

“The pros outweigh the cons so much, that it is almost moot to ask the question nowadays. With a plethora of devices and screen resolutions, it is important to not multiply versions covering different devices, but to create a single version that responds to the device and renders optimally. There is a learning curve for doing this well, but it is not steeper than the many hacks web designers and developers have been used to all these years. Finally, there are many frameworks with lively communities helping bridge the gap between novices and seasoned coders. I see no reason or excuse to skip on responsive design at this time.”

What many marketers fail to grasp is that end users don't care whether websites are built using responsive or adaptive frameworks as long as they receive the customer experience they expect and achieve what they want as quickly and easily as possible. As with many things mobile, there isn't always a clear overall winner, it all depends on the business and objectives.

Matt Andrews, a developer working for The Guardian, emphasized four key points around mobile optimization and responsive design² that companies need to remember:

1. **Focus on what is core** for your application / website... and make it really, really quick. Anything non-core can come later.
2. Don't be afraid to **build multiple experiences**: segment your users and build around features, not in spite of them.
3. **Release early and often**: don't spend forever with your code behind locked doors.
4. **Question assumptions**: this is a new web, start from scratch... including responsive design itself. It won't always be like it is today!

Table 1: Pros and cons of responsive web design: what survey respondents say

Pros	Cons
User experience <ul style="list-style-type: none"> ● Encourages simplicity ● Provides a consistent, device-neutral experience ● Better user experience delivered through consistent navigation / content structures 	Design and development <ul style="list-style-type: none"> ● Longer development time and more difficult testing process ● Some limitations in design and layout
Scalability and versatility <ul style="list-style-type: none"> ● Is suitable for virtually all devices going forward without having to account for different makes and models (except some degree of future-proofing) ● No predetermined scaling restrictions 	Performance <ul style="list-style-type: none"> ● Inability to support the strengths of specific devices ● Bandwidth issue for devices that are on a slow connection ● May not result in optimization across <i>all</i> devices
Development and maintenance <ul style="list-style-type: none"> ● Requires a single site build ● Single code base to manage and support ● Easier to manage for multiple websites / devices ● You only need to manage one set of content 	User experience <ul style="list-style-type: none"> ● One-size-fits-all doesn't always lead to the best designs and user experience ● Overall site content not streamlined for the mobile experience ● Web ads or videos might not be smooth / fluid
SEO <ul style="list-style-type: none"> ● Works well for Google rankings ● Streamlines on-page SEO strategies ● Search engine indexing is easier since content is not duplicated 	Making trade-offs <ul style="list-style-type: none"> ● Can result in compromises that don't make the best use of each device ● Difficult to get the right balance of usability on both mobile and desktop

² <http://mattandrews.info/talks/port80-2013/>

Figure 9: What is the main barrier to success when it comes to effectively optimizing your mobile web presence?

[illegible]

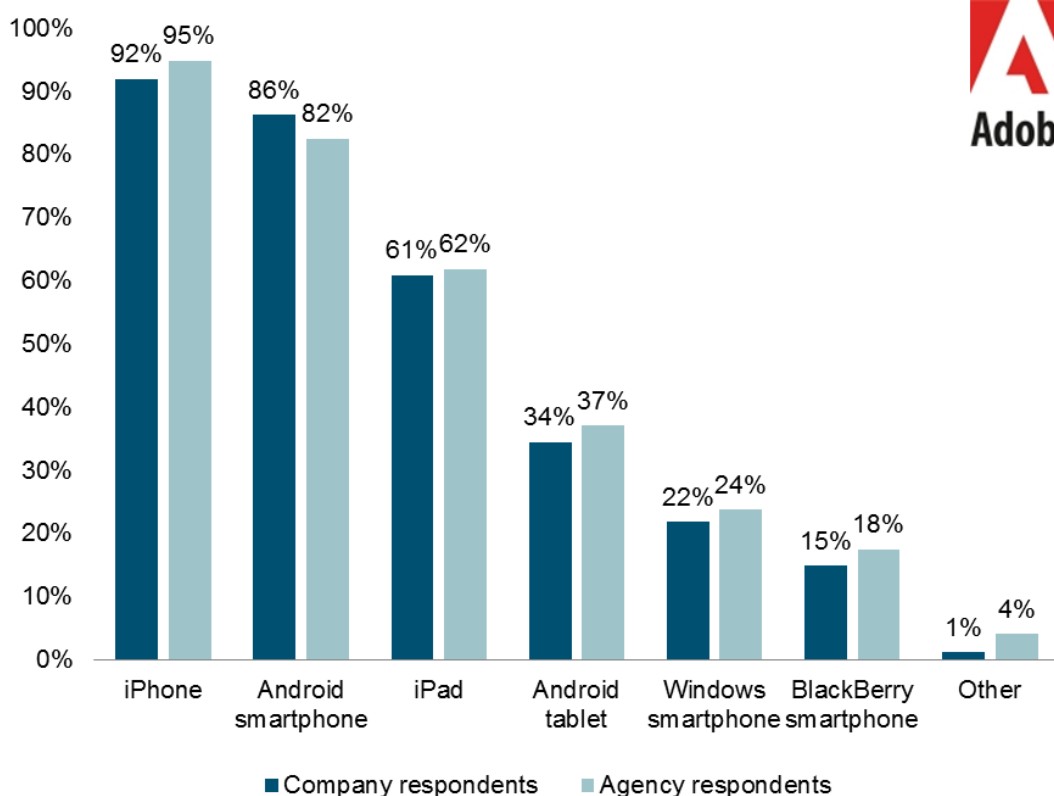
6. Apps are alive and kicking but some still in search of a meaning

In June 2007, Apple launched the iPhone and in 2008, the first commercially available Android smartphone was released. Today, more than half of all adults in Western Europe and North America own a smartphone and on average they use it for more than two hours a day.³ Research from Adobe also shows that consumers spend more time on apps and access them more frequently than the mobile web.⁴

Apps are a key component in enabling the rich experiences that smartphones offer consumers today, whether these apps are native, hybrid or web-based. As shown in *Figure 8*, 35% of responding companies say that they have deployed apps in an effort to respond to their rapid adoption by consumers; these respondents were then asked further questions for this study.

As seen in *Figure 11*, the most popular operating system for which apps have been developed is the iPhone, with more than nine out of 10 companies catering for this device. The proportion building apps for Android smartphones is slightly lower (86%), followed by iPad (61% of companies) and Android tablets (34%). Curiously, this stands in opposition to market share of smartphone and tablet operating systems, where numbers of Android devices outnumber those running iOS.⁵

Figure 11: Have you / your clients built apps specifically for any of the following?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 87
Agency respondents: 97

³ Data taken from Econsultancy's Internet Statistics Compendium

<https://econsultancy.com/reports/internet-statistics-compendium>

⁴ http://www.cmo.com/articles/2013/11/6/mobile_app_users_mos.html

⁵ http://gs.statcounter.com/#mobile_os-ww-monthly-201304-201403

Another point of note from the research is that 40% of companies have the same business objectives for apps and mobile-optimized sites (*Figure 12*); the same proportion state that the experience offered between their mobile apps and desktop websites is broadly similar (*Figure 13*). Similar findings were seen in previous Econsultancy research,⁶ where it was noted:

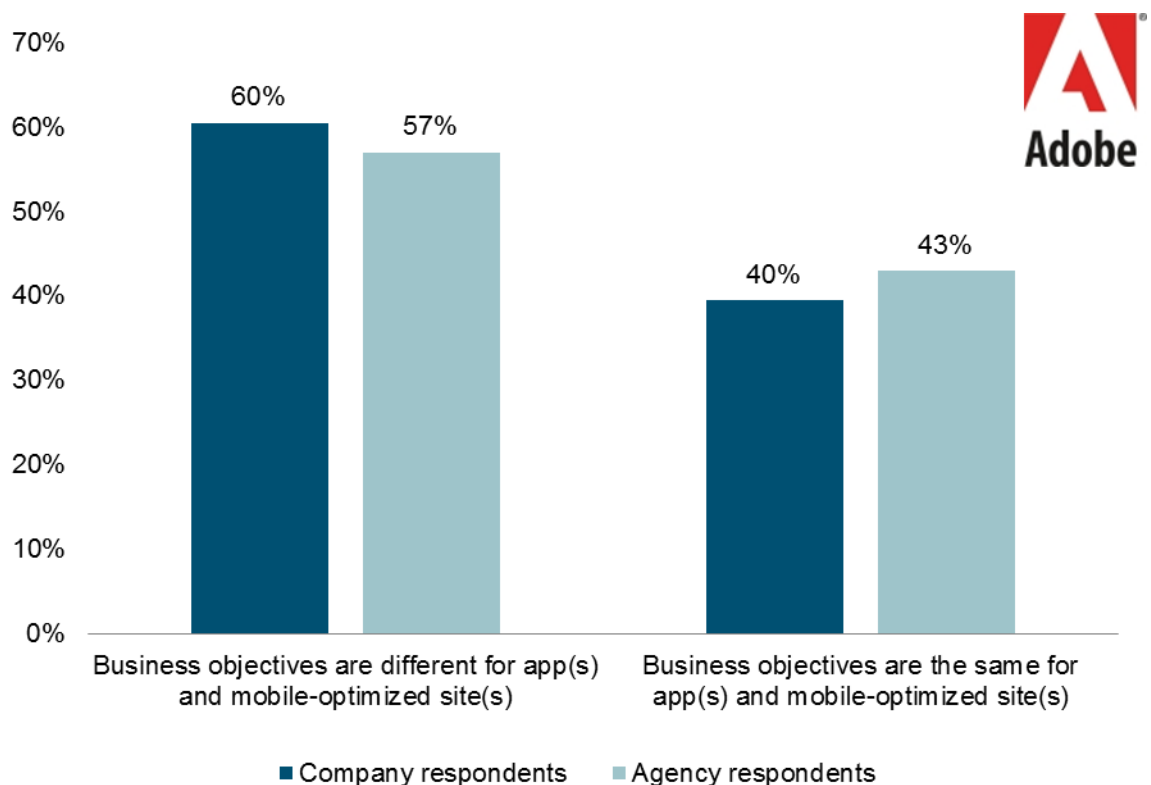
“Generally speaking, mobile experience experts advise that the mobile experience should be unique to the platform... But many companies that moved into their mobile development quickly ended up with their experiences modelled on, or even slavish to, their existing sites.”

Ray Pun, strategic marketing lead for mobile solutions across the Adobe Marketing Cloud, also emphasized the importance of thinking mobile unique:⁷

“As a CMO, your mobile strategy should include not only the choice of which channels to invest (e.g. mobile apps, mobile sites), but also the level of personalization provided by these experiences. A vanilla experience has implications in terms of opportunity cost, branding and loyalty.

- *Revenue lift: how much incremental revenue will be lost if we don’t personalize?*
- *Brand image: will the customer perceive that my brand lacks innovation and customer focus?*
- *Customer loyalty: will my customer leave my mobile experience and switch to a competitor’s?”*

Figure 12: Are the goals for your / your clients’ mobile apps and mobile sites similar or different?



Econsultancy/ Adobe Quarterly Digital Intelligence Briefing

Company respondents: 131
Agency respondents: 122

⁶ <https://econsultancy.com/reports/mobile-sophistication-and-strategy>

⁷ http://www.cmo.com/articles/2013/4/19/think_mobile_unique_.html#

With these facts put together, this information suggests that while a good deal of companies have been jumping on the app bandwagon, a significant proportion have done so without a clear and distinct understanding of what they wish to achieve. Given the time and investment required in developing apps (as shown in the free text responses below), these actions are likely to represent missed opportunities at getting their investment in mobile right.

What do you see as the pros and cons of the type of apps you have developed?

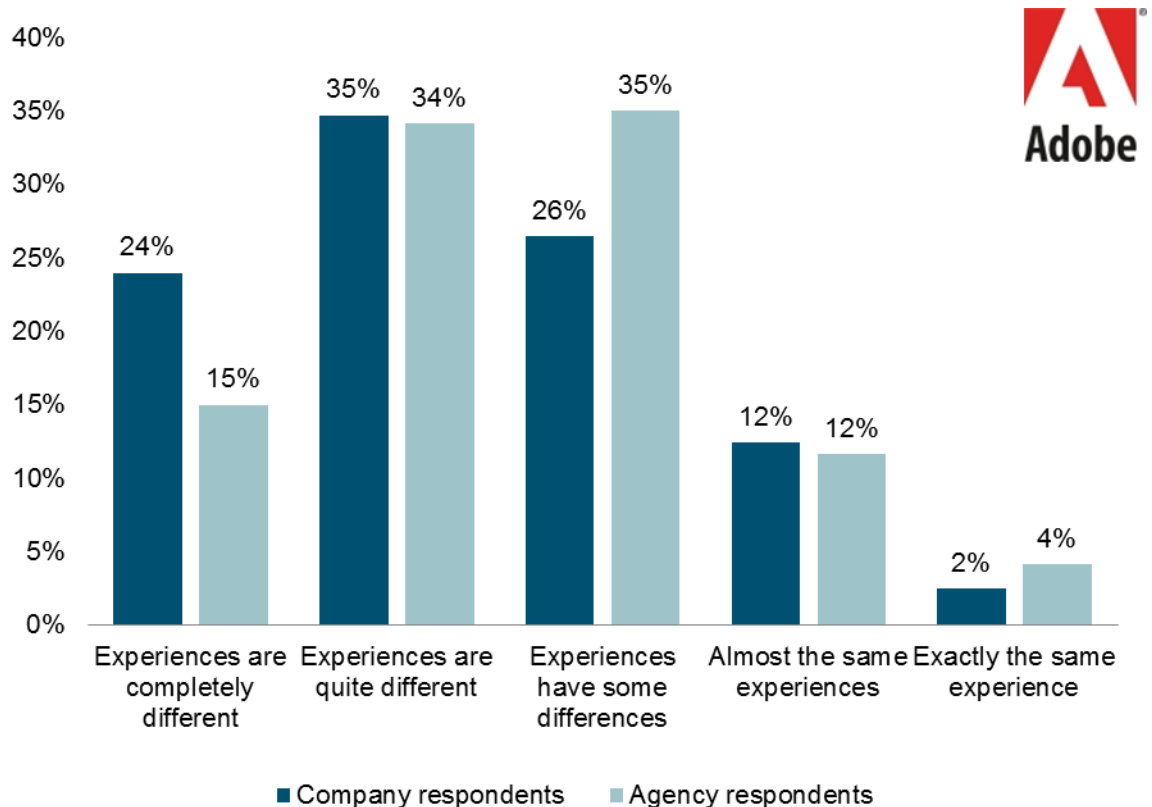
“Maintaining our apps for upgraded operating systems is time-consuming.”

“Native apps are expensive to maintain and customers must be searching for you (or marketing has to be supporting).”

“There is still a tendency to build native apps for the sake of it – duplicating web functions and not really enhancing customer experience.”

Survey respondents

Figure 13: To what extent is your / your clients' mobile app experience similar to the desktop website experience?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 131
Agency respondents: 122

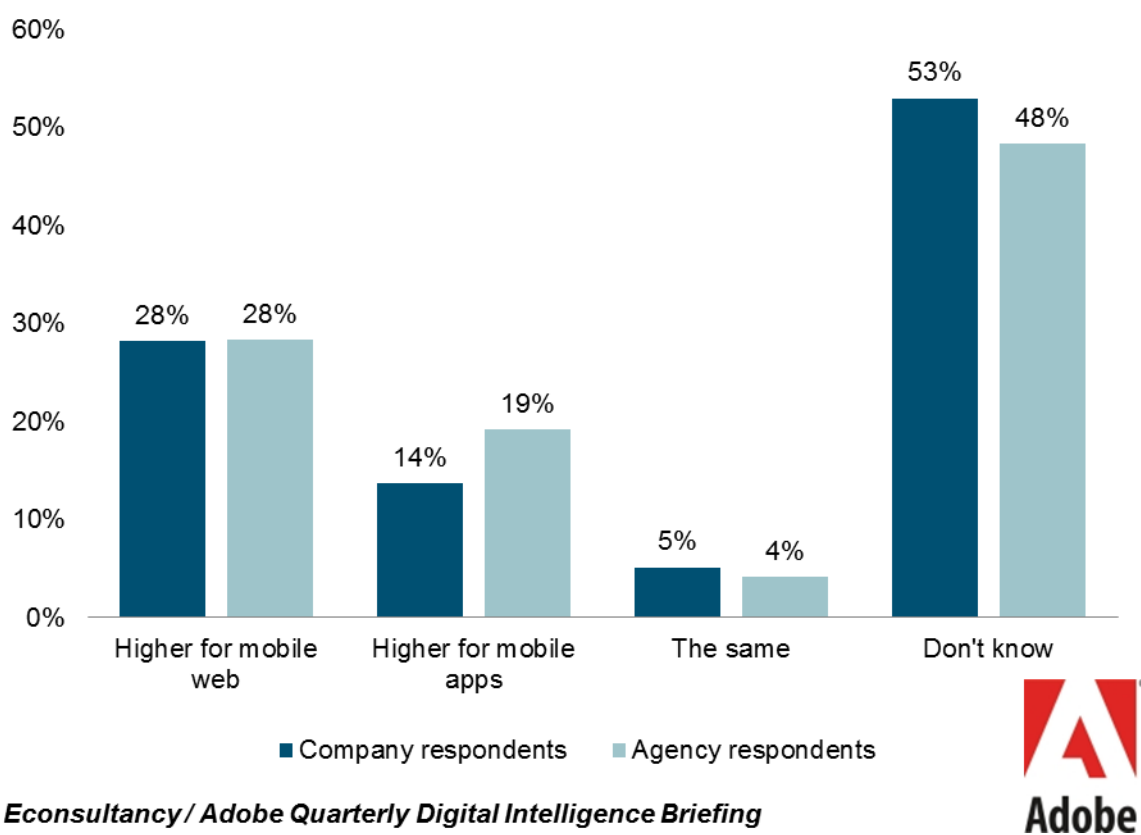
7. Measuring and optimizing apps leaves many in the dark

One oft-quoted adage that resonates strongly within digital is “You can’t manage what you don’t measure.” Measurement is key to benchmarking and improving performance over time and is one of the major benefits of digital versus traditional marketing.

It would therefore be expected that for their digital efforts, companies would have a good understanding of how effective they are. Unfortunately, this research suggests that for apps, many companies are in the dark.

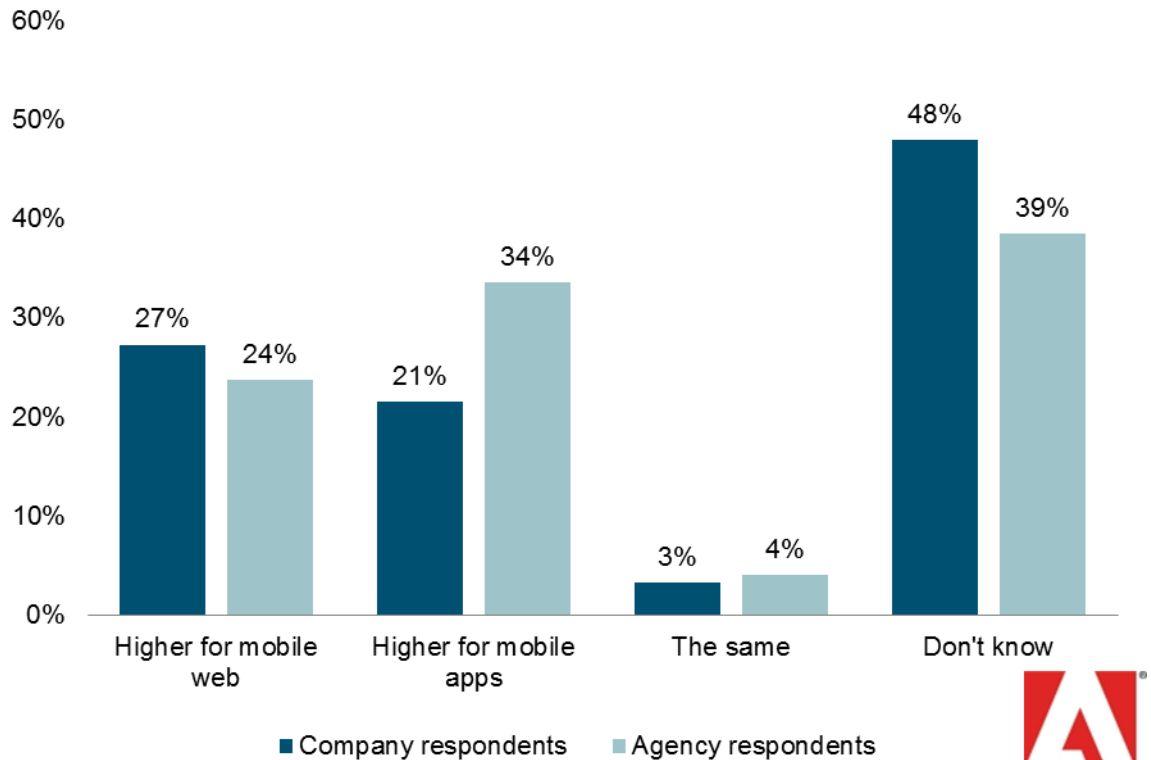
Figure 14 and *Figure 15* show that for conversion rates and time spent per session, around half of companies just do not know how the performance of mobile apps compares to the mobile web. In addition to this, *Figure 16* shows that only around a quarter of respondents (27%) agree that they can measure success and ROI of mobile apps as well as they can for their website.

Figure 14: Are conversion rates higher for mobile apps or for the mobile web?



Company respondents: 130
Agency respondents: 122

Figure 15: Is time spent per session higher for mobile apps or for the mobile web?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing



Company respondents: 130

Agency respondents: 123

An issue and a risk for mobile app development is that companies are at the mercy of those who control app marketplaces and the terms and conditions they place on those who release apps. Simon Andrews of mobile agency addictive recently highlighted a particularly difficult issue for iOS apps:

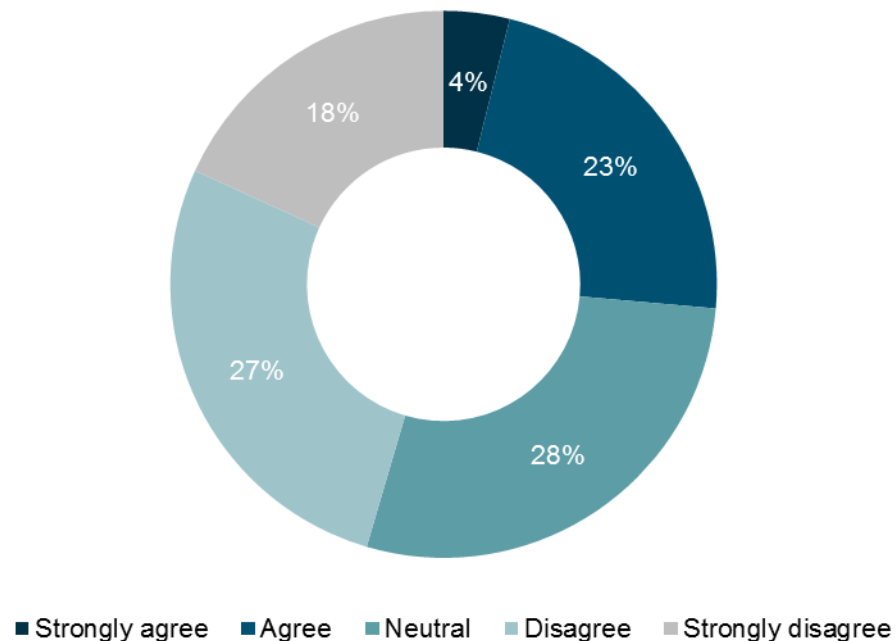
“One salvation in mobile was the UDID (Universal Device ID) – but Apple stopped apps from accessing that last year. The IDFA (Identifier for Advertising) introduced by Apple was more usable and didn’t have the same security worries. Now the usefulness of that is reduced as Apple no longer allow apps to use this info unless they sell advertising. Which means that these apps can’t track where a download came from.”⁸

While this continues to be seen as a significant challenge, forward-thinking platforms are trying to connect the dots and remove the guesswork out of measurement by allowing organizations to track the path users take from mobile ad to download.

⁸ <http://www.addictivemobile.com/blog/2014/02/14/tracking.html>

Company respondents

Figure 16: 'We can measure success and ROI of mobile apps as well as we can for our website' – agree or disagree



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

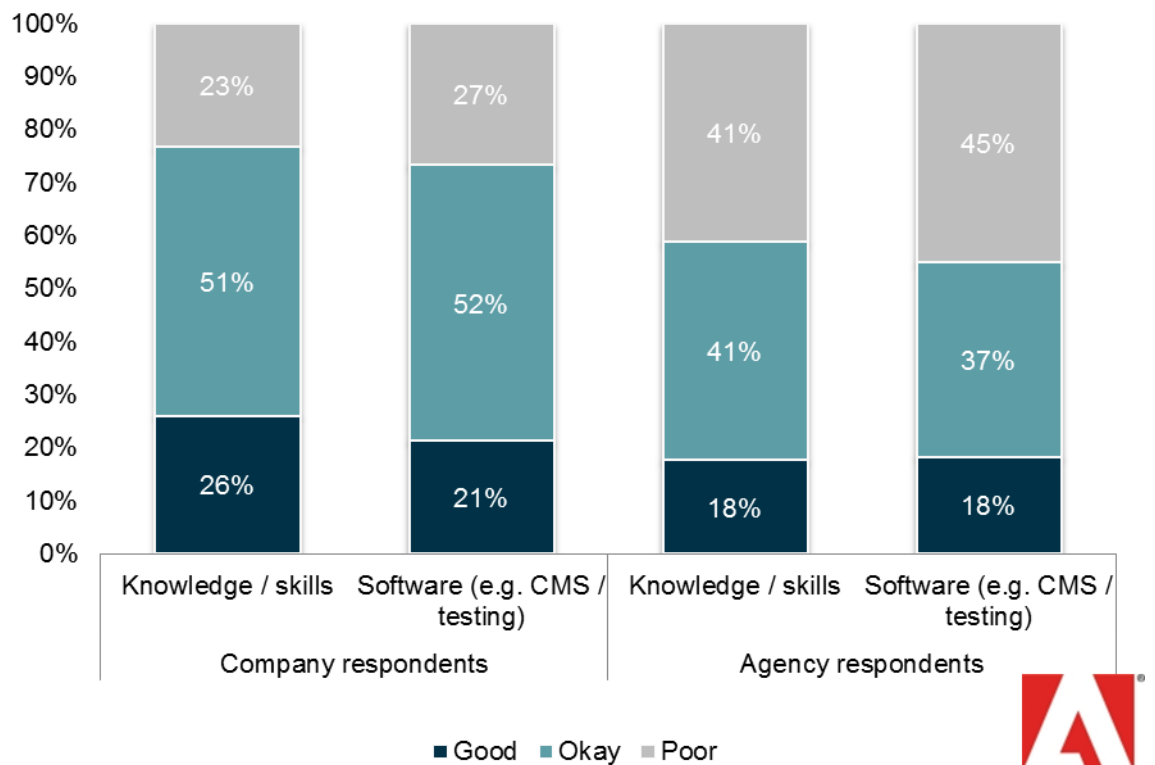
Respondents: 130

Companies should be aware that the same level of measurement, optimization and targeting capabilities are available for mobile as for the desktop web. Analytics, A/B and multivariate testing, and targeting are all being deployed across mobile web and in-app by forward-thinking companies.

In addition to a lack of understanding over key conversion rates, *Figure 17* shows that companies are limited in their ability to optimize their mobile applications. This is both in their *knowledge and skills* (just 26% of companies rate their ability as 'good' here) and in *software* (just 21% rate their ability as 'good'). Agency respondents paint a similar picture based on their clients.

This shows that the rapid rise of mobile has caught companies off-guard and that the majority have failed to put in place the requisite people, processes and technology to deal with new customer behaviors. As mobile becomes the new norm, companies which fail to adapt will find themselves out of line with the expectations of their customers.

Figure 17: How do you rate your / your clients' ability to optimize your / their mobile applications?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing



Company respondents: 75
Agency respondents: 85

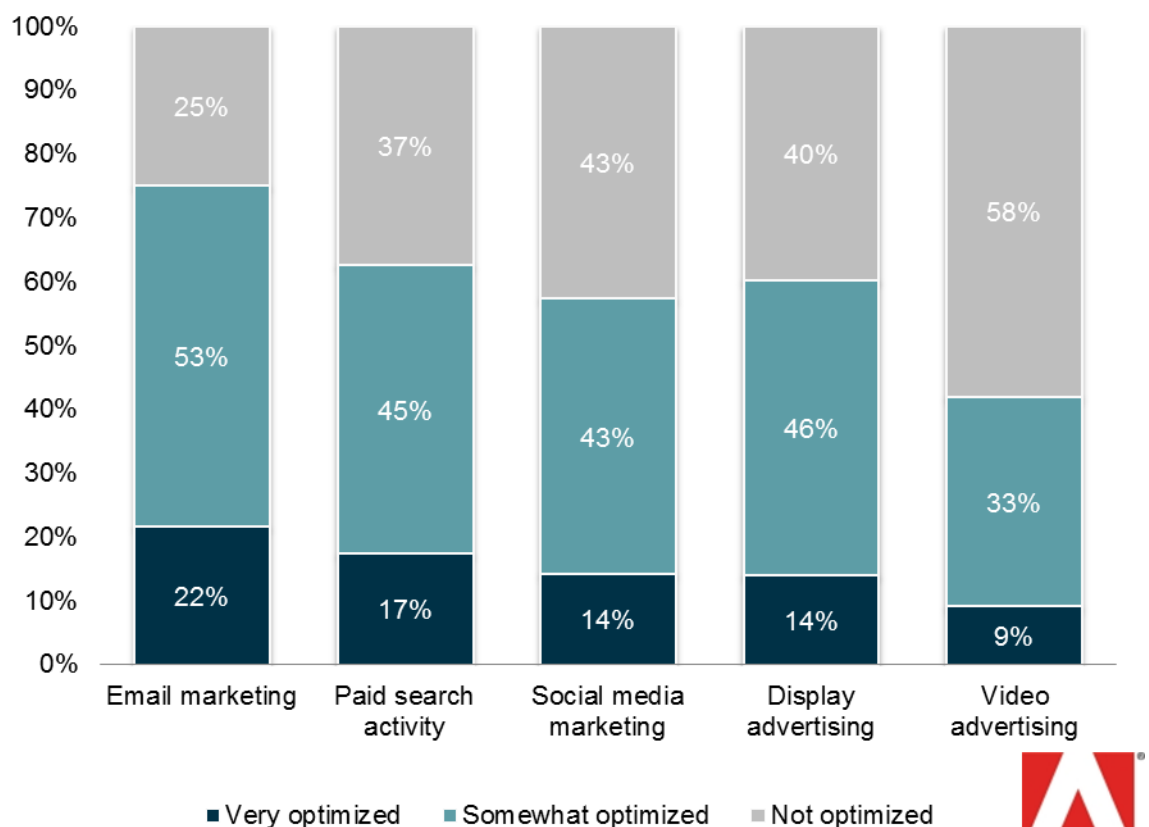
8. Mobile optimization... not just about the website and apps

As a platform, mobile includes everything from the tried and true (email and paid search) to the emergent (mobile video). For many companies, optimization of these activities is at least as important as their app and mobile site development, for now at least.

But only a small percentage of marketing organizations have achieved a high level of channel-level optimization. Email is the most familiar and the most optimized, but even there only 22% consider the channel to be 'very optimized' for mobile. The rate of optimization falls from there, and is lowest for video advertising, where nearly 60% practice no optimization at all.

Company respondents

Figure 18: To what extent do you optimize the following digital activities and disciplines for mobile?



Econsultancy/ Adobe Quarterly Digital Intelligence Briefing



Respondents: 208

Optimization for mobile should be addressed at each stage of a marketing campaign or ongoing program.

At a fundamental level, every element of the campaign has to be viewed through the context of short attention spans, limited real estate and a reluctance to click or type at length. A mobile-optimized campaign for any of the major channels begins with these limitations in mind and keeps them front and center.

Understanding the differences in mobile user behavior and the often unique makeup of the mobile audience are essential to **match offers with channels and media**. For example, low

consideration products are likely to convert better as direct sales than those that require more thought and research, just as simple offers (20% off anything in store) may make more sense than a two-step rebate. In this regard, paid search ad design may be the best historical model – short, nearly atomic copy that’s easy to understand and act on.

Mobile-specific design for any channel begins with a focus on issues of rendering and simple usability, many of which can be compensated for by using mobile-optimized landing pages instead of placing the burden on the ad units themselves.

Many channels offer opportunities for location-specific messaging and dynamic content based on device or user data. Especially in the case of display and video advertising, knowing whether the consumer is lounging with their tablet on a Wi-Fi connection or running through the supermarket makes an enormous difference to the kind of creative that can or should be served.

Mobile optimization at the **deployment stage** boils down to patient analysis and testing. This begins by understanding how mobile KPIs may differ from the desktop, and identifying any gaps in the data that might require proxies. For example, a high consideration product may resist direct purchase, but can spark searches, scrolling or another kind of meaningful engagement that can be used for benchmarking.

Once reliable measures have been agreed upon, a baseline can be established and the process of iteration and optimization can begin. Segment analysis and site optimization are likely to be the highest impact areas to focus on, but once those are in hand, device-level improvements can also be significant.

9. The glue of multichannel retail

While some retailers are struggling to drive incremental growth, others are tackling the explosive use of mobile devices and the showrooming phenomenon head on, by integrating mobile into the shopping experience and using it to bridge the physical and digital worlds.

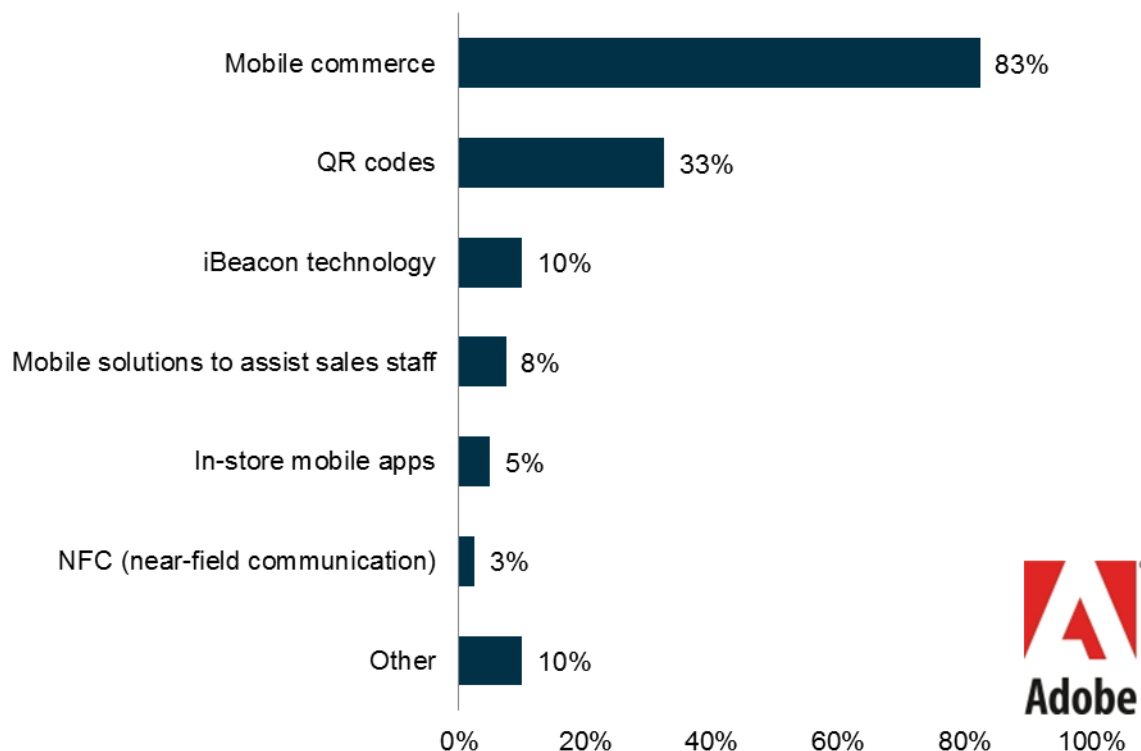
In a bid to dominate the physical retail experience, key players in the technology arena have been quick to launch solutions that make the shopping journey and in-store payments hassle-free for consumers. For example, PayPal and Apple announced the introduction of Beacons, low-cost Bluetooth devices that allows retailers to prompt customers with promotions, product information or to speed up checkout via a contactless payment system.

According to recent research by Deloitte, the next few years will see the influence of mobile in retail stores growing exponentially to 17%-21% of total retail sales, which will likely translate to around \$700 billion in mobile-influenced store sales by 2016.

Tell this to a retail executive and they'll immediately rush to conclusions, thinking that the most significant impact consists of direct sales generated through the mobile channel. As seen in *Figure 19*, findings from our research support this. When retail respondents were asked to identify the mobile channels and technologies they are using, mobile commerce came on top (83%), while those using sales-assisting tools like QR codes, iBeacon technology or in-store mobile apps are in the minority.

Company respondents – retail sector only

Figure 19: Which of the following mobile channels and technologies are you using?



Econsultancy/ Adobe Quarterly Digital Intelligence Briefing

Respondents: 40

While direct sales from mobile are definitely a reality, mobile is arguably a more significant influencer of traditional in-store sales, either by driving in-store conversions or having an impact

on the average basket size. For example, research by Google Shopper Council and M.A.R.C. Research compared the in-store purchases of moderate and frequent smartphone users and found that basket sizes of frequent mobile shoppers were 25-50% higher.

It's obvious that most retailers are failing to focus on one key area: supporting self-service mobile functionality in-store or providing sales staff with mobile solutions so they are able to assist shoppers and therefore drive conversions.

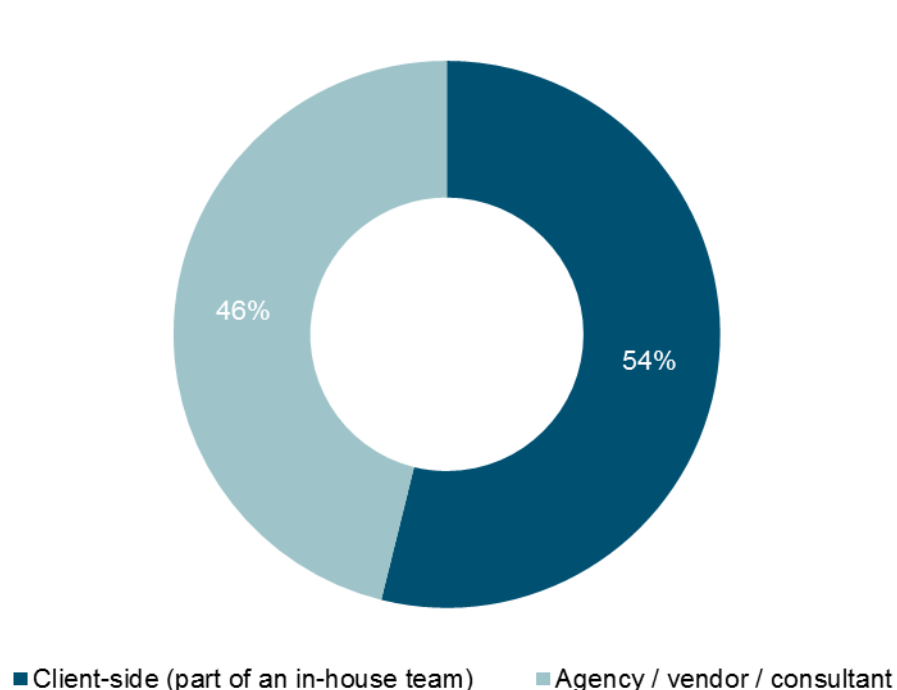
Some retailers (for example, Wal-Mart) have mobile apps which detect when shoppers are in-store and help them find deals or products (sometimes even providing details about real-time inventory). Others give iPads to sales assistants to help shoppers order online if the products they're looking for are no longer in stock in stores.

Whatever the tactics retailers opt to implement, it's clear that mobile is changing the in-store customer journey. Forward-thinkers already understand that using mobile to assist decisions in-store, one physical shelf at a time, means they're owning (and influencing) a portion of the shopping journey that was rather inaccessible until a few years ago. Winners will be those who provide a personalized service beyond the realms of online.

10. Appendix – Respondent Profiles

This 13th Quarterly Digital Intelligence Briefing is based on an online survey of 596 client-side and agency respondents, carried out in March and April 2014. The survey was promoted by Econsultancy and Adobe to our respective databases of marketing and digital professionals.

Figure 20: Which of the following best describes your company or role?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

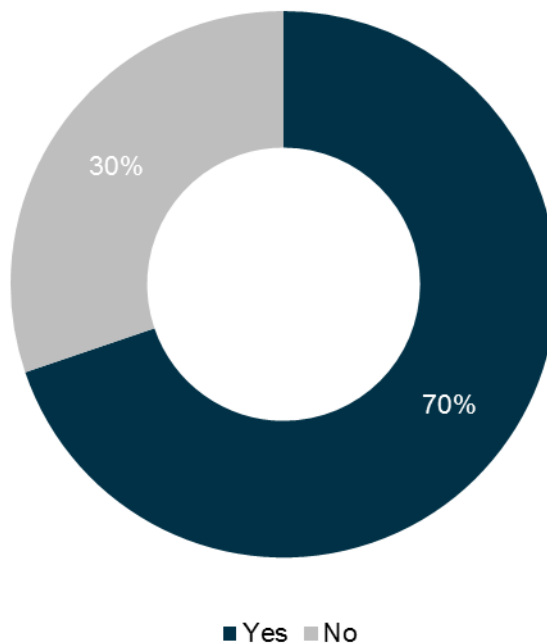
Respondents: 596

10.1. Transactional website

The majority (70%) of companies surveyed have transactional websites.

Company respondents

Figure 21: Does your organization have a transactional website?



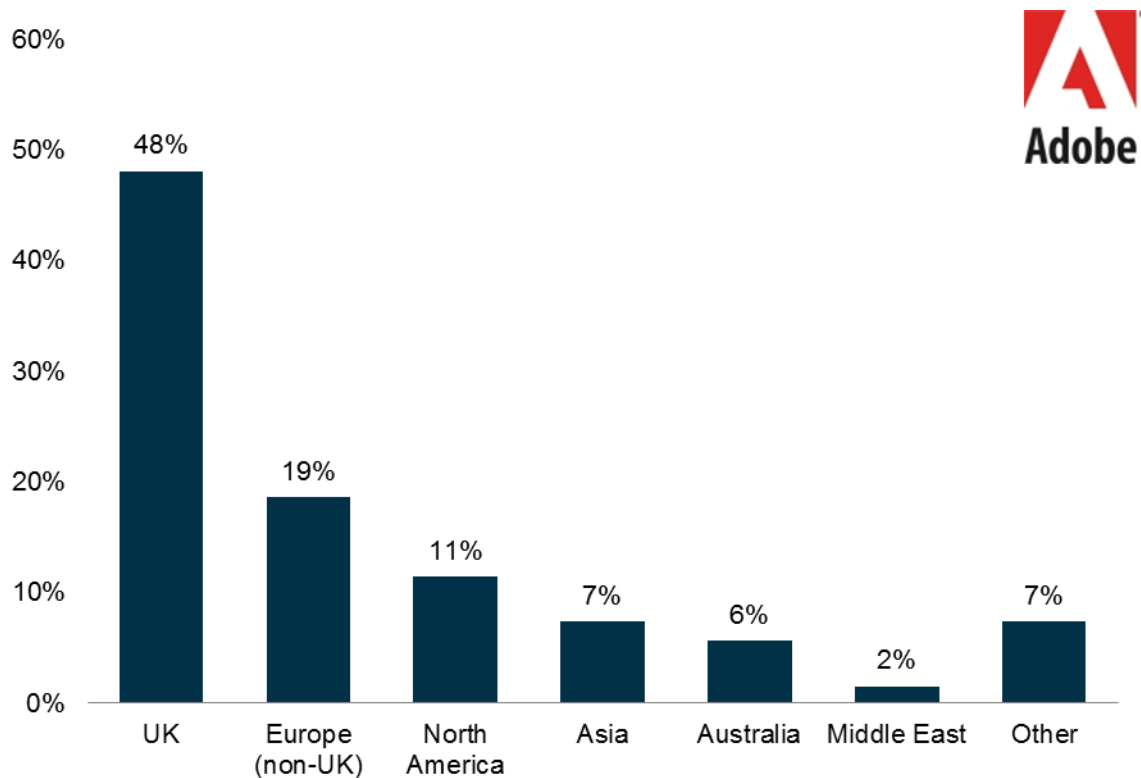
Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 311

10.2. Geography

Just under half (48%) of respondents are based in the UK. A fifth (19%) are based elsewhere in Europe, 11% in North America and 7% in Asia. Other countries and regions represented include Australia, the Middle East and South America.

Figure 22: In which country / region are you based?



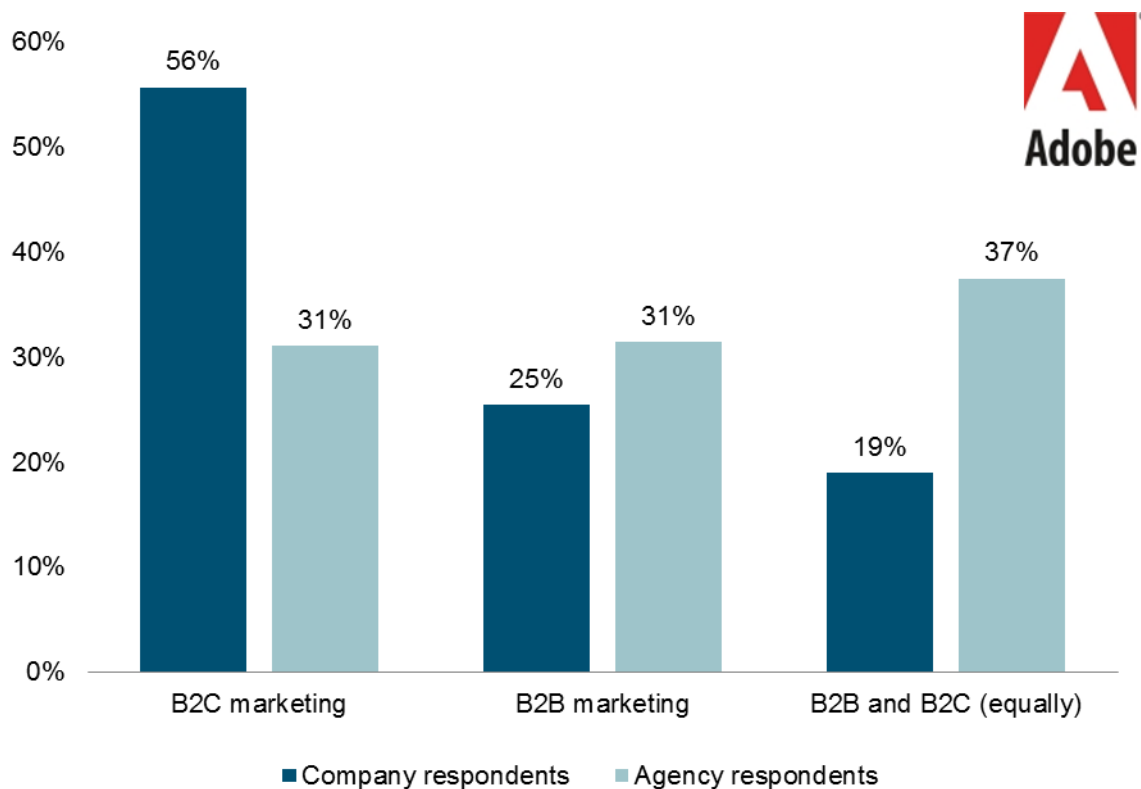
Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 393

10.3. Business focus

Just over half (56%) of company respondents are focused exclusively on B2C, while a quarter (25%) are B2B-focused. A fifth (19%) are focused equally on both B2B and B2C.

Figure 23: Are you more focused on B2B or B2C marketing?



Econsultancy / Adobe Quarterly Digital Intelligence Briefing

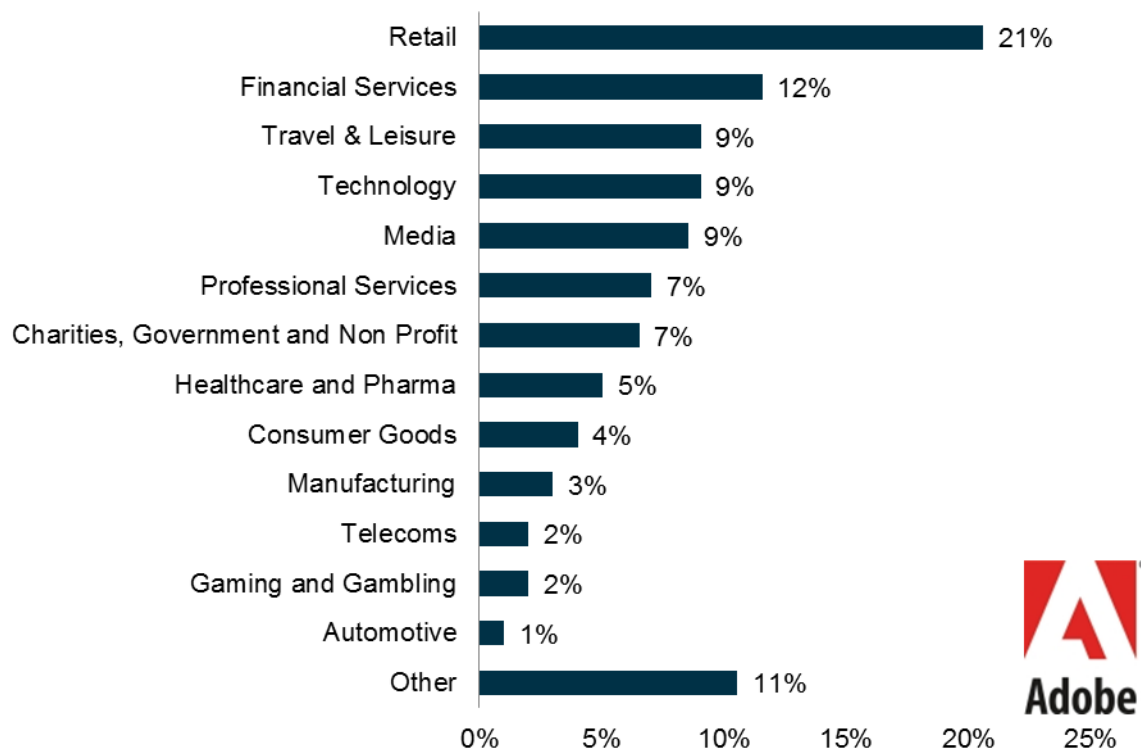
*Company respondents: 311
Agency respondents: 267*

10.4. Business sector

Respondents work across a wide range of different industry sectors. The best represented sectors are *retail* (21%), *financial services* (12%), *travel & leisure* (9%), *technology* (9%) and *media* (9%).

Company respondents

Figure 24: In which business sector is your organization?



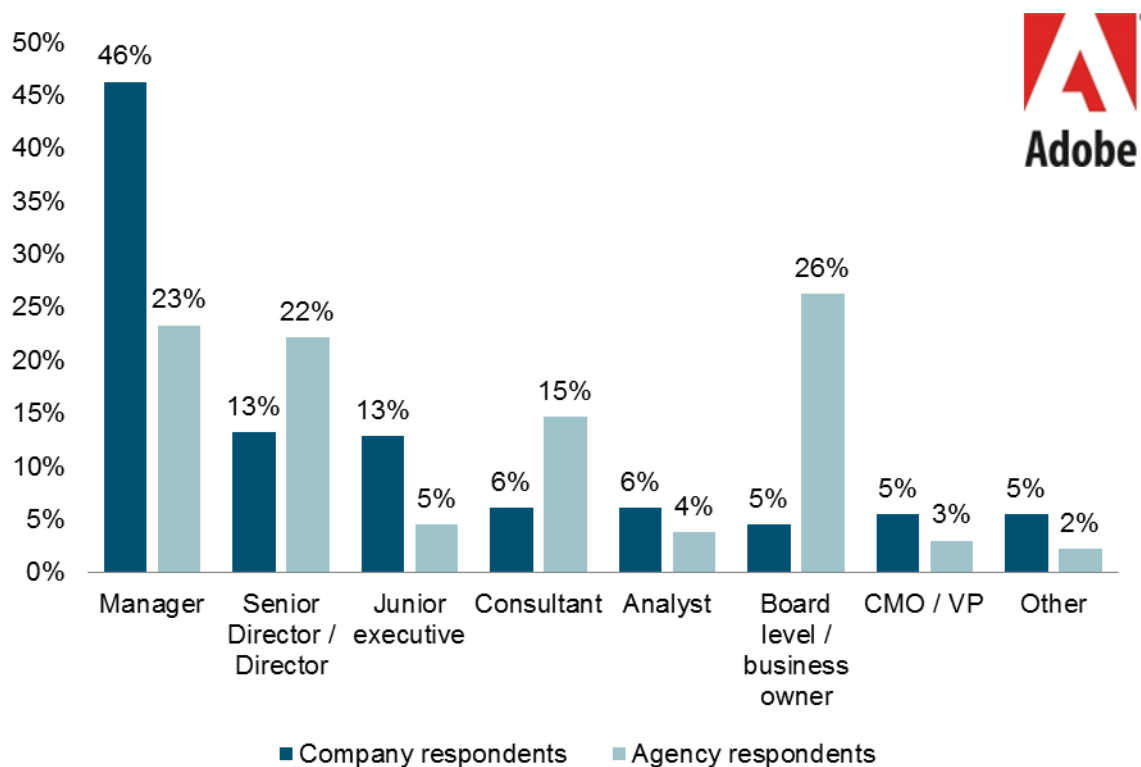
Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Respondents: 310

10.5. Job roles

The survey had a senior audience, as shown in the chart below. Just under half (46%) of responding organizations are *managers*, while 13% hold *director* or *senior director* positions. Additionally, 5% are *business owners* or have *board level* roles.

Figure 25: What best describes your position at your company?



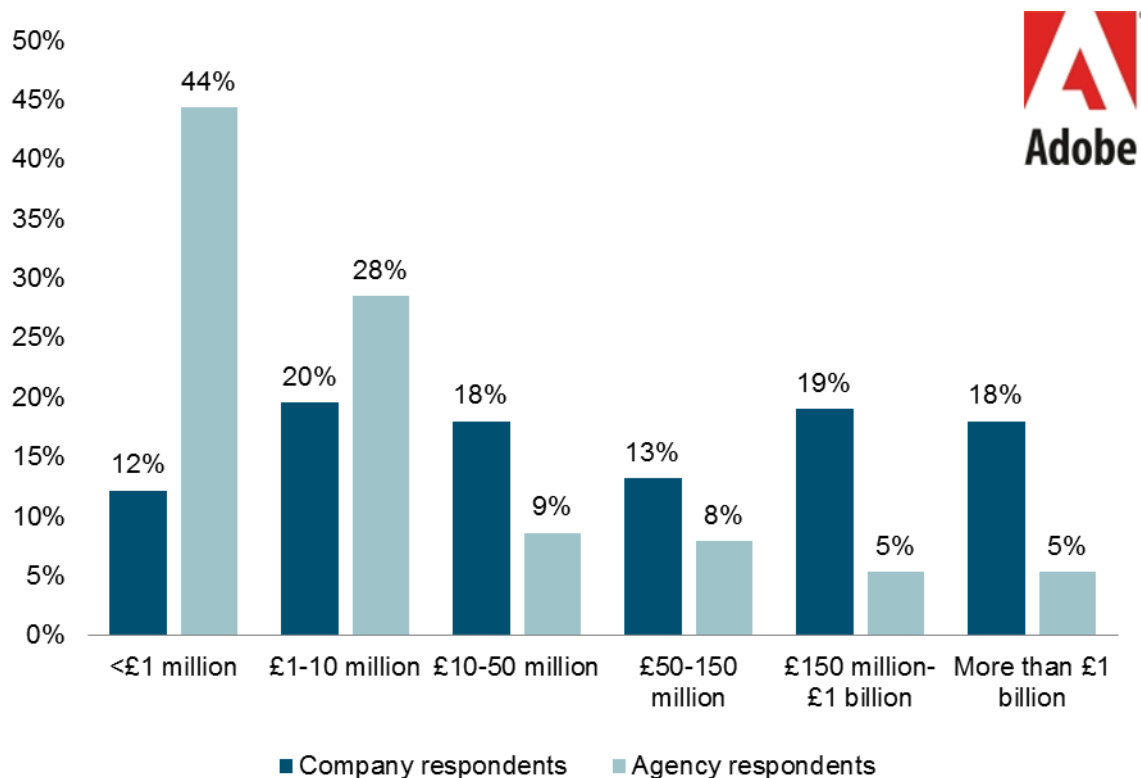
Econsultancy / Adobe Quarterly Digital Intelligence Briefing

Company respondents: 311
Agency respondents: 266

10.6. Size of company by revenue

The chart below shows the annual revenue of responding companies. At the upper end of the scale, half of company respondents have annual revenues of more than £50 million.

Figure 26: What is your annual company revenue?



Econsultancy/ Adobe Quarterly Digital Intelligence Briefing

*Company respondents: 223
Agency respondents: 165*