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State of Customer Experience in High Tech B2C in an AI-Driven World

A strategic guide to enhancing customer engagement in a fast-evolving tech landscape

Foreword

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In High Tech B2C, innovation has always been the product. But today, its value is being redefined by data, AI, and evolving consumer expectations. What once set brands apart through feature-rich devices or competitive pricing is now inseparable from how those products are discovered, purchased, and experienced. The buying journey itself has become part of the product's value—customers increasingly judge innovation not only by what a device can do, but also by the quality of the digital experience that surrounds it.

Modern consumers expect seamless, personalized, and trustworthy engagement, from their first interaction on a mobile app to ongoing support across connected ecosystems. To meet this bar, brands are rethinking how they acquire, serve, and retain customers. Mobile-first engagement and direct brand interactions now dominate acquisition. AI is rewriting the rules of content and search. Customer journeys are emerging as the new organizing principle for marketing structures.

Yet challenges persist. Data fragmentation continues to limit personalization at scale, AI governance lags rapid adoption, and martech ecosystems remain unprepared for advanced orchestration.

The leaders will be those that unify their data, operationalize AI responsibly, and design experiences that anticipate customer needs across every touchpoint.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the High Tech B2C Industry.

This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.
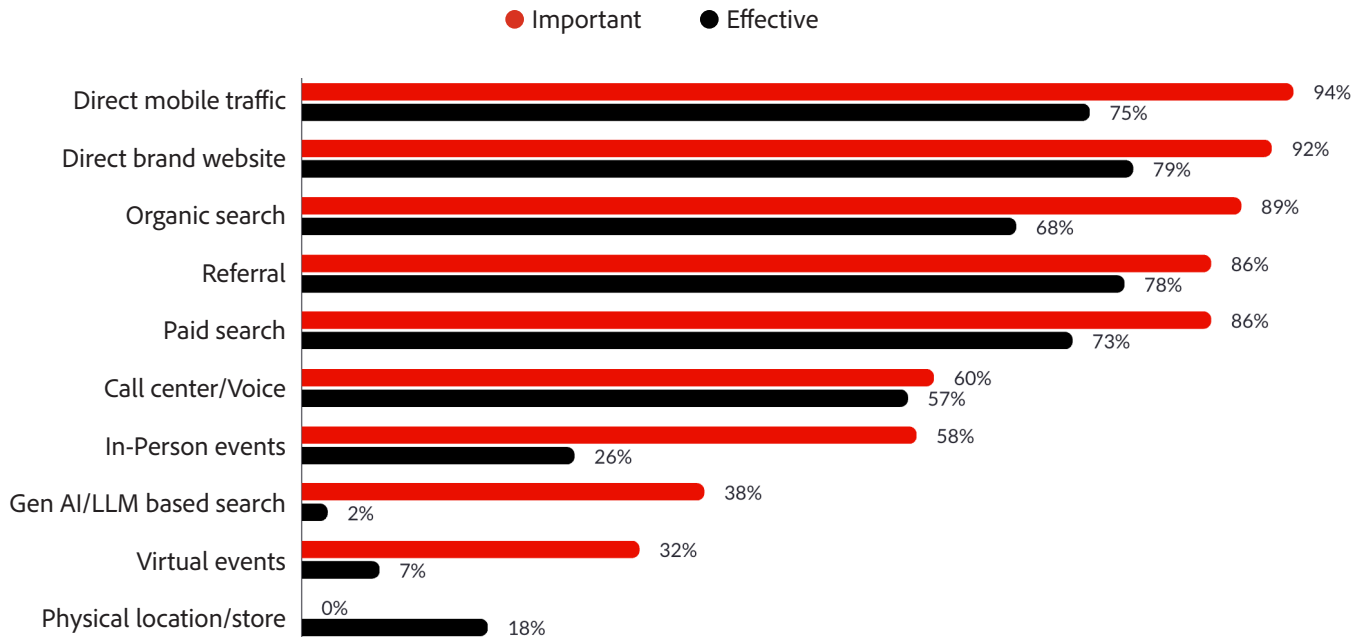
- 244 High Tech B2C leaders participated in the study

- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)

- 67% of respondents were from companies with over $1 billion in annual revenue

- 57% respondents were VP level or above

Mobile-first, direct brand engagement dominates effective acquisition

94% Say direct mobile traffic remains the most important channels for High Tech customer acquisition

● Important   ● Effective

Channel	Important	Effective
Direct mobile traffic	94%	75%
Direct brand website	92%	79%
Organic search	89%	68%
Referral	86%	78%
Paid search	86%	73%
Call center/Voice	60%	57%
In-Person events	58%	26%
Gen AI/LLM based search	38%	2%
Virtual events	32%	7%
Physical location/store	0%	18%

Note: This chart shows the % of respondents rating each channel by its level of importance and the effectiveness of their company in personalizing it

Direct channels lead, while emerging and legacy touchpoints lag

High Tech B2C brands are seeing the strongest performance in digital-first, direct channels such as mobile apps, brand websites, organic search, referrals, and paid search. These touchpoints are where customers expect seamless, personalized engagement and where brands have the most control over data and interactions. In contrast, newer channels like GenAI-powered discovery and virtual events, along with legacy formats such as physical stores, in-person events, and call centers, remain far less personalized.

Personalization maturity is uneven across the ecosystem

The data highlights a widening gap between the channels customers use most and those where personalization is underdeveloped. Direct channels demonstrate how personalization drives engagement and conversion, but brands have yet to extend these capabilities to emerging AI-led or traditional offline touchpoints. This inconsistency risks creating fragmented experiences that weaken trust and limit the ability to influence consumer behavior across the full journey.

Extend personalization to new and legacy channels

Leaders must scale the personalization playbook proven in direct digital touchpoints into both emerging and traditional channels. That means developing AI-enabled strategies for GenAI discovery and virtual engagement while modernizing in-store, call center, and event experiences to connect seamlessly with digital ecosystems. By closing these gaps, High Tech B2C brands can deliver consistent, context-aware interactions across every touchpoint, turning personalization into a durable competitive advantage.
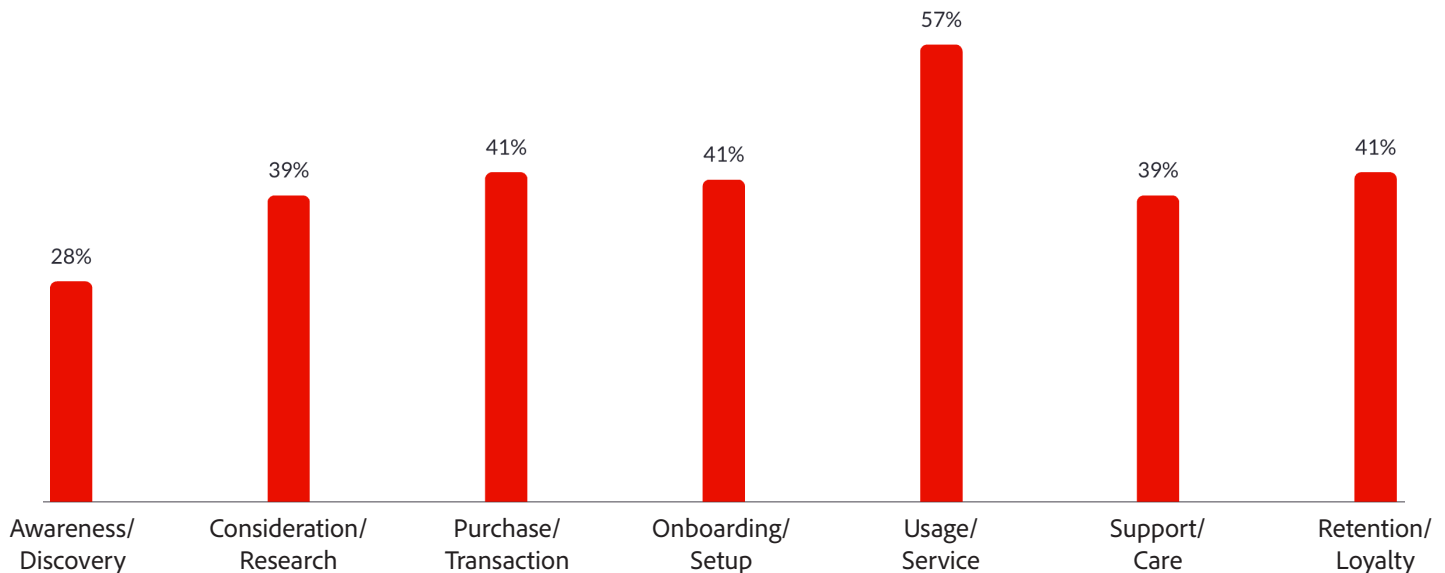
Insight 02

Personalization remains concentrated in specific journey phases

Only
15%
of High Tech companies personalize 75%+ of the entire customer journey

48%
High Tech companies are more likely to personalize during usage and service than at early discovery stages

Awareness/Discovery	Consideration/Research	Purchase/Transaction	Onboarding/Setup	Usage/Service	Support/Care	Retention/Loyalty
28%	39%	41%	41%	57%	39%	41%

Note: This chart shows the % of the customer journey phase that is personalized.

Personalization efforts are uneven across the journey

High Tech companies are excelling at personalizing later stages of the customer lifecycle, particularly during product usage and service interactions. However, early touchpoints like awareness and discovery remain underdeveloped. This imbalance leaves a gap where customers expect relevant and timely experiences from the very start of their journey. Without a connected approach that spans acquisition to retention, brands risk fragmented experiences that fail to capture early interest or build lasting engagement with their target audience.

Data and analytics are underutilized in early stages

Despite having rich data from connected devices, app ecosystems, and user behavior, many High Tech B2C companies struggle to activate this data during awareness or consideration stages. Early interactions often rely on generic campaigns or static content rather than context-driven engagement. This is a missed opportunity to leverage AI and predictive analytics for proactive recommendations, hyper-targeted ads, or tailored onboarding flows. Closing this gap requires greater integration between marketing, data teams, and technology platforms.

Expanding personalization creates competitive advantage

Brands that extend personalization beyond post-purchase phases will differentiate themselves in a crowded marketplace. High Tech leaders are starting to create unified personalization strategies that span all touchpoints, from awareness campaigns to loyalty programs using AI-powered orchestration tools. By enabling dynamic content, predictive targeting, and real-time engagement, these companies deliver seamless, individualized journeys that build stronger connections. Expanding personalization earlier in the funnel not only boosts acquisition rates but also drives lifetime value and long-term customer loyalty.

Marketing's role has shifted to a direct revenue driver

97%
of High Tech marketing leaders say they're being asked to become more efficient

94%
of High Tech marketing leaders say they're expected to directly contribute to revenue

Statement	Percentage
Increasingly asked to become more efficient	97%
Expected to directly contribute to sales/revenue	94%
Measured by direct impact on revenue	94%
Technology investments prioritized on revenue impact	93%
Measured by ability to reduce customer churn	88%
Budget tied to revenue metrics vs brand metrics	86%
Leaders more involved in strategic decisions	84%
Owns more of customer experience	77%
Leaders have strategic influence	74%

Note: This chart shows the % of brands that agree with the statements

Marketing is evolving into a revenue enabler

In High Tech B2C enterprises, marketing is under pressure to move beyond brand amplification toward directly accelerating revenue streams. Product launches, subscription renewals, and device ecosystems demand marketing strategies tied to measurable outcomes. Rather than operating in silos, marketing needs to be more deeply integrated with sales and product teams, ensuring every campaign or lifecycle initiative aligns to revenue growth and market penetration. This shift is becoming critical as organizations adapt to faster innovation cycles and rising customer expectations.

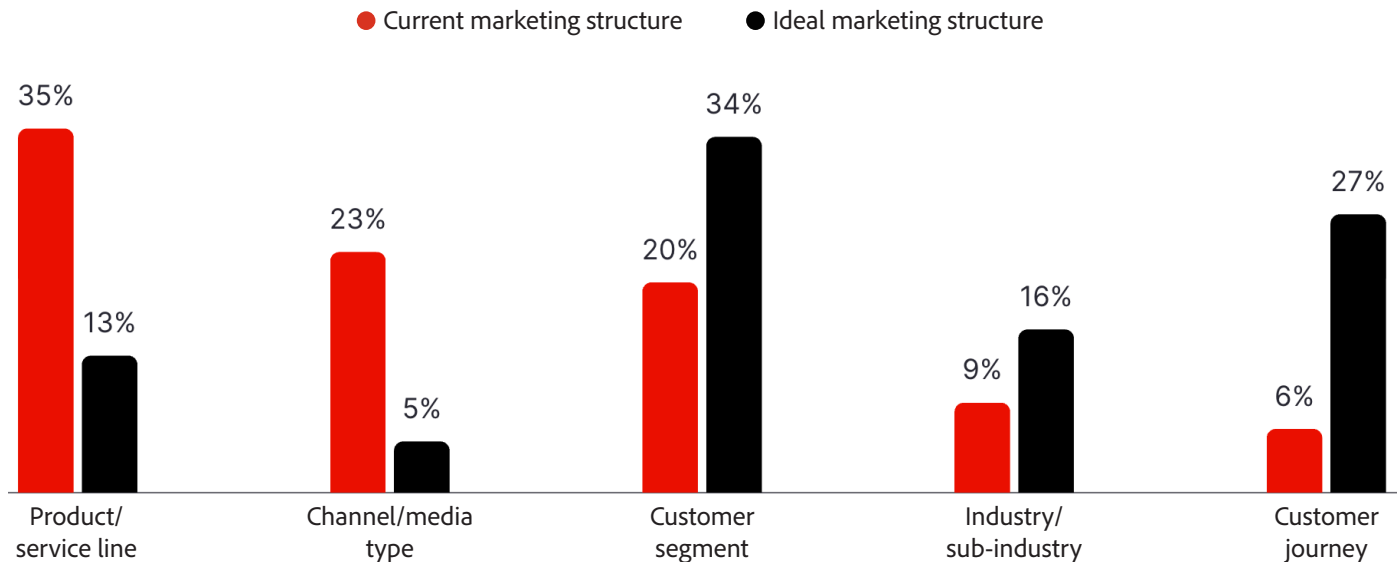## The transformation is driven by performance-first thinking

Marketing leaders are embedding precision analytics, AI-driven attribution, and customer data platforms to prove direct ROI on every initiative. Subscription-based models for devices and digital services require marketing to deliver continuous engagement and maximize customer lifetime value rather than focusing on single campaign conversions. Performance metrics are shifting to include acquisition costs, retention rates, and long-term profitability. As budgets tie to revenue impact, organizations must break silos and unify creative, data, and technology into agile, revenue-focused operating models.

Future-ready teams are building growth engines

Leading High Tech marketers leverage predictive intelligence, omnichannel orchestration, and real-time personalization to turn marketing into a growth engine. Device manufacturers, for example, use AI-powered insights to trigger timely upgrade offers or subscription bundles, converting user behavior into lifetime value. Integrated marketing ecosystems, spanning e-commerce, app ecosystems, and direct-to-consumer channels, enable marketing teams to drive both customer loyalty and incremental revenue. By aligning strategy with innovation cycles, these teams are shaping not just campaigns but the commercial roadmap of the business.

Organizing by the customer journey unlocks greater marketing impact

Only
6%
High Tech B2C orgs are structured around the customer journey

yet,
27%
say this should be the ideal

20%
are organized by customer segment, when 34% say it is ideal

● Current marketing structure   ● Ideal marketing structure

	Product/ service line	Channel/media type	Customer segment	Industry/ sub-industry	Customer journey
Current	35%	23%	20%	9%	6%
Ideal	13%	5%	34%	16%	27%

Note: This chart shows current and ideal marketing organization structure

Modern marketing models must align with the customer journey

High Tech B2C companies increasingly see value in structuring marketing around the full customer journey rather than legacy models based on product lines or media channels. A journey-focused structure emphasizes the lifecycle, awareness, consideration, conversion, onboarding, and loyalty, ensuring teams are accountable for seamless experiences across every touchpoint. By aligning internal teams with these stages, companies can better orchestrate campaigns, personalize engagement strategies, and remove gaps that often occur when teams operate in silos defined by product or channel.

The gap between current and ideal models is significant

Today, most High Tech organizations still organize marketing teams by product line or channel, despite far fewer leaders believing this is the optimal approach. This structural misalignment often results in fragmented campaigns, inconsistent messaging, and missed opportunities for deeper engagement. In contrast, more executives see the ideal in models organized by customer journey or customer segment, which better reflect how buying decisions are made. To meet evolving expectations, companies must shift away from legacy silos and toward lifecycle-driven structures.

Journey-based structures enable agile, connected engagement

By aligning teams with stages such as acquisition, onboarding, and advocacy, High Tech B2C companies can achieve greater agility and accountability. This model allows for insights and actions to flow seamlessly across teams, supporting coordinated efforts that enhance customer experience and drive retention. Leading companies are beginning to integrate lifecycle marketing teams with cross-functional roles spanning analytics, creative, and product management. Structuring around the customer journey not only improves collaboration but also positions marketing as both customer-centric and revenue-focused.

Marketing data integration remains a critical challenge

Only **9%** of High Tech B2C companies have fully integrated and accessible customer data, while the majority operate with only partial data integration.

- Fully integrated and accessible
- Partially integrated
- Siloed but accessible
- Inaccessible/unusable
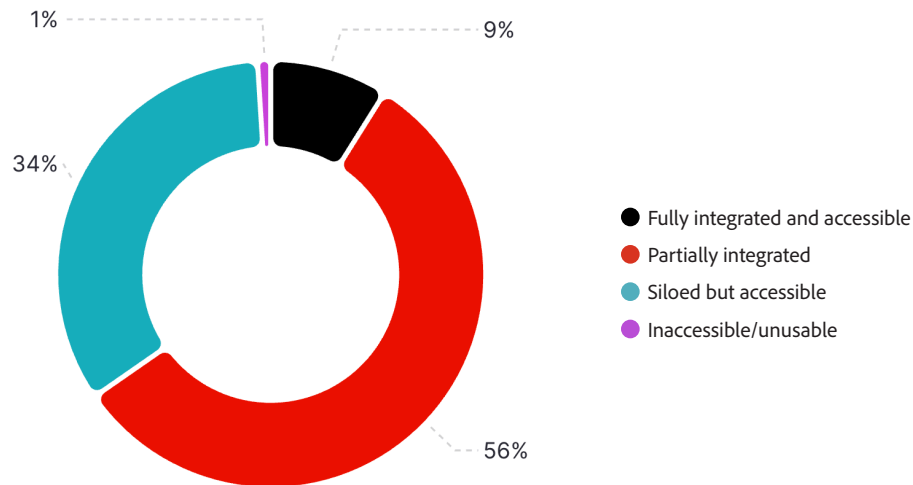
Note: This chart shows the % data that is integrated and accessible

Fragmented data limits customer experience potential

High Tech companies, despite their data-rich environments, struggle to unify information across platforms and systems. Only a fraction of customer data is fully integrated, leaving most datasets partially connected or siloed. This fragmentation disrupts the ability to create a single, actionable view of the customer journey. Without integrated data, personalization efforts remain inconsistent, and marketing teams face delays in delivering timely, relevant experiences. The lack of unified data also reduces visibility across touchpoints, limiting the ability to connect marketing actions to measurable outcomes.

Data gaps hinder AI and advanced analytics initiatives

AI and machine learning depend on complete, high-quality datasets, yet many High Tech B2C companies cannot provide the necessary integration. Disconnected data streams across e-commerce platforms, CRM tools, and product ecosystems reduce the accuracy of predictive models and personalization engines. As a result, advanced use cases like real-time recommendations or dynamic customer segmentation fall short. The absence of a robust data foundation slows innovation, while legacy systems and technical debt make it difficult to modernize quickly and effectively.

Closing the integration gap is now a priority

With data integration ranked as one of the leading marketing transformation challenges, High Tech leaders are investing in modern architectures such as customer data platforms, data fabrics, and hybrid data mesh strategies. These solutions unify fragmented sources into a single ecosystem that powers AI-driven decision-making and engagement at scale. By streamlining pipelines and ensuring accessibility across teams, companies can transform marketing into a responsive, insight-driven function that delivers superior customer experiences and maximizes return on technology investments.
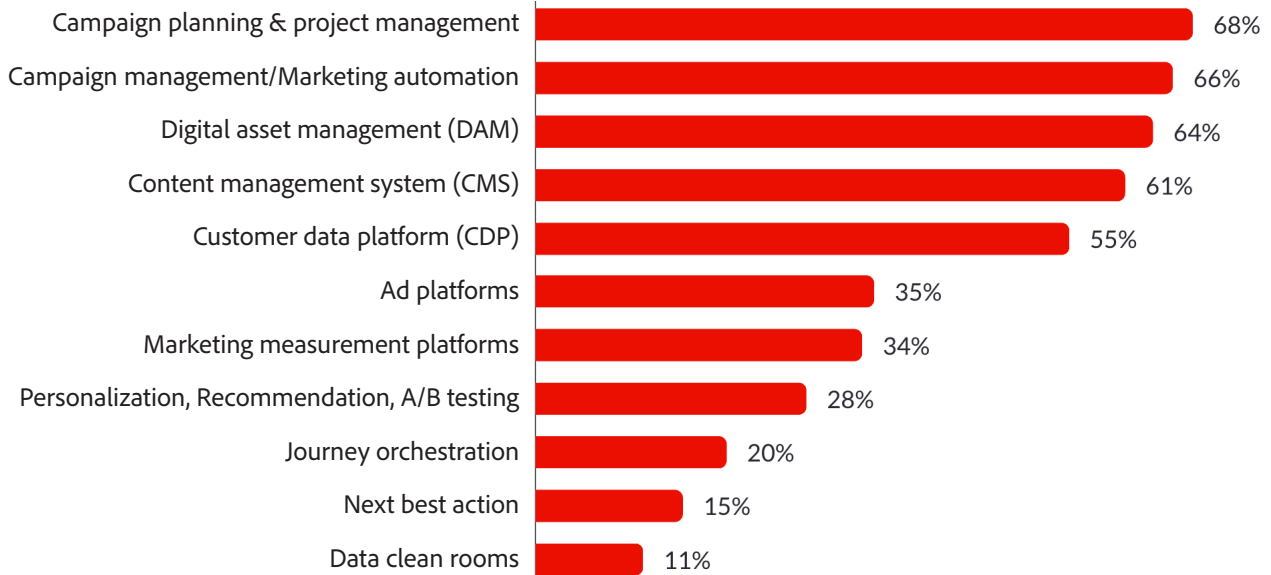
MarTech stack readiness varies significantly by function

68%
say that their marketing stack will be ready for campaign planning in the next 24 months

Only 11%
of brands are ready to activate data clean rooms in the next 24 months

Function	%
Campaign planning & project management	68%
Campaign management/Marketing automation	66%
Digital asset management (DAM)	64%
Content management system (CMS)	61%
Customer data platform (CDP)	55%
Ad platforms	35%
Marketing measurement platforms	34%
Personalization, Recommendation, A/B testing	28%
Journey orchestration	20%
Next best action	15%
Data clean rooms	11%

Note: This chart outlines the % of companies that believe that their martech stack will meet needs over the next 24 months

Foundational tools are in place, but advanced capabilities lag

High Tech companies have well-established tools for foundational marketing activities such as campaign planning and automation, but they lack maturity in advanced experience orchestration. While most executives are confident in their campaign planning systems, few believe their journey orchestration or next-best-action technologies are ready for the future. This uneven readiness is a critical barrier, as advanced tools are required to support connected, real-time, and personalized customer experiences across multiple touchpoints and channels.

Collaboration will be the new competitive advantage

Today's customers expect seamless engagement across devices, apps, and digital ecosystems, but technology gaps hinder this delivery. Capabilities like AI-driven personalization, cross-channel journey mapping, and integrated data clean rooms remain underdeveloped in many organizations. Without these tools, brands struggle to act on real-time behavioral data, resulting in generic or fragmented interactions. This not only erodes customer trust but also diminishes competitive differentiation, especially as digitally native competitors leverage these capabilities for precise, highly personalized engagement.

Closing the gap requires strategic investment

To address this imbalance, leading High Tech companies are prioritizing upgrades to their martech ecosystems with a focus on real-time orchestration and AI-powered decisioning tools. Investments in data clean rooms, next-best-action engines, and advanced journey orchestration platforms are becoming essential. These technologies enable brands to create dynamic, context-aware interactions that respond to individual customer needs in real time. Companies that modernize their technology stacks will be better equipped to deliver the seamless, personalized experiences that customers expect and competitors already provide.
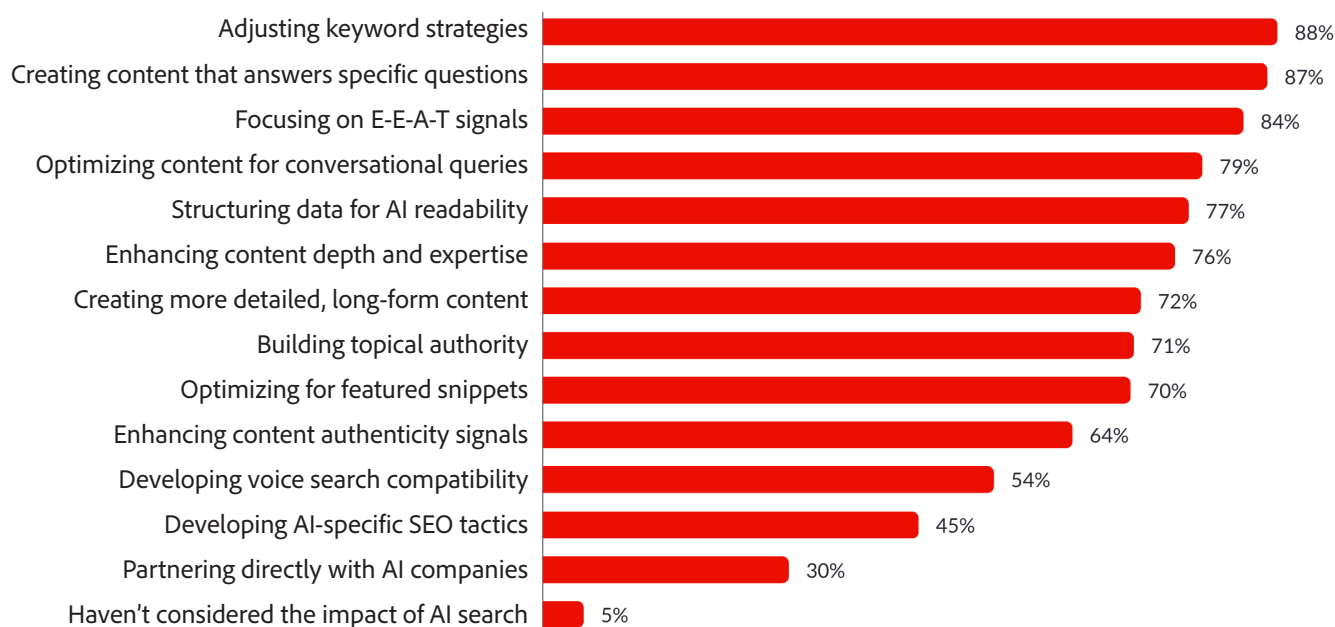
AI Search is poised to disrupt organic search strategies

25%
of organic search volume is expected to shift to AI-powered platforms within the next 24 months

88%
of High Tech B2C companies are already adjusting keywords strategies

Adjusting keyword strategies	88%
Creating content that answers specific questions	87%
Focusing on E-E-A-T signals	84%
Optimizing content for conversational queries	79%
Structuring data for AI readability	77%
Enhancing content depth and expertise	76%
Creating more detailed, long-form content	72%
Building topical authority	71%
Optimizing for featured snippets	70%
Enhancing content authenticity signals	64%
Developing voice search compatibility	54%
Developing AI-specific SEO tactics	45%
Partnering directly with AI companies	30%
Haven't considered the impact of AI search	5%

Note: This chart shows the % brands adjusting their search strategy for AI-powered discovery

AI search is reshaping digital discovery

The shift toward AI-powered search engines is transforming how customers discover High Tech B2C brands and products. Traditional keyword-based SEO is no longer sufficient as conversational AI platforms and large language models redefine relevance and ranking. High Tech companies must now create content that directly addresses user intent, delivering answers rather than simply optimizing for clicks. This shift demands a new understanding of how AI interprets, summarizes, and curates content, influencing both visibility and customer decision-making.

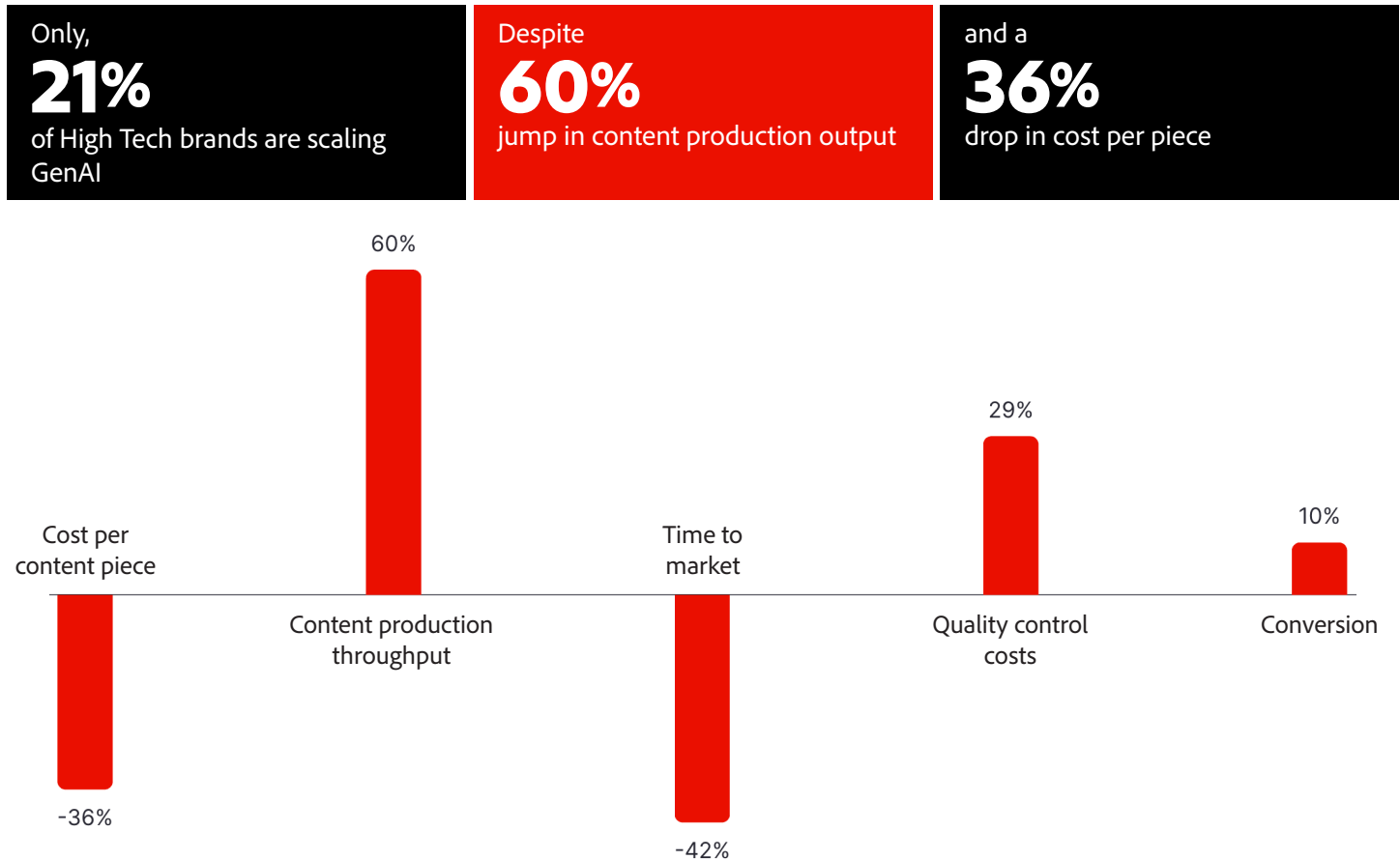### Content strategies are evolving to meet AI needs

With 25% of traditional search traffic expected to migrate to AI-powered platforms, High Tech companies are prioritizing structured, high-value content that stands out in AI-driven summaries. Strategies are moving from keyword density to building expertise, authoritativeness, and trustworthiness. Executives are focusing on conversational content, detailed answers, and machine-readable data formats. This includes rethinking metadata, enhancing contextual depth, and leveraging AI-driven insights to ensure that content resonates not only with users but also with AI systems.

Build readiness for Generative Engine Optimization (GEO) and AI-driven discovery

To stay visible in AI-powered search, High Tech firms must go beyond traditional SEO and embrace GEO. This requires restructuring content for AI visibility, designing for conversational and intent-based queries, and ensuring data is machine-readable. Leading organizations are also beginning to test partnerships with AI platforms to secure early advantage. By embedding GEO into their digital strategies now, brands can safeguard visibility, strengthen engagement, and capture growth as generative AI redefines discovery.

Generative AI is revolutionizing content economics

| Only, **21%** of High Tech brands are scaling GenAI | Despite **60%** jump in content production output | and a **36%** drop in cost per piece |

Cost per content piece — -36%

Content production throughput — 60%

Time to market — -42%

Quality control costs — 29%

Conversion — 10%

Note: This chart reflects how Generative AI has influenced content production efficiency and costs

AI is reshaping content scale and efficiency

High Tech B2C companies are realizing transformative benefits from generative AI, which is redefining the speed, cost, and scale of content creation. AI enables teams to produce personalized and localized content faster, supporting frequent product updates, device launches, and software releases. By automating repetitive content tasks such as copy drafting, image generation, or product descriptions, marketing and product teams can redirect resources toward strategic and creative efforts. This shift is fueling higher throughput and faster time-to-market across B2C ecosystems.

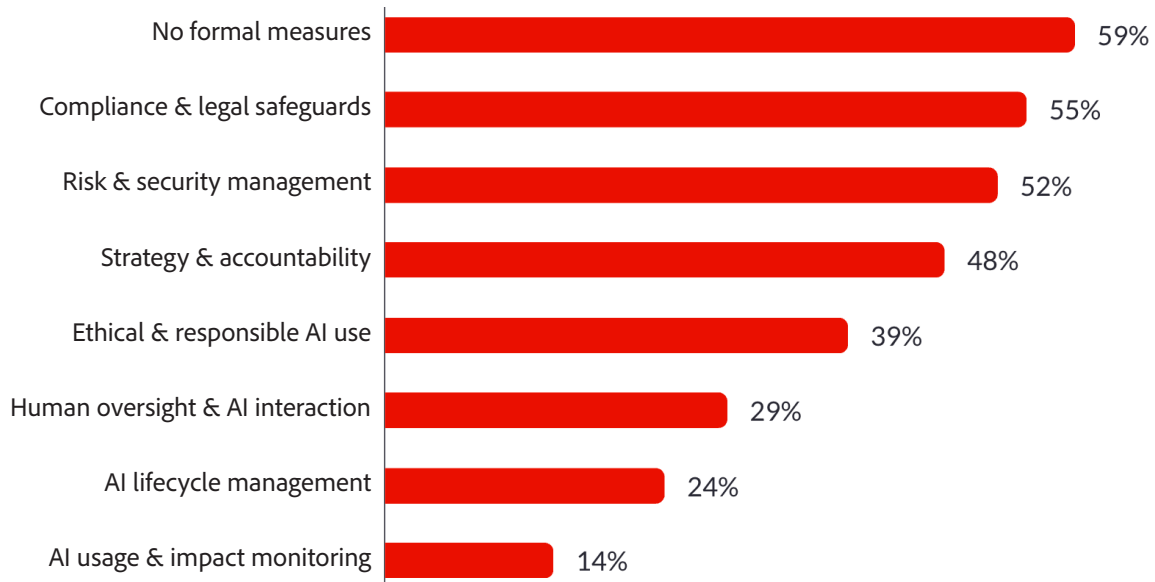## The rise of AI brings quality and governance challenges

While generative AI drives impressive efficiency gains, it also introduces risks around accuracy, technical precision, and brand voice. High Tech products often involve complex specifications, requiring stringent quality checks. Quality control costs have risen as teams manually review AI-generated outputs to ensure compliance and reliability. To offset this, companies are increasingly training AI models to apply brand rules and technical standards upfront, ensuring early-stage content validation and reducing the manual effort needed during the final review process.

AI can streamline review processes

An emerging approach is to integrate AI as a proactive quality filter, automatically verifying accuracy, tone, and brand alignment before human intervention. By training AI on detailed content guidelines, High Tech firms can automate tasks like consistency checks and factual verification, catching errors early. This hybrid model not only reduces quality control costs but also accelerates content readiness. Human reviewers, freed from repetitive validation tasks, can focus on refining strategy and creativity, making the overall content pipeline faster and more resilient.

AI governance lags behind AI implementation

While
78%
of organizations are either learning. exploring or doing proof of concept for AI adoption

only
39%
have have ethical AI guidelines measures in place

and just
14%
have AI usage monitoring.

Category	Percentage
No formal measures	59%
Compliance & legal safeguards	55%
Risk & security management	52%
Strategy & accountability	48%
Ethical & responsible AI use	39%
Human oversight & AI interaction	29%
AI lifecycle management	24%
AI usage & impact monitoring	14%

Note: This chart shows the % of organizations that have AI governance measures in place

Rapid adoption is outpacing responsible oversight

High Tech B2C companies are aggressively expanding AI and automation, but governance frameworks have not kept pace. While most organizations prioritize AI for efficiency and innovation, fewer than half have established accountability measures or ethical guidelines. This creates vulnerabilities in areas such as compliance, content integrity, and customer trust. Without clear governance, companies risk deploying AI solutions that fail to meet legal, ethical, or brand standards, potentially leading to operational missteps, regulatory challenges, or reputational damage.

Ethical AI remains an emerging priority

The High Tech sector faces unique scrutiny as customers and regulators demand transparency in how AI systems are trained, deployed, and monitored. Yet only a minority of companies have ethical frameworks or AI usage monitoring in place. This lack of oversight increases risks related to bias, data privacy, and algorithmic decision-making. As generative AI becomes integral to customer interactions, companies must adopt formal governance strategies that balance speed of innovation with responsible use and long-term credibility.

Building governance must become foundational

Forward-looking High Tech companies are investing in AI councils, compliance protocols, and lifecycle monitoring to address these gaps. These governance structures ensure AI initiatives are aligned with corporate values, regulatory requirements, and customer expectations. By embedding oversight mechanisms from model training to deployment, companies can mitigate risks and build trust. Establishing governance as a core pillar of AI strategy is no longer optional—it is critical to scaling AI responsibly while maintaining brand integrity and competitive advantage.
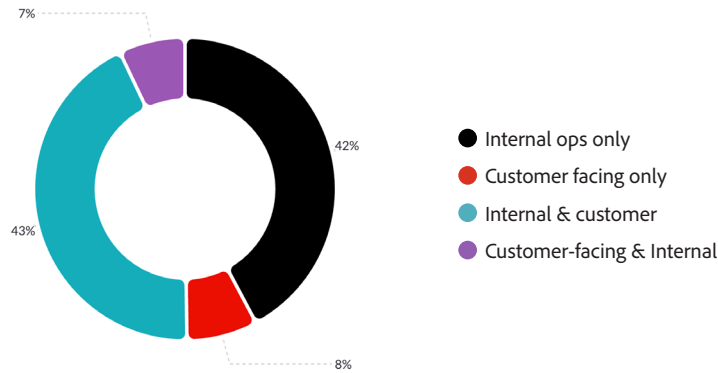
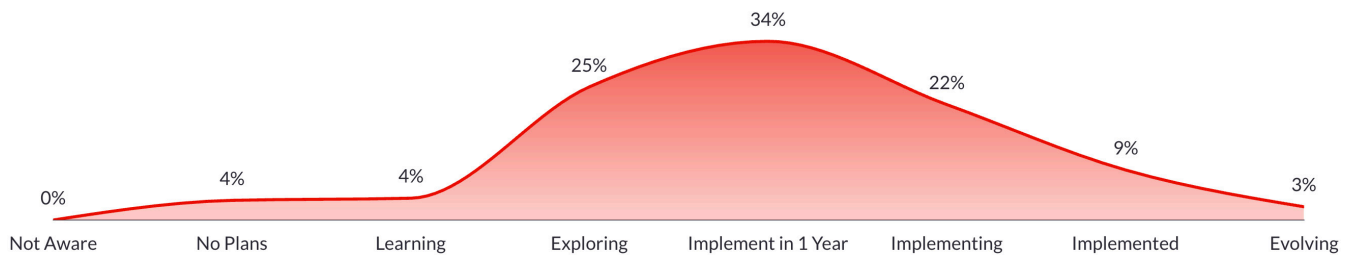# Agentic AI adoption shows high awareness but limited implementation

43%
of High Tech B2C companies are applying agentic AI to internal and customer facing operations

51%
are actively exploring, learning, or implementing these capabilities

- Internal ops only
- Customer facing only
- Internal & customer
- Customer-facing & Internal

42%
43%
7%
8%

Note: This chart highlights key areas where organizations are prioritizing the implementation of Agentic AI

Not Aware	No Plans	Learning	Exploring	Implement in 1 Year	Implementing	Implemented	Evolving
0%	4%	4%	25%	34%	22%	9%	3%

Note: This chart shows the % of an organization's awareness and plans for Agentic AI and adoption

Awareness is high, but adoption remains cautious

High Tech companies are actively exploring agentic AI, yet deployment rates remain low. While over 1/3 are experimenting with pilots or use cases, fewer than 12% have fully implemented or evolved their approaches. Most organizations recognize agentic AI's potential to revolutionize both internal operations and customer interactions, but concerns around governance, security, and scalability have slowed progress. This staged adoption reflects a deliberate approach, prioritizing foundational readiness before expanding to enterprise-wide implementations or customer-facing applications.

Operational efficiency is the first area of focus

Nearly half of High Tech companies adopting agentic AI are beginning with internal operations such as automated workflows, intelligent process management, and back-office optimization. By starting internally, organizations can validate AI capabilities in controlled environments, streamline repetitive tasks, and reduce operational overhead. These early initiatives build confidence and establish clear ROI benchmarks. Only after proving operational value are companies preparing to extend agentic AI to customer experiences, where trust, brand consistency, and real-time responsiveness are critical.

A staged approach ensures long-term success

Leading High Tech companies are building structured roadmaps for agentic AI adoption, combining internal pilots with strong governance frameworks. They are investing in AI training, cross-functional alignment, and ethical guidelines to manage risks while preparing for broader customer-facing applications. The next wave of adoption will involve AI agents delivering personalized support, guiding onboarding journeys, and managing multi-channel customer interactions in real time. By mastering operational use cases first, companies can expand agentic AI with confidence and measurable impact.

Conclusion

The research reveals that High Tech B2C companies are strong innovators but uneven executors. While they excel in foundational marketing capabilities and are quick to adopt AI, they face persistent gaps in data integration, journey-based personalization, and advanced martech enablement.

The future of High Tech marketing will depend on four critical priorities:

- Embedding AI across content and customer experience strategies while maintaining rigorous governance.

- Unifying customer data pipelines to enable consistent personalization and advanced analytics.

- Reorienting marketing structures around the customer journey rather than channels or products.

- Closing martech readiness gaps by investing in orchestration, decisioning, and next-best-action platforms.

Strategic priorities for High Tech B2C leaders

To thrive in an AI-driven, customer-first world, High Tech leaders must act on the following imperatives:

1. **Close the Personalization Gap:** Extend personalization beyond post-purchase touchpoints to awareness and discovery phases using predictive insights and AI-driven orchestration.

2. **Rewire for Journey-Based Marketing:** Organize marketing teams around lifecycle stages (acquisition, onboarding, loyalty) to deliver seamless, end-to-end experiences.

3. **Build Responsible AI Frameworks:** Establish ethical AI governance and monitoring systems to ensure trust, compliance, and brand safety as AI adoption scales.

4. **Invest in Martech Modernization:** Prioritize journey orchestration tools, next-best-action engines, and data clean rooms to enable real-time, customer-centric decision-making.

5. **Unify Data Ecosystems:** Break down silos with modern data architectures (e.g., data fabrics or hybrid data mesh) to enable holistic customer views and actionable insights.

6. **Leverage Direct Mobile Channels:** Double down on mobile-first and direct brand engagement strategies to capture customer attention in a crowded acquisition landscape.

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