



Adobe



THE LONDON SCHOOL  
OF ECONOMICS AND  
POLITICAL SCIENCE

# New Era In Experience Report




Artwork by Caroline Kjellberg



## Table of Contents

Welcome to the New Era In Experience	3
Academic Lead	5
What does the New Era look like?	6
The economic impact of the COVID-19 pandemic	7
Survivors, Hiders, and Thrivers	9
Four key traits of Thrivers	12
Blockers to digital transformation	15
Four examples of Thriver brands	16
Facing the New Era head on	21
Report methodology	21





# Welcome to the New Era In Experience

## Introduction



**Paul Robson**

**President, International  
at Adobe**

It's now become an overused but understated cliché to say we're living in 'unprecedented times' – but we've all experienced the widespread impact of the COVID-19 pandemic on the health of our economies and societies.

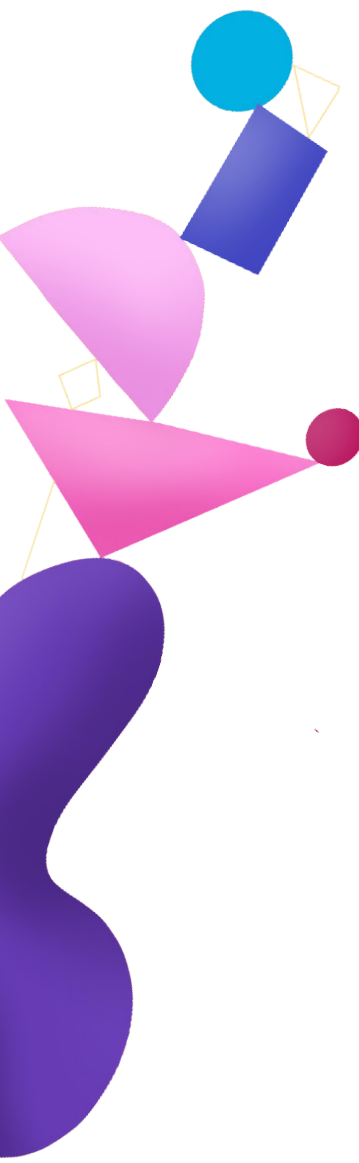
Yes, the challenges have been numerous and far-reaching, but it's the resilience, empathy, and willingness to adapt that have truly shone through. Almost everyone, at some point over the past 12 months, has gone that extra mile, shouldered extra responsibility, or helped a colleague or local community in need – and this should be commended before anything else.

From a business perspective, the pandemic has brought about changes so sweeping that we cannot even comprehend the full magnitude of them – still, we recognise that just about everything has changed. And we, as brands and business leaders have changed too – from the way we work, to the way we connect with customers and colleagues, and the way we create and deliver experiences in this new, digital-first era.

Together with London School of Economics (LSE) – one of the world's most prestigious business schools – we set out to not only define this New Era In Experience, but to also explore how brands can succeed in it, especially when such significant change has occurred in such a dramatic fashion.

Ultimately, it's our ability to react to these changes that will define us. Just look at the wholesale shift towards remote working. For leading brands, the ability to collaborate across borders and time zones has enabled them to not only keep the wheels turning, but also to pursue innovative and creative ways to expand and broaden the customer experience.

Throughout the report, you'll hear from progressive leaders at some of the world's biggest brands, as they reveal their approach to dealing with the wealth of challenges and opportunities exposed by the COVID-19 pandemic. Through this, we discovered that, during 2020, brands largely fell into three distinct categories: Survivors, Hiders, and Thrivers.



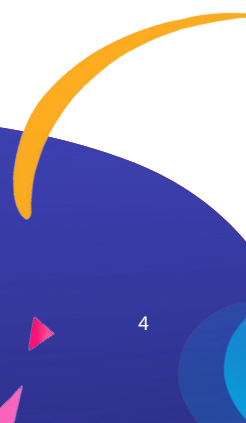
The research also revealed that Thriver brands share four common characteristics – traits and skills that business leaders must now encompass across their entire business in order to adapt to the requirements of a digital-first era:

- **Hands-on and open to change:** The New Era requires a type of leadership, one that is visible and accountable, embraces change, invests in innovation, and adapts quickly and is willing to learn from mistakes.
- **Build organisational culture around trust:** The New Era has transformed the employer and employee relationship to a culture now built on trust, empowerment, and autonomy.
- **Adopt rapid decision-making:** The New Era is fast-paced and unpredictable – every part of the business must work together, in real-time, to meet customer needs, and be ready to adapt to whatever change may come next.
- **Enable continual learning/upskilling:** The New Era is constantly evolving, and requires that those who succeed must constantly evolve too – businesses must continually look at new ways to enable their people to best meet their customers' needs.

The ability to deliver great customer experiences online is no longer just a nice-to-have – it is a competitive requirement in the New Era. Brands face the need to get closer to their customers, the channels they use and, most significantly, the experiences they expect.

Importantly, in the New Era, customers don't rank their experiences against industry and sector, they rank it against the best experience they've ever received – and this is the new bar that brands must aspire towards. It means leaders have a critical role to play in not only inspiring their people to engage customers in new and exciting ways, but also in defining this new standard in customer experience management, one that all future standards will be held against.

Above all else, one unifying message is clear – there is no going back. The changes wrought during the pandemic mean the relationship between employer, employee, and customer will never be the same again – and leaders must willingly embrace and adopt these traits, right now, in order to thrive during the New Era In Experience.



# Academic Lead



**Dr Alexander  
Grous**

**Lecturer & Researcher -  
Department of Media &  
Communications, LSE**

Dr Grous has been researching digital, cloud and disruptive and emerging technologies since 2007 alongside management practices and the impact on firm performance that best practice technology management can deliver. Since February 2020, he has also been researching the impact of the COVID-19 pandemic on digital engagement changes by retailers, banks and financial institutions internationally. He continues to research digital tools and their use by organisations to monetise consumers, cloud and technology across organisation types, size and sectors internationally, quantifying the impact on firm performance across the firm's areas. He also researches cohort digital, social and economic behaviour, providing an ideal position from which to consolidate both a digital-business and consumer perspective. Dr Grous brings extensive international digital and technology commercial experience to the LSE before he joined, including as Managing Director for Lockheed Martin's Infocom Division in EMEA, CEE/CIS and from CEO and COO roles in US\$250-500m technology companies engaged in digital, e-commerce, P2P and B2B activities. He has also worked in FMCG companies such as PepsiCo in strategic and marketing roles and was also part of the team that launched iPlayer, Freesat and YouView at the BBC.

Dr Alexander Grous has been at the LSE since 2007 and is attached to the Department of Media and Communications ('DMC'), where he teaches at a postgraduate level including on the MSc in Digital Media and Communications and LSE Management and Executive Programmes in the UK, EU and other countries. Key areas taught include digital, management practices, innovation, socio-economic analysis and others.



THE LONDON SCHOOL  
OF ECONOMICS AND  
POLITICAL SCIENCE ■

*This report is commissioned via LSE Consulting which was set up by The London School of Economics and Political Science to enable and facilitate the application of its academic expertise and intellectual resources.*

(T) +44 (0)20 7106 1198 (E) [consulting@lse.ac.uk](mailto:consulting@lse.ac.uk) (W) [lse.ac.uk/consultancy](https://lse.ac.uk/consultancy)



# What does the New Era look like?

There's no doubting the New Era in which we find ourselves – the New Era we must embrace – is predominately a digital one. It's an era defined by speed, agility, and personalisation, an era dictated by ever-shifting customer behaviour and expectations.

While many brands were already on the steady road to digital transformation, COVID-19 accelerated that journey into overdrive. We saw widespread adoption of new technologies, more agile ways of working, greater focus on customer-centricity, and an increasing blend of work and life. It's almost impossible to consider that the pandemic hasn't affected everyone in some shape or form.

Additionally, the financial repercussions have been felt far and wide. The research shows almost three-quarters (**72%**) of all European brands experienced a drop in revenue, while **44%** reported a struggle to fund technology, and a third (**33%**) postponed technology acquisition during 2020.

Some changes occurred so rapidly that it felt like they took place overnight. But, in fact, digital transformation and its attendant cultural shifts were afoot long before the pandemic, and while latent, COVID-19 threw them into sharp context.

True, the pandemic forced us into home office environments – but it expanded attitudes towards

remote ways of working, autonomy, and flexible schedules, which all quickly became the status quo. Some **40%** of European employees now work remotely, with 86% of those doing so because of the pandemic.

Remote working can be a rollercoaster, with all its thrills and spills. For many, it was first received as curious and different, akin to a 'snow day', but that soon gave way to feelings of isolation. People wanted more connection, managers sought more visibility, and some employees became restless as the day-in, day-out nature of the pandemic took hold. That's where progressive leadership stepped in, communicating more often and redefining company culture to revolve around empathy and empowerment, while also refining process and best practice.

By adapting and evolving to the new requirements of both the employee and customer, brands have the potential to evolve and thrive in this transformed world. The question remains though, how do we operate in this New Era? Together with Adobe, we set out to identify the key digital transformation requirements in larger enterprises and SMEs, predominately in the UK, France and Germany.

We embarked on this research project in 2009, long before the pandemic began – but 2020 serves as culmination and tipping point for what we set out to achieve, a better understanding of technology-driven change, digital transformation, and the role leadership can play in enabling change at scale. This report highlights the key findings with a sharp focus on COVID-19's impact.

## 40%

of European employees now work remotely

## 86%

of those doing so because of the pandemic





# The economic impact of the COVID-19 pandemic

The cross-sector financial impact of COVID-19 has been dramatic. Indeed, according to IMF research, in Europe alone, real GDP dropped by around **40%** in the second quarter of 2020, on an annualised quarter-over-quarter basis. The GDP shrink was felt most keenly in 'advanced' Europe – where the virus reached first – compared to emerging Europe.

For 2020 as a whole, Europe's GDP is forecast to contract by **7%** overall, but is expected to grow by **4.7%** in 2021, according to the IMF report.

## UK

The UK displayed the greatest impact to its GDP, with a 25% GDP drop during April 2020, compared to February 2020. This improved by November 2020, with a reduction of only **8.5%** in GDP versus February 2020, although November recorded a GDP drop of 2.6% compared to October 2020, due largely to the re-introduction of lockdown restrictions.

The UK's Office for National Statistics (ONS) reported that UK GDP shrank by a record 9.9% during 2020, with IMF predicting GDP growth will rebound 2021, but almost halve in 2022.

## Germany

Germany's Federal Statistical Office Destatis noted a record plunge in GDP, dropping by 10.1% in the second quarter of 2020 compared to the previous quarter, and by 11.7% for the first quarter compared to the same quarter in 2019.

IMF predicts that, on an annual basis, Germany's GDP is forecast to contract **6%** in 2020.

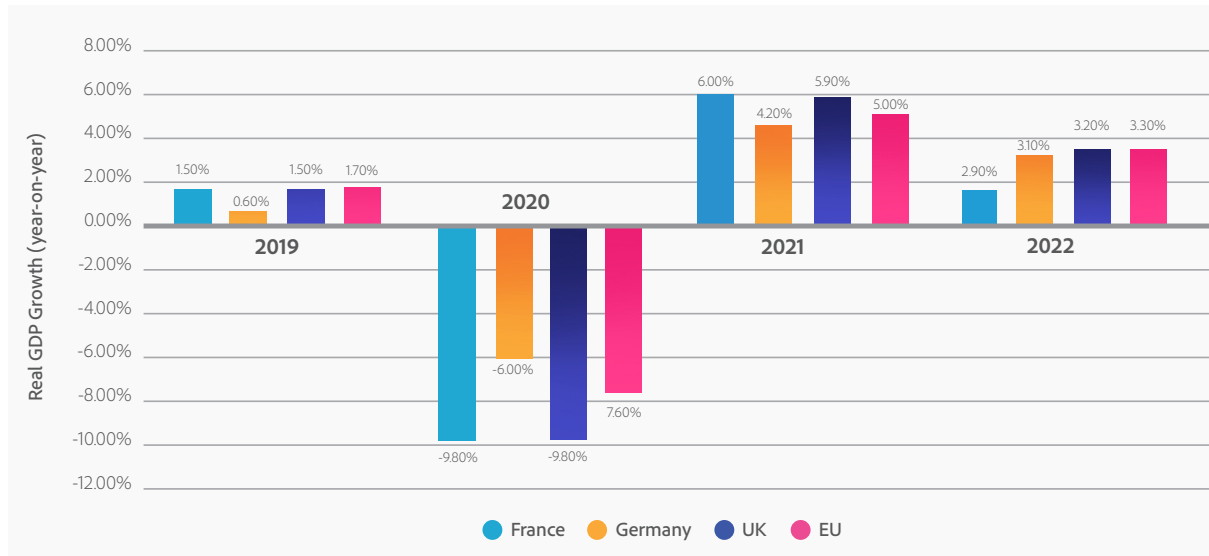
*<sup>1</sup> SMEs defined as organisations with revenue up to EUR 50 million and less than 250 employees.  
Large enterprises defined as those with revenue exceeding EUR 50 million and with over 250 employees.*

## France

France recorded a 13.9% and 5.9% reduction in GDP for the first and second quarters of 2020 when compared to the previous quarters.

Like the UK, IMF predicts that France's GDP is forecast to contract **9.8%**, with GDP growth predicted to rebound in 2021, but almost halve in 2022.

The chart below depicts GDP growth in 2019 and forecast growth between 2020-2022.



Of all the bands surveyed during our own research, almost three-quarters (**72%**) experienced a drop in revenue, while **44%** reported a struggle to fund technology, and a third (**33%**) postponed technology acquisition during 2020.

Any future growth will be due, in large part, to our ability to adjust to a 'new normal', adapting to remote working, an increase in digital engagement tools, and easing restrictions on transport and socialising. This willingness to change, to be brave and take risks, helps us begin to separate brands into three broad categories.

# 72%

experienced a  
drop in revenue

# 44%

reported a struggle  
to fund technology

# 33%

postponed technology  
acquisition during 2020





# Survivors, Hiders, and Thrivers

As much as the pandemic exposed vulnerabilities around technological shortcomings and a lack of agility, it crucially uncovered behaviours and opportunities to succeed during the crisis and beyond. What's more, these learnings can easily be applied to almost all sectors, because a data-driven, scalable approach to the customer and employee experience should be viewed as a common goal for every brand, regardless of industry.

Through analysis of brand behaviour – a research journey that started in 2009 and culminated during the pandemic – three main groups have emerged that remain incredibly relevant during the New Era In Experience: those who either Survive, Hide, or Thrive.

Critically, the pandemic-focused findings support much of the early research, highlighting the transformative role that digitalisation and good leadership can play in Survivors, Hiders, and Thrivers.

## Survivors - 35%

Survivors get by on the bare minimum. Accounting for 35% of brands surveyed, they make the most dramatic and 'reactionary' spending cuts across their enterprises. Decision-makers at these brands can be the most cautious and are also the most disconnected from day-to-day business activities and customers.

## Hiders - 40%

Some 40% of brands are Hiders. They selectively refine investment in areas believed to offer the greatest benefits. These brands reduced technology spend during the pandemic, with managers pinpointing a lack of IT skills as the main barrier to addressing the impact of COVID-19. Hiders also reduced spend on technology and innovation, but maintained enough investment to sustain a competitive position.

## Thrivers - 25%

A quarter of brands are Thrivers. These organisations addressed the external shock of COVID-19 by equipping themselves through enhanced digital transformation, automation, cost-reduction, innovation, and investment.

They adjusted business processes, redefined organisational structure, and optimised resources. What's more, when they did so, they realised some pretty impressive outcomes – be that sales growth, increased productivity, faster product releases, or employee/customer satisfaction.

Thrivers also astutely re-channelled cost savings into technology innovation to create an informed and connected workforce, and ultimately, happy and engaged customers.

Attribute	Survivors	Hiders	Thrivers
Revenue impact from COVID-19 pandemic	Survivors suffered the largest revenue drop, with almost <b>70%</b> noting a revenue drop, at an average reduction of around <b>50%</b>	Around <b>66%</b> of Hiders reported a fall in revenue due to COVID-19, with an average revenue drop of around <b>35%</b>	Although Thriver brands felt the financial impact of the pandemic – <b>66%</b> reported at least some revenue shortfall, with an average drop of <b>15%</b> – their strong digital presence will allow them to react, adapt, and flourish in the long term
Brand response	Survivors cut almost all 'non-essential' spending, reduced staff, sought additional funds, and displayed little to no strategic planning	Hiders took a shorter-term view with some long-term outlook, reducing spending selectively to balance survival with longevity	Thrivers perfected the balance between long- and short-term remedies, with little to no reduction in spending, while focusing on market adaptation for continued growth
Time-Horizon	Immediate	Immediate-short term	Immediate-long term
Company culture	Survivors are more cautious, often less engaged with the business, and rely on constrictive hierarchical reporting lines	Hiders are open and receptive, engaging with the business and willing to adopt some change	Thrivers possess open and engaging leadership that promotes sharing, collaboration, and innovation
Leadership and management approach	Survivors focus on profitability and short-term results to maintain status quo. They apply a mix of some productivity enhancements, controlled decision-making, and lower innovation ethos	Hiders employ a mix of near-term profitability and long-term efficiencies. They're focused on people and technology openness	Thrivers balance short and long-term view for profitability and innovation. They possess well-articulated strategies that link technology and people, with clear goals
Technology strategy	Survivors dramatically reduce/freeze tech spending, while also deferring innovation projects	Hiders mainly prioritise spend to aid operating cost reduction, reducing some costs	Thrivers maintain or increase tech investment, focusing on operating cost reduction, while maintaining their competitive position
Digital appetite	Although Survivors possess digital appetite – which can include some innovative options including the cloud – any investment is typically frozen during times of crisis	Hiders possess a medium-high digital appetite. They prioritise digital transformation, but with lower spend to reduce operating costs and spur some innovation	Thrivers have a high digital appetite. They invest in digital transformation to reduce operating costs, enhance efficiency, and elevate competitive position
Digital blockers	Survivors are constrained by leadership resistance, citing costs, time-to-implement, skills required, management attention, and technology security as the main barriers	Hiders experience similar hurdles to Survivors, but not as restrictive, including; technology security, costs, skills-overhead, and lower awareness of tech availability	Among Thrivers, blockers still exist including; legacy solutions, complex infrastructure, technology security, and knowledge on available tech options
Post-pandemic opportunities	Survivors have a higher chance of failure. Where survival occurs, brands are running at 'bare bones' capability and are unable to be competitive in the long-term	Hiders emerge in a 'status quo' position, or marginally stronger in some cases. They're able to selectively target innovation and other activities to increase opportunity to be competitive	Thrivers survived and grew during the pandemic. They emerged as industry leaders, spurred by innovative activities, often adopting new technology and practices



# A regional snapshot

While the proportion of **Survivors, Hiders, and Thrivers** are relatively similar across most major European countries including the UK, France and Germany, the research revealed a number of interesting country-level observations:

## Shifting IT budgets

One-third (**33%**) of French enterprises reduced their IT budgets, compared to 20% in the UK and just **16%** in Germany.

## Innovation investment

German enterprises allocated the highest budgets to innovation (**24%**) and undertook the greatest degree of automation, ahead of the UK, and followed by the French enterprises.

The UK displayed the strongest 'innovation resilience', outperforming the EU average by **21%**, followed by Germany at **20%** and France at **4%**.

French companies were the most cautious, with innovation spend decreasing by **17%** on average. French enterprises also reflected the highest degree of streamlining in their operations, in order to offset innovation spending reductions.

## Remote working capabilities

Over 38% of German, 39% of French, and 43% of UK employees hold positions where work can be undertaken through remote and flexible arrangements.





# Four key traits of Thrivers

Everyone hopes to thrive, not just in times of crisis, where it's acutely relevant, but also during quieter periods, when leadership has the luxury to look around corners and **future-proof their business**. Our research interrogated the shared behaviours of the most successful Thrivers – uncovering four overarching commonalities that **leaders must embrace** if they're to succeed during the New Era In Experience:

## 1. Hands-on and open to change

While digital infrastructure needs to be in place to meet hard metrics, soft skills are in increased demand: emotional intelligence to trust others and collaborate effectively; empathy and resilience to operate in uncertainty; and the ability to accept failure, learn from it, and quickly recover.

The research shows the most successful enterprises boast deeply engaged management teams who embrace change in the business process. These progressive leaders transform individual work activities, replace face to face interaction with collaborative online workplaces, and communicate prolifically via new digital channels.

During the pandemic, Thriver brands enjoyed a **20% productivity uplift** in employee output, citing increased employee well-being and the ability to work on-demand remotely as the key driver.

- **Engaged executive leadership:** A highly visible C-Suite and senior management team during the pandemic planned for its impact both short- and long-term, with enterprise-wide engagement and accessibility.
- **Supplier engagement:** Thrivers recognise that engaging with suppliers is as critical as engaging with customers and employees. They integrate services with suppliers, meaning they're able to deal with supply shortages, and locate alternative sourcing and stock control, should they require.

## 2. Build organisational culture around trust

Digital transformation starts at home. During the pandemic, Thrivers quickly realised the key to driving significant change within their business relied on their ability to equip, enable, and empower their employees. Across Europe, 40% of employees are now working remotely, and of these, 86% are doing so as a direct result of COVID-19. The pandemic has certainly signalled an attitudinal shift towards remote and flexible working, and many brands and employees are unlikely to return to a strict five-day office schedule once societal restrictions are relaxed. Indeed, **80% of CEOs who introduced work practices to support digitalisation say they're likely to retain them after the pandemic.**

- **Employee well-being:** Thrivers use digital tools to communicate and support employee mental and physical health, including offering well-being services, links to specialist resources or professionals, and amending practices to adjust to remote working.
- **Collaborative tools:** The use of video and chat solutions to engage collaboratively, not just for employee wellbeing, but for rapid product development and enhanced supplier and customer engagement.
- **Localisation autonomy:** Centralised campaigns can be used across multiple websites and regions via solutions that allow regional managers to localise content and campaigns easily, without compromising existing functionality.

## 3. Adopt rapid decision-making

Thriver brands that undertook digital transformation before and during the pandemic quickly recognised the need to make changes to their business processes, organisational structure, and resource optimisation... at speed. With this agility, Thrivers released new products and updates in a matter of days during the pandemic, rather than weeks and months prior.

- **Addressing crisis quickly:** The pandemic both magnified and exacerbated digital maturity. Thrivers displayed agility before and during the pandemic through rapid adoption of both short-term and long-term digital solutions, which enabled them to react quicker than competitors.
- **Clear, integrated multi-department planning:** The coming together of multiple teams across all departments to create integrated plans that address short-term emergencies and long-term measures, which are cost-effective and rapidly scalable.
- **Experimenting:** The quicker solutions get to market, the quicker Thrivers were at enhancing services with a test-and-amend approach to refine offers and rapidly re-deploy.



## 4. Enable continual learning/upskilling

It's no secret that many business leaders feel digital transformation is daunting – it's perfectly natural to approach change with caution. After all, employees need to be trained in a time-poor environment, and systems must be customised, sometimes localised, and deployed. Thrivers strive to equip their people with the right skills and permission to drive digital transformation.

- **Data use and metrics:** Thrivers foster data-rich cultures by using solutions that include enterprise-wide data across sales and marketing, operations, and reporting.
- **Online and video training:** Accelerated use of online and video solutions deliver required training for solutions and new processes or requirements, and fit in with remote and flexible working.
- **Rapid solution adoption and proof of concept (POC):** Thrivers understand time is of the essence, so they develop skills to accelerate analysis and procurement of solutions, then mobilise departments to develop POC, adopt and/or integrate solutions in an accelerated manner, often with tight vendor engagement.



## Above all, look to the cloud

The successful adoption of the majority of these traits relies on one key enabler: the cloud. Prior to the pandemic, the cloud represented the number-one digital transformation accelerator, with over **65%** of brands in Europe already adopting it, and **90%** considering it as their primary driver for digitisation. Encouragingly, during the pandemic itself, **20%** of brands further enhanced their use of the cloud through multi-cloud and additional cloud services.

The cloud truly has democratised technology, rightly claiming its place as the dominant infrastructure in the New Era In Experience. Solutions that live there are inherently scalable and flexible, with a menu of features that can be hand-picked for relevance, then tried, tested and course-corrected quickly.



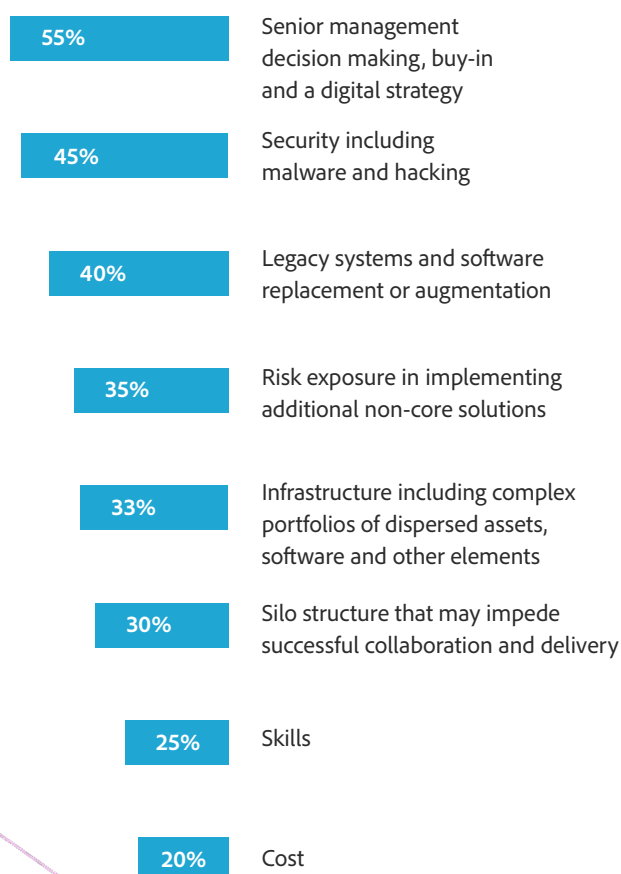


# Blockers to digital transformation

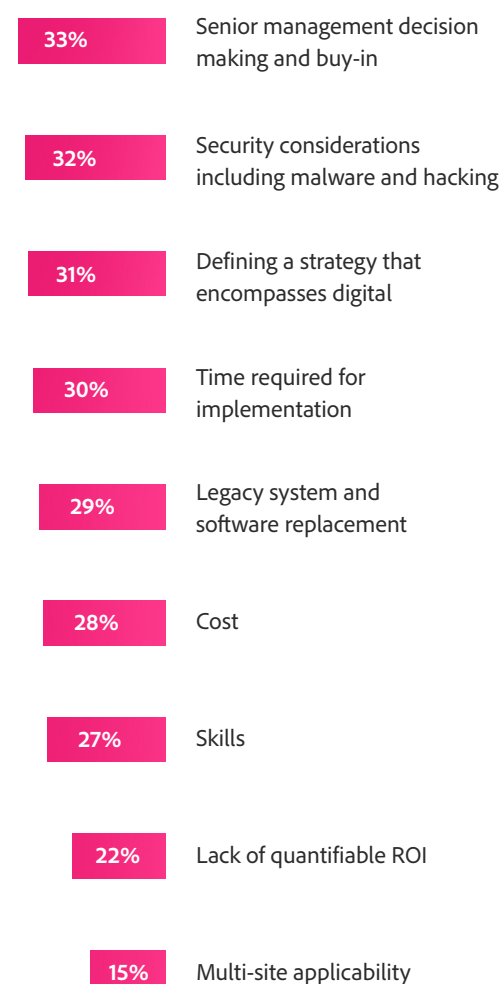
Despite the perception that the pandemic spurred a high rate of digital transformation, the research shows that only **60%** of planned changes to business operations during 2020 were **technology-related**, with only **38%** of the tech changes defined as 'permanent'.

While the hurdles below may, at first glance, seem intimidating, the success of Thriver brands demonstrates that many of these key blockers are surmountable – either via attitudinal changes among management or through a range of agile, digital, and scalable solutions.

## Key blockers for enterprise brands:



## Key blockers for SMEs and enterprises with fewer than 1000 employees:



# Four examples of Thriver brands



## Asprey: Transforming physical into digital

As one of the world's oldest luxury retail brands, Asprey has retained its intimate and boutique approach to customer experience since its inception in 1781. Despite undergoing a major digital transformation in 2006, many of Asprey's high-end customer journeys still rely on physical triggers, with people browsing stores in-person, touching, feeling and trying on products. The arrival of the pandemic, however, tipped Asprey's traditional retail model on its head.

**"COVID-19 was a shock to everybody,"** admits John Rigas, Executive Chairman at Asprey. **"We're a retail company where the basis of interfacing with a client is physical. For the super high end, the client wants to come in, wants the experience, and we had to effectively 'close the door'. That shock forced us to think through our whole business and ask, 'what are we going to do if this continues?'"**

Asprey's first step was to restructure – they ensured their employees' economic, physical, and mental well-being was looked after – before turning to ways to enhance their digital strategy and presence across both internal processes and the entire customer experience, including B2B supplier engagement.

At the beginning of May 2020, Rigas made the decision that Asprey would go 100% digital. **"By that stage, everybody had realised that it was the right thing to do, otherwise we would not survive,"** he recalls.

Asprey is confirmed as a Thriver brand, with only 5% of retail enterprises increasing digital spend in key emerging areas such as AI and blockchain. Indeed, one of its major investment areas was the use of blockchain to bring each specific milestone during a product's manufacturing process to life, treating customers to a complete view of their item's history and creation, from start to finish.

Digital technology has enabled Asprey to create this new brand of customer experience, at scale and for all its products. **"This not only adds value to the product itself – through confirmation that it was made with the proper values – but it also has great implications on how we interact with our clients and the supply chain,"** explains Rigas.



**John Rigas**

Executive Chairman  
at Asprey

“

**COVID-19 was catalyst to our thinking and it removed all resistance to rapid, across-the-board digital transformation**

”



**Vodafone Business:  
Digital innovation  
to elevate  
company culture**

As a digital-first organisation, Vodafone Business entered the pandemic in a more technologically-mature state than many of its peers, but the widespread impact of the pandemic still necessitated quick and decisive action in order to keep employees engaged, supported, and motivated. **"The pandemic reinforced that digital transformation starts at home and that non-conventional ways of working are now conventional,"** says Vinod Kumar, CEO of Vodafone Business. **"We made many changes to help our people, ranging from flexible hours, pulse surveys every six weeks, virtual gifts, counselling, sponsored kids camps on coding – all aimed at creating the strongest possible employee community."**

Collaborative apps enabled Vodafone's teams to maintain efficient ways of working during the initial stages of the pandemic; while behind the scenes, an innovation strategy was quickly created and delivered. Digital tools, especially collaboration platforms and mobile devices, formed the basis of the strategy's first phase for both Vodafone Business itself and its customers.

**"As we shifted past the pandemic's first stage, we experienced a clear shift during stage two in the use of digitisation to enhance productivity, agility, and time-to-market for product innovation at speeds and cost-effectiveness not previously seen,"** says Kumar. **"Everybody has embraced an agile mindset and we are getting them up and running remotely, collaboratively, and in adherence with regulatory requirements in a few weeks – unheard of before the pandemic."**

Kumar explains how the brand accelerated aspects of digital innovation while also enabling its customers – including micro-firms, SMEs and large enterprises – to benefit from Vodafone's internal lessons learned and accelerate their own digital transformation.

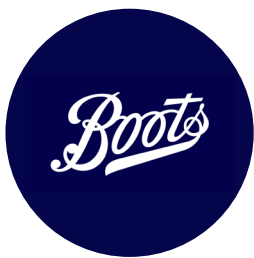


**Vinod Kumar**  
CEO at Vodafone  
Business

“

**We doubled down on investment during the pandemic across digital, technology, and innovation, and saw a number of our customers do the same. The benefits are there: we've seen customers roll out new applications in six weeks rather than six months**

”



## Boots: Integrating digital and physical to scale transformation

Boots represents a unique opportunity to scrutinise the impact of digital transformation on a business that, historically, relied on high street store visits as its primary source of revenue.

As the pandemic first hit, and throughout the subsequent UK-wide lockdowns, Boots poured investment into its digital offering; introducing a new online pharmacy and beauty service that increased capacity for digital sales, repeat prescription deliveries, and even virtual consultations.

Indeed, prior the pandemic, Boots was already in the process of launching some of its GP services virtually. But, reacting rapidly to the restrictions of lockdown, the service was scaled, scoped and delivered online to everybody. This virtual makeover also extended to physiotherapy and other services, as the Boots team widened the potential reach of digital activity to as broad an audience as possible.

As Rich Corbridge, CIO at Boots explains, the wealth of existing customer data the brand already possessed – thanks to its burgeoning loyalty programme – formed the foundation of its digital-first approach.

**“Our mission is to deliver extraordinary experiences that enrich our customers’ lives,”** he says. **“Possessing the ability to combine previously disparate customer data sets – including information from more than 100 million members of our loyalty programs – into more singular, unified view of the customer will enable us to truly personalise our omnichannel healthcare and retail offering.”**




**Rich Corbridge**  
CIO at Boots

“

**Our mission is to deliver extraordinary experiences that enrich our customers’ lives**

”



Boots perfectly demonstrate a key Thriver trait, rapid and agile decision-making. Indeed, the brand was already on its digital transformation journey prior the pandemic, but the leadership quickly realised they needed to fast-track their digital strategy. **“The pandemic definitely created an imperative to accelerate digital retail – it’s been hugely important for us, and the decisions about digital have sped up significantly,”** says Corbridge. **“It’s really impacted our bricks and mortar business and created an imperative for us to improve the online experience. You can see that in the change of mix in our sales pre-and post-COVID.”**

Even more impressively, despite the fact that Boots was able to remain open during lockdown due to its healthcare status, Corbridge and his team didn’t slow their digital transformation journey, implementing extensive integration between online and offline, with bricks and mortars shops rapidly transformed into hybrid stores in order to meet online fulfilment demands.

And the results speak for themselves. Boots’ business grew by 106% in its financial year-end in November 2020 and, over the initial UK lockdown period (March-June 2020), Boots doubled its website capacity, increasing home delivery slots, and driving a 78% increase in online sales. **“Our online business is dramatically more important than it ever was before,”** Corbridge says. **“Interestingly, that has drawn in both greater frequency from those that used to shop on Boots.com, but importantly, also more customers who did not previously engage with digital retail from Boots as a channel.”**

“

The pandemic definitely created an imperative to accelerate digital retail – it’s been hugely important for us, and the decisions about digital have sped up significantly

”





## Sunstar Europe: Empowering local regions



**Kelly Hungerford**

Director Digital  
Transformation Strategy  
and Services, Sunstar

Part of the Sunstar Group from Japan, Sunstar Europe SA is a B2B cosmetics and oral health brand, manufacturing and distributing products to healthcare professionals, pharmacies, and supermarkets.

Sunstar Europe embarked on its digital journey in 2016, hiring Kelly Hungerford as Director of Digital Transformation Strategy and Services, before introducing its first piece of in-house marketing technology in 2018. **"It was clear even before COVID-19, there was a need to retool everything from the bottom up across the way you work, across people, process and technology, working a lot on culture,"** she says.

Although Hungerford admits Sunstar's operating model in Europe is decentralised, it uses a 'glocal' approach – enabled by lean corporate management – to provide regions with the autonomy they need. Its marketing assets and campaign creation, however, is a centralised affair, meaning that local teams can take advantage of Sunstar's cloud-based marketing suite to tailor content to reflect local nuances and audiences. **"You maintain the guidelines and control your brand presence but leave the autonomy to the markets to execute,"** explains Hungerford. **"That is something that we strongly needed in order to build that one face to EMEA."**

This meant when the pandemic first hit, Sunstar was able to adapt almost instantaneously.

“

**If anything, COVID-19 has lit a fire under our feet. Our marketers are very articulate about what they need and, because we have the right infrastructure in place, we can power that fast**

”

In addition, Hungerford also notes the enablement of rapid campaign testing, results review, and re-launch – with teams undergoing intense analytics training over the past year, enabling them to quickly unearth and bring insights to action, a critical attitude during a time where conditions can change at the flick of a switch. Hungerford is honest about the limits of her teams, a leadership trait which will become increasingly significant in the coming months. **"We're not going to be perfect and we're not going to get it every time, but the times that we fail, we are going to double down and move even faster the next time,"** she says. **"We have to be really comfortable with failure, even in times of crisis."**





# Facing the New Era head on

Global pandemics don't observe calendar changes, but we head further into 2021 feeling more optimistic about our future, perhaps even imagining some returns, however incremental, to normalcy. The COVID-19 genie, however, will never be put back in its bottle. We lost moments that we cannot recover. We abandoned cherished rituals and created new ones. And, even with all our sacrifice, we gained certain freedoms: chiefly the ability to break the shackles of legacy infrastructure, and to transcend the limitations of distance by communicating remotely with colleagues, customers, and suppliers. So much of this was never previously possible, and won't be stalled by a return to the office or even a better-performing and more predictable bottom line.

What's more, there are opportunities for those ready to seize them, especially among brands whose leadership attitudes may be their only barriers to success. Even so, there's still a significant level of untapped potential, with only **25%** of brands achieving Thriver status, due to their long-term, deeper digital transformation focus. For the remaining three-quarters of Survivors and Hiders, the four key leadership represent a critical starting point for any future digital transformation aspirations.

Wherever you are in your journey, we hope this report has motivated and inspired you to take the next step, not only to Survive but to Thrive. Because if there's one lesson of the pandemic that will stay with us, it's how little in life we control. Brands must embrace digital transformation in this New Era In Experience or accept that their innovation, contributions, talent, and brainpower will remain hidden.

## Report methodology

This report encompasses pre-and-during pandemic activities across B2B and B2C brands, including insights from CIOs in 300 large French, German and UK enterprises; over 20,000 interviews with SME managers globally, and research that started in 2007 continuing throughout 2020; engagement with multiple big four digital and technology consultancies in the EU, results from brands across sectors, size and regions; ongoing deep engagement with enterprise managers in the retail and finance sectors across Europe; engagement with leading digital technology providers delivering pre-and-post pandemic B2B and B2C customer solutions; and additional ongoing CxO engagement with large and small enterprise leaders.



© 2021 Adobe. All rights reserved.

Adobe and the Adobe logo are either registered trademarks or trademarks of Adobe in the United States and/or other countries.