



2021 Digital Trends

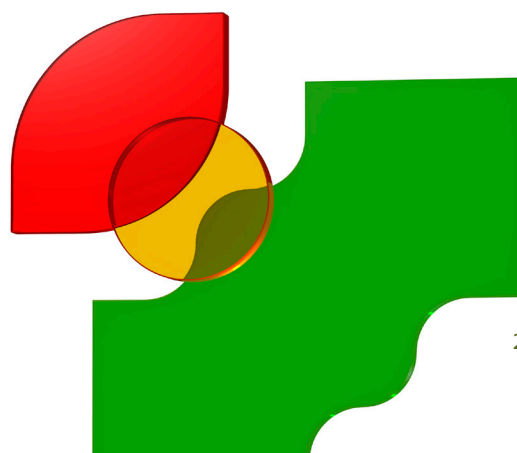
Manufacturing in Focus

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With over 13,000 participants in the 2020 study, more than 85,000 businesspeople from every continent (including Antarctica) have contributed their time and insights to this research since its inception in 2010. Their contributions make this the largest and most durable study of how digital trends are changing the marketing discipline.

Adobe and Econsultancy would like to thank everyone for their effort and insight.



Foreword

Welcome to Adobe's *2021 Digital Trends* report, our annual survey that charts the evolution of marketing, advertising, e-commerce, creative, and technology professionals around the world.

Last year, we published a landmark report to celebrate a decade of *Digital Trends*. As we celebrated its launch, nobody could have predicted what the next 12 months would bring. Well, it certainly hasn't been "more of the same." The global pandemic and the sustained level of uncertainty that followed led to the most innovative period in the history of marketing, essentially rewriting the rulebook for many businesses.

Instead of deviating from predicted trends, the dramatic events of 2020 have acted as an accelerant for digital transformation. Topics that were years away from consideration are now at the top of today's agenda. Whether demand for their products and services has increased or decreased, businesses are all grappling with the same challenges: remote working, new digital customers, the need for greater convenience, changes in buying behavior, and, on top of all that, their employees' and their customers' well-being. More than two-thirds of the companies with top-tier customer experience (CX) functions outpaced their sectors in the second half of 2020 and they were three times more likely to have "significantly outpaced" their sectors than the rest of the sample.

The results of our survey show that past investments in customer experience have paid off, which further underlines the importance of speed and personalization as we enter the new era in experience. As business leaders look toward the new year and scan the horizon for a return to normal, it's apparent that the new era in experience will be born digital. The economic



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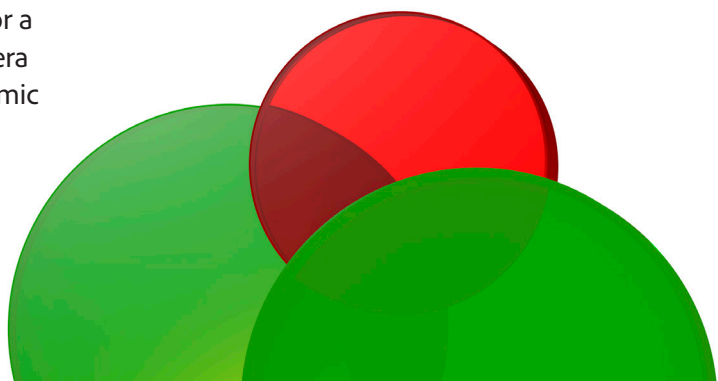
impact of this acceleration and the opportunities it presents will only become clearer as the dust settles. The *2021 Digital Trends* report, produced in collaboration with Econsultancy, brings key trends to life with startling clarity.

The *2021 Digital Trends* report looks to both the past and the future, presenting two equally valuable perspectives: what has changed in the last year as a result of the pandemic, and the trends that are waiting around the corner.

Thousands of seasoned professionals have shared their hard-won lessons of the pandemic—offering advice on everything from hybrid working and attracting talent, to catching up with the exponential rise of the digital-first consumer.

From these insights, we present three guiding principles for 2021: *empathy* is the future of experience, the new era is *disruptive*, and *brand purpose* is even more relevant.

With the world on the brink of change, this year's report provides timely insights to help marketers and business leaders realign their vision and bounce back stronger in 2021.



Executive summary

The manufacturing sector is at the forefront of many technological advances, with greater computer power, more powerful analytics, and advances in automation already being harnessed alongside cutting-edge engineering to transform many companies within this industry.

For those manufacturers that have attempted digital transformation but have not yet fully unlocked value from their investments in digital capabilities, the COVID-19 crisis has provided a much-needed wake-up call and has forced them to reimagine how they do business.

2020 will be remembered—in addition to its horrendous global human toll—as a challenging year for manufacturing businesses, but also as the time when concrete steps were finally taken to make the promise of digital technology a reality.

At the same time, as the global pandemic eventually recedes, manufacturers will need to be agile in adjusting to the new normal with respect to customer expectations, and using digital as a valuable point of differentiation.

This Econsultancy/Adobe report highlights how the technical and human components of digital transformation are crucial for success in an industry where customer journeys are increasingly made across virtual touchpoints, and competitiveness is defined by the quality of customer experience (CX).

The research also looks at how executives working in the manufacturing sector responded to the *2021 Digital Trends* survey, comparing their answers with those of their peers from other industries. The report also contrasts the differing strategies employed by top-performing manufacturers and those of the mainstream.

Key findings from the report include:

Digital channels grow in importance, but it's not either/or. Traditionally, routes to sales in manufacturing have had a strong offline basis, but this is changing and giving agile businesses an opportunity for competitive advantage. Offline is still going to dominate in the near term, but more than a third (37 percent) of top-performing manufacturing companies believe they will generate at least 50 percent of their sales through digital platforms within two years.

Restriction on face-to-face activity accelerated the shift to digital. The pandemic environment has driven home the importance of quality virtual interactions. For example, most manufacturers surveyed for this report say they have experienced unusual growth in digital/mobile visitors in the last six months (56 percent). Many also report changes in buying patterns and levels of churn.

Legacy technology, processes, and mindset get in the way of digital transformation. In the context of CX maturity, over a third (35 percent) of manufacturers consider their companies to be “not very advanced” or “immature,” with the majority agreeing that, while their CX strategy and technology are aligned, CX is not fully embedded yet (52 percent). Very few have aligned their marketing activities and data on a unified, cloud-based platform, and many in the industry indicate their digital initiatives are held back by unclear leadership, a shortage of digital skills, and weaknesses in KPIs.

There are marked differences between leading and mainstream manufacturing companies in how they approach business effectiveness and customer experience. Top performers recognize the fundamental need for data and technology to work together, and the critical role of understanding an ever-changing customer journey.

Section 1: An era of disruption is behind manufacturing's digital reboot.

While leading manufacturers have been able to use the crisis as a catalyst for change, it's not been without its challenges. The pandemic disrupted supply lines, so new ways of working have been required. This has pushed many companies into the world of digital business, whatever their level of preparedness.

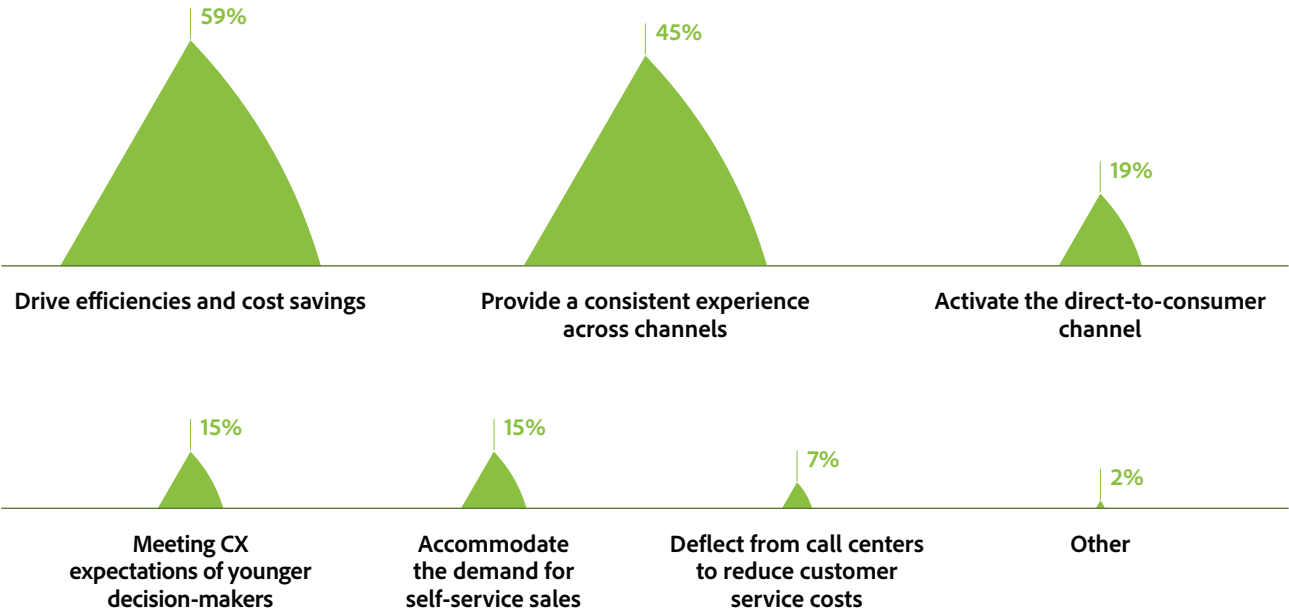
At the same time, those in the industry face an array of competing priorities. These include the increased use of smart, computer-integrated manufacturing, rising customer expectations, and the U.S.-China trade war. Organizations need to strengthen their businesses in what will be a highly challenging 2021.

Business heads have to focus on protecting profitability while also making sure they maintain or grow their market share—and they need to achieve this in a world where traditional ways of doing business have broken down. Digital capability, agility, and customer focus will be key.

Looking at the top two focus areas for manufacturing organizations in 2021 (Figure 1), most manufacturers are heavily focused on driving savings during the coming 12 months (59 percent). This is not only a reflection of the macroeconomic pressures accompanying the pandemic, but also the broader changes taking place in the industry.

Considerations include the digital-led vision of Manufacturing 4.0 and the smart factory, with analytics, automation, and the Internet of Things (IoT) used in tandem to bring about a new level of productivity and innovation.

Figure 1 **What are your organization's top two focus areas for 2021?**



Respondents: 615

■
"Industry 4.0: Reimagining Manufacturing Operations After COVID-19," McKinsey, 2020.

The focus on efficiency, however, is being dictated by the customer who expects well-made products that meet their needs and are affordable. Effective supply-chain visibility is an important building block here. This means having the right systems and processes in place to ensure that relevant data is shared with an often complex web of business partners.

The shift to digital as a result of the pandemic has also challenged manufacturers to review their customers' journeys and quality of experience. Unsurprisingly, then, 45 percent of manufacturers regard providing a consistent experience across channels as the second-highest key priority for 2021.

Digital-led shift in buyer behavior.

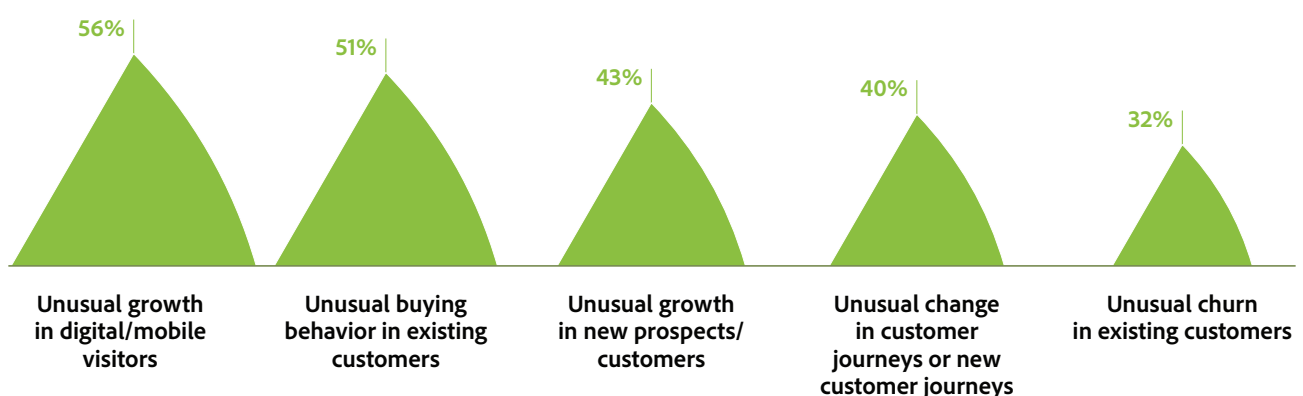
Manufacturers have had to work quickly on developing a digital-focused response to protect their competitive position. Figure 2 illustrates that, over the second half of 2020, a majority have experienced "unusual growth in digital/mobile visitors" (56 percent), while more than half of manufacturers (51 percent) reported "unusual buying behavior," such as in the type or size of purchases.

The year featured both business opportunities and challenges. On one hand, there was unusual growth in new prospects/customers (43 percent); on the other hand, there was also unusual churn in existing customers (32 percent).

The pandemic has also fast-tracked more fundamental changes to the go-to-market models which were already starting to become apparent. Manufacturers that previously only sold through distributors are now enabling or considering sales via e-commerce platforms, direct-to-consumer ventures, and B2B marketplaces. Also, new forms of strategic partnerships that give faster time to market, better brand control, and greater profit margins have emerged.

The survey shows that the industry as a whole is very positive about the growing role of online channels, with 78 percent of those surveyed regarding the movement of customers toward digital channels as a "positive disruption" (i.e., an opportunity rather than a challenge).

Figure 2 **Thinking about the last six months to today, has your organization experienced any of the following customer behaviors? (Yes only)**



Respondents – Manufacturers: 221

Honeywell is a good example of a manufacturer that recognized and acted on the digital opportunity by launching an online marketplace dedicated to aerospace and aircraft parts. The company launched its digital marketplace within three months, with one online buyer researching and executing a \$100,000 purchase just minutes after registering.

However, the majority of sales will still take place offline.

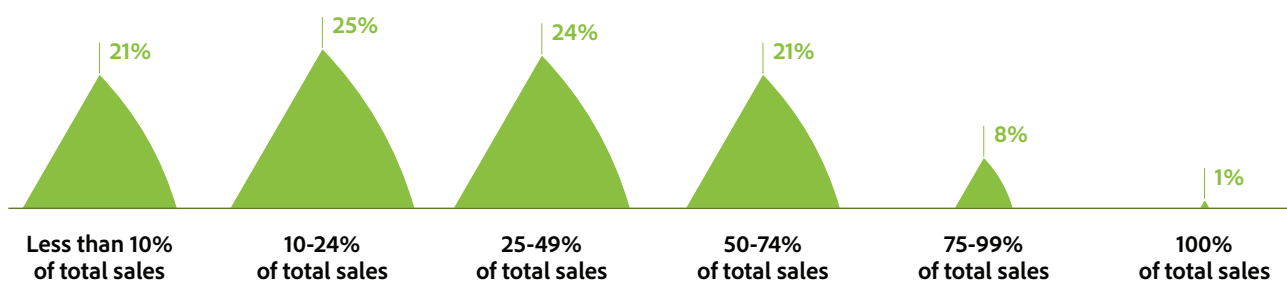
Adapting to the digital opportunity requires a transformation of culture, mindset, methods of working, and technology, with the marketing department at the heart of commercial activity. But given the monumental scale of the task at hand, it's unsurprising that most manufacturers expect that the bulk of their sales will continue to take place offline, at least in the short to medium term. As illustrated in Figure 3, 7 in 10 expect digital to still make up less than half of their sales over the next two years.

Nonetheless, even if customers are still conducting the final transactions offline, digital marketing is becoming more important as buyers do more of their research through digital channels. Recently, Forrester Research found that 42 percent of B2B purchases are now made digitally, the pandemic environment driving home the importance of quality virtual interactions.

Connecting with customers and prospects digitally will help manufacturers address their two main priorities: driving CX improvements and generating savings. But these goals will only be successfully achieved if they are approached strategically, with the right platforms and resourcing.

Medical technology supplier Stryker Orthopaedics, for example, bolstered its sales and reduced production costs after adopting Adobe's Digital Publishing Suite to support the creation of interactive mobile magazines for their sales reps to share with clients and prospects. The move was said to have cut production time considerably. Stryker indicated it experienced strong adoption of the magazines, described as "clean, digitized brochures" by sales reps and stores.

Figure 3 **Thinking about two years' time, what percentage of your organization's sales will come from digital channels?**



Respondents: 503

Danny Dalton, "Three Imperatives the Manufacturing Industry Can't Afford to Ignore," Adobe, 2020.

"New Research Revealed at Forrester's SiriusDecisions Summit 2020 Shows Coronavirus Pandemic is Accelerating Modern B2B Buying Behavior," Forrester, 2020.

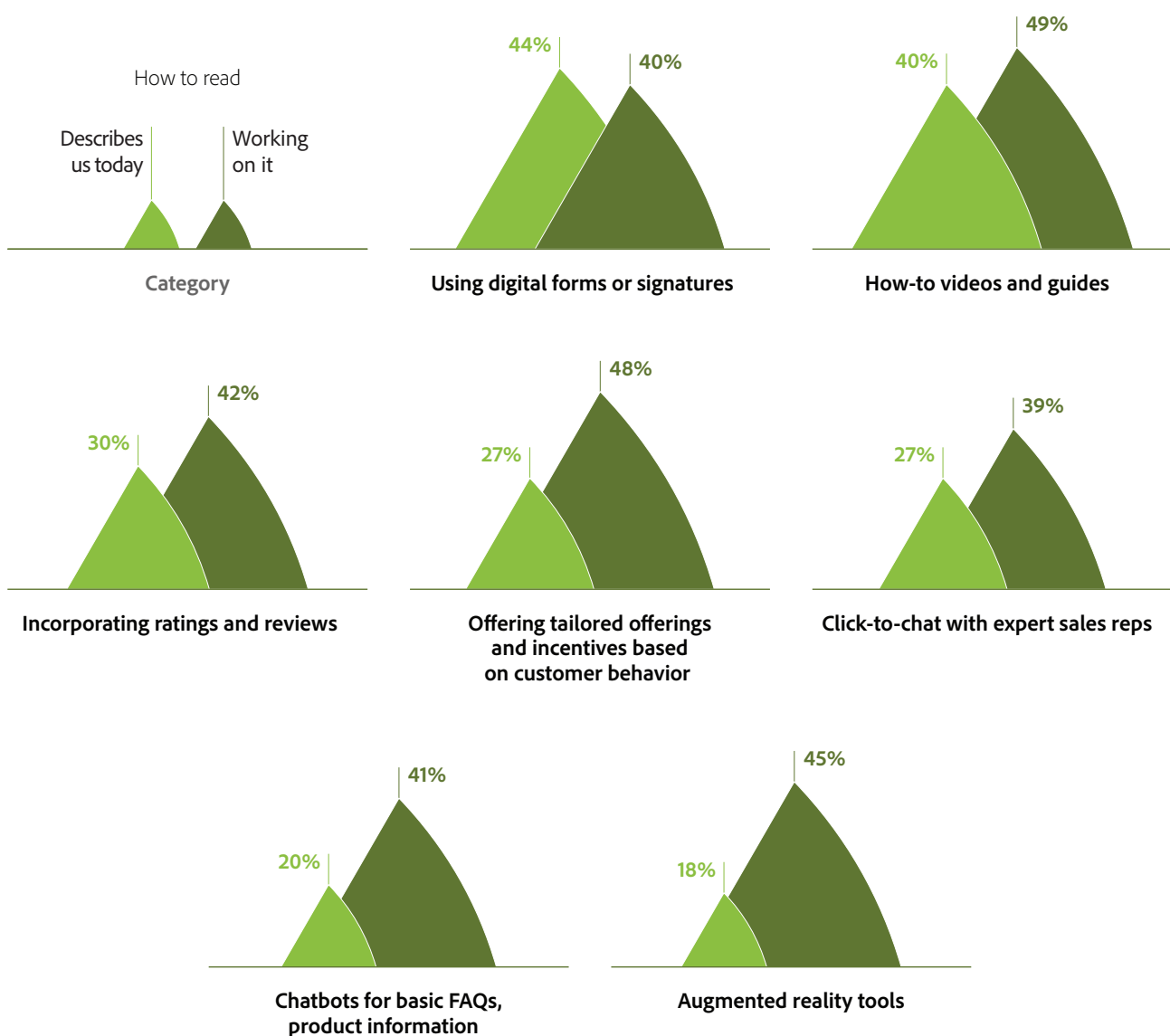
Maria Minsker, "Stryker Takes Brochures into the Digital Age with Adobe's Publishing Suite," Destination CRM, 2014.

Bridging the digital divide.

Initiatives by companies such as Honeywell and Stryker underscore how manufacturers can provide better experiences to digitally focused customers. Encouragingly, given that more and more customers are starting their journeys online, a significant proportion of manufacturers are either currently offering or working on research aids such as how-to videos and guides, tailored offerings and incentives, and ratings and reviews (Figure 4).

Most manufacturers are also either already using (44 percent) or working on implementing (40 percent) digital forms and signatures. Given pandemic-related barriers to physical meetings, it's unsurprising that organizations are supporting routes that minimize contact between buyer and seller. At the same time, such methods can significantly reduce unnecessary friction in the partner experience by fast-tracking procurement and sales processes.

Figure 4 **Please indicate your organization's capabilities when it comes to optimizing the digital experience**



Respondents: 538

Section 2: Manufacturers face cultural and technological hurdles.

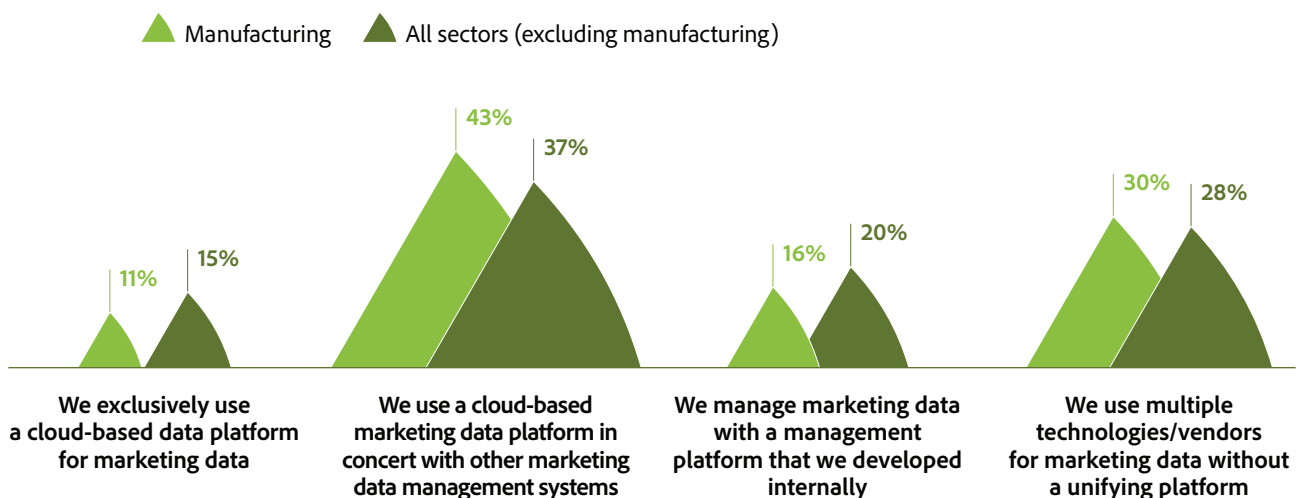
In order for businesses to be successful in the digital realm, they have to overcome a number of challenges. Having the digital technology foundations in place is key to handling high-velocity and high-volume data. It is also behind CX delivering excellence through capabilities such as real-time and personalized interactions, digital self-service, and a single customer view. For some, this is still a work in progress.

Developing digital technology foundations can also mean overcoming considerable internal barriers. For example, when asked what was holding up their marketing/customer experience organization, our survey found 4 in 10 respondents citing workflow issues and legacy technology.

Manufacturers aren't always in a position to start from scratch and "reboot" with a new, unifying platform. As illustrated in Figure 5, manufacturing executives are most likely to be gaining access to the cloud alongside existing marketing data management systems (43 percent) with only a minority having already moved to an exclusively cloud-based ecosystem (11 percent).

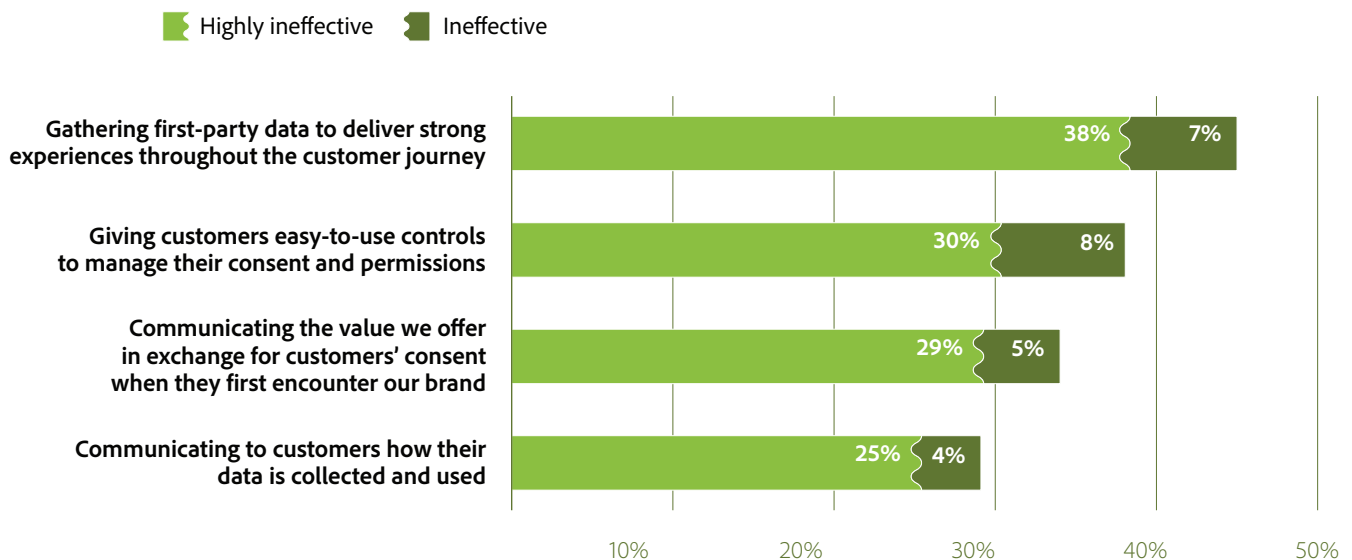
Even as companies try to cut costs and reduce the number of vendors they use, they will have to rely on a complex ecosystem of third-party platforms and in-house and point solutions for some time, especially at large organizations.

Figure 5 **Which of the following best describes your organization's approach to marketing technology?**



Respondents – Manufacturing: 477; all sectors (excluding manufacturing): 3,733

Figure 6 **How do you rate your organization in the following areas?**



Respondents – Manufacturing: 246

Meeting customer needs for relevancy and privacy.

Content is the lifeblood of digital experience. Understanding content and how customers interact with it is key for marketers who seek to deliver the kinds of customer experiences that build loyalty. Global manufacturer Philips is an example of a manufacturer that has, in recent years, driven significant improvements to its customer-interaction tracking capabilities as a result of a transition to a single cloud-based digital marketing platform.

The company is able to tag content and measure customer interactions across 260 million website visits and 1.4 billion page views annually. In addition to gauging the impact of content across the customer journey, executives are empowered to measure KPIs such as buy-lead conversion and self-service interactions to clarify exactly how these are driving revenues.

As this example illustrates, providing relevance requires access to data—especially first-party data. Gaining access and keeping it depends on earning and ensuring customers' trust. The most effective way to build this is through a transparent and fair value exchange. It's also something that a significant proportion of manufacturers still fail to achieve.

Nearly one-third of respondents state they are either "ineffective" or "highly ineffective" (29 percent, Figure 6) when it comes to informing and empowering customers about data usage, and more than one-third seem to be failing to build the trust and confidence required to get first-party data flowing by communicating the value (34 percent).

■
"Philips Crafts a New Digital Identity," Adobe, Customer Success Story.

On the way to joining the dots.

The exploitation of digital capabilities can be daunting, even for the more digitally adept manufacturers. Customer journeys are complex, due in no small part to the high-value and multi-layered nature of purchases. These can involve solutions of goods, services, and support that cut across both capital and operating expenditure budgets.

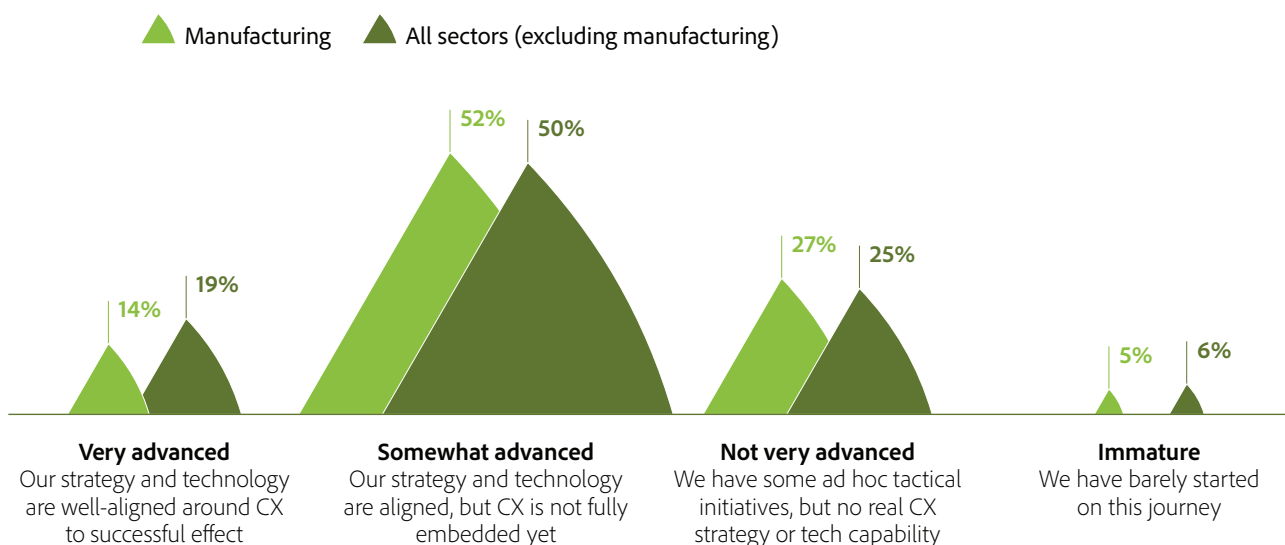
Even in the B2B space where relationships are more often built on a one-to-one, face-to-face basis, personalization can be complicated. The sale of complex solutions now typically requires persuading 6 to 10 decision makers, while simultaneously understanding multiple influencers and feeding them the right content at the right time. Successfully accomplishing this juggling act requires sophisticated account-based marketing.

Some progress has already been made. Fourteen percent of the manufacturers rate their company's CX maturity as "very advanced," meaning their strategy and technology are well-aligned around CX (Figure 7). An additional 52 percent are getting closer to that goal but are not quite there yet—while they rate their company's CX as "somewhat advanced," their

strategy and technology are aligned but CX is not fully embedded yet. That the potential in digital capabilities is running ahead of organizations' ability to deploy them is seen in the next section of the report. For example, more than one-third of manufacturing respondents agreed that their organization wasn't considering chatbots (38 percent), augmented reality tools (37 percent), or "click-to-chat" with expert salespeople (34 percent). This is striking, particularly given the prevention of in-person visits by technicians and sales reps as a result of the pandemic.

Some companies struggling to preserve cash may understandably regard investment in the digital experience and broader digital transformation as a luxury they can't afford right now. However, according to McKinsey, retrofit automation for use cases such as augmented-reality-based assistance and digital performance management can also be possible, even within an existing legacy technology infrastructure, without any expensive replatforming necessarily required.

Figure 7 **How do you rate your company's customer experience (CX) maturity?**



Respondents – Manufacturing: 666; all sectors (excluding manufacturing): 5,818

■ "New B2B Buying Journey and its Implication for Sales," Gartner, 2020.

"Industry 4.0: Reimagining Manufacturing Operations After COVID-19," McKinsey, 2020.

Leadership and people challenges.

Digital solutions alone won't replace the value of human interaction, particularly within the manufacturing sector. It's crucial, therefore, that in addition to having the right technology platform, executives also place an emphasis on upskilling the human side of the equation.

However, our survey indicated that many manufacturers have significant capability gaps in this respect. For example:

- **Leadership needs to step up and make faster decisions:** Six in 10 executives acknowledge that within their businesses, ownership and leadership of digital initiatives aren't always clear. This is unfortunate because having a leadership team that is fully bought-in to the value of digital is vital to progressing CX strategy and initiatives, especially during a period of sudden change, such as the coronavirus pandemic. Accelerated decision-making is also required if manufacturing companies want to seize the digital initiative. Leaders need to make faster decisions in an environment where they are encouraged and rewarded for doing so.
- **Low understanding of the customer:** More than half (55 percent) of manufacturing executives agree their businesses lack key customer-centric digital skills, such as design thinking and journey mapping, which are crucial for any organization aspiring to be truly omnichannel and customer-experience-driven.
- **Digital illiteracy:** Thirty-eight percent of manufacturers cite internal barriers such as lack of digital skills/capabilities with regard to marketing and CX progress.

According to a report by the U.S. National Skills Coalition, one-third of manufacturing workers have limited digital skills. Technology plays an important role in reducing unnecessary burdens; for example, through better automation of tasks and processes.

Upskilling employees to make effective use of technology solutions doesn't just improve their efficiency. It frees up space for them to make the most of their human resources. This can be expressed in creative responses to customer relationships, developing new systems, creating new channels of communication, and even increasing output.

Lennox, a heating and cooling systems supplier, is a good example of a manufacturing company that has benefited in this respect. The company underwent what it described as a "complete digital transformation" as part of an attempt to join up its sales and marketing functions. Lennox introduced Marketo Engagement Platform within its residential business unit to improve processes and business performance. This helped the organization push digital-led engagement with its dealer base through increased field training classes, coupon-driven loyalty programs, digital product launches, and lead-generation campaigns.

■
"One-Third of Manufacturing Workers Have Limited Digital Skills," Industry Week, 2020.

Section 3: The secrets of top-performing manufacturers.

In a time of serious disruption, it's all the more important to identify the characteristics of top-performing manufacturers to indicate how the wider industry can emerge stronger from the COVID-19 crisis. Here we compare executives working in organizations that "significantly" or "slightly outperformed" their primary competition during the last six months of 2020 ("leaders") with those that either "kept pace" or "underperformed" ("the mainstream").

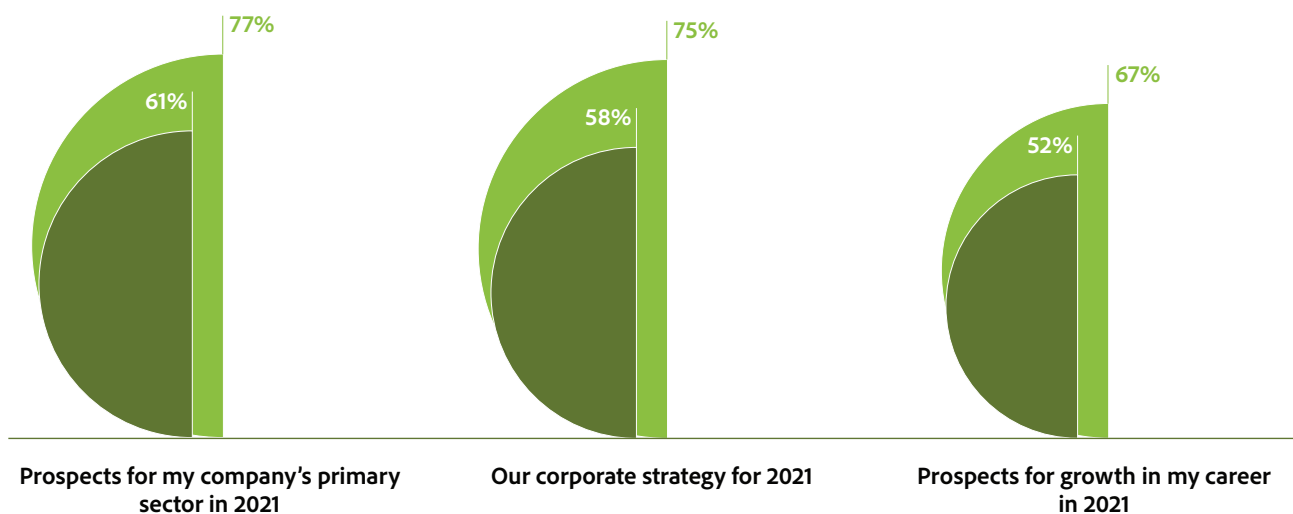
It would be natural to assume that a strong balance sheet or robust supply chain would define top performers, but one striking aspect of top performers is their optimism. Looking toward the rest of 2021, such executives are more optimistic about growth in their career, their company's corporate strategy, and their company's prospects (Figure 8).

Even mainstream respondents are far from being downbeat. The most likely explanation for this optimism—across the entire sector—is that executives are increasingly looking ahead, seeing past the pandemic, which will in turn alleviate the economic crisis and spur growth and recovery.

Figure 8 **Levels of optimism with regard to the future**

In general, how do you feel about the following?

● Top Performers ● Mainstream



Respondents – Top Performers: 138; Mainstream: 173



No opportunity goes to waste.

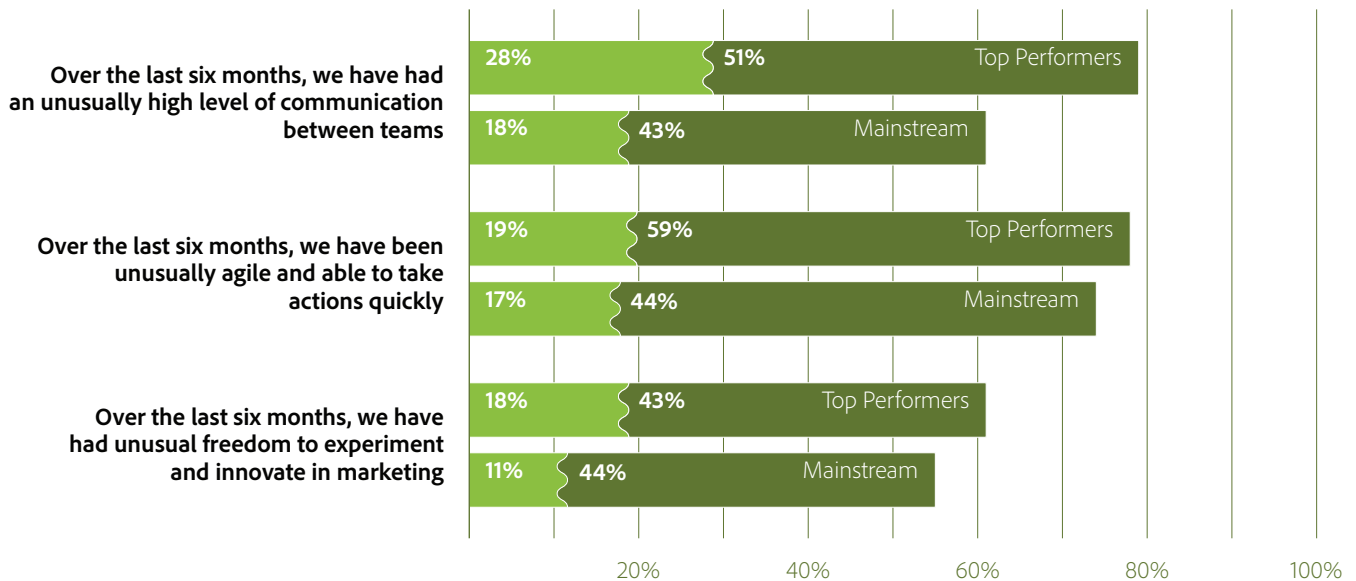
But top performers can perhaps afford to have a rosier view of the future because they have built agile organizations to quickly scale up and take advantage of potential future demand. Effective paths of communication and a focus on digital service delivery mean they are able to make decisions quickly and capitalize on new opportunities (Figure 9).

Data and technology in harmony.

Figure 9 **Attitudes toward the way companies have responded to recent trends**

Do you agree or disagree with the following statements?

 Strongly agree  Agree

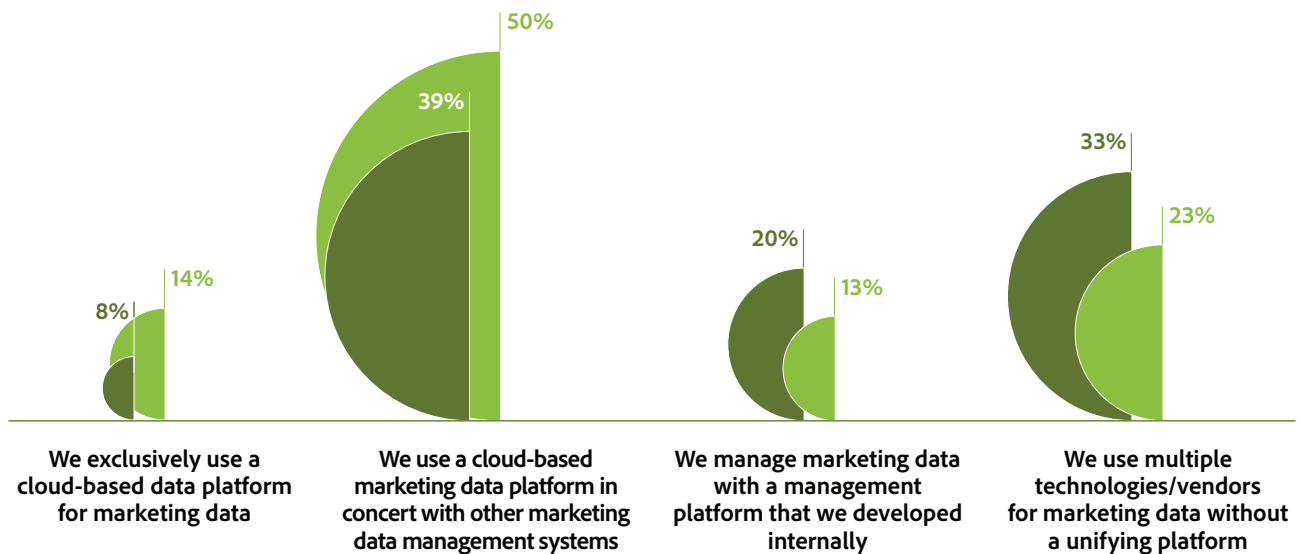


Respondents – Top Performers: 148; Mainstream: 195

Figure 10 **Organizations' approach to marketing technology**

Which of the following best describes your organization's approach to marketing technology?

Top Performers Mainstream



Respondents – Top Performers: 138; Mainstream: 173

Such rapid decision-making is supported by the all-important data. Supported by a solid technology infrastructure, leading companies are more likely to use cloud-based data management platforms (64 percent either “exclusively” or “in concert with other systems,” Figure 10) compared to just under half of the mainstream (47 percent).

Marketing and IT: A common language and shared goals.

To deeply understand the customer and deliver strategically crafted experiences, marketers must have a comprehensive picture of the buying journey. This is only made possible through tech teams connecting internal systems to build dynamic, unified profiles of the customer.

As illustrated in Figure 11, IT respondents in top-

performing manufacturing organizations are more likely to support their marketing technology needs via cross-functional teams that combine marketing and IT or tech personnel (50 percent versus 41 percent of the mainstream).

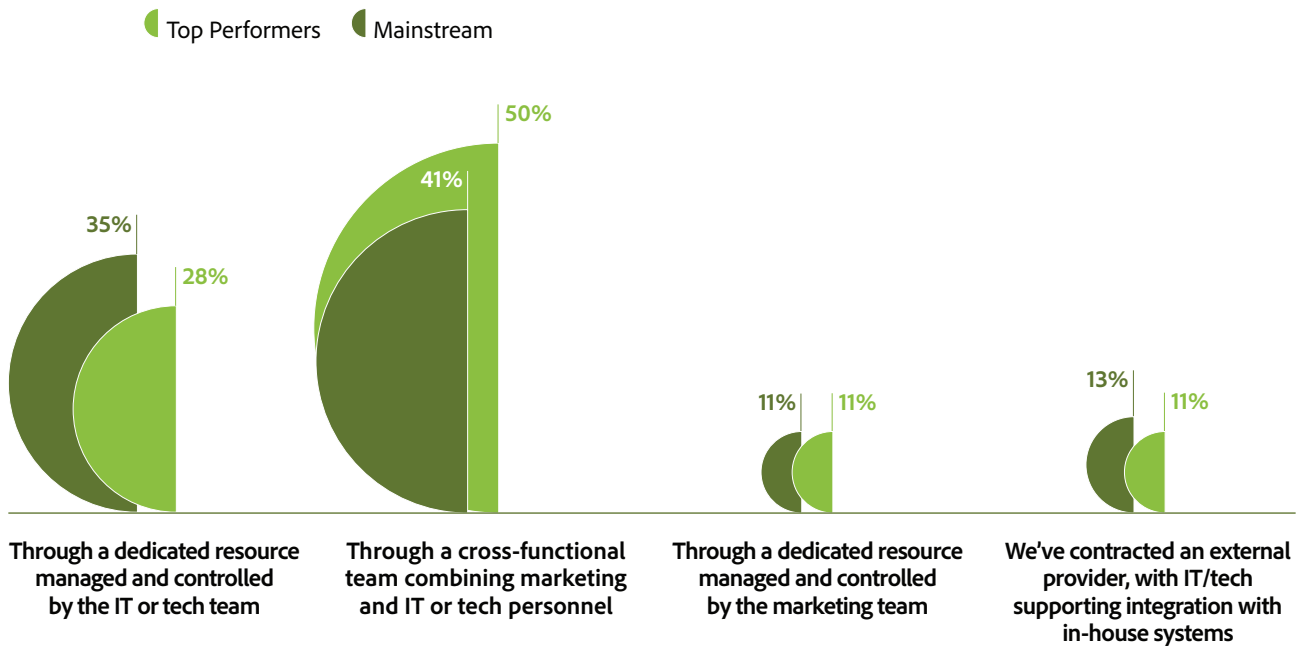
Understanding the customer: Yesterday, today, and tomorrow.

As night follows day, customer data feeds martech systems that, in turn, yield vital insights into customer behavior. The difference between leading and mainstream companies is that the former make better use of it—top performers are more likely to claim significant insight into the journeys of new customers (24 percent versus 16 percent for mainstream) and attribution of how marketing actions relate to customer behavior (27 percent versus 19 percent).

This level of insight also means that respondents working in top-performing firms have a wider

Figure 11 **Approaches to supporting marketing technology needs**

What is your organization's main approach to support marketing technology needs?



Respondents – Top Performers: 80; Mainstream: 105

appreciation of just how much customer behavior has changed over the last year. For example, our survey found that executives at top-performing firms are more likely to have tracked unusual growth in new prospects and customers (52 percent versus 36 percent of the mainstream) and unusual buying behaviors of existing customers (63 percent versus 44 percent).

It quickly becomes apparent that the behaviors of top-performing companies are feeding a virtuous circle—trusted sources of data help technologies deliver critical insights which can be shared between teams with strong lines of communication which, in turn, gives leaders the confidence to take quick, decisive action and capitalize on changing conditions.

Strengths supported by weaknesses.

It would be easy for top performers to tip over from confidence into arrogance, which could set them on a slippery slope. Curiously, our research indicates that executives working at top-performing organizations are far from resting on their laurels.

All too aware of opportunities to engage newly enthusiastic digital customers and the need to keep up with ever-increasing customer expectations, such executives are more likely to be aware of their organization's shortcomings—for example, being more likely than the mainstream to regard legacy systems as holding the customer experience organization back (46 percent versus 36 percent).

This awareness makes leading organizations more likely to scrutinize their performance, engage the whole company in working toward a solution, and stay vigilant, cognizant that a solution in today's fast-moving world is never going to be "one and done."

Which digital capabilities are top performers investing in?

Given their reliance on data and technology and the speed with which they act, it's unsurprising that digital plays a big role for top-performing manufacturers. In fact, even though offline sales are expected to make up the majority of sales for the near future (as reported in Section 1), top performers are already bucking the trend. More than one-third of such executives (37 percent) expect digital to account for 50 percent or more of their organization's sales within two years. This compares to 22 percent working at mainstream companies.

As far as having the tools to optimize digital experiences today, Figure 12 illustrates that top

performers are more likely to currently offer tailored offerings and incentives based on customer behavior. This group of executives are also 8 percentage points more likely to offer digital signatures.

Many of the strategies and digital solutions that leading organizations take advantage of are not expensive, disruptive (in the organizational sense) technologies. From a structural point of view, opening lines of communication, seeking to upskill and automate basic tasks in order to free up employee time are initiatives that can be adopted by every manufacturing business today. And from a digital adoption perspective, the simple act of offering reviews and ratings, hosting how-tos online or using digital forms can drive an uplift in customer experience and business effectiveness larger than any outlay in cost or resource.

Figure 12 **Please indicate your organization's capabilities when it comes to optimizing the digital experience (describes us today)**



Respondents – Top Performers: 230, Mainstream: 278

Conclusions: Five key takeaways for the manufacturing sector

1. Start at the beginning, with strategy.

Building high-level digital competence can be a complex affair but is well worth the effort. Certainly, there can be plenty of technical, cultural, and organizational bottlenecks to stop initiatives from meeting expectations. But if driven by leadership with clearly defined, realistic goals and a roadmap as to how the digital agenda will impact different departments across the business, plans can become reality.

2. Bring in a change agent to drive cultural change.

Manufacturing organizations struggling to pivot toward a more customer-centric approach should consider bringing in a change agent to ensure that a CX-focused agenda doesn't fall by the wayside. These change agents might be leaders from outside the manufacturing industry, such as retail. Such change agents can help to instill the type of behavior and processes required to ensure that leadership are walking the walk, and that different stakeholders and departments are bought into the process.

3. Aggressively address organizational and technical silos.

Empower the marketing function with a unified IT platform and build new working relationships across the business but particularly with the sales force. Managers need to promote a new level of agile and collaborative working across all departments.

4. Embrace the challenge of becoming a customer data leader.

In the last 10 years, cutting-edge technologies have moved into mainstream manufacturing, with the cost of sensors, cloud infrastructure, and processing power having dropped significantly. This has led to the vision of the “smart factory” through modernizing and digitizing operations to manage quality issues more effectively and modernize operations.

In adjusting to customers' digital expectations today, executives have the opportunity to feed off the culture changes, skills, and technology upgrades that are currently under way. At the same time, the expansion to new go-to-market models will enable manufacturers to collect more data that will feed into better products, increased sales, and stronger relationships.

5. Encourage experimentation and innovation.

Digital initiatives can only gain momentum if executives are empowered to take risks and try out fresh ideas. Technology is not the solution to innovation, but through automation and improved efficiency it creates the ideal conditions for developing more creative approaches. Give employees license to experiment. This will create champions for new, innovative technology and techniques—and help push the digital agenda forward, creating new ways to connect with customers.

Methodology

Digital Trends 11th Edition is based on an online survey fielded to select Adobe and Econsultancy lists in the fourth quarter of 2020. The survey closed having collected 747 qualified responses from the manufacturing sector.

Demographics profiles

- Sixty-nine percent of all the responses were at manager level or above.
- In terms of business function, IT held the largest share of respondents (30 percent), followed by marketing (24 percent), creative/design (13 percent), and operations (9 percent).
- As defined by target market, B2B accounted for 56 percent, followed by those addressing both markets equally with 35 percent and B2C (9 percent).
- The sample is global, with Europe providing the largest share of respondents (45 percent) followed by North America (30 percent), and the Asia-Pacific region (20 percent).

