

2021
EDITION

THE STATE OF DIGITAL CUSTOMER EXPERIENCE

Rising Ambition & Competitive Edge

1,300+
Executives
Surveyed

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Introduction

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Founder and CEO of Simpler Media Group

Digital Customer Experience (DCX) has never stopped evolving and advancing. Brands continue to push boundaries and raise the bar, delivering digital experiences that are more sophisticated, targeted and impactful than those that have gone before.

The idea that brands can operate outside the DCX arena is now laughable. It's the space where brands can gain a competitive foothold and where customer loyalty and brand retention must be earned every day. It's where customers consume, interact and buy.

COVID-19 has only accelerated and amplified the importance of DCX, pushing our collective reliance on digital to new heights, and triggering more activity and innovation.

Today's DCX teams are highly motivated to create and deploy great customer experiences, but they face many obstacles and challenges. Technology, infrastructure, siloed systems and thinking, issues with data and immature management practices can all lead to barriers that ultimately blunt DCX delivery. The new reality of hybrid working, a bleak economic environment

and a pandemic that is still ongoing also present obstacles.

But despite the uncertainties of 2021 and beyond, there is evidence that indicates we are making genuine and exciting, real-world progress. Ambition is returning, investment is increasing and DCX is rising on the list of priorities.

In this 7th annual State of Digital Customer Experience Report we've analyzed inputs from over 1,100 digital customer experience executives. The insights included in this report provide valuable insights to support planning, influence decision-making and start the right conversations.

We also hope it gives you a cause for optimism that things are truly moving again and that we can look forward with excitement to the years ahead.

Brice Dunwoodie,



10 Key Takeaways

1 Don't stop believin': DCX remains an essential pandemic priority DCX is regarded as being very or extremely important by 80% of organizations, remaining a critical area during the pandemic. COVID-19 has failed to blunt DCX team ambition and teams remain in an improvement and growth mindset.

2 The old normal and the new normal: Overall marketing operations have been less impacted by COVID-19 than expected. Overall, the proportion of DXC teams significantly impacted by the COVID-19 pandemic is less than might have been expected. However, some report scaled-up activity, new working patterns and a fresh emphasis on DCX.

3 Delivering the goods: Technology and tools are more effective than ever After years of feeling distinctly underwhelmed, DCX teams are growing confident in the effectiveness of the tools they use everyday. Those saying their tools are working well have nearly doubled in a year, while those saying their tools need work has halved over two years.

4 Show me the money: More teams investing in DCX, fewer report budgetary challenges Despite the difficult economic conditions, DCX professionals are seeing the green shoots of investment and easing of budgetary constraints. More teams have had investment plans greenlit, while budget and resourcing is no longer their number one challenge.

5 Peace, love and understanding: Teams struggle to understand customers, but tools help DCX executives still do not understand customers as well as they'd like, but those with effective DCX tools are far more likely to feel they know their customers well.

6 Keep it under your hat: A culture of protecting customer data is emerging The vast majority of DCX teams want to lead with data privacy, going beyond regulatory commitments and putting customers in control of their data.

7 Artificial intelligence, Real-world interest: more DCX teams see value and plan to invest AI is making a breakthrough with an increasing

number of DCX professionals regarding AI as transformative and a surge in interest in actively investing in AI.

8 Getting to know you: Personalization maturity picks up speed For the first time, over half of organizations have some kind of personalization in place, and at least 40% of these are enjoying the benefits of personalization efforts that are starting to mature.

9 The office stampede stalls: Few DCX teams plan a full return Less than one in ten DCX teams are planning a full return to the office, but organizations are investing in organizational culture initiatives and structures to make up for the impact of prolonged remote working.

10 Seven habits of highly effective DCX teams: Organizations with DCX maturity lead across several areas Leading DCX teams tend to have more effective tools, a better understanding of customers, more advanced personalization, higher overall prioritization of DCX, more confidence in AI, a greater desire to lead with data privacy and a stronger belief in the value of employee experience.

Digital Customer Experience in Perspective

For organizations, CX teams and the customers they serve, digital has been a lifeline during COVID-19, filling the void left by the decline of in-person touchpoints with customers. DCX has assumed a new importance and flourished as a result. However, progress is tempered by the reality of a delicate economy, wavering consumer confidence and the logistical challenges and learning curves associated with working remotely.

We wanted to better understand DCX in 2021, both in terms of the overall progress we have made as an industry and professional discipline, but also within the context of the pandemic. In this section, we cover the prioritization placed on digital customer experience and try to understand the impact of COVID-19 on key topics such as working patterns and levels of investment.

Digital Customer Experience Remains a Pandemic Priority

The greater emphasis on digital touchpoints during the COVID-19 pandemic has ensured that DCX continues to be regarded as being of great importance by the vast majority of organizations. Four-fifths of respondents told us they classed DCX as being “extremely important” (40%) or “very important” (40%). This figure of 80% is identical to the results in 2020, showing DCX has retained its critical status over the life of the pandemic.

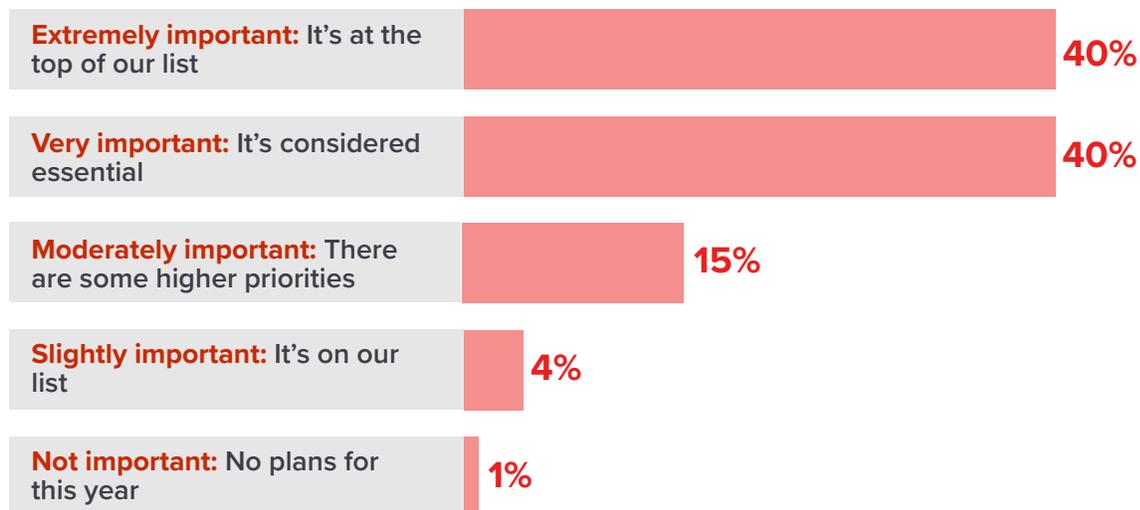
Of those declaring DCX as “extremely important,” organizational size was a factor, with larger organizations with over 5,000 employees more likely to class DCX as “extremely important” (45%) compared to smaller and medium-sized companies (both 37%). Interestingly the proportion of technology vendors declaring DCX as “extremely important” was very similar

to the non-vendor organizations that make up the focus of this report (41% compared to 40%).

Overall these figures show the overwhelming prioritization of DCX across businesses. Even taking into account the natural biases of customer experience professionals, this figure is high, with the percentage of those regarding DCX as “not important” flatlining at approximately 1%, the same very low figure returned in every survey since 2016.

The survey results also hints at a link between those who prioritize DCX and how they rate the effectiveness of the related tools. Organizations who declare that their DCX technology and tools are “working well” are significantly more likely to regard DCX as being “extremely important” (64%) compared to those who declare their tools as “satisfactory” (33%) or “needing work” (36%). Prioritizing DCX may result in a greater investment in tools and a level of maturity that makes tools more effective and also reinforces the value of DCX, explaining the positive correlation here.

How important is delivering quality digital customer experiences for your organization?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

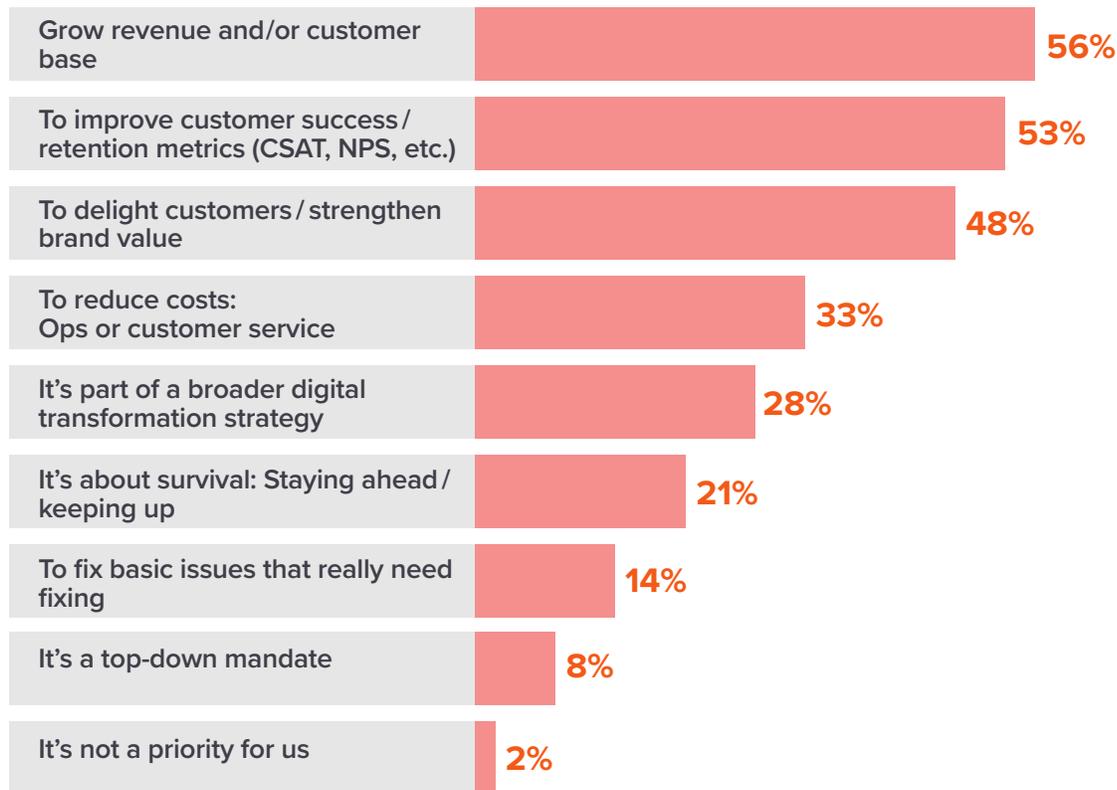
Desire for Improvement and Growth Drives Commitments to DCX

We also asked why DCX was a priority for organizations. The survey shows that the dominant drivers for DCX teams have remained remarkably consistent over the past three years, with 2021's three most popular answers — “Grow revenue and/or customer base” (56%), “To improve customer success / retention metrics” (53%) and “To delight customers/strengthen brand value” (48%) — also the three most popular in 2019 and 2020, although not always in the same position. In 2021 these three answers were also the most popular responses among technology vendors.

It's not surprising that the need to grow revenue, drive customer retention and strengthen brands continue to drive the commitment to deliver high quality DCX. What's interesting about these three most popular responses is that they all focus on improvement and moving forward, surpassing other responses that focus on reducing costs (33%) or are more about survival, fixing issues or about the mandate the team has been given. Despite the difficult conditions created by the pandemic, DCX professionals are still exhibiting a healthy, improvement mindset and an ambition to move things forward.

A closer look at the data reveals some variance in answers from organizations of different sizes. The most striking is that larger companies are tending to prioritize DCX as part of a wider digital transformation strategy (46%), compared to medium-sized organizations (29%) and small organizations (16%). Other reasons for prioritization more likely to occur across larger organizations include “to delight customers, strengthen brand value,” and “to reduce costs: ops or customer service.”

Why is digital customer experience a priority for your organization?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Budgetary Concerns Are Easing but Challenges Remain

Even if digital customer experience teams are driven by improvement and growth, we wanted to find about the real world challenges that need to be overcome to achieve success. We asked respondents to list their top three DCX challenges. We were keen to find out if the investment and resourcing challenges that were indicated in last year's survey were repeated. Are DCX budgets continuing to be constrained due to economic uncertainties caused by the pandemic or has more confidence returned?

The 2021 survey results indicate that budgetary concerns are reducing. The challenge around "limited budget / resources" is no longer the top challenge listed by DCX teams, reducing from 46% to 33%, a fixture which is close to the pre-pandemic level of 34% from our 2019 survey.

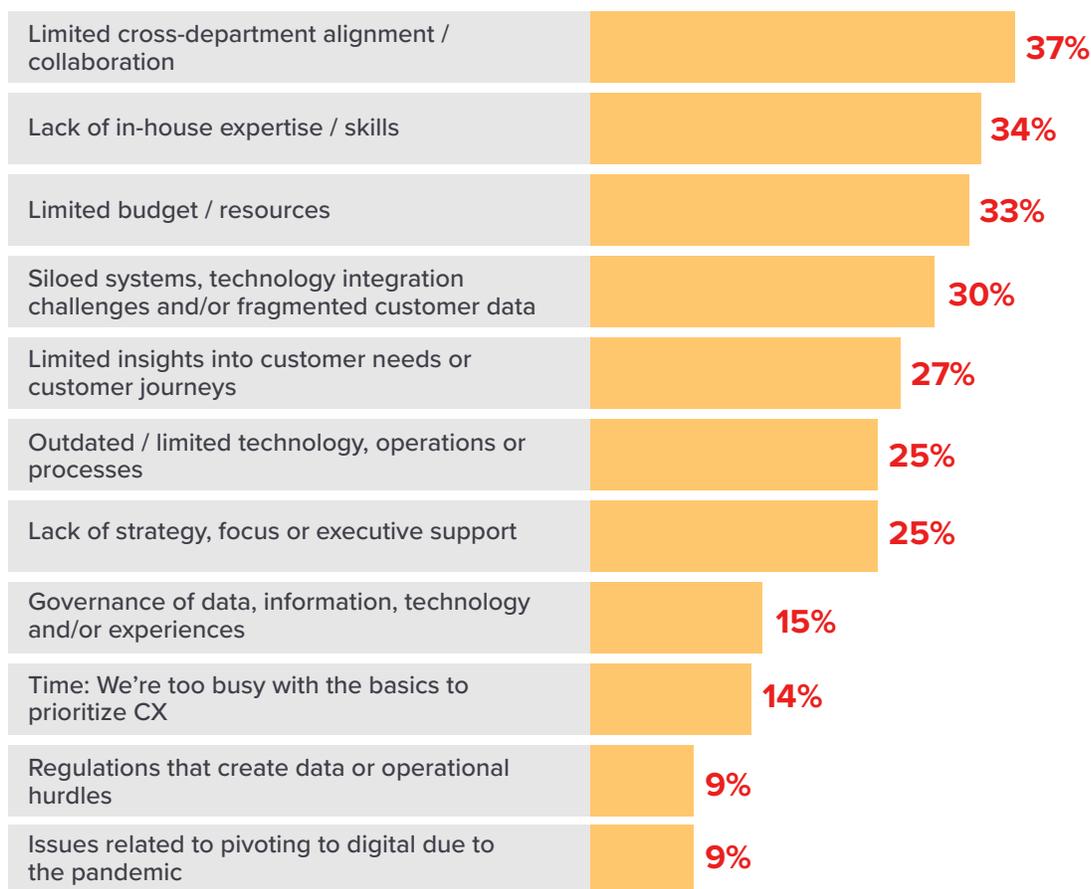
As we observed last year, smaller organizations are bearing the brunt of budgetary challenges; 41% of small organizations mentioned this as a top three challenge, compared to 28% of medium-sized organizations and 23% of larger organizations. The easing of restrictions on investment is corroborated by some of the other responses in the survey, including accelerating investment in DXP and CDP platforms.

In 2021 the top challenge experienced by organizations is “Limited cross-department alignment / collaboration” (37%), a consistent barrier to DCX success mentioned in previous years. Last year this was actually only the third most prevalent challenge and we concluded that one positive impact of the pandemic is that the crisis had resulted in a shared focus and greater cooperation between different teams. However, the resurgence of a lack of alignment suggests this new coherence may be starting to fade. Understandably, the problem is also more prevalent in larger organizations (45%), compared to medium-sized (42%) and small (30%) companies.

However, some organizations have teams that continue to work closely together and towards common goals. At HubSpot (one of the case studies featured in the report), strong working relationships have made a huge difference in driving effective DCX. Allison Tinnius, who runs HubSpot’s Voice of the Prospect program, comments that excellent cross-functional working and a shared customer-first mindset across a VoC program team, a CX measurement team, a UX team and HubSpot’s leadership has “been key to our ability to adapt to customers and their needs so quickly.”

Another noticeable trend this year is a growth in the percentage of organizations declaring “Lack of in-house expertise / skills” as one of their top three challenges. This has risen from 27% in 2020 to 34% in 2021, and from the fifth most popular answer to the second. This may indicate that teams are trying to deliver more ambitious digital customer experiences, but are being held back by not having access to the specialist skills required to pull it off. Here, smaller companies (40%) are more likely to record this as an issue than larger organizations (27%). This may also be down to difficulties in recruiting for roles that are being experienced across multiple industries.

What are your organization's top 3 digital customer experience challenges?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

The Overall Long-Term Impact of COVID-19 Is Less Than Expected for DCX teams

The COVID-19 pandemic has had a dramatic impact on how we work and how we interact with each other. We wanted to get a sense of just how profound the changes for DCX teams had been since the early days of the pandemic, and which aspects of DCX had been most impacted.

Overall, the results surprised us a little. Respondents could select all the areas where they felt they had experienced “significant change,” but the

highest answer received only 33% (“Our customer buying habits”) with the next most popular answers — “Our internal CX staff” and “Our CX strategy” — both on 26%. Given the overall impact of COVID-19 on our working lives and retail experiences, we expected the response levels to be higher.

This reason for less significant change than might be expected may be down to two main reasons. It may reflect a feeling of some kind of normality returning, particularly where lockdown conditions have been lifted. It may also be that because DCX teams were already operating with a digital-first strategy and mindset, meaning that the channels in operation, management practices, strategy and ways of working within the team were already in motion before the pandemic started.

While we would not expect anyone to not quite feel it’s business-as-usual, it points to the emphasis on DCX and digital maturity already in place before March 2020.

Individual DCX Teams Report a New Focus On DCX and Changes in Working Patterns

To supplement these answers we also asked respondents to comment on how the pandemic had changed the DCX team. Here a range of different themes emerged and the individual responses received show that different organizations have been impacted to different degrees.

For some the impact of coronavirus has been profound, while others reported there has been “no impact at all.” Some organizations had experienced difficulties in the market, reporting that “clients are disengaging due to heightened uncertainty”; but for others there had been more opportunities, where the pandemic had “created an influx of clients.” Some respondents reported reduced budgets, while others increased investment.

A pivot to digital customer experience and digital channels was a common observation. A very typical comment was: “With the loss of face-to-face selling, we had to rely more on digital to gain interest and grow revenue.”

Some commented on the corresponding change they saw with customers, who were now “much more willing to embrace online marketing and selling.”

Across different organizations, this new emphasis on DCX triggered everything from technology investment to a new mindset.

To meet a ramped up digital presence, different teams told us they invested in new channels, enhanced analytics and an entire new platform, creating new enablement in the DCX space. One respondent told us “We tied our digital stacks together and included more analytics around key touch-points. We now have the ability to change things on our digital platforms more efficiently and can measure the effectiveness of those changes immediately.” Another told us they had chosen to invest in AI to help drive customer self-service, while another organization had extended marketing automation.

It was also interesting to hear how the pivot to DCX had on the mindset of teams and leaders. One respondent told us there was now “widespread acceptance by management of CX as a strategic process” while another said “digital experience has become a higher priority.” Within the team, specific priorities had also changed, for example one respondent telling us that “Prioritizing ease of use for customers has increased.”

Some respondents also invested in new team members. One person told us “We didn't have a team dedicated to this and now we have one person. Slowly getting there!” While another said “We don't currently have a CX organization and plan to focus on this moving forward.” One organization brought in a leader to build up a digital presence from the ground up.

At the same time, some teams reported being heavily disrupted, particularly from the earlier round of redundancies experienced during the pandemic. The fallout from losing trusted and experienced team members as well as the reduced headcount made this an extremely difficult time.

There have also been some challenges in the speed of the changes. One customer told us “We were just building the brand and set on a steady momentum in growth, development and awareness when the pandemic happened. Much of our resources and marketing strategies were shelved. It took some time to revise our strategy and so we are now beginning to establish customer retention but not nearly as much as we'd like.”



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

The Hybrid Workplace Is Here To Stay

The “return” to the office is currently a trending topic. With highly variable progress on vaccination programs and the emergence of more transmissible variants of the virus, there is still uncertainty about returning to physical workplaces. We asked respondents about where the CX team will work for the rest of 2021 and got a clear message that the hybrid workplace is currently the dominant working pattern.

While 25% of organizations plan to stay fully remote, 58% will be operating a hybrid model. The larger the organization the more likely they are to go hybrid; larger organizations (69%) were more likely to be committed to a hybrid model, compared to medium-sized organizations (62%) and smaller organizations (49%).

Perhaps the most striking statistic in the response, is that only 9% of DCX teams will be fully returning to the office. For the time being, remote working or partially remote working is here to stay.

In the comments, many teams reported the switch to remote working had created logistical challenges. Here different CX teams were less prepared than others, One told us the pandemic had meant they were “finally realizing how behind we are in communicating between departments.” However, some told us it had increased productivity. One respondent told us it had triggered a permanent change. “Prior to the pandemic many were told they could not be remote employees; however, 97% of our staff worldwide are now remote with many becoming permanently remote.”

How will your CX team work for the rest of 2021?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Investing in Technology and Tools

Great digital customer experience is about content, creativity and design. But it's also about technology. Investing in the right tools and platforms is essential for successful DCX delivery. Teams rely on an increasingly sophisticated marketing technology stack to drive experiences, provide underlying analytics, and set up intelligent automation.

We wanted to find out how DCX professionals view the technology they use on a daily basis. What is in their martech stack? How confident are they in the tools they have at their fingertips? And what investments are they planning to make?

DCX Teams' Confidence in Tools Has Risen Significantly

Each year we ask DCX teams to rate the general effectiveness of their current DCX platform and tools. For the first time we've seen a significant shift in sentiment, with far more confidence in the tools than ever before. This year 21% of respondents told us that their tools were “working well,” an increase from last year's 11%. Meanwhile the proportion of respondents telling us they considered their tools “satisfactory” has grown from 47% to 52% and those telling us their tools “need work” has reduced from 42% to 27%. Unsurprisingly the proportion of respondents telling us tools were “working well” was slightly higher in our technology vendor population (26%), some of whom leverage their own solutions.

These figures represent a significant and welcome change in an area where for years teams have consistently painted a gloomy picture of the effectiveness of their tools. Within two years, the proportion of teams telling us their martech stack “needs work” has almost halved from 50% in 2019 to today's 27%.

The reason for this shift in the perception of tools is likely to be down to a variety of factors. The increased emphasis on digital experiences during the pandemic may have meant a greater reliance on tools that could have resulted in a change in perception.

It also might be that the evolution of tools is going in the right direction, with AI and automation continuing to become an effective everyday feature of the marketing tools rather than an aspirational feature for the future. It also may be partly due to the highly competitive nature of the sector which is forcing investment in digital experience platforms. Leading DXPs, for example, continue to invest in their platforms. Whatever the reason, more effective tools are good news for everybody.

Throughout the survey, we regularly compare the responses of those teams who have declared their tools to be “working well” with those that are not, giving us a fascinating indication of the factors that impact effective DCX. Here a picture of a group of more digitally mature DCX teams emerges; they have more effective tools, are more likely to regard DCX as a top priority, have a better understanding of their customers, are further ahead with personalization, and value elements such as employee experience more than their counterpoints who state they have less effective tools.

How would you rate the general effectiveness of your current digital CX platforms and tools?

Answer	2018	2019	2020	2021
Working well	13%	9%	11%	21%
Satisfactory	41%	42%	47%	52%
Needs work	46%	50%	42%	27%

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

The DCX Toolkit Is Diverse

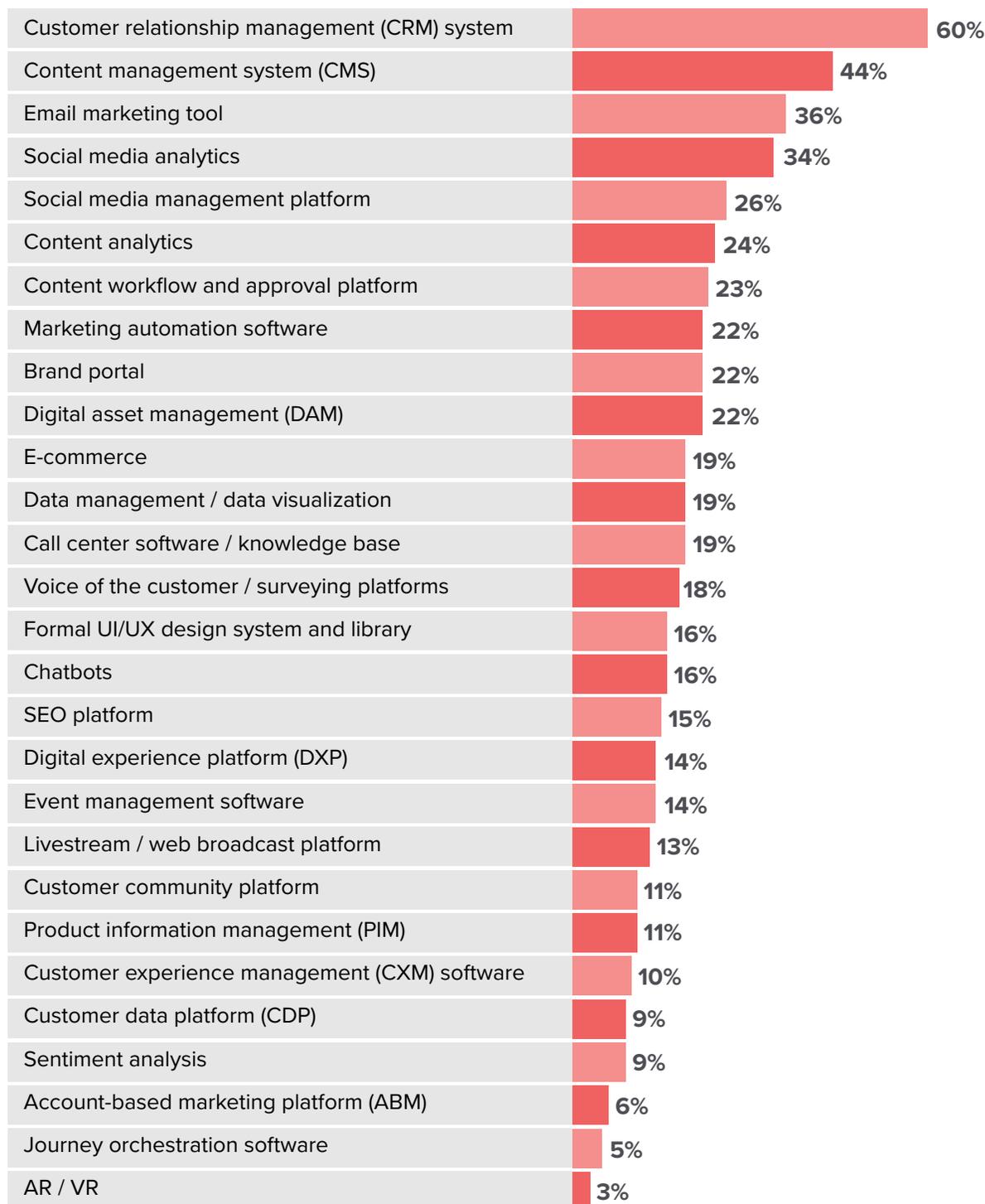
The DCX toolkit within any one organization can be highly complex, with a range of different tools making up the DCX technology ecosystem. Our survey continues to reflect this; when we asked respondents about the applications they use, we found all 29 different choices presented are in use somewhere.

Naturally the most popular tools are at the ones that are core to most digital marketing set-ups. The five most popular answers — CRM (70%), a CMS (44%), an email marketing tool (36%), social media analytics (34%) and a social media management platform (26%) — are also the five most popular tools in last year's survey.

The relative low number of organizations reporting using integrated platforms is a trend that is repeated from last year. A digital experience platform (DXP) is only the 18th most popular tool, while a customer data platform (CDP) is only listed as the 24th most popular. This response does not quite tally with other responses that suggest, for example, that 21% of organizations have a CDP in place, and there may be some ambiguity over terminology as well as the use of only selected features within one wider platform.

DCX

Which of the following tools / apps do you use within your customer experience ecosystem?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Areas for Investment Include AI, Analytics and Organizational Culture

The DCX investment priorities for 2022 and beyond are as diverse as the DCX toolset already in place, but this makes for some very interesting reading.

This year's most popular answer was a surprise; "Organizational culture and / or structure" (35%) was only the eleventh most popular answer last year. Investing in culture and structure may be in response to a desire to build up the internal culture and cohesion of teams, some of whom are starting to return to the office for the first time since March 2020. A popular perception is that organizational culture has eroded during extended remote working, and many leaders are wanting to reverse this trend.

Unsurprisingly, this is more of a priority area for larger organizations (47%) that are likely to already have culture initiatives in this area, compared to medium-sized organizations (33%) and small organizations (29%). Investing in culture was also the most popular area for investment across technology vendors too. This is also even more likely to be a priority for teams that have declared tools "working well," with 50% choosing to invest in this space, compared to an average of 31% for other organizations.

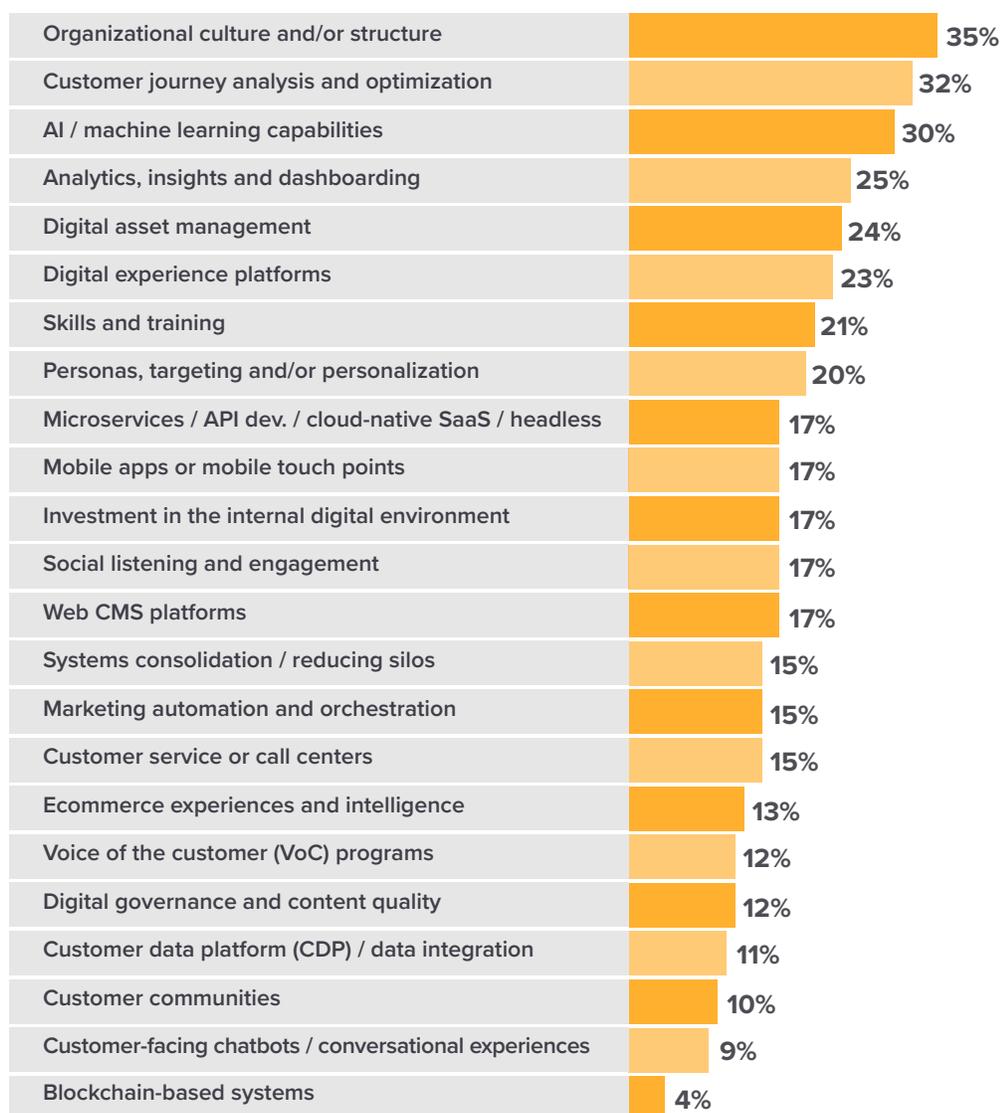
Better understanding customers with a view to improvement is an ongoing challenge, and continues to be a priority area for investment. The second most popular answer "Customer journey analysis and optimization" (32%) and fourth most popular "Analysis, insights and dashboarding" (25%) were respectively the second and first most popular answers last year.

There is also a significant growth in interest in leveraging AI and machine learning capabilities. This was the third most popular answer (30%), climbing from being one of the least popular answers last year.

Why has there been such a surge in active investment in AI? It may represent a growing belief that AI makes a real difference, as it becomes part of everyday life, and maturing products take up a more prominent presence in the DCX toolbox.

Some of this new focus on AI investment may be down to positive experiences with products that feature AI. Here, those organizations with tools “working well” are leading the way, with 37% identifying this as an investment area compared to those with tools rated as “satisfactory” (29%) or “needing work” (26%). The larger the organization, the more likely investment in AI too — 46% of larger organizations are looking to invest, compared to 33% of medium-sized organizations and 17% of small companies.

What are your organization’s current digital customer experience investment priorities?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Marketing Functions and Leaders Still Control DCX Budgets

Although COVID-19 has led to many changes, it has not significantly impacted the investment control over DCX technology that is maintained by marketing and related customer experience teams (24%) as well as from executive leadership functions (21%). However, in some organizations IT (16%) remains in control of the DCX tech budget.

Which department in your organization is the primary decision-maker for digital customer experience technology investments?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Investment in Digital Customer Experience Is Accelerating

Earlier in this report we noted that the constraints placed on budgets during the pandemic seem to be starting to loosen. This more optimistic view on spending plans is confirmed by responses to questions about the investment in digital experience platforms (DXPs) and customer data platforms (CDPs).

We asked respondents whether they were planning to invest in a web CMS or DXP platform. Those telling us that they planned to build their own system have increased year-over-year from 5% to 13%, while those buying a new platform have risen from 6% to 12%. Meanwhile the proportion of respondents intending to carry on with their existing platform has reduced from 29% to 17%.

There are also indications that more are considering investing in a CDP too. The proportion of those organizations who have actually purchased one is slightly up from 19% to 21%, and the number of those actually planning to acquire one has grown from 6% to 12%. The number of organizations with no plans for CDP investment has reduced from 20% to 14%. Here, a CDP is more likely to be already owned by a large organization (29%) compared to a medium-sized (19%) or small company (18%).

The increases in those numbers with an intention to invest are perhaps modest, but it shows that there are green shots of investment with teams who want to keep digital customer experience moving. Our survey indicates that these buying intentions are occurring across all organizations — patterns relating to investing in a CMS or DXP were relatively consistent across different organizational sizes.

Is your organization planning to invest in your web CMS/digital experience platform in the next 12 months?

Answer	2020	2021
Yes, we are building our own system	5%	13%
Yes, we are buying a new platform	6%	12%
Yes, we are upgrading or enhancing an existing platform	15%	18%
Possibly, we are evaluating the situation	27%	29%
No, we are continuing with our current platform for the time being	29%	17%
I'm not sure	18%	11%

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Does your organization presently own or are you planning to invest in a CDP or customer data management solution?

Answer	2020	2021
Yes, we have already purchased one	19%	21%
No, but we are evaluating CDPs now	11%	19%
No, but it's a topic of discussion	22%	29%
No, and we have no current plans	20%	14%
I'm not sure	28%*	17%

*includes Don't Know responses

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Improving Customer Experience Measurement and Analytics

High-performing DCX teams and digital marketing professionals exhibit an improvement mindset, actively using a range of measures and analytics to drive more impactful experiences, resulting in increased brand awareness, customer loyalty and ultimately more sales. Taking a data-driven approach to DCX is a given, but often practices around using numbers are not as advanced as they could be; last year we reflected that approaches to measurement are “surprisingly immature and even nascent in some organizations.”

This year we again asked about the types of metrics being used, helping us to ascertain whether the pandemic had changed measurement practices.

DCX Measurement Focuses on Classic Analytics and Less on Short-Term Indicators

This year’s responses show some changes in the use of metrics in the past year as the pandemic has played out, while other types of metrics have remained steady in their use. The top three most popular metrics — customer satisfaction (CSAT) (37%), customer retention rate (32%) and net promoter score (NPS) (30%) — were almost identical to their rates of use from last year, and represent “classic” metrics that continue to deliver value. Here, larger organizations are more likely to use the CSAT and NPS scores.

These measures remain resolutely popular across DCX teams. When asked which individual metric has the most value to them, both the CSAT and NPS scores feature in the top three most popular answers. Teams clearly feel these numbers are useful in supporting improvement efforts.

There has also been a growth in the use of metrics which reflect the real value of deeper, long-term relationships. Over the past two years, the customer lifetime value (CLV) metric has continued to become more popular, rising from 17% in 2019, to 22% in 2020 and now to 27% in 2021. This is also singled out as the second most valuable individual metric by respondents.

There is also some indication that teams need to have the right technology in place to be able to measure CLV accurately, a task which is not always necessarily straightforward; here respondents with tools “working well” were more likely to measure CLV (43%) compared to those with less effective tools (23%). However, smaller organizations were also more likely to use the CLV score -- 34% compared to 22% of medium-sized organizations and 26% of larger organizations.

At the same time, there is some indication of there being generally less emphasis on metrics that provide shorter-term indicators of success. For example, “Site or app use” as a metric has declined in use over two years, being used by 24% of organizations in 2019, to 17% in 2020, and further 11% in 2021.

Last year the most popular metric used by organizations was “Bookings, renewals, revenue and/or growth” (39%). It was also singled out as having the most value. In 2021 this metric declined in popularity, only used by 23% of organizations and now the seventh most popular metric. The popularity last year may have reflected an urgent focus on acquiring revenue to survive the early days of the pandemic; the decline in popularity now may indicate a return to a more medium-term and longer-term focus beyond the immediate need for survival.

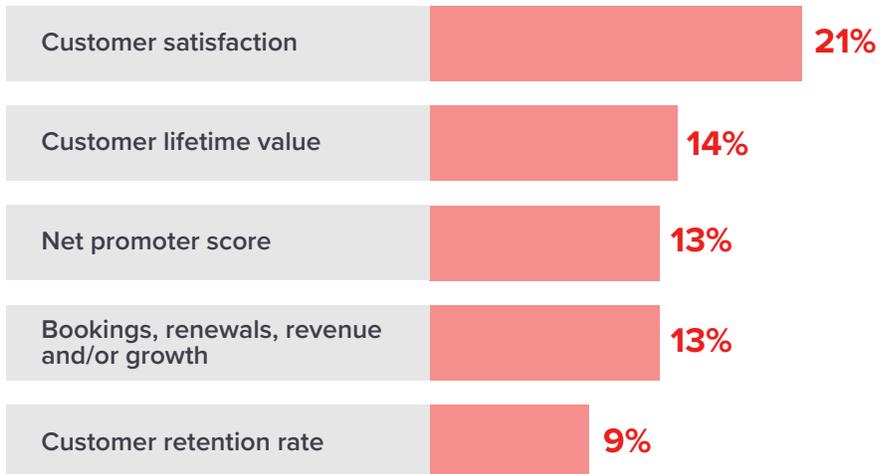
One overall positive trend from 2021 responses is a modest reduction in the number of organizations who do not measure or are uncertain, declaring that they “Don’t know.” Overall last year these groups collectively accounted for 21% of all organizations, but this year the figure has reduced to 14%, with around half declaring they specifically do not measure.

What metrics does your organization use to measure digital CX improvement?

Answer	2020	2021
Customer satisfaction	36%	37%
Customer retention rate	32%	32%
Net promoter score	32%	30%
Customer lifetime value	22%	27%
Customer acquisition rate	28%	26%
Engagement metrics	32%	23%
Bookings, renewals, revenue and/or growth	39%	23%
Customer effort score	10%	15%
Reduced customer service calls / load	18%	13%
Custom VoC metrics	16%	12%
Site or app use (MAU, uniques, pageviews, etc.)	17%	11%
Call center load reductions	17%	9%
Cart abandonment rate	11%	7%
We are not currently using any metrics	10%	7%
I don't know / I'm not sure	11%	7%

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Of the metrics you chose above, which is the most useful for your organization? (top five answers)



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Understanding and Targeting Customers

Successful digital customer experience is based on a thorough understanding of customers. Knowing how your customer segments think and how that translates into online behavior enables teams to improve customer experiences through content, design and personalization. In turn this impacts retention, brand loyalty and sales. Understanding and targeting customers matters.

We wanted to find out more about how companies are approaching understanding and targeting customers and prospects, as well as some of the associated challenges — for example around data privacy — that can make the task consistently challenging.

Understanding Customers Must Improve, but Technology Is Making a Difference

Better understanding customers and their digital behavior remains a major area where teams see room for improvement. Only 18% believe they understand their customers “well,” and although a majority feel they have a moderate understanding of customers (52%), this is still a long way to go. Although these figures are underwhelming, there is some cause for optimism as the 18% who understand customers “well” has grown from 11% in 2020.

Digging into the data shows that larger organizations tend to have the edge in understanding customers, with 24% knowing them “well” compared to medium-sized organizations and smaller companies (both 15%). Technology vendors also felt they had a slightly better understanding of customers with 21% knowing them “well,” compared to 18% among non-vendor organizations.

One noticeable trend is that having more effective technology and tools in place is supporting a better understanding of customers. Organizations declaring tools “working well” were far more likely to declare they understood customers “well” too (47%), compared to only 14% of those with “satisfactory” tools and 4% of those with tools needing work. Here the tools appear to be delivering; DCX teams are equating platform effectiveness with one that enhances knowledge about customers and their behavior.

How well do you think your organization currently understands its customer’s digital behavior?

Answer	2020	2021
Well. Tools are in place to gain understanding and take action on those insights.	11%	18%
Moderately. Tools are in place to gain understanding, but limited actions have been taken.	56%	52%
Poorly. Some tools are in place but not yielding a good understanding of behavior.	27%	23%
Not yet started. We’re just starting work in this area.	6%	7%

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Gaps in Understanding Vary; Most DCX Teams Have an Idea of What They Wish They Knew

In order to find out about the specific gaps in understanding that DCX teams face, we asked respondents “What is the most important thing you’d like to know about your digital customers but currently don’t?” As answers were provided as open comments, responses cover a number of themes, including:

- Understanding buying behavior when online, including when and why they don't make a purchase
- Customer attitudes about competitors, and how they compare to the respondent’s organization

- Content and information needs, and the related effectiveness of content and campaigns
- Customer budget and spending potential
- More complete information about customer journeys, including site referrals and outward destinations
- Levels of customer satisfaction relating to products, services and the general online experience
- Wider demographic and industry trends that impact customer actions
- Gaining specific feedback from customers, including about pain points
- Specific information about email marketing, for example whether emails are being received and read
- Customer's future trends and plans
- Identifying specific information about customers including age, gender and if they are repeat visitors
- Underlying beliefs, motivation and mindset of customers
- Specific online behavior once on site or in an app
- Characteristics with a view to segmenting customers and /or building personas.

While touching upon a whole range of themes, individual responses range from being quite generic (“mindset,” “customer behavior”) to pinpointing very specific details, some particular to different products and services. Overall two things struck us:

- In general teams have a definite understanding of where their gaps in understanding are, and the value that the missing information would bring

- For most of these areas, there are tools and approaches available that can support different areas of understanding.

Personalization Is Picking up Speed, Indicating a Growth in Maturity

It seems personalization is often more talked about than actually implemented, and despite its promise, maturity remains surprisingly low. Only 20% of organizations are actually deriving benefits. However, following on from last year when we observed that personalization was beginning to become more prevalent, this year's responses confirm that personalization is picking up speed. The proportion of organizations deriving benefits has more than doubled in two years, from 9% in 2019 to 20% today. The proportion of those actively "conducting limited experiments" has also edged up from 29% to 31%. Collectively this means that for the very first time the majority of organizations (51%) have some kind of personalization in place.

CBC (featured in our case studies) is an example of an organization that plans to ramp up their personalization efforts. In the past they have been reticent about advancing personalization due to data privacy concerns particularly as a national public broadcaster, but this year they are actively planning an expanded membership offering that will deliver a more personalized experience for those that sign up.

Organizations with effective tools are far more likely to have implemented personalization. 40% of those with tools "working well" are already enjoying benefits from personalization, compared to just 18% with tools that are rated "satisfactory," and 10% those with tools "needing work." Like last year, this suggests that personalization is adopted by those organizations who are further along the DCX maturity curve and have adopted the tools and practices to implement it successfully.

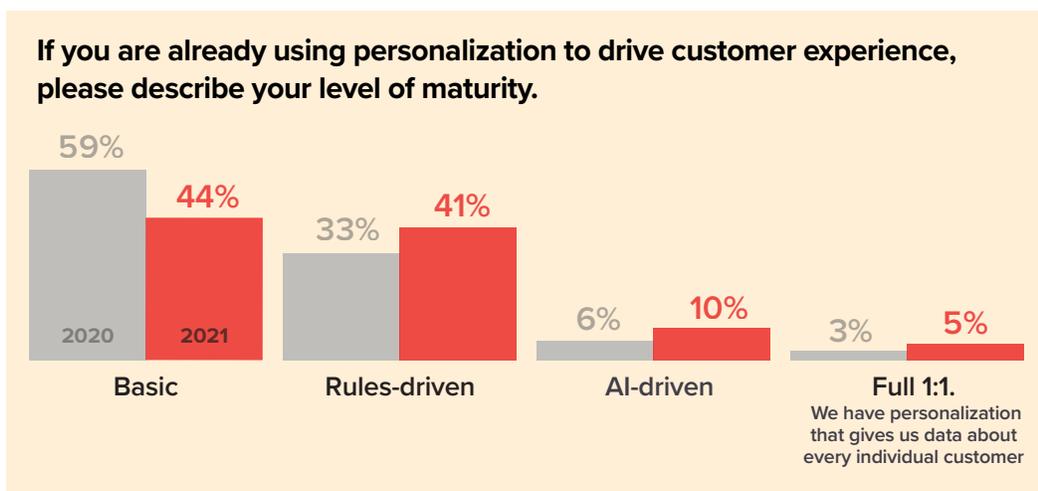
How would you describe your organization's use of personalization for digital customer experience?

Answer	2020	2021
We are already deriving benefits after implementing personalization	16%	20%
We are conducting limited experiments with personalization	29%	31%
We are actively evaluating personalization and have a budget in place	13%	19%
We are considering an evaluation of personalization but have no budget in place	21%	18%
We have yet to invest. Personalization is not currently a priority for us.	21%	11%

SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

We also asked DCX professionals that had personalization in place to rate their level of maturity. Responses indicate a significant growth in maturity with those rating their efforts “Basic” declining from 59% to 44%. Every other area (Rules-driven, AI-driven and full 1:1) has increased in the previous year.

We expect the level of personalization to continue rising into 2022, with automated facilities for personalization starting to open up the market and increase maturity further.



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

A Culture of Data Privacy Is Growing Across Digital Customer Experience Teams

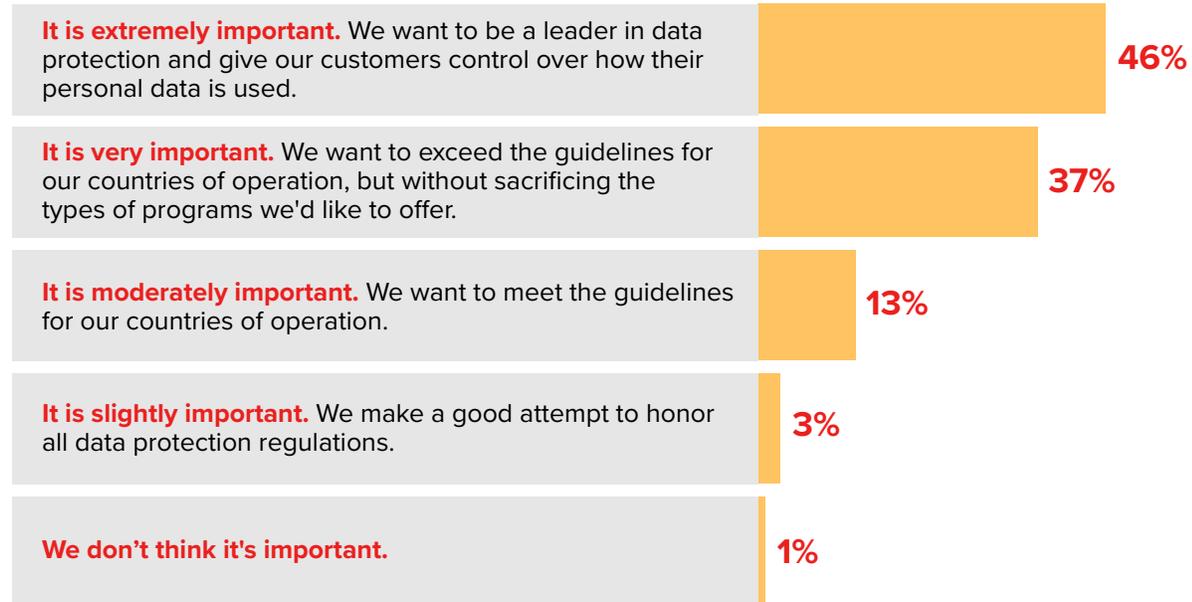
Last year we observed how the EU's General Data Privacy Regulation (GDPR) and other acts like the California Consumer Privacy Act (CCPA) meant that data protection had become ingrained into the mindset and actions of digital marketing teams. Responses to the survey in 2021 show that a culture of data protection continues to grow across DCX teams.

Nearly half of all organizations (46%) declared that data privacy is “extremely important” and expressed a desire to be a leader in this area. A further 37% told us they felt it was “very important” and wanted to exceed the guidelines for their countries of operation.

These response levels indicate a sea change from the days when teams might only be interested in doing what was absolutely necessary within regulations. Instead data protection and privacy is being regarded as a brand asset and even a lever for differentiation. An interesting side note here is that organizations with tools that are “working well” were more likely to declare data privacy to be “extremely important” (61%) compared to those with satisfactory tools (41%).

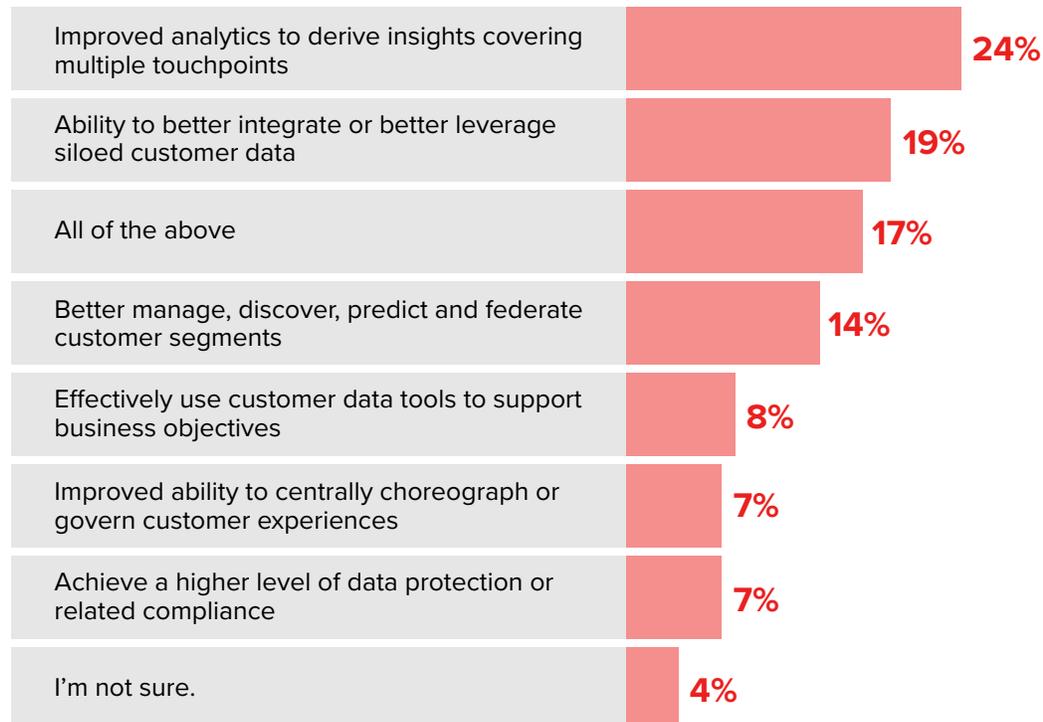
We also wanted to find out about the priority use for customer data. Unsurprisingly here the emphasis is firmly on better understanding customers with the top answers including delivering insights through “improved analytics” (24%) as well as “integrating and better leveraging siloed customer data” (19%). Meanwhile 14% of respondents want to “Better manage, discover, predict and federate customer segments.”

What is your organization's attitude toward data protection?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

What is your highest customer data management priority?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Making the Difference

Making the Difference

There are a variety of different factors which are positively impacting digital customer experience. Artificial intelligence (AI) is moving on from its futuristic roots to be considered an everyday product feature that can contribute to DCX success. There is also a growing body of research and a swathe of anecdotal evidence to suggest the positive impact good digital employee experience (EX) has on customer experience, particularly in high-touch sectors.

We wanted to explore further how DCX professionals viewed the impact of both AI and EX, and also the attitudes of vendors who design and sell the products that DCX teams rely upon.

Confidence in AI Is Growing as It Becomes an Everyday Product Feature

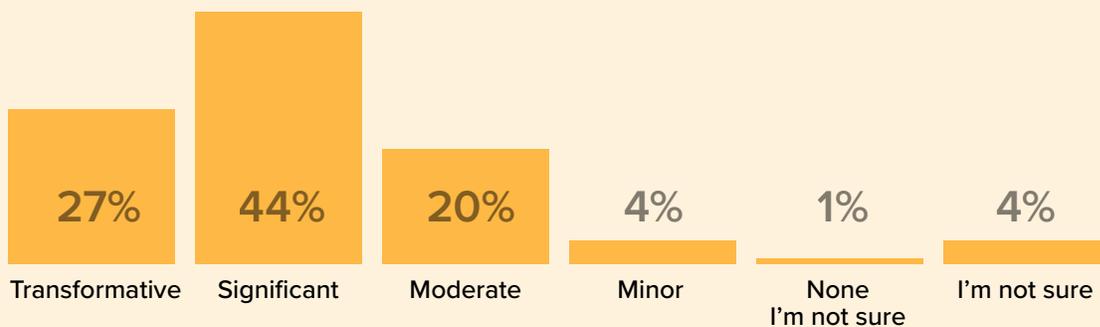
The media hype about AI and machine learning has sometimes clouded the debate about its positive impact, but this year there appears to be growing confidence in the impact of AI. The proportion of respondents telling us that the impact of AI on the DCX space over the next two to five years will be “transformative” increased from 18% to 27%. The growing number of teams who believe in the power of AI aligns with other responses that show a significant leap in AI as a priority area for investment.

The real world experience of AI is likely to have an influence on attitudes towards it. Those who rate their tools “working well” and who indeed may already be finding benefits were more likely to rate AI as “transformative” (39%) compared to those with “satisfactory” tools (22%).

However, the overall proportion of respondents who believe the impact will be either “transformative” or “significant” remains relatively static — 71% this year compared to 72% last year.

This means that the proportion of respondents who are more skeptical and believe the impact will be less than significant has remained more or less unchanged from last year. This represents just under a third of respondents (29%) at odds with the majority view, and suggests there is still residual wariness of vendor claims and perhaps experiences with using AI that haven’t quite lived up to expectations. Interestingly when we do compare responses from software vendors there is greater confidence in the power of AI, with 35% declaring it “transformative” compared to 27%.

What impact do you expect artificial intelligence and machine learning to have on digital customer experience over the next 2-5 years?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

We were also interested in where teams believe the most significant impact will be. Here the top two answers “Gaining actionable customer insights” and “Enabling customer self-service” are the same as last year.

Where do you expect artificial intelligence and machine learning will have the most impact on your organization's customer experience?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Teams Experience the Positive Link Between DCX and EX

We also wanted to investigate the positive correlation between digital customer experience and digital employee experience and whether they are two sides of the same coin. Investing in the right collaboration and communication tools in the digital workplace can help align and coordinate the activities of DCX teams, while the commitment to usability and user experience can drive a people-first organizational culture that benefits both employees and customers. There is also an argument that customer-facing employees who are happier and more informed are also likely to respond positively when interacting with customers, both in-person and online.

Just like last year, around three quarters of respondents view digital employee experience as being “very important” or “moderately important” for DCX, but this rises significantly to 91% for respondents with tools “working well.” Moreover, the overall proportion of those regarding

employee experience as “very important” has grown from 28% to 37%. It is possible that this rise is an impact of the pandemic, where more employees have worked remotely and had to rely on tools like Microsoft Teams or Slack to deliver customer experience, and also work more closely with their co-workers in other functions.

We also asked about where employee experience has had the most impact. Here, unsurprisingly “collaboration tools / allowing us to be agile and responsive” remains the most popular answer (as with last year), reflecting our collective reliance on tools like Teams, Slack and Zoom under lockdown conditions, and supporting the ability to be aligned with other teams.

The importance of having the right information about customers to seize opportunities, target experiences and understand their behavior is also reflected in the second most popular answer “Easy access to information on customers.” Our case studies reflect this emphasis, for example with the VoC team at HubSpot gaining enormous value by being able to leverage insights about customers from a new analytics team.

How important is the digital experience your employees have with internal applications in affecting the quality of your external digital customer experiences?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Within your organization, where do you see employee experience having a significant direct impact on your customers's experiences?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Deepening Customer Relationships at CBC Through Membership

About CBC

CBC is Canada's English language, publicly funded national broadcaster. As a public sector broadcaster, CBC's view of customer experience is driven by its mandate to keep Canadians informed, enlightened and entertained. Kate Stewart is the Product Manager for "Audience Acquisition & Engagement," responsible for email newsletters and CBC's presence on various third-party platforms. Her team is also currently leading a new digital membership initiative.

In last year's State of Digital Customer Experience report we heard from Kate Stewart about how the pandemic had driven a more responsive approach to the needs of its audience, as well as various existing initiatives to better understand customers. This year she updates us on a new project that will further deepen customer relationships and provide a more personalized and joined-up digital customer experience.

The Impact of the Pandemic

Last year we heard how the pandemic had impacted CBC across several fronts, including creating a new interactive format branded as the "Ask CBC" service where the public can ask questions relating to COVID-19 and other topics in the News and get authoritative answers. Here a dedicated team then identifies trends raised by the questions to determine programming content and opportunities to feature the public in reporting. This more interactive and responsive approach is continuing to influence CBC's touchpoints with its audience.

Stewart explains "The pandemic has influenced how we interact with our audience. I think we are shifting from a mode of telling our audi-



KATE STEWART,
Product Manager,
Audience Acquisition
& Engagement, CBC



ence what the biggest stories are, to trying to listen more, and to report back to our audience on what's important to them. The Ask CBC program has continued to stand out this year and I expect it will grow in all sorts of ways going forward.”

One way to drive more listening is to enhance digital channels that support closer relationships and more interaction between CBC and its audience. Stewart comments “We’re really looking at ways of expanding the way that people can submit questions. We’re potentially tying it to membership which is something my team is looking into right now. It’s still quite new in terms of a concept for CBC and we’re still in an exploratory mode.”

The Power of Membership

Membership is a password protected digital environment where CBC’s audience can find a more personalized experience. Kate Stewart explains “For now our membership offering within our news and streaming audio services is pretty light. If you’re signed in as an authenticated user, you have more access to additional content and features on CBC Gem, our over-the-top (OTT) video platform. You can also participate in the comments section of our website and manage your newsletter subscriptions in a central place. Ultimately we want to expand it and deepen the relationship between CBC and every individual user. Membership is a mechanism that we believe can help.”

An Overarching Digital Customer Experience

Another aim of membership is to create a more consistent and less fragmented digital experience of CBC services. Stewart explains “We currently have CBC Gem providing streaming video across web, mobile and Connected TV platforms, a website and an app for our CBC Listen audio service, our main cbc.ca website, and apps for News and Sports content. We hope that membership will bring these disparate services together in a way that is going to make sense for the audience.”

To make this happen, Stewart concedes that “there is a lot of work behind the scenes” for example ensuring that when you sign into one service, you can access other services too. Stewart notes that audiences have become accustomed to logging into the media services they subscribe to, and expect a personalized view of the media they consume.

Stewart comments “People are used to signing into Google, Amazon and Facebook, so being in an authenticated state across all of the digital services that you deal with is becoming quite common. Our membership has to fit within our public service mandate. We will be transparent about data collection and very clear about what the value exchange is for the audience, including what we do with their data.”

To fully enable and then scale membership, but also deliver on CBC’s strong commitment to privacy and transparency, the teams are currently considering their options around storing customer data.

Understanding Customers Through Analytics

Another area where membership can add value for CBC is to help understand behavior, particularly across different channels. Kate Stewart explains “We already know, for example, that our newsletter subscribers are six times more likely to participate in the website comment section than regular website visitors. We have an understanding that they are more engaged with CBC and likely to be more loyal. At the moment our analytics setup is necessarily complex and distributed. Membership will allow us to better understand customer behavior across different channels and gain real insights, meaning we can build deeper relationships with our audience.” *Aggregating and Making Sense of Analytics*

Over the past two years the VoC program has also worked to improve customer reporting and measurement. Previously a new quarterly aggregated report covering a range of analytics had been created, but HubSpot has now formed a brand-new team to take customer measurement to the next level.

Deepening the Customer-First Culture at HubSpot

About HubSpot

HubSpot produces marketing, sales and service software that helps businesses grow. Headquartered in Cambridge, MA, USA, and with 2,900 employees spread across nine global locations, the company is a well-known player in the customer experience space, with a particularly strong footprint in the B2C market.

In last year's State of Digital Customer Experience report we heard about HubSpot's Voice of the Customer (VoC) program and how it has evolved, as well as the wider impact of the COVID-19 pandemic. This year we talked to Allison Tinius, Program Manager, Voice of the Prospect Program, about a new emphasis for the VoC program, approaches to measurement and how HubSpot keeps on ensuring there is a customer-first culture throughout the company.



ALLISON TINIUS,
Program Manager,
Voice of the Prospect
Program, HubSpot



The Voice of the Prospect Program

Over the past two years, the Voice of the Customer program has successfully helped to surface customer insights and ensure HubSpot remains resolutely focused on the experiences of customers. To build on this success, the company has now introduced a parallel "Voice of the Prospect (VoP)" program that sits within the wider VoC initiative.

Allison Tinius explains "There was a real appetite to extend what we've been doing in our VoC program, gathering feedback and applying that to the prospect experience. At its core we're trying to turn our prospects into happy HubSpot customers."

The program follows similar objectives to the VoC program. Tinius comments “The VoP has three main aims - aggregating and improving access to insights about the prospect experience, identifying opportunities to improve that and then amplifying the voice of the prospect throughout the company. The VoC program has been very successful in amplification, and getting insights and feedback in front of staff, all the way up to the executive team. It’s helped us really develop that ‘customer empathy muscle.’”

Currently it’s relatively early days for VoP although the program is starting to make progress and the prospect “voice” has been highlighted in staff meetings. Tinius remarks “At the moment the program still entails a lot of laying the groundwork, similar to when we started the wider VoC program. We’re working on collecting the feedback from our listening posts with our prospects right through the sales experience, as well as when we receive feature requests. We’re starting to streamline these processes and gather the feedback together.”

Aggregating and Making Sense of Analytics

Over the past two years the VoC program has also worked to improve customer reporting and measurement. Previously a new quarterly aggregated report covering a range of analytics had been created, but HubSpot has now formed a brand-new team to take customer measurement to the next level.

Allison Tinius comments “The Customer Experience Measurement team is responsible for monitoring trends and product sentiment, but also the broader customer journey. They run a relationship survey, which is looking at performance gaps, and help us work on the VoC program. Partnering with a dedicated team in understanding and analyzing the metrics is so helpful in pulling all this feedback together and turning it into valuable insights. We partner extremely closely with them.”

With the VoP program now operational, analytics also now cover the prospect experience. Tinius remarks “We ran our relational NPS survey with prospects, so we could hear about the experiences of people who were in the sales process or even where we lost the deal. We want the experience to be good whether or not you purchase HubSpot. Including prospects in the survey has allowed us to identify what we could be doing better and where we're doing well. It has shown us areas for improvement such as collecting insights and in streamlining and scaling our work.”

Involving Customers

Another successful area of the VoC program has been to ensure the customer voice is heard and understood throughout HubSpot. Previous activities have included setting up monthly calls with HubSpot's leadership team which feature customers. More recently, HubSpot organized a virtual workshop on the theme of growth. Tinius explains “Recently we amplified and grew our Customer Advisory Board. We held a growth workshop in partnership with our UX research team. The goal was to understand what growth means to our board members and what accelerates or hinders that growth.”

Live town halls involving members of the Customer Advisory Board as well as customer-focused staff meetings have also been organized. Tinius adds “We always record sessions like that and do highlight reels so as many people as possible can gain those insights. Even sessions that are behind closed doors involving our executive team - we try to ensure everyone in the company can listen in.”

Continuing to Drive Customer-Centricity

Overall, initiatives like the VoP program and the new measurement team are continuing to build a customer-first culture and mindset at HubSpot. Allison Tinius observes “I think we've been building that culture of

customer empathy for years. HubSpot has worked hard to encourage it. I joined the team in December, and I was blown away by the level of customer-centricity here.”

High levels of customer-centricity have also been reflected in customer feedback gathered during the past eighteen months. Tinius comments “We saw a lift in our metrics around customer sentiment during the pandemic. I think part of that can be attributed to being a customer-first company with a lot of empathy.” Tinius also attributes the uptick in sentiment to an influx of new customers who were experimenting with digital strategies for the first time because of the lockdown conditions. “New customers were vocal about how they appreciated HubSpot’s ease of use, an area we’ve always cared about.”

Tinius also believes a willingness to work together across different functions has enabled the company to be very responsive to both customers and prospects. “One thing I’ll say about HubSpot is that the cross functional working and the willingness for people to reach out and solve problems is fantastic. It’s been great working with the CX measurement team, our UX team and leadership. This has been key to our ability to adapt to customers and their needs so quickly.”

ABOUT THIS REPORT:

Methodology and Demographics

SMG/CMSWire conducted this survey online between July 23 and August 20, 2021 to an audience of approximately 50,000 CMSWire readers. The survey report is based on the analysis of partial or completed responses from 1,354 participants.

Please note percentages have generally been rounded up or rounded down to the nearest whole number in the report's text. Because of the rounding it can mean some total percentages add up to 99% or 101% in total.

Some of the survey questions requested multiple answers, while others required only a single response. There were some questions asking for free text responses, too. We also draw on responses from the equivalent survey from the previous three years.

The survey was open to all. For most of the survey data referred to in this report, we have filtered out 433 answers from vendors and IT providers providing marketing and customer experience software. This leaves 921 responses examined for the majority of questions. Respondents included in this group consist of people who lead customer experience in their organization, manage parts of the process, or have some kind of influence over it. The reason for this was to get a more accurate picture of the state of customer experience in organizations using customer experience software, and to ensure data was comparable with previous years. However, for some answers we have included comparisons of views between vendors and non-vendors and also examined qualitative data.

Survey participants are part of the [CMSWire Customer Experience Research Board](#), a group of business leaders who develop and manage customer experience programs. The purpose of the board is to conduct industry research on the emergence and development of customer experience technologies and best practices, and to connect customer experience professionals to relevant and timely research.

Survey participants came from a wide range of organizational sizes and sectors, as well as all levels. The breakdown of participants is indicated in the following tables.

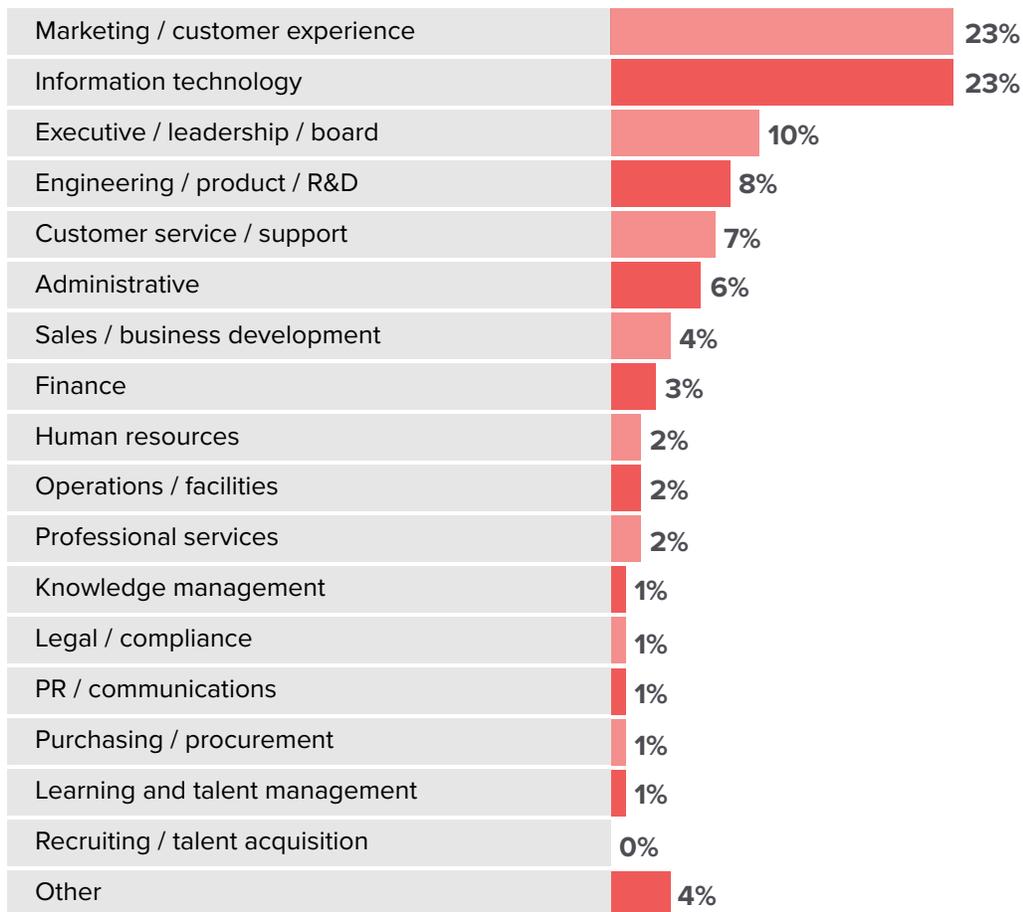
Throughout the report we also segment the data on two key elements. The first is organizational size: Small companies (under 100 employees), Mid-sized companies (100 – 5,000 employees) and Large companies (over 5,000 employees.) Rather than having to continually refer to these numbers of employees we use the terms “Small,” “Mid-sized” and “Large” throughout the report.

We also frequently segment answers based on how respondents rate the effectiveness of their tools. We refer to these groups as “working well,” “satisfactory” and “needs work” or “needing work.”



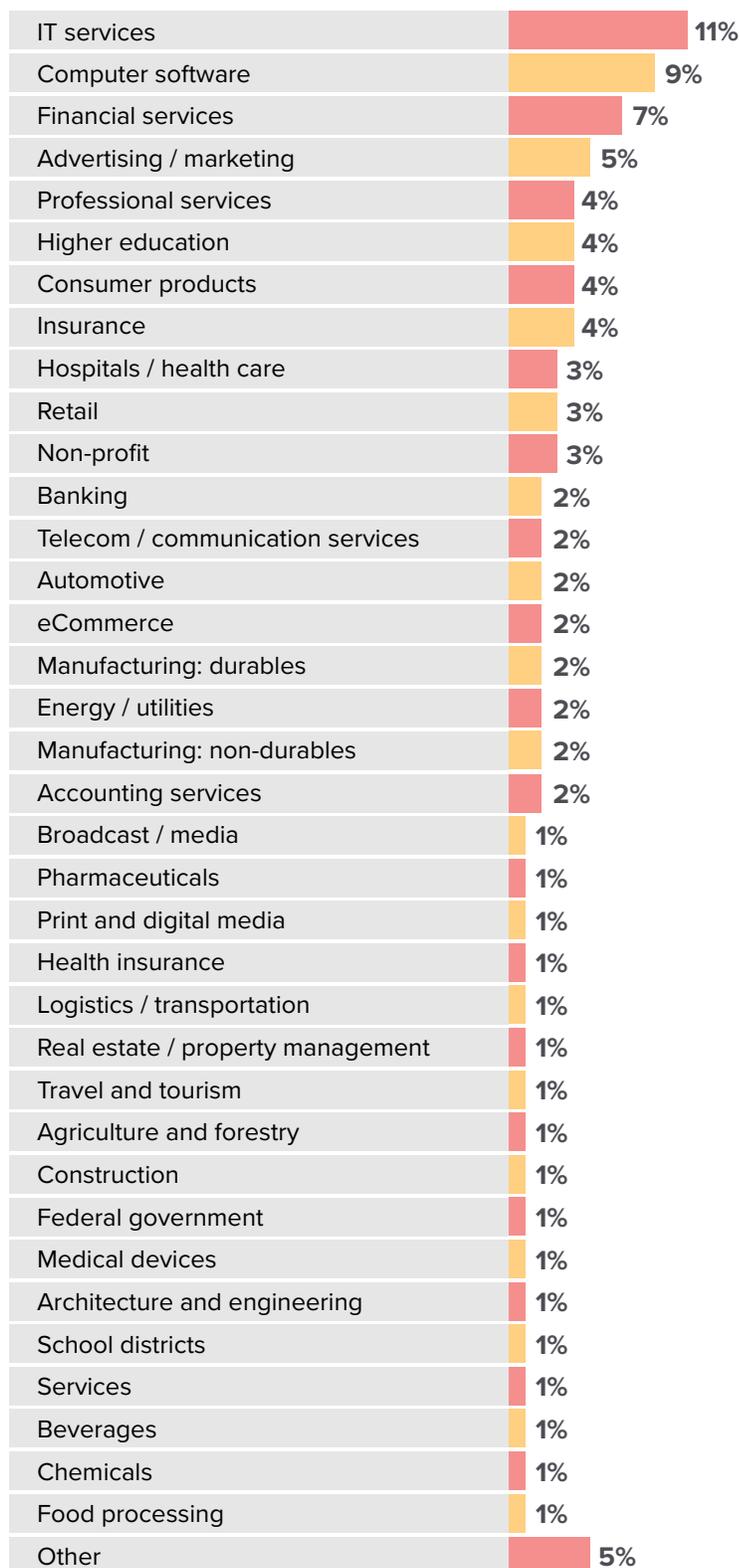
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In which department do you work?



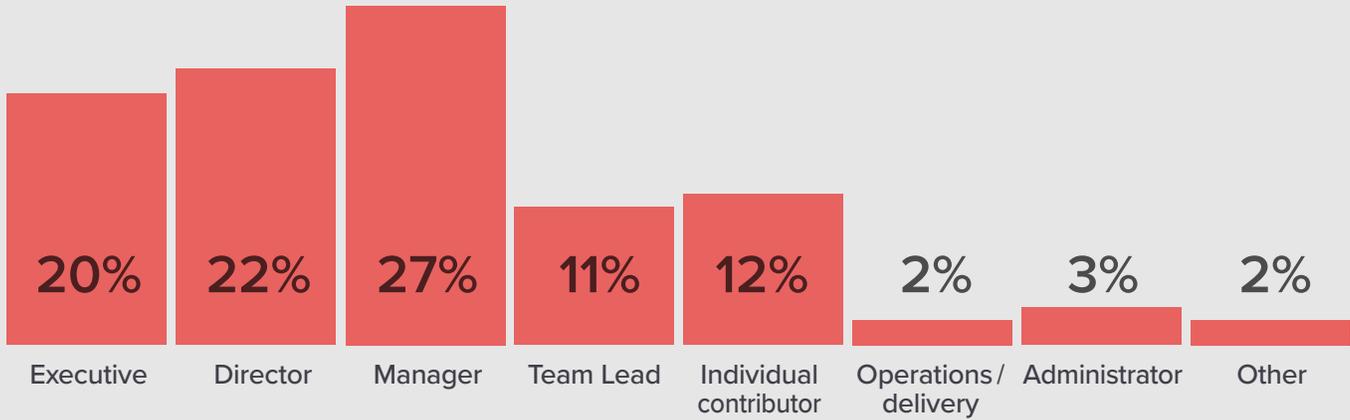
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Which of the following best describes your industry?



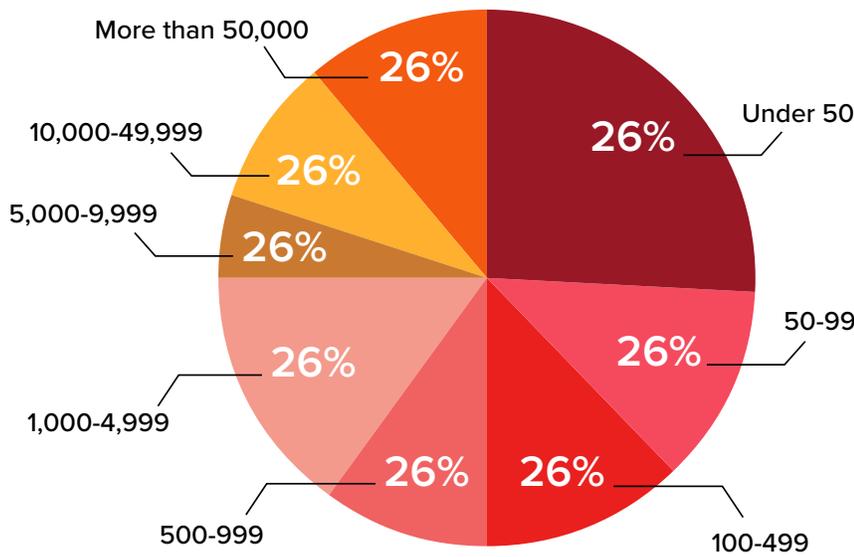
SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

Which of the following best describes your career level?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

What is the size of your organization?



SOURCE: CMSWIRE / SMG STATE OF THE DIGITAL CUSTOMER EXPERIENCE REPORT 2021 Q4

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