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Digital Divide

The discord between marketers' actions and consumers' behaviors

Investigating how the increase in data and engagement channels has changed the way consumers interact with brands, and how prepared marketers are to accommodate these shifting consumer behaviors.

Foreword

In February 2021, Upland BlueVenn commissioned OnePoll to determine how and where consumers interact with brands, and if marketers are meeting their customers' expectations. The research examines the way in which consumer-marketer interactions differ from sector to sector, and explores the top channels consumers and marketers use for various industries (and whether these align). We polled 4,000 consumers from 02.18.21 to 02.23.21 and 500 marketers from 02.18.21 to 02.25.21, all based in the US or the UK.

Research commentary

By Anthony Botibl, VP Marketing, Upland BlueVenn

In the last 12 months we have seen a huge increase in the number of consumers interacting with brands across digital channels. However, as the quantity of available channels rises correspondingly, it appears that marketers are struggling to gain a true understanding of their customers' fragmented digital footprints. It is especially difficult for multichannel brands, operating both online and offline, to keep up with increasingly complex journeys. This problem, combined with the fact that marketing teams don't have the technical skills or tech stack required to effectively analyze and segment customer data, has led to a disconnect between marketers' actions and consumers' behaviors.

The ever-evolving digital landscape means that consumers now have a plethora of channels to browse or purchase on, from email, web browser, mobile app, and social, to offline channels including in store, catalogs, call centers and direct mail. The increase in customer touchpoints, and the resulting dramatic change in consumer behavior, has accelerated the need for marketers to understand how, and where, to interact with customers.

The discord between consumers and marketers has left businesses struggling to adapt. Many have resorted to simply doing more of the same; sending more emails, displaying more ads, running more discounts. And yet, consumer expectations are high, and many brands are missing out on sales by delivering experiences that consumers either don't want or don't see. Many expect a consistent, personalized, omnichannel experience while engaging with brands, leaving marketers in an unenviable position.

Within this report, variances between consumer behaviors in the US and UK are clear. Whereas the majority of UK consumers favor 2 or 3 traditional channels through which to

engage with brands (email, in store and desktop browser), in the US, consumers spread themselves thinly, with social and mobile channels being more widely used.

During the pandemic, 56% of US consumers rated the importance of a mobile experience as very high, whereas in the UK just 34% feel the same. The US consumer is evidently more hybrid in the way they engage with brands, and the impact of the mobile journey on US marketers is therefore more sizeable. This is a strong warning for UK marketers, who still have time to up their game on social and mobile channels before the UK consumer market follows suit over the coming 12-24 months.

The key to success for marketers is in their data. Collecting, analyzing, and acting upon customer data from the ground up is the only way to predict, and overcome, obstacles and deliver the experiences customers not only want, but expect.

There is a lot of data to consume in this report, and all marketing leaders and doers will find something relevant to them. I hope that readers will gain insights to help with their future planning, and that brands looking to better engage with the hybrid consumer across multiple channels and devices will be inspired to adopt a test-and-learn mentality.

Thank you for reading,

Anthony Botibol

Key global findings

We found that over half (55%) of all US and UK consumers surveyed said that having a personalized shopping experience with a brand is important to them. However, only 26.5% said that the brands they interact with provide a similar shopping experience across all channels, at all times.

Meanwhile, 30% of marketers strongly agree that their team delivers a consistent and personalized offer or message across three or more channels, highlighting a deadlock between marketers' perceptions of the experience they offer and the reality. To improve their personalization efforts and to deliver the experience customers expect, marketers must analyze and act upon the sentiment and feedback of their customers through Voice of Customer (VOC) programs.

A stronger understanding of customers is needed, which can only come from having a complete, accurate and trustworthy pool of data to draw insights from. However, despite 83.5% of marketers agreeing that they have all their customer data integrated into a single data source, 84% agreed that it's a challenge to unify the data of individuals with multiple digital identities. It seems that this struggle has been noticed by consumers, as only 43% thought brands understood their shopping needs.

Poor data quality, a lack of skills and knowledge, and a lack of data and tech were all identified as barriers stopping marketers from fully personalizing marketing messages to an individual. Our research also shows that, although businesses are collecting a lot of consumer data, it is not necessarily being used to improve the customer experience.

Businesses collect feedback on consumers' online/offline shopping experiences, preferred channels, personal likes and dislikes, and preferred frequency of contacts from brands, some inferred through behavioral analytics, the rest collected first hand from the customer. However, a little under half (42.5%) of this valuable information isn't being used. If marketers are empowered to make full use of all the data they collect, they will be better equipped to understand how and where their consumers are interacting with them, and in turn, how they can best serve them across all online and offline channels.

Section 1:

Consumer Results

A deep dive into the feedback from 4,000 consumers across the US and UK to find out how well businesses are engaging with them and which channels they use to interact with brands.

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Q1. What methods do you use to interact with brands?

We investigated which online and offline channels consumers use to interact with brands, and found some interesting differences between UK and US consumers.

In the UK, there were some clear favorites **(Figure 1)**. *Email* came out on top, with 61% of respondants, followed by *in store/in-branch* and *laptop/desktop web browser*, both 51%. *TV* was next (48%), and in fifth place was *Facebook* (39%).
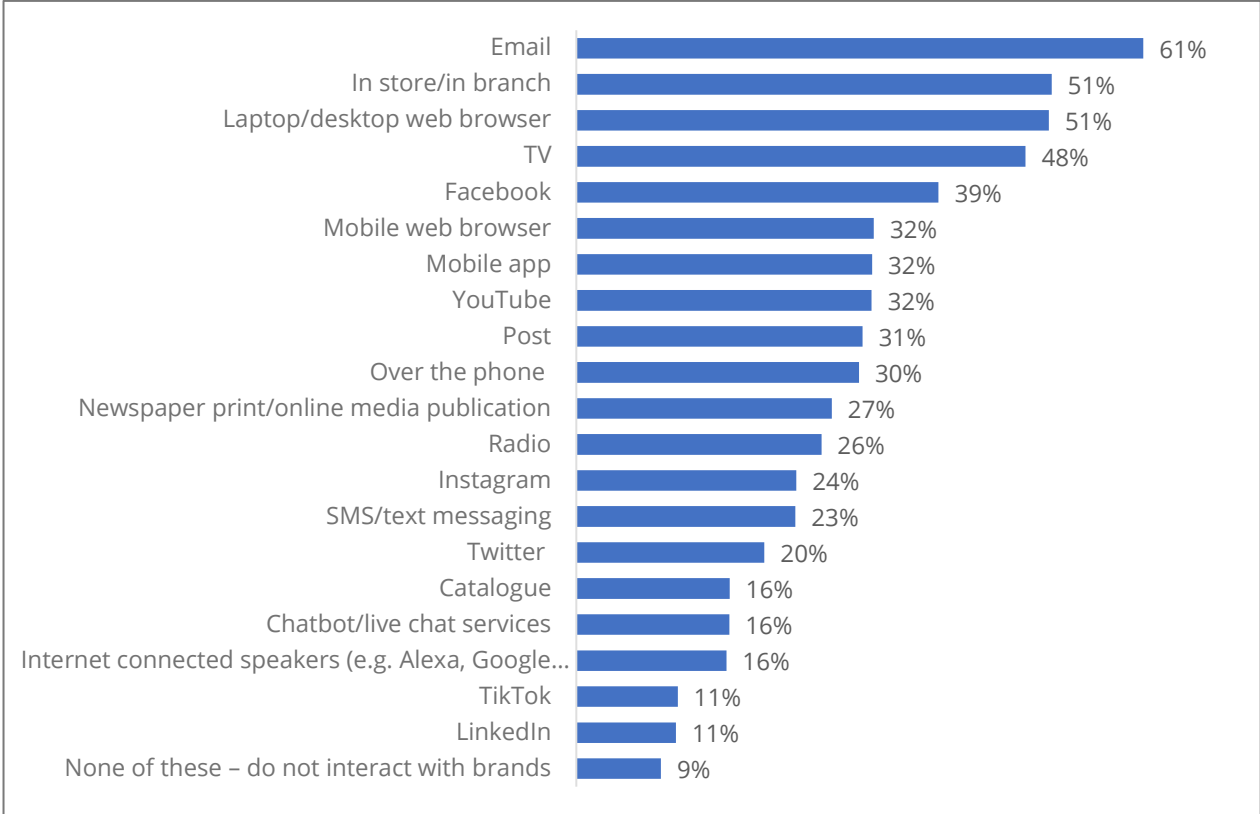
Channel	Percentage
Email	61%
In store/in branch	51%
Laptop/desktop web browser	51%
TV	48%
Facebook	39%
Mobile web browser	32%
Mobile app	32%
YouTube	32%
Post	31%
Over the phone	30%
Newspaper print/online media publication	27%
Radio	26%
Instagram	24%
SMS/text messaging	23%
Twitter	20%
Catalogue	16%
Chatbot/live chat services	16%
Internet connected speakers (e.g. Alexa, Google...)	16%
TikTok	11%
LinkedIn	11%
None of these – do not interact with brands	9%

Figure 1 - UK consumer results (Base n = 2,000)

In the US **(Figure 2)**, answers were more polarized. *Email* was also the top answer from US consumers, *laptop/desktop browser* and *Facebook* were a close second (both 43%), followed by *in store/in branch* and *mobile app* (both 41%)
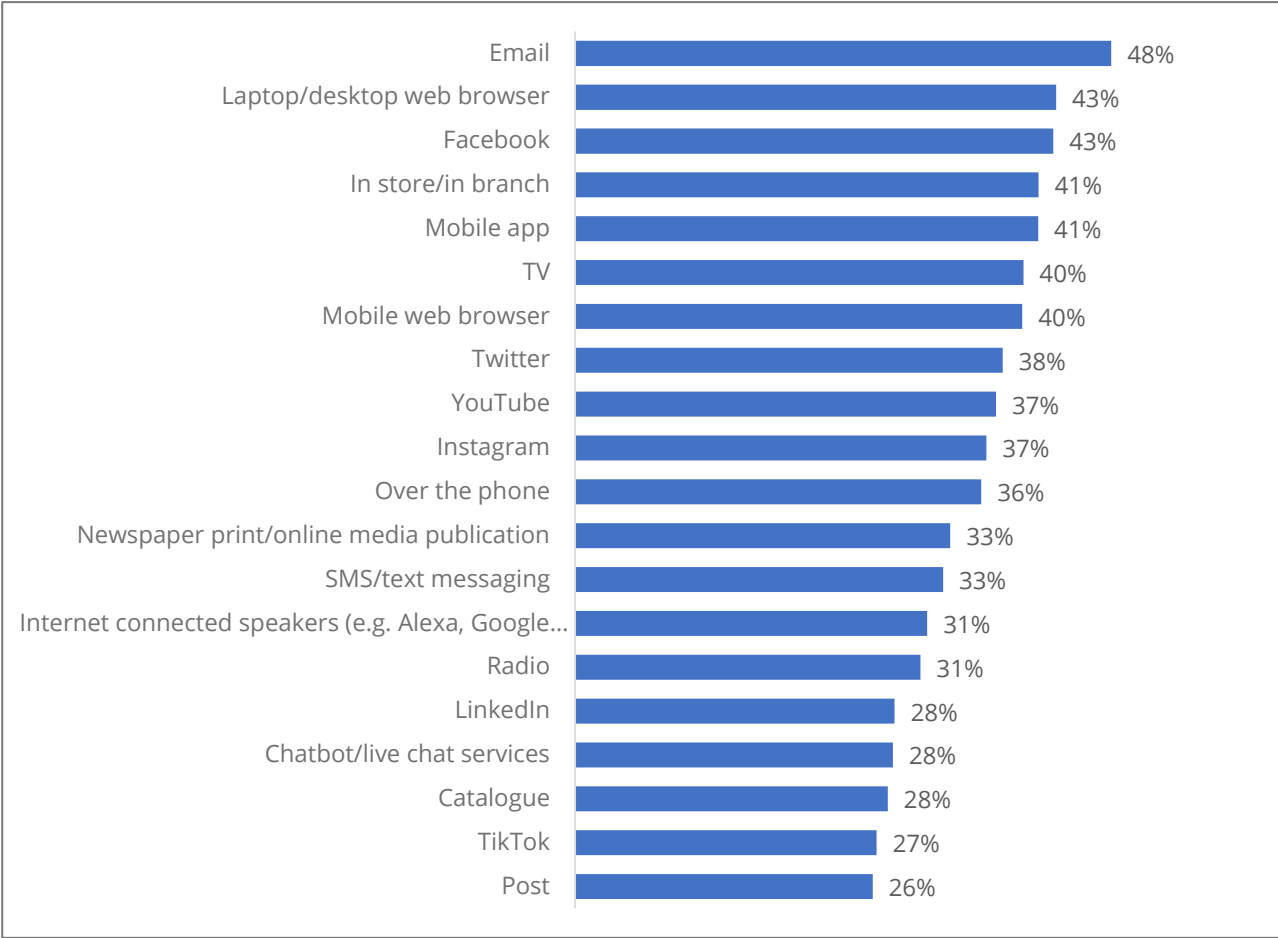
Email	48%
Laptop/desktop web browser	43%
Facebook	43%
In store/in branch	41%
Mobile app	41%
TV	40%
Mobile web browser	40%
Twitter	38%
YouTube	37%
Instagram	37%
Over the phone	36%
Newspaper print/online media publication	33%
SMS/text messaging	33%
Internet connected speakers (e.g. Alexa, Google...	31%
Radio	31%
LinkedIn	28%
Chatbot/live chat services	28%
Catalogue	28%
TikTok	27%
Post	26%

Figure 2 - US consumer results (Base n = 2,000)

Q2. Please indicate your preferred places to browse and/or shop for the following goods or services.

Across seven industry classifications, we asked consumers to tell us how they prefer to browse and/or shop for goods and services, to determine which channels are most popular.

These industry classifications break down as:

1. **Clothing, homeware and exercise equipment**
2. **Financial services**
3. **Insurance**
4. **Cars**
5. **Charitable donations**
6. **Holiday or leisure**
7. **TV, movies or entertainment**

Clothing, homeware, and exercise equipment

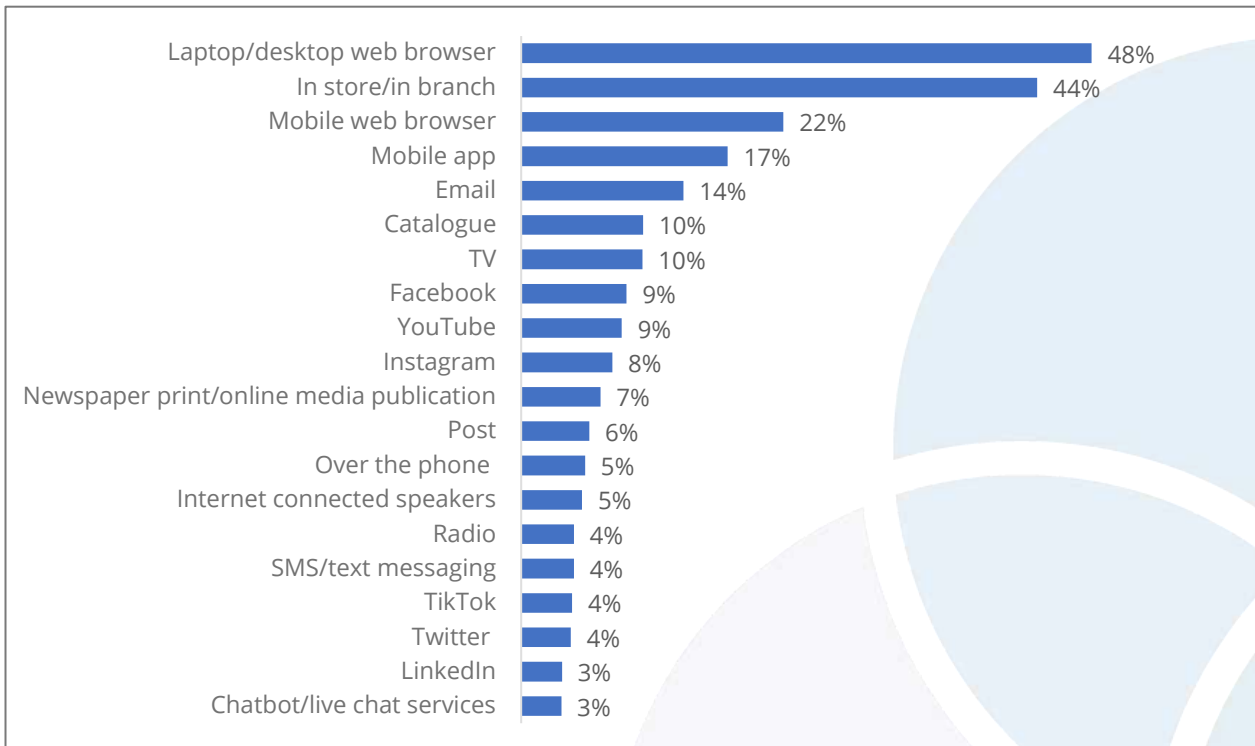| Channel	Percentage
Laptop/desktop web browser	48%
In store/in branch	44%
Mobile web browser	22%
Mobile app	17%
Email	14%
Catalogue	10%
TV	10%
Facebook	9%
YouTube	9%
Instagram	8%
Newspaper print/online media publication	7%
Post	6%
Over the phone	5%
Internet connected speakers	5%
Radio	4%
SMS/text messaging	4%
TikTok	4%
Twitter	4%
LinkedIn	3%
Chatbot/live chat services	3%

Figure 3 - UK consumer results (Base n = 2,000)

In the UK, when shopping for clothing, homeware and exercise equipment *(Figure 3)*, consumers rank *laptop/desktop web browser* (48%) and *in store/in branch* (48%) as their overwhelming favorite ways to interact with brands.

However, the US is again less forthright with their preferred channels *(Figure 4)* with just 14 percentage points difference between the top 10 answers. The top answer in the US was *in store/in branch* (35%), followed by *mobile web browser* (31%), then *laptop/desktop web browser* (30%), with *Facebook* (28%) and *Instagram* (26%) making up the final positions in the top 5.

Channel	Percentage
In store/in branch	35%
Mobile web browser	31%
Laptop/desktop web browser	30%
Facebook	28%
Instagram	26%
Mobile app	26%
Twitter	25%
Over the phone	24%
SMS/text messaging	22%
Radio	21%
Internet connected speakers	21%
Email	21%
LinkedIn	20%
Post	20%
YouTube	19%
Catalogue	19%
Newspaper print/online media publication	18%
TV	18%
TikTok	16%
Chatbot/live chat services	15%

Figure 4 - US consumer results (Base n = 2,000)

Financial services

When shopping for financial services products or services, UK consumers *(Figure 5)* were overwhelmingly more likely to browse and/or shop via *laptop/desktop web browser* (41%) than any other channel. The second most preferred channel was in store/in branch at 17%, closely followed by a mobile app (15%) and mobile web browser (14%).

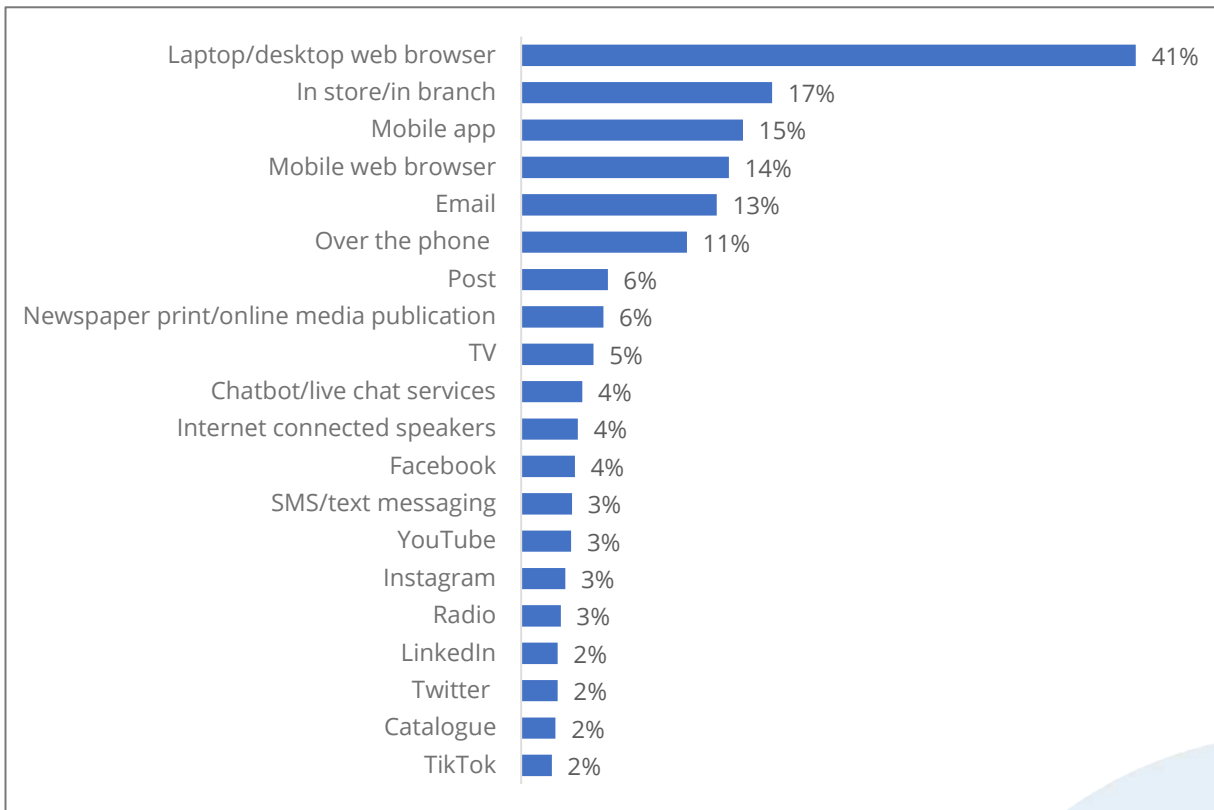| Channel	%
Laptop/desktop web browser	41%
In store/in branch	17%
Mobile app	15%
Mobile web browser	14%
Email	13%
Over the phone	11%
Post	6%
Newspaper print/online media publication	6%
TV	5%
Chatbot/live chat services	4%
Internet connected speakers	4%
Facebook	4%
SMS/text messaging	3%
YouTube	3%
Instagram	3%
Radio	3%
LinkedIn	2%
Twitter	2%
Catalogue	2%
TikTok	2%

Figure 5 - UK consumer results (Base n = 2,000)

The US results *(Figure 6)* show a much more diverse range of channels once again, with the *mobile app* being the most preferred channel at 29%, followed by *laptop/desktop web browser* (26%), then *over the phone* (25%) and *in store/in branch* (24%).

Channel	Percentage
Mobile app	29%
Laptop/desktop web browser	26%
Over the phone	25%
In store/in branch	24%
SMS/text messaging	21%
Mobile web browser	21%
Newspaper print/online media publication	20%
Chatbot/live chat services	20%
Email	19%
Radio	18%
Facebook	18%
Internet connected speakers	18%
Twitter	16%
Instagram	15%
TV	15%
LinkedIn	14%
TikTok	14%
Catalogue	14%
YouTube	13%
Post	13%
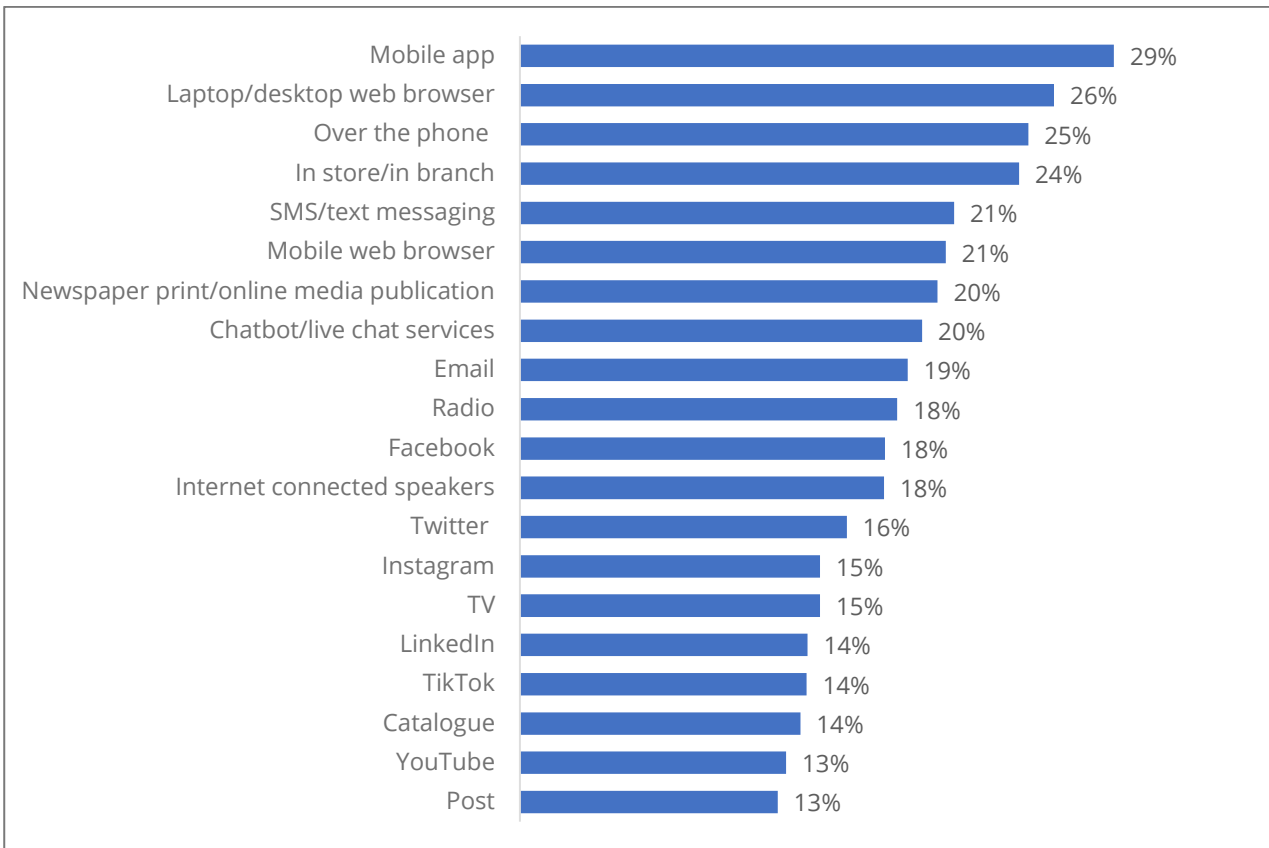
Figure 6 - US consumer results (Base n = 2,000)

It's worth noting, however, that 20%+ of US consumers admitted to eight channels being their preferred places to browse and shop for financial services, versus the UK where only one channel, *laptop/desktop web browser* achieved over 20% of all the available answers.

Insurance

When shopping for insurance products or services, UK consumers *(Figure 7)* are more likely to do so via *laptop/desktop web browser* (47%), with the second most popular channel being *over the phone* (17%).

This is in contrast to US consumers *(Figure 8)*, who show more of a hybrid approach, with *over the phone* (27%), *laptop/desktop web browser* (26%), *email* (26%), and *mobile web browser* (24%) all achieving similar results.

Figure 7 - UK consumer results (Base n = 2,000)

UK consumer results:

Channel	Percentage
Laptop/desktop web browser	47%
Over the phone	17%
Mobile web browser	15%
Email	14%
Mobile app	8%
In store/in branch	6%
Post	6%
TV	5%
Chatbot/live chat services	4%
Newspaper print/online media publication	4%
Internet connected speakers	3%
SMS/text messaging	3%
Facebook	3%
Radio	3%
LinkedIn	3%
Twitter	2%
Instagram	2%
YouTube	2%
Catalogue	2%
TikTok	2%

Figure 8 - US consumer results (Base n = 2,000)

US consumer results:

Channel	Percentage
Over the phone	27%
Laptop/desktop web browser	26%
Email	26%
Mobile web browser	24%
In store/in branch	23%
Newspaper print/online media publication	21%
Instagram	21%
Mobile app	20%
Post	17%
Internet connected speakers	17%
Facebook	16%
YouTube	15%
Twitter	15%
SMS/text messaging	14%
TV	14%
LinkedIn	14%
TikTok	13%
Radio	13%
Chatbot/live chat services	13%
Catalogue	12%

Cars

Shopping for a car is the most hybrid type of UK shopping that we see in the research *(Figure 9)*, with *in store/branch* unsurprisngly leading at 36%, followed by *laptop/desktop web browser* (26%), then *mobile browser* dipping to 11%, while all other channels were insignificant.
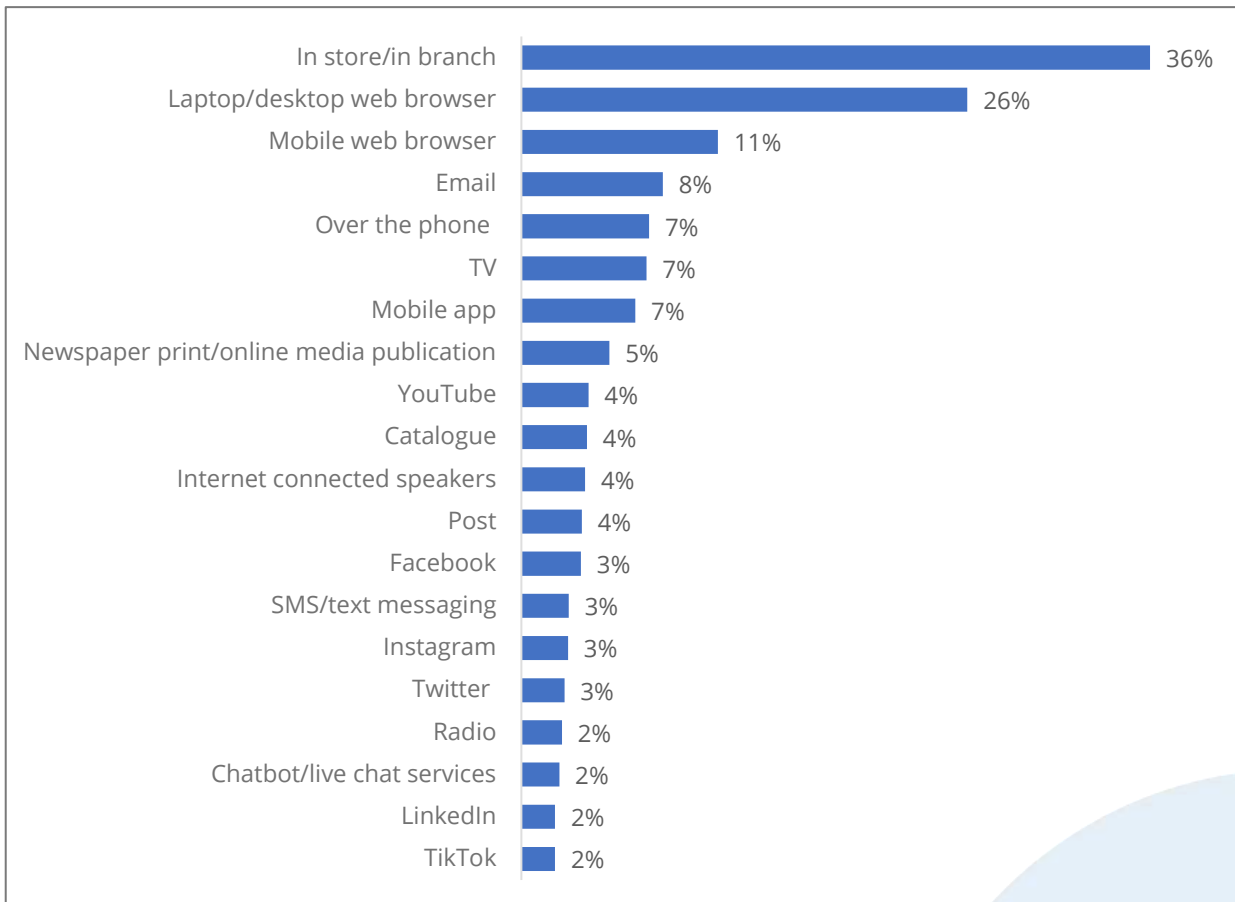
Figure 7 - UK consumer results (Base n = 2,000)

The picture differs hugely in the US however *(Figure 10)*, with hardly any difference between *in store/branch* (topping the list at 24%) and the next most popular channels. These included *internet-connected speakers* (23%), *Instagram* and *Twitter* (both at 22%), and *YouTube* and *over the phone* (tied at 21%).

In store/in branch	24%
Internet connected speakers	23%
Instagram	22%
Twitter	22%
YouTube	21%
Over the phone	21%
Mobile web browser	20%
Laptop/desktop web browser	20%
Mobile app	19%
TikTok	19%
LinkedIn	19%
Post	18%
Facebook	18%
TV	17%
Newspaper print/online media publication	16%
Email	15%
Catalogue	14%
Radio	13%
SMS/text messaging	13%
Chatbot/live chat services	13%
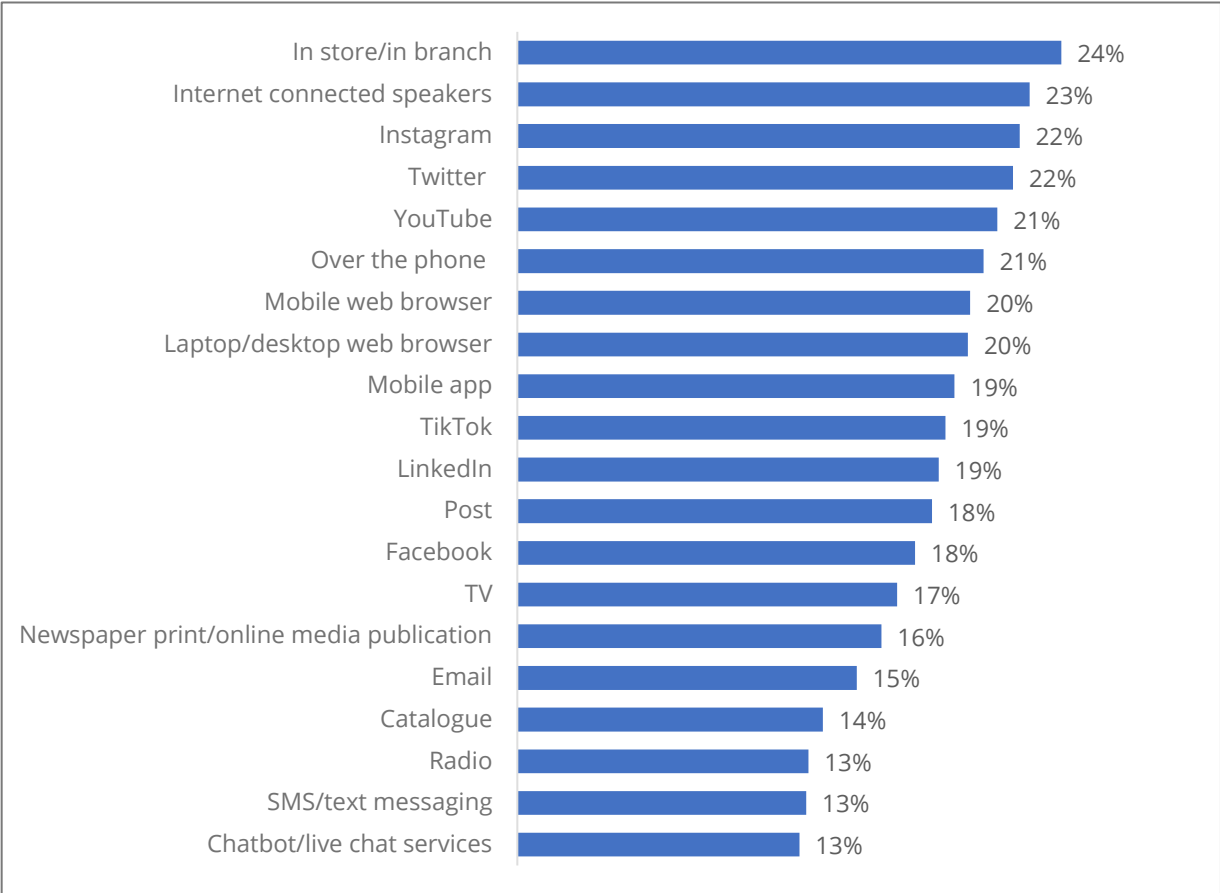
Figure 8 - US consumer results (Base n = 2,000)

Charitable donations

UK consumers *(Figure 11)* would mostly rather donate via *laptop/desktop web browser* (26%), while their US counterparts *(Figure 12)* predominantly opt for *over the phone* (23%).

Laptop/desktop web browser — 26%
In store/in branch — 15%
Mobile web browser — 11%
Email — 9%
Mobile app — 8%
Post — 7%
Facebook — 6%
Over the phone — 6%
SMS/text messaging — 5%
TV — 4%
Instagram — 3%
Newspaper print/online media publication — 3%
YouTube — 3%
Internet connected speakers — 3%
Radio — 3%
Twitter — 2%
Catalogue — 2%
Chatbot/live chat services — 2%
LinkedIn — 2%
TikTok — 1%
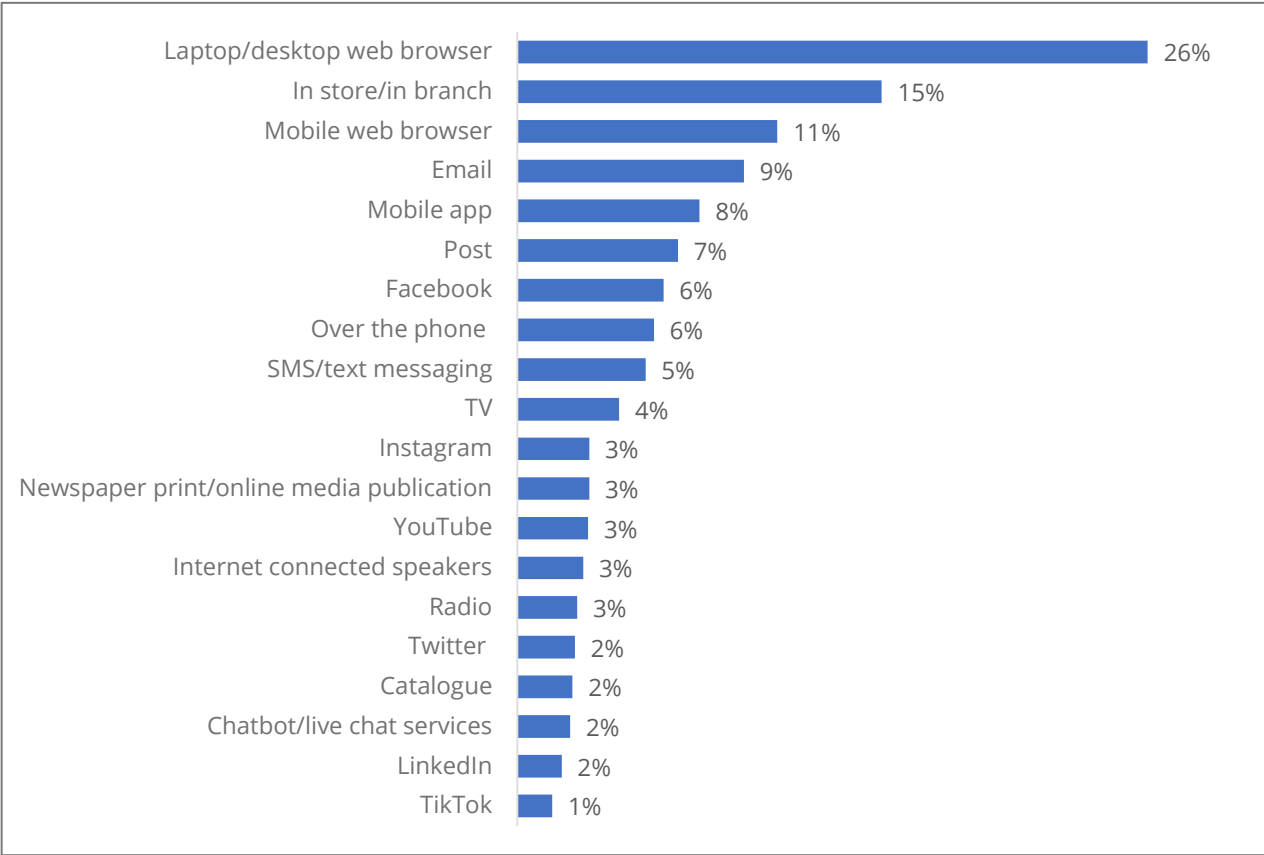
Figure 9 – UK consumer results (Base n = 2000)

We also see US and UK consumers showing different propensities to use social media, with platforms like *Instagram* and *TikTok* being far more widely used in the US than in the UK.
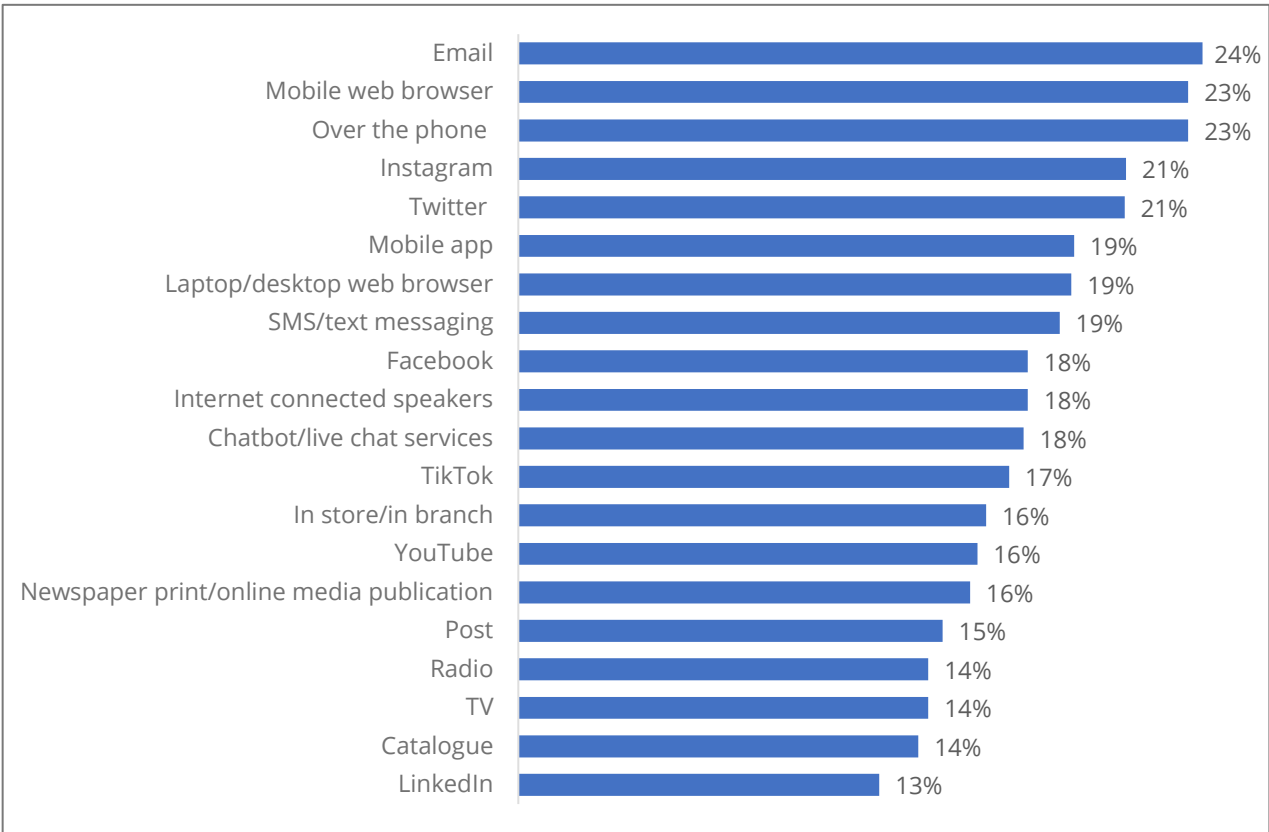
Figure 10 – US consumer results (Base n = 2000)

Holiday or leisure

By far the leading channel for browsing/shopping in this category in the UK *(Figure 13)* is *laptop/desktop web browser* (54%). In contrast, the US consumers *(Figure 14)* list *laptop/desktop web browser* and *internet-connected speakers* as equals (24% for both), and use a range of different channels to shop and browse for holidays and leisure activities.
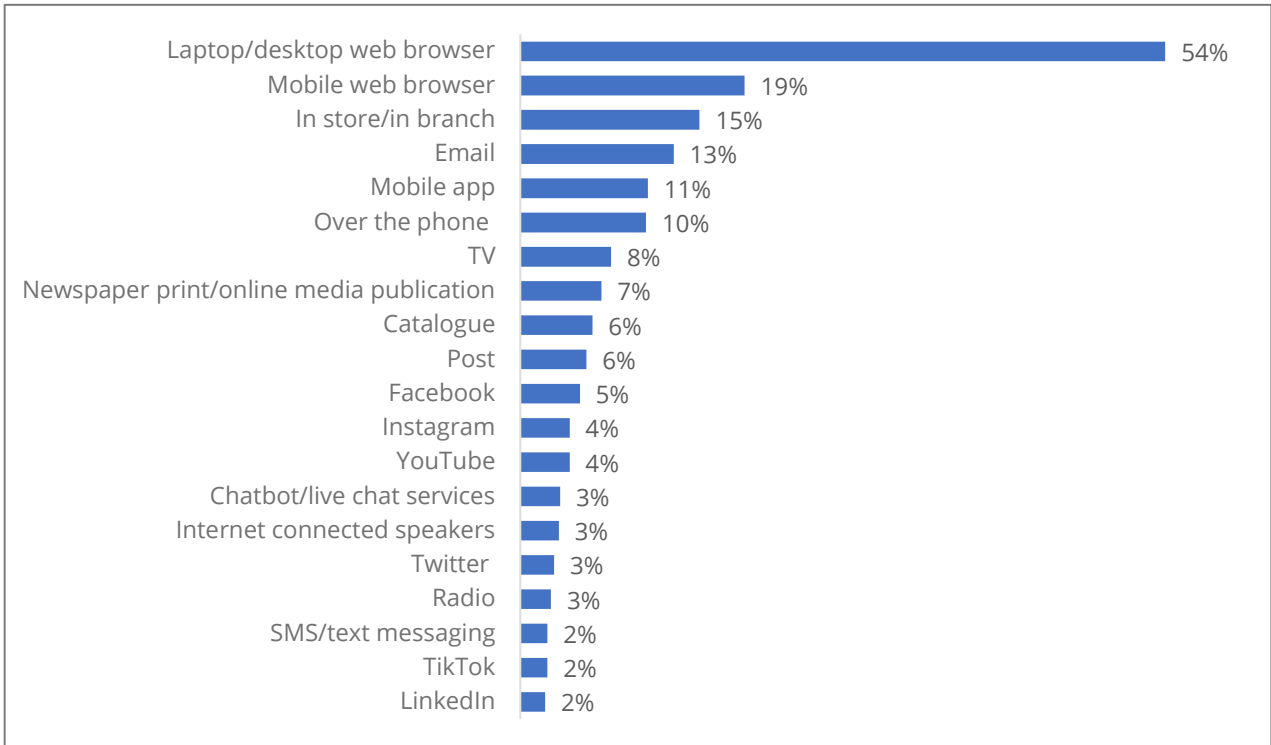
Figure 11 – UK consumer results (Base n = 2000)

Channel	UK %
Laptop/desktop web browser	54%
Mobile web browser	19%
In store/in branch	15%
Email	13%
Mobile app	11%
Over the phone	10%
TV	8%
Newspaper print/online media publication	7%
Catalogue	6%
Post	6%
Facebook	5%
Instagram	4%
YouTube	4%
Chatbot/live chat services	3%
Internet connected speakers	3%
Twitter	3%
Radio	3%
SMS/text messaging	2%
TikTok	2%
LinkedIn	2%
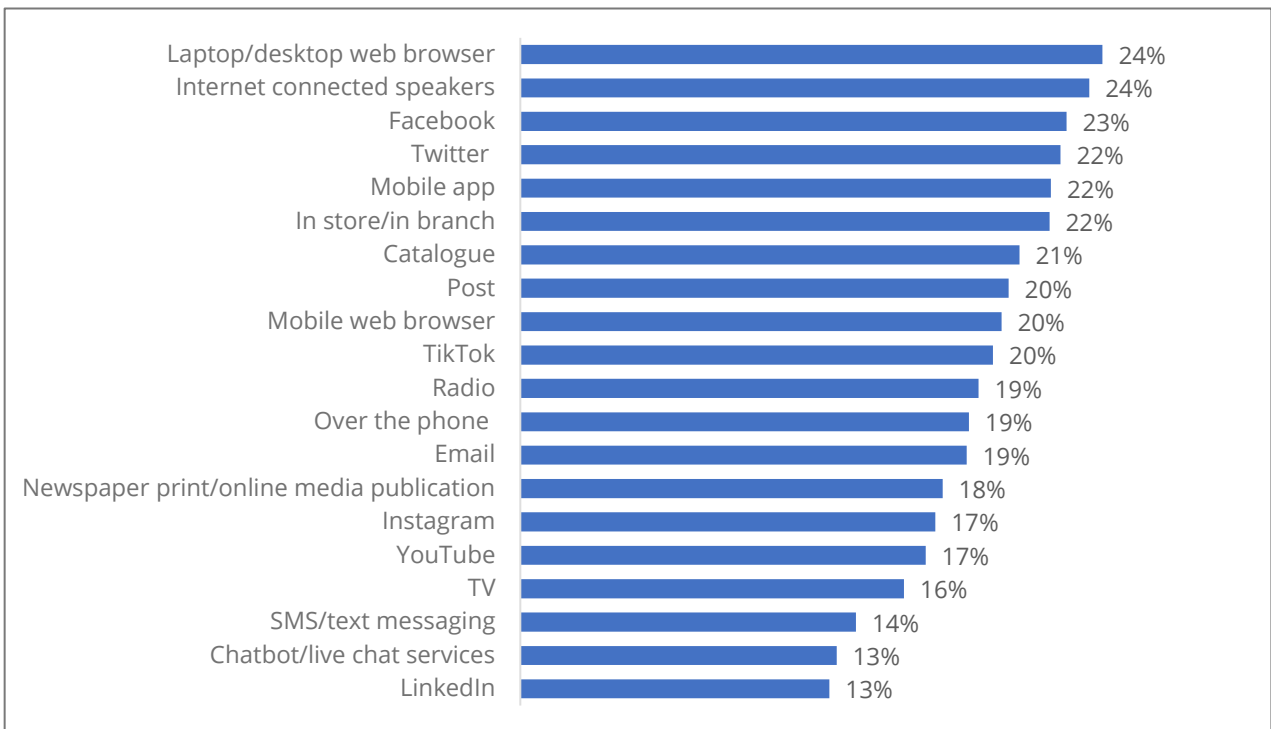
Figure 14 – US consumer results (Base n = 2000)

Channel	US %
Laptop/desktop web browser	24%
Internet connected speakers	24%
Facebook	23%
Twitter	22%
Mobile app	22%
In store/in branch	22%
Catalogue	21%
Post	20%
Mobile web browser	20%
TikTok	20%
Radio	19%
Over the phone	19%
Email	19%
Newspaper print/online media publication	18%
Instagram	17%
YouTube	17%
TV	16%
SMS/text messaging	14%
Chatbot/live chat services	13%
LinkedIn	13%

TV, movies, and entertainment

In this category TV (37%) comes in strong in the UK *(Figure 15)*, however it is still slightly behind *laptop/desktop web browsers* (38%). Next comes *YouTube (16%), followed by mobile web browser (15%)*.
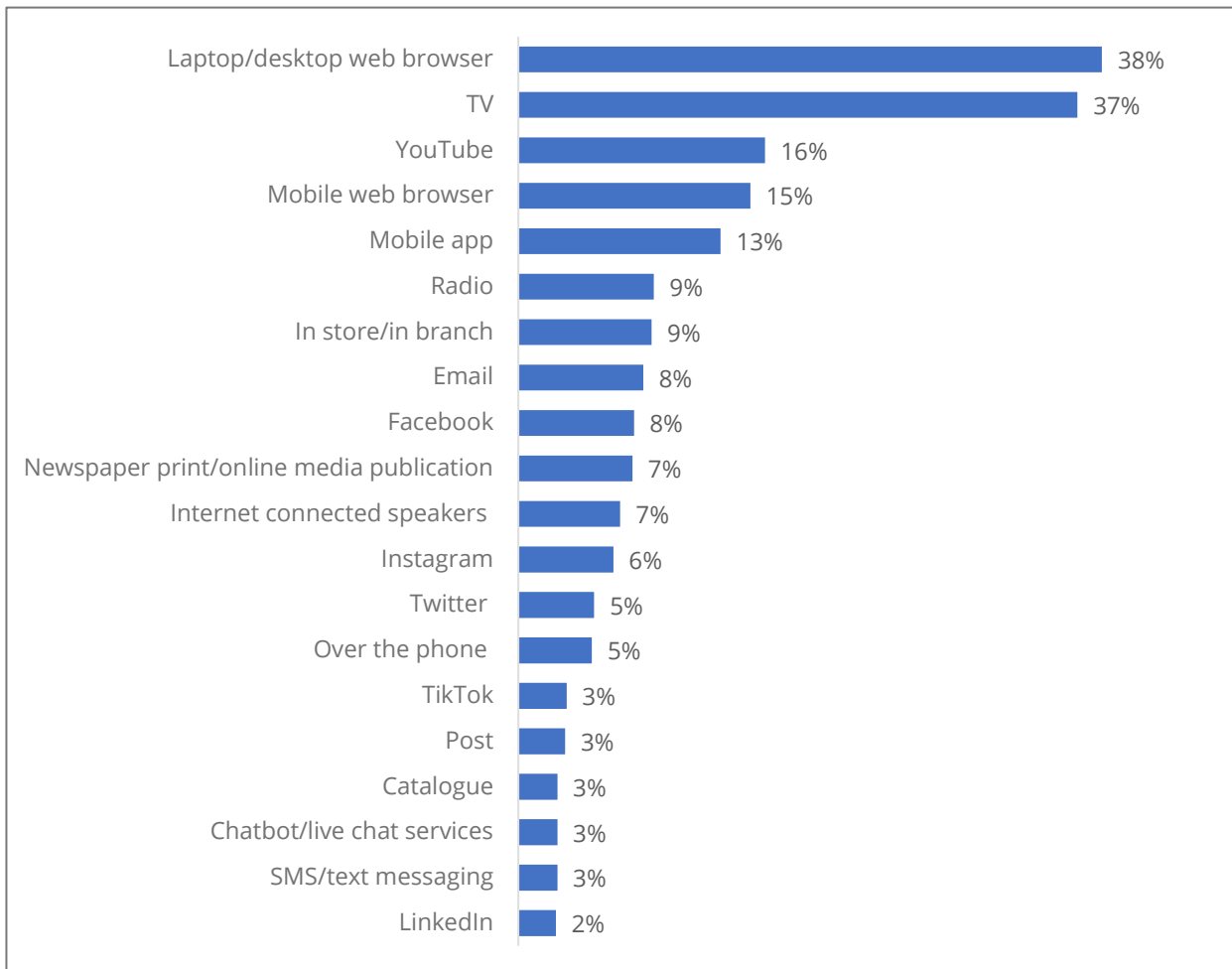
Figure 15 – UK consumer results (Base n = 2000)

We see *laptop/desktop web browser* (29%) leading the way for the US too *(Figure 16)*, beating out *TV* and *Facebook* (both 26%), with *YouTube* way down in sixth place (22%).
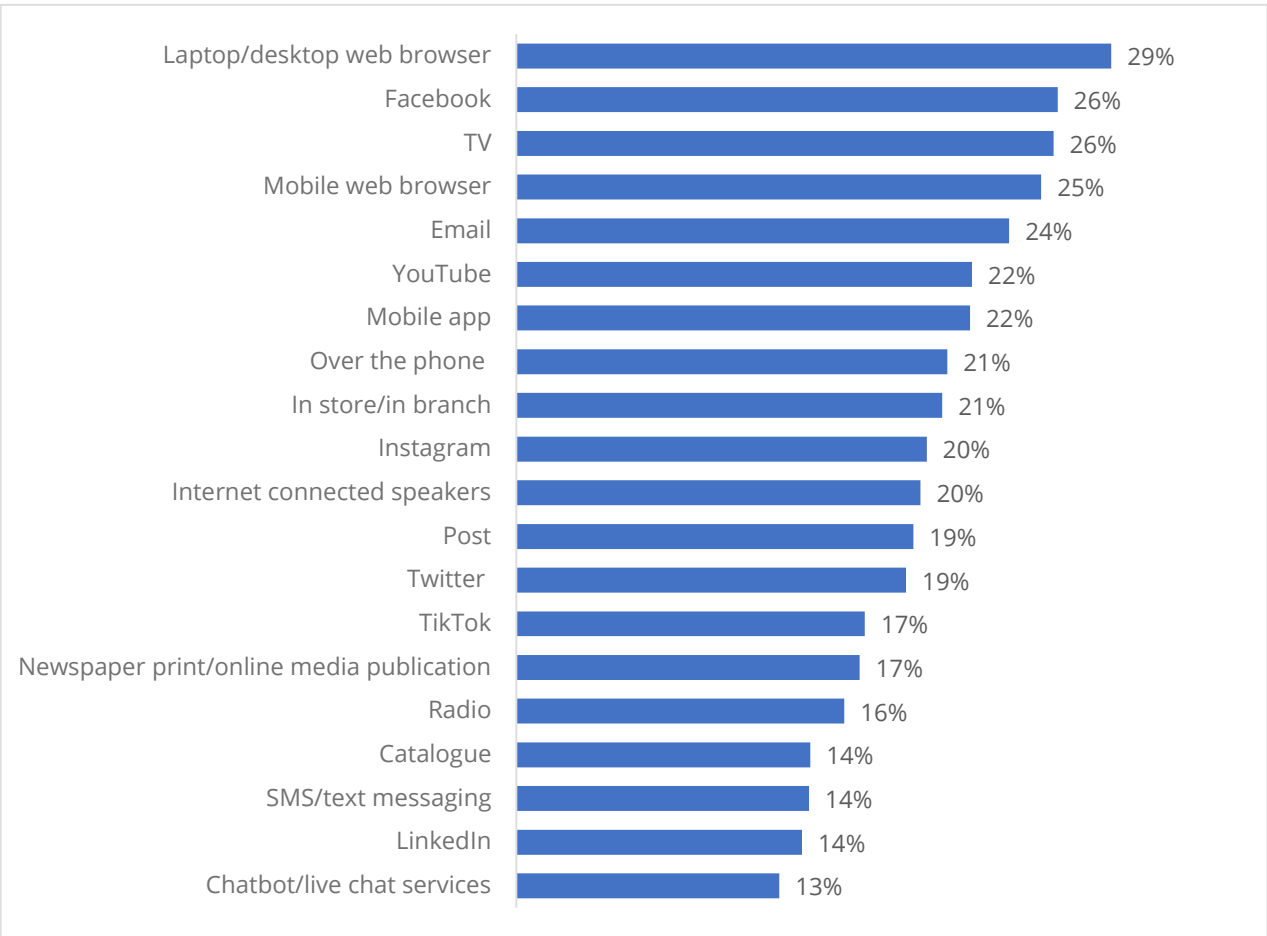
Figure 16 – US consumer results (Base n = 2000)

Q3. How important is it that you feel a brand is creating a personalized shopping experience for you?

The results *(Figure 17)* show that US marketers need to focus much harder than their UK counterparts on delivering personalized shopping experiences. Almost four times more US consumers say that they feel a personalized shopping experience is 'very important', 40% versus just 11% of UK consumers.

UK consumers

11%
31%
32%
14%
12%

- **Very important**
- **Somewhat important**
- **Neither important nor unimportant**
- **Somewhat unimportant**
- **Very unimportant**

US consumers

3%
5%
25%
40%
28%

- **Very important**
- **Somewhat important**
- **Neither important nor unimportant**
- **Somewhat unimportant**
- **Very unimportant**
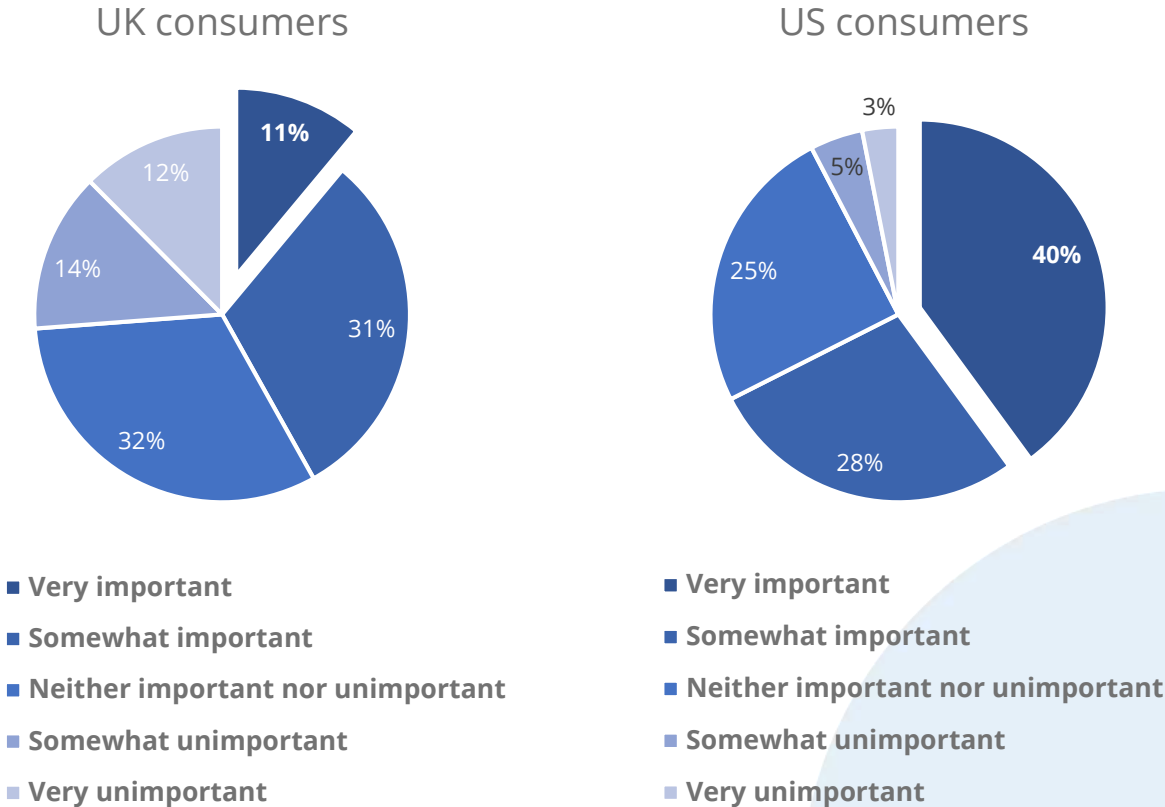
Figure 17 – UK and US consumer results (Base n = 4000)

Q4. Do you feel like the brands you interact with provide a similar shopping experience across all the places that you browse/shop with them?

It seems as though US marketers are doing a better job of delivering a consistent cross-channel shopping experience, with more US consumers (41%) feeling that brands provide a similar shopping experience all the time (online and offline), versus just 12% of UK consumers *(see Figure 18).*
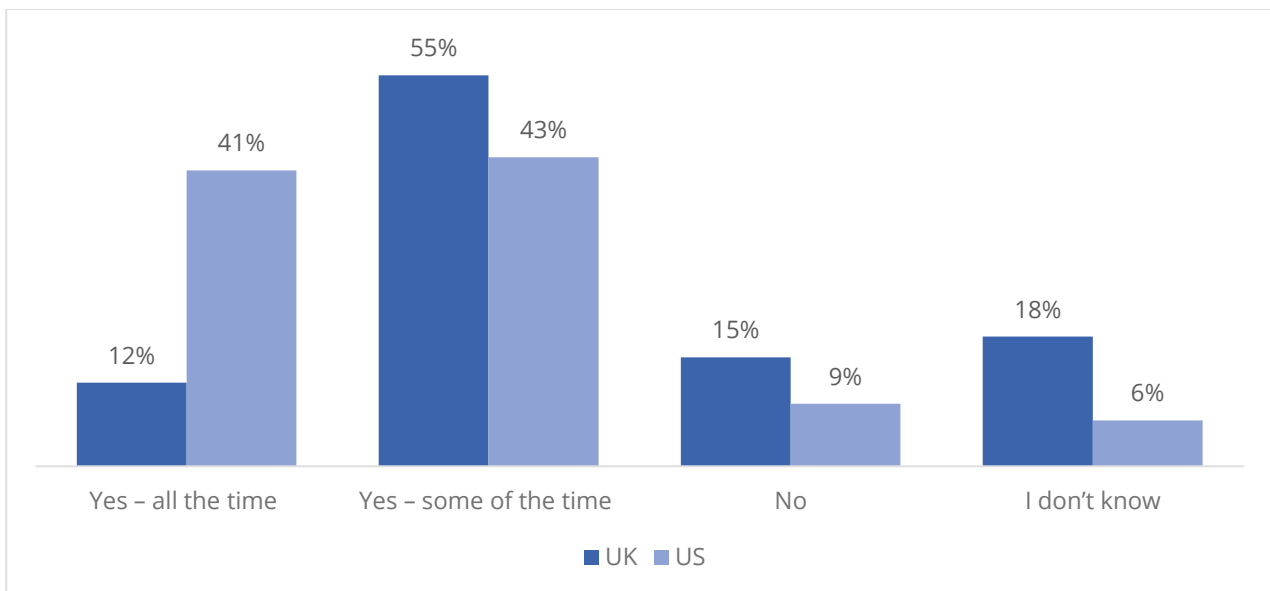
Figure 18 – UK and US consumer results (Base n = 4000)

This is particularly interesting when our marketers' results show that 39% of UK marketers strongly agree that they are offering a consistent experience across three or more channels, versus just 21% of US marketers *(Figure 37).*

Q5. How far do you agree or disagree with the following statement? 'I have considerably increased the amount I shop on my mobile phone over the last year.'

Mobile commerce is becoming the norm in the US, where 32% strongly agreed to an increase in mobile usage, versus just 13% in the UK. The race to establish impeccable mobile website standards and mobile apps with a great CX is therefore on for US marketers, and brands who are not already optimized for mobile commerce will need to ensure it's priority on their immediate roadmaps. In the UK, consumers seem to be slower on the uptake of mobile shopping, with a quarter (25%) answering that they *strongly disagree* **(Figure 19)**.
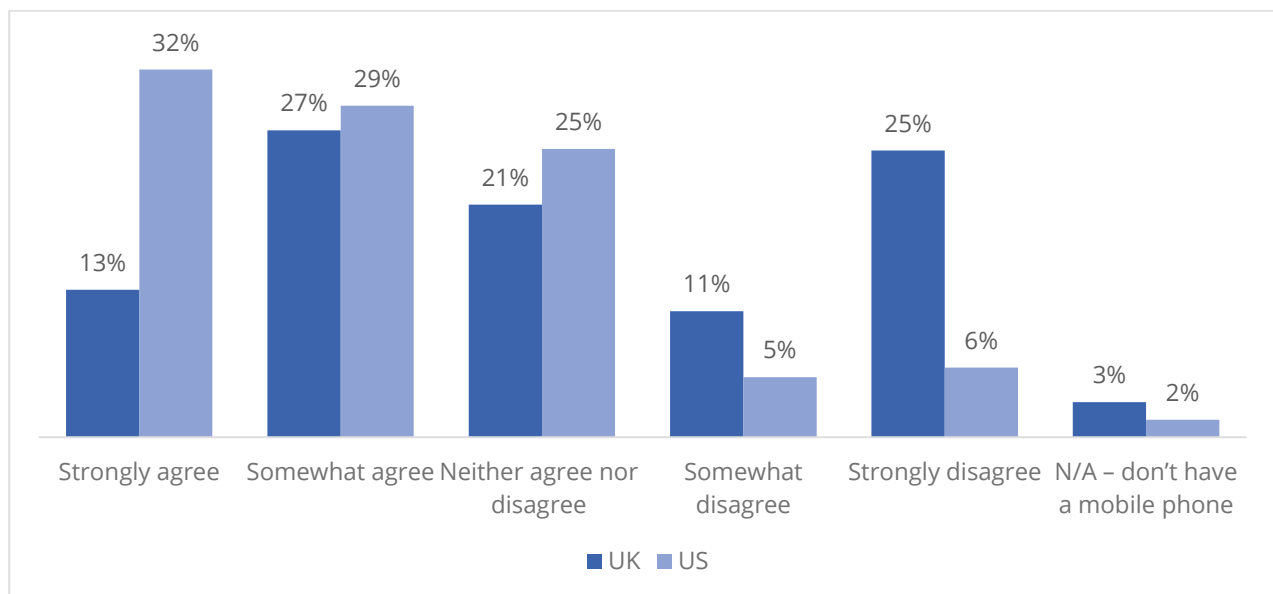
Figure 19 – UK and US consumer results (Base n = 4000)

Q6. Which of the following statements do you agree with, in regards to why you would be encouraged to use a brand's mobile app over its mobile website?

We found a higher proportion of US consumers (89%) agreed that they would use a mobile app over a web browser, if it provided a better or more personalized user experience, compared with just half (50%) of UK consumers *(Figure 20)*.
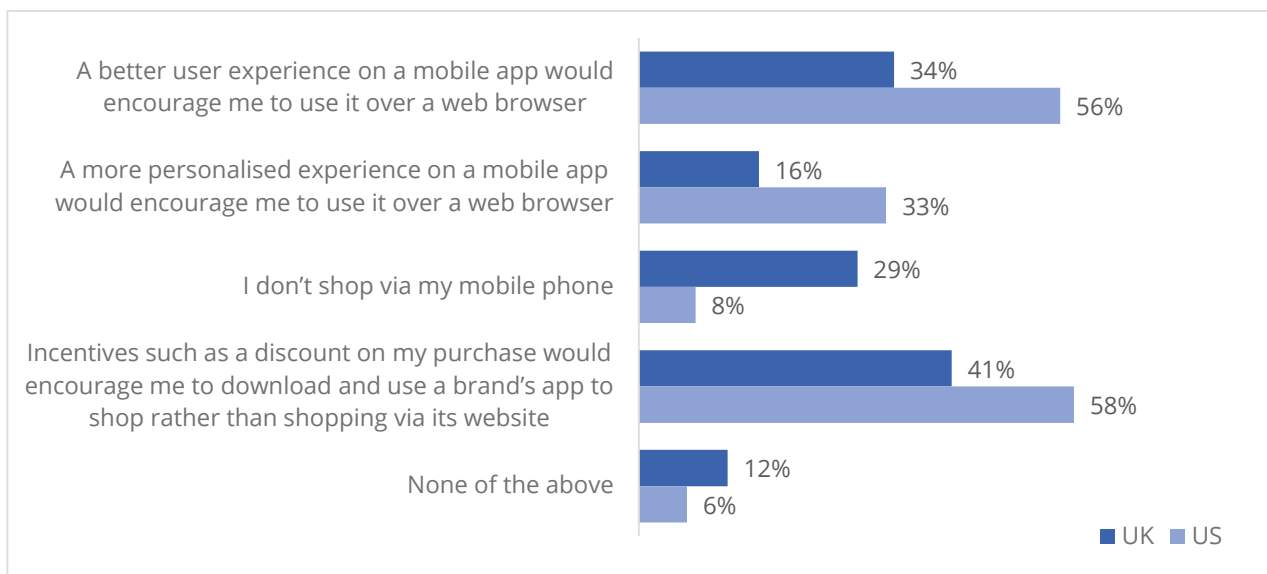
Figure 20 – UK and US consumer results (Base n = 4000)

Q7. Which of the following statements do you most agree with, in regards to your preference to use a brand's website or a brand's mobile app?

UK consumers are seemingly indifferent when asked if they prefer to shop via a brand's app or their mobile website. Almost a third had *no preference*, while 37% said they'd *prefer to use a website over an app*, and 31% said they'd *prefer to use an app (Figure 21)*.
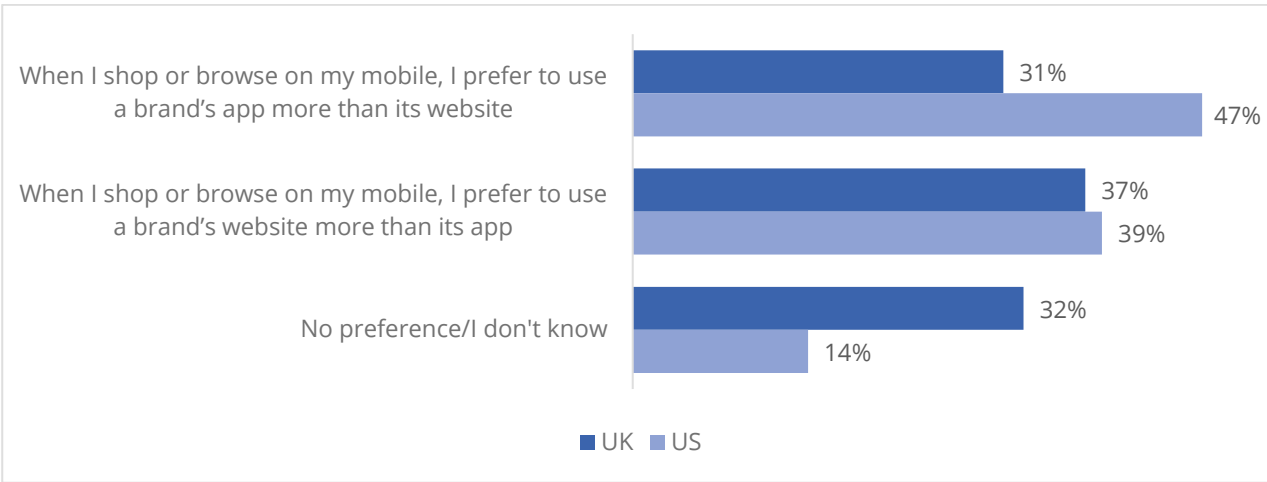
Figure 21 – UK and US consumer results (Base n = 4000)

In the mobile-friendly US though, the results paint a different picture. 47% said they would *prefer to use an app over a mobile web browser*, while 39% said they'd *prefer to use the mobile web browser over an app*. Only 14% said they had *no preference*.

Q8. When shopping online, please indicate how likely or unlikely the following issues would be to stop you from buying a product or service?

We have already established that personalized experiences seem to be more important to US consumers than their UK equals. Hence, it's unsurprising that 58% of US consumers *(Figure 23)* said that the lack of personalized experience would be very or somewhat likely to stop them from buying a product/service online, versus 33% in the UK *(Figure 22)*.

Communication and transparency about data security and data sharing need to be a focus area in both countries, with 75% of UK consumers and 73% of US consumers saying that concerns over security of data or sharing data would deter them from buying.
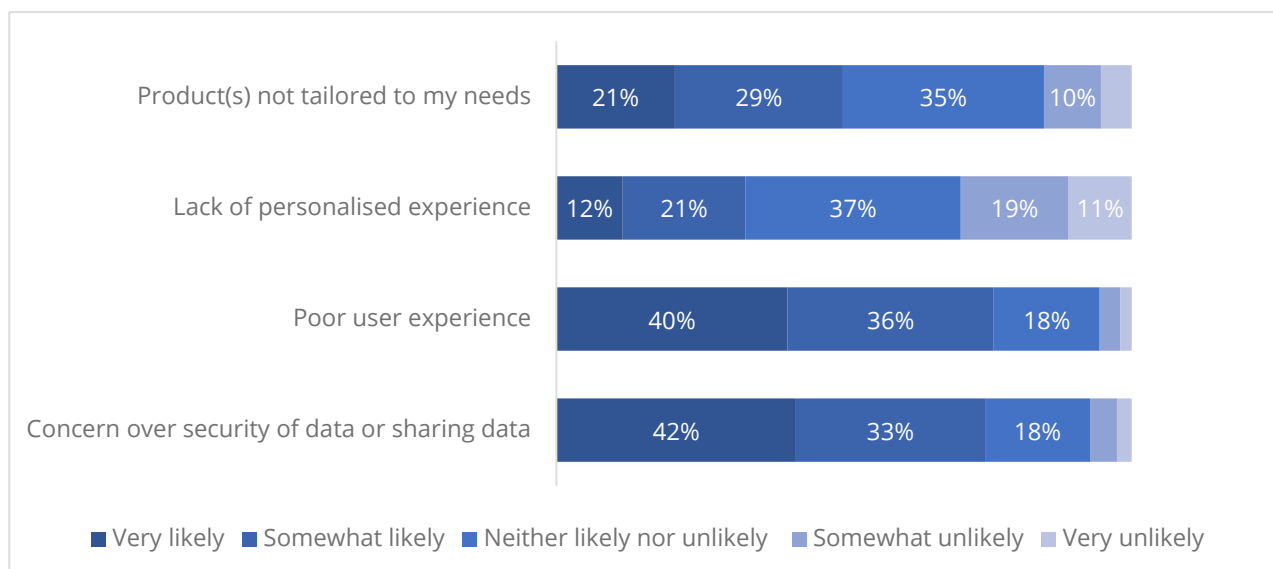
Figure 22 – UK consumer results (Base n = 2000)
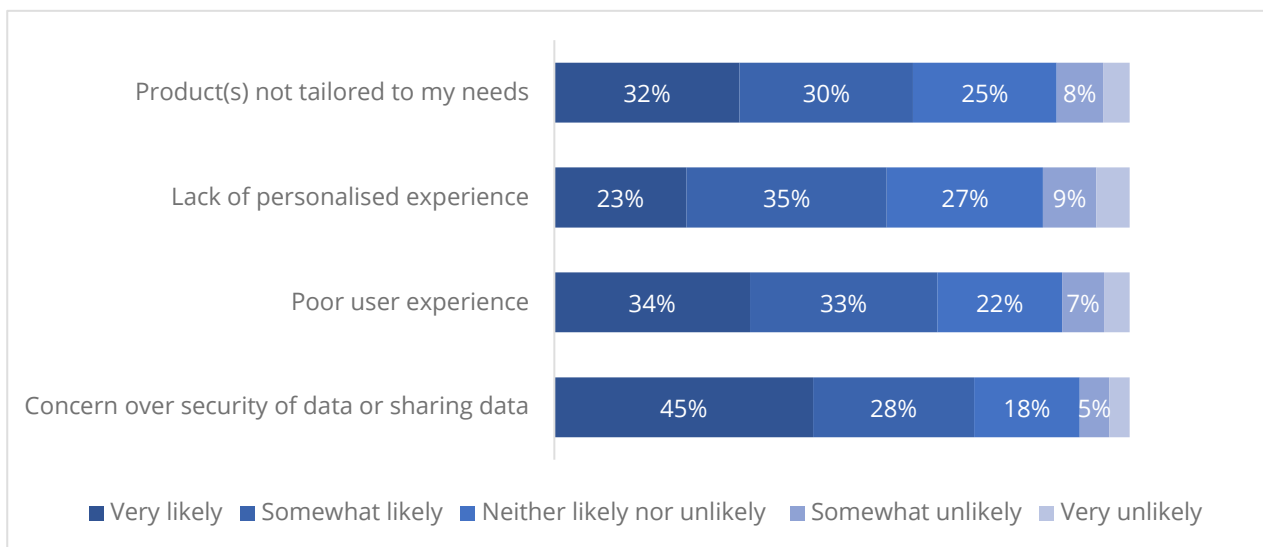
Figure 23 – US consumer results (Base n = 2000)

In addition to data security, marketers must add user experiences to their 'to-do' list, since 76% of UK consumers and 67% of US consumers state that a poor user experience is likely to stop them from making a purchase.

Q9. When shopping in store, please indicate how likely or unlikely the following issues are/would be to stop you from buying a product or service

The results are similar for in store shopping. UK consumers *(Figure 24)* place high importance on their customer experience, with 74% reporting that they are *very likely* or *somewhat likely* to not buy if the experience is poor. Security of data (56%), products not tailored to their needs (49%), and a lack of personalized experience (34%) are also issues of concern.
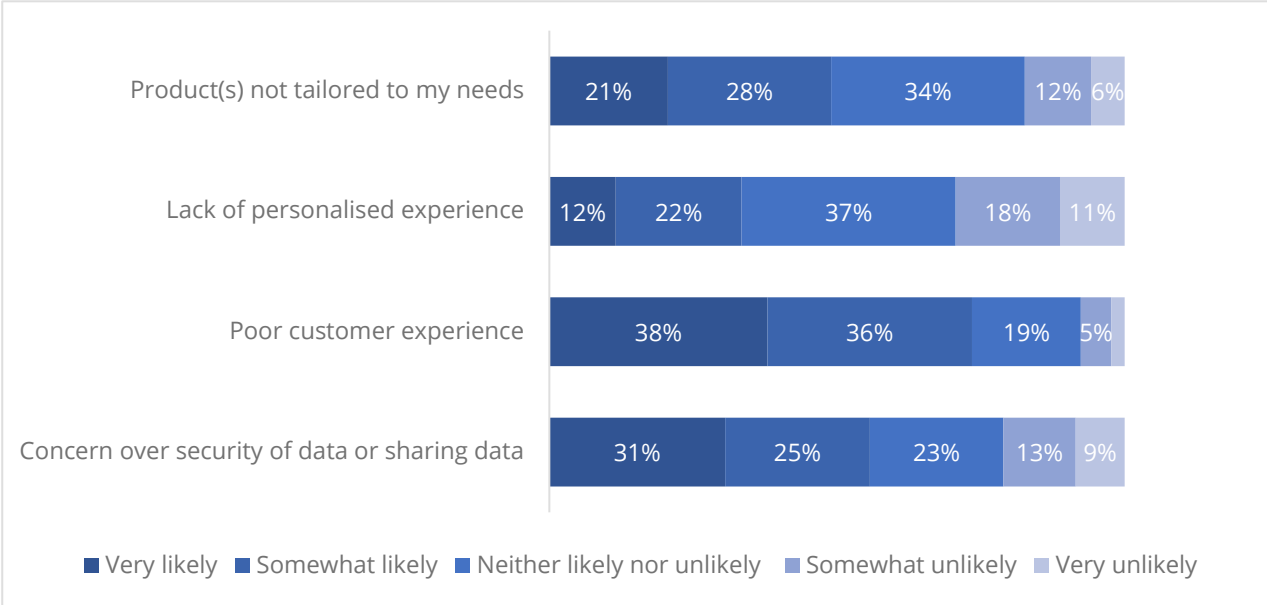
Figure 24 – UK consumer results (Base n = 2000)

For US consumers *(Figure 25),* data security is the factor most likely to stop them from buying in store, with 74% saying they are *very likely* or *somewhat likely* to not buy if data security is a concern. As a point of concern, this was followed by a poor customer experience (68%), products not tailored to their needs (62%) and lack of personalized experience (59%)
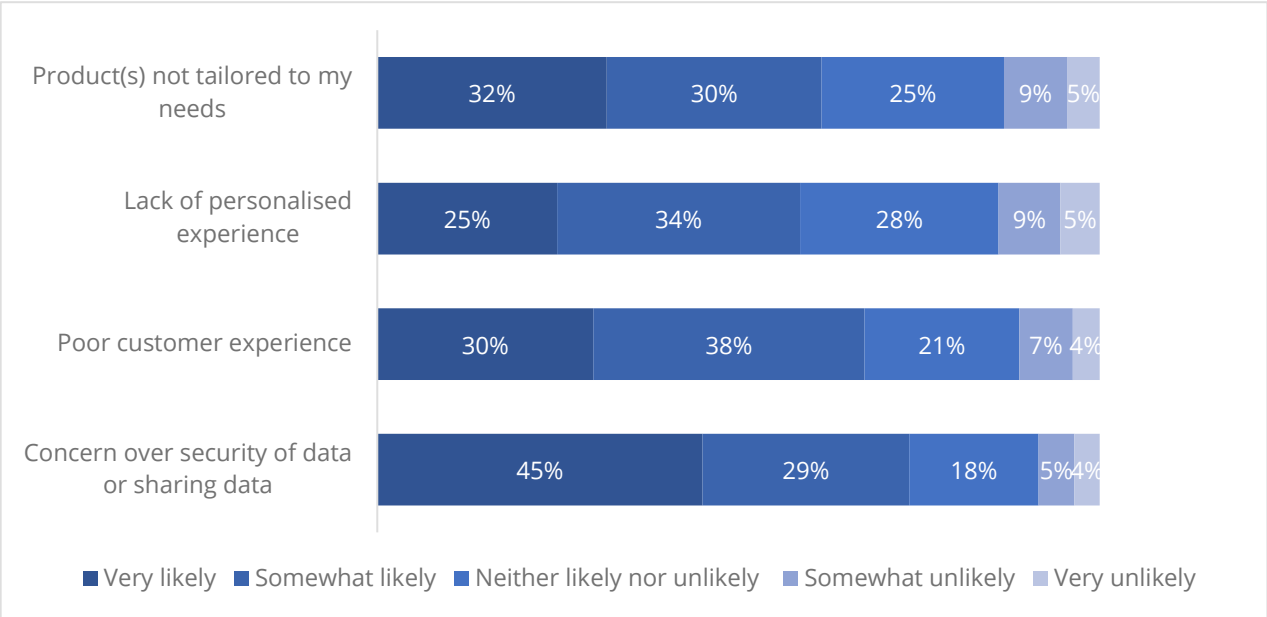
Figure 25 – US consumer results (Base n = 2000)

Q10. Which of the following factors encourage you to continue using a brand's product or service? Select all that apply.

While *product affordability* tops the charts on both sides of the Atlantic *(Figure 26)*, it's considerably more important to UK consumers than US consumers (68% vs. 48%). *Excellent service* (55% UK & 43% US) and *product availability* (51% UK & 44% US) are the next most influential factors in securing a sale overall. However, US consumers are more likely to be retained if brands *understand their tastes and recommend relevant products/services* (44% vs. 21%), and the *shopping experience is made easy* (45% vs. 30%).

Figure 26 – UK and US consumer results (Base n = 4000)

Q11. To what extent do you agree or disagree with this statement? 'I like it when a brand advertises to me with a product or service I want as it saves me the time to look for it'

Given that US consumers expect a personalized experience, it's no surprise that a greater proportion of customers stateside like being shown personalized ads *(Figure 27).* A substantial 74% strongly agree or somewhat agree, compared with just 43% in the UK. US consumers are, in fact, more than four times as likely to strongly welcome personalized ads as their UK brethren (38% vs. 9%).
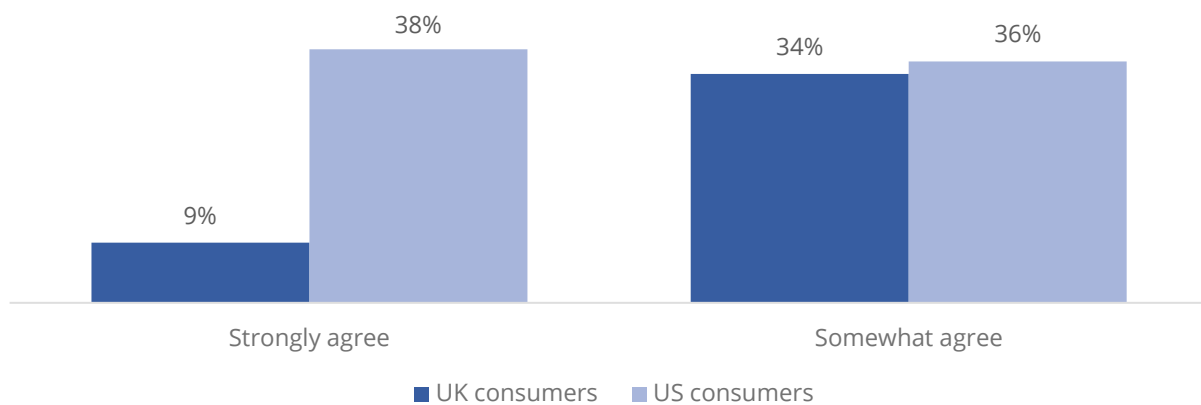
Figure 27 – UK and US consumer results (Base n = 4000)

Q12. How likely or unlikely are you to buy something after you see an advert or email from a brand of a product/service you have been browsing recently but haven't yet bought?

US consumers are more likely to respond to remarketing tactics, with 28% saying they *strongly agree* they would buy something after seeing an advert for a product they had previously browsed, versus just 7% in the UK *(Figure 28).* That rises to 66% in the US and 35% in the UK when we add in the percentage of consumers who said *somewhat likely*.
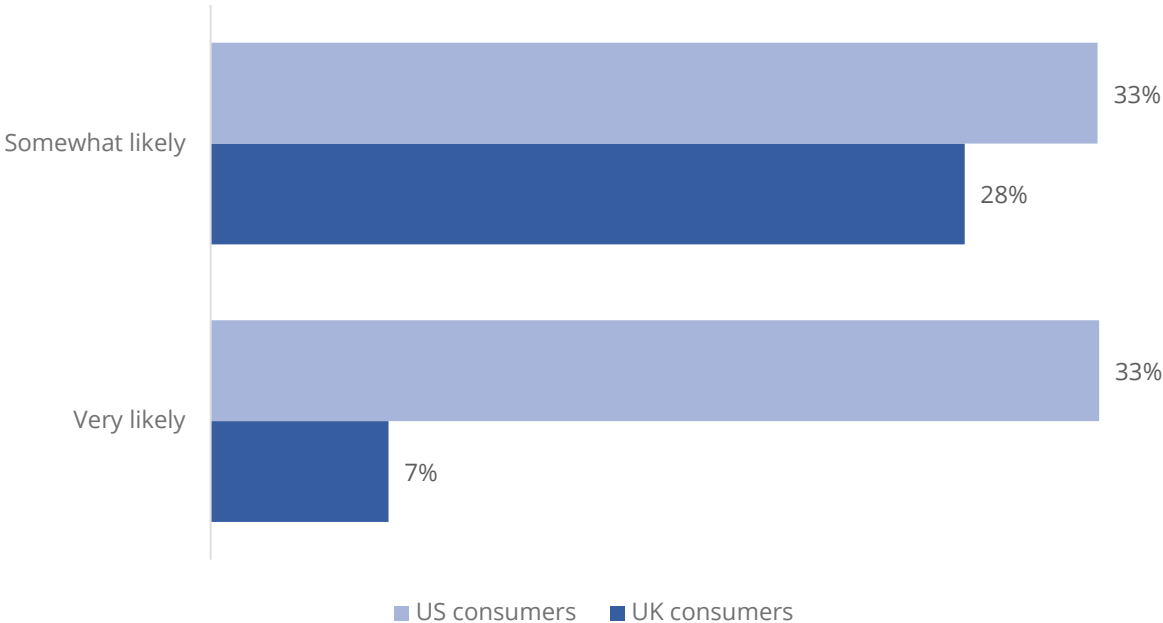
Figure 28 – UK and US consumer results (Base n = 4000)

Q13. Do you feel that the brands you use understand your shopping needs?

UK consumers are well over twice as likely to say they don't know if brands understand their shopping needs (40% vs. 16%). Interestingly, US consumers are both more likely to state that brands know them (51% vs. 35%) and don't know them (33% vs. 25%) *(Figure 29)*.
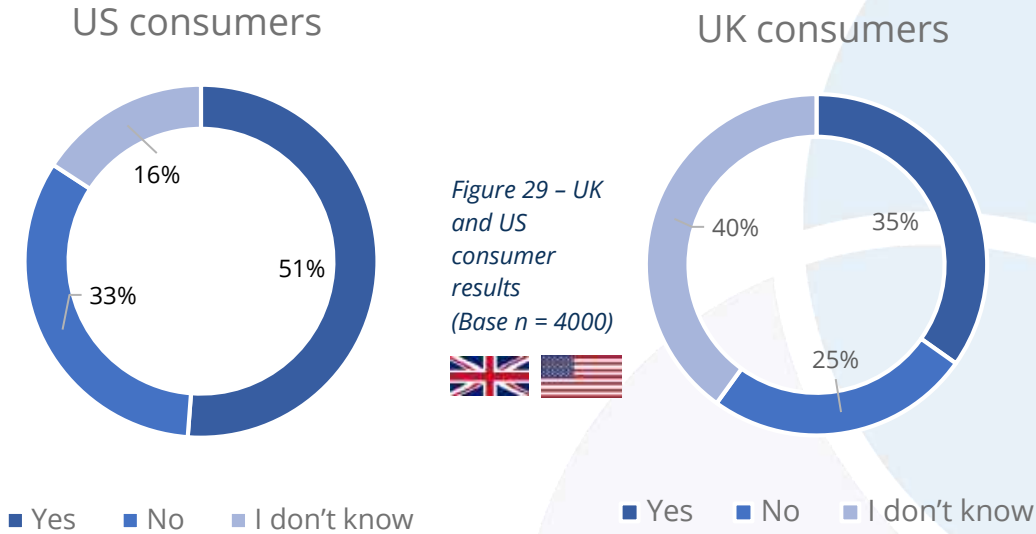

US consumers

16%
51%
33%

■ Yes ■ No ■ I don't know

Figure 29 – UK and US consumer results (Base n = 4000)

UK consumers

35%
40%
25%

■ Yes ■ No ■ I don't know

Q14. If you were to share your personal data in order to improve your shopping experience, would you prefer to share it directly with a brand you trust, or with a tech giant, such as Facebook or Google?

Unsurprisingly, consumers on both sides of the Atlantic would prefer to share their data directly with a brand than with a tech giant *(Figure 30)*.

In the UK, 37% would like their data to go to the brand directly rather than a tech giant (11%), while in the US they answered 52% v 26%, respectively. In fact, 36% of UK consumers also said they'd prefer not to have to share their data with either the brand or the tech giant, versus just 12% in US.
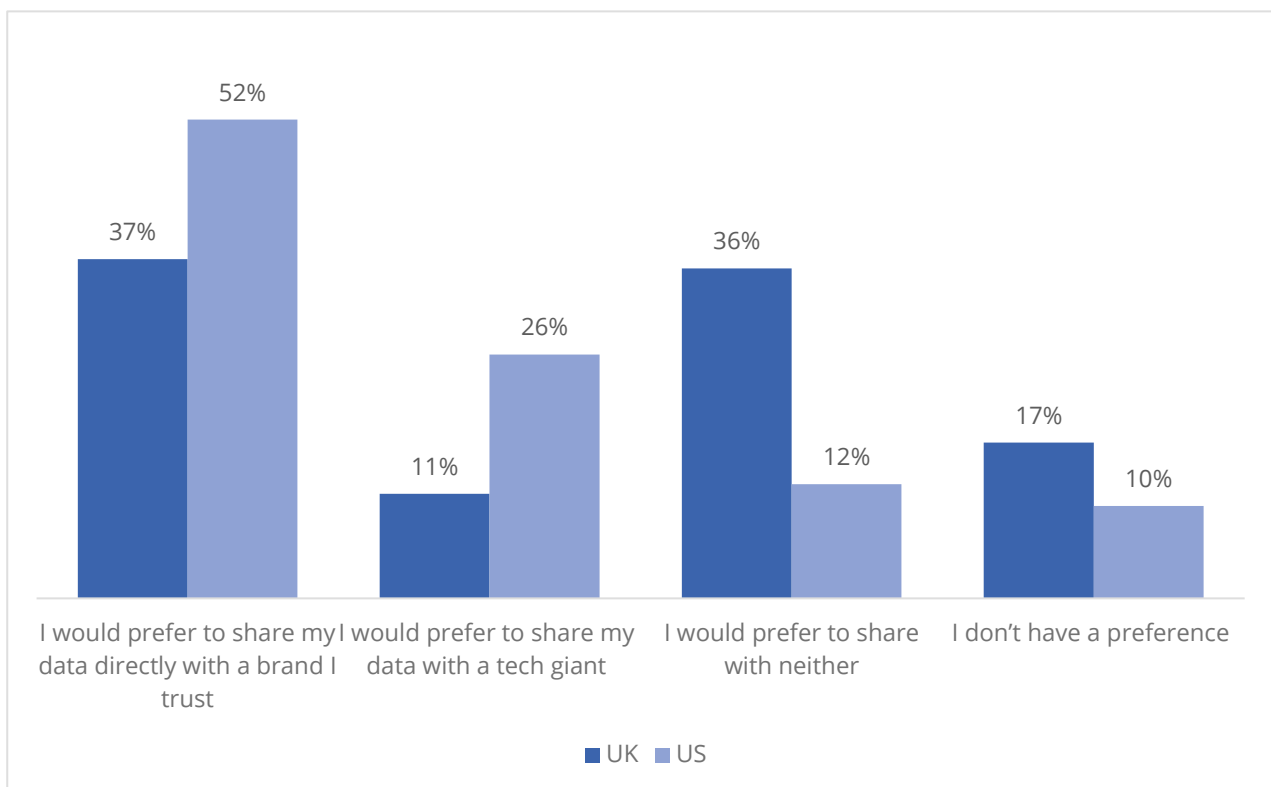
Figure 30 – UK and US consumer results (Base n = 4000)

Q15. When you put a product in your online basket but do not purchase it immediately, in general how strong is your intention to buy it?

UK consumers use online baskets differently from US consumers, as US consumers are almost three times more likely to have a very strong intention of buying a product when they add to their basket (31% vs 11%).
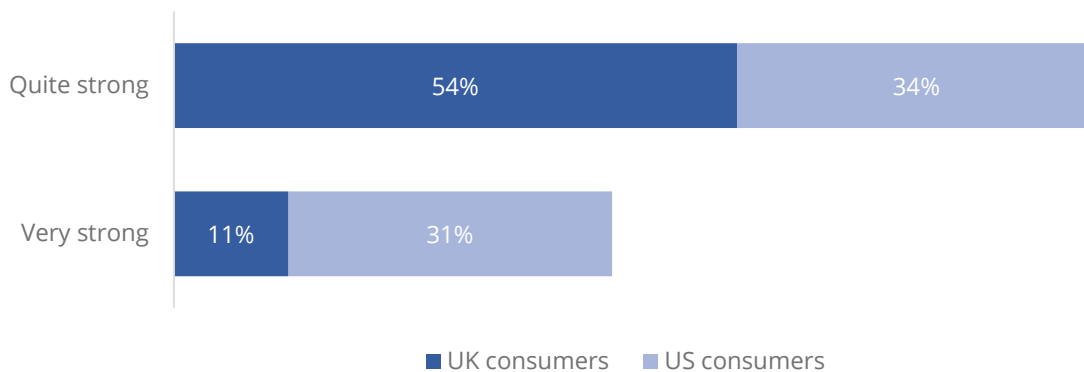

Figure 31 – UK and US consumer results (Base n = 4000)

Q16. When shopping/browsing what of the following do you find frustrating or helpful?

In the UK *(Figure 32)*, consumers mention popup notifications (47%), poor mobile websites (40%) and overly regular contact from a brand (39%) as causes of major frustration. They find it most helpful when they have clear ways to manage their communication preferences (27%) and when there are multiple options for payment (19%).
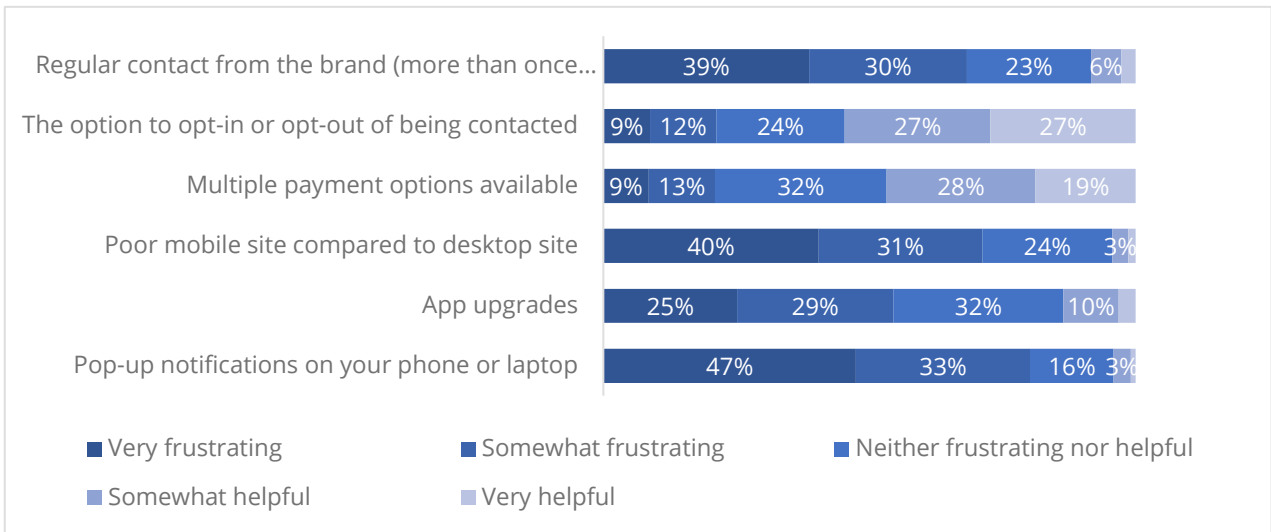
	Very frustrating	Somewhat frustrating	Neither frustrating nor helpful	Somewhat helpful	Very helpful
Regular contact from the brand (more than once…	39%	30%	23%	6%	
The option to opt-in or opt-out of being contacted	9%	12%	24%	27%	27%
Multiple payment options available	9%	13%	32%	28%	19%
Poor mobile site compared to desktop site	40%	31%	24%	3%	
App upgrades	25%	29%	32%	10%	
Pop-up notifications on your phone or laptop	47%	33%	16%	3%	

Figure 32 – UK consumer results (Base n = 2000)

In the US ***(Figure 33)***, consumers are also mostly frustrated by pop-up notifications (34%), poor mobile web experience (29%) and overly regular contact from a brand (22%). They find the same interactions helpful, such as having multiple payment options (20%) and the option to manage preferences (18%).

	Very frustrating	Somewhat frustrating	Neither frustrating nor helpful	Somewhat helpful	Very helpful
Regular contact from the brand (more than once…	22%	25%	28%	13%	12%
The option to opt-in or opt-out of being contacted	15%	21%	22%	24%	18%
Multiple payment options available	14%	23%	24%	19%	20%
Poor mobile site compared to desktop site	29%	24%	26%	13%	8%
App upgrades	17%	27%	32%	14%	10%
Pop-up notifications on your phone or laptop	34%	27%	19%	9%	10%

Figure 33 – US consumer results (Base n = 2000)

Section 2:

Marketer Results

A deep dive into the feedback from 4,000 consumers across US and UK to find out how well businesses are engaging with them, and the preferred channels they use to interact with brands.

Q1. Which of the following marketing channels do you currently use to interact with your customers?

In the UK *(Figure 34)*, *Facebook* is the top channel that marketers admitted they use to interact with customers with 59% of responses. *Instagram* closely follows this at 57%, and *mobile apps*, *Twitter,* and *email*, all at 56%.

Channel	Actively using	Not actively using, but planning to use in the future
Facebook	59%	33%
Instagram	57%	36%
Mobile app	56%	32%
Twitter	56%	38%
Email	56%	37%
In store/In branch	55%	34%
YouTube	53%	36%
SMS/text messaging	52%	38%
Direct mail	51%	39%
Telephone/Call center	50%	36%
TV advertising	49%	40%
Newspaper/magazine print ads	48%	42%
Google display advertising	48%	42%
Linkedin	46%	44%
Catalogue	46%	40%
Radio	42%	45%
Google PPC advertising	38%	52%
Internet connected speakers	38%	52%
VOC/Surveys	38%	44%
Chatbots/Live chat services	37%	47%
TikTok	30%	34%

■ Actively using　　■ Not actively using, but planning to use in the future

Figure 34 – UK marketer results (Base n = 250)

Least used were *Tiktok* (30%), *Chatbots* (37%), *Voice of Customer (VOC) programs* (38%), *Internet connected speakers* (38%) and *Google PPC* (38%).

Of the UK marketers not currently using these channels, the interaction methods they are considering most are *Google PPC* (52%) and *Internet connected speakers* (52%). *Chatbots* (47%), *Radio* (45%) and *VOC programs* (44%) complete the top five channels being planned for by UK marketing teams.

Channel	Actively using	Not actively using, but planning to use in the future
Email	66%	30%
Mobile app	64%	32%
Instagram	60%	34%
YouTube	60%	36%
Facebook	58%	38%
TV advertising	56%	40%
Linkedin	55%	40%
SMS/text messaging	55%	35%
In store/In branch	55%	38%
Direct mail	54%	40%
Newspaper/magazine print ads	51%	41%
Telephone/Call center	46%	46%
Internet connected speakers	46%	46%
Twitter	45%	48%
Radio	44%	44%
Catalogue	40%	50%
Chatbots/Live chat services	40%	53%
Google PPC advertising	39%	56%
Google display advertising	38%	59%
VOC/Surveys	37%	52%
TikTok	27%	34%

■ Actively using   ■ Not actively using, but planning to use in the future

Figure 35 – US marketer results (n = 250)

In the US, *(Figure 35)* *email* is the most popular channel for marketers to interact with their customers (66%). Second to this is *mobile apps* (64%), then *Instagram* (60%) and *YouTube* (60%) followed by *Facebook* (58%)

Compared with their UK counterparts, US marketing teams are mostly planning to invest in Google display advertising (59%) rather than Google PPC, however, Google PPC (56%) also appeared for US marketers as a close second. Chatbots (53%), VOC programs (52%), and catalogs (50%) complete the top five channels being planned for by US marketing teams.

Q2. To what extent do you agree or disagree with the following statement? 'Our marketing team is able to deliver a consistent and personalized offer or message across three or more marketing channels'.
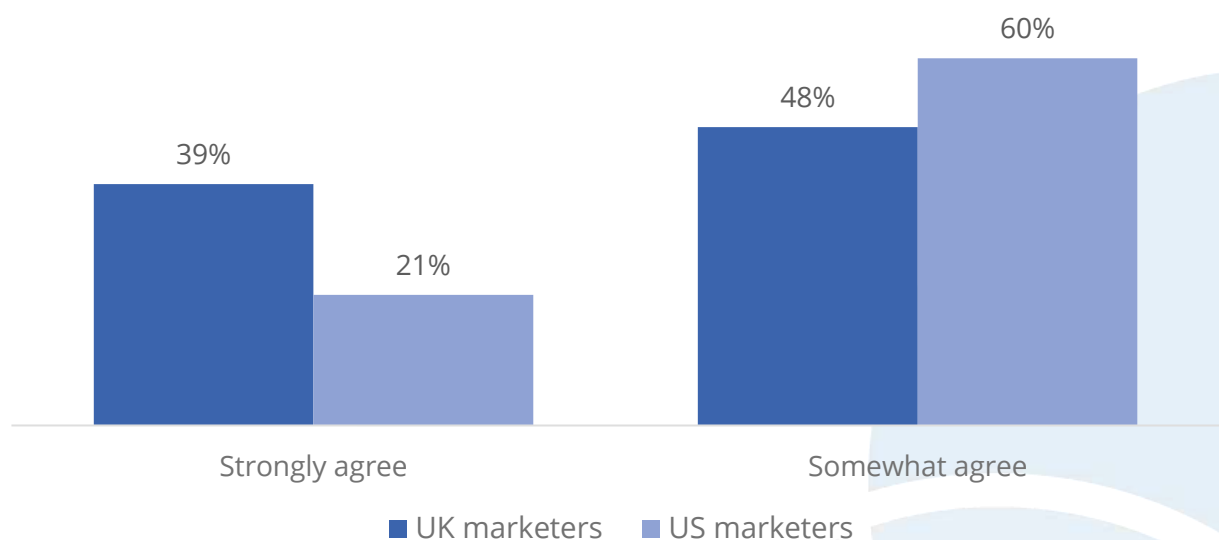
Figure 36 – UK and US marketer results (Base n = 500)

A whopping 88% of UK marketers agreed with this statement *(Figure 36)*, of which 39% strongly agreed. In fact, only 1% of marketers strongly disagreed with it. However, unfortunately for them, this doesn't reflect their customer's' feelings, with only 12% of UK consumers *(Figure 18)* saying that they feel like brands provide a similar shopping

experience across all the places they browse/shop all the time (this rises to 55% for some of the time). This means that brands are three times as likely to believe that they are delivering an omnichannel customer experience than they are in reality. This should be an area of concern for UK marketers as 33% of UK customers said that the lack of personalized experience is likely to stop them from buying a product or service online and in store.

Overall, fewer US marketers agree with this statement versus their UK counterparts, of which only 21% strongly agree. No respondents disagreed with this statement. US marketers seem more aligned with their customers however, with 41% of US consumers *(Figure 19)* saying that they feel like brands always deliver a consistent shopping experience across all channels.

This highlights that US marketers are ahead of their UK peers at delivering an omnichannel customer experience to their customers. However, there still remains a large disparity between what marketers believe they are achieving versus what consumers think. With 58% of US consumers *(Figure 23)* saying that the lack of personalized experience is likely to stop them from buying a product or service online (59% in store), personalization is one area where US marketers cannot afford to be complacent.

Q3. To what extent do you agree or disagree with the following statement? 'Our marketing team has all customer data, interactions and transactions integrated into a single data source (AKA Single Customer View (SCV))'

79% of UK marketers agree with this statement *(Figure 37)*, of which 35% strongly agree versus just 6% of those who disagree, and 0% who strongly disagree. However, from the consumer research on page 20, only 12% of UK consumers feel that the brands they use provide a similar shopping experience across channels *(Figure 18)*, raising concerns over whether or not these UK marketers 1) actually have an SCV and if so, 2) are using their SCV correctly?!
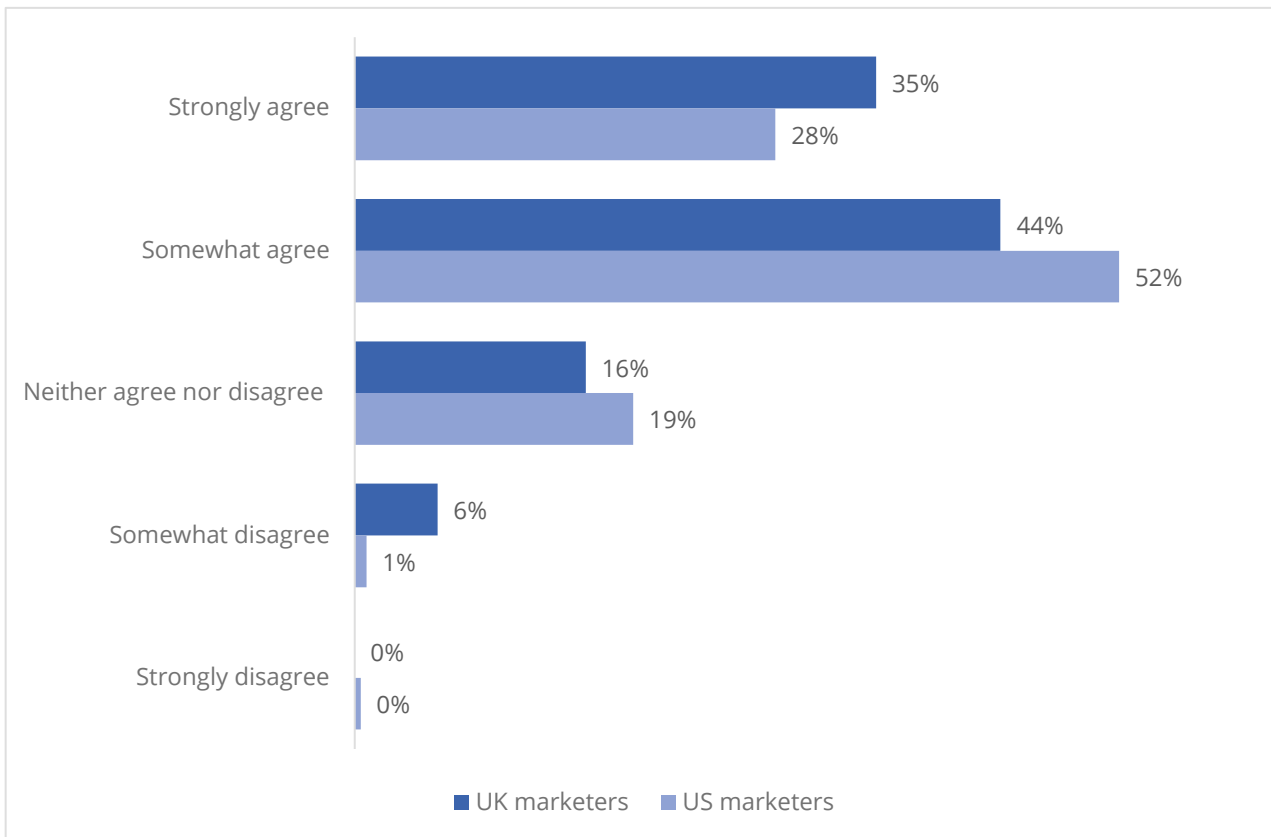
Figure 37 – UK and US marketer results (Base n = 500)

80% of US marketers agree with this statement too, yet the percentage of those who strongly agree drops to 28%, versus 35% in UK. Looking back to our US consumer data *(Figure 29)*, a third (33%) said that they felt the brands they use don't understand their shopping needs.

Q4. Which of the following do you find most effective in your business for acquisition and customer retention? (Select up to 5 options.)

For acquisition and retention, UK marketers predominantly rely on email and TV advertising (at 32% each), closely followed by YouTube (31%) and direct mail (29%) *(Figure 38).* Interestingly, no form of mobile advertising is listed in their top five channels, with only 23% opting for mobile apps and 19% for SMS/text messaging.

However, 40% of UK consumers admitted they have considerably increased the amount they shop on their mobile phone in the last year, highlighting a potential need for UK marketers to consider their mobile strategy. With just 23% of UK marketers answering that mobile apps are an effective channel for customer acquisition and retention, it suggests that marketers aren't capitalizing on the full benefits of mobile commerce to drive sales.
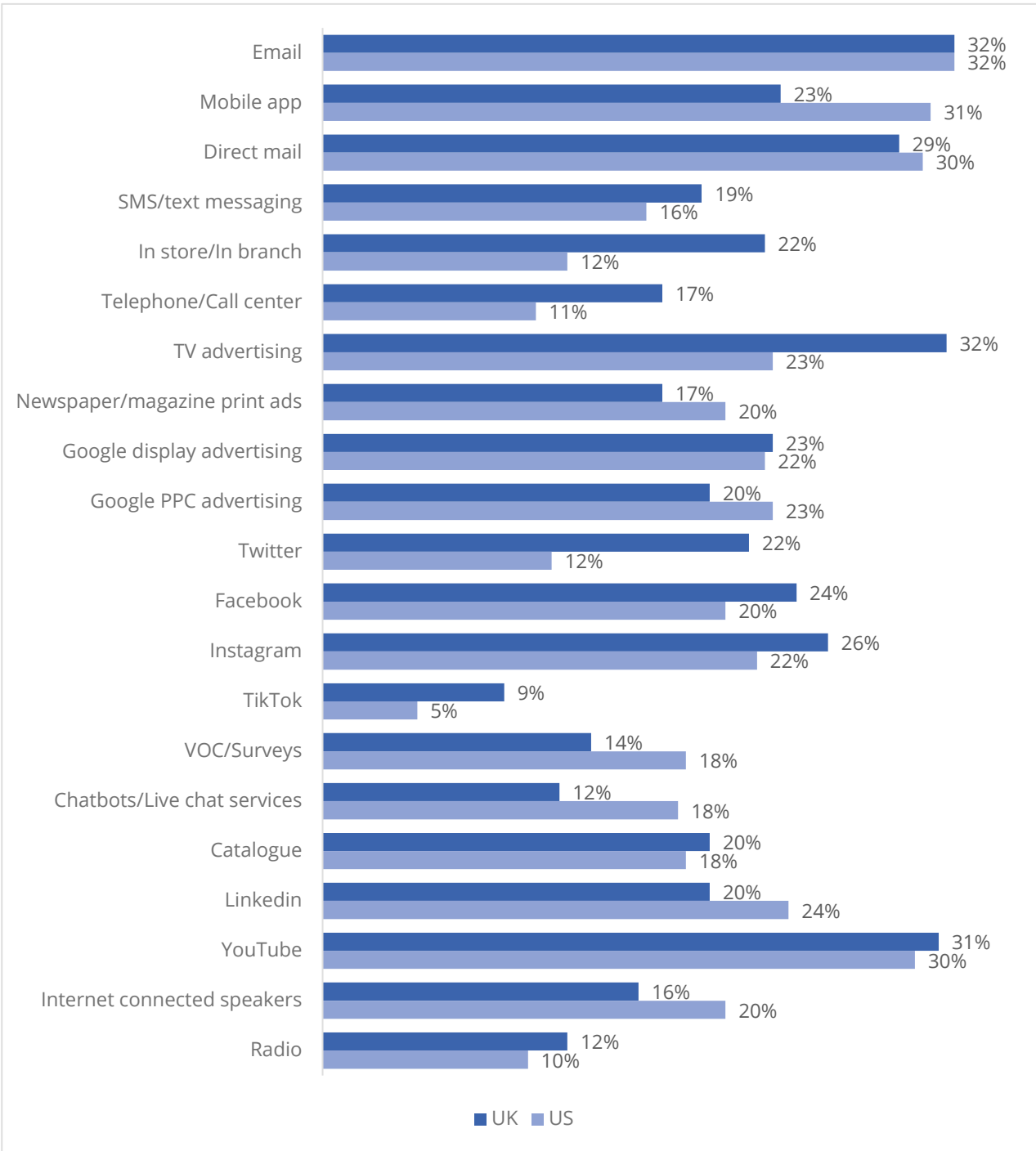
Figure 38 – UK and US marketer results (Base n = 500)

According to US marketers, email is the most effective channel for acquisition and retention at 32%. This is followed by mobile app (31%), and direct mail, and YouTube, both at 30%.

Q5. To what extent do you agree or disagree with the following statement? 'The marketing team is able to create very targeted audiences and segments for our outbound marketing campaigns'

A high number of UK marketers (86%) agreed with this statement, with no respondents disagreeing **(Figure 39).** Of the 86% that agreed, 32% of UK marketers strongly agreed.
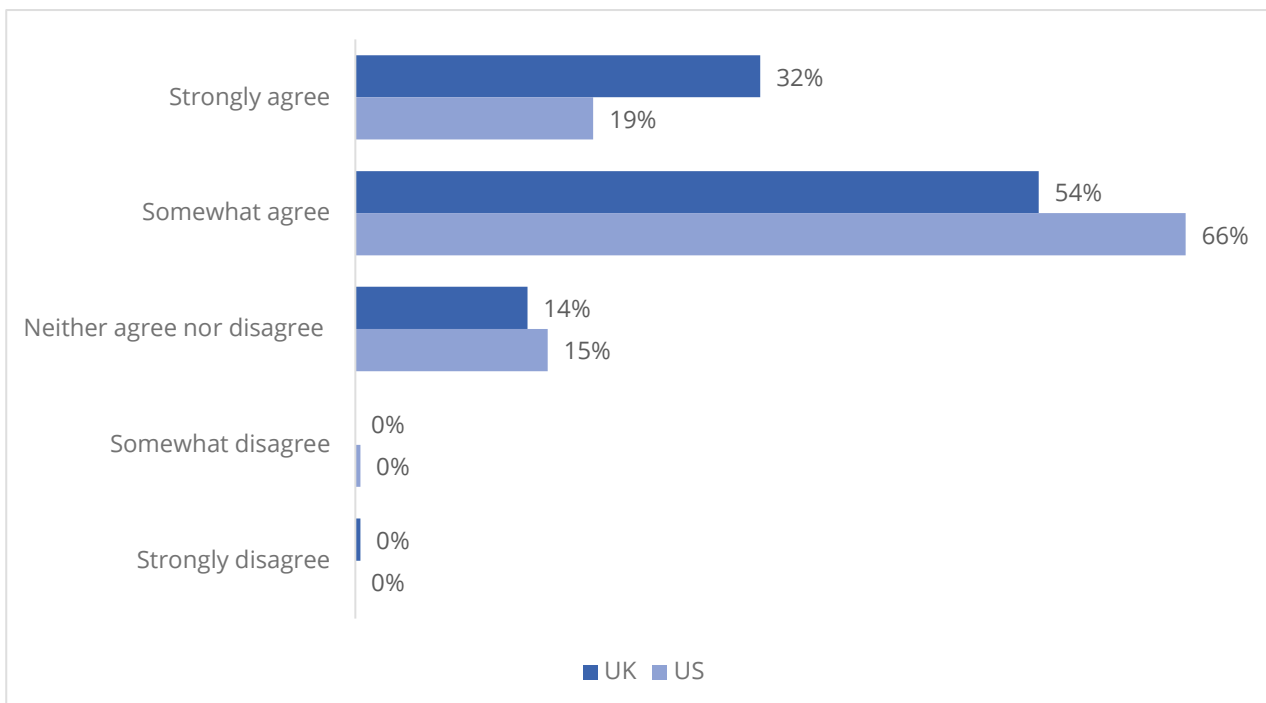
Figure 39 – UK and US marketer results (Base n = 500)

85% of US marketers either strongly (19%) or somewhat (66%) agreed with this statement.

While the percentage of marketers in UK and US agreeing with the statement is almost equal, it's surprising to see that the percentage of US marketers who strongly agree with this statement (19%) is significantly lower than in the UK (32%). This is perhaps confounded by the fact that US consumers are generally more likely to use a higher number of channels to interact with brands, making segmentation of audiences much harder.

Q6. To what extent do you agree or disagree with the following statement? 'The marketing team lacks the knowledge or skills to effectively analyze and segment customer data'

Worryingly, nearly two-thirds (64%) of UK marketers *(Figure 40)* somewhat or strongly agreed with this statement, with only 16% disagreeing, and yet 86% of the same UK marketers *(Figure 39)* agreed that their marketing team can create very targeted audiences and segments for their outbound campaigns. If this is true, the research suggests that marketing teams rely on other departments to help analyze and segment customer data.
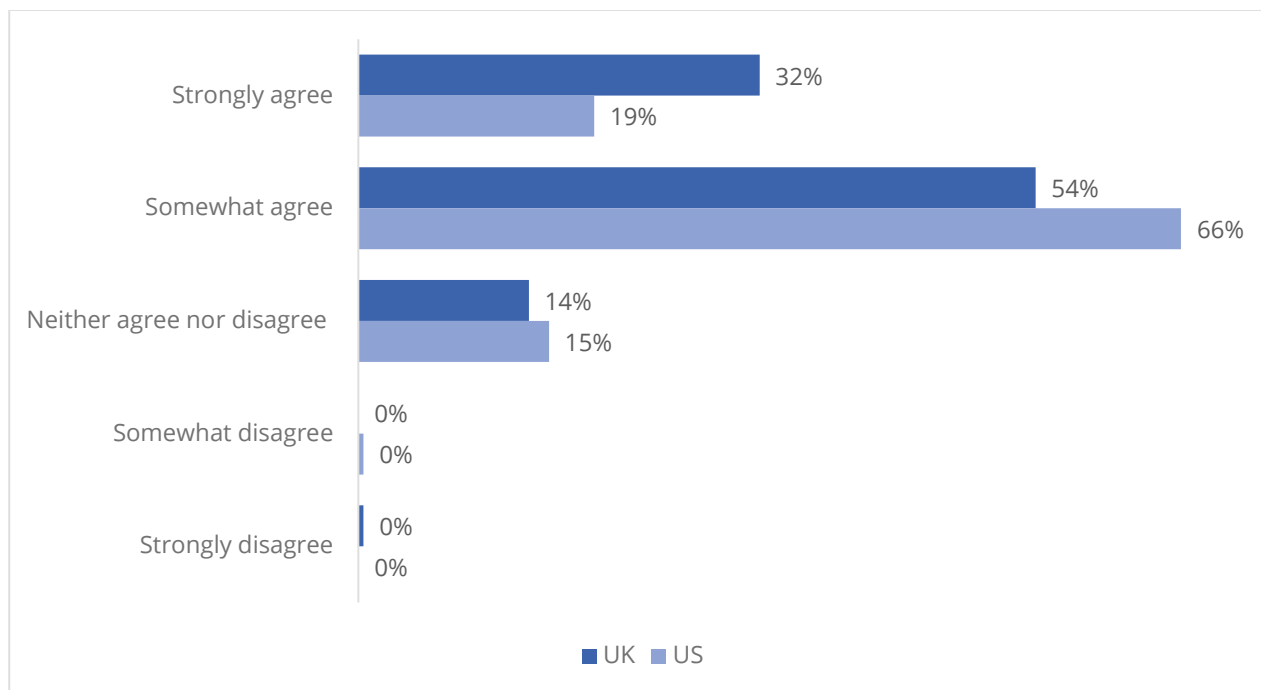
Figure 40 – UK and US marketer results (Base n = 500)

68% of US marketers agree that their team cannot effectively analyze and segment customer data, with those disagreeing at only 12%. In a similar way to the UK results, these figures suggest that US marketers also have to rely on other departments to analyze their data.

Q7. How effective or ineffective do you find email marketing for your business?
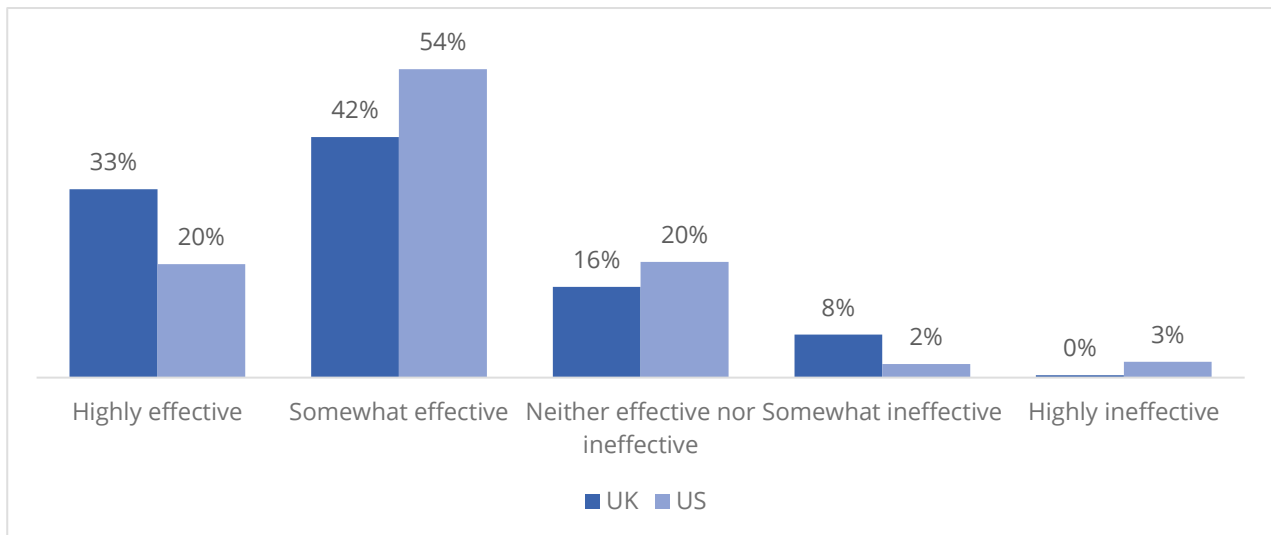
Figure 41 – UK and US marketer results (Base n = 500)

Of the UK marketers surveyed, 33% thought email marketing was highly effective for their business *(Figure 41),* with an additional 42% stating that it was somewhat effective. Interestingly, only 8% thought it was somewhat ineffective.

The percentage of marketers who thought email marketing was highly effective dropped to just 20% in the US results, which is surprising given that 32% of US marketers thought it was an effective channel for customer retention and acquisition *(Figure 38)*, and 66% stated they were actively using this channel to interact with their customers (the top-rated channel) *(Figure 35)*.

Q8. How do you think the effectiveness of email marketing for your business is changing?

Just under half (44%) of respondents in the UK thought that the effectiveness of email marketing is increasing *(Figure 42).* However, 45% thought its effectiveness stayed the same and 9% thought its effectiveness was decreasing.
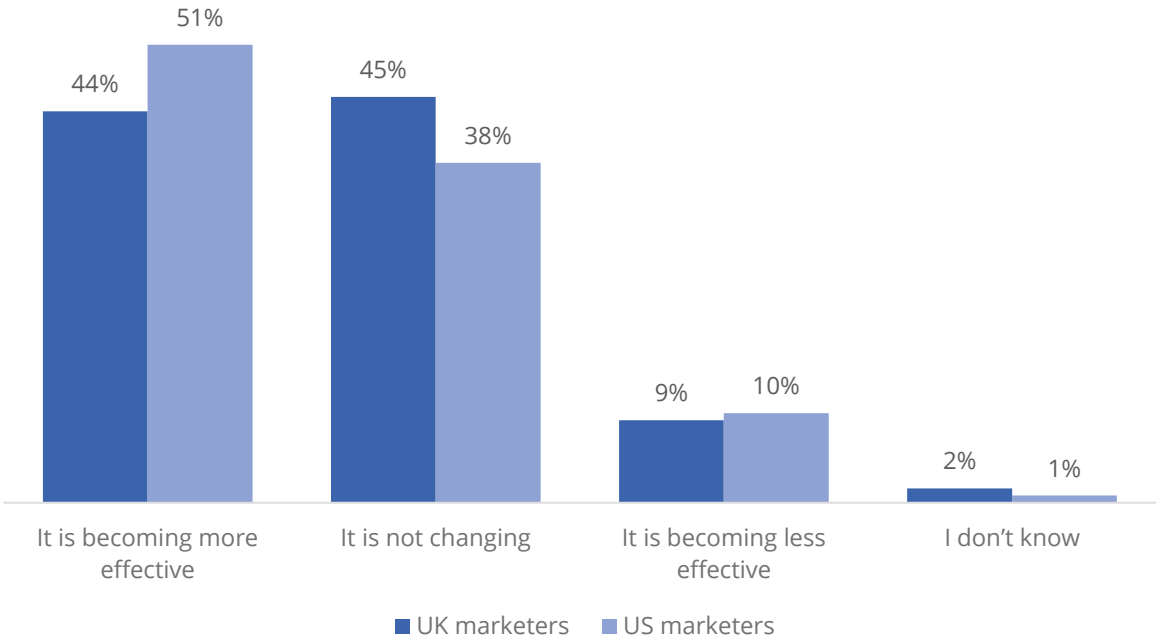
Figure 42 – UK and US marketer results

At 51%, more US marketers think the effectiveness of email marketing is increasing versus UK marketers, with 10% thinking its effectiveness is decreasing.
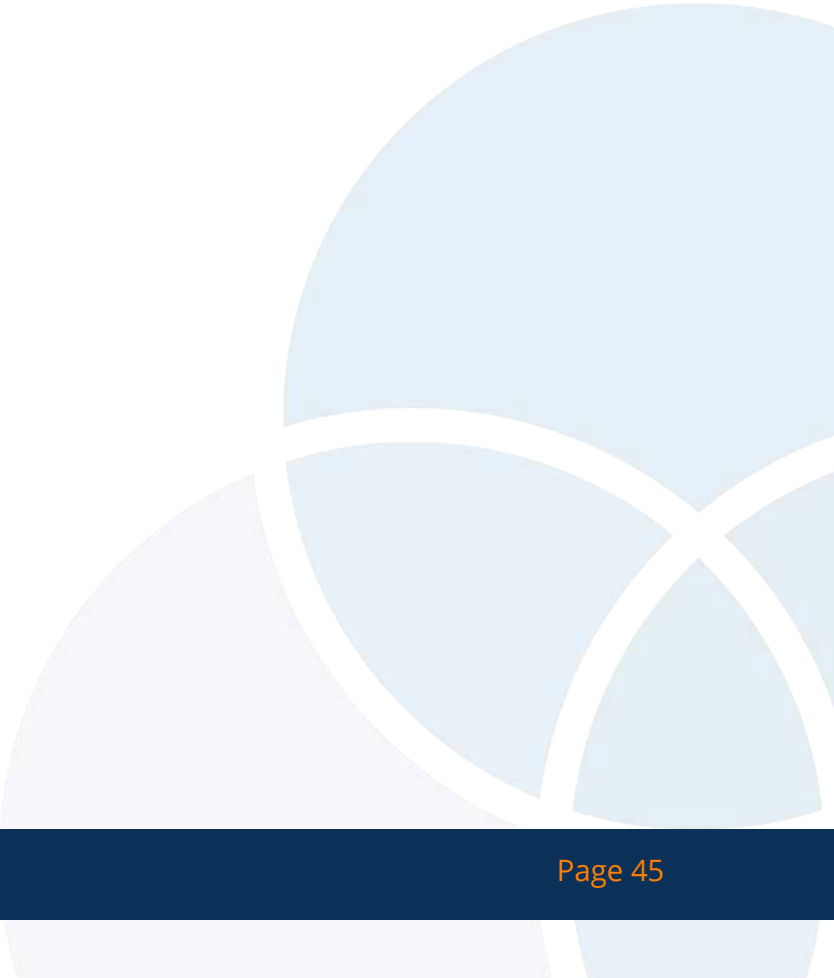
Q9. If any, what is your biggest barrier to enabling your marketing team to fully personalize the offer/content in a marketing message to an individual?
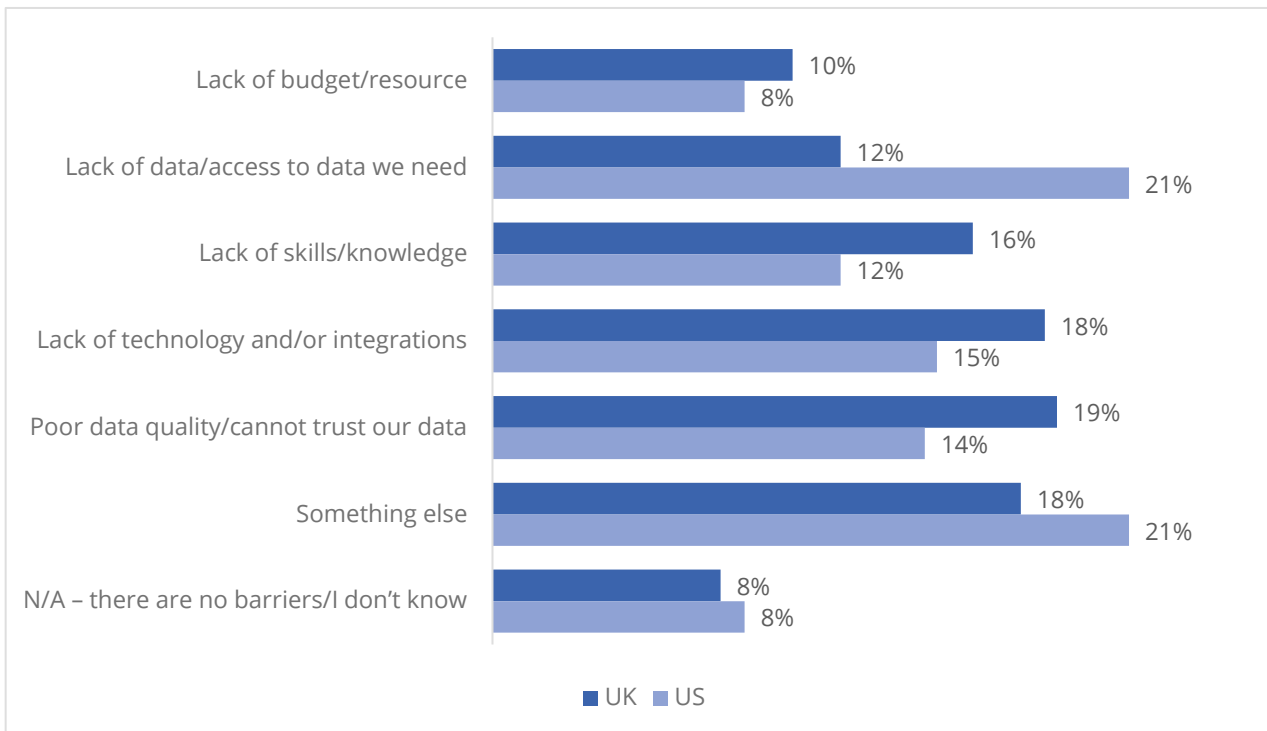

Figure 43 – UK and US marketer results (Base n = 500)

UK marketers cited poor data quality (19%) and a lack of technology/integrations (18%) as their biggest barriers for personalized messaging *(Figure 43)*.

Over two fifths of US marketers however admitted that a lack of data access (21%) was the main barrier for them.

Q10. Within your company, how well integrated with other technologies are the following marketing technologies?

For UK marketers, marketing analytics (52%), email marketing (51%), and customer feedback (50%) are the three best-integrated marketing technologies **(Figure 44)**, with marketers saying that these technologies are fully integrated. These figures rise to 88%, 92%, and 92% respectively when we consider the 'somewhat integrated' responses.

Interestingly, 45% of UK marketers said that their Customer Data Platform (CDP) was fully integrated, and an additional 45% said that it was somewhat integrated, considering integration is the bread and butter of a CDP. However, 8% of marketers said that their CDP is not integrated with other technologies, which raises questions about the effectiveness of the use of their CDP.
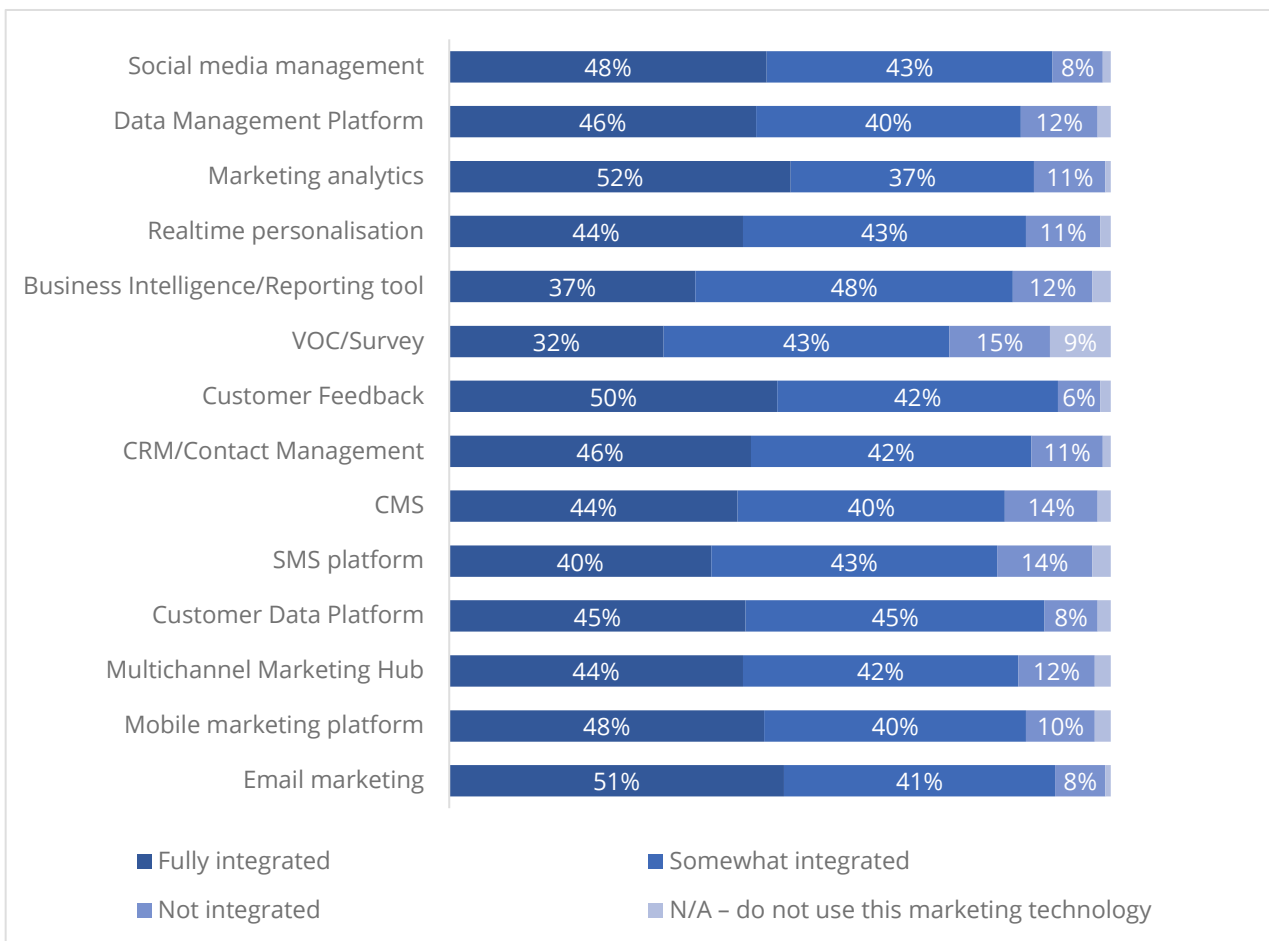
Figure 44 – UK marketer results (Base n = 250)

Marketing analytics tops the list for US marketers too, with 48% of marketers saying that their marketing analytics technology is fully integrated. SMS platform comes in second (47% fully integrated) and email marketing (46% fully integrated) in third. However, at 37%, less US marketers said their CDP is fully integrated, with 12% saying it is not integrated at all.

Q11. Which of these common sources of customer data is the marketing team using to refine campaign audiences/customer segments and inform wider marketing decisions?

The most common source of customer data used by UK marketers is a CRM, at 50%, followed by eCommerce data at 45%, and product data at 42% *(Figure 45)*. Only 32% said that web behaviors and email platform data is used.
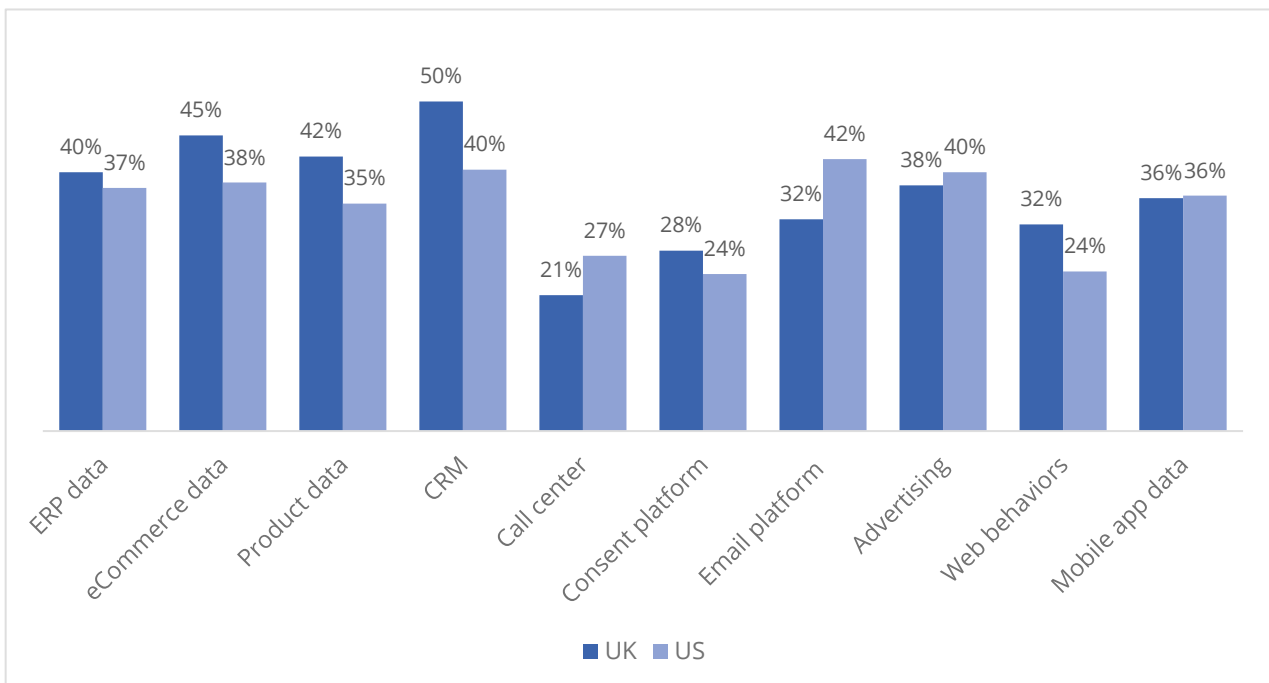
Figure 45 – UK and US marketer results (Base n = 500)

Whereas the US also considers CRM one of the top data sources used to inform marketing decisions (40%), this is second to email platform (42%). It's surprising to see that mobile data is further down the list, at just 36%, as mobile apps are considered one of the most effective channels for retention and acquisition in the US.

Q12. To what extent do you agree or disagree with this statement? 'It is a challenge to unify consumers' data to individual customers when so many have multiple digital identities'

In the UK, 27% of marketers strongly agree with this statement, with a further 56% somewhat agreeing *(Figure 46)*. Only 3% of marketers somewhat disagree with this statement, with none strongly disagreeing.

When we compare these results to those who said they had a Single Customer View (SCV) *(Figure 37)*, there seems a clear disconnect. 79% of marketers somewhat or strongly agreed they had an SCV, so they shouldn't be finding it difficult to unify their customers' data.
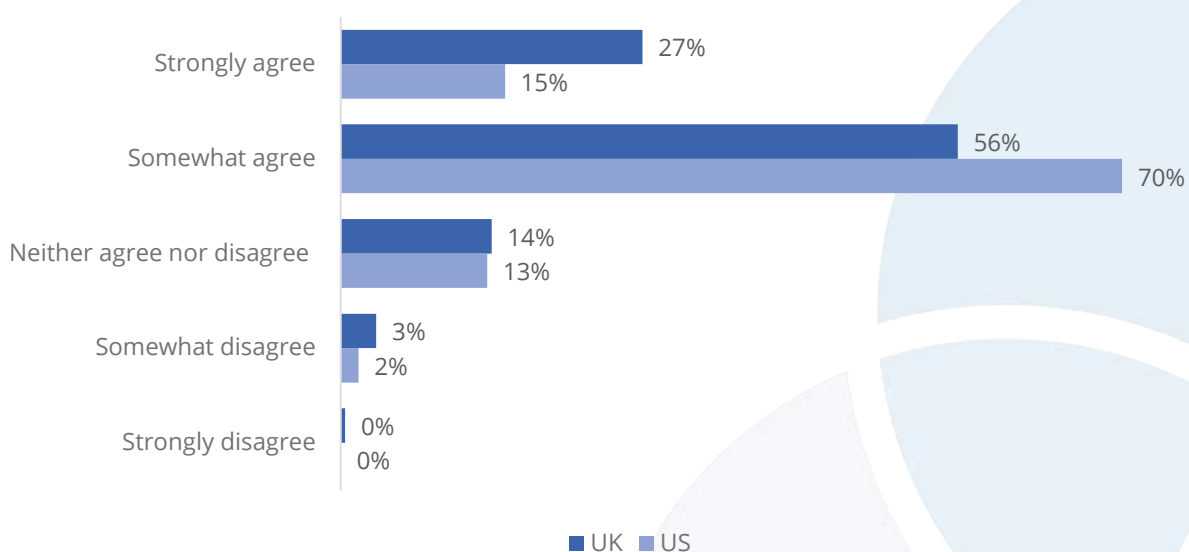

Figure 46 – UK and US marketer results (Base n = 500)

85% of US marketers agreed with this statement, of which 15% strongly agreed, while just 2% somewhat disagreed. However, given that 28% strongly agreed that their marketing team had all customer data, interaction and transactions integrated into a single data source, this also doesn't add up. In the same way as with UK marketers, it suggests that marketers don't have as accurate a picture of their customers as they think, and could be over-confident of their ability to create a unified Single Customer View.

Q13. Does your wider business have access to, and use, marketing data to help inform business decisions?

While it's great to see that a total of 94% of UK marketers said that their wider business has access to their marketing data *(Figure 47)*, it's concerning to see that a massive 42% say their business doesn't use it to inform business decisions, showing low customer-centricity within businesses (an additional 6% say that the wider business doesn't have access to it all).
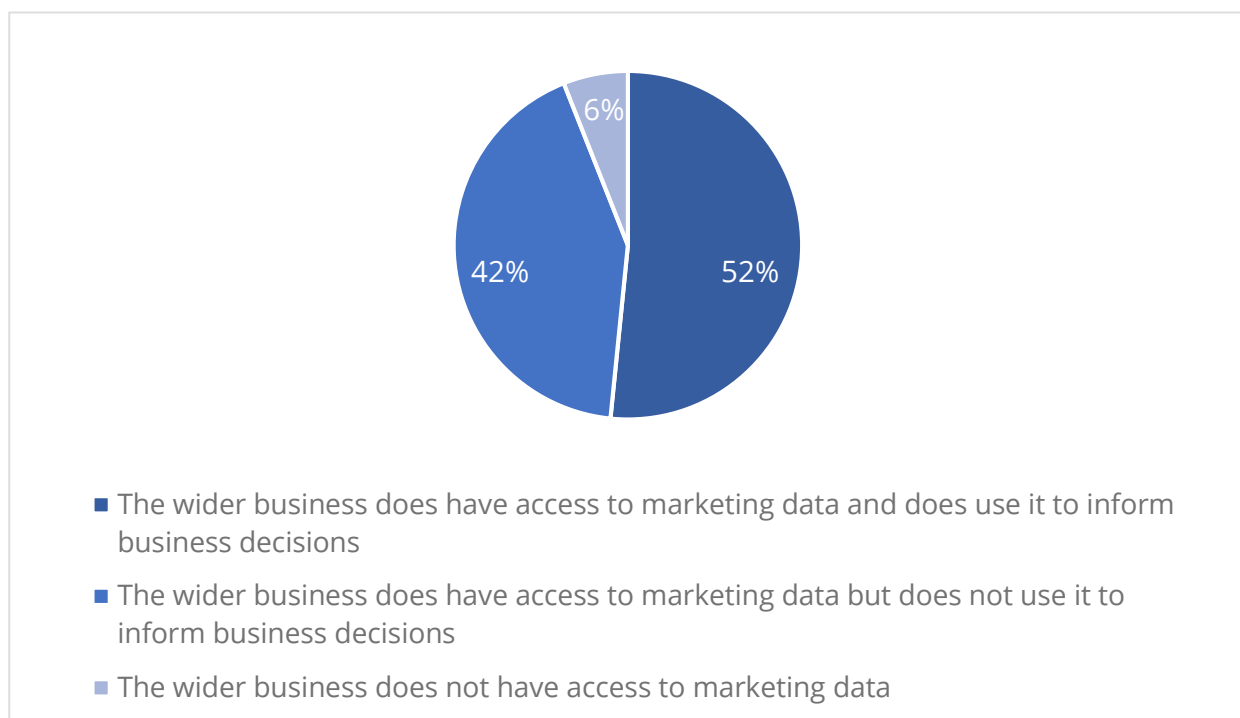

- ■ The wider business does have access to marketing data and does use it to inform business decisions
- ■ The wider business does have access to marketing data but does not use it to inform business decisions
- ■ The wider business does not have access to marketing data

Figure 47 – UK marketer results (Base n = 250)

The picture painted by US marketers is slightly more positive *(Figure 48)*, with the percentage of businesses who have access but don't use marketing data dropping to 37%, however, this is still significantly higher than it could be for brands wanting to shape experiences around their customers. The percentage of businesses who don't have access to the marketing data is 6%.
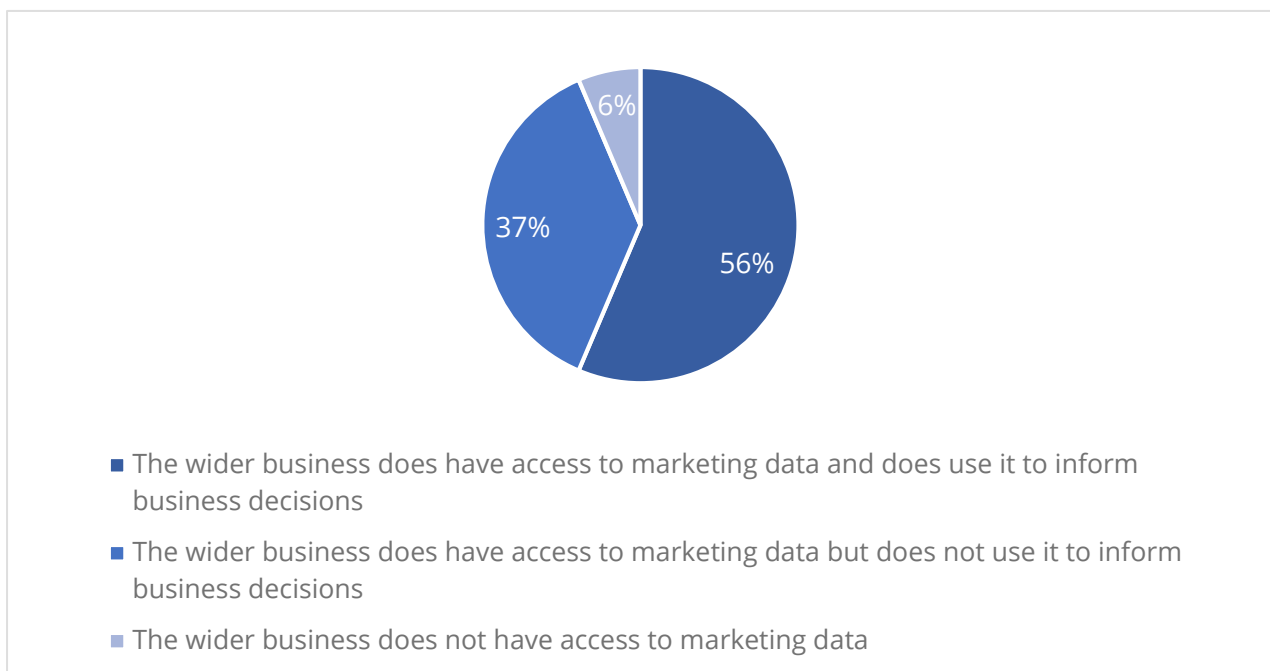

- The wider business does have access to marketing data and does use it to inform business decisions
- The wider business does have access to marketing data but does not use it to inform business decisions
- The wider business does not have access to marketing data

Figure 48 – US marketer results (Base n = 250)

Q14. Do you ask your customer database to opt out of potentially sensitive promotions, such as Mother's Day or Father's Day?

It's good to see that 42% of UK marketers *(Figure 49)* say that they offer the chance to opt out of sensitive promotions for all key dates, and that a further 47% do it for some, but not all, key dates. It's concerning that 9% don't offer this, either because they don't have the capabilities to execute this, or perhaps don't see the need to. Given the negative impact it could have on a customer's experience, and thus the higher the potential of them leaving a brand, this is therefore an area of concern for brands not providing an optimized preference center to collect a customers' interests.
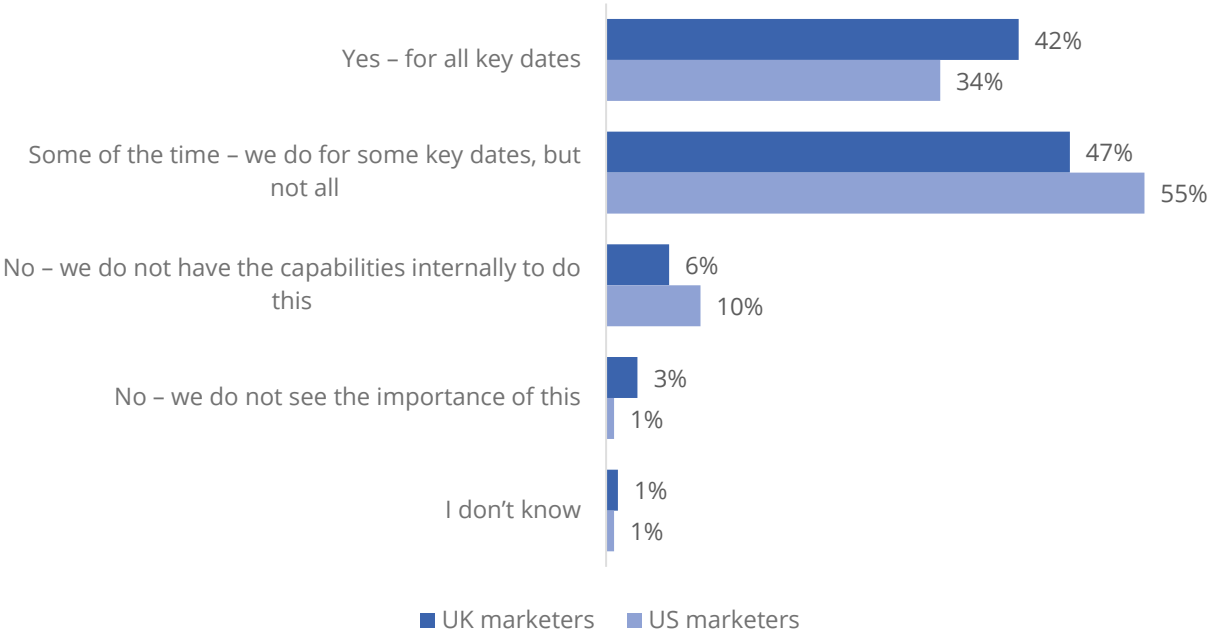
Figure 49 – UK and US marketer results (Base n = 500)

The number of marketers who offer the chance to opt of for all key dates drops to 34% in the US, yet rises to 55% for some, but not all. Again, it doesn't make any sense to offer it for some occasions but not others. The number of US marketers who don't offer this option rises to 11%, with 10% saying that they don't have the capabilities to execute this.

These findings are interesting compared with our consumer findings, as 55% of UK shoppers said that they'd find the option to opt-in or opt-out of being contacted helpful (of which 27% said it would be very helpful) *(Figure 32).* This drops to 42% in US consumers *(Figure 33)*. So, for the 9% of UK marketers and 11% of US marketers that don't offer this, it could negatively impact the way their customers view their brand.

Q15. Do you consistently collect and analyze feedback from your customers about any of the following...?

Figure 50 – UK marketer results (Base n = 250)

68% of UK marketers *(Figure 50)* collect, analyze, and use customer feedback on product satisfaction/feedback, yet an additional 30% say that they collect it, but don't put it to use.

What's surprising in the US results *(Figure 51)* is the amount of data that is being collected but not being used. US marketers aren't using a massive 45% of the data they collect on average, with this rising to 50% for information on a customer's personal likes and dislikes, and preferred channels.
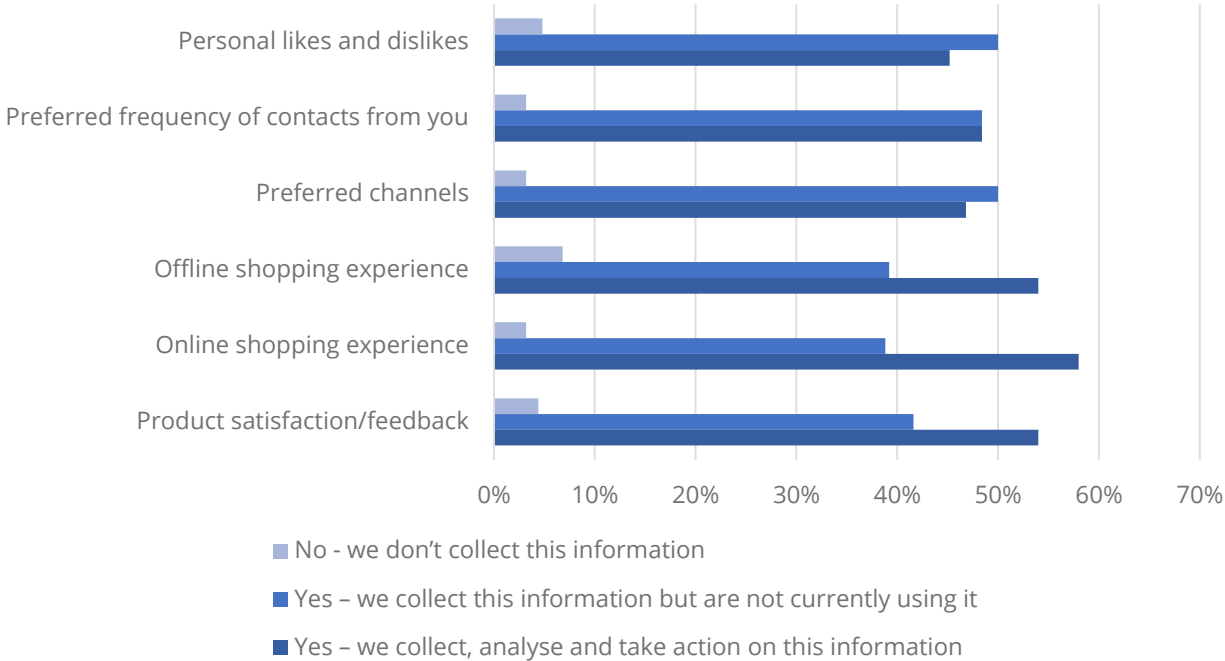
Figure 51 – US marketer results (Base n = 250)

Legend:
- No - we don't collect this information
- Yes – we collect this information but are not currently using it
- Yes – we collect, analyse and take action on this information

When examining the results for 'preferred frequency of contact', less than half (48%) of marketers in both the US and the UK collect, analyze, and take action on this data. However, our consumer results show that regular contact from a brand (more than once a day) is considered frustrating for consumers, with 22% of US and 39% of UK customers saying they find it 'very frustrating'.

This raises the question as to how marketers are delivering a personalized, customer-centric experience if they aren't taking their customers' preferences into account. Without this crucial information, it's impossible for marketers to deliver the right message, to the right person, on the right channel, at the right time.

Marketing takeaways

For marketers, our findings may not be welcomed, as our research shows multiple disparities between marketers' perception of their success and their customers. It's clear from our research that the increasing number of channels used by consumers is challenging for marketers, as they fail to identify the most effective channels to interact with them on and therefore, are placing too much importance on the wrong channels.

Understanding where and how consumers are browsing and/or shopping and acting upon that knowledge, will be key to unlocking their ability to create the personalized experiences their customers so clearly want and expect. In fact, over half (55%) of consumers surveyed said that a personalized shopping experience is important to them, yet only 27% thought that brands were providing them with a consistent experience all the time. This demonstrates the need for marketers to get personalization right. To do so, superior quality data and a strong and effective omnichannel marketing strategy will be key.

Solutions such as a Customer Data Platform (CDP) unify customers' online and offline data, and use this to create a clear, trustworthy, Single Customer View. This eliminates the challenges experienced by marketers as they attempt to unify consumers' data when they have multiple digital identities, something which 84% of marketers said they find challenging. With a Single Customer View (SCV), marketers can analyze their customer data and segments, and thus create targeted audiences for their omnichannel marketing campaigns.

Marketers also need to collect and use the information they've gathered in order to serve their customers better. A poor user experience (71.5%), lack of personalized experience (45.5%), and products not tailored to their needs (56%) are all issues that would stop a consumer from buying a product or service online or in store. Furthermore, 30.5% of consumers said that regular contact from brands (more than once a day) is very frustrating. Despite the significance placed on these factors by consumers, marketers are failing to act upon the data they collect relating to these areas.

To overcome this, marketers need to use their Voice of the Customer (VOC) data to make transformational decisions and improve how they interact with their consumers. By utilizing this data, marketers will be able to eliminate the disconnect between them and their consumers and therefore get a clearer understanding of their success. A CDP is essential in making the VOC data actionable across the various online and offline channels, and in enabling marketers to reach and interact with their customers more effectively.

About Upland BlueVenn

Upland BlueVenn provides marketers with all the analytics, predictive insight and omnichannel marketing automation capabilities they need. Powered by its Customer Data Platform, it unifies every customer interaction throughout time, from all devices and channels, and provides the ability for marketers to understand customer behavior like never before, while delivering personalized, real-time experiences that increase engagement and overall spend. Over 400 brands worldwide use its omnichannel marketing solutions.