

Accenture Interactive

Cutting across the CMO-CIO divide

Digital drives a new wave of collaboration



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Riding the digital wave—insights from marketing and IT leaders around the world

Executive summary

In the digital world, functional silos—no matter how efficient or leading edge—no longer work, and chief marketing officers (CMOs) and chief information officers (CIOs) are seeing the potential of collaboration. In the four years of leading this research, we've never seen CMOs and CIOs as interested in working together as they are now. A sea change is happening as more and more CIOs put marketing IT at the top of their agenda.



One reason says it all: "Marketing is more about digital now, which requires more technology."¹ This is the top explanation cited by marketing and IT leaders for greater alignment and interaction between two functions that have found it challenging to work together in the past. The ripple effect of digital disruption is giving rise to a more integrated enterprise centered on the customer experience.

These are some of the key findings from the Accenture Interactive 2014 CMO–CIO Alignment survey of over 1,100 senior marketing and IT executives from key countries and industries across the global economy².

Despite an improving IT relationship, there is still the need for CMOs to prioritize collaboration across the C-suite to help drive an integrated digital business. IT leaders are adapting faster to the teamwork necessary to truly transform the business and take advantage of digital opportunities. CIOs are more likely to see the big picture and drive the future relationship between the two functions.

Execution appears to be the culprit, as both Marketing and IT are challenged by rapidly shifting digital demands. To address this issue, some companies are hiring chief digital officers, who cut across silos to deliver integrated marketing IT solutions.

Surely this is a wake-up call for CMOs and CIOs alike to improve their implementation capabilities or take a radically different approach to using technology to drive marketing. The boundaries between Marketing and IT are increasingly blurred in the digital marketplace. CMOs that recognize the potential this presents will be able to work with their IT colleagues to benefit the entire business.

Based on our survey, four imperatives emerge for CMOs as they focus on building trust and improving alignment with IT:

1. Invest time in establishing a vision and collaborate with IT to bring it to life.
2. Unify around the customer experience to create a truly digital business.
3. Rethink the operating model to integrate customer-focused skills throughout the company.
4. Orient the marketing model and budget to align with a new ecosystem of marketing services.

Acting on these recommendations allows companies to surf the waves of high performance and achieve the ultimate goal of Marketing and IT collaboration: enduring customer relevance at scale through a customer-focused digital transformation.

¹ 2014 CMO–CIO Alignment survey, Accenture Interactive, June 2014; www.accenture.com/CMOCIOAlign

² All tables and research data provided in this report reference findings from this survey unless otherwise stated.

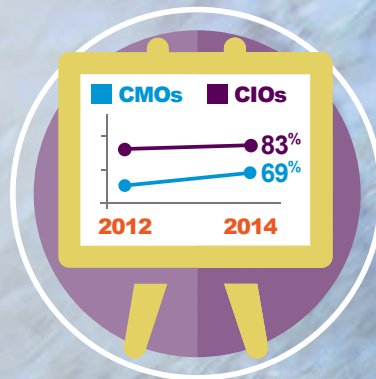
Digital closing the gap

No doubt about it: digital is driving the desire for more collaboration between senior marketing and IT leaders.

While CMOs and CIOs point to a number of reasons for more alignment and interaction, digital strategies top the list. The most-cited reason out of 17 options presented in the Accenture Interactive CMO–CIO survey is, "Marketing is more about digital now, which requires more technology." The next most-frequent responses are:

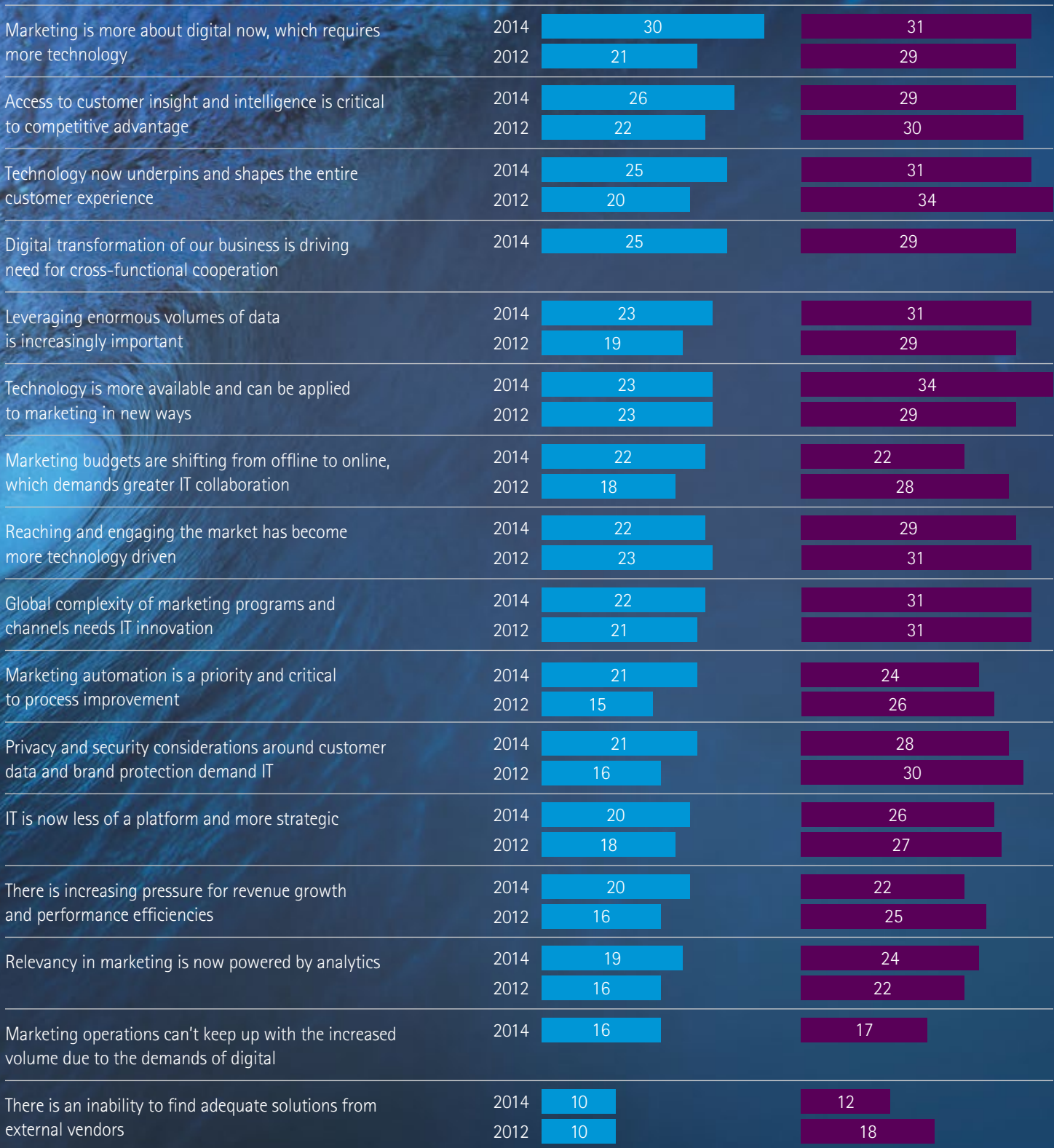
- "Technology is more available and can be applied to marketing in new ways."
- "Technology now underpins and shapes the entire customer experience."
- "Access to customer insight and intelligence is critical to competitive advantage."

Although the Marketing and IT functions still remain far apart on how much weight each puts on the need for collaboration and interaction, the gap is closing fast. This year 83 percent of IT executives say they need to align and interact with Marketing. While just 69 percent of their Marketing counterparts feel the same way, this 14-point difference is significantly smaller than 2012's 21-point gap (when agreement was 77 percent and 56 percent, respectively).



In 2014 69% of CMOs recognize the need to align with IT (56% in 2012) vs. 83% of CIOs (77% in 2012)

Reasons for greater CMO–CIO alignment

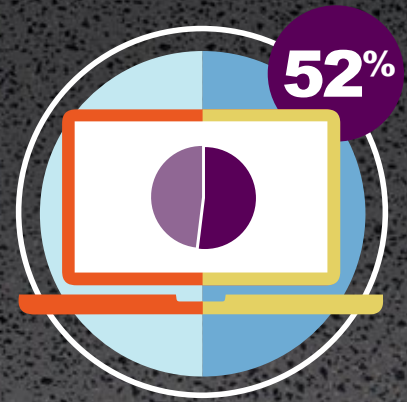


■ CMO ■ CIO

Aligning around marketing IT

It is obvious that there is a greater recognition of the importance of IT in marketing and vice versa. Indeed, CMOs have finally caught up with CIOs in placing a high priority on marketing IT rather than on more traditional budget items like advertising and creative. Some 52 percent of them put marketing IT at or near the top of their priorities—a 16-point jump over 2012. Meanwhile, more than half (53 percent) of CIOs put marketing IT at or near the top of their IT priorities (points four and five on a five-point scale). This represents an 8-point jump over just one year earlier. There is now only a 1-point gap on marketing IT priorities between the two functions.

Notably, alignment is linked to financial performance, with high-growth companies much more likely than others to acknowledge that marketing IT is a high priority within the overall IT organization (60 percent). But across the board, CMOs and CIOs are closely aligned on which marketing IT priorities make the biggest impact. Choosing from 26 options, their top 5 priorities are customer experience, customer analytics, social media, corporate website and other web development.

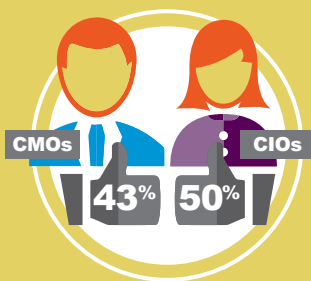


Over half of CMOs rank marketing IT at, or near, the top of their priorities

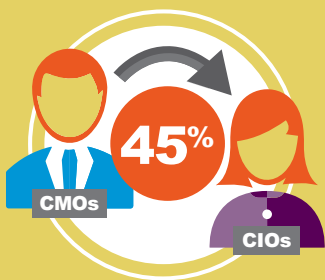


Coming unstuck on implementation

Despite agreeing on a common digital agenda, senior marketing and IT leaders are still struggling to work together well. While 43 percent of marketers and 50 percent of IT leaders think their relationship with the other has improved over the past year, less than one-quarter (23 percent) of marketers think the level of collaboration between CMOs and CIOs and their organizations is at or approaching the "right level" now. A full 45 percent³ of CMOs believe more collaboration is needed with the CIO—a 22-point gap.



The relationship has improved.



But more collaboration is still needed.

From the CMO perspective, confidence continues to decline among marketers in their IT departments' ability to keep pace with the evolving demands of marketing in a digital environment. This year there are at least 5-point increases in statements like "my IT team does not understand the urgency with which I need to integrate new sources of data to address market conditions" (40 percent vs. 34 percent) and "the technology development process is too slow and not aligned to the speed of digital marketing" (43 percent vs. 36 percent). The good news for marketers is that high-performing CIOs recognize this and are assiduously developing agile systems and operations that enable their organizations to adapt far more quickly³.

For their part, senior IT executives see some Marketing improvements over last year. Just 41 percent now say that "the Marketing department does not provide adequate levels of business requirements" (down 5 points), and 51 percent say their company's Marketing employees "understand technology" (up 3 points). At the same time, however, 43 percent of CIOs now believe that "marketing requirements and priorities change too often for us to keep up" (up 3 points).

There is no doubt that the pace at which Marketing needs to adopt new technologies will continue to increase, and both functions are seeking ways to bridge the collaboration gap. CMOs are bringing more digital talent in-house—including those with technology expertise—while continuing to rely on external agencies. CIOs are hiring more technologists with marketing experience. Some companies are taking a different tack altogether and hiring chief digital officers, to cut across traditional functional silos.

Chief digital officers disrupt the status quo

Respondents who identified themselves in the new role of chief digital officer (CDO) seem to be cutting across traditional functional boundaries to provide integrated marketing IT solutions. More than half (53 percent) of CDOs see no need to focus on integration between the Marketing and IT functions. In fact, CDOs are consistently less likely than their colleagues to see relationships with other C-level individuals and departments as important to their business priorities and strategic objectives.

Perhaps their lack of interest in integration stems from their reliance on using external technologies, like the cloud, and agencies or small technology providers to support many of their initiatives. By using next-generation marketing services, CDOs are buying services differently compared to traditional CMOs and CIOs, circumventing the silo issue entirely and focusing on making their company a digital business.

³ Accenture, "High Performers in IT: Defined by Digital," 2013; www.accenture.com/us-en/Pages/insight-digital-it-research.aspx

Perspectives on collaboration (%)

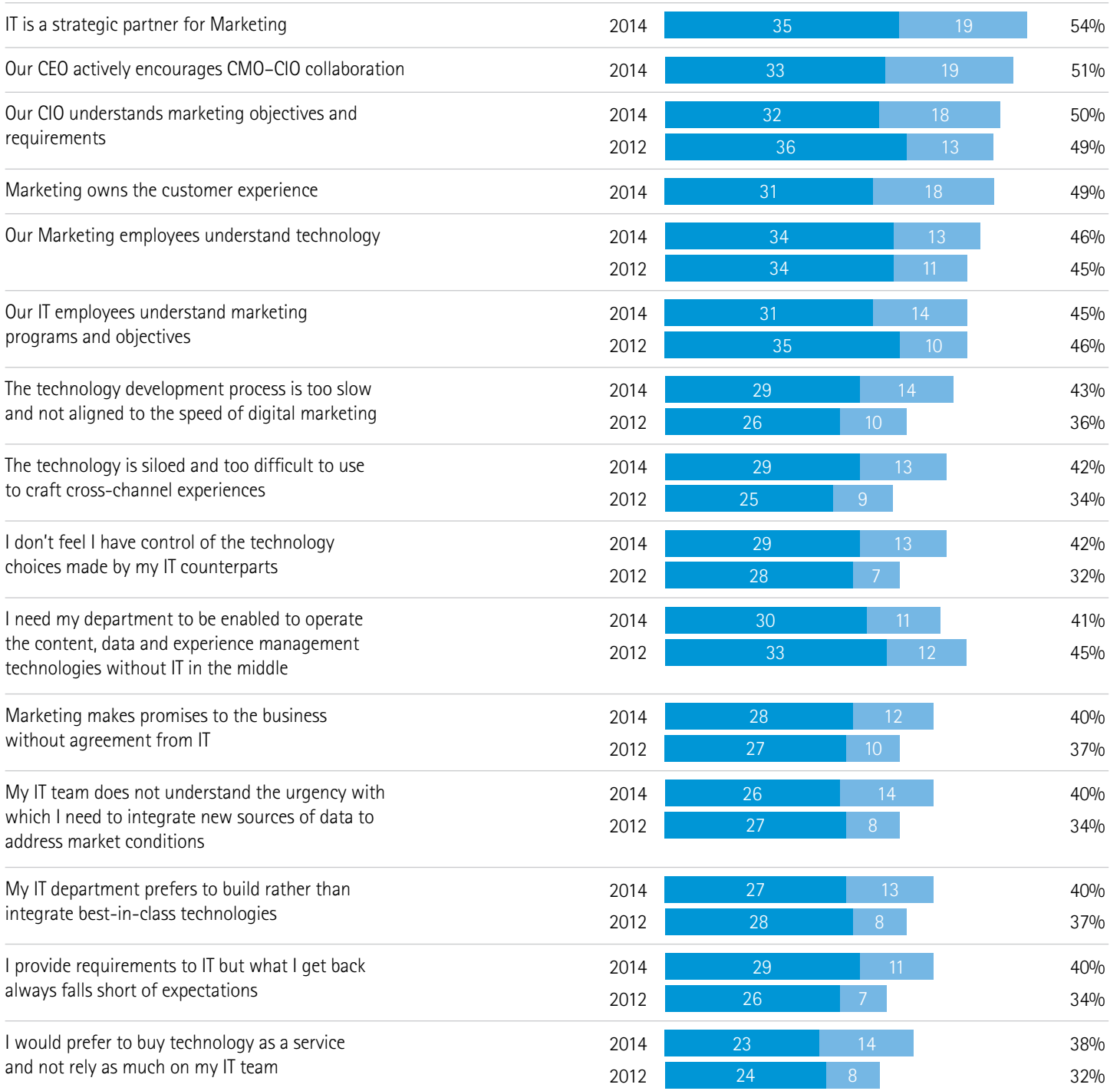
CIO perspective on collaboration

IT is a strategic partner for Marketing	2014	39	29	68%
Software as a service needs to be carefully planned to ensure enterprise standards are adhered to	2014	40	28	67%
	2012	40	25	65%
Our CEO actively encourages CMO-CIO collaboration	2014	33	27	61%
Marketing owns the customer experience	2014	39	16	56%
Our CMO understands our company's technology infrastructure and development process	2014	39	16	54%
	2012	38	17	55%
Our IT employees understand marketing programs and objectives	2014	33	20	53%
	2012	35	15	50%
Our Marketing employees understand technology	2014	35	16	51%
	2012	33	15	48%
Marketing often pulls in technologies without proper consideration for IT standards and architecture	2014	32	17	50%
	2012	35	14	49%
Marketing teams do not understand the complexity of integrating new data sets	2014	32	16	49%
	2012	32	15	47%
Marketing makes promises to the business without agreement from IT	2014	31	17	48%
	2012	31	16	48%
The complexity of handling channel-specific experiences precludes us from providing one platform to manage cross-channel experiences	2014	32	13	45%
	2012	33	9	42%
Marketing requirements and priorities change too often for us to keep up	2014	31	13	43%
	2012	28	12	40%
Marketing teams cannot be trusted to operate technology as they tend not to have the skills	2014	28	14	42%
	2012	32	10	42%
The Marketing department does not provide adequate levels of business requirements	2014	28	13	41%
	2012	33	13	46%

Agree
 Strongly agree

Perspectives on collaboration (%)

CMO perspective on collaboration



■ Agree
 ■ Strongly agree

The multi-channel challenge

While senior marketers and IT leaders alike say it's important to get the multi-channel experience right, both groups are struggling to do so.

This year there is an 8 point increase in marketers agreeing that "technology is siloed and too difficult to use to craft cross-channel experiences" (42 percent). Meanwhile, 45 percent of CIOs say that "the complexity of handling channel-specific experiences precludes us from providing one platform to manage cross-channel experiences."

Nonetheless, CIOs attach more importance to "developing consistent and relevant multi-channel experiences" (43 percent vs. 38 percent for CMOs). Indeed, Accenture research into high-performing CIOs found that their foremost objectives are related to improving the customer experience across channels⁴.

In terms of improving business performance, IT executives have rethought their marketing effectiveness priorities to focus more on multi-channel needs. Rising to the top position this year (up 13 percent) is "improving the links and interactions between Marketing, Sales and channel groups" (48 percent vs. 43 percent for marketers), while social media attracted proportionately more attention from marketers, increasing 15 points to 37 percent (33 percent for CIOs). Interestingly "safeguarding and protecting customer data, brand assets, and trademarks" rose for both technologists (up 7 points to 44 percent) and marketers (up 8 points to 42 percent), a result of the multichannel challenge.

Which industries protect data more?

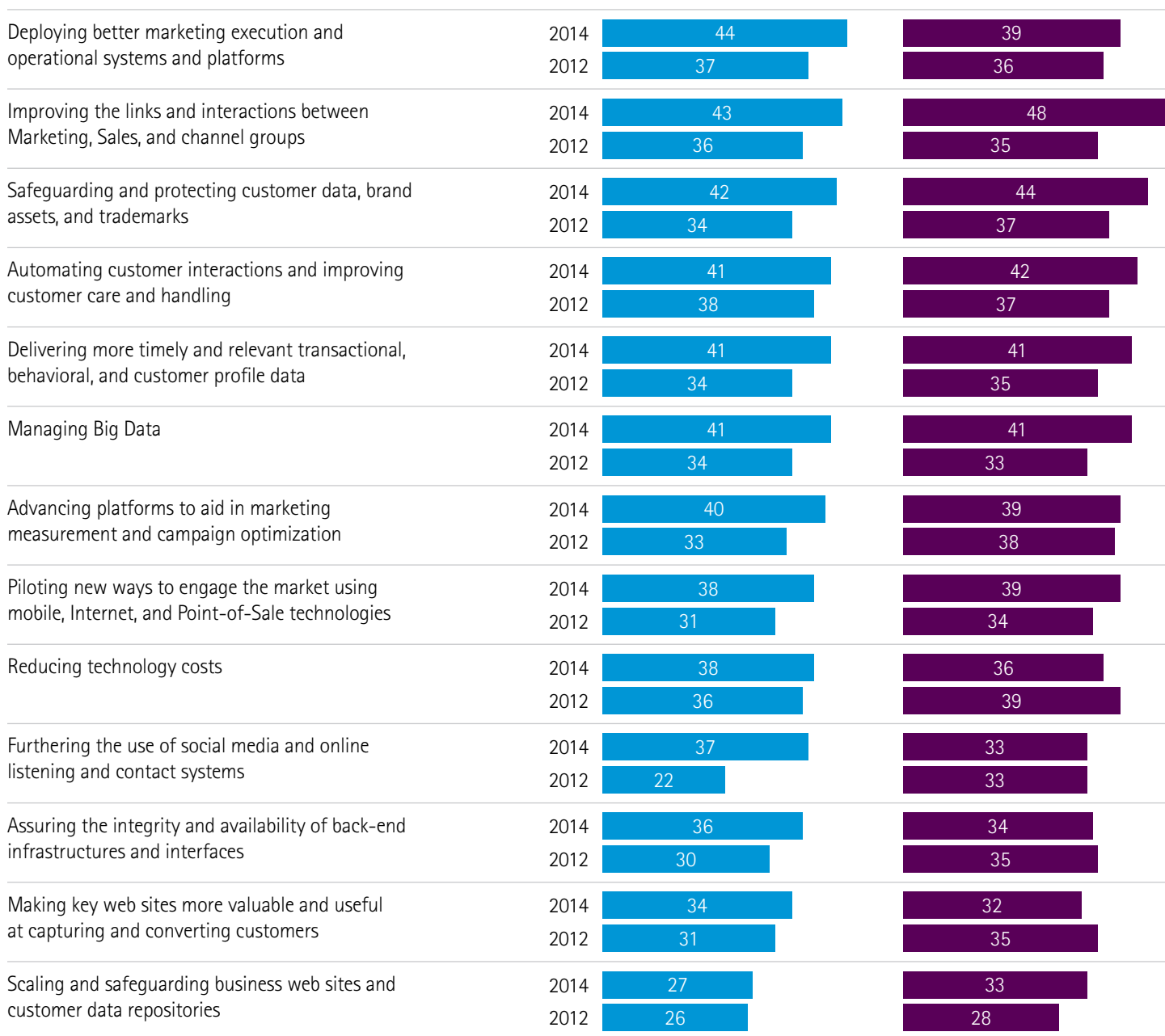
The top 3 protectors of customer data are life insurers, where 36 percent of both CMOs and CIOs say it's one of their top 3 priorities, up 9 points over last year, banking (33 percent, up 3 points) and transportation and travel (also 33 percent, up 5 points).

Notably, retail is at the bottom. Only 16 percent of CMOs and CIOs believe that safeguarding and protecting customer data should be one of their top 3 priorities. This figure is up only 3 points from last year, despite highly publicized security breaches that struck several prominent US retailers during the busy 2013 holiday shopping season.

⁴ Ibid.



Priorities for CIO in improving marketing effectiveness (%)



■ CMO ■ CIO

Obstacles to marketing effectiveness

Perhaps because they're juggling so much, companies say they find it more and more difficult to implement marketing solutions or IT projects that further marketing effectiveness. Some 44 percent of all respondents report they have encountered problems in this area, up from 36 percent a year ago. For CIOs, that figure rises to 45 percent (up 9 points); for CMOs the figure is 42 percent (up 6 points). This finding is an early-warning signal for CMOs and CIOs to improve their implementation capabilities and increase their chances for lasting collaboration. Some leaders seem to be getting the message.

The biggest difficulties cited are "solution complexity and integration," "insufficient budget or funding" and "lack of IT expertise and knowledge." Importantly, problems due to solution complexity are cited considerably less often this year than last year, as is the notion of IT keeping Marketing out of the loop or Marketing Resources taking control and isolating IT. However, problems with simply developing the wrong solution that was not embraced by users has risen considerably.

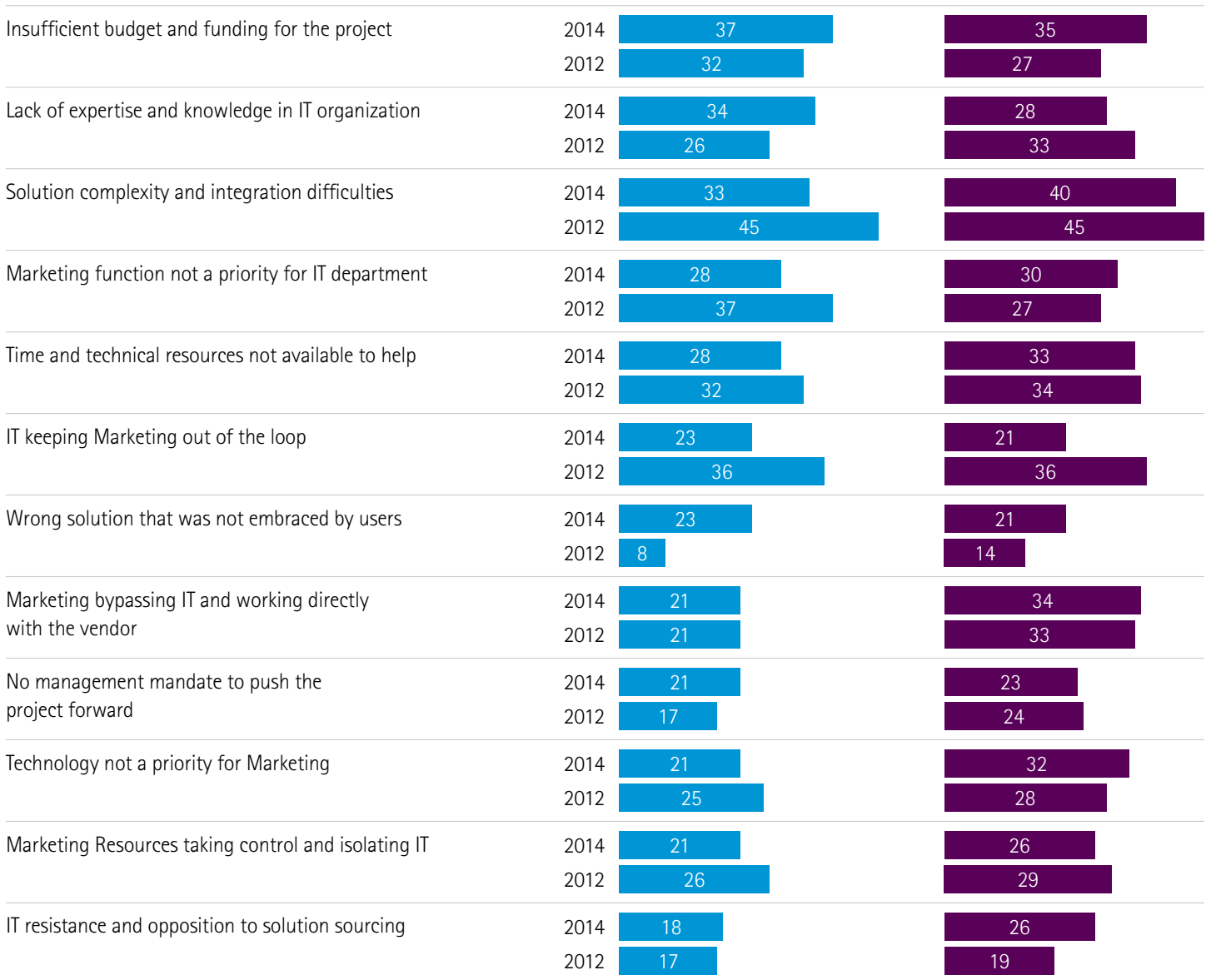
Getting it right for customers

CMOs and CIOs have both had challenges in the past implementing a solution that was not embraced by users, but the issue is only getting worse. Just last year a Fortune 500 company in the United States had to pull the plug on a major software investment that didn't deliver the expected benefits.

Overall, twice as many marketers and IT executives noted this difficulty (22 percent this year vs. 11 percent last year). The situation is even worse among CMOs, where the incidence tripled year over year (23 percent vs. 8 percent). For CIOs it occurs less often but still increased by 7 points over last year (21 percent vs. 14 percent).



Reasons for marketing IT implementation issues (%)



■ CMO
 ■ CIO

CIOs take the initiative

While both the Marketing and IT functions feel more prepared this year to pursue the opportunities presented by digital marketing channels (up 5 points, to 54 percent for CMOs and up 3 to 64 percent for CIOs), there are still a number of challenges, especially for Marketing. "CMOs lack the vision to anticipate new digital channels," say one in four CIOs. Out of 11 options listed for why the two functions feel unprepared, this response shows the biggest movement, up 11 points this year, to 25 percent.

This is yet another early-warning signal for marketing executives trying to navigate the complex and rapidly evolving digital environment. It is critical to not only have a vision, but also to share it with IT to enhance collaboration. If Marketing does not invest the time to make its vision known, the relationship with IT will remain transactional, as CIOs and their teams cannot understand the strategic motivation for what marketers are trying to achieve. If both functions are on the same page strategically, however, digital transformation can become a reality.

Aligned on talent requirements

In considering how best to bridge the gap between their two functions, the top choice for CMOs and CIOs alike is to have people with marketing knowledge work in IT (43 percent). IT executives in particular insisted that this is a critical skill to have for working across the C-suite (50 percent vs. 37 percent among marketers). Of the remaining top 6 skills, the two groups are more consistent in their preferences and priorities:

- Marketing knowledge in IT (43 percent)
- Customer experience skills (42 percent)
- Broad business understanding (42 percent)
- Customer insight skills (40 percent)
- Excellent communications skills (39 percent)
- Being innovative (39 percent)

IT people also tend to highlight mobile technology experience (37 percent vs. 28 percent) and data management skills (39 percent vs. 32 percent) more often.

Emerging markets put more stock in digital, mobile and technological skills, while mature markets value customer experience and customer insights experience somewhat more. Strong-growth firms across the board value all of these skills more than others—suggesting that casting a wide net for a range of skills might be the best way to foster improved working relationships across Marketing and IT.

Without a marketing vision for the digital era, there seems to be no clear mandate for change. The result is a variety of solutions proposed to address the unification of Marketing and IT. Interesting that IT executives opt for "Make IT a service center" significantly more than CMOs (36 percent vs. 27 percent), suggesting a proactive approach. Marketers, on the other hand, look to "Establish a CEO mandate/governance structure" more often (33 percent vs. 27 percent of CIOs), focusing on role definition and responsibilities.



1 in 4 CIOs say CMOs lack vision to anticipate new digital channels



Reasons for not being prepared (%)

Lack of skilled resources	2014	33	23
Insufficient funding for digital marketing channels	2014	31	25
	2012	42	31
Insufficient support from internal IT	2014	25	18
	2012	28	26
Keeping pace with changing consumer behavior	2014	23	27
Solution complexity and integration difficulties	2014	23	32
	2012	37	42
Marketing lacks the vision for anticipating new channels	2014	20	25
	2012	11	14
IT resistance and opposition to solution sourcing	2014	20	24
	2012	13	13
Lack of support from senior management	2014	20	21
	2012	37	37
Complexity of change management for physical channels	2014	16	25
Marketing changes their mind about what is needed or wanted	2014	12	22
	2012	21	30
Insufficient support from external marketing agencies	2014	9	19
	2012	15	21

■ CMO
 ■ CIO

Budget rigor in IT

Little has changed in terms of who controls the marketing IT purse strings. Responses this year are nearly identical to those of last year, with 32 percent saying IT controls three-quarters or more of the budget, 22 percent saying Marketing controls three-quarters or more and the rest (46 percent) saying it's pretty much an even split between the two.

What has changed is the big jump this year in the number of companies using business cases to justify their marketing IT investments. Whether in IT (33 percent this year, 18 percent last year) or Marketing (30 percent this year, 21 percent last year), a great deal more time is being spent to justify marketing-related IT projects—even to the point where analytics are being used for internal evaluations.

CIOs are taking the lead in deploying this approach. They feel strongly that business cases and consultations with IT back-office groups are the top 2 ways to make smart decisions on where, when and how to spend the marketing IT budget. While formal processes can ultimately help solidify the relationship between CMOs and CIOs, they also can affect agility and slow down solution development. Legacy review and approval processes need to be adapted to work in a new agile environment. For both IT and marketing leaders, speed to market is still important following a “test, learn and earn” approach.

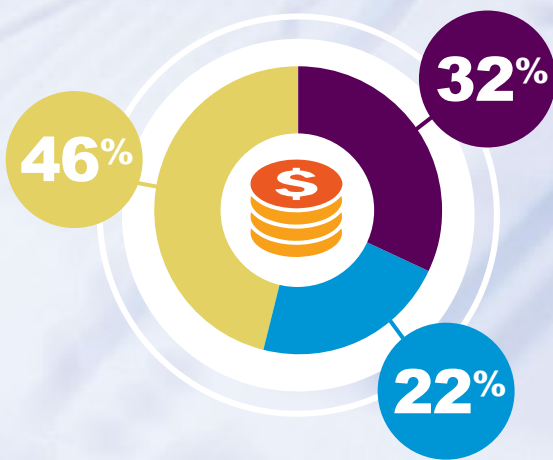
By the numbers for CMO budgets

The good news is that CMO marketing budgets are healthy and growing. Some 51 percent range up to \$250 million, while an additional 34 percent go up to \$750 million. Another 15 percent have budgets over \$750 million.

Some 67 percent of CMO budgets are expected to increase in the next fiscal year, with only 25 percent staying the same. Of those budget increases, 27 percent of CMOs project a 1 percent to 5 percent increase and 26 percent expect an increase of 6 percent to 10 percent. The remaining 14 percent expect to see increases of at least 11 percent.

CMOs are also spending significant amounts on digital marketing. Some 25 percent spend between \$26 million and \$100 million, while another 27 percent spend up to \$500 million. A further 12 percent spend anywhere from \$500 million to more than \$1 billion on digital marketing.

Seven in 10 marketers expect digital marketing budgets to increase in the next fiscal year. Some 24 percent expect the budgets to stay the same, and only 6 percent expect them to decrease.



Who controls the marketing IT budget? 32% say CIO, 22% say CMO and 46% say 50:50



Jump in IT respondents using business case analysis to justify marketing IT investments to 33%

Making the most of digital opportunities

With their can-do attitudes, bigger budgets and strategic focus, CIOs seem to be in touch with what needs to be done to unify the IT and Marketing functions and adroitly ride the digital wave.

We suggest four imperatives for CMOs to square up with CIOs. By working together, CMOs and CIOs will be better positioned to take advantage of the wave of opportunities presented by digital transformation.

Invest time in establishing a vision and collaborate with IT to bring it to life.

The majority of senior marketers continue to think of the traditional role of marketing. As we pointed out in recent Accenture research on CMO priorities, most marketers have yet to set their sights on the broader digital ecosystem⁵. For them, digital is still a channel, not an enabler of business transformation. With digital disruption, business models are being turned on their head and whole industries are being disintermediated. A limited vision is limiting CMO influence in the C-suite and perhaps causing the increasing gaps in collaboration across all C-suite functions. Instead, CMOs and CIOs have the opportunity to come together and steward new products and services that arise as a result of a digital business model and mindset. For example, the CIO of one US retail company is not only involved in the development of the marketing strategy, he is also part of the committee reviewing and selecting external partners to help execute, measure and analyze against the marketing plans.

Unify around the customer experience to create a truly digital business.

With a shared marketing IT vision, companies will be able to focus on achieving a seamless customer experience. To become more customer centric, organizations must provide consistent and relevant multi-channel experiences. But multi-channel delivery is only the beginning. While it allows customers to complete transactions in each channel, the potential for silos remains high because the channels are not always integrated. Omni-channel, in contrast, represents the new-world order. It views the experience from the outside-in, orchestrating the customer experience across all channels seamlessly. To be fully customer centric, however, the enterprise needs to go beyond omni-channel—to something we call omni-experience. Omni-experience inverts the traditional organizational pyramid and puts the customer at the top, requiring all functions to focus on the customer first and eliminating silos in the process. Consider the growing number of retailers starting to leverage in-store GPS technologies to serve up timely and “hands free” promotions and payment options to customers’ smartphones—cutting across traditional offline–online boundaries to delight the customer.

⁵ Accenture Interactive, CMOs: Time for Digital Transformation, June 2014; www.accenture.com/cmoinights

Rethink the operating model to integrate customer-focused skills throughout the company.

Regardless of business function, people need more skills in how to analyze data and gather insights because digital is uncommonly good at collecting and connecting data. Companies also need customer experience skills, whether the customer is an individual consumer, an internal customer or a business customer.

The customer experience starts at any point along the continuum from awareness to purchase to recommendation—now a continuous loop of experiences. That means any employee in any function—not just within Marketing and IT—has the opportunity to help make the business a digital business. Early examples of leading operating models include the sharing of new customer acquisition incentives and KPIs across traditional departmental boundaries and interdisciplinary teams from Marketing, Sales, Customer Service and IT being evaluated together on the whole customer experience.

Orient the marketing model and budget to align with a new ecosystem of marketing services.

Taking traditional IT and channel-oriented approaches to digital marketing and digital experience management just reinforces silos. Customers only see the experience and how it works for them—or doesn't. Digital requires end-to-end journey management. It is no longer about the Marketing or IT functions in isolation. It's about integrating technology, data and marketing services, running the platform in the cloud, responding quickly to new customer requirements and adding new services as required. "Test, learn and earn" is the new mantra, and Marketing needs to have more flexibility in managing the marketing IT budget. Just as wearable technologies introduce a whole new array of services for, say, sports apparel companies, requiring new content—think music, health tips, training coach—new partners and new revenue streams, CMOs will want to collaborate with IT and direct funds to take advantage of the continually evolving digital ecosystem, engaging customers whenever, wherever.



Charting a course to high performance

The debate is no longer about whether CMOs and CIOs should align. The digital wave cuts across the functional divide and will wash away the senior marketers and IT executives who stay in their existing sand castle, no matter how intricate its design or effective its moat.

Rather, it is about how. How can CMOs and CIOs take to the sea with the enthusiasm of a surfer, fully committed to ride each wave that comes along. Those who can share techniques and strategies, adapt tools and refine skills to provide a delightful experience for all involved—especially customers—will help shape the digital business of the future and chart the course to high performance.



About the research

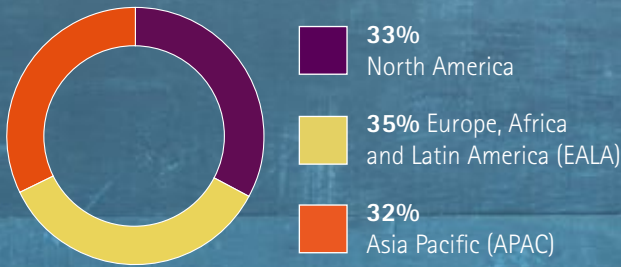
The 2013/14 CMO-CIO Alignment survey is the fourth in a series of studies sponsored by Accenture and aimed at understanding the opinions, challenges and points of view of senior marketing and IT executives on the impact of digital strategies and capabilities on their business.

The survey was in the field from November 2013 to January 2014.

Results are based on the responses of key marketing and IT decision makers around the world:



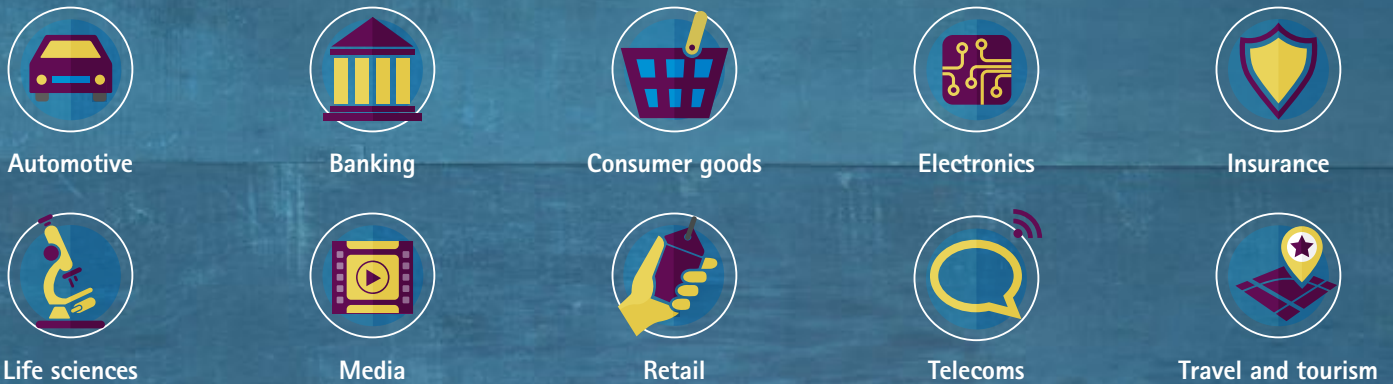
Global respondent distribution:



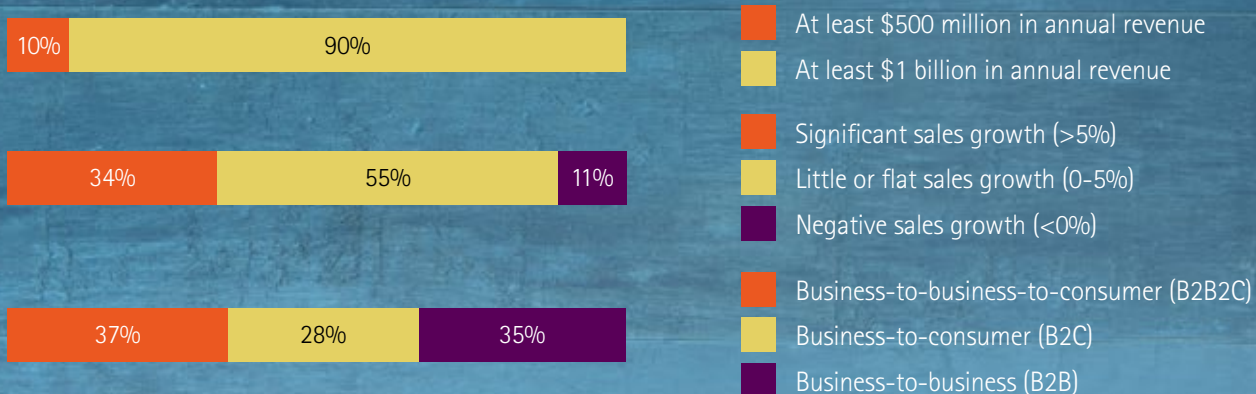
Countries included:



Industries surveyed:



Respondent demographics:



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Interact with Key Findings



Explore the study findings further through the data visualization dashboards, powered by Tableau. For desktop and tablet users only.



About Accenture Interactive

Accenture Interactive helps the world's leading brands delight their customers and drive superior marketing performance across the full multi-channel customer experience. As part of Accenture Digital, Accenture Interactive works with over 23,000 Accenture professionals dedicated to serving marketing and digital clients, to offer integrated, industrialized and industry-driven digital transformation and marketing services. Follow @AccentureSocial or visit accenture.com/interactive.

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Accenture is a global management consulting, technology services and outsourcing company, with more than 293,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US\$28.6 billion for the fiscal year ended Aug. 31, 2013. Its home page is www.accenture.com.

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