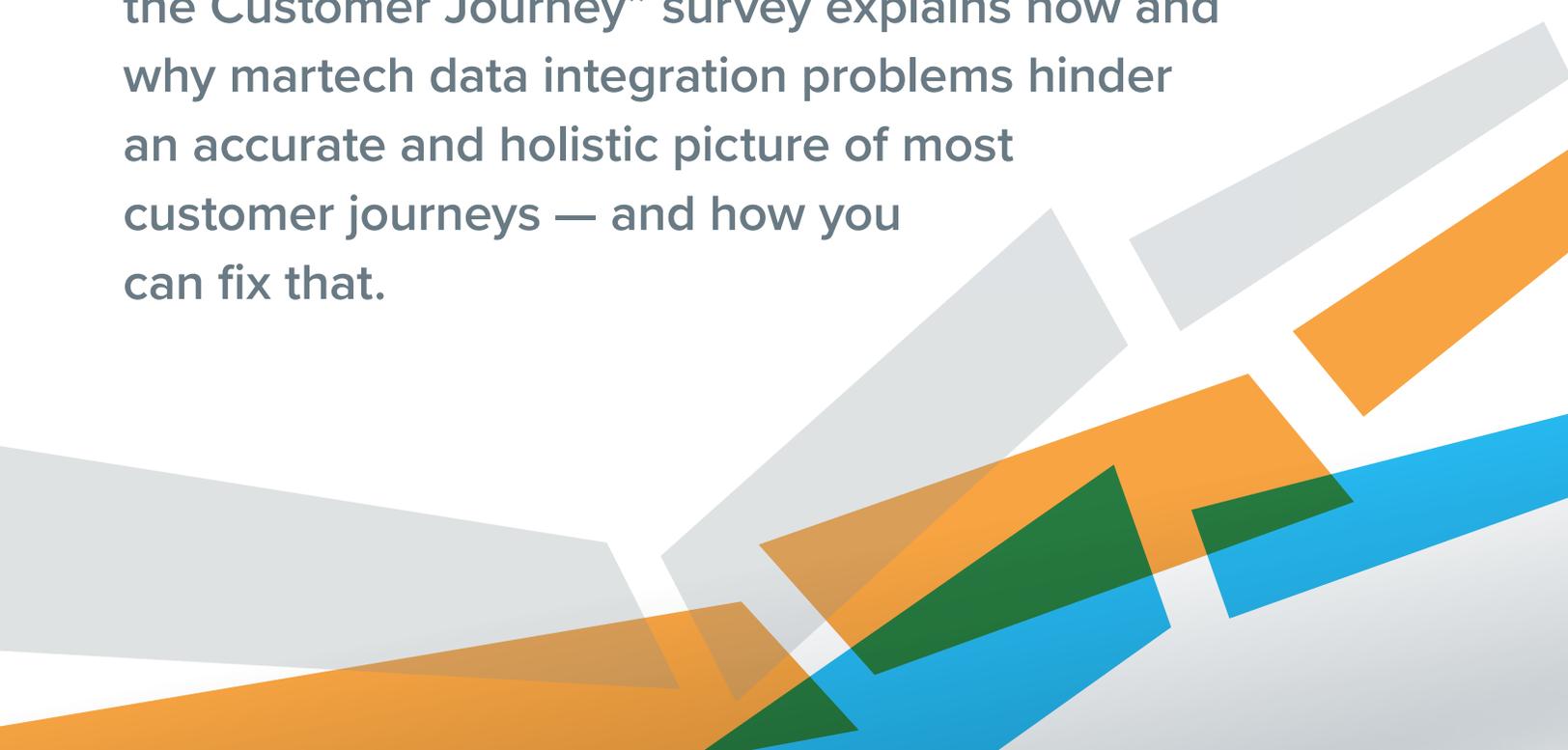


The logo for ARM Treasure Data Survey. The word 'arm' is in a bold, lowercase, blue sans-serif font. Below it, 'TREASURE DATA' is in a smaller, uppercase, grey sans-serif font. Below that, 'SURVEY' is in a larger, uppercase, grey sans-serif font.

**arm**  
TREASURE DATA  
SURVEY

# Why is it Still Hard to Get the Customer Journey Right? The State of the Customer Journey in 2019

Struggling to create profitable customer journeys for every customer? You're not alone. "The State of the Customer Journey" survey explains how and why martech data integration problems hinder an accurate and holistic picture of most customer journeys — and how you can fix that.

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## EXECUTIVE SUMMARY: MANY COMPANIES STILL STRUGGLE TO LEVERAGE THEIR DATA

In highly competitive markets, winning (or losing) a customer often comes down to who can provide a truly excellent omnichannel customer experience. That means your customers move seamlessly from awareness through evaluation to finally making their purchase decisions.

Providing an excellent customer experience is a goal that many marketers pursue, but companies still struggle with integrating and analyzing data from the disparate technology platforms and apps that support the omnichannel digital experience. This siloed data, combined with gaps in data analysis skills and lack of resources in marketing, technology, and data science, makes it tough for many organizations to develop accurate pictures of their customer journeys.

### Is More Data Improving the Customer Journey?

This research report, “The State of the Customer Journey,” provides a detailed look into the state of the buyer's journey. We wanted to know if, as marketing technology platforms multiply, marketers really have a better understanding of how to best attract and serve their customers. Or, are marketers drowning in a sea of underused data?

The answer is somewhat complicated. But a picture emerges of many companies still failing to effectively utilize the increasingly large amounts of data they collect to improve customer journeys. Specifically, key report findings show:

- ▶ **Silos hurt.** More than half of those surveyed (**54%**) say their biggest barrier to leveraging data is fragmented or siloed data, which makes it difficult to get an accurate, integrated view of the customer journey (Fig. 2)
- ▶ **Customer journeys are complicated.** Most (**61%**) report having three or more pre-purchase customer touchpoints, with about a third of all respondents (**32%**) reporting six or more touchpoints.
- ▶ **Many don't know what works.** Nearly half (**48%**) say they are not using a formal attribution strategy, making it difficult to determine which of their efforts produced a sale.
- ▶ **Customer journeys take time, need tracking.** Long buying cycles make it critical to keep track of customer journeys. About **40%** report the timeline from first engagement to purchase is four months or longer.
- ▶ **Unreliable data sources lead marketers to a false sense of effectiveness.** Respondents cite salespeople and the company website, rather than more objective data sources, as two of their three most influential marketing channels. Interestingly, those aren't the primary channels they turn to when making their own purchase decisions.

Read on for the detailed findings from the survey. ●

# Report Details: The State of the Customer Journey

Marketing technology platforms continue to proliferate. The 2019 [Marketing Technology Landscape Supergraphic](#) identified 7,040 marketing technology vendors, up from 5,000 vendors in 2017. These companies provide tools for independently managing everything from mobile advertising to interactive content to influencer marketing activities (plus dozens of more sales and marketing functions). •

# Data-analysis Skills Gap Compounds Challenges for Marketers

With the proliferation of martech tools and data, it's no surprise that nearly half (47%) of respondents say siloed and fragmented data sources are the biggest barrier to gaining insights. Silos make getting an accurate, integrated view of the customer journey difficult.

But it's not smooth sailing for the companies who have robust data sets either, with 20% of respondents citing they don't have the internal know-how or capacity to extract insights from their data. While more data scientist jobs have been created in the past 10 years, the role hasn't become widely held. And just because a company has a data scientist on the team doesn't mean that person is available for regular analysis of marketing data.

## What is your biggest challenge when it comes to gaining insights from your marketing data?

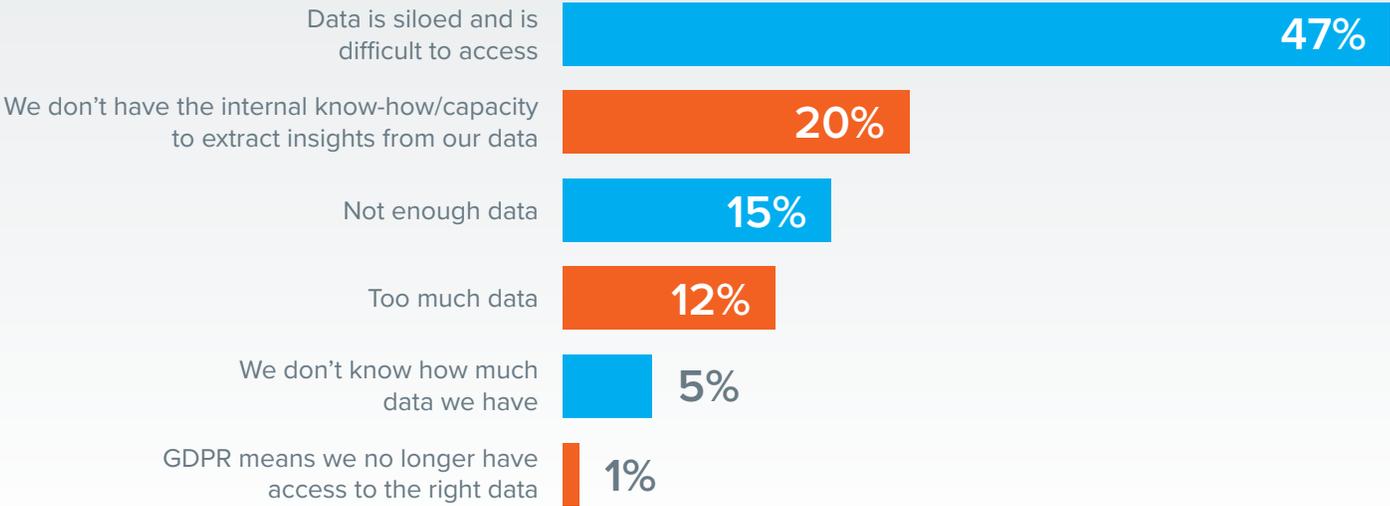


Fig. 1

### The Data-analysis Skills Gap Continues

The data-analysis skills gap has also grown in many sales and marketing organizations. Martech platforms have multiplied, and some organizations are barely able to scratch the surface of their customer journey data, let alone build a complete picture of the typical customer journey by persona. Fragmented data and a lack of in-house data-analysis skills are a significant barrier to data-driven marketing.

## Empowering People Helps

Marketers face increased pressure to prove the ROI of each budget line item. Yet a team who struggles to analyze their data might be part of the 17% of respondents who aren't given the authority to act on the trends or insights they glean from their data. •

### Of the data you do have, what do you feel is the biggest barrier to leveraging it?

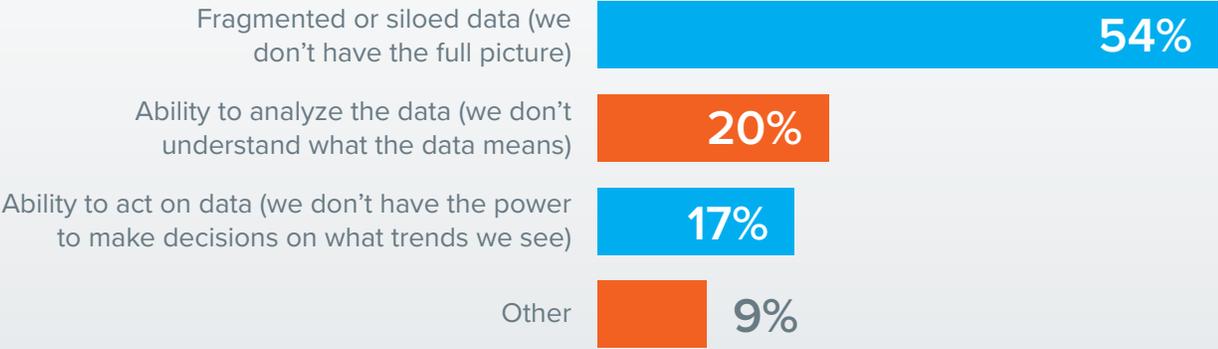


Fig. 2

# How Long Is the Modern Buyer's Journey?

Respondents revealed that lengthy, multichannel customer journeys are the norm. Seventy-one percent say the time between first customer engagement and purchase is a month or longer. And 61% say customers typically engage with their brand three or more times before making a purchase. For 15%, the number of touchpoints prior to purchase is 11 or more.

## How long is your typical customer journey — from first customer engagement to purchase?

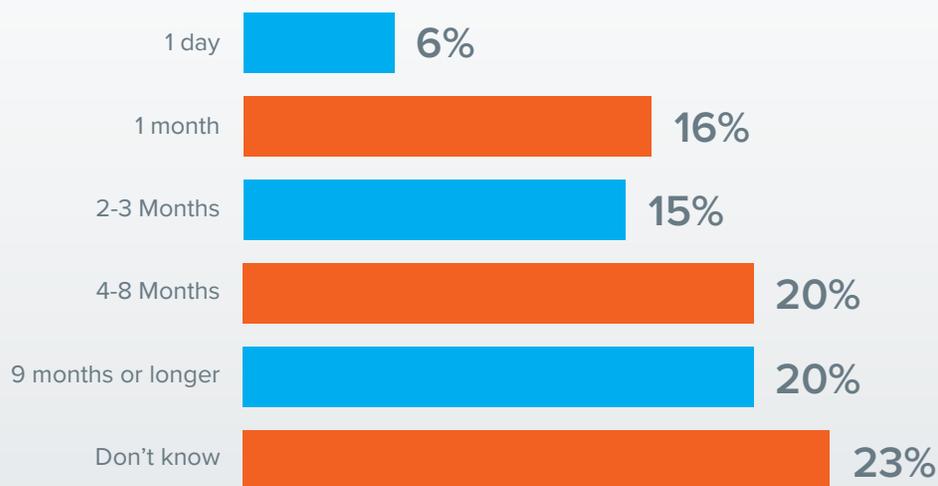
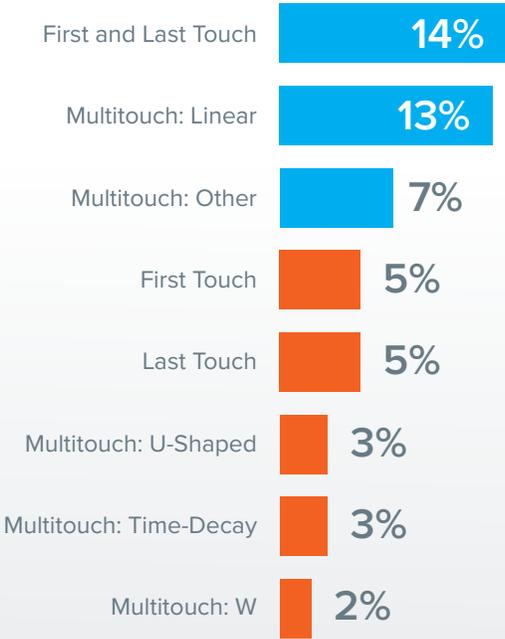


Fig. 3

Despite this complexity, fewer than a third (28%) of respondents use a multi-touch attribution strategy to create an accurate customer journey map and identify all the right brand touchpoints. In fact, nearly half (48%) say they don't use any formal marketing attribution strategy. This means, at best, those surveyed are making product, sales, and marketing decisions with partial data from only a subset of their customers' activities. While having a slice of data is better than guessing, it's not what data-driven businesses are striving to achieve. ●

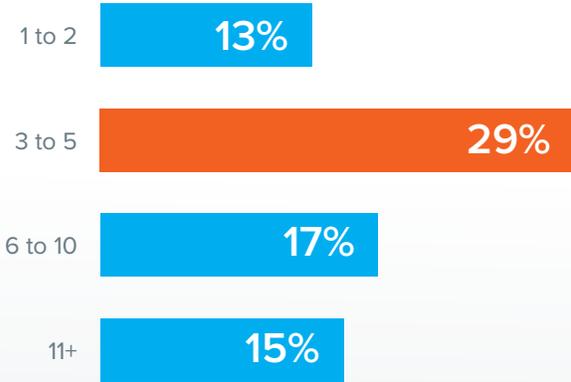
### What type of marketing attribution strategy are you using?



Note: 48% of respondents surveyed reported not using a formal marketing attribution strategy

Fig. 4

### How many touchpoints with your brand does the typical customer have before making a purchase?



Note: 26% of respondents surveyed reported not knowing.

Fig. 5

# Companies May Overemphasize Easy-to-Measure Channels

With so many potential paths for each customer journey, which channels really influence the decision to buy? Among 11 different marketing channels, close to 90% of respondents consider three to be somewhat or very important to their customers' decisions to purchase. Word-of-mouth and company website are the most important channels with 87% choosing them. These are closely followed by salespeople with 86% of respondents. It's not surprising that word-of-mouth is considered one of the most important channels. Over the past decade, recommendations from colleagues or friends have increasingly become a decision-making factor in purchases ranging from B2B service providers to sneakers.

However, when the same respondents rank their level of trust in each channel for their own buying decisions, a different picture emerges. Both salespeople and company websites take a hit. Just over half (51%) of respondents say they trust company websites and not even a quarter (23%) say they trust salespeople.

Word-of-mouth is the most trusted channel with 80% of respondents saying they trust it. Analyst reports and third-party reviews are the second and third most trusted channels, with 69% and 68% respectively.

It is worth noting that respondents cite objective, external data sources as most trusted in their own decision-making, while including two company-centric sources (websites and salespeople) as most important to their customers.

Without solid attribution tracking and data integration, it is possible that channels companies can most easily measure — such as, salespeople via a CRM and website traffic and conversions with web analytics — are being given more credit in the buying journey than they deserve. As a result, marketing budget might be spent on channels that aren't helping move buyers through their decision-making process.

"When you are making marketing decisions based on first or last touch, it's like you are baking a cake but only looking at — and using — the final item on the ingredients list," says marketing consultant Erika Heald. "Just as that perfect cake requires the right mix of ingredients handled in a precise way, so too do marketers need to evaluate the full picture from a customer journey standpoint if they are going to optimize their marketing mix." ●

## How important are the following channels in influencing a buyer's decision to purchase your product?

	Very Important	Somewhat Important	Neutral	Somewhat Unimportant	Not At All Important
Media	15%	40%	28%	5%	12%
Social Media	19%	34%	35%	6%	5%
Word of Mouth	56%	31%	9%	1%	3%
Television Advertising	8%	15%	17%	12%	49%
Radio Advertising	5%	15%	19%	12%	49%
Catalogs, Flyers or direct mail	6%	35%	23%	9%	27%
Trade Shows/ Events	23%	43%	16%	13%	5%
Salespeople	59%	28%	8%	4%	2%
Company Website	49%	38%	10%	1%	2%
Third Party Reviews	28%	40%	18%	8%	6%
Analyst Reports	30%	27%	16%	12%	16%

Fig. 6

## When Thinking About Your Own Purchasing Behaviour, How Much Do You Trust Each of The Following Channels As Sources For Making Your Buying Decision?

	Trusted	Neutral	Untrusted	Do Not Use
Media	29%	60%	5%	6%
Social Media	21%	61%	13%	5%
Word of Mouth	80%	15%	3%	2%
Television Advertising	9%	54%	14%	23%
Radio Advertising	12%	49%	13%	27%
Catalogs, Flyers or direct mail	16%	53	15%	16%
Trade Shows/ Events	38%	50%	5%	6%
Salespeople	23%	55%	15%	6%
Company Website	51%	42%	4%	3%
Third Party Reviews	68%	25%	5%	2%
Analyst Reports	69%	23%	2%	5%

Fig. 7

# Conclusion: How To Fix Your Customer Journeys

This survey highlights a few key areas of focus for data-driven marketers:

- ▶ **Break down data silos.** Integrate the data you already collect. Helpful marketing technology, such as customer data platforms (CDPs), combine data from many sources, online and off, to create a full picture of the different customer journeys your buyers and prospects take. With more unified data you can find out what compels customers to buy and why. Bonus: When you integrate your martech, it makes it easier to calculate ROI on all your efforts, not just each type of martech.
- ▶ **Focus on attribution.** Adopt a multi-touch attribution strategy. How do your customers enter your pipeline? Which things do most customers do or experience right before they buy? Can you attribute a sale to several items, giving “partial credit” to each one? The right data platform and analytics can help you answer all of these questions.
- ▶ **Hire data-driven people and give them the technology they need to do their jobs right.** In particular, focus on platforms that make it easier to find data insights, such as dashboards and easy-to-use analytics, so they can explore data and communicate their insights to the larger organization.

- ▶ **Democratize data science and analytics.** Eliminate barriers to the intelligent use of data. An increasing range of marketing roles require the ability to act on data insights. By giving more people access and authority to data, you can reduce sales and marketing bottlenecks and improve the effectiveness of your team.
- ▶ **Create a customer journey map.** Identify and document your customers' paths to purchase, including the content most often consumed and the channels used before purchase.
- ▶ **Identify and optimize the channels and touchpoints that matter most.** Where do you see the largest number of customers dropping out of your customer journey? Is there an integration or touchpoint here that isn't working as well as it should be? Identify what you can do to remove friction at those points. Optimize these key points in the buyer journey for maximum impact and conversion. ●

# Customer Journeys Are Changing Fast — And So Are Effective Strategies

It's clear from these survey results that customer journeys have gotten long and complicated, and marketing organizations are struggling to keep up with the myriad of ways individual customers engage and interact on their many paths to purchase. To avoid being left behind, now is the best time to re-examine the data customers generate and how it can be used to make their journeys easier and even fun, increasing the chances they'll repeatedly buy along the way. •

# About the Respondents

The majority of respondents (**65%**) work at companies of 2,000 employees or fewer, while **26%** work at enterprise-level companies of 5,000-plus employees.

About **46%** of respondents work in marketing and sales. Other departments included IT, digital/e-commerce, and C-suite.

The largest concentration of respondents work in computer software (**12%**), closely followed by advertising and marketing (**61%**) and IT services companies (**11%**). •

# Our Methodology

Readers and followers of Simpler Media Group were invited to respond to the 2019 State of the Customer Journey Survey, that was conducted from February 11, 2019 to April 2, 2019. The survey report is based on an analysis of the full and partial results of these 158 respondents to the survey. •

## ABOUT ARM TREASURE DATA



Arm Treasure Data's enterprise Customer Data Platform (CDP) unifies data from multiple sources — online, offline, IoT and device generated data — and empowers enterprises to disrupt their markets with superior customer experiences. Our customers are creating transformational customer relationships by connecting the data dots with our CDP. Arm Treasure Data is fully owned by Arm Holdings and has a global customer base of over 300 enterprises including Fortune 500 and Global 2000 companies. Our clients manage over 130 trillion records, resulting in more predictable and profitable business results.

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