Digital Customer Experience Trends To Watch, 2013
by Ron Rogowski, January 30, 2013

KEY TAKEAWAYS

Expectations For Digital Customer Experiences Are Rising
As customers add new devices to their repertoire of digital touchpoints, their expectations for experiences that adapt to their context is on the rise.

Firms Take Strides Toward Unified Experiences
2012 saw the emergence of responsive site design. In 2013, sites will do more than match displays to form factors -- they’ll also reprioritize which content gets delivered depending on context.

Mobility Plays A Key Role In Shaping The Experience Ecosystem
In 2012, mobile devices played a big role in unifying cloud-based services. In 2013 -- and beyond -- mobile will become the hub for controlling connected products and will become the remote control through which people manage their everyday lives.
Digital Customer Experience Trends To Watch, 2013

Landscape: The Digital Customer Experience Improvement Playbook

by Ron Rogowski

with John Dalton and Allison Stone

WHY READ THIS REPORT

Digital touchpoints support an increasingly large percentage of the overall customer experience. 2012 saw the emergence of several important digital customer experience trends that will gain momentum as firms look to unify the cross-touchpoint experiences they deliver in 2013. This report outlines key trends that will make up the landscape that customer experience professionals will be working in as they take strides to improve their digital customer experiences in 2013.

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Forrester interviewed eight vendor and user companies, including: Acuity Group, Cynergy Systems, EffectiveUI, NavigationArts, PoetPainter, Roundarch Isobar, SapientNitro, and the Teachers Insurance and Annuity Association-College Retirement Equities Fund (TIAA-CREF).

Related Research Documents

Contextualization
November 19, 2012

The Unified Customer Experience Imperative
April 30, 2012

Three Digital Experience Trends To Watch In 2012
January 9, 2012
2012 TRENDS POINT TO MORE UNIFIED EXPERIENCES IN 2013

What types of digital experiences will shape the customer experience landscape in 2013? To find out, Forrester analyzed digital customer experience trends that gathered momentum in 2012 and uncovered innovations that will have wide-ranging implications for the next year. According to our analysis, 2013 will be a year in which companies focus on unifying experiences for their customers. As they take steps to do so, we’ll see:

- **Website designs go from responsive to adaptive.** The rapid adoption of smartphones and tablet computers has forced companies to rethink how they deliver content to their customers (see Figure 1). But early adopters are not abandoning old devices — they’re just using more of what’s available (see Figure 2). In 2012, responsive design emerged as a way to meet this multitouchpoint engagement challenge. Leading the way were media sites like that of *The Boston Globe*, which offered the same content with different display characteristics for different form factors (see Figure 3). In 2013, look for a shift from today’s narrow focus on consistent cross-channel content delivery to site experiences that adapt to suit the most common use cases for the device. For example, New Zealand’s Kiwibank serves up a mobile-friendly login, branch finder, and customer service number when its customers reach out to the bank via a smartphone browser (see Figure 4).

- **Digital experiences become more contextual.** The customer experiences with the most impact meet customer needs, feel personally relevant, and deliver in the moment.1 2012 saw vendors from content management to commerce, analytics, and recommendations engines bring contextualization solutions to market. What customers got were sites that used clickstream data to deliver targeted content (see Figure 5). They also got apps that used location information to deliver valuable services (see Figure 6). In 2013, look for companies to marry specific information about individual customers — such as purchase and service history — with situational data like time of day and location to deliver highly contextual experiences. How will companies pull it off? By leveraging aggregate data about customer behaviors that can help them predict what users will need next.

- **Devices sync with each other and with products.** The past several years have seen the emergence of innovative services like Amazon.com’s Kindle, Evernote, and Nike Plus that leverage the cloud to sync information across devices — a trend likely to continue into and beyond 2013. Also in 2012, companies like Best Buy started selling home automation technologies, and Comcast launched Xfinity Home, a service that lets customers manage their home’s security and other connected services through mobile and tablet apps. Devices have made connections in other ways as well. For example, AKQA built a social game for Heineken, a Champions League sponsor, which lets fans engage with one another during matches. The downloadable app pinpoints exactly where users are and delivers commentary in sync with local broadcast times, which may be delayed (see Figure 7). Expect these kinds of cross-device connections to proliferate in 2013 as firms look for new ways to engage their always-connected customers.2
- **Interfaces become cleaner and touch-friendly.** Tablets and smartphones have brought touch computing into the mainstream. And smart companies have responded with design solutions that work for both touchscreens and keyboards (see Figure 8). This trend will continue in 2013, as a sea of touchscreen-inspired interfaces replaces crowded text links and tiny buttons with more spacious layouts that are easier to access (see Figure 9). In addition, niche services like Simple and Litographs will continue to set the experience bar with uncluttered sites sporting large targets that are well suited to both mouse and touch experiences from the outset (see Figure 10).

- **Information visualization (“infovis”) goes mainstream.** Beginning with sites like Mint and Hipmunk and continuing to apps like Flipboard, information visualization has been making a splash. The trend hasn’t just influenced customer-facing apps. Digital agency 360i uses a graphic design layer to help drive insights from a wealth of social listening and sentiment data for its clients. Roundarch Isobar built an app that helps New York Jets’ ownership understand — and react to — real-time information about the game-day fan experience with a front-end application that’s as simple and engaging as it is informative. As companies make more data available to customers and employees via tools that track behaviors like spending trends in financial services, care tracking in health and wellness, and mobile phone usage, they’ll turn to interfaces that help users quickly drill into details that are not only presented but also explained by the interface.

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**Figure 1** Forecast: US Smartphone And Tablet Adoption, 2011 To 2016

*Forecast: US device adoption, 2011 to 2016 (millions)*

<table>
<thead>
<tr>
<th>Year</th>
<th>Total population with a tablet device</th>
<th>Unique smartphone users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>100</td>
<td>50</td>
</tr>
<tr>
<td>2011 (F)</td>
<td>150</td>
<td>70</td>
</tr>
<tr>
<td>2012 (F)</td>
<td>200</td>
<td>90</td>
</tr>
<tr>
<td>2013 (F)</td>
<td>250</td>
<td>110</td>
</tr>
<tr>
<td>2014 (F)</td>
<td>300</td>
<td>130</td>
</tr>
<tr>
<td>2015 (F)</td>
<td>350</td>
<td>150</td>
</tr>
<tr>
<td>2016 (F)</td>
<td>400</td>
<td>170</td>
</tr>
</tbody>
</table>

Source: Forrester Research Consumer PC And Tablet Forecast, 2011 To 2016 (US); Forrester Research Mobile Adoption And Sales Forecast, 2012 To 2017 (US)
**Figure 2** Tablet Users Show Increased Activity Across Devices

"What devices do you use to do each of the following?"

<table>
<thead>
<tr>
<th></th>
<th>Tablet owners</th>
<th>US total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purchase products online</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop/netbook computer</td>
<td>65%</td>
<td>59%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td>Cell phone/smartphone</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Bank online</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop/netbook computer</td>
<td>64%</td>
<td>58%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>58%</td>
<td>60%</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>Cell phone/smartphone</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Book travel online</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop/netbook computer</td>
<td>69%</td>
<td>66%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Cell phone/smartphone</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Access social networking sites</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop/netbook computer</td>
<td>70%</td>
<td>64%</td>
</tr>
<tr>
<td>Desktop computer</td>
<td>54%</td>
<td>56%</td>
</tr>
<tr>
<td>Tablet computer</td>
<td>52%</td>
<td>13%</td>
</tr>
<tr>
<td>Cell phone/smartphone</td>
<td>53%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Base: US online adults (ages 18+) who have done the following activities in the past month (multiple responses accepted)

Sources: North American Technographics® Online Benchmark Survey (Part 2), Q3 2012 (US, Canada)
**Figure 3** Responsive Design Right-Sizes *The Boston Globe’s* Display

Source: *The Boston Globe* website

Source: Forrester Research, Inc.
**Figure 4** Kiwibank’s Adaptive Experience Prioritizes Device-Specific Tasks

On a PC, the site focuses on products and “Internet banking.” On a mobile handset, it prioritizes mobile-relevant tasks and content.

Source: Kiwibank website

Source: Forrester Research, Inc.
Instead of delivering page-based recommendations, hoppit changes its recommendation set to more upscale options after users click on its ambiance newsletter.
**Figure 6** Zipcar Uses Location To Pinpoint Local Cars And Unlock A Reserved Vehicle

Source: Zipcar mobile app

Source: Forrester Research, Inc.
Figure 7 Heineken Engages The Multiscreen Customer In Real-Time Competition

Source: AKQA website

Source: Forrester Research, Inc.
Figure 8 Companies Like Nationwide Insurance Have Begun Simplifying Their Interfaces

Source: web.archive.org website; Nationwide Mutual Insurance website

Source: Forrester Research, Inc.
Figure 9 Ally’s Design Easily Accommodates Both Mouse Clicks And Touch

Source: Ally Financial website

Source: Forrester Research, Inc.
Recommendations

FIND THE STARTING POINT FOR UNIFYING THE DIGITAL EXPERIENCE

Customer experience professionals will have a lot of initiatives to tackle in 2013, but they won’t accomplish their goals of delivering seamless unified experiences across all of their touchpoints at once. To get the most out of their efforts in 2013, customer experience professionals should:

- **Pinpoint key moments of truth and work outward.** Focus will be critical in 2013. Customer experience professionals will need to pinpoint key customer journeys that support their most critical business needs. For a wireless company, this could be the 18- to 24-month mark of a two-year contract when customers consider renewal, while for an investment services company, this might be the critical 30 days after opening an account that determine whether customers will actively fund the account. Having identified such pivotal moments,
firms should use journey maps to uncover the key moments of truth that make or break those journeys and work outward from there to smooth out the rough spots crippling today’s experiences.

- **Move beyond device-specific strategies.** Companies complain about silos being a limiting factor in delivering great customer experiences. For customers, a major frustration is the inability of companies to leverage data to maintain continuity and context from one touchpoint to the next. A device-centric strategy exacerbates both of these problems and limits the value of individual interactions. For example, knowing a user’s location is helpful, but that interaction might be more powerful if combined with a complete view of the customer’s interaction history. That’s why firms need to think holistically about the experiences they deliver and take steps to govern strategic execution. How? With cross-functional teams that can work horizontally to help educate and coordinate activities that will deliver more unified experiences.

- **Leverage inherent device strengths for smart handoffs.** After finding the starting point, look for ways to enhance the experience, and fill in the white space between more formal, infrequent face-to-face and more routine transaction-based touches. To do this, companies will need to take a service design approach. But they’ll also need to understand and leverage device capabilities that can add just the right bit of context to an interaction. For example, mobile credit card readers can turn a mobile phone or tablet into a roaming point-of-sale interface. Location-aware mobile devices can enable apps to direct customers to locally available in-store services. These kinds of capabilities, if tied to other touchpoints, help blend the physical and digital aspects of the overall customer experience.

**WHAT IT MEANS**

**CONTEXT WILL BE KING IN 2013 AND BEYOND**

With so many big trends converging in 2013, expect big changes in organizations and interaction models.

- **Data scientists and graphic designers will be in high demand.** The shift toward context is driven by data — big data. But the true value of data is in the insights it can deliver. To get these insights, companies will look to hire data professionals and team them up with visual designers. The combination of skills will help companies deliver easy-to-understand customer insights internally and compelling interfaces to their customers.

- **Mobile becomes the experience unifier . . .** Unprecedented access to information at the point of decision-making will keep users engaged in mobile. And as device capabilities increase, customer benefits will increase. As companies focus on the multitouchpoint
journey, mobile will help tie together what used to be singular high-impact in-store or phone interactions with mobile services that bridge gaps in the customer journey.

- . . . and coordinator. As more objects become connected, people will turn to mobile as a way to manage them. Look for digital services that combine information from connected products with practical services to emerge. It will be less about your refrigerator telling you need more milk and more about the heart stent in your chest letting you know that it may need to be replaced. Along the way, mobile handsets will become the remote control for people’s lives.

**SUPPLEMENTAL MATERIAL**

**Companies Interviewed For This Report**

| Acquity Group | PoetPainter |
| Cynergy Systems | Roundarch Isobar |
| EffectiveUI | SapientNitro |
| NavigationArts | TIAA-CREF |

**ENDNOTES**

1. To succeed in today’s digital environment, firms must deliver smarter, more customer-centric interactions that feel like they were tailored for each user and his or her specific set of circumstances. That's why firms need to evolve their thinking to focus on contextualization, which Forrester defines as: a tailored, adaptive, and sometimes predictive digital customer experience. See the November 19, 2012, “Contextualization” report.

2. More people access the Internet more frequently from more devices in more places than ever before, giving rise to always addressable customers who make up more than one-third of US online adults. See the September 26, 2012, “The Always Addressable Customer” report.

3. Going into 2012, Forrester noticed the emergence of services firms like Tableau Software and Visually — which provide large organizations with tools that help them create, manipulate, and share visualizations of complex data. Interactive agencies like R/GA also got into the action with data visualization practices. See the January 9, 2012, “Three Digital Experience Trends To Watch In 2012” report.

4. Service designers broadly define what they do as a collaborative process of researching, envisioning, and then orchestrating experiences that happen over time and across multiple touchpoints. Unlike traditional design disciplines, service designers typically examine — and often re-engineer — the strategy behind a service as well as the operational systems, processes, and resources that deliver it. See the December 20, 2010, “Service Design Creates Breakthrough Customer Experiences” report.
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