

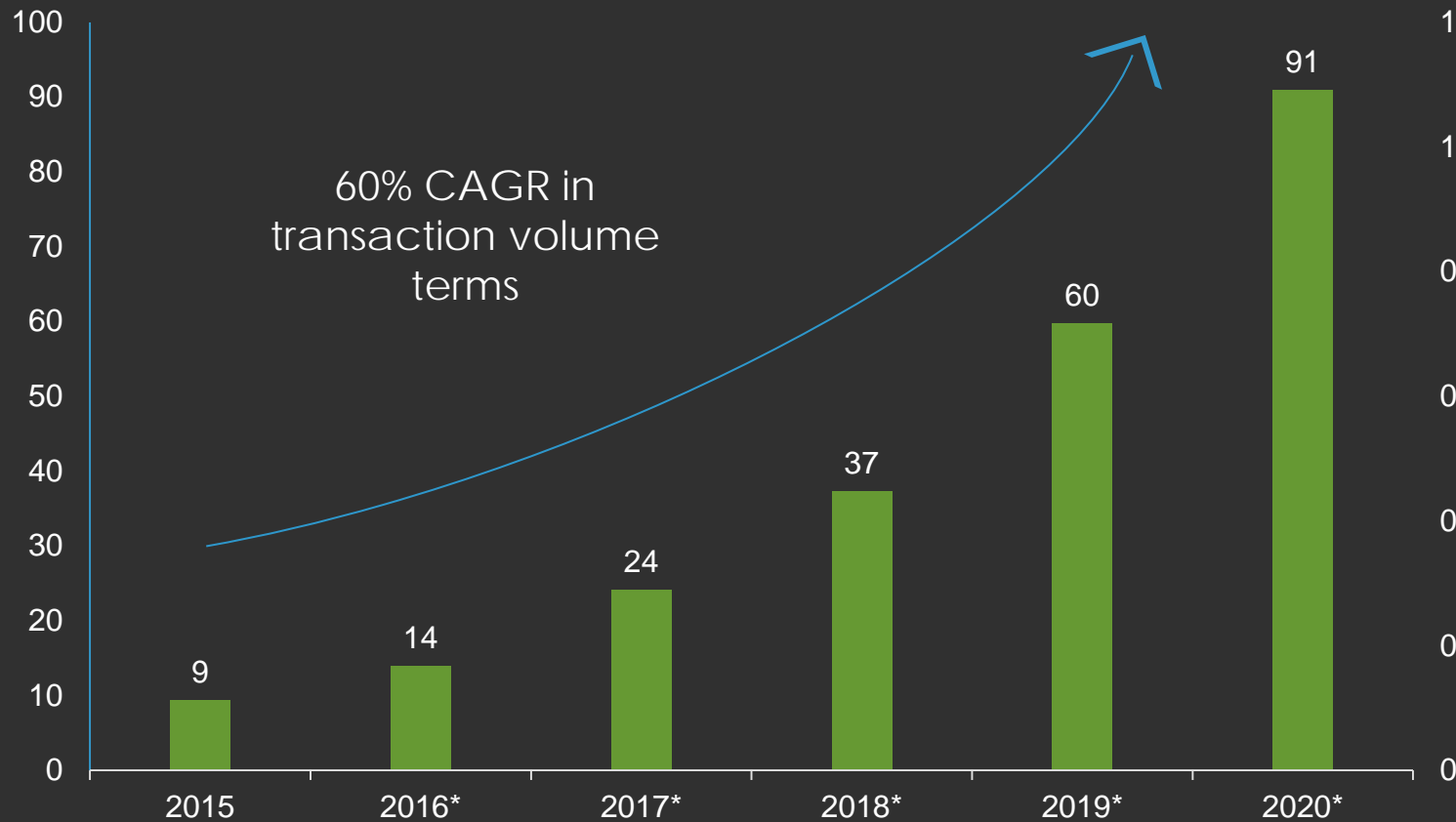
# Adobe eSignatures Indian Market Study

September, 2017



# Indian eSignature market forecast

## Indian eSignature Market Size in Revenue and Transaction



### 1.2 Key Drivers

- › Fastest IT spend growth among the major economies of the world – 8% in '17 and 10% in '18.
- › Rapid digitization of the economy.
- › Significant focus on customer experience and improving operational efficiency.

#### Assumptions:

- Based on total eSignature transactions in the Indian market from Forrester forecast
- Based on price per eSignature transaction using Forrester collected price data from vendors - and average of simple click wrap to KBA authentication

\*Forrester forecast

# There is a clear need for eSignatures which has not been addressed well by existing technology solutions

“The eSignatures statement that best applies to your enterprise”



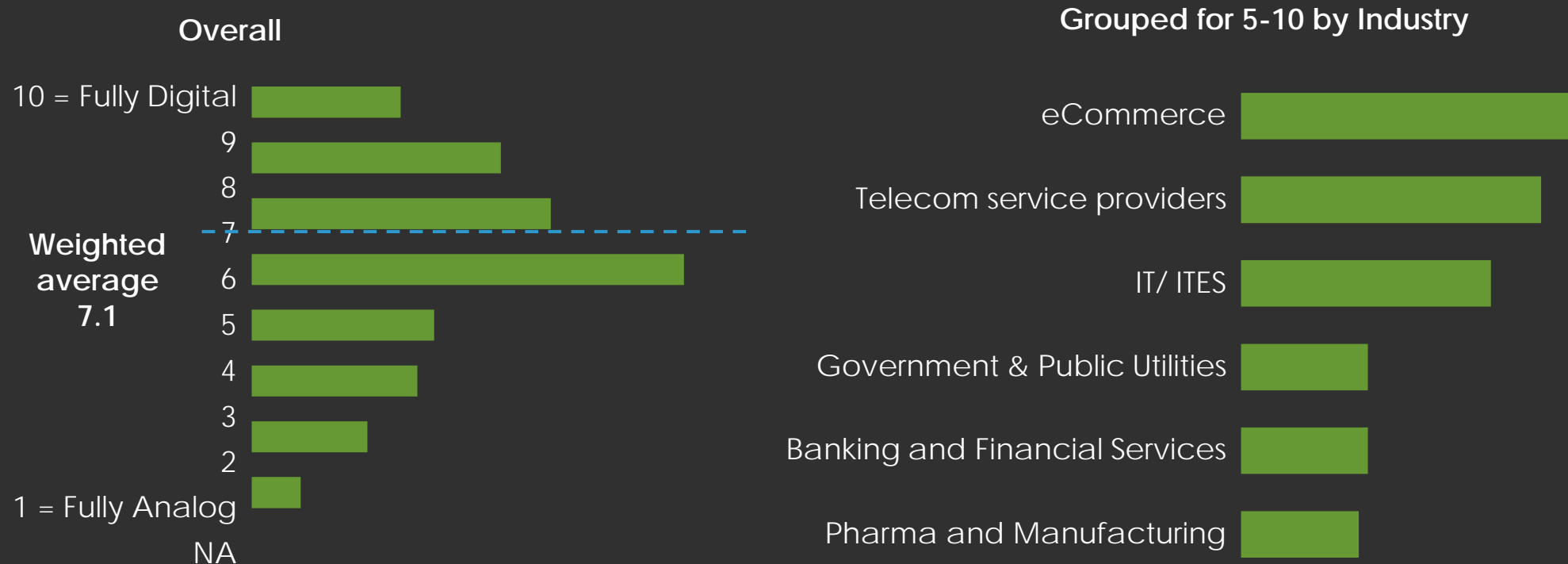
Base: 305 Business and IT decision makers and managers across regions and industries in India

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Most of the companies surveyed have started their digital transformation journey for electronic signatures

“Where would you say your firm is on a fully analog to fully digital spectrum, as regards eSignatures?”

(On a scale of 1-10 with “1” being fully analog and “10” being fully digital - select NA for don't know)

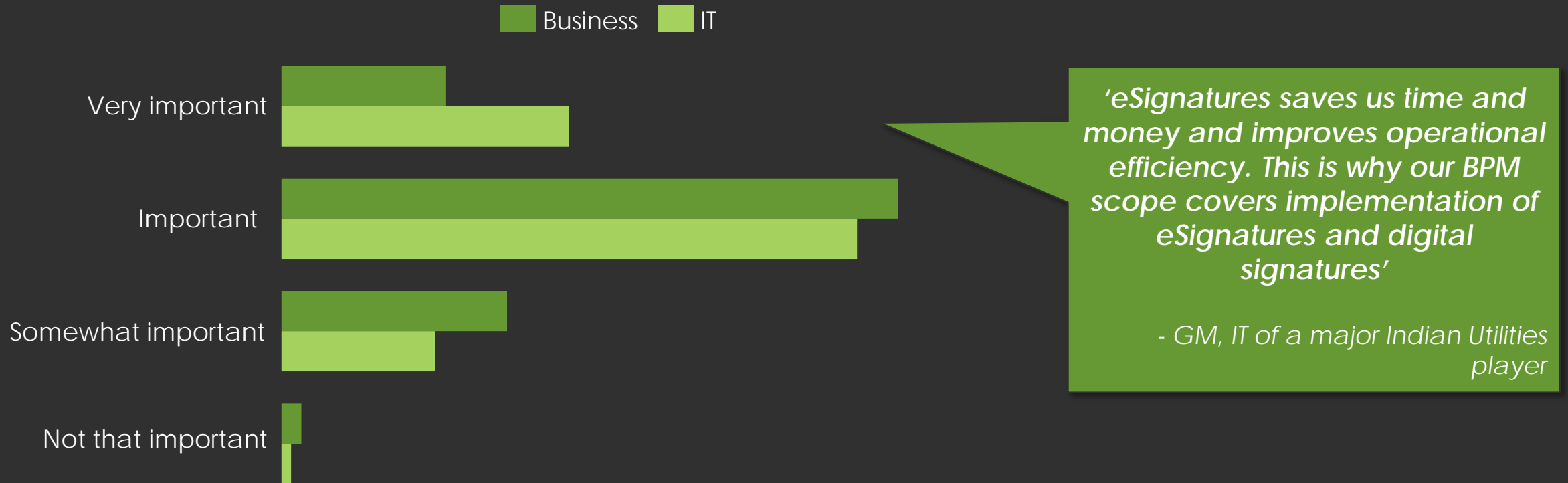


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# Majority of the business and IT leaders believe that having a complete digital experience is important

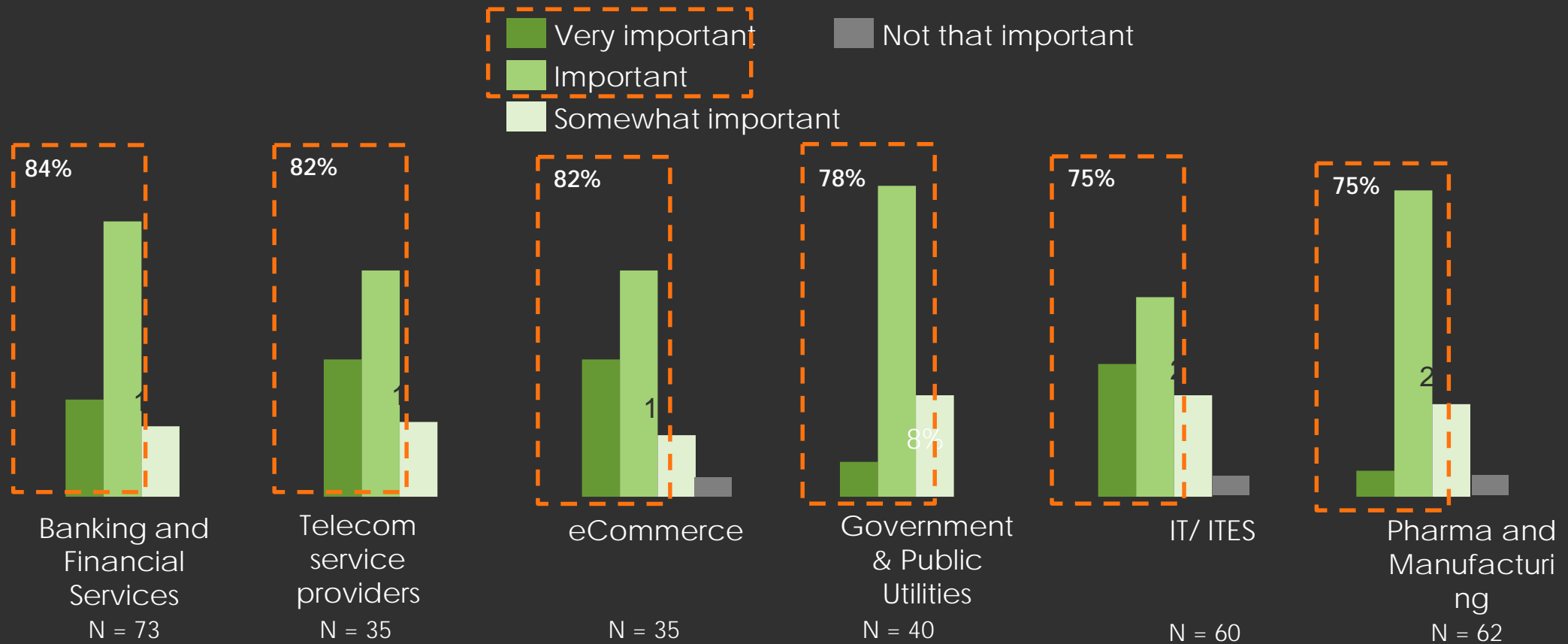
“How important to your enterprise is providing a complete digital experience – i.e., eliminating any wet signature process?”



Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Firms are keen to eliminate the wet signature process across industries

“How important to your enterprise is providing a complete digital experience – i.e., eliminating any wet signature process?”



Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Secured connection across organizations, analogue process replacement, and straight-through process automation are top three drivers that make eSignatures valuable

“What additional drivers may make eSignatures valuable to your company? ”

Help connect people across organizations in a secure manner



Help replace analog and paper-based processes to improve operational excellence



Help automate straight-through processes



Improve support for new digital products and services we are implementing



Help to connect cloud-based applications more quickly and easily



Improve support for new mobile apps that we plan to introduce to match advances in consumer technology



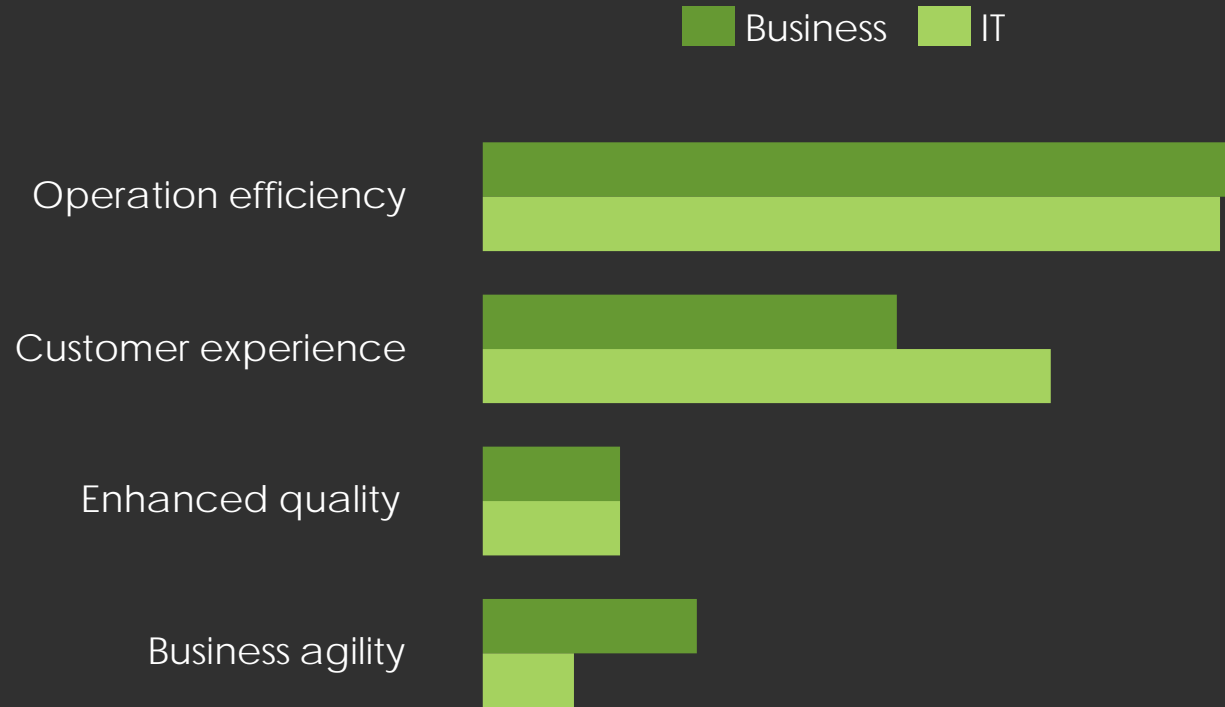
*'eSignatures saves time and logistics costs and improves inter-office communication'*

— GM, IT of a major Indian Utilities player

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Business leader believes 'customer experience' is where most of savings can be expected where IT thinks on operation efficiency

"In which of the four areas have you seen or expect to see the highest savings?"

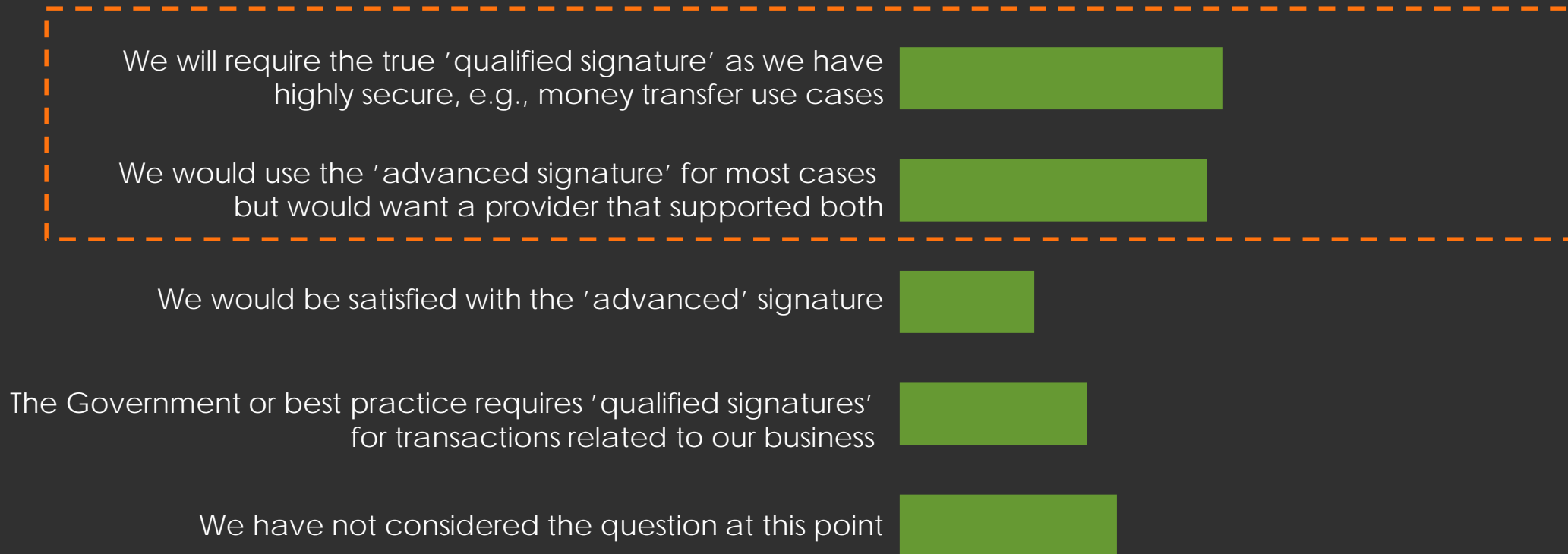


Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017



# More sophisticated signature solutions are required by most of the organizations surveyed

“Qualified signature and advanced signature use cases (rank up to three)”



Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Majority of the interviewees prefer their eSignatures SaaS hosting location to be in APAC or India

"Where are the ideal hosting locations for your SaaS solution? "



N = 144

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Aug, 2017

# 'Reliable in-country support is ranked as #1 attributes that buyers seek in an eSignature provider

"What are the key attributes potential buyers look for in an eSignature solution provider?"



*'Early adopters were internal communications but now digital signatures are widely used by even sales and marketing teams'*

*— CIO of a major Indian Bank*

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Adobe is the #1 vendor of choice when consider buying eSignatures solution

“Which are the top vendors enterprises would consider while making a buying decision? (Select at least 2)”



Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017

# Most of the companies interviewed are looking to invest in eSignatures solution in 1 to 2 years time

“What time period are you looking to make investments in eSignatures solutions?”



Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, Sep, 2017