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Customer Journey Optimization: The Key to Relevant Engagement

Media, entertainment, and communications firms look to create holistic customer journeys to compete in rapidly changing markets



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Summary

In brief

Omdia, in partnership with Adobe, interviewed CIOs, IT directors, and IT managers at 300 firms in North America, Europe, and Asia-Pacific in the media, entertainment, and communications (MEC) sector. The interviews were conducted in October 2019 across MEC subsectors including telecoms, pay and direct-to-consumer TV (D2C), and sports and gaming to determine their level of involvement and progress toward digital omnichannel customer engagement and the role of customer journey analytics to enable omnichannel experiences. The survey also sought insights to help highlight the critical technologies that create intelligent and connected customer journeys for proactive and relevant engagements. It also identified the barriers to progress from investments.

This white paper uses the results of the survey to examine the progress of the three subcategories in enabling connected journeys through integrated data, technology infrastructure investments, and customer journey visualization. It also reveals future investment plans and includes action items for the long-term success of the MEC category.

Omdia view

Today's consumer can determine where and when they want to buy and obtain support for their mobile, cable, and internet services; they are also always only a click away from switching providers if they are not satisfied with their experience. They expect relevant and personalized interactions driven by their current preferences, recent activities, and latest product and support experiences. By using insights from connected customer journeys, telecoms, D2C, and sports and gaming companies can better track the customer experience, make informed decisions, and proactively engage along their journeys. The data allows them to take a proactive approach toward customer satisfaction and pinpoint the causes of negative customer experiences to prevent them from happening again. By tapping into the data from customer journeys, enterprises in these sectors can gain a holistic picture of their customers to ultimately improve the customer experience (CX).

Investment that enables integrated data and holistic visualizations of customer journeys is becoming pivotal for these sectors, because competing on CX is a top requirement to remain competitive and retain customers. Platforms that link disparate data sources, aggregate and analyze the data, and make actionable recommendations will help enterprises in these subsectors gain a more holistic understanding of customers' behaviors and actions and therefore deliver personalized content and offers at the right time and right place. Businesses can then link structured and unstructured data back to their strategic objectives and quickly modify them to ensure they comply with evolving customer demands.

For enterprises in media, telecoms, and sports and gaming to completely understand their customers' journeys, they must gather data from many different channels and track the individual journeys of the customer experiences. This requires establishing connections across all data sources, digital and physical, including unstructured, text-based, machine or Internet of Things (IoT) data; mobile transactions; and social media. The faster and more broadly firms in the three subcategories can analyze customer data, the more likely they will be to get viable, actionable insights into customer behavior, attitudes, and sentiments to improve customer relationships and drive loyalty.

Key messages

- Competitive pricing, new business models, and device and channel proliferation serve as dominant threats among MEC's three subcategories.
- Across sectors, MEC's requirement is the same: intelligent customer connectivity.
- The presence of data-sharing tools, or the lack of them, correlates with advancements as well as with barriers to customer journey orchestration.
- Campaign orchestration and workflow limitations persist.
- Despite barriers, enterprises are progressing toward enabling connected customer journeys.
- Investments in omnichannel are an indicator of improved engagement.
- The process of operationalizing the customer journeys is beginning to take shape.

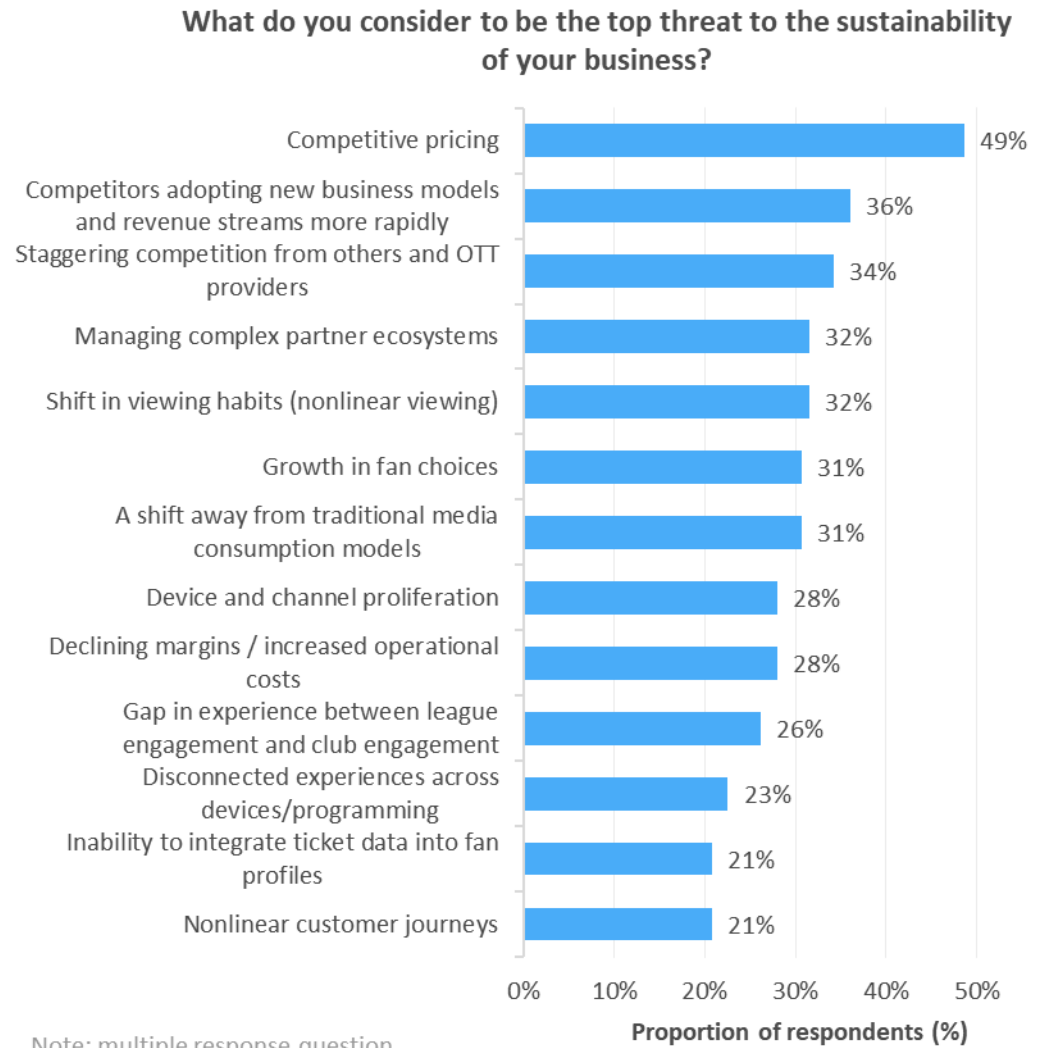
Competitive pricing, new business models, and device and channel proliferation threaten traditional operating models

Telecommunications faces period of upheaval

Today's fast-evolving market and increasingly savvy audiences are creating sustainability challenges for enterprises. There are many disruptors working to test the viability of enterprises, from increasing content choices to enabling mobility.

The telecommunications industry, for instance, finds itself in a period of upheaval as new technologies, new competitors, and new consumer expectations disrupt tried and tested ways of working. As the findings in this survey show (see Figure 1), the sources of upheaval vary. Telecoms faces the most dominant threats from competitive pricing (49%), competition adopting new business models rapidly (36%), staggering competition (34%), and managing complex partner ecosystems (32%).

Figure 1: Telecoms sector cites competitive pricing as a significant threat to sustainability



Source: Omdia and Adobe

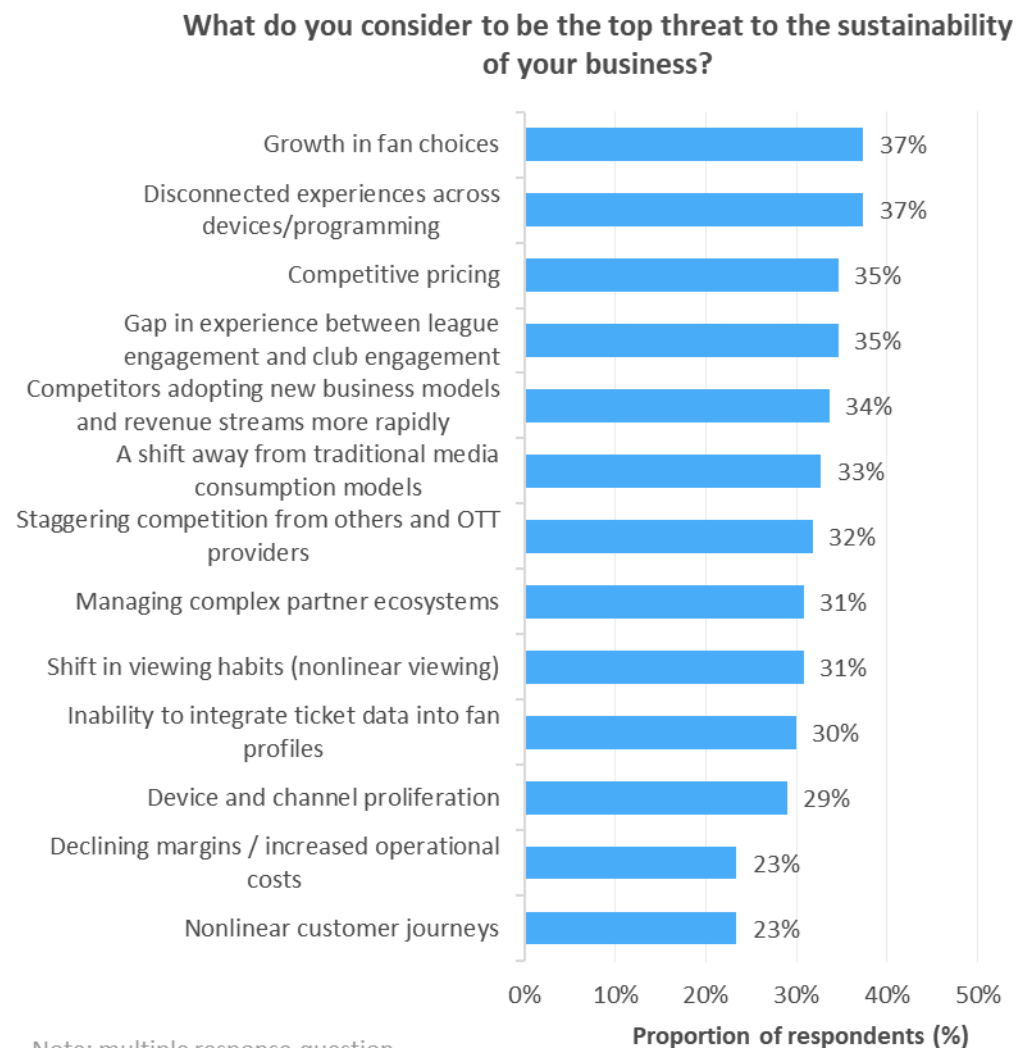
Sports and gaming must quickly adopt new revenue streams

While the telecoms sector faces rising pressures from competitive pricing, the sports and gaming subcategory must manage different types of threats. In such a rapidly changing industry with growing audiences ripe for advertising dollars, sporting franchises and gaming platforms must create brand loyalty and engaging platforms to keep spectators and gamers participating well into the future.

Sports and gaming enterprises, however, face rising competition that will force them to continually innovate to appeal to audiences (see Figure 2). In fact, the biggest threats

come from growth in fan choices (37%), disconnected experiences (37%), competitive pricing (35%), and the gap in experience between league and club engagement (35%).

Figure 2: Sports and gaming cites competitors adopting new business models as a top threat



Source: Omdia and Adobe

Pay and D2C TV confront shifting dynamics

Like sports and gaming, the pay and D2C TV sector is also experiencing fast-changing dynamics. With digital disruption occurring across content creation, distribution, and monetization, survival for these companies means responding quickly to their new realities in an increasingly highly competitive environment. The resulting mandate in this space is gaining the ability to reach the right audiences, at the right time, on the right device, with the right monetization model, all while continually innovating in this complex environment.

This hyperpersonalization directive grows even more complex given the myriad threats that pay TV faces. In pay and D2C TV (see Figure 3), the top threats include competitors rapidly adopting new business models and revenue streams (33%), device and channel proliferation (32%), competitive pricing (31%), and managing complex partner ecosystems (30%).

Figure 3: Pay TV and D2C face competition from OTTs and device and channel proliferation



Source: Omdia and Adobe

Across sectors, MEC's solution requirement remains the same: intelligent customer connectivity

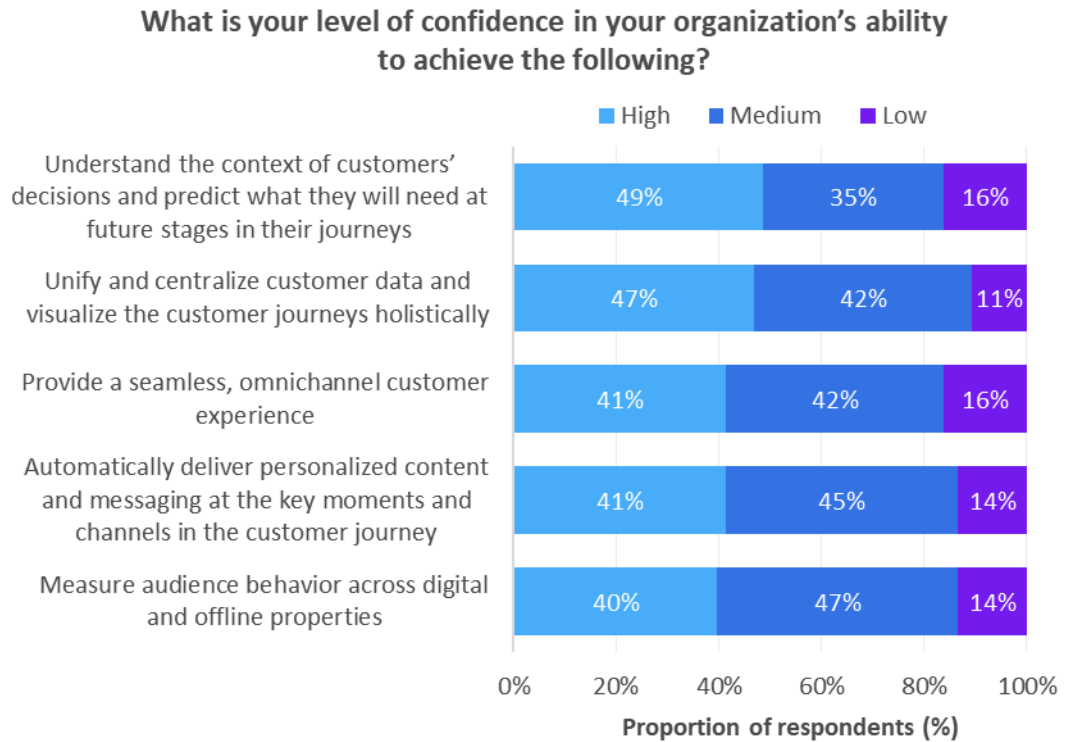
Fewer than half in telecoms are highly confident in their ability to enable omnichannel

While they are very different, the threats all share common requirements for sustainability: connect the customer ecosystem; understand customers' intent, needs, and consumption activities through integrated customer profiles; and have the ability to proactively respond to activities throughout their journeys.

To succeed in their new continuums, each subcategory requires mechanisms and capabilities that help distill information about their customers to understand their buying journeys but that also proactively orchestrate relevant offers and communications at the right times and places in their journeys. This requires having the ability to unify, centralize, and visualize internal and external customer data.

Despite the criticality of having such capabilities, fewer than half (49%) of respondents in the telecoms sector indicated they felt confident about their organization's ability to understand the context of customers' decisions and, therefore, to predict what they will need at future stages of their journeys (see Figure 4). Additionally, 16% demonstrated low confidence. Fewer than half (47%) said they have a high degree of confidence in their ability to unify and centralize customer data and visualize customer journeys holistically, while 42% have medium confidence, and 11% demonstrate low confidence.

Figure 4: Telecoms demonstrates the most confidence in the ability to understand customer context

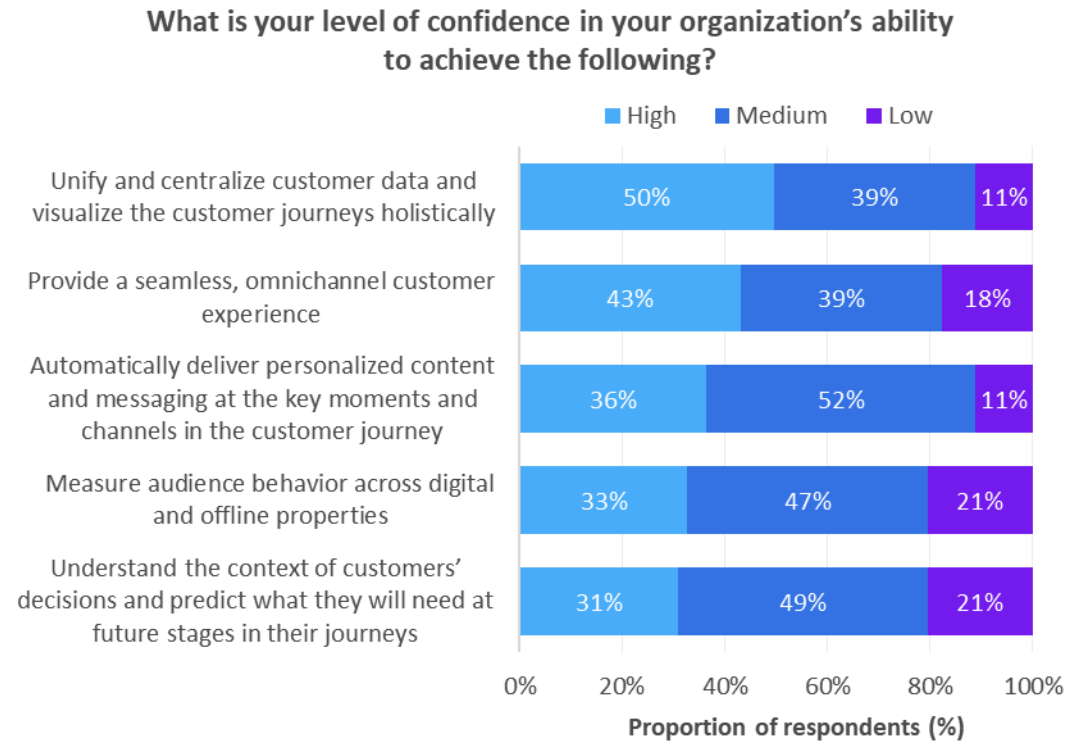


Source: Omdia and Adobe

Confidence levels differ among sports and gaming companies on their ability to deliver omnichannel experience

Insights from the sports and gaming subcategory reveal that half of respondents (50%) maintain a high level of confidence in their ability to unify and centralize customer data and visualize the customer journeys holistically (see Figure 5), with 39% reporting a medium level of confidence and 11% saying they have low confidence. A couple of capabilities may pose challenges for this category. The ability to automatically deliver personalized content and messaging at key moments and channels in the customer journey garnered medium confidence (52%) and low confidence (11%). Forty-nine percent of respondents indicated a medium level of confidence in understanding the context of customers’ decisions and predicting what they will need at future stages of their journeys. Notably, 21% said they have low confidence in their ability to measure audience behavior across digital and offline properties.

Figure 5: Sports and gaming showed high confidence in the ability to unify customer data



Source: Omdia and Adobe

For pay and D2C TV providers, confidence in the ability to provide omnichannel customer engagement wanes

Unlike the other two subcategories, pay and D2C TV garnered the lowest percentage of respondents that indicated they have high confidence in their ability to unify and centralize customer data and to provide a unified customer experience (see Figure 6). Responses indicate that 45% demonstrate a high level of confidence in their ability to unify and centralize customer data, and 38% are highly confident they can provide a seamless omnichannel customer experience. Such capabilities are critical for this subcategory to succeed, because engaging consumers in new experiences and with hyperpersonalized content requires a deep commitment to connecting the dots along their customer journeys, enabled via both technology and data.

Figure 6: Pay and D2C TV showed the highest confidence in the ability to unify customer data



Source: Omdia and Adobe

The presence or lack of data-sharing tools correlates with advancements and to barriers to customer journey orchestration

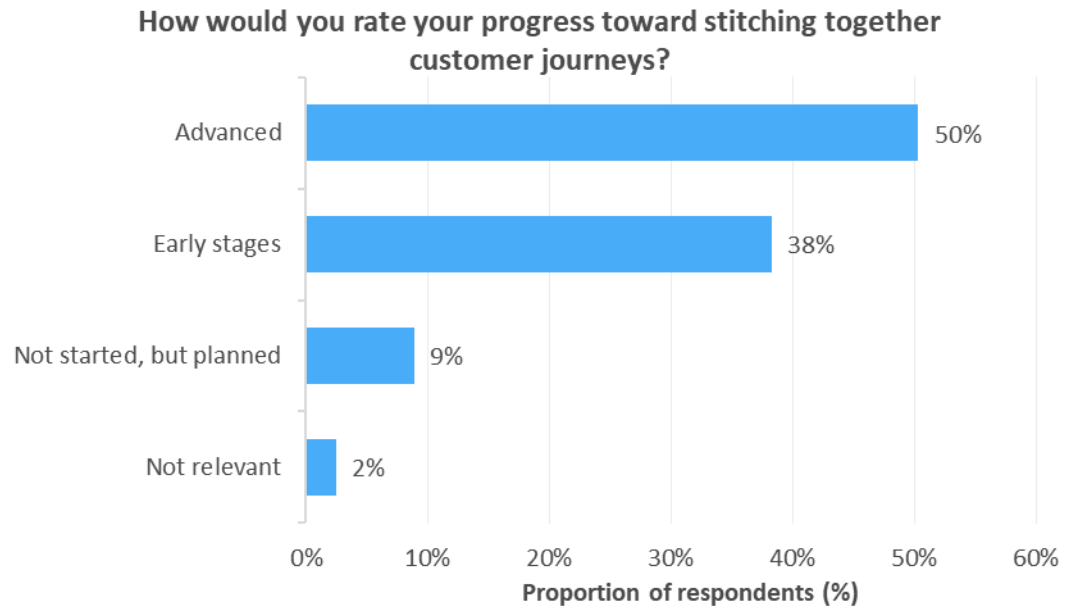
Omnichannel CX leaders possess adequate tools and CX engagement strategy

The strength of the “end-to-end customer journey” approach is the recognition that customers do not view their experiences with a brand as a discrete set of disconnected interactions: they are cumulative experiences, with each new interaction reshaping their opinion. From this perspective, it becomes imperative to manage the relationship holistically from the awareness stage through targeted content and acquisition with the relevant offers and nurturing with personalized interactions and service. But only half (50%) of respondents rated their progress toward stitching together customer journeys as being advanced (see Figure 7). Additionally, 38% said they remained in early stages, 9% have not yet started, and 2% said they do not believe it is relevant.

Of those that said their customer journey progress is advanced, 60% said having the tools, technologies, and modern platforms in place to enable connected customer pathways (see Figure 8) was a significant contributor. And 51% of those that are advanced said their leadership had a clear strategy in place for customer engagement.

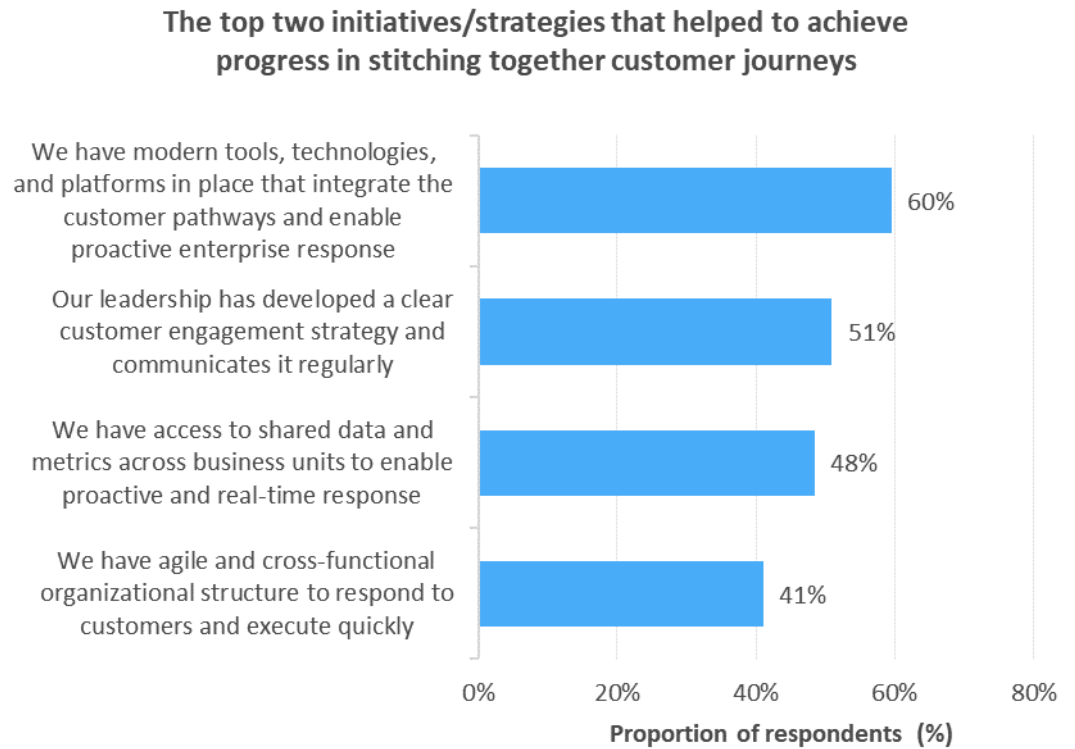
As delivering relevant customer engagement becomes increasingly widespread, the intelligent enterprise will take on greater importance than ever before and will require service providers to innovate at an accelerated pace. This requires a move to enable a holistic customer journey approach and to broaden journey orchestration capabilities to extend across the enterprise. Organizations must also make data, insights, and customer scores culled from journey management approaches available and accessible to the key stakeholders along the customer journey.

Figure 7: Half of respondents said their progress with connected customer journeys is advanced



Source: Omdia and Adobe

Figure 8: Modernizing technologies help to advance customer journey initiatives



Note: multiple response question

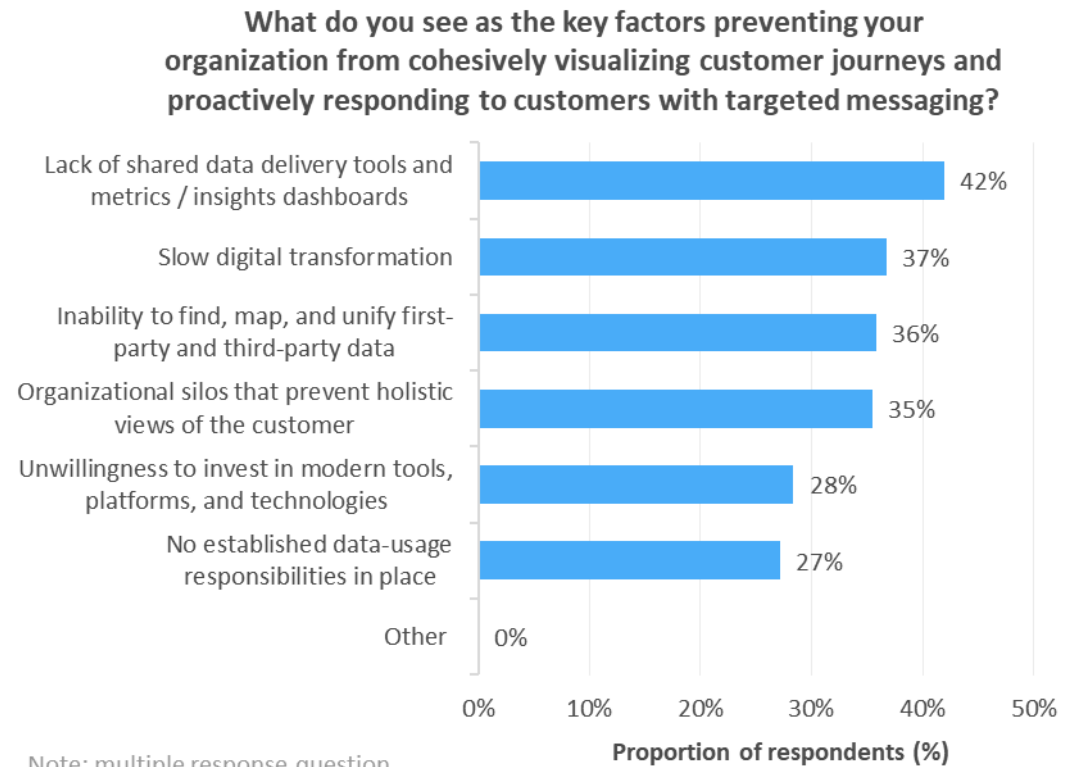
Source: Omdia and Adobe

Lack of shared data delivery remains pervasive across sectors

Many customer journey activities are often isolated to the contact center and fall short of optimizing the end-to-end customer journey. To connect the dots on customers' behaviors and activities across devices, channels, and the enterprise, organizations must integrate, operationalize, and democratize the customer data.

Results from this survey reveal an inability to share insights as a fundamental factor preventing cohesive visualization of customer journeys (see Figure 9). Overall, those who remained stalled in connecting their customer journeys and responding at critical moments reported a lack of shared data and delivery tools (42%); slow digital transformation (37%); an inability to find, map, and unify first- and third-party data (36%); organizational silos that prevent holistic views of the customer (35%); an unwillingness to invest in modern tools and platforms (28%); and a lack of established data usage responsibilities (27%).

Figure 9: Lack of shared data is a key factor in enabling cohesive customer journeys



Source: Omdia and Adobe

Transformational leadership and access to real-time data rank highest for critical enablers of holistic journey management

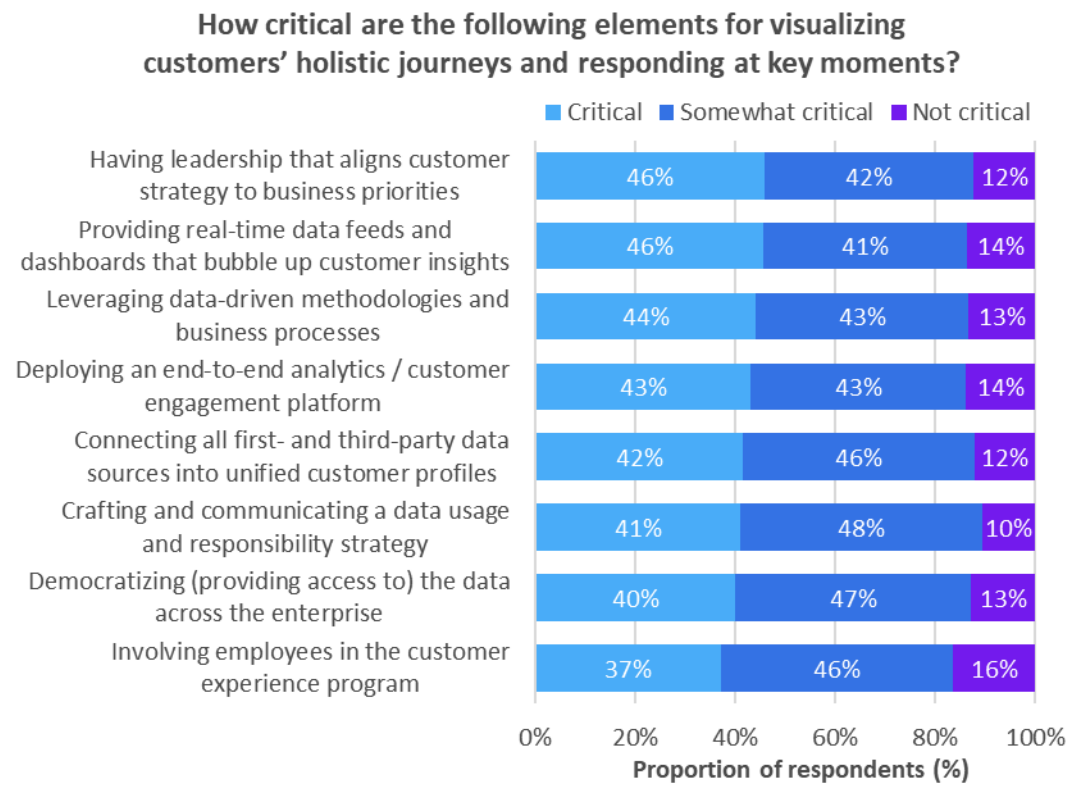
Many companies are doubling down on the front lines of customer interactions, but very few are taking the more holistic path to tightly connecting their entire enterprise. Getting there requires top-down strategy and leadership. The executive team must define a clear vision, align the organization behind it, and make the company’s people and culture a priority.

The findings from this survey highlight the critical nature of having leadership that aligns with customer strategy. When asked to cite the most critical elements necessary for visualizing holistic customer journeys, 46% said having leadership that aligns customer strategy to business priorities (see Figure 10), and 42% said it was somewhat critical.

Providing real-time access to data is equally as important as leadership that aligns customer strategy with business priorities. Of those that cited having access to real-time data feeds and dashboards that provide customer insights, 46% said it was critical, and 41% said it was somewhat critical. Reinforcing the need for connected and actionable data to enable holistic customer journeys, 44% said it was critical to leverage data-driven

methodologies, 44% said it was critical to connect all first- and third-party data sources into unified customer profiles, and 40% said it was essential to democratize (provide access to) data across the enterprise.

Figure 10: Holistic customer journeys require leadership that ties journeys to business priorities



Source: Omdia and Adobe

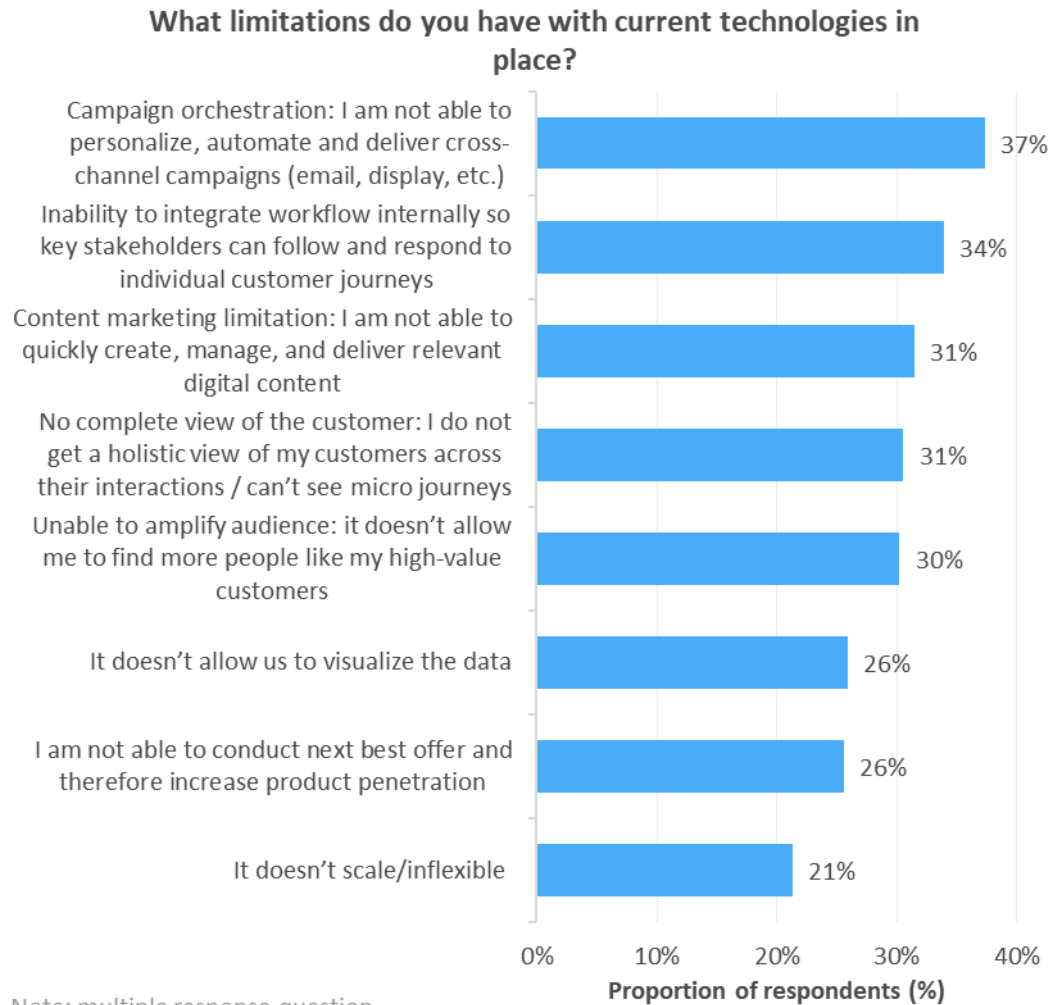
Campaign orchestration and workflow limitations persist

Technology constraints prevent omnichannel orchestration

When sustainability becomes part of an enterprise's central ethos, the enterprise will create new, previously unseen, opportunities and infuse the workplace with the tools to manage complex customer journeys. That is largely fueled by investments in modern technology. Enterprises need tools to automate the path, create real-time proactive personalized experiences across devices and channels, and inspire positive sentiment and loyalty along the way. If employees encounter barriers when using their tools, then efforts toward connected customer engagement will fail.

In fact, many respondents indicated an array of limitations with their current technologies that prevent customer journey orchestration (see Figure 11). Consequently, 37% said they are unable to personalize, automate, and deliver cross-channel campaigns; 34% said they are unable to integrate workflow internally; 31% said they cannot quickly create, manage and deliver relevant content; another 31% said they do not have complete views of the customer; and 30% said their technology does not allow them to find prospects like their current high-value customers.

Figure 11: Cross-channel campaign delivery is a top challenge to customer journey orchestration



Source: Omdia and Adobe

Planned investments in omnichannel serve as an indicator of improved engagement

Customer experience is a core concern to many enterprises across all industries and sectors, and Omdia sees an emerging pattern of evolution toward a genuine customer-centric focus on the customer's desired outcomes. Enterprises fixated on this objective may continue to adopt point solutions, department by department, but those that recognize the primacy of the customer will seek platforms that enable them to deliver a coherent and orchestrated customer experience regardless of the department or channels the customer touches. They will focus their collaborative efforts on helping customers achieve their desired outcomes, and they will be rewarded with less churn and higher growth as a result.

A promising 42% of respondents said they are investing in omnichannel solutions as a top innovative strategy (see Figure 12). Additional evidence around a move toward enabling open and integrated enterprises emerges: 36% said they are restructuring their organizations to be agile, scalable, and customer centric; 35% are embracing new business models; and 33% are partnering to create a digital ecosystem.

Figure 12: Investments in omnichannel represent a primary undertaking



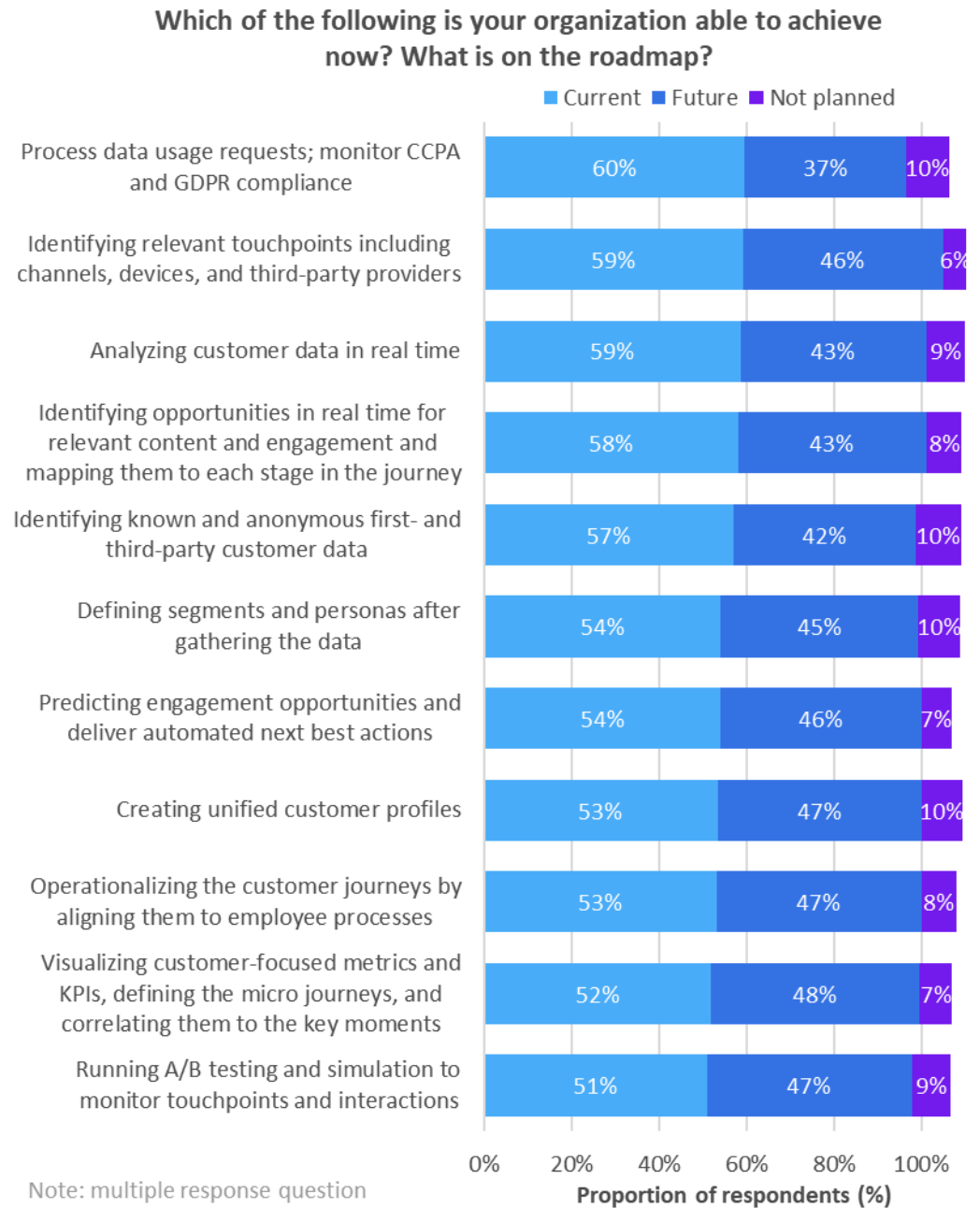
Source: Omdia and Adobe

The process of operationalizing the customer journeys is beginning to take shape

Investments in these strategies appear to be paying off (see Figure 13). Some results to support that claim include 59% saying they can identify relevant touchpoints including channels, devices, and third-party providers; 59% saying they can analyze data in real time; 58% saying they can identify relevant opportunities in real time for content engagement; 57% being able to identify known and anonymous first- and third-party data; and 52% being able to visualize customer-focused metrics and micro journeys and correlate that to key moments.

Future roadmap plans also point to a focus on enabling omnichannel (see Figure 13). Activities such as operationalizing the customer journeys, visualizing customer-focused metrics, and creating unified profiles will see growing investments: each area showed 47% of respondents planning to invest.

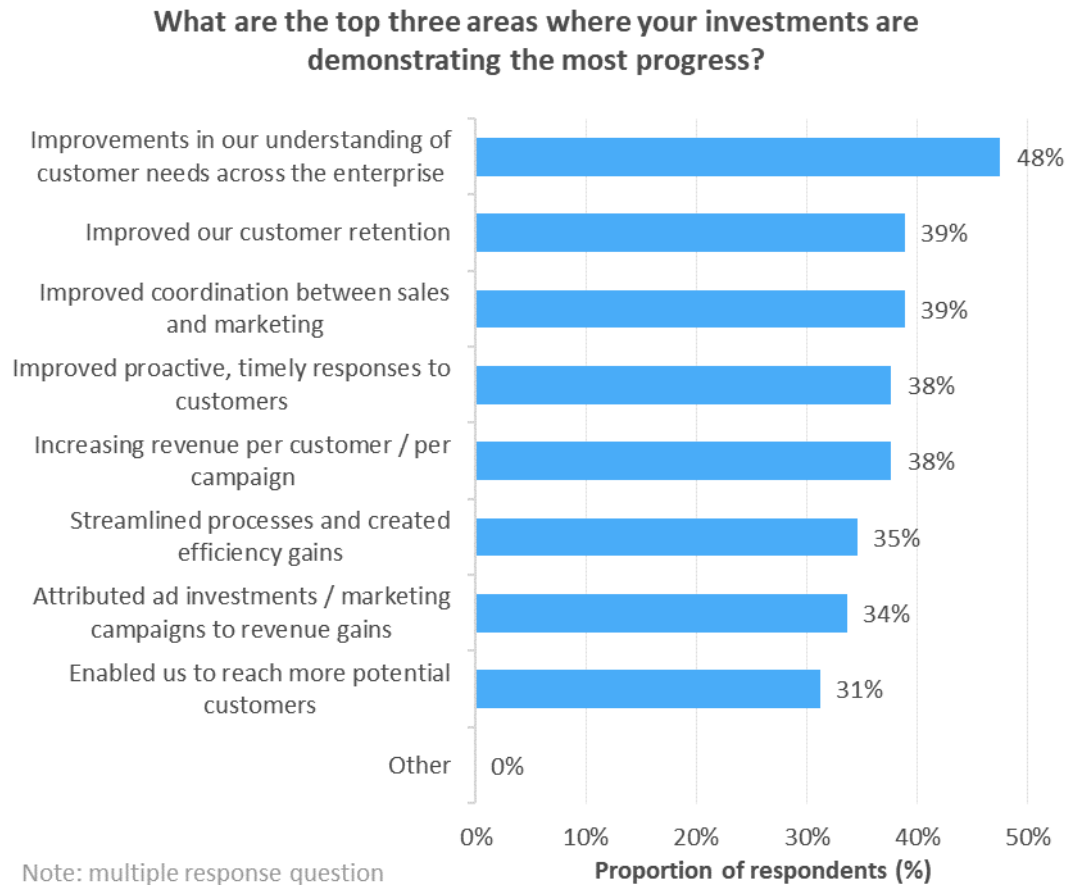
Figure 13: Investments in unified data will gain momentum in 2020



Source: Omdia and Adobe

These achievements can be correlated to progress made toward enabling omnichannel customer engagement and journey orchestration (see Figure 14). Of respondents, 48% said they have seen improvements in their ability to understand customer needs across the enterprise, 39% have improved customer retention, 39% have improved coordination between sales and marketing, 38% have improved timely and proactive responses to customers, and another 38% have increased revenue per customer.

Figure 14: Technology investments lead to improvements in understanding customers' needs

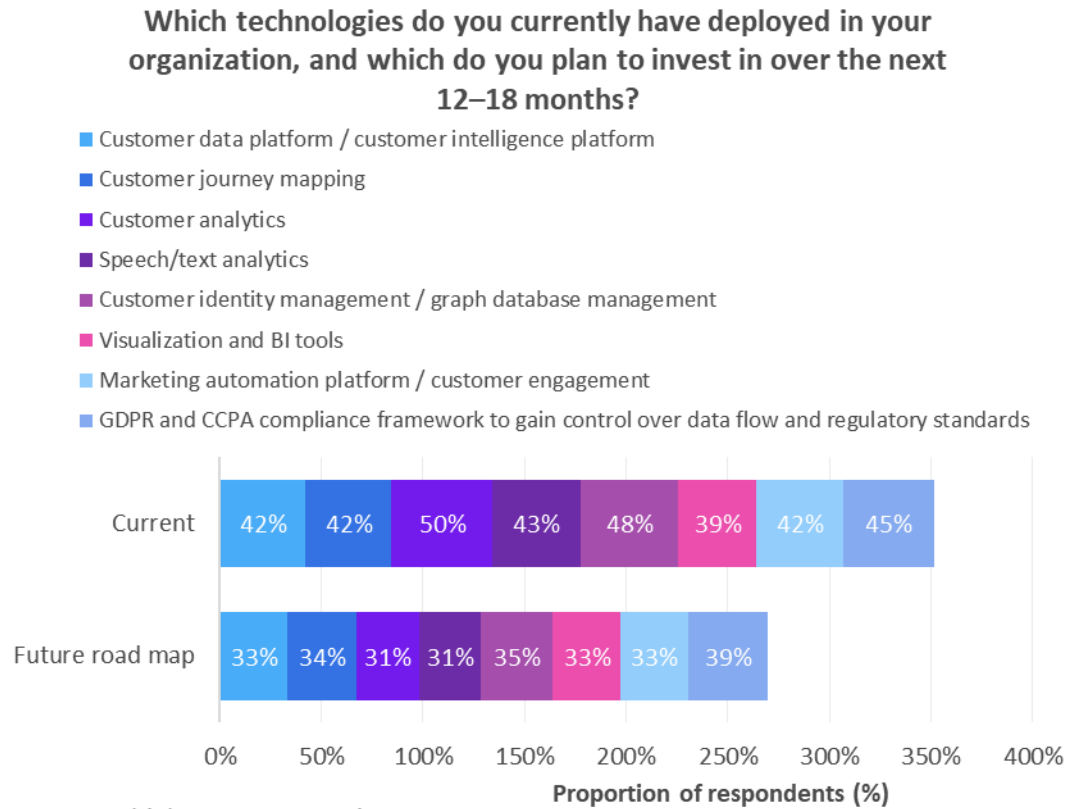


Source: Omdia and Adobe

Such progress means the MEC category is moving beyond brand building to accelerating customer acquisitions, boosting engagements and lifetime value, and reducing churn. By connecting operational and customer data, insights, and experiences, these enterprises are better equipped to monitor, manage, and respond to the end-to-end customer journey.

In their fast-paced markets, however, staying competitive and keeping customers loyal requires continual innovation and technology modernization. Most investments currently are in the areas of customer analytics and customer identity management (see Figure 15), as enterprises seek to better understand customers' needs along their journeys.

Figure 15: Data compliance frameworks will be the largest area of investment in 2020



Source: Omdia and Adobe

Adopting a holistic, agile, and CX-led organization also requires understanding the metrics that matter, communicating the value to the broader business and stakeholders, and building a foundation of insights culled from the combination of first- and third-party data and made accessible across business units. The enterprises that will be able to proactively engage with customers based on their needs will be able to orchestrate omnichannel experiences that motivate consumers in the most relevant channel and device.

Conclusion

Six imperatives for customer journey orchestration

By connecting operational and customer data, insights, and experiences, MEC firms will be better equipped to monitor, manage, and respond to the end-to-end customer journey. Achieving holistic engagement requires moving beyond acquiring new customers to delivering an experience at every step of the customer lifecycle. Success depends not just on accessing the data from first- and third-party sources but also on orchestrating the appropriate actions across all channels at the right time.

Therefore, it is no longer enough to simply visualize the journeys: enterprises must respond to key moments in real time and proactively anticipate customers' next moves, understand which channels they intend to use, and be ready with relevant content, offers, or remedies. Below are six imperatives for holistic and actionable customer journey orchestration to take hold within enterprises.

Create a data-driven enterprise

Many organizations lack a comprehensive data strategy. As a result, they might invest in marketing and CX technology only to find that, despite an abundance of data, they cannot effectively improve the customer experience or drive revenue growth. While data is essential for personalization and customer journey orchestration, just having a lot of data is not enough. Leveraging customer data calls for a structured approach to data management.

This requires understanding the metrics that matter, communicating the value to the broader business and stakeholders, and building a foundation of insights culled from the combination of first- and third-party data and made accessible across business units. Then enterprises will be able to engage with customers based on their needs. In achieving this synchronicity, enterprises will be able to proactively and predictively orchestrate omnichannel experiences that motivate consumers in the channel of their choice.

Achieving such goals means enterprises must first become data driven as part of a corporate mandate. Data-driven organizations have extended the use of data across everyday business functions from the C-suite to the front lines. Rather than hoping that executives, managers, and employees will use customer feedback and business insight, companies that are serious about the use of data are training employees and creating enterprise-wide data strategies. Because their ability to compete effectively depends on their ability to leverage data, such data-driven organizations make a point of aligning their values, goals, and strategies with their ability to execute.

Create unified customer profiles

Customers today use so many different channels to interact with brands that if the information on those channels is not carefully tracked and associated with a single

unified profile for each customer, it often results in multiple identities for the same customer and a failure to “connect the dots.”

An enterprise that wants to engage with prospects and customers proactively and contextually before issues happen or products are purchased must create an identity master for every user, known and unknown. Many also add several key attributes for segmentation, attribution, and user conversion. These attributes include cookie ID, global cookie id, IP address, UTM parameters (tracking tags at the ends of URLs), custom attributes, website metadata (description, titles, etc.), and many other fields.

After identities of known and unknown customers and visitors are resolved, the enterprise must be able to create universal and persistent consumer profiles and assign persistent identifiers. Then it must leverage appropriate approaches (deterministic and probabilistic matching) to connect information about the individuals. Deterministic matching stores multiple identifiers known to belong to the same person and links them to a shared ID (typically the persistent ID). Probabilistic matching applies statistical methods and rules to associate multiple identifiers that appear to relate to the same person.

Then, by layering on descriptive data such as lifestyle and career information, quantitative data such as transactional and online activity, and qualitative data such as surveys and Net Promoter Score (NPS), the enterprise can enrich the profiles by expanding and deepening the identities to form a more complete picture. This enables interesting analysis and insights and informs future campaigns and engagement strategies. The resulting customer profiles, or golden customer records, represent a holistic view of customers’ behaviors and transactions.

[Invest in artificial intelligence \(AI\) and analytics](#)

In their quest for connected, intelligent customer experiences, enterprises should begin to build upon core data integration use cases and start investing in the systems that enable them to create precise audiences for activation. This requires leveraging AI-powered decisioning for orchestrating buyer journeys. Using AI and customer journey orchestration together can bring tremendous benefits to MEC firms such as creating a more valuable customer experience.

Intelligent orchestration requires customer journey maps to be embedded with machine learning algorithms that can be used to identify the patterns in the customer data from different sources. By creating a machine learning model, firms can observe and learn what customer interactions and behaviors create the most valuable customers by observing, for example, how they travel between channels or interact with messaging. They can then help classify a customer behavior to a matching persona in real time and, when layered with AI, can enable automation and intelligence throughout an enterprise.

While AI targeted at specific use cases adds value, continuous advancement will only occur if the AI is embedded across applications. Only an integrated ecosystem of AI solutions, powered by an end-to-end automation backbone connecting a variety of enterprise systems (IT, finance, supply chain, etc.), will make impactful business outcomes materialize as expected.

As AI becomes embedded across functional areas, the intelligent enterprise will take on greater importance than ever before. MEC enterprises will more accurately and rapidly

pinpoint issues before they surface, identify optimal alternatives, and pursue them, in many instances without the need for human intervention.

Expand partner ecosystems

As MEC enterprises look to digitally transform their businesses and to scale the continuously shifting competitive landscape, their focus will move toward solutions that deliver complete business outcomes. This creates a unique window of opportunity for strategic partnerships.

As next-generation offerings begin to proliferate across the industry, complexity in product offerings will increase, as will the need for broader integration. This will inevitably lead to a convergence of partner functions in both consulting and service-based offerings and to embedded technologies across the partner ecosystem.

Many digital ecosystems involve partnerships from a broad range of industries, but success clearly depends on scalability and flexibility to bring in partners from a broad variety of industries. The orchestrator of a winning ecosystem must manage dozens of partners, across multiple industries and countries, and different types of relationships. Therefore, selecting and managing the right mix of collaborations is critical for success.

Connect and visualize customer journeys

The strength of the end-to-end customer journey approach is its recognition that customers do not view their experiences with a brand as a discrete set of disconnected interactions: they are cumulative experiences, with each new interaction reshaping their opinion. From this perspective, it is imperative for MEC firms to manage the relationship holistically (from the awareness stage through targeted content, the acquisition stage with the relevant offers, and the service and nurturing stage with personalized interactions and service).

That requires enterprises to provide visualizations of events and insights occurring throughout various journey stages across the enterprise to drive customer interactions and view gaps in experience. Such visualizations should enable adaptations of customer behavior as journeys progress to uncover what is working and map out next best actions to occur at key moments.

Visualization should also make the data, insights, and customer scores culled from journey management approaches actionable. They should be available and accessible to the key stakeholders along the customer journeys. Visualizations should graphically depict journeys that are contextually relevant to employees' roles in the form of geographical maps, pivot tables, or heat maps to present data discoveries for customer profiles and offer the ability to explore and drill down into the data to make real-time decisions. This will also create transparency and will motivate employees to actively engage in critical moments to improve the customer experience.

Accelerate innovation

In the experience economy, enterprises must compete on the experiences they are providing around their products and services. This requires continual innovation as a key issue for business strategy, because it triggers competitiveness and firm performance.

When organizations take a customer-centric perspective and are aligned around the customer, design thinking and collaborative innovation management begin to take shape. Once journeys are connected and optimized, enterprises will gain a framework to drive

greater customer insights, improve internal efficiencies, enhance opportunities, and increase conversions.

Additionally, with a connected data layer in place, silos are eliminated, giving organizations real-time insights they need to make the best decisions quickly. This also translates into increased business agility, giving enterprises the ability to pivot quickly as market dynamics and business needs shift. Then, MECs can leverage insights in real time from their connected journeys and build agile and adaptive enterprises that can thrive in the digital age.

Appendix

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Omdia consulting

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We create business advantage for our customers by providing actionable insight to support business planning, product development, and go-to-market initiatives.

Our unique combination of authoritative data, market analysis, and vertical industry expertise is designed to empower decision-making, helping our clients profit from new technologies and capitalize on evolving business models.

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We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Omdia's consulting team may be able to help your company identify future trends and opportunities.

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Adobe Experience Cloud is a collection of best-in-class solutions for marketing, analytics, advertising, and commerce. The solutions are integrated on a cloud platform, along with service, support, and an open ecosystem, to enable organizations to obtain integrated and holistic data for delivery of relevant and proactive customer experiences.

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