High performance. Delivered.

Accenture Analytics

Customer Analytics Survey - Geographic Findings

May 2011

Survey Method
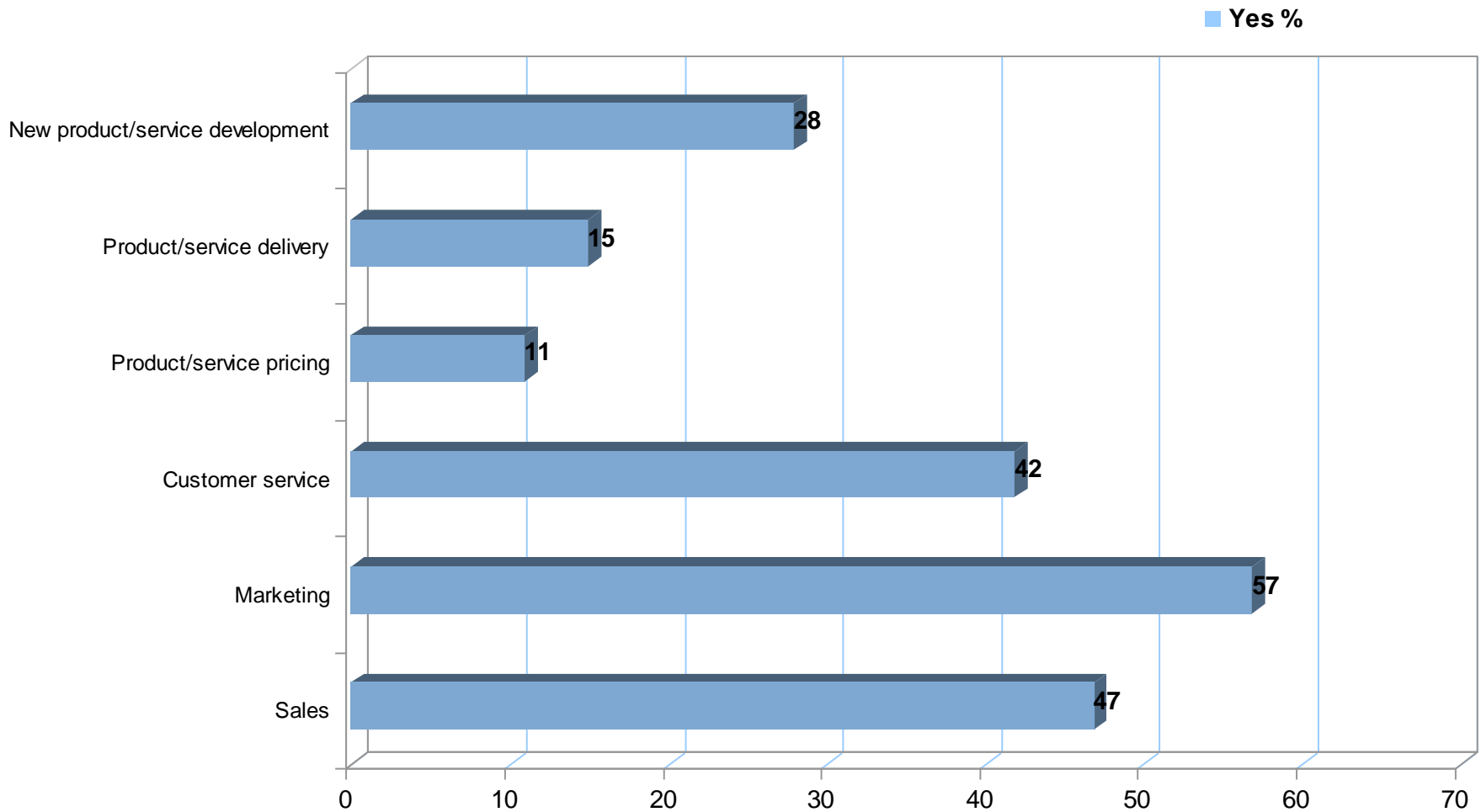
- This presentation is based on a total of 800 interviews, broken down by country as follows:

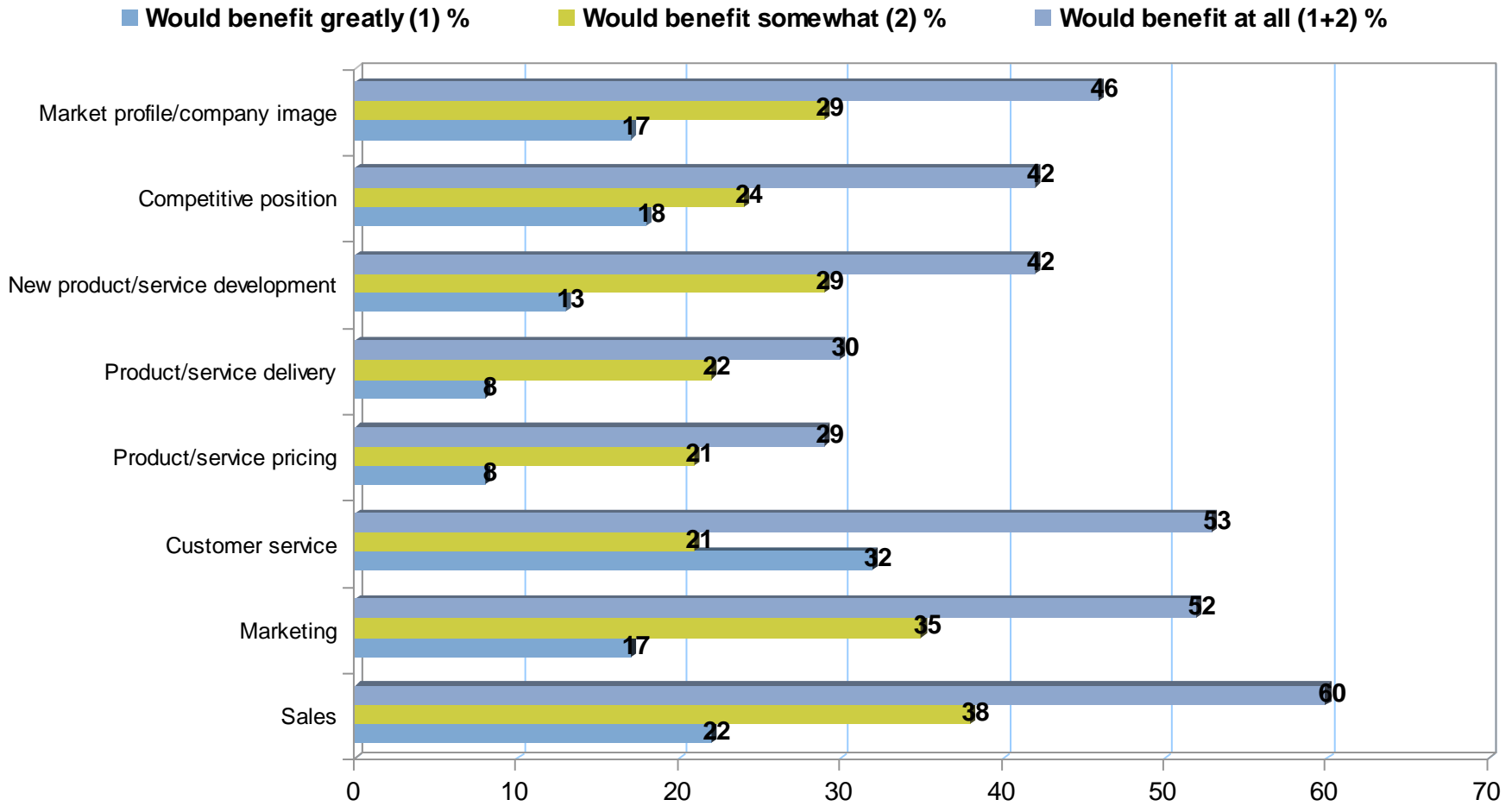|			
US/Canada	100	Spain	100
UK and Ireland	100	Brazil	100
Germany	100	China	100
Italy	100	Japan	100

- Respondents were directors or senior managers in major, blue chip organizations in each country, with responsibility for, or at least in-depth knowledge of, the use and application of customer analytics in the company.

- Average interview length was approximately 12 minutes.

- The project was conducted in strict accordance with the MRS Code of Conduct.

Brazil

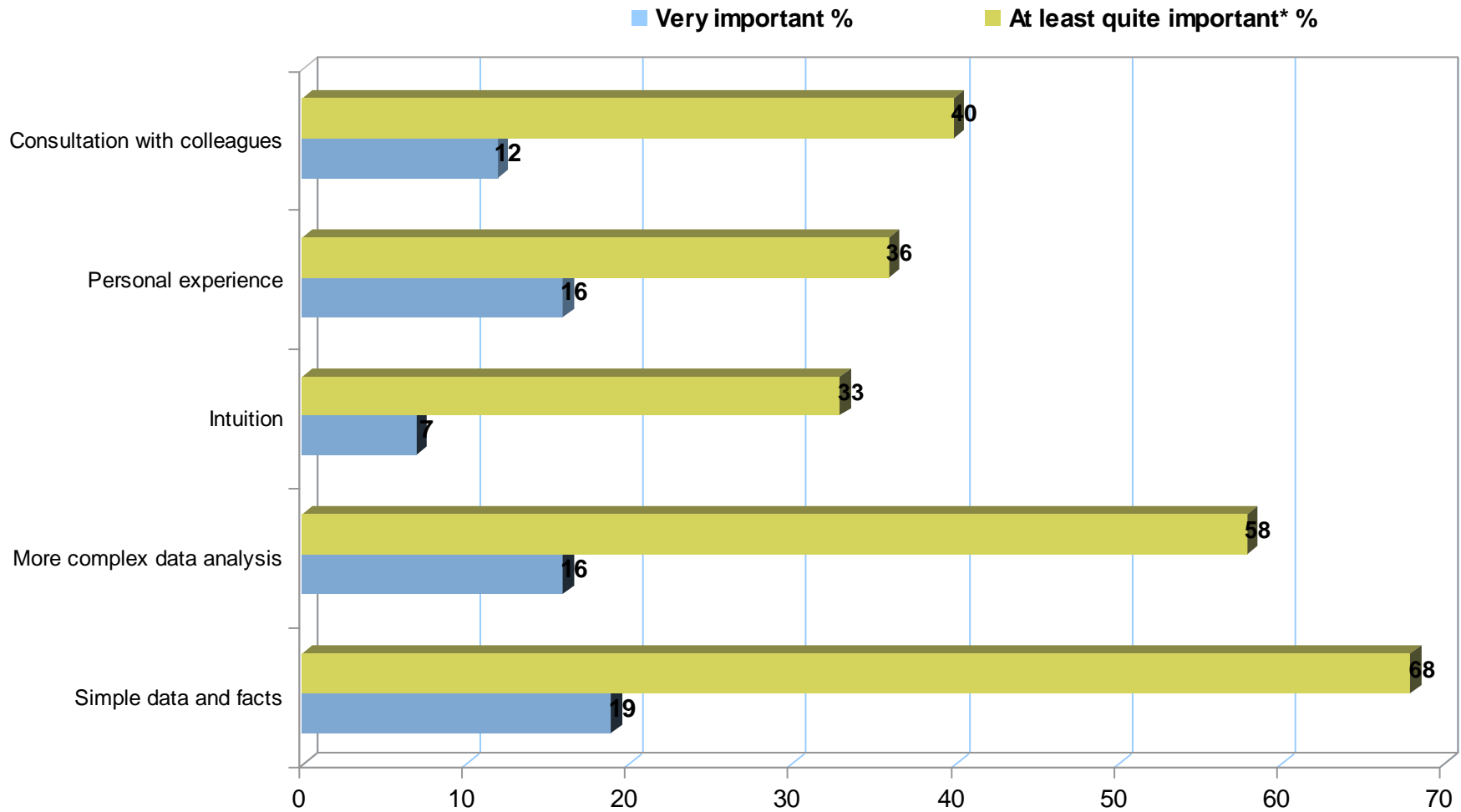# Extent to which companies are taking advantage of analytics to target, service or interact with customers

■ Yes %

Category	Value
New product/service development	28
Product/service delivery	15
Product/service pricing	11
Customer service	42
Marketing	57
Sales	47

0   10   20   30   40   50   60   70

Areas in which companies would benefit, and by how much, from a greater or more sophisticated use of analytics

Legend: ■ Would benefit greatly (1) % ■ Would benefit somewhat (2) % ■ Would benefit at all (1+2) %

Area	Would benefit greatly (1) %	Would benefit somewhat (2) %	Would benefit at all (1+2) %
Market profile/company image	17	29	46
Competitive position	18	24	42
New product/service development	13	29	42
Product/service delivery	8	22	30
Product/service pricing	8	21	29
Customer service	32	21	53
Marketing	17	35	52
Sales	22	38	60

Resources used by senior managers when making decisions about what their customers want

Legend:
- ■ Very important %
- ■ At least quite important* %

Resource	Very important %	At least quite important* %
Consultation with colleagues	12	40
Personal experience	16	36
Intuition	7	33
More complex data analysis	16	58
Simple data and facts	19	68

China

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

Yes %

Category	Value
New product/service development	21
Product/service delivery	12
Product/service pricing	17
Customer service	42
Marketing	51
Sales	38

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics
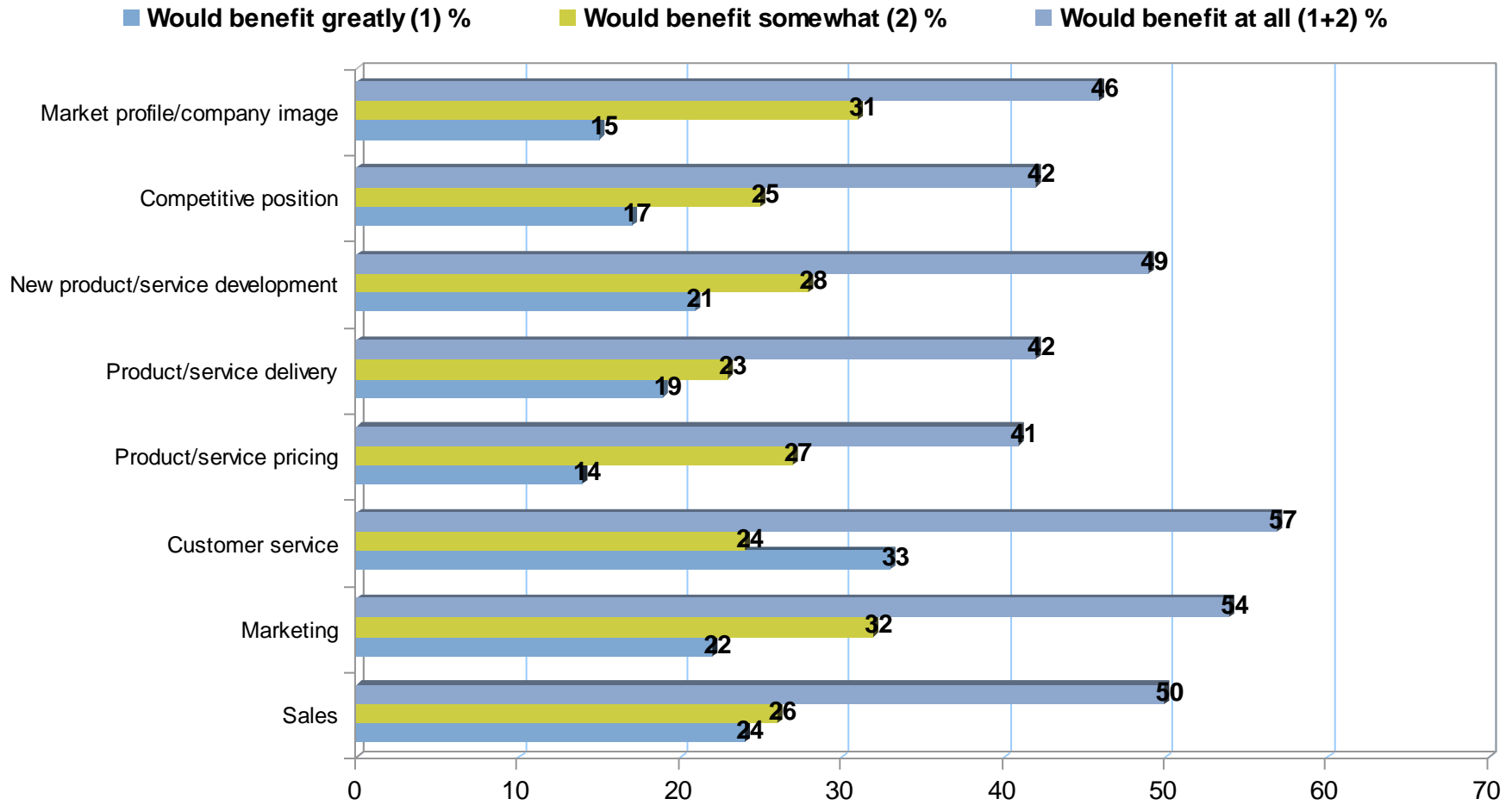
■ **Would benefit greatly (1) %**   ■ **Would benefit somewhat (2) %**   ■ **Would benefit at all (1+2) %**

Area	Would benefit greatly (1) %	Would benefit somewhat (2) %	Would benefit at all (1+2) %
Market profile/company image	15	31	46
Competitive position	17	25	42
New product/service development	21	28	49
Product/service delivery	19	23	42
Product/service pricing	14	27	41
Customer service	33	24	57
Marketing	22	32	54
Sales	24	26	50

Resources used by senior managers when making decisions about what their customers want

Legend: ■ Very important %　■ At least quite important* %

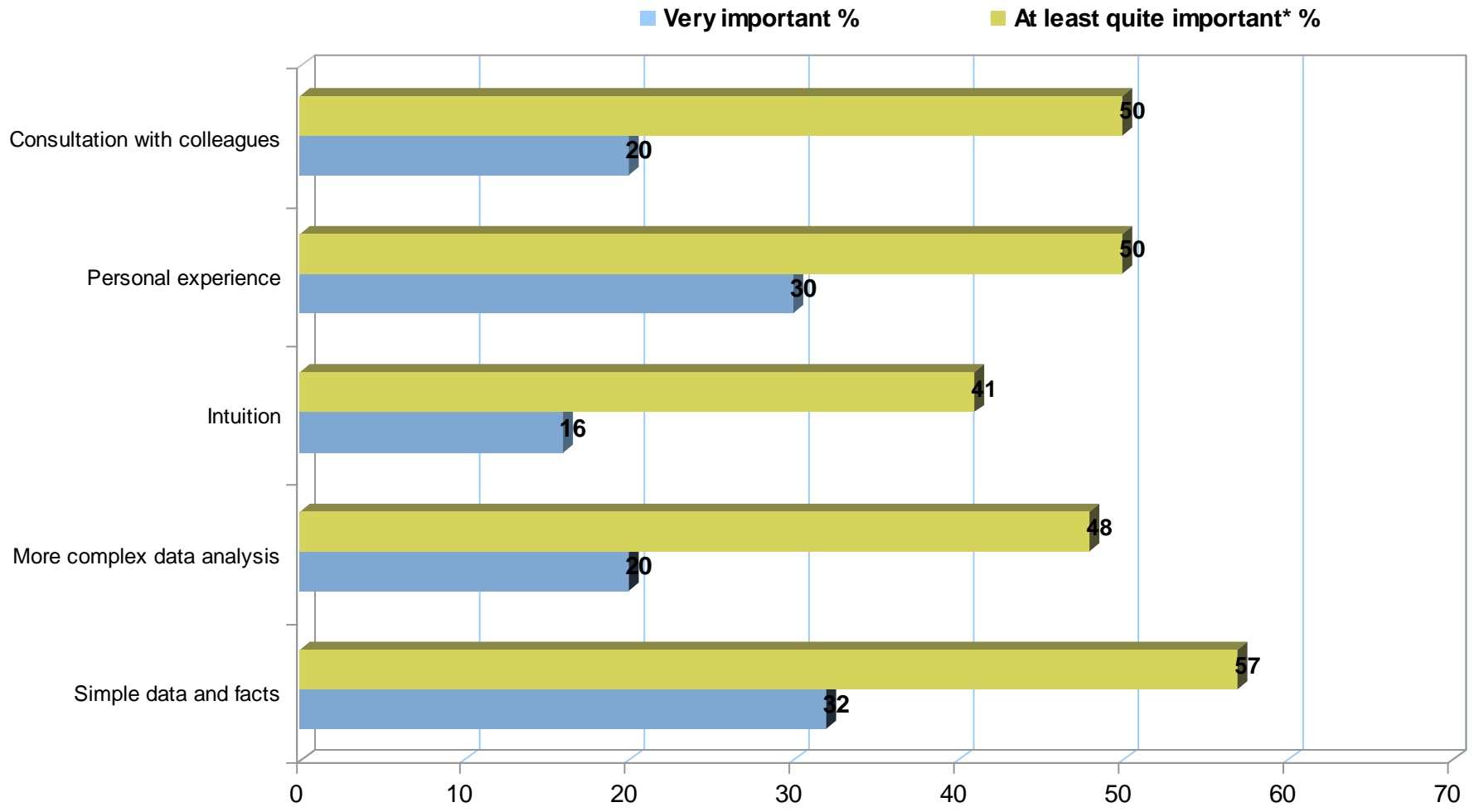| Resource	Very important %	At least quite important* %
Consultation with colleagues	20	50
Personal experience	30	50
Intuition	16	41
More complex data analysis	20	48
Simple data and facts	32	57

Germany

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

■ Yes %

Category	Value
New product/service development	40
Product/service delivery	33
Product/service pricing	27
Customer service	41
Marketing	53
Sales	44

0   10   20   30   40   50   60   70

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

Legend:
- ■ Would benefit greatly (1) %
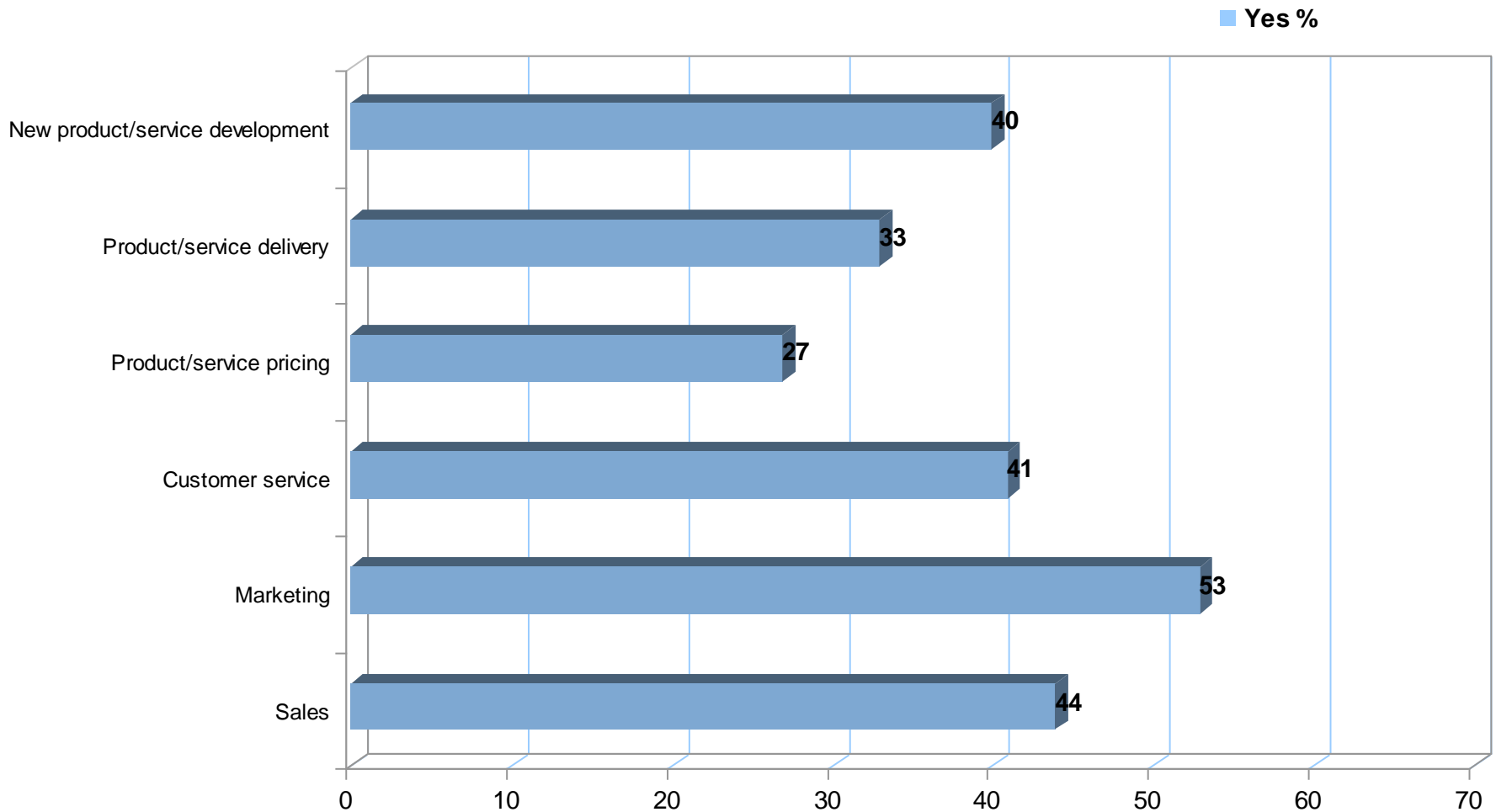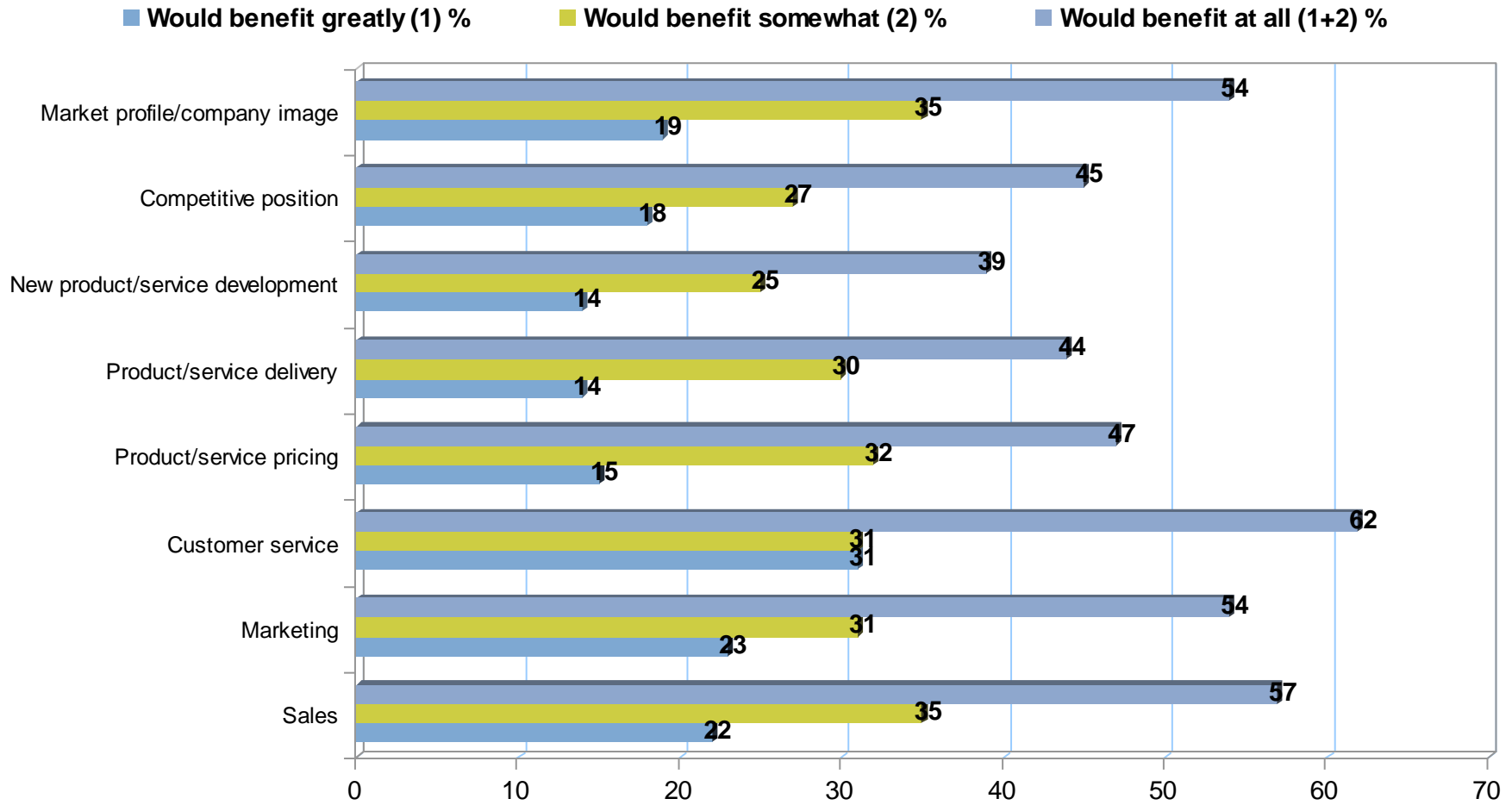- ■ Would benefit somewhat (2) %
- ■ Would benefit at all (1+2) %

Area	Would benefit at all (1+2) %	Would benefit somewhat (2) %	Would benefit greatly (1) %
Market profile/company image	54	35	19
Competitive position	45	27	18
New product/service development	39	25	14
Product/service delivery	44	30	14
Product/service pricing	47	32	15
Customer service	62	31	31
Marketing	54	31	23
Sales	57	35	22

Resources used by senior managers when making decisions about what their customers want

Legend: ■ Very important %   ■ At least quite important* %

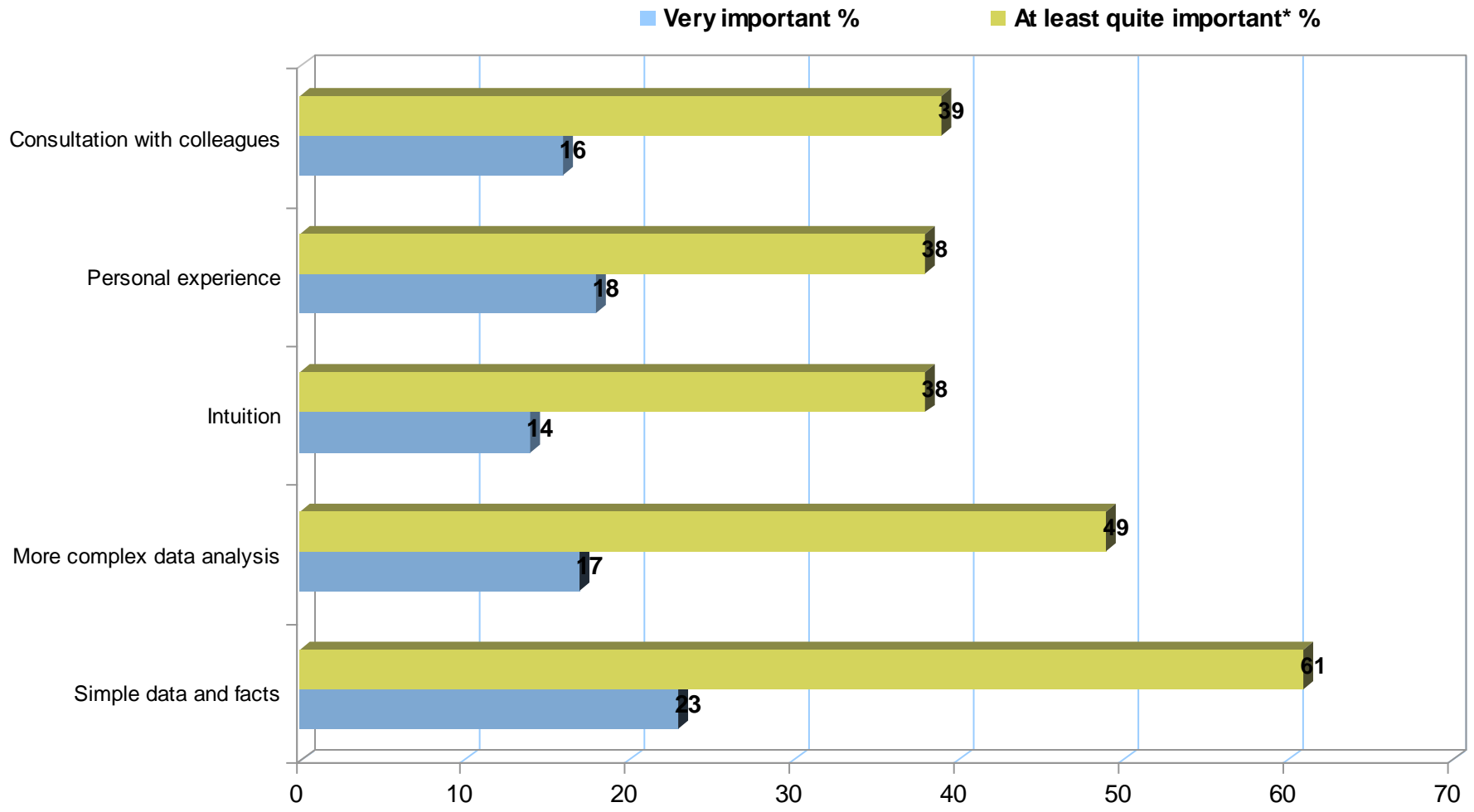| Resource	Very important %	At least quite important* %
Consultation with colleagues	16	39
Personal experience	18	38
Intuition	14	38
More complex data analysis	17	49
Simple data and facts	23	61

Italy

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

■ Yes %

Category	Value
New product/service development	20
Product/service delivery	22
Product/service pricing	20
Customer service	48
Marketing	42
Sales	42

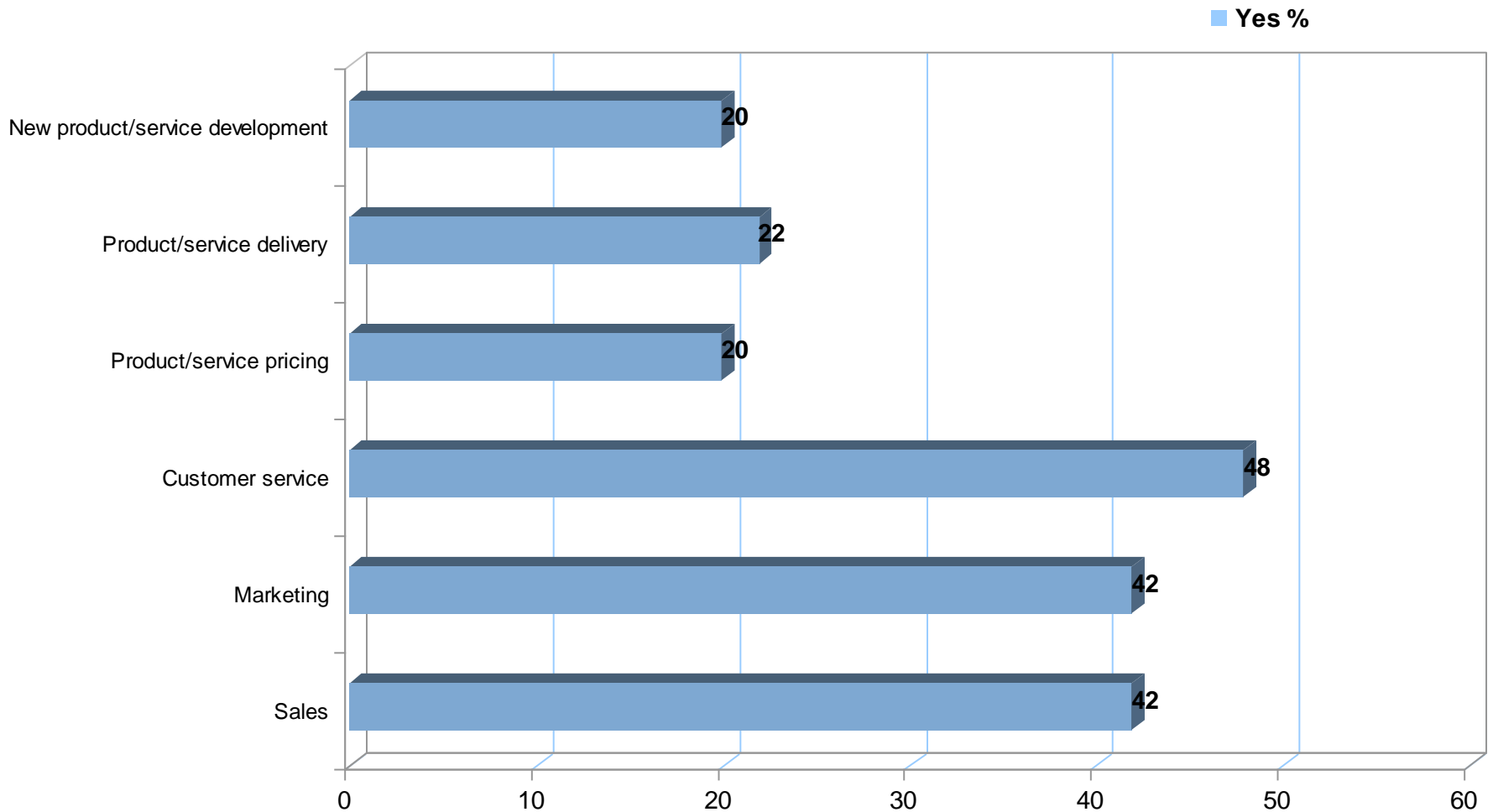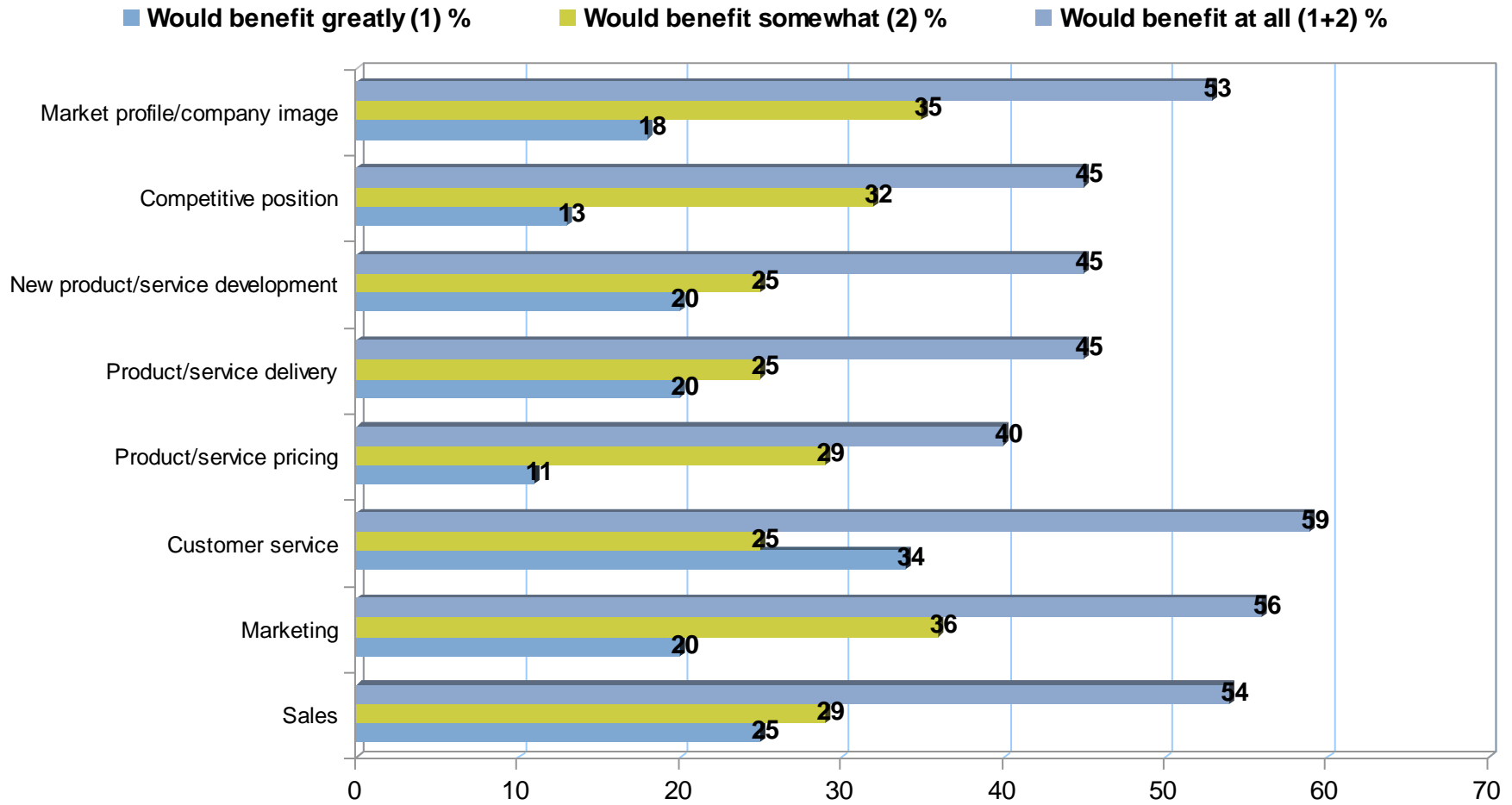# Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

Legend:
- ■ Would benefit greatly (1) %
- ■ Would benefit somewhat (2) %
- ■ Would benefit at all (1+2) %

Area	Would benefit at all (1+2) %	Would benefit somewhat (2) %	Would benefit greatly (1) %
Market profile/company image	53	35	18
Competitive position	45	32	13
New product/service development	45	25	20
Product/service delivery	45	25	20
Product/service pricing	40	29	11
Customer service	59	25	34
Marketing	56	36	20
Sales	54	29	25

Resources used by senior managers when making decisions about what their customers want

Legend: ■ Very important %   ■ At least quite important* %

Resource	Very important %	At least quite important* %
Consultation with colleagues	13	43
Personal experience	20	39
Intuition	12	36
More complex data analysis	13	37
Simple data and facts	20	46

Japan

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

■ Yes %

Category	Value
New product/service development	22
Product/service delivery	15
Product/service pricing	24
Customer service	47
Marketing	44
Sales	38

0   10   20   30   40   50   60

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

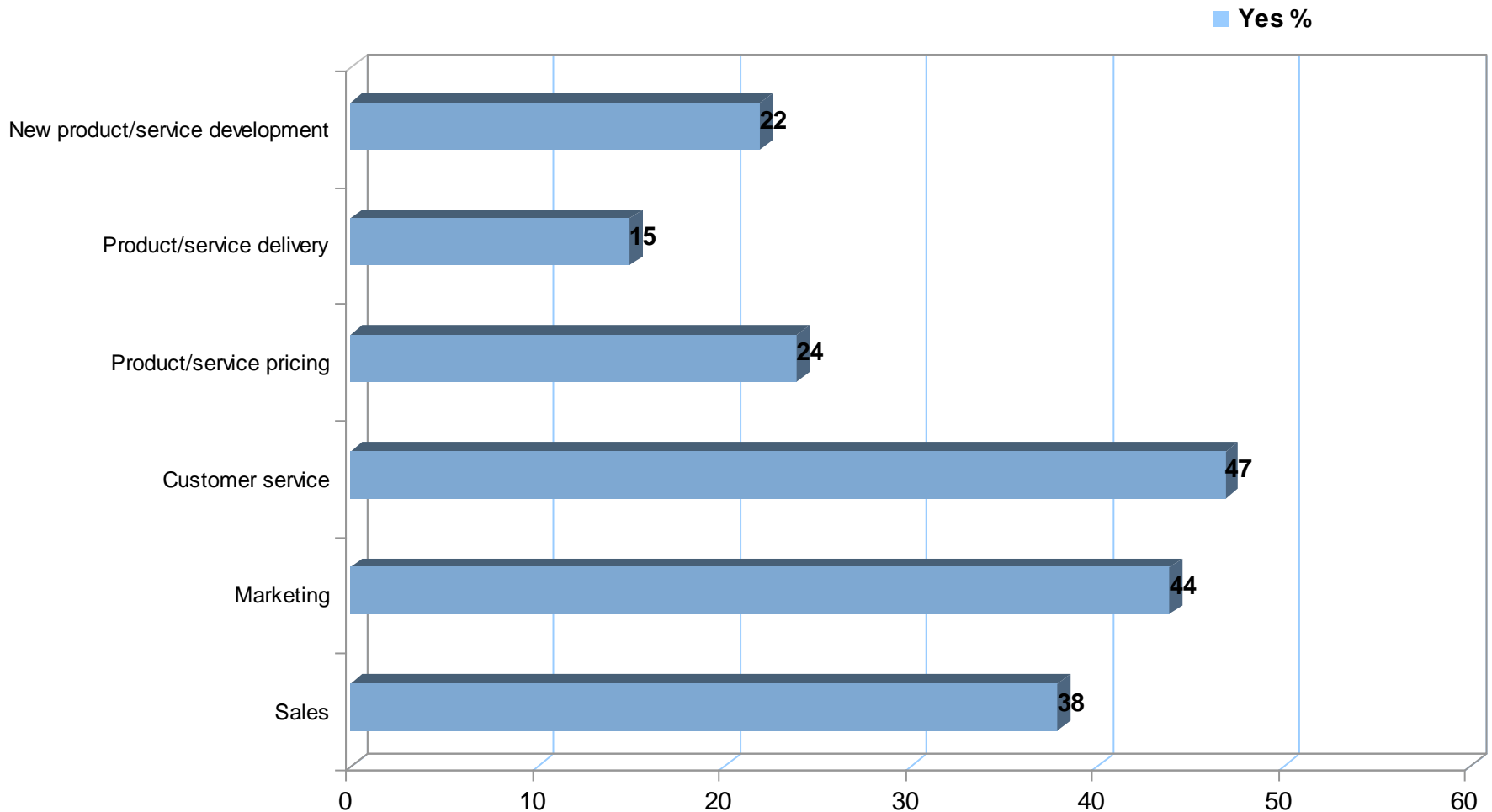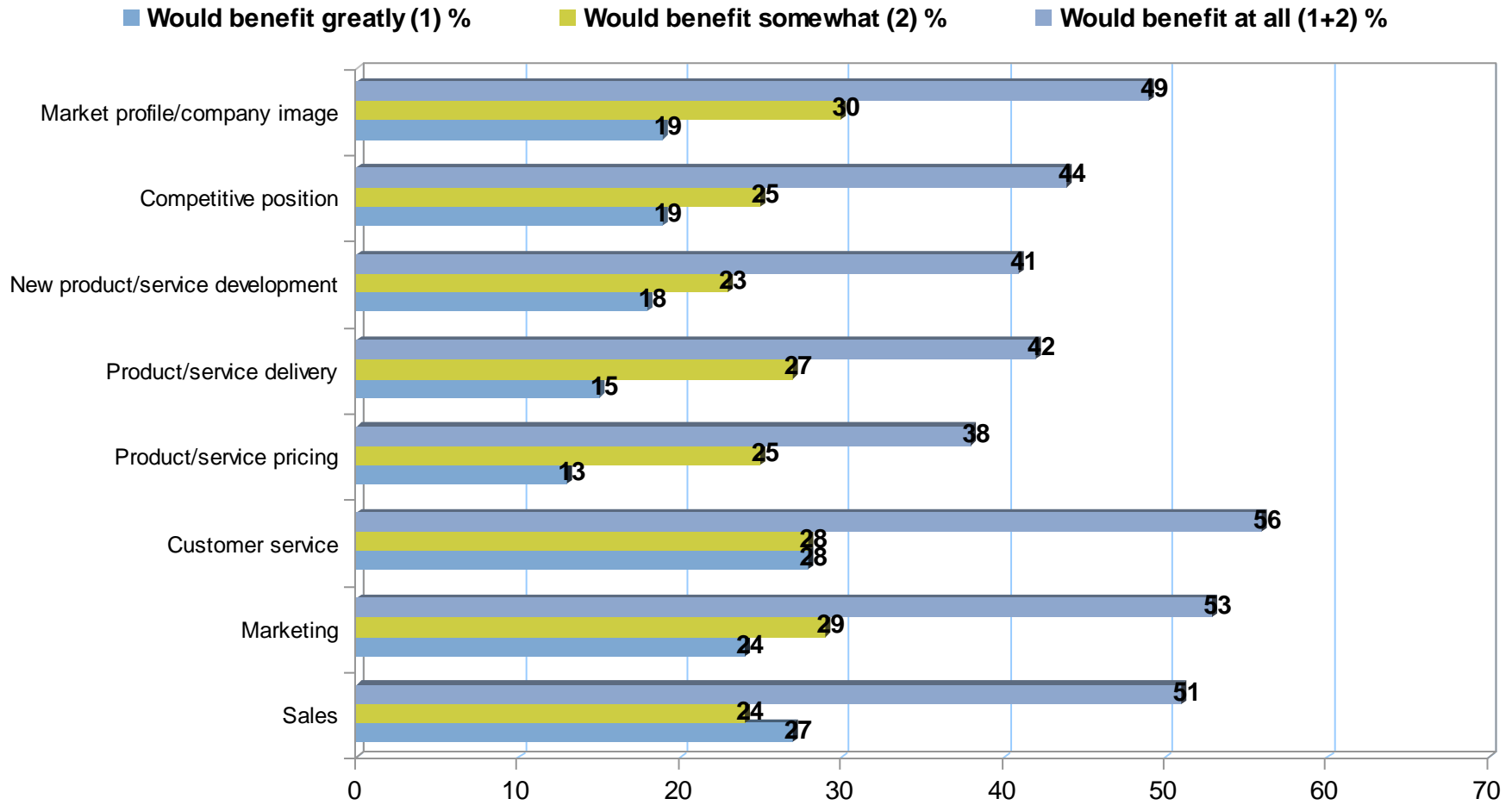■ **Would benefit greatly (1) %**　　■ **Would benefit somewhat (2) %**　　■ **Would benefit at all (1+2) %**

Area	Would benefit greatly (1) %	Would benefit somewhat (2) %	Would benefit at all (1+2) %
Market profile/company image	19	30	49
Competitive position	19	25	44
New product/service development	18	23	41
Product/service delivery	15	27	42
Product/service pricing	13	25	38
Customer service	28	28	56
Marketing	24	29	53
Sales	27	24	51

Resources used by senior managers when making decisions about what their customers want

Legend:
- Very important %
- At least quite important* %

Resource	Very important %	At least quite important* %
Consultation with colleagues	22	47
Personal experience	26	53
Intuition	19	48
More complex data analysis	19	48
Simple data and facts	20	48

Spain

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

■ **Yes %**

Category	Value
New product/service development	25
Product/service delivery	17
Product/service pricing	18
Customer service	41
Marketing	41
Sales	53

0   10   20   30   40   50   60   70

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

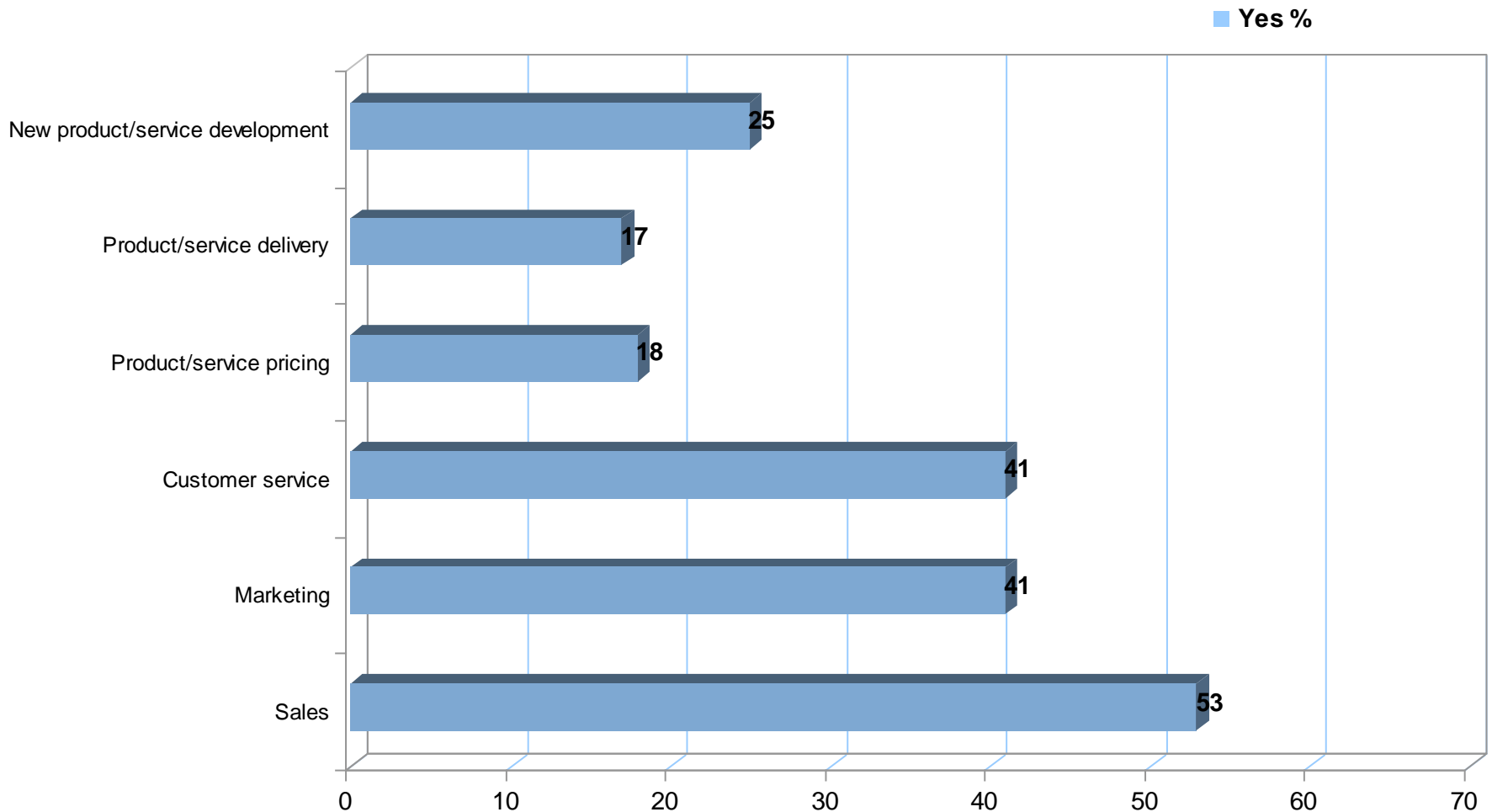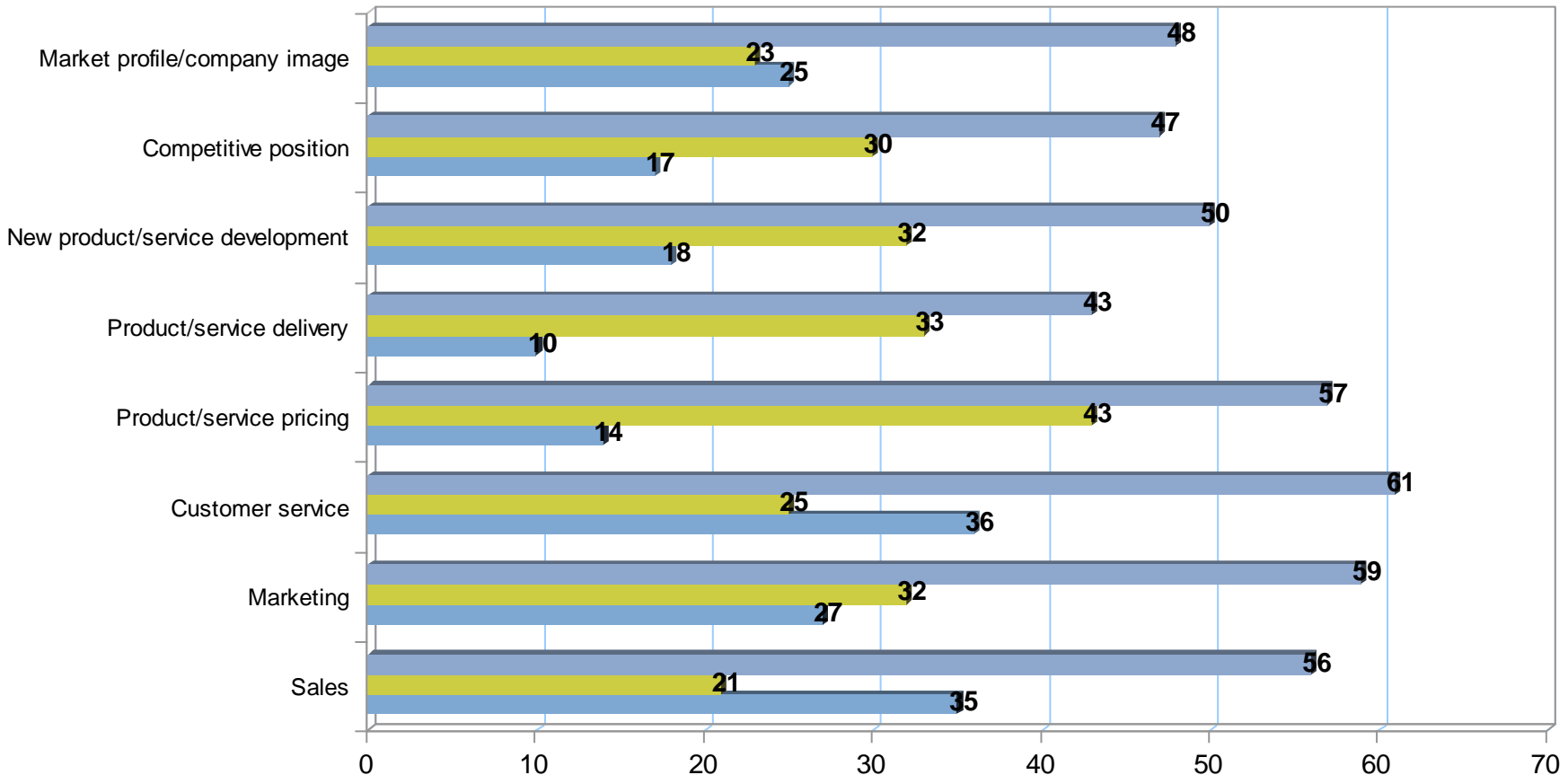■ Would benefit greatly (1) % ■ Would benefit somewhat (2) % ■ Would benefit at all (1+2) %

Area	Benefit at all (1+2)	Benefit somewhat (2)	Benefit greatly (1)
Market profile/company image	48	23	25
Competitive position	47	30	17
New product/service development	50	32	18
Product/service delivery	43	33	10
Product/service pricing	57	43	14
Customer service	61	25	36
Marketing	59	32	27
Sales	56	21	35

Resources used by senior managers when making decisions about what their customers want

Legend: ■ Very important % ■ At least quite important* %

Resource	Very important %	At least quite important* %
Consultation with colleagues	12	43
Personal experience	27	57
Intuition	12	47
More complex data analysis	22	56
Simple data and facts	20	49

UK and Ireland

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

Legend: ■ Yes %
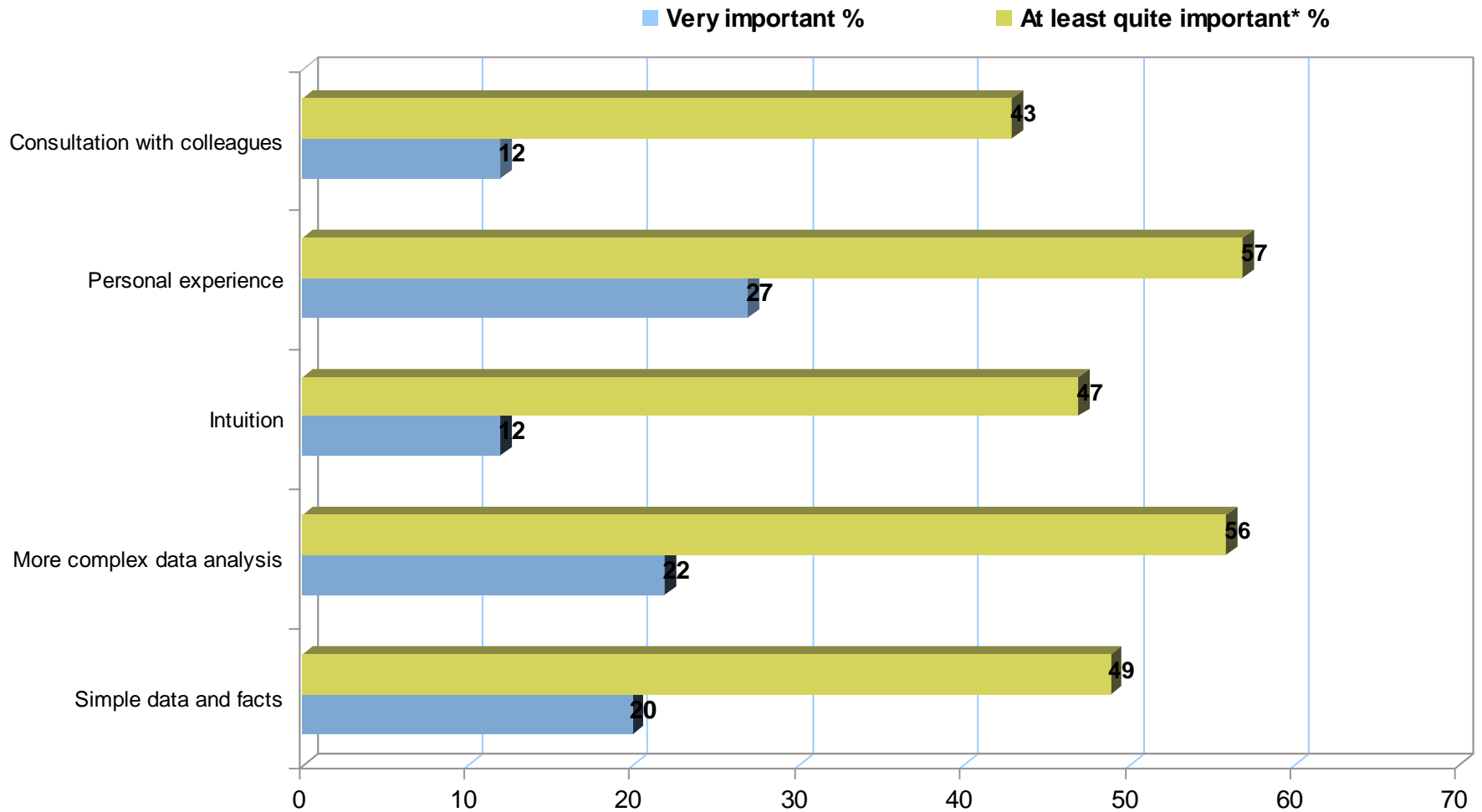
Category	Yes %
New product/service development	33
Product/service delivery	21
Product/service pricing	16
Customer service	36
Marketing	56
Sales	45

X-axis: 0, 10, 20, 30, 40, 50, 60, 70

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

Legend:
- Would benefit greatly (1) %
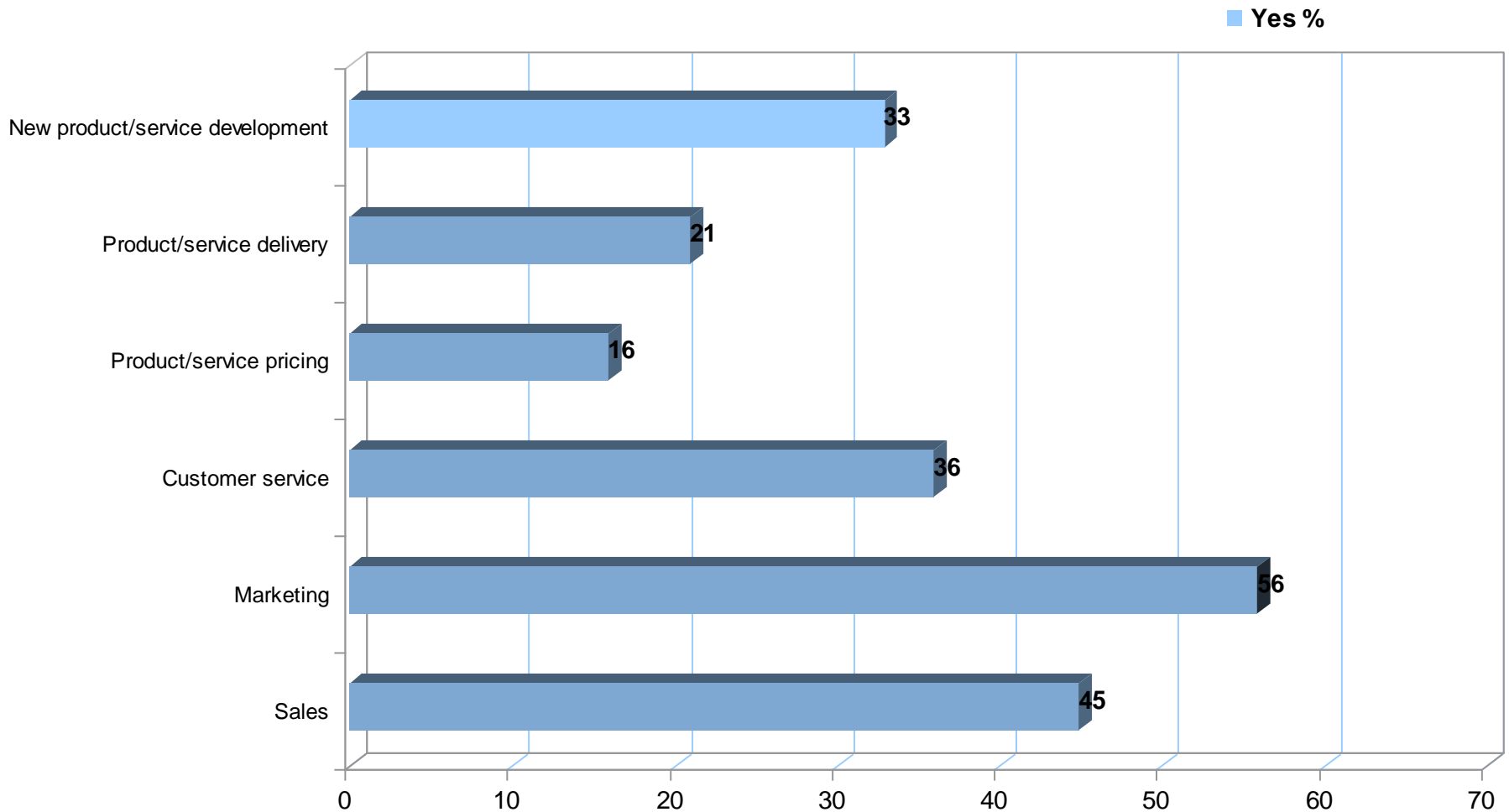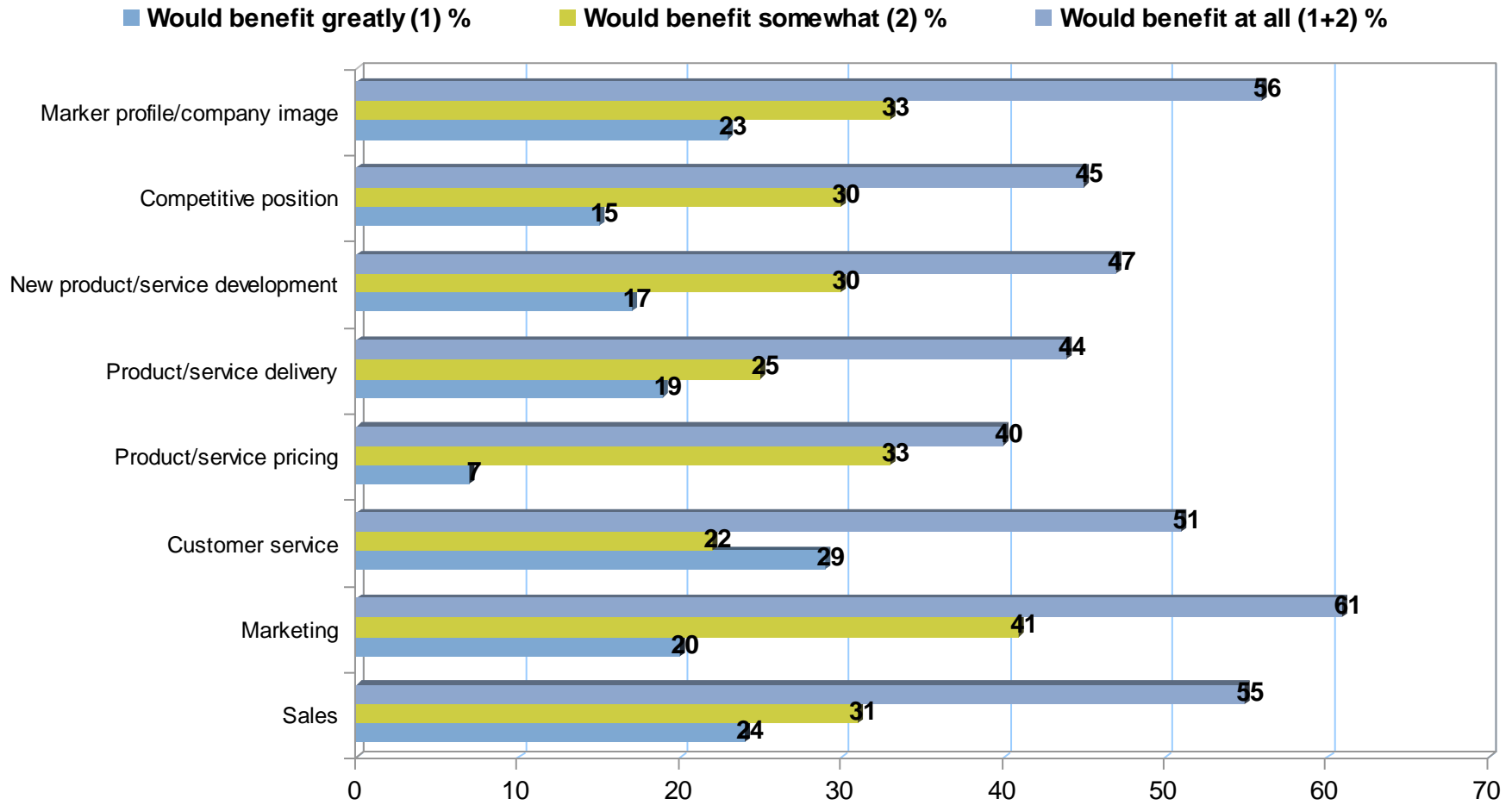- Would benefit somewhat (2) %
- Would benefit at all (1+2) %

Area	Would benefit greatly (1) %	Would benefit somewhat (2) %	Would benefit at all (1+2) %
Marker profile/company image	23	33	56
Competitive position	15	30	45
New product/service development	17	30	47
Product/service delivery	19	25	44
Product/service pricing	7	33	40
Customer service	29	22	51
Marketing	20	41	61
Sales	24	31	55

Resources used by senior managers when making decisions about what their customers want

Very important %   **At least quite important* %**

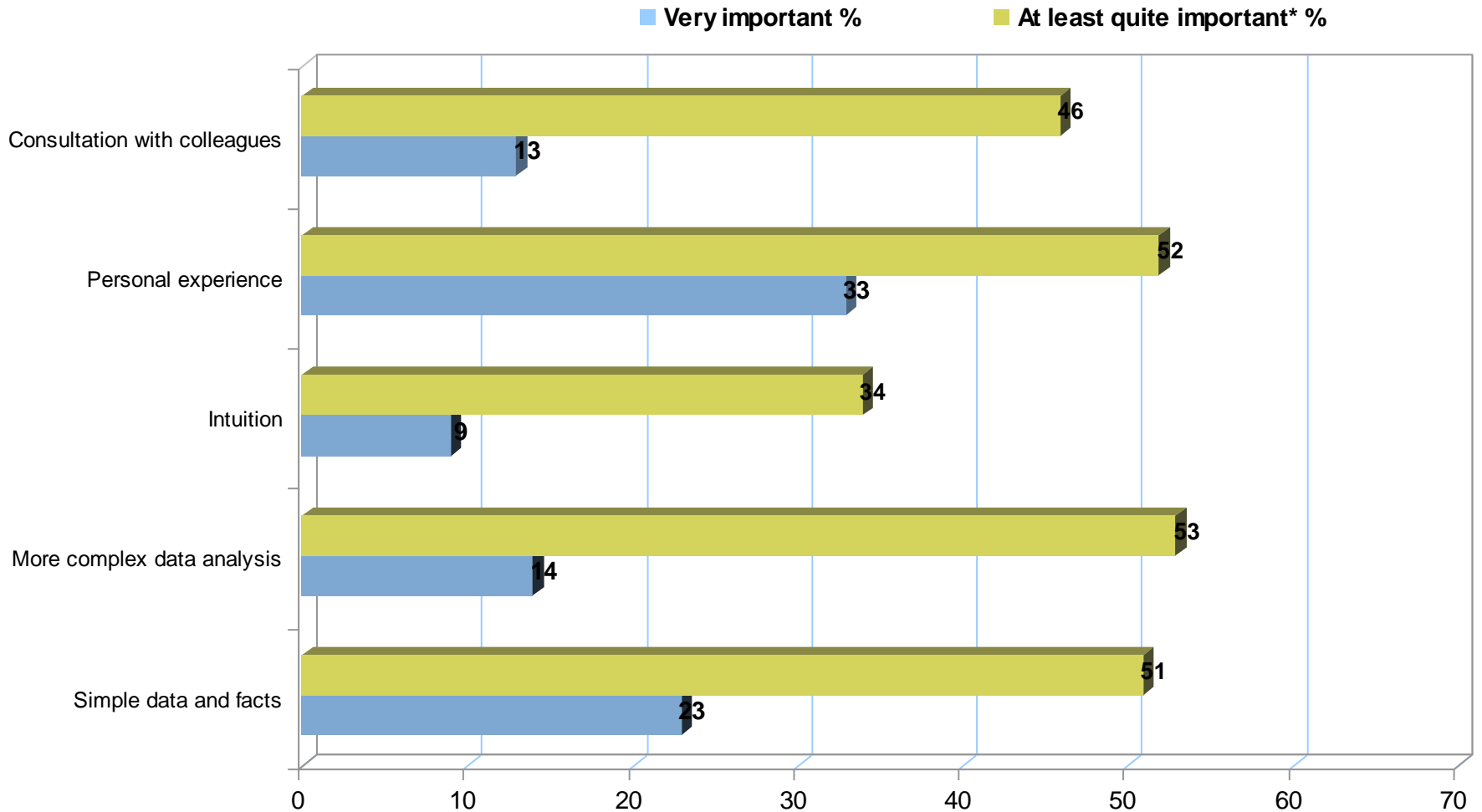| Resource	Very important %	At least quite important* %
Consultation with colleagues	13	46
Personal experience	33	52
Intuition	9	34
More complex data analysis	14	53
Simple data and facts	23	51

US and Canada

Extent to which organizations are taking advantage of analytics to target, service or interact with customers

■ Yes %

Category	Value
New product/service development	38
Product/service delivery	49
Product/service pricing	28
Customer service	57
Marketing	57
Sales	53

0   10   20   30   40   50   60   70

Areas in which organizations would benefit, and by how much, from a greater or more sophisticated use of analytics

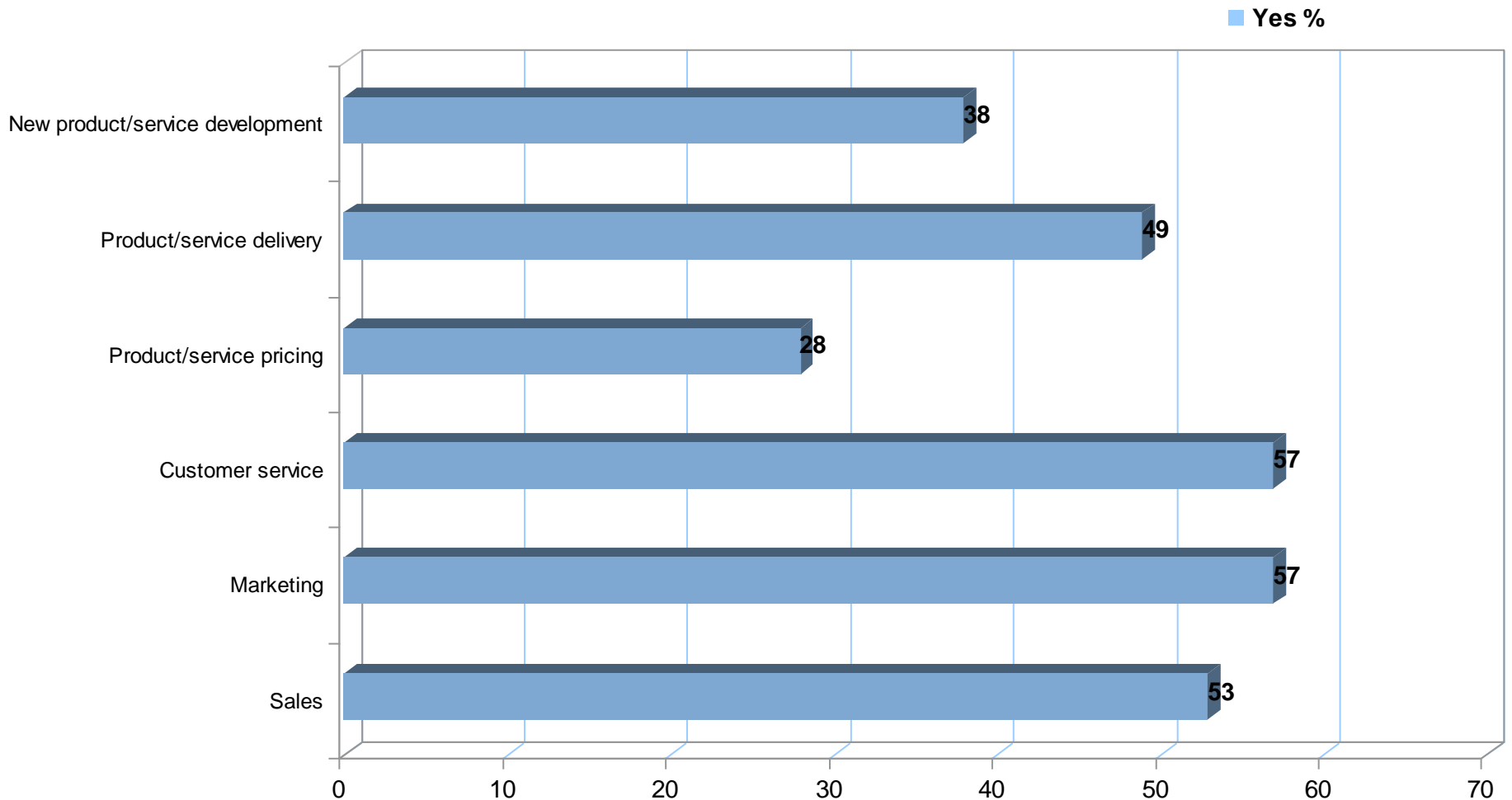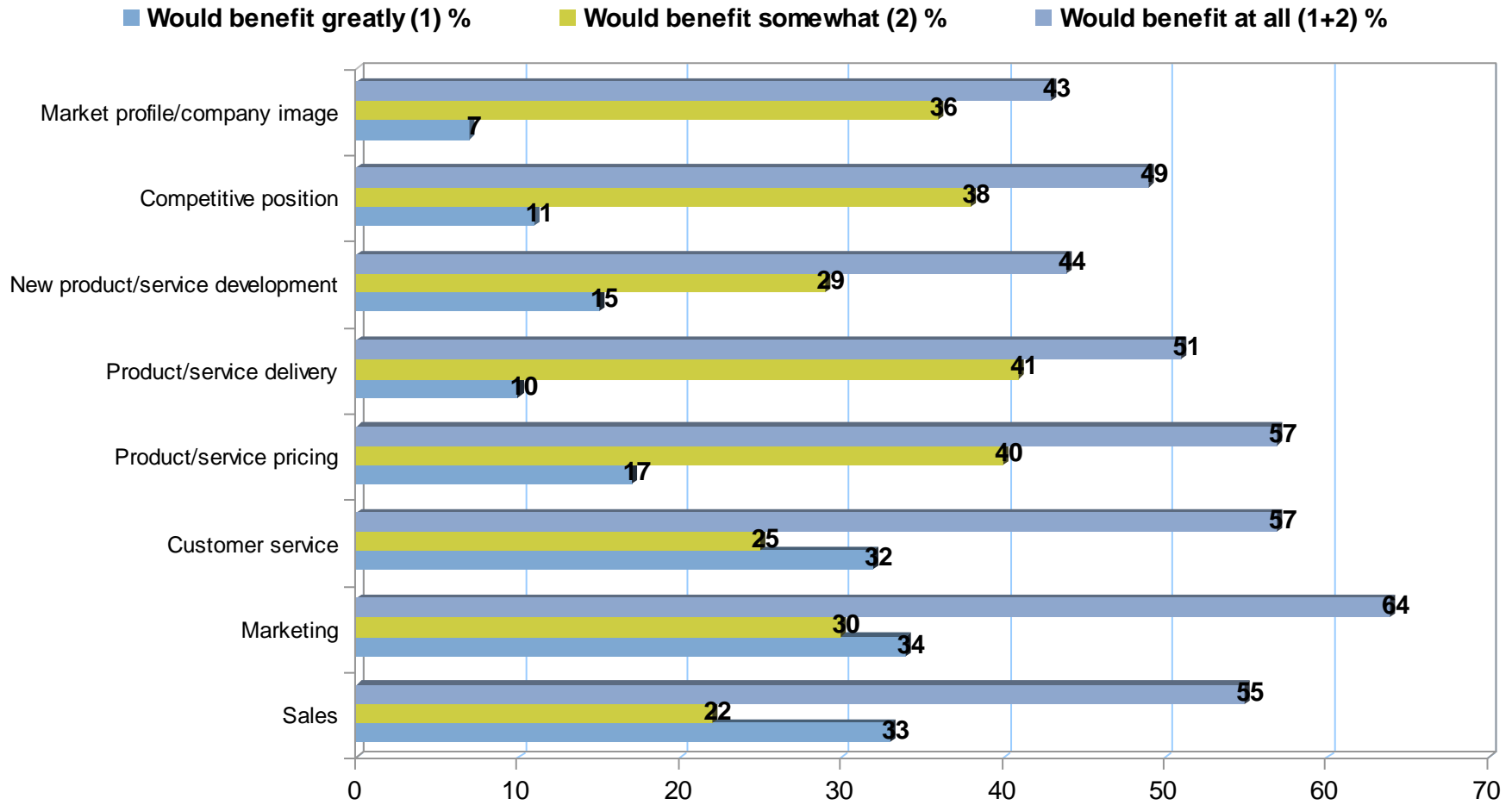■ Would benefit greatly (1) %   ■ Would benefit somewhat (2) %   ■ Would benefit at all (1+2) %

Area	Would benefit greatly (1) %	Would benefit somewhat (2) %	Would benefit at all (1+2) %
Market profile/company image	7	36	43
Competitive position	11	38	49
New product/service development	15	29	44
Product/service delivery	10	41	51
Product/service pricing	17	40	57
Customer service	32	25	57
Marketing	34	30	64
Sales	33	22	55

Resources used by senior managers when making decisions about what their customers want

Legend: Very important % · At least quite important* %

Resource	Very important %	At least quite important* %
Consultation with colleagues	11	34
Personal experience	13	40
Intuition	9	29
More complex data analysis	13	38
Simple data and facts	27	45

Additional questions broken down by country

Extent to which analytics has been beneficial in understanding…..
Customer activity by channel

Legend:
- Very benefical % (1)
- Quite benefical % (2)
- At least quite % (1+2)

Category	Very benefical % (1)	Quite benefical % (2)	At least quite % (1+2)
Total	32	36	69
US/Canada	21	42	63
UK/Ireland	36	31	67
Germany	35	35	70
Italy	26	33	59
Spain	28	40	68
Brazil	47	26	73
China	31	44	75
Japan	33	40	73
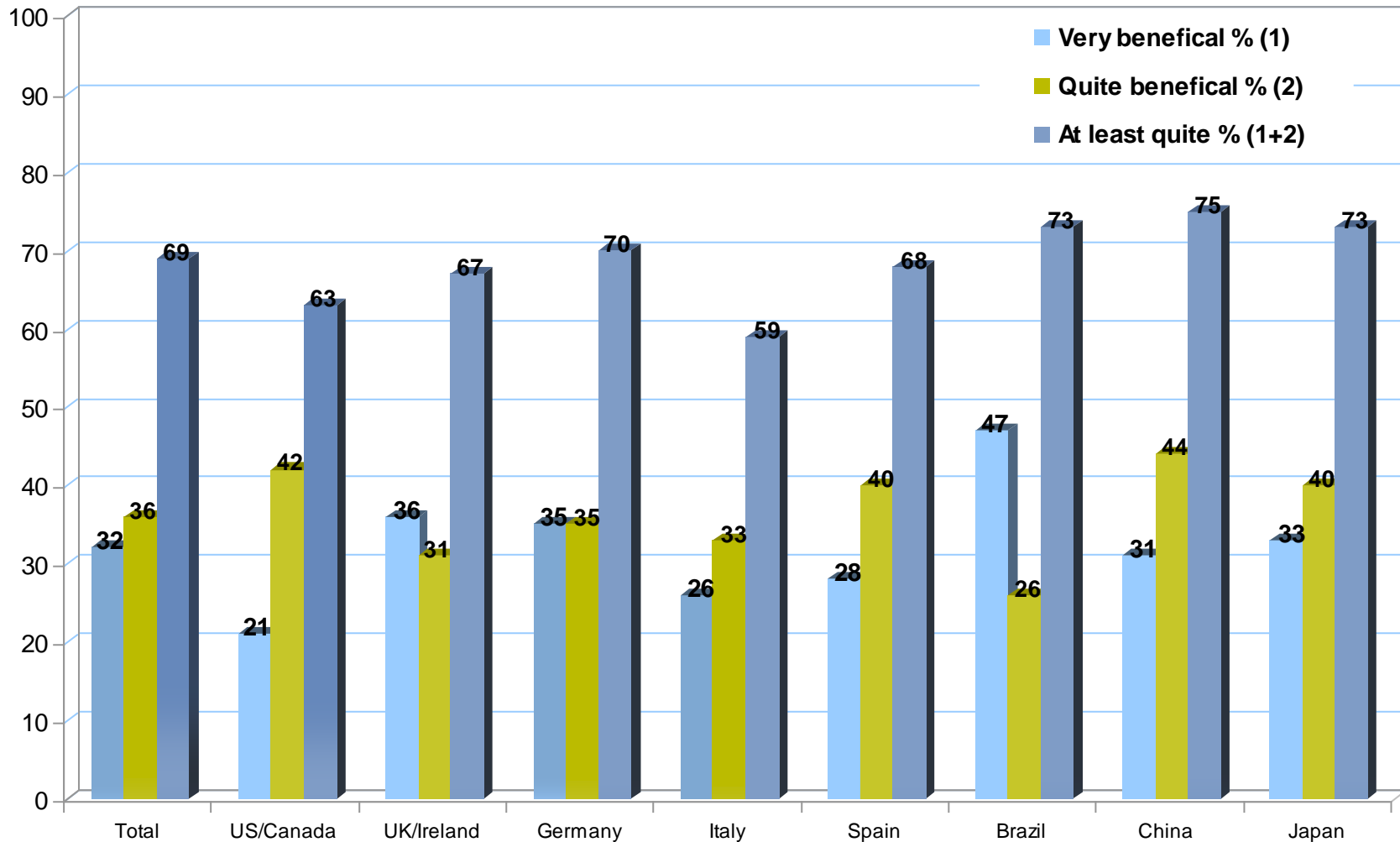
Extent to which analytics has been beneficial in understanding…..
Marketing campaign performance/ROI

Legend:
- Very benefical % (1)
- Quite benefical % (2)
- At least quite % (1+2)

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Very benefical % (1)	25	15	28	32	29	30	22	22	22
Quite benefical % (2)	43	50	41	35	35	35	50	50	47
At least quite % (1+2)	68	65	69	67	64	65	72	72	69
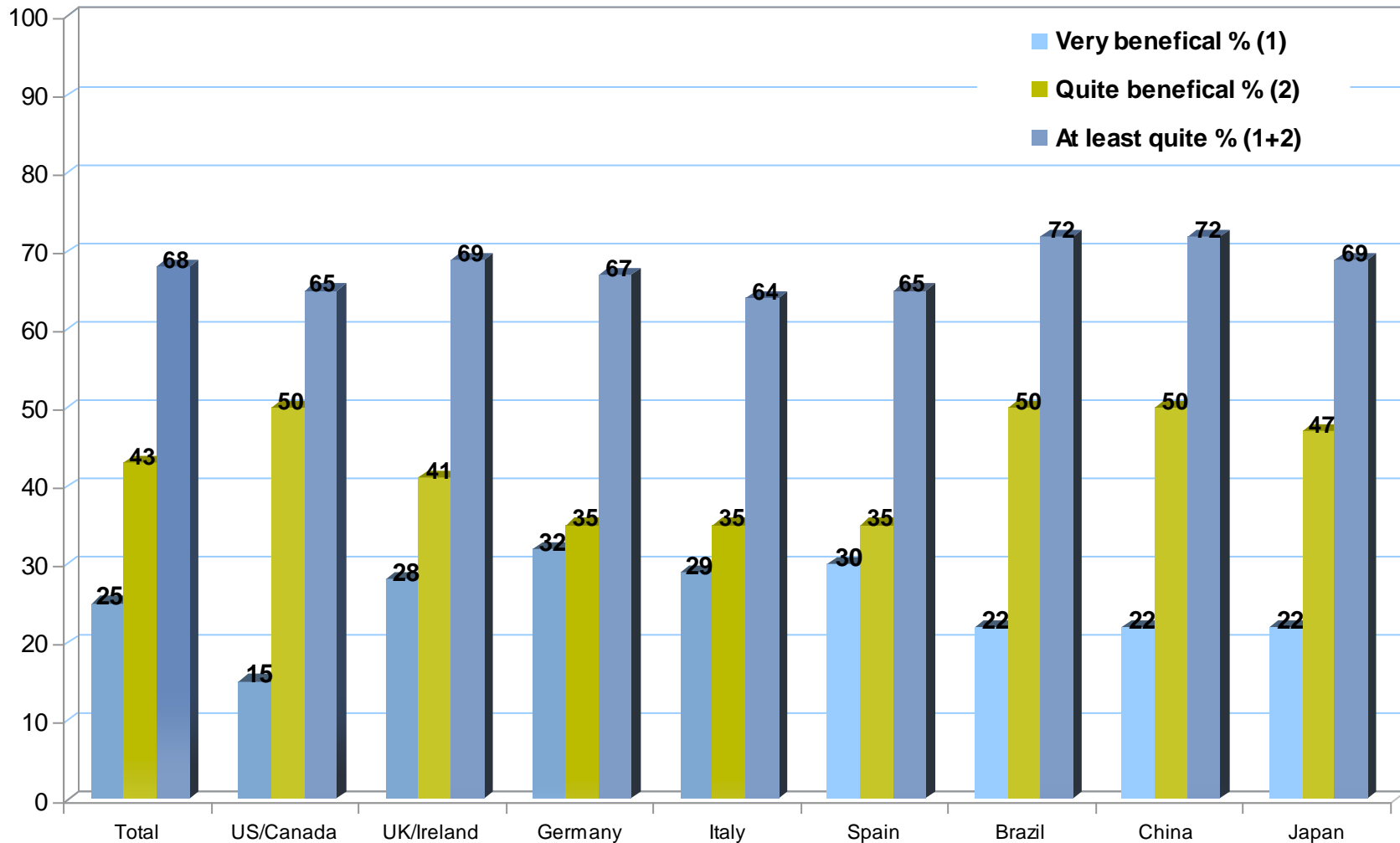
Extent to which analytics has been beneficial in understanding…..
Customer service performance

Legend:
- Very benefical % (1)
- Quite benefical % (2)
- At least quite % (1+2)

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Very benefical % (1)	29	23	32	29	28	26	31	35	31
Quite benefical % (2)	42	40	41	32	41	55	38	46	45
At least quite % (1+2)	72	63	73	61	69	81	69	81	76
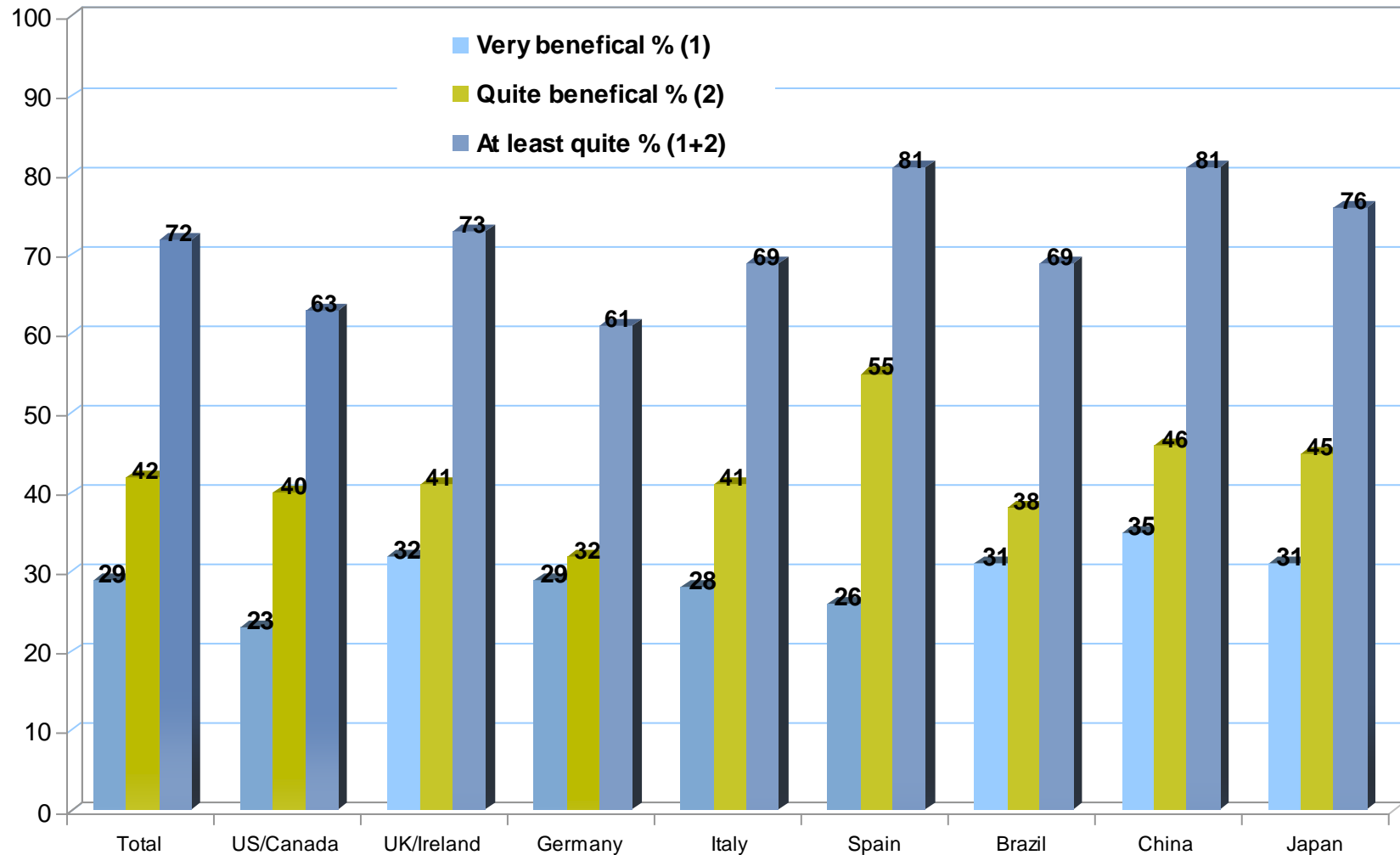
Extent to which analytics has been beneficial in understanding…..
Determining reasons for losing customers

Legend:
- Very benefical % (1)
- Quite benefical % (2)
- At least quite % (1+2)

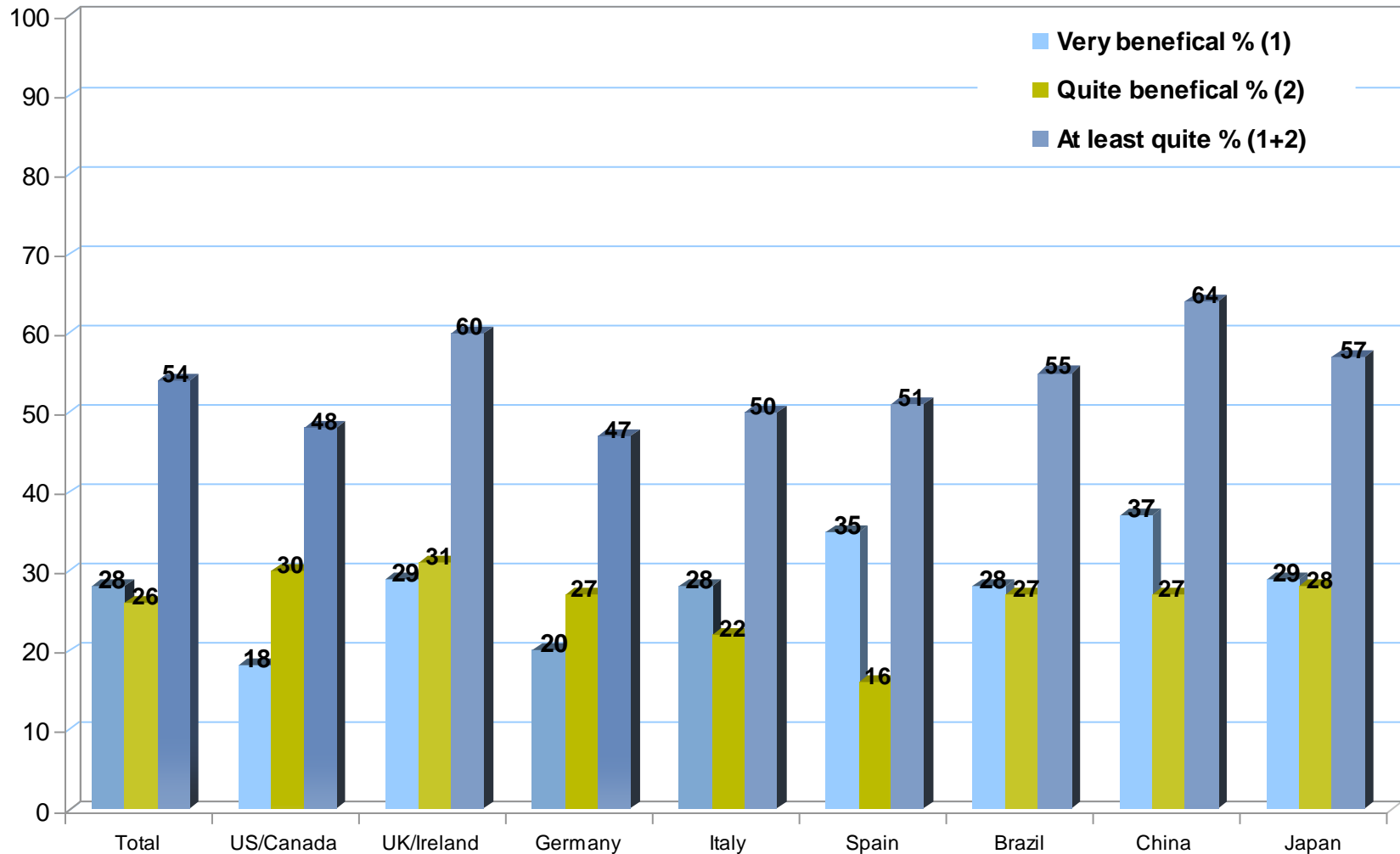| Region	Very benefical % (1)	Quite benefical % (2)	At least quite % (1+2)
Total	28	26	54
US/Canada	18	30	48
UK/Ireland	29	31	60
Germany	20	27	47
Italy	28	22	50
Spain	35	16	51
Brazil	28	27	55
China	37	27	64
Japan	29	28	57

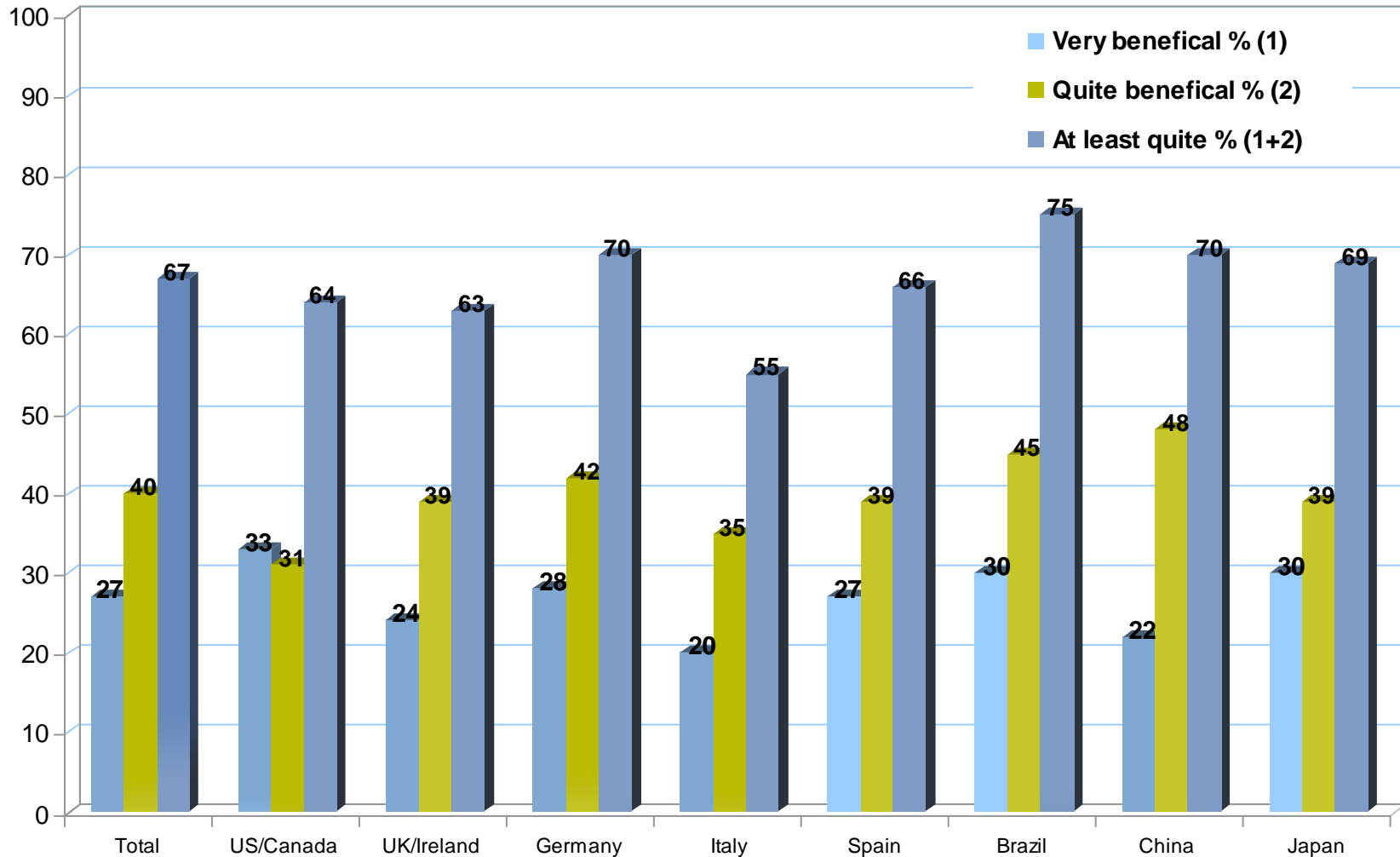# Extent to which analytics has been beneficial in understanding…..
Individual customer revenue
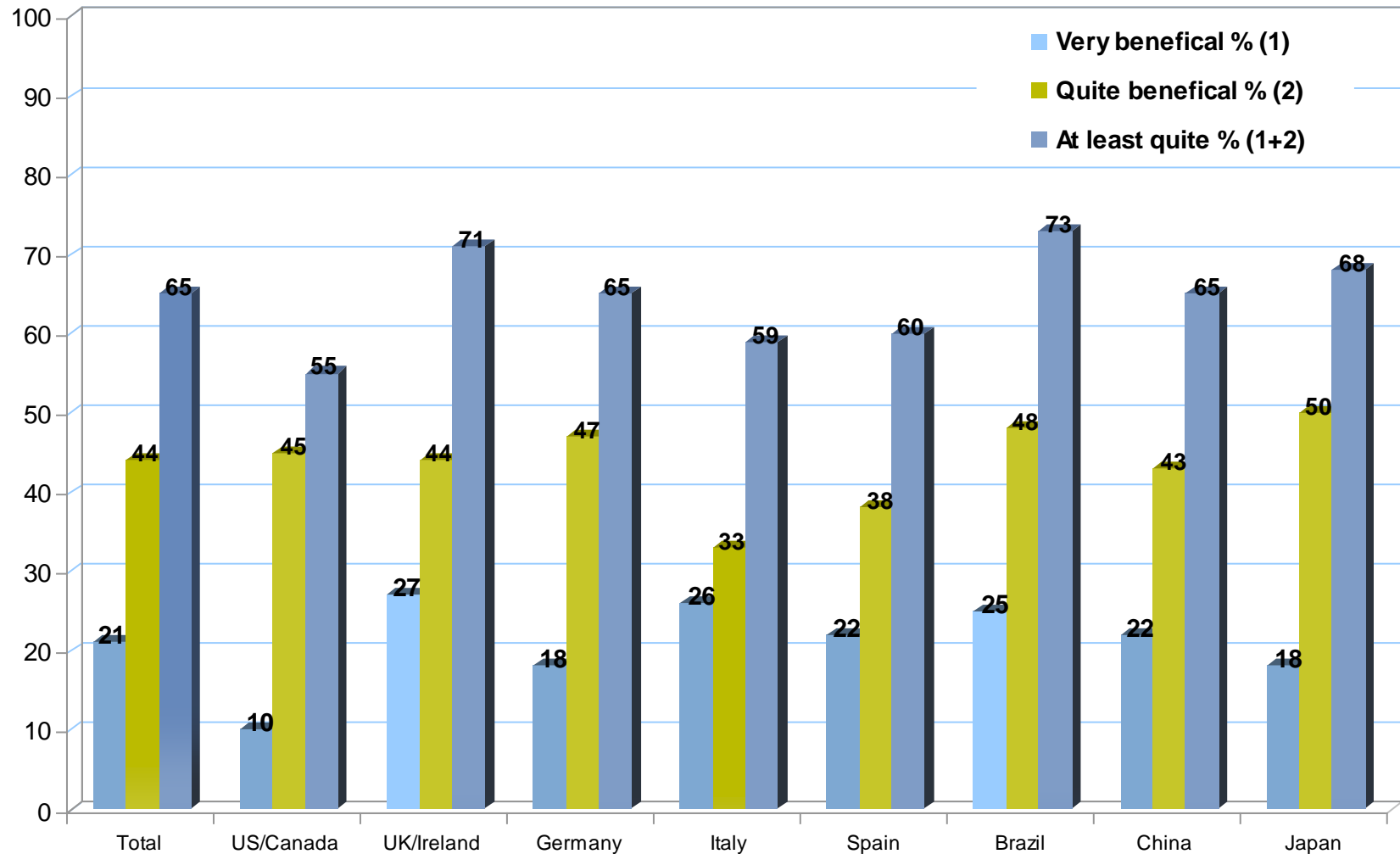
Extent to which analytics has been beneficial in understanding…..
Sales team management

Extent to which analytics has been beneficial in understanding…..
Speed of customer return

Legend:
- ■ Very benefical % (1)
- ■ Quite benefical % (2)
- ■ At least quite % (1+2)

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Very benefical % (1)	23	22	21	22	14	18	36	22	28
Quite benefical % (2)	42	40	34	45	47	48	33	50	42
At least quite % (1+2)	65	62	55	67	61	66	69	72	70
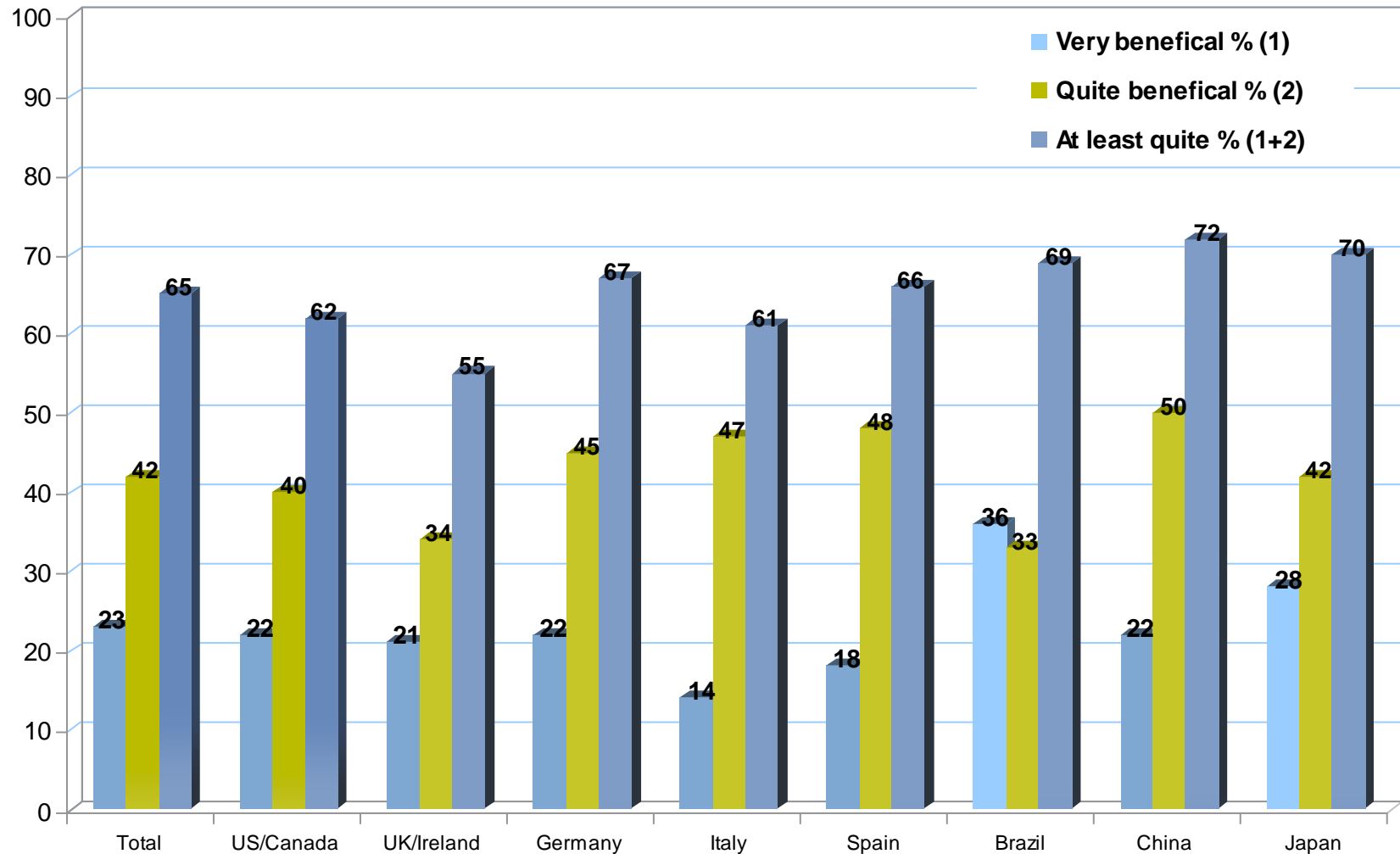
Extent to which analytics has been beneficial in understanding…..
Speed/level of customer activity

Legend:
- Very benefical % (1)
- Quite benefical % (2)
- At least quite % (1+2)

Country	Very benefical % (1)	Quite benefical % (2)	At least quite % (1+2)
Total	26	35	61
US/Canada	23	39	62
UK/Ireland	19	40	59
Germany	27	32	59
Italy	22	33	55
Spain	22	36	58
Brazil	40	30	70
China	27	38	65
Japan	26	34	60

Frequency of use of customer analytics in Sales

Legend:
- ■ Very frequently % (1)
- ■ Quite frequently % (2)
- ■ At least quite frequently % (1+2)

Country	Very frequently % (1)	Quite frequently % (2)	At least quite frequently % (1+2)
Total	23	30	53
US/Canada	14	37	53
UK/Ireland	32	32	64
Germany	19	35	54
Italy	26	25	51
Spain	24	27	51
Brazil	18	33	51
China	28	20	48
Japan	26	28	54

Frequency of use of customer analytics in Marketing

Legend: ■ Very frequently % (1) ■ Quite frequently % (2) ■ At least quite frequently % (1+2)

Country	Very frequently % (1)	Quite frequently % (2)	At least quite frequently % (1+2)
Total	23	36	59
US/Canada	12	40	52
UK/Ireland	29	43	72
Germany	18	38	56
Italy	23	37	60
Spain	27	36	63
Brazil	21	35	56
China	24	30	54
Japan	26	32	58
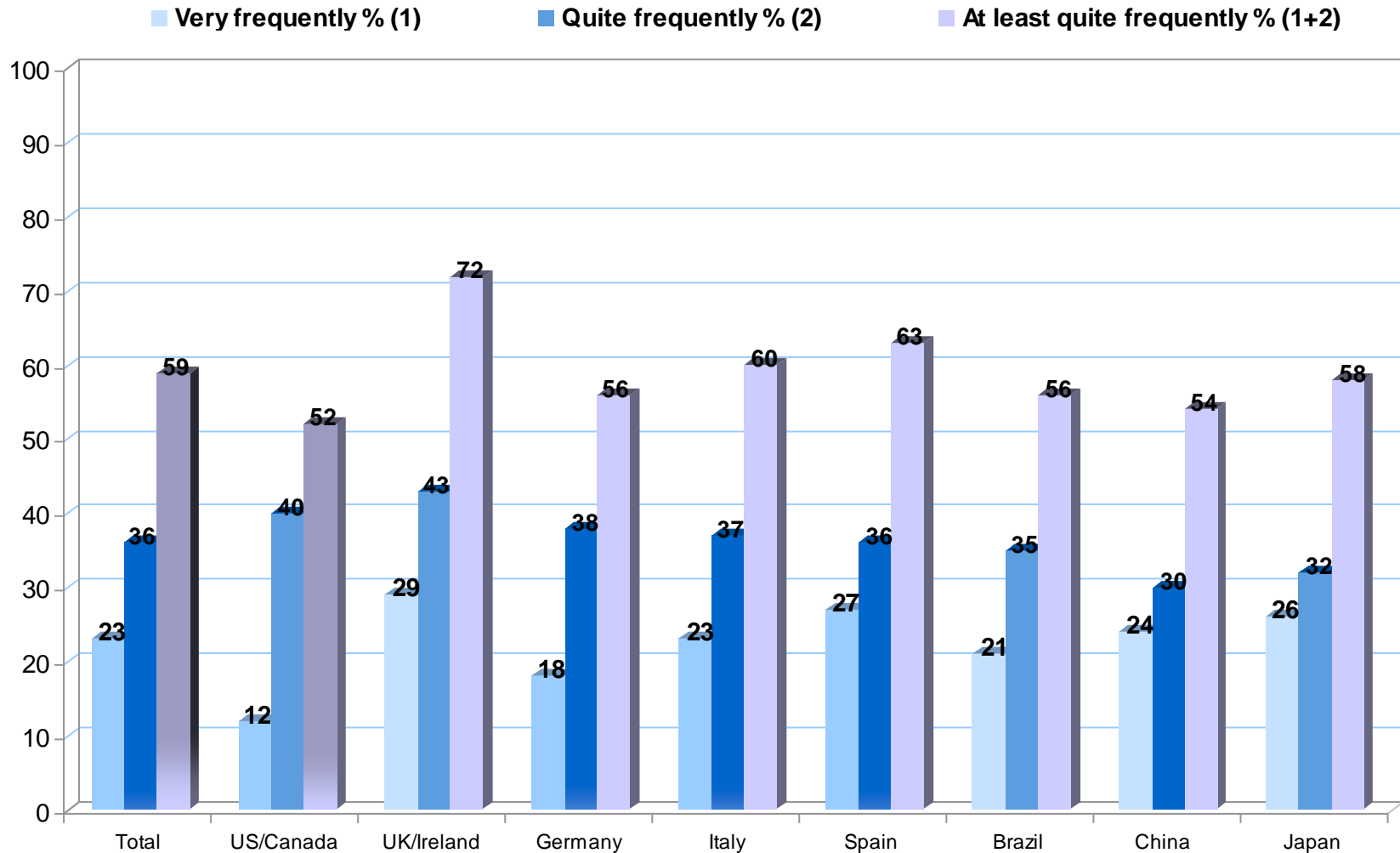
Frequency of use of customer analytics in Customer Service

■ Very frequently % (1)   ■ Quite frequently % (2)   ■ At least quite frequently % (1+2)

	Very frequently % (1)	Quite frequently % (2)	At least quite frequently % (1+2)
Total	21	33	54
US/Canada	6	27	33
UK/Ireland	29	27	56
Germany	15	31	46
Italy	22	32	54
Spain	17	41	58
Brazil	21	35	56
China	32	32	64
Japan	25	41	66
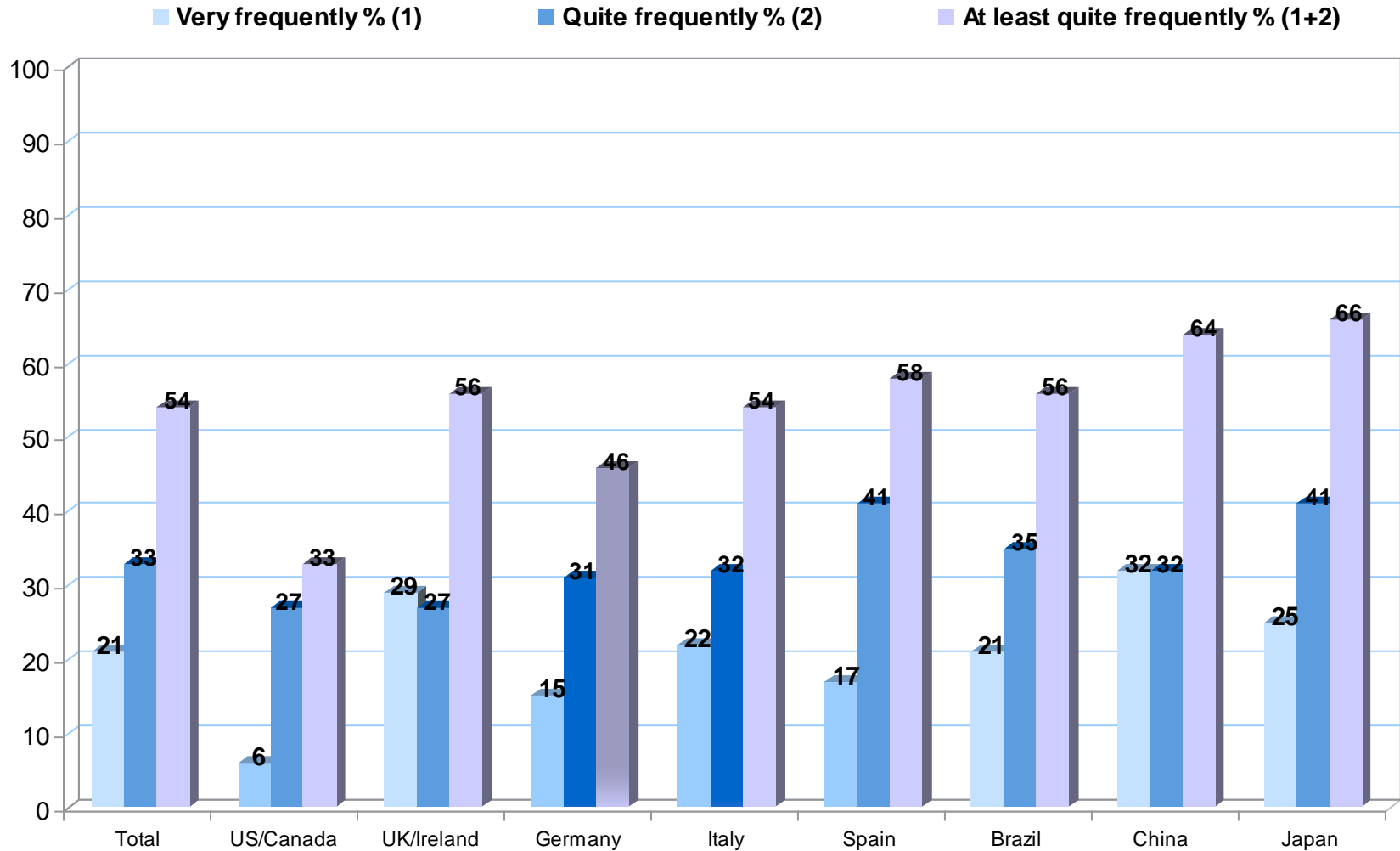
How well organizations claim to segment and manage different types of customers and prospects

Legend: Ideal or close to it % | Very good % | Quite good % | Preety poor % | Not very well at all %

Category	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Not very well at all %	1	0	0	0	1	0	2	1	0
Preety poor %	5	8	5	9	4	4	4	1	4
Quite good %	40	38	37	37	50	52	28	43	32
Very good %	45	42	54	41	41	37	46	46	54
Ideal or close to it %	10	12	4	13	4	7	20	9	10
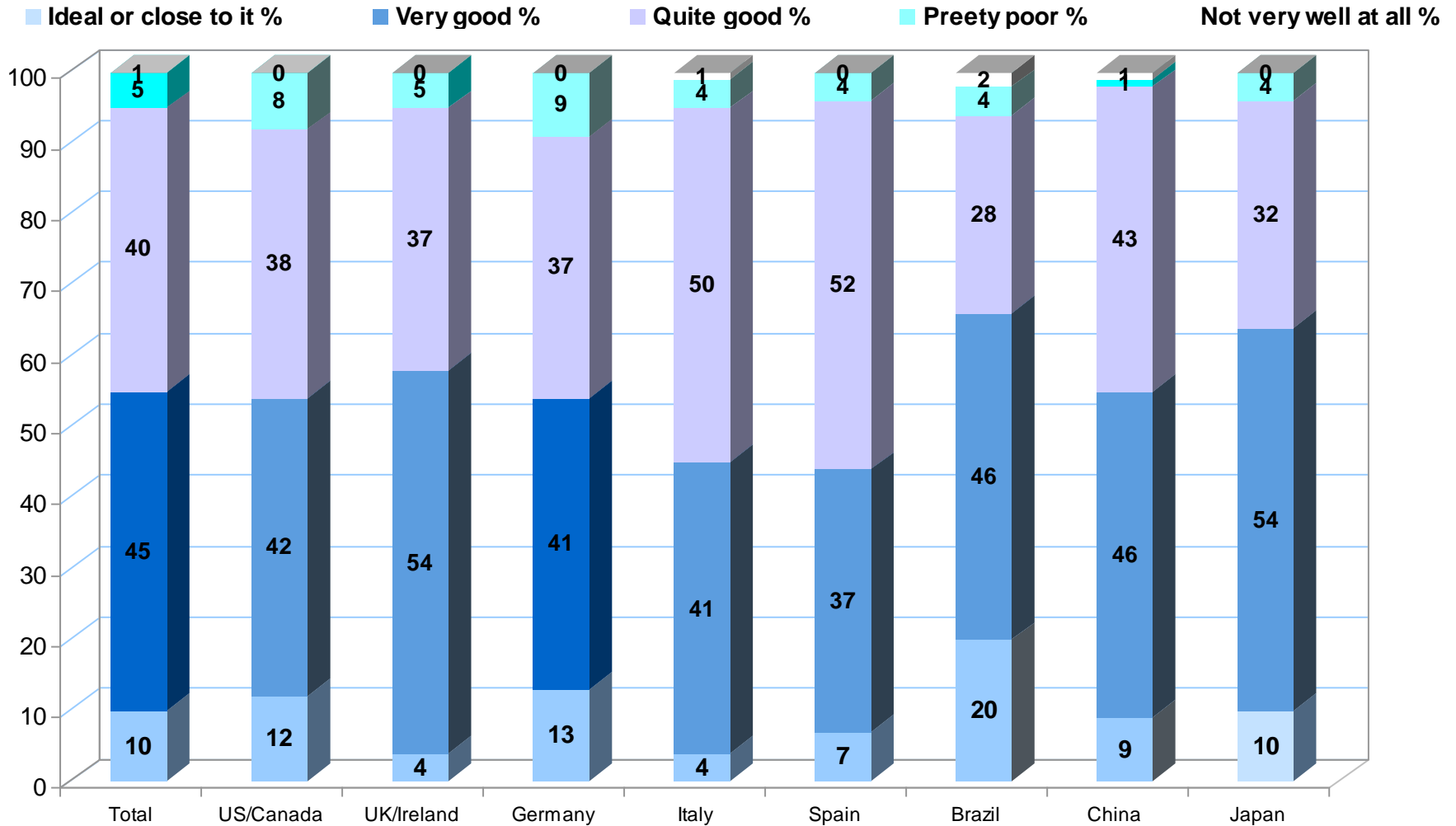
Commitment of the senior sales and marketing management teams to analytics and fact-based decision making

Legend: Totally committed % | Highly committed % | Somewhat committed % | Not very committed % | Not at all committed %

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Not at all committed %	0	0	1	0	0	1	0	0	0
Not very committed %	6	10	8	6	12	5	5	0	0
Somewhat committed %	26	44	18	29	30	28	18	18	22
Highly committed %	50	34	55	52	49	53	49	58	50
Totally committed %	18	12	18	13	9	13	28	23	27
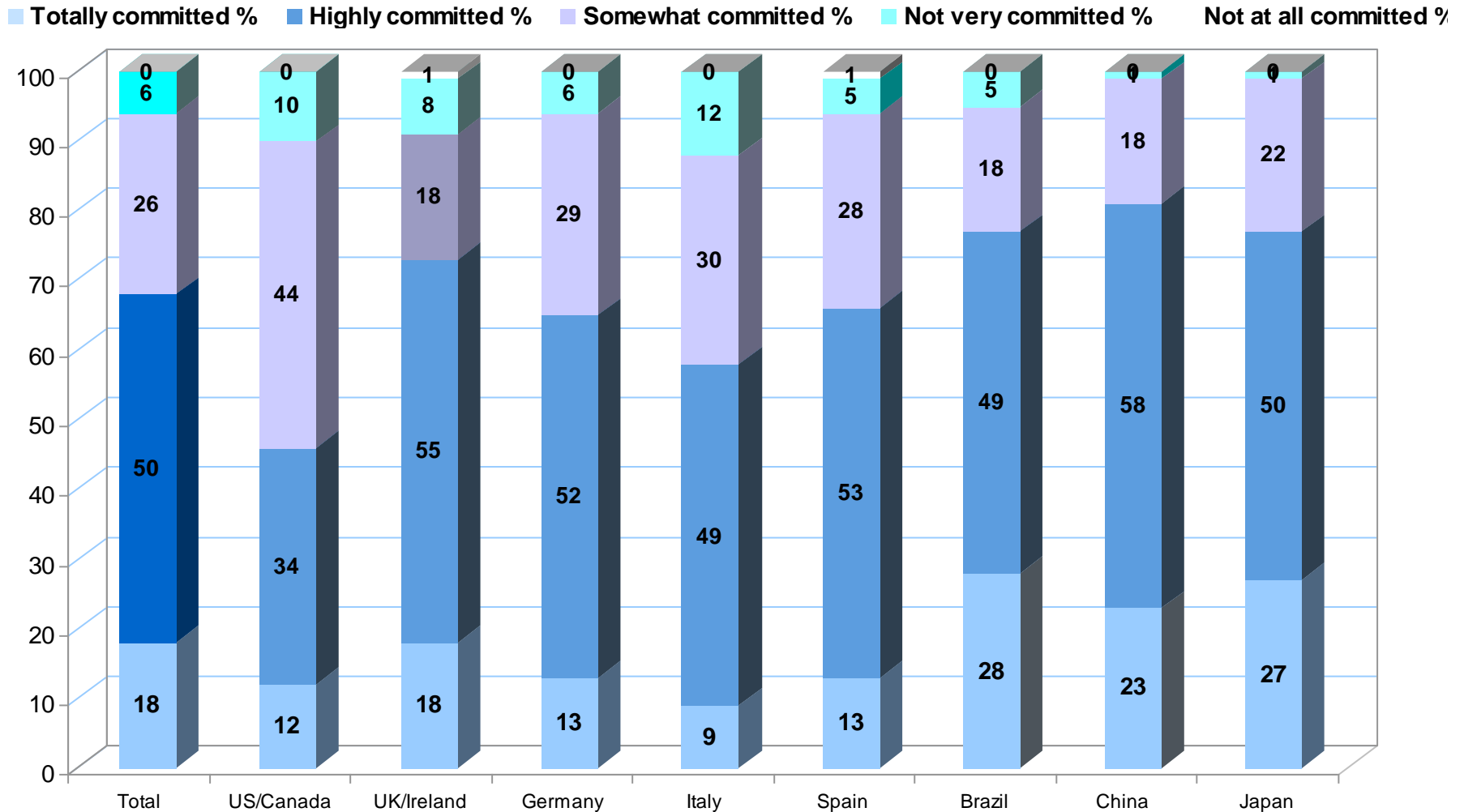
Extent to which organizations use customer data as a predictive tool for sales growth

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Great extent % (1)	39	36	50	37	33	35	42	43	39
Moderate extent % (2)	37	34	33	36	30	34	37	45	46
At least moderate extent % (1+2)	76	70	83	73	63	69	79	88	85
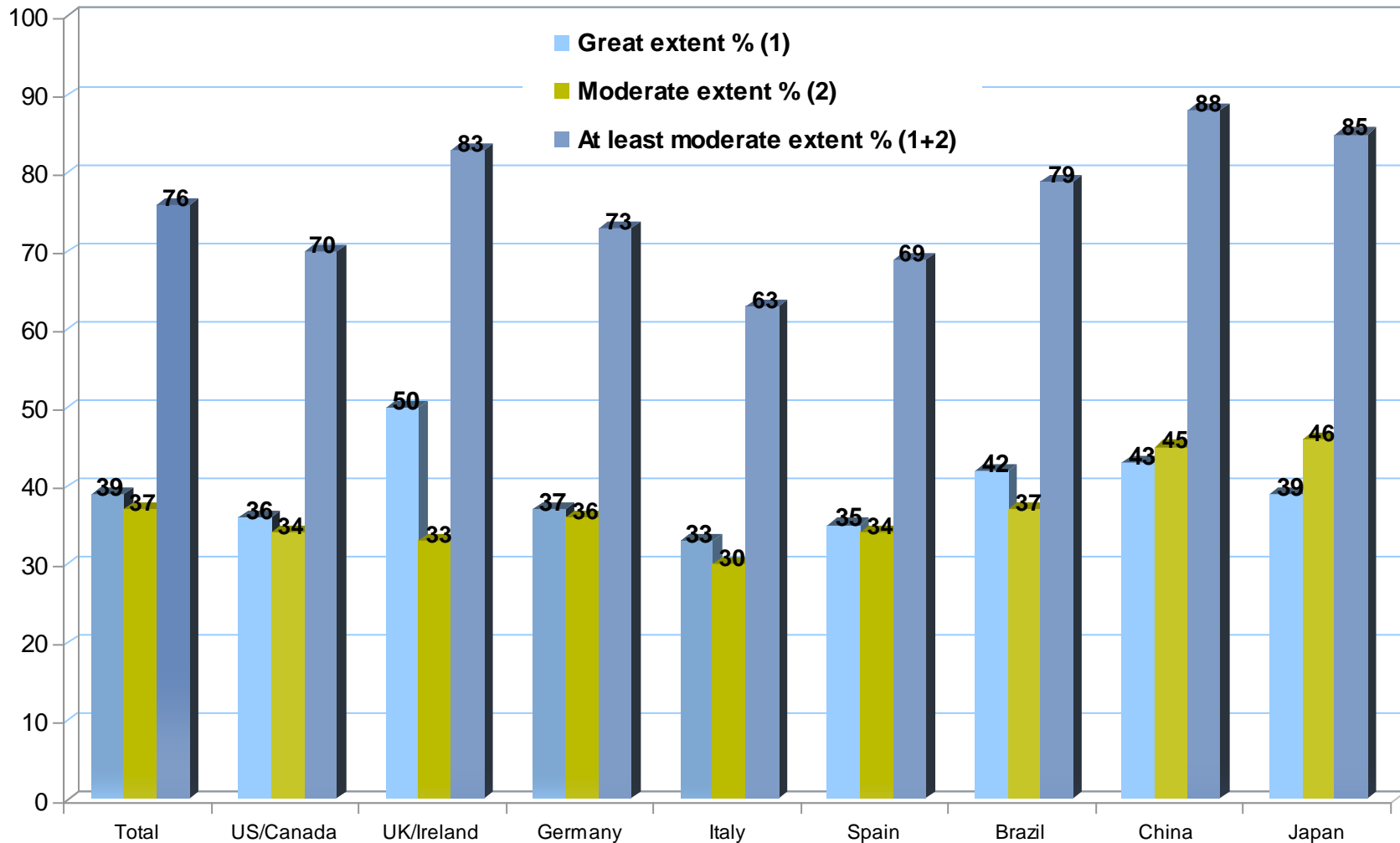
Extent to which organizations use customer data as a predictive tool for competitor performance/activity

Legend:
- Great extent % (1)
- Moderate extent % (2)
- At least moderate extent % (1+2)

Category	Great extent % (1)	Moderate extent % (2)	At least moderate extent % (1+2)
Total	32	47	79
US/Canada	30	47	77
UK/Ireland	38	46	84
Germany	26	47	73
Italy	19	60	79
Spain	31	46	77
Brazil	31	43	74
China	41	46	87
Japan	39	40	79
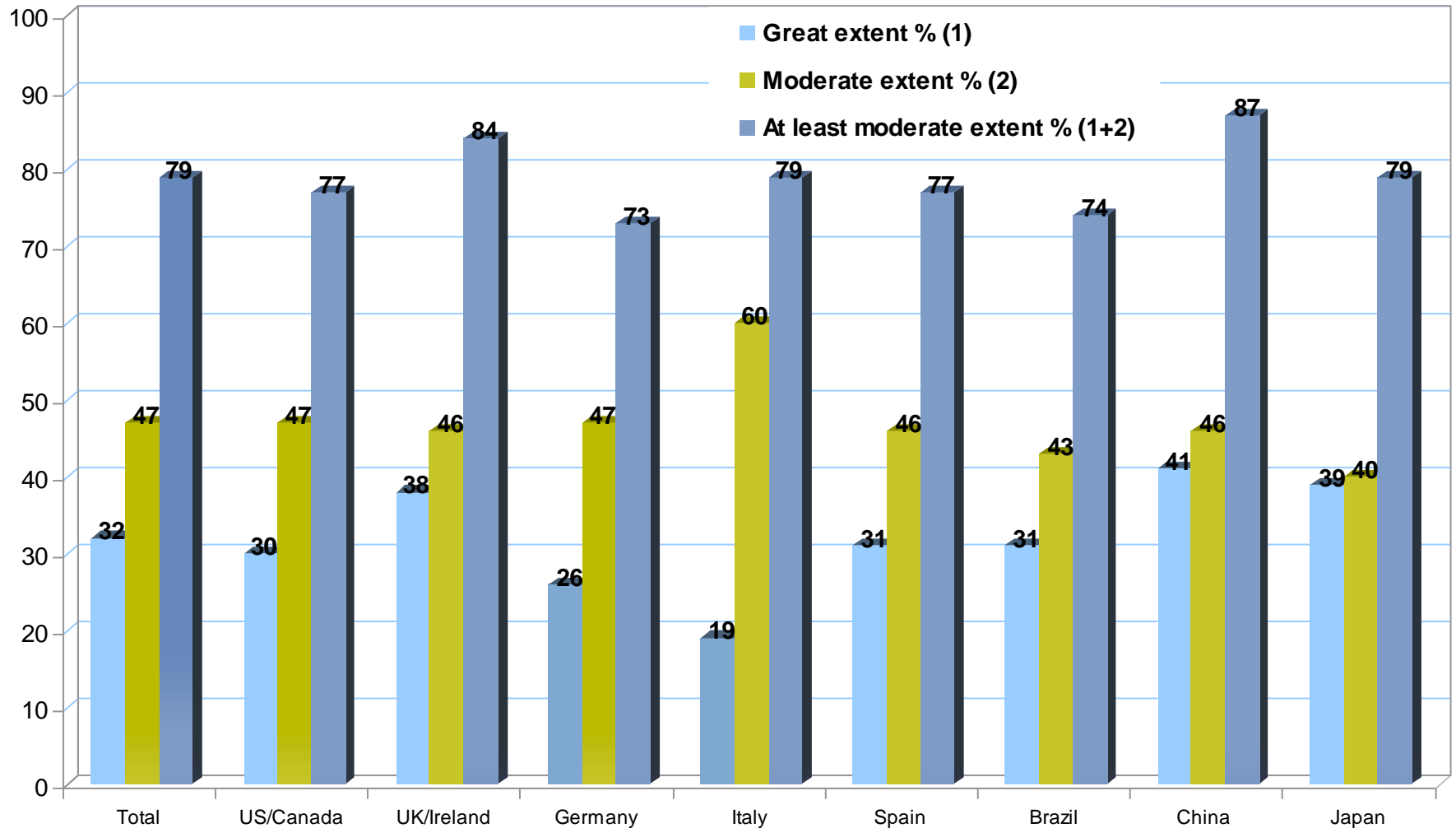
Extent to which organizations use customer data as a predictive tool for market trends

Legend:
- Great extent % (1)
- Moderate extent % (2)
- At least moderate extent % (1+2)

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Great extent % (1)	26	31	26	25	17	25	24	28	35
Moderate extent % (2)	49	40	53	44	56	52	50	53	46
At least moderate extent % (1+2)	76	71	79	69	73	77	74	81	81
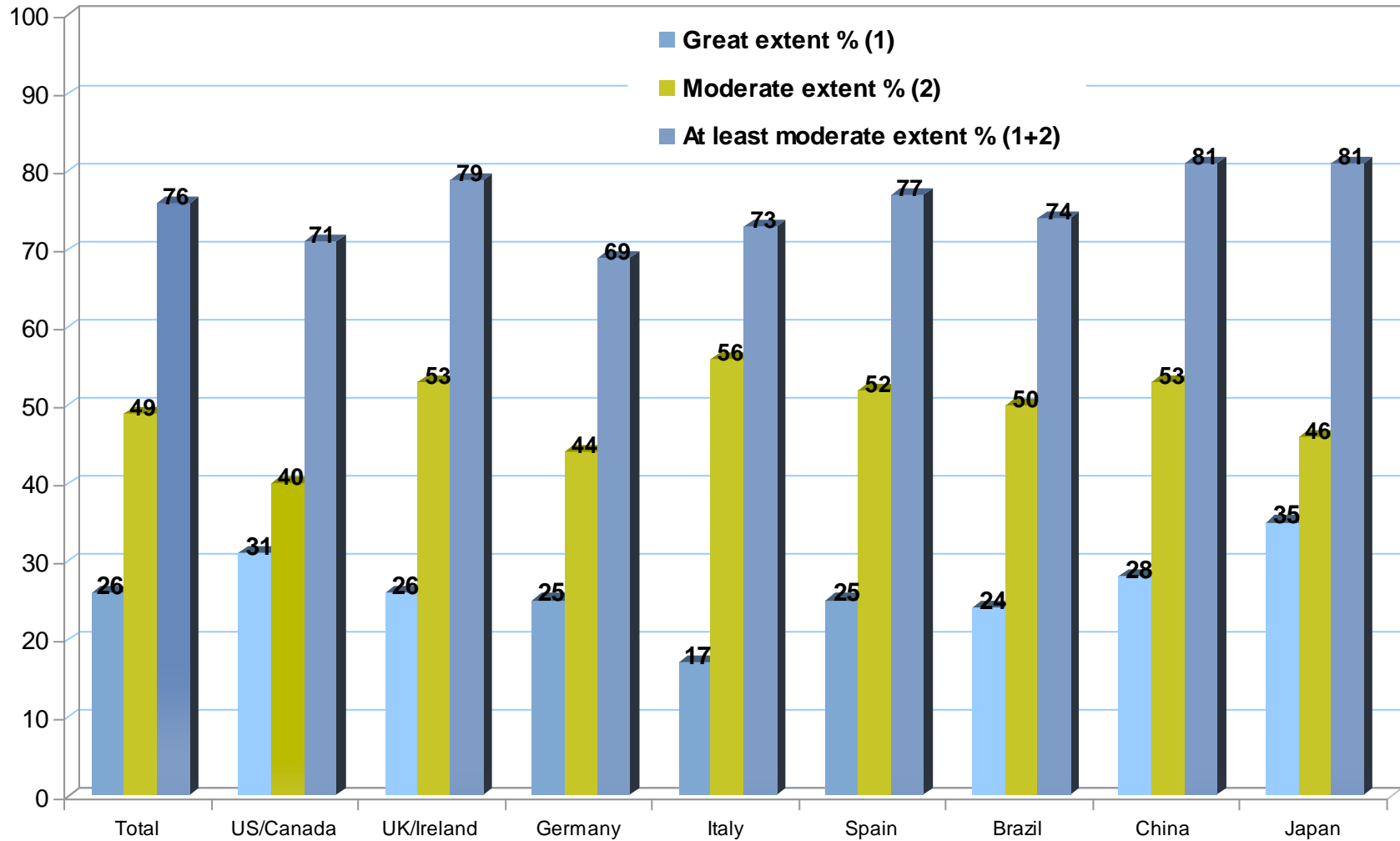
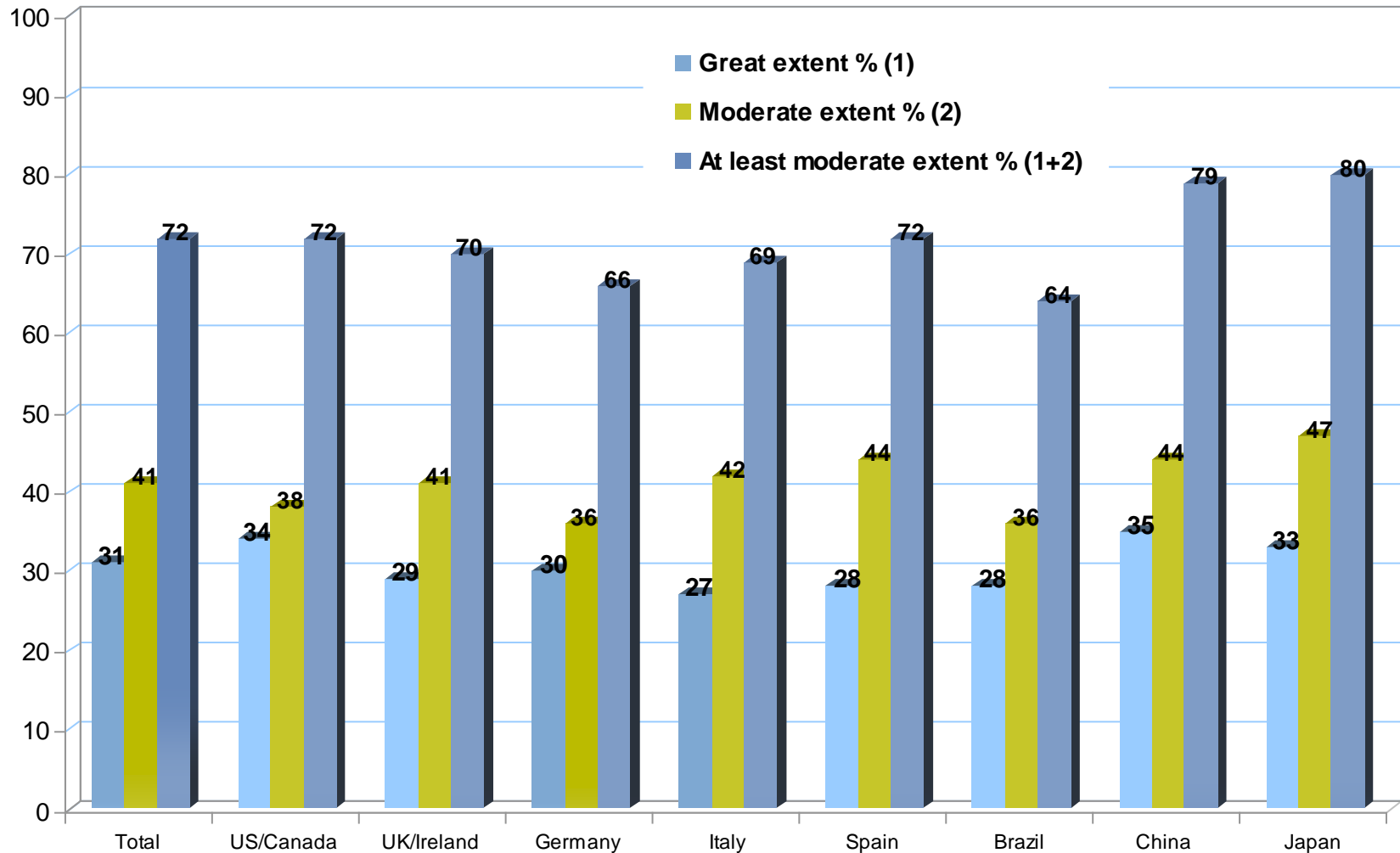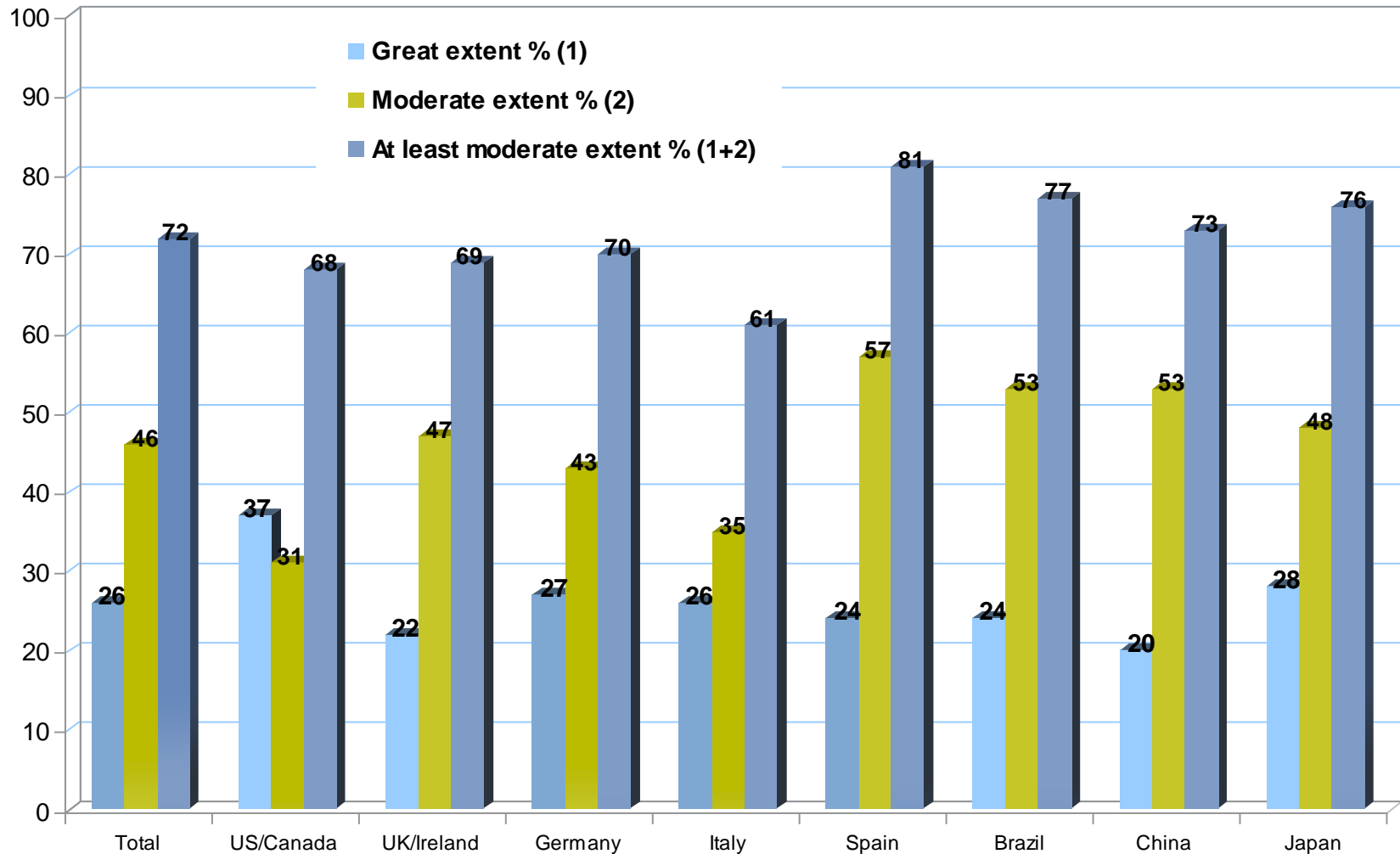# Extent to which organizations use customer data as a predictive tool for price movement

Extent to which organizations use customer data as a predictive tool for product lifecycle

Legend:
- Great extent % (1)
- Moderate extent % (2)
- At least moderate extent % (1+2)

	Total	US/Canada	UK/Ireland	Germany	Italy	Spain	Brazil	China	Japan
Great extent % (1)	26	37	22	27	26	24	24	20	28
Moderate extent % (2)	46	31	47	43	35	57	53	53	48
At least moderate extent % (1+2)	72	68	69	70	61	81	77	73	76

Extent to which organizations use customer data as a predictive tool for new product or service opportunity

Legend:
- Great extent % (1)
- Moderate extent % (2)
- At least moderate extent % (1+2)

Region	Great extent % (1)	Moderate extent % (2)	At least moderate extent % (1+2)
Total	36	35	70
US/Canada	44	26	70
UK/Ireland	36	38	74
Germany	33	30	63
Italy	25	36	61
Spain	42	29	71
Brazil	45	26	71
China	27	48	75
Japan	33	43	76