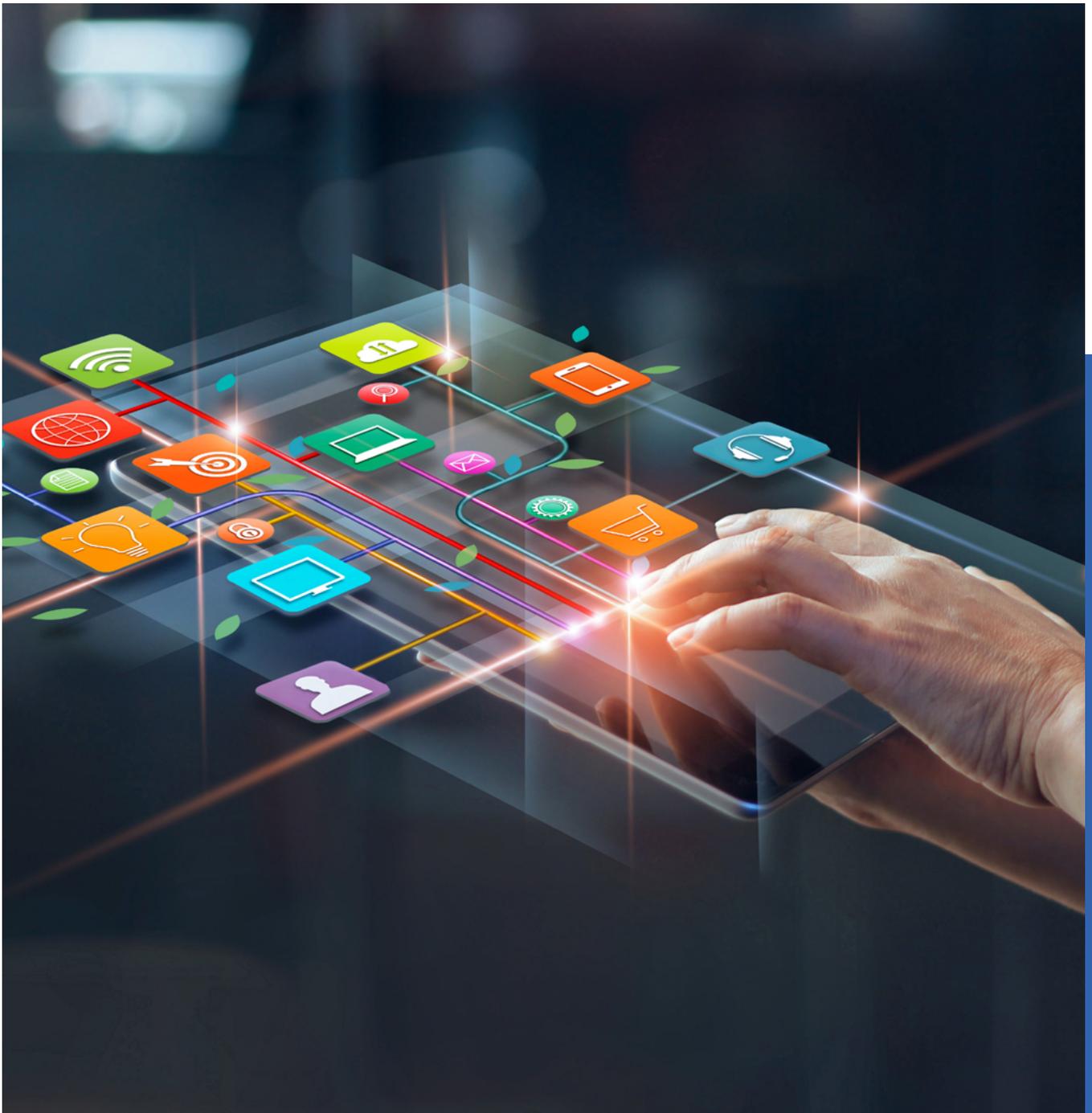


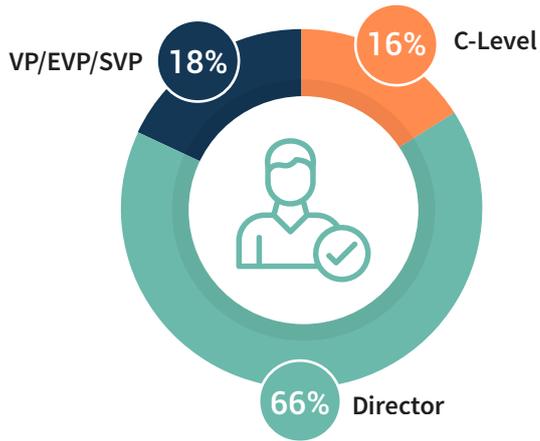
DIGITAL COMMERCE IN AN ERA OF RAPID CHANGE: TREND REPORT



EXECUTIVE SUMMARY

Canam Research partnered with Pivotree and SAP on the topic of Digital Commerce, Data Management, and Supply Chain.

Respondents by seniority:



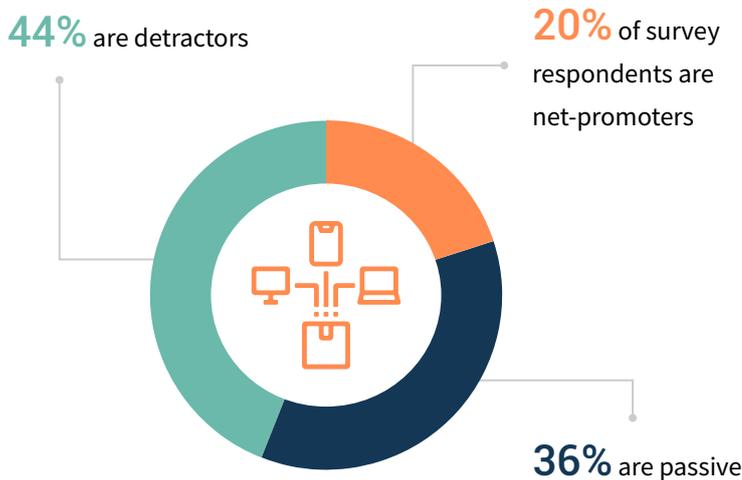
Research focused on:

-  Satisfaction with the current commerce platform
-  Biggest commerce, supply chain, and data management challenges
-  How well commerce strategy and tactics have kept pace with customer behavior
-  Progress with personalization
-  Capacity of the current system to manage product data
-  Future focus areas for improving digital commerce



KEY OBSERVATIONS

■ Satisfaction with current eCommerce platform



■ Managing product data



Only **41%** of survey respondents said their current systems effectively manage product data.

■ Biggest commerce challenges



33% of survey respondents reported challenges with analytics and reporting



30% with shopper experience



28% with inventory management

■ Supply chain challenges



65% of survey respondents said that escalating costs are their biggest supply chain problem

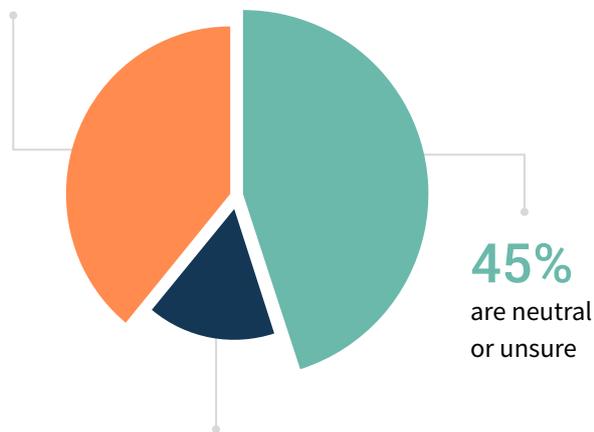
■ Mitigating risk in the current environment



60% of respondents are focusing on operational efficiency to reduce risk

Commerce strategy and tactics keeping pace

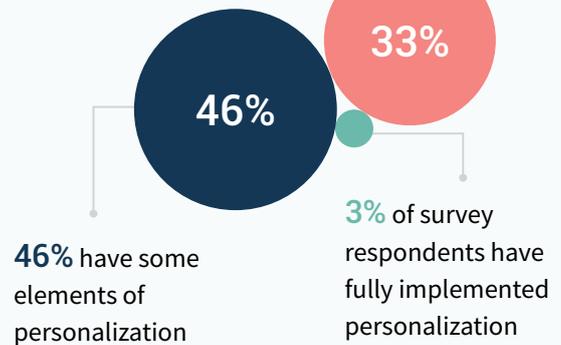
Only **39%** of survey respondents said their commerce strategy and tactics are definitely keeping pace with changes in customer behavior



16% are sure their strategy and tactics have not kept pace

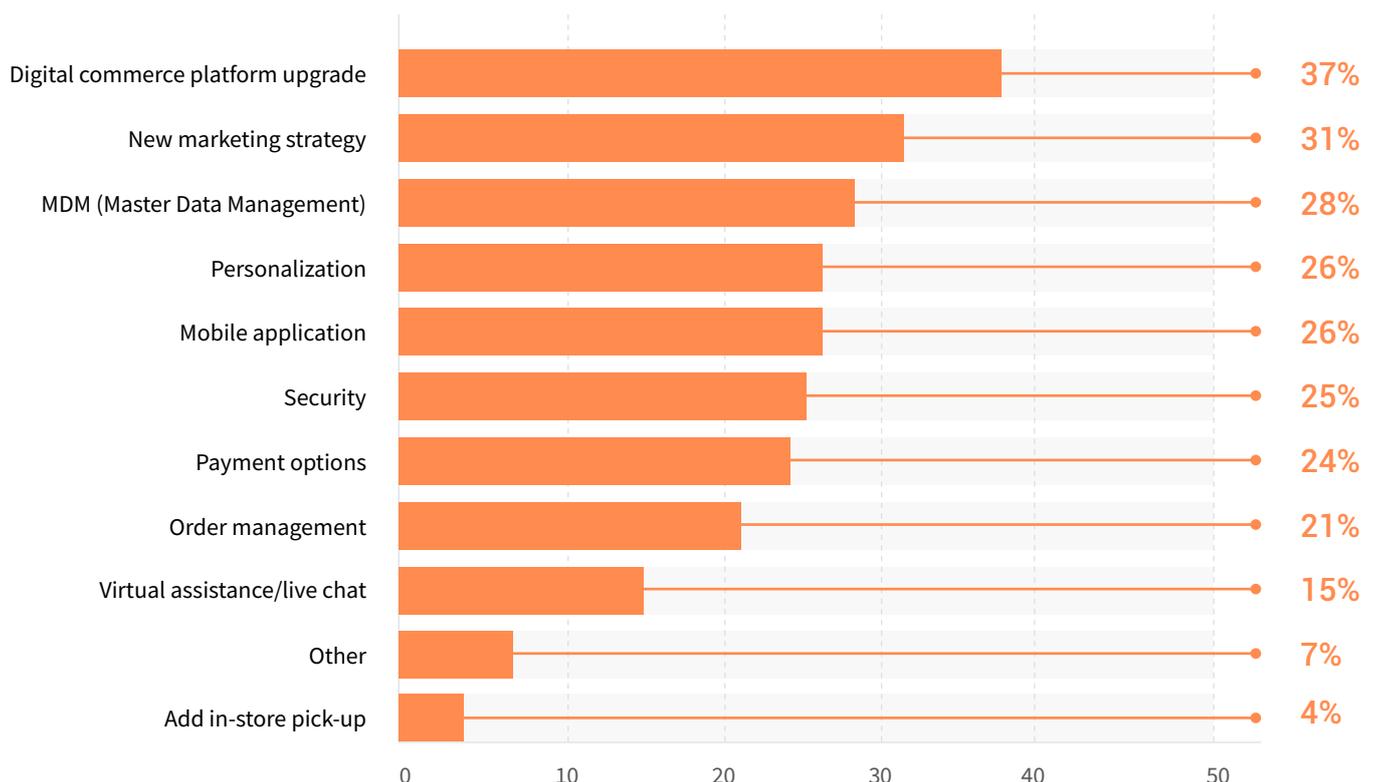
Providing a personalized experience for customers and prospective customers

33% want personalization but haven't started yet



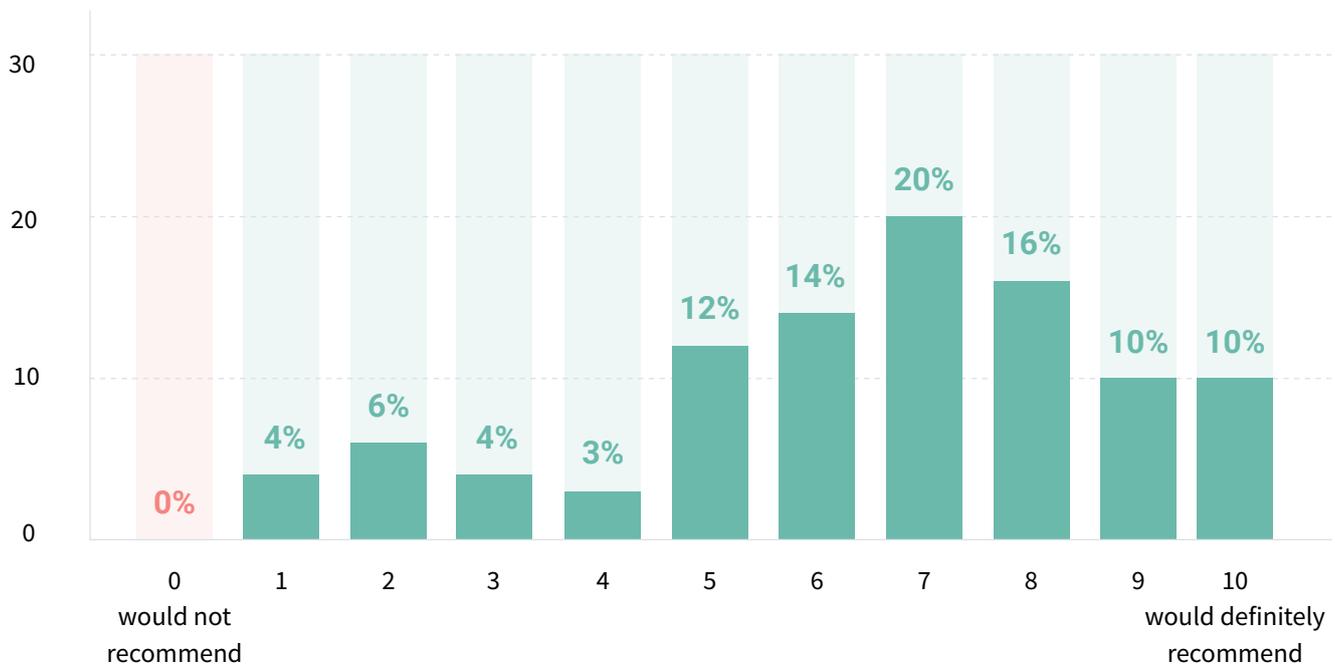
In the next 6 - 12 months, what will your company focus on to improve digital commerce performance?

Overall satisfaction with commerce platforms is not particularly good and over a third of survey respondents will be making an upgrade in the coming months. Attention will be paid to many other areas of the business such as marketing strategy, MDM, personalization, and mobile. The number of focus areas again highlights the complexity of achieving a competitive advantage with digital commerce.



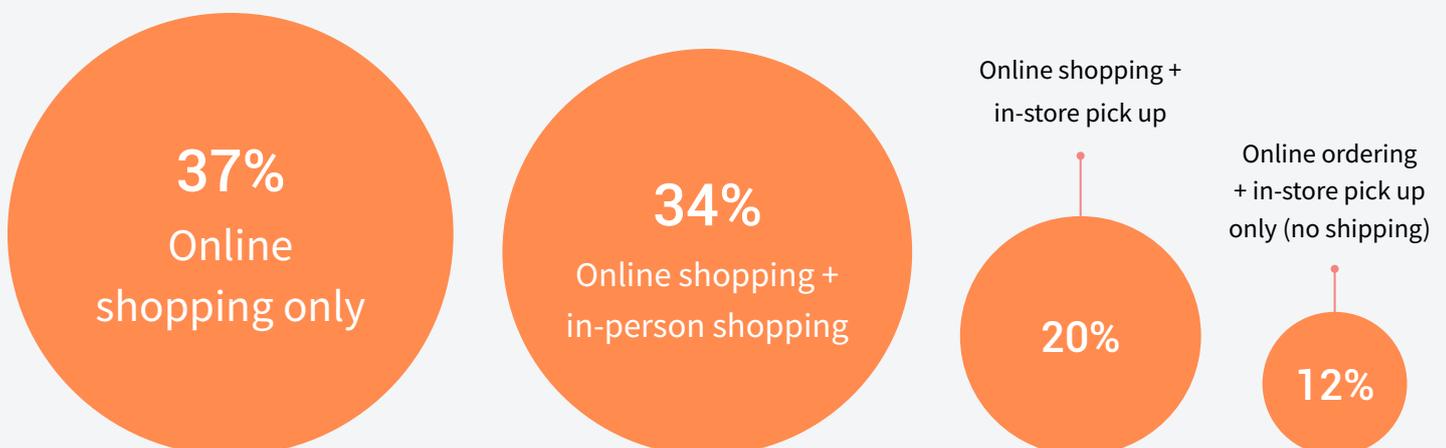
■ How satisfied are you with your current ecommerce platform solution?

The 20% of respondents who rated their satisfaction level at a 9 or 10 are net promoters – they really love their commerce platform. 36% rated their platform 7 or 8 and are neutral – satisfied but don't love it. There is a sizable cohort, however, that is not satisfied with their commerce platform and will be open to making a change.



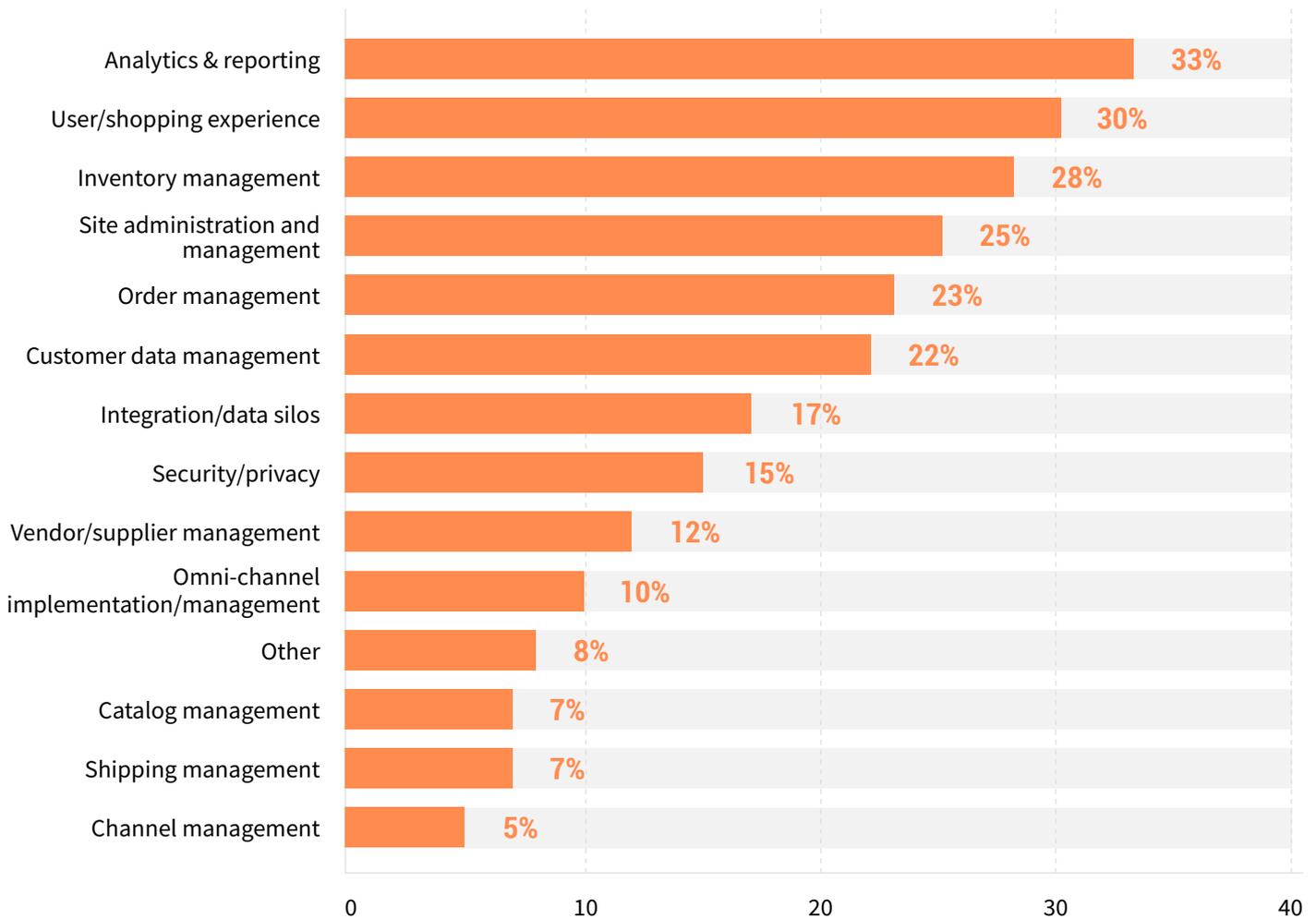
■ Which of the following best describes your commerce model?

Survey respondents represented a good mix of commerce models. Most survey participants go beyond online shopping and have other ways of engaging and serving their customers.



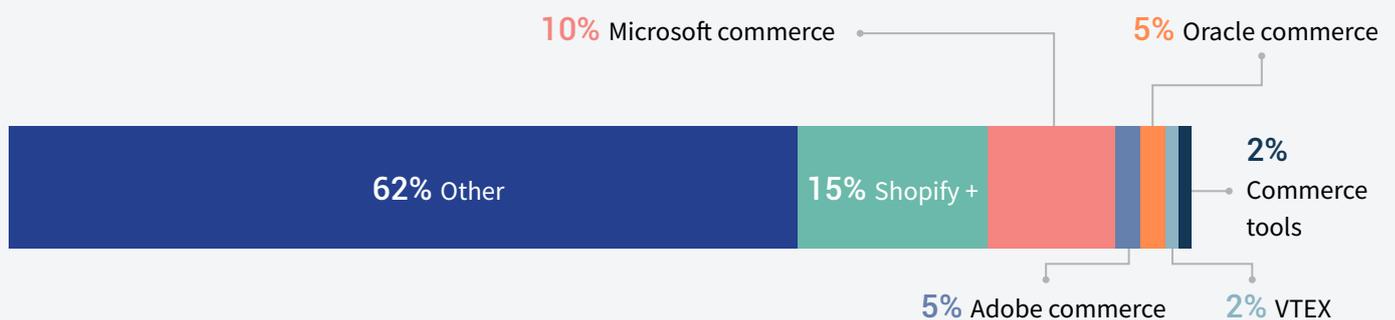
■ What are your biggest commerce challenges?

Challenges with commerce varied widely. While analytics and reporting had the most responses, those who experience this are in the minority. The responses to this question highlight the complexity and number of elements that have to be managed in a modern commerce system.



■ What eCommerce platform are you using?

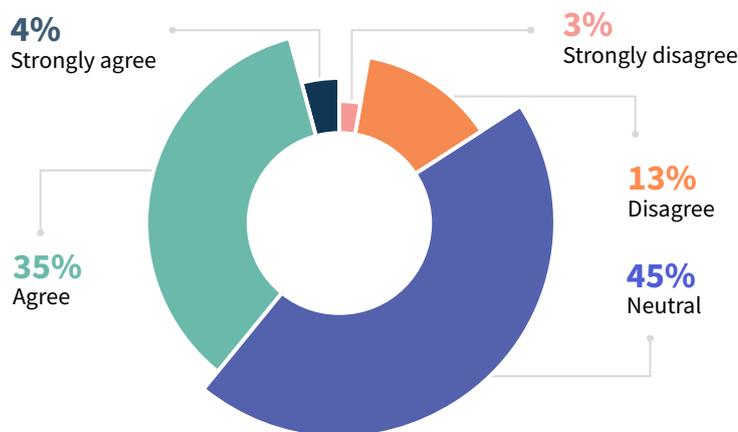
Companies in this survey represented a wide variety of business types including B2B (the majority), B2C, B2B2C and D2C. As such, eCommerce platforms vary widely. We have a large group of “other” responses and the dominant “other” platforms are custom-built.



**■ What is your level of agreement with the following statement?
Our company's digital commerce strategy and tactics have kept pace with changes in customer behavior.**

Providing a superior customer experience requires capturing and managing customer and prospect interaction data. Only about a third of survey respondents say their company does this effectively.

It can be difficult to capture and use interaction data, and companies that decide to improve digital customer experience will need to solve this challenge.



■ Where is your company on its journey to providing a personalized experience for customers and prospective customers?

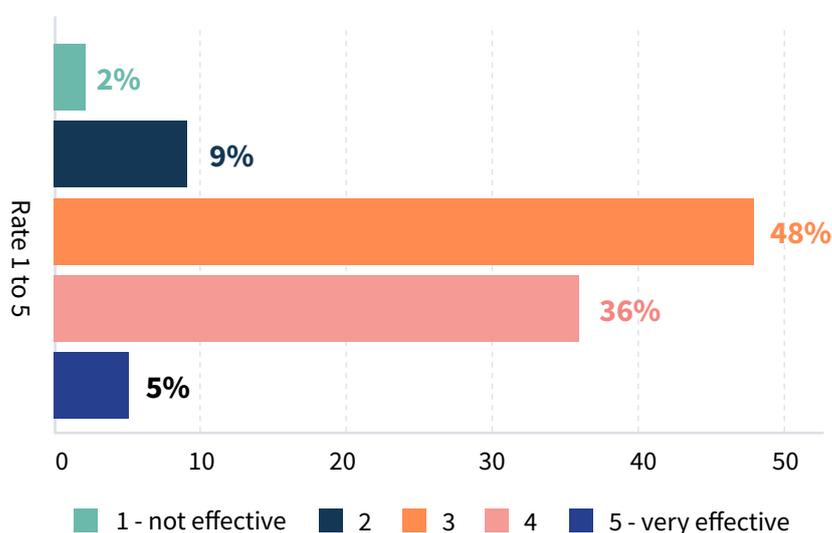
Personalization typically increases conversions and sales, and the majority of survey respondents are striving to provide a personalized experience to customers and potential customers. Getting personalization right can be challenging, so only a small number of respondents have it fully implemented.



■ On a scale of 1 to 5, how effectively do your current systems and processes manage product data?

Managing product data is often a challenge due to the volume and variation of products that are being sold, particularly for B2B.

A sizable cohort of respondents feels certain they are effectively managing their product data, and a larger cohort is not so sure.



■ Where are the biggest challenges impacting your supply chain as a result of global disruption?

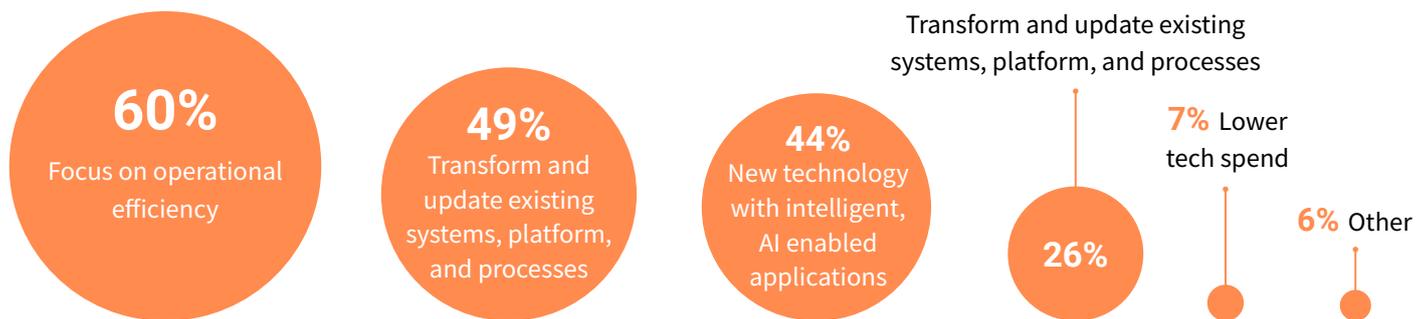
Supply chain disruptions have caused shipping costs to rise and negatively impacted the availability of products, all of which have led to higher costs in general and difficulty keeping up with demand.

Companies are often struggling to upgrade their technology to keep pace with changes brought on by supply chain disruptions.

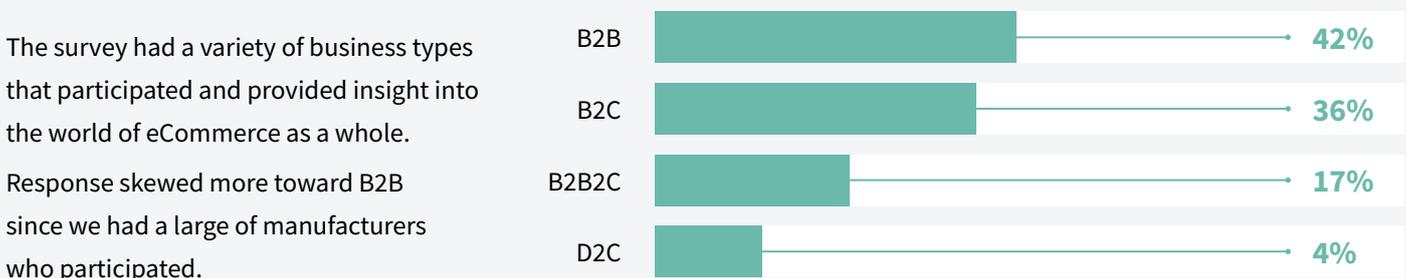


■ Supply chain disruption continues with rising inflation rates and recession looming. What are the areas of focus to mitigate risk and protect your margins?

Reducing risk and protecting margins during times of increased inflation, supply chain disruptions and an uncertain economy are increasing the focus on operational efficiency. Companies will also be looking to make changes to their current systems, platforms, and processes as a way to manage their risk and profitability.



■ Which of the following best describes your business?



Pivotree is an SAP partner and the only end-to-end provider supporting clients from strategy, platform selection, deployment, and hosting through ongoing support: a single expert resource to help companies succeed in an ever-changing digital commerce landscape.

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