

451 Research's

2022 Research Agenda

Key topics, coverage and planned deliverables



451 Research

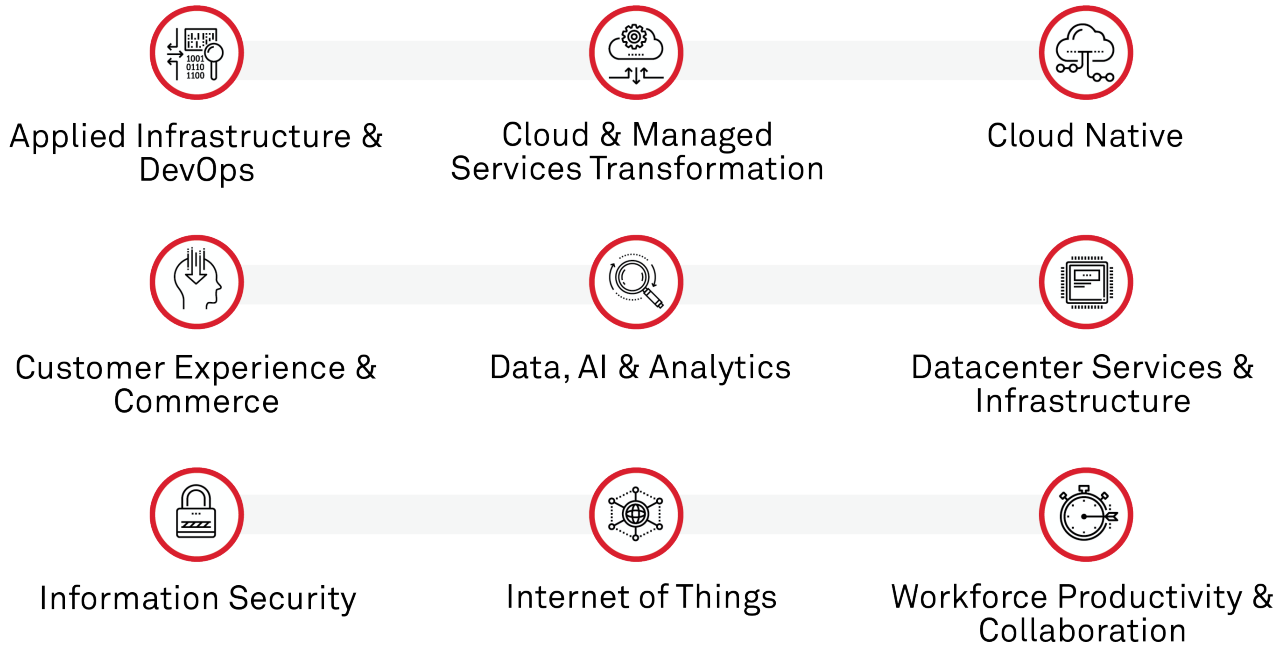
S&P Global

Market Intelligence

Your radar into market disruption, innovation and digital transformation in the IT space.

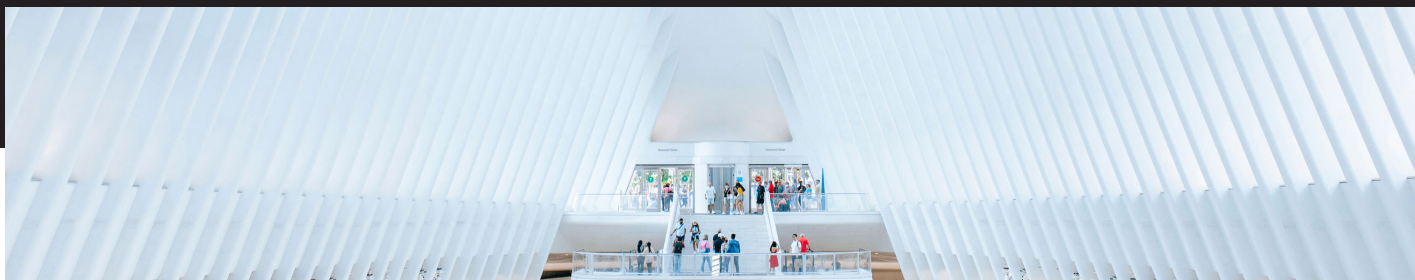
451 Research, a technology research group within S&P Global Market Intelligence, provides a holistic view of innovation across the entire enterprise IT landscape through a combination of expert analyst insight, backed by differentiated data. Our analysts interact with key industry decision-makers every day to deliver the essential intelligence necessary to understand the pivotal role that digital transformation is playing in reshaping our world.

Our research spans nine channels that align with the prevailing issues driving IT innovation, helping clients implement, invent and invest in digital transformation. The research agenda for each channel outlines key topics, analyst coverage and planned deliverables to support our clients' critical business decisions. The pace and extent of this transformation means that many trends span multiple channels; our research approach encourages analyst collaboration both within and between channels, allowing us to surface emerging trends before anyone else. Additionally, for a higher-level perspective on the key trends that will drive digital transformation in 2022 at a strategic level, please refer to our latest [Big Picture report](#).

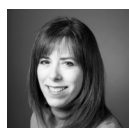


Customer Experience and Commerce

2022 will be a year of IT execution as companies accelerate their formal digital transformation strategies and establish a new 'business as usual.' Improving the customer experience (CX) is at the heart of many initiatives, and continuous improvement requires a well-planned approach to business and technology innovation to remain relevant in the eyes of customers. Once-aspirational views of innovative and immersive digital experiences have transitioned into requirements for employees, customers and partners. Our advertising and marketing technology research explores rapid changes in the vendor landscape to enable more intelligent, personalized experiences that use data, analytics and machine learning to enhance the customer relationship. Our research on digital experience technologies investigates how content tools, e-commerce and payments technology will undergo continued architectural disruption. Our customer service technology research focuses on the impact of new forms of digital channels.



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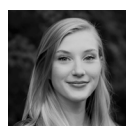
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Key Research Topics and Themes for 2022

● **Software platforms and the future of the digital economy**

Context, collaboration and control drive the rapid investments in fresh approaches to create composable experiences. The acceleration of digitization, cloud and data is underpinning innovation and CX performance. Many SaaS platforms have evolved into operating systems for their customers and are now leveraging their trusted positions as a beachhead to broaden footprints in focused industries, either through M&A or organic development.

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● **Data-driven experience economy**

Over the past year, businesses that allocated a larger portion of their overall IT budgets to digital transformation also accelerated the pace of strategic projects, such as cloud-native technologies and data analytics initiatives, which are needed to support real-time, data-driven goals. Heightened demand for context, collaboration and control in all customer interactions requires investment in new platforms that optimize CX. Individualizing and orchestrating unique customer journeys is key, with only 12% of respondent businesses optimized for real-time customer journeys.

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● **Digital experience acceleration requires investment in unified commerce**

Businesses are doubling down on their CX strategies, with a noticeable shift in dollars being funneled into digital experiences. Keeping up with the sheer velocity of digital experiences amid growing consumer appetites is driving business interests toward a more flexible and iterative technology stack. We see this evolution largely following a microservices, API-first, cloud-native and headless formula.

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● **Emerging commerce and customer experiences**

The onset of Web3 and sub-components such as non-fungible tokens (NFTs), cryptocurrencies and the metaverse have significant implications for the customer experience and commerce. Our research will explore how these trends are evolving and their potential impact on businesses as they look to engage with customers in this burgeoning ecosystem.

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● **Payment optimization and orchestration**

Payments have become a strategic area of focus for high-performing enterprises. We track the strategies, technologies and vendors that leverage payments to increase transaction success rates, drive operational efficiencies and deliver improved commerce experiences.

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● **Fraud prevention as a growth lever**

The first chapter of fraud prevention was about chargeback mitigation. The next chapter is about minimizing chargebacks while driving revenue growth and streamlining the customer experience. Our research focuses on the key fraud challenges facing merchants, fraud trends and the impact of fraud prevention on customer experience.

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● **The move toward more integrated and diversified buy now, pay later (BNPL) offerings**

BNPL is changing the way consumers pay, the way merchants accept payments and the way lenders lend. We've been closely following how this market continues to evolve from multiple perspectives: merchant, consumer, lender and regulatory.

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● **Service is the new marketing**

The human element is becoming more important as business relationships become less transactional between people and more nuanced, tangled interactions between people and the systems and devices they use daily. Using real-time conversation to discover, engage and transact through SMS, video and chat is now the norm. Customer data is also changing the trend for storytelling as businesses strive to connect with customers who demand more personalized and immersive engagements across mobile, social platforms and video channels.

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Customer success comes of age

Customer success software is designed to increase renewals, reduce churn, and encourage upselling and cross-selling. As the subscription economy grows, customer success will be an attractive area for investments and acquisitions. It has all the traditional sales, marketing and service elements but blends them in new ways. In the conventional model, the revenue process begins with marketing, continues to sales and ends in service. Under the customer success model, the process starts with customer onboarding, transitions to marketing and finishes with sales when it's time to renew. The customer success market is expected to grow at a CAGR of 42.2% through 2025, resulting in \$1.3bn in revenue.

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Sales enablement's contribution to top-line revenue growth

The goal of sales enablement is to shorten the sales cycle. This a broad segment with many approaches but one common goal. Additionally, it is the segment most likely to split into new markets based on use cases. Consequently, sales enablement has become an attractive category for investment and M&A, with more than its share of unicorns.

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The future of B2B revenue generation is conversational

Dialog-driven exchange through an electronic medium is generating significant revenue. This segment is a game changer from a user-interface perspective, and its features will likely trickle into all the other markets over time.

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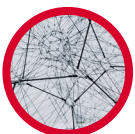
Voice of the Connected User Landscape >

Insight into ever-changing connected technology buying behavior and preferences.



Voice of the Enterprise >

Rapid, relevant and predictive insight on customer sentiment, technology choices and spending plans.



Voice of the Service Provider >

Qualifies and quantifies buying behaviors, business drivers and strategic priorities for the expanding universe of tech service providers.

Our analysts engage directly with IT industry leaders to **understand current market dynamics.**



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Produced daily by our global team of expert analysts, our Market Insight reports provide the critical analysis, insight and data you need to stay informed and competitive on the markets, players and issues you care about, in a highly consumable format.

Impact Reports

Briefing-driven analysis of a specific vendor, covering the impact its business model, services, technologies and go-to-market strategy will have on the market. A company SWOT analysis is included in every report.

Spotlight Reports

Analysis of new developments in a market sector or technology area that builds on previously published analysis to provide context and real-time updates on innovation and disruption as it happens.

Analyst Notes

Concise research notes that highlight and contextualize a recent market or vendor development.

Deal Analyses

Event-driven analysis of a tech acquisition, including the deal rationale and an examination of its broader impact on competitors, adjacent players and the overall market.

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Sector IQ, Acquirer IQ, Target IQ and Debut IQ reports provide **anticipatory analysis of potential M&A activity or consolidation trends**. Analysis is focused on a specific sector or company likely to acquire, likely to be acquired, or that has just completed an IPO.

User Deployment Reports

Accounts and analysis of real-world end-user deployment experiences with new, innovative technologies, products and services, providing a 'sanity check' on what vendors and VCs are telling our analysts.



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