

# The State of Retailing Online 2013 - Marketing

Thank you for participating in the "State of Retailing Online 2013: Marketing" research! In this study, we focus specifically on various aspects of marketing. The survey is comprised of 23 questions plus 5 "demographic" questions about your company so we can segment the final data results.

All individual responses will be confidential and we will report results only in aggregate across all participating retailers.

Thank you for participating and supporting our industry research!

## Survey Outline

This survey is divided into the following 5 sections:

- Section I focuses on your company's interactive marketing budget
- Section II focuses on customer acquisition tactics
- Section III focuses on mobile and cross-channel marketing
- Section IV focuses on marketing team staffing
- Section V asks for your contact and company information

## Frequently Asked Questions

1. *What if I don't have all of the data requested in the survey?* In some cases you may not have access to precise answers. Please answer to the best of your ability, with approximations where necessary.

2. *What if I have other questions?* Please take a few minutes to review the FAQ page we've developed at <http://www.shop.org/soro-faq>, which answers questions about the survey and the online survey tool itself. If you have further questions, please don't hesitate to contact us also at [retailresearch@forrester.com](mailto:retailresearch@forrester.com).

Thank you for participating in the State of Retailing Online 2013: Marketing Study!

## 1. In case we have any questions for you after you have completed this survey, please indicate your contact information below. (Optional)

Name:

Company:

Email Address:

## 2. What is the size of your annual marketing budget that is dedicated to your digital retail business (includes Web and mobile devices)? (Please select one)

- Less than \$500,000
- \$500,000 to less than \$1 million
- \$1 million to less than \$3 million
- \$3 million to less than \$5 million
- \$5 million to less than \$10 million
- \$10 million or more
- Don't know

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## 3. Please indicate the percentage (%) of your total interactive marketing budget allocated to each of the following (including Web, smartphone and tablet device):

|  |                      |
|--|----------------------|
| Email to house list  | <input type="text"/> |
| Email to prospecting list  | <input type="text"/> |
| SEO/natural search (e.g., pages optimized for search engines to find you, such as Meta tags) | <input type="text"/> |
| Pay-for-performance search placement (Bing, Yahoo! Advertising, Google AdWords)              | <input type="text"/> |
| Google Product Listing Ads (PLAs)  | <input type="text"/> |
| Affiliate programs (3rd-party networks/in-house programs, stores on other retail sites)      | <input type="text"/> |
| Wireless SMS and WAP text messages   | <input type="text"/> |

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## 4. For which interactive marketing tactics are you spending more in 2013 than in 2012? (Please check all that apply.)

- Email to house list
- Email to prospecting list
- Traditional portal deals (e.g., AOL, MSN, Yahoo!)
- Online marketplaces (e.g., Amazon, eBay, Rakuten, Sears)
- SEO/natural search (e.g., pages optimized for search engines to find you, such as Meta tags)
- Pay-for-performance search placement (Yahoo! Advertising, Google AdWords, pay to be near the top of search results, include mobile search in this figure)
- Product Listing Ads (PLAs)
- Text ads on other sites (e.g., AdSense, contextual placement)
- Comparison/other product shopping engines (e.g., Google Shopping, Shopzilla.com, Shopping.com)
- Remarketing/retargeting of shoppers in online ads
- Behavioral targeting of shoppers in online ads
- Affiliate programs (3rd-party networks/in-house programs, stores on other retail sites)
- Pop-up, pop-under, or pop-over ads
- Blogs or message boards
- Social networks (e.g., ad placements, fan pages, custom mini-stores)
- Facebook
- Twitter (including Vine)
- Pinterest
- Instagram
- YouTube
- Wireless SMS and WAP text messages

Other (please specify)

## 5. Do you generally run the same marketing mix across web, smartphone, and tablet, or do you optimize your campaigns based on different usage patterns by device?

- We generally run the same marketing mix across desktop, smartphone and tablet
- We optimize our campaigns by device – i.e. our campaigns are not the same across desktop, smartphone and tablet

Comments:

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**6. How are you incorporating Google Product Listing Ads (PLAs) into your marketing plan? Are PLAs replacing other marketing tools (whether in whole or in part)? How do PLAs perform compared to other marketing vehicles?**



### Customer Acquisition.

**SECTION II. CUSTOMER ACQUISITION.**

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## 7. Which of the following have been your TOP THREE most effective sources used to acquire customers in the past year? (Please select THREE)

- Email to prospecting lists
- Traditional portal deals (e.g., MSN, AOL, Yahoo!)
- Online marketplaces (e.g., Amazon, eBay, Sears)
- Remarketing/retargeting of shoppers in online ads
- Behavioral targeting of shoppers in online ads
- Text ads on other sites (e.g., AdSense, contextual placement)
- Search engine marketing (incl. SEO, paid keyword placement, and pay-for-performance search, include mobile search in this figure)
- Organic traffic
- Comparison/other product shopping engines (e.g. Nextag, Shopzilla.com, PriceGrabber, Shopping.com)
- Flash sales of merchandise on other sites (e.g., Gilt Groupe, OneKingsLane)
- Affiliate programs
- Co-registrations on other sites
- Offline advertising (e.g., TV, print, offline advertising)
- Direct mail (mailings and in-catalog marketing)
- Credit card/store shopper appends
- Sweepstakes
- Flash sales (e.g., limited-time promotions)
- Blogs
- Facebook
- Twitter
- Pinterest
- Instagram
- YouTube
- SMS/mobile shopping applications
- Marketing from alternative payment providers (e.g., PayPal, Bill Me Later)

Other (please specify)

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### 8. In 2012, how effective was paid search compared to 2011 in terms of REVENUE?

- More effective
- Same effectiveness
- Less effective

Comments:

### 9. In 2012, how effective was paid search compared to 2011 in terms of COST?

- More effective
- Same effectiveness
- Less effective

Comments:

## Mobile & Cross-Channel Marketing.

### SECTION III. MOBILE AND CROSS-CHANNEL MARKETING.

### 10. Which group / department owns the mobile marketing budget within your company? (Please choose one.)

- Marketing
- eCommerce / Web Team
- Mobile (as independent group)
- IT

Other (please specify)

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## 11. Do you currently or do you plan to use any of the following mobile marketing tools?

|                                    | Currently Using       | Expect to Implement in 2013 | Expect to Implement in 2014 or later | No plans at this time |
|------------------------------------|-----------------------|-----------------------------|--------------------------------------|-----------------------|
| SMS Campaigns                      | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Check-in campaigns                 | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Other location based marketing     | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Identifying device IDs             | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| QR codes or other barcode scanning | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Mobile email optimization          | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Smartphone paid search campaigns   | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Tablet paid search campaigns       | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Mobile display ad campaigns        | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |
| Tablet display ad campaigns        | <input type="radio"/> | <input type="radio"/>       | <input type="radio"/>                | <input type="radio"/> |

## 12. What percent of your total paid search budget is for mobile campaigns on SMARTPHONES?

- None
- Under 5%
- 5-10%
- 10-25%
- 25-50%
- 50%+

## 13. What percent of your total paid search budget is for mobile campaigns on TABLET DEVICES?

- None
- Under 5%
- 5-10%
- 10-25%
- 25-50%
- 50%+

## 14. What percentage of your emails in a given marketing campaign is opened on:

Smartphones

Tablet devices

## 15. How important is it to your company to track customers across channels? How mature are your company's cross-channel tracking capabilities?

## 16. If you use SMS campaigns, what is your current SMS list size? (If you don't currently use SMS campaigns, please proceed to the next question.)









## 17. For visits to your sites on SMARTPHONES, where does that traffic originate?

|   |  |                              |
|---|--|------------------------------|
| <input type="checkbox"/> <input type="text"/> | Directly accessing the mobile-optimized site (typing in the mobile site URL) | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | App  | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | Email  | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | Search   | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | Facebook, Twitter, and/or other social media                                 | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | Links from SMS or texts  | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | 3rd party apps (e.g. TheFind, Google Catalog, CatalogSpree, etc.)            | <input type="checkbox"/> N/A |
| <input type="checkbox"/> <input type="text"/> | Other  | <input type="checkbox"/> N/A |



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## 18. For visits to your sites on TABLETS, where does that traffic originate?

|  |  |                              |
|--|--|------------------------------|
| <input type="checkbox"/>  | Directly accessing the mobile-optimized site (typing in the mobile site URL) | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | App  | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | Email  | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | Search   | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | Facebook, Twitter, and/or other social media                                 | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | Links from SMS or texts  | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | 3rd party apps (e.g. TheFind, Google Catalog, CatalogSpree, etc.)            | <input type="checkbox"/> N/A |
| <input type="checkbox"/>  | Other  | <input type="checkbox"/> N/A |

## 19. Do you provide mobile coupons to customers for use in-store? (Please select all that apply.)

- Yes – coupons provided via an app
- Yes – coupons sent to customers via email
- Yes – coupons sent via SMS (short message service) or text
- Yes – other (please elaborate)
- No – we don't provide mobile coupons

Comments:

## 20. If you have used barcodes in your marketing, how would you describe the campaigns? (Please check all that apply.) "The barcodes go to:"

- Dynamic content
- An existing web page
- Video

Other (please specify)

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**21. Are you considering using geofencing technology for out of home advertising (e.g. location triggered marketing when a consumer enters a particular area - for example, Shopkick)?**

- We already use geofencing technology to target consumers
- Yes – will explore in 2013
- Yes – will explore in 2014 or later
- No – we have no plans to try at this time

**22. How strategically important is it to your company to execute on well-integrated cross-channel marketing campaigns that span a combination of in-store, print ads, TV commercials, social media presence, email and online store?**

- Very important – we want to tell one unified brand story
- Somewhat important – we might do this for specific campaigns but not all the time
- Not important – we leverage each marketing vehicle for what it does best

Comments:

## Marketing Team Staffing.

### SECTION IV. MARKETING TEAM STAFFING.

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## 23. How are you staffing your company's digital marketing team this year? (Please check all that apply.)

|                          | Hiring for open position(s) in 2013 | Outsourcing in 2013      | Moving from the e-commerce team to another team in 2013 (e.g. Corporate Marketing) | Phasing out positions in this area | No change foreseen in this area | N/A                      |
|--------------------------|-------------------------------------|--------------------------|--|------------------------------------|---------------------------------|--------------------------|
| Affiliate Marketing      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Email Marketing          | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| SEO                      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Natural / organic search | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Mobile Display Ads       | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| SMS / MMS marketing      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Mobile Search            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Social Media             | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |
| Marketing Analytics      | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/>           | <input type="checkbox"/>        | <input type="checkbox"/> |

Comments:

## Contact & Company Information.

### Section V. Company Information.

## 24. Which of the following describes your business? We are... (Choose only one)

- Multi-channel - primarily store based (more than 50% of sales from physical stores)
- Multi-channel - primarily catalog based (more than 50% of sales from catalog)
- Multi-channel - primarily online based (more than 50% of sales online)
- Multi-channel without a majority of sales from any single channel - physical store, catalog, or online
- Online pureplay (online only)
- Branded manufacturer

Other (please specify)

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**25. In 2012, what was the annual revenue of your company across ALL channels?  
(Choose only one)**

- Less than \$10 million
- Between \$10 million and less than \$50 million
- Between \$50 million and less than \$100 million
- Between \$100 million and less than \$250 million
- Between \$250 million and less than \$500 million
- Between \$500 million and less than \$1 billion
- Between \$1 billion and less than \$5 billion
- Between \$5 billion and less than \$25 billion
- \$25 billion or more

**26. In 2012, what were the total ONLINE sales (Web and mobile – smart phone and/or tablet device) for your company? (Select one)**

- Less than \$10 million
- \$10M to less than \$25M
- \$25M to less than \$50M
- \$50M to less than \$75M
- \$75M to less than \$100M
- \$100M to less than \$500M
- \$500M to less than \$1 billion
- \$1 billion or more

**27. How long has your ONLINE (Web and mobile channels) business been in operation?**

- Less than 1 year
- 1 to less than 4 years
- 4 to less than 10 years
- 10 or more years

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**28. Please indicate how your calendar year 2012 total company revenue breaks down by channel. Estimate the percent of sales derived from each channel. If online is less than 5%, please add one decimal (e.g. "3.6%"). (Total should equal 100%.)**

|   |                      |
|---|----------------------|
| Online sales (including mobile – smart phone & tablet device) | <input type="text"/> |
| Stores/physical location                                      | <input type="text"/> |
| Catalog/phone   | <input type="text"/> |
| Wholesale (B2B)   | <input type="text"/> |
| Other (e.g., on-site advertising)                             | <input type="text"/> |

**29. If you could add one question to a future State of Retailing Online survey, what would that be?**

Thank you for participating in our survey! Please be on the lookout for the results of this survey in July of this year.