



March 2015

PATH-TO-PURCHASE ROUNDUP

The path to purchase is often a long and winding one. Consumers move back and forth across devices, channels and platforms, and may research in one place, buy in another and desire marketing messages in a third. To help marketers stay on top of the latest trends, eMarketer has curated a Roundup of our latest coverage on the subject, including statistics, insights and interviews.

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PATH-TO-PURCHASE ROUNDUP

Overview

There's no question the path to purchase has gotten complicated since the advent of retail ecommerce. Last year, eMarketer estimates, 164.6 million people in the US made at least one purchase via a digital channel. And that means a lot more than just PCs now.

Among that group of nearly 165 million, 104.8 million made a purchase from a mobile device during the same time period, including 88.3 million who made a purchase via a tablet specifically and 67.2 million who bought something via smartphone. And millions more used each of these devices to browse and research products without actually making a purchase.

Retail ecommerce sales reached \$305.65 billion in the US in 2014, with 19.0% of that figure coming from mobile devices. And even more sales than that are influenced by the digital world, whether a shopper uses a smartphone to check store hours before heading in to make an in-store purchase or a PC user shops around before doing business in person. There's even more room for multichannel behavior, with mobile users frequently switching to the desktop (or even a tablet) to complete a purchase.

Both showrooming, which sends the purchaser on a path from in-store to online, and webrooming, which does the reverse, are popular with US internet users. A Harris Interactive survey found that 58% of men and 45% of women planned to do one or the other during this past holiday season. According to LoyaltyOne, the main reasons US internet users choose to pick up online purchases in-store are to get discounts or avoid shipping costs. And new ways to shift the path to purchase continue to pop up.

Beacons are one particular area of interest, with the power to use mobile technology to get real-world shoppers to make a brick-and-mortar purchase, in real time.

An estimate from BI Intelligence in February 2015 put the expected total for US beacon-influenced retail sales at \$4.1 billion this year, a number the research firm expects to jump as high as \$44.4 billion by 2016.

US Mobile Shoppers, by Device, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Mobile shoppers (millions)	125.0	150.4	171.0	184.4	194.5	204.7	213.7
—% of digital shoppers	65.4%	75.9%	83.4%	87.3%	89.6%	92.3%	95.4%
Shoppers on smartphone (millions)	105.9	129.5	149.3	165.8	177.7	187.4	195.8
—% of smartphone users	75.0%	79.0%	82.0%	84.0%	85.0%	86.0%	87.0%
—% of mobile shoppers	84.7%	86.1%	87.3%	89.9%	91.4%	91.5%	91.6%
—% of digital shoppers	55.4%	65.3%	72.8%	78.5%	81.9%	84.5%	87.4%
Shoppers on tablet (millions)	97.6	111.6	123.2	131.4	136.6	140.8	144.9
—% of tablet users	84.0%	86.0%	89.0%	90.5%	91.0%	91.4%	92.0%
—% of mobile shoppers	78.0%	74.2%	72.1%	71.3%	70.2%	68.8%	67.8%
—% of digital shoppers	51.1%	56.3%	60.1%	62.3%	62.9%	63.5%	64.7%

Note: ages 14+; mobile device users who have used their mobile device to browse, research or compare products via web browser or mobile app during the calendar year, but have not necessarily made a purchase via mobile device

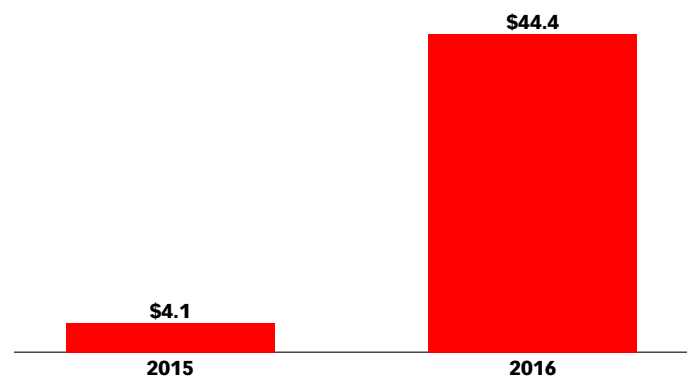
Source: eMarketer, Feb 2015

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Value of US In-Store Retail Sales Influenced by Beacon-Triggered Messages, 2015 & 2016

billions



Note: among the top 100 US retail locations
Source: BI Intelligence, "The Beacons Report," Feb 9, 2015

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Mobile Is Still for Upper-Funnel Shopping Activities

Smartphone shoppers move to a different channel to press the 'Buy' button

Mobile shopping is widespread—eMarketer estimates that more than 150 million people used a mobile device to research, browse or compare products last year, including 79.0% of smartphone users and 86.0% of tablet users. But it's still largely an upper-funnel affair, with fewer than seven in 10 of those mobile shoppers actually making a purchase on their device.

What's more, while almost eight in 10 people who shopped on a tablet also made a purchase, only around half of smartphone shoppers did the same. Though tablets are less widespread in the population than smartphones, tablet users are more likely to shop on their devices, and those shoppers are more likely to buy—and to spend. Tablets accounted for 65.8% of total US retail mcommerce sales last year, eMarketer estimates, vs. 32.0% on smartphones.

When it comes to digital buying behaviors, tablet users act more like desktop users: They tend not to actually be mobile, for one thing, but at home on the couch, with plenty of time and attention for purchase decisions. Smartphone shoppers, meanwhile, tend to focus on upper-funnel shopping activities on their devices, moving to a different channel to complete the purchase.

According to an Interactive Advertising Bureau survey from November 2014 asking smartphone owners how they planned to use their devices between Thanksgiving and the end of the year, 35% cited convenience in the upper-funnel activities of searching, researching and finding what they were looking for. That was 9 percentage points higher than the most popular lower-funnel activity, receiving mobile coupons, and 15 points higher than getting free Wi-Fi in stores (both of which could also assist in brick-and-mortar, rather than mobile, sales).

In September 2014, comScore reported findings that also support a tendency to do retail-related activities on mobile, while not necessarily buying via the channel. Two-thirds of all digital retail time spent in the US occurred on mobile, but only 11% of sales.

US Mobile Buyers as a Percent of Mobile Shoppers, by Device, 2013-2019

	2013	2014	2015	2016	2017	2018	2019
Mobile buyers % of mobile shoppers	66.2%	69.7%	71.2%	73.9%	75.7%	76.0%	76.2%
—Buyers on smartphone % of shoppers on smartphone	51.3%	51.9%	52.4%	53.0%	53.5%	53.7%	53.9%
—Buyers on tablet % of shoppers on tablet	75.0%	79.1%	80.9%	85.1%	86.8%	88.1%	88.3%

Note: ages 14+; mobile buyers are mobile device users who have used their mobile device to make at least one purchase via web browser or mobile app during the calendar year; mobile shoppers are mobile device users who have used their mobile device to browse, research or compare products via web browser or mobile app during the calendar year, but have not necessarily made a purchase via mobile device
Source: eMarketer, Feb 2015

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Most Important Factors When Holiday Shopping via Smartphone According to US Smartphone Shoppers, by Purchase Stage, Nov 2014

% of respondents

General

Getting best price/saving money

51%

Saving time

36%

Ensuring my data is secure and protected

32%

Upper funnel

Making it quick and easy to search, research, find what I'm looking for

35%

Having the ability to compare brands, products, retailers

23%

Lower funnel

Receiving mobile coupons or deals

26%

Having access to free in-store Wi-Fi

20%

Ease of inputting information

11%

Note: n=691 ages 18+ who have used/will use a smartphone to research, shop or purchase during the holiday season; respondents selected up to 3 features; only responses over 10% are shown
Source: Interactive Advertising Bureau (IAB) Mobile Marketing Center of Excellence and Precision Market Insights from Verizon, "Holiday Shopping in a Cross-Screen World" conducted by Harris Poll, Dec 15, 2014

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Apparently Shopaholics Have Discovered Apps

Retail app usage rose 174% last year

Consumers were hungry for mobile apps last year. According to Flurry data released earlier this month, overall app usage—which involves a user launching and actually using an app—grew by 76% year over year in 2014.

Retail was the star of the show last year. Lifestyle and shopping mobile app usage soared 174% on iOS (where the “lifestyle” category includes more than shopping) and Android. On Android alone, sessions in shopping apps more than tripled, with a 220% gain.

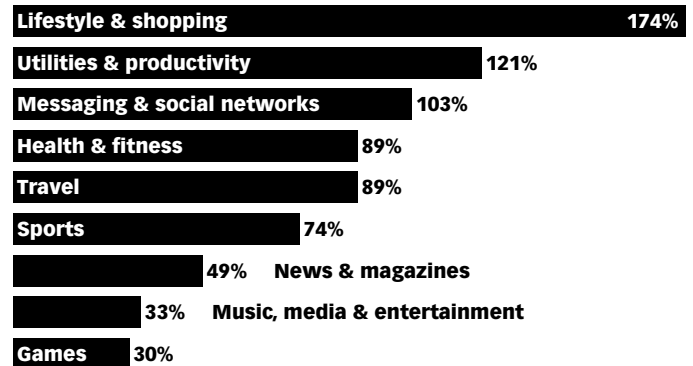
Flurry found that mobile app shopping (tracked on Android devices in the US only) was highest around 9am and noon, mostly done outside of the household. Activity during the afternoon was slower, but usage spiked again to its highest level at 8pm, with most of this taking place at home.

Despite the increase in time spent, though, there’s a bigger likelihood that those shoppers were browsing—not buying. According to October 2014 research by Visual Website Optimizer (VWO), among the 40% of US internet users who had a shopping app on their mobile phone or tablet, fewer than 40% used such apps to make purchases. But this doesn’t mean the remaining 61% weren’t buying—chances are, if they found something they liked, they headed to the store to finalize the purchase.

The global mobile app audience is expected to pass 2 billion this year, according to September 2014 estimates from 451 Research. The research firm predicted that the number of active mobile app users worldwide would rise from 1.81 billion to 2.17 billion between 2014 and 2015. By 2018, it expected this total to pass 3 billion.

Usage Growth Rate for Select Mobile App Categories Worldwide, 2014

% change vs. prior year



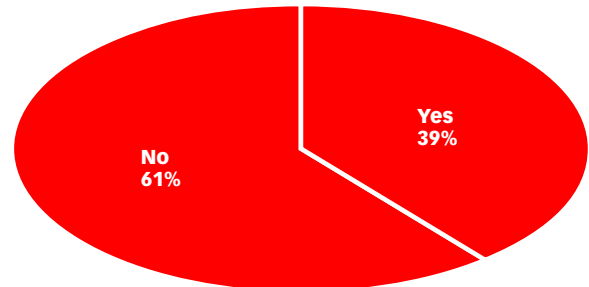
Note: represents activity on Flurry’s platform, broader industry metrics may vary; based on growth of usage sessions, defined as a user launching and using an app
Source: Flurry Analytics as cited in company blog, Jan 6, 2015

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US Mobile Shopping App Users Who Use Mobile Shopping Apps to Make Purchases, Oct 2014

% of respondents



Note: ages 18-65; among the 40% of respondents who have a shopping app on their mobile phone/tablet
Source: Visual Website Optimizer (VWO), “eCommerce Survey 2014,” Oct 10, 2014

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Offline Personalization Matters Just as Much

Marketers who personalize offline most likely to see lift in conversions

There's been plenty of talk about personalizing online communications, such as email, but recent research suggests it's equally important to tailor offline customer experiences as well.

According to September 2014 research by Econsultancy in association with RedEye, 95% client-side marketers worldwide who had implemented personalization via offline channels had seen an uplift in conversion rates. This was more than any digital channel studied, and led email—the most popular personalization channel—by 5 percentage points. Among digital channels, websites and search engine marketing (SEM) were most likely to have seen lifts in conversion due to personalization, with the latter tops across all channels for driving “major” uplift.

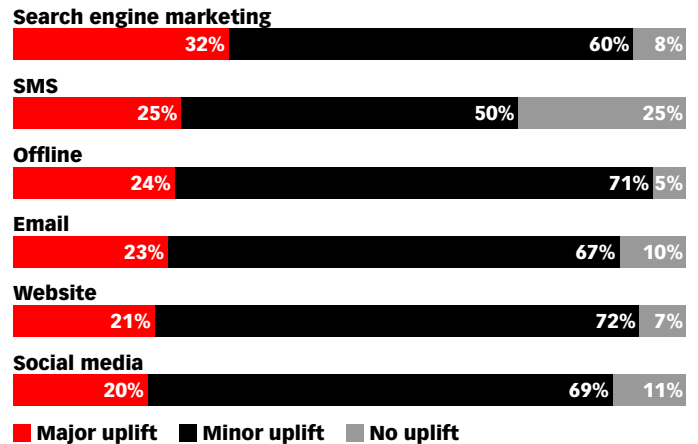
However, those polled weren't exactly focusing on the most successful channels. Just 23% of client-side marketers worldwide personalized offline channels, compared with 88% who used email personalization and 44% who did so for websites. Agency professionals were even less likely to tailor offline efforts, at just 17%. One-fifth of respondents personalized SEM—the second-lowest response for both marketers and agencies.

Econsultancy's findings are another reminder of the need for retailers to provide an omnichannel experience. While digital and mobile are no doubt part of the purchase path, most final buying decisions still happen in-store. Retailers who can tie all of the data collected on a customer stand a better chance at closing the deal.

But many face a long road ahead in doing this. In a study by Retail Systems Research for SPS Commerce, released in September 2014, just 5% of US companies believed they had made advanced progress in executing an omnichannel strategy, compared with 37% who said they were lagging.

Channels Where Client-Side Marketers Worldwide Have Experienced Uplift in Conversion Rates Since Implementing Personalization, Sep 2014

% of respondents



Note: n=238

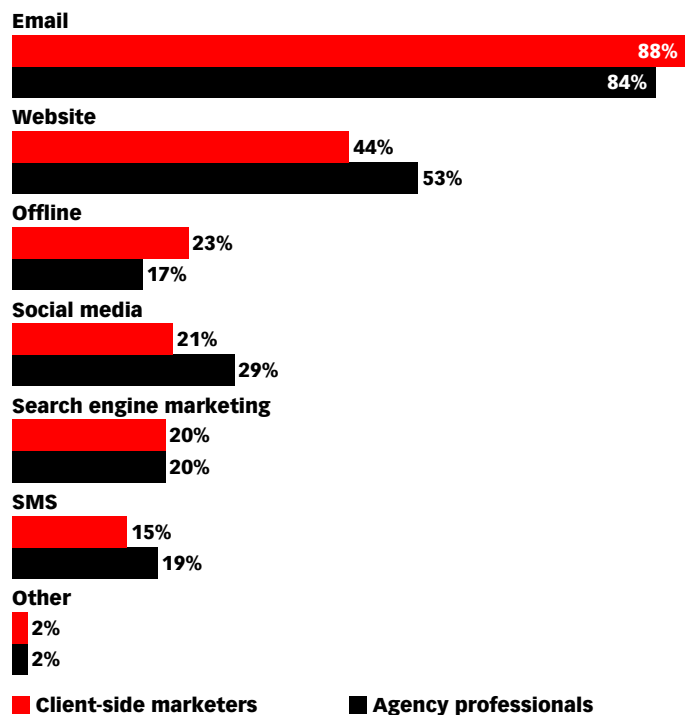
Source: Econsultancy, "Conversion Rate Optimization Report 2014" in association with RedEye as cited in company blog, Jan 5, 2014

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Channels Personalized by Client-Side Marketers and Agency Professionals Worldwide, Sep 2014

% of respondents



Note: n=280 client-side marketers; n=168 agency professionals

Source: Econsultancy, "Conversion Rate Optimization Report 2014" in association with RedEye as cited in company blog, Jan 5, 2014

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When Do Shoppers Shop Online?

Despite time spent, mobile grabs few retail dollars

A new study from Opera Software took a look into the shopping behaviors of consumers on mobile devices and desktop. The study showed that while desktop traffic to ecommerce sites peaked on Mondays, remaining stronger during weekdays than on weekends, mobile shopping spiked on Sundays.

The prevailing reason for this behavior, according to Opera, is that shoppers may research and browse on their smartphones while lazing around on the weekends and wait until the weekdays to place their orders. The study also found that the day with the lowest mobile shopping traffic was Friday.

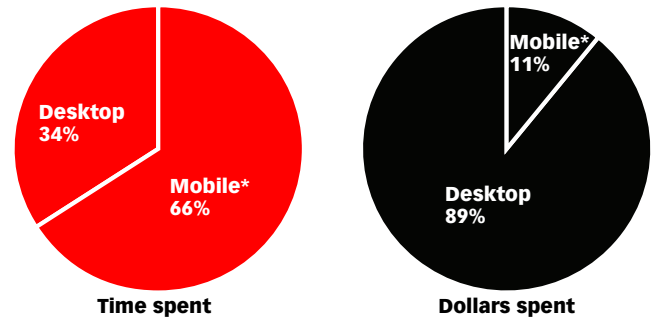
MarketLive's "Performance Index" report from earlier in 2014, which was based on Q1 2014 activity among merchants, differed slightly from Opera's findings. For tablets, specifically, traffic was highest on the weekend: Sundays captured 17% share of the weekly average, and Saturdays held 15%. But Sundays had a higher conversion rate than the others. That said, Mondays tied with Saturdays, each with a 15% portion of weekly revenues.

Smartphones showed less clear results for MarketLive. Smartphone conversion rates peaked on Sundays (0.65%), but Thursdays had the largest share of revenues, perhaps for the reasons cited by Opera.

September 2014 comScore data suggested that while mobile dominated time spent—66% of the total, vs. 34% share for desktop—89% of dollars were spent on desktop, compared with a mere 11% on mobile devices.

Mobile shopping patterns change over the course of the year, too. The Christmas season is huge in the US—as evidenced by flocks of consumers shopping on Black Friday and Cyber Monday—as well as Europe and Latin America. While those days get the most media attention, Opera found that June saw the highest global volume of traffic to mobile shopping sites.

Share of US Digital Retail Time Spent vs. Dollars Spent, by Platform, Sep 2014
% of total



Note: *includes smartphones and tablets
Source: comScore Inc., "State of the US Online Retail Economy in Q3 2014," Nov 18, 2014

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Malls Were Part of the Holiday Festivities for Young Women

The mall remains a social shopping experience for young females

Shopping malls have taken a big blow in the internet age, and according to The New York Times, over 3% of malls are considered to be dying, with 40% vacancies or higher—up from less than 1% in 2006. But when it came time for the holiday season, shoppers, especially young females, still flooded brick-and-mortar storefronts—and yes, even malls—around the country to check gifts off their lists.

In a survey of US female millennial shoppers (ages 16 to 26) by Teen Vogue, 65% of respondents said they would do the majority of their holiday shopping in-store, compared with 35% who said they would shop mostly online. In particular, these respondents enjoyed visiting malls. The main reason? They want to see and feel the products they're purchasing, cited by 75% of respondents.

But as it always has long been, going to the mall is a social shopping experience. It's not only a place to pick up an item, but also somewhere to hang out and spend the day with friends or family. For 44% of female millennials, the social aspect of shopping at the mall was the driver for why they shopped holiday gifts there: They wanted an excuse to hang out indoors with friends. In addition, just over one-third of respondents (37%) said they went shopping at malls for holiday gifts so they could spend quality time bonding with their mothers.

Because when millennial females go to the mall, there's a larger experience they get to be a part of: It's a warm place with a food court, entertainment and all of the bells and whistles that make holiday shopping cheery and delightful. Respondents said that they looked forward to their holiday shopping trips to the mall mainly because of the festive store decorations and window displays (75%), but also because of the music playing (53%)—as soon as the clock strikes midnight on Thanksgiving Day, it's all Christmas music all the time—and the chance to collect festive shopping bags decorated with snowmen, snowflakes,

Leading Locations Where US Internet Users Saw/Heard Advertising, by Income/Net Worth, Aug 2014

% of respondents

	Household income \$75K+	Household income \$250K+	Household income \$500K+	Net worth \$1+ million
TV	65%	48%	63%	60%
Facebook	48%	35%	43%	49%
In emails	43%	34%	45%	38%
Websites	43%	40%	45%	43%
In mail sent to your home	42%	39%	53%	45%
Radio	40%	35%	43%	44%
Magazines (printed or digital)	38%	41%	54%	49%
Billboards	38%	31%	37%	44%
Newspapers (printed or digital)	37%	35%	45%	50%
Magazines—printed	36%	37%	50%	47%
Newspapers—printed	33%	31%	39%	43%
Inside stores	32%	22%	24%	27%
YouTube	29%	24%	25%	27%
Gas stations	27%	26%	25%	23%
Movie theaters	25%	22%	26%	30%
Shopping malls	25%	24%	29%	27%
Smartphones	24%	20%	27%	31%
Twitter	17%	15%	13%	13%
Tablets	16%	17%	24%	19%
Medical offices	14%	14%	15%	16%

Note: in the past 30 days

Source: Shullman Research Center, "Insights into Luxury, Affluence and Wealth: Communicating with Luxury, Affluent and Wealthy Consumers in Today's Cross-Media World," Oct 30, 2014

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reindeer and the like (46%). They not only get to buy holiday gifts—they also get to buy in to the experience of celebrating winter coziness and feelings of affinity for loved ones during what some deem the most wonderful time of the year.

The best news of all for retailers is that these shopping trips, which originate so that shoppers can purchase gifts for others, result in shoppers buying something for themselves 77% of the time, the Teen Vogue survey found.

Malls Were Part of the Holiday Festivities for Young Women (continued)

For retailers, it's a very, very good thing when shoppers are still going to malls, whether they're young females or not. In a Shullman Research Center study, between 24% and 29% of US internet users with a household income of \$75,000 or higher saw or heard advertising at the mall.

For retailers staking out mall spaces for advertising and marketing campaigns, the logic goes that if you build captivating campaigns, they will come and buy. And if they are already coming and planning to buy, then seeing that advertising may pique their desires to buy more.

A Moment of Silence for the Catalog? Not Yet

Online-only retailers may benefit most from catalogs

The pendulum swings back to print for JCPenney. After phasing out its “Big Book” to focus on its online presence in 2009, the flagging retailer recently announced that it was resurrecting its catalog. The rebirth of the 120-page mailer arrives on the heels of an uptick in print catalog circulation and recent data that indicates the potential for greater online sales and higher ticket values after shoppers thumb through print catalogs.

In September 2014, Bonobos’ CEO and founder Andy Dunn told eMarketer that next to the brick-and-mortar store, the retailer’s print catalog is its best marketing material; consumers who scan the catalog’s pages often end up with higher average ticket values once they hit the “Buy” button. Dunn attributes this to the catalog’s enticing images and ways in which the products can be used by a shopper. For Bonobos, a clothing brand that gained popularity by creating men’s trousers that didn’t require a belt, the success of the catalog-to-online checkout conversion may be “because of the editorial and seeing the product in context,” Dunn said. “In a lot of ways the internet hasn’t caught up.”

However, UPS, comScore and the e-tailing group released data in June 2014 that calls into question the mass appeal of catalogs as research and purchasing tools in this day and age. While the few people who look at catalogs before purchasing may purchase more after doing so, few shoppers make use of catalogs in their path to purchase. Among US digital buyers, only 5% said they researched products from multichannel retailers through a catalog, and just 4% actually made a purchase, either by calling or ordering through the mail, once they looked at a catalog.

Perhaps then it’s for a company like Bonobos, or Everlane (an online-only apparel retailer that sent 500,000 customers catalogs over the 2014 holidays, writing, “as an online-only brand, we never imagined the day we’d make a print catalog”), where transactions take place online that benefit most from the catalog in this day and age. It’s a tactile

inspiration tool, one that elicits an emotional response for shoppers accustomed to being inundated with digital messaging in an online world. It might also be a tool that inspires loyalty in consumers: If a customer enjoyed shopping the first time around, why not jog his or her memory and encourage a second purchase?

But it seems that catalogs are luxuries enjoyed by companies with money to spare. Catalogs are costly to produce: There are printing costs, the price of alluring photo shoots, and shipping costs made more expensive by rising postage prices. Catalogs must be produced many months in advance. In an October 2014 survey by The Relevancy Group, US marketing executives from companies with over 1,000 employees used catalogs more often as an active marketing channel (23%) than medium-sized companies did (19%).

Audience and Use Cases Differ for Mobile Apps vs. Mobile Web



Lucinda Newcomb

VP, Mobile and Site Product Management

Sephora

Personal care and beauty products retailer Sephora has made strides in the mobile space over the past few years, investing in various channels and technologies, including its own mobile web and app properties. Lucinda Newcomb, Sephora's vice president of mobile and site product management, spoke with eMarketer's Rimma Kats about the company's mobile efforts and the ongoing debate about whether mobile apps are better than the mobile web.

eMarketer: What are the strengths and weakness of mobile sites and mobile apps?

Lucinda Newcomb: There are two major considerations with respect to mobile sites and mobile apps: features and discovery. The mobile web is a great way for new customers to discover your brand and is good for driving traffic from emails. A mobile site is ideal for the customer who is looking to do something while they're waiting in line or whenever they have a few minutes to fill.

Apps require effort; you have to find and download them. That audience is more engaged and loyal. Once the customer is there, an app helps a brand offer a highly engaging experience.

eMarketer: What forces drive businesses to create native mobile apps?

Newcomb: Native apps provide capabilities to reach a highly engaged audience in ways you cannot do through a mobile site. Through native apps, we can utilize notifications or build fun features by, for example, accessing the device's camera.

“While mobile sites give you breadth of reach, native app technology gives a marketer the ability to engage in a deeper way with consumers.”

While mobile sites give you breadth of reach, native app technology gives a marketer the ability to engage in a deeper way with consumers.

eMarketer: How do you decide whether to invest in both a mobile site and mobile app?

Newcomb: It's all about your audience. Do you have a highly engaged audience who will take the time to find and download your app? Are there features you can offer them in your app that they will value? If so, an app can be a good investment.

If you don't have a recognized brand with an engaged audience, it can be difficult to be discovered in the app store without a highly compelling, differentiating value proposition.

eMarketer: How do you go about setting objectives for mobile sites vs. mobile apps?

Newcomb: In both cases, we look at how much revenue is being driven by the particular platform. We also look at traffic that is pre-shopping on mobile and then purchasing on Sephora.com or in one of our stores.

eMarketer: Is it fair to compare the performance of a mobile site and mobile app?

Newcomb: They serve different audiences and different use cases, so a comparison is not useful.

eMarketer: When does it make sense to have one mobile channel—either a mobile app or mobile site—instead of both?

Newcomb: A brand should always have a mobile site; it's important for new customer acquisition. Mobile apps make sense when you have a highly engaged audience who will go the extra mile to download the app. They also make sense when there is a particular unique feature.

Because apps have the ability to send notifications and other features, it's always better if you can get your mobile traffic to the app. However, it will only happen if there is a natural inclination of your audience to be there. It's hard to force.

BMW Supports Growth of Mobile to Impact Purchase on Dealer Lot



Kevin Philips

Manager, Retail & Experiential Marketing

BMW

Car shoppers are spending more time researching online and spending less time on the dealer lot. Kevin Philips, manager of retail and experiential marketing for BMW, spoke with eMarketer's Danielle Drolet about the impact of digital channels on the path to purchase and how one concise message can exist across all three tiers.

eMarketer: How do you successfully boost brand continuity across platforms and tiers?

Kevin Philips: We have a very strong brand image and make sure our corporate identity is visible through all three tiers, through Tier 1 in our national branding ads, through Tier 2 in our dealer advertising groups and then filtered down at the dealer level. Whatever message is out there, it's one consistent look and feel at all levels.

We accomplish that through many communications with our dealerships, whether it be monthly marketing meetings with the marketing co-op groups, through digital communications, emails, text or Twitter alerts of whatever the latest and greatest is.

eMarketer: Do you see the dealer lot as becoming a more important area for marketing with the emergence of mobile?

Philips: There's an interesting trend where it used to be when somebody was shopping for a vehicle, they'd probably go to five or six dealerships to test drive vehicles, compare vehicles to make their final decision. But that has dropped to about 1.6. Basically that's one time that the customer steps onto a dealer lot for a vehicle.

"Since we went from having five shots of a consumer walking on a dealer's lot down to one, the majority of the transaction now is online-based."

The shopper has done all their research at home or online before they go to that lot. We want to make sure that when they're on that lot making that final decision, probably with their smartphone in hand, that they have access to the information they need to make their final, educated decision.

eMarketer: How do you communicate this to dealers?

Philips: We launched a new campaign earlier this year to work on in-dealership BDLCs, which are business development centers focused on consumers, prospects and loyal consumers. Since we went from having five shots of a consumer walking on a dealer's lot down to one, the majority of the transaction now is online-based.

We want to make sure that the dealerships are up to speed and trained to have this full negotiation, interaction and information exchange digitally so when the consumer does finally walk in that one time, it's a seamless transaction.

eMarketer: PC takes the digital cake for time spent accessing content and research for auto, while mobile wins in most other industries. Why?

Philips: More needs to be pushed to the mobile end. Although currently about 38% of research is done on a mobile device, it will continue to grow. We need to make sure that we provide support to that growth, so that it will eventually outweigh the PC in terms of the interaction.

Cars are a consumer product. And it's important to know how consumers shop for things now, as well as what they expect when they go to a mobile site. They're looking for a one-click way to get information. So, make sure what they're looking for is front and center. Don't have them dig for it, because you'll lose them.

eMarketer: What are some best practices for communicating digital marketing strategies and tactics to the dealer level?

Philips: It's about talking to our wide dealership network. We could have a dealer meeting and be speaking to the owners and center operators. We could have a marketing meeting and be speaking to the general managers and sales managers. We make sure that on all those levels, you have the right message, and the right communication to deliver it, so that Tier 1 through Tier 3 has a consistent message.



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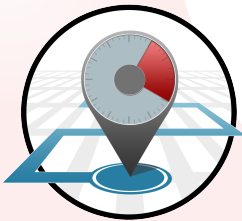
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