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Spring 2010 Edition

DIGITAL MARKETING FACTBOOK

A comprehensive compilation of trends, data, charts and facts
from Internet marketing's most trusted sources.



Welcome to the *Digital Marketing* Factbook

The Web continues to evolve from a one-way communications medium to a two-way conversational medium, giving consumers greater control and increasing marketing complexity. Not only can individual and business buyers easily research all available choices from suppliers and vendors, but they can also dialogue with experts and other consumers. They can easily ignore irrelevant marketing communications and turn their attention elsewhere instantaneously. And they ultimately make the purchase decisions that give them the best solutions to their problems—and the best user experiences.

Consequently, to influence purchase behavior of individuals and businesses, we marketers must keep abreast of how our customers and prospects use new and rapidly changing forms of digital communications. To be effective, it is critical to have up-to-date information about where our customers are on the Web, what will get their attention, and, in the end, what drives their buying decisions. In order to develop our marketing plans and implement go-to-market tactics, we must stay current on rapidly changing benchmarks, metrics, and trends in the customers' use of interactive media.

To assist business-to-consumer and business-to-business marketers with this fundamental need, MarketingProfs has published this second edition of our Digital Marketing Factbook. The collection includes significant updates on email, search, and social media, as well as two new sections covering e-commerce and mobile marketing. We recognize that research and data are widely available, but it is a formidable challenge to identify and select reliable and accurate sources. To save you time and money, we created this compendium as a concise compilation of data covering the critical topics of digital marketing, and we put all its contents through our rigorous test of reliability. Most organizations do not have staff with the time and the skills required to create a data resource like this. Our expert Director of Research, Tim McAtee, and his experienced staff have created this volume to help you sharpen your marketing plans and make business cases for your recommendations to management. It is our hope that you will make it one of your most valuable marketing management resources.

Roy Young
President
MarketingProfs



A letter from our Director of Research

With big budgets and careers constantly at stake, every marketer needs solid, up-to-date information in order to make informed and intelligent decisions. In this second edition of the MarketingProfs Digital Marketing Factbook, we offer the newest and most relevant data our marketing analysts could find.

While the Web is overflowing with marketing statistics, it is difficult for even experienced marketers to immediately tell the difference between a convenient statistic that will eventually collapse under the strain of scrutiny and a well-researched, mathematically valid statistic. Statistics is not an exact science, but a mathematical language indicating how likely an isolated observation is to hold true in other cases. Generally speaking, the more rigorous the research is, the more likely that statistic is to hold up in the real world. With that in mind, researchers at MarketingProfs are constantly seeking out, evaluating, and selecting data that is sound and reliable for this publication. This handbook is the result of this ongoing effort to separate the best statistics from the rest.

In the pages that follow, we present an unbiased, well-rounded set of statistics, all culled from the best sources available, and all strong enough to stand up to our expert scrutiny. Marketers may disagree on the answers to some of the questions covered in this book, and in these cases we have done our best to present the case of all sides fairly.

Each chapter covers a specific marketing topic. We wrote each chapter in a way that just about anyone can quickly feel like they are up-to-speed on that topic without being overloaded with data, yet even experts will still find compelling information. We strive to provide you with a tool for teaching as well as one of the most complete and easy-to-use statistical reference books available to digital marketers.

Whether you happen to be in need of information on the newest marketing tactics, or simply want to know how the underlying usage of widespread technology is changing, chances are good that you will find what you're looking for within the pages of the factbook. If you don't find what you need, or if you have questions about the data included, please tell us by emailing your questions to research@marketingprofs.com.



If your organization would like to contribute data to the Factbook please email your suggestions to us as well. Because this is a constantly evolving, living document, we are always looking for the freshest and most authoritative data for inclusion in future updates.

The research team at MarketingProfs thanks you for your trust and support.

Tim McAtee
Director of Research
MarketingProfs



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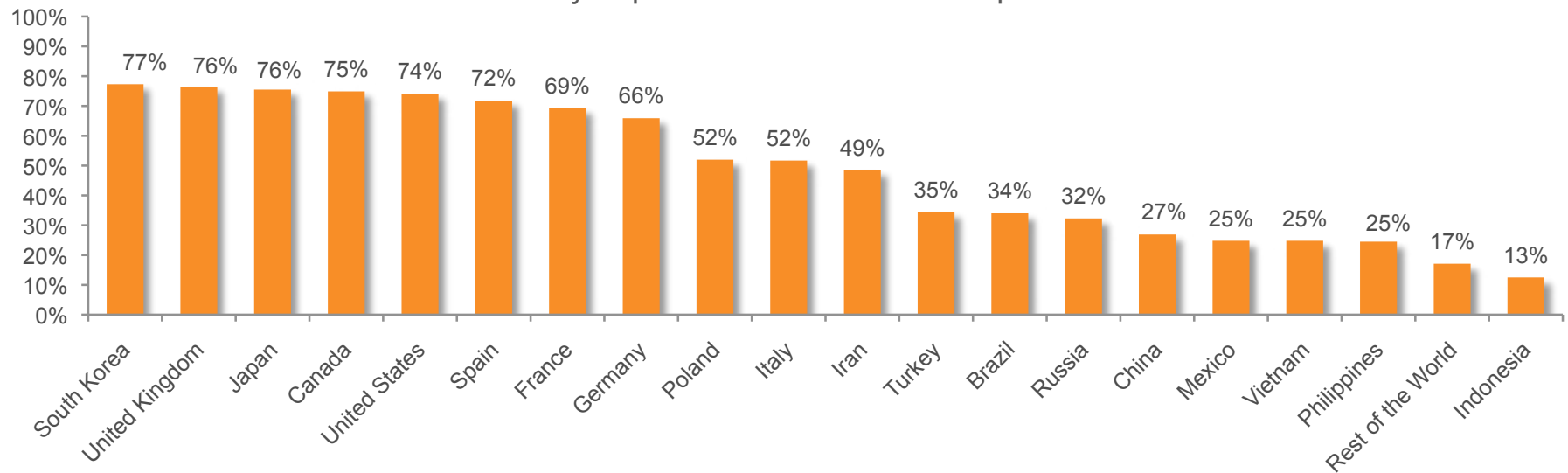
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Which is the most wired country (highest percent penetration) of the largest population countries in the world? The United States trails South Korea (77% penetration), the United Kingdom (76%), Japan (75%), and Canada (74%), according to Internet World Stats.

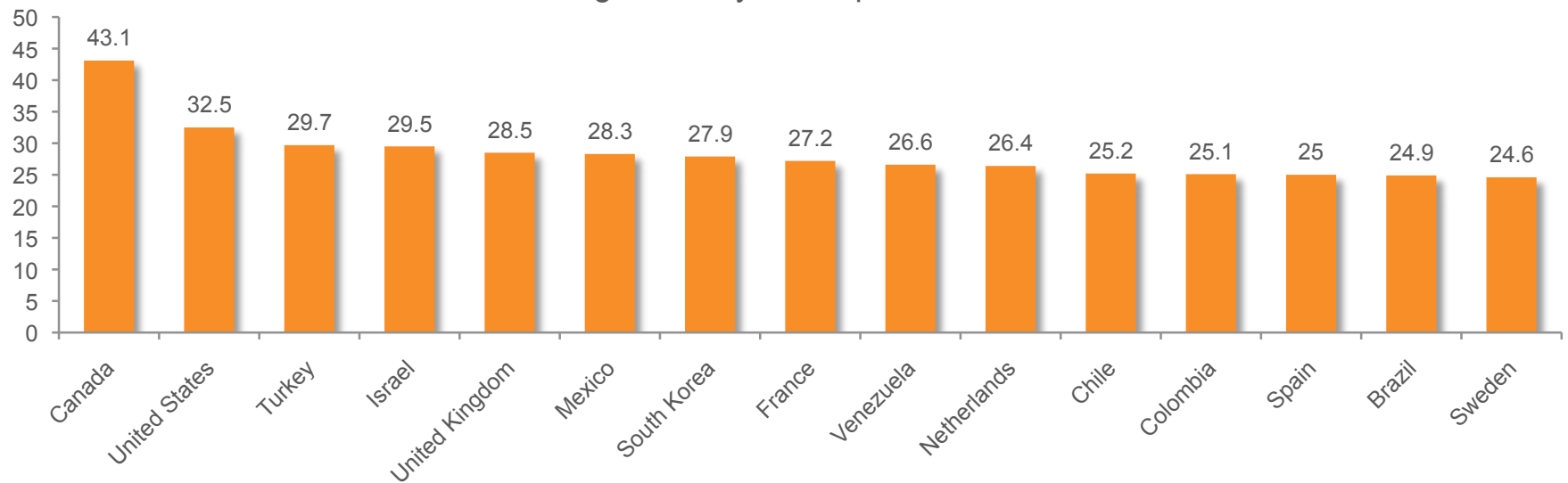
% Penetration by Population Ranked by Top 20 Countries in Total Population



Source: Internet World Stats, September 2009

Who spends the most time online? Canada outpaces the United States by spending nearly nine more hours per month (43.1 compared to 32.5). Turks are also keen online users, slightly behind Americans at 29.7 hours per month, according to comScore.

Online Engagement by Country Average Monthly Hours per Visitor

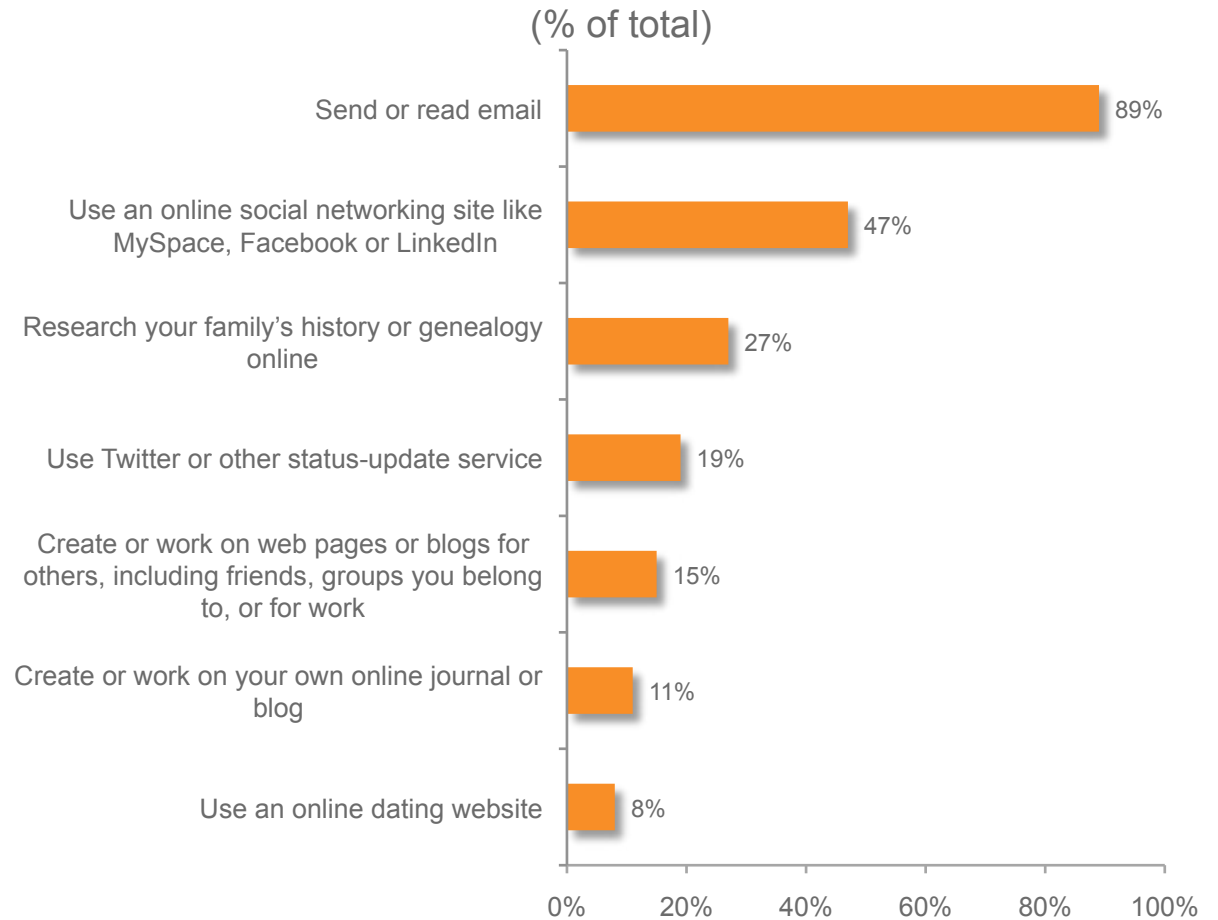


Source: comScore Media Metrix,
Methodology: Global online panel, July 2009



The Pew Research Center is the foremost source for how the Internet is changing life in the United States and access to information. The center continually polls consumers through a study called the Internet & American Life Project. The September 2009 edition showed that email usage was still the most popular online activity. However, people in the United States are involved online in a whole range of social-related activities: 47% said they used a social networking site, 27% are researching their family or genealogy, 19% are tweeting, 15% are contributing to blogs while 11% maintain their own. And 8% of Americans are looking into doing more physical social networking, since they are accessing dating websites.

Adults Online Reported Activities



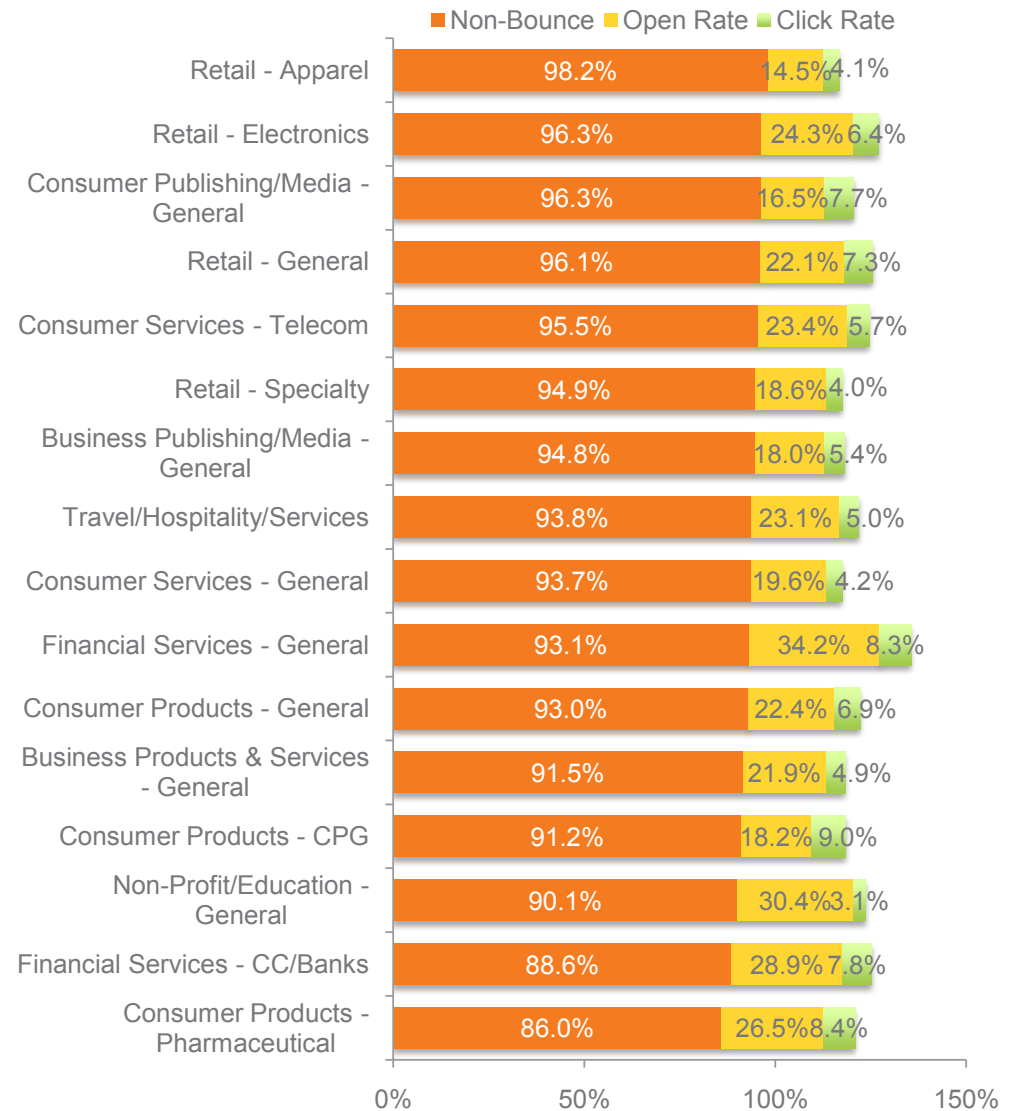
Source: The Pew Research Center's Internet & American Life Project
Methodology: Telephone poll of 1,698 US consumers, September 2009





Certain industries enjoy exceptional performance from their email marketing. This chart shows non-bounce, open rates, and click rates by industry during the third quarter of 2009. Financial services companies had the highest open rates at 34.2%. Retailers in the apparel category experienced the lowest at just 14.5%. The click rates in all industries ranged from a low of just 3.1% for non-profit and education to a high of 9% for consumer product companies. Marketers should look at the relationship between their open and click metrics. Rising open rates with declining click-through rates could be sign that your opens are not real (meaning an open is being recorded in the preview pane of your email reader). Similarly, increasing click rates without a corresponding rise in open rates could be an indicator that a segment of your file is particularly active. The key to long-term email success is maintaining a strong ratio between open and click rates.

Email Performance by Industry

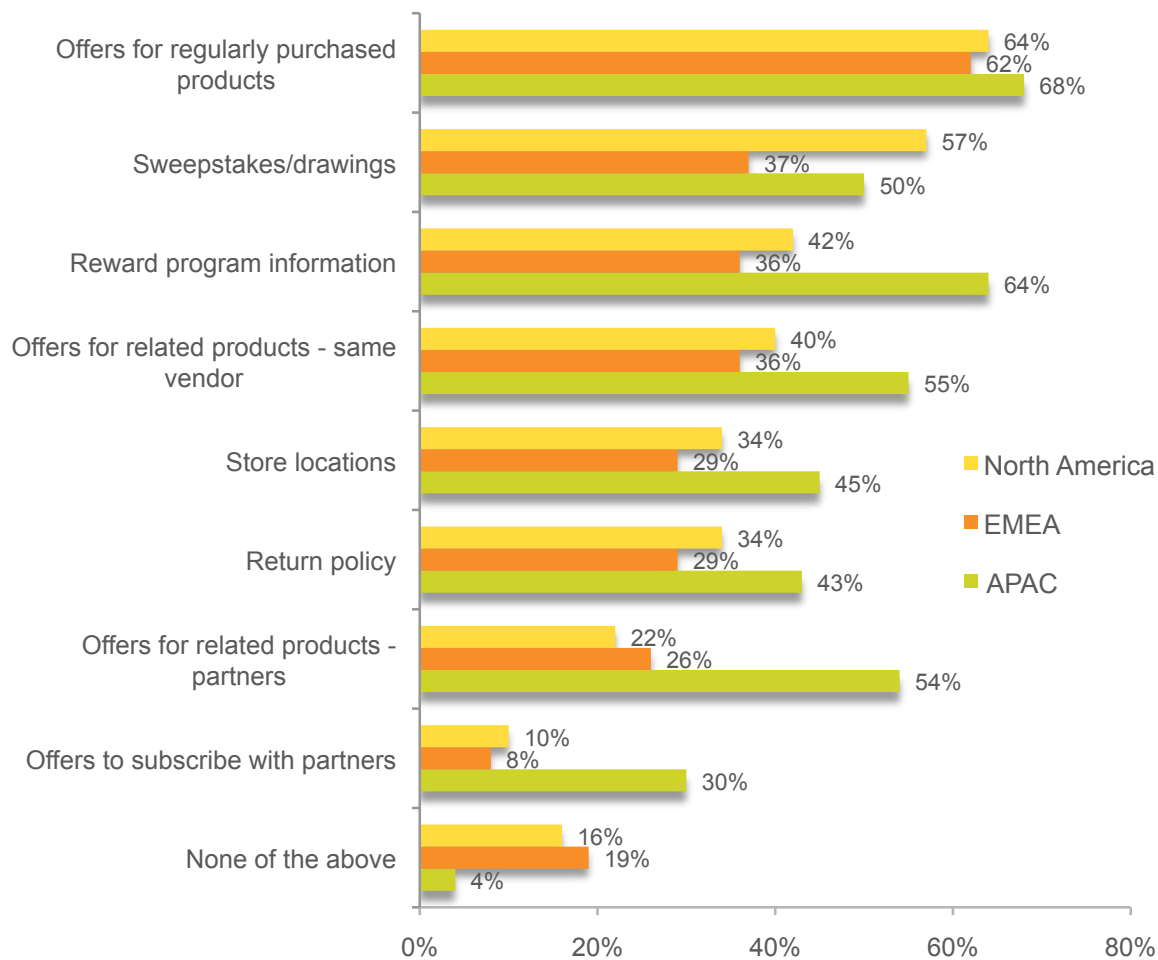


Source: Epsilon Email Benchmark Report, Q3 2009
 Methodology: A study compiled from 6 billion emails sent by Epsilon in Q3 (June-September) 2009, across multiple industries and more than 200 clients.
 As of Q407, data represents all DREAM and DREAMmail clients
 Deliverability data as reported by Return Path



This chart presents consumer preferences for types of content included in permission-based email communications. The top choices include offers for regularly purchased products, promotions for sweepstakes, and reward program information. Note that consumers in Asia are far more open to receiving offers from partners, with 54% reporting this preference versus just 22% and 26% for North America and Europe.

Desired Content in Permission-Based Email



Source: Epsilon Global Consumer Email Study, 2009

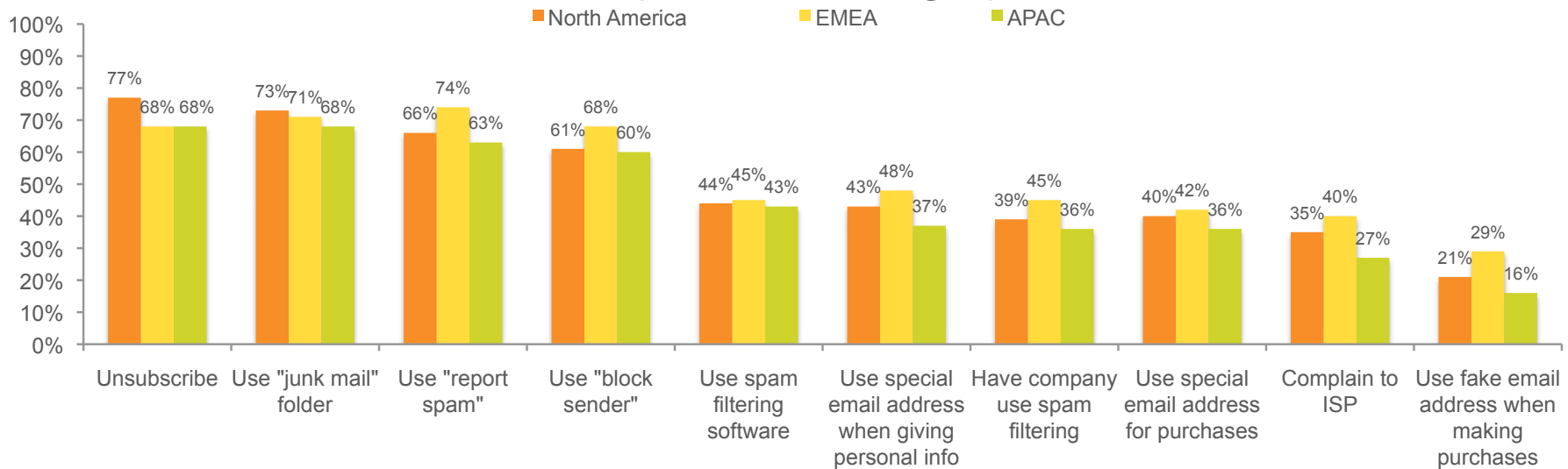
Methodology: The survey compiles data from 4084 consumers in 13 countries: United States, Canada, China, Singapore, Hong Kong, Australia, India, Malaysia, Japan, UK, France, Germany and Spain.

Chart Base: All respondents: North America (N=642), EMEA (N=1221), APAC (N=2221)



Just as perceptions of spam are varied, so are the techniques consumers use to limit inbox clutter. Large numbers of consumer (77% in North America) simply unsubscribe. Another significant percentage uses the “report spam” or “block sender” option available in most email readers. Significant numbers of consumers use special email addresses for making purchases.

Techniques for Limiting Spam



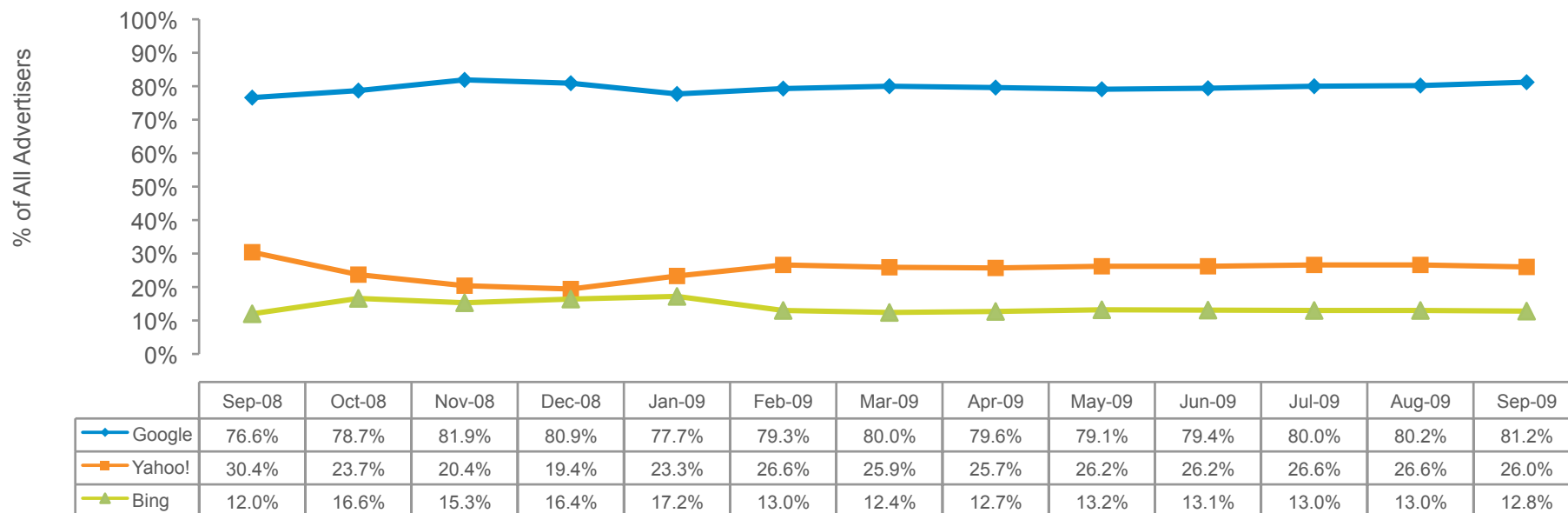
Source: Epsilon Global Consumer Email Study, 2009

Methodology: The survey compiles data from 4084 consumers in 13 countries: United States, Canada, China, Singapore, Hong Kong, Australia, India, Malaysia, Japan, UK, France, Germany and Spain.

Chart Base: All respondents: North America (N=642), EMEA (N=1221), APAC (N=2221)

Google enjoys the greatest share of advertisers by a large margin. In September 2009 81% of advertisers spent on Google while only 26% spent with Yahoo! and just 13% with Microsoft Bing. Notice that in most months, the share adds up to 119%, which means that at least 20% of advertisers are using all three engines. It's likely that these are the largest search spenders with massive budgets. And, about 20% of advertisers are spending on Bing or Yahoo! but not on Google.

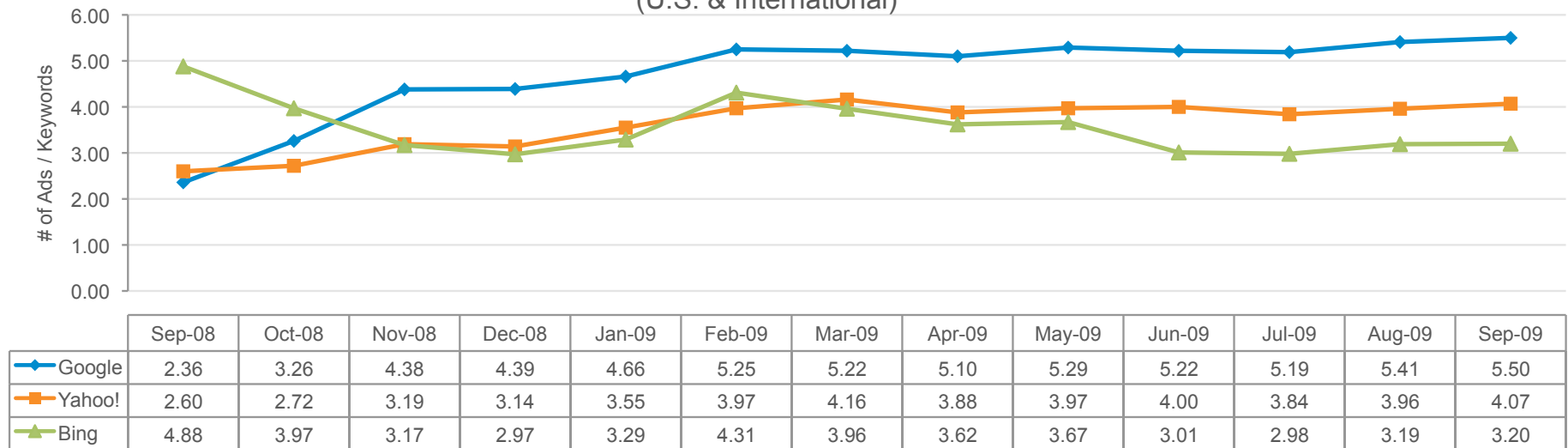
Share of Advertisers by Search Engine (U.S. and International)



Source: Adgooroo
Methodology: Adgooroo SEM Insight bid monitoring data

Looking at the average number of ads by keyword across the top three search engines offers an idea of how much competition for a keyword is normal. Google has a higher number of advertisers bidding on each keyword, which in turn will increase average bid costs.

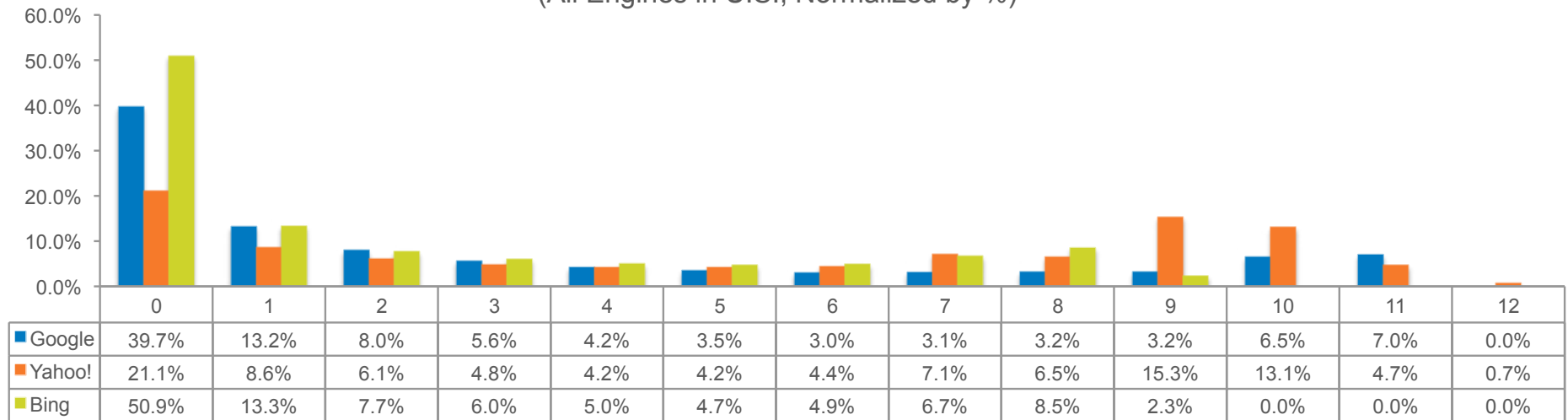
Average Number of Ads per Keyword (U.S. & International)



Source: Adgooroo
Methodology: Adgooroo SEM Insight bid monitoring data

According to this data from Adgooroo, Google shows no ads on 40% of all of their searches, Yahoo! is ad-free for 21% of all searches, and Bing displays search results without any PPC ads 51% of the time. In other words, all the major engines have a lot of unsold inventory.

Average Number of Ads Displayed Per Impression (All Engines in U.S., Normalized by %)



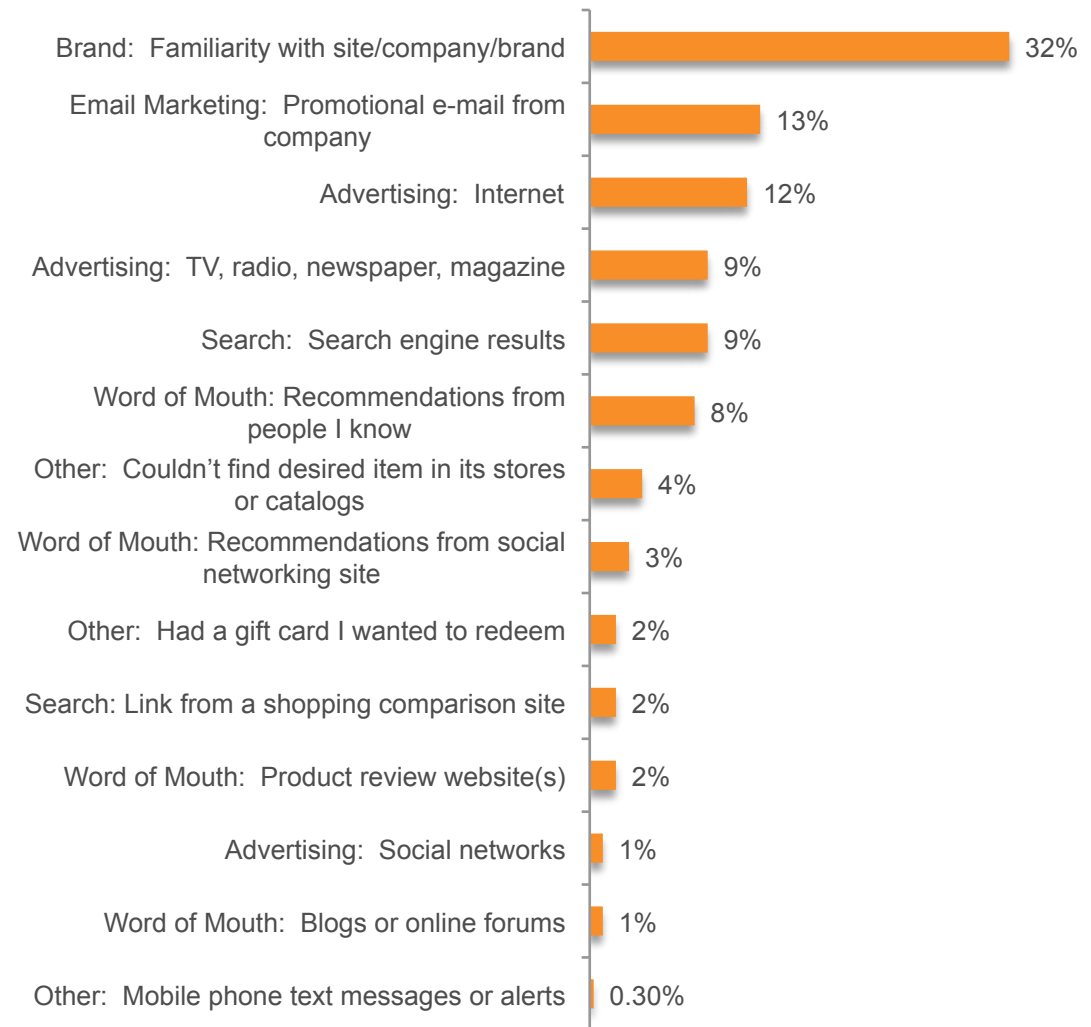
Source: Adgooroo
Methodology: Adgooroo SEM Insight bid monitoring data



In this survey by ForeSee Results, “Brand—Familiarity With a Site/Company/Brand” was the top result when people were asked why they visited a website. These same respondents also ranked as the group most satisfied with their visit and those most likely to return to the site and make a purchase from the retailer either offline or online. While many online retailers put all their energy into direct marketing and search marketing tactics, building your brand is a tactic that may work even better for driving sales. This chart also shows what a huge hurdle competitors with e-tailers like Amazon and Walmart have to overcome.

Attracting Website Visitors

Q: What most influenced your decision to visit the site?



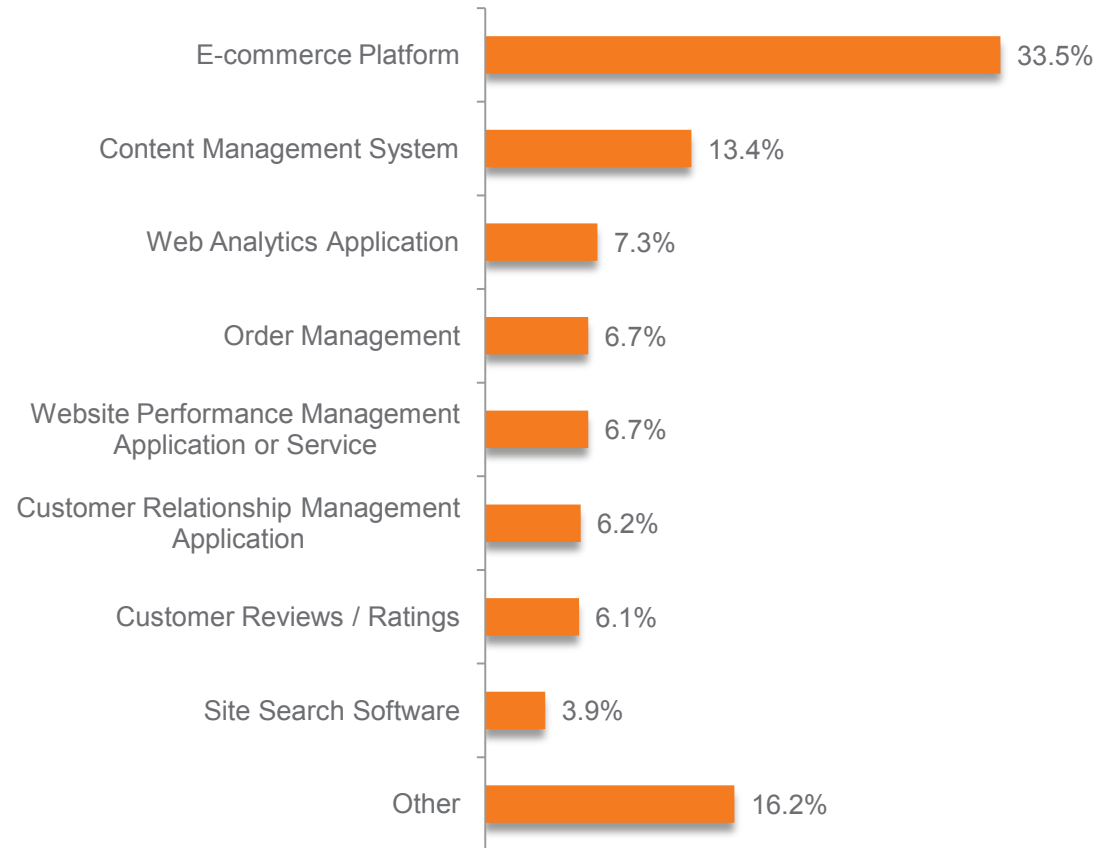
Source: ForeSee Results, 'Online Customer Acquisition: Quality Trumps Quantity' (Oct 7, 2009)
Methodology: Research collected as part of Foresee Result's annual Top 100 Online Retail Satisfaction Index, in which 23,000 online shoppers were asked what most influenced their visit to a retail website.



The top e-commerce application priority for 2010 is the backbone of the e-commerce endeavor, the e-commerce platform itself. New technology incorporating SEO meta-data and social media sharing automatically has made existing systems obsolete or uncompetitive, forcing e-tailers to upgrade. In recent years, retailers have enjoyed a greater number of choices in e-commerce platform technologies and lower upfront costs when implementing such platforms.

eCommerce Applications - Future Plans

Q: What is your top e-commerce application priority this year?



Source: Internet Retailer, 'Internet Retailer Survey: E-retailers are ready to buy new technology, and they have long shopping lists', November 2009

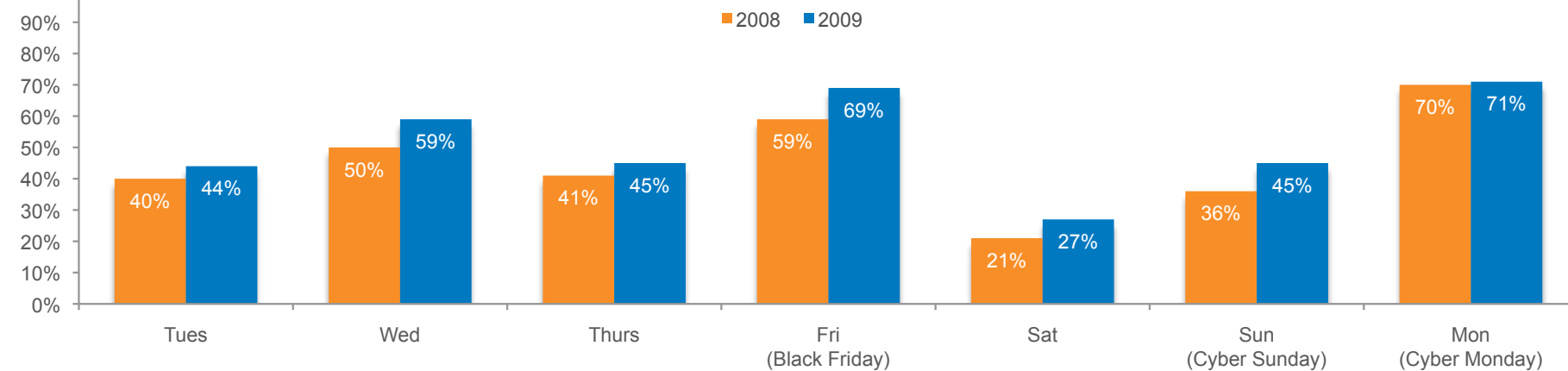
Methodology: The Internet Retailer survey audience consisted of 192 chain retailers, catalog companies, consumer brand manufacturers and web-only merchants.

The emphasis on email marketing during the holiday season was stronger than ever in 2009, with volume records being broken on multiple counts. Chad White, who tracks activity at his Retail Email Blog, described the 2009 activity: “On Black Friday, 69% of major online retailers sent at least one promotional email, up from 59% in 2008, as tracked by the Retail Email Blog. On Cyber Monday, 71% sent at least one promotional email, making it both the most popular retail email day of this year and also the most popular of all time. Last year, 70% of retailers sent email on Cyber Monday. And on Cyber Sunday, 45% of retailers sent at least one promotional email, up from 36% last year. That made Nov. 29 the biggest Sunday ever for retail email marketing.”

2009 Retail Email Participation Rate

Black Friday, Cyber Sunday & Cyber Monday

% of major online retailers sending at least one promotional email

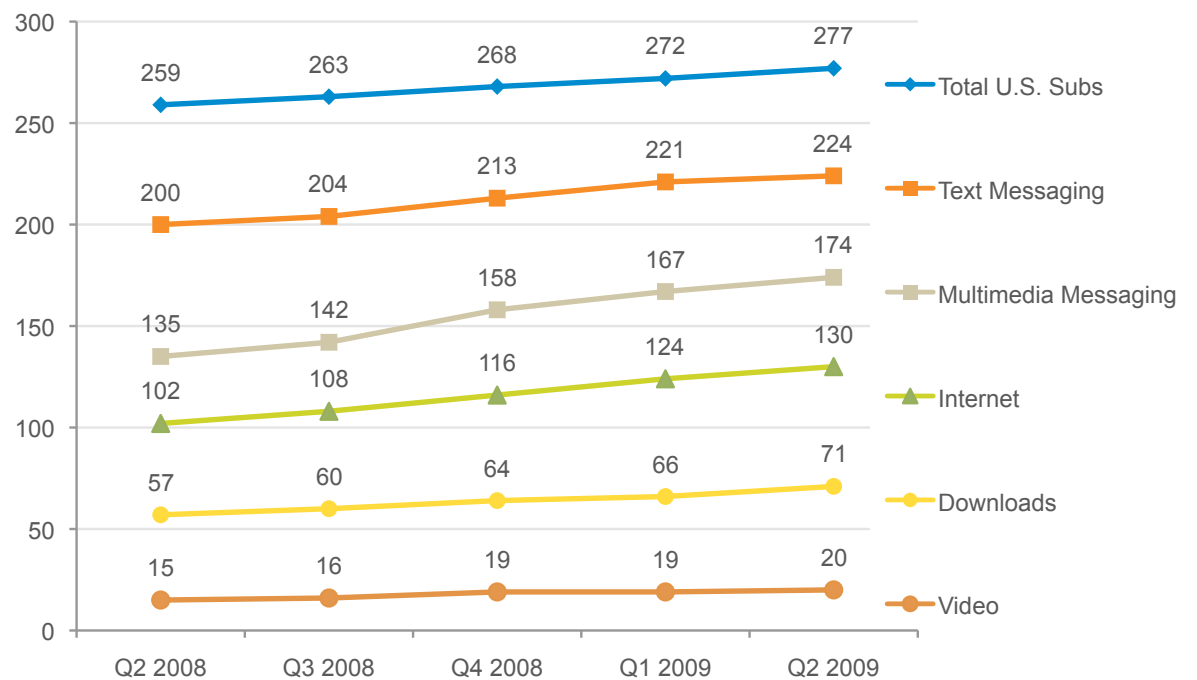


Source: Smith Harmon, 'Black Friday and Cyber Monday Set Retail Email Volume Records', December 2009
Methodology: As tracked by the Retail Email Blog, www.retailemailblog.com



Nielsen breaks down cell phone usage into component parts of talking, texting, MMS (which includes the ability to send images like phone-snapped photos), and downloading (apps including ringtones and games). By Q2 2009, 277 million people in the United States were mobile subscribers. Of those, 224 million had text capabilities, 71 million were able to download software and apps onto their phones, and 20 million could even watch video from their phones.

Mobile Subscribers by Activity Type (in millions)



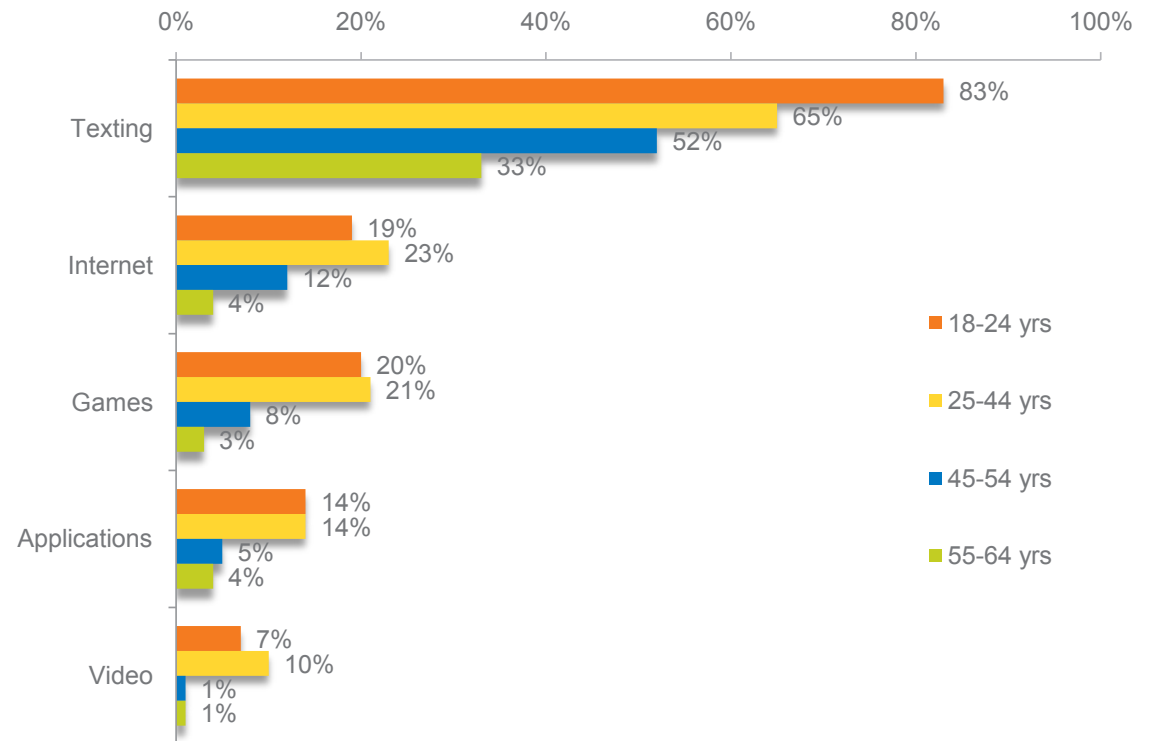
Source: Nielsen Mobile
Methodology: Panel of over 60,000 mobile subscribers



Your age also helps define what you do on the phone. In its Digital Consumer Portrait, Insight Express shows just how much more likely teens are than any other age group to text (this was the year that “sexting” teens made the news). But the older folks are also thumb-tapping their way to their friends: 52% of the 45–54 year olds were texting. The 25–44 year-old group was the most likely to use the mobile web. App usage was equal in the 12–24 and the 35–44 age group. These groups are also equally likely to be playing games on their phone.

U.S. Usage of Mobile Features by Age Group

% Who Use a Feature in an Average Week, June 2009



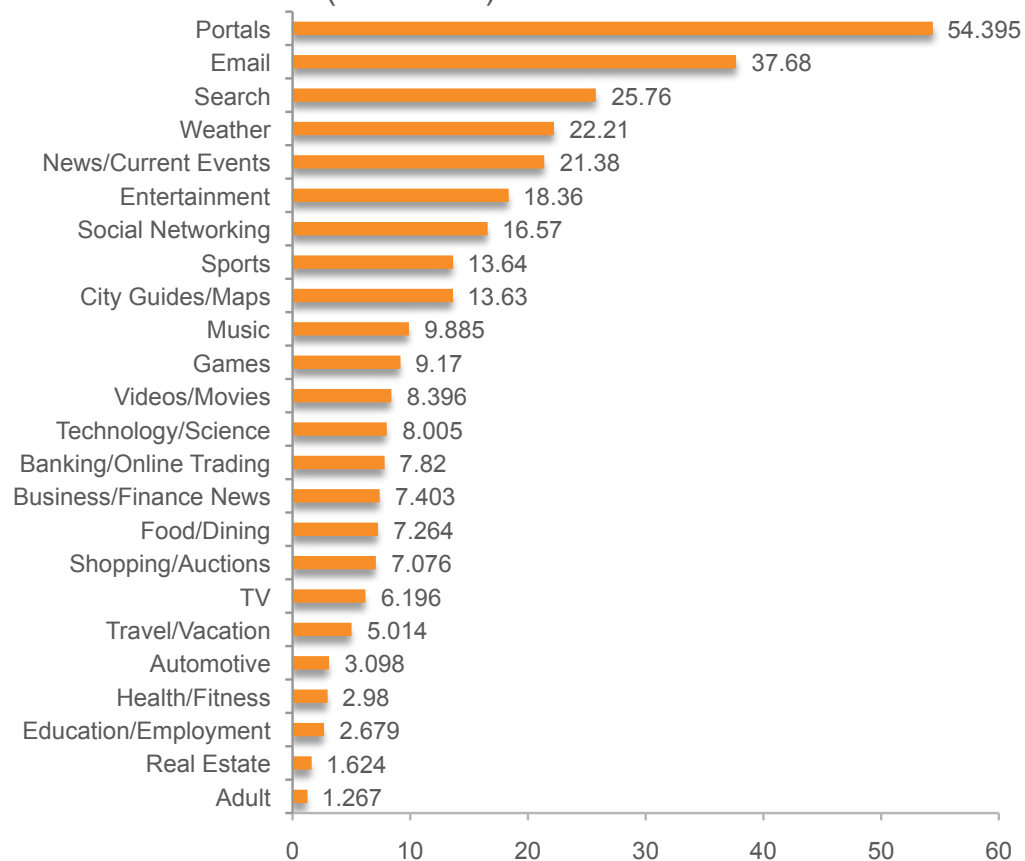
Source: Insight Express, Digital Consumer Portrait
Methodology: Online survey of 1,210 individuals that reflect a representative sample of the online US population, September 2009



Though web surfing is still a relatively small piece of what is done on multifunctional phones, what do people do when using their mobile browsers? It turns out it's not that much different than on the fixed Internet. Portals generate the largest audiences (54 million unique users in June, 2009 according to Nielsen); search is used by 25 million unique users. The other top categories relate to on-the-go enhanced activities: entertainment, weather, and sports. Adult entertainment scored lowest on this list.

Mobile Internet Users by Mobile Content/Service Type

(in millions) June 2009



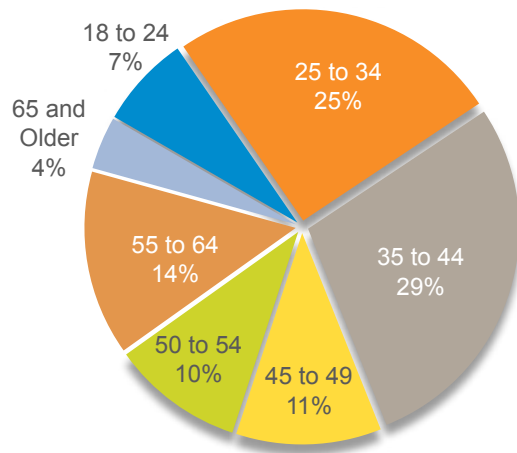
Source: The Nielsen Company
Methodology: Panel of over 60,000 mobile subscribers
Base: All U.S. Subscribers



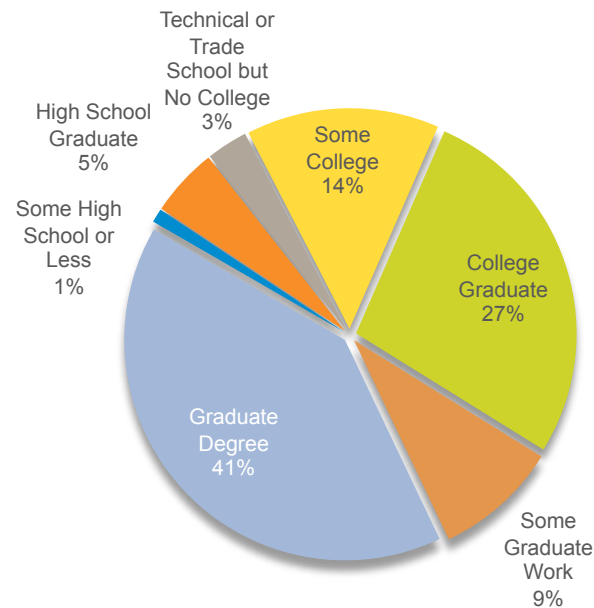


Who blogs? The press has well-documented the activity among stay-at-home moms, but as this study from Technorati of nearly 3,000 U.S. bloggers shows, bloggers as a whole are more likely to be male (67/33 male/female skew). And 54% of them fall in the 25–44 age range. They are a highly educated lot. 41% of those surveyed had a graduate degree.

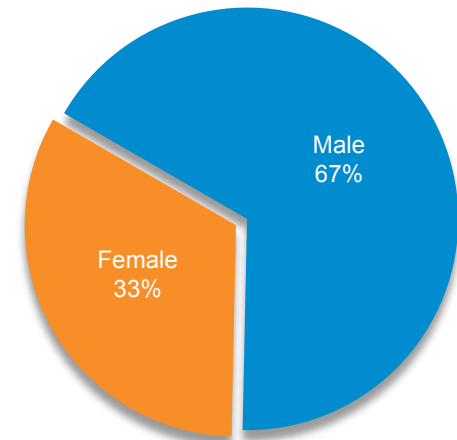
Bloggers by Age



Bloggers by Education



Bloggers by Sex



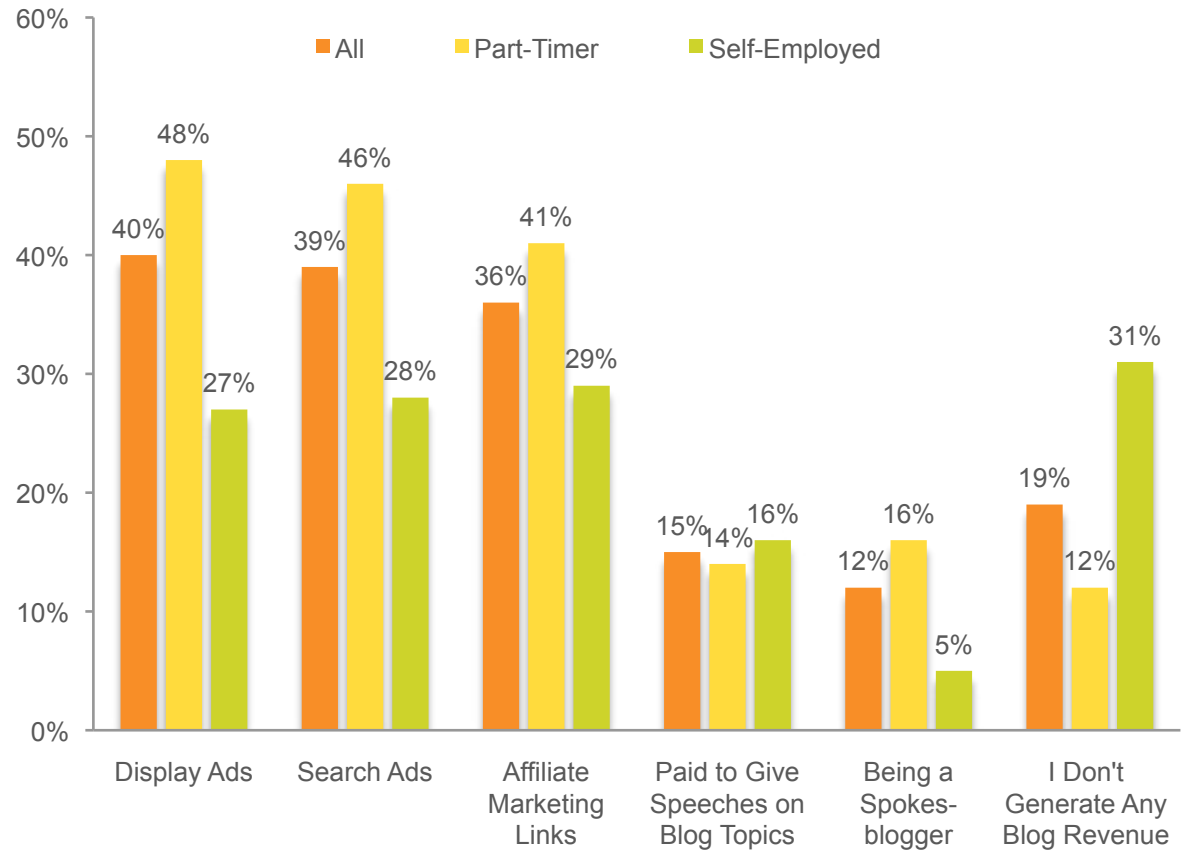
Source: Technorati.com State of the Blogosphere
Methodology: Online survey of 2,828 US bloggers, September 2009



Do people actually make money from blogs? In addition to well-documented cases like books that come out of blogs (Julie & Julia and Stuff White People Like), revenue is being generated. The most likely source is from display ads placed on the sites or affiliate marketing links where the blog gets a referral fee. This data comes from a Technorati survey of nearly 3,000 US bloggers.

Revenue from Blogging

Q: How do you generate revenue from your blog?

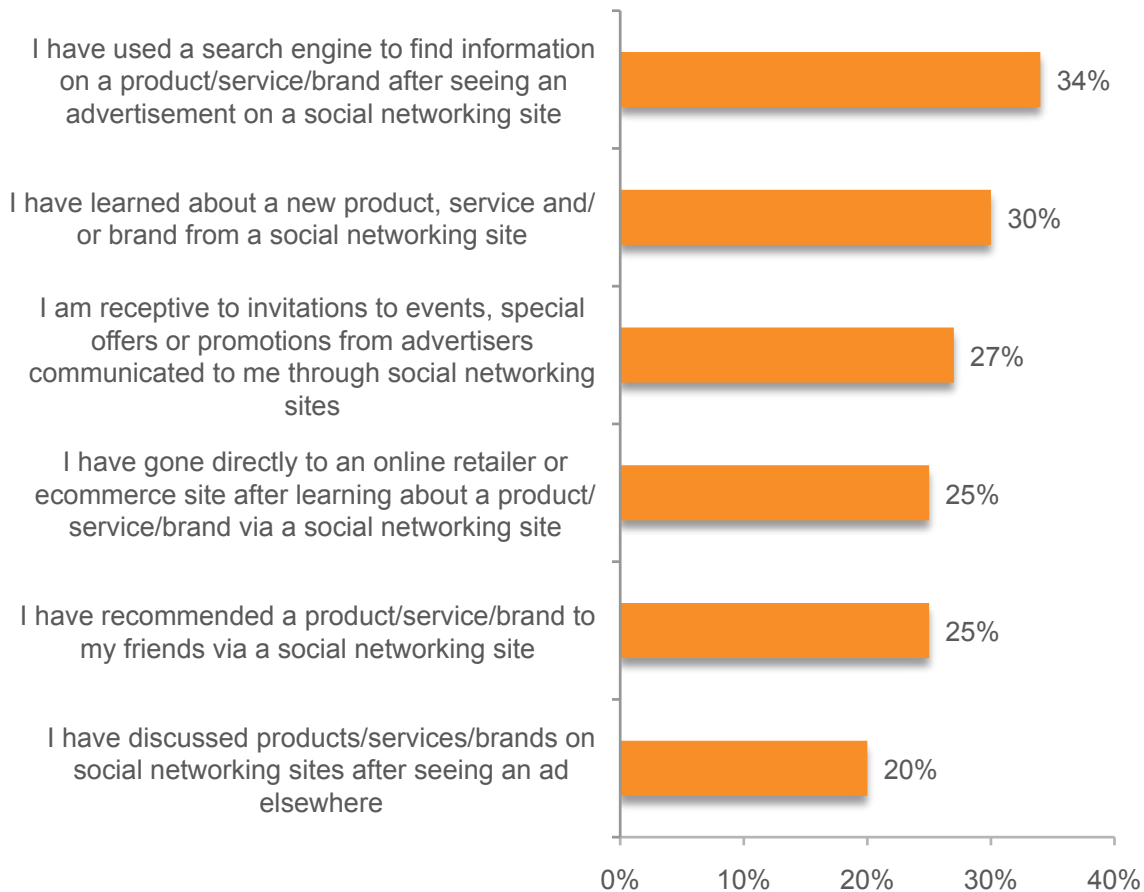


Source: Technorati, State of the Blogosphere
Methodology: Online survey of 2,828 US bloggers, September 2009



Performics is a Publicis-owned company that focuses on digital marketing optimization including assessments of how consumers talk about brands on the social web. It conducted an online survey of U.S. consumers who access at least one social network regularly and determined what kind of impact social networking has on the purchase process. 34% of social networkers had taken action on an ad they had seen on a social networking site by doing a further search on the product, while 30% had learned about a new product while on a social networking site. One quarter of respondents were making product recommendations while social networking.

Use of Social Networking in Purchase Process



Source: Performics, The Impact of Social Media
Methodology: Online survey of 3,011 who access at least one social network regularly





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