MarketingSherpa

EXCERPT

2009
Ecommerce Benchmark Report

Data for Ecommerce Marketers: 180 Charts & Tables

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Practical Case Studies & Know-How
Marketing**Sherpa**

MarketingSherpa's 2009 Ecommerce Benchmark Report

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Director's Note

Welcome to the 2009 edition of MarketingSherpa's Ecommerce Benchmark Report. It's been two years since the last edition, and it's an understatement to say that much has changed. These challenging times inspired us to examine areas of marketing where information and best practices could drive new sales, attract new customers and quickly build brand. The goal of this book is to provide practical benchmarks and guidelines to help you:

- Raise shopper-to-buyer conversions
- Lower shopping-cart abandonment rates
- Budget for tactics that are working for your type of ecommerce business
- Identify new initiatives in search, email or social media to move the needle
- Measure success and evaluate opportunity with nearly 1,500 of your peers

As you work with the 180 charts, tables and graphs in this report, we hope you will benefit from these highlights:

#1. Information and collective wisdom from 1,481 ecommerce marketers

Ecommerce marketers of every kind responded to our April survey, which may be the largest of its kind. This logic-driven tool allowed us to optimize the kinds of information we received from each respondent as we tried to explore their individual areas of expertise.

#2. Benchmark data through multiple lenses

Throughout this Report, we've broken responses into at least four major groups; those selling products vs. services and targeting consumers vs. businesses. In many areas, we've isolated the data in other ways, such as company size or organizational attitudes.

#3. Lessons of the "Highly Knowledgeable"

In online sales & marketing, knowledge is power. Some organizations are further along in implementing advanced web analytics and marketing automation…and we've separated out their responses to discover what's important to learn from their experience.

We hope this Report arms you for the year ahead, which promises to be just as interesting as the year behind us. Whenever you find yourself wishing for a piece of data or an exploration of a best practice, let us know by emailing us at Research (at) MarketingSherpa (dot) com. We want you in the driver's seat.

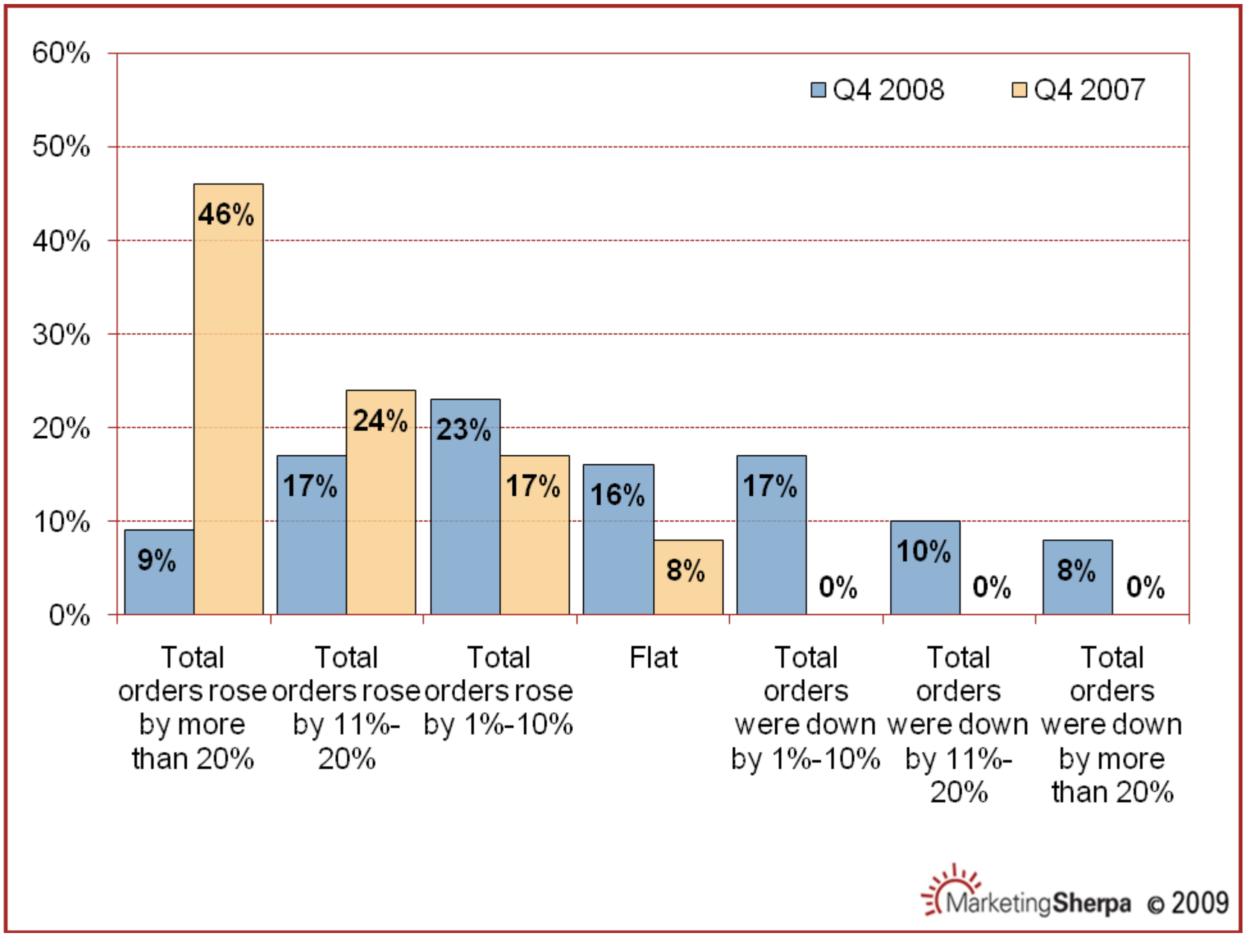
Our best wishes for a growing and profitable 2009 and 2010.

Stefan Tornquist, Research Director

Executive Summary

#1: A Brutal Fourth Quarter – Change in Total Orders

Comparison of Total Orders for Q4 in 2007 vs. 2008



Ecommerce was not immune to the retail slump that hit the 2008 holiday season. Although the estimate has moved around somewhat, the government initially put a figure of one percent growth on Q4 ecommerce (and something like twelve percent on the year as a whole) – far better than the 9% drop in overall retail, but still a remarkable change from the nearly 25% annual growth that ecommerce has enjoyed for years. When we last conducted this study, nearly half of all ecommerce businesses or divisions reported that they saw total orders grow by more than 20% in the twelve-month cycle ending in Q1 2007. Today, fewer than 10% of companies report similar growth.

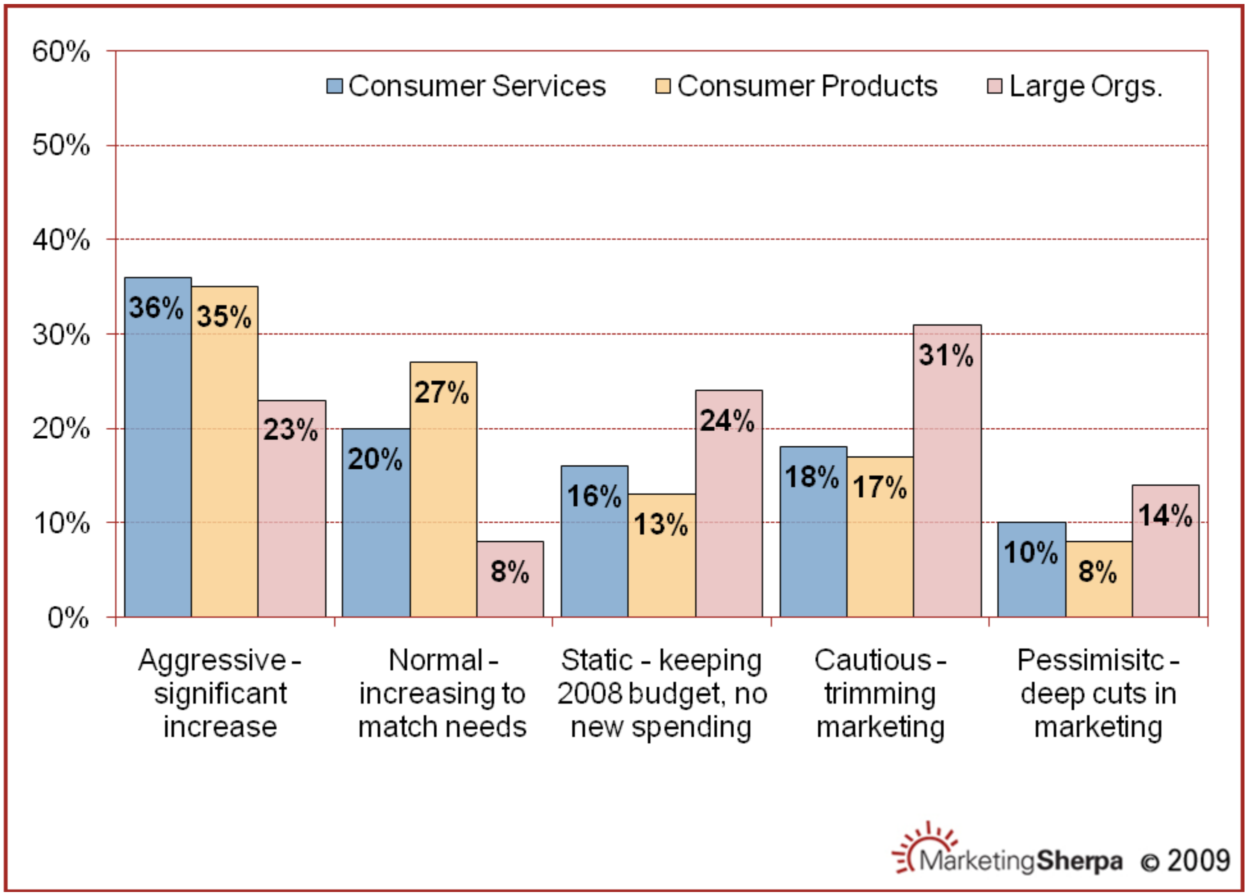
That said, very nearly half of our respondents reported some growth, and two-thirds were stable – or better. Companies that experienced losses tended to be in specific niches, such as luxury goods and apparel. Looking forward, there's reason for optimism that ecommerce, at least, will again enjoy significant growth by midyear.

Lost in the storm of the economic downturn is the natural maturation of ecommerce and the slower growth that goes with it. Projections from early 2008 were already pegging ecommerce growth to hover around 10% after a year or two around fifteen percent. Essentially, the downturn has compressed that early period, and pushed us into modest but stable increases. To be sure, traditional retail would be delighted with ten percent annual growth.

We'll spend the rest of this report looking at ways to take advantage of that growth.

#2: Assertive Marketing & Optimism – Especially from SMBs

Budget Attitudes by Product Type & Organization Size



Companies using ecommerce are taking a more aggressive stance toward budgeting through the downturn than the business world as a whole. Compared to a general business sample researched by MarketingSherpa, the ecommerce segment is 30% more likely to describe its attitude as 'aggressive' or simply 'normal.' Like the broader business world, however, large companies (over $50MM in annual revenues) are more likely to take a cautious or even pessimistic view.

History suggests that companies which invest in their brand and market presence emerge from down economies in a stronger position than those who choose to pull back. In some respects, a recession creates conditions which favor companies that choose to invest.

- Competition tends to be less aggressive. With most budgets (or at least most large budgets) being scaled back, there's room for mid-sized companies to improve their position against market leaders.
- Brand impressions are cheap, in every medium. Except for certain hyper-niche trade publications, space has never been cheaper. Whether it's online or in print or broadcast, now is a great time for companies to make themselves known. For those in a position to lock-in campaigns over the long term, current savings can be extended into the future as well.
- Likewise, talent is at a discount. Whether it's brining new people in-house as employees or contractors, or simply reworking vendor relationships, there's an excess of talent available for the first time since the tech bubble burst.
- Finally, downturns create the fear of bankruptcy and broken supply chains. It's important to project stability and health to current and potential customers. One way to do that is through brand and PR spending. Not only will you stake a larger claim thanks to bargain CPMs, but you'll benefit from implicit financial strength.

#3: Abandonment is Down… Why?

Top Methods of Reducing Shopping-Cart Abandonment – Analyst & Marketer Views

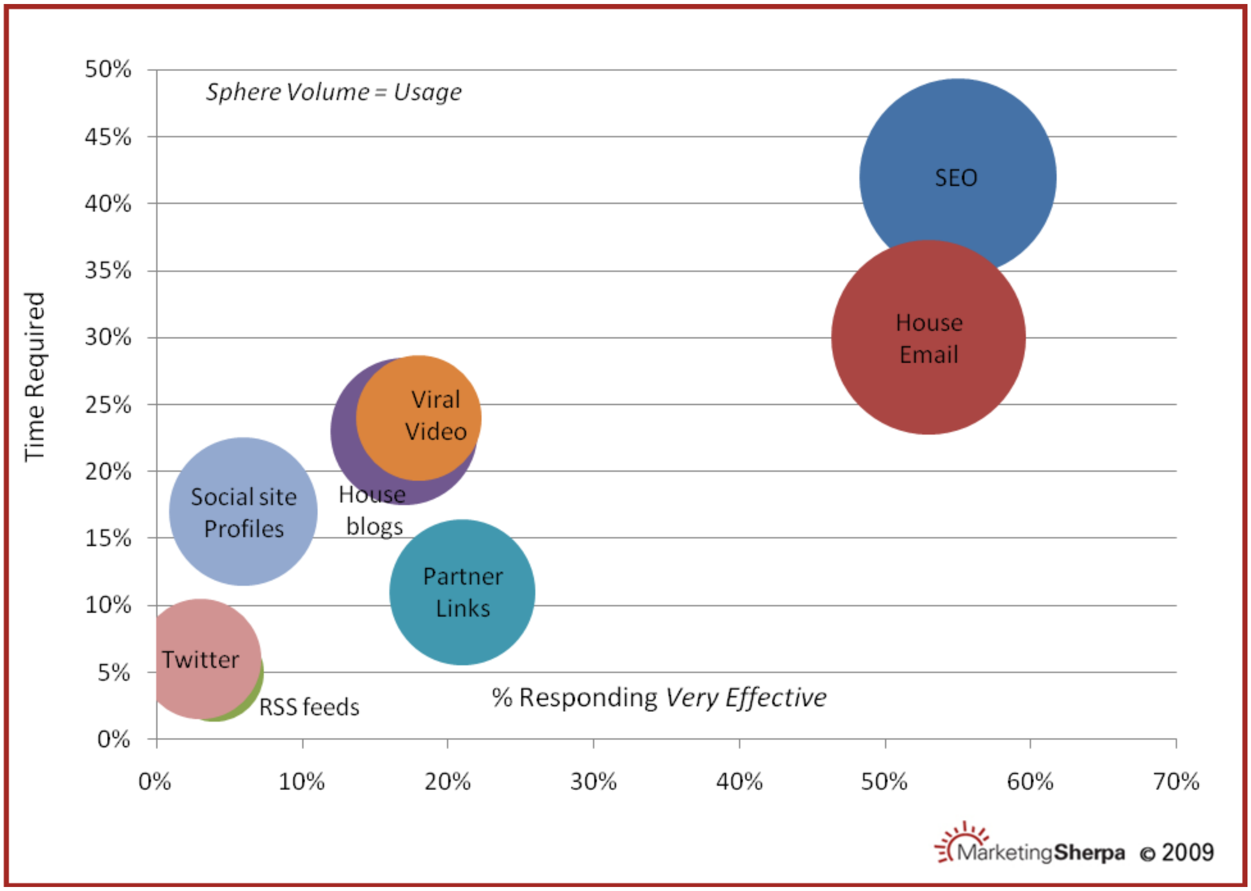
	Ranking	
	Analysts	Marketers
Usability - making the cart work more easily	1	1
Optimizing product pages	2	4
Reducing price "surprises"	3	2
Identifying volume/time-based discounts/special offers	4	3
Perpetual shopping carts	5	6
Offering alternative payment options	6	7
Moving registration/offers to after the purchase	7	5

The downturn has created a short-term spike in abandonment rates, but that's an aberration in an overall reduction since our last study. Although it depends somewhat on the type of targeted customer, there's been real improvement, and we wanted to understand why. Above is a list of some key best practices – explored at length in the report – with a ranking score given by a panel of analysts who specialize in process and purchase optimization.

The two groups disagree somewhat, but the importance of all of these practices shouldn't get lost in the competitive shuffle – they're all worth exploring and perfecting.

#4: Social Media is Here, But…

Low-Cost Traffic Sources Compared

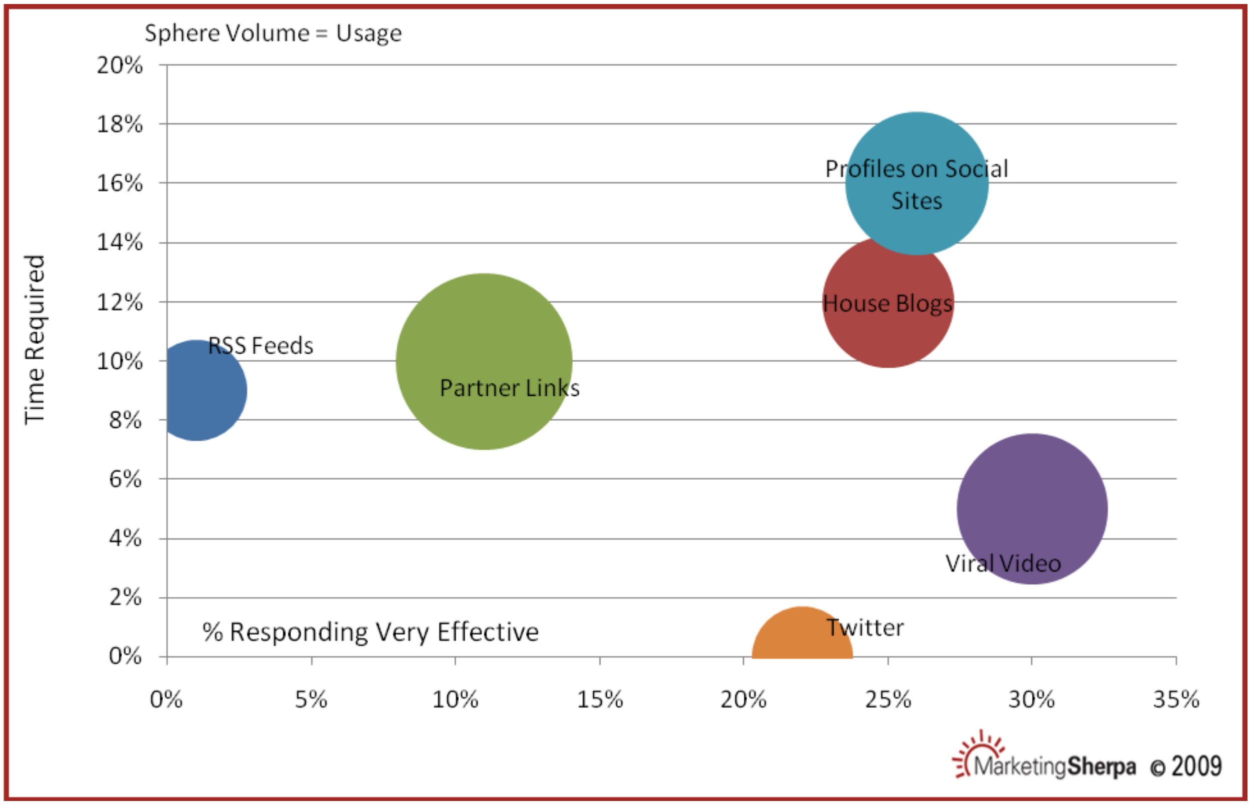


There's no doubt that social media is an immensely important trend or perhaps even a sea change in how we buy, sell and communicate. Still, the chart above puts the role of social and Web 2.0 tactics in some kind of perspective when compared to search engine optimization and tried-but-true house email. For the time being, the main drivers of traffic are the known quantities of SEM (free and paid), email and display.

Still, companies that dismiss social tactics on this basis will be left behind. Social media is essentially a set of technologies and practices that enable the oldest and most powerful marketing there is – word of mouth. In the long term, social media may have a positive effect on margins by rewarding sellers for qualities beyond price, such as customer service, on-time delivery, social awareness and the like. In the short term, it makes sense for companies to build an expertise and social presence while consumers and business people are still in the process of building their networks. Like the early days of email, it's probably a lot easier to make a name on Twitter or Facebook today than it will be in five years.

#5: Social Tactics Role Varies by Organization

Large Companies Rate Effectiveness of Social Tactics



For many, social marketing efforts are in their early stages, but exciting things are happening. Those marketers who report the best results with newer tactics tend to be those who also have expertise in the more ‘traditional’ aspects of online marketing and are marrying the old and new.

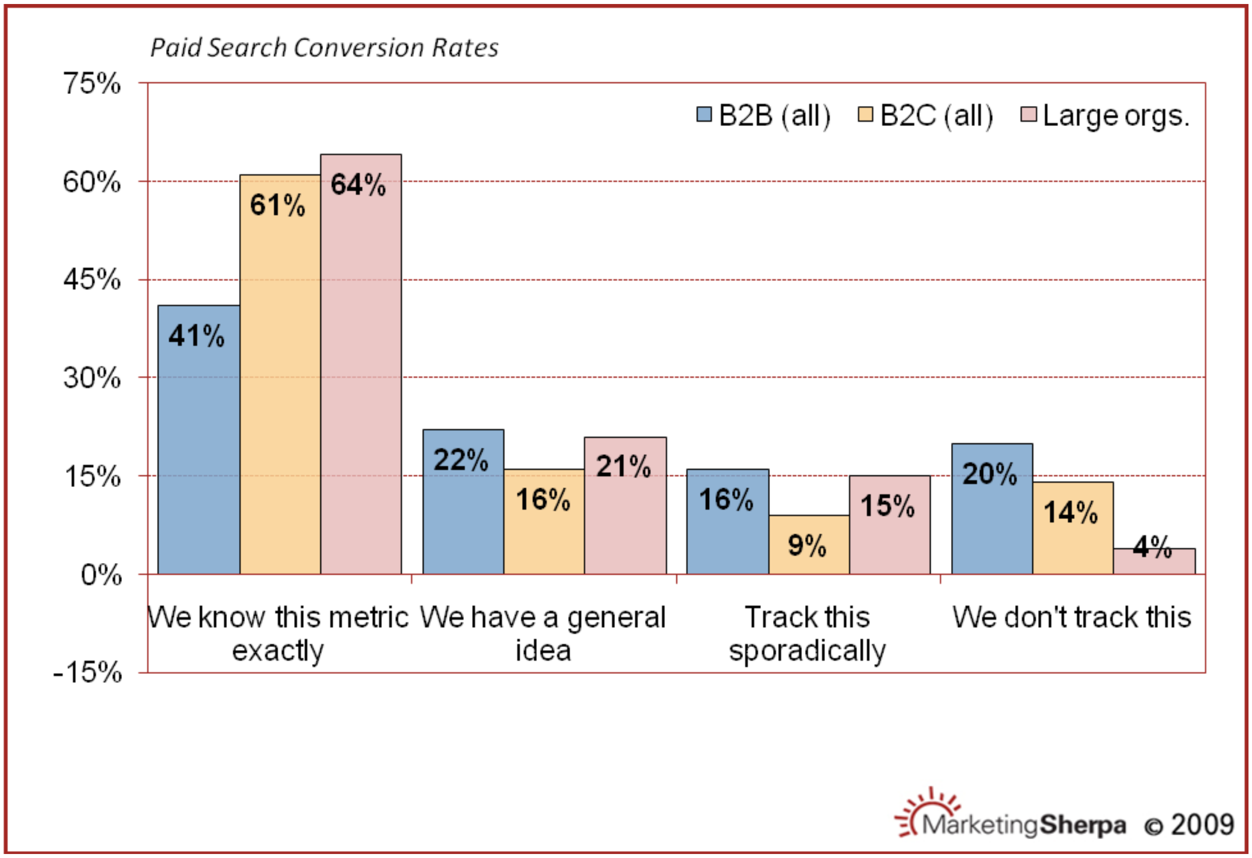
Above, we see how companies generating more than $50MM in revenue see the effectiveness of social and Web 2.0 tactics (which are explored in more detail later in the report). Amazingly, the new phenomenon of Twitter is already competing with more established media, as is the use of social site profiles. Interestingly, large companies rate both tactics more highly than some smaller competitors. It may be that marketers relish the flexibility and responsiveness of social tactics in the context of the typically slow-moving marketing processes of large companies.

It’s important to understand how we measure success for these emergent tactics. The history of online marketing is the story of an ongoing dispute about which measures are important and how we count them. At this stage, most marketers rate social tactics as being better for the more abstract roles of building brand awareness and enhancing/influencing brand reputation. In fact, when we asked marketers how social media matched up with common goals, generating leads and increasing online sales were at the bottom of the list.

The danger is that we may miss the larger, tangible impact of social efforts if we insist on hard numbers before putting in place the kinds of tools that can truly measure them. Online display advertising has suffered because banners don't generate many clicks. But this is an example of the wrong measure being applied. Banner ads are branding mechanisms, not true direct response tools, but they are judged on that basis. Similarly, if we look for immediate clicks from social media efforts, we will be missing most of their impact.

#6: What We Don't Know Can Hurt Us

Accuracy of Knowledge of Paid Search Conversion Rates by Company Focus & Size



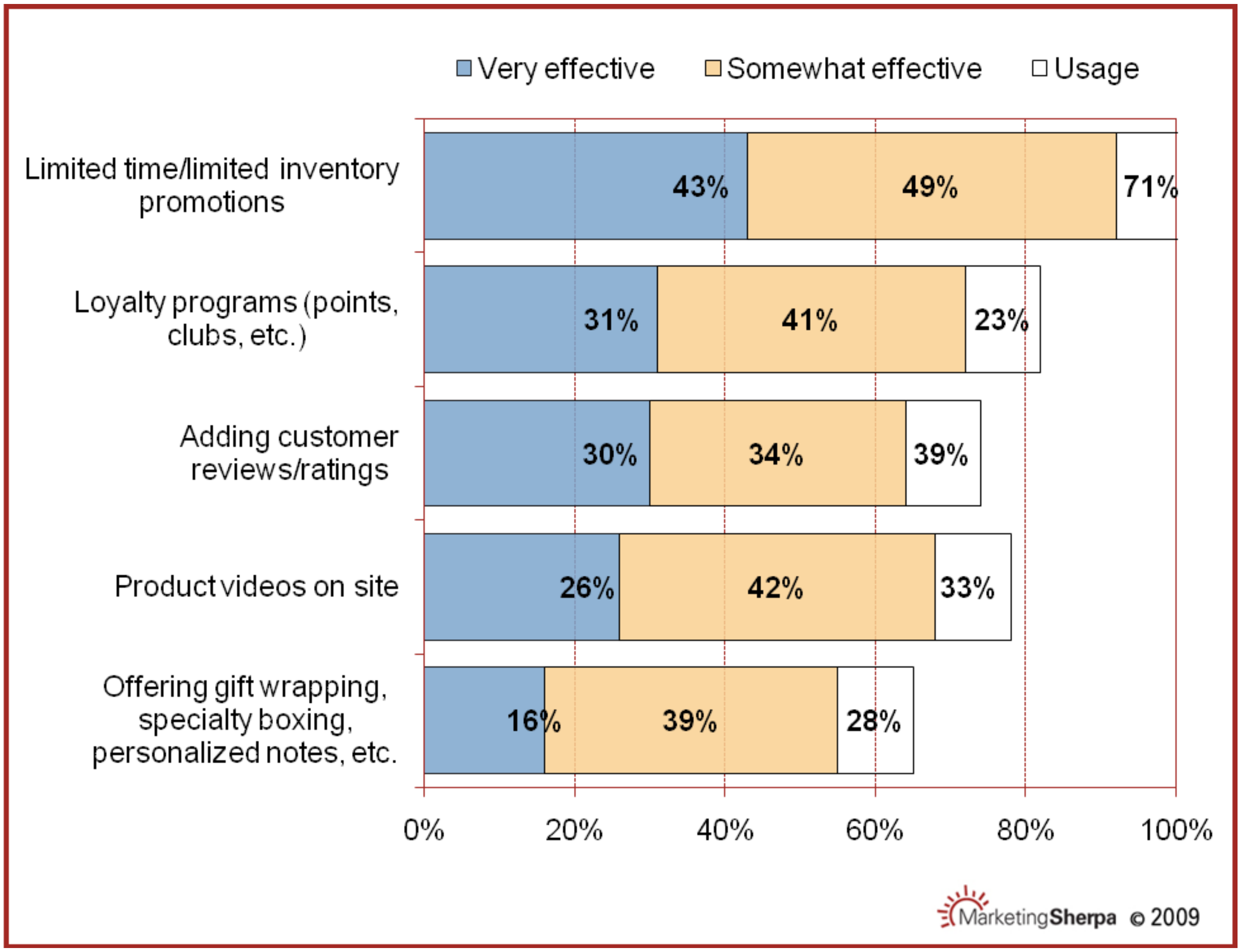
With everything facing marketers today – reduced budgets, smaller teams, expanding responsibilities – it's easy to lose sight of the importance of measurement and tracking. Some may even actively avoid measurement for fear of having inefficient marketing spend exposed. Above, we see that even in the high ROI world of paid search marketing, many companies are ignorant of essential metrics – only 41% of B2B ecommerce companies know their paid search conversion rates exactly. And although having a 'general idea' is better than having none, it creates room for error in what can be the most efficient arena for marketing today.

But search marketing is only one area of ecommerce marketing where the argument for accurate measurement has never been stronger. Websites play an ever increasing role in consumer and business purchases, even for those companies that generate the bulk of their revenue through offline sales. That means that we have an opportunity to observe how our customers and prospects view, research and buy our products and services. The only way to do this successfully over the long term is through analytics. With each innovation in media and technology, customer behavior gets more nuanced, but the need for tracking doesn't diminish.

With compressed margins and international competition, selling online is a business where a few percentage points mean the difference between profit and loss. The companies (and individual marketers) who will thrive in ecommerce over the long haul are those that truly understand what's happening under the hood of their marketing and their businesses.

#7: It's Not All About Price

Consumer Products Marketers Rate Engagement & Sales Tactics



In lean economic times it's natural for consumers to place a great emphasis on price, and retailers have implemented drastic price reductions to maintain cash flow and clear shelves. Even so, there are tactics and tools which can increase revenues without further decreasing slim margins. First among these is generating the perception of scarcity through limited time/inventory promotions, which are no less effective online that they have been for centuries in the marketplace. That speaks to some measure of brand loyalty to ecommerce sites, since another source for products is often just a search away. In that vein, loyalty programs also get good marks. Points, miles and accumulated discounts tend to have a greater psychological power than their monetary value would suggest. After all, “3,000 awards miles” sounds lot better than $30 in real-world dollars.

But the presentation and information around products are also powerful variables, and ones that can be affected without cutting prices or implementing expensive and complicated membership programs. 74% of respondents who have implemented consumer reviews (and/or ratings) report that they are an effective way of increasing sales and engagement. A similar number endorse the implementation of product videos, which can tell a story more powerfully than any product page or list of features can.

Interactive, dynamic ecommerce sites are a far cry from the static online stores of a decade ago. It’s now possible to create a truly enjoyable and unique online shopping experience and, therefore, much easier to build loyalty and brand affection. Price will always be a major factor in the buying process, but the increasingly interconnected world of consumer and business shopper is evolving. We’re headed for an online marketplace where investments in customer service and customer experience are rewarded by the opinion of the masses and the dollars of the individual.

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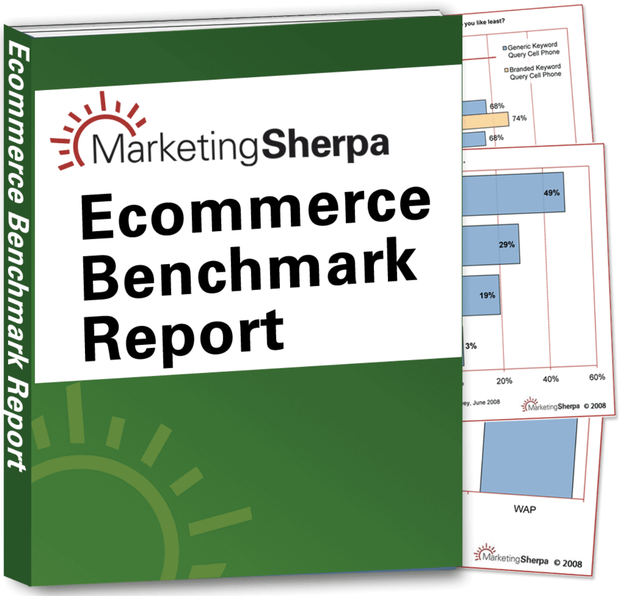
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