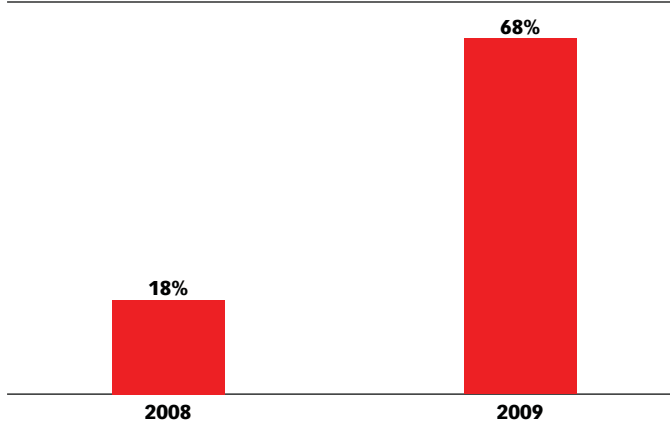


Video E-Commerce: Innovative Models Drive Sales

Executive Summary: Retailers are increasingly using video to accomplish a number of goals. Many use videos to complement the information on a product page; others produce entertaining clips to build brand authority. Still others turn them into a vehicle to drive traffic to their Websites.

Percent of Top 50* US Online Retailers that Offer Videos on Their Site, 2008 & 2009



Note: *based on the 2009 edition of the Internet Retailer "Top 500 Guide" of the largest US retail sites ranked by annual sales
Source: Forrester Research, "Online Retailer's Adoption of Online Video Content Is Ahead of Consumers' Preferences," November 5, 2009

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For additional information on the above chart, see the Endnotes section.

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Nonetheless, consumers rank other purchase decision-making tools, such as customer reviews, ahead of videos in importance. But that has not discouraged retailers from quickly adding videos to their sites. They find that videos boost sales conversion rates and reduce abandoned shopping cart and product return rates.

In the past year, significant technological advances have allowed retailers to incorporate interactive elements, such as the ability to click on an item in a video and have it placed in the customer's shopping cart. Video optimization is allowing retailers to change elements in their videos and measure the effect on sales conversion rates.

As e-commerce videos continue to become more accessible across more channels, they will play a larger role in consumers' online shopping experience.

Key Questions

- How fast have retailers and consumers embraced video e-commerce?
- How do consumers rank videos against other online purchase decision-making tools?
- How do retailers benefit from featuring videos?
- What are some of the innovative ways retailers use videos?



The eMarketer View

To examine some of the innovative uses of video in e-commerce, eMarketer interviewed six Web retailers, including BeautyChoice, Karmaloop and Rite Aid, whose solutions are covered as case studies later. It is clear from these interviews that retailers make decisions about objectives, content, production and presentation in crafting a video program.

Retailers need to decide what purpose their videos will serve. Ultimately they are about driving sales, but this can be accomplished in different ways. If a retailer's Website is already a popular destination with consumers, then the videos featured alongside product images can give a customer the extra boost of confidence needed to make a purchase. However, for a start-up Web retailer, syndicating videos on YouTube and other sites in the hope they go viral can be an important customer-acquisition strategy. For example, Rite Aid's Video Values program drives many shoppers to its Website by generating substantial buzz on coupon and bargain-hunting sites.

Videos can complement a product or stand alone. These are opposite ends of a spectrum with plenty of room for variation in the middle. Videos that complement a product tend to be informational. They explain the features of a product and its benefits. Viewers watch them because they are predisposed to buying the product.

In contrast, standalone videos have high entertainment content. Apparel retailer Karmaloop offers video interviews with musicians, artists and fashion designers. Bookseller Borders produces video programs featuring interviews with acclaimed authors and musical performances.

In the middle of this spectrum are instructional videos. They are focused on the product yet can stand alone. Home-improvement retailer Lowe's do-it-yourself videos, such as "How to Install a Locking Hardwood Floor," fall into this category. The immensely popular makeup videos on YouTube sponsored by health and beauty products retailer BeautyChoice are another example.

Lines can blur between informational and entertainment videos. During the 2008 holiday shopping season, JC Penney launched a viral marketing campaign with a video, "Beware of the Doghouse," intended to encourage the purchase of jewelry gifts. The video was viewed more than 1 million times on YouTube. Meanwhile, BlendTec, a kitchen blender manufacturer, has drawn millions of viewers to its "Will it Blend?" series on YouTube that features the company's CEO, Tom Dickson, blending such things as golf balls and shoes. A video showing him blending Apple's iPad attracted over 6 million views in one month.

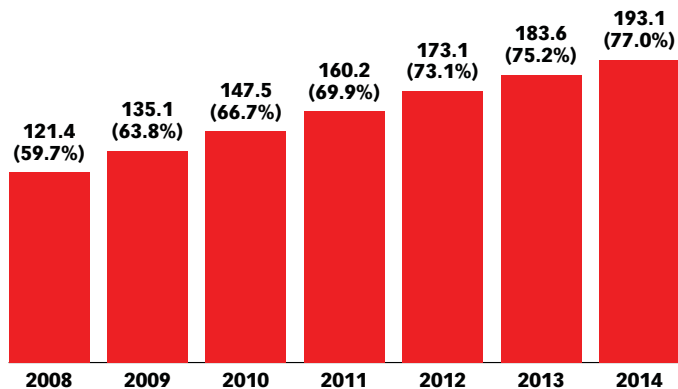
Videos can be professional or amateur works. For complex purchase decisions where there are many alternatives, such as with consumer electronics, shoppers often consult authoritative sources. On the shopping comparison site CNET, for example, editors host videos that tell consumers what they need to know about a particular product. But for products whose value is largely subjective, such as beauty products, an amateur video produced by someone like the viewer can have more credibility than an expert video. Retailers who partner with amateur video makers have less control over video content and distribution, but the amateur videos are cheaper to produce and have greater potential to go viral. As a startup needing to quickly drive traffic to its site, BeautyChoice considered creating its own videos but decided instead to work with young women whose makeup videos on YouTube already had a strong following.

The Current State of Video E-Commerce

Video has become a part of the daily online experience for consumers. They get beauty tips on YouTube, watch TV shows on Hulu, or simply go to CNN.com or MSNBC.com to watch news clips. More people also know how to post video clips to Facebook and Digg as well as download them, said Noreen Moriarity, director of Beauty.com, [in an interview with eMarketer](#).

In fact, the percentage of Internet users who watch all types of videos online at least monthly is expected to grow to 77% in 2014, up from 64% in 2009, eMarketer forecasts. More people with broadband Internet connections and greater video selection online are important contributors to this growth.

US Online Video Viewers, 2008-2014 (millions and % of Internet users)



Note: individuals of any age who watch video content online at least once per month
Source: eMarketer, April 2010

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Retailer Adoption

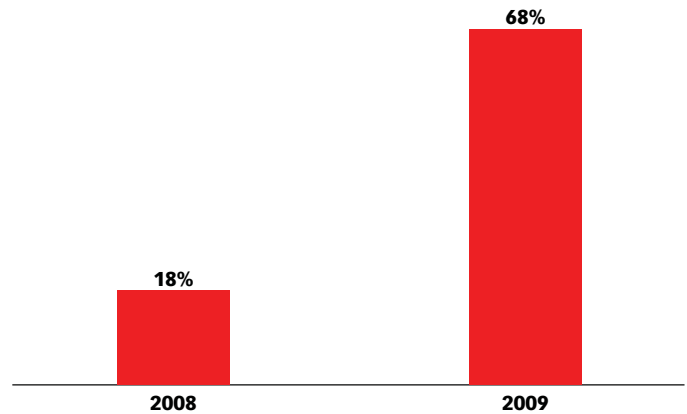
“There is less experimentation with video today in e-commerce, and more knowledge about where video works and where it doesn’t.”

—Justin Foster, co-founder and vice president, market development, Liveclicker, [in an interview with eMarketer](#), March 2010

Retailers are responding to the growing appetite for online videos by adding them to their Websites to both differentiate themselves from competitors as well as to keep up with what consumers expect from their online shopping experience.

The top 50 US online retailers that offer videos jumped 378% in 2009 over the year before, according to a Forrester Research study, “Online Retailers’ Adoption of Online Video Content Is Ahead of Consumers’ Preferences,” published in November 2009. Last year over two-thirds of the biggest online retailers hosted videos.

Percent of Top 50* US Online Retailers that Offer Videos on Their Site, 2008 & 2009



Note: *based on the 2009 edition of the Internet Retailer “Top 500 Guide” of the largest US retail sites ranked by annual sales
Source: Forrester Research, “Online Retailer’s Adoption of Online Video Content Is Ahead of Consumers’ Preferences,” November 5, 2009

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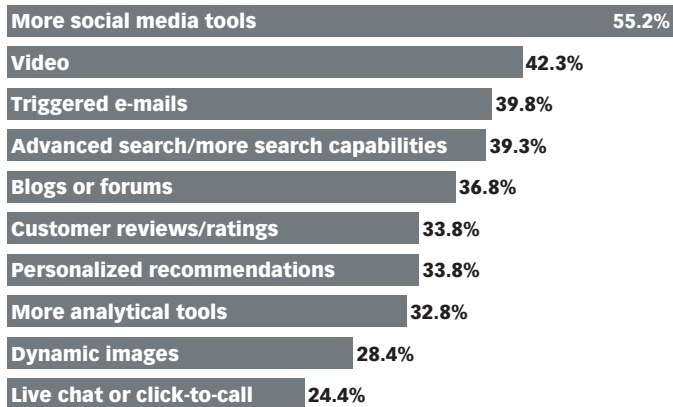
www.eMarketer.com

For additional information on the above chart, see the Endnotes section.

The Current State of Video E-Commerce

The adoption rate is poised to climb further, as revealed by a February 2010 Multichannel Merchant survey. Among the two-thirds of respondents who indicated they were planning a site redesign in the next 12 months, some 42.3% said they would add video to their site. That makes it the second-highest priority, well behind social media tools but ahead of other popular Website enhancements including customer reviews and personalized recommendations.

Features that US Multichannel Retailers Plan to Add to Their Site*, February 2010 (% of respondents)



Note: *in the next 12 months
Source: Multichannel Merchant, "Outlook 2010: E-Commerce," March 15, 2010

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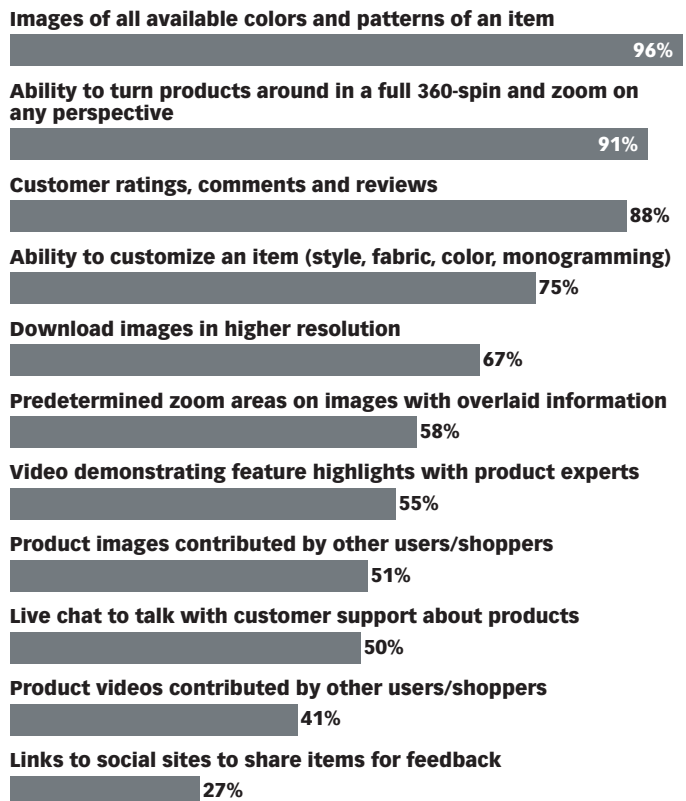
Retailers are making the case that videos boost their sales conversion rate, a measure of the increase in the percentage of shoppers who make a purchase after viewing a product video. Retailers also claim videos reduce shopping cart abandonment rates and lower product return rates.

- **BBQGuys.** The conversion rate goes up about 20% when CEO Mike Hackley talks about his low-price guarantee in a paid-search landing-page video on the barbecue products e-commerce site (Internet Retailer, July 2009).
- **OnlineGolf.com.** Customers who view product videos are 85% more likely to buy than shoppers who do not view videos (Internet Retailer, April 2010).
- **Onlineshoes.com.** Customers watching its videos converted into buyers at a rate 45% higher than the site's average customer. (Multichannel Merchant, February 2010).
- **Skis.com.** The company saw a 19% lift in conversion rates after it more than doubled its online video library of on-snow ski reviews (Internet Retailer, July 2009).
- **Zappos.** The shoe/apparel e-tailer realized a 6% to 30% increased sales conversion rate in products that have videos (ReelSEO, December 2009).

Consumer Usage

Videos face stiff competition from many other useful Website features that enhance the online shopping experience, according to a November 2009 survey by Adobe Scene 7. The survey found that medium-to-heavy online shoppers rated images showing colors and patterns, 360-spin and zoom, and customer ratings, comments and reviews well ahead of professional product videos or those contributed by other users/shoppers.

Useful Features that Enhance the Online Shopping Experience According to Online Shoppers* in North America, November 2009 (% of respondents)



Note: *medium to heavy online shoppers who had both researched and purchased a product online in the past 12 months and spent at least \$500 shopping online throughout the year

Source: Adobe Scene7, "Viewer Study: What Shoppers Want," January 2010

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The usefulness of e-commerce videos can vary dramatically depending on how retailers present them. An October 2009 study by Liveclicker, a video commerce solutions provider, found that retailers that promoted video in a big way on their Website, so there was no mistaking their presence, had play rates of 45%, while those that featured video as a minor visual element on their site had play rates of less than 1%.

Retailers' viewership numbers prove that when the right video business model is employed, they can be very successful in drawing sizable audiences.

- **Karmaloop.com.** It has between 100,000 to 500,000 video views a week, with celebrity videos garnering the highest numbers (eMarketer interview).
- **Rite Aid.** It averages between 500,000 to 600,000 video views each month (eMarketer interview).
- **Beauty.com.** The most viewed video on the retailer's Website has almost 88,000 views and is about Liquid Keratin, a product with limited distribution that launched in January 2009 (Beauty.com Website).

Technological Advances

In the past year, video e-commerce has made technological strides on several important fronts. [In an eMarketer interview](#), Justin Foster, co-founder and vice president of market development at Liveclicker, highlighted three advances that have made video more accessible to consumers across more channels.

- **New video features.** Retailers are incorporating data from their Websites into their video content to make them more interactive and compelling. For example, Kathleen McNeill, vice president of beauty at Drugstore.com, [told eMarketer](#) that its wholly owned subsidiary, Beauty.com, allows people to post its videos on Facebook, MySpace and Digg as well as leave comments. Also, product links are embedded in videos, so visitors can click on a product in the video to go directly to the product detail page.
- **Video optimization.** To maximize their video revenue opportunities, retailers are experimenting with their video content, presentation and interactive elements. They use programs such as Google Analytics, Omniture's SiteCatalyst and Coremetrics to measure the effect on viewership from making changes to a product video. Mr. Foster cites eBags, a Liveclicker client, as an example of a retailer that has taken advantage of video optimization tools to drive an average of 70% more video views simply by varying the first frame displayed in its product videos.
- **Automated video production.** Retailers are making greater use of software that enables them to easily stitch together the various shots used in creating a product video. This is helping retailers create more videos quickly. Mr. Foster said that REI, Kohl's and Shoes.com are using automated tools to produce 15 to 20 videos in a single day.

Video E-Commerce Case Studies

The following video e-commerce case studies of Beautychoice.com, Karmaloop.com and Rite Aid illustrate innovative uses of video e-commerce.

BeautyChoice.com Taps YouTube Beauty Stars



Background

BeautyChoice.com is a two-year-old Internet pure-play retailer that sells over 11,000 name-brand items for the hair, skin and body as well as more than 5,000 name-brand fragrances.

The Challenge

[In an interview with eMarketer](#), Jordan Blum, president of BeautyChoice, explained that as a new company in a highly competitive category, it was difficult to get Web traffic. Further, BeautyChoice did not feature the articles, customer reviews, blogs or professional beauty tips that better financed health and beauty sites offer. The retailer experimented with Google AdWords and banner ads but these channels did not drive as much traffic as BeautyChoice had wanted. The retailer knew it needed an innovative way to bring shoppers to its site.

The Solution

BeautyChoice first considered producing its own videos, with the goal that they would be compelling enough to go viral. But then the retailer discovered someone on YouTube who had over 100,000 views of her makeup tutorial. It then found several other people with similarly high amounts of traffic who were just making the videos for fun.

BeautyChoice decided to see whether these amateurs—most of whom were 18 and 19 years old—would be interested in trying some of the products on its site and giving an honest review that could be shared with the retailer's customers. They were ecstatic, Mr. Blum said. So BeautyChoice began sending them products to review with very few instructions. The young women either got a flat fee, a flat fee plus a commission or just the product.

About a year ago, a young woman named Michelle Phan created a video on how to create a makeup and hair-style look modeled after the pop singer Lady Gaga. BeautyChoice supplied Ms. Phan with the wig and some gloves for the video. In the comment box, a link went directly to the wig and the pair of gloves at BeautyChoice.com. The video had about 6 million views in the first two months and has since climbed to 16 million, according to Mr. Blum. While the wig is no longer available, the retailer sold a lot of the gloves just before Halloween last year.

Now BeautyChoice has about 20 young women on contract who do a number of videos a month. It asks them to insert a link into the comment box on their YouTube video page, a link that goes to the product page at BeautyChoice.com so that consumers can buy the featured product.

BeautyChoice reports impressive statistics. Around 43% of its site traffic comes from YouTube. The conversion rates for no-name product promotions it has run have been as high as 15%. By comparison, the highest rate BeautyChoice ever achieved with Google AdWords was about 6%. The products that realize the highest conversion rates are those that show before-and-after results. And while eye cream used by an 18-year-old isn't going to jump off the screen in a before-and-after, showing someone how to transform pin-straight hair into wavy hair is demonstrable.

In the future, BeautyChoice plans to launch a new site for which its contributors will produce original video content. The retailer will experiment with a tool to syndicate the video to multiple sites. Its plan is to hit every single vertical related to the beauty category and to connect brands with video stars for product placement. The retailer envisions launching verticals that are complementary to beauty—such as fashion.

Takeaways

YouTube videos have proven to be more cost-effective than paid search for driving traffic to BeautyChoice. Additionally, YouTube produces higher-quality leads because people who watch the retailer's sponsored videos show a high level of interest in its products, as demonstrated by their willingness to watch a 6-minute video. BeautyChoice wisely recognized that it could jump-start its business by working with YouTube video makers who already had a large following, rather than by trying to create compelling videos in-house that had no guarantee of going viral.

The amateurish quality of the videos also works to BeautyChoice's advantage. Videos do not have to be TV-quality to be persuasive. BeautyChoice's make-up artists and bloggers often shoot videos in their own bathrooms with conventional camcorders. Mr. Blum believes a girl next door showing how she can transform herself is more believable than a professional makeover video with perfect lighting in a state-of-the-art production studio. Perhaps the proof lies in Michelle Phan's Lady Gaga video.

Karmaloop.com Sells Cutting-Edge Fashion Through Video



Background

Launched in 2000, Karmaloop.com is a Boston-based online retailer of name-brand underground streetwear and fashion. Its target market is 18-to-24-year-old males who are members of what the retailer calls the verge culture—a new generation that has grown up using the Internet and whose interests combine art, music and fashion. The fast-growing retailer projects that revenues will reach about \$100 million in 2010.

The Challenge

Karmaloop wanted to be more than an apparel retailer. CEO Greg Selkoe told Internet Retailer in June 2009 that he wanted to build “a community of style” that would give its customers ways to interact with the brand beyond buying products. [In an interview with eMarketer](#), Giovannah Chiu, lifestyle marketing director, said “We wanted to have a multiplatform kind of site—basically a one-stop shop where people can go to buy clothes, get information via our blogs and also watch videos.

The Solution

In 2008, the retailer officially launched KarmaloopTV and placed all its video together under one tab on its homepage. The videos feature exclusive interviews with designers, brands, artists and musicians, as well as behind-the-scenes looks at events, parties and street culture at large.

Karmaloop has an in-house production team that creates over 90% of its videos, but it also posts videos that its brands create to support their new fashions for the season. Karmaloop buyers, who have an authoritative voice on what is happening and what is in, host videos and the products featured have good sell-through. Videos receive from 100,000 to 500,000 views a week depending on the content. Celebrity videos featuring people such as musicians Kanye West and Kid Cudi, actor Nick Cannon and artist Shepard Fairey, drive viewership.

Karmaloop began implementing Clickable TV, enabling viewers to click on an item in a video to add it to their shopping cart. Viewers can also rate videos, write comments and share them with friends. Karmaloop provides some musicians and artists with clothing to wear. The artists provide the music video and Karmaloop puts those videos on its site and implements the clickable feature to highlight items.

Karmaloop syndicates many of its videos, especially those with celebrity content or covering special events such as the South by Southwest Music Conference. Karmaloop has a channel on YouTube and DailyMotion, and works with bloggers such as Culture Shoq.

The company has ambitious plans to launch an ad-supported HD cable network, with a goal of 60 million subscribers. Initially the channel will offer about 70% feature movies, cult film classic and rarely seen documentaries, and 30% original programming that targets a young demographic. While there will not be home-shopping shows, there will be opportunities to connect KarmaloopTV on-air programming with commerce through clickable ads and other interactive features.

“We felt that this is natural extension of our brand to go into the cable business because there really isn’t an MTV for this generation that’s edgy and underground.” —Greg Selkoe, CEO, Karmaloop, as quoted in *Multichannel News*, March 2010

Takeaways

By embedding itself within the niche culture it serves, Karmaloop has befriended the musicians, artists and fashion designers who define the verge culture sensibility. This makes the cost of creating celebrity videos cheaper than what much bigger brands must pay to recruit stars to promote their products.

A cable TV channel reflects Karmaloop’s grander ambition to be the voice of the verge culture. An ad-supported cable TV network could easily become a bigger revenue producer for Karmaloop than its retail business. This would cement the company’s transformation into a complete “community of style” brand.

Rite Aid Ties Online Videos to In-Store Discounts



With us, it's personal.

Background

Drugstore chain Rite Aid has nearly 4,800 stores in 31 states and the District of Columbia. Its e-commerce site sells pharmacy items, household, personal care, nutrition, wellness and beauty products. In fiscal 2009, which ended February 28, 2009, revenues totaled \$26.3 billion.

The Challenge

In 2009, like many other drug retail chains, Rite Aid was searching for ways to boost sluggish sales that resulted from the recession. The company needed to find ways to offset an industrywide downturn in prescription sales growth and high operating expenses.

The Solution

One strategy was to expand its e-commerce capabilities with services that would drive in-store sales. As a result, in August 2009 the company announced a 24-hour online prescription-refill service to let customers pick up their order at Rite Aid stores.

At the same time, Rite Aid unveiled its Video Values program, featuring informative, educational and, in some cases, entertaining videos. The Video Values program runs on a platform hosted by video marketing firm Ad Perk. By watching videos, customers earn video credits for savings on products. For example, viewers of a clip for a Brita Water Filtration product earn a \$2 coupon off one of the Brita items offered. They must print the coupon and present it at the store. When they rack up 20 video credits, they receive a \$5 Rite Aid Bonus Coupon.

Video Values is prominently featured on Rite Aid’s homepage and through its weekly circular, in-store radio, at the shelf of the participating brands and in cross-promotional ads. Shoppers can find videos for various products by brand, category and manufacturer. The only exceptions are for videos of the pharmacy and private-label goods on the site, which are shot in-house. Rite Aid reports that it is averaging between 500,000 and 600,000 video views each month. Redemption rates average nearly 20%, depending on the coupon.

John Learish, senior vice president of marketing at Rite Aid, told [eMarketer](#) that one of the pleasant surprises of the video program has been its success in driving traffic to Rite Aid’s Website. People learn about the program from e-mails, coupon sites, shopping sites and blogs. This buzz, and the ensuing viral effects, drives a lot of traffic to RiteAid.com.

Customers must register to participate in Video Values, but this has not been a barrier, according to Mr. Learish. About 35,000 people sign up on Rite Aid's Website each month. Registration means the program is able to generate a lot of demographic data on customer shopping behavior, for example, if they watch a video and then toggle off the site, and if the video stops or is fully viewed. Additionally, the printable coupons are personalized, so Rite Aid knows the number of times a person requests a coupon and the number of coupons redeemed.

Takeaways

The volume of video views indicates that consumers are willing to watch 30-second TV commercials on Rite Aid's site in exchange for discount coupons. People who view the videos have an interest in the product, and that translates into a purchase. The viral nature of the program gives Rite Aid an extended marketing force on bargain hunting sites and blogs.

“Customers who spent the time to watch video were much more predisposed to make the purchase.” —John Learish, senior vice president, marketing, Rite Aid, in eMarketer interview, April 2010

By requiring that coupons be redeemed in-store, Rite Aid avoids shipping fees on many non-prescriptive drug products that have thin profit margins. It also knows that shoppers who come to the store to redeem their coupons frequently make impulse purchases.

The information collected from Video Values participants is highly valuable not only to Rite Aid but also to the product manufacturers. This information can be used for targeted marketing campaigns and adjusting the merchandising mix.

Conclusions

Be open-minded to new ideas about developing a video program. When BeautyChoice needed to establish itself with consumers, it began creating compelling videos that would go viral. But the company soon realized that it could jump-start its video program by partnering with young YouTube stars who already had fans watching their makeup videos. The program worked surprisingly well at a fraction of the cost required to make in-house videos.

“The fundamental mistake retailers make is thinking ‘I’ll create my own video, put it on YouTube and I will be a huge success.’ You have to establish a relationship with the people the YouTube community already trusts.” —Jordan Blum, president, BeautyChoice.com, as quoted in Internet Retailer, March 2010

Make it easy for customers to find your product videos.

The success of a video can vary widely depending on how and where it is presented on the retailer's site. Studies from Liveclicker and Invodo, both video commerce solutions providers, showed that adding a call-out that prompted the user to watch a video increased viewership. So did increasing the size of the video player on a product page.

“These studies suggest that if shoppers have a hard time discerning that your site offers video, they’re less likely to watch your content.” —Justin Foster, co-founder and vice president, market development, Liveclicker, in Practical eCommerce, April 2010

Create persuasive videos. Justin Foster of Liveclicker says there are three fundamental steps retailers must follow in creating videos that sell.

- They must understand why shoppers buy a particular product. At a core level it could be from hope, fear, social acceptance or rejection, pleasure, or pain. A video must then address these underlying human motivators.
- Videos should give shoppers a concrete reason to buy the product from the retailer instead of from one of its competitors.
- Retailers must put a call to action within their videos that prompts viewers to take an action. That could include clicking on an item to add it to their shopping cart or to open up the product page.

Consider an iPad video application. It is not too early for retailers to begin thinking about developing applications for Apple's iPad that feature product videos. An April 2010 article in AdAge.com highlighted Gap's 1969 Stream iPad app, launched earlier in the same month. It creates a shopping experience by including content from designers, musicians and fashion insiders. Shoppers have the ability to purchase items without leaving the app and share them with a friend. The app works with the iPad's geo-locator to find the nearest Gap store.

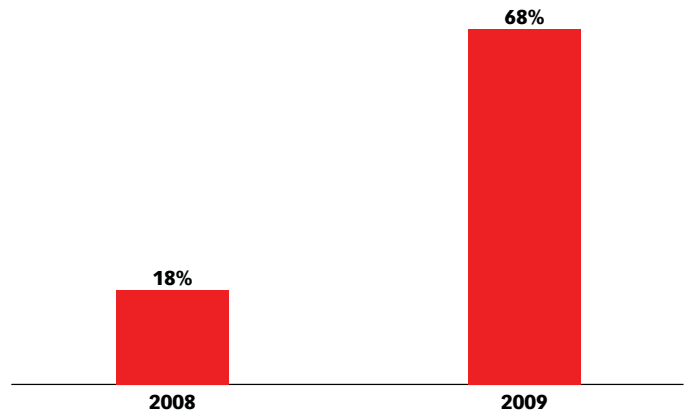
"The iPad will be a new cultural icon. And the way it allows people to engage, we didn't want to be left out of that." —Ivy Ross, executive vice president, marketing, Gap, as quoted in AdAge.com, April 2010

Endnotes

Endnote numbers correspond to the unique six-digit identifier in the lower left corner of each chart. The charts from the report are repeated before their respective endnotes.

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Percent of Top 50* US Online Retailers that Offer Videos on Their Site, 2008 & 2009



Note: *based on the 2009 edition of the Internet Retailer "Top 500 Guide" of the largest US retail sites ranked by annual sales
Source: Forrester Research, "Online Retailer's Adoption of Online Video Content Is Ahead of Consumers' Preferences," November 5, 2009

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Extended Note: Read chart as saying that in 2009, 68% of the top 50 online retailers offered video on their site.

Related Information and Links

Related Links

Following are links to retailers and specific videos discussed in this report.

BeautyChoice

<http://www.beautychoice.com>

Blendtec, "Will It Blend?"

<http://www.youtube.com/user/Blendtec>

Borders Media

<http://www.bordersmedia.com>

CNET TV

<http://cnettv.cnet.com>

JCPenney, "Beware of the Doghouse"

<http://creativity-online.com/work/jc-penney-beware-of-the-doghouse/14501>

KarmaloopTV

<http://www.karmalooptv.com>

Lowe's how-to videos

<http://www.lowesditv.com>

Michelle Phan, "Lady GaGa Makeup Tutorial"

<http://www.youtube.com/watch?v=YFMaLul1uxc>

Rite Aid Video Values

<http://my.adperk.com/splash/d30b50da/index.html>

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