

December 2016

# LOYALTY MARKETING ROUNDUP

The vast majority of US internet users belong to at least one loyalty program, and what they want may seem simple: rewards. But there are a number of challenges for loyalty marketers looking to create the most effective programs. eMarketer has curated this Roundup of articles, insights and interviews to help you understand how marketers and consumers alike approach loyalty.

presented by



# LOYALTY MARKETING ROUNDUP

## Overview

Most internet users in the US are members of at least one loyalty program. According to June 2016 research from Urban Airship, for example, 92% of US and UK internet users belong to one, including 19% who belong to at least six. And the reason for belonging is simple: rewards.

Salesforce, for example, found in May that 83% of US internet users said they chose to join a brand's loyalty program because of points or rewards. This was the top reason for respondents in every age group. More than seven in 10 members of each age group also said they joined to get better deals.

Similarly, 3Cinteractive found that 40% of US internet users named rewards as the primary motivation for joining loyalty programs in March 2016. Another 20% pointed to deals, and 5% cited points.

RIS News found in May 2016 that 81% of US internet users considered points or rewards per dollar spent a benefit of loyalty programs. Two-thirds cited automatic discounts as well.

But it's not quite that simple. Earlier in the year, Bond Brand Loyalty and Visas reported somewhat different findings when they asked US internet users what made them satisfied with loyalty programs. For most sectors, the most critical element was whether the program meshed with consumer expectations of the brand. It was also important that it not be too difficult to redeem rewards, or to accumulate them.

And for marketers, there are challenges to meeting these desires. Chief among them is technology, according to March 2016 research from Accenture. Two in five US retail loyalty professionals responding to that survey said tech was an issue, while one-third pointed to each of strategy and financial management.

Technology is also a leading investment area for these respondents, along with more spending on marketing loyalty programs.

## Reasons that US Internet Users Chose to Become a Member of a Brand Loyalty Program, by Generation, May 2016

% of respondents in each group

	Millennials (18-34)	Gen X (35-54)	Baby boomers (55+)	Total
I get points/rewards	83%	81%	86%	83%
To get better deals	72%	77%	71%	74%
I feel I get better service	23%	27%	33%	27%
To have a closer relationship with the brand	15%	13%	13%	14%
Community of other people who are loyalty members	11%	9%	2%	8%
Status symbol	11%	7%	2%	7%
Other	3%	1%	0%	1%

Note: among those who are members of a brand loyalty program  
Source: Salesforce, "2016 Connected Consumer Goods Report," June 13, 2016

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## Top 5 Attributes that Drive Loyalty Program Satisfaction According to US Internet Users, by Category, Jan 2016

	CPG	Dining	Health & beauty	Pharmacy/grocery
1.	Meets needs	Fits with brand/company expectations	Fits with brand/company expectations	Fits with brand/company expectations
2.	Fits with brand/company expectations	Meets needs	Enjoy participating	Meets needs
3.	Level of effort needed to earn a redemption	Ease of redemption	Makes brand experience better	Level of effort needed to earn a redemption
4.	Program/brand reps make me feel special/recognized	Time to receive redeemed rewards/benefits	Level of effort needed to earn a redemption	Ease of redemption
5.	Enjoy participating	Makes brand experience better	Meets needs	Amount accumulated per \$1 spent
	Retail-other	Travel	Total*	
1.	Fits with brand/company expectations	Fits with brand/company expectations	Fits with brand/company expectations	
2.	Meets needs	Ease of redemption	Meets needs	
3.	Enjoy participating	Level of effort needed to earn a redemption	Enjoy participating	
4.	Ease of redemption	Meets needs	Level of effort needed to earn a redemption	
5.	Level of effort needed to earn a redemption	Enjoy participating	Ease of redemption	

Note: \*also includes responses for bank-branded cashback/rebates, bank-branded points and cobrand credit  
Source: Bond Brand Loyalty, "The 2016 Bond Loyalty Report" in collaboration with Visa, June 7, 2016

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# US Marketers Plan to Invest More in Loyalty Programs by 2017

## Members join because of ease, and desire for rewards

The majority of US marketers intend to allocate more of their budgets to customer loyalty in 2017, according to research. And about 13% said they anticipate significant increases in spending on such programs.

Multichannel loyalty and analytics company CrowdTwist, in partnership with Brand Innovators surveyed 234 digital marketers about their customer loyalty programs in the US throughout March and April 2016.

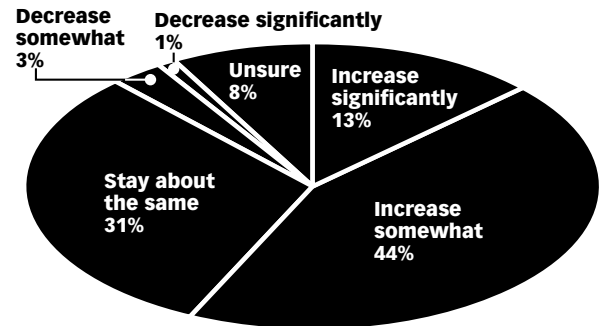
According to the research, more than half of respondents said they plan to put more dollars into their loyalty programs next year. Almost half (44%) of all respondents said they will somewhat increase loyalty budgets, and 13% plan to significantly. Meanwhile, a mere 4% said they anticipate lowering investment.

In anticipation of having more dollars to play with for loyalty programs, marketers should think critically about what areas of their programs may attract increased participation rates. In a summer 2015 survey from Maritz Motivation Solutions, 43% of loyalty program members said the top reason for joining in summer 2015 was because of their desire to earn rewards.

Meanwhile, 31% said it was because it required a low effort to sign up. In fact, in another related study from October 2015, Colloquy uncovered that 81% of those who joined a loyalty program said they continued to participate because it was easy to understand. And 75% said they stayed because the rewards and offers were relevant to them.

### Expected Change in Budget Allocated to Customer Loyalty Programs in 2017 According to US Digital Marketers

% of respondents



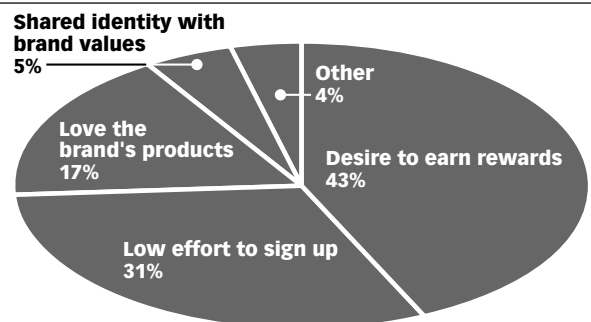
Source: CrowdTwist and Brand Innovators, "The Loyalty Evolution: Growing Investment and the Multichannel Promise," May 24, 2016

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### Primary Reason for Joining Loyalty Programs According to US Loyalty Program Members, Summer 2015

% of respondents



Note: ages 18+

Source: Maritz Motivation Solutions, "Maritz LoyaltyNext Customer Study," March 1, 2016

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# Loyalty Members Are Only Active in About Half of Programs

## Marketers plan to shift more dollars to customer loyalty by 2017

The average internet user in North America belongs to roughly 13 customer loyalty programs for companies in various industries. Yet, according to research, members are only actively participating in about half of the initiatives they have signed up for.

In January 2016, Bond Brand Loyalty, in partnership with Visa, polled roughly 12,000 US internet users about their attitudes toward loyalty programs, and their participation.

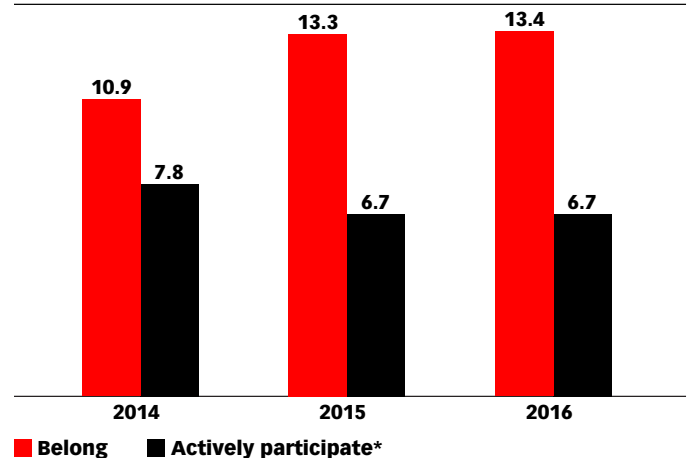
On average, respondents said they belong to slightly more than 13 loyalty programs this year. That number had barely budged from 2015, though it had increased since 2014.

However, of those memberships, these internet users said they only actively participate in about seven. Again, the results mirrored findings from 2015—when participation was down from a year earlier.

Looking ahead, US marketers are aiming to shift more dollars of their budget toward customer loyalty programming in 2017. In a separate May 2016 survey from Crowd Twist and Brand Innovators, 57% of respondents said they plan to invest more in these types of initiatives, compared to a mere 4%, who anticipate cutbacks.

So, with more expected dollars at hand on the horizon, what should these marketers focus on in their loyalty programs to encourage more signups and continuous participation by members? Maritz Motivation Solutions uncovered last summer that the plurality, or 41%, of US loyalty members said they joined to earn more rewards, followed by 31% who said they signed up because it didn't take much effort. Perhaps brands should have a program that's easy to understand, too. In October 2015, 81% of US internet users told Colloquy that they want a program that is simple to figure out, followed by relevant rewards and offers (75%).

**Average Number of Loyalty Programs to Which US Internet Users Belong vs. Actively Participate\*, 2014-2016**



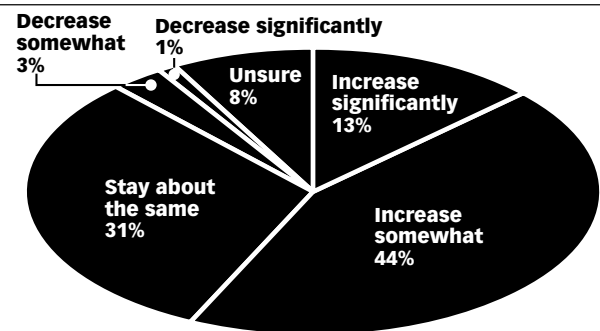
Note: \*made a purchase in the past 12 months  
Source: Bond Brand Loyalty, "The 2016 Bond Loyalty Report" in collaboration with Visa, June 7, 2016

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**Expected Change in Budget Allocated to Customer Loyalty Programs in 2017 According to US Digital Marketers**

% of respondents



Source: CrowdTwist and Brand Innovators, "The Loyalty Evolution: Growing Investment and the Multichannel Promise," May 24, 2016

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# Consumers Prefer SMS for Loyalty Program Updates

## Only 21% of brand marketers use SMS for their loyalty program

Nearly half of US internet users said they prefer receiving loyalty-related messages via SMS, March 2016 research found. Yet less than a quarter of US brand marketers use SMS for their loyalty program, that same study revealed.

Mobile marketing company 3Cinteractive surveyed 3,500 US internet users and 250 US brand marketers. SMS was clearly the largest preference in how internet users want to receive communications from brands. In fact, more than twice as many internet users preferred SMS as email, and the same went for app notifications.

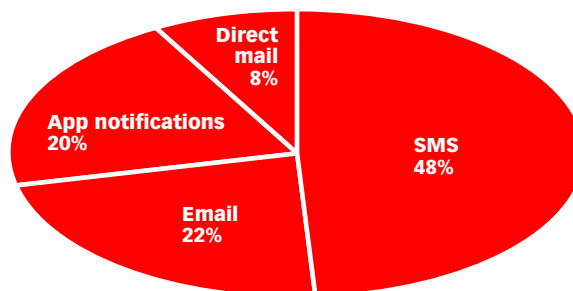
But also according to 3Cinteractive, the top three mobile channels used for loyalty by brand marketers are the mobile wallet, push notifications and SMS. Surprisingly, the channel most internet users want to be communicated with for loyalty programs is also among the least used channel by brand marketers.

SMS is likely the preferred channel for consumers because not only is opting in easy, but they don't have to download a brand's app to receive app notifications. And, though opting in to a loyalty program via email is easy as well, SMS is a more direct push notification, and won't get lost in someone's inbox like email might.

Overall, US marketers plan to invest more in loyalty programs by 2017, a survey from multichannel loyalty and analytics company CrowdTwist, in partnership with Brand Innovators, found. More than half of respondents said they plan to put more dollars into their loyalty programs next year. And almost half of all respondents said they will somewhat increase loyalty budgets. Meanwhile, a mere 4% said they anticipate lowering investment.

### Preferred Channel for Receiving Loyalty-Related Communications from Brands According to US Internet Users, March 2016

% of respondents



Note: numbers may not add up to 100% due to rounding  
Source: 3Cinteractive, "2016 Mobile Loyalty Report," June 29, 2016

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### Mobile Channels Used for Their Loyalty Program According to US Brand Marketers, March 2016

% of respondents



Source: 3Cinteractive, "2016 Mobile Loyalty Report," June 29, 2016

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# To Have a Killer Loyalty Program, Retailers Need to Think Big

## Just because a consumer joins a loyalty program doesn't mean she's active in it

Loyalty programs have become an important marketing tool for retailers, and most companies entice shoppers to join these programs by offering rewards. But these incentives may not be enough to keep consumers satisfied and happy that they joined it in the first place. Retailers may need to think bigger, and more long-term.

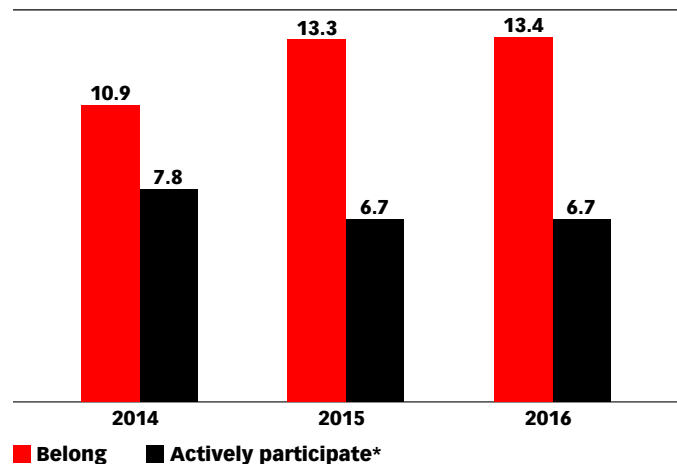
Just because a consumer joins a company's loyalty program doesn't mean she's active in it. Research from Bond Brand Loyalty, in partnership with Visa, found that the average internet user in North America belongs to about 13 loyalty programs for companies in various industries. Yet members are only actively participating in about half of the initiatives they have signed up for.

Perhaps consumers feel they aren't getting enough out of some loyalty programs to continually participate in them, and retailers may need to change that. Some already have.

Take Sephora for example. The retailer's loyalty program has an immense following, especially among beauty junkies. The program is simple: consumers who are interested start off at the Beauty Insider level, which is free to join—and every dollar spent earns them a point. VIB is the next level, and shoppers need to spend a minimum of \$350 annually to reach it. Sephora's VIB Rouge membership is its most elite, and to reach that, consumers would have to spend a minimum of \$1,000 annually. As consumers climb further up the ladder to VIB Rouge status, they are met with more exclusive rewards like a private hotline and invitations to exclusive events.

And although Sephora has been successful with its loyalty program, the retailer has taken things a step further. Sephora recently introduced its Rewards Bazaar, where loyalty program members have access to new rewards—including samples, services and one-of-a-kind experiences—every Tuesday and Thursday. Some of these rewards include customer makeovers, which barely cost the company anything since their in-house makeup artists perform them. Other rewards are more high-end and

**Average Number of Loyalty Programs to Which US Internet Users Belong vs. Actively Participate\*, 2014-2016**



Note: \*made a purchase in the past 12 months  
Source: Bond Brand Loyalty, "The 2016 Bond Loyalty Report" in collaboration with Visa, June 7, 2016

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**Leading Reasons for Joining, Participating in and Leaving Loyalty Programs According to US Internet Users, Aug 2015**  
% of respondents

### Joining

#### Earning points/miles on purchase

56%

#### Product or service offer/discount

55%

### Participating

#### Easy to understand

81%

#### Rewards and offers are relevant to me

75%

### Leaving

#### Did not provide rewards/offers that interest me

56%

#### Too hard to earn points for rewards

54%

Note: ages 18+; programs joined in the past 12 months; only the top 2 responses in each category are shown  
Source: Colloquy, "Customer Loyalty in 2015 & Beyond: Are you Wasting Your Money?" Oct 14, 2015

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limited, like a master makeup class at Anastasia Beverly Hills, or a Tory Burch gift set that includes a bag, wallet and perfume, among other things.

An initiative such as this—basically surprising and delighting customers—can boost brand perception. And an influx of rewards, especially those that are more tailored and personalized, can keep loyalty program participation going. A survey from loyalty marketing research and education practice Colloquy found that more than half of respondents who had joined a program in the past 12 months did so because they were able to earn points or miles on their purchases. Nearly as many had received a product or service offer. And 75% of respondents said they stayed in the loyalty program because the rewards and offers were relevant to them.

On the whole, the majority of US marketers intend to allocate more of their budgets to customer loyalty next year, research from multichannel loyalty and analytics company CrowdTwist and Brand Innovators revealed. In addition, about 13% said they anticipate significant increases in spending on such programs.

According to the data, more than half of respondents said they plan to put more dollars into their loyalty programs next year. Some 44% said they will somewhat increase loyalty budgets, and 13% plan to significantly. Only a mere 4% said they anticipate lowering investment.

## Loyalty Programs May Sway Big-Box Store Shoppers this Holiday

### Consumers are taken with SMS for coupons, rewards

Holiday shopping will soon be in full swing. According to August research, more than half of US internet users feel that loyalty programs will affect whether they shop at a big-box store or not for the holidays.

Berkeley Research Group (BRG) surveyed 1,026 US internet users ages 18 and older about what influences their holiday shopping decisions.

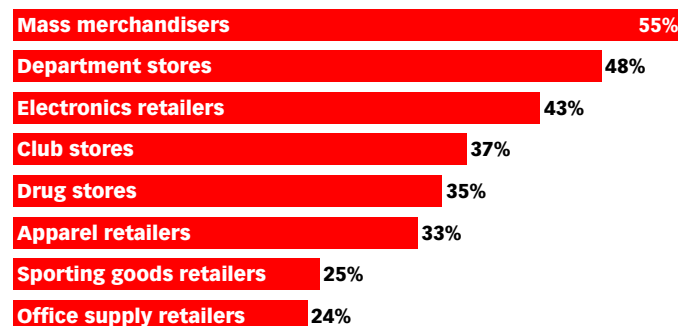
According to the data, 55% of respondents said rewards programs will affect their decision as to what mass-market retailer to shop at this holiday season. Not too far behind were department stores (48%) and electronics retailers (43%). Meanwhile, only about one-quarter of those polled felt these types of program would be meaningful for retail categories like sporting goods and office supplies.

With digital's increased presence within retail strategy these days, direct mail, and even email, are no longer the only way to deliver holiday pre-sale notices and Black Friday deals to their most loyal customers. In a separate March 2016 survey from 3Cinteractive, roughly half of US internet users said they prefer receiving loyalty-related

communication from brands via SMS rather than email, app notifications or direct mail.

While the upcoming holiday season will likely see a sales boom for retail ecommerce as it did in 2015, total retail sales is forecast to see another minor gain. According to eMarketer numbers, retail ecommerce holiday season sales are pegged for 13.3% growth this year, while overall retail holiday sales are anticipated to increase by a mere 1.8%.

#### US Internet Users for Whom Loyalty Programs Will Be Influential When Deciding Where to Shop During the 2016 Holiday Season, by Retailer Type % of respondents



Note: ages 18+  
Source: Berkeley Research Group (BRG), "Retail Perspective - Precision Needed To Beat Mediocre Outlook," Aug 18, 2016

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# What It Means to Bring Loyalty to Mobile Wallets

## Internet users expect to earn, share and spend points via mobile wallets

Marketers are investing more in loyalty programs, and one way to boost their profile is to include them in mobile wallet apps. According to June research, internet users almost universally expect to be able to exchange points across programs within their mobile wallet—and that's not all they want.

Mobile wallet loyalty provider Points polled 1,500 US internet users ages 18 and older in two separate surveys during April and June 2016. All respondents were familiar with mobile wallets and were a member of at least one loyalty program.

Respondents wanted the loyalty capabilities within mobile wallets to be convenient. Some 61% said they wanted to be able to redeem points or miles to pay for purchases directly from their mobile wallet, and nearly the same number said they wanted to be able to access all active loyalty programs through one app.

Since users are accessing these loyalty capabilities within a mobile device, it's not surprising that 53% of respondents said that they would like to earn points or miles in their favorite programs with every mobile payment they make. And another 53% said they want to be able to receive notifications when their balance is high enough to redeem rewards.

Loyalty programs are becoming integral for many marketers. In fact, research from multichannel loyalty and analytics company CrowdTwist, in partnership with Brand Innovators, indicates that the majority of US marketers intend to allocate more of their budgets to customer loyalty programs next year. About 13% said they anticipate significant increases in spending on such programs.

### Loyalty Capabilities that US Internet Users Want to See in a Mobile Wallet, June 2016 % of respondents

#### Exchange miles/points between different programs

94%

#### Redeem points/miles to pay for purchases

61%

#### Access all active loyalty programs through one app

60%

#### Track points/miles balance

57%

#### Earn points/miles in favorite programs with every mobile payment

53%

#### Receive notifications when balance is high enough to redeem rewards

53%

*Note: ages 18+ who are familiar with mobile wallets and belong to at least 1 loyalty program*

*Source: Points, "The State of Mobile Wallet Loyalty and Engagement in 2016," Oct 17, 2016*

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# How Gamification Can Bring Your Loyalty Program Back to Life



**Ankit Shah**

*Managing Director and Partner*

**Dopamine**

From a consumer perspective, loyalty programs offer the same run-of-the-mill experiences, and the rewards have become less meaningful over time. Gamification can help by making each member's journey unique. eMarketer's Yory Wurmser spoke with Ankit Shah, managing director and partner of gamified experience agency Dopamine, about how gamification can revive loyalty programs and speak to consumers' values.

**eMarketer:** Are today's loyalty programs meeting consumers' expectations?

**Ankit Shah:** Loyalty programs have become more and more ineffective over time. They've evolved to a state where they're generically cookie cutter. They're seemingly offering the same expectations, promotions and reward structures for the same transactions. There's no differentiation. They've inherently become part of the purchasing process without adding value for the consumer. Low tiers of loyalty are easily achieved nowadays, but the higher tiers—building real loyalty and real engagement with the brand or product—have become exponentially harder.

**eMarketer:** What's the definition of gamification in the context of loyalty marketing?

**Shah:** Gamification is the utilization of game concepts in nongame environments. Broadly speaking, it's the ability to shift human behavior using not only best practice schemes but also the rule sets, environment and behavioral management found inherently in games. This is about behavior and habits.

Games want the consumer to habituate. They're created to influence flow. Games inherently build you into an environment or a structure where progress is always possible and you have to move forward.

**"Games inherently build you into an environment or a structure where progress is always possible and you have to move forward."**

**eMarketer:** How does gamification make loyalty programs more fulfilling for consumers?

**Shah:** One member has the same journey as everybody else who has the loyalty program. Games, on the other hand, feel unique. They create components that wrap around you and understand you. Consumers want variable outcomes. This isn't only about transactions. It's also about the next generation of loyalty, which is nontransactional—building a relationship with a brand as opposed to creating a purchase with a brand.

**eMarketer:** How can marketers use gamification to trigger engagement outside of the transaction?

**Shah:** Marketers are starting to include gamification in loyalty programs, but they're going about it in an elementary way—they're just slapping on points and badges. They're not getting to the crux of what gamification can offer.

A lot of programs aren't fun anymore. Achievement, moving from level one to level two, from silver to gold—all of these things inherently have some fun factor. Over time, loyalty programs have been watered down and they're not as fun. When things are not as fun, they're not as engaging. And when they're not engaging, they're not as relevant to the end-user.

**eMarketer:** How does this type of engagement speak to consumers' values?

**Shah:** Gamification is everywhere. It gives people a pathway to forward progress. It plays upon their values—who doesn't like moving forward with their life? Who doesn't like achievement? Who doesn't like thinking that their actions matter? Most people's inherent value is to do better in life in whatever way, shape or form possible. Gamification can be an effective tool to help mobilize that.

**"Loyalty needs to be fun. It needs to help you create that sense of accomplishment and progress and give meaningful feedback."**

**eMarketer:** What's a good example of gamification for customer loyalty?

**Shah:** One that's super popular is Starbucks Rewards, both from the card base and the Starbucks app. Both do an incredible job of driving people back into Starbucks stores and incentivizing them in such a way that if they're on the fence about getting a cup of coffee that day, they'll go simply to add to their Starbucks point total. They do a good job of showing development and accomplishment as well as ownership and possession. Members receive personal goods as well as virtual points.

**eMarketer:** How should marketers view gamification going forward?

**Shah:** Loyalty needs to be fun. It needs to help you create that sense of accomplishment and progress and give meaningful feedback. Most programs these days don't do that, because they're essentially the same program over and over again. As more people join them, the rewards become less meaningful.

The way to combat that, if you can't afford more spend from the brand perspective, is to up the fun or engagement factor in a variety of ways. Gamification is one of the primary tools to do so.

## Loyalty Is an Emotion, Not a Transaction



**Mark Taylor**

*Senior Vice President, Digital Customer Experience*

**Capgemini**

Without a great experience, loyalty programs are less valuable to customers and abandoned early on even if they promise discounts. eMarketer's Yory Wurmser spoke with Mark Taylor, senior vice president of digital customer experience at business and technology consulting company Capgemini, about consumers' frustrations with traditional programs and how marketers can create a compelling loyalty experience.

**eMarketer:** In what ways have consumers changed but loyalty programs haven't caught up with yet?

**Mark Taylor:** There's a transactional side to consumers, but there's also an emotional side. The transaction-based programs have always been problematic, but this is not a new phenomenon. What is new is that customers have changed their expectations, and transaction-based loyalty

programs struggle to make anything valuable for the consumer and for the company. Few of these programs survive their first year and even fewer deliver the value on either side of the equation that they are intended to deliver.

**eMarketer:** What do consumers expect?

**Taylor:** Consumer expectations are set by the Googles, the Amazons, the Zappos and the Starbucks of the world. Consumers' patience to jump through hoops to get some form of reward, which may not be valuable to them, is diminishing. The biggest consumer-side issue with a loyalty program is a lack of relevance and value. Consumers' expectations have been changed by the companies that lead with experiences. Consumers are not prepared to sacrifice some form of transactional monetary value for an experience that doesn't work for them.

**"What is new is that customers have changed their expectations, and transaction-based loyalty programs struggle to make anything valuable for the consumer and for the company."**

**eMarketer:** What is the biggest source of unhappiness in loyalty programs?

**Taylor:** The program isn't relevant to who I am. Two-thirds of loyalty programs are abandoned by consumers within the first year, because the value isn't there. Consumers look for a seamless experience with brands more than they look for future discounts. They will not trade in today's experience for tomorrow's discount.

**eMarketer:** What's an example of a loyalty program that offers relevant experiences?

**Taylor:** One example is the Special K loyalty program. How do I make you loyal to a breakfast cereal? It's a challenge as a manufacturer. The brand doesn't have that direct connection to you because it's handled through retail. You can get sales data, but it's hard to get customer data. But Special K understood that if their customer bought their cereal, some part of their personality led them to make healthier choices.

Special K established a program around healthy living. The value exchange was not about getting 30 cents off your next box of Special K. It was about content. They gave links to other products and created an opportunity for customers to learn about healthy living. They created something they believed their audience would be interested in. They extended the Special K line to other healthy eating options, and they learned a lot from their customer base. This is a great example of understanding what your customers care about.

**eMarketer:** Experiences can also be delivered through better customer service and targeted advertising. Is the utility of loyalty programs decreasing?

**Taylor:** Loyalty programs are derived from customer relationship management of the '90s, which was skewed in favor of the brand, not the customer. They were about how to cross-sell, learn more about you to sell you something else and increase the lifetime value of existing customers. All of those are good business drivers, but customers didn't find themselves in those programs.

**"Consumers look for a seamless experience with brands more than they look for future discounts. They will not trade in today's experience for tomorrow's discount."**

While loyalty is massively important, loyalty programs are less relevant. Brands today should focus on ensuring that the experience is simple and pleasurable. It can't always be pleasurable, but it can always be simple. Loyalty—not a loyalty program—is an emotional state of mind. The way to drive real loyalty is to create engagement through experiences.

**eMarketer:** Are mobile tools being used effectively to improve the experience?

**Taylor:** Retailers recognize that the mobile phone is the remote control for their customers' relationship with them. If you examine the multichannel experience, [mobile comes into play when] consumers say, 'Let me use my phone to pay you, redeem credit, comparison shop and get customer reviews while I'm in store.'

We have yet to uncover the right balance of the value exchange for consumers on mobile devices, but companies are working toward that. Starbucks, for example, integrated the loyalty experience with the whole brand experience. Once I download the Starbucks app, which I may use to pay for my purchases, the loyalty program is embedded in the overall experience. This will increasingly be the case and critical for the value exchange.

# MAKE MOBILE YOUR LOYALTY BFF

**89%** of shoppers  
like brands  
that offer loyalty programs  
within mobile apps\*

## LEARN HOW

Rewards programs  
contribute to a greater  
customer lifecycle  
experience across devices

**GET STARTED**

Loyalty programs can take many forms, from the web to mobile to in-store, but the real goal is deeper, continued engagement.

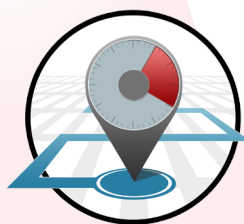
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