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e-tail detail

Superior Shopping Experiences
Compelling Merchandising and Marketing for Connected Customers

2013 Merchant Survey Results

April 17, 2013

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THE DETAILS

"Being multi-dimensional grows in importance as retailers must deliver across a rich range of devices and channels as consumer access grows," emphasizes Lauren Freedman, President of the e-tailing group. "Now more than ever, elevating the customer experience is essential for differentiation and survival with Amazon a click away for every shopper and a threat to every retailer. Striving for excellence and delivering superior personalized shopping experiences means compelling merchandising and targeted marketing to meet and exceed the expectations of today's connected consumers."

Purchase the complete 12th Annual Merchant Survey Report with 54 comprehensive charts and tables for $595 via Paypal.

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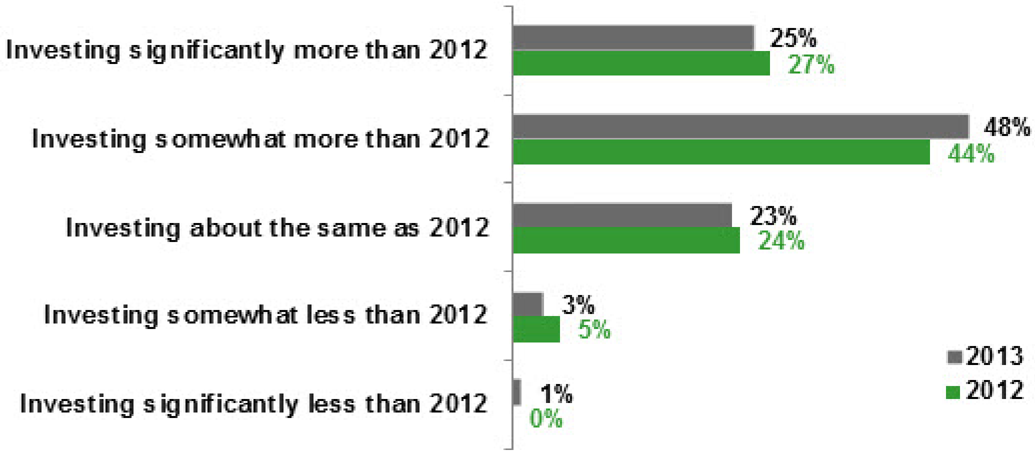
THE TRENDS

For the 12th consecutive year this comprehensive online survey was fielded in the first quarter to senior executives with responsibility for ecommerce. This year 148 respondents provided valued insights to 47 questions covering critical topics from Internet strategies to channel presence to merchandising and mobile initiatives.

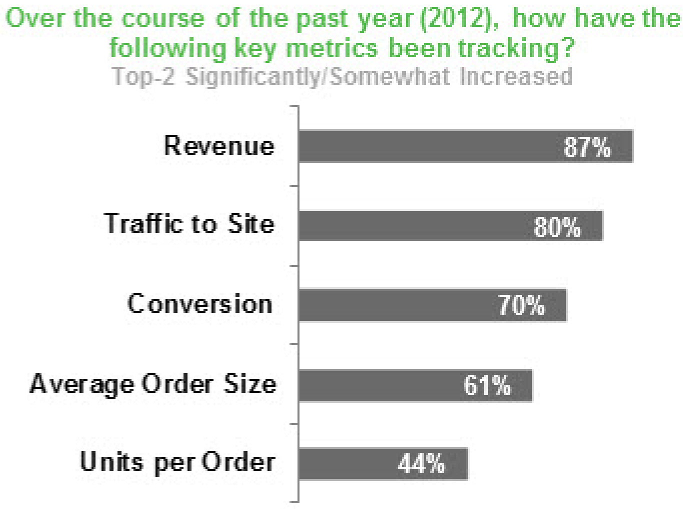
A quick look at the numbers is encouraging as investment is forthcoming with 3 out of 4 retailers investing MORE than 2012.

How will your ecommerce investments be impacted by the current economic climate?

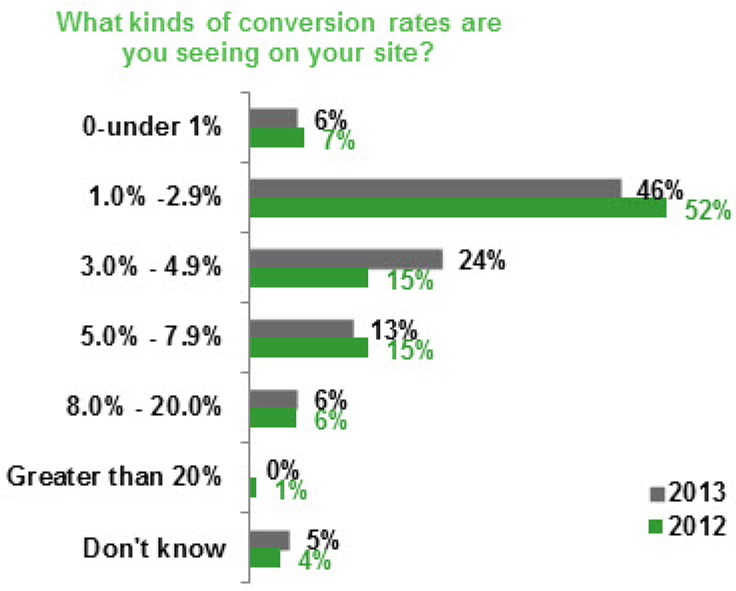


METRICS TRENDING

Key indicators are all trending upward indicating strong growth year-over-year on metrics that impact profitability. In every instance retailers report somewhat/significant increases starting with units per order for just under half while revenue gains anchor the list and almost universally increase at 87%.

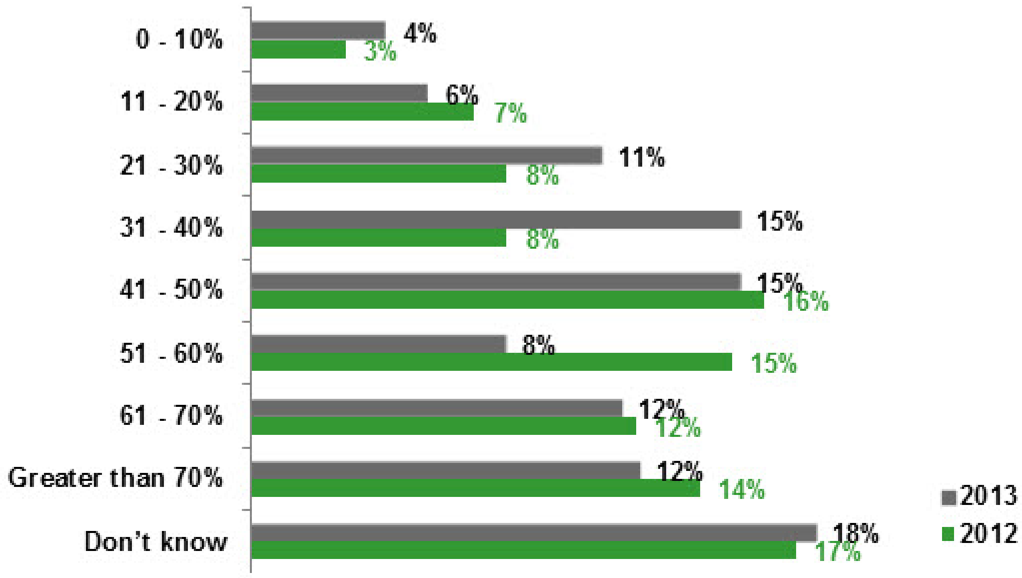


Conversion rates see movement into the 3% to 4.9% range as retailers learn the ropes where 70% cited gains year-over-year. Continued emphasis keying in on conversion should be expected given overarching customer experience direction revealed by retailers in open-ended questions for the coming year.



Shopping cart abandonment rates decline given dedicated merchant efforts. These numbers find their way into conversion stats supporting positive findings.

What are your current shopping cart abandonment rates? (abandonment is defined as the customer leaving the site having left product in the cart without completing the checkout process).



MERCHANDISING MATTERS

To gain an understanding of the value of specific merchandising tactics, 50 features were ranked on a 5-point scale: 5 being very valuable and 1 indicating not at all valuable in driving revenue and results.

Listing of Feature Ranking Very Valuable to Neutral	Top-3 2013
Keyword search	98%
Product ratings/reviews	95%
Email as a merchandising vehicle	95%
Free shipping - conditional	94%*
Seasonal promotions	93%
Cross-sells	93%
What's new	92%
Up-sells	91%
Top rated	91%*
Alternate views	91%
Top Sellers	90%
**New to Top-10*	

Charted first are the most highly valued features with a top-3 ranking of 90% or more (valuable/somewhat valuable/neutral). Top Rated and Free Shipping-Conditional move into the top 10 while Zoom and Sales/Outlet see some decline.

Additons to the 2013 review included Pinterest given the heightened interest; community's Ask & Answer and Proactive Chat which is being deployed by more retailers.

Gainers & Losers

In a world of price transparency and flash sales, it's not surprising to note that a promotional tactic like limited-hour promotions would see an 18% gain. Single digit gainers included tactics that exposed products earlier or better including quick view, color change or interactive tools while unconditional and conditional free shipping and social marketing from Twitter to social log-in all received retailer attention for their ability to drive ROI.

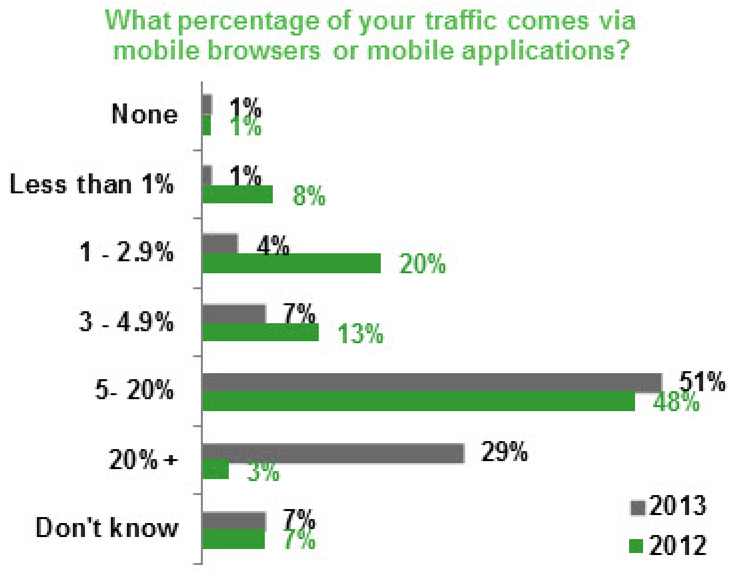
All Features High to Low %	Top-3 2013	Top-3 2012	+/-%
Limited hour promotions	70%	52%	+18
QuickView	82%	73%	+9
Color change	79%	72%	+7
Free shipping - unconditional	75%	69%	+6
Interactive tools	71%	65%	+6
Twitter marketing	66%	60%	+6
Social login	62%	56%	+6
Free shipping - conditional	94%	89%	+5
Product ratings/reviews	95%	91%	+4
Top rated	91%	87%	+4
Gift certificates/Cards	71%	67%	+4

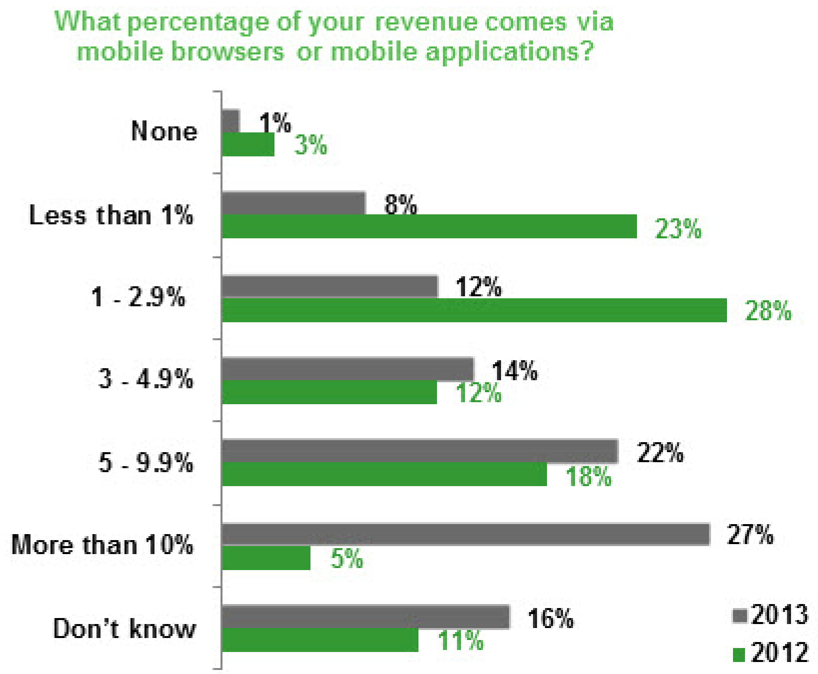
OMNI-CHANNEL EXECUTION

Personalization plays an important role where ROI and success are seen from shopping cart abandonment emails and short-term retargeting. Product page recommendations are populated by the majority of retailers on websites (56%) and via email with one in three employing retargeting and leveraging email alerts. Additionally, three out of four retailers take advantage of personalization with outsourcing outweighing in-house solutions.

MOBILE SHIFT SIGNIFICANT

Mobile investment is a split personality where just under half the retailers responding will be spending under $50K and the remaining retailers making more substantial investments. Retailers embrace a range of mobile solutions where 2 out of 3 now have mobile optimized sites and barcodes/QR codes now in place for 1 out of 2 retailers. For the majority of retailers, traffic patterns from mobile have catapulted even to double digits as they see 5-20% of their traffic coming from mobile and impressively almost 1-in-3 (29%) have exceeded the 20% mark. Based on the focus expressed for Top-3 2013 initiatives, it's understandable why mobile has catapulted to the top of the list. Even more significant is that almost 1 in 3 retailers (27%) see 10% or more revenue via mobile devices.





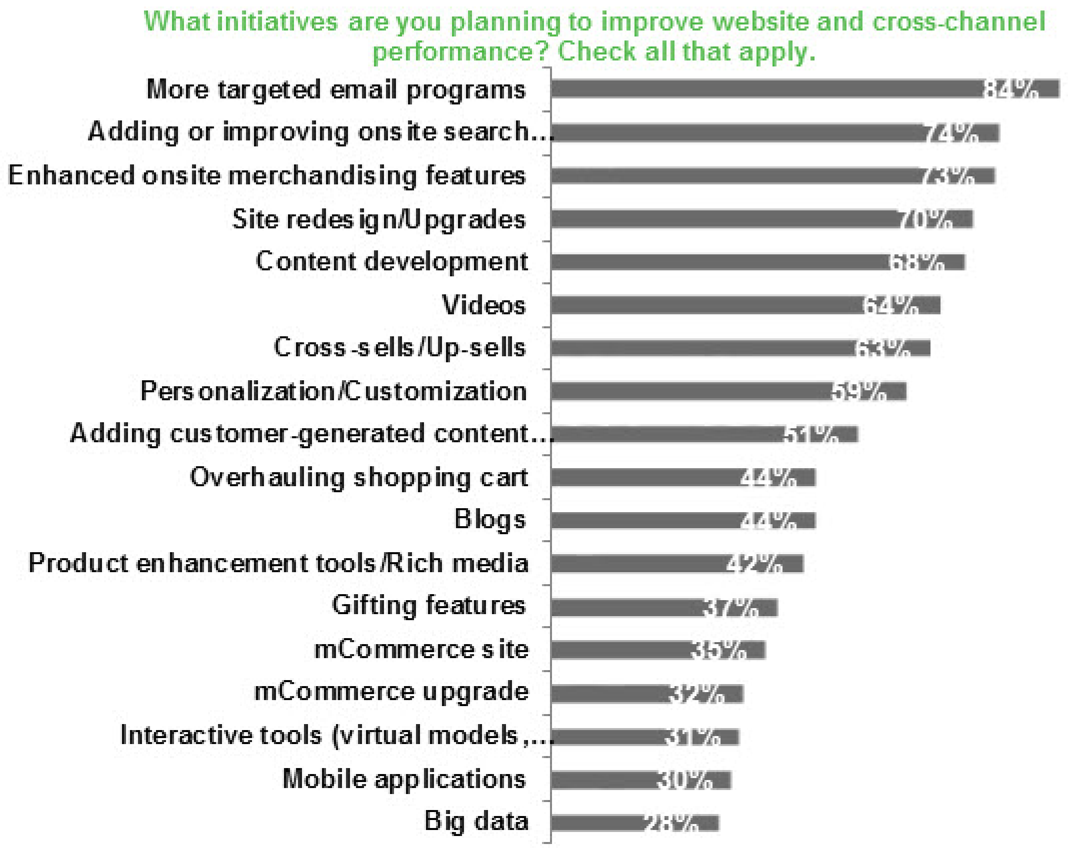
SERVING UP SOCIAL

Social tactics are universally deployed starting with Facebook. Beyond blogs all social tactics see single digit improvement where ratings/reviews top the list based on the 5-point scale: 5 being very valuable and 1 indicating not at all valuable used to assess merchandising.

SOCIAL	Top-3 2013	Top-3 2012	+/-%
Product ratings/reviews	95%	91%	+4
Sharing via social networking	89%	87%	+2
Facebook page	86%	84%	+2
"Like" on Facebook	82%	81%	+1
Pinterest	79%	na	na
Blogs	72%	78%	-6
Ask & Answer	67%	na	na
Twitter marketing	66%	60%	+6
Social login	62%	56%	+6
fCommerce	44%	51%	-7

PLANNED INITIATIVES

Prioritizing for 2013 finds ecommerce experts expressing where initiatives are planned from this list of eighteen to improve website performance. More targeted email (84%), upgrading onsite search (74%), enhanced onsite merchandising (73%) and site redesigns (70%) all are getting attention. Content development including videos continues to find traction as research behavior remains strong.



THE CHECKLIST

1. Think profitability as tactics are prioritized and positioned onsite and beyond

2. Align priorities to meet internal goals, surpassing competitors and exceeding customer expectations

3. Evaluate a range of merchandising tactics to ensure that your company delivers a superior shopping experience

4. Ensure merchandising standards are in place with superior execution and an emphasis on

category-centricity embraced

5. Monitor emerging marketing techniques while maintaining an edge of the essentials

6. Elevate mobile initiatives as customers connect and spend significantly via mobile devices

7. Extend personalization plans taking a customer-centric approach to secure greater gains

8. Test social networking strategies taking advantage of these locations to engage and acquire consumers

9. Invest in data in order to understand customer behavior making savvy merchandising and marketing decisions

10. Monitor performance and strive to differentiate your brand in today's highly competitive environment

THE COMPANY

The e-tailing group is a niche e-commerce consultancy that helps merchants deliver the right customer experience on their websites and across all of their channels while adeptly assisting technology companies to create and execute go-to-market strategies that simultaneously educate the retail community and deliver cost-effective thought leadership and lead generation.

For more background about this survey or for additional information on the e-tailing group, please contact Lauren Freedman via email to LF@e-tailing.com, by phone at 773-975-7280 or visit the e-tailing group website www.e-tailing.com.

THE STUDY

This report is a comprehensive reference source for strategy, merchandising, and marketing trends online and across channels. A compilation of responses and commentary from 147 senior executives with responsibility for ecommerce, results provide a unique overview – from the sellers' perspective, with observations and guidelines interjected from the e-tailing group, inc. based on 18 years of ecommerce and over 50+ years of retail experience.

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What's Included
• Input from ecommerce executives representing 32 major product categories being sold online
• Aggregated responses to a 47-question survey completed 1Q 2013
• 54 charts and tables for benchmarking merchandising and marketing initiatives as well as website performance

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the e-tailing group

Share the details!

1444 W. Altgeld Street, Chicago, IL 60614
T: 773.975.7280 F: 773.871.3528
LF@e-tailing.com
www.e-tailing.com