

Adobe Scene7 2011 Survey: Digital Marketing in the Next Decade

April 2011



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Executive Summary

As online technologies and consumer expectations continue to evolve rapidly, the need to keep up with these trends becomes increasingly important.

The *Adobe Scene7 2011 Survey: Digital Marketing in the Next Decade* is Adobe's fifth annual quantitative study to identify the online enhancements marketers are investing in to raise the bar on customer experience and lift conversion. Businesses worldwide were asked to pinpoint the executions they currently deploy or plan to deploy in these categories: analytics, digital advertising, mobile, personalization, rich media and merchandising and social media. They were also polled on the effectiveness of these tactics, including impact on conversion.

This year, the survey measured an additional 55 tactics, resulting in the measurement of 109. For the first time, the deployment, planned deployment and effectiveness of analytics tools, mobile commerce visualization features and digital advertising executions were measured, and to this mix, several new rich media, social and mobile tactics were added.

A record 1,941 respondents participated in this year's survey, more than triple last year's. Participants represent businesses across diverse industries and regions, with more than half representing these industries: 1) advertising and interactive agencies; 2) media and publishing; 3) computer hardware, software and services; and 4) retail. Respondents are employed by businesses headquartered primarily in North America, Western Europe and Japan.

By providing quantitative data on online business trends, we hope to inform decision-making and enable businesses to benchmark their adoption of various innovations and executions against their peers.

This report leads with findings and analyses based on aggregated global results; the appendices detail the results by each of the regions measured.

Key Finding and Conclusions

Below are findings and interpretations based on aggregated global results and comparisons of regional results.

- Fully 73% of the businesses surveyed say they plan to invest in site redesigns or would otherwise make significant enhancements to improve their site's ROI. The vast majority (82%) say they plan to deploy those enhancements within the year, up 8% from a year ago.
- Analytics, social media, and rich media/merchandising are the most deployed tactics globally, while mobile apps, social executions and rich media are among the top planned.
 - o Analytics tools for measuring and optimizing website experiences represent the most deployed tactic globally, used by 55% of the respondents. In line with last year's findings, social media and rich media tactics also rank among the most adopted. At least a quarter of all respondents have applied some executions in analytics, social media and rich media.
 - o Mobile cracks the top planned deployments for the first time since the survey first began measuring its executions in 2009, suggesting the channel is finally finding its audience after years of hype. This year, iPhone apps are the most planned deployment, cited by 27% of the respondents. It shares the top spot with interactive catalogs, which leads planned deployments for the second year in a row. Just behind are iPad apps, advertising on social networking sites and branded social community pages, each cited by 25% of the respondents.
 - o Of the deployments in the low single digits, mobile registers the highest planned execution rates. This is particularly true for Android smartphone and tablet apps. With a 4% deployment rate for Android smartphone apps, and 3% for Android tablets, their planned deployments are a respective 23% and 18%. Other planned mobile executions with planned rates around 20% include mobile-optimized websites and interactive catalogs.

Globally, the most deployed and planned executions are:

Top deployed executions	Top planned executions
Website analytics: 55%	Interactive catalogs & brochures: 27%
Branded social community pages (e.g., Facebook, Twitter) : 40%	App - iPhone: 27%
Blogs or micro-blogs: 34%	Advertising on social networking sites: 25%
Dynamic displays (banner, carousel, tabbed, grid views): 27%	App - iPad: 25%
Campaign analytics: 26%	Branded social community pages: 25%
Animation: 26%	

- Rich media and merchandising tactics maintain their top effectiveness rankings by the highest number of people rating them "very effective."¹ For the third year in a row, the features rated "very effective" by the most respondents belong to the rich media category, with multimedia product viewing (integrating images, video, Flash, audio, spin, etc.) taking the top spot, followed by videos and mobile product information.

Below are the features that drew the most "very effective" ratings (actual or expected) by respondents who have deployed or plan to deploy them:

Executions with the most "very effective" ratings
Multi-media product viewing (integrated images, video, Flash, audio, spin, etc.): 39%
Videos for merchandising, advertising and demonstration: 36%
Product information on mobile devices: 36%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy): 34%
Check inventory status, in-store or Web, on mobile devices: 34%
Visual filtering & advanced search on product features: 34%
Interactive catalogs & brochures: 34%

- Personalization features continue to be among the least deployed tactics, yet collect some of the highest "very effective" ratings from people who have deployed them or are planning to deploy them. This suggests that while marketers see the value of personalization techniques to tailor content and offers to their target audiences, they perceive hurdles to implementing personalization. The personalization tactic with the highest planned rate is geo-targeted site content at 21%, with 30% of respondents rating it "very effective."
- Social takes root across all the categories measured. In the digital advertising category, serving impressions in social networking sites ranked first as the top planned execution at 25%, while in the analytics category, tools for measuring social ROI is the top planned at 21%.
- The growth in the number of online enhancements being planned and deployed is not tracking the growth in effectiveness. Effectiveness is netting large year-on-year gains, yet deployment saw modest growth overall, and planned deployment still smaller. There are 12 executions registering year-on-year deployment growth and just two registering year-on-year planned growth. In contrast, there are 38 executions with year-on-year growth in the percentage of people rating them "very effective."
- For businesses with more than \$100 million in annual revenue, mobile and social features are top of mind in 2011.
 - o The top investment priorities focused on mobile applications, followed by branded social community presence: 1) Android phone apps (23%); 2) apps for iPads and iPhones (21%); 3) branded social community pages (18%).

¹ Effectiveness ratings are tallied for respondents who say they have deployed or are planning to deploy a feature

- o Four of the six most effective features for improving customer experience, either deployed or planned, were in the mobile category: Mobile advertising, promotions, bar-coded coupons - drive to store or Web (42%); Product comparisons on mobile devices (41%); Address book integration on mobile devices; Check inventory status - in-store or Web from mobile devices is equal with personalization engine -behavioral targeting (40%).
- EMEA drew the highest proportion of respondents (78%) saying their company planned to invest in site redesigns or would otherwise make significant enhancements to improve site ROI. Japan showed the lowest commitment at 67%, compared to North America at 73%.
- A comparison of regional results shows common ground among the top deployed executions; Japan, however, diverges when it comes to top planned and very effective executions.
 - o Among deployed tactics, website analytics is the most widely adopted across all regions, with EMEA and Japan both reaching 60% penetration rates. Other top North America and EMEA deployed tactics skew social, while Japan's top deployed tactics are dominated by both rich media and social. Blogs appear to have the most consistent deployment rates worldwide, adopted by about a third of respondents across all regions.
 - o While the no. 1 planned execution in North America is advertising on social sites (29%) and EMEA's is iPhone app (34%), the rest of these regions' top planned deployments are more biased towards rich media. Interactive catalogs represent the second most planned execution in both regions. Among EMEA's top five planned deployments are 3-D visualization and multi-media product viewing; in North America, quick looks and rollover views also made the top cut. Meanwhile, Japan's top four planned executions are exclusively mobile, with Android apps ranking no. 1 at 23%.
 - o Though Japan's top planned executions are related to mobile, the features rated "very effective" by the most respondents contains no mobile executions and are instead led by analytics that create differentiated offers based on user data (37%). In contrast, mobile executions drew the most or nearly the most "very effective" ratings for both North America and EMEA. Multimedia product viewing was no. 1 by number of people rating it "very effective", tied with videos in North America, and check order status on mobile devices in EMEA.

Analysis and Conclusions

Investments in online enhancements should continue if risks to economic recovery are low

This year's deployed and planned rates for online executions are generally within range of last year's, suggesting that investments are maintaining 2010 levels. Meanwhile, opportunities in social media and mobile are likely to continue to pressure businesses to shore up their online investments, as they seek to innovate, stay competitive and keep pace with the growing expectations of increasingly savvy online consumers.

A focus on protecting current investments

The wide deployment gap between the most adopted execution, site analytics (55%) and the next most adopted, branded social presence (40%) suggests that businesses put the highest priority on protecting their current investments by maximizing and optimizing their existing assets and executions. On average, analytics features netted 27% of respondents rating these tools "very effective", on a par with other top ranked effective categories including rich media, personalization and mobile strategies.

Social continues to draw interest; mobile accelerates

Thematically, social permeates every category measured. While executions in this area already have some of the highest deployments rates, they should gain even greater adoption as their momentum continues. Echoing last year's results, social media— most notably branded presence in social communities and blogs/micro-blogs— again find their way near the top of both deployed and planned executions. This year, branded community pages netted a 20% year-to-year growth in deployment, one of the largest gains among adopted executions.

These results underscore social's vast potential, as merchants seek to stake their claim in the social frontier. This comes as Facebook's traffic rivals that of Google's and social sites emerge as fertile ground for commerce.

Today, growing numbers of businesses are building integrated Facebook stores, encouraging fans to spread their offers virally, and exploring ways to tap users' social graphs to deliver relevant and personalized content and offers.

Mobile ready for its audience after years of hype

That mobile deployments sprung to the top of the planned deployments for the first time in this survey suggests that mobile is finally ready for prime time after years of false starts. Mobile's arrival comes on the back of strong worldwide adoption of web-enabled smartphones and tablets that can deliver the kinds of rich experiences consumers are accustomed to getting on PCs. In the last quarter of 2010, smartphones surpassed global PC shipments for the first time, according to IDC, setting the stage for mobile to become a viable marketing channel. Indeed, thanks to the fast adoption of smartphones, businesses that want to deliver differentiated, immersive mobile experiences can now do so and achieve real reach.

Interest in mobile marketing is also being accelerated by the rapid adoption of tablets, which is opening new possibilities for innovative mobile experiences. And further fueling the interest in mobile is Android's recent surge, an event that gives marketers another platform besides Apple's on which to build a rich, branded mobile presence.

ROI mixed for social and mobile

Social and mobile's effectiveness and ROI appear mixed, as marketers try to get their arms around these new channels. While a majority (58%) of the respondents say social has a positive impact on conversion, social features garnering the most "very effective" ratings remain those more mature and proven tactics like customer reviews and ratings. In fact, unchanged for the last three years, the social features that drew the most "very effective" votes this year are user comments/reviews, and user ratings and rankings, cited as "very effective" by 32% of the respondents. And for all its popularity as a planned and deployed execution, branded social community presence has yet to live up to the hype in terms of effectiveness. The percentage of respondents rating this tactic "very effective" was 26%, the average for all features measured.

Mobile scored the lowest votes (43%) in terms of positive impact on conversion (50% checked 'Not Applicable'). Still, there are signs of high expectations: Even though most mobile executions are not out of the gate, providing mobile users with access to product information and product inventory data received "very effective" ratings from the second and third largest number of respondents, at 36% and 34%, respectively.

Social and mobile tactics poised to be adopted quickly by small businesses

Despite the mixed outlook on social and mobile's effectiveness, that these tactics are among the most planned deployments suggests that small businesses are bypassing tools like site analytics, universally deployed by large businesses. Instead, smaller businesses are eyeing leading-edge tactics in social and mobile as a fast-track to reaching users and converting them.

Interactive catalogs, a big standout

Interactive catalogs are emerging as a major bright spot in this year's survey. Apart from their no. 1 ranking as the top planned vehicle across the board, interactive catalogs are also the no. 1 planned deployment in the mobile commerce visualization category. As well, they have drawn high ratings for effectiveness, taking the no. 4 spot, by number of people who rated it "very effective".

The growing adoption of mobile tablet devices, spawned by the success of the Apple iPad, is creating new opportunities for catalog publishers and will duly stoke greater interest in this vehicle. The advent of the always-connected tablet will enable catalog marketers to engage shoppers as never before, leveraging video and audio, providing direct links to commerce sites and promoting content sharing via Facebook and other viral sharing tools.

Japan lags peers in deployed and planned executions

While EMEA and North America generally show similar deployment levels for many of the features measured, Japan continues to lag these regions particularly in the adoption of social and rich media tactics. Japan, however, is significantly ahead in certain mobile-related applications, including QR codes and commerce

enablement, as well as mobile analytics. EMEA has a marked lead in other analytics deployment, including 1:1 testing and campaign measurement.

Across every metric, EMEA appears the most aggressive, particularly for showing the highest planned rates for many features across every category. Japan, however, lags its Western peers in every category, with mobile being the only category yielding some planned deployments above 20%. This squares with Japan's status as one of the world's most advanced mobile markets where mobile Internet services are widely used, with estimated subscription rates of 3G services exceeding 95%.

In line with EMEA's comparatively bullish planned rates, proportionally more respondents from this region also accorded 'very effective' ratings to more features than their peers.

Other year-over-year trends

The mix of top deployed executions would not have changed much from last year were it not for the new executions we sought to measure this year. For instance, where audio, RSS drew high deployed rates last year, the popularity of viral executions, including Facebook Like and social sharing tools, edged them lower this year. Similarly, mobile apps elbowed out last year's top planned features, including personalization by zip code/geo-targeted sites and personalization engine/behavioral targeting.

In line with last year's results, rich media tactics are among the most deployed and effective, suggesting that some of them are on a maturing path. Nonetheless, there remains room for innovation, as emerging tools such as virtual fitting rooms and 3D visualization remain largely untapped.

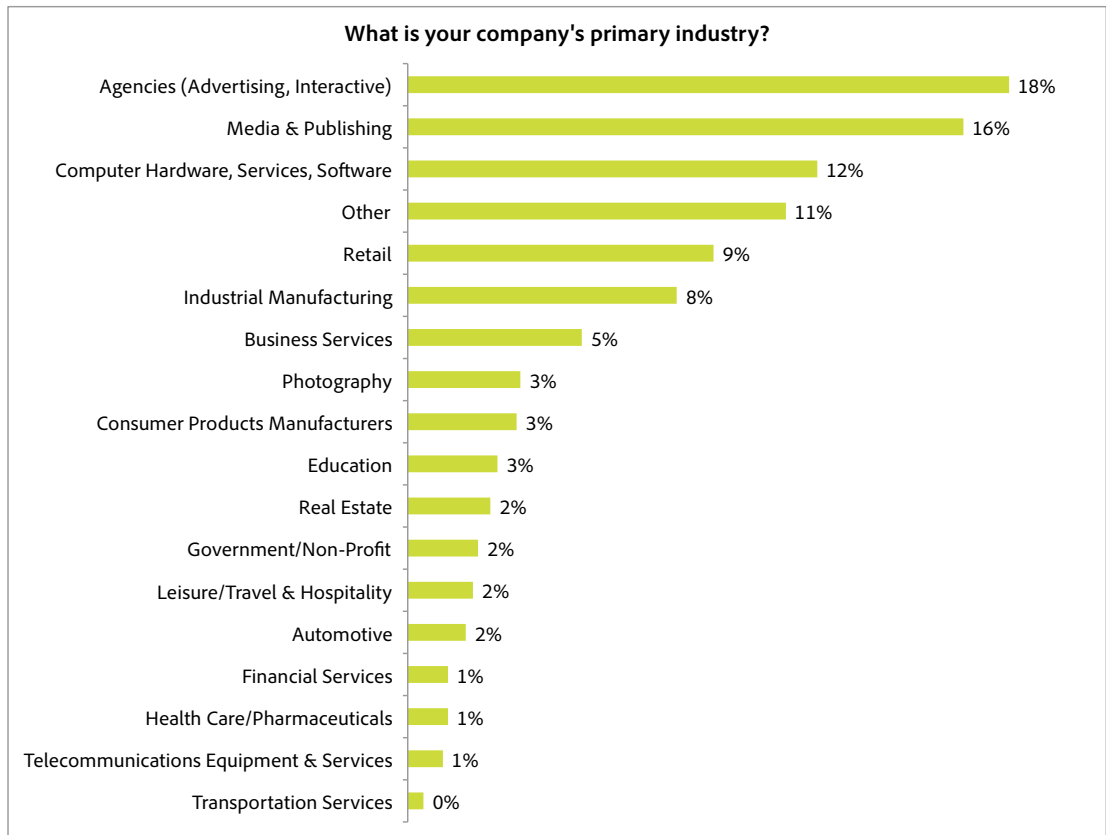
Methodology and Participants

The *Adobe Scene7 2011 Survey: Digital Marketing in the Next Decade* is an online survey distributed between December 8, 2010 and February 2, 2011 to worldwide subscribers of Adobe communications and trade publications as well as members of trade associations.

The results of this study were compiled based on responses from 1,941 people representing businesses headquartered primarily in North America, Western Europe and Japan. The majority of the respondents are based in North America. This year saw a tripling of respondents from last year, drawing the most participants ever since the annual survey began in 2006.

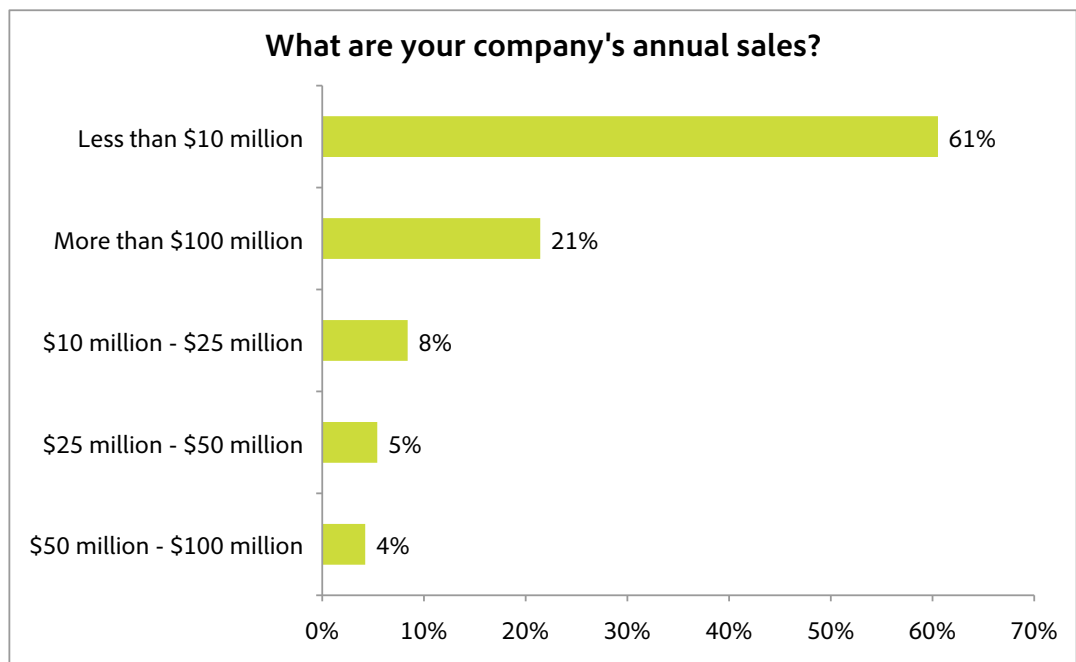
Primary Industries

The top industries represented by this year's participants tracked last year's, comprising of advertising and interactive agencies, media and publishing, computer hardware, software and services, and retail.



Annual Sales

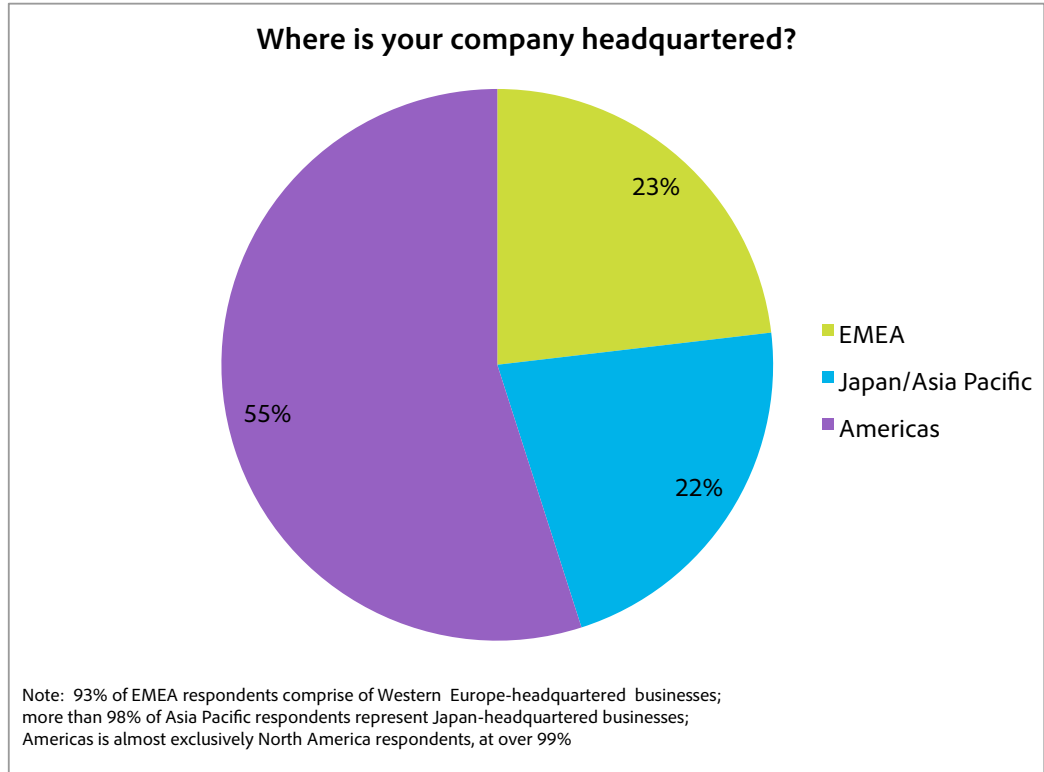
Nearly a third of respondents represent businesses with more than \$25 million in annual sales.



Regions

Compared with last year, respondents representing North America-headquartered businesses rose by about 15 percentage points; in turn, proportionally fewer respondents from EMEA and Asia Pacific participated in this year's survey.

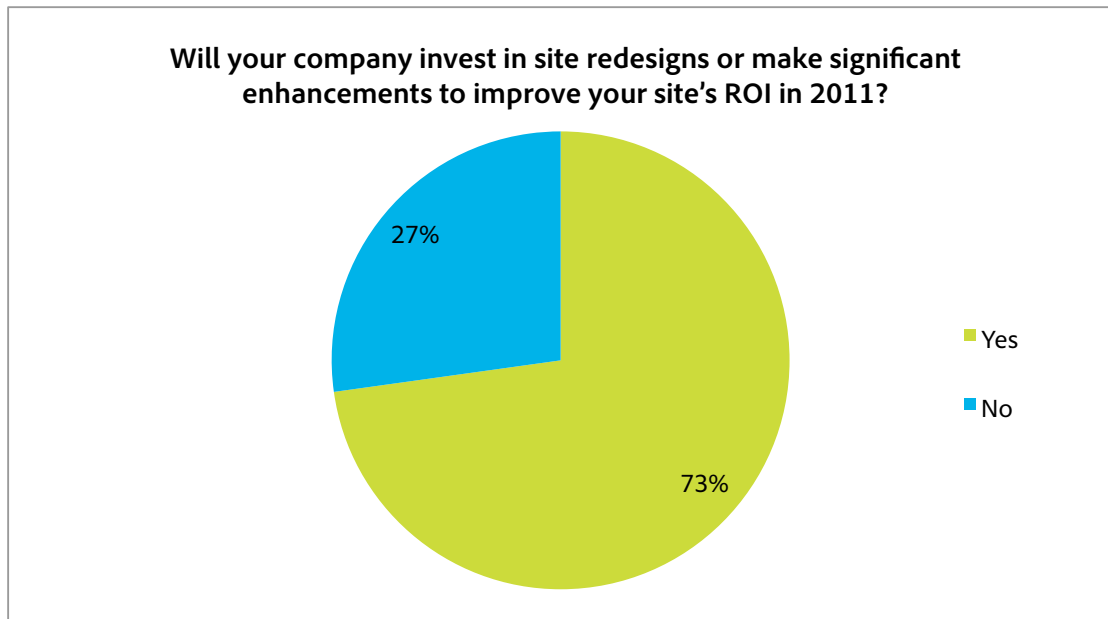
The survey was distributed to employees of businesses headquartered in the Americas, Asia, Europe, Middle East and Africa. More than 90% of those who responded are employees by businesses headquartered in North America, Japan or Western Europe.



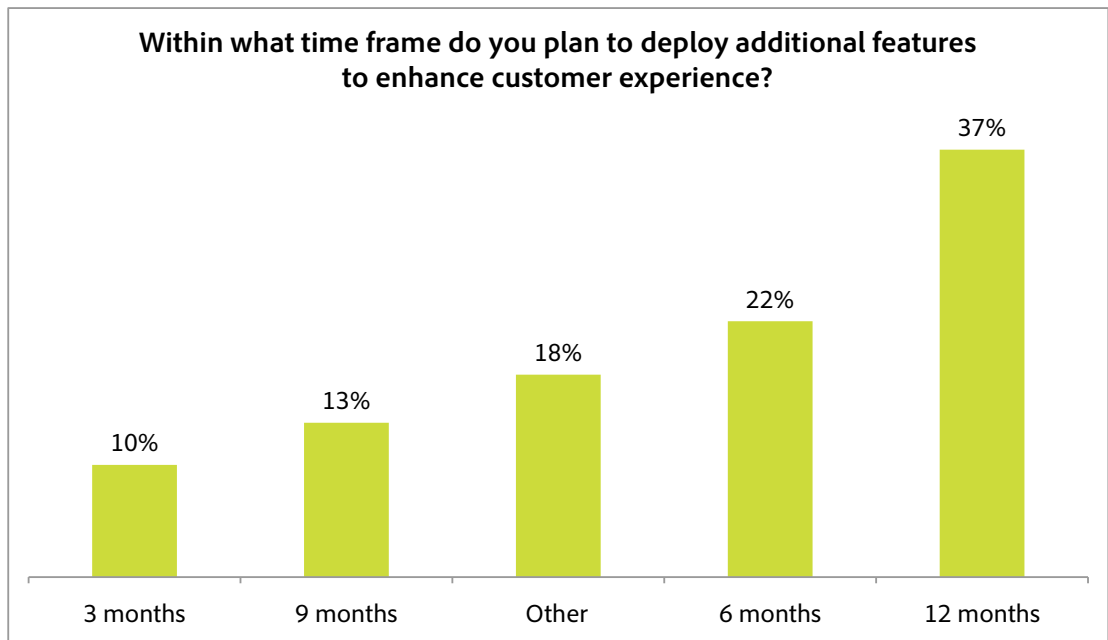
Worldwide Survey Results

This section begins with a summary of top-line results, followed by detailed findings and analyses for each tactical category measured and regional comparisons.

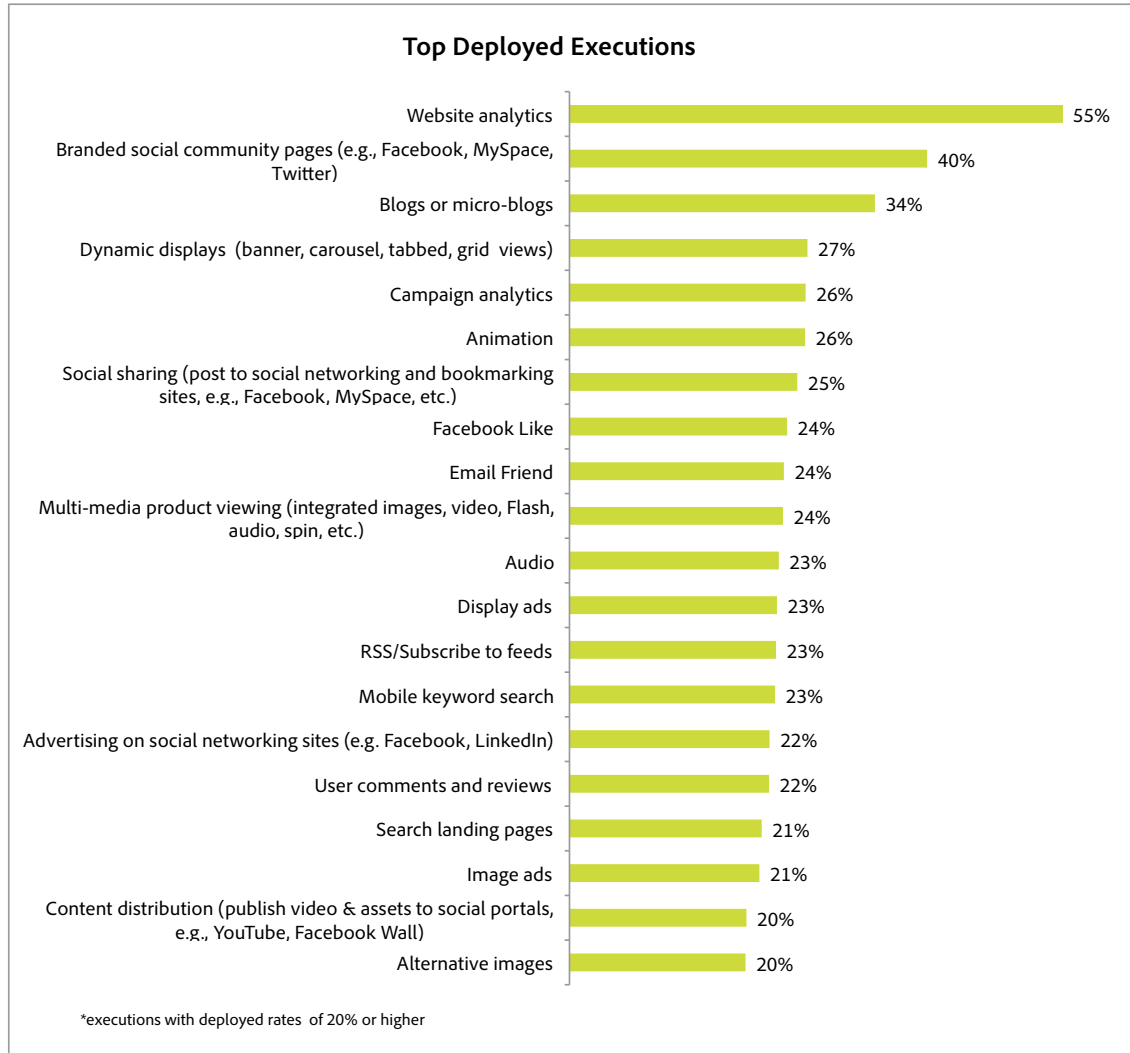
Among survey respondents, 73% say they plan to invest in site redesigns or would otherwise make significant enhancements to improve their site's ROI in 2011.



The vast majority (82%) say they plan to adopt the enhancements this year, up 8% from a year ago.



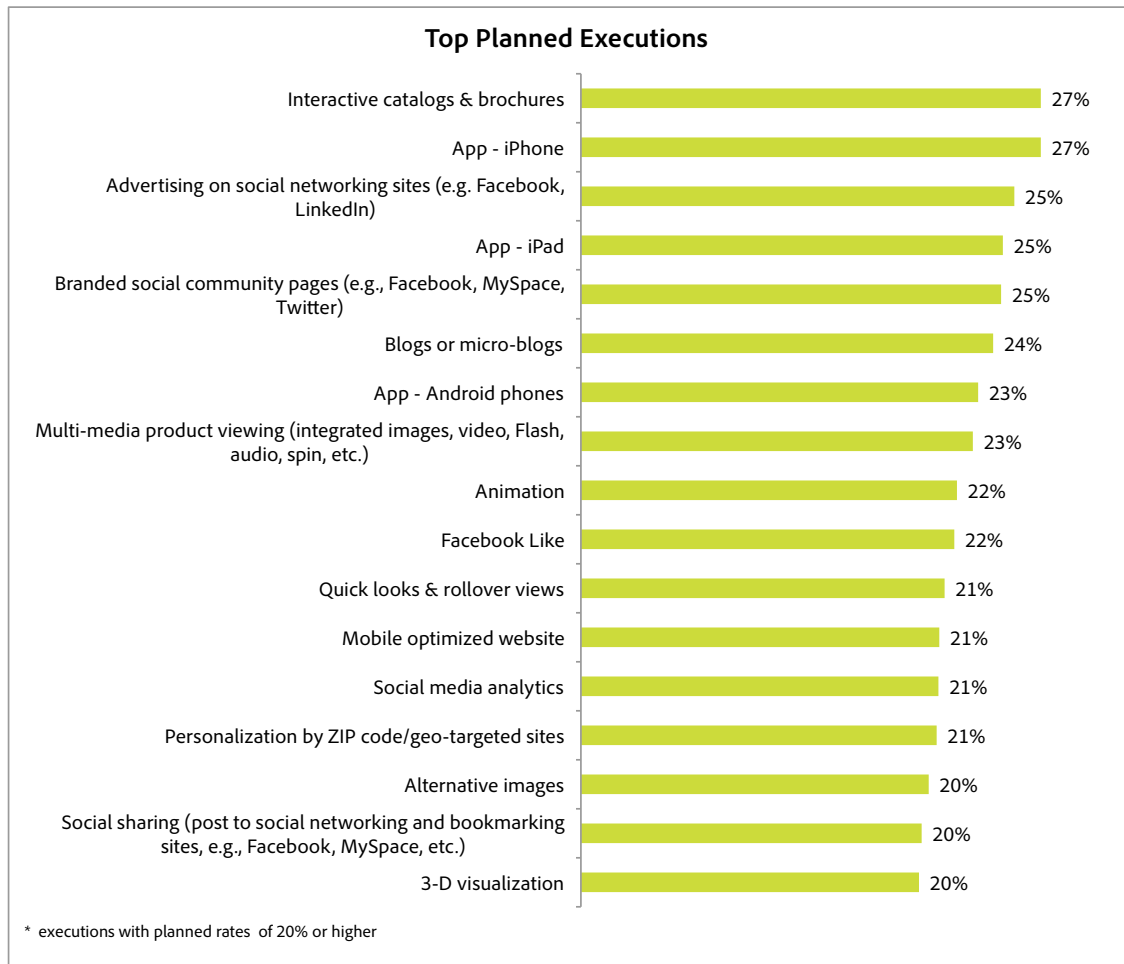
Deployed/Planned/Most Effective Online Tactics & Executions



Other deployed executions	
Text ads	19%
Quick looks & rollover views	19%
Color swatching/colorizing	19%
Interactive catalogs & brochures	18%
Social media analytics	18%
Videos for merchandising, advertising and demonstration	18%
Zoom	17%
Mobile product information	16%
Landing page testing	15%
Mobile social sharing	14%
User ratings & rankings	14%
Microsites/brand boutiques	14%

Other deployed executions	
Mobile check order status	13%
App - iPhone	12%
Interactive design tools	12%
Mobile catalogs & brochures	11%
Mobile optimized website	11%
Personalization by ZIP code/geo-targeted sites	11%
A/B testing	11%
Podcasts or live video feed	11%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	11%
Product comparisons	10%
Live chat/instant messaging	10%
Lifestyle imagery (in room, on model)	10%
Mobile analytics	10%
Mobile reviews/ratings	9%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	9%
Check delivery status on mobile device	9%
Rich media ads	9%
QR Codes	9%
App - iPad	9%
Mobile check inventory status - in-store or Web	9%
Personalized stores (with My Account, profile, favorites)	8%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	8%
Retargeting/Remarketing	8%
Hosting own video portal (user-generated and company content)	8%
Side by side comparisons	8%
Mobile alternative images	8%
360-degree spin	7%
Collaborative custom product design (items, sets, outfits, etc.)	7%
Segmented testing	7%
Mobile videos - progressive download	7%
Mobile Web ads	7%
Mobile address book integration for mobile	7%

Planned Executions

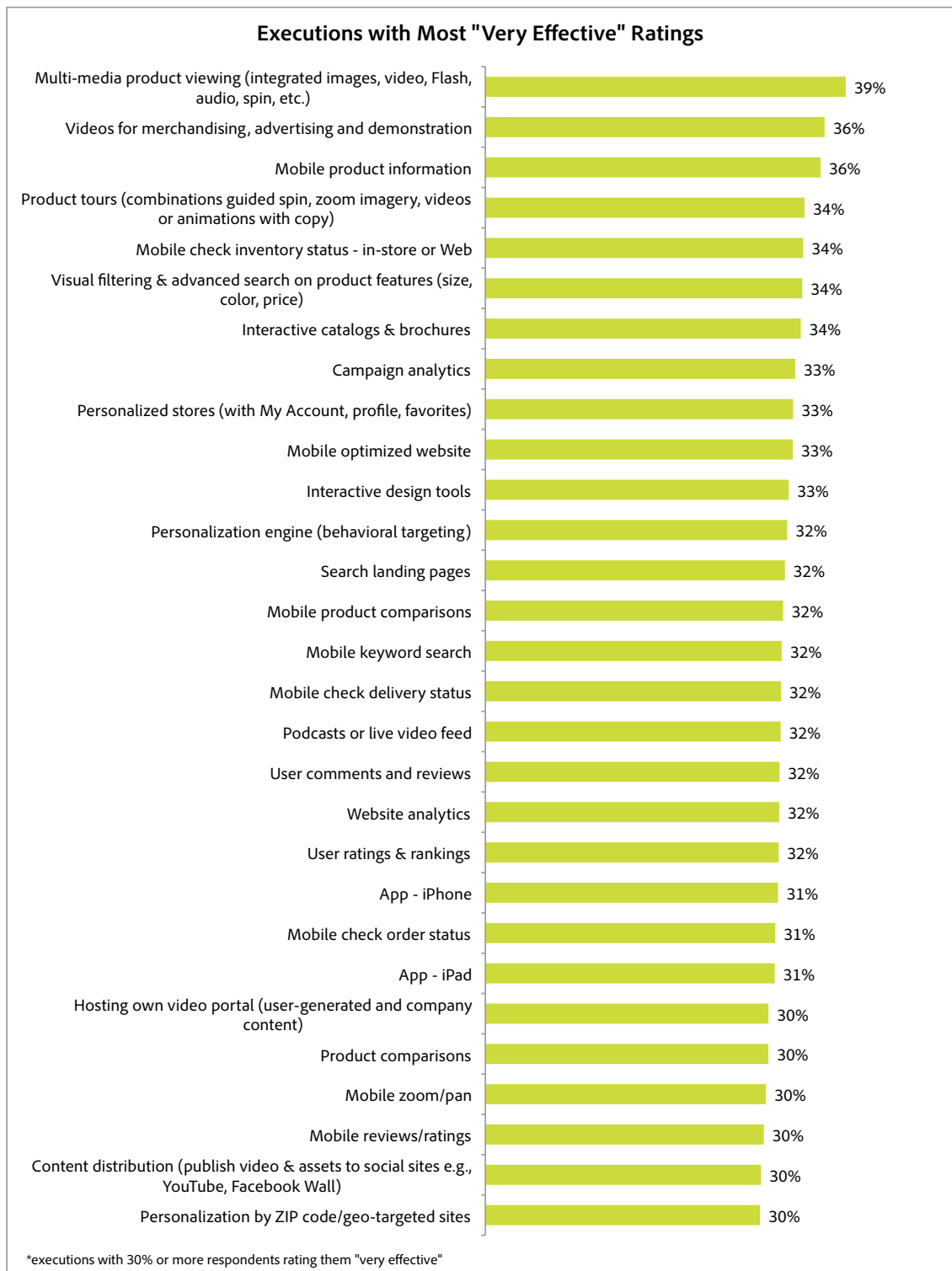


Other planned executions	
User comments and reviews	19%
Videos for merchandising, advertising and demonstration	19%
Mobile catalogs & brochures	19%
Audio	19%
Dynamic displays (banner, carousel, tabbed, grid views)	19%
Podcasts or live video feed	19%
Website analytics	18%
Interactive design tools	18%
App - Android tablets	18%
Mobile social sharing	18%
360-degree spin	18%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	18%
Search landing pages	17%
Zoom	17%
User ratings & rankings	17%

Other planned executions	
Personalization engine (behavioral targeting)	16%
Display ads	16%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	16%
App - other phones/tablets	16%
Email Friend	15%
Product comparisons	15%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	15%
Mobile keyword search	15%
RSS/Subscribe to feeds	15%
Image ads	15%
Landing page testing	15%
Color swatching/colorizing	15%
Mobile analytics	15%
Mobile videos - live streaming	15%
Microsites/brand boutiques	14%
Mobile zoom/pan	14%
Mobile alternative images	14%
Hosting own video portal (user-generated and company content)	14%
Side by side comparisons	14%
Desktop widgets	14%
Personalized stores (with My Account, profile, favorites)	14%
Mobile address book integration for mobile	14%
Mobile app ads	14%
Mobile Web ads	13%
Campaign analytics	13%
Mobile videos - progressive download	13%
Differentiated offers based on profile or demographic data	13%
Check delivery status on mobile device	13%
Text ads	13%
Live chat/instant messaging	13%
Mobile multi-media (zoom, spin,videos or animations)	13%
User-generated visual content (images, video, audio)	13%
Visual filtering & advanced search on product features (size, color, price)	13%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	13%
Dynamic Optimization	13%
Mobile check order status	12%
Retargeting/Remarketing	12%
Mobile click to call	12%
Catalogs optimized for mobile	12%

Other planned executions	
Rich media ads	12%
Mobile 360-degree spin	12%
Mobile rich media visualization	12%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	12%
A/B testing	12%
Mobile product comparisons	12%
Lifestyle imagery (in room, on model)	12%
Mobile GPS and map integration/store locator	12%
Mobile product information	12%
Mobile reviews/ratings	12%
Wikis	12%
Collaborative custom product design (items, sets, outfits, etc.)	12%
Predictive modeling	11%
Mobile check inventory status - in-store or Web	11%
Mobile custom product design	11%
QR Codes	11%
Commerce enablement - shop & buy on mobile device	10%
Mix and match	10%
1-to-1 testing	10%
Segmented testing	10%
Visual product configurators (custom products)	10%
SMS/MMS	10%
Multivariate testing	10%
Mobile gift/wish list registries	10%
Co-shopping & browsing online with an expert or friends	10%
Shop by outfit, room or collection	10%
User-designed merchandise available for purchase	10%
Mobile color swatching/colorizing	10%
User-created collections for sharing & purchase (e.g., outfits, furniture)	9%
Mobile check-in rewards	9%
SMS/MMS ads	9%
Mashups	9%
Mobile price check - Web to store	8%
Virtual fitting room	8%
Visual monogramming & engraving tools	8%
Mobile shop by outfit, room or collection	7%
Mobile mix and match coordinates	7%

Executions drawing the most 'very effective' ratings



Other executions garnering 'very effective' ratings

Live chat/instant messaging	29%
Mobile Rich media visualization	29%
Mobile multi-media (zoom, spin, videos or animations)	29%

Other executions garnering 'very effective' ratings	
Differentiated offers based on profile or demographic data	29%
Social sharing (post to social networking and bookmarking sites, e.g., Facebook, MySpace, etc.)	29%
A/B testing	29%
Alternative images	29%
Zoom	29%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	29%
Collaborative custom product design (items, sets, outfits, etc.)	28%
1-to-1 testing	28%
Catalogs optimized for mobile	28%
App - Android phones	28%
Mobile catalogs & brochures	28%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	28%
Commerce enablement - shop & buy on mobile device	27%
Mobile videos - live streaming	27%
Side by side comparisons	27%
Lifestyle imagery (in room, on model)	27%
Landing page testing	27%
User-generated visual content (images, video, audio)	27%
Branded social community pages (e.g., Facebook, MySpace, Twitter)	26%
3-D visualization	26%
Mobile social sharing	26%
Quick looks & rollover views	26%
Mobile price check - Web to store	26%
Microsites/brand boutiques	26%
Social media analytics	26%
Retargeting/Remarketing	26%
Mobile alternative images	26%
Dynamic Optimization	26%
Dynamic displays (banner, carousel, tabbed, grid views)	26%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	26%
Animation	26%
Mobile 360-degree spin	26%
Address book integration for mobile	25%
Visual product configurators (custom products)	25%
User-designed merchandise available for purchase	24%
Color swatching/colorizing	24%
Mobile GPS and map integration/store locator	24%
App - Android tablets	24%

Other executions garnering 'very effective' ratings	
Predictive modeling	23%
Mobile color swatching/colorizing	23%
Mobile analytics	23%
Mobile videos - progressive download	23%
Rich media ads	23%
Shop by outfit, room or collection	23%
Mobile click to call	22%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	22%
User-created collections for sharing & purchase (e.g., outfits, furniture)	22%
Audio	22%
Facebook Like	22%
Visual monogramming & engraving tools	22%
Mobile custom product design	22%
Mobile check-in rewards	22%
Blogs or micro-blogs	21%
Mobile shop by outfit, room or collection	21%
Segmented testing	21%
App - other phones/tablets	21%
360-degree spin	21%
Multivariate testing	20%
Image ads	20%
Co-shopping & browsing online with an expert or friends	19%
Mobile app ads	19%
Mobile Gift/wish list registries	19%
Mobile Web ads	19%
Email Friend	19%
Display ads	19%
SMS/MMS	18%
Mix and match	18%
Virtual fitting room	17%
Wikis	17%
Mobile mix and match coordinates	16%
Text ads	16%
SMS/MMS ads	15%
Desktop widgets	15%
RSS/Subscribe to feeds	15%
QR Codes	14%
Mashups	12%

Year-over-Year Trends

Mobile, personalization and rich media executions saw year-over-year growth across either deployment, planned deployment, effectiveness or all of the above. Below are some tactics showing the largest percentage gains for each metric: Deployed, Planned and Very Effective. Details for each category's gainers can be found further below.

Deployed Tactics

Branded social community pages, +20%

Mobile check inventory status, in-store or Web, +19%

Personalization by ZIP code/geo-targeted sites, +16%

Mobile commerce enablement - shop & buy, +13%

Mobile advertising, promotions, bar-coded coupons - drive to store or Web, +13%

Planned Tactics

Quick looks & rollover views, +13%

"Very Effective" Tactics

Mobile commerce enablement - shop & buy, +124%

Visual monogramming & engraving tools, +110%

Predictive modeling, +98%

User-designed merchandise available for purchase, +74%

Interactive design tools, +54%

Personalized stores (with My Account, profile, favorites), +53%

Shop by outfit, room or collection, +50%

Mobile check inventory status, in-store or Web, +50%

Personalization engine (behavioral targeting), +48%

Advertising, promotions, bar-coded coupons - drive to store or Web, +48%

Branded social community page, +40%

User-created collections for sharing & purchase, +39%

User-generated visual content, +36%

Live chat/instant messaging, +35%

Visual product configurators (custom products), +34%

Videos, +34%

Dynamic displays, +33%

Collaborative custom product design, +32%

Personalization by ZIP code/geo-targeted sites, +28%

360-degree spin, +27%

Interactive brochures and catalogs, +26%

Results by Tactical Category

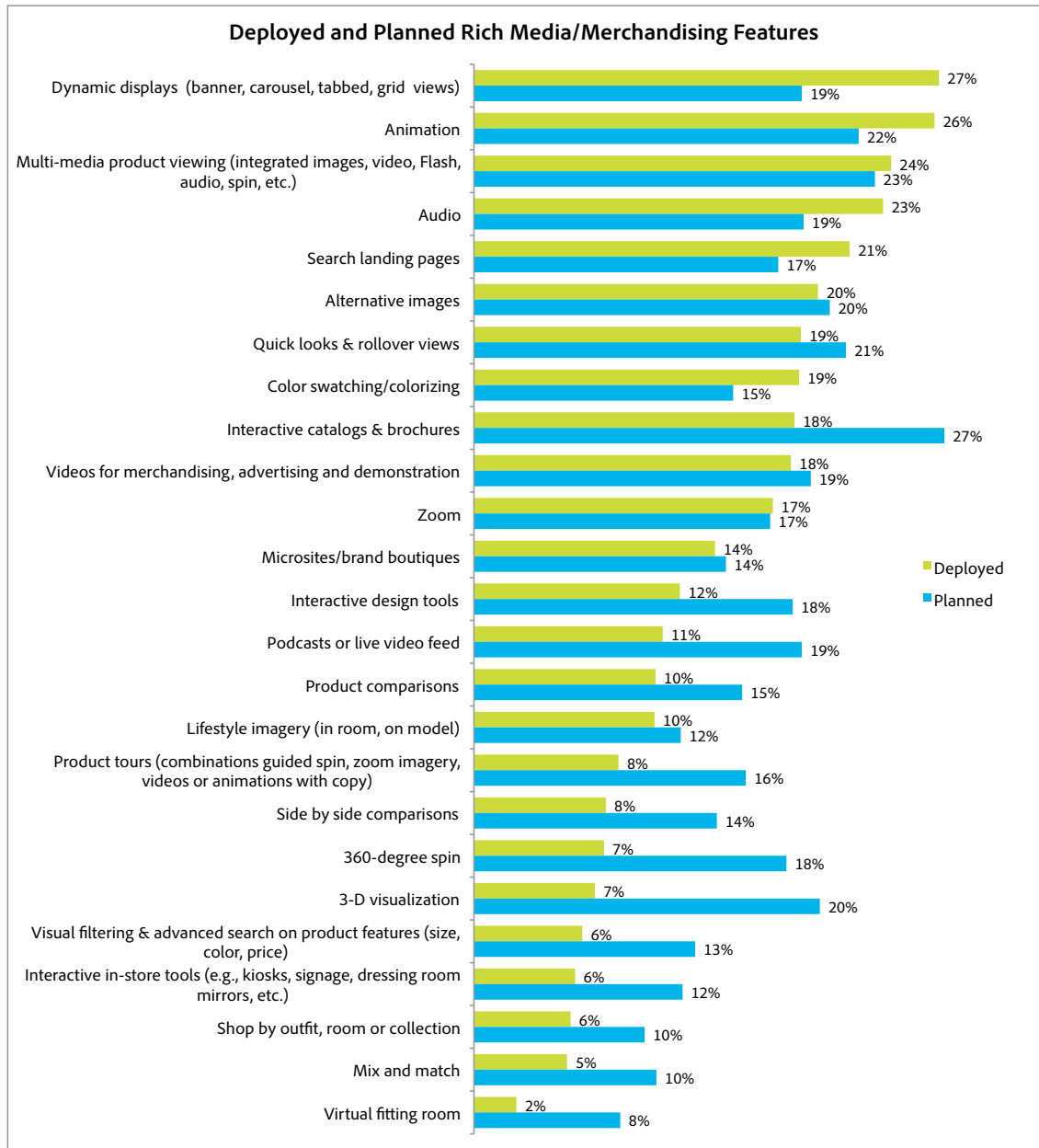
Below are the results for each tactical category across planned, deployed and effectiveness metrics.

Rich Media/Merchandising

Planned and deployed rich merchandising features

About a quarter of all respondents have deployed dynamic displays, animation, multimedia product viewing and audio. In line with last year's results, dynamic displays and animation rank among the top deployed rich media tactics, and most other features more or less maintain their deployment rates from a year ago.

Similarly, for planned deployments, most features are within range of last year's numbers, with interactive catalogs reclaiming its status as the most planned deployment.



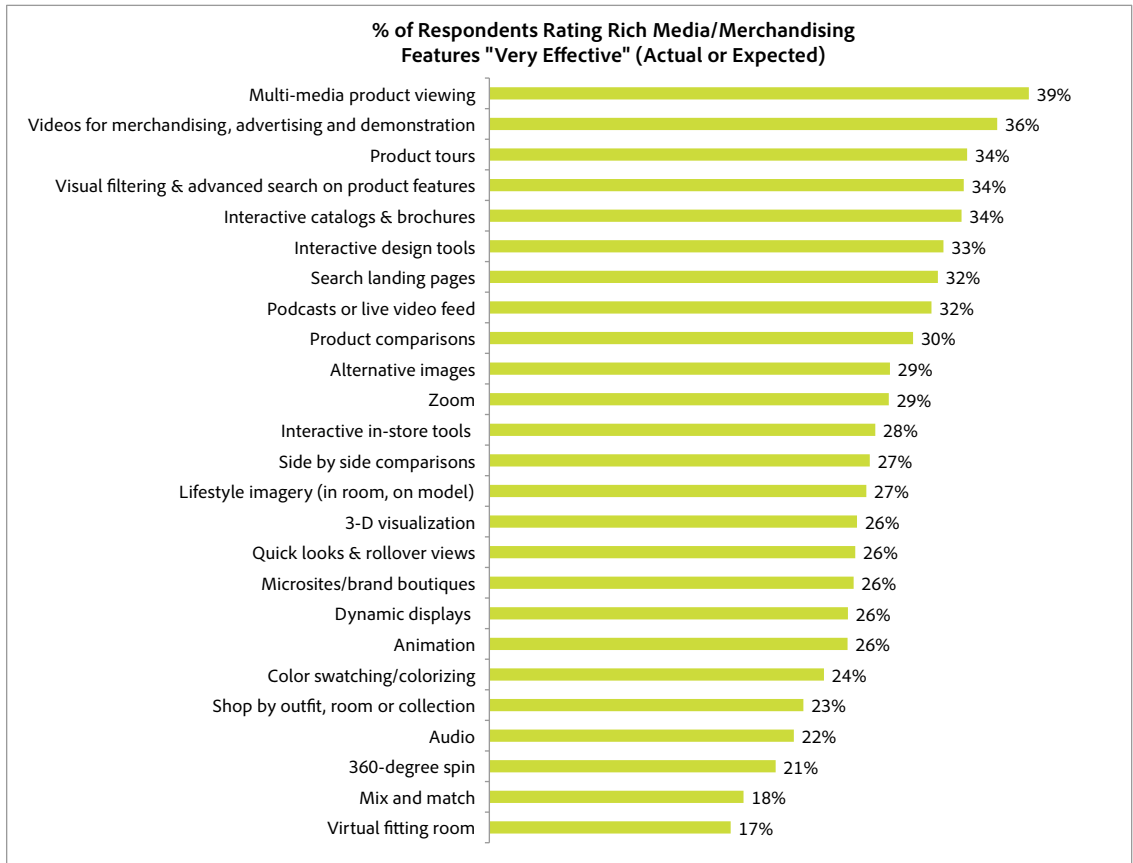
Rich media features with the highest year-on-year growth in deployment and planned deployments:

Rich media executions showing YOY growth in deployment
Dynamic displays, +7%
Animation, +5%
Color swatching/colorizing, +4%
360-degree spin, +4%

Rich media executions showing YOY growth in planned deployment
Quick looks & rollover views, +13%

Rich merchandising features effectiveness

Similar to last year's results, the features drawing the most 'very effective' ratings from respondents who have deployed or are planning to deploy these tactics have to do more with experiences integrating sound, video, images. This year, multimedia product viewing, grabs the top "very effective" ranking, followed by videos and product tours.



The effectiveness ratings of rich media features have generally trended positive from a year ago.

Below are the rich media executions showing the largest year-over-year change in the percentage of respondents rating it 'very effective':

Rich media executions showing YOY growth in percentage of respondents rating them "very effective"
Interactive design tools, +54%
Shop by outfit, room or collection, +50%
Videos for merchandising, advertising and demonstration, +34%

Rich media executions showing YOY growth in percentage of respondents rating them "very effective"

Dynamic displays (banner, carousel, tabbed, grid views), +33%

360-degree spin, +27%

Interactive catalogs & brochures, +26%

Audio, +25%

Lifestyle imagery (in room, on model), +23%

Quick looks & rollover views, +20%

Alternative images, +19%

Podcasts or live video feed, +19%

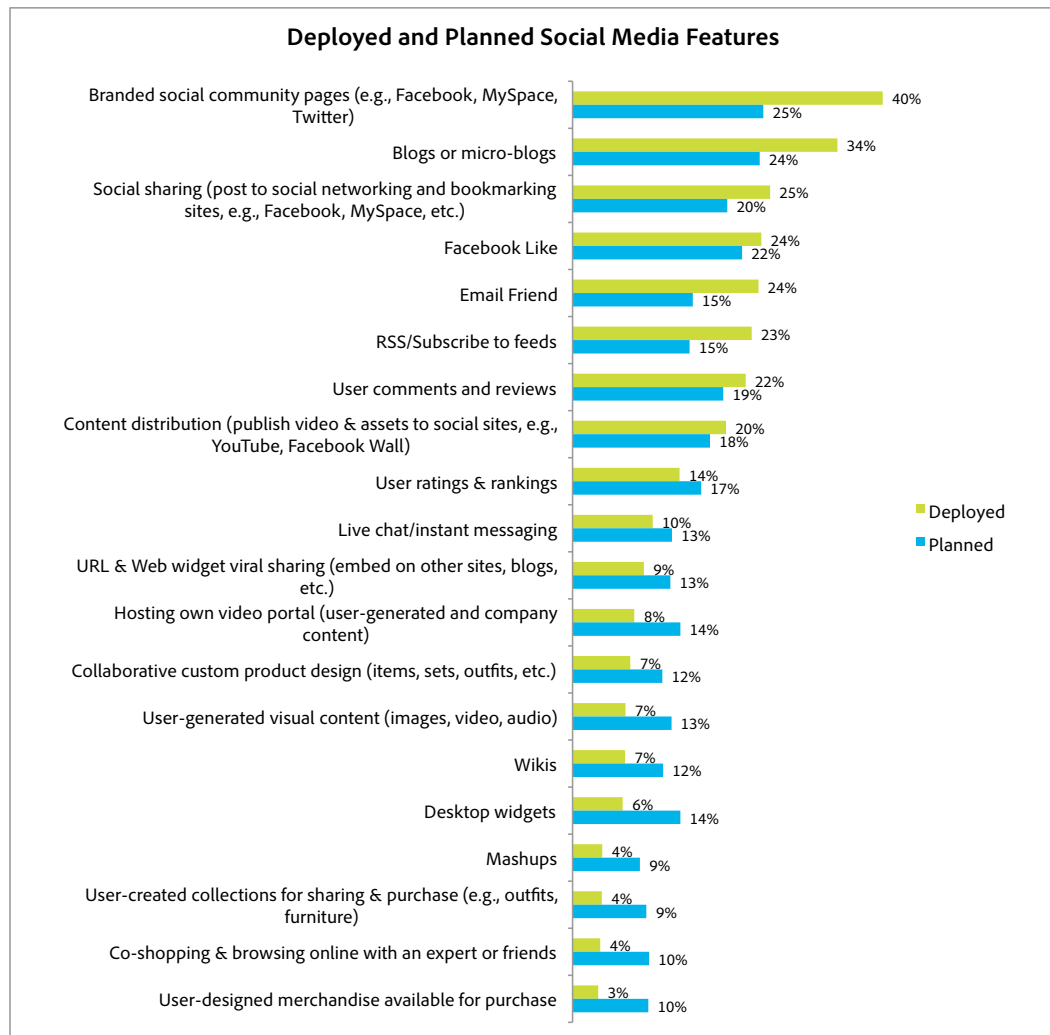
Color swatching/colorizing, +17%

Mix and match, +12%

Social Media-Based Features

Planned and Deployed Social Media-Based Features

Reprising last year's tally, branded social community pages was the most deployed social feature, followed by blogs/micro-blogs. With the addition of Facebook Like, email friend and social sharing, last year's top-ranked deployed features like RSS and user comments/reviews fell lower. These new features are also among the most planned, joining branded social community pages and blogs/micro-blogs.



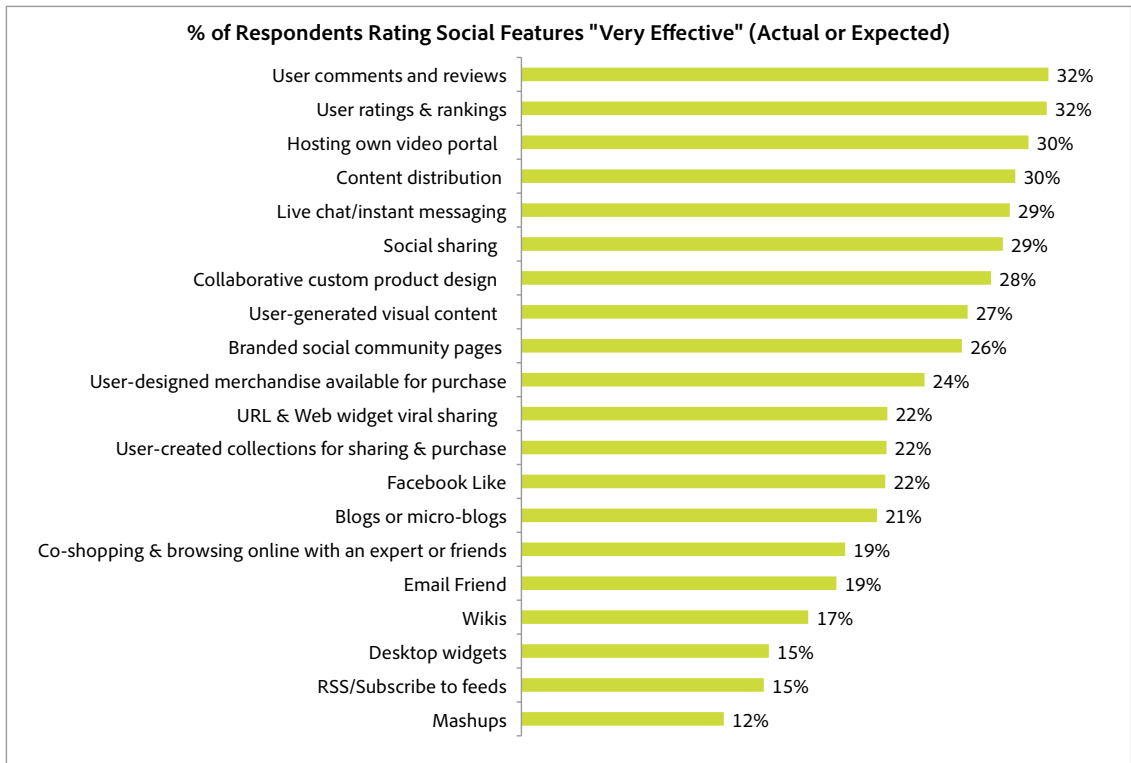
The following social media features saw the highest year-on-year growth in deployment and planned deployments:

Social media executions showing YOY growth in deployment
Branded social community pages, +20%
Blogs or micro-blogs, +6%

Social media executions showing YOY growth in planned deployment
Branded community social pages, +2%

Social-Media-Based Features Effectiveness

User comments and reviews, and user ratings and rankings were features that drew the most "very effective" ratings this year, unchanged for the last three years now.



Below are the social executions showing the largest year-on-year change in the percentage of respondents rating it "very effective":

Social media executions showing YOY growth in percentage of respondents rating them "very effective"
User-designed merchandise available for purchase, +74%
Branded social community pages (e.g., Facebook, Twitter), +40%
User-created collections for sharing & purchase (e.g., outfits, furniture), +39%
User-generated visual content (images, video, audio), +36%
Live chat/instant messaging, +35%
Collaborative custom product design, +32%
Desktop widgets, +24%
Mashups, +22%
User ratings & rankings, +20%

Social media executions showing YOY growth in percentage of respondents rating them "very effective"

Blogs or micro-blogs, +20%

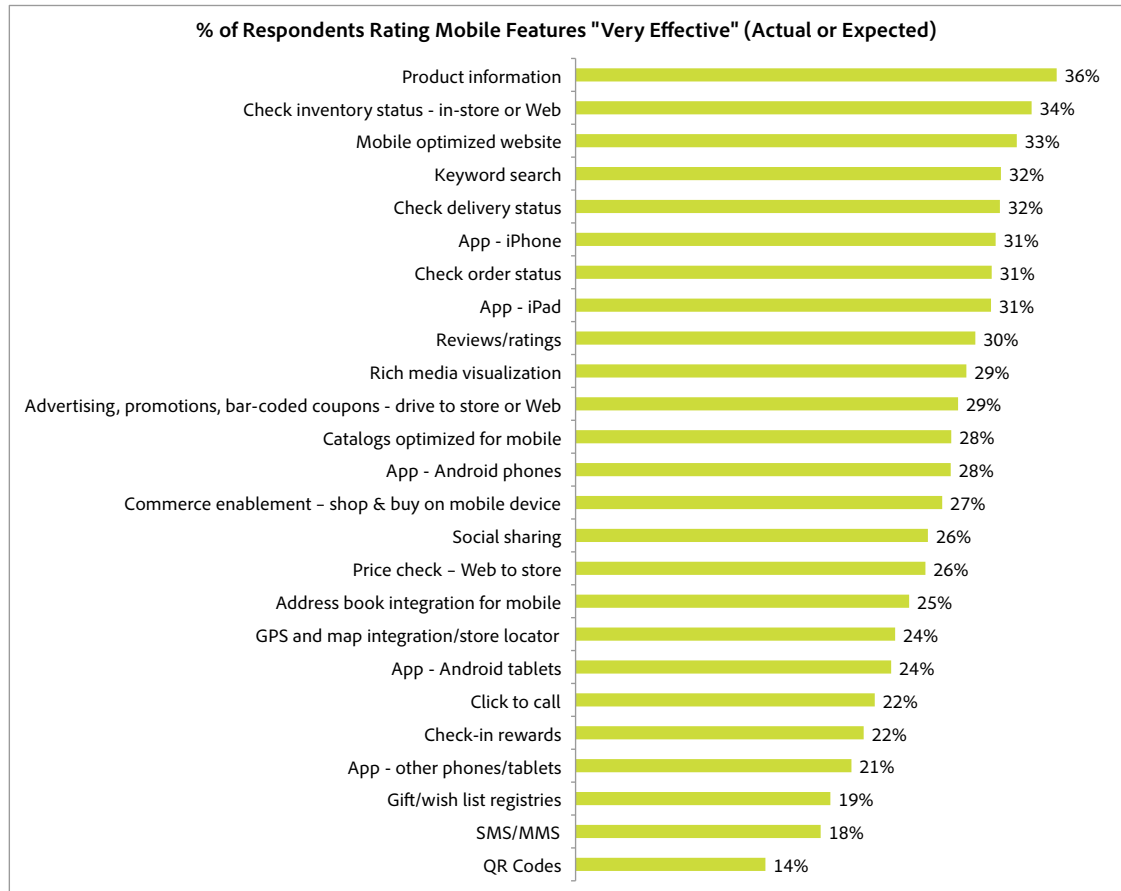
URL & Web widget viral sharing (embed on other sites, blogs, etc.), +17%

Co-shopping & browsing online with an expert or friends, +12%

Mobile Features (excluding visualization features)

Planned and deployed mobile features

Mobile's top deployed feature is keyword search, followed by product information, while apps are the top planned executions, suggesting that businesses believe they have covered the basics and are moving to more immersive experiences. Last year's top deployed mobile tactics were address book integration and check delivery status and top planned were advertising and promotions and check delivery status.



Below are the mobile deployments seeing the largest year-over-year growth:

Mobile executions showing YOY growth in deployment

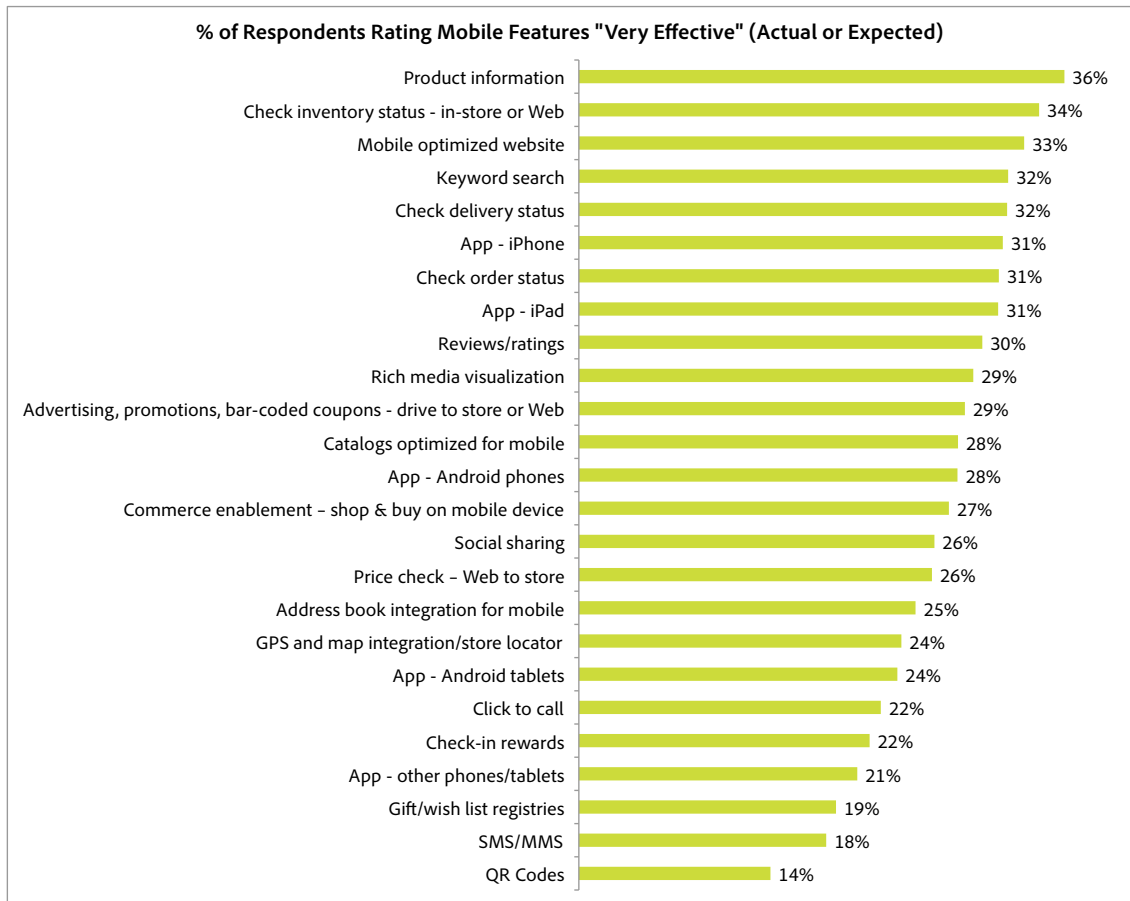
Check inventory status - in-store or Web, +19%

Commerce enablement - shop & buy on mobile device, +13%

Advertising, promotions, bar-coded coupons - drive to store or Web. +13%

Mobile Features Effectiveness

Product information, check inventory status and mobile-optimized sites are among the features scoring the highest number of respondents rating them "very effective"



Below are the mobile executions (excluding visualization features) showing the largest year-over-year change in the percentage of people rating it 'very effective':

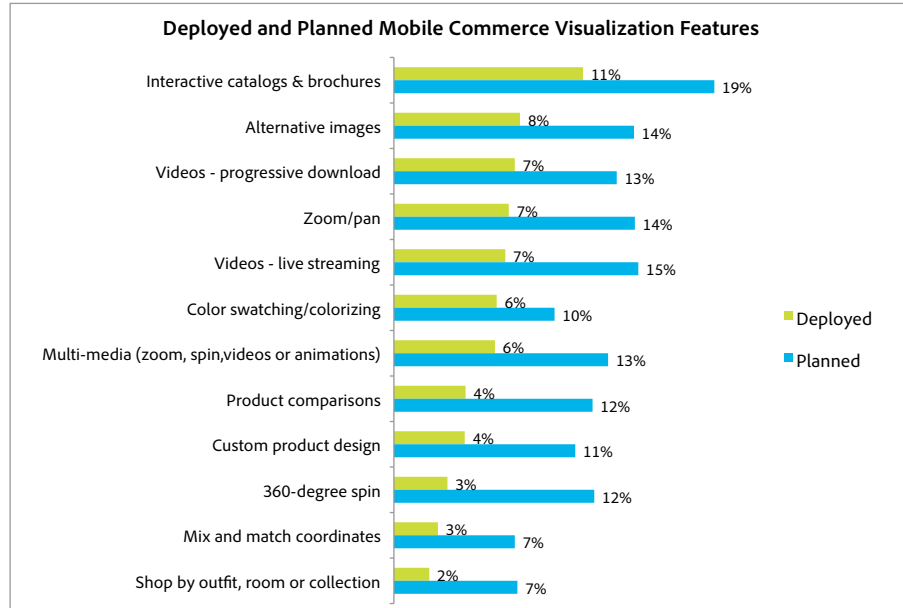
Mobile executions showing YOY growth in percentage of respondents rating them "very effective"
Commerce enablement, +124%
Check inventory status - in-store or Web, +50%
Advertising, promotions, bar-coded coupons - drive to store or Web, +48%
Price check - Web to store, +20%
Check delivery status, +16%
GPS and map integration/store locator, +13%
Address book integration for mobile, +12%

Mobile Commerce Visualization Features

Mobile commerce visualization is a new category this year created to gauge interest in leveraging visualization features to drive mobile commerce.

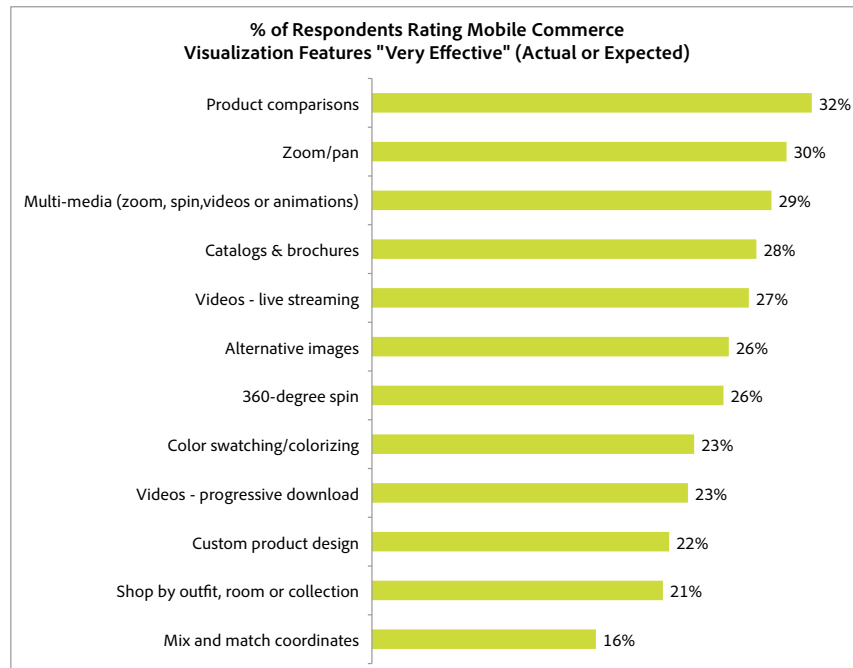
Planned and deployed mobile visualization features

Interactive catalogs is the top deployed and planned execution within the mobile visualization category and with mobile still in its early days, deployment rates lag planned rates. In the nascent channel, basic viewing tools like alternative images, zoom and videos rank ahead of bells and whistles like 360-degree spin and mix-and-match merchandising for both deployed and planned executions.



Mobile commerce visualization features effectiveness

Product comparisons, zoom/pan and multimedia product viewing are among the mobile commerce features that have the most respondents rating them "very effective."

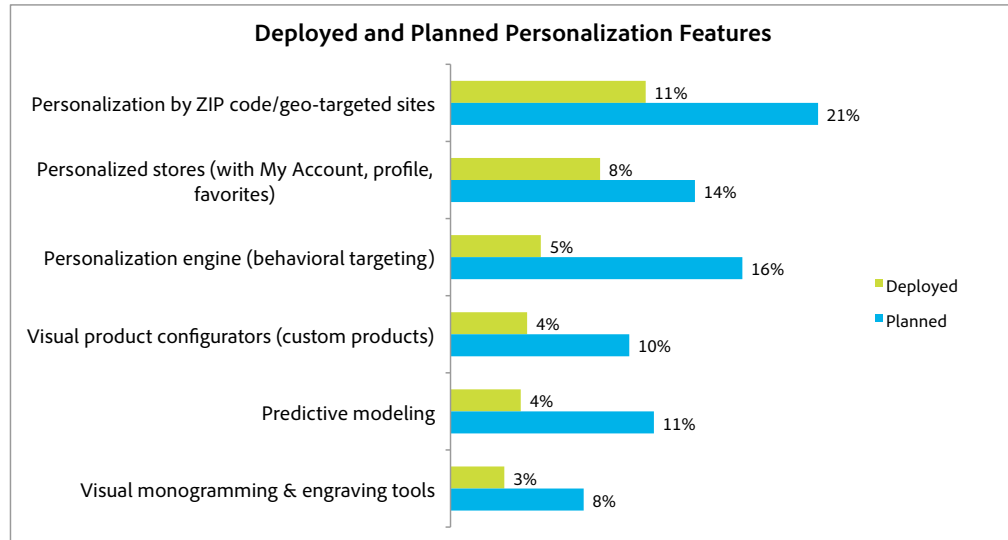


Personalization Features

Planned and Deployed Personalization Features

Identical to last year's results, this year's most deployed personalization tactic is zipcode targeting/geo-targeted sites, followed by personalized stores.

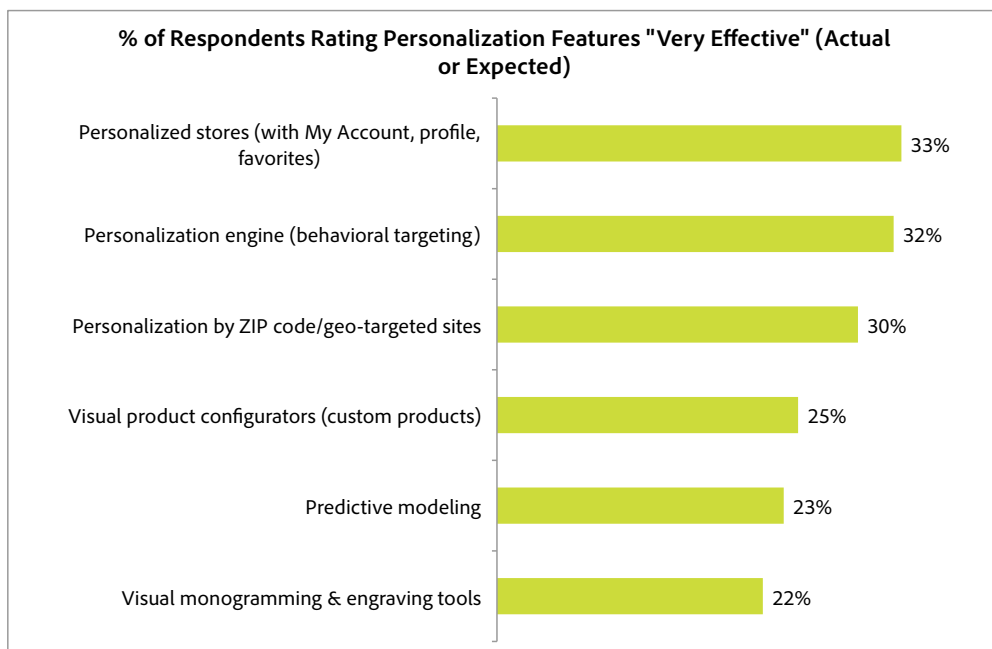
Personalization features are among the least deployed tactics, yet have the highest effectiveness ratings, suggestive of a perception that personalization is a complex execution even though it gets marketers closer to a one-to-one dialogue with consumers.



The following personalization features saw the highest year-on-year growth in deployment:

Personalization executions showing YOY growth in deployment
Predictive modeling, +44%
Personalization by ZIP code/geo-targeted sites, +16%
Personalized stores (with My Account, profile, favorites), +5%

Personalization Features Effectiveness



Below are the personalization executions showing the largest year-over-year change in the percentage of respondents rating it "very effective":

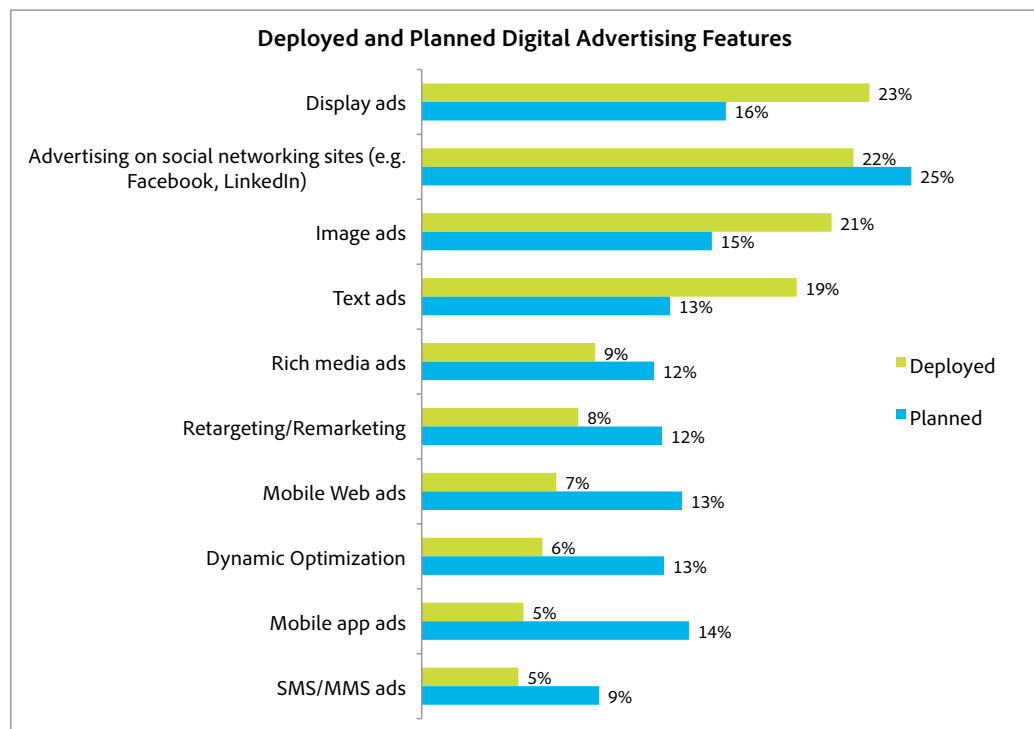
Personalization executions showing YOY growth in percentage of respondents rating them "very effective"
Visual monogramming & engraving tools, +110%
Predictive modeling, 98%
Personalized stores (with My Account, profile, favorites), +53%
Personalization engine (behavioral targeting), +48%
Visual product configurators, +34%
Personalization by ZIP code/geo-targeted sites, +28%

Digital Advertising Executions

This year, digital advertising executions were measured for the first time.

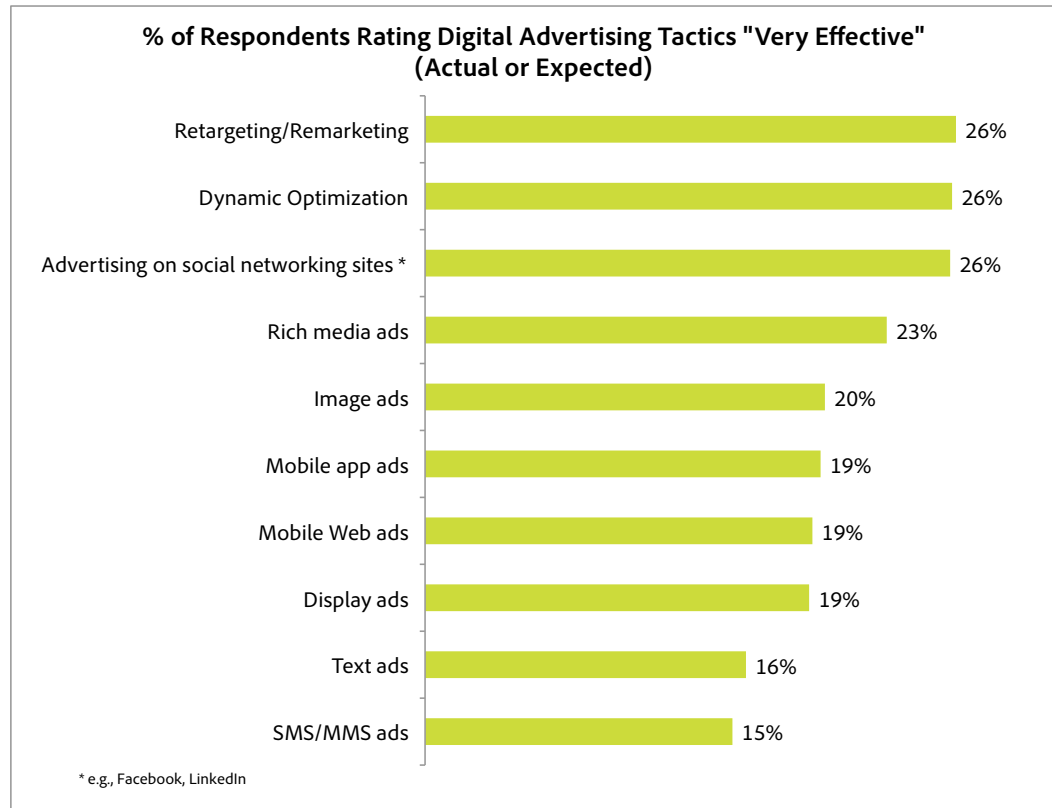
Planned and deployed digital advertising executions and strategies

Advertising on social networks sits at the top of both the deployed and planned executions, in another sign that social is top of mind for marketers today. Thanks to Japan's relatively high adoption of text ads at 27% (versus 16% for North America), this execution weighs in at 19%, at a deployment rate comparable with richer executions.



Digital Advertising Effectiveness

Interestingly, the advertising executions that collected the most "very effective" ratings are not related to creative executions, but have more to do with technique and strategy, such as retargeting, optimization and reaching users on social sites. But among creative executions, more people rate rich media ads more effective than text and SMS ads.



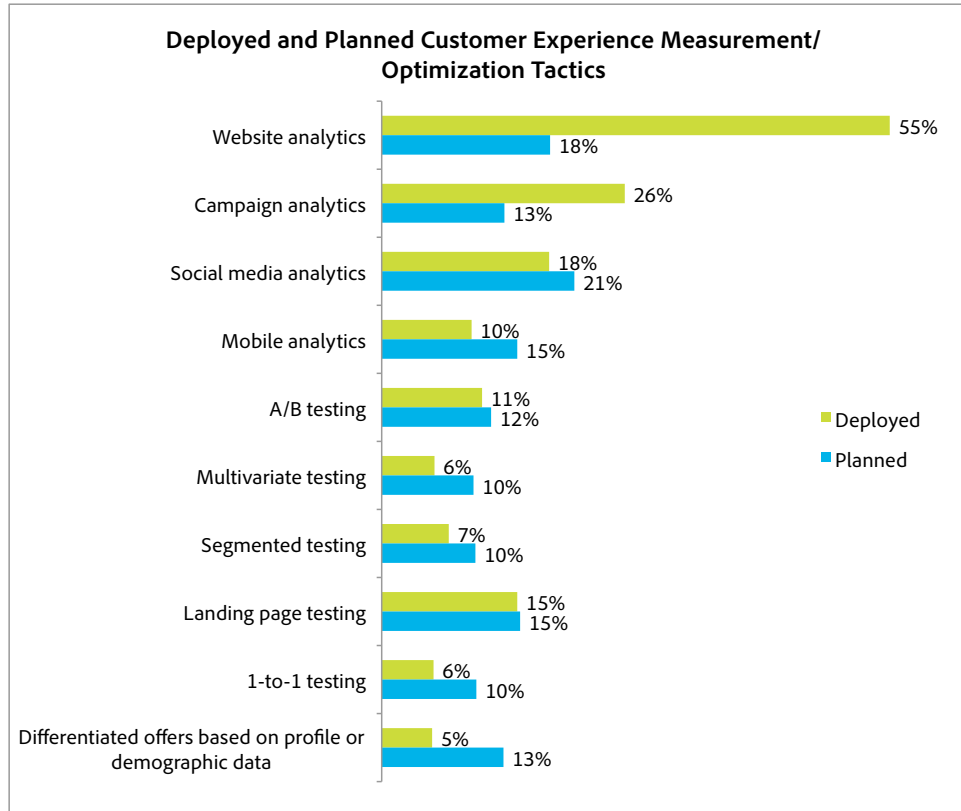
Analytics

Analytics were measured for the first time this year.

Planned and Deployed Analytics

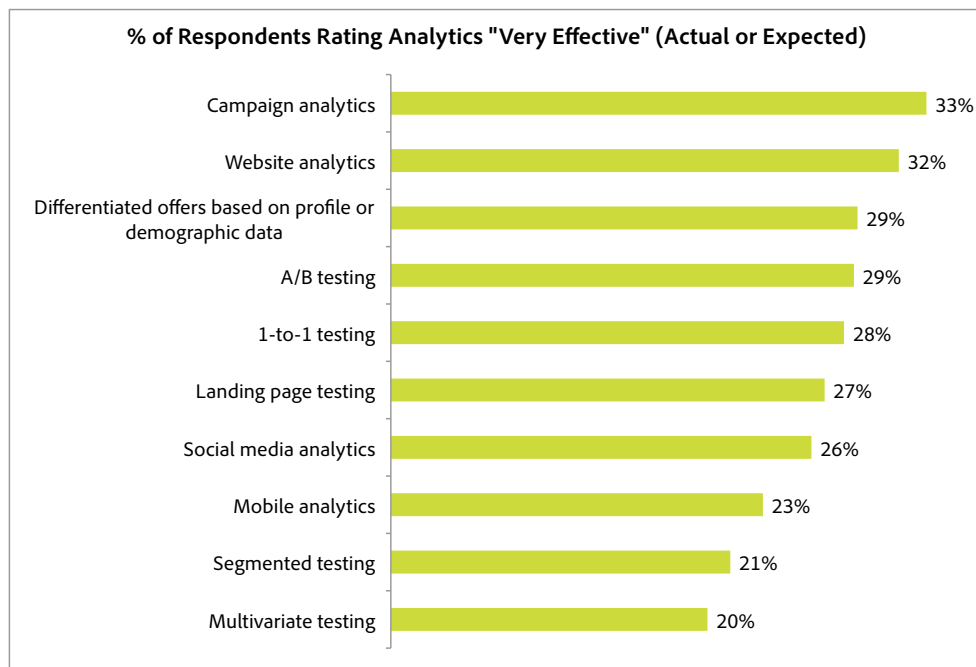
Of all the executions measured, website analytics is the most deployed globally. Other types of tools measuring and optimizing online interactions find favor in different regions. For instance, EMEA deploys campaign analytics at a rate of 34%, versus North America's 24%, while Japan deploys mobile analytics at a 14% rate, 5 percentage points higher than EMEA.

Further proof that social media's tentacles are spreading fast, analytics to gauge social marketing nab the highest planned deployment rate.



Analytics Effectiveness

Campaign and web analytics are about even in the number of respondents rating them "very effective." Likely due to their newness, social and mobile analytics rank lower in effectiveness compared to more mature tools like site analytics. To be sure, businesses are still grappling with proving a link between their social efforts and revenue.



Results by Geography

This section compares global and regional results.

Top Deployed Executions, Globally and Regionally

Website analytics are the no.1 deployed tactic across all regions, with higher deployments in Japan and Europe. Apart from analytics, social and rich media dominate the mix of top deployed tactics across regions. Blogs/microblogs are deployed by about a third of the respondents across all regions.

Global	Japan
Website analytics (55%)	Website analytics (60%)
Branded social community page (e.g. Facebook, Twitter) (40%)	Blogs or micro-blogs (36%)
Blogs or micro-blogs (34%)	Animation (33%)
Dynamic displays (banner, carousel, tabbed, grid views) (27%)	Rich media search landing pages (31%)
Campaign analytics (26%), Animation (26%)	Branded social community pages (30%)
North America	EMEA
Website analytics (51%)	Website analytics (60%)
Branded social community pages (44%)	Branded social community pages (41%)
Blogs or micro-blogs (34%)	Campaign analytics (34%)
Social sharing (29%)	Blogs or micro-blogs (33%)
Facebook Like (26%), Display ads (26%)	Dynamic displays (banner, carousel, tabbed, grid views) (31%), Facebook Like (31%), Email Friend (31%)

Top planned deployments, globally and regionally

Interactive catalogs is no. 2 in planned deployment for North America and EMEA.

EMEA respondents are planning to deploy rich media features at significantly higher rates than Japan or North America—and deploying more of them (see section Regional Differences Highlighted in the following pages).

Global	EMEA
Interactive catalogs & brochures (27%), App - iPhone (27%)	App - iPhone (34%)
Advertising on social networking sites (25%), App - iPad (25%)	Interactive catalogs & brochures (33%)
Branded social community pages (25%)	3-D visualization (32%)
Blogs or micro-blogs (24%)	Branded social community pages (31%)
	Multi-media product viewing (30%)
North America	Japan
Advertising on social networking sites (29%)	App - Android phones (23%)
Interactive catalogs & brochures (28%)	App - iPhone (22%)
Blogs or micro-blogs (27%)	App - iPad (21%)
Quick looks & rollover views (26%)	App - Android tablets (17%), Branded social community pages (17%)

Executions with Most "Very Effective" Ratings, Globally and Regionally

Globally, the below executions garnered the most "very effective" ratings among those who have deployed or are planning to deploy the features.

Global	EMEA
Multi-media product viewing (39%)	Check order status on mobile devices (42%)
Videos for merchandising, advertising and demonstration (36%), Product information (36%)	Multi-media product viewing (42%)
Product tours (34%)	Mobile check inventory status, in-store or Web (42%)
Mobile check inventory status, in-store or Web (34%)	Personalized stores (41%)
Visual filtering & advanced search on product features (34%)	Mobile optimized website (40%)
Interactive catalogs & brochures (34%)	
North America	Japan
Videos for merchandising, advertising and demonstration (40%)	Differentiated offers based on profile or demographic data (37%)
Multi-media product viewing (integrated images, video, Flash, audio, spin, etc.) (40%)	User-generated visual content (images, video, audio) (35%)
Mobile product information (39%)	Interactive design tools (33%)
Campaign analytics (38%)	Podcasts or live video feed (31%)
Mobile advertising, promotions, bar-coded coupons - drive to store or Web (37%), App - iPad (37%)	Lifestyle imagery (in room, on model) (31%)

About the Adobe Online Marketing Suite

The Adobe® Online Marketing Suite, powered by Omniture®, offers an integrated and open platform for online business optimization, a strategy for using customer insight to drive innovation throughout the business and enhance marketing efficiency. The Suite consists of integrated applications to collect and unleash the power of customer insight to optimize customer acquisition, conversion and retention efforts as well as the creation and distribution of content. For example, using the Suite, marketers can identify the most effective marketing strategies and ad placements as well as create relevant, personalized and consistent customer experiences across digital marketing channels, such as onsite, display, e-mail, social, video and mobile. The Suite enables marketers to make quick adjustments, automate certain customer interactions and better maximize marketing ROI, which, ultimately, can positively impact the bottom line. For more information, visit www.omniture.com.

About Adobe Scene7

Adobe Scene7 is a hosted solution for managing, enhancing, publishing and delivering dynamic marketing assets and rich visual merchandising to Web, mobile, email, Internet-connected displays and print. With Scene7, companies can grow revenues, enhance customer experience and cut production costs via an easy-to-use, web-based system requiring minimal IT support. There is no other SaaS platform more comprehensive and powerful for automating the management, production and delivery of high-impact data-driven media.

To manage, deliver and automate this high-quality dynamic experience, users upload and publish high-resolution content (imagery, video, CS5 templates, fonts, graphics etc), along with dynamic URL calls tied to any database such as (product, pricing or CRM) so that any new version or composite can be automatically created in real-time. With more than 110 preset viewers and players to choose from, publishers can deliver "out-of-the-box", data-driven rich experiences scaled across all content and optimized for every channel, with no customization and minimal IT support. All Scene7 solutions are hosted and delivered through its global, scalable, performance-optimized on-demand network.

Adobe Scene7 is now part of the Adobe Online Marketing Suite (OMS), powered by Omniture. The suite consists of a comprehensive portfolio of optimization applications for Visitor Acquisition, Conversion, Online Analytics and Channel Analytics and is built on an Open Business Analytics Platform.

Scene7 is tightly integrated with Adobe's analytics & conversion products, which allow online marketers to test, measure and optimize key messages; target specific segments with relevant content; combine attitudinal data with analytics to better understand behavior and leverage merchandising strategies to sell products and services.

To learn more about the Online Marketing Suite, please contact us:

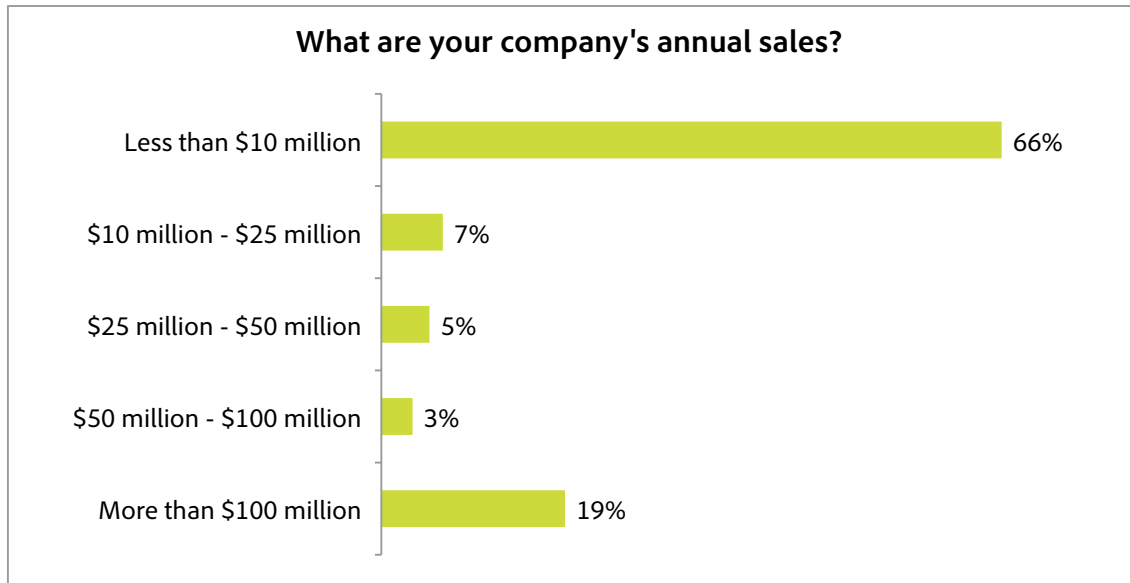
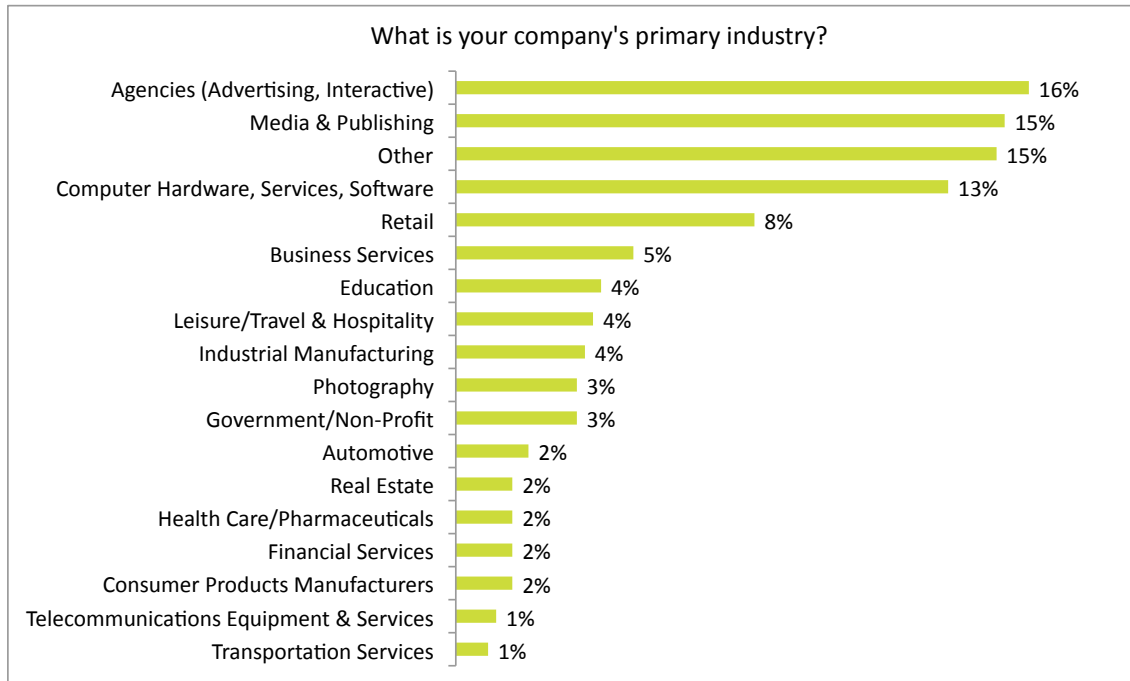
1-800-309-9301
s7marketing@scene7.com

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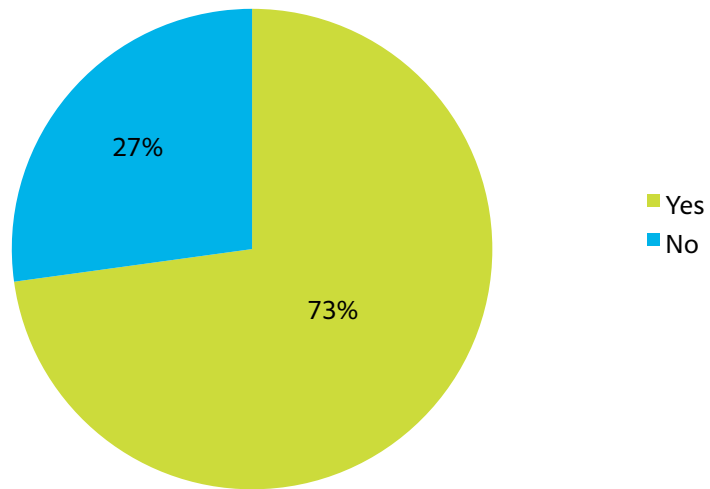
Adobe is changing the world through digital experiences. For more information, visit www.adobe.com.

Appendix 1 – North America Survey Results

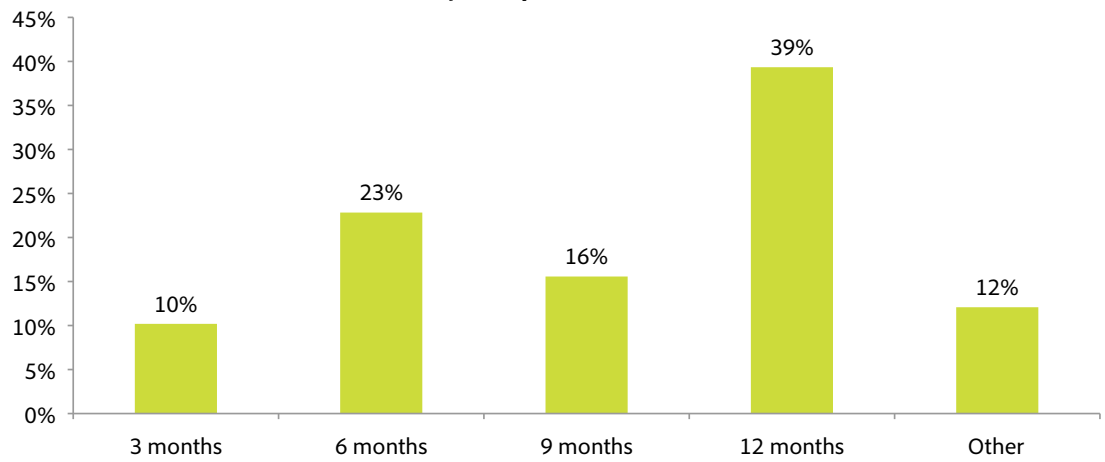
Participant profile



Will your company invest in site redesigns or make significant enhancements to improve your site's ROI in 2011?

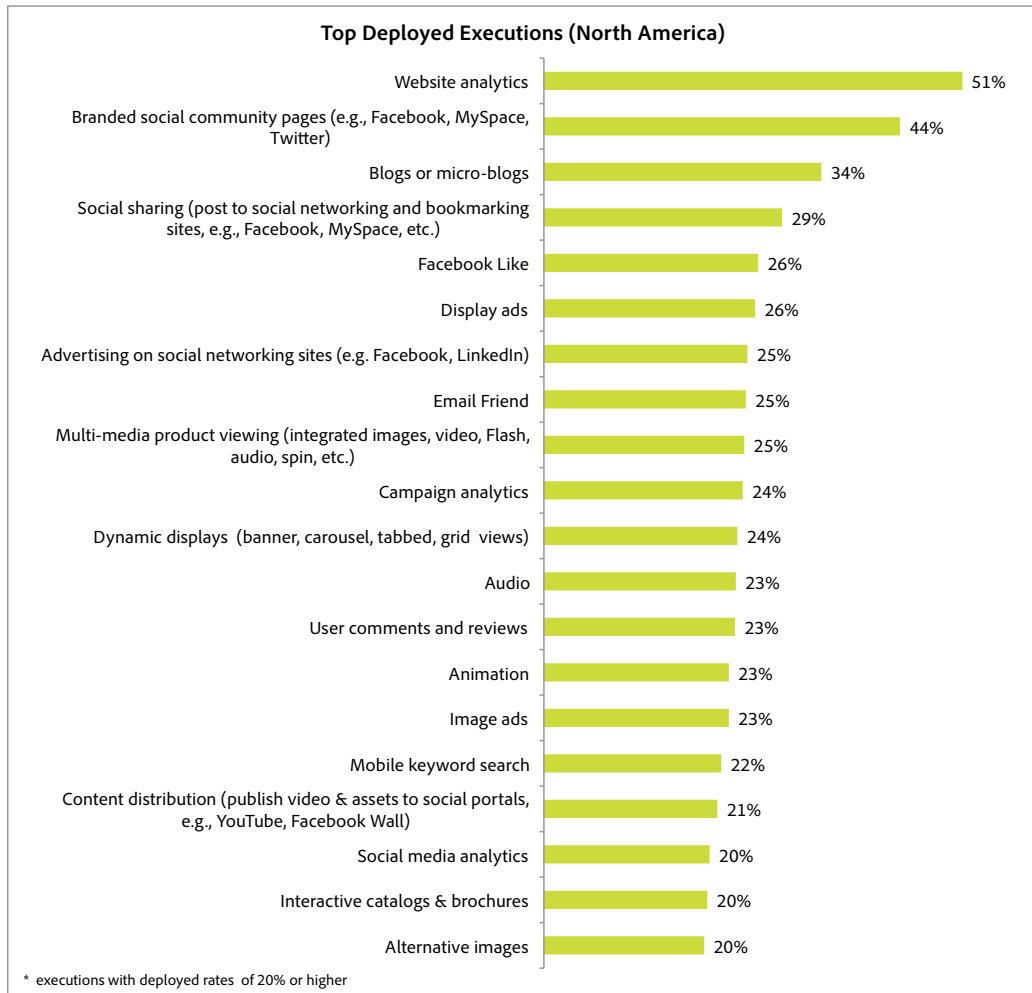


Will your company invest in site redesigns or make significant enhancements to improve your site's ROI in 2011?



Deployed/planned/most effective online tactics & executions

Deployed executions



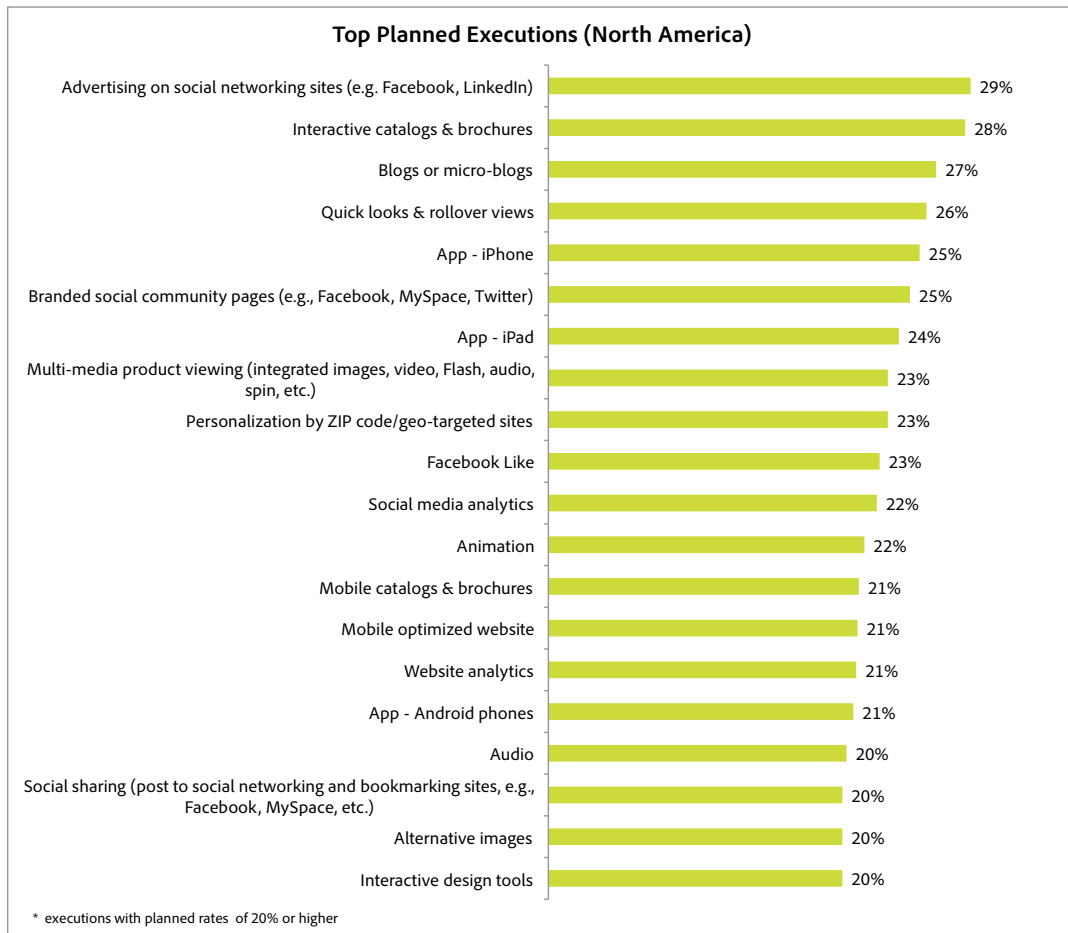
Other deployed executions

RSS/Subscribe to feeds	19%
Quick looks & rollover views	18%
Videos for merchandising, advertising and demonstration	17%
Text ads	16%
Color swatching/colorizing	16%
Mobile product information	16%
Search landing pages	14%
Interactive design tools	14%
Mobile social sharing	14%
User ratings & rankings	14%
Zoom	14%
Landing page testing	14%
Microsites/brand boutiques	12%
Mobile catalogs & brochures	12%

Other deployed executions	
Mobile videos - progressive download	12%
Mobile alternative images	12%
Mobile videos - live streaming	11%
Mobile multi-media (zoom, spin,videos or animations)	10%
Mobile zoom/pan	10%
Mobile color swatching/colorizing	10%
Mobile custom product design	10%
Mobile product comparisons	9%
Mobile 360-degree spin	9%
Mobile mix and match coordinates	9%
Mobile shop by outfit, room or collection	9%
Mobile optimized website	9%
Rich media ads	9%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	8%
Collaborative custom product design (items, sets, outfits, etc.)	8%
Hosting own video portal (user-generated and company content)	8%
A/B testing	8%
Mobile videos - progressive download	8%
Mobile reviews/ratings	8%
Mobile alternative images	8%
360-degree spin	8%
Mobile analytics	8%
Address book integration for mobile	8%
Personalized stores (with My Account, profile, favorites)	8%
App - iPad	8%
3-D visualization	8%
User-generated visual content (images, video, audio)	8%
Mobile check inventory status - in-store or Web	7%
Mobile videos - live streaming	7%
Side by side comparisons	7%
Wikis	7%
Desktop widgets	7%
Mobile GPS and map integration/store locator	7%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	6%
Mobile multi-media (zoom, spin,videos or animations)	6%
Segmented testing	6%
Mobile click to call	6%
Retargeting/Remarketing	6%

Other deployed executions	
Mobile zoom/pan	6%
Differentiated offers based on profile or demographic data	6%
Mobile rich media visualization	5%
1-to-1 testing	5%
Shop by outfit, room or collection	5%
Mobile Web ads	5%
Visual filtering & advanced search on product features (size, color, price)	5%
Personalization engine (behavioral targeting)	5%
Mobile color swatching/colorizing	5%
Mobile custom product design	5%
Visual product configurators (custom products)	5%
Mix and match	5%
Dynamic Optimization	5%
Mobile gift/wish list registries	5%
Multivariate testing	4%
QR Codes	4%
User-created collections for sharing & purchase (e.g., outfits, furniture)	4%
Mobile product comparisons	4%
SMS/MMS	4%
SMS/MMS ads	4%
Mobile app ads	4%
Mobile check-in rewards	4%
App - Android phones	3%
User-designed merchandise available for purchase	3%
Mobile 360-degree spin	3%
Commerce enablement - shop & buy on mobile device	3%
Mashups	3%
Visual monogramming & engraving tools	3%
Predictive modeling	3%
App - other phones/tablets	3%
Co-shopping & browsing online with an expert or friends	3%
Catalogs optimized for mobile	3%
Price check - Web to store	2%
Mobile mix and match coordinates	2%
App - Android tablets	2%
Virtual fitting room	2%
Mobile shop by outfit, room or collection	2%

Planned Executions



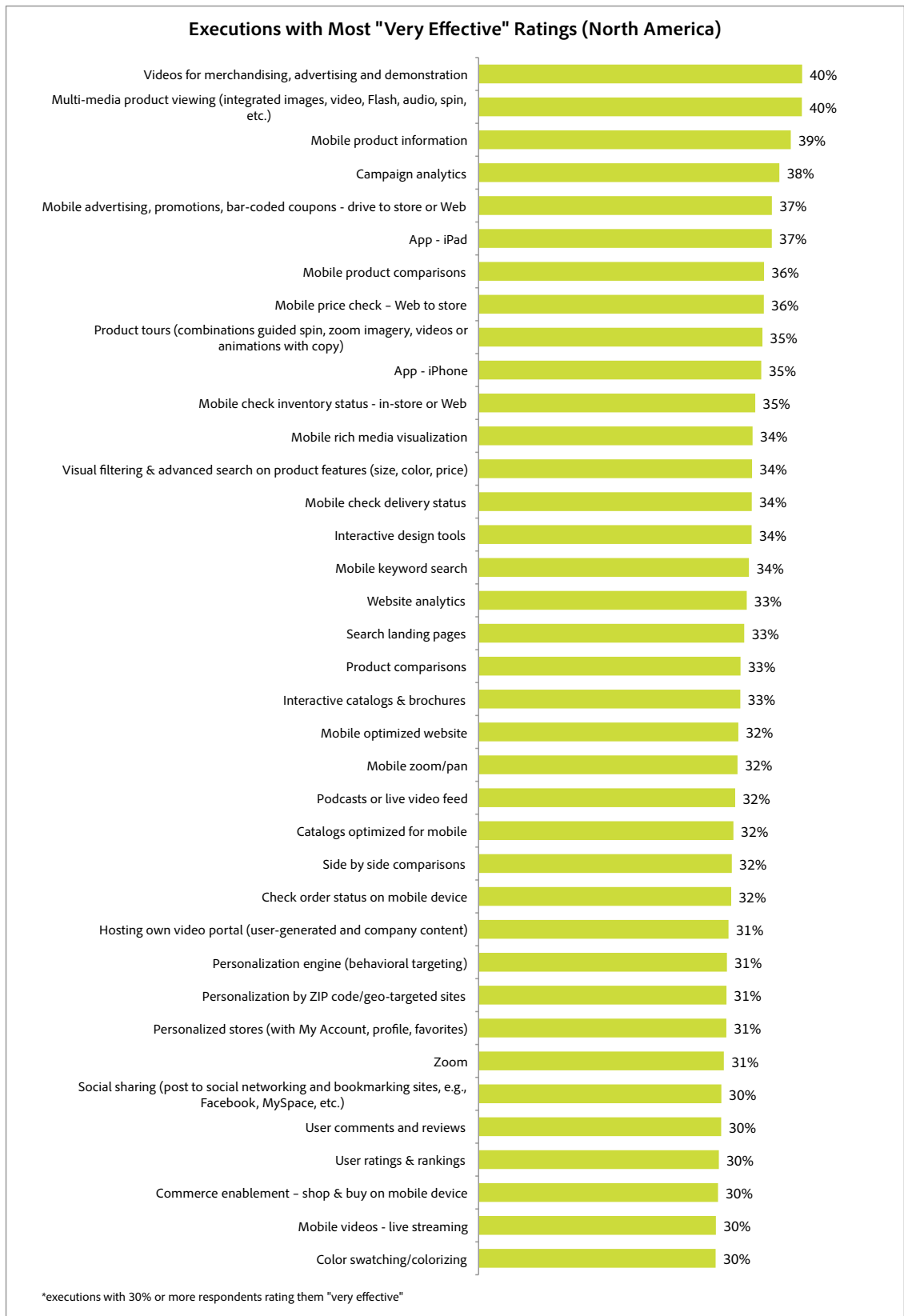
Other planned executions

Mobile videos - progressive download	19%
User comments and reviews	19%
Dynamic displays (banner, carousel, tabbed, grid views)	19%
Videos for merchandising, advertising and demonstration	19%
Mobile social sharing	18%
Display ads	18%
Search landing pages	18%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	17%
3-D visualization	17%
Zoom	17%
Image ads	17%
User ratings & rankings	17%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	17%
Mobile keyword search	17%

Other planned executions	
Personalization engine (behavioral targeting)	17%
Mobile shop by outfit, room or collection	16%
Color swatching/colorizing	16%
360-degree spin	16%
Email Friend	16%
RSS/Subscribe to feeds	16%
Landing page testing	16%
Mobile analytics	15%
App - Android tablets	15%
Text ads	15%
Mobile custom product design	15%
Mobile zoom/pan	15%
Mobile videos - live streaming	15%
Desktop widgets	15%
Mobile Web ads	14%
Hosting own video portal (user-generated and company content)	14%
Mobile videos - progressive download	14%
Side by side comparisons	14%
App - other phones/tablets	14%
Microsites/brand boutiques	14%
Mobile app ads	14%
Mobile alternative images	14%
Mobile videos - live streaming	14%
Campaign analytics	14%
Mobile multi-media (zoom, spin,videos or animations)	13%
Differentiated offers based on profile or demographic data	13%
Address book integration for mobile	13%
Personalized stores (with My Account, profile, favorites)	13%
Mobile click to call	13%
Mobile alternative images	13%
Rich media ads	13%
Visual filtering & advanced search on product features (size, color, price)	13%
Mobile 360-degree spin	12%
User-generated visual content (images, video, audio)	12%
Mobile mix and match coordinates	12%
Retargeting/Remarketing	12%
Mobile product comparisons	12%
Mobile product information	12%
Mobile custom product design	12%

Other planned executions	
Dynamic Optimization	12%
Mobile rich media visualization	12%
Wikis	12%
Mobile reviews/ratings	12%
Mobile GPS and map integration/store locator	12%
A/B testing	11%
Catalogs optimized for mobile	11%
Mobile check inventory status - in-store or Web	11%
QR Codes	11%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	11%
Collaborative custom product design (items, sets, outfits, etc.)	11%
Mobile 360-degree spin	11%
Mobile product comparisons	10%
Mobile color swatching/colorizing	10%
Predictive modeling	10%
Commerce enablement - shop & buy on mobile device	10%
Mix and match	10%
Segmented testing	10%
Visual product configurators (custom products)	10%
SMS/MMS	10%
1-to-1 testing	10%
Mobile gift/wish list registries	10%
Shop by outfit, room or collection	9%
User-designed merchandise available for purchase	9%
Co-shopping & browsing online with an expert or friends	9%
User-created collections for sharing & purchase (e.g., outfits, furniture)	9%
SMS/MMS ads	9%
Multivariate testing	9%
Mobile check-in rewards	9%
Mashups	8%
Price check - Web to store	8%
Virtual fitting room	7%
Visual monogramming & engraving tools	7%
Mobile shop by outfit, room or collection	7%
Mobile mix and match coordinates	7%

Executions drawing the most 'very effective' ratings



Other executions garnering 'very effective' ratings	
Collaborative custom product design (items, sets, outfits, etc.)	30%
Live chat/instant messaging	29%
1-to-1 testing	29%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	29%
Mobile 360-degree spin	29%
Predictive modeling	28%
Animation	28%
Mobile multi-media (zoom, spin, videos or animations)	28%
Dynamic Optimization	28%
Differentiated offers based on profile or demographic data	28%
Mobile reviews/ratings	28%
3-D visualization	28%
Visual product configurators (custom products)	27%
Social media analytics	27%
Mobile analytics	27%
Address book integration for mobile	27%
Alternative images	27%
Microsites/brand boutiques	27%
Mobile videos - progressive download	27%
Landing page testing	26%
Retargeting/Remarketing	26%
App - Android phones	26%
Mobile social sharing	26%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	26%
Quick looks & rollover views	26%
Mobile GPS and map integration/store locator	26%
Mobile check-in rewards	26%
Dynamic displays (banner, carousel, tabbed, grid views)	26%
User-designed merchandise available for purchase	26%
Mobile custom product design	26%
User-generated visual content (images, video, audio)	25%
App - other phones/tablets	25%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	25%
Audio	25%
Mobile Alternative images	25%
Mobile catalogs & brochures	25%
Branded social community pages (e.g., Facebook, MySpace, Twitter)	25%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	24%

Other executions garnering 'very effective' ratings	
Lifestyle imagery (in room, on model)	24%
A/B testing	24%
App - Android tablets	24%
Mobile click to call	24%
360-degree spin	23%
Rich media ads	23%
Facebook Like	22%
User-created collections for sharing & purchase (e.g., outfits, furniture)	22%
Mobile color swatching/colorizing	21%
Visual monogramming & engraving tools	21%
Segmented testing	21%
Email Friend	20%
Blogs or micro-blogs	20%
Mobile app ads	20%
Display ads	20%
Shop by outfit, room or collection	19%
Desktop widgets	19%
Image ads	19%
Wikis	19%
SMS/MMS	18%
Mobile shop by outfit, room or collection	18%
Mobile gift/wish list registries	18%
Co-shopping & browsing online with an expert or friends	17%
Mix and match	16%
QR Codes	16%
Virtual fitting room	16%
Mobile Web ads	16%
Mobile mix and match coordinates	15%
SMS/MMS ads	15%
RSS/Subscribe to feeds	15%
Multivariate testing	15%
Mashups	15%
Text ads	14%

Year-over-Year Trends

This table shows the executions having the largest year-to-year growth for each of the three metrics among businesses headquartered in North America.

Deployed Tactics

360-degree spin, +53%
Personalization engine (behavioral targeting), +31%
Mobile check inventory status - in-store or Web, +13%
Mobile check delivery status, +11%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web, + 8%
Personalized stores (with My Account, profile, favorites), +5%
3-D visualization, +3%
Personalization by ZIP code/geo-targeted sites, +1%

Planned Tactics

Dynamic displays (banner, carousel, tabbed, grid views), +18%
Alternative images, +16%
Quick looks & rollover views, +15%
Animation, +2%

"Very Effective" Tactics

Commerce enablement - shop & buy on mobile device, +184%
Mobile 360-degree spin, + 176%
Advertising, promotions, bar-coded coupons - drive to store or Web, + 120%
Predictive modeling, + 119%
Visual monogramming & engraving tools, +105%
Mix and match, + 92%
3-D visualization, +68%
Shop by outfit, room or collection, +64%
Mobile price check - Web to store, +56%
Branded social community pages (e.g., Facebook, MySpace, Twitter), +35%
Interactive catalogs & brochures, +34%
Interactive design tools, +32%
Audio, +31%
Mobile check inventory status - in-store or Web, + 26%
Mobile check delivery status, +21%
Personalized stores (with My Account, profile, favorites), +17%
Personalization engine (behavioral targeting), 14%
Zoom, 13%
Mobile product comparisons , +12%
Color swatching/colorizing, +10%

"Very Effective" Tactics

Visual product configurators (custom products), +6%

Lifestyle imagery (in room, on model), +3%

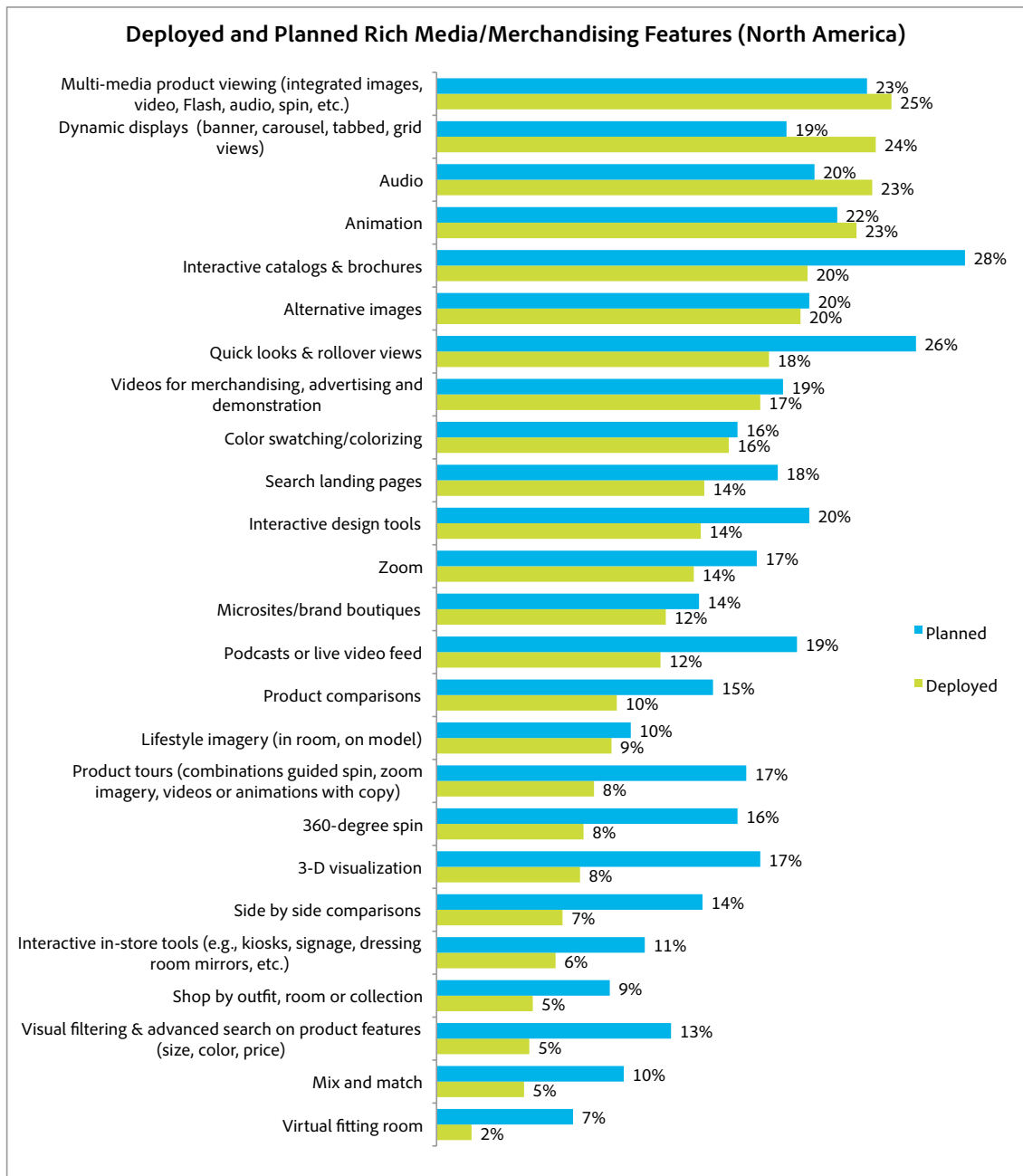
Side by side comparison, +2%

Results by Category

Below are the North America results for each tactical category across planned, deployed and effectiveness.

Rich Media/Merchandising

Planned and deployed rich merchandising features

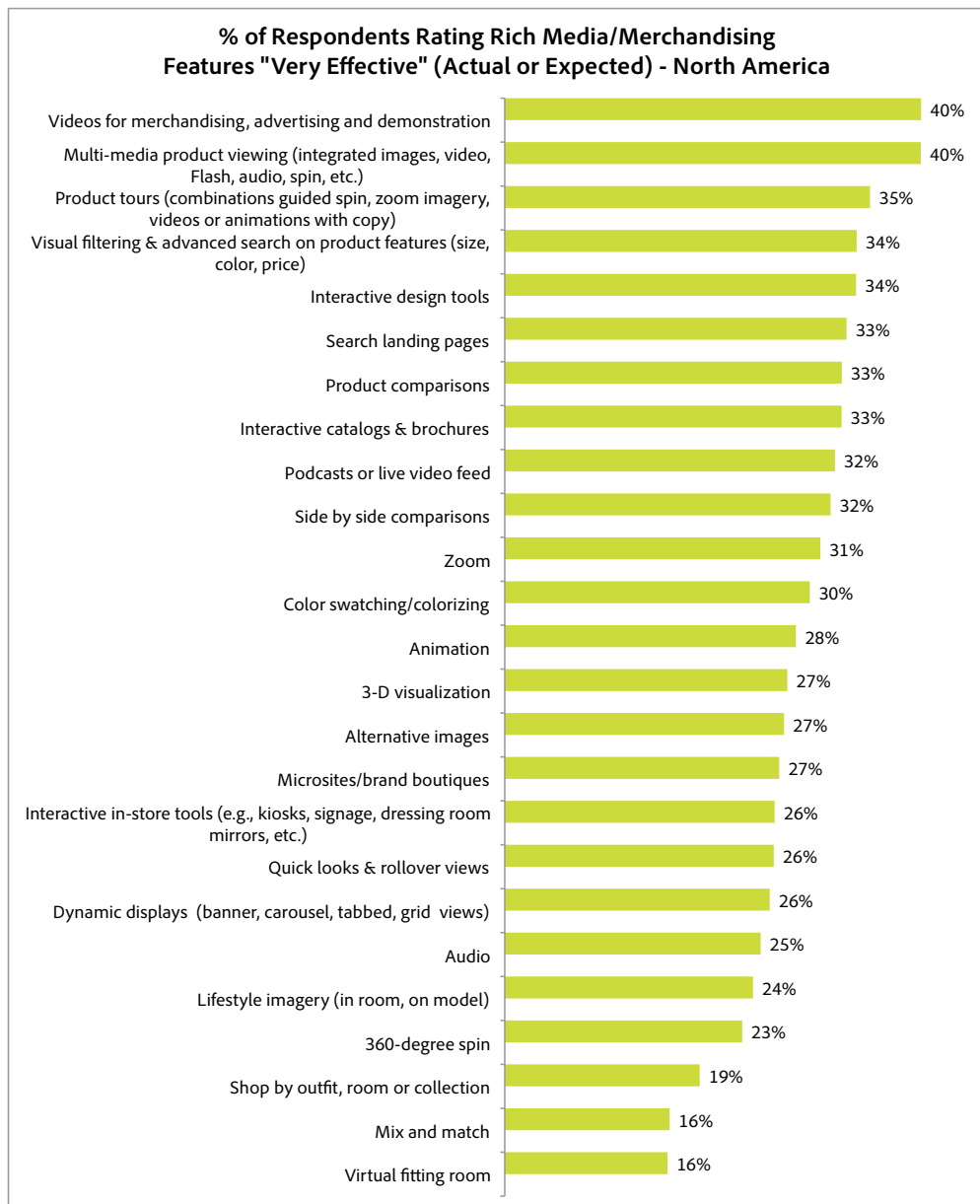


The following rich media features saw the highest year-on-year growth in deployment and planned deployments for North America:

Deployed
360-degree spin, +53%
3-D visualization, +3%

Planned
Dynamic displays (banner, carousel, tabbed, grid views), +18%
Alternative images, +16%
Quick looks & rollover views, +15%
Animation, +2%

Rich merchandising features effectiveness

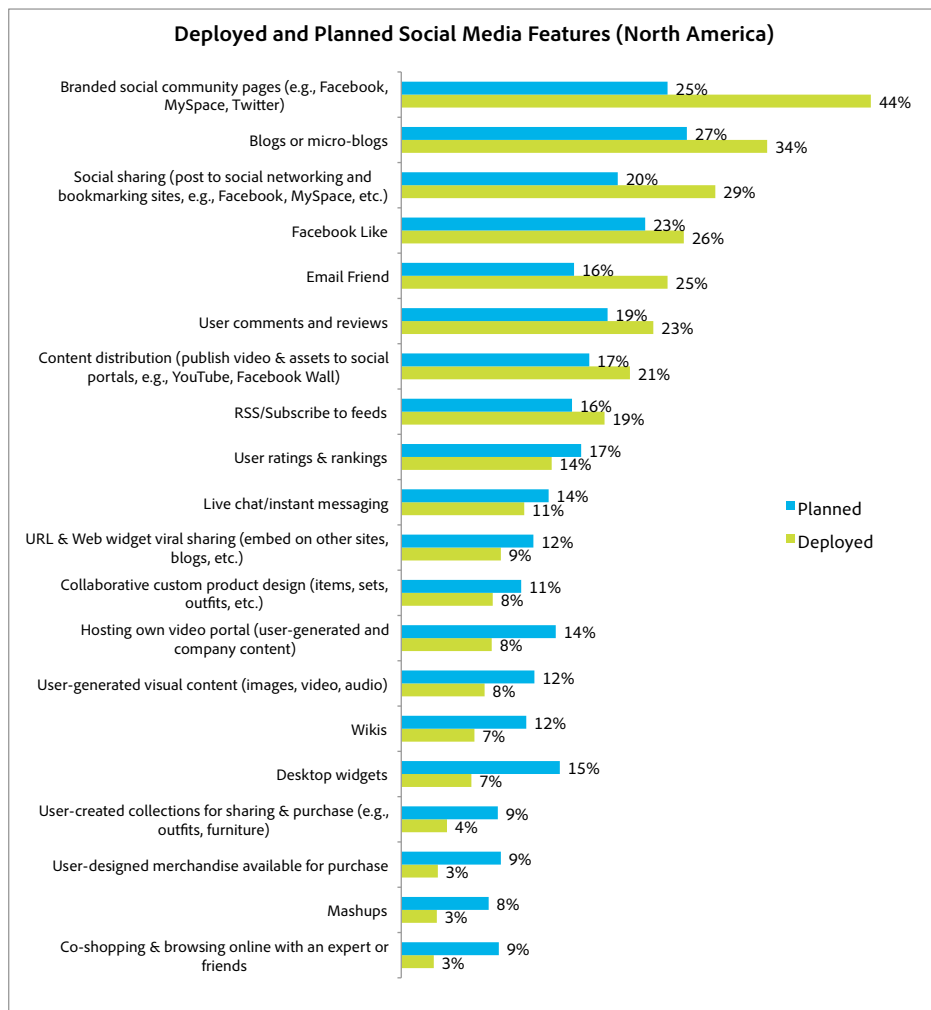


Below are rich media executions showing the largest change in the percentage of people rating it 'very effective':

360-degree spin, +176%
Mix and match, +92%
3-D visualization, +68%
Shop by outfit, room or collection, +64%
Interactive catalogs & brochures, +34%
Interactive design tools, +32%
Audio, +31%
Zoom, +13%
Product comparisons, +12%
Color swatching/colorizing, +10%
Lifestyle imagery (in room, on model), +3%
Side by side comparisons, +2%

Social Media-Based Features

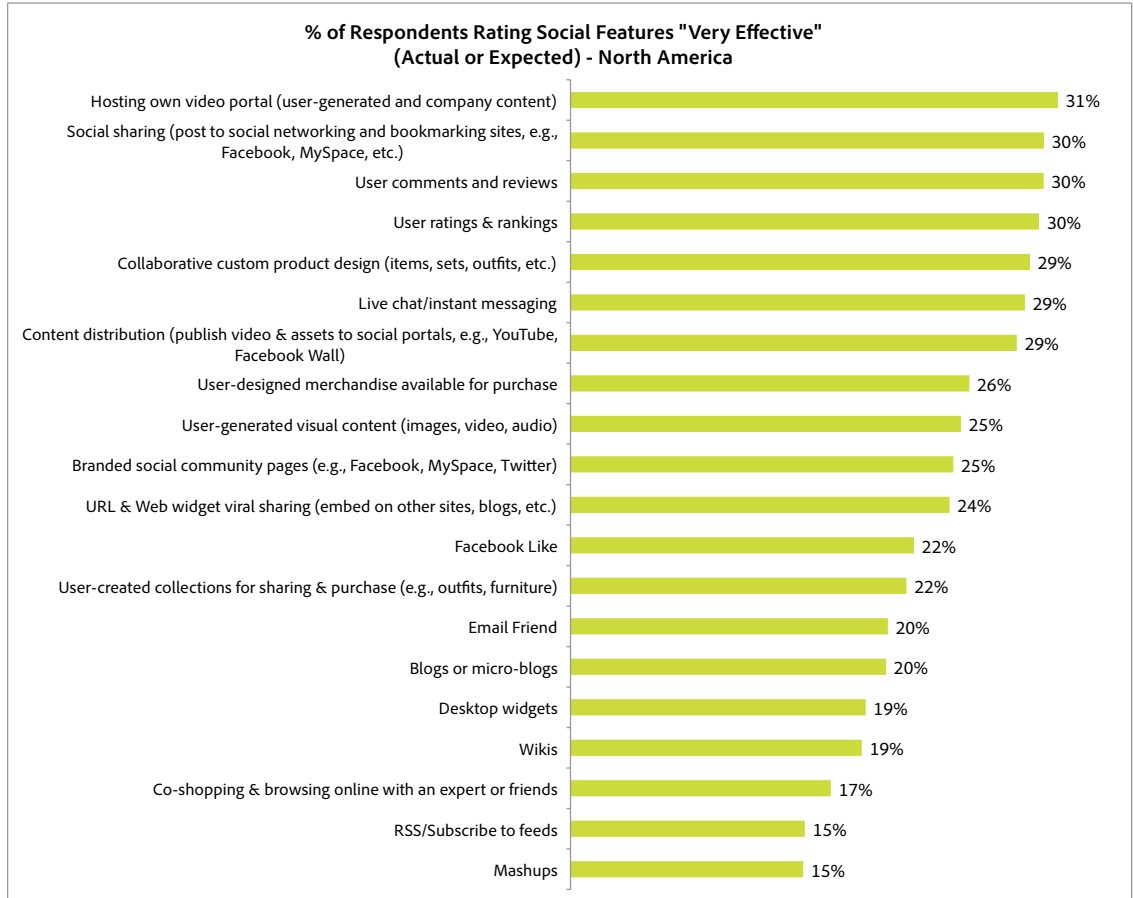
Planned and deployed social media-based features



The following social media features saw the highest year-on-year growth in planned deployments:

Planned
Collaborative custom product design (items, sets, outfits, etc.), +13%
RSS, +5%

Social-media-based features effectiveness

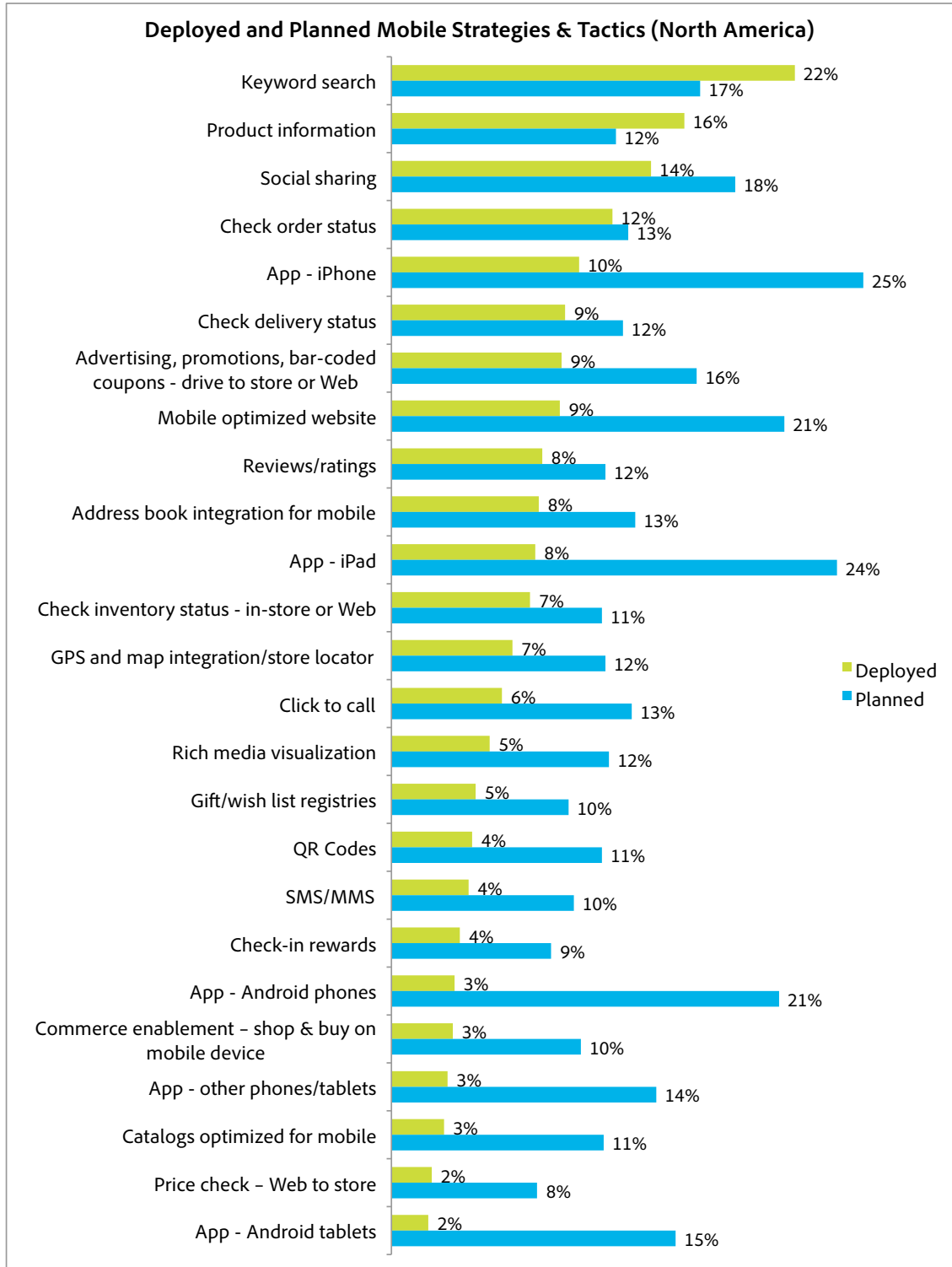


Below are the social executions showing the largest change in the percentage of people rating it "very effective":

Branded social community pages, +35%

Mobile Features (excluding visualization features)

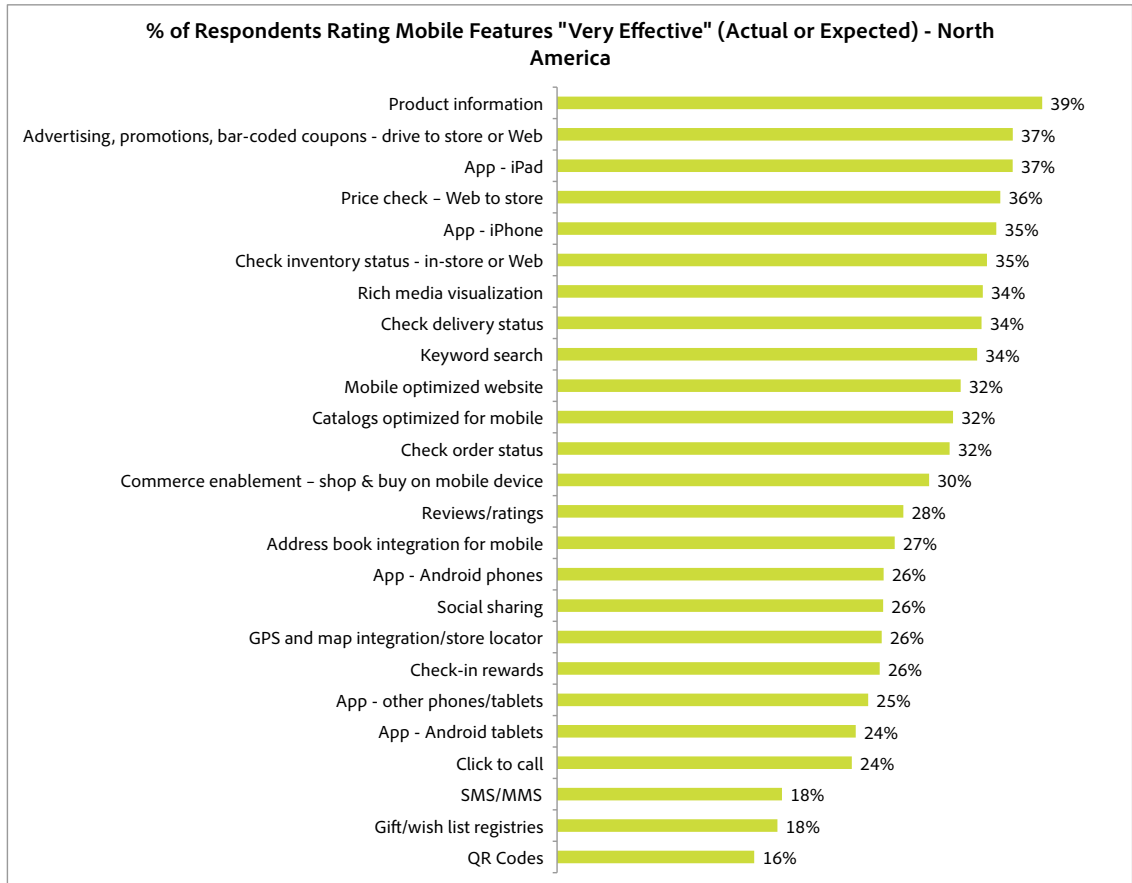
Planned and deployed mobile features



The following mobile features saw the highest year-on-year growth in deployments:

Deployed
Check inventory status - in-store or Web, +13%
Check delivery status, +11%
Advertising, promotions, bar-coded coupons - drive to store or Web, +8%

Mobile features effectiveness

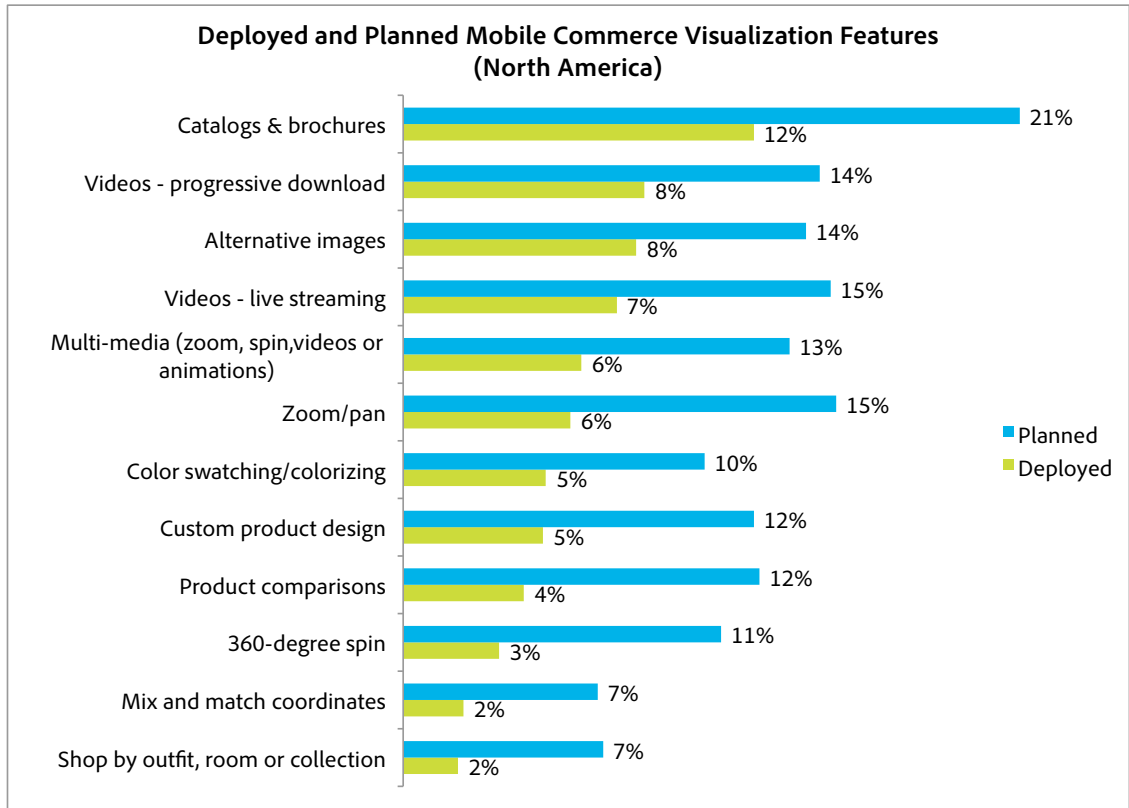


Below are the mobile executions showing the largest change in the percentage of people rating it "very effective":

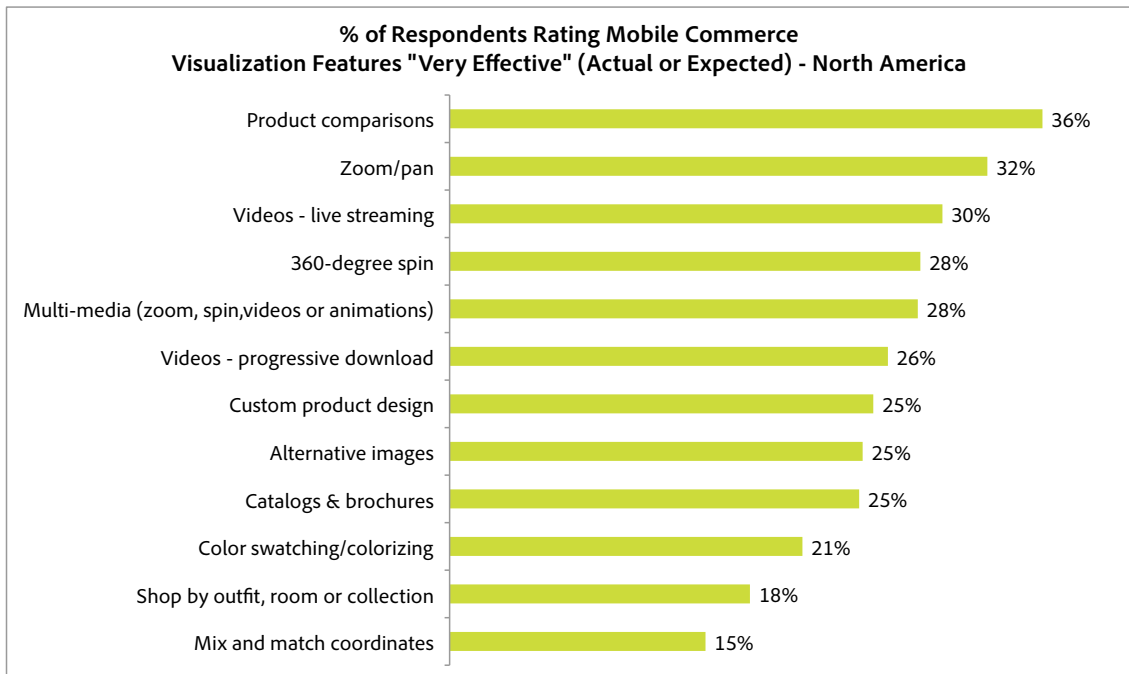
Commerce enablement - shop & buy on mobile device, +184%
Advertising, promotions, bar-coded coupons - drive to store or Web, +120%
Price check - Web to store, +56%
Check inventory status - in-store or Web, +26%
Check delivery status, +21%

Mobile Commerce Visualization features

Planned and deployed mobile visualization features

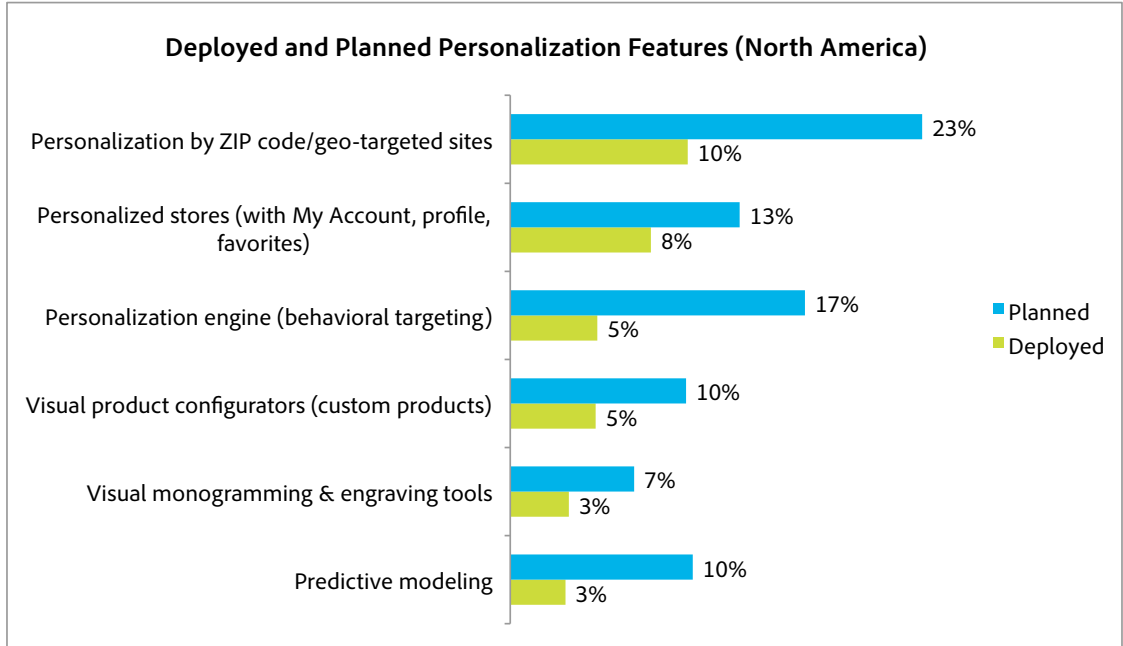


Mobile commerce visualization features effectiveness



Personalization Features

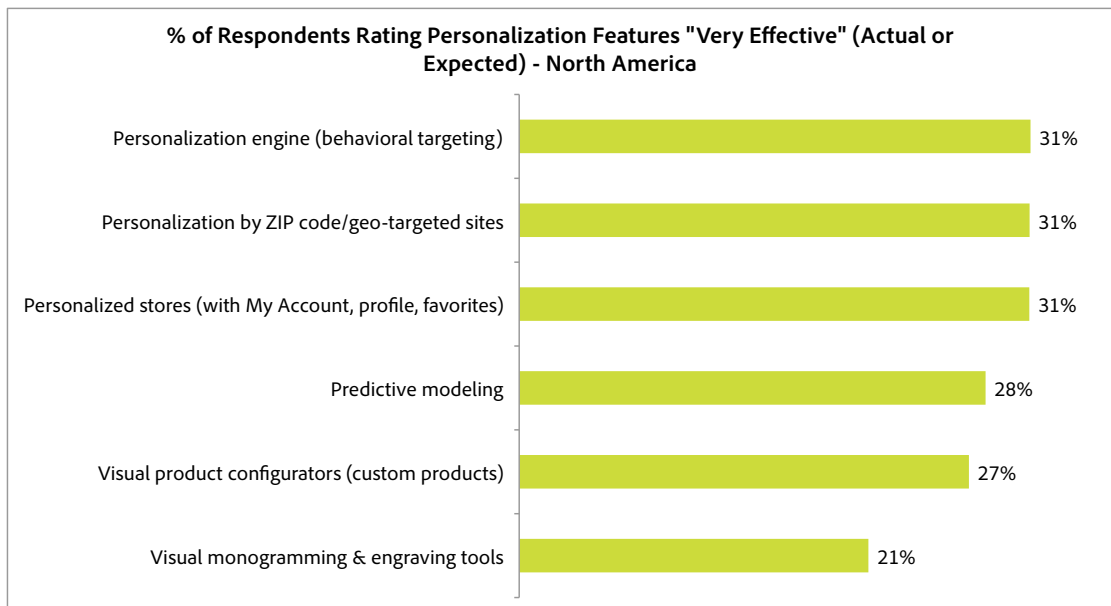
Planned and deployed personalization features



The following personalization features saw the highest year-on-year growth in deployments:

Deployed
Predictive modeling, +66%
Personalization engine (behavioral targeting), +31%
Personalized stores (with My Account, profile, favorites), +5%

Personalization features effectiveness

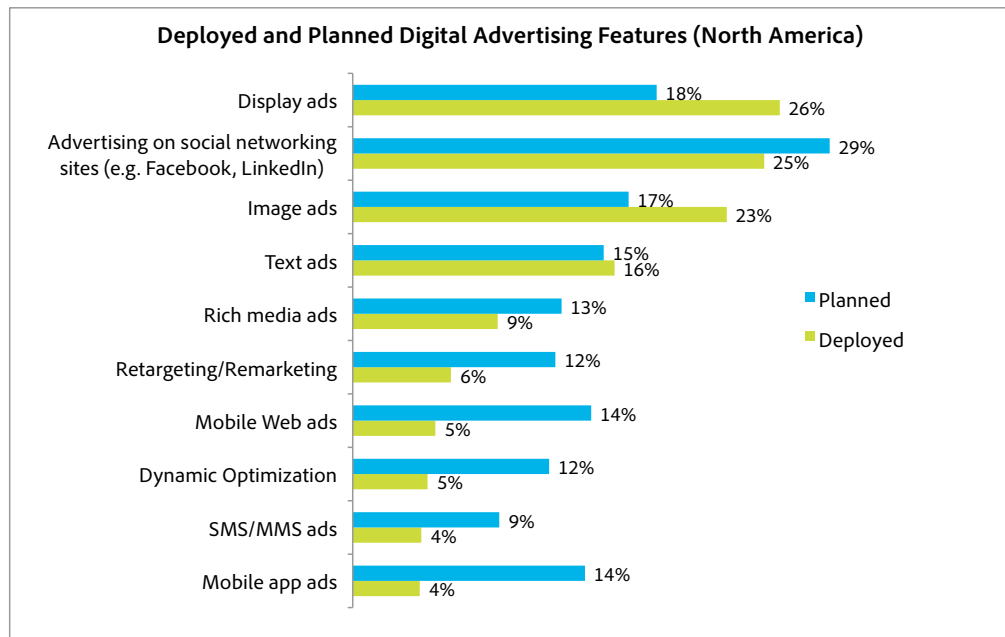


Below are the personalization tactics showing the largest change in the percentage of people rating it "very effective":

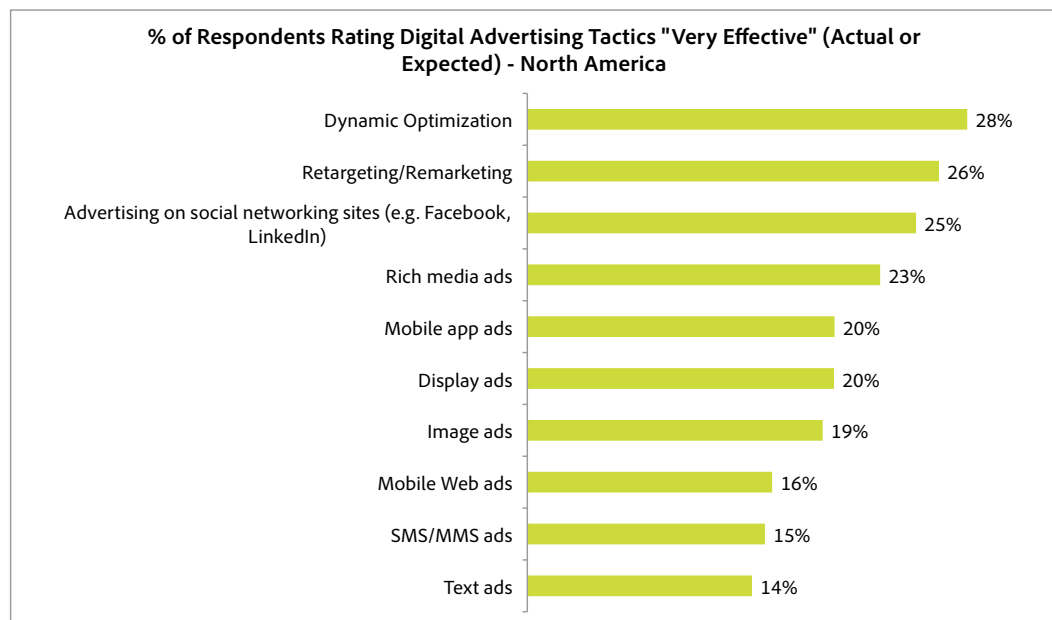
Predictive modeling, +119%
Visual monogramming & engraving tools, +105%
Personalized stores (with My Account, profile, favorites), +17%
Personalization engine (behavioral targeting), +14%
Visual product configurators, +6%

Digital Advertising Executions

Planned and deployed digital advertising executions and strategies

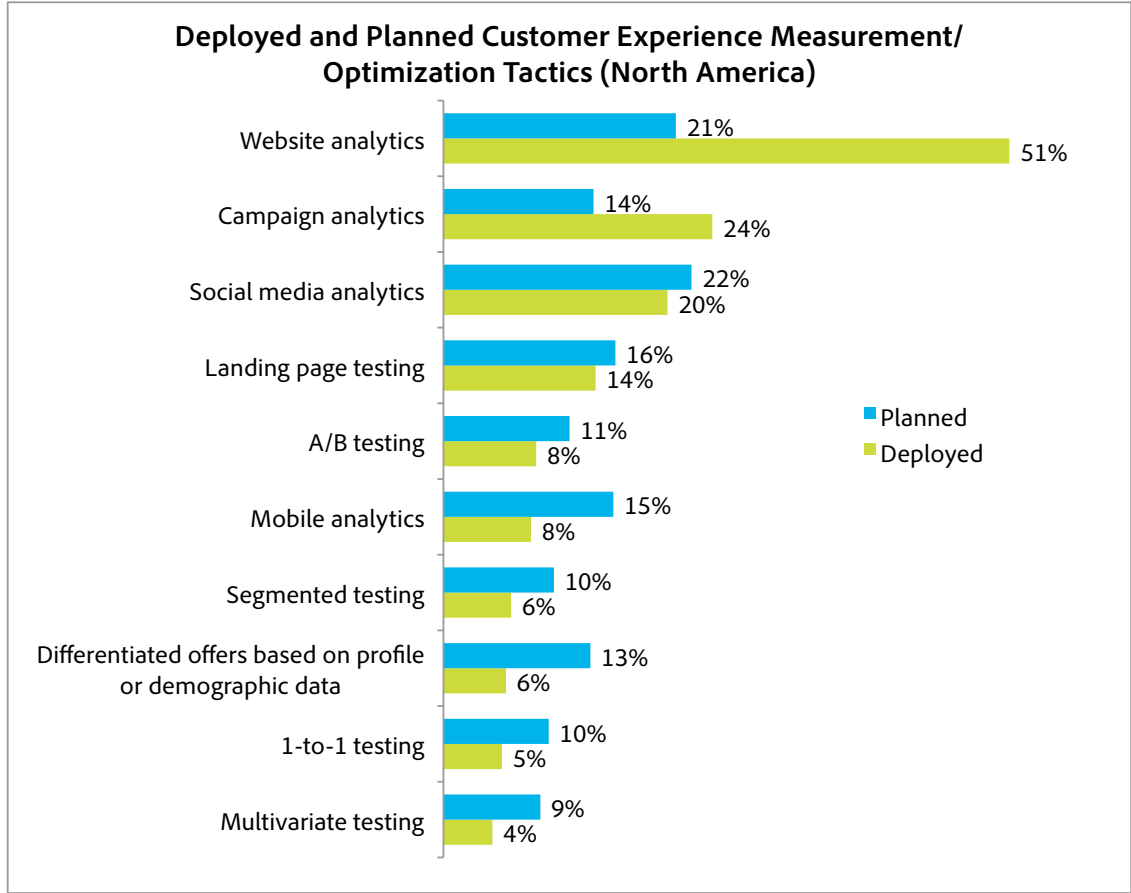


Digital advertising effectiveness

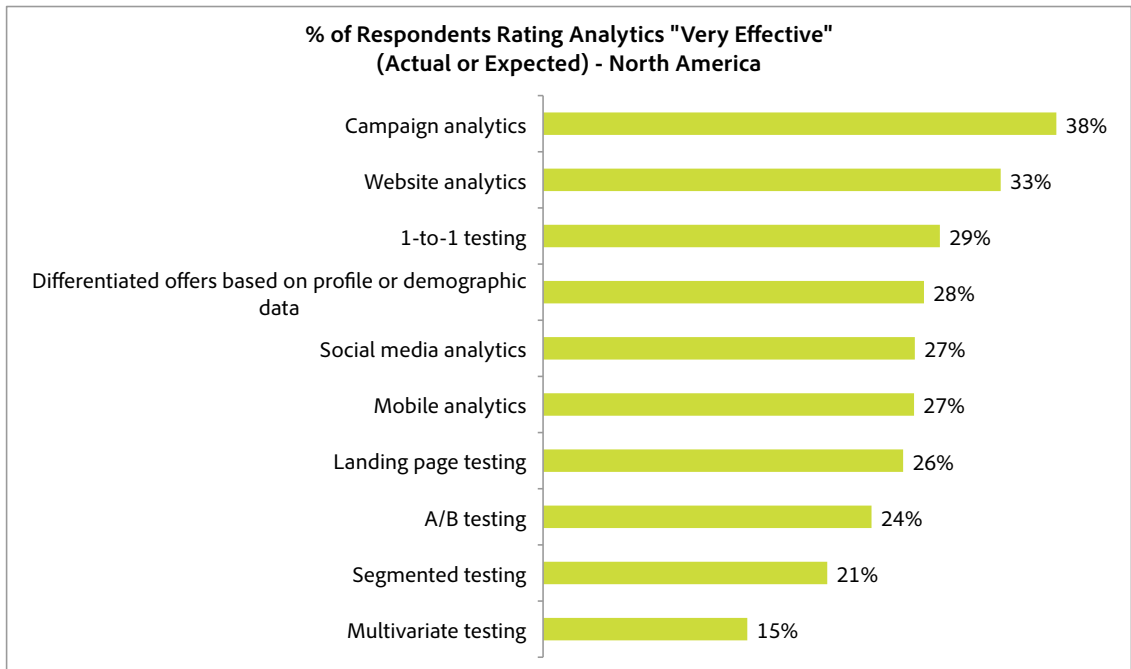


Analytics

Planned and deployed analytics

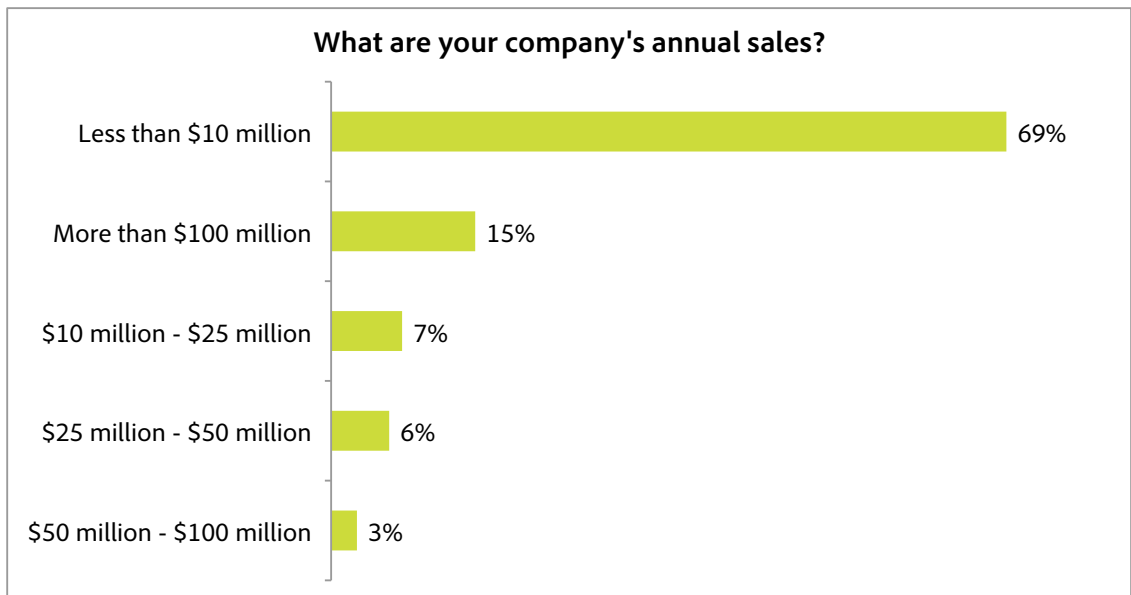
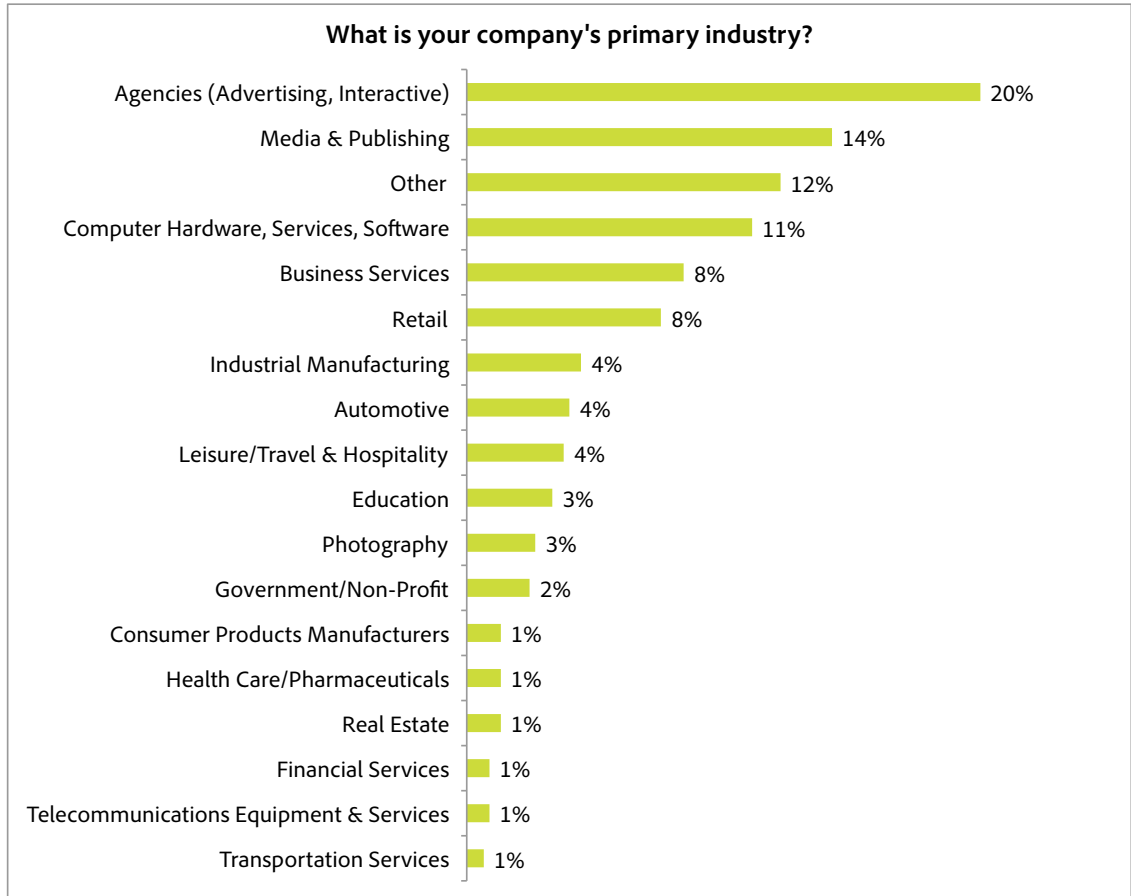


Analytics effectiveness

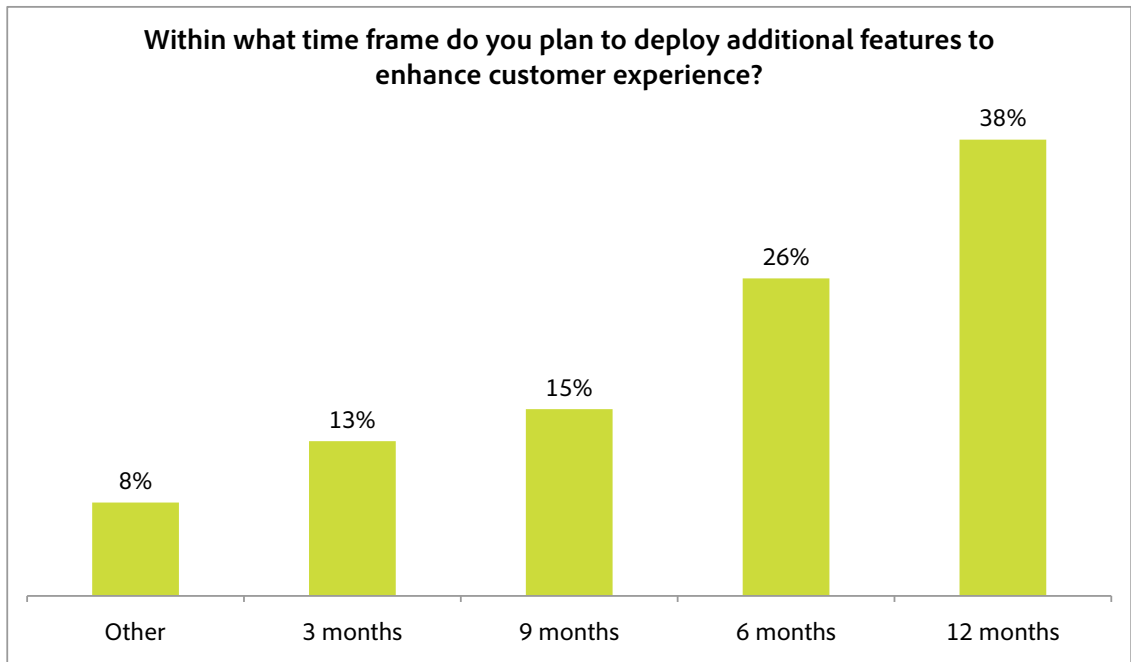
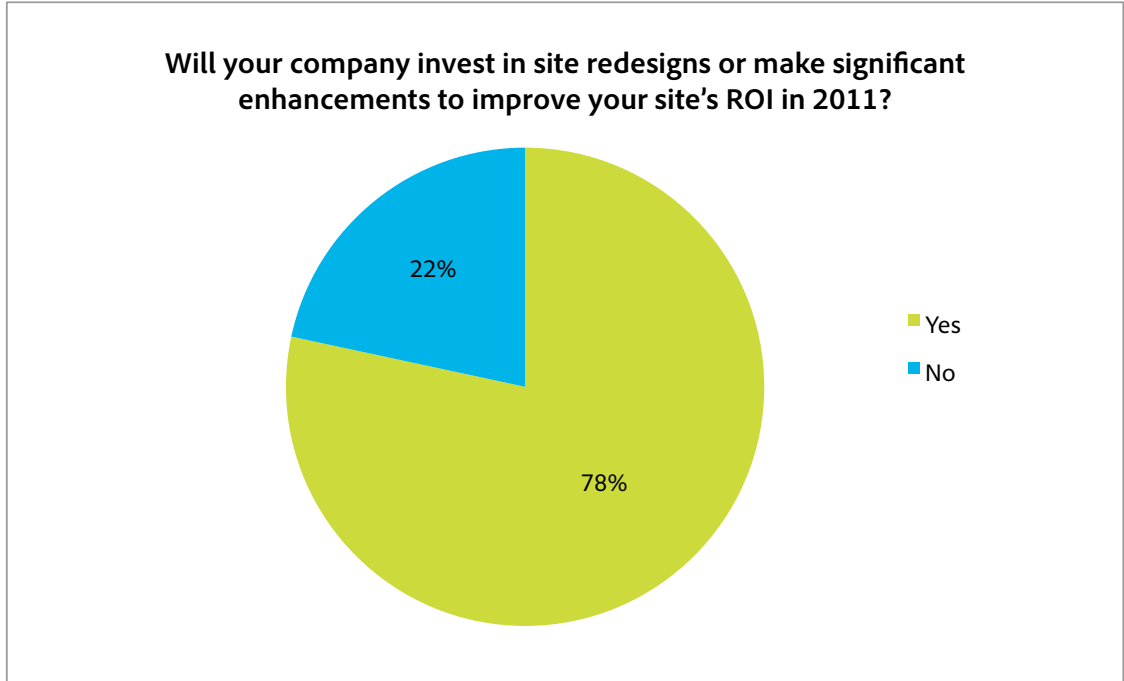


Appendix 2 – EMEA Survey Results

Participant Profile

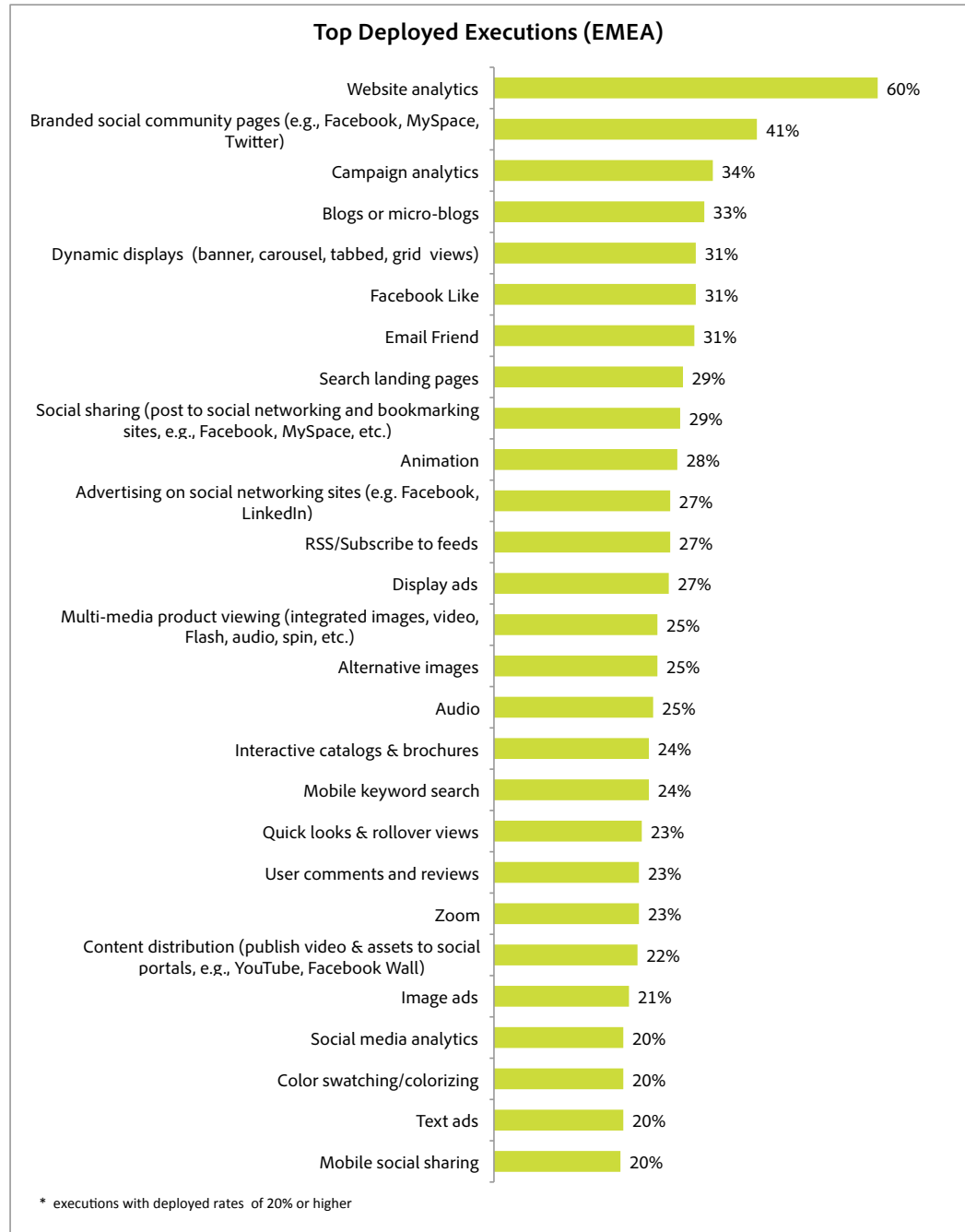


Investing in Online Enhancements



Results by Deployed, Planned and Very Effective Metrics

Deployed Executions



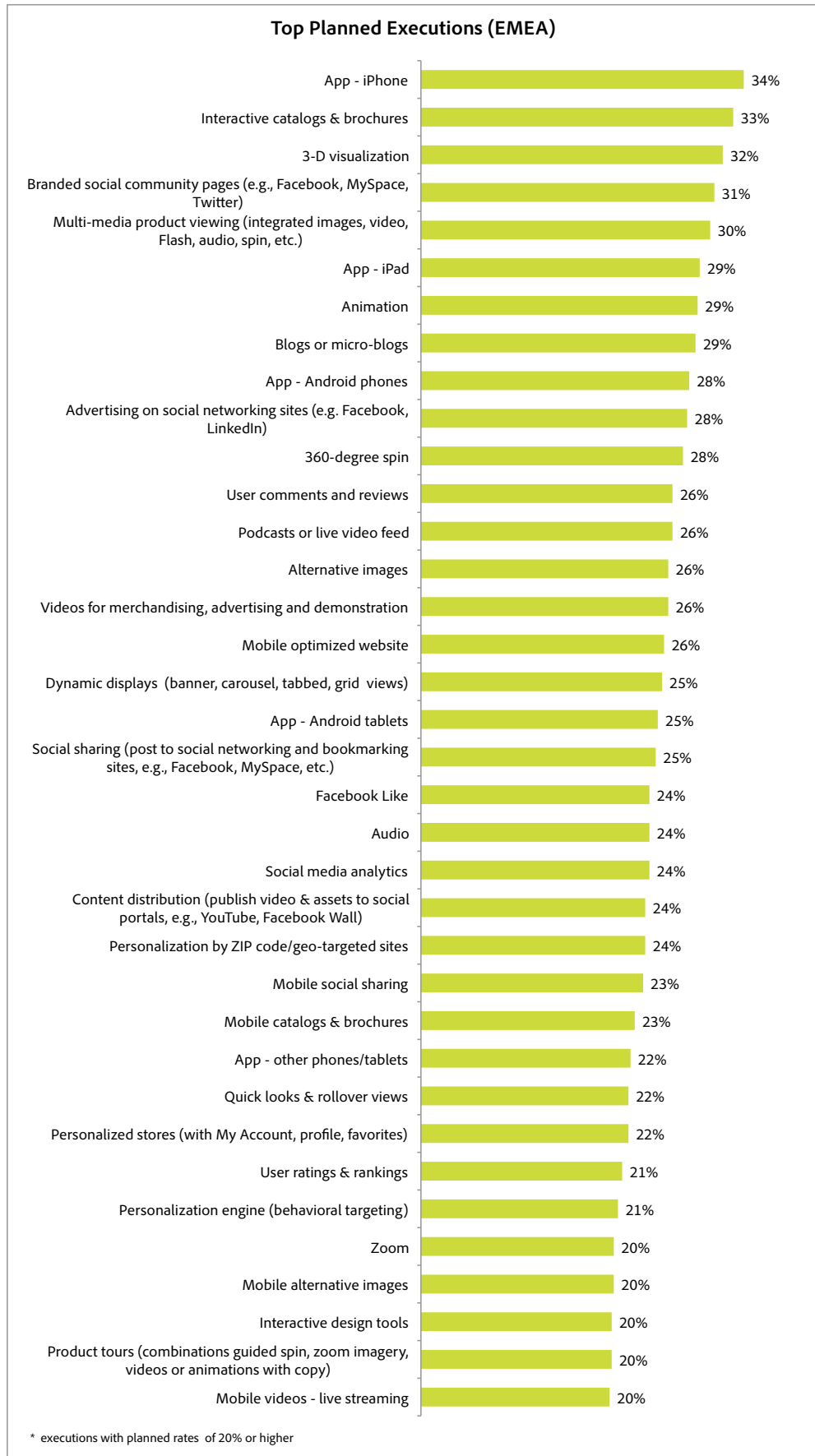
Other deployed executions

Mobile product information	19%
Videos for merchandising, advertising and demonstration	19%
Landing page testing	17%
User ratings & rankings	17%
App - iPhone	16%
Microsites/brand boutiques	16%

Other deployed executions	
Mobile optimized website	14%
Product comparisons	14%
Live chat/instant messaging	14%
Interactive design tools	14%
A/B testing	13%
Podcasts or live video feed	13%
Personalization by ZIP code/geo-targeted sites	13%
SMS/MMS	12%
Mobile check order status	12%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	11%
Hosting own video portal (user-generated and company content)	11%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	11%
Personalized stores (with My Account, profile, favorites)	11%
Mobile reviews/ratings	11%
Rich media ads	11%
Mobile catalogs & brochures	11%
Retargeting/Remarketing	11%
Visual filtering & advanced search on product features (size, color, price)	11%
App - iPad	10%
Dynamic Optimization	10%
Collaborative custom product design (items, sets, outfits, etc.)	10%
Mobile check inventory status - in-store or Web	10%
Check delivery status on mobile device	9%
Mobile GPS and map integration/store locator	9%
Mobile analytics	9%
Wikis	9%
Segmented testing	9%
Side by side comparisons	9%
Alternative images	9%
Mobile Web ads	9%
1-to-1 testing	9%
Lifestyle imagery (in room, on model)	9%
360-degree spin	8%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	8%
Desktop widgets	8%
Mobile videos - progressive download	8%
3-D visualization	8%
Mobile click to call	8%

Other deployed executions	
Multivariate testing	8%
SMS/MMS ads	8%
Mobile color swatching/colorizing	8%
User-generated visual content (images, video, audio)	8%
Address book integration for mobile	8%
Mix and match	8%
Mobile videos - live streaming	8%
Mobile zoom/pan	8%
App - Android phones	7%
Mobile app ads	7%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	7%
Mobile rich media visualization	7%
Shop by outfit, room or collection	7%
QR Codes	7%
Catalogs optimized for mobile	6%
Co-shopping & browsing online with an expert or friends	6%
Mobile multi-media (zoom, spin, videos or animations)	6%
Mobile gift/wish list registries	6%
Mobile product comparisons	6%
Commerce enablement - shop & buy on mobile device	6%
Mashups	6%
Personalization engine (behavioral targeting)	5%
App - other phones/tablets	5%
App - Android tablets	5%
Differentiated offers based on profile or demographic data	5%
Mobile custom product design	5%
Mobile mix and match coordinates	5%
Mobile 360-degree spin	5%
Mobile price check - Web to store	4%
Mobile check-in rewards	4%
Visual product configurators (custom products)	4%
User-designed merchandise available for purchase	4%
Predictive modeling	4%
User-created collections for sharing & purchase (e.g., outfits, furniture)	3%
Visual monogramming & engraving tools	3%
Mobile shop by outfit, room or collection	3%
Virtual fitting room	3%

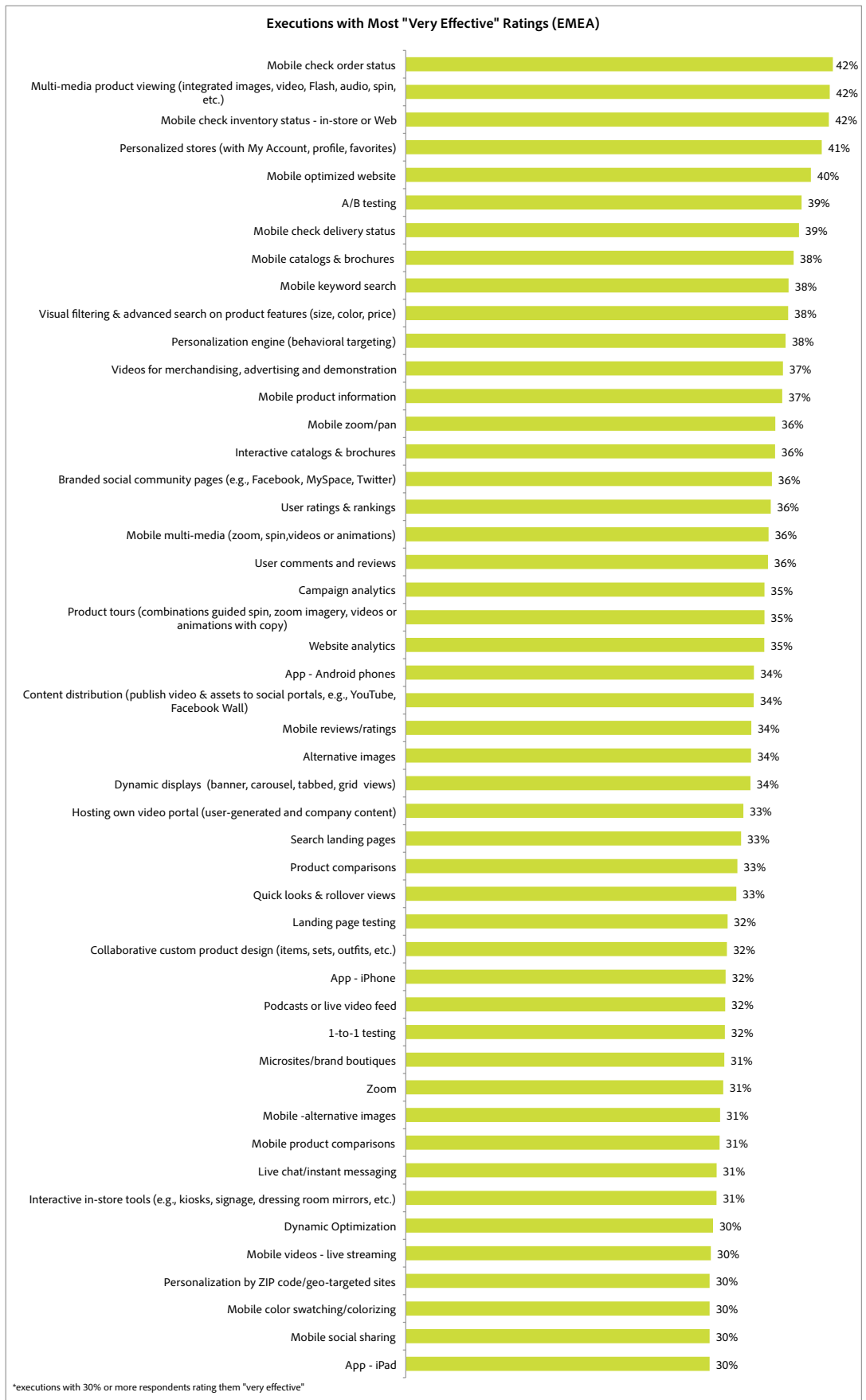
Planned Executions



Other planned executions	
Email Friend	19%
Microsites/brand boutiques	19%
Product comparisons	19%
Address book integration for mobile	19%
RSS/Subscribe to feeds	19%
Landing page testing	19%
Mobile app ads	19%
Search landing pages	18%
Website analytics	18%
Mobile keyword search	18%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	18%
Differentiated offers based on profile or demographic data	18%
Hosting own video portal (user-generated and company content)	18%
User-generated visual content (images, video, audio)	18%
Mobile 360-degree spin	18%
Check delivery status on mobile device	17%
Desktop widgets	17%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	17%
Mobile analytics	17%
Dynamic Optimization	17%
Mobile zoom/pan	17%
Catalogs optimized for mobile	17%
Retargeting/Remarketing	17%
Side by side comparisons	17%
Mobile videos - progressive download	17%
Mobile check order status	16%
Mobile Web ads	16%
Live chat/instant messaging	16%
Display ads	16%
Mobile click to call	16%
Image ads	16%
Mobile reviews/ratings	16%
Collaborative custom product design (items, sets, outfits, etc.)	16%
Mobile product comparisons	16%
Visual filtering & advanced search on product features (size, color, price)	15%
Mobile check inventory status - in-store or Web	15%
Campaign analytics	15%
Color swatching/colorizing	15%
Lifestyle imagery (in room, on model)	15%

Other planned executions	
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	15%
1-to-1 testing	15%
Rich media ads	15%
Mobile multi-media (zoom, spin, videos or animations)	15%
Mobile product information	15%
Mobile GPS and map integration/store locator	14%
Commerce enablement – shop & buy on mobile device	14%
A/B testing	14%
Mobile rich media visualization	14%
SMS/MMS	14%
Mobile check-in rewards	14%
Mobile gift/wish list registries	14%
Visual product configurators (custom products)	14%
Multivariate testing	13%
Wikis	13%
Mix and match	13%
Predictive modeling	13%
Text ads	13%
Segmented testing	13%
Co-shopping & browsing online with an expert or friends	13%
Mobile custom product design	13%
User-designed merchandise available for purchase	13%
SMS/MMS ads	12%
Virtual fitting room	12%
QR Codes	12%
User-created collections for sharing & purchase (e.g., outfits, furniture)	12%
Shop by outfit, room or collection	11%
Mashups	11%
Mobile price check – Web to store	11%
Mobile color swatching/colorizing	11%
Visual monogramming & engraving tools	11%
Mobile mix and match coordinates	10%
Mobile shop by outfit, room or collection	10%

Executions drawing the most 'very effective' ratings



Other executions garnering 'very effective' ratings	
Interactive design tools	29%
Retargeting/Remarketing	29%
Lifestyle imagery (in room, on model)	29%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	29%
Social sharing (post to social networking and bookmarking sites, e.g., Facebook, MySpace, etc.)	29%
3-D visualization	28%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	28%
Address book integration for mobile	28%
Catalogs optimized for mobile	28%
Social media analytics	28%
Commerce enablement - shop & buy on mobile device	28%
Side by side comparisons	28%
Mobile rich media visualization	28%
Animation	28%
Mobile GPS and map integration/store locator	27%
Image ads	27%
Mobile click to call	27%
Differentiated offers based on profile or demographic data	26%
Blogs or micro-blogs	26%
User-generated visual content (images, video, audio)	26%
Segmented testing	26%
Facebook Like	25%
Mobile price check - Web to store	25%
Color swatching/colorizing	25%
Shop by outfit, room or collection	25%
User-created collections for sharing & purchase (e.g., outfits, furniture)	25%
Mobile Web ads	25%
Mobile 360-degree spin	24%
Co-shopping & browsing online with an expert or friends	24%
App - Android tablets	24%
SMS/MMS	24%
Rich media ads	24%
Multivariate testing	23%
Visual product configurators (custom products)	23%
Visual monogramming & engraving tools	22%
Mobile app ads	22%
Mobile mix and match coordinates	22%
Mobile check-in rewards	22%

Other executions garnering 'very effective' ratings	
Mobile shop by outfit, room or collection	21%
Audio	20%
Mobile gift/wish list registries	20%
Email Friend	19%
Text ads	19%
Mobile videos - progressive download	19%
RSS/Subscribe to feeds	19%
360-degree spin	18%
Mix and match	18%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	18%
App - other phones/tablets	18%
Display ads	18%
User-designed merchandise available for purchase	18%
SMS/MMS ads	18%
Mobile analytics	17%
Virtual fitting room	17%
Wikis	14%
Predictive modeling	14%
QR Codes	13%
Mobile custom product design	13%
Desktop widgets	12%
Mashups	7%

Year-over-Year Trends

This table shows some of the executions having the largest year-to-year growth for each of the three metrics among businesses headquartered in EMEA.

Deployed Tactics

Mobile advertising, promotions, bar-coded coupons - drive to store or Web, +37%

User-designed merchandise available for purchase, +23%

Branded social community pages (e.g., Facebook, MySpace, Twitter), +4%

Planned Tactics

3-D visualization, +17%

Quick looks & rollover views, +17%

Podcasts or live video feed, +8%

Interactive catalogs & brochures, +4%

Branded social community pages (e.g., Facebook, MySpace, Twitter), +4%

"Very Effective" Tactics

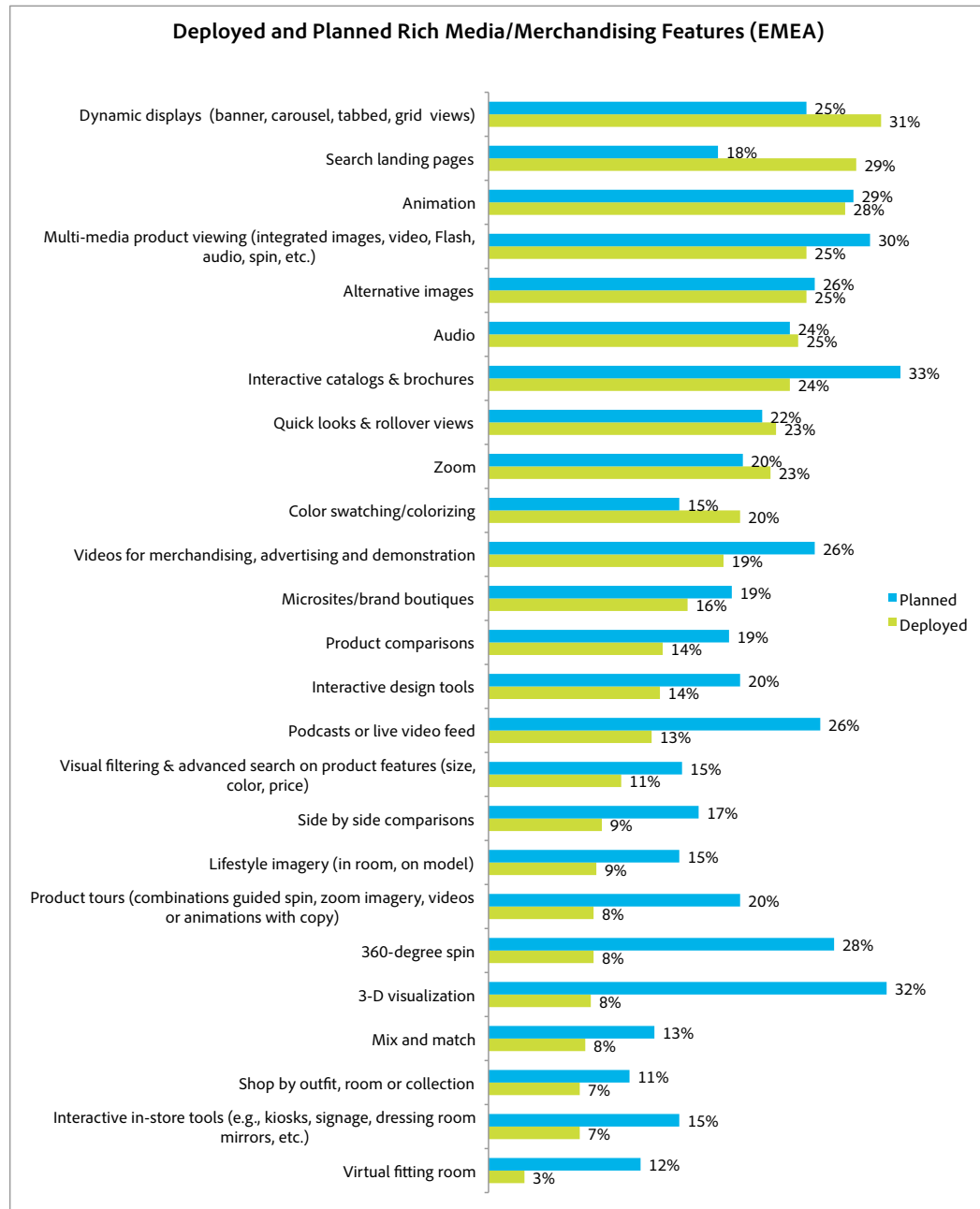
Quick looks & rollover views, +57%
Dynamic displays (banner, carousel, tabbed, grid views), +48%
Visual monogramming & engraving tools, +48%
Live chat/instant messaging, +35%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web, +33%
Color swatching/colorizing, +33%
Mobile check inventory status - in-store or Web, +29%
Audio, +25%
User ratings & rankings, +23%
Personalized stores (with My Account, profile, favorites), +20%
Address book integration for mobile, +20%
Branded social community pages (e.g., Facebook, MySpace, Twitter), +20%
Mobile commerce enablement - shop & buy on mobile device, +20%
Videos for merchandising, advertising and demonstration, +19%
Mobile check delivery status, +13%
Blogs or micro-blogs, 12%
User comments and review, +11%
Interactive design tools, +10%
Lifestyle imagery (in room, on model), +8%

Results by Category

Below are the EMEA results for each tactical category across planned, deployed and effectiveness.

Rich Media/Merchandising

Planned and deployed rich merchandising features



The following rich media features saw the highest year-on-year growth in planned deployments for EMEA:

Planned

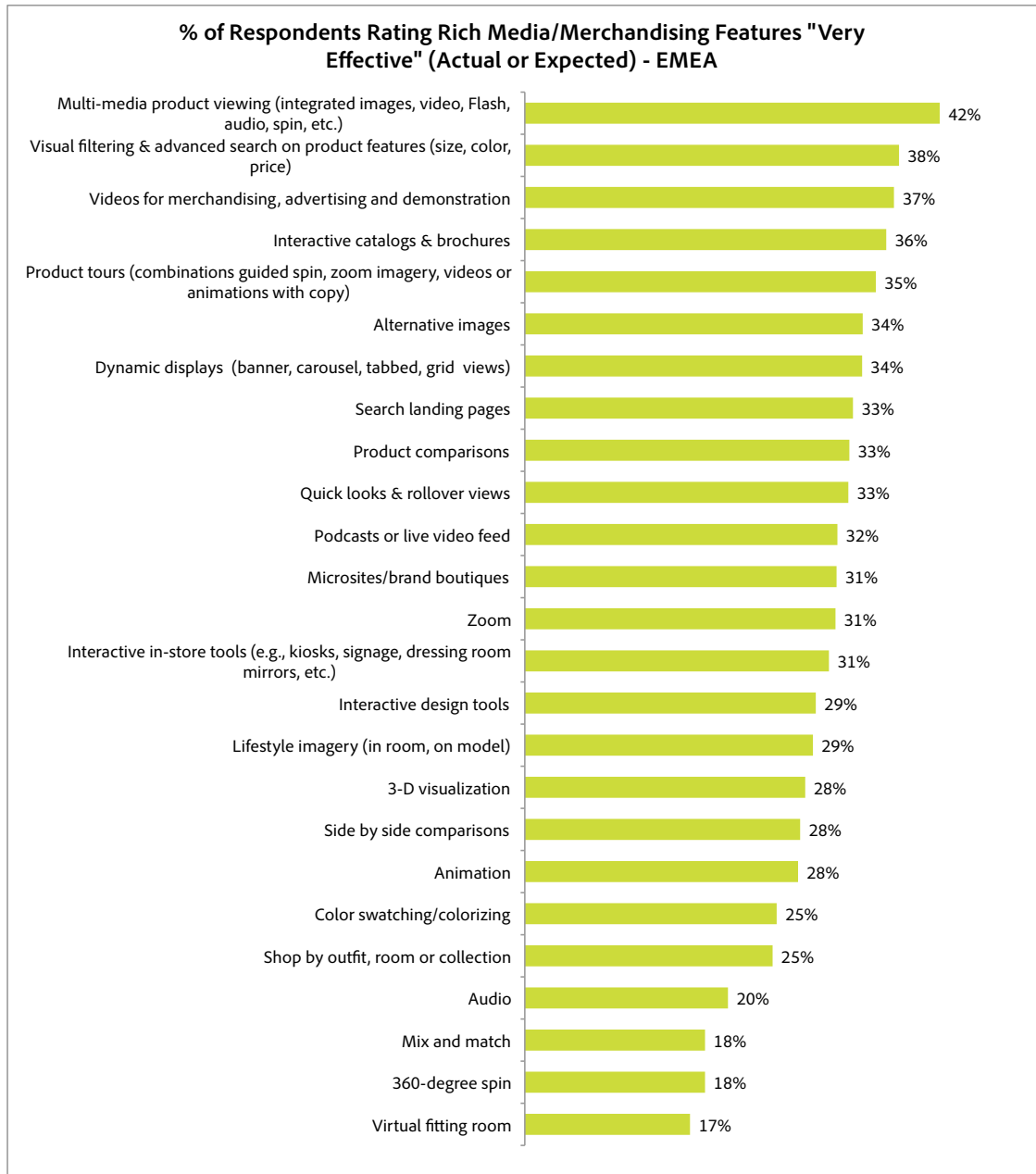
3-D visualization, +17%

Quick looks & rollover views, +17%

Podcasts or live video feed, +8%

Interactive catalogs & brochures, +4%

Rich merchandising features effectiveness

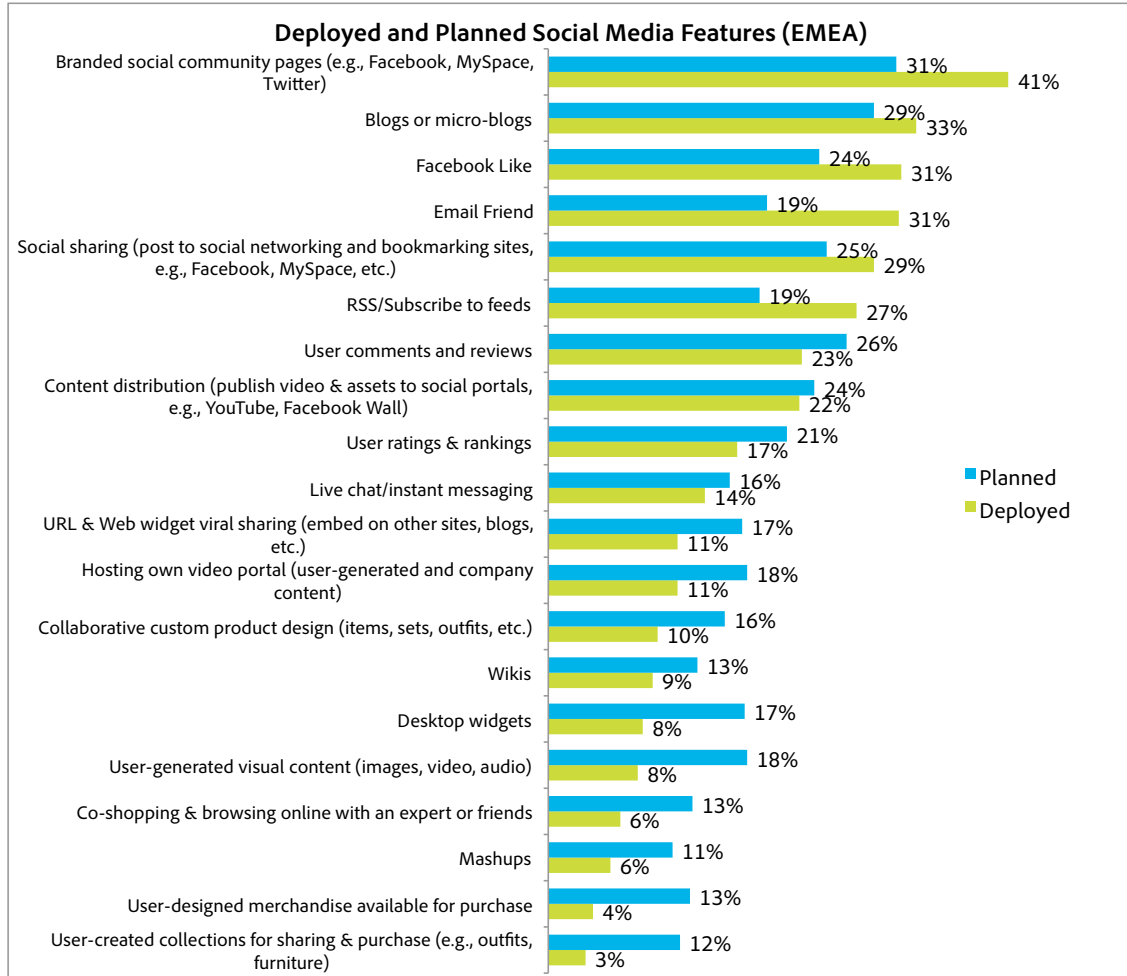


Below are rich media executions showing the largest change in the percentage of people rating it 'very effective':

Quick looks & rollover views, +57%
Dynamic displays (banner, carousel, tabbed, grid views), +48%
Color swatching/colorizing, +33%
Audio, +25%
Videos for merchandising, advertising and demonstration, +19%
Interactive design tools, +10%
Lifestyle imagery (in room, on model), +8%

Social Media-Based Features

Planned and deployed social media-based features



The following social media features saw the highest year-on-year growth in deployment and planned deployments:

Deployed

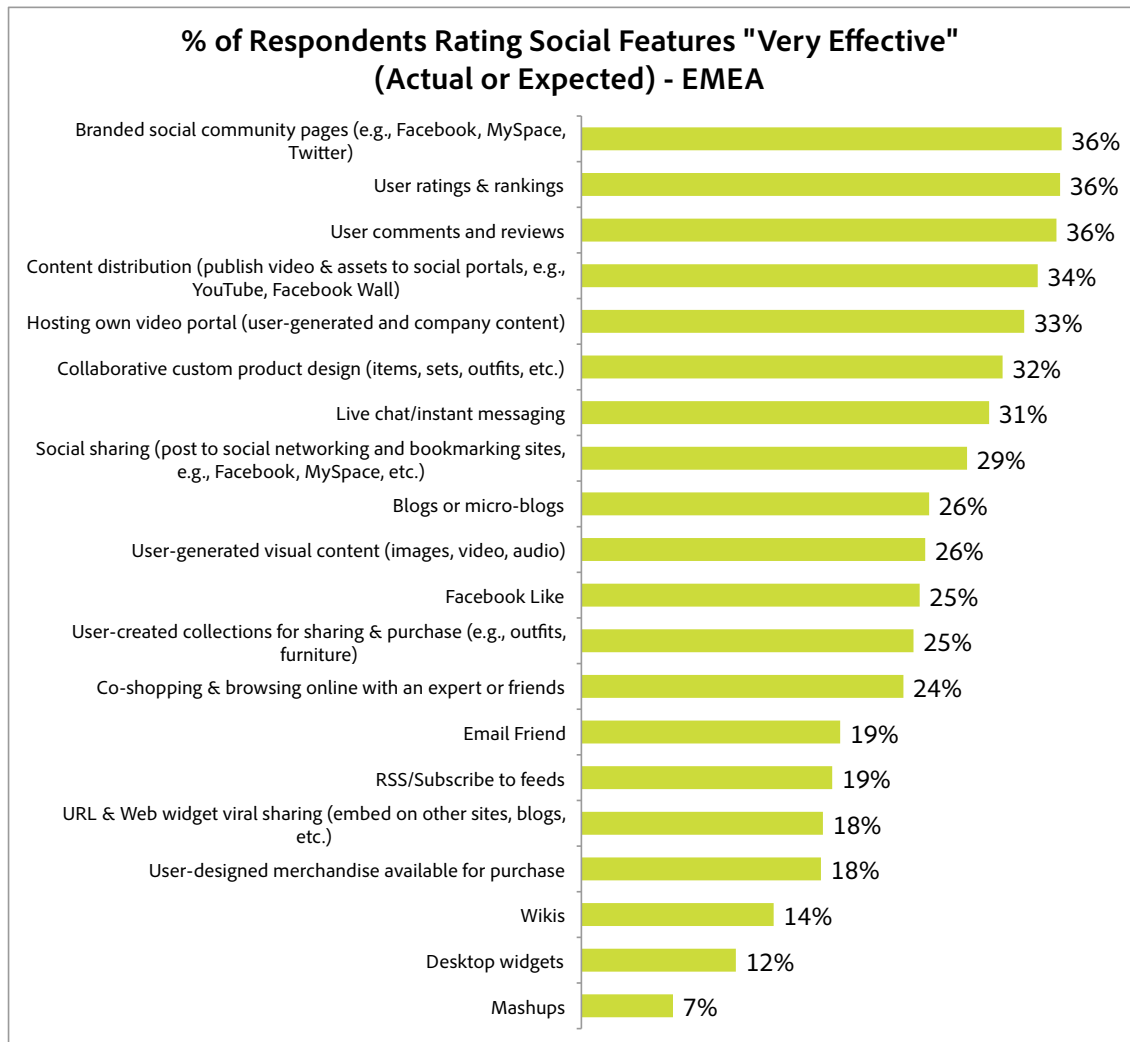
User-designed merchandise available for purchase, +23%

Branded social community pages (e.g., Facebook, MySpace, Twitter), +4%

Planned

Branded social community pages (e.g., Facebook, MySpace, Twitter), +4%

Social-media-based features effectiveness

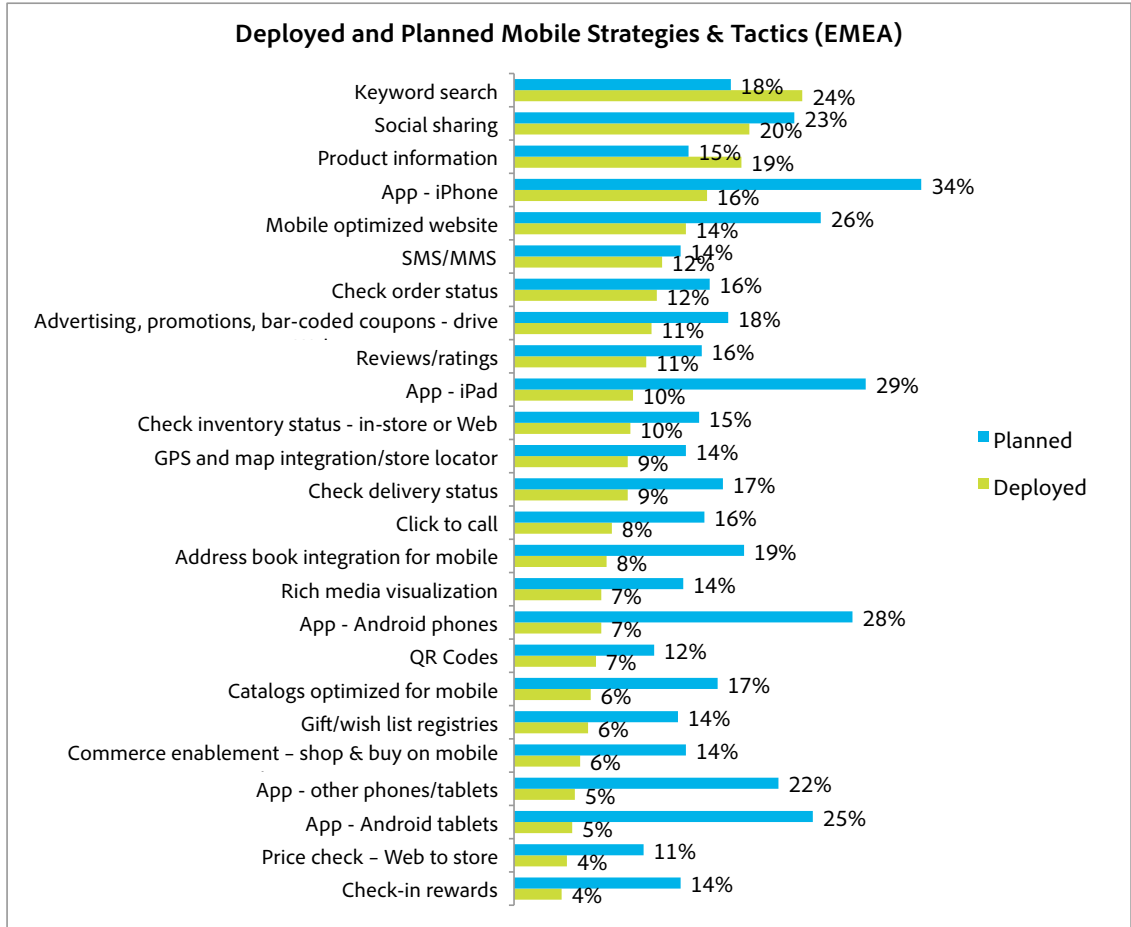


Below are the social executions showing the largest change in the percentage of people rating it "very effective":

Live chat/instant messaging, +35%
User ratings & rankings, +23%
Branded social community pages (e.g., Facebook, MySpace, Twitter), +20%
Blogs or micro-blogs, +12%
User comments and reviews, +11%

Mobile Features (excluding visualization features)

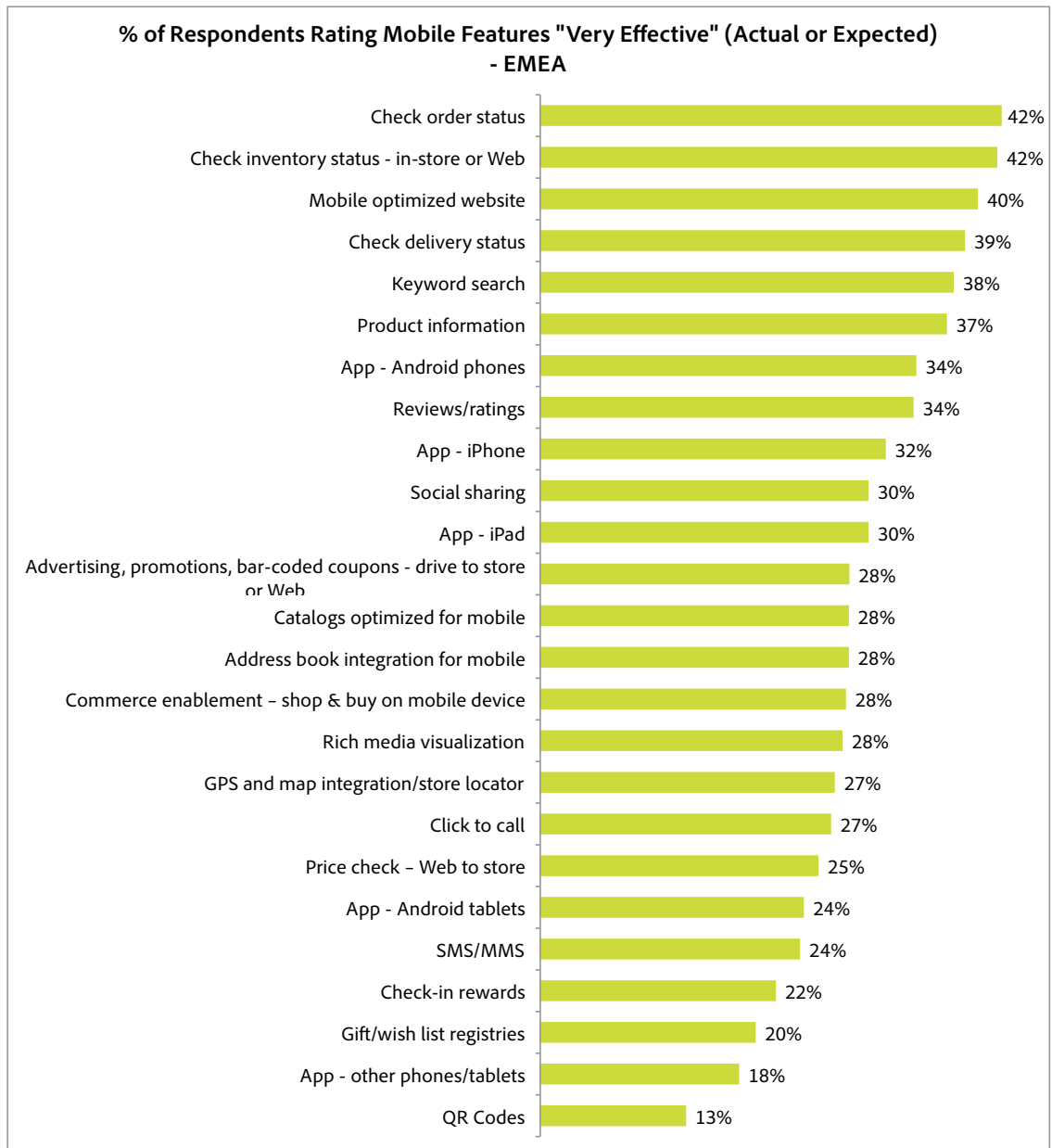
Planned and deployed mobile features



The following mobile feature saw the highest year-on-year growth in deployment:

Deployed
Advertising, promotions, bar-coded coupons - drive to store or Web, +37%

Mobile features effectiveness

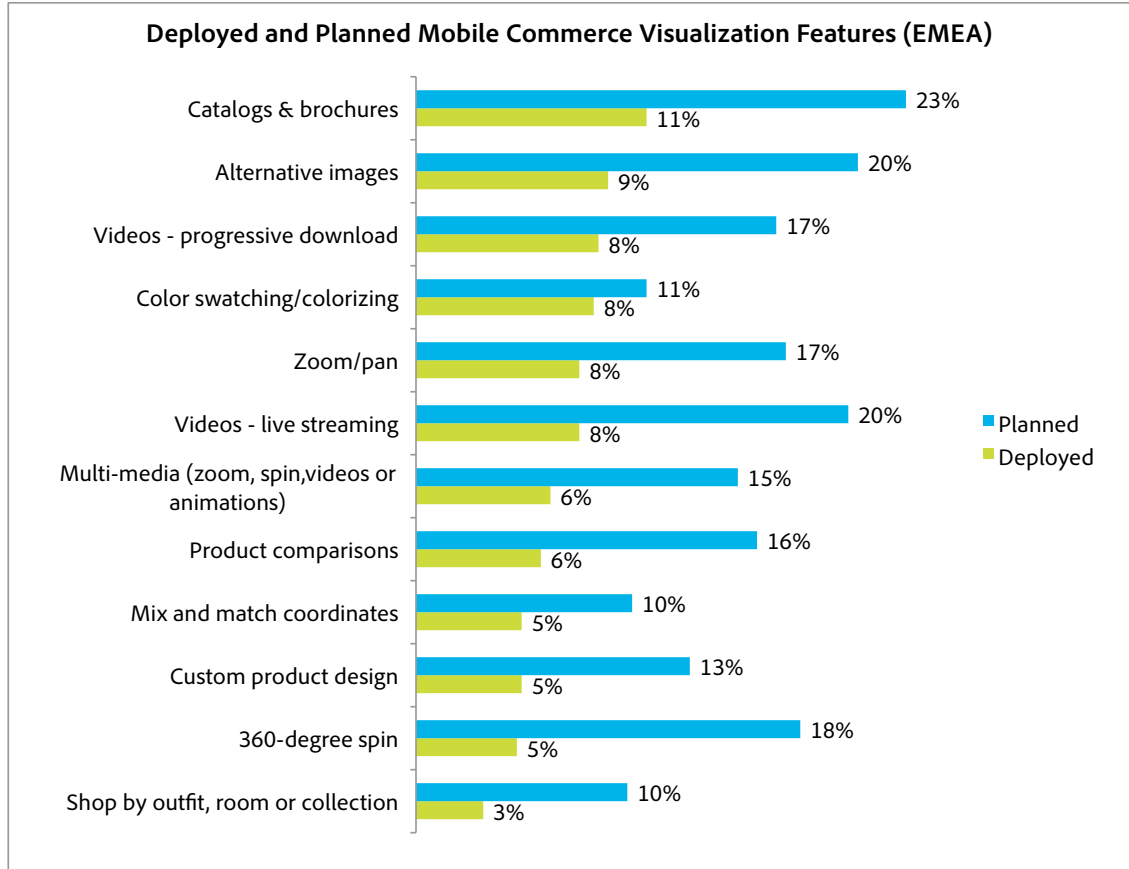


Below are the mobile executions showing the largest change in the percentage of people rating it "very effective":

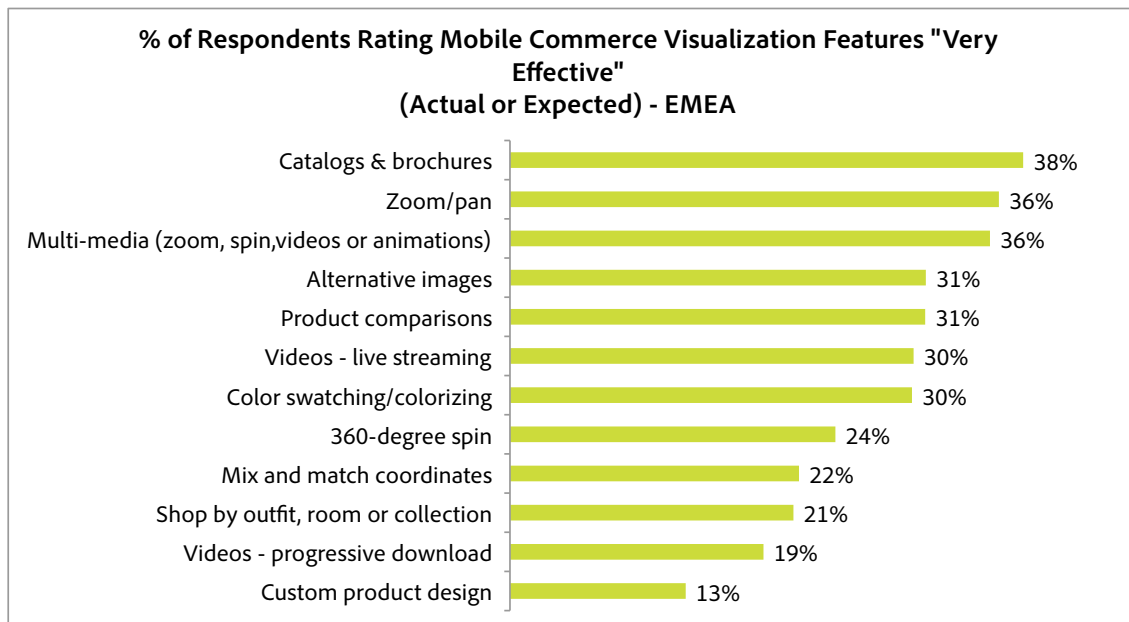
- Mobile advertising, promotions, bar-coded coupons - drive to store or Web, +33%
- Mobile check inventory status - in-store or Web, +29%
- Address book integration for mobile, +20%
- Mobile commerce enablement - shop & buy on mobile device, +20%
- Mobile check delivery status, +13%

Mobile Commerce Visualization Features

Planned and deployed mobile commerce visualization features

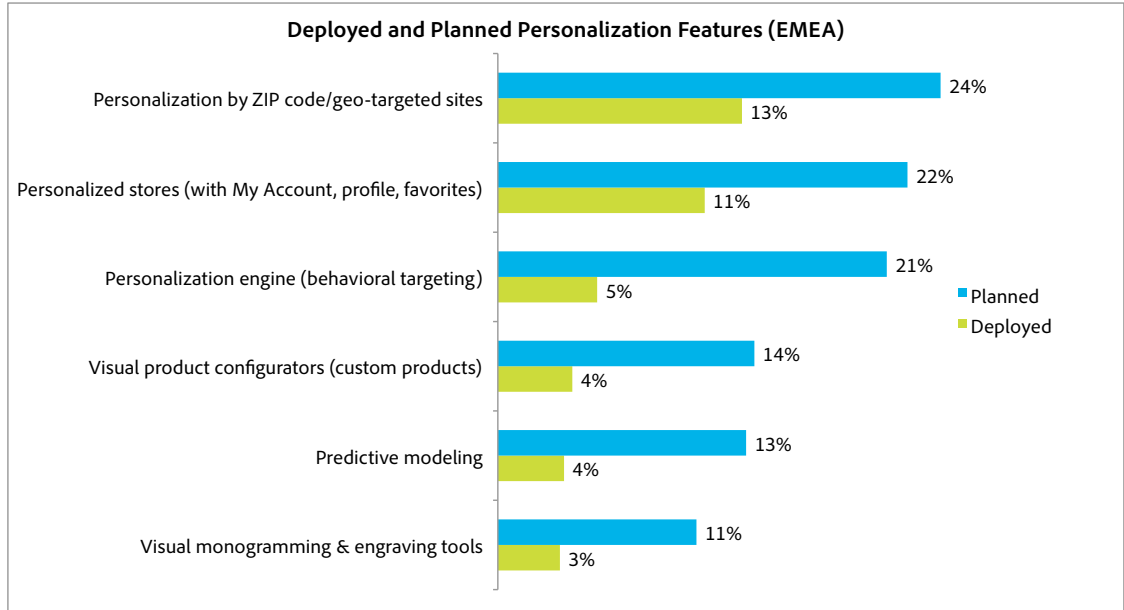


Mobile commerce visualization features effectiveness

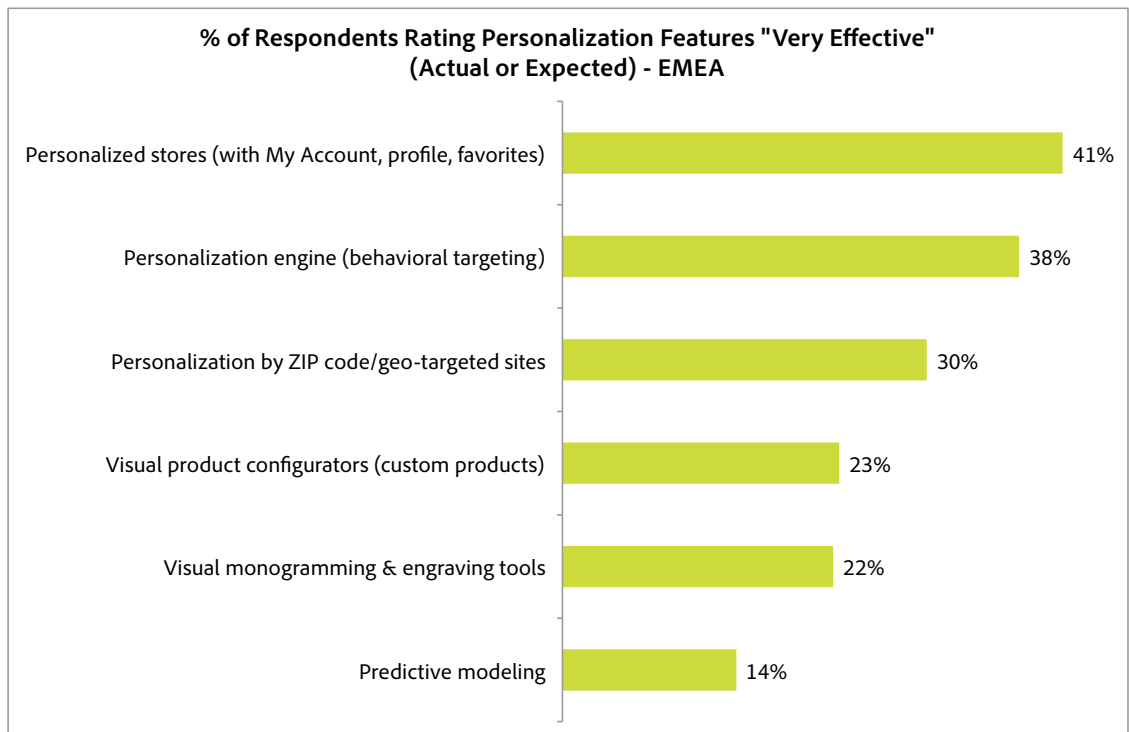


Personalization Features

Planned and deployed personalization features



Personalization features effectiveness



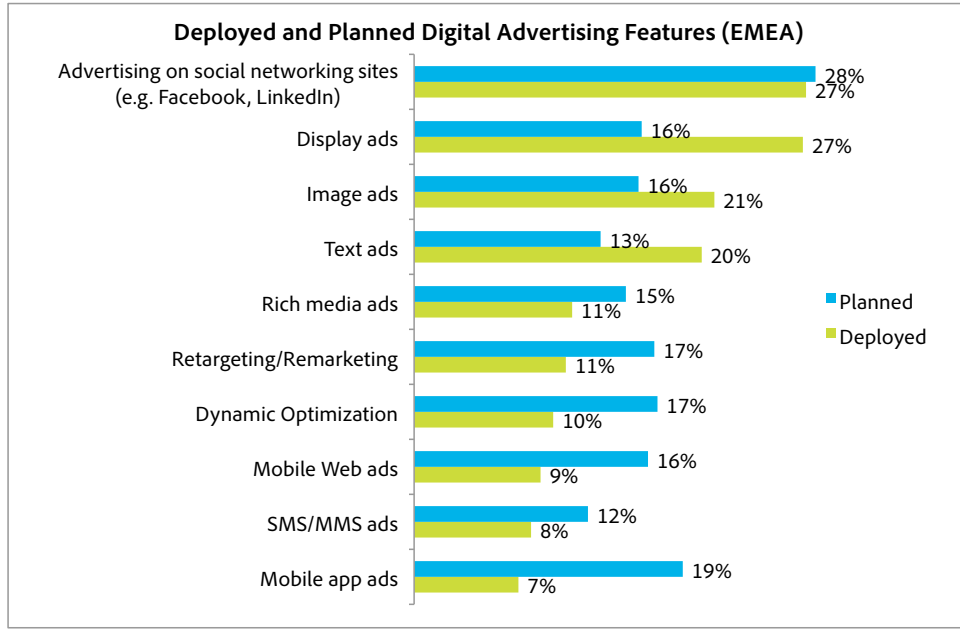
Below are the personalization tactics showing the largest change in the percentage of people rating it "very effective":

Visual monogramming & engraving tools, +48%

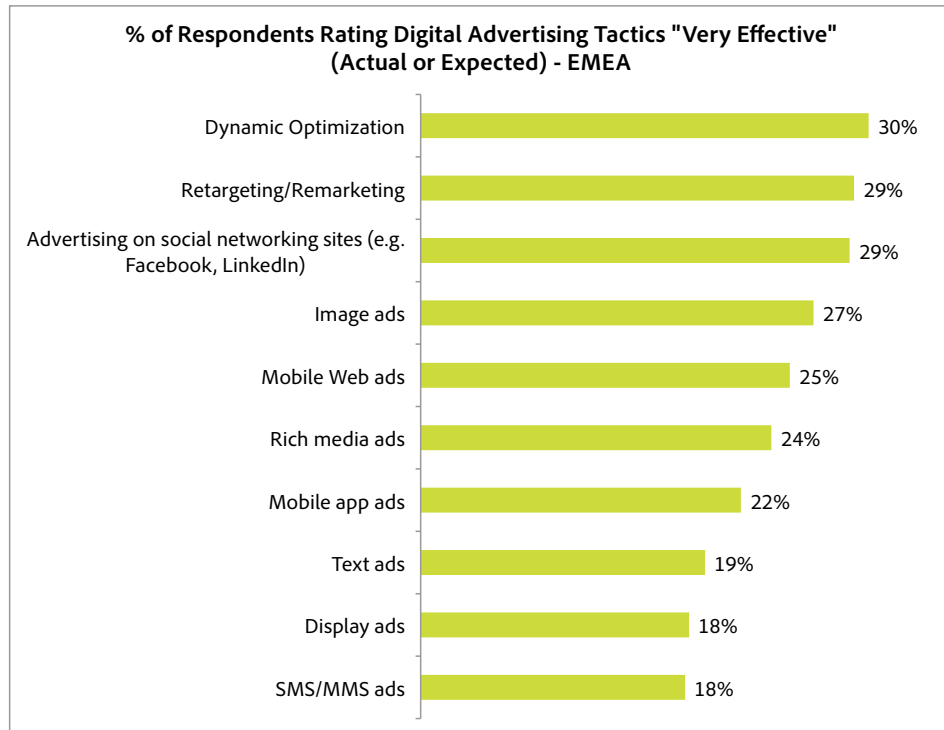
Personalized stores (with My Account, profile, favorites), +20%

Digital Advertising Executions

Planned and deployed digital advertising executions and strategies

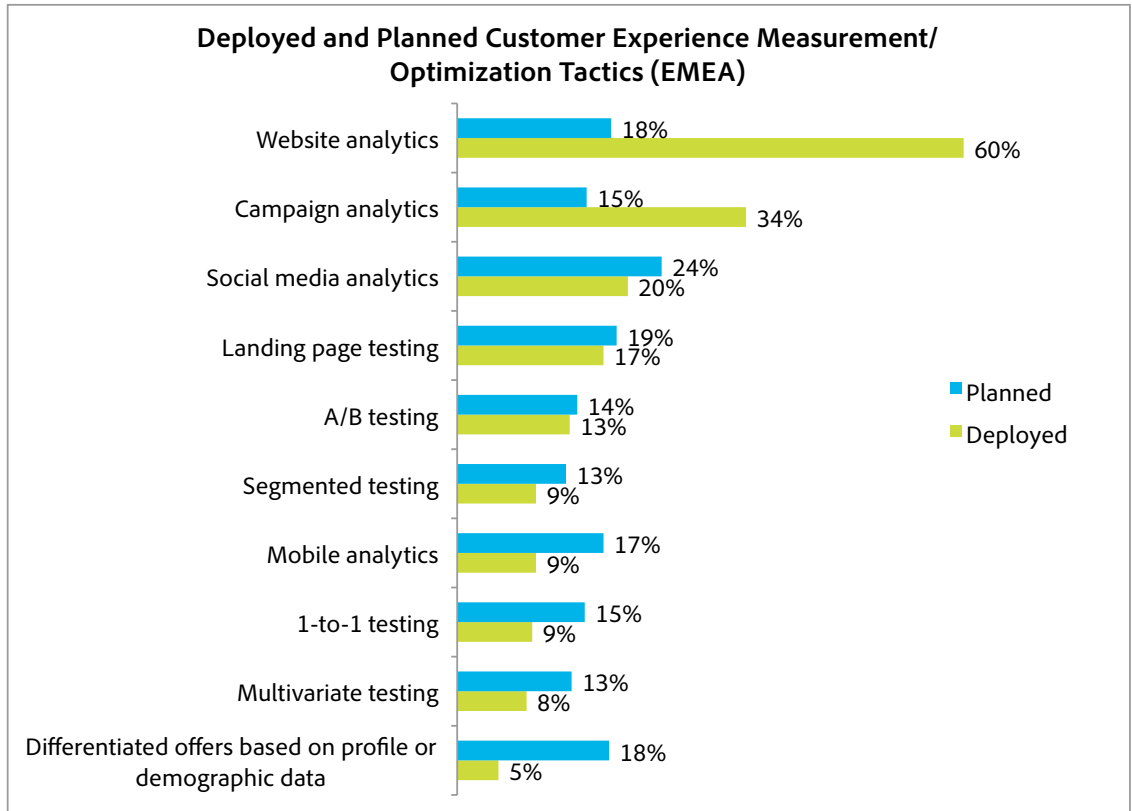


Digital advertising effectiveness

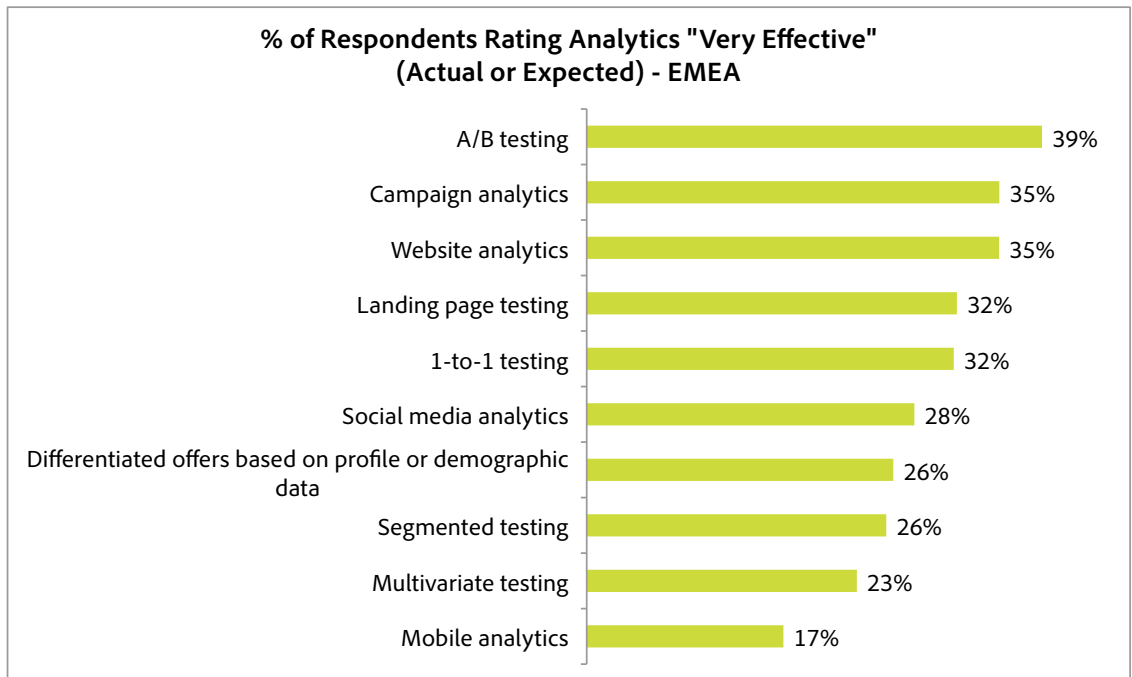


Analytics

Planned and deployed analytics features

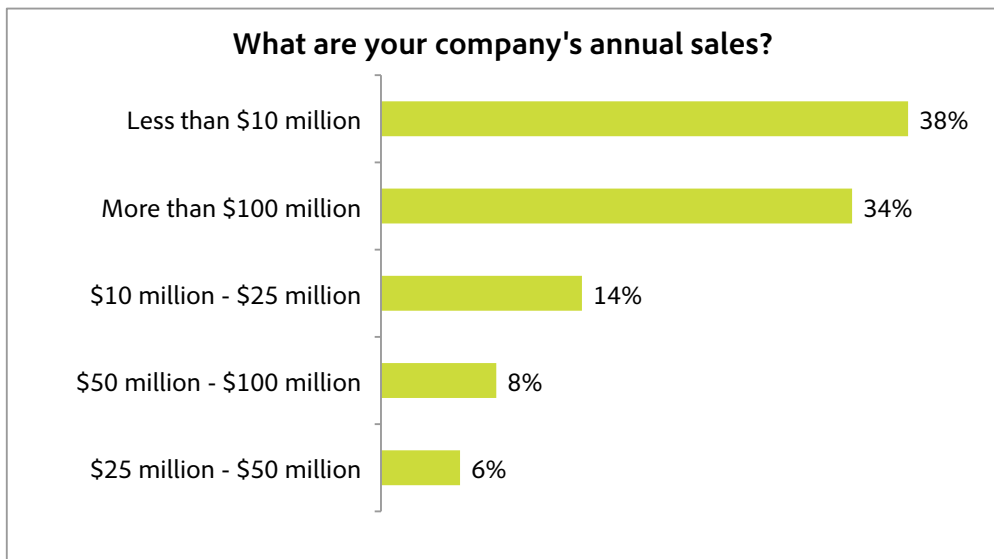
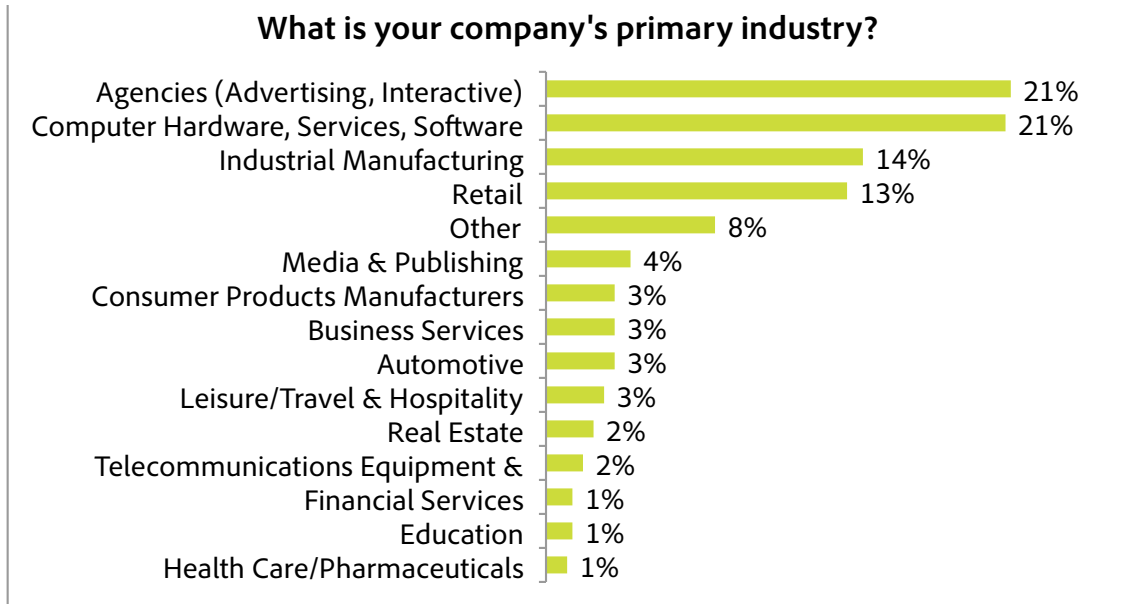


Analytics effectiveness

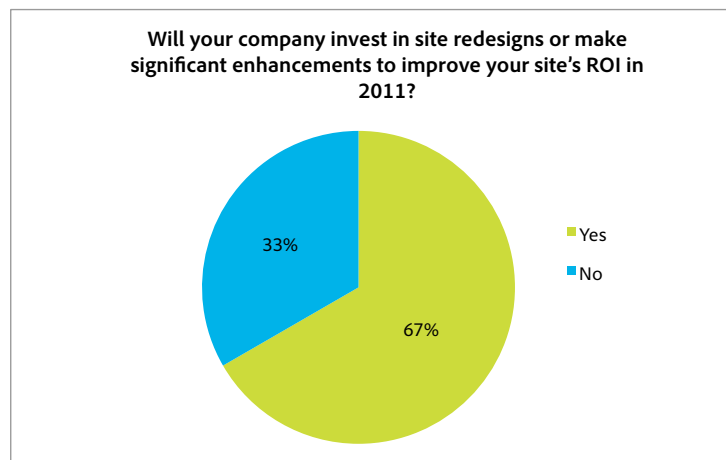


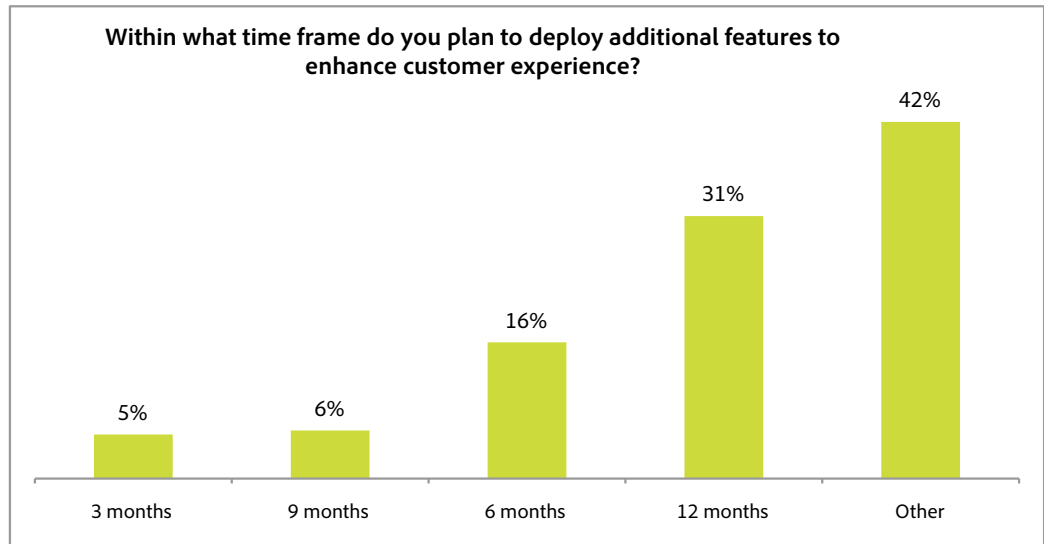
Appendix 3 – Japan Survey Results

Participants Profile



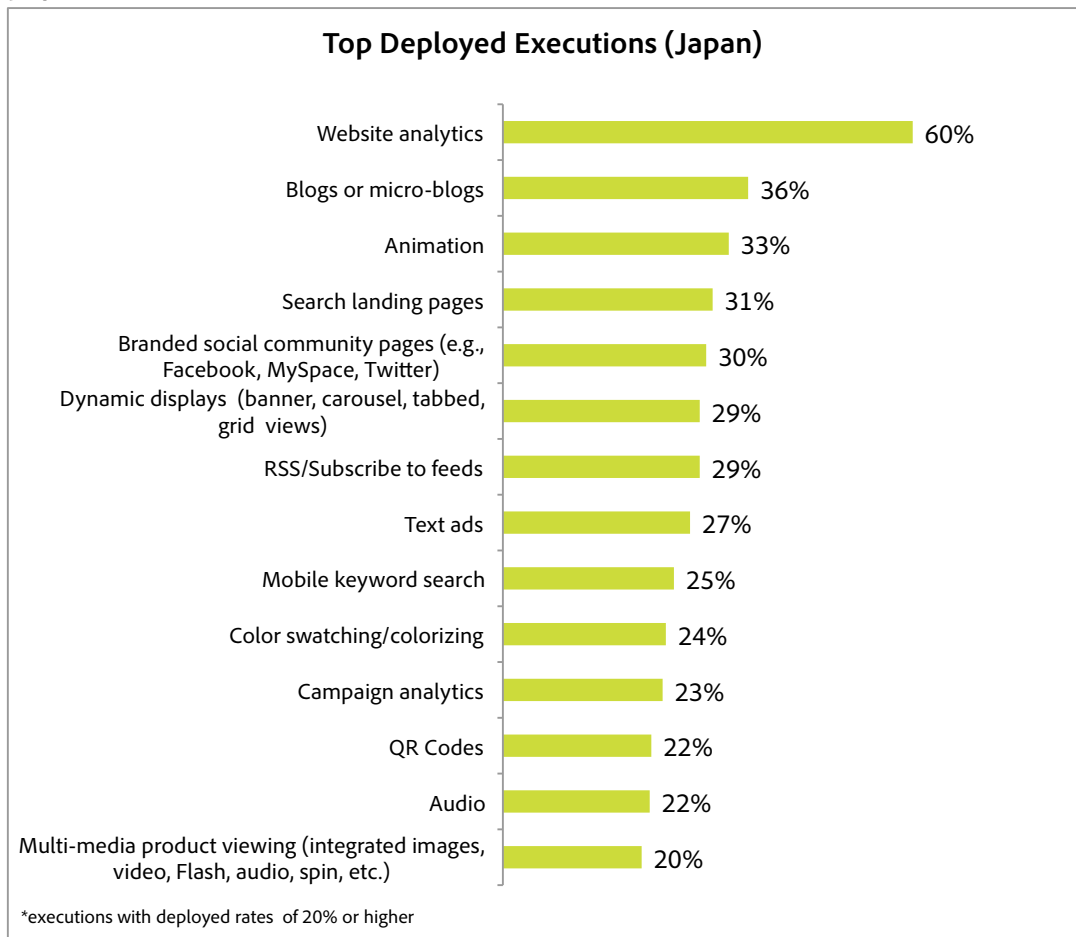
Investing in Online Enhancements





Results by Deployed, Planned and Very Effective Metrics

Deployed Executions



Other deployed executions

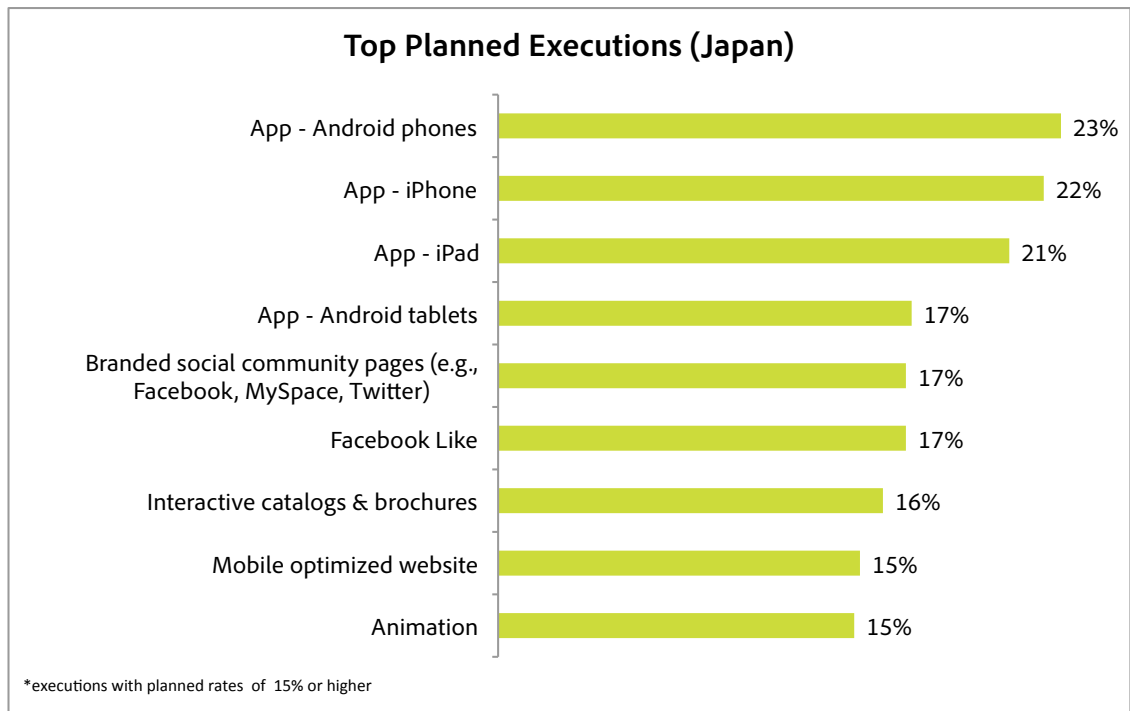
User comments and reviews	19%
Zoom	19%
Videos for merchandising, advertising and demonstration	19%

Other deployed executions	
Image ads	18%
Quick looks & rollover views	16%
Mobile product information	16%
Microsites/brand boutiques	15%
Mobile check order status	15%
A/B testing	15%
Mobile analytics	14%
Email Friend	14%
Landing page testing	14%
Commerce enablement - shop & buy on mobile device	14%
Lifestyle imagery (in room, on model)	14%
Alternative images	13%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	13%
Mobile optimized website	13%
Social sharing (post to social networking and bookmarking sites, e.g., Facebook, MySpace, etc.)	13%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	13%
Display ads	12%
Facebook Like	12%
App - iPhone	12%
Personalization by ZIP code/geo-targeted sites	11%
Retargeting/Remarketing	11%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	11%
Social media analytics	11%
User ratings & rankings	10%
Mobile catalogs & brochures	10%
Mobile Web ads	10%
Mobile reviews/ratings	10%
Mobile check inventory status - in-store or Web	9%
App - iPad	9%
Mobile zoom/pan	9%
Product comparisons	8%
Mobile social sharing	8%
Mobile rich media visualization	8%
Segmented testing	8%
Interactive catalogs & brochures	8%
Side by side comparisons	8%
Check delivery status on mobile device	7%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	7%

Other deployed executions	
Rich media ads	7%
Personalized stores (with My Account, profile, favorites)	7%
Mobile color swatching/colorizing	7%
Dynamic Optimization	7%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	7%
Predictive modeling	6%
App - other phones/tablets	6%
Multivariate testing	6%
Mobile gift/wish list registries	6%
Mobile app ads	6%
Mobile multi-media (zoom, spin, videos or animations)	6%
Personalization engine (behavioral targeting)	5%
Mobile GPS and map integration/store locator	5%
Podcasts or live video feed	5%
Differentiated offers based on profile or demographic data	5%
360-degree spin	5%
Mobile alternative images	5%
App - Android phones	4%
Visual filtering & advanced search on product features (size, color, price)	4%
Shop by outfit, room or collection	4%
Catalogs optimized for mobile	4%
Desktop widgets	4%
SMS/MMS	4%
Mobile videos - live streaming	4%
Mix and match	4%
Mobile price check - Web to store	4%
Wikis	4%
Address book integration for mobile	4%
SMS/MMS ads	4%
App - Android tablets	4%
3-D visualization	4%
Interactive design tools	4%
Live chat/instant messaging	4%
Visual product configurators (custom products)	4%
Mobile videos - progressive download	3%
Mobile check-in rewards	3%
Hosting own video portal (user-generated and company content)	3%
User-generated visual content (images, video, audio)	3%
1-to-1 testing	3%

Other deployed executions	
Mashups	3%
Virtual fitting room	3%
Mobile product comparisons	3%
User-created collections for sharing & purchase (e.g., outfits, furniture)	3%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	2%
Mobile click to call	2%
Mobile custom product design	2%
Visual monogramming & engraving tools	2%
User-designed merchandise available for purchase	2%
Co-shopping & browsing online with an expert or friends	2%
Collaborative custom product design (items, sets, outfits, etc.)	2%
Mobile shop by outfit, room or collection	1%
Mobile mix and match coordinates	1%
Mobile 360-degree spin	1%

Planned Executions



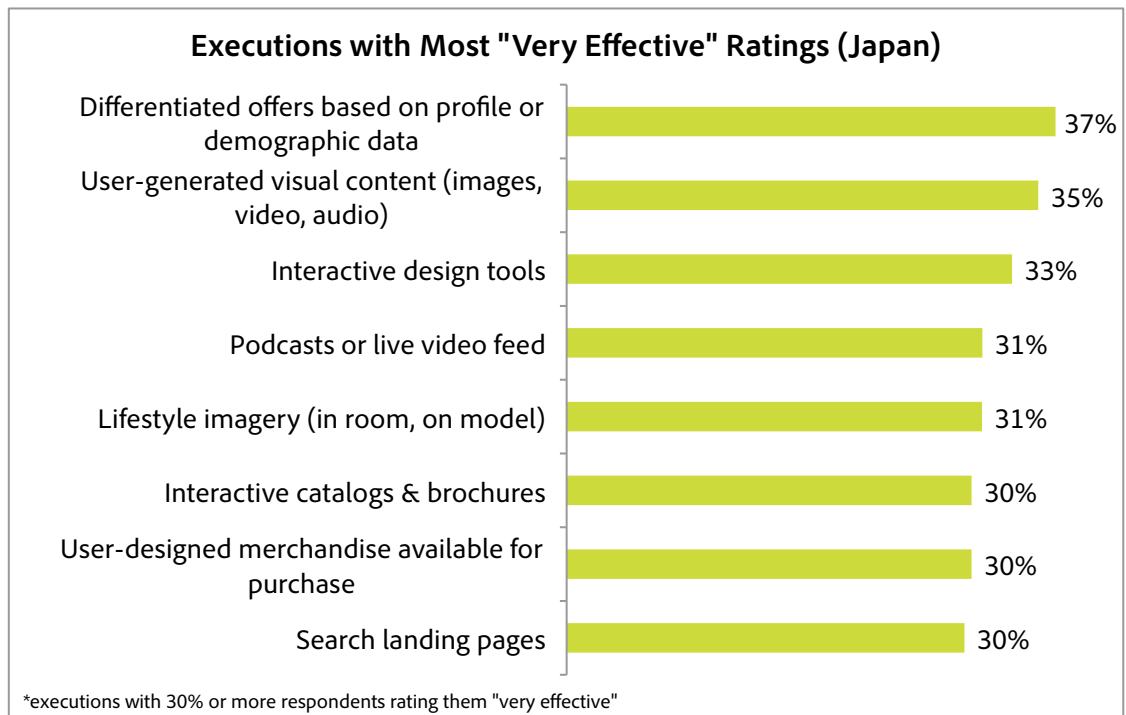
Other planned executions:	
Alternative images	14%
Social sharing (post to social networking and bookmarking sites, e.g., Facebook, MySpace, etc.)	14%
Multi-media product viewing (integrated images, video, Flash, audio, spin, etc.)	13%
Search landing pages	13%

Other planned executions:	
Videos for merchandising, advertising and demonstration	13%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	13%
Social media analytics	13%
Blogs or micro-blogs	12%
Predictive modeling	12%
3-D visualization	12%
User comments and reviews	12%
Zoom	12%
Product comparisons	12%
Lifestyle imagery (in room, on model)	11%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	11%
Personalization by ZIP code/geo-targeted sites	11%
App - other phones/tablets	11%
Personalization engine (behavioral targeting)	11%
360-degree spin	11%
Website analytics	11%
Interactive design tools	11%
Dynamic displays (banner, carousel, tabbed, grid views)	11%
User ratings & rankings	11%
Color swatching/colorizing	10%
Mobile analytics	10%
A/B testing	10%
Mobile catalogs & brochures	10%
Mobile zoom/pan	10%
Mobile social sharing	10%
Campaign analytics	10%
Wikis	10%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	10%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	9%
Mobile rich media visualization	9%
Image ads	9%
Email Friend	9%
Side by side comparisons	9%
Mobile GPS and map integration/store locator	9%
Visual filtering & advanced search on product features (size, color, price)	9%
Address book integration for mobile	9%
Microsites/brand boutiques	9%
Landing page testing	9%
Shop by outfit, room or collection	9%

Other planned executions:	
RSS/Subscribe to feeds	9%
Audio	9%
Quick looks & rollover views	9%
Check delivery status on mobile device	9%
Dynamic Optimization	9%
Multivariate testing	9%
Mobile multi-media (zoom, spin,videos or animations)	9%
QR Codes	8%
Display ads	8%
Mobile alternative images	8%
Catalogs optimized for mobile	8%
User-created collections for sharing & purchase (e.g., outfits, furniture)	8%
Co-shopping & browsing online with an expert or friends	8%
Podcasts or live video feed	8%
Mobile videos - live streaming	8%
Collaborative custom product design (items, sets, outfits, etc.)	8%
Mobile keyword search	8%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	8%
Differentiated offers based on profile or demographic data	8%
Mix and match	8%
Hosting own video portal (user-generated and company content)	8%
User-generated visual content (images, video, audio)	8%
User-designed merchandise available for purchase	8%
Mobile 360-degree spin	8%
Mobile check order status	8%
Retargeting/Remarketing	8%
Mobile app ads	8%
Mobile product information	7%
Mobile Web ads	7%
Mobile reviews/ratings	7%
Mobile check inventory status - in-store or Web	7%
Desktop widgets	7%
Mashups	7%
Segmented testing	7%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	7%
Rich media ads	7%
Personalized stores (with My Account, profile, favorites)	7%
Mobile price check - Web to store	7%
Mobile click to call	7%

Other planned executions:	
Mobile gift/wish list registries	7%
Live chat/instant messaging	7%
Mobile videos - progressive download	7%
Virtual fitting room	7%
Text ads	6%
Commerce enablement - shop & buy on mobile device	6%
Mobile product comparisons	6%
SMS/MMS ads	6%
Visual product configurators (custom products)	6%
Mobile check-in rewards	6%
1-to-1 testing	6%
Mobile color swatching/colorizing	6%
SMS/MMS	6%
Mobile shop by outfit, room or collection	6%
Mobile custom product design	5%
Mobile mix and match coordinates	5%
Visual monogramming & engraving tools	5%

Executions drawing the most 'very effective' ratings



Other executions garnering 'very effective' ratings:	
Shop by outfit, room or collection	29%
Mobile reviews/ratings	29%
User comments and reviews	28%
User ratings & rankings	28%
Mobile shop by outfit, room or collection	28%
Multi-media product viewing (integrated images, video, Flash, audio, spin, etc.)	27%
Personalization engine (behavioral targeting)	27%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy)	26%
Mobile product information	25%
Live chat/instant messaging	25%
Visual filtering & advanced search on product features (size, color, price)	24%
A/B testing	24%
Content distribution (publish video & assets to social portals, e.g., YouTube, Facebook Wall)	24%
Mobile custom product design	24%
Videos for merchandising, advertising and demonstration	24%
Mobile optimized website	23%
Alternative images	23%
Predictive modeling	23%
Interactive in-store tools (e.g., kiosks, signage, dressing room mirrors, etc.)	23%
Mix and match	23%
App - Android phones	23%
Virtual fitting room	23%
Website analytics	23%
App - iPhone	23%
Multivariate testing	22%
Mobile product comparisons	22%
Commerce enablement - shop & buy on mobile device	22%
Mobile Catalogs & brochures	22%
Mobile check inventory status - in-store or Web	22%
App - Android tablets	21%
Mobile analytics	21%
Zoom	21%
Advertising on social networking sites (e.g. Facebook, LinkedIn)	21%
Landing page testing	21%
Personalization by ZIP code/geo-targeted sites	20%
App - iPad	20%
Product comparisons	20%
Social sharing (post to social networking and bookmarking sites, e.g., Facebook, MySpace, etc.)	20%

Other executions garnering 'very effective' ratings:	
Mobile gift/wish list registries	20%
URL & Web widget viral sharing (embed on other sites, blogs, etc.)	20%
Mobile keyword search	20%
Rich media ads	20%
Mobile rich media visualization	19%
Catalogs optimized for mobile	19%
Visual product configurators (custom products)	19%
Retargeting/Remarketing	19%
Hosting own video portal (user-generated and company content)	19%
Personalized stores (with My Account, profile, favorites)	19%
Campaign analytics	18%
Mobile multi-media (zoom, spin, videos or animations)	18%
Social media analytics	18%
Visual monogramming & engraving tools	18%
360-degree spin	18%
Blogs or micro-blogs	17%
Mobile social sharing	17%
3-D visualization	17%
Animation	17%
User-created collections for sharing & purchase (e.g., outfits, furniture)	17%
Wikis	17%
Side by side comparisons	16%
Mobile Web ads	16%
Branded social community pages (e.g., Facebook, MySpace, Twitter)	16%
Display ads	16%
App - other phones/tablets	16%
Mobile alternative images	16%
Microsites/brand boutiques	15%
Check order status on mobile device	15%
Mobile color swatching/colorizing	15%
Co-shopping & browsing online with an expert or friends	14%
Mashups	14%
Mobile 360-degree spin	14%
Mobile videos - progressive download	14%
Mobile GPS and map integration/store locator	14%
Quick looks & rollover views	14%
Email Friend	14%
Text ads	13%
QR Codes	13%

Other executions garnering 'very effective' ratings:	
Audio	13%
Mobile zoom/pan	13%
Facebook Like	13%
Mobile app ads	13%
Segmented testing	13%
Dynamic displays (banner, carousel, tabbed, grid views)	12%
Image ads	12%
1-to-1 testing	12%
Mobile videos - live streaming	11%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web	11%
Check delivery status on mobile device	11%
Color swatching/colorizing	10%
Address book integration for mobile	10%
Collaborative custom product design (items, sets, outfits, etc.)	10%
Dynamic Optimization	9%
Desktop widgets	9%
RSS/Subscribe to feeds	7%
Mobile check-in rewards	7%
SMS/MMS ads	6%
Mobile mix and match coordinates	4%
Mobile click to call	4%
Mobile price check - Web to store	3%
SMS/MMS	3%

Year-over-Year Trends

This table shows some of the executions having the largest year-to-year growth for each of the three metrics among businesses headquartered in Japan.

Deployed Tactics
Animation, +137%
Zoom, +126%
Audio, +122%
URL & Web widget viral sharing (embed on other sites, blogs, etc.), +118%
Quick looks & rollover views, +118%
RSS/Subscribe to feeds, +116%
User comments and reviews, +88%
Alternative images, +85%
Podcasts or live video feed, +72%
Lifestyle imagery (in room, on model), +64%

Deployed Tactics

Blogs or micro-blogs, +60%
Videos for merchandising, advertising and demonstration, +56%
360-degree spin, +37%
Product comparisons, +21%
Side by side comparisons, +13%
Predictive modeling, +13%
User ratings & rankings, +9%
Wikis, +4%

Planned Tactics

Commerce enablement - shop & buy on mobile device, +202%
Mobile check inventory status - in-store or Web, +47%
Search landing pages, +21%

"Very Effective" Tactics

Search landing pages, +103%
Blogs or micro-blogs, +101%
Lifestyle imagery (in room, on model), +101%
User-created collections for sharing & purchase (e.g., outfits, furniture), +97%
Dynamic displays (banner, carousel, tabbed, grid views), +95%
Branded social community pages (e.g., Facebook, MySpace, Twitter), +86%
Zoom, +86%
Microsites/brand boutiques, +73%
Mix and match, +64%
360-degree spin, +60%
Videos for merchandising, advertising and demonstration, +59%
Visual filtering & advanced search on product features (size, color, price), +48%
User ratings & rankings, +40%
Mobile advertising, promotions, bar-coded coupons - drive to store or Web, +40%
Mobile price check - Web to store, +39%
Check delivery status on mobile device, +38%
Interactive catalogs & brochures, +34%
Personalization engine (behavioral targeting), +34%
User comments and reviews, +33%
Visual product configurators (custom products), +33%
Co-shopping & browsing online with an expert or friends, +32%
Commerce enablement - shop & buy on mobile device, +31%
Wikis, +30%
Address book integration for mobile, +30%
Predictive modeling, +29%

"Very Effective" Tactics

Mobile GPS and map integration/store locator, +28%

Collaborative custom product design (items, sets, outfits, etc.), +27%

Personalized stores (with My Account, profile, favorites), +25%

Visual monogramming & engraving tools, +22%

3-D visualization, +19%

Mobile check inventory status - in-store or Web, +16%

Side by side comparisons, +12%

Personalization by ZIP code/geo-targeted sites, +8%

Product tours (combinations guided spin, zoom imagery, videos or animations with copy), +6%

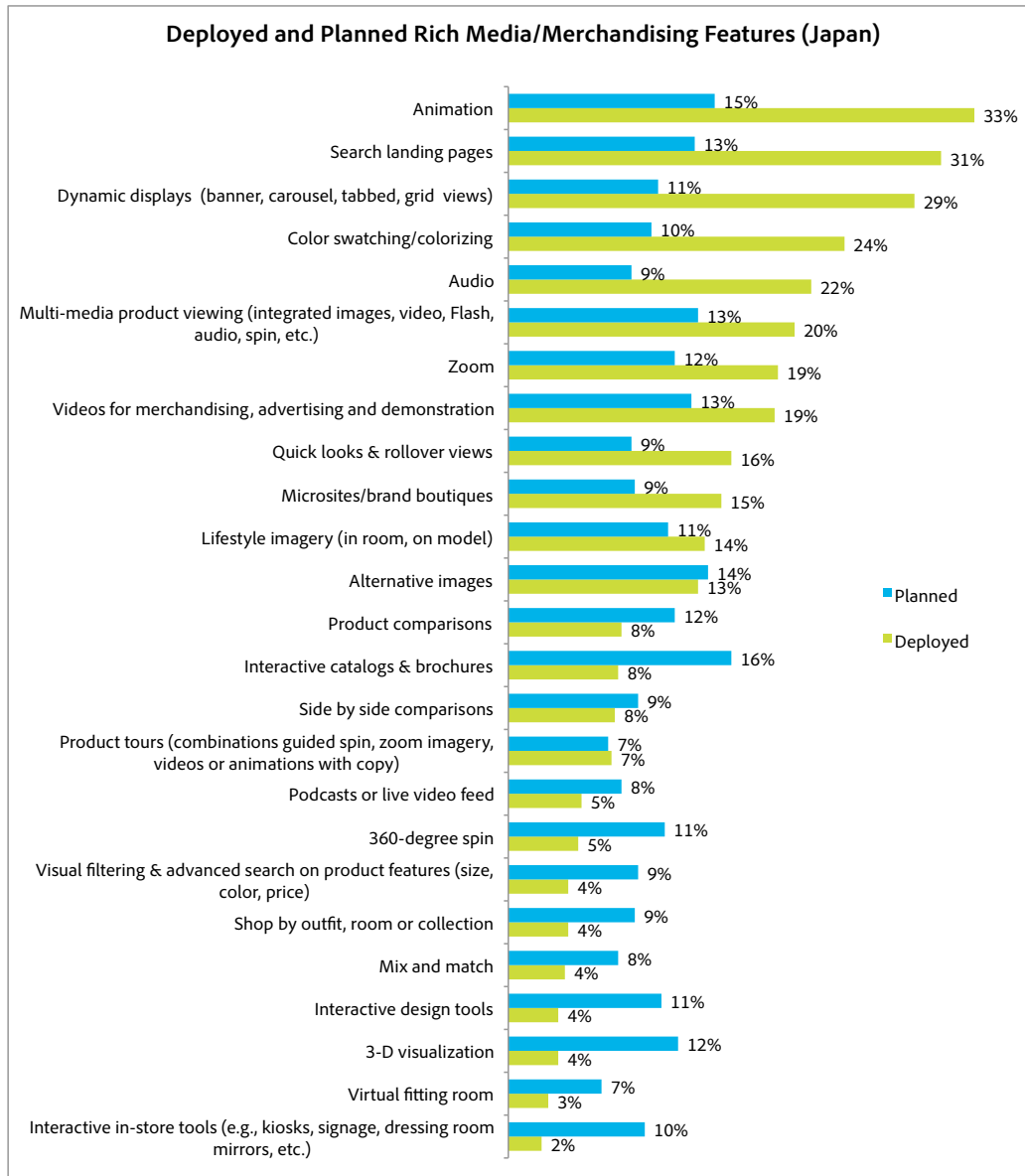
Animation, +6%

Results by Category

Below are the Japan results for each tactical category across planned, deployed and effectiveness.

Rich Media/Merchandising

Planned and deployed rich merchandising features



The following rich media features saw the highest year-on-year growth in deployment and planned deployments for Japan:

Deployed
Animation, +137%
Zoom, +126%
Audio, +122%
Quick looks & rollover views, +118%
Alternative images, +85%
Podcasts or live video feed, +72%

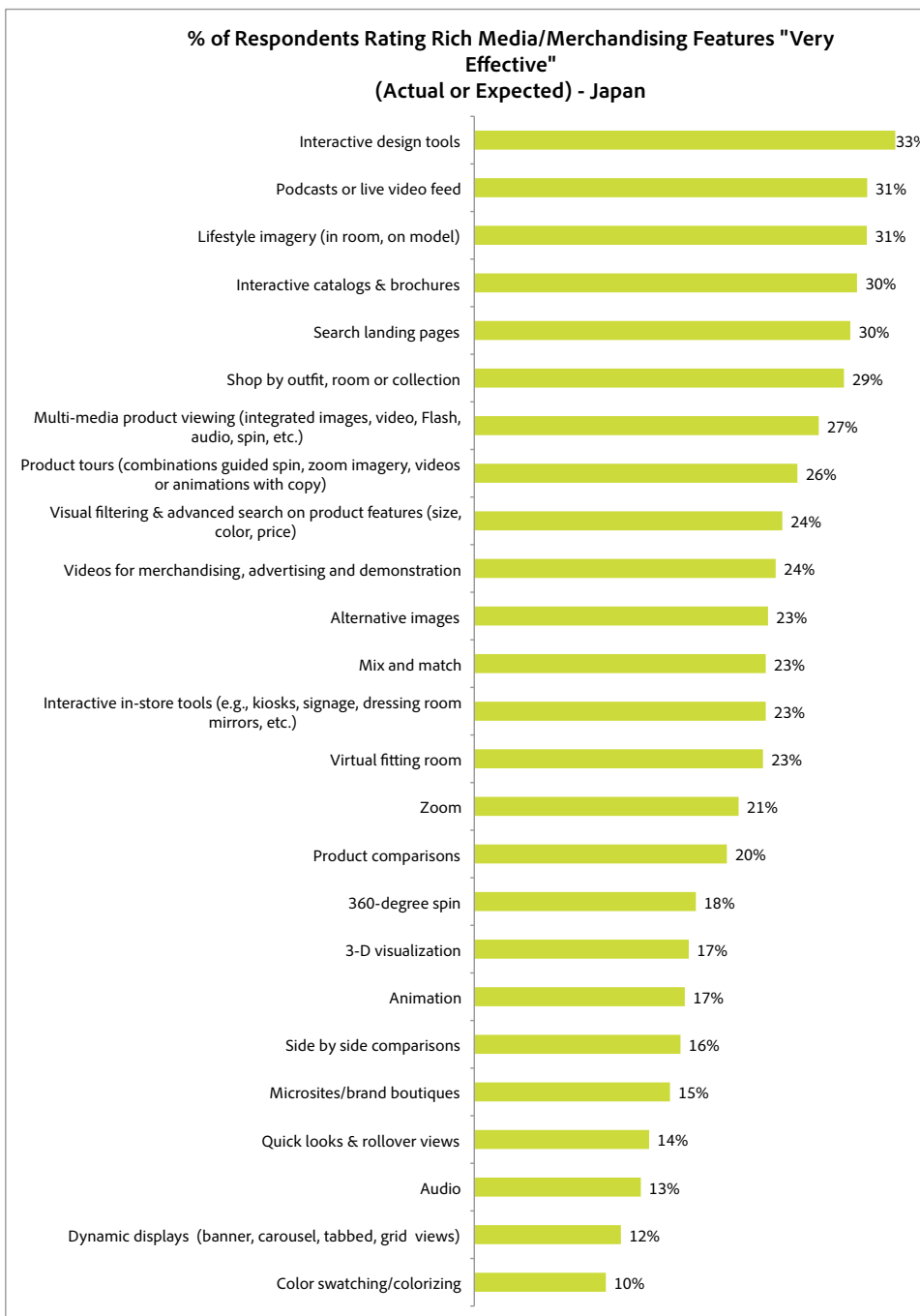
Deployed

- Lifestyle imagery (in room, on model), +64%
- Videos for merchandising, advertising and demonstration, +56%
- 360-degree spin, +37%
- Product comparisons, +21%
- Side by side comparisons, +13%

Planned

- Search landing pages, +21%

Rich merchandising features effectiveness

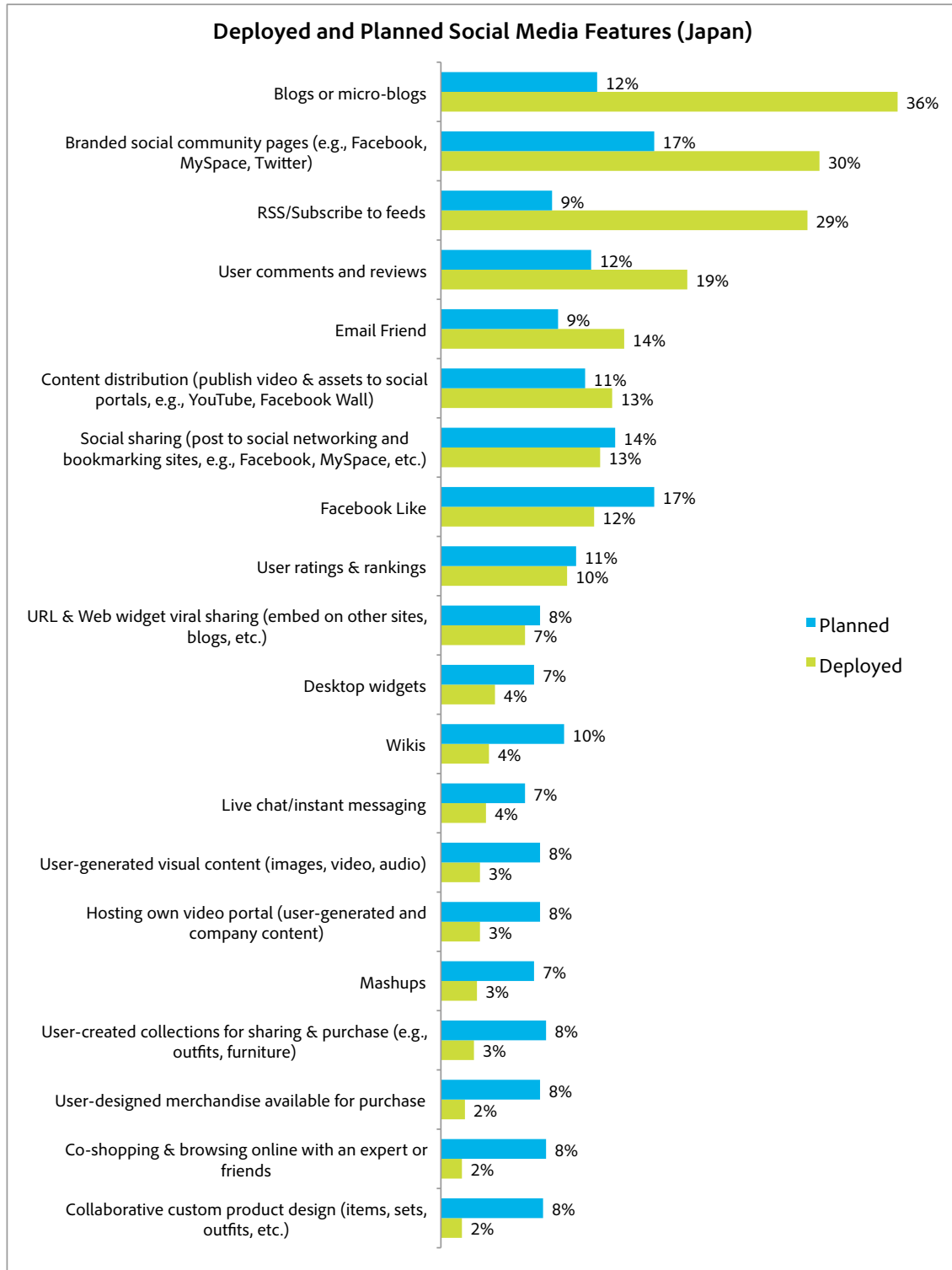


Below are rich media executions showing the largest change in the percentage of people rating it 'very effective':

Search landing pages, +103%
Lifestyle imagery (in room, on model), +101%
Dynamic displays (banner, carousel, tabbed, grid views), +95%
Zoom, +86%
Microsites/brand boutiques, +73%
Mix and match, +64%
360-degree spin, +60%
Videos for merchandising, advertising and demonstration, +59%
Visual filtering & advanced search on product features (size, color, price), +48%
Interactive catalogs & brochures, +34%
3-D visualization, +19%
Side by side comparisons, +12%
Product tours (combinations guided spin, zoom imagery, videos or animations with copy), +6%
Animation, +6%

Social Media-Based Features

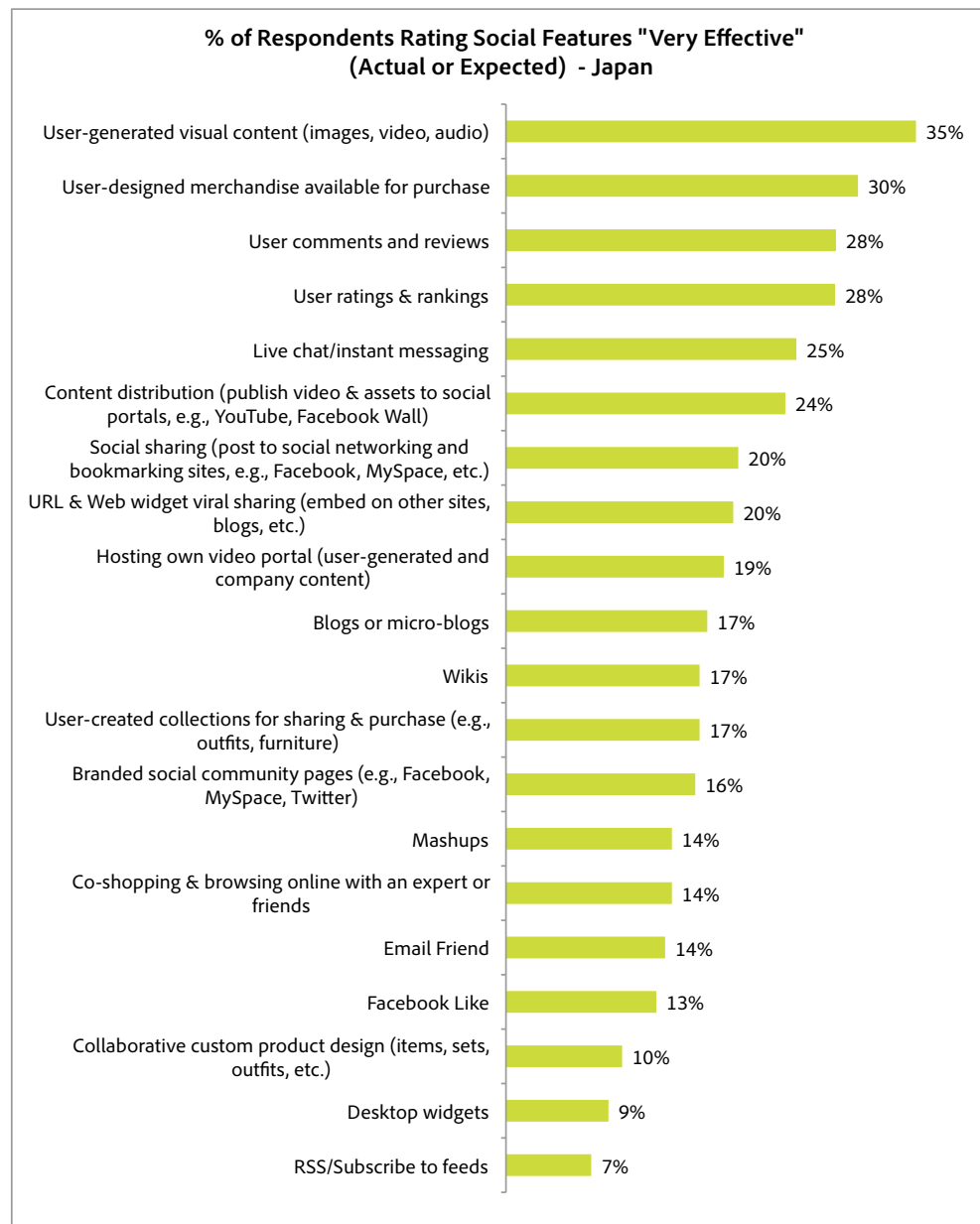
Planned and deployed social media-based features



The following social media features saw the highest year-on-year growth in deployment and planned deployments:

Deployed
URL & Web widget viral sharing (embed on other sites, blogs, etc.), +118%
RSS/Subscribe to feeds, +116%
User comments and reviews, +88%
Blogs or micro-blogs, +60%
User ratings & rankings, +9%
Wikis, +4%
Planned
None

Social-media-based features effectiveness

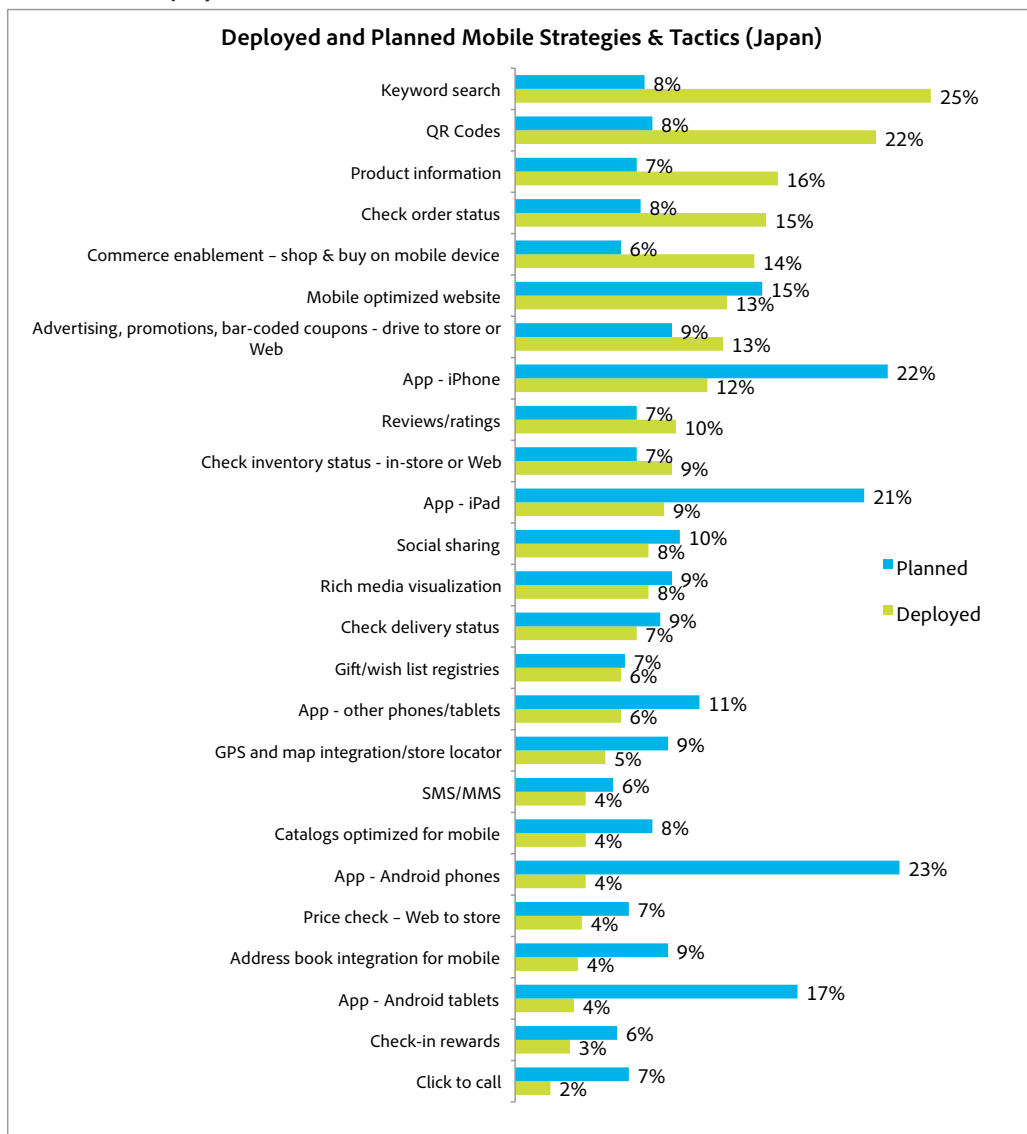


Below are the social executions showing the largest change in the percentage of people rating it "very effective":

Blogs or micro-blogs, +101%
User-created collections for sharing & purchase (e.g., outfits, furniture), +97%
Branded social community pages (e.g., Facebook, MySpace, Twitter), +86
User ratings & rankings, +40%
User comments and reviews, +33%
Co-shopping & browsing online with an expert or friends, +32%
Wikis, +30%
Collaborative custom product design (items, sets, outfits, etc.), +27%

Mobile Features (excluding visualization features)

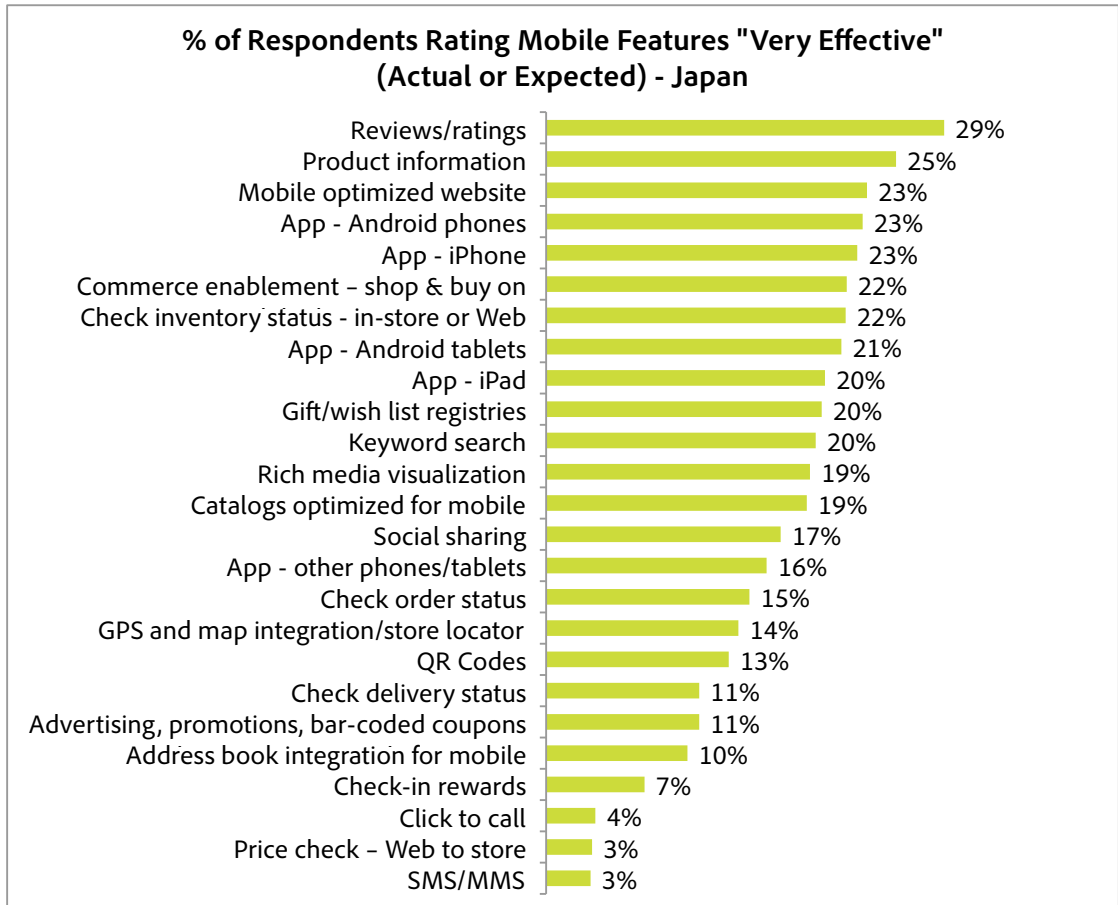
Planned and deployed mobile features



The following mobile features saw the highest year-on-year growth in planned deployments:

Planned
Commerce enablement - shop & buy on mobile device, +202%
Check inventory status - in-store or Web, +47%

Mobile features effectiveness

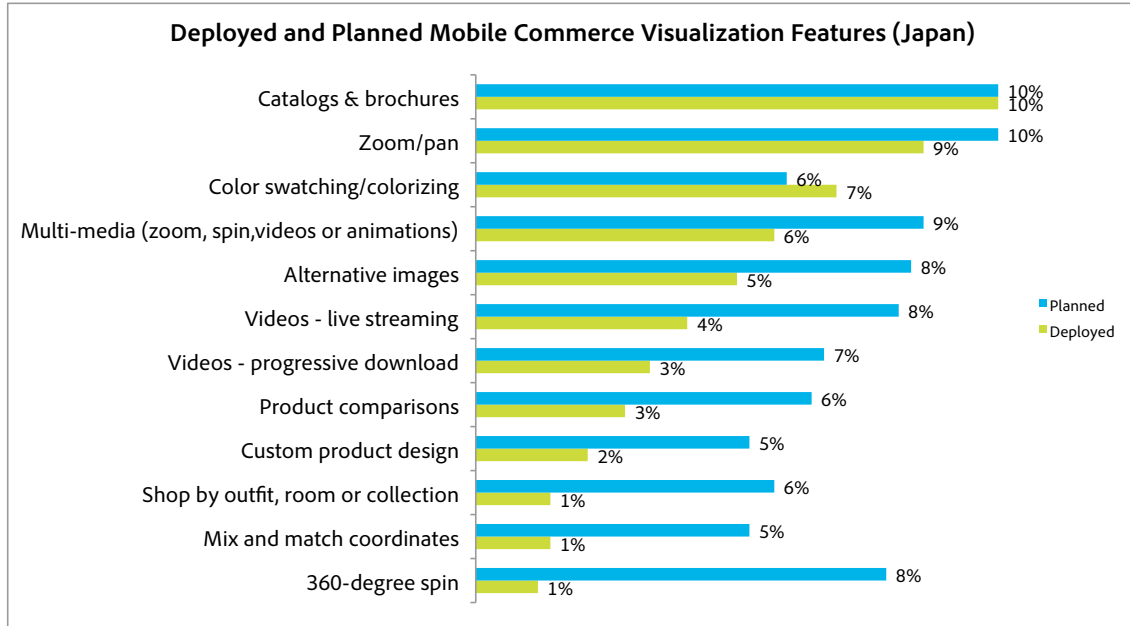


Below are the mobile executions showing the largest change in the percentage of people rating it "very effective":

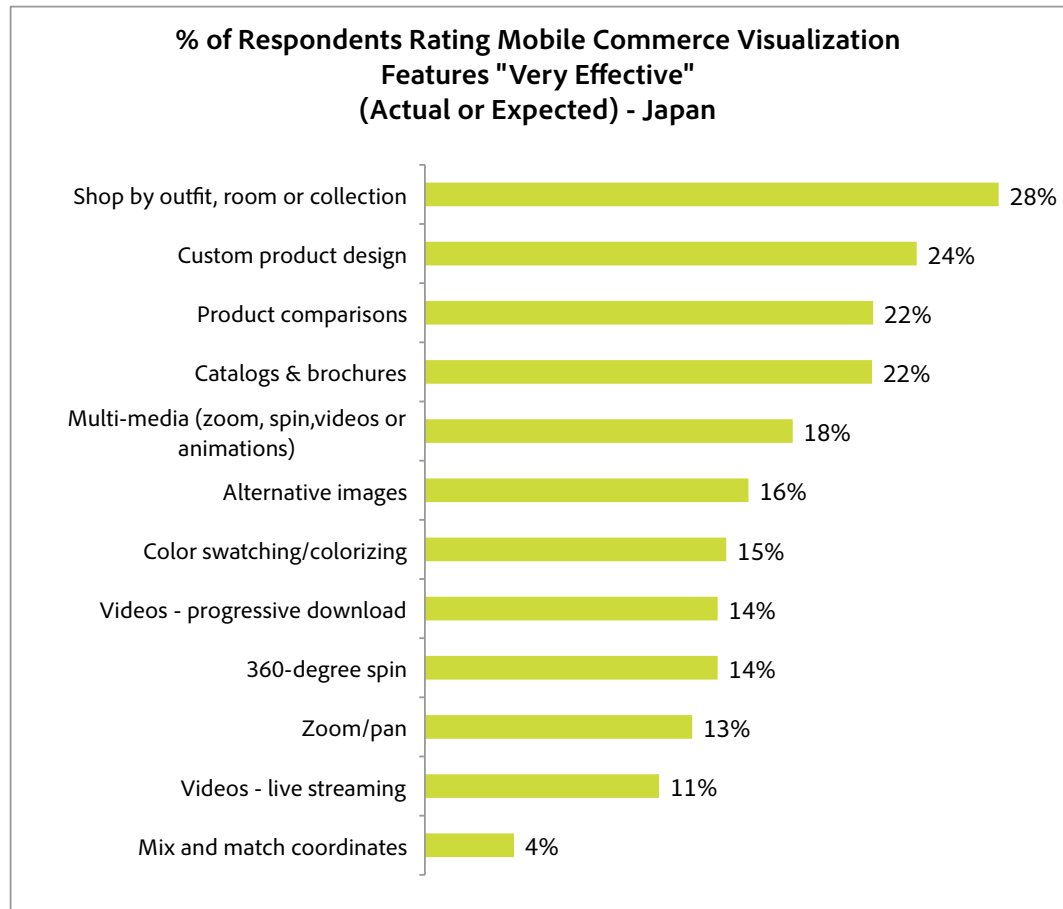
Advertising, promotions, bar-coded coupons - drive to store or Web, +40%
Price check - Web to store, +39%
Check delivery status, +38%
Commerce enablement - shop & buy on mobile device, +31%
Address book integration for mobile, +30%
GPS and map integration/store locator, +28%
Check inventory status - in-store or Web, +16%

Mobile Commerce Visualization Features

Planned and deployed mobile commerce visualization features

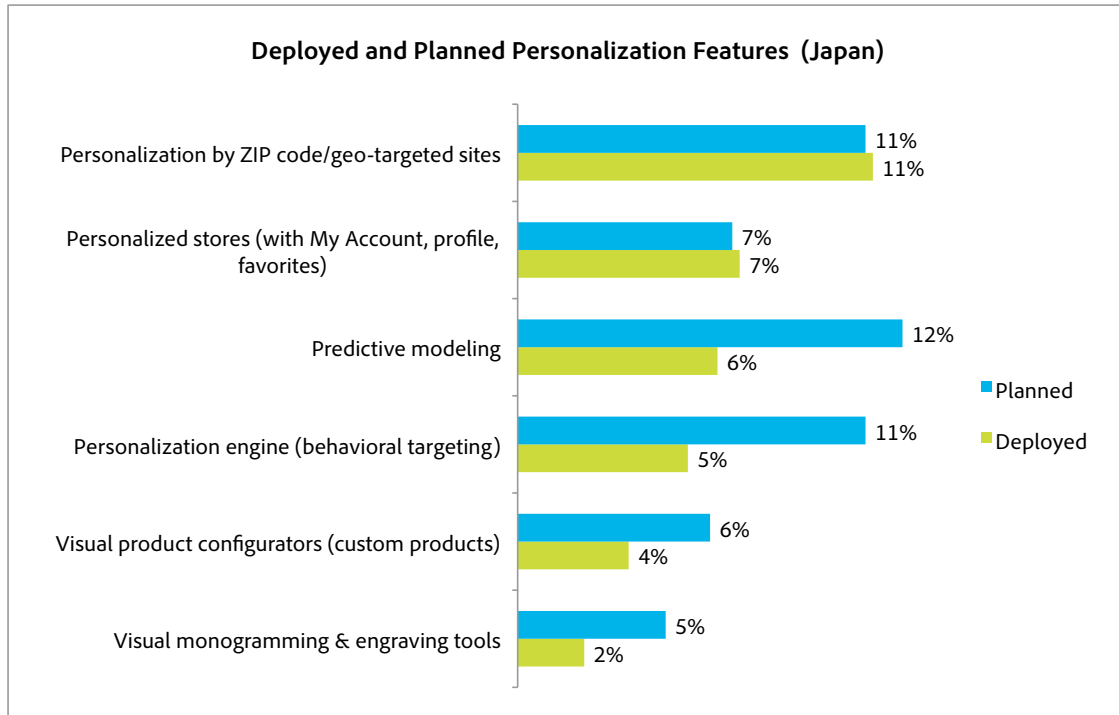


Mobile commerce visualization features effectiveness

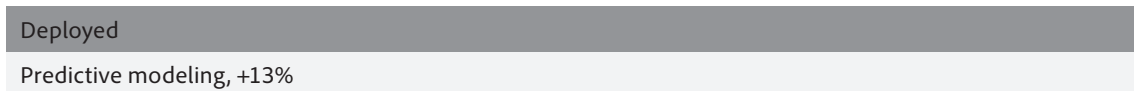


Personalization Features

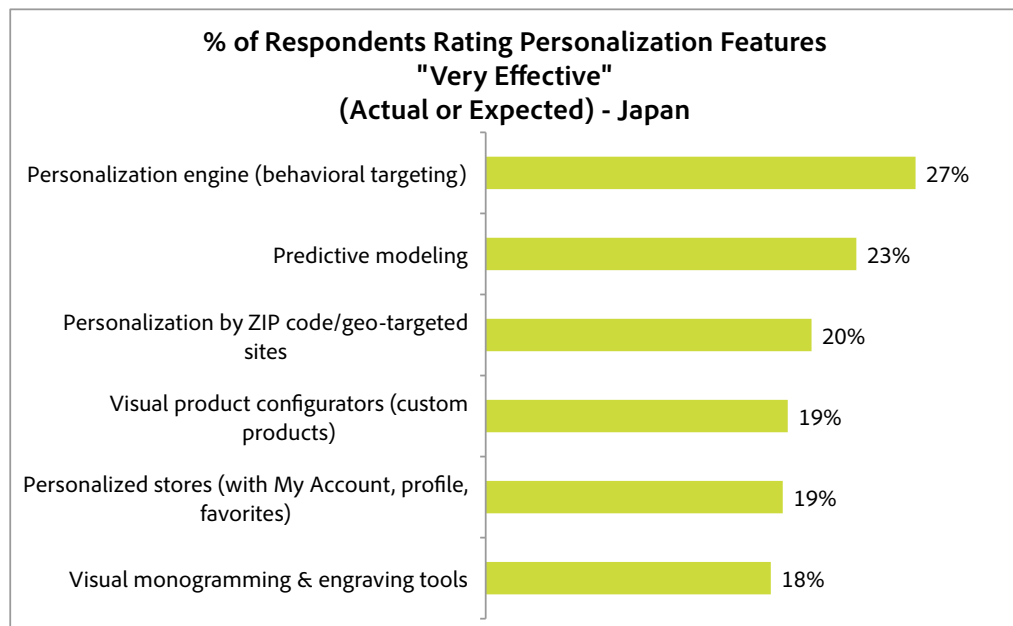
Planned and deployed personalization features



The following personalization feature saw the highest year-on-year growth in deployment:



Personalization features effectiveness

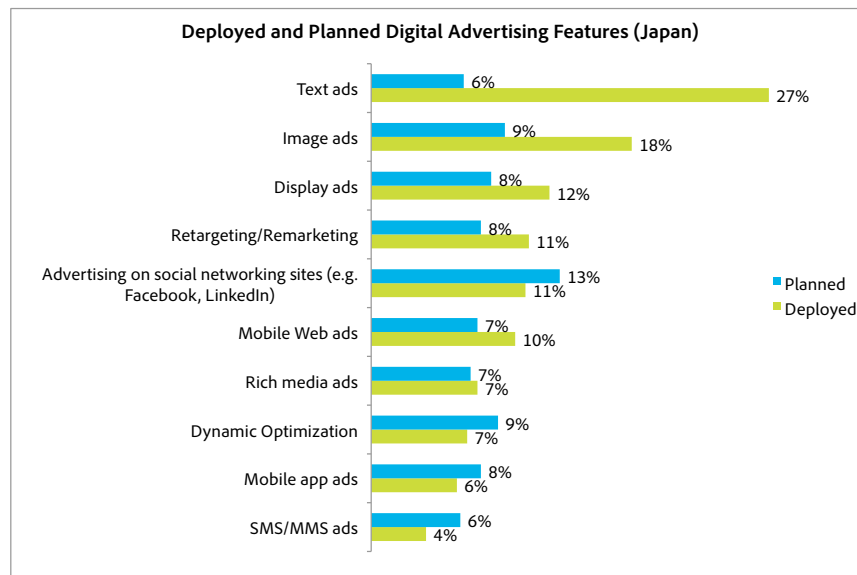


Below are the personalization tactics showing the largest change in the percentage of people rating it "very effective":

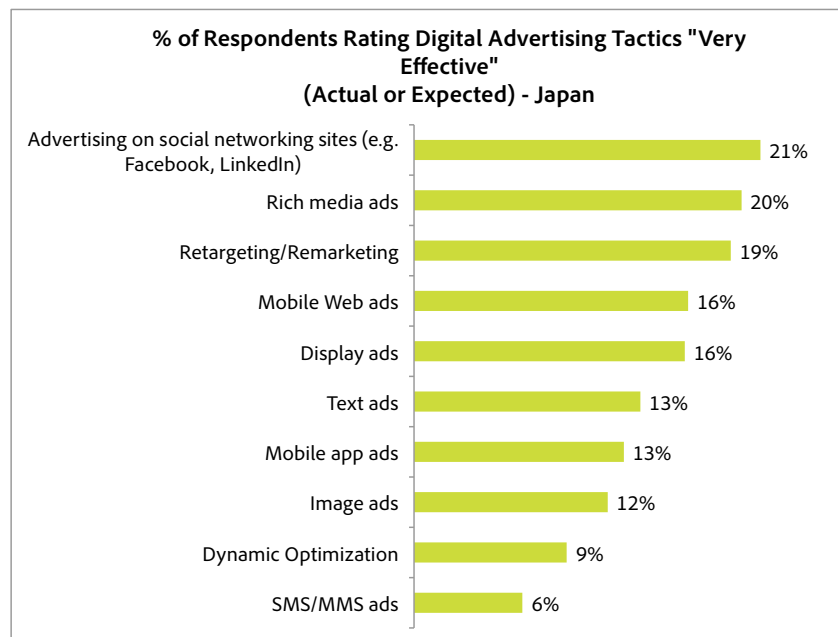
Personalization engine (behavioral targeting), +34%
Visual product configurators (custom products), +33%
Predictive modeling, +29%
Personalized stores (with My Account, profile, favorites), +25%
Visual monogramming & engraving tools, +22%
Personalization by ZIP code/geo-targeted sites, +8%

Digital Advertising Executions

Planned and deployed digital advertising executions and strategies

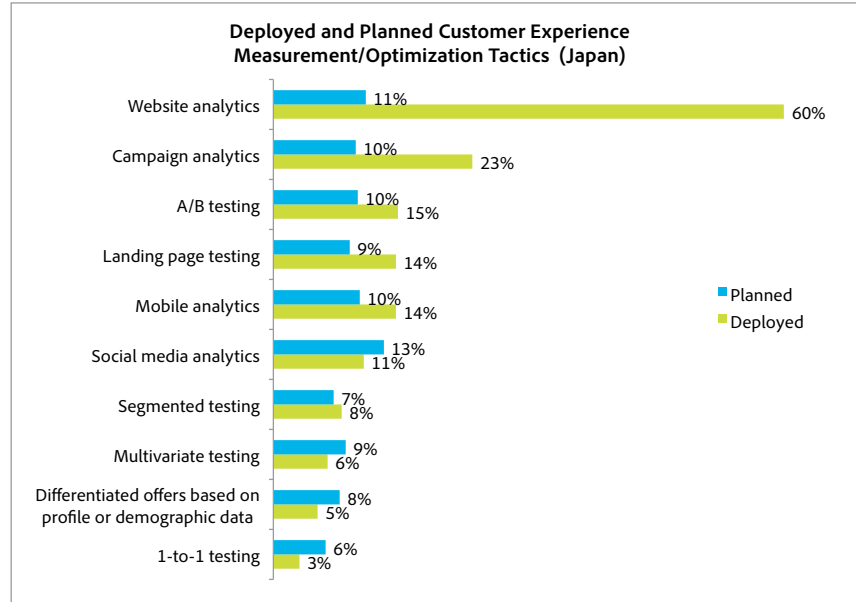


Digital advertising effectiveness

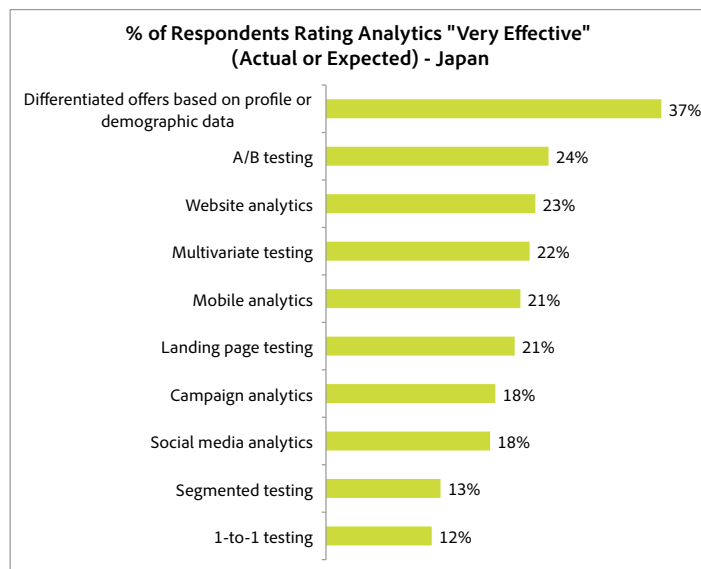


Analytics

Planned and deployed analytics features



Analytics effectiveness



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1.877.722.7088



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