The State of Multi-Channel Retail Marketing

A Paradigm Shift for Reaching New Customers

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Current multi-channel marketing capabilities and systems are disparate and siloed, leading to inconsistent branding and disjointed marketing offers across retail channels. Fifty-eight percent (58%) of respondents to the survey that provided data for Aberdeen's November 2010 *The Roadmap from Multi-Channel to Cross-Channel Retailing* benchmark report indicated that marketing ROI is critical to their cross-channel strategy. However, only 20% of respondents are able to quantify the impact of multi-channel marketing on the organization's business performance. This data point shows the tremendous gap that exists in multi-channel marketing operations and processes for 80% of retailers. As retailers are unable to integrate their marketing channels, it becomes nearly impossible to achieve the awareness, relevance, and revenue goals of their marketing campaigns.

Between January and May 2011, Aberdeen investigated the state of multi-channel marketing programs at 148 retail organizations. This Analyst Insight will examine how retailers align the brand image across channels while delivering personalized and relevant promotions to their customers.

Customer-Brand Interaction is at the Heart of Marketing Pressures

The pressures upon multi-channel marketers have shifted dramatically in the last year. In May 2010, according to Aberdeen's *Restocking the Marketer's Toolbox in the Digital Consumer Age* report, the top pressure facing retail marketers was the inability to measure the effectiveness of their marketing campaigns. This pressure has fallen to second place, as Figure 1 demonstrates - though it still remains a concern.

Marketing effectiveness has not become less important over time. Rather, a shift in customer behaviors and preferences has left retail CMOs scrambling to catch up. This year, 43% of survey respondents felt that a dramatic shift in the way consumers want to be marketed to was the top external business pressure affecting their marketing strategy (Figure 1). Consumers want more from retailers; they are looking for a brand relationship, not a transaction based environment. As channels of interaction and digital commerce evolve further, retailers need to know what information customers want to receive, and how they want to receive it - in the form of promotions, special offers, product information and updates, or even non-sales touches. Shifting customer preferences are driving the digital revolution in retail marketing, and will be a prominent theme in Aberdeen's upcoming Retail Summit in New York, NY on June 21 and 22.
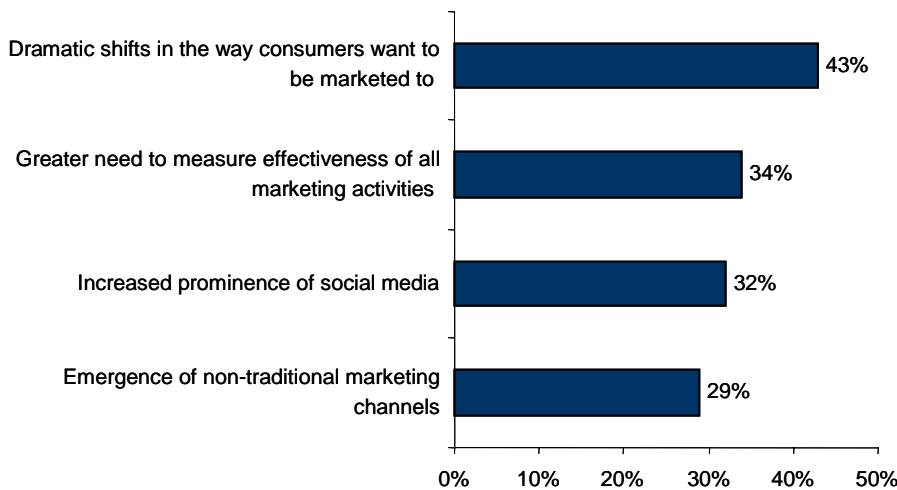
Analyst Insight

Aberdeen's Insights provide the analyst perspective of the research as drawn from an aggregated view of the research surveys, interviews, and data analysis

Multi-Channel Marketing Defined

Aberdeen defines multi-channel marketing as the use of all available channels for an integrated marketing campaign, utilizing consistent branding across all channels. (See the May 2010 *Restocking the Marketer's Toolbox in the Digital Consumer Age* report).

Marketers are anxious to track campaign effectiveness in the context of changing customer preferences. They need to learn what works, and what doesn't. According to Aberdeen's November 2010, _Multi-Channel to Cross-Channel Roadmap_ report, 71% of retailers have little to no integration of channel processes, and 81% of retailers have not integrated technology across channels. Without a consolidated channel marketing plan, the CMOs office cannot measure the impact of their cross-channel marketing campaigns.

Figure 1: Top Marketing Pressures

Percentage of Respondents, n=148

Source: Aberdeen Group, May 2011

The final two pressures facing retail marketing executives are interrelated: the increased prominence of social media (32%) and the emergence of non-traditional marketing channels (29%). As consumers turn to social channels for product information, recommendations, and brand-related feedback, marketers are also using this medium to react and relate to their customers. Channel outreach through mobile devices is rounding out the transitioning landscape of retail marketing, and retailers are adapting their marketing programs to include delivery through these new channels. Retailers must ensure a thought-out strategy to combat this pressure, rather than just a "me-too" mentality. Consumers are driving these new channels, and retailers must answer the call.

Setting the Stage for the Best-in-Class

Aberdeen used three key performance criteria to distinguish the Best-in-Class (top 20%) from all other organizations: current customer satisfaction, year-over-year change increase in customer retention rate, and year-over-year change increase in customer response rate. Table 1 shows the performance breakdown of Best-in-Class versus all other organizations.

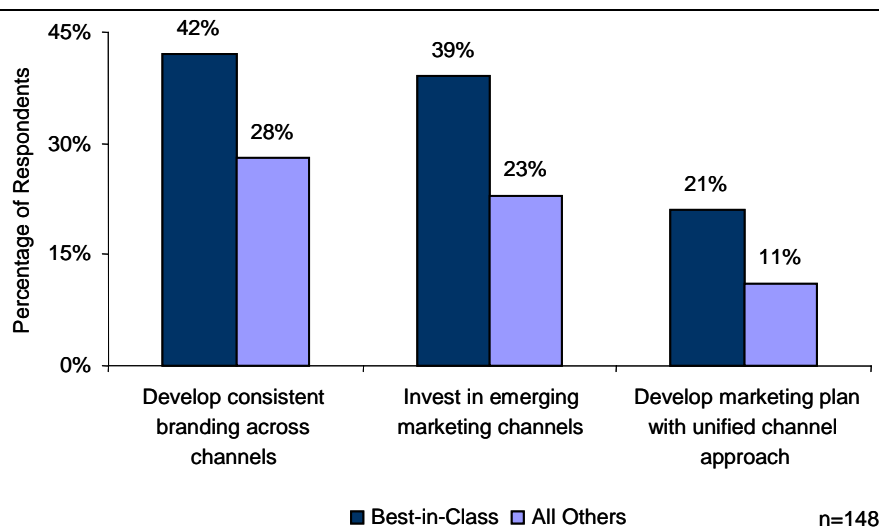"It is critical to understand the impact of each touch-point, and its effectiveness, to enable marketing to deploy limited promotional dollars in the most effective manner."

~ CIO, Tier 1 Pharmaceutical Retailer, Europe

Table 1: Defining the Best-in-Class

Definition of Maturity Class	Mean Class Performance
Best-in-Class: **Top 20%** of aggregate performance scorers	▪ Current Customer Satisfaction (CSAT): 89% ▪ Year-over-year increase in customer retention rate: 19% ▪ Year-over-year increase in customer response rate: 16%
All Others: **Remaining 80%** of aggregate performance scorers	▪ Current Customer Satisfaction (CSAT): 79% ▪ Year-over-year increase in customer retention rate: 2% ▪ Year-over-year increase in customer response rate: 2%

Source: Aberdeen Group, May 2011

A Best-in-Class Approach to Multi-Channel Marketing

As Figure 2 shows, Best-in-Class retailers have identified three key strategic actions in response to the pressures mentioned earlier. First, Best-in-Class retailers are one and a half times more likely to develop consistent branding across all marketing channels so as to establish a unified brand image (42%). As consumers turn to different channels for media consumption, marketing organizations must have consistent branding for all consumer-facing communications. Additionally, consistent promotions and pricing need to be delivered across channels to ensure brand compliance. According to the November 2010 report, _Multi-Channel to Cross-Channel Roadmap_, a mere 32% of respondents could execute a unified promotion plan for all marketing channels. Best-in-Class organizations take this challenge head on by integrating their channel marketing strategy.

Figure 2: Best-in-Class Strategic Actions

Source: Aberdeen Group, May 2011

"Customers that shop in multiple channels are five times more valuable to us than a single channel. Therefore if we can build consistency across all channels, customers will become more loyal to the brand."

~ CIO, Tier 2 Fashion Retailer, North America

Thirty-nine percent (39%) of Best-in-Class organizations, compared to 23% of all others, plan to invest in emerging marketing channels. The Best-in-Class are responding directly to the rise of social media and non-traditional marketing channels. According to the 2011 *Aberdeen Business Review*, on average, retail marketing budgets are increasing by 7% compared to 2010; Best-in-Class retailers are investing in emerging channels to align their brand with their customers. Data from the May 2010 *Restocking the Marketer's Toolbox in the Digital Consumer Age* report indicates that mobile marketing accounted for approximately 5% of survey respondents' overall marketing budget across all maturity classes. This year, however, the Best-in-Class proved themselves true visionaries of new channel adoption by allocating 10% of their budgets to the mobile channel - twice as much as the portion dedicated by all other companies.

One-fifth of Best-in-Class retailers (21%), compared to 11% of all others, plan to develop their marketing plan with a unified channel approach. Such an approach allows retailers to map channel-specific components into the overall marketing strategy. By mapping the channel specific components, retail marketers can measure the impact of their multi-channel marketing campaigns more effectively, and develop a unified channel approach to multi-touch campaigns.

The next two sections of this report detail the capabilities and technologies driving Best-in-Class success in a multi-channel retail environment.

Multi-Channel Marketing Capabilities

To execute an effective multi-channel marketing strategy, retailers must develop a foundation of business process, organizational, knowledge, and performance management capabilities. Best-in-Class retailers use advanced analytics, ranging from customer intelligence to campaign effectiveness data, to improve customer satisfaction scores, as well as customer retention and response rates (Figure 3).

According to Aberdeen data, 46% of Best-in-Class retailers, compared to 25% of all others, can use customer analytics for marketing performance management. Data for customer analytics may be derived from online stores, call centers, social media monitoring, and in-store customer data capture, among other data collection techniques. To use these disparate streams of data, retailers must integrate them into a business intelligence tool.

Thirty-eight percent (38%) of Best-in-Class retailers can measure customer channel preferences. Channel preference data, along with customer analytics, allow a retailer to map customer data to channel interaction and usage. This information can be used to create personalized marketing promotions delivered through the customer's channel of choice. Retailers with a holistic view of the customer can conduct targeted campaigns, turning frequent customers into loyal customers. Retailers like Sears Holding Company use advanced customer analytics to tailor promotions to
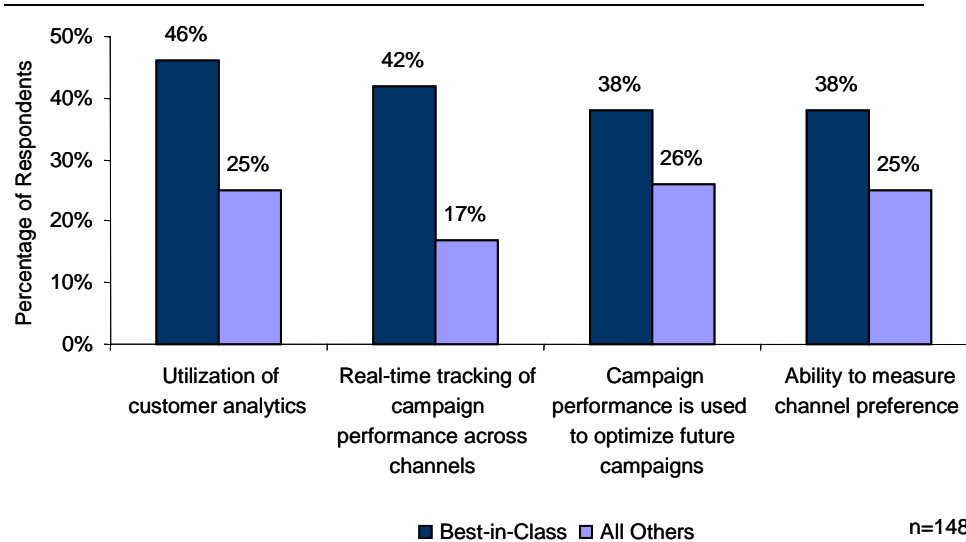
different customer segments, resulting in higher conversion and frequency rates.

Figure 3: Multi-Channel Marketing Capabilities

n=148

Source: Aberdeen Group, May 2011

Forty-two percent (42%) of Best-in-Class retailers, compared to 17% of all others, can track campaign performance across all marketing channels in real-time. Businesses that track campaign performance can make agile decisions based on demonstrable marketing ROI. Retail marketing executives can measure campaign performance by tracking bounce rates, response rates, conversion rates, and click-through rates of the current campaign. As the retail organization measures and tracks these results in real-time, they can execute follow-up campaigns based on purchase frequency or spending thresholds for store, call center, online, social, and mobile channels. Information collected in the tracking process can be used with customer analytics applications to determine future channel-specific marketing campaigns, and map out a complete marketing forecast.

For 38% of Best-in-Class retailers, as opposed to 26% of all other retailers, past campaign performance is a key driver for implementing and optimizing future marketing campaigns. Best-in-Class retailers indicate that pre- and post-multi-channel campaign analytics let them set realistic goals for marketing programs. The CMO's office can make necessary adjustments to messaging or pricing around a campaign based on prior results. Additionally, campaign analytics allow the retail organization to adjust the marketing mix in a shorter time frame. This allows retailers to pull an unsuccessful campaign from circulation, replacing it with another program or re-allocating those marketing funds. Campaign analytics and tracking tools help retail organizations retain current customers, acquire new ones, and make better business decisions.

"Every interaction is a new opportunity and we must understand our customer in order to generate this new opportunity. It's also more effective to maintain current customers than go to the expense of acquiring new ones."

~ Lorna MacGregor, Marketing Manager, Large International Financial Services Company
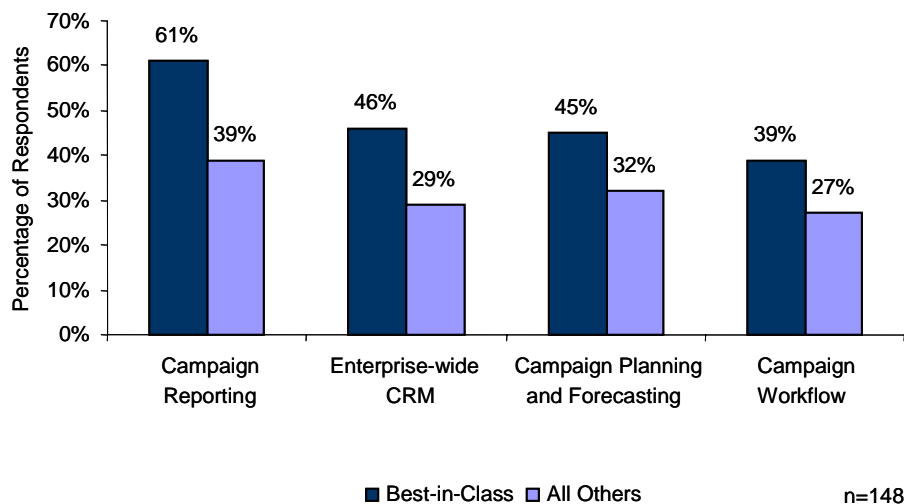
Best-in-Class Enabling Technology

Technological tools help retail marketers plan, develop, deliver, and measure the success of multi-channel marketing campaigns. Best-in-Class retailers use campaign creation and delivery technologies to improve customer response and retention rates. This section will describe how Best-in-Class retailers plan, execute, and measure marketing campaigns and programs for maximum success.

Campaign Planning, Development, and Measurement

Best-in-Class organizations are one and a half times more likely than their competition to use an enterprise-wide Customer Relationship Management (CRM) application (Figure 4).

Figure 4: Campaign Creation and Reporting

Source: Aberdeen Group, May 2011

Such CRM applications can be tied to the Best-in-Class' superior customer analytics, collecting and analyzing all streams of customer data, from purchase history to demographics. This data can help marketers disseminate the right marketing message through the right channel. From the headquarters down to the store associate, employees can access vital customer information via CRM, using it to deliver personalized offers. CRM can also be tied to customer loyalty. According to the February 2011 _Next Generation Customer Loyalty: The Evolution of the Digital Customer_ report, organizations that currently use enterprise-wide CRM to improve customer engagement have seen year-over-year growth in customer retention (18%), frequency (12%), and reactivation (11%) rates. Unsurprisingly, the Best-in-Class make this technology the back-bone of their customer engagement and analytics processes.

The CRM solution is also pivotal for integrating marketing automation tools into the marketing process. Marketing automation tools allow retailers to

"Better knowing our customer's habits through selected reward loyalty programs helps to increase their fidelity and affinity to our brands and thus, marketing campaign efficiency."

~ Marketing Consultant, Small Drug Store, Europe

streamline the development, delivery, and analysis of marketing campaigns, removing time-consuming manual processes. Three processes where Best-in-Class retailers have turned to automation tools are campaign forecasting, workflows, and reporting.

- Forty-five percent (45%) of Best-in-Class organizations, compared to 32% of all others, use campaign planning and forecasting tools to help plan campaign content and copy, offer, budget, and delivery channel. Additionally, Best-in-Class retailers are forecasting response and conversion rates based on prior campaign data and their customers' channel usage metrics. These technologies let retailers benchmark their marketing campaigns across a number of metrics, including customer satisfaction, return on marketing investment, customer response rates, and customer conversion rates. As part of the planning and forecasting process, marketing programs must be coordinated with the merchandising team to ensure that offers are appropriate for the season.

- Best-in-Class retailers are nearly one and a half times more likely than all others to standardize workflows for campaign creation, delivery, and management (39% of Best-in-Class versus 27% of all others). Campaign workflows begin after the planning and forecasting stage, and allow for all marketing stakeholders to contribute to the campaign. A campaign workflow ensures standardized campaign planning, implementation, evaluation, and analysis, and provides seamless campaign management. Brooks Brothers has established campaign workflows for their marketing programs, and as a result they have eliminated the need for channel-specific marketing teams.

- Sixty-one percent (61%) of Best-in-Class retailers, compared to 39% of all others, use campaign reporting applications. Campaign reporting allows a marketing team to track the effectiveness of multi-channel marketing. The reporting cycle lets retailers make informed business decisions based campaign performance. Additionally, Best-in-Class retailers use campaign reports to perform a thorough gap analysis of their marketing process. Once gaps are identified, the CMO's office can decide how to fill these gaps, whether they arise from the content, offer creation, offer delivery, offer redemption, campaign tracking and reporting, or even the workforce management process. In organizations without a campaign reporting application, potential fatal flaws slip through the cracks. The marketing team cannot identify and correct these flaws, or report on campaign success or failure. Without campaign reporting, they cannot reach their full potential to create dynamic marketing campaigns.
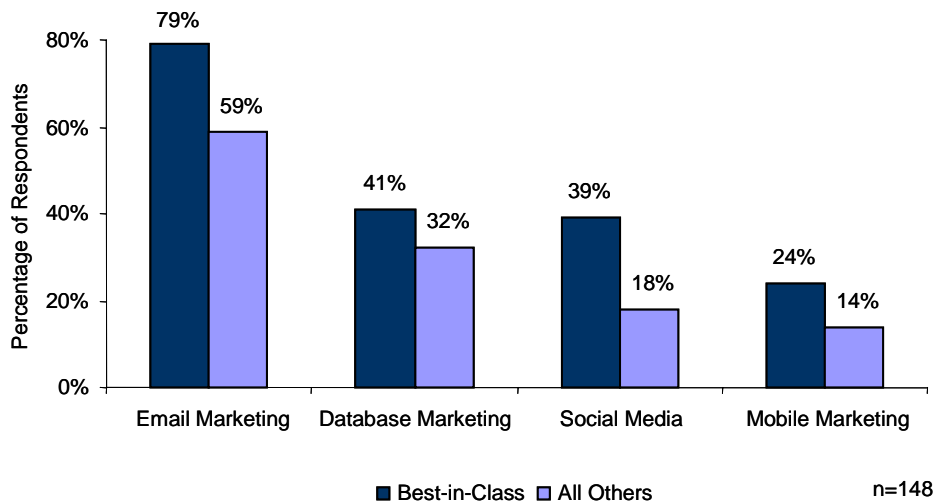
Campaign Delivery

Best-in-Class organizations use an appropriate mix of marketing campaign delivery channels to reach and convert customers and prospects. Figure 5

details the four key multi-channel delivery options helping Best-in-Class organizations get the most from their marketing campaigns.

Seventy-nine percent (79%) of Best-in-Class retailers, compared to 59% of all others, use email marketing as part of their multi-channel marketing mix. Email marketing lets retailers to reach a broad audience cheaper than other methods of direct marketing such as print direct mail. Additionally, retailers can integrate email into their customer analytics application to create targeted and personalized promotions. Gone are the days of email blasts to every customer in a retailer's database. Modern email offers can be targeted by regions, gender, lifestyle, and channel redemption preferences. An additional benefit of email marketing is the ability to base trigger campaigns on recent online purchases or search activity. Retailers can use an email follow-up to measure customer satisfaction with the product and improve brand interaction. The retailer can also trigger emails based on abandoned online shopping carts. Email marketing campaigns can also be incorporated into other delivery mediums; many retailers are developing email campaigns that are delivered through social websites or dynamically created to be read on a smartphone. City Sports, a small sports apparel retailer on the East Coast of the United States, uses email marketing for highly personalized offers, right down to specific brands of apparel or footwear. City Sports' email offers also contain digital coupons that can be printed or downloaded to a smart phone for in-store redemption, as well as direct links to redeem online.

Figure 5: Campaign Delivery Enablers

> "We do not have distinct marketing groups for different channels. Marketing is a cross-channel function, and the team needs to have all the tools at its disposal."
>
> ~ Michael Moseman, Director
> Customer Contact Center,
> Brooks Brothers

Source: Aberdeen Group, May 2011

Forty-one percent (41%) of Best-in-Class retailers, compared with 32% of all others, employ database marketing solutions. Database marketing uses customer information collected at the POS or through the CRM to create personalized communications with the consumer. Database marketing relies on customer analytics to derive a product-, price-, and channel-appropriate

message. Campaigns generated by the database marketing solution are delivered through direct marketing channels such as email, direct mail, mobile, or call center. This application allows retailers to develop targeted offers that can be tracked for response and conversion rates. Customer database cleansing and maintenance is important to ensure that the data is accurate; Best-in-Class retailers are more likely to integrate customer profiles from disparate channels into a single repository to obtain a 360° view of the customer, which allows for more informed marketing decisions.

Social Media for Marketing Effectiveness

With the voice of the customer more readily available than ever before, retailers must turn their attention to social media activity. Best-in-Class retailers are more than two times as likely as all others to use social media tools in their marketing programs, including social campaigns and social media monitoring. Aberdeen's August 2010 _Social Media ROI_ report showed that retailers use social media in a variety of ways, with the highest adoption for social networks, microblogging, blogging, online video widgets, and product commenting. Best-in-Class retailers use a mix of these social technologies to drive brand awareness and affinity, along with incremental sales.

Social CRM is key to measuring how consumers perceive the brand. Retailers like Best Buy and Home Depot use social CRM techniques to monitor their brand across multiple social networks, respond in real time to customer inquiries and complaints, and connect with customers to promote special sales and promotions. As consumers increasingly turn to peer recommendations when evaluating their purchases, retailers must integrate social media in their multi-touch, multi-channel marketing programs.

Mobile Marketing - The Next Wave of Customer Delivery

Best-in-Class organizations are 1.7 times more likely than all others to incorporate mobile marketing campaigns into the marketing mix. Mobile marketing includes the use of mobile couponing via Short Message Service (SMS) or Multimedia Messaging Service (MMS), mobile apps, and mobile web marketing. Mobile marketing allows retailers to reach their customers right in the palm of their hand, with targeted offers that can be redeemed across multiple channels. According to Aberdeen's September 2010 _Mobile Retail is a Reality_ report, the most important elements of mobile retail include mobile web (49%), mobile couponing (43%), smart-phone specific applications (37%), and location-based messaging (33%). While mobile marketing is still a relatively immature marketing medium, Best-in-Class organizations have identified it as a channel that will make a major impact in the next 12 to 18 months.

As outlined earlier, Best-in-Class retailers are investing in emerging marketing channels. To that end, 65% of Best-in-Class organizations have plans to roll out a mobile marketing plan in the next 12 to 18 months. In specific, retailers are ramping up their use of smartphone applications. According to the 2011 _Aberdeen Business Review_, 54% of retail and consumer

"We count on our multi-channel marketing campaigns to not only drive traffic and conversion in our stores - but also for loyal customers to serve as advocates for our stores and refer their friends and family."

~ Marketing Consultant, Small Specialty Retailer, North America

goods respondents plan to invest in mobile application software development in the next 12 months. The impending investment in mobile marketing technology will allow retailers to incorporate mobile campaigns into their multi-touch, multi-channel campaigns. Old Navy recently launched an integrated campaign where consumers can get exclusive deals on their smartphone. Using a smartphone application, customers can tag Old Navy-branded music featured in the campaign. The customer is then routed to a specific landing page to shop for the apparel of the band in the campaign.

Case in Point

Take, for example, the case of a large consumer goods retailer. This company has retail stores around the world as well as a direct-to-consumer online store. As the business has grown, so too have the channels of communication for this retailer. Multi-channel marketing has become a staple for this retailer as their customers interact with the brand through the brick and mortar stores, online store, and mobile and social channels. Customer analytics are the backbone to driving personalized promotions across channels for this retailer. According to the VP of Retail Operations, "We collect a lot of information about customers buying and browsing patterns, especially in the web store, which drives our marketing outreach."

The challenge for this retailer is to keep up with the customer preferences for channel interactions. Two areas where the retailer has seen growth potential is in the use of social and mobile marketing. The retailer uses mobile marketing campaigns to drive customer traffic to the stores, online, and call center. According to the VP, "Social and mobile allow us to interact with our customers in real-time through their channel of choice. We are not re-defining the marketing landscape, but we are reaching our customers where and when they need information." The use of highly personalized promotions has resulted in increased customer response rates, as well as an increase in cross-sells and up-sells in the store and online.

For this retailer, the use of social networks on a mobile device allows for additional brand interactions on the go. The retailer can interact with customers, and deliver highly personalized offers, whether it is a coupon or a special in-store event, across multiple channels while maintaining a single brand identity. According to the VP, "Maintaining a consistent brand during multi-channel interactions is vital. Customers can price-shop channel to channel; consistent messaging and branding allows us to remove the uncertainty, and maintain a consistent price, no matter what channel the customer is using." The retailer views the future of multi-channel marketing and commerce as the convergence of these two technologies, and plans to stay on top of the changing technology landscape.

Key Takeaways and Recommendations

Customer channel preferences are constantly evolving. As new digital channels emerge, retailers should explore new ways to reach the right customer with the right message through the right channel at the right time.

Best-in-Class retailers have shown that the secret to multi-channel marketing success is to invest in new channels, develop a channel integration roadmap, and use customer analytics as the backbone for marketing communications.

For retailers that are re-thinking, re-launching, or just developing a multi-channel marketing strategy, the following steps will spur performance improvements.

Recommendations to Achieve Best-in-Class Results

- **Use customer analytics for campaign development.** While 46% of Best-in-Class organizations currently use customer analytics, only 25% of all other organizations use this technology to drive promotional activities. Customer data is the driving force behind personalized promotions; it allows retailers to truly understand their customer's preferences, affinities, and buying behavior. Customer data needs to be measured and tracked across all channels to develop a holistic view of the customer, including their purchase and media consumption habits. Purging the CRM system of duplicate records and updating contact information are initial steps toward analyzing the data. Once this is done, retailers can develop a data collection process for in-store, online, mobile, social, and call center interactions. Updated data can be used to target customers based on demographics, geography, or their own preferences, and to create appropriate campaigns.

- **Invest in emerging channels as part of the marketing mix.** Best-in-Class retailers are investing in emerging channels, and other organizations should follow suit. An increasing number of consumers are turning to the mobile and social channels for product information and recommendations, as well as for transactions. Retailers should start by allocating a higher percentage of their budgets to developing emerging channels, with a strong focus on the mobile channel. With only 5% of their budgets set aside for mobile initiatives, Other retailers are not able to keep up with their customers' changing preferences, and are missing the opportunity to connect with consumers on the go.

- **Track multi-channel campaign results in real-time.** Currently, only 17% of all other retailers track campaign results in real-time. This capability allows retailers to monitor the performance of marketing programs, from response and conversion rates to the overall ROI, and to break down results by campaign or channel. Until retailers can oversee their campaigns in real-time, business decisions cannot be made to offset lower-than-expected results. At the same time, retailers cannot prioritize successful campaigns within the marketing mix.

Recommendations for the Best-in-Class

- **Upgrade marketing automation software.** Best-in-Class organizations are using marketing automation tools for basic design, delivery, and measurement processes in their marketing campaigns. However, there are other automation tools that are being ignored. Currently, only 24% are using campaign optimization tools, and 23% are using event trigger tools. These two areas represent an opportunity for Best-in-Class retailers to better connect with their customers. Campaign optimization tools can be used to design the most personalized and relevant offer to a customer, with the aid of analytics and data mining tools. Event triggering allows retailers to automatically respond to an event, or missed event, and deliver marketing content based on the interaction. These two tools are examples of how Best-in-Class organizations can better use marketing automation to reach their customers in meaningful and impactful way.

- **Utilize digital couponing as part of the marketing mix.** Currently, only 26% of Best-in-Class retailers use digital coupons. Digital coupons can be incorporated into several distribution channels (email, mobile, social, and online) and as simple as quick response codes or text codes which can be printed and redeemed in the store. Digital coupons are a cost-effective and eco-conscious alternative to printed coupons. The first step implementing digital coupons is to devise a channel specific strategy, and run a test promotion. Once the results have been analyzed, the technology can be expanded to other marketing channels.

- **Continue to evolve the marketing mix.** Best-in-Class organizations are setting the trends for marketing outreach, as demonstrated with their investment in mobile marketing initiatives. However, these organizations need to remain innovative and continue to shake up the marketing mix. For example, currently, only 34% of Best-in-Class organizations are using focus groups or panels to garner customer intelligence and market new products, services, and promotions, and a mere 31% are utilizing customer intercepts for in-store personal communications. These two practices are a great way to get feedback from customers on marketing effectiveness. This information can be used in campaign creation and execution, as retailers can measure response to messaging, offers, channel delivery and redemption, as well as the overall brand image tied to the campaign. Unless Best-in-Class organizations seek out new ways to reach their customers, they will be reliant on traditional marketing methods, and will miss the next wave in customer interaction.

For more information on this or other research topics, please visit www.aberdeen.com.

Related Research	
Rebate Optimization in Retail: Driving Customer Responsiveness; May 2011	Mobile Retail Is a Reality: The Increasing Mobility of Consumers Has Retailers Engaged; September 2010
Next Generation Customer Loyalty: The Evolution of the Digital Customer; February 2011	Restocking the Marketer's Toolbox in the Digital Consumer Age; May 2010

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