

# why 'driving traffic' could drive you out of business



## immersive commerce

An insight paper examining how retailers are pushing products where consumers now shop, in order to drive sales, while balancing brand experience.

Welcome to the future of retail.

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### intro



# Retail is Dead!

Okay, that might be a bit of a stretch for Zimmerman clients, and everyone is tired of hearing it, but truth be told, retail gets harder and harder due to changing trends, techniques, and technologies that drive commerce today. Although the 'Law of Accelerating Returns' has significantly reduced the elapsed time, commerce has clearly undergone a distinct evolution.

It began with Single Channel Commerce, a simple, singular means of reaching your customers. Marketing channels were simple awareness drivers to push consumers to your brick-and-mortar retail store. Four walls and a cash register, with ads to drive traffic and sales. These were much simpler times with the brands fully in control of their commerce strategy.

With the birth of the internet, we evolved to Multi-Channel Commerce, a step forward that would allow customers to choose where and how they shop. Such choices could include brick-and-mortar locations, an eCommerce shopping platform (e.g. Amazon) or a brand's mobile app. While customers had a variety of options presented to them, each mode still must be accessed separately. Marketers then found themselves pushing consumers with some channels to physical retail while new emerging channels focused on driving eCommerce sales. This put the consumer in control of their purchase habits, and made shopping more convenient.

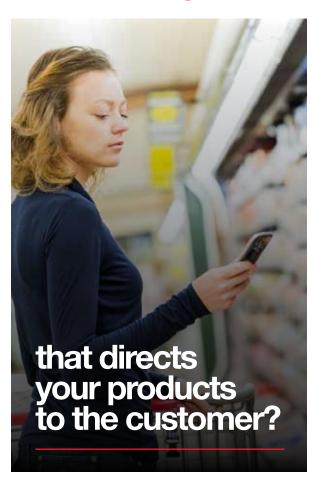
Efficiencies had to be gained, which gave us the progression to Omni-Channel Commerce. This shift served to unify marketing and sales to create a single common experience for customers. Such an experience could potentially include in-store visitors viewing products and deals on their mobile devices, shipping purchases to stores, having in-store purchases shipped to their homes, having stores process returns, and performing exchanges in brick-and-mortar locations. With these advancements, brands now were able to focus on pushing potential customers to their brand with multiple options for purchase path.



Moving forward, it evolved into Unified Commerce. Simply speaking, Unified Commerce offers all the advantages of Omni-Channel, but with one major advantage; it leverages a single commerce platform, eliminating internal channels and their corresponding silos. As such, all aspects of the retail business (inventory, sales, eCommerce, fulfillment, etc.) have visibility into one another. This creates a consistent and frictionless experience that seamlessly guides customers through their purchase journey.

Each step in this evolutionary progression has made it easier for brands to push the consumer to their respective products. Sounds like the ultimate in convenience, right? Seriously, what could possibly be better than a seamless experience that directs the customer to your products?

## well, how about a seamless experience



For more than 35 years, Zimmerman has been the foremost authority in retail marketing and advertising with clients spanning the sectors of QSR, apparel, automotive, hardlines, jewelry, furniture, arts and crafts, grocery and much more. As a result, Zimmerman has pioneered retail-specific proprietary technologies like its Hyperlocal Media Deployment Platform, which hyper-targets consumers within specific trade areas of retail locations in order to serve the right message, on the right device, at the right time, with the right offer by using sophisticated modeling including geographic shopping patterns, psychographic behavior, competitor activity and volume drivers. To complement Hyperlocal, Zimmerman also developed its Customer Acquisition Machine (CAM), which is an Al-powered consumer intercept and deployment system, which identifies predictable consumer purchase triggers within their social media conversations and serves consumers offers in real time.

It's this type of experience that makes Zimmerman uniquely positioned to understand that we are now ready for the next step in the evolution of commerce. Zimmerman is pioneering the shift that we call Immersive Commerce. Rather than pushing the consumer to your brand, Immersive Commerce ignores traditional practices and instead puts your products and services wherever that consumer may be. Based on our deep experience in retail, Zimmerman is particularly able to understand consumers and define the future for how brands will best engage to drive transactions at scale.

Immersive Commerce affects all components of the retail experience, but none so significantly as the online shopping and social platforms. Whereas the consumer would once need to visit a brand's website, and search for a specific product, that brand will now proactively display their products within the marketplace consumers are already browsing. Amazon is not the enemy of retail; it is a key enabler of the Immersive Commerce experience.



#### **Evolution of Commerce**

Single Channel



Multi-Channel







Omni-Channel







Unified Commerce

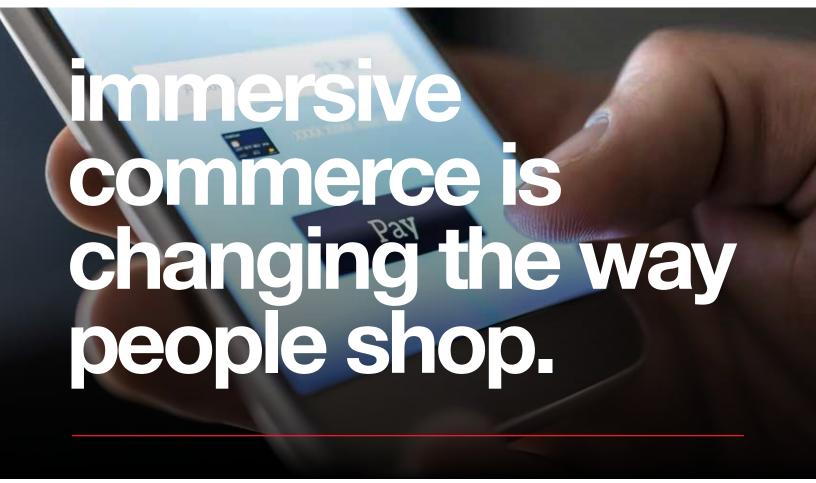


Immersive Commerce



While social platforms (e.g. Facebook, Instagram, Pinterest, etc.) have historically engaged in the sale of consumer data for advertising, the ability to leverage this data to drive a 'buy now' action has been a bit cumbersome. However, as the social platforms continue to evolve, shortening the distance between awareness and purchase, they are finding new ways to drive revenue from their user base, by committing to this enhanced form of commerce.

In this effort, social and shopping platforms are consistently presenting targeted consumers with products and offerings specific to their preferences and reducing the 'traditional' shopping experience to a few clicks. Retailers are seeing improved conversions.



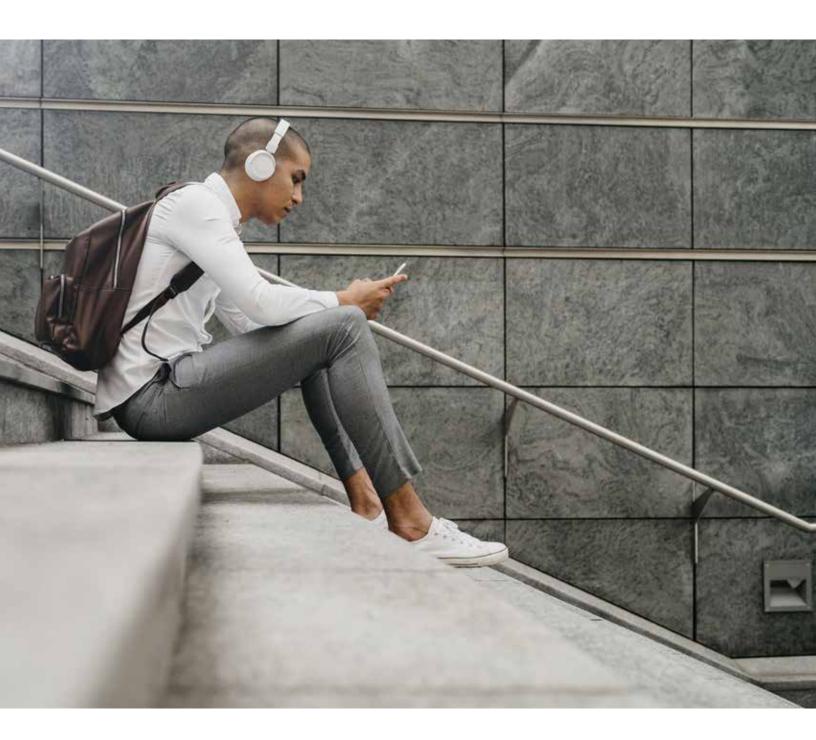
for the major social and shopping sites it's creating ever-increasing ad revenues and unprecedented growth for the platforms.

## we haven't seen a shift like this since the 1990's



when the .com boom brought us the shift to ecommerce.

## platform growth



A key spark in this new shift in consumer buying behavior, and brands joining the immersive commerce experience is the continued growth and emergence of new marketplaces and social platforms. Improved consumer data collection and subsequent targeting are obvious factors in this growth. Consider for a moment Michael Corleone's famous line in The Godfather; "It's not personal, it's business." Well, Immersive Commerce takes that concept a step further, because it is personal and it is business! Individual consumer targeting based upon ever-improving data collection and analysis technologies has transformed traditional social and shopping platforms from general use sites to highly personal online experiences.

Today's users are seeing pages containing videos, banners, and links, all tailored and presented based on their personal preferences. In short, it's all about **them!** And as any successful marketer knows, when a sales offer is designed to meet a prospect's wants and needs, the chances for a conversion increase dramatically. And that is good business!

Not to be overlooked, and just as significant, is the vast improvement in the user experience. Not too long ago, the typical online retail shopping experience was a time consuming process, requiring click after click after click after click..., often discouraging prospective buyers and resulting in drop-offs rather than sales. With the increase in digital purchasing channels and onsite checkout, the online purchasing process has never been faster. And it keeps getting better (remember that 'Law of Accelerating Returns'). For example, MikMak, a mobile video shopping network, saw the opportunity to facilitate checkout for brands on other eCommerce platforms and now offers a "check out on ..." button for social video ads that allows for consumer products to be seamlessly added to shopping carts at retailers like Walmart, Target and Amazon.



in essence, as the technology continues to advance, the buying experience will continue to improve, further delighting and attracting online buyers.



Another significant factor shaping Immersive Commerce is that those brands utilizing the platforms for marketing, especially on the social side, are paying attention and learning with regards to what works and what doesn't. Among the lessons learned is that social commerce appears to be most relevant to lifestyle-oriented retail categories such as apparel, luxury goods, beauty and home decor. As such, traditional brands and direct-to-consumer brands are experiencing increased success on social channels. Those brands that are succeeding have created a recipe comprised of quality design, effective content, authenticity, user-generated content, brand amplification, and clear communication with the target audience. Combined, these facilitate the completion of a transaction.

Last but not least, there is profit. In the music world, it may be "all about that bass", but in our digital world, it's "all about the bucks." A Capgemini report on the future of retail stores claims that a "digital wave" could bring \$2.95 trillion in profits to the retail industry by 2025. A seemingly incredible number for sure, but once we examine the major shopping and social sites in more detail, the reality of this exciting potential will blissfully come into focus.

#### platform growth

## **Amazon**



Although Google has the furthest reach in the digital world, and dominates as the origination point of U.S. search queries, Amazon has rapidly emerged as the place to go for product searches and research. A Feedvisor study published in March indicates that two-thirds of American shoppers start their new product searches on the Amazon platform (based on respondents who have made online purchases in the past two years). Showing a dramatic drop-off, one-fifth of the respondents used a search engine (such as Google), and only 3% chose to scan another marketplace.

Amazon is so well-known and commonly used by internet users that it has become the 'de facto' shopping platform for those users who are searching for specific items. Its attributes, which include a vast array of product offerings, product ratings & reviews, and easy checkout, have created a favorable experience that entices customers to return time and again to search for additional products.

We're seeing the Amazon brand rise above the value of the brands actually being sold on the platform. "Where" consumers buy is as important as the brand they are buying.

### Where do US Amazon buyers start their search for new products?

% of respondents, Feb. 2019

Amazon

66%

Search Engine

20%

**Brand Website** 

4%

Retailer Website

4%

Social Media

1%

Other Marketplace

3

3%

Other

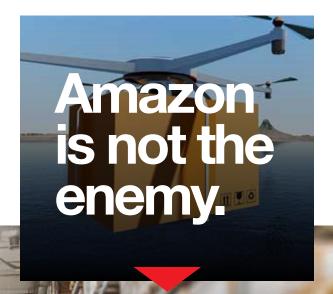
Note: ages 18+ who have purchased a product on Amazon in the past 24 months.

Source: Feedvisor, "The 2019 Amazon Consumer Behavior Report" conducted by Zogby Analytics, March 19, 2019

Feedvisor presented a September 2018 survey indicating that 45% of U.S. brand respondents were not selling their products on Amazon. Said products were probably being marketed by third parties; however, a combined strategy, using both Amazon and third-party marketing, could help brands maximize the potential of Amazon's product page, as Immersive Commerce continues to flourish. As previously mentioned, in addition to selling its own inventory, Amazon permits third-party vendors to list their products for sale on the Amazon website, and also permits them to store their products in Amazon warehouses or ship them directly to customers.

Coupled with allowing advertisers to target consumers based on real shopping and buying data (bringing the product to the customer), advertisers have been enticed to increase spending on the platform. Amazon's size and clout make it an ideal component of a brand's Immersive Commerce ecosystem.

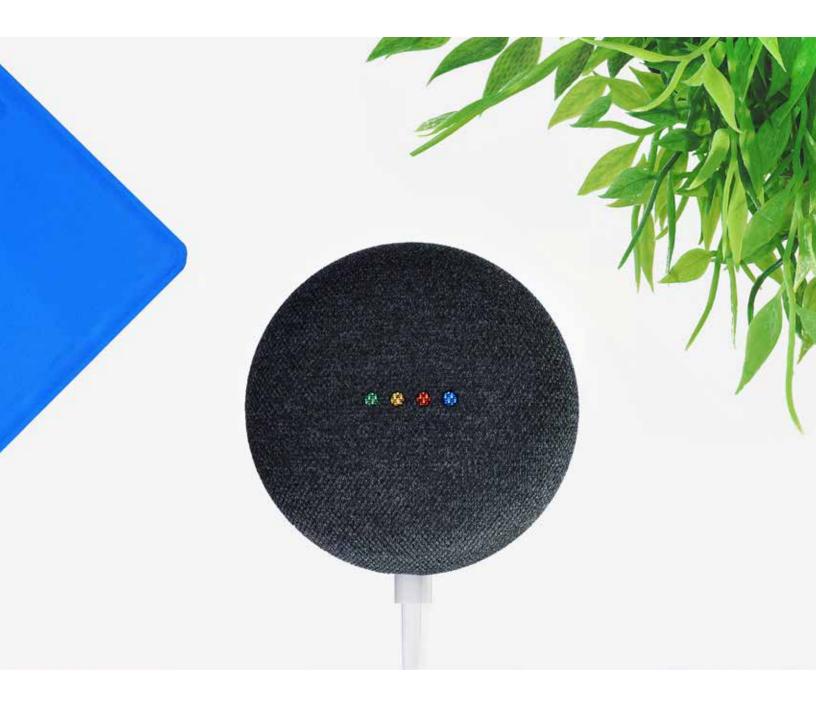
If the user and shopper data isn't convincing enough, the dollar figures surely should be. U.S. advertisers are forecast to spend \$11.33 billion on Amazon's platform in 2019, a 53% increase over 2018. That spend amount is predicted to rise to more than \$15 billion by 2020, a sum that will account for approximately 10% of all U.S. digital ad spending.



it has been the catalyst for this retail evolution, and now creating an Amazon Storefront for your brand is critically important.

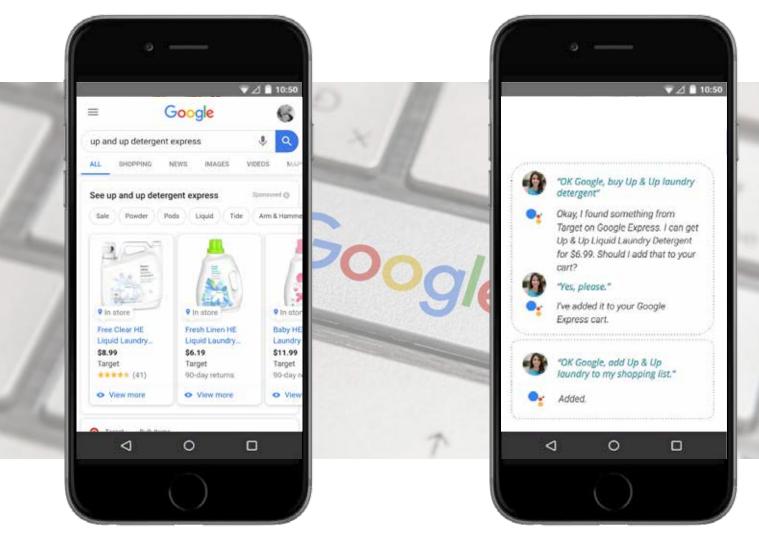
#### platform growth

## **Google Shopping**



"Google Shopping has earned its place in retail," Andre Golsorkhi, founder and CEO of Sidecar, said in a statement. "That's because the channel bridges the mega trends that define eCommerce today - visual content, mobile optimization, relevancy."

Through the first 10 weeks of Q4 2018, Google Shopping clicks grew by 34%, a substantial increase from Q3, as impressions increased noticeably. The most significant rise occurred on phones, where impression growth increased from 55% in Q3 to 111% in Q4. Based upon the Q4 data, Google is enjoying a sizeable increase in its shopping growth, with potentially much more growth to come.



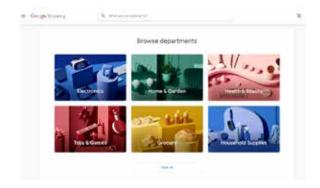
Sponsored Shopping Unit on Search

Google Assistant

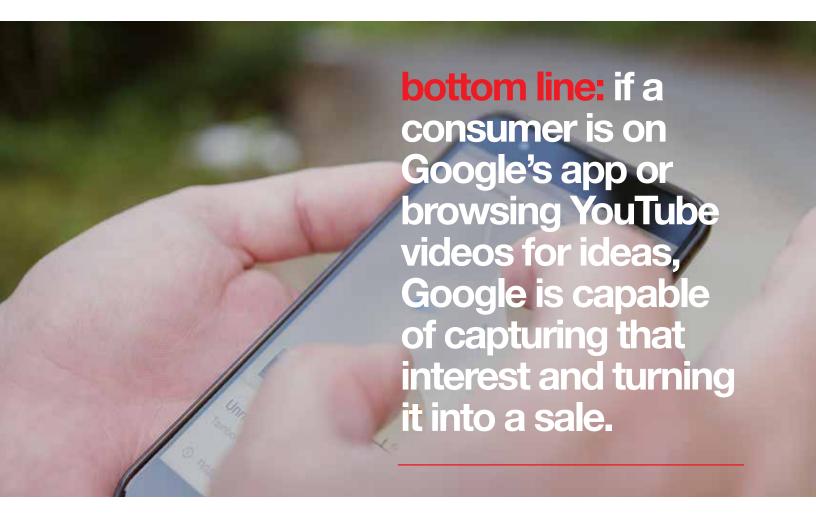
As time passes (remember that 'Law of Accelerating Returns'), new and improved Google Shopping formats, constantly tweaked, will become more important. In fact, Google just announced the overhaul of its Shopping destination. The existing Google Express app has morphed into the updated Google Shopping app so that previous Express users can take advantage of the new shopping products and features.

This initiative by Google is not just intended to match the way that today's consumers shop online, but to supersede it as well, by leveraging existing platforms and increasing its ad revenue.

The new Google Shopping homepage is not your run-of-the-mill homepage; it is personalized to reflect the buying history and online behavior of each individual Google Shopping customer. It includes price tracking functionality, permitting consumers to monitor price fluctuations for targeted items. It offers Google Lens, a smart image recognition technology that lets consumers submit a fashion photo resulting in a web search for corresponding style ideas. It also lets consumers shop via online and local retail outlets, allowing for traditional brick-and-mortar visits and product pick-ups. Google Shopping users can access over 1,000 stores, and enjoy instant checkout using historical data contained within their Google account.



Google's Shopping destination now includes a 'Universal Cart' that addresses its platform of services, with Search, Shopping, Images, and YouTube included. As an added bonus, items purchased via the Universal Cart are backed by a Google guarantee, along with convenient customer service and easy returns and exchanges. Brands that already participate in Shopping Actions for Google Assistant are included in this new purchase experience, which is now going live across Google Shopping, Google.com and the Google Assistant. Shopping Actions will expand to Google Images and YouTube later this year.

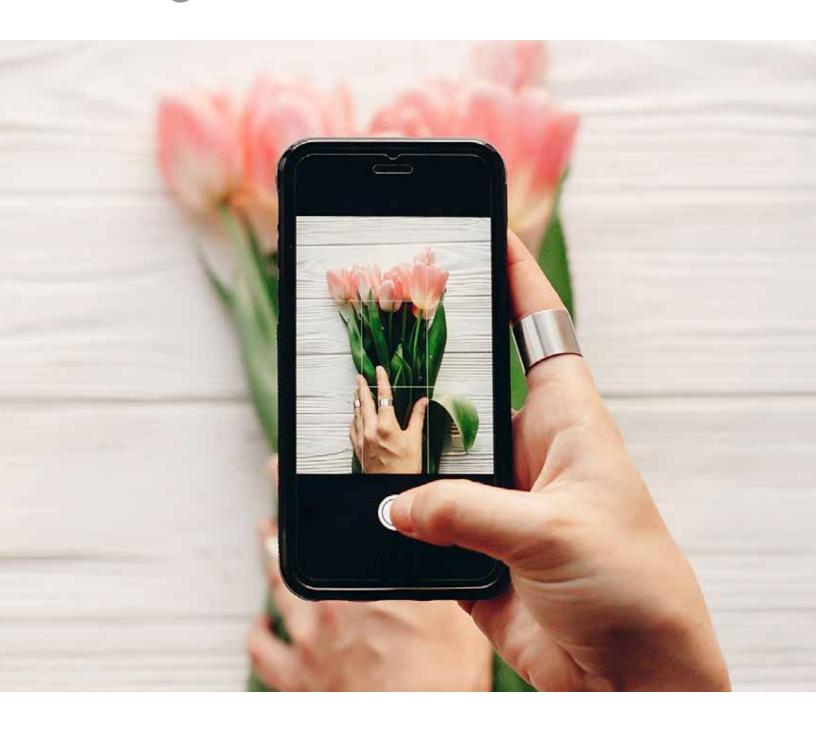




Furthermore, retailers will now be able to optimize their Shopping ads not just by specific goals but also where their ads display. To take advantage of Google's shopping success and enhanced tools, brands need to invest time and resources into feed management, along with tried-and-true campaign optimization tactics such as query mapping. Online advertisers should be vigilant, monitor the new shopping formats & technologies, and jump on those deemed to be effective for their particular brands in order to stand out in as many relevant queries as possible.

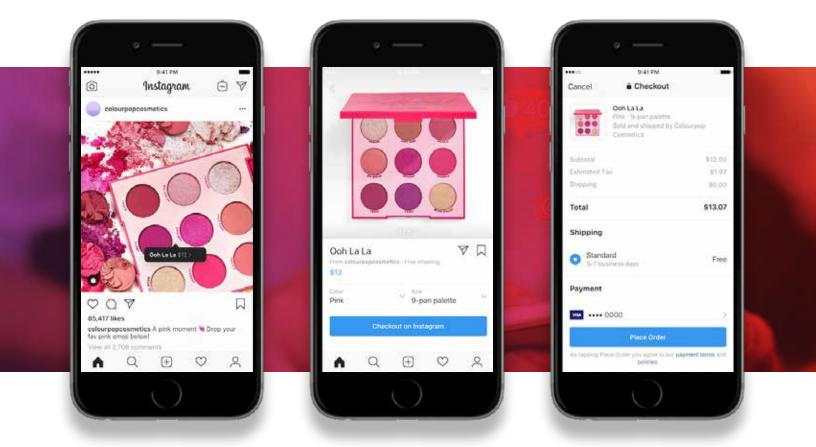
#### platform growth

## Instagram



"The first platform for many marketers is Facebook, mainly because of the size and scale," according to Zvika Goldstein, Chief Product Officer of Kenshoo, a digital advertising technology platform. "But in certain categories, they look at Instagram as the stronger vehicle for eCommerce."

Instagram's distinctive design tends to attract more youthful customers and those brands that correspond to their demographic. The majority of those brands tend to focus on fashion and beauty. As previously stated, social commerce appears to be most relevant to lifestyle-oriented retail categories such as apparel, luxury goods, beauty, home décor, and Instagram has apparently gotten the message. Instagram's offering of relevant content, combined with scale, make it a top marketing destination for those brands whose categorical relevance meets the wants and needs of its user base. If this relevance continues to attract users and in turn drive sales, Instagram should become a major player in the world of online shopping.



Specific to Immersive Commerce, Instagram offers 'shoppable' posts to its customer base. These posts permit participating brands to directly link-back to their respective shopping sites so that the user may seamlessly complete the desired purchase. In addition, participating brand items displayed on Instagram can be tagged with a "View Products" icon, allowing the user to view the price and details prior to purchase.

Continuing to ride the Immersive Commerce wave, in March 2019, Instagram introduced 'Checkout on Instagram.' This enhanced functionality lets participating brands (who've posted targeted product offerings) have their purchasers check out directly within the Instagram app. Due to this progression by Instagram, they've been able to attract additional retail partners, including Nike, Prada, Adidas, H&M, and Warby Parker.



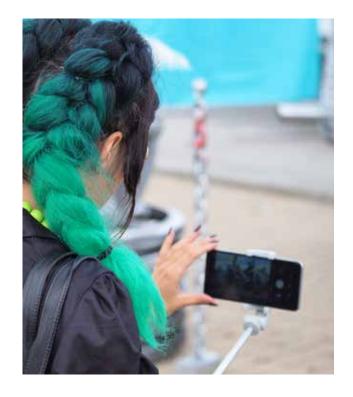






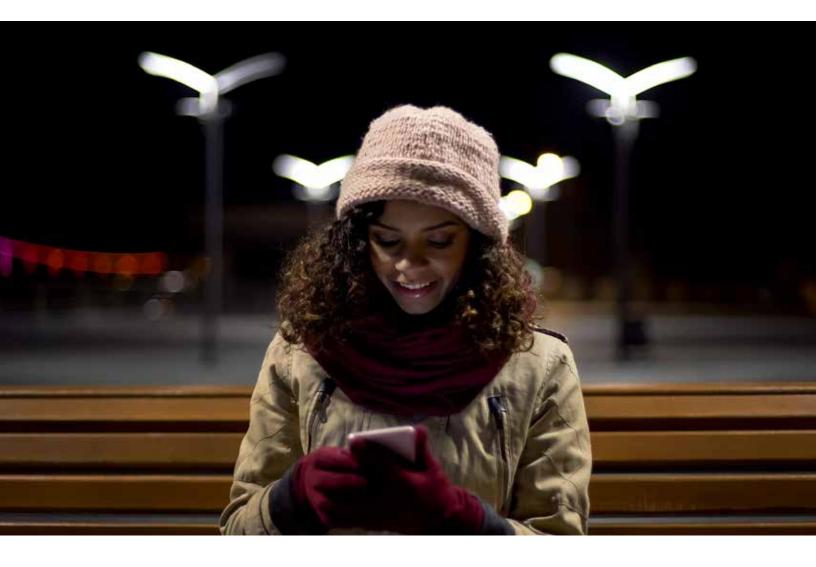
Instagram reports that as of March 2019, 130 million users engaged with shoppable posts every month, up from 90 million in September 2018, when Instagram introduced shopping to its Stories feature. A Gartner L2 analysis shows that brands very much prefer to make their content shoppable on Instagram as opposed to Facebook, with the focus remaining on the retail, beauty, activewear and fashion categories.

impulse buying becomes a simple click as a user scrolls through their social feed. for many retailers, this can be the key to firsttime consumers trying a brand or product.



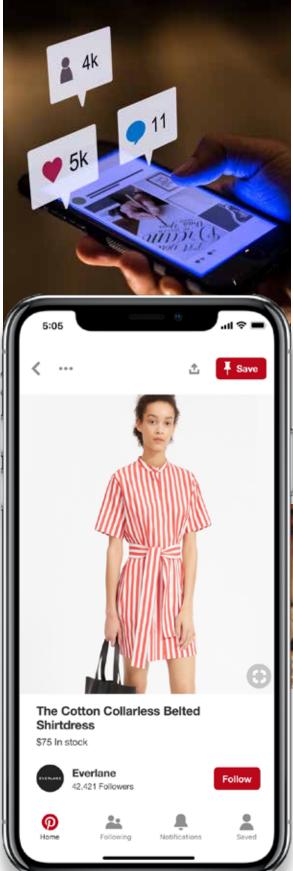
#### platform growth

## **Pinterest**



As previously noted, Facebook and Instagram may have the market cornered regarding fashion and beauty products; however, the Pinterest platform presents significantly more diversity in terms of categories. Pinterest users, through their pinboard creations, have shown that they are not only interested in style trends, but also yearn for the latest & greatest recipes, room redecorating suggestions & products, the latest fabulous travel destinations, the latest music, and the newest technology. In addition to providing relevant content to these, Pinterest has also demonstrated a knack for marketing consumer packaged goods, potentially making the platform a significant player in the social commerce world. This is not just

wild speculation, as a February 2019 survey conducted by Cowen and Company indicated that 47% of social media users see Pinterest as the platform for discovering and shopping for products—more than three times higher than those who cited Facebook or Instagram for the same discovery and shopping routine.



Pinterest may also have an interesting audience advantage for potential marketers. Comscore data cited in Pinterest's March 2019 S-1 filing shows that the platform reaches 80% of American mothers who use the internet. Marketing 101 teaches us that mothers form a key demographic, and possess significant discretionary buying power. Oracle data included in the filing, indicate that Pinterest households spend 29% more than the average household. Having a high percentage of users with discretionary buying power who spend significantly more than the average household should be a noteworthy factor in Pinterest's strategy as they seek to embrace Immersive Commerce.

However, as platforms such as Facebook and Instagram commit to commerce and retailers view the improving conversion numbers, the competition will intensify. With Instagram having introduced 'Checkout on Instagram,' along with shoppable posts, Pinterest needs an efficient "buy" button to keep up. They introduced "Buyable Pins" in 2015, but retreated from that effort in 2018, switching to "Product Pins" that instead pointed conversions to the retailer. "Pinterest needs to follow suit," 4C Insights' CMO Aaron Goldman said. "It's a huge opportunity, and the timing is right for it because the tech has gotten good enough to make it seamless. And more importantly, Instagram and Pinterest are both finally delivering utility around this. Stuffing a buy button into other contexts just wouldn't be welcome. But in these two environments it is, because that's half the reason people are there."

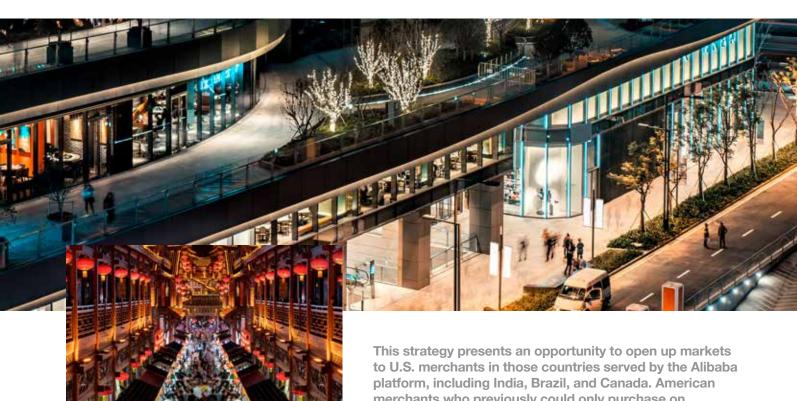


"Pinterest has a significant and engaged user base that it is starting to monetize," said Monica Peart, Senior Forecasting Director at eMarketer. "As it leverages its rich user data and develops its ad offerings and measurements, it has the potential to increase the amount of revenue per user to the levels of Instagram or Snapchat." Peart also stated that, "The audience expansion will help Pinterest reach regular monthly use in a quarter of the US population by 2020, a level reached by Snapchat and Instagram back in 2018 and 2017, respectively."

#### not to be counted out...

## Alibaba

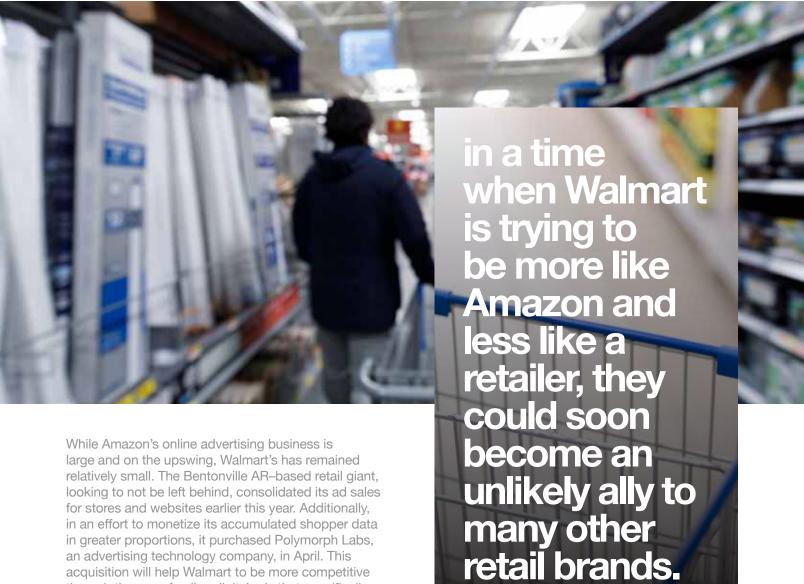
In July, Chinese eCommerce giant Alibaba announced that it will permit American small businesses to market on Alibaba.com. Alibaba is seeking to gain inroads into the business-to-business eCommerce market, as rivals such as Amazon have already established a significant foothold.



Alibaba sells no inventory of its own and hopes to attract local U.S. businesses to their platform by offering small and medium -sized businesses its global selling power. Alibaba is primarily interested in persuading manufacturers, wholesalers and distributors to utilize its massive network. American sellers will pay a membership fee of approximately \$2,000 in order to position their online stores on Alibaba.com, in addition to any marketing and advertising costs. By comparison, Amazon charges its third-party sellers on a 'per month' or 'per item' basis.

platform, including India, Brazil, and Canada. American merchants who previously could only purchase on Alibaba.com will now be able to market to other American-based businesses on the Alibaba marketplace. "You get to compete and act like a multinational company in a way you've never had the tools or technology to be able to do so," said John Caplan, head of North America B2B at Alibaba Group.

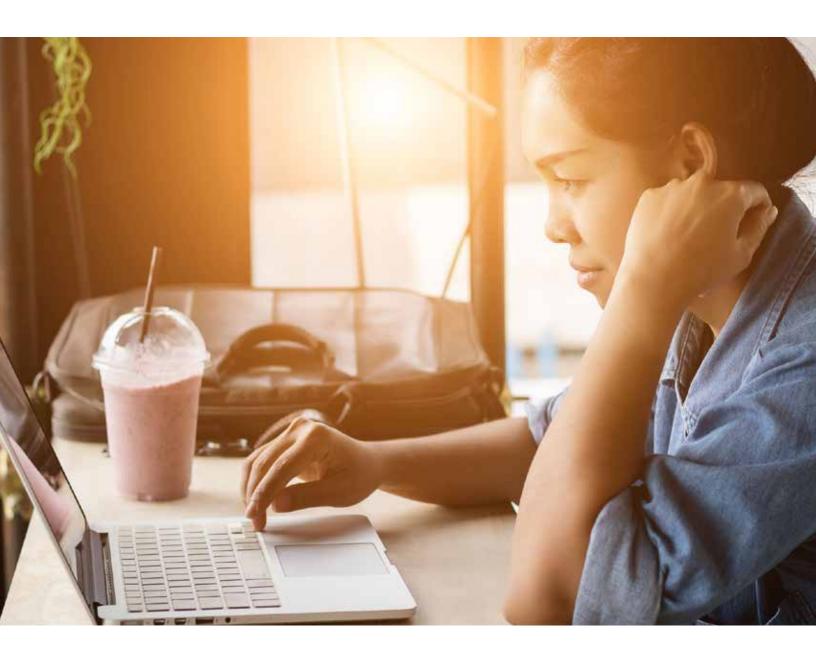
## Walmart



for stores and websites earlier this year. Additionally, in an effort to monetize its accumulated shopper data in greater proportions, it purchased Polymorph Labs, an advertising technology company, in April. This acquisition will help Walmart to be more competitive through the use of online digital ads that specifically target shoppers based upon their respective data and shopping behavior.

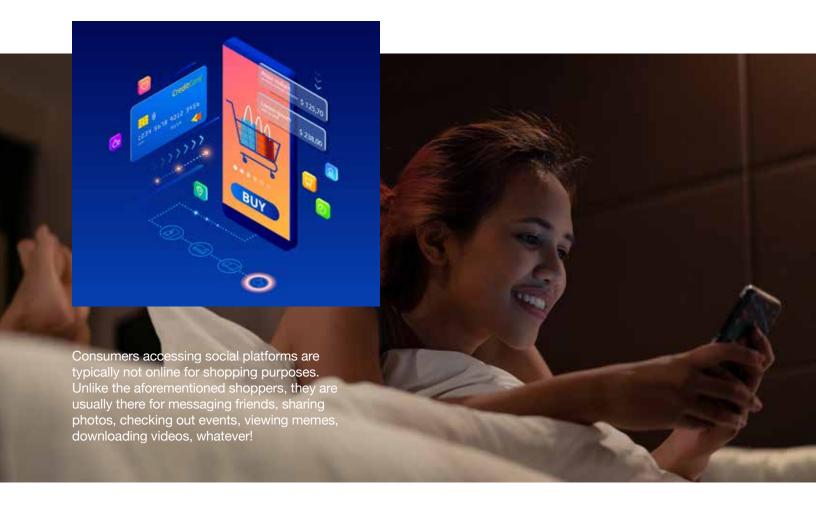
Polymorph's technology boasts a high-speed ad server, self-serve interface, and server-side header bidding, a combination that should facilitate advertising for Walmart's various brands by delivering more refined consumer relevant ads at a faster rate. "We have a tiny ad business," Walmart CEO Doug McMillon told investors last October, according to a report by Bloomberg. "It could be bigger." Having put "their money where their mouth is" with the Polymorph Labs acquisition, they are assuming a forward-looking posture with hopes of becoming a major player in the Immersive Commerce arena.

# online consumer behavior & trends



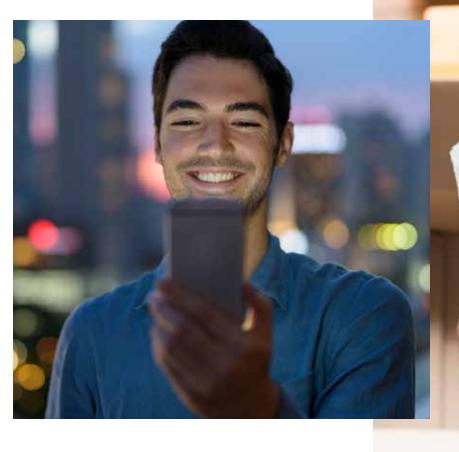
eCommerce, whether conducted through shopping or social platforms, shares many common behaviors and traits. Conversely, there are a number of behaviors and traits unique to each respective platform experience. We will start by examining the differences.

Consumers who access shopping platforms are there for an obvious reason; to search, review, and potentially purchase products. They are not there in a social sense, such as messaging friends, sharing photos, checking out events, viewing memes, downloading videos, whatever. They are there for one reason and one reason only; shopping!



While eCommerce is the primary purpose of shopping platforms, it is an ancillary feature on the social platforms. "You don't go on social with the expectation of going shopping—you thumb through content and stumble across things you didn't know existed. It's effectively a discovery platform," said Apu Gupta, CEO and co-founder of visual commerce platform Curalate.

The smart marketers, cognizant of the tremendous user base that comprises these platforms, continue their efforts to tap into this group, constantly learning and understanding what does and doesn't work in the social commerce arena. They have discovered that social commerce best functions for those products with visual appeal, including apparel, luxury goods, beauty, and home decor, which is consistent with the previously discussed relevancy of lifestyle-oriented retail categories on social sites.



This assertion is backed up by a February 2019 report from the social media metrics firm Sharablee, whose data reveals that the majority of retail-related social actions (e.g. 'likes,' comments, shares, etc.) occurring on Facebook, Instagram, and Twitter were in the 'Apparel & Accessories' (58%) and 'Health & Beauty' (32%) categories. Vacation packages, due to their complexity and number of clicks required, do not lend themselves to social page purchases. But a bottle of skin rejuvenation cream or a reasonably priced accessory pillow – requiring few clicks and little time – typify the types of product offerings that tend to do well in social commerce.

The data indicates that they are making significant progress. An eMarketer Ecommerce Survey, conducted by Bizrate Insights, shows that the percentage of U.S. internet users that completed a social commerce transaction increased from 23% in December 2018 to 29% in April 2019. Correspondingly, proportions for all major gender and demographic segments (except 55 and older) increased, especially among females (up 10 percentage points to 36%) and millennials ages 18 to 34 (up 9 percentage points to 42%).

Putting differences aside, there are some definite trends and preferences that are common among online eCommerce users, whether they are using shopping platforms, social platforms, or both. Despite the two distinct platform types and corresponding functionalities, there are a number of topical areas which seem to foster mutual agreement.

The environment is one of those areas. There is a rise in consumer awareness regarding the environmental and ethical footprints created by their respective purchases. These concerns include 'real' or 'hidden' impacts and costs, including manufacturing methods, shipping, excessive packaging, and sustainability. Many consumers are rewarding retailers who engage in 'green' practices with their loyalty, and more importantly, shopping dollars.

Product content is another area. Today's internet shopper has become savvy, and will not settle for mediocre marketing. To become and remain successful, online retailers must provide and maintain quality images & videos, logos, product descriptions, names, stock availability, reviews, promotional information, and pricing. All of these are necessary for the consumer to make an informed buying decision. Failure to do so could drive the consumer to another retailer, one who appropriately meets the contextual needs of the consumer.

Online shoppers, regardless of platform preference, agree that prices and shipping fees significantly influence their shopping decisions. The 2018 Online Consumer Behavior Study (by Namogoo) showed that this was a concern for over 90% of their respondents, with 77% citing shipping and extra fees as primary reasons for exiting their online shopping carts prior to purchase completion. This same study indicates that over 55% of respondents are likely to click on ads that appear on retailer sites offering the same product at a lower price. In addition, 80% of visitors who end up purchasing on the discounted site are likely to buy again from that site.

ease-of-use is a constant desire of online consumers, regardless of platform and shopping preferences.

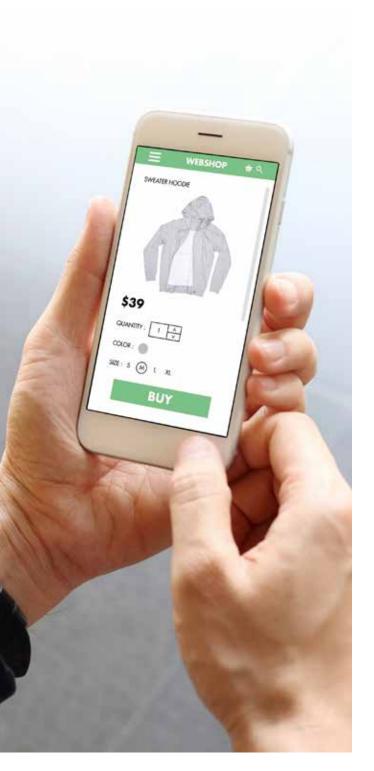


today's shoppers want to be able to complete their purchases without having to leave the platform. they want minimal clicks and easy checkout. again, being savvy, they know that the technology is available and will flock to those retailers who utilize it...and will shy away from those who don't.

## conclusion

After years of experience, compiling the research, and defining this evolution of Immersive Commerce and all that it entails, the first word that comes to mind is "wow!" Seriously, has there ever been a better time for retailers to take advantage of targeted product marketing using the latest digital technologies and techniques? We strongly think not!





Consider the current landscape. With the proper expertise, retailers can now seamlessly direct their products to their customers, via their own websites, social media, or someone else's shopping platform! As a result, the major shopping and social sites are experiencing ever-increasing ad revenues as their platforms grow. In conjunction with this growth, participating retailers are reaping the benefits as witnessed by a dramatic decrease in drop-offs and significantly increased conversions. Individual consumer targeting based on data collection and analysis has evolved from guesswork to science, allowing retailers to offer specific products to specific consumers wherever that consumer may be at any given moment on the internet.



Shopping cart and checkout functionality, once a cumbersome process, has been reduced to a click or two, based on previous consumer interactions. With the latest digital technology, industry experts are predicting a potential \$2.95 trillion in profits for the retail industry by 2025. Don't just take our word for it; shopping platforms and social media sites such as Amazon, Google Shopping, Instagram, and Pinterest have embraced Immersive Commerce in terms of investment and philosophy, with other companies such as Walmart and Alibaba recently jumping into the mix.

Such expertise is not always easy to come by; however, a full-service retail advertising agency such as Zimmerman will provide all of the critical components needed to successfully design your Immersive Commerce roadmap and advertising campaigns. Being retail specialists, we are pioneering this evolutionary push for our clients using our proven formula for success, BrandTailing®, that requires quality creative, great content, appropriate brand amplification, effective communication with target audience (young & old), and most importantly, driving sales. Our experienced personnel are at the forefront of data capture & analysis, creative & content production, and strategic ad placement, while staying current with ever-evolving technology and media methodologies. We never employ a 'one size fits all' strategy, developing tailored solutions and strategies to meet the unique requirements of every client.

are you ready to take advantage of the shifting landscape? imagine going back to the early '90s and having someone tell you, now is the time to build your eCommerce website. this is the caliber of opportunity you have today. Zimmerman can help you take more than your fair share of the \$2.95 trillion in profits coming into the retail industry with our immersive commerce strategy.

## welcome to the future of retail.





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24/7 (seriously)

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