



Mobile Fast Food Marketing:

How QSRs and Fast Casuals Are Getting Quicker and Faster



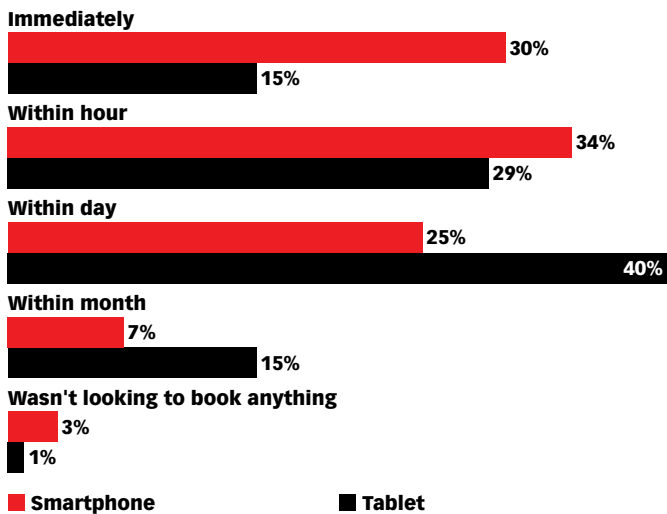
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Executive Summary: From the appropriation of factory assembly lines to the invention of drive-thru windows, the fast food industry has always looked for new ways to streamline the process of moving meals from kitchen to customer. Mobile is the latest tool to help further that goal for restaurant operator and patron alike.

Timeframe from Searching for Restaurant Information to Purchase Among US Smartphone vs. Tablet Users, June 2012

% of total



Note: among smartphone/tablet users who look for restaurant information via their device; numbers may not add to 100% due to rounding; read as 30% of smartphone users who search for restaurant information on their device make a purchase immediately
Source: xAd and Telmetrics, "Mobile Path-to-Purchase: Restaurants," Oct 3, 2012

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How Fast Food Customers Use Mobile	2
Who Uses Mobile for Fast Food?	3
How Fast Food Marketers Use Mobile	3
Mobile Payments: Wave (and Pay) of the Future?	6
Conclusions	8
eMarketer Interviews	8

For consumers, the question of what to eat is often followed by "What's nearby?" Today, smartphones are where many are turning for guidance. With the help of store locators, menu finders, mobile coupons and ordering apps, searchers are making more dining decisions while on the move.

This report looks at how consumers are using mobile to find and order fast food, and how fast food marketers are using mobile to communicate with customers. It also considers mobile payments, an early-stage technology with significant potential for the industry.

Fast Food Defined

Quick-service restaurants (QSRs), traditionally no-frills, and fast casuals, typically higher-priced and perceived as better quality, are two distinct industry segments. However, this report will address both under the broader umbrella of fast food, with insights applicable to either.

Diners don't articulate preferences in terms of segments, even if they may favor a QSR like McDonald's or a fast casual like Five Guys Burgers and Fries. Likewise, marketers themselves are beginning to blur the lines between segments in response to changing business fortunes and evolving consumer tastes. Taco Bell's new Cantina Bell menu, for example, is more than a nod to fast casual Chipotle Mexican Grill. For its part, Chipotle is considering the addition of QSR-style drive-thrus and breakfast items.

Key Questions

- How many restaurant searchers are in their cars when looking for a place to eat?
- Do restaurant marketers need to have apps?
- Are fast food diners ready for mobile ordering?
- What's the level of consumer interest in mobile payments and wallets?



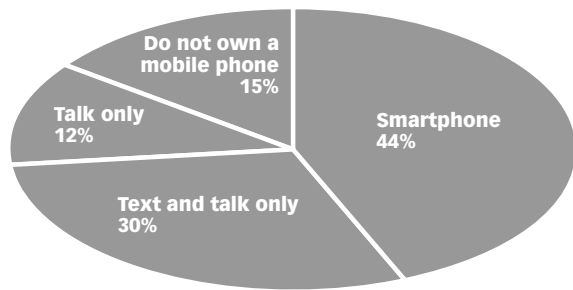
How Fast Food Customers Use Mobile

Fast food customers are more likely to own smartphones than the general public. Forty-four percent of consumers who eat fast food at least monthly owned smartphones in the last quarter of 2011, according to foodservice research firm Sandelman & Associates. That's 14 percentage points higher than eMarketer's estimate of overall smartphone ownership for the same period.

More recent data on fast food customers' ownership of smartphones isn't available. However, it seems likely the trend would have held, given that some key early smartphone-adopting groups (younger men and moms) are also likely to be fast food consumers.

Mobile Phone Ownership Among US Quick-Service Restaurant Users, Q4 2011

% of total



Note: ages 16-64 who purchase fast food at least once a month; numbers may not add up to 100% due to rounding
Source: Sandelman & Associates as cited in company newsletter, April 4, 2012

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Not only are fast food consumers carrying smartphones, they are using the phones to look for dining options. According to YP, 24% of mobile searches on its network in September 2012 were for restaurants, the largest share of any category.

When consumers use their phones for fast food restaurant searching, proximity is very important. Location-finding was the leading usage among 45% of smartphone owners surveyed by Sandelman & Associates, and took the top two spots with smartphone and tablet users in a June 2012 xAd and Telmetrics study.

Leading Mobile Restaurant Search Activities Among US Smartphone/Tablet Users, June 2012

% of respondents



Source: xAd and Telmetrics, "Mobile Path-to-Purchase: Restaurants," Oct 3, 2012

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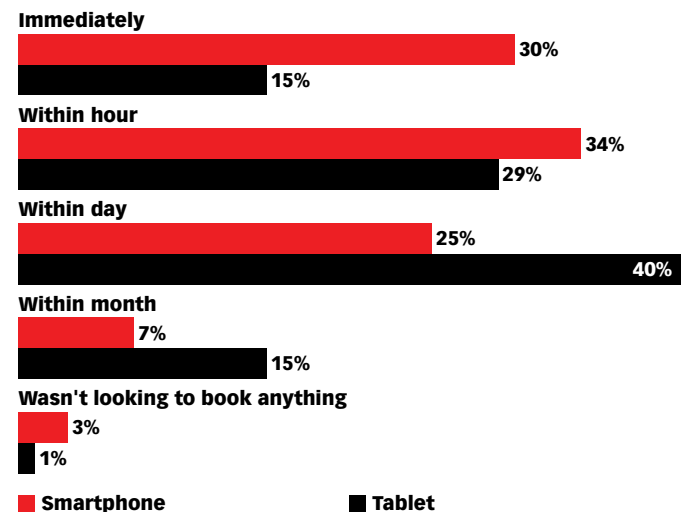
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Similarly, xAd and Telmetrics found that 64% of smartphone users searching for restaurants expected results within walking or driving distance, 8% higher than tablet users, a group that behaves more like laptop owners.

The same study also pointed up the immediacy of mobile restaurant searchers. It found that a majority of restaurant searchers (51%) were in their cars when looking and nearly two-thirds (64%) purchased their meal within an hour of their search. Eighty-four percent of smartphone users eventually converted.

Timeframe from Searching for Restaurant Information to Purchase Among US Smartphone vs. Tablet Users, June 2012

% of total



Note: among smartphone/tablet users who look for restaurant information via their device; numbers may not add to 100% due to rounding; read as 30% of smartphone users who search for restaurant information on their device make a purchase immediately
Source: xAd and Telmetrics, "Mobile Path-to-Purchase: Restaurants," Oct 3, 2012

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Unlike with special-occasion or even casual dining, reviews, reservations and other in-depth information are less important with fast food seekers. No one needs to read up on a fast food restaurant's décor, ambience or menu specials—nearly everyone knows what to expect from a SUBWAY or Panera Bread—before committing to a quick and economical meal.

But data varies when it comes to searchers using brand names. xAd and Telmetrics found that fewer than half (48%) of restaurant searchers used brand names in their searches. But YP found that a higher percentage of users, 55%, used brand names.

While these figures are different, clearly a large number of searchers already have a restaurant brand in mind when they search, a signal not only of the importance of brand messaging but also of the need to stay top of mind with mobile users and not just wait until search behavior kicks in.

Who Uses Mobile for Fast Food?

Demographically, mobile restaurant users tend to be younger. Technomic found 36% of those in the 25-to-34 age range considered restaurant mobile apps important or very important, compared to 22% of all respondents. A separate Technomic survey substantiated this by showing that millennials used their phones to look at menus and check in to restaurants more often than did Gen X or baby boomer internet users.

Digital Restaurant Activities of US Internet Users, by Generation, Aug 2012

% of respondents in each group

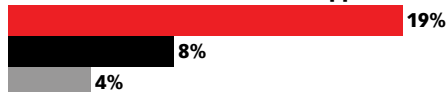
Look at restaurant menus online via mobile phone/smartphone



Follow restaurants via social media



Check in at restaurants via an app



■ Millennials ■ Gen X ■ Baby boomers

Note: activities performed "often" or "very often"
Source: Technomic, "Understanding the Foodservice Attitudes & Behaviors of Millennials" as cited in press release, Nov 6, 2012

147138

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The largest group of mobile restaurant users, according to xAd and Telmetrics, was also in the 25-to-34 age set (26%) but Gen X (ages 35 to 44) wasn't far behind at 21%. The most significant difference highlighted in this study was the gender split: 69% female vs. 31% male.

Considering the diversity of QSR and fast casual offerings, the stereotype of fast food as cheap fuel for guys isn't wholly accurate. And mobile, with its potential time- and money-saving qualities, can cross demographic lines as well. Noah Glass, CEO and founder of OLO, an online- and mobile-ordering provider, said, "Very early on, we had seen that some of our top users were served in the soccer mom demographic, and that was shocking to us because we thought the future user would be young, male and technology-oriented."

How Fast Food Marketers Use Mobile

Right now, many marketers are just trying to figure out which mobile initiatives are most useful for assisting customers, streamlining restaurant operations and targeting promotions with more precision.

Among both QSRs and fast casuals surveyed by the National Restaurant Association in November 2011, mobile was high on the list of technologies restaurant operators planned to adopt over the next two years. Smartphone apps ranked second among QSR operators and third with fast casuals. Text messaging hadn't been abandoned, either.

Expected Use of Select Social and Mobile Marketing Tools According to US Quick-Service and Fast-Casual Restaurant Operators, Nov 2011

% of respondents in each group

	Fast-casual	Quick-service
Facebook	96%	91%
Online review sites such as Yelp	91%	75%
Smartphone applications	90%	83%
Twitter	87%	80%
Text messaging	86%	73%
YouTube or other video-sharing site	77%	77%
Restaurant blog	71%	65%
Flickr or other photo-sharing site	65%	51%

Note: in the next two years

Source: National Restaurant Association (NRA), "2012 Restaurant Industry Forecast," Feb 1, 2012

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Promotions and Coupons

Coupons have always been a hit with fast food consumers and some of this deal-seeking behavior has begun shifting to mobile. eMarketer forecasts there will be close to 35 million mobile coupon users this year, equal to 16.3% of all mobile phone users. This figure is small compared to the 92.5 million online coupons users overall, but is set to grow 58% in 2012, largely because of the rise of smartphone ownership.

Smartphone users are increasingly comfortable with using their device for coupons. Over half (52%) of smartphone and tablet users surveyed by Prosper Mobile Insights about mobile fast food habits had used their device to show a cashier a promo code or have a barcode scanned in 2012, a rate 24% higher than in 2011.

Mobile marketing platform Cellit dug into consumer promo preferences in a 2011 survey of participants in a national QSR campaign. When presented with a buy-one-get-one offer vs. a percent off vs. a free-with-purchase deal, the BOGO won by a landslide (68% vs. 22% vs. 6%).

Cellit's CEO, David Wachs, stressed the importance of learning your customers' likes. "What's more important than buy-one-get-one

vs. dollar-off is just that act of asking what they want,” he said. “Building that two-way interaction and creating that trust that accompanies it is very powerful, and unique to mobile.”

Restaurants are becoming more sophisticated in their mobile marketing, with location-based offers and catering deals based on time of day or even on the local weather. Tropical Smoothie Café, for example, has taken advantage of mobile’s flexibility by offering icy beverages when it’s hot and sending out offers for soup when it’s cold in a bid to drive in-store traffic. And Burger Life has used push notifications advertising extra rewards points to boost traffic during slow dayparts.

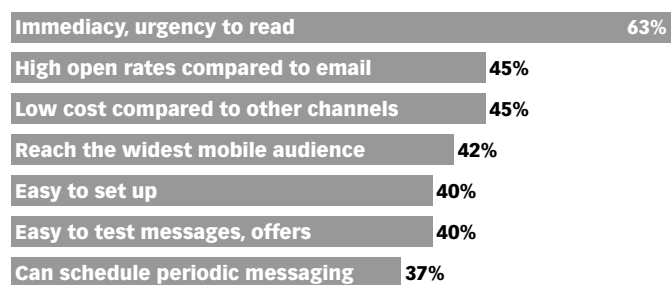
The First Wave of Mobile Messaging Still Rolls

Even with smartphones gaining steam, text messaging hasn’t yet been completely usurped by apps and the mobile web. It was still the preferred method of receiving coupons among 36% of smartphone and tablet owners surveyed by Prosper Mobile Insights in September 2012.

Texting is popular with marketers due to its immediacy, low cost, effectiveness and functionality across mobile devices—all benefits cited by those surveyed in May 2012 by Chief Marketer.

Benefits of Text Message Campaigns According to US Marketers, May 2012

% of respondents



Source: Chief Marketer, "2012 Mobile Marketing Survey," June 5, 2012
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Cellit was built around text promos and has created SMS campaigns for QSRs like KFC, SUBWAY and Taco Bell, so the company has a stake in the SMS model, but Wachs argues that texting complements other communications because of its speed and ease. “You just text one word to a five-digit or six-digit number and you’ve joined that list. It’s just a very simple, straightforward way to raise your hand and say you’re interested in a brand and want to join in the mobile conversation,” he said. “We don’t see it being overtaken by push notifications.”

Brand-building consultant Denise Lee Yohn also thinks texting is compatible with other communication methods because it requires less commitment. “I don’t know how many people really want to look at a 2-minute video on their phone while they’re trying to decide which fast food restaurant they’re going to go to.”

But if they get a text message that says, ‘Introducing our new XYZ sandwich, now at \$4.99, come get ‘em today,’ that’s a much more effective way of engaging the user.”

Apps vs. Mobile Web

Fast food marketers are using both apps and mobile-optimized websites to reach customers. The general consensus is that, currently, a mobile-optimized website is essential, especially for providing the quick information fast food searchers seek. Apps, while perhaps not quite essential, are increasingly valued for the ability to provide customer engagement.

xAd and Telmetrics found mobile websites received 12% of restaurant internet traffic, compared to 8% by apps, but users spent more time with the latter—14 minutes per month as opposed to 5 minutes and 16 seconds on the mobile web.

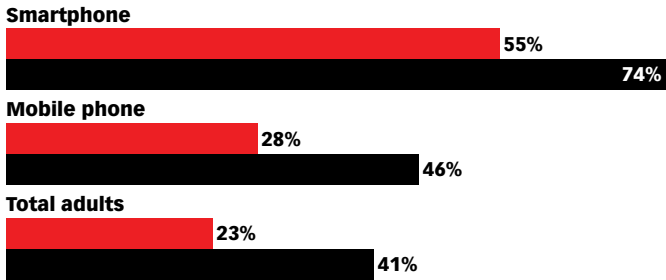
Domino’s Pizza is one restaurant chain that provides ordering capabilities through a mobile website and apps. Dennis Maloney, the company’s vice president of technology, sees advantages for both: Sites reach the widest number of devices and can be a “vehicle which supports deep linking and email marketing,” while apps retain the functionality of a user’s device, allowing for familiar smartphone swiping as well as “capabilities such as location awareness and notifications.”

Location-Based Marketing

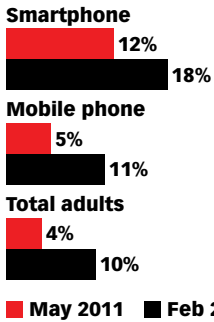
Location-based marketing conjures up the idea of “check-ins,” a mobile practice that has yet to resonate with users despite a multitude of services rising and falling over the past few years. (Pew Internet & American Life data shows that only 10% of US adults had used check-in services as of February 2012, with slightly more participation among smartphone owners.) It would appear that consumers care more about the practical benefits of geolocation (finding what’s near to them) than broadcasting their whereabouts to others and earning virtual awards for having done so.

US Consumers Who Use Location-Based Services, by Device Owned, May 2011 & Feb 2012
% of respondents

Use location-based information



Use geosocial/"check-in" services



Source: Pew Internet & American Life Project, "Three-Quarters of Smartphone Owners Use Location-Based Services," May 11, 2012

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The ultimate geotargeting goal is being able to beam mobile coupons as a potential customer approaches a business, an action promised by Apple Passbook. Companies like shopkick and Placecast have designed solutions to enable this, and foursquare, pioneer of the check-in, debuted "Local Updates" in July 2012 to facilitate pushing nearby offers. The audience for these deals, however, is limited to consumers with the awareness to download the necessary apps.

Loyalty and CRM

Generally speaking, marketers are underutilizing mobile for relationship-building and for integrating loyalty programs. These were two findings from a 2012 global CMO Council survey. Just 18% of respondents were using mobile for acquiring or re-activating customers, and only 10% were managing loyalty and rewards as part of mobile marketing activities.

One of biggest boons to restaurant operators is the CRM potential in customer lists derived from mobile. Cellit's Wachs has found that mobile subscribers are eight times as responsive as email subscribers, even if the mobile list is smaller than the email version.

"In some ways mobile is replacing the email address and the computer in terms of the way that marketers can develop their customer databases," noted Yahn.

Savvy to the value exchange, restaurants have been reaching mobile users and increasing their subscriber lists by offering deals to those who opt-in to promotions. Qdoba Mexican Grill has used this simple yet effective approach. In 2011, the fast casual offered 20% off a first order for those who texted in and signed up; in 2012, it offered a free taco for the same action.

Paul Coletta, chief marketing officer for grilled cheese chain The Melt, finds ordering behavior valuable not just for targeting but for improving customer experience. "From what you order to where you order it to 'Do you always get a lemonade?' to 'Do you sometimes buy one of our home-baked cookies?'"—everything there is to know about your ordering behavior we can capture, once you've opted in to an online registration with us," he said.

Jersey Mike's Subs turned to mobile for its Shore Points Rewards program in order to glean more data than was possible with its paper punch cards and to improve the delivery of offers and to speed up checkout.

Using a solution from Skypop, Jersey Mike's had signed up 650,000 members for its 6-month-old digital loyalty program as of October 2012. The company said 40,000 members were using the program's mobile app and 93% had opted in to receive text message updates and offers. Eleven percent of the program's members dine at Jersey Mike's at least three times per month, compared to 7% of non-members, according to the company.

Order-Taking

Mobile ordering hasn't yet become ubiquitous—only a quarter of smartphone and tablet users surveyed by Prosper Mobile Insights had done it—but a good number of those who had ordered ahead of time credited mobile with improving the dining experience. Sixty percent said it made the experience at least a little better, and there were very few detractors.

Speeding up the ordering process and impatience with lines were the leading reasons (73.3% and 52.3%, respectively) why internet users surveyed by online- and mobile-ordering provider Splick-it in May 2012 had ordered food online or via apps. Similarly, 27% of smartphone users surveyed by AisleBuyer in February 2012 said they "hated" waiting in lines at QSRs.

Fast food restaurants have been quick to recognize the benefits of offering mobile ordering. Pizza chains, likely because of their focused menus already optimized for takeout and delivery, were some of the first types of restaurants to provide mobile ordering. In late 2007, Papa John's began offering text ordering and by 2008 it said it had reached \$1 million in mobile sales. Pizza Hut joined at the start of 2008, presenting both web and text options.

What was once experimental has become solidly viable as more consumers upgrade to smartphones. Domino's Pizza credits mobile for 8% of the company's sales, and Maloney told eMarketer that around 30% of all orders come through digital channels.

And as to the efficacy of app vs. web, Glass of OLO, which provides mobile ordering platforms for restaurants like Cold Stone Creamery, Fatburger and Five Guys, explained that clients received about 10 times the orders via mobile app than those placed via web.

According to Five Guys project manager Steve Teller, the impetus to embark on online and mobile ordering was to alleviate operational issues, especially during peak traffic periods. Large phone orders were causing staff to spend too much time inputting data into point of sale terminals at the expense of holding up in-store customers. Now orders go straight from the consumer's device to the kitchen, freeing up cashiers to better address walk-in customers.

Five Guys currently gets about twice as many online orders as mobile ones, but mobile orders are 20% larger than call-in and 25% to 30% larger than in-store. The reason for this is that there's a prompt to add things like fries or beverages in the mobile app. Even though order takers are trained on upsells, the app eliminates human error or rushing through ordering processes during busy periods.

Because Five Guys' menu is small, every option is included in the app, but Teller cautioned those with more offerings against getting overcomplicated. "You may want to go with 80% of what you do to ensure a tight customer experience in your mobile strategy, rather than trying to do it all and losing everybody because you muddied the waters a bit," he said.

Skipping the line is the primary incentive for Five Guys mobile users (the burger chain doesn't discount) and the app has also succeeded as a branding tool. "The people that download the apps are now carrying around something that is Five Guys on their phones," said Teller. "And for a company that isn't going to do a national ad campaign or a big radio deal, that's important to us."

Mobile Payments: Wave (and Pay) of the Future?

Paying with the wave of a phone is still mostly a fantasy in the US. Experts have predicted this convenience coming to fruition for some time, but due to differing standards, competing products—Isis, Google Wallet, Apple Passbook, Square, to name a few—and the expense of adapting point of sale systems, the future is not quite now.

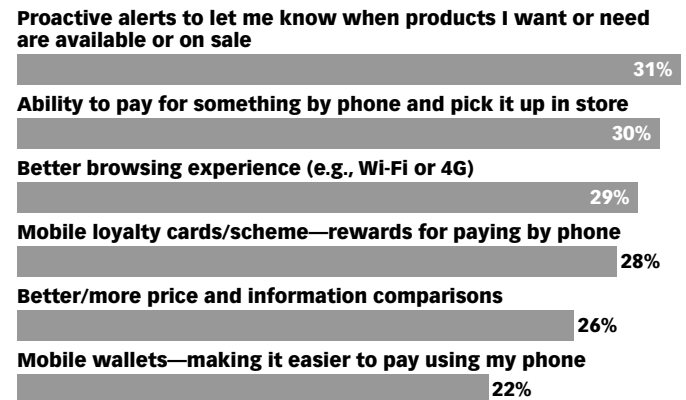
Change is happening, though. eMarketer forecasts there will be 7.9 million proximity mobile payment users in 2012, equal to 7% of all smartphone users, a 189% increase over 2011 that's set to grow to 13.3 million by 2013.

Of the half of consumers who could see a benefit to mobile wallets in a March 2012 survey by Catapult, convenience led the way. For 28%, there was the expectation that coupons would be tied to mobile payments, making paying and saving seamless.

Twenty-eight percent of mcommerce users surveyed by IAB in May 2012 also liked the multipurpose potential of mobile and cited rewards as an incentive for paying by phone. Twenty-two percent wanted mobile wallets simply to make paying by phone easier.

Features that US Mcommerce Users* Would Like to Access in the Future, May 2012

% of mcommerce users



Note: n=260; *smartphone and feature phone owners only
Source: Interactive Advertising Bureau (IAB), "The IAB Mobile Phone Shopping Diaries" conducted by On Device Research, May 17, 2012

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Marketer adoption of mobile payments has been sluggish. Enabling the integration of coupons, loyalty and payments was low on the list of mobile marketing features among those surveyed by Chief Marketer in May 2012. As of then, just 19% had done it.

To learn more about how mobile payments are evolving, check out the October 2012 eMarketer report, "[The State of Mobile Payments, 2012: A Global Assessment and US Market Forecast.](#)"

Q&A: What Is the Future of Mobile Payments?

Whether it's the expense of investment, confusion over future standards or uncertainty about what consumers want, it's fairly clear that there is a lack of consensus on mobile payments. eMarketer asked the opinions of experts in the fast food industry.

Robert Notte

Chief Technology Officer

Jamba Juice

"I don't think there will be one standard for some time, if ever. I think each technology solution brings certain advantages—and even some disadvantages—over the others. I think the consumer will dictate what technology they'll use, because there are multiple technologies available."

Steve Teller

Project Manager

Five Guys Burgers and Fries

"We're looking at supporting digital wallets, whether it's our wallet or any of the other versions, like Google or PayPal or Square... We're not concerned with who the customer has selected as their digital wallet, we just want to be open and accept—and that's what we're researching right now—the best technology in order to be as open as possible."

BJ Emerson

Vice President, Technology

Tasti D-Lite

"Until widespread adoption or some platform emerges, I really don't have a compelling reason to go in and start really doing it. There's just a whole lot more risk when you start talking about payments than with things like mobile and couponing. When you start doing payments, you'd better know what you're doing, and you'd better have a platform to support it. And it's something that, if you're going to invest some money in, needs to be adopted by customers. So I think a lot of people are holding back at this point and saying, 'OK, is Apple Passbook going to emerge? Is Google Wallet going to emerge? Is Isis going to emerge as the frontrunner?'"

Denise Lee Yohn

President and Consulting Partner

Denise Lee Yohn Inc.

"There are a lot of things that have to happen when you introduce new technology into a larger system. There are franchise owners who need to be willing to buy and accept the new technology that you're introducing. You've got different regions, so you need to make sure your technology works in different places, in different ways.... You've just got

a lot of considerations that can make deploying technology in general a lot more difficult for a larger chain. Now, certainly [larger chains] have the deeper pockets, and they can actually work with technology suppliers to develop systems that make it easier for them to adopt. But, generally speaking, I think the smaller chains can take something like Apple Passbook, which is more of an off-the-shelf kind of program and be able to implement it very quickly."

David Wachs

Senior Vice President, Mobile

Cellit

"I think mobile payments are still a few years away. There hasn't been the incentive to move to a mobile payment method by the consumer as much as the mobile payment industry would like. However, mobile wallets for everything else other than mobile payments—and that's loyalty cards, coupons, ticket—that market is starting to really take off, especially with Passbook. There are tremendous features within Passbook that make it a lot easier for a brand to maintain that relationship and get their coupons redeemed."

Conclusions

Mobile and fast food are a natural fit. Because both were born out of a demand for convenience and cater to users seeking immediacy, they make sense together—more so than for many other industries.

The potential audience for mobile tools is broader than what stereotypes would indicate. Rural dwellers may not have many options for ordering sushi via smartphones, and it's not exactly commonplace to see seniors having barcodes scanned for free pancakes, but fast food diners who value saving time and money are more than just the young men, or even the moms and millennials, that are on all marketers' radar.

The convergence of mobile coupons, loyalty and payments will change the fast food industry. Until recently, all of those pieces have been fractured, making it difficult for restaurant operators to track usage and finely target marketing. Though still a new concept for customers, mobile wallets have the potential to increase visits and loyalty.

eMarketer Interviews

Tasti D-Lite Captures Loyalty with a Soft Touch



BJ Emerson
Vice President, Technology

Tasti D-Lite

Interview conducted on October 17, 2012

CMO One-to-One: Auntie Anne's Recipe for Mobile Is Better Targeting



Heather Neary
Chief Marketing Officer

Auntie Anne's

Interview conducted on October 12, 2012

Jamba Juice Embraces Diverse Approaches to Mobile Payments



Robert Notte
Chief Technology Officer

Jamba Juice Co.

Interview conducted on August 20, 2012

Five Guys Burgers Features Menu Apps and Mobile Wallet

Steve Teller
Project Manager

Five Guys Burgers and Fries

Interview conducted on October 18, 2012



Dennis Maloney
Vice President of Multimedia Marketing

Domino's Pizza

Interview conducted on October 29, 2012



David Wachs
Senior Vice President, Mobile

Cellit

Interview conducted on October 15, 2012

Rohan Chandran
Executive Director of Consumer Products

YP

Interview conducted on October 19, 2012

Paul Coletta
Chief Marketing Officer

The Melt

Interview conducted on October 22, 2012

Noah Glass

Founder and CEO

OLO

Interview conducted on October 4, 2012

Rich Hope

Chief Marketing Officer

Jersey Mike's Subs

Interview conducted on October 29, 2012

Denise Lee Yohn

President and Consulting Partner

Denise Lee Yohn Inc.

Interview conducted on October 8, 2012

Related eMarketer Reports

[The State of Mobile Payments, 2012: A Global Assessment and US Market Forecast](#)

[US Online and Mobile Coupon User Forecast](#)

Related Links

[National Restaurant Association](#)

[The NPD Group](#)

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[Prosper Mobile Insights](#)

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