

CTR eTail 2014

STATE OF EMAIL MARKETING IN RETAIL ONLINE IN INDIA



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Introduction

From new technologies to mobile devices, the ways in which consumers engage with emails continues to evolve. This year has witnessed the development of several new strategies and solutions that have advanced the email channel, like introduction of tabbed inbox and display of email images by default via caching in Gmail and the integration and merger of Hotmail IDs with the new Outlook mail. Email is among the most trusted and profitable marketing channels today - often cited ahead of display media, banner ads, and brand websites. At its core, email is an interactive channel and drives consumer purchases more than any other marketing channel.

In 2013, more promotional email campaigns were being consumed on mobile devices than on desktop platforms, yet many marketers continued to run campaigns based on traditional practices (rich graphics EDMs or mailers optimized for desktop viewing and mouse clicks). According to Adobe's Digital Publishing Report: Retail Apps & Buying Habits (2013), 79% of smartphone users use their devices for reading emails on the go, a higher percentage than those who used it for making calls. Additionally, ExactTarget's 2011 study 'Mobile Dependence' says that just over one-half of U.S. consumers who made at least one purchase using their smartphone have done so because of a marketing email accessed via a mobile device. This shows that marketers should quickly get on board with mobile friendly communication, as the stats clearly reflect that consumers are influenced more by the communication they receive via their smartphones.

The 'Forrester Research Email Marketing Forecast, 2011 to 2016', talks about how the amount spent on email marketing in the United States will increase by just shy of \$1 billion by 2016. It also mentions how more and more companies are including email in their overall marketing strategy, giving them a possible competitive edge over those who haven't heeded this trend.

Finally, for 2014 we forecast that there will be a substantial increase in migration of SMS alerts to Email Transactional alerts. We also anticipate Email Marketing Programmatic execution (Cart Abandonment, Re-Engagement, Welcome and Partner Promotions etc.) to gather momentum as there is a direct measurable impact on customer loyalty and campaign ROIs.

Top 10 Key Findings & Research Highlights

1. Customer Acquisition remains the top choice as the primary marketing goal for eTailers in India with 46% of the respondents choosing this option over Customer Retention and Brand Awareness.
2. Email marketing stands out as the primary online marketing activity for eTail marketers at 31%, followed by Social Media Marketing and Search Marketing at 23% and Websites at 19% respectively.
3. Email Campaigns & Social Media updates corner a massive 77% of the votes and continue to dominate the mind of marketers in India when it comes to effectiveness in engaging with customers.
4. 46% of the respondents shared that a quarter to half of all their email marketing messages will be viewed on mobile devices in 2014. A further 42% was even more confident and chose the 50% to 75% option for the same. 8% of the marketers were still more cautious and said that less than 25% of all email marketing messages will be viewed on mobile devices in 2014.
5. 35% of the eTail marketers surveyed said that they would increase their e-Marketing budgets between 11% to 20% in 2014 while a slightly lower number (at 23%) said that they would increase the same by between 21% to 50%. 15% of the survey respondents are looking to increase their budget by over 51% while 11% of marketers are looking at a minimum increase in budget (less than 5%).
6. 27% of the eTail marketers have allocated upto 75% of their marketing budgets towards online marketing activities. At the same time, a slightly smaller group (at 15%) has allocated even more to take it up to 50% of the total marketing budget being ear marked for online activities. 19% of the eTail marketers surveyed have assigned less than 10% of their total marketing budget towards online marketing in 2013 - 14.
7. From the 85 eTailing websites analysed we found out that about 61% of them are following an easy Sign-up process to attract more new subscribers. Meanwhile 19% of the eTailing websites are following medium Sign-up process and 20% have a lengthy Sign-up process.
8. 12% eTailers out of the 85% eTailing websites analysed have adopted the Double Opt-in process and the rest 88% are still using the Single Opt-in process.
9. A good 42% of eTail marketers are sending out Programmatic emails. This clearly showcases that marketers have begun to realize its importance and are now more concerned about the shift in the marketplace.
10. Shopping cart abandonment is an issue that is giving nightmares to all eTailing websites owners, but only 27% of the marketers have adopted the cart abandonment program and the rest 73% are still lacking.

These finding indicate that eTail marketers mark about half of their marketing budget towards Online marketing activities, which includes email, mobile and search marketing. However, email marketing is still more successful as compared to other marketing channels. Also, Programmatic marketing is gaining momentum, where marketers are looking towards creating more personalised communications, re-engaging existing customers and trying to find solutions to cart abandonment issues.

So, let's walk you through the research in detail!

Research Methodology

The research for this report was conducted in 3 ways:

a) A survey was run between September 2013 to November 2013 and was circulated widely in the marketing community in India (via online links and offline form). The report saw an enthusiastic and active participation of eTail marketers who shared their valuable insights and feedback.

b) We also did mystery shopping on almost 85 eTailing websites between December 2013 and January 2014 to gather more valuable insights.

c) Reporting metrics were also analysed for the 500 million + emails that go through the Octane platform per month.

Our primary objective was to gather data about the use of email marketing in eTail in India. Therefore from the analysis of the data collected from the survey, you can get insights about the following:

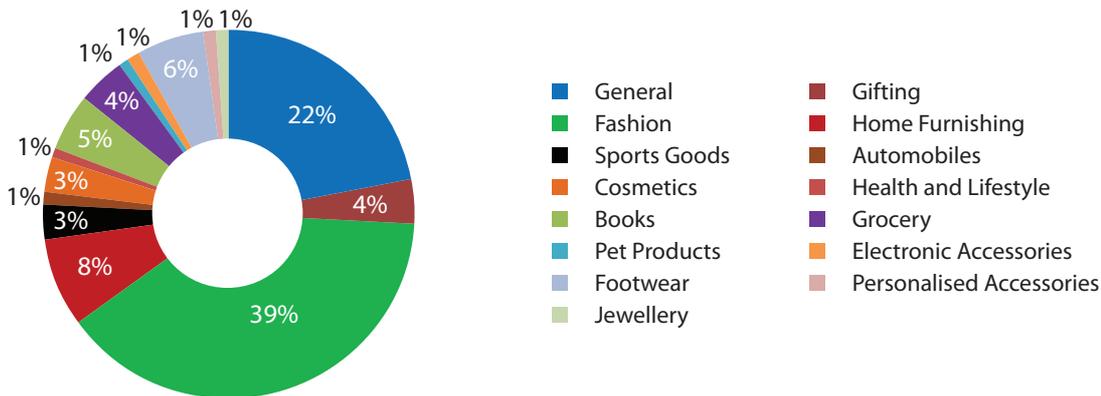
- Primary goal of eTailing companies in India
- Primary online marketing activity in 2013
- Maximum customer engagement
- Re-engagement program
- Personalisation of emails
- Cart abandonment programs
- Responsive design mailers
- Sign-up process
- Opt-in process
- Frequency of sending emails
- Email marketing on mobile devices in 2014

We sincerely hope that these insights equip you with a unique understanding of the eTail marketing domain in the country and enable you to make informed decisions about your own marketing campaigns.

Research Participants and Profile

For this report, we wanted to cover a diverse range of categories to get the complete view of email marketing in eTail in India. This was essential because we wanted the research to represent all opinions as accurately as possible.

Some of the categories that we covered during the research (and their percentage) are mentioned below:



Select companies that participated the research:

20dresses.com	Foodesto.com	Nykaa.com
Allshoolstuff.com	Futurebazaar.com	Oyegirl.com
Amazon.in	Giftease.com	Pepperfry.com
Americanswan.com	Gkboptical.com	Perfume2order.com
Amkette.com	Grabmore.in	Perniaqureshi.com
Babyoye.com	Hidesign.com	Purple.com
Bata.in	Homeshop18.com	Seventymm.com
Bedbathmore.com	Indiamart.com	Shop.inonit.com
Bestylish.com	Indiangiftsportal.com	Shopatplaces.com
Bigbasket.com	Infibeam.com	Shopclues.com
Bluestone.com	Inkfruit.com	Shoppersstop.com
Crossword.in	Ivorytag.com	Snapdeal.com
Dailyobjects.com	Jabong.com	Sports365.in
Dogspot.in	Junglee.com	Thelabelcorp.com
Donebynone.com	Koovs.com	Tradus.com
Ebay.in	Ladyblush.com	Trendin.com
eZoneonline.in	Landmarkonthenet.com	Urbandazzle.com
Faballey.com	Lenskart.com	Urbanladder.com
Fabfurnish.com	Libertyshoesonline.com	Utsavfashion.in
Fabulloso.com	Limeroad.com	Vistaprint.com
Fashionandyou.com	Metroshoes.net	Yebhi.com
Fashionara.com	Myntra.com	Yepme.com
Fashionbynine.com	Mysportcart.com	Zansaar.com
Firstcry.com	Naaptol.com	Zopnow.com
Flipkart.com	Naturalmantra.com	Zovi.com

Email Marketing In India: Market Size 2013

2013 has been yet another defining year for the growth of online users in India. While Mobile Internet has already overtaken broadband access, it accelerated with over 130 million users in December 2013 against a user base of 110 million users in October 2013¹. Overall the number of internet users in India is estimated to be around 200 million and is growing at a double digit rate.

So it is no surprise that online commerce in India is also growing at a very aggressive pace. According to a report², India's e-Commerce market grew at a staggering 88% in 2013 to \$16 billion, riding on booming online retail while defying slower economic growth and spiraling inflation. The same survey estimates the country's e-Commerce market to reach \$56 billion by 2023, driven by online retail.

Even smartphone mobile shipments in India grew at a fast pace. By some estimates³, India's smartphone shipments makes it the 3rd largest smartphone market in the world, right behind the US and China, ahead of Japan, the UK etc. Smartphone vendors shipped a total of 12.8 million smartphones in India in Q3, 2013, resulting in a whopping 229% year-over-year growth from the same period last year when 3.8 million smartphones were shipped.

All of this has been positive news for online consumption in India and on the back of this, email marketing has prospered. Once seen as a poor cousin of SMS (or text) marketing or a cheap alternative for spamming, 2013 has been the year of reckoning for the email marketing channel in India.

In addition to the rising volume of email marketing in India, there has been a greater emphasis on quality of email marketing programs by brands to connect with the consumers. Industry estimates for India Email Marketing peg, promotional campaign volumes at 25-30 bn- email messages annually in 2013. The exact volume of transactional emails in India is difficult to ascertain (because of the unorganized nature of these communications); still it is nowhere near the volumes of SMS transactional alerts which are estimated to be ~45-50 bn messages every year. The continued uncertainty around the SMS channel because of the regulatory environment has meant that India marketers are shifting to email channel for alerts, notifications and other transactional messages.

Engaging through Email Marketing in 2013 across Industries

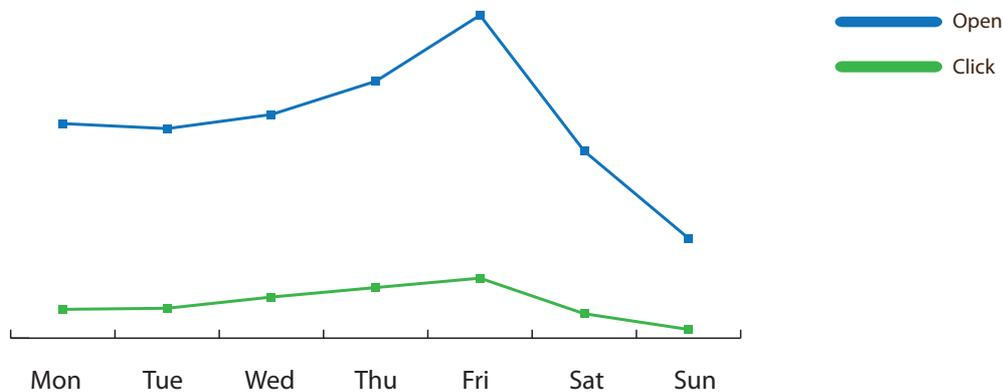
In 2013, we saw a dramatic shift in how the email marketing channel is utilized by marketers in India. This 'State of email marketing report', the first of its kind, reviews over 6.5 bn promotional emails sent in India over 2013. We have seen the volumes grow, but more importantly, the market has shifted from cheap CPM rates to a focused approach on how to use the power of engagement through email marketing programs.

We have seen an increased awareness for Opt-in email marketing amongst India marketers and a reduction in requests for buying or renting email subscribers list. Though spam rates have come down, they still form the majority of bulk email in India.

Additionally, the number of email users in India go up along the lines of growth of online users in the country as discussed in the last section. Interestingly, Yahoo has recovered market share for email usage in India and has emerged from 16% of all promotional email recipients in April 2013 to 23% share in November 2013. We have seen the dominance of Gmail subscribers reduce from 75% of promotional email volumes in April 2013 to around 50% in November 2013. This can be largely attributed to the success of the Yahoo's campaign around revitalizing its dormant email subscribers in India. Volume percentage share for Corporate and other email IDs (other than Gmail, Hotmail, Yahoo and Rediffmail) has grown almost 4 times during the year (from 5% in April 2013 to 19% in November 2013). We have seen a dip in performance of campaigns targeting Google Mailboxes with the arrival of promotional tabs in Q2 2013.

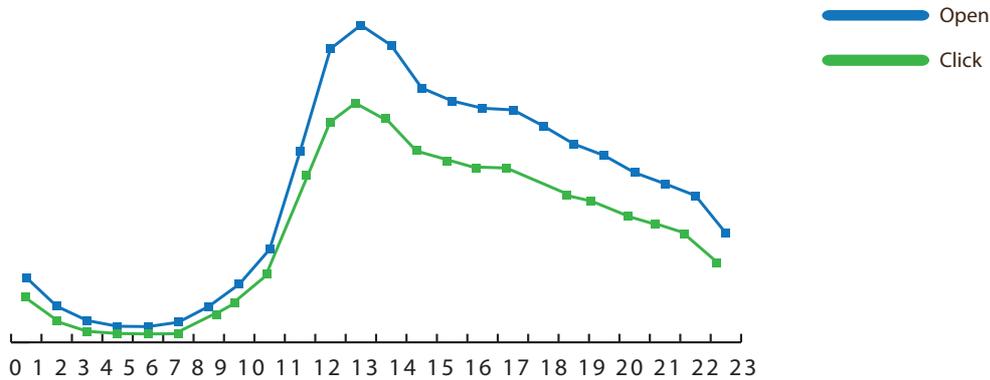
Engagement Rate: Best Hour & Best Day

Online usage in India declines on the weekends and the email engagement rates mirror that. Open Rates and Click Rates are the highest between Thursday and Friday. In subsequent sections, we will see how this varies by different industry verticals.



Best Engagement Rate: Opens & Clicks by Best Day of the Week

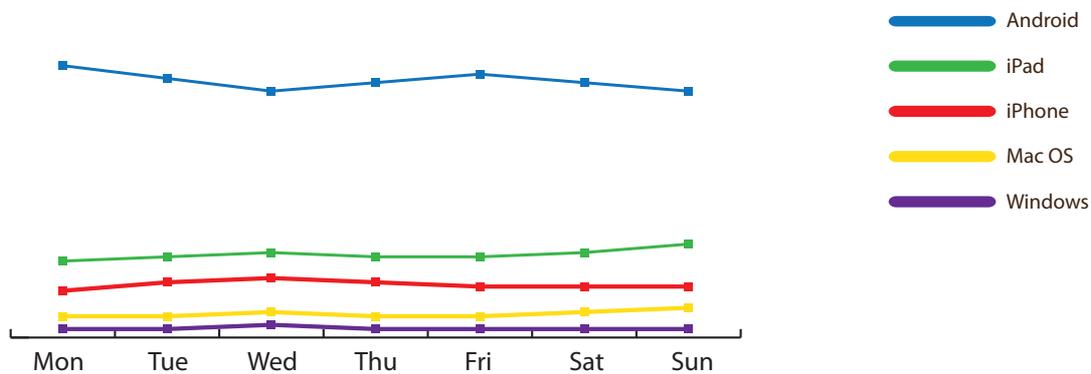
Click and Open Rates for Email Marketing Campaigns in India are best achieved between 10am and 1pm on weekdays.



Best Engagement Rate: Opens & Clicks by Best Hour of the Day

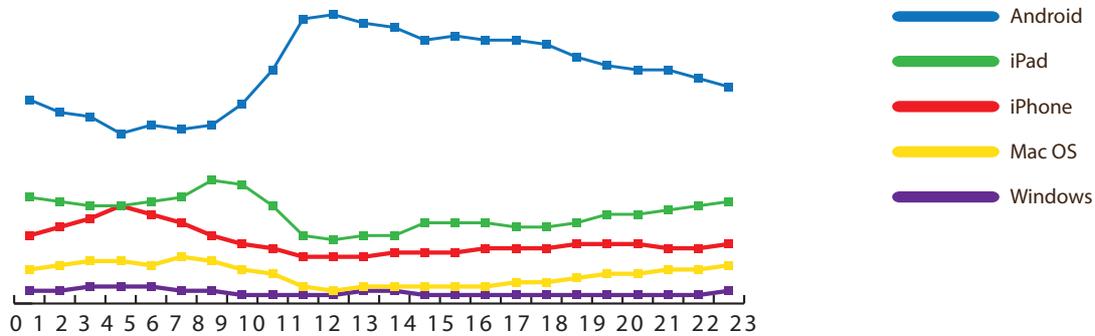
Engagement Rates: Best Hour & Best Day by Devices/OS

We have seen an increased proliferation of various types of devices and OS in India over the last 12 months. Let's now see how this impacts the engagement rates for promotional email campaigns (Open Rates). Open Rates by Devices/OS across any day of the week stay fairly consistent with Windows based devices (PCs, laptops), that lead in engagement. We see a rise in Open percentage share by Android devices on weekends (Saturday and Sunday) which are on expected lines.



Best Engagement Rate: Opens by OS/Devices Across the Days of The Week

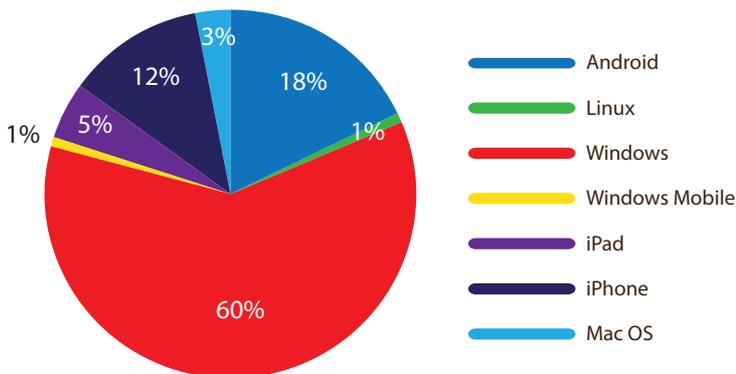
We see a surge in the usage of mobile platforms like Android and iOS (iPhone & iPad) in the morning hours, till 10am. The maximum increase in Open Rate percentage share of email was seen on the Windows platform. This can be attributed to the fact that many online users are active during their work day on the desktops and laptops.



Best Engagement Rate: Opens by OS/Devices Across the Hours of The Day

Most Active Devices/OS: 2013 Open Rate % Share

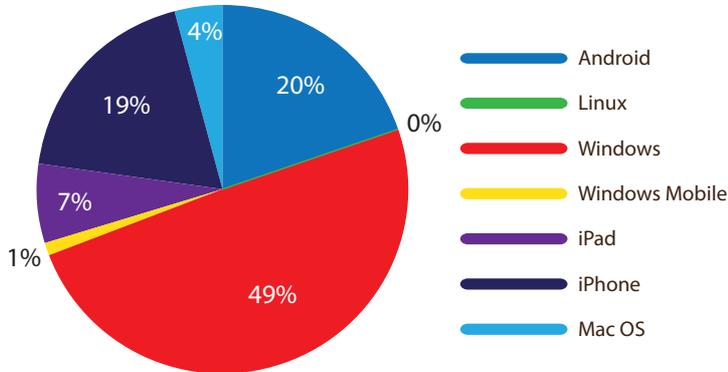
2013 has seen an increased proliferation of devices in India and the online users have been active on a plethora of such platforms. Though Windows continues to lead the market share as a preferred platform to engage on email, we have seen an increase in mobile platforms like Android and iOS for online access and email engagement.



Best Engagement Rate: 2013 Open Rate % Share by Devices/OS type

Most Active Devices/OS: November 2013 Open Rate % Share

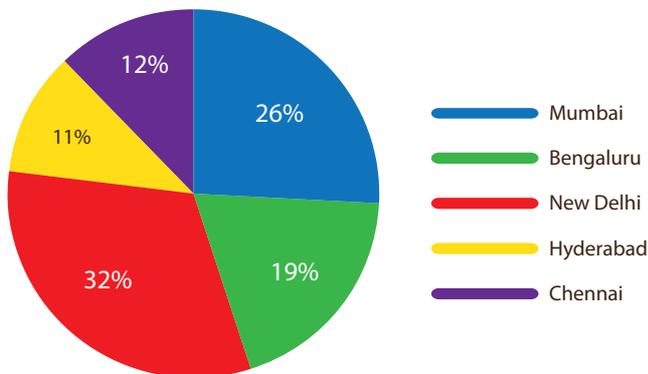
When we look at trending across the years, we found that mobile platforms like Android and iOS have gained a high momentum amongst online users in India with increase in the Open Rate percentage share putting pressure on the Windows Open Rate percentage. Between April 2013 and October 2013, we have seen a 100% jump in Open Rate percentage share of iPhone devices and a 52% increase in Open Rate percentage share for Android devices.



Best Engagement Rate: NOV 2013 Open Rate % Share by Device/OS type

Which City is the most active: 2013 Open Rate % Share

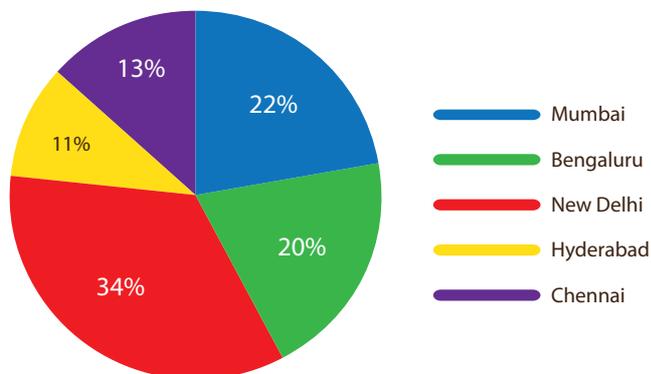
While Tier 2 cities have grown in promotional email campaign volumes, the larger growth in email marketing is being led by the Top 5 metro areas. When we further breakdown the email volumes amongst these Top 5 cities, we see that New Delhi lead in terms of email activity followed closely by Mumbai.



Best Engagement Rate: 2013 Open Rate % Share by Top 5 Cities in India

Which City is the most active: November 2013 Open Rate % Share

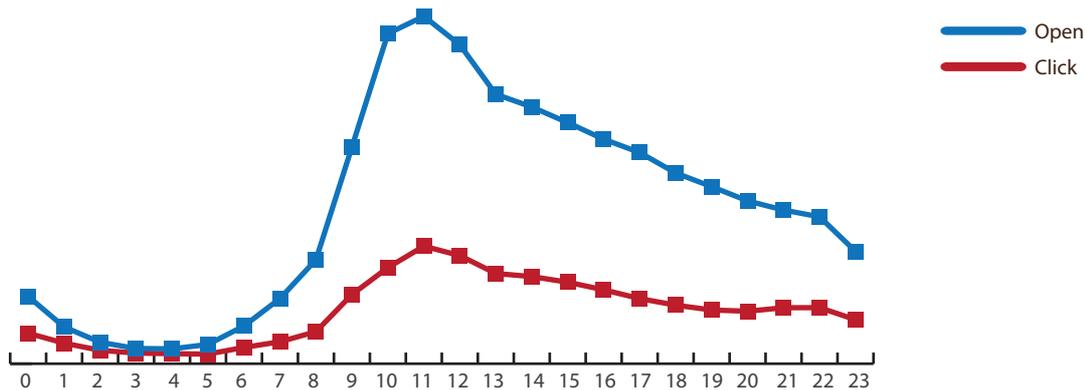
November data shows that while Delhi leads the Open Rate percentage share of all email volumes, Mumbai email users are getting more active on engaging through promotional email marketing campaigns than earlier in the year.



Best Engagement Rate: Nov 2013 Open Rate % Share by Top 5 Cities in India

Retail Email Marketing 2013

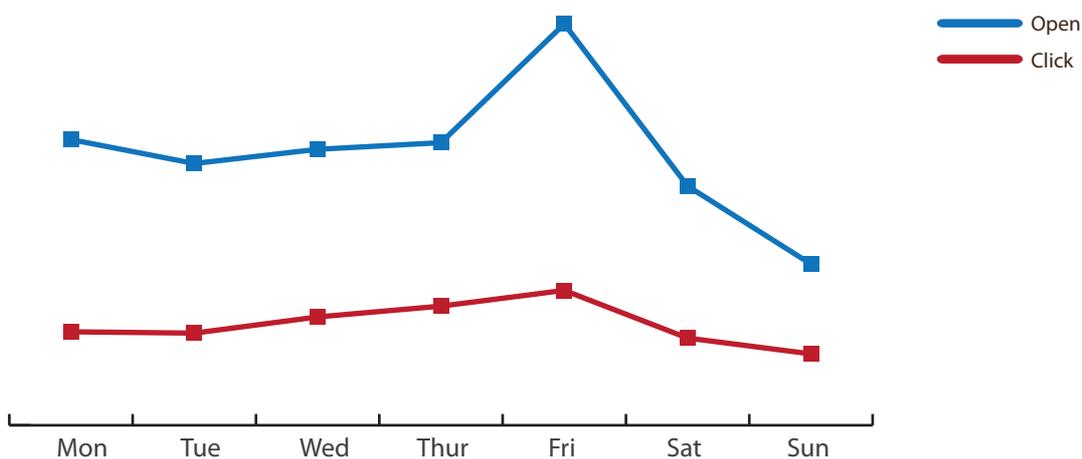
There is no surprise that Retail continues to be the dominating industry sector in India in 2013 when it comes to leveraging the power of email marketing. Be it in terms of total volumes of promotional email marketing campaigns, or Open Rate percentage share or CTR percentage share, Retail marketers have really pushed the limits of email marketing channel to create revenue impact and brand engagement with consumers in 2013 (with a sharp increase from July 2013 till October 2013). In qualitative terms as well, say like social integration with email marketing, Retail companies have led the charge.



Retail Email Marketing 2013: Best Hour of The Day

Retail Email Marketing: 2013 Best Day of the Week

Friday emerges as the best day of the week, with 10am-12pm being the best hours of the day for the best performing email marketing campaigns for the Indian Retail Sector in 2013.

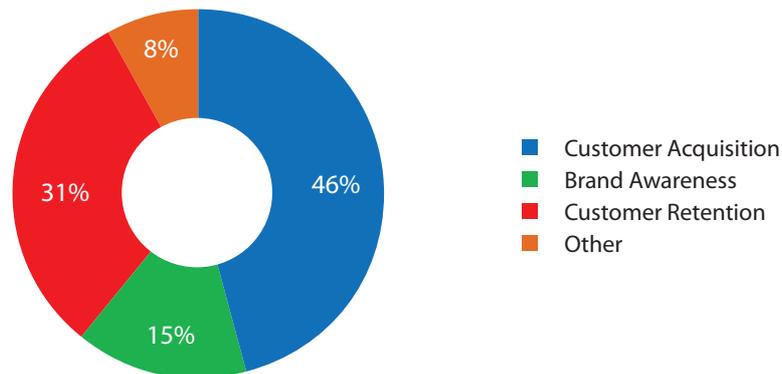


Retail Email Marketing 2013: Best Day of The Week

Marketers' view of Email Marketing Programs in eTail

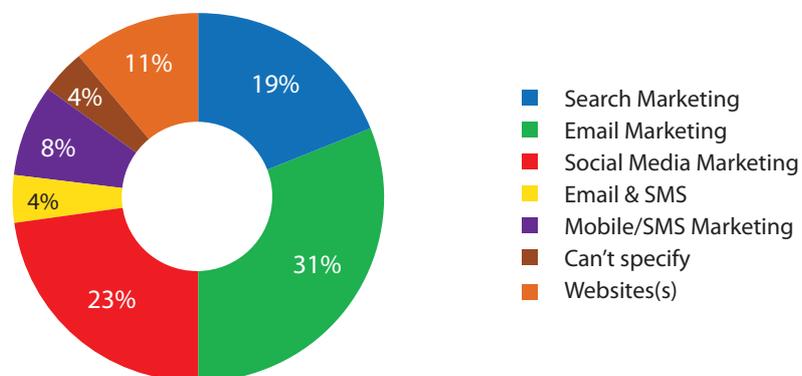
1. Primary marketing goal in 2014

Customer Acquisition remains the top choice as the primary marketing goal for eTailers in India with 46% of the respondents choosing this option. In the line with the trends seen previously, Customer Retention once again stands second in line with 31% of the votes and Brand Awareness comes in at third with 15% of the eTailers choosing this option.



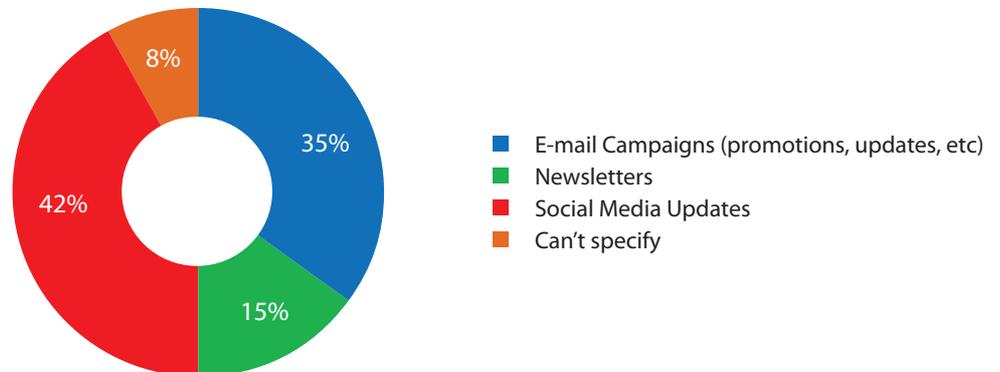
2. Primary online marketing activity in 2013

In 2013, email marketing at 31%, stands out as the primary online marketing activity. Social Media Marketing stands second with Facebook and Twitter leading the charge and making their ad platforms more effective and analytics more robust. Email and Social are followed by Search Marketing at 19% and Websites at 11%.



3. Maximum Customer Engagement:

Email Campaigns & Social Media updates continue to dominate the mind of marketers in India when it comes to effectiveness in engaging with customers. Together, they corner a massive 77% of the votes. 15% of the eTailers shared that their Newsletters result in maximum Customer Engagement.

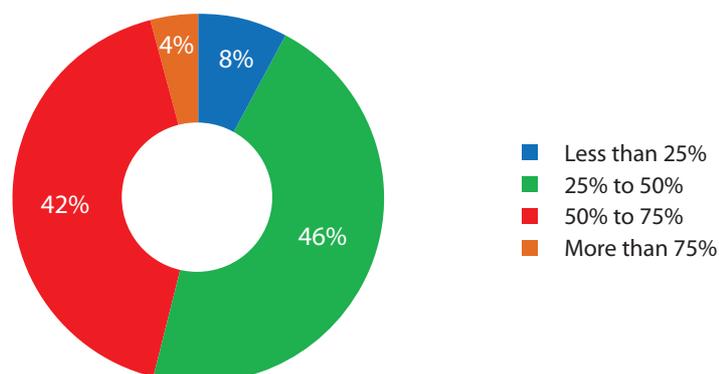


4. Email Marketing on mobile devices in 2014:

Smartphone mobile shipments in India grew at a fast pace. By some estimates³, India's smartphone shipments makes it the 3rd largest smartphone market in the world, right behind the US and China, ahead of Japan, the UK etc.

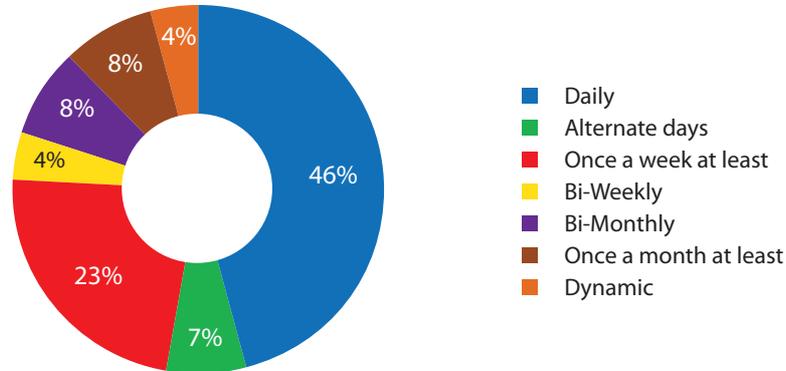
Keeping in mind the rising proliferation of smartphones, tablets and email on the go, marketers are thinking about the spread of this medium. Almost half of the respondents (at 46%) shared that they think between 25% to 50% of all Email Marketing messages will be viewed on mobile devices in 2014. A further 42% was even more confident and chose the 50% to 75% option for the same.

8% of the marketers were still more cautious and said that less than 25% of all Email Marketing messages will be viewed on mobile devices in 2014.



5. Frequency of sending Emails:

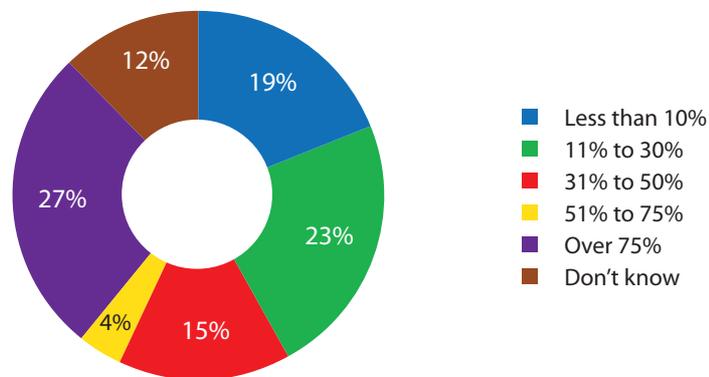
46% of the marketers surveyed revealed that they send Email campaigns on a daily basis, while 23% of the marketers do it at-least once a week. 29% of the survey respondents are less frequent with 8% sending bi-monthly campaigns and 7% sending on alternate days.



6. Percentage of budget allocated to Online Marketing FY 2013 -14:

eTail marketers have allocated up to 30% of their marketing budgets towards Online Marketing activities. At the same time, a slightly smaller group (at 15%) has allocated even more to take it up to 50% of the total marketing budget being ear marked for online activities.

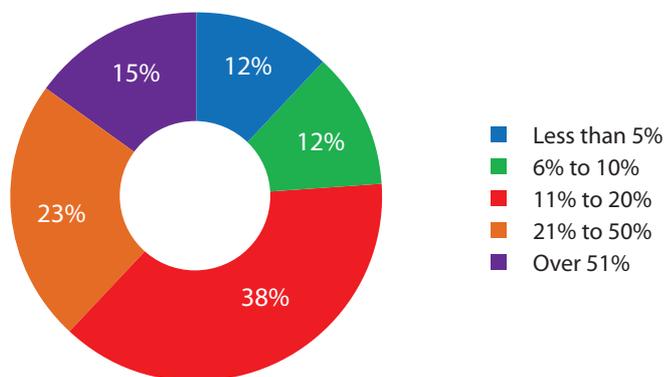
Remarkably, 27% of the companies surveyed have assigned over 75% of their total marketing budget towards Online Marketing in 2013-14.



7. Plan to Increase Budget for e-Marketing in 2014

When it comes to sustained growth of e-Marketing in 2014, 38% of the eTail marketers surveyed said that they would increase their e-Marketing budgets between 11% to 20% in 2014 while a slightly lower number (at 23%) said that they would increase the same between 21% to 50%.

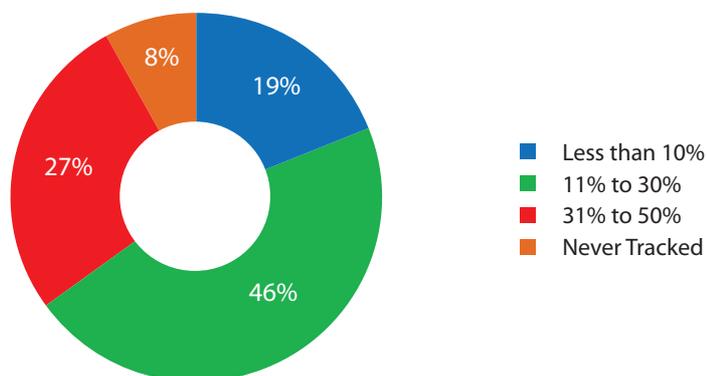
15% of the survey respondents are looking to increase their budget by over 51% while 12% of marketers are looking at a minimum increase in budget (less than 5%).



8. Contribution of e-Marketing to the overall sales revenue

In our survey, 46% of the marketers said that currently, e-Marketing generates 11% to 30% of their total sales revenue; while 27% of eTail marketers voted for 31% to 50%. Meanwhile 19% of the respondents shared that it contributes less than 10%.

Only 8% of the survey respondents shared that they don't track e-Marketing's contribution to the sales revenue in their current marketing agenda.



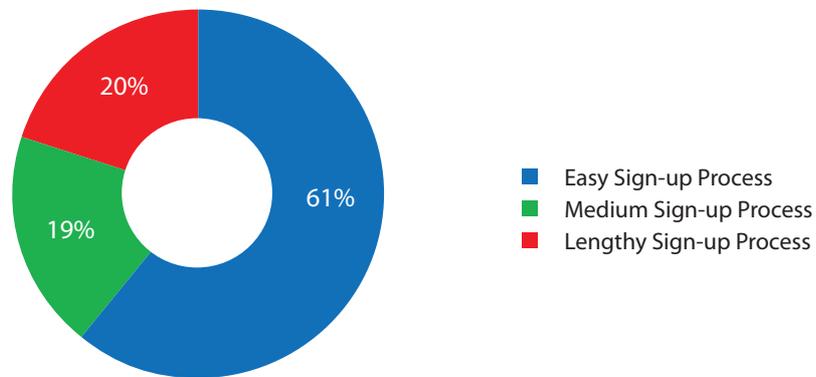
Consumers' view of Email Marketing Programs in eTail:

1. Welcome Program

1.1 Sign-up Process

People usually decide quickly whether they like a website or not, that's why you should grab their interest in a matter of seconds upon their entry to the site. The Sign-up process used by the website should be easy and it should be less time consuming for the customer to create their account instead of following a lengthy process because by seeing the lengthy process customer may change their mind and may move to a competitor's website.

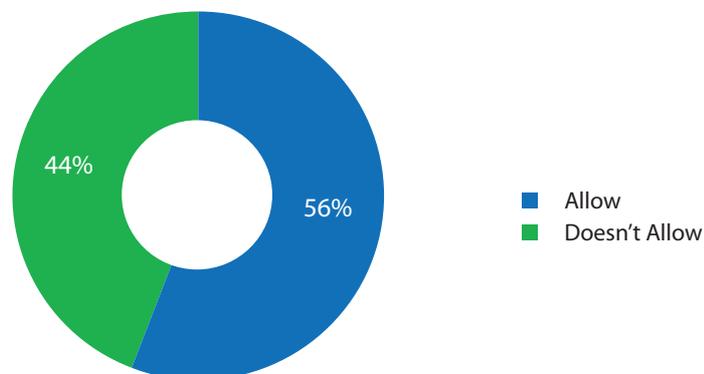
From the 85 eTailing websites analysed we found out that about 61% of them follow an easy Sign-up process (email id, name and password) to attract more new subscribers. Meanwhile 19% of the eTailing websites follow a medium Sign-up process (name, email id, phone no, password and D.O.B.) and 20% have a lengthy Sign-up process (name, email id, password, address, city, pin code, country, D.O.B.).



1.2 Sign-up through Facebook

Using Facebook credentials for registering and logging in to websites makes life easy for today's impatient and password-overloaded users. Social login offers benefits to both a business and customers.

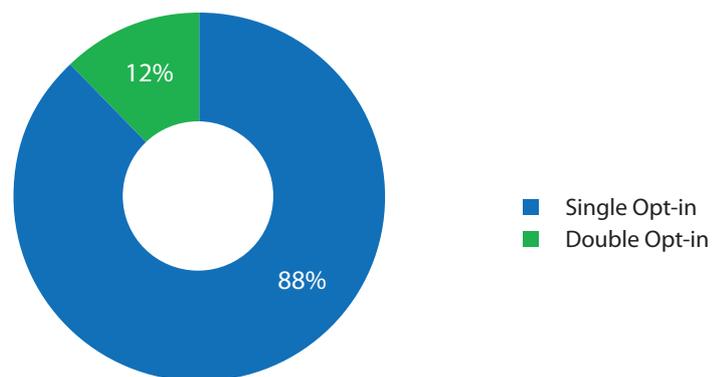
Only a modest 14% of European and a measly 6% of US e-Commerce sites are using it. According to our research, in India 56% of the eTailing websites allow its customer to login through Facebook.



1.3 Single Opt-in/Double Opt-in Process

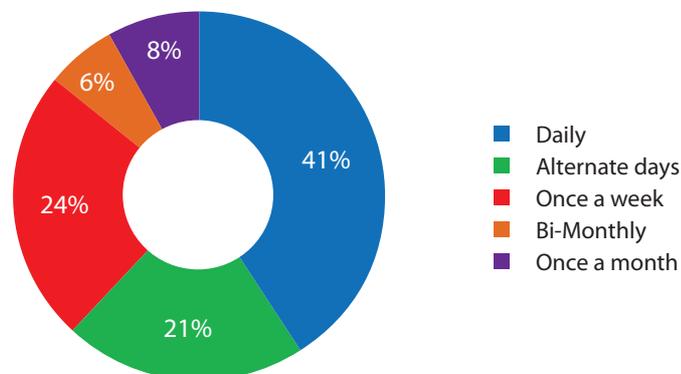
With Single Opt-in process your list will grow faster. However, the quality of the list is diminished, making it difficult to value metrics such as open rates, engagement levels and inbox delivery rate. Comparing these metrics to the Double Opt-in process, you will find that the later ensures that people are entering their information correctly, which equals a cleaner list and lowers bounce rates. So, marketers should adopt the Double Opt-in process to get a good amount of interactive leads.

Our research shows that only 12% of eTail marketers have adopted the Double Opt-in process and the rest 88% haven't.



2. Frequency of Email Campaigns

41% of the eTail marketers surveyed revealed that they send Email Campaigns on a daily basis, while 24% of the marketers do it at-least once a week. 21% of the survey respondents send Email Campaigns on alternate days, with 8% sending it once a month and 6% sending on a bi-monthly basis.

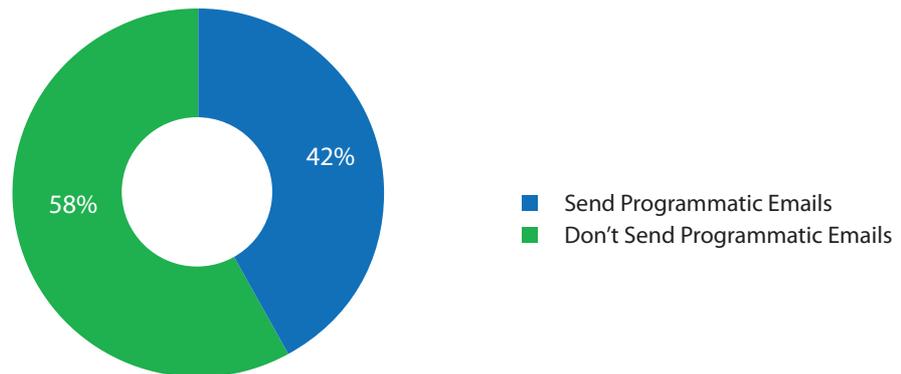


3. Programmatic Engagement

Obtaining someone's email address is a great privilege, but getting that person to open an email can be a difficult task. Therefore, most marketers have customer engagement listed as one of their top priorities.

The concepts of engagement have been in place for many years, but only recently marketers have begun to realize its importance and are now more concerned about the true fundamental shift in the marketplace. Ultimately, the goal of engagement in marketing is to create relationships that benefit customers as much as the marketers themselves.

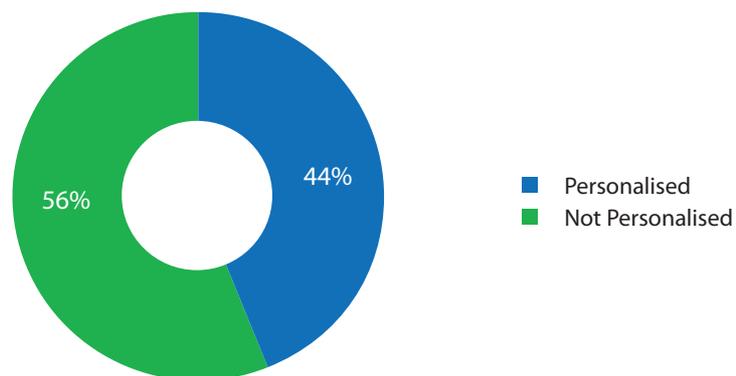
Out of 85 of the eTailing websites analysed, 42% are sending programmatic emails.



3.1. Personalisation of Emails

Personalisation is the process of creating a uniquely tailored shopping experience for each shopper. Consumers today expect tools that help them to find what they seek quickly to complete their shopping agenda. Personalisation offers retailers the opportunity to engage with consumers on a deeper level, keeping them onsite to complete transactions instead of jumping to a competitor's site. According to our report⁴ 'Increased personalisation and more accurate targeting' is the top choice for 72% of the marketers.'

Therefore, personalisation as a strategic initiative cannot just only drive additional revenue, but also sustain customer engagement and loyalty for an increasingly demanding multichannel consumer. Our research shows that almost 44% of the eTailers are using personalisation on emails.

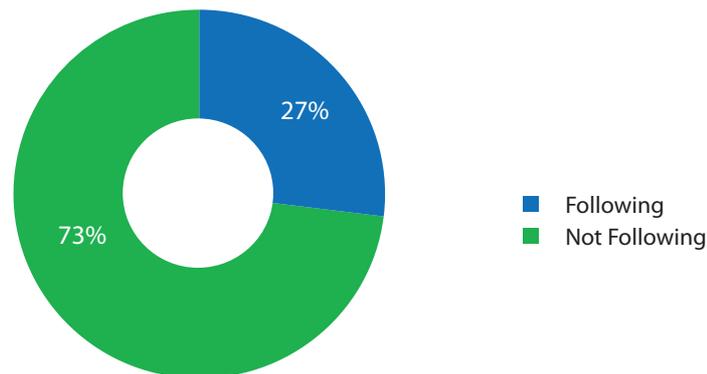


3.2. Cart Abandonment Program

Shopping cart abandonment is an important issue for all eTailers; when the customer comes to the website, explores it, likes the products and puts product in the cart, however eventually the customer doesn't buy anything!

According to the 'Salecycle' report⁵, almost half of all cart recovery emails are opened and over a third of clicks lead to a purchase back on the website. So, if you have been facing shopping cart abandonment lately, it's important for you to take action on it right away, to take your online store towards higher levels of success.

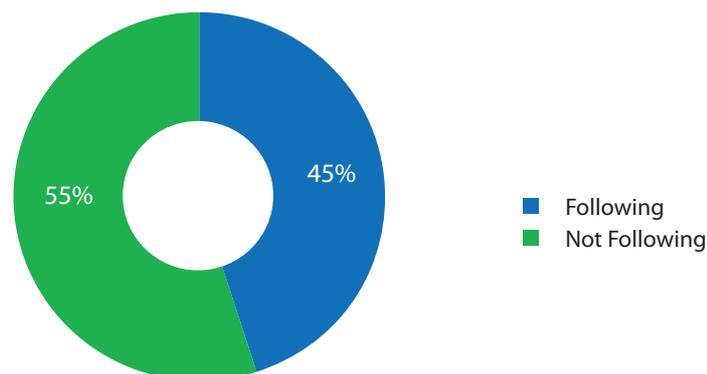
Our research shows that only 27% of the marketers have implemented the cart abandonment program and the rest 73% are yet to adopt it.



3.3. Re-engagement Programs

Communicating with your customers through strategically designed and artfully executed email plans is a key component for any eTailer looking to build a lasting relationship with customers. It's a delicate path to tread, but it's also an extremely powerful tool for making sure your customers stay informed and are aware of your brand when making their considerations. Targeting your customers individually to re-engage them with your site makes them feel special.

According to our research only 45% of the eTailers are focussing on re-engagement programs and the rest 55% are not.



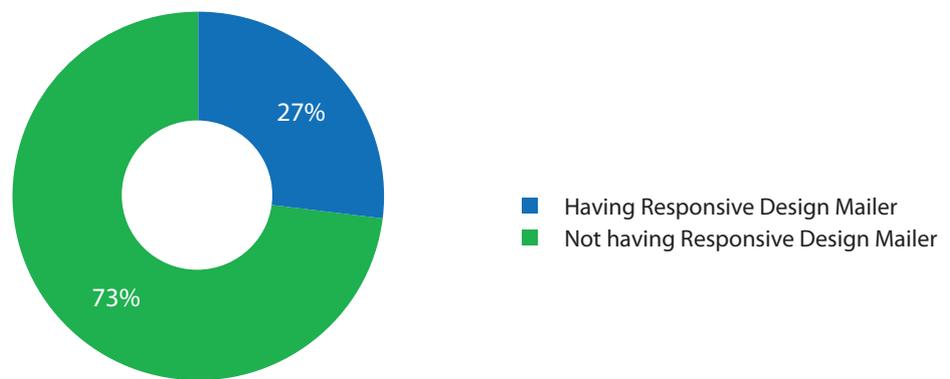
4. Responsive Design Mailer

The numbers speak for themselves: According to our report⁴ 45% of the marketers surveyed believe mobile devices are an important platform for Customer Engagement and are adapting to it well.

However, if the e-mailer isn't optimized properly for mobile devices (user having to scroll horizontally or vertically), the user may not click through on your emails resulting in low CTR.

Creating a consistently usable experience even beyond the email is crucial to making conversions happen. Whether you're displaying detailed information on your website, or trying to draw your users on the landing page, you have to ensure that the destination is optimized for mobile viewing; taking care of little details, like pasting a coupon code advertised in your email into a web form on a target page, also goes a long way.

Our research shows that 27% marketers use Responsive Design Mailers and the rest 73% are missing out on an important opportunity to raise their CTR percentage rates.

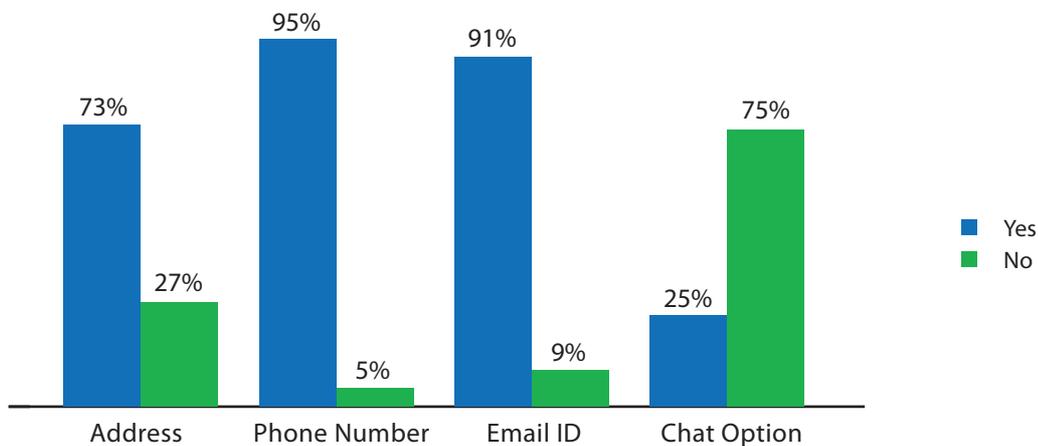


5. Web Form

Out of the 85 eTailing India companies analysed 27% of them do not share physical address on their websites which we believe can help build better consumer trust with your brand.

The presence of a phone number and email ID on your website increases faith among your visitors; as they would have a place or a person to contact when in need. Individually 4% and 8% of eTailers don't have phone numbers and email IDs present on their websites respectively.

The presence of a chat option is gaining popularity, but it still has a long way to go. A chat option helps visitors to solve their queries on the spot, and that can result in a successful transaction. However, only 20% of the eTail websites analysed are following it.



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About Octane Research

Octane Research is the research authority in India on how marketers and consumers are engaging through digital channels like Social Media, Email Marketing, Search, Mobile, SMS and the Web. By analyzing data from hundreds of sources and running into billions of touch points every year in India alone, Octane Research provides rich insights and the context for India marketers towards smart strategic planning, tactical decision-making and business effectiveness for their digital campaigns.

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About Octane Marketing

Octane is India's 1st multi-channel platform for integrated marketing campaigns. Marketers can send integrated multi-channel (Email, SMS and Web) campaigns on a clean spam free marketing platform, built on intelligent software which is available on demand (pay as you go, zero upfront investments, zero lead time to implement) or onsite (deployed behind firewalls). Powerful up-to date software backed by a 24x7 IP reputation management service. 100% Opt-in. 100% Permission Marketing.

For more details, please visit www.octane.in.



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