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May 1, 2012

# The Way it Began

amazon.com.

E-RETAILER



PERSONAL COMPUTERS



AUCTION MARKETPLACE

facebook

SOCIAL NETWORK

Google

SEARCH

may is marketing month 2012

shop.org rama  
www.shop.org/marketing

# The Way It Is



amazon.com.

Google

ebay®

facebook

E-RETAILER

DIGITAL WALLETS

PCS

TABLETS

MP3 PLAYERS

SMART PHONES

MOBILE OS

SOCIAL MEDIA

MOBILE PAY

MARKETPLACE

SEARCH

B-TO-B ETAILER

PUBLISHER

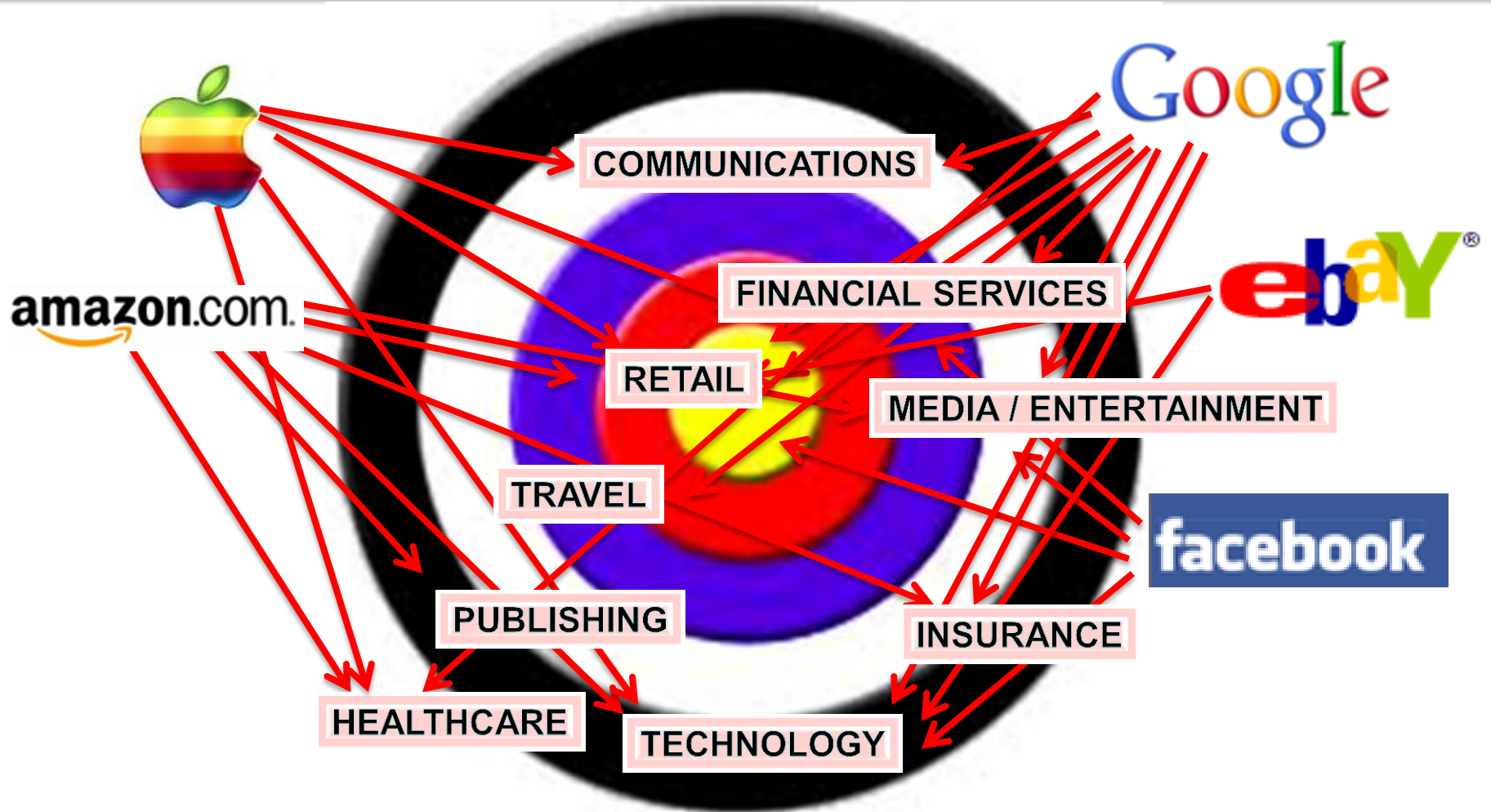
E-COMMERCE PROVIDER

CLOUD SERVICE PROVIDER

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# Taking Aim at Major Industries



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# \$ Power: Titans vs. Top U.S. Retailers

\$ (Billions)					
Market Cap	564B	200B	103.2B	100B*	53.2B
Sales	142.3B	40B	48B	3.6B	12.4
Net Income	38.6B	10.8B	.63B	.98B	3.3B
Cash	28.5B	49.3B	9.6B	4.0 (pre IPO)	5.9B

						
Market Cap	200B	79B	38.5B	38.5B	30.5B	13B
Sales	447B	70.4B	93.4B	69.9B	73.2B	90.4B
Net Income	15.8B	3.9B	1.5B	2.9B	2.6B	.60B
Cash	6.5B	2B	5.8B	.79M	1.1B	.19M

Sales & Net Income: Reported Earnings, Rolling 4 Qtrs; Marketcaps as of 4/26/12

\* Facebook Marketcap is Estimated at IPO May, 2012

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# Amazon

amazon.com.

Retailer	          
Marketplace	
B-to-B Commerce	
Digital Media Store	   
Flash Sales, Local Deals	    
eCommerce, Search, Messaging, Virtual Storage Services	
Publishing	 
E-Readers, Tablets & Smart Phones	  <p>Rumor of 2012 Smart Phone</p>



amazon.com.

Checkout by  
**amazon**  
an Amazon Payments Product

# Apple



iTunes



App Store



iCloud



iStore

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# Ebay



## Marketplaces



FASHION  
Electronics

**Motors**  
Tickets

## Payment / Mobile Wallet



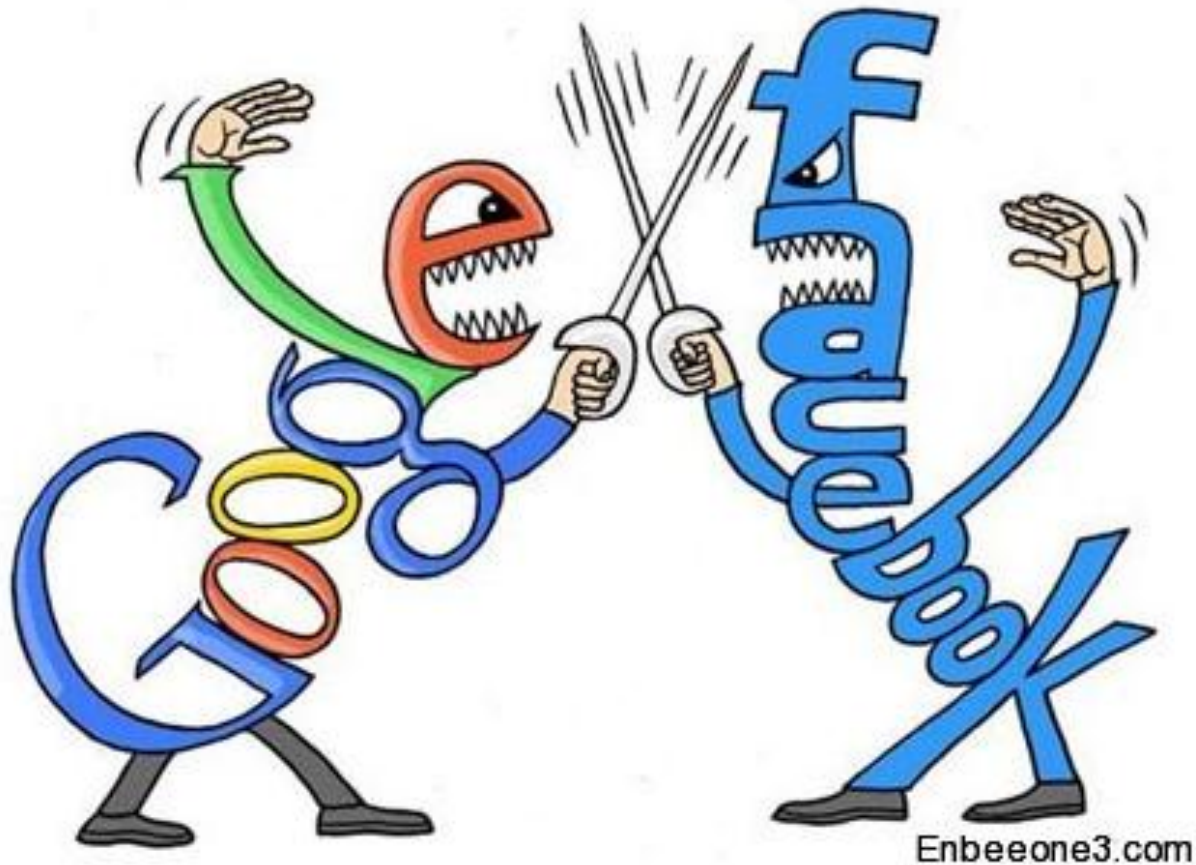
## Multi-Channel Commerce Solution Provider



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# The War for Data / Ad Spend



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# Marketing's New "Face"

facebook

## Growing Tentacles

As Facebook expands its reach and moves into new areas, it's creeping onto the turf of other Internet players, which have to decide whether Facebook is friend, foe or both.

**Apple**  
Apple has competing social network Ping; could become rival in phone software and mobile ads.

**Google**  
Competes for top engineers and online marketing dollars.

**Twitter**  
Twitter competes for user attention and marketing dollars.

**zynga**  
Successful game maker built on Facebook's platform, but must pay 30% fee for use of Facebook Credits

**GROUPON**  
Collective Buying Power  
Partners to simplify user logon, competes in marketing local deals.

**PayPal**  
Partners to fund Facebook Credits for games but could compete in online payments if Credits expands.

**myspace**  
Myspace lets users import their interests from Facebook; competes for user attention and display ad dollars.

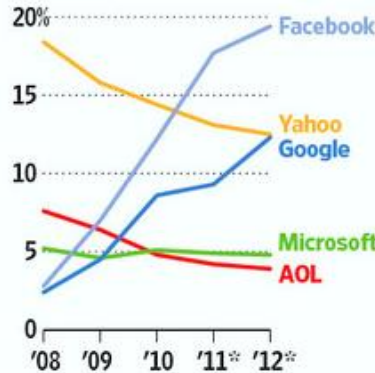
**YAHOO!**  
Partners to bring Facebook content to Yahoo sites; competes for user attention and display ad dollars.

**Share of minutes spent online each month in the U.S.**

Source: comScore

## Diverging Paths

Share of total U.S. display-ad revenues



## VALUATION

in billion U.S. dollars



## Facebook Ad Revenues, 2009-2012

billions



	US	Non-US	Worldwide
% change (2012 vs. 2009)	417%	1,468%	678%

Note: Numbers may not add up to total due to rounding Source: eMarketer, Jan 2011

900M  
Active  
Users



Instagram

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# So Much More than Search...



## Search = Advertising



## Mobile is Key Focus



## Digital Media



## Shopping Too!



## Social



## And so much more...



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# Friend ...and Foe

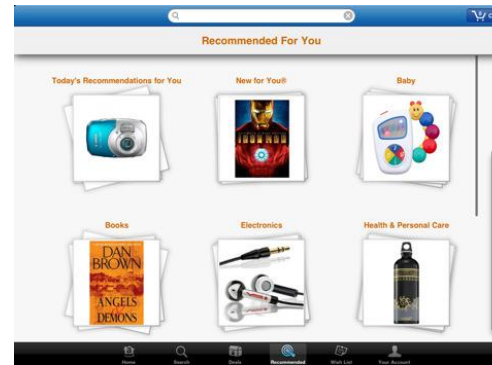


## How You Can Become Successful By Partnering With Amazon

Most people do not become successful on their own there is usually someone who has influenced their idea or strategy. If you have a product to sell, why not stand on the shoulders of those who have gone through the process of retailing before.

I am talking about Amazon. All small and midsize online retailers have faced the challenge of attracting customers and finding an

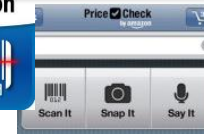
**Amazon puts some retailers into business.... and others out of business...**



**One-click Mobile shopping**



**Price Check**



**First at Linking Customer Profiles to Twitter Addresses**



Welcome! Please follow these steps to get your \$3 credit.

Click the button below and you will:

- Connect your Amazon.com and Twitter accounts. (If you are not already signed in, you will be prompted to do so).
- Automatically follow @amazonvideo. The message "I just got a \$3 credit for Amazon Instant Video for movies and TV shows @amazonvideo. Click <http://amzn.to/HeZid> to get yours. #get3" will be automatically tweeted from your Twitter account.

Tweet and Get \$3

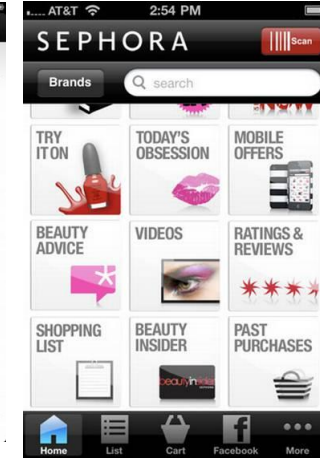
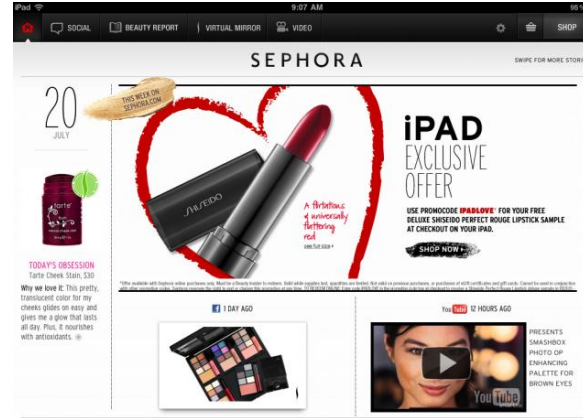
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# Revolutionizing Retail.



iPads in Stores



Engaging i-Apps



Nobody Does In-Store Better than Starbucks!

# Online to Offline Partnerships



**Home Depot  
National Rollout of  
PayPal in Stores**

**Ebay Stores for  
National Brands**

lastcall  
BY NEIMAN MARCUS

Welcome to Last Call by Neiman Marcus

emailsignup

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# Sharing and Shopping



**Sephora**  
3,109,828 likes · 35,258 talking about this

Health/Beauty  
www.sephora.com www.twitter.com/sephora  
www.youtube.com/sephora www.sephora.com/beautytalk  
www.sephora.com/sephorastv

About Photos Fan Fridays Pinterest Give Instant Gift Cards

## Pin-analytics

Sephora 12318 Followers

Sephora's Color Wash Sw... 17 pins

It Lists 47 pins

In Sephora Windows 24 pins

Sephora Hot Now 9 pins

Sephora Videos 29 pins

Trending Now 37 pins

smile. you're designed to

**Fab.com**  
188,372 likes · 2,764 talking about this

Fab.com Timeline Now Highlights

FREE STANDARD SHIPPING ON ALL ORDERS

NEW ARRIVALS CLOTHING SHOES HANDBAGS ACCESSORIES

Home / New Arrivals / Beach Boutique 1 / 113

**logo HALTER BIKINI TOP**  
\$125.00

DESCRIPTION DETAILS & FIT FABRIC & CARE

A classic, our logo halter bikini top is a swim staple. Neutral colors have gold hardware for a dose of easy glamour. Made from luxurious Italian fabric that is silky-soft and ultra-smooth, with two-way stretch for maximum comfort. A supportive style that stays put in the water, pair with its matching logo halter bikini bottom.

Matches with: [Logo Bikini Bottom](#)

Style Number: 11122685

## Shop Zella at Nordstrom!



**Funk Wedges**

Get the latest affordable, figure-flattering activewear from Zella.

## Retail Ads

Create a crazy cool look with these funky wedges. Join Fab.com and save 58% instantly



Fab.com Thursday

Black and white is always in fashion, and a Black and White Cowhide is a modern classic addition to any space. Originating from the pampas grasslands of Brazil, Pure Rugs' hides are individually selected for superior quality, shine and softness. Each premium cowhide is then hand-finished for the perfect look.

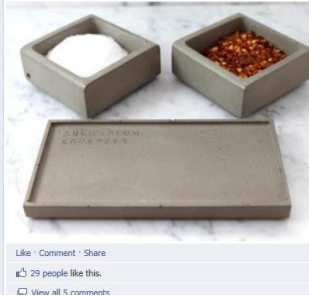
Available today at: <http://fab.com/sale/5398/zuett/?fref=fbwall-puregrugs&fref=Facebook+Wall>



Fab.com Thursday

Concrete isn't foremost in your mind when you think of must-have kitchen accessories, but this collection of coasters, trays and utensil holders will make you reconsider. Designed by the Massachusetts-based business Culinarium, you'll be hard-pressed not to become a convert. Added bonus: it's eco-friendly.

Available today at: <http://fab.com/sale/5396/zuett/?fref=fbwall-culinarium&fref=Facebook+Wall>



## Fab.com Succeeds at Timeline Flash Sales

Like 0 +1 1 Pin it 18

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# Partnering and Learning....



Google women's minimalist running shoes

SWW Log In to the SWW Flores247 BHS Classmate1980 Suggested Sites Business Plan

Any price Up to \$70 \$70 - \$90 Over \$90

\$ to \$ Go

Any brand New Balance Merrell Saucony Brooks Asics

Any gender Women's

Any nearby store REI - Raleigh Foot Locker - Raleigh Nordstrom - Durham Finish Line - Durham Reset tools

Brooks \$90.00 at REI

Saucony \$79.99

Merrell \$110.00

Asics \$59.99

Dresses In stock nearby

Your location: Cary, NC 27511 - Change

Belk® Coupon Deals - Get \$10 Off with \$50 Purchase  
www.belk.com/RealDeal  
Shop Savings Online or In Store.

Little Black Dress | zappos.com  
www.zappos.com/Little-Black-Dress  
zappos.com is rated ★★★★★ 13,416 reviews  
Free Shipping & 365 Day Returns on Little Black Dress

Cocktail & Party Dresses | VictoriasSecret.com  
www.victoriasecret.com/★★★★★ 4,335 seller reviews  
Shop Sexy Cocktail & Party Dresses Victoria's Secret Official Site.  
+ Sexy Dresses - Summer Trend Report - Sexy System Jersey Separates - All Dresses

Antonio Melani \$159.00

Antonio Melani \$159.00

Jones New York \$49.50 at Macy's

Samsung WF210ANW - Washing machine - freestanding - 27" - front loading - 4 cu. ft - 1100 rpm - neat white

\$650 online. \$719 nearby

★★★★★ 326 reviews +1 -3 Recommend this on Google

#1 in Laundry Washers

September 2010 - Samsung - Front-loading - 4 cubic foot - Ener

Back to overview

Nearby stores

Your location: Cary, NC 27511 - Change

Map showing nearby stores:

- Lowe's 2000 Walnut Street, Cary (919) 233-7000 - Open today 7am-10pm \$719.10 In stock
- Lowe's 1920 Northwest Maynard Road, Cary (919) 380-3210 - Open today 7am-10pm \$719.10 Limited stock
- Sears 1105 Walnut Street #600, Cary (919) 380-4300 - Open today 10am-8pm \$719.99 Limited stock
- Best Buy 1105 Walnut Street #1136, Cary (919) 481-1956 - Open today 10am-9pm \$719.99 Out of stock
- Best Buy 237 Crossroads Blvd, Cary (919) 851-1868 - Open today 10am-9pm \$719.99 In stock

## Google Shopping

REI

REI - REI-OUTLET - REI ADVENTURES - STORES & EVENTS - SALE & CLEARANCE

Gear up with Google Offers: \$15 for \$25 at REI - Buy Now

SPECIAL DEAL THROUGH GOOGLE OFFERS:  
**\$15 FOR \$25 TOWARD GEAR AT REI!**

**40% OFF**

As a Gearment subscriber, we want to make sure you know about a great deal available now through Google Offers. Just pay \$15 through Google Offers and get \$25 toward great gear, clothing and more at REI.

Act quickly - deal expires soon and quantities are limited! Limit 1 per person. Get details.

BUY WITH GOOGLE OFFERS

EXCLUSIONS APPLY

\*Exclusionary copy TRD

REI QUICK LINKS

About REI | REI Stewardship | 100% Satisfaction Guarantee | Join the Co-op | REI Member Help | Apply for an REI Visa® | Update Email Preferences

## ENJOY YOUR GOOGLE OFFER AT REI

Congratulations on scooping up the recent Google Offer of \$25 to spend at REI for just \$15. Now it's time to cash in on the deal and go shopping for top-brand gear and clothing. It's easy!

[How to use your Google Offer and full offer details](#)



START YOUR SHOPPING WITH REI STAFF PICKS



Merrell Pace Glove Cross-Training Shoes - Women's  
Price: \$99.95  
★★★★★ 4.4 (79 reviews)



Alite Monarch Butterfly Chair  
Price: \$69.95  
★★★★★ 4.6 (94 reviews)



Marmot PreCip Rain Jacket - Men's  
Price: \$99.00  
★★★★★ 3.8 (36 reviews)

## Google Offers

Google offers

REI

Coming Soon  
\$25 worth of shopping at REI

Pay \$15 for \$25 to spend on everything you need for your outdoor adventures. Subscribe now to get this and other great deals delivered straight to your inbox.

Dakland / East Bay

Subscribe

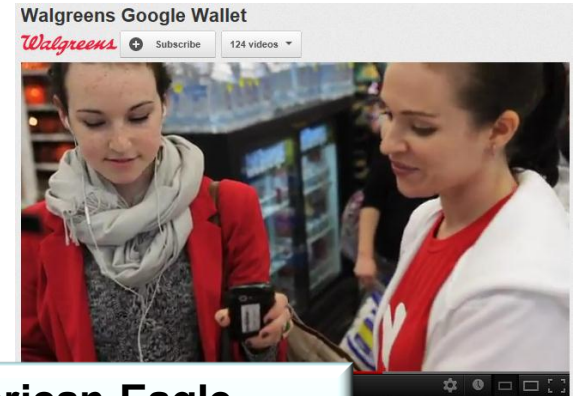
How it works | Get this offer | Terms of Service | Subscribe

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# Retailers Embrace nfc



**Google Wallet Launches with American Eagle, Container Store, Macy's, Subway & Walgreens**



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# Changing Faces...

amazon.com.



ebay®

facebook

Google

Aol

Microsoft

NOKIA

RIM

YAHOO!

ORACLE

SAP

IBM

## Flash Sales



## Social Networks



## Reviews



## GeoLocation



## Group Buying



## Social/Mobile Gaming



## Social Shopping



## Social Fashion



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# Social / Retail Mashup...

**amazon.com.**

livingsocial    woot!

buy·v!p    LOVEFiLM.COM<sup>®</sup>  
Let's watch another one

MYHABIT    shopbop.com

**ebay<sup>®</sup>**

gsi commerce<sup>®</sup>    Magento<sup>™</sup> Open Source eCommerce    hunch

CRITICALpath<sup>®</sup>    RedLaser    ZONG Say it all

BillMeLater<sup>®</sup>    Milo local shopping    where<sup>®</sup> Discover your next favorite place

**Walmart** Save money. Live better.

+

**Kosmix**

=

**@WalmartLabs**

OneRiot socially targeted mobile advertising

socialcalendar

small society

The New 105<sup>th</sup> yihaodian.com

**NORDSTROM**

**HAUTELOOK**

SOLE SOCIETY    BONOBOs  
the chic new address for the shoe obsessed

**TESCO**    BzzAgent<sup>™</sup>

# In Summary...



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