Forrester Consulting
MAKING LEADERS SUCCESSFUL EVERY DAY

September 2009

Appraising Your Investment In Enterprise Web Analytics

A commissioned study conducted by Forrester Consulting on behalf of Google

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Executive Summary

In May of 2009, Google commissioned Forrester Consulting to evaluate the use of Web analytics technologies within US-based enterprise organizations. The goal of this study was to understand current Web analytics technology adoption trends and to identify usage practices within the enterprise.

Enterprises qualifying for participation achieved revenues in excess of $500 million annually and employed more than 1,000 employees. In conducting a Web-based survey of 198 decision makers from these large organizations, Forrester found that enterprises rely heavily on their Web analytics programs to produce information and insight about their online marketing initiatives. However, the strategies, resources, and technology employed for this task are often misaligned with enterprise needs. Thus, many enterprises are currently evaluating their Web analytics programs.

Key Findings

Forrester's study yielded five key findings:

- **Free Web analytics take residence within the enterprise.** A staggering 53% of enterprises surveyed currently use a free technology solution as their primary Web analytics tool, and 71% use free tools in some capacity. This places use of fee-based solutions in the minority, with only 33% of survey respondents paying for Web analytics technologies (12% use homegrown solutions, and 2% use some other option). In addition, it dispels the belief that free solutions are resigned to use in small organizations or somehow diminished in their capacity to provide value to the enterprise.

- **The merits of free are compelling.** Among respondents currently paying for their primary Web analytics tools, 66% would consider displacing them with a free alternative. While the primary driver for this consideration is cost, 60% of enterprises are more likely to consider a free tool now because of recent improvements in free solutions. Additionally, 52% are enticed by free tools because they allow enterprises to invest more in the people necessary to drive insight rather than the technology used to collect and analyze data.

- **Balancing costs and benefits requires introspection.** We found that 52% of practitioners employing both free and fee-based solutions fail to effectively use more than half of the capabilities offered by their tools. This realization is cause for a Web analytics needs assessment to determine if fee-based technologies are justified or simply excessive. For many, spending on Web analytics technologies could be better allocated toward program development and acquisition of expertise.

- **Reliability and ease of use are characteristics that enterprises crave.** For 71% of enterprises surveyed, Web analytics data plays a significant role in driving decisions. So it comes as no surprise that users place a premium on data assurance, with 45% citing reliable data collection as the most important vendor selection criteria. This was followed by 40% who listed an easy-to-use interface and product pricing as the second equally most important vendor selection consideration.

- **Organizations are approaching a point of inflection.** Nearly two-thirds of enterprises would abandon their current Web analytics provider given the right circumstances. While 74% of large enterprises agreed that Web analytics is a technology that they cannot do without, many indicated that alternative tools would suffice. These metrics indicate that

organizations are receptive to change and justifiably seek solutions best suited to meet their needs.

Why Web Analytics Now More Than Ever?

As the Web crests through its second decade of existence, the practice of measuring visitor activity within online properties has become commonplace — so much so that nearly three-quarters of large enterprises consider the Web analytics technologies that enable their organizations to quantify visitor traffic across their sites to be indispensable.

The Forrester US Web Analytics Forecast, 2008 To 2014 revealed that US companies will face significant challenges which that will impede their progress toward analytical excellence.[1] Forrester recognized three omnipresent chasms that organizations must bridge to attain success with Web analytics: the investment chasm, the staffing chasm, and the action chasm. As organizations of all sizes appraise their Web analytics programs, they are increasingly weighing their investments in technologies against their resource allocation with the goal of driving actionable outcomes. For many, adopting free solutions enables them to liberate funding from underutilized tools and apply it to expertise required for generating insight. Forrester found that among enterprises surveyed:
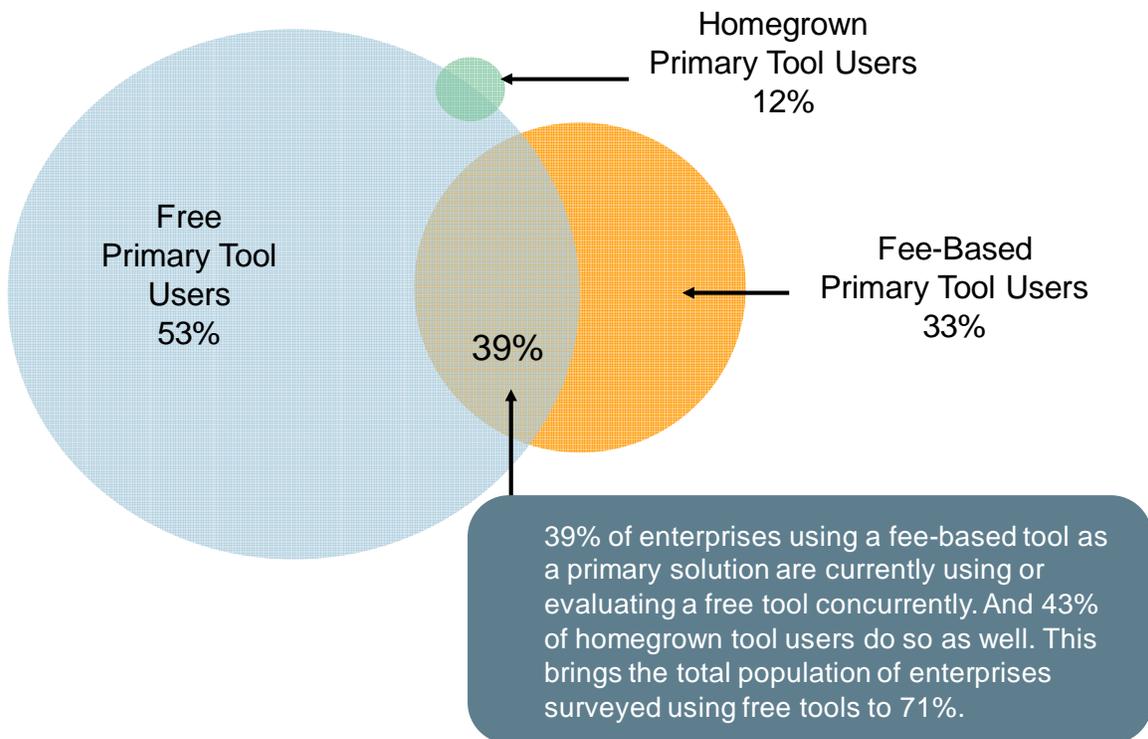
- **The value of Web analytics is undeniable.** Web analytics programs that ascend beyond mere clicks and visits are ones that derive insight from their data. Leading organizations use Web analytics data to achieve greater relevance in automated actions such as dynamically targeted content, and justify budgets based on historic and predictive modeling. Companies that apply Web analytics in this manner obliterate guesswork marketing and develop online programs with the evidence of past performance, projected outcomes, and clear expectations of returns.

- **Insight and action are driven by expert analysts.** Expert analysts comprise the backbone of many enterprise analytics organizations, and these active users drive decisions from their data. Successful organizations leverage their analytical experts to develop and document processes for communication of data. They translate raw data into business objectives and disseminate knowledge throughout multiple levels of their organizations. These expert practitioners transform the data generated by Web analytics tools from metrics and key performance indicators (KPIs) to genuine customer intelligence.

- **Competitive advantage awaits enterprises that commit to Web analytics.** Perhaps the most equalizing component here is the fact that Web analytics tools alone do not differentiate leading organizations from laggards. Forrester's recent Web Analytics Wave™ exposed an extremely tight field of vendors that deliver quality products with immense customization capabilities across a comparable set of features.[2] Through this and other research, Forrester determined that world-class Web analytics organizations are not abundant. Enterprises have an opportunity to achieve competitive advantage by developing their Web analytics strategies and aligning organizational resources now.

Enterprise Analytics Undergoes Metamorphosis

Throughout this study, Forrester tested the hypothesis that large US enterprises are more inclined to use fee-based solutions for their Web analysis needs. We explored this theory using a survey-based methodology that quantified Web analytics usage as well as defined the needs and wants of large enterprises. The results showed that 53% of enterprises employ free Web analytics tools as their primary solutions, and an additional 39% are currently evaluating or using one or more free tools as secondary solutions (see Figure 1). These metrics not only refuted our hypothesis, but revealed that 71% of all enterprises surveyed are using free Web analytics in some capacity.

To further negate our hypothesis, our randomly selected survey sample skewed toward larger corporations, with 45% representing companies with revenues in excess of $5 billion annually and 74% representing companies that had 5,000 employees or more (see Figure 2). Thus, free Web analytics have permeated enterprise-class businesses, and many are reaping the rewards of these services. Forrester found that change is afoot among the enterprises surveyed, evident in numerous aspects of Web analytics program development.

Figure 1: Web Analytics Technologies Employed By Enterprises

Homegrown
Primary Tool Users
12%

Free
Primary Tool
Users
53%

Fee-Based
Primary Tool Users
33%

39%

39% of enterprises using a fee-based tool as a primary solution are currently using or evaluating a free tool concurrently. And 43% of homegrown tool users do so as well. This brings the total population of enterprises surveyed using free tools to 71%.
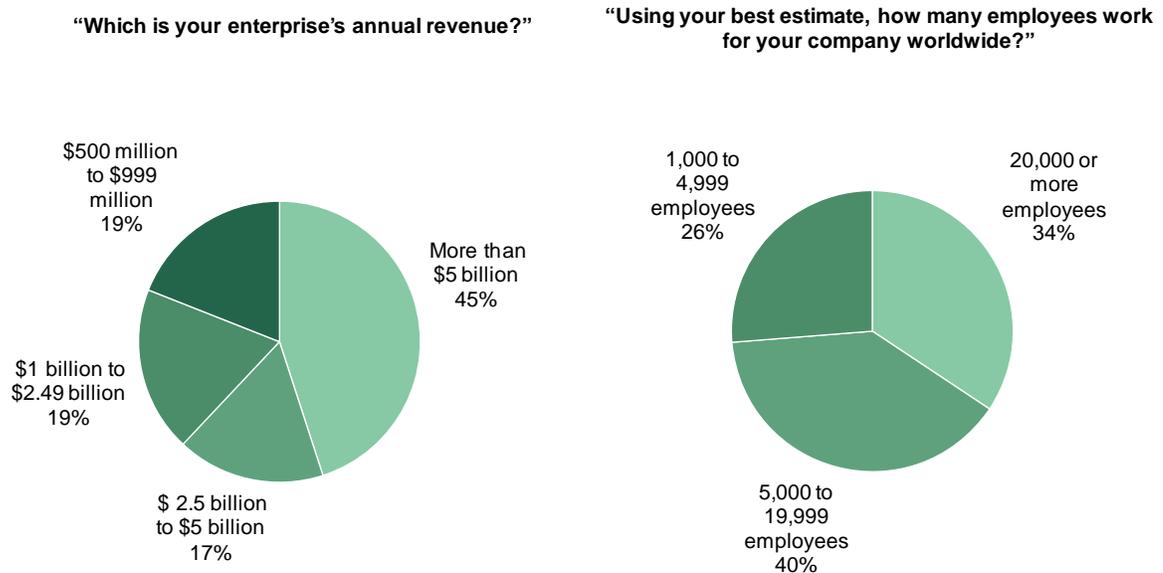
Note: Two percent of respondents listed "other" as their primary Web analytics tool.

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Figure 2: Survey Respondents Hailed From Large Enterprises

<div style="display:flex">

"Which is your enterprise's annual revenue?"

$500 million to $999 million 19%

More than $5 billion 45%

$1 billion to $2.49 billion 19%

$ 2.5 billion to $5 billion 17%

"Using your best estimate, how many employees work for your company worldwide?"

1,000 to 4,999 employees 26%

20,000 or more employees 34%

5,000 to 19,999 employees 40%

</div>

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Strategies Are Being Refined

Although Web analytics technologies have been in existence for nearly 15 years, many large enterprises have only recently recognized the value that they can offer to their organizations. This recognition is sparked by a number of factors, including the growing importance of digital channels, the recognition of accountability that Web analytics technologies can bring to the enterprise, and the strategic benefits of amassing customer intelligence.

Organizations that strive for data-driven decisioning are expanding their perspective on data, which has allowed Web analytics to move from the backroom to the boardroom in many enterprise-class companies. However, this process requires a plan comprised of three critical components: strategy, resources, and technology. Forrester observed that enterprises are constructing their Web analytics strategies with the following principles in mind:

- **Permeation of knowledge is a key strategic element.** Seventy percent of enterprises surveyed believe that their company has a well-defined strategy for Web analytics, which is an essential prerequisite for any program (see Figure 3). Yet, leading organizations recognize that data generated from digital activities must not only be captured, but must also be disseminated strategically throughout the organization. While this often begins with a corporate champion for Web analytics or a C-level sponsor, leading programs kindle evangelists within their ranks who provide the support and vision for data-driven success. This culture propagates the democratization of data, meaning that information is accessible to all and employed in multiple levels and functions across the enterprise organization.

- **Dedicated resources are mandatory.** Sixty percent of decision-makers agree that investments in Web analytics people are more valuable than investments in Web analytics technology (see Figure 3). This sentiment reflects a market that appreciates experts in the field of Web analytics who are more likely to have an impact on moving their organizations forward than the technologies from which they derive their insights. As such, many enterprises surveyed acknowledge that given finite resources for Web analytics, their money is better spent on acquiring the human resources necessary for generating insights.

- **Technology selection is based on specific business requirements.** According to survey respondents, their companies are actively using or evaluating 2.1 Web analytics solutions. This indicates that companies are still engrossed with finding a vendor or combination of vendors that offer a balance of the right technology requirements without excessive non-essential components. Savvy enterprises recognize that the technologies can facilitate the analytical process, yet companies must first align on organizational goals and measurement requirements. This understanding enables enterprises to effectively select technologies that meet their needs and derive maximum value from these solutions.

Figure 3: Web Analytics Technology Is Essential, Yet People Are The Asset

"To what extent do you agree or disagree with the following statements?"

Statement	Strongly agree	Agree	Disagree	Strongly disagree
My company recognizes Web analytics as a technology that we cannot do without	17%	58%	21%	4%
Web analytics plays a significant role in driving decisions at my company	12%	59%	26%	4%
My company has a well-defined Web analytics strategy	13%	57%	23%	8%
Investments in Web analytics people are more valuable than investments in Web analytics technology	9%	51%	37%	3%

■ Strongly agree   ■ Agree   ■ Disagree   ■ Strongly disagree

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009
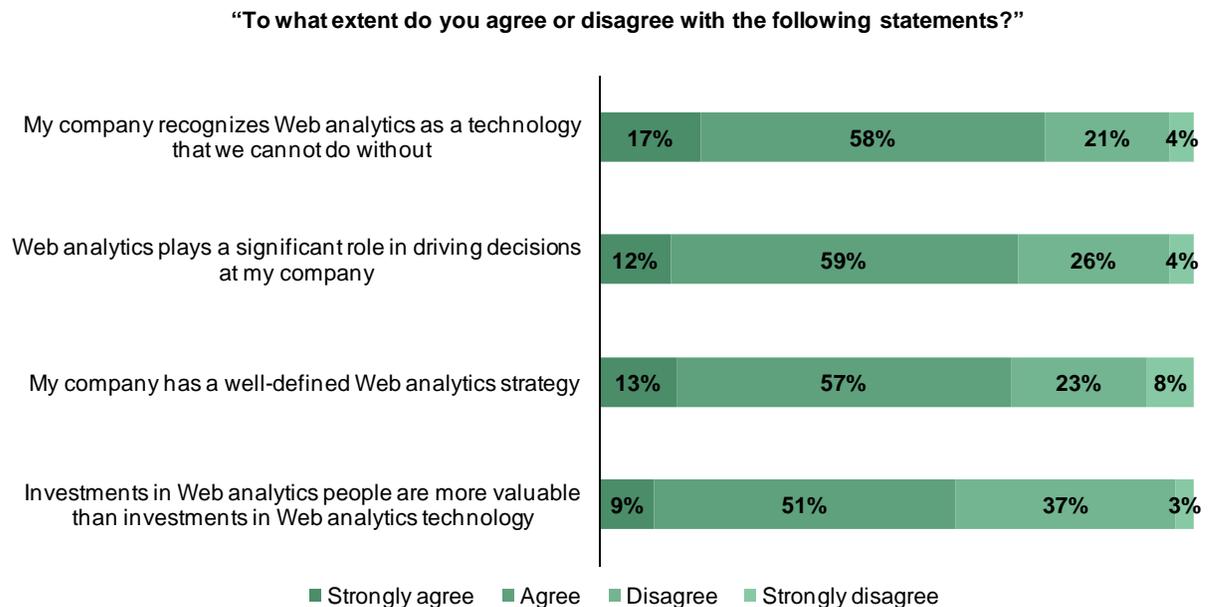
Attitudes Toward Technology Are Shifting

Among enterprises surveyed, 65% would consider switching vendors if they could find adequate capabilities in another solution (see Figure 4). This indicates that loyalty toward Web analytics vendors is tenuous and that many enterprises are discontent with aspects of their incumbent solutions. The primary factors that would entice these enterprises to switch vendors are lower cost (69%) and tools that are easier to use (46%). This data, coupled with other findings from our survey, indicates that:

- **Free is not a four-letter word.** Despite their prevalence in the market, free solutions are sometimes viewed with prejudice, and we found that 34% of respondents stated that they would not consider a free Web analytics tool as their primary solution. However, these individuals are in the minority. For the balance of decision-makers primarily using a fee-based tool, 60% are now considering the switch to a free tool because current solutions have improved, and 55% cite the economy as a driving factor forcing them to reconsider (see Figure 5).

- **Premium tools are not priceless.** Individuals surveyed for this report found fault with all technologies in question, yet the biggest complaint from 29% of respondents who use fee-based solutions was a need for simplified pricing. Conversely, the most-liked vendor features included usability (59% overall), custom reporting (47% overall), and data security (40% overall) (see Figure 6). While it's no surprise that free tools are well liked because of their usability, the fact that users of such solutions appreciate the data security and application reliability more than their fee-based counterparts is noteworthy.

- **Adoption of free tools is dominating.** Without question, free Web analytics tools have made an indelible impact on the marketing landscape. Yet, despite extremely high use of free tools, their tenure on average is two years within the enterprise. Both homegrown solutions and fee-based tools have an average use tenure nearing three years. This indicates that over the past 24 months there has been a surge of adoption among enterprises using free tools. In fact, 30% of enterprises surveyed have been using free tools as their primary solutions for one year or less, indicating a shift in attitude toward free capabilities in recent months.

Figure 4: Likelihood And Reasons For Considering A Vendor Switch

"If you could find adequate capabilities offered by another vendor, would you consider switching to a different Web analytics provider?"

"Given comparable capabilities, which of the following reasons would entice you to switch vendors?"

No, we would not consider switching vendors 35%

Yes, we would consider switching vendors 65%

Reason	Percentage
Lower cost	69%
Easier to use	46%
Better service/support	39%
New features being rolled out	33%
More opportunity to grow with my business	32%
Easier to derive insight	31%
More marketer friendly	24%
Other	2%

Base: 198 Enterprise Web analytics users

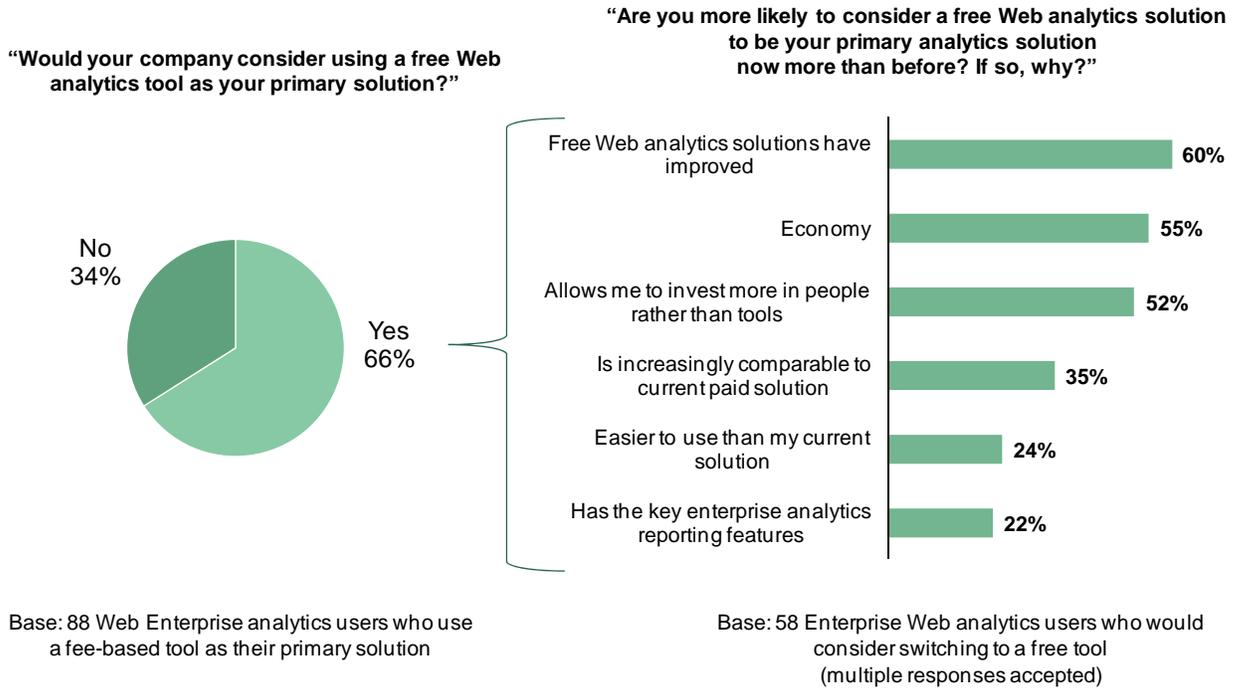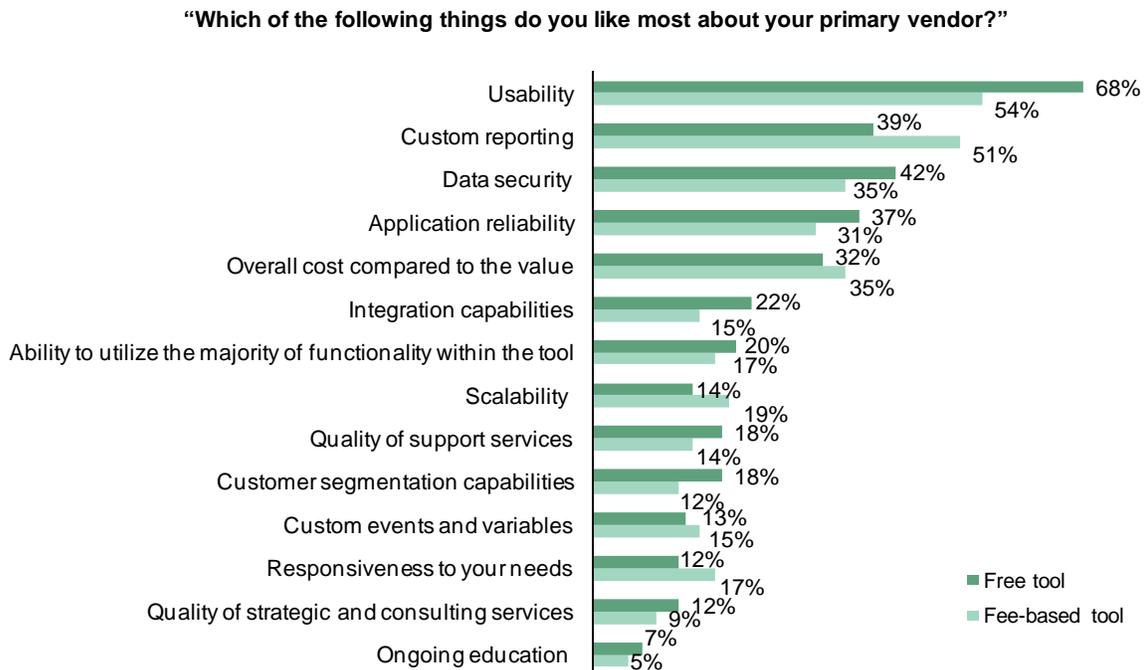Base: 128 Enterprise Web analytics users who would consider switching vendors (multiple responses accepted)

Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Figure 5: Free Tools Become More Appealing

"Would your company consider using a free Web analytics tool as your primary solution?"

"Are you more likely to consider a free Web analytics solution to be your primary analytics solution now more than before? If so, why?"

No 34%

Yes 66%

Free Web analytics solutions have improved	**60%**
Economy	**55%**
Allows me to invest more in people rather than tools	**52%**
Is increasingly comparable to current paid solution	**35%**
Easier to use than my current solution	**24%**
Has the key enterprise analytics reporting features	**22%**

Base: 88 Web Enterprise analytics users who use a fee-based tool as their primary solution

Base: 58 Enterprise Web analytics users who would consider switching to a free tool (multiple responses accepted)

Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Figure 6: Most-Liked Vendor Attributes

"Which of the following things do you like most about your primary vendor?"

Attribute	Free tool	Fee-based tool
Usability	68%	54%
Custom reporting	39%	51%
Data security	42%	35%
Application reliability	37%	31%
Overall cost compared to the value	32%	35%
Integration capabilities	22%	15%
Ability to utilize the majority of functionality within the tool	20%	17%
Scalability	14%	19%
Quality of support services	18%	14%
Customer segmentation capabilities	18%	12%
Custom events and variables	13%	15%
Responsiveness to your needs	12%	17%
Quality of strategic and consulting services	12%	9%
Ongoing education	7%	5%

■ Free tool
■ Fee-based tool

Figure 7: Tenure With Web Analytics Tools

"How long have you used your primary Web analytics solution?"
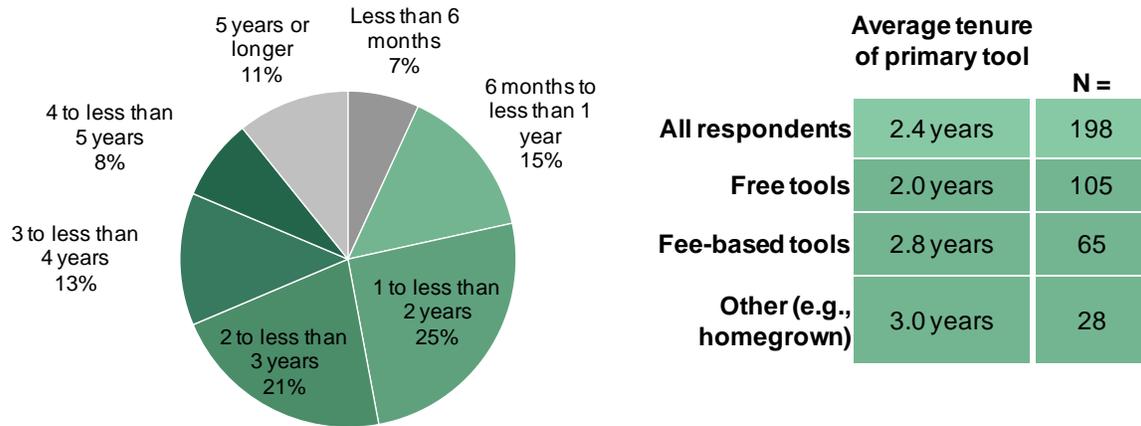
|	Average tenure of primary tool	N =
All respondents	2.4 years	198
Free tools	2.0 years	105
Fee-based tools	2.8 years	65
Other (e.g., homegrown)	3.0 years	28

Analysts Trump Technology

Large enterprises have demonstrated that their priorities are different from those of smaller organizations. More than one-third indicated that matching product capabilities to business requirements was an important consideration factor. Yet, to do this, organizations require talented analysts who are capable of developing measurement strategies and delivering on insight and action. These individuals are gaining recognition and traction with many large enterprises, but challenges still exist. Companies grapple with:

- **Avoiding excess by recognizing funding priorities.** Only 17% of all enterprises surveyed use the majority of their Web analytics tool capabilities (see Figure 8). A scant 19% of companies surveyed barely use any of their solution capabilities, leaving a bell curve of users falling between 31% and 70% use of tools. Variances in use of fee-based and free solutions indicate only a slightly higher use of fee-based tools. This reveals that few organizations are getting the maximum benefits from either free or fee-based Web analytics tools. Enterprise companies must ask themselves if they are paying too much for

capabilities that they simply do not need. In some cases, gaining fewer seldom-used capabilities is a worthwhile tradeoff if funds can be reallocated to hire more resources necessary for analysis.

- **Situational conflict that forces tough decisions.** Economic factors place pressure on many large enterprises, to the point where 39% have decreased budgets for Web analytics and 35% have decreased head count as well (see Figure 9). This scenario prevents a simple transfer of funds from technology to human resources. To further complicate matters, 28% of enterprises are increasing their use of Web analytics, and 23% are using Web analytics data to drive more decisions. These competing factors emphasize the need for enterprises to safeguard their analytics staff to ensure that Web analytics programs continue to generate the insight and data necessary to fuel their organizations.

- **Driving decisions with insight from active users.** More than two-thirds of survey respondents are frequent or power users who access their Web analytics tools as primary functions of their job responsibilities. This frequency of access indicates a familiarity with their Web analytics tools and presents an opportunity for these users to showcase the analytics data potential to their large enterprises, thereby further emphasizing the need to retain qualified Web analysts. Expert practitioners allow organizations to differentiate themselves from other enterprises competing on common Web analytics capabilities.

Figure 8: Tool Underutilization Invites Change
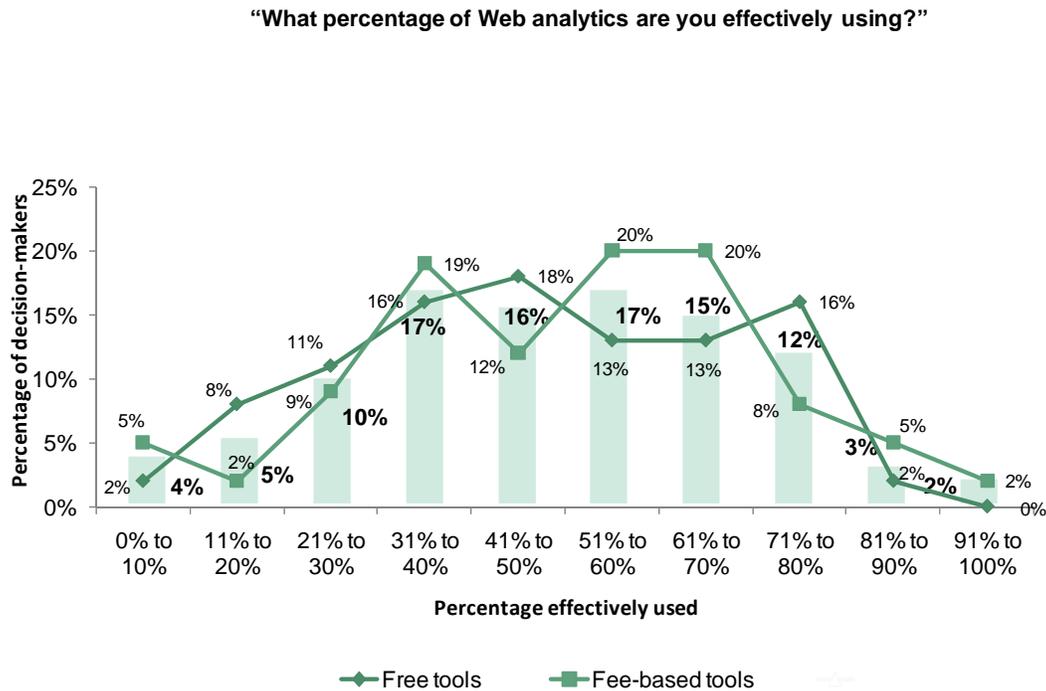
"What percentage of Web analytics are you effectively using?"

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Figure 9: Economic Factors Influence Decisions

"Has the current economic situation affected your Web analytics strategy in any of the following ways?"
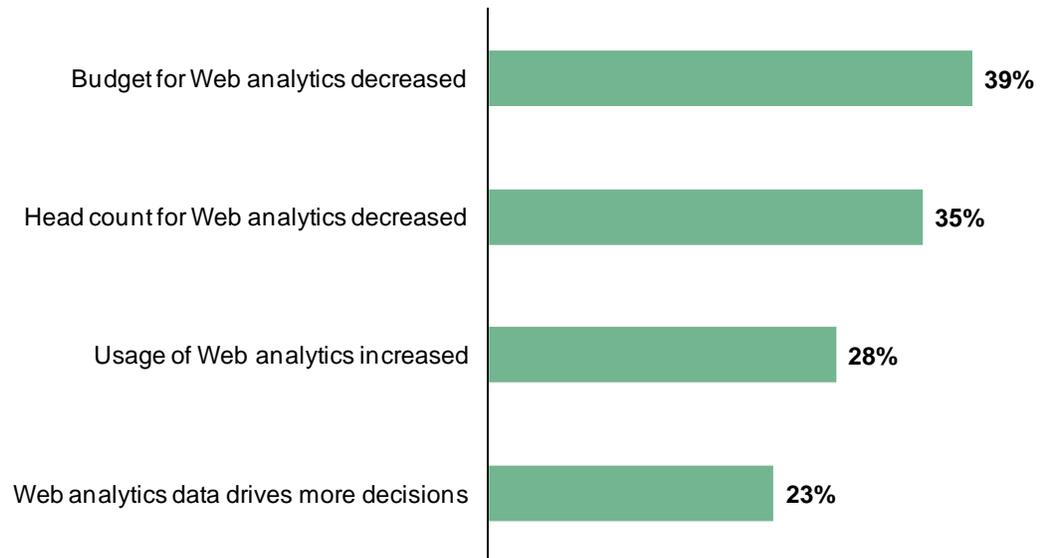
Base: 198 Enterprise Web analytics users
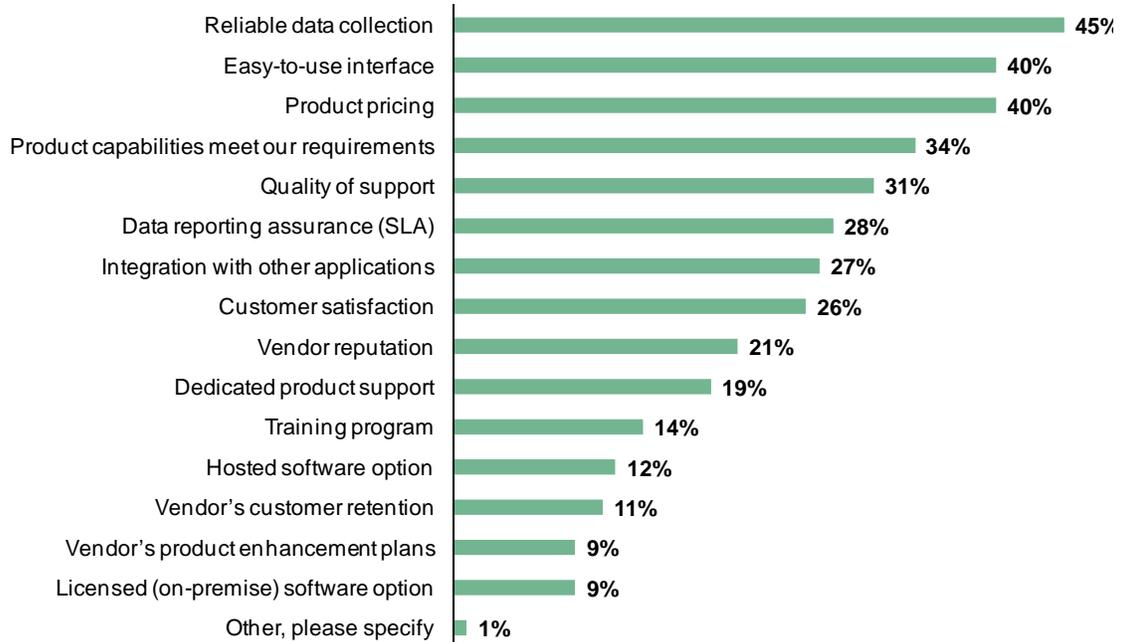Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Web Analytics Essentials

Once large enterprises establish a foundation for their Web analytics programs, attention turns to data collection, reporting, and analysis. These functions represent the core capabilities that Web analytics technologies bring to the enterprise and should be carefully prioritized according to individual business needs. However, this study indicates that large enterprises maintain:

- **Vendor selection based primarily on reliability, cost, and ease of use.** Enterprise-level users of Web analytics tools surveyed for this study made a resounding statement about their unwavering need for data quality and reliability. Yet, 40% of survey respondents listed an easy-to-use interface as a most important consideration factor when selecting a Web analytics solution (see Figure 10). Given the current use of tools and the overall importance of Web data, it's no surprise that enterprises seek these qualities in their vendors.

- **Data "must-haves" that include custom metrics and easy implementation.** For 38% of enterprises, the ability to customize metrics is an important one, followed closely by easy implementation and deployment, required by 36% (see Figure 11). Interestingly, 40% of fee-based-tool users cited this as an important capability, indicating that there may be pains associated with implementation. This is echoed by the fact that 19% of enterprises are currently using or evaluating a secondary solution because implementation does not require IT. While this is not always feasible, it is a benefit for some enterprises.

- **Power users who prioritize speed, flexibility, and visualization.** Figure 12 illustrates that all users want fast, flexible, and meaningful reporting, but power users place a higher emphasis on these capabilities. For many of these advanced practitioners, visualization is the sandbox in which they can analyze, interrogate and investigate their data to draw insight and meaning from the numbers. These users then rely on custom reporting or dashboards as a means for getting the right information out to stakeholders in their respective organizations.

Figure 10: Important Vendor Selection Criteria

"Please select the most important consideration factors for choosing a Web analytics solution."

Criteria	%
Reliable data collection	45%
Easy-to-use interface	40%
Product pricing	40%
Product capabilities meet our requirements	34%
Quality of support	31%
Data reporting assurance (SLA)	28%
Integration with other applications	27%
Customer satisfaction	26%
Vendor reputation	21%
Dedicated product support	19%
Training program	14%
Hosted software option	12%
Vendor's customer retention	11%
Vendor's product enhancement plans	9%
Licensed (on-premise) software option	9%
Other, please specify	1%

Base: 198 Enterprise Web analytics users
(multiple responses accepted)
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Figure 11: Important Data Capabilities

"Please select the most important <u>data capabilities</u> of a Web analytics solution."

Capability	Percentage
Custom metrics	38%
Easy implementation/deployment	36%
Benchmarking	34%
Data warehouse	34%
Ability to export data to other applications	33%
Collection of all data (no sampling in data collection)	28%
Administrative access controls	22%
Ability to import data for blended analysis	20%
Custom variable creation	20%
Ability to associate anonymous data with unique visitors	18%
Unlimited segmentation	16%
Implementation auditing	15%
Social media tracking	16%
Mobile device tracking	15%
Custom session definitions	14%
Other	1%

Base: 198 Enterprise Web analytics users
(multiple responses accepted)
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009
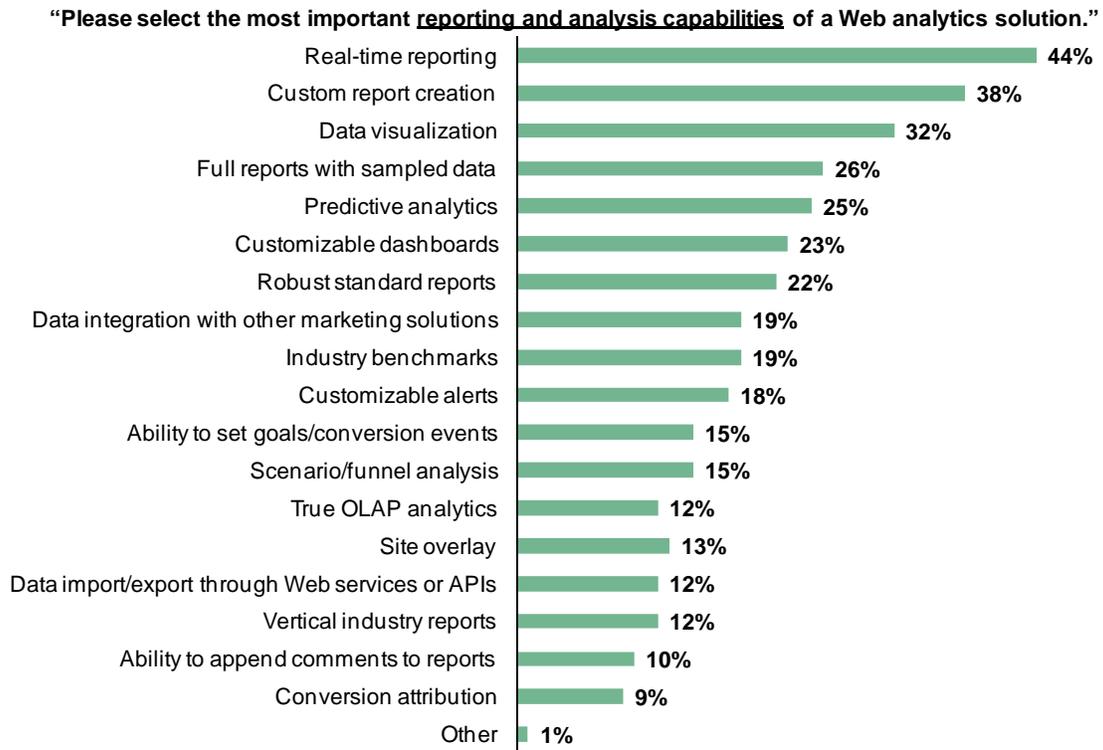
Figure 12: Important Reporting And Analysis Capabilities

"Please select the most important <u>reporting and analysis capabilities</u> of a Web analytics solution."

Capability	Percent
Real-time reporting	**44%**
Custom report creation	**38%**
Data visualization	**32%**
Full reports with sampled data	**26%**
Predictive analytics	**25%**
Customizable dashboards	**23%**
Robust standard reports	**22%**
Data integration with other marketing solutions	**19%**
Industry benchmarks	**19%**
Customizable alerts	**18%**
Ability to set goals/conversion events	**15%**
Scenario/funnel analysis	**15%**
True OLAP analytics	**12%**
Site overlay	**13%**
Data import/export through Web services or APIs	**12%**
Vertical industry reports	**12%**
Ability to append comments to reports	**10%**
Conversion attribution	**9%**
Other	**1%**

Base: 198 Enterprise Web analytics users
(multiple responses accepted)
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Enterprises Weigh Their Options

It's challenging for large organizations to know when the time is right for changing course on their Web analytics technology. After all, switching costs are high despite the fact that nearly two-thirds would consider that option. Thirty-five percent of organizations surveyed stated that they're too tightly integrated with their current vendor, and 20% simply don't believe that they could find the same capabilities in another vendor's solution. Yet, Forrester's in-depth survey of large organizations using Web analytics yielded several important observations about enterprises that derive great value from their Web analytics programs, including:

- **A balanced cost-benefit ratio.** Enterprise-class organizations recognize the value of their Web analytics programs on multiple levels within their organizations. This recognition shines through when companies are able to command budget for digital initiatives based on data derived from Web analytics, or when Web analytics revelations result in bottom-line earnings for large enterprises. These accomplishments come from well-defined Web analytics programs where the costs associated with technology are generating clear benefits in equitable terms for the business. Whether playing a direct or an indirect role in revenue generation, large organizations that spend hundreds of thousands of dollars on Web analytics technologies must clearly recognize the benefits. If not, organizations must reevaluate their vendor relationships.

- **Access to vendor or partner support.** No large organization — no organization of any size, for that matter — should be required to navigate Web analytics technologies and adjacent marketing functions without support. This support is available from numerous sources, including directly from vendors, from the expansive Web analytics consulting industry, and from qualified vendor partners. Today's technologies require sophisticated implementation, extensive training, and dedicated attention in order to function at maximum capacity. Thus the onus of education falls squarely on clients using these technologies, with vendors playing a role in collaboration and assistance in sourcing qualified channels for support.

- **A foundation of Web analytics process and human resources.** Large organizations must take an introspective look at their Web analytics programs to determine if their resources and processes are aligned for success. Too often, technologies are unjustly blamed for the inability to gain traction with Web analytics, when internal disorganization is to blame. Clients of Web analytics technologies must consider that people and resources dedicated to Web analytics provide cornerstone elements of success. Failure to nurture and establish these elements will result in sub-par results. Consider that change may be required in areas other than the technologies employed to achieve sustainable success.

- **Features and capabilities matched to unique business needs.** The Web analytics needs and wants of large enterprises span widely and are apt to change often. Companies seeking vendor partners must fully grasp their internal Web analytics needs in both the short and long term. These precautions will help manage expectations and will minimize overspending on unnecessary technologies. Further, the act of matching needs to vendor solutions with a vision for the future will allow enterprises to grow with their Web analytics tools. Users of Web analytics that possess a long long-term vision for analytical success ensure that their tools can scale with the growth of their organizations.
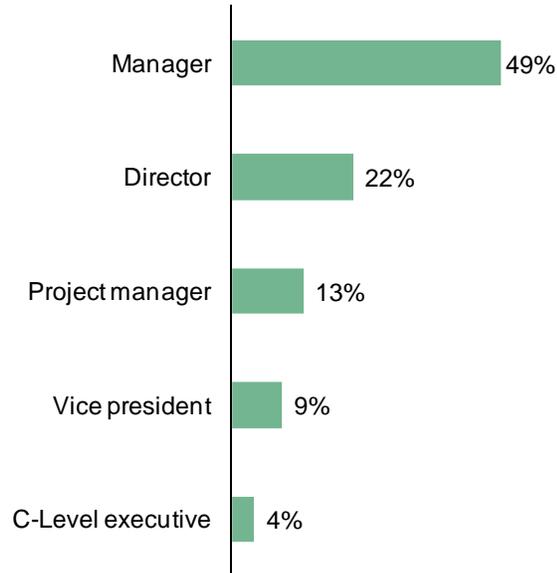
Appendix A: Methodology

In this study, Forrester conducted an online survey of 198 Web analytics decision-makers and influencers in the US. Respondents were offered incentives from the external survey vendor, ERI, as a thank you for time spent on the survey. The study began in March 2009 and was completed in August 2009. In this survey:

- All 198 respondents were from enterprises. Forrester defines enterprises as companies and organizations that have 1,000 or more employees. Twenty-six percent of respondents were from organizations with 1,000 to 4,999 employees; 40% were from organizations with 5,000 to 19,999 employees; and 34% of respondents were from organizations with 20,000 or more full-time employees.

- All respondents were knowledgeable with regard to their company's Web analytics technologies and programs and were also decision-makers or influencers in the planning and purchasing of Web analytics technologies. Thirteen percent of respondents were C-level executives or VP-level managers, 22% were at the director level, 49% were at the manager level, and 13% were project managers or other full-time employees.

- Respondents were from a variety of industries: technology/Internet (17%), business and industrial manufacturing (12%), financial services/banking (11%), retail/wholesale (9%), professional business services (6%), communications/telecom/media (6%), insurance (5%), healthcare/biotechnology/pharmaceuticals (5%), construction and engineering services (4%), other (4%), food (4%), beverages, and tobacco (4%), government (4%), distribution/logistics (3%), travel, airlines, hotels, and tourism (3%), automotive (3%), real estate (2%), energy, oil, gas, and utilities (2%), public services (2%), entertainment/leisure (2%), and advertising/PR/marketing services (1%).
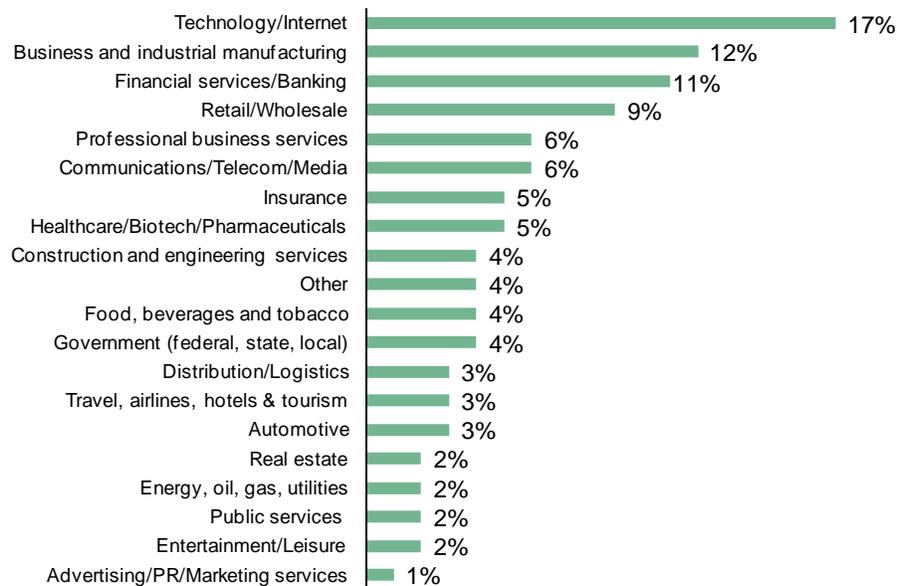
Appendix B: Demographics/Data

"Which of the following most closely describes your role within your organization?"

Role	Percentage
Manager	49%
Director	22%
Project manager	13%
Vice president	9%
C-Level executive	4%

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

"Which of the following best describes your primary type of business?"

Business type	Percentage
Technology/Internet	17%
Business and industrial manufacturing	12%
Financial services/Banking	11%
Retail/Wholesale	9%
Professional business services	6%
Communications/Telecom/Media	6%
Insurance	5%
Healthcare/Biotech/Pharmaceuticals	5%
Construction and engineering services	4%
Other	4%
Food, beverages and tobacco	4%
Government (federal, state, local)	4%
Distribution/Logistics	3%
Travel, airlines, hotels & tourism	3%
Automotive	3%
Real estate	2%
Energy, oil, gas, utilities	2%
Public services	2%
Entertainment/Leisure	2%
Advertising/PR/Marketing services	1%

Base: 198 Enterprise Web analytics users
Source: a commissioned study conducted by Forrester Consulting on behalf of Google, May 2009

Appendix C: Endnotes

[1] See Forrester's May 27, 2009, "US Web Analytics Forecast, 2008 To 2014" report.

[2] See Forrester's July 23, 2009, "The Forrester Wave™: Web Analytics, Q3 2009" report.