2020 CYBER FIVE
(THANKSGIVING - CYBER MONDAY)
BY THE NUMBERS

DECEMBER 3, 2020

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WE HELP ECOMMERCE BRANDS
FIND & ENGAGE
HIGH VALUE CUSTOMERS

&

ACQUIRE

GAME CHANGING INSIGHTS

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OUR SOLUTIONS

- **PAID SEARCH & SHOPPING**

- **SEARCH ENGINE OPTIMIZATION**

- **SOCIAL MEDIA MARKETING**

- **AMAZON MARKETING SERVICES**

- **ANALYTICS CONSULTING**

- **ECOMMERCE TECH DEV**

PARTNERS

UPS Ready® UPS | PREMIER Google Partner | b Bing Select Partner | f Marketing Partner

CLIENTS

Ames Walker | Ashley Stewart® | amika: | blindsgalore | JEFFERS

circa LIGHTING® | CPO® | DOVER SADDLERY® | TOOLSTODAY Your source for industrial cutting tools! | Kansas City STEAK COMPANY

Lenovo™ | newton baby | ROCKLER WOODWORKING AND HARDWARE | CROSS™ | Cole-Parmer scientific experts

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ABOUT UDAYAN BOSE

Founder & CEO of NetElixir
Founded partybingo.com (partygaming)

Guest Lecturer:
- Johnson School of Management, Cornell University
- City University of New York, Baruch
- Indian School of Business

in linkedin.com/in/udayanbose

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RESULTS & TRENDS
(THANKSGIVING-CYBER MONDAY)

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BASIS OF THIS PRESENTATION

- Hourly Search Marketing and Website data recording and analysis for our holiday retailers between Thanksgiving Day and Cyber Monday. (Aggregated Holiday Traffic Data > 50 MM Sessions)

- Data captured separately for mobile and desktop for 6 holiday categories.

- We used our proprietary customer intelligence technology, LXRInsights™, to gain deeper understanding of holiday consumer behavior.

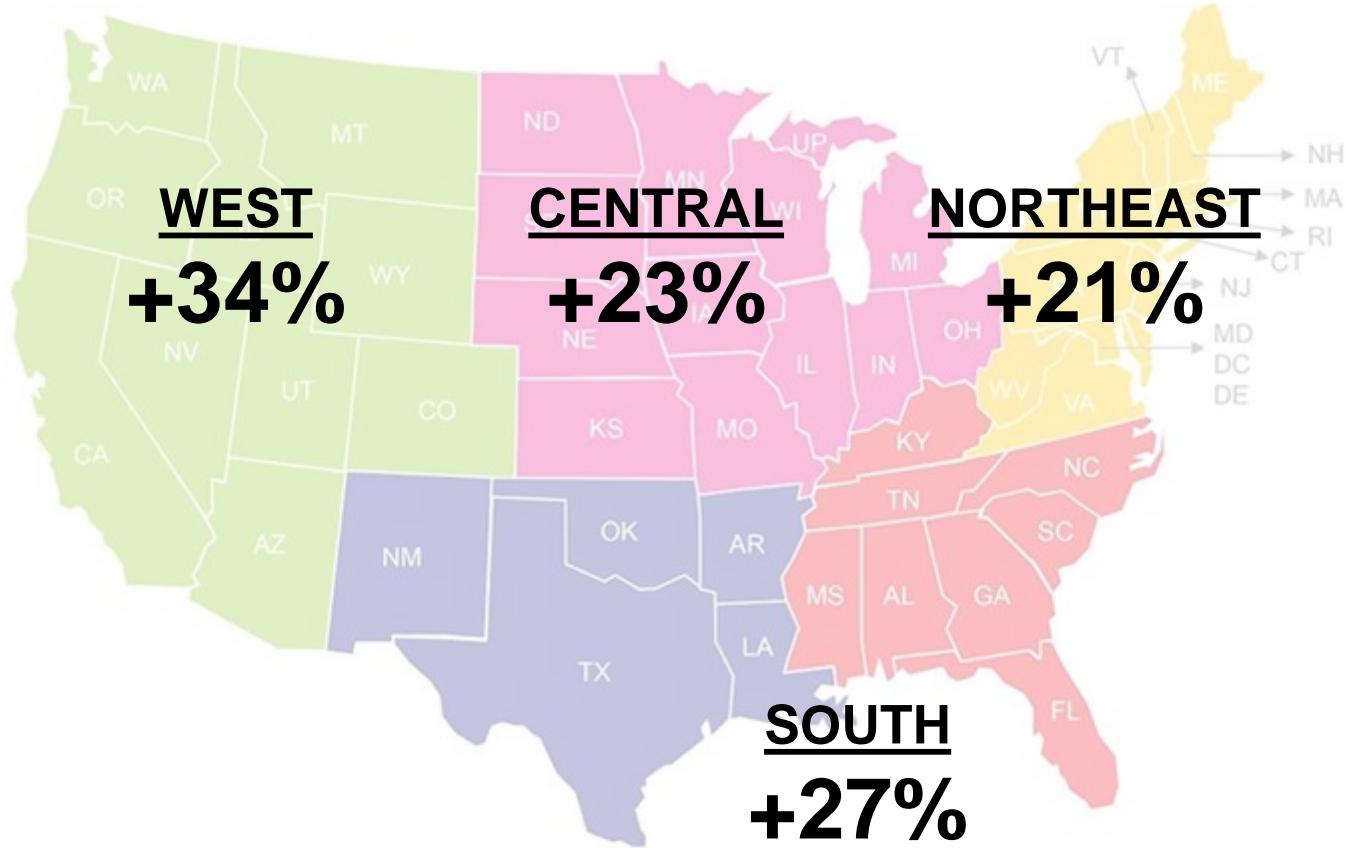- This is our 13th Annual Cyber 5 Results Report.

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+30% Y/Y
ECOMMERCE GROWTH

+45% Y/Y GROWTH (NOVEMBER)
+20% Y/Y GROWTH (DECEMBER)

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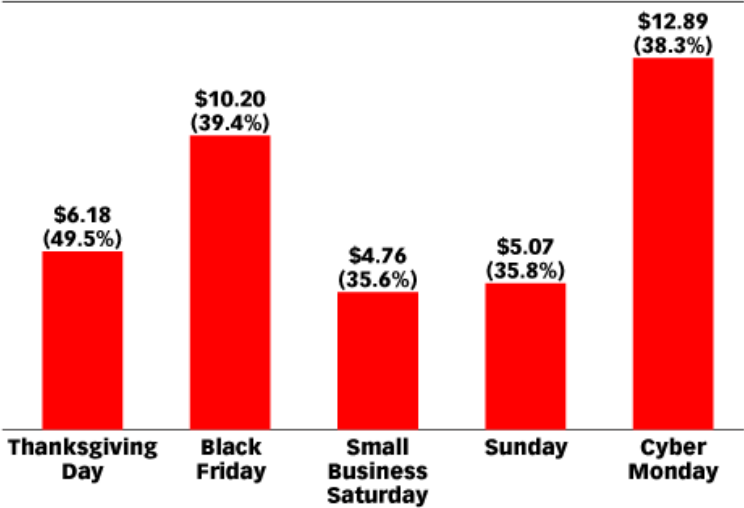
Y/Y CHANGE
OVERALL US ECOM SALES INCREASED BY 25.6%

WEST
+34%

CENTRAL
+23%

NORTHEAST
+21%

SOUTH
+27%

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THE TOP 10 & THE BOTTOM 10 STATES (%Y/Y CYBER 5 ECOMMERCE SALES REVENUE)

Top 10 States	%Y/Y Growth
New Mexico	101%
Maine	91%
Alaska	76%
South Dakota	75%
Nevada	67%
Wyoming	58%
Idaho	57%
Colorado	55%
Delaware	55%
Vermont	53%

Bottom 10 states	%Y/Y Growth
Georgia	18.6%
Tennessee	17.8%
Kentucky	16.5%
South Carolina	16.1%
Illinois	15.4%
New York	9.2%
Minnesota	7.5%
District of Columbia	1.2%
West Virginia	0.1%
Hawaii	-10.6%

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CYBER 5: DAYWISE SALES VS. PROJECTIONS

US Cyber Five Retail Ecommerce Holiday Season Sales, by Shopping Day, Nov-Dec 2020
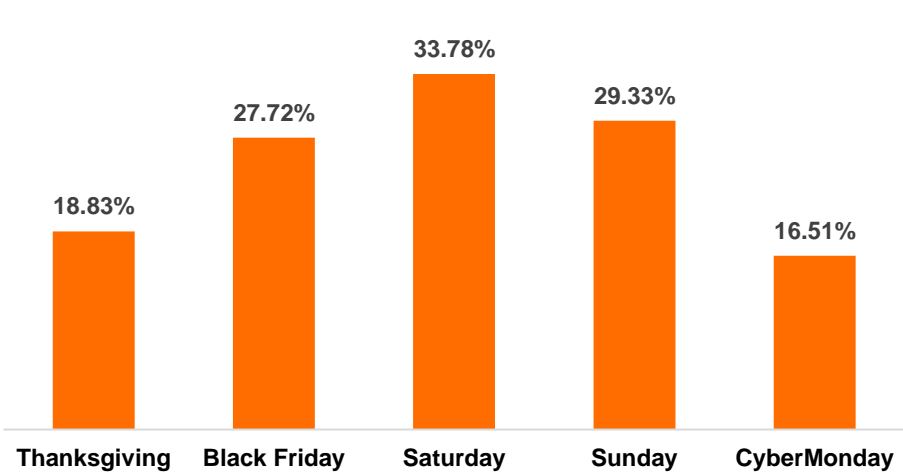*billions and % change vs. prior year*

Thanksgiving Day	Black Friday	Small Business Saturday	Sunday	Cyber Monday
$6.18 (49.5%)	$10.20 (39.4%)	$4.76 (35.6%)	$5.07 (35.8%)	$12.89 (38.3%)

Note: excludes travel and event tickets, payments (such as bill pay, taxes, or money transfers), food services and drinking place sales, gambling and other vice good sales; includes products or services ordered using the internet, regardless of the method of payment or fulfillment
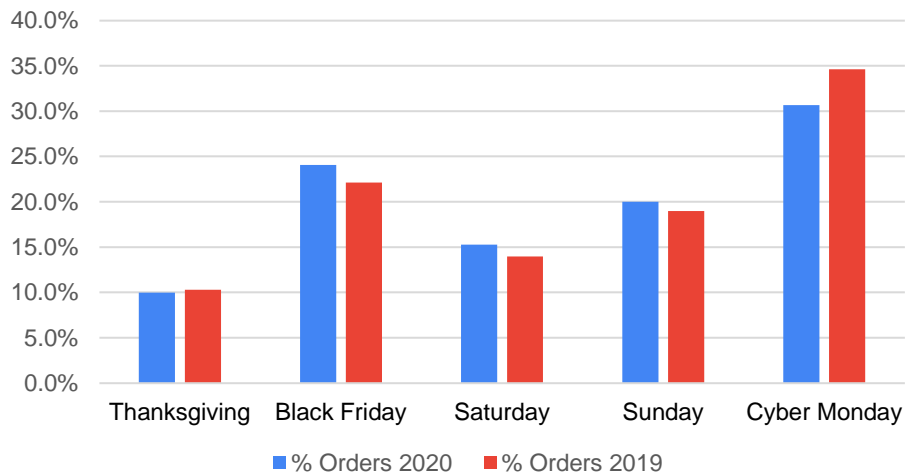*Source: eMarketer, Sep 2020*

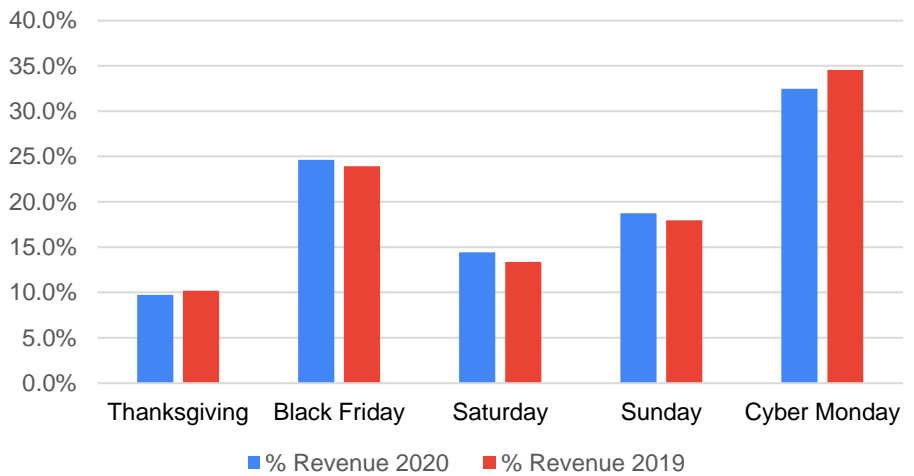259617

www.**eMarketer**.com

Y/Y Revenue Growth

Thanksgiving	Black Friday	Saturday	Sunday	CyberMonday
18.83%	27.72%	33.78%	29.33%	16.51%

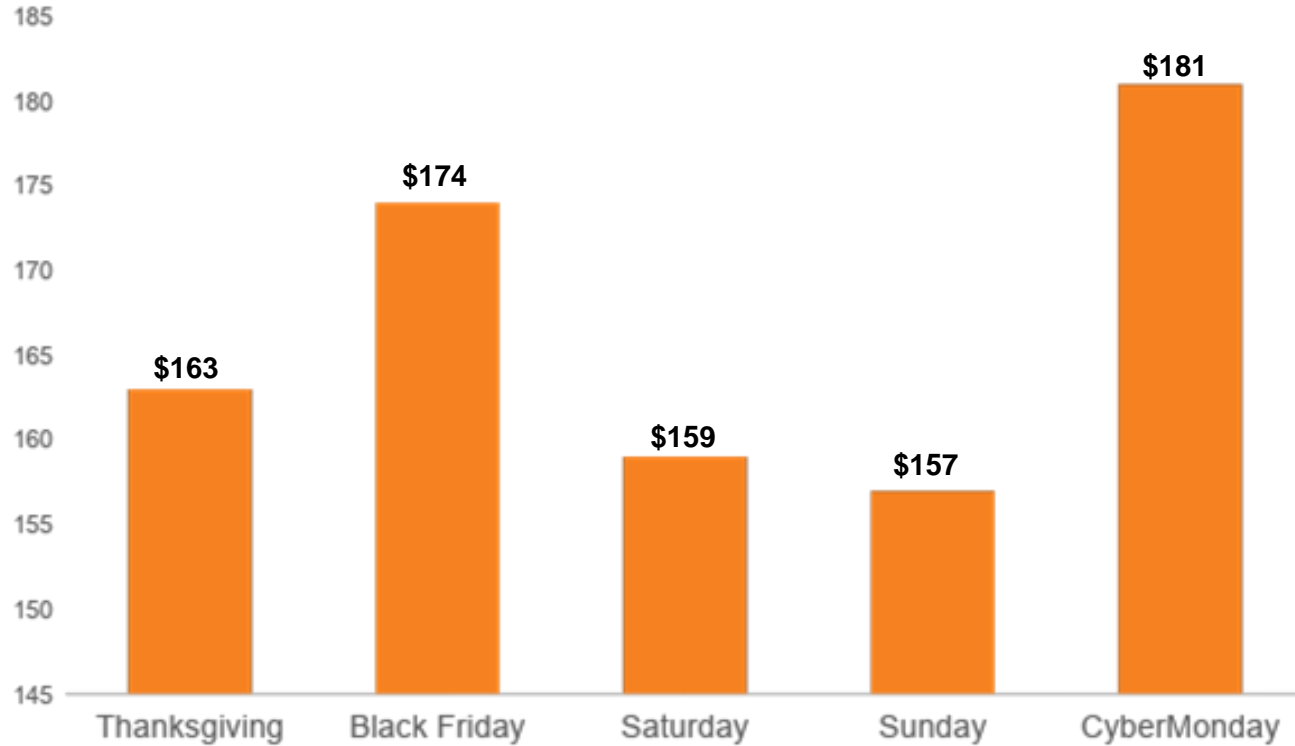NetElixir™

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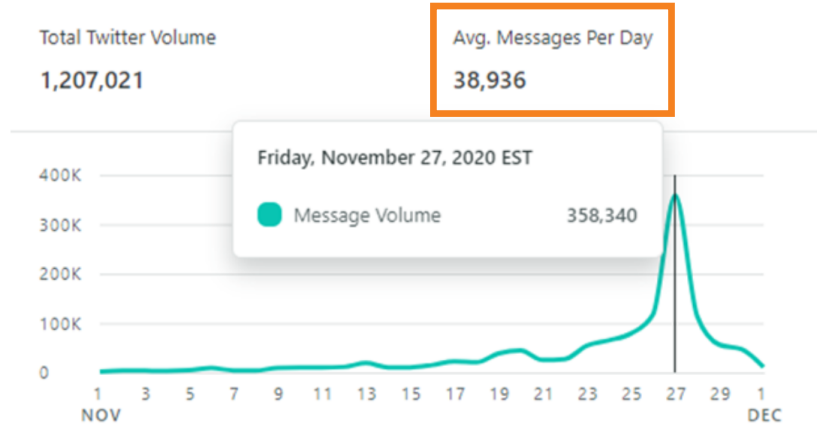
ORDERS BY DAY
(THANKSGIVING TO CYBERMONDAY)
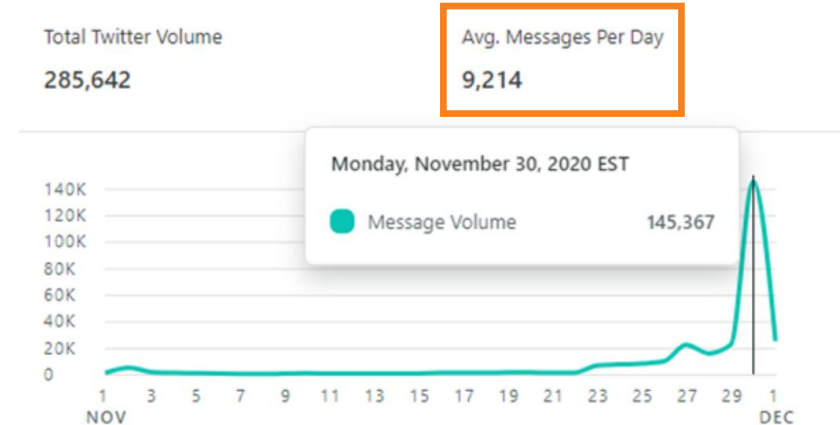
CYBER MONDAY HAD HIGHEST AOV +30% Y/Y

CYBER MONDAY BEAT OTHER DAYS IN AVERAGE ORDER SIZE (AOV)

#BLACKFRIDAY HAD A LOT MORE BUZZ ON TWITTER THAN CYBERMONDAY: A SIGN OF SHOPPER FATIGUE?

Total Twitter Volume

1,207,021

Avg. Messages Per Day

38,936

Friday, November 27, 2020 EST

● Message Volume   358,340

#blackfriday *hashtag usage volume on Twitter. Source: Social Sprout*

Total Twitter Volume

285,642

Avg. Messages Per Day

9,214

Monday, November 30, 2020 EST

● Message Volume   145,367

#cybermonday *hashtag usage volume on Twitter. Source: Social Sprout*

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CATEGORY-WISE Y/Y ECOMMERCE GROWTH

RETAIL CATEGORY	%Y/Y GROWTH IN ONLINE ORDERS NOVEMBER 2020	%Y/Y GROWTH IN ONLINE ORDERS (CYBER 5)
Apparel	10.14%	-6.09%
Food	70.50%	96.47%
Gifting	24.25%	22.91%
Home Improvement	60.14%	72.3%
Hardware & Tools	23.44%	3.97%
Pet Supplies	25.26%	13.28%
Total	29.0%	25.6%

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3 PANDEMIC HOLIDAY SHOPPING TRENDS RETAILERS NEED TO PAY ATTENTION TO

1. **<u>Needs prevail over Wants</u>**: The pandemic has led to a shift in buying preferences towards essential product categories (ex. Food & grocery, pet supplies) and currently relevant product categories (ex. home furnishings, home decor).

2. **<u>Shopping Fatigue</u>**: There are signs that shopping fatigue maybe setting in for many categories like apparel that experienced a Y/Y decline in both shoppers and revenue.

3. **<u>The Latency Challenge</u>**: More frequent website visits in shorter time. Shoppers visited websites more frequently (+13%), within a shorter span of time between first visit and purchase (-7%). However, fewer shoppers purchased in the non-essential categories. Example. For beauty category, latency went down by 19% (204 to 166 minutes between first website visit and purchase. You can read more here - https://www.glossy.co/beauty/beauty-e-commerce-black-friday-bright-spot/

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WHAT WERE THE TOP DAY-PARTS: WHEN DID SHOPPERS BUY ONLINE?

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DAYPARTS (SITEWIDE ORDERS)

MIDNIGHT OF 11/26 – MIDNIGHT OF 11/30
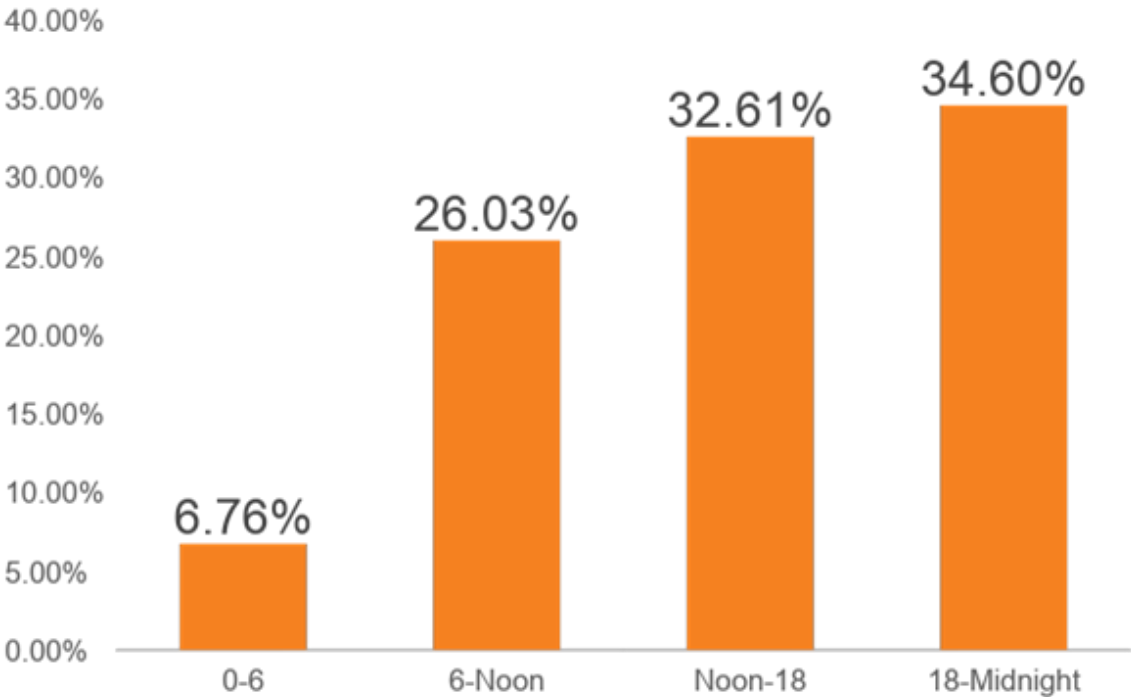
THANKSGIVING   CYBER MONDAY

2019

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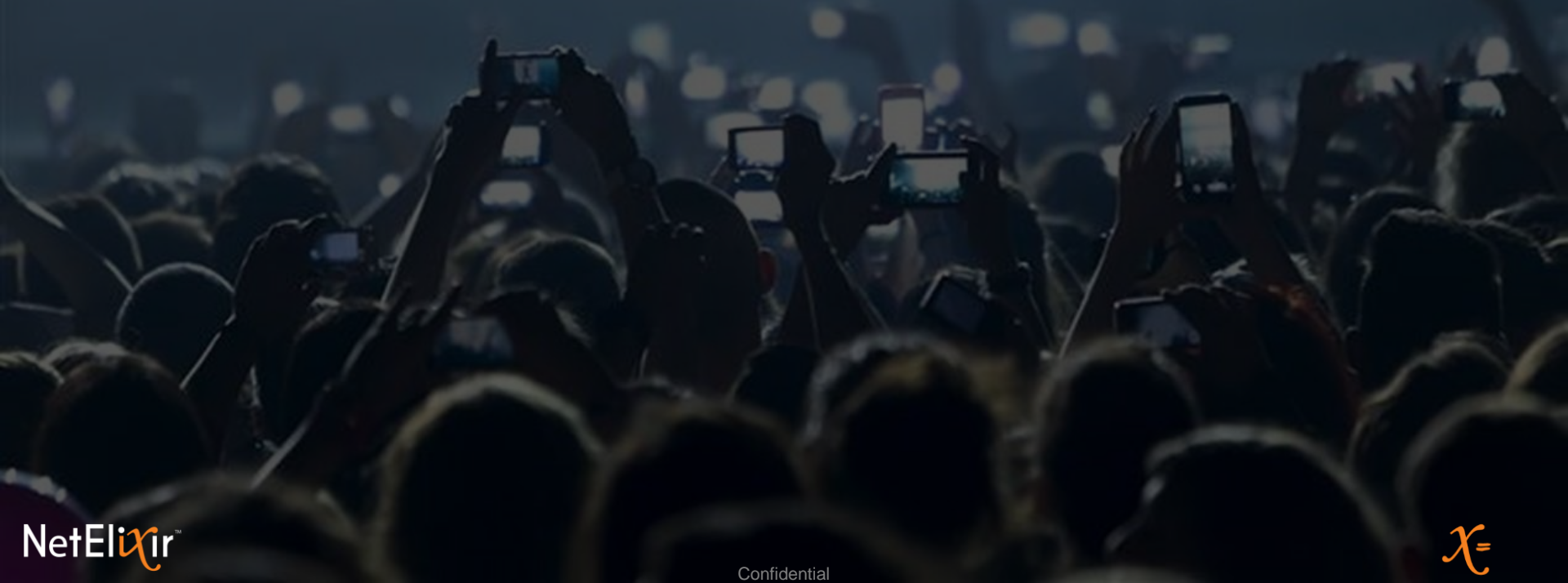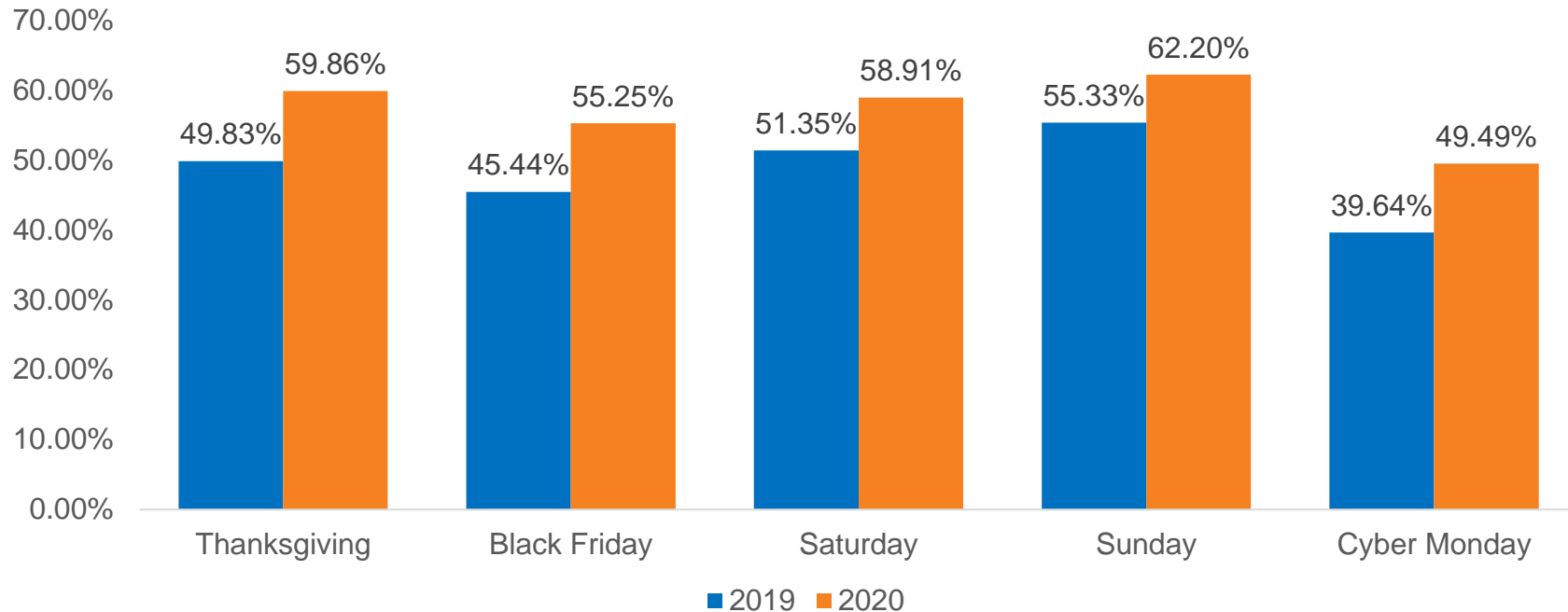
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HOW BIG WAS THE IMPACT OF MOBILE THIS YEAR?

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MOBILE ORDERS CONTRIBUTED TO 55% OF SITEWIDE ORDERS AOV ON MOBILE WAS 38% LOWER THAN DESKTOP

MOBILE SHARE BY CATEGORY

MOBILE SHARE: IMPRESSIONS		ORDERS	
Apparel:	81%	79%	
Pet Supplies:	68%	52%	
Food & Gourmet:	58%	39%	
Gifting:	67%	45%	
Home Improvement:	58%	30%	
Tools:	61%	40%	

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REVENUE SHARE OF NEW PRODUCT SEGMENTS
(2020 VS. 2019)

INDUSTRY :	% REVENUE
Fashion & Apparel:	**84%**
Pet Supplies:	**20%**
Food & Gourmet:	**15%**
Home Improvement:	**23%**
Tools:	**33%**
Gifting:	**50%**
Electronics:	**36%**

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OUR OUTLOOK FOR REMAINDER OF THE 2020 HOLIDAY SEASON

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CATEGORY-WISE Y/Y ECOMMERCE GROWTH

RETAIL CATEGORY	%Y/Y GROWTH IN ONLINE ORDERS NOVEMBER 2020	%Y/Y GROWTH IN ONLINE ORDERS DECEMBER 2020, EST.	%Y/Y GROWTH IN ONLINE ORDERS NOVEMBER + DECEMBER
Apparel	10.14%	-2.0%	5.0%
Food	70.50%	60.0%	63.0%
Gifting	24.25%	15.0%	20.0%
Home Improvement	60.14%	40.0%	48.0%
Hardware & Tools	23.44%	10.0%	14.0%
Pet Supplies	25.26%	12.0%	17.0%
Total	29.0%	13.0%	19.0%

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WE ARE REVISING OUR ORIGINAL GROWTH PROJECTION FOR 2020 HOLIDAY ONLINE SALES FROM +30% TO…

19% Y/Y GROWTH

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2021 STRATEGY PLAYBOOOK
CUSTOMIZED PLAYBOOK & CONSULTATION

CHIME IN THE NEW YEAR WITH A COMPETITIVE ADVANTAGE

SIGN UP @
NETELIXIR.COM/2021PLAYBOOK

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THANK YOU

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