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Holiday Season Summary

2013 was the shortest online shopping season since 2002 with only 27 days between Thanksgiving and Christmas. Despite the condensed season, **online sales grew by 18% over last year**, and November plus December accounted for 27% of total annual sales for the average US retailer; a higher share than any other country.

Compared to their European counterparts, US consumers waited much longer to start holiday shopping. Unfortunately, US consumers have been conditioned to wait for Black Friday for the best deals and when Thanksgiving falls late in the season retailers miss out important shopping days. This year the late start to the season cost retailers more than a billion in potential online sales.
Mobile Shopping

In-store mobile shopping started to take off in 2012. This year, while waiting in long lines on Black Friday or visiting family over the Thanksgiving weekend, consumers said they would shop 40% more from their mobile device than last year. In 2013 mobile shopping accounted for 14% of total holiday online sales for the average US retailer and on some unique shopping days it was much higher. Mobile shopping hit its peak at 26% of all online sales on Black Friday.

Two important things happened on Black Friday to drive up mobile shopping that retailers should expect to see more:

1. Smartphone apps allowed consumers to shop online while waiting in long lines.
2. Doorbusters on Thanksgiving led to shopping fatigue on Black Friday. Many consumers chose to shop on tablets from the comfort of their couches rather than go out again.
Social Impact

2% of shoppers jump directly from a social network to a retail website (last click), but 36% of U.S. consumers say that a significant portion (about 30% or more) of their holiday purchases require them to consult social media before making a final purchase decision. As we noted in our recent Social Media Intelligence Report, with ads in the newsfeed and promoted tweets and pins, advertising impressions on sites like Facebook are up 85% versus last year. More relevant advertising on Facebook, Pinterest and Twitter led to 12, 24, and 17 percent social referral share growth respectively for these networks, while other social sites, Tumblr, Reddit, Blogger, and YouTube were down year over year. Retailers need to understand the value of social media in the purchasing journey to effectively use social to drive online sales and not measure social marketing by just looking at direct referrals.
Consumers took full advantage of their mobile devices to “shop on the sly” on Thanksgiving Day. Retailers poured money into new mobile capabilities this year by adding WiFi to key stores, expanding mobile application offerings, and optimizing websites for easier transactions from small screens. These investments in mobile paid off, driving customers to use their smartphones and tablets more this year. Online shopping peaked in the evening as consumers shopped from their phones while taking advantages of deals in-store.

Online Sales by the Hour
(In millions)

<table>
<thead>
<tr>
<th>Time</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 am</td>
<td>$140</td>
<td>$100</td>
<td>$60</td>
<td>$20</td>
</tr>
<tr>
<td>06:00 am</td>
<td>$140</td>
<td>$100</td>
<td>$60</td>
<td>$20</td>
</tr>
<tr>
<td>12:00 pm</td>
<td>$140</td>
<td>$100</td>
<td>$60</td>
<td>$20</td>
</tr>
<tr>
<td>06:00 pm</td>
<td>$140</td>
<td>$100</td>
<td>$60</td>
<td>$20</td>
</tr>
<tr>
<td>11:00 pm</td>
<td>$140</td>
<td>$100</td>
<td>$60</td>
<td>$20</td>
</tr>
</tbody>
</table>

18% INCREASE year-over-year
Black Friday

Last year, sales started picking up online at 6 a.m. ET on Black Friday. This year things began ramping up three hours earlier as a result of increased in-store mobile shopping and new strategies that staged releases of "door-buster" promotions throughout the day. With in-store shopping happening early in the day on Thanksgiving, consumers appeared to head home earlier and continue shopping online. Online shopping peaked between 11 a.m. and 12 p.m. ET on Black Friday, when retailers pulled in $150 million in a single hour.

Online Sales by the Hour
(In millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>00 am</th>
<th>06 am</th>
<th>12 pm</th>
<th>06 pm</th>
<th>11 pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td></td>
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<td>2011</td>
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<td>2012</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td></td>
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</tr>
</tbody>
</table>

39% INCREASE
year-over-year

ADOBE DIGITAL INDEX | 2013 Holiday and eCommerce Benchmark
Cyber Monday shopping patterns were consistent with previous years. Online sales peaked between 8 p.m. and 9 p.m., with sales in that hour alone totaling $150 million. On Cyber Monday, mobile played a lesser role, as consumers seemed more than happy to sit at their work computers or at home with their laptops in the evening hours and shop. Even at 18% of sales on Cyber Monday, however, the total sales attributed to a tablet or smartphone this Cyber Monday was $419 million ($290 million from tablets and $129 million from smartphones). 29% of visits to retailers’ websites came from smartphones, but these visitors converted to sales at a much lower rate than did tablets or desktop users.
Merchant Type

Not all types of retailers fared equally during the 2013 holiday season. **Brick and Click retailers grew faster than Online Only retailers** (25% vs 17% growth YoY). Brick and Click growth came from mobile shopping (21% of online sales over Thanksgiving weekend). Online Only and other non-traditional retailers captured a greater share of sales later in the season.

**Mobile Share of Sales**

<table>
<thead>
<tr>
<th>Merchant Type</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>ONLINE ONLY</td>
<td>20%</td>
<td>+4.5%</td>
</tr>
<tr>
<td>BRICK &amp; CLICK</td>
<td>15%</td>
<td>+6.4%</td>
</tr>
<tr>
<td>BRAND MANUFACTURER</td>
<td>10%</td>
<td>+5.3%</td>
</tr>
<tr>
<td>CATALOG &amp; TV</td>
<td>5%</td>
<td>+5.7%</td>
</tr>
</tbody>
</table>

**Share of Sales by Day**

- **Thanksgiving**: 30%
- **Black Friday**: 50%
- **Cyber Monday**: 20%

- **Online Only**: 10%
- **Brick & Click**: 30%
- **Brand Manufacturer**: 10%
- **Catalog & TV**: 5%
Category breakdowns of mobile and social influenced shopping reveal important differences retailers should keep in mind. Mobile is more common when shopping for traditional gift items like toys, apparel, and jewelry and less common in higher-ticket categories like automotive and electronics. Also, the purchase of softgoods like housewares and health items are more likely to be influenced by social media while hardware and automotive retailers see relatively few social referrals.
International

Shopping data reveals that many global retailers are exporting US Cyber Monday promotions, but the relatively less known Green Monday remains the natural peak sales day for many consumers all around the world.

Christmas online shopping around the world

Key dates by country (2, 3, 4x normal daily sales)
International (cont.)

US retailers earned nearly 27% of their total annual online sales during the holiday shopping months of November and December. Switzerland followed closely by France, Austria, and Germany saw the lowest share of annual sales during the holiday months. Those same four countries also trailed the pack in their share of sales from mobile devices, further emphasizing the importance of mobile to eCommerce success in 2013.

Consumers in the UK, followed closely by Australia, proved to be the most mobile shoppers during the last holiday season. Japan continues to see more smartphone shopping with more than double the share of purchases coming from smartphones than any other country. Tablets are disproportionately less important in Japan but that won’t be true for long.
2013 Acquisition Benchmarks

% DIRECT
Direct Load / Total Visits
BEST OF THE BEST: 56%
AVERAGE: 40%

% SEARCH
Search Referred / Total Visits
BEST OF THE BEST: 52%
AVERAGE: 36%

% SOCIAL
Social Referred / Total Visits
BEST OF THE BEST: 1.6%
AVERAGE: 0.9%

% OTHER WEBSITES
Other Referred / Total Visits
BEST OF THE BEST: 31%
AVERAGE: 20%
2013 Engagement Benchmarks

**AFFINITY**
Returning Visitors / Total Visitors
- **BEST OF THE BEST**: 91%
- **AVERAGE**: 82%

**STICKINESS**
Multi-page Visits / Total Visits
- **BEST OF THE BEST**: 66%
- **AVERAGE**: 54%

**FREQUENCY**
Visitors / Visitors (Returning)
- **BEST OF THE BEST**: 4.42
- **AVERAGE**: 3.60

**RECENTY**
Average Days Since Last Visit
- **BEST OF THE BEST**: 13.16
- **AVERAGE**: 10.88

**RELEVANCY**
Page Views / Visit (Multi-page)
- **BEST OF THE BEST**: 13.36
- **AVERAGE**: 10.10

**CONSUMPTION**
Average Minutes Per Visit
- **BEST OF THE BEST**: 8.75
- **AVERAGE**: 6.97
2013 Conversion Funnel Benchmarks

- **ADD-TO-CART RATE**: Carts / Visit (Non-bounce)
  - BEST OF THE BEST: 95%
  - AVERAGE: 89%

- **CHECKOUT COMPLETION**: Orders / Checkouts
  - BEST OF THE BEST: 68%
  - AVERAGE: 49%

- **CHECKOUT INITIATION RATE**: Checkouts / Carts
  - BEST OF THE BEST: 72%
  - AVERAGE: 52%

- **AVG. SIZE ORDER**: Units / Orders
  - BEST OF THE BEST: 4.15
  - AVERAGE: 2.90

- **AVG. UNIT VALUE**: Direct Load / Total Visits
  - BEST OF THE BEST: $110.93
  - AVERAGE: $62.82
2013 eCommerce Benchmarks

**Revenue / Orders**

- **AVG. ORDER VALUE**
  - Revenue / Orders
  - Best of the Best: $228.53
  - Average: $147.81
- **REVENUE PER VISIT**
  - Revenue / Visits
  - Best of the Best: $4.21
  - Average: $2.49

**Conversion (Order)**

- Orders / Visits
  - Average: 1.96%
  - Best of the Best: 3.28%

**Revenue / Visits**

- Average: $2.49
2013 Customer Loyalty Benchmarks

% NEW SHOPPERS
- Best of the Best: 99%
- Average: 97%

% RETURNING SHOPPERS
- Best of the Best: 6%
- Average: 3%

PURCHASE AND RETURN RATE
- Best of the Best: 138%
- Average: 90%

REPEAT PURCHASE RATE
- Best of the Best: 17%
- Average: 11%

REMARKETING EFFECTIVENESS
- Best of the Best: 427%
- Average: 270%

LOYALTY RATE
- Best of the Best: 164%
- Average: 103%
2013 Mobile Traffic Benchmarks

<table>
<thead>
<tr>
<th>Category</th>
<th>Best of the Best</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone % of Visits</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Tablet % of Visits</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Phone: Relative Engagement</td>
<td>93%</td>
<td>70%</td>
</tr>
<tr>
<td>Tablet: Relative Engagement</td>
<td>111%</td>
<td>99%</td>
</tr>
</tbody>
</table>