

The State of eCommerce: Trends for 2020 and Beyond

MMA Webinar Series
October 22, 2019

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MMA



MMA Purpose

WHO (The People We Serve):

Prime Audience: Chief Marketers

WHY (Our Reason for Being):

Purpose: To accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

WHAT (Our Strategic Priorities):

Primary Focus:

1. **Demonstrating Measurement and Impact:** proving effectiveness and optimizing impact
2. **Cultivating Inspiration:** aimed at the Chief Marketer; guiding best practices and driving innovation
3. **Building Capability for Success:** fostering know-how and confidence within the Chief Marketer's organization

Secondary Focus:

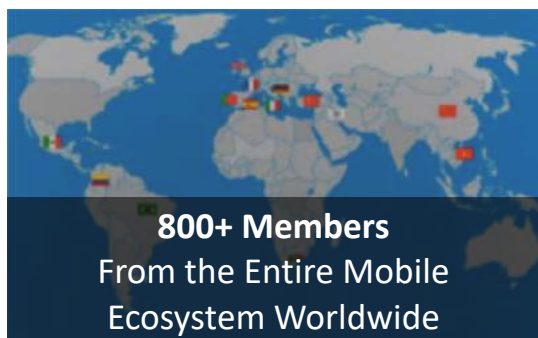
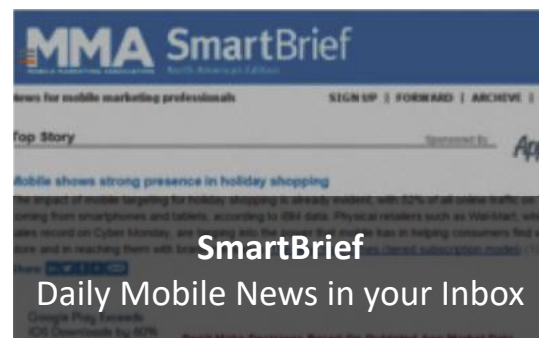
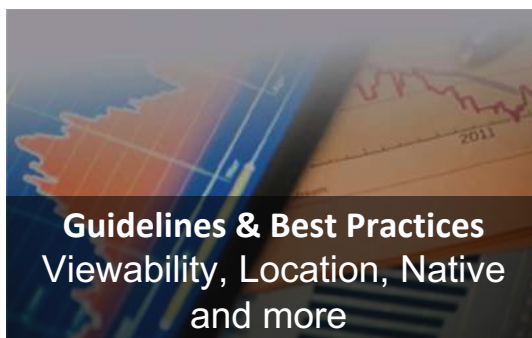
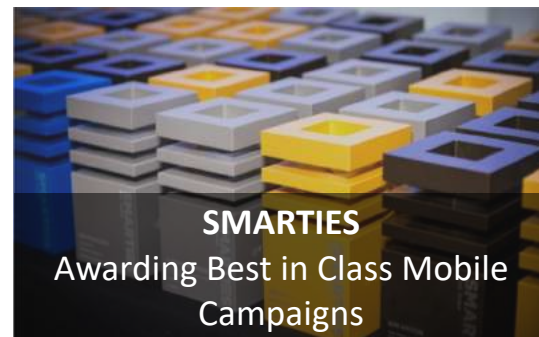
Advocacy – monitoring and maintenance activity only; via partnership with the DAA

MMA IS 800+ MEMBERS STRONG GLOBALLY

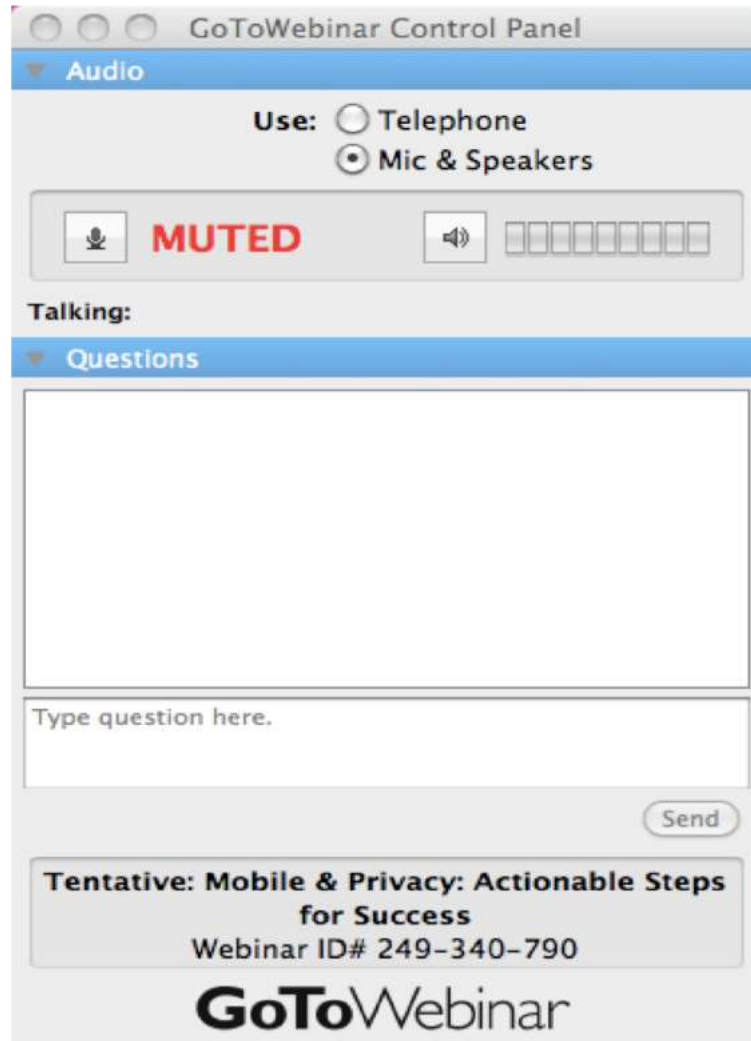
MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS

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MMA MEMBERSHIP



MANAGING YOUR QUESTIONS



Share the Insights

#MMAWeb

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PRESENTER



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MMA

Today's Hosts

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Head of Digital Insights

Behavioral Data Fiend,
Harvard Ph.D., Author,
Hacky Comedian

Jason Goldberg



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Chief Commerce
Strategy Officer

The Jason & Scot Show Podcast
@RetailGeek



Jumpshot: Every Search, Click & Buy. On Every Site.

Accuracy

Make confident decisions with unrivaled accuracy

100M Devices

5B Clicks Per Day

14 Months Ave Tenure

Breadth

Unlock consumer behavior and competitive insights across the entire web

800+ Websites

150+ Marketplaces

188 Countries

Granularity

Get as precise and as granular as your business needs

1M Brands

1,615 Categories

300M Shopping Events

Today's Topics

The “Big Five” eCommerce Sites

Assorted Retailers on the Rise

Selected Struggling Retailers



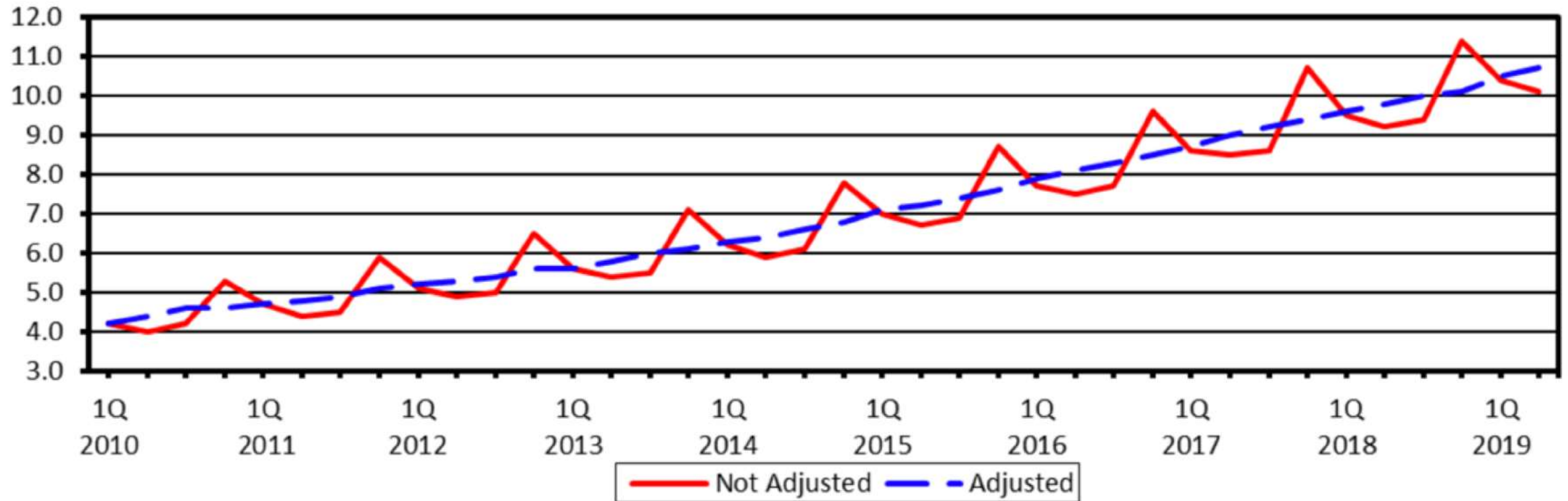
Unless otherwise noted, data in this document are US-based and from Q1-3 2019 (including desktop and Android mobile web data)

Stay tuned for our “eCommerce Index” report for more details

Somehow, eCommerce is Still Just Getting Started

**Estimated Quarterly U.S. Retail E-commerce Sales as a Percent of Total Quarterly Retail Sales:
1st Quarter 2010 – 2nd Quarter 2019**

Percent of Total

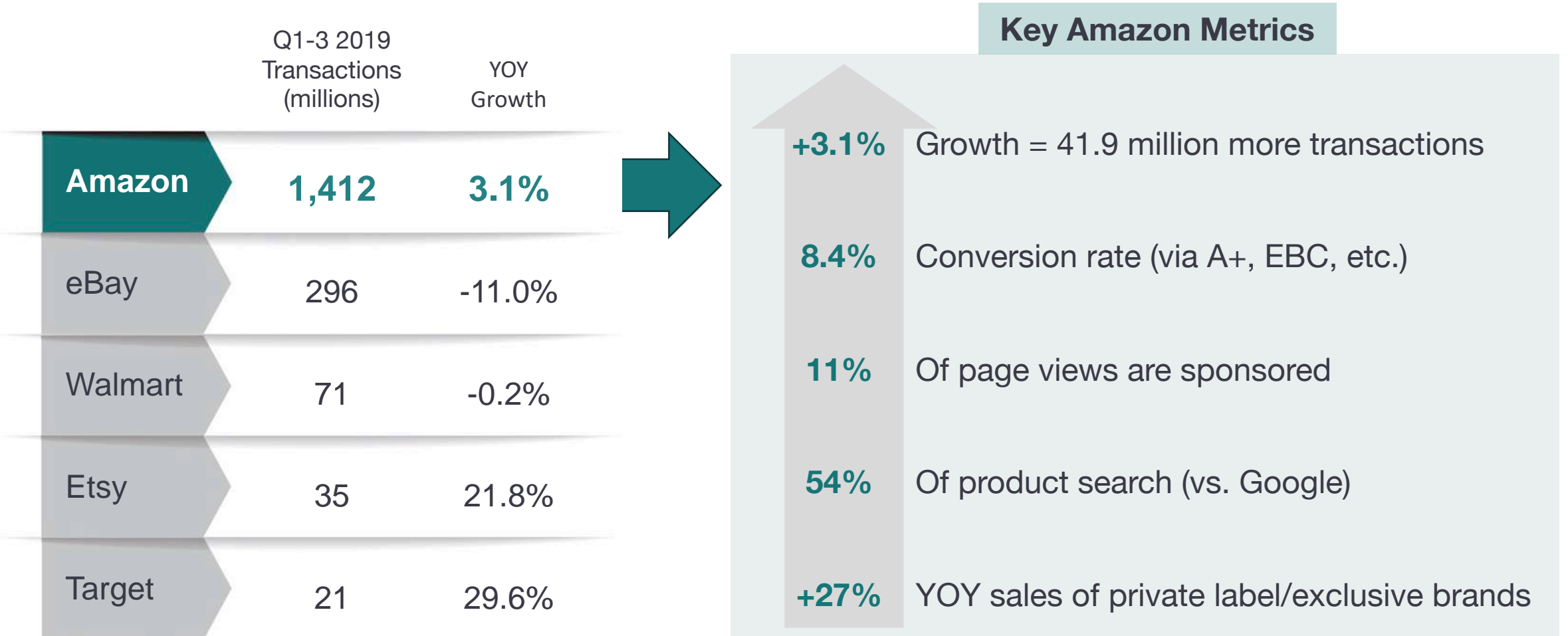


Five Retailers Consistently Top Our eCommerce Rankings

	Q1-3 2019 Transactions (millions)	YOY Growth
Amazon	1,412	3.1%
eBay	296	-11.0%
Walmart	71	-0.2%
Etsy	35	21.8%
Target	21	29.6%



Amazon Leveraging Multiple Strategies to Extend Its Lead



On Amazon, Big Inventory Can Fuel Pricing Pressure

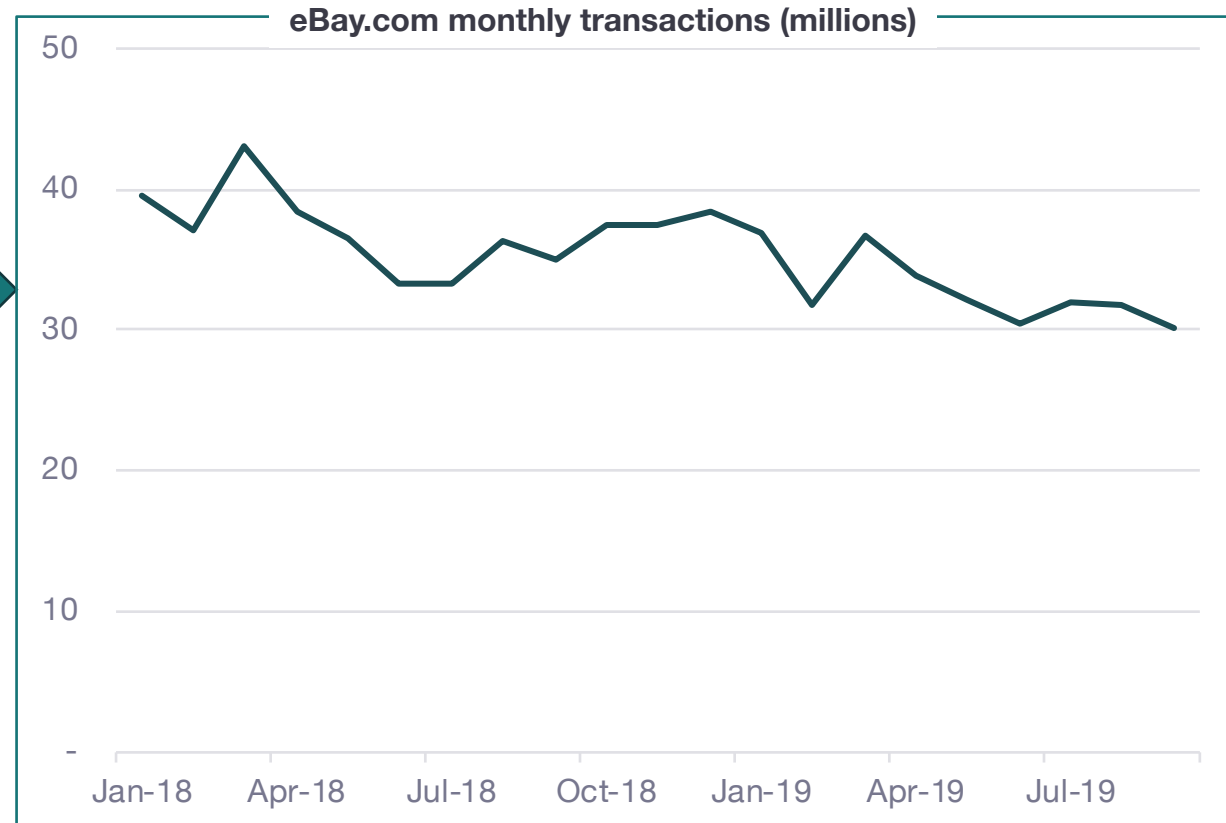
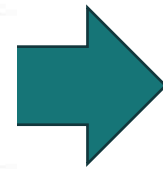


Example: Headphones (YTD 2019)

	Amazon	Walmart
# of products	35K	8K
Average price	\$37	\$70

Diverse Competitors Chipping Away at eBay

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Walmart #2 Across Many Categories; Grocery Up Strongly

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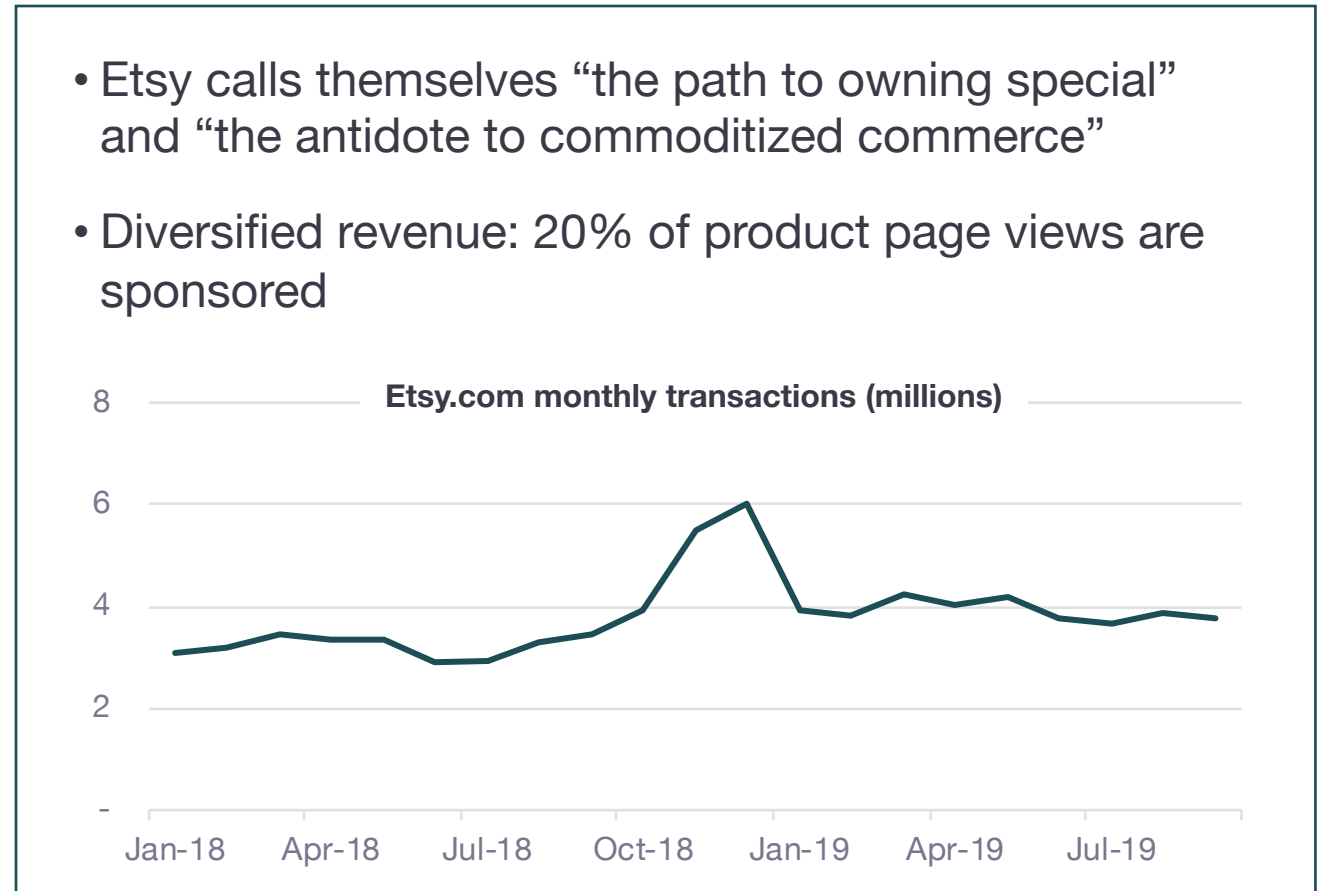
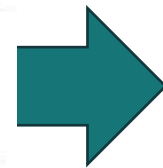
- Walmart #2 in 14 of 22 major categories*
- Walmart’s sponsored listings rising in #, but constitute <2% of product views and CVRs are falling
- Relative softness (reallocation?) in key categories (e.g., home, electronics) offset by grocery growth

Monthly Transactions

Month	Grocery.Walmart.com	PrimeNow.Amazon.com
1/2018	0.45	0.10
4/2018	0.45	0.10
7/2018	0.55	0.12
10/2018	0.65	0.15
1/2019	0.75	0.18
4/2019	0.80	0.15
7/2019	1.05	0.18

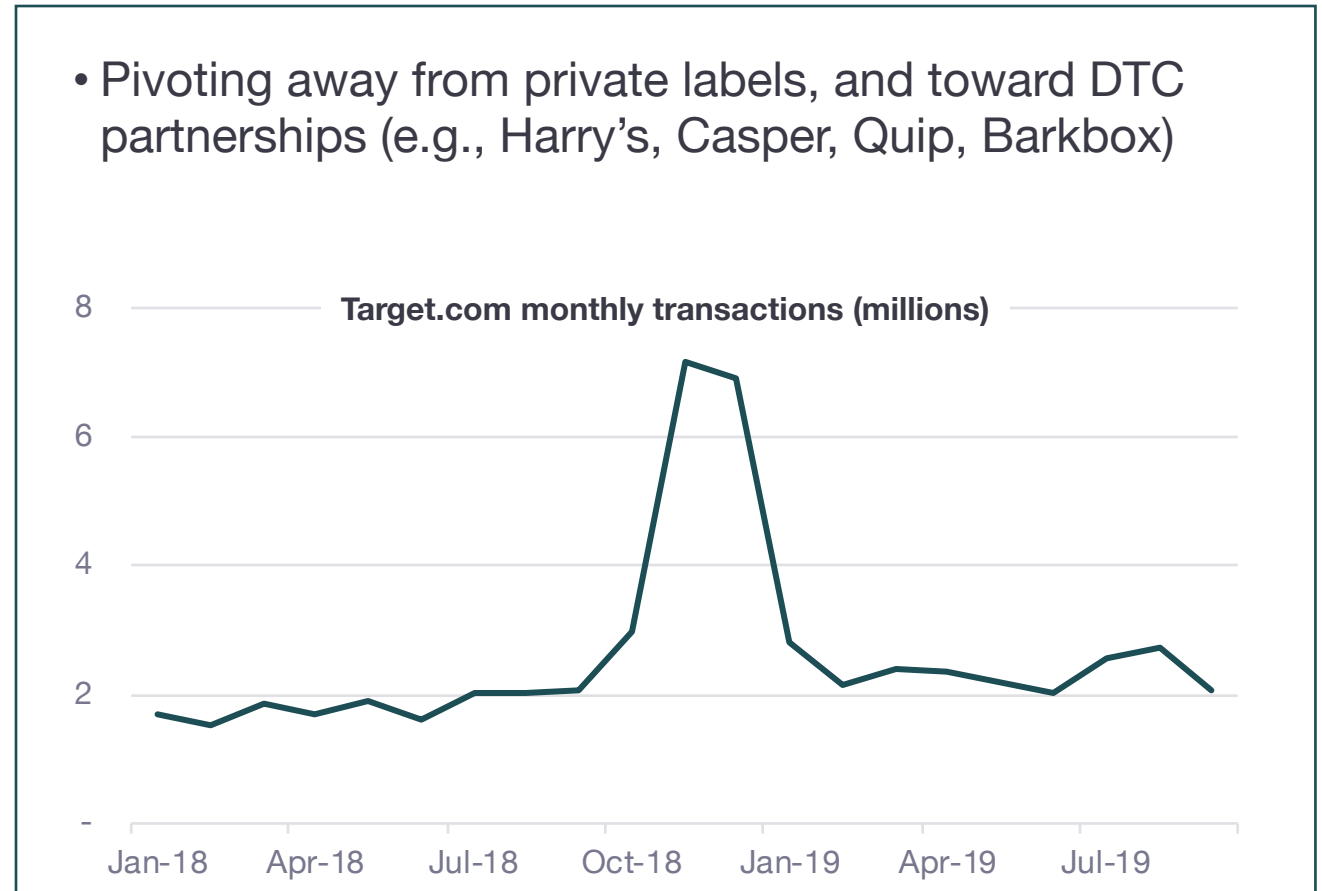
Etsy Thriving as the “Anti-Amazon”

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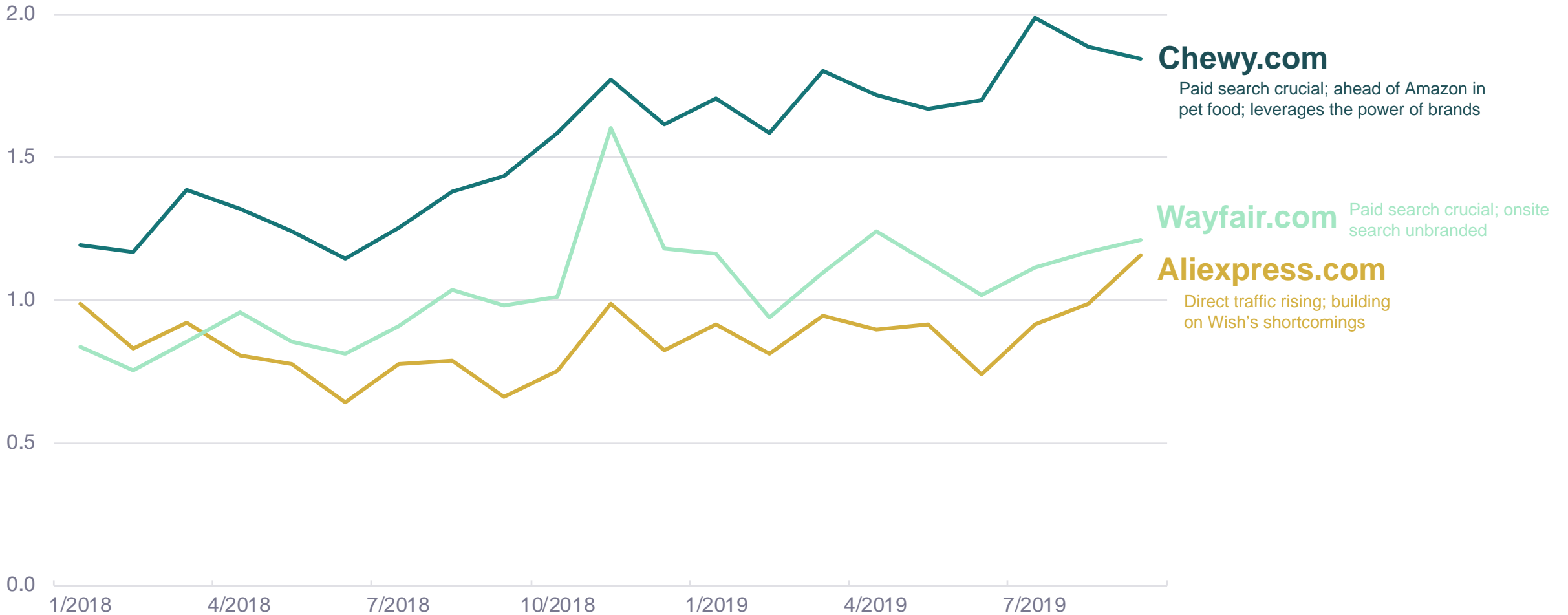
Target: Consistent Growth, Innovative Brand Partnerships

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Beyond the Big Five: Three Digital Natives on the Rise

Monthly Transactions (millions)



Chewy.com

Paid search crucial; ahead of Amazon in pet food; leverages the power of brands

Wayfair.com

Paid search crucial; onsite search unbranded

Aliexpress.com

Direct traffic rising; building on Wish's shortcomings

Some Brick-and-Mortar Specialists Deciphering Digital

Rising Retailers	Key Points
Home Depot	Strong seasonality: garden/patio in summer, tools/décor in November
Costco	Top categories are diverse: computers (holiday spike), vitamins (consistent growth), paper/plastic. Onsite search relatively branded (inc. Fitbit, Dyson, iPad).
Kohls	Strength in women's clothing; prices low and (generally) falling
Macys	Strength in women's clothing; onsite search skews relatively branded (inc. Michael Kors, Coach, Clinique, Polo, Nike)

Struggling Retailers Out-of-Step with Consumer Trends

Struggling Retailers	Key Points
Zulily	“Mom-focused” site with frequent sales and long shipping times
QVC	QVC, HSN & Zulily are all now Qurate. QVC CEO: “Yup, we’re living in a changing world.”
Zappos	Struggling to “cross the chasm” as online shoe category is increasingly competitive. Onsite search is highly branded.
JCPenney	Big holiday spike, but otherwise a double-whammy: # of transactions <u>and</u> product price continue sliding. Stuck mid-market while economy bifurcates
Victoria’s Secret	Possibly out-of-step as fashion pivots to athleisure, and beauty standards pivot toward health/fitness. Swimwear re-introduction well-received

Final Thoughts & Calls-To-Action

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Uncover search trends and top referring domains.



Track your competitive landscape.



Better inform your marketing and eCommerce teams.

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Jumpshot delivers digital intelligence from within the Internet's most valuable walled gardens.

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Questions?



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Q&A

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UPCOMING MMA WEBINARS

How to Effectively Use Location Intelligence to Improve Customer Loyalty and Market Share

Tuesday, October 29

Sponsor: Skyhook

The Journey to Achieve Multi-Touch Attribution (MTA) Success

Tuesday, November 19th

Presented by: MMA

The Top Digital Trends for 2020: What Brands and Retailers Need to Know to Thrive in the Year Ahead

Tuesday, January 14th

Sponsored by: Jumpshot

UPCOMING MMA EVENTS



The Smarties
November 6, 2019
Los Angeles, California









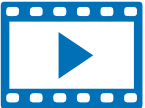



Innovate
November 6 - 7, 2019
Los Angeles, California



MMA PROGRAMS & INITIATIVES



 Currency Measurement	 Internet of Things	 Location	 Mobile Games	 Mobile Messaging
 Mobile Native Advertising	 Mobile Programmatic	 Mobile Shopper Marketing	 Mobile Video	 Privacy

Thank you!

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