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Retail Roundup

US retail ecommerce sales are expected to continue growing robustly in coming years, reaching $262.3 billion in 2013. Nearly a quarter of that spending will happen in the last two months of the year, and mobile is also contributing to fast growth in digital sales. eMarketer has curated a roundup of key trends, statistics and information relevant to retailers looking to make omnichannel marketing a reality.

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Retail Roundup Overview

Retail ecommerce sales will increase even faster this year than in 2012, eMarketer estimates. We project a rise of 16.4% in spending, to $262.3 billion, after increasing by 16.2% last year. eMarketer expects growth will slow in coming years but remain at a robust 12.8% by 2017, when US retail ecommerce sales will reach $440.0 billion.

A sizeable chunk of that digital retail spending will happen in the last two months of the year. eMarketer estimates that 23.5% of all US retail ecommerce sales will occur in November or December this year, totaling $61.8 billion. That will be up 15.1% over holiday season sales in 2012.

Retail mcommerce sales will grow even faster this year, by 68.2% to $41.7 billion as more mobile users take up smartphones and more smartphone users turn to mobile as a channel for shopping and buying. Nearly 102 million people in the US will use their smartphones to browse or research products this year, and 52.3 million will use their phones to make a purchase.

With an increased focus on mobile retail—which will jump from 16% of total retail ecommerce sales this year to an estimated 26% by 2017—retailers are focusing more on omnichannel marketing campaigns and spending more and more on digital advertising. The retail industry is expected to spend $9.4 billion on US digital advertising this year, up 14.9% over 2012 levels and accounting for 22.3% of all digital ad spending in the country—the greatest share of any industry in the country.

eMarketer estimates that around two-thirds of retail industry digital ad spending will go toward direct response formats, including classifieds and directories, email, lead generation, mobile messaging and search, while the remaining third goes toward branding-related formats like banners, rich media, sponsorships and video.

**US Retail Ecommerce Holiday Season Sales, 2008-2013**
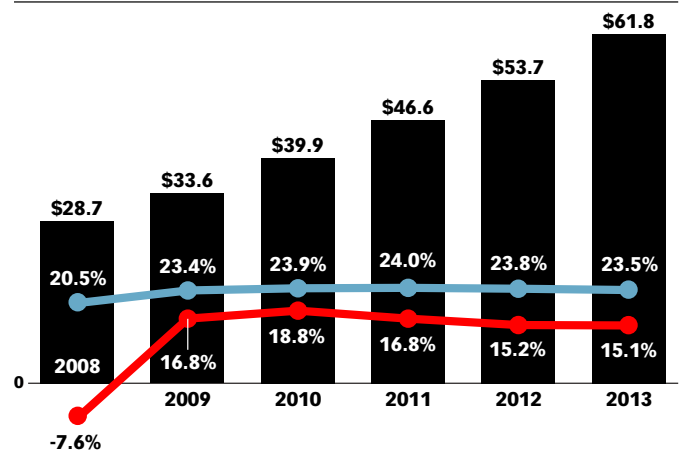
■ Retail ecommerce holiday season sales (billions)
■ % change ■ % of full year retail ecommerce sales

Note: eMarketer benchmarks its retail ecommerce sales figures against US Department of Commerce data, for which the last full year measured was 2012; includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets; sales are for Nov and Dec of each year
Source: eMarketer, Sep 2013

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US Retail Industry Digital Ad Spending, 2011-2017
billions, % of total digital ad spending and % change
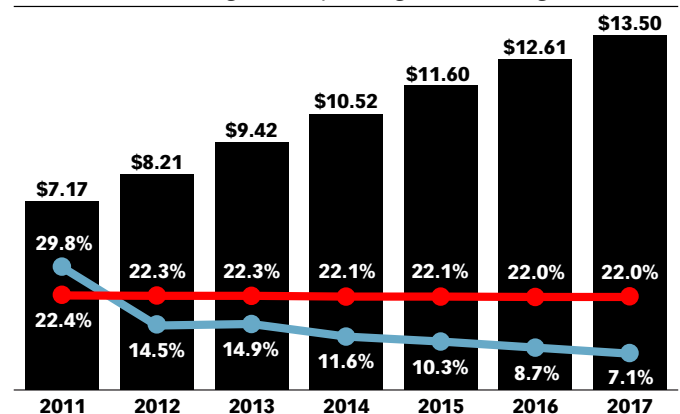
■ Digital ad spending   ■ % of total digital ad spending   ■ % change

Note: CAGR (2012-2017)=10.5%; includes advertising that appears on desktop and laptop computers as well as mobile phones and tablets, and includes all the various formats of advertising on those platforms; data through 2012 is derived from IAB/PwC data
Source: eMarketer, Aug 2013

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Mcommerce to increase its share of total ecommerce retail sales

Mobile devices account for a rapidly growing share of US retail ecommerce sales, and are expected to contribute to strong ecommerce sales growth this holiday season, according to eMarketer's latest estimates.

eMarketer projects that retail ecommerce holiday sales in the US will rise about 15% again this year, matching last year's gains. In total, US retail ecommerce sales for the holiday season—defined as November and December—are expected to reach $61.8 billion, up from $53.7 billion last year.

Mcommerce is expected to play an important part in overall digital holiday retail spending. This year, mobile devices will account for a larger-than-expected share of total US retail ecommerce sales, according to the newly revised forecast. eMarketer expects that mobile's share will reach 16% in 2013, up from our previous prediction of a 15% mcommerce share this year.

The revision comes as data sets from multiple research sources showed mcommerce as a percent of retail ecommerce sales reached record highs earlier this year. In addition, large retailers, such as Best Buy and Home Depot, continue to invest heavily in smartphones and tablets, building out their mobile app and website offerings, and increasing spending on digital advertising in an effort to drive more conversions across devices and compete with companies with strong mobile infrastructure like Amazon and eBay.

In total, eMarketer predicts retail mcommerce sales will reach $41.68 billion this year and by 2017, retail sales made on mobile devices will climb to well over $100 billion.

eMarketer believes mobile devices contribute to overall commerce sales growth in two ways, both as a driver of total sales, as more consumers make purchases on their smartphones and tablets, and, increasingly, as a shopping research tool, driving consumers into stores or back to desktops where they complete transactions.

US Retail Ecommerce Holiday Season Sales, 2011-2013
*billions and % change*
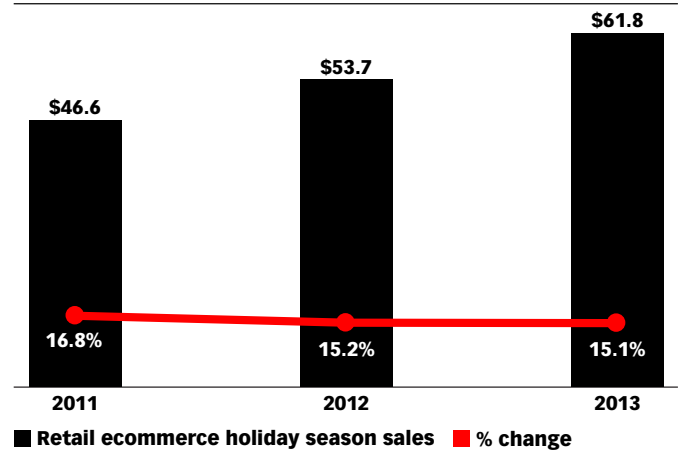
Note: eMarketer benchmarks its retail ecommerce sales figures against US Department of Commerce data, for which the last full year measured was 2012; includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets; sales are for Nov and Dec of each year
Source: eMarketer, Sep 2013

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US Retail Mcommerce Sales, 2011-2017
billions, % change and % of retail ecommerce sales
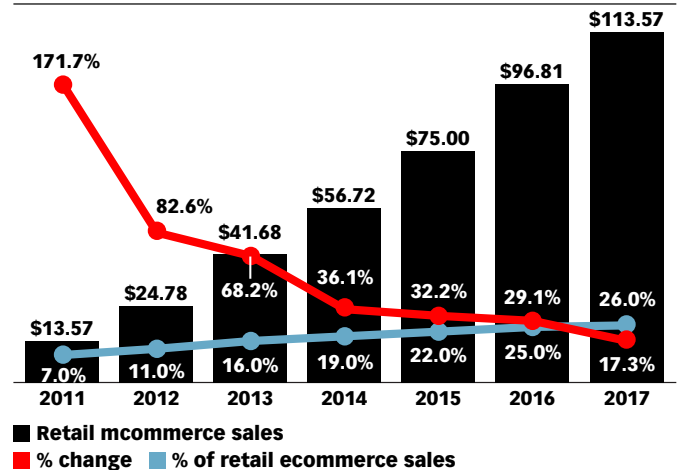
Note: includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; excludes travel and event ticket sales; includes sales on tablets
Source: eMarketer, Sep 2013

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Tablets are particularly significant for mcommerce sales growth. As more consumers have embraced these devices for lean-back browsing of potential purchases, retailers have made greater efforts to make sure their tablet retail sites and apps are particularly rich and responsive. This year, eMarketer predicts, tablet retail mcommerce sales will hit $26.05 billion, or 62.5% of US retail mcommerce sales overall. That's up from last year when tablets took a 56.2% share of mcommerce retail sales.

That will leave smartphones with a 35.0% share of mcommerce sales, a percentage that will continue shrinking throughout the forecast period as sales on tablets maintain far higher growth rates. In 2017, smartphones will account for 27.0% of retail mcommerce sales, eMarketer predicts. But actual sales dollars spent on purchases made via smartphones will continue growing at healthy double-digit rates. This year, retail sales made on smartphones will total $14.59 billion, and that figure will more than double to $30.66 billion by 2017.

For the full-year 2013, total US retail ecommerce sales are expected to reach $262.3 billion, growing by 16.4% during the year. eMarketer predicts growth in the fourth quarter will reach 15.5% over the same period last year. That's compared to Q4 2012, when the US Department of Commerce reported a retail ecommerce gain of 15.73%.

eMarketer bases it retail ecommerce, mcommerce and holiday sales figures on analysis of data from its benchmark source, the US Department of Commerce, estimates from other research firms, historical trends, reported and estimated revenues from major online retailers, consumer online buying trends, indicators of macro-level economic conditions, and eMarketer interviews with executives at retailers, brands, ecommerce vendors and other industry leaders.

In this case, eMarketer evaluated more than 300 datapoints collected from over 60 research sources—analyzing methodology, definitions and historical accuracy of each—before building its model for US retail ecommerce, mcommerce and holiday sales.

US Retail Mcommerce Sales, by Device, 2011-2017
billions and % change

|	2011	2012	2013	2014	2015	2016	2017
Tablet	$5.43	$13.93	$26.05	$37.32	$51.00	$68.06	$81.20
—% change	352.8%	156.5%	87.0%	43.3%	36.7%	33.5%	19.3%
Smartphone	$7.47	$9.91	$14.59	$18.15	$22.50	$27.11	$30.66
—% change	119.8%	32.8%	47.1%	24.4%	24.0%	20.5%	13.1%
Other mobile devices	$0.68	$0.94	$1.04	$1.25	$1.50	$1.65	$1.70
—% change	69.8%	38.8%	10.6%	19.8%	20.2%	9.7%	3.5%
Total	$13.57	$24.78	$41.68	$56.72	$75.00	$96.81	$113.57
—% change	171.7%	82.6%	68.2%	36.1%	32.2%	29.1%	17.3%

Note: includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; excludes travel and event ticket sales
Source: eMarketer, Sep 2013

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US Retail Ecommerce Sales, Q1-Q4 2013
billions and % change vs. same quarter of prior year

Q1 2013	Q2 2013	Q3 2013*	Q4 2013*
$58.1	$60.2	$60.7	$83.2
16.3%	18.4%	16.0%	15.5%
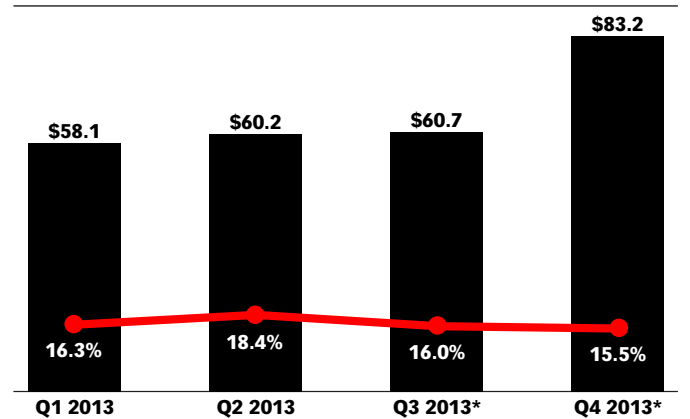
■ **Retail ecommerce sales**
■ **% change vs. same quarter of prior year**

*Note: eMarketer benchmarks its retail ecommerce sales figures against US Department of Commerce data, for which the last quarter measured was Q2 2013; includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets; *eMarketer estimate*
Source: eMarketer, Sep 2013

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Online order, in-store pickup is common

Grocers, like other retailers, are increasingly aware of both the challenges and opportunities presented by technology. A survey of grocery retailers in North America conducted by RIS News the and International Data Corporation (IDC) Retail Insights in June 2013 found that the vast majority of respondents—more than eight in 10—said that investments in technological improvements would take place over the next year.

A major area of interest for digitally minded grocers is increasing the ability of customers to interact with retailers through a variety of channels. The idea of ordering online and picking up in-store, once a rare experience, is quickly becoming the norm. The survey found that half of those polled already offered the service, and that more than half of those that didn't yet have it planned to offer it within 12 months.

More than one-third of respondents already had home delivery service for orders made online, and 12.5% expected to offer the service in a year's time.

When it came to mobile services for customers, retailers showed the greatest interest in offering technology to create mobile shopping lists; 62.5% planned to offer them this year. More than half of respondents also said they planned to offer coupons or in-store discounts via mobile devices, with the same percentage expecting to provide mobile checkout.

eMarketer projected in April that US ecommerce retail sales of food and beverage products, of which groceries are a part, would grow from $5.8 billion this year to $11 billion in 2017.

Plans for Customer-Facing Technologies According to Grocery Retailers in North America, June 2013
% of respondents

	Have now	Will deploy in next 12 months	No plans
Online order, pick up at store	50.0%	31.3%	18.8%
Large digital signs for major marketing messages	43.8%	18.8%	37.5%
Online order, home delivery	37.5%	12.5%	50.0%
Customer self-checkout	37.5%	6.3%	56.3%
In-store check-in	31.3%	25.0%	43.8%
Coupon management services	31.3%	25.0%	43.8%
Customer shopping tool kiosk	31.3%	25.0%	43.8%
Digital receipts	31.3%	25.0%	43.8%
Personalized discount	25.0%	31.3%	43.8%
Deli or pharmacy kiosk	25.0%	25.0%	50.0%
QR codes for virtual order or information	25.0%	37.5%	37.5%
Digital signs for end cap and floor display messaging	12.5%	37.5%	50.0%
In-store customer tracking	6.7%	40.0%	53.3%
Digital price signs for a majority of products	-	12.5%	87.5%

Note: numbers may not add up to 100% due to rounding
Source: RIS News and International Data Corporation (IDC) Retail Insights, "Seventh Annual Supermarket Benchmark Study" sponsored by SAS, Aug 5, 2013

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## Largest portion of social media traffic comes from Facebook

Digital resources have upended the traditional linear path-to-purchase model, with consumers now relying on a number of resources to shop for and purchase goods online. Social media has certainly played a role in that process, but research from L2 Think Tank found that little traffic was flowing from social media to retail sites.

Among all traffic sources, search engines dominated, leading 35.5% of traffic to retailers, followed by direct web browsing (33.9%), referrals (18.4%) and email (8.7%). Social media pushed 2.4% of traffic, above only display ads, which led 1.1% of visitors to retail sites.

Despite this, retailers are clearly investing resources in establishing a presence on various social media. L2 Think Tank found that the adoption by retailers of Facebook, Twitter, YouTube, Pinterest and Instagram had climbed between 2012 and 2013. Twitter, Facebook and YouTube saw almost complete adoption rates, while the use of Pinterest and Instagram was at 90%. Participation on foursquare, meanwhile, dropped to 10% from 28% last year.

Different social media platforms have had varying levels of success leading traffic to retailers, depending in large part on how various social media are used by shoppers in different retail categories. Facebook's influence was most pronounced in the watches and jewelry retail category, accounting for 76% of traffic coming from social media. YouTube's effectiveness was greatest in the beauty and skincare category, driving 27% of traffic, likely because consumers on the hunt for those products are also watching make-up and skincare "how to" videos. Pinterest, meanwhile, showed success in the home and gift category, responsible for 31% of traffic from social media.

Average Share of US Specialty Retail Website Referral Traffic from Social Networks, Feb-April 2013
% of total referral traffic

Search	35.5%
Direct	33.9%
Referrals	18.4%
Email	8.7%
2.4%	Social
1.1%	Display
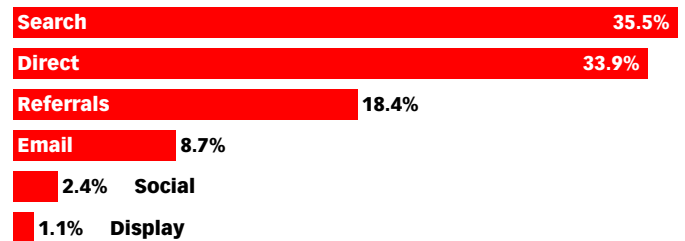
Note: n=71
Source: L2 Think Tank, "Digital IQ Index: Specialty Retail," June 25, 2013
160532 www.**eMarketer**.com

Social Networks Used by US Specialty Retailers, 2012 & 2013
% of respondents

	2012	2013
Facebook	98%	99%
YouTube	93%	99%
Pinterest	81%	90%
Instagram	75%	90%
Google+	40%	51%
Tumblr	40%	44%
Vine	-	38%
foursquare	28%	10%

Note: 2012 n=57; 2013 n=71
Source: L2 Think Tank, "Digital IQ Index: Specialty Retail," June 25, 2013
160534 www.**eMarketer**.com

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New technology is making dynamic pricing available to more consumers

Online retailers looking to gain margin advantage are increasingly using dynamic pricing: the practice of changing prices based on market conditions, consumer behavior and competitive intelligence, according to a new eMarketer report, "Dynamic Pricing: What Retailers Need to Know About Competing in Real Time."

Amazon.com has used it in various guises since the turn of the century and as the technology has become widely accessible, more retailers have adopted dynamic pricing in order to compete with the dominant pure play, undercut one another and woo the ever price-sensitive American shopper.

The ability to react in real time presents opportunities for retailers but is not without its challenges. For many, strategy and execution haven't caught up with the volume and variety of data available.

Once only available to retailers with substantial tech budgets and in-house talent, pricing intelligence tools are becoming mainstream as more third parties begin to provide affordable services.

Price-monitoring platform Dynamite Data's research showed just how marked the frequency of price changes have become. Looking at a two-week period around Thanksgiving, when retailers use the holidays as a testing ground, major retailers made more daily price changes in the 2012 Thanksgiving season than in 2011. Both Amazon and Sears manipulated prices daily on around one-quarter of their products during the holiday period last year.

Though online battles between high-profile companies like Target, Wal-Mart and Amazon make headlines, a vast number of retailers do not use pricing intelligence. In the 2013 edition of Retail Systems Research's (RSR's) annual pricing survey, just 13% of retailers around the world had fully deployed any solutions. That may sound small, but the option wasn't even included in the 2012 survey. Fifty-four percent of respondents were somewhere between exploring the idea and rolling it out. Separately, 23% cited gaining margin advantage through dynamic pricing as one of the top three business opportunities related to pricing.

Select Strategic Pricing Business Challenges According to Retailers Worldwide, 2012 & 2013
% of respondents

Increased price sensitivity of consumers
- 67%
- 57%

Increased pricing aggressiveness from competitors
- 51%
- 41%

Need to get better return on our inventory investment through pricing
- 40%

Increased price transparency—the impact of comparative price shopping
- 47%
- 33%

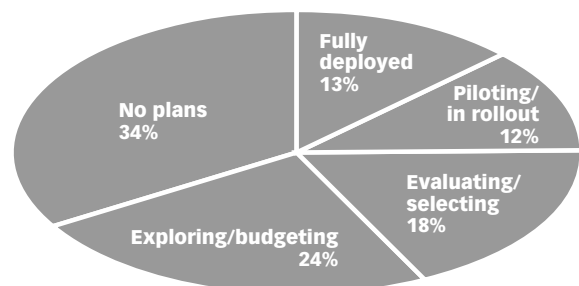**Need to protect our brand's price image**
- 42%
- 34%

■ 2012   ■ 2013

Note: respondents were asked to identify their top 3 challenges
Source: Retail Systems Research (RSR), "Tough Love: An In Depth Look at Retail Pricing Practices," April 11, 2013
156339   www.**eMarketer**.com

Pricing Intelligence Adoption Among Retailers Worldwide, April 2013
% of respondents

- Fully deployed 13%
- Piloting/in rollout 12%
- Evaluating/selecting 18%
- Exploring/budgeting 24%
- No plans 34%

Note: numbers may not add up to 100% due to rounding
Source: Retail Systems Research (RSR), "Tough Love: An In Depth Look at Retail Pricing Practices," April 11, 2013
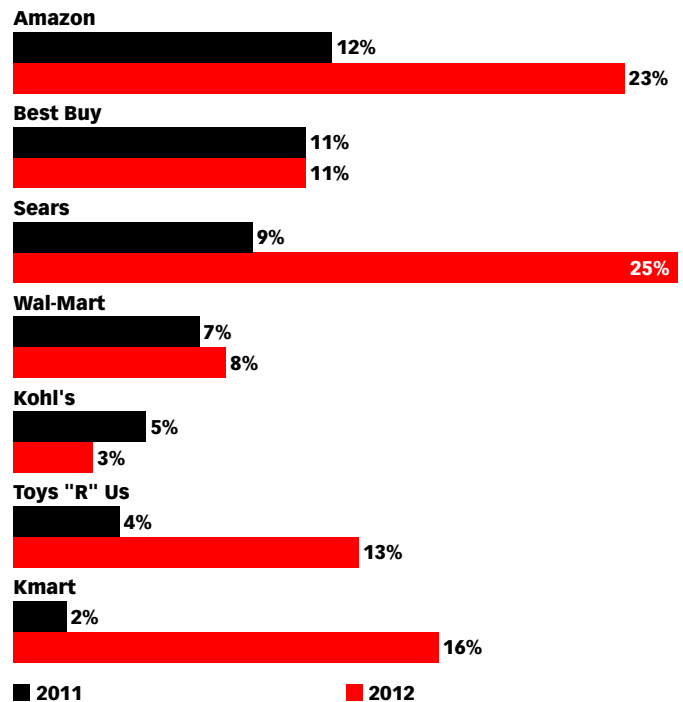156912   www.**eMarketer**.com

Even as there's huge potential for leveraging data, most retailers are stuck somewhere between the hypothetical and executable.

When RSR looked specifically at pricing, lacking all types of accurate data was a leading barrier to more effective practices for retailers worldwide. Internal resistance to change was of equal concern, and lack of talent was close behind.

Knowing as much as possible about one's own products is fundamental, and that goes beyond pricing. Kris Kubicki, co-founder and chief architect of Dynamite Data, elaborated: "It's the stock status, the availability, the ratings and the reviews of those products before you even start building a model. You've got to have everything set up before you start jumping headfirst into it."

Percent of Select US Retailers' Online Products that Changed Prices Daily During the Holiday Season*, 2011 & 2012

Amazon
- 2011: 12%
- 2012: 23%

Best Buy
- 2011: 11%
- 2012: 11%

Sears
- 2011: 9%
- 2012: 25%

Wal-Mart
- 2011: 7%
- 2012: 8%

Kohl's
- 2011: 5%
- 2012: 3%

Toys "R" Us
- 2011: 4%
- 2012: 13%

Kmart
- 2011: 2%
- 2012: 16%

■ 2011   ■ 2012

Note: *Saturday before Thanksgiving through the Friday after Cyber Monday (Nov 19-Dec 2, 2011 and Nov 17-30, 2012)
Source: Dynamite Data, April 8, 2013

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Luxury goods ecommerce rises by 25%

Concerns about the state of the global economy don't seem to be slowing the worldwide appetite for luxury goods, according to research released by business consulting firm Bain & Company in October 2012. In fact, total demand for luxury goods has remained very strong, with worldwide revenues estimated to have grown 10% in 2012.

Growth in Asia-Pacific, driven by China, is expected to be especially sharp, with sales jumping by 18%. Men, too, were making a name for themselves in the worldwide luxury goods market, accounting for an estimated 41% of purchases in 2012.
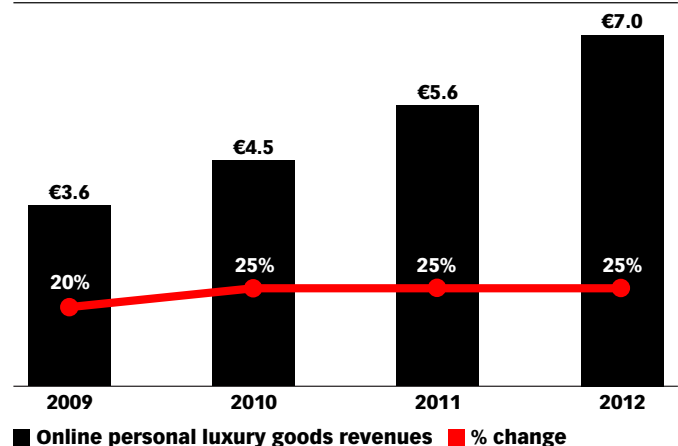
Online sales for the luxury sector were also expected to see strong growth in 2012, driven in part by increased competition among online pure plays, department stores' retail sites and brands with their own online stores. The online personal luxury goods sector was projected to see a 25% increase in 2012, maintaining the same pace of annual growth since 2010.

Online retail outlets selling items at a discount were expected to account for an increasing portion of overall sales. Full-price sales were expected to account for 67% of online luxury goods revenues in 2012, with sales of "off-price" merchandise making up the remaining 33%. In 2009, discounted luxury merchandise accounted for 25% of the luxury retail ecommerce market.

The growth of luxury ecommerce has not been lost on marketers. A January 2013 survey of worldwide luxury marketers conducted by Worldwide Business Research and ShopIgniter showed luxury marketers' interest in growing their digital visibility. Eighty-five percent of respondents planned to increase their digital marketing spending this year, with 72% planning to up the ante on social media specifically.

Online Personal Luxury Goods Revenues Worldwide, 2009-2012
billions of € and % change

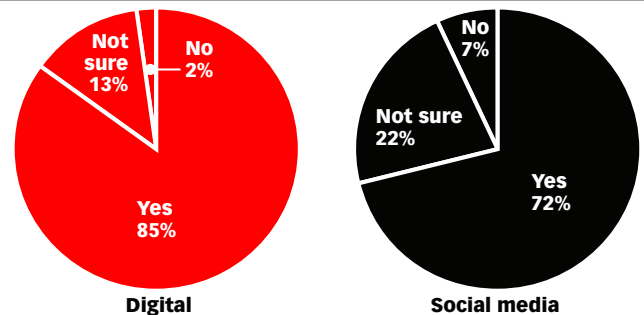Source: Bain & Company and Fondazione Altagamma, "2012 Luxury Goods Worldwide Market Study," Oct 15, 2012

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Luxury Brand Marketers Worldwide Who Plan to Increase Their Social Media and Digital* Marketing Spending in 2013
% of total

Note: numbers may not add up to 100% due to rounding; *includes email, mobile, social, etc.
Source: Worldwide Business Research and ShopIgniter, "The 2013 State of Luxury Digital Marketing," Jan 9, 2013

150189   www.**eMarketer**.com

Urban Outfitters Rolls Out Innovative Digital Tactics

Holly Devine

Executive Director of Planning
Urban Outfitters

Trendy retailer Urban Outfitters has been experimenting with technology in its stores for years, using its retail stores for additional fulfillment for online orders and rolling out mobile point-of-sale (POS) units last holiday season. Urban Outfitters ecommerce executive Holly Devine spoke with eMarketer's Christine Bittar about mobile retail tactics, online sales and the upcoming trends in ecommerce.

eMarketer: Urban Outfitters is one of the more advanced retailers with its use of technology, especially mobile technology. What insights have you gleaned over the recent selling seasons that you'd like to use in your business going forward?

Holly Devine: I think initially people thought of smartphones as utilitarian, but that's not the case. They're not simply time killers—they're engaging and offer inspiration.

Mobile has two slightly different definitions—the smartphone and the tablet—and we want our customers to have appropriate interactive experiences on either device. Old-school thinking would have meant scaling down desktop functionality to a mobile device. Now, however, our approach to design and functionality means tailoring to a device—instead of merely scaling down.

"Consumers' expectations are much different than two years ago. Amazon.com is great at fulfillment—and we aspire to be Amazon."

eMarketer: Are there aspects of your mobile presence you would like to change, and are there changes you have recently instituted?

Devine: We think in terms of two things: aesthetics and the utilitarian parts of the mobile experience, which would be rudimentary functionxs like sorting, checkout, payment options and form fields. On those functions we'll think about whether something is working equally well for a new customer as well as an engaged, hyperactive customer.

Consumers' expectations are much different than two years ago. Amazon.com is great at fulfillment—and we aspire to be Amazon. We're not Amazon, of course, but we are thinking about how to get toward that standard.

As for enhancements, we're in the process of making fundamental changes to both our app and mobile web, and should have PayPal enabled by the end of the year so that the mobile buyer will be able to pay with PayPal.

eMarketer: Is there a priority on smartphone or tablet?

Devine: We're trying to do it with both because, honestly, both of them are somewhat equal in their meaningfulness to the percentage of sales they represent. Still, there are many more sessions and much more engagement on smartphones, although tablet traffic and engagement is growing—just not as fast as on a smartphone.

eMarketer: You've been investing heavily in POS systems, including mobile POS. Where is that most helpful, and what insights have you gleaned from using those mobile systems?

Devine: We use mobile POS to get to customers wherever they might be in the store, and also during peak periods so customers don't have to wait in a long line.

We'll also use the system as a way of servicing customers on the spot by, for example, finding merchandise in another color or size. That allows us to save the sale and make the best use of the inventory in the entire chain. It also allows customers who have been on our website to [see if a particular item is available at their local store]. Most of our stores in the US are fully integrated, and we're converting the rest of our Canada and Europe stores now.

eMarketer: Urban Outfitters had been talking about online order pickup at stores. Is that available at this point?

Devine: We are piloting that this fall with some of our smaller brands, but we'll more likely take a better look at it in the new year. One of the issues we have is that there are many different stores and product SKUs, and we carry a lot of products online that we may not have at a given store.

"Many of [our customers are] extremely visually engaged, which is why Instagram, Vine or some of the more visual media are much more important to us than the sites that require more reading."

Still, we'd like to be able to have store pickup of online orders in 2014 so that a customer can ship an item to a store or reserve it to pick up, rather than waiting for an item to be shipped to the home.

eMarketer: Why would customers want to pick up an online order in a store? Isn't the point of ordering so that you don't have to go to a store?

Devine: It's convenience and urgency. A lot of our customers are college students, and their dorm may not accept deliveries, or maybe there's no one at home to take a package. We want to give them the option.

Amazon has been doing it with Amazon Locker, and it gives the buyer more control. I think there are other segments of the retail industry doing this better than apparel. We've been slow to facilitate it, but we know it's important—and we're getting there.

eMarketer: You've adapted to the newer social media platforms quickly. Why does that make sense for your brand?

Devine: Our customers are at a stage in life where they're extremely curious. Many of them are very literate, but they're also extremely visually engaged, which is why Instagram, Vine or some of the more visual media are much more important to us than the sites that require more reading. Still, we know we need to be in all of these places, [including Facebook, Twitter and Tumblr], and just tailor the messaging for the social media outlet.

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