

A blurred background image showing several people, likely in a retail or office setting, looking at a large screen or display. The image is partially obscured by an orange overlay containing the title text.

The 50 Most Important E-Commerce Charts of 2014

What is the future of retail?

The way consumers discover, consider, and purchase goods has undergone enormous shifts as e-commerce, social shopping, and mobile technology have taken hold.

In this collection, experts at Percolate have curated 50 charts that analyze key trends, insights, and perspectives on e-commerce and how technology has transformed retail.

Spanning six sections: macro trends, industry focus, e-commerce deep dive, consumer behavior, path to purchase, and offline strikes back, each chart tells an important story about how the world has changed and how retailers can prepare for the future.

From the growing share of mobile commerce, to forecasted growth in digital ad spend, to the power of beacons to enable in-store analytics, this collection prepares retail brands for the chaotic world ahead.

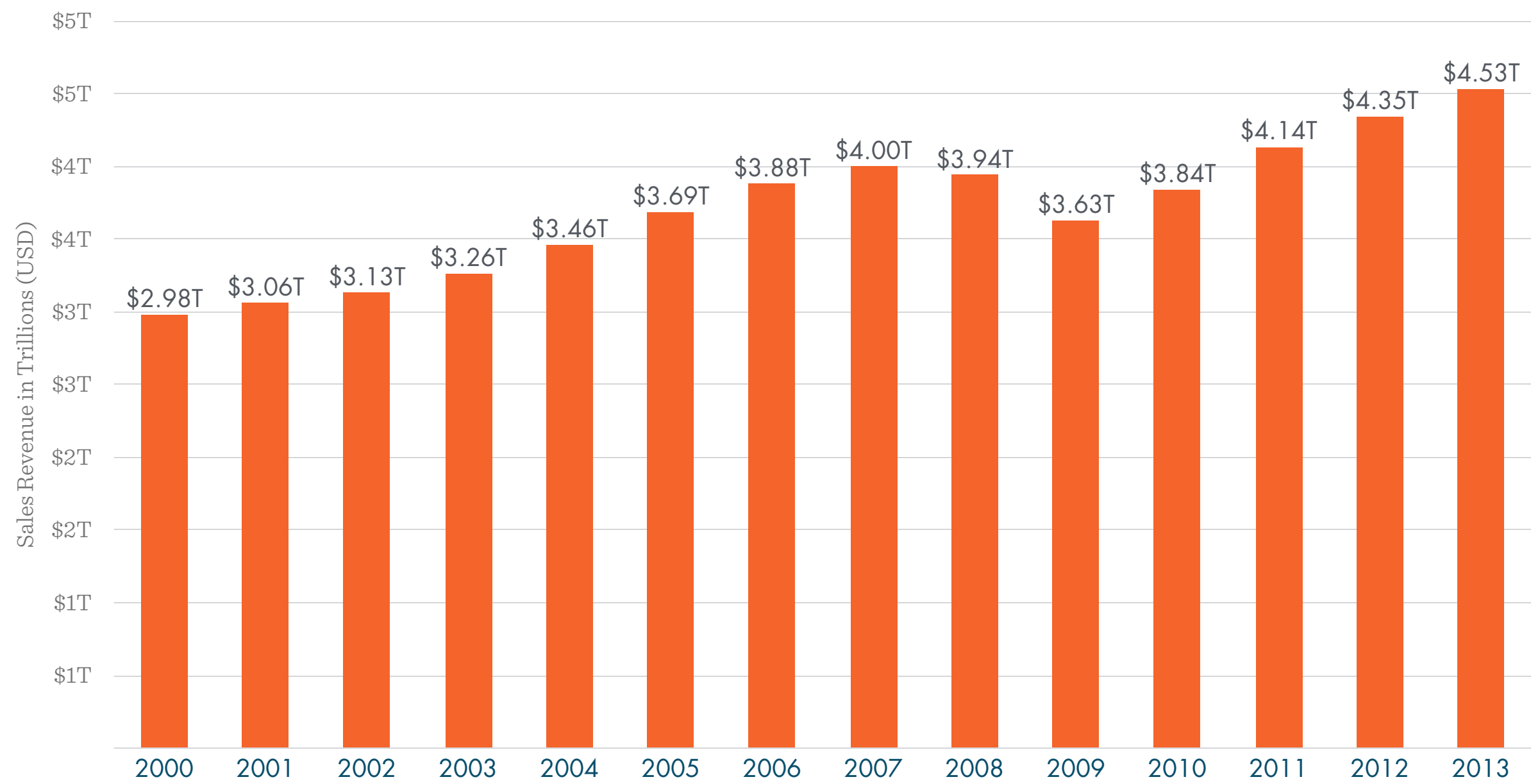
Macro Trends

Macro Trends

US Retail Sales Reached \$4.5 Trillion in 2013



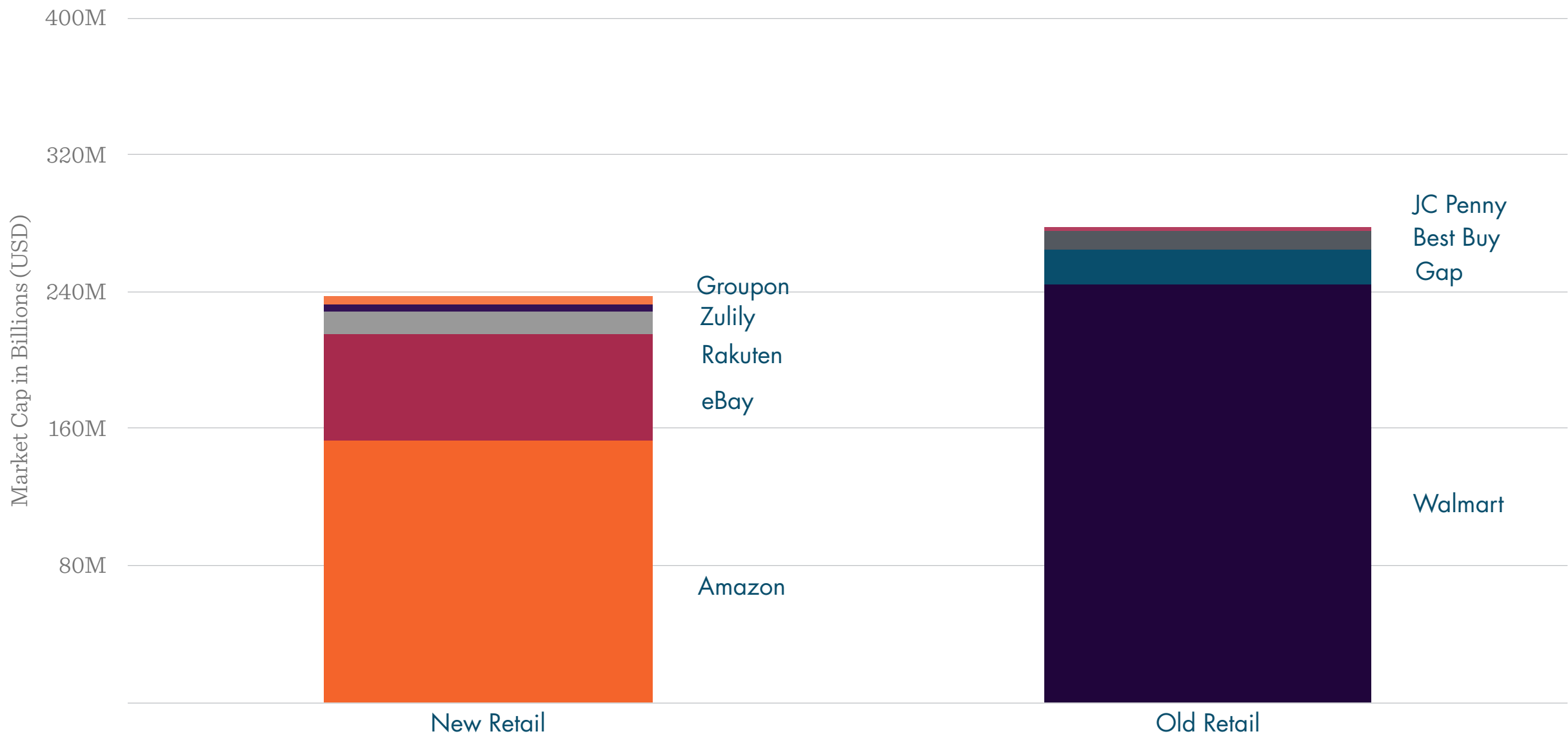
Annual retail industry sales in the United States from 2000 to 2013 (in trillion U.S. dollars)



New Retail is Approaching Size of Old Retail



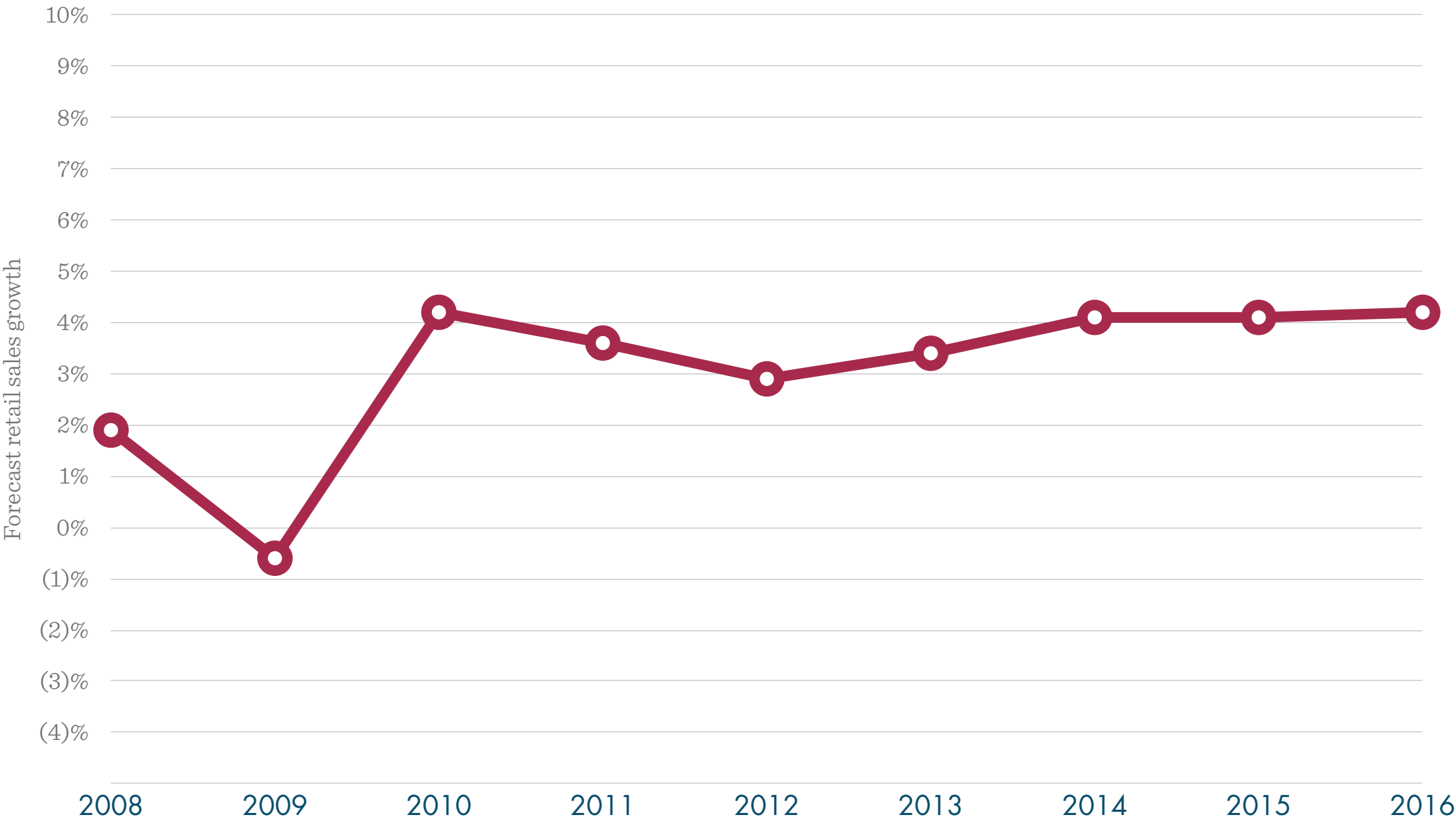
Market capitalization of selected new and old retail brands



Global Retail Sales Forecasted to Grow 4% Yr/Yr



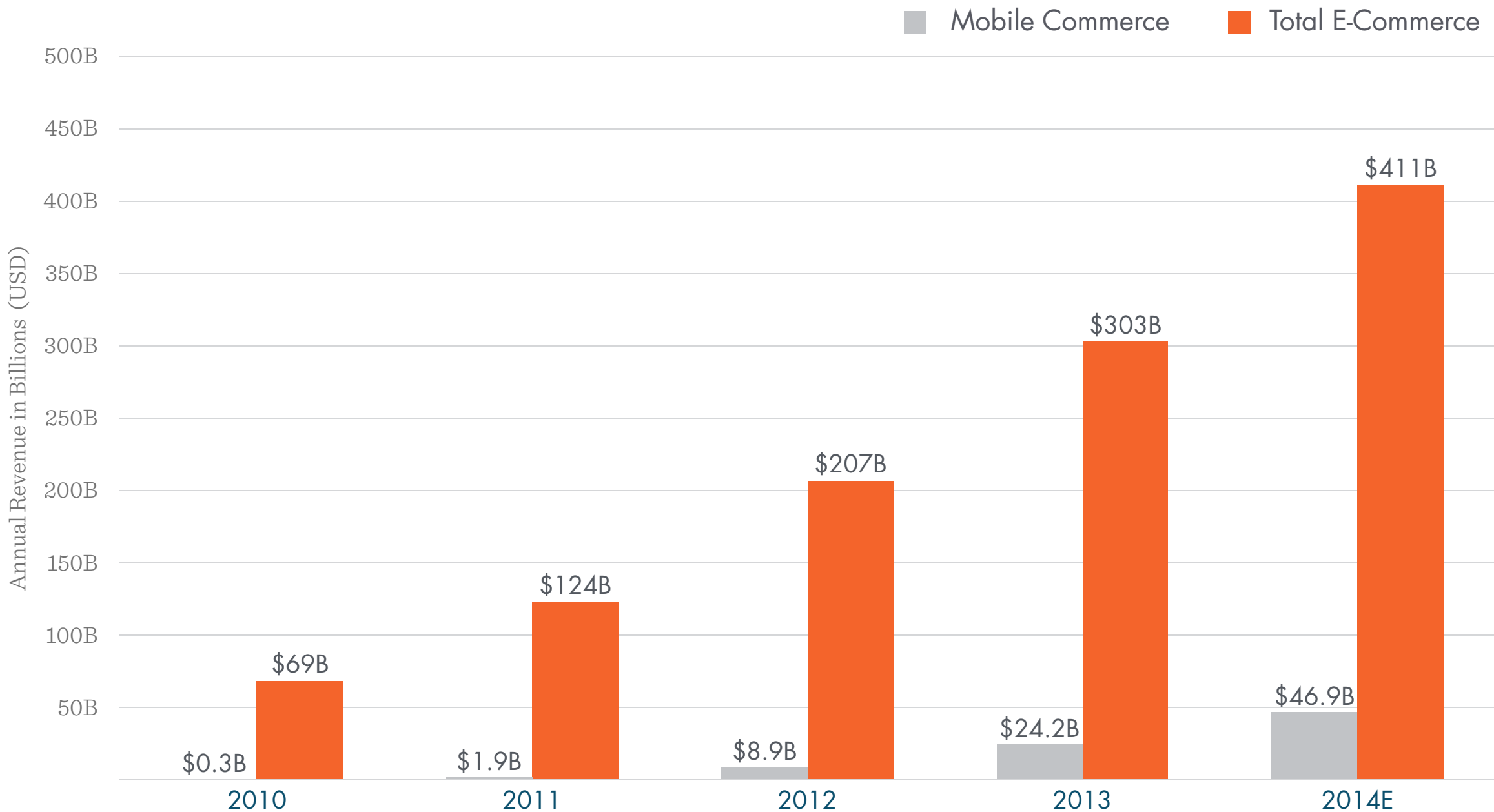
Forecast for global retail sales growth from 2008 to 2016



Chinese E-Commerce Growing at 66% Yr/Yr



Annual revenues for Chinese E-Commerce by mobile and total e-commerce

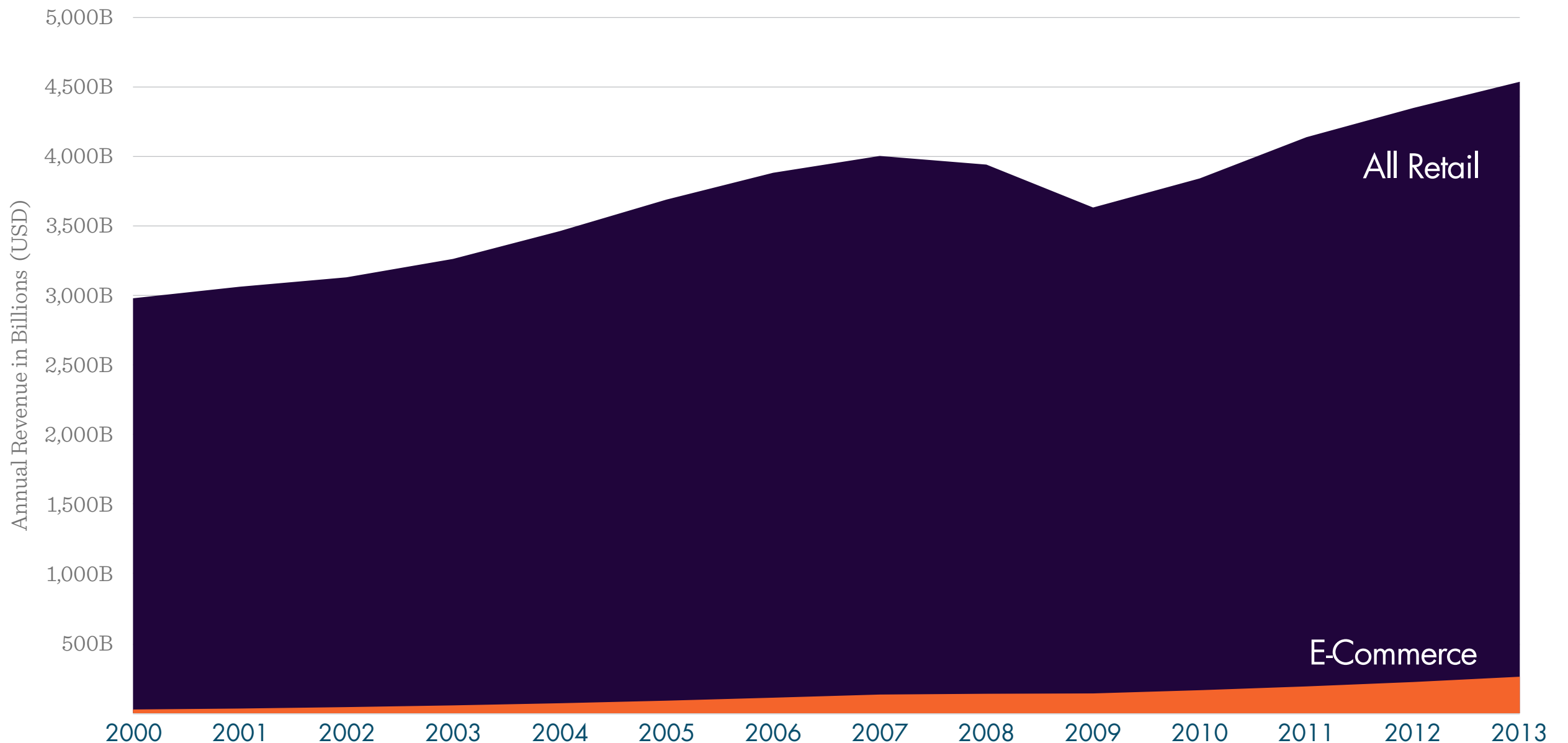


Source: Morgan Stanley, Credit Suisse, iResearch

More Than 1 in 20 Retail Dollars are Online

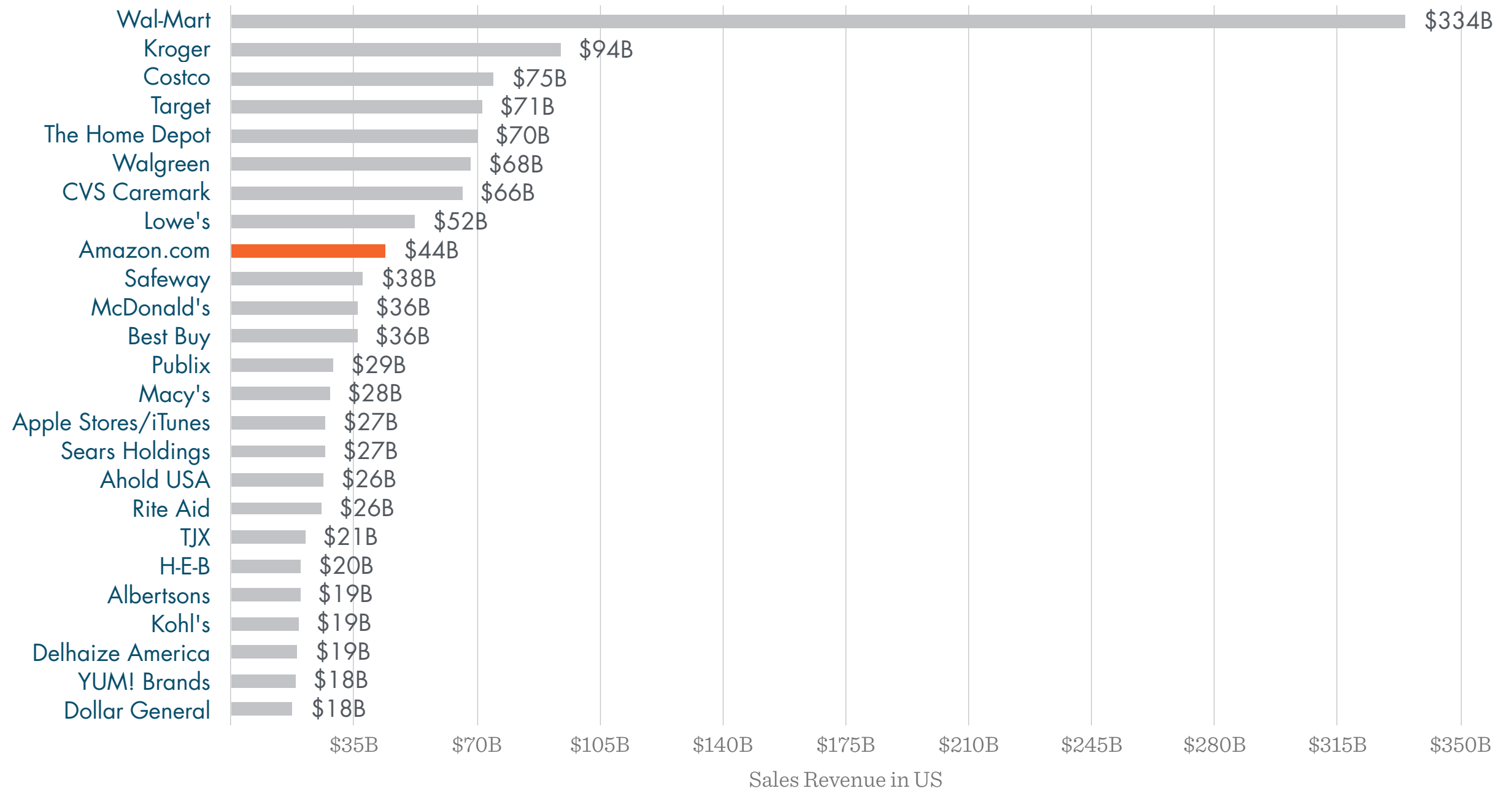


Revenues for online vs all retail in US from 2000 - 2013



E-commerce Giant Amazon is 9th Biggest US Retailer

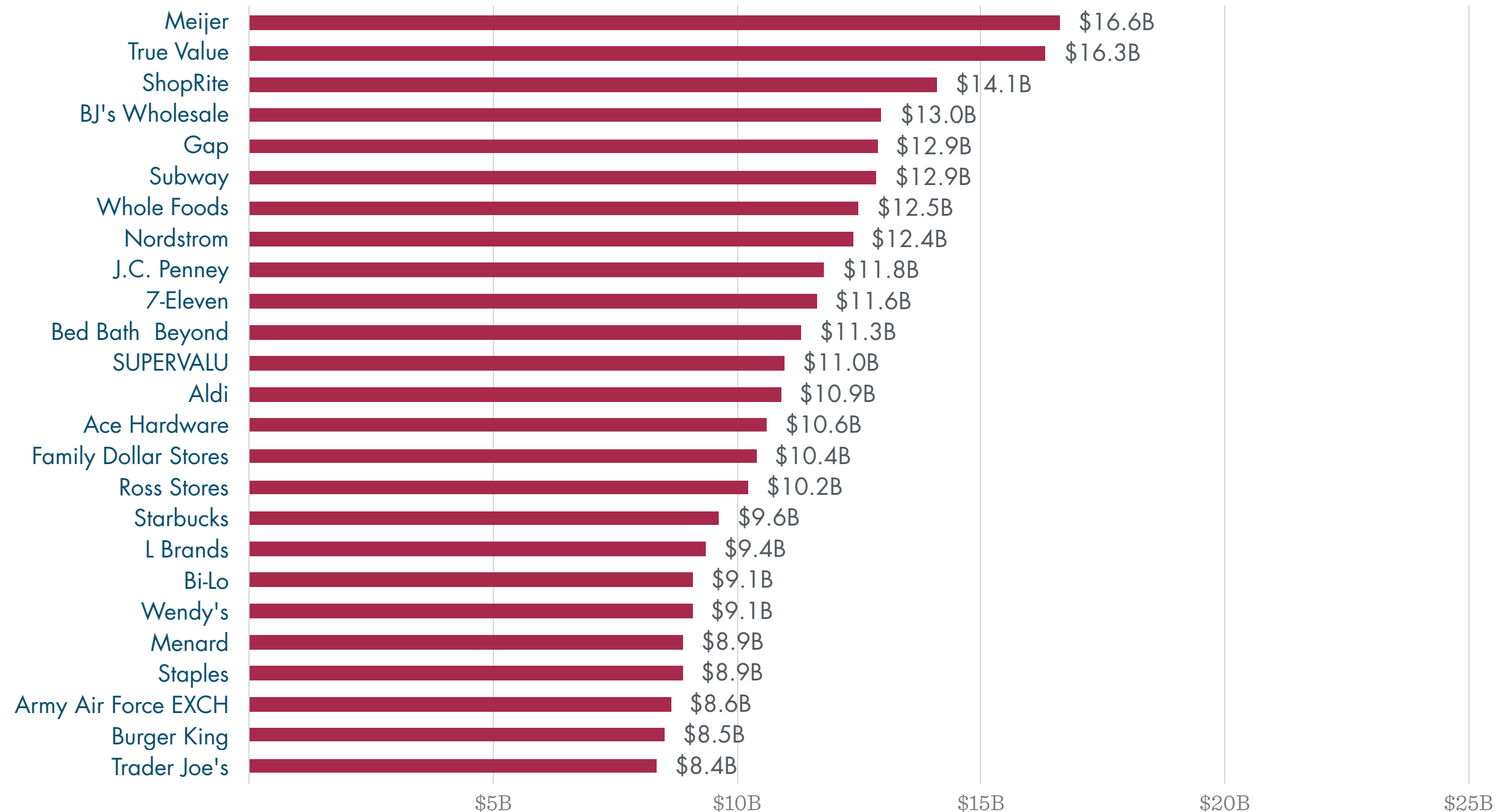
Leading 1-25 retailers based on US retail sales 2013



Value Chains Dominate Retail Sales in US

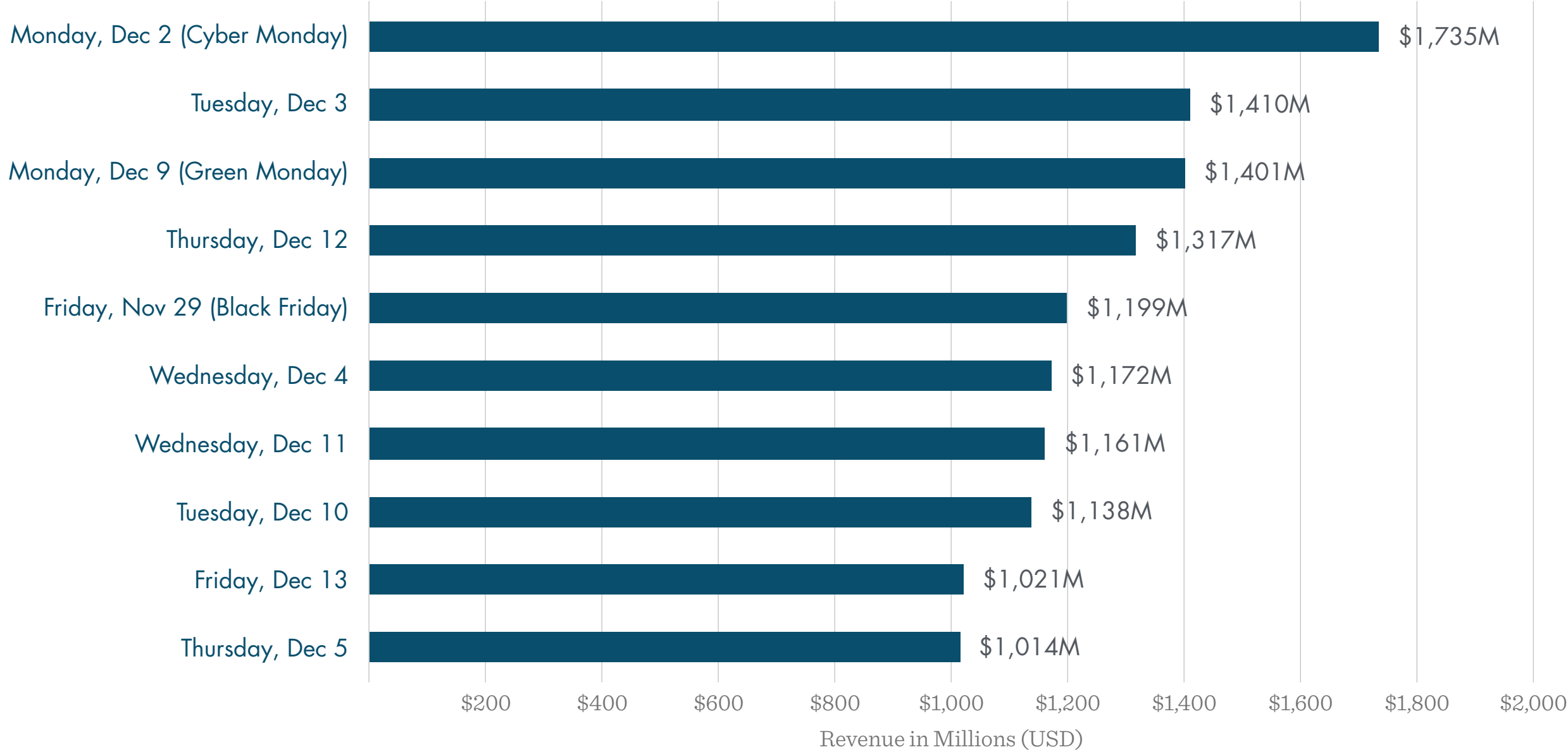


Leading 25-50 retailers based on US retail sales 2013



Cyber Monday Leads Black Friday as Top Sales Day

Highest U.S. e-commerce spending days during the 2013 holiday season



Industry Focus

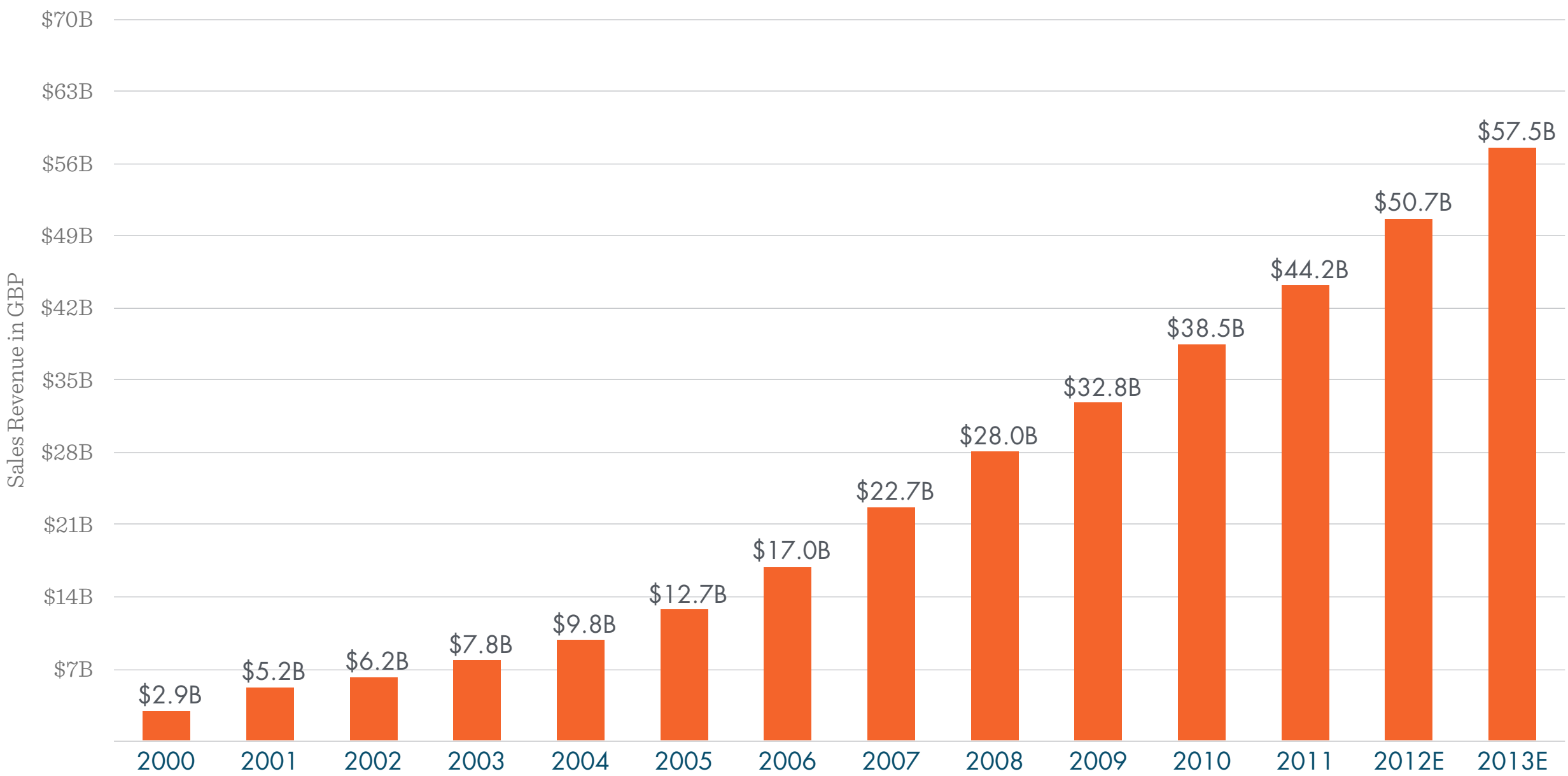
Industry Focus

Industry Focus

Industry Focus

Sporting Goods Category Has Grown 25.8% Yr/Yr

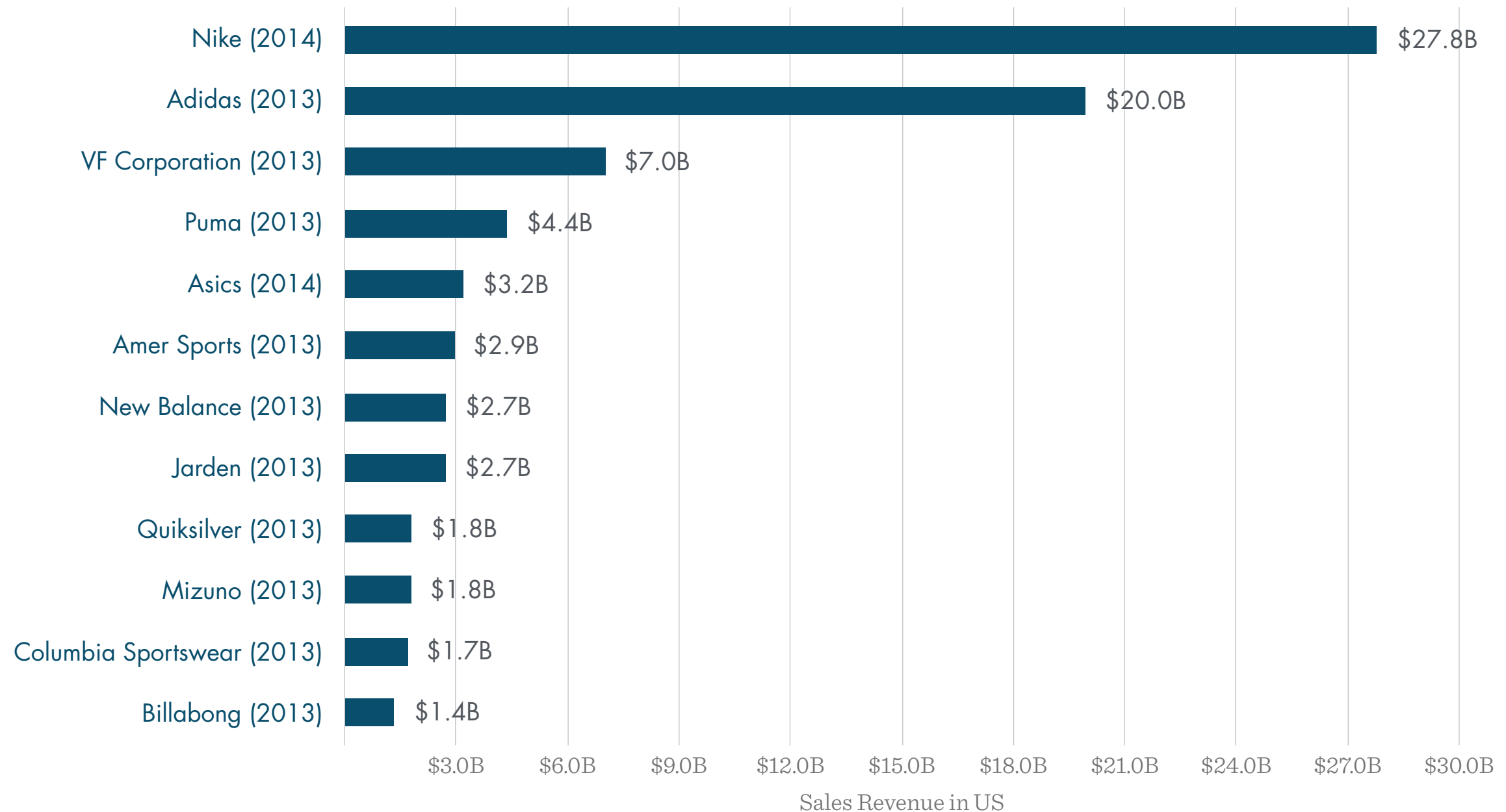
Sportswear sporting goods companies by worldwide revenue 2000 - 2013E



Nike Still Clear Leader in Sporting Goods



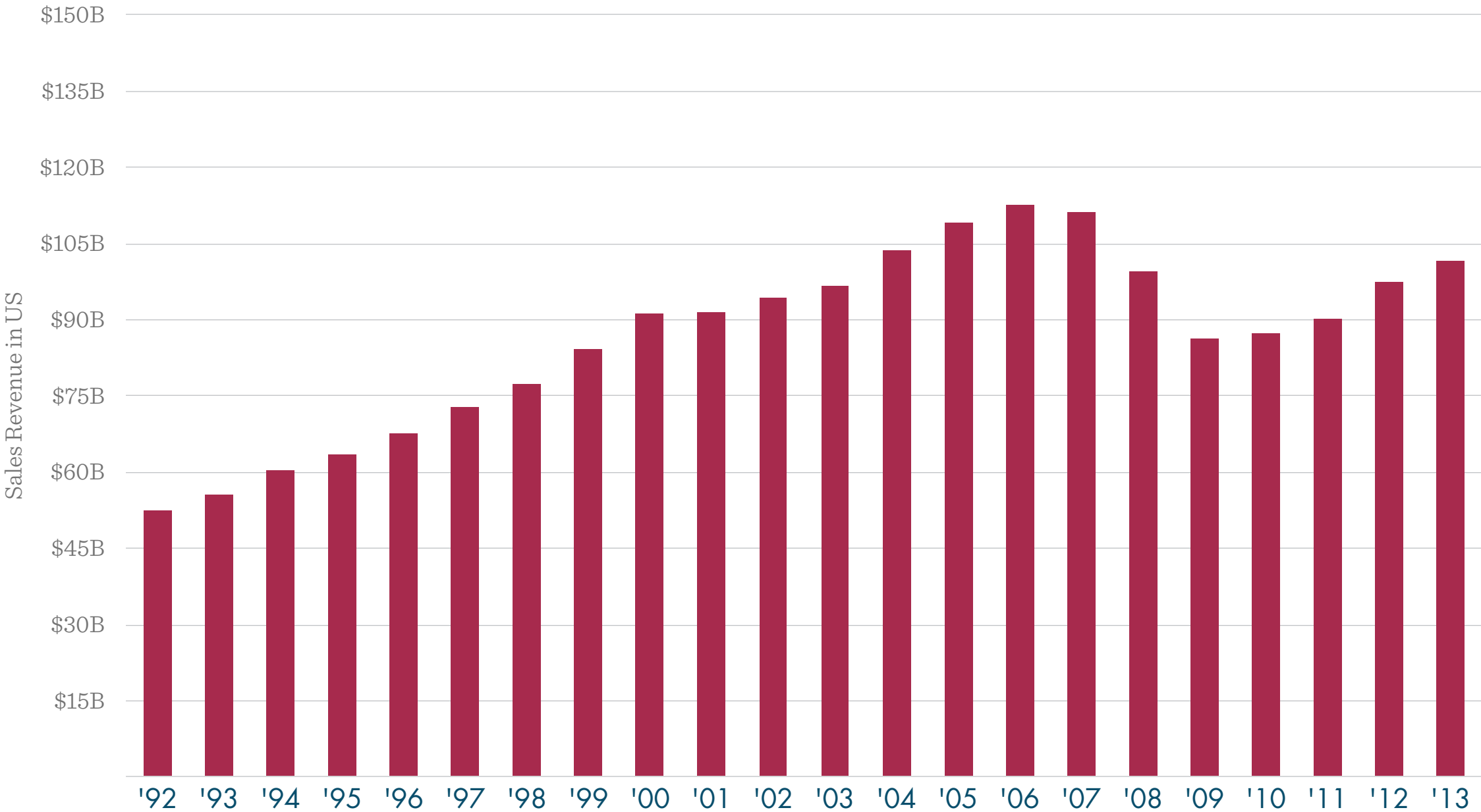
Top sporting goods companies by revenue in FY 2013



Furniture Sales Still Recovering from Recession

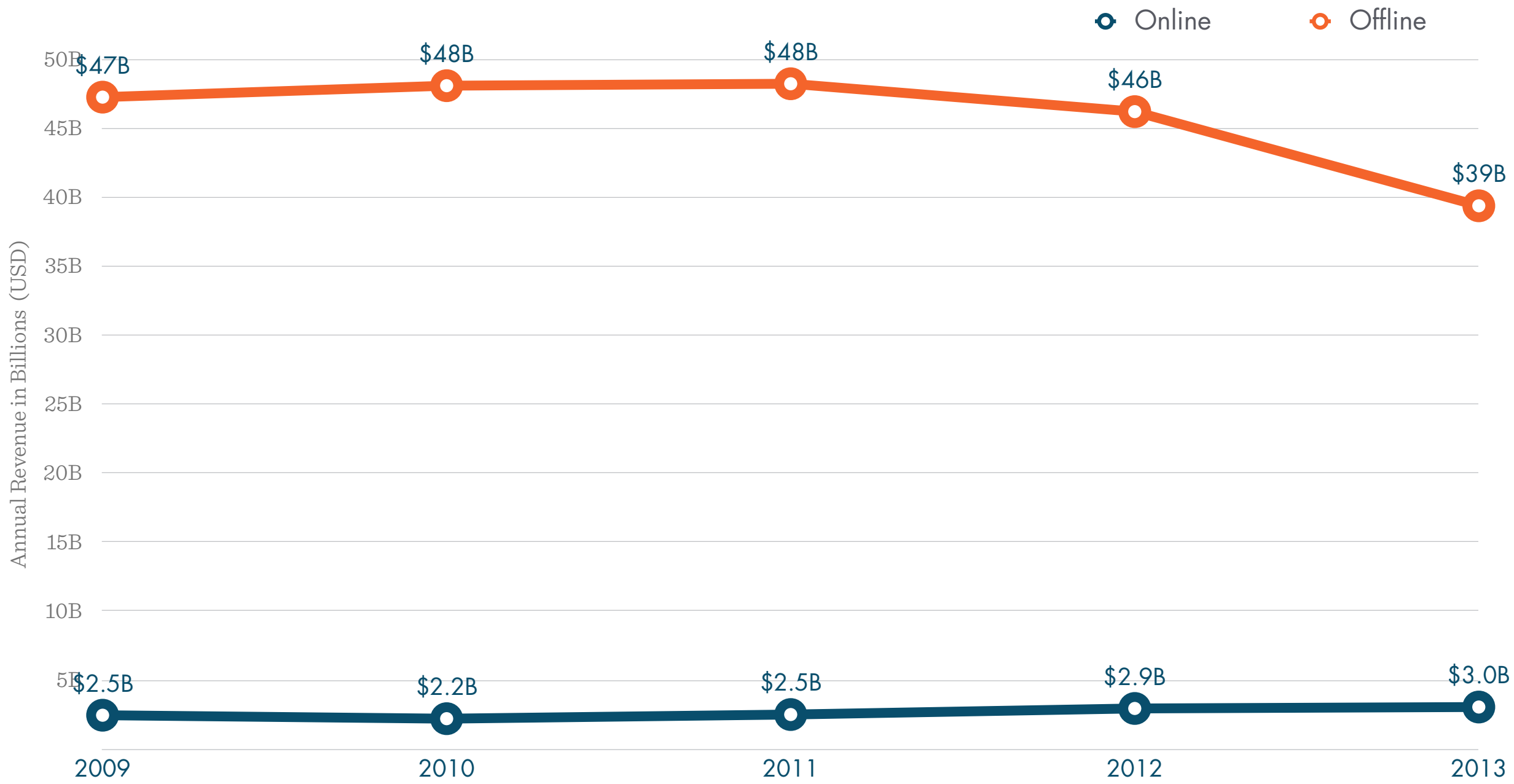


Furniture and home furnishings store sales in the U.S. 1992-2013



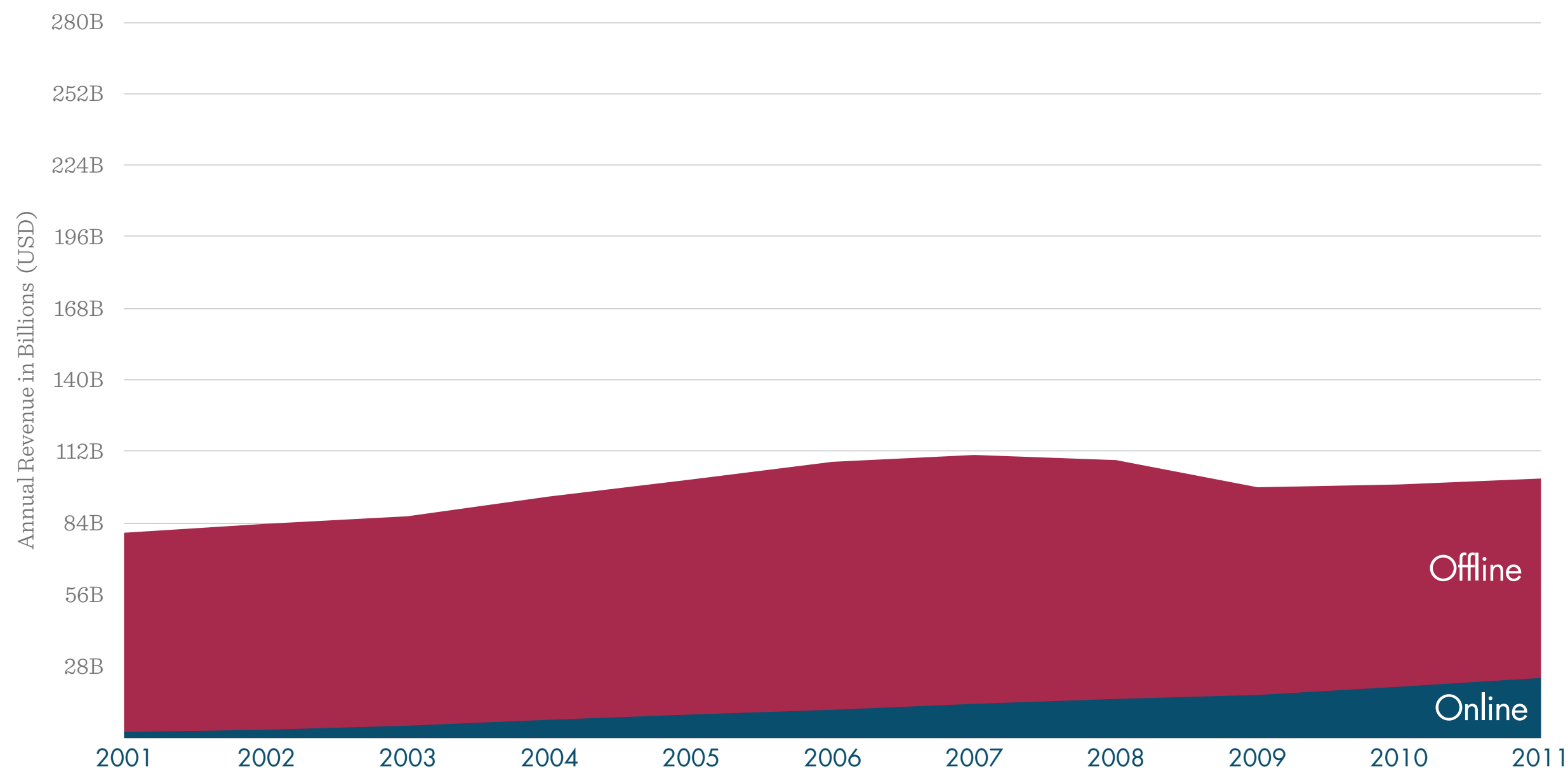
Offline Sales at Best Buy Saw Sharp Decline in 2013

Best Buy online and offline annual revenues in billions



Electronics E-Commerce Pushing Past 25% of Total

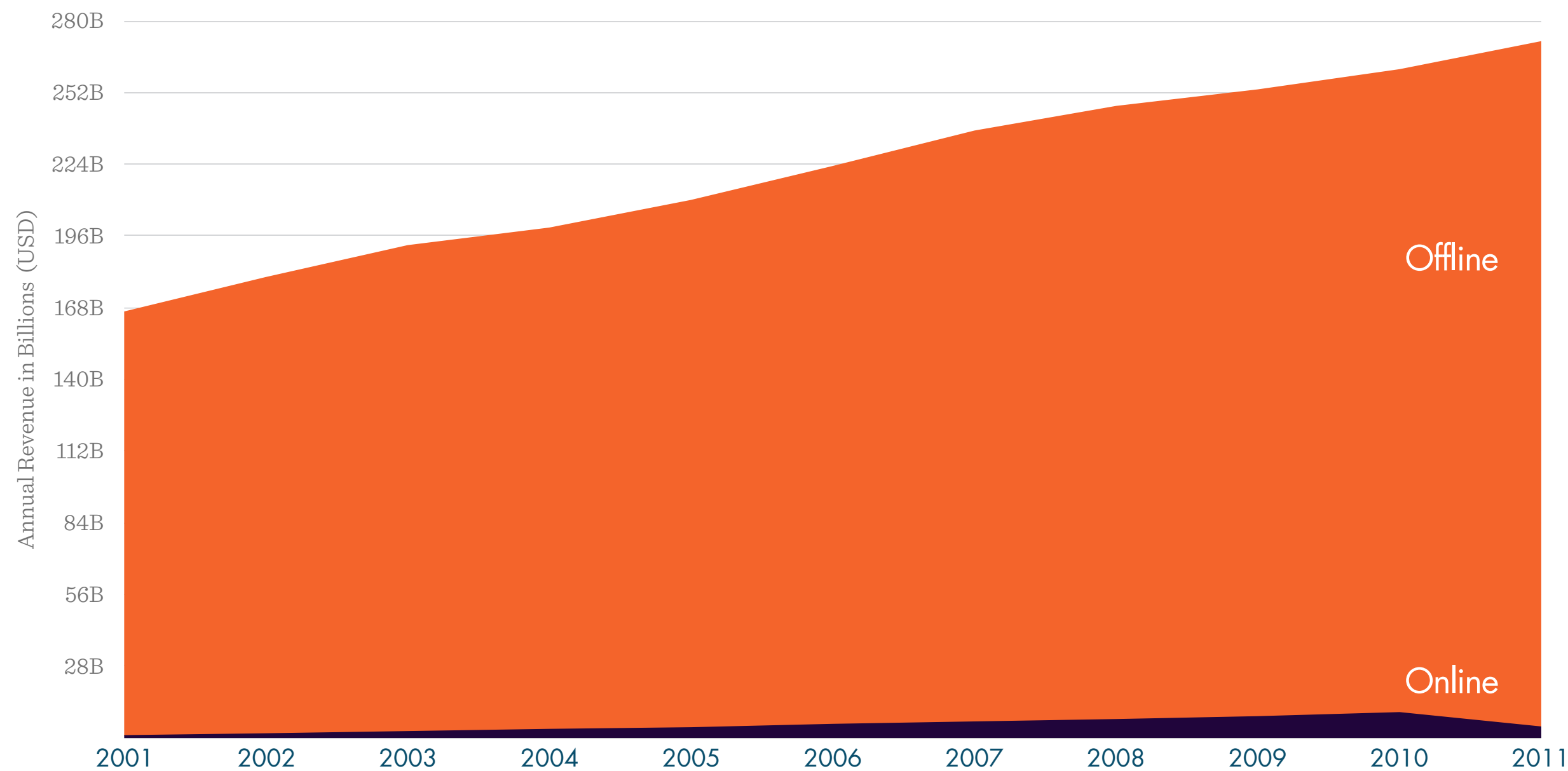
Annual revenues for electronics segment 2001-2011



Health and Personal Care Largely Still Offline



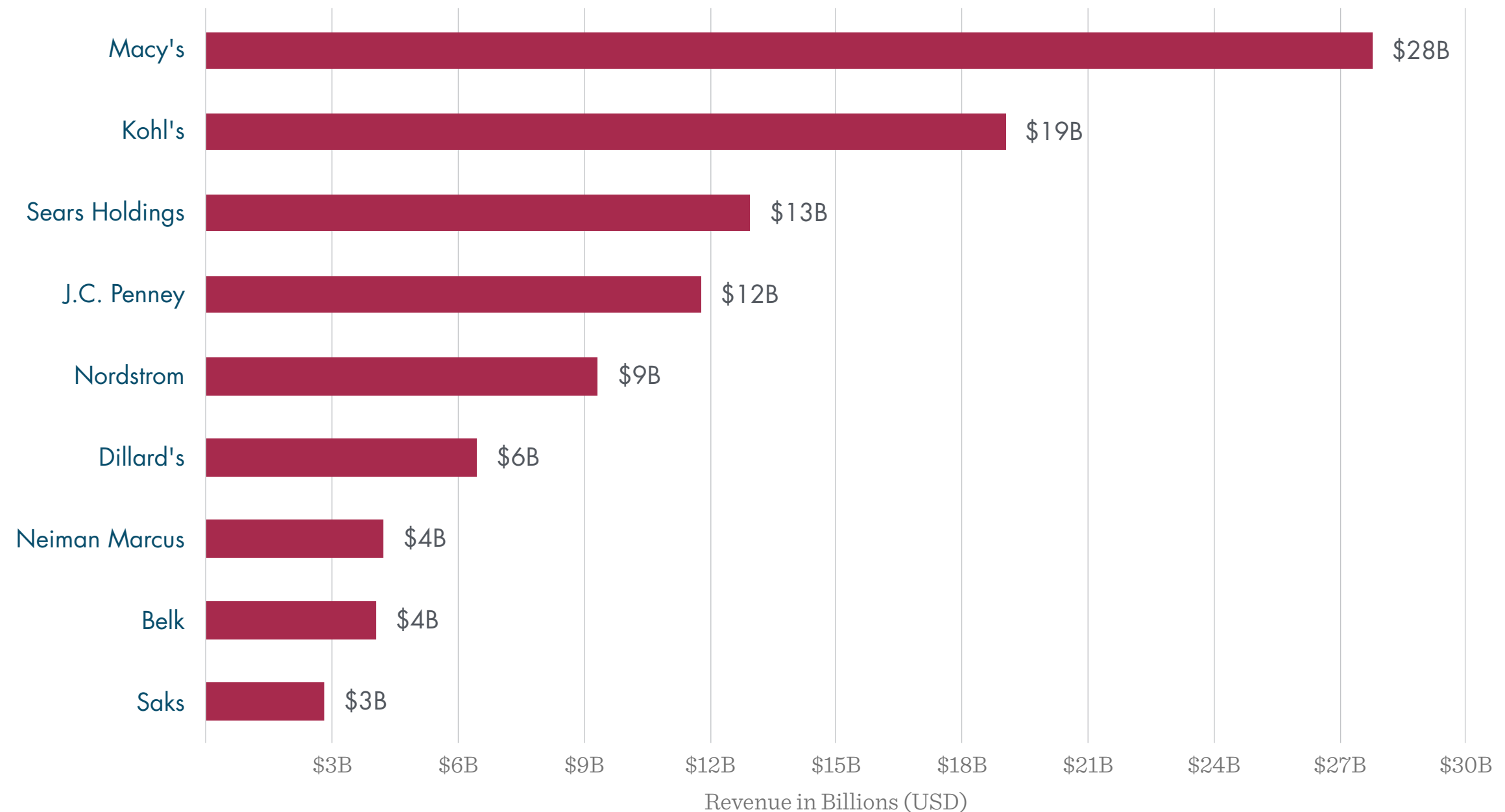
Annual revenues for health and personal care segment 2001-2011



Macy's, Kohl's and Sears Lead US Dept. Stores

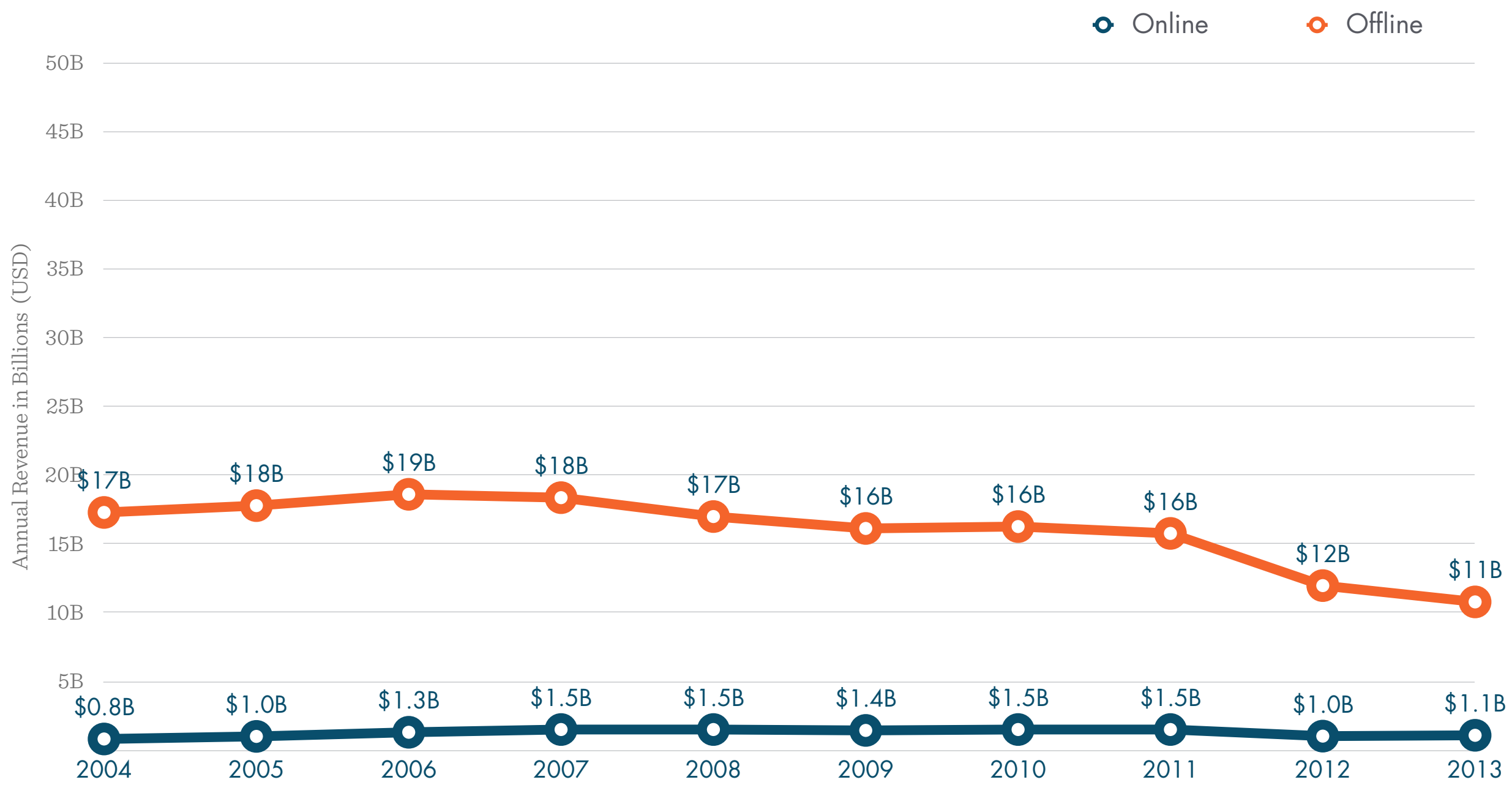


Leading department stores in the United States in 2013, based on retail sales



JC Penny Revenues Have Fallen \$8.2B Since 2013

JC Penny online and offline annual revenues in billions

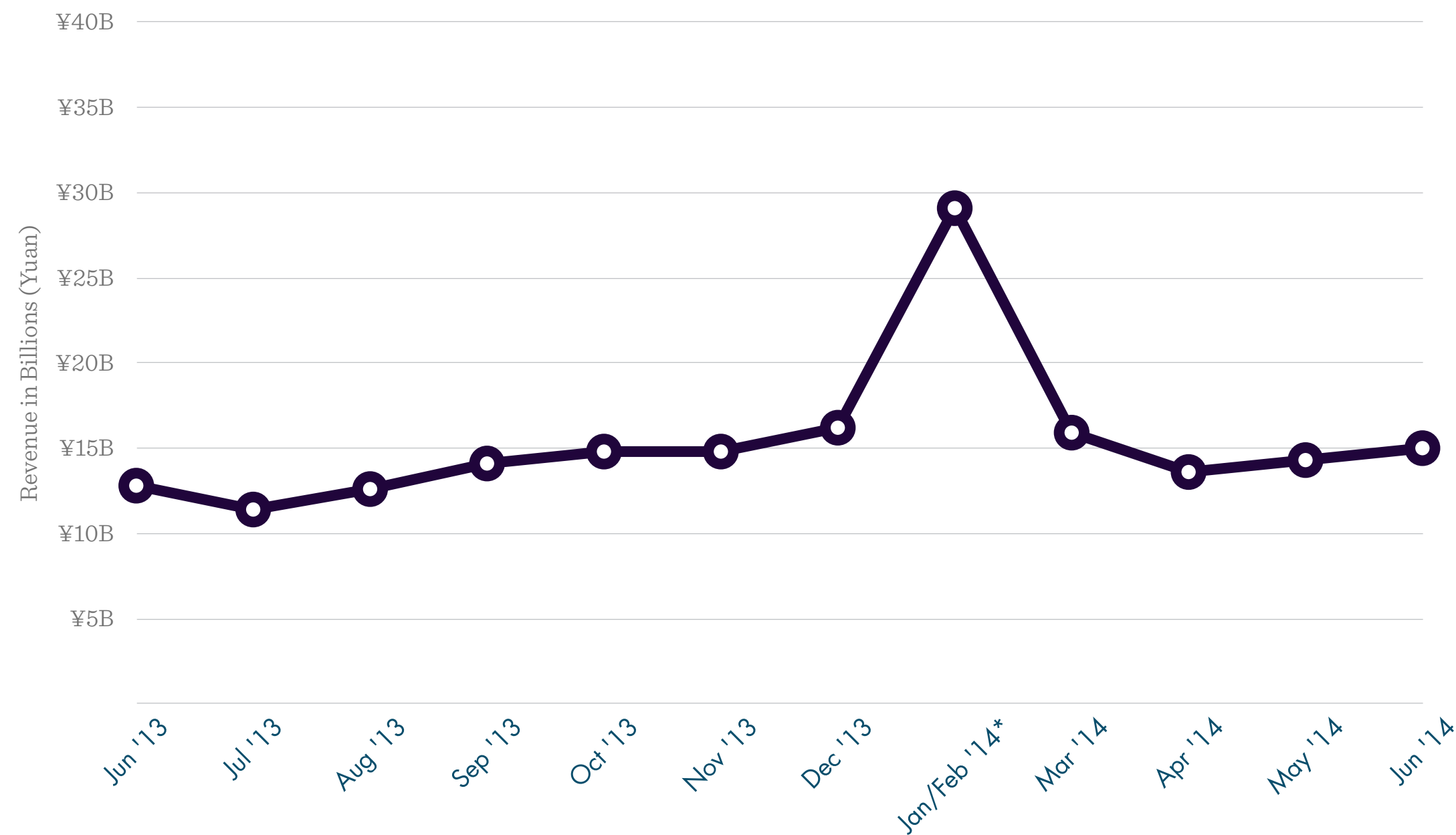


JCPenney, Internet Retailer, BI Intelligence Estimates

China Exports \$2.4B Each Month in Cosmetics

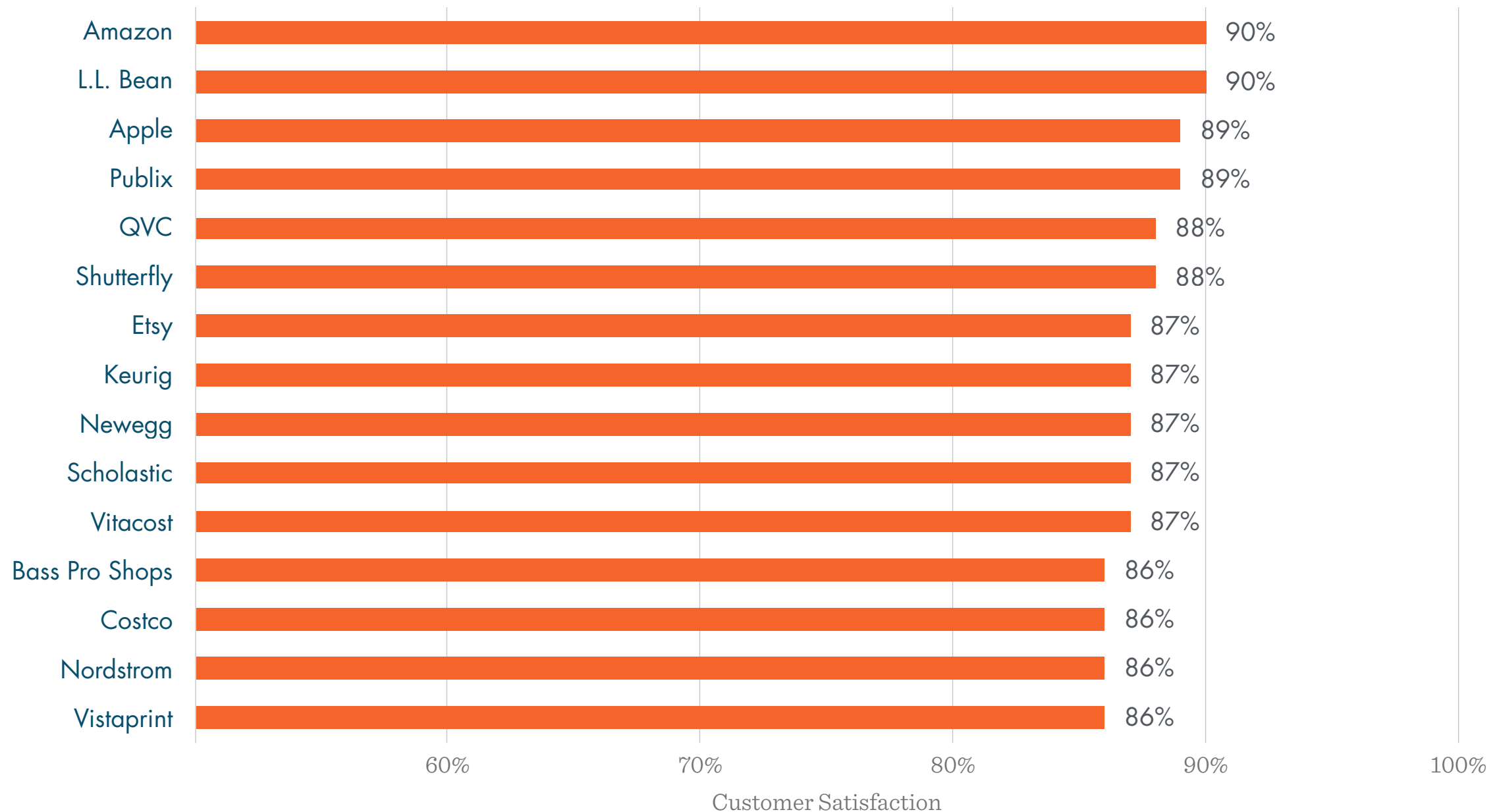


China: trade revenue of cosmetics by month June 2014



Amazon, L.L. Bean Lead in Customer Satisfaction

Top 15 major retailers ranked by customer satisfaction for 2013 holiday season

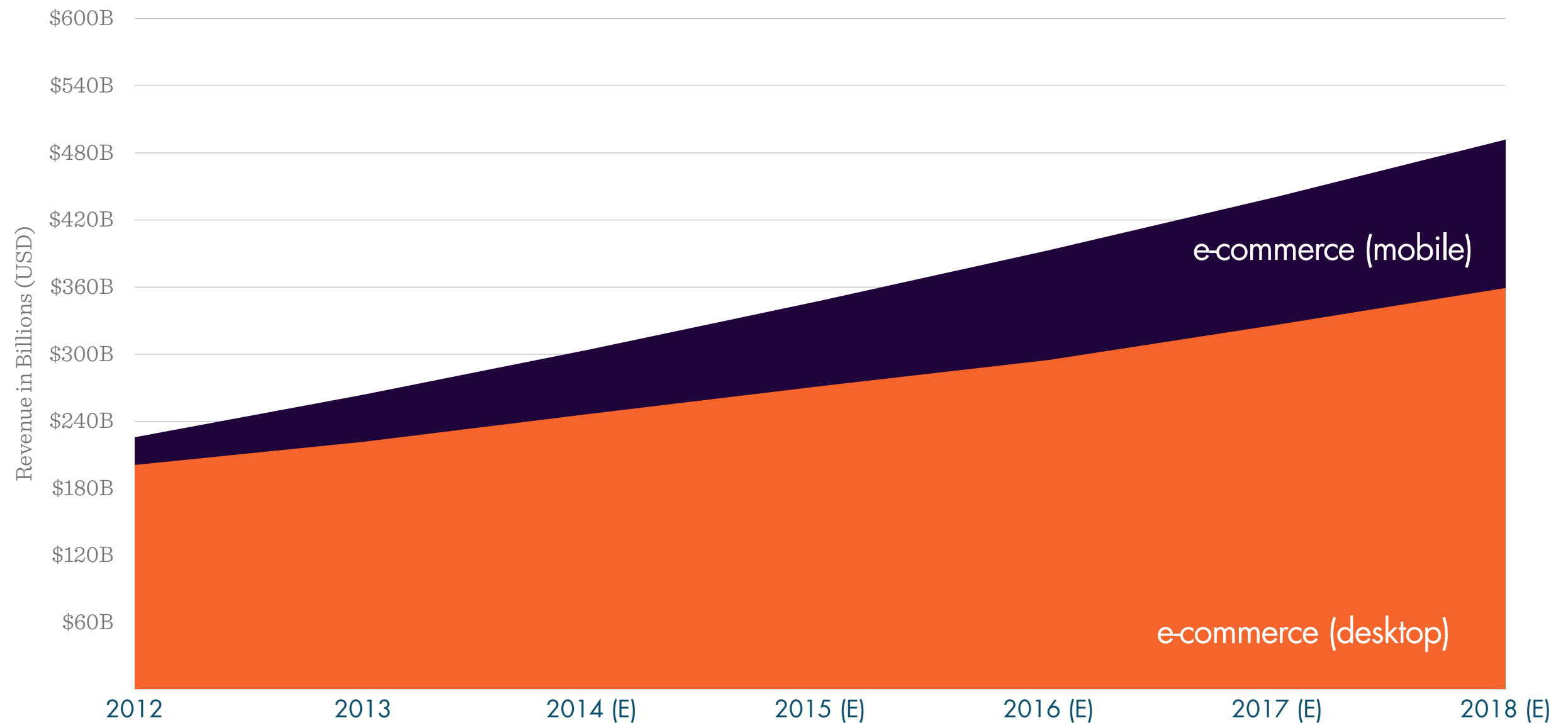


E-Commerce Deep Dive

E-Commerce Growth Will Be Driven by Mobile

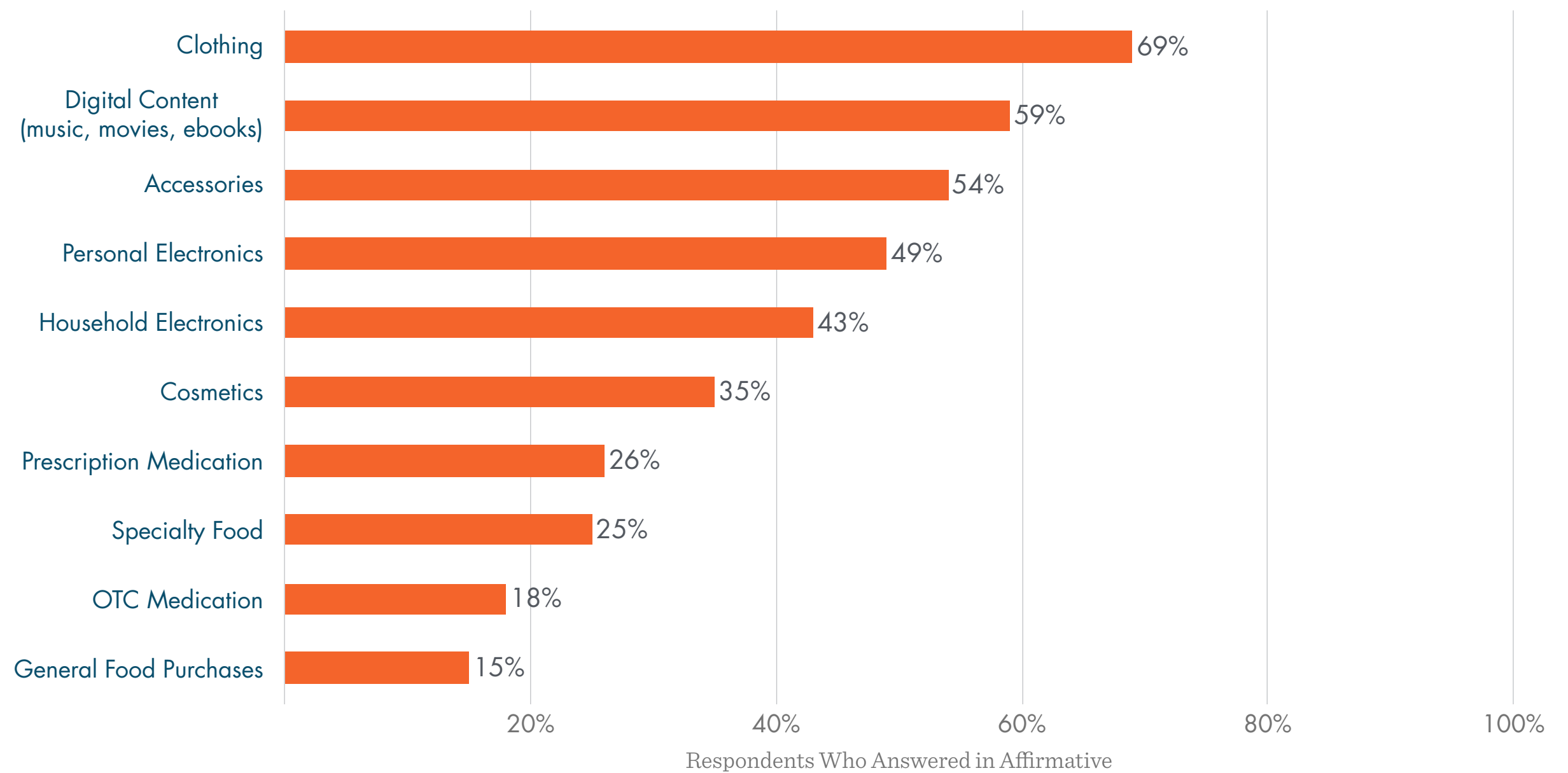


US desktop e-commerce and mobile e-commerce sales 2012 - 2018 (estimated)



Clothing and Digital Content are Top Online Buys

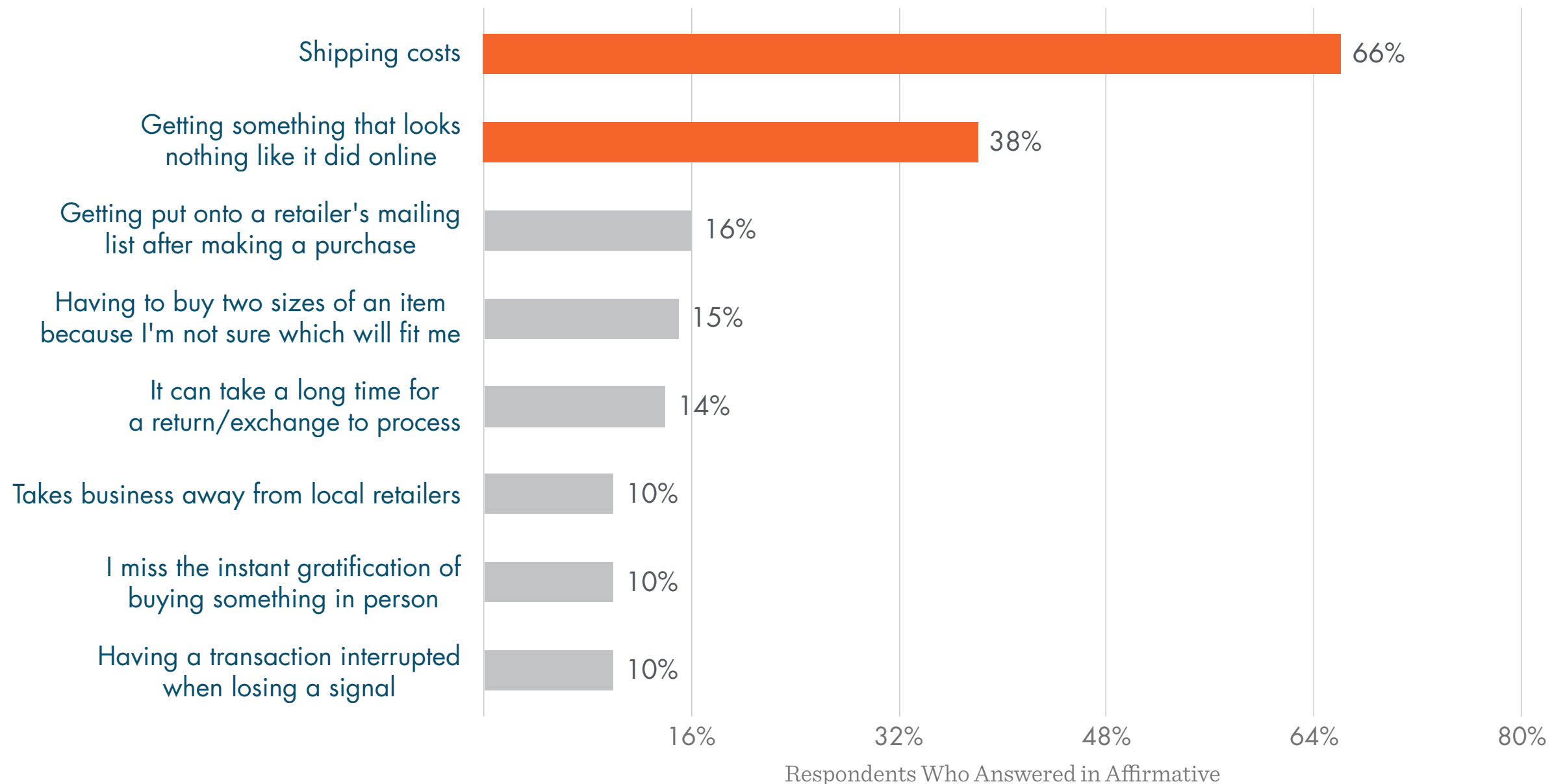
What US consumers say they have purchased online by category



Shipping Costs + Surprises are Biggest Peeves



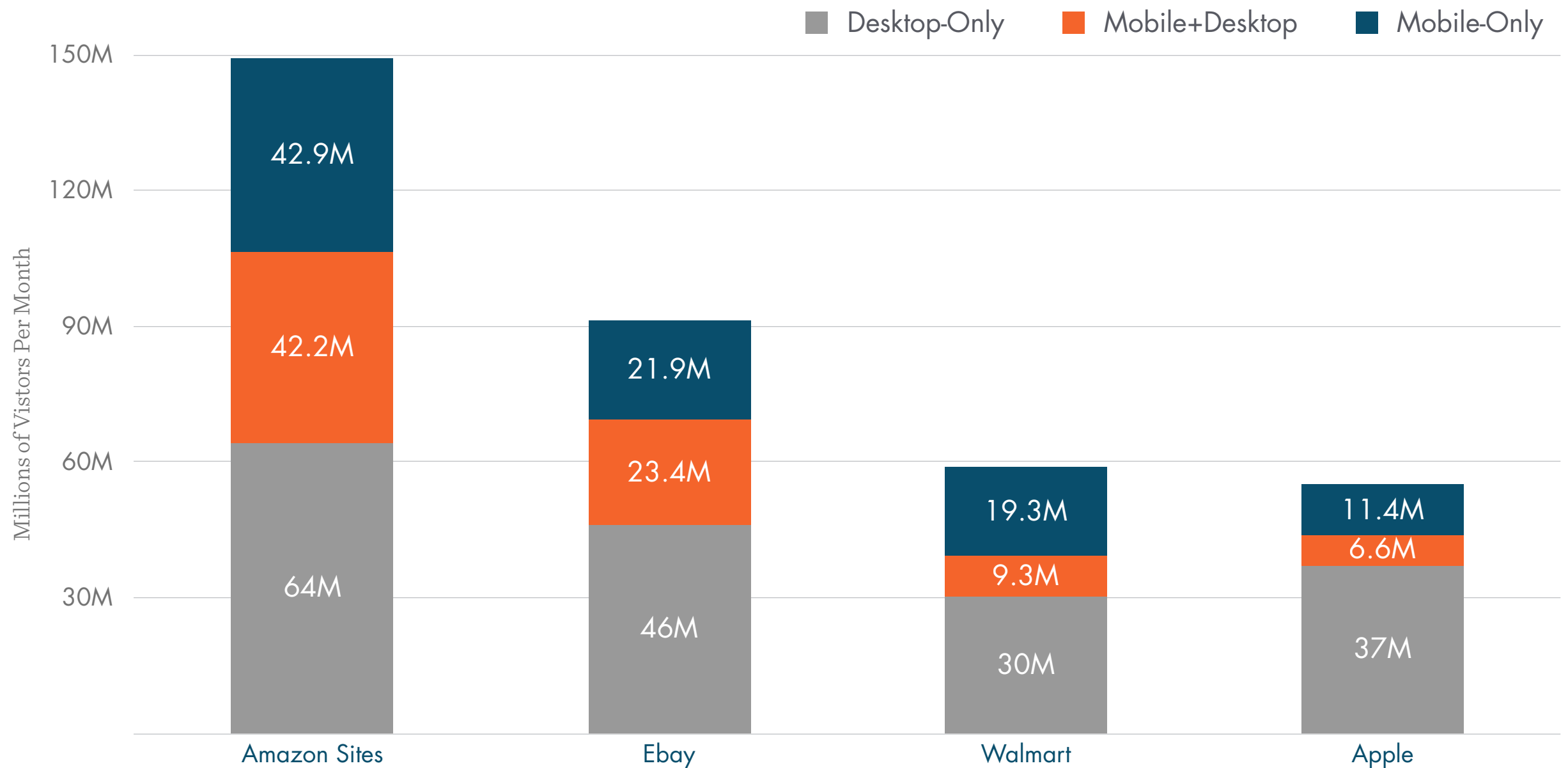
US adult responses to “Which of these are among your biggest online shopping pet peeves?”



Amazon Leads Retailers in Mobile Visitors



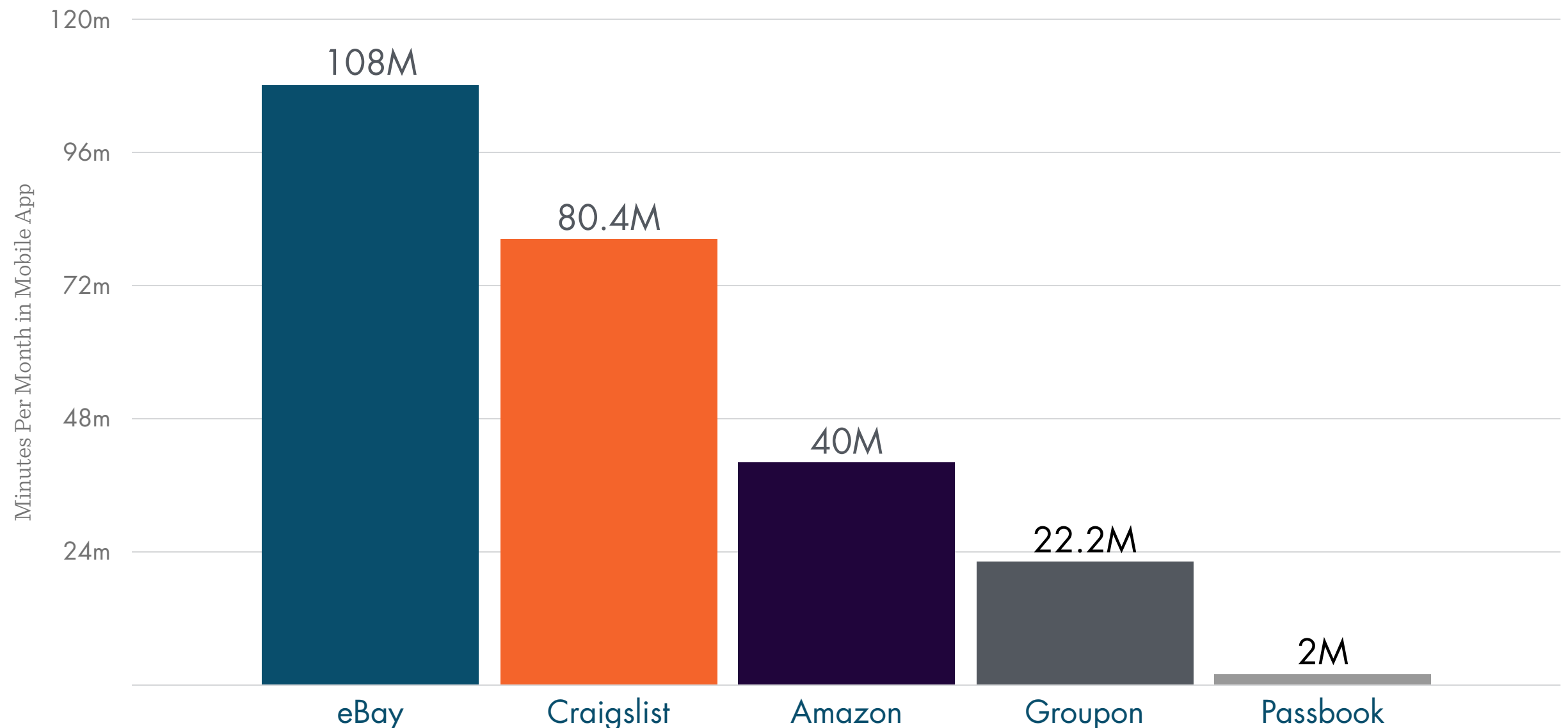
Monthly visitors across desktop and mobile for top 4 US e-commerce platforms



eBay and Craigslist Top Retail Mobile Apps



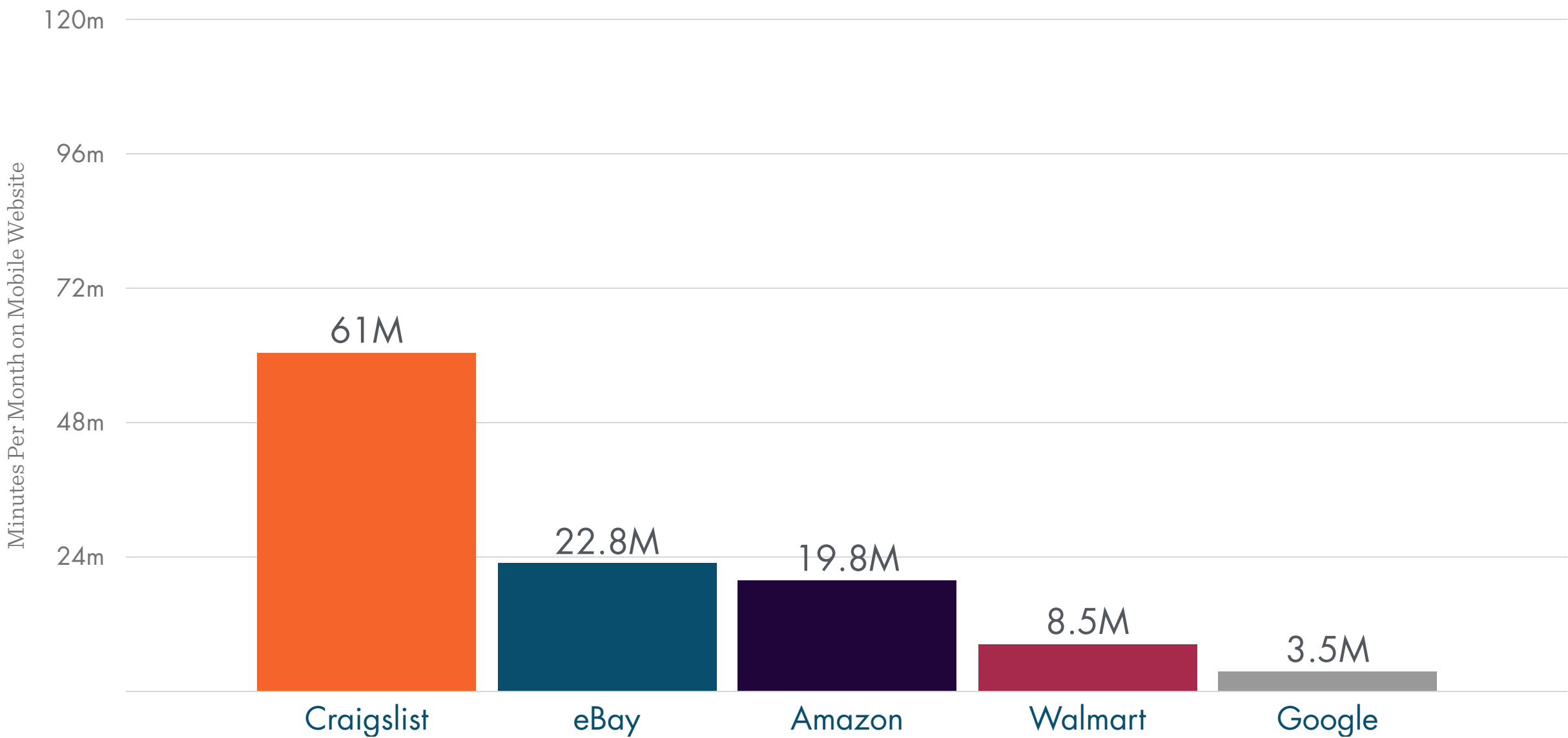
Top five on-device retail mobile apps based on time usage



Craigslist Dominates Retail Mobile Websites



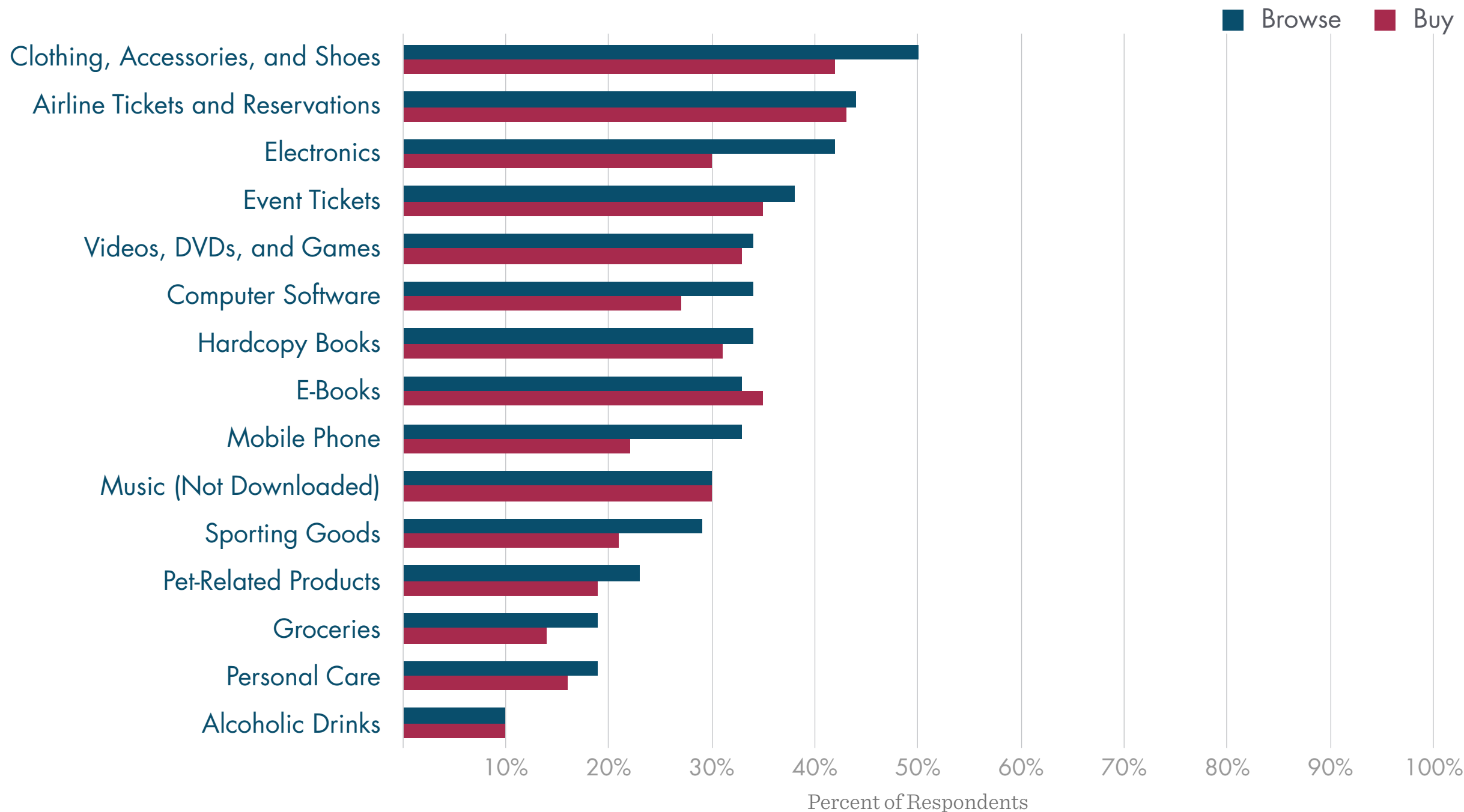
Top five mobile websites for retail based time usage



Clothing, Flights, Events Top Online Buys in Q3 '14

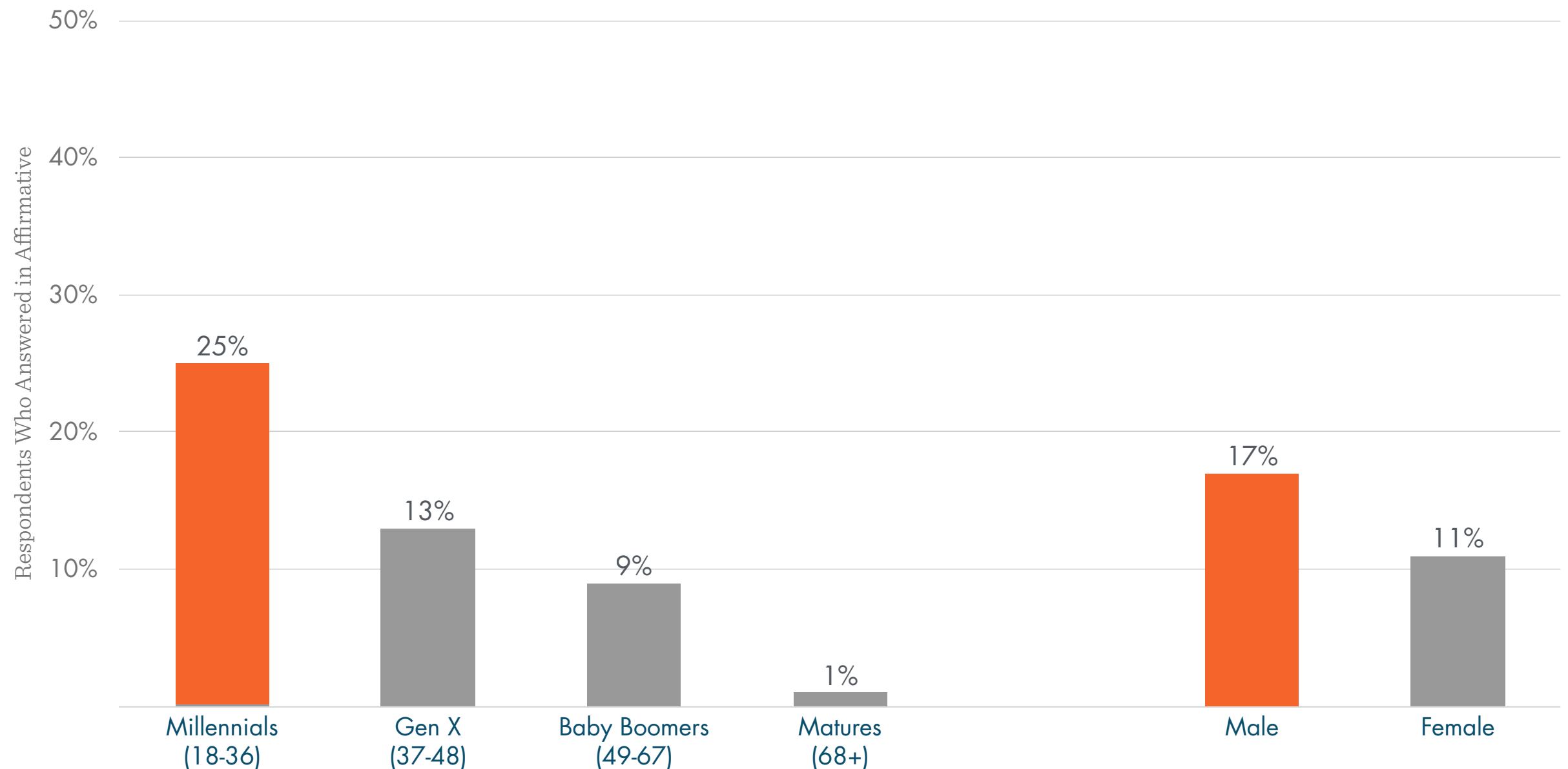


What North American consumers plan to browse and buy online in Q3 2014



Millenials, Men Most Interested in Same Day Delivery

Percentage of respondents most willing to pay extra for same day delivery

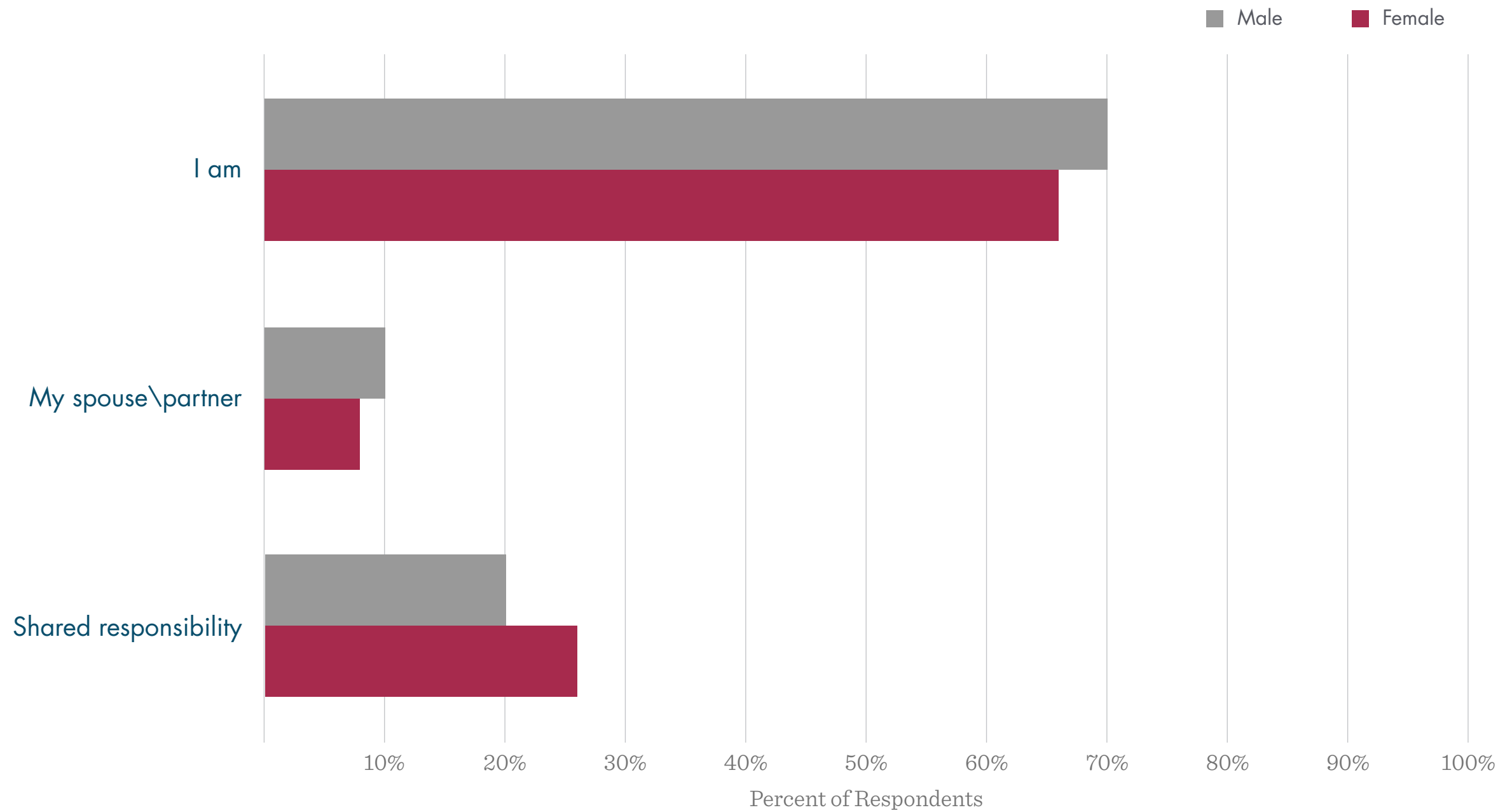


Consumer Behavior

Households Lack Clarity on Who Runs Finances



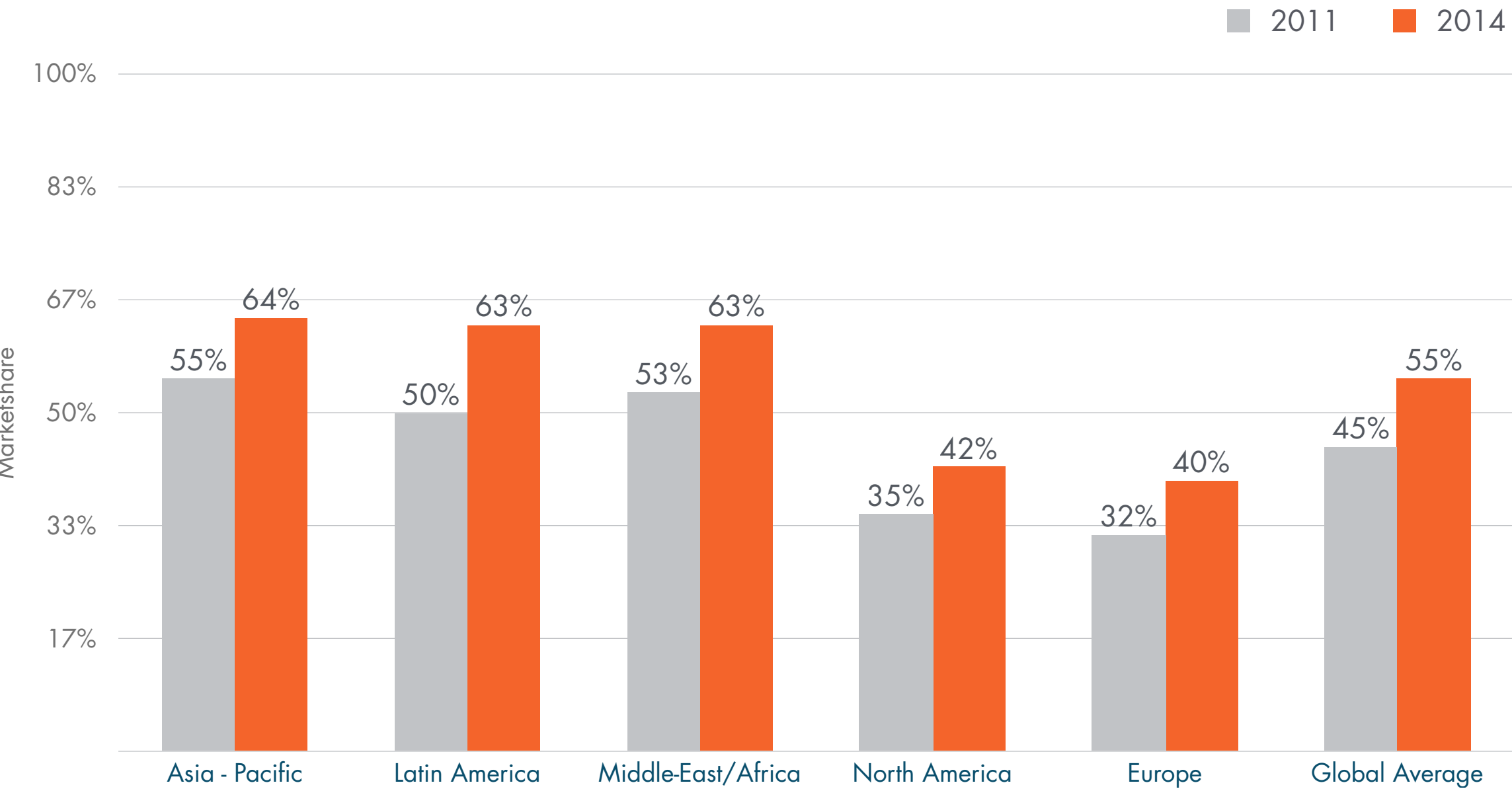
Respondents to “Who is primarily responsible for managing day-to-day finances for the household?”



Consumers Will Pay More for Sustainability



Percentage of consumers willing to pay more from socially responsible companies

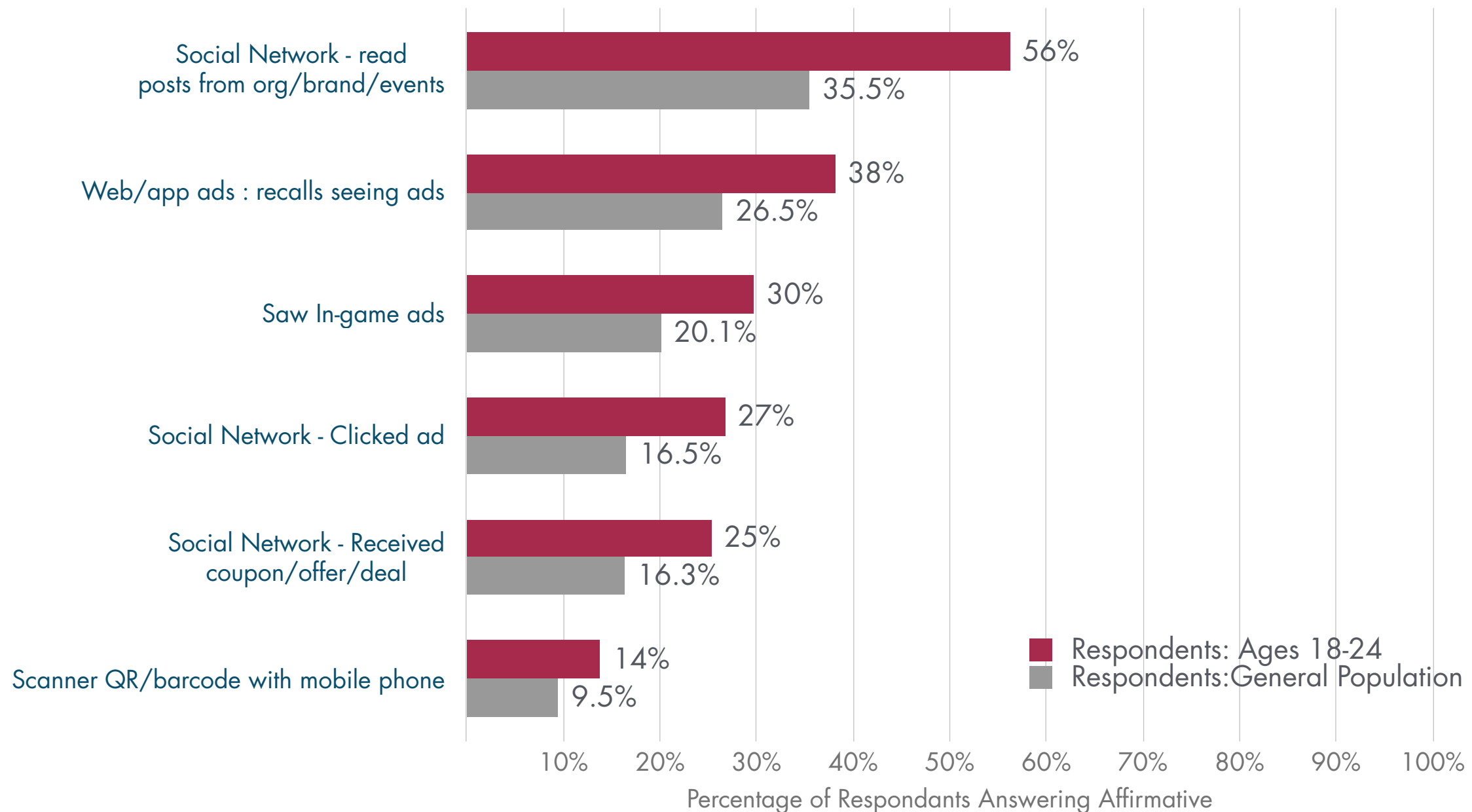


Nielsen | June 2014 - based on survey of 30,000 online consumers in 60 nations

Young Adults Are Far More Active on Digital



Mobile Advertising/Activities among UK Smartphone Users (18-24 yrs old vs General Population)

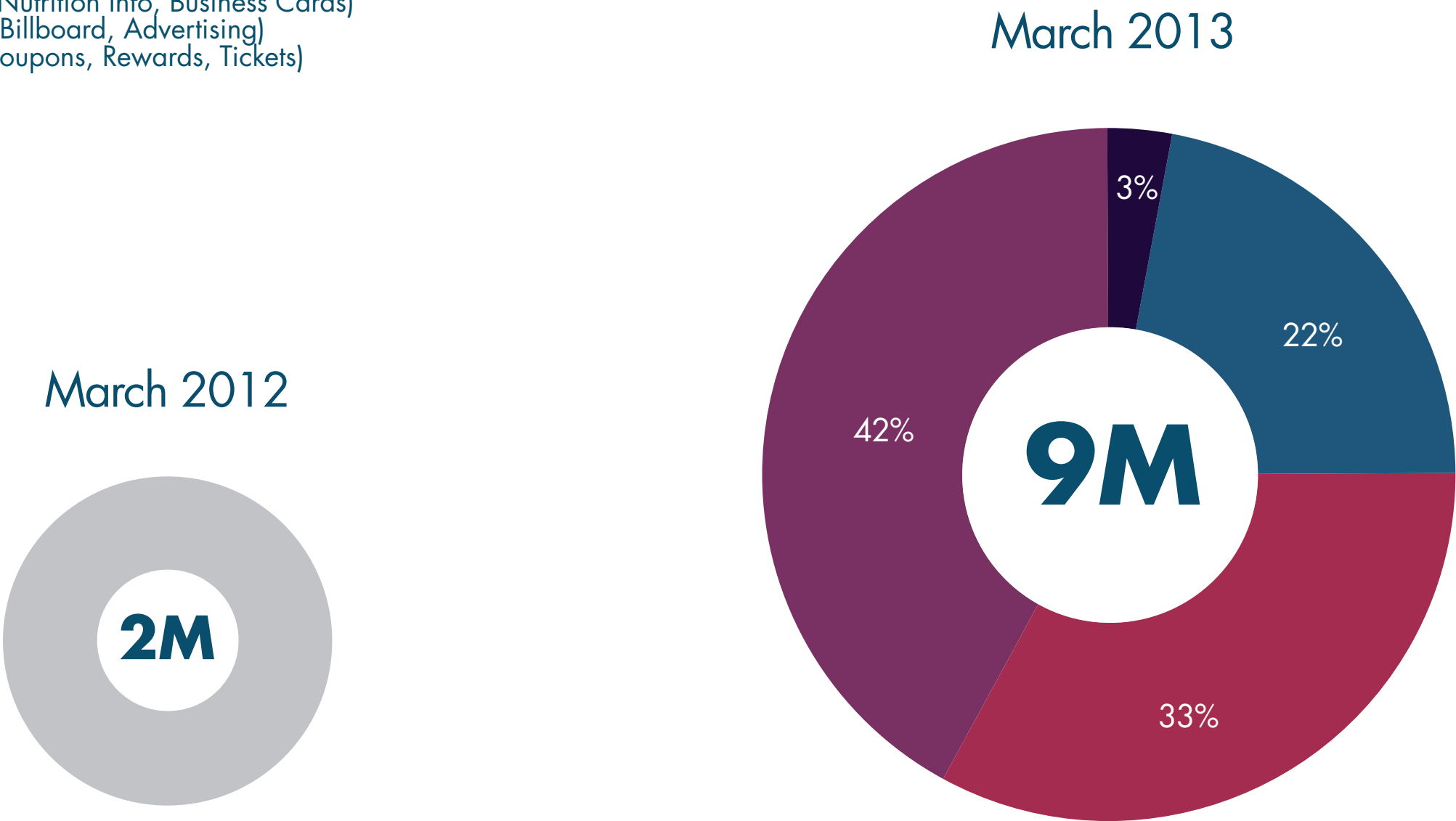


QR Code Scanning Grew from 2012-13 in China



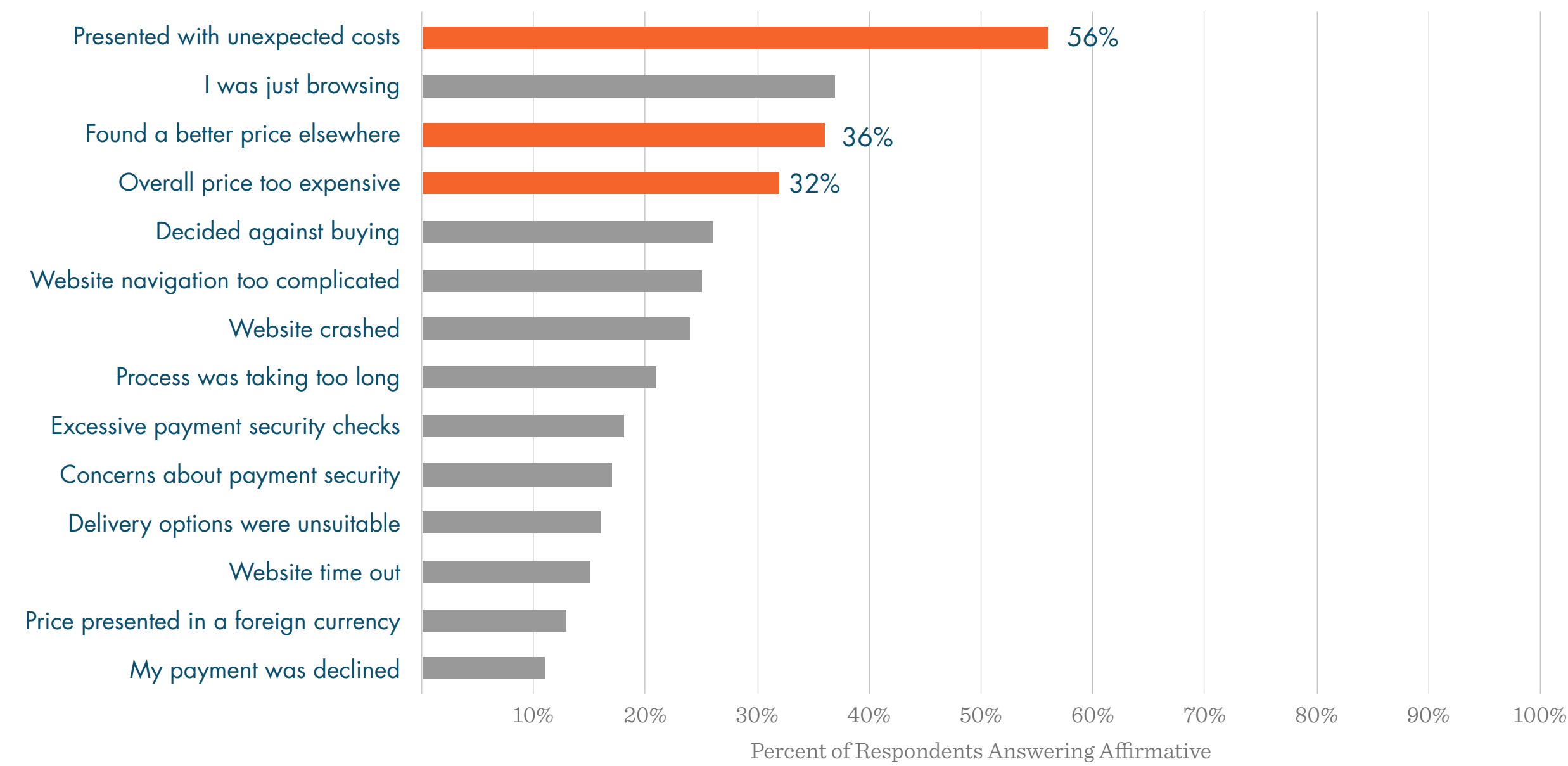
China Monthly QR Codes Scanned by Use Case March 2012 vs March 2013

- Payment
- Information (Nutrition Info, Business Cards)
- Promotions (Billboard, Advertising)
- Passcode (Coupons, Rewards, Tickets)
- Unknown



Cost is Top Reason for Online Cart Abandonment

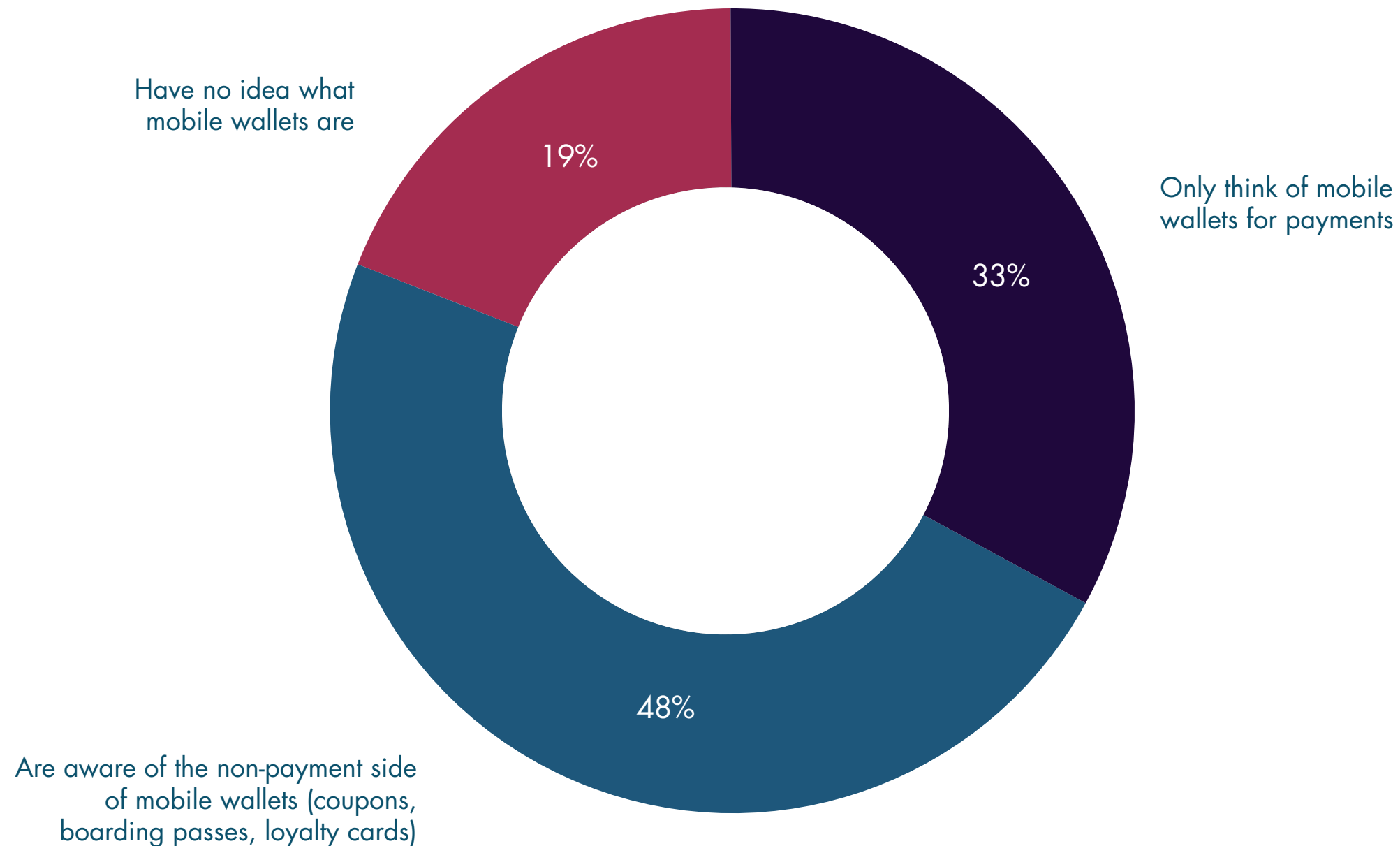
Reasons why online shoppers leave without paying



Mobile Wallets Still Gaining Market Awareness

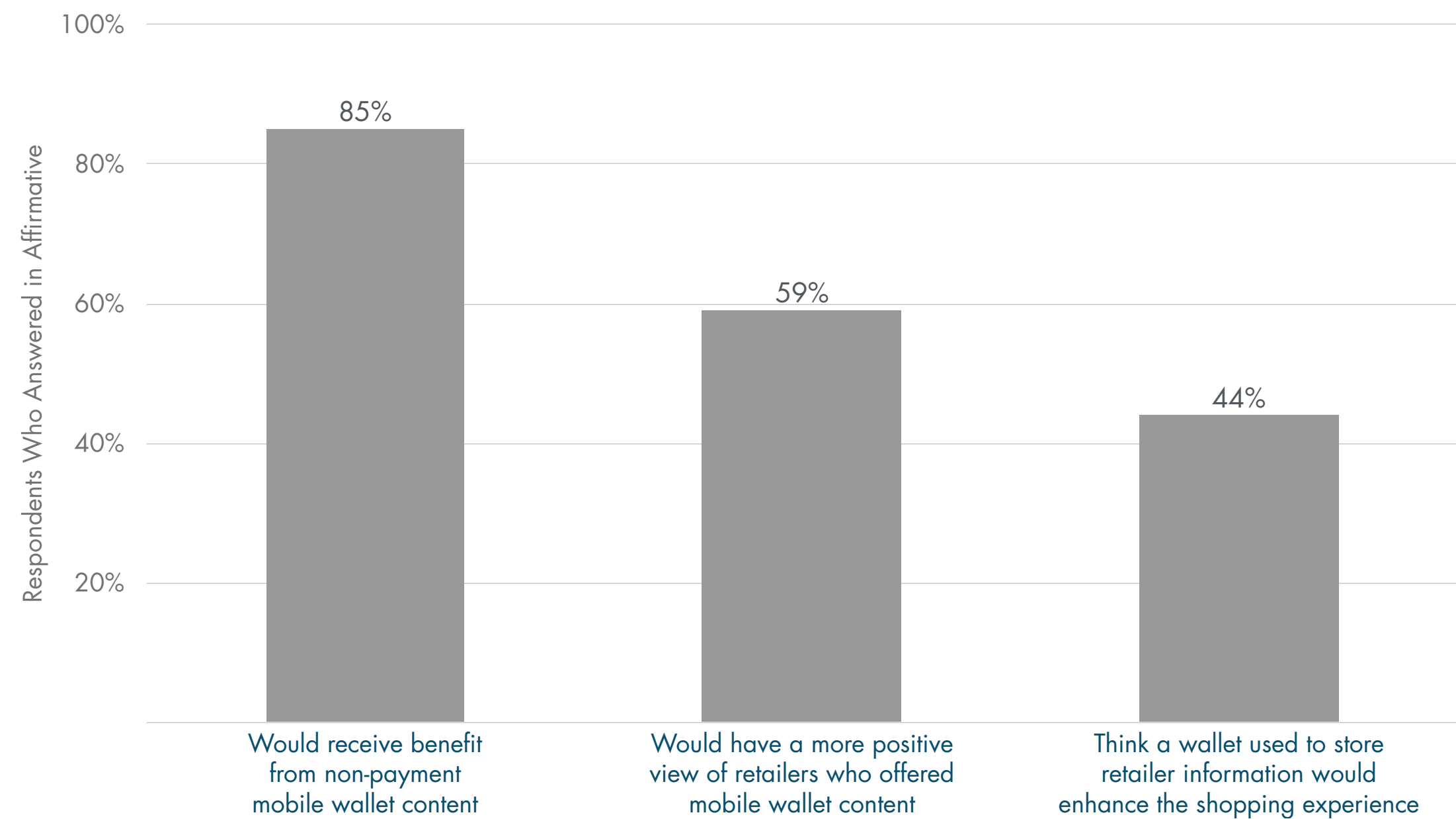


US consumers awareness of mobile wallet functionality



Consumers See Beyond Payments with Mobile Wallets

US consumers interest in non-payment mobile wallet features



Path to Purchase

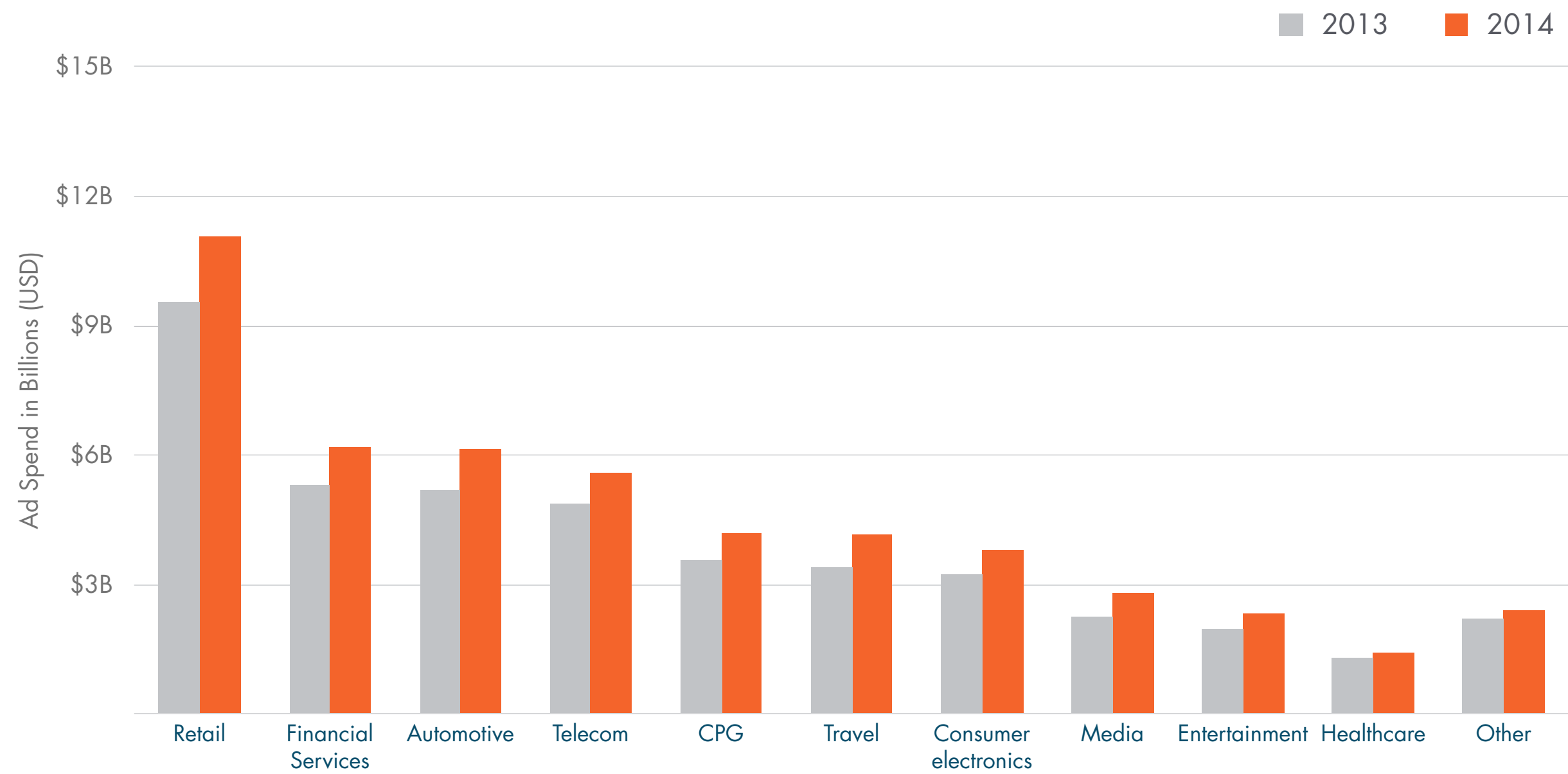
How do you get from the product to the customer?

How do you get from the customer to the product?

Retail Leads Industry in Digital Ad Spend



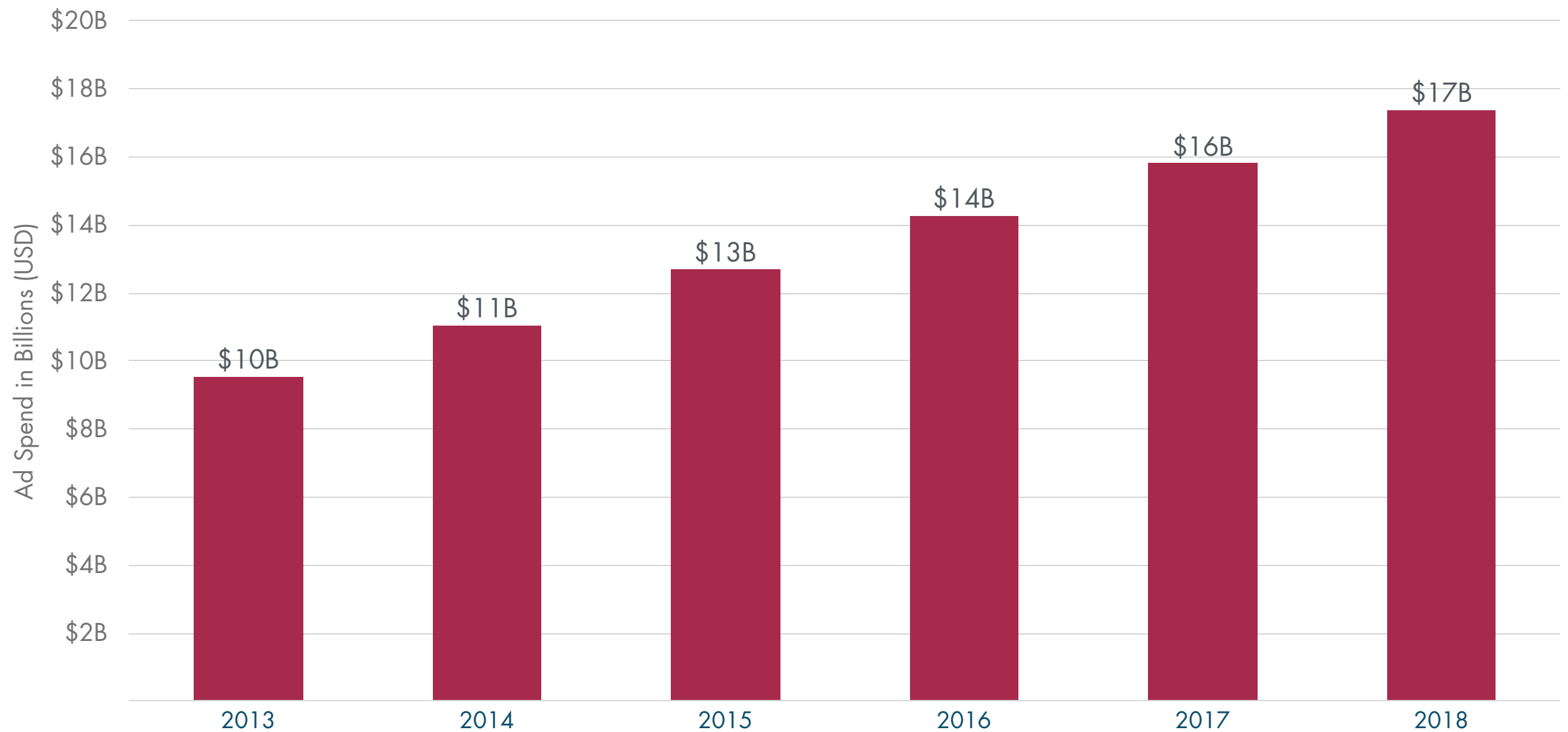
US Digital Ad Spend by Industry in 2013 vs 2014 (estimated)



Retail Digital Ad Spend to Grow 12.8% Year/Year



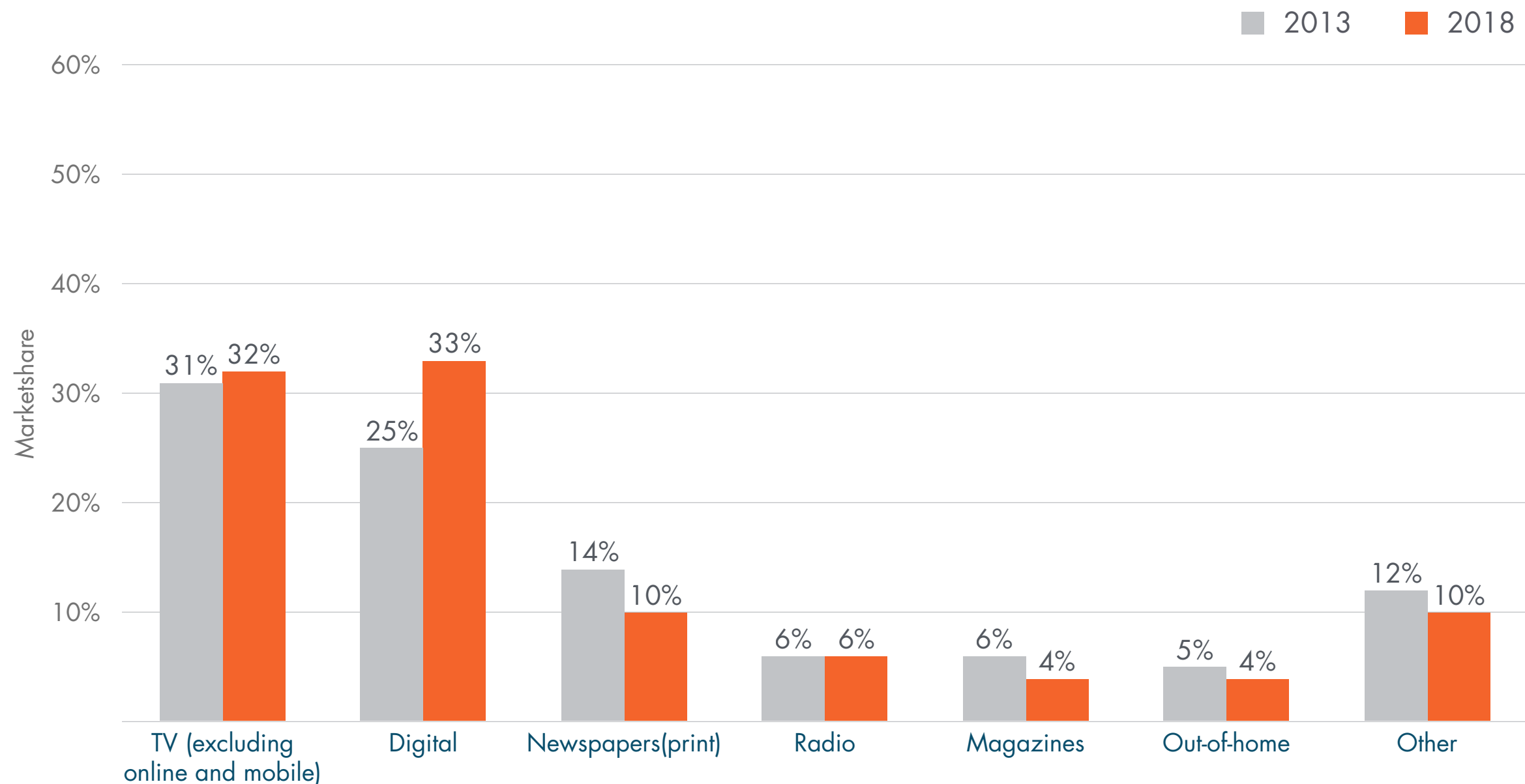
Retail industry's US digital ad spend 2013-2018 (estimated)



Biggest Growth in Ad Spend Will Be Digital



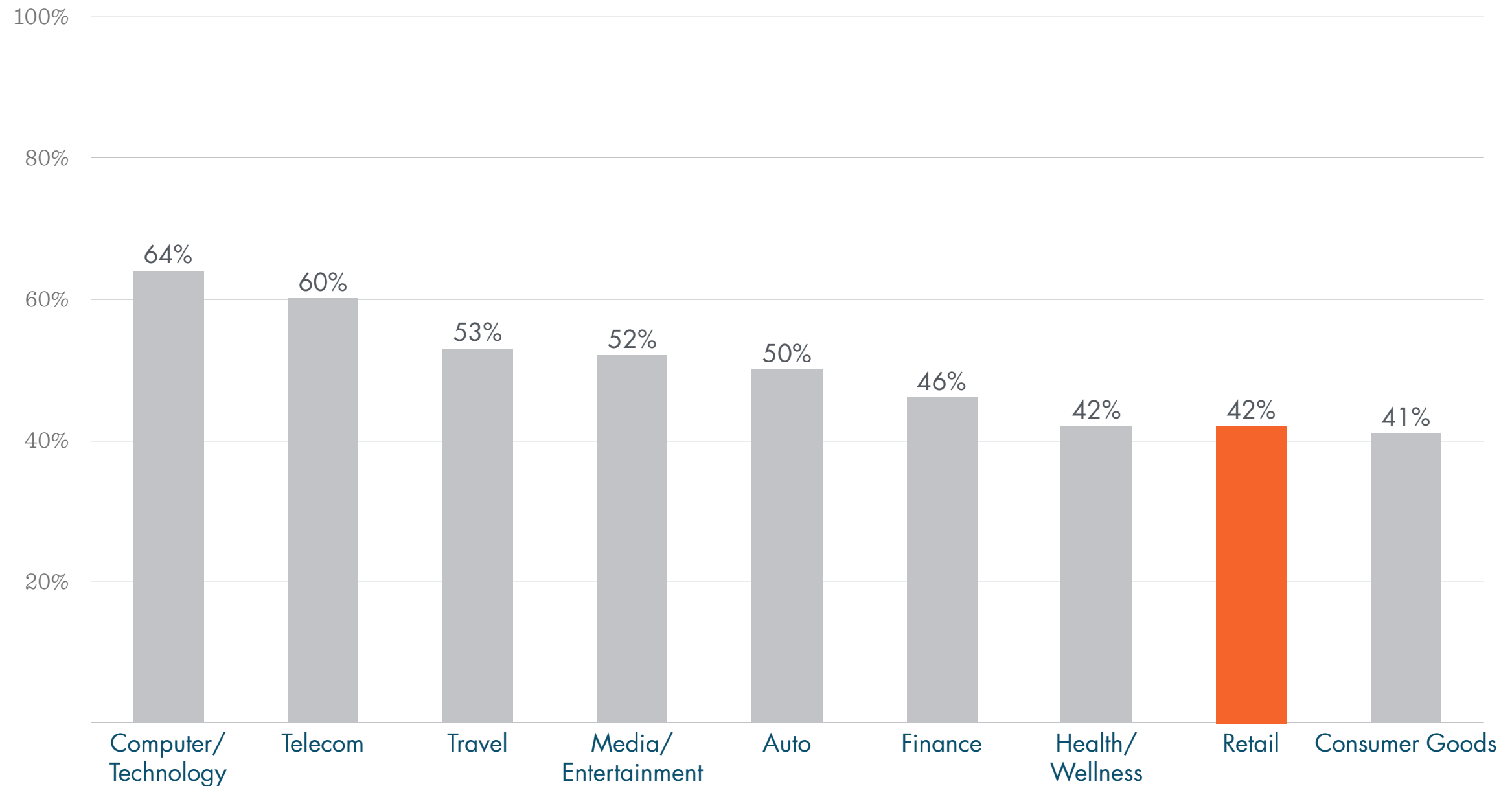
Ad spend distribution worldwide in 2013 and 2018 (estimated) by medium



Digital Ads on Retail Struggle to Reach Target



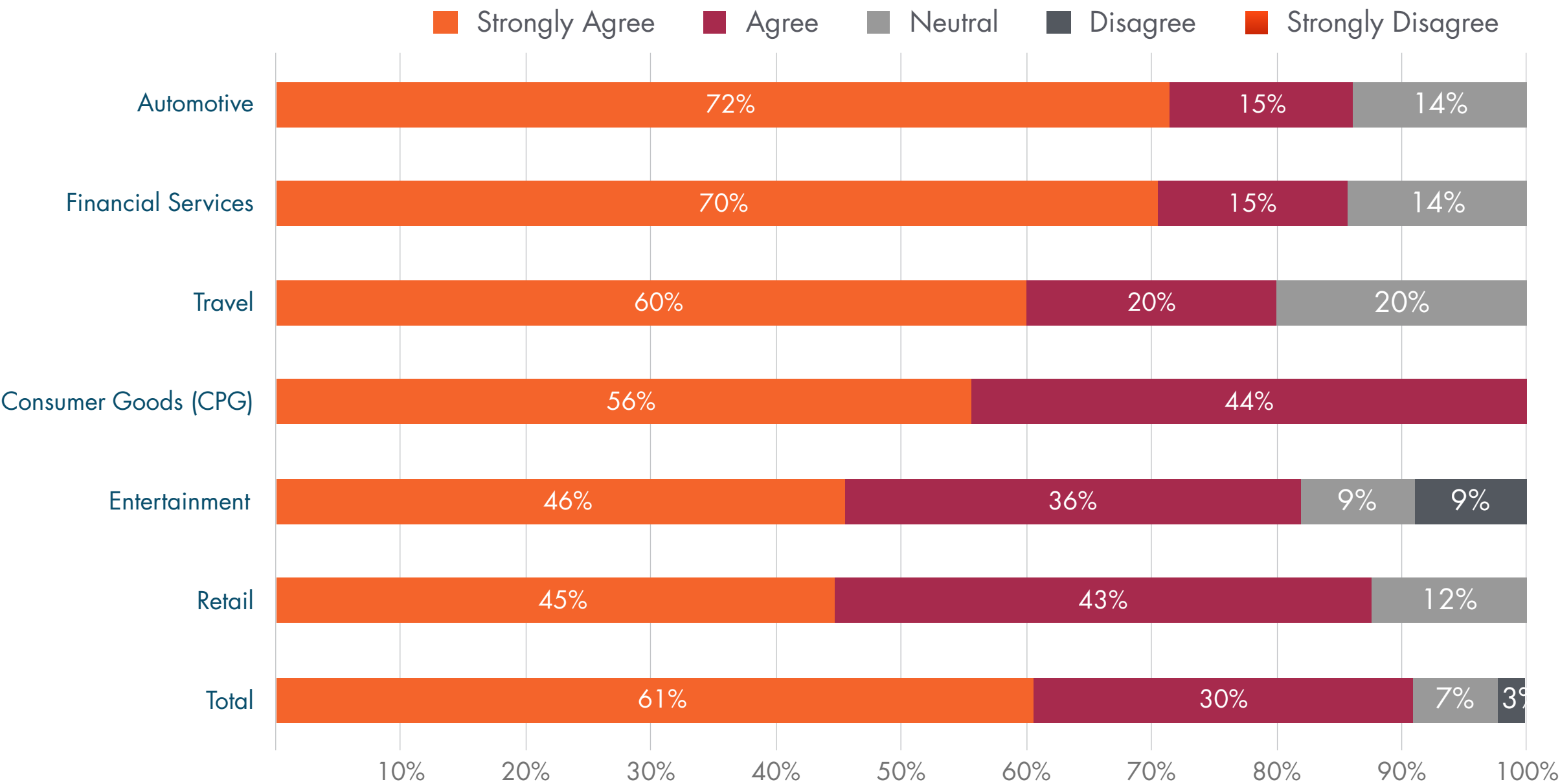
Percentage of Display and Video Ads Reaching Intended Audience by Industry in Q1 2014



88% of Retail Marketers See Data as Important



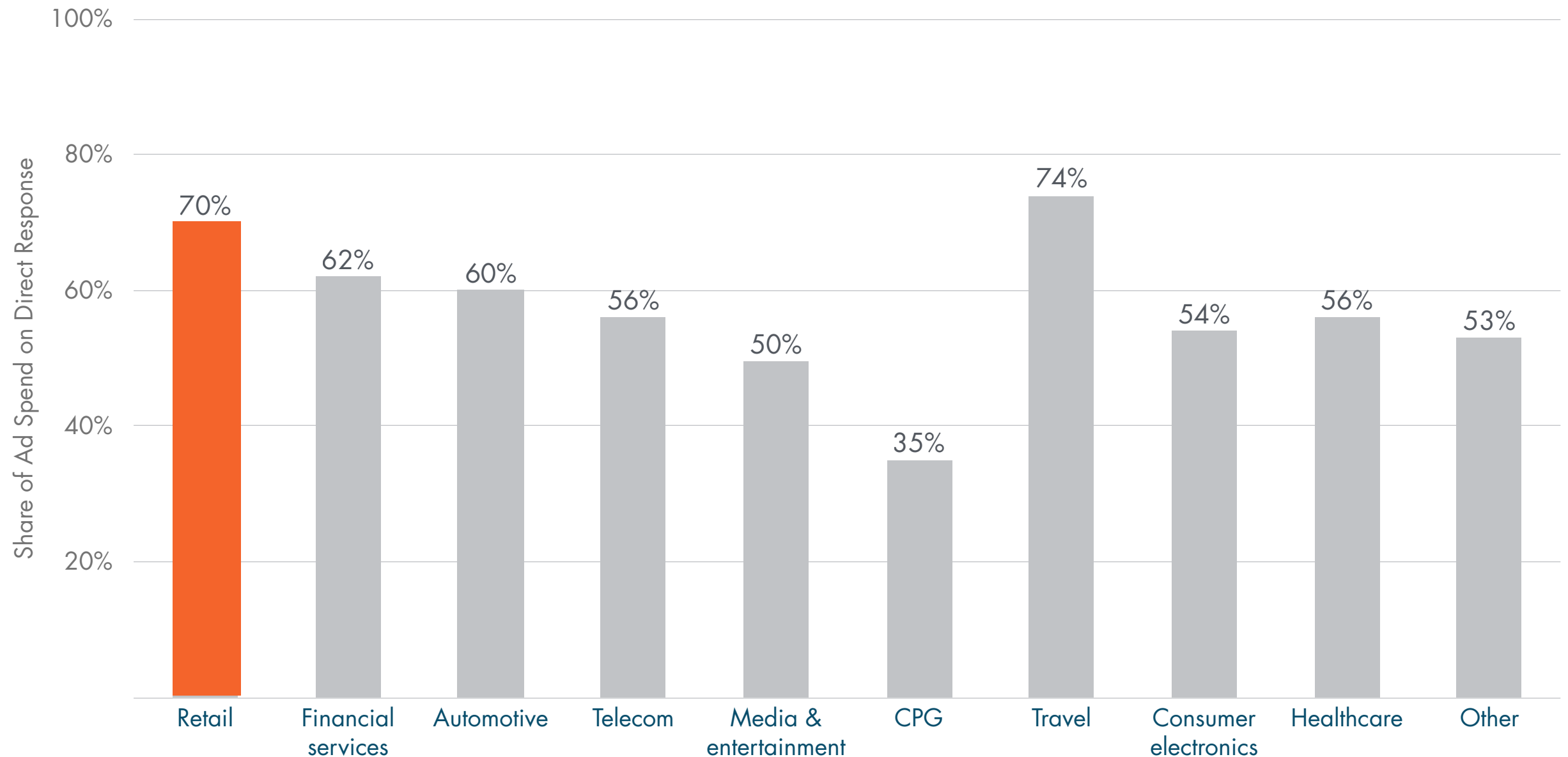
US Marketers who believe data access/use is very important to their ad spend by industry



Retail & Travel Spend Most on Direct Response



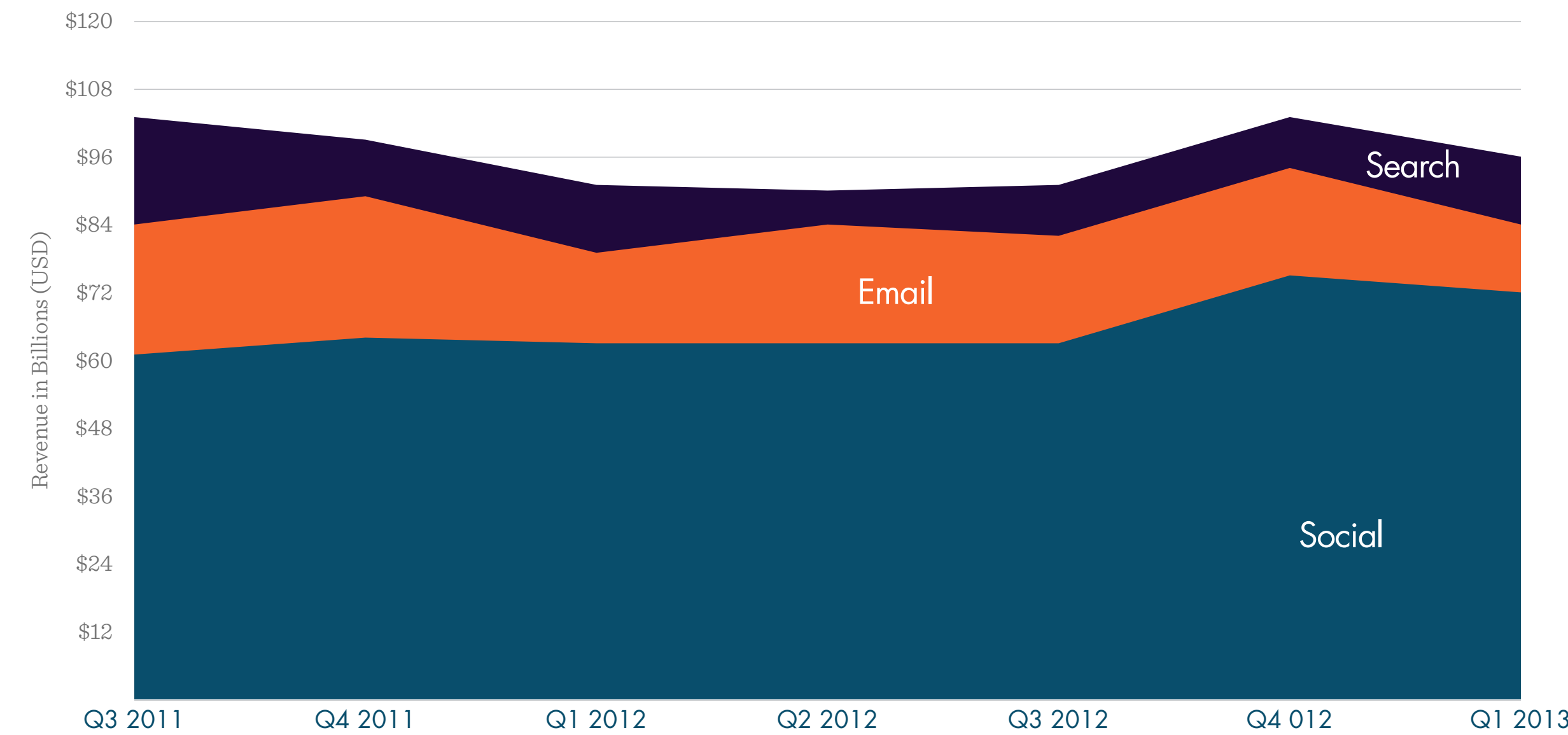
US digital ad spend on direct response in 2014 by industry



Search Traffic Drives Highest Order Value



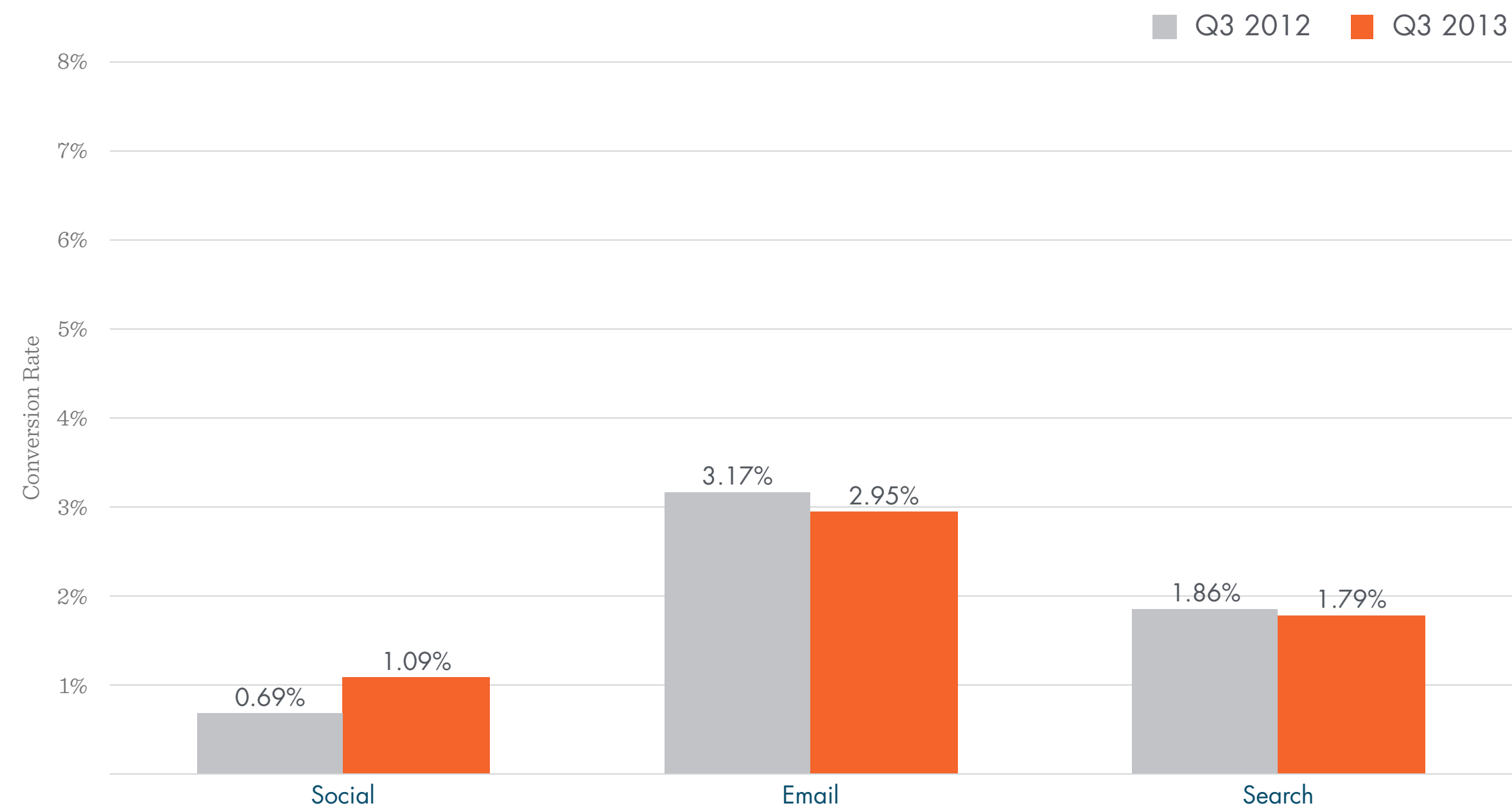
Average order value for e-commerce purchases based on traffic source



Social Traffic Conversion Rates are Growing



Conversion rate to purchase by traffic source



Pinterest is Social Leader in Average Order Value



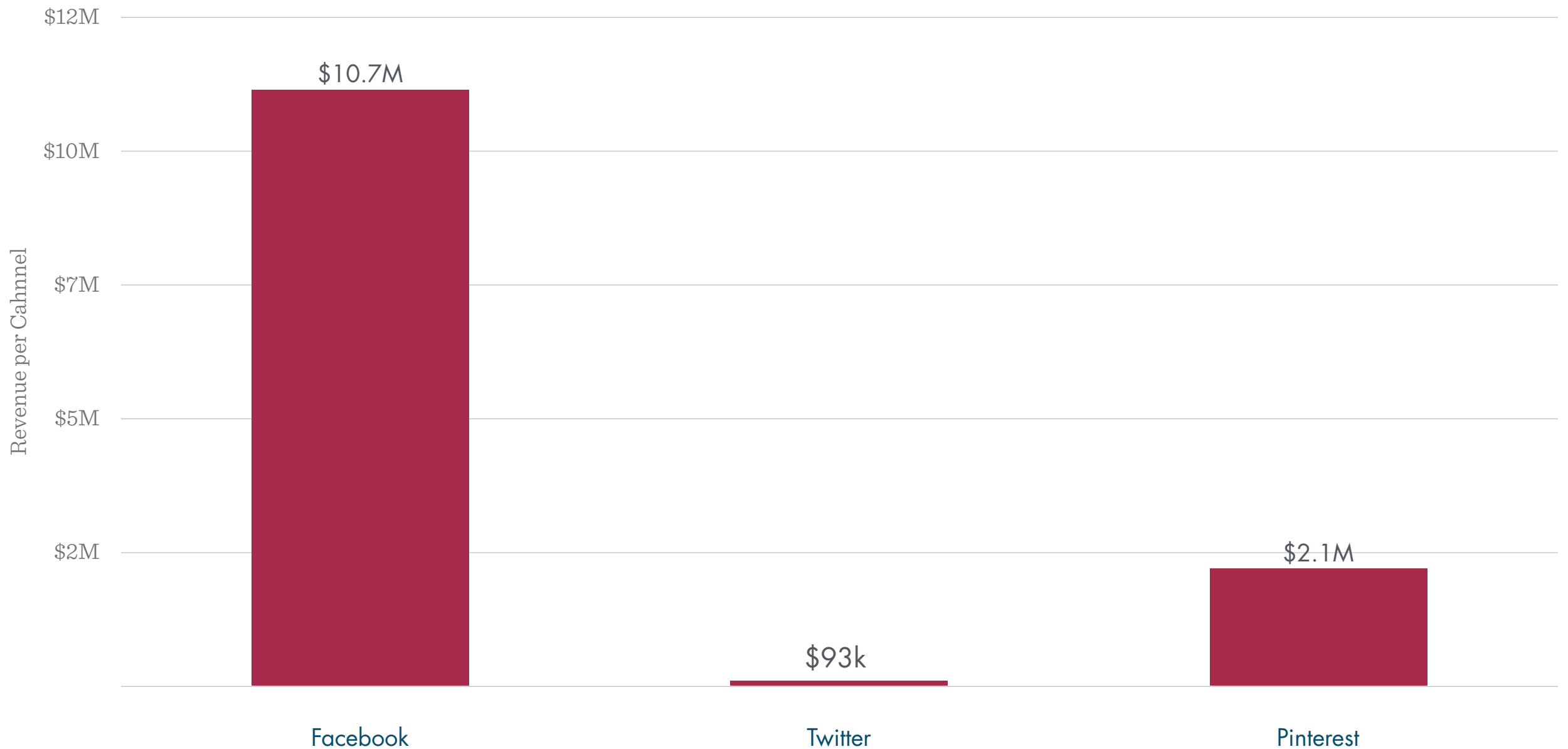
Average order value based on two studies by social channel



Facebook is Still the Volume Leader for Social



Total e-commerce sales in Q3 2013 from social sessions by channel tracked by Rich Relevance

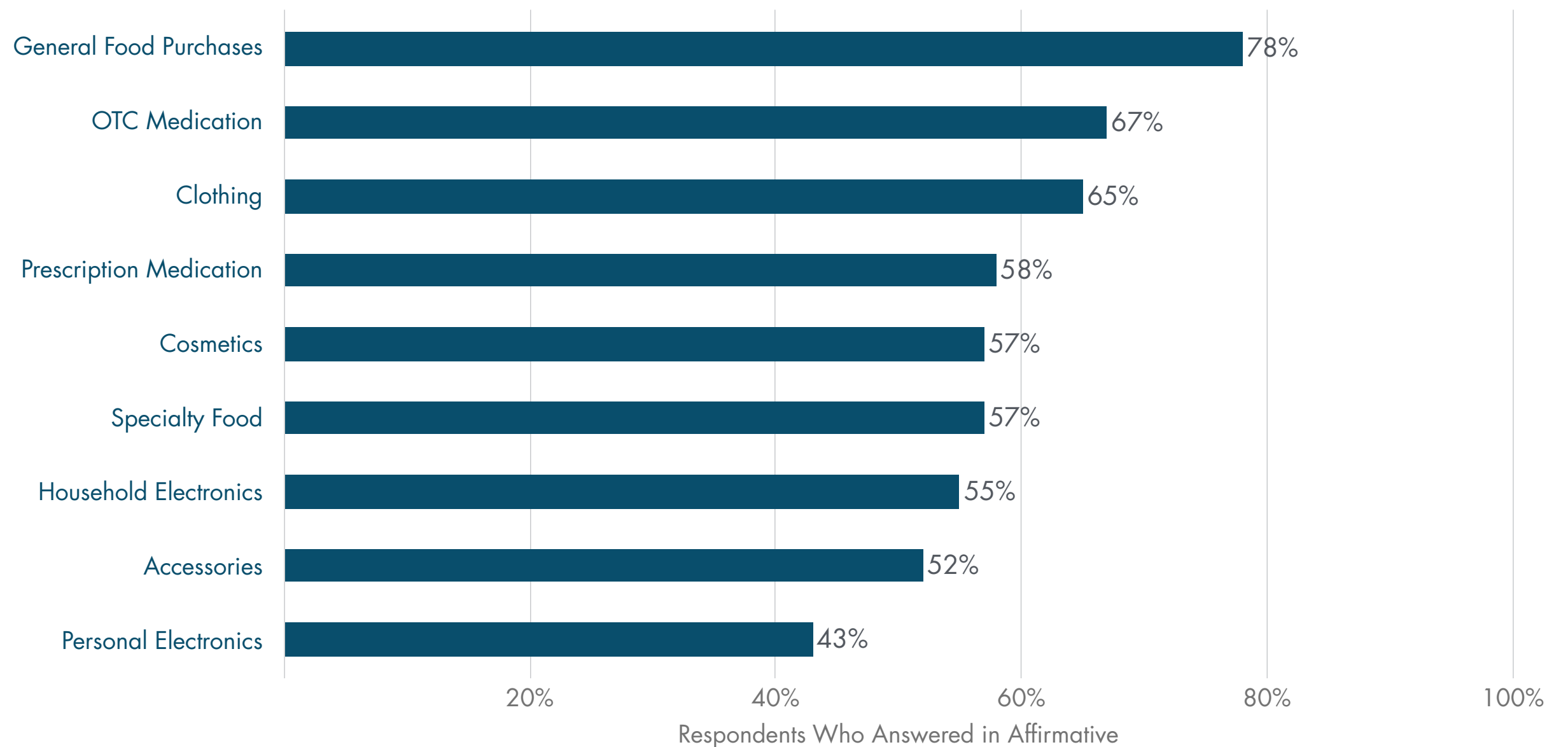


Offline Strikes Back

General Food and OTC Meds Top In-Store Buys

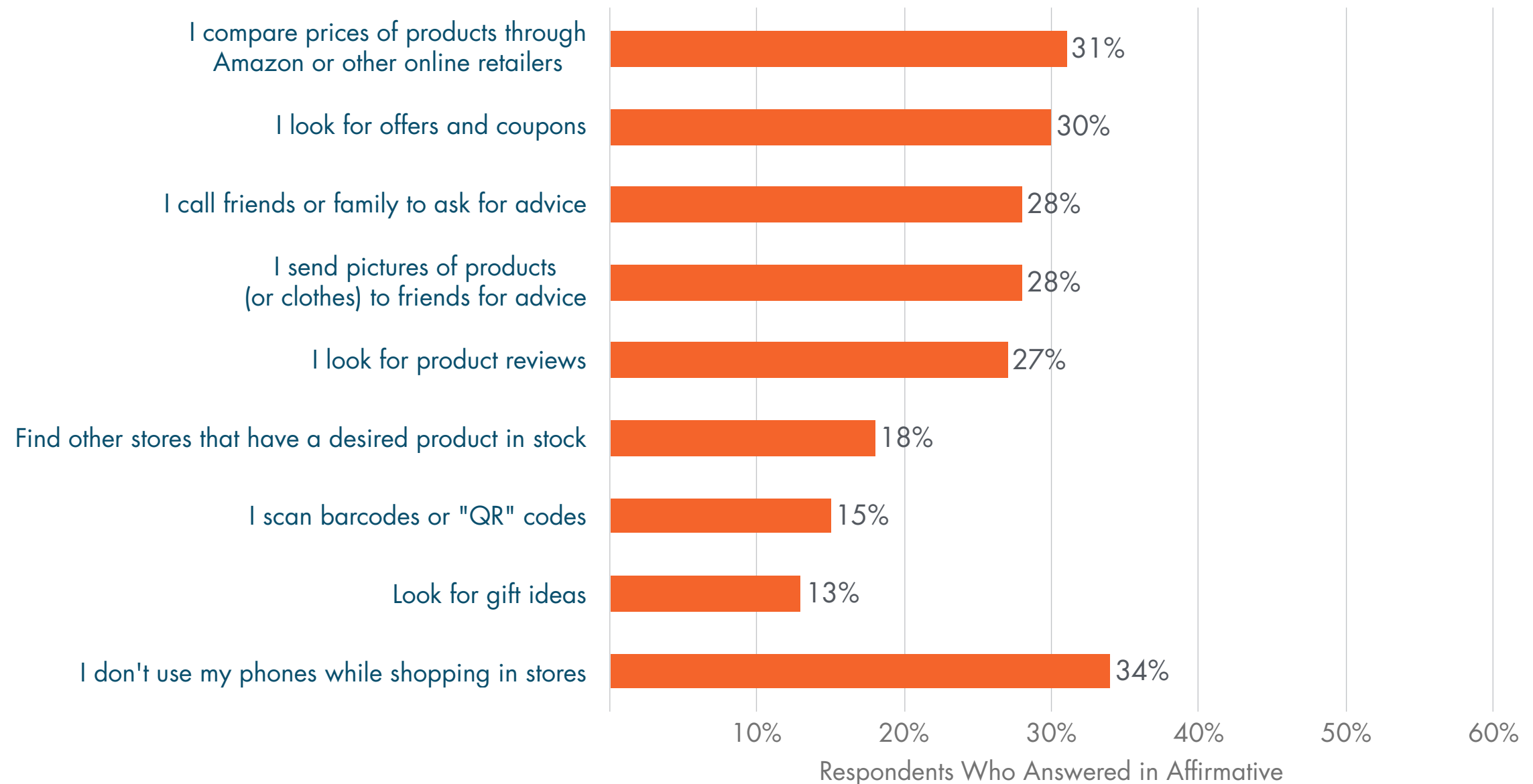


What US consumers say they prefer to purchase in person by category



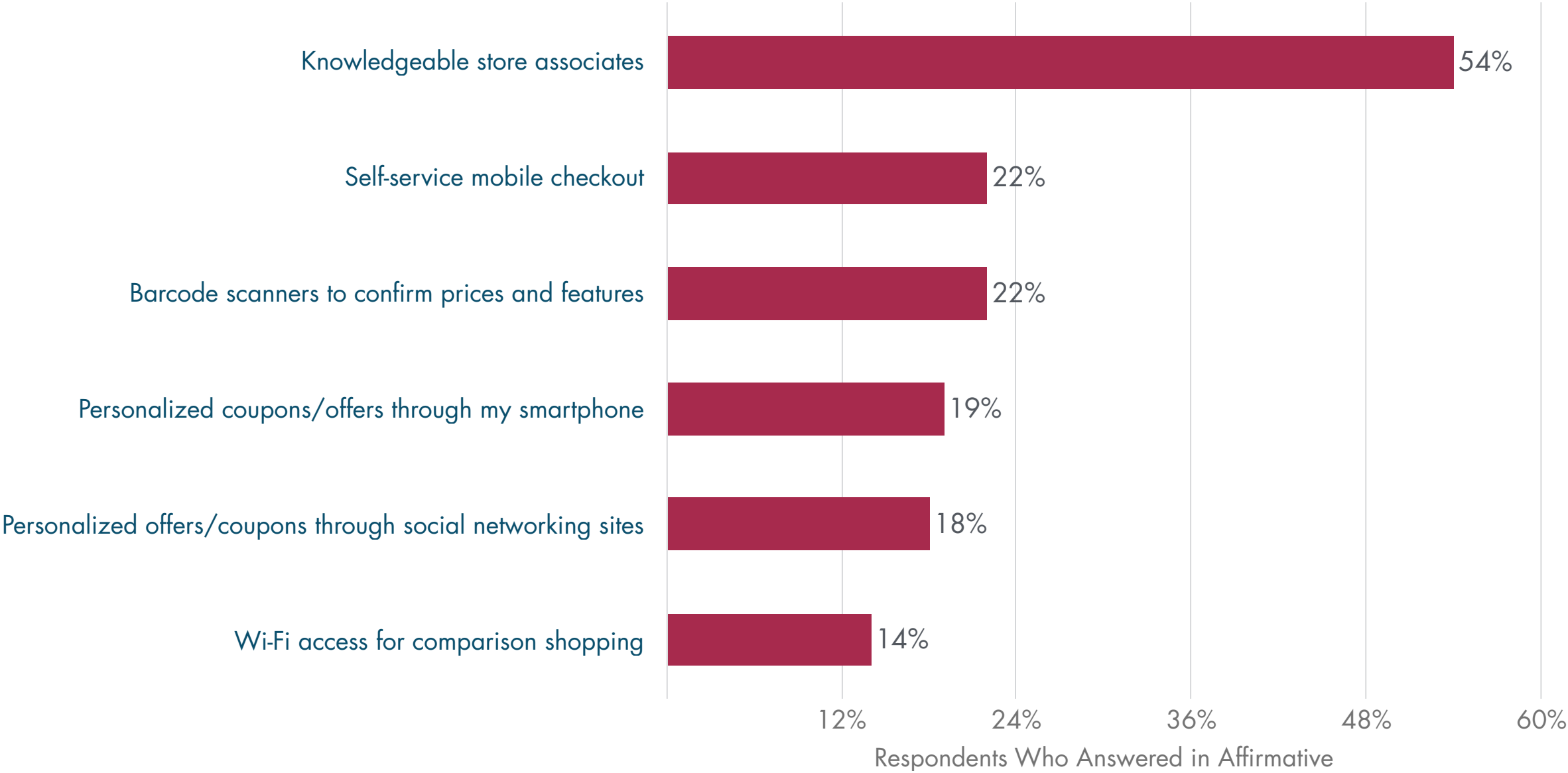
Price & Coupon Searches Lead In-Store Phone Use

What consumers do on their smartphones when shopping in stores



Great Human Service Draws Shoppers to In-Store Buys

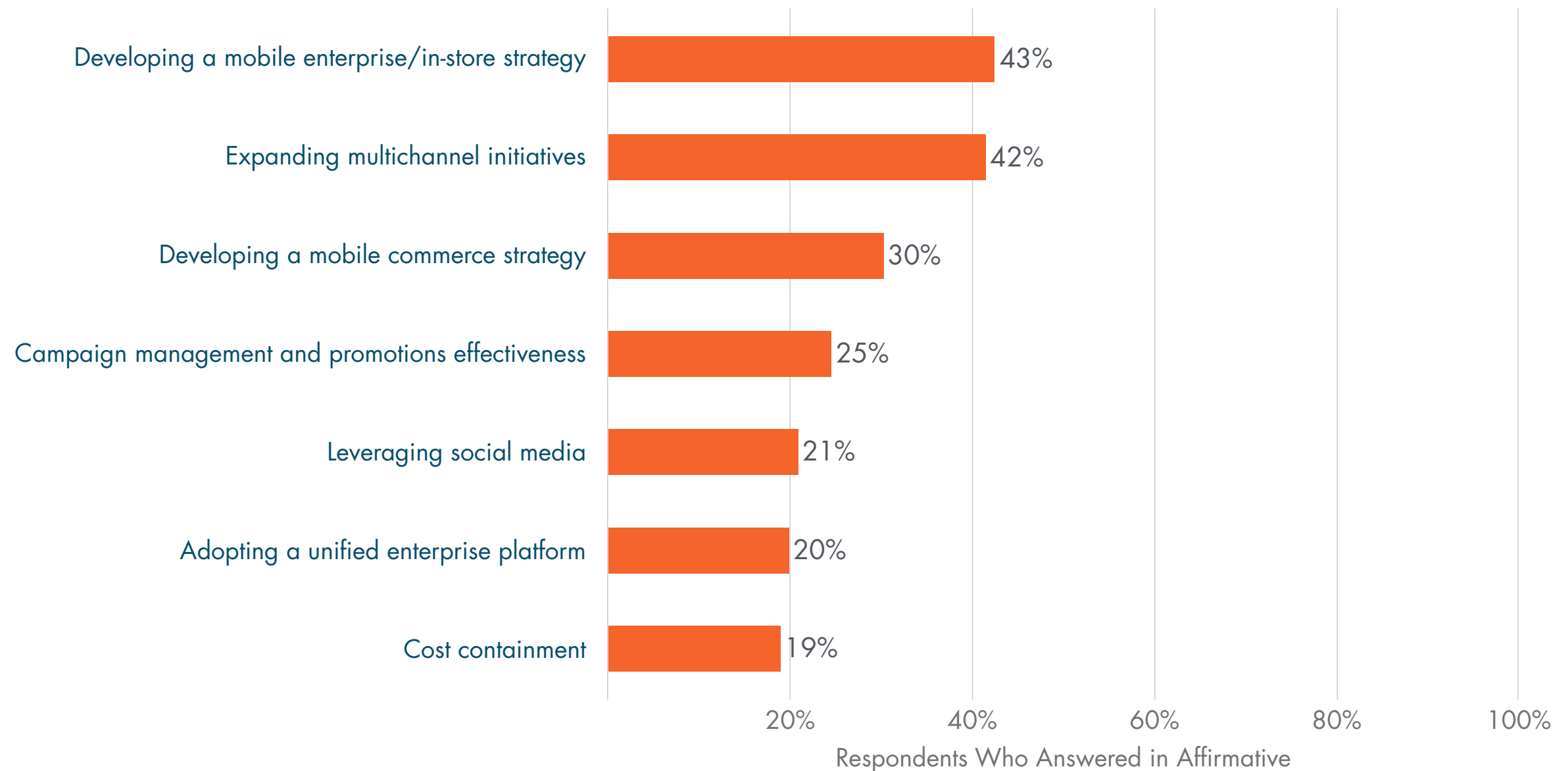
Retail offers that would drive consumers to purchase in-store vs online



Many Retailers Plan to Invest in Mobile

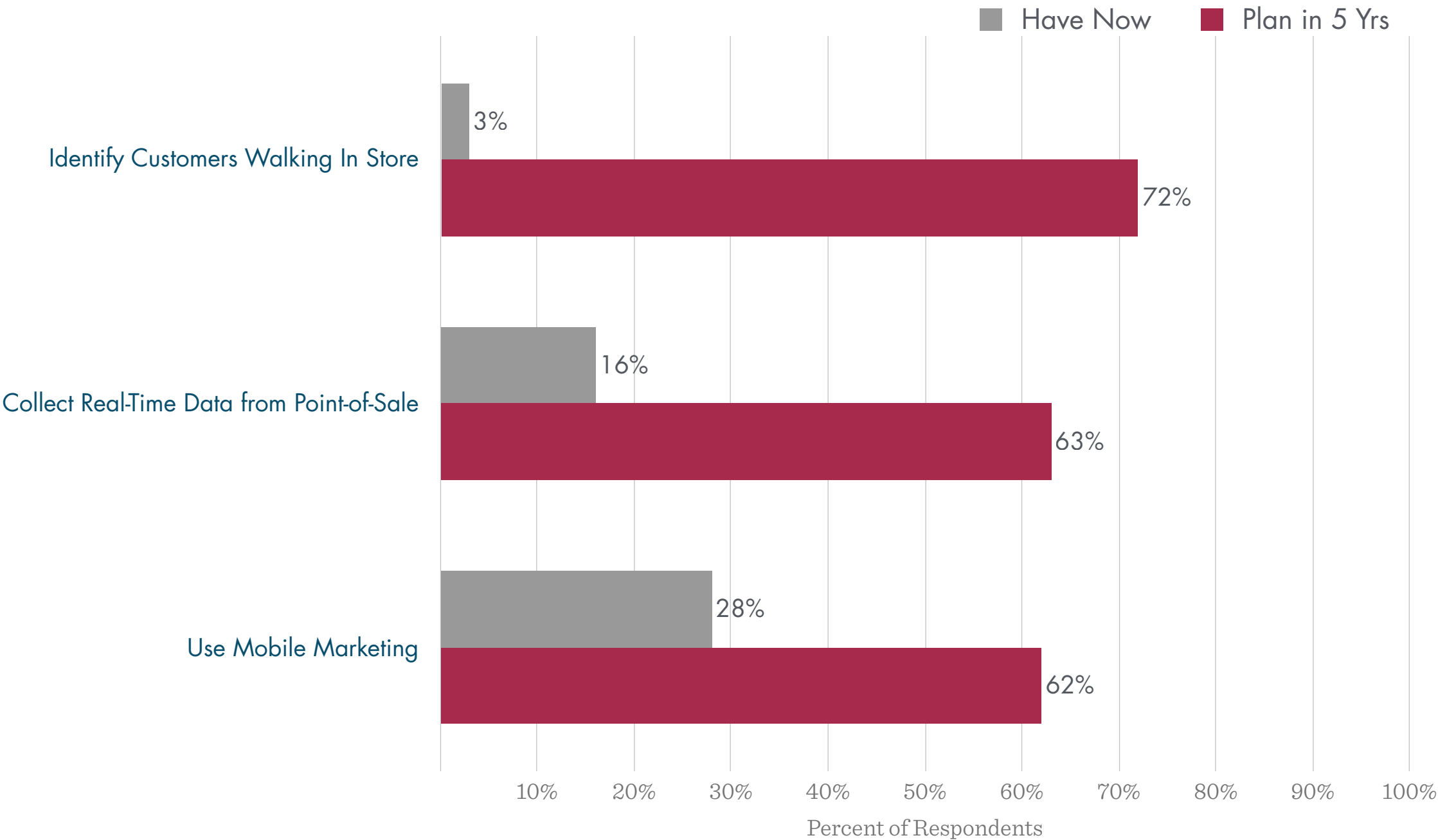


Retailers' area of investment over the next 18 months



Stores Hope Mobile Will Improve Offline Experience

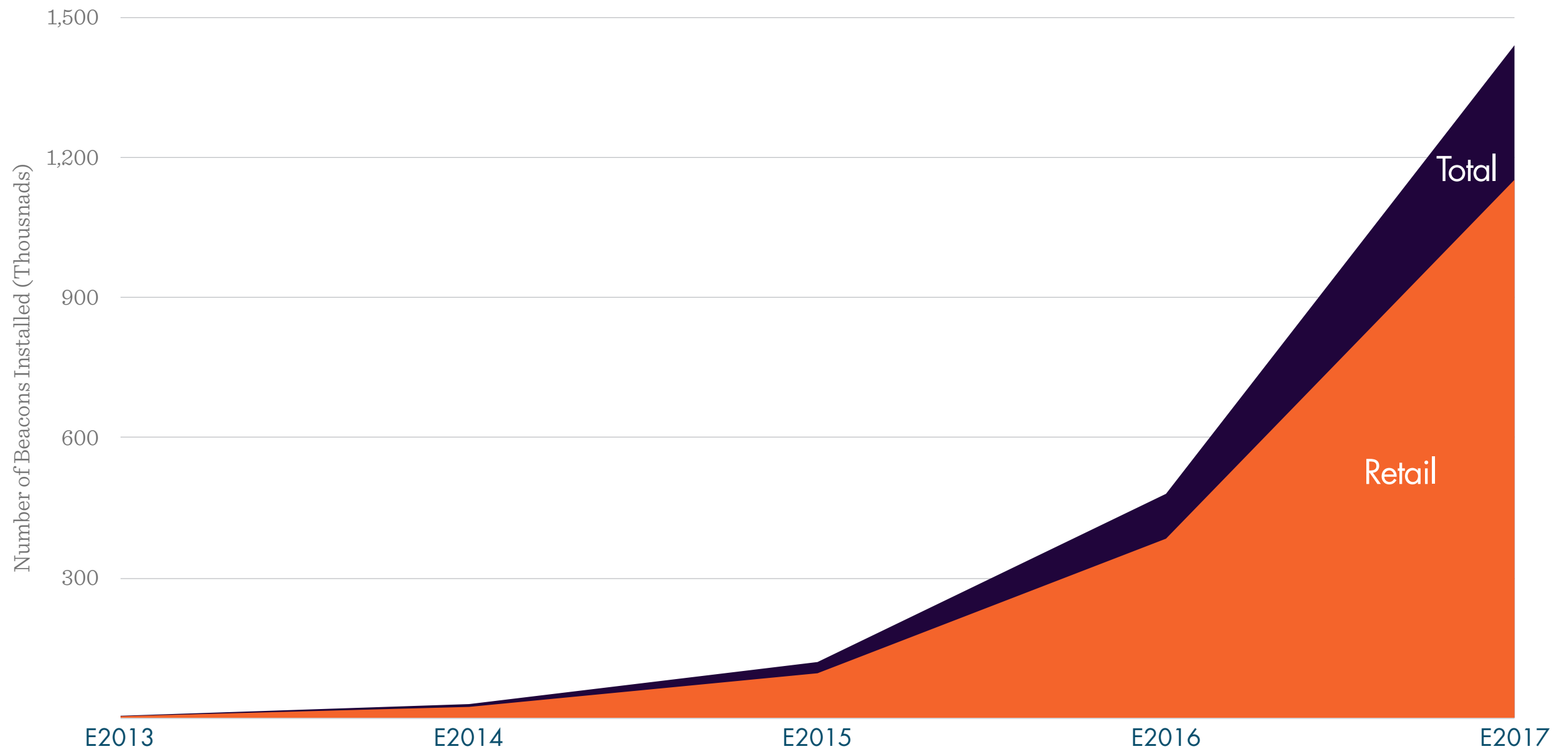
Mobile commerce initiatives North American stores have today or plan to have in 5 years



Beacon Installation Poised to Explode

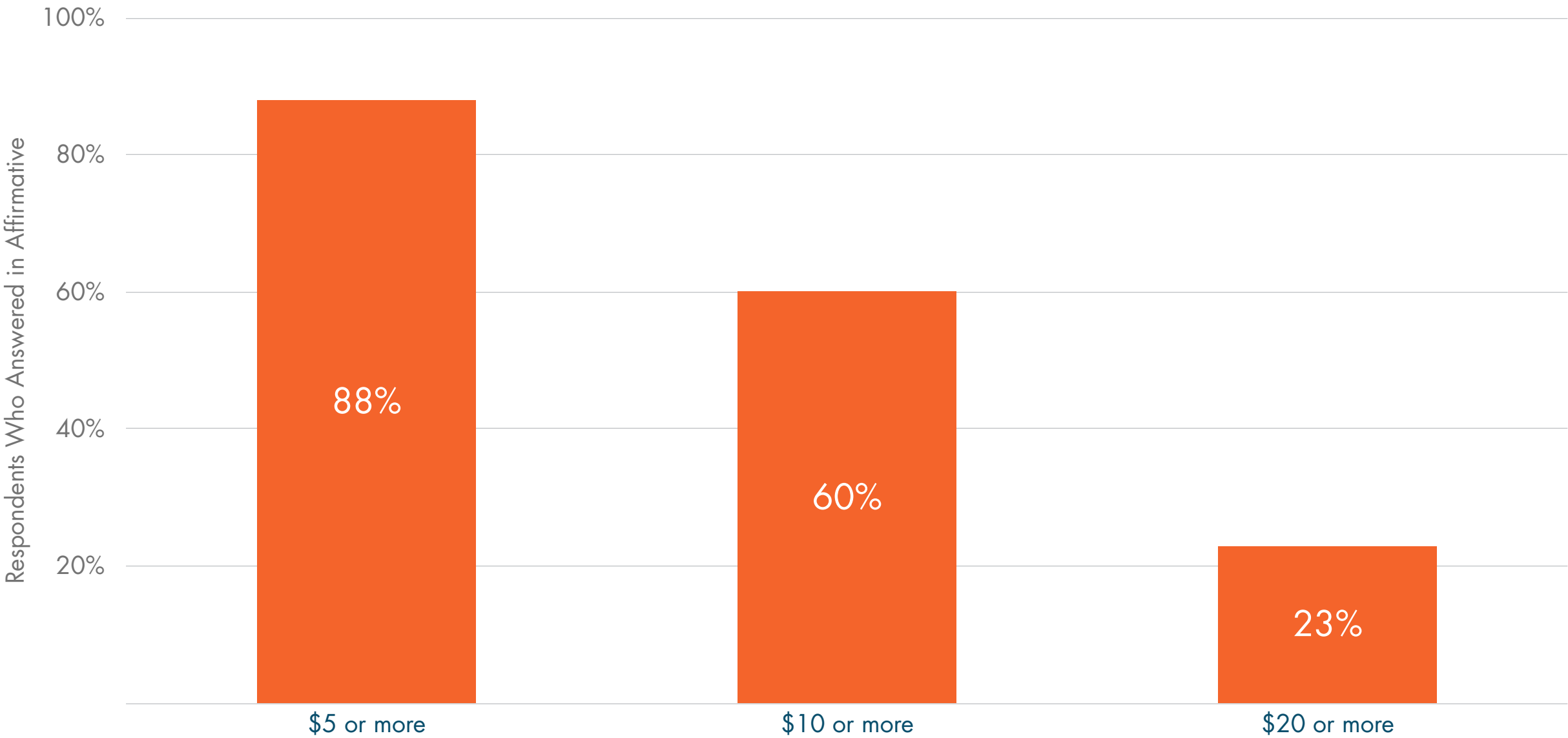


Estimated number of installed beacons by 2017



Consumers Unwilling to Pay Much for Same Day

How much US adults say they are willing to pay for same day shipping in 2014





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Contact learn@percolate.com for more information
or request a demo today at percolate.com/request-demo