

RETAIL GROWTH EXTENDS BEYOND AMAZON & WALMART

74%

GROWTH IN SPEND ACROSS ECOMMERCE

when comparing
October 2021 sales to
October 2019 sales

10%

GROWTH IN SPEND ACROSS ECOMMERCE

when comparing
October 2021 sales to
October 2020 sales



While Amazon and Walmart continue to enjoy the lion's share of online sales this holiday season, we thought it would be instructive to look at what the data says about other retailers. And while individually they don't have the heft of an Amazon or a Walmart, in the aggregate, these retailers represent a significant percentage of overall sales. In a year when consumers have shifted their buying behaviors to suit their wants, needs and even values, it makes sense to shift our focus to companies that are perhaps less in the spotlight.

Traditional expectations are that Black Friday and Cyber Monday kick off a season that helps close out the retailer's year with a boost to revenues. This year, with continued concerns over the pandemic, supply chain fulfillment issues rampant, and the inflation "print" growing, the holiday buying season kicked off in earnest even earlier than usual. Our data shows that in the 2021 year-to-date ecommerce landscape, only a handful of months, among them October, have seen month-over-month growth. The other months were March, June (Prime Day), August (Back to School). October's growth was likely driven by early pre-Black Friday shopping, and the data we've seen supports the theory that the holiday shopping season got an early start across all retail.

Arrive Early, Keep Shopping: Advanced Holiday Spend Experienced by All

When we compared the early holiday spend of 2021 to the pre-pandemic holiday spend—excluding Amazon and Walmart—we saw **74 percent growth**. And when we compare October 2021 to October 2020, we see a **lift of 10 percent**. We anticipate this to be a sign of early holiday buying. Let's look at this in terms of some non-Amazon, non-Walmart retailers.

Target, Costco, and Sam's Club performed even more strongly during this same period. These retailers realized triple digit growth compared to 2019— Target with a gain of **169 percent**, Costco gained **136 percent**, and Sam's Club with an increase of **194 percent** with continued growth when compared to 2020. This growth continued this year with **Target gaining 29 percent**, **Costco growing 7 percent**, and **Sam's club increasing 21 percent**.

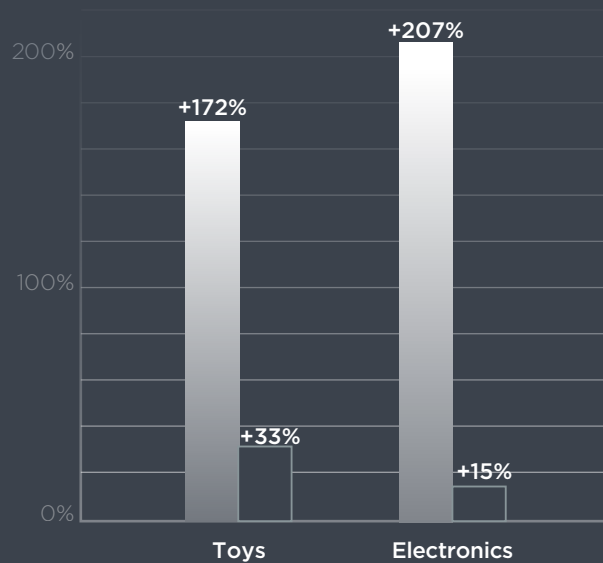


Source: 1010data Market Intelligence eCommerce Panel Monthly Year-over-Year October Growth from 2019 through 2021 for electronics, toys, health & beauty, video games and clothing categories



Sales % Change YoY

■ Oct '21 vs. Oct '19 □ Oct '21 vs. Oct '20



Crunching the numbers for October 2021 vs. October 2019, we see that **Target increased its Toy sales by 172 percent** and **sales of Electronics went up by 207 percent**. When we view the same time frame from 2021 vs. 2020 we see an **increase of 33 percent in Toys sales** and of **15% in Electronics sales**.

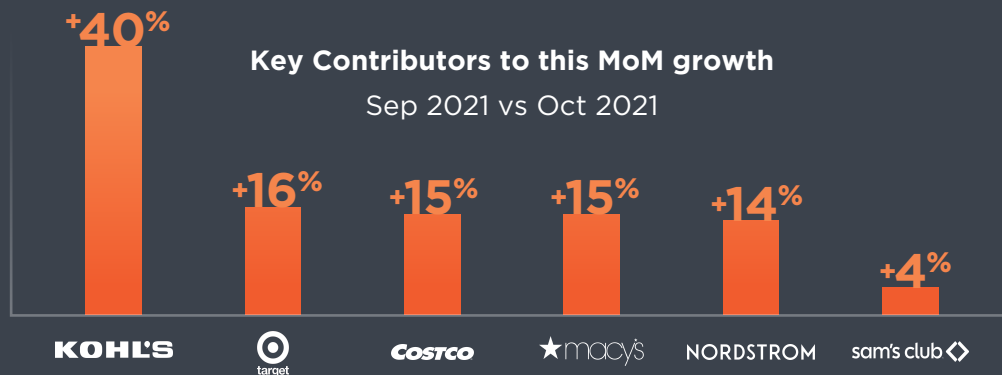
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Again, by showing the categories that drove that growth in month-over-month spend, we can make a clear connection between this stupendous sales growth and early holiday spend.

What Growth Looks Like When You're Not an Amazon or a Walmart

When we exclude Amazon and Walmart from the sales data for September 2021 to October 2021 some key contributors to month-over-month growth emerge. Strong sales bumps from **Kohl's (up 40 percent)** were followed at some distance by **Target (up 16 percent)**, **Costco (up 15 percent)**, **Macys (up 15 percent)**, and **Nordstrom (up 14 percent)**. Though **Sam's Club** trailed the pack, it still came out with an **increased sales growth of 4 percent** during that month.

Even with growing concern over supply chain issues and product availability, coupled with the ongoing pandemic these all saw early online growth this holiday season.



Source: 1010data Market Intelligence eCommerce Panel Monthly Year-over-Year October Growth from 2019 through 2021 for electronics, toys, health & beauty, video games and clothing categories

Key Holiday Category Spend Growth for September 2021 vs. October 2021

Looking at total ecommerce sales among all merchants, our data shows that the month-over-month lift from September 2021 to October 2021 was driven by Electronics (up 4 percent), Clothing (up 16 percent), Toys (up 94 percent), and Video Games (up 106 percent).



Source: 1010data Market Intelligence eCommerce Panel Monthly Year-over-Year October Growth from 2019 through 2021 for electronics, toys, health & beauty, video games and clothing categories

The data shows that retailers who were able to meet their customers' needs—delivering the correct product through the preferred channel through which the customer wished to purchase it—were able to successfully entice holiday shoppers not only to buy early, but to continue to buy from them throughout the season. Not just from the biggest players.

HOW CAN WE HELP YOU STAY AHEAD OF SHIFTING, ONLINE CONSUMER TRENDS?

The statistics in this Holiday Shopping Online Trends Spotlight were generated by the 1010data eCommerce Suite, which offers access to our timely data updates across the broadest category coverage in the marketplace. Companies leverage our data intelligence solutions to better understand digital shopping behaviors and monitor brand performance within today's online consumer journey from the path-to-purchase and beyond.

Contact info@1010data.com for more information.

eCommerce Data

Although 1010data utilizes multiple panels that track millions of panelists, 1010data is projecting up to the total U.S. population. Panel-based projections are not intended to perfectly correlate to actual sales on an absolute dollar sales basis. The strength of 1010data's ecommerce data lies in share performance and trends over time.

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