

March 2020

US COMMERCE SNAPSHOT

Total retail sales* in the US are growing at a healthy rate, supported by rising ecommerce sales. This, in large part, is due to the efforts of industry titans such as Amazon; the first-ever trillion-dollar holiday shopping season in 2019; and new customer-first options like click-and-collect. eMarketer has created this infographic Snapshot of the US retail market, which includes our figures for total sales, ad spending and shoppers and buyers by device, to help marketers in the retail ecosystem understand their customers and competitors.

**While the full effects of COVID-19 remain to be seen, the retail industry will certainly be impacted. What we currently do not know is the full extent of the impact. This Snapshot provides the best estimates of the US retail ecommerce industry with the data presently available, and was completed in February 2020, prior to any mitigation efforts put in place by US retailers and the government.*

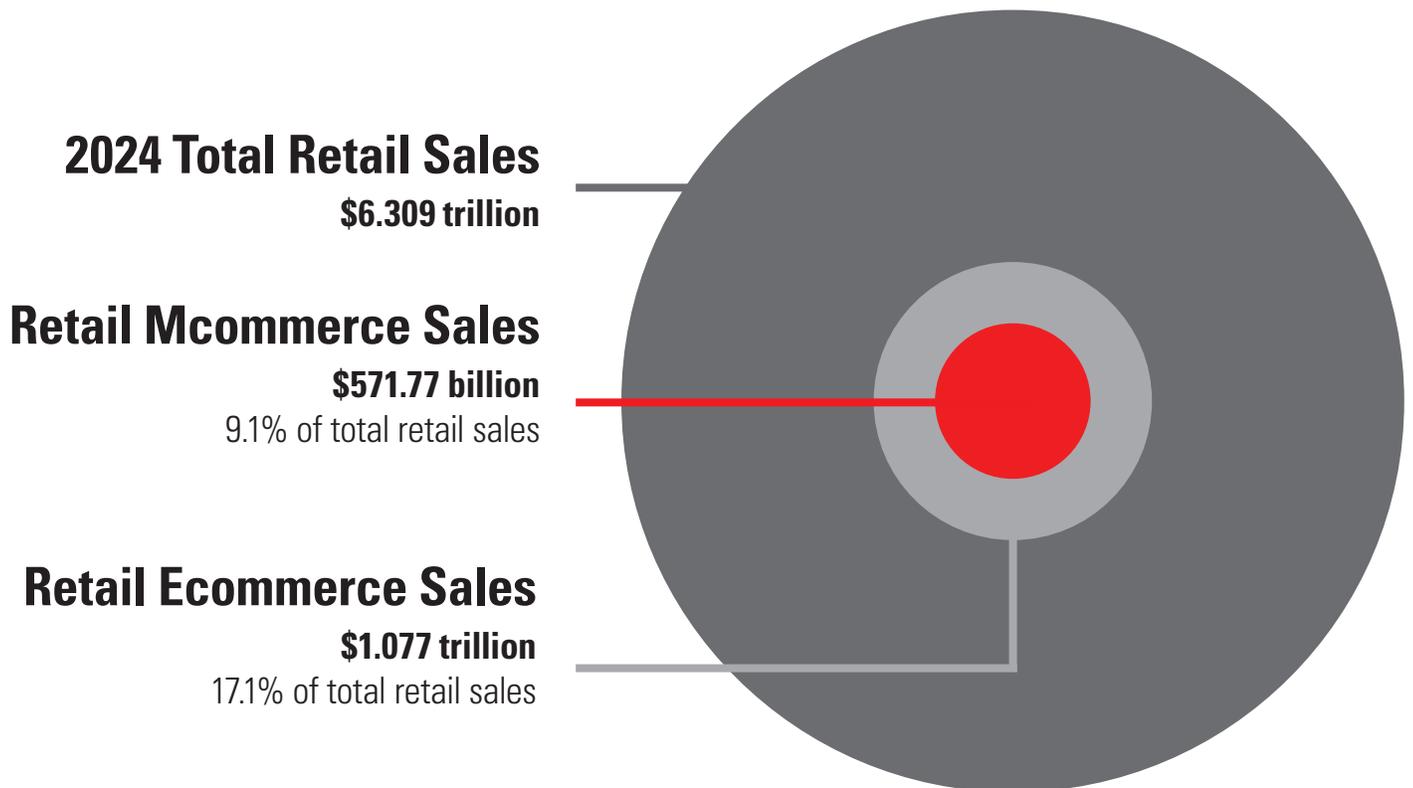
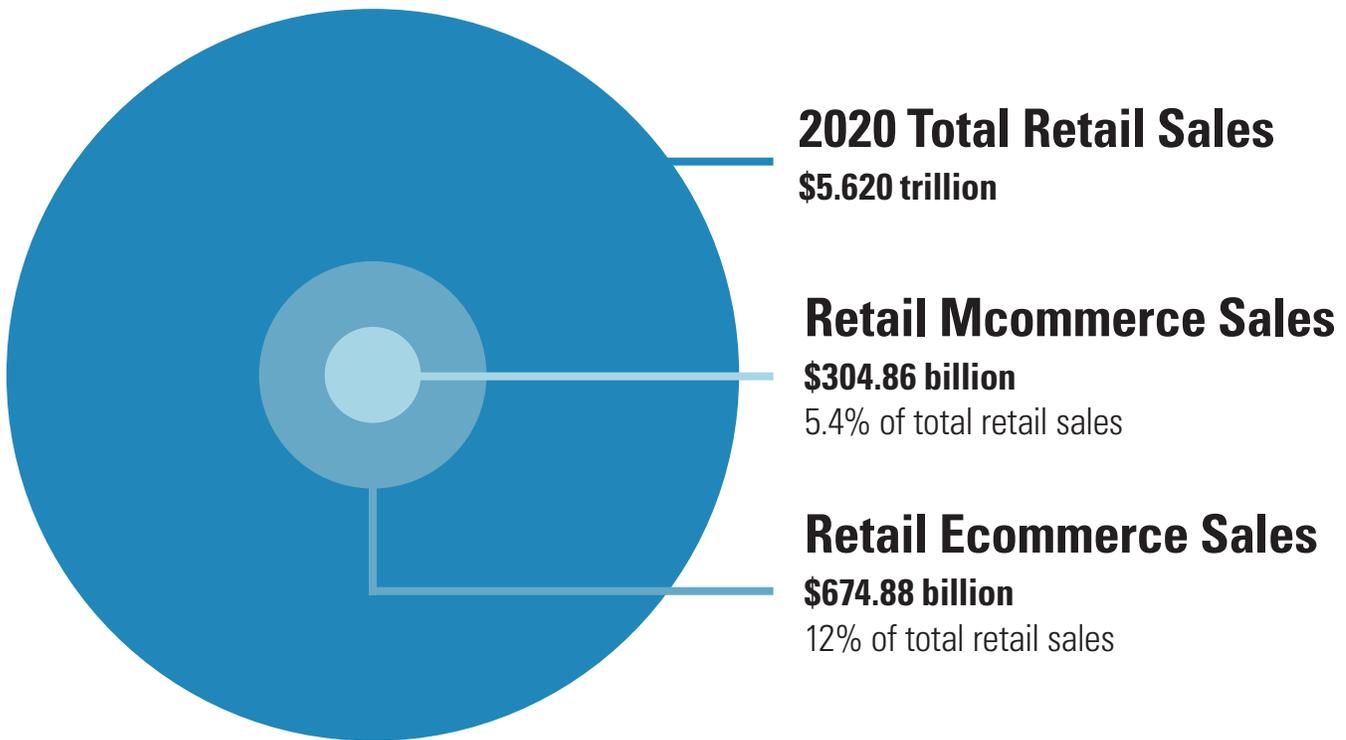
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Sizing the US Retail Market, Online and Offline

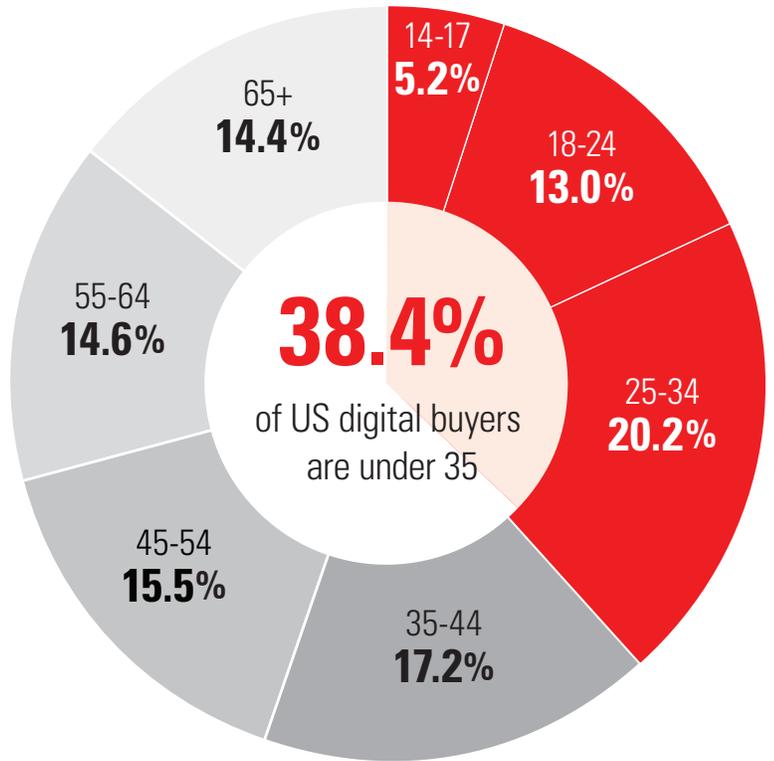
Total retail sales continue to increase steadily, thanks in large part to digital commerce. Ecommerce is expected to grow rapidly, and will continue to represent a growing portion of total sales, rising from 12% in 2020 to 17.1% by 2024. And while mobile still accounts for a small 5.4% of all retail in 2020, by 2024, its share will represent 9.1% of the total.





Who's Shopping Digitally—and on Mobile?

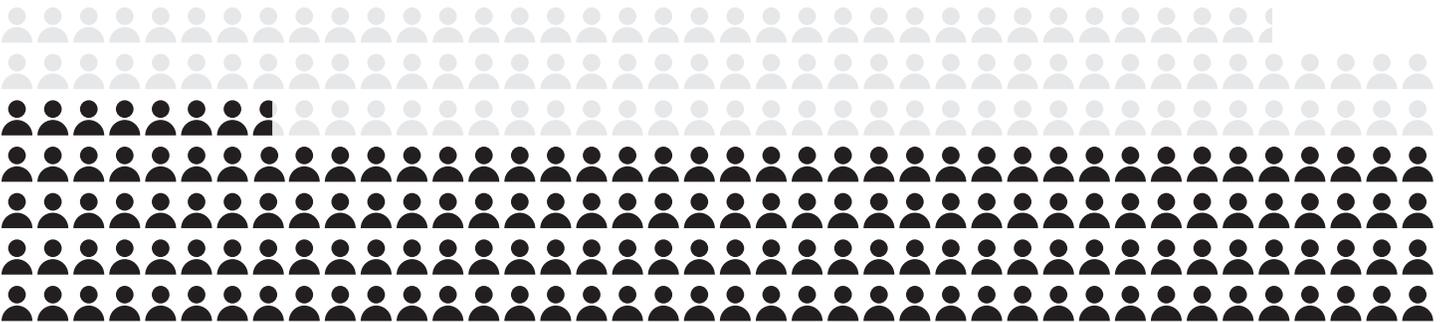
eMarketer estimates that this year, 229.3 million people in the US ages 14 and older browsed or researched products on the internet, though they did not necessarily make a digital purchase. Just 88.0% of that group did buy something via digital means at least once this year. By 2024, the US digital buyer population will reach 219.1 million.



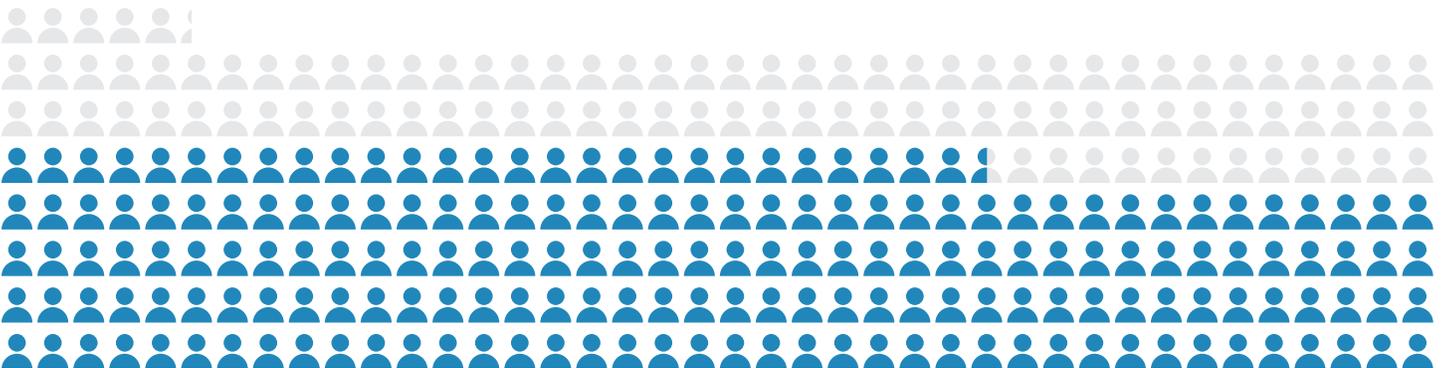
Mobile buyers as % of population (14+)

2020 167.77 million 60.9% of population (14+ pop: 275.4 million)

= 1M



2024 187.50 million 66% of population (14+ pop: 284.2 million)





Holiday 2019 Review and Looking Ahead to 2020 Planning

Total retail spending was up 3.7% to \$1.007 trillion last year, marking the first-ever trillion-dollar holiday season. We predict the 2020 holiday season will see overall growth rates soften amid signs of a weakening consumer economy.

Retail Holiday Season Sales

2019 \$1.007 trillion



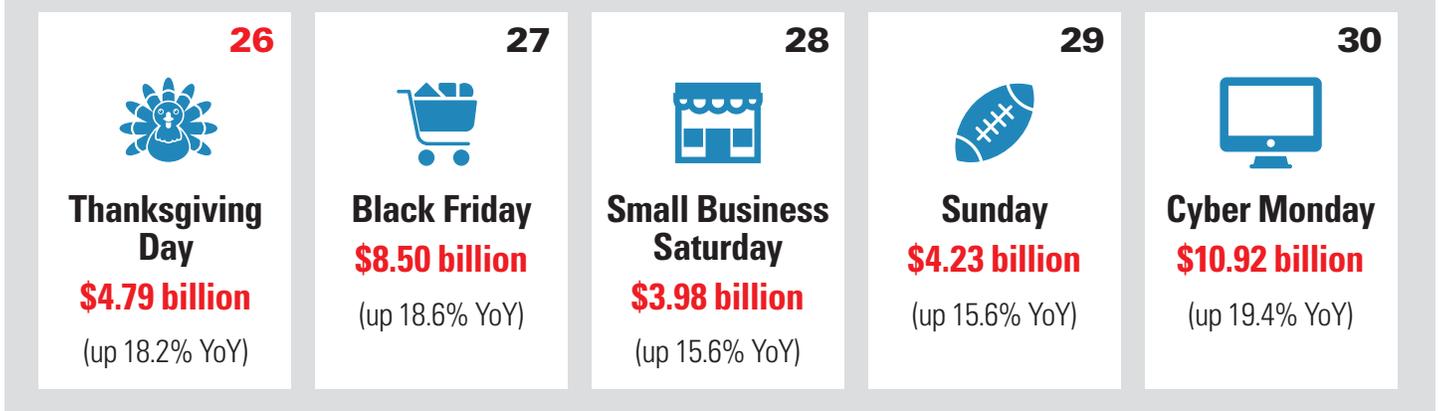
2020 \$1.042 trillion



Cyber Five 2020 Predictions

We predict Cyber Monday will be the heaviest online spending day in 2020, jumping 19.4% to \$10.92 billion. Black Friday will post a similar strong gain of 18.6%, reaching \$8.50 billion as the second-heaviest day, followed by an 18.2% increase to \$4.79 billion on Thanksgiving.

November 2020



CHALLENGING TIMES CALL FOR **A PARTNER** **YOU CAN COUNT ON.**

It's more crucial than ever for enterprise retail marketers like you to identify your best customers and prospects across channels, devices, platforms to measure the impact and value of your marketing investment, and optimize as needed. Retail brands will also want to know future customer prospects—those who may not yet be in the market—to ensure you are their preferred brand when they are ready to buy.

To ensure your marketing investment is well spent, you need to partner with a true leader in advanced marketing analytics and identity, one with exceptional data management expertise and partnerships, including with walled gardens and TV data providers. That is where Neustar comes in.



“Consider Neustar if you want a deep customer-level marketing performance measurement solution packaged in a powerhouse analytics tool.”

– The Forrester Wave™: Marketing Measurement And Optimization Solutions, Q1 2020

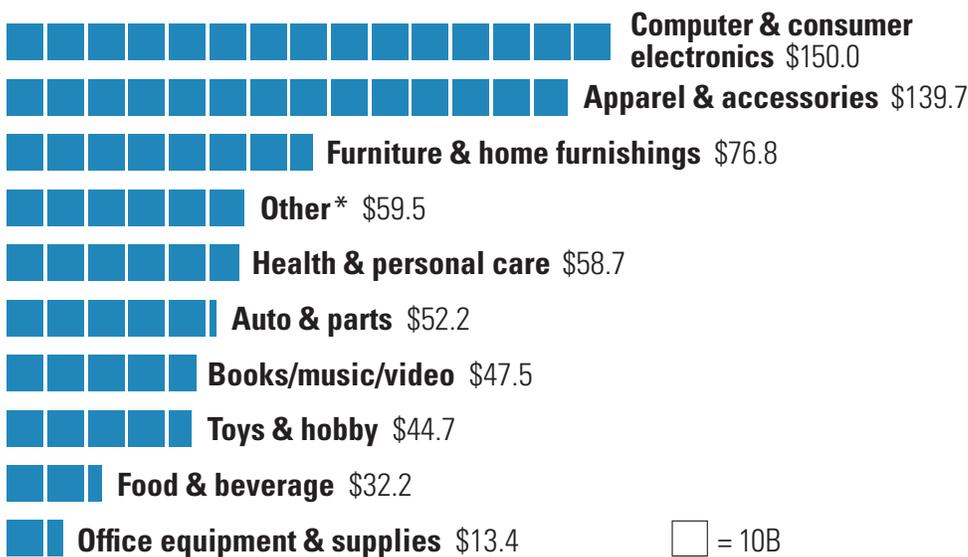
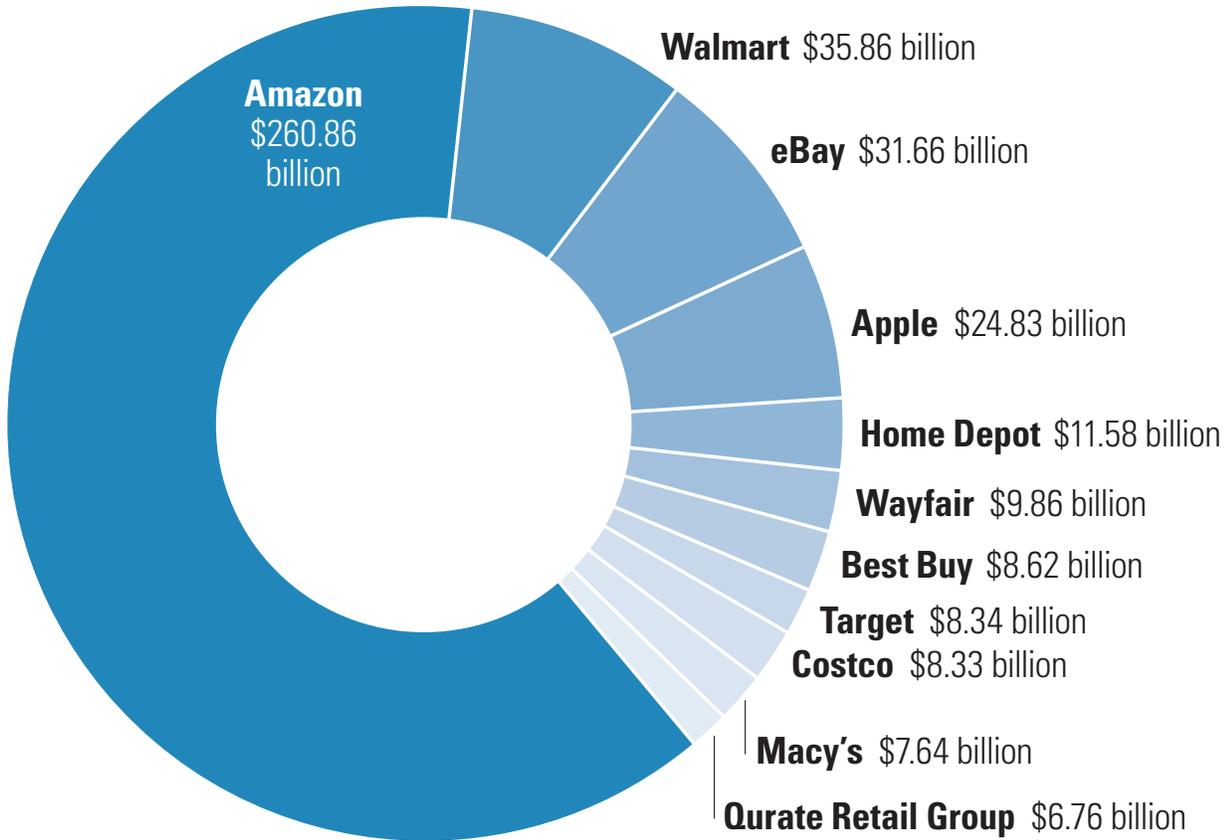
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Where and What Digital Shoppers Are Buying

Big-box retailer Target, which used to rank No. 11 in the US in terms of ecommerce sales, has now surpassed three competitors to become No. 8. Its ecommerce business will jump 24.0% to \$8.34 billion. Click-and-collect is a major driver of growth for some of the top 10 companies, like Target, Home Depot, Best Buy and Walmart.



US Click-and-Collect Sales

2019
\$36.54 billion
54.9% change

2020
\$50.66 billion
38.6% change



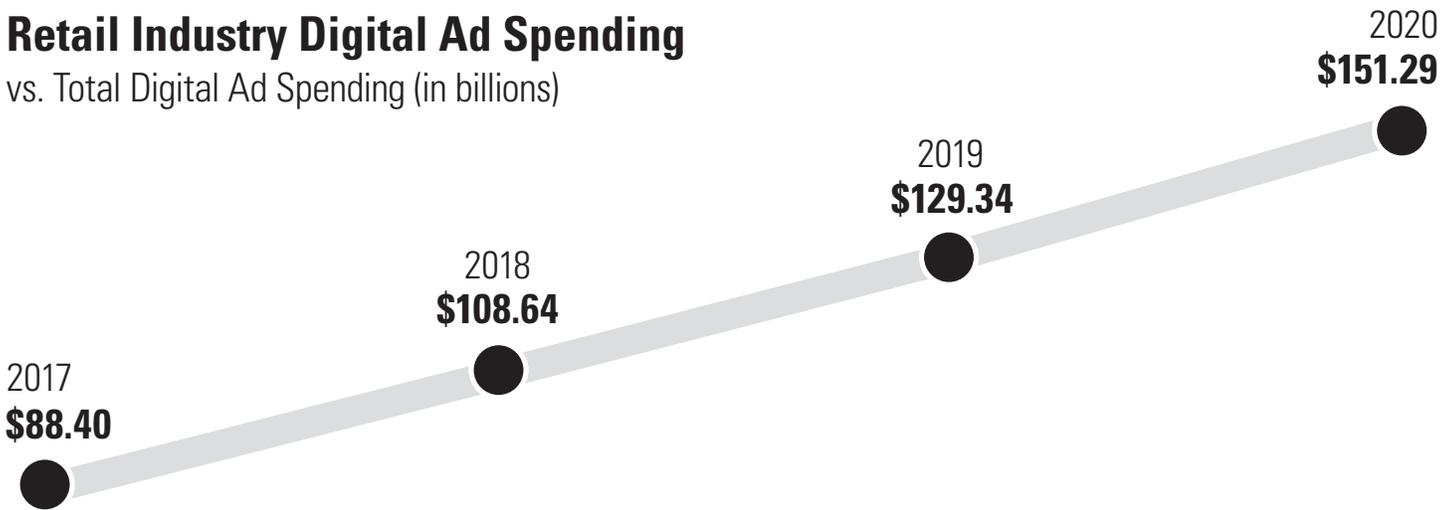


Retailers Spend Big on Digital Ads

The retail industry is the biggest digital ad spender in the US—by a significant margin. This year, 21.9% of all US digital ad spending will come from retail, unchanged from 2019. Its share of the total will remain the same through 2020, since it's expected to grow at the same rate as overall digital ad spending.

Retail Industry Digital Ad Spending

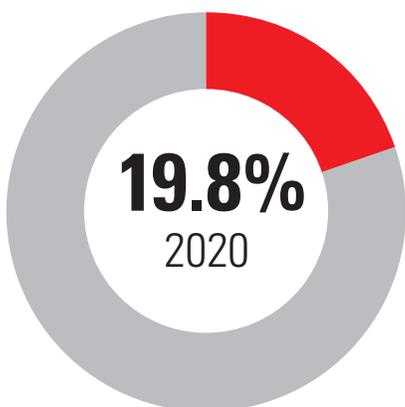
vs. Total Digital Ad Spending (in billions)



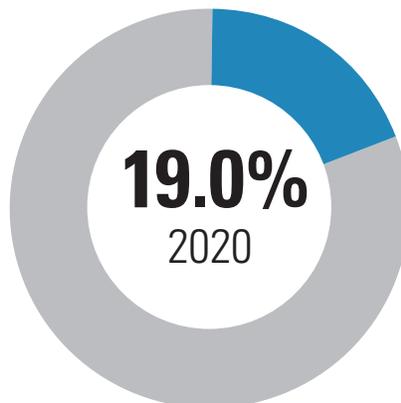
Retail Digital Display, Video & Search Ad Spending

as a % of Total Digital Ad Spending in each format

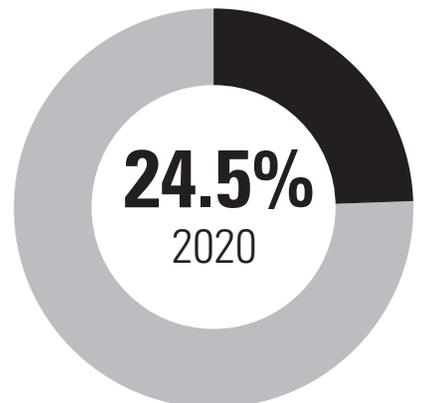
Retail as a % of Digital Display



Retail as a % of Digital Video



Retail as a % of Search





Coverage of a Digital World

eMarketer data and insights address how consumers spend time and money, and what marketers are doing to reach them in today's digital world. [Get a deeper look at eMarketer coverage](#), including our reports, benchmarks and forecasts, and charts. Receive daily insights to your inbox. Subscribe to [eMarketer's complimentary newsletters](#).



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