

US Cyber Monday results

RESTON, US: comScore has reported holiday season retail e-commerce spending for the first 30 days of the November-December 2012 holiday season. For the holiday season-to-date, US\$20.4bn has been spent online, marking a 15% increase versus the corresponding days last year.



The most recent week saw three individual days eclipse US\$1bn in spending, led by Cyber Monday, which became the heaviest online spending day on record at US\$1.46bn. Tuesday, November 27 reached US\$1.26bn, while Wednesday, November 28 reached US\$1.11bn. Monday and Tuesday of this past week currently rank as the two heaviest online spending days in history, with the Tuesday total slightly outpacing that of Cyber Monday 2011.

2012 Holiday Season To Date vs. Corresponding Days* in 2011 Non-Travel (Retail) Spending Excludes Auctions and Large Corporate Purchases Total US - Home & Work Locations (Source: comScore, Inc)			
	Millions (US\$)		
	2011	2012	Percent Change
November 1-30	US\$17,791	US\$20,376	15%
Thanksgiving Day (Nov. 22)	US\$479	US\$633	32%
Black Friday (Nov. 23)	US\$816	US\$1,042	28%
Thanksgiving Weekend (Nov. 24-25)	US\$1,031	US\$1,187	15%
Cyber Monday (Nov. 26)	US\$1,251	US\$1,465	17%
Cyber Week (Nov. 26-Nov. 30)	US\$4,928	US\$5,462	11%

*Corresponding days based on corresponding shopping days (November 3 thru December 2, 2011)

"Cyber Monday kicked off Cyber Week with a record spending total of US\$1.46bn, but the 'sugar high' appears to be somewhat short-lived," said comScore chairman Gian Fulgoni. "While we still saw three billion dollar days this week, growth rates dampened following the peak demand of the Thanksgiving-to-Cyber Monday promotional period. This is a similar pattern to what we observed last year. In addition, unseasonably warm weather throughout many parts of the country may have given consumers some added impetus to shop in-store rather than rely on online shopping."

Free shipping remains important driver of online holiday spending

More than half of e-commerce transactions during each of the past three weeks of the holiday season have included free shipping, with a peak of 57% during the week ending Sunday, November 25. During the first five weeks of the holiday season, consumers spent an average of 42% more on free shipping transactions than on paid shipping transactions, including a 51% higher average order value during the week ending November 25.

Free vs. Paid Shipping Analysis for 2012 Holiday Season Excludes Transactions from Digital Content & Subscriptions Category Total US - Home & Work Locations (Source: comScore, Inc)				
Week Ending...	Percentage of Transactions	Average Order Value		
	Free Shipping	Paid Shipping	Free Shipping	Paid Shipping
November 4, 2012	36%	64%	US\$99	US\$93
November 11, 2012	42%	58%	US\$132	US\$65
November 18, 2012	55%	45%	US\$105	US\$82
November 25, 2012	57%	43%	US\$137	US\$91
December 2, 2012*	50%	50%	US\$111	US\$91

*Includes first five days of the week through Friday, November 30, 2012

"Though retailers must often sacrifice margins when they provide free shipping, they benefit because consumers tend to spend significantly more on those transactions," added Fulgoni. "Consumers may either be responding to the minimum spending thresholds needed in order to receive free shipping, or figure that as long as they know they're receiving free shipping it might be worth adding another item or two to their shopping basket."

Smartphones & tablets drive online retail product category growth for season-to-date

Increasing adoption of smartphones and tablets continues to be a strong driver of product category sales during the online holiday shopping season. The top-gaining category for the season-to-date is Digital Content & Subscriptions, which includes digital book, music and video downloads, which has grown 25% versus year ago. The Consumer Electronics category, despite softening growth in flat panel TV sales, ranks 4th at 17% growth, largely on the strength of smartphone sales. The Computer Hardware category is seeing gains of 15% on the strength of tablet sales, despite traditional laptop and desktop computers posting more modest gains. Other categories currently performing well include Toys (up 21%), Consumer Packaged Goods (up 18%) and Video Game Consoles & Accessories (up 16%).

Top Gaining Product Categories for Holiday Season-to-Date Nov 1-30, 2012 vs. Corresponding Shopping Days in 2011 Total US - Home & Work Locations (Source: comScore, Inc)	
	Percent Change
Digital Content & Subscriptions	25%
Toys	21%
Consumer Packaged Goods	18%
Consumer Electronics	17%
Video Game Consoles & Accessories	16%

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