

# US season-to-date exceeds US\$30bn

RESTON, US: comScore, a leader in measuring the digital world, today reported holiday season retail e-commerce spending for the first 46 days of the November - December 2011 holiday season. For the holiday season-to-date, US\$30.9bn has been spent online, marking a 15% increase versus the corresponding days last year.



The most recent work week (Dec. 12-16) saw four individual days surpass US\$1bn in spending, led by Green Monday (Monday, December 12) with US\$1.13bn and Free Shipping Day (Friday, December 16) with US\$1.07bn. With the heaviest portion of the season behind us, Cyber Monday appears likely to rank as the heaviest online spending day of the year for the second consecutive season.

## 2011 Holiday Season To Date vs. Corresponding Days\* in 2010 Non-Travel (Retail) Spending Excludes Auctions and Large Corporate Purchases Total US - Home & Work Locations (Source: comScore, Inc)

	Millions (US\$)		
	2010	2011	Percent Change
November 1 - December 16	US\$26,914	US\$30,937	15%
Thanksgiving Day (Nov. 24)	US\$407	US\$479	18%
Black Friday (Nov. 25)	US\$648	US\$816	26%
Thanksgiving Weekend (Nov. 26-27)	US\$886	US\$1,031	16%
Cyber Monday (Nov. 28)	US\$1,028	US\$1,251	22%
Green Monday (Dec. 12)	US\$954	US\$1,133	19%
Free Shipping Day (Dec. 16)	US\$942	US\$1,072	14%
Week Ending Dec. 16	US\$5,508	US\$6,315	15%

\*Corresponding days based on corresponding shopping days (November 2 thru December 17, 2010)

"More than US\$1bn in spending on Free Shipping Day put the exclamation point on what will almost certainly be the heaviest week of the online holiday shopping season," said comScore chairman Gian Fulgoni. "Four individual days surpassed US\$1bn in spending this week, with Green Monday leading the way at US\$1.13bn. While next week may see another strong day or two at the beginning of the week, it's clear that we have now reached the crescendo for this season and that spending will begin to slow as we get closer to Christmas, leaving Cyber Monday as the top ranked shopping day for the second year in a row."

## Have holiday promotions been frontloaded this year?

Further analysis of retail e-commerce spending trends suggests that holiday deals, such as discounts and free shipping, may have been frontloaded during the earlier portion of the season. We analysed the year-over-year growth rates for the Mondays and Fridays, which represent the majority of the key promotional days for the season, between Thanksgiving and Free Shipping Day. The results showed significantly higher growth rates during the days nearer to Thanksgiving, with growth rates in the mid-20s, and more modest growth rates in the teens in the middle part of December.

## Analysis of 2011 Friday and Monday Spending Patterns between Thanksgiving and Free Shipping Day Non-Travel (Retail) Spending Excludes Auctions and Large Corporate Purchases Total US - Home & Work Locations (Source: comScore, Inc)

Friday	Spending (Millions)	YY % Chg	Monday	Spending (Millions)	YY % Chg
Nov. 25	US\$815	26%	Nov. 28	US\$1,251	27%

Dec. 2	US\$788	27%	Dec. 5	US\$1,178	25%
Dec. 9	US\$917	15%	Dec. 12	US\$1,132	19%
Dec. 16	US\$1,072	14%			

## Free shipping rates rebound during final online sales push

comScore's analysis of e-commerce transactions including free shipping indicated that following a decline in the second week of December, free shipping rebounded during this most recent week, which concluded with Free Shipping Day. Each week of the online holiday season-to-date has seen free shipping occur on at least half of all transactions. For the five-day week ending with Free Shipping Day, the percentage of transactions with free shipping reached 56%, nearly 4 percentage points higher than the corresponding time period last year.

Weekly Holiday Free Shipping Analysis Non-Travel (Retail) Spending Excludes Auctions and Large Corporate Purchases Total US - Home & Work Locations (Source: comScore, Inc)			
Week Ending	Percent of Transactions with Free Shipping		
	2010*	2011	Point Change
11/6/2011	41.8%	52.2%	+10.4
11/13/2011	44.7%	51.2%	+6.5
11/20/2011	50.2%	56.0%	+5.8
11/27/2011	55.0%	64.4%	+9.4
12/4/2011	51.7%	59.4%	+7.7
12/11/2011	51.7%	53.0%	+1.3
12/18/2011**	52.2%	56.0%	+3.8

\*Weeks based on corresponding shopping days for 2010

\*\*2011 data based on five-day week (Dec. 12-16)

"Free shipping is undoubtedly one of the most important incentives for consumers and has become a key driver of online buying activity over the past few years," added Fulgoni. "This season has seen a continuation of the trend where an increasing percentage of transactions involve free shipping, as more consumers demand it and more retailers provide it. During the week of Thanksgiving and Cyber Week we saw at least 3 in 5 transactions use free shipping, significantly higher rates than we've ever previously observed."