



October 2015

COMMERCE SNAPSHOT

Mobile commerce, and even digital commerce as a whole, still accounts for a small slice of total retail sales in the US. But far more sales are influenced somehow by digital and mobile shopping, and the US is quickly becoming a nation of consumers ready to research products on any device close to hand. eMarketer has created this Snapshot of the US retail market, including shoppers and buyers by device, sales by device and ad spending, to help marketers in the retail ecosystem understand their customers, and their competitors.

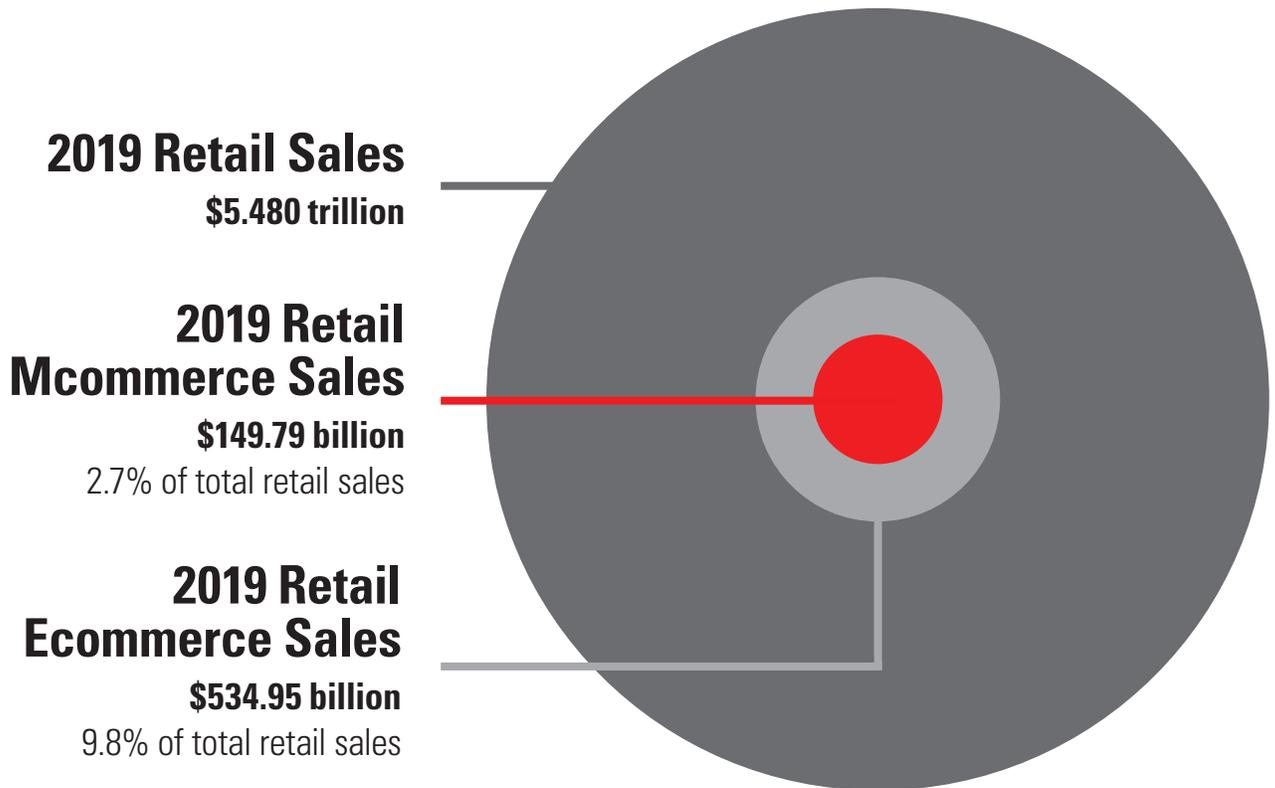
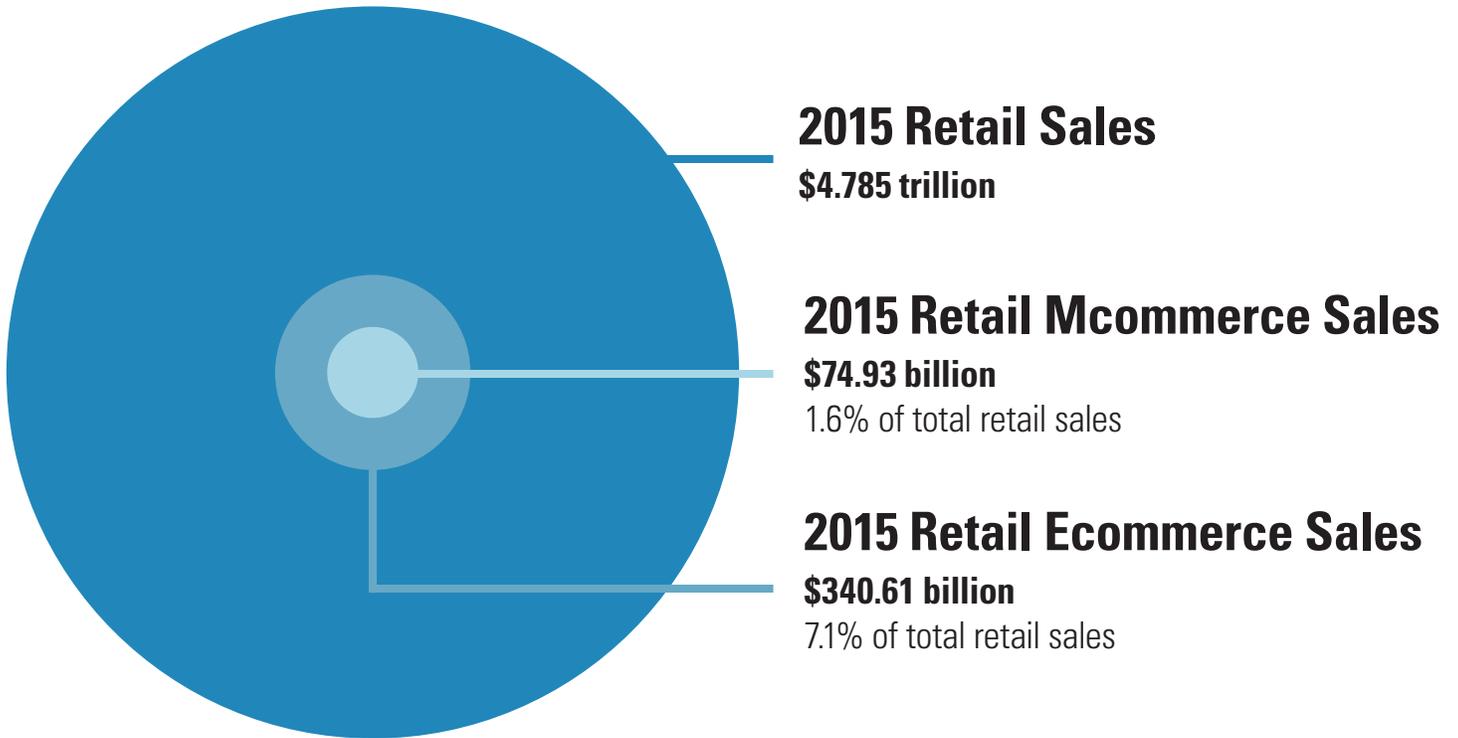
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Sizing the US Retail Market, Online and Offline

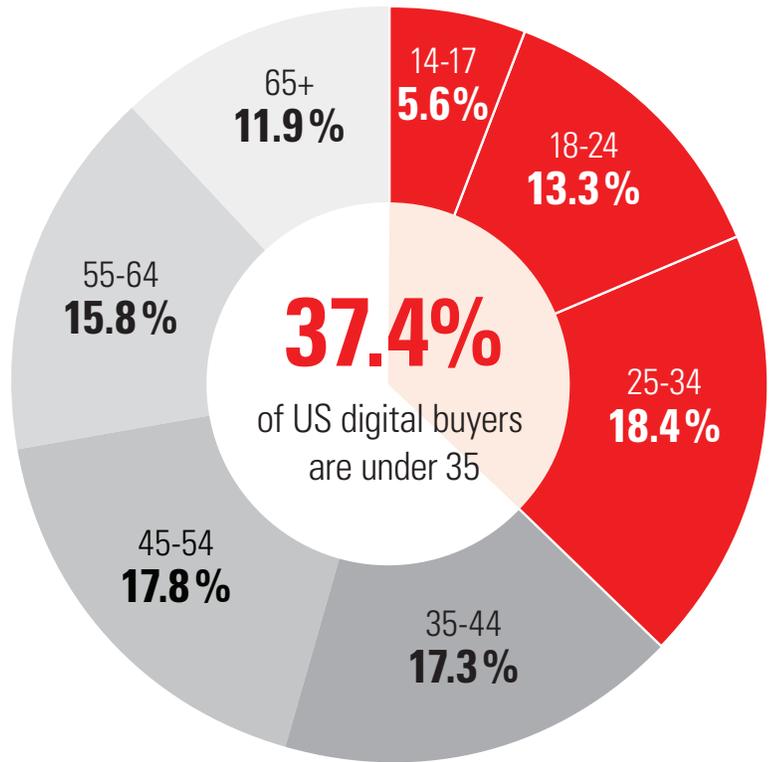
Total retail sales are growing slowly but steadily in the US. Although sales are growing more quickly on digital, ecommerce is expected to rise only slightly as a share of the total, from 7.2% this year to 9.8% by 2019. Mobile still accounts for a tiny 1.6% of all retail, and by 2019 its share will be a still-small 2.7% of the total.





Who's Shopping Digitally— And on Mobile?

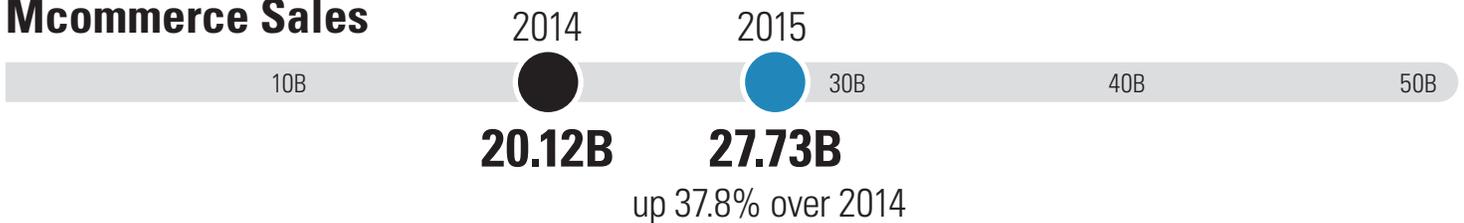
eMarketer estimates that this year, 205.0 million people in the US ages 14 and older browsed or researched products on the internet, though they did not necessarily make a digital purchase. Just 84% of that group did buy something via digital means at least once this year. By 2019, the US digital buyer population will reach 195.1 million.



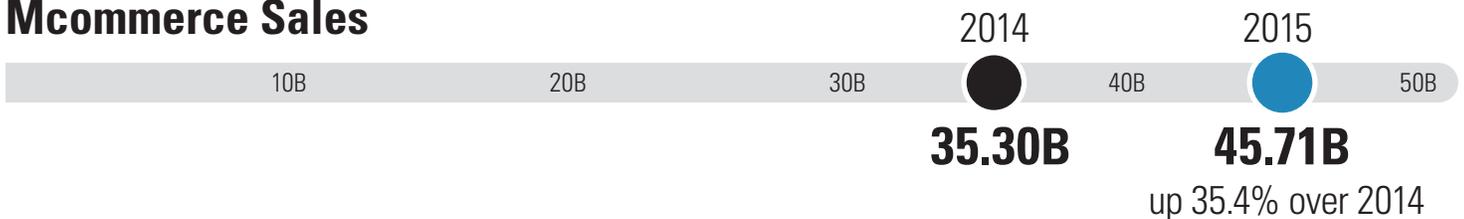
Tablet Commerce Outpaces Smartphone Retail Sales

This year, retail sales made via tablet will account for 61.0% of all US retail mcommerce sales, with most of the remainder coming from smartphones. Sales growth on smartphones will outpace that on tablets, but the larger-screened devices will hold on to nearly three-fifths of mcommerce sales through at least 2019.

Smartphone Retail Mcommerce Sales



Tablet Retail Mcommerce Sales

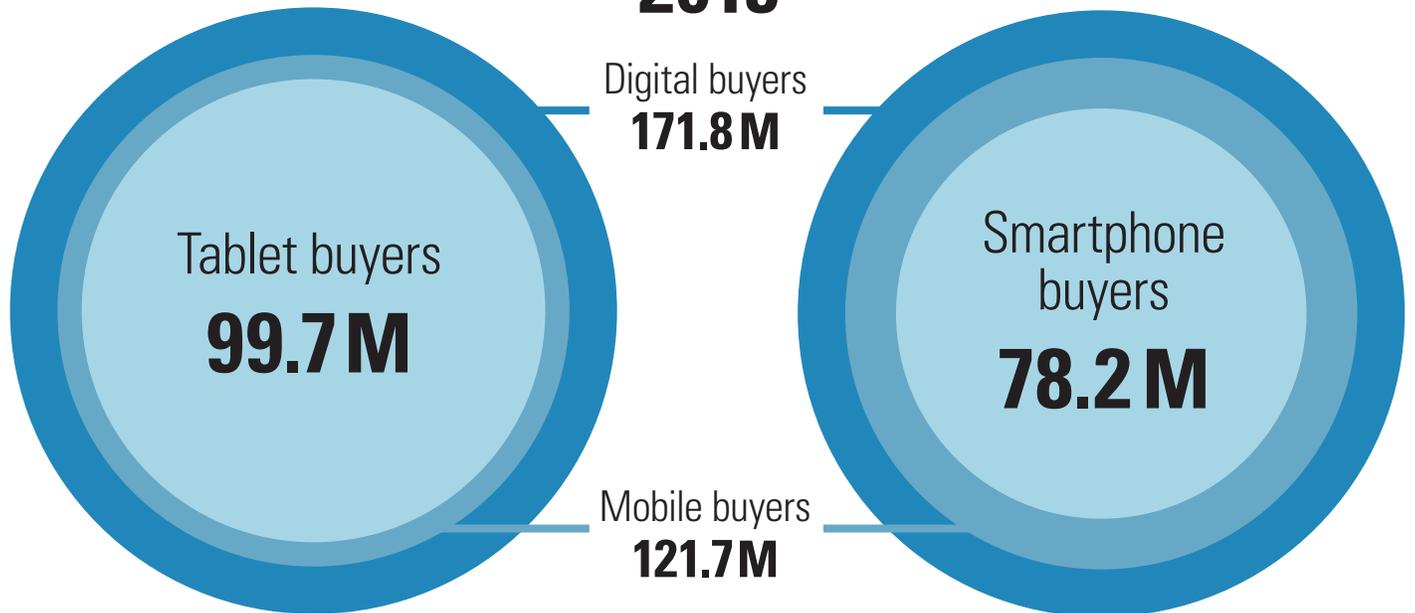


Mobile Buyers Choose Tablets

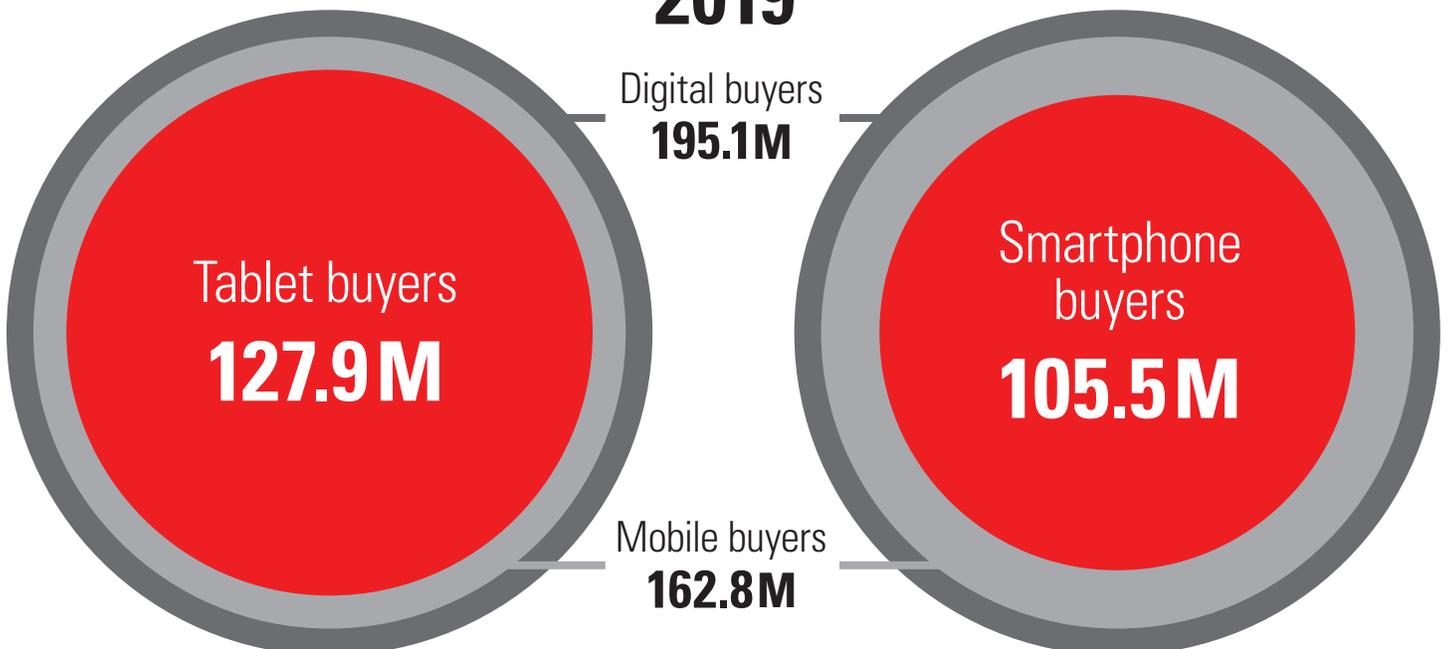
More than seven in 10 digital buyers, or 121.7 million people, will make a purchase this year via a mobile device. Though smartphones have greater overall penetration than tablets, mobile buyers who purchase via tablet will be more numerous than those who purchase via smartphone.

Nearly 171 million people in the US will browse and research products via mobile this year, though some of them will not complete a purchase that way.

2015



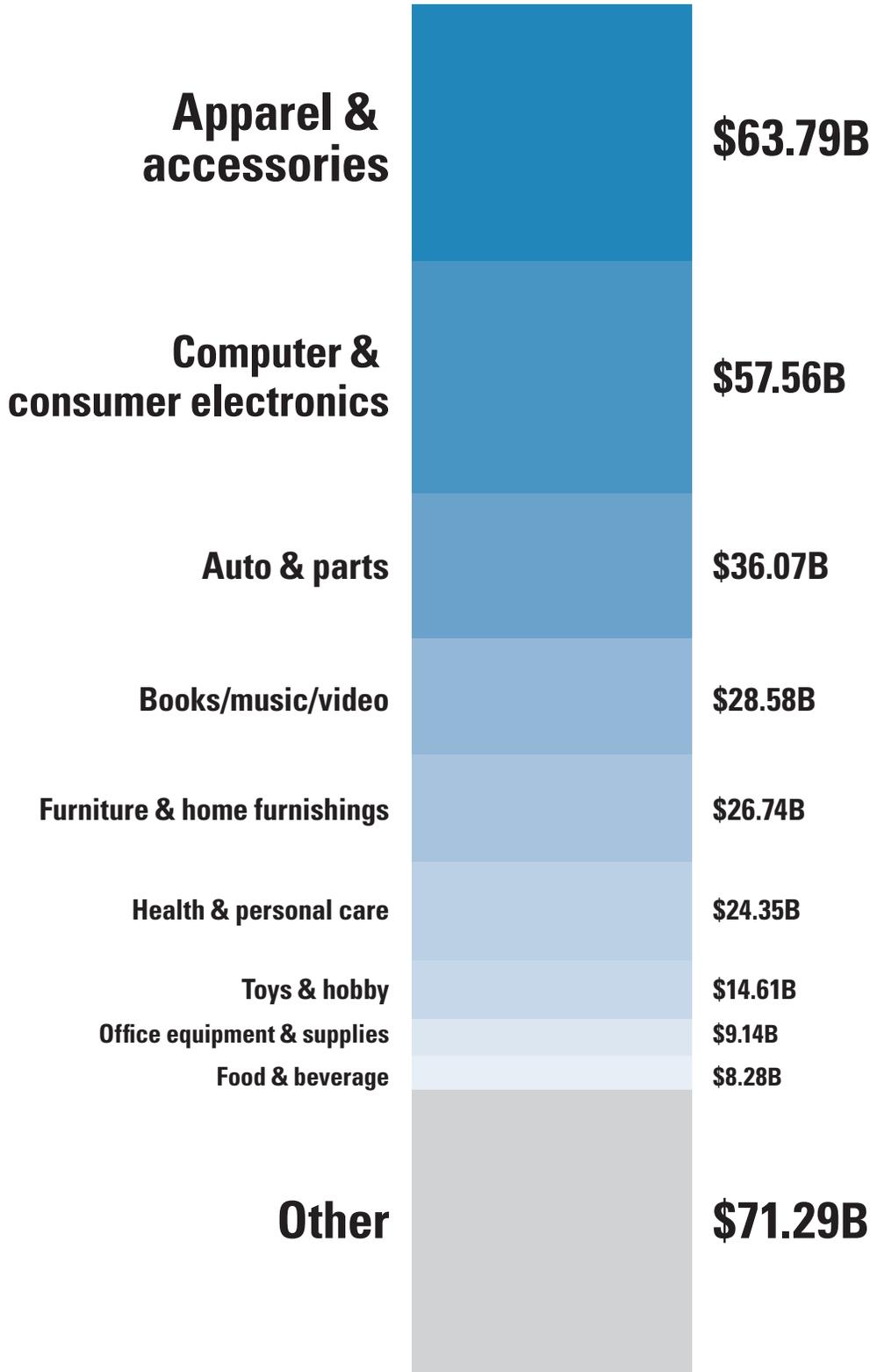
2019





What Digital Shoppers Are Buying

Apparel and accessories is the No. 1 product category sold digitally, and will retain the top spot through at least 2019. Growth is highest this year for health and personal care products, followed closely by toys and hobby, and food and beverage.



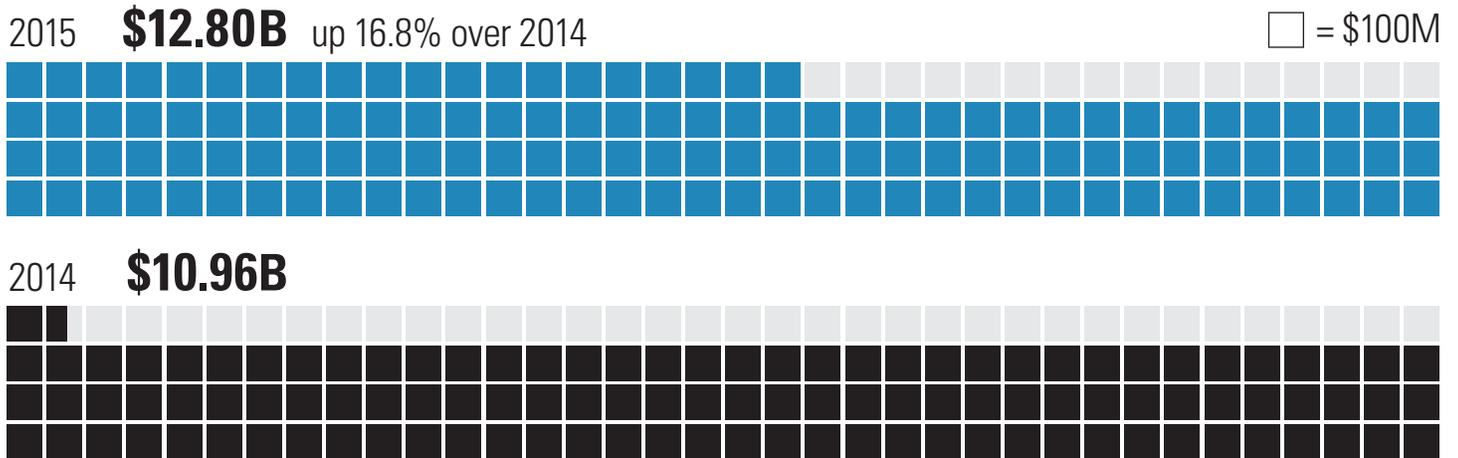
Though retail ecommerce sales growth will vary across sectors, relative rankings will not change for any product category through 2019.



Retailers Spend Big on Digital Ads

The retail industry is the biggest digital ad spender in the US—by a significant margin. This year, 22.0% of all US digital ad spending will come from retail. Its share of the total is not expected to drop for the foreseeable future.

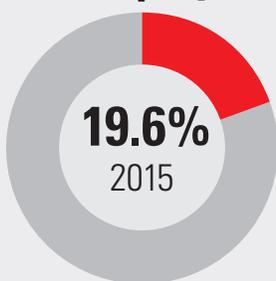
Retail Industry Digital Ad Spending



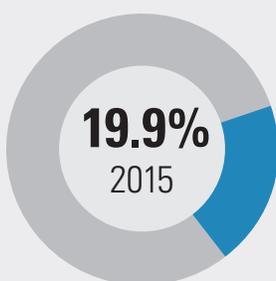
Retail Display & Video Ad Spending

as a % of Total Digital Ad Spending in each format

Display

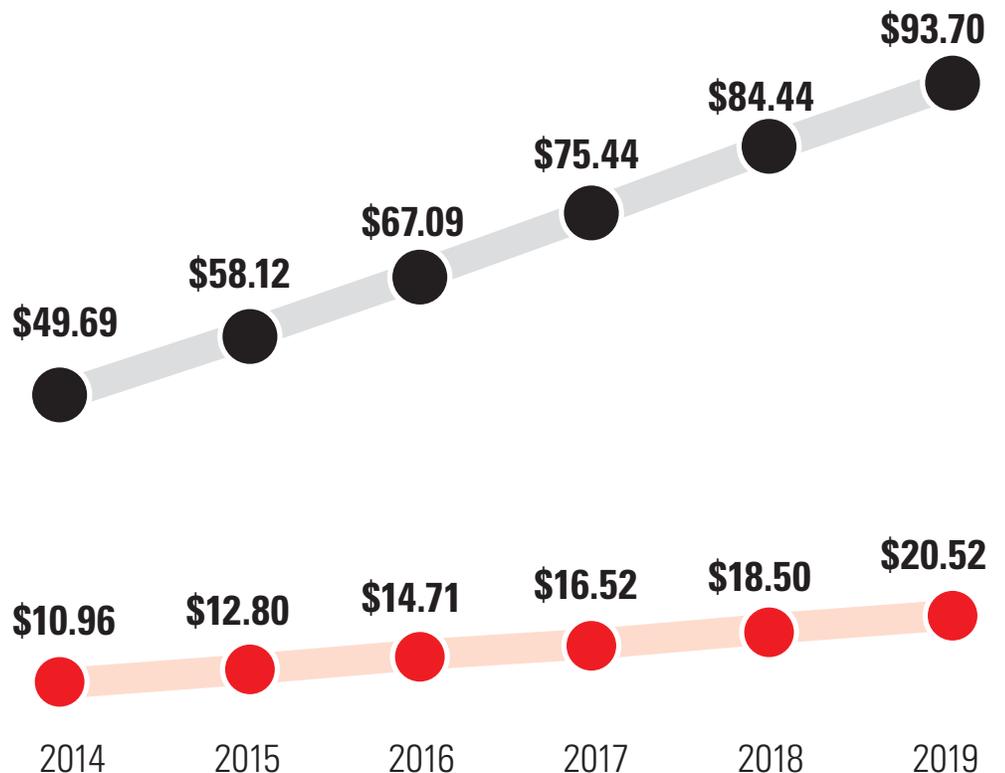


Video



Retail Industry Digital Ad Spending

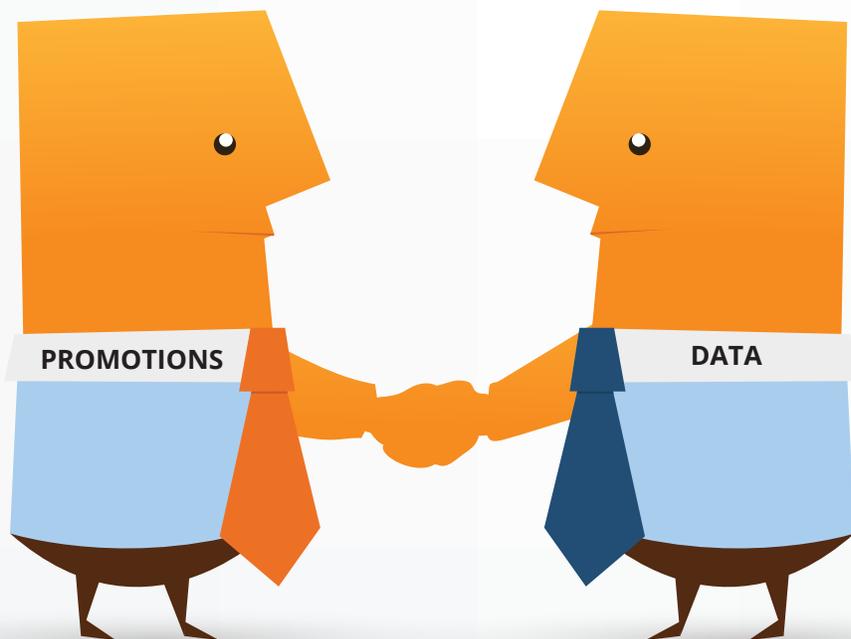
vs. Total Digital Ad Spending (in billions)





Promotions,
meet data.

Data, meet
promotions.



Now that we're all friends,
let's prove digital's impact on retail sales.

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