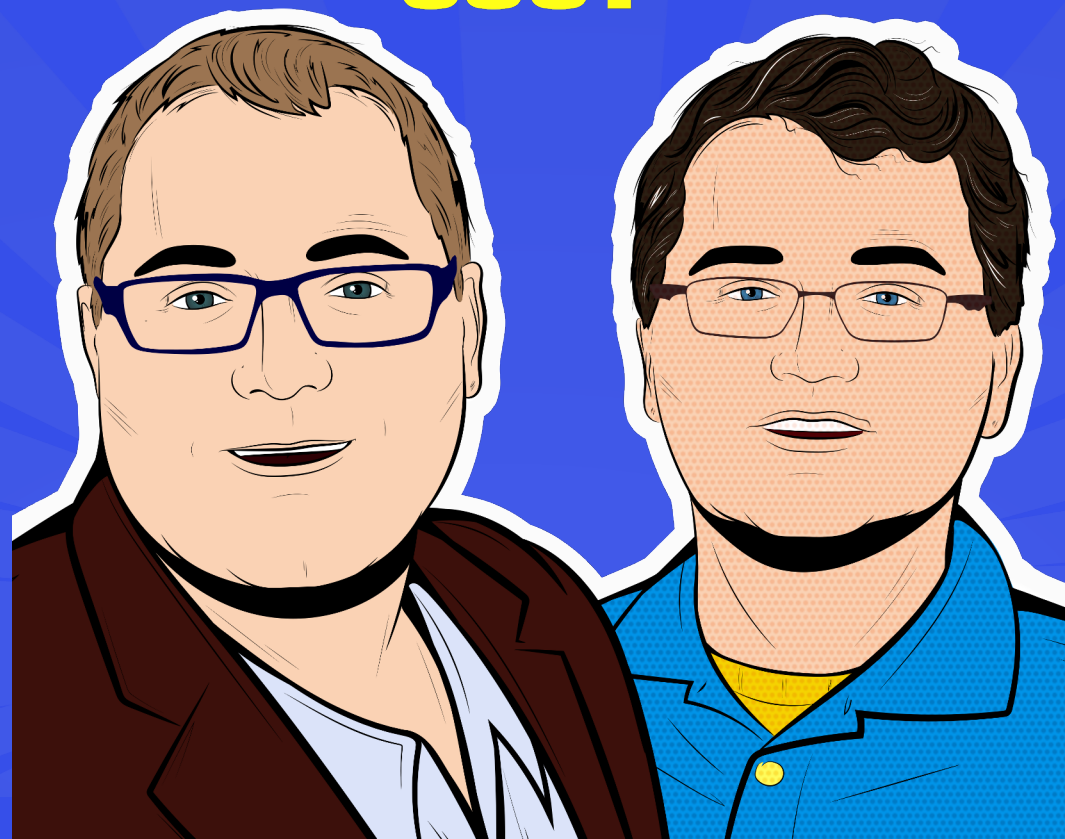


2021 Commerce Recap

THE **JASON** & **SCOT** SHOW



Jason “Retailgeek” Goldberg

Chief Commerce Strategy
Officer, Publicis Groupe

[@retailgeek](https://twitter.com/retailgeek)

Scot Wingo

CEO of GetSpiffy and
Co-Founder of ChannelAdvisor

[@scotwingo](https://twitter.com/scotwingo)

[Jasonandscot.com](https://jasonandscot.com)



The background is a photograph of a shopping mall with a high, vaulted glass and steel ceiling. The floor is a black and white checkered tile. On the left, a large glass display case is visible. A sign hanging from the ceiling reads "The Melbourne Shop by". People are walking in the distance. The entire image is covered with a semi-transparent blue overlay.

2021 Retail

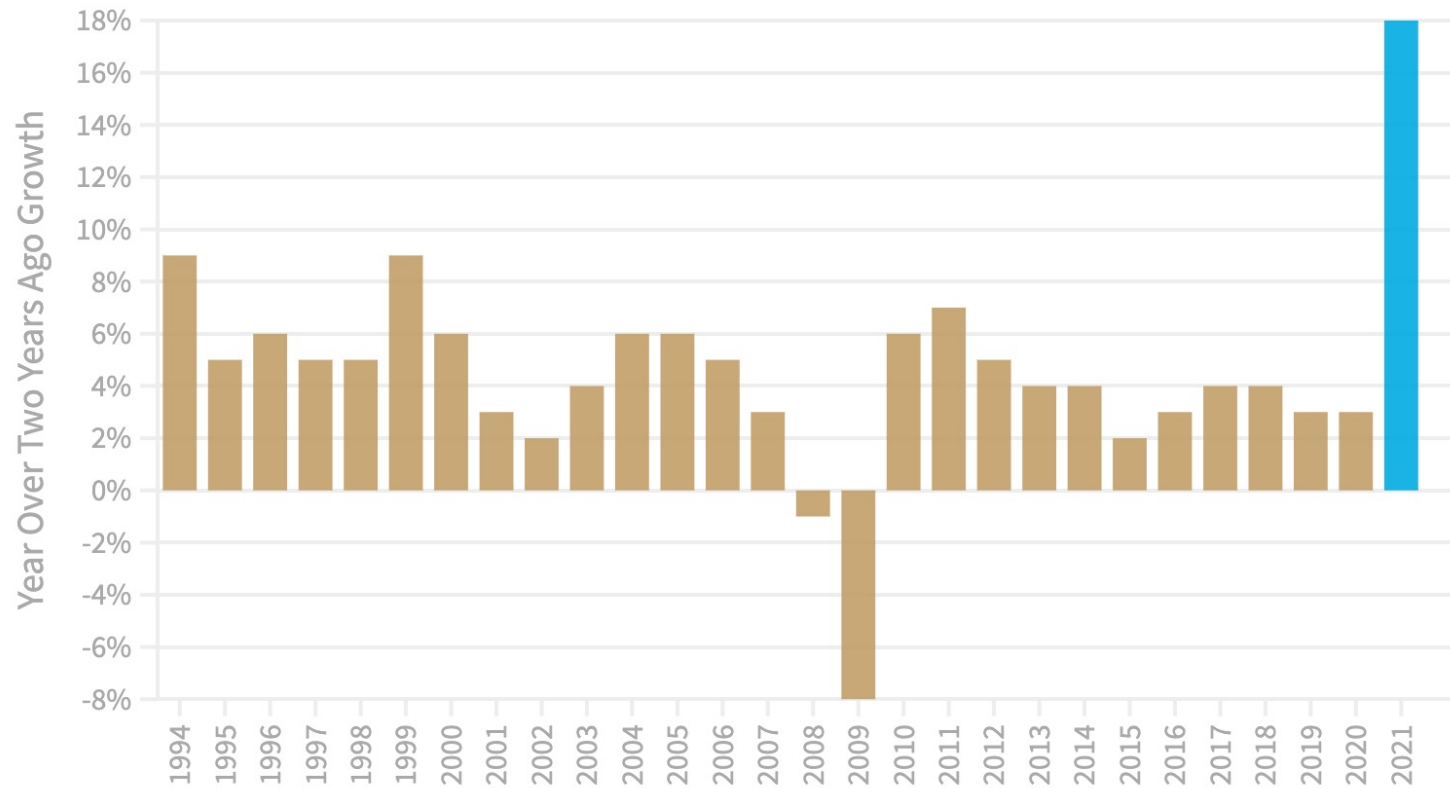
\$6.6T

+18% vs 2020

+22% vs 2019

Retail Growth

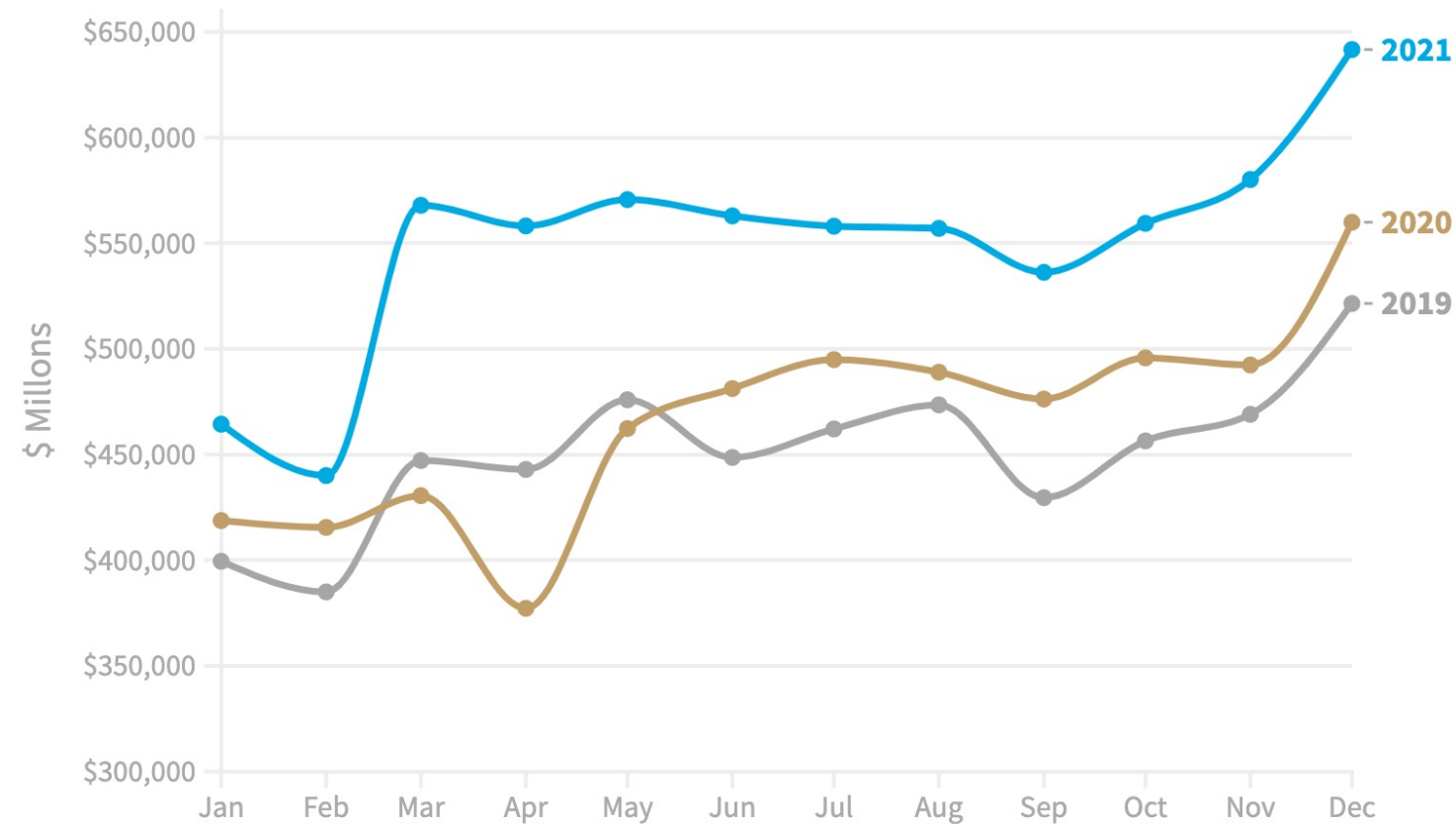
Year over Last Year



US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthly

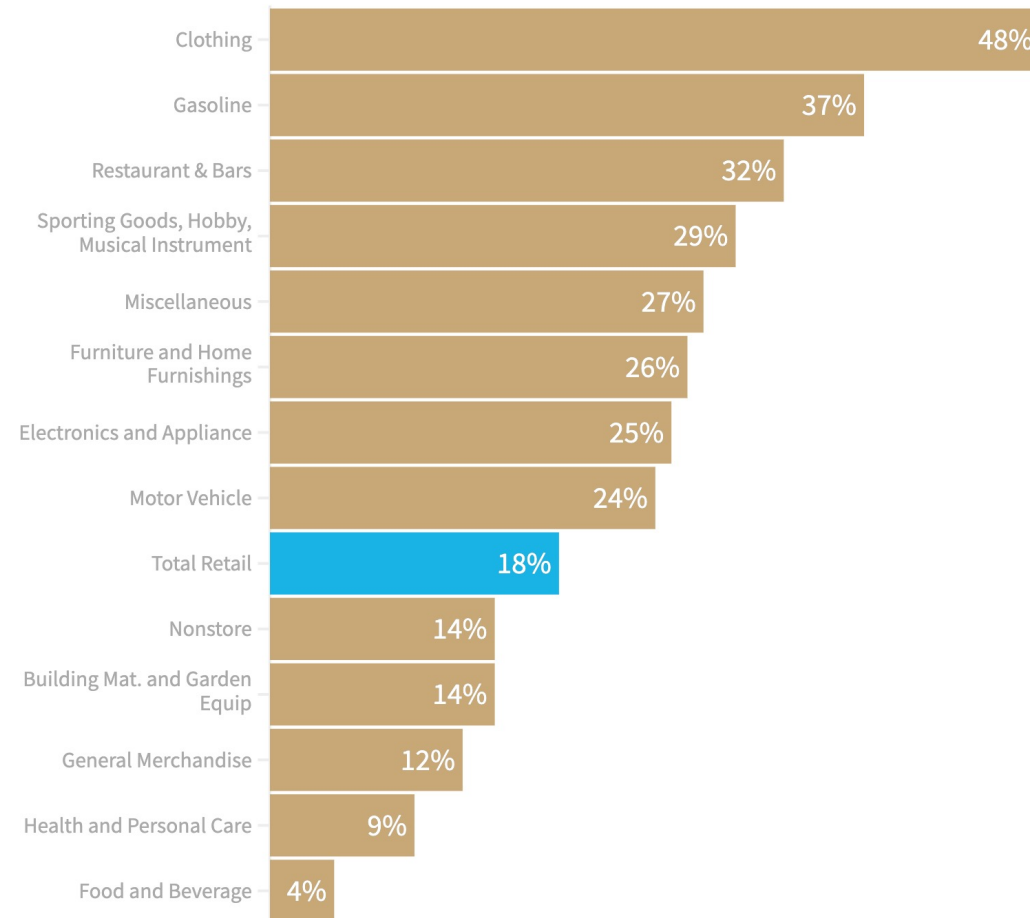


Monthly Retail Sales



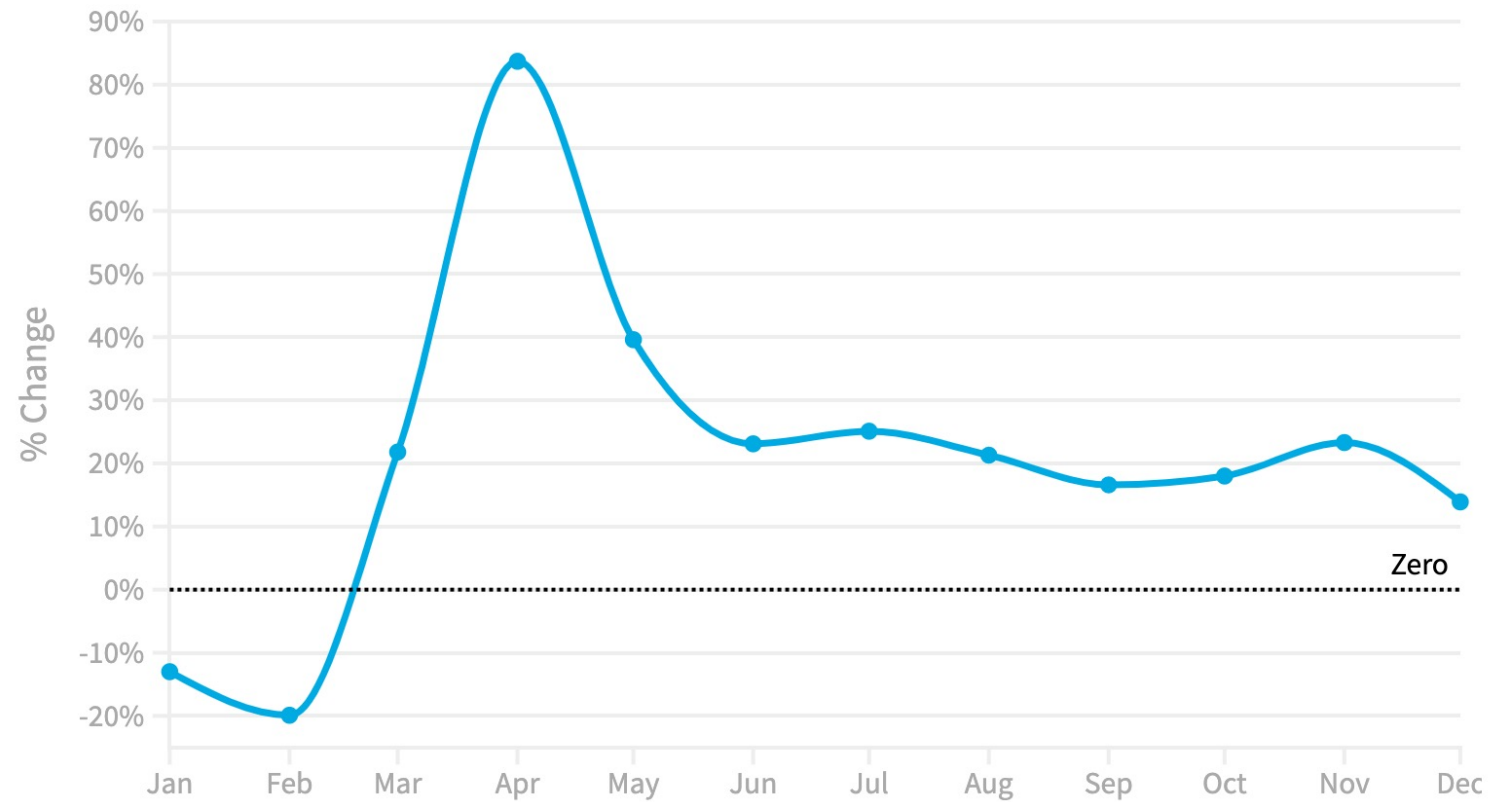
Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator
Branch
Adv Monthlv. Not Seasonally Adj. Cat 44000

Full Year Sales vs 2020



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthly, Not Seasonally Adj

2021 US Retail Foot Traffic vs. 2020



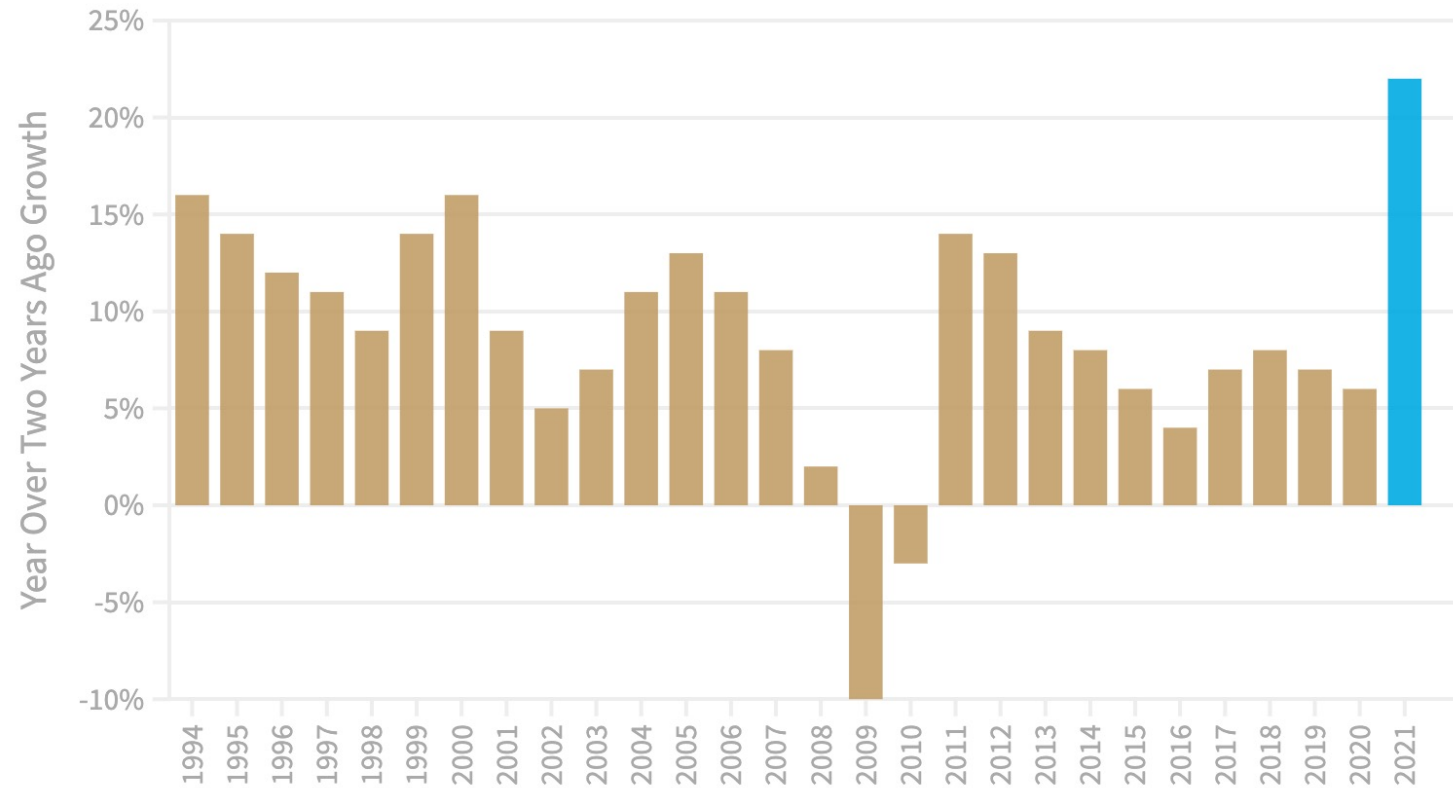
Source: Placer.AI

2021 Retail

vs. 2019

Retail Growth

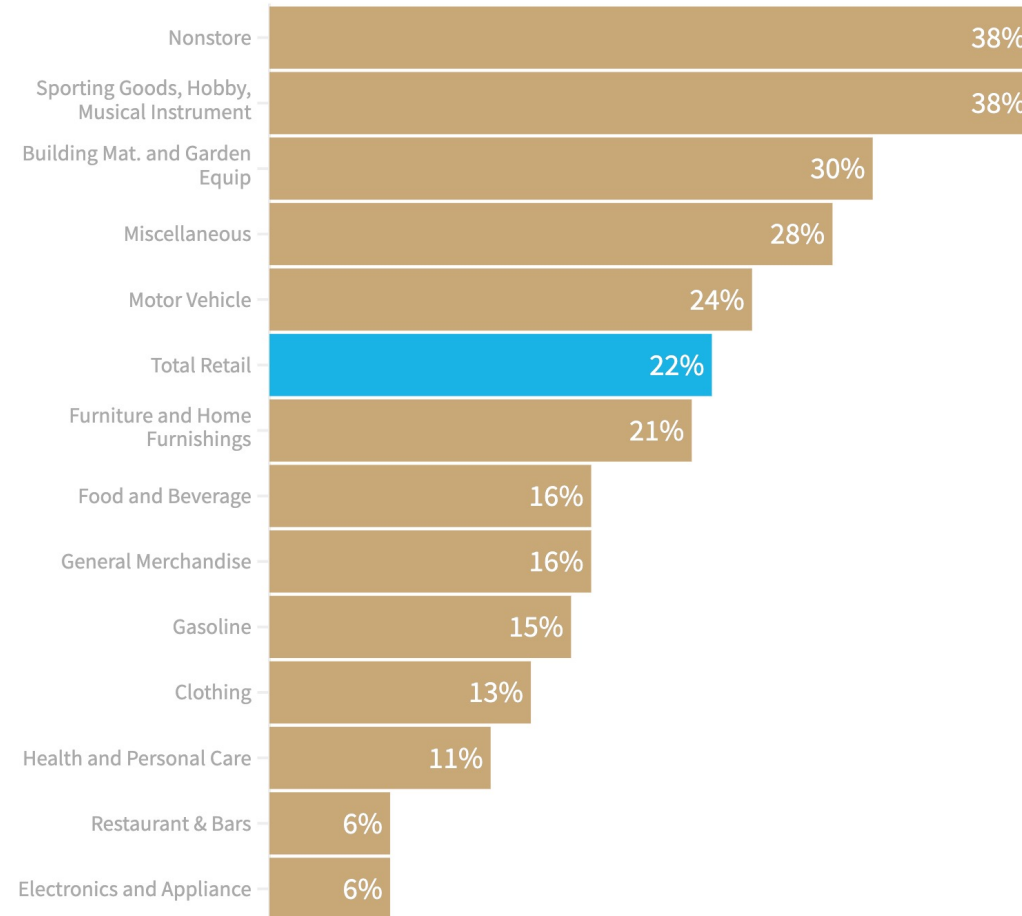
Year over Two Years Ago



US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthly

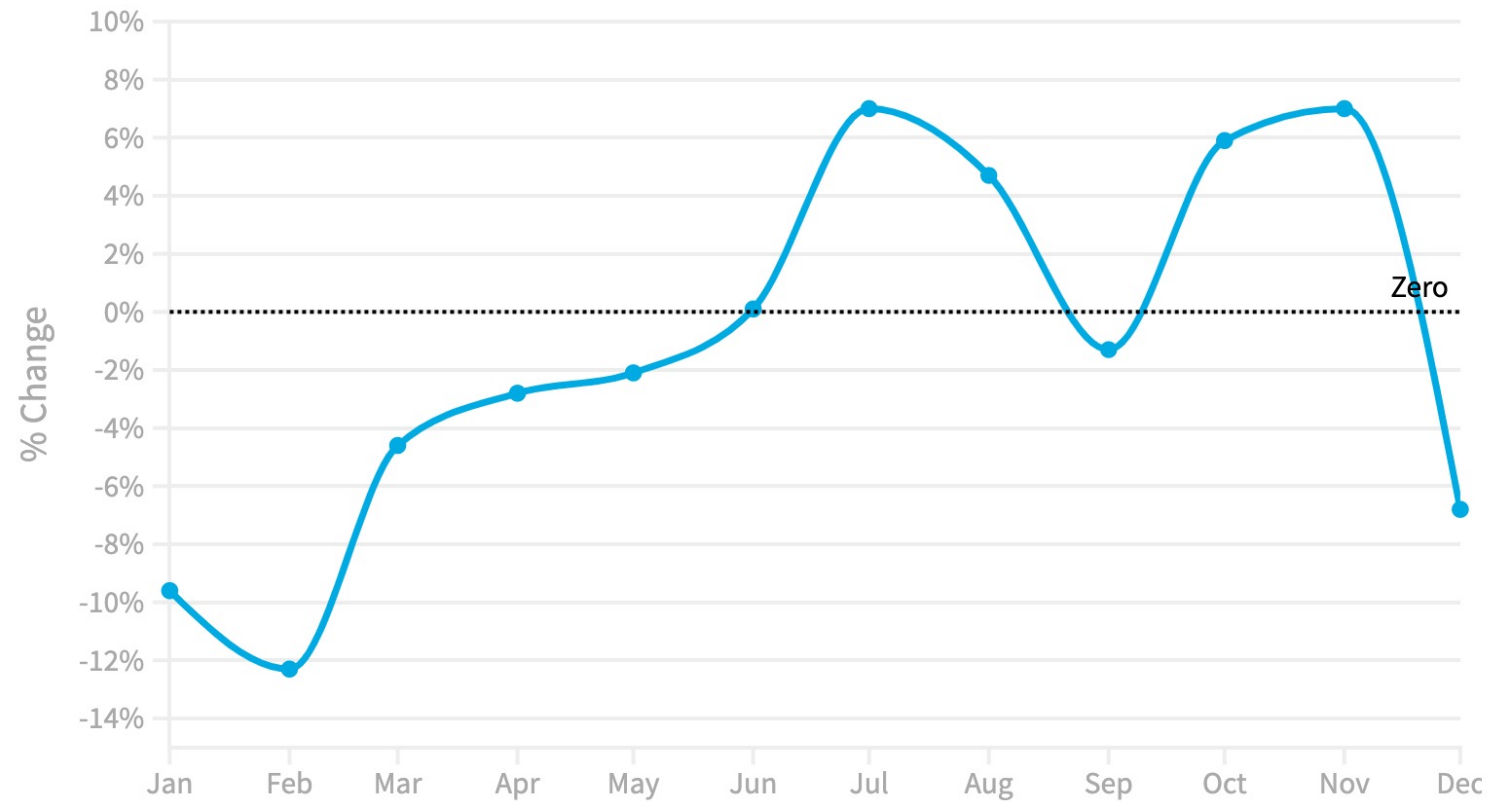


Full Year Sales vs 2019



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthly, Not Seasonally Adj

2021 US Retail Foot Traffic vs. 2019



Source: Placer.AI

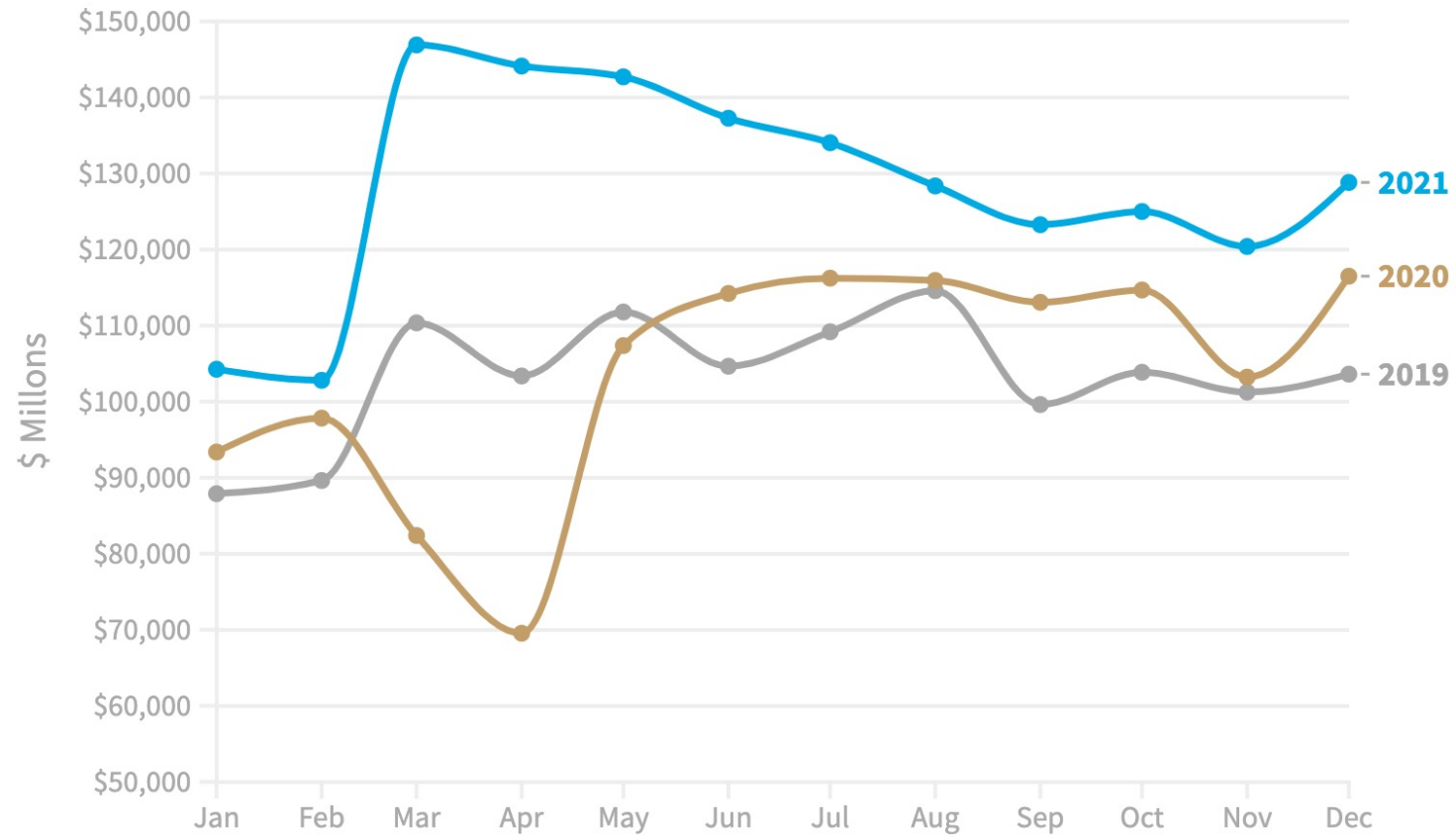


Automobile

\$1.5T

23% of US Retail
+24% vs 2019

Monthly Auto Sales



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator
Branch

Adv Monthlv. Not Seasonally Adj. Cat 445

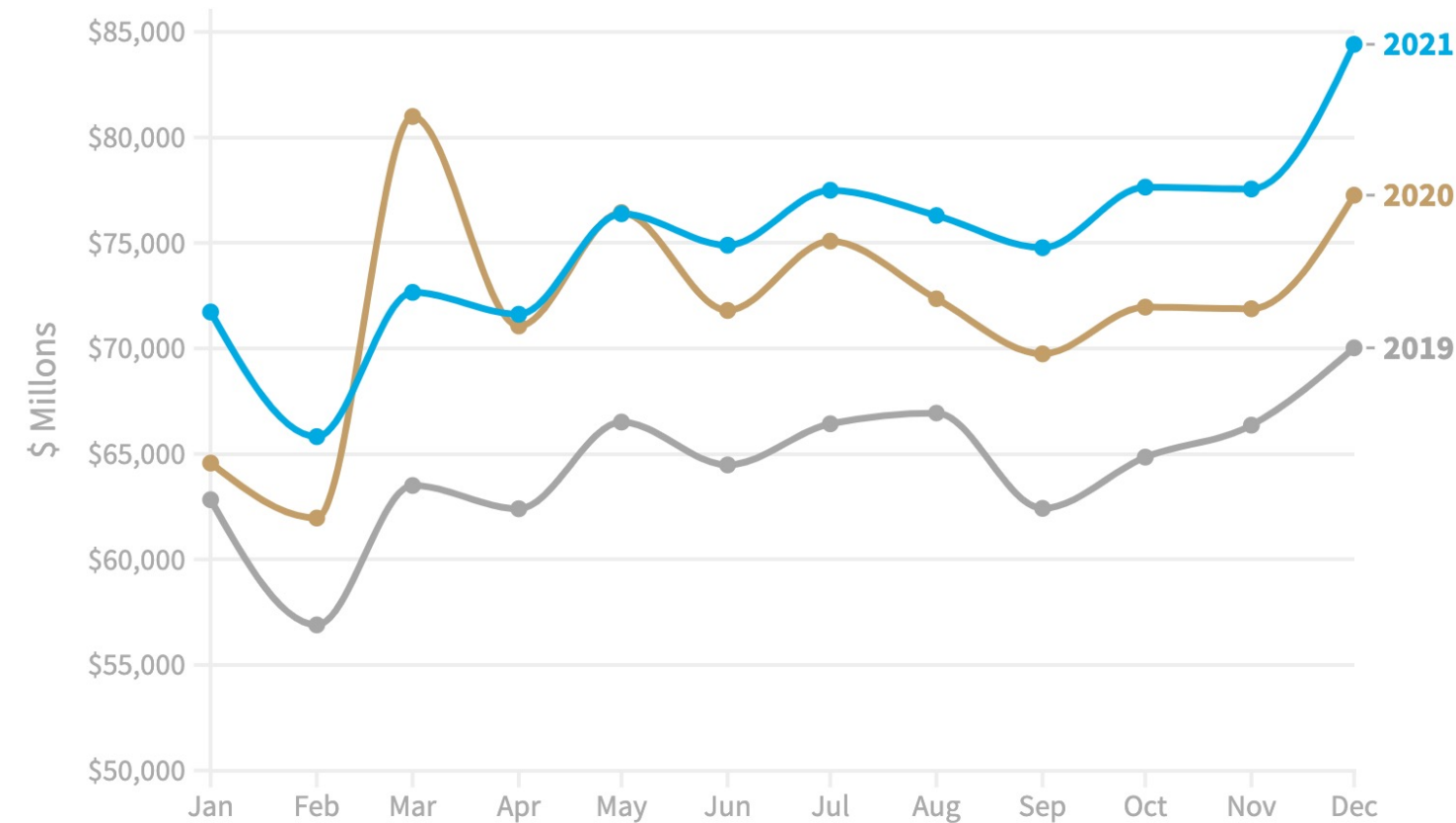


Grocery

\$901B

14% of US Retail
+16% vs 2019

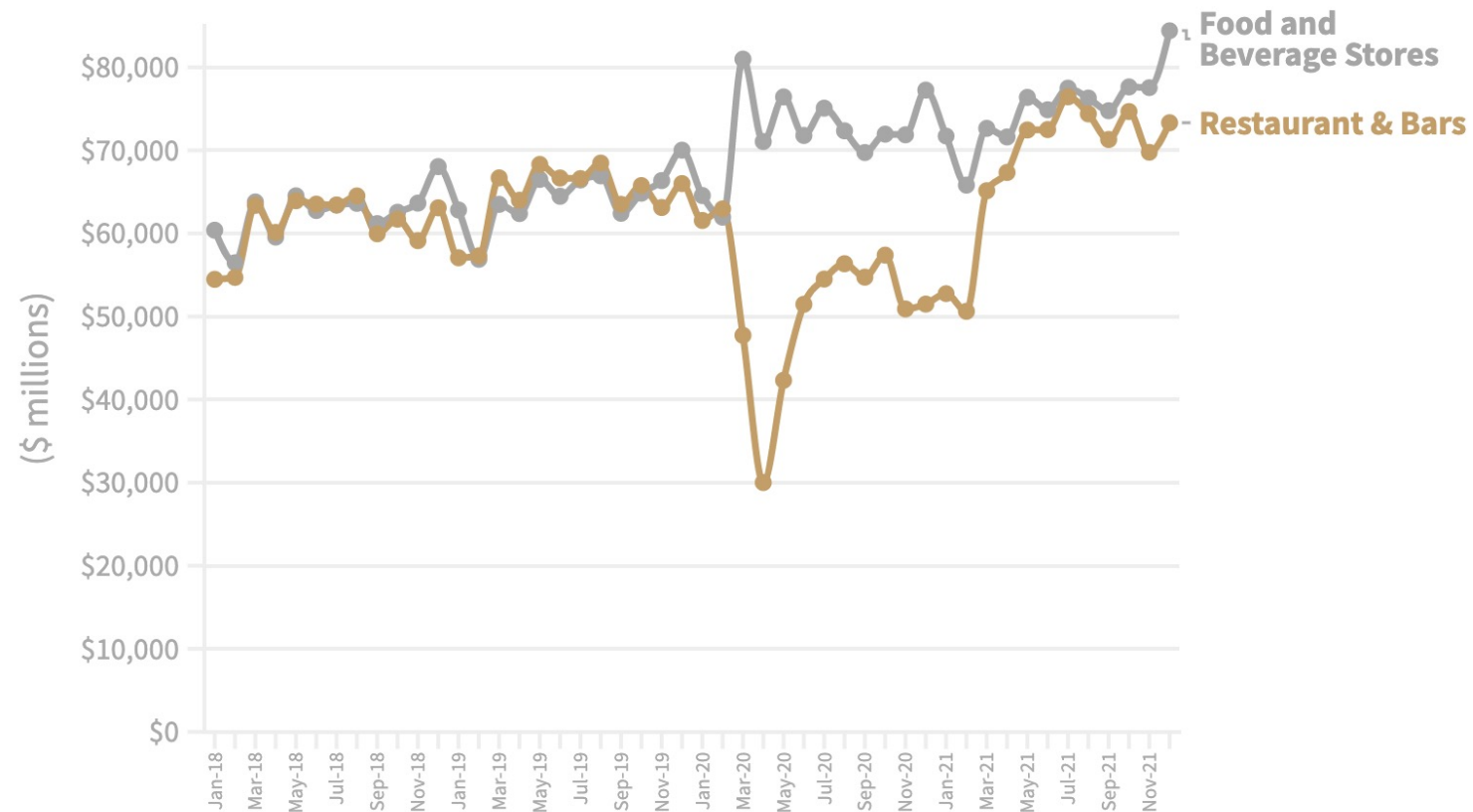
Monthly Grocery Sales



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthlv. Not Seasonally Adj. Cat 445



Restaurant vs. Grocery



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthly Data, Not Seasonally Adj, Categories 722 vs 445

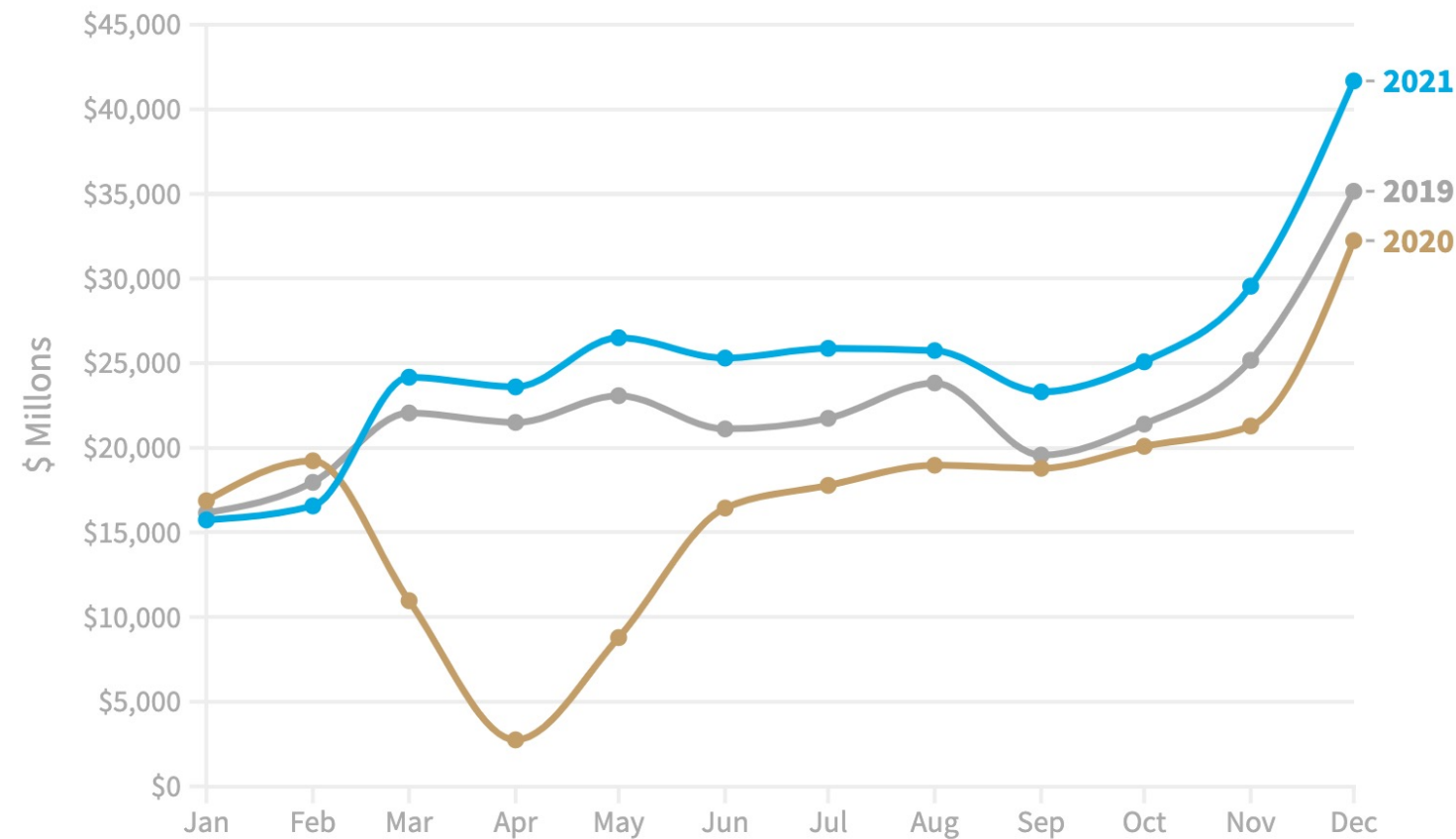


Apparel

\$303B

**5% of US Retail
+13% vs 2019**

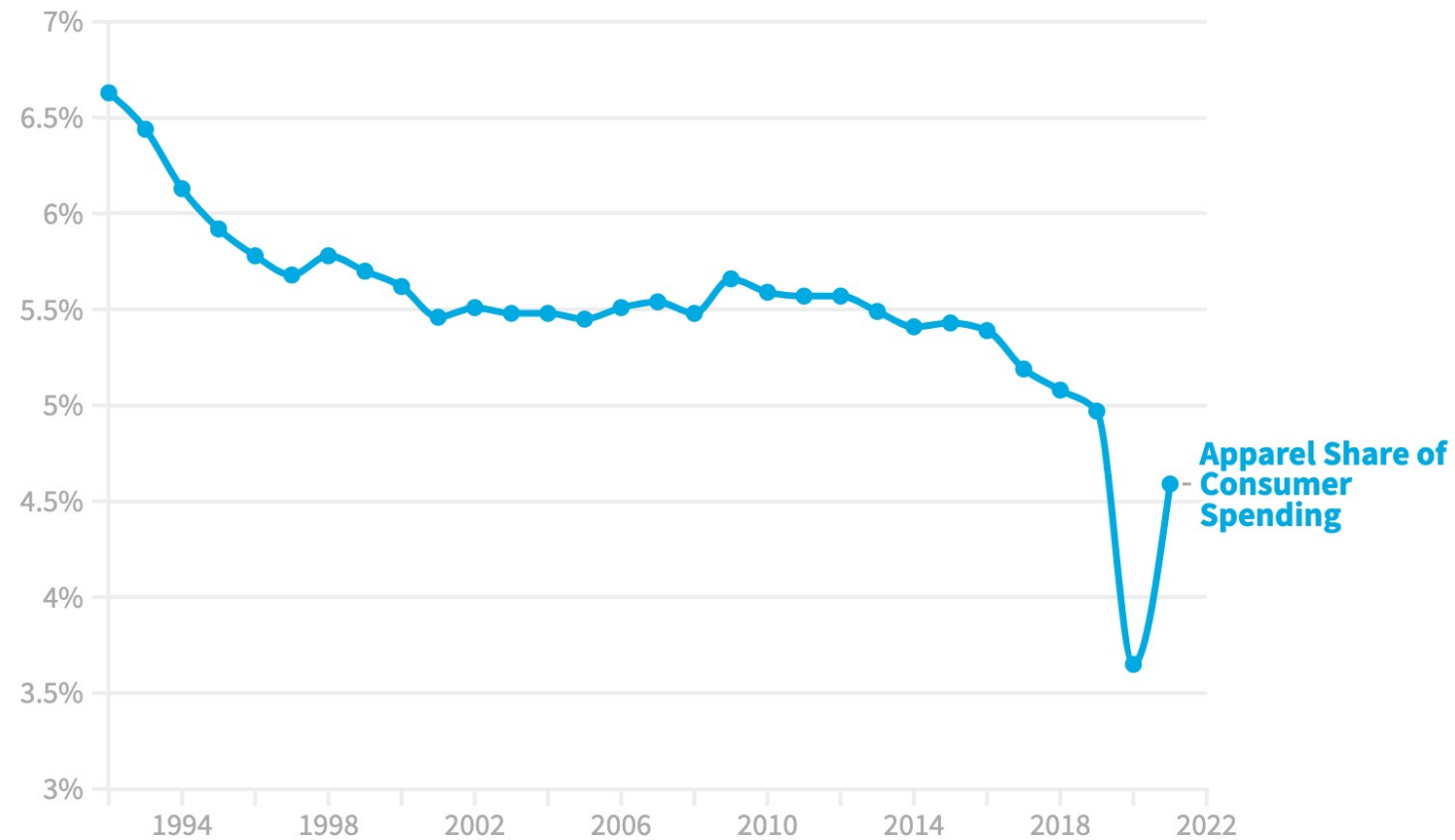
Monthly US Apparel Sales



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch

Adv Monthlv. Not Seasonally Adj. Cat: 448

Apparel share of consumer spending



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch

Cat 448/44000. Adv Monthlv. Not seasonally adi

E-Commerce

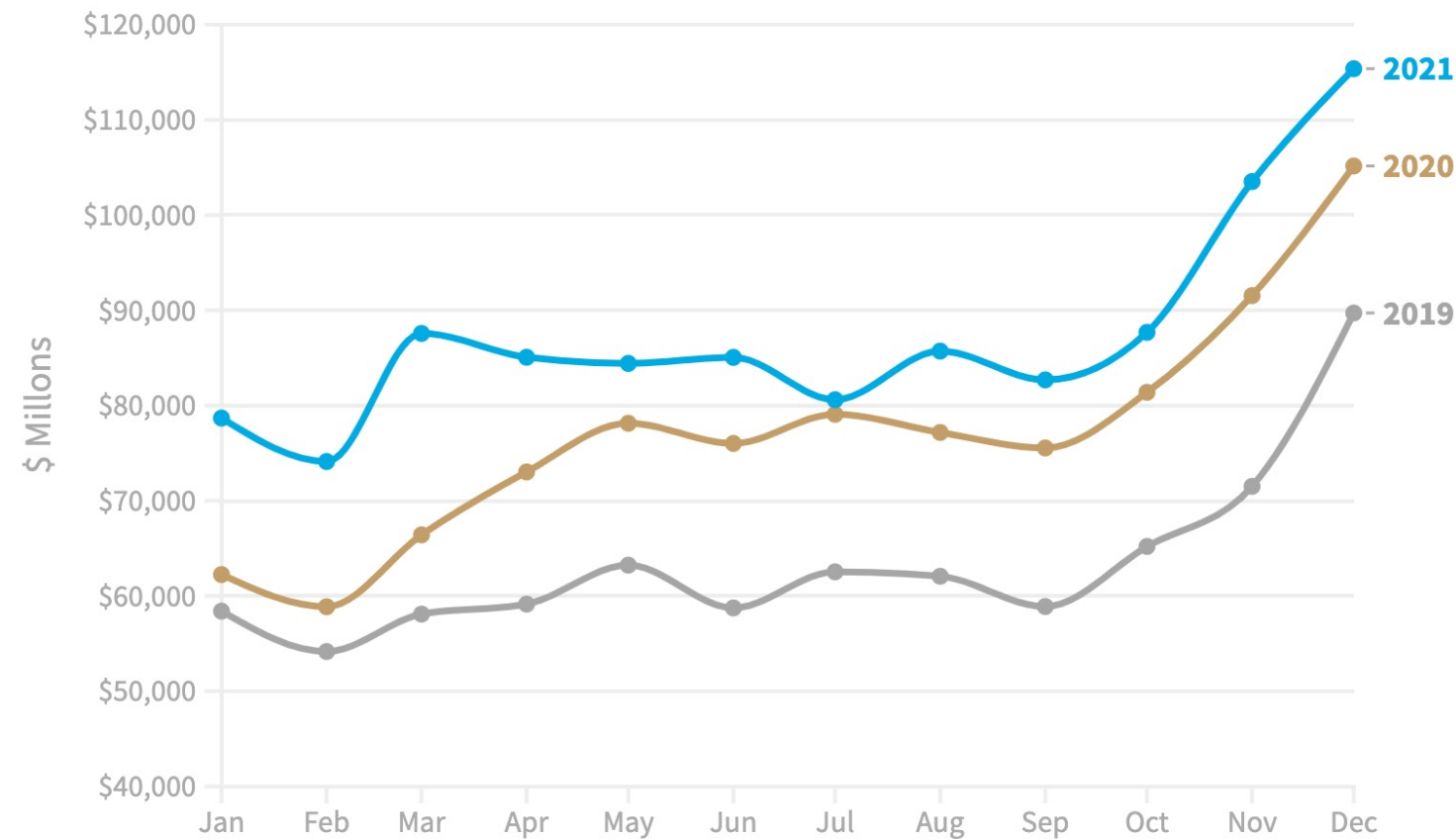
\$TBD*

~\$1 T

**16% of US Retail
+38% vs 2019**

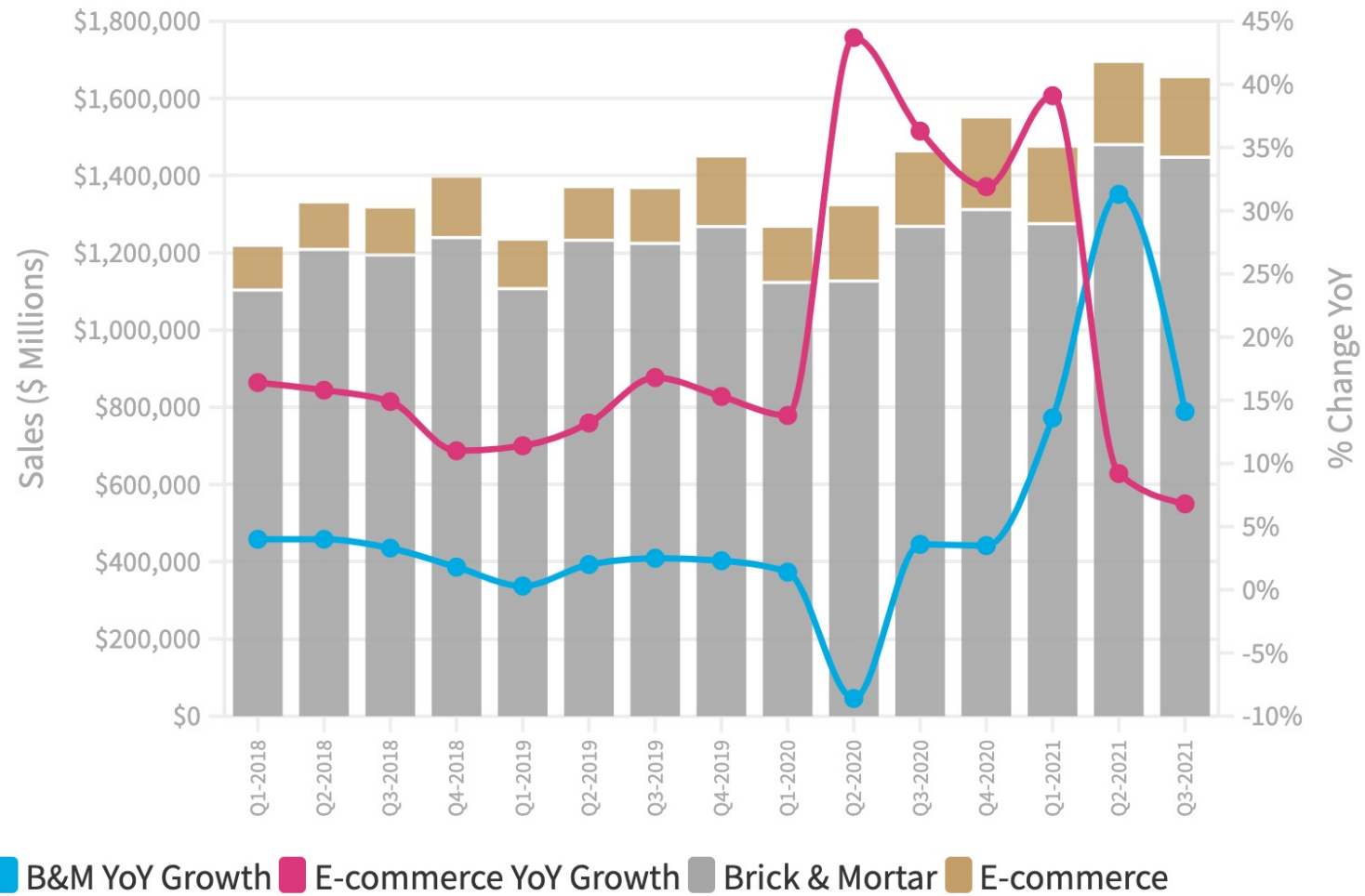
*** Quarterly e-com data for Q4 scheduled to be published Feb 20, 2022**

Non-Store Sales (E-Com & Catalog)



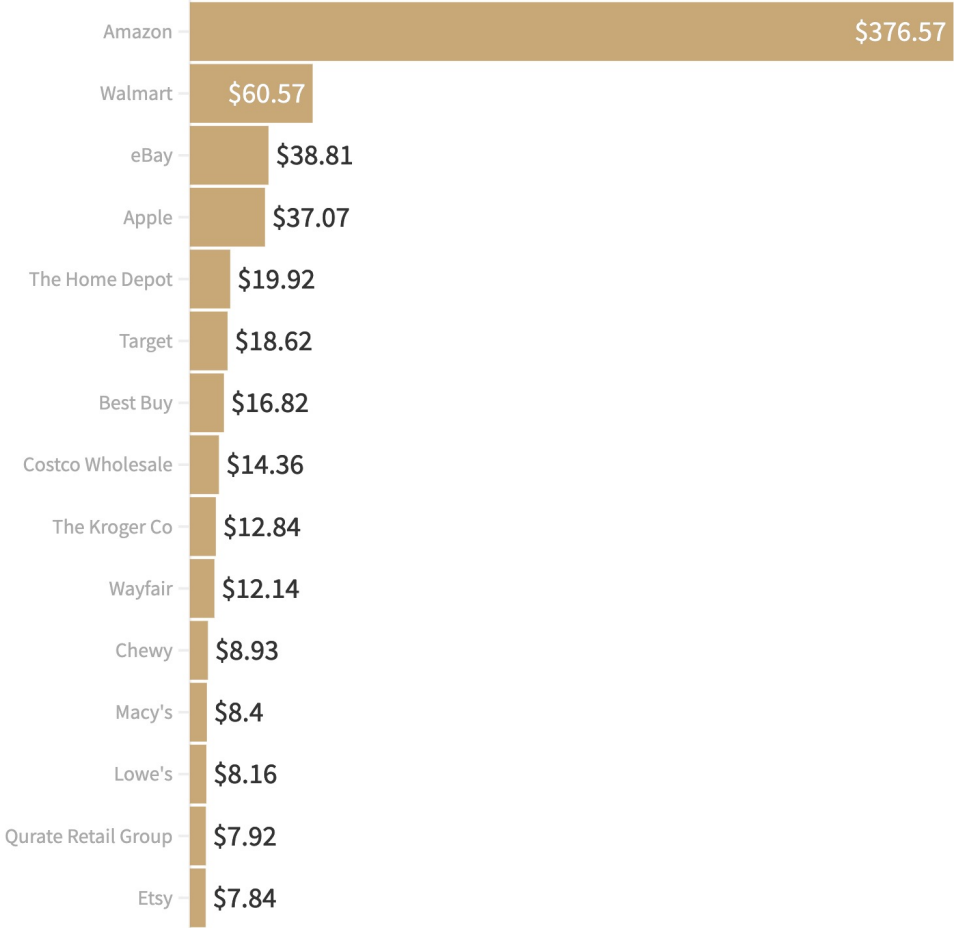
Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Adv Monthlv. NOT seasonally adi. Cat 454





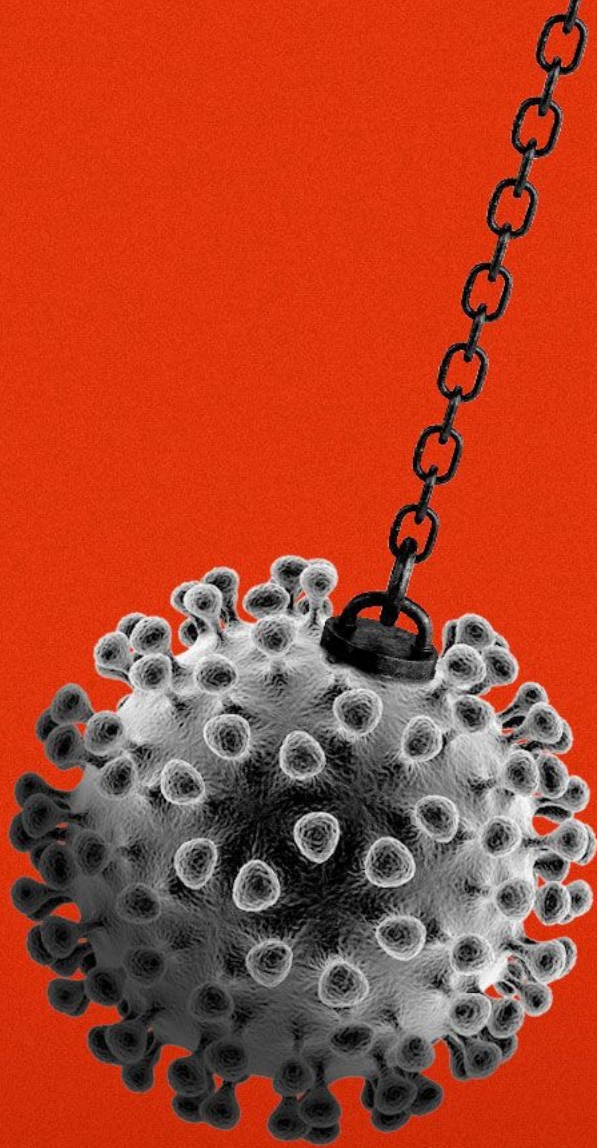
Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch
Estimated Quarterly U.S. Retail Sales (Not Adjusted): Brick & Mortar and E-

Top 15 US E-Commerce Sites 2021

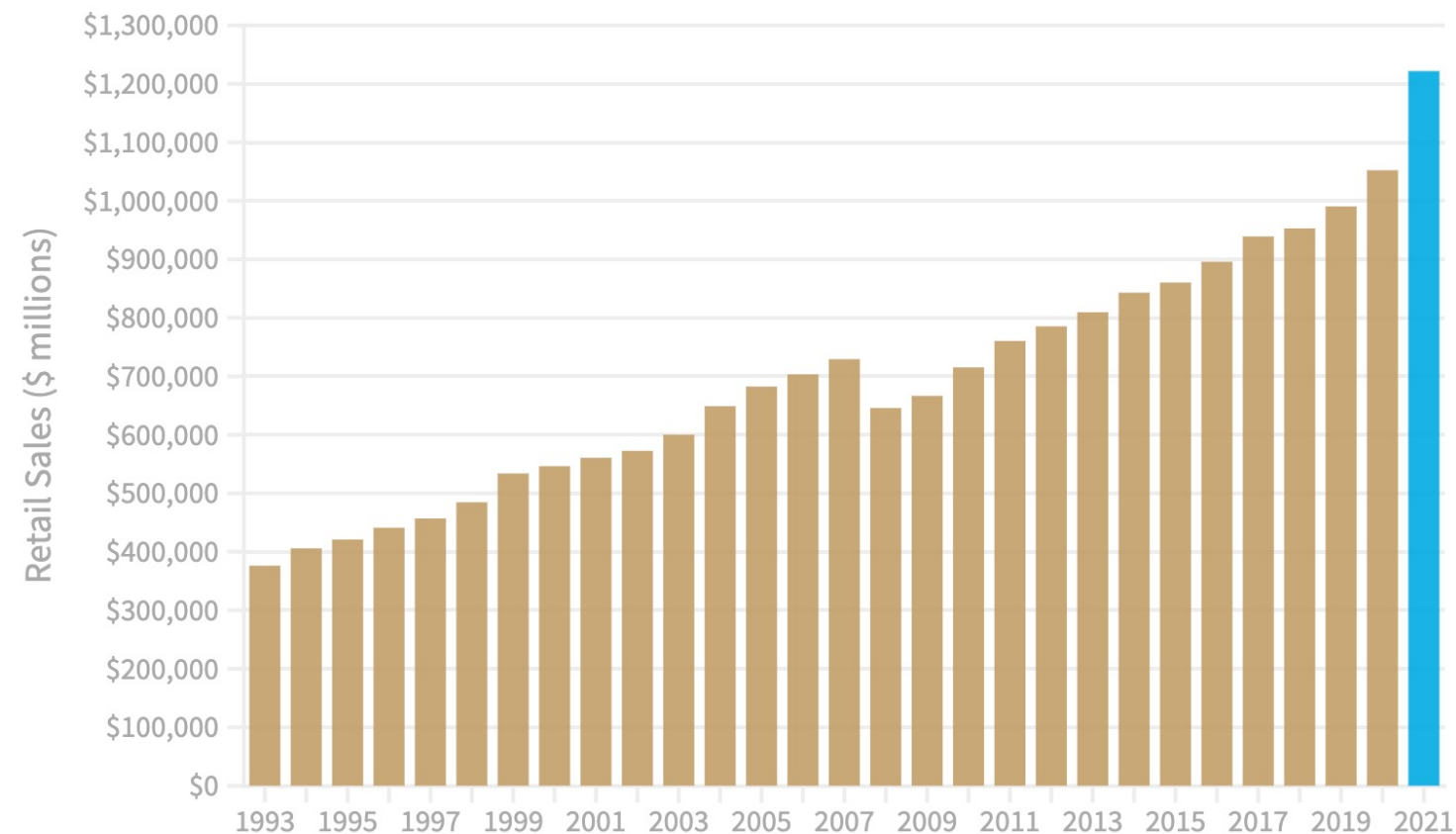


Source: eMarketer Estimate

Holiday 2021



Holiday (Nov+Dec) Sales Annual Revenue Growth



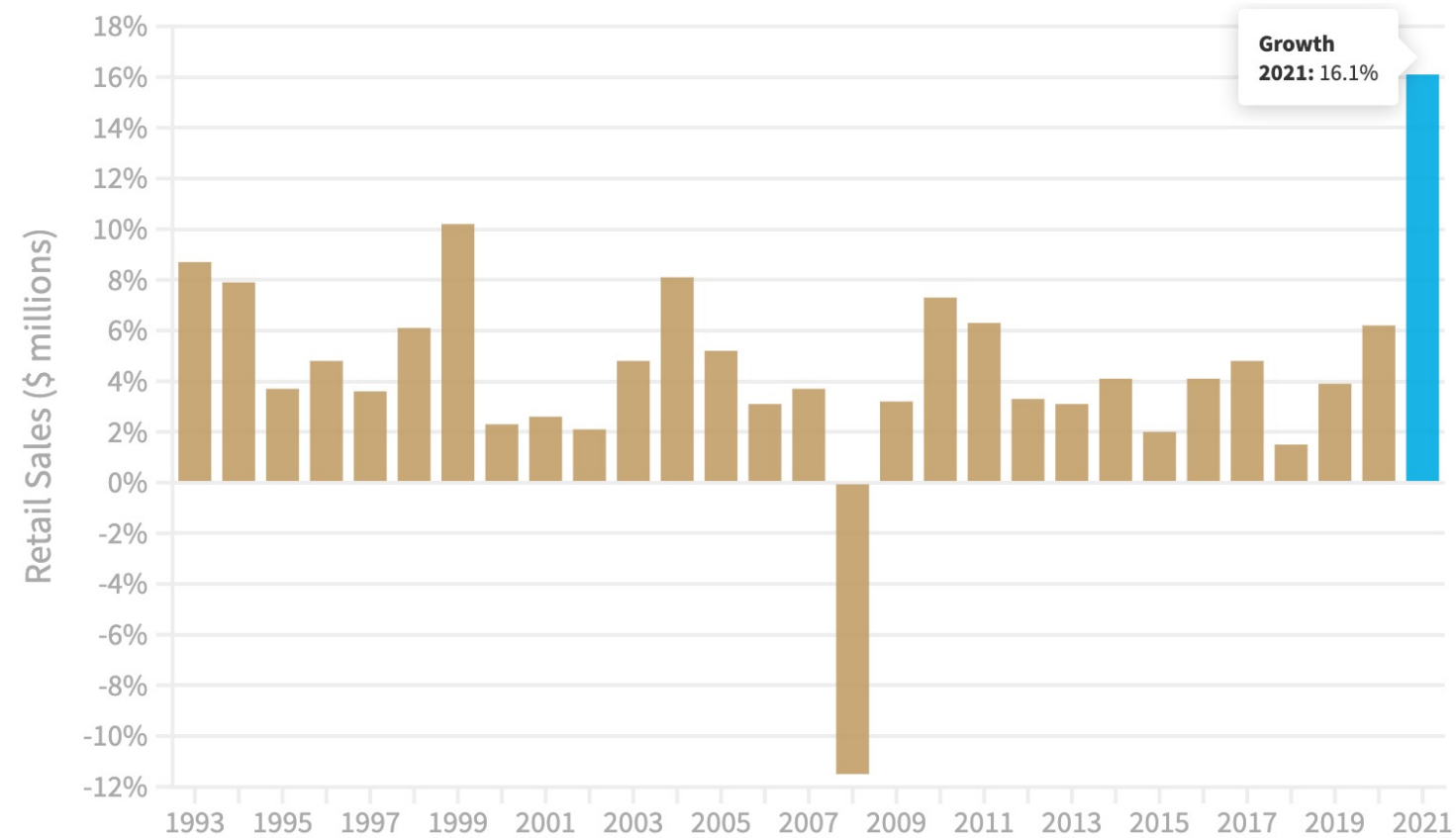
Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator

Branch

Adv Monthlv. NOT seasonally adi. Cat 44000



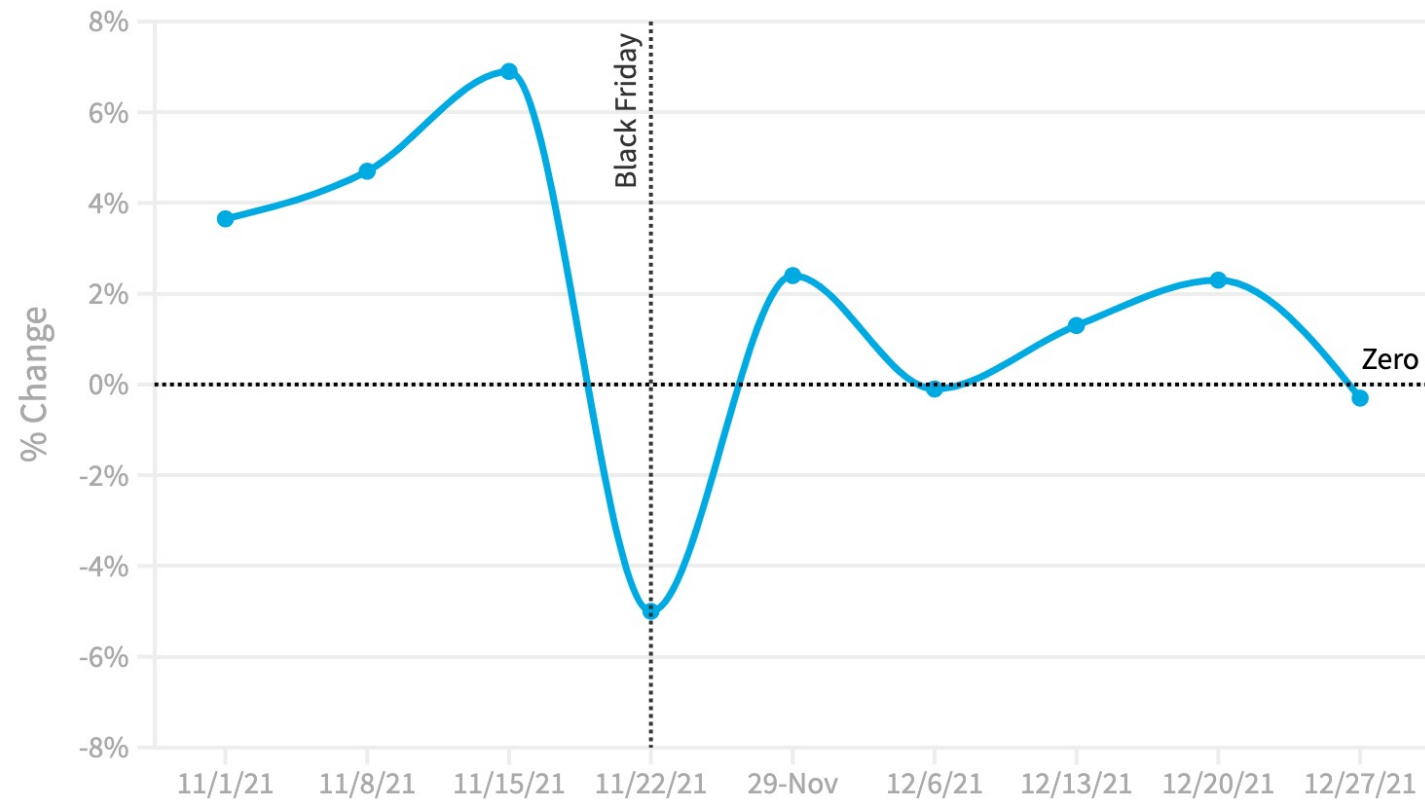
Holiday (Nov+Dec) Sales Annual Growth



Source: US Dept of Commerce, Economic Indicators Division, Retail Indicator
Branch
Adv Monthlv. NOT seasonally adi. Cat 44000



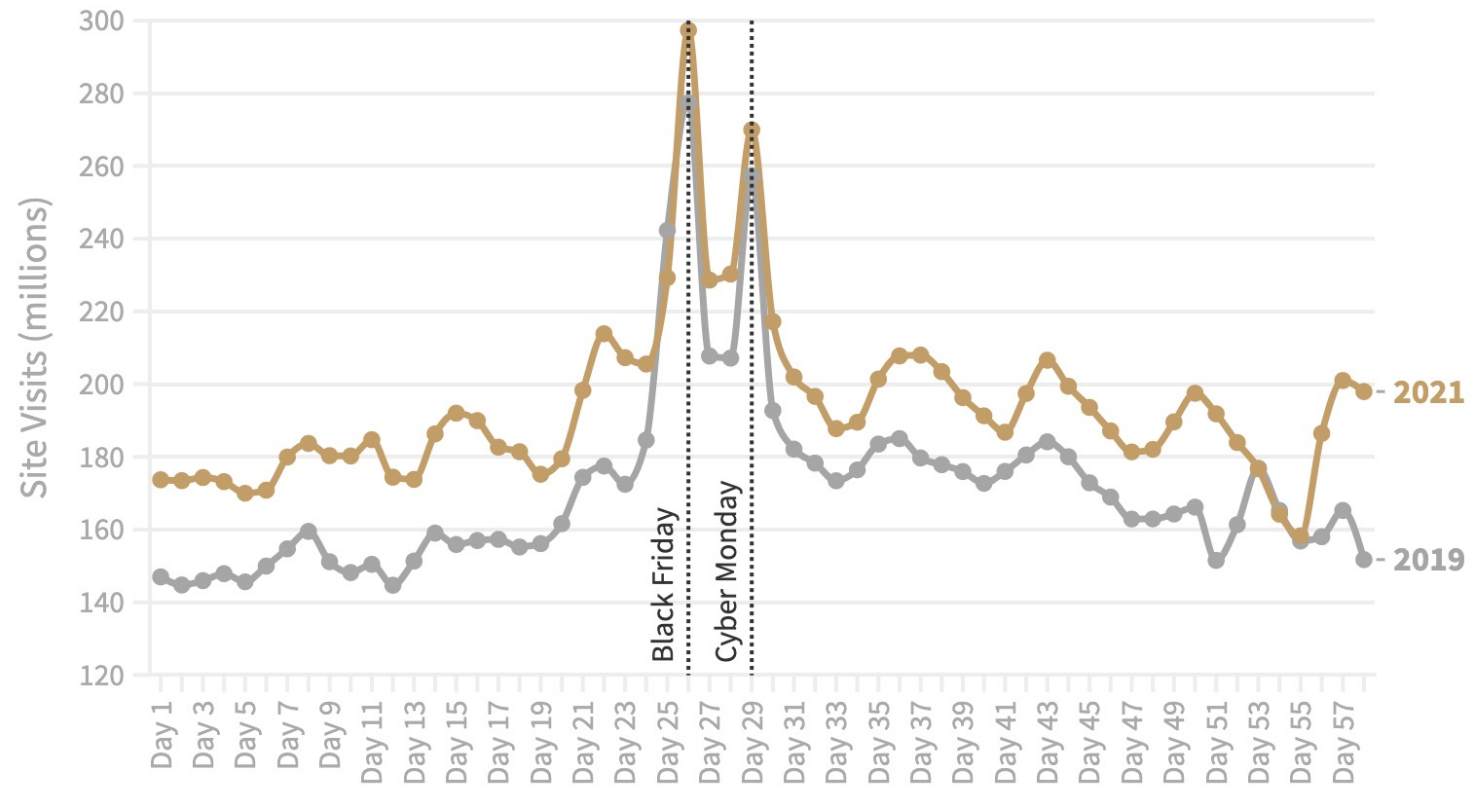
2021 US Retail Holiday Foot Traffic vs. 2019



Source: Placer.AI

US Holiday E-Commerce Site Visits

Top 100 E-Commerce Sites

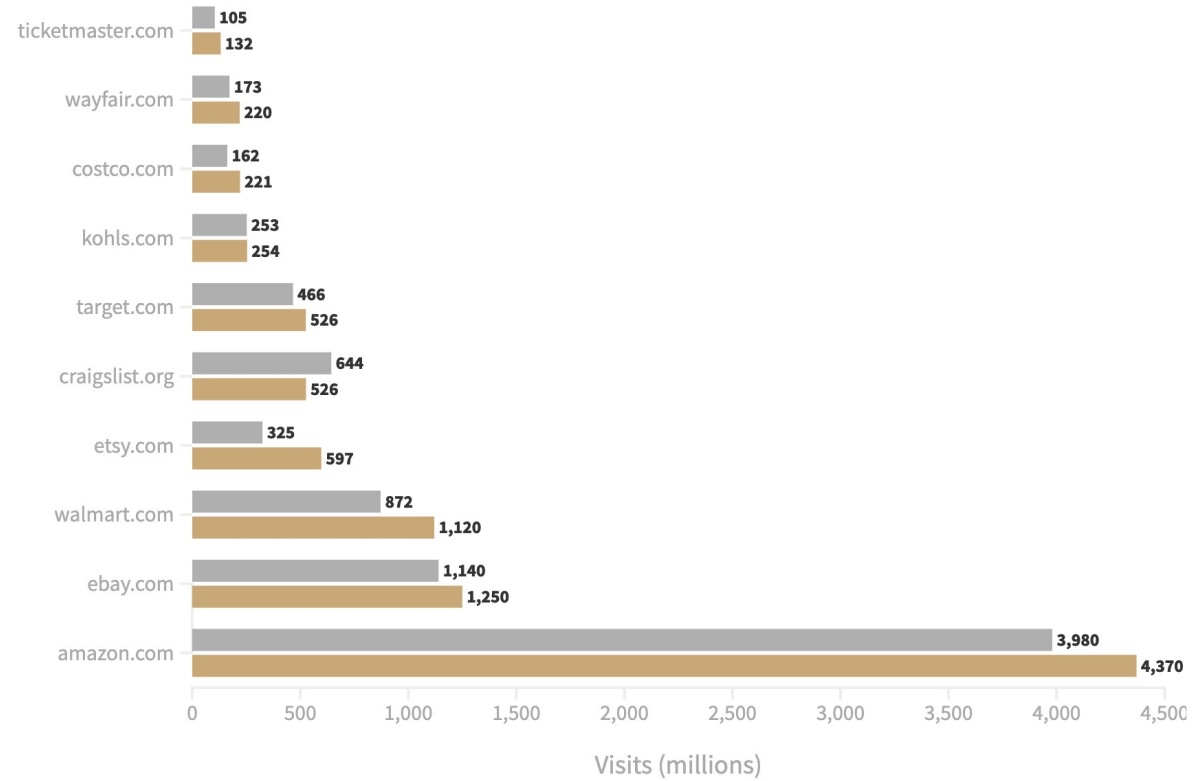


Source: SimilarWeb • Top 100 eCommerce Sites

US Only, Desktop and Mobile Web, 25 days before Black Friday, 32 days after

US Holiday E-Commerce Site Visits 2019 vs 2021

■ 2019 ■ 2021



Source: SimilarWeb • Top 10 eCommerce Sites
US Only, Desktop and Mobile Web, Nov-Dec Total Visits

Holiday E-Com Estimates

Adobe:

- US Holiday E-Commerce Spend \$204B
- Up 8.6% over last holiday season (44% vs 2019)

Mastercard:

- US Holiday Retail increased 8.5% vs 2020 (10.7% vs 2019)
- US Holiday E-Commerce up 11% vs 2020 (61.4% vs 2019)

Salesforce

- US Holiday E-Commerce Spend \$257B
- Up 9% over last holiday season

Inflation (Dec 2021)

7%

2.3% Dec 2019

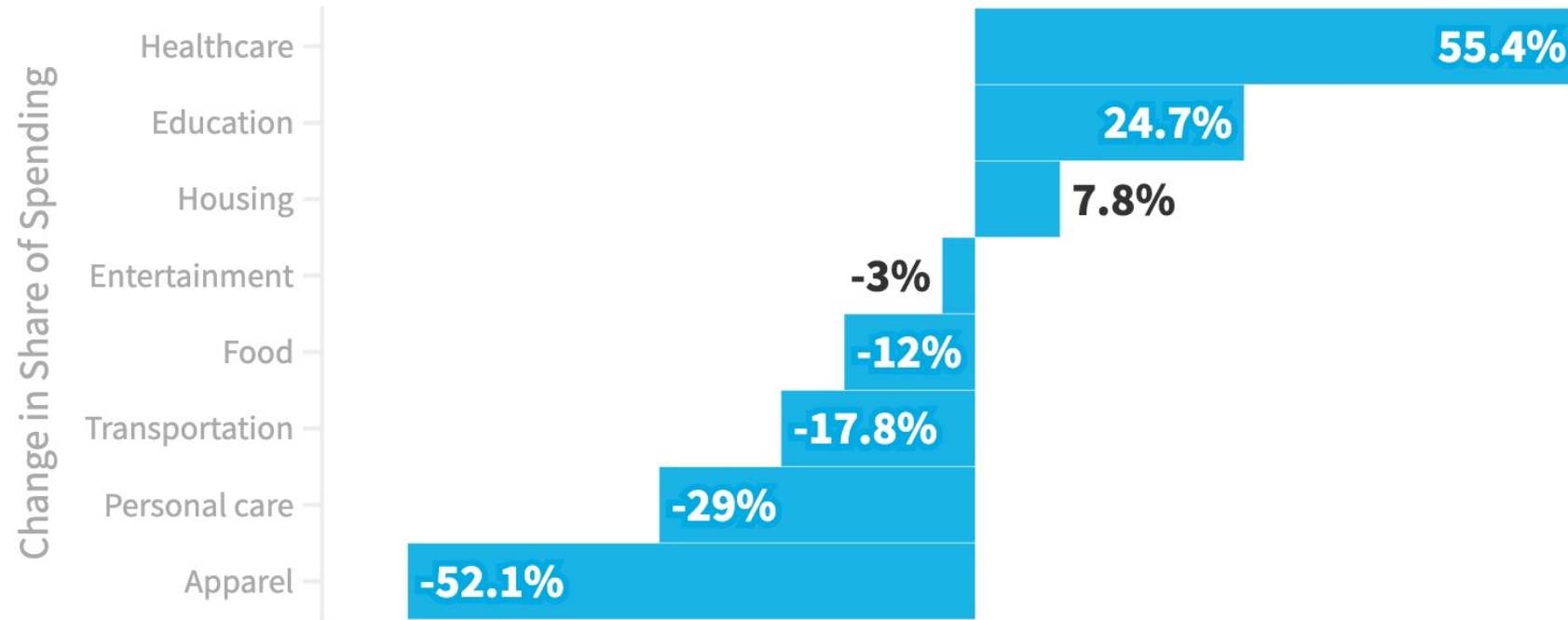
US Inflation



Source: Bureau of Labor Statistics

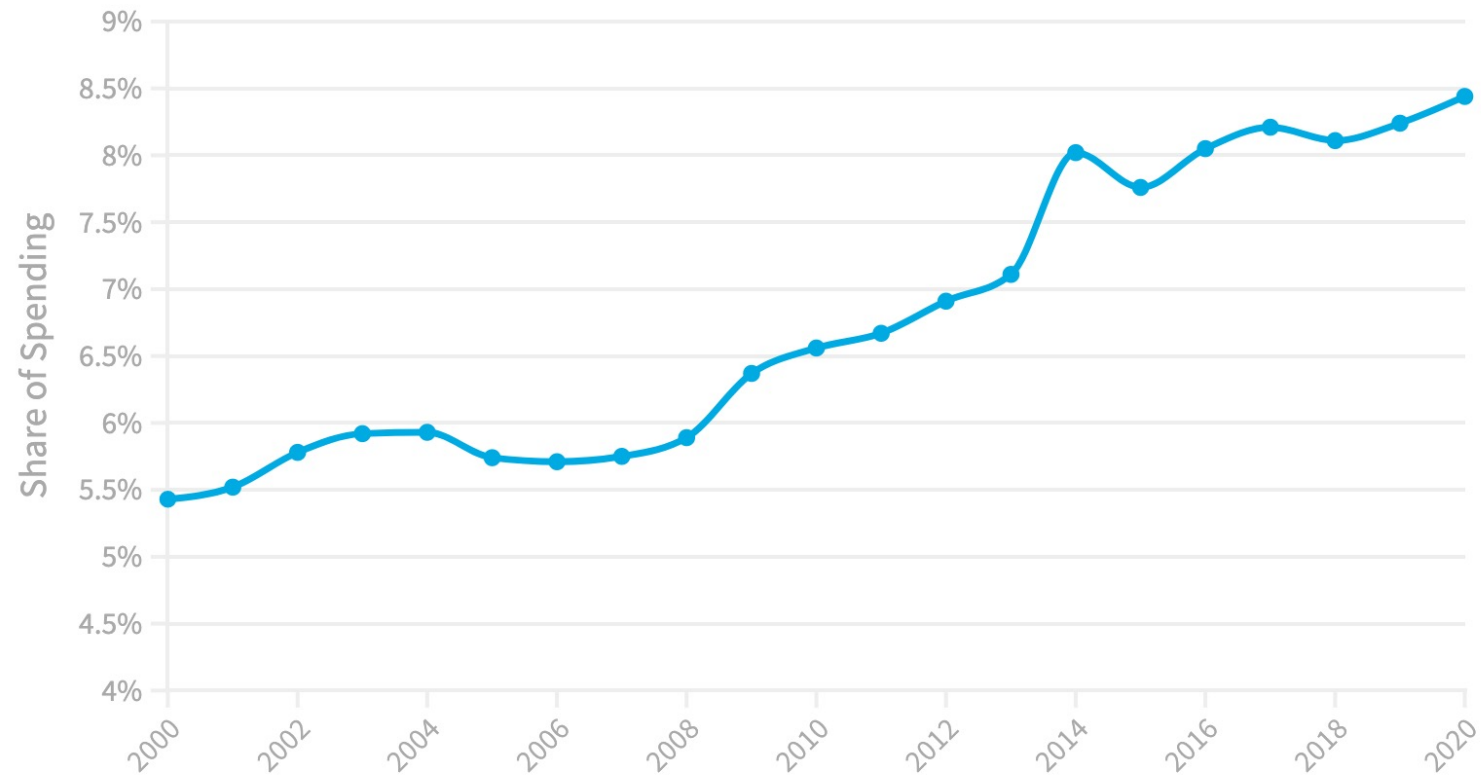
Consumer Spending

2000 to 2020



Source: U.S. BUREAU OF LABOR STATISTICS
Consumer Expenditure Surveys

Healthcare Share of Spending 2000 to 2020



Source: U.S. BUREAU OF LABOR STATISTICS
Consumer Expenditure Surveys

Data Sources

US Retail & E-Com Sales Data: [US Dept of Commerce](#)

E-Commerce Estimates: [eMarketer](#)

Retail Foot Traffic Data: [Placer.ai](#)

Web Traffic Data: [Similar Web](#)

Holiday Estimates: [Adobe](#), [Salesforce](#), [Mastercard](#)

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Happy
Commercing!