

By the editors of **Internet Retailer**

THE CYBER 5 2018 REPORT

Benchmarks, results and analysis of the Thanksgiving to Cyber Monday sales period in U.S. e-commerce.



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INTRODUCTION

For online retailers, nothing says ‘tis the season’ like the five-day period spanning Thanksgiving Day to the following Monday, otherwise known as Cyber Monday. Merchants spend months preparing for it—bulking up inventory levels, devising promotions, load-testing sites and more—while online shoppers scout deals and check gift-buying tasks off their lists from wherever they happen to be.

The just-past Cyber 5 period brought with it an expected surge in online sales, with Thanksgiving leading in year-over-year growth at 28%, per Adobe Inc., which bases its analysis on transaction data collected from 80 of the top 100 U.S. online retailers.

But online sales have been growing strongly throughout the early part of the holiday season,

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not just during the Cyber 5 weekend that is the focus of this report. From Nov. 1-26 (Cyber Monday), online sales totaled \$58.52 billion, a 16.8% increase from \$50.1 billion spent during the same period in 2017. 60% of consumers anticipate completing at least 50% of their holiday shopping online this season, according to an Internet Retailer/Bizrate Insights consumer survey fielded in November among more than 1,000 consumers.

It was not so long ago that we cheered U.S. online retail’s first \$1 billion day, on Cyber Monday 2010. This year, the new benchmark for a banner day for daily online sales is \$2 billion—a mark retailers achieved seven times in the first 26 days of November, including nearly \$8 billion on Cyber Monday alone.

This summary report leads with the sales results and new benchmarks for the Cyber 5 period in U.S. e-commerce. It includes commentary from more than a dozen online retailers about how their businesses performed and the challenges they encountered, and analysis from Internet Retailer editors and researchers. It also highlights some of the holiday strategies retailers and brands are deploying this season. We hope this report will be valuable to you, our readers, as you map out your strategy for the remainder of the 2018 holiday season and make your plans for holiday 2019.

The Editors

THE CYBER 5

U.S. shoppers will spend \$122.00 billion with online retailers during November and December, according to Internet Retailer's research team projection, and the five-day period spanning Thanksgiving to the Monday following (aka Cyber Monday) delivered a concentrated dose of those sales to online retailers. Internet Retailer estimates that U.S. shoppers spent \$22.55 billion online during the Cyber 5 period, up 19.3% from \$18.90 billion in 2017.

Ahead of the holiday weekend, 91% of shoppers said they planned to shop online over the five-day period, which is more than shoppers who planned to shop in stores at 89%, according to a Deloitte LLP consumer survey. The same survey found that on Black Friday, the day after Thanksgiving, 50% of respondents said they plan to shop online—a day that has historically been known for crowded stores.

About 9 million fewer consumers (165 million vs. 174 million) actually shopped at all during the five-day period than did so during the period in 2017, according to the National Retail Federation trade group, and retail foot traffic in stores fell 1.7% on Black Friday, according to retail data firm ShopperTrak. Meanwhile, consumers bought more online. Rakuten Intelligence finds shoppers spent an average of \$144.08 online on Black Friday, compared with \$135.96 last year. Rakuten Intelligence, which bases its figures

on email receipts from a panel of more than a million U.S. online shoppers, says Black Friday generated 19% more revenue for online retailers than Black Friday 2017.

With total holiday season retail spending expected to grow 4-5%, the weakened interest in shopping around Thanksgiving indicates other influences, namely, the shift to online shopping and retailers' sustained promotional activities, are affecting the industry at large.

Major retailers activated their holiday promotions well ahead of Thanksgiving, drawing sales forward in the season. U.S. e-commerce sales in the first nine days of November grew 13.3% year over year, which is roughly in line with the online sales growth seen throughout 2018. But as Thanksgiving approached, online sales growth accelerated, leaping 25.7% during the Nov. 10-12 period and then remained elevated. From Nov. 1-26 (Cyber Monday), online sales totaled \$58.52 billion, a 16.8% increase from \$50.1 billion spent during the same period in 2017. Many retailers also chose to extend what used to be one-day-only Black Friday offers through the holiday weekend and into Cyber Monday, not to mention retailers that started offering their Black Friday deals on Thanksgiving Day—or before—and then extended them past Cyber Monday and into the week.

\$144.08

Average amount shoppers spent online on Black Friday.

Source: Rakuten Intelligence

“Sales start earlier right after Halloween, and they continue right up to Christmas Day,” says Bill Thorne, NRF’s senior vice president of communications and public affairs. “I think at the end of the day what we’re seeing is that Black Friday remains a traditional, if not emotional, start to the holiday season.”

For instance, eBay Inc. created a “Cyber Week” set of deals that kicked off Nov. 19, the Monday before Thanksgiving, and ran through Cyber Monday, including deals on high-demand products from Apple Inc., Nintendo and Google. Target Corp., meanwhile, ran specials from Thanksgiving morning through the weekend. Cosmetics and subscription-box retailer Birchbox Inc. offered discounts for more than a week, running Nov. 20-28. Cyber Monday was the best day of the Cyber 5 period with the highest sales, new subscriptions and traffic, followed by Black Friday, says a Birchbox spokeswoman.

While online retailers report Black Friday and Cyber Monday are big sales days, they say there are a lot of other big sales days throughout the season.

“One thing we’re seeing across the board is less of a focus on Black Friday as a ‘day,’ and more sustained demand beginning the day before, lasting through the weekend, and continuing,” says Matthew Berk, CEO of coffee retailer Bean Box. “This is in contrast to previous years, when we saw explicit spikes in demand on both Friday and Monday. It’s more like Black Friday/Cyber Monday is becoming a week-long-ish shopping event.”

Tech Armor, an online retailer of mobile device accessories, is also experiencing more even distribution of sales not only during the peak Thanksgiving weekend, but overall for the holiday season, says Peter Marlenga, director of operations.

“As the shopping events become more spread out over the month of November and into December there is less of an emphasis on any particular day or set of days,” Marlenga says. “The spike you used to see in a few days as well as the general December spike is looking more like a November and December plateau.”

Online sales for Tech Armor products via Amazon.com Inc. increased 50% on Black Friday compared with a “normal” sales day in the last few months, Marlenga says. Sales via its website had similar gains on Black Friday and throughout the weekend, he says. “This isn’t as much as we expected but are happy with the jump,” he says.

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OVERCOME THE HOLIDAY SHOPPING SEASON'S BIGGEST CHALLENGES

Criminals are becoming more sophisticated and targeting retailers during their most vulnerable times.

Retailers confront multiple challenges on any given day, but they are exacerbated during peak shopping seasons. While Black Friday and Cyber Monday offer opportunities to significantly boost sales, peak periods also require retailers to effectively manage increased product volume and prevent fraudulent activity, while still providing customers with satisfying shopping experiences.

"Fraudsters continue to evolve and aggressively attack online—especially during the holiday shopping season," says Steve Gray, senior director, payment and fraud, at Radial, a global omnichannel technology and operations provider. "Because of the increased volume, retailers' systems are highly stressed, and fraudsters know that, so they try to exploit it."

One example, Gray says, is by focusing on digital, non-physical orders, such as online gifts cards, gaming codes and software. "These have become priorities because fraudsters have immediate access to the goods and don't have to wait for the item to ship or to try to intercept it."

Retailers that offer in-store pickup are also becoming a greater target for fraudsters, he says. "They know many retailers don't have strong purchaser authentication processes in place, so they place orders on stolen cards and send mules in to pick them up."

Gray says while retailers are focused on managing increased volume during the holidays, they're more vulnerable to fraud attacks. "That's why it's so important for them to have a strong program in place to proactively stop and mitigate fraud."

While fraudsters are becoming more sophisticated and targeting retailers during their most vulnerable times, retailers are also struggling to manage their other big holiday shopping season challenge—providing customers with a frictionless shopping experience.

"A big part of that is the ability to efficiently manage inventory," says Sean Seraphin, Radial's director of omnichannel. "Customers in multiple channels are all vying for the same products. Retailers need to understand their inventory positions and ensure that if a customer sees that a product is available, it really needs to be."

Seraphin says retailers must be able to make inventory predictions during peak seasons and ensure they have the stock on hand to support demand. The only way to do that, he says, is through real-time inventory technology, allowing the retailer to see all of its products in stock and where they are at any given time.

Seraphin and Gray agree that while some retailers address these challenges in-house, a better approach may be to partner with a company that specializes in inventory management and fraud prevention.

"There are vendors that focus on creating effective solutions to these e-commerce challenges," Seraphin says. "Retailers should partner with one of those providers that offers the tools and resources to handle these challenges for them, so they can focus on their business goals."





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This more even distribution of sales throughout the season is not a new phenomenon, but is pronounced this year, says Rob Garf, vice president of industry strategy and insights at e-commerce platform Salesforce Inc.

“With the smoothing of the season’s sales, retailers have responded with a steady drumbeat of promotions and discounts,” Garf says.

Musical instruments retailer Sweetwater Sound was ready for those early shoppers.

“This year, we found success by starting our sales on Nov. 1 and trickled out deals all month long—keeping loyal customers more engaged—and filling in the lull that many retailers now feel in the weeks leading up to Black Friday, where customers postpone shopping to see if a better deal is coming,” says Mike Clem, chief digital officer and senior vice president.

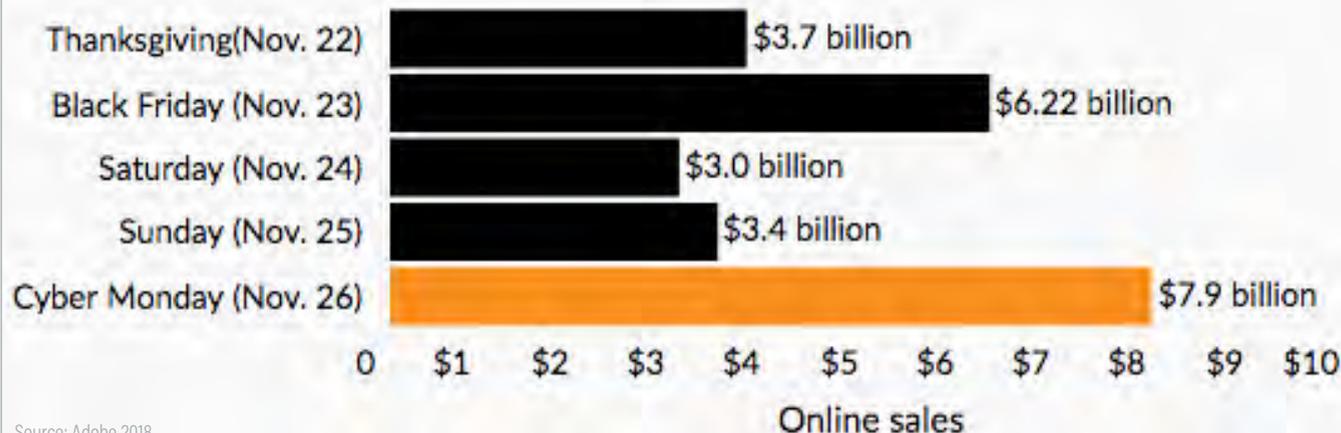
Web traffic and online sales both increased about 20% during the Thanksgiving weekend compared to last year, which is on par with expectations, Clem says.

Despite earlier shoppers, online furniture retailer Renegade Furniture Group still had “robust” year-over-year growth for each of the holiday weekend days so far in the season, says Bruce Krinsky, chief problem solver. Sales since Thanksgiving have roughly increased 40% year over year, he says.

For recreation and sporting goods retailer Dazadi.com, online sales during this holiday season have increased nearly 40% year over year, with the Thanksgiving weekend contributing to that, says Jason Boyce, co-founder and CEO. “We had a very strong Cyber 5 with big double-digit growth,” Boyce told Internet Retailer on the Wednesday following Thanksgiving.

Cyber Monday generates the most online sales

Holiday 2018 online sales by day



Source: Adobe 2018

Web-only apparel retailer Lulus Fashion Lounge had its largest online sales day ever on Black Friday, with online sales up 35% over Black Friday 2017, says a Lulus spokeswoman.

Web-only e-retailer and marketplace operator Newegg Inc. posted “strong double-digit sales growth” Thursday through Sunday, a spokesman says. The value of goods sold by merchants in Newegg’s Marketplace grew 45% year over year over the holiday weekend. Products in the “smart home” category collectively grew sales the greatest amount, up 400% from a year earlier.

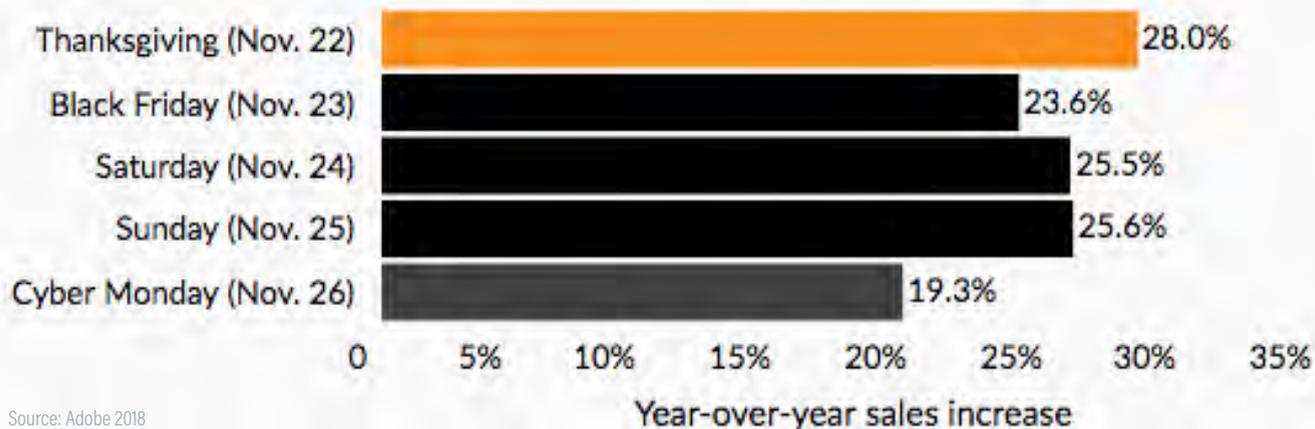
At used watch marketplace TrueFacet, online sales on Black Friday were up 4.5-times the previous 30-day average, says a spokeswoman. Part of the sales lift TrueFacet attributes to mobile sales. While mobile traffic was roughly the same year over year, at 70% of total web traffic, mobile conversion rates increased 89% year over year, TrueFacet says.

The role of mobile in holiday shopping cannot be understated (see page 18 for more). Smartphones alone generated \$2.2 billion in online sales on Cyber Monday, which is a 55.6% increase over Cyber Monday 2017, according to Adobe. The smartphone conversion rate was 3.9%. By device, smartphones generated 30% of sales, tablets 9% and desktops 61% from Nov. 1-26, per Adobe. “Converting mobile traffic to sales has long been a thorn in the side of retailers, but investments in making the experience faster and easier have paid off,” says Taylor Schreiner, director of Adobe Digital Insights.

Flash-sale site Zulily.com focused on its mobile and social audience for the Thanksgiving weekend. On Thanksgiving Day, Zulily had a 300% year-over-year increase on clicks of its mobile app push notifications, a Zulily spokeswoman says. On Black Friday, sales via its mobile apps increased significantly, with a 47% year-over-year sales

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Holiday 2018 online sales growth by day
Thanksgiving had the largest year-over-year sales growth



Source: Adobe 2018

increase in its Android app, and a 28% increase in sales via its iPhone app, she says.

On the social front for Zulily, sales driven by organic social media posts increased 35% year over year on Black Friday, the spokeswoman says. During Thanksgiving week, Nov. 19-24, Instagram-driven sales increased 134% year over year, and Facebook Live-attributed sales increased 125%, she says.

Lingerie retailer Adore Me Inc. has prepped for this peak weekend since Valentine's Day, says Iris Voltaire, business and brand development lead at Adore Me.

The retailer, which launched in 2011, decided to not offer such deep discounts as in years past, as it is now a more established brand, she says. "We know shoppers are ready and they will purchase," Voltaire says.

Instead, the retailer had different offers for new or existing customers, such as a site-wide discount for existing customers, or \$20 for a new customer's first bra and panty set. Ads and email promos focused on Adore Me's best-selling products—in particular a contour bra and panty set. "We did a lot of testing on our ads and email," Voltaire says. "We went with what we know responds well with customers."

In addition, the retailer prepped throughout the year to ensure it had enough inventory to meet demands for the kick-off to the holiday shopping season, and to avoid "out of stock"

messages on its site during this important stretch. The work appears to have paid off as traffic increased 10% and online sales increased 20% year over year on Black Friday, Voltaire says.

Beard products retailer Dream Beard also switched its marketing approach this holiday. In the months leading up to the holiday season the e-retailer encouraged site visitors to sign up for Dream Beard's email newsletter with messaging that only subscribers would get access to special deals during the holidays, instead of using its marketing dollars promoting a specific Black Friday sale, says founder Ryan Lane. The newsletters feature style tips and exclusive deals.

The tactic worked. "We had 30,000 new emails generated and saw a 33% increase in sales from last year with 65% less marketing budget," Lane says.

Web-only retailer Wayfair reported a 58% increase in online sales for the five-day peak shopping period Thanksgiving through Cyber Monday. Wayfair said its sales were highest on Cyber Monday, but Black Friday posted the largest year-over-year increase in online sales.

Sock e-retailer Feat Socks doubled sales from last year and generated \$500,000 on Black Friday and Cyber Monday, says co-founder Taylor Offer. About half of the sales were from new customers and half from existing, he says. Influencers, Facebook and Instagram were the largest sources of traffic to its site during the weekend, Offer says. ■

IN FOCUS: SITE STABILITY

Some retailers had a tough time grappling with too much of a good thing—increased traffic—during the five day period spanning Thanksgiving to Cyber Monday. Retailers including Lowe’s Cos., Walmart Inc., Lululemon Athletica Inc., J. Crew Group Inc., and Kohl’s Corp. all dealt with glitches and malfunctioning websites.

J. Crew extended its 50% off sitewide Black Friday sale through Sunday after it experienced website issues due to the influx of traffic. The site was up and down much of the weekend, and shoppers shared their complaints abundantly on social media.

On Friday afternoon, J. Crew’s homepage was down, with a full-page banner asking customers to “hang on a sec” amid higher than normal traffic. J. Crew online shoppers who managed to access the site had problems as well, and vented their frustration on social media. Complaints included frozen screens and lost carts. J. Crew

sent an email to shoppers Sunday morning extending its 50% off sale through Sunday. “It really does show the importance of investing in logistics and technology,” says Marshal Cohen, an analyst at research firm NPD Group. “They have to be able to handle the online rush.”

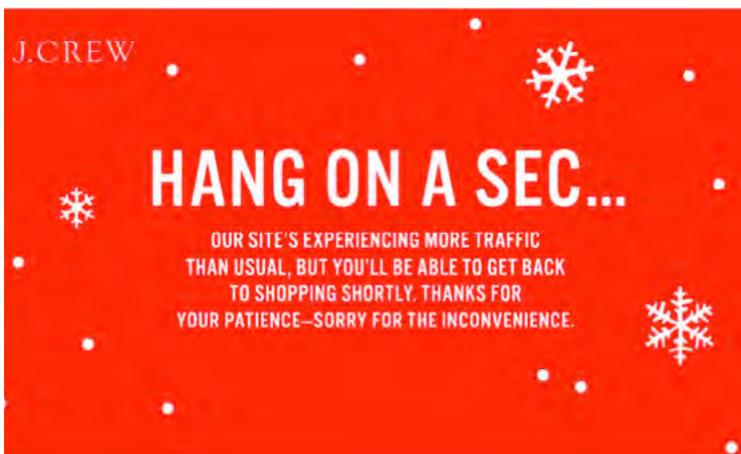
Home-improvement store Lowe’s Cos. temporarily showed an error message on Friday afternoon, noting that “we are making some important changes and should be up and running soon.”

Lowe’s said the website’s “intermittent outages” were due to increased customer traffic.

Lululemon Athletica said on Facebook late Thanksgiving that it was “working hard to get the dot com running smoothly again.”

“Our North American website experienced some minor disruption in service which the team quickly mitigated to restore our guest experience. We are managing closely throughout this week and into Cyber Monday,” a Lululemon spokeswoman said in an email Friday. “We sincerely apologize to any of our guests impacted by this issue.”

A spokeswoman at Kohl’s Corp. said some of its customers had “a less-than-perfect experience” shopping online, but said that didn’t stop the



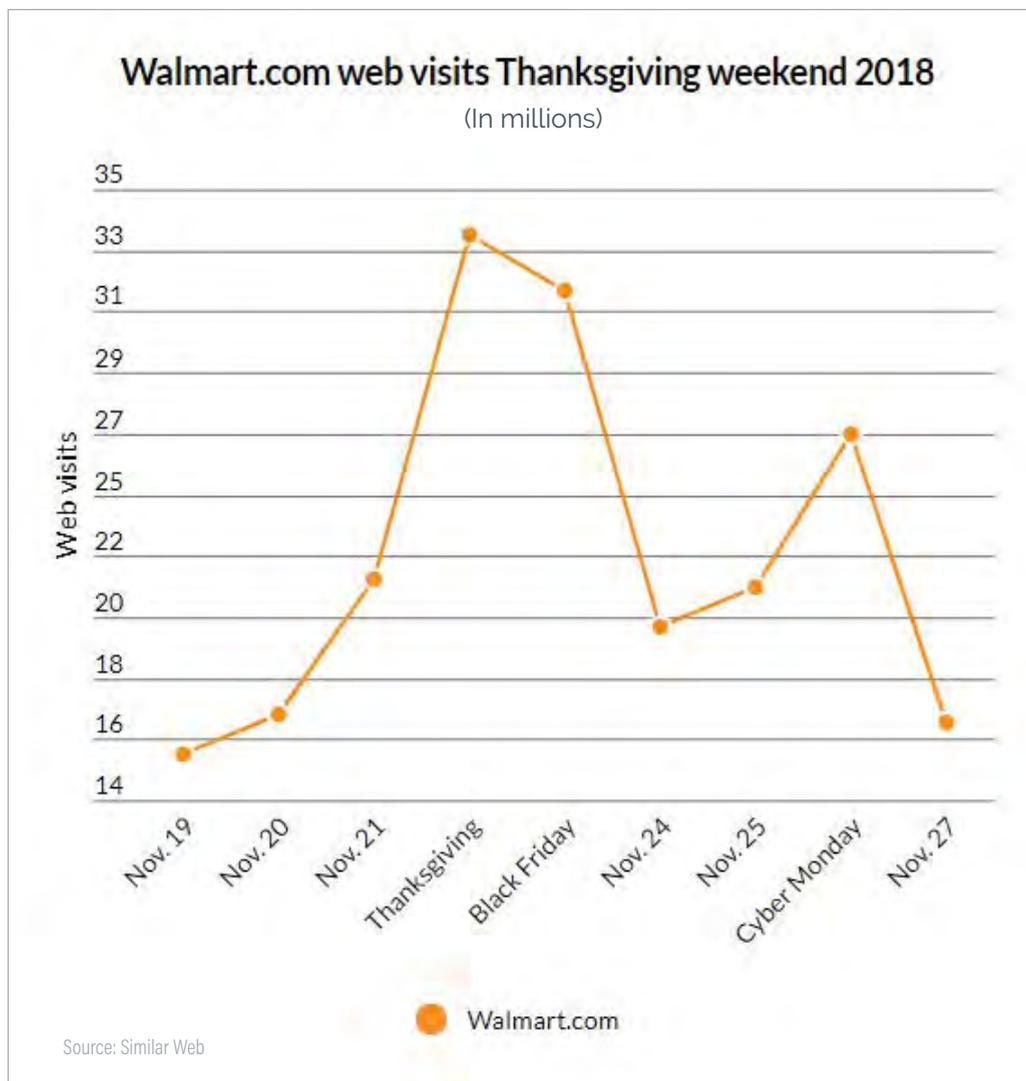
chain from having a record day of online traffic on Thanksgiving Day.

“We are aware of some earlier intermittent technology issues that may have interfered with some customers’ ability to check out quickly and easily. Our teams worked quickly to address and resolve,” she wrote in an email.

Even Walmart Inc., the world’s biggest retailer, reported issues amid higher than expected web

traffic. The big-box store—which saw some of the biggest online-sales increases in the week leading up to Thanksgiving—reported sluggishness on Walmart.com before the holidays even began.

The surge in traffic was no joke, as Walmart.com’s traffic for the entire Cyber 5 weekend was the highest on Thanksgiving Day, according to data from web measurement firm SimilarWeb. ■



IN FOCUS: MOBILE SHOPPING

Between both apps and the mobile web, mobile sales had a stand-out weekend compared with last year.

In terms of revenue, sales made via smartphones on Cyber Monday increased more than 55%, according to Adobe. Plus, smartphone conversion rates were 2.72% on Black Friday 2018, compared with a 2.46% conversion rate on Black Friday 2017, according to aggregated client data from content delivery network and cloud service provider Akamai Technologies Inc. This 2.72% conversion rate also is nearly a 75% increase from the smartphone conversion rate Nov. 4-10, 2018, which was 1.56%, according to Akamai.

Overall for the holiday season, 45% of U.S. consumers plan to use their smartphone for holiday shopping, according to a survey

of 1,200 U.S. adults by mobile performance measurement vendor RootMetrics.

During the five-day period smartphones accounted for 66% of all digital traffic to retail websites and 49% of all orders placed, e-commerce platform and marketing services vendor Salesforce.com reports. Salesforce's data does not include traffic from tablets or traffic to mobile apps.

Salesforce says 54% of all digital orders on Thanksgiving were made from a mobile device, up from 47% a year ago. Mobile devices accounted for 49% of orders on Black Friday and 45% of digital orders on Cyber Monday. Additionally, two sites—Facebook and Instagram—accounted for 94% of social traffic from both mobile and desktop to retail websites, up from 92% in 2017.

Salesforce's results are based on the activities of hundreds of millions of global shoppers accessing sites on its Commerce Cloud. "Consumers went online early, went mobile and went social this Cyber Week, driving healthy digital growth for retailers," says Garf, of Salesforce.

At Benefit Cosmetics LLC, updates to its mobile site have helped boost sales, especially because nearly 80% of BenefitCosmetics.com traffic was via a mobile device, says Cindy Shen,



vice president of global e-commerce and customer relationship management at Benefit. Benefit’s online sales increased 40% during the Thanksgiving weekend compared with last year, Shen says.

“Traffic growth has been strong, but where we’re really seeing pick-up is in our conversion rate,” Shen says. “We’ve optimized our product mix and merchandising with very clear messaging to customers, we made mobile user experience and performance improvements, and our efforts are paying off.”

Mobile also boosted sales growth at LeftLane Sports, says Erik Fialho, chief operating officer.

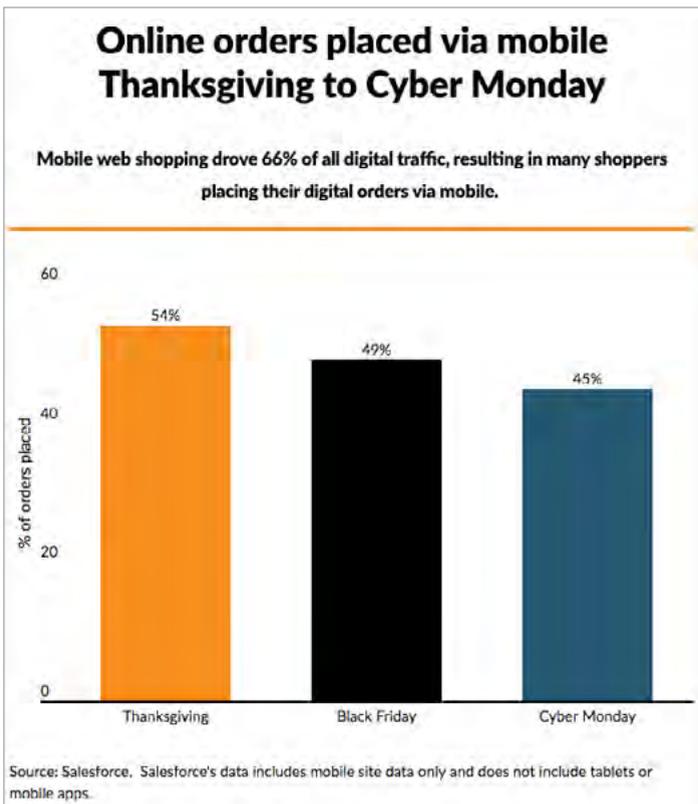
The outdoor gear and adventure travel package retailer operates a handful of e-commerce sites. On its SeshDay.com site, the conversion rate increased 90% on Black Friday through Cyber Monday compared with this time period last year, Fialho says. He attributes the increase in conversion and LeftLane Sports’ overall sales increases to site redesigns and particularly the retailer’s work on its mobile shopping cart.

“Faster site speeds, better filtering technology and Instant Checkout—all launched within the past few months—has led to nearly 400% increases in mobile conversion rates across some of our websites,” Fialho says. Instant Checkout allows shoppers to purchase an item in one click.

Mobile sales also punched a win for peer-to-peer marketplace Poshmark Inc., which had an “all time high of mobile shopping,” says chief marketing officer Steven Tristan Young. Overall sales throughout the weekend exceeded expectations and increased 60% year over year, Young says.

Mobile app use also increased. Visits to mobile apps increased 21% year over year on Cyber Monday, according to research firm comScore Inc. Results from comScore are based on behavioral data collected from the comScore panel, which are combined with customer survey results and other data.

App downloads surged during the Cyber 5 weekend, with U.S. consumers downloading 10 million retail apps Thanksgiving through



Cyber Monday, according to mobile market data vendor App Annie.

The most-downloaded retail-related apps during this five-day stretch, in order, were:

1. Amazon
2. Walmart
3. Wish
4. Target
5. Ebates
6. OfferUp
7. eBay
8. Letgo
9. Kohl's
10. Best Buy



Walmart and Amazon traded places for the top most-downloaded spot throughout the weekend, with Walmart taking the cake on Thanksgiving and Amazon nabbing the top spot on Black Friday and Cyber Monday, according to App Annie.

Consumers downloaded the most apps on Black Friday, with shoppers downloading 2 million retail apps on Nov. 23, which is a 35% increase in average daily shopping app downloads compared with 90 days prior. On Thanksgiving and Cyber Monday, shoppers downloaded 1.8 million retail apps on each day, and shoppers downloaded more than 4 million retail apps between Saturday and Sunday, according to App Annie. ■



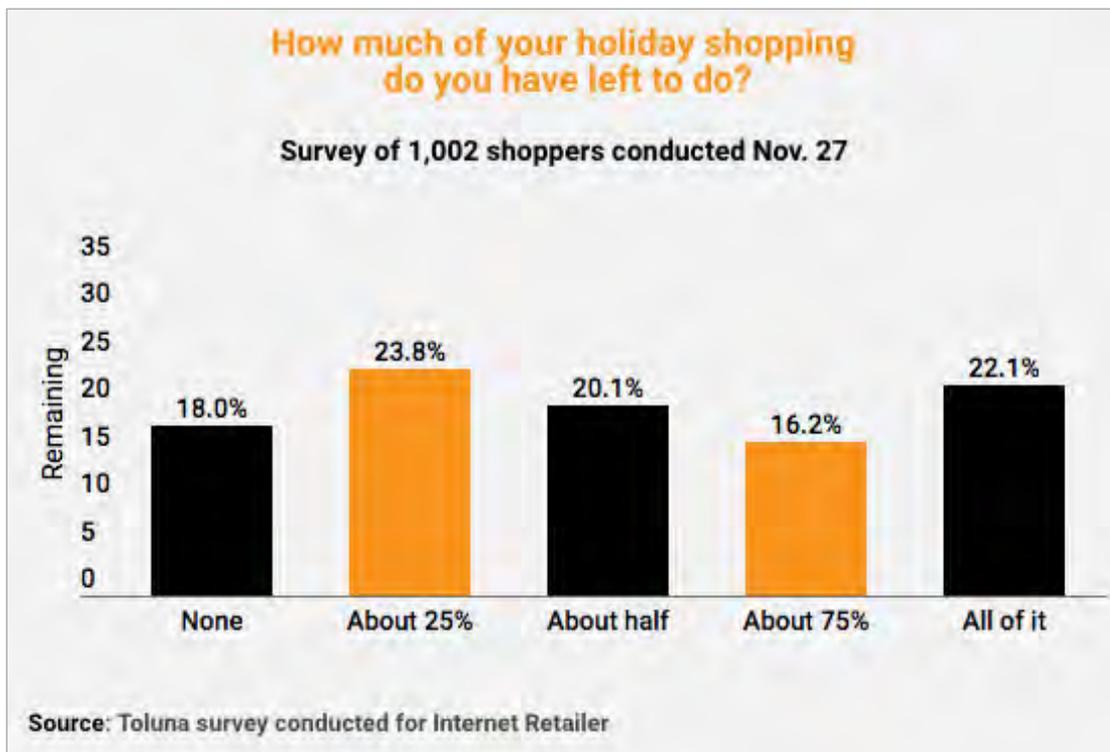
THERE'S A LOT MORE BUYING TO DO

At the close of the Cyber 5, just 18% of shoppers were finished with their holiday shopping. That means there are a lot more sales up for grabs.

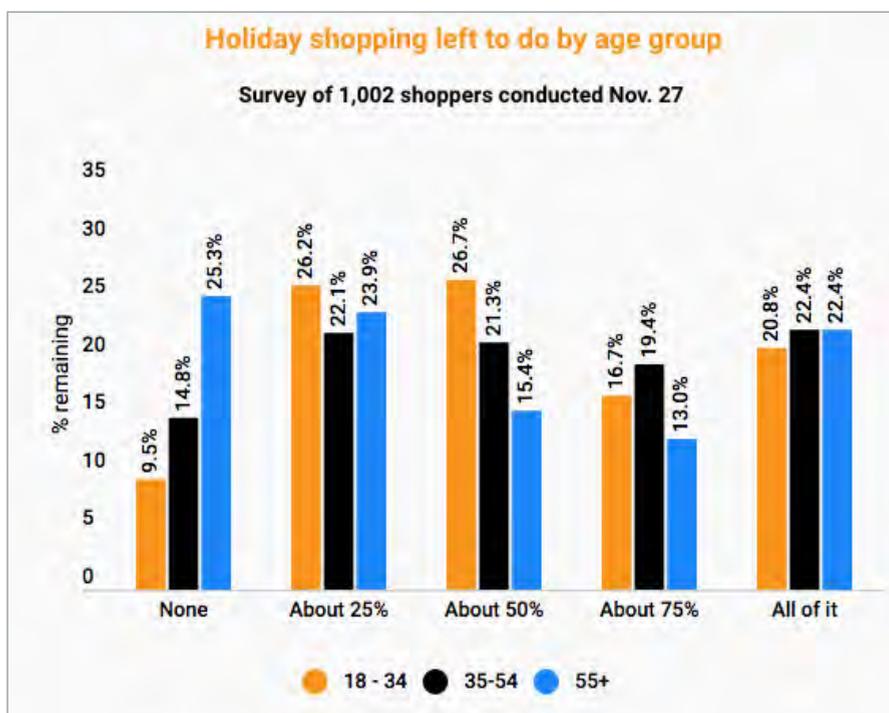
The data shown here are the results of an Internet Retailer survey of 1,002 consumers fielded by Toluna on Tuesday, Nov. 27, the day after Cyber Monday.

2018's Thanksgiving, Black Friday and Cyber

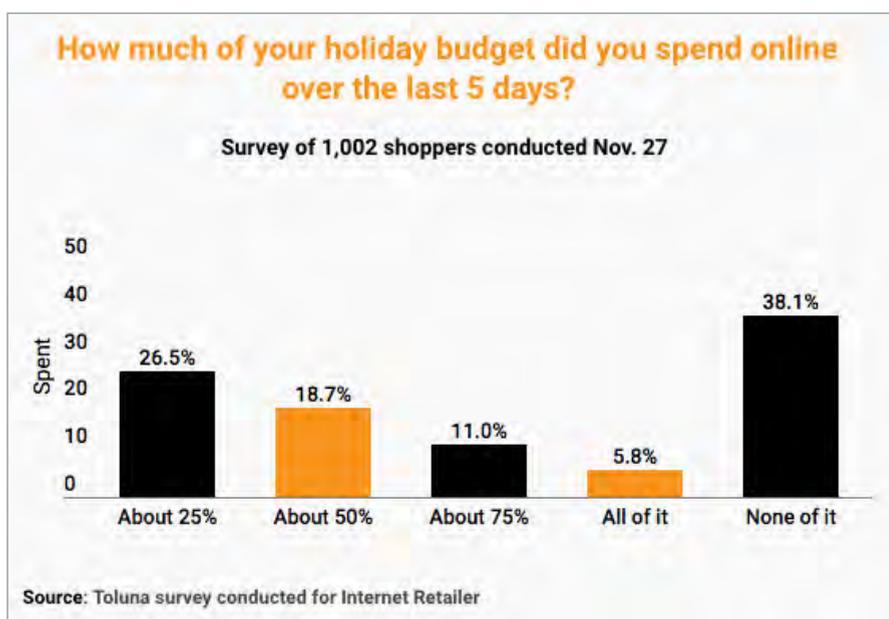
Monday set records for online sales, but, there is still a lot of holiday shopping yet to come. The survey found that close to six in 10 shoppers had half or more of their shopping left to do—and that includes 22% who had not even started shopping. Only about 18% said they had their holiday shopping wrapped up by Tuesday. That leaves a lot of opportunities for online retailers seeking to grab holiday sales between now and Dec. 25.



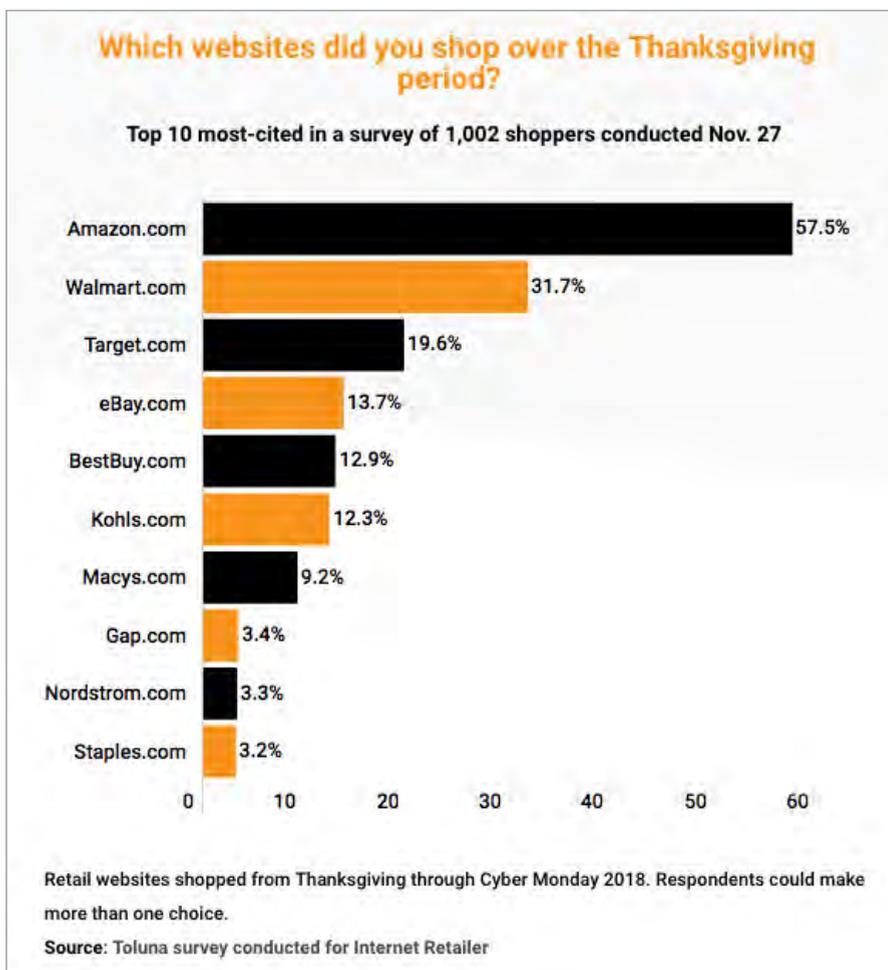
Procrastination seems to have no age bias. Looked at by age group, there was little difference between the percentage of shoppers responding that they had not started their holiday shopping by Nov. 27. There was, however, a large difference in the number of people age 55 and older who reported having their shopping finished (25.3%), compared with those ages 18-34 (9.5%) and ages 35-54 (14.8%).



Asked about their online vs. offline shopping habits during the Thanksgiving through Cyber Monday period, 62% of shoppers said they spent 25% or more of their holiday budget online, while 38% spent none of it online.



A clear majority of the shoppers surveyed shopped at Amazon.com Inc. during the Thanksgiving through Cyber Monday period. After that, the most-cited websites were Walmart.com, Target.com, eBay.com and BestBuy.com. ■



IN FOCUS: AMAZON

Web giant Amazon.com Inc. says U.S. shoppers purchased 180 million more products during the Cyber 5 period in 2018 compared with the 2017 Cyber 5 period, and that Cyber Monday was its biggest shopping day in its history.

That's a claim Amazon makes virtually every year as U.S. consumers increasingly shift a greater portion of their holiday spending online. When looked at on an annual basis, U.S. consumers spend more than \$4 of every \$10 they spend online with Amazon. Amazon's dominance is unrelenting, forcing other retailers to compete harder online and in stores. 33% of shoppers will buy more than half of their online holiday gifts at Amazon, according to an Internet Retailer/Bizrate Insights consumer survey fielded in November.

During the Cyber 5 and during the holiday season, Amazon's market share on a percentage basis dips. That's in part because competitors offer their own deep discounts and consumers are in deal-hunting mode.

Amazon accounted for 24.2% of online sales on Black Friday 2018, according to Rakuten Intelligence data, which is based on email receipt data from nearly 1 million U.S. online shoppers. This is a decrease from Black Friday 2017, when Amazon had 25.7% market share.

Best Buy Co. Inc. and Walmart Inc. increased their share of online Black Friday sales in

2018 compared with last year. BestBuy.com grabbed 7.0% of online sales this Black Friday compared with 6.8% last year, and Walmart.com accounted for 4.5% of Black Friday online sales this year compared with 3.8% in 2017.

On Cyber Monday, Amazon grabbed about 25.2% of the market compared with 28.4% on Cyber Monday 2017, according to Rakuten Intelligence.

For the holiday season measured Nov. 1-24, Amazon.com accounted for 28.1% of online sales in the U.S., compared with 30.2% during this time period in 2017, per Rakuten Intelligence data. This measurement includes goods sold by Amazon marketplace sellers. Amazon says Amazon marketplace sellers increased their sales 20% year over year on Black Friday.

In terms of the volume of products sold on Amazon.com, Amazon's own devices beat out that of any marketplace seller. Amazon says the Fire TV and Fire 7 tablet were among the best-selling products, and Amazon's small smart speaker, the Echo Dot, was the top-selling product globally.

Amazon's mobile shopping app was the most downloaded app during the Cyber 5 weekend, according to mobile market data vendor App Annie. Walmart Inc.'s shopping app was No. 2. ■

SHOPPER SPEAKS: TOMORROW ALWAYS BRINGS ANOTHER DEAL

By Lauren Freedman, consumer insights analyst



Early real-time figures from the holiday weekend indicated total retail sales (stores and online) totaled \$23 billion on Black Friday, the traditional kickoff day for holiday

shopping. That was up only about 9% from the day after Thanksgiving in 2017. What may have dampened Friday's growth figures was obvious to me as I completed my own shopping on Thanksgiving weekend: Prices and promotions started early and held steady through the weekend, taking a bite out of Friday's business.

As a seasoned shopper, I wouldn't even think of visiting a store on Black Friday. Thanksgiving shopping should be sacrilegious, a day reserved for family and football. My hunch was that the deals would be just as strong in subsequent days and much of the product still available on Saturday. With no traffic in my neighborhood and a short shopping list, I decided to head out to the stores and see what I might find.

I was not disappointed as open parking spaces were plentiful and promotions were abundant as soon as I entered the doors, in most cases. In all instances, lines were minimal (one to two-

people deep), or better yet, nonexistent, so once again time was on my side.

And a quick look at the accompanying signage showed a multi-day focus rather than product designated for single day consumption:

- Michael's Stores: Signage upon entering the store that Black Friday Deals were available Thursday-Saturday.
- Best Buy: Deals, which appear to be part of Cyber Week promotion.
- Ulta: Black Friday beauty busters sprinkled throughout the store with stock in place on Saturday.
- Kohl's: Black Friday Deals Week promotions.
- Target: Spend \$50 and get 20% off coupon followed up with a Saturday/Sunday promotion saving \$25 in their Wondershop when you spend \$75.

As the weekend progressed I saw there was no need to fret if I missed the chance to save. If my email inbox on Sunday night was any indication, Black Friday deals had been extended. The markdowns were plentiful. The offers were rolling in but the positioning remained the same. Here

'All holidays almost become interchangeable. The only constant is there will be a sale every day.'

are a few examples that will repeat themselves many times from now until Christmas.

“Last chance” and “final days” messaging was plentiful for the impatient sort. Some, like Lulus, encouraged me to start my Cyber Monday shopping early, and those like Forever 21 highlighted new products for those who frequently visit. All of these approaches reinforced my position that patience is a virtue.

- Forever 21: Totally New: Doorbuster Items Up To 80% Off
- Lulus: We Couldn't Wait: Cyber Monday Starts Now
- Sur La Table: Final Day: Black Friday up to 75% Off
- H&M: Extended! 20% off everything + free shipping
- Steve Madden: Tomorrow? Too late. Today? 40% OFF!!!
- Macy's: Did you hear? Cyber Week is on!

While all of this information is surely insightful, what I'm struck by is we have altered shopping behavior forever. All holidays almost become interchangeable. The only constant is there

will be a sale every day. We have trained our shoppers that waiting has few consequences. A perfect example of that is the retailers who have opened their stores on Thanksgiving and are now splitting their sales with Black Friday. There are only so many helpings to go around this season, and the pie just keeps getting divided based on the number of “open” days. And for those that close on Thanksgiving, like TJ Maxx, or on Black Friday like REI, I'm confident they will still be able to make their numbers.

Retailers set sales and profitability goals, refining them throughout the year. As year-end approaches, they know it is imperative that they hit those numbers. They can gauge their performance to date and determine what they will need to deliver for the December crunch time and just like the wine, the promotions will flow.

Retailers seem to rely less on store-only or online-only sales and the writing is on the wall: A sale is a sale, and cannibalizing one channel from another is finally a non-issue. The only constant seems to be that promotions will be in play almost on a year-round basis.

The shopper wins once again and it is survival of the fittest for retailers to present the best promotions and to deploy them sparingly and strategically throughout the season. ■