

THE CYBER 5 HOLIDAY REPORT



How the peak shopping weekend shook out during this unique holiday season. Find out how a later **Amazon Prime Day** coupled with merchants' **earlier holiday discounts** impacted the kick-off to the holiday season. Also, an analysis of **discounts offered by DNVBs** and a look at why **supply chain snafus** have complicated retailers' overall holiday plans. Plus, an in-depth look at how **fulfillment operation improvements** will outlive the pandemic and a real-world test of how retailers' **curbside operations** fared during the Cyber 5.

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ONLINE SALES GROW A SLOWER-THAN-EXPECTED 20.6% OVER CYBER 5 BUT STILL SET RECORDS

U.S. shoppers spent a record \$34.36 billion on retail websites over the five-day period from Thanksgiving to Cyber Monday, up from \$28.49 billion for the same period last year. Digital revenue missed projections as more shoppers heeded retailer warnings to shop earlier to avoid out-of-stock items or shipping delays and took advantage of pre-Thanksgiving discounts.

By Jessica Young

The usual holiday shopping frenzy during the five-day stretch from Thanksgiving to Cyber Monday—dubbed Cyber 5—looked a bit different this year amid an alarming spike in coronavirus cases that left consumers more comfortable browsing for gifts on retail sites than in crowded stores. It was a huge weekend for ecommerce, with U.S. consumers spending a record \$34.36 billion online, up from \$28.49 billion for the same period last year, according to data from Adobe Analytics. But digital revenue growth was more subdued than projections anticipated as shoppers took advantage of retailers' early season promotions to get a jump on holiday buying and shopping fatigue likely set in by Cyber Monday.



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Online sales for the long holiday weekend rose 20.6% year over year, according to Adobe figures based on transactions from more than 1 trillion anonymous online visits to retail sites, including 80 of the top 100 retailers in the Digital Commerce 360 Top 1000. That was higher than the 17.7% registered in 2019 but significantly lower than Digital Commerce 360's estimate of 34.9% growth for Cyber 5 2020 and Adobe's projected 38.3% for the same period.

Retailers have been encouraging early seasonal shopping for weeks and even months with the goal of spreading out peak-season order volume so as not to inundate overburdened warehouses and shipping carriers that have been operating at or over capacity since the pandemic started. Long-running Black Friday preview deals and "Cyber Days" discounts that were promoted before Thanksgiving softened online sales during the Cyber 5 weekend and cut into gains for big retail days like Cyber Monday.

This is in line with data from a number of sources including Salesforce.com Inc. The technology vendor reported digital revenue grew 29% year over year during what it defines as Cyber Week, which ran from Tuesday, Nov. 24, through Cyber Monday, Nov. 30. That's in stark contrast to the tepid 10% uptick in online sales Salesforce tracked for Cyber Monday alone. The software provider aggregates data from the activity of more than 1 billion global shoppers flowing

through its Commerce Cloud platform and extrapolates its clients' findings to the broader retail industry.

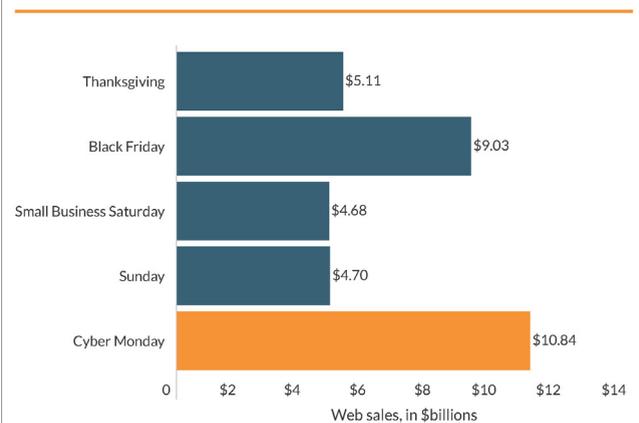
Yet, even with early shopping diminishing the impact of Cyber 5 sales this season, the holiday weekend had a banner year.

Cyber Monday still eclipses Black Friday but loses ground

Although Adobe shows Cyber Monday's digital revenue grew the slowest of all Cyber 5 contenders at just 15.1% year over year, the day still claimed the top spot and raked in a massive \$10.84 billion, up from \$9.42 billion in 2019. But as expected, Black Friday gained ground on its weekend rival Cyber Monday, jumping 21.6% to \$9.03 billion in online sales from \$7.43 billion the year before.

US consumers spent more than \$34 billion online during Cyber 5

2020 ecommerce sales by day, in \$billions



Source: Adobe Analytics, December 2020

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Digital revenue on Black Friday increased by \$1.60 billion over 2019 versus Cyber Monday's \$1.42 billion gain, according to Adobe, leaving Black Friday closer to closing the gap on its competitor. Cyber Monday still accounted for nearly one-third—31.5%—of the five-day period's collective online spending but dropped from a 33.1% share in 2019. Meanwhile, Black Friday represented a greater share of Cyber 5 sales this year at 26.3% than last year's 26.1%.

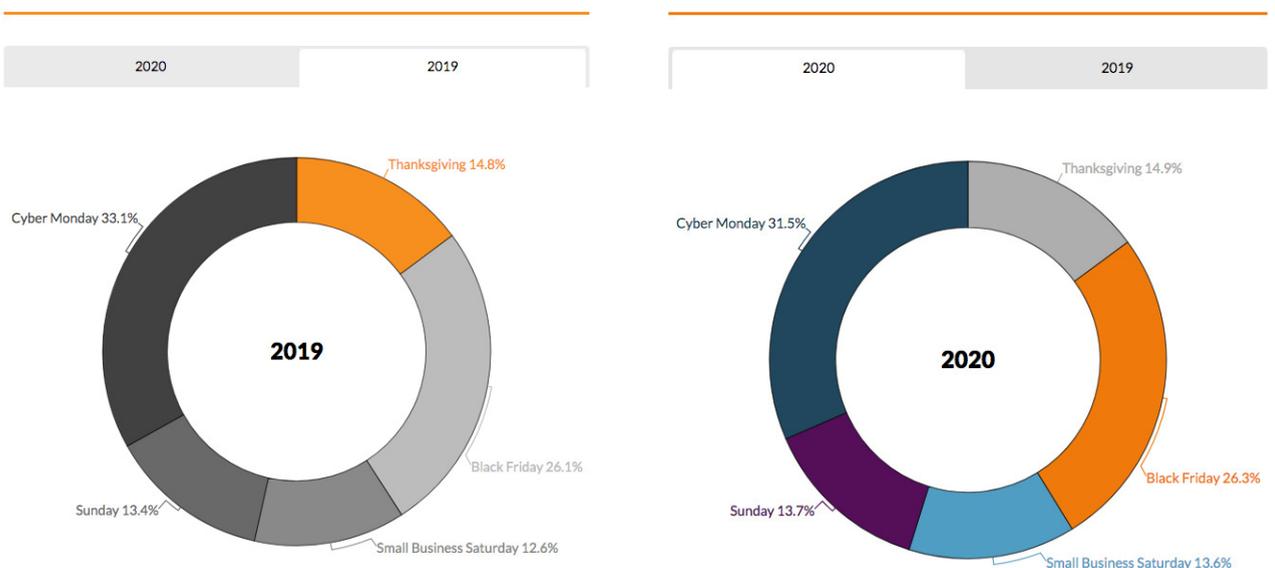
Historically, Black Friday was a store-centric retail sales holiday, with consumers braving jam-packed aisles and waiting in long lines to nab doorbusters. Every year, retail chains have extended more Black Friday sales to consumers

buying online, and the trend was magnified this year as merchants sought to discourage brick-and-mortar crowds and adhere to store capacity restrictions during the pandemic. Traffic to stores on Black Friday was cut in half this year, according to Coresight Research, while for the first time, the number of online shoppers on Black Friday exceeded 100 million, up 8% from 2019, according to a National Retail Federation survey of 6,615 consumers conducted over Cyber 5 by research firm Prosper Insights & Analytics.

According to Adobe, the fastest-growing Cyber 5 day was Saturday, Nov. 28, coined Small Business Saturday a decade ago in a campaign to boost spending with independent merchants.

Black Friday and Small Business Saturday make gains in holiday weekend share while Cyber Monday loses ground

Share of Cyber 5 online sales by day, 2019-2020



Source: Adobe Analytics, December 2020

Source: Adobe Analytics, December 2020

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77% of holiday shoppers said they were more interested in supporting small, local businesses struggling during the pandemic this year, according to the NRF and Prosper survey, and that consumer sentiment was reflected in spending patterns for the day.

Small Business Saturday logged 68.2 million online shoppers, up 17% from the same day in 2019 with a gain of nearly 10 million consumers, NRF says. And overall digital revenue spiked 30.2% year over year to \$4.68 billion from \$3.60 billion the prior year, according to Adobe data. Online sales for smaller retailers—or those with \$10 million-\$50 million in annual revenue—grew by 294% on Saturday compared with an average day in October.

Of all Cyber 5 days, Small Business Saturday increased its share of weekend online sales by the greatest amount, up 1 percentage point to 13.6% this year from 12.6% in 2019, according to Adobe.

Consumers continue to shift buying online

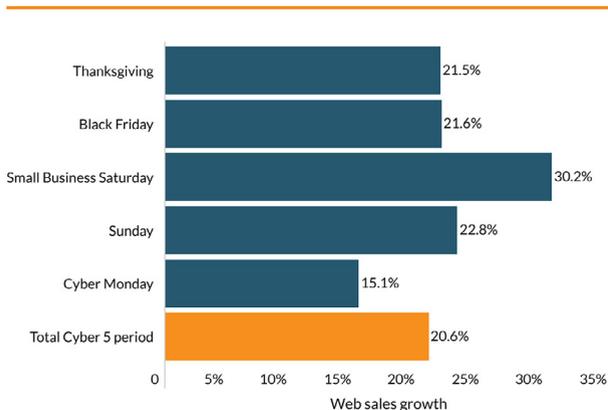
As anticipated, consumers shifted a lot of shopping to the web, skipping holiday weekend store visits entirely or opting for omnichannel services that limited their exposure to others.

57% of holiday shoppers reported shopping more online specifically because of the pandemic, according to the NRF and Prosper survey—an enormous cohort of consumers that adjusted their buying patterns. Online-only shoppers increased by 44% year over year for the Cyber 5 period, reaching 95.7 million, while just over 40 million consumers shopped solely in stores. But an additional group of more than 50 million consumers shopped across both channels.

Many of the latter were likely shoppers who took advantage of curbside pickup, drive-through and buy online pick up in store offerings, which has soared in popularity during the coronavirus outbreak. Online orders fulfilled via buy online pick up in store or curbside pickup jumped 52% year over year on Black Friday, according to Adobe. And on Cyber Monday, curbside pickup sales grew 30% year over year, Adobe says. During Cyber Week, retailers with those pickup options increased digital revenue by 32% more year over year

Online sales grow around 20% for most Cyber 5 days with slowdown by Cyber Monday

2020 year-over-year web sales growth by day



Source: Adobe Analytics, December 2020

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than retailers without omnichannel services, according to Salesforce.

Omnichannel orders will only ramp up as the holidays near and consumers worry about receiving gifts on time.

Shoppers heed warnings about package delays and out-of-stock items

For years, retailers have aimed to “smooth out” peak-season sales to ease the holiday strain on ecommerce sites and fulfillment operations as well as level out revenue. But they hadn’t managed to make a ton of headway—until COVID-19 hit, ramping up the urgency for both merchants and shoppers.

Retailers have made a concerted effort to manage consumer expectations around product availability and potential shipping delays for the holidays in an unconventional year where inventory can be hard to come by and carriers have been pushed to maximum capacity trying to keep up with massive ecommerce surges, according to NRF. And that’s been the case across merchant types and categories, including general merchandise sellers, luxury retailers, specialty apparel, department stores and others.

Digital Commerce 360 also has tracked many of these initiatives. Costco Wholesale Corp., has linked a homepage banner to a message from its president CEO Craig Jelinek about delivery



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delays for weeks now: “This holiday season, online shopping and shipping volumes are expected to be at an all-time high. As a result, small parcel delivery delays are expected. We encourage you to shop early this year to ensure that your small parcel items arrive on time.”

The discount merchandiser assures warehouse members that it’s working with carriers to forecast daily holiday shipping volume and give customers accurate delivery time estimates before they place their orders, displaying updates on Costco.com and providing easy access to order tracking information.

Beauty brand Tarte Cosmetics, which is owned by Kose Corp., also offers its customers a disclaimer on shipping delays: “Heads up, tartelette! Due to high order volume & extra precautions at our warehouse, your package

might be delayed getting to you. We’re working to get your order to you ASAP & will send you an email with tracking information as soon as it ships!”

Jewelry retailer Jared, which is owned by Signet Jewelers Ltd., added a message to its shipping page to warn shoppers that they need to order early: “Due to the current situation with COVID-19, you may experience shipping delays.” There is a Christmas shipping and delivery chart with specific order deadlines for holiday arrival for a variety of items.

Apparel brand The North Face, which is owned by VF Corp., is even blunter on its homepage: “Best way to get gifts on time? Shop early. This year, shopping early is a must. Get first pick of gear (and avoid shipping delays) by ordering ASAP.”

The screenshot shows the Jared website's shipping page. At the top, there's a navigation bar with a menu icon, a location pin, the Jared logo, a search icon, a shopping bag icon, and a truck icon. Below the navigation bar, there's a banner for "FREE SHIPPING • FREE RETURNS" and a "CYBER WEEK IS HERE!" promotion. The main content area features a heading "DUE TO THE CURRENT SITUATION WITH COVID-19, YOU MAY EXPERIENCE SHIPPING DELAYS" followed by "CHRISTMAS SHIPPING & DELIVERY". Below this is a table with three columns: "JEWELRY GIFT TYPE", "ORDER BY", and "ARRIVES BY".

JEWELRY GIFT TYPE	ORDER BY	ARRIVES BY
Create Your Own Engagement Ring	Thursday, December 3, 11:59 PM ET	Thursday, December 24
Personalized Jewelry	Saturday, December 5, 11:59 PM ET	Thursday, December 24
Jewelry Needing Ring Sizing	Tuesday, December 15, 11:00 AM ET	Thursday, December 24
Last Minute Gifts (not sized or personalized) with Two-Day Delivery*	Friday, December 18, 12:00 PM ET	Thursday, December 24

*Must select Two-Day Delivery option at checkout

Jared posts a shipping delay warning on its website.

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Many other online retailers—including Shutterfly Inc., UncommonGoods LLC, Sears Holdings Corp. and Pottery Barn—have highlighted similar language on their sites or in email messaging in the past month or two, and these reminders have successfully nudged consumers to get an earlier start on their holiday shopping this season.

“[Retailers] are trying to sensitize their customers to the changed environment, and consumers are responding to the messaging and evolving their behavior,” says Matthew Shay, NRF president and CEO. “People have been sensitized based both on the messages that have been out there but also on past experiences when, in the early days of the pandemic, there were stock-outs, and retailers were chasing inventory in some categories. And people are responding because they generally are aware of the possibility that, if they wait too long, they’re not going to be able to find what they’re looking for.”

Earlier promotions push shoppers to buy ahead of Cyber 5

42% of shoppers said they will shop earlier knowing that holiday delivery times may be longer this year, according to a Digital Commerce 360 and Bizrate Insights survey of 1,000 consumers in September 2020. While messaging around shipping delays has resonated and appealing to shopper anxiety over out-of-stock items seemed to be effective, retailers also

incentivized early online buying in a big way with sizable pre-Thanksgiving discounts.

The holiday season extended back into October “more dramatically than ever,” Shay says. And more than half of all holiday shoppers—over 52%—said they took advantage of early seasonal sales, according to the NRF and Prosper survey.

There were plenty of promotions to choose from. On Oct. 13, nearly a quarter—24%—of the top 100 online retailers ranked in the Top 1000 promoted holiday shopping on their sites to kick off peak season, according to an analysis of data collected by Digital Commerce 360 researchers during site visits. That was roughly six weeks before Cyber 5 and more than two months before Christmas.

What’s more, 51% of the top 100 retailers offered widespread sales that day beyond normal promotions that are run year-round to compete with Amazon.com Inc.’s delayed Prime Day sales event. Plus, the deep discounts urged consumers to get a jump on holiday shopping. By Nov. 23, 78% of the top 50 retailers in the Top 1000 offered Black Friday deals—four days before the actual retail holiday.

The early push worked. For Nov. 1-19, digital revenue increased a notable 29% over the same time frame in 2019, according to Adobe. And online sales early in the week of Thanksgiving grew at an impressive rate for non-traditional

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retail days: 72% year over year on Tuesday, Nov. 24, and 48% on Wednesday, Nov. 25, according to Salesforce data.

“Heavy discounts and aggressive promotions starting in early November succeeded at getting consumers to open their wallets earlier,” says Taylor Schreiner, director of Adobe Digital Insights.

Big-box retailers outperform department stores during Cyber 5

For the Cyber 5 period, Etsy Inc. was the big winner analyzed by digital commerce intelligence company Edison Trends. The marketplace for sellers of handcrafted goods capitalized on recent consumer commitment

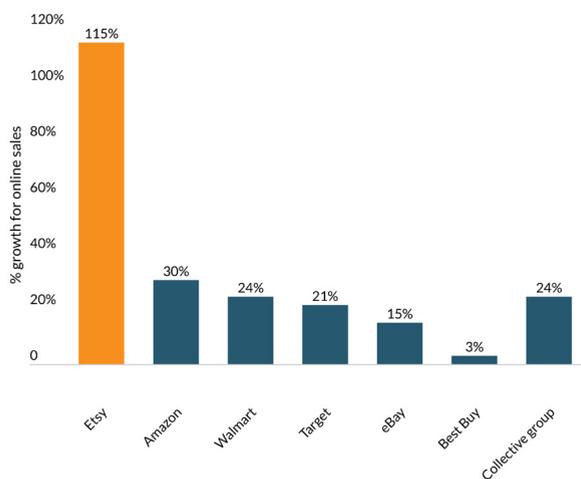
to shop small during the holiday and built on its year of remarkable growth, when the total value of goods sold on Etsy.com (excluding the acquired Reverb marketplace for musical instruments and gear) ballooned by about 90.6% for the first nine months of 2020 versus 2019. During Cyber 5, Etsy more than doubled its online revenue with a 115% year-over-year hike—nearly four times the 30% growth for second-place Amazon during the same time frame, according to Edison.

The collective year-over-year increase in web sales for the two leaders plus Walmart Inc., Best Buy Co. Inc., Target Corp. and eBay Inc. was 24% for Cyber 5, according to Edison. That gels with the overall market’s 20.6% growth for Cyber 5, which makes sense as the performances of the largest players have a disproportionate pull.

Department stores, which have struggled mightily during the pandemic, didn’t fare as well. Edison analyzed data on Nordstrom Inc, Kohl’s Corp., Macy’s Inc. and J.C. Penney Co. Inc. and found this group’s combined online sales dropped 5% during Cyber 5 when compared with the prior year. Nordstrom and Macy’s were the only retailers with an increase in digital revenue, growing sales a modest 6% and 4%, respectively, over the same period in 2019. Edison’s data is based on e-receipts from more than 890,000 online transactions accessed through the email of U.S. consumers.

Etsy leads key retailers in online sales growth during Cyber 5

% year-over-year ecommerce growth, by retailer



Source: Edison Trends; analysis based on e-receipts for more than 890,000 transactions for Nov. 26-Nov. 30, 2020, vs. Nov. 28-Dec. 2, 2019

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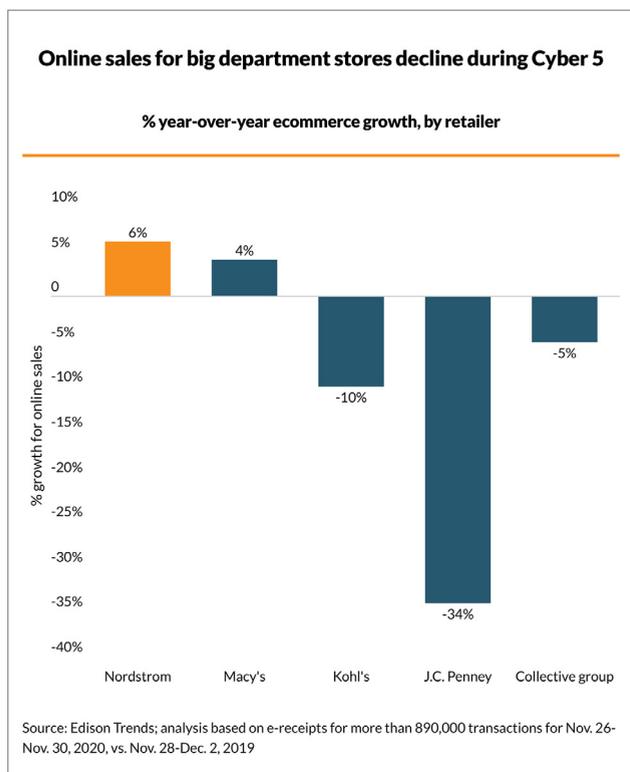
Amazon sellers' strong showing

Amazon reported a record-breaking holiday season to date, although the retailer did not disclose overall sales or growth for the period. The web giant debuted its Black Friday promotions on Oct. 15 in the U.S. with its Holiday Dash deals event, right after its annual Prime Day sales event that was postponed until Oct. 13-14. In fact, 62% of shoppers said they bought holiday gifts during Prime Day this year, and 7% of respondents reported all of their Prime Day purchases were holiday gifts, according to a Digital Commerce 360 survey of 530 shoppers in October. But while consumers shopped earlier this year, Amazon says there was still strong demand over Cyber 5.

Amazon attributed much of its success for the five-day period to consumers' desire to support small businesses that have been hard hit during the pandemic. Independent retailers selling on Amazon—which the company says are nearly all small to medium-sized businesses—had their best-ever Black Friday and Cyber Monday. Third-party marketplace sellers surpassed \$4.8 billion in worldwide sales from Black Friday through Cyber Monday, a more than 60% year-over-year increase from the same holiday weekend in 2019, according to Amazon. More than 71,000 small to medium-sized retailers globally have crossed \$100,000 in sales on the platform so far this season, and small to medium-sized businesses in the U.S. have sold an average of 9,500 products per minute on Amazon.com during the same period.

Percentage changes may not align exactly with dollar figures due to rounding.

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Q&A

Navigating the challenges of COVID-19 during the 2020 holiday shopping season

An executive conversation with **Prashant Bhatia**, senior vice president, technology services, Radial



No holiday shopping season is the same as the last, but 2020 is particularly unique. With standard holiday planning cycles upended, this season, it's more important than ever that retailers provide seamless shopping experiences and paths to purchase online that customers want. To discuss how partnering with a third-party logistics and commerce technology provider will help retailers deliver on their brand promise and exceed their holiday season goals, Digital Commerce 360 spoke with Prashant Bhatia, senior vice president, technology services at Radial.

What are the notable differences between this holiday shopping season and the ones before it?

Many consumers still don't feel safe shopping in stores. They've had a taste of the conveniences contactless shopping options afford and will continue to use them indefinitely. Retailers must rethink how they will conduct future business, especially when it comes to fulfilling brand promises and providing a seamless customer experience across all channels. There's no longer a distinction between ecommerce and commerce—it's all just commerce.

What challenges are retailers facing this holiday shopping season?

They're struggling with the influx of online orders and the resulting strain on their systems, particularly providing a holistic approach, maintaining inventory management and setting fulfillment expectations. Supply chains remain burdened from the earlier days of the pandemic causing slower fulfillment times. Retailers that don't currently use multi-node fulfillment risk irritating customers with longer-than-normal delivery times.

And as most businesses move their stores online, it's easy to forget to take the necessary precautions needed to prevent fraud. Many families will be spending the holidays apart, so there will be a surge in gifts sent to addresses unassociated with the credit card purchase. Although most will be innocent, retailers would be wise to boost their verification processes.

What strategies can retailers use to overcome these challenges?

Omnichannel retailers can offer the safety and convenience of online ordering coupled with the reassurance of same day pickup. Retailers who haven't quite figured out how to merge their online and in-store operations will need to adapt to keep and grow their share of the holiday shopping. They should continue offering click-to-collect services such as buy online pickup at curbside (BOPAC) and buy online, pickup in-store (BOPIS). On-demand delivery with ship-from-store, ship from a fulfillment center or ship from a warehouse will be the new norm moving forward. Retailers who don't have these options will see their customers turn to those who do.

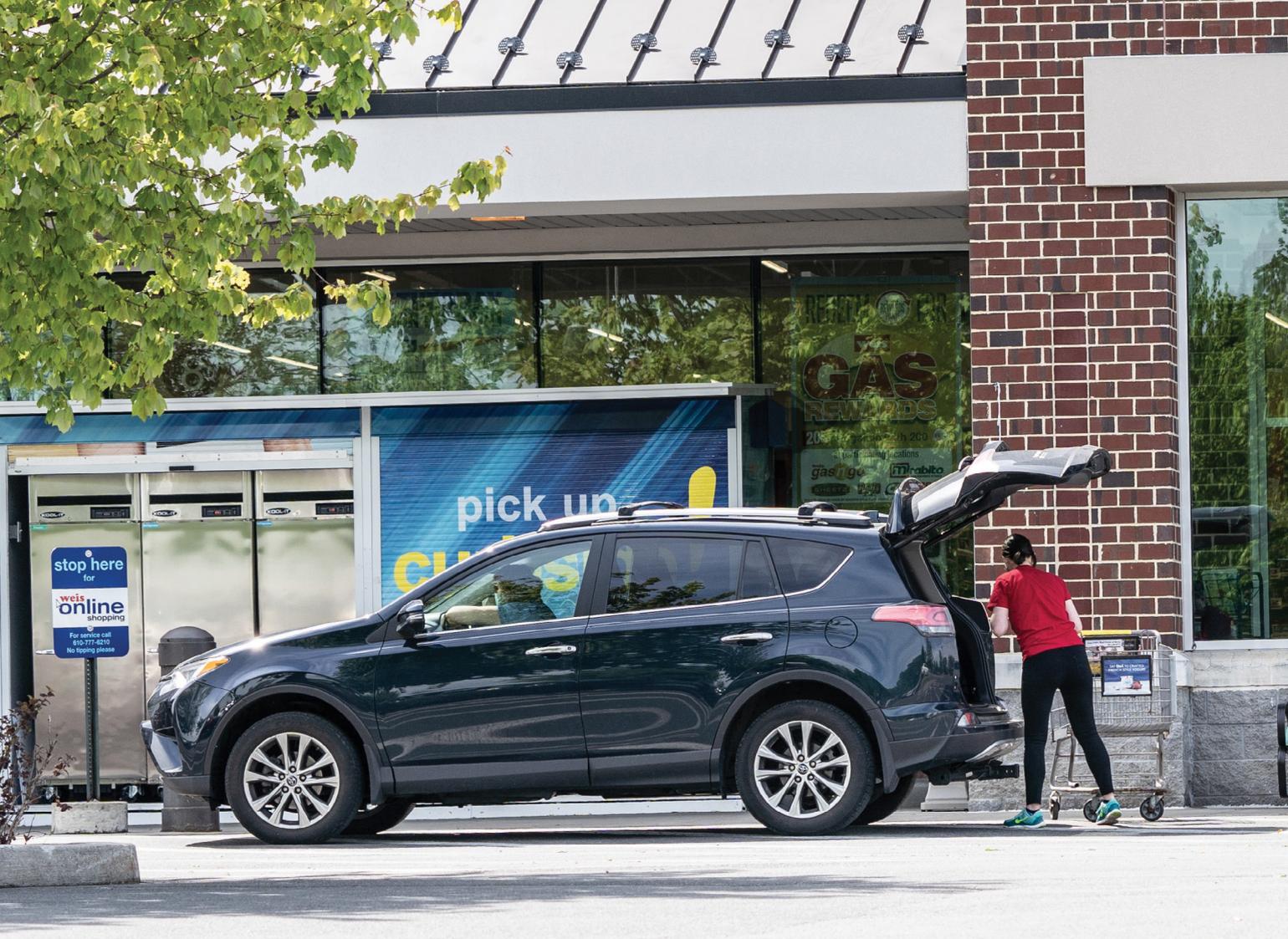
To combat fulfillment and supply chain bottlenecks, retailers should use multi-node fulfillment, ship-from-store and dropship providers. Having pop-up fulfillment centers in heavy delivery areas is another safeguard to ensure delivery times and meeting holiday cut-off dates. Inventory management and optimization will also play a significant role in holiday operations, so having a robust order management system that provides the flexibility to pivot as the season progresses will be critical. And if they can't do it themselves, retailers should hire a third-party provider.

How can a third-party provider help retailers navigate the 2020 shopping season?

A third-party logistics and commerce technology partner can help retailers deliver seamless omnichannel experiences to their customers. Radial, for example, has 30 years' experience providing ecommerce order management, fulfillment, payment, fraud and customer care solutions. With facilities across the globe, we support retailers as they address the challenges of increased ecommerce business—helping them achieve optimal inventory management, supply chain visibility, secure payment processing and meet customer service expectations by scaling on demand.



Radial
a bpost company



Deliver on Brand Promises in 2021

2020 is a year we all want to put behind us, but there's much to learn from the rapidly evolving eCommerce market.

Click-to-Collect Services are Here to Stay: Get ready to make curbside pickup and buy online pickup in-store (BOPIS) permanent offerings. With Radial's robust OMS you can make the configurations necessary for efficient inventory management.

On-Demand Delivery Will Rise: Consumers like the convenience of purchases shipped directly to them. Fully embrace omnichannel strategies to provide flexible shipping options.

As you look ahead, you need a partner you can trust, we're here for you.
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NEARLY ALL TOP 50 ONLINE RETAILERS PROMOTE CYBER MONDAY DEALS

At 88%, most of the top 50 online retailers touted continued online sales or Cyber Monday sales on Monday. Few retailers were warning shoppers of shipping cutoff dates to ensure they receive their packages in time for the holidays.

By Stephanie Crets

Discounting for Cyber 5 began earlier than ever this year, but Cyber Monday still reigns supreme for online promotions and sales.

88% of the top 50 online retailers that Digital Commerce 360 ranks in its Top 1000 offered Cyber

Monday deals, according to site visits by Digital Commerce 360 editors. Only six merchants in the top 50 were not offering Cyber Monday deals. However, most of those retailers are business-to-business-focused merchants such as MSC Industrial Supply Co. Inc., W.W. Grainger Inc. and CDW Corp.



TOP 50 ONLINE RETAILERS PROMOTE CYBER MONDAY DEALS

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Early discounting also was rampant among many online retailers, of the top 50 online retailers, 78% of them offered a “Black Friday” deal on Monday, Nov. 23, four days before Black Friday, according to a check by Digital Commerce 360 editors. Only 11 of the top 50 merchants were not offering a Black Friday deal on Nov. 23.

“With more Black Friday and Cyber Monday shopping happening online, shoppers were ready to comparison-shop and started looking for deals early,” says Rigel Cable, director, analytics and SEO, Astound Commerce. “This meant that retailers were competing for these early sales.”

Widespread promotions helped drive online sales on Cyber Monday to grow 15.1% over last year’s Cyber Monday, according to Adobe Analytics. Adobe’s data is based on transactions from more than 1 trillion anonymous online visits to retail sites, including 80 of the top 100 retailers in the Digital Commerce 360 Top 1000.

“Cyber Monday continued to dominate the holiday shopping season, becoming the biggest online shopping day in U.S. history, despite early discounts from retailers,” says Taylor Schreiner, director, Adobe Digital Insights.

Many retailers specifically called out Cyber Monday, while others emphasized their continued sales events. But only a few retailers changed their type of promotions from the previous week: Winter wear retailer The North Face increased its promotions to 50% off merchandise on Cyber Monday from 30% off on Nov. 23. Neiman Marcus changed its promotion from \$50 off \$200 to up to 75% off products. Pet food retailer Chewy Inc. upped its discount from 10-25% off to up to 50% off products.

“Most retailers are aware that the shopper is savvy and offering discounts throughout the year. It’s more about timing on the part of the shopper,” says Lauren Freedman, consumer insights analyst at Digital Commerce 360. “When they get there, they want the sharpest deal to be present no matter if it’s ahead of the holiday weekend or during.”

The top 50 retailers’ median percentage discount was 50% for the 32 retailers with one major discount figure advertised, according to Digital Commerce 360 site visits.

Beyond the top 50, the average discount rate for U.S. merchants on Salesforce Inc.’s

Most of the top 50 online retailers offered holiday promotions prior to and during Cyber Monday

Percentage of top 50 retailers offering holiday promotions on the specified date



● Holiday promotion before Black Friday (11/23) ● Cyber Monday promotion (11/30)

Source: Digital Commerce 360 editor site checks of the top 50 online retailers.

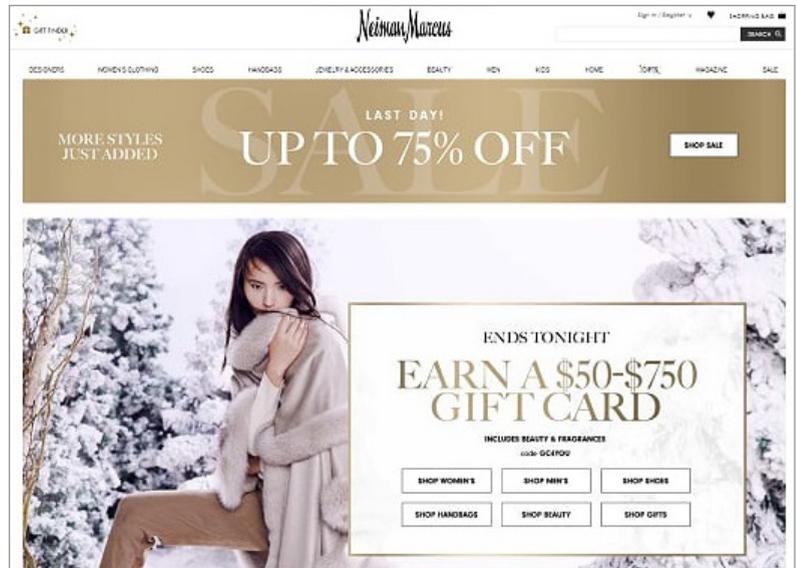
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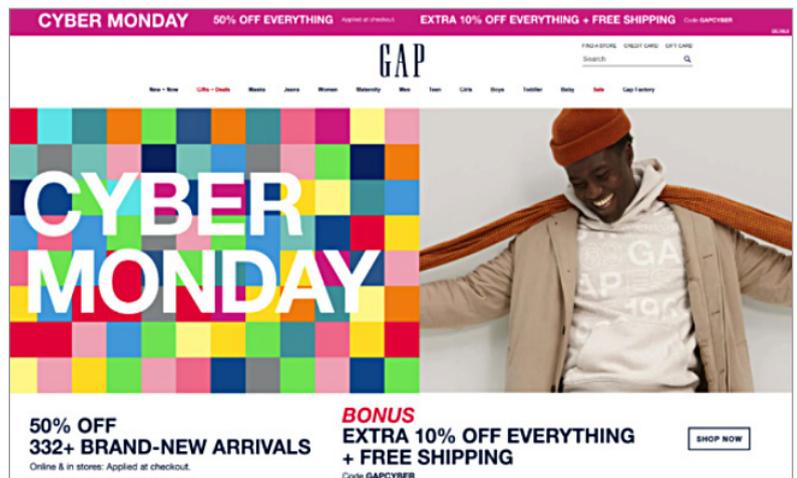
ecommerce platform started at 28% on Thanksgiving in the U.S. and grew modestly throughout the Cyber 5 weekend to an average of 29% on Cyber Monday, according to data from Salesforce. The software provider aggregates data from the activity of more than 1 billion global shoppers flowing through its Commerce Cloud platform and extrapolates its clients' findings to the broader retail industry.

Breaking the deals down more specifically, computers were marked down by 28%, with electronics a close second at 27%, according to Adobe data. Appliances and sporting goods were both discounted by 20%, and toys were 19% off. Discounts will likely weaken by around 5%-10% across most categories in the weeks before Christmas, Adobe says.

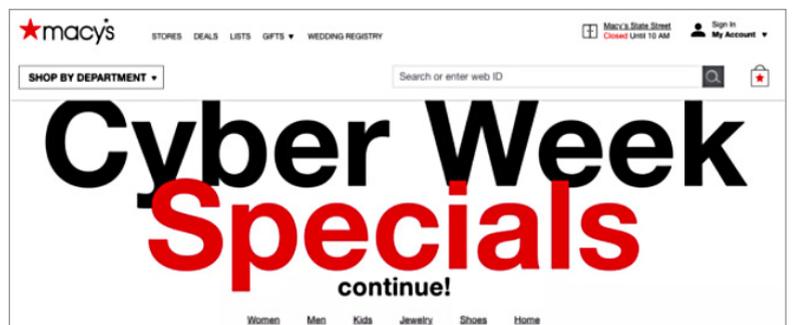
Coupon site RetailMeNot found similar discounting for the online and in-store promotions of its database of offers: The average discount ahead of Cyber 5 was 22% off. Thanksgiving's average discounts were 22%, which was slightly higher than last year's 21.5%. Black Friday also averaged 22% off for discounts, and Cyber Monday's average discount was 23%. Plus, almost 30% of Cyber Monday offers extended into



Neiman Marcus promotes a sale without calling out Cyber Monday specifically.



Gap's homepage promotes Cyber Monday sales.



Macy's homepage touts continued sales for Cyber Week.

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Tuesday and some will extend into Wednesday, RetailMeNot says.

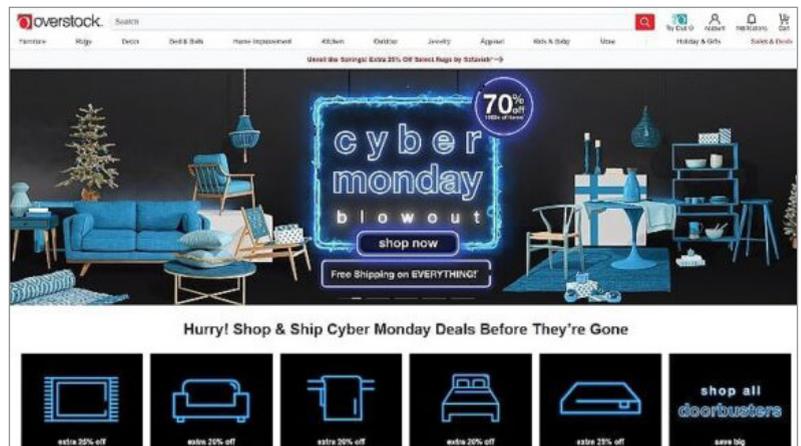
“It probably doesn’t matter that discounts were about the same for Black Friday and Cyber Monday because, ultimately, retailers have trained the shopper to know the deals for their favorite retailers and the role of the holidays may become less significant,” Freedman says.

Too soon for shipping cutoff incentives?

While merchants typically try to get consumers to shop early for the holiday season, the urgency is more real this year, when many retailers are struggling to fulfill online orders in a timely way. The coronavirus pandemic and the subsequent online shopping boom have pushed online retailers’ and shipping carriers’ operations to the brink.

Only a few online retailers were pushing shipping cutoff dates to encourage earlier buying. Video games retailer GameStop Corp. on its homepage had a link note from its CEO “regarding holiday shipping.”

CEO George Sherman wrote that “online shopping and shipping volumes are



Overstock’s homepage theme reflects Cyber Monday sales.



A holiday theme on Williams-Sonoma’s homepage helps promote its Cyber Monday sales.



GameStop promotes Cyber Week sales as well as a letter from its CEO.

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expected to be at an all-time high. As a result, we anticipate the holiday-shipping cut-off date to be earlier this year due to the heavy volumes. Just like you, we know how important it is to receive online holiday gift purchases on-time. To help you avoid any delays in receiving your purchases, we encourage you to shop GameStop early this year to ensure that the video games, home entertainment and pop culture merchandise you purchase arrives on time.”

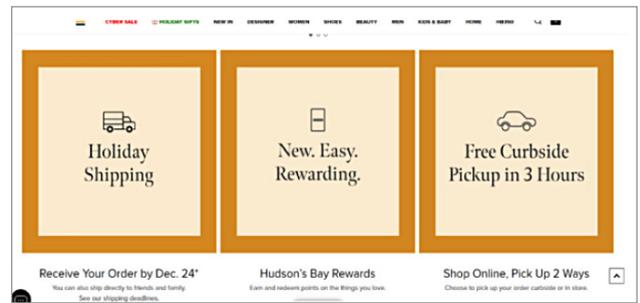
The retailer then details a few methods to provide a more “stress-free” holiday shopping experience: omnichannel options such as Delivery@Door, buy online pick up in store and same-day delivery; coordinating with FedEx to keep a close watch on its daily holiday shipping volumes; and providing the most accurate delivery times. GameStop is also temporarily discontinuing its expedited shipping option because of the heavy volume of orders.

While GameStop is encouraging consumers to shop early because shipping carriers are overwhelmed, only nine retailers in the top 50 mentioned cutoff times for delivery in time for Christmas. For example:

88%

The percentage of Top 50 retailers that offered a promotion on Cyber Monday.

Source: Digital Commerce 360



Hudson's Bay shares information to ensure its customers receive their orders by Dec. 24.



Costco has a note on its site about its shipping policies and time frame due to the pandemic.

- The North Face says shoppers should order by Dec. 14.
- Department store retailer Neiman Marcus tells shoppers to order by Dec. 9.
- Candle retailer Yankee Candle's cutoff date is Dec. 18.
- Apparel retailer American Eagle's order cutoff date is Dec. 12.
- Apparel retailer J. Crew says its shipping cutoff date is "Coming Soon."

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DIGITAL NATIVES RAMP UP DEALS FOR CYBER MONDAY

Of the 77 DNVBs in the Top 1000, 71.4% offered a discount on Cyber Monday. But digital natives are still less likely than top online retailers to offer holiday discounts, and their discounts are often not as large.

By James Risley

DNVBs—which traditionally shy away from discounting—offered plenty of discounts on Cyber Monday 2020. However, DNVBs were less likely to offer promotions before Black Friday, unlike top online retailers that started offering large discounts in November.

Of the 77 digitally native vertical brands, or DNVBs, in the 2020 Digital Commerce 360 Top

1000, 71.4% were offering some kind of discount on Cyber Monday, according to research by Digital Commerce 360. That's up from 69.9% of DNVBs that offered a Cyber Monday discount last year. But DNVBs are still less likely to offer a Cyber Monday discount than top online retailers, as 88.0% of the Top 50 offered a Cyber Monday promotion in 2020, according to Digital Commerce 360 editors.



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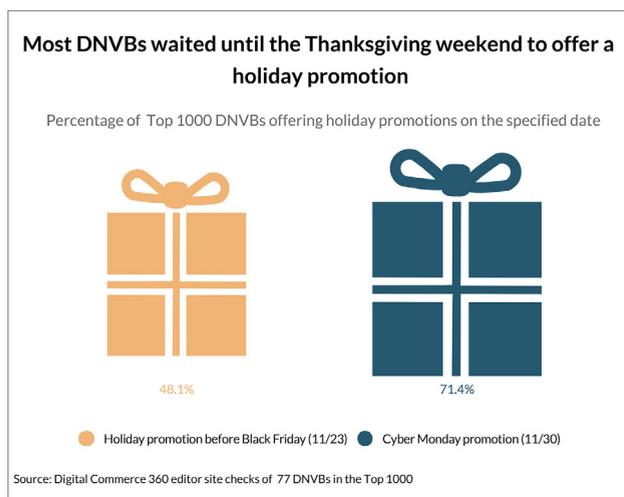
THE CYBER 5 HOLIDAY REPORT

Historically, digital natives have touted products as year-round deals because they claim to cut out the middleman between brand and consumer. However, as retailers age and growth slows, many merchants often turn to discounting to attract new customers and continue growing sales.

Unlike many other top online retailers, many of the DNVB Cyber Monday deals were not available before Thanksgiving. Only 48.1% of DNVBs had a holiday-related promotion going on the prior Monday, Nov. 23, compared with 78.0% of Top 50 retailers.

Of the DNVBs who offered Cyber Monday deals, 20 of them stuck to a true Cyber 5 schedule of releasing deals after Thanksgiving.

Digital natives with stores were less likely to offer online discounts on Cyber Monday. 65.5% of DNVBs that now operate stores offered online Cyber Monday deals, while 78.7% of online-only DNVBs discounted merchandise.



“Clearly, cash flow is under a lot of pressure for those with stores and less so for [online-only retailers],” says Eric Roth, managing director at MidOcean Partners. “The ecommerce guys may well be making a play to take market share.”

Digital natives also offered smaller discounts on average, with a median 30% discount touted prominently for the shopping holiday for the 36 retailers offering a percentage off rather than a dollar total. Top 50 retailers’ median percentage discount was 50% for the 32 retailers with one major discount figure advertised.

Digital natives may not have all offered savings, but many still recognized the holiday. Shoe brand Allbirds went in the other direction, charging a dollar more on Black Friday, which it donated to “Mother Nature” but didn’t specify exactly where the money would be donated. Last year, Allbirds didn’t offer any discounts and only noted the holiday in pictures with a “Make your mistletoes merry” tagline on its homepage. Allbirds did not respond to a request for comment.

Luggage brand Away traditionally doesn’t offer discounts, but it advertised savings this year during Cyber Monday. Shoppers could receive \$125 off holiday luggage sets, with combos like a backpack and duffle bag or a rolling suitcase and packing cubes. Last year, Away told Digital Commerce 360 that its direct-to-consumer model let it offer great prices year-round, precluding it

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from ever offering sales. Away did not respond to a request for comment by press time this year.

Apparel brand Everlane switched from an innovative “Choose what you pay” Cyber Monday deal to a more traditional percentage off structure this year. Previously, shoppers could choose a price and see what the cost would cover

(including things like labor, design and shipping), but this year a banner leads to a page listing items discounted “today only.” Everlane did not respond to requests for comment by press time.

DNVBs offered plenty of more traditional sales as well. Beauty brand Lime Crime offered 30% off sitewide plus extra discounts on certain

MEN WOMEN KIDS GIFTS *allbirds* OUR MATERIALS

Break Tradition, Not The Planet

A Better Black Friday Exclusive

SHOP NOW LEARN MORE

For far too long, Black Friday has been all about finding the best deal, while ignoring the impact overconsumption has on the planet. So this year, we're paying it to the planet. Instead of lowering prices, we're raising them by \$1, and donating the difference to Mother Nature.

LEARN MORE

Allbirds charged \$1 extra on Black Friday to provide donations to nature-related charities.

Save on
HOLIDAY SETS

The Journey Set (\$125 off) The Weekend Set (\$125 off) The Extras Set (\$40 off) The Extra Extras Set (\$40 off)

Luggage brand Away advertised Cyber Monday savings this year, a change from previous years.

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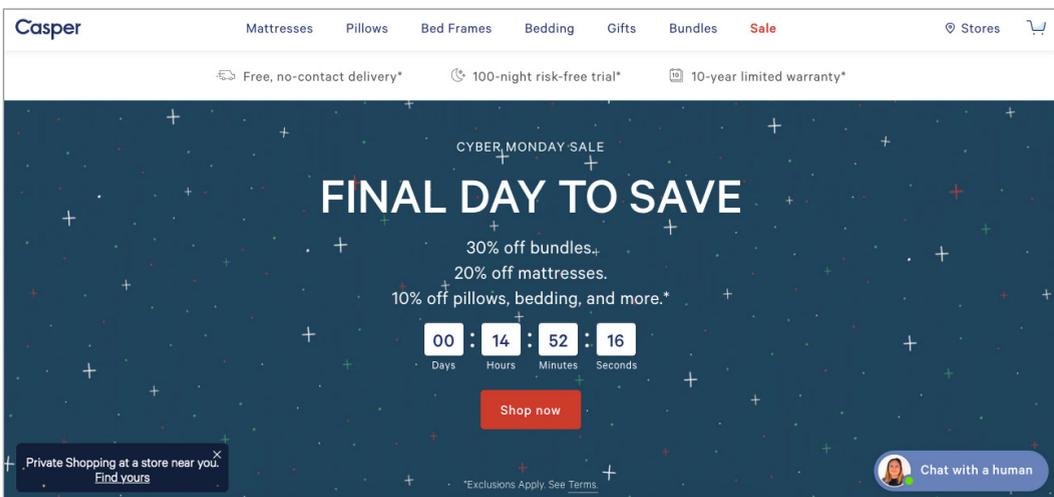
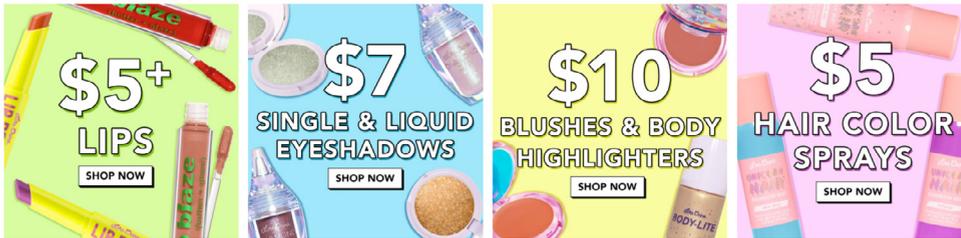
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collections. It also had quick links to groups of products under certain dollar amounts. While it did have holiday language, like “Cyber Week” and “Holiday Collection,” it didn’t have more

traditional holiday themes like photography or color schemes. Mattress brand Casper Sleep Inc. had a snowy background to its deals splash screen, recognizing the holiday spirit.



Lime Crime's homepage on Cyber Monday.



Casper offered a little holiday cheer along with its discounts.

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Fast + free store pickup!

CONTACTLESS DRIVE UP
Availability varies by store; subject to product availability.
[Frequently asked questions](#)

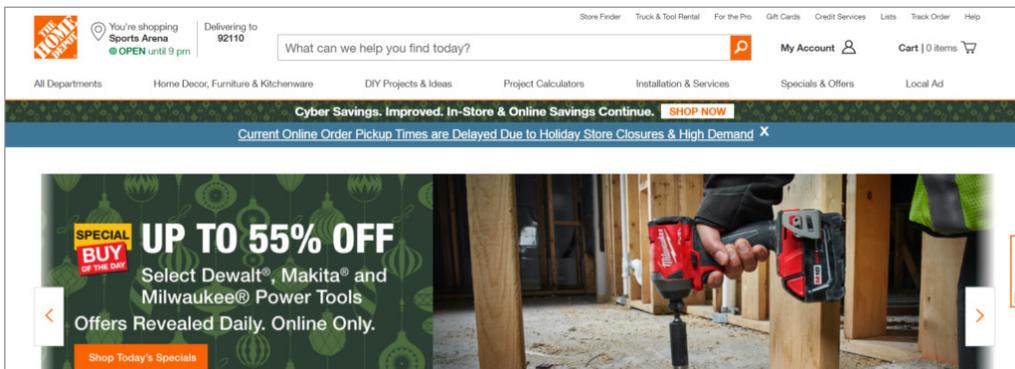
IN-STORE PICKUP
Pick up your order in 2 hours or less, or ship it to the store and pick it up when it arrives.
[Frequently asked questions](#)

Get it in 2 HOURS OR LESS.

Pickup tip: Designate an additional pickup person (or select a different pickup location) and your gift recipient can pick up their gifts in a store near them!

Orders will be ready in 2 hours if you place an order prior to 6:00 PM (local time). Orders placed after 6:00 PM (local time) may not be ready until the following day. Hours may vary by location. To find the location and hours of a Kohl's store near you, visit [Kohls.com/stores](https://www.kohls.com/stores) for details.

Kohl's offers holiday cheer around its omnichannel pickup offerings.



The screenshot shows the Home Depot website header with navigation links like 'Store Finder', 'Truck & Tool Rental', and 'For the Pro'. A search bar is present with the text 'What can we help you find today?'. Below the search bar, there are departmental links such as 'All Departments', 'Home Decor, Furniture & Kitchenware', 'DIY Projects & Ideas', 'Project Calculators', 'Installation & Services', 'Specials & Offers', and 'Local Ad'. A promotional banner for 'Cyber Savings. Improved. In-Store & Online Savings Continue.' is visible, along with a 'SHOP NOW' button. A secondary banner for 'UP TO 55% OFF' on 'Select Dewalt®, Makita® and Milwaukee® Power Tools' is also shown, with a 'Shop Today's Specials' button. A 'Feedback' button is located on the right side of the banner.

Home Depot subtly nods to the holiday season with header backgrounds and even the color of the tool it features on its homepage.

Overall, DNVBs' holiday spirit was more limited to text on the website than Top 50 retailers like Kohl's Corp. or The Home Depot Inc., which had holiday imagery throughout the site and gift guides.

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FULFILLMENT OPERATION IMPROVEMENTS WILL OUTLIVE THE PANDEMIC

The pandemic-driven demand and the need to protect workers prompted e-retailers to make fulfillment safer and more flexible. Those changes will endure after the COVID-19 crisis fades away.

By James Melton

The COVID-19 crisis presents e-retailers with two significant challenges: Meeting an expected record-breaking demand for online shopping during the holiday season while also keeping their employees safe and healthy as they fulfill those orders.

Those goals are not mutually exclusive, but meeting each objective at the same time requires innovative thinking and money. As a result, the pandemic-plagued 2020 holiday season prompted a significant evolution in the way ecommerce retailers of all sizes process orders and get products to customers. Giants like Walmart Inc. and Amazon.com Inc. have announced high-profile fulfillment improvements that will make them more agile in the future. And smaller retailers are finding their own ways to adapt to the new reality.



Many of the new practices aimed at making ecommerce fulfillment more flexible, scalable and healthy will endure after the pandemic fades away, experts and retailers say.

Walmart adds 'pop-up' ecommerce centers

To help deal with the expected surge in ecommerce demand, Walmart announced plans to create “pop-up ecommerce distribution centers” in 42 of its regional distribution centers, which ordinarily provide pallets of goods to Walmart stores.

Walmart expects the pop-up ecommerce distribution centers to ship up to 30% of Walmart’s holiday volume. After the holiday, the centers “will have the flexibility to scale up and down, and the lessons learned will be applied



42

The number of pop-up ecommerce distribution centers Walmart added in its regional distribution centers to help with surging ecommerce sales.

as we continue to further evolve our network in the future,” says Srinu Venkatesan, executive vice president at the retailer’s Walmart Global Tech unit in a recent blog post on LinkedIn.

In addition to adding flexible ecommerce capacity, Walmart pledges the pop-up centers will consistently follow “the health and safety measures we have had in place for months.” Those measures include extra cleaning and sanitizing work areas, requiring employees to wear facial coverings, and instructing workers to do things like avoiding close contact with sick people, washing hands frequently and practicing social distancing.

“This move from Walmart is particularly timely as the nation is seeing a new wave of COVID-19 surges, which will make shoppers less inclined to go to the store,” says Meyar Sheik, president and CEO of Kibo Commerce, an ecommerce technology and order-fulfillment services company.

The pop-up fulfillment centers also are “a direct shot across the bow to Amazon,” Sheik says. “The move from Walmart further levels the playing field against Amazon’s distribution and logistics advantage as it pertains to expedited shipping options such as one-day or same-day delivery.”

Walmart says it developed new supply chain systems and enhanced others to make its new pop-up distribution centers work. “This means

facilities that have traditionally only supplied products to stores are now equipped to also fulfill online orders, just in time for the holidays,” the statement says.

In his blog post, Venkatesan says the changes included implementing a “random stow” process at its fulfillment centers. Random stow involves storing items in a randomized order to maximize the chance that multiple items on the same order are near each other. Among other things, Walmart also adopted a “single cloud-based integration platform managing multiple third-party fulfillment solutions,” Venkatesan writes.

In late September, Walmart announced plans to hire more than 20,000 seasonal associates nationwide in its ecommerce fulfillment centers. The seasonal positions in Walmart’s fulfillment centers are in addition to hiring more than 500,000 new employees from March through late September across its stores and supply chain locations in response to increased demand for groceries and essentials caused by the COVID-19 pandemic.

Cleaning, masks and social distance

At personalized gifts retailer GiftsForYouNow.com, new safety measures this year include mandatory mask-wearing, social distancing and the addition of a dedicated cleaning crew at its warehouse to clean and disinfect work stations, says Jim Tuchler, president. The retailer also has added a staffer

to check employees’ temperatures and ask screening questions as they enter the facility.

“We have had zero cases [of COVID-19] that have been transmitted here,” Tuchler says. “We do have instances of people who work here who have been exposed elsewhere.” In those cases, he says, the retailer requires employees to quarantine and then does not allow them back without having a negative coronavirus test.

The retailer also reduced the number of employees present in the building during its daytime shift, Tuchler says, making it easier for employees to maintain social distancing. It also increased ventilation in its warehouse by running fans and keeping doors open and installed barriers in its lunchroom so employees can maintain physical separation while eating.



150

The number of process updates Amazon adopted during the pandemic.

By doing what it can to avoid coronavirus transmission, Tuchler says, the retailer also helps its employees avoid catching seasonal cold and flu viruses. Partly because of that, some of the measures imposed to fight COVID-19 might become permanent, he says.

GiftsForYouNow is not alone in finding ways to adapt. According to Kibo's Sheik, as the pandemic drags on, ecommerce retailers are getting better at working within the new reality.

"At the onset of COVID-19 and the initial lockdown, retailers were confused and challenged as to what the local and state guidelines were in order to properly address social distancing measures," Sheik says. Since then, he says retailers have learned to address social distancing guidelines and other public health and safety procedures at their warehouses, distribution centers, fulfillment centers and stores. All that has helped them prepare for a longer and vastly different holiday sales season in 2020, he says.

"Throughout these months, we have seen mobile traffic increase as well as a surge in online orders. This activity has led to increases in BOPIS [buy online pick up in store] and ship-to-home activity, meaning retailers have had to further adapt their fulfillment options to satisfy consumer demand," Sheik says.

Retailers adapted to the pandemic in numerous ways. For example, retailers with many stores introduced additional pickup options that use their physical infrastructures. That includes using stores as micro-fulfillment centers and exploring the concept of dark stores that fulfill online orders, Sheik says.

They also have added fulfillment options like BOPIS, curbside pickup, ship from store and buy online return in-store, he says.

Like GiftsForYouNow, many retailers now require temperature checks for employees, says Steve Scales, a director in the retail practice at AlixPartners LLP, a multi-industry consulting firm. It is also common for retailers to impose stringent requirements for personal protective equipment (PPE) to keep employees safe, he says.

"Updated procedures we've seen include employees being required to clean their area before the next shift starts and altered pick-path routes to only allow for one-way traffic in the [distribution center]," Scales says.

Other safety measures warehouses can implement include physically spreading out employees by changing warehouse floor layouts and staggering shifts and breaks to prevent large influxes of people from eating lunch at the same time or entering or exiting the facility simultaneously, he says.

Technology to the rescue at Amazon

Amazon has used technology to enforce social distancing by measuring the space between workers. In June, the ecommerce giant unveiled its Distance Assistant technology. Distance Assistant, which provides employees with live feedback on social distancing, uses a 50-inch monitor, a camera, a local computing device and depth sensors to measure the distance between employees. Each standalone unit also uses machine-learning models to differentiate people from their surroundings.

As people walk past the Distance Assistant camera, the monitor displays live video with visual overlays. People six feet or more apart are highlighted with green circles and those closer together are highlighted with red circles. Amazon later made Distance Assistant software and artificial intelligence technology available

as open-source technology available to organizations of all kinds.

The social-distancing technology is part of the more than 150 process updates Amazon adopted during the pandemic, including mandatory mask-wearing, temperature checks, onsite COVID-19 testing, distribution of PPE to employees, enhanced cleaning and spraying disinfectants in the workplace.

An Amazon spokeswoman says the retailer is now conducting thousands of coronavirus tests per day and can increase that number to 50,000 tests a day across 650 sites.

In late October, Amazon said it promoted 35,000 employees in North America and planned to create an additional 100,000 seasonal jobs during the 2020 holiday period. As of Nov. 17, a



Amazon's Distance Assistant uses a 50-inch monitor, a camera, a local computing device and depth sensors to measure the distance between employees.

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spokeswoman said Amazon had seasonal full and part-time roles available across the U.S. and Canada, as well as regular full and part-time roles.

Shipping from stores, spacing out demand

One way to add flexibility to their fulfillment operations is to fulfill online orders from stores, Scales says.

“We see retailers in general gearing up their stores to handle more fulfillment than ever this holiday season, particularly if their stores are shut down due to COVID,” Scales says. “This strategy enables retailers to leverage fulfillment capacity, inventory and available labor to augment more traditional distribution center fulfillment methods.”



Amazon uses technology to enforce social distancing by measuring the space between workers.



Amazon's Distance Assistant provides employees with live feedback on social distancing.

FULFILLMENT OPERATION IMPROVEMENTS WILL OUTLIVE THE PANDEMIC

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Fulfilling from stores also helps retailers mitigate some of the risks of operating during the pandemic—a key focus for retailers this year, Scales says. For example, shutting a store due to COVID-19 restrictions have a much smaller impact on a retailer's capacity than closing a large distribution center.

Some retailers want to use their stores to minimize the need to ship products or reduce the distance retailers ship the items. Kohl's Corp. CEO Michelle Gass says the retailer wants to raise awareness of its curbside and in-store pickup services, so more consumers retrieve

online purchases at stores rather than have them shipped to their homes. Old Navy CEO Nancy Green, meanwhile, said the budget apparel chain is shipping more products directly from stores to customers' homes, according to Bloomberg News.

Scales says retailers, including Best Buy Co. Inc., now have micro-fulfillment centers near urban centers designed to enable faster delivery throughout the year and augment overall distribution capacity during the peak holiday season. This year, he says, that's an especially good idea because many major carriers may again have to impose location-specific shipping



volume limitations on retailers if the pandemic doesn't abate this holiday season. "Spreading the shipping points across stores and micro-fulfillment centers could help retailers bypass this constraint," he says. That's because if one fulfillment center reached the volume limit set by a carrier, the retailer might be able to ship an item from another center that has not reached its limit.

Another common strategy, Scales says, has been enticing customers to shop early. "Black Friday sales have actually already started, and we expect sales events to continue to span from Prime Day—which, of course, was in October this year—through Christmas," Scales says. "Digital retailers are attempting to get consumers to begin to purchase earlier to flatten the demand curve and thereby make fulfillment somewhat easier."

Tuchler at GiftsForYouNow adds that the impact of earlier holiday shopping is changing the flow of orders this year. He expects 10% of the orders the retailer might otherwise get in December to shift to November. Tuchler says he expects GiftsForYouNow to benefit from increased ecommerce demand. Still, seasonal labor availability—essential to a retailer like GiftsForYouNow, which sells personalized

products—limits his ability to capitalize on increased ecommerce demand.

To attract more people, Tuchler says, GiftsForYouNow raised wages, which allowed it to recruit a better, more productive staff. But even so, Tuchler tempered his expectations and is trying not to overreach this year. "I don't really want to take all I can get; I'm just taking some," he says about the increased ecommerce demand.

Rising costs to spur innovation

While the pandemic has spurred a lot of ecommerce demand, AlixPartners' Scales says it also has generated extra costs. "Although many direct-to-consumer retailers have experienced significant revenue growth this year, we've generally seen fulfillment costs rise at a faster rate, as much as 5% to 15%," he says. That's primarily due to the costs involved with changing distribution centers' layouts, changes in picking paths and required additional labor required.

"In general, we anticipate that the supply chain risks exposed through COVID will ultimately accelerate investment in digital transformation, as companies look for ways to overcome these types of bottlenecks," Scales says.

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SUPPLY CHAIN SNAFUS SNARL ONLINE RETAILERS' HOLIDAY PLANS

The coronavirus pandemic forced many factories to close in China and elsewhere early in the year, and now retailers are struggling to get merchandise for the holidays because shipping lanes are clogged. With online sales soaring and some products in short supply, web merchants are cutting back on discounts. And they're evaluating how to minimize similar problems in the future.

By Don Davis

In a normal year, online retailers focus on how they're going to sell their merchandise during the holiday season. This year, they're spending a lot of their time trying to get products to sell.

Merchandise is in short supply for two main reasons: The coronavirus pandemic forced many factories to close early in the year, and many are still catching up. And a spike in ocean freight during the catch-up period is delaying the arrival of goods into e-retailers' warehouses.

Gordon Industries, an importer and wholesaler that operates such retail websites as ChristmasCentral.com





'We have no discounts planned because we see no reason to.'

— Nathan Gordon, chief information officer, Gordon Cos.,
parent of ChristmasCentral.com

and PoolCentral.com, illustrates the bind facing many online merchants. Nearly 20% of the 250 containers of goods the company ordered for fourth-quarter delivery had still not arrived as of early November, whereas last year all its holiday merchandise had been received by the first week in November, says chief information officer Nathan Gordon.

With online sales up 125% year over year, Gordon is facing soaring demand and limited supply. His solution: Sell everything at full price.

"We have no discounts planned because we see no reason to," Gordon says. When approached by wholesale customers like apparel chain Kohl's Inc. and online marketplaces like Walmart.com and Target.com about discounts he can offer them for their holiday specials, "We've said the answer is just no," Gordon says.

Other online retailers facing product shortages are taking similar steps to beef up profit margins, including cutting back on advertising and limiting sales on outside websites, such

as Amazon.com and deal sites, that take a commission off of each sale.

Looking beyond the 2020 holiday season, some e-retailers are considering whether they can manufacture some goods closer to home in hopes of having better access to inventory in a future crisis. But the higher cost of manufacturing in the U.S. remains an obstacle, many retailers say, although the higher margins brands generate when they sell directly to consumers may allow them to produce some items domestically.

Shipping delays and higher transportation costs are widespread

The pandemic caused supply problems for many kinds of organizations, according to the Institute for Supply Management (ISM), a professional organization of supply chain managers. In a May 2020 survey of 676 U.S. companies, ISM found that 36% of those sourcing goods from China faced severe supply chain disruptions, versus 26% of those purchasing from suppliers in Europe and 15% buying from U.S. producers.

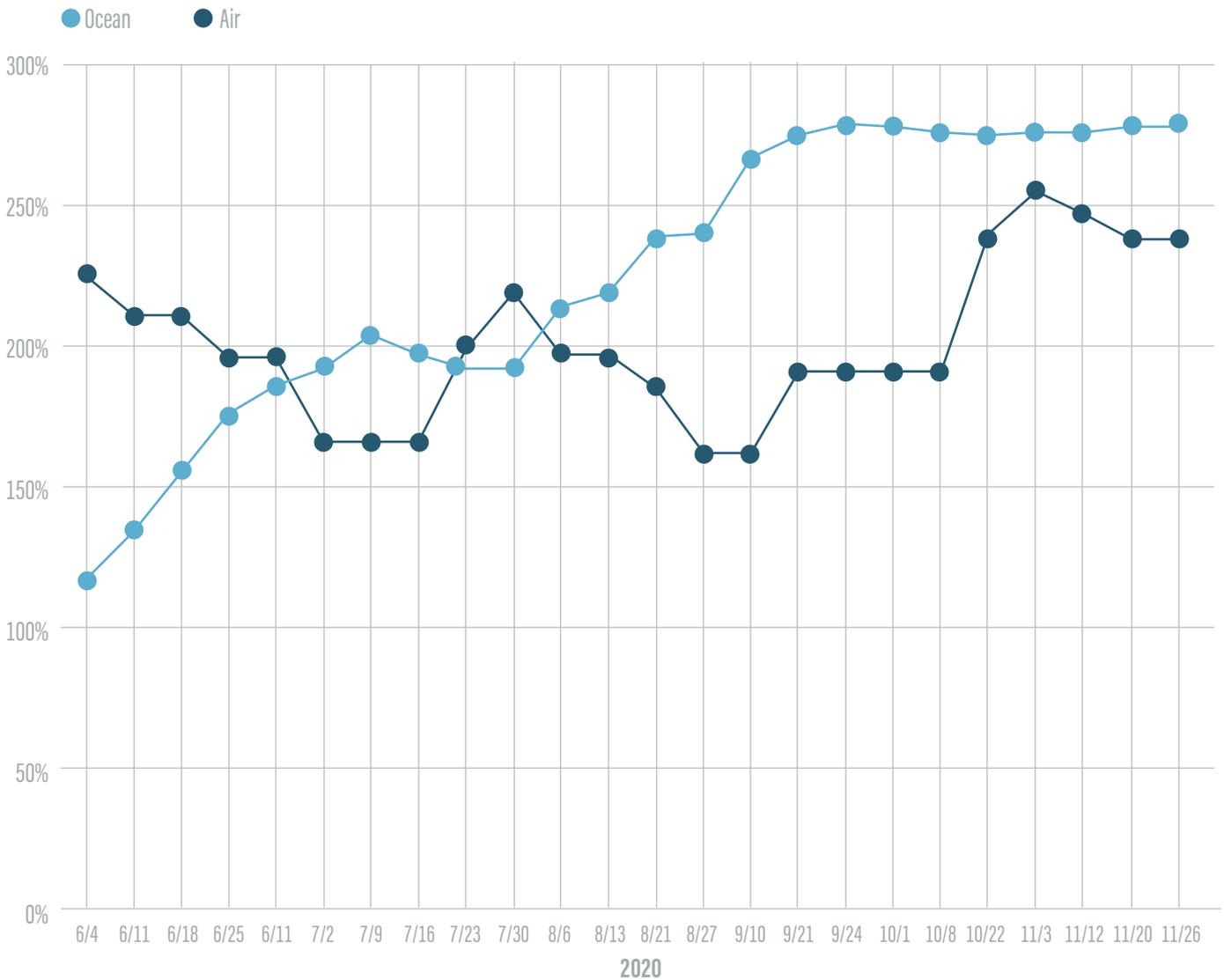
For many online merchants the problem today is not so much getting the goods produced—considering factories in China are largely back to normal—as getting them delivered without delays and hefty add-on fees. The disruption of factories in China and other countries that began

early in 2020 has had a ripple effect that’s still impacting transportation.

Airlines canceled most international flights in the early months of the coronavirus crisis, sending air freight prices up 400% in the spring,

SUPPLY CHAIN FREIGHT DISRUPTIONS

China-U.S. (West Coast) air and ocean rates, as percentage of air and ocean rates at start of 2020



Source: Freightos

says Eytan Buchman, chief marketing officer for Freightos, an online service that some 10,000 companies use to compare freight rates and book shipments. Once factories in China and elsewhere resumed production in the spring there was a surge in demand for space in containers that ship via sea, resulting in ocean freight prices in September 2020 that were three times higher on average than they were a year earlier, Buchman says.

Plus, the Chinese factories that produce goods for ChristmasCentral.com kept missing their deadlines for delivering goods to dockside, leading Gordon Industries to pay \$300,000 in extra fees to get the merchandise on later ships, Gordon says.

And even when the ships arrive in the U.S., there are delays in offloading the merchandise. For Southern California-based apparel retailer Richer Poorer, it's often taking two weeks to get a container of goods out of the Port of Long Beach, one of the nation's largest, whereas it normally would take a few days, says Tim Morse, co-founder and president.

200

The minimum order quantity required for a Los Angeles factory for Richer Poorer, compared with 2,500 minimum unit quantity for overseas manufacturers.

Source: Richer Poorer



Tim Morse,
president and
co-founder, Richer
Poorer

“You can see your container,” Morse says. “They just don’t have the manpower to keep up with demand.”

Social distancing slows U.S. production

Even domestic production was impacted by the virus. Vinyl Me, Please, a record-of-the-month club that produces its own vinyl records, encountered an issue in June when a manufacturing plant it uses in Kansas was unable to assemble records for shipment because of social-distancing requirements for workers. That includes inserting the record into the jacket, adding items like liner notes and photos, and then shrink-wrapping the package for delivery to customers, says Daniel Guarino, senior director, supply chain, for the online-only retailer.

To meet its deadline for shipping to its 30,000 monthly subscribers, Vinyl Me, Please quickly shifted the assembly work to the company that warehouses and fulfills its orders, Saddle Creek Logistics Services, which was able to get the orders out in time.



'Switching right now is not so easy, and this is making everyone keenly aware of the need to have alternative suppliers.'

— Adam Greenberg, owner and president, NorthShore Care Supply

These delays and shortages are especially infuriating at a time when online shopping is booming due to the pandemic, a trend that's likely to accelerate during this holiday season. Digital Commerce 360 projects that U.S. online retail sales will increase more than 43% in November and December over the same months in 2019.

With sales up and some products in short supply, online retailers are focusing on their most important and profitable sales channels, while seeking new ways to obtain merchandise to sell. Looking ahead, they are exploring options for sourcing goods closer to home, though some say it's hard to match the enormous manufacturing and transportation infrastructure in place in China and other Asian nations.

Retailers cut back on lower-margin online channels

Unable to keep up with orders, Gordon Industries stopped all its online advertising for ChristmasCentral.com and PoolCentral.com in early November, Gordon says. "Know what

happened? We got more business. I've never seen anything like this," he says.

GiftsForYouNow.com is throttling back sales on deal sites that take a commission and stopped offering coupons in Sunday newspaper supplements, a customer-acquisition tactic the online retailer has employed for 20 years, says Jim Tuchler, president, Techny Advisors LLC, parent company of GiftsForYouNow.com.

While he worries that reducing the number of new customers he attracts today will hurt business in the future, Tuchler says those promotional tactics are "not profitable in a world of limited capacity, so we're choosing not to do that this year."

NorthShore Care Supply also has cut back on discounting as it's struggled to obtain the high-absorbent adult diapers and cleansing wipes that are among its core products, says owner and president Adam Greenberg. The problem is that materials used in those products are also needed for personal protective equipment such as gowns and masks, making it hard for NorthShore to get

its orders filled in a year when online orders are up 20%, Greenberg says.

In response, NorthShore now only offers discounts when it has ample inventory of key items, such as earlier this month when it offered 10% off on three popular items after receiving a shipment of those products. "We wanted to encourage customers to stock up while supply is good," Greenberg says.

He has doubled his safety-stock level to hold 40 days' worth of expected sales versus 20 days normally and started ordering larger quantities of goods to make sure he can fill customers' orders, especially for those who sign up for his automatic replenishment service. He says many of those deliveries go to individuals with conditions such as Alzheimer's, spina bifida, diabetes and kidney disease.

"Our customers can't afford to run out of these supplies, as these are essential medical items," he says. "We want to put customers at ease and let them know our stock levels are high."

To ensure he has sufficient product to fulfill subscription orders on NorthShore.com, Greenberg says he has cut back on the inventory he allocates to sell on Amazon.com, where the e-retailer has sold since 2003. He says his Amazon sales are not up as much this year as sales on his own site, "merely because we didn't have enough supply to supply our own site and Amazon."

Searching for new suppliers is tough in a pandemic

Finding new suppliers is not easy, Greenberg says, because he has specific requirements for his high-absorbency diapers and a new factory would take months to retool machines to meet his needs. Plus, with products like these in short supply because of the pandemic, he knows manufacturers are limiting the amount they ship to buyers and giving priority to existing customers.

"Switching right now is not so easy, and this is making everyone keenly aware of the need to have alternative suppliers," Greenberg says.

NorthShore buys from about a dozen factories in Europe and China, and Greenberg says he's likely to buy more from China in the future because factories there are promising to make the higher-quality merchandise the retailer has been seeking.

"We've been able to find factories in China that are able to produce to specs that are not

24%

The percent of surveyed U.S. companies that were planning to or had begun to bring operations back to the U.S.



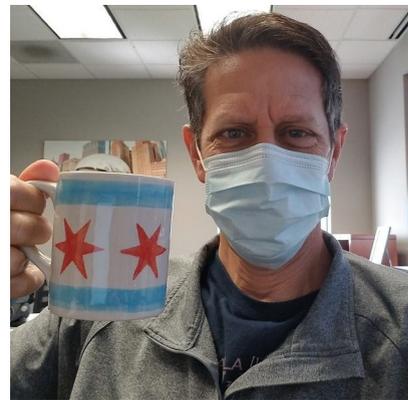
Source: Institute For Supply Management survey

available in the U.S. or Europe,” Greenberg says. “Chinese factories are working with us to develop specs to higher standards that will allow us to launch products consumers have been asking for and are not readily available in the market, giving us a first-mover advantage.”

Gordon says he investigated the possibility of manufacturing products like Christmas lights in the Buffalo area where his company is located, even meeting with the U.S. Small Business Administration last year to discuss finding a tax-advantaged enterprise zone in the region for such a factory.

But, he says, the economics of U.S. production don't work well for seasonal products, as the factory would have to produce merchandise months in advance and wait until November and December for revenue to come in. He says it would be hard to find a bank willing to lend him money to produce early in the year when he wouldn't get paid until the fourth quarter.

Tuchler of GiftsForYouNow.com says he doubts he could find suppliers in North America who could meet his needs for a constant stream of new, giftable items. “I can call a manufacturing agent in China and say I'd like to make a, fill in the blank, a cheese wheel or a doll wearing a skirt, and they'll say, 'I have a network of factories that are made for this kind of piecemeal production. I will get you a quote and send you a sample.'”



Jim Tuchler, president, Techny Advisors LLC, parent company of GiftsForYouNow.com

“I don't know how to do that in the U.S. and Mexico. In China, it's really easy. It's remote, but well set up,” Tuchler says.

Domestic manufacturers may be better for smaller quantities

Morse of casual apparel brand Richer Poorer says he is investigating the possibility of producing some garments in Los Angeles, but that he would have to sell them directly to consumers via Richer-Poorer.com and not to wholesale customers. That's because it's twice as expensive to manufacture his products in the U.S. versus overseas, and at least one-and-a-half times more even when factoring in shipping and other costs associated with doing business with suppliers many time zones away.

When he sells directly to consumers he doesn't have to offer the roughly 50% wholesale discount he gives retailers who resell Richer Poorer T-shirts, socks and sweatshirts. That would allow him to make a profit on



domestically produced items. “The margins work for direct to consumer, but they don’t work for wholesale,” Morse says.

One advantage of local production: he says the minimum order quantity required by LA factories is only 200 to 400 units per style and color versus 2,500 to 3,000 units for overseas manufacturers.

Even with the disruptions caused by COVID-19, most U.S. companies, like the online retailers interviewed for this article, are not ready to dismantle their far-flung supply chains. The

Institute For Supply Management survey found that only 24% of U.S. companies surveyed were planning to or had begun to bring operations back to the U.S. or nearby countries and that 56% definitely did not plan to do so.

One silver lining of the coronavirus pandemic is that, even if they continue to source from abroad, online retailers and other companies now have the experience of having to quickly adapt to a massive supply chain disruption. That may make the next disruption of this scale, should it occur, at least psychologically easier to manage.

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HOME FOR THE HOLIDAYS: A CURBSIDE SHOPPING EXPERIENCE

Retailers that don't execute curbside well will be challenged to compete in today's omnichannel environment. And some will never get a second chance. Retailers should keep in mind communication, signage, speed and consistency, factoring in all the details that make for a successful curbside holiday.

By Lauren Freedman

According to Digital Commerce 360's Top 500, 19—or 6.9%—retailers with stores were offering curbside pickup pre-pandemic. By August, 121, or 43.7%, of Top 500 retailers with stores offered curbside pickup. This is an impressive number,

particularly as the increases came in a short time span.

My goal was to make 10 purchases over the Cyber 5 weekend and complete the pickups



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during that same time frame for the following retailers:

- Best Buy
- Crate & Barrel
- Dick's Sporting Goods
- Gap
- Kohl's
- Macy's
- Nordstrom
- Target
- Ulta
- Williams-Sonoma

While seeing the results from the test in aggregate is always interesting, the things that happened (positive and negative) as I placed my orders and picked them up using curbside pickup during the Cyber 5 weekend are most instructive. After all, it is the holidays and in the spirit of the season, I thought I would assume the role of one of Santa's helpers.

I completed nine of these and have some advice for the retailers to ensure customers continue to adopt curbside. I have no doubt they will, but this list of recommendations will even serve them better in that process.

The details count

As I conducted these curbside pickups in a short time frame, one of the things that stood out for

me was that many retailers had well thought through all the things that would happen in this process. That began with the on-site experience and stock status as 22% of retailers (Target and Crate & Barrel) let you know specific inventory levels, moving beyond just specifying "available." I sometimes lose confidence when .when retailers only say available, and it did not take long for the first retailer, Gap, to inform me the item I purchased was out of stock. I was happy for the coupon Gap offered instead, but knowing Gap always has promotions, it really did not offset the disappointment.

Consistency counts

One of frustrations I encountered was an inconsistency in the service proposition from one month to the next. This happened at Michaels, where I have picked up at a location near my house multiple times since the pandemic began. The site shouts curbside and, as usual, I received a text saying my order was ready for pickup. But when I arrived this time and dialed the number as I have in the past, the associate let me know curbside pickup is no longer available. Customers do not want to continually be looking up your policies but instead expect that if curbside was available last month, there would be no reason to discontinue the service, particularly given the interest and the holidays. Worst-case scenario, it's still smart to get your communication right.

If things have changed or stores are not curbside-friendly, at least extend a time-saving

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benefit, as Sephora did. I liked its confirmation messaging that included “upon arrival, notify a Beauty Advisor that you are picking up an online order. You will be first up to enter the store if there is already a line.”

Comprehensive communication is critical

Retailers, please start by alerting me that you have received my order. I also want to receive a ready-for-pickup message. Additionally, allow shoppers to opt in for text alerts, found on 89% of mystery shops we completed. This customer is likely to be on the road and mobile access is key. The smartest text opt-in asked if I was interested in also receiving promotional emails. This was a perfect marketing tool while you have their attention. For me, only Nordstrom didn't offer a text opt in, but I believe that was due to a settings feature already pre-selected in my account. Text communication was mostly used when the order was ready for pickup as the links for next steps upon arrival were often included. I did not receive ready-for-pickup texts from either Crate & Barrel or Kohl's.

RETAILER CURBSIDE COMMUNICATION OPTIONS

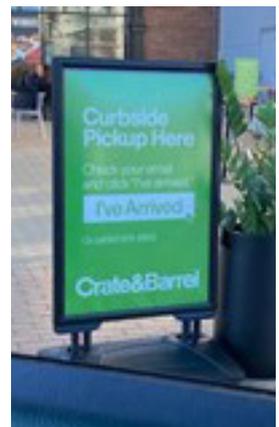
Ability to opt-in to receive text communication	89%	All retailers provided except Nordstrom
Receipt of order-email and text	22%	Only Ulta and Best Buy provided
Ready for pickup-email and text	78%	All retailers except Crate & Barrel and Kohl's

Source: Digital Commerce 360, nine curbside pickups

The app execution execution across all retailers seemed to operate on one technology. I caution retailers about making fields that the customer completes upon arrival mandatory without offering an open-ended comment field for additional information. Giving customers an out always comes in handy. Sometimes if I couldn't find a parking space, like at Kohl's, there was no way for me to let them know, so I had to come up with my own workaround.

Think customer first

Occasionally, I encountered an experience that wowed me. Crate & Barrel's app allowed me to chat with its team. While I had trouble entering my car details, I did not reach a dead end as I did with others. Instead, I was able to communicate via chat and in short order had my products ready and waiting as I made my way through the line. It took a similar approach with signage and had its phone number posted as well. Both options almost guarantee customer satisfaction and should be adopted as mainstream.



Strong signage is a confidence builder

Signage is a complex issue when it comes to curbside. There are so many types of locations and each requires just the right information. It is almost a chicken-and-egg situation, and you are

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not sure what you need until you are there and unclear where to go.



One of my initial locations for pickup was a suburban Chicago mall that I often frequent. It was a chance to pick up from three retailers. While I noticed there was mall-wide signage, it did not appear to be tied to any of the stores or communication I was

receiving. So, for me and other customers, it was everyone for themselves.



I pulled up to the front door of Macy's and saw what appeared to be a line. I figured there was no harm in letting them know I was there. I then saw that there was a green garage and that it might have parking spaces for pickup, so I figured I was getting close. In another one

of the positives I experienced, its package runner did not have a car location, so they picked up the phone, with a warm approach, to check on where I was parked. The associate was then able to quickly find me and I was back on the road.

Best Buy had some of the best signage and overall experience. While initially the entrance I used was not conducive to entering the line, I knew another entrance I could try. I joined

the line where seven cars were still in front of me. The signage and process were well done, and the line of cars appeared to be moving. I especially liked that one of the Best Buy associates even asked to confirm that I was on the list. Ultimately, my package came out in nine minutes. It appeared to be a well-oiled machine. I compliment Best Buy for its long hours as it was open the Saturday Thanksgiving week from 5 a.m.-11 p.m.



Give shoppers guidance

Lines or parking spaces are both good options, but it is all about the information. Of course, every retailer must consider the location and not all are suited for a drive-up line. So, let's start with parking spaces.

Dick's Sporting Goods did a nice job on its parking spaces. Making its phone number prominent matters. Speed was a big part of its experience as well, particularly as the associate let me know they will do more than 500 pickups on the Saturday post-Thanksgiving. When I went to return the purchase, I also found its urban location was also well signed.

Speed counts

On average, retailers were able to pick their products in 1 hour and 45 minutes. While that is

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certainly reasonable, Ulta clocked in Black Friday at eight minutes while Dick’s Sporting Goods—a relatively large store—had my purchase ready in five minutes. I would not be able to find it in the store that fast. While Target required a bar code and Ulta was firm in seeing my ID, most just asked for my name and laid the product in the car, adding to the efficiency.

The other place where speed matters most is once you arrive at the store. The average pickup time for my nine purchases was just under nine minutes. Any retailer who can deliver in five minutes or less, particularly during such a busy week, should be commended. Target, with such a large footprint and high volume, was especially impressive at three minutes. The location of the reserved drive-up spots and the proximity to the store certainly helped.

Time (in minutes) from receipt of order to ready to pick up communication

Crate & Barrel	289
Nordstrom's	186
Target	138
Kohl's	132
Williams-Sonoma	94
Macy's	53
Best Buy	42
Ulta	8
Dick's Sporting Goods	5

Source: Digital Commerce 360

It even looked better as it had alerted me that it was the busiest time of the year and patience was a must. The store is big, and it still managed to make it happen.

Much of the timing is a factor of parking spaces, volume, location and internal organization. Should any one of those fall through the cracks, timing can become problematic. That was certainly the case with Williams-Sonoma. This was a challenging experience all around.

Its mall location was not well-suited to handle curbside pickups. Its ready-for-pickup email only had a phone number and no link to say, “I’m here.”

When I called, the sales associate was frazzled, though managed to give me the location, which proved to be a loading dock. To be honest, it did not even feel like a safe location, especially



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when it was dark. When I got there, I did not even notice the Williams-Sonoma sign as it was overpowered by its sister brand Pottery Barn. I called again and gave her my name, but she was unable to find anything. I walked into the back



of the store fronts where packages were scattered everywhere, so I am not surprised she could not locate it. She then came out and I gave her my order number, while I ran back to the car.

Ultimately, she came out to deliver my package 20 minutes later. This was unacceptable.



Pickup time in minutes from arrival at location to receipt of products

Target	3
Nordstrom's	4
Dick's Sporting Goods	4
Crate & Barrel	5
Ulta	6
Macy's	8
Best Buy	9
Williams-Sonoma	20
Kohl's	21

Source: Digital Commerce 360

One thing I have learned is that if you frequent this service like I do, the second trip is always easier. You know how to use the app, where to park or pull into the line, so the anxiety and uncertainty that are part of the initial experiences are alleviated and it is mostly smooth sailing from here on out.

Those retailers that do not perform well will be challenged to compete in today's omnichannel environment. And some will never get a second chance. Retailers should keep in mind communication, signage, speed and consistency, factoring in all the details that make for a successful curbside holiday. We can almost guarantee that curbside will remain important in 2021, so now is the perfect time to get it right.

HOW AMAZON PRIME DAY AFFECTS THE HOLIDAY SEASON

The delayed Prime Day was so close to the holiday shopping season this year that it gave us a peek into how consumers will shop during the Cyber 5. Here are two key insights.

By Fareeha Ali

Amazon.com Inc. postponed its annual Prime Day sales event from its usual July time slot to October—just a month-and-a-half before Black Friday and Cyber Monday. Therefore, it served as an indicator of how consumers might shop during the holiday season.

Sales of marketplace sellers' products grew nearly 60% year over year to more than \$4.8 billion worldwide during the four-day period from Black Friday through Cyber Monday, Amazon reports. Comparatively, marketplace sellers sold more than \$3.5 billion worth of goods during the two-day Prime Day event (Oct. 13-14), a similar 60% increase from the 2019 Prime Day event.

Here's what we learned from Prime Day about the 2020 holiday season.



Fareeha Ali, Digital Commerce 360 research and editorial director

Consumers will shop with more merchants than just Amazon this year.

It's likely Amazon.com Inc. will lose a share of total online traffic during the full holiday season. On Prime Day, for example, shoppers browsed more websites than just Amazon this year—more so than in previous years.

A Digital Commerce 360 analysis of SimilarWeb website traffic data to the top 100 North

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American retail sites during Oct. 13-14 (Prime Day 2020) showed Amazon accounted for a smaller share of total traffic than 2019. This year, traffic to Amazon.com represented 40.6% of total traffic to the top 100 sites during the two-day period, down from 49.3% during Prime Day 2019 (July 15-16, 2019). That means consumers are starting to see Prime Day as a sales event for more retailers than just Amazon. It also means retailers not named Amazon gained more online customers this year and Amazon may not be the only winner this holiday season.

What's more, Digital Commerce 360's new research on how the U.S. ecommerce market performed in 2020 showed a similar pattern. Digital Commerce 360 estimates Amazon represents nearly a third (32%) of all U.S. ecommerce growth in 2020. That's a significant

share, but it's down from nearly 44% in 2019. It's clear that while the pandemic pushed many more consumers online, they're not all going to Amazon. At least some are shopping on other large online retail sites—and will do so for their holiday shopping this year too.

For example, Walmart Inc.'s ecommerce sales were up 100% year over year on Black Friday and 57% on Cyber Monday, according to estimates from marketplace technology company Jungle Scout. Online marketplace for handcrafted goods Etsy Inc. doubled its gross merchandise sales 115% year over year during Cyber 5, according to estimates from digital commerce intelligence company Edison Trends. Etsy was the biggest grower, growing nearly four times the 30% growth for second-place Amazon, according to Edison.



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Holiday sales won't be as concentrated during Cyber 5 as in previous years.

Amazon began promoting Prime Day deals before the event even began. For example, by Oct. 9—four days before Prime Day started—it had “early Prime Day deals” listed on its homepage. This is similar to the “early” or “all month long” Black Friday deals many large retail sites have been promoting all November, and even in October.

What's more, shoppers purchased deals during the days leading up to Prime Day, says Brian Lim, CEO and co-founder of apparel brands Into the AM and iHeartRaves.

“Regarding our Amazon store, we had a lot of success with our video campaigns this year, which resulted in a 38% increase in ad revenue. Also, Prime Member exclusive discounts performed better than regular coupons,” he says. “Our early promotions performed well because customers are shopping earlier than in previous years. Buyers were clipping coupons up to days before the event.”

51%

The percentage of Top 100 retailers that offered widespread promotions to compete with Amazon on Prime Day.

Source: Digital Commerce 360 site visits

It's likely consumers have been shopping Black Friday deals throughout the month on both Amazon and other retail sites, and revenue will be more spread out over November and December than it has been in previous years. Digital Commerce 360 estimates 19.2% of holiday ecommerce sales will occur during Cyber 5 (the five days starting Thanksgiving and ending the following Monday). That's down from 20.4% last year.

Early results of Cyber 5 and full-month November sales show spending has been spread out this year more so than past years. For one, many retailers offered their Black Friday/Cyber Monday deals even before Thanksgiving. By Nov. 23, 78% of top 50 online retail sites—including Amazon—were offering some Black Friday/Cyber Monday discount, according to Digital Commerce 360's analysis. By Cyber Monday, 88% of the 50 retailers offered holiday promotions.

In a typical year, the holiday shopping season is concentrated during November and December. This year, however, more holiday spending occurred in October thanks to Prime Day. On Oct. 13, 51% of the top 100 retailers offered widespread promotions to compete with Amazon on Prime Day. And 24% promoted holiday shopping on their sites.

“Prime Day's timing in October positively impacted overall holiday shopping trends. It kicked off the holiday shopping season for our

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brands,” says Stephanie Fox, chief operating officer at Thrasio, a consultancy that works with more than 100 brands selling on Amazon. “Sales and engagement with our deals have been high ever since. There was less urgency to make purchases on just Cyber Monday, so sales have been more spread out.”

Based on data from marketplace technology vendor ChannelAdvisor Corp., sales of its retailer clients on several marketplaces grew 47.0% year over year in October and 54.4% in

November. More significant: ChannelAdvisor’s data shows the strongest year-over-year growth in GMV was during the three days preceding Thanksgiving. The company did not provide specific growth rates.

Similarly, data from technology vendor Salesforce shows ecommerce sales grew 72% year over year on the Tuesday before Thanksgiving and 48% on the Wednesday preceding.

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