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Holiday Marketing: Review and Wrap-up

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Mega-Trends:



Black Friday Week: Rundown

Thanksgiving Day:

\$1.93 Billion +11%

Black Friday:

\$3.34 Billion +21% (Mobile: \$1.2 Billion) +33%

CyberMonday

\$3.39 Billion +10%

Source: MediaPost

Black Friday Week: UK

Black Friday - CyberMonday:

£2.85 Billion +38%



65% Shop that weekend
because of discounts

Source: PriceWaterhouseCoopers/Opinium Research LLP

Over \$1 Billion in Revenue 57 out of 61 Days



Source: CMO/Adobe

Don't Discount the Desktop!

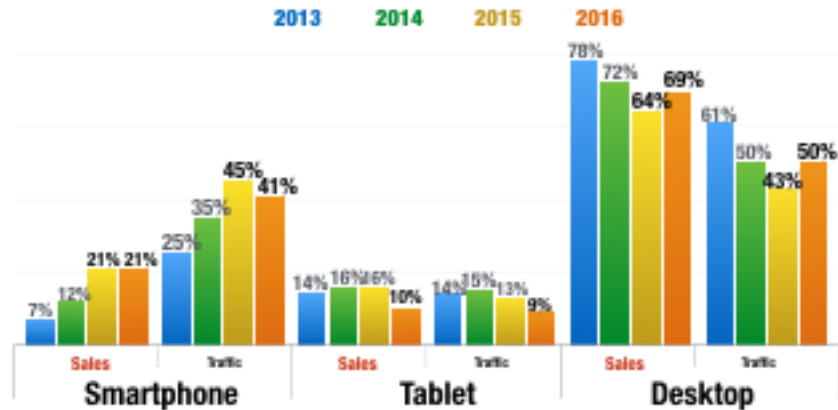
Purchasing from desktop computers topped \$1 billion for 19 straight days

Desktop ecommerce spending between Nov. 1 and Dec. 12 jumped 12% to \$49.3 billion



Source: MediaPost/Adobe

Share of Traffic & Sales:



Source: CMO/Adobe

Channel Analysis:

Conversion Rates by Device:

1. Desktop 5.5%
2. Tablets 4.6%
3. Smartphones 2.4%

Source: MediaPost/Adobe

Channel Analysis:

Traffic

1. Organic Search
2. Search Ads
3. Direct (25.3%)
4. Email (15%)

Sales

1. Search (40%)
2. Direct (28%)
3. Email (17.8%)
4. Display (1.2%)
5. Social (0.9%)

Source: MediaPost/Adobe

Channel Analysis:

Best Performing Channel 2016

1. Organic Search

"Organic Search will be the top priority of marketing executives in 2017"

"Over 80% of marketing execs are increasing...digital advertising, content marketing and SEO in 2017."

-comScore

Source: comScore report

Email:

1 of every 5 sales
on CyberMonday

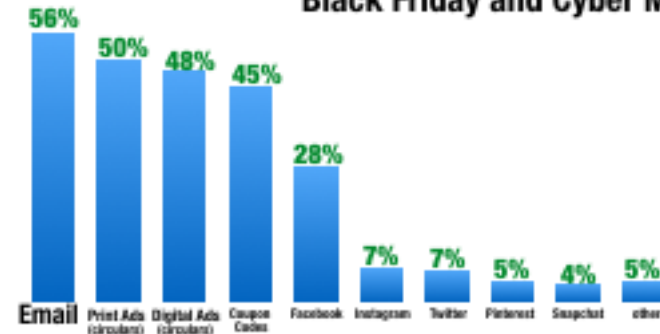
20%

Up 33%
from 2015



Email:

Most Influential Advertising Media:
Black Friday and Cyber Monday



Source: JDA

Email:

opens on **mobile** generating
50% revenue compared to
desktop opens

73% email opens in retail
are mobile (60% all opens)



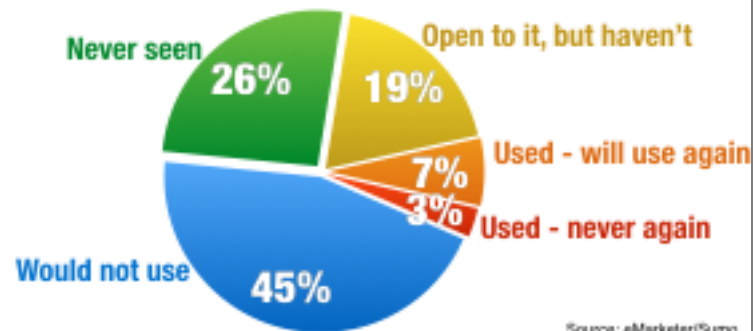
The Big Loser:

Social Network "Buy" buttons



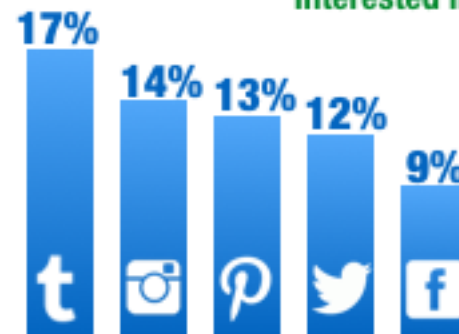
The Big Loser:

Have you tried Social Commerce?



Uh-oh:

Global Social Media Users Interested in the "Social Buy" Button



40% of companies
using Social Buy
buttons will cut
back after this
holiday season.

Source: Business Intelligence
Source: MediaPost EU

But not Everywhere!

SouthEast Asia

30%

of digital sales
are from Social
Commerce



Source: eMarketer

“Out on a Limb” Award:



REI Shocks Retail World By Closing For Black Friday ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - REI, the Seattle-based outdoor recreation and sporting goods giant ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI Will Shut Consumers Out on Black Friday - Creativity ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - REI is making its move on Black Friday ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI Will Be Closed on Black Friday and Pay Its 10,000 ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - A new website, reideals.com, ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI wants you to skip the Black Friday ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - REI's decision to close for Black Friday ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI Won't Open On Black Friday, Says Exec ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - The outdoor retailer ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI Cops Outside With Anti-Black Friday ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - REI's decision to close for Black Friday ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

REI closing on Black Friday for 1st time in ...
www.rei.com - REI's decision to close for Black Friday ...
Oct 21, 2014 - REI's decision to close for Black Friday ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...
Black Friday Closing For Black Friday, Facing 10,000 Employees in One Day ...

26%
Increase

Black Friday
e-commerce
traffic

Trended
#0gtOutside



Observation 1:



Black Friday is now Q4

Consumers are browsing and buying
long before Black Friday

54% of shoppers expect holiday promotions
to begin by October *or earlier*.

85% expect deals before Black Friday.



Source: RetailMeNot, Annual Holiday Insights Guide

Analysis:

Less Emphasis on Black Friday CyberMonday



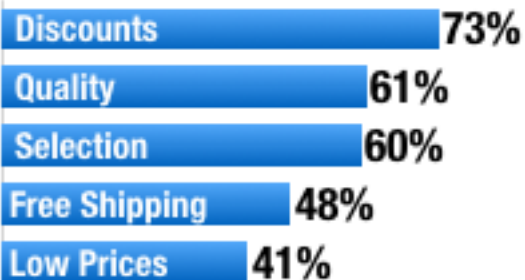
22% of Amazon's TV ad spots between November 23-27 actually mentioned "Black Friday"
Only 19% of its TV ads between November 27-30 mentioned "Cyber Monday."

Observation 2:



Sales Cut Profits

Factors that Influence Holiday Purchases:



Source: National Retail Federation; 2016 Holiday Consumer Spending Survey

Someone has to pay:



Overall holiday
spending rose by 4%

Retailers are expecting
to see holiday quarter
profit decline 1.9%

Source: Retail Metrics

"Total holiday sales rose 3.8%
Overall holiday spending rose by 4%
(biggest growth since 2011). However,
"consumer's heightened expectations
of cheap or free shipping acted as a
further damper on margins.""

- Conlumino (Retail Consulting Firm)

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