



Ecommerce Quarterly Benchmarks

Trends & Behaviors In The COVID Era

Q2 2020

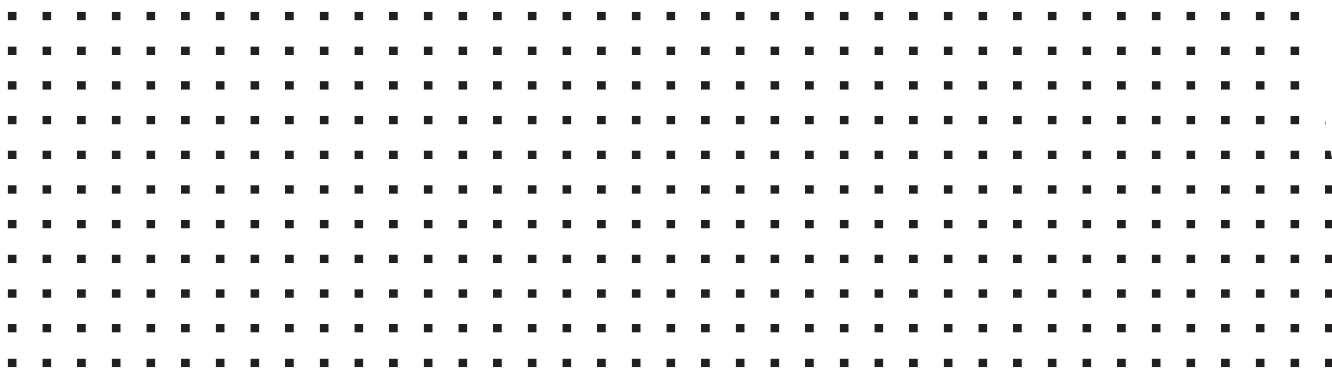
INTRODUCTION

Our quarterly ecommerce benchmark report includes average order value and conversion rates by device, source channel, and more. To produce this proprietary data, we analyzed billions of customer sessions across 250+ retailer brands.



BENCHMARKS

Website Visits	4
Average Page Views	7
Conversion Rate	11
Average Order Value	15



SUMMARY

A look at billions of customer sessions makes clear what we already knew:

COVID shifted shopping trends and behaviors considerably.

We're seeing some of that impact on browsing behavior with almost half of sessions in the United States coming from desktop. Meanwhile, users in the United Kingdom are increasingly using their mobile devices to browse, with 75% of sessions coming from mobile. With more time on their hands, users are also registering more onsite activity: page views are up in the U.K. almost a quarter (from 9.18 in Q2 2019 to 11.13 in Q2 of this year, or 21.24%).

Meanwhile, conversion rates are up when compared to [Q1 of this year](#), highlighting the shift to online due to lockdown measures across the globe. (It should be noted that when compared to last year, however, conversion rates have taken a hit). As users are in browse mode, retailers and brands should be leveraging what they know about their visitors to deliver superior personalized experiences, using AI to help scale and maximize ROI. Monetate customers who have been leveraging this functionality throughout Q2 have seen a significant increase in conversion rate.

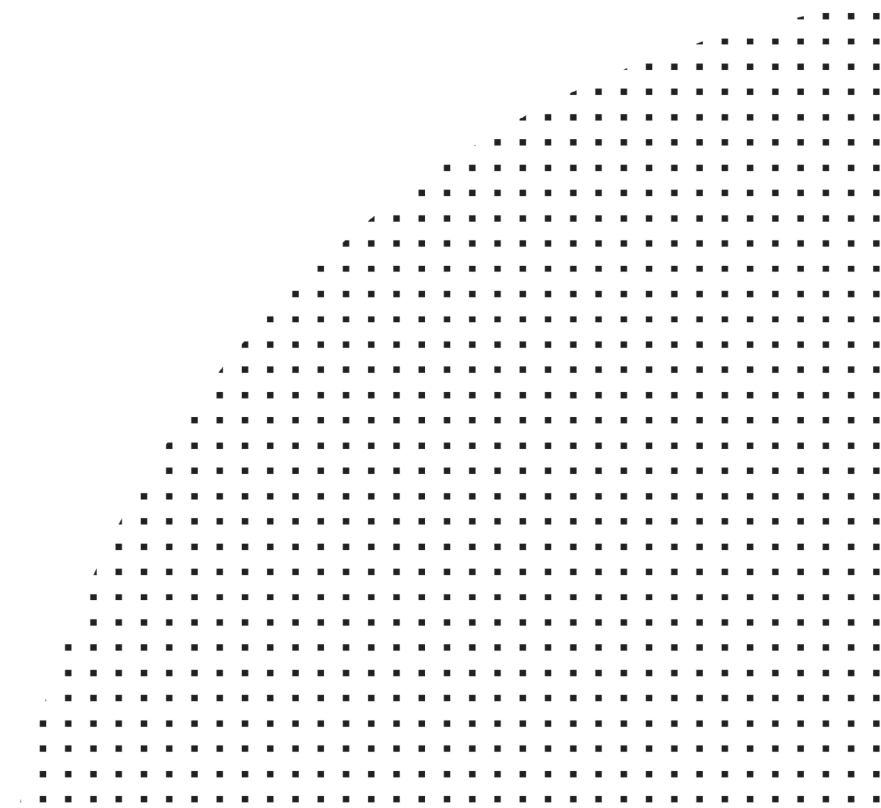
[Kibo holiday research](#), for instance, shows that the segment of shoppers that were new holiday customers the year before are likely to spend more this holiday season when they return when compared to newly returning shoppers.

With users more likely to be shopping across multiple devices, you'll need to make sure that you're able to recognize customers as they switch to deliver a consistent and personalized experience.

On the AOV front, we're seeing declines due to deeper discounts and longer running promotions.

Looking ahead to Q3 and Q4, retailers and brands should be accelerating their personalization programs and leveraging merchandising functionality such as product recommendations to increase RPS and AOV, whilst using optimization tactics for up-selling and cross-selling.

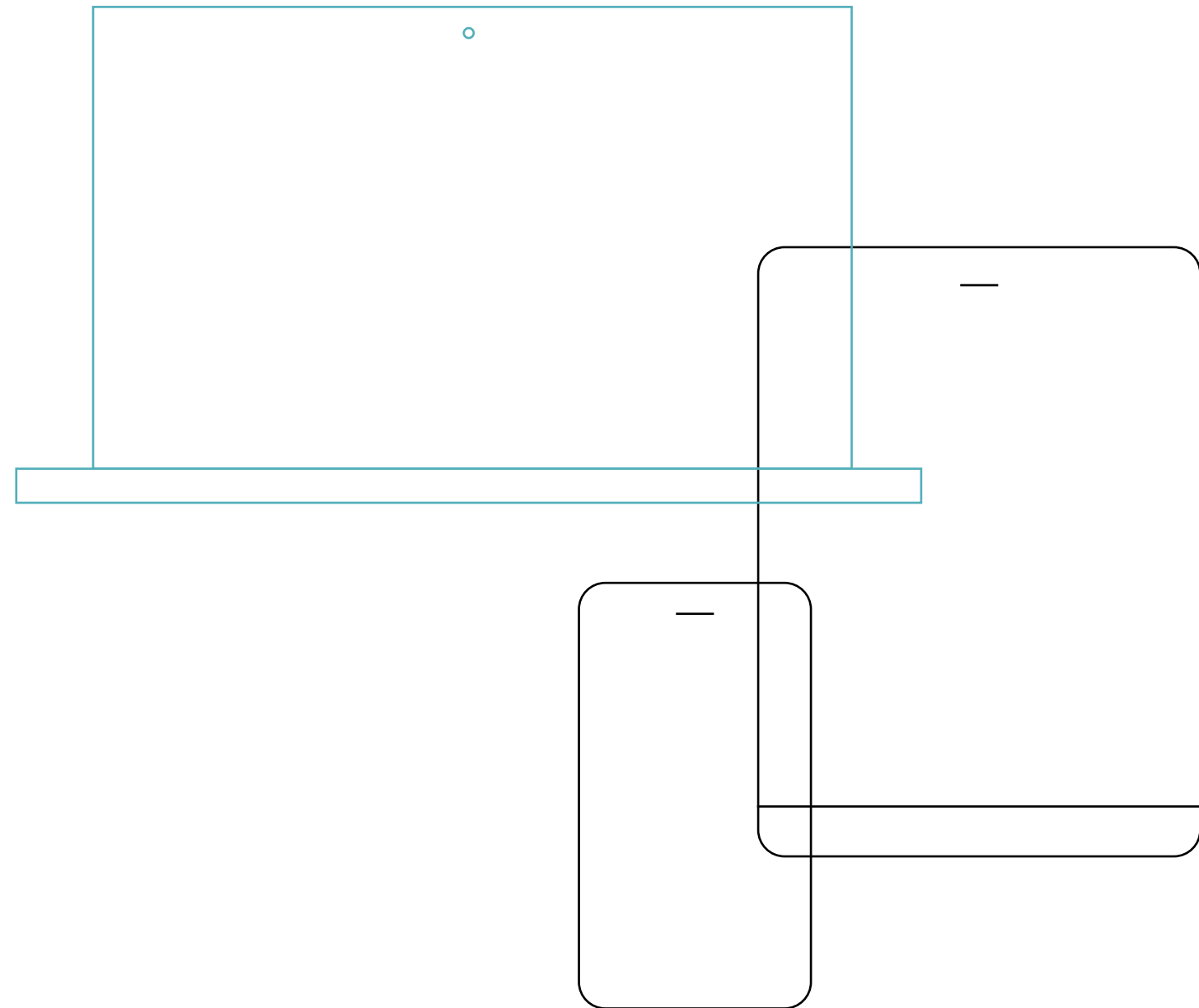
Even better, if retailers can stand up a personalization program as part of a larger [unified approach to commerce](#), they can drive the kind of business goals needed to make up for a lackluster year.



WEBSITE VISITS TRENDS & BEHAVIORS

Visits from desktop accounted for almost half of sessions in the United States. WFH life has likely led to this shift in behavior. In contrast, tablet use now accounts for only 3% of total sessions—the decline is a trend we’ve seen increase further each quarter since Q2 of 2010!

Interestingly, this change in desktop behavior was not seen in the U.K., however. Mobile traffic accounted for 75% of sessions in Q2 2020 there—a 10% increase when compared to last year, and a 3% increase when compared to Q1 2020.



WEBSITE VISITS

Website Visits By Device		Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	Desktop	31.12%	30.12%	32.31%	38.22%	40.60%
Global	Mobile Phone	60.19%	60.06%	61.61%	56.44%	55.08%
Global	Other	1.00%	3.00%	0.93%	1.41%	0.93%
Global	Tablet	7.69%	6.81%	5.15%	3.93%	3.39%
US	Desktop	34.68%	33.64%	36.78%	44.62%	48.67%
US	Mobile Phone	57.01%	55.84%	57.69%	50.58%	47.67%
US	Other	0.62%	3.78%	0.65%	1.26%	0.79%
US	Tablet	7.69%	6.74%	4.88%	3.54%	2.87%
GB	Desktop	21.51%	20.25%	19.52%	21.16%	19.31%
GB	Mobile Phone	68.07%	70.08%	72.93%	72.36%	74.66%
GB	Other	0.09%	0.09%	0.08%	0.15%	0.21%
GB	Tablet	10.32%	9.58%	7.47%	6.33%	5.81%

Website Visits by Operating System

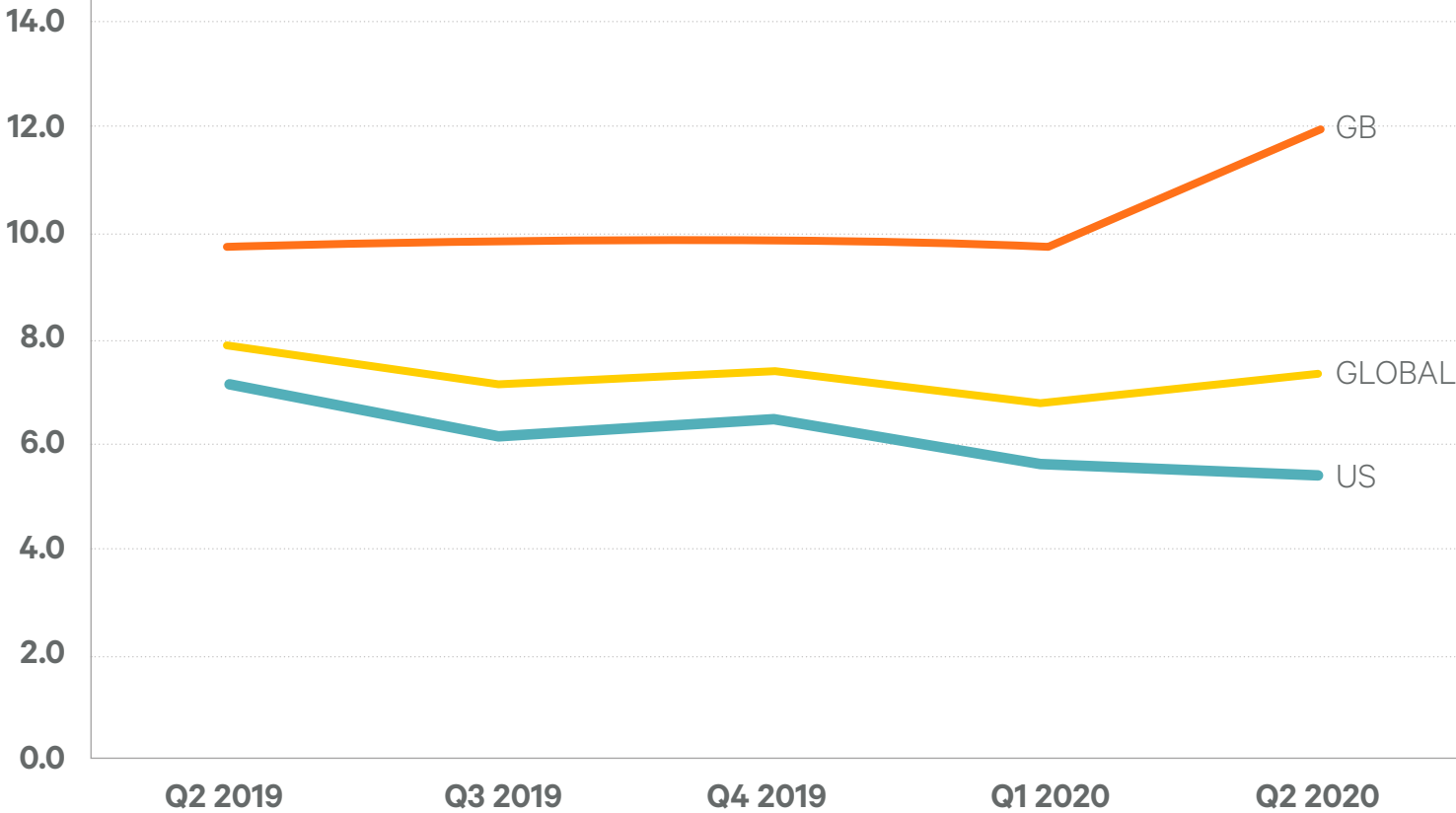
	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Android	21.31%	21.25%	21.10%	19.69%	18.56%
Chrome OS	0.58%	0.49%	0.56%	0.54%	0.55%
Linux	2.12%	2.50%	3.21%	4.44%	2.47%
Macintosh	8.26%	7.91%	10.09%	13.53%	13.66%
Windows	20.05%	19.06%	18.28%	19.53%	23.73%
Windows Phone	0.02%	0.02%	0.02%	0.01%	0.01%
iOS	46.58%	45.64%	45.67%	40.71%	40.01%

PAGE VIEWS TRENDS & BEHAVIORS

Users in the U.K. are browsing more, seeing a 24% uplift in page views compared to last year (9.18) and last quarter (8.97). We typically see users in the U.K. browsing 10 pages in one session, but in Q2 2020, we saw a noticeable boost, with average page views reaching 12 per session.

In the U.S., we saw 24% less page views per session. With an average of 6.2 page views over the last 12 months, Q2 saw average page views of 5.4 in one session.

PAGE VIEWS BY REGION



AVERAGE PAGE VIEWS

Average Page Views by Device		Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	Desktop	8.61	7.46	7.71	6.32	6.13
Global	Mobile Phone	7.28	6.87	7.11	7.02	8.03
Global	Other	3.09	1.64	2.61	1.99	2.56
Global	Tablet	9.29	8.90	8.82	8.54	9.28
US	Desktop	8.10	6.74	6.92	5.29	4.64
US	Mobile Phone	6.30	5.87	6.03	5.91	6.10
US	Other	5.81	1.72	4.15	2.38	3.16
US	Tablet	8.77	8.17	8.21	7.63	7.73
GB	Desktop	10.92	10.81	11.68	11.98	15.29
GB	Mobile Phone	9.18	9.36	9.28	8.97	11.13
GB	Other	8.19	7.58	7.31	7.60	7.11
GB	Tablet	10.48	10.70	10.02	10.24	11.99

Average Page Views by Operating System

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Android	7.61	7.06	7.53	7.44	8.82
Chrome OS	10.42	10.19	9.91	9.72	11.02
Linux	3.04	2.44	2.02	1.83	1.75
Macintosh	8.84	7.96	8.42	6.44	7.05
Windows	9.08	7.88	8.27	7.18	5.94
Windows Phone	6.86	6.31	5.44	5.07	5.56
iOS	7.46	7.09	7.11	6.96	7.76

Average Page Views by Region

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	7.80	7.03	7.35	6.74	7.25
US	7.11	6.16	6.45	5.65	5.42
GB	9.68	9.78	9.80	9.68	11.97

CONVERSION RATE TRENDS & BEHAVIOR

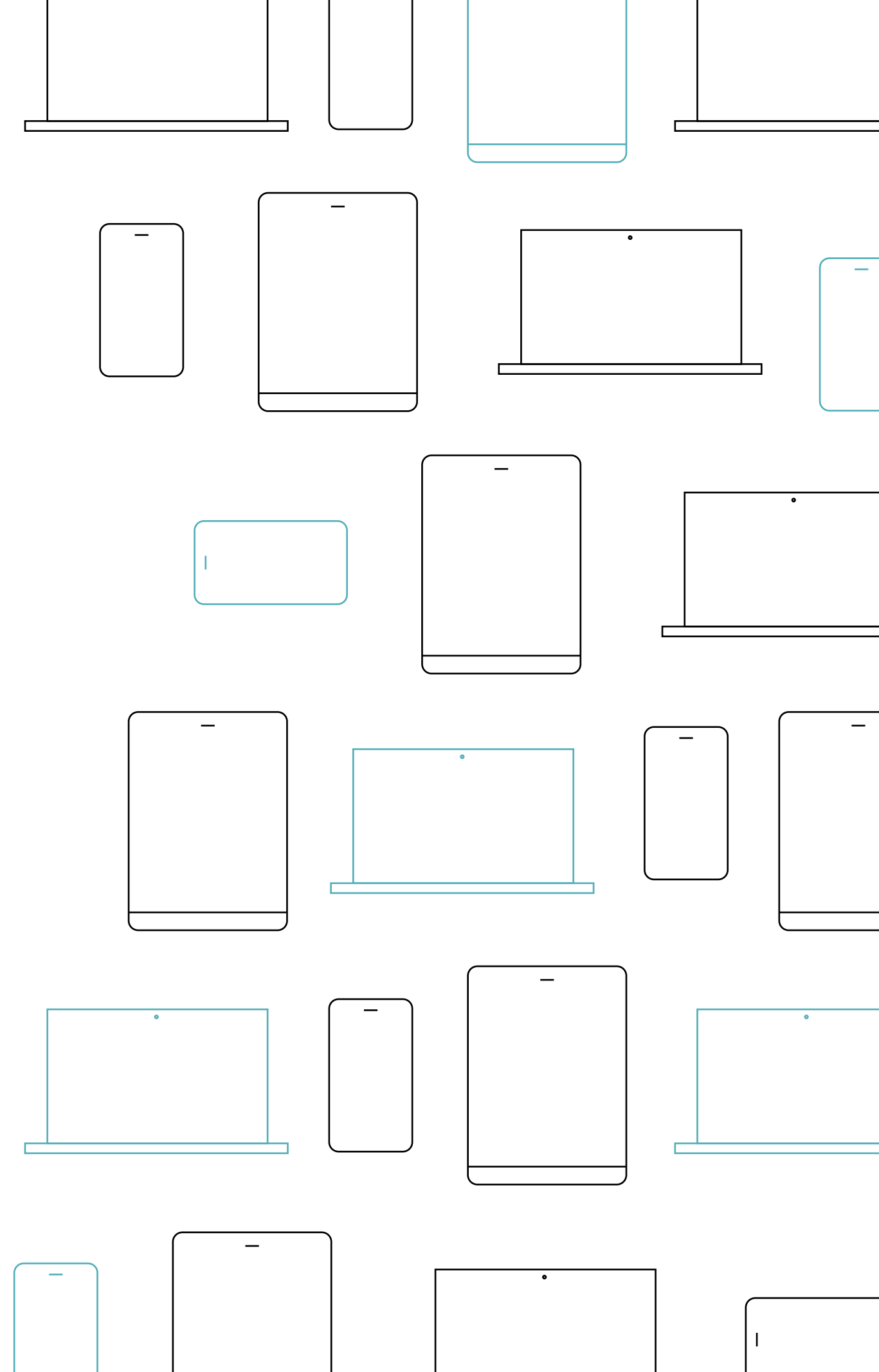
As detailed earlier in the report, conversion rates are up almost across the board, highlighting the shift to online since Q1 2020 due to sheltering-in-place protocols.

To reiterate further, compared to last year, conversion rates have slid as a result of the pandemic.

As noted earlier, though desktop sessions accounted for almost half of all sessions in the U.S., this increase in desktop browsing is not reflected in the documented conversion rates. Conversion rate is down 49% versus last year. Not only did user intent change when visiting a website in Q2 but out-of-stock products were potentially a cause for this marked decline, too.

On the other hand, mobile conversion rate in the U.S. was up 31% year-over-year. To maximize this trend, retailers and brands should make sure their website is completely optimized for mobile and figure out how to keep users on-site and converting, even if inventory is an issue.

In the U.K., although sessions were up massively across mobile, conversion rate was ultimately down 11% against last year and 6% compared to Q1 2020.



CONVERSION RATE

Conversion Rate by Device		Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	Desktop	3.90%	3.48%	3.65%	2.55%	2.38%
Global	Mobile Phone	1.82%	1.79%	2.06%	1.84%	2.12%
Global	Other	0.06%	0.21%	0.18%	0.12%	0.14%
Global	Tablet	3.49%	3.56%	3.72%	3.16%	3.48%
US	Desktop	4.14%	3.56%	3.72%	2.43%	2.10%
US	Mobile Phone	1.53%	1.51%	1.85%	1.61%	2.01%
US	Other	0.05%	0.25%	0.34%	0.19%	0.21%
US	Tablet	3.36%	3.48%	3.80%	3.12%	3.32%
GB	Desktop	4.97%	5.01%	5.11%	4.14%	5.30%
GB	Mobile Phone	3.35%	3.47%	3.44%	3.15%	2.97%
GB	Other	1.34%	1.33%	1.09%	0.40%	0.34%
GB	Tablet	4.48%	4.53%	4.23%	3.64%	4.22%

Conversion Rate by Operating System

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Android	1.81%	1.76%	2.12%	1.86%	2.23%
Chrome OS	3.01%	3.43%	3.54%	2.92%	3.76%
Linux	0.41%	0.28%	0.15%	0.09%	0.13%
Macintosh	3.67%	3.36%	3.55%	2.26%	2.59%
Windows	4.41%	3.98%	4.36%	3.32%	2.46%
Windows Phone	1.14%	1.07%	0.85%	0.66%	0.64%
iOS	2.11%	2.07%	2.22%	1.96%	2.19%

Conversion Rate by Region

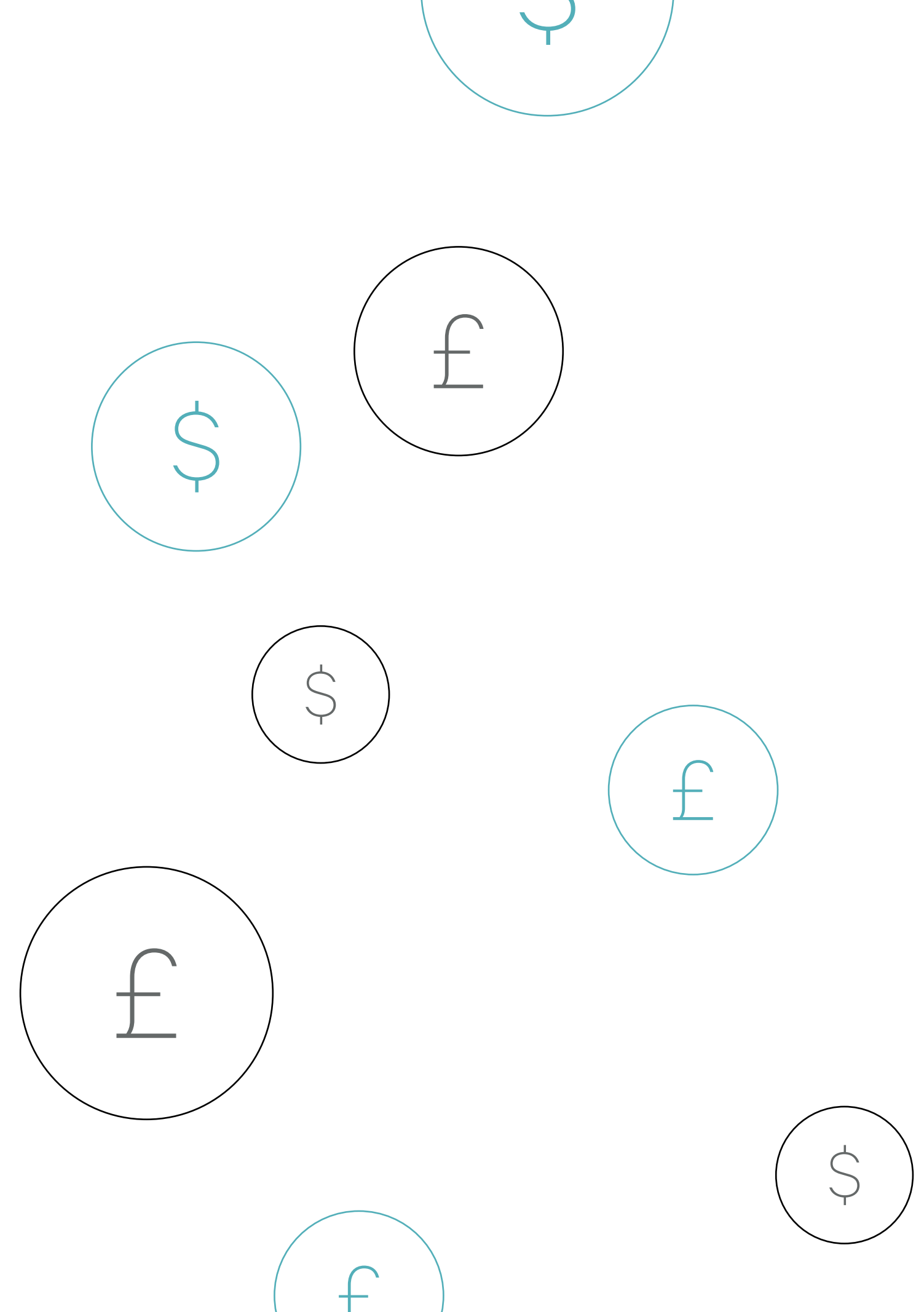
	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	2.58%	2.37%	2.64%	2.14%	2.25%
US	2.57%	2.28%	2.62%	2.01%	2.08%
GB	3.81%	3.88%	3.83%	3.39%	3.49%

AVERAGE ORDER VALUE TRENDS & BEHAVIORS

Overall, AOV has suffered in Q2 2020 compared to the same quarter last year. The U.S. has seen the bigger decline in AOV: a 6% decrease compared to the U.K.'s 3%. This is likely due to retailers running promotions to counter the adverse effects of COVID-19 during a quarter that is traditionally a full-priced season.

Diving into device AOV, our customers in the U.K. saw no change from mobile devices year-over-year. While in the U.S., we saw mobile having the lowest AOV in the last 12 months and a 4% decline YOY.

From a channel perspective, in Q2 2020, AOV was down across Direct, Search, and Social compared to Q2 2019. Email was the exception, seeing a 1% uplift versus last year. Compared to Q1 2020, AOV from search and social were up 1% and 4% respectively.



AVERAGE ORDER VALUE

Average Order Value By Category					
	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Direct	\$112.11	\$109.43	\$109.92	\$103.87	\$100.87
Email	\$105.75	\$108.47	\$110.49	\$107.67	\$106.96
Search	\$94.85	\$91.70	\$99.61	\$92.84	\$93.65
Social	\$78.98	\$74.34	\$81.86	\$71.82	\$74.78
Unknown	\$112.38	\$104.60	\$112.86	\$106.82	\$110.64

Average Order Value by Device

		Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	Desktop	\$128.33	\$123.67	\$125.39	\$119.58	\$122.11
Global	Mobile Phone	\$86.46	\$85.51	\$92.01	\$85.53	\$84.31
Global	Other	\$80.28	\$130.26	\$46.99	\$44.15	\$67.66
Global	Tablet	\$97.20	\$94.43	\$98.83	\$86.44	\$89.11
US	Desktop	\$135.08	\$128.21	\$129.94	\$123.81	\$131.16
US	Mobile Phone	\$94.86	\$93.70	\$101.63	\$91.80	\$90.82
US	Other	\$83.15	\$132.80	\$40.36	\$39.71	\$63.72
US	Tablet	\$101.96	\$98.39	\$106.46	\$91.39	\$96.75
GB	Desktop	£87.91	£86.29	£84.70	£79.45	£83.47
GB	Mobile Phone	£63.64	£61.08	£66.60	£61.69	£63.76
GB	Other	£67.02	£81.80	£80.17	£85.57	£94.08
GB	Tablet	£80.41	£77.78	£75.75	£66.32	£72.48

Average Order Value by Operating System

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Android	\$76.19	\$77.81	\$81.75	\$75.50	\$74.99
Chrome OS	\$88.30	\$84.65	\$92.52	\$88.11	\$101.47
Linux	\$85.79	\$80.23	\$121.98	\$102.00	\$118.76
Macintosh	\$132.92	\$126.93	\$133.91	\$123.90	\$127.17
Windows	\$127.99	\$123.81	\$122.57	\$118.47	\$119.99
Windows Phone	\$66.18	\$64.64	\$68.59	\$64.44	\$70.77
iOS	\$93.60	\$90.96	\$97.89	\$90.28	\$89.42

Average Order Value by Region

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Global	\$107.51	\$103.60	\$107.81	\$101.61	\$101.04
US	\$118.18	\$112.48	\$117.04	\$109.52	\$111.27
GB	£72.57	£69.64	£72.16	£66.67	£70.25

Average Order Value by US State

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Armed Forces - America	\$163.32	\$139.04	\$150.97	\$138.99	\$138.78
Armed Forces - Europe	\$166.77	\$148.00	\$165.41	\$154.50	\$161.47
Alaska	\$146.65	\$140.58	\$147.98	\$135.32	\$128.29
Alabama	\$113.24	\$108.12	\$108.99	\$104.42	\$111.22
Armed Forces - Pacific	\$113.72	\$187.00	\$135.69	\$101.97	
Arkansas	\$119.66	\$111.41	\$113.68	\$108.36	\$113.27
Arizona	\$111.68	\$104.63	\$107.85	\$103.87	\$112.34
California	\$131.06	\$122.25	\$126.05	\$118.30	\$115.49
Colorado	\$123.97	\$120.34	\$127.93	\$115.29	\$115.81
Connecticut	\$110.87	\$106.81	\$117.33	\$107.61	\$114.69
District of Columbia	\$137.46	\$138.53	\$135.42	\$123.82	\$116.61
Delaware	\$106.77	\$103.68	\$117.38	\$103.99	\$105.87
Florida	\$118.87	\$111.74	\$116.51	\$112.18	\$116.08
Georgia	\$115.18	\$111.61	\$113.37	\$108.54	\$112.28
Hawaii	\$131.10	\$122.84	\$119.64	\$112.22	\$105.81
Iowa	\$99.95	\$96.32	\$103.37	\$94.32	\$97.94
Idaho	\$123.39	\$115.80	\$120.92	\$112.01	\$115.66
Illinois	\$117.00	\$110.38	\$115.44	\$104.91	\$102.69
Indiana	\$100.15	\$96.47	\$102.47	\$95.99	\$101.07
Kansas	\$105.11	\$99.81	\$107.24	\$98.81	\$100.98
Kentucky	\$109.78	\$105.29	\$108.54	\$101.93	\$107.92
Louisiana	\$112.81	\$107.93	\$112.26	\$105.74	\$107.08
Massachusetts	\$112.41	\$108.62	\$117.77	\$108.00	\$112.68
Maryland	\$114.14	\$109.09	\$116.23	\$108.37	\$107.24
Maine	\$104.30	\$104.78	\$110.79	\$100.19	\$108.47
Michigan	\$105.02	\$101.51	\$109.25	\$99.68	\$103.66
Minnesota	\$111.65	\$108.19	\$115.86	\$104.78	\$106.39

Average Order Value by US State cont.

	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020
Missouri	\$108.15	\$103.02	\$106.64	\$98.01	\$101.63
Mississippi	\$112.59	\$106.81	\$109.17	\$100.98	\$108.67
Montana	\$114.89	\$111.81	\$125.93	\$113.91	\$116.62
North Carolina	\$110.90	\$106.97	\$110.54	\$102.51	\$110.55
North Dakota	\$109.88	\$100.37	\$114.23	\$103.10	\$105.98
Nebraska	\$108.66	\$102.14	\$108.06	\$103.38	\$106.28
New Hampshire	\$105.28	\$103.50	\$113.56	\$104.25	\$109.68
New Jersey	\$116.33	\$109.51	\$123.84	\$111.09	\$114.35
New Mexico	\$113.71	\$106.55	\$115.54	\$107.52	\$105.42
Nevada	\$122.18	\$112.18	\$117.45	\$109.09	\$107.72
New York	\$126.90	\$117.98	\$135.26	\$119.92	\$116.71
Ohio	\$105.19	\$100.96	\$105.50	\$97.16	\$100.93
Oklahoma	\$115.02	\$109.48	\$109.89	\$104.21	\$140.82
Oregon	\$123.49	\$117.60	\$121.11	\$111.63	\$114.49
Pennsylvania	\$98.97	\$95.07	\$102.76	\$96.38	\$102.71
Rhode Island	\$98.58	\$96.73	\$101.90	\$95.37	\$103.78
South Carolina	\$109.72	\$106.03	\$108.09	\$103.99	\$113.23
South Dakota	\$102.78	\$100.39	\$112.08	\$101.22	\$107.26
Tennessee	\$110.06	\$106.28	\$108.94	\$101.74	\$108.79
Texas	\$122.22	\$115.77	\$116.19	\$109.84	\$109.12
Utah	\$123.91	\$115.52	\$120.32	\$113.34	\$114.54
Virginia	\$130.14	\$125.62	\$122.65	\$119.85	\$117.29
Vermont	\$109.21	\$108.66	\$123.32	\$110.72	\$111.90
Washington	\$124.43	\$116.95	\$122.50	\$113.86	\$114.61
Wisconsin	\$110.17	\$105.43	\$111.79	\$104.48	\$106.70
West Virginia	\$108.24	\$105.65	\$104.66	\$97.63	\$96.16
Wyoming	\$123.11	\$117.33	\$127.38	\$112.52	\$116.58

POWERFUL PERSONALIZATION

Kibo Personalization, the leading and most experienced personalization solution on the market, fueled by Monetate and Certona, empowers marketers to delight customers by enabling everything from quick one-off content changes to complex personalization across the full customer journey.

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