

Ecommerce Quarterly Benchmarks

Q2 2021

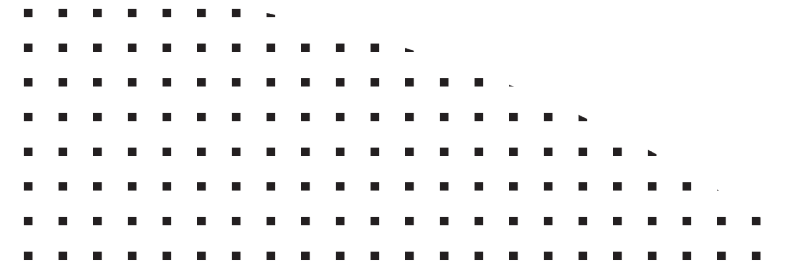


INTRODUCTION

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.

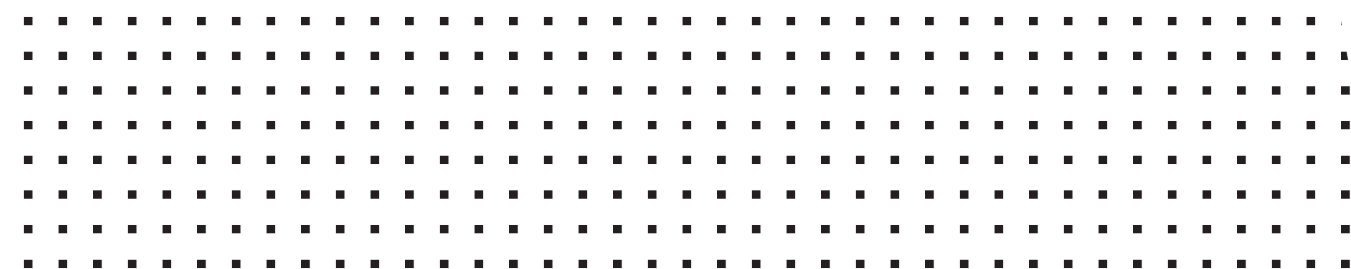
SUMMARY

As the world continues to open up, we see regional differences presented through online shopping behavior. The US has noticed an increase in buying behavior with consumers purchasing a product from a brand they connect with faster and with fewer clicks. Average page views have dropped across all regions as consumer expectations have seemingly increased. This is reflected even within the rise of bounce rate we've seen across factors. With high expectations intact, consumers who have remained engaged during their shopping journey have spent more money as reflected in AOV increases.



BENCHMARKS

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Average Page Views	8
Cart	12
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SESSION DISTRIBUTION

		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
US	Desktop	34%	33%	31%	32%	33%
US	Mobile Phone	62%	63%	66%	64%	64%
US	Tablet	4%	4%	3%	3%	3%
GB	Desktop	22%	23%	21%	21%	20%
GB	Mobile Phone	70%	70%	73%	73%	76%
GB	Tablet	7%	7%	6%	5%	5%
EMEA	Desktop	27%	28%	28%	29%	29%
EMEA	Mobile Phone	69%	69%	68%	68%	68%
EMEA	Tablet	3%	3%	4%	3%	3%
Other	Desktop	27%	27%	27%	26%	26%
Other	Mobile Phone	70%	70%	70%	71%	71%
Other	Tablet	3%	3%	2%	3%	2%

US traffic distribution remained flat while mobile users in GB continued to rise gradually.

BOUNCE RATE

Bounce Rate By Region							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
US	41.4%	42.6%	42.6%	42.4%	43.8%	6%	3%
Other	41.3%	42.1%	41.3%	40.8%	41.7%	1%	2%
EMEA	36.1%	39.3%	35.7%	36.0%	37.6%	4%	4%
GB	28.2%	29.6%	29.3%	30.3%	33.1%	17%	9%

All regions noticed an increase in bounce rate.

Despite the largest QoQ increase, Great Britain still showed the smallest level of bounce across all four listed regions.

Bounce Rate By Source							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Direct	41.1%	41.7%	41.5%	41.5%	44.0%	7%	6%
Social	40.0%	43.3%	43.5%	42.3%	45.4%	14%	7%
Email	31.5%	33.4%	33.9%	33.5%	34.7%	10%	4%
Search	27.8%	29.0%	28.4%	29.5%	29.9%	8%	1%

Bounce increased slightly across all channels since Q1 2021, with social seeing the highest increase.

Social's bounce rate increase has cemented its place as the source channel with the largest bounce rate.

Bounce Rate By Device								
		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
US	Desktop	41.8%	41.8%	40.9%	42.0%	44.6%	7%	6%
US	Mobile Phone	41.7%	43.4%	43.7%	43.0%	43.8%	5%	2%
US	Tablet	34.3%	35.3%	36.7%	35.9%	35.8%	4%	0%
GB	Desktop	23.5%	25.9%	24.4%	25.1%	27.2%	16%	8%
GB	Mobile Phone	30.2%	31.3%	31.2%	32.2%	35.1%	16%	9%
GB	Tablet	24.0%	24.9%	24.3%	24.4%	25.9%	8%	6%
EMEA	Desktop	40.8%	47.4%	39.0%	39.6%	40.3%	-1%	2%
EMEA	Mobile Phone	34.4%	36.4%	34.6%	34.7%	36.8%	7%	6%
EMEA	Tablet	31.7%	32.7%	31.5%	30.6%	31.5%	-1%	3%
Other	Desktop	35.2%	38.4%	39.7%	38.8%	40.3%	14%	4%
Other	Mobile Phone	43.7%	43.6%	41.9%	41.6%	42.1%	-4%	1%
Other	Tablet	40.2%	41.4%	39.9%	37.6%	43.4%	8%	15%

Great Britain has seen the greatest YoY and QoQ increases, with desktop and mobile being the leading culprits.

Bounce Rate By Operating System							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Linux	75.3%	72.3%	71.8%	73.8%	76.3%	1%	3%
iOS	37.8%	39.4%	39.0%	38.6%	40.6%	7%	5%
OS X	37.7%	39.1%	39.3%	39.3%	40.2%	7%	2%
Android	37.2%	37.9%	37.9%	37.2%	38.7%	4%	4%
Windows Phone	35.5%	42.7%	40.7%	43.5%	52.0%	46%	20%
Chrome OS	26.7%	28.2%	28.7%	28.0%	28.9%	8%	3%

AVERAGE PAGE VIEWS

Average Page Views By Region							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
GB	11.7	11.1	10.2	10.3	9.6	-18%	-7%
EMEA	10	8.7	8.4	8.3	8.3	-17%	0%
Other	8.6	7.8	7.6	7.4	7.6	-12%	3%
US	7.3	6.8	6.8	6.7	6.3	-14%	-6%

Average page views continues to drop across all regions and is at its lowest levels since Q2 of last year.

GB has a higher average page views count than the US due to a different composition of industries.

Page Views By Source							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Search	10.6	9.9	9.5	9.4	9.3	-12%	-1%
Email	8.7	8.2	7.8	7.8	7.8	-10%	0%
Direct	8.4	7.9	7.6	7.5	7	-17%	-7%
Social	6.3	5.3	4.7	4.7	4.6	-27%	-2%

Average Page Views By Device							Change since 2020 Q2	Change since 2021 Q1
		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021		
US	Desktop	8.3	7.9	8	7.5	7.1	-14%	-5%
US	Mobile Phone	6.7	6.2	6.2	6.2	5.9	-12%	-5%
US	Tablet	8.5	7.9	7.8	7.8	7.5	-12%	-4%
GB	Desktop	15.7	15	14.9	15.7	14.6	-7%	-7%
GB	Mobile Phone	10.3	9.6	8.7	8.5	8.2	-20%	-4%
GB	Tablet	13.2	13.1	12.7	13.7	13	-2%	-5%
EMEA	Desktop	9.6	8.2	9.3	8.9	9.3	-3%	4%
EMEA	Mobile Phone	10.1	8.8	7.9	8	7.7	-24%	-4%
EMEA	Tablet	11	10.1	9.7	9.9	10.2	-7%	3%
Other	Desktop	10.3	9.3	9.1	8.9	9	-13%	1%
Other	Mobile Phone	7.9	7.2	7	6.8	7.1	-10%	4%
Other	Tablet	8.3	7.4	7.3	6.7	6.7	-19%	0%

Average Page Views dropped across all devices in US and GB vs. previous quarters.

Average Page Views By Operating System							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Chrome OS	11.8	11.4	10.8	11.1	10.6	-10%	-5%
Windows	10.5	10.1	10.2	10	9.2	-12%	-8%
OS X	10.4	9.7	9.4	9.4	9.2	-12%	-2%
Android	8.8	8.2	7.6	7.5	7.3	-17%	-3%
iOS	8.1	7.4	7.1	7.2	6.9	-15%	-4%
Linux	2.2	2.3	2.6	2.6	2.3	5%	-12%

CART

Cart By Region

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
GB	18.4%	19.7%	18.3%	18.5%	17.9%	-3%	-3%
US	12.7%	12.2%	12.7%	11.8%	11.4%	-10%	-3%
EMEA	12.7%	10.6%	13.1%	12.0%	11.6%	-9%	-3%
Other	10.4%	9.8%	9.7%	8.8%	9.0%	-13%	2%

Cart change across all regions stayed relatively flat since Q1 2021.

Cart By Source

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Search	13.2%	11.9%	11.9%	11.3%	11.2%	-15%	-1%
Email	12.8%	11.6%	11.3%	11.1%	11.2%	-13%	1%
Direct	12.2%	12.9%	13.2%	12.4%	11.9%	-2%	-4%
Social	10.9%	10.4%	9.3%	8.4%	8.3%	-24%	-1%

All channels experienced a slight drop in cart rate QoQ except for email, which rose by 1%.

Direct has seen a slight decrease in cart rate from a year ago—all other channels experienced at least a 13% drop in cart rates.

Cart By Device

		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
US	Desktop	12.4%	12.1%	13.0%	11.4%	11.5%	-7%	1%
US	Mobile Phone	13.0%	12.2%	12.6%	12.0%	11.4%	-12%	-5%
US	Tablet	11.7%	11.7%	12.3%	11.3%	11.4%	-3%	1%
GB	Desktop	21.7%	23.0%	22.6%	24.1%	22.7%	5%	-6%
GB	Mobile Phone	17.5%	18.7%	17.0%	16.8%	16.6%	-5%	-1%
GB	Tablet	16.7%	19.0%	18.2%	20.3%	19.4%	16%	-4%
EMEA	Desktop	11.7%	9.3%	14.4%	12.6%	12.7%	9%	1%
EMEA	Mobile Phone	13.2%	11.2%	12.5%	11.7%	11.1%	-16%	-5%
EMEA	Tablet	10.7%	9.3%	15.0%	14.2%	13.7%	28%	-4%
Other	Desktop	11.9%	11.8%	11.3%	10.1%	10.5%	-12%	4%
Other	Mobile Phone	9.9%	9.1%	9.2%	8.4%	8.5%	-14%	1%
Other	Tablet	8.0%	8.1%	7.5%	6.0%	6.2%	-23%	3%

Cart was flat across most devices. Mobile Phones in the US and Desktop in GB appear to have had the biggest QoQ drops in cart rate.

Cart By Operating System

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Chrome OS	19.1%	18.3%	18.0%	18.1%	18.1%	-5%	0%
OS X	15.0%	14.8%	15.0%	14.4%	14.1%	-6%	-2%
iOS	14.2%	13.8%	13.6%	13.2%	12.7%	-11%	-4%
Windows	14.1%	14.2%	15.2%	14.1%	13.5%	-4%	-4%
Android	12.8%	12.6%	12.7%	12.0%	11.6%	-9%	-3%
Linux	3.1%	3.4%	4.5%	4.0%	3.7%	19%	-8%

Across mobile operating systems, iOS has seen the largest decrease in cart rate from a year ago.

Cart rate has generally decreased across all operating systems.

ABANDONED CART

Abandoned Cart By Region

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
EMEA	84.5%	83.0%	82.8%	82.6%	81.7%	-3%	-1%
Other	84.2%	84.2%	82.3%	83.3%	82.1%	-2%	-1%
GB	78.2%	77.6%	75.5%	75.3%	75.4%	-4%	0%
US	75.5%	76.2%	75.7%	77.4%	75.5%	0%	-2%

Abandoned Cart By Source

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Social	89.1%	89.2%	88.8%	88.5%	88.3%	-1%	0%
Email	81.8%	80.7%	78.6%	80.2%	80.4%	-2%	0%
Direct	77.0%	78.2%	76.9%	77.2%	76.5%	-1%	-1%
Search	75.2%	73.2%	72.6%	73.7%	73.6%	-2%	0%

Abandoned Cart By Device

		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
US	Desktop	65.5%	66.1%	65.6%	67.6%	66.1%	1%	-2%
US	Mobile Phone	81.0%	81.7%	80.8%	82.4%	80.6%	0%	-2%
US	Tablet	69.5%	70.7%	69.8%	70.1%	69.6%	0%	-1%
GB	Desktop	73.6%	72.6%	71.3%	71.4%	69.8%	-5%	-2%
GB	Mobile Phone	80.7%	80.0%	77.4%	77.1%	77.7%	-4%	1%
GB	Tablet	72.2%	73.1%	72.6%	72.6%	71.4%	-1%	-2%
EMEA	Desktop	76.5%	73.4%	76.2%	75.9%	74.1%	-3%	-2%
EMEA	Mobile Phone	87.6%	86.7%	86.2%	85.8%	85.5%	-2%	0%
EMEA	Tablet	74.9%	72.5%	79.9%	79.7%	78.4%	5%	-2%
Other	Desktop	77.4%	78.9%	75.9%	76.0%	73.8%	-5%	-3%
Other	Mobile Phone	87.6%	87.0%	85.5%	86.6%	86.0%	-2%	-1%
Other	Tablet	77.6%	79.8%	76.8%	77.9%	75.9%	-2%	-3%

Abandoned Cart Operating System

	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Linux	89.4%	85.7%	85.8%	84.5%	85.2%	-5%	1%
Windows Phone	85.3%	85.9%	84.4%	83.7%	86.5%	1%	3%
iOS	82.0%	81.8%	80.6%	81.4%	80.6%	-2%	-1%
Android	81.0%	80.9%	80.3%	80.2%	80.0%	-1%	0%
Chrome OS	77.4%	76.6%	75.5%	77.3%	75.0%	-3%	-3%
OS X	72.8%	72.6%	72.1%	73.5%	71.5%	-2%	-3%

CONVERSION RATE

Conversion Rate By Region							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
GB	4.0%	4.4%	4.5%	4.6%	4.4%	10%	-4%
US	3.1%	2.9%	3.1%	2.7%	2.8%	-10%	5%
EMEA	2.0%	1.8%	2.2%	2.1%	2.1%	7%	1%
Other	1.6%	1.6%	1.7%	1.5%	1.6%	-2%	9%

EMEA and GB experienced an increase in conversion rate YoY while the US experienced a decrease.

Quarter to quarter, the US conversion rate has increased but has yet to grow back to where it was in Q2 2020, or even Q3 2020.

Conversion Rate By Source							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Search	3.3%	3.2%	3.3%	3.0%	3.0%	-10%	0%
Direct	2.8%	2.8%	3.1%	2.8%	2.8%	0%	-1%
Email	2.3%	2.2%	2.4%	2.2%	2.2%	-6%	0%
Social	1.2%	1.1%	1.0%	1.0%	1.0%	-19%	0%

Conversion from all channels stayed relatively flat.

Conversion rate across social has steadily fallen quarter over quarter.

Conversion Rate By Device								Change since 2020 Q2	Change since 2021 Q1
		Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021			
US	Desktop	4.3%	4.1%	4.5%	3.7%	3.9%	-9%	5%	
US	Mobile Phone	2.5%	2.2%	2.4%	2.1%	2.2%	-10%	5%	
US	Tablet	3.6%	3.4%	3.7%	3.4%	3.5%	-3%	2%	
GB	Desktop	5.7%	6.3%	6.5%	6.9%	6.8%	19%	-1%	
GB	Mobile Phone	3.4%	3.7%	3.9%	3.8%	3.7%	9%	-4%	
GB	Tablet	4.7%	5.1%	5.0%	5.6%	5.5%	19%	-1%	
EMEA	Desktop	2.7%	2.5%	3.4%	3.0%	3.3%	19%	7%	
EMEA	Mobile Phone	1.6%	1.5%	1.7%	1.7%	1.6%	-2%	-3%	
EMEA	Tablet	2.7%	2.6%	3.0%	2.9%	3.0%	10%	3%	
Other	Desktop	2.7%	2.5%	2.7%	2.4%	2.8%	3%	14%	
Other	Mobile Phone	1.2%	1.2%	1.3%	1.1%	1.2%	-3%	5%	
Other	Tablet	1.8%	1.6%	1.7%	1.3%	1.5%	-16%	13%	

Conversion rate has increased across all devices in the US.

While GB experienced a slight drop in conversion across all devices.

EMEA remained relatively flat in conversion with a slight increase on desktop.

Conversion Rate By Operating System							
	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Change since 2020 Q2	Change since 2021 Q1
Windows	4.7%	4.6%	5.0%	4.5%	4.5%	-4%	0%
Chrome OS	4.3%	4.3%	4.4%	4.1%	4.5%	5%	10%
OS X	4.1%	4.1%	4.2%	3.8%	4.0%	-2%	5%
iOS	2.5%	2.5%	2.6%	2.5%	2.5%	0%	0%
Android	2.4%	2.4%	2.5%	2.4%	2.3%	-4%	-4%
Linux	0.3%	0.5%	0.6%	0.6%	0.6%	100%	0%

AVERAGE ORDER VALUE

Average Order Value By Region							
	Q2 2020 (USD)	Q3 2020 (USD)	Q4 2020 (USD)	Q1 2021 (USD)	Q2 2021 (USD)	Change since 2020 Q2	Change since 2021 Q1
Other	\$119.71	\$122.10	\$133.86	\$135.77	\$156.02	30%	15%
US	\$114.05	\$114.17	\$118.89	\$128.45	\$156.30	37%	22%
EMEA	\$103.91	\$113.27	\$138.26	\$144.04	\$155.09	49%	8%
GB	\$79.59	\$92.27	\$93.53	\$95.51	\$102.46	29%	7%

The US experienced the largest increases in AOV since Q1 2021, most likely due to the region opening back up the most.

Concert venues, hotel bookings, and flight bookings contributed to this increase as well.

Average Order Value By Source							
	Q2 2020 (USD)	Q3 2020 (USD)	Q4 2020 (USD)	Q1 2021 (USD)	Q2 2021 (USD)	Change since 2020 Q2	Change since 2021 Q1
Direct	\$106.26	\$111.40	\$115.82	\$120.47	\$137.76	30%	14%
Email	\$100.11	\$93.79	\$98.06	\$96.03	\$103.14	3%	7%
Search	\$88.19	\$90.17	\$98.07	\$99.91	\$115.46	31%	16%
Social	\$73.49	\$74.20	\$79.51	\$74.30	\$81.05	10%	9%

All channels experienced some increase in AOV, both QoQ and YoY.

Search and direct channels experienced the largest increase in AOV from the previous quarter.

Email saw the smallest increase since email clicks often generate more revenue vs. organic search traffic and didn't seem affected at all during the pandemic.

Average Order Value By Device

		Q2 2020 (USD)	Q3 2020 (USD)	Q4 2020 (USD)	Q1 2021 (USD)	Q2 2021 (USD)	Change since 2020 Q2	Change since 2021 Q1
US	Desktop	\$134.85	\$134.75	\$137.69	\$152.02	\$184.44	37%	21%
US	Mobile Phone	\$95.25	\$96.23	\$103.93	\$110.17	\$134.39	41%	22%
US	Tablet	\$101.30	\$91.30	\$96.31	\$92.11	\$101.18	0%	10%
GB	Desktop	\$92.11	\$110.29	\$102.37	\$104.86	\$115.88	26%	11%
GB	Mobile Phone	\$72.19	\$81.85	\$89.14	\$90.93	\$96.12	33%	6%
GB	Tablet	\$83.32	\$94.10	\$92.92	\$92.23	\$99.86	20%	8%
EMEA	Desktop	\$116.45	\$127.14	\$156.37	\$173.08	\$190.60	64%	10%
EMEA	Mobile Phone	\$95.34	\$104.10	\$122.83	\$120.96	\$124.93	31%	3%
EMEA	Tablet	\$102.50	\$106.71	\$140.02	\$147.07	\$149.34	46%	2%
Other	Desktop	\$133.93	\$139.09	\$153.28	\$153.22	\$195.53	46%	28%
Other	Mobile Phone	\$107.06	\$107.97	\$118.02	\$121.95	\$122.34	14%	0%
Other	Tablet	\$124.83	\$119.51	\$127.76	\$128.17	\$125.39	0%	-2%

Other than EMEA, the US saw some of the largest YoY AOV increases across devices, and saw the most consistent large increases QoQ.

The largest AOV increases happened across desktop devices.

Average Order Value By Operating System							
	Q2 2020 (USD)	Q3 2020 (USD)	Q4 2020 (USD)	Q1 2021 (USD)	Q2 2021 (USD)	Change since 2020 Q2	Change since 2021 Q1
OS X	\$124.77	\$123.37	\$131.40	\$137.41	\$158.60	27%	15%
Windows	\$123.40	\$131.62	\$134.51	\$144.44	\$177.99	44%	23%
Chrome OS	\$96.11	\$102.04	\$106.43	\$112.44	\$128.68	34%	14%
iOS	\$92.42	\$95.80	\$105.07	\$108.85	\$124.48	35%	14%
Linux	\$87.06	\$66.85	\$76.46	\$76.95	\$89.85	3%	17%
Android	\$81.46	\$85.06	\$94.21	\$93.63	\$101.34	24%	8%

All operating systems experienced an increase in AOV.

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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