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US MOBILE TRENDS 2021 ROUNDUP

The average US adult spent 25 additional minutes per day on mobile apps in 2020 than the year prior, according to eMarketer. Gains across most mobile activities will become permanent this year, when US adults will add 6 minutes to their average time spent with apps.

eMarketer has curated this Roundup of the latest data and marketing insights in the mobile landscape, across key areas such as advertising, upcoming regulation, video, and more.

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SPONSOR MESSAGE

As time spent using mobile apps rises, marketers are devoting more of their digital advertising budgets towards apps. As a result, education is needed to ensure they are getting the most out of this medium.

For brands and agencies looking to maximize their in-app advertising investment, it will be key for them to recognize the latest trends of how consumers use apps and to leverage leading resources for in-app advertising success.

Additionally, it will be crucial for advertisers to better understand mobile in-app advertising now, both as time spent in-app rises further and because the worlds of connected television and digital out-of-home are largely app-driven environments.

InMobi has been at the forefront of the in-app advertising world, helping brands across the globe to understand, identify, engage, and acquire their best customers on mobile.

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OVERVIEW

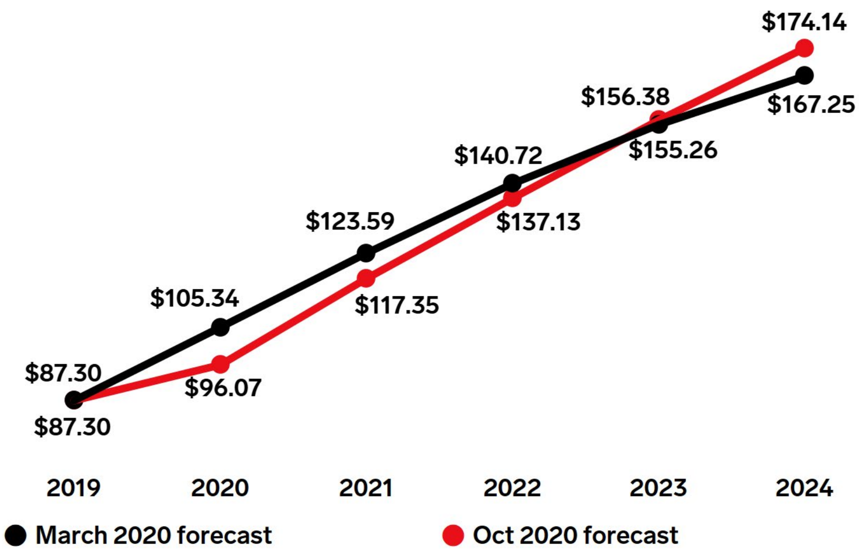
The average US adult spent 25 additional minutes per day on mobile apps in 2020 than the year prior, according to eMarketer. Gains across most mobile activities will become permanent this year, when US adults will add 6 minutes to their average time spent with apps. Although long-term trends explain the majority of this increase, the pandemic clearly boosted growth, particularly in mobile activities like video streaming, gaming, mobile shopping, and digital health. The average US adult spent an additional 11 minutes daily with social media apps last year.

It's not just that existing users are spending more time in apps, but certain app categories have seen a large increase in users amid the pandemic as well. Our August 2020 forecast estimated that 207.5 million Americans used subscription OTT services last year, up 13.1% year over year (YoY) and up 8 percentage points from our February forecast. Video game viewer and live video audience numbers also accelerated.

Although some of these changes will fade post-pandemic, others will persist, including increased digital video viewing and ecommerce adoption, and these behavioral changes will continue to boost time spent with mobile. This should translate into rapid growth in mobile advertising in the coming years. We anticipate that mobile ad spend will not only return to high growth rates this year, but total mobile advertising will actually exceed our pre-pandemic predictions in 2023.

This year, US mobile ad spending will increase by 22.2% to $117.35 billion. This is still below our pre-pandemic forecast ($123.59 billion), but by the end of 2023, mobile ad spending will reach $156.38 billion, edging out our previous figure ($155.26 billion). In 2024, spend will total $174.14 billion, compared with our pre-pandemic estimate of $167.25 billion.

How Has the Forecast for Mobile Ad Spending in the US Changed? 2019-2024
billions, March 2020 vs. Oct 2020



Note: includes classifieds, display (banners and other, rich media and video), email, lead generation, messaging-based and search advertising; includes ad spending on tablets
Source: eMarketer, October 2020

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Daniel Taiz, president and COO of digital video optimization service Penthera, noted that the pandemic has hastened the shift from pay TV to OTT. "That was probably coming already, but [the pandemic] accelerated it ... in a way that's not going to go back," he said.

MOBILE WILL GAIN MORE PREMIUM OTT MINUTES

As people hunkered down at home during the pandemic, they spent a lot more time viewing digital video. As a result, US adults spent 19 additional minutes per day on average watching digital video last year, including 5 more minutes on mobile (and 10 more in apps, as browser video minutes dropped, not shown in the chart below). The biggest source of increased viewing, however, was "other connected devices," which primarily refers to connected TVs (CTVs).

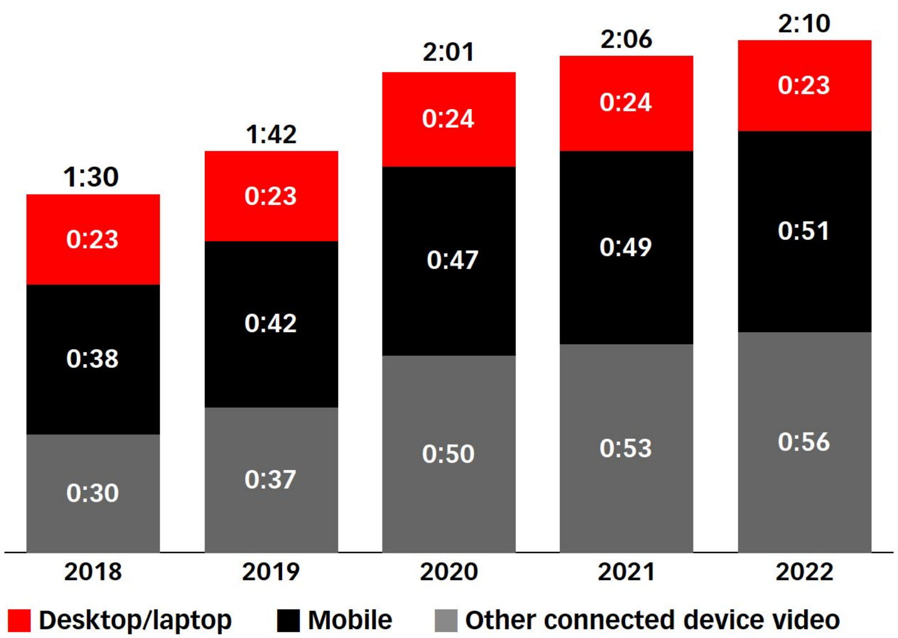
All service types gained, but OTT video grew tremendously. Premium subscription services, such as Netflix, Disney+, and Hulu, increased their viewer numbers in the US by 13.1% in 2020, a significantly bigger growth rate than we anticipated pre-pandemic.

The majority of premium OTT viewing is on CTV devices like Roku or smart TVs that connect directly to the internet. Conviva found that 65% of streaming OTT viewing occurred on these devices in Q3 2020, compared with 10% on mobile and 5% on tablets.

Advertisers noticed and poured more than $8 billion into US CTV ad spending last year, up 27.1% YoY. Advertisers mostly spend money in OTT based on audiences rather than target specifically by device. But as mobile minutes for OTT services increase, so should spending within mobile. "Whether in the living room or on the move, mobile is an increasingly important component in the OTT mix," said Katie Madding, chief product officer of Adjust.

In 2021, more OTT video should occur on mobile for three reasons. First is the growth of ad-supported video-on-demand (AVOD). MoffetNathanson found that five leading AVOD platforms saw revenues grow a combined 31% YoY in Q2 2020, albeit from a smaller base than subscription video-on-demand (SVOD) platforms have. "AVOD skews

Digital Video: Average Time Spent in the US, by Device, 2018-2022
hrs:mins per day among population



Note: ages 18+; includes all time spent viewing video via desktop/laptop computers, mobile (smartphones and tablets), and other connected devices (game consoles, connected TVs or OTT devices), regardless of multitasking; numbers may not add up to total due to rounding
Source: eMarketer, April 2020

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more to mobile than SVOD networks do," said Tal Chalozin, co-founder and chief technical officer of digital video advertising company Innovid. "For example, Tubi and Pluto TV have higher exposure to mobile than the TV networks, such as the AMC app, the Hulu app, and the like." He estimates that while less than 10% of time spent with Hulu would be on mobile devices, Tubi's figure would be "much, much larger than that."

Second, people will begin to move around more post-pandemic, which should increase mobile viewing.

US adults spent 19 additional minutes per day on average watching digital video last year, including 5 more minutes on mobile.

Finally, better cellular networks, including early 5G, and better download options will improve the mobile viewing experience. "The real innovation here is how robust mobile has access to bandwidth to have an essentially TV-like viewing experience," said Kevin Hunt, senior vice president of global marketing at video ad serving platform SpotX. "Removing buffering, removing some of the ad decisioning that needed to be done on the mobile device, is instead done server side—so you're getting a constant stream of content, all facilitated on the back of high-speed networks, with the most recent being 5G."

REGULATIONS WILL FURTHER SQUEEZE THE SUPPLY OF PRECISE LOCATION DATA

The location data industry has already faced some challenges in recent years. iOS 13, released in 2019, included an opt-in window for location tracking, which dramatically reduced the quantity of precise location data from iOS devices. iOS 14 goes further, giving users more options by letting them choose between sharing approximate or precise data.

On the regulatory side, the EU General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) define location data as personal data that requires that a user opt in for collection and transparent tracking of who gets the data. The newly passed California Privacy Rights Act (CPRA) goes a step further and considers precise geolocation data as sensitive personal data requiring even more stringent protections.

These regulations will reduce the amount of precise geolocation data available to marketers, but further scrutiny is likely on the way with the Biden Administration and the growing number of members of Congress with a deepening interest in regulating consumer data.

Today, much of location data is gathered via the bid-stream in open auctions. Any demand-side platform (DSP) participating in an auction can collect the location data from the supply side, even if it is not the winning bid. This process of collecting data downstream from the original publishers is rarely understood by consumers and barely regulated in the US (outside of California), which has led to some dubious uses of location data.

The New York Times opinion section, for instance, was able to identify individuals from supposedly anonymized location data. More recently, a study from mobile data firm Mobilewalla revealed demographic characteristics of Black Lives Matter (BLM) protests, sparking backlash.

In response to the study, Sens. Elizabeth Warren and Ron Wyden asked Mobilewalla and the Federal Trade Commission (FTC) about the bid-stream syphoning. Separately, the Federal Communications Commission (FCC) said it was looking at bid-stream syphoning by large telecom companies.

Given the incoming administration's general approval of privacy restrictions, it's likely that more regulations on location data are on their way.

Another big source of location data comes directly from software development kits (SDKs) in apps. Consumers have more control over this data collection, but not over its ultimate uses. A recent case showed how one location company sold location data it gathered from a Muslim prayer app to a US security agency.

Sen. Wyden has proposed legislation restricting location data usage. More generally, various data privacy bills circulating in Congress define precise location data as sensitive personal data. Given the incoming administration's general approval of privacy restrictions, it's likely that more regulations on location data—either as a general consumer data privacy bill or more narrow bills focused on location data—are on their way. According to a March 2020 survey from Morning Consult, nearly half (45%) of US adults were "very uncomfortable" with technology companies sharing location data with the government.

IN-APP CONTEXTUAL ADVERTISING WILL TAKE A BIG STEP FORWARD

In light of the pending deprecation of third-party cookies and other identifiers, contextual advertising has risen in the web world—but it's still difficult to execute within the app eco-system, partly because there's no easy way to crawl content. This year, more publishers will adopt or develop contextual tools that will work in app environments.

Large publishers have started using first-party data to create cohorts based on demographics and interests, and they've also built contextual advertising solutions. The New York Times and The Washington Post, for instance, have introduced a range of contextual products that code content by topic and user consumption patterns. Along with the cohorts they are developing, they have powerful contextual targeting engines.

Other firms have brought contextual targeting to web ad exchanges. These companies crawl pages to understand the content, traffic, and other elements of web pages, but this approach doesn't work for apps. Contextual advertiser solutions that delve into app-based publisher content must be implemented by the app developers themselves.

Meanwhile, the app advertising system continues to look for signals that can provide a degree of contextual analysis without a deeper dive into the content. A lot of this starts with cohort analysis, but it can add other signals to create fairly sophisticated targeting that doesn't require a personal ID.

Contextual advertising's attractiveness will lead to more contextual ad products in 2021, including turnkey solutions for smaller app developers to activate their own content and first-party data.

Mobile App Activities: Average Time Spent in the US, 2018-2022

hrs:mins per day among population

	2018	2019	2020	2021	2022
Audio	0:51	0:57	0:59	1:03	1:05
Social networks	0:38	0:41	0:52	0:51	0:53
Video	0:32	0:36	0:46	0:47	0:48
Games	0:21	0:23	0:26	0:26	0:26
Messaging	0:18	0:20	0:24	0:24	0:24
Other	0:15	0:19	0:16	0:18	0:19
Total	**2:49**	**3:10**	**3:35**	**3:41**	**3:47**

Note: ages 18+; includes all time spent with mobile apps, regardless of multitasking; for example, 1 hour of multitasking with social network apps while listening to mobile audio apps counts as 1 hour for social and 1 hour for audio; numbers may not add up to total due to rounding
Source: eMarketer, April 2020

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HOW MARKETERS AND SERVICE PROFESSIONALS USE SMS MESSAGES

Marketers and service professionals are using SMS messages in many ways.

1. As a complement to email marketing: Despite email's continued success, some marketers are concerned that consumers may be tuning emails out. Some brands are utilizing SMS to follow up on messaging they may have missed.

2. As a live chat substitute: Email marketing could have been used to develop a two-way conversation between brands and audiences but didn't. SMS is conversational and facilitates an ongoing dialog between brands and consumers.

3. To provide a human element: SMS may be AI-deployed depending on rules written by the brand, and an ensuing conversation may even be managed by AI; however, when warranted, a human can take over the conversation to improve the customer experience.

4. For transactional messaging: SMS is often used to send transactional messages informing a user that an ecommerce order has shipped or to review a recent order. These messages needn't be used for ecommerce orders alone: DoorDash and other delivery services provide updates on deliveries via SMS, and many service-oriented businesses will confirm appointments via SMS, as well.

5. To guide digital shoppers to a conversion: Reminders to complete ecommerce transactions are an effective use of SMS, with compelling results. Attentive, for example, said it helped clients recover 5 million online carts in 2020 using triggered abandoned cart text message reminders.

6. To send time-sensitive messages: SMS is an ideal marketing channel for communications that need to be opened and acted upon quickly. That's especially true when compared with email, which experiences far lower open rates and takes longer for a consumer to notice. Types of time-sensitive messages often include sale previews and last chance messaging to let consumers know about expiring offers.

7. As a replenishment mechanism: While not commonplace, this is an area to watch. Brands can receive an order via text message. The customer is then routed to a page where they input shipping and billing information that's saved. Subsequent orders can then be placed via text without the customer needing to re-enter such information, eliminating a friction point.

Companies employing SMS marketing tend to either be innovators, early adopters, or simply have less loyalty to other channels like email. Interviews with marketing executives revealed that most who are not currently utilizing SMS are watching the space closely or in the planning stages of adding those capabilities to their marketing tech stack.

SMS marketing can be highly cost-effective, especially for smaller businesses. Janna Land, co-founder and COO of direct-to-consumer (D2C) food retailer FarmFoods, Inc., said SMS gave her "the ability to break through in a very noisy and competitive advertising environment."

Land believes customers who receive texts are more inclined to open the company's emails. In fact, FarmFoods texted a list of customers who had stopped engaging with its email marketing and drove $4,000 of sales in less than 24 hours at a cost of just $60.

Luxury retailers are embracing SMS differently. Norman Guadagno, CMO of marketing technology solutions provider Acoustic, cited the example of a salesperson at Louis Vuitton taking a customer's phone number after a purchase to follow up with a text containing a link to a webpage with a curated set of goods they might be interested in. That concierge-like service makes SMS feel more appropriate for that segment of the market.

Alex Jennison, ecommerce marketing manager at apparel company Mad Engine, whose brands include LRG Clothing and Neff Headwear, uses SMS messages promoting new product launches, promotions, in-person events, and automated messaging sequences, as well. Sam Shames, co-founder and COO of wearables startup Embr Labs, deploys SMS largely to convert abandoned carts in the lower funnel.

"[SMS gave us] the ability to break through in a very noisy and competitive advertising environment."

Janna Land
Co-Founder and COO, FarmFoods, Inc.

MOBILE IN-GAME ADVERTISING GAINS APPEAL

Mobile gaming was an early pandemic bright spot for the media industry in consumer time spent and continued advertiser interest. On the consumer side, for example, Flurry Analytics reported increased numbers of users and sessions in gaming apps on its mobile app analytics platform in March and Q2 2020.

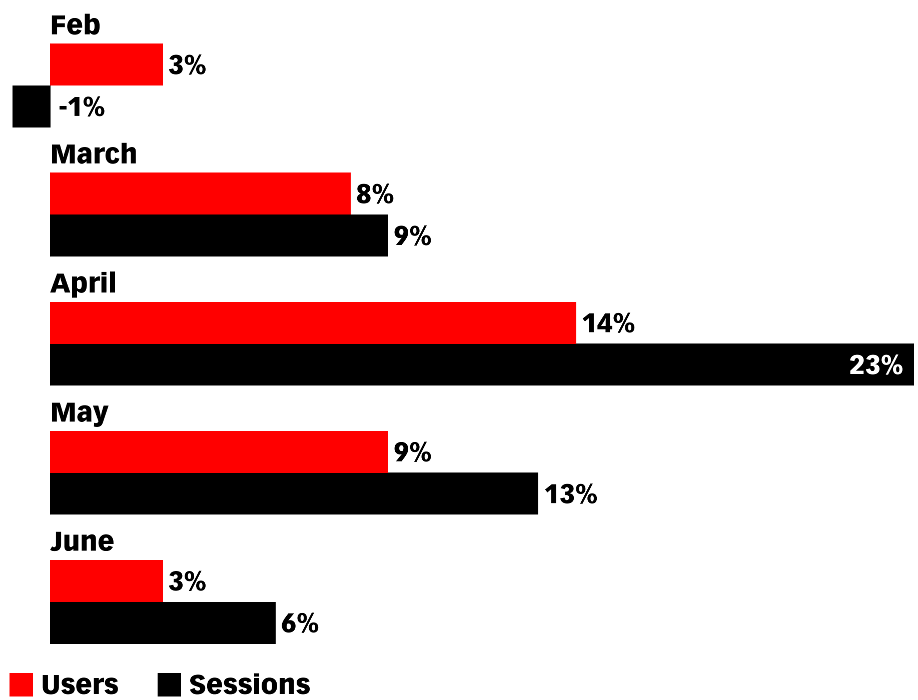
These trends led us to revise our mobile phone gamer estimate upward for 2020. Pre-pandemic, we had expected 2.6% growth in the number of people playing games via mobile at least monthly in 2020. We increased that estimate to 5.1% in August. We made similar revisions to our estimates of gamers in other channels.

Ad spending held up relatively well in this area—in large part because a lot of in-game advertising comes from other games or user acquisition-oriented advertisers with apps in different verticals like food delivery or ride-hailing. Ad sellers reported a glut of impressions from more users playing more sessions, leading to lower prices for ads and therefore a virtuous cycle for user acquisition.

According to Facebook CFO Dave Wehner's remarks on the company's Q2 2020 earnings call, "gaming continues to be a top five vertical for us in terms of advertising. And we saw strong growth in the second quarter, especially in the beginning of the quarter when prices were lower in the auction. We saw a lot of demand from our gaming advertisers."

Ben Holmes, vice president of programmatic demand at in-app ad monetization partner AdColony, noted that these pandemic trends hit at a time when advertisers were already gaining an understanding of and comfort with the gaming space. "Marketers, which we saw were historically very hesitant to enter the space, were already talking about test budgets," he said. "That trend had already started, and as consumption

Coronavirus Impact: Change in US Average Daily Gaming App Users and Sessions, Feb-June 2020
% change vs. Jan 2020



Note: represents activity on Flurry's platform, broader industry metrics may vary
Source: Flurry Analytics as cited in company blog, July 7, 2020
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habits changed with everyone staying home, we saw more traffic being generated, which led marketers to see the overall potential." He noted AdColony has seen particular interest in in-game ads last year from pharma, retail, consumer packaged goods (CPG), and political advertisers.

"Gaming continues to be a top five vertical for us in terms of advertising." —Dave Wehner, CFO, Facebook

But the identity crisis is expected to severely affect gaming. User acquisition-focused app advertisers are going to lose a lot of their current capabilities to measure customer lifetime value and target the most valuable customers with in-app ads. But none of the experts we've spoken with recently, or those we interviewed throughout 2020, expected a doomsday scenario here.

"I do believe based on our testing so far that user acquisition can still work programmatically without Apple's IDFA [Identifier for Advertisers], using contextual targeting," said Offer Yehudai, president at mobile in-app monetization partner Fyber. "We'll fine-tune the unit economics, costs per acquisition [CPAs] and lifetime value will go down, and they will balance. Many people believe hypercasual will take a big hit, but when I look at user acquisition for hypercasual, it's mainly category targeting." He was more concerned, instead, about social casino games and midcore titles that rely on more in-app spending by users. Those types of games may find whale hunting more difficult.

THE GROWTH OF IN-APP ADVERTISING IN 2021

This article was contributed and sponsored by InMobi.

Richard Thomas
Head of Brand Marketing, North America, InMobi

As eMarketer's data clearly shows, time spent in app has never been higher. With consumers spending more time at home in 2020 as compared to previous years, mobile apps became the most prevalent option for socializing, buying, gaming, streaming, reading, and just about everything else. As a result, advertisers are following the eyeballs and increasingly advertising in apps.

While some of this growth trajectory is directly attributable to the pandemic, the rising dominance of apps and in-app advertising was already well underway even before March 2020. In many ways, 2020 was not an anomaly but rather the catalyst to the future of advertising and media.

A lot of brands used in-app advertising successfully in 2020, and we fully expect to see more of this type of advertising from leading brands in 2021, along with new brands engaging in this tactic.

Perception vs. reality

People are spending a lot of time in apps, and this has only accelerated during the pandemic. Both before and during the pandemic in 2020, mobile was even more popular than TV, making it a true mass media.

So why does it seem that in-app advertising is not more readily understood, nor broadly touted as a leading media tactic amongst our colleagues? Is it because of an effectiveness issue? That is not the case, as the industry has made a concerted push to improve transparency, viewability, privacy, and overall effectiveness for advertisers, publishers, and end users alike.

In-app advertising's growth has also come as a result of the industry's relentless pursuit to improve effectiveness overall and constantly innovate. The industry has made great strides around viewability, measurability, and fraud. The release of the Open Measurement (OM) SDK improves tracking and viewability. App categorization helps to promote brand safety, as brands can use these categories to determine the best apps to advertise on. And, app-ads.txt and sellers.json improve transparency and clamp down on fraud. This helps explain why in-app advertising is 25% safer than mobile web advertising.

Is in-app lagging because TV has more interesting ad formats or creative options? That is not the case either. From a creative opportunity point of view, in-app provides more freedom for brands to express themselves—including formats, interactivity, and knowing who you are reaching in the environment and mindset they are in. In-app is truly the epitome of contextual advertising.

Charting the future of in-app advertising

Despite a rapidly changing digital advertising landscape, it's easy to see mobile becoming even more popular in the future as time spent in app rises further. We fully expect to see more advertising by those who participated in this trend in 2020 and more new brands engaging in this tactic this year.

Mobile app usage will continue to rise in 2021 and beyond. Brands can take advantage of this situation by working with proven mobile in-app advertising experts who can help them maximize their in-app investments.

Why In-App Advertising?

MORE
DEVICES

81%*

of Americans have a smartphone

MORE
APPS

60-90**

Average number of installed apps

MORE
TIME

3.5Hrs***

Average time Americans spend using mobile apps per day

MORE
DOLLARS

86%***

of all mobile ad spending is in app

InMobi is here to help you navigate the in-app advertising landscape.

Our platforms enable you to
understand, **identify**, **engage** and **acquire** your mobile in-app consumer.

INMOBI
Driving Real Connections

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Q&A: TD BANK SVP TALKS DIGITAL STRATEGIES AMID THE PANDEMIC

Since the outbreak of the coronavirus pandemic, extending support to struggling customers and small businesses has been top of mind for banks. But it's not enough to just offer support: Banks need to effectively communicate to customers what features are available and how to use them, especially when it comes to innovative digital offerings.

Insider Intelligence spoke with Alissa Van Volkom, senior vice president and head of customer and product marketing at TD Bank, about how marketers have changed their strategies to reach customers in the past year, how TD leveraged existing channels to provide pandemic-specific solutions, and how it is tailoring its public-facing messaging to stand out in a "sea of sameness."

How are marketers monitoring shifts in consumer behavior and expectations, and how are they reflecting those learnings in campaigns and customer experience?

Everyone has access to so much information, and the biggest challenge has been discerning the pertinent information and insights. I think we're seeing fewer new trends and more acceleration of existing trends. One area is digital acceleration: We have adapted both our marketing and how we service customers through digital.

There's also a need for differentiation, as there always has been. But at the height of the pandemic, and still a bit now, you see a lot of this sea of sameness. A lot of the "unprecedented times" and "we're here for you" messaging. The need to break through and understand what problems we're solving for our customers, how we're doing that, and how we communicate it to our customers [has] become really, really important.

What kinds of new content has TD created in response to new consumer behaviors?

During the height of the pandemic, a lot of our locations were still open, but we were still talking to our customers about how they use our digital services. A lot of the content early on was focused on digital adoption and helping customers understand what they could do safely from their home, and making sure they understood when they could come into our locations.

Also, small business has always been an incredibly important segment for TD, especially the smaller side of small business. So, ensuring things like Paycheck Protection Program loan availability was an extremely heavy focus for us. We were communicating with small-business owners on a regular basis, and we emerged as a leader in that space. During that time, we created a lot of content around our small-business clients who were doing amazing things on behalf of the citizens in their communities—that was a big focus for us within our content development.

We also adapted some content that we already had. We'd previously had an ad campaign called "Dancer," which featured a banker dancing in one of our retailer branches, and so we pushed out our "Dancer from Home" video. That was a way for us to cut through that sea of sameness. And we didn't do it at the height of the pandemic—we waited until it made sense. But it really brought our brand through in an unexpected way and let us talk about our digital services and what you could do from home.

You mentioned educating consumers on what services they can use from home. Was there demand for instructional content on any specific features?

We reached out to almost 90% of our customer base to talk about different services, whether it was signing up for the mobile app or checking their balances. And when the stimulus checks began to arrive, everybody wanted to either deposit it immediately, access it, or find out where it was. Our drive-thrus were open a large majority of the time, and people wanted to use them because they weren't comfortable with depositing their checks on mobile—access to cash and depositing checks were big concerns—so we were being proactive with our customers. We enabled our branch colleagues to send customers a message through SMS with tutorials on how to deposit checks on mobile next time. We were trying to find unique ways to help customers get the service they needed.

How have the role and scope of the marketing department evolved during the pandemic?

Marketing has always been a growth driver. It has now taken on the role of helping the broader organization understand the transformation and acceleration to digital, from both a marketing standpoint and a channel standpoint. Since the pandemic, the bank has been turning to marketing more to understand what customers are really looking for, and how the bank can deliver it to them in a quick and agile way—which usually means digitally. I think that it's been a fairly big shift within the organization: How do we continue to tell this digital story, how do we ensure good alignment around the capabilities needed to deliver to our customers digitally, and then how do we ensure that we're reaching them from an omnichannel standpoint?

"We enabled our branch colleagues to send customers a message through SMS with tutorials on how to deposit checks on mobile next time. We were trying to find unique ways to help customers get the service they needed."

Are there any other initiatives you'd like to talk about?

One of the areas that we've looked at this entire time is how we can continue to innovate in the spirit of our "Unexpectedly Human" campaign and show up in different ways for our customers. We've always had a feature where customers can get their credit or debit card instantly reissued in-branch, and we recently launched a curbside pickup option, because we saw that even when our branches were open, some customers weren't comfortable coming in. As curbside pickup got this huge uptake across other sectors, we took that concept and adapted the instant issuing [of cards] for a use case that resonated with our customers in the midst of the pandemic. Delivering to our customers in an unexpected way continues to be a key driver both on the marketing side and across the bank as a whole.

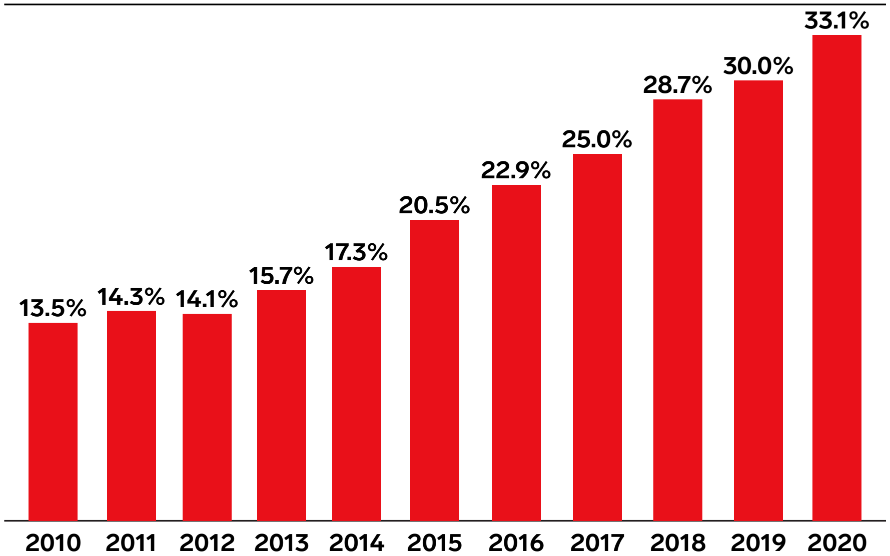
NIKE'S DIGITAL SALES CONTINUE TO SEE DOUBLE-DIGIT GROWTH AMID D2C PUSH

Nike reported digital sales increased by 84% YoY in its fiscal Q2 2021 (ended November 30, 2020), led by triple-digit growth in North America. This was the apparel company's third consecutive quarter of double-digit growth in digital sales. Nike also reported that total revenues increased by 9% YoY to $11.2 billion, with China posting 24% growth YoY, likely driven by Singles' Day tailwinds. Nike has invested substantially in its direct-to-consumer (D2C) ecommerce operations during the pandemic, building on the success of its mobile apps, including Nike SNKRS. In 2020, 33.1% of its total revenues came from D2C sales worldwide..

Established brands like Nike saw substantial D2C growth in 2020, and direct sales will continue to be a key area in 2021. In Q2 2020, for example, lululemon posted 157% growth in D2C sales, which comprised 61.4% of its net revenues, though it's important to note that unlike Nike, it does not have a significant wholesale business with other distribution partners. Levi Strauss and adidas both reported D2C sales growth reaching approximately 40% of their revenues during their most recent quarters. As more transactions occur digitally, brands can leverage additional first-party data and build stronger customer relationships. Such incentives will likely motivate brands to advance their D2C strategies in 2021 with new digital sales initiatives.

Nike Direct-to-Consumer Sales Worldwide, 2010-2020

% of total revenues



Source: NIKE, Inc. company reports as cited by Statista; eMarketer calculations, Nov 10, 2020

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Nike has invested substantially in its D2C ecommerce operations during the pandemic, building on the success of its mobile apps, including Nike SNKRS. In 2020, 33.1% of the company's total revenues came from D2C sales worldwide.

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