

# How holiday shopping (actually) went, Walmart's online business, and Peloton buys Precor

## AUDIO

### Andrew Lipsman

eMarketer principal analyst at Insider Intelligence Andrew Lipsman discusses how holiday shopping in 2020 actually went: how much was bought online, whether "shipageddon" came true, and the retail winners and losers. He then explains the implications of Walmart's ecommerce boss leaving, Poshmark's and Affirm's IPOs, and why Peloton is buying Precor.

#### US Holiday Season Click-to-Door Speed\* for US Digital Purchases Made on Amazon vs. Other Retail Sites, Nov 2-Dec 21, 2019 & Nov 2-Dec 21, 2020

days

	2019		2020	
	Amazon	Other	Amazon	Other
Nov 2	3.0	6.9	2.6	5.8
Nov 9	3.0	6.7	2.7	6.1
Nov 16	3.0	6.7	2.9	6.5
Nov 23	3.5	7.4	3.7	7.5
Nov 30	3.5	7.6	3.4	7.7
Dec 7	3.2	6.4	3.1	6.5
Dec 14	3.0	6.0	2.8	5.1
Dec 21	3.7	7.7	2.2	3.6

Note: represents activity on Rakuten Intelligence's platform, broader industry metrics may vary; \*the number of days from a digital purchase transaction to package arrival  
Source: Rakuten Intelligence as cited in company blog, Jan 6, 2021

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