



US Retail & Ecommerce Snapshot

June 2022

US ecommerce sales are expected to cross the \$1 trillion mark and hit \$1.050 trillion by the end of 2022 with an expected 9.4% growth rate over 2021. Meanwhile, total retail sales are predicted to hit \$6.988 trillion this year. The healthy job market, low unemployment, and wage increases have kept US consumers spending, even in the face of high inflation. eMarketer has created this infographic Snapshot of the US retail market featuring our forecasts for online and offline sales, and a ranking of ecommerce retailers to prepare marketers for the upcoming back-to-school and holiday shopping seasons.

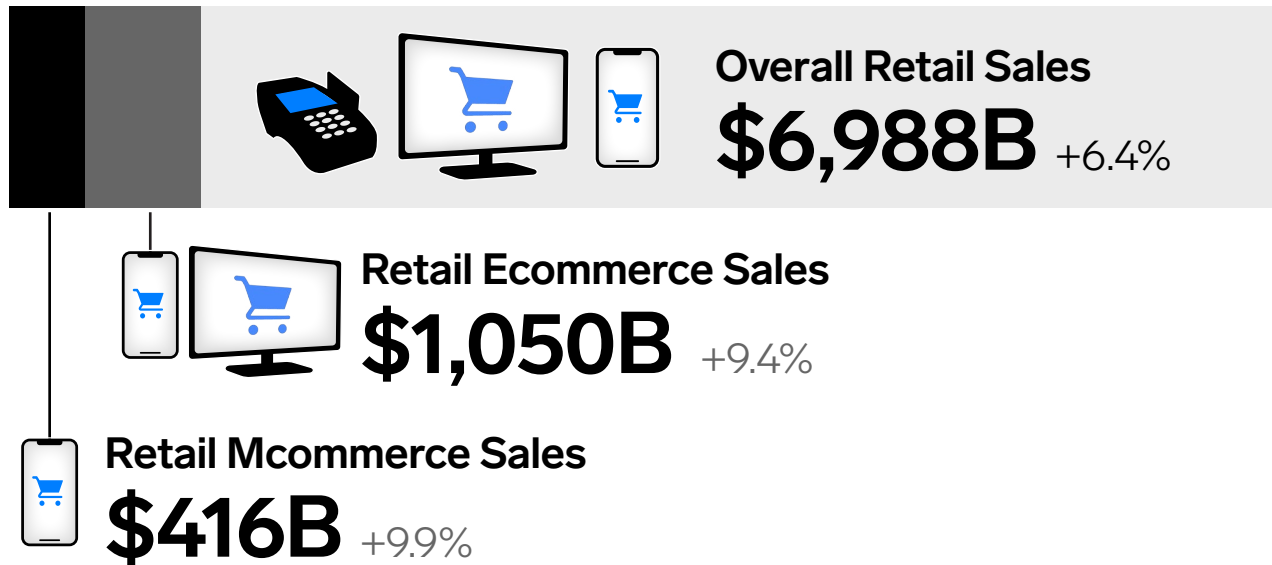
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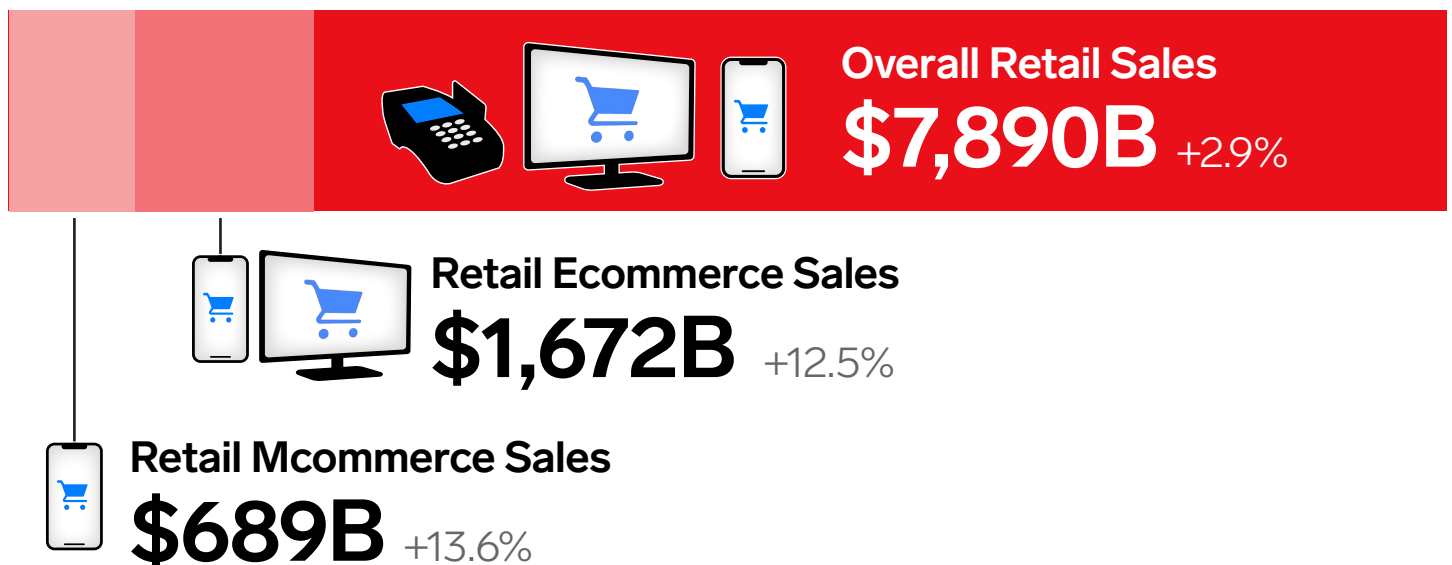
Sizing the US Retail Market, Online and Offline

The habits that consumers have built up over the past two years have taken root, which is why we expect ecommerce to continue to make up a larger share of retail sales this year. We expect retail ecommerce sales to rise 9.4% to \$1.050 trillion. Despite high inflation, consumers have had the means to keep up with the rising costs of essential items like food and household products. But we do anticipate growth to slow in some discretionary categories like apparel, toys and hobbies, and furniture and home furnishing.

2022



2026

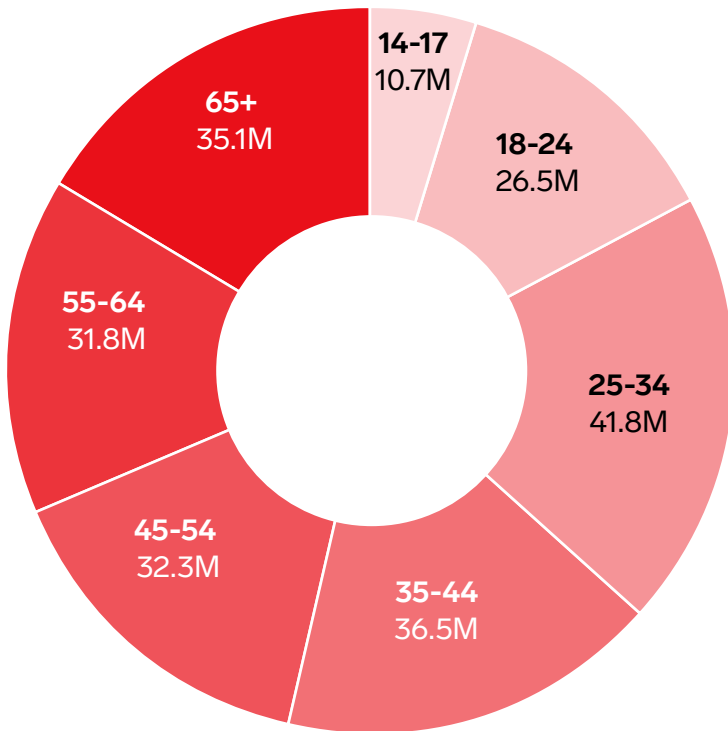


Source: eMarketer, June 2022

Who's Shopping Digitally—and on Mobile?

eMarketer estimates that this year, 238.1 million people in the US ages 14 and older will browse or research products on the internet, though not necessarily make a digital purchase. About 90% of that group will buy something via digital means at least once this year. By 2026, the US digital buyer population will reach 230.6 million.

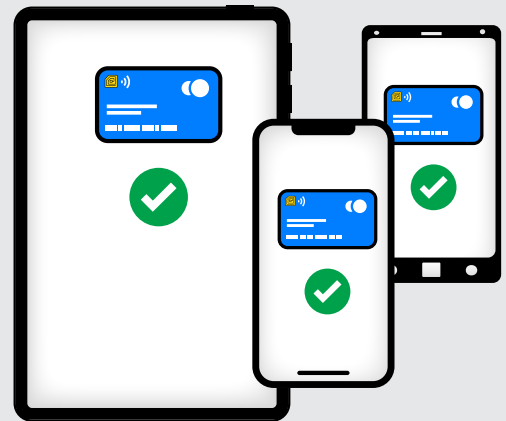
2022 Digital Buyers by Age (millions)



Mobile Buyers (ages 14+, millions)

2022 **182.5**
65.2% of population

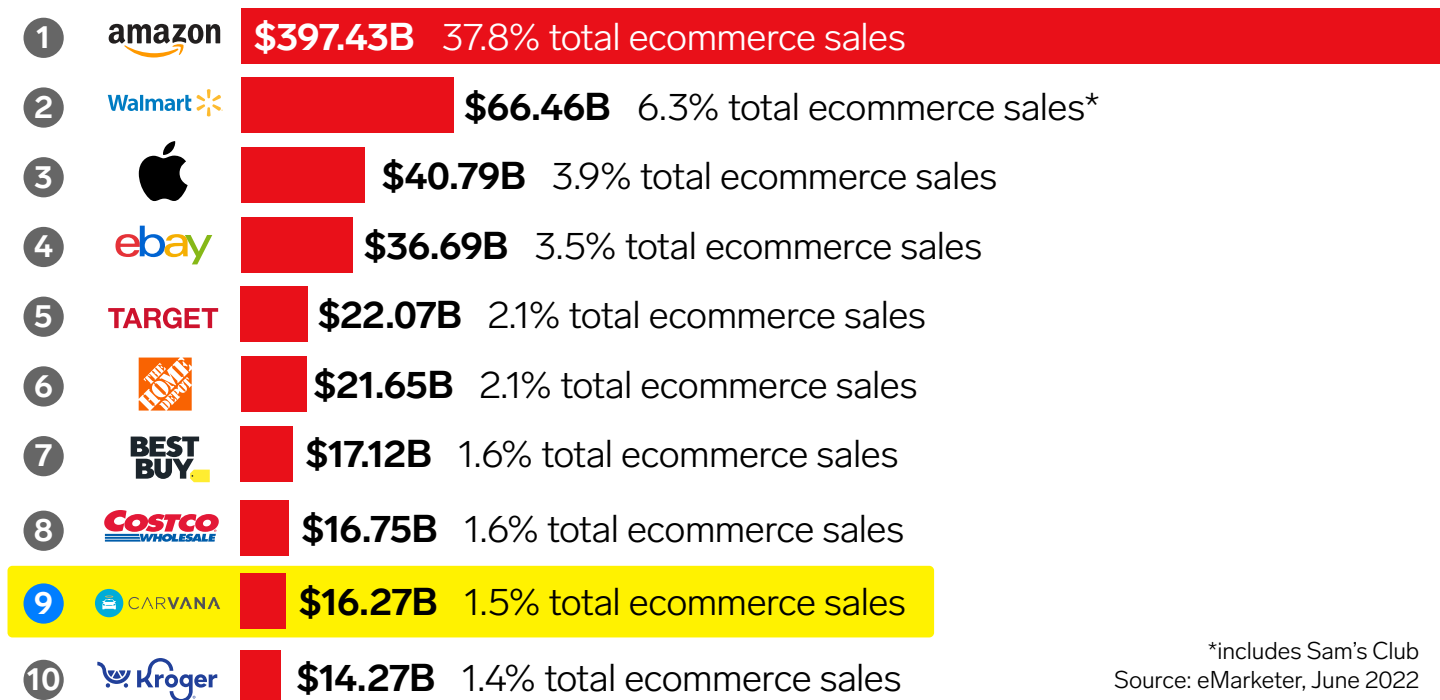
2026 **199.5**
69.2% of population



Source: eMarketer, June 2022

Where Digital Shoppers Are Buying

Amazon will continue its retail ecommerce sales reign with Walmart Inc. in a distant second. But the big story is Carvana. The online car dealer broke into the top 10 biggest digital retailers in 2021, and its speedy growth endures. Carvana is poised to increase sales by 27% to hit \$16.27 billion in 2022, blowing past Target's 11.9% bump and Apple's 13.5% boost.



*includes Sam's Club
Source: eMarketer, June 2022

In the US, direct-to-consumer (D2C) ecommerce sales for established brands will reach \$117.47 billion this year, more than three times larger than those of digitally native brands. Established brands are also now growing faster than digital natives—22.6% versus 17.5%—as leading brands, like Nike, prune retail distribution partners to drive more sales to their owned and operated channels.

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Glossier.



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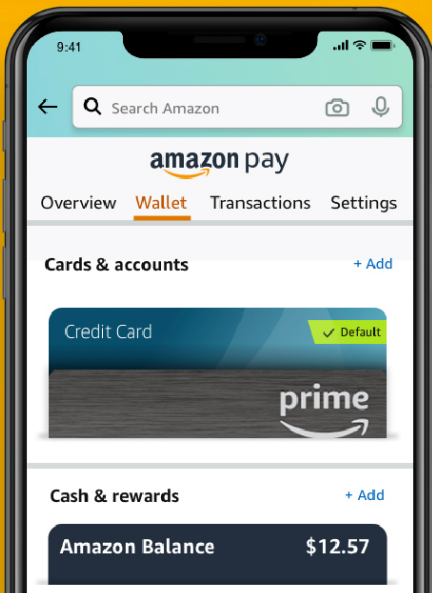
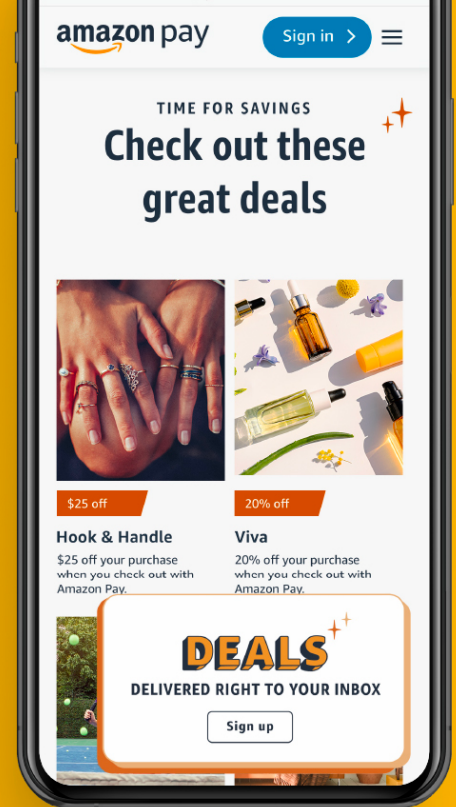
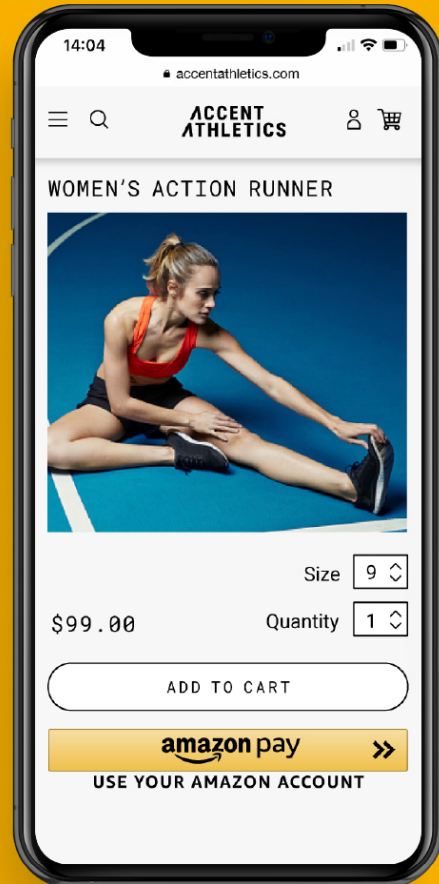
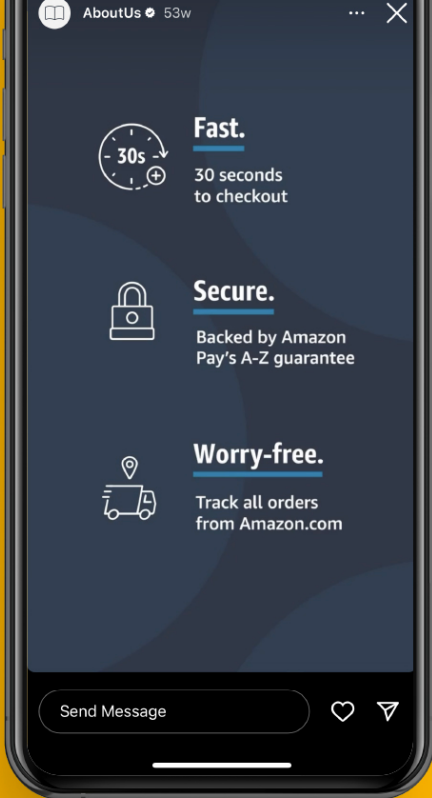
Casper

PELOTON

D2C Ecommerce Sales (billions)

2022	\$117.47 established brands	\$38.22 digitally native brands
2024	\$161.22 established brands	\$51.69 digitally native brands

Source: eMarketer, March 2022



More than a payment button

“The increase we’re seeing in sales conversions from Amazon Pay versus other payment methods is wild, but it’s really not crazy when you think about all the information that is pre-filled with Amazon Pay, and everything is ready to go for the customer.”

Houtan Fanisalek
CTO, Felix Gray

amazon pay

Make it easy for hundreds of millions of Amazon customers to check out on your site.

Let’s go beyond just speed and convenience. Amazon Pay offers a safe and secure checkout experience backed by Amazon’s technology, innovation and robust risk management services. For merchants, Amazon Pay can help reduce the leading causes of cart abandonment, while also making it easier than ever to

integrate voice commerce, optimize for mobile shoppers, and more. For consumers, Amazon Pay allows anyone with an Amazon account to quickly, simply, and securely check out within your brands website.

[Learn how Amazon Pay can grow your business](#)

Back-to-School 2021 Review and Looking Ahead to 2022 Planning

Following last year's huge back-to-school retail boom as students returned to in-person learning, the 2022 back-to-school outlook projects more modest growth. Lower demand for higher ticket laptops and consumer electronics means back-to-school shopping will shift back in the direction of categories like apparel and accessories and office/school supplies.



Source: eMarketer, June 2022

Holiday 2021 Review and Looking Ahead to 2022 Planning

We expect 2022 holiday retail sales to increase 3.3% to \$1.262 trillion, with brick-and-mortar increasing 0.9% to \$1.026 trillion and ecommerce climbing 15.5% to \$235.86 billion. Consumer spending momentum and an extended holiday shopping season should contribute to topline gains, but inflation, supply chain instability, and rising digital ad costs are likely to hit retailers' bottom lines.



Overall

2021 **\$1,221.82B** +16.1%
 2022 **\$1,262.14B** +3.3%



Ecommerce

2021 **\$204.20B** +10.4%
 2022 **\$235.86B** +15.5%



Mcommerce

2021 **\$93.73B** +14.6%
 2022 **\$112.03B** +19.5%

The outlook for the Cyber Five period will further decline in 2022 as we expect recent trends to hold. Cyber Five's share of holiday ecommerce sales will decline from 16.9% to 16.4%, well below the 2019 high-water mark of 20.0%. The "always-on" season—which effectively begins in early October—has given consumers less reason to concentrate their spending around the traditional tentpoles.

Cyber Five 2022 Predictions



Source: eMarketer, February 2022

Retail Marketplace Ecommerce Sales

Despite slowing growth, US marketplace ecommerce sales are expected to hit \$357.26 billion in 2022, making up 34.6% of all online sales.

After a nearly 45% growth during the pandemic in 2020, US marketplace ecommerce sales only grew 16.7% in 2021, and that growth will continue to decelerate to 14.8% this year. Sales will continue to decline through 2024, though it will be a much smaller drop.



eBay, Etsy, Poshmark Source: eMarketer, March 2022
Amazon, Walmart Source: eMarketer, June 2022

eMarketer's Forecast Methodology

eMarketer benchmarks its total US retail sales figures against the US Department of Commerce, for which the last full year measured was 2021. Estimates are based on the analysis of data from benchmark source the US Department of Commerce, estimates from other research firms, historical trends, consumer buying trends, and macro-level economic conditions.

Notes

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Overall Retail Sales: excludes travel and event tickets, payments (such as bill pay, taxes, or money transfers), food services and drinking place sales, and gambling and other vice goods sales

Retail Ecommerce Sales: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments, food services and drinking place sales, and gambling and other vice goods sales

Retail Mcommerce Sales: includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; includes sales on tablets; excludes travel and event tickets, payments, food services and drinking place sales, and gambling and other vice goods sales

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2022 Digital Buyers by Age: ages 14+; digital buyers defined as internet users who have made at least one purchase via any digital channel (including online, mobile, and tablet) during the calendar year

Mobile Buyers: ages 14+; mobile device users who have used their mobile device to make at least one purchase via web browser or mobile app during the calendar year

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Top 10 Retail Ecommerce Sales by Company: represents the gross value of products or services sold on the website of each company listed (via browser or app), regardless of the method of payment or fulfillment; excludes travel and event tickets

D2C Ecommerce Sales: includes products sold by consumer brand manufacturers that sell their products directly to consumers online via their owned and operated sites, bypassing standard distribution channels through a retailer, wholesaler, or third-party platform such as a marketplace; includes digitally native brands and established brands; excludes traditional retailers' private-label brands, travel and event tickets, and food or drink services

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Retail Back-to-School Season Sales: sales are for Jul and Aug of each year among households

with children in K-12 school or college; includes only apparel and accessories, books/music/video, computers, consumer electronics, and office equipment and supplies

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Holiday Season Sales: sales are for Nov and Dec of each year; excludes travel and event tickets, payments (such as bill pay, taxes, or money transfers), food services and drinking place sales, and gambling and other vice goods sales

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Retail Marketplace Ecommerce Sales: represents the gross value of products sold from third-party sellers on a retail marketplace platform; excludes first-party sales on these platforms, travel and event tickets, and food or drink services. An online retail marketplace is a platform that facilitates the sale between a buyer and seller. The marketplace does not own any of the inventory but hosts sellers on their platform, typically for a fee. Sellers manage their own product listings, fulfillment, and customer service

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