



Most Visited Retail Sites, December 2003, U.S.

## Women, Comparison Shopping Help Boost E-commerce Holiday Revenues

By [Laura Rush](#) | [ClickZ Stats staff](#) | January 15, 2004

The statistics from the 2003 holiday shopping season are beginning to come in, and it looks as if the resounding success for the e-commerce industry can be attributed in part to more women shoppers and shopping search engines.

A collaborative eSpending report from [Goldman, Sachs & Co.](#), [Harris Interactive](#), and [Nielsen//NetRatings](#) measured a 35 percent increase over the \$13.7 billion spent during the 2002 holiday season, resulting in \$18.5 billion in online sales. Apparel and clothing were expected to repeat [November's success](#) as the top selling online items with revenue of more than \$3.7 billion, according to the eSpending report, followed by toys and video games at nearly \$2.2 billion. DVDs and videos were expected to claim the most year-over-year growth, at 46 percent.

Popular Online Shopping Categories Ranked by Total Revenue through December 26, 2003			
Category	2003 Holiday Projected Online Revenue in Millions	Year Over Year Growth	
Apparel/Clothing	\$3,738	40%	
Toys/Video games	\$2,197	33%	
Consumer Electronics	\$2,044	2%	
Computer Hardware/Peripherals	\$1,650	----*	
Video/DVD	\$1,619	46%	
*Year-over-year percent growth unavailable for this category dur to small sample size in 2002.			
Source: Goldman Sachs, Harris Interactive and Nielsen//NetRatings eSpending Report, December 2003. Number of respondents=9,517 online users.			

According to research firm [BizRate.com](#), the fourth quarter of 2003 represented exactly one-third of total online sales for 2003, as spending reached a whopping \$18.38 billion. This was a 22 percent increase over the same period in 2002 when \$15.04 billion was spent.

BizRate states that post-holiday clearance sales helped provide an added boost to fourth quarter online sales, as \$879.80 million was spent during the week between Christmas and New Year's Eve.

### Battle of the Sexes

The e-commerce gender gap appears to be widening, as more women opened their purse strings than men last quarter: the percentage of purchases made by women reached 62 percent in the fourth quarter with men accounting for just 38 percent of

transactions. For all of 2003, online purchasing was split 60 percent women and 40 percent men — a 5 percent increase from 2002 where the split was 55 percent women, 45 percent men.

According to BizRate, the top 2003 holiday categories in terms of sales volume were Computer Hardware, Electronics, and Entertainment. However, the Food & Wine (up 58 percent), Gifts & Flowers (up 56 percent), and Apparel (up 38 percent) categories saw the strongest growth over that period.

Reflecting the growing trend of women shoppers, according to BizRate.com's shopping search site, the most searched for brands from November 1 to December 31, 2003 included the following:

1. Canon Powershot A70
2. Louis Vuitton
3. Movado
4. Gucci
5. Louis Vuitton Bags

### **Search Engine Surge**

According to BizRate.com's Online Value Panel Research, one of the reasons why the fourth quarter saw such a boost in sales was because nearly half of online shoppers (49 percent) began their online shopping at a search engine, comparison shopping site, or shopping search site to find deals, whereas 51 percent went directly to a merchant site.

Data from other Internet shopping search engines bolster the argument that comparison shopping was a strong factor behind the successful holiday season. [Shopping.com](#) announced that it served a record number of holiday shoppers, as 76 million individual shoppers used the service to make shopping decisions during the period from the official start of the holiday shopping season, Friday, November 28, 2003, ("Black Friday") to the close of the post-season sale rush, Sunday, January 4, 2004.

According to Shopping.com, the 76 million shoppers represented an 82 percent increase in traffic over the same period in 2002, and generated 38 million new customer leads and an estimated \$237 million in sales for merchants across the Shopping.com Network.

Paralleling BizRate's data on the increase in women shoppers, throughout the second half of 2003, Shopping.com also saw a trend in the adoption of comparison-shopping sites by women. The company estimates that women now make up more than 52 percent of its traffic. As a reflection of this shift in shopper demographics, Shopping.com now features more products in the "Home & Garden" category than it does in consumer electronics, and apparel is its fastest growing category.

According to Shopping.com, the top categories for the 2003 holiday season were:

1. Home and Garden
2. Electronics
3. Clothing and accessories
4. Jewelry and watches
5. Computers

### **E-commerce Sites Get Boost in Overall Traffic**

Competitive intelligence service, [HitWise](#), reports that during the holiday season,

U.S. traffic to shopping Web sites reached its highest point for 2003, with the retail sector accounting for 7.54 percent of all online traffic for December 2003 — a healthy 9.6 percent increase in market share to shopping sites since November 2003, and a 47 percent increase since January 2003.

According to HitWise, the shopping categories that experienced the largest increase in market share of online retail traffic between November and December include:

1. Flowers & Gifts (+27.9 percent)
2. Rewards & Directories (+17.6 percent)
3. Office Supplies (+16.9 percent)
4. Appliances & Electronics (+11.3 percent) and
5. Grocery & Alcohol (+8.8 percent).

The categories that saw a decrease during the holiday season were Wholesale & Relationship Sales (-27.7 percent), Classifieds (-13.3 percent), Automotive (-12.1 percent), House & Garden (-7.2 percent) and Auctions (-6.8 percent).

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<b>Site</b>	<b>Market Share</b>
eBay	26.23%
Amazon.com	4.23%
Yahoo! Shopping	1.76%
Walmart.com	1.76%
BestBuy.com	1.55%
eBay Motors	1.39%
Target	1.20%
Dell Computer	1.19%
Lower My Bills	1.09%
Half.com	0.91%
CircuitCity.com	0.87%
Sears.com	0.83%
eBay Stores	0.78%
BizRate.com	0.76%
Sprint PCS	0.67%
JC Penney	0.64%
Ebates	0.63%
Barnes&Noble.com	0.59%
Hallmark.com	0.56%
QVC.com	0.56%
Source: Hitwise	

Additionally, Hitwise data also shows that 26.5 percent of traffic to e-commerce sites originated from search engines and directories. Hitwise Search Terms Analysis for December reveals that 9 percent of all successful searches on the Web resulted in visits to retail sites — an increase from 8 percent in November.

