SEMRUSH

apptopia

Q4 2020

Digital Shopping Performance Report

With data from mobile apps, web and mobile web

Table of Contents

Introduction

"Unprecedented times" defined 2020. While people grew sick of hearing this phrase, it accurately captured all of the global, economic, and personal firsts we experienced. For many, it was the sudden shift to digital — for work, fun, and everything in between— that transformed our everyday lives the most.

This dramatic shift in behavior, of course, led to unprecedented growth for ecommerce. Instead of wandering into brick-and-mortar businesses, we spent hours window shopping on all corners of the internet. And on holidays, like Black Friday or Diwali, online and mobile sales exceeded all other years' prior.

Even if we were to return to more "precedent times," online/ mobile shopping is likely to remain the primary option for consumers who have discovered the convenience and ease-of-use of digital alternatives.

To illustrate how brands were able to take advantage of the influx of digital consumers, **internet software company SEMrush teamed up with mobile intelligence provider Apptopia. Together, they've identified the top brands, via their websites and mobile apps, for online shopping in Q4 2020.**

Data in this report from both Semrush and Apptopia are estimates. You can find data definitions in the next page and methodology on pages 36 and 37. Semrush is providing website data while Apptopia is providing mobile app data. By combining their datasets, readers will get a uniquely comprehensive understanding of the ecommerce landscape — one which can be leveraged to navigate 2021.

Data Definitions

apptopia

With the exception of data from China, all mobile app data in this report is the combination of performance data from the iOS App Store and Google Play store. Data from China is iOS only.

• Monthly Active Users

This metric is capturing the number of users who opened the app at least once in the last 30 days. This means that a user who opened the app once and a user opened the app 10 times, over the last 30 days, are both only counted as one Monthly Active User.

• Sessions

A session is the opening/launching of a mobile app on a user's phone. If a person opens Instagram four times during a day, that will count as four sessions for that day. Closing out of the app or letting the screen go black are both the end of a session.

• Downloads

This is the number of new users who are downloading the app for the first time. This means that if you break your phone, get a new phone, re-download the same app again – you will only count as one download (i.e. the re-download does not count toward this metric). This also means that app updates do not count toward this number. This is only capturing net new users.

• Stickiest

This is a fun term for our Engagement Index. This is as simple as DAU/MAU. The goal of our Engagement Index is to help you get a feel for how engaged an app's user base is or how frequently they are opening the app. 100 is the highest number an app can achieve in the index. For example, a scoring of "50" means that users are opening the app once every two days.

Data Definitions

SEMRUSH

Using Semrush **Traffic Analytics** and **Market Explorer** tools, we have collected and analyzed the web traffic data of more than 1,000 of the world's most visited ecommerce websites across several categories.

• Unique visitors

This metric is an estimate of how many unique individuals have entered a specific website.

Unique visitor data in the Top Charts is a sum of all of the brand's web domains. For example, Best Buy is comprised of bestbuy.com and bestbuy.ca.

• Total visits

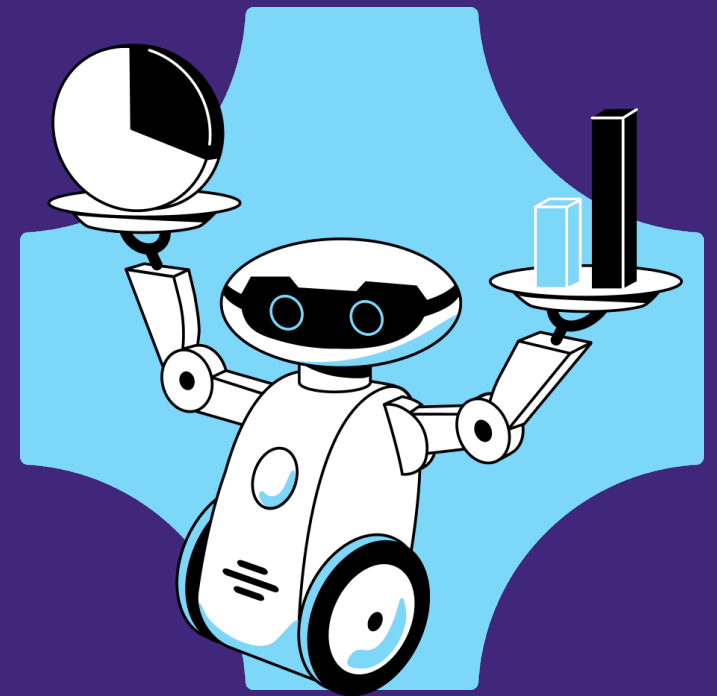This metric is an estimate of total visits to the website over the specified period of time.

• Market

A market represents the top 1000 ecommerce domains analyzed in a particular country.

Top Charts

The best performers in Q4 2020
across the globe and the United States

Top Retailers by Digital Performance in Q4 2020, Worldwide

2020, and Q4 in particular, was about **finding the best deal and getting everything you need from one place — a trend that favored large superstore-like businesses.** Unsurprisingly, Amazon dominated globally both on the web and via mobile app. The wide range of products available, from food to tech gadgets, as well as their shipping convenience, make it an obvious choice for quarantine shoppers. eBay, a C2C (consumer-to-consumer) marketplace app, has also landed itself at the top of the list. The company likely benefited from the re-selling of goods that were in shortage during the pandemic as well as the growing trend to declutter.

Top Retailers by Digital Performance in Q4 2020, Worldwide

Overall		App		Desktop		Mobile Web	
Amazon	1.9B	Amazon	220M	Amazon	644M	Amazon	1B
eBay	464M	Shopee	50M	Apple	160M	eBay	307M
Walmart	419M	SHEIN	46M	eBay	146M	Walmart	225M
Apple	304M	Pinduoduo	38M	AliExpress	101M	Samsung	166M
Mercado Libre	235M	Flipkart	32M	Walmart	83M	Mercado Libre	149M
AliExpress	233M	Taobao Special	26M	Mercado Libre	65M	Apple	144M
Samsung	207M	AliExpress	25.5M	Etsy	60M	Rakuten	130M
Shopee	196M	Lazada	24M	Rakuten	52M	Etsy	115M
Rakuten	185M	Mercado Libre	21M	Shopee	44M	AliExpress	106M
Etsy	178M	Taobao	18M	Best Buy	43M	Shopee	102M

App data is average monthly active users, Desktop and Mobile web data is average monthly unique visitors, and the Overall category combines those numbers.

Top Retailers by Digital Performance in Q4 2020, United States

In the US, Walmart is second only to Amazon. This superstore is a go-to for deals year round, but was of particular interest in Q4, as new gaming releases dominated our attention. The same applies to Best Buy, which saw record growth year-over-year in the four quarter. Its app recorded its highest number of daily downloads in its lifetime, as gamers anxiously awaited the availability of the PlayStation 5.

Top Retailers by Digital Performance in Q4 2020, United States

Overall		App		Desktop		Mobile Web	
Amazon	561M	Walmart	110M	Amazon	181M	Amazon	290M
Walmart	300M	Amazon	90M	Apple	63M	Walmart	138M
Target	121M	Target	17M	eBay	54M	eBay	121M
Etsy	110M	Shop	9M	Walmart	52M	Target	73M
Best Buy	95M	SHEIN	7M	Etsy	36M	Etsy	72M
Kohl's	46M	Nike	4.77M	Best Buy	32M	Best Buy	61M
AliExpress	44M	OfferUp	4.73M	AliExpress	31M	Apple	45M
Samsung	43.3M	Fetch	4.72M	Target	30.9M	Kohl's	34M
Macy's	43M	eBay	4.3M	Macy's	11M	Samsung	33M
Walgreen's	40M	Poshmark	4.27M	Newegg	10.7M	Macy's	31M

App data is average monthly active users, Desktop and Mobile web data is average monthly unique visitors, and the Overall category combines those numbers.

Shopping App Download Leaders

App downloads, or net new installs, are a measure of new users coming into a brand's digital net. A download is a conversion on its own— it means a threshold of intrigue has been met and an individual has taken the time and effort (and sacrificed their phone's memory) to install the app on their phone. **Downloads represent interest in the brand, but more importantly, the opportunity for the ultimate conversion: dollars spent.**

Notably, most of these global leaders do not have physical locations. Shopee and Lazada perform well in Southeast Asia; Flipkart in India; Pinduoduo and Taobao in China; Amazon, WISH, SHEIN, and AliExpress all perform well globally. In the US, the usual suspects are present, plus a newer top performer, Shop. Shop is owned by Shopify, and can be used to track packages or browse products from Shopify merchants.

Q4'20 Worldwide Shopping Download

Amazon		51M
Shopee		43M
SHEIN		37M
Flipkart		33M
Wish		31M
Pinduoduo		29M
Lazada		22M
Taobao Special		21M
AliExpress		18M
Taobao		17M
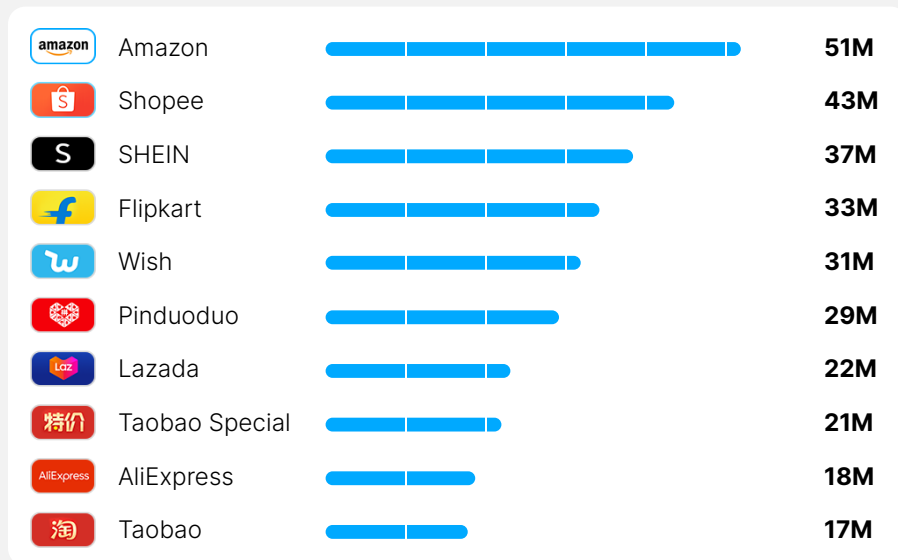
Q4'20 United States Shopping Download

Walmart		12M
Amazon		11M
Shop		8M
OfferUp		6.1M
Target		5.8M
Wish		5.7M
SHEIN		5.2M
eBay		4.7M
Nike		4.6M
Klarna		4.4M
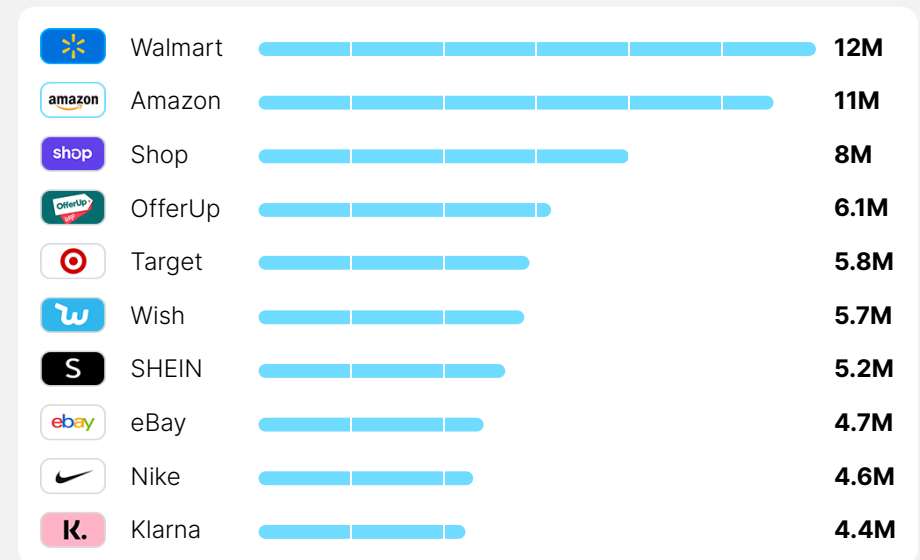
Total App Downloads of the Shopping Category

In Q4 2020, Shopping apps were downloaded 16.7% more globally and 18.3% more in the US, year-over-year. Quarter-over-quarter, Shopping apps were downloaded about 10% more globally and 9% more in the US. Many downloads came from people being forced to shop online for the first time due the closure of brick-and-mortar stores. This strong YoY growth signals continued and growing interest in digital retail solutions.

Shopping Category Downloads, App Store + Google Play, Worldwide

Q419	Q120	Q220	Q320	Q420
1.52B	1.33B	1.55B	1.61B	1.78B
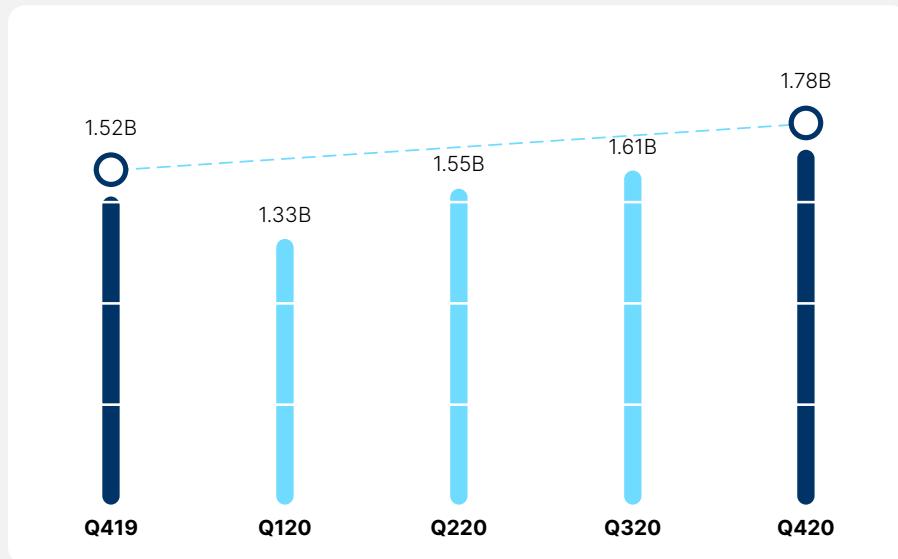
YoY Growth **16.7%**

Shopping Category Downloads, App Store + Google Play, United States

Q419	Q120	Q220	Q320	Q420
219M	207M	250M	238M	259M
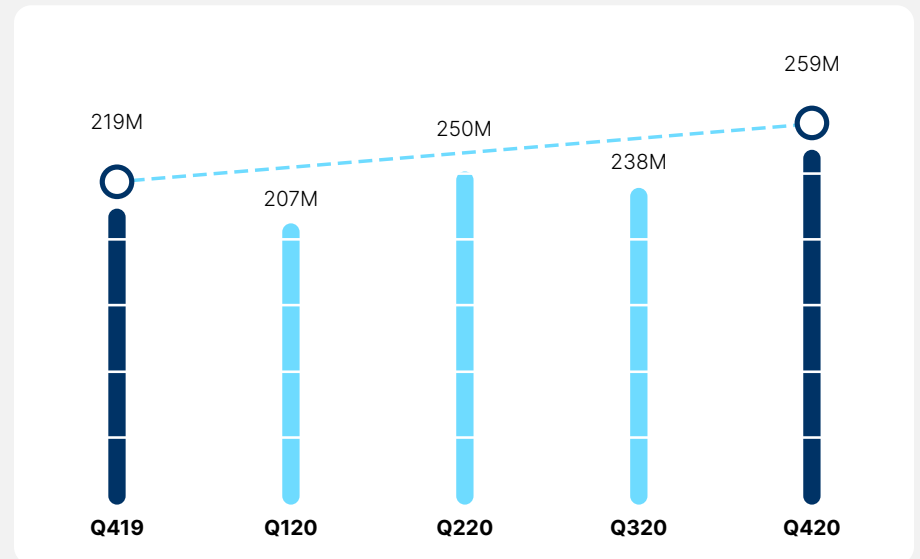
YoY Growth **18.3%**

Top Countries by Shopping App Sessions

The top five countries by mobile app sessions of Shopping apps have remained the same in Q4 2020 as they were in Q4 2019.
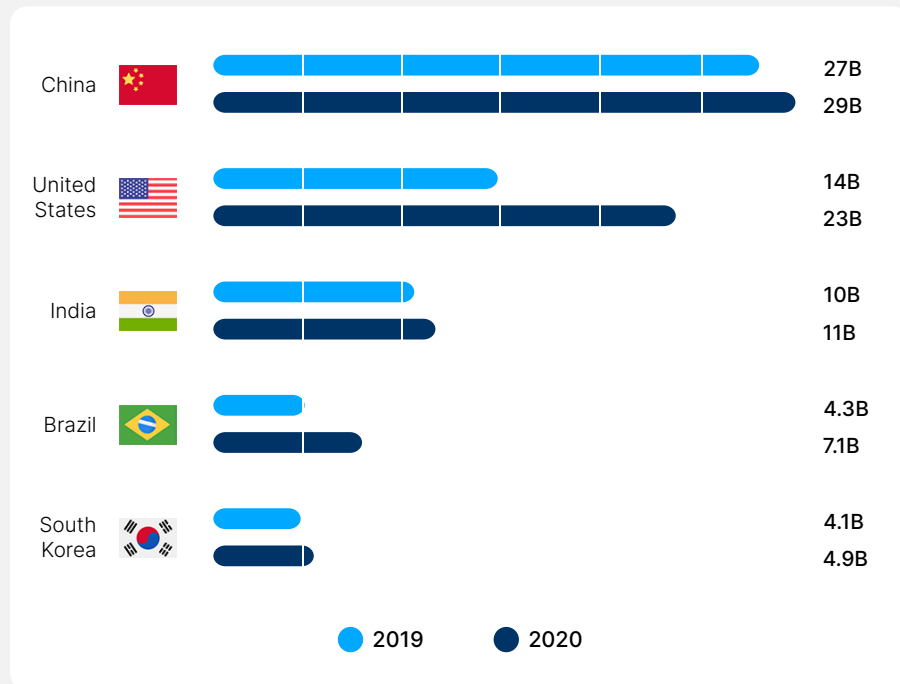
Chinese consumers out-shopped all others, racking up more than 28 billion Shopping app sessions. China's mobile Shopping performance is especially impressive as this data is iOS only and does not account for all other app stores used in the country. Consumers in Brazil and the US, however, increased their shopping the most. Shopping app sessions increased 66.3% in Brazil and 65.9% in the US, YoY.

Country		2019	2020
China	🇨🇳	27B	29B
United States	🇺🇸	14B	23B
India	🇮🇳	10B	11B
Brazil	🇧🇷	4.3B	7.1B
South Korea	🇰🇷	4.1B	4.9B

● 2019 ● 2020

Top Ecommerce Websites, Worldwide

Total Q4 traffic shows the total number of times a certain website has been visited. This metric helps to track website growth over time. Amazon is the largest ecommerce site on the planet with four of its regional domains entering the top 10 most visited ecommerce websites globally.

Of the non-Amazon sites, Japanese-based Rakuten and US-based eBay can be found at the top of the chart. Walmart, Samsung, and Aliexpress appear to have actually decreased their website visits YoY. However, it's possible the decline in website usage could be a result of people opting to use the mobile app instead of the website.

Top 10 Ecommerce Websitesby traffic, Worldwide

		Q4'19	Q4'20
amazon	amazon.com	10.42B	12.39B
Rakuten	rakuten.co.jp	2.11B	3.96B
amazon	amazon.co.jp	2.15B	3.88B
ebay	ebay.com	3.06B	3.38B
amazon	amazon.de	2.34B	2.63B
amazon	amazon.co.uk	1.90B	2.09B
🍎	apple.com	1.73B	2.03B
✳	walmart.com	1.91B	1.87B
SAMSUNG	samsung.com	1.86B	1.75B
AliExpress	aliexpress.com	1.99B	1.64B
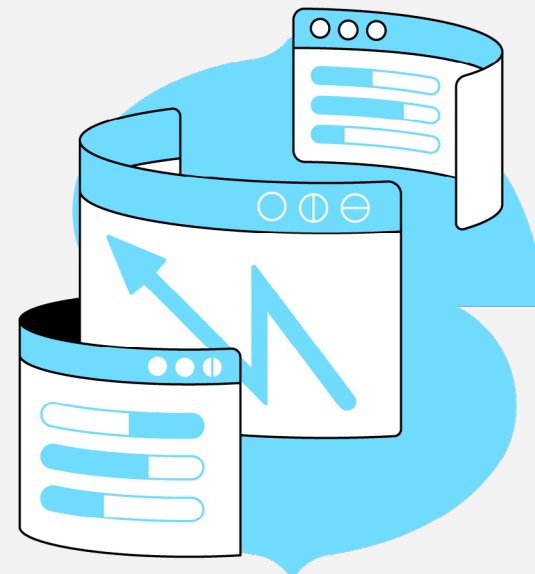
Top Ecommerce Websites, US

In the US, Amazon also takes the #1 spot as the most visited ecommerce website. The site even increased visits 24.4% YoY, showing that this giant will not slow down anytime soon.

Etsy grew visits at an impressive 32% YoY, making this business one to watch as the homemade/small business market continues to gain traction.

Wayfair shows solid growth of +38% YoY, a result of home renovations during the pandemic. Home Depot and Lowe's also appear on this chart for that reason.

Top 10 Ecommerce Websites by traffic, USA

		Q4'19	Q4'20
amazon	amazon.com	8.01B	9.96B
ebay	ebay.com	2.06B	2.54B
walmart	walmart.com	1.81B	1.78B
Etsy	etsy.com	649.5M	858.6M
Home Depot	homedepot.com	692.5M	902.7M
bestbuy	bestbuy.com	717.9M	777.3B
target	target.com	775.3M	768.5B
apple	apple.com	565.2M	766.9B
Lowe's	lowes.com	427M	522.2B
wayfair	wayfair.com	292.9M	406.9B

Top Five Ecommerce Websites by Total Visits in Q4 2020, Regional data

United Kingdom

		Q4'19	Q4'20
amazon	amazon.co.uk	1.60B	1.75B
ebay	ebay.co.uk	986.4M	1.11B
Argos	argos.co.uk	310.8M	345.7M
currys	currys.co.uk	138.7M	155.9M
amazon	amazon.com	168.6M	157.6M

India

		Q4'19	Q4'20
amazon	amazon.in	1.43B	1.31B
flipkart	flipkart.com	628.7M	631.2M
amazon	amazon.com	236.1M	219.7M
M	myntra.com	145.9M	172.6M
SAMSUNG	samsung.com	108.9M	100.2M

Germany

		Q4'19	Q4'20
amazon	amazon.de	1.99B	2.20B
ebay	ebay.de	650.4M	805.4M
SAMSUNG	samsung.com	255.1M	232.4M
OTTO	otto.de	172.5M	204.1M
idealo	idealo.de	187.3M	196.3M

France

		Q4'19	Q4'20
amazon	amazon.fr	927.8M	1.13B
C	cdiscount.com	258.3M	380.2M
fnac	fnac.com	157.5M	187.1M
ebay	ebay.fr	154.4M	200.2M
LEROYMERLIN	leroymerlin.fr	90.8M	177.4M

Web Traffic Analysis

Ecommerce traffic sources and audience characteristics

Discovering the Key Traffic Drivers for Ecommerce Growth

As more and more people shift their buying activity to online, it's important to keep an eye on the different channels that businesses are using to drive traffic to their websites.

Of the domains analyzed, direct traffic accounted for almost 50% of website traffic on the market, on average, in Q4. Direct is followed by Search with 30% and Referral with 14%. Social Media brought in the least amount of traffic for ecommerce sites.

Traffic Sources: Top 5 Ecommerce Websites vs Market,US

Legend: ● Direct ● Search ● Referral ● Paid ● Social
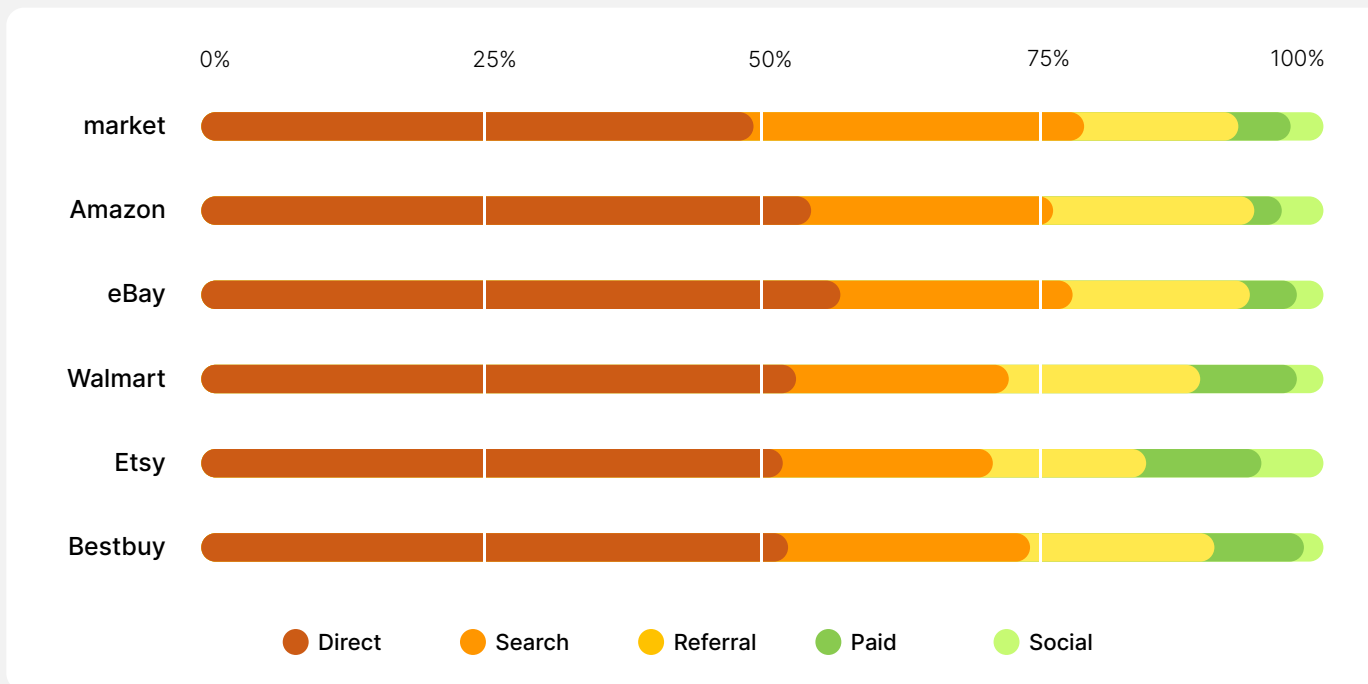
Discovering the Key Traffic Drivers for Ecommerce Growth

The most significant YoY change we can see is the large increase of traffic generated from social channels (over +30%). While social networks are only responsible for 2.4% of all traffic generated, they have become increasingly popular advertising channels for businesses. Instagram, for instance, has even updated their app to include a 'Shop' tab, making it easier for consumers to engage with— and purchase from— the brands they follow.

We also see a minor drop (-7%) in traffic generated through search traffic. The drop in search traffic may indicate an increase in competition in organic channels which, in turn, makes it more difficult to rank higher.

Share of channel, Q4'19

Channel	Share
🔴 Direct	**48.5%**
🟠 Referral	**12.8%**
🟡 Social	**1.8%**
🟢 Search	**32.2%**
🟢 Paid	**4.7%**

Share of channel, Q4'20

Channel	Share
🔴 Direct	**49.3%**
🟠 Referral	**14.0%**
🟡 Social	**2.4%**
🟢 Search	**29.8%**
🟢 Paid	**4.5%**

YoY change, %

Direct ⬆ 1.6%	Referral ⬆ 9.4%	Social ⬆ 30.7%	Search ⬇ -7.2%	Paid ⬇ -3.4%

17
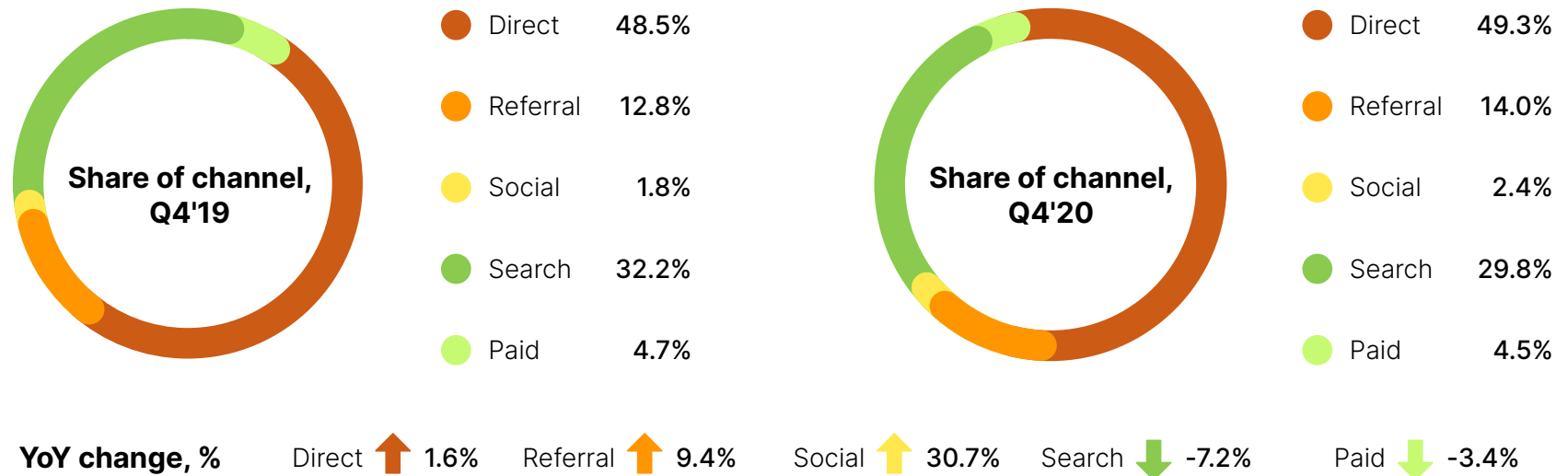
Social Media Traffic Share

While social media brings comparably less traffic than other channels to ecommerce websites, there are some interesting differences across social networks that should be noted.

• Facebook is the leader when it comes to driving traffic. The social network is responsible for about 40% of social media visits for ecommerce brands.

• Video content performs well. YouTube has a similar impact to Facebook, driving over 35% of visits.

• The two giants are neck-and-neck each year, but YouTube may surpass Facebook soon. While Facebook lost almost 10% of its audience, YouTube gained 7%. Given the rise in popularity of influencers and vloggers, this makes sense.

• We also see a small increase in Reddit traffic share and a decrease in traffic share for Twitter.

Traffic from social media, Q4'19, US

● Facebook	**50.0%**
● Youtube	**28.1%**
● Instagram	**3.5%**
● Twitter	**8.3%**
● Pinterest	**5.0%**
● Reddit	**3.8%**

Traffic from social media, Q4'20, US

● Facebook	**40.2%**
● Youtube	**30.5%**
● Instagram	**3.2%**
● Twitter	**10.1%**
● Pinterest	**5.0%**
● Reddit	**5.0%**
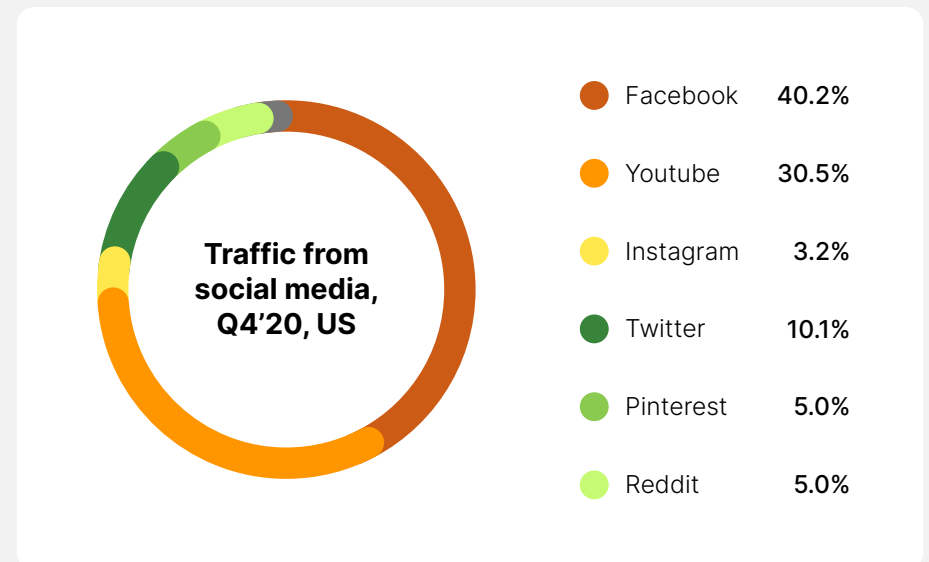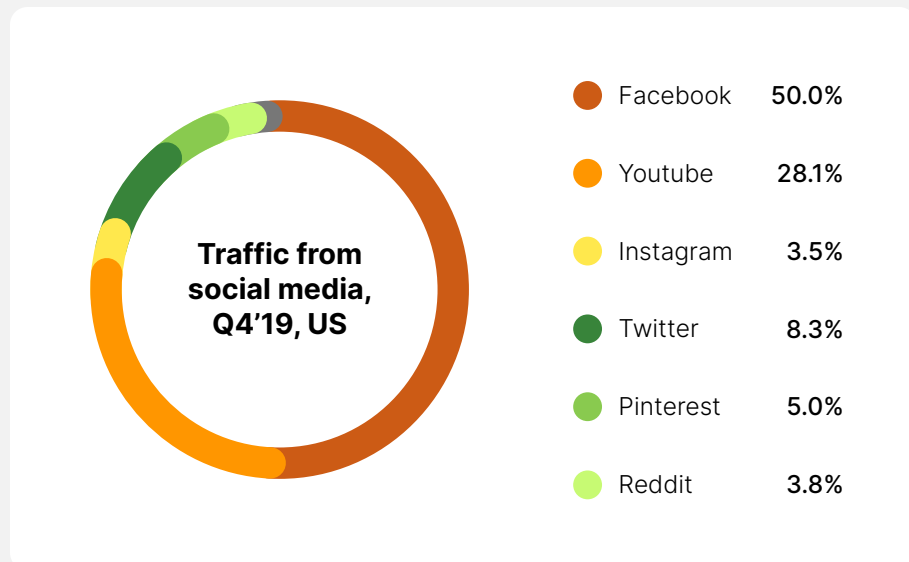
Audience Characteristics

While it's useful to know *how* your visitors got to your website, **it's even more useful to know *who* they are.** With a clear understanding of your site's current user demographics, you can create more targeted and effective marketing campaigns to continue to increase traffic.

The top five ecommerce websites appear to lean more heavily male than female (except Etsy), and within the age range of 25-34 years old.

Top 5 Ecommerce websites age distribution, US

- ● amazon.com
- ● ebay.com
- ● walmart.com
- ● etsy.com
- ● bestbuy.com
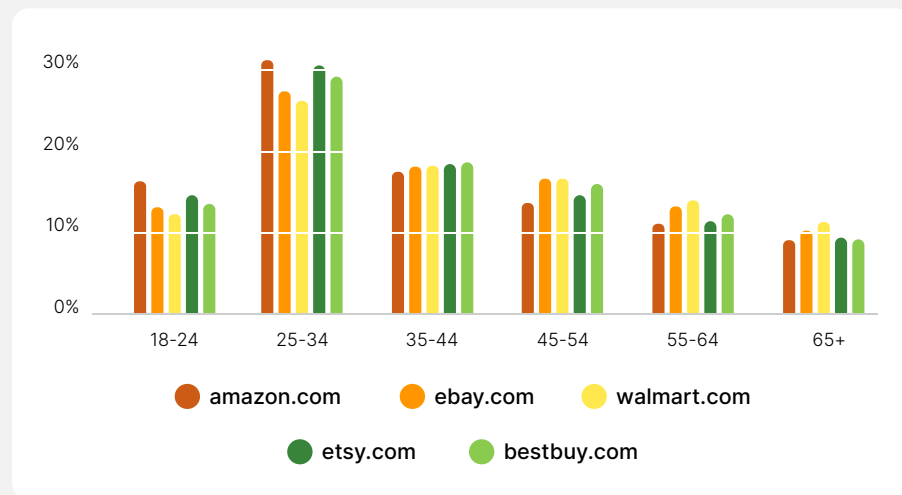
Top 5 Ecommerce websites gender distribution

- ● Male
- ● Female
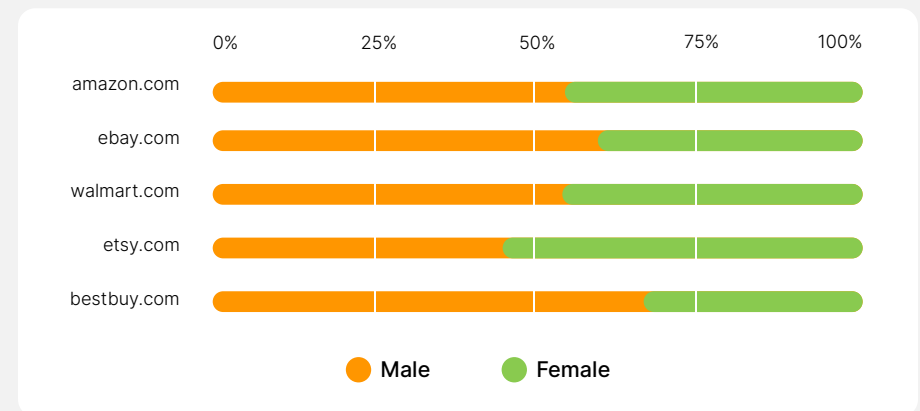
Popular Retailer Market Segments in the United States

A closer look at select market segments for their top performers, fastest growers and more

Top Brick-and-Mortar Retailer Apps, US

• Walmart was the most downloaded app of the quarter in the US, recording almost 12 million downloads, about 100% more than Target which ranked second.

• Belk started seriously increasing new users in May. The app increased convenience for its customers viafree curbside and in-store pick up. Within the app, UI changes took place to give shoppers the ability to easily filter search results for items available for those services. It also claims it made it quicker for shoppers to get to the coupon screen.

• The home improvement trend spurred by the pandemic is illustrated again here as the country's top two home improvement stores were found to be two of the fastest growing brick-and-mortar mobile apps.

Top Brick-and-Mortar Retailer Apps
Quarterly downloads, US
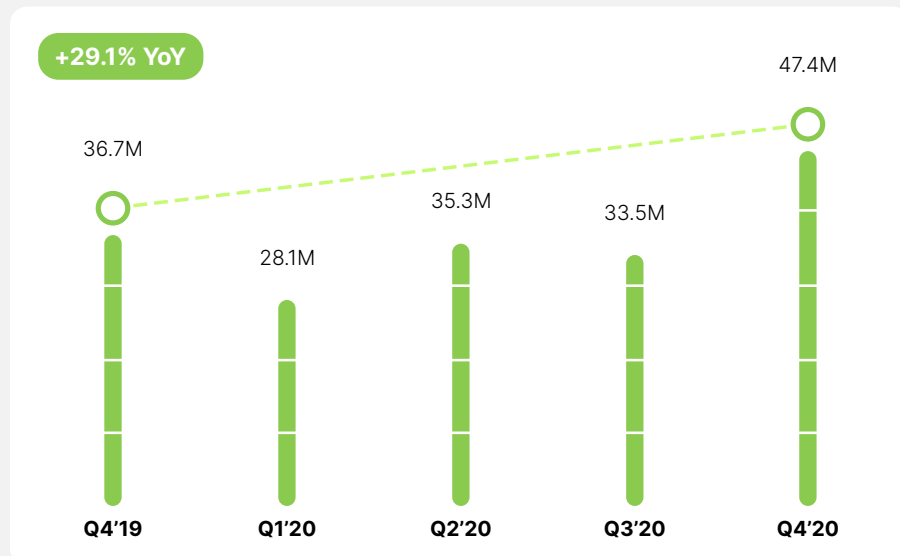
+29.1% YoY

36.7M	28.1M	35.3M	33.5M	47.4M
Q4'19	Q1'20	Q2'20	Q3'20	Q4'20

Fastest Growing Brick-and-Mortar Retailer Apps
Year-over-year percentage growth by MAU, US

belk	Belk	179%
Lowe's	Lowe's	133%
BJ's	BJ's Wholesale Club	114%
Best Buy	Best Buy	99%
The Home Depot	The Home Depot	86%
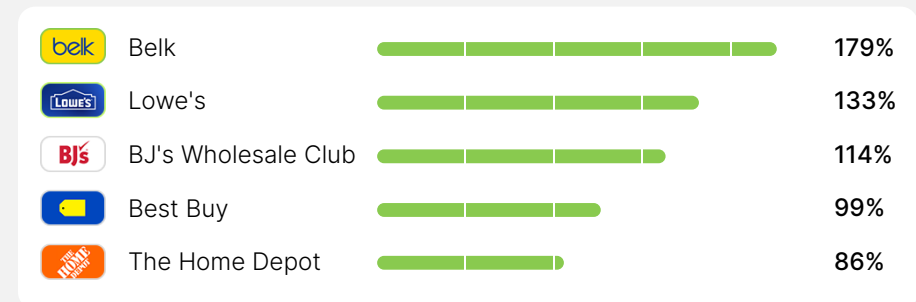
Top Brick-and-Mortar Retailer Websites, US

• The top Brick-and-Mortar retailer websites grew visits 4.8% YoY.

• Walmart's website was the most popular of the market, recording about 569 million visits in Q4.
Home Depot takes the #2 spot with about 335 million visits.

• Ikea had an exceptional year in the US, growing website visits 79% YoY.

• Like Ikea, Home Depot and Lowes grew in popularity as the pandemic spurred an increase in home improvements and renovations.

Total quarterly visits of top brick-and-mortar retailer websites
Quarterly visits, US
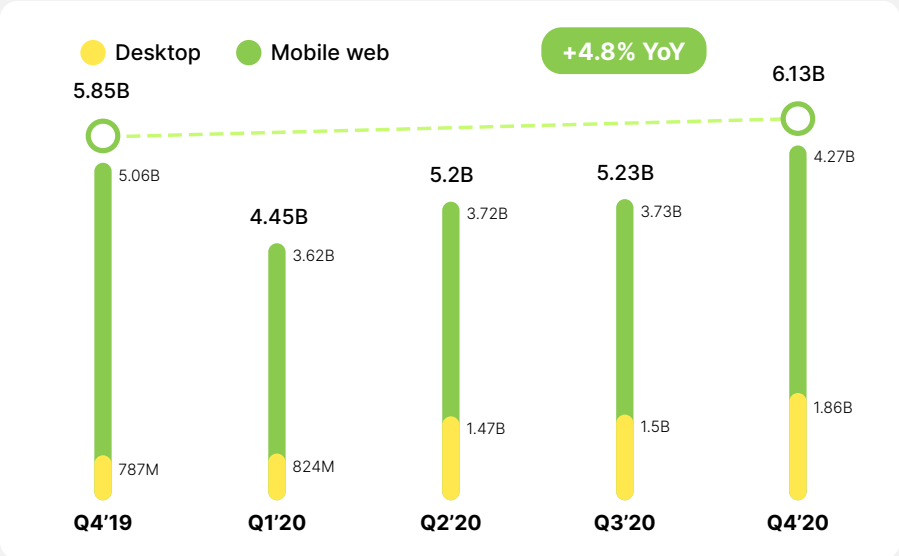
Desktop   Mobile web   +4.8% YoY

5.85B
5.06B
787M
Q4'19

4.45B
3.62B
824M
Q1'20

5.2B
3.72B
1.47B
Q2'20

5.23B
3.73B
1.5B
Q3'20

6.13B
4.27B
1.86B
Q4'20

Fastest Growing Brick-and-Mortar Retailer Websites
Year-over-year percentage growth
by Total Visits, US

IKEA	ikea.com	79%
COSTCO	costco.com	31%
THE HOME DEPOT	homedepot.com	30%
BJ's	bjs.com	28%
LOWE'S	lowes.com	22%
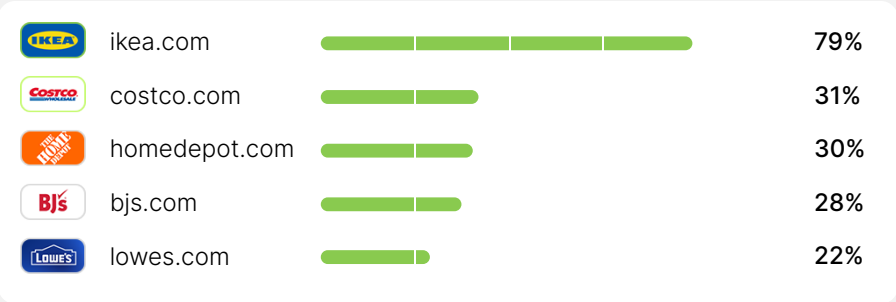
Top 'Buy Now, Pay Later' Apps, US

• 'Buy Now, Pay Later' (BNPL) apps experienced their best quarter yet, increasing installs 135.7% YoY, more than any other retailer segment in this report. Economic stability and job security declined, making the need for paying via installments that much greater.

• As the second oldest app of the market, Klarna (Affirm is the oldest) dominates with a large percentage of market share. Quadpay and Sezzle are fairly new entrants, having both launched in March 2019.

• Despite being the top player via performance metrics, Klarna's user reviews registered our lowest sentiment score of all the apps, with only 50% of its reviews being labeled as "positive." In comparison and at the top, 92% of Sezzle's Q4 reviews were positive.

Top 'Buy Now, Pay Later' Apps
Quarterly downloads, US

+135.7% YoY

9.93M

4.21M

3.36M

3.11M

4.48M

| Q4'19 | Q1'20 | Q2'20 | Q3'20 | Q4'20 |
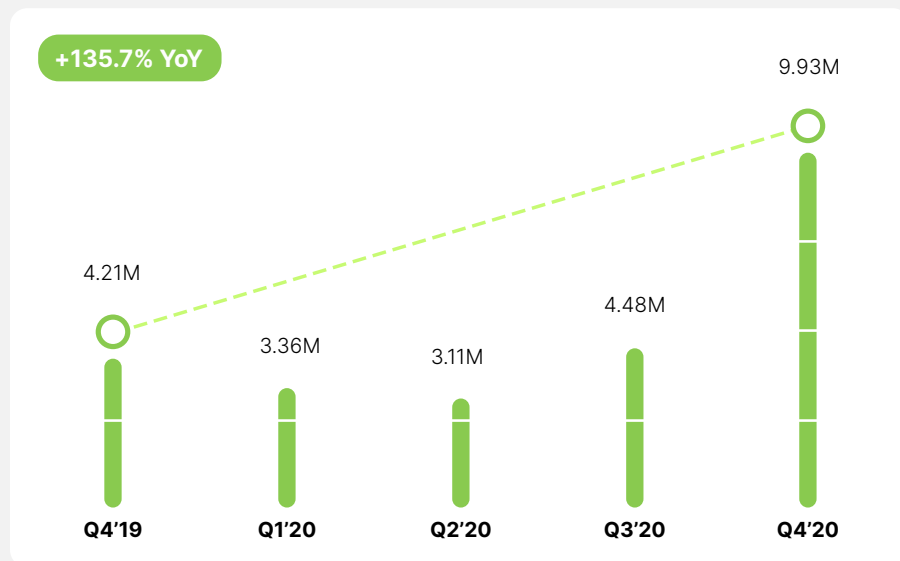
Q4'20 Market Share of 'Buy Now, Pay Later' Apps
Market share is by Average Q4'20 MAU, US

K.	Klarna	45%
	Afterpay	23%
q	Quadpay	13.6%
a	Affirm	13.2%
	Sezzle	5.2%

Top 'Buy Now, Pay Later' Websites, US

• Of the domains we analyzed, BNPL sites, like their respective apps, saw some of the biggest increases in website visits YoY.

• Affirm was the most visited BNPL site of the market in the US in Q4, followed by Afterpay.

• Klarna, despite being the largest BNPL app, comes in as the third most visited site of this market. Its users clearly prefer the mobile app version to the website version.

Total quarterly visits of top 'Buy now, Pay later' websites
Quarterly visits, US

● Desktop ● Mobile web   **+46.5% YoY**

	Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
Total	44M	41.3M	52.68M	58.54M	64.46M
Mobile web	36.82M	33.94M	41.71M	45.37M	48.86M
Desktop	7.17M	7.34M	10.96M	13.17M	15.6M
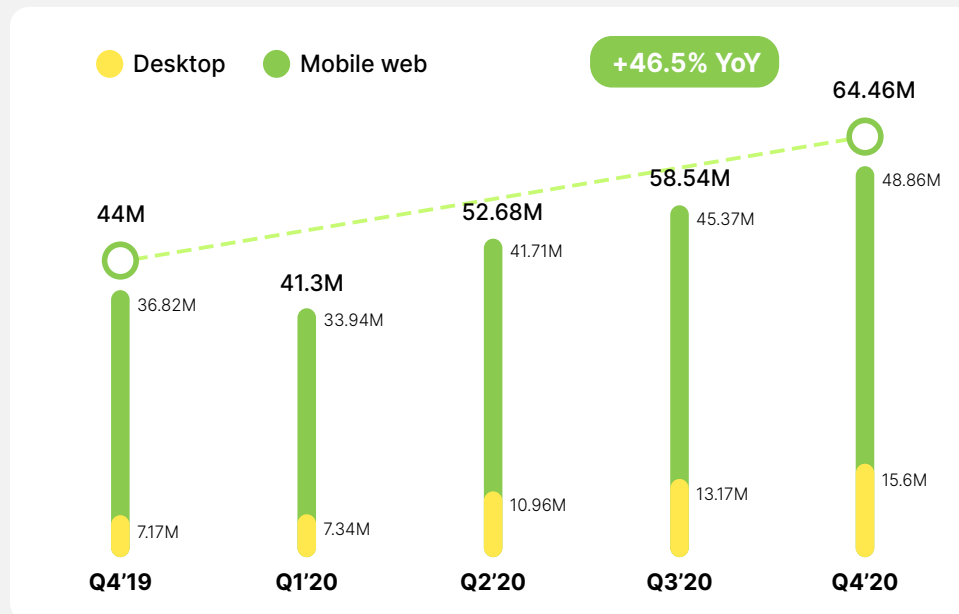
Fastest Growing 'Buy Now, Pay Later' Websites
Year-over-year percentage growth by Total Visits, US

Sezzle		110%
QuadPay		85%
Klarna		82%
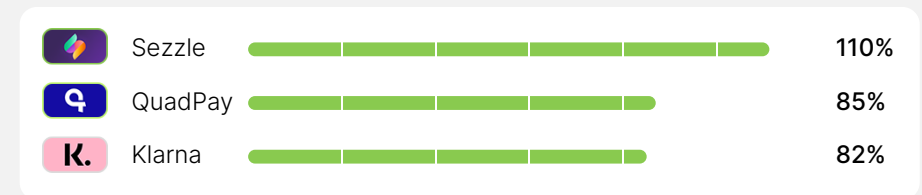
Top C2C Buy/Sell Marketplace Apps, US

• Consumer-to-consumer marketplace apps largely benefited from 2020 trends like the "Marie-Kondo effect" where people rid themselves of items that do not bring them joy.

• As we mentioned previously, people also likely gravitated to these apps to find deals or second-hand prices, as economic uncertainty troubled many Americans.

Top C2C Buy/Sell Marketplace Apps
Quarterly visits, US

+12.9% YoY

Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
21.57M	24.07M	26.73M	28.18M	24.35M
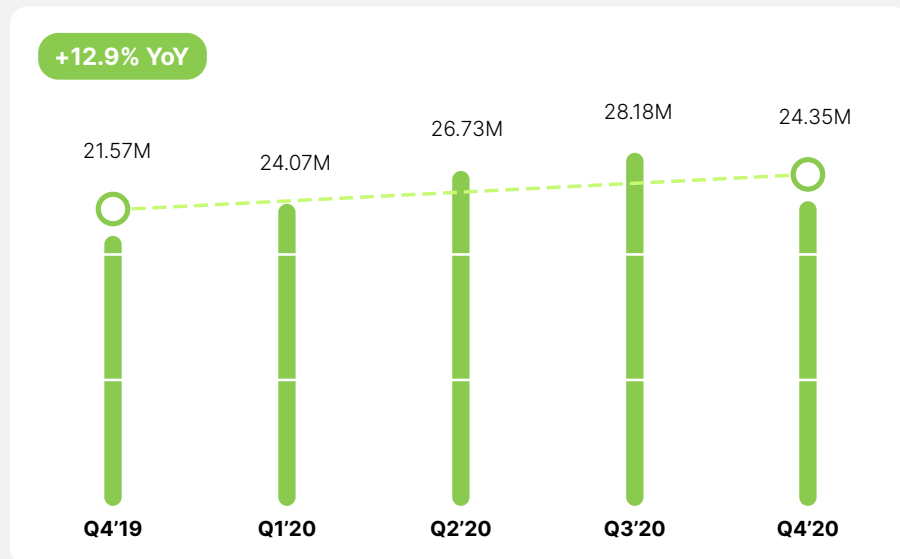
Top C2C Buy/Sell Marketplace Apps, US

• 2020 was arguably a breakout year for Etsy, as handmade goods (a lot of masks!) made it to the forefront of quarantine interests.

• OfferUp, having merged with Letgo, appears to be winning the C2C war, proving to be "stickier" — and more downloaded— than competitors, like eBay or Mercari.

Stickiest C2C Buy/Sell Marketplace Apps

	App		Value
OfferUp	OfferUp		92.57%
eBay	eBay		92.55%
Etsy	Etsy		92.4%
Poshmark	Poshmark		38.9%
V.	Vestiaire Collective		38.1%
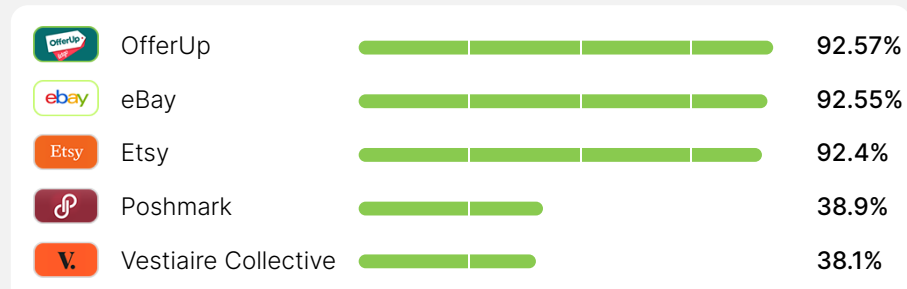
Fastest Growing C2C Buy/Sell Marketplace Apps
Year-over-year percentage growth by MAU, US

	App		Value
	Craigslist		903%
V.	Vestiaire Collective		530%
Etsy	Etsy		98%
OLX	OLX		69%
d	Depop		61%
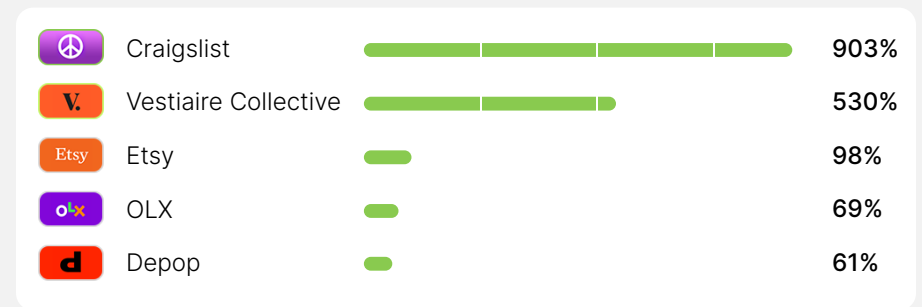
Top C2C Buy/Sell Marketplace Websites, US

• The top C2C Buy/Sell Marketplace websites increased total visits 17.2% and desktop visits over 100% YoY in the US.

• Mobile website visits declined YoY, but this is likely because apps are the default mobile option, and desktop is the default website option, as both provide optimal user experiences.

• Of this market, Ebay, then Etsy, were the most visited sites.

• Rebag, the fastest growing of the market, is an app that specializes in the reselling of designer handbags and accessories. Considering that "Birkin" bags made it into a lot of headlines, song lyrics, and influencer Instagram stories this year, this app's rise in popularity checks out.

Total quarterly visits of top C2C Buy/Sell Marketplace websites
Quarterly visits, US

Legend: ● Desktop ● Mobile web

+17.2% YoY

	Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
Total	4.59B	4.56B	5.14B	5.15B	5.38B
Mobile web	3.67B	3.47B	3.45B	3.31B	4.27B
Desktop	926M	1.08B	1.69B	1.84B	1.87B
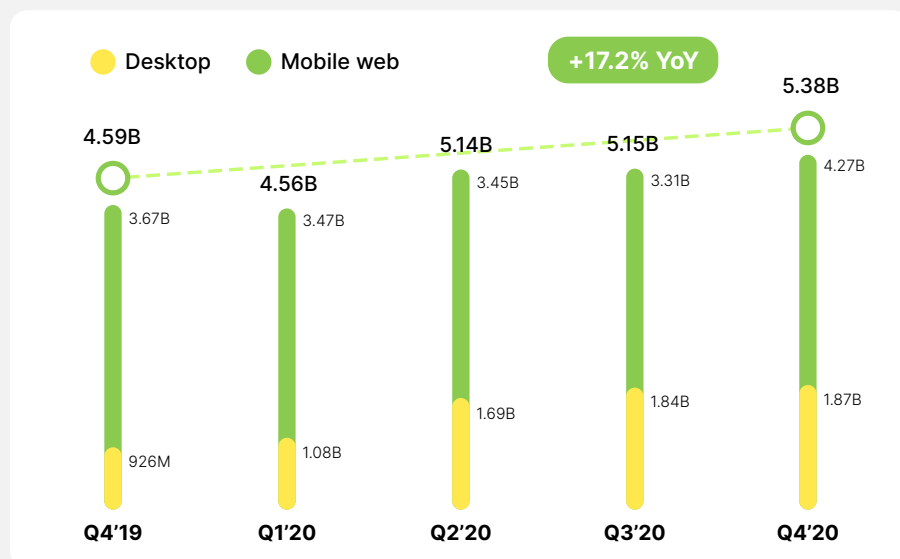
Fastest Growing C2C Buy/Sell Marketplace Websites
Year-over-year percentage growth
by Total Visits, US

	Website	Growth
REBAG	rebag.com	106%
depop	depop.com	99%
OfferUp	offerup.com	78%
MERCARI	mercari.com	58%
The RealReal	therealreal.com	40%
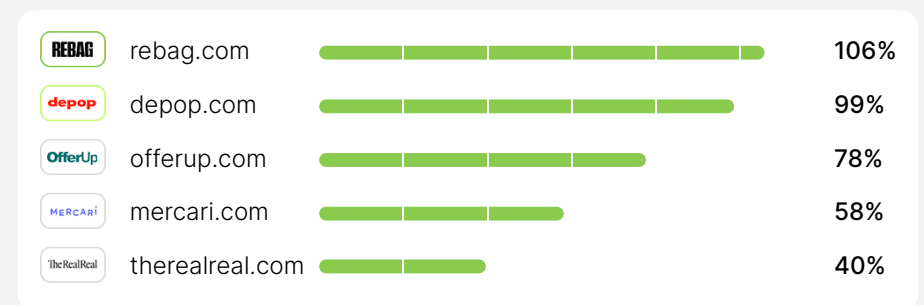
Top Fast Fashion Apps, US

• SHEIN continues its impressive run as the top player in fast fashion, both as a top downloaded app and as one of the fastest growing. Unlike some of its competitors, SHEIN does not have any physical storefronts. This lowers the company's overhead costs and allows for larger, influencer-driven marketing campaigns, focusing on Instagram and TikTok.

Top Fast Fashion Apps
Quarterly downloads, US

+29.3% YoY

	10.15M	9.64M	15.81M	12.76M	13.12M
	Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
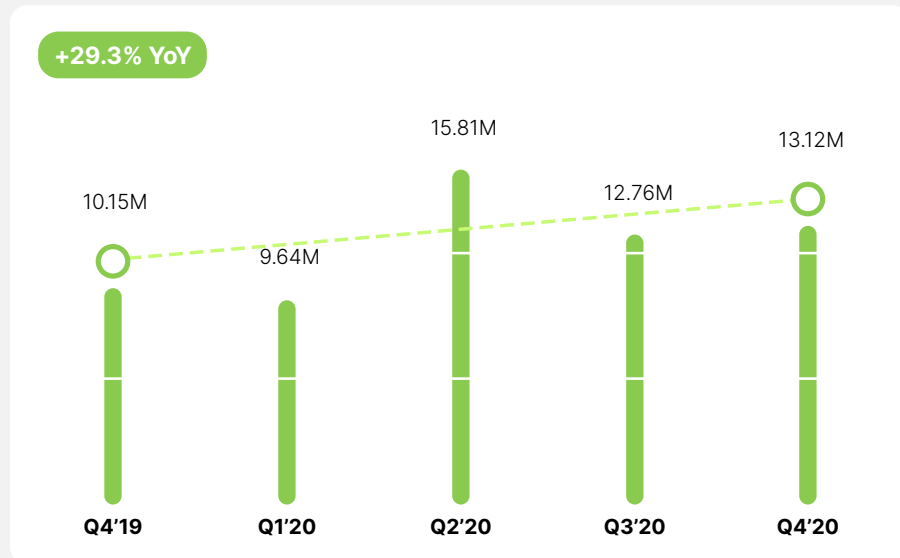
Top Fast Fashion Apps, US

• Forever 21 has the stickiest app in the US, and remains a top downloaded performer, despite filing for bankruptcy last year. The company is being jointly acquired by three companies, allowing the chain to continue to operate in the US and internationally.

• Boohoo is UK-based online retailer. Last year, the company was reportedly planning on establishing its first physical storefront in London. With or without the location, its app is growing rapidly.

Stickiest Fast Fashion Apps

Forever 21		41.9%
Urban Outfitters		39.4%
ZARA		37.8%
SHEIN		34.3%
ASOS		31.2%
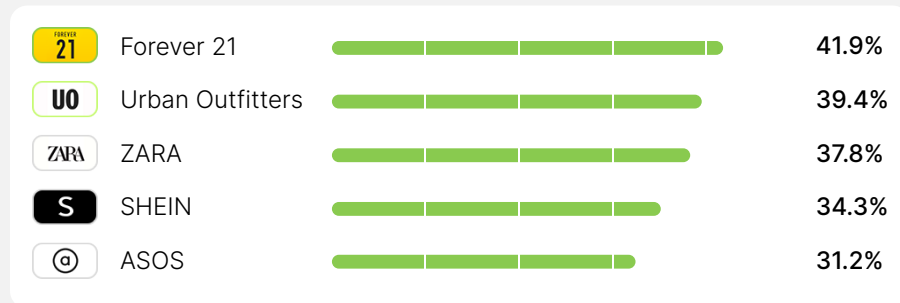
Fastest Growing Fast Fashion Apps
Year-over-year percentage growth by MAU, US

Boohoo		104%
SHEIN		100%
Bershka		84%
PrettyLittleThing		60%
Mango		56%
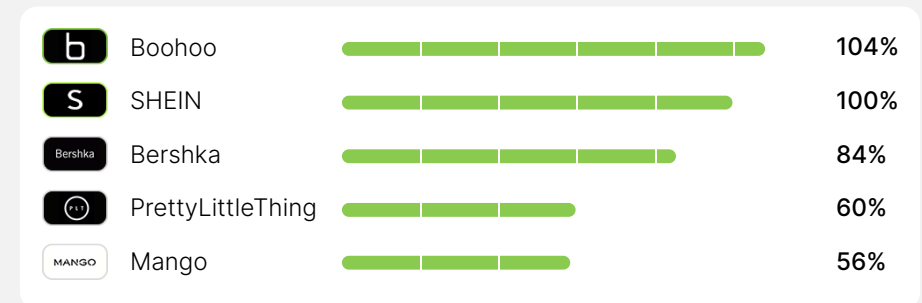
Top Fast Fashion Websites, US

• The top Fast Fashion websites increased their total visits 29.6% and desktop visits 65.3% YoY in the US.

• SHEIN is not only the largest Fast Fashion retailer, it is also the fastest growing Fast Fashion site in the US. This means that, despite its size, the retailer still has an audience left to acquire.

• Romwe comes in as the second fastest growing Fast Fashion website. Like SHEIN, Romwe is an international women's clothing site out of China.

Total quarterly visits of top Fast Fashion retailer websites
Quarterly visits, US
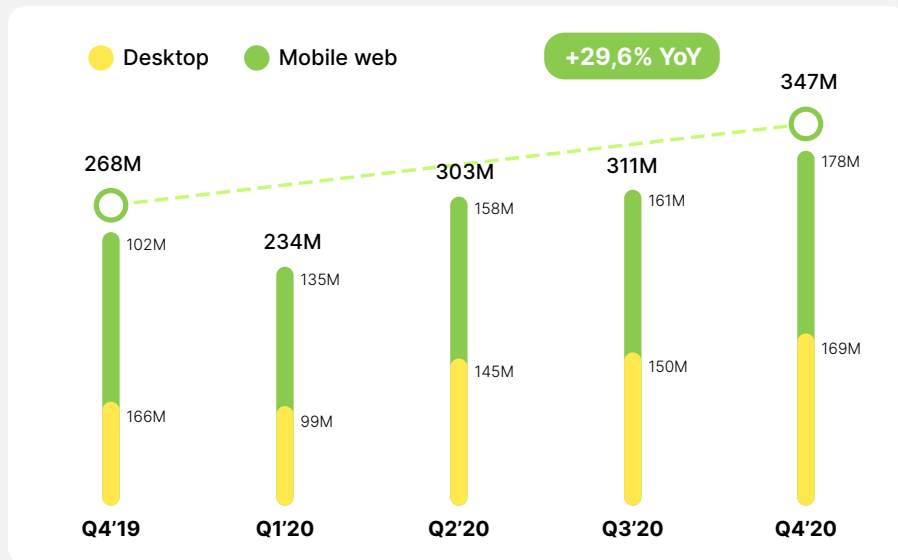
Fastest Growing Fast Fashion Retailer Websites
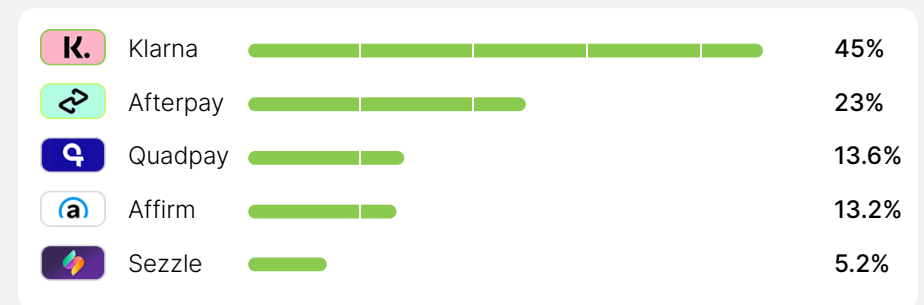Year-over-year percentage growth
by Total Visits, US
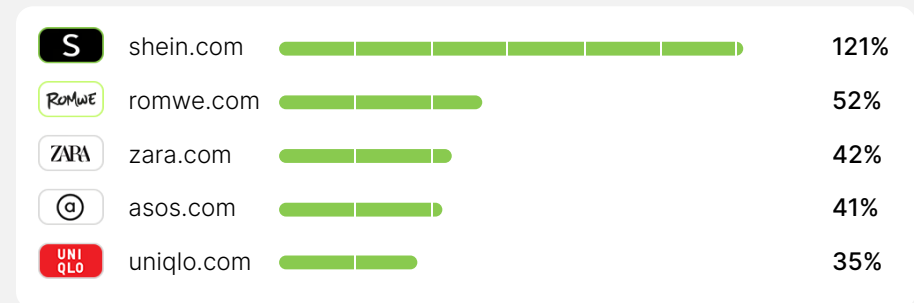
Top Luxury Retailer Apps, US

• Despite overall market growth of 16.3%, only a few of the top luxury retailers in the US saw significant growth, YoY or QoQ. Nordstrom, Grailed, Saks, Bloomingdale's, Mytheresa and Moda saw downloads decline YoY in the fourth quarter.

• Farfetch is the market leader here. The app's MAU in the US increased 187% YoY and and 34% QoQ.

• Lyst, the fastest growing luxury retailer by mobile app MAU in the US, is an online-only service, enabling shoppers to search for items at thousands of online fashion stores at once.

Top Luxury Retailer Apps
Quarterly downloads, US

+16.3% YoY

Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
1.83M	1.48M	1.74M	2.17M	2.13M

Fastest Growing Luxury Retailer Apps
Year-over-year percentage growth by MAU, US

LYST	Lyst	714%
FF	FARFETCH	187%
	NET-A-PORTER	115%
YOOX	YOOX	64%
G	Grailed	29%
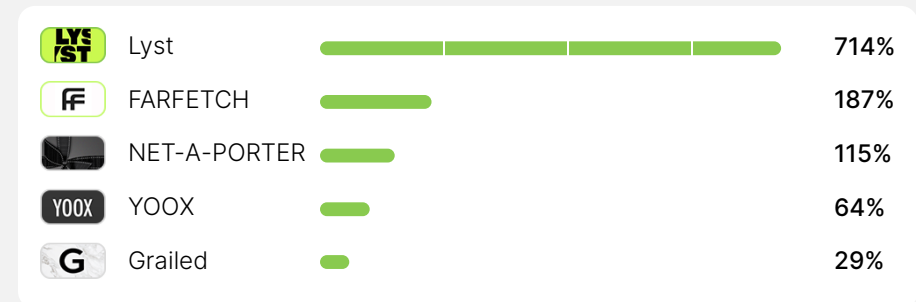
Top Luxury Retailer Websites, US

• The top Luxury Retailer websites increased visits a modest 8.1% YoY.

• Having been visited over 46 million times, Nordstrom's website was the most visited Luxury retailer website in Q4 in the US.

• The #2 most visited of this market, Bloomingdale's, is far behind Nordstrom with just over 14 million visits.

• Saks, the fastest growing site of the group, saw its app downloads decline YoY, but its website visits increase. In order to see what's going on here, Saks should take a thoughtful look at its user demographics on both platforms.

Total quarterly visits of top Luxury retailer websites
Quarterly visits, US
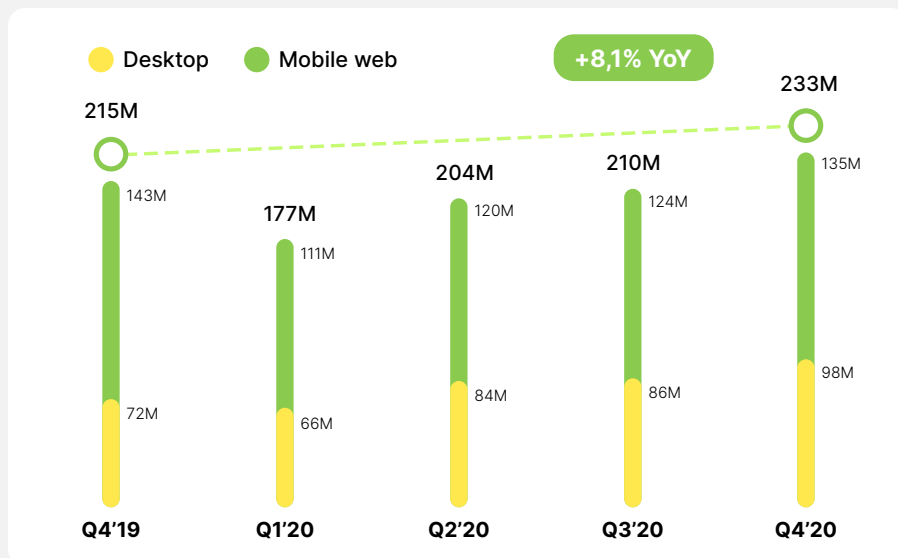
Desktop Mobile web **+8,1% YoY**

215M
233M

143M
177M
204M
210M
135M

111M
120M
124M

72M
66M
84M
86M
98M

Q4'19 **Q1'20** **Q2'20** **Q3'20** **Q4'20**

Fastest Growing Luxury Retailer Websites
Year-over-year percentage growth by Total Visits, US

Saks Fifth Avenue	saksfifthavenue.com	65%
LYS/ST	lyst.com	61%
FF	farfetch.com	58%
G	grailed.com	42%
bloomingdales	bloomingdales.com	37%
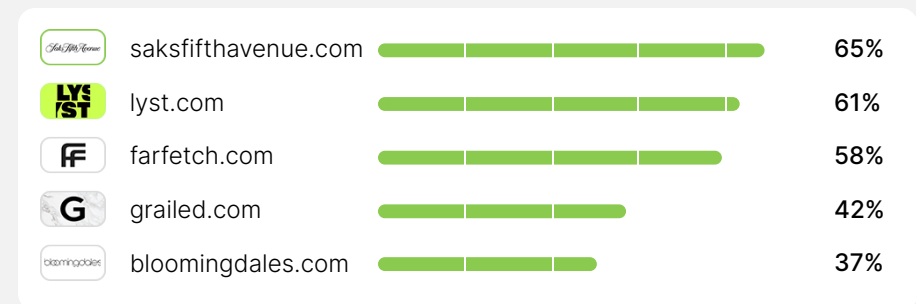
Top Athletic Retailer Apps, US

• Athletic Retailer apps enjoyed a 34.2% YoY increase in downloads in the US, and a 36% QoQ increase.

• The two big players here, and the most downloaded, are Nike and Adidas. However, Nike was downloaded over three million more times than Adidas. Even before the pandemic, Nike placed big bets on digital, focusing more on selling directly to consumers rather than via wholesalers.

• Fabletics is an online-only, subscription-based retailer founded by celebrity Kate Hudson. While tiny compared to the likes of Nike, it has managed to secure a 2% share of the market.

Top Athletic Retailer Apps
Quarterly downloads, US

+34.3% YoY

4.94M	4.9M	5.56M	4.88M	6.63M
Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
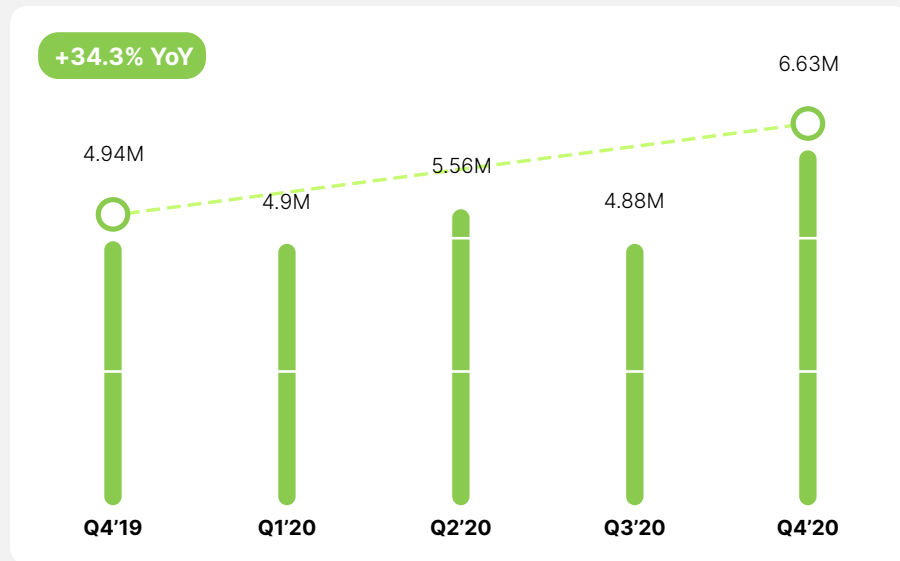
Q4'20 Market Share of Athletic Retailer Apps
Market share is by Average Q4'20 MAU, US

Nike		65.6%
Adidas		24.2%
lululemon		3.9%
Under Armour		3.8%
Fabletics		2.0%
FILA		0.5%
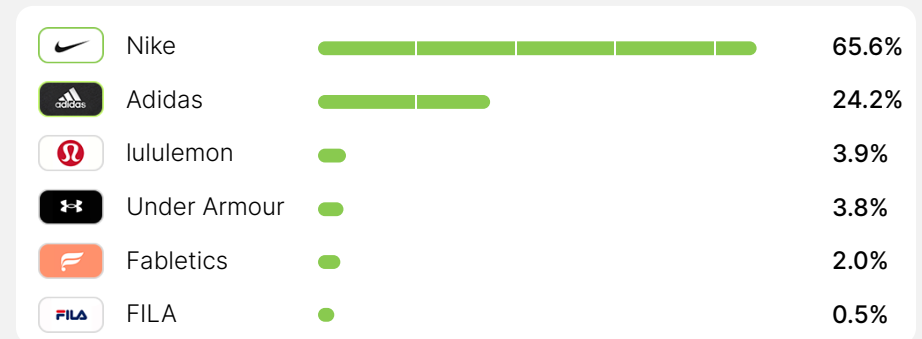
Top Athletic Retailer Websites, US

• The top Athletic retailer websites increased visits 12.3% YoY. Visits increased both on desktop and on mobile web.

• Nike's website, like its app, was the most popular of this market in Q4 in the US.

• Fabletics, mentioned on the previous slide, appears here as the fastest growing Athletic retailer website in the US. With its subscription model, the site can guarantee monthly returning visitors.

• Outdoor Gear Land and Camp Saver made it onto the fastest growing list as well, a result likely caused by people discovering outdoor activities as safe, COVID-friendly options.

Total quarterly visits of top athletic retailer websites
Quarterly visits, US
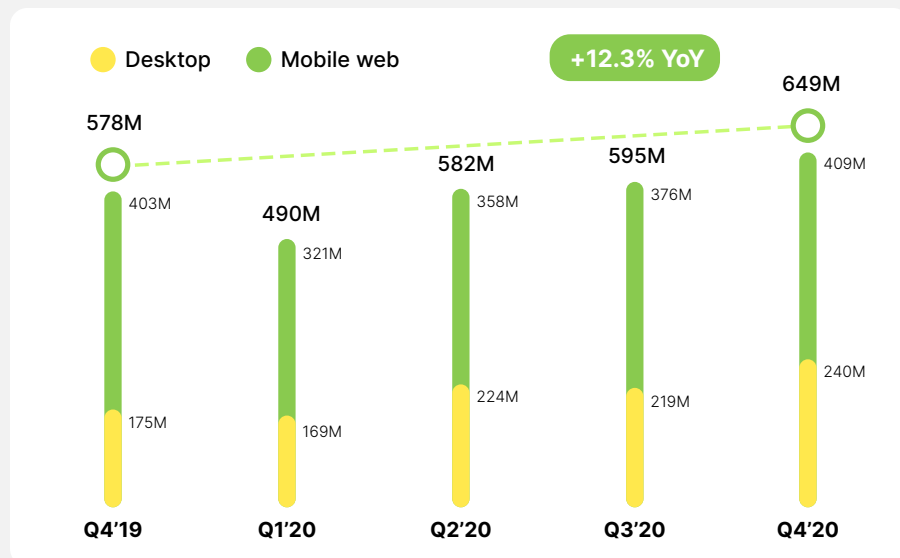
Fastest Growing Athletic Retailer Websites
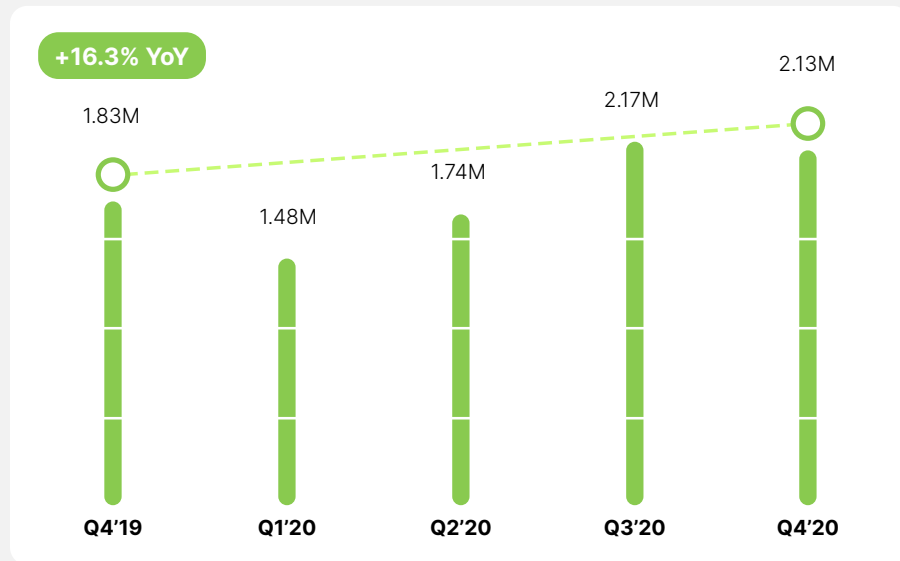Year-over-year percentage growth by Total Visits, US

Total quarterly visits chart:
- Desktop / Mobile web / +12.3% YoY
- Q4'19: 578M (403M mobile, 175M desktop)
- Q1'20: 490M (321M mobile, 169M desktop)
- Q2'20: 582M (358M mobile, 224M desktop)
- Q3'20: 595M (376M mobile, 219M desktop)
- Q4'20: 649M (409M mobile, 240M desktop)

Fastest Growing Athletic Retailer Websites:
- fabletics.com — 87%
- outdoorgearlab.com — 62%
- asics.com — 51%
- campsaver.com — 47%
- lululemon.com — 32%
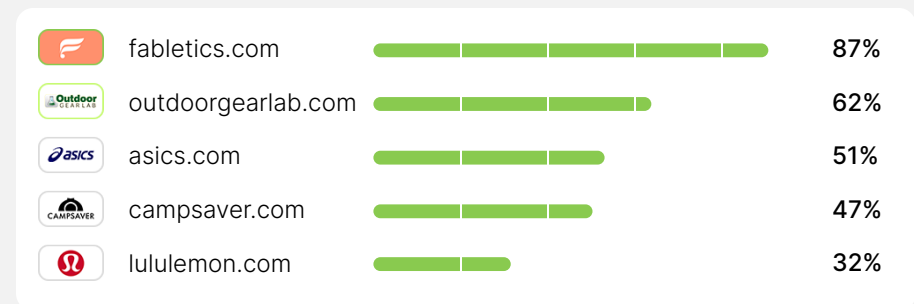
Top Sneaker Apps, US

• YoY growth for Sneaker apps is fairly small at 3.7%. Installs have been trending downward since Q2, when The Last Dance, a miniseries about Michael Jordan, created strong interest in the sneaker market.

Top Sneaker Apps
Quarterly downloads, US

+3.7% YoY

Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
7.45M	6.46M	8.57M	8.23M	7.73M
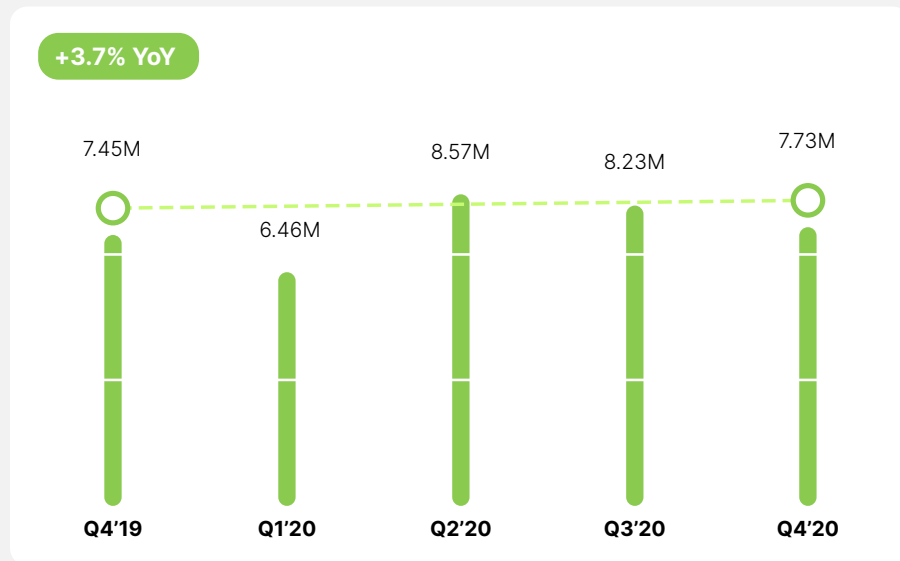
Top Sneaker Apps, US

• Finish Line and KicksOnFire have both seen significant YoY growth and stronger engagement than their larger competitors.

• Sneakers continue to be a big collector's item, with users of these apps signing up to be the first to know of new releases and to check the prices of rare pairs.

Stickiest Sneaker Apps

KicksOnFire		41.7%
Sneaker Crush		40.1%
StockX		32.5%
Nike SNKRS		31.8%
GOAT		30.9%
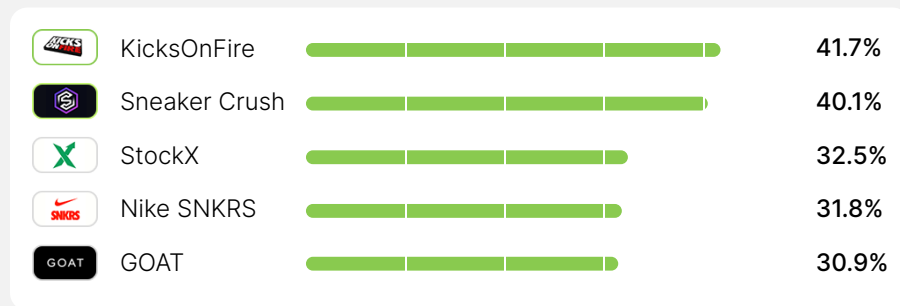
Fastest Growing Sneaker Apps
Year-over-year percentage growth by MAU, US

Finish Line		193%
Foot Locker		106%
KicksOnFire		93%
Sneaker Crush		85%
GOAT		71%

36
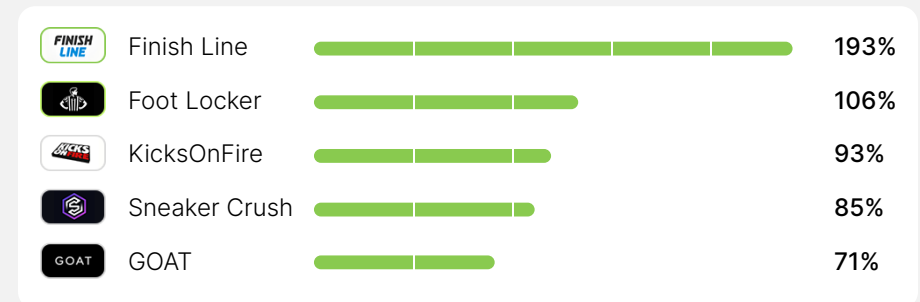
Top Sneaker Websites, US

• The top Sneaker retailer websites increased visits 9.8% YoY— stronger growth than their apps saw, but still not very impressive compared to other markets analyzed.

• Stockx was the most visited Sneaker website in Q4 in the US. The site is a buy/sell marketplace for mostly high-end sneakers, like Yeezys.

• Snipes USA recorded 219% more website visits YoY. This German-based company started expanding into the US in 2020, taking over retail chains Kicks USA and Mr. Alan's.

Total quarterly visits of top sneaker retailer websites
Quarterly visits, US

Desktop   Mobile web   +9.8% YoY

	Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
Total	209M	189M	235.4M	232M	229.5M
Mobile web	120.6M	98M	105.9M	115M	121.6M
Desktop	88.4M	91M	129.5M	117M	107.9M
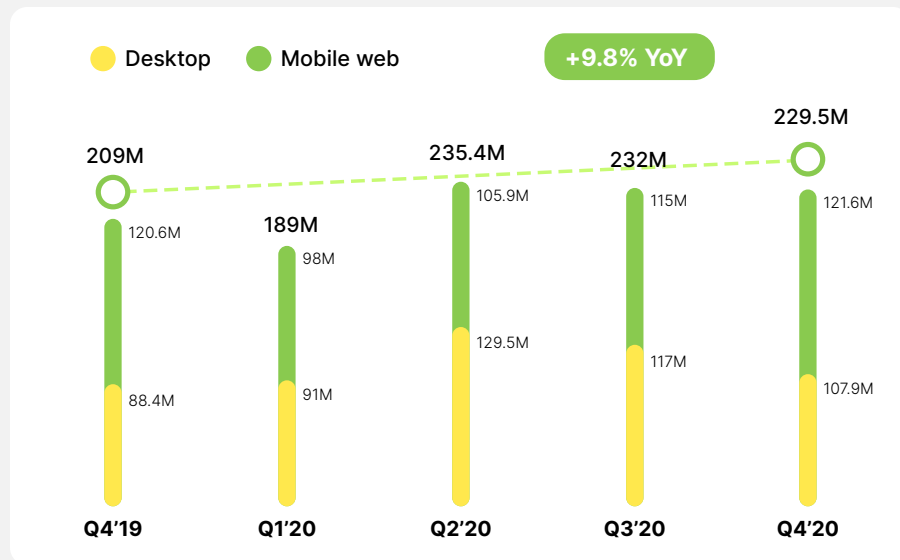
Fastest Growing Sneaker Retailer Websites
Year-over-year percentage growth by Total Visits, US

snipes	snipesusa.com	219%
STADIUM GOODS	stadiumgoods.com	126%
X	stockx.com	62%
KIXIFY	kixify.com	13%
FINISH LINE	finishline.com	5%
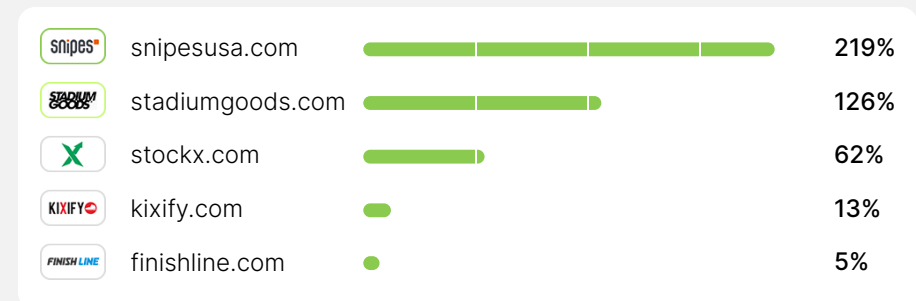
Top Rewards, Coupons, and Savings Apps, US

• Rewards, Coupons, and Saving apps tend to be seasonal in performance, mostly seeing strong use in the holiday quarter as consumers have many items to purchase.

• Fetch was the most downloaded app of the quarter in the US, recording more than 4 million new installs and controlling a 44% share of the market by MAUs.

• Rakuten, RetailMeNot, and Flipp saw a decrease in YoY downloads but growth from Fetch, Ibotta, Honey Smart, and Coupons.com were able to lift the category.

Top Rewards, Coupons & Savings Apps
Quarterly downloads, US

+6.6% YoY

9.3M	8.29M	5.92M	7.03M	9.91M
Q4'19	Q1'20	Q2'20	Q3'20	Q4'20
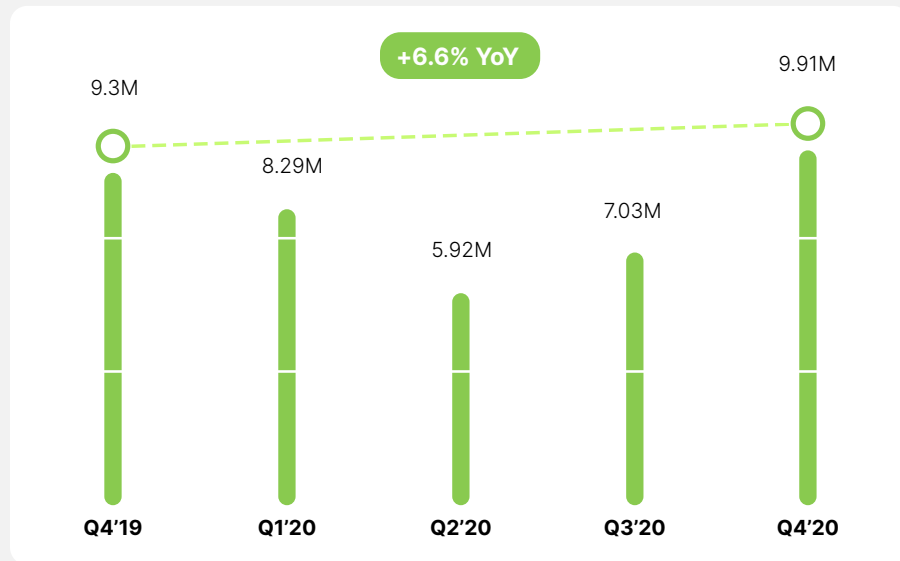
Q4'20 Market Share of Rewards, Coupons & Savings Apps
Market share is by Average Q4'20 MAU, US

fetch	Fetch	44.0%
ib	Ibotta	20.6%
h	Honey	11.6%
Rakuten	Rakuten	7.8%
	Coupons.com	5.6%
flipp	Flipp	5.4%
R	RetailMeNot	5.0%
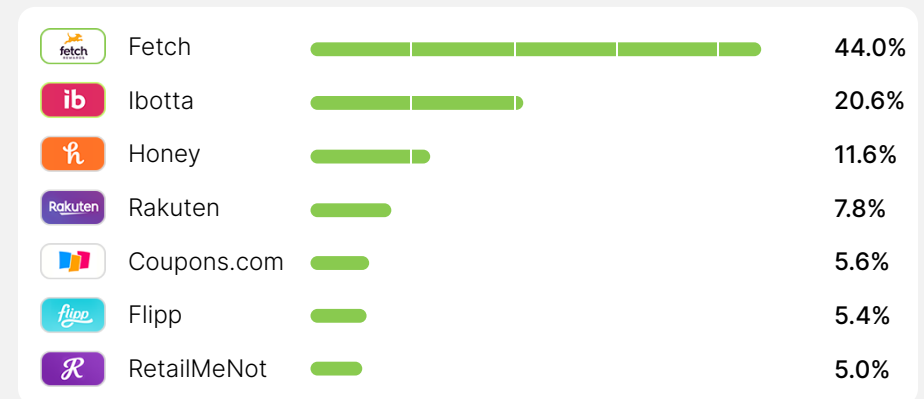
Rewards, Coupons & Savings Websites, US

• Total US visits of the top rewards, coupons and savings websites grew almost 8% YoY.

• Slickdeals.net is the top performing website in this group, with 45% more visits than its next closest competitor in Groupon.com.

• Honey, which was acquired by PayPal for $4 billion in November 2019, grew visits to its website 72% YoY.

Total quarterly visits of top rewards,
coupons & savings websitess
Quarterly visits, US
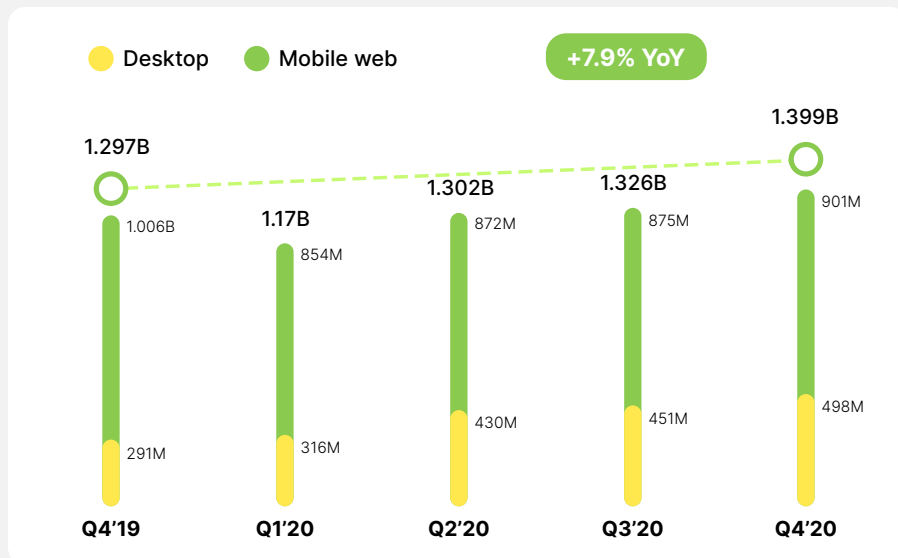
Fastest Growing Rewards,
Coupons & Savings Websites
Year-over-year percentage growth by Total Visits, US

● Desktop	● Mobile web	**+7.9% YoY**

Quarter	Total	Mobile web	Desktop
Q4'19	1.297B	1.006B	291M
Q1'20	1.17B	854M	316M
Q2'20	1.302B	872M	430M
Q3'20	1.326B	875M	451M
Q4'20	1.399B	901M	498M

Website	Growth
couponxoo.com	742%
couponfollow.com	107%
joinhoney.com	72%
couponcause.com	56%
swagbucks.com	45%

apptopia
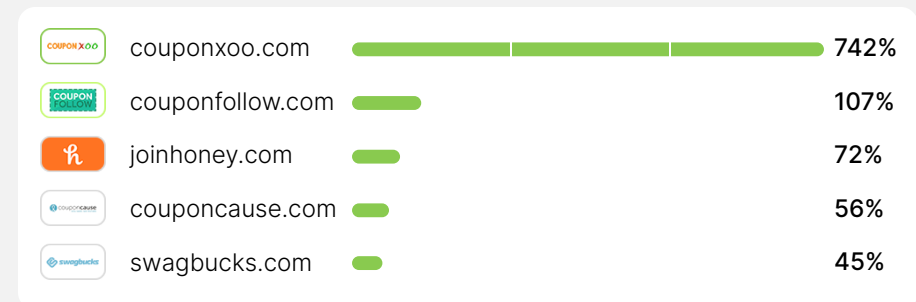
Our data & where it comes from

We are data geeks. Our value to our customers is built on our ability to accurately estimate performance data on the entire app ecosystem. We do things differently than our competitors, and we're proud to show you why we think it's better for your business.

Combining the analytics dashboards for over 125k+ appswith our advanced models, we provide the most reliable estimated data for over 7+ million apps. Over the past 9 years, we have ethically sourced our data without relying on panel data, allowing us to provide the most accurate estimated mobile data without compromising our integrity. Click here for more information.

Semrush brings the power of digital

From insights on competitors' digital footprint to painting a thorough picture of the market landscape, Semrush arms brands with actionable data that they can leverage to make decisions which will bring them maximum impact and growth.

Semrush Traffic Analytics and Market Explorer tools helps businesses to reveal market trends and competitive digital insights – for any website, industry, or market across 190 countries. All data is based on the behavior of millions of real internet users, as well as our own domain, backlink, and keyword databases. To ensure the highest level of accuracy, Semrush uses advanced Machine Learning algorithms to come up with estimations built on statistical sampling and error testing. Learn more here.

apptopia

Apptopia provides competitive intelligence for the mobile app economy. Data points include downloads, active users, revenue, rank, audience intelligence, ASO, SDK intelligence, and more.

Apptopia was founded on the belief that the mobile app community requires transparency to level the playing field and make way for innovation and industry advancements.

Mobile publishers and developers, service providers, and investors use Apptopia on a daily basis to understand and monitor competitors, inform business strategies, and identify emerging consumer interests and trends.

SEMRUSH

Semrush is an online visibility management and content marketing SaaS platform that ensures businesses get measurable results from online marketing. Trusted by more than 7,000,000 marketing professionals around the world.

Semrush lets businesses analyze massive amounts of data and gain insights for their campaigns across all marketing channels.

With 45 + tools for search, content, social media and market research in the platform, data for more than 190 countries, seamless integration with Google and task management platforms, Semrush is now a must-have solution for all companies who are serious about online.

We love your feedback!

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about it! If you have any feedback
about our report or have suggestions,
mail us at **mr-marketing@semrush.com**

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