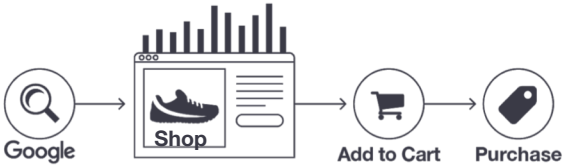
jumpshot®



What Lies Beneath

Unveiling the Hidden Customer Journey



Once upon a time, customers came to one site and gave marketers enough data about their behavior.



Today, customers search and browse numerous sites, and finally buy . . . somewhere.

© 2018 Jumpshot, Inc.

jumpshot

An average of 70%
of online purchases
happen within
walled-garden marketplaces

Amazon has more than 80% market share across numerous categories

Electronics



Home Improvement



Food



Sports, Fitness & Outdoors



Health (Medicines)



Household Essentials



© 2018 Jumpshot, Inc.

jumpshot

But Amazon doesn’t dominate all categories

Furniture



Beauty



Women's Clothing



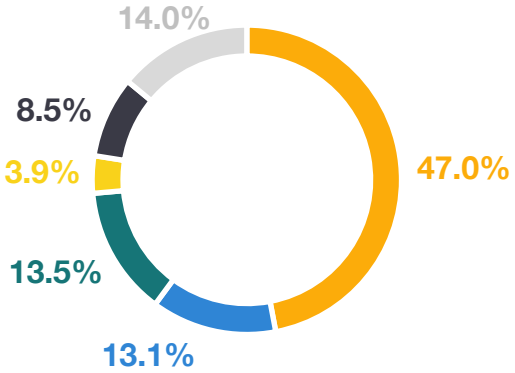
© 2018 Jumpshot, Inc.

Furniture

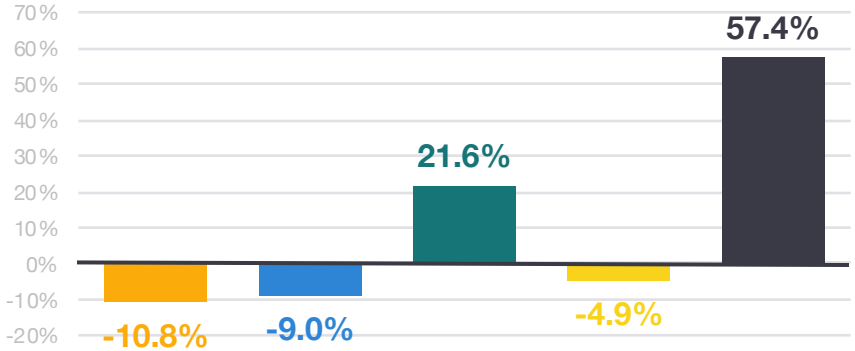
Wayfair has a good market hold and continues to grow at 21%, outshone in YoY growth by Ikea at 57%

amazon Walmart wayfair overstock IKEA Others

Q2 2018 Transaction Share



Q2 2017 vs. Q2 2018 YoY Change in Market Share



© 2018 Jumpshot, Inc.

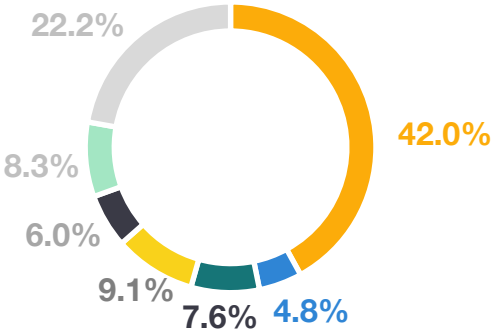
jumpshot

Women's Clothing

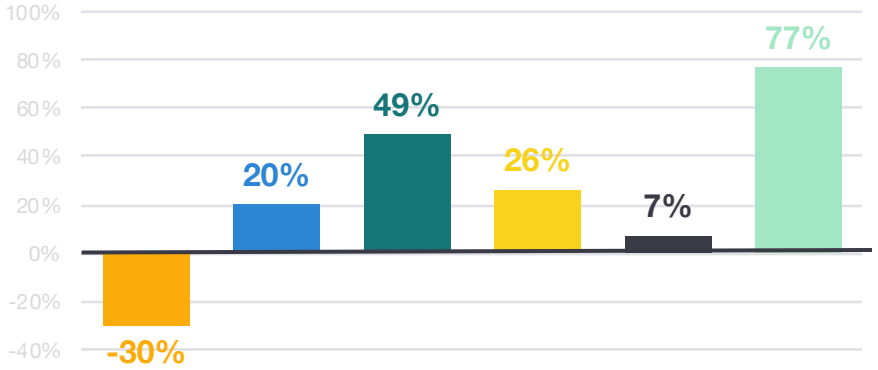
All top marketplaces are growing share except Amazon
H&M grew the highest at 77% YoY

amazon | Walmart | JCPenney | KOHL'S | macy's | H&M | Others

Q2 2018 Transaction Share



Q2 2017 vs. Q2 2018 YoY Change in Market Share

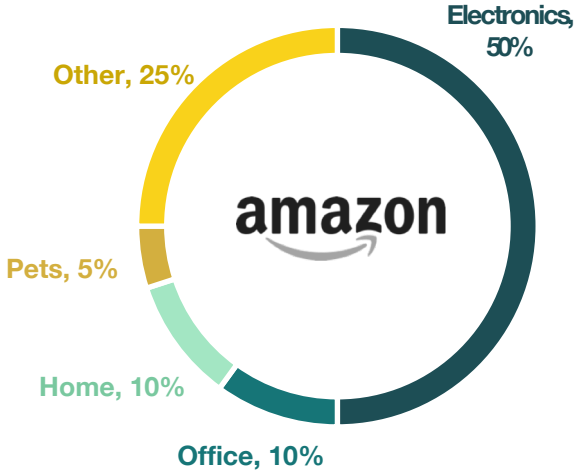


© 2018 Jumpshot, Inc.

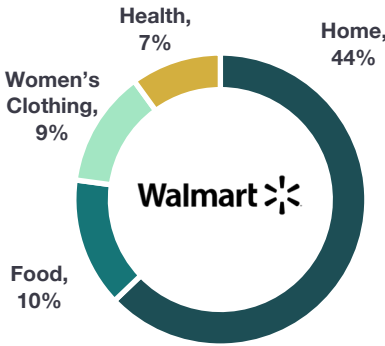
jumpshot

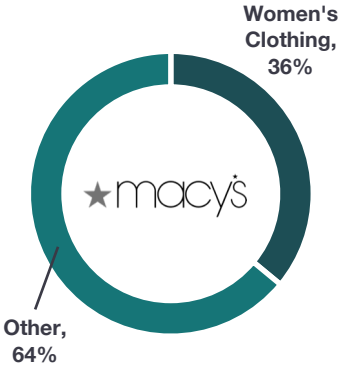
Do Amazon Private Labels Really Pose a Threat? It depends on the category . . .

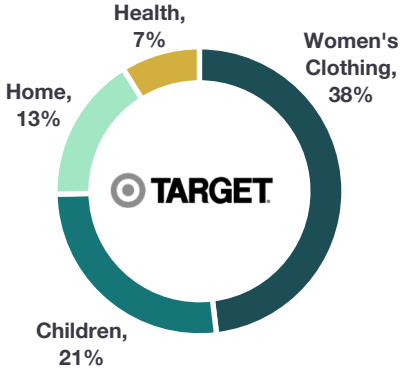
47% Private Label Market Share



53% Private Label Market Share



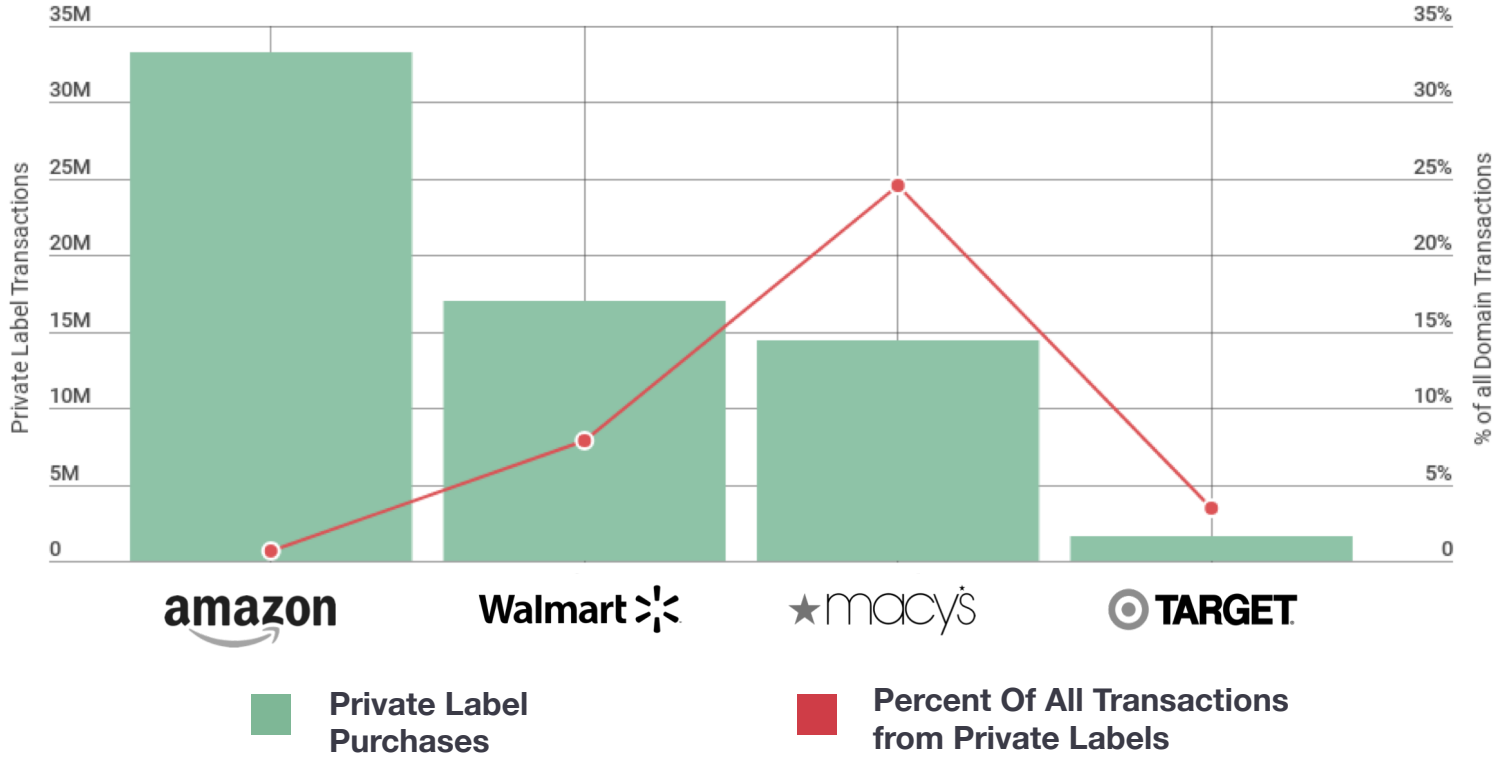




© 2018 Jumpshot, Inc.

jumpshot

Macy's and Walmart see the Highest Percentage of Private Label Transactions



© 2018 Jumpshot, Inc.

jumpshot

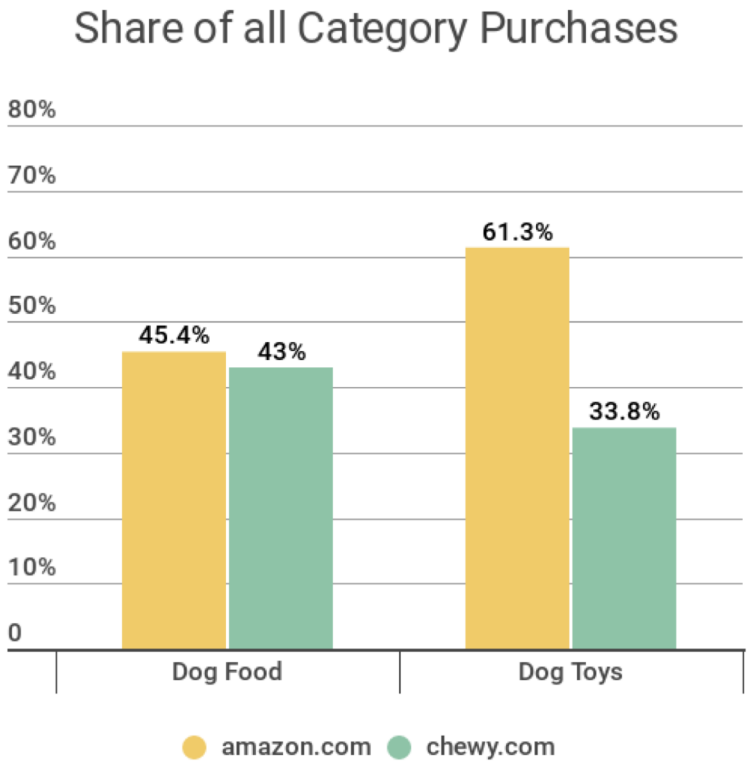
Deep Dive into Dog Food eCommerce



© 2018 Jumpshot, Inc.

jumpshot

Determine the Optimal Marketplace for your Category



- For Dog Food purchases, Amazon faces stiff competition from Chewy.com
- But for Dog Toys, Amazon hasn't faced the same threat

Source: Jumpshot Insights Platform, 2018

© 2018 Jumpshot, Inc.

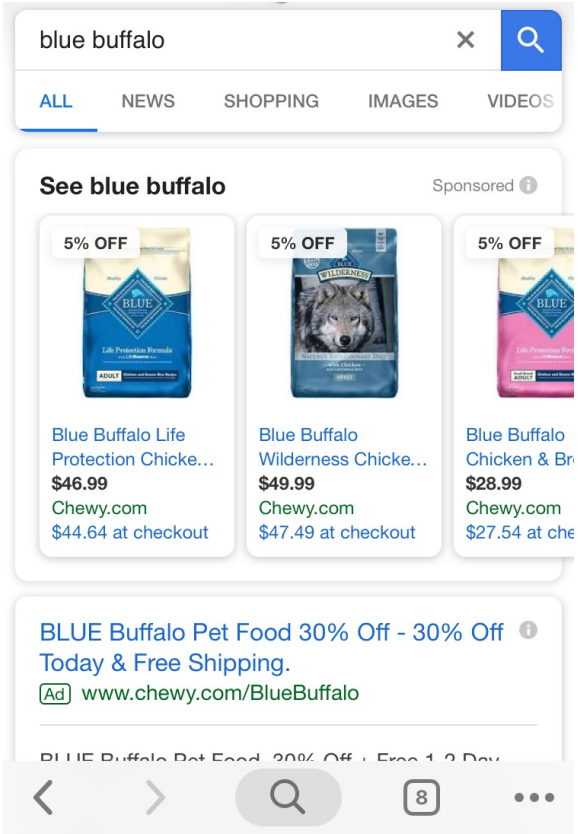
Understand What's Driving Traffic

Percent of category visits from paid search



chewy.com

amazon



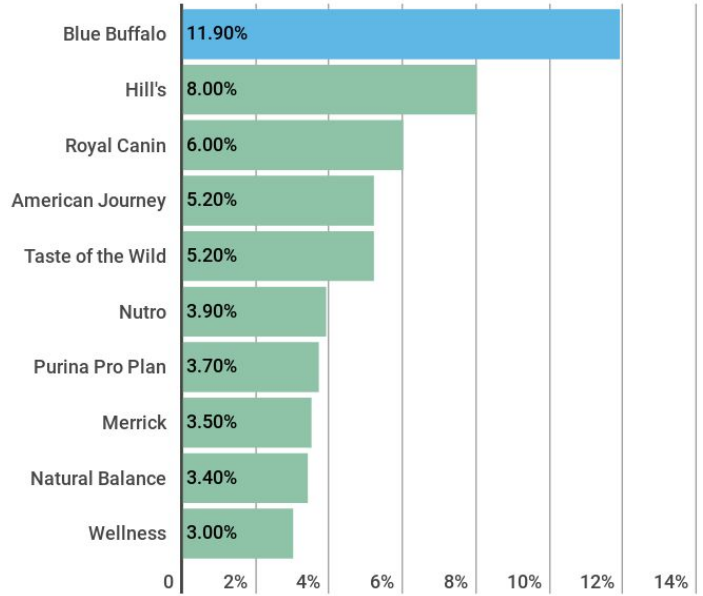
Source: Jumpshot Insights Platform, 2018

© 2018 Jumpshot, Inc.

jumpshot

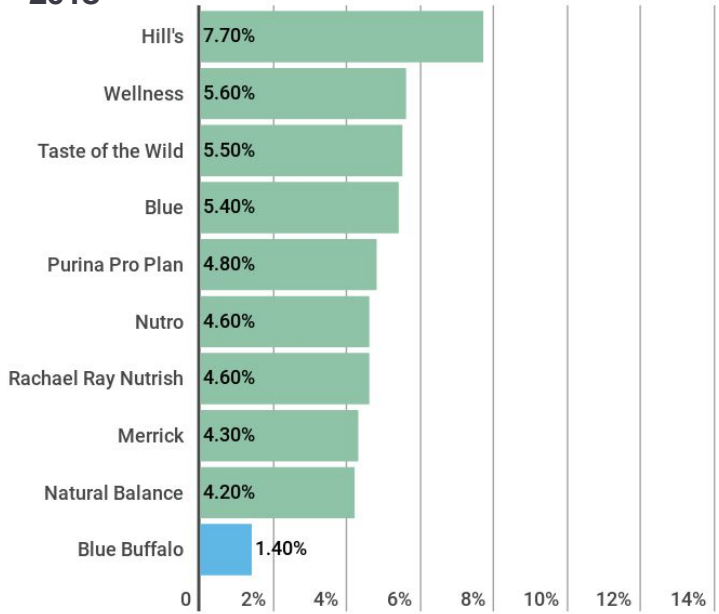
Know the Competitive Landscape Across Marketplaces

Chewy.com Dog Food Market Share By Brand 2018



- On Chewy, Blue Buffalo leads in market share with 11.9% of all transactions

Amazon.com Dog Food Market Share By Brand 2018



- On Amazon, Blue Buffalo only takes 1.4% market share and is the 20th ranked brand.

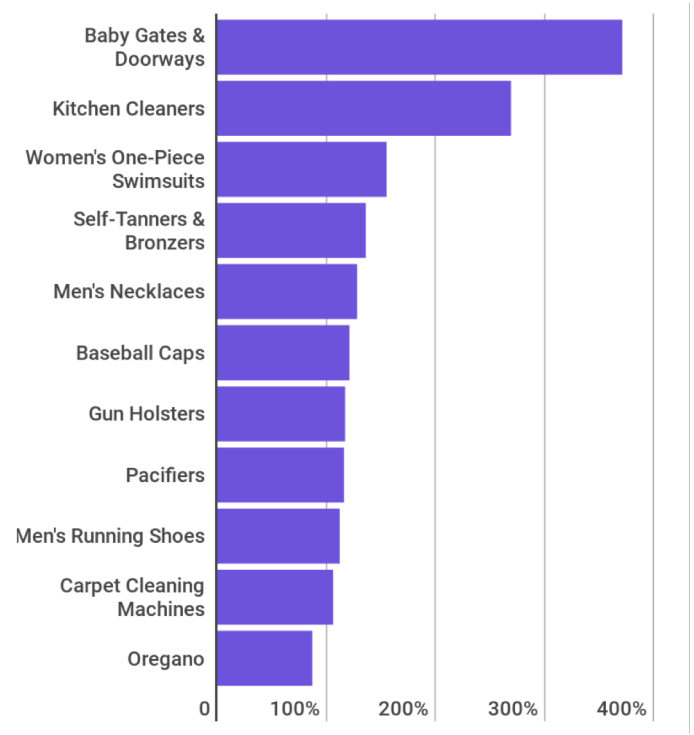
Source: Jumpshot Insights Platform, 2018

© 2018 Jumpshot, Inc.

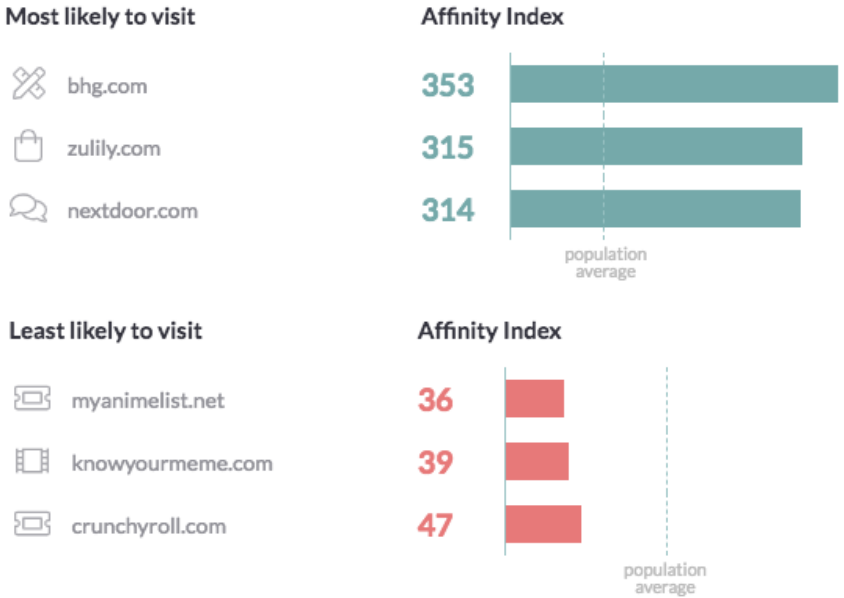
jumpshot

Understand What Distinguishes Your Customers

From a specific group, like buyers of cat food



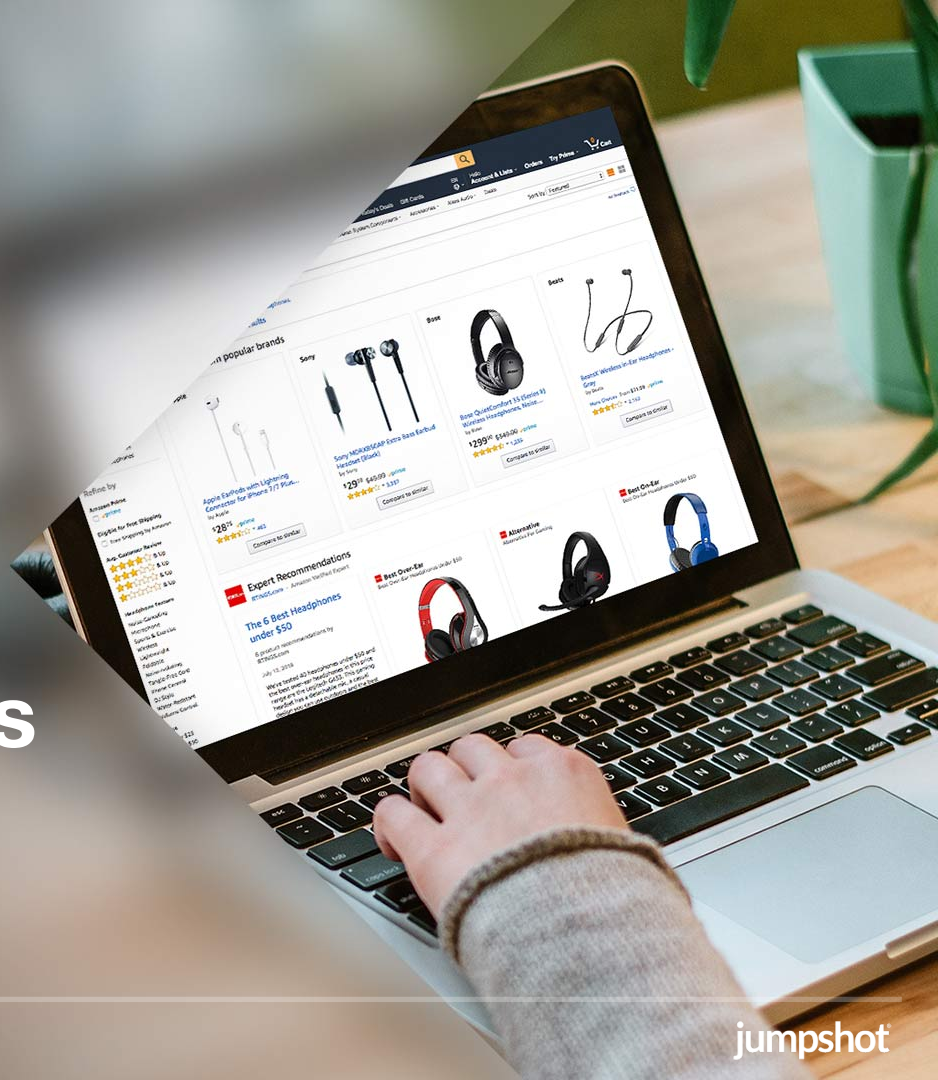
From the population at large



© 2018 Jumpshot, Inc.

jumpshot

Amazon is increasing focus on search and sponsored placements

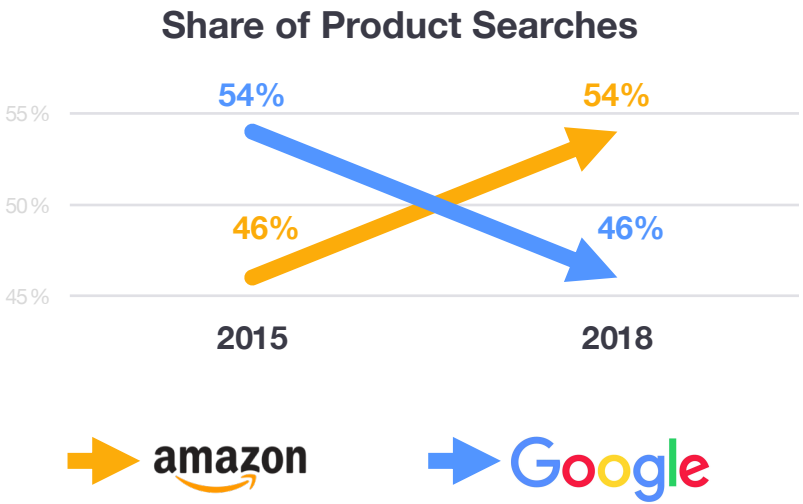


© 2018 Jumpshot, Inc.

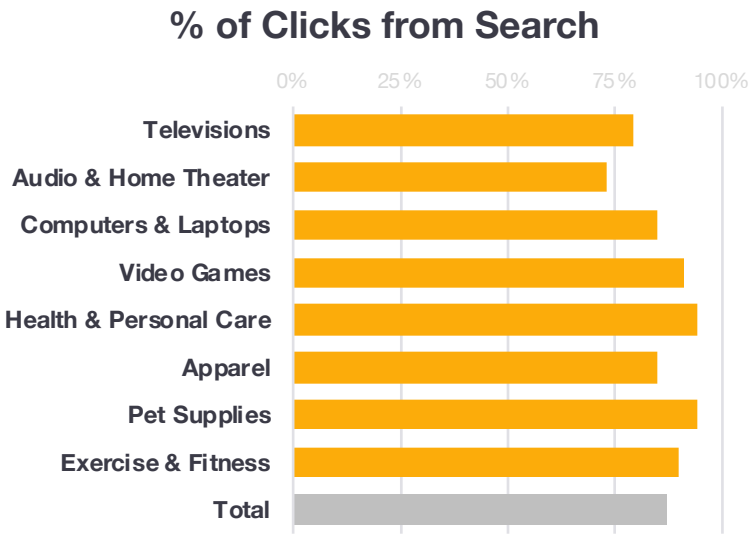
jumpshot

Amazon Has Overtaken Google in Product Search

- About **54%** of product searches begin on Amazon, up from **46%** in 2015

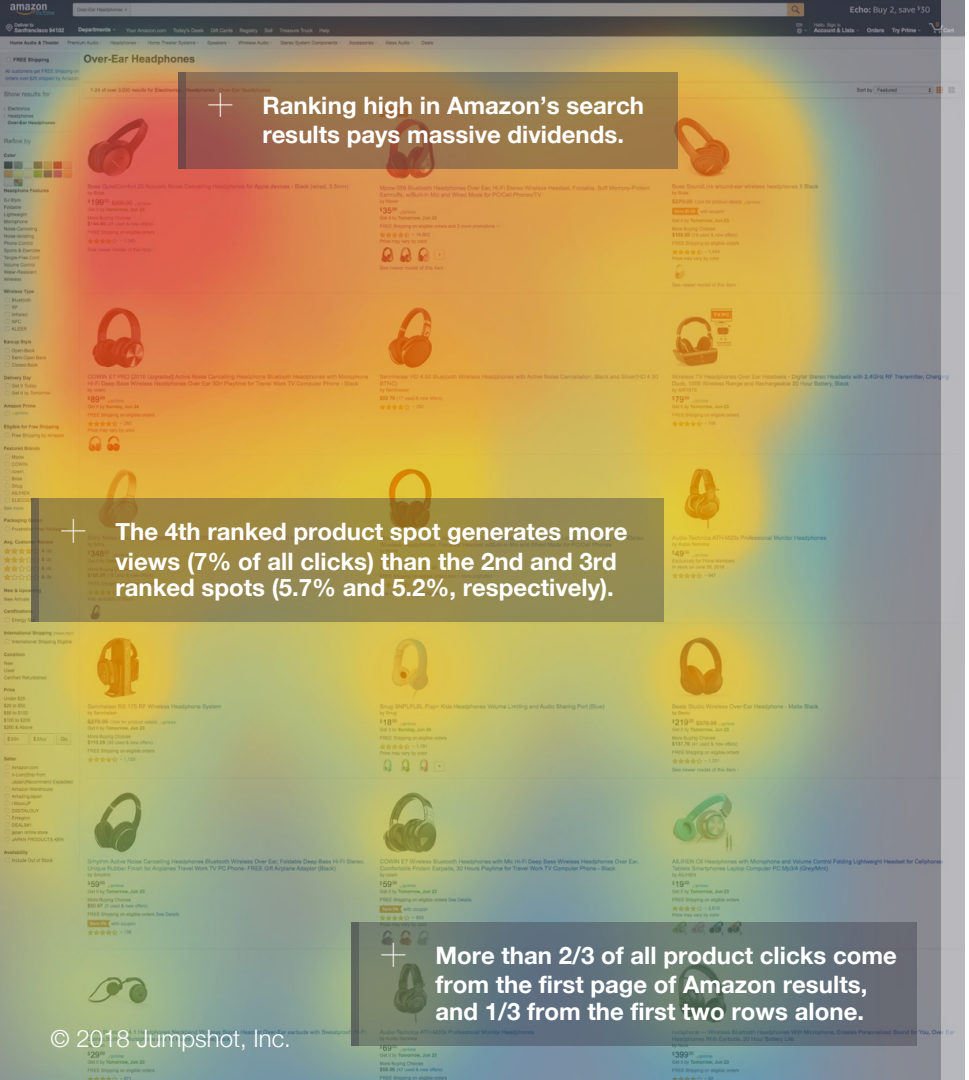


- Almost **90%** of all product views on Amazon result from Amazon's product search and not merchandising, ads, or product aggregators



© 2018 Jumpshot, Inc.

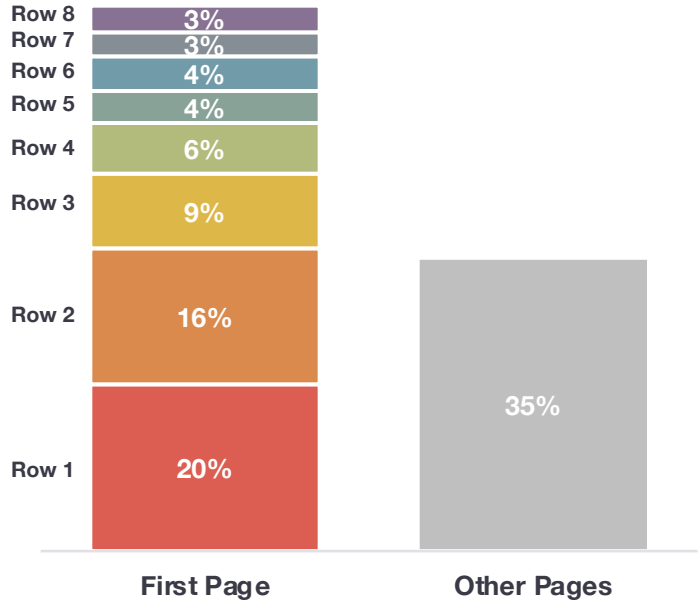
jumpshot



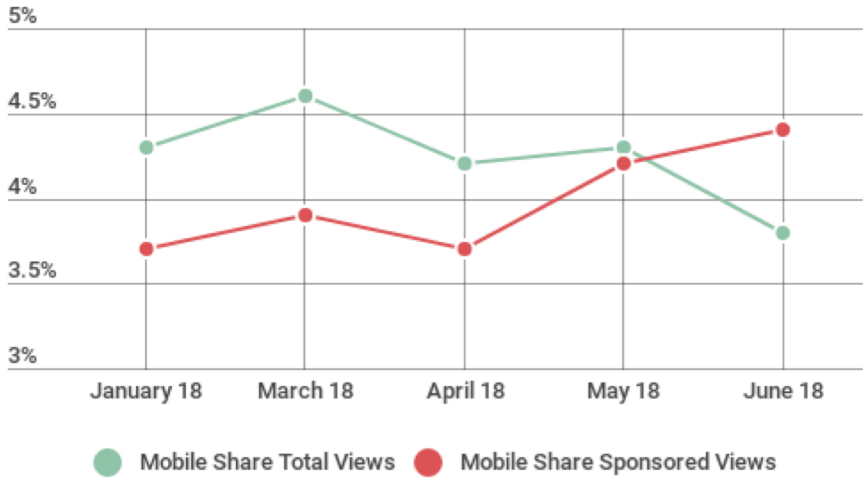
© 2018 Jumpshot, Inc.

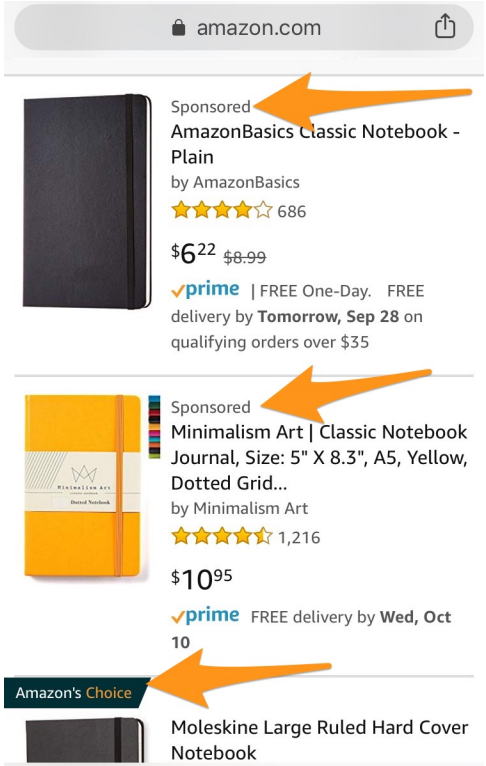
Amazon On-site Search Placement is Vital for Product Views

Share of Product Views by Amazon Search Page Results



Mobile's Share of Views is Declining but Sponsored Views on Mobile are Rising

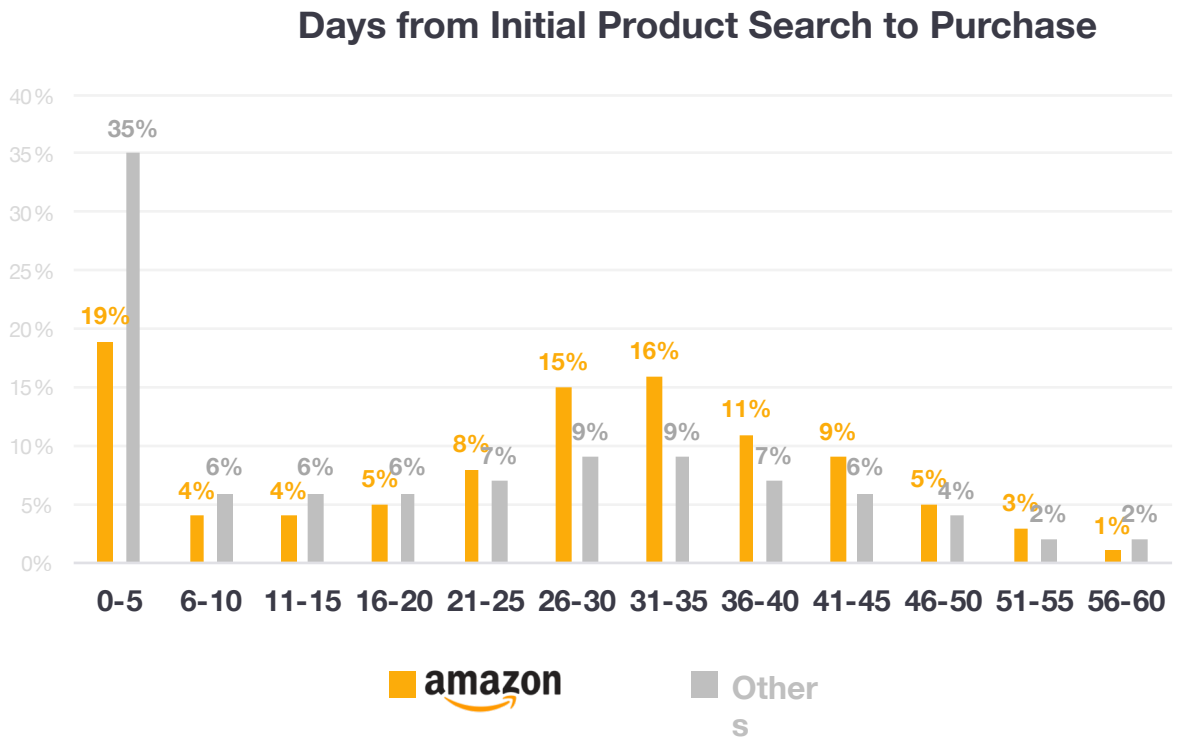




© 2018 Jumpshot, Inc.

jumpshot

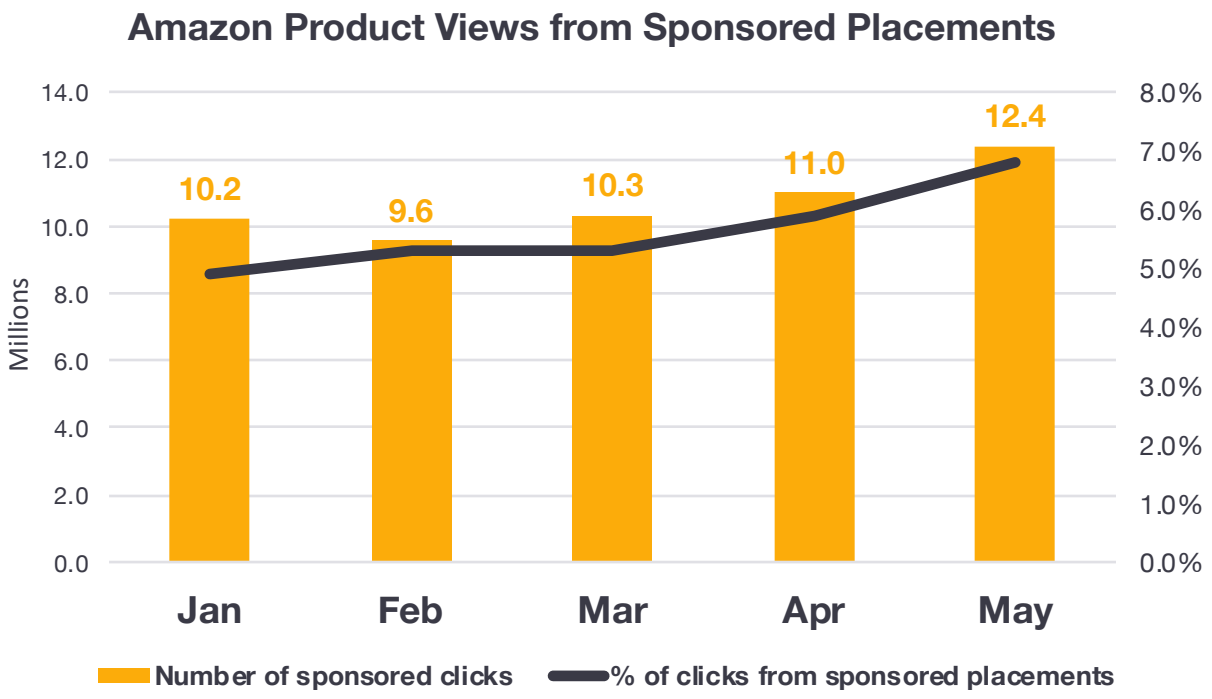
Time to Purchase from Amazon Search is Longer Than Google



- Time to purchase is faster for shoppers who use Google search and buy on a marketplace other than Amazon, on average
- **35%** of Google searches, and less than **20%** of Amazon searches led to a transaction within 5 days
- Across all categories, Amazon search averages **25.9** days from search to purchase. Google search averages just **19.6** days

© 2018 Jumpshot, Inc.

Amazon is Increasing Focus on Sponsored Ads



- Sponsored listings only make up about **6%** of all product views from Amazon's search results page
- Clicks from sponsored placements on Amazon have increased **17%** since the beginning of 2018

© 2018 Jumpshot, Inc.

jumpshot

Summary



The data you need is here



Competitive intelligence connects across retailers



Find your buyers no matter how they find you

© 2018 Jumpshot, Inc.

jumpshot®

Jumpshot delivers digital intelligence from within the Internet's most valuable walled gardens.

Our real-time, anonymized global panel tracks 5B actions a day across 100 million devices to deliver insights into online consumer behavior.

Jumpshot works with customers including Condé Nast, IRI, Kantar, Pepsi, TripAdvisor and Unilever, among others.

Learn more at jumpshot.com

