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Industry Insights for 2023 & Beyond

# THE FUTURE OF ECOMMERCE IS NOW



# Introduction

Since the start of the COVID-19 pandemic, trends in ecommerce have continued evolving. In 2020, the industry witnessed a massive boom as consumers searched online for everything from entertainment to groceries. But as [lockdown measures eased ↗](#) and [vaccination rollouts continued through 2021 and 2022 ↗](#), growth in ecommerce continued, though at a slightly slower pace.

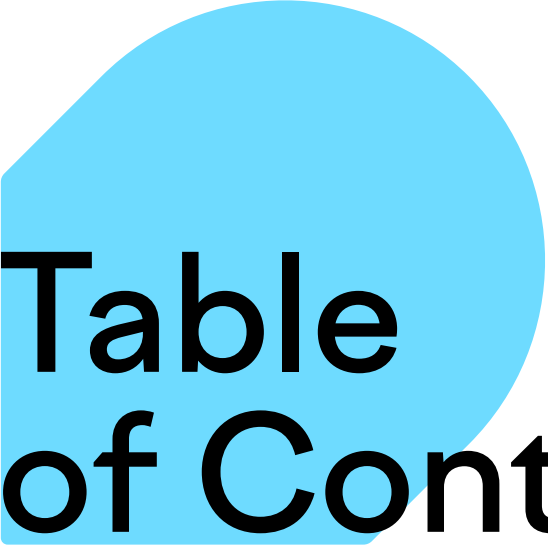
In 2023, the ecommerce industry faces a new set of opportunities and challenges. While interest rates continue fluctuating and the possibility of a widespread global recession remains, 2023 has also brought some exciting technological advancements that are shaping the industry in surprising ways.

While the future looks hopeful, many questions remain: How is the ecommerce industry responding to economic uncertainty?

How can ecommerce businesses stay competitive in an increasingly crowded landscape?

In this report, we seek to answer these questions and more using ecommerce industry traffic data from [Semrush Open.Trends ↗](#) and [Semrush.Trends ↗](#), and Amazon-focused data from Semrush's [Keyword Wizard for Amazon tool ↗](#). The data primarily spans from March 2022 to March 2023. While we touch on most regions across the globe, the report specifically focuses on global data generally and U.S. data specifically.

In assessing the ecommerce industry in depth and highlighting some overarching ecommerce trends that will likely stick for the long haul, we hope to help you shape a smarter, insight-driven digital marketing strategy for your ecommerce business in years to come.



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# Global Ecommerce Growth Dynamics

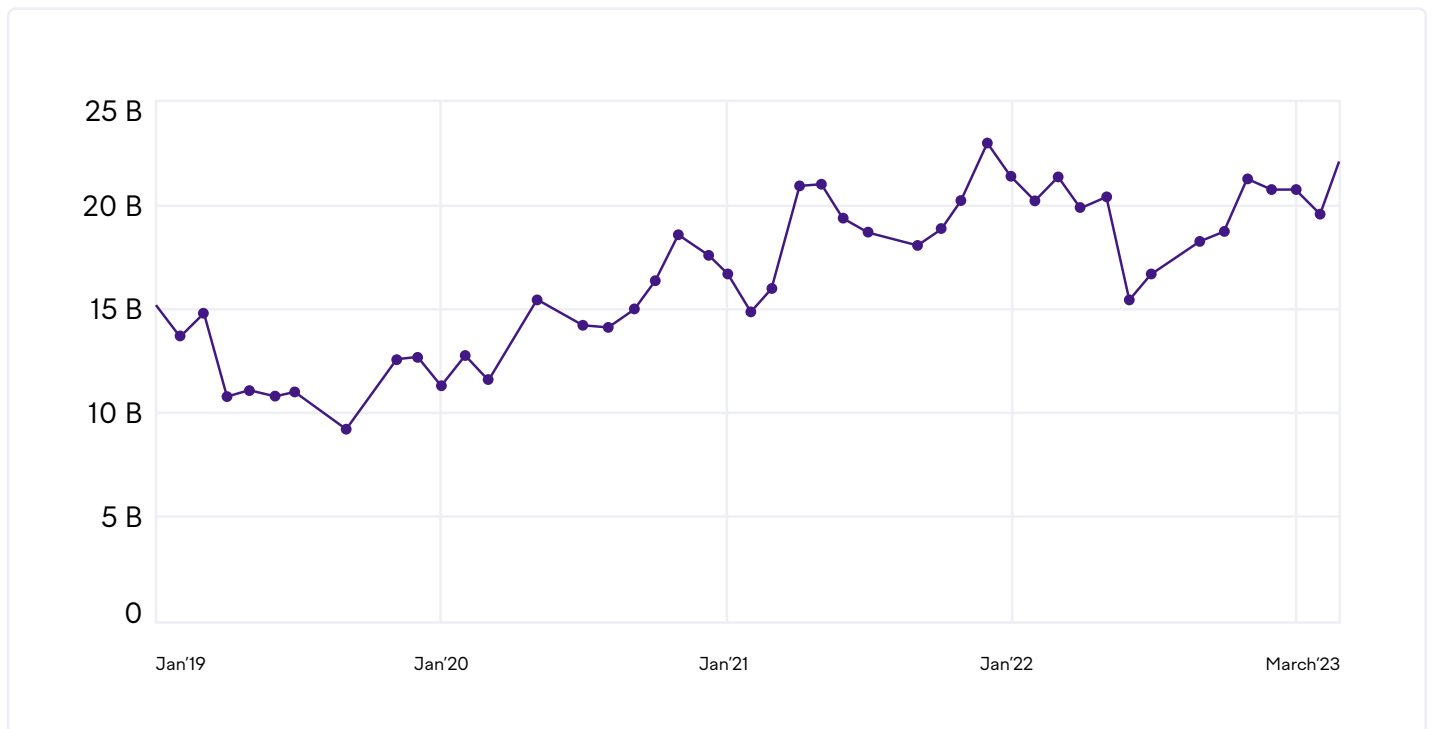


# Global Ecommerce Growth Dynamics

Over the past decade, the ecommerce industry has experienced a meteoric rise. Whether you look at revenue or web traffic, the results are clear: shoppers are turning to the internet at an increasing rate to make purchases of all shapes and sizes.

## Ecommerce Industry Traffic Trend

Global 2019-2023



Source: Semrush .Trends



While COVID undoubtedly added momentum to ecommerce growth, expansion of the industry has continued even as the intensity of the response to the global pandemic has decreased.

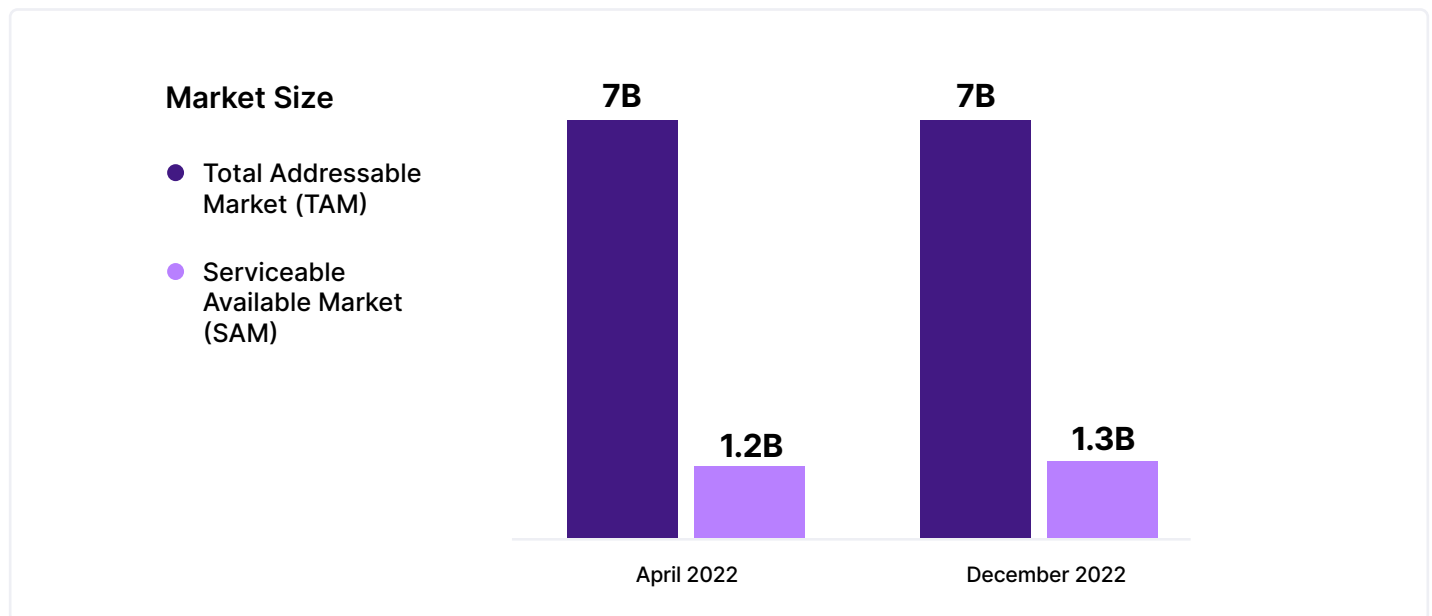
- A top massive gains seen in 2020 and 2021, year-over-year traffic trends showed a steady 2.5% increase in 2022
- While traffic slowed down from previous years in 2022, the three-year average growth remained at an impressive 18%

Looking to 2023, we see positive signs for continued growth. After a dip in traffic during the summer months of 2022, traffic rates made a full recovery by the start of 2023.

- By the end of Q1 of 2023, traffic was up 8% in the ecommerce industry
- Traffic highs in March of 2023 were higher than all of 2022 and nearing all-time industry highs seen in December of 2021
- Looking at seasonal trends, 2023 could be another record breaking year for the industry, especially when the year-end shopping season is taken into account

## Ecommerce Market Growth

Global 2022



Source: Semrush .Trends



As the Market Size graph shows, the SAM for the ecommerce industry grew by 100M between April and December of 2022, which reflects the massive growth the industry sees around the holiday season.

Overall, trends in the ecommerce industry traffic suggest a continued upward trajectory, even as the pandemic continues to fade into the background of consumers' lives. While we may not see the steep upticks in traffic witnessed in 2020 and 2021, 2023 is poised to show continued growth, with the potential to bring industry traffic to new all time highs.

# Ecommerce Industry Traffic Share by Country

Between 2022 and 2023, the ecommerce industry witnessed some significant shifts in traffic share by country. The U.S. maintained its position as the leader across both years with a wide lead on the other countries listed.

Looking at [growth in the industry's digital advertising spending in the U.S.](#) ↗ provides a clear view of the breadth and growth of the industry in the U.S. Since 2019, ad spending has more than tripled, going from 12.5B in 2019 to an estimated 38.4B by 2024.

Between 2022 and 2023, however, the U.S. has seen a significant drop in traffic share while other countries have witnessed strong gains. Comparing traffic stats between 2022 and 2023 reveals some significant shifts.

## Ecommerce Industry Traffic Share by Country

2022-2023

Country	Traffic Share 2022	Country	Traffic Share 2023
United States	50.22%	United States	31.21%
Germany	4.14%	India	8.43%
United Kingdom	4.12%	Germany	5.22%
France	3.15%	United Kingdom	4.98%
India	3.05%	Brazil	3.58%
Brazil	2.75%	France	3.42%
Japan	2.08%	Turkey	3.06%
Italy	1.98%	Japan	2.54%
Spain	1.97%	Philippines	2.45%
Netherlands	1.58%	Spain	2.21%

Source: Semrush .Trends

- Over the last year, the U.S. saw a 19% decrease in traffic share year-over-year, dropping from 50% in 2022 to 31% in 2023.
- India experienced a significant increase in web traffic from 3.05% in 2022 to 8.43% in 2023, making it the second-highest country for web traffic in 2023. This upward movement knocked Germany into spot number 3 on the list.
- The Philippines made the top 10 list for web traffic to ecommerce domains in 2023, capturing 2.45% of the global traffic share. The Philippines represents [one of the fastest growing ecommerce markets ↗](#) across the globe.
- Spain, the Netherlands, and Italy saw traffic shares decrease in 2023. All three European countries lost their spots on the top 10 list.

Overall, global ecommerce traffic shares are seeing major shifts in 2023. The US, which has historically held the top spot, experienced significant losses, along with several European countries that have traditionally captured a large share of the market.

In 2023, the countries making the biggest moves are located in Asian markets. With economies in [India ↗](#) and [The Philippines ↗](#) continuing to show resilience and growth in the face of global economic uncertainty, they represent a tremendous opportunity for the ecommerce industry in 2023 and beyond.

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# The Ecommerce Industry Market Landscape



Through the pandemic, an increasing consumer focus on ecommerce was a major boon for companies prepared to meet their needs. In 2020, the companies that saw the most revenue growth—which included the likes of Amazon and Ebay—witnessed [profits soar into the double digits ↗](#) across the board.

With so much money on the table, many brick-and-mortar companies turned their attention to digital markets. For example, brands like Walmart and Target stepped up their ecommerce game and saw [massive growth ↗](#).

But as the playing field has become more crowded, competition has grown, leading to a fierce competitive playing field as we move into 2023.

## The Top Global Ecommerce Players

In the global ecommerce market, the dominance of US-based businesses is still evident, with amazon.com, ebay.com, and walmart.com among the top players. However, the industry is constantly evolving as smaller players emerge as serious competitors.

By analyzing the traffic data for 2022 and 2023, we can identify some significant trends shaping the global ecommerce landscape.



## Top 10 Ecommerce Industry Players

Global 2022-2023

Domain	Average Monthly Values 2023	YoY Change (2022-2021)	YoY Change (2023-2022)
amazon.com	2.84 B	4.75%	0.94%
aliexpress.com	845 M	9.22%	43.87%
walmart.com	748.1 M	5.74%	35.82%
ebay.com	699.9 M	-17.30%	15.93%
etsy.com	496 M	12.20%	9.93%
amazon.de	490.1 M	5.63%	16.22%
amazon.co.uk	389.9M	3.34%	20.22%
rakuten.co.jp	382.7M	-8.33%	16.52%
flipkart.com	291.9 M	3.08%	89.86%
lazada.com.ph	287.1 M	-18.04%	197.87%

Source: Semrush .Trends



- While two of the three top domains in terms of traffic were U.S. companies—amazon.com and walmart.com—the largest year-over-year growth was seen by China-based aliexpress.com with a huge 44% increase.
- The leaders in terms of traffic growth were both based in Asian markets. India-based e-tailer flipkart.com saw a significant 90% increase in traffic. The winner, however, was lazada.com.ph, which saw growth near 200% driven by the Philippine market.
- Amazon.com dominated the list, winning spots in the US, German, and UK markets, though growth was not equal across the board. While German and UK markets saw growth of 16% and 20%, respectively, year-over-year growth in the U.S. was less than 1%.
- For 2023, all of the companies in the top 10 saw positive growth, with 80% showing double- or triple-digit increases. This appears to be a major shift toward growth after slim gains in 2022.

When looking at individual players on a global scale, similar trends emerge. While U.S. and European brands saw growth, the list leaders in terms of traffic growth were focused on Asian markets. Overall, the strong increases among the top players suggest 2023 could turn out to be a much better year than 2022 for the industry.

## The Top U.S. Ecommerce Players

Although many of the top U.S. ecommerce players also appear on the global list, their year-over-year growth rates have been less impressive. This trend mirrors the overall decline in U.S. ecommerce traffic, which has dropped by 19% from 2022 to 2023.

While the data showed only the slightest of increases in traffic so far in 2023, some potential winners and losers have begun to emerge.

### Top 10 Ecommerce Industry Players

U.S. 2022-2023

Domain	Average Monthly Values 2023	YoY Change (2022-2021)	YoY Change (2023-2022)
amazon.com	1.92 B	5.88%	-8.75%
walmart.com	712.38 M	6.37%	39.09%
ebay.com	478.02 M	-17.57%	12.91%
etsy.com	238.6 M	6.47%	-10.34%
homedepot.com	153.92 M	-13.66%	-10.23%
bestbuy.com	137.43 M	-17.90%	-9.92%
target.com	136.17 M	-16.62%	-18.06%
lowes.com	104.99 M	-17.25%	-2.98%
aliexpress.com	89.28 M	29.56%	33.10%
cvs.com	77.74 M	-16.61%	-15.43%

Source: Semrush .Trends

- Amazon.com, with almost 2B total traffic in the US, declined by 9% in 2023, while walmart.com saw nearly 40% in gains. Walmart.com's ecommerce strategy has shown success, as both companies had similar growth rates in 2022.
- Aliexpress.com has seen year-over-year gains of 33% so far in 2023, marking the brand as one of the leaders in the US. Though monthly traffic remains well below that of list leaders, continued growth at the rate could boost the brand toward the top of the list in years to come.
- Target.com (-18%), homedepot.com (-10%), and cvs.com (-15%), all saw double-digit declines in 2022 and 2023. These brick-and-mortar brands may be losing traction as the world stabilizes after COVID.

The U.S. ecommerce market has seen a decrease in traffic, impacting the growth rates of top players. walmart.com and aliexpress.com appear to have a strong footing for 2023, while brick-and-mortar focused businesses such as target.com, homedepot.com, and cvs.com have struggled. This highlights the challenge of increased competition from brands focusing on ecommerce.

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# Ad Spending for Top U.S. Ecommerce Players

When considering the top 10 players in terms of ad spending in 2022-2023, the list looks slightly different. In total, the industry leaders spent 3.5B in advertising, with a massive range of spends anywhere from 41.3M to 1.7B.

Looking at the individual players with Data from [Semrush's AdClarity App](#) , some interesting metrics appear.

## Estimated Ad Spending Among Top Ecommerce Players

U.S. 2022-2023

Domain	Estimated Ad Spending, U.S. May 2022-March 2023
amazon.com	\$1.7 B
walmart.com	\$414.6 M
ebay.com	\$112.5 M
etsy.com	\$88.5 M
homedepot.com	\$166.3 M
bestbuy.com	\$33.3 M
target.com	\$603.9 M
lowes.com	\$17.2 M
aliexpress.com	\$322 K
cvs.com	\$41.3 M

Source: AdClarity – Advertising Intelligence



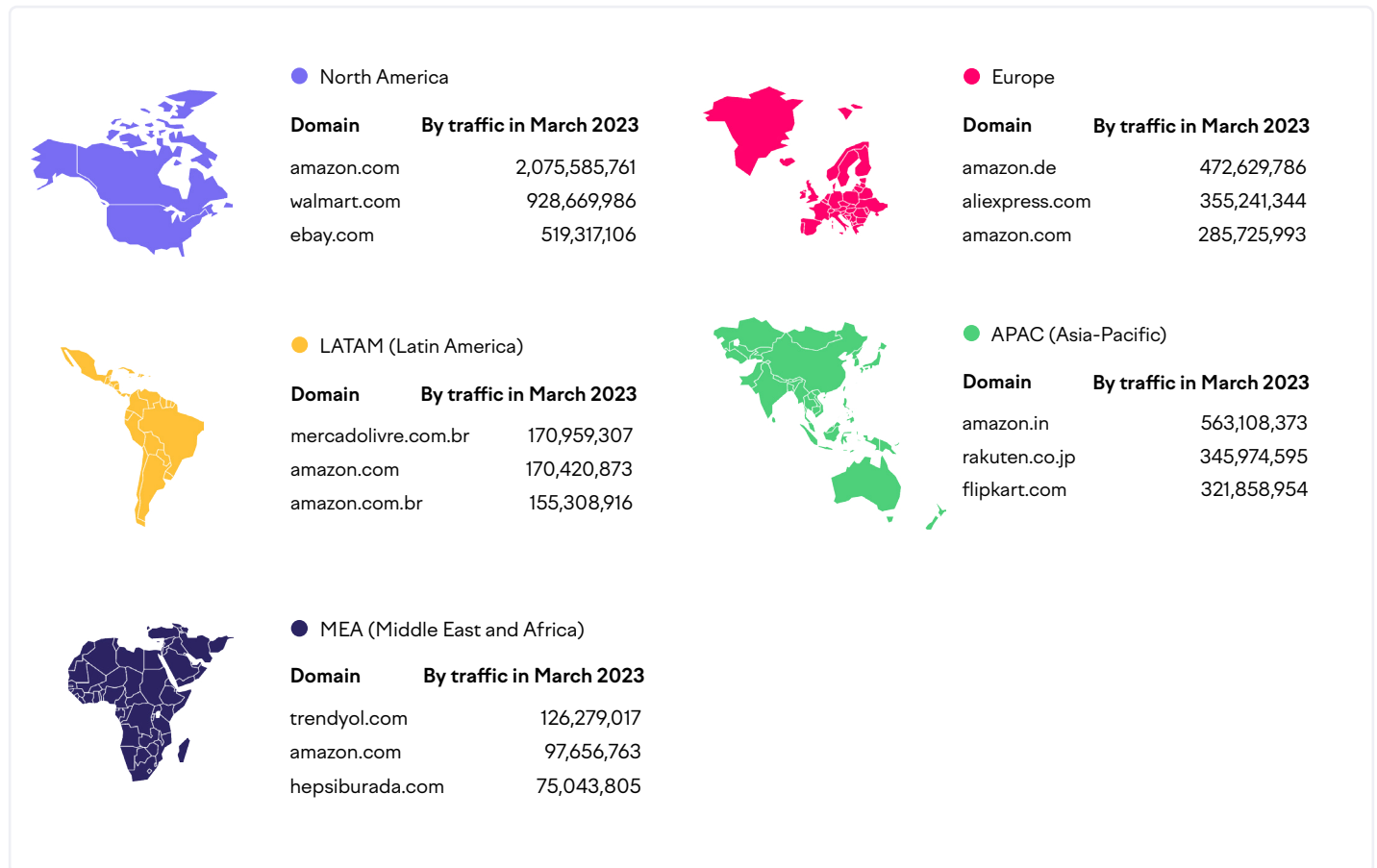
- Amazon.com is the dominant player with an estimated ad spend of \$1.7B, which is more than four times the second-ranked website, walmart.com.
- Aliexpress.com spent the least at only \$322K for the year, which is more than 5000 times lower than the ad spend of amazon.com. Their progress in terms of traffic growth, however, has been astounding.
- Ebay.com, which takes the third spot in terms of traffic, spent less than homedepot.com (\$166M) and target.com (\$604M), showing that ad spend does not beat brand recognition when it comes to traffic.

As may be expected, amazon.com led the list with a huge ad spend to match their massive traffic. But looking beyond the behemoth, some other insights emerge.

Primarily, the data also suggests that brand recognition and other factors may play a more important role than ad spend alone in driving traffic, as evidenced by ebay.com's lower ad spend compared to homedepot.com and target.com, despite being ranked higher in terms of traffic.

# Top Ecommerce Players by Region

The traffic data from March 2023 to the top domains within each region indicates some interesting trends both within specific regions and across regions.



Source: Semrush .Trends



- Amazon.com is a dominant player in the e-commerce market across multiple regions, including North America, Europe, and Asia.
- Regional players are also gaining significant traffic counts in their respective markets, such as trendyol.com in MEA and mercadolivre.com.br in LATAM. The trend in regions with smaller and developing economies suggests that regional players still hold significant sway in their respective markets, and amazon.com may see its overall market share decline in these regions as they continue to grow.
- The top e-commerce websites in each region tend to have significantly higher traffic counts compared to their closest competitors. While it isn't true across the board, this trend suggests there's a significant benefit to holding the top spot.



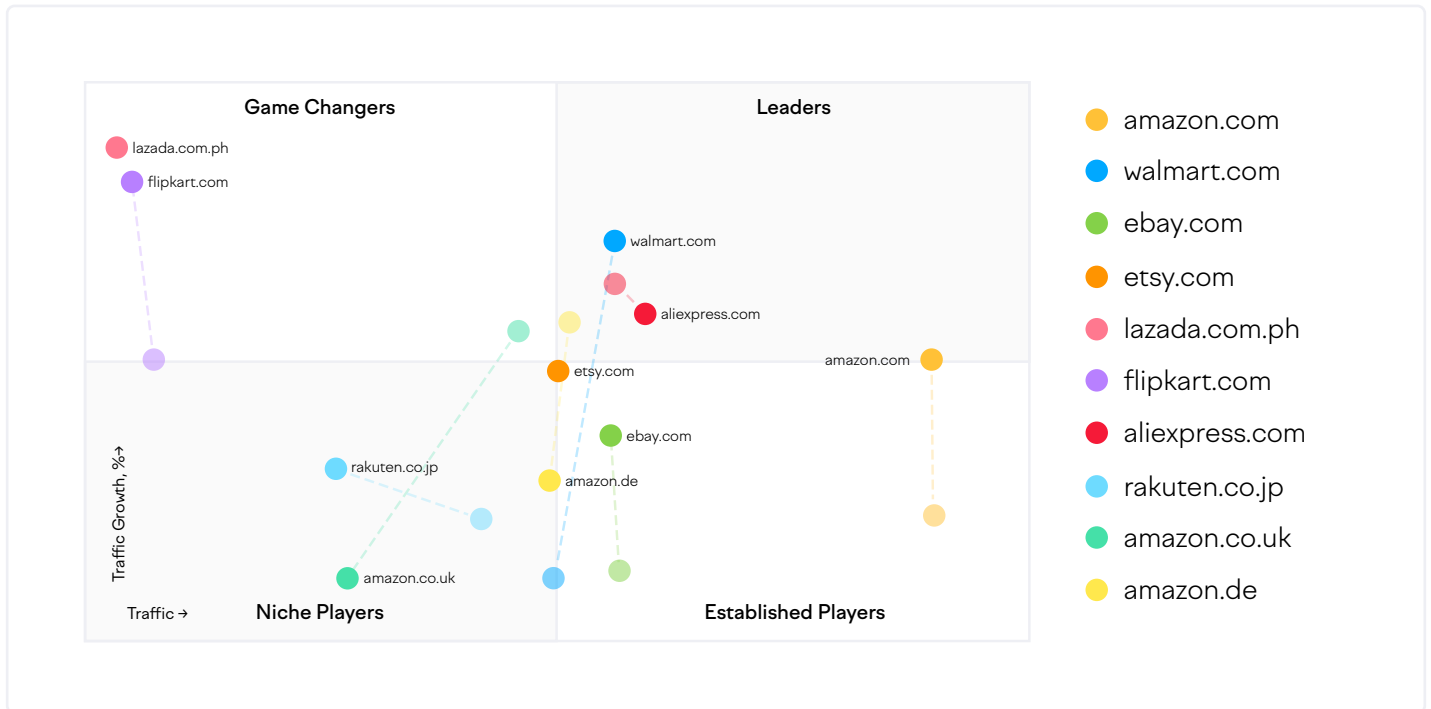
# Ecommerce Market Position Dynamics

Visualizing the competitive landscape helps develop an understanding of market dynamics. We've mapped the top 10 players onto a competitive matrix according to their domain traffic and traffic growth rate comparing growth in January through March of 2022 against the same period in 2023.

Globally, when comparing January-March of 2022 against the same period in 2023, we see some clear trends emerge.

## Top Ecommerce Industry Players' Market Position Dynamics

Global 2022-2023



Source: Semrush .Trends



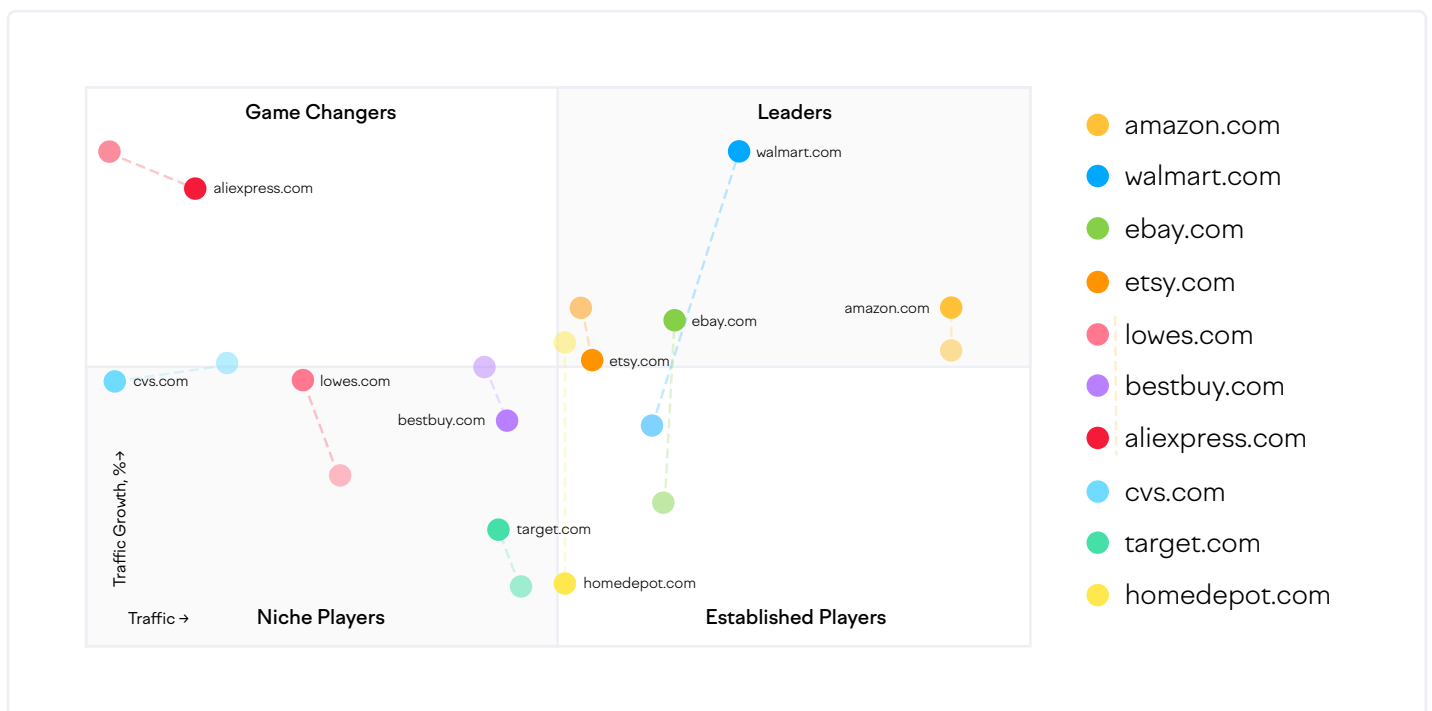
- Flipkart.com and lazada.com.ph are both Game Changers. Flipkart.com saw significant traffic growth in 2023 and both players are expected to have a big impact on the growing Asian market.
- Walmart.com made the biggest jump from niche player to market leader globally, with aliexpress.com maintaining its leader position with slightly slower growth in 2023.
- While amazon.com continues to be a global leader, their German and UK domains saw a decrease in traffic growth. Overall, the online retailer has maintained its dominance, though threat from other players remains a reality.

# The U.S. Ecommerce Competitive Landscape

Looking specifically at the ecommerce landscape in the US, a slightly different set of players dominate the market. While some of the major market leaders remain in place, some important distinctions emerge, especially in the Game Changers and Niche Players categories.

## Top Ecommerce Industry Players' Market Position Dynamics

U.S. 2022-2023



Source: Semrush .Trends

- The leaders category includes etsy.com, ebay.com, walmart.com, and amazon.com for the highest traffic volumes. walmart.com is the clear leader for increases in traffic percentages compared to the previous period, with ebay.com not too far behind.
- In the Game Changers category, China-based aliexpress.com poses the biggest threat to market leaders.
- Retailers with a dual focus on brick-and-mortar shopping experiences didn't fare as well as online only retailers. Cvs.com, lowes.com, bestbuy.com, and target.com all fell into the Niche Players category, with cvs.com and bestbuy.com seeing negative traffic growth rates.

Comparing global and U.S. ecommerce landscapes reveals some trends. U.S. leaders are also global leaders due to the country's significant share of the global ecommerce market. However, Game Changers like flipkart.com and lazada.com.ph are more influential globally, while aliexpress.com makes the biggest impact in the US. This highlights the need for ecommerce businesses to consider regional differences when developing strategies.











# Apps Data




Mobile data is becoming increasingly important in the ecommerce industry, as mobile usage is on the rise again in 2023 after a slight decline in the previous year. In particular, mobile apps are now the primary channel for consumers to shop online, highlighting the significance of app data for businesses in this space.

# The Top 10 Ecommerce Mobile Apps Worldwide

The list of top shopping apps showed some familiar trends. That said, the list also included some unexpected names. Here's a look at the Top 10 as determined by [research conducted by Apptopia in 2022](#) ➔.

10 Most Downloaded Shopping Apps Worldwide					
#1		Meesho 127M	#6		Flipkart 50M
#2		Shopee 118M	#7		Pinduoduo 37M
#3		SHEIN 117M	#8		Lazada 36M
#4		Amazon 81M	#9		Alibaba 30M
#5		Shopsy 64M	#10		Mercado Libre 28M

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- The top three apps in terms of global downloads were Meeshoo, Shopee, and Shein. All of these apps are owned by companies based in China and primarily serve users throughout markets across Asia.
- While Amazon tops the charts in terms of traffic volume, it came in fourth place in terms of downloads. Likewise, Flipkart, Lazada, and Mercado Libre came in on the lower half of the list.
- While brands like Walmart and Aliexpress remain chart toppers when we consider traffic volume, they don't even make the list of top 10 shopping apps in terms of [downloads](#) ➔.

A mobile app strategy is an important component of any ecommerce business strategy. As shoppers depend more and more on their phones to meet their shopping needs, brands without a strong mobile app will undoubtedly lose out.

When looking at shopping apps as a category compared with other kinds of apps, there are some important trends to note, as shown in this data from Semrush App Center partner, [Mobile App Insights](#).

## Conversion and Tap Through Rates by App Category

Global 2023



Source: Mobile App Insights

# Apple Search Ads Benchmark Report by App Category

Global 2023

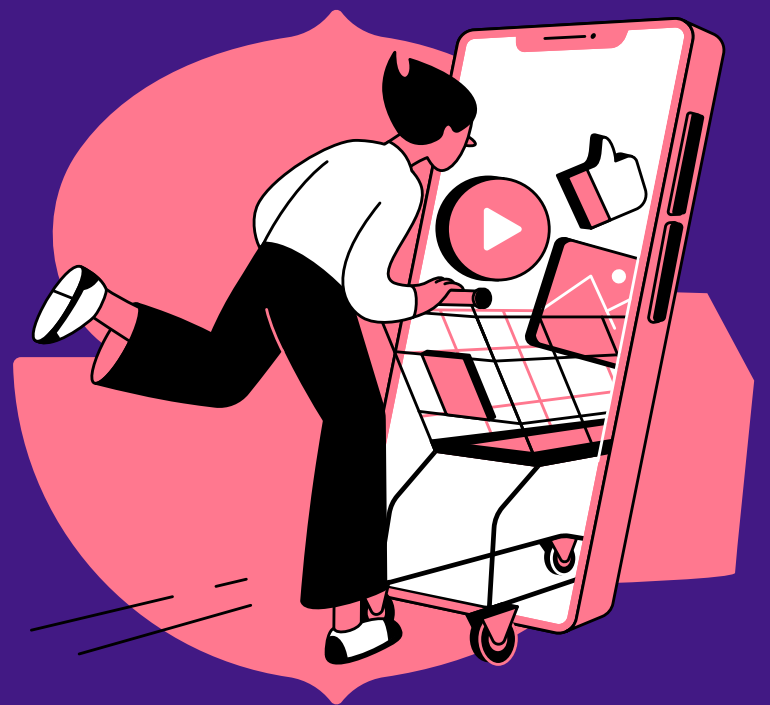
	Cost Per Acquisition (CPA)	Cost Per Tap (CPT)	Conversion Rate (CR)	Tap Through Rate (TTR)
	<b>\$ 2.18</b>	<b>\$ 1.16</b>	<b>53.23%</b>	<b>5.26%</b>
March 01, 2023 - March 31, 2023				
Category	CPA	CPT	CR	CR
Books	\$ 3.11	\$ 1.45	46.47%	4.12%
Business	\$ 0.85	\$ 0.54	64.37%	7.62%
Education	\$ 2.82	\$ 1.57	55.68%	5.86%
Entertainment	\$ 0.78	\$ 0.48	61.44%	11.55%
Finance	\$ 2.62	\$ 1.49	56.88%	4.37%
Food and drink	\$ 1.32	\$ 0.77	58.72%	2.77%
Games	\$ 4.17	\$ 1.57	37.52%	5.42%
Graphics & Design	\$ 2.38	\$ 1.42	59.69%	7.25%
Health & Fitness	\$ 1.86	\$ 1.04	56.09%	6.87%
Lifestyle	\$ 1.99	\$ 1.01	50.52%	2.12%
Medical	\$ 2.67	\$ 1.54	57.78%	5.16%
Music	\$ 1.03	\$ 0.62	60.25%	5.20%
Navigation	\$ 0.94	\$ 0.61	64.91%	7.21%
News	\$ 4.32	\$ 1.88	43.39%	2.72%
Newsstand	\$ 3.63	\$ 2.45	67.42%	20.73%
Photo & video	\$ 0.59	\$ 0.42	71.81%	7.63%
Productivity	\$ 1.68	\$ 0.94	56.21%	7.86%
Reference	\$ 1.81	\$ 1.08	59.57%	12.40%
<b>Shopping</b>	<b>\$ 2.92</b>	<b>\$ 1.95</b>	<b>66.68%</b>	<b>4.90%</b>
Social Networking	\$ 0.49	\$ 0.38	77.30%	10.76%
Sports	\$ 8.74	\$ 6.28	71.78%	8.25%
Travel	\$ 1.44	\$ 1.09	75.28%	8.59%
Utilities	\$ 1.95	\$ 1.13	57.63%	6.84%
Weather	\$ 1.31	\$ 0.80	61.57%	7.09%

Source: SearchAds.com



- In the shopping category, Costs Per Acquisition (CPA) and Cost Per Tap (CPT) rates tend to be slightly higher than rates for apps in other categories
- Compared to other categories, shopping apps had a slightly higher conversion rate at 67%, and a lower tap through rate just below 5%.

# Ecommerce Shoppers' User Behavior





The pandemic significantly changed consumer behavior and trends seen across marketing channels, but as restrictions ease and anxieties lessen, how have trends shifted? Economic stimulus, rising interest rates, and tightened business budgets all play a role in changing consumer interactions with ecommerce in 2022 and 2023.

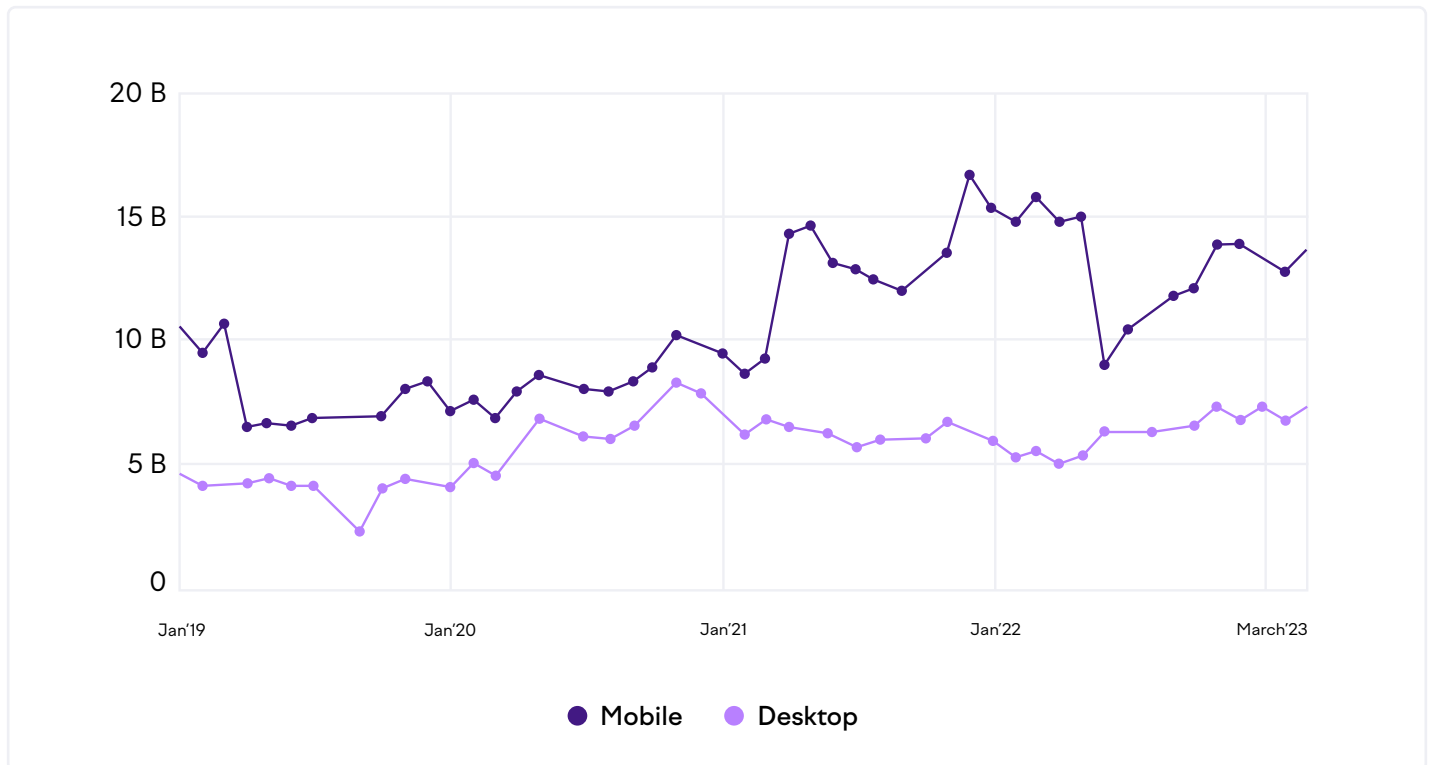
# Ecommerce Industry Traffic Trends by Device (Global)

2020 showed an almost even device penetration, with desktop usage coming close to 50%. Just as the world was slowly rolling back on some pandemic restrictions, the gap widened once again.

By the start of 2022, mobile traffic absolutely dominated the ecommerce industry, with more than 70% of online shoppers surfing ecommerce sites from their phones. This rise of mobile started in early 2021 when we saw unprecedented growth in mobile usage compared to desktop—the last time we saw a similar 70%+ figure for mobile was at the end of 2019.

## Desktop and Mobile Traffic Share Ecommerce Trend

Global 2019-2023



Source: Semrush .Trends



In the summer of 2022, however, we witnessed a significant drop in mobile traffic. This decrease reflects the overall decrease in traffic to the ecommerce market seen in the middle of 2022, likely due to growing [concerns about an oncoming recession and decreasing purchasing power](#) among consumers as pandemic stimulus ran dry.

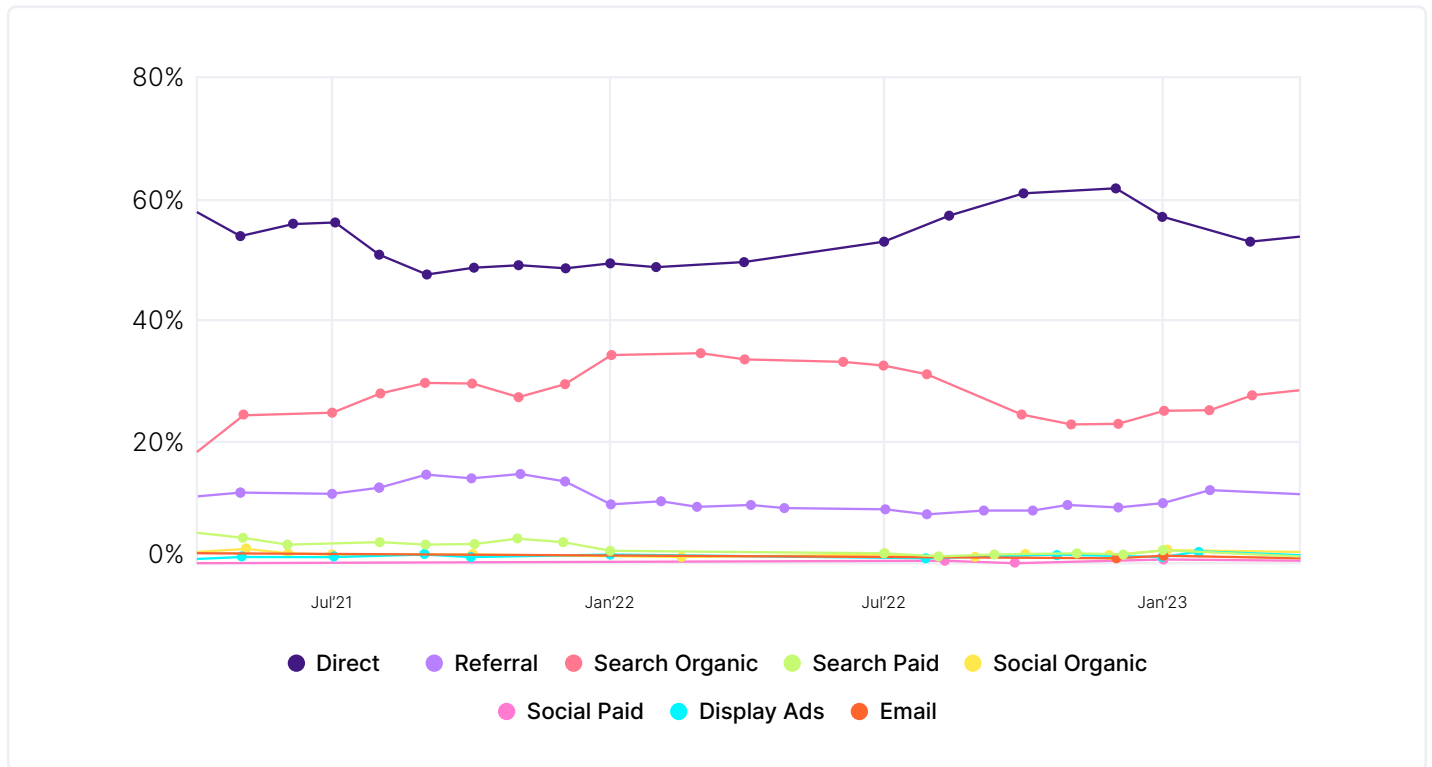
By the end of the year, however, mobile traffic had risen to a level similar to those seen in early 2022. And after a slight decline after the start of the year, they seem to be on the rise again entering the spring of 2023.

# Ecommerce Industry Traffic Trends Global

While the early years of the pandemic brought unprecedented growth to the ecommerce industry in terms of traffic, the distribution among channels showed only slight growth in the Direct channel, and slight declines in the Search and Referral channels. Starting in early 2021, however, distribution of traffic among major channels underwent some volatility that has continued through 2022 and into 2023.

## Ecommerce Traffic Share by Channel Trend

Global 2019-2023



Source: Semrush .Trends



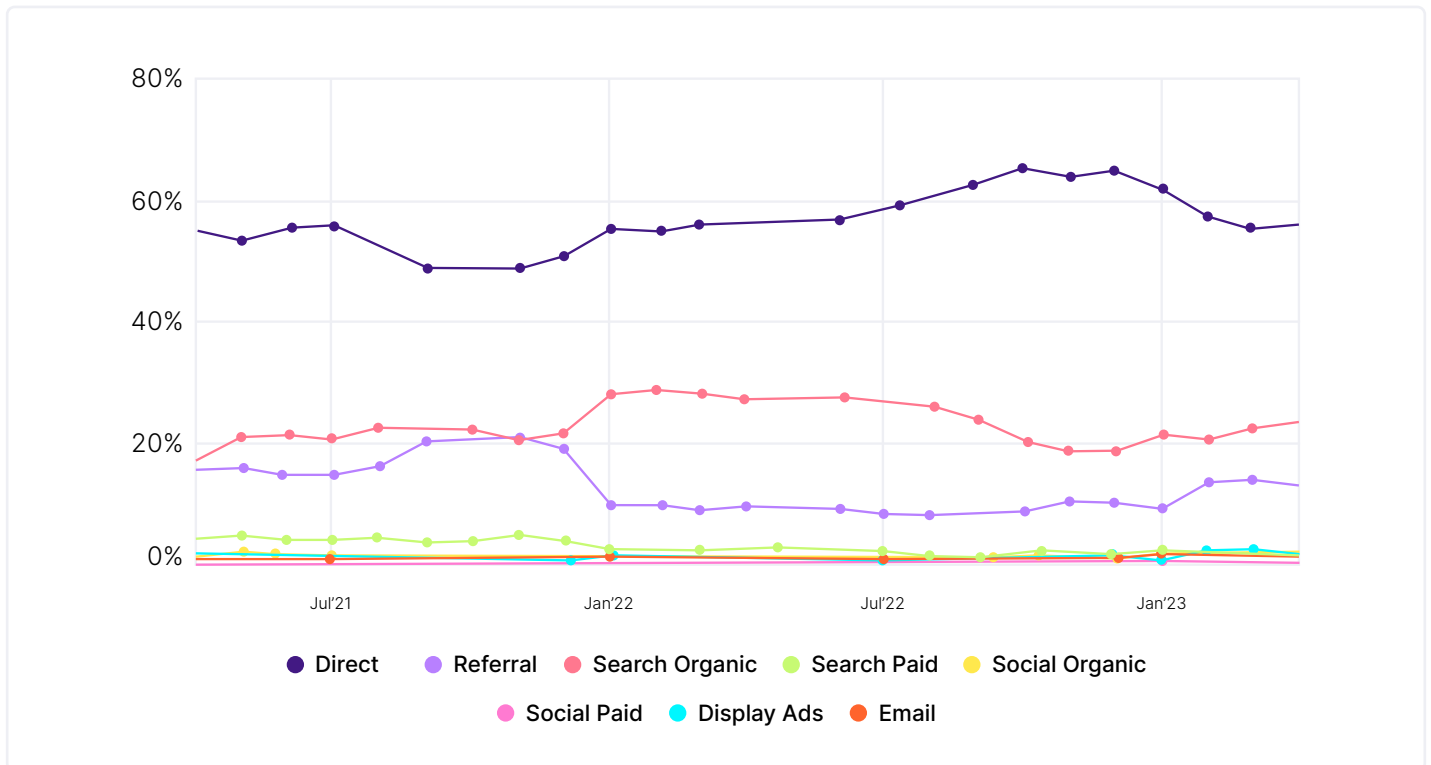
- **Direct**—After a spike in share in 2021, levels have fluctuated through 2022, with a recent downturn at the start of 2023. Regardless of the volatility, Direct accounts for upwards of 53% of all traffic in the ecommerce industry at the start of 2023, meaning brand awareness is still one of the most important components of any marketing strategy.
- **Organic Search**—The second most popular channel, Organic Search witnessed a high in early 2022 near 35%. The channel saw declines through 2022, though 2023 has brought an uptick in traffic through the channel to closer to 30%.
- **Referral**—With a boost through 2021 to a high near 15% in October, Referral traffic saw a decline at the start of 2022, and flatlined through the year. 2023 brought initial signs of an increase with rates around 12%, though in the first quarter, Referral traffic seems to be falling once again.
- **Paid Search**—Accounting for about 2% of ecommerce traffic through 2021, the Paid Search channel saw a decline at the start of 2022. It has remained steadily below 2% through the start of 2023.
- **Organic Social**—Through 2022, Organic Social accounted for less than 2% of the traffic to the ecommerce market. At the start of 2023, however, the channel overtook paid search rising above 2% while Paid Search continued to drop.
- **Paid Social**—Remaining relatively flat through 2022 and 2023, Paid Social contributed less than 1% of traffic to the ecommerce industry. After a slight increase just after the start of 2023, the channel flatlined once again.
- **Email**—Through 2022, Email traffic lingered below 1% of traffic to the ecommerce industry. The start of 2023, however, brought a boost for the channel. Since January, the channel has remained above 1.2%.
- **Display Ads**—Hanging around 1.5% through 2022, traffic from Display Ads has risen above 2% at the start of 2023.

# Ecommerce Industry Traffic Trends U.S.

U.S. trends in the Ecommerce industry closely follow global trends due to the country's large share of total traffic. However, there are some significant differences that businesses should consider when targeting U.S. markets.

## Ecommerce Traffic Share by Channel Trend

U.S. 2019-2023



Source: Semrush .Trends



- In the U.S. 57% is direct (compared to 53% globally), meaning brand awareness is even more important when focusing on U.S. ecommerce markets.
- Organic Search accounts for 23% of ecommerce traffic in the US, while Referral accounts for 13%. These figures are slightly different from the global numbers, which show Organic Search accounting for 28% and Referral accounting for 11% on average.

# Social Media

While overall, social media plays a small role in terms of overall traffic distribution, it can't be ignored. Alongside the traffic it brings to ecommerce domains, it serves many other purposes, including brand awareness, customer engagement, customer acquisition, and customer retention.

When looking at ecommerce specifically in the realm of social media, some recent trends have emerged that those in the ecommerce industry can't ignore. By 2025, [the market for products sold directly through social media could reach \\$1.4 trillion ↗](#) in total. This growth is being driven by a combination of factors, including the increasing popularity of social media platforms, the rise of influencer marketing, and the growth of mobile commerce.

## The Rise of TikTok

While Youtube and Facebook remain the behemoths in the ecommerce industry, TikTok is the next social media platform ecommerce marketers are looking to conquer. Having [surpassed 1B ↗](#) users, the video based platform is changing the social media game.

When looking at audience data from top ecommerce players, we've seen the audience using TikTok more than double.



## Ecommerce Audience Social Media Preferences

Global 2022-2023

All devices		March 2022									
Social Media		amazon.com	walmart.com	ebay.com	etsy.com	aliexpress.com					
YouTube	562.6M	74.92%	140.5M	72.27%	183.6M	82.14%	144.4M	80.01%	192.1M	76.03%	
Facebook	365.1M	48.62%	97.3M	50.05%	130.2M	58.26%	104.2M	57.77%	119.9M	47.46%	
Reddit	275.9M	36.73%	88M	45.27%	95.7M	42.84%	83M	45.98%	56.1M	22.22%	
Twitter	266M	35.43%	74.6M	38.38%	88M	39.38%	75.9M	42.07%	67.5M	26.71%	
Instagram	231.3M	30.81%	62.1M	31.95%	83M	37.14%	76.1M	42.18%	72.2M	28.56%	
LinkedIn	117.5M	15.65%	26.8M	13.79%	36.2M	16.17%	34.5M	19.1%	26.5M	10.5%	
Pinterest	99.7M	13.27%	24.4M	12.53%	33.4M	14.94%	36.2M	20.08%	24.3M	9.62%	
TikTok	92.1M	12.27%	19.8M	10.16%	33M	14.76%	30.7M	17.03%	30.4M	12.03%	

All devices		March 2023									
Social Media		amazon.com	walmart.com	ebay.com	etsy.com	aliexpress.com					
YouTube	728.8M	75.31%	186.7M	63.63%	235.8M	81.94%	198M	79.94%	347.3M	76.11%	
Facebook	495.8M	51.23%	126.6M	43.14%	168.7M	58.61%	148.6M	59.98%	212M	46.47%	
Reddit	345.4M	35.7%	125.2M	42.65%	115.7M	40.2%	106.7M	43.07%	88.9M	19.5%	
Twitter	341.6M	35.3%	101.9M	34.72%	107.9M	37.51%	99.9M	40.31%	125.6M	27.53%	
Instagram	303.1M	31.32%	86.4M	29.45%	110M	38.22%	105.5M	42.6%	133M	29.16%	
TikTok	215.7M	22.29%	62.5M	21.31%	73.8M	25.64%	70.1M	28.3%	98.1M	21.5%	
LinkedIn	140.1M	14.47%	30.2M	10.28%	44.4M	15.42%	43.9M	17.71%	43.4M	9.51%	
Pinterest	105.7M	10.92%	26.5M	9.03%	37.6M	13.07%	42.7M	17.23%	38.8M	8.51%	
Telegram	53.6M	5.53%	5.7M	1.93%	19M	6.61%	12.7M	5.13%	45.1M	9.88%	

Source: Semrush .Trends



What is it about TikTok that makes it such a powerful resource for those in the ecommerce industry?

Along with a growing user base ([35% of whom have made a purchase on the platform ↗](#)) and hard hitting influencers, TikTok provides the tools on the platform to effectively reach audiences.

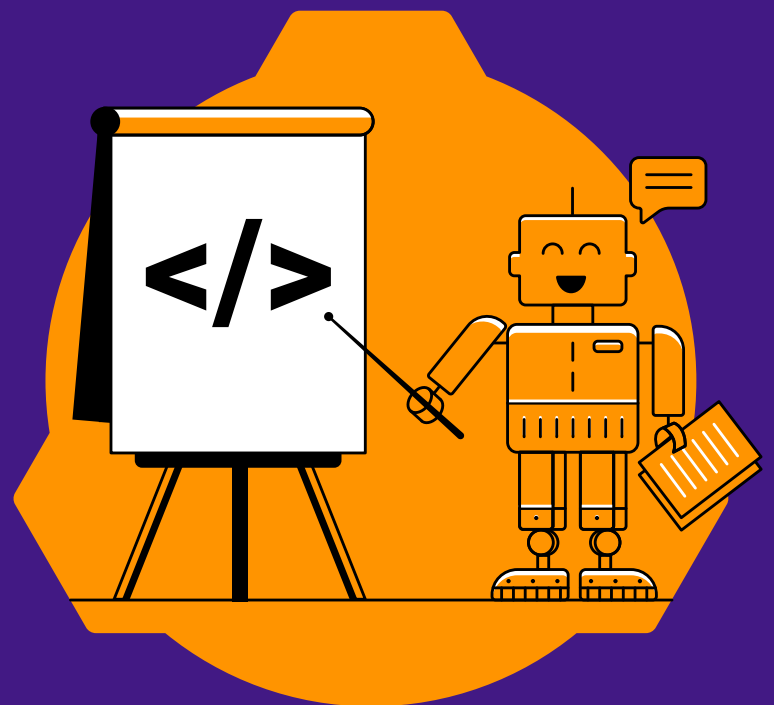
- Companies and creators can build their own TikTok storefronts, and sellers can create web stores quickly through simple integrations with ecommerce platforms
- Hashtag and keyword options allow sellers to improve visibility to high value audiences
- Promoting products on TikTok can help businesses reach a younger audience, with 63% of Gen Z using the app daily

As user numbers and ecommerce functionality continues to grow on the platform, those in the ecommerce industry are sure to miss out if they ignore this rising social media star.

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# Artificial Intelligence, Augmented Reality, and **the Future of Ecommerce**



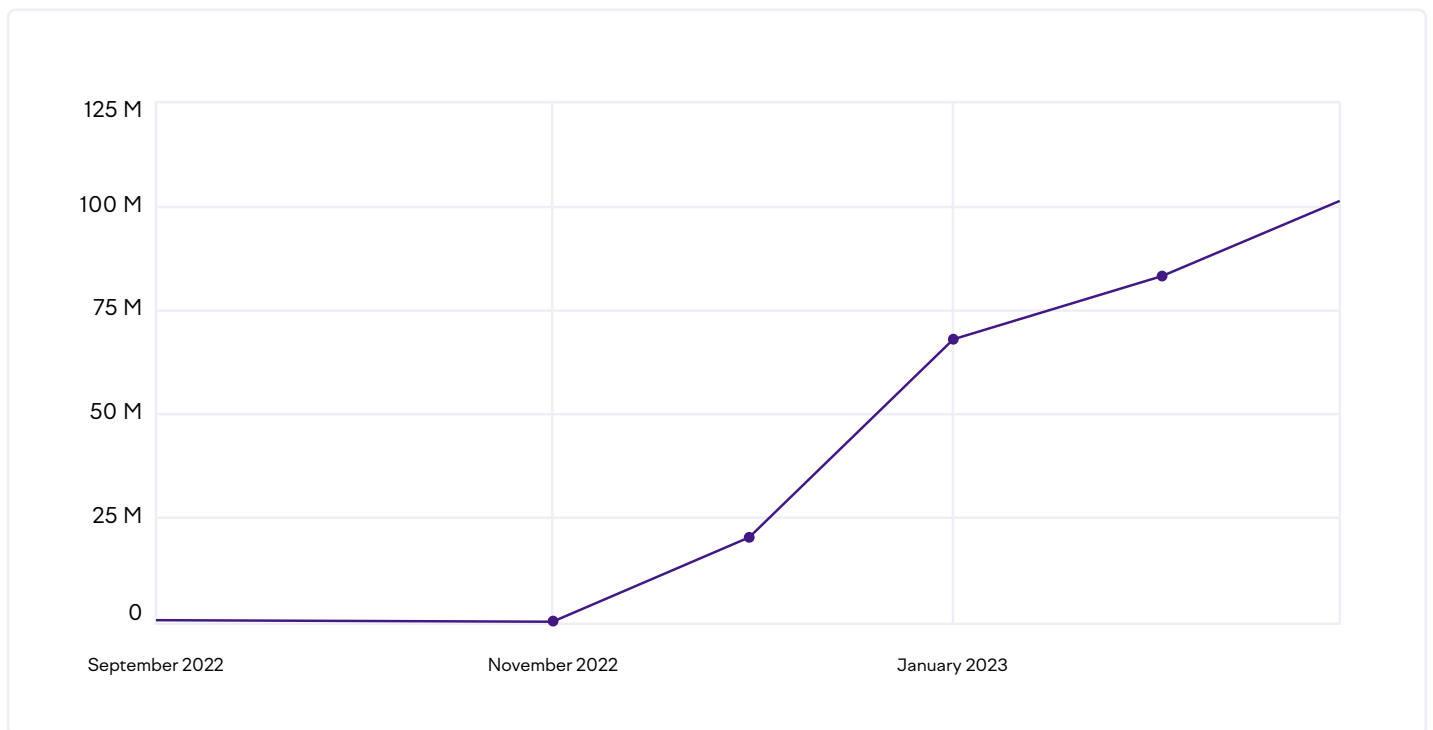


As the use of artificial intelligence (AI) and augmented reality (AR) continues to grow in popularity, [the impact on ecommerce](#) is becoming increasingly apparent. In particular, [the emergence of sophisticated AI chatbots](#) is changing the way customers interact with online retailers.

ChatGPT, a leading language based AI, has gained significant interest recently. The sheer growth in search trends for the AI reflects the massive impact it's having across the globe. Keyword searches went from 10 monthly searches in November 2022 to 101M monthly searches by March 2023.

## ChatGPT Search Volume Trend

Global Q3 2022- Q1 2023




Source: Semrush .Trends



AI and AR are significantly impacting the ecommerce market in 2023 with rapid advancements in language models, computer vision models, and machine learning. These technologies are providing personalized customer experiences, automated customer service, improved ad targeting, and enhanced operations.



## Personalized Experiences

AI can help businesses analyze customer data to provide personalized product recommendations that are tailored to each individual shopper's preferences, optimize pricing for shifts in the market, and customize customer experiences with their brand.

For example, [Netflix's recommendations engine \(NRE\)](#)  uses AI algorithms to filter content based on each user's profile, analyzing data from each customer visit and click to create hyper-personalized recommendations.


## Improved Operations

From supply chain management to inventory adjustments, AI and AR technologies allow ecommerce businesses to stay ahead of challenges and make sure they meet their customers needs without burning out employees and wasting resources in the process.

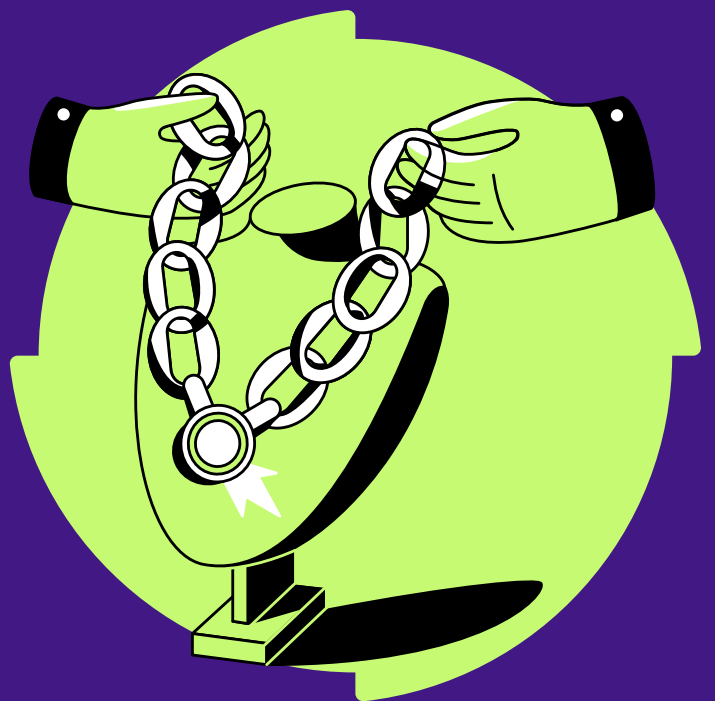
Brands like [Zara](#)  and [IKEA](#)  use AR to allow customers to try on beauty products and view furniture inside their homes. In doing so, they can limit their returns which saves resources for their companies and prevents good products from entering the wastestream.

## Customer Service

By using Natural Language Processing (NLP) models, AI can understand and interpret customer queries, provide relevant responses, and even make product recommendations. Predictive analytics can also be used to analyze customer data and anticipate future needs, enabling businesses to tailor their marketing strategies and product offerings accordingly. The result is an improved customer experience and increased sales.

For example, [Sephora's partnership with Modiface](#)  allows customers to sample makeup in AR before making a purchase and their chatbot can provide personalized product recommendations, makeup tips, and tutorials. The chatbot can also help customers find nearby stores, book appointments, and track their rewards points.

# Most Wanted Products and Calls-to-action












For any business looking to thrive in the ecommerce space, knowing what consumers want should be top of mind. Even if top products don't fall within your particular market niche, understanding customer desires and how calls-to-action work can influence decisions when it comes to your strategy.

# Ecommerce Industry Top Products

When looking at top products among the top players in the ecommerce industry, some clear trends come into focus.

## Ecommerce Top Products

U.S. 2022-2023

amazon.com		walmart.com	
Product	Monthly Traffic	Product	Monthly Traffic
 The Lord of the Rings: The Rings of Power	1,557,722	 TUMERICA, REPAIR SERUM 2 OZ	1,552,821
 Apple AirPods Pro (2nd Generation)	743,465	 OXY Maximum Strength Deep Pore Cleansing Pads	590,157
 PlayStation 5 Console	377,385	 1Pcs Blue Interactive Cat Toothbrush Pet	561,871
ebay.com			
Product	Monthly Traffic		
 AMD Ryzen 7 5800X3D 8-core 16-thread Desktop	140,622		
 Adidas Ultraboost 22 Shoes Men's	135,658		
 Adidas Duramo 10 Running Shoes Men's	134,774		

Source: Semrush .Trends

- The top product across all three domains was the Amazon Original series Lord of the Rings: Rings of Power. Monthly traffic to the product was close to 1.6M.
- For each of the top players, the most popular products fall into distinct categories. Amazon.com featured an original series, walmart.com featured a skincare product, and ebay.com featured a computer processor.
- Electronics were the most popular category of product that appears in the top three for these retailers. Apple Airpods, Playstation 5, and the AMD Ryzen 7 Desktop processor all appeared across each of the lists

The popularity of these products and categories offers insight into the purchasing behavior and interests of online shoppers, and is valuable information for businesses looking to succeed in this competitive market.

## Top Emotional Triggers Featured in Leading E-Tailers' Ads

Each marketplace has its own triggers that appeal to consumers and inspire engagement with the product ad and choose one platform over another.

We've analyzed hundreds of digital ads from the top e-tailers in the U.S. and pinpointed the most popular CTAs within their ad copies. Some useful trends emerge when looking across domains.



## Ecommerce Top Emotional Triggers

U.S. 2023

### amazon.com

- find deals
- best sellers
- find best
- customer reviews
- reviews find

### ebay.com

- huge selection
- featured collections
- free shipping
- buyer protection
- protection program

### walmart.com

- free shipping
- low prices
- store pickup
- free store
- millions items

### lowes.com

- free delivery
- buy online
- online pickup
- pickup store
- store get

### homedepot.com

- free store
- store pickup
- shop home
- free returns
- diy projects

### bestbuy.com

- free shipping
- curbside pickup
- home install
- top deals
- store pickup

### aliexpress.com

- free shipping
- buyer protection
- great value
- safe payment
- check deals

### etsy.com

- one kind
- free shipping
- everyday supplies
- talented creators
- ready ship

### target.com

- free shipping
- day delivery
- store pick
- day store
- ship free

### cvr.com

- online store
- store cvs
- find relief
- relief online
- store online

- Free shipping" and "store pickup" are consistently effective trigger words across all domains. Low prices and finding deals are also popular among ecommerce websites, with many featuring best sellers and huge selections of products.
- For more specialized domains, such as etsy.com and homedepot.com, unique trigger words are utilized to appeal to specific customer bases. Etsy emphasizes "one-of-a-kind" and "talented creators", while Home Depot promotes "DIY projects" and "ready to ship" items.
- Buyer protection and easy returns are emphasized on aliexpress.com and cvs.com, respectively, indicating a focus on customer satisfaction and trust.

Overall, the most impactful trigger words vary depending on the domain, but many ecommerce websites emphasize free shipping and store pickup, low prices, and finding deals to attract customers.

# The Giant on the Market: Analyzing Amazon.com for Insights





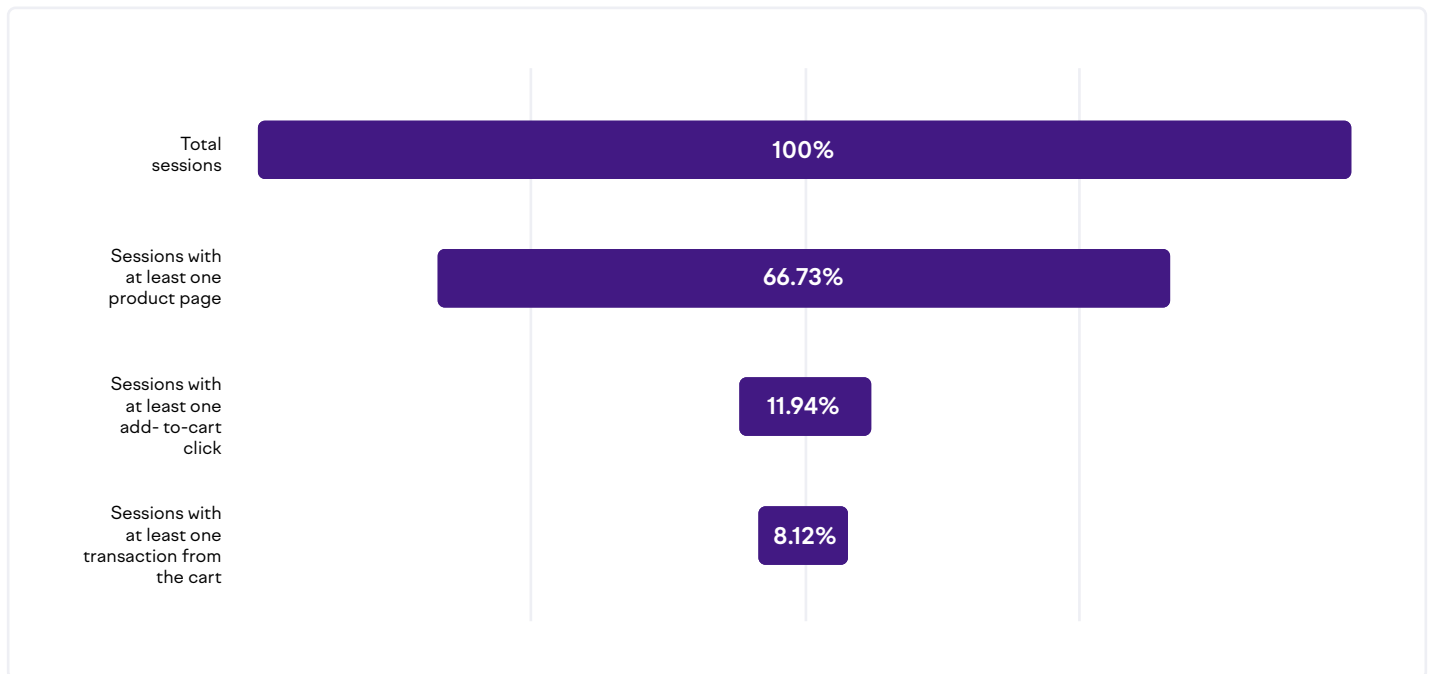
In today's competitive ecommerce landscape, amazon.com has emerged as the undisputed leader. With a staggering 37.8% market share as of 2022, amazon.com has managed to maintain its stronghold in the market despite stiff competition. Boasting a global customer base of over 300 million users, amazon.com has effectively revolutionized the way people shop online.

## Average Funnels

When people visit Amazon.com, approximately 67% of them check out a product page. In around 12% of the visits, users add at least one item to their cart, and in about 8% of the visits, users complete the purchase after adding items to their cart.

### Amazon.com's Transaction Funnel From Cart

2022



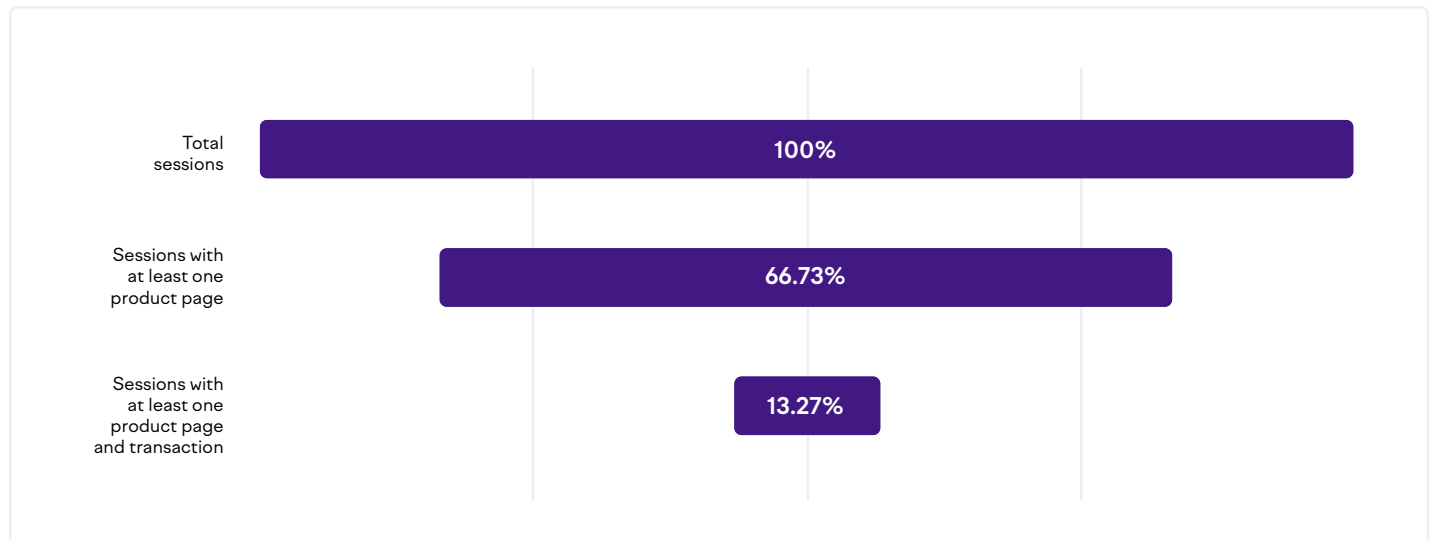
Source: Semrush



About 13% of sessions result in transactions (either directly or from the cart) after visiting Product Pages.

## Amazon.com's Product Pages & Transaction Funnel

2022



Source: Semrush



Estimates place the [average ecommerce conversion rate](#) <sup>↗</sup> between 2-3% in 2022. With this in mind, Amazon.com's conversion rate is quite impressive. This data is not only useful for those who want to carve away their piece of the market from amazon.com, but also for those considering partnering with the behemoth to grow their ecommerce businesses.

## "Special Occasions" Funnels

Amazon.com has "special days" that have a big impact on customer behavior. Here's a look at the metrics for the daily average, benchmarked against Amazon.com's biggest shopping days.

## Amazon.com “Special Occasions” Funnel

Global 2022

Stats	Daily Average	Prime Day	Prime Early Access Sale	Black Friday & Cyber Monday	Christmas and New Year Season
clicks per session	15.0	18.8	16.0	16.3	14.8
cart transactions per session	0.1	0.2	0.1	0.1	0.1
cart clicks per session	0.2	0.4	0.3	0.3	0.2
product pages per session	3.3	4.6	3.9	4.2	3.7
search pages per session	2.0	2.6	2.3	2.6	2.2
cart clicks per transaction	1.7	1.7	2.1	2.2	1.2
product pages per transaction	6.1	7.4	6.7	7.2	6.9
product pages per cart click	4.3	5.0	3.6	3.8	6.0
search pages per transaction	3.2	3.6	3.5	3.9	3.4
search pages per cart click	2.2	2.4	1.8	2.1	3.0

Source: Semrush .Trends



From this data, we can pull out some interesting insights and trends.















- On average, the daily average for clicks per session is at 15%.
- Prime Day has the highest clicks per session at 19%. This is likely due to customers shopping around and looking for deals, which can lead to great exposure for sellers.
- Black Friday and Cyber Monday had the second highest clicks per session at 16%, and also the highest cart clicks per transaction. This suggests customers are adding more items to their cart or are considering multiple options before making a purchase.
- Christmas and New Year season showed the largest number of product pages per cart click. This may suggest that customers are taking more time to consider their purchase decisions and are conducting more research before making a purchase.

# Top Trending Products on Amazon.com in 2022-2023 by Month

With the help of [Keyword Wizard app for Amazon](#) ↗, we looked at the top 12K most searched products on amazon.com and compared their month-over-month search volumes to identify which items saw the highest monthly surges in interest.

## Amazon.com's Top Trending Products

Global 2022-2023

Month	Product	MoM Growth	Month	Product	MoM Growth
February '22	 disney cutie cuff	4,052,900%	September '22	 haynuts leggings	2,011,275%
March '22	 omkagi biker shorts	1,372,175%	October '22	 white key fob cover	105,687%
April '22	 mohawk putty stick	1,365,000%	November '22	 rain cloud diffuser	187,469%
May '22	 generic rubber beach bag	26,091,200%	December '22	 aa batteries 24 pack+	50,555%
June '22	 awesome fathers day gifts	143,333%	January '23	 kids valentines day gifts	14,646%
July '22	 smart register vent	5,077,600%	February '23	 dr seuss costumes for kids	10,944%
August '22	 beaushiny water wave wig	113,603%	March '23	 air essentials jumpsuit	800,400%

Source: Keyword Wizard app for Amazon

From this data, a few trends and insights appear that may be helpful for ecommerce businesses as they think about their strategy across the year.

- **Seasonal trends:** Many of the trending products on amazon.com were seasonal or holiday-related, such as a beach bag trending in May and the Valentine's Day gifts in January.
- **Virality:** Some amazon.com trending products may have gone viral on social media or online platforms, like Omkagi Biker Shorts in March, possibly due to influencer or celebrity promotion.
- **Niche products:** Many trending products were relatively niche or unique, such as the Mohawk Putty Stick, the White Key Fob Cover, suggesting a market for specialized or unique products on amazon.com.

## Top Products on Amazon.com in 2022-2023

In 2022 and early 2023, we no longer see the masks that became so familiar through the pandemic. Instead a wide variety of products appear with a few important categories including electronics, clothing, and office furniture.



## Amazon.com's Top 30 Product Keywords

Global 2022-2023

Keyword	Sum (March 2022 - February 2023)	Keyword	Sum (March 2022 - February 2023)
iphone 13 pro max case	19,629,501	ps5	13,152,754
apple watch band	18,999,134	iphone	12,967,353
dresses for women 2022	18,555,237	ipad	12,795,172
laptop	16,850,651	nintendo switch	12,640,006
iphone 13 case	16,532,116	air fryer	12,413,065
squishmallow	16,303,226	womens tops	12,394,321
crocs	16,096,817	car accessories	12,087,504
summer dresses for women 2022	15,968,219	dresses	12,049,423
desk	14,861,899	gaming chair	11,967,990
shower curtain	14,639,232	backpack	11,488,740
water bottles	14,305,968	office chair	11,373,370
lego	13,517,272	headphones	11,249,246
airpods	13,505,466	swimsuit women	11,156,230
phone 11 case	13,368,219	wedding guest dresses for women	11,114,195
apple watch	13,175,698	shoe rack	10,783,457

Source: Semrush .Trends

Here are a few trends that emerge across the list of the 30 most searched products on amazon.com.

- Apple products are very much in demand, as in 2021—there were 8 products associated with the brand in the top 30.
- The second biggest category of products includes different kinds of clothing. Dresses were most popular, though swimsuits for women and wedding guest dresses for women were also on the list.
- Office accessories were among the biggest winners on the list between 2022-2023. On the list we see searches for gaming chairs, desks, and office chairs.

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# Insight-driven Recommendations for Shaping Your Future Ecommerce Marketing Strategy

As the ecommerce industry continues to evolve in the years following the peak of the COVID-19 Pandemic, those in the industry are facing new opportunities and challenges. While the industry has continued to see strong growth through 2022 and into 2023, those hoping to win the market will need to keep a close watch on emerging trends so they can keep pace.

From shifting social media landscapes to advancements in AI technology, the ecommerce market will undoubtedly continue to evolve in the years to come. Here are our main takeaways based on the data covered in this report.

## The Industry Is Poised to Grow

The ecommerce industry has experienced tremendous growth over the past decade and that growth has continued even after the pandemic. Looking ahead to 2023, there are positive signs for continued growth, with the potential for another record-breaking year once 2023's holiday shopping season is accounted for.

## Asian Markets and Ecommerce Businesses Are Thriving

The ecommerce industry's traffic share shifted significantly between 2022 and 2023, with the U.S. experiencing a 19% decrease and India seeing a substantial increase to become the second-highest country for web traffic. The global big winners were amazon.com, ebay.com, and walmart.com, though Asian players flipkart.com and lazada.com.ph saw the most year over year growth.

## A Mobile Strategy Is Still Key in 2023

The rise of mobile usage in ecommerce in 2023 emphasizes the importance of examining mobile data and shopping apps. Compared to other app categories, shopping apps have slightly higher CPA and CPT rates, but also a higher conversion rate and lower tap-through rate. The top 10 ecommerce mobile apps globally in 2022 included familiar names like Amazon, but also unexpected ones like Meshoo, Shopee, and Shein, which are all based in China and serve Asian markets.



## **Direct Traffic Is King in Ecommerce, But Don't Forget Search and Referral**

While direct traffic remains king in the ecommerce industry, accounting for 53% of traffic globally, search and referral have battled for the number two spot over the past few years. While both channels remain key for any ecommerce marketing strategy, search has emerged at the start of 2023 as the second highest driver of traffic to ecommerce brands.

## **TikTok May Be the Future of Ecommerce on Social**

TikTok is becoming a powerful resource for those in the ecommerce industry due to its growing user base, the presence of hard-hitting influencers, and its emerging ecommerce tools. With a significant proportion of its users having made purchases on the platform, TikTok's built-in features, such as storefronts and hashtag options, enable businesses and creators to effectively reach high-value audiences. As a result, companies who ignore TikTok as a platform to promote their products risk missing out on potential sales, especially from younger generations of customers.

## **Artificial Intelligence and Augmented Reality Are Essential**

Rapid advancement in the world of Artificial Intelligence (AI) and Augmented Reality (AR) is significantly impacting the ecommerce industry. Businesses are using AI to provide personalized customer experiences, automate customer service, enhance ad targeting and improve operations. Likewise, AR is creating new avenues for marketing ecommerce products, especially in the context of social media. Ecommerce businesses that fail to take advantage of emerging AI and AR technology run the risk of falling behind in the competitive ecommerce landscape as consumers demand more responsiveness, convenience, and personalizations from the brands they engage with.

## **Amazon: A Major Threat or a Massive Opportunity?**

Amazon.com remains the leader in the industry, and has a recipe for success as seen in their impressive 13% conversion rate, compared to the industry average of 2-3%. Looking toward the future, amazon.com will likely remain the leader, but smaller ecommerce brands can still get in on the action, especially those interested in products that succeed on amazon.com, including clothing, office accessories, and electronics.

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## Keyword Wizard for Amazon

The Keyword Wizard for Amazon helps you handle one of the key challenges in making your product visible in Amazon results—finding the right search terms.

[Grow with Keyword Wizard for Amazon ↗](#)



# Thank you!

If you have any thoughts or comments about this report or want to learn more about the capabilities of Semrush .Trend, feel free to reach out to us at

[mail@semrush.com](mailto:mail@semrush.com)