

A hand holding a red pen points to a bar chart on a document. The chart has several teal bars of varying heights. The background is a blurred office setting with a laptop and other documents. There are decorative blue and yellow curved shapes in the corners.

**WHITEPAPER**

# Optimizing Digital Strategies During the COVID Crisis

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Updated April 28, 2020

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# Methodology

The insights in this report are based on SimilarWeb data.

The analysis covers US traffic and media strategies for retail sites during the period from January 1 to April 19, 2020. The data includes traffic from desktop and mobile web, and provides a year-over-year comparison.



## Introduction

The recent coronavirus outbreak has left businesses seeking answers, bracing for the worst, and experimenting with new ways to improve performance in an uncharted world.

Although significant changes in this category weren't apparent until mid-March, retail sites have seen massive traffic shifts throughout the past 28 days.

During this difficult time, marketers across brands and agencies must constantly seek innovative ways to optimize performance, adapt to change, and refocus their efforts.

Although the US has been slow to respond to the impending health threat, it is not the only country whose businesses have been impacted. These dramatic traffic shifts are being experienced worldwide.

This whitepaper will focus on all the recent shifts in the US retail marketing space and, regardless of industry, will provide guidance as to how marketers can adjust their strategies through partnering with strong affiliates and identifying the right keyword strategy for them.



# Key Takeaways

- Across the retail category, YoY traffic increases were noted from approximately the fourth week of March.
- The **hobbies and leisure** category saw the greatest relative increase in the last measured week of April, at over 55% YoY growth.
- Despite an initial drop, PPC traffic to retail sites has returned to pre-Coronavirus levels.
- Amazon decreased its paid search traffic by 85% in late March.
- Organic search traffic grew for *how-to* related keywords, like *how-to make bread*, but are not yet being targeted by PPC campaigns.
- Many large companies are relying more heavily on paid and affiliate traffic than previously.

# Important Dates

- Dec 31**  
First Coronavirus case in Wuhan, China
- Jan 19-25**  
First "imported" cases reported in the EU/US
- Feb 23-29**  
First "community" cases reported in the EU/US
- Feb 29**  
State of Emergency announced in multiple US states
- Mar 11**  
US restricts European travel
- Mar 15**  
Businesses across the US close



# Retail Trends and Strategies



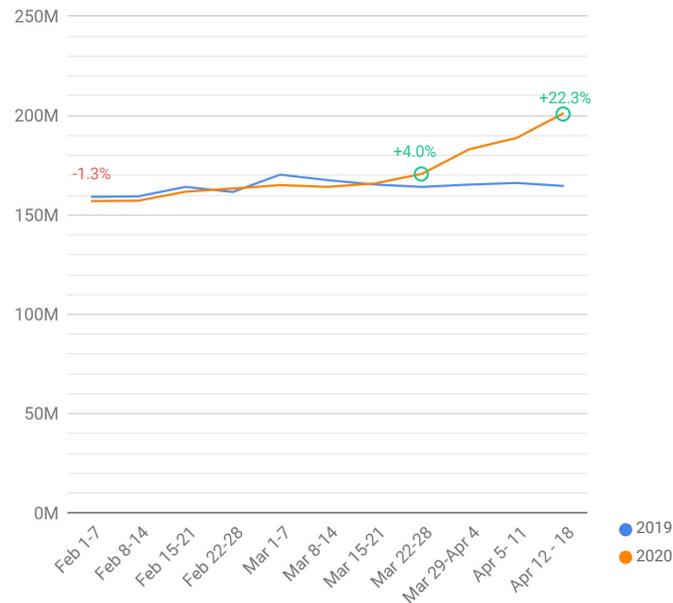
# Retail Traffic Trends

To analyze retail trends we reviewed desktop and mobile traffic to the top 100 shopping sites from February to April 18th, using a YoY comparison.

While retail traffic did not initially change significantly, traffic increases were noted from approximately the fourth week of March, when traffic was 4% greater than the same week in 2019. By the week ending in April 18th of this year, that increase had widened dramatically, reaching 22.3%.

## Daily Traffic to Shopping Sites

US, Desktop & Mobile Web, Feb 1 - Mar 19 2019 vs 2020



**Retail traffic remained unchanged throughout most of March, and only saw considerable increases in early April.**

## Category Specific Performance

Note that not all categories have experienced the same trends. Diving into category-specific traffic shifts we see a wide- variety of changes.

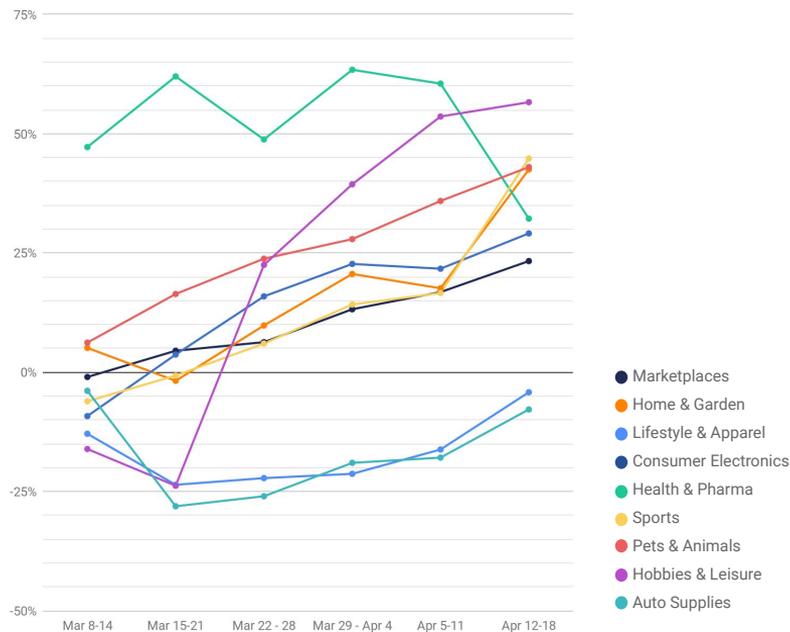
The **lifestyle and apparel** category, as well as auto supply sites, have experienced traffic decreases throughout the measured period. Opposingly, **home and garden**, consumer electronics, pets, and marketplaces saw a steady increase in traffic, as the weeks since COVID-19 wore on.

However, several categories have a more complicated story. Throughout most of March, **health and pharma** saw traffic increase approximately 50% higher than last year, but traffic increases began declining in mid-April, suggesting perhaps available supplies began to drop.

Similarly, **hobbies and leisure**, one of the categories that saw the most impressive growth, initially saw traffic declines before it reached the greatest relative increase in the last measured week of April, at over 55% YoY growth.

## Daily Traffic Changes by Category

US, Desktop & Mobile Web, Mar 8-Apr 18 2020 vs 2019



With time to spend at home, American consumers increased traffic to shopping sites to improve their stay, including Hobbies (+57%), Pets (+43%), Sports (+45%), and Consumer Electronics (+29%).

## Changes in Strategy

With all of the major traffic shifts, naturally marketing strategies changed as well. So, we looked at the most prominent traffic sources to see how user acquisition has been affected. Our core finding was that **all traffic sources saw some level of increase.**

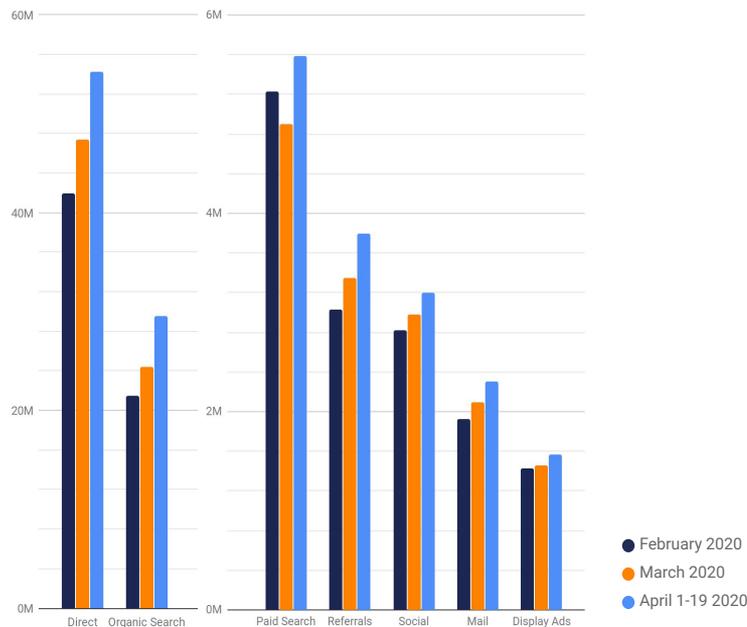
While paid search saw a momentary decrease in volume during March (-6.2%), shifts in paid search strategies led to a subsequent increase of 14% throughout April.

Direct traffic, organic search, and referrals also saw dramatic gains, increasing upwards of 25% each when compared to February.

On the other hand, brands appear to rely less on email and display ads campaigns during the COVID era thus far.

## Average Daily Volume by Traffic Source

US, Desktop Data, Feb 1 - Apr 19, 2020



**Traffic increases are substantial across acquisition channels. In paid search, an initial decrease in March was followed by significant gains in April.**



# Paid Search Changes and Opportunities



# Paid Search Strategies in Retail

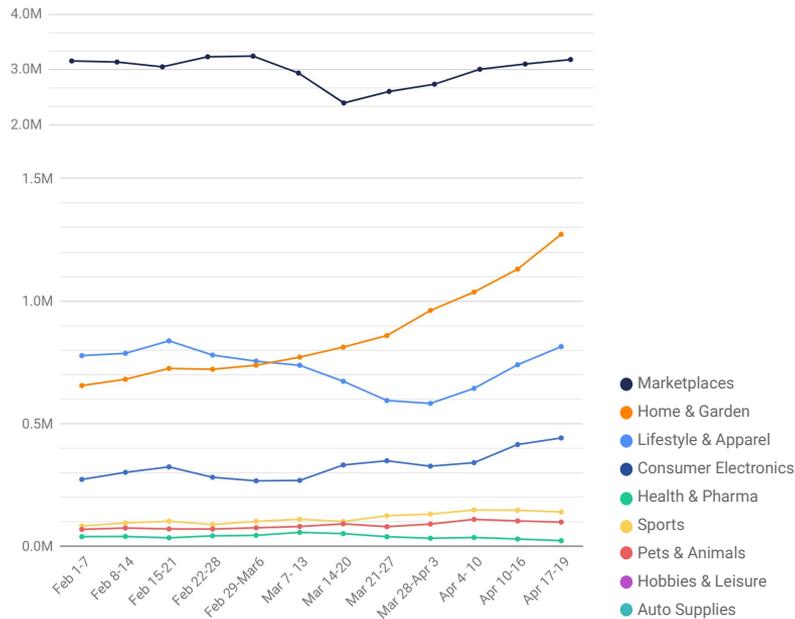
One of the marketing channels most impacted by the COVID-19 outbreak has been paid traffic. The popular user acquisition channel saw dramatic traffic decreases in March following a 6% drop in February traffic.

When looking at category traffic on a weekly basis, we can see that this dip is primarily related to drop in PPC spending during mid-March by marketplaces, and to a lesser extent, **lifestyle and apparel**.

However, that dip in paid search traffic was short-lived and saw growth in the following weeks, as marketplace paid search spend returned to pre-Coronavirus levels. At the same time, home and garden retailers continually increase paid search spend, while lifestyle and apparel sites are also beginning to bounce back.

## Paid Search Traffic by Category

US, Desktop & Mobile Web, Mar 14-18, 2019 vs 2020



**While marketplaces abruptly decreased PPC spend in mid-March, that traffic has slowly regenerated. Meanwhile, other sectors, like Home & Garden, increased spend throughout.**

# Marketplaces Paid Search Overview

The dramatic drop in paid search traffic to marketplace sites can primarily be attributed to Amazon's strategy shift. The giant abruptly stopped its paid spend - dropping from 1.1M daily visits at the start of February to 150K in the third week of March.

Amazon's sudden strategy change happened almost overnight, dropping by 84% over two days. On March 10, the giant won about 1M PPC visits, and by March 12, that number dropped to 157K. Initially shocked by this change, walmart.com reacted similarly, dropping paid search, as did ebay.com for one day.

As marketplaces realized they had an opportunity to bid on keywords at a lower price point, retailers began increasing their paid search spend over the next few weeks, which is reflected in rates of paid traffic.

## Paid Search Traffic into amazon.com

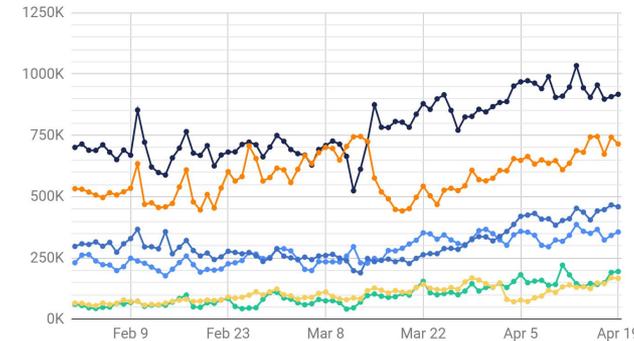
US, Desktop & Mobile Web, Feb 1- Mar 18 2020



Amazon abruptly halted its paid search spend on March 10-12, dropping 84% in two days.

## Paid Search Traffic - Other Marketplaces

US, Desktop & Mobile Web, Feb 1- Mar 18 2020



Walmart.com and ebay.com initially followed amazon.com's footsteps, but quickly increased their paid search spend.

## Big Moves in Paid Search

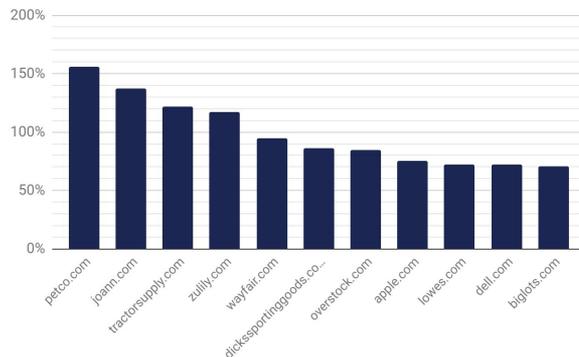
Contrasting Amazon's dramatic drop in paid search channels, several retailers increased paid search over the last month. Several of the biggest increases were petco.com and joann.com, raising paid search traffic by 157%, and 140% respectively, while apple.com and dell.com increased by 70%.

As PPC spend changed, so did paid keyword trends. For example, video game-related keywords, usually reserved for Amazon (like *ring fit adventure*) saw their share of shopping site traffic decrease from 0.1% to less than 0.03%.

On the other hand, keywords related to at-home activities (*webcam*, *pull up bar*, *dumbbells*, etc.) grew. Similarly, *Nintendo Switch*, a popular gaming console widely sold by marketplaces increased rates of paid traffic search as demand for it rose among quarantined consumers. This highlights that Amazon, who usually wins most gaming traffic, is not bidding on PPC keywords, leaving room for marketplaces to win more of this traffic.

## Paid Search - Dramatic Increases

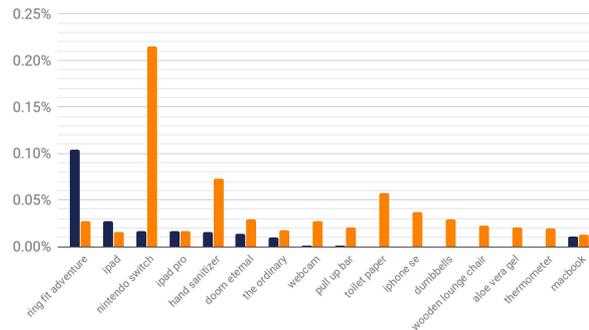
US, Desktop & Mobile Web, Feb 1-29 vs Apr 1-19



64 of the 100 sites measured increased their paid search traffic in April, compared to February.

## Changes in Paid Keywords Share

US, Desktop Data, Feb 1-29 vs Mar 23 - Apr 19



As paid search increased across retailers, the keywords getting paid traffic shifted dramatically.

● Feb 1-29  
● Mar 23 - Apr 19

# “Nintendo Switch” Keyword Study

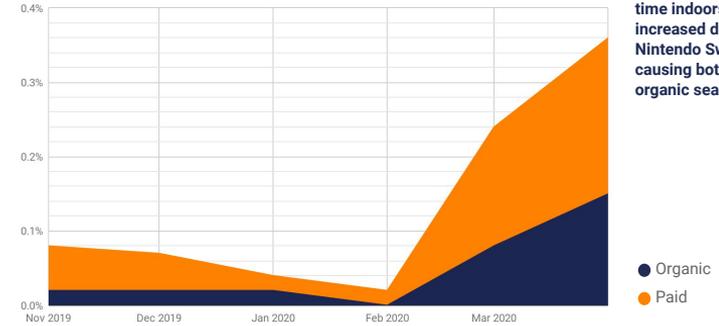
As we noted previously, *Nintendo Switch* is one keyword that increased its paid traffic share to shopping sites since the COVID-19 outbreak. This popular Christmas gift generally wins the bulk of its traffic throughout the start of the holiday season (November-December); however, as quarantined consumers sought to keep busy, traffic to Nintendo Switch rose, and the product has been [flying off shelves](#).

Traffic-related to Nintendo Switch increased on both paid and organic searches. In fact, over the last 28 days, it has had a higher share of paid search traffic than it did throughout the last six months, including during the shopping holiday period.

By breaking down keyword traffic, we identified the top sites receiving traffic from this keyword. New players are actively bidding on this keyword like prodstop.com, gizmonest.com, and even ebay.com.

## “Nintendo Switch” Share of Search

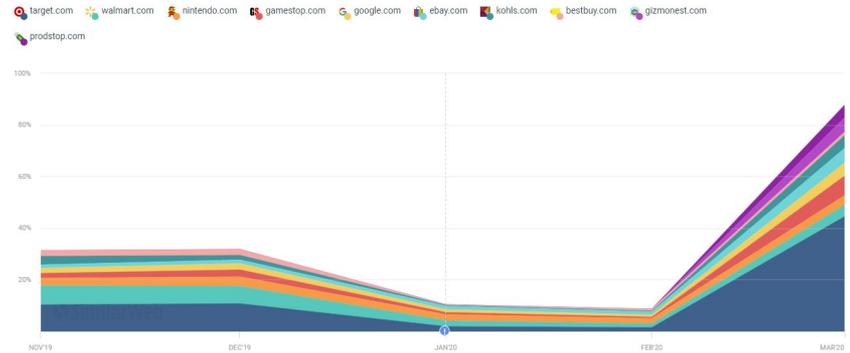
US, Desktop Search Traffic to Shopping Sites, Nov 2019 - Apr 2020



Consumers spending time indoors led to increased demand for Nintendo Switch, causing both paid and organic search to soar.

## “Nintendo Switch” Paid Traffic Breakdown

US, Desktop Search, Nov 2019 - Mar 2020



# Identifying Search Opportunities

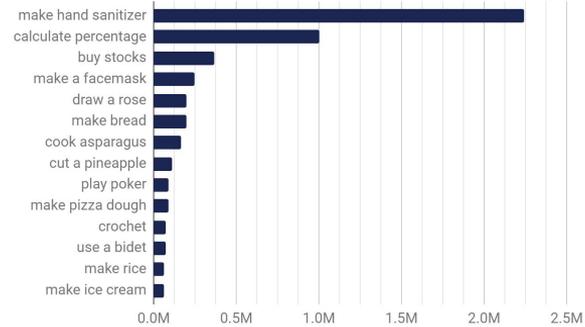
According to Google Trends, a major recent keyword trend is *how-to* keywords. We looked at some of the most popular *how-to* keywords over the last 28 days to find potential targeting opportunities.

One set of such keywords was food and cooking related. For example, *how to make bread*, *how to cook asparagus*, *how to make ice cream*, and more. This group of keywords saw volume increase from 370K searches in January, compared to 836K in March. Moreover, 100% of the traffic from this set of keywords is organic and is mainly won by 3 sites: **tasteofhome.com**, **allrecipes.com**, and **delish.com**.

Interestingly, not a single retail site appears to be competing for this traffic. Therefore, optimizing content for these types of queries or bidding on relevant keywords is one strategy that relevant sites can implement to gain traffic at a time when audience interests are shifting away from the ordinary.

## Top “How To” Keyword Search Volume

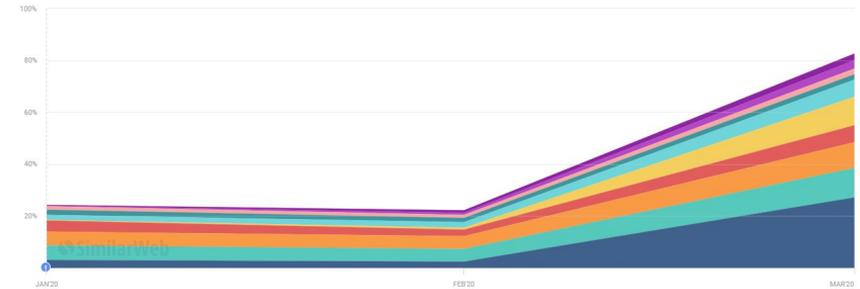
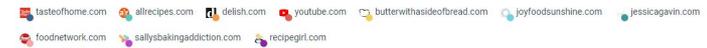
US, Desktop Search, Mar 2020



How to keywords are trending, specifically those related to COVID preparedness, home schooling, and food preparation.

## Organic Search Breakdown: How to Cook Keywords

US, Desktop Search, Jan-Feb 2020





# Tracking Shifts in Affiliate Marketing



# The Retail Affiliate Space

Juxtaposing PPC trends, strategy shifts in response to the Coronavirus outbreak have appeared to increase volumes of referral traffic across all categories except one.

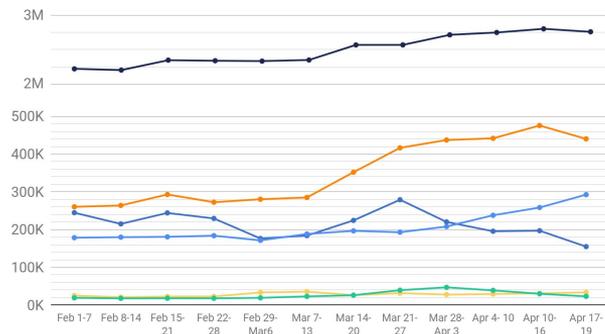
**Lifestyle/Apparel** sites are the only ones to experience a decrease in referral traffic.

Online marketplaces have seen the most notable uptick in traffic. Coming off a whopping 2.2M visits, this category has seen a 17% increase in referrals traffic, comparing February to March and April. Other categories with dramatic growth include consumer electronics (+55%) and health & pharma (+77%).

Amazon, generally the biggest winner of referral traffic, experienced an increase of 16%. However, that increase is minuscule as Walmart, Target, and Best Buy increased by 79%, 214%, and 117% respectively.

## Weekly Referral Traffic by Category

US, Desktop & Mobile Web, Feb 1- Apr 19 2020

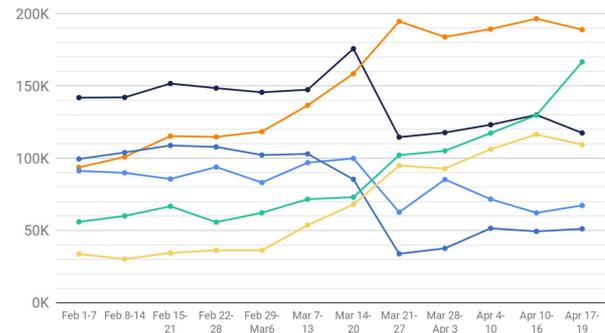


Since mid-March, referrals traffic into Marketplaces increased 17%, while Consumer Electronics referrals increased 55%.

- Marketplaces
- Consumer Electronics
- Home & Garden
- Lifestyle & Apparel
- Health & Pharma
- Sports

## Traffic to Top Referral Traffic Recipients

US, Desktop & Mobile Web, Feb 1- Apr 19 2020 (amazon.com excluded)



While walmart.com, target.com, and bestbuy.com increase referrals traffic, other retailers are reducing focus.

- apple.com
- walmart.com
- homedepot.com
- ebay.com
- bestbuy.com
- target.com

# Identifying New Affiliates in the Wake of Amazon Changes

In addition to Amazon's decreased reliance on paid search, it has also now cut affiliate rates dramatically.

We expected this announcement to result in a drop of incoming referral traffic to amazon.com; however, it increased 5.8% over the last 5 days (since the new offering), compared to the same timeframe last week.

While much of the incoming traffic is from its owned properties (imdb, twitch, etc.), several external partners increased their shares of traffic, including referral network rstyle.me, magazines like goodhousekeeping.com and nymag.com, as well as deal sites like bensbargains.com.

Opposingly, slickdeals.net, buzzfeed.com, and others, decreased their share of traffic. Given Amazon's new offering, finding new partners who have shifted focus away from Amazon is key for any retail brand.

## Affiliate Traffic into Amazon.com

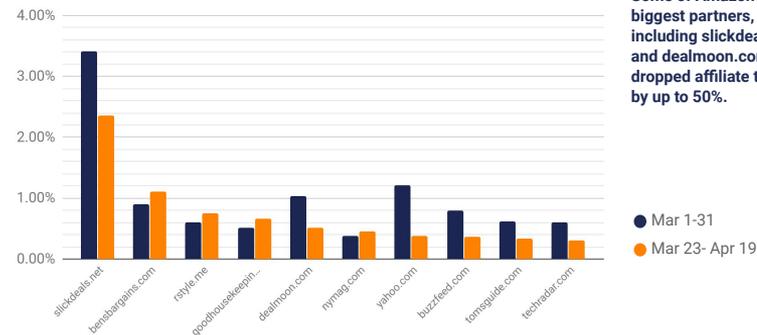
US, Desktop Data, Feb 1- Apr 19 2020



Despite announcing it would slash affiliate rates, referral traffic to amazon.com has increased 5.8% in the last week.

## Amazon.com Top Referrals Traffic Share

US, Desktop Data, Mar 1-31 vs Mar 23-Apr 19



Some of Amazon's biggest partners, including slickdeals.net and dealmoon.com, dropped affiliate traffic by up to 50%.

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[ADD CATEGORY](#)

#### Keyword Groups

Worldwide

Keyword Group

- PAIN-2ndOr
- FMT-2ndOr
- BABY-2ndOr

#### Trending Websites

United States • All categories

Website	Visits	Change
hbonow.com	28.45M	↑ 151.1%
nbryb.com	21.60M	↑ 93.29%
hbogo.com	23.26M	↑ 74.21%
kerumal.com	39.36M	↑ 70.65%
mlb.com	75.81M	↑ 49.66%

#### Trending Apps

United States • Google • All

Apps	Downloads	Change
Pinatamasters ▶	728,942	↑ > 5,000%
Idle Painter ▶	484,271	↑ > 5,000%
Dot n Beat - Test yo... ▶	267,413	↑ > 5,000%
AFK Arena ▶	839,209	↑ > 5,000%
Kick the Buddy: For... ▶	751,720	↑ > 5,000%

#### Trending Keywords

United States • All

Keyword
julian assan
coachella
nfl draft
damian lillar
tiger woods