

U.S. Edition

February 25, 2021

OVERVIEW

Digital Heat is an easy-to-use [heatmap](#) to help you quickly identify at scale which industries and companies are most impacted by the current economic environment. The report tracks in near real-time year-over-year (YoY) weekly website traffic trends.

On a macro level, it highlights directional trends – industries that are poised to benefit, and those that remain vulnerable. On a micro level, this monitor can help isolate differences within an industry.

This report helps analysts, traders, portfolio managers, and chief investment officers with idea generation and risk management.

KEY CHANGES THIS WEEK

Sectors with strengthening growth

- Consumer Goods

Consumer Goods | Drug & Pharmacy

riteaid.com is seeing exceptional growth (>500%) and expanding its share of online market (SoM) (+3.19 ppt)

Sectors with weakening growth

- Online retail
- Specialized Consumer Services

Consumer Goods | Grocery & Grocery Delivery

As it prepares for its IPO, **instacart.com** has been enjoying >100% YoY traffic growth since October and a growing share of online market (SoM).

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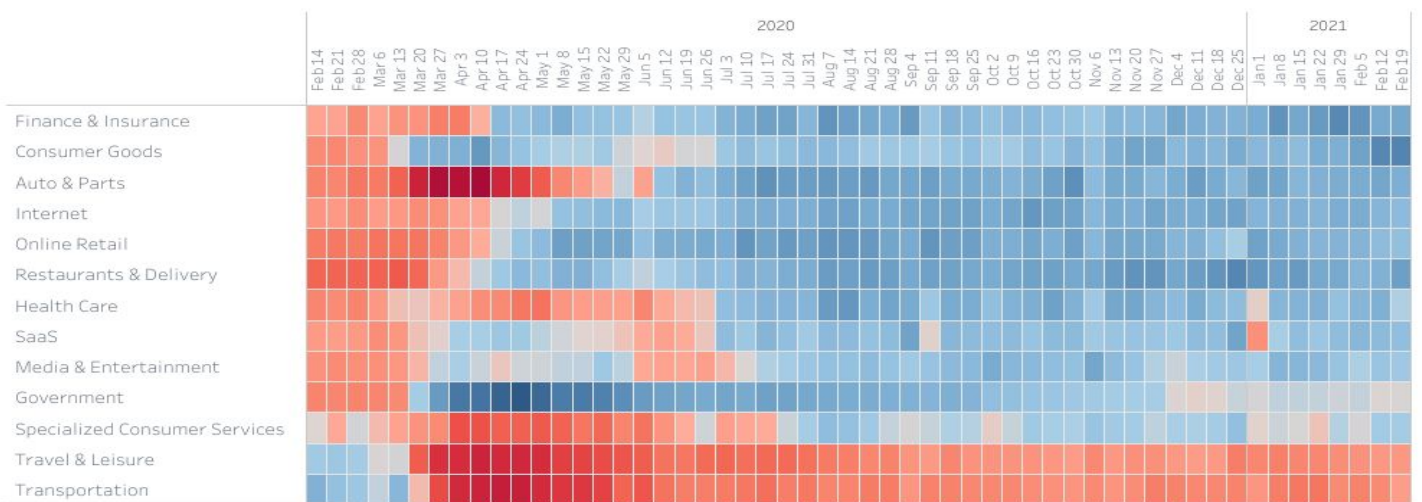
MACRO VIEW

What's Changed?

- YoY growth in traffic to **Consumer Goods** sites remains above average, and continues to get stronger.
- **Online Retail** sites are seeing weakening YoY traffic growth, although still above average.
- YoY traffic growth to **Specialized Consumer Services** sites remains weak compared to other sectors, but is seeing signs of improvement

SimilarWeb Sector Heatmap

Weekly Website Visits YoY Heatmap



A blue box represents above average growth in visits to sites (or a group of sites),
A red box represents above average decline.

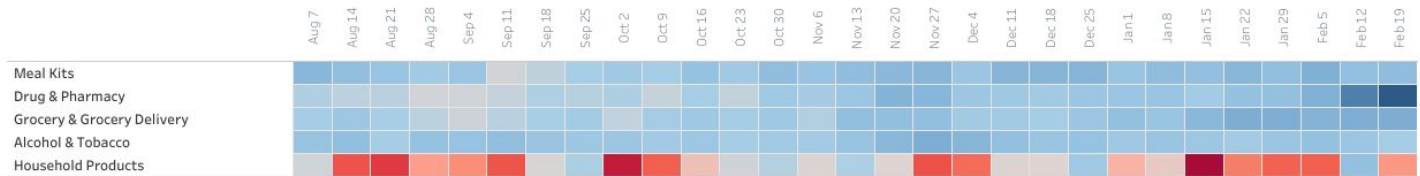
MICRO VIEW

What's Driving the Change?

Consumer Goods

Weekly Website Visits YoY Heatmap

This sector is one of the strongest in terms of YoY traffic growth. The primary driver: powerful growth from drug & pharmacy sites in the last two weeks. Grocery & grocery sites have also experienced increased site visits.



Consumer Goods | Drug & Pharmacy

Weekly Website Visits YoY Heatmap & Market Share Treemap

Average traffic growth for this industry was >200% YoY in the week ending Feb. 19, likely due to the availability of the COVID-19 vaccine and online booking facilities at most of the pharmacies we track. The most impressive growth was seen by riteaid.com, that reached >500% YoY in the week ending Feb. 19. Rite aid has also grown its SoM by 3.19 percentage points (ppt) to 7.5%. Despite the strong growth, riteaid.com's SoM is still dwarfed by walgreen.com (46.5%) and cvs.com (44.5%).

	2020												2021						
	Oct 16	Oct 23	Oct 30	Nov 6	Nov 13	Nov 20	Nov 27	Dec 4	Dec 11	Dec 18	Dec 25	Jan 1	Jan 8	Jan 15	Jan 22	Jan 29	Feb 5	Feb 12	Feb 19
riteaid.com	40%	27%	43%	60%	60%	94%	80%	37%	20%	37%	43%	57%	23%	33%	34%	19%	142%	289%	503%
walgreens.com	26%	20%	29%	34%	48%	57%	60%	56%	52%	48%	43%	54%	52%	50%	56%	68%	93%	153%	156%
cvs.com	81%	69%	79%	81%	84%	109%	82%	64%	82%	78%	86%	78%	82%	73%	78%	73%	78%	138%	138%
caremark.com	20%	18%	34%	9%	7%	27%	43%	23%	15%	9%	20%	11%	26%	9%	30%	29%	4%	-6%	40%
Industry Average	42%	33%	46%	46%	50%	72%	66%	45%	42%	43%	48%	50%	46%	41%	50%	47%	79%	144%	210%



Consumer Goods | Grocery & Grocery Delivery

Weekly Website Visits YoY Heatmap & Market Share Treemap

This industry’s growth is driven by publix.com, wegmans.com, and instacart.com, which have all enjoyed >100% YoY growth in website visits for the past few weeks. Publix.com has been seeing this positive trend since the beginning of January when the supermarket started offering the COVID-19 vaccine – available via online appointment.

The name that really stands out in this industry is instacart.com, that has been enjoying exceptional (>100%) YoY traffic growth since October. Instacart also increased its SoM by 2.19 ppt to 6.7%. Instacart is one of the most exciting IPOs expected to hit the markets this year. [Read more about it here.](#)

While the industry as a whole is doing well, we also note peapod.com, the only player to see YoY traffic growth turn red. Peapod is joined at the bottom of the pack with the great walmart.com, that is seeing below average growth (41%) compared to the rest of the sector (75%). While walmart.com continues to hold the most significant SoM by far, this is deteriorating.

	Oct.16	Oct.23	Oct.30	Nov.6	Nov.13	2020		Dec.4	Dec.11	Dec.18	Dec.25	Jan.1	Jan.8	Jan.15	2021		Feb.5	Feb.12	Feb.19
publix.com	35%	33%	29%	21%	50%	37%	51%	40%	42%	42%	41%	53%	68%	120%	225%	197%	163%	180%	152%
wegmans.com	30%	26%	23%	18%	28%	51%	34%	41%	28%	25%	47%	45%	27%	49%	36%	89%	128%	144%	149%
instacart.com	186%	139%	150%	140%	144%	160%	156%	154%	139%	151%	167%	132%	141%	125%	138%	94%	110%	109%	132%
albertsons.com	45%	65%	104%	48%	66%	69%	122%	66%	80%	56%	66%	75%	75%	102%	113%	120%	74%	105%	96%
safeway.com	26%	36%	47%	27%	54%	51%	59%	41%	48%	39%	50%	59%	44%	52%	60%	63%	48%	61%	58%
kroger.com	42%	25%	21%	25%	37%	41%	47%	23%	24%	30%	37%	38%	30%	48%	58%	46%	46%	34%	52%
walmart.com	58%	47%	42%	50%	93%	73%	30%	37%	33%	34%	31%	57%	55%	54%	52%	45%	44%	41%	41%
peapod.com	-62%	-61%	-65%	-70%	-72%	-60%	-73%	-75%	-73%	-77%	-76%	-73%	-72%	-76%	-74%	-78%	-79%	-77%	-79%
Industry Average	45%	39%	44%	32%	50%	53%	53%	41%	40%	37%	45%	48%	46%	59%	76%	72%	67%	75%	75%



This report contains a select subset of our digital market offerings.

We can also provide localized sector and industry data for the following countries: **U.K., Australia, Brazil, Canada, France, Germany, India, Indonesia, Israel, Japan, Malaysia, New Zealand, and Singapore**

Want to access more industry and company data? [Book a demo now](#)

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Appendix - How To Read The Maps

Digital Heat comprises of three distinct maps:

Cross-Sector & Cross-Industry Heatmaps

These *heatmaps* display normalized indices based on statistical factor modeling. These indices summarize the relative performance of either a sector or an industry over time. Blue cells represent an above average growth rate and red cells represent a below average decline.

Industry Analysis Heatmap

These *heatmaps* represent the YoY growth rates of websites within an industry over time. Blue cells represent a high YoY growth rate, and red cells represent a YoY reduction.

Industry Share Treemap

These *treemaps* represent the market share of web traffic visits within an industry. The size of the cell represents the relative visits market share (*SoM*). The color of each cell represents the YoY shift in market share (*YoY ppt*) - blue cells depict an increase in share over the course of a year, and red cells depict a loss in share.

