

2024 Marketing Benchmark Report

Optimizing Your Multi-Channel Strategy Through Industry Data and Benchmarks



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Welcome to *the* marketing benchmark report for 2024.

Budget cuts and a turbulent economy were met with the acceleration of AI and a more-savvy-than-ever audience in 2023. Add to the pot Google algorithm updates, regulation changes, and the growth of TikTok as a search engine; marketers have certainly been kept on their toes.

With constant change, data is now a marketer's North Star. Keeping track of your own, your competitors' and your industry's performance is crucial for climbing to the top.

But benchmarking is a complex and often forgotten task in marketing. So Similarweb and HypeAuditor are proud to deliver a series of benchmarks across seven core industries in the US for marketers to contextualize their performance, set goals and find opportunities in 2024.

And what does the report tell us overall for marketers?

- **Desktop traffic** is down an average of **1.9%** year-on-year (YoY) for all industries
- **Paid marketing** saw a YoY increase, contributing to an average of **11.3%** of total traffic
- **Influencer marketing** is on the rise, with brand mentions growing **7%** YoY
- **Engagement rate** for influencer marketing has decreased slightly, down **0.5%** YoY, yet influencers outperform brands here significantly

Our benchmarks looked at the top 1,000 websites per industry, sorted by traffic size. This way businesses can benchmark themselves against these averages. Of the seven industries we analyzed, these are the overall monthly traffic benchmarks:

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Hotels & Accommodation	17.1m	669.1k	48.6k
Beauty & Cosmetics	3.3m	340.2k	60.5k
Consumer Electronics	17.1m	900.8k	51.6k
Home and Garden	12.5m	924.1k	133k
Jewelry & Luxury	785.1k	174.9k	22.2k
Pet Food & Supplies	3.4m	360k	41.6k
Fashion & Apparel	11.9m	2.3m	305.5k

We encourage you to bookmark this report, share with your marketing team and wider business. See the breakdown of traffic by channel and engagement to see where you're performing, where you have gaps, and where you can grow.

The **biggest mistake** in marketing is to operate in a vacuum.

Benchmarking **contextualizes** your marketing performance and through it you'll find areas to improve, optimize and, **grow**.

Benchmarking for marketers in 2024 (US)

In this benchmarking report, we give you metrics on:

- Digital marketing website performance based on Similarweb data
- Influencer marketing performance, specifically on Instagram, based on data from HypeAuditor

We have reviewed US data from 2023 (Jan – Oct) of the top 1,000 websites within an industry (also referred to as a ‘category’)

How we’ve benchmarked:

Rather than give an overall industry average, **our benchmarks are split into three cohorts based on the volume of traffic that brand receives** to its website, AKA: ordered by the biggest digital players:

- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 – 1,000 within the industry

So when reviewing the benchmarks in our report, you can check your own monthly traffic to see which cohort you fall into – and which side of the benchmark you are on, eg. **where you shine and where you can improve.**

Benchmark metrics in this report:

- Website traffic: overall and by specific marketing channel (incl. direct, organic, paid, referral)
- Website engagement metrics: bounce rate, pages per visit, time spent on site
- Instagram followers
- Influencer marketing reach:

It’s important to know the marketing landscape, so we’ve provided:

- Marketing consolidation: traffic driven by the top 1% of players
- Audience demographics: how it differs from web to social, and how it’s changing YoY
- Audience loyalty: how many sites within the industry your audience visits
- Overall reach of influencers



Accommodation and Hotels

Accommodation and Hotels

Average monthly traffic

558.7M

Demand Traffic

+6.4% YoY

Top players

Top websites by average monthly visits:

1. Expedia.com: **83.8m**
2. Airbnb.com: **76.3m**
3. Booking.com: **61.8m**
4. Marriott.com: **41m**
5. Hilton.com **31.3m**

Top for influencer estimated reach:

1. Airbnb: **41.6m**
2. Booking.com: **39m**
3. Delta Air Lines: **22m**
4. Disneyland: **18.5m**
5. Virgin Voyages: **7.3m**

Top channels

For web traffic:

1. Direct: **53%**
2. Organic: **23%**
3. Paid search: **12%**

No. of influencers

55.5k Travel Influencers, with total reach of **691m**

Market domination

75% of traffic taken by **top 1%** of players

Category difficulty

High

If there was one thing the world needed in 2023, it was holidays. And that need isn't looking to slow down for 2024.

- This category experienced higher growth demand at 6.4% in the US compared to worldwide at 5.6% YoY.
- Demand is fairly steady throughout the year, but peaks in summer holiday season, with mobile traffic leading the way.
- In a category dominated by big brands like Expedia, Booking.com and Airbnb, direct traffic dominates, bringing in over 53% of the overall traffic, up from 49% in 2022.
- With influencer marketing's estimate reach figures in the millions, this is a channel brands shouldn't ignore. The 'big three' lead the pack in both web traffic and influencer marketing – setting an example for smaller, Challenger brands to follow.
- This is a harder category for smaller businesses, with three quarters of the overall traffic taken by the top 10 players.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	17.1m	669.1k	48.6k
Direct	9.2m	316.5k	18.8k
Organic	3.9m	149.6k	12.7k
Paid	2.1m	76.4k	4.5k
Referral	836.4k	86.8k	7k
Email	412.8k	17.8k	2.5k
Display	386.4k	15.4k	2.2k
Social	203.7k	6.7k	831

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

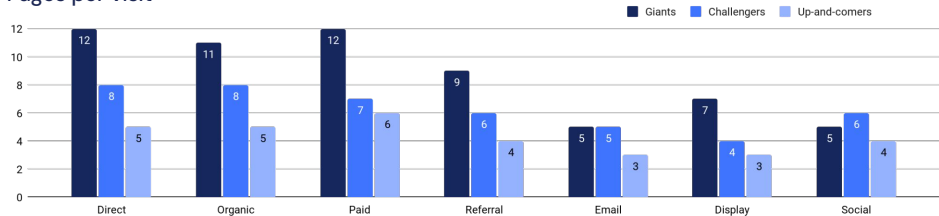
- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

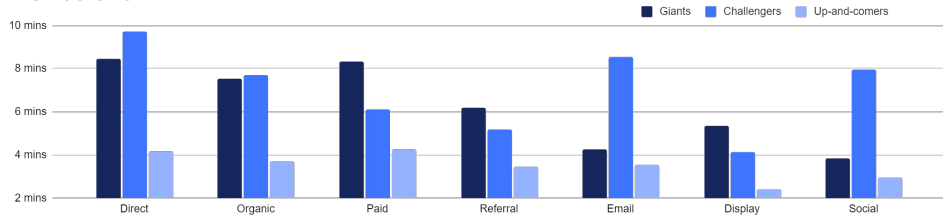
- All Traffic monthly benchmark for the Giants (positions 1-10) is at 17m+. This top 1% of sites holds 75% of the category's traffic.
- All traffic for the Challengers (positions 11-100) is 669k and Up-and-comers (positions 101 -1,000) should be aiming for around the 50k mark to be on the right side of the benchmark.
- Direct, organic, and paid channels are leading the pack. Except for the challengers who get more referral traffic than paid.
- Referral traffic for the industry overall is down YoY by three percentage points. In 2023, Google demoted affiliate-revenue driven blogs, which will have cut referral traffic. UGC focused sites like TripAdvisor provide a lot of healthy referral traffic.
- Social drives the least traffic to websites, however, with the rise in social commerce, consumers are more likely to stay and buy through the social platform, which is why influencer marketing has grown so much in this category.
- Display isn't prioritized by the 'big three' with Hilton, IHG and Marriott leading this category.

Digital marketing benchmarks: Engagement

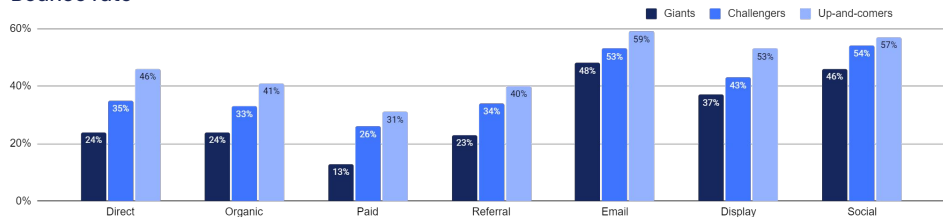
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

Engagement metrics are pretty high in this category, owing to consumer research, and a longer decision-making process:

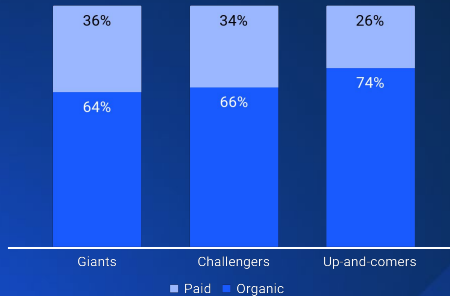
- Usability and navigation should be a primary focus for marketers in this category.
- The Giants lead the way in the number of pages visited and lowest bounce rate.
- Interestingly, the Challenger brands have a higher time on page than the giants for direct and organic.
- The bounce rate benchmark marketers need to pay attention to is for paid search. This is the lowest (ie. best) of every channel, and speaks to the need for carefully crafted and optimized landing pages for this high-intent audience.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic – equating to around 33 – 35%, which is consistent across all three cohorts (from giants to up-and-comers).

For marketing teams, it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

- **Giants:** 23% of total traffic is organic
- **Challengers:** 22% of total traffic is organic
- **Up-and-comers:** 26% of total traffic is organic

Overall organic traffic share for the category is 23%, which is **down from 26% in 2022**. Both paid and direct traffic have risen YoY, shrinking organic's share slightly.

A lot of organic traffic also goes to branded terms, in October 2023 direct and branded traffic together was 69%, suiting bigger brands.

Up-and-comers rely more heavily on organic search, so any sites in this category should be **focusing on the long-tail and really honing in on their niche**, rather than competing on the hyper competitive search terms, like 'flights' which has 4m monthly searches, yet a keyword difficulty of 98.

PAID

- **Giants:** 13% of total traffic is paid
- **Challengers:** 11% of total traffic is paid
- **Up-and-comers:** 9% of total traffic is paid

Average PPC spend per site in the industry is \$1.5m per month – pushed up by the larger focus by the Giants on paid search, and the need to bid on both branded and non branded terms.

Brands in this category should monitor and protect their branded terms, as the top 10 traffic-driving keywords to the category are all branded, which heightens the competitive playing field and pushes CPC up.

Challengers and Up-and-comers, should prioritize organic search over paid, but in a similar vein to organic strategy, should focus on the long-tail, niche and high intent keywords for PPC.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	73.1%	21.7%	5.0%	0.2%	0.1%
ER	0.9%	0.4%	0.3%	0.2%	0.2%
Comments	0	1	2	6	35
Likes	22	43	108	421	2.9k

- The following breakdown shows brands in different follower tiers and their respective performance. As you can see, engagement rates are higher among smaller brands and diminish as their size increases.
- If you're in this sector, you can use these insights to compare your metrics and determine how you weigh up against industry averages.
- Overall average engagement rate for brands is 0.8%

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	290	69	38
Average influencers	211	47	25
Average ER	1.8%	1%	0.8%
Average Reach	15.4m	3.7m	1.2m

- In this category, Giant brands collaborate with an average of 211 influencers per month, getting 290 mentions.
- The average engagement rate achieved by influencers at this level is substantially higher – 1.8%, more than double the 0.8% average that brands achieve on their own. This is a clear indicator as to why influencer marketing is such an important, and highly-used strategy in this industry.
- It should be noted, however, that engagement rates for influencers falls for smaller brand collaborations; this could be attributed to the relative recency of influencer marketing in service industries, as well as larger brands securing higher-quality influencers.
- Smaller brands should focus on a thorough influencer vetting process to ensure solid return on investment here.
- Reels dominate the posting strategy for influencers in this sector, at over 50% of all posts. Reels are known for generating higher engagement rates than other post types.

Distribution of influencer posts by type

50.7
reels

26.6
sidecar

22.7
image

Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

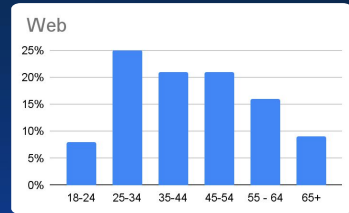
Web:



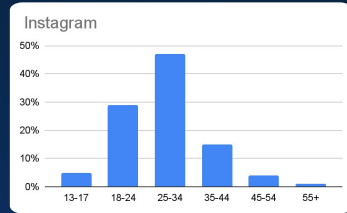
Instagram:



Age:



Age:

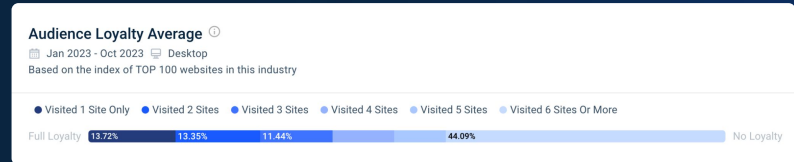


In terms of gender split, regardless of channel, the slight majority of the audience for this industry is female.

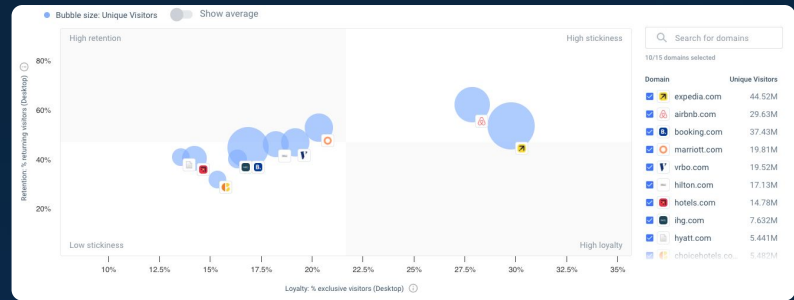
For social, the predominant groups are Gen Z and Millennials, with over 75% of the collective audience falling between 18 – 34. Web traffic on the other hand has far less of the younger Gen Z audience, and 45 – 64 year olds make up 37% of the total audience – not to be ignored.

LOYALTY

Similarweb's loyalty metric score for this category is low, at 15.5%. This is good news for challenger brands and up-and-comers, as consumers are more likely to visit multiple sites within the category: 44% visit six or more sites:



Airbnb and Expedia lead with 28% and 30% of their respective audience only visiting that one site. But generally, complete loyalty is hard, even for the Giants:





Beauty and Cosmetics

Beauty and Cosmetics

Average monthly traffic	311.7M												
Demand Traffic	+11.8% YoY												
Top players	<table><tr><td>Top websites by average monthly visits:</td><td>Top for influencer estimated reach:</td></tr><tr><td>1. Sephora.com: 39.4m</td><td>1. Sephora: 143m</td></tr><tr><td>2. Ulta.com: 33.9m</td><td>2. Loreal Paris: 96m</td></tr><tr><td>3. Bathandbodyworks.com: 29.9m</td><td>3. Maybelline New York: 59.2m</td></tr><tr><td>4. Byrdie.com: 12.8m</td><td>4. SHEGLAM OFFICIAL: 66m</td></tr><tr><td>5. Vagaro.com 10.6m</td><td>5. CHANEL: 54.1m</td></tr></table>	Top websites by average monthly visits:	Top for influencer estimated reach:	1. Sephora.com: 39.4m	1. Sephora: 143m	2. Ulta.com: 33.9m	2. Loreal Paris: 96m	3. Bathandbodyworks.com: 29.9m	3. Maybelline New York: 59.2m	4. Byrdie.com: 12.8m	4. SHEGLAM OFFICIAL: 66m	5. Vagaro.com 10.6m	5. CHANEL: 54.1m
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4. Byrdie.com: 12.8m	4. SHEGLAM OFFICIAL: 66m												
5. Vagaro.com 10.6m	5. CHANEL: 54.1m												
Top channels	For web traffic: 1. Direct: 50% 2. Organic: 24% 3. Paid search: 10%												
No. of influencers	75.6k beauty influencers, with total reach of 657m												
Market domination	45% of traffic taken by top 1% of players												
Category difficulty	Medium												

After a year of ups and downs, people naturally looked for ways to rejuvenate and boost well-being in 2023. As we approach 2024, it's important for businesses to benchmark their performance in the fiercely competitive Beauty and Cosmetics industry.

- 'Beauty and Cosmetics' category grew by 10.9% YoY worldwide, and 11.8% YoY in the US.
- In terms of traffic, **demand peaks over the holiday season between October and December**, with more mobile traffic by far.
- This category is dominated by household name brands like Sephora and Bath & Body Works so, naturally, direct traffic dominates, driving 50% of the overall traffic – up from 46% in 2022.
- Influencers play a big role, with their reach in the millions across the board. Emerging players shouldn't be underestimated – SHEGLAM stands out not only in reach (66m) but saw rapid growth on Instagram, gaining 184k new followers.
- Overall traffic leader, Sephora, is also in the top 5 across every marketing channel (aside from referral traffic) and takes the top spot for search, display and direct.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	3.3m	340.2k	60.5k
Direct	1.6m	171.6k	24.6k
Organic	945.5k	67.2k	17.9k
Paid	354.4k	36.8k	8k
Referral	118.9k	27.1k	2.6k
Email	50.6k	7.3k	1.7k
Display	135.6k	12.9k	2.7k
Social	75.5kk	17.1k	2.9k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

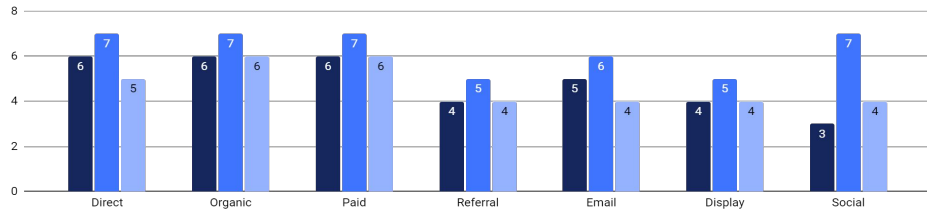
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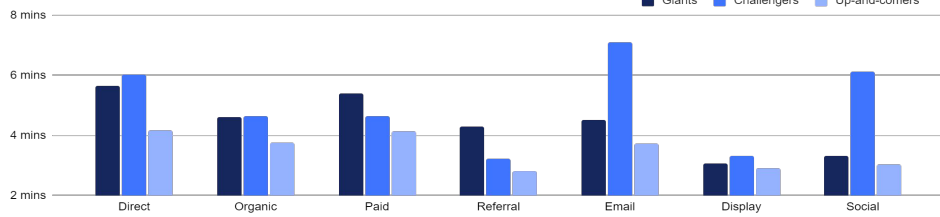
- The All Traffic monthly benchmark for the Giants is 3.3m, the top 1% of websites take 45% of total traffic.
- The benchmark of total traffic for Challengers is **340k**, and for Up-and-comers is **60k**.
- Although the Giants get the most direct traffic by far (1.6m), Challengers get the **highest percentage of direct traffic**, suggesting a loyal, engaged customer base. The key takeaway here is that investing in brand awareness strategies can really pay off for medium to smaller companies.
- The Up-and-comers' benchmark is higher for paid (13%) and organic traffic (30%) than both the Giants and Challengers. This shows that smaller businesses rely more heavily on search channels for traffic.
- The benchmark for display ad traffic is high compared with other industries, despite having fallen by 12% since 2022. This is still a channel with potential for this popular industry.

Digital marketing benchmarks: Engagement

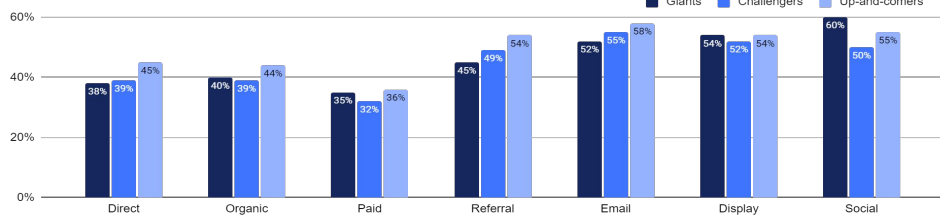
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

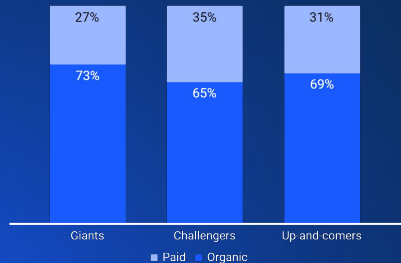
- Interestingly, the **Challengers have more pages per visit than Giants across most channels** – notably in direct, organic and paid search. This suggests Challengers have optimized UX or longer user journeys that keep people engaged for longer.
- The highest visit duration for the Challengers comes from email marketing, indicating appealing images and messaging were used, and that their email segmentation is done well.
- The channel where **bounce rate is lowest is paid search**, where ROI is crucial, showing that there's a high bar across all website groups.
- **All website groups are struggling to keep users on their site**, with bounce rate for this category being generally higher than expected compared to other industries.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic. The Giants' share of search is 39.8%, the 'challengers' at 30.5% and the Up-and-comers at 42.9%. This shows a disparity between the website groups, with the Challengers relying on these channels less than the others.

For marketing teams, it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 29% of total traffic is organic

Challengers: 20% of total traffic is organic

Up-and-comers: 29% of total traffic is organic

Direct traffic may dominate for all website groups in but organic traffic is a close second.

Of the top 100 organic keywords this year, **99% are branded terms**, showing the importance of brand recognition in the Beauty and Cosmetics industry. In fact, direct and branded organic traffic combined accounts for 65% of overall traffic for the category.

When you filter out branded keywords, 'near me' search terms prevail, suggesting that focusing on local SEO should be a priority in 2024. Also, **'how to' queries make up nearly 65% of all non-branded, organic searches** under the 'Question Queries' filter. Marketers can use these search queries to create more engaging content strategies.

PAID

Giants: 13% of total traffic is paid

Challengers: 11% of total traffic is paid

Up-and-comers: 9% of total traffic is paid

Average PPC spend per site in the industry is \$720.6k per month.

Branded terms dominate as the top traffic-driving keywords for both the top organic and paid search keyword lists for this category, meaning that brands should closely monitor and protect their branded terms in their PPC campaigns, especially Giants.

Up-and-comers rely more heavily on paid traffic than the other website groups. Smaller companies should pay attention to this benchmark to ensure they are leveraging paid channels to increase brand awareness in an industry where brand recognition and loyalty is King.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	75.1%	20%	4.7%	0.1%	0.1%
ER	0.8%	0.2%	0.1%	0.1%	0.1%
Comments	1	1	2	5	15
Likes	17	30	64	225	1.7k

Three quarters of all brands in this industry operate on a 'nano' scale on social media, with a follow count between 1k-10k. In fact, **less than 5% of all brands have a follower count above 50k.**

Smaller brands bear the highest engagement rates, around 0.8%. This drops significantly the larger a brand gets.

This brings the average ER for brands in the beauty sector to 0.6%.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	1346	1023	366
Average influencers	697	525	189
Average ER	1.9%	1.3%	1.1%
Average Reach	68m	62m	15m

- The number of influencers working in this industry is vast; large brands partner up with an average of 697 influencers per month, getting approximately 1,346 monthly mentions.
- These influencers bear an average ER of 1.9%, a significant jump from what brands achieve on in-house accounts (0.6%).
- Challenger and up-and-coming brands also work with a relatively large number of influencers, with even smaller brands approaching the 200 mark on average. Engagement rates for these two groups are above 1%, a large jump from the average for the industry.
- **Beauty influencers lean significantly on creating Reels content**, with more than 60% of all post types falling into this category.

Distribution of influencer posts by type

60.4
reels

24.2
sidecar

15.4
image

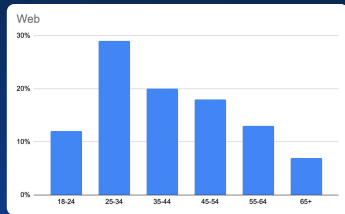
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



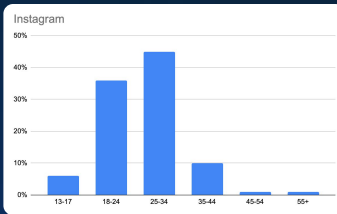
Age:



Instagram:



Age:



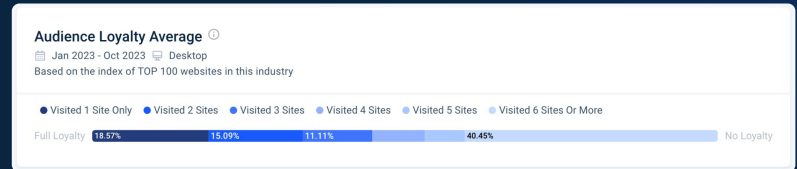
For websites, gender demographics have stayed consistent YoY, with a significantly higher female percentage with 75% vs. 25% male.

There is similar gender split on Instagram, which is also predominantly female (72%).

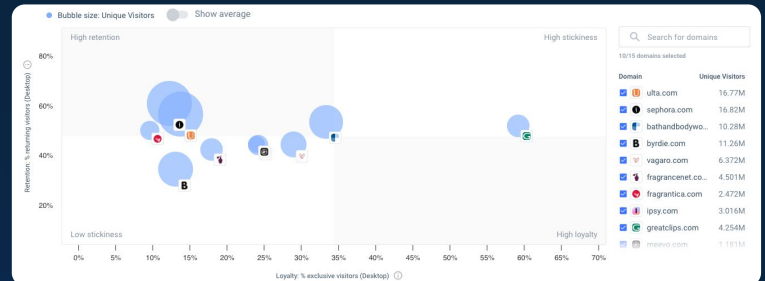
On Instagram, 87% of the audience are under 35, whereas on web traffic, this cohort is 41%. On the other hand, **over 35s may account for only 12% of Instagram's traffic, but represent 59% of web traffic.**

LOYALTY

Similarweb's loyalty metric score for this category is low, at 19%. This is good news for Challengers and Up-and-comers as lower loyalty suggests that users are likely to shop around. In fact, after visiting a website, 40% of the audience went on to visit 6 or more other sites.



The brand with the highest loyalty score in the pack is hair salon brand: Great Clips. Most brands struggle to achieve high loyalty in this category.



The background is a solid dark blue. Two overlapping, rounded, pill-shaped shapes are positioned diagonally from the bottom-left towards the top-right. The shape in the foreground is a medium blue, while the one behind it is a slightly lighter shade of blue. The text 'Home and Garden' is centered horizontally and vertically between these two shapes.

Home and Garden

Home and Garden

Average monthly traffic	986.7m	
Demand Traffic	+1.4% YoY	
Top players	Top websites by average monthly visits: 1. Homedepot.com: 178.4m 2. Lowes.com: 101.8m 3. Harborfreight.com: 38.6m 4. Goodhousekeeping.com: 38.3m 5. HGTV.com: 34m	Top for influencer estimated reach: 1. Walmart: 111m 2. Target: 77m 3. Amazon Home: 70.4m 4. Home Depot: 28m 5. HomeGoods: 18m
Top channels	For web traffic: 1. Direct: 39% 2. Organic: 39% 3. Paid search: 12%	
No. of influencers	55.6k home and garden influencers, with total reach of 82m	
Market domination	75% of traffic taken by top 1% of players	
Category difficulty	Medium	

One of the success stories of the pandemic was the rise of the Home and Garden industry. After being told to 'stay at home', we all decided to go for a little glow-up – and this trend is still continuing into 2024.

- 'Home and Garden' category grew by **only 0.2% YoY worldwide** since last year, but in the US alone it grew 1.4%.
- Traffic for this **peaks in January**, with a decline going into February – hello, January sales.
- Mobile traffic stays the strongest; almost **doubling the Desktop numbers** every month throughout 2023 so far.
- While Home Depot continuously comes out on top in terms of web traffic, it could bring in further engagement with **more focus on influencer marketing**.
- Home and Garden scores low for customer loyalty, with a **score of 11.9%**. This shows there is some high competition in the industry, with brands offering the same products or solutions so there's no need for their target audience to be loyal.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	12.5m	924.1k	133k
Direct	5.1m	377k	47.5k
Organic	4.7m	264.8k	44.5k
Paid	1.5m	170.4k	21.9k
Referral	239.5k	34.6k	5.8k
Email	258.2k	19.8k	3.3k
Display	427k	34k	5.3k
Social	256.9k	23.4k	4.7k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

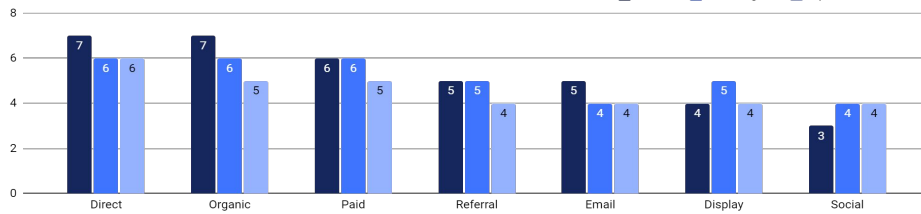
- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

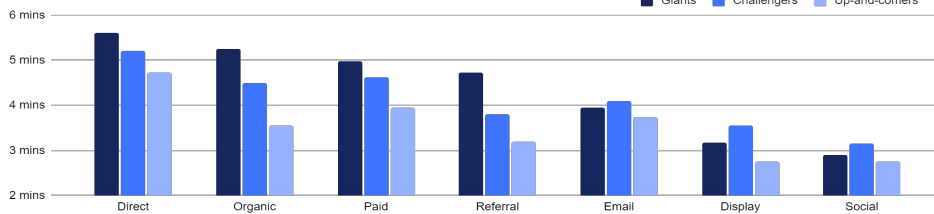
- It's a close fight between direct traffic and organic search traffic, showing it's not all about brand awareness in this industry and investing in SEO will really make the difference for smaller or growing brands.
- All traffic for Giants (1-10) is almost **10x the total traffic** for Up-and-comers.
- The Giants get just under 1.5 million visits through paid traffic alone, which is **9298.5% more** than Up-and-comers see in their total traffic.
- Email sees the lowest amount of traffic for both Challengers and Up-and-comers, whereas referral is the lowest for the Giants.

Digital marketing benchmarks: Engagement

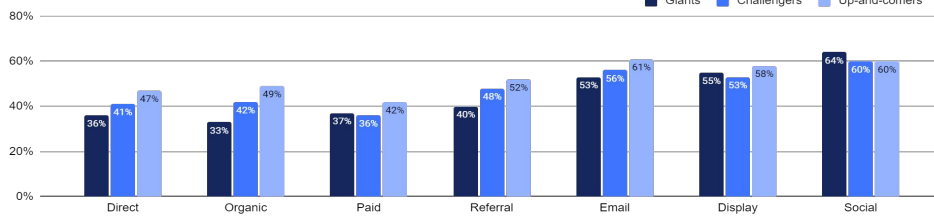
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

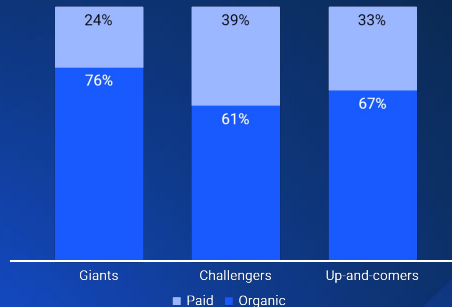
- The pages per visit for every channel are quite consistent across the cohorts, proving how **user experience** is a crucial factor in engagement.
- Visit duration for the Challengers from email marketing is a **whole 9 seconds above** the Giants, indicating good use of segmentation and valuable content for each segment.
- The bounce rate for Up-and-comers is significantly higher than Giants and Challengers, showing a **need to improve the UX** and the customer journey with things like site speed, optimized CTAs, and user flows.
- Up-and-comers struggle with the visit duration from organic traffic, pointing out their meta data might not be matching up to what's on the page, and the user hasn't got the experience they hoped for.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic – equating to around 47-50%, which is consistent across all three cohorts (from giants to up-and-comers).

For marketing teams it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 37.3% of total traffic is organic

Challengers: 28.7% of total traffic is organic

Up-and-comers: 33.5% of total traffic is organic

In 2023 so far, “portable air conditioner”, “best air purifier” and “dehumidifier” make the top 20 for organic keywords in this industry, showing the interest of health and wellness within the home.

“how to” questions take up 42 of the top 50 search terms with question query filter and non-branded terms, in this industry – that’s 84%. This should inform your content strategy.

The leaders on organic search specifically are Home Depot, Lowes, IKEA, Good Housekeeping, and The Spruce; an order differing slightly from the overall top category leaders showing a difference in strategy.

PAID

Giants: 24.2% of total traffic is paid

Challengers: 39.2% of total traffic is paid

Up-and-comers: 33% of total traffic is paid

Average PPC spend per site in the industry is \$2.3m per month, which is high compared to other industries.

34% of the top 50 question query search terms start with ‘how much’ – this is a high intent query, and therefore good to prioritize for paid traffic.

In terms of trending keywords for paid, “best air fryer” and “best electric toothbrush” are in the top 10, showing the power of superlatives.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	73.8%	19.7%	6.1%	0.3%	0.3%
ER%	0.8%	0.3%	0.2%	0.1%	0.1%
Comments	1	1	2	6	17
Likes	18	35	81	322	1.7k

Most Home and Garden brands fall onto the smaller side, at 1k-10k followers, or 10k-50k.

Only around 7% of the total number of brands in this industry have a follower count higher than 50k.

Engagement rates for brand accounts in this industry are fairly low; smaller brands have just over 0.8% the highest at just below 0.5%, with the rate falling below 0.1% on the highest end.

This brings the industry average to 0.3%.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	334	112	84
Average influencers	227	77	48
Average ER	1.8%	1.4%	1.4%
Average Reach	9.7m	3.1m	1.5m

- Home and garden brands have a lot to gain from influencer marketing; looking at the data, influencers working with Challengers and Up-and-coming brands bear an ER of 1.4%.
- Giants tend to work with more influencers, at 227 per month, and get a slightly higher ER of 1.8% from 334 monthly mentions.
- These figures are 4-5 times higher than brand engagement rates, showing a need to partner with influencers to have a meaningful impact on social media.
- Influencers in this category have a strong focus on Reels at nearly two-thirds of all posts, with carousel and image posts splitting the final third.

Distribution of influencer posts by type

64.5
reels

17.9
sidecar

17.6
image

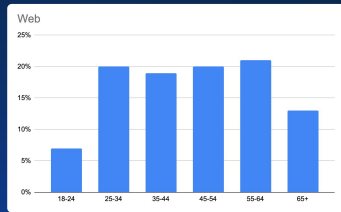
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



Age:



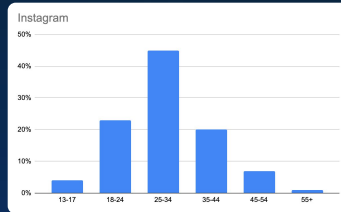
There's been a major shift in website demographics over the past year for this category in terms of gender – the male audience has grown from 31% in 2022 to 44% in 2023.

The majority of Home and Garden fans on Instagram are within the age 25-34 bracket, but sees a steep decline past the age bracket of 35-44.

Instagram:



Age:



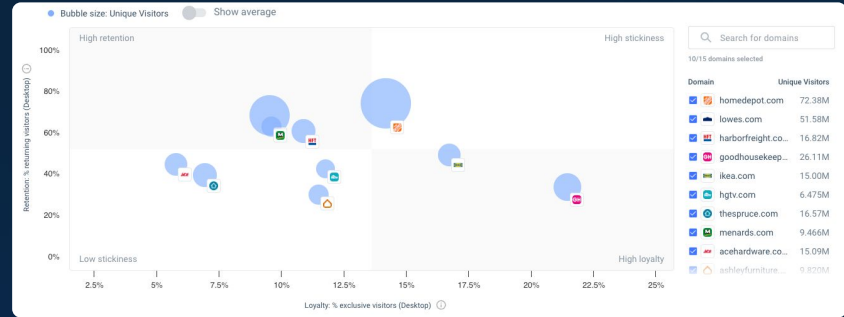
LOYALTY

Similarweb's loyalty metric score for this category is low, at 11.9%, although it's not quite as low as the ultra competitive industry of Fashion and Apparel, which scores 8.4%. The lower the score, the higher the indication that your target audience shops around, so it's all about gaining the competitive advantage. Brands can look to Good Housekeeping for inspiration here – it has the highest loyalty in the industry.

Audience Loyalty Average

Jan 2023 - Oct 2023 Desktop
Based on the index of TOP 100 websites in this industry

Visited 1 Site Only Visited 2 Sites Visited 3 Sites Visited 4 Sites Visited 5 Sites Visited 6 Sites Or More



Jewelry & Luxury

The image features a dark blue background with two overlapping, rounded, purple shapes. The larger shape is on the right, and the smaller one is on the left, partially overlapping the larger one. The text 'Jewelry & Luxury' is centered in white, bold, sans-serif font.

Jewelry & Luxury

Average monthly traffic	99.2m												
Demand Traffic	+11.5% YoY												
Top players	<table><tr><td>Top websites by average monthly visits:</td><td>Top for influencer estimated reach:</td></tr><tr><td>1. Brilliantearth.com 7.9m</td><td>1. Louis Vuitton: 104m</td></tr><tr><td>2. Jomashop: 5.6m</td><td>2. GUCCI: 97.1m</td></tr><tr><td>3. Kay: 5.5m</td><td>3. Dior: 70.3m</td></tr><tr><td>4. Pandora: 4.3m</td><td>4. Prada: 70m</td></tr><tr><td>5. Zales: 3.4m</td><td>5. Chanel: 54m</td></tr></table>	Top websites by average monthly visits:	Top for influencer estimated reach:	1. Brilliantearth.com 7.9m	1. Louis Vuitton: 104m	2. Jomashop: 5.6m	2. GUCCI: 97.1m	3. Kay: 5.5m	3. Dior: 70.3m	4. Pandora: 4.3m	4. Prada: 70m	5. Zales: 3.4m	5. Chanel: 54m
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4. Pandora: 4.3m	4. Prada: 70m												
5. Zales: 3.4m	5. Chanel: 54m												
Top channels	For web traffic: 1. Direct: 40% 2. Organic: 31% 3. Paid search: 16%												
No. of influencers	9k jewelry and luxury influencers, with total reach of 121m												
Market domination	44% of traffic taken by top 1% of players												
Category difficulty	Medium												

As the economy began to stabilize in 2023, demand for jewelry and other luxury products increased as people grew in confidence to make more significant purchases and focus on luxury products. With 11.5% YoY growth, marketers can expect this to continue in 2024.

- Monthly traffic gradually increased from the start of 2022 and **peaked in November and December**, which coincides with Black Friday and holiday shopping (and bonus season).
- Brilliant Earth, a sustainable jewelry brand, is the overall traffic leader in the industry with almost 8m monthly visits, showing shoppers are more interested in ethically sourced goods.
- With popular brands like Pandora and Jomashop topping the charts, direct traffic leads in this industry with 40% share of traffic, but organic is not far behind with 31%.
- With such significant reach, it's clear influencer marketing is a critical tool for both established and emerging brands in the jewelry and luxury industry, playing a key role in enhancing brand visibility, prestige, and customer engagement.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	785.1k	174.9k	22.2k
Direct	318k	66.9k	7.7k
Organic	222.1k	55k	6.9k
Paid	138.8k	29.2k	3.2k
Referral	18.3k	6.7k	908
Email	11k	4k	1.1k
Display	55.6k	6.5k	1.1k
Social	21.3k	6.6k	1.2k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

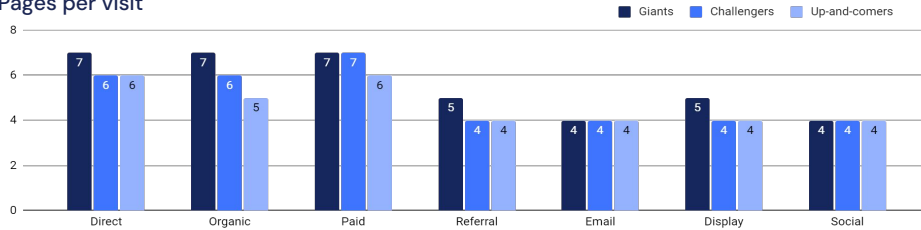
- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

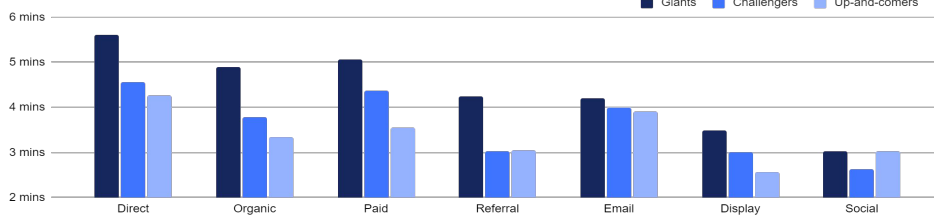
- The benchmark for total traffic for the Giants is 785.1k, 174.9k for Challengers and 22.2k for Up-and-comers. **That's a difference of 3,444% between the Giants and Up-and-comers.**
- Spending on paid search is relatively consistent across the categories, with Giants relying the most on paid traffic (17.7%) and Up-and-comers the least (14.6%).
- Direct and paid traffic has grown YoY by 3% and 2% respectively, but **organic traffic has decreased from 34% in 2022 to 30% to 2023**, suggesting the SERPs are becoming more fiercely competitive and budget is required to thrive.
- Referral and email channels are not prioritized by any of the traffic leaders.

Digital marketing benchmarks: Engagement

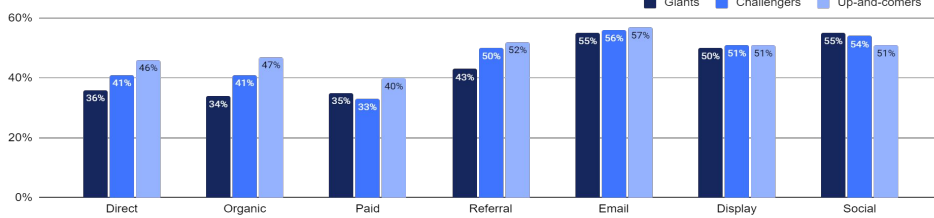
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

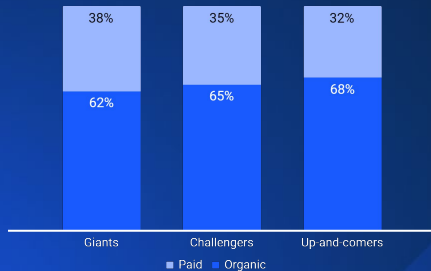
- Unsurprisingly, the Giants have the the most pages per visits, longest visit duration and lowest bounce rates (on average) across every channel compared with the other cohorts.
- **The benchmark for bounce rate in paid search is lowest across all categories,** suggesting that all brands within the Jewelry & Luxury Products industry spend time and effort optimizing their paid landing pages.
- The Up-and-comers kept pace with the other categories with their pages per visits in direct, organic and paid, showing where these brands are investing the most to drive engagement and boost user experience.
- Marketers should pay particular attention to engagement benchmarks in this category as price points are high, and engagement is a good marker of consumer trust.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic. The traffic share for each cohort is 39.8% for Giants, 30.1% for Challengers and 42.9% for Up-and-comers. That's a 10% difference between the 'up-and-comers' and 'challengers', showing that smaller brands are more focused on search overall.

For marketing teams it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 29% of total traffic is organic

Challengers: 31% of total traffic is organic

Up-and-comers: 31% of total traffic is organic

It's a close contest between direct traffic and organic traffic in the Beauty and Cosmetic industry..

Direct and branded organic traffic together equates to nearly 60% of the industry's overall traffic. 93% of the top 100 organic keywords so far in 2023 are branded terms, with '**pandora**' and '**rolex**' topping the list.

When reviewing the top non-branded keywords, shoppers' growing preference for sustainable (or less pricey) jewelry becomes clear. In top 50 organic keywords there are multiple references to '**lab grown diamonds**', '**moissanite**' and '**moissanite rings**'.

PAID

Giants 18% of total traffic is paid

Challengers: 17% of total traffic is paid

Up-and-comers: 15% of total traffic is paid

Average PPC spend per site in the industry is \$574.1k per month.

Across both the top organic and paid keywords within the category, branded keywords drive the most traffic by far. High-end watch and jewelry brands, Rolex, Cartier and Tiffany & Co are the top paid keywords.

Giants, who rely most on paid traffic, should monitor and protect their branded terms, as dupes and ad-hijacking are common in this industry..

60% of the top non-branded paid keywords are wedding-related, with '**engagement rings**' driving the most traffic.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	71.6%	21.8%	6.2%	0.2%	0.1%
ER	0.7%	0.3%	0.2%	0.1%	0.1%
Comments	0	1	2	4	18
Likes	16	33	79	277	2.6K

Many of the brands in the Jewelry and Luxury industry fall on the smaller end, with nearly three-quarters exhibiting under 10,000 followers. This indicates a lot of smaller brands and new businesses entering the industry and maintaining a presence on social media.

Engagement rates for brands in this industry are highest among those with fewer followers – this number decreases as brands grow in size.

It's interesting to note that ER stabilizes around 0.1% on the higher end, with brands among the 50-500k, 500k-1M and 1M+ groups maintaining similar engagement rates.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	254	310	32
Average influencers	180	181	18
Average ER	2.2%	2%	1.7%
Average Reach	13m	8.3m	0.8m

- On average, both Giant and Challenger brands work with around 180 influencers; the Giants gained 254 average monthly mentions, with Challengers getting 310. Interestingly, Giants held a slightly higher engagement rate.
- Smaller brands worked with far fewer influencers, which is to be expected with smaller budgets; regardless, they still achieved an impressive ER of 1.7% from these collaborations.
- Across the board, engagement rates are over 3-4 times that of brand accounts, showing influencer marketing to be an imperative strategy in this industry when it comes to connecting with audiences.
- It's interesting to note that **influencers make use of a nearly-equal distribution of image, carousel, and Reels posts**, with the latter just edging out ahead.

Distribution of influencer posts by type

37

reels

32.2

sidecar

30.8

image

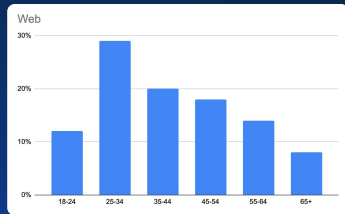
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



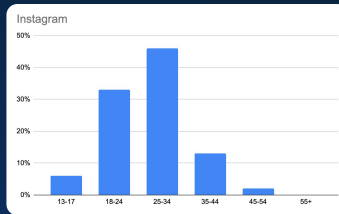
Age:



Instagram:



Age:



For web traffic, the female audience is slightly higher with 56% vs. 44%.

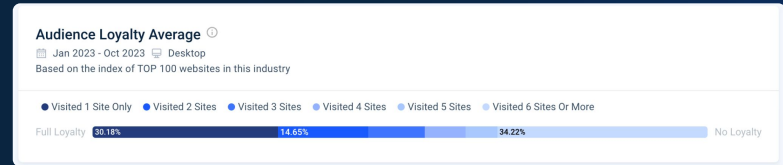
The gender split on Instagram is significantly different, with a much stronger female audience (70%).

On Instagram, 84% of the audience is under 35, whereas on web traffic, this age group makes up only 41%.

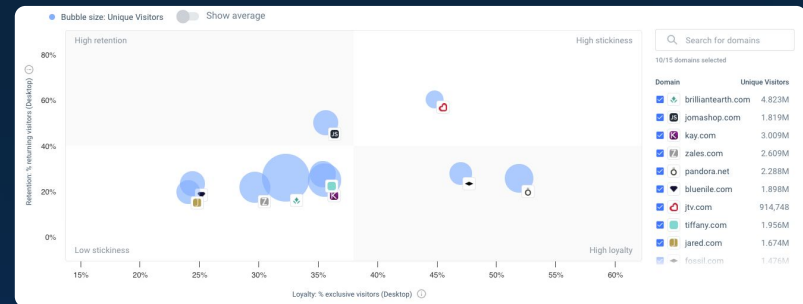
While the over 35s may account for only 16% of Instagram's traffic, they represent an impressive 60% of web traffic.

LOYALTY

Similarweb's loyalty metric score for this category is low, at 19%. This is good news for Challengers and Up-and-comers as lower loyalty suggests that users are likely to shop around. In fact, after visiting a website, 40% of the audience went on to visit 6 or more.



Brands with the highest audience loyalty in this category are Pandora, Fossil and JTV, all of whom marketers can review for inspiration on how to increase customer loyalty.



The background is a solid dark blue. Two large, overlapping, rounded teal shapes are positioned on the right side of the frame. The top shape is larger and more rounded, while the bottom shape is smaller and more elongated. They overlap each other and the text.

Consumer Electronics

Consumer Electronics

Average monthly traffic

603.2m

Demand Traffic

-3.7% YoY

Top players

Top websites by average monthly visits:

1. Apple.com: **152.1m**
2. Bestbuy.com: **91.6m**
3. Samsung.com: **79.1m**
4. Salesforce: **34.8m**
5. Ring.com: **3.4m**

Top for influencer estimated reach:

1. Samsung: **67m**
2. Apple: **46m**
3. PlayStation: **45.2m**
4. DJI: **28m**
5. Dyson: **19m**

Top channels

For web traffic:

1. Direct: **44%**
2. Organic: **37%**
3. Paid search: **7%**

No. of influencers

2.5k electronics Influencers, with total reach of **19m**

Market domination

82% of traffic taken by **top 1%** of players

Category difficulty

Medium

The year was marked by rapid technological advancements and shifting consumer demands in the Consumer Electronics industry. And in 2024, marketers can expect this to continue.

- Traffic for the Consumer Electronics category decreased by 5.8% YoY worldwide, and 3.7% in US.
- Although traffic is steady throughout the year, it **peaks around Black Friday and the holiday season**, with mobile traffic dominating.
- With big brands like Apple, Samsung and Salesforce leading the category, it's no surprise that direct traffic reigns supreme, accounting for 43% of total traffic – up from 41% in 2022.
- **Referral is the third biggest channel here**, in every other industry the third biggest channel is paid.
- This isn't a huge category for influencer marketing, but the reach is 19m and engagement levels for influencers are 4-5x higher than that of brands own channels.
- Even though the category has 'medium' market difficulty, 82% of traffic is taken by the top 1% of websites, making it harder for smaller businesses to break into.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	17.1m	900.8k	51.6k
Direct	7.4m	386.7k	19.3k
Organic	6.3m	326.5k	19.6k
Paid	1.1m	70.3k	4.6k
Referral	1.3m	52.7k	3k
Email	323.8k	16.7k	1.6k
Display	271.8k	24.4k	1.6k
Social	423.4k	23.5k	1.6k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

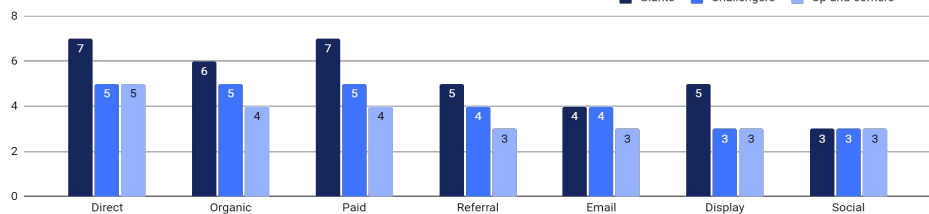
- **Giants:** the top 10 websites in the industry with the most traffic
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- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

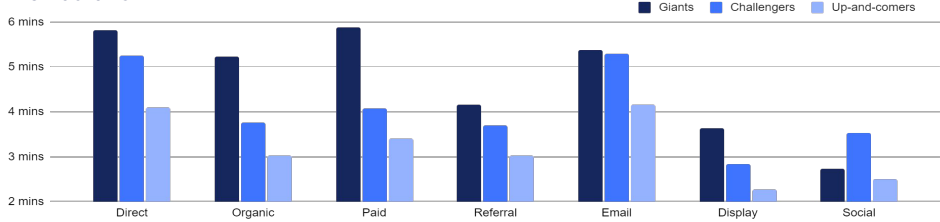
- **The All Traffic benchmark for the Giants is a whopping 17.1m monthly visits**, with 82% of traffic belonging to the top 1% of websites.
- The All Traffic benchmarks for the Challengers is 900k and for the Up-and-comers, 52k.
- There's a difference of over 33,000% between the total traffic of the Giants and the Up-and-comers.
- **Overall organic search traffic is down 8% YoY but paid search increased by the same amount**, suggesting that brands in this category are starting to invest more in their paid strategies.
- Unsurprisingly, Apple and Best Buy are the top traffic leaders across every channel.

Digital marketing benchmarks: Engagement

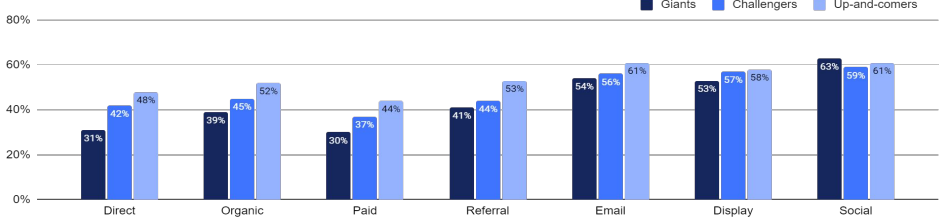
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

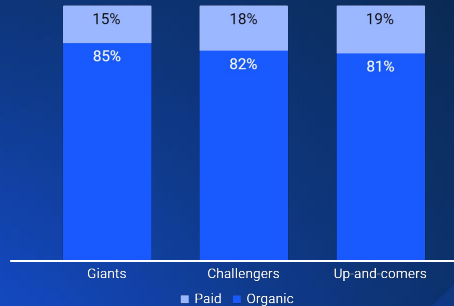
- The Giants lead in terms of engagement levels, with the most pages per visits, visit duration and lowest bounce rates (on average) across all channels.
- The Challengers, however, are close contenders in direct, referral and paid traffic. In fact, Challengers get just as much email engagement as the Giants.
- **Bounce rates are lowest for paid search overall**, but at 44% for the Up-and-comers group, there's still a lot of room for optimization.
- Social is the lowest performing channel for each website group, which is consistent with several other industries.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic – equating to around 42 – 46%, which is consistent across all three cohorts (from Giants to Up-and-comers).

For marketing teams it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 36.6% of total traffic is organic

Challengers: 36.3% of total traffic is organic

Up-and-comers: 37.9% of total traffic is organic

Direct may take the biggest slice of traffic (43.4%) in the Consumer Electronics category, but organic isn't far behind (36.6%)

Together, direct and branded organic traffic make up 59.9% of overall traffic suggesting strong brand recognition and loyalty rules the roost in this category.

Of the top 100 organic keyword, 97% are branded terms. **The top 5 players all have between 50–94% share of traffic from branded terms**, further proving the need for strong brand identity and awareness.

When filtering the top organic keywords by 'question queries', 72% were 'how to' searches, which can be used to inform content strategies in 2024.

PAID

Giants: 6.2% of total traffic is paid

Challengers: 7.8% of total traffic is paid

Up-and-comers: 8.9% of total traffic is paid

The average PPC spend per site in the industry is \$845.9k per month.

Apple dominates the search arena, getting 41.5m monthly searches from organic and paid channels combined. In fact, 40% of the top 100 paid keywords lead directly to Apple.

Branded keywords drive the most traffic in the Consumer Electronics category, both organically and through paid search. With such an emphasis on brand recognition, giants in particular should protect their branded terms in PPC campaigns to stop others capitalizing on their traffic.

Up-and-comers should take note of their paid search benchmark to ensure they utilize this channel to increase their brand awareness.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	73.7%	18%	7%	0.5%	0.8%
ER	0.7%	0.3%	0.2%	0.1%	0.1%
Comments	0	0	2	5	46
Likes	15	33	102	432	3.5K

- The majority of Electronics and Tech brands fall into the 1k-10k and 10k-50k follower count tiers.
- **Less than 10% have a follower count above 50k**, with just over 1% falling above 500k.
- Brands accounts in this industry garner lower engagement rates, with averages all below 1% – small brands get the highest at 0.7%, while the biggest brands get an average of 0.1%.
- This brings the industry average across the board to 0.6%.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	723	416	86
Average influencers	447	235	49
Average ER	2.8%	2.7%	2.1%
Average Reach	33m	11m	2.6m

- Influencer collaborations yield positive results for brands in this sector. Giants tend to work with a higher number of influencers per month: 447, resulting in 723 mentions and an ER of 2.8%.
- Challengers got similar results from influencer collaborations with an ER of 2.7%, while Up-and-comers, who also worked with fewer influencers on average, garnered an ER of 2.1% from their partnerships.
- **Influencer collaborations saw the average ER hit levels 4-5 times higher than what brand accounts could achieve on their own.**
- Influencers in this category also focus their content on Reels, with over 50% of all posts; images came in second with around 27%, while carousel posts were the least popular at under 20% of all posts.

Distribution of influencer posts by type

53.6
reels

19.3
sidecar

27.1
image

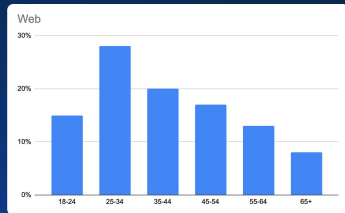
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



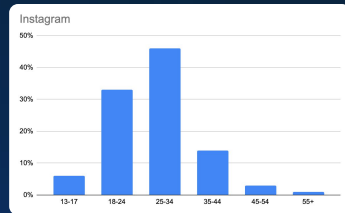
Age:



Instagram:



Age:



For web traffic, the audience skews slightly towards male, with 56% vs. 44% female. The gender split on Instagram is similar with an audience that is 60% male and 40% female.

On Instagram, 86% of the audience is under 35, whereas on web traffic, this age group makes up only 43%.

The over 35s have a much stronger presence on web, driving over 60% of web traffic.

LOYALTY

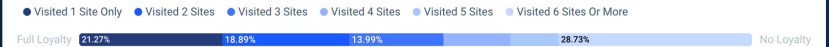
Similarweb's loyalty metric score for this category is low, at 21%

While it's not great news for most, a low level of audience loyalty means more opportunity with 59% of users going on to visit 3 websites or more.

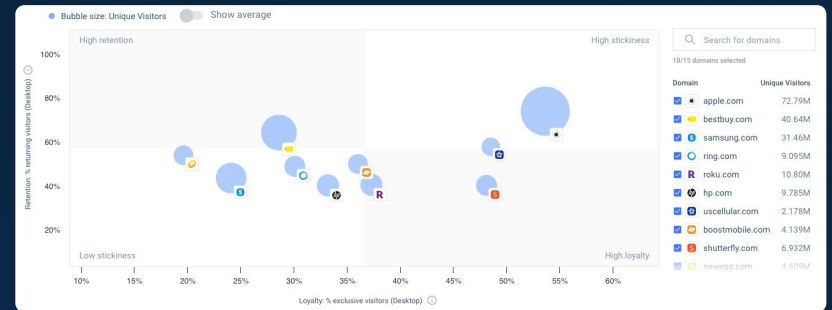
Audience Loyalty Average

Jan 2023 - Oct 2023 Desktop

Based on the index of TOP 100 websites in this industry



Brands with the most audience loyalty in this category are Apple, UScellular and Shutterfly.





Fashion and Apparel

Fashion and Apparel

Average monthly traffic	1.3bn		
Demand Traffic	+4.7 YoY		
Top players	<table><tr><td>Top websites by average monthly visits: 1. Macy's 84.6m 2. Gap.com: 77.1m 3. Shein.com: 67.5m 4. Nike.com 55.7m 5. Nordstrom: 45m</td><td>Top for influencer estimated reach: 1. Louis Vuitton: 104m 2. Gucci: 93.9m 3. Calvin Klein: 75.6m 4. Dior: 74m 5. Amazon Fashion: 70.4m</td></tr></table>	Top websites by average monthly visits: 1. Macy's 84.6m 2. Gap.com: 77.1m 3. Shein.com: 67.5m 4. Nike.com 55.7m 5. Nordstrom: 45m	Top for influencer estimated reach: 1. Louis Vuitton: 104m 2. Gucci: 93.9m 3. Calvin Klein: 75.6m 4. Dior: 74m 5. Amazon Fashion: 70.4m
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Top channels	For web traffic: 1. Direct: 48% 2. Organic: 23% 3. Paid search: 15%		
No. of influencers	21k fashion Influencers, with total reach of 327m		
Market domination	52% of traffic taken by top 1% of players		
Category difficulty	Medium		

As an industry of giants but also an industry where many businesses try to break into the US market, it's crucial to compare yourself against true competitors, set yourself realistic KPIs and goals, and follow consumer trends.

- The Fashion and Apparel category grew by **only 0.4% YoY** worldwide, but a strong **4.7% in the US**.
- Traffic numbers surge for this industry in November (the month of Black Friday), with the majority of traffic coming from mobile.
- In a category dominated by big brands like Macys, GAP, Shein and Nike, it's no surprise that Direct traffic dominates, in fact it brings in just **under 50% of the overall traffic**, up by **7.7% from 2022**.
- Ecommerce giant, **Amazon**, is proving itself in the new category of Fashion and Apparel, using Instagram and **influencer marketing as its power source**.
- Despite being a medium for market difficulty, the costs are high with the **average PPC spend per site in the industry being \$4m**.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	11.9m	2.3m	305.5k
Direct	5.7m	1.1m	134.1k
Organic	2.5m	542.6k	69.7k
Paid	1.8m	349.1k	49.1k
Referral	174.3k	55.7k	11.8k
Email	365.9k	40.3k	6.4k
Display	860.1k	126k	17.6k
Social	459.5k	78.4k	16.7k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

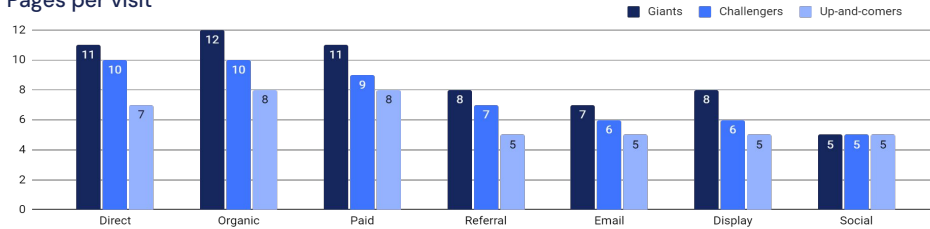
- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

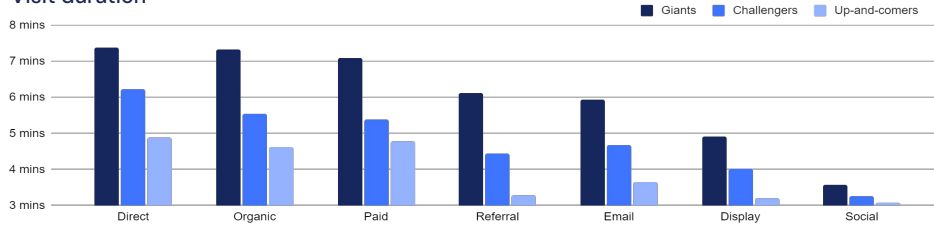
- All traffic monthly benchmark for the Giant (1-10) cohort is just under 12m - which is **82.3% of the category's total traffic**.
- All traffic for Challengers (11-100) stands at **2.3m**, and Up-and-comers (101-1000) should be aiming for around **305k**.
- In fact, all traffic for Giants is **136% more** than that of Challengers, and **190% more** than Up-and-comers.
- Email marketing is seen as the lowest source of traffic for both Challengers and Up-and-comers in the industry, with referral coming a close second.
- Referral traffic may be small in comparison to the industry traffic channels as a whole, but we see Nike.com in referral leaders, well-known for its partnerships and collaborations with other brands.

Digital marketing benchmarks: Engagement

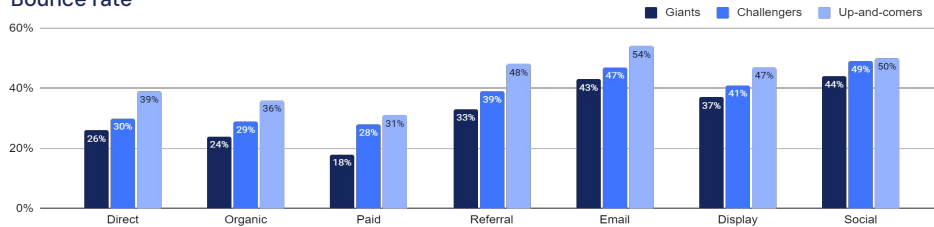
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

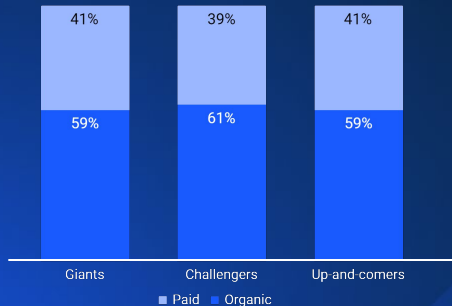
- Up-and-comers have some way to go with their visit duration in comparison to the Giants, with the average amount of time difference being **2 minutes and 6 seconds**.
- The smallest gap between Giants and Up-and-comers for visit duration is through social, with only a **29 second difference** and the same number of pages per visit.
- **Paid marketing** works particularly well for Giants, seeing a very **low 18% bounce rate** on these ads.
- It looks like social media is where fashion and apparel brands struggle the most, with an **average bounce rate of 48%** between the three cohorts. This is most likely due to a focus on social commerce rather than driving visits from social to websites.
- The most pages-per-visit for all three cohorts was through organic traffic, showing the **importance of SEO**, ranking on the first page of Google, and winning SERP features.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic - equating to around 36-39%, which is consistent across all three cohorts (from Giants to Up-and-comers).

For marketing teams it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 21.3% of total traffic is organic

Challengers: 24% of total traffic is organic

Up-and-comers: 22.8% of total traffic is organic

The top 5 leaders on organic search are **Macys, Nordstrom, Shein, GAP, and Nike**; the same top 5 category leaders, but in a different order showing a difference in strategies between them.

The top non-branded and organic search terms included **"wedding guest dresses", "shoes" "prom dresses" "essentials hoodie" "dresses"**

9 out of the top 15 question queries related to the fashion industry on organic search were related to shoes, including **"how to measure shoe size" "how to clean shoes" and "how to clean suede shoes"**.

PAID

Giants: 14.8% of total traffic is paid

Challengers: 15.4% of total traffic is paid

Up-and-comers: 16.1% of total traffic is paid

Average PPC spend per site in the industry is \$4m per month, which is extremely high.

The category leader for paid search is **shein.com**, with a huge average visit time of **12 minutes 55 seconds**, and low bounce rate of **13.33%**.

The top paid keywords for 2023 so far are **"cargo pants", "shoes", "wedding guest dresses", "linen pants"**.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	66.1%	25.8%	7.7%	0.3%	0.2%
ER	0.7%	0.2%	0.2%	0.1%	0.1%
Comments	1	1	2	4	16
Likes	18	29	66	255	2.4K

- In terms of followers, most fashion brands with an active presence on social media fall onto the smaller side, at 1k-10k followers, or 10k-50k.
- A small minority have audiences above the 500k mark.
- Engagement rates for brand accounts in this industry are relatively low; smaller brands have the highest at just above 0.7%, while the largest brands see engagement rates below the 0.1% level.
- This brings the industry average to 0.5%.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	2298	2019	625
Average influencers	1362	1170	395
Average ER	1.8%	1.9%	1.6%
Average Reach	92m	76m	25m

- Fashion brands work with a high amount of influencers – from 395 for Up-and-comers, to 1,362 for Giants.
- There is around a 2-to-1 ratio of mentions to influencers in all tiers.
- In terms of engagement rate, the influencer data differs starkly to that of brand accounts; with 1.6% to 1.9%, influencers achieve engagement rates 3-4 times higher than those of brands.
- Influencer marketing is therefore an unmissable channel for brands in this industry, especially those looking to make a meaningful impact and connect with audiences.
- Influencers in this category also focus their content on Reels and carousel posts, with images trailing behind as the least common choice.

Distribution of influencer posts by type

48
reels

36.4
sidecar

15.6
image

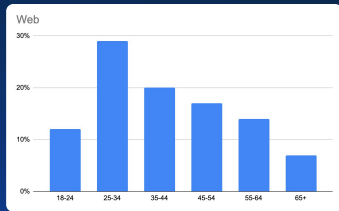
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



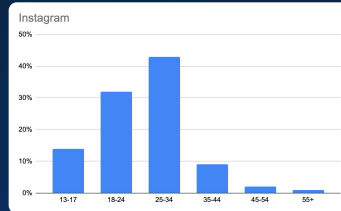
Age:



Instagram:



Age:



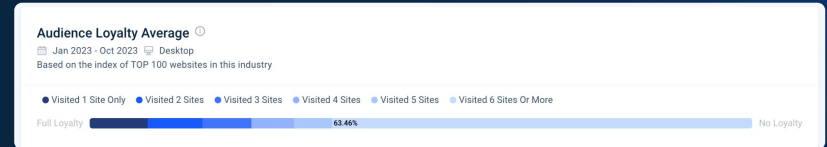
The fashion and apparel fans using the web are predominantly female (67%), however we can see a small increase in **male shoppers** going from **31% in 2022** to **33% in 2023**.

Instagram fashion shoppers clearly start from a young age, with males between the **ages of 13 and 17 taking up 9.6% of the category traffic** from the platform.

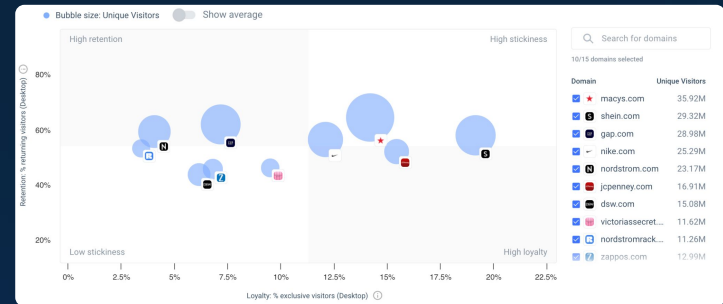
For web traffic, the fashion obsession really kicks off from the **ages of 25-34**, before seeing a relatively slow decline into the older age brackets.

LOYALTY

Similarweb's loyalty metric score for this category is low, at 8.4%.



Fashion and apparel is an incredibly – and increasingly – competitive industry, with multiple ways to gain the competitive edge and grab a target audience's attention. It might be price, quality, sustainability, free delivery, free returns, or discounts.





Pet Food and Supplies

Pet Food and Supplies

Average monthly traffic	167.9m												
Demand Traffic	+7.7 YoY												
Top players	<table><tr><td>Top websites by average monthly visits:</td><td>Top for influencer estimated reach:</td></tr><tr><td>1. chewy.com (40.6m)</td><td>1. PetSmart: 3.8m</td></tr><tr><td>2. Petsmart.com (14.4m)</td><td>2. fi.dogs: 2.5m</td></tr><tr><td>3. Petco.com (14.3m)</td><td>3. Chewy: 1.8m</td></tr><tr><td>4. Thedodo.com (7.2m)</td><td>4. Sassy Woof: 0.4m</td></tr><tr><td>5. Rover.com (6.9m)</td><td>5. The aDoraBle Pooch Co: 0.4m</td></tr></table>	Top websites by average monthly visits:	Top for influencer estimated reach:	1. chewy.com (40.6m)	1. PetSmart: 3.8m	2. Petsmart.com (14.4m)	2. fi.dogs: 2.5m	3. Petco.com (14.3m)	3. Chewy: 1.8m	4. Thedodo.com (7.2m)	4. Sassy Woof: 0.4m	5. Rover.com (6.9m)	5. The aDoraBle Pooch Co: 0.4m
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4. Thedodo.com (7.2m)	4. Sassy Woof: 0.4m												
5. Rover.com (6.9m)	5. The aDoraBle Pooch Co: 0.4m												
Top channels	For web traffic: 1. Direct: 59% 2. Organic: 21% 3. Paid search: 8%												
No. of influencers	21k Influencers, with total reach of 327m												
Market domination	53% of traffic taken by top 1% of players												
Category difficulty	High												

In an animal-loving world, the category of Pet Food and Supplies is as much of an essential as groceries to many.

- Pet Food and Supplies category **grew 8.6% YoY worldwide**, and **7.7% in the US alone**.
- From 2022 to 2023, direct traffic saw a **4.2 percentage point increase** as a traffic source, whereas organic search saw a **decline of 4 percentage points**.
- Direct traffic dominates for both Giants and Challengers, bringing in over **52% and 58% of the traffic for these businesses**, respectively.
- Demand is fairly steady throughout the year, but we've seen a slow increase from April towards the end of the year.
- There's room for more influencers in the world of Pet Food and Supplies, with a gap of 3.4 million in the estimated reach between the category leader, PetSmart and The aDoraBle Pooch Co, who's in at number 5.
- This is a harder category for smaller businesses, with over half of the overall traffic (53%) being taken by the top 10 players.

Digital marketing benchmarks: Traffic

Channel	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
All	3.4m	360.9k	41.6k
Direct	1.8m	210.9k	16.4k
Organic	693.9k	66.9k	10.6k
Paid	564.3k	17.1k	3.3k
Referral	126.8k	37.1k	3.5k
Email	61.1k	12.1k	2k
Display	55.3k	9.3k	3.5k
Social	90.3k	7.2k	2.3k

Benchmarks are split into three cohorts based on the volume of traffic that brand receives to its website, AKA: ordered by the biggest digital players:

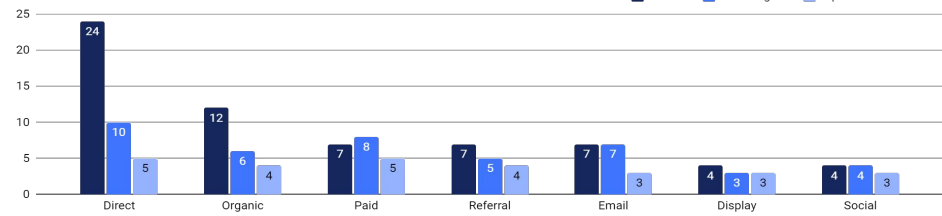
- **Giants:** the top 10 websites in the industry with the most traffic
- **Challengers:** websites in position 11-100 within the industry
- **Up and comers:** websites in position 101 - 1,000 within the industry

*Data from Similarweb

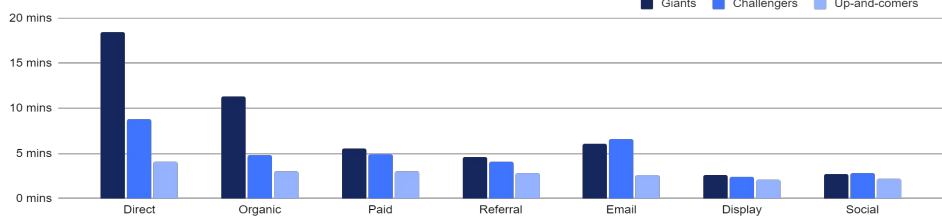
- Referral nearly beats paid search to third place in traffic share, seeing 7.14% compared to paid's 7.5%.
- There's a 161% difference between the amount of direct traffic that giants receive versus the amount Challengers receive.
- Chewy.com is the main leader in this industry, seeing 40.62m monthly visits - compare this to Petsmart which is the second top industry leader, with 14.39m monthly visits. This is a 180.2% difference between the two.
- Email marketing comes in fairly low for all three cohorts - these stats will help determine your strategy. For example, as pet food and supplies are essential for pet owners to some degree, email marketing is less necessary - unless you were promoting a new subscription package or range of dog food to current customers, for example.
- The traffic share from direct traffic for the Up-and-comers is considerably less (39.4%) than the bigger brands who see direct traffic bring in 52.4% (Giants) and 58.4% (Challengers) showing a need to build on brand awareness to stand out as an authoritative brand in this field.

Digital marketing benchmarks: Engagement

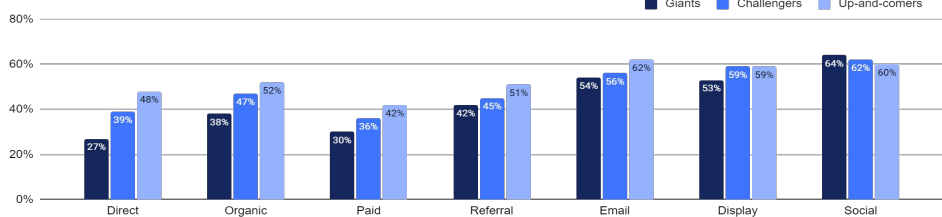
Pages per visit



Visit duration



Bounce rate



*Data from Similarweb

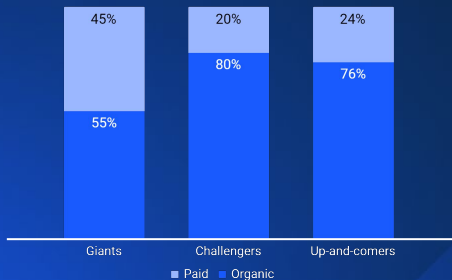
- The average pages-per-visit for Giants through direct traffic is a huge 24 pages, taking up an average visit duration of just under 18 minutes and 30 seconds. This browsing time just shows the range of products, services and information the Giants have.
- Organic traffic also proves successful for the Giants, with an average visit duration of 11 minutes 20 which is over double the visit duration for the Challengers and very nearly quadruple the visit duration of Up-and-comers.
- The bounce rate for the Challengers and Up-and-comers from organic search in particular is on the high-end, indicating the experience on-site doesn't match up to what is advertised on search.
- Despite a low amount of traffic coming from email marketing, the top two cohorts see an average of 7 pages-per-visit which indicates good segmentation and targeting.
- Across all marketing channels, the average number of page visits for the Giants is 9.3, for the Challengers it's 6.1, and for the Up-and-comers it's 3.9.

Digital marketing benchmarks: Search deep-dive

SEARCH OVERALL

Adding organic and paid together gives us the share of 'search' traffic – equating to around 33% for up-and-comers and 38% for giants. However, the traffic share from organic and paid together for challengers skews the consistency quite a bit, seeing only 23% of its traffic from search.

For marketing teams it's also crucial to see the split of organic vs paid as a total, to ensure you're not too far from the industry benchmark, for this category the split stands at:



ORGANIC

Giants: 20.8% of total traffic is organic
Challengers: 18.5% of total traffic is organic
Up-and-comers: 25.5% of total traffic is organic

Giants' average monthly traffic from organic search is over 10x more than Challengers', and around 65.5x the amount of organic visits for Up-and-comers.

One of the top 3 organic keywords for 2023 is **"pet store near me"**, showing how important it is to work on your local SEO

"how to litter train a kitten" saw a huge 356.2% increase in traffic between September and October 2023, indicating an influx of new pets.

Kittens weren't the only new pets either, with **"dog names"** being the 3rd top trending keyword.

PAID

Giants: 16.9% of total traffic is paid
Challengers: 4.8% of total traffic is paid
Up-and-comers: 7.9% of total traffic is paid

Average PPC spend per site in the industry is \$880k per month.

Challengers and Up-and-comers get considerably less traffic through paid marketing, which is likely to do with the high keyword difficulty of the most popular paid keywords.

In terms of non-branded paid keywords, the top three are **"cat tree"**, **"dog food"**, and **"pet supplies"**.

An average PPC spend of \$880k is on the high side, but is largely pushed up because of the big players in the category, on the most competitive terms.

Social benchmarks: Branded channel engagement

# of followers	1k-10k	10k-50k	50k-500k	500k-1M	Over 1M
Distribution	71.3%	21.2%	6.9%	0.3%	0.2%
ER	1.2%	0.7%	0.6%	0.5%	0.6%
Comments	0	2	4	13	79
Likes	28	80	237	1100	13.5k

- Brands in this industry fall on multiple ends of the spectrum in terms of followers, with the smaller end having a higher concentration; nearly three-quarters of brands have under 10,000 followers.
- Conversely, very few brand have managed to break into the Over 1M+ followers tier.
- Engagement rates for brands in this industry are the highest among small brands, a common trend.
- However, an interesting observation is how steadily engagement rates hold as brand size increases.
- Typically there is a more stark drop-off, but Pet Food brands maintain engagement rates around 0.5% or more on the higher end.
- Due to the vast amount of brands under 10K followers, the average engagement rate for this industry is 1.07%.

Social benchmarks: Influencer marketing engagement

	Giants (1-10)	Challengers (11-100)	Up-and-comers (101 - 1,000)
Average monthly mentions	234	36	22
Average influencers	141	27	13
Average ER	3.1%	2.9%	3.5%
Average Reach	19m	0.8m	0.6m

- Engagement rates for influencers in this sector are high across the board, with rates ranging between 2.9% and 3.5%.
- Clearly, influencers have proven successful at generating more interaction with audiences and adding value to the brands they work with.
- Large brands tend to work with a large amount of influencers on a monthly basis, while those outside the top 10 partner with a relatively conservative number of influencers on average.
- In terms of post types, influencers gravitate towards Reels, which naturally yield a higher engagement rate than carousel or static image posts.

Distribution of influencer posts by type

45.8
reels

31.8
sidecar

22.4
image

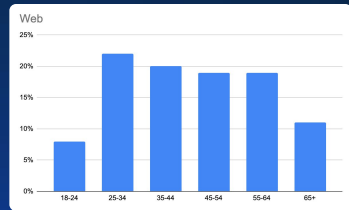
Audience benchmarks: demographics and loyalty

DEMOGRAPHICS

Web:



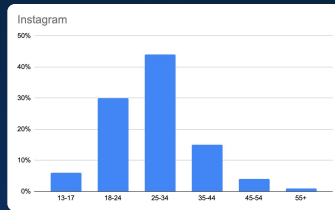
Age:



Instagram:



Age:



Through web traffic, we can see the audience for this industry is predominantly female (67%).

Comparing to 2022, we can only see a slight increase in male audience, moving from 32% to 33%.

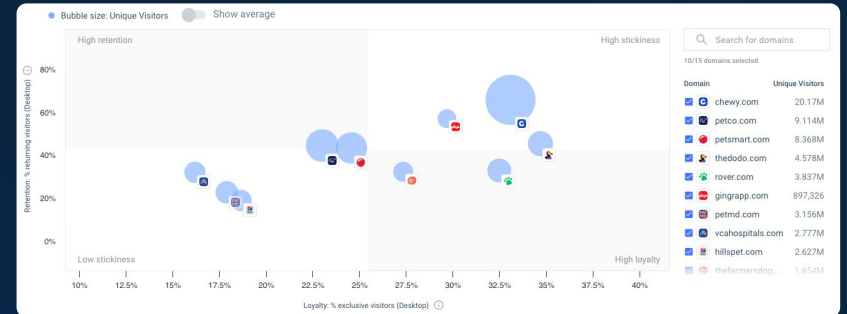
For both Instagram and web, the 24–32 age bracket dominates the entire audience and interestingly, the 18–24 bracket mainly comes via Instagram.

LOYALTY

Similarweb's loyalty metric score for this category is medium, at 25.3%.



Chewy.com takes the lead with its high stickiness, high loyalty and high retention scores, as well as its number of unique visitors. The website's percentage of exclusive customers is 33.1%, which is above average in the industry.



About us



Similarweb is a digital intelligence platform that empowers brands and retailers to grow their digital market share by aggregating insights from real-user online behavior sourced from direct measurement, contributory networks, metered panels, data partnerships, and public data extraction.

Trusted by marketers worldwide, Similarweb provides the data and tools for industry analysis and competitive insight, so businesses can outpace their rivals.



HypeAuditor is an influencers marketing platform with a single mission: to make influencer marketing effective, transparent and pain-free with accurate data that aids both brands and content creators alike. HypeAuditor offers a variety of tools and features that can help solve acute challenges or serve as an all-in-one suite to simplify your influencer marketing strategy.

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