



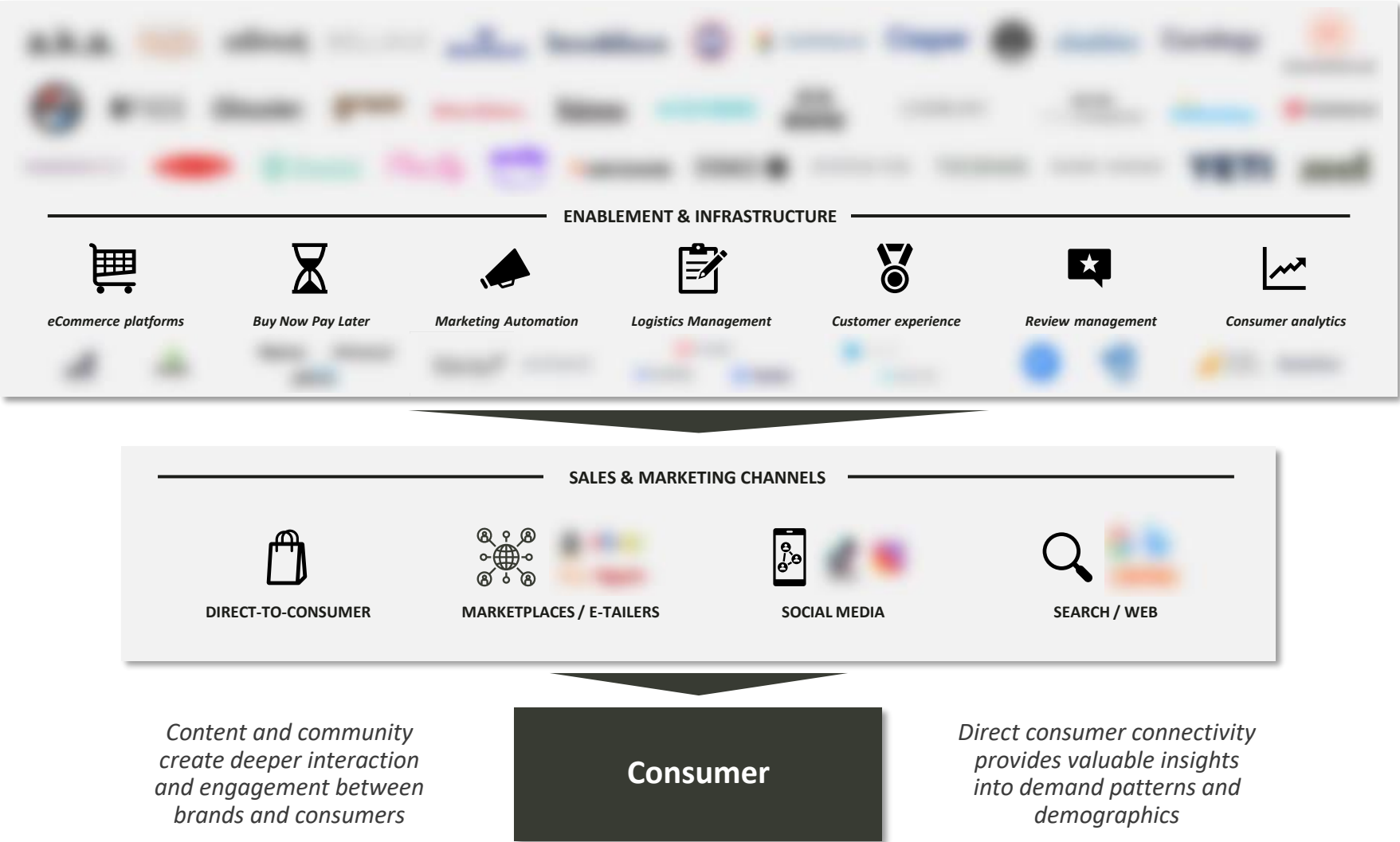
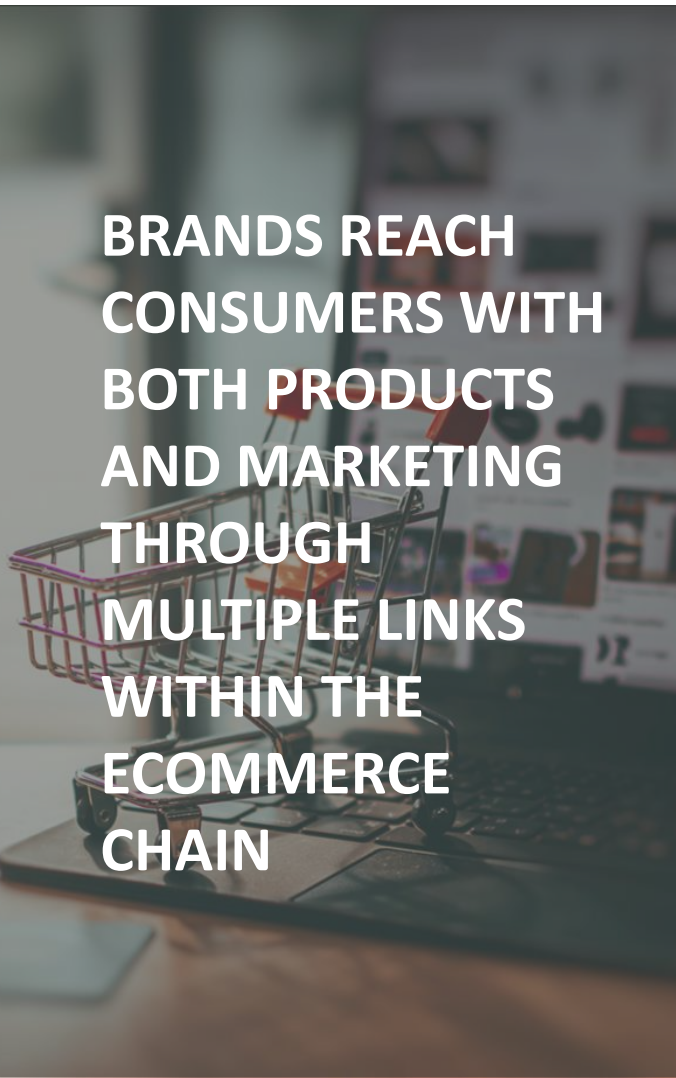
eCommerce Sector Update

Harris Williams | Q1 2023

Mapping the eCommerce Ecosystem

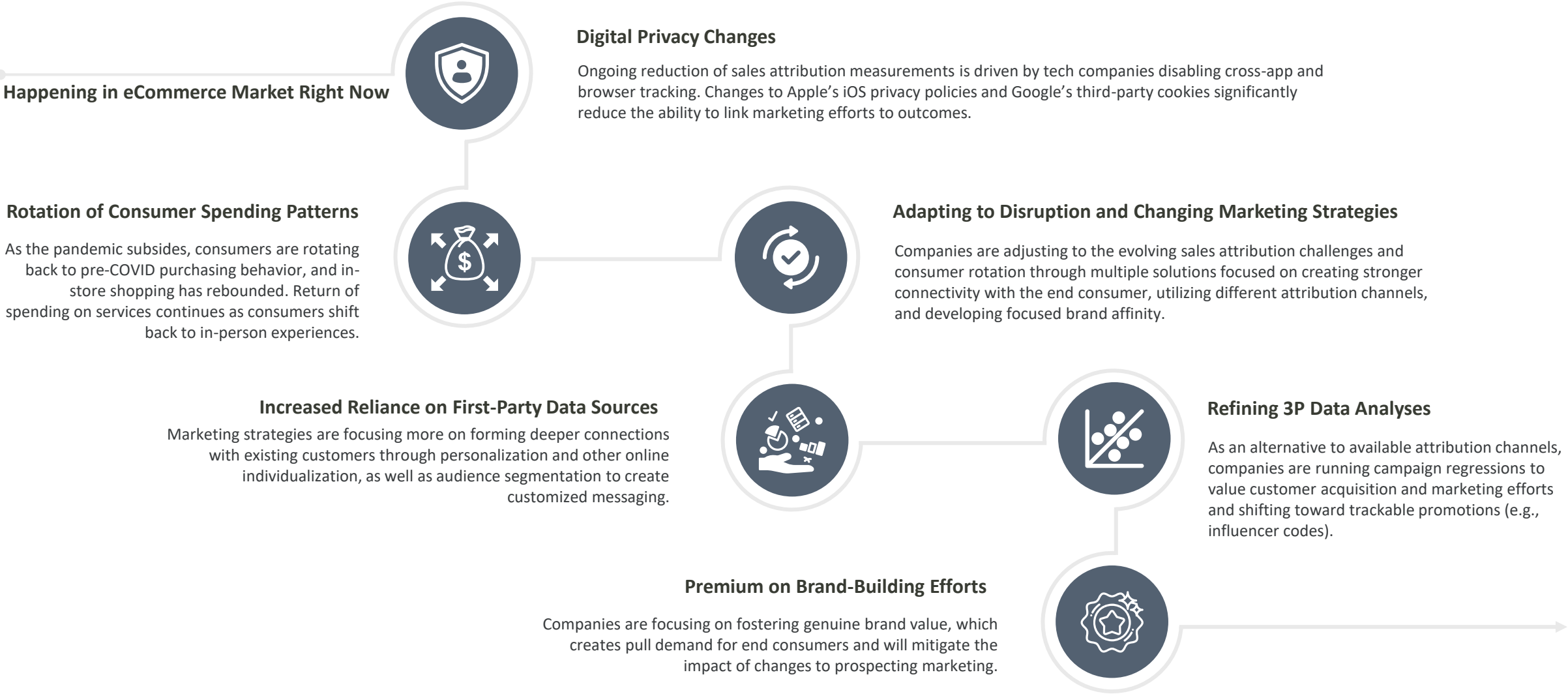
To view the full market map, please contact:
ConsumerInsights@harriswilliams.com

The sector encompasses all providers supporting the digital / online purchases of goods and services.



Key Trends in the eCommerce Market

The eCommerce landscape continues to experience sector disruption, prompting companies to change their marketing playbook.



Deep DTC & eCommerce Sector Experience

Select DTC / eCommerce Clients

DIGITALLY NATIVE BRANDS



OMNICHANNEL BRANDS



CONSUMER-FACING TECHNOLOGY



MARKETING & DATA ANALYTICS



ECOMMERCE ANALYTICS



Insightful Sector Content

- 2022 The Middle Market: eCommerce Will See M&A Growth in Tough Times



[Link to Read](#)

- Industry Update: eCommerce Enablement & Marketplace Technology | May 2022



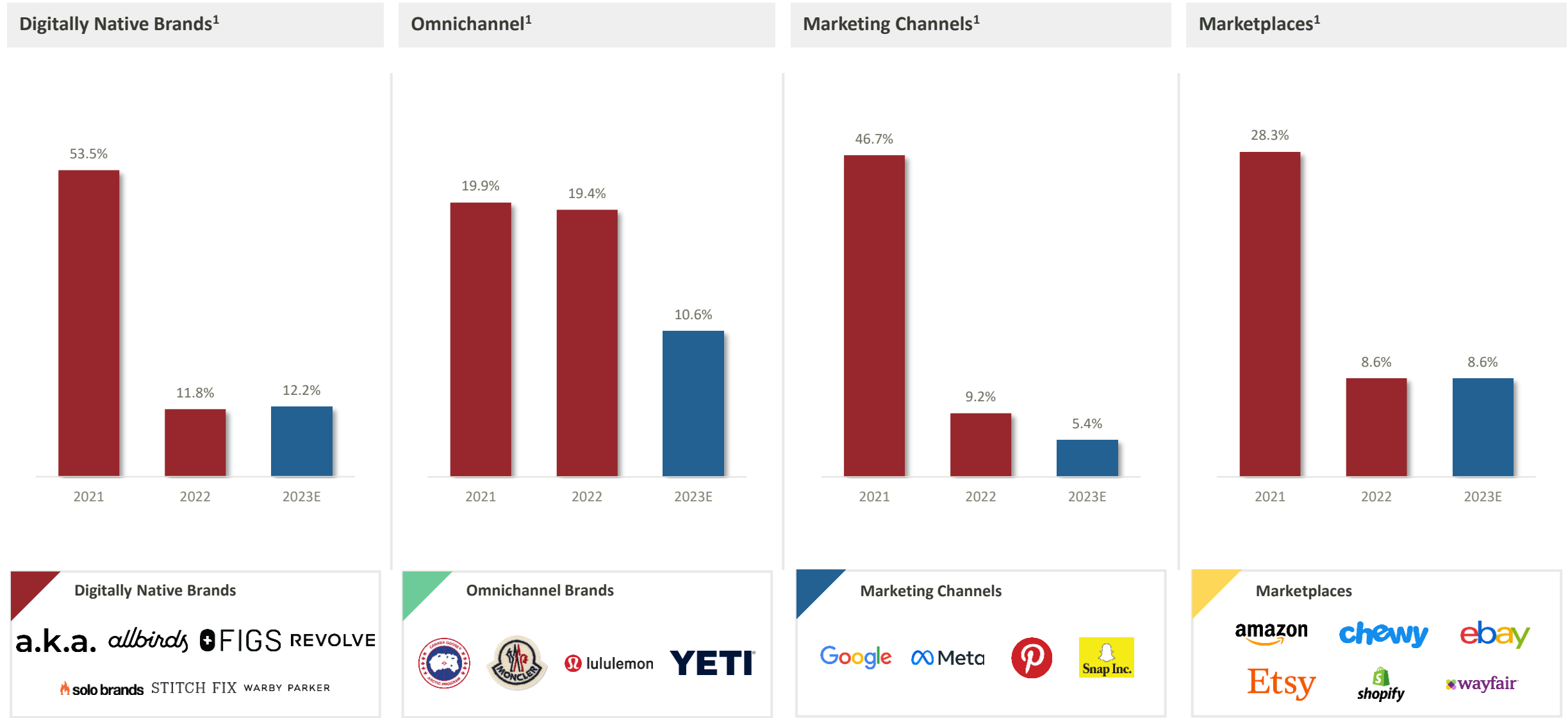
[Link to Read](#)

- Deal Snapshot: Pink Lily | February 2022

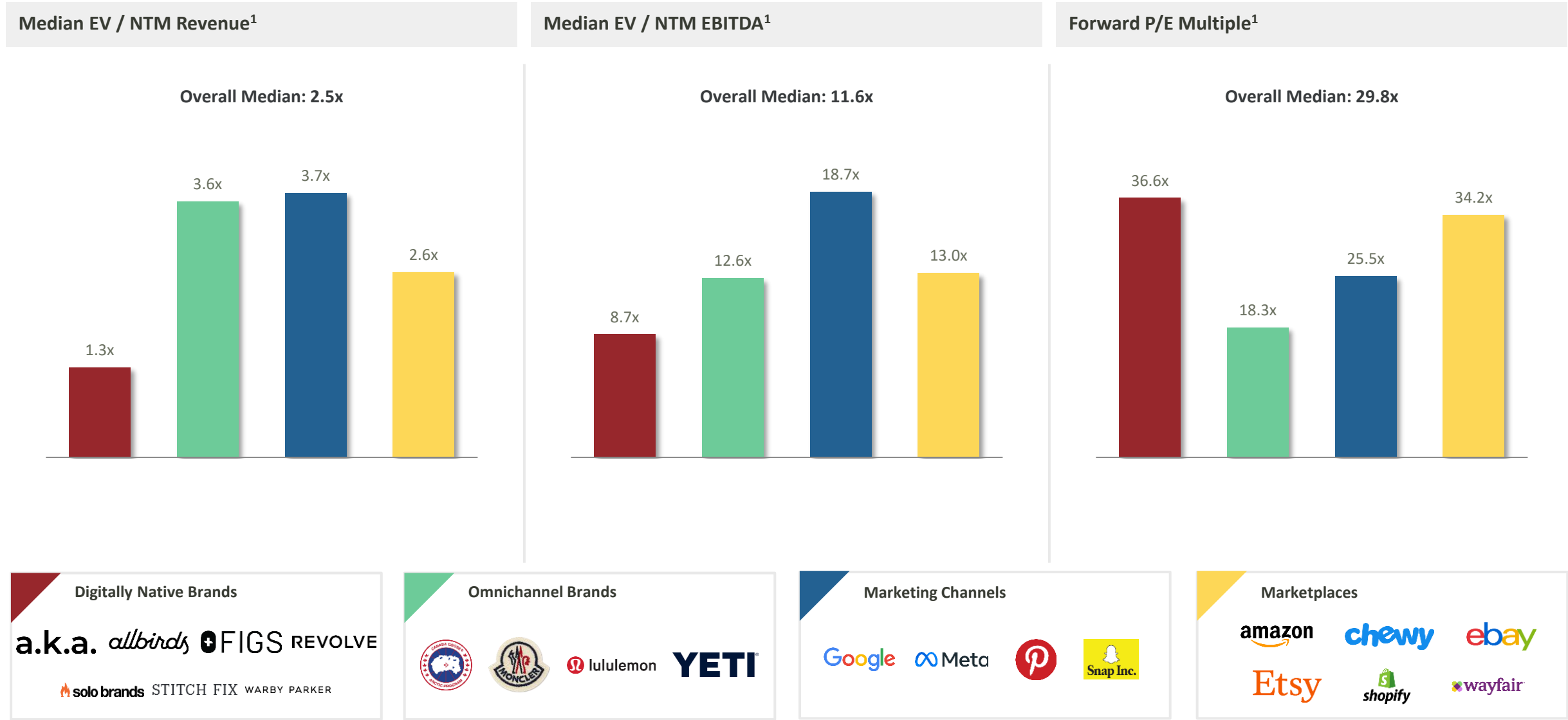


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eCommerce Public Company Operating Metrics – Revenue Growth



eCommerce Public Company Valuation Metrics



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Deep Industry Experience



Aerospace, Defense
& Government Services



Business
Services



Consumer



Energy, Power
& Infrastructure



Healthcare &
Life Sciences



Industrials



Technology



Transportation
& Logistics

Unique Multi-Sector
Coverage
of eCommerce

70% Revenue from
repeat clients

83% Managing directors
promoted from
within the firm

30+ Year
history



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Sources and Disclosures

Sources

- 1. S&P Capital IQ
- 2. Pitchbook

Disclosures and Disclaimers

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