

Video Doorbells Online Scorecard

Online sales of Video Doorbells grew 105% over the last year as consumers embrace the convenience of digitally connected devices in their homes. While a growing number of imitators are now competing for sales, the category is heavily dominated by pioneer Ring and rival Nest, with Ring commanding 82% online market share. Nest has expanded beyond its home thermostat roots and is starting to make significant gains with online sales nearly quadrupling over the past year. This category serves as only the latest front for ongoing battle between titans Amazon (maker of Ring) and Google (maker of Nest), with each seeking to further embed itself in consumer's homes.

This scorecard shows the top smart doorbell brand's performances online and dives into various metrics that have driven their success or resulted in their decline. The Shopper Journey metrics (part of 1010reveal's eCommerce data suite) provide context into the consumer's pre-purchase consideration process.

Video Doorbell Brand	Market Benchmark		Shopper Journey			
	Sales Share	Dollar Spent Growth	Search Driven Conversion	Branded Search Conversion	Avg # of Brands Considered	Percent Winning Sessions
Ring	82.1%	94%	4	1 3	3	1
Nest	13.4%	2 291%	2	1	1	3 3
Arlo	0.6%	N/A	1	2	2	2
August	0.3%	-30%	3	4	4	5
Zmodo	0.3%	-73%	5	5	5	4
	Actuals		Ranked			
Analysis Timeframe: August 2018 -July 2019						

1 Top 10 Search Terms Leading to a Purchase

1. Ring Doorbell
2. Ring
3. Ring Doorbell 2
4. Nest
5. Ring Pro
6. Ring Doorbell Pro
7. Video Doorbell
8. Ring Video Doorbell 2
9. Ring Video Doorbell
10. Nest Doorbell

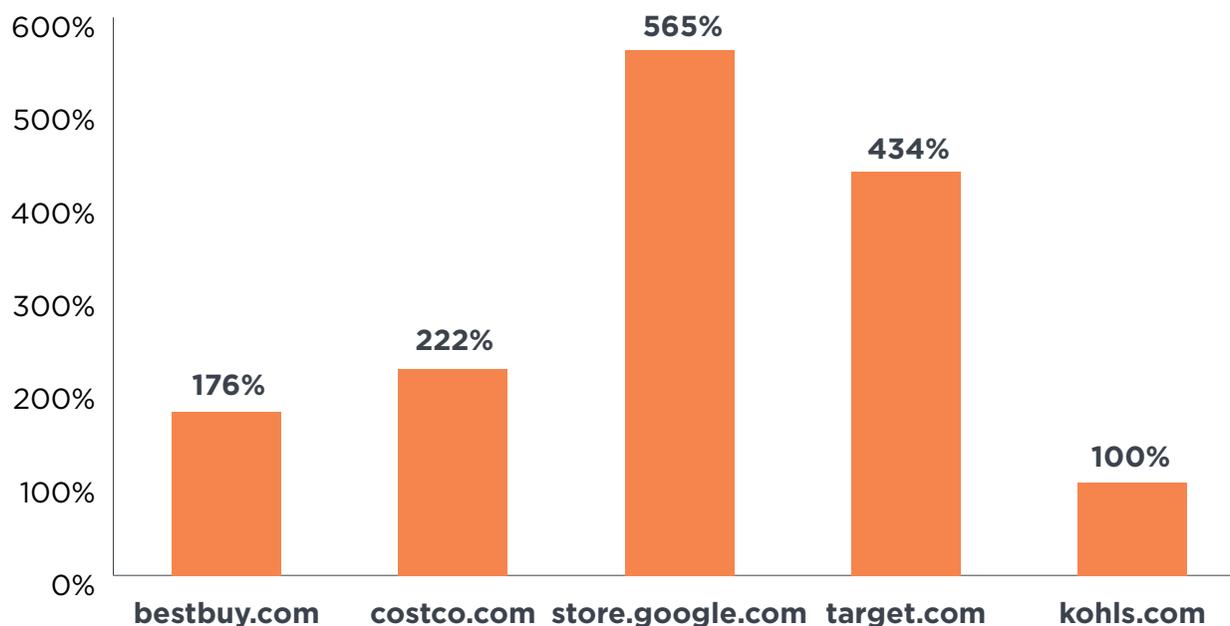
In the past year, nine out of the ten search terms that led to a smart doorbell purchase were brand and product specific, indicating that shoppers knew what they were looking for from the beginning of their search.

Not only is the Ring brand the #1 search term, but it dominates the top ten list by appearing seven times, indicating very high brand awareness. Consumers are not only searching for the brand specifically, but for its various products as well, showing that they are in-tune with what the brand has launched to the market.

Column Definitions

- Sales Share:** each brand's share of total category sales
- Dollars Spent Growth:** year-over-year growth in dollars spent
- Search Driven Conversion:** measures each brand's success in converting on-site searches into sales
- Branded Search Conversion:** measures each brand's success in converting on-site branded searches into sales
- Avg # of Brand Considered:** measures the average number of brands a consumer considered before purchasing a product from a particular brand
- Percent Winning Sessions:** measures each brand's success in winning sales when consumers also consider rival brands

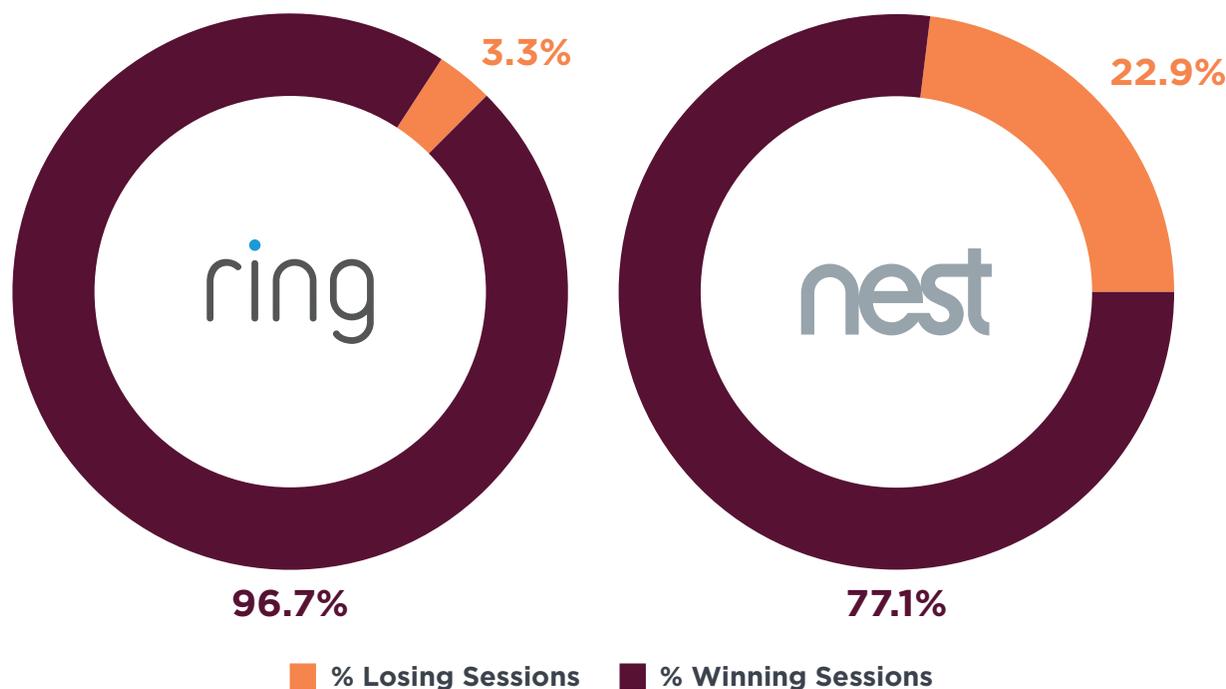
2 Nest's YOY Growth in Sales Dollars



Naturally, DTC sites such as amazon.com and store.google.com are the websites consumers mainly purchase their Ring (Amazon) and Nest (Google) smart doorbells from.

Nest's growth can be attributed to its sales on its DTC site, store.google.com, which experienced 565% growth in the last year. Other key retailers contributing to the brand's growth are target.com, costco.com, bestbuy.com, and kohls.com.

3 Brand Win/Loss Analysis



Thanks to its strong brand equity in the category, Ring video doorbells are almost unbeatable when included in a shopper's consideration set, winning 97% of the time.

Nest, by comparison, wins only 77% of the sessions it's considered in, and consumers shopping for a Nest are apt to consider a higher number of rivals brands. Taken together, this signals Nest still has work to do to establish itself beyond its home thermostat roots.

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