



Global E-Commerce Intelligence
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SAMPLE REPORT

**COVID-19 IMPACT ON GLOBAL B2C E-COMMERCE AND
ONLINE PAYMENTS 2020**

PUBLICATION DATE: APRIL 2020

PREFACE

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A LIST OF ADVANTAGES

- yStats.com provides secondary market research: By using various sources of information we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- Only reliable sources such as national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries and news portals are used as a basis for the analyses, statistical reports and forecasts.
- Our international employees research and filter all sources and translate relevant information into English. This ensures that the content of the original studies is correctly interpreted.
- yStats.com delivers all research results as PowerPoint files. All data can therefore be used directly for board presentations or be individually adapted.
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DEFINITIONS

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The following expressions and definitions are used in this market report*:

- **COVID-19 / CORONAVIRUS** An infectious disease triggered by an intense acute respiratory sickness. COVID-19 was first identified at the end of 2019 in Wuhan, China, and spread worldwide, becoming known as the coronavirus pandemic.
- **B2C E-COMMERCE** the sale of products (and services) through electronic transactions via the Internet from businesses to consumers (B2C). A broader definition of retail E-Commerce applied by some sources also includes consumer-to-consumer (C2C) sales.
- **E-COMMERCE SALES** the total sales generated either on the E-Commerce market in a certain country or region, or the total sales generated through E-Commerce by a player on the market.
- **INTERNET USERS** the total number of inhabitants in a certain country that regularly accesses the Internet.
- **ONLINE SHOPPERS** the total number of inhabitants in a certain country or region that participates in B2C E-Commerce.
- **ONLINE TRAVEL** the sale of goods (and services) directly to consumers in other countries, with orders delivered from the country where the foreign shop is based or from a central logistics facility, i.e. across the country's borders.
- **ONLINE PAYMENT** Transfer of money made over the Internet following a consumer's payment command, includes payments for product and service purchased in B2C E-Commerce and M-Commerce.
- **CONTACTLESS PAYMENT** Near Field Communication is a set of standards to create radio communication by bringing devices close together or having them touch each other. In that way, contactless data exchange and contactless payment transactions using an NFC-enabled smartphone or other mobile device can take place. Similarly, contactless payments can be made by credit and debit cards enabled with the contactless technology.
- **E-WALLET/DIGITAL WALLET** A prepaid digital account, allowing users to store money and use it in online or mobile transactions. The examples of E-Wallets or digital wallets include Alipay and PayPal.
- **ONLINE TRAVEL SALES** the sales of leisure and unmanaged business travel services (e.g. transportation tickets, accommodation, holiday tours) transacted online; usually refers to gross online travel bookings.

Note: *the definitions used by the original sources might differ from the ones stated on this chart; the exact definition used by each source, where available, is included on the respective charts

GENERAL METHODOLOGY OF MARKET REPORTS

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Secondary Market Research

- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for reported data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

Definitions

- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

Chart Types

- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

Report Structure

- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

Notes and Currency Values

- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
- When providing information about amounts of money, local currencies are most often used. When referencing currency values in the Action Title, the EUR values are also provided in brackets. The conversions are made using the average currency exchange rate for the respective time period. Should the currency figure be in the future, the average exchange rate of the past 12 months is used.

METHODOLOGY OF THE CURRENT REPORT



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Report Coverage

- The report covers the impact of the coronavirus (COVID-19) pandemic on B2C E-Commerce and online payments worldwide. The report focuses on the present effect and future implications and trends.
- All major global regions were covered in this report, with data availability ranging by region and country.

Report Structure

- A global chapter opens the report summarizing the effects of COVID-19 on global B2C E-Commerce, online payments, and selected digital verticals - online travel and online food delivery. The two verticals were selected to exemplify the negative and positive implications for the respective industries.
- The rest of the report is divided by regions. The regions are presented in the descending order of B2C E-Commerce sales. In each region, regional information is included first, followed by country chapters, where available.
- Depending on data availability, the following types of information were included: data concerning the increase or decrease in online sales and orders (total or for selected product categories, such as FMCG); consumer surveys indicating a shift in consumer shopping behavior due to the outbreak of COVID-19 or its consequences such as lockdowns and quarantine regimes; retailer and E-Commerce merchant surveys concerning the impact of the coronavirus on their businesses.

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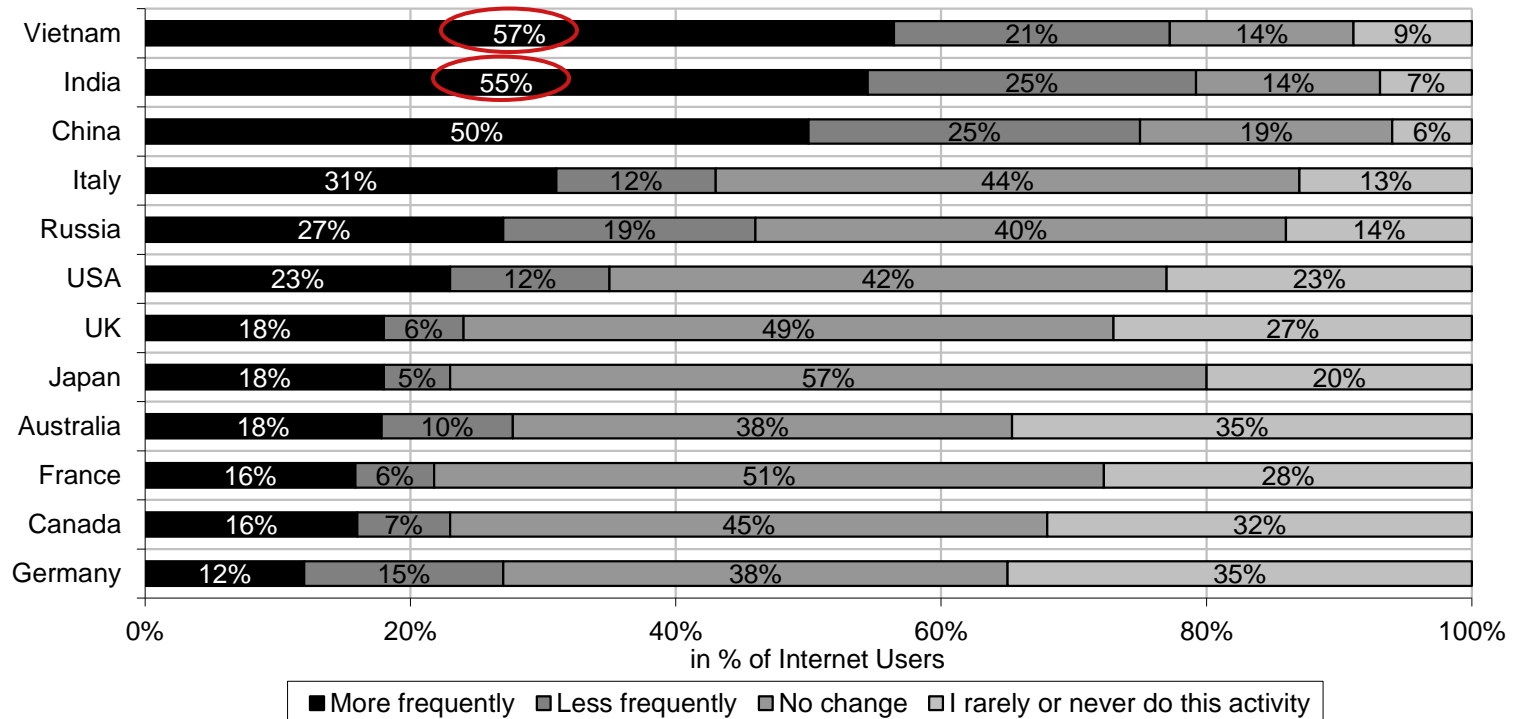
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Over 50% of Internet users in Vietnam and India used E-Comm. more frequently in March 2020 to buy goods they would normally get in-store.

Global: Breakdown of Perceived Changes in Frequency of Buying Products Online That Were Normally Bought In-Store, in % of Internet Users, March 2020 vs. February 2020



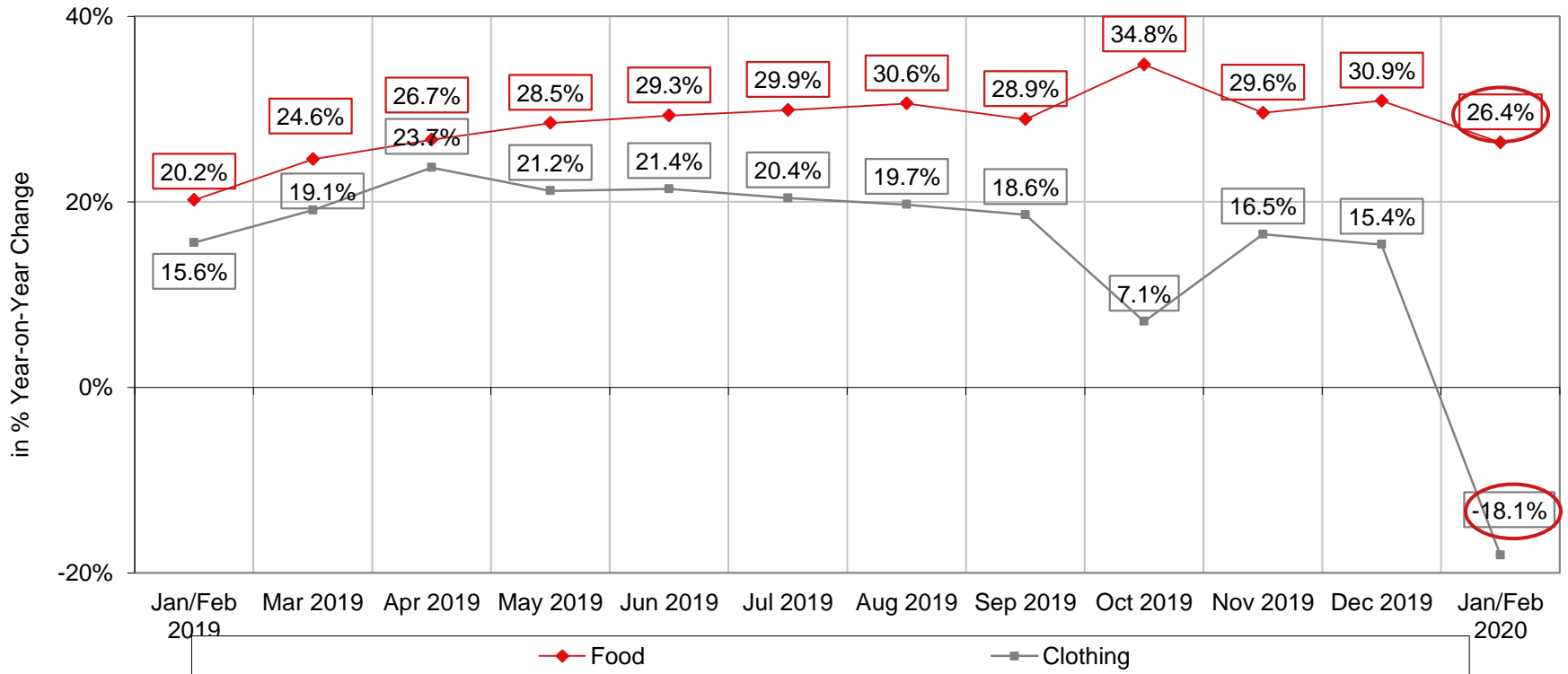
Note: may not add up to 100% due to rounding

Survey: based on a survey of 10,000 Internet users (approx. 1,000 from each country) aged 18-74 in Canada and the US and 16-74 in Australia, China, France, Germany, Italy, India, Japan, Russia, Vietnam and the UK, conducted from March 12th to 14th, 2020; question asked: "What about each of the following, would you say are doing each of the following more frequently or less frequently compared to one month ago? - Using e-commerce to purchase products you would normally buy in-store"

Source: Ipsos, March 2020

E-Commerce sales of food in China increased by +26% in Jan/Feb 2020, while online clothing sales fell by -18.1%.

China: Year-on-Year Change in E-Commerce Sales of Food and Clothing, January/ February 2019 – January/February 2020



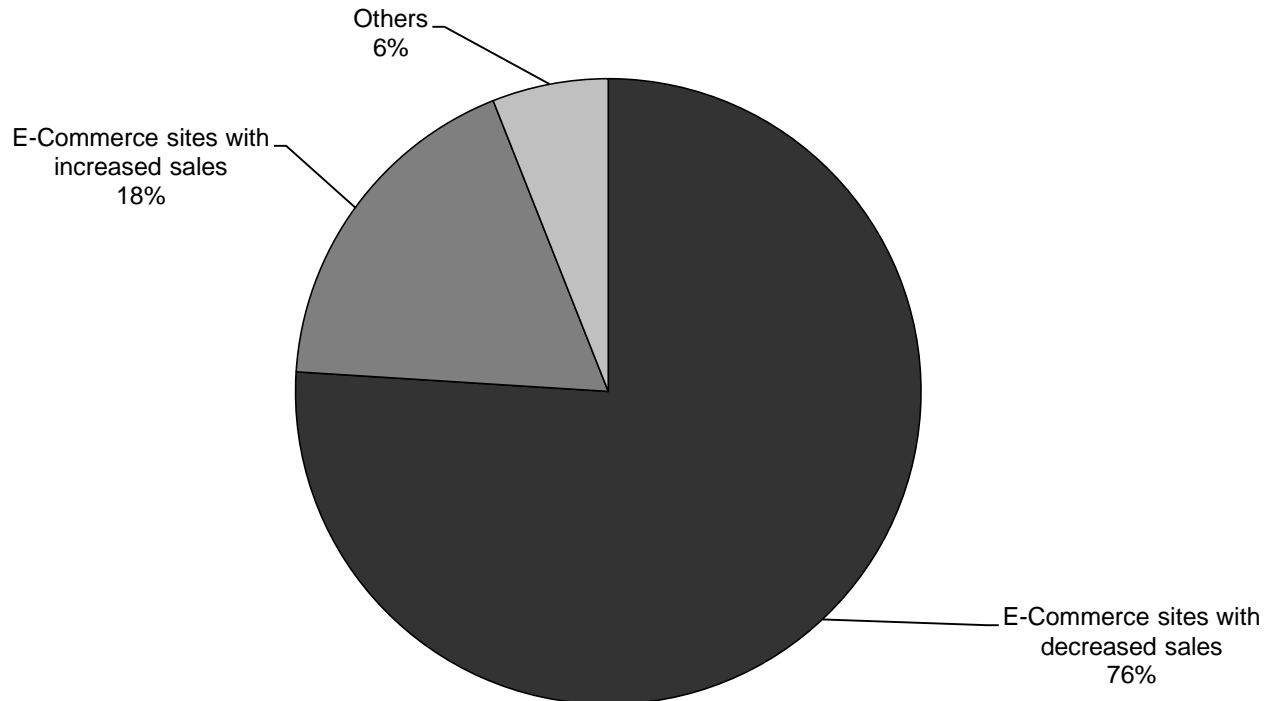
Note: the data from January to February of each year are released together in order to eliminate the influence of the uncertain factors of the Spring Festival date and improve comparability

Definition: total retail sales and online retail sales include sales of physical consumer goods only

Source: National Bureau of Statistics, March 2020

Coronavirus had a negative impact on sales of 76% of France's E-Commerce sites, while 18% were affected positively in March 2020.

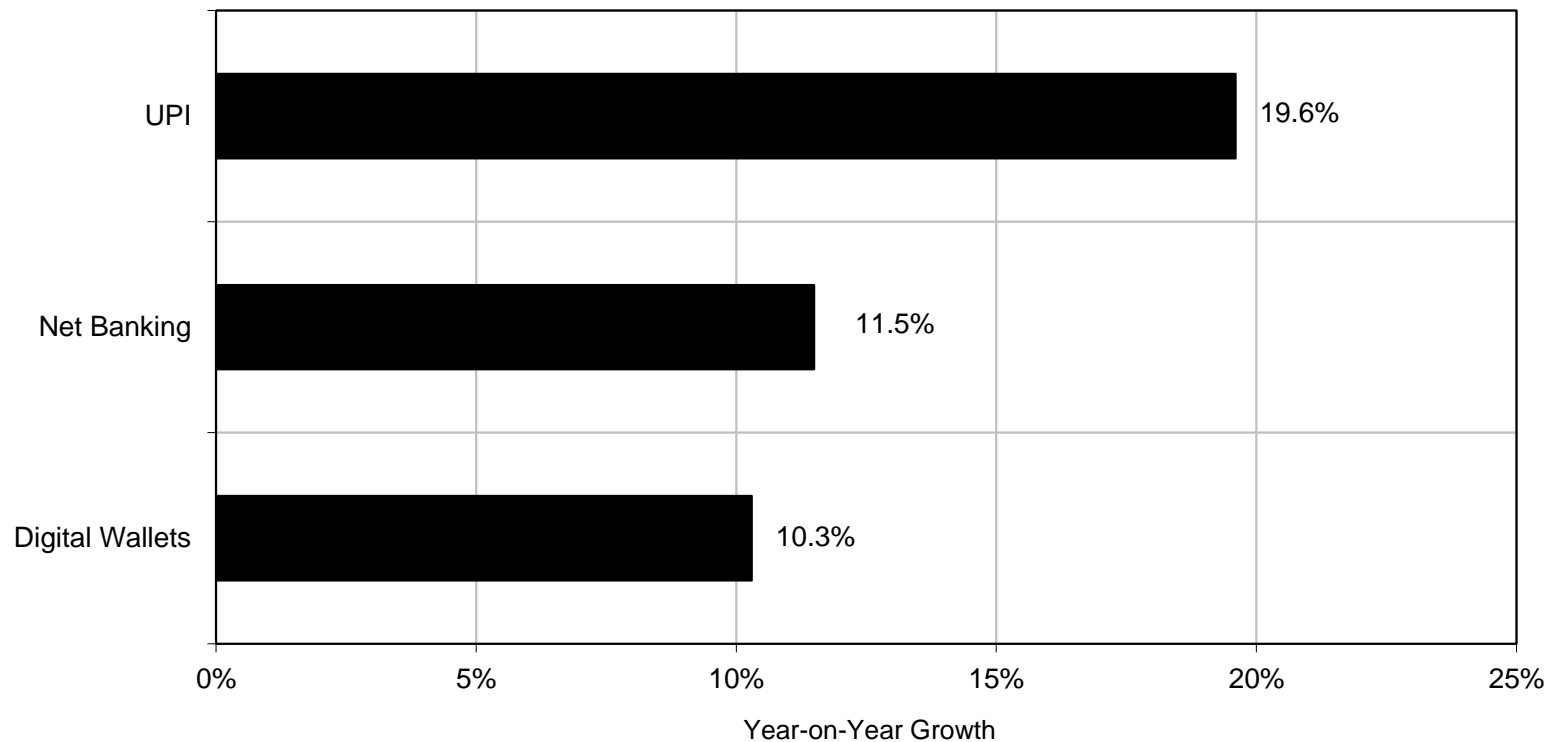
France: Share of E-Commerce Websites With Increased or Decreased Sales Due to COVID-19, in %, March 2020



Note: *according to the source, one in two E-Commerce websites stated the decrease was by more than 50%; **the sectors with the higher increase were food, computers and cultural/educational products
Survey: based on a survey of stakeholders (B2C, B2B, and C2C) of 136 E-Commerce sites, conducted between 23 and 25 March 2020
Source: Fevad, March 2020

The fastest growing digital payment channels in India amidst the COVID-19 outbreak in Feb/Mar 2020 were UPI, Net Banking and Wallets.

India: Top Three Digital Payment Channels by Year-on-Year Growth During Coronavirus Outbreak, in %, February/March 2020

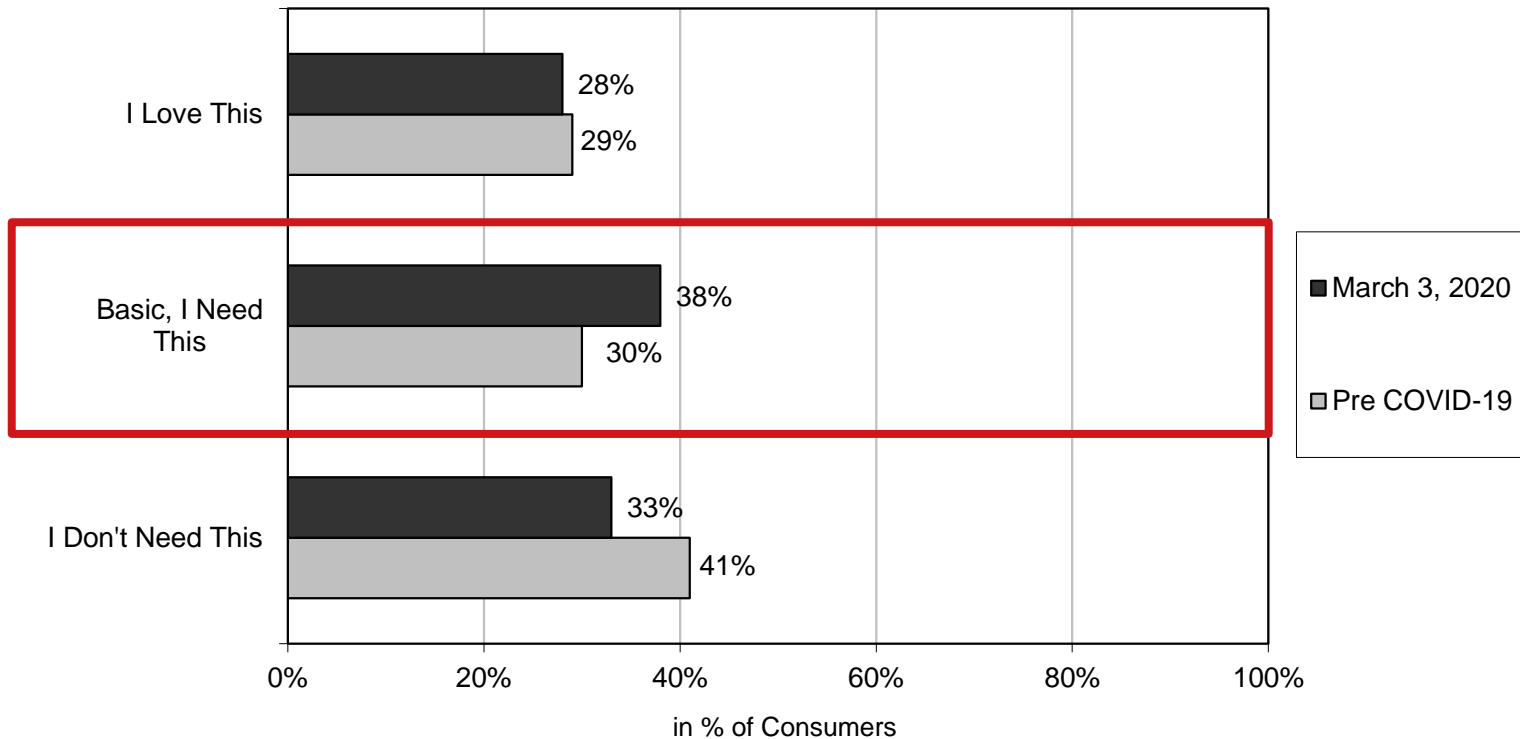


Note: based on the data on transactions processed by Razorpay

Source: Razorpay cited by the Economic Times, March 2020

The share of U.S. consumers seeing contactless as a basic and needed credit card feature increased from 30% pre COVID-19 to 38% in 2020.

USA: Perceived Importance of the Contactless Feature in Credit Cards, in % of Consumers, by Pre COVID-19 and on March 3, 2020



Note: may not add up to 100% due to rounding
 Survey: based on a survey of 3,187 consumers
 Source: Pi-360, The Futurist Group, March 2020



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