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**SAMPLE REPORT**  
**NORTH AMERICA B2C E-COMMERCE AND PAYMENT  
MARKET 2020 & COVID-19'S IMPACT**

PUBLICATION DATE: JUNE 2020

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# 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 in North America, including Canada and the USA.

## **Report Structure**

- A global chapter opens the report summarizing the effects of COVID-19 on global B2C E-Commerce, B2B E-Commerce, digital payments, and selected online verticals - travel, airlines, food delivery, fashion, luxury, education, and gaming.
- 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.
- The report starts with an overview of the regional E-Commerce market and international comparisons in terms of criteria relevant to B2C E-Commerce, such as sales, E-Commerce sales. The rest of the report is divided into country chapters, presented in the descending order of retail E-Commerce sales.
- Each country description starts with an overview of the market, highlighting the overall impact of COVID-19 on B2C E-Commerce development in the respective countries. Next, the “Sales & Shares” section covers the development of B2C E-Commerce and total retail sales during the outbreak, and contains forecasts for post-COVID-19 B2C E-Commerce sales growth. In the “Users & Shoppers” section, information about the pandemic’s impact on online shoppers’ behavior, such as changes in frequency of buying online compared to in-store. Afterwards, the section “Products & Verticals” shows the leading product categories purchased online during the pandemic and COVID-19’s impact on selected online verticals such as travel, fashion, gaming, streaming, and food delivery. The “Trends” section highlights the implications of the outbreak on the development of online shopping trends, such as M-Commerce, omnichannel, and cross-border. The next section, “Payment”, covers the payment methods most used by online shoppers when buying during the outbreak, and the impact of the pandemic on online and mobile payments. Furthermore, the “Delivery” section covers information related to delivery in B2C E-Commerce and its development during COVID-19. Finally, the “Players” section includes information about the impact of the Coronavirus on the leading B2C E-Commerce companies.
- Due to varying data availability, not all the mentioned topics were included for each of the countries covered.

# 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.
- **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.
- **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.
- **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.
- **CONTACTLESS DELIVERY** A method of delivery where the parcel is left outside the door or dropped off at a specified location on the premises to avoid person-to-person contact when handing in the item.
- **BUY ONLINE PICK-UP IN STORE (BOPIS)** An omnichannel service allowing customers to order items online and have them delivered to a store outlet for pickup.

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

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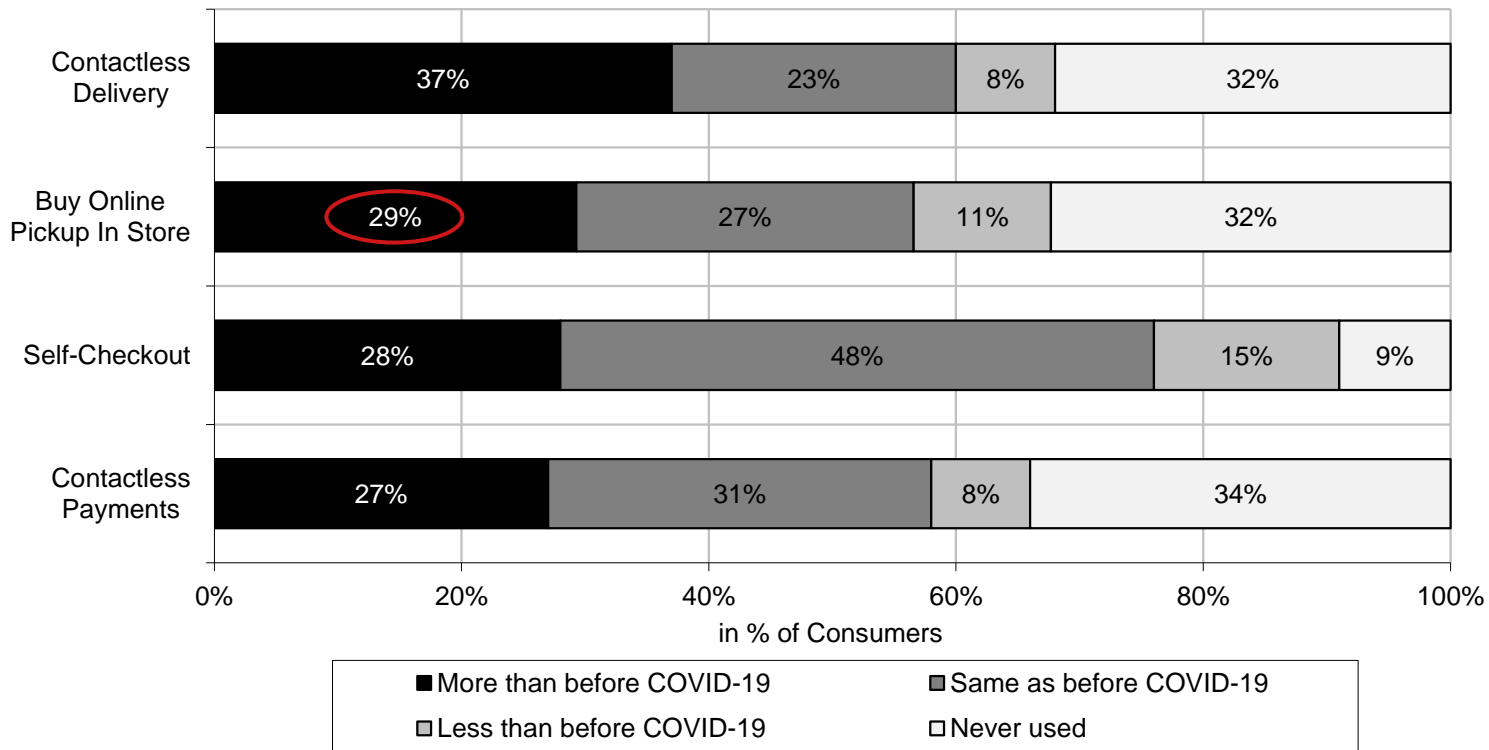
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## 29% of consumers in the U.S. used “Buy Online Pickup In Store” more since COVID-19 outbreak, according to a survey from May 2020.

USA: Change in Usage of Selected Omnichannel and Contactless Shopping Methods Since COVID-19, in % of Consumers, May 2020



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

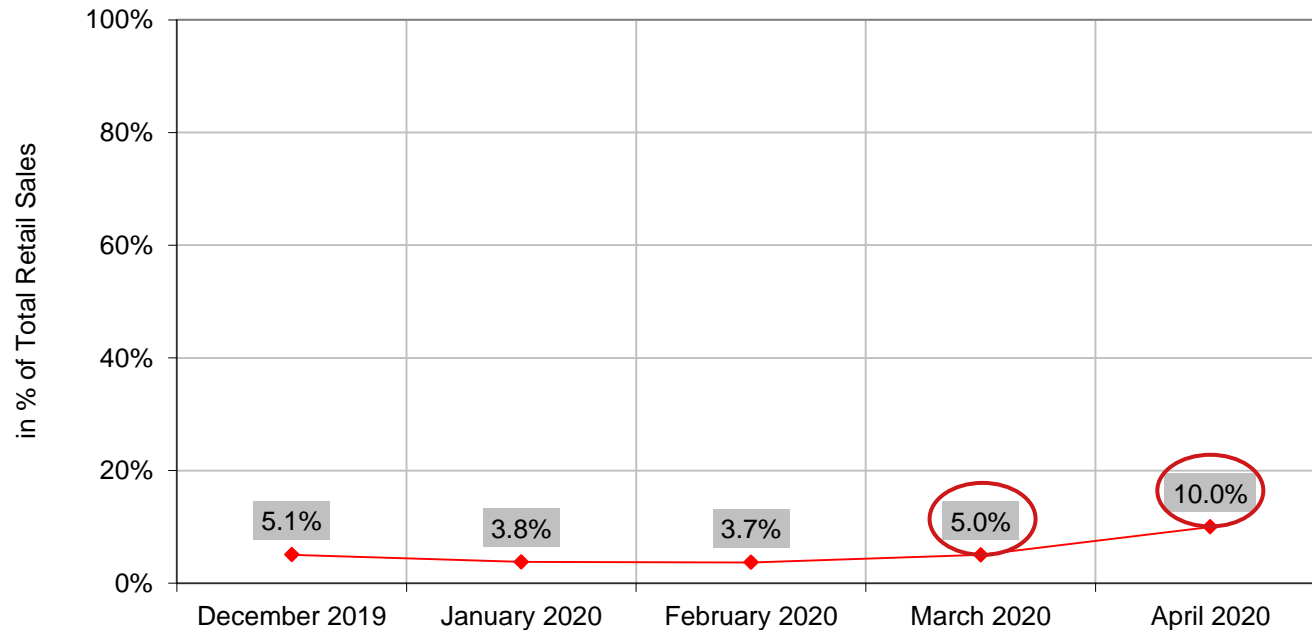
Survey: based on a survey of 3,558 respondents in the USA, UK, France, Germany, Brazil, and Australia, conducted between May 14 and 15, 2020; the data is weighted to represent the general population

Source: Salesforce, May 2020



## E-Commerce's share of retail sales in Canada doubled from 5% in March 2020 to 10% in April 2020.

Canada: E-Commerce Share of Total Retail Sales, in %, December 2019 - April 2020



**Note:** non-seasonally-unadjusted data; the data quality indicator for individual months range from “Very Good” to “Excellent”; percentage shares were calculated from the sales values reported by the source for “Retail trade” and “Retail E-Commerce sales”

**Definition:** retail E-Commerce includes e-sales from both store retailers and non-store retailers included in electronic shopping and mail order houses; online sales made by Canadian retailers only are included, purchases made by Canadian consumers from foreign-based retailers are excluded. Also excludes hotel accommodation, travel services and airline tickets, ticket sales, registrations to programs or events, bill payments, license renewals, banking.

**Survey:** based on a monthly retail trade survey; the respondents were asked whether or not a portion of their monthly sales was made via the Internet, and if yes, how much expressed in either percentage or dollar terms; electronic shopping and mail order houses were included in the survey

**Source:** Statistics Canada, June 2020



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