

Retail in Transition: Future E-commerce Opportunities in North America

July 2021

Table of Contents

INTRODUCTION

About the report

Key findings

E-COMMERCE EMERGES AS THE DEFAULT SETTING

In 2020, North America passes Asia Pacific in share of goods bought online

Growth in North America driven by pandemic-induced shifts in behaviour

Case study: Amazon cements its status as the “everything store”

Category spotlight: Food and drink e-commerce comes into its own

Case study: Instacart emerges as an indispensable service provider

HOW SHOPPING BEHAVIOURS CONTINUE TO EVOLVE

E-commerce gains ground across every product category in 2020

Gains in m-commerce users more subdued than e-commerce as a whole

Consumer spotlight: Younger consumers are leading the digital shift

Shopping behaviours also evolve in other ways as a result of the crisis

Trend: Ubiquitous kerbside pick-up will be a legacy of the pandemic

Case study: Loblaw profits by expanding kerbside pick-up service

IDENTIFYING E-COMMERCE GROWTH OPPORTUNITIES

Identifying the markets most primed for sustained e-commerce growth

E-commerce growth possible through optimisation rather than expansion

Consumer electronics appears ripe for e-commerce sales growth

Mobile phones category accounts for a third of unmet potential in the US

Case study: Best Buy makes decisive pivots to capture more online spend

North American e-commerce sales set to grow by USD566 million by 2025

Apparel and fashion to drive projected e-commerce sales growth

Case study: Nordstrom makes digital strides but faces an uncertain future

HOW TO WIN IN NORTH AMERICA

Key opportunities

Key challenges still to overcome

Key takeaways about e-commerce in North America

Recommendations for how to win in retail’s digital-first era

What to consider when evaluating your e-commerce strategy

Learn more about how to win in the digital-first era

APPENDIX

About the survey methodologies

About the E-Commerce Readiness Model

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world’s most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/retail-in-transition-future-e-commerce-opportunities-in-north-america/report.