INTRODUCTION

About the report
Key findings

THE DIGITAL REVOLUTION IN RETAIL

The Digital Revolution in Retail
Digital revolution has led to a more fragmented retail sector
COVID-19 accelerated the retail sector’s digital transformation
COVID-19 has accelerated the development of several retail trends
The key retail trend fuelled by the crisis was the e-commerce boom

E-COMMERCE EMERGES AS THE DEFAULT SETTING

E-Commerce Emerges as the Default Setting
COVID-19 drove radical change in the e-commerce marketplace
Digital growth in 2020 carried by the most sophisticated online markets
Category spotlight: online grocery reaches historic heights in 2020
Case study: Walmart’s US e-commerce business makes dramatic gains
E-commerce transformation is likely to be global and permanent
Case study: Shopee teaches its sellers how to hawk through livestreams
More developed e-commerce markets were better able to handle surge
Crisis-driven tech investment related to improving online experience

HOW SHOPPING BEHAVIOURS CONTINUE TO EVOLVE

How Shopping Behaviours Continue to Evolve
E-commerce posted a double-digit percentage point increase during crisis
Consumers purchased across more categories at the height of the crisis
Consumer spotlight: younger consumers continue to drive digital shift
Consumers turned to mobile more for purchases during COVID-19
Shopping behaviours also evolved in other ways as a result of the crisis
Trend: going virtual will continue to supercharge the online experience
Trend: livestreaming emerges as a tool for engaging shoppers in real time
Case study: Alibaba’s live selling platform surges during COVID-19 crisis
Trend: last mile faces its day of reckoning as e-commerce skyrockets
Case study: Ohi uses nano-fulfilment centres to get items closer to homes

IDENTIFYING E-COMMERCE GROWTH OPPORTUNITIES

Identifying E-commerce Growth Opportunities
Identifying the markets best placed for sustained e-commerce growth
E-commerce growth possible through optimisation rather than expansion
Leading e-com markets China and US have the greatest unmet potential
Case study: Best Buy makes decisive pivots to capture more online spend
Fresh food accounts for more than half of unmet opportunity in China
Case study: F reshippo was positioned to capitalise on the digital surge
Mobile phone category accounts for a third of unmet potential in the US
E-commerce market is expected to expand by USD1 trillion by 2025
Regional spotlight: Latin America emerges as e-commerce growth story
Apparel and food to drive e-commerce opportunities at category level
Brands must ensure they have the right positioning and assortment

HOW TO WIN IN THE DIGITAL-FIRST ERA

How to Win in the Digital-First Era
Digital has changed the rules of the game for those in the retail sector
Brands have been giving a harder look at new channels, business models
Marketplace business model is outpacing traditional wholesale model
Case study: Nike’s shift away from wholesale paid off during COVID-19
Case study: PepsiCo launches direct-to-consumer sites within a month
Retailers pursue new business models to capture and retain consumers
The retail sector also faces other challenges as e-commerce expands
Where retail should make tech investments to support digital growth
Why retailers and consumer brands must invest in technology

HOW TO WIN IN THE DIGITAL-FIRST ERA
Recommendations for how to win in retail’s digital-first era
What to consider when evaluating your e-commerce strategy

APPENDIX
About the Digital Consumer Survey and Voice of the Industry: Digital Survey
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-capitalising-on-future-e-commerce-opportunities/report](http://www.euromonitor.com/retail-in-transition-capitalising-on-future-e-commerce-opportunities/report).