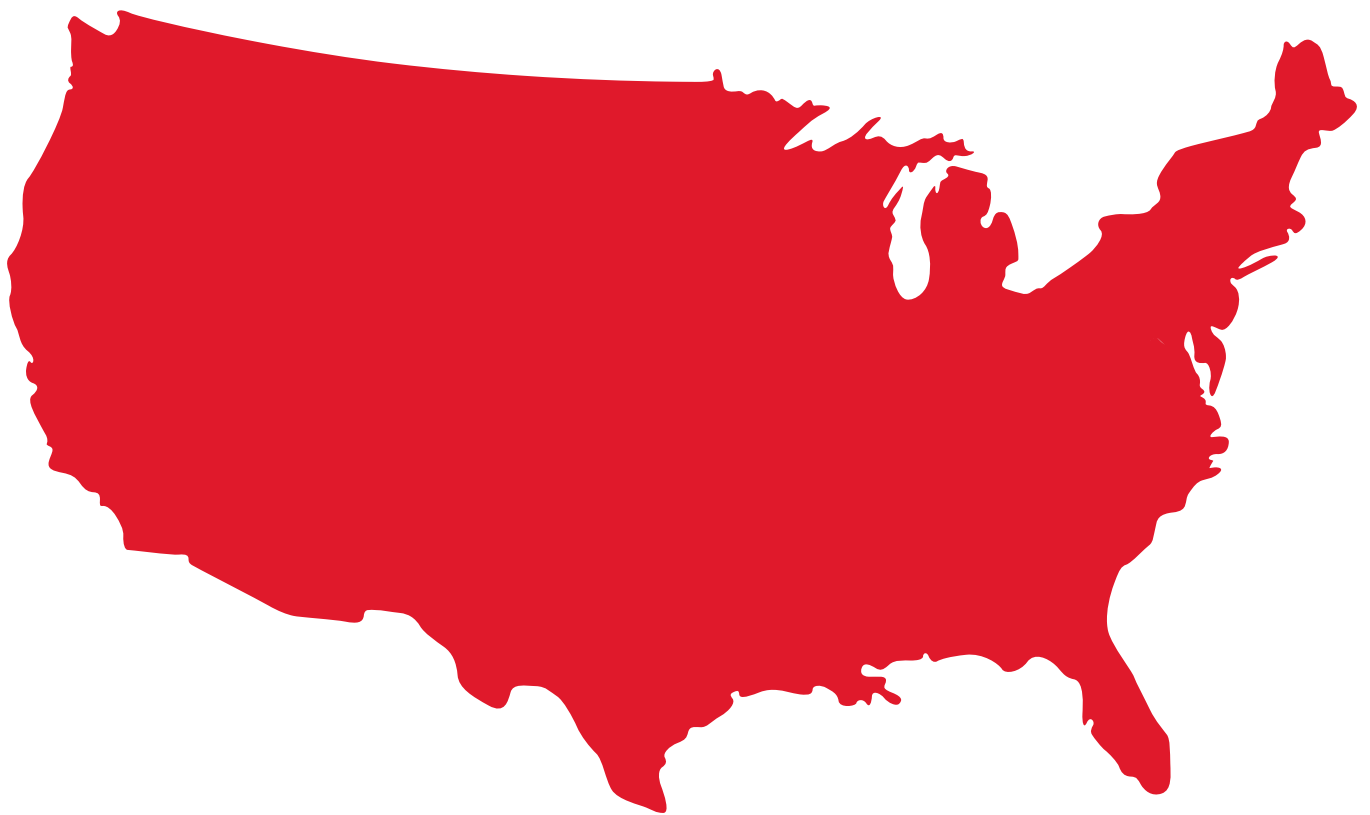


Country factsheet - October 2015

The United States



landmark global

a bpost company

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Introduction

E-commerce keeps growing in the United States. In 2014, online sales topped \$304 billion, up 15.4% from 2013.

U.S. retail e-commerce sales are expected to hit \$347 billion in 2015, with projected growth to \$491 billion by 2018. In the first quarter of 2014, 198 million U.S. consumers shopped online. That's 78% of the U.S. population age 15 and over.

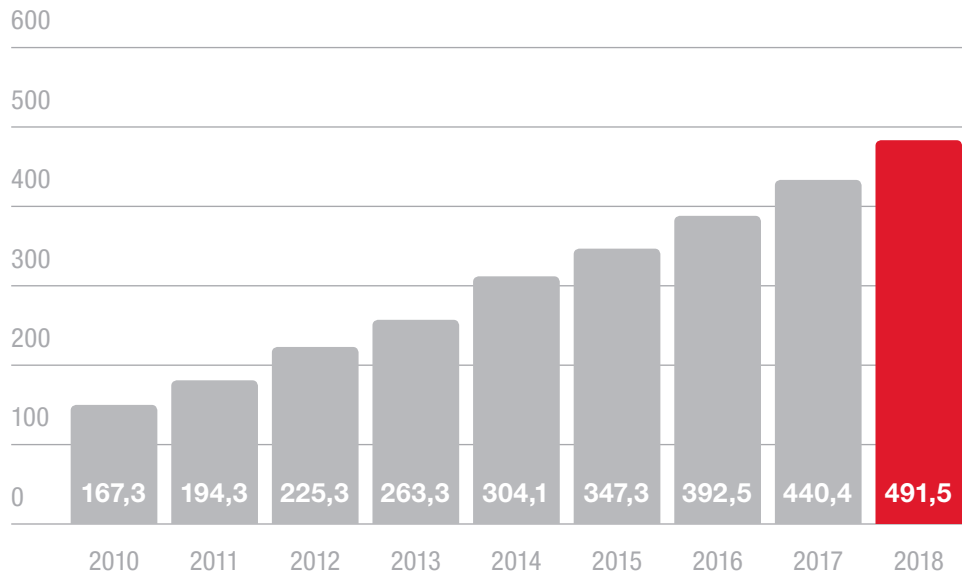
Boomers and seniors
have embraced
mobile commerce

Millennials – 18-34 year olds – remain the most important consumers on the e-commerce market, spending more online than any other age group. On average, they spend \$2,000 annually online, despite having lower incomes than older adults.

Boomers and seniors have embraced m-commerce. The over 55s account for one in four mobile shoppers in the U.S., and about the same share of the overall U.S. population.

U.S. retail e-commerce sales

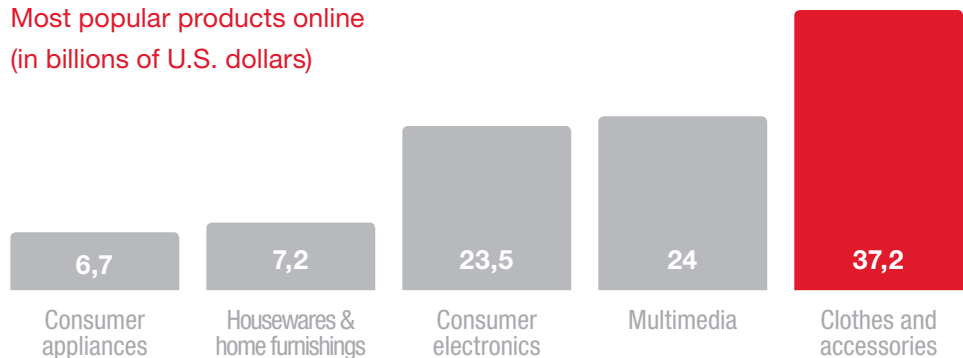
Revenue in billions of U.S. dollars



What do U.S. e-shoppers buy?

The trend in Europe and elsewhere is also apparent in the U.S.: physical goods dominate the e-commerce market, as opposed to non-physical goods like software and plane tickets. Clothes and accessories, multimedia and consumer electronics are the most popular products online.

Most popular products online
(in billions of U.S. dollars)

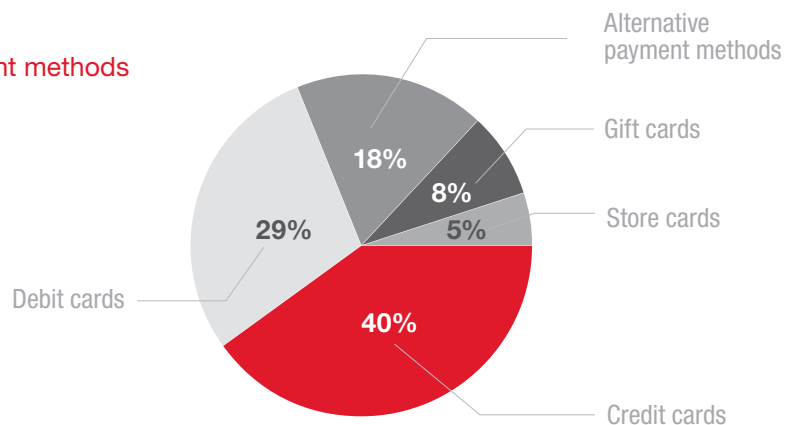


Preferred payment methods

40% of Americans use their credit cards to pay for everything.

If you think Americans like their credit cards, you're on the money! A stunning 40% of Americans take out their credit cards to pay for everything. Debit cards are a little less popular, with 29% of U.S. citizens preferring this payment option. While alternative payment methods (like Google Wallet, PayPal and Bitcoin) are booming in Europe and some other parts of the world, Americans don't much care for them; only 18% use these alternative payment methods when shopping online. And prepaid cards and gift cards (8%), and store cards (5%) are right at the bottom of the list.

Preferred payment methods in the U.S.



Cross-border

The U.S. is one of **the biggest cross-border B2C e-commerce markets** with regard to both exports and imports, though estimated volumes differ greatly.

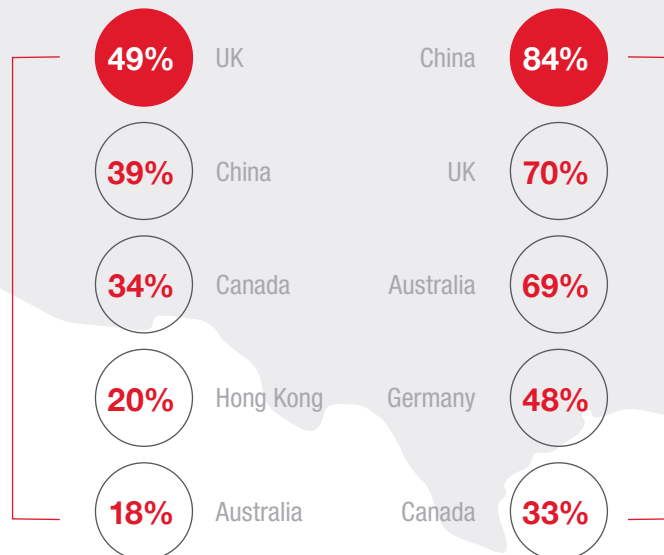
Research shows there are 34.1 million online cross-border shoppers, generating cross-border sales of \$40.1 billion in 2013. **That figure is expected to rise to \$80.2 billion by 2018.**

Clothes and accessories top the list of cross-border purchases in the U.S., followed by health and beauty products.

The most intensive cross-border B2C e-commerce trade is between the U.S. and the U.K. **Language is the key driver** of cross-border B2C e-commerce in the U.S., for both exports and imports. For example, there are as many Spanish-speaking consumers in the U.S. as there are in Spain, while there are 100 million native English speakers outside the U.S., in countries like the U.K., Canada, Australia, New Zealand and elsewhere. And that's without considering the large number of non-native English speakers.

The U.S. is one of the biggest cross-border B2C e-commerce markets.

U.S. online consumers buy from



U.S. online merchants sell to

But language is not everything. More than a third (39%) of cross-border online shoppers in the U.S. buy from China, the second most popular offshore destination for online shopping after the U.K.

Over half of online merchants in the U.S. sell to online shoppers outside the domestic market. Many of them focus on Europe.

U.S.-based online merchants account for 22% of total B2C e-commerce sales in Europe, with Amazon.com as the leading online pure play in the region.

Importance of social media

The top 500 retailers earned \$3.3 billion from social shopping in 2014, up 26% from 2013.

The U.S. market shares certain characteristics with other mature markets, such as the well-established role of social media in the buying process.

While social media may drive only a small share of total online retail sales, its impact cannot be ignored. Social-driven retail sales and referral traffic are rising at a faster pace than all other online channels combined.

The top 500 retailers earned \$3.3 billion from social shopping in 2014, up 26% from 2013. That far outstrips the 16% growth on the total e-commerce market in the U.S.

Holiday peaks

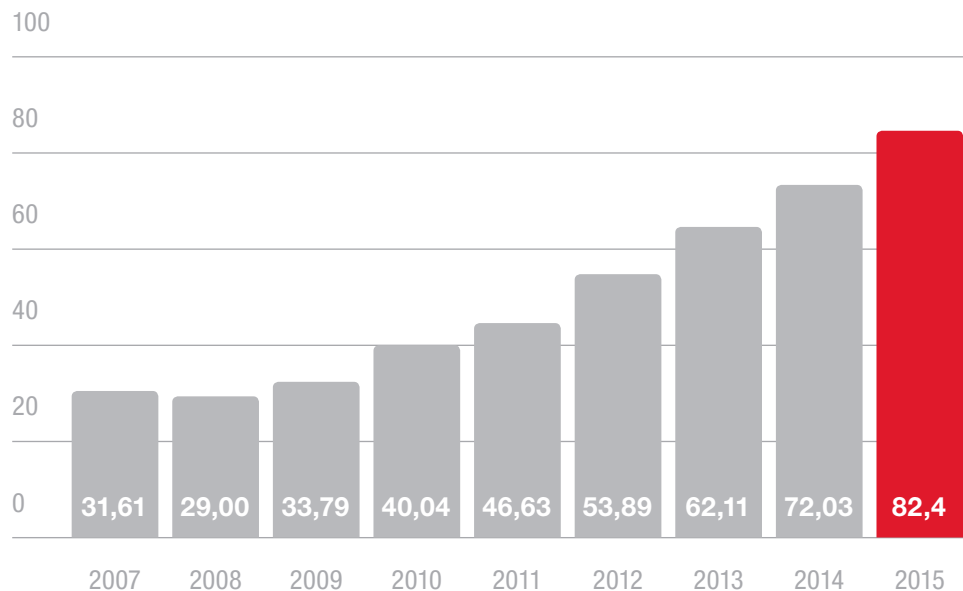
Black Friday is a unique and very characteristics U.S. concept.

Looking at U.S. e-commerce in more detail, it becomes clear that almost one quarter of annual sales is generated in the last two months of the year. There's even a special category of seasonal e-shoppers, known as "holiday shoppers", who only buy during the holiday season.

In 2014, the days with the biggest year-over-year gains in e-commerce spending were **Thanksgiving Day** (32%) and **Black Friday** (26%), while Cyber Monday saw a smaller gain of 17%. Black Friday is the day after Thanksgiving Day and **Cyber Monday** is the Monday after the Thanksgiving holiday.

In 2015, projected retail e-commerce revenue during the holiday season is \$82.4 billion, a 14.4% increase on the previous year.

Revenue in billions of U.S. dollars



Market of *pure players*

In 2014, wholesalers reduced the gap with Amazon, but the *pure players* generated the biggest profit.

The 500 biggest U.S. online stores saw sales grow by 15.7% in 2014 to \$296.51 billion, from \$255.61 billion in 2013.

The American e-commerce top 50 is dominated by Amazon, which generates \$79.5 billion in revenue, and includes two more *pure players*, 23 physical retail chains, eight catalog sales companies and six brands.

Top 10 U.S. e-commerce players



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