

A person stands on a rocky peak at sunset, looking up at a starry night sky. The scene is a composite of a sunset landscape and a starry night sky.

# THE FUTURE SHOPPER REPORT 2021

A deep dive into 17 international markets and 28,000+ consumers to uncover how the global online shopper is shaping the future of commerce and how businesses need to respond to win online.

+ WUNDERMAN  
THOMPSON

US, Europe, APAC, LATAM & UAE

## INTRODUCTION

When we launched our Future Shopper 2020 report, the world was just starting to feel the effects of COVID-19 and subsequent lockdowns. One year on, the world is still grappling with the virus, and while some countries edge back towards normality, others are still faced with huge challenges.

But what is clear is that, when we look back at the last year, we can see how the way we shop has changed. It hasn't always been our own choice, but the COVID-19 pandemic has supercharged online shopping, with businesses who were unable, or unwilling to change being brought to their knees, and those who responded by giving consumers what they want, reaping the rewards.

In this tumultuous year, we've seen marketplaces strengthen their positions, an abundance of D2C offerings popping up, advances in social commerce, and the rise of the aggregators.

At Wunderman Thompson Commerce, we believe that forewarned is forearmed. In other words, it's vital that businesses know how consumers are shopping, and how they will shop in the future. Armed with these insights, effective and successful strategies can be formulated.

With this in mind, this year's Future Shopper delves deeper and wider than ever before, covering more than 28,000 consumers across 17 different markets. This has enabled us not only to form a picture of the global online shopper, but also to identify differences across geographies and demographics.

So without further ado, we present The Future Shopper 2021.



### HUGH FLETCHER

GLOBAL MARKETING DIRECTOR  
AND HEAD OF THOUGHT LEADERSHIP

## METHODOLOGY

Research for this report was conducted by independent research consultancy Censuswide. A total of 28,426 consumers who shop online at least once a month were interviewed between 26.03.2021 and 14.04.2021, across the following 17 regions:

- Europe: UK, Spain, France, Netherlands, Germany
- APAC: China, Japan, Thailand, Indonesia, Australia, India
- LATAM: Brazil, Argentina, Mexico, Colombia
- US
- UAE

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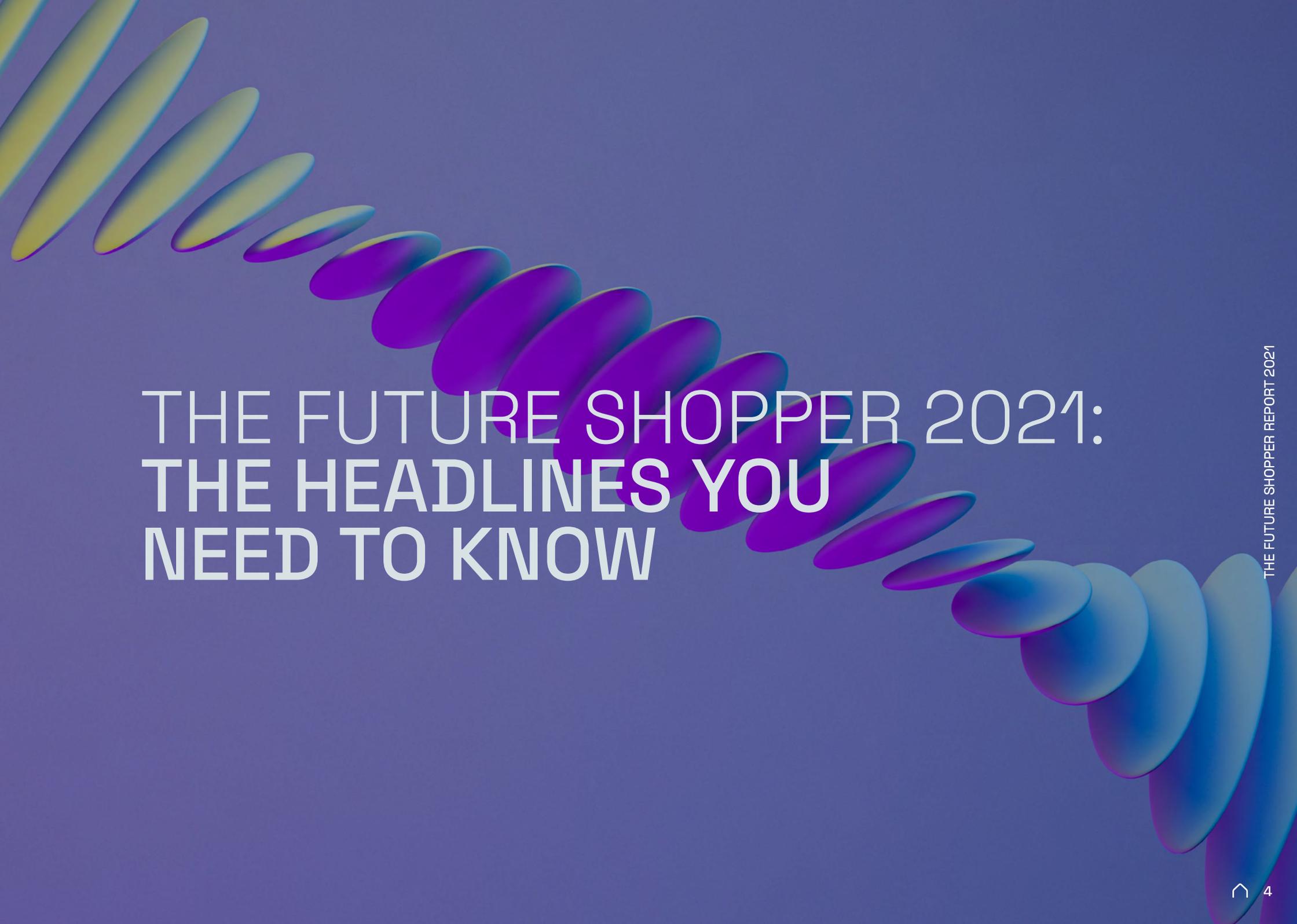
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# THE FUTURE SHOPPER 2021: THE HEADLINES YOU NEED TO KNOW

# THE FUTURE SHOPPER 2021

## THE HEADLINES YOU NEED TO KNOW

If you've only got the chance to scan the results, this is the page for you, presenting the standout findings from The Future Shopper 2021.



**IN A POST-LOCKDOWN AND POST-PANDEMIC WORLD, CONSUMER BUYING BEHAVIOR WILL HAVE CHANGED, WITH A MORE TECHNOLOGY-LITERATE SHOPPER BASE SPENDING MORE ONLINE.**

Is your online offering good enough to handle the increase in demand?



**INNOVATIVE, OMNI-CHANNEL SHOPPING EXPERIENCES ARE WHAT SHOPPERS CRAVE, AND THEY WILL NOT SHOP WITH BUSINESSES WHO DON'T MEET THEIR EXPECTATIONS.**

Do you know what your consumers expect? Is your offering omni-channel? And is your technology infrastructure set up to deliver the end-to-end experiences your customers crave?



**GLOBALLY, MARKETPLACES LEAD WHEN IT COMES TO ONLINE SHOPPING – THROUGH INSPIRATION, SEARCH AND TRANSACTION – AND THEY'RE SUCCESSFULLY DIVERSIFYING THEIR OFFER TO GAIN MORE TRACTION WITH CONSUMERS.**

Do you have a strategy in place for selling through marketplaces internationally?



**WITH MORE ONLINE COMMERCE, THE ROLE OF D2C IS BECOMING MORE IMPORTANT, BUT BUSINESSES OFFERING D2C MUST IMPROVE THEIR SERVICE, PARTICULARLY AROUND DELIVERY.**

Do you offer D2C? Is your business service-led and, is your delivery in-line with what your consumers expect?



**DIGITAL PRODUCTS THAT ARE INSTANTLY DOWNLOADABLE ARE BECOMING MORE DESIRABLE AND ADDRESS THE "FINAL MILE" CHALLENGES THAT COME WITH DELIVERING PHYSICAL PRODUCTS.**

Have you considered which of your products and services could be digitized, and how you could get them into the hands of your consumers quickly via downloads?



**THE APPETITE FOR SOCIAL COMMERCE IS GROWING AND IT WILL BECOME AN INCREASINGLY IMPORTANT ONLINE SALES CHANNEL.**

Do you have the skills inhouse to build out a powerful social media strategy that drives both engagement and conversion?



**ONLINE RETAILERS MUST CONSIDER THEIR ENVIRONMENTAL CREDENTIALS, WHICH ARE BECOMING MORE IMPORTANT FACTORS IN ONLINE PURCHASE DECISION-MAKING.**

Do you have a sustainability strategy, and do you communicate your environmental, ethical and moral actions?



**CONSUMERS ARE HUNGRY FOR DIGITALLY ADVANCED WAYS OF SHOPPING, AND BUSINESSES NEED TO THINK OUTSIDE THE BOX ABOUT HOW TO SELL IN AN OMNI-CHANNEL ENVIRONMENT WHICH INCLUDES VOICE, CONTACTLESS TECHNOLOGY AND EVEN GAMING.**

How up to speed are you with new technologies and with how your customers want to consume your products and services?



# THE FUTURE SHOPPER 2021: CONDENSED

# THE FUTURE SHOPPER 2021 CONDENSED

Our in-depth look into online behavior is exactly that; in-depth. Yet sometimes, although you may crave the detail, you just don't have enough time to read through the full extent of the report. So, here is a condensed breakdown of our findings and statistics:

## 01 ONLINE SAVED THE DAY DURING 2020 AND THE PANDEMIC:

**72%** of global shoppers said online shopping came to their rescue in 2020

## 02 ONLINE COMMERCE WILL KEEP ON RISING:

**73%** of global shoppers said eCommerce will be more important to them this year

**62%** of global shoppers will increase their use of digital shopping channels in the future

**51%** the percentage of spend that global shoppers say they will spend online in a post-COVID-19 world

## 03 THE PANDEMIC SUPERCHARGED GLOBAL COMFORT WITH TECHNOLOGY:

**60%** of global shoppers are more comfortable using digital technology in the wake of the pandemic

## 04 CUSTOMERS WANT TO GET FROM INSPIRATION TO PURCHASE AS QUICKLY AS POSSIBLE:

**80%** of global shoppers say that they want to get from product inspiration to purchase as quickly as possible. We call this "compressed commerce", where speed is of the essence

## 05 OMNI-CHANNEL IS THE FUTURE, BUT FEAR OF PHYSICAL SHOPPING IS REAL:

**64%** of global shoppers say they prefer to shop with brands that have both online and offline presence

**59%** of consumers said they wished brands would communicate seamlessly with them across all channels, both digital and physical

**41%** admit they are still frightened about shopping in-store in the wake of COVID-19

## 06 CONSUMER EXPECTATIONS ARE STILL NOT BEING MET:

**73%** say retailers need to get better at giving them the products, service and experience they expect

## 07 PRODUCTS SHOULD BE DIGITISED:

**46%** would prefer online purchases to be digital and instantly downloadable - a noticeable increase from 34% in 2020

**33%** of all products and services bought online are digital, and not physical.

## 08 GLOBALLY, AMAZON'S DOMINANCE OVER THE EARLY STAGES OF THE CUSTOMER JOURNEY IS CLEAR:

**38%** of global shoppers search for products on Amazon

**14%** of all online spend is via Amazon

**32%** of global online shoppers are Amazon Prime members

## 09 BUT THE NUMBER ONE CHANNEL FOR PURCHASING GLOBALLY IS MARKETPLACES IN GENERAL:

**42%** of all online spending globally is via marketplaces - such as Amazon, Alibaba, JD.com, Mercado Libre & eBay

## 10 CONSUMERS WELCOME THE OPPORTUNITY TO BUY EVERYTHING IN ONE PLACE:

**64%** of global shoppers say that they are excited by the prospect of buying everything through one retailer or marketplace

# THE FUTURE SHOPPER 2021 CONDENSED

**11** THE CHANNEL WITH THE HIGHEST FREQUENCY OF PURCHASING IS SUPERMARKETS / GROCERS DESPITE MANY CONSUMERS BEING RETICENT TO BUY GROCERIES ONLINE:

**6.87** times per month – the frequency that global shoppers spend online with supermarkets and grocers

**65%** of global shoppers said they would rather go to the supermarket or order their groceries online from a supermarket than Amazon, Mercado Libre or Lazada

**19%** of consumers never buy groceries online

**12** AMAZON IS DOING A GREAT JOB AT EXPANDING ITS OFFERING WHERE IT IS THE DOMINANT MARKETPLACE:

**39%** of global shoppers said they were impressed with Amazon Prime's coverage of sports

**53%** of global shoppers said they would be open to banking with the likes of Amazon

**13** AND AMAZON SETS THE BENCHMARK FOR SERVICE IN THE SAME MARKETS:

**70%** wish brands and retailers offered services similar to Amazon Prime

**14** BUT THE NEWS ISN'T ALL GOOD FOR AMAZON:

**56%** of global shoppers say that they want Amazon to pay more taxes

**49%** of global consumers say they are worried about Amazon (or their chosen marketplace) dominating the retail landscape

**15** DESPITE THE STRENGTH OF MARKETPLACES, D2C HAS AN IMPORTANT ROLE TO PLAY BUT THERE'S WORK TO DO:

**15%** of all online shoppers said they were most likely to buy directly from the brand they wanted

**6%** the lowly percentage of global shoppers that rate D2C channels as giving them the best experience

**51%** of global shoppers said that free delivery was a key factor in buying directly from brands

**16** DELIVERY MUST BE FAST:

**Faster delivery** – the number one thing that global consumers would change about online shopping

**30%** of global shoppers expect their online order to be delivered within 24 hours

**48%** the percentage of global shoppers who said that they wanted faster delivery

**66%** of shoppers say marketplaces are best at speedy delivery

**17** SOCIAL COMMERCE IS ALREADY HERE AND ON COURSE FOR MAJOR GROWTH:

**44%** of global shoppers have already bought from a social platform

**56%** intend to shop more through social platforms in the future

**18** CONSUMERS WANT DIGITAL INNOVATION FROM BRANDS, RETAILERS AND MANUFACTURERS:

**66%** of global shoppers wish brands and retailers would be more digitally innovative

**60%** agree that if a brand is digitally innovative, they are more likely to purchase from them

**62%** of global shoppers are excited about stores with no checkouts like Amazon Go

**59%** of US consumers use or have used a voice assistant to order a product

**19** THE ENVIRONMENT IS A KEY FACTOR IN DECISION MAKING:

**71%** of online shoppers said they wish retailers and brands offered better environmental practices, such as less packaging

**67%** say a company's ethics and morals play an important part in their purchasing decision



# SECTION 1: COVID-19 AND ITS IMPACT

## SECTION 1: COVID-19 AND ITS IMPACT

Let's begin our 2021 report with a close look at what consumers have made of digital commerce during the pandemic, and how it has changed their attitudes, expectations and behaviors.

### CHAPTER 1: ONLINE SAVED CONSUMERS DURING THE PANDEMIC

Despite the crippling impact of COVID-19 on many retail and commercial brands, in another age, without the ability to trade online, the impact of lockdown closures would have been even more devastating than what we have experienced.

Consumers share the view that digital commerce has been a saving grace in very trying times, with 72% of global shoppers saying online shopping came to their rescue in 2020.

What is more, 73% said eCommerce will be even more important to them this year, either because they expect more pandemic-related disruption, or because the experiences of 2020 have permanently changed their shopping habits.

Our data shows a clear split across age groups in attitudes to digital commerce through the pandemic.

Older shoppers are much more ambivalent about its impact. Among the over-55 age

group, a much lower-than-average figure of 54% said eCommerce had come to their rescue, even though we might presume that a higher proportion of older people had to self-isolate or shield from the virus, while 26% were neutral on its impact.

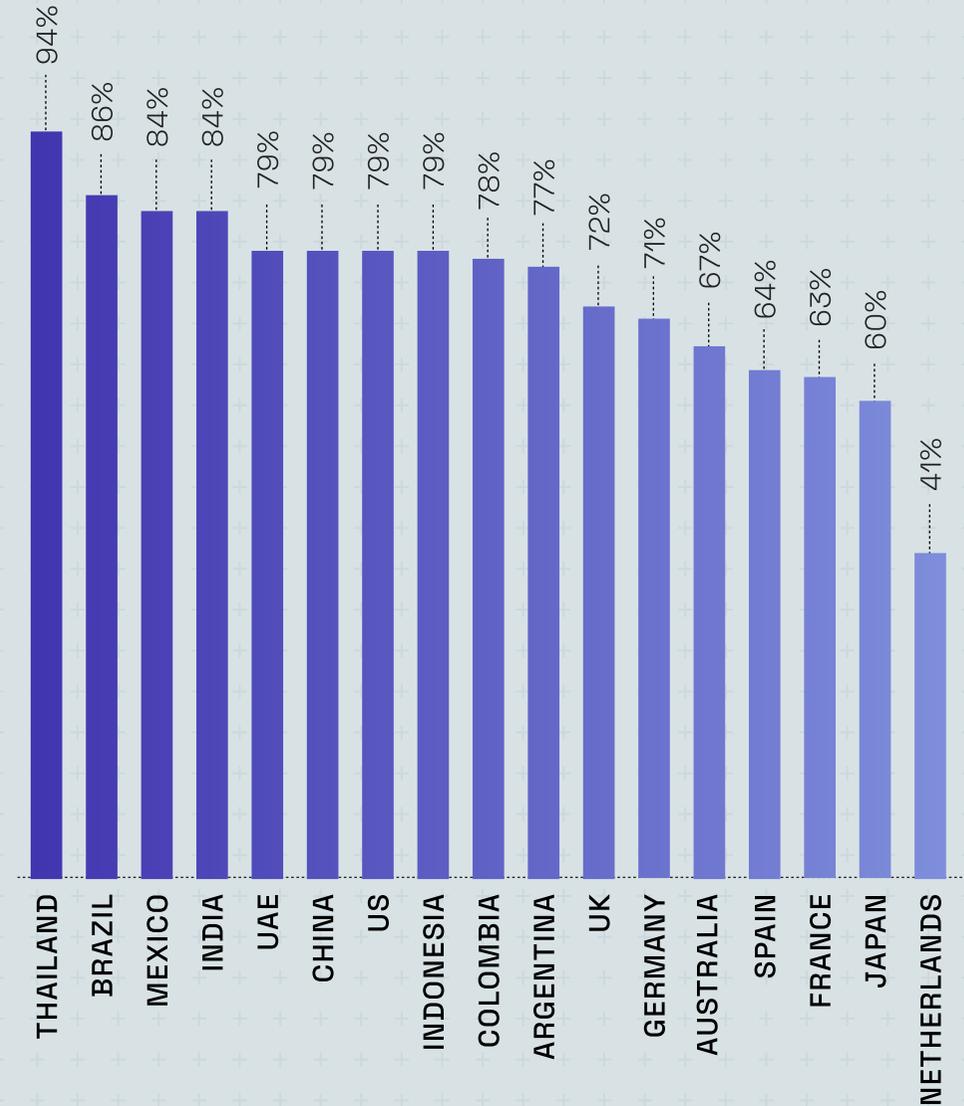
Similarly, 51% of over-55s said online shopping would be more important to them in 2021, with 34% having no opinion one way or the other. This compares to 79% of 25 to 34-year-olds saying they will lean on digital even more this year.

Geographical differences are evident too.

Shoppers in APAC are the most enthusiastic about digital commerce's impact on their lives during the pandemic, led by Thailand where upwards of 90% of shoppers said it had been their lifeline, and would be even more important to them this year. And this sentiment was strong in LATAM too, with Brazil and Mexico at 86% and 84% respectively.

This contrasts to feelings in Europe, where a smaller 62% said online had saved them, and with the Dutch in particular, where 29% of consumers completely disagreed that online shopping had helped them through the pandemic to date, the most across all countries. In the Netherlands, Germany and France combined, only around half of shoppers (52%) felt they would need digital commerce more in 2021.

### ONLINE SHOPPING CAME TO MY RESCUE



**72%** OF GLOBAL SHOPPERS SAY THAT ONLINE SHOPPING CAME TO THEIR RESCUE IN 2020



## CHAPTER 2: THE PANDEMIC HAS CHANGED CONSUMER BEHAVIOR FOR GOOD

Not surprisingly, the experience of physical stores being closed en masse, and the sudden need to lean on digital commerce platforms like never before, has resulted in some notable shifts in consumer behavior.

One of the key drivers of these changes is a greater comfort with technology. 60% of global shoppers said they were now more comfortable using digital technology – a logical result after being forced to embrace digital solutions to socializing and shopping through the pandemic.

**60% OF GLOBAL SHOPPERS SAY THEY ARE NOW MORE COMFORTABLE WITH TECHNOLOGY**

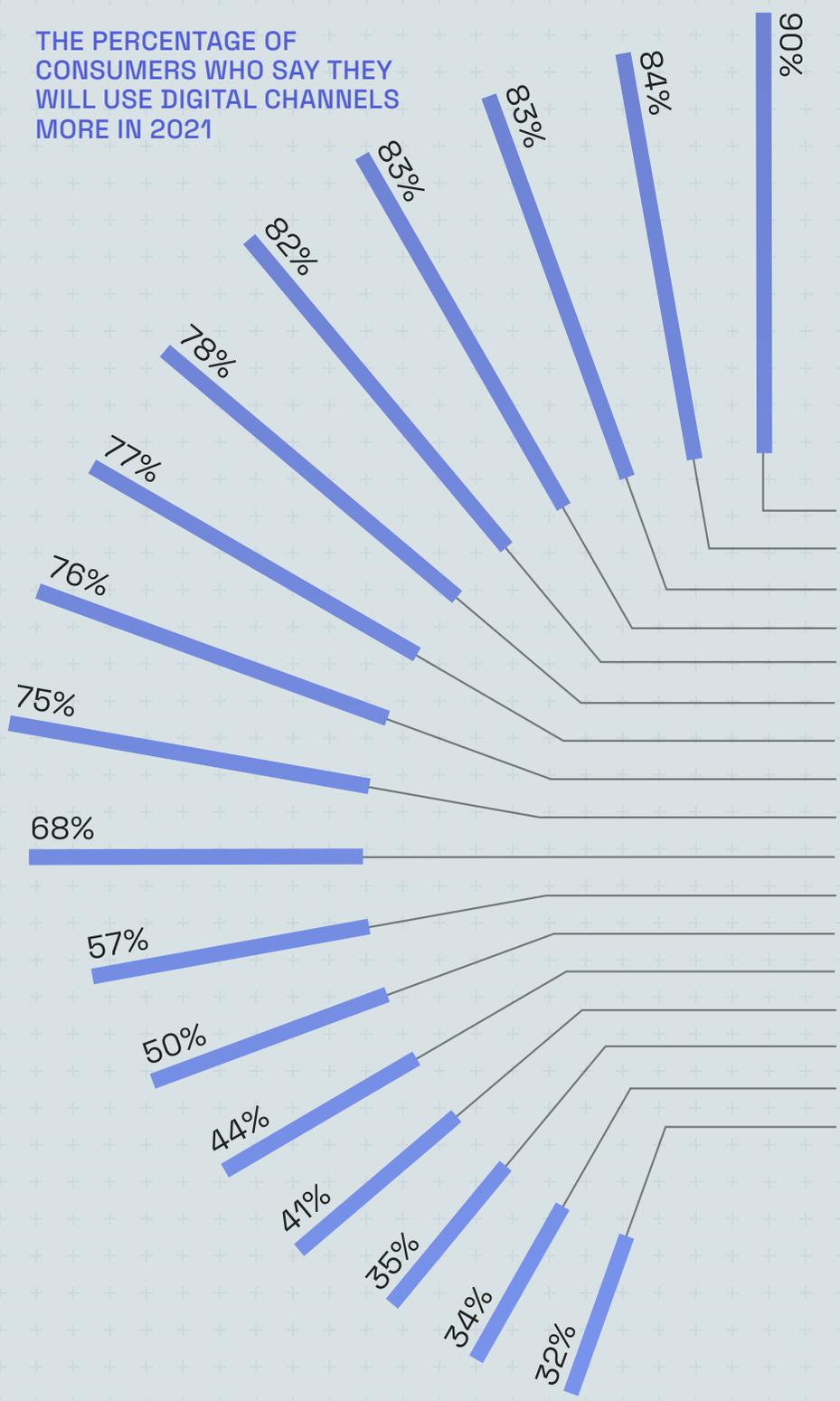
And this increased comfort has changed the way consumers shop. Overall, 80% of our survey respondents reported that the way they shop has changed. 30% said their shopping habits have changed permanently, while another 50% said they expect to retain at least some of the changes to the way they have shopped during the pandemic. Clearly, it is vital that brands and retailers re-address how they deliver experiences to their customers going forward, based on these changing habits.

**80% OF GLOBAL SHOPPERS SAY THAT THE WAY THAT THEY SHOP HAS CHANGED**

But it is not just technical comfort that is the catalyst. Another driver in this change is the ongoing fear factor. On average, 41% told us they are still frightened about shopping in-store in the wake of COVID-19, with the figure no doubt bolstered by countries enduring seemingly the worst of the pandemic when the research was undertaken, such as India and Brazil. And nearly two-thirds (64%) said they were now more concerned about getting hacked as a result of using connected devices – another consequence of increased familiarity with technology.

**41% OF GLOBAL SHOPPERS SAY THEY ARE STILL FRIGHTENED ABOUT SHOPPING IN-STORE**

**THE PERCENTAGE OF CONSUMERS WHO SAY THEY WILL USE DIGITAL CHANNELS MORE IN 2021**



**WHAT PERCENTAGE OF CONSUMERS ARE FRIGHTENED ABOUT SHOPPING IN-STORE?**



These figures reveal some of the opportunities and challenges that the pandemic has created for retailers and brands. Fear about returning to stores also presents a big issue for those many thousands of retailers who do not have a digital-only, digital-first, or even an omni-channel business model. And it's clear, for example, that consumers are growing more savvy about their digital security and online privacy. Businesses have to respond with safe digital shopping spaces or risk losing custom.

And this change is not temporary, with 62% of consumers globally saying that they plan to use digital channels more for their shopping.

But what's really interesting is that there is disparity across countries in these figures. In Thailand (90%), Colombia (84%), Brazil (83%) and China (83%), for example, we can really see how the appetite for digital commerce is booming, with more consumers likely to use digital channels to shop in the next year.

On the flipside, the percentages in Europe are slightly lower. For example, in the UK, 44% of consumers said they will use digital more this year, down from 58% in 2020. The difference is even more pronounced in France, down from 68% to 33%, and in Germany, down from 64% to 35%.

## CHAPTER 3: BUT IT'S NOT JUST ABOUT ONLINE, IT'S ABOUT OMNI-CHANNEL

So, if a high percentage of consumers are genuinely worried about going back to stores, whilst at the same time they are more comfortable using digital channels and want more digital products, is it finally time to ring the death knell for physical retail?

Certainly not according to our survey findings and the encouraging, initial reports of shoppers returning to the high street.

More than 3 in 5 respondents (62%) this year told us that they think it is important for a brand to have a physical store – a notable increase on the 51% who said the same last year. Moreover, 64% said they prefer to shop with brands that have both an online and offline presence.

A notable finding was that 59% of consumers also said they wished brands would communicate seamlessly with them across all channels, both digital and physical.

What is interesting about this is that, while one might imagine that it is the older generations who are clinging onto physical shopping, in fact it is younger shoppers who are more interested in having better omni-channel options, dispelling the myth that older consumers prefer to shop in-store, while digital commerce is a young person's game.

63% of 16 to 24-year-olds said they felt it was still important for brands to have physical stores, versus 48% of over-55s. Among slightly older Millennial shoppers, 68% of 25 to 34-year-olds and 68% of 35 to 44-year-olds said they preferred to shop with brands that had both digital and physical stores, dropping to 52% of over-55s.

And 66% of all shoppers aged under 45 said they wanted better cross-channel communication, more than halving to just 30% of over-55s.

Looking at other responses, it is clear why younger shoppers in particular value the option of both online and physical stores – they want maximum flexibility in how and where they buy.

Nearly three-quarters of consumers (74%) told us that they like to research products online before buying in-store. 64% also told us that they thought it was important a brand or retailer offered Click and Collect, an indication of wanting greater flexibility around fulfillment. There was also a clear age gap here – two-thirds (67%) of 16 to 24-year-olds said they wanted a Click and Collect option, versus 43% of over-55s.

Both of the above examples suggest consumers are becoming increasingly comfortable switching between on and offline channels at different stages of their shopping journey. In doing so, what we're actually seeing is the lines between on and offline being erased once and for all. Based on these consumer preferences, the customer journeys of the future will be omni-channel in its purest sense – complete integration and complete flexibility, supporting seamless commerce.

**64% OF GLOBAL SHOPPERS SAY THEY PREFER TO SHOP WITH BRANDS THAT HAVE BOTH ONLINE & OFFLINE PRESENCE**

### DID YOU KNOW:

Physical shopping is not just the preserve of the older shopper. In fact, **63% of 16 to 24-year-olds** want retailers and brands to have physical and digital stores vs **48% of over-55s**, and want maximum flexibility in how and where they buy.

## CHAPTER 4: WHETHER IT'S ONLINE OR ACROSS CHANNELS, "GOOD ENOUGH" IS NO LONGER GOOD ENOUGH!

Our survey results show that not only are consumers behaving differently in the wake of COVID-19, but their expectations have changed, too. To put it bluntly, people are less prepared to put up with mediocre or even "satisfactory" shopping experiences. They demand excellence.

Three quarters (73%) of shoppers told us retailers need to get better at giving them the products, services and experiences they want. More than half (56%) say they won't shop with anyone who doesn't meet their digital expectations.

The challenge being thrown down to businesses by their customers is clear – we're using digital commerce more, we're more comfortable with the technology, and we're more in tune with what we want and expect. If you don't deliver, we'll look elsewhere. The emphasis on digital expectations also underlines how all consumer experiences are now omni-channel experiences, with digital acting as the hub of all interactions influencing every sales channel.

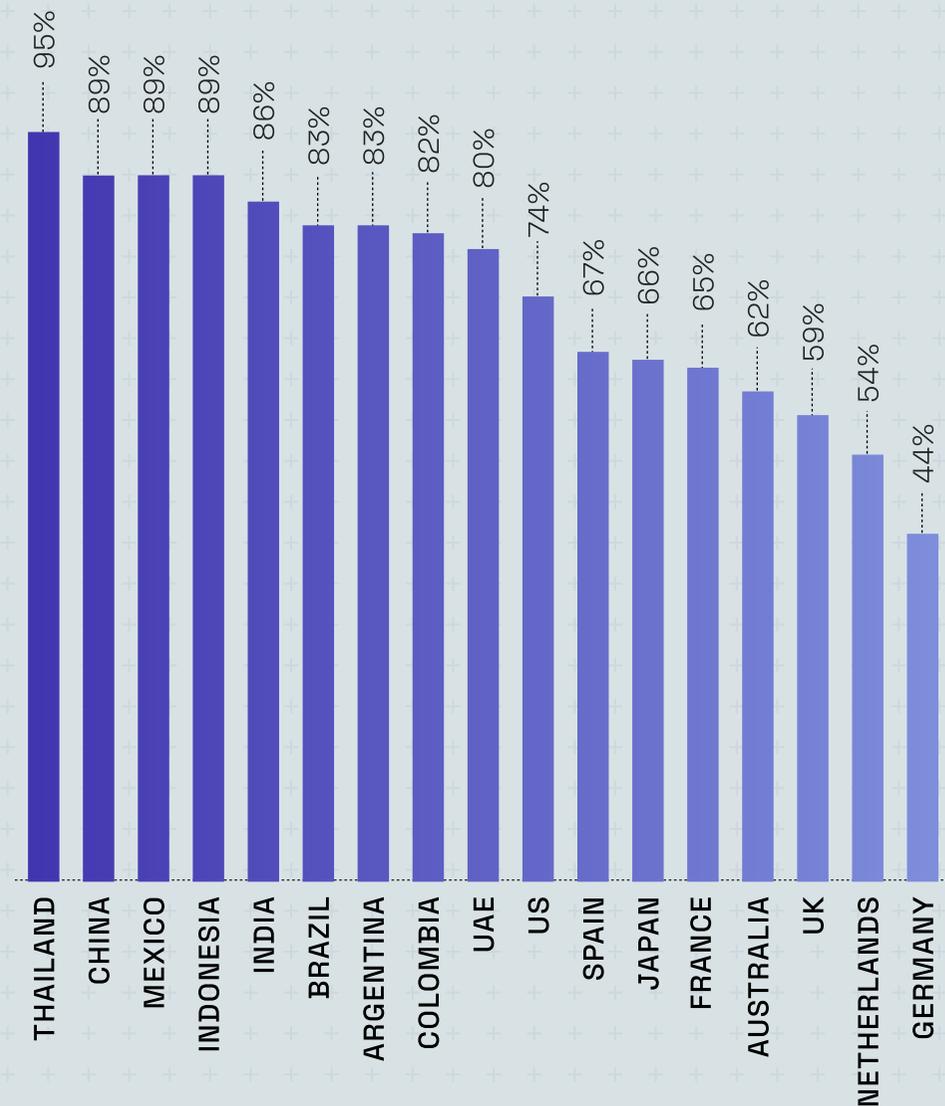
We can see a clear correlation across countries in terms of how engaged shoppers say they have been with digital commerce through the pandemic and their levels of expectation going forward.

For example, across Asia, consumers reported that digital commerce has been more important to them during the pandemic than anywhere else, and it is shoppers in this region who are also now demanding the most from digital retailers. Thailand tops the list again, where 94.8% of shoppers say they want better products, services and experiences online, closely followed by China (89.3) and Mexico (89.1%).

China is also way out in front in terms of the proportion of consumers (73.1%) who say they will refuse to shop with anyone who doesn't meet their expectations.

**73% OF GLOBAL SHOPPERS SAY THAT RETAILERS NEED TO GET BETTER AT GIVING THEM THE PRODUCTS, SERVICES AND EXPERIENCES THAT THEY WANT**

## WHICH COUNTRIES' CONSUMERS THINK THAT RETAILERS NEED TO GET BETTER AT GIVING THEM THE PRODUCTS, SERVICES AND EXPERIENCE THAT THEY WANT FROM ONLINE SHOPPING?



WHAT PERCENTAGE OF COUNTRIES' CONSUMERS REFUSE TO SHOP WITH ANYONE WHO DOES NOT MEET THEIR DEMANDS?

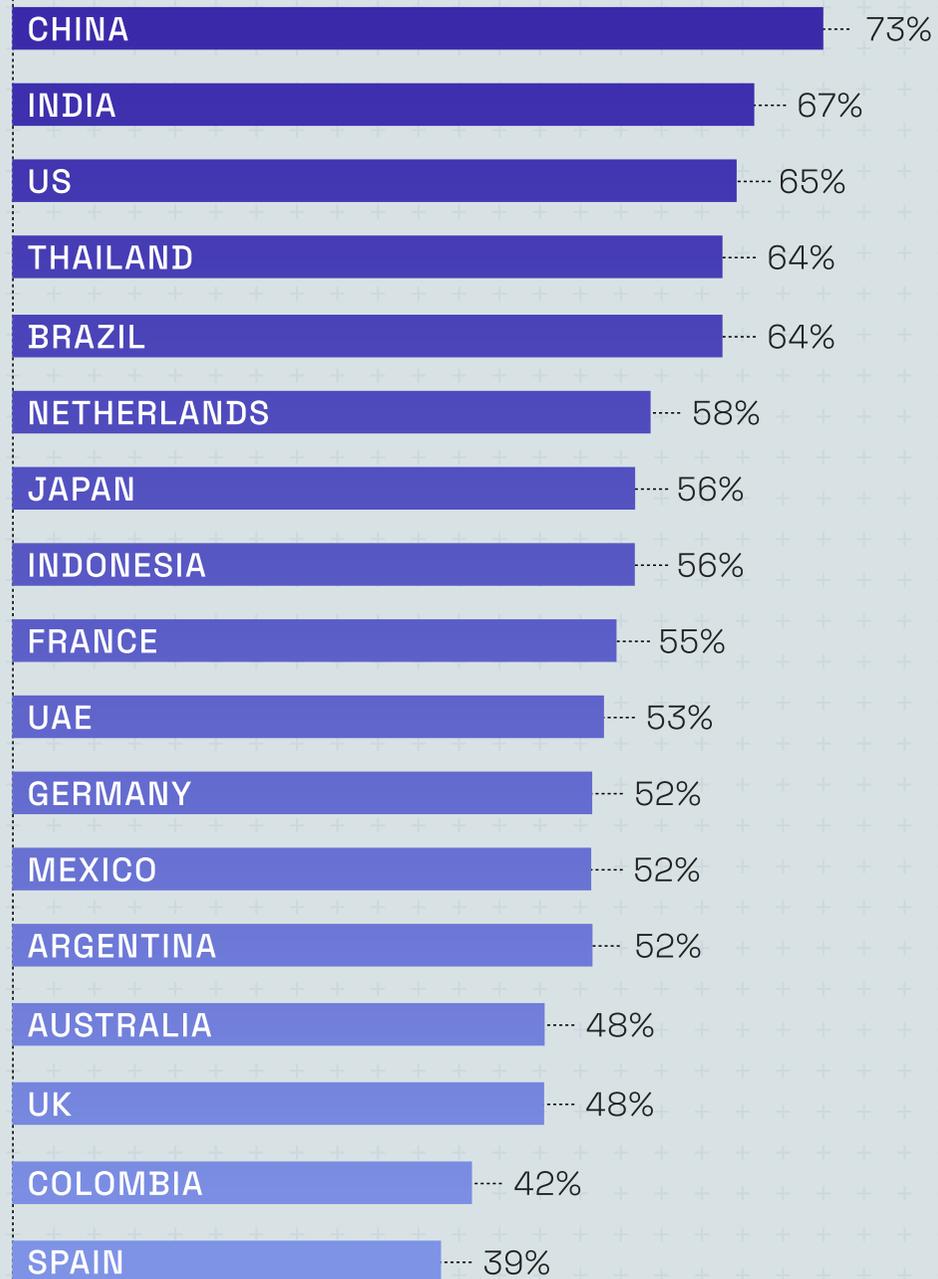


IMAGE COURTESY OF SELFRIDGES



## CHAPTER 5: PEOPLE ARE SPENDING MORE ONLINE IN THE WAKE OF THE PANDEMIC

To conclude our overview of how the COVID-19 pandemic has affected consumer shopping habits and attitudes, we need to look at one key area – how much shoppers are spending online.

The pandemic has been a gamechanger for digital. Consumers reported that prior to the pandemic, the online-offline split in their spending was 45%-55%.

In the midst of the pandemic and at the height of restrictions, the online share of spend soared to 61%.

But when asked what their shopping habits will be in the wake of lockdown measures easing, consumers are now saying their spending split is 51% online vs 49% offline – a fall since the heights of lockdown, but a rise since pre-COVID-19 times.

Looking at results regionally, shoppers in Latin America claim that they will experience the biggest shift to online purchasing, from 39% pre-COVID-19 to 52% in a post-COVID-19 world, a 13% increase.

The country to experience the biggest increase once COVID-19 is vanquished is Argentina, which, according to our respondents' estimates, will see a 14% increase in online spend. Meanwhile, both Chinese and Indian consumers say that their online spending would be marginally down in a post-COVID-19 world compared to what it was in a pre-COVID-19 world.

Perhaps, most interestingly of all, even though older shoppers have been less likely to talk up the importance of digital through the pandemic or its impact on their shopping habits, the oldest age group has seen the biggest shift in spending towards digital.

Over-55s reported an 11% increase in online spending from before the pandemic to the present, compared to an uplift of just 1.6% among 16 to 24-year-olds. The only qualification to this is that over-55s are still the only age group spending less online (46%) than they do offline.

### ┌ DID YOU KNOW:

Countries in **LATAM** expect to see the biggest increases in online shopping in a post-COVID-19 world vs a pre-COVID-19 world, with **Argentina** being the country to see the biggest increase.

**THE PERCENTAGE SHIFT  
TO DIGITAL SHOPPING IN  
A POST-COVID-19 WORLD**

	PRE-COVID-19	DURING-COVID-19	POST-COVID-19	(+/-)
<b>GLOBAL</b>	45%	61%	51%	+6%
<b>US</b>	51%	62%	54%	+3%
<b>EUROPE AVERAGE</b>	43%	59%	49%	+6%
GERMANY	43%	56%	48%	+5%
FRANCE	42%	57%	48%	+6%
UK	46%	66%	51%	+5%
SPAIN	40%	59%	49%	+9%
NETHERLANDS	42%	56%	47%	+5%
<b>APAC AVERAGE</b>	48%	60%	52%	+4%
CHINA	55%	64%	54%	-1%
JAPAN	41%	51%	48%	+7%
THAILAND	51%	62%	54%	+3%
INDONESIA	43%	62%	50%	+7%
INDIA	56%	65%	55%	-1%
AUSTRALIA	43%	58%	49%	+6%
<b>LATAM AVERAGE</b>	39%	62%	52%	+13%
ARGENTINA	38%	62%	52%	+14%
BRAZIL	42%	65%	55%	+14%
COLOMBIA	38%	61%	51%	+13%
MEXICO	38%	62%	50%	+12%
<b>UAE</b>	49%	65%	53%	+4%

# SECTION 1: KEY CONSIDERATIONS & ACTIONS

**REVIEW YOUR ONLINE COMMERCE STRATEGY. IS IT FIT FOR THE POST-COVID-19 WORLD AND IS IT OMNI-CHANNEL?**

- Talk to our consultancy team about developing your “balanced channel” commerce strategy.
- Our data experts can help to deliver a single customer view across systems that inspires a true omni-channel experience.
- Review with our technology leads the technologies that support your customers’ journeys - and that you should be adopting.

**REVISIT YOUR CUSTOMERS’ ONLINE PURCHASE JOURNEY; IT’S LIKELY TO HAVE CHANGED IN THE LAST YEAR AND SET TO STICK.**

- Talk to our CX team about mapping and enriching your customers’ journeys.

**INVESTIGATE WHAT YOUR CUSTOMERS’ EXPECTATIONS ARE OF YOU. DO YOU KNOW WHAT GOOD LOOKS LIKE IN THEIR EYES? ARE YOU DELIVERING THIS?**

- Our CX team can conduct qualitative and quantitative research on your behalf and build strategic roadmaps to deliver great experiences.





# SECTION 2: THE CUSTOMER JOURNEY

## SECTION 2: THE CUSTOMER JOURNEY

Digital commerce has changed what we now call ‘the customer journey’ significantly. Compared to traditional offline commerce channels, digital has added previously unimaginable levels of choice and variety in terms of how we shop, where we shop, how we discover products and much more besides.

It is also clear that, just as digital technology keeps on evolving, so do the processes that make shopping happen. The customer journey is a fluid, dynamic concept. In the wake of the upheavals of the COVID-19 pandemic, there is a pressing need to check our understanding of it again.

In this section, we hone in on what consumers across the globe have to say about key aspects of the digital shopping journey – where they look for inspiration for purchases, where they search for products and services, where they are most likely to make purchases and what the biggest influences on their purchasing decisions are.

### CHAPTER 1: INSPIRATION

In 2020’s Future Shopper survey, there were two very clear winners when it came to the places where shoppers found inspiration – Amazon and search engines like Google, both cited by more than half of the consumers we

spoke to. The next most popular source for inspiration was retailer sites, named by 19% of respondents. We speculated then that this was a sign of the biggest digital players consolidating their grip over the entire online consumer journey.

The picture we get this year suggests that the consumers are looking for inspiration in a richer variety of places than ever before, but it also largely depends on which countries we look at.

Amazon remains the most popular source of inspiration across several markets. This is true of the US, where 57% of consumers use it to get ideas about what to buy, as well as the UK (52%), Germany (56%) and Spain (55%). All of these are countries where Amazon is a mature and, in many cases, dominant force in online commerce, and incidentally they are also countries where Prime membership is highest.

But elsewhere, we see much more variety in the different ways shoppers go about looking for purchase ideas, with plenty of local and regional influence.

One obvious factor is that marketplaces other than Amazon score highly on inspiration in parts of the world where they still out-compete Amazon.

### EXPERT OPINION: WHY GETTING YOUR MARKETPLACE STRATEGY RIGHT IN APAC IS KEY TO BUSINESS SUCCESS IN THIS REGION

For many brands in APAC, marketplaces have become a critical part of their sales strategy, providing for exposure and consumer discovery, inspiration through an ever-evolving experience framework, and, of course, conversions, as the marketplaces are ultimately about driving sales. So, while selling on marketplaces may sound like a simple choice, it is anything but. With many markets having their own local hero marketplaces (e.g. Lazada, Shopee, Tokopedia), but with many others usually competing closely for traffic, it is unlikely that a brand would find a single marketplace solution to fit all their sales requirements. As such, developing a comprehensive strategy is fundamental to success.

Considerations should include traffic and visibility, fulfillment partnerships, data transparency and sharing agreements, data-led targeting and media products, advances in engagement products that can be used (such as live streaming commerce), and potentially most critically access to hero promotions during Super Brand Days or other shopping festivals. This last point is becoming vital as an ever-increasing volume of sales come from promotional days such as 11.11 (Singles’ Day), and so a brand’s ability to stand out on that day is critical to their ability to drive sales on the day.



**JUSTIN PEYTON**  
CHIEF STRATEGY & TRANSFORMATION OFFICER  
APAC

## “ ” EXPERT OPINION: WHY MERCADO LIBRE IS VITAL TO A GLOBAL MARKETPLACE STRATEGY

Mercado Libre is the largest online commerce and payments ecosystem in Latin America and is still growing in reach and depth of offering. Supporting its growth, it has also developed a strong value offer for small-medium sized businesses specifically through the development of an accessible payment solution (Mercado Pago) and logistics service (Mercado Envios) that have tackled the most challenging pillars of eCommerce in the region i.e. cost of finance services and logistics. This has empowered the value proposition towards the customer experience and value for consumers.

Mercado Libre in LATAM is the destination for any consumer decision making in most countries they operate in, encouraging all participating brands to pay attention to their product content, value proposition and customer satisfaction with more focus than ever before. Mercado Libre has, then, transformed itself into an essential piece of any digital commerce ecosystem for any brand seeking to avoid a loss of market share, retain and build market share.



**GLENDA KOK**  
CHIEF OF TECHNOLOGY BUSINESS FOR LATAM

For example, Mercado Libre is the most popular channel in Latin America, being used by 50% of online shoppers when they want some inspiration; including Argentina where it's used by a resounding 76% of shoppers for inspiration. The various marketplaces that compete in the giant markets of Asia, such as Tmall, Taobao, and Lazada, are even more dominant, and used by 48% of shoppers.

Whether it is Amazon, Mercado Libre, one of the Alibaba-owned platforms or anything else, the high percentage of consumers using marketplaces at the earliest stage of the online shopping journey is a challenge for retailers and brands.

But it's not all doom and gloom for anyone who isn't a marketplace. In this year's survey we also clearly see that consumers are embracing alternative sources of inspiration. In Asia, the US and Australia, for example, social media is now the second most popular place that consumers look to for inspiration. In Latin America, social was named by just 3% fewer people than Mercado Libre in first place.

In India, close to one in five online shoppers (19%) say they take inspiration from retailers' mobile apps – more than those that use retailer websites for the same purpose. And in Indonesia and Thailand, 28% and 23% respectively say they get ideas from

aggregator and delivery apps, highlighting yet another emerging trend to watch develop across the world.

Finally, a global high of 29% of shoppers in China said they used branded direct-to-consumer sites as a source of inspiration, putting that channel third behind dominant marketplaces like Taobao and Tmall, and social media. As far as China can nowadays be considered a pacesetter in global consumer trends, that's good news for brands wondering if and how they can break through the noise of increasingly crowded digital markets. In China, brands clearly do it successfully early in the customer journey.

While there is a lot of variation in how and where consumers are looking for inspiration in the post-COVID-19 global retail landscape, there is much greater consensus across regions on one thing at least. 80% of people told us they wanted to get from product inspiration to purchase as quickly as possible, with the lowest figure (63% in Japan) still a clear majority.

Again, on the face of things, this appears to favor giant marketplaces that can offer inspiration, search and purchase all in one place. But the fact that consumers are still prepared to use retail, brand, social, search and other third-party channels for inspiration in significant numbers indicates that all is not lost.

80% OF GLOBAL SHOPPERS SAY THAT THEY WANT TO MOVE FROM PRODUCT INSPIRATION TO PURCHASE AS QUICKLY AS POSSIBLE. WE CALL THIS “COMPRESSED COMMERCE”, WHERE SPEED IS OF THE ESSENCE

## THE LEADING SOURCES OF INSPIRATION FOR ONLINE SHOPPERS

# 01

# 02

# 03

### GLOBAL

39% - SEARCH ENGINES

33% - SOCIAL MEDIA

32% - OTHER MARKETPLACES  
29% - AMAZON

### US

57% - AMAZON

33% - SOCIAL MEDIA

31% - SEARCH ENGINES

### EUROPE

#### GERMANY

56% - AMAZON

41% - SEARCH ENGINES

27% - RETAILER SITES

#### FRANCE

43% - SEARCH ENGINES

38% - AMAZON

25% - BRAND SITES

#### UK

52% - AMAZON

37% - SEARCH ENGINES

29% - RETAILER SITES

#### SPAIN

55% - AMAZON

32% - SEARCH ENGINES

27% - BRAND SITES

#### NETHERLANDS

45% - OTHER MARKETPLACES

45% - SEARCH ENGINES

37% - RETAILER SITES

### APAC

#### CHINA

50% - OTHER MARKETPLACES

42% - SOCIAL MEDIA

29% - BRAND SITES

#### JAPAN

45% - SEARCH ENGINES

44% - OTHER MARKETPLACES

37% - AMAZON

#### THAILAND

70% - OTHER MARKETPLACES

61% - SOCIAL MEDIA

38% - SEARCH ENGINES

#### INDONESIA

76% - OTHER MARKETPLACES

46% - SOCIAL MEDIA

41% - SEARCH ENGINES

#### INDIA

49% - AMAZON

34% - SOCIAL MEDIA

31% - SEARCH ENGINES

#### AUSTRALIA

43% - SEARCH ENGINES

36% - SOCIAL MEDIA

25% - OTHER MARKETPLACES

### LATAM

#### ARGENTINA

76% - MERCADO LIBRE

42% - SEARCH ENGINES

42% - SOCIAL MEDIA

#### BRAZIL

44% - SEARCH ENGINES

37% - MERCADO LIVRE

35% - OTHER MARKETPLACES

#### COLOMBIA

43% - MERCADO LIBRE

42% - SEARCH ENGINES

39% - SOCIAL MEDIA

#### MEXICO

45% - MERCADO LIBRE

45% - AMAZON

40% - SOCIAL MEDIA

### UAE

51% - AMAZON

47% - SEARCH ENGINES

32% - SOCIAL MEDIA

## CHAPTER 2: WHERE DO GLOBAL ONLINE SHOPPERS SEARCH?

Not so long ago, it was commonplace to refer to search as the start of the online shopping journey. The point where customers actually start to look for a specific product was seen as the first opportunity to attract leads and start the conversion process.

As with inspiration, once again in the markets where Amazon has the biggest share of the digital retail market – the UK, US, Germany, Spain, India, UAE – the Seattle-based marketplace stands way out in front of the competition for product search.

Across those markets, 59% of consumers use Amazon to search for products, in some cases almost double the number who use search engines, while globally, 38% of online shoppers search on Amazon.

### WHERE AMAZON IS WELL ESTABLISHED WITHIN THE LOCAL MARKET, 3 IN 5 SHOPPERS USE IT FOR PRODUCT SEARCH

A decade ago, the idea that Google could be matched on search for anything would have been unthinkable. Now, in several key markets around the world, Amazon has comfortably overtaken it when people are looking for specific products to buy. And unlike Google, brands and retailers need to rethink their SEO or paid search to get the benefits of those Amazon searches.

However, Amazon's domination of search is not as complete as it was last year, even in the markets where it is stronger. In the US and UK, for example, upwards of 80% of consumers told us they used Amazon to search for products last year, but that was down to 61% and 56% respectively this year. Could this be the effect of lockdown, where consumers had more time and were possibly more inclined to search elsewhere for the products they really wanted?

Despite this dip, marketplaces across the world are strong when it comes to search, for instance, Mercado Libre in Latin America, where 55% of consumers use it for search, and the Asian marketplaces. In nearly all markets we surveyed, the top two consumer preferences for search were either Amazon or alternate marketplaces, plus search engines – two notable exceptions being Mexico, where Mercado Libre and Amazon make up the top two.

So, is there any room for other channels in this struggle for supremacy between marketplaces and search engines on search? The big mover in this year's survey was undoubtedly social media. Mentioned by just 8% of respondents in last year's report, social is now the third favorite search option for US consumers, used by 28% of them.

An even higher proportion of shoppers use social media for search in India (32%), the UAE (32%) and Latin America (31%). In Australia, meanwhile, retailer sites rank as the second most popular search option (37%) behind search engines, and third in Europe (31%).

### EXPERT OPINION: WHY GETTING YOUR CONTENT RIGHT ON AMAZON IS KEY TO CONSUMERS DISCOVERING YOUR PRODUCTS

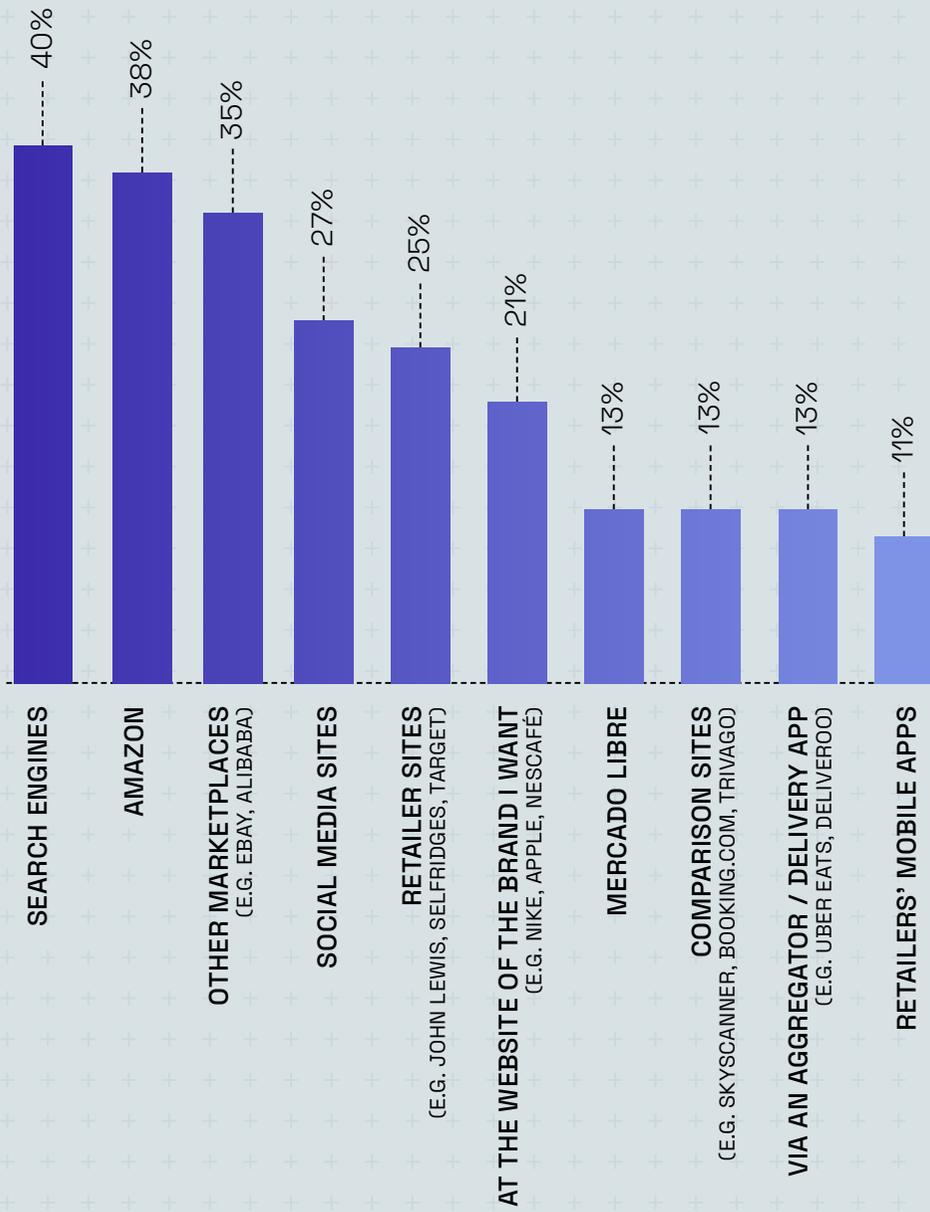
With our research showing that more than 2 in every 3 consumers head to Amazon to search for products in many of the leading markets we surveyed, content is critical in converting this interest into transactions. It's vital to create and add content that attracts their attention, and engages them, presenting imagery and details that address any questions or concerns they may have; and this should be done at scale, with content for all the items in your Amazon catalog optimized and standardized across international markets, to guide customers to your products. Product titles, images, descriptions, keywords and categories should all help to inspire consumers on their journey from discovery to purchase, and the more persuasive the content you present, the more likely your listing will rise to the top of search results and secure more purchases.



#### FRANK KOCHENASH

PRESIDENT, WUNDERMAN THOMPSON COMMERCE, MARKETPLACE SERVICES, NORTH AMERICA  
LEADER, WPP CENTER OF EXCELLENCE FOR AMAZON

## WHERE DO GLOBAL SHOPPERS SEARCH FOR PRODUCTS ONLINE?



NB. As searches can start in different places for different purchases, respondents were able to choose multiple options – the reason why the totals do not add up to 100%.

\*Aggregators are sites that collect data from other online sources and present the information in one place so consumers can assess the best items, services or deals to meet their needs. Examples include Deliveroo, Rappi, JustEat and Comparethemarket.com



## THE LEADING CHANNELS FOR SEARCH ACROSS COUNTRIES

# 01

# 02

# 03

### GLOBAL

40% - SEARCH ENGINES

37% - SOCIAL MEDIA CHANNELS

35% - OTHER MARKETPLACES

### US

61% - AMAZON

31% - SEARCH ENGINES

28% - SOCIAL MEDIA CHANNELS

### EUROPE

#### GERMANY

58% - AMAZON

46% - SEARCH ENGINES

29% - RETAILER SITES

#### FRANCE

44% - SEARCH ENGINES

41% - AMAZON

27% - BRAND SITES

#### UK

56% - AMAZON

34% - SEARCH ENGINES

34% - RETAILER SITES

#### SPAIN

62% - AMAZON

33% - SEARCH ENGINES

32% - BRAND SITES

#### NETHERLANDS

45% - OTHER MARKETPLACES

43% - SEARCH ENGINES

37% - RETAILER SITES

### APAC

#### CHINA

62% - OTHER MARKETPLACES

46% - SOCIAL MEDIA CHANNELS

28% - SEARCH ENGINES

#### JAPAN

55% - OTHER MARKETPLACES

45% - AMAZON

36% - SEARCH ENGINES

#### THAILAND

78% - OTHER MARKETPLACES

58% - SOCIAL MEDIA CHANNELS

44% - SEARCH ENGINES

#### INDONESIA

85% - OTHER MARKETPLACES

47% - SOCIAL MEDIA CHANNELS

40% - SEARCH ENGINES

#### INDIA

58% - AMAZON

38% - SOCIAL MEDIA CHANNELS

36% - OTHER MARKETPLACES

#### AUSTRALIA

45% - SEARCH ENGINES

37% - RETAILER SITES

30% - BRAND SITE

### LATAM

#### ARGENTINA

83% - MERCADO LIBRE

42% - SEARCH ENGINES

33% - SOCIAL MEDIA CHANNELS

#### BRAZIL

49% - SEARCH ENGINES

44% - OTHER MARKETPLACES

43% - MERCADO LIVRE

#### COLOMBIA

48% - MERCADO LIBRE

46% - SEARCH ENGINES

37% - SOCIAL MEDIA CHANNELS

#### MEXICO

47% - MERCADO LIBRE

40% - AMAZON

34% - SEARCH ENGINES

### UAE

61% - AMAZON/SOUQ -  
NOON - INSTASHOP

50% - SEARCH ENGINES

32% - SOCIAL MEDIA CHANNELS

## CHAPTER 3: WHICH CHANNELS DO GLOBAL ONLINE SHOPPERS USE TO MAKE PURCHASES?

Given what we have said about where shoppers around the globe like to find purchase inspiration and search for specific products, it shouldn't be a surprise that marketplaces command the biggest share of online consumer spend.

Taken globally, when we asked consumers to break down where they spent their money online over the course of a year, 'other marketplaces', a category which includes the likes of the Chinese giants Alibaba, JD.com, Pinduoduo, eBay and Gumtree, came first with 23% share of wallet, pushing Amazon into third place with 14% after supermarkets and grocers with 18%.

A very clear thread to pick out is that marketplaces are dominating digital consumer spend the world over. If you combine Amazon with other marketplaces and Mercado Livre, that's a 42% global share of wallet.

**33% THE PERCENTAGE OF GERMAN CONSUMERS' SPEND WITH AMAZON, THE HIGHEST OF ALL THE COUNTRIES SURVEYED**

One of the defining features of retail over the next few years will no doubt be competition between marketplaces, as Amazon seeks to increase its reach across Asia, and Alibaba and the rest likewise seek to gain traction

in Western markets. Notably, Germany had the highest percentage of spend going to Amazon, at 33%.

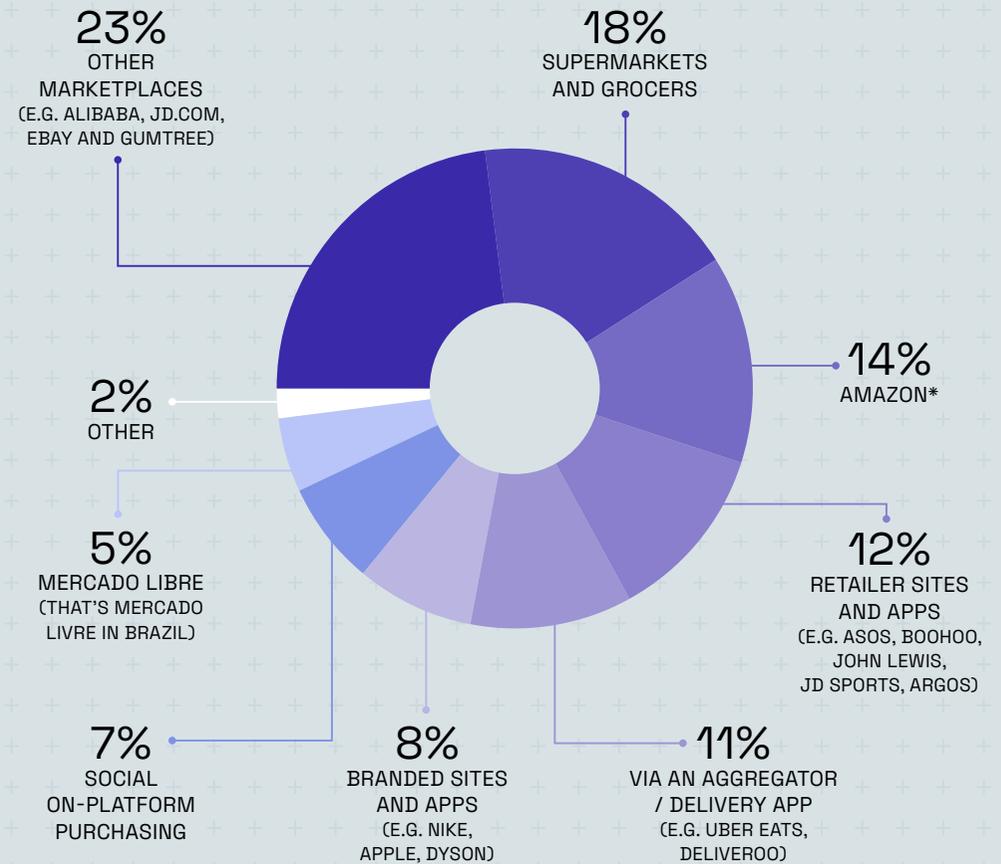
The only real challenge to the dominance of the marketplaces, in terms of where consumers spend their money online, comes from supermarkets and grocery sites, which globally enjoy the second biggest share (18%).

**18% THE PERCENTAGE OF ONLINE SPEND GLOBALLY SPENT WITH SUPERMARKETS AND GROCERS**

The COVID-19 pandemic has clearly impacted these figures. While one in five digital shoppers (19%) still report that they never buy groceries online, this is half the figure we recorded last year. Lockdowns and social distancing concerns have seen a sharp increase in online grocery orders, even where supermarkets have been classed as 'essential' retail and allowed to remain open.

Supermarkets do, of course, stock a lot more than just groceries, and have benefited greatly from being able to keep both online and physical channels running simultaneously in most countries. In the mind of many consumers, supermarkets have offered a lifeline throughout the pandemic, providing a familiar channel to buy from when other outlets have been shut down. For many people, ordering online from their supermarket during lockdown has been their first taste of digital commerce.

## WHERE DO GLOBAL SHOPPERS SHOP?



\*Global figures for Amazon did not include the UAE

## THE MONTHLY FREQUENCY OF GLOBAL PURCHASING THROUGH EACH CHANNEL

SUPERMARKETS AND GROCERS	6.87
VIA AN AGGREGATOR/DELIVERY APP (E.G. UBER EATS, DELIVEROO)	5.76
OTHER MARKETPLACES (E.G. EBAY, ALIBABA, GUMTREE ETC.)	4.81
AMAZON	4.48
SOCIAL ON-PLATFORM PURCHASING	3.98
RETAILER SITES AND APPS (E.G. JOHN LEWIS, ARGOS ETC.)	3.76
OTHER	3.73
MERCADO LIBRE	3.69
BRAND SITES AND APPS (E.G. NIKE, APPLE, DYSON ETC.)	3.09

Supermarkets also benefit from a higher frequency of purchase than any other channel.

Globally, consumers report buying from a supermarket 6.87 times per month on average, compared to 4.48 purchases a month through Amazon and 4.81 through other marketplaces.

Another standout from the frequency of purchase figures is aggregators and delivery apps, which consumers worldwide now report using 5.76 times a month on average. Aggregators have capitalized on the wholesale closure of restaurants and the hospitality sector, greatly extending their hold over the takeout market.

This is already enough to secure the likes of Deliveroo and Uber Eats an 11% share of digital wallet globally – more than branded websites and apps (8%). This development is spearheaded by countries like Indonesia (19%) and Thailand (16%), where aggregators have overtaken supermarkets and grocery retailers even.

As we have seen from how many consumers in these two countries say they turn to these types of apps for purchase inspiration, aggregators have scope to extend far beyond providing a simple delivery service. As a mobile-first solution that can connect any customer to any brand or retailer from the first to the last mile, we expect aggregators to be a force to be reckoned with in the coming years as they extend their reach from food service to retail.

### DID YOU KNOW:

For many consumers previously scared or reluctant to order anything online, **grocery ordering online** has been many consumers' **first foray into online ordering.**

## CHAPTER 4: WHAT DRIVES CONSUMER PURCHASING DECISIONS?

As always, when we asked consumers to name the factors that most influence their online purchasing decisions, price came out on top. Overall, 94.8% of respondents said price was important, and 64.5% said very important.

We can see from the makeup of this list – accurate product descriptions, ease in finding products, stock availability, convenient, free and speedy delivery, customer service and so on – that consumers judge value on more than price alone. Yes, they want to feel they are getting a good deal, but they also want the right kind of experience.

What is clear from this is that brands and retailers cannot trade on just price or speed of delivery. They need to have a firm grip on the entirety of their commerce operations, from product content and loyalty programs to site navigation and product returns. It's a complex balancing act to get this orchestration right to meet consumer demands.

Merchants also need to be aware of new and emerging influences on buying behaviors. Our survey results throw up some very clear differences in influence across age groups which give an indication of how today's younger consumers will be making their purchasing decisions for years to come.

For example, 16 to 24-year-olds are much more likely to make purchases based on recommendations from friends (67.0%) compared to over-55s (43.8%). Similarly, half of 16 to 24-year-olds (49.9%) now say online influencers have a role in their buying decisions, compared to just 22.1% of older shoppers. This all ties in with the 'social shift' of digital commerce, which we will discuss later in this report.

Three quarters (75.7%) of younger shoppers also say they purchase based on getting personalized offers, compared to just of half (52.5%) of over-55s. And interestingly, 66.6% of 16 to 24-year-olds say they factor in the availability of Click and Collect when buying online, versus 42.9% of older shoppers. Again, far from pigeon-holing the youth market as a digital, stay-at-home generation, younger shoppers are telling us clearly that they want flexible, omni-channel options.

## THE TOP 10 FACTORS THAT INFLUENCE PURCHASING DECISIONS ONLINE GLOBALLY

- 01 PRICE OF THE ITEM
- 02 ACCURATE PRODUCT DESCRIPTIONS
- 03 EASY TO FIND THE PRODUCT I'M LOOKING FOR
- 04 THE ITEM I WANT IS IN STOCK
- 05 CONVENIENT DELIVERY
- 06 STRONG CUSTOMER SERVICE
- 07 PRODUCT IMAGERY
- 08 FREE DELIVERY
- 09 SPEED OF DELIVERY
- 10 EASY RETURNS PROCESS

THE NUMBER ONE REASON FOR PURCHASE IS THE PRICE OF THE ITEM. HOWEVER, IT'S NOT ALL ABOUT PRICE AS THE TABLE SHOWS...

## CHAPTER 5: WHO INFLUENCES CONSUMERS?

We also wanted to know who influences consumers' purchasing. The largest majority of consumers globally actually claimed that no one influenced their decision. But we also saw the importance of consumers' close circle of friends and family. In the section on social commerce, we will also look into the effect of social media influencers in decision making.

### WHO INFLUENCES PEOPLE'S PURCHASE DECISIONS?

	GLOBAL	EUROPE	APAC	LATAM	USA	UAE
FRIENDS	<b>21%</b>	20%	17%	22%	14%	24%
FAMILY	<b>19%</b>	18%	24%	24%	21%	22%
SOCIAL MEDIA INFLUENCERS / BLOGGERS	<b>14%</b>	8%	19%	16%	18%	20%
CELEBRITIES	<b>5%</b>	3%	7%	3%	5%	5%
IN-STORE SALES ASSISTANTS	<b>5%</b>	4%	5%	5%	5%	4%
BUSINESS PEOPLE	<b>4%</b>	2%	3%	3%	6%	3%
COLLEAGUES	<b>3%</b>	3%	4%	3%	3%	6%
SPORTS PEOPLE AND ATHLETES	<b>3%</b>	2%	2%	3%	3%	5%
JOURNALISTS	<b>2%</b>	2%	2%	1%	2%	1%
POLITICIANS	<b>1%</b>	1%	1%	0%	2%	1%



## SECTION 2: KEY CONSIDERATIONS & ACTIONS

REVIEW AND RE-THINK HOW YOUR CONSUMERS ARE INSPIRED, HOW THEY SEARCH, AND HOW THEY PURCHASE PRODUCTS.

- Our dedicated marketplace experts across EMEA, LATAM and APAC can help get your marketplace strategy and execution right.
- Our social media consultants can help build and execute a powerful social commerce strategy for you.
- Our search engine marketers can ensure your products are always visible and optimized for the digital shelf.
- We can create the right content to grab the attention of your consumers and maximize sales, be it during the inspiration, search or purchase phases.



# SECTION 3: MAKING THE CASE FOR D2C



## SECTION 3: MAKING THE CASE FOR D2C

For consumer brands, D2C offers something different. From a business perspective, it gives you control over customer data, relationships and service that you just don't get through other channels. But it also provides space to create experiences for your customers that they don't get through other channels.

### CHAPTER 1: MORE ONLINE SHOPPERS MEANS MORE DEMAND FOR D2C

The boom in digital commerce experienced throughout the pandemic has created new opportunities for brand sites. Put simply, with so many more people now shopping online, someone has got to step in and meet demand.

In grocery, for example, when an unprecedented spike in online demand meant delivery slots were scarce and supermarkets were running low on high-demand lines, we saw the likes of Heinz and Pepsi launch D2C offers to get their products to customers during lockdown without the need to go through a middleman.

All of this has translated into some encouraging signs in our 2021 consumer survey data that D2C is on the rise. Most encouraging of all, when we asked consumers to give a breakdown category-by-category of where they were most likely to buy different items, brand sites averaged 15% in purchase intent across all sectors, in second place behind marketplaces (Amazon and other marketplaces combined).

Or to put it another way, if a consumer doesn't buy a product from a marketplace, they are most likely to buy it from a brand site.

**15% OF ONLINE SHOPPERS WERE MOST LIKELY TO BUY DIRECTLY THROUGH THE BRAND THEY WANT**



## EXPERT OPINION: WHAT MUST DIRECT-TO-CONSUMER SITES DO TO ENSURE THE BEST EXPERIENCE FOR THEIR CUSTOMERS?

Over the years we've seen the consumer preference for convenience, low price and rapid delivery accelerate, with mega brands and marketplaces creating new 'norms' in customer expectations cross-industries.

But D2C websites need to go beyond these 'basic' expectations. Our customer research and surveys consistently confirm that shoppers are motivated to spending on brand sites due to a range of additional factors – from wider product ranges, exclusive or personalized products, bundles, and better product information – to pre-ordering options, and immersive experiences. Irrespective of geography, what really matters – and will keep customers coming back – is creating a frictionless experience, weaving the brand cleverly into every touchpoint, but in a way that enhances the ease of the purchasing journey, not detracts from it or hurts performance. We've seen a shift in terms of brands thinking in terms of experience-driven eCommerce right from awareness through to post purchase, for new and returning customers, and it's one that will pay dividends.



**RACHEL SMITH**  
CUSTOMER EXPERIENCE DIRECTOR

There are some countries where brand sites rank even higher than marketplaces – in Australia (23% of all product purchases), France (22%) and Colombia (20%), D2C is the single most popular online channel. In the UK (18%), Brazil (17%), Netherlands (22%) and UAE (19%), it is second.

These numbers are buoyed by some real strength categories. For example, across all markets we surveyed, consumers said they were most likely to buy clothing and fashion items direct from brand sites, which now account for a quarter (23%) of all online clothing sales.

Not all of that success is down to household name brands like Nike.com which can compete with the biggest marketplaces and retailers on recognition and reach. Online fashion retail is characterized by thousands of smaller brands which have been able to successfully transfer the boutique experience online, especially while stores have been shut during the pandemic.

It is important that brands keep these figures in perspective. Despite its second position behind marketplaces in terms of purchase intent, it only claims the sixth largest share of sales online, accounting for 8% of consumer digital spend – behind retailer sites and apps (12%) and aggregator and delivery apps (11%).

And when we asked consumers to rate which online shopping channel gave them the best experience across a range of criteria, D2C only ranked fifth overall with an average score of 6%, well behind Amazon (29%) and other marketplaces (23%), as well as retailer sites (11%).

Brands should be putting all their focus into offering unique, premium experiences that create a clear point of difference between their own D2C channels and the other options available to consumers. So, what can brands do to close this gap? We asked digital shoppers what they wanted to see...

**23%** OF ALL  
ONLINE CLOTHING AND  
FASHION SALES TAKE  
PLACE ON BRANDED  
SITES

## CHAPTER 2: WHAT MAKES CONSUMERS BUY DIRECTLY FROM BRANDS?

If you want a straight answer, you're always best off asking a straight question. So we asked consumers directly – what would encourage you to buy products directly from a brand online?

The first answer was no surprise; 58% said a better price. However, price was mentioned by a much smaller proportion of people than last year, down from 77%, suggesting brands have more scope to compete than just on price alone.

It is clear from the rest of the list how consumers want to be wooed if price is put aside – they are looking for great service. In second place with 51% was free delivery, followed by free returns and then fast and convenient delivery (both with 36%). This goes to prove what we have been talking about for a number of years – the delivery and returns process must be easy, slick, and if possible, free. In other words, service is key.

**51%** OF GLOBAL SHOPPERS SAID THAT FREE DELIVERY WAS A KEY FACTOR IN BUYING DIRECTLY FROM BRANDS

Service is a key word for brands looking to establish and build their D2C proposition in such crowded digital markets. We know that brand loyalty is not what it used to be, and are increasingly seeing “loyalty to service”; one of the reasons marketplaces like Amazon have become so successful is because of their relentless focus on service.

The product offer also has a big role to play. Compared to last year's responses, more consumers this year said they would be tempted to buy from D2C sites by better product information (23% v 16% last year), bundled products (20%) and personalized products (16% v 11%).

In addition, 26% of respondents this year said that a loyalty program would convince them to buy direct from a brand. The benefits of loyalty schemes could be interpreted in two ways – firstly, as consumers looking for additional value from brands (e.g. loyalty discounts), and secondly, the additional level of service that being a member affords consumers, whether it is access to exclusive products, priority purchasing and deliveries, and so on.

To make their D2C channels successful, brands must aim to put service first. Indeed, we can even say they have to make service an integral part of their brand identity.

## WHAT WOULD ENCOURAGE SHOPPERS TO BUY DIRECTLY FROM BRANDS?



Compared to other questions, there was a remarkable degree of consistency in what consumers said would encourage them to buy more from brand sites across all 17 countries we surveyed. There were, however, some clear differences across age groups.

Older shoppers emerged as more price oriented – 63% of 45 to 54-year-olds and 62.9% of over-55s said a better price would persuade them to shop with a brand site, compared with 51% of 16 to 24-year-olds. The oldest age group were also much more strongly against the idea of switching to D2C channels full stop – 16% of over-55s told us nothing would persuade them to shop through a brand site, versus just 4% of 16 to 24-year-olds.

There is also a clear youth slant on the product-related demands mentioned above. 25% of 16 to 24-year-olds and 27% of 25 to 34-year-olds say exclusive products would attract them to a brand site, versus 13% of over-55s. Similarly, 22% of under-35s said they would be interested in bundled product deals, and 19% said they would switch for personalized products, compared with just 10% and 7% respectively among the over-55s.

### CHAPTER 3: WHAT DO SHOPPERS WANT TO CHANGE ABOUT ONLINE SHOPPING?

We also asked consumers what they would change about online shopping. In line with the idea that service is becoming more important, the number one factor globally was faster delivery, which came out on top with 11.2% of votes.

What's clear is that consumers have a very broad and complex range of expectations about what they want from online shopping. To deliver the experience consumers really want, brands have to aim to get all of them right.

**FASTER DELIVERY  
- THE NUMBER ONE  
FACTOR THAT GLOBAL  
CONSUMERS WOULD  
CHANGE ABOUT  
ONLINE SHOPPING**

### WHAT WOULD GLOBAL SHOPPERS CHANGE ABOUT THE ONLINE SHOPPING EXPERIENCE?

11.2%	FASTER DELIVERY
8.1%	FREE RETURNS
7.3%	CREDIBLE REVIEWS AND RATINGS THAT I CAN TRUST
6.7%	I WOULD NOT CHANGE ONE THING ABOUT ONLINE SHOPPING AS A CONSEQUENCE OF MY EXPERIENCE DURING THE COVID-19 OUTBREAK
5.3%	EASY RETURNS
5.0%	FASTER REPLACEMENT OF PRODUCTS THAT ARE OUT OF STOCK
4.8%	BETTER CONTENT (E.G. FULLER DESCRIPTIONS, MORE IMAGERY)
4.7%	BETTER PAYMENT OPTIONS
4.3%	EASIER TO SEARCH FOR AND FIND PRODUCTS
3.8%	BETTER PRODUCT RANGE

## CHAPTER 4: FULFILLMENT

One of the key battlegrounds when it comes to digital commerce is something that is not digital at all – fulfillment – or to put it more plainly, delivery.

What's clear, is that in this new world, consumers want fast delivery! When we asked consumers what they would change about the delivery of products they ordered online, speed came out as the most popular answer, mentioned by 48% of people we spoke to worldwide. This beat cost of delivery (42%) into second place, and more clarity on exact delivery times (41.6%) into third.

According to this year's survey, three-quarters (76%) of online shoppers worldwide say they expect delivery in less than three days, with 46% wanting orders to arrive in two to three days, and just under a third (30%) expecting goods to arrive within 24 hours.

**30% OF GLOBAL SHOPPERS EXPECT THE GOODS THEY ORDER ONLINE TO ARRIVE WITHIN 24 HOURS**

However, data from elsewhere in our survey suggests that consumers are looking for digital brands and retailers to offer a lot more than just the fastest delivery times possible.

In place of speed alone, we are seeing consumers ask for a broader range of

fulfillment options. The differences might be slight, but marginally more shoppers we spoke to ranked convenient delivery as an important purchasing factor (92%), ahead of free delivery (91%) and speed of delivery (90%).

This corresponds to the fact that two in five consumers would prefer to know a precise delivery time, right up there with speed and cost on things they would most like to change.

In Colombia, more than half (54%) want more clarity on delivery times, while in the UK, this was cited by slightly more people than faster delivery – 40% vs 39%.

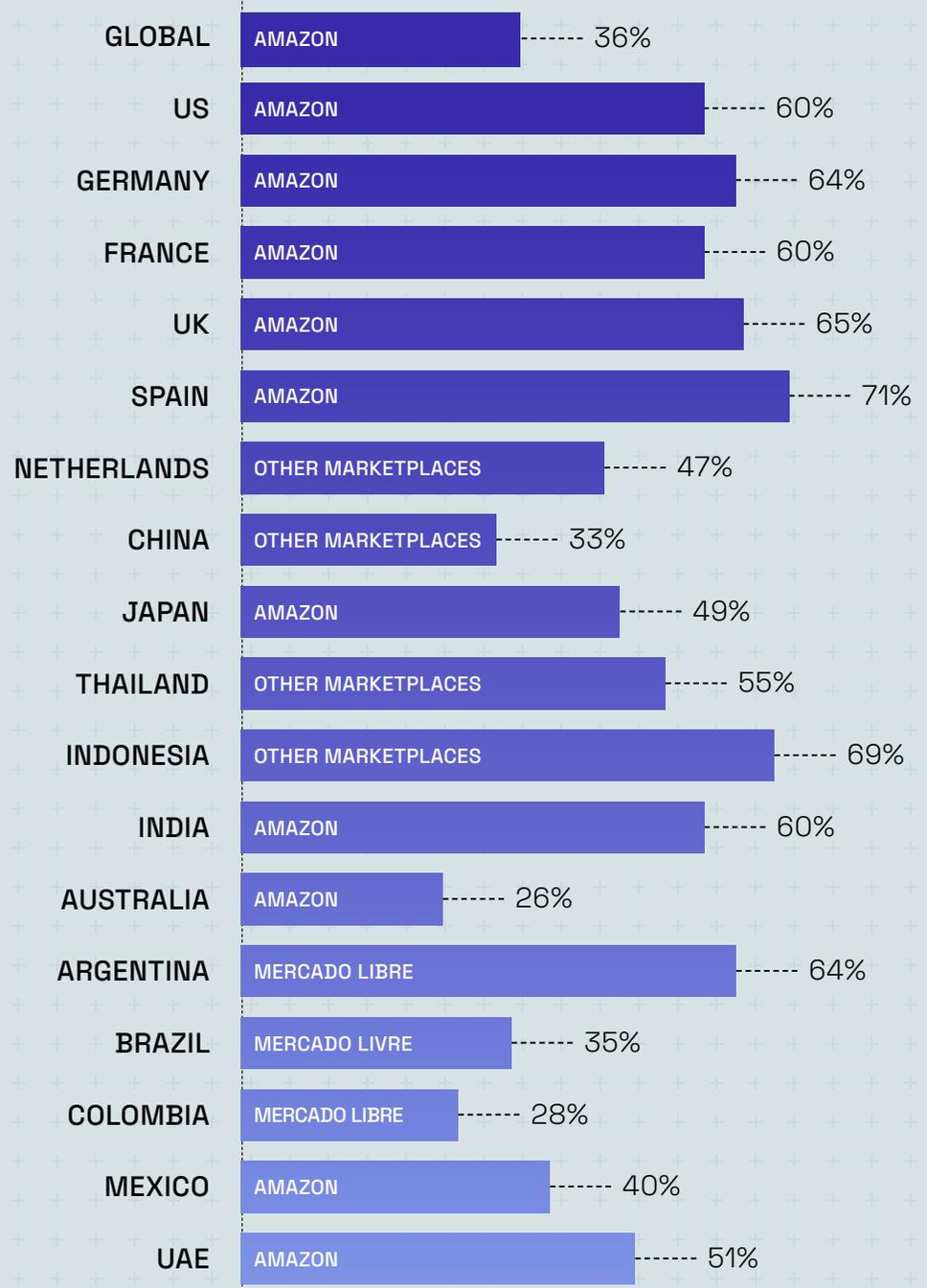
Similarly, nearly a quarter (23%) of online shoppers around the world said they would prefer if deliveries could be made wherever they were (at home, work, while out and about around town, etc.), while 20% said they wanted more options for pick-up.

Some of the shifts in consumer priorities on fulfillment can be directly linked to the COVID-19 experience. Three quarters (75%) said they now rate the availability of no-contact delivery as an important factor in choosing where they buy from online.

And who is best at speedy delivery? The answer is clear; Amazon, with 36% of global shoppers identifying it as the best. Amongst Prime members, it scores even higher, with 66% citing it as best for speed of delivery and 61% for free delivery.

These findings underline just how much work rivals have to do to catch up with Amazon on fulfillment. They also suggest that speed of delivery is the area all digital brands and retailers have to focus on, first and foremost.

## WHO IS BEST AT SPEEDY DELIVERY IN EACH COUNTRY?



## EXPERT OPINION: WHY DIGITIZING PRODUCTS AND SERVICES COULD BE KEY TO FUTURE SUCCESS

In short, if the products or services you sell cannot be digitized, every other aspect of the purchase journey should be. Additionally, consider how you could add digital products to your offer. The meteoric rise of non-fungible tokens, more commonly known as NFTs, has shown there is a huge opportunity for brands to create digital product categories, which can be instantly delivered to consumers, generating valuable new revenue streams that did not exist a short time ago.



**RANDY KOHL**  
HEAD OF MARKETING, GORILLA GROUP,  
A WUNDERMAN THOMPSON COMMERCE COMPANY

## CHAPTER 5: DIGITAL PRODUCTS ARE THE FUTURE

But delivery speed is really only a concern for physical products. Increasingly, we see digital products being bought.

**33% OF ALL PRODUCTS AND SERVICES BOUGHT ONLINE ARE DIGITAL, AND NOT PHYSICAL.**

In this year's survey, consumers globally told us a third (33%) of their online spend now goes on digital services. The figures are fairly consistent across markets and demographics – a quarter (26%) of over-55s, the lowest figure across age groups, say they buy digital services online, while the lowest figure for any country was 21% in Japan, with the highest, 42%, in India.

And when a product is digital and instantly downloadable, the expected “delivery” time is suddenly very different. For a physical product to arrive in just a few hours is nothing short of a miracle, for a digital product to take a few hours to download is unacceptably slow.

In 2020, just over a third (34%) of shoppers told us they would prefer online purchases to be digital and instantly downloadable. This year, the figure increased to 46%.

This rise might partly be explained by the popularity of digital products in markets such as India (78%) and China (71%). The increase can also be attributed to 12-months+ of spending a lot of time at home and the

booming interest in products that consumers can buy and access remotely and instantly, without having to wait for delivery.

Of course, not all products can be ‘digitized’ and many retail categories might argue this is a trend that applies to the likes of the entertainment and tech sectors, and not them! But it lays down a challenge to brands and retailers to think creatively about what they can offer in a digital format, whether they can develop digitized services in place of products, and whether it is something they can use to add value to the overall customer experience or to be monetized directly.

Unsurprisingly, there are some very obvious demographic differences in our survey findings which give businesses a clearer idea of who to target with digital products and services. Just over half (52%) of under-45s said they would prefer instantly downloadable purchases versus just 23% of over-55s.

There is also a clear slant towards men, with 51% saying they'd like more digital products to be available versus 41% of women.

### WHAT PERCENTAGES IN WHICH AGE GROUPS WANT DIGITAL AND INSTANTLY DOWNLOADABLE PRODUCTS?

16-24	40%
25-34	53%
35-44	52%
45-54	39%
55+	23%

## SECTION 3: KEY CONSIDERATIONS & ACTIONS

### GET YOUR D2C OFFERING RIGHT WHEN IT COMES TO TECHNOLOGY.

- Speak to our engineering team about the right technology stack to deliver the experience your customers want.

### DELIVER THE BEST CUSTOMER EXPERIENCE FOR YOUR D2C PLATFORM.

- Our CX consultants – covering UX and UI – can design and build you a best-in-class platform.

### NEED AN APP FOR THAT?

- We can design, build and run this for you too.

### FOCUS ON DELIVERING THE BEST SERVICE TO CONSUMERS, PARTICULARLY THROUGH DELIVERY AND RETURNS

- Speak to our business consultants about investing in and improving your commerce services.

### CONSIDER WHICH PRODUCTS AND SERVICES YOU CAN DIGITIZE.

- Engage with our CX consultants to work out what can be digitized and how.

### CONTINUALLY OPTIMIZE AND IMPROVE PERFORMANCE.

- Our Digital Intelligence team can give you all the data, analytics and testing you need to constantly test, learn and improve.





# SECTION 4: THE RISE AND RISE OF MARKETPLACES

## SECTION 4: THE RISE AND RISE OF MARKETPLACES

In Chapter 2, in discussing where consumers are most likely to make purchases online and which channels have the biggest share of wallet worldwide, we spelled out how one group of platforms reigns supreme in the world of digital commerce – marketplaces.

In previous Future Shopper reports, we've discussed at length Amazon's dominance in many Western markets, why it is so popular with consumers, and what other digital retailers and brands can do to compete.

But once we change our perspective from a Western to a more global viewpoint, it is clear that Amazon is not alone; taken as a whole, marketplaces are where consumers make more than a third of their online purchases (41%).

**41% OF ALL ONLINE SPENDING GLOBALLY IS VIA MARKETPLACES**

But considering the affirmation of the marketplace model we've seen in this year's survey results, it seems more important than ever to look at why marketplaces click so well with consumers.

### CHAPTER 1: AMAZON STILL SETS THE STANDARD

As part of our Future Shopper survey, we ask consumers every year to rate the experience they get across different channels according to a range of factors – best price, delivery, quality of service, product descriptions, online content and so on.

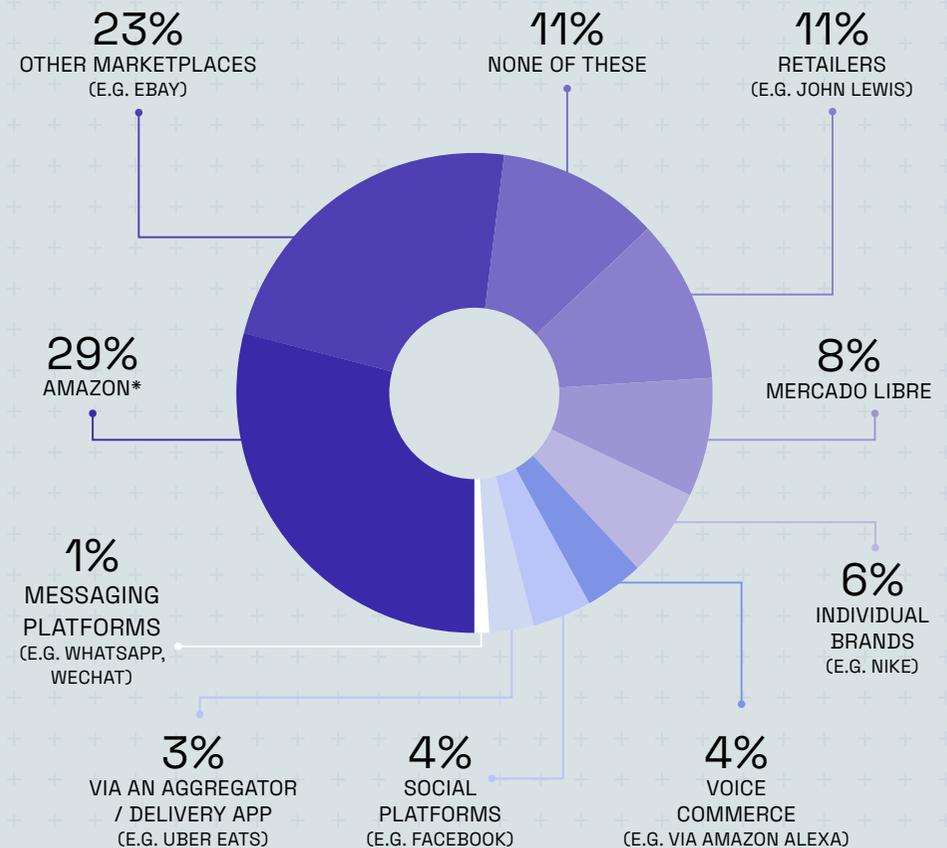
Even with the extended scope of the survey across 17 different countries, Amazon still came top of every single category we quizzed shoppers on – a real testament to the standing that Amazon has with consumers, and the quality of the experience it provides.

Overall, the average percentage of people rating Amazon as delivering the best experience across all categories was 29% – way out in front of other marketplaces (23%) in second.

There are some important regional variations to note as we delve deeper into these numbers. On price, for example, Amazon's reputation looks next to unbeatable in markets such as the US, UAE and India, where more than half of consumers rate it as the best value channel.

But across Asia as a whole, Amazon's reputation on price is comparatively poor – just 20% of shoppers say it provides best value, compared to 48% who identify the other marketplaces as being best – Tmall, Taobao, Lazada.

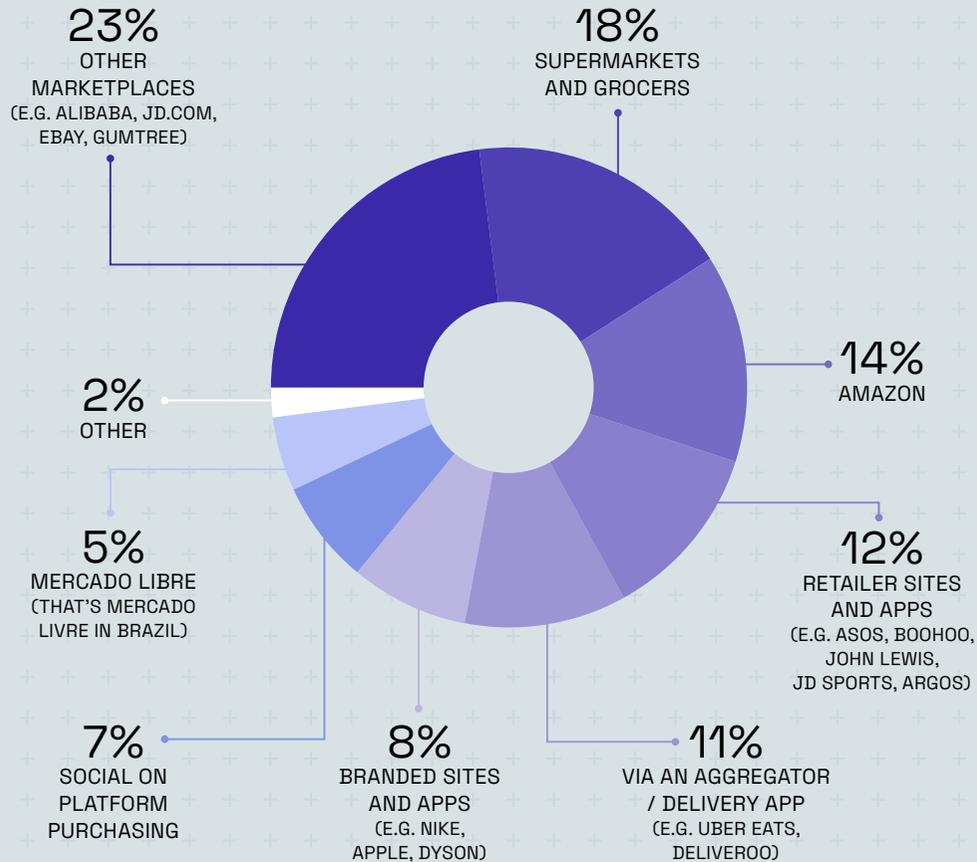
### WHICH CHANNELS ARE SEEN AS GIVING THE BEST CUSTOMER EXPERIENCE?



\*Global figures for Amazon did not include the UAE

**29% OF GLOBAL SHOPPERS BELIEVE THAT AMAZON OFFERS THE BEST CUSTOMER EXPERIENCE, PUTTING IT IN THE NUMBER ONE SPOT**

## WHAT PERCENTAGE OF GLOBAL ONLINE SHOPPING GOES THROUGH EACH CHANNEL?



The pattern we see, then, is that in countries where Amazon is most established – the US, most of Europe, India, Argentina, UAE – it is streets ahead of the competition in how customers rate the service and experience they get. Likewise, in regions where other marketplaces are dominant, for instance, in Colombia, China and especially Indonesia and Thailand, these channels win the approval of local consumers hands down.

Perhaps the most interesting results are therefore from countries like Japan, Mexico and Brazil, where Amazon and other

marketplaces are most evenly matched. In Mexico, for example, Mercado Libre has a 16% share of digital spend, Amazon 15% and other marketplaces 14%. In Brazil, the figures are an 18% share for other marketplaces, 16% for Mercado Libre (known as Mercado Livre locally), and 9% for Amazon. Undoubtedly, the rapid growth of Mercado Pago, Mercado Libre's virtual wallet and financial platform, has helped strengthen the latter's position in Latin America. In Japan, consumers spend 45% of their money online through other marketplaces, and 24% through Amazon.

## DID YOU KNOW:

In Asia, Amazon lags behind the likes of Tmall, Taobao and Lazada in terms of consumers' perception of offering the best price.

In fact, shoppers in the APAC region, led by China, Thailand and Indonesia, rated these marketplaces as offering **the best experience in all 12 categories** we quizzed them about.



IMAGE COURTESY OF TWAALL

What becomes clear looking at the data across these countries where competition between rival marketplaces is tightest is just how well Amazon performs in consumers' eyes on delivery. 49% of shoppers in Japan rate Amazon the best platform for speed of delivery, and 47% for free delivery – well ahead of all other channels, despite Japanese consumers spending nearly twice as much through other marketplaces.

In Mexico, 40% of shoppers rate Amazon as best for speed of delivery, and 35% say it is best for free delivery, top in both cases. In Brazil, Amazon is rated second behind Mercado Livre on both counts, again ahead of other marketplaces, even though Brazilian shoppers spend double through those channels, than what they do through Amazon.

An obvious inference here is that Amazon's reputation on delivery is built on Prime, the super-charged membership scheme that pioneered next-day delivery for no extra charge (although Prime membership is, of course, a paid-for service).

There are regional variations, of course. But excluding places like Indonesia, where Prime is not available, the Netherlands is the only country we surveyed where less than half of consumers (35%) said they wanted to see more Prime-like services from other brands and retailers. At the other end of the scale, an overwhelming 88% of digital shoppers in Thailand want more services like Lazada, with 84% in LATAM relating to Mercado Libre.

We got a further indication of why marketplaces are so popular. For some consumers, the concept of buying everything through one retailer might not be ideal, however, to the vast majority, buying everything they need online through a single retailer is actually preferable.

Nearly two-thirds (64%) said they were excited by this prospect. Only in the Netherlands again (34%) and Australia (47%) were the numbers who agreed with this in the minority, as were those aged 55 or over (41%).

**64% OF GLOBAL SHOPPERS SAY THAT THEY ARE EXCITED BY THE PROSPECT OF BUYING EVERYTHING THROUGH ONE RETAILER**

This neatly sums up the appeal of marketplaces – for a majority of consumers, they represent the ultimate one-stop retail experience, providing convenience, value, high levels of service, and a short, seamless journey through to final purchase. Marketplaces have successfully conquered what we might call 'traditional' online commerce. But as we will now see, their ambitions don't stop there by any means.

## CHAPTER 2: AMAZON EXPANDS ITS REACH

As we saw earlier in the report, just under half of consumers now say they have bought digital or downloadable products. With its Kindle ebooks, Audible audio books, Amazon Music and Prime Video brands, Amazon is a recognized leader in this category, drawing undoubtedly on its origins in books and entertainment retail. Worldwide, Amazon accounts for just over a quarter (28%) of all online entertainment purchases, its biggest share of any single category.

Amazon is just as active in making the transition to selling digital services online as it is digitized products. There are clear synergies here; in line with modern technological advances, Amazon Music and Prime Video are, these days, more recognizable as streaming services than they are download stores.

Amazon's ambitions to extend its digital service offering is clear. Through Prime Video, it has become a key figure in the lucrative sports broadcasting market, rivaling incumbent media companies with big-money rights purchases and largely pay-per-view packages.

**40% OF GLOBAL SHOPPERS SAID THEY WERE IMPRESSED WITH AMAZON PRIME'S COVERAGE OF SPORTS**

40% of participants in this year's Future Shopper survey said they were impressed with Prime Video's coverage of sports, slanted towards younger viewers, with 45% of under-45s saying they liked watching sport on Prime Video compared to just 17% of over-55s.

As well as positioning itself as a major broadcast media player, Amazon also has eyes on the financial services industry. More than half (54%) of consumers we spoke to said they would be open to banking through it (likewise Mercado Libre or Lazada in their respective markets); with nearly half (48%) open to its other financial products.

**56% OF US SHOPPERS SAID THEY WOULD BE OPEN TO BANKING WITH AMAZON**

The idea of Amazon as a financial provider is particularly popular in China, where three-quarters of people said they would consider banking and buying financial products from the marketplace (76% and 75% respectively).

Given Amazon's relatively low penetration in the retail markets of these two countries, compared to other marketplaces like the Alibaba conglomerate, financial services could well be part of Amazon's strategy to extend its global reach, as well as push into new verticals where it is already a dominant force in digital commerce.

### DID YOU KNOW:

**Asian consumers are most open to using Amazon for financial services.** This is likely to be because they are already accustomed to marketplaces and businesses like Alibaba providing them with payment services.

## CHAPTER 3: LOYALTY AND THE PRIME EFFECT

We've already touched on Prime's reputation as an exemplar of the kinds of experiences and levels of service consumers around the world demand, even in countries where Amazon itself is not such a dominant force.

Prime's influence is best understood as part of the wider phenomenon of loyalty schemes.

Yes, there are things that distinguish Prime from what we might call 'traditional' retail loyalty schemes – the fact that you pay for it, for one, which crosses over into the premium membership category, and the fact that it is service rather than rewards-oriented.

But Prime is perhaps the best example of how consumer loyalty has shifted away from brand towards service in the digital era. Put simply, if you want to retain customers these days, you have to give something tangible back. But if you get that right, Prime's impact shows that the results can be stratospheric.

Nearly three-quarters (72%) of consumers we spoke to in our research said the availability of a loyalty scheme influenced who they chose to purchase from. The fact that this figure is driven by younger consumers tells us that this is a trend we can expect to see for years to come – just 56% of over-55s said it played a role in their purchasing decisions.

**86% THE PERCENTAGE OF GLOBAL SHOPPERS WHO ARE PART OF A LOYALTY SCHEME**

Across the board, the number of people saying they belonged to loyalty schemes is 86%.

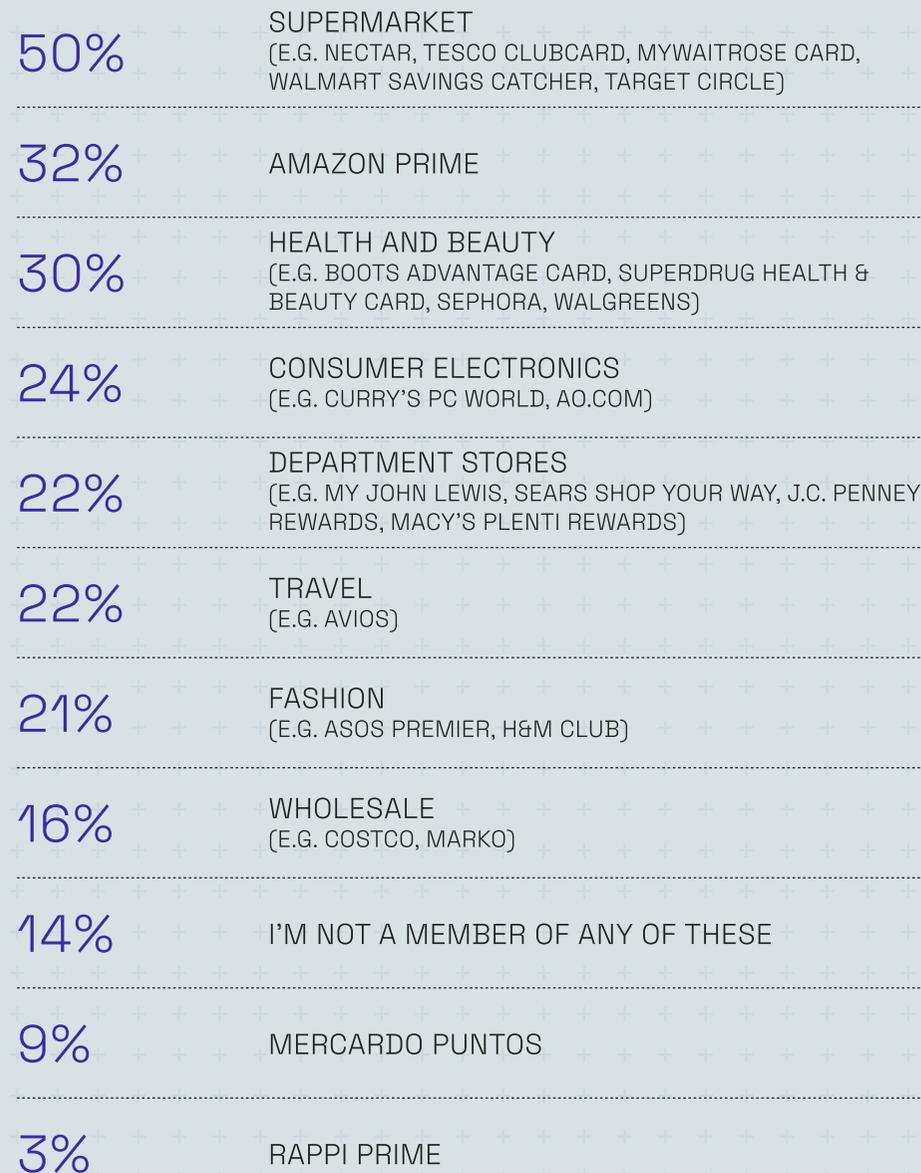
As with last year's results, grocery and supermarket loyalty programs were the most popular, with half (50%) of the shoppers we spoke to this year saying they are a member of one.

Supermarket schemes rank as the most popular type of loyalty program in Australia (70%), the UK (70%), France (62%), Thailand (61%), the Netherlands (59%), UAE (54%), Colombia (52%), China (52%) and Germany (46%).

**32% OF GLOBAL SHOPPERS SURVEYED SAY THEY ARE A PRIME MEMBER**

Worldwide, 32% of consumers surveyed this year said they were Amazon Prime members, and despite its strength, we actually saw falls in Prime membership in some notable Amazon strongholds such as Spain (60% of online shoppers said they were Prime members this year versus 71% in 2020) and the US (59% this year versus 70% last).

## THE MOST POPULAR LOYALTY SCHEMES GLOBALLY



## HOW BEING A PRIME MEMBER CHANGES PERCEPTION OF AMAZON AND ITS SERVICES:

What we see consistently across our survey data is that Prime members are much more positive about Amazon across a range of metrics. What this tells us is that Prime conditions them to engage with Amazon even more – one of the key reasons Amazon pushes Prime membership so strongly. Prime members also spend more and more often, and we call this the ‘Prime Effect’.

Most notably, in Section 1 of this chapter we saw how Amazon topped the rankings for providing the best experience on every category we quizzed consumers about. This is driven by the positive opinions Prime members have about the service they get.

In five categories – speed of delivery, free delivery, ease of finding a product, stock availability and ease of the returns process – we saw swings of 30% and more between the numbers of Prime members

rating Amazon as the best and non-Prime members. The swing was over 25% in another six categories.

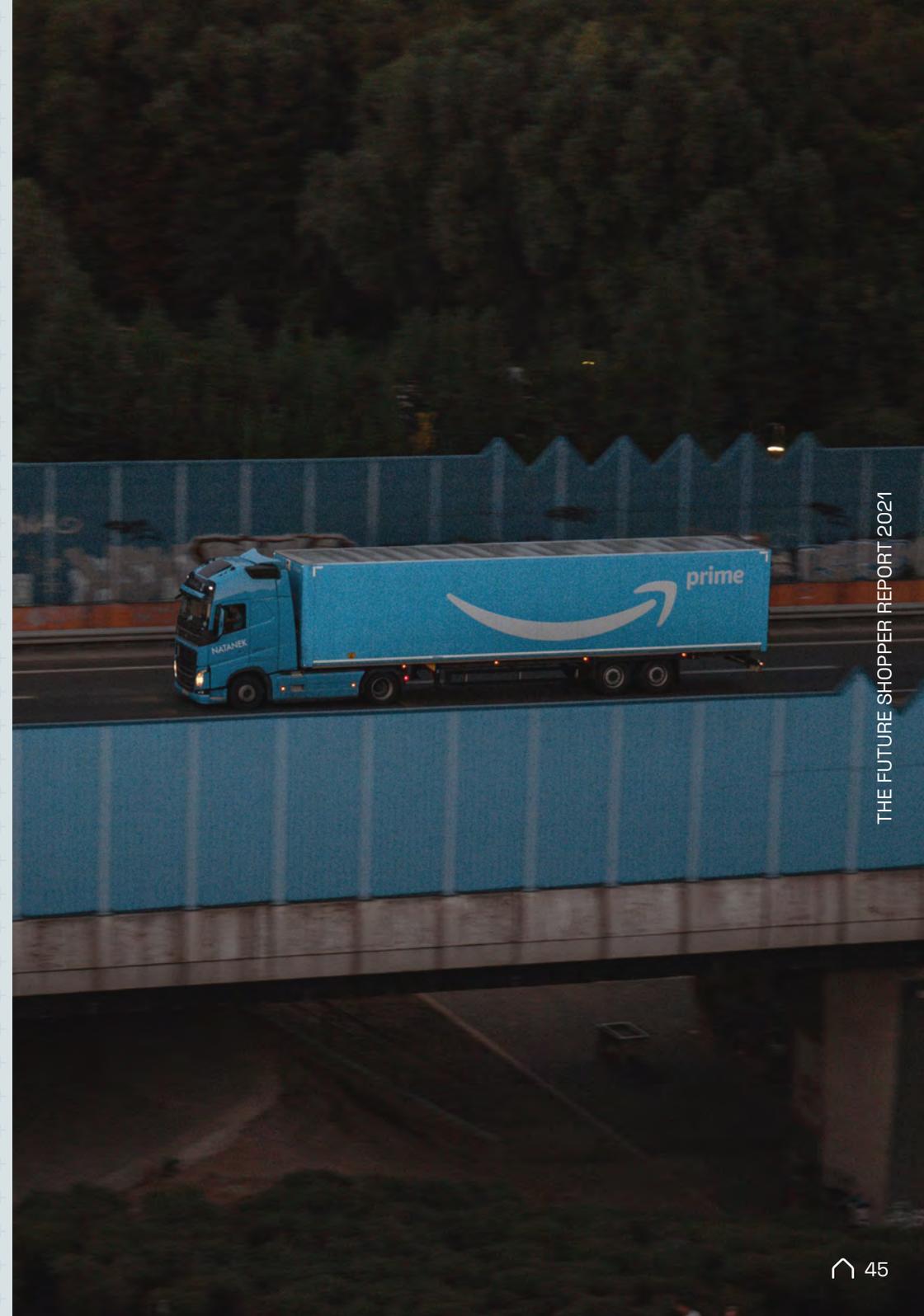
Take Prime membership out of the equation, and there is little to choose between the quality of experience consumers feel they get through Amazon and other marketplaces. Prime literally locks consumers into a passionate sense of loyalty to the experience they are provided.

This translates directly to the bottom line. Prime users make double the average number of purchases per month from Amazon than non-Prime members do – 6.63 versus 3.45. This means the Prime members are buying through Amazon as regularly as all consumers buy through supermarkets and grocers, the most frequently used channel overall.

We should also remember that Prime members are paying for the privilege of all of this, and are more than happy to do so. Nearly four in five Prime members (79%) say Prime is good value for money. Arguably even better news for Amazon is the fact that half (50%) of non-Prime members think it sounds like good value, too.

**79% OF PRIME MEMBERS BELIEVE THAT PRIME IS GOOD VALUE FOR MONEY**

	non-prime	prime
AMAZON IS BEST FOR PRICE	22%	50%
AMAZON IS THE BEST AT SPEEDY DELIVERY	28%	66%
AMAZON IS THE BEST WHEN IT COMES TO RETURNS	21%	51%
AMAZON IS THE BEST AT CUSTOMER SERVICE	21%	49%





## CHAPTER 4: AMAZON MAY DOMINATE BUT THEY AND OTHER MARKETPLACES ARE NOT UNBEATABLE

The reputation, reach and ambition of Amazon and the like can be daunting for other brands and retailers. But when we take a broad view across global markets and all commerce categories, it's clear that their size and dominance is still a long way off amounting to a monopoly.

The expanded global survey we have undertaken for this year's Future Shopper report has given us insight into markets where Amazon is not the biggest fish. Indeed, in a number of these, such as Indonesia, Thailand, Brazil, Argentina, Japan and China, it is other marketplaces which take the biggest share of purchases across all categories combined.

In the APAC region, for example, marketplaces other than Amazon account for a third (33%) of all purchases, led by Japan where the figure is a massive 45% and Thailand (41%). These figures are far bigger than Amazon's biggest share in any single country – 33% of all sales in Germany.

By contrast, the Netherlands shows the lowest share of Amazon sales with just 5%, compared with 34% that goes through other marketplaces including Bol.com, the largest in its market. However, with Amazon launching in the Netherlands just last year, we can expect a continuous re-rating as it establishes itself.

With respect to Latin America, Mercado Libre commands the highest share of overall online sales (19%) – and is almost as large as all other marketplaces including Amazon combined (20%).

Combined with how other marketplaces dominate shoppers' perceptions of where they get the best online experience across most of Asia (India being the big exception), it shows that no truly global digital commerce strategy can afford to fixate on Amazon alone.

Similarly, in certain nations, marketplaces don't come out on top at all in terms of purchase intent. In Australia, for example, brand sites (23%) and retailer sites (20%) take the biggest share. This is also true of the Netherlands (23% retailer sites, 22% brand sites) and Colombia (20% brand sites, 19% retailer sites). Brand sites are also the most popular channel in France, accounting for 22% of purchase intent across all categories, with Amazon in second (19%).

We've already touched on how Amazon is far from dominant across all categories as well, with clothing and grocery key areas of challenge. We recently commented on Amazon's ongoing attempts to make a significant mark in clothing retail in our report '[Fighting For The Future Of Fashion](#)', and Amazon has invested heavily in its grocery offer, both in rolling out the futuristic Amazon Go no-checkout store concept and in more conventional grocery deliveries. Yet two-thirds (65%) of consumers we spoke to said they would rather go to the supermarket or order their groceries online from a supermarket than through Amazon. Clearly Amazon still has a lot of work to do here.

These figures give the rest of the retail ecosystem hope. To capitalize on the spaces left between Amazon and other marketplaces, it is important that brands and retailers understand where consumers would like to see an alternative provided – what is often referred to as What Amazon Can't Do, aka #WACD.

**65% OF GLOBAL SHOPPERS SAID THEY WOULD RATHER GO TO THE SUPERMARKET OR ORDER THEIR GROCERIES ONLINE THROUGH ONE RATHER THAN VIA AMAZON**

When we asked the main reasons why consumers would choose another online retailer over Mercado Libre, Amazon or Lazada, as expected, cheaper pricing came out as the most popular answer, cited by 46% of respondents. But this is significantly lower than the 68% score we got in last year's survey, relating specifically to Amazon.

Interestingly, price is much less likely to tempt consumers away from Amazon in the world's three biggest consumer markets – China (37%), India (33%) and the US (33%). Younger shoppers are much less concerned with lower prices than older, too. While half of shoppers aged 45 or over (50% of 45 to

54-year-olds, 49% of over-55s) cited price, this fell to just 39% of 16 to 24-year-olds.

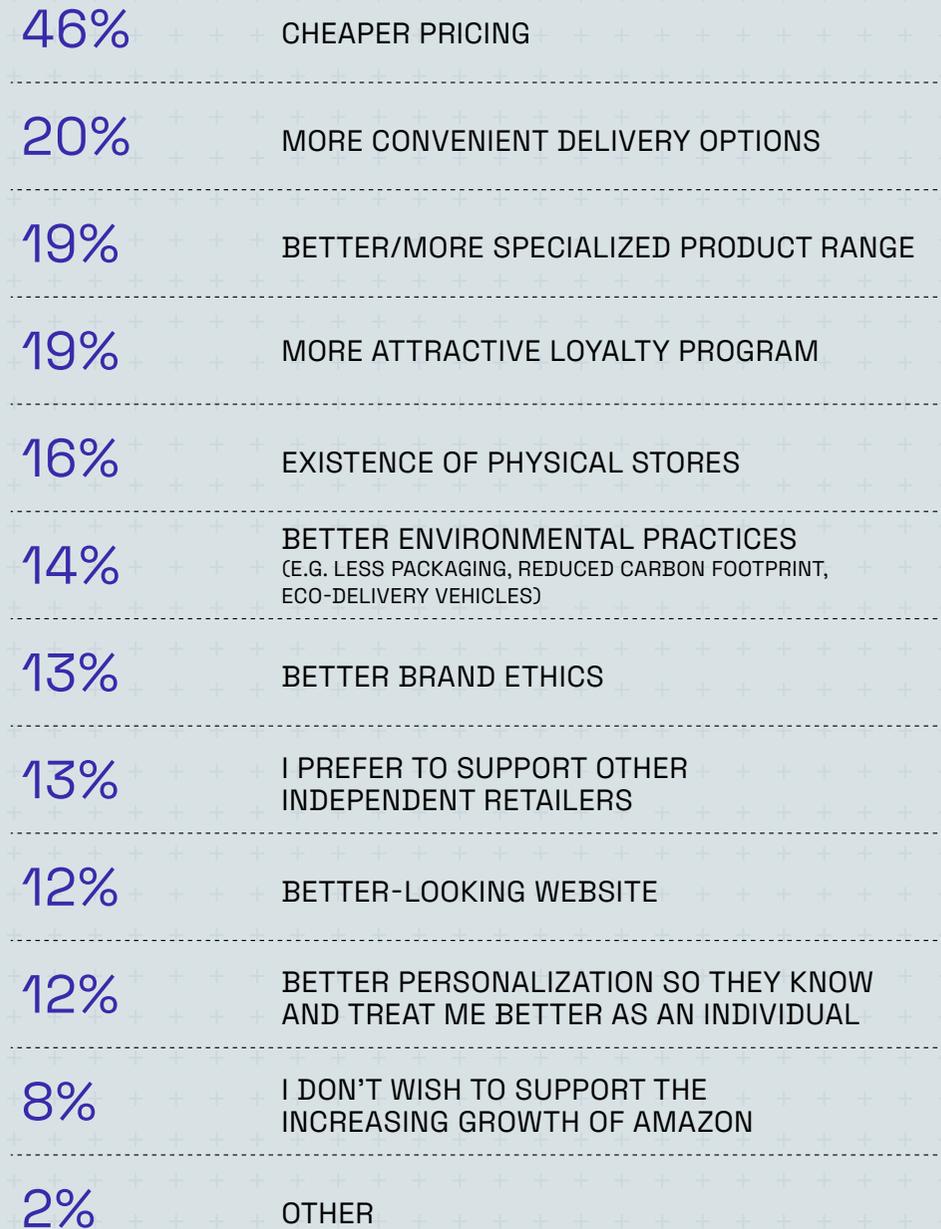
This is good news for businesses that might balk at the idea of trying to compete with companies with the buying power of Amazon on price. As we saw when we asked what would attract consumers to use D2C channels more, they are looking for more than better value alone.

This gives brands and retailers scope to create unique, niche offers that fill the gaps where marketplaces don't always deliver. Intriguingly, the next most popular answer on what would attract shoppers away from their preferred marketplace was, in fact, more convenient delivery options, mentioned by 20% of consumers worldwide. So, even though, for instance, Amazon, largely through its Prime offer, is widely viewed as setting the agenda on delivery, for consumers there is always room for improvement.

Equally fascinating is the fact that 19% of people say a more attractive loyalty program would make them look elsewhere – remember, even half of non-Prime members rate Amazon's flagship loyalty-membership super program as a good value deal!

Elsewhere, we see factors like a better or more specialized product range (19%), better personalization (12%, but something shoppers in China and Thailand are particularly keen on, with figures of 23% and 31% respectively), and the existence of a physical store (16%) – something Amazon as yet has not realized at scale – and bringing us back to the desire for omni-channel offers.

## WHY WOULD GLOBAL SHOPPERS SELECT ANOTHER RETAILER OVER THEIR CHOSEN MARKETPLACE



Another thread to this is consumers' feelings about having organizations the size of Amazon dominating the retail landscape. Worldwide, half (49%) of online shoppers we spoke to said this worried them. 13% said a preference to support independent retailers would make them avoid shopping through Amazon and other dominant marketplaces. This then leads onto questions of brand values and ethics, with 14% saying they would spurn Amazon and the like to shop with companies that demonstrate better environmental practices, and 13% looking for better brand ethics.

Does Amazon have any issues with its brand image on ethics and trust? There is a mixed picture here. More than half (56%) of consumers support the idea of Amazon paying more taxes, suggesting a niggling PR issue for it to deal with. Feelings on this are particularly high in the US (70%), the UK (69%) and China (68%).

**56% OF GLOBAL SHOPPERS SAY THAT THEY WANT AMAZON TO PAY MORE TAXES**

When we asked our survey participants which of a series of statements applies when they buy from Amazon or their regionally dominant marketplace, trust actually emerges as a strong suit. The top two responses were that shoppers trusted products on these platforms to be what they say they are (mentioned by 39%) and trusting reviews (38%).

On the flipside, one in five (21%) said they had encountered reviews they suspected were fake, and 18% said they had come across products they thought might be counterfeit. In addition, consumers seem to have particular issues with sponsored items, with 21% saying they get in the way of what they are looking for (reaching as high as 36% in India) and 20% questioning the credibility of sponsored items (again, reaching 30% in India).

**22% OF 16 TO 24-YEAR-OLDS HAVE COME ACROSS SUSPECTED FAKE GOODS ON AMAZON**

Overall, younger shoppers are more mistrustful of products sold on Amazon and the like than older shoppers. Just a third (35%) of 16 to 24-year-olds said they trusted products listed on these platforms to be what they say they are, compared to a high 41% of 45 to 54-year-olds. Even more significantly, 22% of the youngest age group and 21% of 24 to 35-year-olds said they had come across suspected fake goods on leading marketplaces, versus just 8% of over-55s.

However, this is flipped around significantly on reviews. 40% of 16 to 24-year-olds and 43% of 25 to 34-year-olds said they trusted Amazon reviews, compared with just 22% of over-55s.



# EXPERT OPINION: IS AMAZON UNBEATABLE? THE CASES FOR AND AGAINST

## THE CASE FOR

Amazon is beatable so long as you don't try to out-Amazon Amazon! As our findings suggest, there is truly an opportunity for brands and manufacturers to entice customers away from the temptation to shop with Amazon. We can see this from brands such as Nike and ASOS which have fashioned their own niche and are doing very well outside the Seattle giant's platform.

Exactly how brands can do this varies from category to category – for example, luxury fashion is a sector that Amazon is heavily investing in, but luxury brands are best placed to create the experience that reflects their brand on their own channels, such as their branded websites.

In other categories, convenience plays an important role. As our research shows, offering a range of delivery options is important to customers – and 1 in 5 shoppers think there are better options than Amazon.

I'd really encourage brands and retailers to take a considered approach to their consumer value proposition – what are the reasons that a consumer would shop with them instead of Amazon, given Amazon's dominance? Each brand and retailer can play to their own strengths, whether that be through offering exclusive products, incentivizing consumers through loyalty and rewards, or creating an experience that is engaging, inspiring and informative.



**SHALINA GANATRA**  
SENIOR CLIENT CONSULTANT

## THE CASE AGAINST

Whilst Amazon continually evolves, putting consumers at the heart of every decision, capturing a greater share of consumer searches and using data to improve personalization, it's hard to see how they can be beaten. To use a quote from Jeff Bezos: "Our customers are loyal to us right up until the second somebody offers them a better service." And for now that seems to be a long way away....

With Amazon capturing the eCommerce searches of 63% of consumers, and a greater share of eCommerce wallets, it's difficult to see how brands and manufacturers can ignore Amazon. With increased loyalty through Prime, greater assortment of products, and more delivery options including same day, Amazon has continually raised the bar which many brands, manufacturers and retailers have found challenging to reach.

Amazon can offer significant rewards for brands and manufacturers that understand how to work with this eCommerce giant. However, this requires a carefully worked through balanced channel strategy which should help brands drive incremental revenue.

Many of Amazon's competitors have struggled to keep pace with Amazon as it continually challenges itself to improve the consumer experience. In my view, it's difficult to see, in the current climate, how Amazon could be beaten, and brands should try and determine how Amazon would fit into their channel strategy in a way that helps them improve their overall offering.

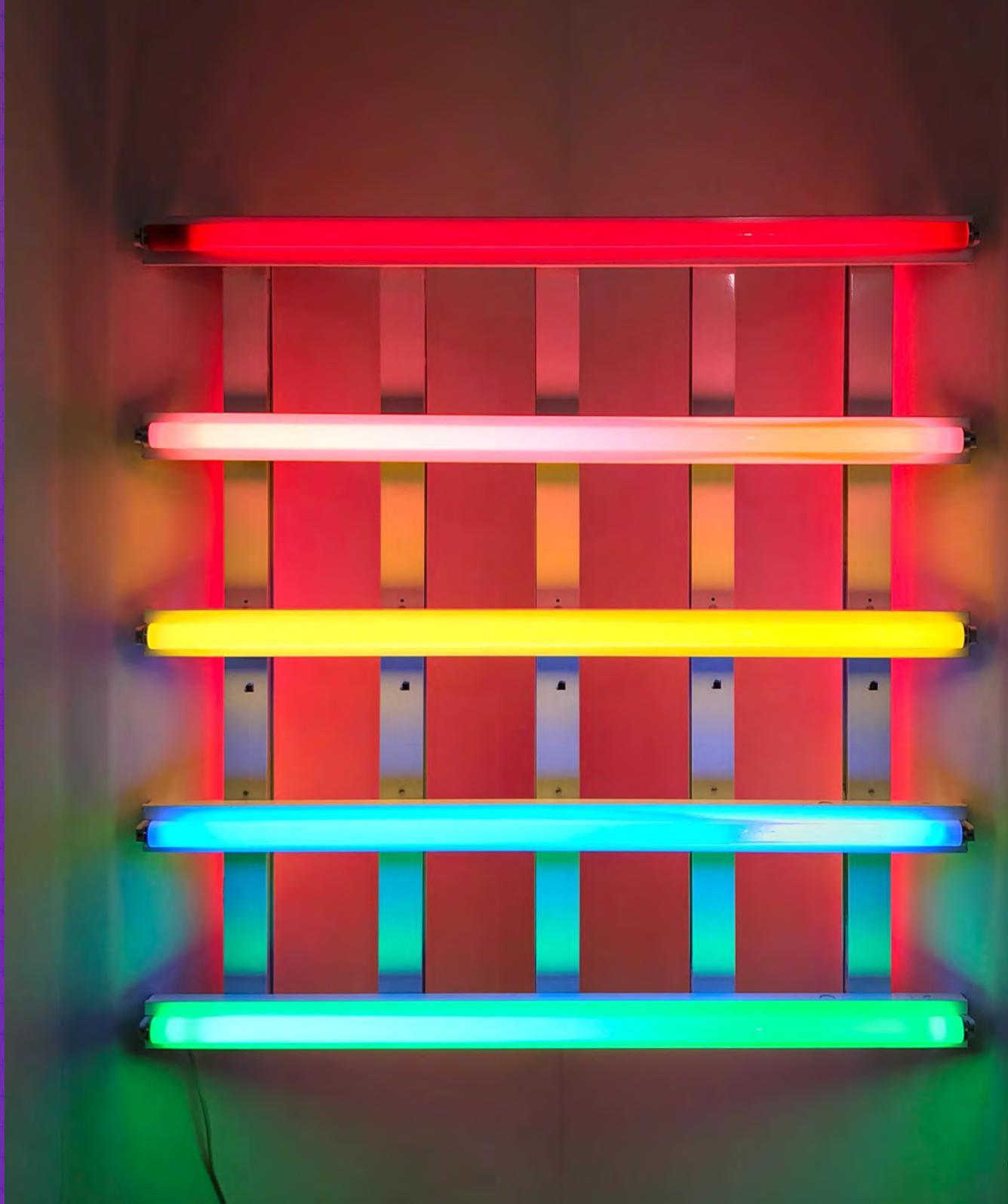


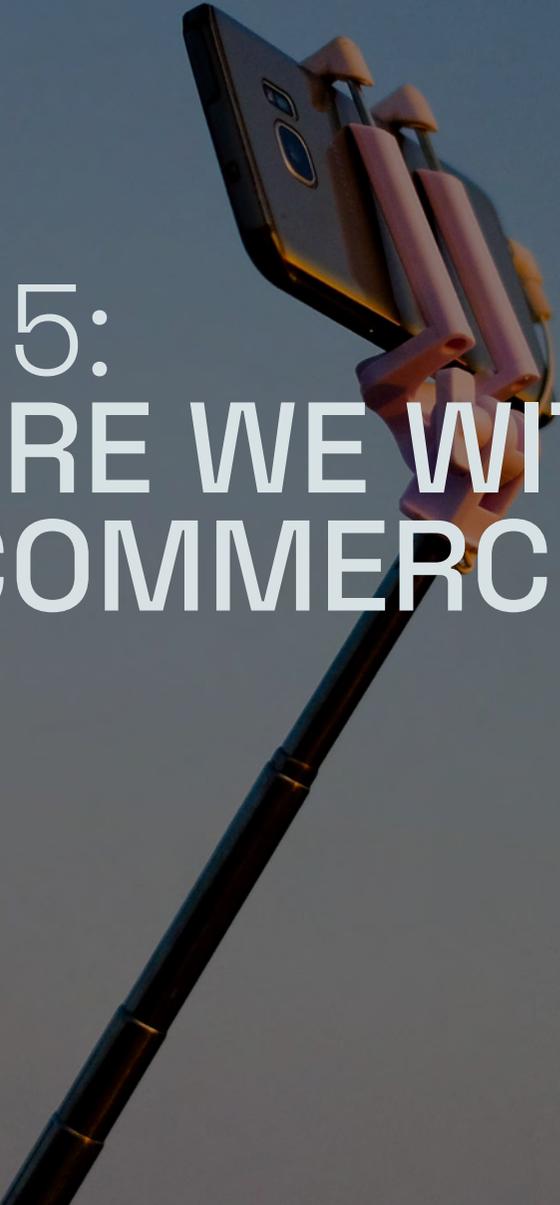
**RAGHBIR RANA**  
MARKETPLACE ENABLEMENT EU LEAD

## SECTION 4: KEY CONSIDERATIONS & ACTIONS

### ENSURE YOUR INTERNATIONAL MARKETPLACE STRATEGY IS FIT FOR PURPOSE.

- In EMEA and the US, talk to our Amazon experts from our Amazon Center of Excellence about how to optimize Amazon sales and performance.
- In APAC, our dedicated marketplace consultants can help you design and deploy the right strategy, for the right platform, in the right country, and can run specific marketplace campaigns for you.
- In LATAM, our Mercado Libre and other marketplace experts can help you get your strategy, execution and campaigns designed and primed for the right platforms.



A smartphone is mounted on a black selfie stick, angled upwards against a clear blue sky. The phone is held in a purple and pink grip. The text 'SECTION 5: WHERE ARE WE WITH SOCIAL COMMERCE?' is overlaid in white, bold, sans-serif font on the left side of the image.

# SECTION 5: WHERE ARE WE WITH SOCIAL COMMERCE?

## SECTION 5: WHERE ARE WE WITH SOCIAL COMMERCE?

Social media has been a channel to watch in digital commerce for a number of years now. We've already seen continued evidence of its rise in this year's survey results, with large numbers of consumers across Asia, Latin America, the US and Australia now using social as their channel of choice for inspiration and search.

At Wunderman Thompson Commerce, we have been advising clients for a number of years to get ahead with a social strategy, not just for marketing and engaging with customers, but for selling directly through the platforms, too.

The big attraction of social is, of course, market reach. With a user base counted in the billions, the Facebook group of platforms (which includes Instagram and WhatsApp) is big enough to make even Amazon envious.

The aspirations of Facebook and other social media companies to get a foothold in digital commerce are no secret, and a number now have well-established channels ranging from marketplace-type offers to on-platform D2C brand offers. But how far off are we from seeing consumers buy through social as readily as many are using it to get ideas and look for products?

### CHAPTER 1: ARE CONSUMERS SWITCHED ON TO SOCIAL COMMERCE?

A big finding from this year's survey is that 44% of all consumers we spoke to say they have bought from a social platform. This figure would be above 50% if it wasn't for low

penetration in Europe, where the figure was just 22%, and lowest of all Japan at 12%.

**44% OF GLOBAL SHOPPERS SAY THAT THEY HAVE ALREADY BOUGHT FROM A SOCIAL PLATFORM**

Elsewhere in Asia, buying directly through social media is already clearly a well-established trend, led by Thailand where 74% of consumers said they had purchased from a social platform, followed closely by Indonesia (69%) and China (69%). The figures were also notably high in Colombia, Mexico, India, UAE and the US. Brazil too scored a notable 55%, and we can expect this to rise with the high popularity of WhatsApp as a sales platform for retailers in Brazil, a country which is also acting as the global pilot for WhatsApp Pay.

In addition, 24% of survey participants worldwide said they have followed links or adverts from social media and purchased from the retailer or brand site it takes them to.

Our data shows a significant age gap worldwide between those who are switched on to social commerce and those who are not. The fact that 74% of over-55s, and 52% of 45 to 54-year-olds told us they have never bought directly from a social platform is in sharp contrast to the 55% of 25 to 34-year-olds, 50% of 35 to 44-year-olds and 49% of 16 to 24-year-olds who say they have.



Interestingly, while the youngest 16 to 24-year-old group sit slightly below Millennials and Gen Xers on buying directly through social platforms, they top the age groups for making purchases by following links from social, with 32%. Overall, fewer under-35s say they have not yet engaged with social commerce (26%) than any other age group.

We should be wary of saying that digital commerce is a young person's game, but to a certain extent, social commerce clearly is. And that tells us it is a trend that is only going to grow and grow.

Confirming this, 56% of online shoppers we spoke to said they intended to shop more through social platforms in the future. Again, the generation divide is significant – 65% of under-44s said they plan to use social to shop more, versus just 20% of over-55s.

**56% OF GLOBAL SHOPPERS SAY THEY INTEND TO SHOP MORE THROUGH SOCIAL PLATFORMS IN THE FUTURE**

This question also revealed similar regional differences. Across Latin America, 81% intend to shop more through social, with similarly high figures in Thailand (88%), China (80%) and India (78%). Again, the region where consumers are less enthusiastic about social commerce is Europe, where 70% said they don't intend to shop more through social in the future. With Germany having the highest disagree percentage in the world at 81%.

A lower level of engagement with social commerce in Europe presents a challenge for brands and retailers in those countries. There is an obvious argument that, as the trend really takes off in places like Asia, Latin America and perhaps most significantly the US, it will eventually filter through to European audiences, especially among younger shoppers. However, as an indication of the size of the challenge, an average 40% of consumers across the UK (37%), France (32%), the Netherlands (45%) and Germany (46%) said nothing would convince them to buy more through social media in the future.

In terms of what would persuade shoppers to engage with social commerce more, predictably deals and discounts came top with mentions by 37% of consumers we spoke to. But other ideas make for interesting reading for any business looking to fine-tune its social strategy.

## DID YOU KNOW:

**In Latin America and Asia, shoppers are more positive about using social commerce than in Europe.**

## WHAT WOULD MAKE SHOPPERS USE SOCIAL COMMERCE MORE?



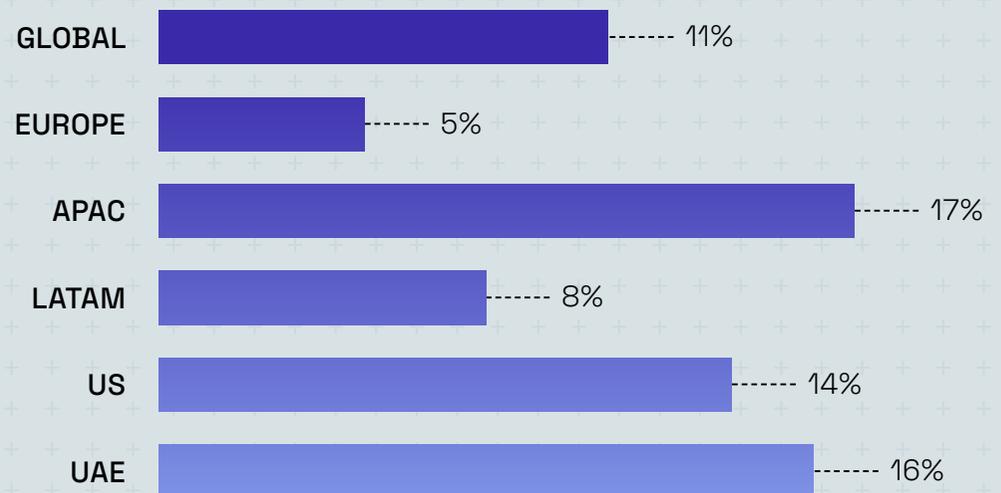
In second place, 31% pointed to the ease of purchasing, suggesting that consumers don't yet see social commerce as being as frictionless as they would like. It would be too easy for brands and retailers to push that aside as one for the platforms themselves to fix. Sellers need to have clear strategies for optimizing the customer journey through social, including how it fits with the rest of their digital channels.

Some other interesting feedback from customers includes the fact that 24% of shoppers would like to see more customer reviews on social. Social media is, after all, meant to be the channel for peer-to-peer recommendations and genuine customer endorsements. This figure suggests brands and retailers aren't doing enough to leverage it, however.

On a similar theme, 23% of people said they would buy more through social if they could see products on real customers – a nod to the popularity of buying apparel via social channels, but by extension, an indication that consumers would like more opportunities to see genuine customers using products as an extension of user feedback and reviews.

Video would be a natural medium for this and ties in directly with the influencer and recommendations phenomenon which we will discuss in more depth shortly. We also saw, in certain countries especially, consumer interest in leveraging the immediacy of livestream video for the likes of influencer events or sales and service calls with agents. In Thailand, for example, 28% of shoppers said more livestream commerce would encourage them to buy through social more, with 26% of consumers in China in agreement.

## GLOBAL CONSUMER APPETITE FOR LIVESTREAM COMMERCE (VIA INFLUENCER STREAMS & VIDEO CALLS WITH SALES ASSISTANTS)



## EXPERT OPINION: WHY THE WORLD SHOULD LEARN FROM THE EXPLOSION OF LIVESTREAM COMMERCE IN CHINA

China is entering the 'trillion' era of livestream commerce. Taobao Live alone reached over 400 billion RMB in GMV in 2020. Beyond scale, livestreaming in China is becoming increasingly diversified. Real estate, cars and rockets are items added into the ever-growing list of items sold through live commerce. We have seen top celebrities, brand presidents and even virtual characters become live anchors. And interactive 5G, 3D, AR and VR technologies are also increasingly used in live rooms for more immersive experiences.

While consumer preferences across entertainment and products may differ in the West, livestream commerce is already spreading there and being tested by the likes of Walmart, TikTok and Amazon – so, get exploring, and check out China's success stories on how to entertain and sell at the same time.



**JAMES BAY**  
MANAGING PARTNER, COMMERCE,  
WUNDERMAN THOMPSON CHINA

## CHAPTER 2: LEADING SOCIAL CHANNELS FOR COMMERCE

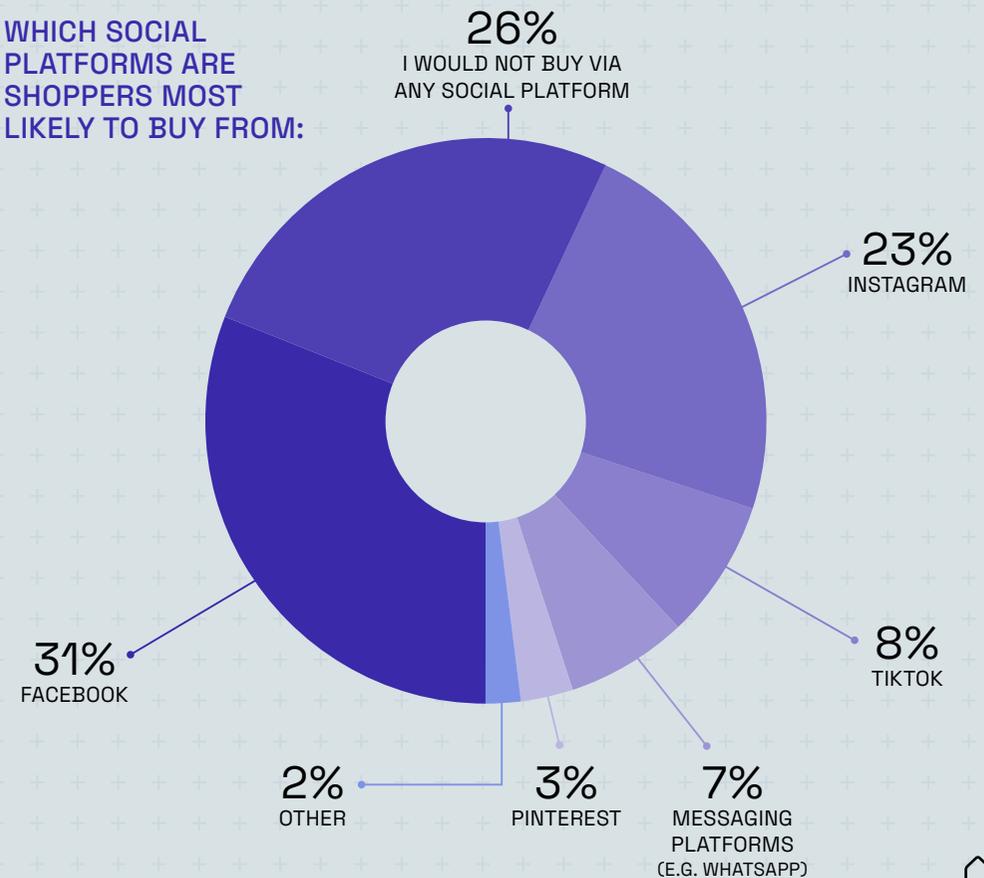
Having established that a majority of consumers are very much onboard with social commerce, the next key question for brands and retailers is – which platforms should we build our social strategy around?

We asked two questions to gauge consumer sentiment on this. Firstly, which social media platform digital shoppers were most likely to buy from, and secondly, which channel they thought was the best for social commerce. Both produced very similar answers, even down to the regional and age differences businesses need to take account of for targeting the right platform for their markets.

In both cases, Facebook was the clear winner. Overall, 31% of people said Facebook was the social media platform they were most likely to buy from, and 32% rated it the best for social commerce.

Facebook's popularity peaks with the 35 to 44-year-old age group, 41% of whom said they were most likely to buy from it. There is an argument that Facebook was very much a phenomenon for the Millennial and slightly older Gen X generations, and that, as they get older, it will eventually be overtaken by what are today seen as more youth-friendly alternatives.

### WHICH SOCIAL PLATFORMS ARE SHOPPERS MOST LIKELY TO BUY FROM:



To a certain extent, our data supports this. For the 16 to 24-year-olds we spoke to, Facebook ranks only second as the channel they rate best for social commerce and that they are most likely to buy from. Top of the pile for this generation is Instagram, which 39% say they prefer to buy from, and 42% rate as the best social commerce channel.

Of course, Instagram and Facebook are part of the same company. Together, a massive 54% of all consumers we spoke to worldwide said they were most likely to buy through one of the two if they did use social commerce. Globally, that puts the pair in a hugely dominant position which no other platform comes close to touching as yet. There is therefore a good argument that any social strategy should start with Instagram for the youngsters, and Facebook for slightly older shoppers.

Regional differences shouldn't be overlooked, however. Facebook is especially popular in Mexico, where 67% of people say it is their preference for buying through social, and Thailand (61%). By contrast, in Brazil, Colombia, Indonesia, India and Spain, Instagram is more popular for making purchases than Facebook.

Facebook and Instagram also offer different kinds of shopping experiences. Facebook operates two main commerce channels, a marketplace which is open to private and business sellers, and the Facebook Shop option which lets you create a digital shopfront within the platform. Instagram Shopping, meanwhile, is a set of tools that allow you to create 'shoppable' posts and tags, which essentially means extending normal content with buying options.

And then there is TikTok. While other channels barely make a dent in Facebook and Instagram's dominance across most of the world, in China, TikTok is the hottest social commerce ticket in town. There, TikTok accounts for a massive 68% of social purchases, and 70% of consumers rate it as the best channel for social commerce.

**70% OF CHINESE SHOPPERS BELIEVE THAT TIKTOK IS THE BEST CHANNEL FOR SOCIAL COMMERCE**

A video-first platform, tailor-made for influencer channels and livestream commerce, TikTok is also a hot youth trend. 10% of under-35s worldwide said they were most likely to buy from TikTok, double the number of over-35s.

It is also a platform that has enjoyed phenomenal growth outside China during the course of the pandemic. In the US, its second-biggest market, the number of active monthly users more than doubled from October 2019 to reach 100 million in August 2020. It is also believed to now total 100 million active users across Europe.

With growth that rapid in major Western markets, and having weathered the threat of a ban by the Trump administration, it will be interesting to see whether TikTok can mount a challenge to Facebook and Instagram on social commerce over the coming years.

## EXPERT OPINION: WHO WILL WIN THE RACE TO BECOME THE NUMBER ONE SOCIAL COMMERCE CHANNEL?

Social media platforms have performed a key role throughout the pandemic, with shoppers spending more time on social media channels. This is unlikely to dwindle, and, undoubtedly, social channels will become even stronger when it comes to commerce, not just for inspiration and search, but for transaction too.

Facebook and Instagram have long been the front runners, experimenting with shoppable features for a few years, and with IG checkout rolled out in the US, it shouldn't be long before this is introduced worldwide so everyone can have a slice of the action. However, with the emergent and more interactive channels such as TikTok coming to the fore and quickly gaining traction, especially in the APAC markets, it is difficult to assess whether the first mover advantage and penetration of both Facebook and Instagram will be enough to keep them out in front as the leading social commerce channels. My advice? Watch this space – but make sure you're not simply a passive bystander.



**CHLOE COX**  
SOCIAL STRATEGY AND INSIGHTS CONSULTANT,  
WUNDERMAN THOMPSON



### CHAPTER 3: GROWING THE SOCIAL COMMERCE CHANNEL VIA “INFLUENCE” & “RECOMMEND”, TWO RISING TRENDS IN SOCIAL

In this year’s survey, 57% of consumers told us they actively recommend products to their friends through tagging, direct messaging etc. – a defining aspect of the ‘social’ element of commerce, and a big increase on the 42% who said they did this in 2020.

Again, we see the same age and regional variations. Younger shoppers (65% of under-45s) are much more actively engaged in making and seeking purchase recommendations through social media, with 52% of over-55s saying this is not something they do at all.

This trend is hottest in India (79%), Thailand (77%), China (79%) and Brazil (76%). Again, European consumers are the least switched on, with 48% of shoppers in the Netherlands and 47% in Germany saying this is something they never do, as well as 55% in Japan.

Remembering back to “who” influences purchases, we see the role of social too.

When we asked who or what influences peoples’ purchasing decisions most, 21% of 16 to 24-year-olds worldwide said social media influencers and online bloggers, putting this second only to friends (25%) – who may well be influencing each other through social media anyway. The figure for 25 to 34-year-olds was only slightly less at 19%.

‘Influencers’ also ranked second on the list across the whole of Asia, with 19%, this time behind family members (24%). And in Brazil (26%) and India (23%), shoppers now rate social media influencers as holding the biggest sway over their purchasing decisions of all.

This is clear evidence of how social media is effectively re-shaping the digital shopping journey, creating new routes of inspiration, search and influence on purchasing decisions that are having a huge impact on consumer behavior across large parts of the globe.

Even in Europe, one in five consumers (20%) admit they now use social media as a source of inspiration. Take Europe out of the equation, the number is closer to two in five (38%).

## SECTION 5: KEY CONSIDERATIONS & ACTIONS

### START PREPARING THE GROUNDWORK FOR SOCIAL COMMERCE.

- Don't keep it siloed - it needs to be part of a balanced channel strategy. Our consultancy team can help you.

### SPEAK TO OUR SOCIAL COMMERCE CONSULTANTS TO HELP GUIDE YOU THROUGH THIS JOURNEY.

- Focus on the customer experience, not just sales.
- Review your fulfilment strategy so you can give social shoppers the instant gratification they expect.
- Consider your tech stack. To succeed with social commerce, it should be agile.

### GET UP TO SPEED WITH LIVECOMMERCE.

- Our APAC social commerce experts can share their learnings and devise and manage your strategies.





# SECTION 6: DIFFERENCES ACROSS SECTORS

## WHEN YOU BUY THE FOLLOWING TYPES OF PRODUCTS ONLINE, WHERE ARE YOU MOST LIKELY TO ACTUALLY PURCHASE?

	HEALTH AND PHARMACEUTICAL	ENTERTAINMENT	TOYS	LUXURY	TECHNOLOGY	BEAUTY	PET CARE	HOME FURNISHINGS	GARDEN PRODUCTS	CLOTHING AND FASHION	MOTORS AND ACCESSORIES	GROCERY
AT THE WEBSITE OF THE BRAND I WANT	16%	14%	8%	22%	20%	17%	11%	15%	9%	23%	12%	13%
AMAZON	10%	28%	24%	13%	22%	15%	13%	14%	16%	13%	16%	9%
OTHER MARKETPLACES (E.G. EBAY)	14%	16%	23%	14%	18%	18%	16%	21%	17%	21%	17%	14%
RETAILER SITES (E.G. LARGE RETAILERS SUCH AS JOHN LEWIS)	19%	10%	10%	13%	16%	18%	10%	19%	11%	21%	7%	17%
SOCIAL MEDIA SITES (E.G. FACEBOOK)	4%	8%	5%	4%	4%	6%	5%	4%	5%	6%	4%	4%
MERCADO LIBRE	2%	6%	8%	3%	6%	4%	5%	5%	7%	3%	8%	1%
VIA AN AGGREGATOR / DELIVERY APP (E.G. UBER EATS)	5%	2%	2%	1%	1%	2%	3%	1%	2%	1%	2%	18%
SECOND-HAND SITES	1%	2%	2%	2%	1%	1%	1%	2%	2%	2%	2%	1%
OTHER	4%	3%	1%	2%	2%	3%	3%	2%	2%	2%	2%	3%
I NEVER BUY THIS PRODUCT ONLINE	23%	9%	12%	20%	8%	14%	22%	14%	22%	6%	22%	19%
STREAMING (E.G. VIA SPOTIFY, VIDEOLAND, NETFLIX)	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

## SECTION 6: KEY CONSIDERATIONS & ACTIONS

### CHOOSE YOUR CHANNELS AND PLATFORMS WISELY.

- Whilst marketplaces tend to dominate, that's not the case across all sectors.
- Speak to our consultancy team to advise on the right channels and platforms to support your sector goals.





# SECTION 7: ETHICS & SUSTAINABILITY

## SECTION 7: ETHICS & SUSTAINABILITY

There have been concerns that the COVID-19 pandemic would deal a major blow to the cause of 'ethical consumerism'.

There is no doubt that the collective power of the consumer wallet can and does force even the most steadfastly profit-oriented corporations to take heed of issues like the environment and social responsibility.

But when push comes to shove, when shops are closed en masse, when the only option for getting a certain product is to have it delivered to your door, even if that does mean more traffic on the road – do people really still make purchasing decisions based on the provenance of the goods or the ethical track record of who they buy from?

The evidence from our survey suggests yes, they do. Fears that the pandemic would lead to consumers swapping their principles for pragmatism appear to be unfounded. Nearly three-quarters (71%) of people we spoke to said they wished brands and retailers would offer better environmental practices such as less packaging, reduced carbon footprint and eco-delivery vehicles – exactly the same figure as last year.

Even more significantly, 67% said that they considered a company's ethics and morals when making purchasing decisions, with 60% claiming they actively choose companies that are more environmentally responsible – both noticeable increases from 2020 (55% and 46% respectively).

**67% SAID THAT  
THEY CONSIDERED A  
COMPANY'S ETHICS  
AND MORALS WHEN  
MAKING PURCHASING  
DECISIONS**

The figures suggest that attitudes towards ethics and sustainability among consumers are fairly consistent across the world.

We can certainly see a strong Asian trend towards ethical consumerism in our figures. In Thailand, for example, 84% of consumers say they actively make buying decisions based on environmental factors and 87% cite ethics and morals as important to them. In China, the figures are 81% and 85% respectively, and in India, 80% and 82%.

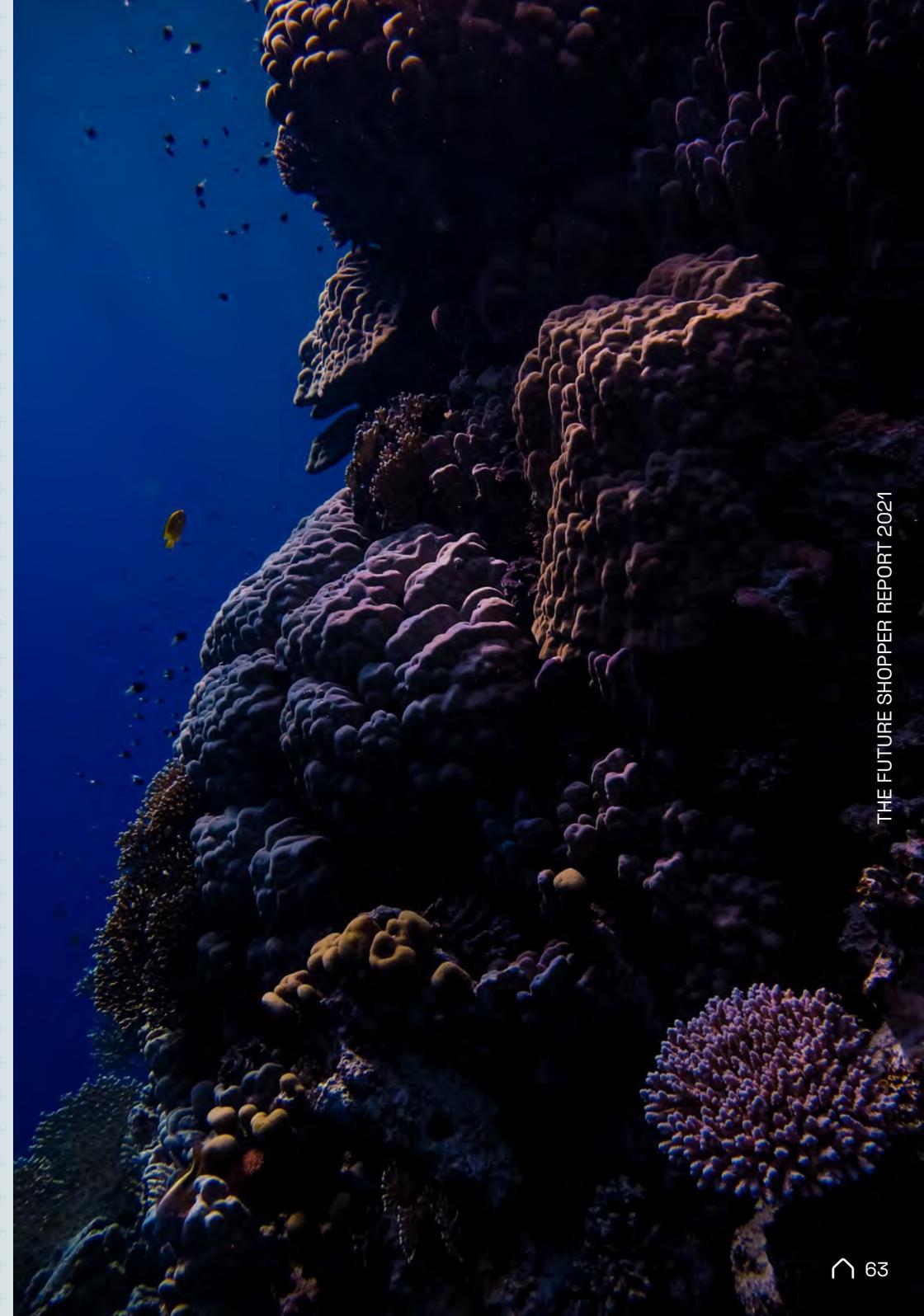




IMAGE COURTESY OF SELF FRIDGES

A brand's ethical and environmental credentials is also something that influences younger shoppers considerably more than older generations. Close to three-quarters (70%) of under-45s we spoke to overall said a company's ethics and morals play an active role in their purchasing decisions, dropping sharply to 58% of over-45s.

## 70% OF UNDER-45S WE SPOKE TO SAID A COMPANY'S ETHICS AND MORALS PLAY AN ACTIVE ROLE IN THEIR PURCHASING DECISIONS

Similarly, 63% of under-45s say they actively choose companies that are environmentally responsible, falling to 50% of over-45s.

From an environmental perspective, deliveries are arguably the area of digital commerce that have the biggest impact. As suggested above, the more order deliveries are made, the more vehicles are on the roads making more journeys.

With its "Amazon Day" delivery service, Amazon is seeking to play its part and offering a more eco-friendly option to its next day delivery Prime service, by allowing customers to select a single day for receiving all their ordered items. (Among the countries we surveyed, 34% of our UK audience have already used Amazon Day, with Japan at 30%, and the US double that at 60%).

We might expect this to be an area where eco-conscious consumers were most keen to apply pressure on brands, then. But actually, our survey findings are a little more ambiguous. On the one hand, 73% of shoppers told us that the country a product is being delivered from is an important purchasing consideration. However, this could be influenced by concerns about lengthy waiting times from distant countries as much as by wanting to choose a more sustainable option.

On the other hand, 22% said that, if given the chance to change one thing about online orders, they would focus on the environment. This puts it sixth on the list of priorities, well behind things like faster or cheaper delivery.

There are some notable regional variations – in Colombia and Germany, for example, 32% and 31% respectively said they would like to see more sustainable delivery options, raising it up to the fourth most cited change in both countries. But interestingly, despite the overwhelming majority of shoppers who said ethical and environmental considerations influence their purchasing decisions, just 14% of Thai consumers said they would make deliveries more environmentally friendly.

Are these chinks where we can see practical considerations still swaying consumer behavior over and above ethical concerns? We noted something similar in the fact that just 14% of people said they'd be convinced to shop somewhere other than their preferred marketplace by better environmental practices, and 13% by better brand ethics – both a long way behind cheaper prices (46%) and more convenient delivery options (20%).

## SECTION 7: KEY CONSIDERATIONS & ACTIONS

**ENSURE THAT YOUR SUSTAINABILITY CREDENTIALS ARE ROBUST AND AUTHENTIC, AND COMMUNICATED EFFECTIVELY.**

- Our strategic business consultants can help to devise and deliver your sustainability and eCommerce strategy.
- Connect with our communications experts to help build your sustainability credentials into your communications.



# SECTION 8: THE FUTURE OF COMMERCE

## SECTION 8: THE FUTURE OF COMMERCE

As the world begins to look beyond the COVID-19 pandemic, a key question that everyone in business has to grapple with is what success will look like in the altered world we emerge into, and what the ingredients for that success will be.

For much of the pandemic, the thoughts of commercial operators have been on short-term survival and meeting the immediate needs of their customers. Now, in this final section of our report, we will look further ahead and ask what innovations and emerging trends are likely to shape commerce in a post-COVID-19 world, based as always on the opinions of consumers.

### CHAPTER 1: CONSUMERS WANT DIGITAL INNOVATION

If there was any doubt about consumer desire to see their shopping experiences digitally transformed prior to the pandemic, those have well and truly been washed away in the wake of COVID-19.

We have already seen how a clear majority of shoppers feel more comfortable using digital technology in the wake of the pandemic (60%), and plan to use digital shopping channels more in the future (62%).

Our survey results provide a similarly clear message about consumer hunger for digital innovation. Two-thirds (66%) told us they wish brands would be more digitally innovative – a notable increase on the 52% who said the same in 2020.

**66% OF GLOBAL SHOPPERS WISH BRANDS AND RETAILERS WOULD BE MORE DIGITALLY INNOVATIVE**

Consumers in Asia (87% in China, Thailand and Indonesia) and also Latin America (86% across Brazil, Mexico and Colombia) are particularly keen to see more innovation from the brands and retailers they shop with.

A slightly smaller number (60%) said they are more likely to buy from a digitally innovative brand. Again, upwards of four in five shoppers in China, Thailand, India and Colombia said how innovative a brand is has a direct impact on their purchasing decisions. That's as clear a signal as brands and retailers can get to embrace digital innovation and run with it!

### DID YOU KNOW:

Shoppers in Asia and Latin America are particularly keen on the brands and retailers they shop with being innovative and there appears to be a **direct correlation between how innovative a brand or a retailer is, and how much consumers are happy to spend.**

## EXPERT OPINION: WHY WE'RE HEADING TOWARDS A CASHLESS SOCIETY AND WHAT IT MEANS

With much of the world starting to open up, things are slowly getting back to some kind of normal. However, this time around people have picked up a few new habits. One of those habits is a much more acute sense of hygiene. A cashless / contactless experience will have two effects; it will be both comforting and far more efficient. In the end, physical retail will be split into two camps – the experiential and the mundane. For the experiential, it will be providing customers a service that they could not get online or would have trouble having online. For the mundane, the key will be fast, efficient, and repeatable. No one wants to queue up to buy an onion, and it's another reason why biometrics like Alibaba's Smile to pay and Amazon's One will start to become more widespread.



**NAJI-EL ARIFI**  
HEAD OF INNOVATION

## CHAPTER 2: EXTENDING THE DIGITAL REACH

In terms of some of the innovations consumers are looking for, 60% said they were excited about a future with cashless payments – another big increase on 2020 (when the figure was 44%) and another big trend in Asia, where the figure in China, Thailand, India and Indonesia was over 80%.

Similarly, 62% said they were excited about no-checkout, no queue stores. The suggestion hidden in both of these figures, of course, is that consumers are no longer seeing digital shopping technology as something confined to traditionally 'digital', or online, channels. Consumers want to see digital tech taking over in stores, too.

This further extends into nearly half of consumers (48%) welcoming the idea of biometric payments, or using parts of their body like fingerprint, palm or retina scans to authorize cashless payments. Not only would this end the need to carry around a contactless card, it would also double up as a means of authenticating mobile payments through a smartphone, again without the need for passwords etc.

There is a very sharp age divide here. More than half of under-45s like the concept of biometric payments (54%), dropping to 41% of 45 to 54-year-olds, and under a quarter (24%) of over-55s.

Looking at other digital innovations popular with consumers, on the topic of personalization, three-quarters of people we spoke to (76%) said they would be happy for retailers and brands to use their purchase history and preference data to send them free samples of products. This figure rises to 91% in Brazil, with Thailand (89%) and Colombia (87%) not far behind.

Pushing the boundaries of how far the trail of data you leave behind online can be used to predict your buying preferences further still, 44% of consumers said they would even be interested in 'spending from the grave'.

The concept is this – using all the data available from years of buying online, it would, in theory at least, be relatively simple to create an AI-powered avatar that could be linked to a bank account and continue making purchases even after you had passed away.

**62%** OF GLOBAL SHOPPERS ARE EXCITED ABOUT STORES WITH NO CHECKOUTS LIKE AMAZON GO

The main appeal of this is for people concerned, for example, about leaving a family behind and wanting to continue to provide for them, as an alternative to standard inheritance – a kind of futuristic digital trust fund, if you like. There would, of course, have to be appropriate filters applied to make sure purchases were appropriate for the purpose, and there are lots of ethical and moral questions to answer before it becomes a reality.

It is interesting how much more open to this idea consumers in some regions are compared to others. In Thailand, for example, 79% said they would be interested, 74% in India and 63% in China. This contrasts to places like Germany, where 58% said they actively disliked the idea, as did 39% in the Netherlands, 36% in Australia, and 38% in the UK. We might speculate about the cultural, economic and life expectancy factors behind these differences.

### CHAPTER 3: GAMING COMMERCE

Speaking of avatars, the more time we spend online, the more we are living our lives through our ‘digital selves’ as well as our physical selves. This does not just mean the way we connect with friends and family through social media and video calls, as so many of us have become familiar with, through the COVID-19 pandemic. It also refers to the practice of creating distinct digital identities, which we use as an extension of ourselves to navigate through and interact with other people in cyberspace.

The modern phenomenon of online gaming has a strongly social element to it, with people from all over the world teaming up,

hanging out and making new friends online as they play. Some connect via video and voice, sure. But lots of gamers have avatars which become their ‘public face’ in the digital gaming world.

We know lots of people have had more time on their hands to play video games through the pandemic. According to our survey, 68% of consumers play games on mobile, 47% on a computer and 33% on consoles. From a commerce perspective, the more interesting finding is that 59% of people who play games also spend money through the games platforms they use.

**59% OF GAMERS SPEND MONEY ON GAMING THROUGH THE PLATFORMS THEY USE**

Given that only 16% of people we surveyed across all regions and all age groups say they don’t play video games at all, that means that half (50%) of all online consumers we spoke to spend money through video game platforms. That makes gaming a very significant and interesting commerce channel in its own right.

There are some important demographic differences to note in terms of who spends money through computer game platforms and where. Men (67%) are more likely to spend through gaming than women (52%), although the figure for women remains high.

### DID YOU KNOW:

The US, Asia and Latin America lead the way with gaming commerce, which, unsurprisingly, is also a young person’s endeavor.



In terms of geographic splits, gaming commerce is a much bigger trend in APAC, where 62% of gamers spend money as they play, and Latin America (63%) than it is in Europe (45%), with notable highs in the giant markets of India (80%), China (77%) and the US (70%).

As you might expect, there is a very clear age split. Two-thirds of 16 to 44-year-olds (66%) spend via gaming platforms, falling to just 25% of over-55s (46% of this age group don't play games at all, so the numbers actually spending through gaming are very low indeed).

Bringing it back to avatars – one idea that has emerged in recent times is that, if people are spending time interacting through their avatar, would they be willing to spend money on their 'digital selves'? For example, would consumers be prepared to spend money on digitized outfits, hair and beauty accessories and so on, to give their avatar a 'look' authentic to their real selves (or to project whatever image they wanted to project)?

We put this to our consumers as part of this year's survey, and overall 56% said they would be interested in buying products for themselves and for their avatar. So, while the assumption might be that gamers spend their money on credits, in-app purchases and so on, a majority are open to the idea of buying other digitized products and services, too.

## 56% OF GLOBAL GAMERS SAID THAT THEY WOULD BE INTERESTED IN BUYING PRODUCTS FOR THEIR 'DIGITAL SELVES' / AVATARS

The same geographic and age splits we saw in who spends through their gaming platforms are clear here, too. 64% of consumers in Latin America and 60% in APAC like the idea, falling to just 35% in Europe. 64% 25 to 34-year-olds and 63% of 16 to 24-year-olds would consider buying products for their avatar, compared to just 22% of over-55s. And men are more onboard with the idea than women, with a 63% to 49% gender split.



IMAGE COURTESY OF AMAZON

## CHAPTER 4: SMART ASSISTANTS AND VOICE COMMERCE

Ownership of smart assistants like Amazon's Alexa and Google Home is on the rise, achieving double-digit growth in the US in 2020 and reaching more than a third of the population. The more people own and use smart assistants, logic suggests that 'voice commerce' – the ordering of products online through these devices using your voice only – should also be on the up.

The findings of our 2021 Future Shopper survey back this up. 38% of consumers told us that they currently use or have used smart assistants to make purchases online. That's a notable rise from 27% in 2020 although we previously covered fewer countries. Another 21% say they intend to use voice commerce in the future.

**38% OF GLOBAL SHOPPERS TOLD US THAT THEY CURRENTLY USE OR HAVE USED SMART ASSISTANTS TO MAKE PURCHASES ONLINE**

Similarly, the proportion who have never used voice commerce and say they don't intend to do so is shrinking, down at 25% from 32% last year.

Interestingly, a higher proportion of men (43%) use voice commerce than women (34%). Younger shoppers are also more active using smart assistants to buy – 46% of 16 to 24-year-olds say they currently use voice commerce or have in the past, and 47% of 25 to 34-year-olds.

In terms of adoption, the US leads with 59% of consumers claiming to use smart assistants to make purchases. Other markets where more than 1 in 2 shoppers also use smart assistants to shop included UAE (55%), China (53%) and Mexico (51%). However, in both Germany and the Netherlands we saw a high percentage of users seemingly disinterested in the technology, with 53% and 46% respectively saying that they have never used this ordering service and do not intend to do so in the future.

Another significant variable influencing use of voice commerce is Prime membership. This makes sense, given that Amazon's Alexa-powered range of smart speakers are category leaders, and are also tightly integrated into its commerce channels through Prime. 47% of Prime members say they do or have used a smart assistant to shop, versus 33% of non-members.

## CHAPTER 5: SUBSCRIPTIONS

In previous years, we have reported a steady increase in the number of consumers signing up for online product subscription services such as Graze, Birchbox and Harry's. This year, however, we've seen a sharp fall in the popularity of subscriptions.

In 2020, for example, 32% of respondents said they were signed up to no subscriptions. This rose considerably to 56% this year.

Similarly, last year, 58% of consumers reported being signed up to one to three subscription services. This fell to 38% in this year's survey.

India (68%), UAE (62%), Mexico (62%) and especially Colombia (83%) showed the highest rates of engagement with

subscriptions. Last year, we also reported a sharp increase in the number of US consumers signed up to one to three subscription services, up from 29% in 2019 to 53% in 2020. But this has slipped back to 43% this year.

**38% OF GLOBAL SHOPPERS ARE SIGNED UP TO ONE TO THREE SUBSCRIPTION SERVICES (DOWN FROM 56% LAST YEAR)**



IMAGE COURTESY OF BIRCHBOX



## CHAPTER 6: AUTOMATED PURCHASING

Finally, we have seen a notable uptick in the number of people using automatic reordering devices like HP Instant Ink, Brita water filters, Nespresso coffee machine capsules, and so on. We call this Programmatic Commerce™, and after a relatively slow uptake over a few years, it seems to be a trend that is really catching on.

Last year, just under a quarter (24%) of people we spoke to said they had used one of these services, rising up to close to a third (32%) this year. In addition, another 20% haven't used such technology yet but intend to do so in the future.

High popularity in APAC has no doubt boosted this year's figures. Across the continent, 38% of consumers say they have used Programmatic Commerce™, reaching a peak in India (60%), despite 56% of

consumers in Japan saying they have never used such services and have no intention of doing so.

The figures also indicate considerable growth in the US, with current or previous use topping 56% – well above last year's highest figure, 38% in Spain, and a big jump up from 22% in the US in 2020.

The increase in adoption is clearly being driven by younger consumers. 39% of 25 to 34-year-olds are using or have used this technology, with another 23% intending to do so in the future. By contrast, 60% over-55s have no intention of using it.

As with voice commerce, Germany appears slow to embrace the idea of automated ordering by devices, with 61% of online shoppers saying they have never used Programmatic Commerce™ and do not intend to in the future.

## SECTION 8: KEY CONSIDERATIONS & ACTIONS

**INVEST THE TIME TO GET FULLY UP TO SPEED  
WITH WHAT'S NEW IN COMMERCE AND WHAT  
TECHNOLOGIES ARE SHAPING ITS FUTURE.**

- Digital innovation influences purchase decisions  
– how does your business stack up?
- Speak to our Innovation team to get familiar with,  
to test, and to deploy, these leading, future-  
ready technologies.



# CONCLUSION

## CONCLUSION

So what have we learnt from our research?

The COVID-19 pandemic will be seen as a tipping point for online commerce around the world. Digital was what kept the wheels of commerce turning globally, providing a lifeline to businesses and stuck-at-home consumers alike.

Consumers are spending more online compared to before the pandemic, they are feeling more comfortable about using digital tech as they shop, they plan to increase their use of digital commerce going forward and their expectations about the experiences they get are higher than ever. But delve deeper into what we, as consumers, share in common, and we find there are both notable differences and more nuanced variances among markets – distinctions which any brand or retailer would be wise to appreciate and factor in.

Wherever you look geographically, our findings show that marketplaces are leading the way online, whether it be Amazon in the West, Tmall, Taobao and Lazada in APAC; and Mercado Libre in LATAM. They are getting the service right, and they are attracting and retaining consumers from inspiration, through search to purchase.

But that's not the whole story. As much as the idea of buying everything from one place appeals to many consumers, marketplaces aren't the sum of what digital shoppers want.

Two thirds still want the option of being able to buy from the same brand in a store as well as online. Led by grocery, buying in-store is still a more popular option than any single digital channel across five different retail categories.

Throw in the fact that brand-owned, direct-to-consumer channels appear to have enjoyed a surge in popularity over the course of the pandemic, and that the rise of aggregators and delivery apps offers a ready-made, last-mile fulfillment solution that could revolutionize retail in much the same way it has the restaurant sector, and it is clear that there are still opportunities for brands to thrive in a digital world, even as the giant marketplaces continue to grow.

To take advantage of the opportunities available, brands and retailers will need to focus on honing a balanced omni-channel strategy, one that treats all channels, online and offline, as complementary parts of larger whole rather than separate, siloed operations in their own right. It will take a willingness to embrace innovation and new technology at every stage of the customer journey, and the will to explore partnerships at the same time as driving your own offer.

Above all, it will take a deep understanding of your market, your customer base, your local and regional conditions, to give you insight into how best to respond to the challenges laid down in the post-COVID-19 commerce landscape, and to lay the foundations for success going forward.



# HOW WE CAN HELP

## ECOMMERCE STRATEGY

**As a growth partner, we help retailers and brands strategize for high-performance eCommerce through a suite of proven end-to-end services.**

We help enterprise-level organizations to transact more business online by designing and implementing high-performance, future-ready digital strategies. This starts with defining a balanced multichannel strategy, aligned to your vision, and the planning of high-performance eCommerce solutions to support your growth ambitions and customer journeys.

[READ MORE](#)



Connect with our Strategy Director in Europe, [Krantik Das](#) or our Chief Strategy Officer in North America, [Adam Brown](#).

## ECOMMERCE PLATFORM TECHNOLOGY

**Deploying and integrating best-in-class technology to support your eCommerce operations.**

Through the implementation of world-leading commerce platforms underpinned by future-ready technologies, we're able to support the most ambitious client strategies. We've been doing this for more than 30 years — with hundreds of successful eCommerce implementations to our name, including the world's largest fashion and B2B platforms and grocery replatform. [READ MORE](#)



Connect with our Global CTO, [Glen Burson](#).

## MARKETPLACE STRATEGY AND MANAGEMENT

**Supporting and advising brands on how to increase results globally, at scale, on Amazon, Tmall and other online marketplaces.**

Wunderman Thompson Commerce is the leading provider of global eCommerce marketplace services and the founding partner of the WPP ACE, a Center of Excellence for Amazon. We run the largest global consultancy helping brands succeed on Amazon, Tmall and other marketplaces. We have helped 550 brands excel on Amazon over the last decade and our 100+ experts across 25 nationalities are helping clients drive annual online revenue of more than \$2bn on Amazon's marketplace alone. We have the people, processes and tools to deliver industry leading performance for our clients. [READ MORE](#)



Connect with the Head of WPP's Center of Excellence for Amazon in Europe, [Helmut Rieder](#) or our President, Marketplace Services, [Frank Kochenash](#) in NA.

## SHOPPER MARKETING

**Creating seamless consumer experiences to drive commerce in physical or digital retail.**

We help organizations to create seamless consumer experiences that drive commerce opportunities at physical or digital retail environments through a variety of specialist services.

[READ MORE](#)



Connect with our Group Account Director, [Todd Hudgens](#).

## SOCIAL COMMERCE

**Introducing a new revenue stream by helping brands capture and sell to new audiences through social media.**

Social platforms have evolved, with businesses now using social media to capture shoppers and directly sell their goods. Consumers can now buy through the likes of Instagram and Facebook, and brands and retailers need to nail their social commerce journeys to win over their audience and deliver a truly balanced channel strategy. We are working with leading retailers and brands to optimize engagement, build their social strategy and trigger transactions on these social channels. [READ MORE](#)



Connect with our Social Strategy and Insights Consultant, [Chloe Cox](#).

## INNOVATION AND FUTURE-READY TECHNOLOGY

**Reviewing, testing, and deploying innovative technologies and solutions to keep businesses ahead and future-ready.**

We explore, recommend and implement workable innovation, testing ideas, methodologies and leading-edge technologies to help businesses shape their own future and stay ahead. After all, how can you navigate the future of eCommerce without an understanding of the tech and trends shaping it? [READ MORE](#)



Connect with our Head of Innovation, [Naji El-Arifi](#).

# HOW WE CAN HELP

## CUSTOMER EXPERIENCE

**Inspiring transactions across the journey.**

In putting the customer at the heart of every journey touchpoint, customer experience must not only work, but inspire both action and transaction. Our ability to create and support these customer journeys is born of science and commercially driven — we create optimized, multichannel customer journeys that drive engagement and transaction at every point. Key to this is our unique methodology known as “Commerce Experience Design” that exploits the synergies between Interface Design, User Experience Design and Service Design. [READ MORE](#)



Connect with our Customer Experience Director, [Rachel Smith](#).

## CREATIVE SERVICES INC. DESIGN & BUILD

**Inspiring powerful online CX and industry-leading websites.**

We see creative inspiration as the critical agent of change, actions and transactions across stunning customer journeys time and time again. And drawing on the arguably unparalleled creative heritage of our parent Wunderman Thompson, we’re uniquely able to do this, applying our multiple award-winning creative credentials to front-end build, including websites, mobile sites, app builds and more. [READ MORE](#)



Connect with our Head of UX & CX Consultancy, [Mike Rokes](#).

## MANAGED SERVICES: PEAK SELLING SUPPORT

**Protecting your most important business asset — your eCommerce website — so you can focus on what you’re best at.**

Our managed services and applications are tailored specifically to client requirements and budgets, so they can concentrate on their core business, assured of powerful eCommerce performance through the support of highly experienced teams, including commerce architects and software engineers. A key service is our peak operations support. As one of the leading authorities on peak selling, we support many of the biggest retailers through the Black Friday and holiday sales periods. [READ MORE](#)



Connect with our Head of Service Operations, [Mario D’Cruz](#).

## DIGITAL INTELLIGENCE

**Delivering insight-driven change to help your business excel in the age of the customer.**

Led by an expert team of implementation, data science and optimization analysts, we help multichannel organizations manage and interpret their data in order to support insight driven change. We also work with businesses to develop the tools and processes needed to become a data-led organization that gets results. [READ MORE](#)



Connect with our Business Services Director, [Andrew Waugh](#).

## COMMERCE DATA MANAGEMENT

**Helping consumers buy what they want, where they want it, wherever they are shopping.**

We make any channel transactional, and create data-driven solutions to assist consumers’ ability to purchase the products they love. Feed Management and Commerce Director connect consumers to retailers’ and brands’ products, on any channel, to maximize sales. Our technology enables performance monitoring, benchmarking globally to deliver insight. [READ MORE](#)



Connect with our Head of Commerce Data Management, [Dwayne Manzano](#).

## PRODUCT EXPERIENCE MANAGEMENT

**Offering the best quality product content, published on every digital shelf, where consumers are browsing for products is vital for success.**

We offer a full service to brands and retailers looking for best in class product content organization, including delivery of the best PXM solutions available. We partner with brands, retailers and distributors to help them improve their customer experience, product content processes and organizational needs to help them win on the digital shelf. [READ MORE](#)



Connect with our PIM Lead, [Dennis Peek](#).

## ABOUT WUNDERMAN THOMPSON COMMERCE

At Wunderman Thompson Commerce we inspire people to transact.

Part creative agency, part consultancy and part technology company, we are unique in our ability to connect world-class strategic thinking and creative insight with deep executional capability across technology and operations to deliver winning commerce solutions across all major digital routes to market worldwide: marketplaces, online retailers, D2C, B2B and social commerce.

We are a diverse team of 1700+ commerce experts across more than 20 offices worldwide, who believe that growth through commerce begins with connected customer experiences that amplify the brand and drive business outcomes. We excel at orchestrating commerce touchpoints through intelligent deployment and integration of world class technology from strategic partners like Adobe, SAP, Salesforce, HCL, Shopify, BigCommerce & commerce tools, as well as driving sales from marketplaces (Amazon, Tmall and beyond) and retailers.

Our clients include Bayer, Bosch, DFS, Johnson & Johnson, MAC, Nestlé, Sainsbury's, Selfridges, SharkNinja, Shell, Specialized, Tempur and Tiffany & Co.

Wunderman Thompson Commerce is a WPP agency, recognized as a Leader in The Forrester Wave™: Commerce Services, Q1 2021. More details on the achievement can be found [here](#).

For more information on Wunderman Thompson Commerce, please visit us at [www.wundermanthompson.com/service/commerce](http://www.wundermanthompson.com/service/commerce) and follow us on [Twitter](#), [Facebook](#), [LinkedIn](#), and [Instagram](#).

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