


E-COMMERCE ACCELERATION

KEYS – A WEBINAR SERIES BY IPSOS

25th February 2021



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ACCELERATION**

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GAME CHANGERS Ipsos

Watch the recording [here](#)

GAME CHANGERS



AGENDA

INTRODUCTION

Jennifer Hubber
Simon Atkinson

Head of Ipsos Global Client Organisation
Chief Knowledge Officer, Ipsos

TIME FOR ACCELERATION, TIME FOR UNDERSTANDING

Helene Lefebvre

Chief Client Officer, Ipsos Global Client Organisation

CHANGING CONSUMER CONTOURS

Chris Murphy

Global President, Market & Brand Strategy, Ipsos

DIGITAL LIFESTYLES – SPOTLIGHT ON SOUTH KOREA

Jaeyoung Oh

Group Leader, Market Strategy & Understanding, Ipsos in South Korea

DOES YOUR ONLINE EXPERIENCE DELIVER?

Yana Beranek

Senior Vice President, User Experience, Ipsos



Follow [this link](#) to access resources from the webinars in our KEYS series

WHAT'S NEW?

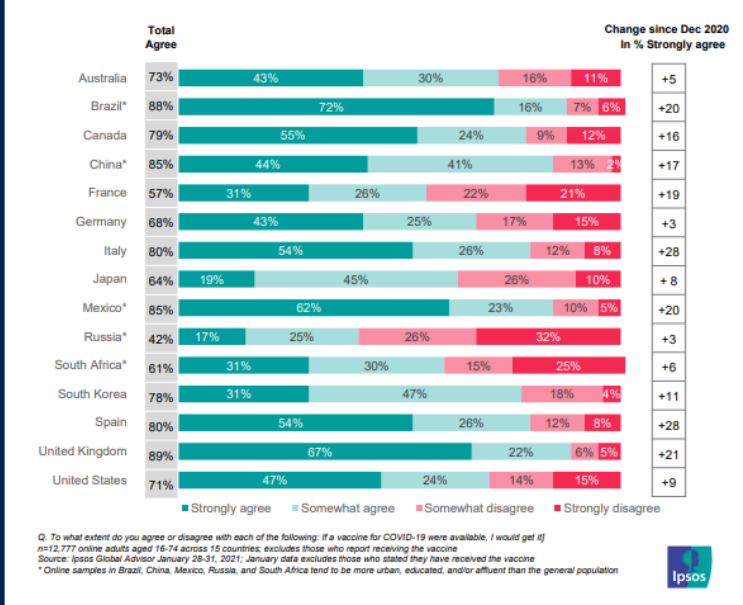


INTEREST IN GETTING VACCINE CLIMBS SIGNIFICANTLY IN MOST COUNTRIES

"If a vaccine for COVID-19 were available to me, I would get it"

(RESULTS ONLY AMONG THOSE REPORTING THEY HAVE NOT RECEIVED THE VACCINE)

© Ipsos | World Economic Forum 2021 | Vaccines

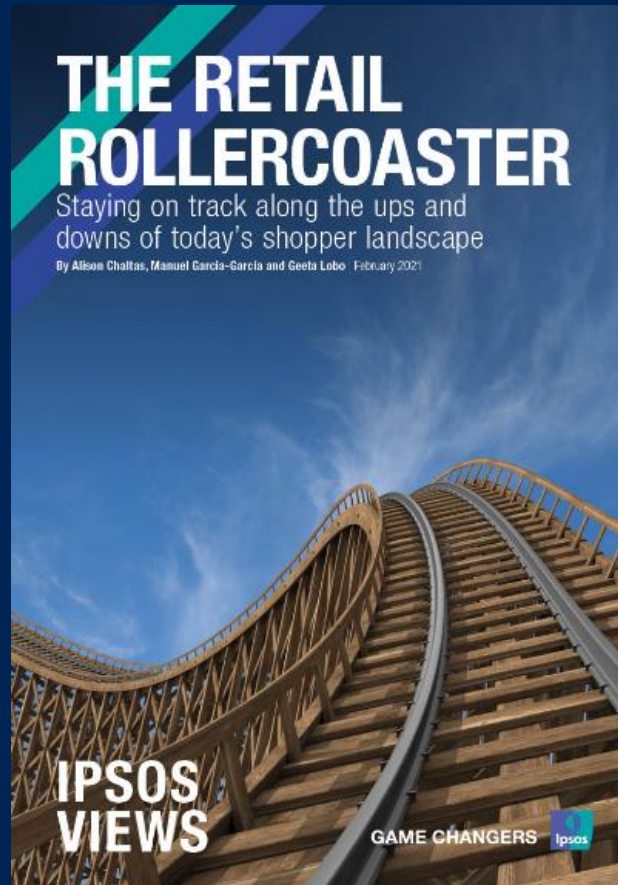


Download the [summary](#) or [full report](#)
[Watch](#) the presentation

Ipsos vaccines research home page [here](#)



WHAT'S NOW? E-COMMERCE ACCELERATION



Watch the **webinar recording** [here](#)
Coming soon: A new White Paper which will be available [here](#)



This new analysis is released on **1 March** and will be available [here](#)



The Ipsos Flair South Korea 2021 report **launches in March**.
Download the 2020 report [here](#)

TIME FOR ACCELERATION – TIME FOR UNDERSTANDING

Helene Lefebvre
Chief Client Officer

GAME CHANGERS



Covid-19 has opened the flood-gates to omnichannel living



Acceleration of digital transformation has



led to a huge expansion of multi-channel experience for consumers



...which in turn leads companies to revisit their overall strategy across multiple dimensions

Time for acceleration



It is time to think beyond a short-term band-aid for booming online demand and rethink the role of eCommerce as central to the overall customer journey... On eCommerce, you need to really think about it end-to-end: what does it mean for your portfolio, but also for your price, product, promotion, or place? For your content creation, media strategy, analytics and supply chain?

Conny Braams,
Chief Digital &
Marketing Officer
at **Unilever**



Our customers want one, seamless Walmart experience. Earning more of our customers' business in food and consumables is foundational to our strategy and, at the same time, we will expand our ability to serve them with general merchandise in stores and through our broad eCommerce assortment as we continue to invest and build our eCommerce business.

Doug McMillon,
Chief Executive Officer
at Walmart

Time for understanding



VS.



Businesses need to evolve their strategy fast ... across all dimensions

The goal is to activate the right content...to the right audience...with the right touch points...at the right moments

Need to think holistically and to identify the role that brands can play. Four main pillars

Diagnose 

Innovate 

Communicate 

Activate 



Human experience at the core

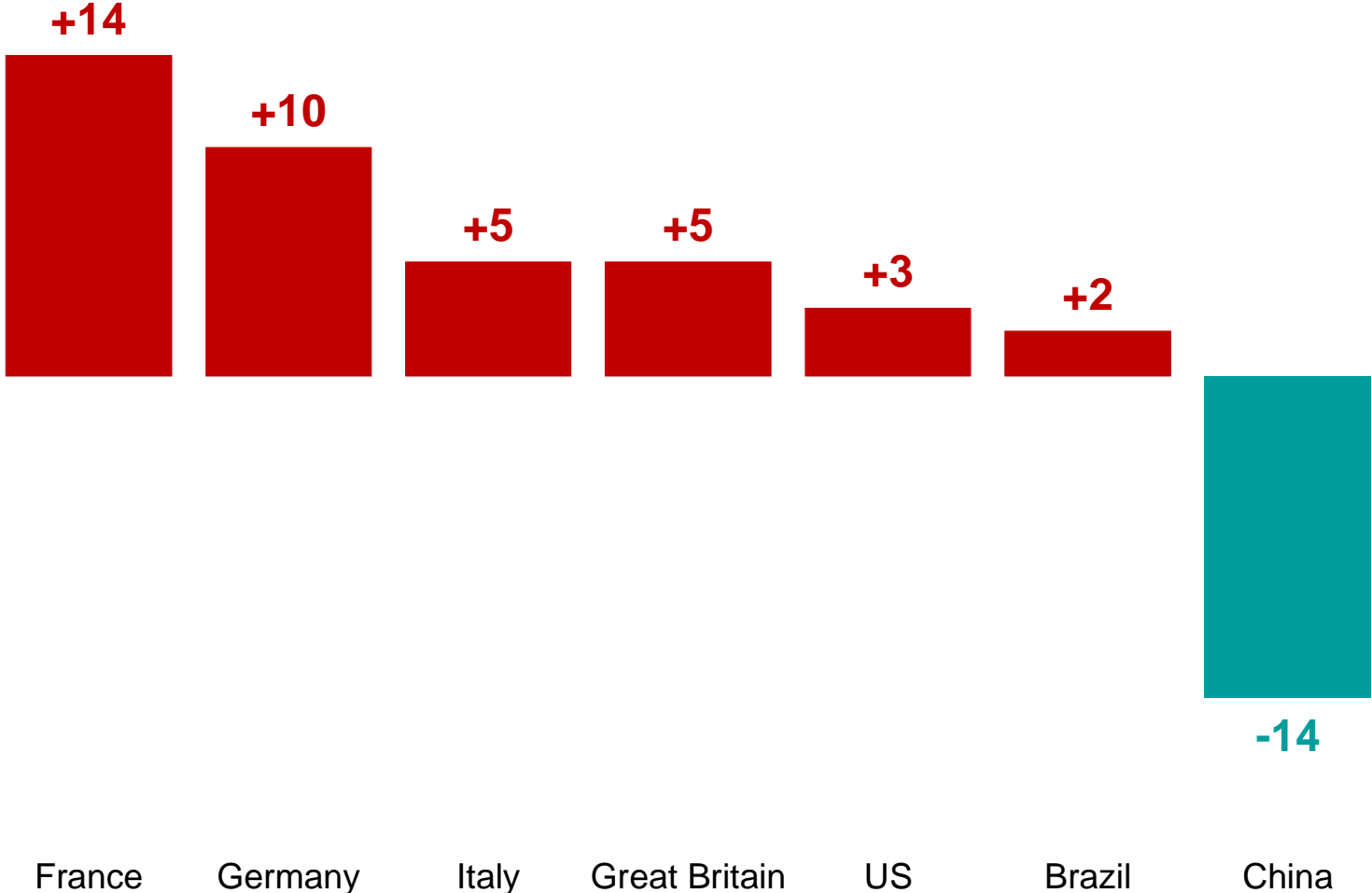
Critical to evolving channel strategy is an understanding of the human experience.

People don't always feel the human touch is present when operating in the digitized environment.

GROWING FRICTION WITH E-COMMERCE?

“I find shopping online more difficult than shopping in traditional stores”

Change in % agree
2019-2020



Ipsos Global Trends Series, 2020





**Keeping the human experience at the core
has the power to resolve potential
frictions and maximize the potential for
positive impact on brand equity and
overall performance**

CHANGING CONTOURS

Chris Murphy
Global President,
Brand & Market Strategy

GAME CHANGERS





ESSENTIALS: What is it?

- Syndicated tracking of consumer behavior, attitudes and sentiments – refreshed every two weeks
- Qualitative deep dives through longitudinal ethnography

Every other week, we connect with 1,000 consumers in: Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico*, Russia*, South Africa*, South Korea, Spain, United Kingdom, and the USA

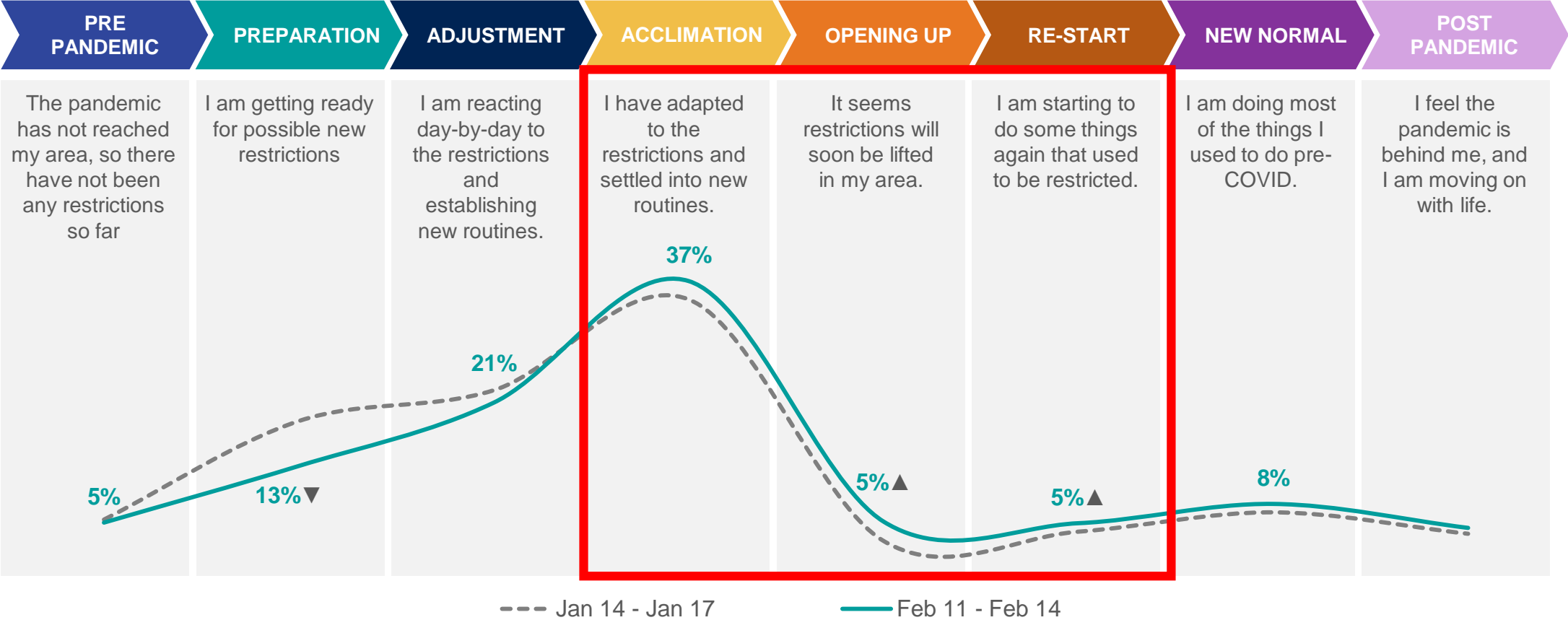
* n=500 in Mexico, Russia and South Africa

Changing Contours

Data from Feb 11-14

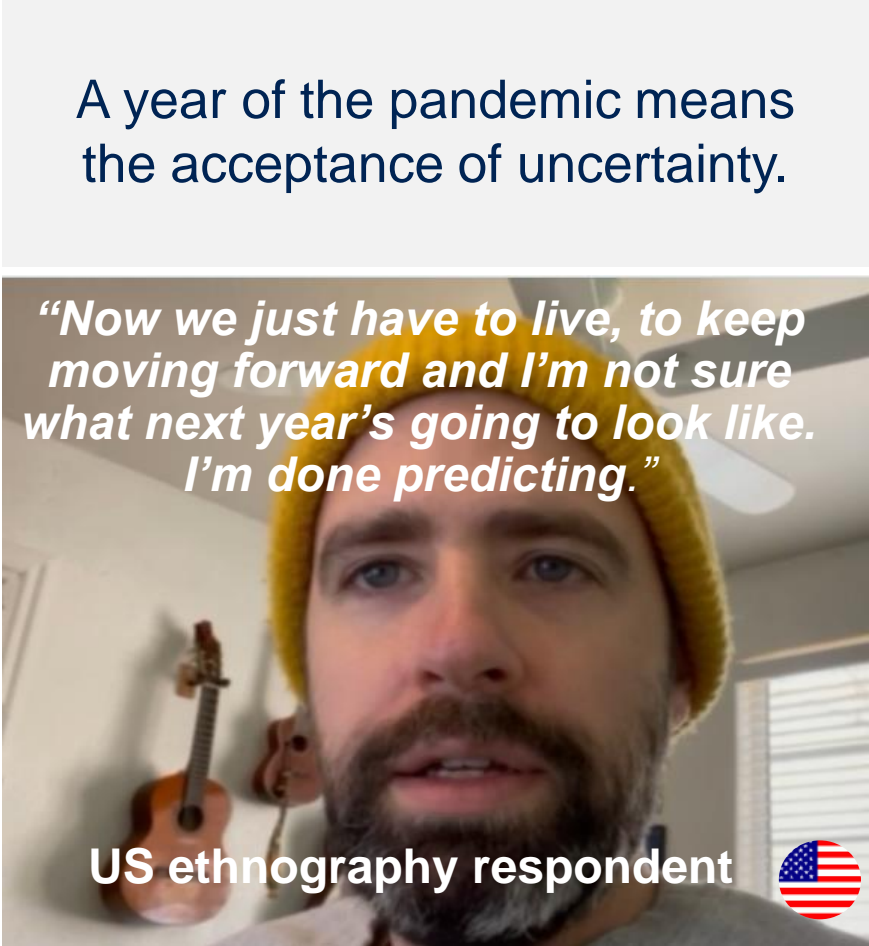
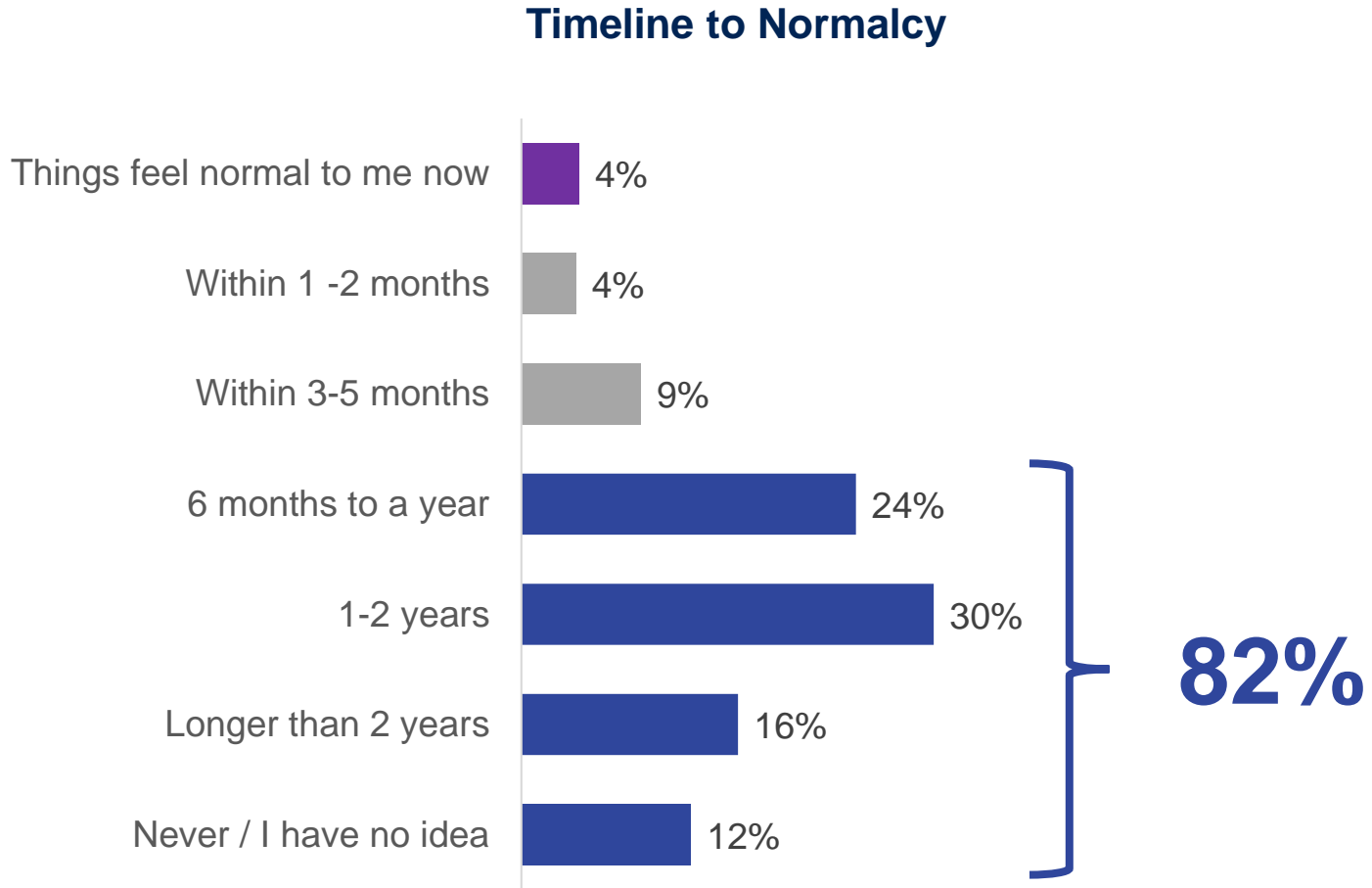
After months of retreat, we see acceleration along the recovery curve

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?
 Base: Jan 14 - Jan 17: 14523, Jan 28 - Jan 31: 14520, Feb 11 - Feb 14: 14528
 ▼ or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

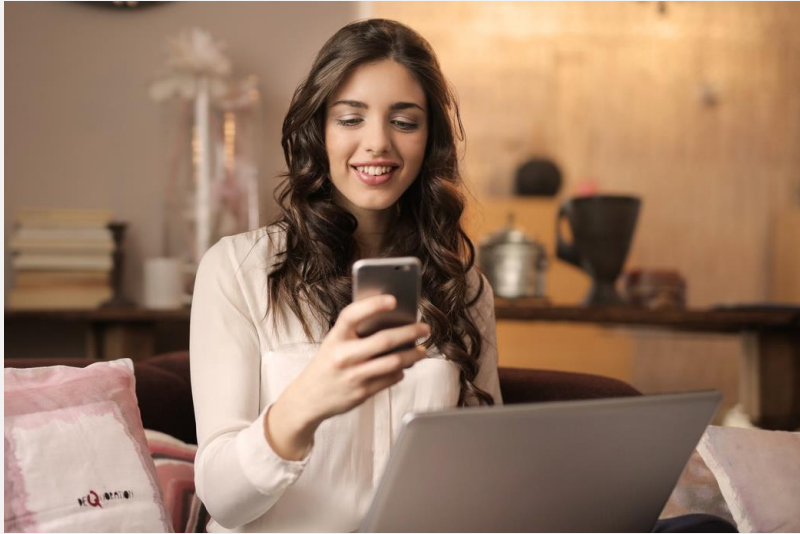
But “re-entry” and “normality” are not the same thing. The time horizon for a return to normal continues to extend amidst the threat of variants.



Q: How long do you think it will take before things feel like they are getting back to normal?
Base: 14528

CHANGING CONTOURS SHOPPING ADJUSTMENTS





31%

...report their **primary**
transaction channel is **online**



59%

...are taking measures to **limit**
time in-store

Q: (I take measures to try and limit the amount of time I spend shopping in-store) To what extent do you agree or disagree with the following statements related to shopping? Base: n=14528
Q: Where are you currently buying a majority of the items you need right now? Base: n=13526

Shopping at stand alone stores and malls has plateaued in 2021 after declining in the last few months of 2020

Shopping Behaviour Trended
(% Already doing this)



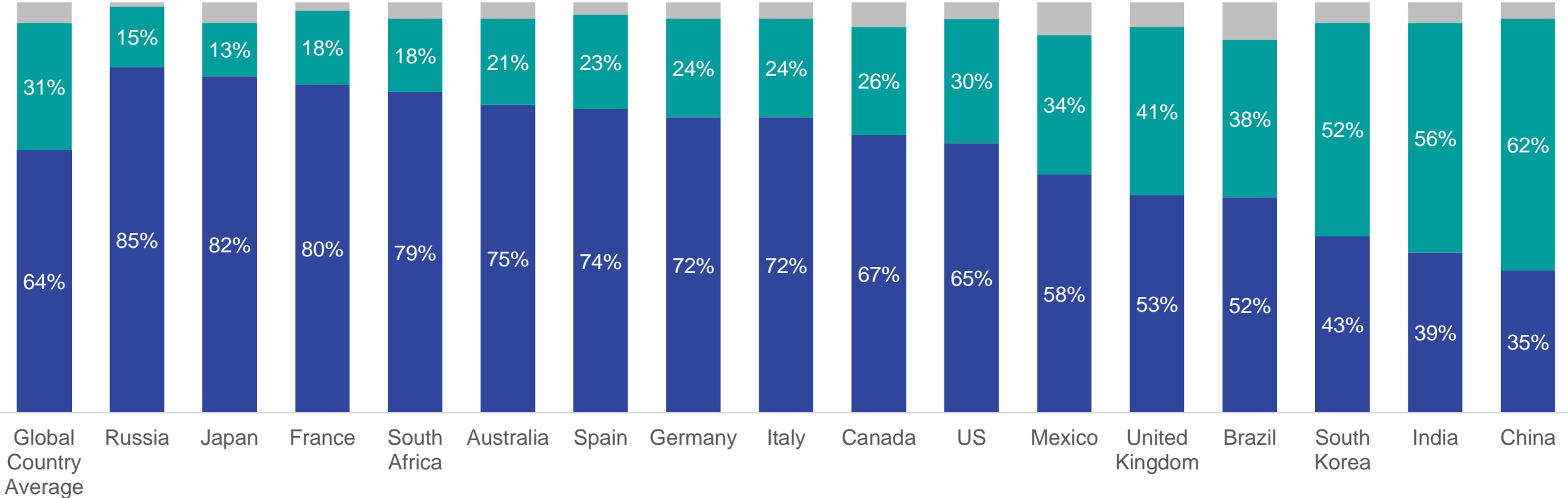
Q: For the following, when do you think you'll feel comfortable participating in each of these activities again? (I'm already doing this)
Base: Feb 11 - Feb 14:14528



The percentage of those who say online is their primary purchase channel varies considerably by country

Primary Purchasing Channel

■ In-store ■ Online (including BOPUS, curbside...) ■ Not shopping right now



“The Global Country Average” reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result

Q: Where are you currently buying a majority of the items you need right now?

Base: Global Country Average: 13526, AU:1000, BR:1001, CA:999, FR:1004, DE:1004, IN:1001, IT:1001, JP:1003, MX:503, RU:501, ZA:501, SK:1003, ES:1001, UK:1000, US:1004

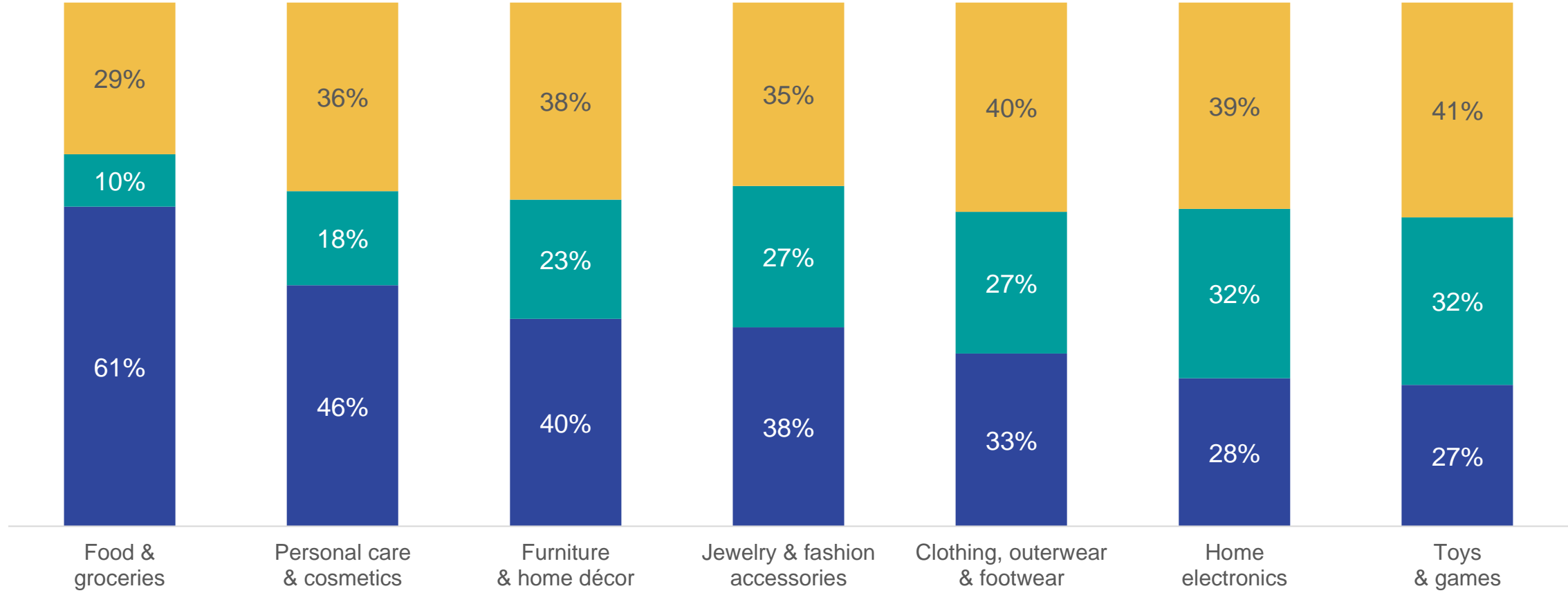


Online behavior varies by category

Purchase Channels

- Category Shoppers -

■ In-store only ■ Online only ■ Both in-store and online



Q: Where have you been purchasing the following categories?
 Base: Varies by category: 7766-14139



Love letters and hate mail



Dear Amazon,

*I have grown to love you over the year because **I can count on you. You have not always been perfect, but you have been honest and respectful, kind and solution-oriented...you have brought me into a whole new world of trust and belief that shopping online will work.***

U.S. Ipsos Community Member



OMG [Big Box Retailer],

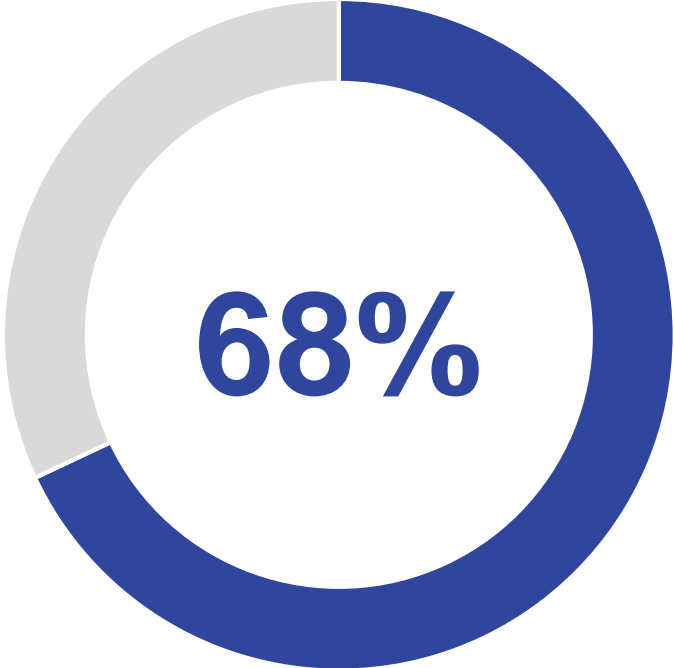
*I **hate your long lines...I hate your parking lot. I hate that you never have any type of selection, you never had it. I hate that you say you are into safety, yet no one wears masks** in your store, and you are ok with that.*

U.S. Ipsos Community Member

Source: Ipsos SMX Online Communities: February 12 – 18, 2021

Q: Write either a breakup letter or a love letter to a retailer of your choice. In your letter, specify which retailer you chose (i.e. “Dear Retailer,”), and then tell them why you are breaking up with them or why you love them so much. Base: 112

But there is room for improvement: significant growing pains as retailers struggle to meet demand



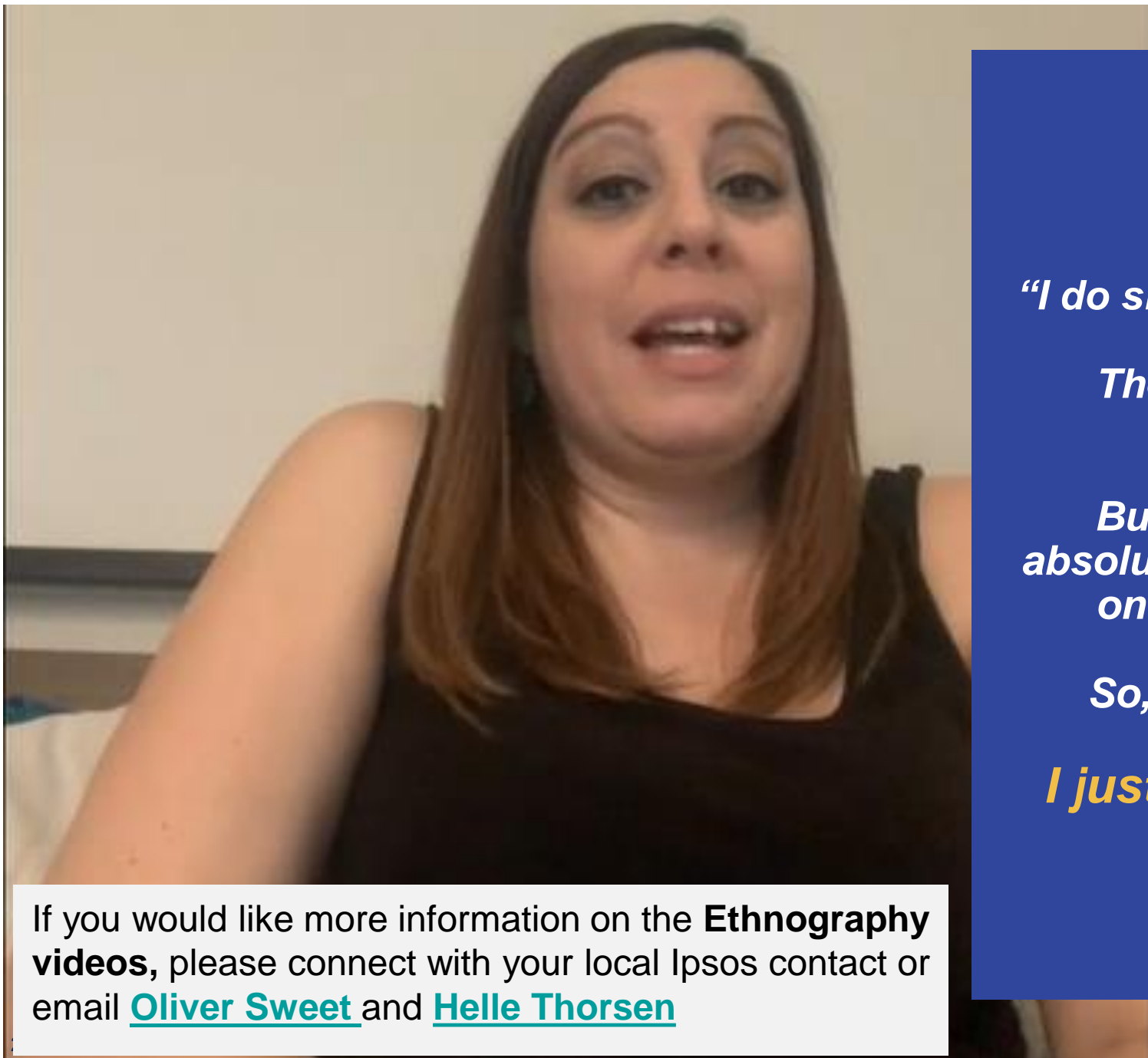
Recently faced issues when shopping online

Top Issues Encountered While Shopping Online

- Recent Online Shoppers -



Q: Which of the following issues have you encountered when shopping with a retailer online recently?
Base: Recent Online Shoppers (n=12623)



TO RECAP

“I do shop online a lot more than in-person.

The only in-person shopping I do is grocery shopping.

But I go to the store and buy when I absolutely have to, but I seriously feel like I only leave the house once a month.

So, everything else I just buy online.

I just sit in this bed, and TA-DA!!!”

US ethnography participant



If you would like more information on the **Ethnography videos**, please connect with your local Ipsos contact or email [Oliver Sweet](#) and [Helle Thorsen](#)

The contours of the crisis recovery are shifting

1

We are moving forward, but with an evolving set of expectations regarding the timing and nature of normality

2

Some of the adjustments we made this past year will stick – evidence suggests OL shopping habits will sustain

3

It's never been more important for brands to activate the right content...to the right audience...with the right touch points...at the right moments.

There are substantial challenges ahead as brands attempt to deliver against consumer expectations, and we must remember to keep the **human experience at the center of this activity.**



DIGITAL LIFESTYLES: SPOTLIGHT ON SOUTH KOREA

Jaeyoung Oh
Group Leader,
Market Strategy & Understanding

GAME CHANGERS



DIGITAL MEDIA as a partner for Daily Life



People started to watch concerts, performances and musicals via online



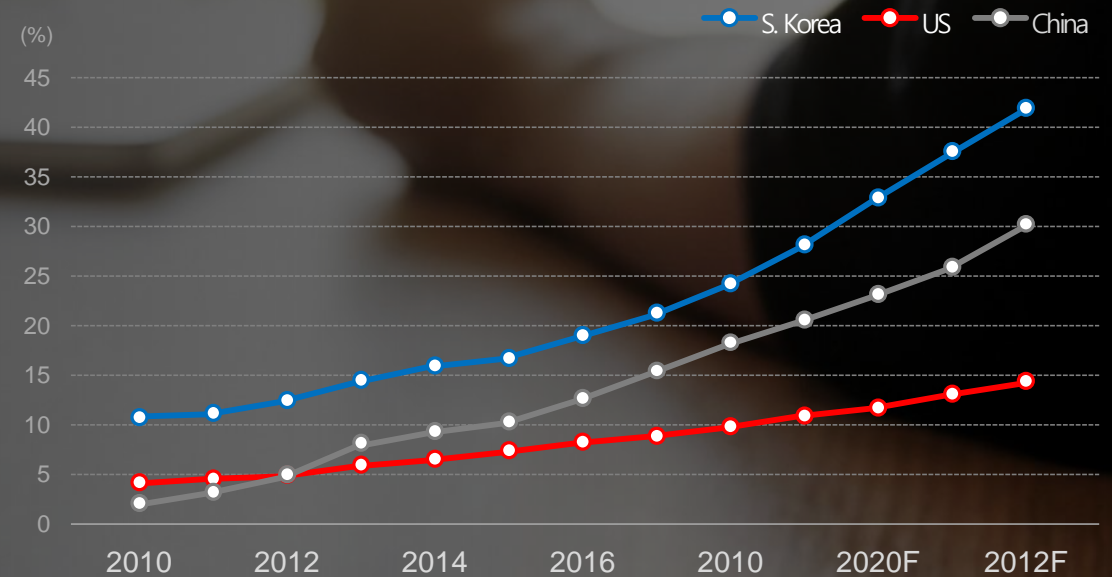
E-commerce market in South Korea

Korean favor 'Contactless' culture

5th

E commerce market size as of 2019

E-commerce Penetration Ratio



* Source : Statistics Korea

People started to buy their grocery food online

And it's more noticeable among older generations in their 40's ~ 50's



Grocery shopping supported by 'Early morning delivery'

Order before 11PM then delivered by 7AM next day

101% growth

Consumers' time spent on the Market Kurly platform from January to April of 2020 recorded 3.28 million hours, up 101% from the same period last year

Compete with delivery service brands

- Morning Star delivery
- Rocket Fresh
- Flash delivery

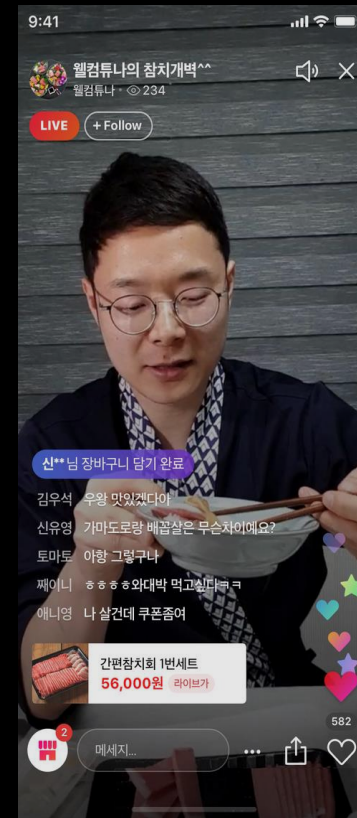
Live commerce for younger generation

Outdoor shopping with friends is being replaced by new shopping platform



Real Time Interactivity

Fun Experience of 'being there'



Wrap Up



Acceleration

More familiar with online environment



New experiences

Going to concerts on-line
Online shopping of grocery, clothes and accessories



New business

Live streaming, new delivery services

DOES YOUR ONLINE EXPERIENCE DELIVER?

Thank
you



with
love!

Yana Beranek
SVP, User Experience, Ipsos

GAME CHANGERS



DOES YOUR ONLINE EXPERIENCE DELIVER?

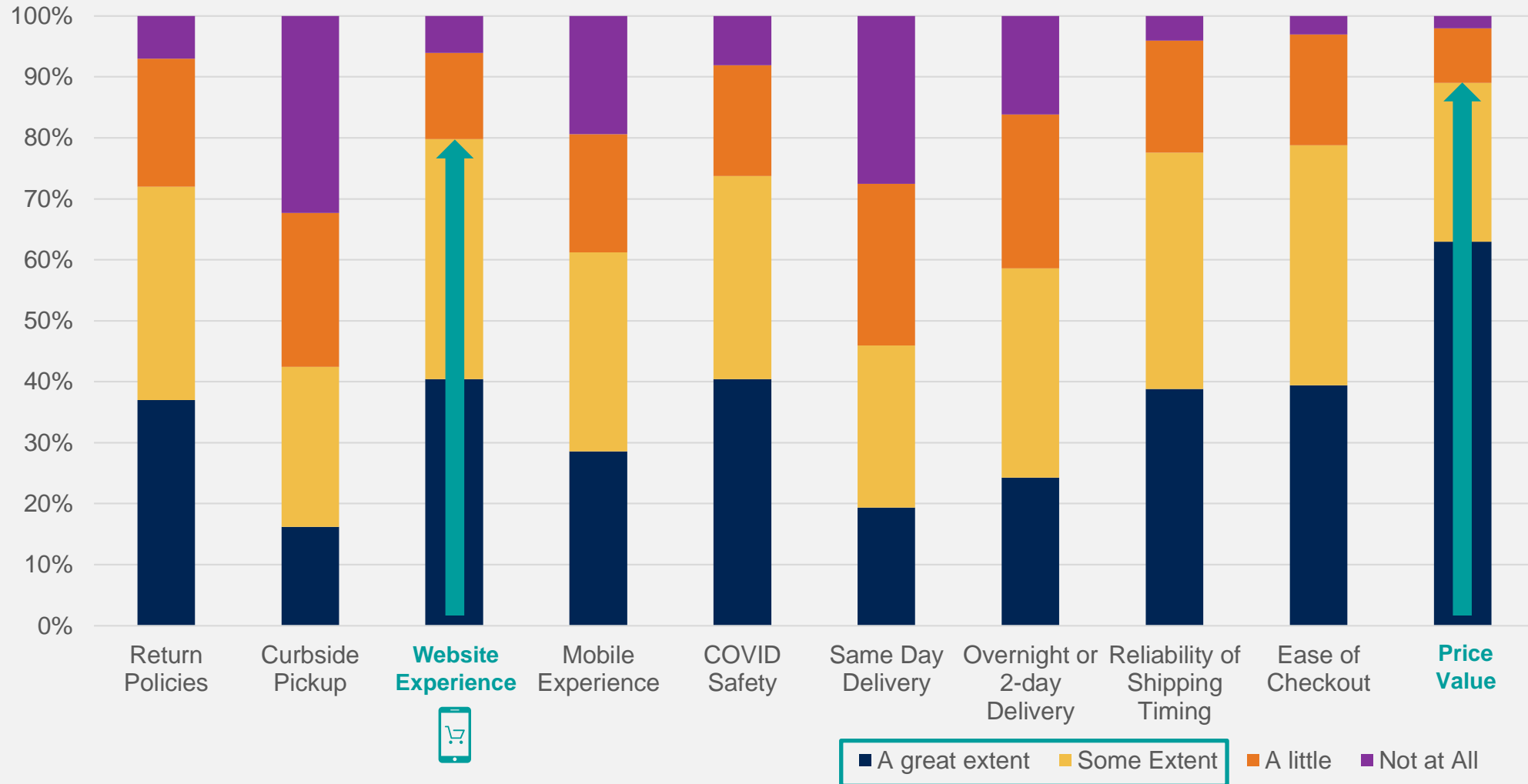
Topics for today

1. What Consumers Think
2. What Consumers Want
3. Top Tips & Questions to Consider

WHAT CONSUMERS THINK





1

The Website Experience Plays a Key Factor in Store Choice



Source: The Ipsos Coronavirus Consumer Tracker, fielded April 28, 2020 among 1,113 U.S. adults.)

But People Say Online Experiences Are Difficult to Use

ONLINE TOOL	 TRIED	CAN'T FIGURE IT OUT	NOT SATISFIED	COMPLETELY SATISFIED
 Groceries	43%	11%	50%	40%
 Restaurants	53%	7%	50%	43%
 Durable Goods	24%	13%	51%	35%

Source: The Ipsos Coronavirus Consumer Tracker, fielded Sept. 15 - 16, 2020 among 1,113 U.S. adults.

WHAT CONSUMERS WANT

2

**What makes
an online
experience
useful?**



Many of the same things that we expect in a retail experience





Well-organized to find what I want





WELL ORGANIZED

Online store
layouts are
often messy

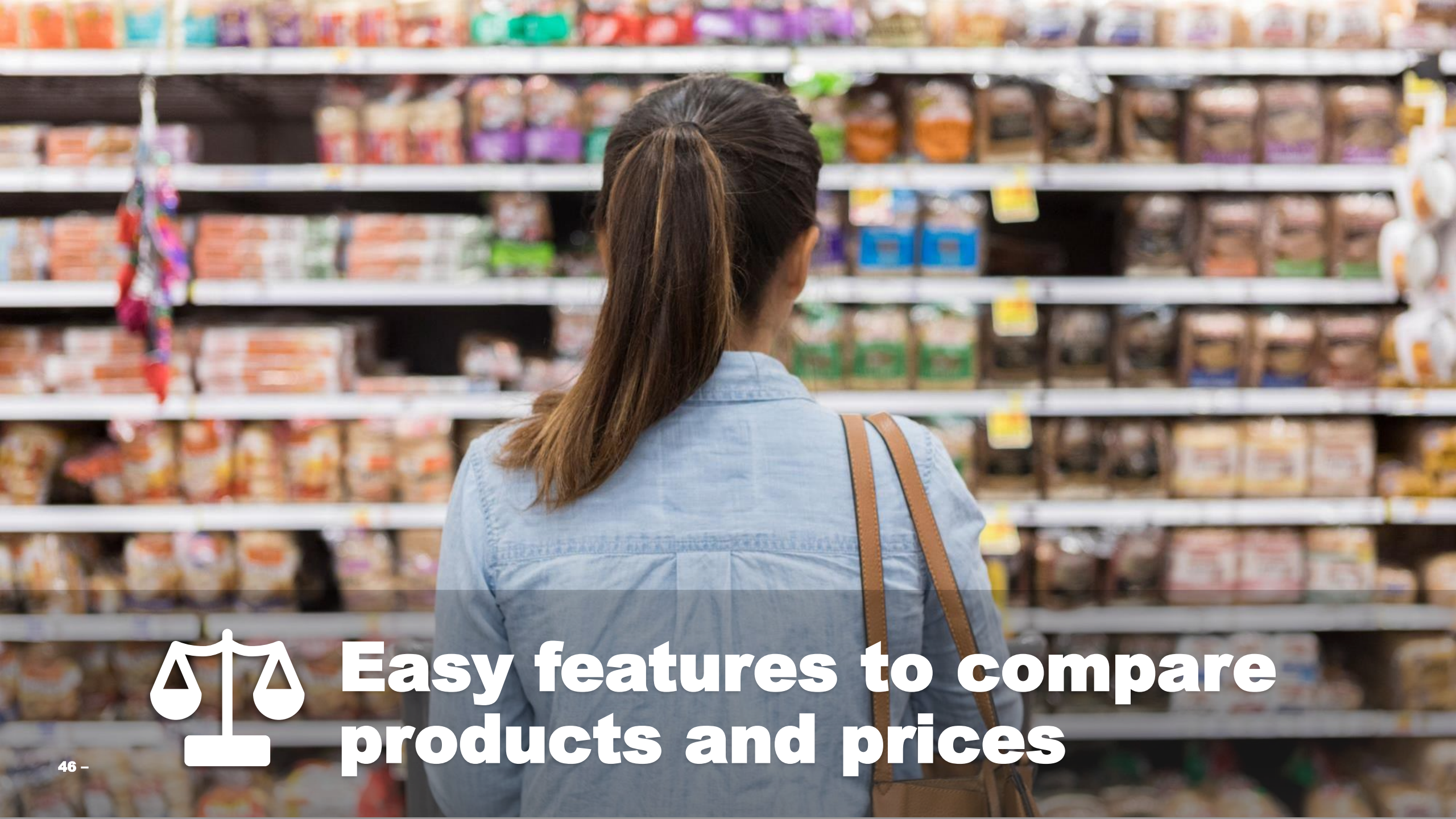


WELL ORGANIZED

Keyword search must work well

because site menus are so confusing





Easy features to compare products and prices



EASY TO COMPARE

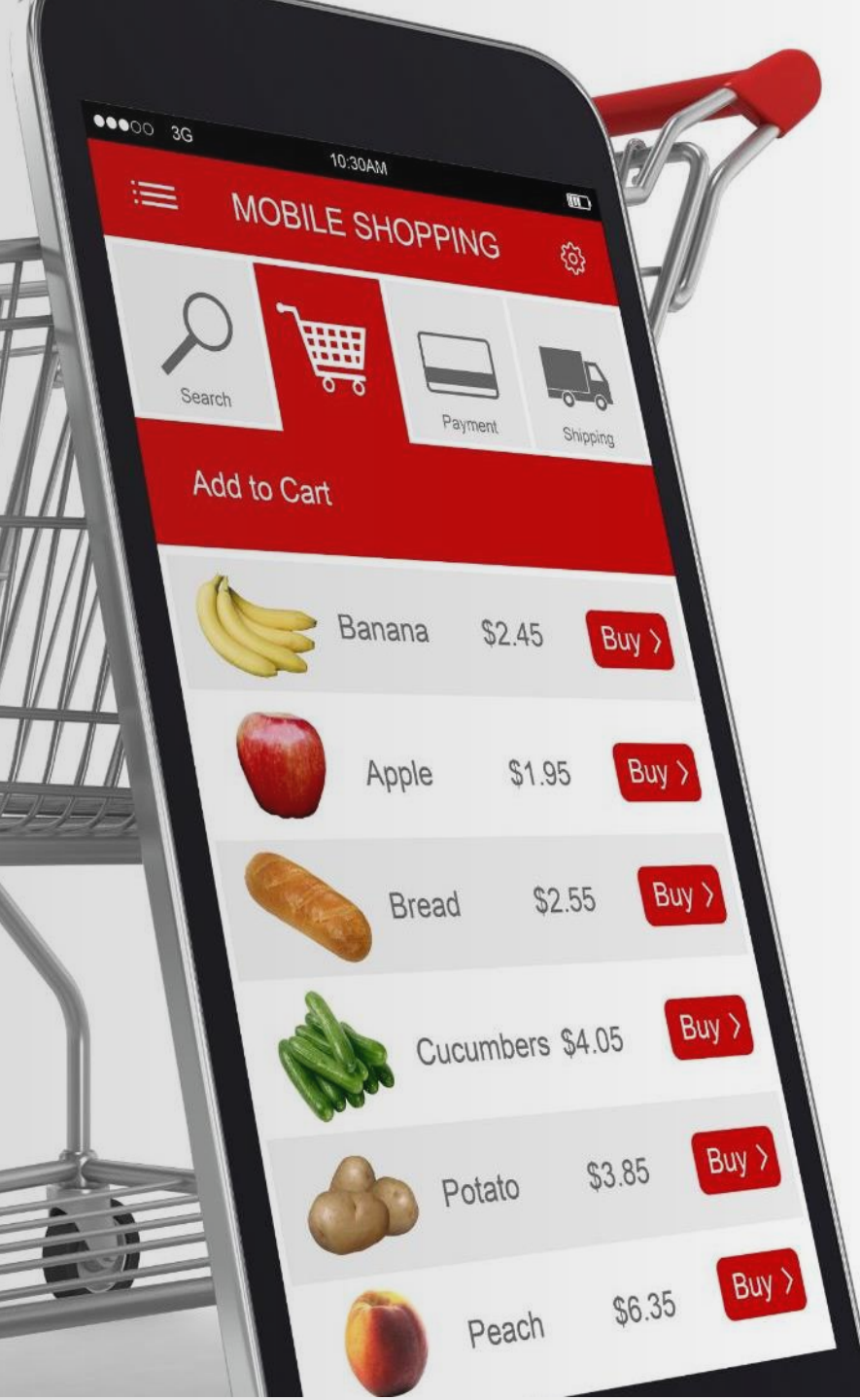
Allow users to
**select
multiple
products
and
compare
side-by-side**





EASY TO COMPARE

Instead of **comparing in the shopping cart**, which doesn't allow users to see benefits of each product





Ways to figure out if it's right for me



49 -



HELP ME DECIDE

Reviews make it easier to make decisions, because they offer guidance from people who have tried a product





HELP ME DECIDE

**Testimonials
from experts
and
influencers
make products
relatable**





Convenient options to get products





DELIVERY OR PICK UP

**Same day
delivery**



DELIVERY OR PICK UP

Order online pick up in store or curbside



Simple returns



SIMPLE RETURNS

**Get money
back
quickly**





SIMPLE RETURNS

Free return shipping





SIMPLE RETURNS

**Try before
you buy**



SO WHAT?

3

5 Ecommerce Tips

Your Ecommerce Experience Should...



Use consumer-oriented language to make it easy for shoppers to **find** what they want



Give shoppers easy ways to **compare** products – and the benefits of each option



Provide **reviews** and testimonials from trusted sources to help shoppers understand if a product would be a good fit for them



Give shoppers a variety of options for **delivery and pick-up** and make sure timing is clear



Make **returns** hassle-free





5 Questions To Consider

You may want to dig deeper into topics like...

1. What is the best way to **organize your site** for shoppers and how does that differ from the in-store experience?
2. What **tools and content do shoppers need** to understand if a product is right for them based on key attributes of your category?
3. Can you help people understand if the products they want are **in stock at their nearest store**?
4. What do shoppers need to know about your **return policy** and their options?
5. What are the implications of **cultural differences** and preferences in local markets that should be considered in the design?