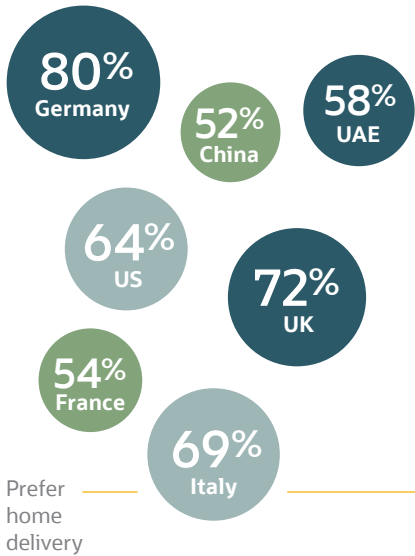


# Anatomy of Change

## Understanding Consumer Behavior in the New Next 2020

### EMEA Spotlight

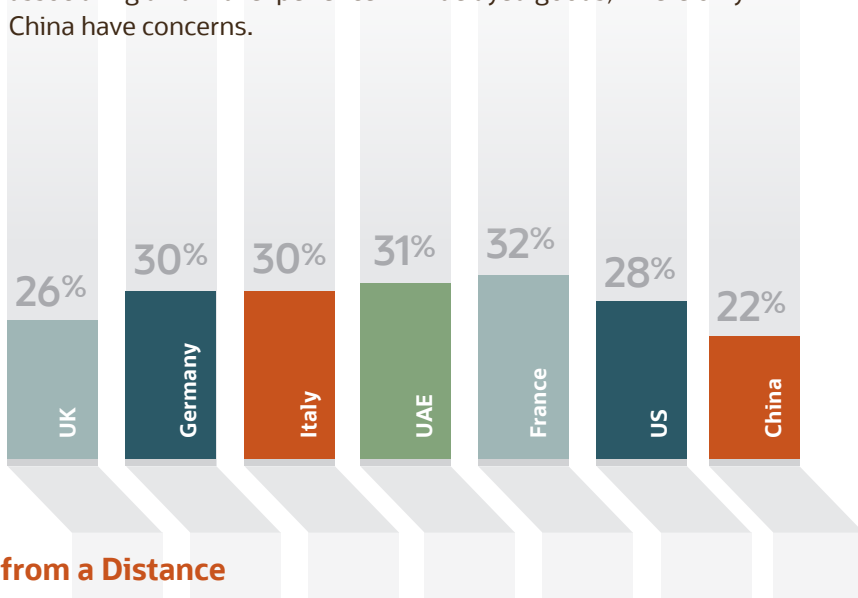
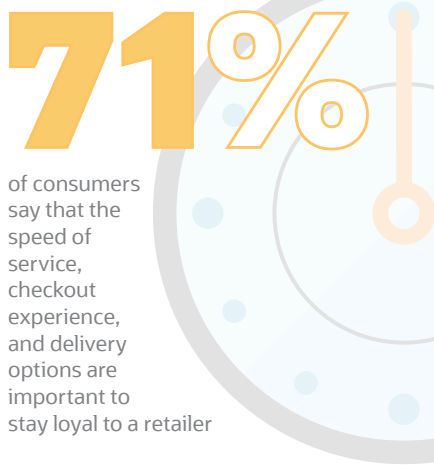
2020 has been a year to remember and to forget. The pandemic had a dramatic impact on the retail industry and the consumer experience. Consumer expectations—online and offline shopping experiences—have dramatically influenced and inspired new behaviors for consumers. The year remains dynamic and unexpected, continuing to redefine what it means to have a superior consumer experience, from speed and selection to safety and sanitation. **This regional spotlight shines a global lens at how countries in EMEA fare compared to the US and China.**



### The Pandemic Effect: Shopping for Speed and Safety

While many consumers appear eager to return to “normal” shopping habits, consumers and retailers alike continue to explore low- or no-contact delivery methods, as well as new ways to minimize shopping time in stores. Home delivery is still preferred by 66% of consumers globally, but in EMEA, consumers in Germany prefer home delivery by 80% compared to 54% in France.

Around the world, 71% of consumers say that the speed of service, [checkout experience](#), and delivery options are important to stay loyal to a retailer. Negative experiences, like out of stocks and limited product [availability](#) or extended shipping time, drive purchasing decisions as well, and 33% of consumers say that delay of goods equates to a bad shopping experience. Consumers in the UK are only slightly more forgiving at 26%, associating an awful experience with delayed goods, where only 22% in China have concerns.



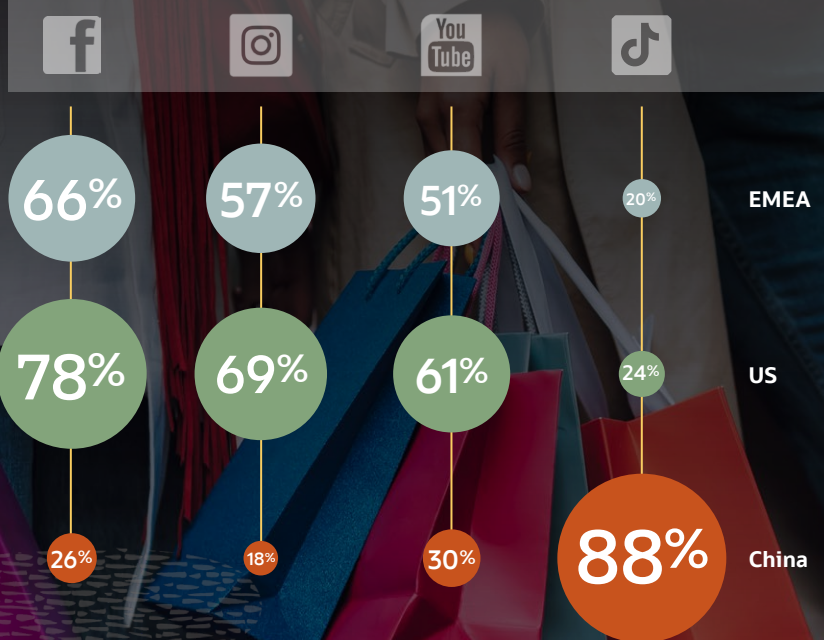
### The Social Influence: Discovery from a Distance

Social distancing protocols may drive physical separation, but they naturally haven’t dampened the desire to connect with others. Predictably, social media has become more central to how consumers interact with each other and how they explore the world around them. As more people have stayed home, social media use has expectedly increased. Unable to meet in person, people turn to social channels to connect with friends, share personal updates, get news, and engage in day-to-day conversations. During the pandemic, 48% of consumers around the world reported discovering new brands on social media. While a whopping 80% of UAE and 75% of China consumers embraced social media to find new brands, only 19% did so in Germany.



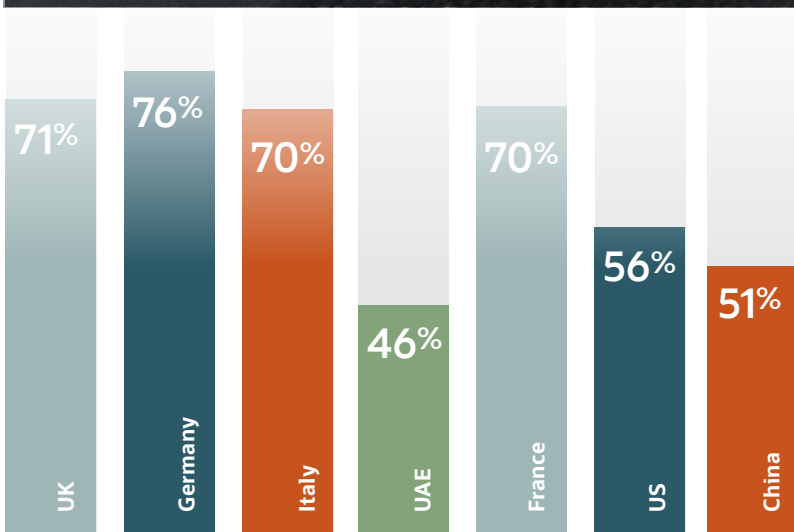
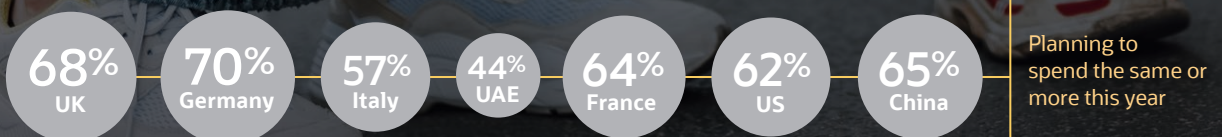
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By far, consumers worldwide discovered new brands on Facebook first (65%), then Instagram (53%). EMEA and US consumers followed suit, but China leaned into TikTok (88%) as its social media engine of choice.



## The Holiday Impact: An Unprecedented Season

In an unprecedented year for retail, all eyes are on the holiday season. Consumers plan to spend as much on holiday gift-giving as in 2019. Consumers stated that they intend to shop BOTH online and in stores over a more extended period this holiday season. Despite the challenges of the year — or perhaps because of them — consumers are trying to create a memorable holiday season. More than half globally (58%) are planning to spend the same amount or more versus 2019 — this represents 70% of consumers in Germany, 68% in the UK, and 64% in France. Consumers in China (65%) and the US (62%) are also planning similar spending.



Around the world, more consumers than ever before are planning NOT to return holiday gifts. With 63% globally keeping gifts, at least 70% of consumers in France, Germany, Italy, and the UK plan to keep their gifts, only 46% in UAE plan to do so. Over half of consumers in the US and China plan to keep their gifts this holiday season.

Source: [Anatomy of Change: Understanding Consumer Behavior in the New Next 2020](#). 5,143 consumers, 10 countries. The survey was conducted by independent consultancy, [Untold Insights](#)

Plan to return no gifts:



Access the full report, [Anatomy of Change: Understanding Consumer Behavior in the New Next 2020](#), for an in-depth analysis.