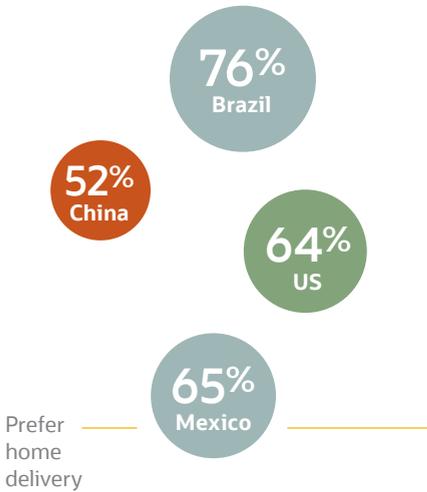


Anatomy of Change

Understanding Consumer Behavior in the New Next 2020

Latin America Spotlight

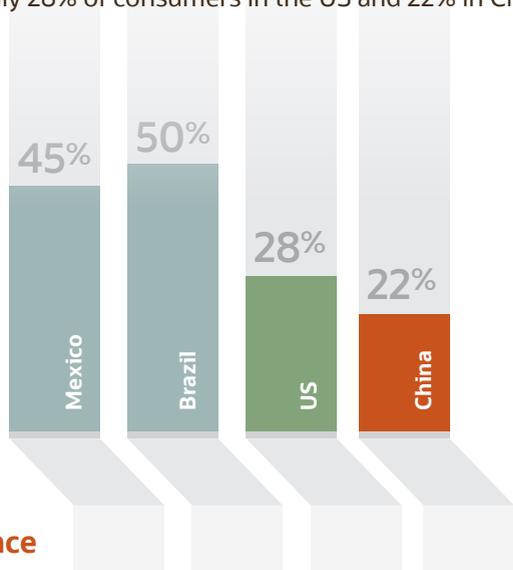
2020 has been a year to remember and to forget. The pandemic had a dramatic impact on the retail industry and the consumer experience. Consumer expectations — online and offline shopping experiences — have dramatically influenced and inspired new behaviors for consumers. The year remains dynamic and 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 Latin America 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, with consumers preferring home delivery in Brazil by 76% compared to 65% in Mexico. Consumers in China are less interested in home delivery (52%).

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 Latin America are not very forgiving (50% in Brazil, 45% in Mexico), associating a lousy experience with delayed goods compared to only 28% of consumers in the US and 22% in China.



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 75% (China) and 72% (Mexico) of consumers embraced social media to find new brands, only 37% did so in the US.



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



The Holiday Impact: An Unprecedented Season

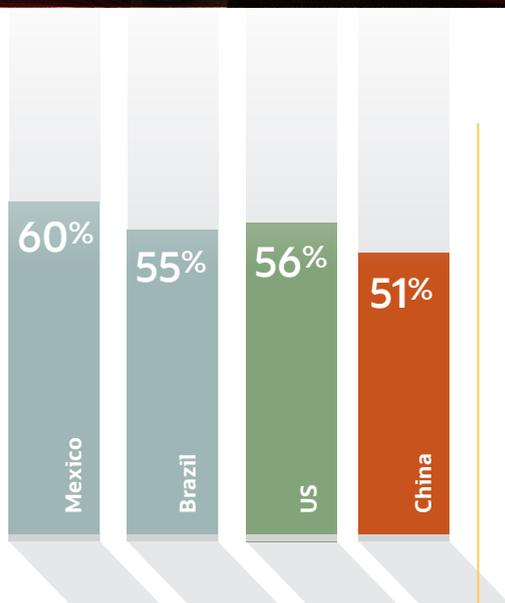
In an unprecedented year for retail, all eyes are on the holiday season. Consumers plan to spend as much on holiday gift-giving as in 2019. Consumers stated that they intend to shop BOTH online and in stores over a more extended period this holiday season. Despite the challenges of the year — or perhaps 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 43% of consumers in both Brazil and Mexico, but over 62% (US) and 65% (China).



Globally, only

36%

plan to go to the store to execute their returns.



Around the world, more consumers than ever before are planning NOT to return holiday gifts. With 63% globally keeping gifts, at least 60% of consumers in Mexico but only 51% in China plan to keep what they receive.

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.