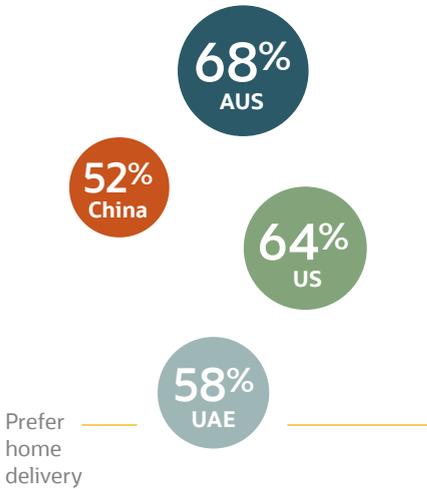


Anatomy of Change

Understanding Consumer Behavior in the New Next 2020

APAC Spotlight

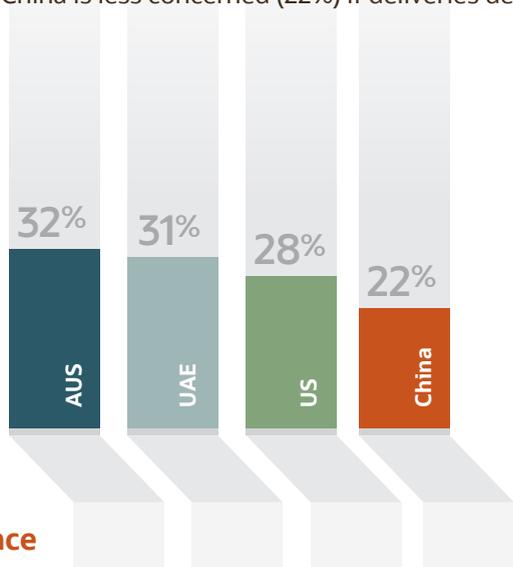
2020 has been a year to remember and to forget. The pandemic had a dramatic impact on the retail industry and the consumer experience. Consumer expectations — online and offline shopping experiences — have dramatically influenced and inspired new behaviors for consumers. The year remains dynamic and 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 APAC fare compared to the US and the United Arab Emirates.**



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 Australia and the US, consumers prefer home delivery by 68% and 64%, respectively, compared to 52% in China.

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 Australia (32%) and the United Arab Emirates (31%) are in line with global consumers, associating a lousy experience with delayed goods. China is less concerned (22%) if deliveries delay.



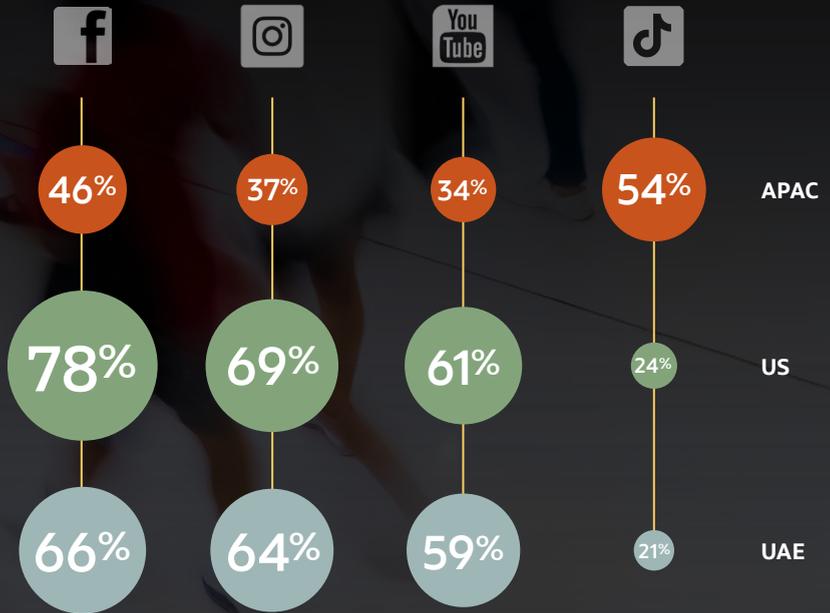
The Social Influence: Discovery from a Distance

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 consumers in the United Arab Emirates and 75% in China embraced social media to find new brands, only 32% did so in Australia.



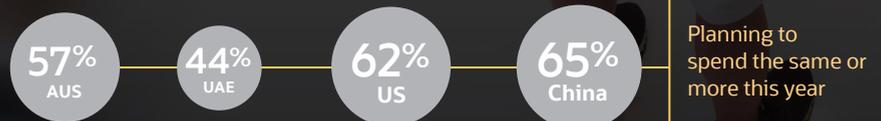
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By far, consumers worldwide discovered new brands on Facebook first (65%), then Instagram (53%). APAC consumers leaned into TikTok more than other regions:



The Holiday Impact: An Unprecedented Season

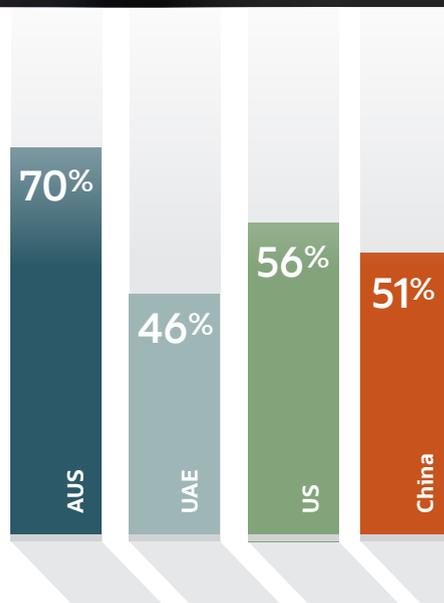
In an unprecedented year for retail, all eyes are on the holiday season. Consumers plan to spend as much on holiday gift-giving as in 2019. Consumers stated that they intend to shop BOTH online and in stores over a more extended period this holiday season. Despite the challenges of the year — or perhaps 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 65% of consumers in China and 57% in Australia, but only 44% in the United Arab Emirates.



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 70% of consumers in Australia and 51% in China also plan to keep what they receive, but more returns are expected in the United Arab Emirates.

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.