

The Digital Consumer Journey: Who is Behind the Crisis-Inspired E-commerce Surge

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INTRODUCTION

Scope of Digital Consumer

Methodology for this report

Key findings

THE RISE OF E-COMMERCE DURING THE CRISIS

COVID-19 crisis is driving radical shifts in consumer shopping behaviour

E-commerce posted a double-digit percentage point increase during crisis

About half of consumers purchased across the five categories explored

Consumers turned to mobile more for purchases during COVID-19

Xennials led pandemic-inspired shift towards digital purchases

Baby boomers, however, are behind the digital boom at the research step

INDUSTRY SPOTLIGHT: APPAREL AND PERSONAL ACCESSORIES

Retail closures affect disproportionately fashion retail during pandemic

Despite strong penetration, e-commerce continues to perform well

Computer gaining in importance for apparel and personal accessories

Consumer spotlight: apparel shoppers follow broader channel shift trends

Virtual try-on features enable brands to mimic in-person fit experience

Case study: SenseMi offers virtual fitting in store and online environments

Case study: AI-powered Fit:Match tech reduces need to try on clothes

INDUSTRY SPOTLIGHT: BEAUTY, HEALTH AND PERSONAL CARE

Beauty, health and personal care has been slower to shift to e-commerce

Mobile is cementing its role in path to purchase for beauty and health

Consumer spotlight: 30-44 year-old consumers driving digital shift

Crisis forced brands to pivot consumer engagements to digital channel

China pioneered and still leads the way on the livestreaming trend

Case study: JD.com teams up with video platform to boost livestream sales

Markets to watch for beauty, health and personal care

INDUSTRY SPOTLIGHT: CONSUMER ELECTRONICS AND APPLIANCES

Consumer electronics is the e-commerce first mover across markets

Consumer electronics and appliances posted greatest digital leaps

Consumer spotlight: baby boomers closing digital gap for these products

Tech products are the most common click-and-collect purchases

Case study: Best Buy added curbside pick-up in light of closures

INDUSTRY SPOTLIGHT: FOODSERVICE DELIVERY AND TAKEAWAY

Digital channel becomes a lifeline for struggling foodservice operators

Mobile becomes central to digital ordering strategy in foodservice

Most consumers have one to two mobile apps for foodservice ordering

Consumer spotlight: millennials continue to drive the shift to mobile

Delivery capabilities emerge as differentiator for foodservice operators

Consumer spotlight: Chinese consumers most open to robotic delivery

Case study: Meituan Dianping unveils robotic delivery in February

Rise of ghost kitchens point to a delivery-optimized future

Case study: Rebel Foods maps path to delivery-only foodservice success

Markets to watch for foodservice delivery and takeaway

INDUSTRY SPOTLIGHT: TRAVEL

Global shutdown brings travel to a standstill

Online travel and mobile sales not immune to crisis

Digital cementing its lead as the channel for travel research and purchase
Consumer spotlight: 60+ group closing the digital gap during the crisis
Digitalisation is the way forward

KEY TAKEAWAYS

How companies should respond to these shifts brought by the crisis
Digitalisation is at the core of these efforts to reinvent business

APPENDIX

Digital Consumer analysis regularly leverages multiple methodologies
An overview of methodologies often used in Digital Consumer analysis (1)
An overview of methodologies often used in Digital Consumer analysis (2)

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