NEW & EMERGING TRENDS IN ECOMMERCE
WHAT IS THIS REPORT ABOUT?
This report analyzes online shopper experience, new shopper trends in 2020, and explores possible future developments in 2021 and onward. Using data from social media, consumer reviews, and other online media, this report provides actionable consumer insights through the lens of three key industries: FMCG, Alcoholic beverages (AlcBev), and Automotive.

WHAT IS THE OBJECTIVE OF THIS REPORT?
The purpose of the report is to answer critical business questions asked by our clients, partners and industry leaders about new and emerging trends in Ecommerce. Key questions we aimed to address included but were not limited to: how consumers’ perceptions of ways to buy online shifted, which platforms consumers use, and how Ecommerce changed during the pandemic.

WHY DOES THIS REPORT MATTER?
Ecommerce has been accelerating for many years, and 2020 further sped up these changes in shopper behavior as a result of the COVID-19 pandemic. Linkfluence sought to explore opportunities for brands looking to improve their Ecommerce and business as a whole. Additionally, through this report, Linkfluence aimed to demonstrate the depth, relevancy, and actionability of AI-enabled consumer insights to decision makers throughout a brand organization.

HOW WAS THIS REPORT CREATED?
This report was produced by the Global Insights Team at Linkfluence, using a) data from millions of social media posts, gathered by Radarly, a Linkfluence proprietary social listening software, and b) the expertise of our researchers. The listening is focused on the consumer voice only and targets three sectors:
① FMCG
② AlcBev
③ Automotive
WHY SOCIAL MEDIA INTELLIGENCE?

A GROUND-BREAKING APPROACH TO INSIGHTS THAT MATCHES THE SPEED OF MODERN DIGITAL CONSUMERS’ LIFESTYLES.

As the largest focus group, the web offers:

- Massively significant and diverse data
- Unprecedented speed of delivery
- An unsolicited, objective research asset

WHAT MAKES SOCIAL INTELLIGENCE A MUST-HAVE PART OF THE MODERN RESEARCH TOOLKIT?

Social intelligence is a powerful approach to insight with relevance, depth, and breadth, and a game-changing tool for strategy, planning, marketing, and communications.

Linkfluence combines big data, artificial intelligence, real-time visualization, and human expertise to analyze consumer attitudes and behaviors, and adapt this analysis to the needs of the user.

100m+ SOCIAL MEDIA PROFILES

200m+ POSTS PER DAY

A diversity of consumer data from mainstream social media, product reviews, community forums, and specialty sites, including Facebook, Twitter, Instagram, Google Reviews, Amazon, and many others.

UNSTRUCTURED RAW DATA
- Words
- Phrases
- Images
- Hashtags
- Emojis
- Locations
- Links
- Behaviors
- Demographics
- Times
- Platforms
- Devices

DATA STRUCTURING TECHNOLOGY + PROCESS
- AI
- Data science
- Market expertise

ACTIONABLE INTELLIGENCE
- Psychographics
- Conversation drivers
- Topics and emotions
- Tribes + communities
- Audiences
- Influencer topic authority
- Trend prediction
- Occasions
- Brand and category attributes
WHAT'S THE TIMEFRAME AND DATA ANALYSED FOR THIS REPORT?

Scope | English (US and UK)
Timeframe | January 2020 – December 2020

LISTENING SCOPE

📍 US and UK
(locations are listed as separate entries)

Language

 ↔ English

PLATFORMS

-platform

Twitter

-Instagram

Facebook

-Forums

Reviews

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This report is structured through three key industries: FMCG, AlcBev, and Auto. Within each industry, we cover the following sections:

① OVERVIEW
In this section we conduct a quantitative analysis of the industry’s main companies and brands. This section includes reviews of the top websites where consumers do Ecommerce in the industry.

② CONSUMER BEHAVIOUR AND GENERAL TRENDS
Here we dive into general category trends common to all consumers within the industry. We also spot general trends in consumer behaviour.

③ CONSUMER PURCHASE JOURNEY
This section answers questions about what customers lack in existing products and services by exploring what customers care about, what they like, what they don’t like, what they miss, and what they want to change. We categorized this online journey through three key steps: pre-purchase, purchase, and post-purchase.

Using social media is more effective because users post and write feedback in a comfortable environment. People are not afraid to express their opinions and say what they think and feel; there is no bias like in interviews. In short, we will observe clients in their environment. That’s why it’s easier to find hidden risks, minor problems that make consumers switch to competitors, use a different product, etc. We’re going to put ourselves in the shoes of our clients and walk through the purchase journey:

• Before purchase
• During purchase – the “hidden” risks and negative aspects, why consumers can pass to competitors or come back into traditional shopping purchases (expectations did not coincide with reality)
• After purchase – we will understand what task our product must solve at the moment, what the clients lack.

④ WHO ARE OUR CONSUMERS?
Here we identify the key tribes driving each industry – exploring what they have in common, what they need, and how they differ.

⑤ NEW AND EARLY TRENDS
This section analyzes new trends in Ecommerce and highlights early signals for emerging trends.
Overview: What we know about Ecommerce

Today, Ecommerce touches almost every aspect of consumers' daily lives, and during the pandemic in 2020, changing norms and new ways of purchasing online emerged.

Overall, consumers have been increasingly migrating to online platforms, particularly to buy food products.

In what has seemed to many to be an endless COVID crisis, consumers have expressed growing needs of confidence and self-empowerment. Many consumers purchased online to feel better about their life circumstances instead of just satisfying a functional need.
INTRODUCTION

Discussions about Ecommerce exploded in all three industries, growing by 135.6% vs. 2019. The outbreak of COVID is the main trigger of this transformation, resulting in a huge leap of 311% in March compared to February 2020, triggered by city-wide quarantines and closure of brick and mortar stores. While discussion about online shopping has decreased since May of 2020, the level is still much higher than in 2019.

OVERVIEW: WHAT WE KNOW ABOUT ECOMMERCE

FMCG INDUSTRY LEADS IN ONLINE CONVERSATIONS ABOUT ECOMMERCE

Most online discussions about Ecommerce were related to FMCG. AlcBev and Automotive combined only made up 58% of conversations in the US, and 59% in the UK.

AlcBev had a higher percentage in the UK (32%) vs. the US (24%), and Ecommerce related publications about the Auto industry are relatively much smaller (though still critical to the industry) with most discussions coming from the US (20k vs. 3.6k of posts).
THESE TRENDS DOMINATED ALL THREE INDUSTRIES

SMARTPHONE SHOPPING GROWS EVEN FURTHER
Shopping online using a smartphone saw an increase of 126%.

GOOGLE PLAY REVIEWS EXPAND
Online shopping application reviews on Google play increased by 238% over the last year.

CONSUMERS SEEK SELF-INDULGENCE
Self indulgence showed a +154% evolution compared to last year.

E V O L U T I O N  O F  T H E  T R E N D
‘A WAY TO TREAT YOURSELF’ IN 2020

0 20K 40K 60K 80K
01/02 01/04 01/06 01/08 01/10
What prevents consumers from having complete satisfaction during each stage of the purchase journey? While these risks are different for each sector, there are a few similarities that are important to highlight.

**BEFORE PURCHASE**

Price was identified as the main barrier before a purchase. Most consumers prefer food delivery services, but because they find it quite pricey, they only use it for special occasions.

Online grocery shopping consumers are discouraged that price and delivery costs are increasing, especially when people are encouraged not to go into brick and mortar stores.
THE LEADING RISKS IN EACH STAGE OF CONSUMERS’ JOURNEY

DURING PURCHASE

Delivery was identified as the main theme during a purchase. Consumers are often angry when late deliveries occur - oftentimes with little to no explanation.

Consumers perceive this as disrespect for their needs and that the brand does not care about its customers. This is especially true when the problem isn’t solved, and no one can give a precise answer.

Also, many consumers often had their orders delivered to the wrong places or people - adding to frustrations.

Overall, consumers appreciate new technology and services when they are mentioning deliveries, for example, payment over the phone or via the card machine, without personal contact with a human.

Delivery should be reactive, if it’s written that the store is open, they should be available to do a delivery, or put a notification, when the delivery can be done.

AFTER PURCHASE

During the post-purchase stage, client services emerged as the top trend.

Problems arise in any case, and it is essential to consumers on “how” the company actually solves the problems.

People try to find reliable services. Faced with a serious problem once buyers go to competitors.

Consumers feel a personal touch when a delivery is done, usually paying attention to small details. For example, how companies leave contactless deliveries at drop off locations.

If something goes wrong, consumers want the company to do something as an excuse. If there is no such step, consumers will remember this moment and tell it to their friends or publish it as a negative review of this company.
CONSUMER JOURNEY DIFFERENCES IN FMCG, ALCBEV, & AUTOMOTIVE

In terms of Ecommerce, the FMCG and AlcBev industries have a lot in common. First of all, many consumers feel they do not have enough information about alcohol delivery. For example, they wonder what times it is even possible to order alcohol or how their ID is going to be checked. Another key difference is that FMCG consumers desire a wide variety of products, tastes, and flavors from known brands. For alcohol consumers, more like to find some interesting new tastes from niche and local small brands.

For automotive, the consumers’ journey is quite different to other industries. The convenient, time-saving and hassle-free online shopping experience is no doubt attractive to consumers in other industries. However, buying a car is a serious and expensive step for many consumers and buying one online is still novel to most people – even with the pandemic.

BEFORE PURCHASE
Many consumers have limited ideas about where they can buy and how they can buy cars online. Many old-fashioned consumers are not big on buying a car online as it is a big deal and they think it is a must to feel, see, touch and test drive the car before making their decision.

DURING PURCHASE
While delivery is one of the most important processes for Ecommerce in all 3 sectors, consumers demand for more transparency and communication for cars as it is quite common to have painful delivery experience and for an important deal like a car they would like to feel more reassured about their order. Also, product quality control before delivery becomes more important for online car shopping.

AFTER PURCHASE
Finally, for cars, people worry about the refund process and all other concerns in the "after purchase" step, such as registration.
Ecommerce in the FMCG industry has experienced significant growth during the pandemic time, with an evolution of +151% (2019 vs 2020). Ecommerce in the FMCG industry shows growth with an average evolution of +10.1% since September.
"Fruit and Vegetables" is the most popular food category in Ecommerce for the FMCG industry. In terms of evolution, the most visible category is “Household Essentials,” showing the most significant increase.

This data illustrates that consumers started to use grocery delivery actively for products that do not have an expiration date.
PepsiCo is the most visible company in terms of the number of posts. PepsiCo’s visibility mainly comes from brands such as Pepsi (41%), Cheetos (7%) and Doritos (7.4%). Ferrero follows PepsiCo to be the second most discussed brand. Nutella contributes 76% of total Ferrero volume.

For evolution, Mondelez is the fastest growing brand in Ecommerce (47% of total Mondelez volume, +78% vs. 2019), thanks to the widely appreciated desserts made by Oreo and the sharing of Oreo’s coupons.

The visibility of Nutella and Oreo-derived food (as one of the most mentioned brands) shows us that consumers like to have indulgent food to treat themselves during the stressful lockdown.

These brands are not just mentioned by consumers, but also by craftsman enthusiasts (small business owners), who did their own product/desserts with Nutella and Oreo for selling and online delivery.
This trend of food indulgence during the difficult and stressful time of the pandemic is confirmed by the growing number of posts on this topic (+60% of evolution 2019 vs. 2020). During the lockdown period, people have reinforced the link between food and quick mood uplifting. As a result, it has become one of the most accessible and easy ways of self-indulging.

Kraft also has a significant increase (+79% vs. 2019). Consumers didn’t highlight a specific product, they just generally wrote that they love Kraft Heinz products. Most of the Kraft products were mentioned in the snacks’ related posts and delivery options of already made products and grocery.

We can observe a correlation between the two graphs: Procter & Gamble’s growth and the growth of Household Essentials. Procter & Gamble had a strong growth (+44% vs. 2019) due to the increasing consumption of hygiene products and the skyrocketing demand for toilet papers. Also, consumers actively discuss Pampers brand (+31% vs. 2019) and give advice on blogs to help people find good deals.
DEMOGRAPHICS

Females represent 54.2% of FMCG’s Ecommerce conversations. The age group 25-34 is the most active for females, while the 55-64 age group comes first for male.

Many consumers turned to doing their grocery online since the pandemic – especially for females and people over 35-years old.

EVOLUTION OF AGE CATEGORIES (2019 vs 2020)

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>+82.9%</td>
</tr>
<tr>
<td>25-34</td>
<td>+126.2%</td>
</tr>
<tr>
<td>35-44</td>
<td>+145%</td>
</tr>
<tr>
<td>45-54</td>
<td>+158%</td>
</tr>
<tr>
<td>55-64</td>
<td>+158%</td>
</tr>
<tr>
<td>65+</td>
<td>+176.5%</td>
</tr>
</tbody>
</table>

EVOLUTION OF GENDERS (2019 vs 2020)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>+215.4%</td>
</tr>
<tr>
<td>Female</td>
<td>+248.5%</td>
</tr>
</tbody>
</table>
The Ecommerce market is very competitive. Consumers frequently change websites if they can’t find their favorite products or so they can find a better price, faster delivery, and to try something new.

Because of the power of social media, even the small mistakes from big brands may convince consumers to use other websites for online shopping. For example, take this instance from Walmart. The brand published a tweet by mistake (from Walmart official account). Consumers quickly noticed this tweet and had negative reactions and emotions about it.
WHAT DO CONSUMERS WITHIN FMCG THINK ARE THE MOST POPULAR WEBSITES?

Knowing what consumers think about each website can help brands understand why sales are declining or increasing through a particular website and where it might be better to do promotions. Two examples of this in action can be seen through Amazon and Walmart.

**Amazon**

Amazon is one of the most popular platforms for the FMCG sector in the US. Consumers enjoy how they can find almost everything on Amazon. They even have the possibility to order groceries through Amazon Fresh. Many consumers mention how convenient Amazon’s services are – especially how fast their delivery is.

In terms of negative sentiment, consumers express how they sometimes experience issues with Amazon support. It’s oftentimes difficult to solve problems and the solution can be hard.

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Walmart is the most controversial site. Consumers often write negative reviews about it. For example, when someone orders groceries at Walmart they have to wait too long. Publishing these negative sentiments on Twitter, many consumers receive recommendations from friends and other random users to explore other grocery delivery services.

Also, consumers are not satisfied with grocery pick-up service, because it doesn’t work well and consumers have to waste their time.

In addition to the problems with the service, users also mentioned that Walmart is not aligned with their values. Most of their products are made in China and some consumers can’t support them ethically.

Despite the #boycottwalmart trend some people continue to use this website for deliveries because there are a big variety of products.

The insights gleaned from Amazon and Walmart as examples confirm the fact that social networks have a large impact on consumers’ choices and the Ecommerce market is highly competitive.
CONSUMER BEHAVIOUR & GENERAL TRENDS

WHAT ALTERNATIVES TO FOOD DELIVERY EXIST?

Grocery delivery experienced significant growth during the first lockdown and has now become almost as popular as food delivery. However, there is a mild inconvenience factor associated with grocery delivery when compared to food delivery leading some consumers to reserve online grocery shopping for non-food items like pet food or household essentials. Even with the popularity surrounding food delivery, consumers showed that they are most concerned with saving money.

As food delivery is a pricey option, it is typically reserved for when consumers wish to treat themselves. Meal kits adequately address the problem of value for money. Portioned ingredients, cooking instructions, and the experience of cooking itself gave consumers something to do and allowed them to choose different meals for each day. Consumers are attracted to meal kits for their lower price and environmentally conscious efforts to reduce food waste.
DIVING IN DEEPER: GENERAL CONSUMER BEHAVIOR

Because of lockdowns, many shoppers spend more per visit or delivery but buy less frequently. This is because consumers wanted less travel and human contact. They also aimed to avoid delivery fees and possible plastic consumption.

For consumers, online grocery shopping avoids impulse buying and helps some realize that they do more impulse purchases when they go to the actual grocery store. Consumers generally tend to have fewer impulse purchases when shopping online since they can carefully think about what to buy before placing their order. However, the convenient online shopping and the depressing isolation (or some other issues in their life) drive some consumers to lose their self-control and make impulse purchases.

Because of the pandemic, consumers like to stay at home, causing them to rethink their shopping behavior and to be more socially responsible. One example of this behavior in action is how consumers are buying more from local and small businesses to support them during lockdowns.

Another example of this behavior is seen through imperfect foods - a subscription-based home-delivery service for discounted "ugly" fruits and vegetables which aims to reduce food waste - is emerging since the pandemic (+1.89% vs. 2019).
RECOMMENDATIONS

Why not create the same meal kit ingredient boxes in an ordinary grocery shop? At first, to test the relevance of this idea, orders can be created in advance so that the shop staff can have time to prepare the box of ingredients. In this way, consumers can only choose the dish they would like to have and not worry about forgetting to buy an ingredient or figuring out the correct proportion.

CONSCIOUS SHOPPING

Conscious shoppers, thanks to Ecommerce, have reduced impulse purchases. In contrast, isolation has also created a situation in which bad moods influence a sense of indulgence and impulse purchasing for delicious snacks.

SPENDING HABITS

Shoppers have begun to spend more per purchase, shop less frequently to reduce delivery costs, like to take care of the environment and avoid unnecessary contact.

LOCAL SUPPORT

Supporting local and small businesses impacted by government imposed lockdowns.
CONSUMER PURCHASE JOURNEY

FMCG share of voice (SOV) at different phases

**BEFORE (2.9%)**
- Price
- Visibility on social media
- Reviews
- Variety of products on platforms
- Attractive brands’ activations
- Brand image (CSR strategy etc.)
- Delivery area
- Payment fee

**DURING (93.3%)**
- Delivery
- Convenience
- Website design
- Click & Collect services
- Product’s description

**AFTER (1.8%)**
- Client service
- Mistakes in orders
- "No-contact" and "right to the door" delivery
- Product shelf life
CONSUMER PURCHASE JOURNEY

→ BEFORE PURCHASE

01

CHANGES IN INFLUENCER PROMOTION

The first most visible trend is how bloggers mention where they buy products. Rather than just mentioning and advertising the product, they now need to communicate the location, website, or marketplace where their followers can buy a product.

02

REVIEWS MEAN THE WORLD TO CONSUMERS

Consumers now don’t always have the possibility to touch and see the product; that is why reviews from other consumers have become even more important than before. People make purchasing decisions based on reviews and advice. For example, people read Amazon's review, even if they don't always buy it from Amazon.

Some consumers seem to not always trust certain sites because there are many fake reviews especially, among the positive ones. This is why sometimes negative reviews can have a more powerful influence on consumers’ decisions. In the end, consumers want to see honest reviews.

YouTube is also a popular platform where people want to find some advice and reviews about products. Another trend discovered was that some consumers do not have motivation or reasons to spend time writing reviews. Most of the time, they only do a review when they do not like a product.
CONSUMER PURCHASE JOURNEY

→ BEFORE PURCHASE

03

THE POWER OF A “ONE STOP SHOP”

When consumers choose which platform or website to use, they pay special attention to if they can buy all the necessary products on one website. For example, all essential cooking ingredients.

04

LIMITED TIME OFFERS (LTOs)

Limited-edition brand activations with influencers for major holidays like Valentine’s Day are an excellent stimulation for consumers to order products.

05

CORPORATE SOCIAL RESPONSIBILITY MATTERS

Consumers are attracted by powerful and thoughtful Corporate Social Responsibility (CSR) strategies. Today, consumers are tired of meaningless purchases. They desire to be part of something greater than themselves – making the world a better place through a purchase.

06

LOSE CONSUMERS WITH TOO MANY FEES

A large portion of customers pay attention to payment fees, no matter how small. A variety of consumers would prefer services and websites with fewer transaction fees.
CONSUMER PURCHASE JOURNEY

→ BEFORE PURCHASE

07 OPPORTUNITIES FOR PRODUCT DELIVERY

In the US, there are some areas where consumers don’t have delivery services. Many consumers are ready to do home delivery, but just don’t have the possibility to do so because of their location.

Covering more areas is a potential strategic opportunity for brands.
1. CUSTOMER-FRIENDLY WEBSITES
Consumers don’t want to spend too much of their time on online purchases. It’s important to have an intuitive website interface.

2. CLICK & COLLECT SERVICES
Click & Collect services are not comfortable or convenient for many consumers. Most trends around this topic showed that consumers had overall negative emotions about the process.

3. BEING CLEAR IS EVERYTHING
For consumers, product information must be fully described and transparent. Website information is omitted or written in small print, forcing customers to misunderstand what they are purchasing.

CLICK & COLLECT VS. HOME DELIVERY?
Click & Collect is very popular in the UK (20.4K posts vs. 1.8K posts in the US)

While home delivery is booming in the US.
CONSUMER PURCHASE JOURNEY

→ AFTER PURCHASE

ORDER HICCUPS

The main disappointment after the purchase from users was that there were lots of mistakes in their orders. Some products were missed or replaced without the consent of the buyer. For consumers, if some items can’t be delivered, they should not be available on the page online. Also, consumers believe they should be compensated for any delivery shortcomings.

Another theme was that consumers were discouraged that certain websites and apps didn’t work correctly. For instance, products that were out of stock were still displayed as available or items that were not delivered at all.

Consumers are often outraged when they discover that their food was stolen during the delivery or that something may have been missed and the company does nothing to smooth things over.

EASE OF DELIVERY

Consumers expect to have delivery right at their door because it’s most convenient for them. They don’t want to spend too much time searching for it and going places just to pick it up. Many consumers still want to follow and respect “no-contact” delivery because of the virus. Also, consumers believe it should be easy to cancel deliveries.

Finally, consumers ran into many instances where their order deliveries were expired.

TRUST IS THE KEY

Consumers pay special attention to their bank accounts and need to trust the service after the fact to ensure they were charged correctly. For consumers, all payment systems – subscription based and not subscription based - should be very transparent and provide notifications when their subscription is going to extend.
KEY LEARNINGS & RECOMMENDATIONS

→ BEFORE PURCHASE

01 GET CREATIVE
Giveaway boxes are an excellent opportunity to try new products and online delivery. This practice is very popular for cosmetics brands and could be for FMCG brands as well. Another idea is gifting food delivery cards or meal kits for employees, friends, or family.

02 LTOs
Depending on how the site is structured, follow the latest products and update the assortment so that consumers have the opportunity to buy the newest and latest products on your website. Since it was found that holidays based promotions are well received by consumers, it may be relevant to create limited editions, special festive packaging, or collaborations with influencers.

03 COLLABORATE
Brands and websites are mutually interested in collaborating with each other to attract and retain customers. This is thanks to exciting benefits these collaborations have for customers such as joint promotions, exceptional customer service, and appealing to consumers’ values through a strong corporate social responsibility strategy.

04 DELIVERY AREAS AND FEES
Finally, there is a large opportunity for retailers to increase the delivery area of their services and ensure fair payment fees and processes.
The role of reviews is growing in the Ecommerce space but consumers oftentimes don’t want to spend time on something for nothing. The question then becomes for brands: what incentives can be employed to encourage consumers to write reviews?

Some ideas brands could employ:

- Create benefits for consumers and indicate the value of their review
- Utilize best practices from other brands (even from different fields), which can easily encourage consumers to write and publish their reviews on social media or on websites.

For example, Salomon created a hashtag for consumers to use when posting their products and how they use them on social media.

Thanks to this hashtag, the Salomon’s team can find these posts and use the best photos/posts on the official website as a review or as an example of how their product can be used. Nike also uses the same methodology.
KEY LEARNINGS & RECOMMENDATIONS

01 CLEAR NAVIGATION

Consumer’s time is precious. They don’t want to spend a lot of time on an application or website if they don’t have to. Consumers need to have the chance to make an order quickly. For this reason, a client-friendly website with a clear structure and simple navigation would be the most ideal for brands to look at.

02 CONVENIENCE

Click & Collect services should first and foremost have a convenience function for consumers. Buying online instead of going to a brick and mortar shop meets consumer needs of instant gratification and self-indulgence.

03 ATTRACTIVE WEBSITE

Create a website with high quality and visually appealing pictures. This allows consumers to clearly envision the product.
KEY LEARNINGS & RECOMMENDATIONS

→ AFTER PURCHASE

01 DELIVERY

Delivery is everything after the purchase. What can be done in these situations? Some brands use the following strategy: if orders are mixed up, or something went wrong, they provide free drinks. People like small gestures like this from brands. If any products were changed during order processing, consumers should be aware of this. And they should have a choice of which products to choose as replacements.

One great example of this was with Whole Foods where they give consumers the option to select a “no replacement” option.

Patrick Byringer
@supermarket

I’m really flexible and I usually don’t care about substitutions on grocery delivery but this woman didn’t say anything! I got a ½ gallon of 2% milk instead of half & half, and expired Hawaiian flavored bagels instead of plain. The app doesn’t say anything was switched!

Kim McRae
@MamaMcRae

@BeckyQuick My experience with Whole Foods delivery via Amazon is awesome. Prices have come down a lot and if you don’t want a weird replacement, you can just select no replacement. I love it!
Who are our CONSUMERS?

Here, we identify the key tribes of consumers that are driving conversations around Ecommerce in the FMCG industry. We dive deep into these groups' unmet needs and explore what ties them together as consumers.
FUNCTIONAL NEEDS OF THESE TRIBES

1. They appreciate convenience and being straightforward – they are too lazy to go to shops and like being able to save time by shopping whenever they want
2. They are afraid of COVID so prefer to stay at home
3. They enjoy easy to do weekly meal planning, especially with meal kits
4. They enjoy tasty and fresh products
5. They appreciate fast delivery, an easy customer-friendly website, and the opportunity to buy everything on one site
6. They like varied menus that don’t get boring.

EMOTIONAL NEEDS OF THESE TRIBES

1. Ecommerce can be the easiest way to get in a good mood
2. Online deliveries create a personal touch by having special deliveries and decorations for birthdays and other holidays
3. Like easy ways to treat themselves to even with everything closed
4. Shopping for items like cosmetics and clothes can be a relaxing process, and brings these consumers positive emotions
5. Delivery can bring some esthetic mood for this group
6. This group wants to feel that brands take care of them during the entire customer journey
7. These consumers want to feel a personal touch.
ACTIVE PARENTS

Try to combine parenting with an active position in life (career, self-realisation, hobbies). These parents show clear priorities in their daily feeding life - delegating daily routines to save time as top priorities. They prefer meal kits such as Hello Fresh and Blue Apron instead of grocery delivery.

KEY NEEDS
- Ideas and meal planning
- To be healthy and therefore more energy
- To delegate
- To have more time on self-realisation
- To spend more time with their family
- To have more time for their hobbies
- Be more emotionally attached to the family
- Save time for rest and quality rest
This tribe is made up of the younger generation and people who love technology. They often have time to go to the shop to do grocery shopping but to them this activity is “old school”. They use Ecommerce very often because it is accessible and it gives them more time for themselves, their hobbies, their friends.

**KEY NEED**

Less routine and home duties to have more time for generating new ideas and enjoying life.
NEW MOMS

This tribe is in a role they are not used to – being a parent. At a certain point there are too many responsibilities for this group. During the pandemic, these new moms begin to use grocery delivery and meal kits on an ongoing basis.

KEY NEEDS

- Not spending lots of time on cooking:
  - To be more with their families
  - To spend more time on themselves (beauty, rest, sport, physical and mental recovery)

- Balanced meal planning:
  - To be healthy, active, physically in-shape
  - To be a role-model for their children.

- To have help, support and understanding with the transitioning body and spirit change

- Save this time for rest, hobbies, quality rest

- To feel as they are a part of communities with the same issues/duties/dreams/needs

They prefer meal kits such as Hello Fresh and Blue Apron instead of grocery delivery.
When Ecommerce was not as popular, people went to the nearest shop because it was convenient. Consumers in this group now have the opportunity to order from a site that has the same values and culture as they do. This tribe loves to support and buy local and eco-friendly brands with a powerful CSR strategy.

**KEY NEEDS**

- To have more options to choose
- To have wider delivery area
- To have similar products on major websites such as Amazon
- To have an increase the popularity of small, local, eco brands and marketplaces
- To feel as if they are a part of communities with the same interests
These people seek or currently follow a healthy lifestyle. Online grocery and meal kits have the benefit of being easier to control what this group wants to buy. For this group, there are often limited to no shops with healthy options. Thanks to online grocery and meal kits, these consumers can easily order healthy food.

**KEY NEEDS**

- To swap junk and unhealthy food for balanced meals
- Easy meal planning;
- To be proud of having a healthy lifestyle
- Composition
- To have more healthy options
- To be healthy and to stick with new habits
COOKING LOVERS

This group enjoys cooking and exploring creative outlets. They like to spend time together with family to cook with creativity, fun and with different experiences.

KEY NEEDS

- Meal ideas and planning
- Step-by-step instruction and getting the right types and proportions of ingredients
- To avoid grocery shopping
- To enjoy the cooking process and great tastes without spending too much time on preparation
- To learn how to cook new dishes
- To have fun during the cooking process
- To share their lovely-hobby time of cooking with their friends, partner and/or children
This group has been experiencing a wide range of fears when it comes to COVID. They are afraid of shopping in-store and don’t want to interact with the general public, which means they rarely leave their homes or see friends/family.

**KEY NEEDS**

- Special services that provide online grocery shopping
- Easy to use, easy to navigate websites
- Widely available information about these websites to ensure they are reliable
- Promotions and affordable pricing
- Zero-contact delivery methods
- Ability to shop local
SOCIALLY RESPONSIBLE CONSUMERS

This group follows all safety measures to help them avoid getting infected with the virus and stop the viruses from infecting.

KEY NEEDS

- Delivery right to the door
- Delivery without any physical contact

The risk of the virus is still high. People are afraid to go to grocery stores because many people don’t respect public places’ rules. This is a perfect time to increase Ecommerce values and show this group of consumers why they should do it.
RECOMMENDATIONS

To help formulate a successful marketing strategy, choose the most interesting tribes and match your messaging and promotions to their unique needs.
NEW & EARLY TRENDS
→ SPECIAL SERVICES AND MARKETPLACES
FOR DIFFERENT GROUPS OF PEOPLE

01

SENIORS AND THE IMMUNOCOMPROMISED
(ESPECIALLY IN THE US, WHERE THE CLOSEST SHOP CAN BE FAR AWAY)

Seniors sometimes find it difficult to understand modern technology. For them, it is not so easy to switch between a wide range of different websites. This group often does not have someone to help them with this. That is why the creation of a community or a special marketplace that satisfies the needs of this audience is so important.

Grace Lee 陳嘉樺
@graceleeandco

A small team of young New Yorkers has come together to create a free grocery and supply delivery service for seniors and the immunocompromised. If you are in need, or can afford to give your time or money toward those who are, visit invisiblehandsanddriver.com
NEW & EARLY TRENDS

→ SPECIAL SERVICES AND MARKETPLACES
FOR DIFFERENT GROUPS OF PEOPLE

02

ALLERGY-FREE AND GREEN PRODUCTS

There is now a strong consumer demand for eco-friendly, allergy-free, and gluten-free products. There are currently very few communities, websites and marketplaces that offer only these types of products. On top of this, the demand for health among consumers is growing. Party due to the pandemic, many consumers are thinking more about immunity and seeking an overall improvement in their health and quality of life.
NEW & EARLY TRENDS

→ SPECIAL SERVICES AND MARKETPLACES
FOR DIFFERENT GROUPS OF PEOPLE

03

READY TO EAT KIDS LUNCH

“Active parents” like to delegate as many routine things as they can do. However, they often feel guilty for not spending enough time with their children. Because of this, they have a strong desire to express love and care for their children. “Ready to eat kids lunches” is a growing trend that meets the needs of busy parents and the health needs of children.
REPLICATING THE POWER OF OFFLINE COMMERCE

An advantage of “offline commerce” is that people can achieve emotion out of a purchase. Many companies have started to personalize products or delivery methods to provide consumers with the emotion they need and desire.

One example is how meal kits services created special menus for people with specific dietary restrictions like seafood-free.
CONSUMERS DON’T LIKE TO PURCHASE FROM IRRESPONSIBLE COMPANIES.

In today’s sociopolitical climate, brands and websites need to have powerful CSR strategies if they are to compete. Many consumers simply won’t buy from brands or retailers that don’t have values that positively impact environmental sustainability, human rights, and health.
NEW & EARLY TRENDS

→ SUPPORTING LOCAL BUSINESSES
RATHER THAN BIG RETAILERS

THE IMPORTANCE OF SUPPORTING LOCAL BUSINESSES

Consumers like to support local companies and their values. Consumers find that local and small business customer service is much better than larger retailers and overall the they find the experience more meaningful because feel as though they are helping “the underdog.”

@melton (via Instagram)

“As we continue to social distance, I’ve found that I can support small businesses from all over America safely and easily using Amazon with just a few clicks – and I’m excited to announce that one of you will win this box full of products from incredible small brands. To enter, leave a comment with the name of your favourite small business product found on Amazon. Find more on amazon.com/supportsmall.”

@anonymous (via Twitter)

“As much as I can, I will avoid buying at Walmart, Costco and Amazon. I will buy essentials at my local grocery store, and will wait till my local stores open to buy anything non-essential.”
NEW & EARLY TRENDS
→ VISUAL REVIEWS

VISUAL REVIEWS OVER TRADITIONAL REVIEWS

Visual reviews by consumers are becoming more powerful everyday. There is a visible trend of increasing importance surrounding visual reviews through the use of photos and videos. Consumers now need to see the product as visible as possible to make an online purchase. For example, the evolution of the number of video-posts increased by 67% compared to the previous year.
Ecommerce in the Alcohol sector has had visible growth during the pandemic time: evolution is +114% (2019 vs. 2020).

This growth continues to accelerate with an average evolution of +14.6% since September 2020.
Overall, beer and wine brands have led in popularity with cider brands having the most remarkable percentage growth since 2019 (+201%). Cider has seen a significant rise in consumer conversations because the brands have been more locally produced – supporting the fact that many consumers prefer supporting local businesses.
Diageo ranks first in overall Ecommerce post volume due to the number of popular brands in their portfolio. Of the Diageo brands, Guinness is the most visible (23% of the total Diageo volume). Molson Coors’s volume closely follows Diageo with their Magnum (21%) and Coors Light brands (16%).

Another highlight was Brown Forman’s growth rate (+154% vs. 2019). Brown Forman’s growth rate leaps past other brands thanks to their launch of a delivery party box by Popworld.
DEMOGRAPHICS

When discussing alcohol and Ecommerce, the number of men and women is approximately equal. In terms of age, online discussion involved consumers mainly from the ages of 35-54.

EVOLUTION OF AGE CATEGORIES (2019 vs. 2020)

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Change</th>
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<tbody>
<tr>
<td>18-24</td>
<td>-10.6%</td>
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<tr>
<td>25-34</td>
<td>+31.8%</td>
</tr>
<tr>
<td>35-44</td>
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<td>+45.5%</td>
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EVOLUTION OF GENDERS (2019 vs. 2020)

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<th>Change</th>
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</thead>
<tbody>
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<td>+78.8%</td>
</tr>
<tr>
<td>FEMALE</td>
<td>+121%</td>
</tr>
</tbody>
</table>
While grocery related websites are well known, alcohol websites are unknown to most consumers. For example, when consumers online want to order alcohol they often post with terms that include "I'd like...", "I wish I can...". This trend reveals that it is not clear how or from where consumers can order alcohol online.

Alcohol delivery is a relatively new trend and consumers love the possibility of ordering alcohol that is delivered right to their door.
One of the most important highlights in the AlcBev industry is how winery and brewery delivery services boomed as local pubs and restaurants were closed because of lockdowns. As was discovered holistically across all industries, most consumers now prefer to support and buy from local companies as they navigate the uncertain times of the pandemic. Some consumers turn to local breweries because they live outside of the delivery zone from online retailers or they had negative experiences with long-distance delivery services. Additionally, consumers appreciate how local breweries occasionally team up with fellow local businesses - restaurants, bakeries, etc – to deliver products other than alcohol to show solidarity.

The evolution of the “value of the present moment and self-indulgent” is growing: the evolution is +103% (2019 vs. 2020).
CONSUMER PURCHASE JOURNEY

*FMCG sector similarity*

Comparably speaking, the AlcBev industry’s SOV is very similar to FMCG. In this section we will note what stands out most for the AlcBev industry.

**Alcohol SOV at different phases**

**BEFORE PURCHASE (4.3%)**
- Price
- Lack of knowledge of alcohol delivery and websites

**DURING PURCHASE (94.1%)**
- Delivery
- Alcohol variety (+niche brands)
- Website product description
- Possibility to have professional advice to choose alcohol

**AFTER PURCHASE (1.6%)**
- Client service: easy refund process and solving problems
- ID check in
- Reliable (bubble wrap) and “special for gift” packaging
CONSUMER PURCHASE JOURNEY

→ BEFORE PURCHASE

01

UNCERTAINTY

While most AICBev consumers recognize and actively use alcohol delivery services, some don’t even know where or how to purchase alcohol online.

Also, in general there is a lot of consumer uncertainty when it comes to the various alcohol laws that impact delivery services.

CUSTOMER-FRIENDLY WEBSITES

When shopping for alcohol online, consumers demand for an easy-to-navigate website and seamless delivery process. Consumers appreciate online shops that hold a large selection of brands and alcohol types – especially smaller niche brands.

Since online alcohol shopping is relatively new, consumers also appreciate any helpful advice and hassle-free service given by sales online.

Finally, consumers find it inconvenient when online alcohol services set a high minimum amount for free-shipping.

→ DURING PURCHASE
CONSUMER PURCHASE JOURNEY

→ AFTER PURCHASE

01 CUSTOMER SERVICE

Many consumers get frustrated when having to deal with getting a refund after an order is cancelled. Even worse, AlcBev Ecommerce service is often absent to solve issues and is criticized for usually shifting responsibility to local vendors.

Similar to how alcohol is currently purchased, people feel awkward for being asked to show their ID when they are clearly old enough to buy alcohol. On the flip side, they also show their concern when the driver does not check their ID.

Consumers appreciate when their alcohol arrives in packaging. Since alcohol bottles are often fragile, consumers prefer sellers to have careful packaging to ensure that bottles do not break during delivery, which is especially important for high-end alcohol. Additionally, consumers actively look for gift packaging services as bottles are often bought as a present.
CONSUMER PURCHASE JOURNEY

→ RECOMMENDATIONS

BEFORE
Raise consumer awareness about the rules and process for buying alcohol online, as well as about websites and online services where it is possible to order alcohol.

DURING
Explore team consultants to help boost sales for niche and local brands. These consultants could provide on-demand advice and help with selection. If this is not possible, retailers could make a video from the founders of a local brand, talk about this alcohol, give advice, and describe the taste.

AFTER
As bottles are fragile, it’s necessary to pay more attention to secure packaging.

Overall, Ecommerce trends in the AlcBev industry are very similar to what we see in the FMCG industry. Throughout this section, we make reference to these similarities by including the Link icon and a page reference so that you can easily identify these similarities.
Who are our consumers?

The AlcBev industry has some of the same tribes as the FMCG industry, for example:

- Technology and innovation lovers
- Green and local amateurs
- Socially responsible consumers

Tribes that are specific to the AlcBev industry are listed here.

© FMCG sector similarity on page 34
HEDONISTIC PLEASURE LOVERS

As active people who combine an interesting job with various hobbies, these pleasure lovers have an appreciation for #wine, #selflove, and #wellness. They like online delivery for its speed and convenience, and they are willing to spend a little more for comfort and great service.

KEY NEEDS
- Comfort and rest
- Pleasure
- Escape from daily duties and decision-making
- Feel the moments
- Be present and okay doing “nothing”
- Ability to buy online

#onlineshopping #shopsmall #stayhome
#cheers #supportsmallbusiness
#food #gin #happyhour #love
#beer #delivery #wine
#onlineshopping #shopsmall #stayhome
#craftbeer #shoplocal
#cheers #supportsmallbusiness
#cocktails #drinklocal #supportsmallbusiness
True gourmands! This group can be quite selective in their choices; often resonating with brands that offer great customer service or a fascinating brand that aligns with their values. They appreciate quality, beauty, and aesthetics in every aspect of life and will not hesitate to share a good find with their social circles.

**KEY NEEDS**

- Services that offer a personalized approach to every client
- Personal advice and assistance with choices
- Delivery that brings positive emotion and excitement (e.g., aesthetically pleasing packaging w/ small gift inside)
- Elegant atmosphere
- Belonging to wine-loving communities where they discuss and share latest finds
- Beautiful brand histories that come with exquisite tastes

**TOP HASHTAGS**

- #foodie
- #gin
- #onlineshopping
- #whiskey
- #shoplocal
- #shopsmall
- #winelover
- #curbsidepickup
- #drinklocal
- #craftbeer
- #delivery
- #foodie
- #gin
- #onlineshopping
- #whiskey
- #beer
- #cocktails
- #wine
- #shoplocal
- #shopsmall
- #winelover
- #supportlocal
- #winetasting
- #supportsmallbusiness

**TOP EMOJIS**

A LINKfluence SOCIAL INTELLIGENCE REPORT | 64
OUTDOOR ENTHUSIASTS

This group loves spending time with friends, going outdoors, and doing other activities. They like light alcoholic beverages or even without alcohol.

KEY NEEDS

- The ability to order such light or non-alcohol beverages drinks
- A large delivery area, as the mood to throw a small party can arise at any time when they are out in nature
- Delivery should be in handy boxes so that it is easy to transport and take with into the countryside.
This tribe likes to order alcohol online because it is a great possibility to change the mood quickly and to create a celebration, even if it wasn’t planned. They are not so picky about sophisticated taste or beautiful packaging. Their main aim is to be able to throw a party quickly and affordably.

**KEY NEEDS**
- Simple, fast, understandable alcohol delivery
- Inexpensive prices and minimal service / delivery charges

#supportlocal   #supportsmallbusiness
#etsy   #winelover   #drinklocal
#cocktails   #curbsidepickup   #gin
#party   #fun   #craftbeer
#beer   #delivery   #wine
#food   shoplocal
RECOMMENDATIONS

To help formulate a successful marketing strategy, choose the most interesting tribes and match your messaging and promotions to their unique needs.
Many early and emerging trends in Ecommerce for the AlcBev industry find their roots in the FMCG industry as well. Using what we know from the FMCG as base, we uncover the specific trends driving AlcBev including insightful and popular trends like DIY cocktail kits, souvenir bottle trading, and even virtual wine tasting.

NEW & EARLY TRENDS
→ DELIVERY OF PREMIUM ORGANIC BIODYNAMIC, VEGAN AND CRAFTED ALCOHOL IS GROWING

ORGANIC, VEGAN, AND SPECIALITY CRAFTED DELIVERIES

Similar to trends we see in FMCG, there is a strong consumer demand for eco-friendly, organic biodynamic, vegan and specialty crafted alcoholic beverages. Deliveries for products like these seem to be lacking for many consumers. Because of this, when there is a site or service that provides these types of products, consumers are generally very surprised, supportive, and happy.
Creating Offline Experiences Online

Many breweries and wineries organized virtual tasting events during the pandemic to engage and interact with consumers. Consumers liked the initiative. Potential opportunities include:

- Local brands can host events to attract new customers, increase brand ranking, and introduce new products
- Retailers can organize virtual tastings and can be transformed to live streaming Ecommerce
NEW & EARLY TRENDS
→ DIY COCKTAIL KITS GO VIRAL

DIY KITS
Brands and bars launch DIY cocktail kits for people who still want to enjoy a cocktail when staying at home to cheer up and to have homemade fun. Because of this, many DIY subscription cocktail boxes are emerging.
NEW & EARLY TRENDS

→ BUYING / SELLING

SOUVENIR BOTTLES AS “RETRO COLLECTION”

TAPPING INTO RETRO COLLECTIONS

Currently there is no platform for this (or if there is, consumers don’t know about it). That is why new platforms can be created or to have a special place on Amazon for such products.

→ TUTORIAL VIDEOS

HELPFUL TUTORIALS

Short tutorials educating consumers how to make cocktails from purchased goods is a great way to jump on this trend. Or, a “How to” tutorial on wine degustation at home, encouraging consumers to create their own mini bar.
Unlike FMCG, online vehicle shopping is still nascent. Though brands and dealerships initiated digital transformation programs years ago, they use digital advertising and marketing practices primarily to drive offline sales, and transactions occur only partially online (in the case of appointment booking, for example). While online shopping initiatives like GM’s “Shop-Click-Drive” and Hyundai’s “Click-to-Buy” have achieved some success, most people still prefer to buy offline.
OVERVIEW

While mentions about online automobile shopping increased by 62% vs. 2019, adoption of Ecommerce in the automotive industry has been slower than in FMCG or AlcBev.

In terms of volume, Ford comes in the first place thanks to a large number of Ford dealerships communicating their 100% online shopping service is available during the crisis. Honda is the second most visible brand for a similar reason. However, Subaru enjoyed the greatest growth of 112% but this increase was mainly driven by consumers exchanging information on forums about buying Subaru car parts online. Both Volkswagen and Buick witnessed a significant growth as their dealerships became more active in promoting their online shopping service since the pandemic. Buick’s shop-click-drive service online buying program was usually highlighted by dealerships when promoting.
DEMOGRAPHICS

People discussing automobile Ecommerce are slightly older and skew towards male (64% of posts). However, the number of women participating in these discussions is growing faster than the number of men, especially between the ages of 35-44, and above 65.

EVOLUTION OF AGE CATEGORIES (2019 vs. 2020)

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
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<td>25-34</td>
<td>+2%</td>
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EVOLUTION BY GENDER (2019 vs. 2020)

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<th>Increase</th>
</tr>
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<td>+57.8%</td>
</tr>
<tr>
<td>Female</td>
<td>+78%</td>
</tr>
</tbody>
</table>
WHICH AUTOMOTIVE ECOMMERCE WEBSITES ARE LEADING?

Unlike in the FMCG and AlcBev industries, consumers prefer to share car shopping experiences on auto-specific review sites, rather than on general social media.

Online shopping services are most favored for buying new cars, but the number of people using online used car dealerships is increasing.
CONSUMER TRENDS

COVID has accelerated the adoption of online automobile shopping: many brands now provide end-to-end online shopping, including contactless delivery (most notably Tesla and Carvana).

Many people are excited to see this transformation and are delighted that they can buy a car without leaving their home. Although many perceive this as a “risk”, it is one they are willing to try.

Buying online has also become more popular due to an increase in price consciousness in many vehicle segments. Simultaneously, public transportation is perceived as riskier due to a preference for social distance.

There was a peak in conversation about online car shopping in July 2020, driven mostly by used-car campaigns from dealerships.
CONSUMER PURCHASE JOURNEY

FMCG sector similarity

This section examines the challenges and opportunities brands and dealerships face when supporting consumers through their online shopping journey, before, during and after purchase, and resulting in the creation of advocates or detractors after the process.

Automobile SOV at different phases

BEFORE PURCHASE (23.7%)

→ Awareness
→ Lack of information and education about availability and process
→ Lack of consumer reviews about online shopping experience
→ Lack of trust in the online process due to non-tactile experience
→ Pricing (or easy comparability of pricing)

DURING PURCHASE (66%)

→ Easy of website navigation
→ Seamless financing and payment system
→ Lack of website accuracy (cars are sometimes not available)
→ Virtual vehicle scams
→ Delivery and ever-changing delivery date
→ Lack of transparency about order status, delivery process and condition of vehicle
→ Vehicle is not in represented condition upon delivery
→ Poor customer care when problems arise during purchase

AFTER PURCHASE (10.3%)

→ Poor after-sales service
→ Long wait time for registration after the car is delivered
CONSUMER PURCHASE JOURNEY

→ BEFORE PURCHASE

While people are accustomed to researching via online video, social media, forums and websites before they visit a dealership, few have tested online shopping.

01 AWARENESS

Consumers often don’t know which brands or dealerships offer online shopping. Except for the most well-known online dealerships or brands like Carvana, Vroom, or Tesla, they have little idea which other brands offer online shopping. During the pandemic, people lack knowledge about where and how to shop.

They also lack education about how to shop online and often assume that buying online is difficult, especially for those who are not familiar with online shopping in general. Even worse, inconsistent regulations between US states make consumers more confused.

02 CONSIDERATION

For all the previous reasons, in addition to the cost of the purchase, consumers take the automobile buying process more seriously relative to other products. Many consumers believe it’s necessary to feel, see, and touch before making a decision. Photographs and videos are insufficient.

Most people need to test drive before buying. But even when test driving is available, people have been faced with long waiting times, or find that when they book they’re outside of available test drive areas.

Even if consumers have decided that it’s feasible to purchase online, there are few discussions about the actual online ordering and payment process. One driving of online purchase is when consumers find a good trade-in value for their car and or a superior price for what they’re searching for. A minority of people consider cars overpriced when buying online.
CONSUMER PURCHASE JOURNEY

→ DURING PURCHASE

People who experience online automobile shopping appreciate its ease, speed, and lack of hassle. “During purchase” is the most discussed phase of the journey and their experience during this phase determines their attitude and detraction or advocacy for buying a car online.

04

PAYMENT SYSTEMS

People discuss the importance of easy-to-navigate websites and fast and error-free payment systems. Some also point out that the financing and trade-in process is separate.

@anonymous (via Carvana Reviews)

Pros: The concept is great...shop online for a car, they deliver, no haggling! Photos of my vehicle were accurate. Felt like I got a good price. Cons: Website has some issues. Lots of errors. 30 minutes isn’t long enough to finish the purchase. Too many glitches, doesn’t seem to work well with the Safari browser. Wait time on hold is always 20+ minutes. Always have to select for a call back. That’s a great option! Not clear how the referral program works.

02

CUSTOMER COMPLAINTS

People are disappointed when they find the car they booked or intended to purchase was already sold, despite appearing available on the website.

@anonymous (via cars.com)

The car I researched, reserved, and put on my loan application, was pending for another person to buy it. The worst part is instead of Carvana reaching out and admitting to the other customer it was already reserved, they told me there was nothing they could do. Which is ridiculous because the other person hadn’t even filled out the paperwork or decided yet if they actually wanted the car.
“Painful delivery experience” is the topic most discussed by netizens (4.67k, 34.1% +238%), primarily due to a lack on-time delivery or frequently changing delivery date. Exacerbating this is poor communication from sellers about the changing dates or reasons for the change, and difficulty contacting customer service to get more information about a vehicle they’ve paid for but which never arrived. Consumers complain about not knowing where their car is or when it will be delivered or having to wait longer than others who ordered at the same time.

Another often discussed topic is the arrival of vehicles that are not in represented condition: sometimes cars arrive with obvious imperfections, for example, missing parts, one key only, with leaks, or otherwise different from online photos, and consumers talk about the ability of sellers to intentionally misrepresent the condition of vehicles.
CONSUMER PURCHASE JOURNEY

→ AFTER PURCHASE

While most advocacy comes from a completely smooth transaction that has avoided the common discomfort of the traditional offline buying process, this positive experience is not-infrequently damaged by their after-sales experience.

01 SLOW REGISTRATION
Registration often takes too long. People complain about not receiving their registration and plate until after their temporary tag has expired (a common situation especially during the COVID pandemic), and about receiving wrong or inconsistent information.

@anonymous (via highya.com)
"Finally got plates and registration today, just 92 days after purchasing the car from these mokes."

02 POOR SERVICE
After-sales service is sometimes perceived as inferior for cars bought online. Many complain about difficulty in reaching customer service, and it often takes too long to receive a refund or a replacement car.

@anonymous (via highya.com)
"However, it turned out to have hidden rust, so I returned it within the 7 days and received a full refund. HOWEVER, from the moment my order was confirmed via email, until the day our dealings were done when the refund hit my bank account, I never received another email or text or call advising me of the status of my pickup, my subsequent return, or refund. I never knew where I stood with them. Chatting and calling got me long wait times and vague general answers not specific to my transaction. When I returned the car, I actually had to ask for a copy of the return agreement!"
KEY LEARNINGS & RECOMMENDATIONS

→ BEFORE PURCHASE

Most consumers still don’t understand how buying a vehicle online works. Brands and dealerships should consider investing more in educating consumers about online car shopping.

01 EASE OF USE

People need to be educated about who sells cars online and ease of the buying process. They should know that buying a car online is not more difficult than buying other goods online and that everything can be done online, including finance, trade-in, and delivery.

02 FACILITATE REVIEWS

Brands and dealers should do more to facilitate more online reviews. Or brands can consider inviting people to share reviews. Creating dedicated spaces for this in brad’s forums or communities might also help consumers.

03 CUSTOMER EDUCATION

Specifically, brands should consider informing consumers that buying online doesn’t mean that everything happens online. People need to understand that they can still test drive, and that this can be more practical and enjoyable than going to a dealership.
KEY LEARNINGS & RECOMMENDATIONS

→ DURING PURCHASE

Despite promises of hassle-free service, people are still looking for more communication and accuracy during the purchase process. Brands should consider improving the functionality of their digital tools and adding human support to the process, especially during purchase.

01 STATUS UPDATES

People would like to be consistently and accurately updated about the status of their car during the entire process, especially important phases like purchase confirmation, delivery date, and delivery rescheduling.

02 HUMAN CUSTOMER CARE

Consumers expect a more thorough and prompt consumer care, especially relative to the higher level of service provided for other online businesses. People generally prefer human service to a chat-bot, especially given the novelty of buying a car online and the importance of the purchase.

03 TRANSPARENCY

People expect more accuracy about the condition of the vehicle. Whereas in other industries people will simply return a defective product, when buying vehicles, many believe it is a fraudulent practice to deliver a vehicle that is damaged or inconsistent with their expectations.

@anonymous (via dealerrater.com)

"Do not buy a car from them! I spent almost $40,000 on a used Porsche Boxster. I had it for less than two months, and the driver’s door jam separated from the panel. This is all under their 100-day warranty. I took it to Porsche, and it ended up needing a new door panel, and would cost $3,500 to repair. They called in the repair (to try to get it covered), and of course Carvana said that this is cosmetic, and was not covered."
Online sales is faced with the same after-sales challenges as traditional sales, but it is framed in the context of superior customer care provided by other industries that have digitized years earlier.

**AFTER-SALES SERVICE**

People require a more responsive and faster after-sales service, especially when asking for a return or exchange.

**FOLLOW UPS**

For ownership aspects specific to buying a vehicle (such as registration), consumers require more proactive follow-up and a release from the anxiety that important and potentially costly steps will be left to them since the sale is complete.
Who are our CONSUMERS?

While tribes from the automotive industry overlap with some from other industries, such as FMCG and AlcBev, automotive tribes are more specific and are detailed here.

FMCG and AlcBev sector similarities on pages 34 and 62.
THE DIGITAL ADOPTER

Generally composed of younger shoppers or those active in the digital economy, and many who have this group buys everything possible online and enjoys the convenience that technology bring to their lives.

KEY NEEDS

- They are innovation lovers willing to embrace and try new experiences.
- In addition to the functional benefits of time-saving and convenience, they have an emotional motivation to be the trendsetters and to share their online car shopping experiences with others.
THE EFFICIENT PRAGMATIST

They are not new buyers and are tired of the dealership experience. They don’t want to waste time haggling with salespeople, and prefer to order and receive their car with ease. They appreciate the transparency and lack of additional dealer fees or hidden costs that come with purchasing a car online. As determined consumers, they know what they want when they begin their car buying journey.

KEY NEEDS

- Comfort during shopping from the first to the last stage
- Hassle-free and time-saving shopping experience
- Buying without a salesperson present
- Transparency during the buying process
- No cumbersome offline paperwork
THE MARGINALIZED SHOPPER

This group usually lacks expertise with cars. They feel intimidated when speaking with salespeople and prefer to shop online because it removes feelings of pressure. They also often experience discrimination related to their ethnicity or gender.

KEY NEEDS
- To be comfortable making an expensive purchase
- No pressure to make a quick decision they might regret later on
- Accurate and reliable information they can trust
- To not feel vulnerable or discriminated against
TESLA COMMUNITY

These consumers are huge fans of Elon Musk, technological advancement, and #innovation. They are typically businessmen or entrepreneurs who drive a Tesla or dream of owning one in the future. As Tesla supporters, they stand ready to support most of the company’s initiatives. For them, Tesla’s service, ease of ordering, and advanced digital technologies are triumphant to any other automotive brand.

KEY NEEDS

- To drive a high-end car and look good doing it
- To support advanced technologies
- To express their values and worldview
- To optimize their time
- To spend their free time on work, hobbies, and family

TOP HASHTAGS

#teslamodel3 #cars #electriccar #spacex #stayhome #subaruforester #tesla #teslamodel3 #subarulucy #subaru #teslaforester #car #elonmusk #ev #teslamodel #teslamodels #teslamodel #teslaroadster
RECOMMENDATIONS

To help formulate a successful marketing strategy, choose the most interesting tribes and match your messaging and promotions to their unique needs.
NEW & EARLY TRENDS

Online car shopping is still far from being mature as other industries. Here are some examples of how dealerships and brands could further improve the online car shopping experience.

FOR DEALERSHIPS

- Providing virtual test drive
- Include customized walk-around display videos for on-demand service
- People appreciate the online shopping offered by dealerships as it is time-saving and hassle-free. This trend could further drive a hassle-free and stress-free offline dealership experience in the future.

FOR BRANDS

- Offer exclusive service for online showrooms by provide an easier online shopping experience
- Provide real-time information about the availability of certain models with filtered locations, online comparisons to help consumers get best deal, and flexible financing options
Looking to the future: Ecommerce in a post-pandemic world
Will the new Ecommerce trends catalyzed by the COVID pandemic increase or will consumers revert back to traditional methods of purchasing? This is the key question for brands in a post-pandemic world.

It’s important to note that a large percentage of consumers only used online delivery and Ecommerce outlets because they were afraid of getting infected by the virus. However, most consumers now seem to prefer Ecommerce experiences over less convenient and more traditional offline buying experiences.

For consumer brands, it is an opportune time to improve and raise the value of Ecommerce in their overall strategies. In this section, we highlight and summarize the most important insights gleaned from our report.

Two crucial areas brands should build their strategies on:

1. Tactics to retain and give even more value, benefit, and pleasure to people who already use Ecommerce outlets so they continue to be regular users.
2. And how to show the benefits, to cultivate a culture of online shopping for users who have not yet converted to online shopping.

In the consumer’s purchase journey section of the report, we conducted a customer development analysis to understand what consumers lacked in existing products and services. This analysis gave us a unique view of how brands can improve Ecommerce by knowing what customers care about, what they like, what they don’t like, what they miss, and what they want to change.
Summary of main consumer frustrations, needs & desires in the three sectors

**OBSTACLES**
- Uncertainty
- Bad reviews
- High price
- Poor customer service
- Order mistakes and food stolen and/or missing during delivery
- Rudeness during the delivery process
- Difficulty to cancel delivery
- Small delivery area
- Lack of transparency/communication
- Poor quality photos/descriptions
- Inability to touch, feel and see products (test drive for automobile)
- Inconvenient Click & Collect service

**CONSUMER-CENTRIC**
- Good blogger promotion and visibility on social media
- Good/reliable reviews (including good photos and video reviews)
- Detailed and full description
- CSR strategy
- The possibility to support local business
- Personalized product/delivery/services
- The possibility to be part of community

**PLATFORM-CENTRIC**
- Easy to navigate website
- All necessary products/compatible ingredients presented
- Unique limited-edition offers and brand activations
- Wide variety of biodynamic/organic/vegan/vegetarian/etc options
- Time-saving and hassle-free experience (automobile)

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# TRIBES & THEIR MAIN EMOTIONAL NEEDS

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<th>Tribe</th>
<th>Treat Yourself &amp; Boost the Mood</th>
<th>To Be More with Their Families</th>
<th>More Time for Self-Care &amp; Hobbies</th>
<th>To Have Support, Help &amp; Understanding</th>
<th>Just Don't Like the Routine Duties</th>
<th>Find a Way to Express Their Values</th>
<th>To Feel Cool &amp; Modern</th>
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Looking to the Future: Ecommerce in a Post-Pandemic World

New and Emerging Trends in Ecommerce A Linkfluence Social Intelligence Report | 95
SUMMARIZING EARLY & NEW TRENDS

FOR CONSUMERS

• Personalised products/websites/marketplaces, which align with their individual needs
• To be and take part in initiatives consistent with their values (CSR strategy)
• To support local and new businesses, interesting and unusual marketplaces instead of big corporations and websites, private/niches products (just for FMCG and Alcohol)
• More visual and detailed reviews
• To be healthier: organic, vegan, craft products (just for FMCG and Alcohol)
• Be eco-friendly (fewer wastes, less plastic, etc)
• To be a part of a community
• To have a better (ie. hassle-free and time-saving) shopping experience (Automobilia)

FOR BRANDS

• To create new ideas on how to attract consumers:
  – a marketing strategy that motivates people to organize a mini-bar at home
  – DIY cocktails where all ingredients are already portioned
  – put some tutorials and some notes with life hacks related to how this product can be used
• To create special marketplaces on interests (eg. where people can buy souvenir bottles)
• To create communities where people with the same interested, can communicate, share knowledge, discuss problems, new discoveries (eg. virtual wine tasting)
• To borrow the D2C model (FMCG and AlcBev, meal kits, delivery by local farms/brewery)

The trending meal kits and local food grocery delivered directly to consumers shows the potential of the D2C business model. Brands could consider opening their own online shop itself or collaborating with Ecommerce platforms such as Amazon.
A LINKFLUENCE SOCIAL INTELLIGENCE REPORT

Want to learn more?
To learn more about using social data for consumer insight, digital transformation and staying close to the voice of the consumer, reach us at insights@linkfluence.com