

Mapping Emerging Customer Trends

2019



The New
Topography of Retail





The research cited in this paper was conducted in 2018 with close to **15,000 consumers** across **5 regions** around the globe including North America, LATAM, Europe, Middle East, India & APAC. Independent research and creative consultancy, Morar HPI, conducted this survey to understand consumer expectations and attitude when it comes to retail shopping.

The retail landscape is hard to navigate with the varying levels of trend adoption. With technological innovations forging ahead, consumer perceptions and expectations are shifting and varying across the globe. For instance, technology following consumers online has resulted in perceived encroachment to privacy which landed in significant measures such as GDPR (General Data Protection Regulation) legislation. Around the world, **86 percent of global consumers state they would ask brands to remove their personal data if a similar regulation was implemented in their region.**



While this happened, consumers are also expecting retailers to identify them as valued customers and offer them personalized offers. Consumers expect retailers to know their full history of purchase both online and offline to process seamless returns.

Futuristic technology innovations have given consumers a plethora of choices. Retail, in recent years, has seen facial recognition technology, drone deliveries and what not. It was found that high-growth markets such as Brazil, Chile, China, India, and the Middle East are more open to these compared with more mature markets (such as Europe and North America), which at present seems to be more set in their ways.

During the study, consumers were segmented based on their buying behavior and how they navigate through each journey.



The Nomad

The Nomad is a nimble shopper but expects retailers to keep-up, having full knowledge of his/her shopping journey from purchase to returns



The Dealer

What motivates this shopper is the hunt, the thrill of the chase. And what's the prize? The best offer, the lowest price, the biggest bargain



The Player

This avant-garde shopper is looking for the perfect mix of brand, product, and experience. The Player seeks out great shopping experiences, incorporating cutting-edge technology across every touchpoint

The report exposes the areas these three personas significantly influence.

1. Privacy & Anonymity

Introduction of GDPR legislation has heightened the concern over the collection of data and use of personal information.

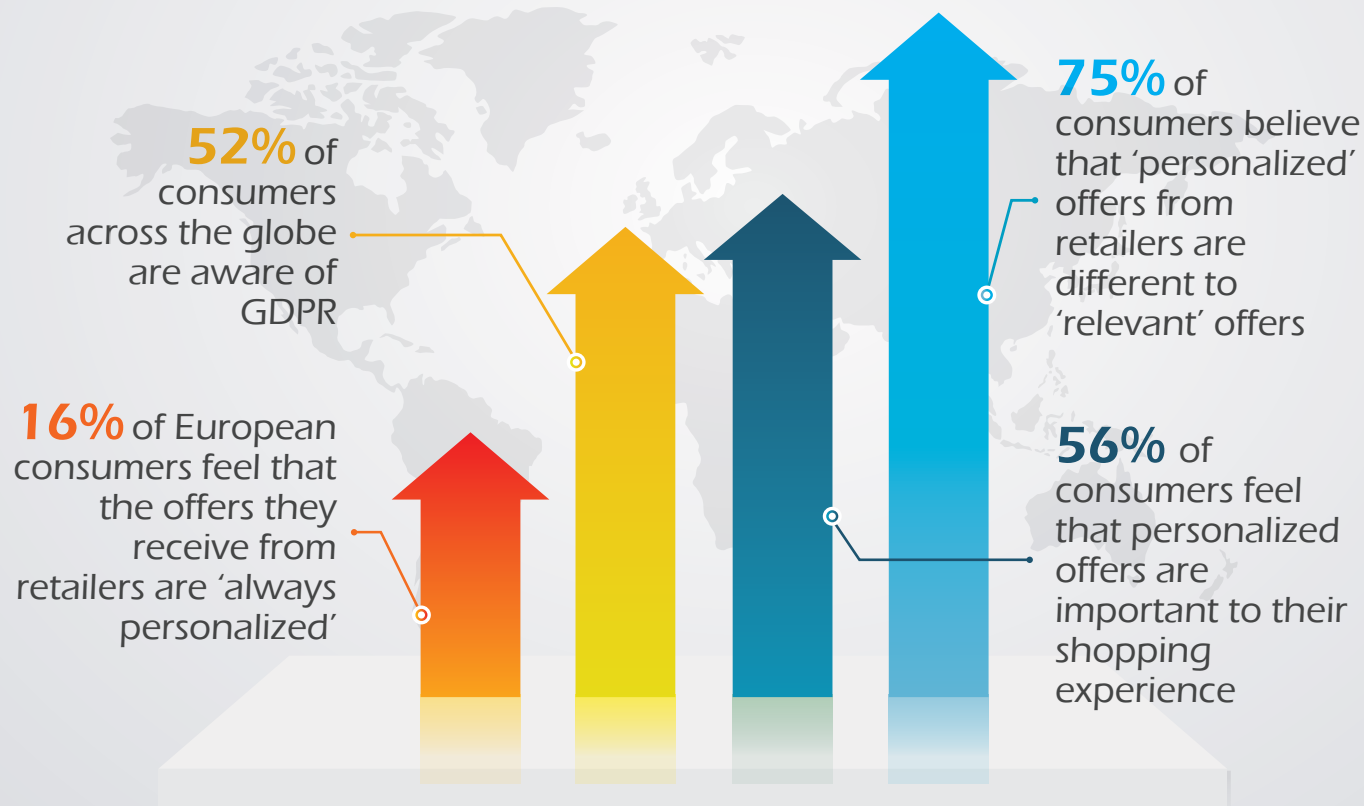
It was found that **72 percent of European consumers are aware of GDPR compared to only 25 percent of North American consumers.** What is surprising is the level of sensitivity outside of Europe and the desire to exercise the right to be forgotten. 87 percent of consumers in North America mentioned that they would request that brands remove their personal information if given the option, and 45 percent would do this for all brands they interact with, compared to 34% of Europeans. In LATAM, **90 percent of consumers would exercise the right to select which retailers have access to their personal information,** and in the Middle East, India and APAC this response is **91 percent.**



Globally, **75 percent of consumers believe there is a distinction between 'personalized' offers and 'relevant' offers,** and only one in five consumers feel offers from retailers are always personalized to them. This perception that communication isn't always relevant and personalized means retailers must work to understand their consumer preferences better and without invasion of their privacy.



Only 16 percent of European shoppers feel that the offers they get from retailers are either “always relevant” or “always personalized”, compared to about 20 percent globally. But it’s clearly important, with **56 percent of consumers in Europe stating that personalized offers and promotions are important to their overall shopping experience.**



This means that retailers still have the opportunity to improve personalized shopping experience using discreet, intelligent methods. Consumers who exhibit similar patterns to the “Dealer” – seeking out the best offer, lowest price & the biggest bargain – are ripe for conversion in this new environment of anonymity.

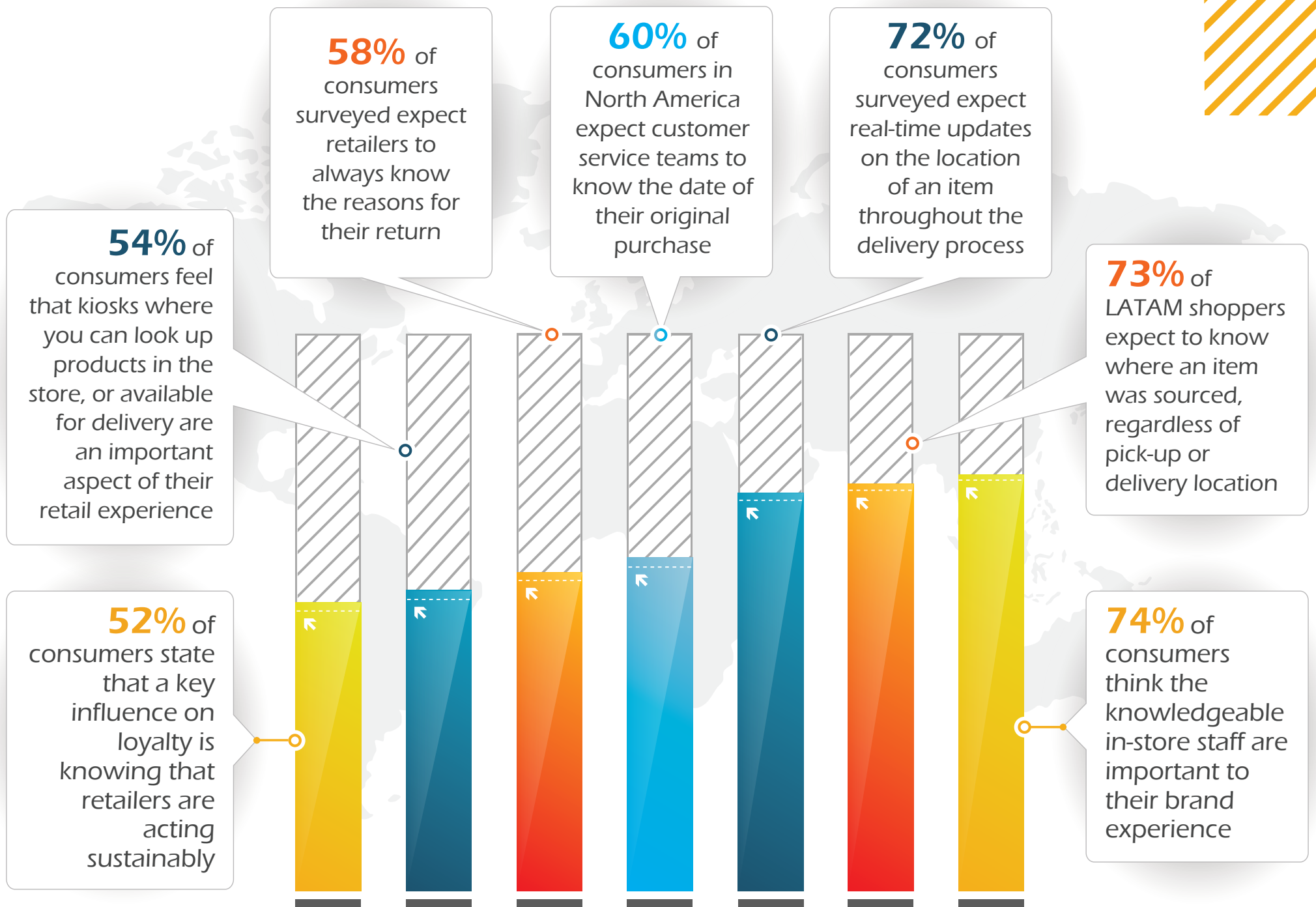
2 Insatiable Appetite for Information

Modern consumers need clear visibility into everything. They have the urge to know every detail from production to delivery while tracking a product. And if they decide to return the product they don't want to explain the order and purchase details but expect all the details to be at the retailer's fingertips. And they will become impatient, if not.

Almost half of the consumers expect to be able to research and order products online and pick it in-store on the same day.



This level of transparency and omnichannel intelligence is important for the “Nomad”. They effortlessly browse and research for the product.



3. Big & Bold Technology

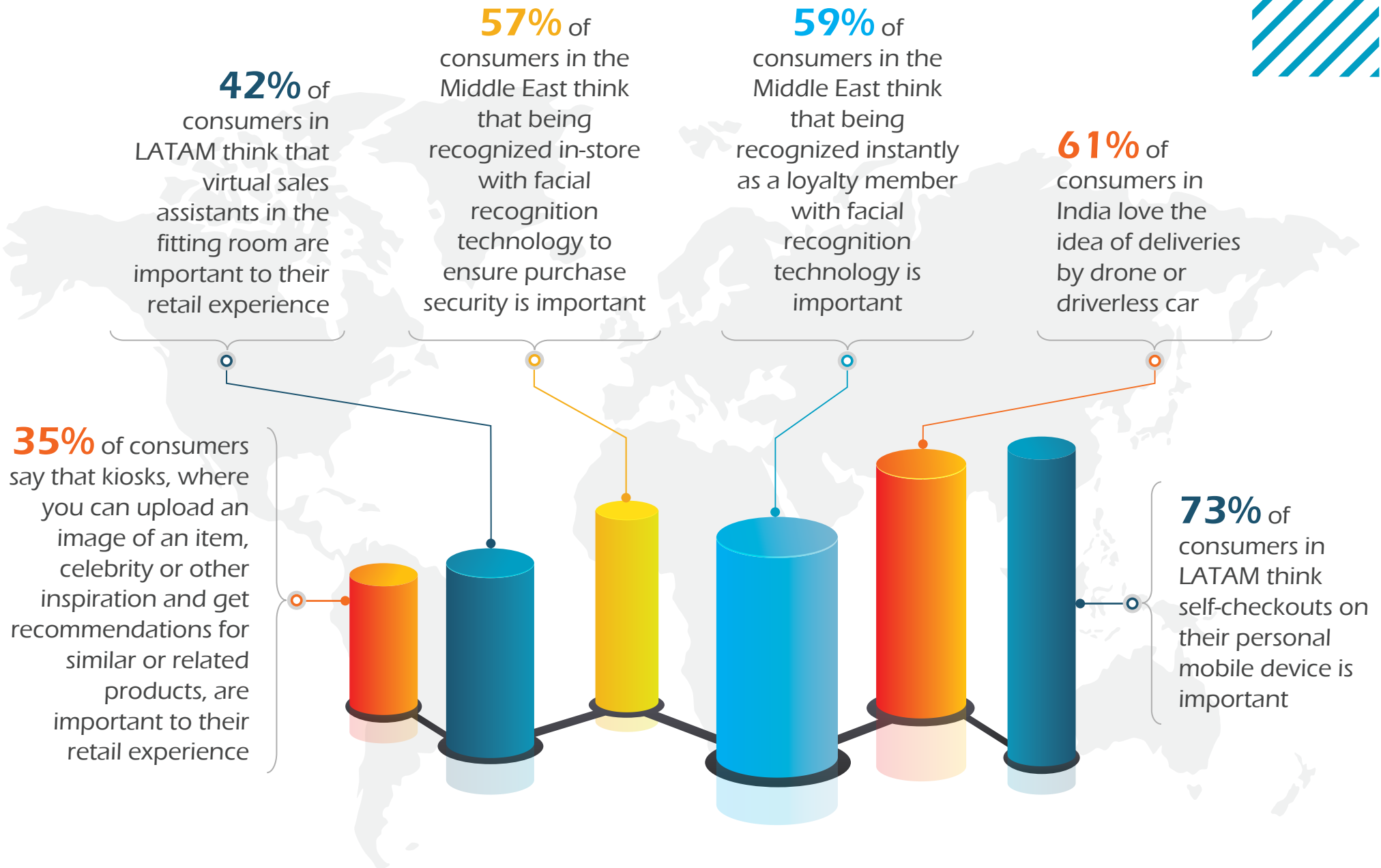
With consumers evolving and adopting new technologies, retailers are forced to make big, bold moves when it comes to implementing technologies. Virtual sales assistants, interactive kiosks, in-store robots, facial recognition technology, driverless cars, drone deliveries – it's all about bigger, better and faster experiences.

Retailers across Brazil, Chile, China, India, and the Middle East will benefit most by incorporating bold new technologies into their retail experiences. **60 percent** of consumers in these regions think it would be “awesome” to have near real-time delivery of online purchases by driverless cars or drones. Likewise, **64 percent of consumers in high-growth markets love the idea of using virtual reality at home to put together looks to try on in-store or have delivered**, while this appeals to a smaller **33 percent** of consumers in Europe, North America, and Australia. Only **28 percent** of the consumers in Europe, Australia, and North America think the latest retail technologies are important.



For the “Player”, it’s all about the how and not what. If retailers are looking to engage this segment of consumers, it’s better to take the risk with technology and provide an overall,





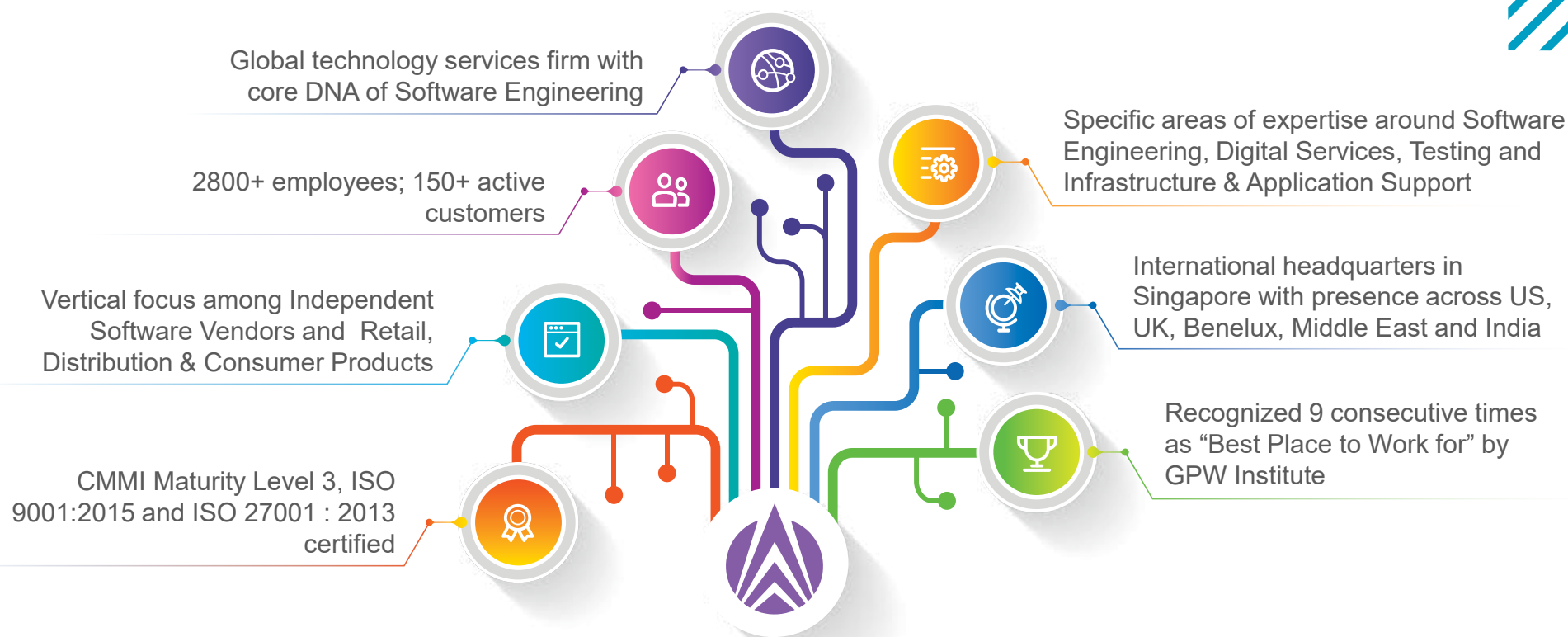
A woman with dark curly hair is wearing a VR headset and holding a large red shopping bag. She is smiling and looking upwards. The background is a blurred indoor setting, possibly a store or a public space. The image is overlaid with a semi-transparent orange banner on the left side containing the title.

A Connected Future

Understanding your customers and their requirements will help retailers offer personalized brand experiences to improve customer loyalty. Providing consumers with product information from production, order tracking and delivery details means being transparent about retailers' operations which improves consumers' trust. Making big, bold investments in technology will help provide unified experiences across multiple channels and thus, elevated customer experience.

Achieving a single 360-degree view of customers and inventory is not a competitive advantage any more but a basic requirement. Retailers who meet this requirement can make room for technological innovations; build customer relationships; make strategic decisions; maximize growth and thus provide an overall consistent brand experience.

About Us



A Great Place to Work - 9 Glorious Wins in a Row

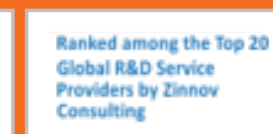


Quality Maturity Level



Technology Awards

Forrester Rated Aspire one of the Top Continuous Testing Service Providers (2017)



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