



***THE FUTURE OF  
E-COMMERCE***

# A GLOBAL STUDY

6 MARKETS



3.000 PEOPLE

Fielding: July 2021

# WHO ARE PROSUMERS?

LAGGARDS

MAINSTREAM

20%-30%  
PROSUMERS

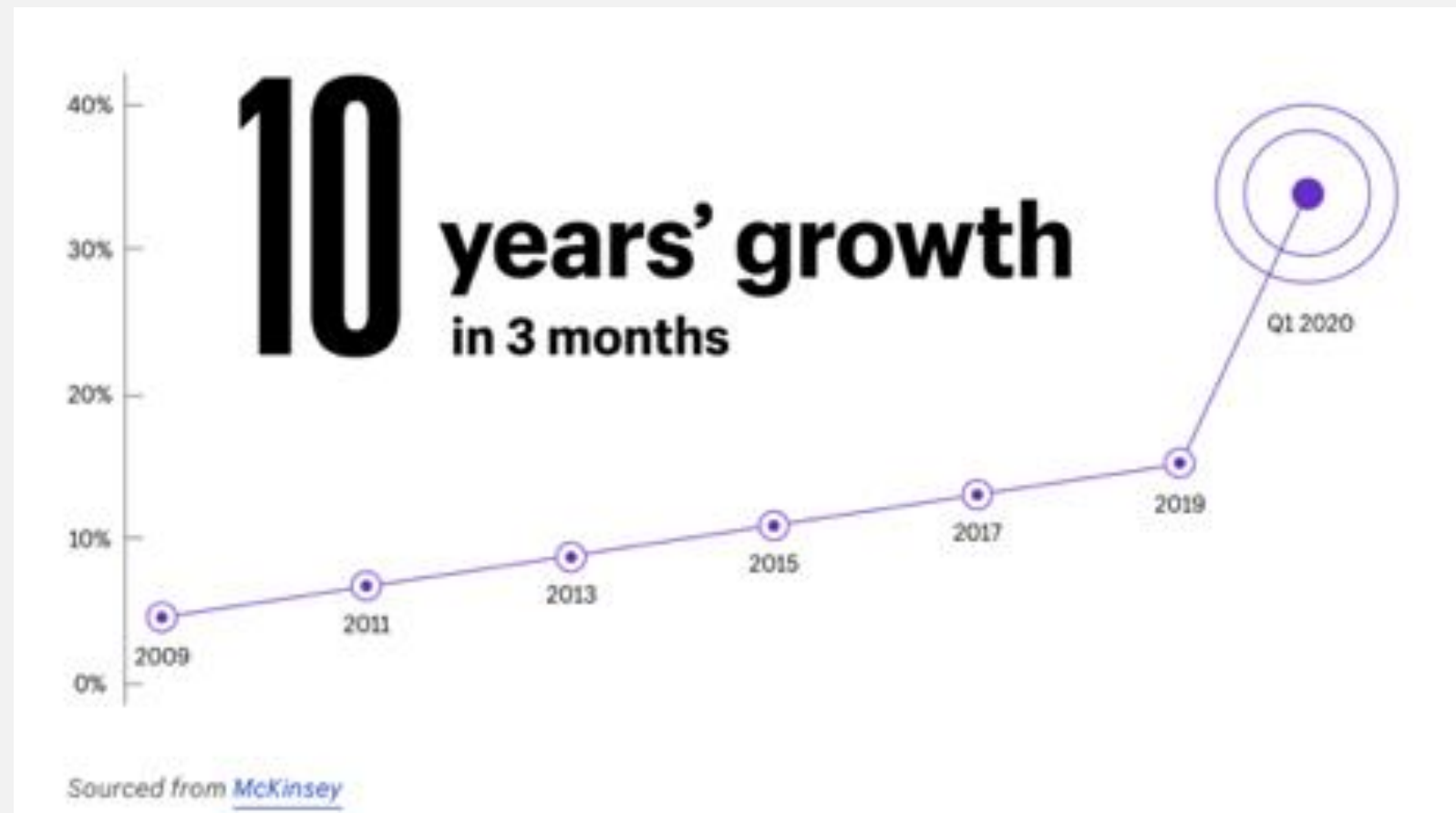
INSTIGATORS

PROSUMER  
ADOPTION

6-18  
MONTHS

Source: Havas Worldwide Prosumer survey, 2019

# U.S. E-COMMERCE PENETRATION IN %



# E-COMMERCE HAS BECOME A NEW NORM

**84%**  
PROSUMERS

**61%**  
MAINSTREAM

Nowadays, it feels like the e-commerce experience  
is better than the in-store experience.



60/40



80/51



89/77



74/46



94/74



93/82

**TO THE POINT IT  
HAS BECOME  
SECOND NATURE**

**79%**  
**PROSUMERS**

**53%**  
**MAINSTREAM**

During Covid-19, spending time  
surfing/shopping on e-commerce platforms  
was essential to keep me entertained.



49/24



79/46



80/70



75/47



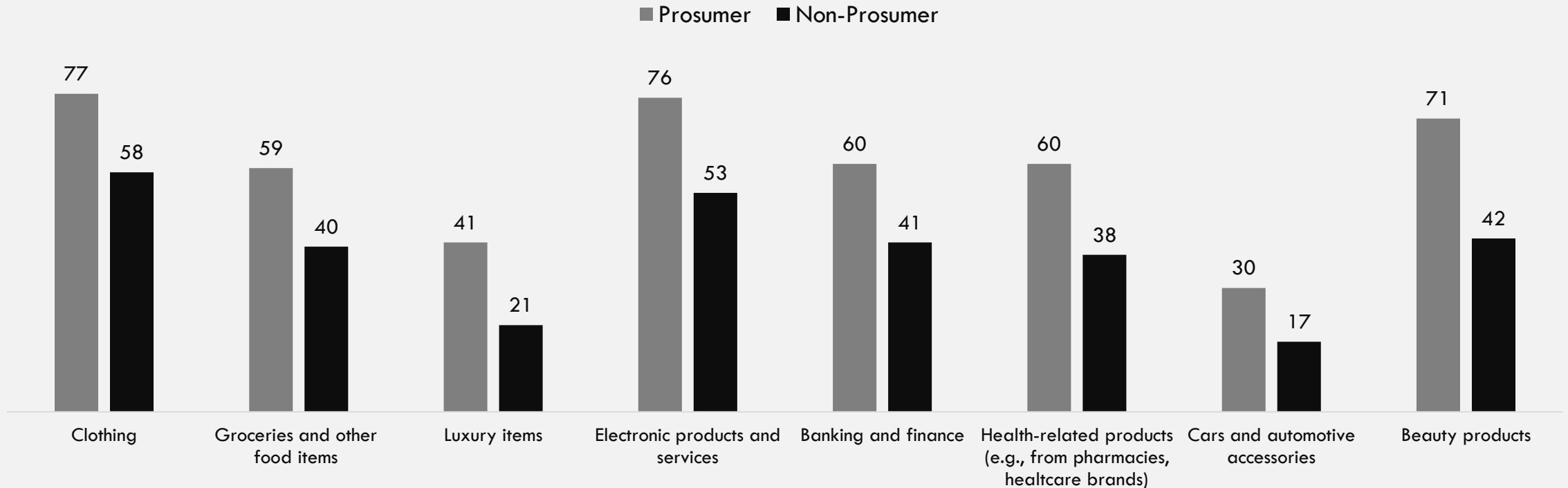
85/59



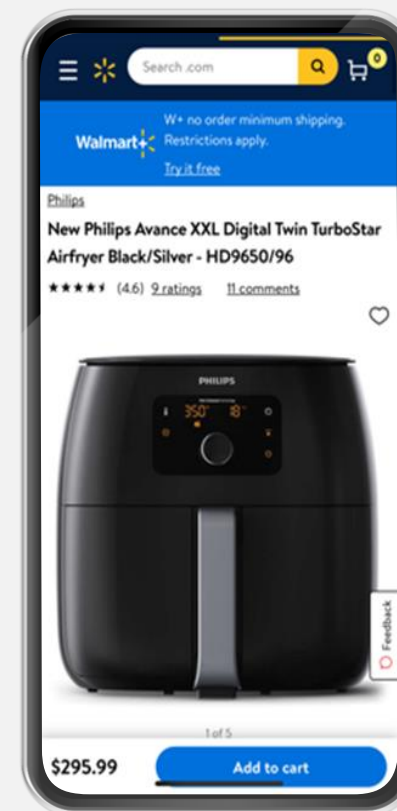
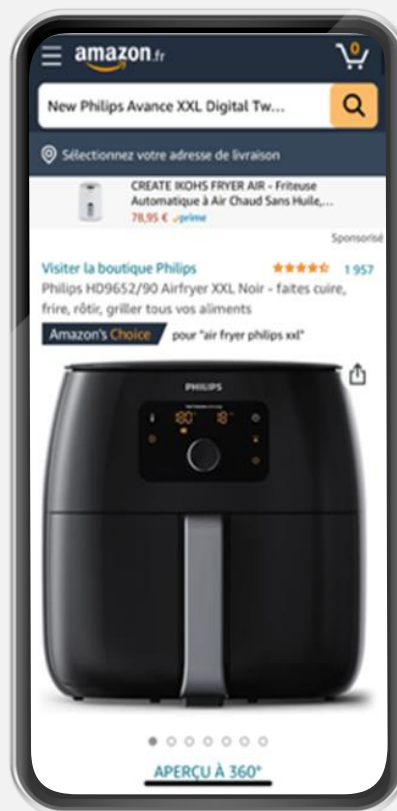
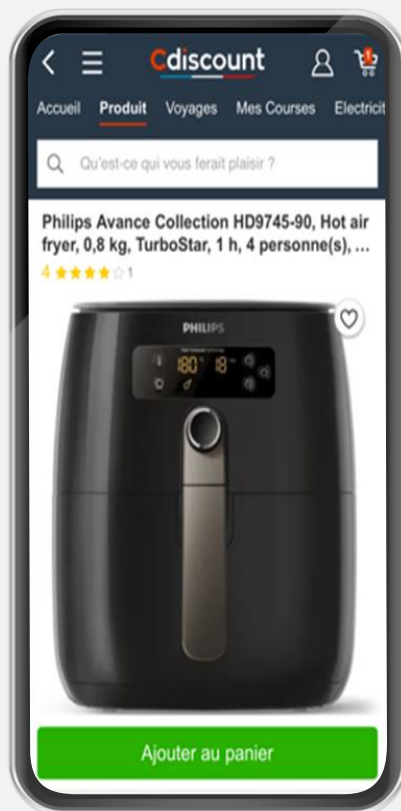
93/77

# IT WILL STAY THAT WAY FOR MANY CATEGORIES

After the COVID-19 crisis, I will be more likely to shop for these categories of products online rather than in-store:



# BUT IT HAS ALSO CREATED A HOMOGENEOUS SHOPPING EXPERIENCE



## E-COMMERCE MIGHT BE LOSING ITS LUSTER

**27%**  
PROSUMERS

**38%**  
MAINSTREAM

Buying online is convenient, but most of my  
e-commerce experiences are really boring.



32/24



35/44



22/45



45/46



19/17



19/46

A young person with dark hair, wearing a light blue face mask and a black t-shirt, is looking down at a smartphone. They are standing on a city street at night, with blurred lights and buildings in the background. A green hand-shaped light fixture is visible in the background.

# ESPECIALLY TO GEN Z

**44%**

GEN Z

**26%**

BOOMERS

Buying online is convenient, but most of my  
e-commerce experiences are really boring.

# **HOW TO MAKE E-COMMERCE SHINE?**

***WHEN CREATIVITY MEETS COMMERCE***

**1. THE NEW RULES OF E-COMMERCE**

**2. PURPOSE BEYOND CLICKS**

**3. BE ON THE RIGHT SIDE OF DATA HISTORY**

**4. FROM A PLACE TO BUY TO A PLACE TO SOCIALIZE**

# THE NEW RULES OF E-COMMERCE

## **The debt >90**

Free shipping & returns  
Fast & seamless delivery  
Good customer ratings

## **The nice to have >50**

Loyalty discounts  
Purchase recommendations  
Variety of options

## **Where you can make a difference >30**

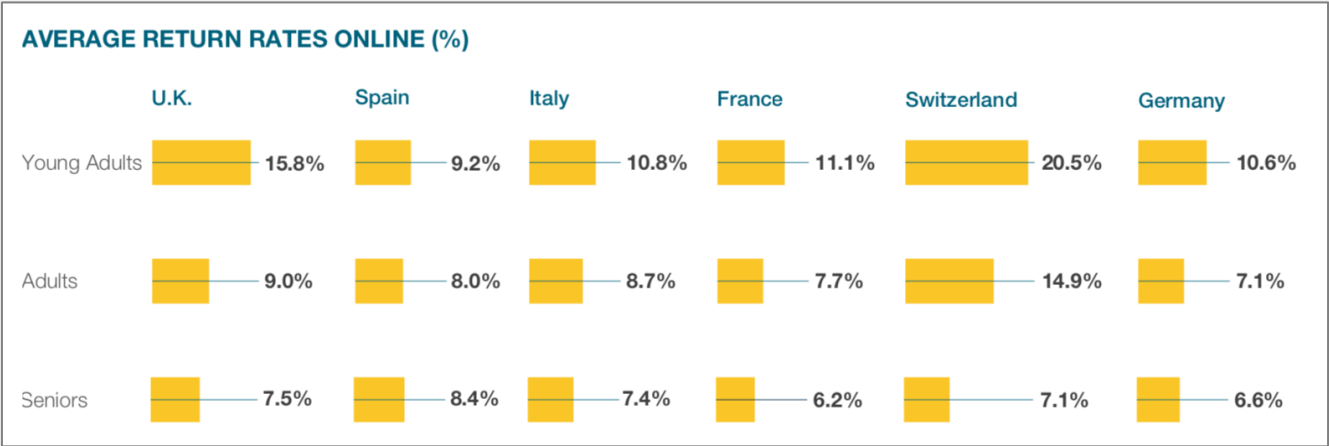
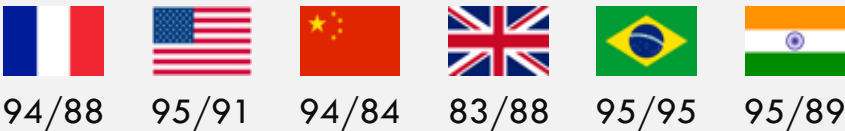
Inspiration board  
Mimic in-store experience  
Info about product impact

# FREE SHIPPING & RETURNS

93%  
PROSUMERS

89%  
MAINSTREAM

In a post-COVID-19 world, how important is each of the following website/app attributes? Free shipping & return.



# FREE SHIPPING & RETURNS

## Gold Lion – Creative E-commerce

Taking advantage of wardrobing while other e-tailers blacklist customers who return items too often.

**ENJOY BEFORE RETURNING**  
by DIESEL

**SOCIAL STRATEGY**  
Wearing clothes once and then returning them for a full refund (i.e. a "wardrobe") is a trend that costs the fashion industry \$2B billion/year.

**KEY**  
While most retailers unsuccessfully try to stop it by blacklisting customers, Diesel understood it and encouraged people to enjoy before returning.

For the launch of the 1989 collection, Diesel's return policy became the central part of the global campaign, the slogan of all new ad pieces where and social first photos will even feature it into a new for the 1989 film of the collection. The campaign was based on the global fashion show events, which will be held in various cities.

**RESULTS**  
Besides being the best of the best, the campaign helped Diesel actually reduce returns by 9% globally and 14% in e-commerce platforms while increasing sales and attracting new consumers by 24%.

**SALES UP +24%**  
**-14% ONLINE RETURNS**  
**-9% IN-STORE RETURNS**  
**96M MEDIA IMPRESSIONS**  
**OUR MOST BRANDED CAMPAIGN EVER**

**ELLE**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

**Esquire**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

**VOGUE**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

**LYNCH**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

**WWD**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

**GRACE**  
"DIESEL: THE NEW FASHION" THE NEW "DIESEL" COLLECTION

# SEAMLESSNESS & FAST DELIVERY

**95%**  
PROSUMERS

**85%**  
MAINSTREAM







Brands have a duty to make the product-return process as easy/seamless as possible.

**91%**  
PROSUMERS

**80%**  
MAINSTREAM

In a post-COVID-19 world, how important is each of the following website/app attributes? Fast delivery (within 1-2 days).

## Fundraising from operators of "dark stores" in millions of euros

	2,400
	1,200
	1,050
	335
	292
	125

# SEAMLESSNESS CASE STUDY

Inventing seamless experiences within a specific context: gaming

The advertisement is designed to appeal to gamers by integrating KFC's branding with gaming culture. At the top, a sequence of keyboard keys is shown: a Shift key, followed by a plus sign, then the 'K' key, another plus sign, the 'F' key, another plus sign, and finally the 'C' key. Below this sequence, the text reads "the **NEWEST & FASTEST** COOLEST WAY TO ORDER KFC".

In the center, a pair of hands is shown typing on a black gaming keyboard with red accents. To the left of the keyboard, there is a block of text that reads: "By 2020, there will be 1.5 billion gaming players in the world. They are impatient about and to speed up their performance is, because they never want to stop playing. Even so, we learned a way to order KFC without interrupting gaming time, by using a popular gaming convention: The cheat code. And the legend's name itself." Below this text is a small graphic of a cheat code: "KFC-123456".

To the right of the keyboard, there is a list of four bullet points, each preceded by a red icon of a computer monitor: "Launched across 11 countries in the Middle East", "61 Production cost", "Just by adding a single box of code to our platform", and "> 300% increase in online orders".

At the bottom of the advertisement, there is a row of six small images: a KFC mobile app interface, a man holding a banana, a close-up of a red keyboard key, a KFC restaurant interior, a KFC sign, and a KFC logo featuring a chicken head.

The bottom of the image shows a dark navigation bar with various logos and text, including "AdAge", "brandpoint", "campaign", "creativestudio", "Mashable", "TAXI", "LIFE", "gameformer", "LOGANER", "O-RGN", and a small icon of a shopping cart.

# CUSTOMER RATINGS

93%  
PROSUMERS

79%  
MAINSTREAM

In a post-COVID-19 world, how important is each of the following website/app attributes? Access to customer reviews/ratings.



87/67



93/76



94/82



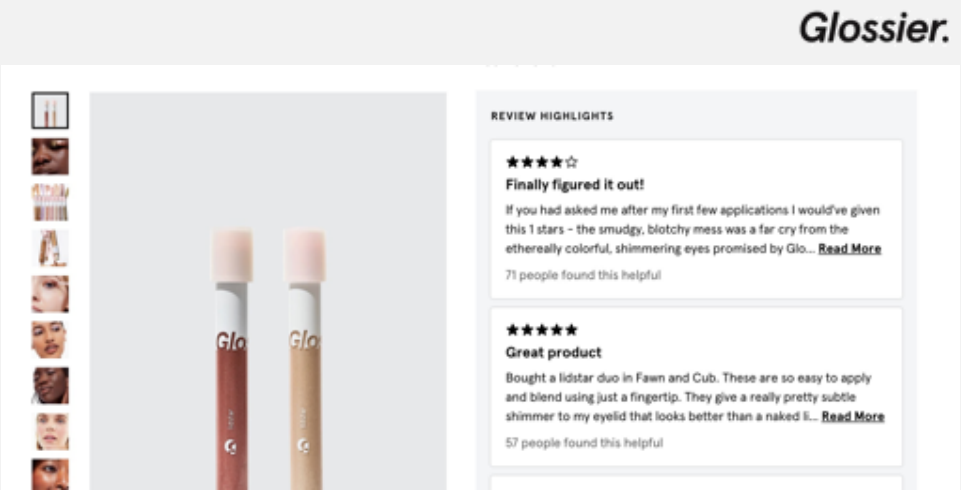
88/73



94/86



97/90



# THE NEW RULES OF E-COMMERCE

## **The debt > 90**

Free shipping & returns  
Fast & seamless delivery  
Good customer ratings

## **The nice to have > 50**

Loyalty discounts  
Purchase recommendations  
Variety of options

## **Where you can make a difference > 30**

Inspiration board  
Mimic in-store experience  
Info about product impact

# LOYALTY DISCOUNTS

**87%**

**PROSUMERS**

**79%**

**MAINSTREAM**

In a post-COVID-19 world, how important is each of the following website/app attributes? Loyalty discounts.



86/80



84/72



88/77



81/72



91/90



87/83

**Le paiement mobile de Starbucks plus populaire que ceux d'Apple et Google**



## PURCHASE RECOMMENDATIONS

**77%**  
PROSUMERS

**56%**  
MAINSTREAM

In a post-COVID-19 world, how important is each of  
the following website/app attributes?  
Recommendations based on past purchases.



64/45



65/46



85/67



66/43



81/69



88/71

# VARIETY OF OPTIONS

**43%**

**PROSUMERS**

**42%**

**MAINSTREAM**

What are the most important elements of a good mobile e-commerce experience?  
Gives me a variety of payment options.



32/43



48/36



23/28



43/34



56/60



54/51

**IKEA Becomes First Retailer To Let Customers Pay Using Time**

**REVENDEUR SON ANCIEN TÉLÉPHONE LORS D'UN ACHAT SUR BACK MARKET ?**

BackMarket

Le Blog

**Le bitcoin : une méthode de paiement désormais acceptée par les e-commerces**

ECN

# THE NEW RULES OF E-COMMERCE

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Free shipping & returns  
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Good customer ratings

## **The nice to have > 50**

Loyalty discounts  
Purchase recommendations  
Variety of options

## **Where you can make a difference > 30**

Inspiration board  
Mimic in-store experience  
Info about product impact

# INSPIRATION SHOPPING

**47%**  
PROSUMERS

**31%**  
MAINSTREAM

I think brands could make the e-commerce experience more fun by:  
Allowing people to create inspiration boards on-site (Pinterest).



39/18



53/26



44/38



34/23



48/33



60/50



# MIMIC IN-STORE EXPERIENCE

**33%**

**PROSUMERS**

**25%**

**MAINSTREAM**

What are the most important elements of a good mobile e-commerce experience? Makes shopping fun, as enjoyable as an in-store experience.



29/20



34/21



41/36



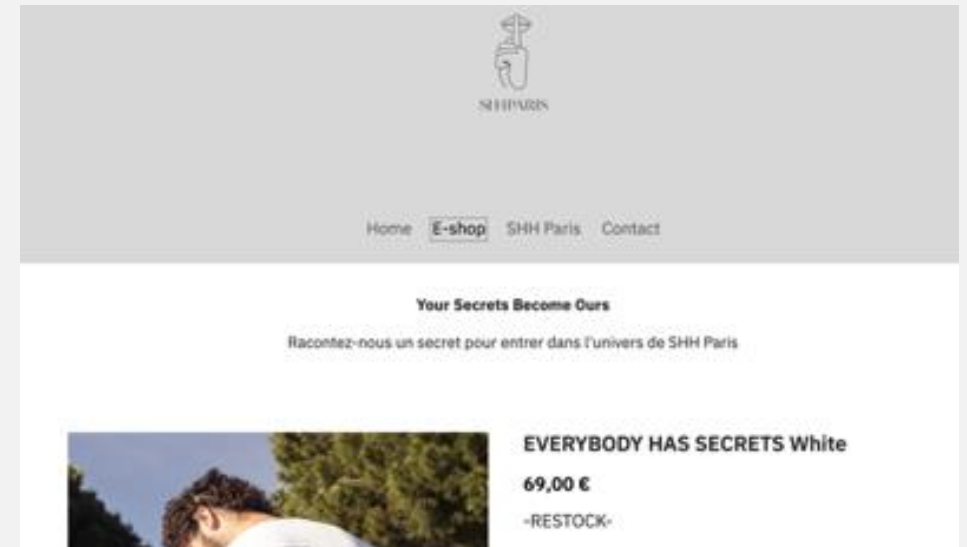
30/19



28/20



37/35



# MINDFUL INFORMATION

35%  
PROSUMERS

28%  
MAINSTREAM

What are the most important elements of a good mobile e-commerce experience? Provides information that helps me shop mindfully (e.g., product sourcing, environmental impact).



choose



**Craquez pour le produit ayant les valeurs qui vous ressemblent.**

Aujourd'hui, nous avons besoin de mettre du sens derrière les produits que nous consommons. C'est pourquoi nous avons sélectionné cette crèmerie parisienne qui produit dans son atelier de Montmartre et cette crème 100% naturelle et non testée sur les animaux.

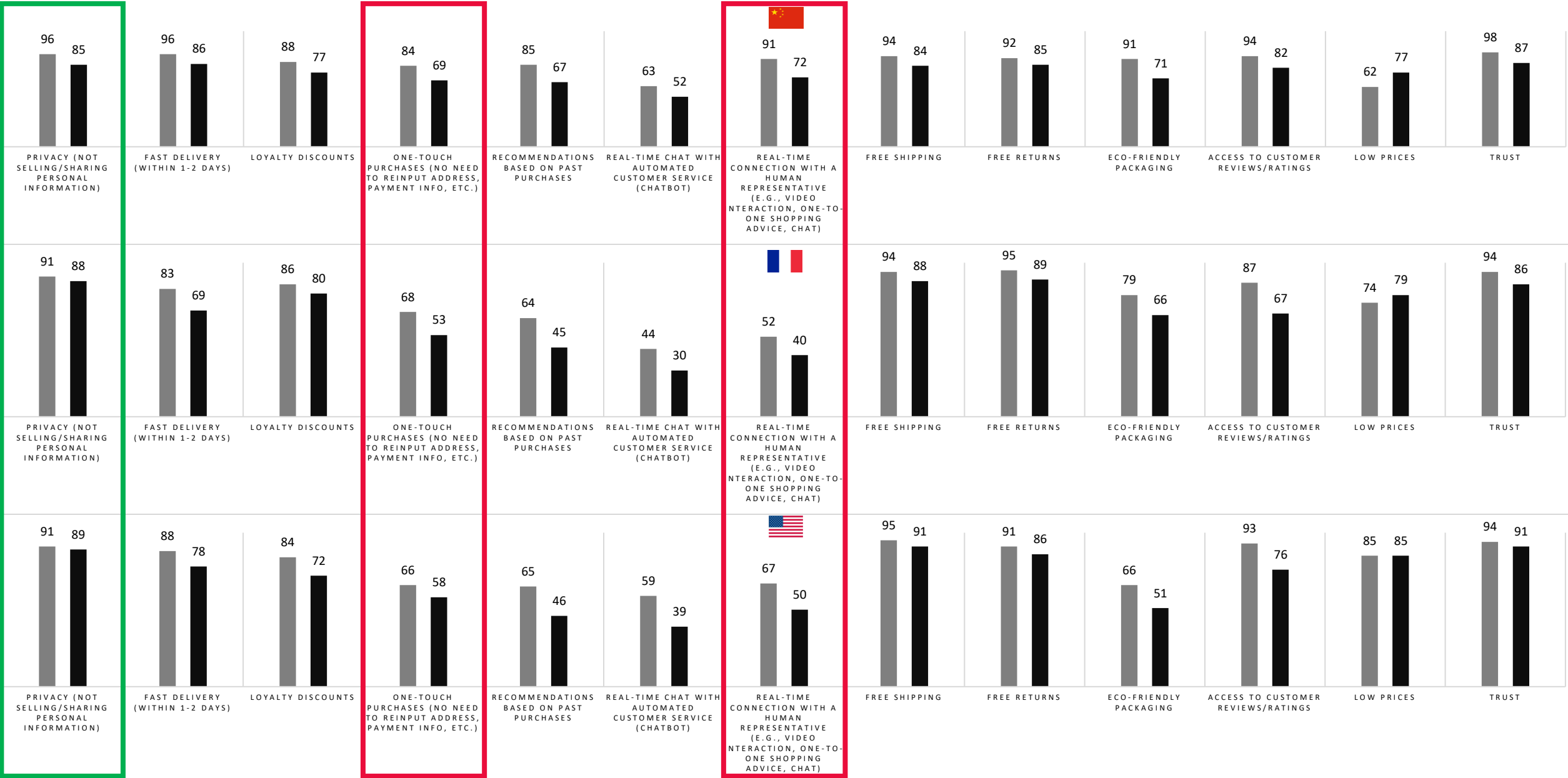
Notre mission est de mettre en lumière et sublimer ces belles histoires.

#CHOOSE.THE.FUTURE

- MADE IN FRANCE
- PREMIUM
- UPCYCLING
- FAIT MAIN
- NATUREL
- CADEAU PARFAIT
- BIO

IN A POST-COVID-19 WORLD, HOW IMPORTANT IS EACH OF THE FOLLOWING WEBSITE/APP ATTRIBUTES?

Prosumer Non-Prosumer



**1. THE NEW RULES OF E-COMMERCE**

**2. PURPOSE BEYOND CLICKS**

**3. BE ON THE RIGHT SIDE OF DATA HISTORY**

**4. FROM A PLACE TO BUY TO A PLACE TO SOCIALIZE**

**E-COMMERCE  
HAS TO BE  
ABOUT MORE  
THAN JUST  
ACCESS**

**58%**  
**PROSUMERS**

**55%**  
**MAINSTREAM**

In the future, I expect tech companies like  
Alibaba and Amazon to: Ban products/services  
that have a negative impact on society.



58/47



53/43



45/63



56/54



68/62



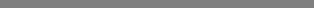
64/63



**PLANET**



**PEOPLE**



**PRODUCTS**

# SUSTAINABLE FROM BEGINNING TO END

83%

PROSUMERS

70%

MAINSTREAM

In a post-COVID-19 world, how important is each of the following website/app attributes? Eco-friendly packaging.



79/66



66/51



91/71



71/67



85/77



95/87

51%

PROSUMERS

38%

MAINSTREAM

The COVID-19 crisis has changed my shipping expectations in the following ways: I expect my deliveries to be green and sustainable (e.g., local delivery, delivery by bike).



48/34



28/19



52/52



35/26



57/36



69/61



---

**PLANET**



---

**PEOPLE**



---

**PRODUCTS**

# TAKE CARE OF YOUR PEOPLE

**51%**  
PROSUMERS

**38%**  
MAINSTREAM

The COVID-19 crisis has changed my shipping expectations in the following ways: I expect the delivery employee to be paid well.





---

**PLANET**



---

**PEOPLE**



---

**PRODUCTS**

# RE-COMMERCE AS THE FUTURE OF E-COMMERCE

**33%**

**PROSUMERS**

**33%**

**MAINSTREAM**

For me, the future of e-commerce will be:  
Platforms that focus on secondhand products  
(fashion, home décor, electronics, etc.).



52/37



35/28



13/31



36/28



30/30



43/44

**2%**

2% of the total weight of the fashion and luxury sector, the  
global second-hand market should grow by 15 to 20% per  
year over the next five years (*Boston Consulting Group x  
Vestiaire Collective*).

1. THE NEW RULES OF E-COMMERCE

2. PURPOSE BEYOND CLICKS

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4. FROM A PLACE TO BUY TO A PLACE TO SOCIALIZE

# PRIVACY IS GAINING MOMENTUM

**94%**  
PROSUMERS

**89%**  
MAINSTREAM

In a post-COVID-19 world, how important is each of the following website/app attributes? Privacy.



91/88



91/89



96/85



91/87



97/95



97/90

**DATA  
EDUCATION  
SHOULD BE  
MANDATORY**

**89%**  
**PROSUMERS**

**78%**  
**MAINSTREAM**

I am vigilant with my children so they avoid  
sharing their data on the internet.



86/80



86/76



88/75



93/74



96/89



81/77

# JUDGMENT DAY HAS ARRIVED

**76%**

PROSUMERS

**65%**

MAINSTREAM

I am ready to boycott brands that  
are too intrusive with my data.



87/65



70/58



86/75



75/65



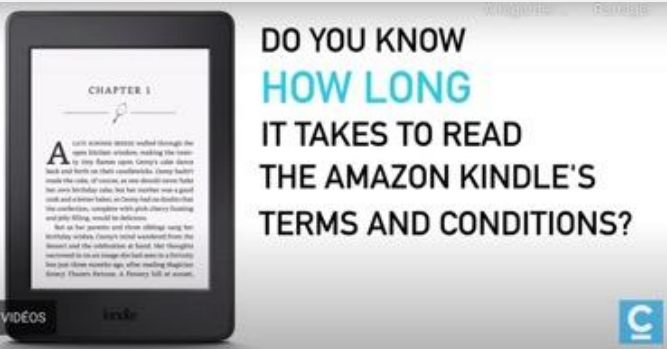
61/53



83/76



# HASSLE FREE TRANSPARENCY IS A MATTER OF UX



DO YOU KNOW  
**HOW LONG**  
IT TAKES TO READ  
THE AMAZON KINDLE'S  
TERMS AND CONDITIONS?

**55%**  
PROSUMERS

**43%**  
MAINSTREAM

I think the measures to protect the use of my  
online data complicate my internet browsing.



**THE NEW DATA  
TRADE-OFF:  
BETTER CUSTOMER  
SERVICE**

**45%**  
**PROSUMERS**

**33%**  
**MAINSTREAM**

I'm willing to share my personal data with brands and companies if it guarantees: I will get better customer service.



46/21



38/27



62/53



45/29



52/33



57/55

# THE NEW DATA TRADE-OFF: READY TO PAY PEOPLE FOR THEIR DATA?

**53%**

**PROSUMERS**

I'm willing to share my personal data with brands and companies if it guarantees: I'll be financially compensated.



53/40



58/38



46/37



55/42



56/46



54/43

**43%**

**MAINSTREAM**

Facebook récolte depuis 2016 des données (très) personnelles sur des utilisateurs âgés de 13 à 35 ans. L'entreprise leur verse en échange une somme d'argent tous les mois.

**Using Aetna's new app and personalized rewards program could pay for your Apple Watch**

**1. THE NEW RULES OF E-COMMERCE**

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# TWO WAYS FORWARD

I

---

**E-COMMERCE  
BECOMING MORE  
HUMAN**

II

---

**E-COMMERCE  
MOVING TO  
SOCIAL**

# TWO WAYS FORWARD

I

---

**E-COMMERCE  
BECOMING MORE  
HUMAN**

II

---

**E-COMMERCE  
MOVING TO  
SOCIAL**

# ONE WAY: „COMMUNITIZING“ THE E-COMMERCE EXPERIENCE

**51%**

**PROSUMERS**

**37%**

**MAINSTREAM**

I think brands could make the e-commerce experience more fun by: Enabling people to shop together (like in real life).

**52%**

**PROSUMERS**

**33%**

**MAINSTREAM**

For me, the future of e-commerce will be: Platforms that allow shoppers to interact with one another.

Business

**Comment Pinduoduo a dépassé Alibaba pour devenir la plateforme de e-commerce la plus populaire de Chine**

*«C'est très ludique, on voit le prix descendre au fur et à mesure que l'on constitue un groupe»*

**Le Journal du Dimanche**

# TWO WAYS FORWARD

I

---

**E-COMMERCE  
BECOMING MORE  
HUMAN**

II

---

**E-COMMERCE  
MOVING TO  
SOCIAL**

# READY FOR SOCIAL COMMERCE?

**57%**  
PROSUMERS

**31%**  
MAINSTREAM

Being able to shop directly on social media  
will: Make the experience more fun.



31/14



41/19



77/55



38/13



65/36



66/51

# BUT IT WILL MAINLY DEPEND ON OUR REALTIONSHIP WITH INFLUENCERS

**60%** | **37%**  
PROSUMERS | MAINSTREAM

I like to discover and buy new  
products from influencers I follow.



38/16



47/31



71/59



51/23



68/32



70/65

# INFLUENCERS HAVE BECOME “SALES MONKEYS”

**73%**  
PROSUMERS

**69%**  
MAINSTREAM

I feel influencers on social media  
have become “sales machines”.



79/79



79/58



56/66



79/64



80/75



69/70

# THEY HAVE TO TAKE RESPONSIBILITY

84%

PROSUMERS

74%

MAINSTREAM

I want influencers to be held responsible for the products/services they recommend.



78/68



81/69



94/86



84/71



81/69



83/80

91%

PROSUMERS

79%

MAINSTREAM

Shopping via social media should require as much of a guarantee/information as traditional e-commerce experiences.



82/71



86/72



95/83



90/76



96/89



91/84

# WITH THAT IN MIND, LIVE SHOPPING HAS A PROMISING FUTURE

75%

PROSUMERS

54%

MAINSTREAM

I think live shopping sessions are a good way to make the e-commerce experience more fun and entertaining.



61/43



67/36



79/68



68/39



81/62



84/79

10%

of e-commerce sales in China are made via live-video.

GLOSSY

A dramatic scene from Star Wars: The Force Awakens showing Kylo Ren on the left and Rey on the right. They are in a lightsaber duel, with their blades crossed in the center of the frame, creating a bright white and yellow starburst effect. Sparks are flying from the point of impact. The background is a dark, cloudy sky. The text "THE EMPIRE VERSUS THE REBELS" is centered over the image in a white, bold, sans-serif font.

# **THE EMPIRE VERSUS THE REBELS**



# THE EMPIRE

**EASY, CHEAP AND FAST ACCESS TO EVERYTHING**

**EXPANDING IN EVERY POSSIBLE CATEGORY**

**DATA X PRODUCT X SERVICE**

**« I KNOW YOUR NEEDS AND COVER THEM ALL »**

**ONE STOP  
SHOP THAT  
KEEPS  
EXPANDING**

**70%**  
**PROSUMERS**

**61%**  
**MAINSTREAM**

For me, the future of e-commerce will be: Huge platforms where you can access everything you want quickly (e.g., Amazon, AliExpress).



58/48



69/58



62/57



64/52



77/74



88/78

**DATA  
X  
PRODUCT  
X  
SERVICE**

**61%**  
**PROSUMERS**

**39%**  
**MAINSTREAM**

I expect my e-commerce shopping experience to:  
Be tailored to my needs through personalization  
and artificial intelligence.



42/28



58/29



60/54



57/25



69/43



68/60

# THE REBELS

ALTERNATIVE VISION OF THE CATEGORY

HYPER SPECIALISTS

ENGAGEMENT X PLEASURE X SEGMENTATION

DIFFERENTIATING CUSTOMER EXPERIENCE



**THINK LOCAL**

**48%**  
**PROSUMERS**

**41%**  
**MAINSTREAM**

For me, the future of e-commerce will be:  
Websites that promote local producers.



56/43



52/35



29/32



44/40



51/39



61/56

# TIENDA CERCA BY AB INBEV



# RETHINK SECOND HAND

**33%**

**PROSUMERS**

**33%**

**MAINSTREAM**

For me, the future of e-commerce will be:  
Platforms that focus on secondhand products  
(fashion, home décor, electronics, etc.).



52/37



35/28



13/31



36/28



30/30



43/44



BACK MARKET ET FRIENDS

# PEOPLE OVER ALGORITHMS

**76%**  
PROSUMERS

**58%**  
MAINSTREAM

When shopping online, I prefer to get product recommendations from real people (e.g., influencers, my friends) rather than from an algorithm.



60/48



76/51



77/67



75/47



83/61



78/78

A dramatic scene from Star Wars: The Force Awakens showing Kylo Ren on the left and Rey on the right. They are in a lightsaber duel, with their blades crossed in the center of the frame, creating a bright white and yellow starburst effect. The background is a dark, starry space. The text "THE EMPIRE VERSUS THE REBELS" is overlaid in the center in a bold, white, sans-serif font.

# THE EMPIRE VERSUS THE REBELS

*Which one are you?*



***THANK YOU***