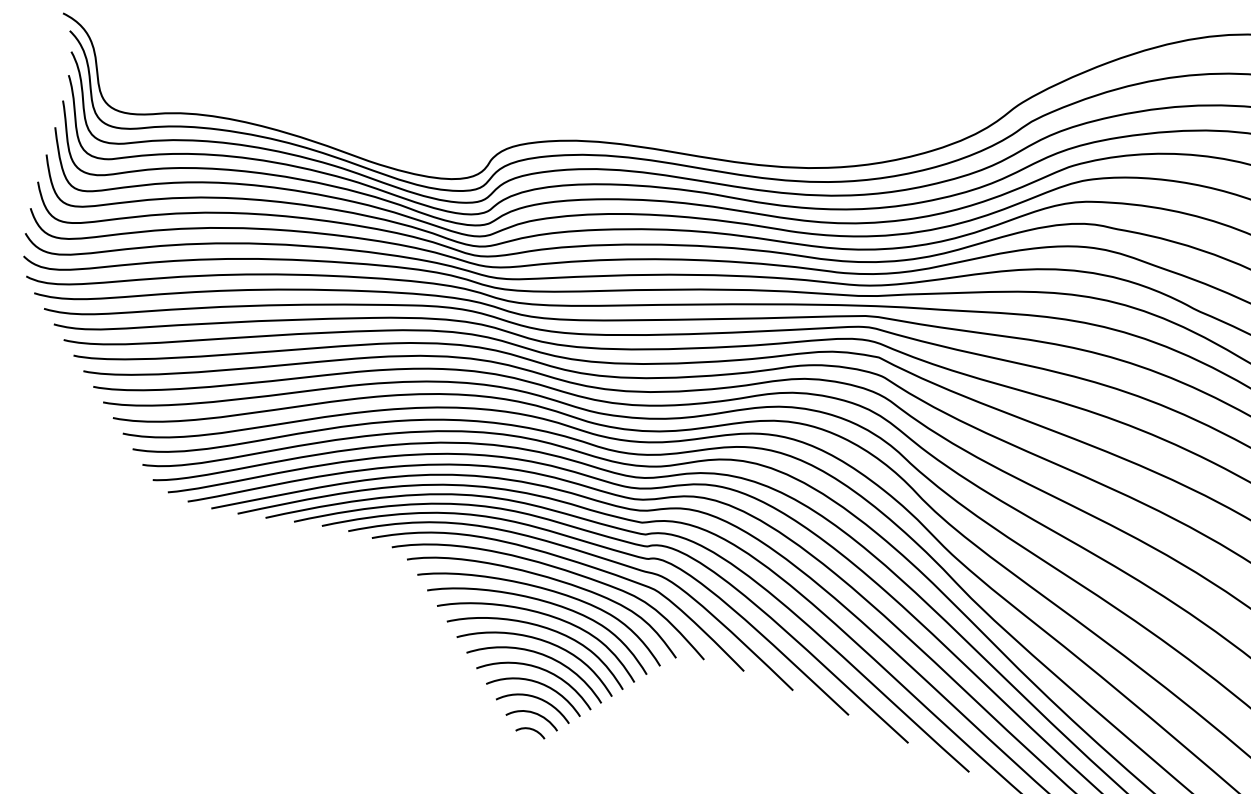
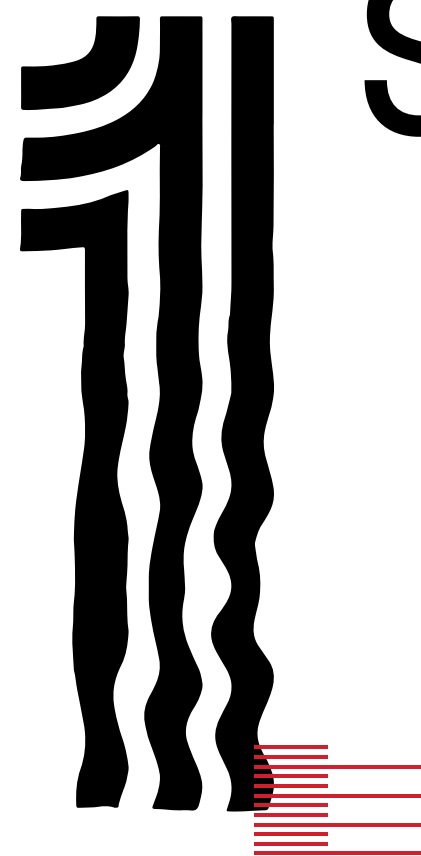


MOOD:MEDIA™

SHOPPER SENTIMENTS



JUNE 2021

INTRODUCTORY NOTE

Scott Moore

Mood Media

Global Chief Marketing Officer

WHAT IS NORMAL NOW?

MOOD:MEDIA
2021 SHOPPER
SENTIMENTS

As the world slowly starts to come out of the COVID pandemic and settles back into a “normal” shopping mentality, it begs the question: **what is “normal” now?** Are shoppers going to behave as though the pandemic never happened, or will some of the attitudes and behaviors they adopted during the pandemic remain with them long into the future?

This month (June 2021), as a follow-up to a September 2020 study in which we asked 8,000 consumers in four different parts of the world about their shopping activities during the pandemic, we asked 8,000 consumers in those same countries - the US, UK, France and China - how they’re feeling and behaving today.

In the majority of cases, shoppers around the globe say it “feels good” or “feels really good” to return to physical stores and experience the things they say they most missed - and most enjoy - about brick and mortar retail vs online shopping: the ability to touch and try products, the instant gratification of taking something home immediately, the joy of discovery when shopping as a leisure activity, and the fun of shopping with friends or family.

80% of all shoppers say they are now comfortable or “very comfortable” returning to physical stores, even though some still worry a bit about catching Covid-19 (32% “somewhat agree” that they still worry, while 16% “strongly agree”). 65% of shoppers say they’re not yet visiting stores as frequently as they did before Covid-19 happened, but 29% say they’re spending more money per visit (46% say they’re spending “more or less the same”).

While 46% of all shoppers say they miss the pre-pandemic world in which “I didn’t have to wear a mask,” there are some habits they’ve embraced as a result of COVID and would like to see continue. 38% would like stores to continue offering hand sanitizers at entrances, and 31% say they enjoy the merging of physical and digital and want click-and-collect (or curbside pickup) to remain in place.

It seems that consumers grew most comfortable with changes in their grocery shopping habits, as 24% now say they would rather continue shopping online for groceries than return to stores. Again, this appears to be a growing indication of consumer comfort levels with the merging of physical and digital commerce.

With so many consumers eager to “feel good” about shopping again, now is the time for retailers to rise to the occasion and ensure that they’re delivering an elevated Customer Experience. Your shoppers are ready to embrace you. Are you ready for them?

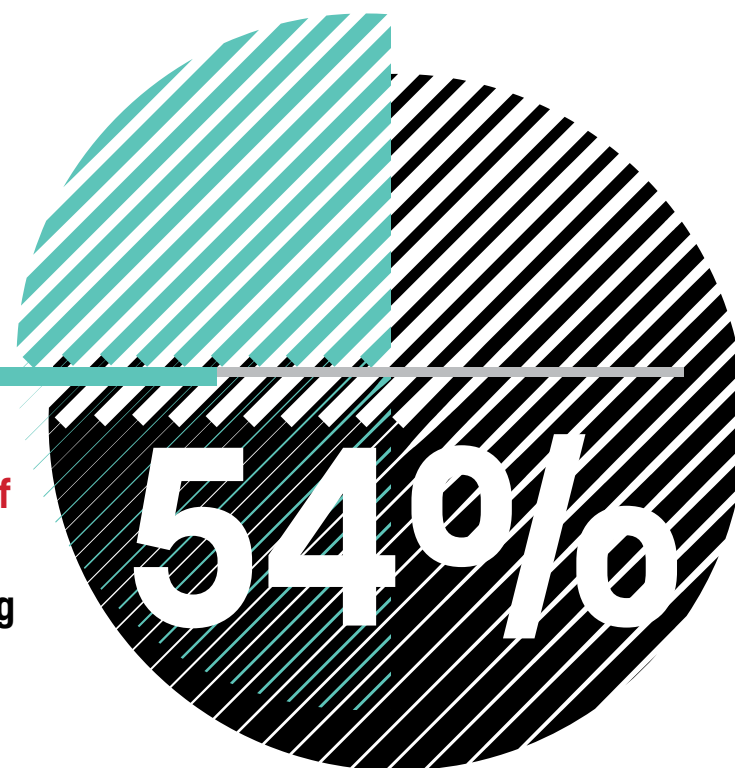


CONSUMERS
GLOBALLY FEEL
COMFORTABLE
ABOUT RETURNING
TO PHYSICAL
STORES



of consumers globally
feel comfortable visiting
physical stores now,
up from **71%** in 2020.

Shopping in-store feels
good for **more than half of
global consumers (54%)**
- (33%) of them declaring
it feels really good



86%

Consumers in the **US are the most comfortable** with in-store shopping as of mid-2021, at **86%**, up from **68%** in September 2020.



76%

While **in 2020 the UK was the most cautious** about returning to the physical retail space, **consumer confidence has since jumped from 62% to 76%**.



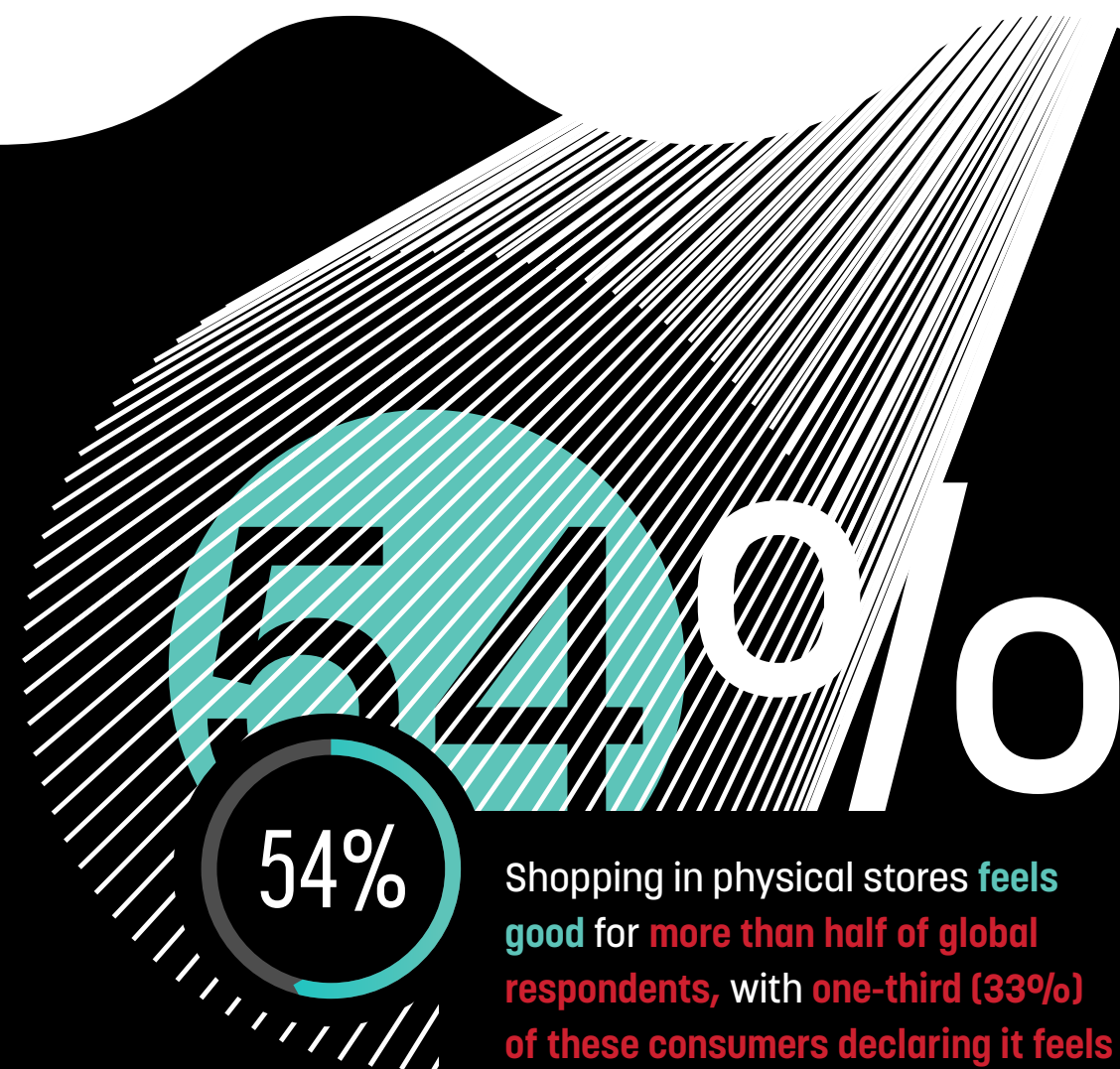
5%

Only **5%** globally cite **not feeling comfortable at all** about returning to stores, while **16%** report **feeling not very comfortable** doing so.

SHOPPING
FEELS
GOOD

MOOD:MEDIA
2021 SHOPPER SENTIMENTS

SHOPPING IN STORES FEELS GOOD FOR MORE CONSUMERS NOW, DESPITE REMAINING CONCERN OF CATCHING COVID-19



54%

Shopping in physical stores feels good for more than half of global respondents, with one-third (33%) of these consumers declaring it feels really good.

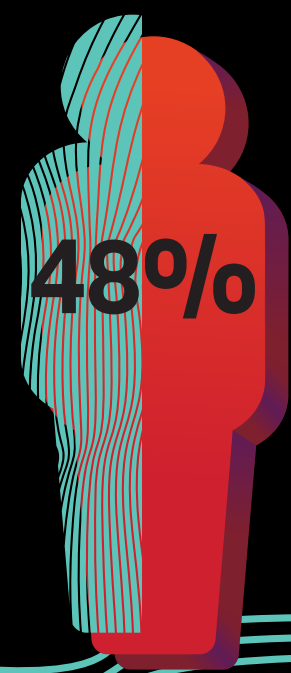
54%

Over half (54%) now report having a positive experience in-store, compared with 24% who cite a more negative store experience.



The most feel-good consumers when it comes to in-store shopping are the Chinese (69%) and Americans (62%), with half of the latter declaring it feels really good.

ONLY 6% OF CONSUMERS GLOBALLY HAVE YET TO RETURN TO PHYSICAL STORES.



48% of consumers globally are still worried about catching COVID-19 when visiting physical stores (in line with 2020 results at 49%)

Least worried about catching the virus in-store

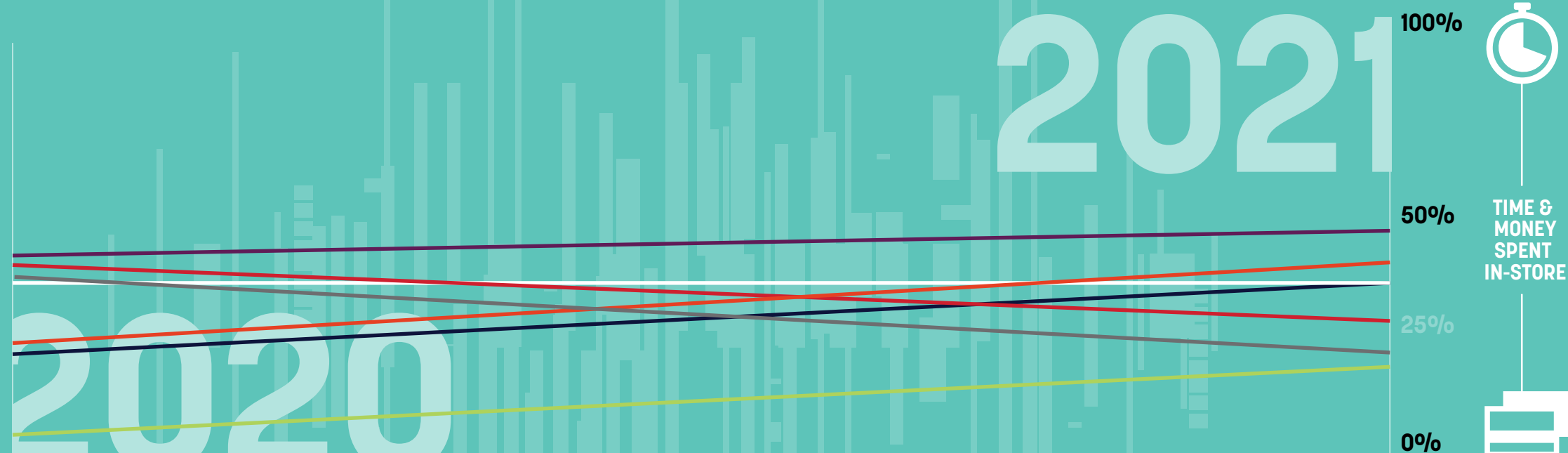
- French - 30%
- Chinese - 50%

Most concerned about catching the virus in-store

- 25-34 YEARS OLD - 53%
- 16-24 YEARS OLD - 46%



CONSUMERS' SPENDING HABITS ARE RETURNING TO PRE-PANDEMIC LEVELS



The majority of global respondents cite they are **spending around the same amount of time and money in-store as before the pandemic (29%)**.

17% of global consumers are now spending more time and money in-store compared to their pre-pandemic levels, versus just 3% who cited this in September 2020.

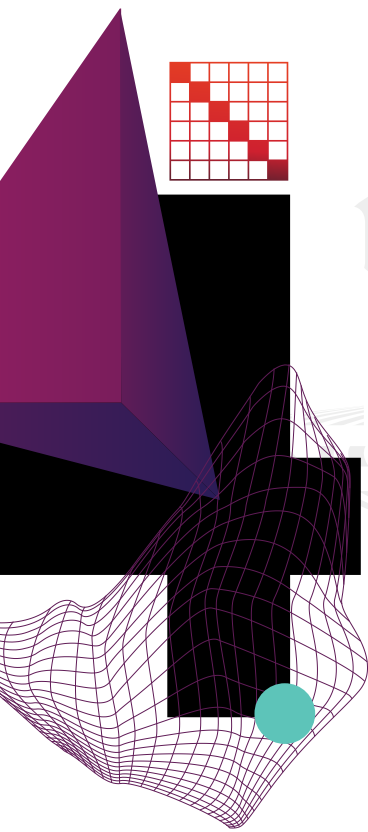
Consumers who reported **spending more** compared to before the pandemic **increased from 23% in September 2020 to 29% in June 2021**.

Respondents who cited **spending less** compared to before the pandemic **decreased from 38% in 2020 to 25% today**.

Consumers **spending the same as before** the pandemic **increased from 40% to 46%**.

The **steepest increase in consumer spending compared to before the pandemic is seen in the US, up from 26% in 2020 to 37% in 2021**.

20% of consumers globally report spending both less money and less time shopping in-store than before COVID-19, down from 31% in 2020.






CONSUMERS HAVE MISSED THE **SOCIAL AND LEISURELY** SIDE OF SHOPPING, WITH THE **SENSES** STILL THE MAIN DRIVER FOR DECIDING TO BUY IN STORES



The possibility of touching and trying products on the spot is what global consumers found they **couldn't replace and missed the most** when stores were closed.




DRIVERS DECIDING TO BUY IN STORES VERSUS ONLINE

- 1 59% THE ABILITY TO FEEL, TOUCH AND TRY THE PRODUCT ALSO CONTINUES TO RANK AS THE #1 
- 2 51% THE CONVENIENCE OF TAKING THE PURCHASE HOME 
- 3 45% THE ABILITY TO BROWSE AND DISCOVER NEW THINGS 

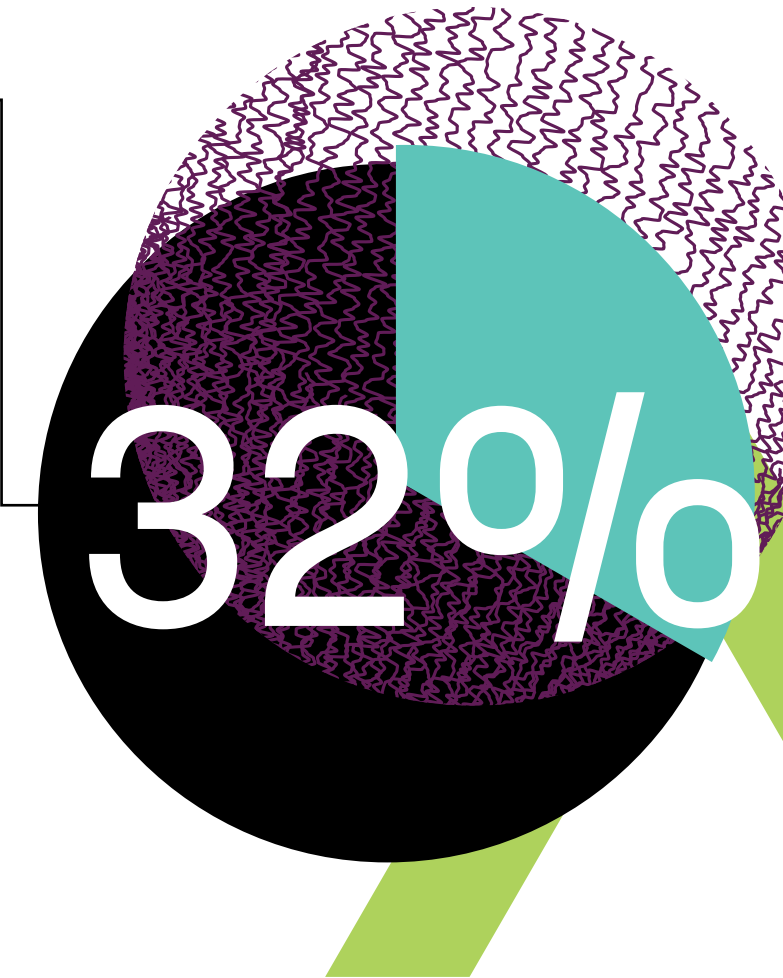


France is the only market to rank **the ability to browse and discover new things** as their second most important reason for in-store shopping, **with (47%) missing this aspect.**

WHAT SHOPPERS MISSED

- 1 45% POSSIBILITY OF TOUCHING AND TRYING PRODUCTS ON THE SPOT 
- 2 35% SOCIAL ASPECT OF SHOPPING WITH FRIENDS AND LOVED ONES 
- 3 35% POSSIBILITY OF BRINGING PURCHASES HOME IMMEDIATELY 

32% OF GLOBAL CONSUMERS DECLARE HAVING MISSED THE LEISURELY SIDE OF SHOPPING IN STORES. CHINESE CONSUMERS HAVE MISSED THIS ASPECT EVEN MORE (40%), WITH 16-24 YEAR-OLDS HAVING MISSED IT THE MOST GLOBALLY (34%).





SOME STORES ARE MISSED MORE THAN OTHERS



Global shoppers cite they **have missed visiting Shopping Malls (38%) and Fashion and Clothing Stores (36%) the most** during the pandemic.

Shopping Malls are also ranked as the top spot missed by Chinese (61%) and US respondents (40%).

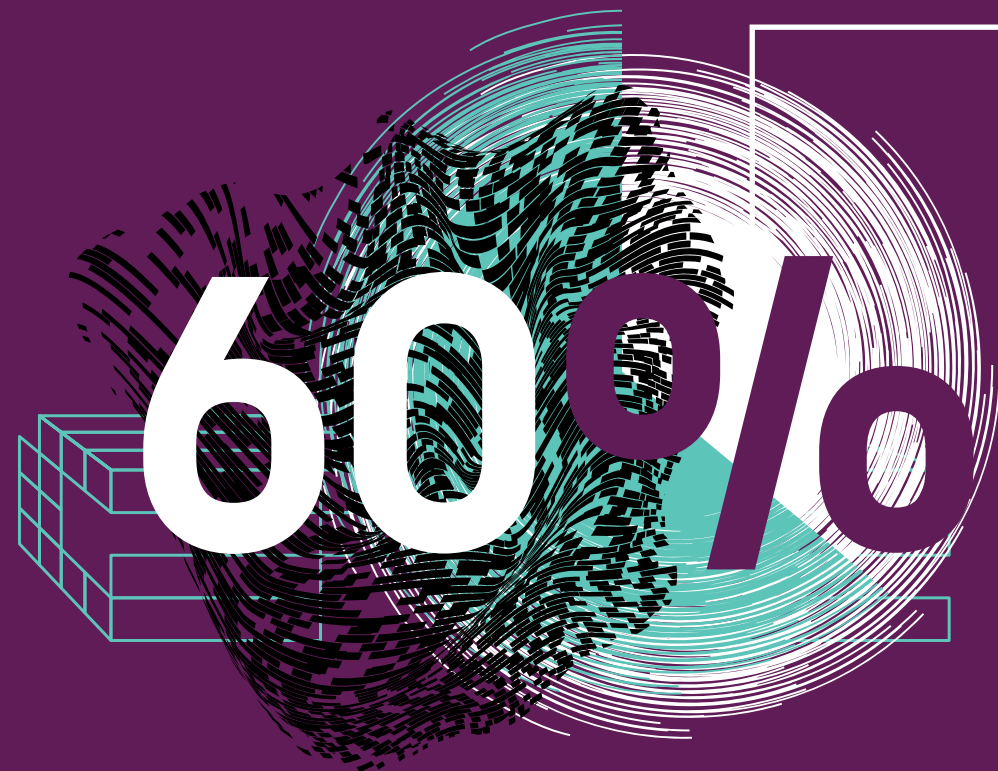
French consumers have missed Fashion Stores the most (46%), followed by the **Brits (30%).** In the US, **Grocery Stores are the second most missed store type to visit (30%),** despite them largely remaining open to the public.

Fashion and Clothing Retailers is also the top pick among **women in France (59%) and women in the UK (43%).**

For men, Fashion and Clothing Retailers is the most-missed store of choice in France (33%) while **Shopping Malls takes the lead among men in China (57%), the US (32%), and the UK (21%).**



THE NEW NORMAL IS SETTLING IN

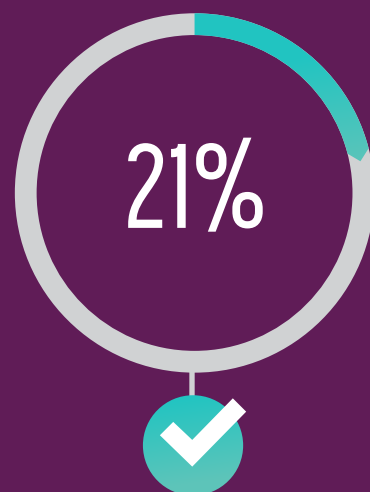


OF CONSUMERS GLOBALLY EXPECT THEIR SHOPPING HABITS TO GO BACK TO PRE-PANDEMIC LEVELS BY THE END OF 2021

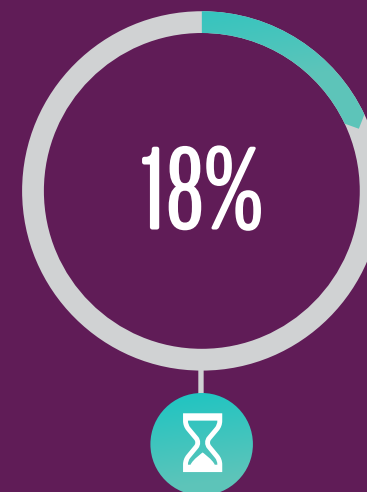


The **least optimistic group** is the UK, with **14%** saying their habits will **never return** to pre-pandemic levels.

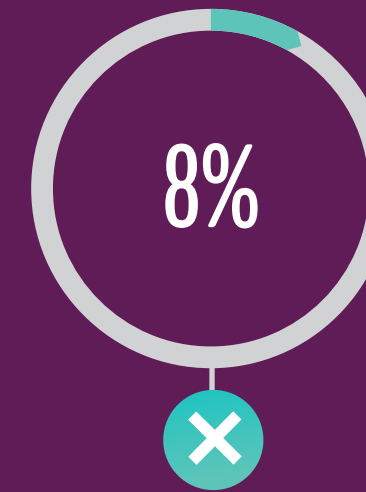
The **most optimistic group** are US males, with **74%** expecting their habits to go **back** to pre-pandemic levels by the end of this year (2021).



Global respondents report their **shopping habits have already returned to pre-pandemic levels.**

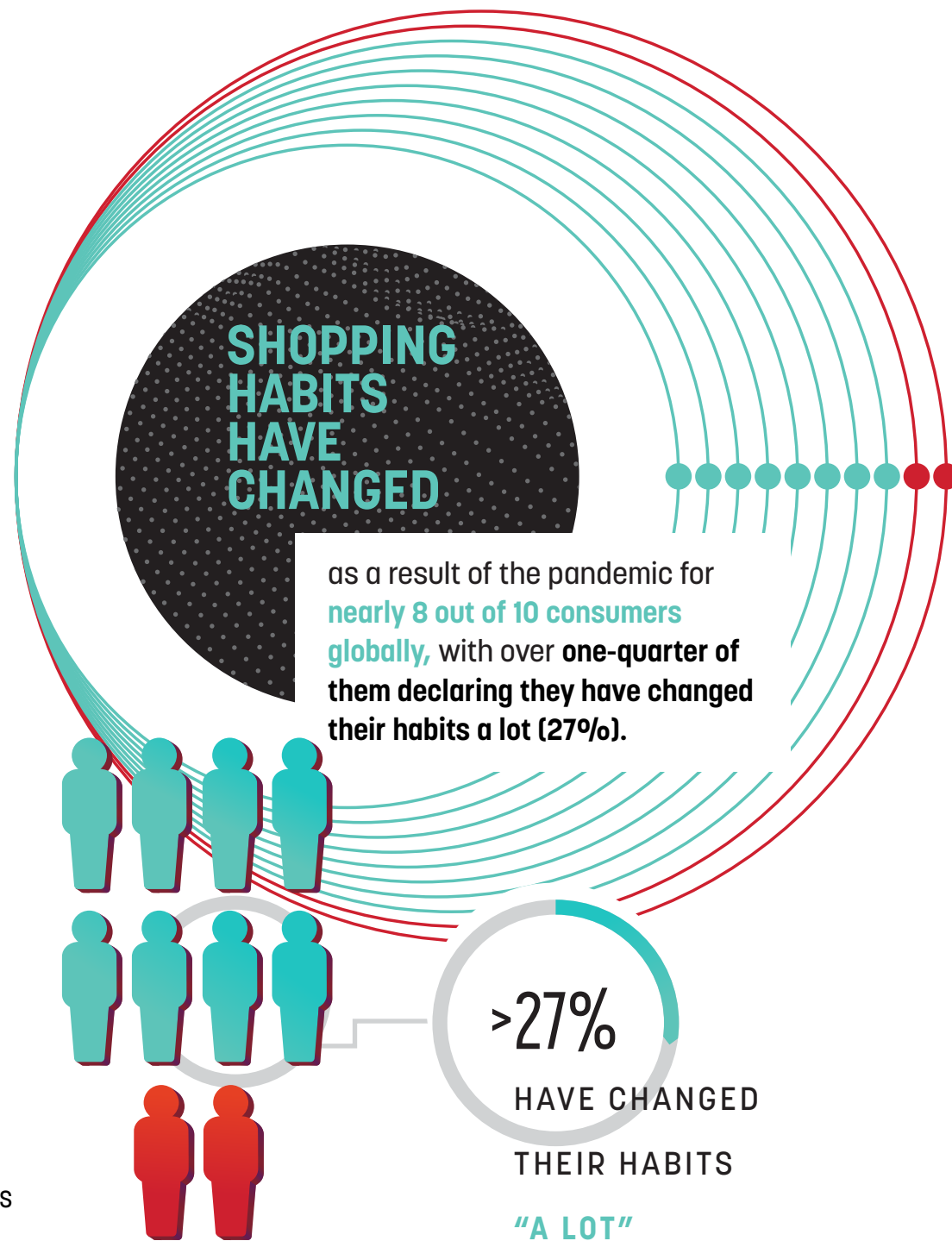


Expect it will take at least **another year - until the summer of 2022 - before their shopping habits return to pre-pandemic norms.**

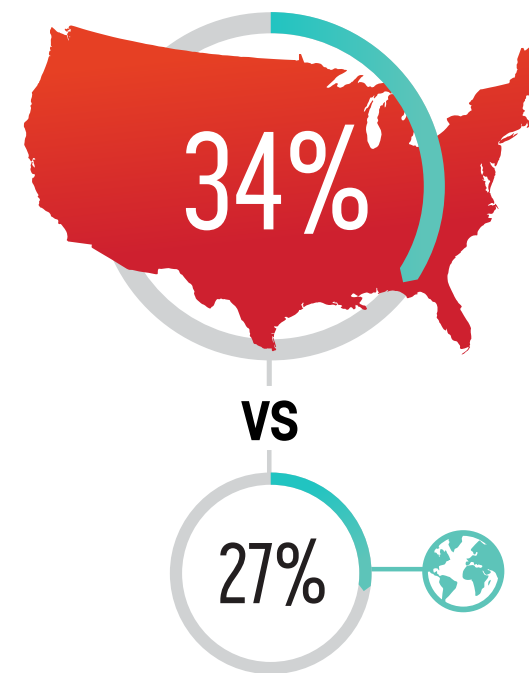


Only 8% of global consumers **never expect their shopping habits to return to pre-pandemic levels.**

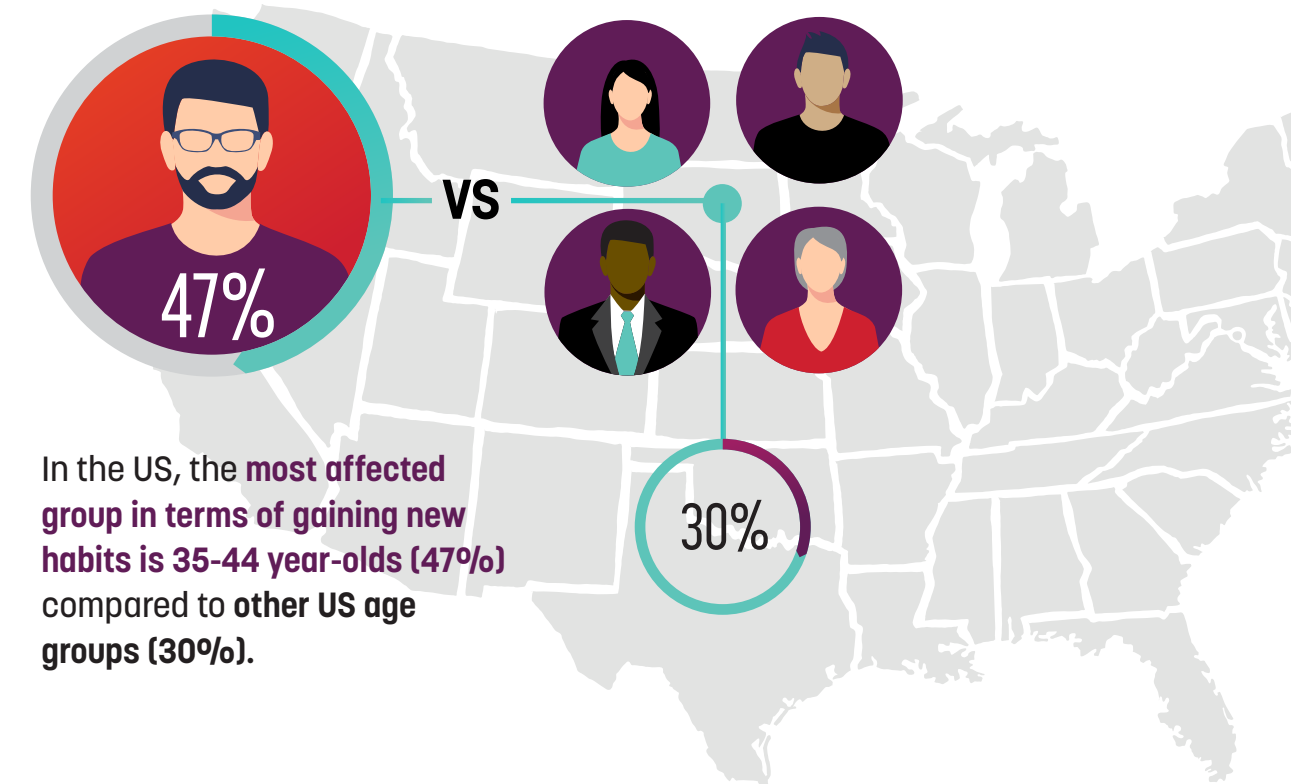
NEW
NORMAL,
NEW
HABITS



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Consumers in the US declare that their shopping habits have changed a lot - **more than any other country surveyed (34% of US respondents versus 27% of respondents globally)**.



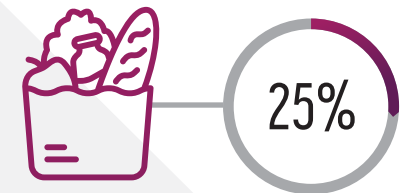
In the US, the **most affected group in terms of gaining new habits is 35-44 year-olds (47%)** compared to **other US age groups (30%)**.



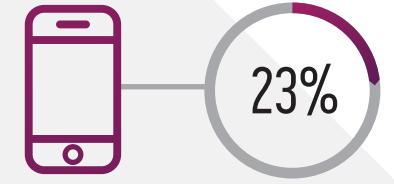
NEW
NORMAL,
NEW
HABITS



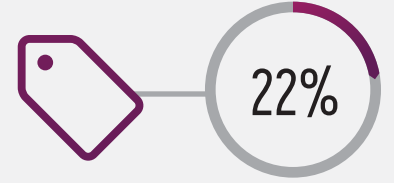
**CONSUMERS MAY
CHOOSE TO CONTINUE
TO DO SOME TYPES OF
THEIR SHOPPING ONLINE.**



**#1 GLOBALLY
GROCERY** LEADING IN
THE UK & US



**#2 GLOBALLY
TECHNOLOGY & ELECTRONICS**



**#3 GLOBALLY
FASHION & CLOTHING** LEADING
IN CHINA & FRANCE

70%



Consumers feel the least comfortable purchasing automobiles online, with only 7% of global respondents saying they would prefer to purchase online versus going to the physical store.





NEW
NORMAL,
NEW
HABITS

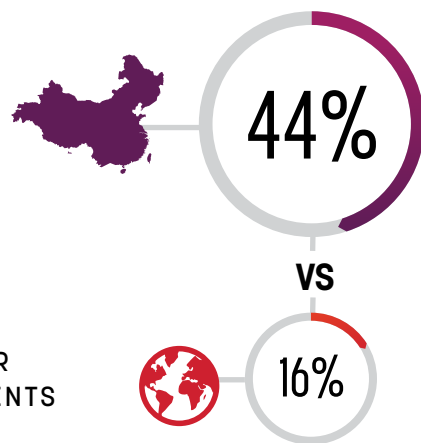
CONSUMERS APPRECIATE SOME OF THE NEW OFFERINGS & SERVICES INTRODUCED AS A RESULT OF THE PANDEMIC.



46%

Having to wear masks while shopping is what **bothers consumers the most across the globe (46%)**

While they most appreciate **hand sanitizers** at the entrance of stores **(38%)**.



Chinese consumers are by far the **most appreciative of shop assistants wearing masks - the number one measure they would like to continue to see adopted in stores post-pandemic (44% in China versus 16% elsewhere).**



33% of consumers globally have enjoyed Click and Collect/BOPIS and hope to continue to use this service moving forward. US consumers outpace this global average, with **38% of American respondents** declaring this intent.



Curbside pickup was also among the most appreciated by Americans, ranking third with **33% of US consumers** listing it versus the **global average of 19%.**



Chinese consumers expressed the greatest appreciation for innovative technologies that brands have introduced during the pandemic. **QR codes on all products to see in stores and then buy online (34% in China versus the 17% global average)** were the most popular.

OUR METHODOLOGY

About Censuswide

The research was conducted by Censuswide, with 8,012 respondents in the UK, US, France and China between 28th May - 01st June 2021.

Censuswide abides by and employs members of the Market Research Society which is based on the ESOMAR principles.

About Mood Media

Mood Media is the world's leading on-premise media solutions company dedicated to elevating the Customer Experience. We create greater emotional connections between brands and consumers through the right combination of Sight, Sound, Scent, Social and Systems solutions. We reach more than 150 million consumers each day through more than 500,000 subscriber locations in 100+ countries around the globe. Mood's clients include businesses of all sizes and market sectors, from the world's most recognized retailers and hotels to quick-service restaurants, local banks and thousands of small businesses. For more details: moodmedia.com.



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