

The background of the entire page is a blurred financial candlestick chart. The chart features white and red candlesticks against a dark background, with dashed white trend lines. A prominent green vertical bar is visible on the right side of the chart.

# THE STATE OF BRICK & MORTAR 2017

---

U.S. ISSUE

MOOD:





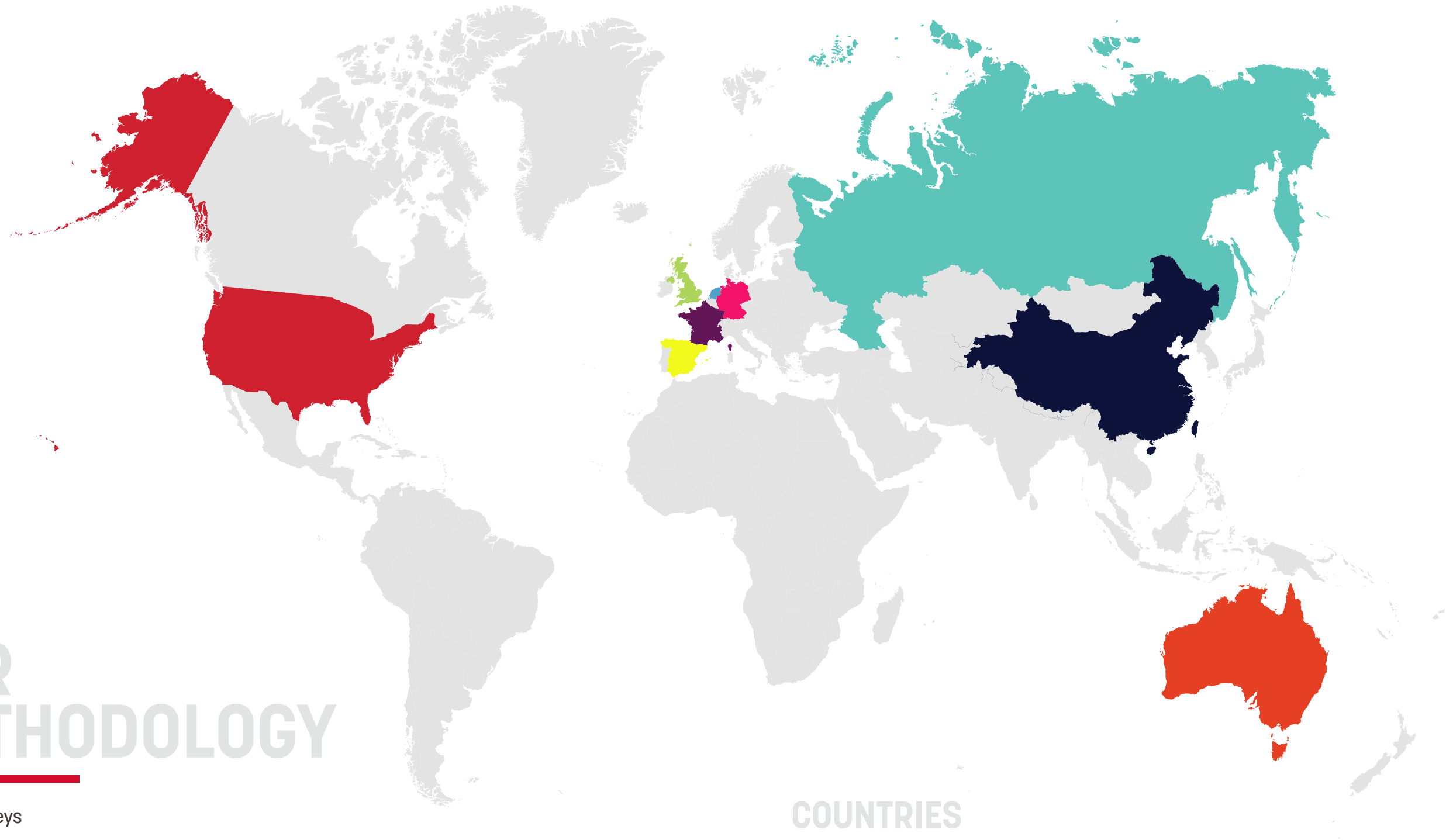
# THE EVOLUTION OF CUSTOMER EXPERIENCE

---

Mood Media recently conducted a quantitative study with over 11,000 consumers in 9 countries around the globe to better understand the evolution of in-store Customer Experience.

Even more specifically, we wanted to better understand why consumers might choose brick & mortar over online, what they most enjoy (and don't enjoy) about the in-store experience and what most motivates or influences them in the physical store.





# OUR METHODOLOGY

- + Online surveys
- + 11,255 consumers, 18+
- + Fieldwork undertaken 3/17 - 5/15
- + 51% female/49% male
- + Completed surveys by country

## COUNTRIES

- |                    |               |
|--------------------|---------------|
| + Australia 1003   | + Russia 1001 |
| + China 1006       | + Spain 1022  |
| + Germany 2027     | + UK 2000     |
| + France 1007      | + USA 1186    |
| + Netherlands 1003 |               |



# RESEARCH RESULTS

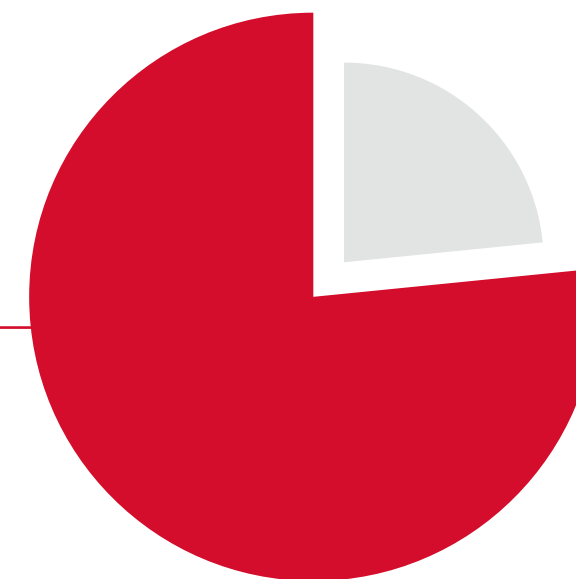
---



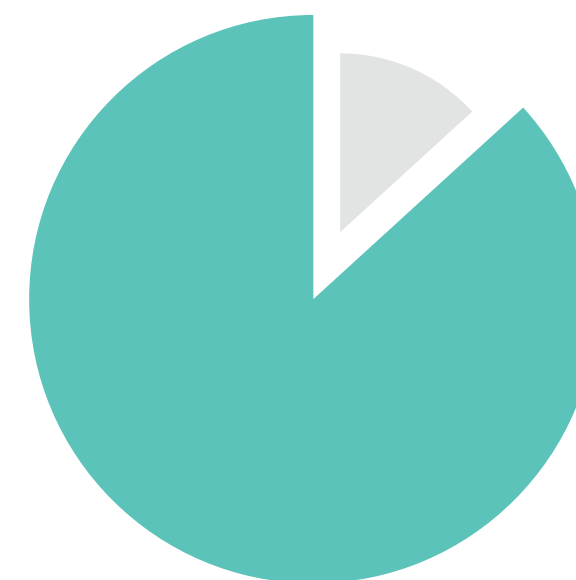
# 1 THE POWER OF EXPERIENCES

# 72%

of Americans cite the **ability to touch, feel and try** products as a top reason for shopping in-store



**78%** OF CONSUMERS GLOBALLY CITED THIS AS A TOP REASON, WITH RUSSIAN CONSUMERS MOST STRONGLY AGREEING AT **87%**







# WOMEN VALUE THE TACTILE NATURE A BIT MORE THAN MEN

**67%**

of U.S. men say the ability to touch, feel and try products is a top reason to shop in-store vs. online

**77%**

of U.S. women say the ability to touch, feel and try products is a top reason to shop in-store vs. online

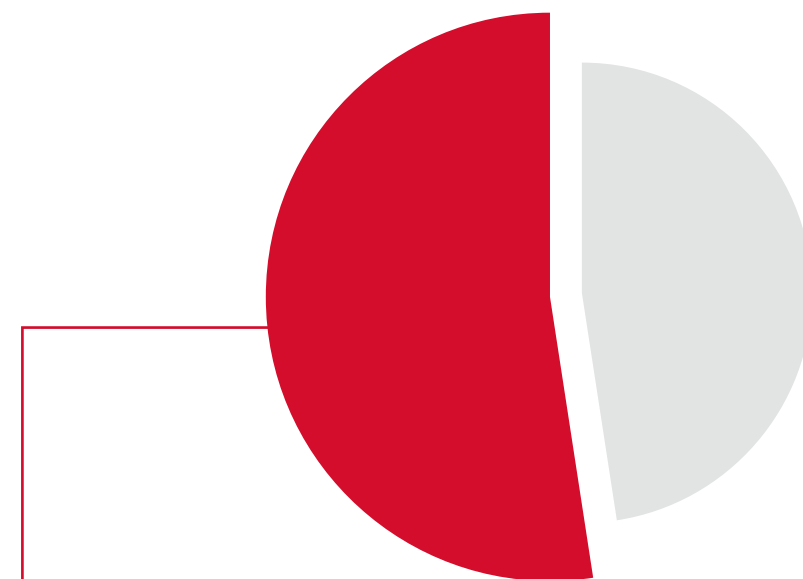




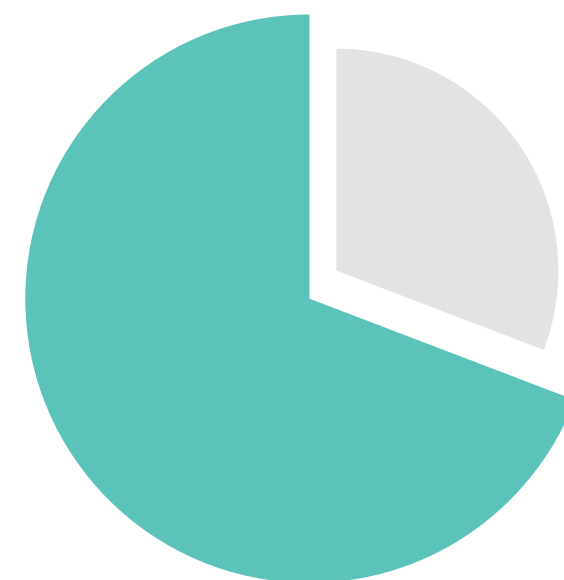
## 2 INSTANT GRATIFICATION MATTERS

66%

of Americans say the convenience of **getting it instantly** is a top reason for shopping in-store



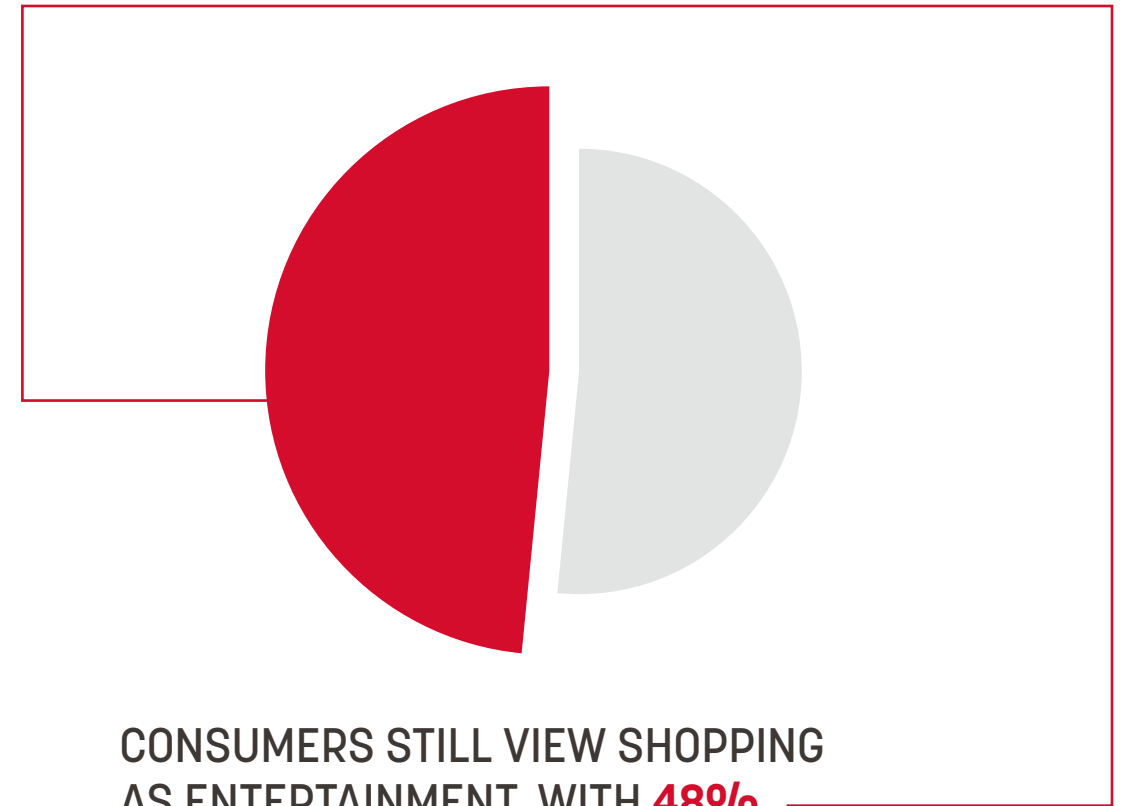
ALTHOUGH THE FRENCH WERE LESS EMPHATIC ABOUT THIS **(56%)** THAN RUSSIAN CONSUMERS **(67%)**, IN EVERY COUNTRY THIS WAS THE SECOND MOST CITED REASON FOR SHOPPING IN-STORE VS. ONLINE



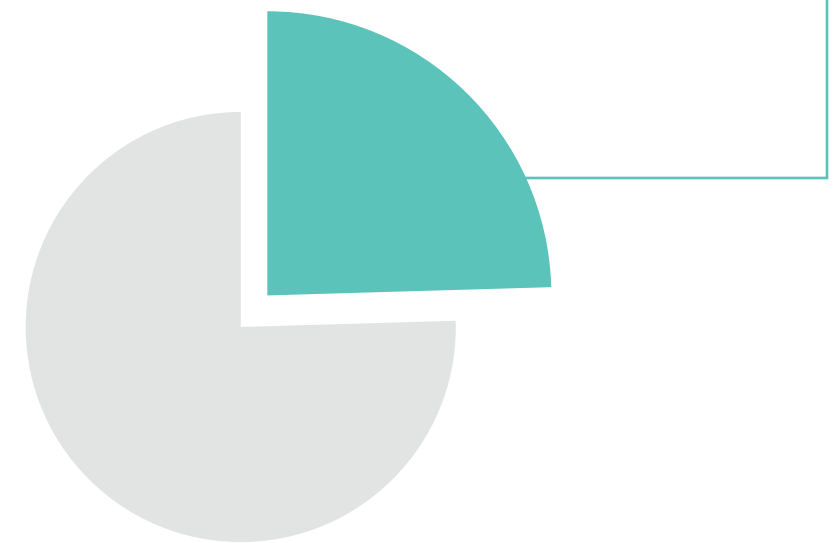
### 3 THE JOY OF DISCOVERY

# 480%

of U.S. consumers cite the ability to  
**browse and discover new things** as a  
top reason to shop brick & mortar



CONSUMERS STILL VIEW SHOPPING  
AS ENTERTAINMENT, WITH **48%**  
OF CONSUMERS GLOBALLY CITING  
DISCOVERY AS A TOP THREE DRIVER.  
THE ONLY EXCEPTION? CHINA (**21%**)








**CONSUMERS IN CHINA  
ROUND OUT THEIR TOP THREE  
REASONS FOR SHOPPING IN-  
STORE WITH THE IMPORTANCE  
OF "ATMOSPHERE AND  
EXPERIENCE" 39%**





260%

of U.S. shoppers list being able to  
**speak with a shop assistant** as one  
of their top reasons for choosing a  
store over online

## THE HUMAN TOUCH

---

While the brick & mortar world talks about the importance of bringing more online technology into the offline space, consumers point out that we can't forget the **value of store associates as well.**

Those who most agree?

The French and English at 32% each.



# THE HUMAN TOUCH BY AGE

The desire for human interaction in-store isn't limited to an older consumer segment

Being able to speak to a shop assistant is a top reason for shopping in a physical store rather than online (among U.S. consumers):

18-24 YEAR-OLDS

21%

25-34 YEAR-OLDS

25%

35-44 YEAR-OLDS

22%

45-54 YEAR-OLDS

23%

55+

30%



# ATMOSPHERE MATTERS



1IN5

CONSUMERS AROUND THE GLOBE CHOOSE TO  
SHOP IN-STORE VS ONLINE FOR THE ENJOYABLE  
ATMOSPHERE

...BUT ONLY 1 in 10 RUSSIANS



AND IN THE U.S., THOSE 18-24 CONSIDER  
"ATMOSPHERE & EXPERIENCE" TO BE  
MORE IMPORTANT THAN ANY OTHER AGE  
GROUP AS A TOP REASON TO CHOOSE  
SHOPPING IN-STORE VS. ONLINE

1IN3 (VS. 17% of ALL U.S. CUSTOMERS)





37%

The infographic features a circular gauge with a teal segment representing 37% of the circle. The background is a red-tinted photograph of people's hands and clothing, overlaid with a network of thin red lines and dots. The text '37%' is displayed in a large, teal, sans-serif font.

of U.S. consumers say that feeling in the **right mood** drives them to make **impulse purchases**



54%

The infographic features a circular gauge with a teal segment representing 54% of the circle. The background is a red-tinted photograph of people's hands and clothing, overlaid with a network of thin red lines and dots. The text '54%' is displayed in a large, teal, sans-serif font.

of U.S. consumers say that **discounts & promotions** drive them to make **impulse purchases**

# INFLUENCE ON IMPULSE SHOPPING



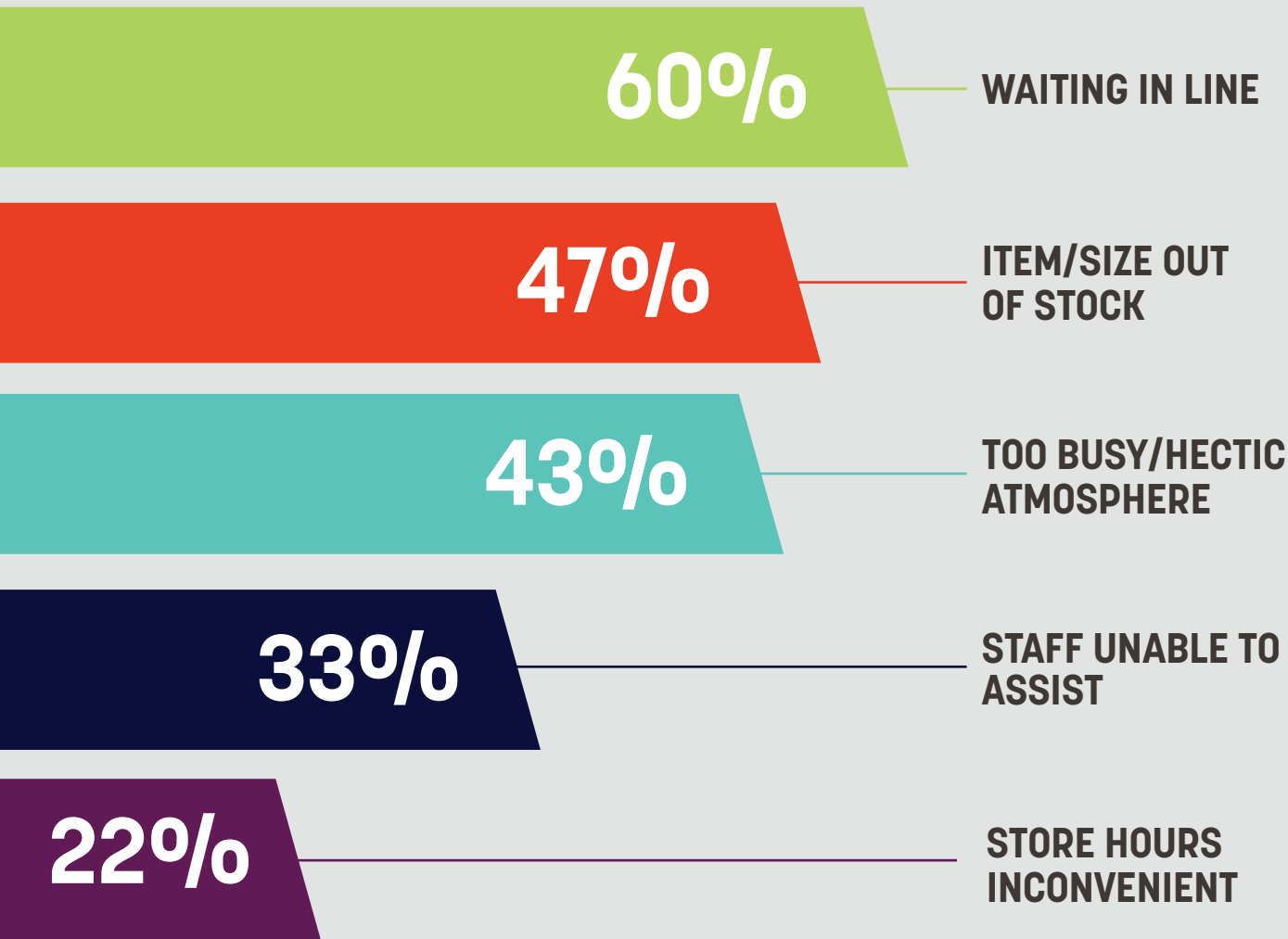
An aerial photograph of a city street, likely in Madrid, showing historic buildings with ornate facades and a prominent building with a black dome and gold accents. The sky is a mix of orange and blue, suggesting sunset or sunrise. A white network of lines and dots is overlaid on the entire image, creating a digital or data-driven aesthetic.

**THOSE MOST  
INFLUENCED BY  
DISCOUNTS AND  
PROMOTIONS  
WHEN MAKING  
AN UNPLANNED  
PURCHASE?**

**SPANIARDS AT  
72%**



# IN-STORE FRUSTRATIONS



**#1** **WAITING IN LINE** WAS THE TOP IN-STORE FRUSTRATION FOR U.S. SHOPPERS **(60%)**, PARTICULARLY OLDER SHOPPERS

**#2** ITEMS BEING **OUT OF STOCK** OR SIZES BEING OUT OF STOCK WAS THE SECOND MOST COMMON FRUSTRATION **(47%)**, PARTICULARLY AMONG YOUNGER SHOPPERS



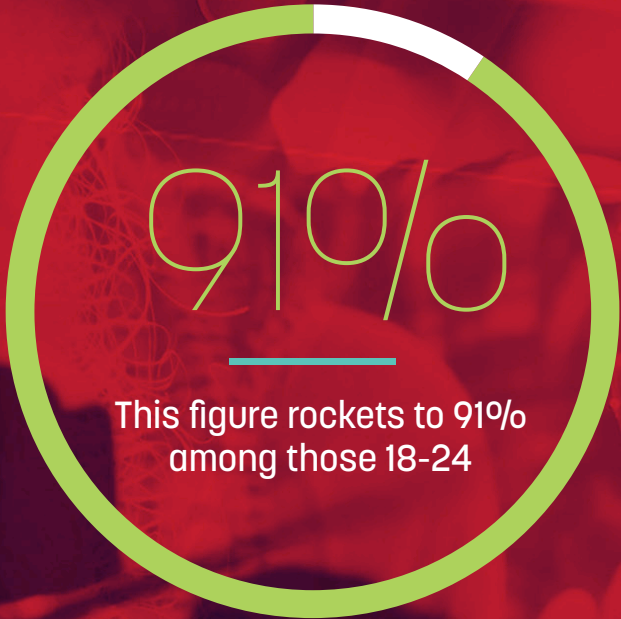
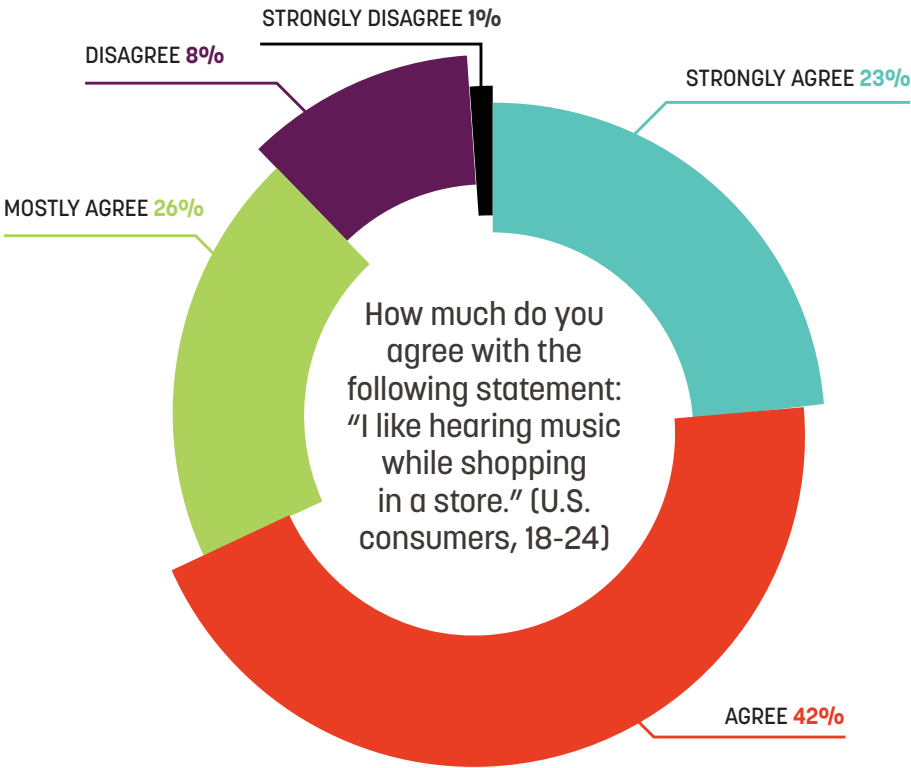




**FOR SPAIN  
(61%) & CHINA  
(55%), A STORE  
THAT FEELS  
"TOO BUSY" OR  
"TOO HECTIC"  
IS A TOP  
FRUSTRATION**



# MUSIC MAKES EVERYTHING BETTER





# 1 OUT OF 2

U.S. respondents (and almost 7 out of 10 Chinese and Russians) say hearing music in a store "makes you feel **more at ease**"

## MUSIC IS A CRUCIAL IN-STORE INGREDIENT

62%

THE DUTCH

52%

THE FRENCH

SAY MUSIC MAKES THE SHOPPING EXPERIENCE **MORE SOCIABLE**



# IF A STORE IS PLAYING MUSIC...

THE SHOPPING EXPERIENCE IS **MORE ENJOYABLE**



.....

MY MOOD IS **LIFTED**

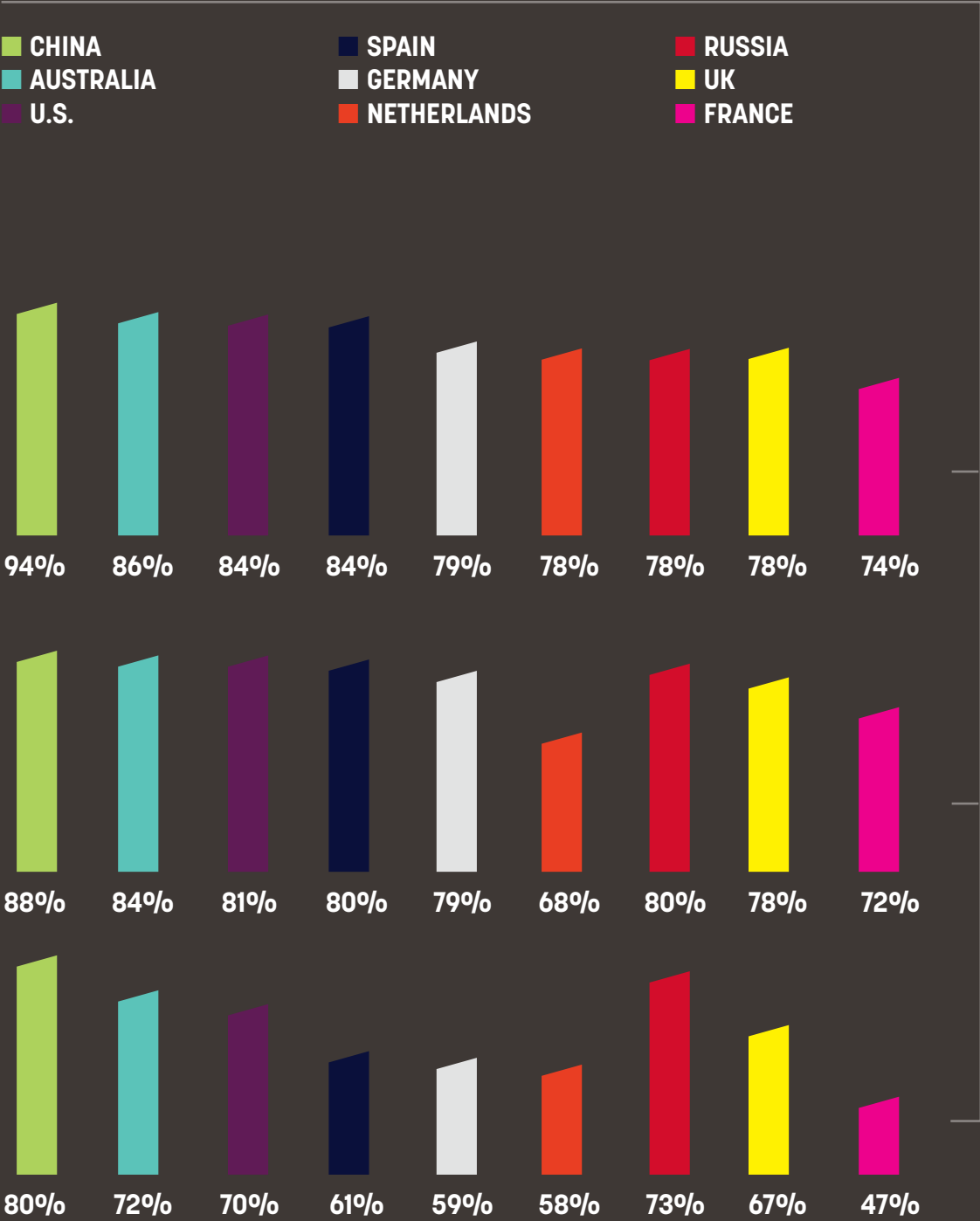


.....

I FEEL LIKE IT'S A BRAND I CAN **RELATE & CONNECT TO**



.....





# YOUNG SHOPPERS LIKE MUSIC EVEN MORE

U.S. CONSUMERS 18-24

88%

Music makes the shopping experience more enjoyable

86%

If a shop is playing music **my mood is lifted**

82%

If a shop is playing music, I feel like it's a brand I can relate and connect to



A close-up, warm-toned photograph of a woman with long brown hair, wearing a black beret and a nose ring. She is smiling broadly, showing her teeth, and her eyes are closed in a joyful expression. The background is blurred with warm, golden light, suggesting a concert or festival atmosphere.

HOW  
CONSUMERS  
DESCRIBE THEIR  
FEELINGS WHEN  
GOOD MUSIC IS  
PLAYING  
IN-STORE

WELCOME  
**RELAXED**  
HAPPY

MUSIC  
DRIVES  
MOOD

---

A close-up, cool-toned photograph of a man's face. He has dark hair and is looking directly at the camera with a serious, somewhat disengaged expression. The background is dark and out of focus.

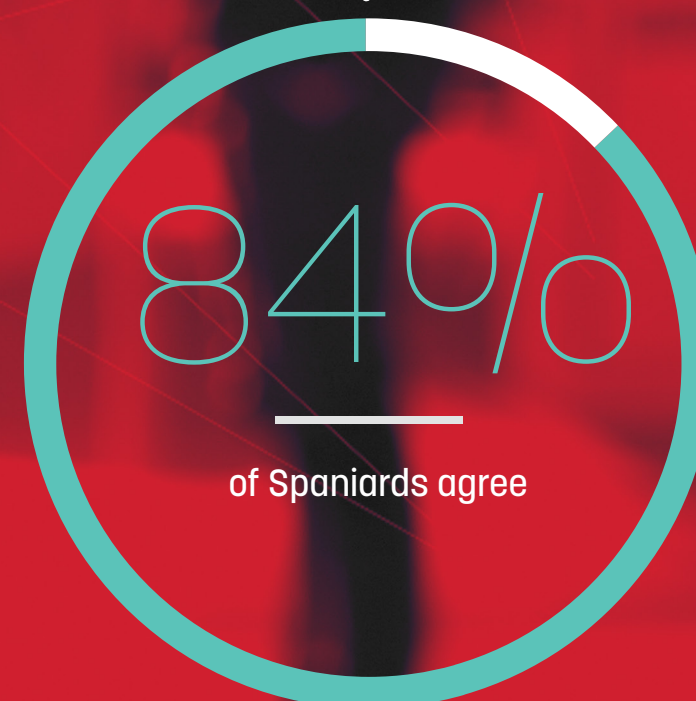
HOW  
CONSUMERS  
DESCRIBE THEIR  
FEELINGS WHEN  
NO MUSIC IS  
PLAYING  
IN-STORE

DISSAPPOINTED  
**DISENGAGED**  
UNWELCOME





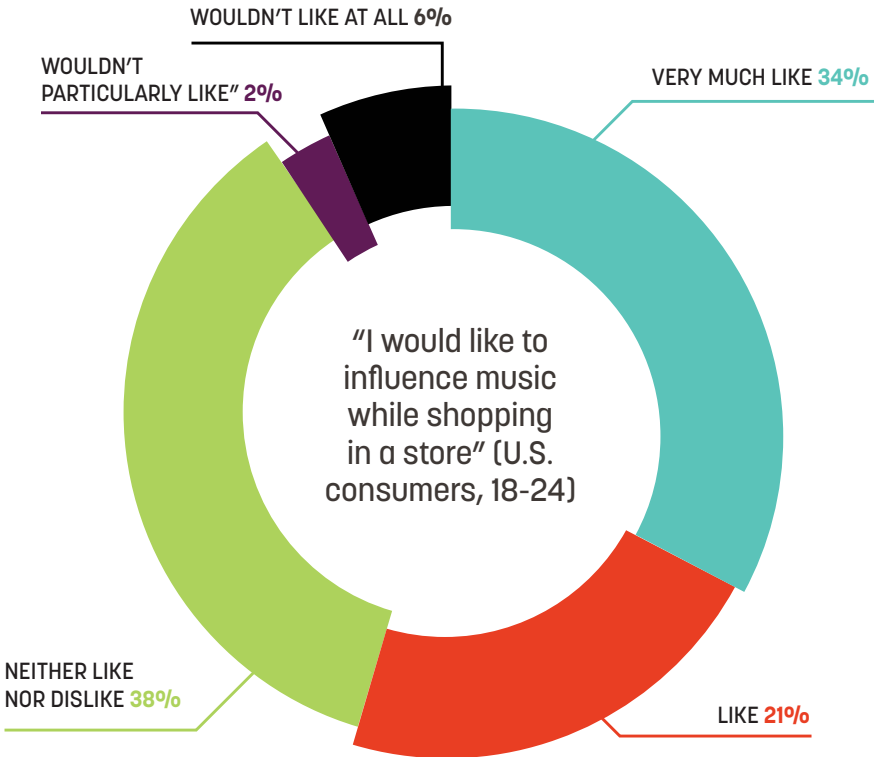
The total percent  
is fairly consistent  
(79%) across all  
countries, although  
China and Spain feel  
even more strongly  
about it:



# AND ABOUT THOSE PESKY LINES?



# CONSUMERS WANT TO BE PART OF THE IN-STORE EXPERIENCE





WHEN MUSIC IS  
PARTNERED WITH  
VISUALS & SCENT  
TO CREATE A  
BRANDED ATMOSPHERE

AMERICANS WHO  
SAY THEY'RE  
MORE LIKELY TO  
RE-VISIT



.....

AMERICANS WHO  
SAY THEY'RE  
MORE LIKELY TO  
RECOMMEND  
THE PLACE TO  
OTHERS



.....

AMERICANS WHO  
SAY THEY'RE  
MORE LIKELY TO  
STAY (& SHOP)  
LONGER



.....

THE IMPACT OF AN  
ENJOYABLE, BRANDED  
ATMOSPHERE GOES EVEN  
FURTHER WITH YOUNGER  
U.S. CONSUMERS

THOSE 18-24  
WHO ARE  
MORE LIKELY TO  
RE-VISIT



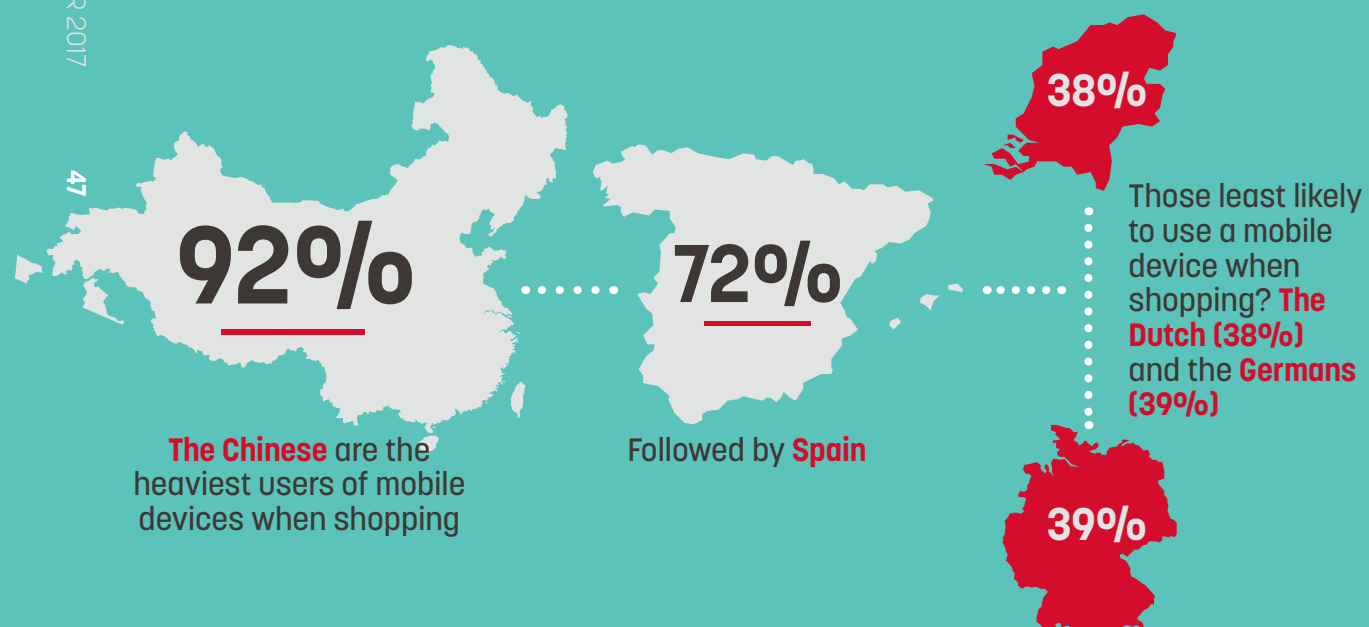
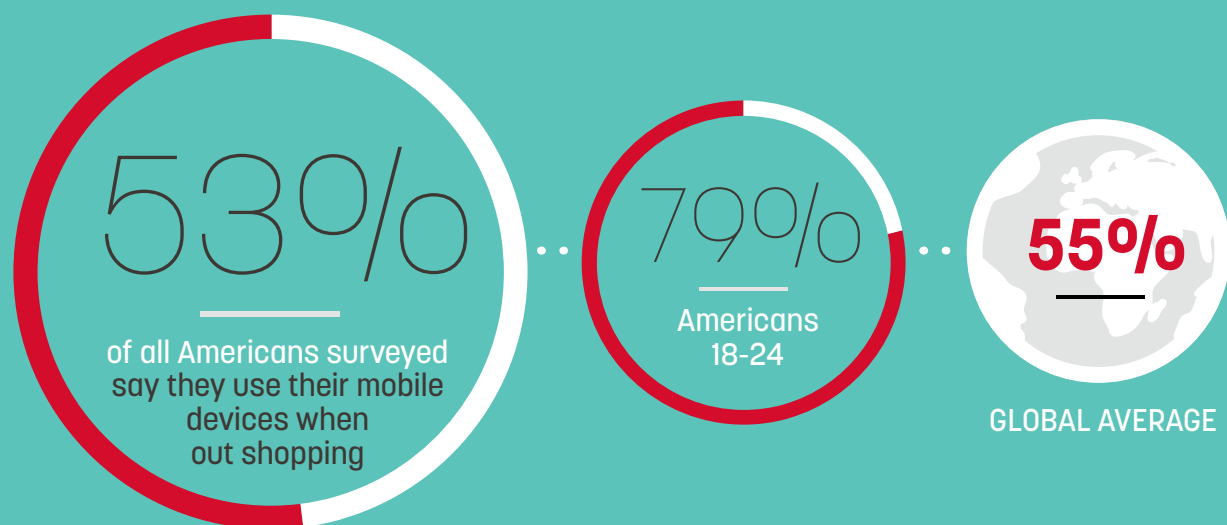
THOSE 18-24  
WHO ARE  
MORE LIKELY TO  
RECOMMEND  
THE PLACE TO  
OTHERS



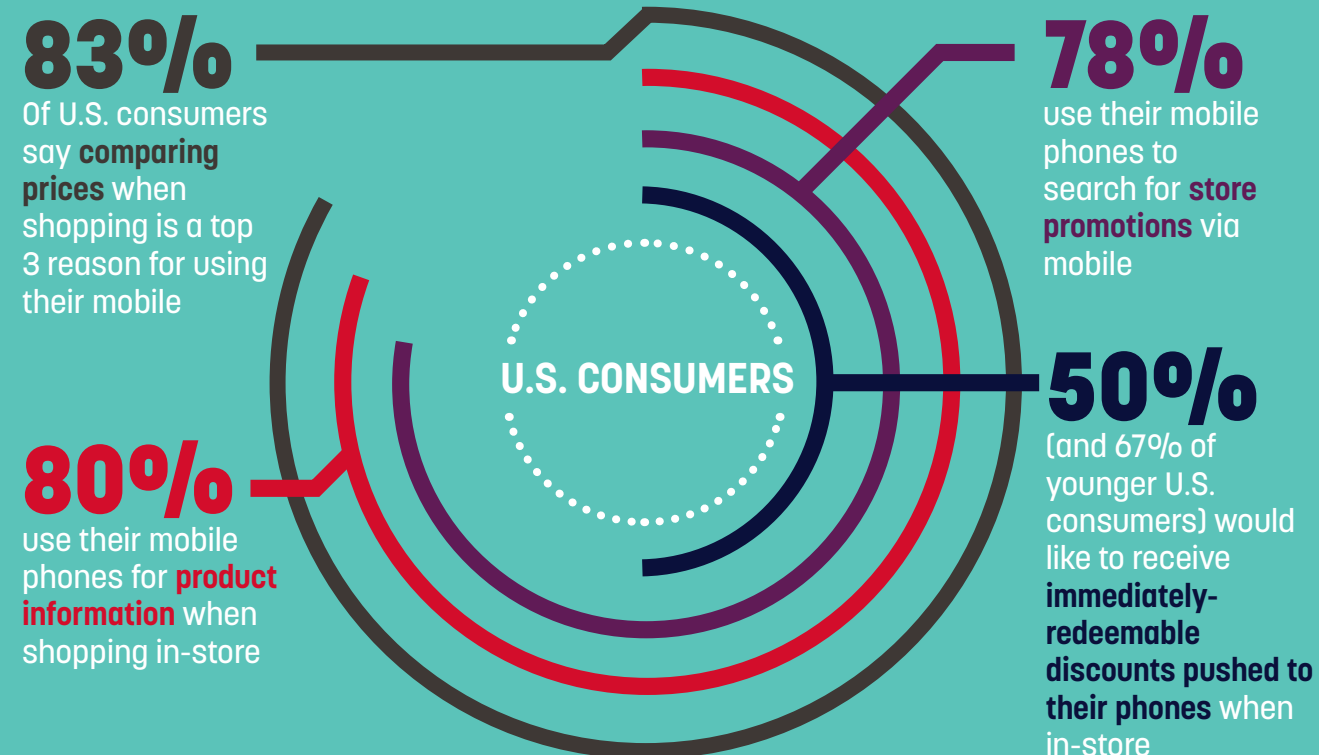
THOSE 18-24  
WHO ARE  
MORE LIKELY TO  
STAY (& SHOP)  
LONGER







OUR PHONES GO IN-STORE WITH US



MOBILE= SHOPPING TOOL



A man and a woman are shown in a workshop or laboratory setting. The man, on the left, is wearing a blue and white striped shirt and is looking down at something in his hands. The woman, on the right, is wearing a blue and white checkered shirt and is smiling. They are both holding tools, possibly pliers or wire cutters. The background is slightly blurred, showing what appears to be a workbench with various items on it. Overlaid on the image is a network diagram consisting of white dots connected by thin white lines, creating a web-like pattern across the entire scene.

**SO...WHAT DOES  
IT ALL MEAN?  
BRICK & MORTAR  
SHOPPERS AROUND  
THE WORLD EXPECT  
ELEVATED CUSTOMER  
EXPERIENCES.**

**WHEN YOU  
CHANGE  
THE MOOD,  
YOU CHANGE  
THE OUTCOME.**





800 345.5000 | [moodmedia.com](http://moodmedia.com)