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
- China 1006
- Germany 2027
- France 1007
- Netherlands 1003
- Russia 1001
- Spain 1022
- UK 2000
- USA 1186
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.
48% of U.S. consumers cite the ability to browse and discover new things as a top reason to shop brick & mortar.
CONSUMERS IN CHINA ROUND OUT THEIR TOP THREE REASONS FOR SHOPPING IN-STORE WITH THE IMPORTANCE OF “ATMOSPHERE AND EXPERIENCE” 39%
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 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

1 in 5 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 (vs. 17% of all U.S. customers)
37% of U.S. consumers say that feeling in the right mood drives them to make impulse purchases.

54% of U.S. consumers say that discounts & promotions drive them to make impulse purchases.

INFLUENCE ON IMPULSE SHOPPING
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.

- 60% Waiting in line
- 47% Item/size out of stock
- 43% Too busy/hectic atmosphere
- 33% Staff unable to assist
- 22% Store hours inconvenient
FOR SPAIN (61%) & CHINA (55%), A STORE THAT FEELS “TOO BUSY” OR “TOO HECTIC” IS A TOP FRUSTRATION.
MUSIC MAKES EVERYTHING BETTER

83% of Americans (and 78% of shoppers globally) say they like hearing music when shopping in-store.

This figure rockets to 91% among those 18-24.

How much do you agree with the following statement: “I like hearing music while shopping in a store.” (U.S. consumers, 18-24)

- MOSTLY AGREE 26%
- STRONGLY AGREE 23%
- AGREE 42%
- STRONGLY DISAGREE 1%
- DISAGREE 8%
- MOSTLY DISAGREE 20%
MUSIC IS A CRUCIAL IN-STORE INGREDIENT

U.S. respondents (and almost 7 out of 10 Chinese and Russians) say hearing music in a store “makes you feel more at ease”
IF A STORE IS PLAYING MUSIC...

THE SHOPPING EXPERIENCE IS **MORE ENJOYABLE**  
84% of Americans Agree

MY MOOD IS **LIFTED**  
81% of Americans Agree

I FEEL LIKE IT’S A BRAND I CAN **RELATE & CONNECT TO**  
70% of Americans Agree
YOUNG SHOPPERS LIKE MUSIC EVEN MORE

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

U.S. CONSUMERS 18-24

MOOD THE STATE OF BRICK & MORTAR 2017
How consumers describe their feelings when good music is playing in-store: Welcome, Relaxed, Happy

How consumers describe their feelings when no music is playing in-store: Dissapointed, Disengaged, Unwelcome

Music drives mood
AND ABOUT THOSE PESKY LINES?

77% of Americans say waiting in line is less dull if music is playing.

92% of all Chinese consumers surveyed say music eases waiting frustrations.

89% of Americans 18-24 Agree

84% of Spaniards agree

The total percent is fairly consistent (79%) across all countries, although China and Spain feel even more strongly about it.
CONSUMERS WANT TO BE PART OF THE IN-STORE EXPERIENCE

“I would like to influence music while shopping in a store” (U.S. consumers, 18-24)

46% of U.S. shoppers would like to influence music in-store

55% of U.S. shoppers 18-24

The least interested in participating?

The Russians at 31%
WHEN MUSIC IS PARTNERED WITH VISUALS & SCENT TO CREATE A BRANDED ATMOSPHERE

AMERICANS WHO SAY THEY'RE MORE LIKELY TO RE-VISIT
> 59%

AMERICANS WHO SAY THEY'RE MORE LIKELY TO RECOMMEND THE PLACE TO OTHERS
> 54%

AMERICANS WHO SAY THEY'RE MORE LIKELY TO STAY (& SHOP) LONGER
> 48%

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
> 72%

THOSE 18-24 WHO ARE MORE LIKELY TO RECOMMEND THE PLACE TO OTHERS
> 65%

THOSE 18-24 WHO ARE MORE LIKELY TO STAY (& SHOP) LONGER
> 60%
53% of all Americans surveyed say they use their mobile devices when out shopping.

79% of Americans 18-24.

55% of the global average.

92% of The Chinese are the heaviest users of mobile devices when shopping, followed by Spain at 72%.

38% of The Dutch (38%) and the Germans (39%) are the least likely to use a mobile device when shopping.

83% of U.S. consumers say comparing prices when shopping is a top 3 reason for using their mobile.

80% use their mobile phones for product information when shopping in-store.

U.S. CONSUMERS

78% use their mobile phones to search for store promotions via mobile.

50% (and 67% of younger U.S. consumers) would like to receive immediately-redeemable discounts pushed to their phones when in-store.

Food/Grocery & Clothing/Footwear are the two types of stores from which U.S. consumers would most like to receive redeemable promotions via mobile.

Those are also the top 2 preferred categories globally for mobile promotions interest.

77% of U.S. consumers say comparing prices when shopping is a top 3 reason for using their mobile.

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Our phones go in-store with us.

Mobile = Shopping tool.
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.