

THE STATE OF BRICK & MORTAR

U.S. ISSUE

MOOD:

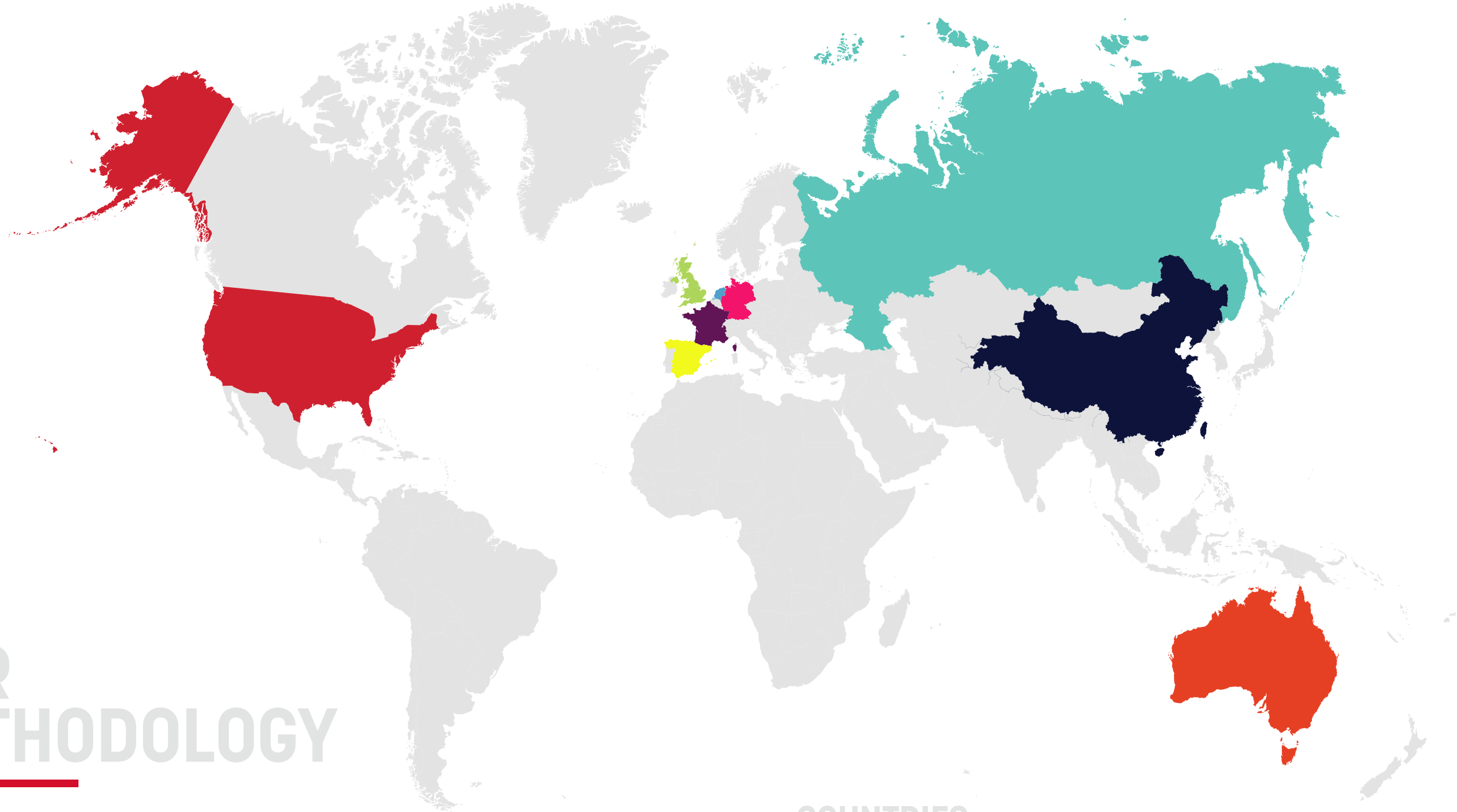


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THE EVOLUTION OF CUSTOMER EXPERIENCE

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%

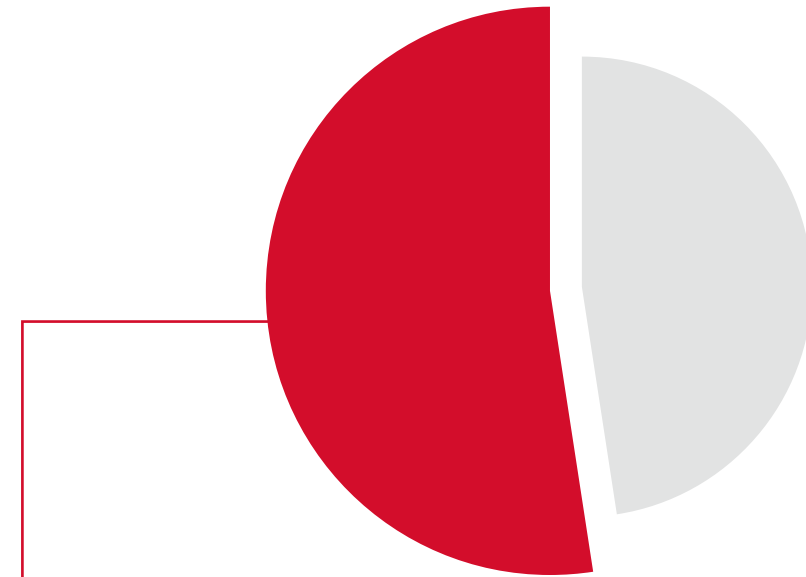
of U.S. women say the ability to touch, feel and try products is a top reason to shop in-store vs. online



2 INSTANT GRATIFICATION MATTERS

66%

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



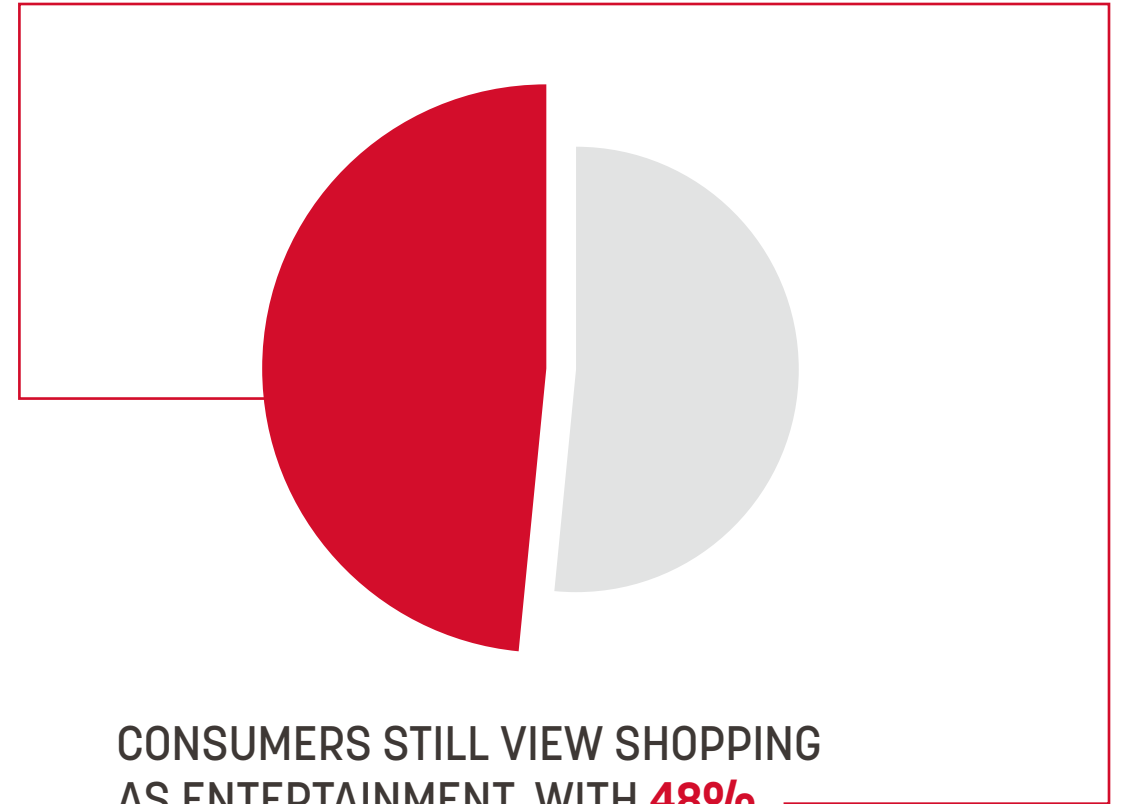
ALTHOUGH THE FRENCH WERE LESS EMPHATIC ABOUT THIS **(56%)** THAN RUSSIAN CONSUMERS **(67%)**, IN EVERY COUNTRY THIS WAS THE SECOND MOST CITED REASON FOR SHOPPING IN-STORE VS. ONLINE



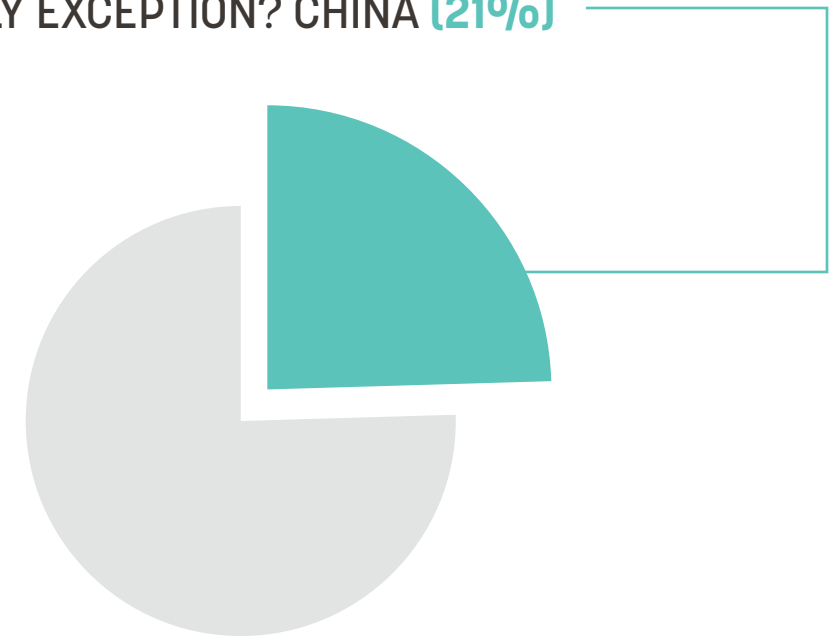
3 THE JOY OF DISCOVERY

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%**



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



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

1 IN 3 (VS. 17% OF ALL U.S. CUSTOMERS)



370%

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



540%

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

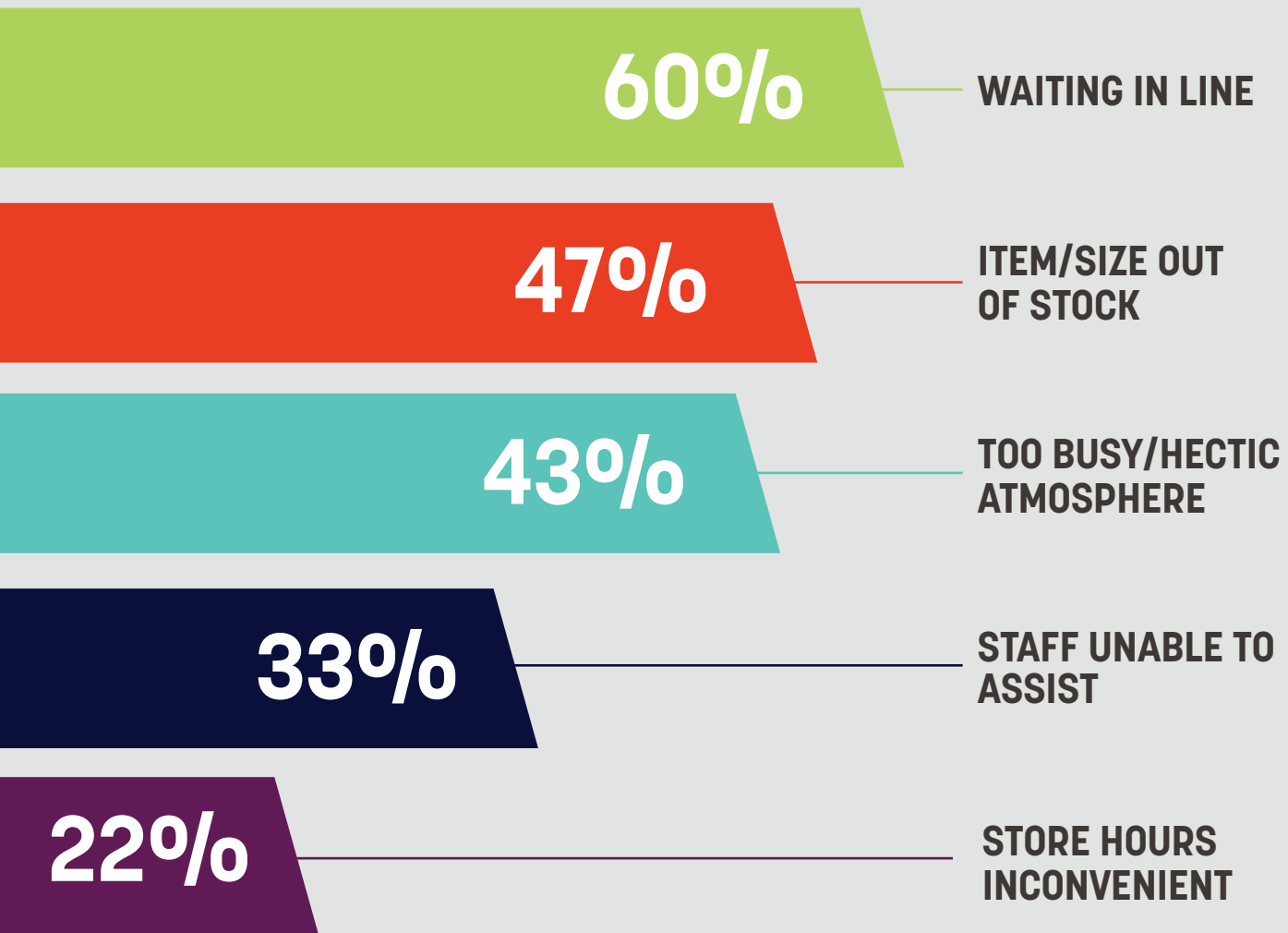
INFLUENCE ON IMPULSE SHOPPING

An aerial photograph of a city, likely Madrid, Spain, during sunset. The sky is filled with soft, golden light and scattered clouds. A network of white lines connects various points across the image, creating a digital or data network overlay. The city's architecture is visible, including a prominent building with a dark, ornate dome in the foreground. The overall mood is modern and data-driven.

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

**SPANIARDS AT
72%**

IN-STORE FRUSTRATIONS



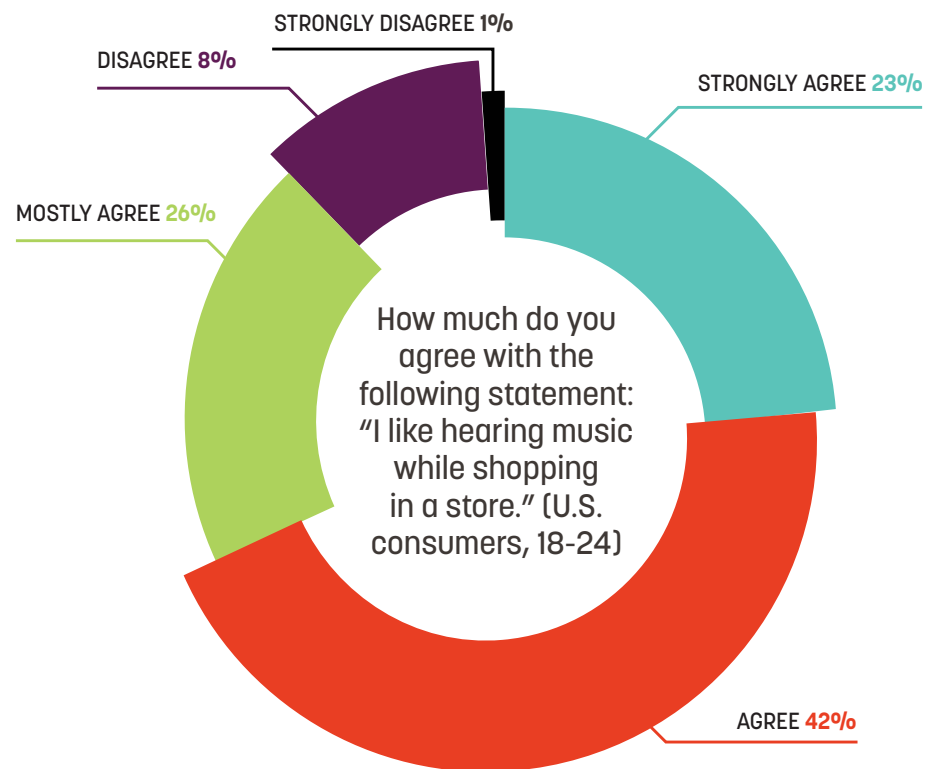
#1 **WAITING IN LINE** WAS THE TOP IN-STORE FRUSTRATION FOR U.S. SHOPPERS (60%), PARTICULARLY OLDER SHOPPERS

#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...

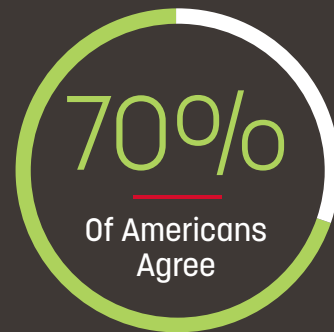
THE SHOPPING EXPERIENCE IS **MORE ENJOYABLE**



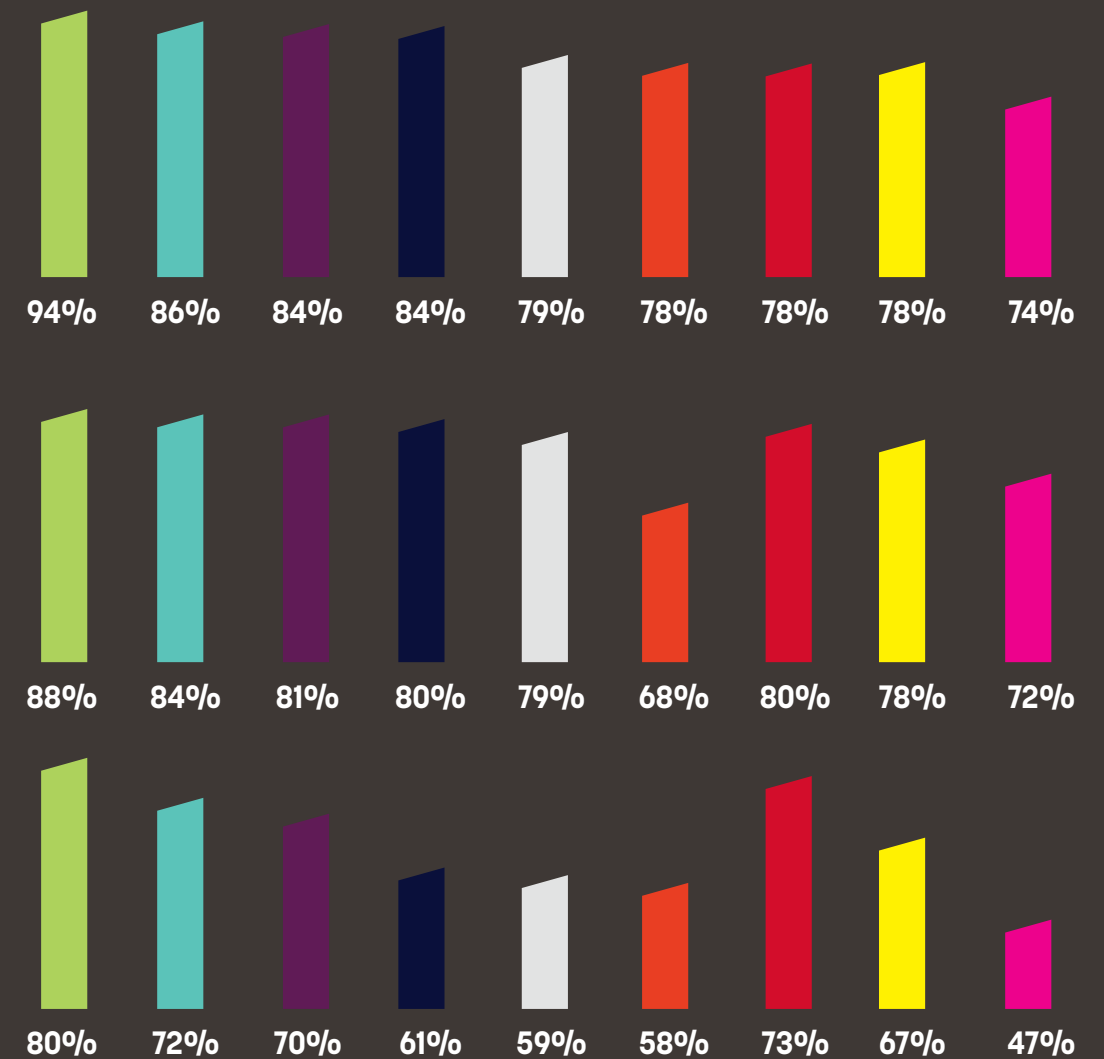
MY MOOD IS **LIFTED**



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



- CHINA
- AUSTRALIA
- U.S.
- SPAIN
- GERMANY
- NETHERLANDS
- RUSSIA
- UK
- FRANCE



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



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

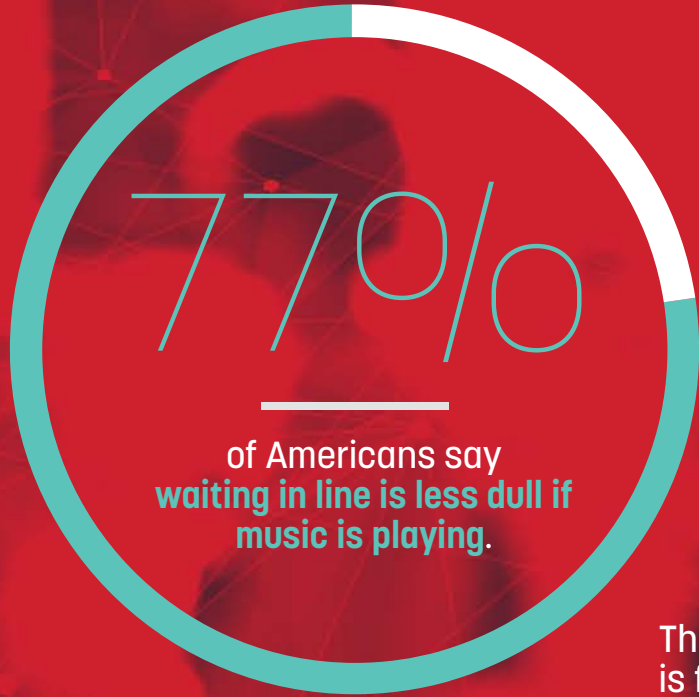
WELCOME
RELAXED
HAPPY

MUSIC
DRIVES
MOOD



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

DISSAPPOINTED
DISENGAGED
UNWELCOME

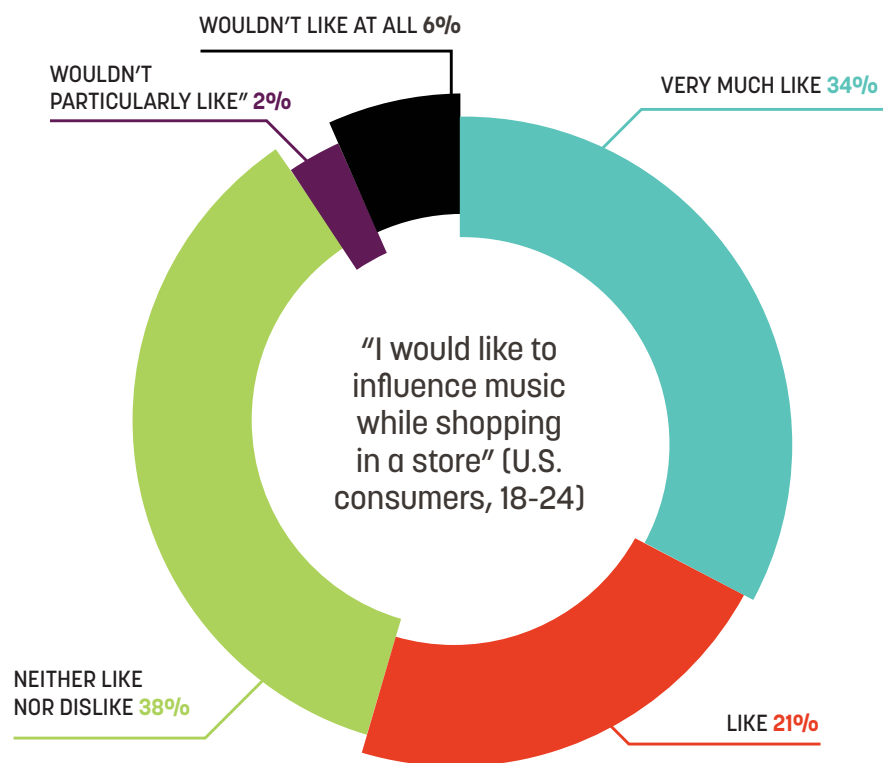


The total percent is fairly consistent (79%) across all countries, although China and Spain feel even more strongly about it:



AND ABOUT THOSE PESKY LINES?

CONSUMERS WANT TO BE PART OF THE IN-STORE EXPERIENCE



The least interested in participating?



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

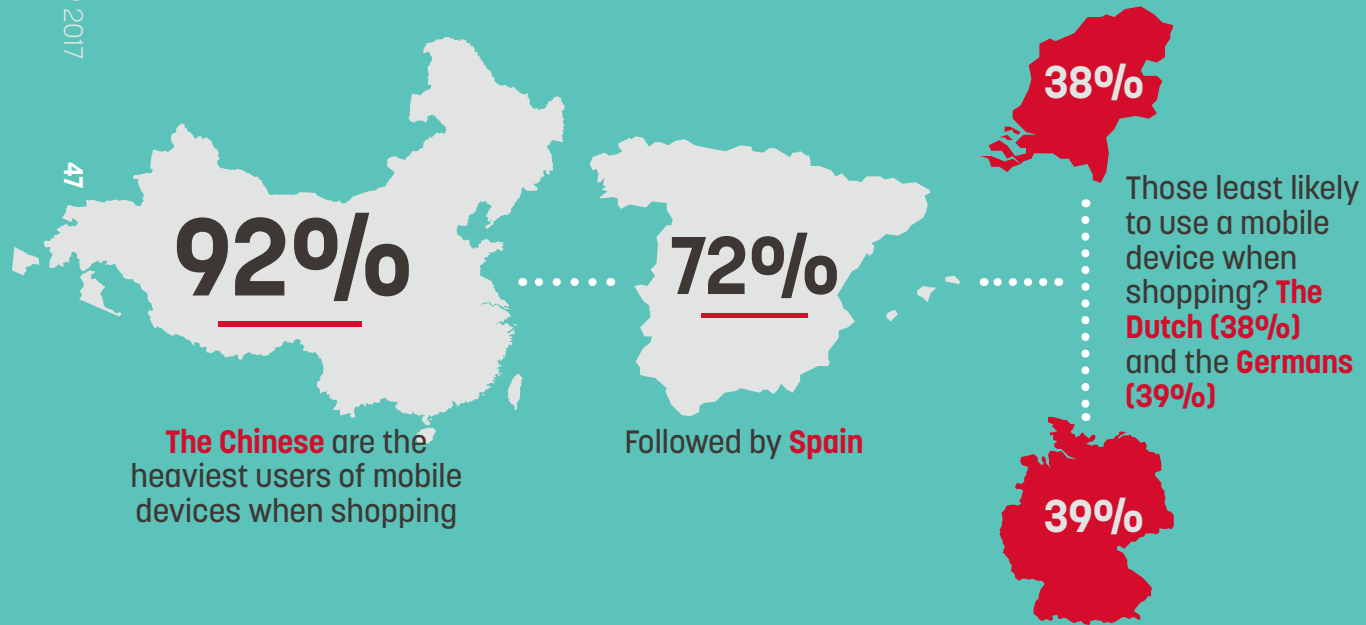
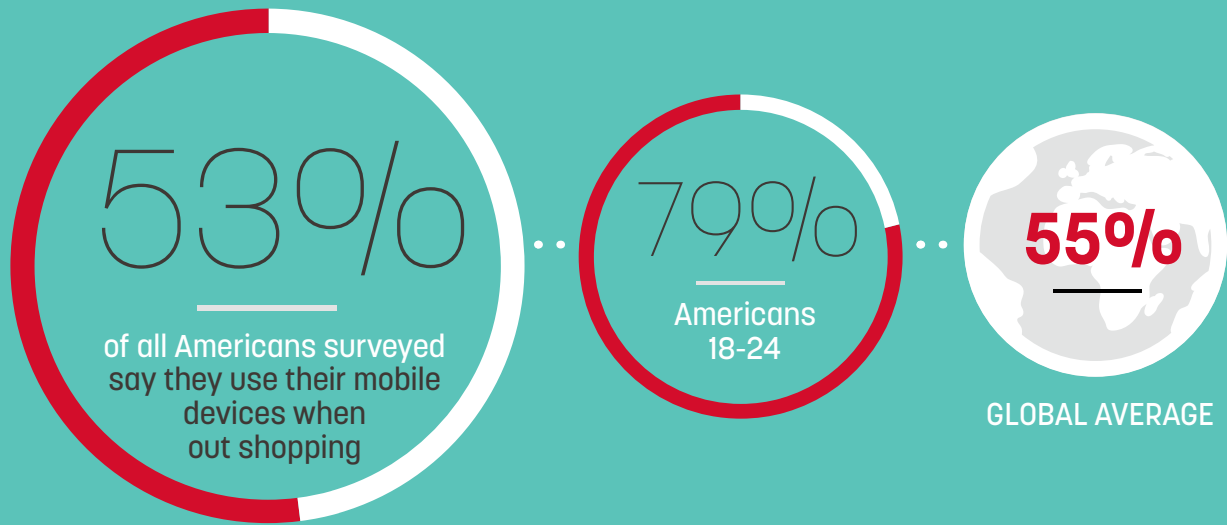


THOSE 18-24 WHO ARE MORE LIKELY TO RECOMMEND THE PLACE TO OTHERS

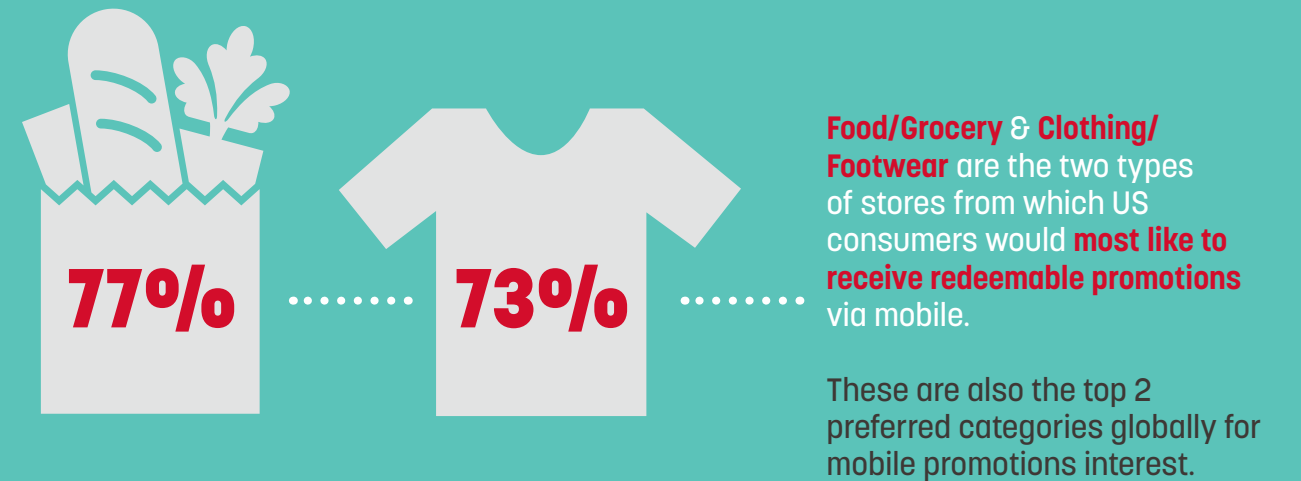
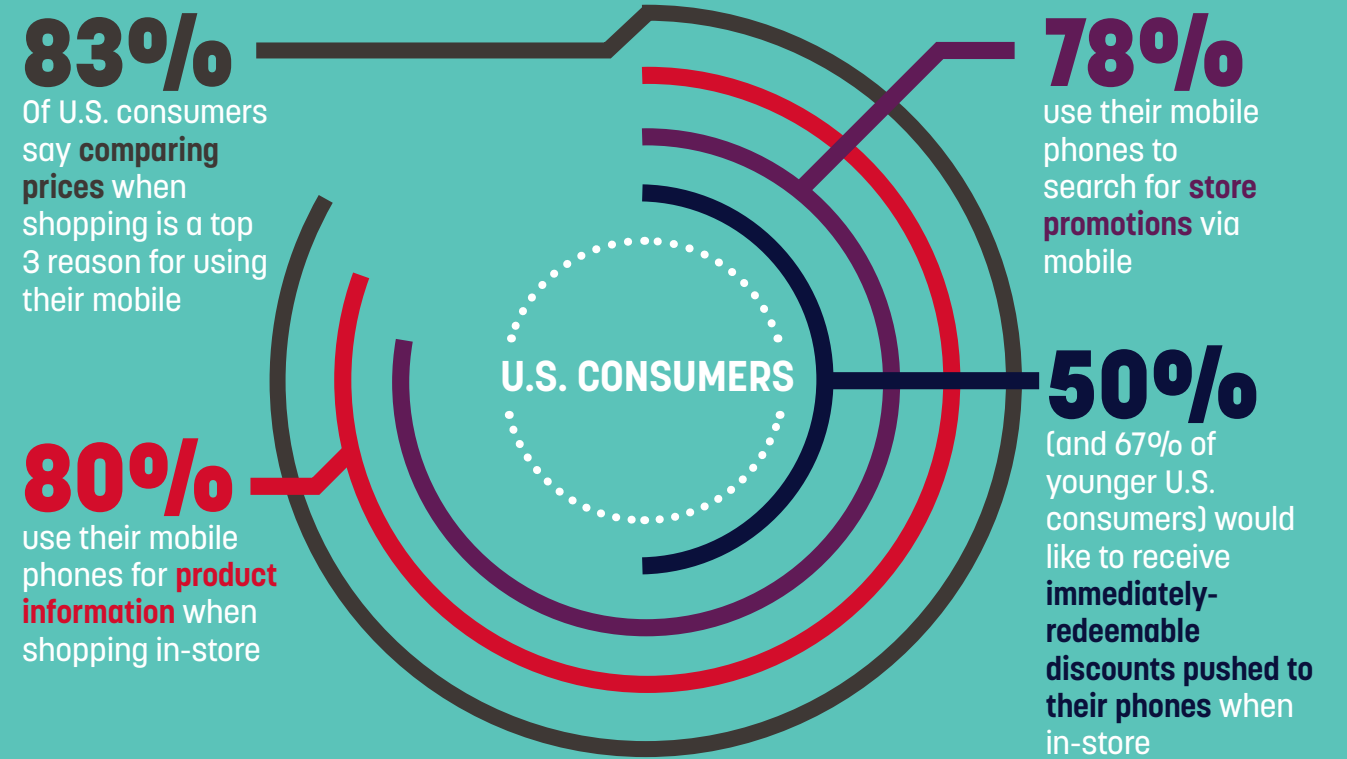


THOSE 18-24 WHO ARE MORE LIKELY TO STAY (& SHOP) LONGER





OUR PHONES GO IN-STORE WITH US



MOBILE= SHOPPING TOOL



**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.**



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