

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 lines representing trend lines. The overall aesthetic is high-tech and data-driven.

THE STATE OF BRICK & MORTAR 2017

U.S. ISSUE

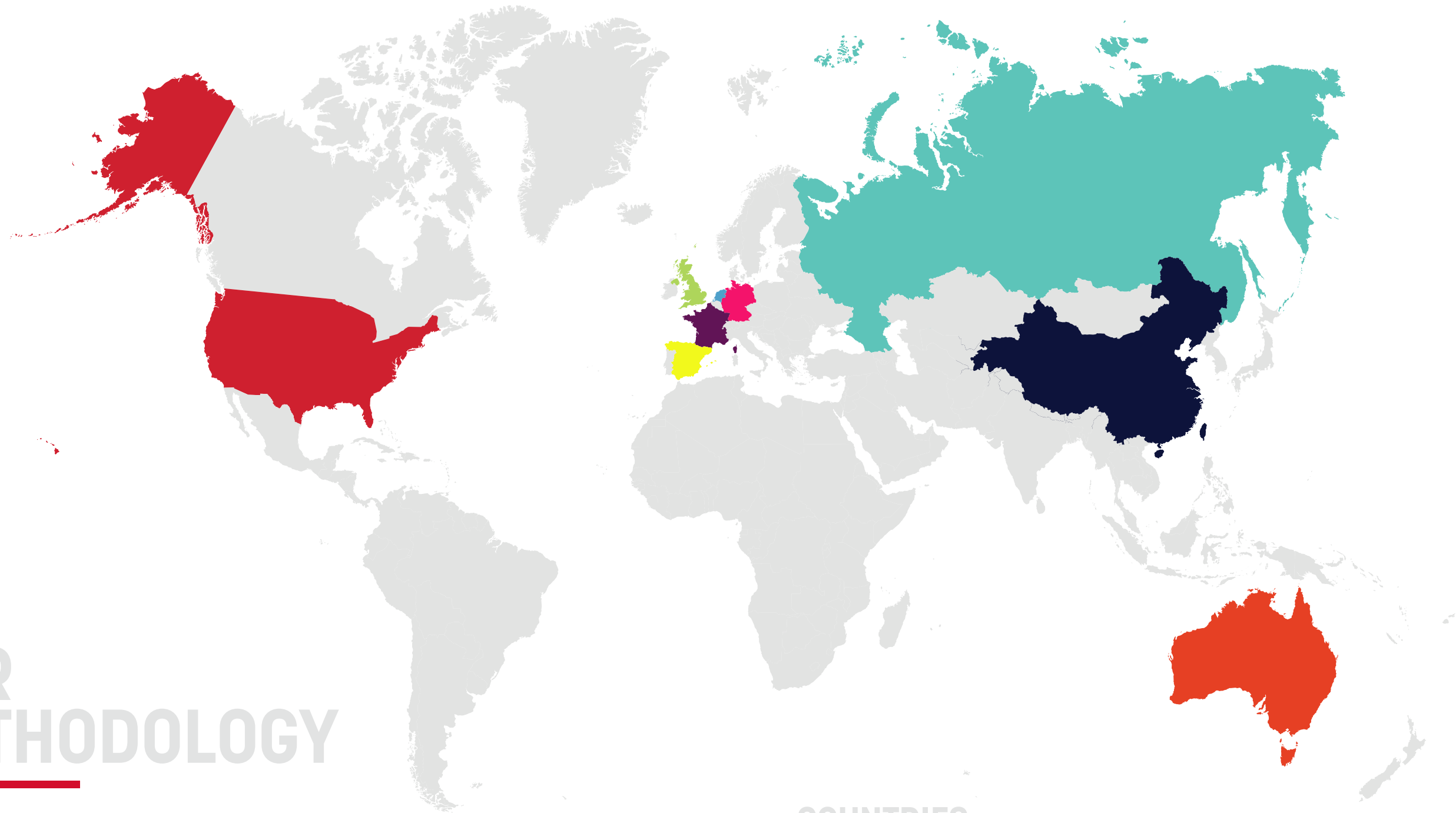
MOOD:



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

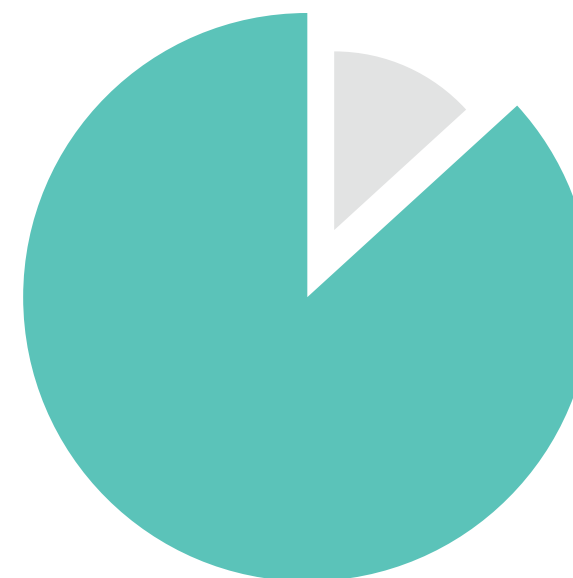
1 THE POWER OF EXPERIENCES

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%**



A man with a long, dark beard and blue eyes is smiling on the left side of the image. On the right side, a woman with brown hair is smiling broadly. The background is split into a dark blue section on the left and a light grey section on the right.

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

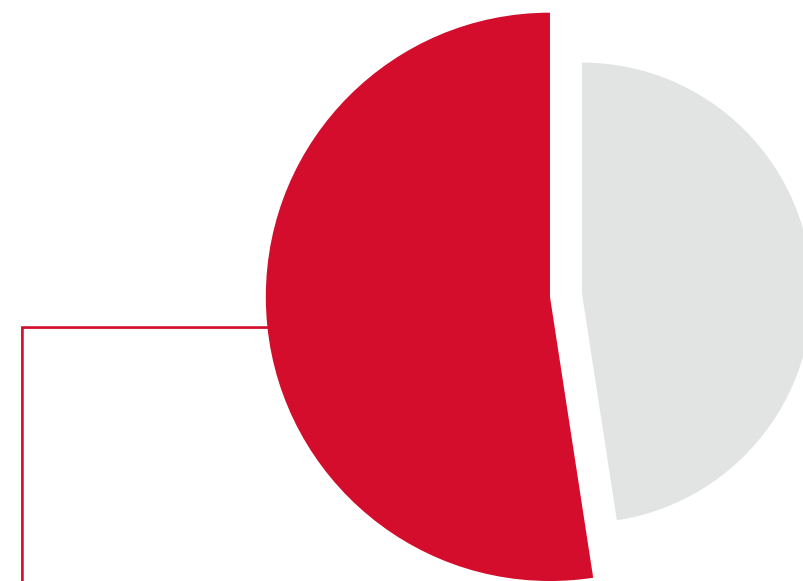
77%

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

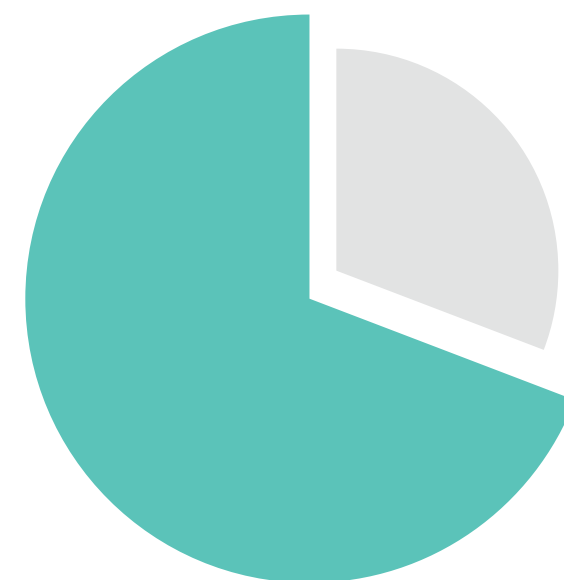
2 INSTANT GRATIFICATION MATTERS

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

48%

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%**



26%

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%

A circular gauge with a teal segment representing 37% of the circle. The background is a red-tinted image of people's hands and shopping bags, overlaid with a network of white lines and dots.

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



54%

A circular gauge with a teal segment representing 54% of the circle. The background is a red-tinted image of people's hands and shopping bags, overlaid with a network of white lines and dots.

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

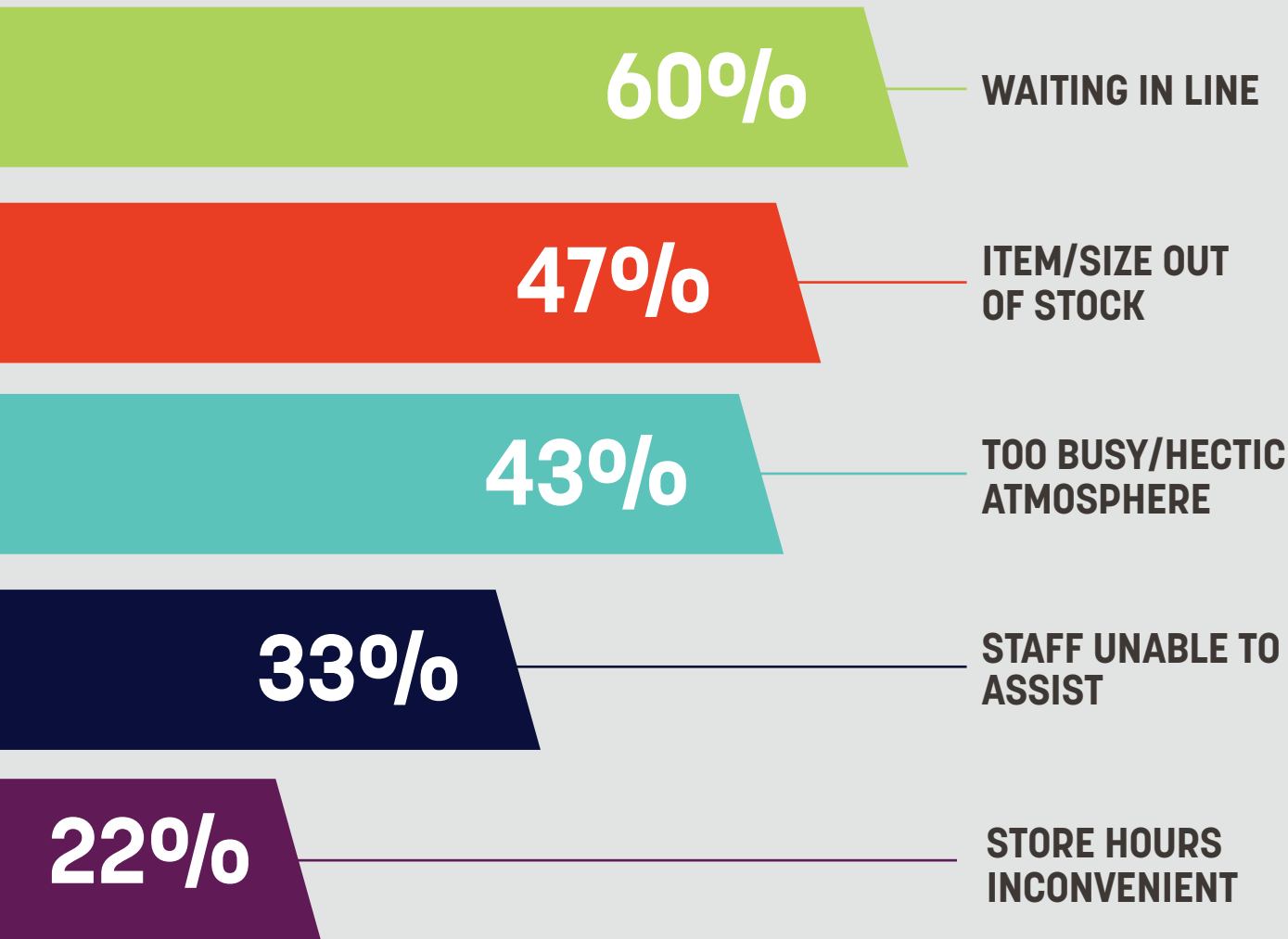
INFLUENCE ON IMPULSE SHOPPING

An aerial photograph of a city street, likely in Madrid, showing historic buildings with ornate facades and a prominent dome. The image is overlaid with a network of white lines and dots, suggesting a digital or data theme. The text is centered in a large, bold, white font on a dark purple background.

**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

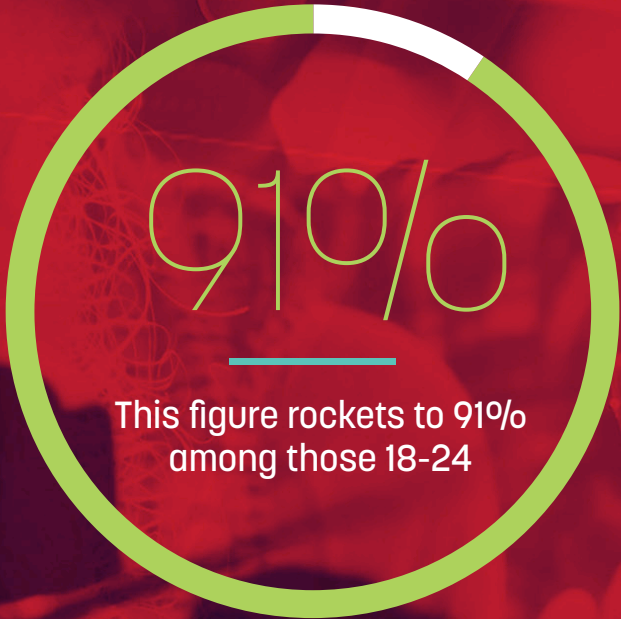
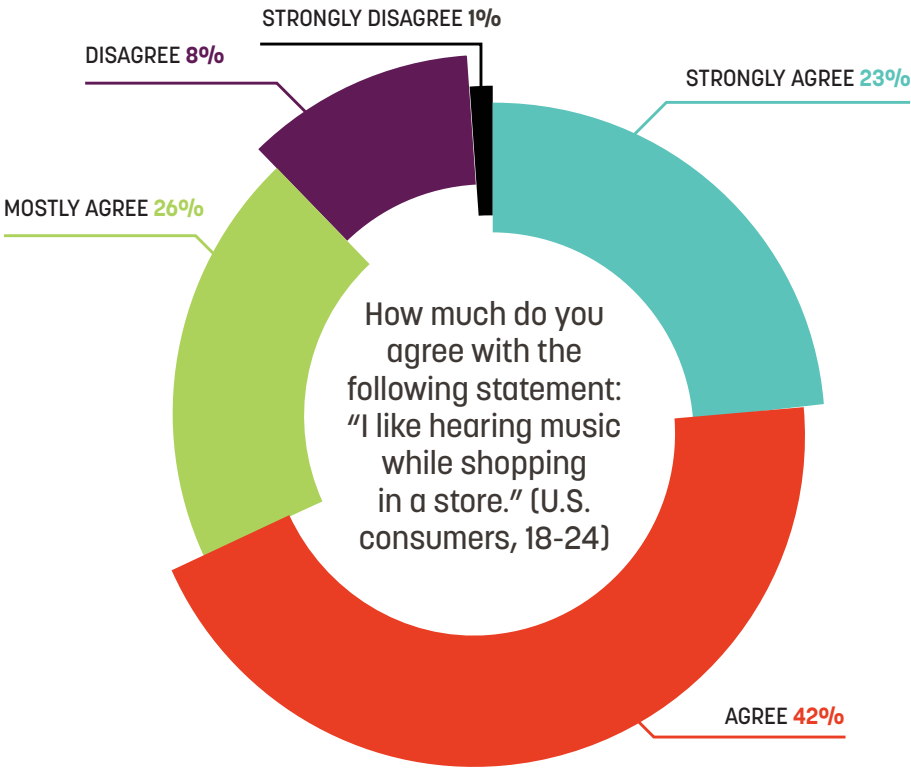
#2 ITEMS BEING **OUT OF STOCK** OR SIZES BEING OUT OF STOCK WAS THE SECOND MOST COMMON FRUSTRATION (47%), PARTICULARLY AMONG YOUNGER SHOPPERS





**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**

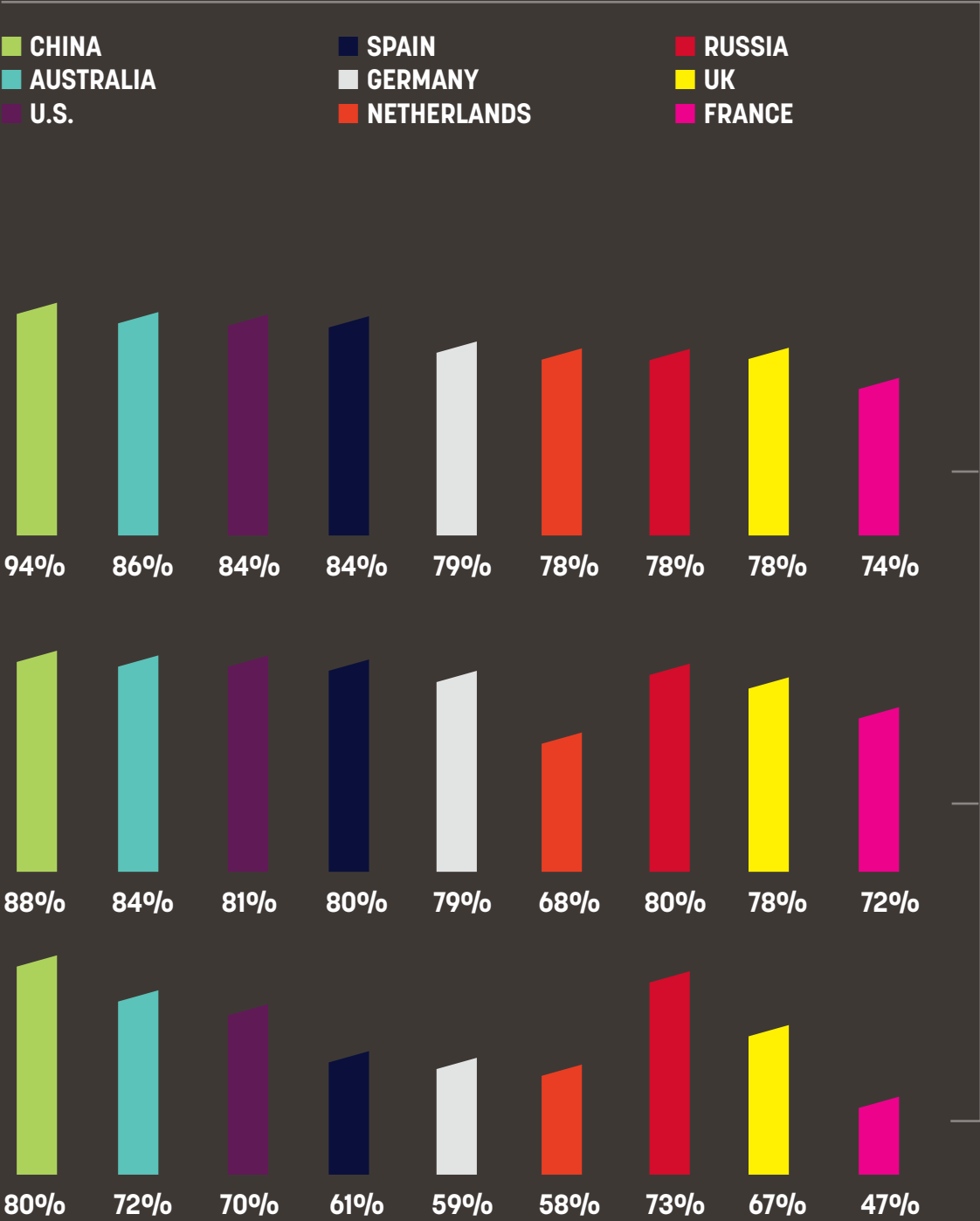


.....

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

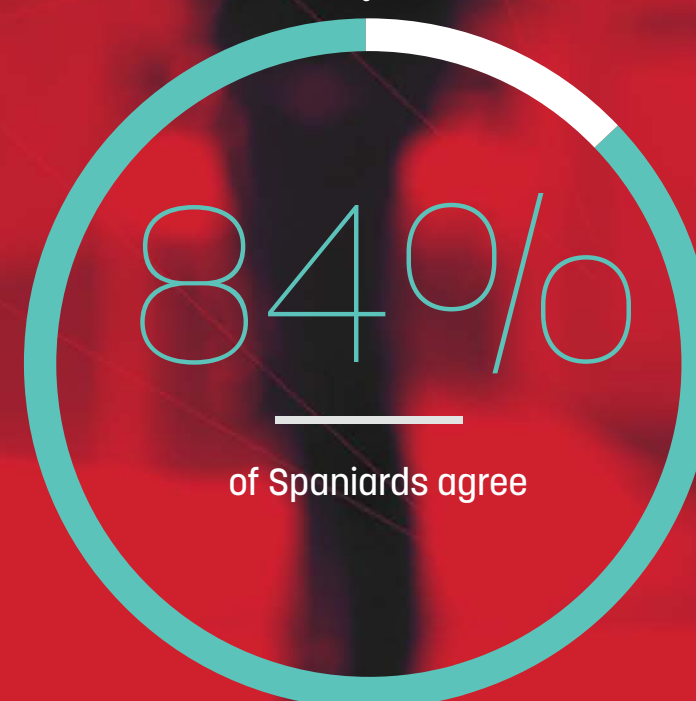
A close-up, cool-toned photograph of a man's face. He has dark hair and is looking directly at the camera with a neutral, somewhat disengaged expression. The background is dark and out of focus.

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

DISSAPPOINTED
DISENGAGED
UNWELCOME

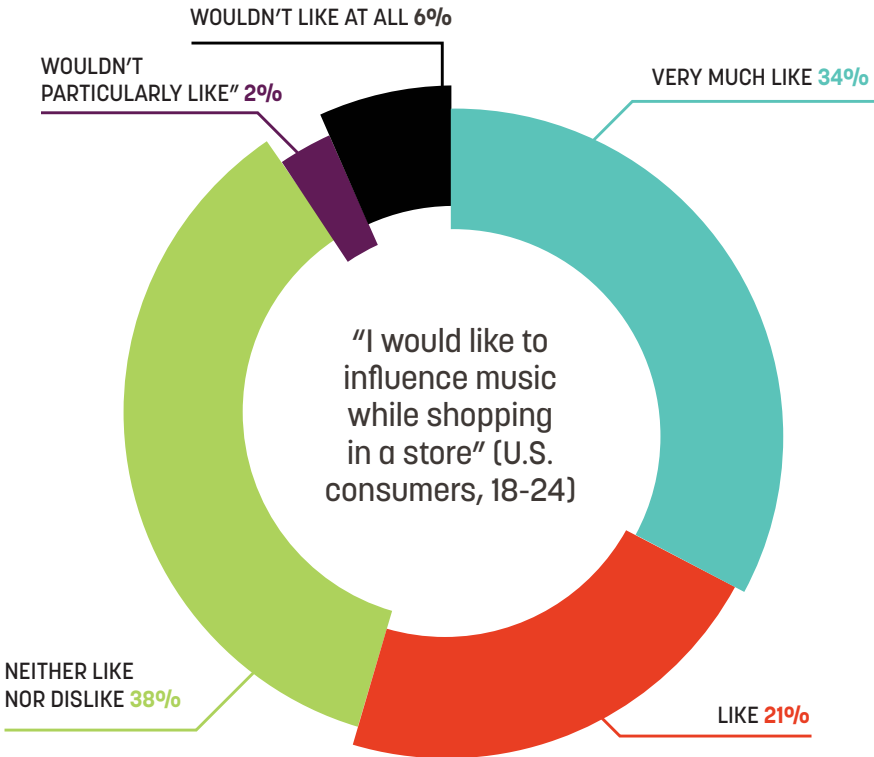


The total percent
is fairly consistent
(79%) across all
countries, although
China and Spain feel
even more strongly
about it:



**AND ABOUT
THOSE PESKY
LINES?**

CONSUMERS WANT TO BE PART OF THE IN-STORE EXPERIENCE



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

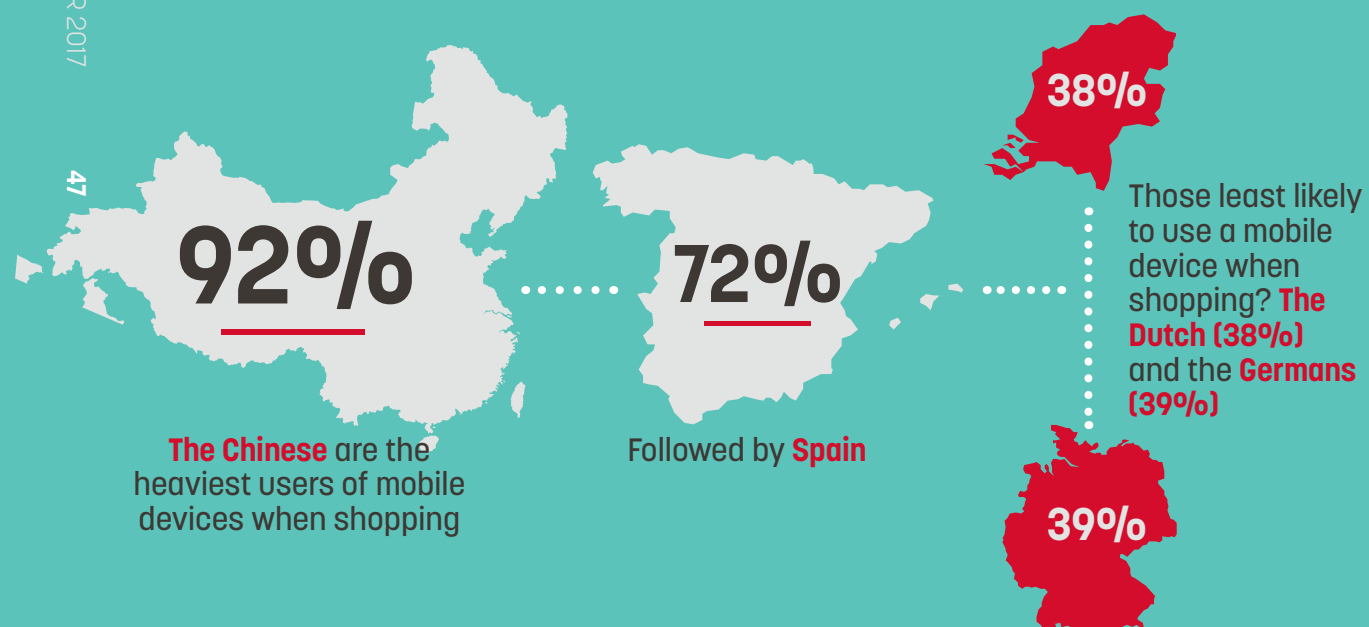
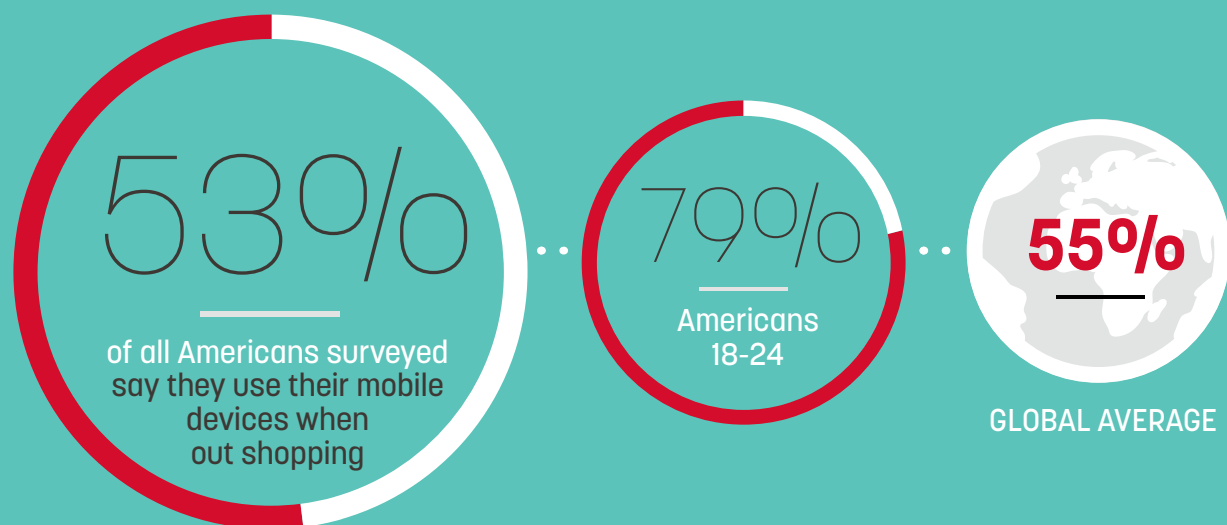


THOSE 18-24
WHO ARE
MORE LIKELY TO
RECOMMEND
THE PLACE TO
OTHERS

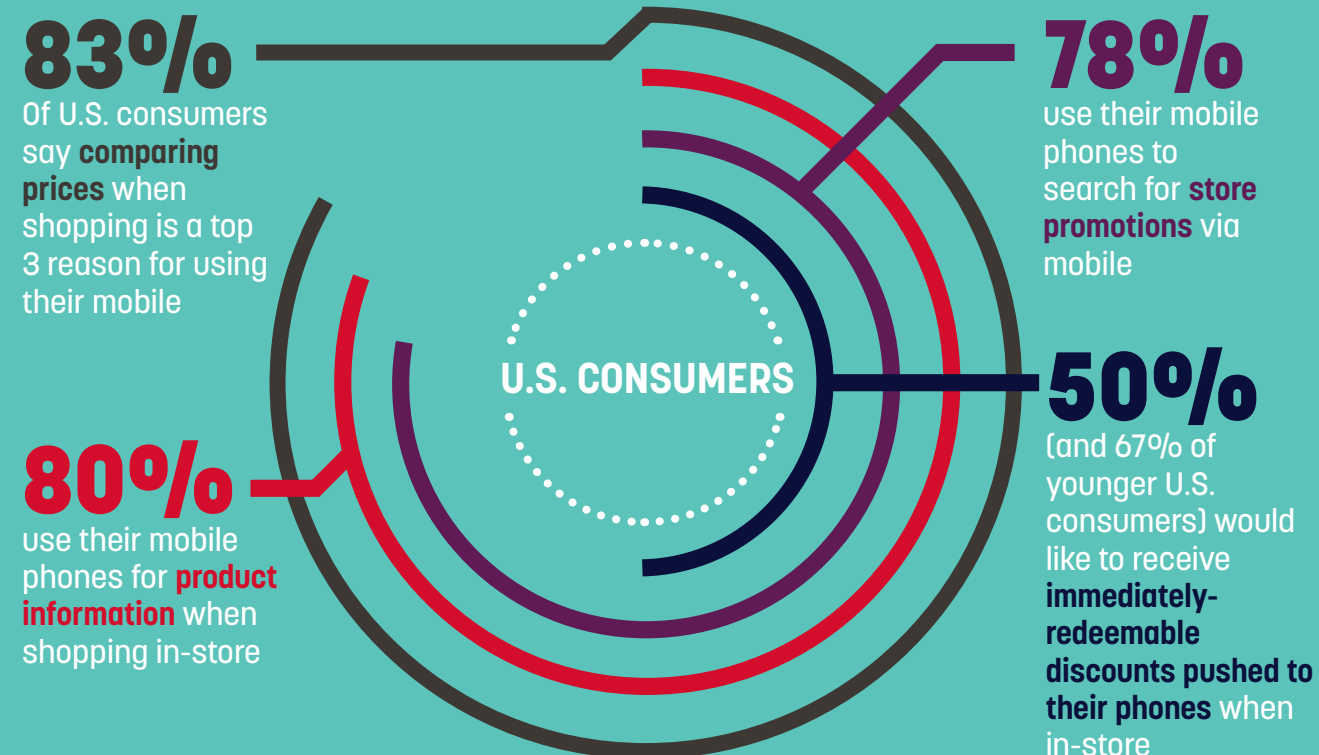


THOSE 18-24
WHO ARE
MORE LIKELY TO
STAY (& SHOP)
LONGER

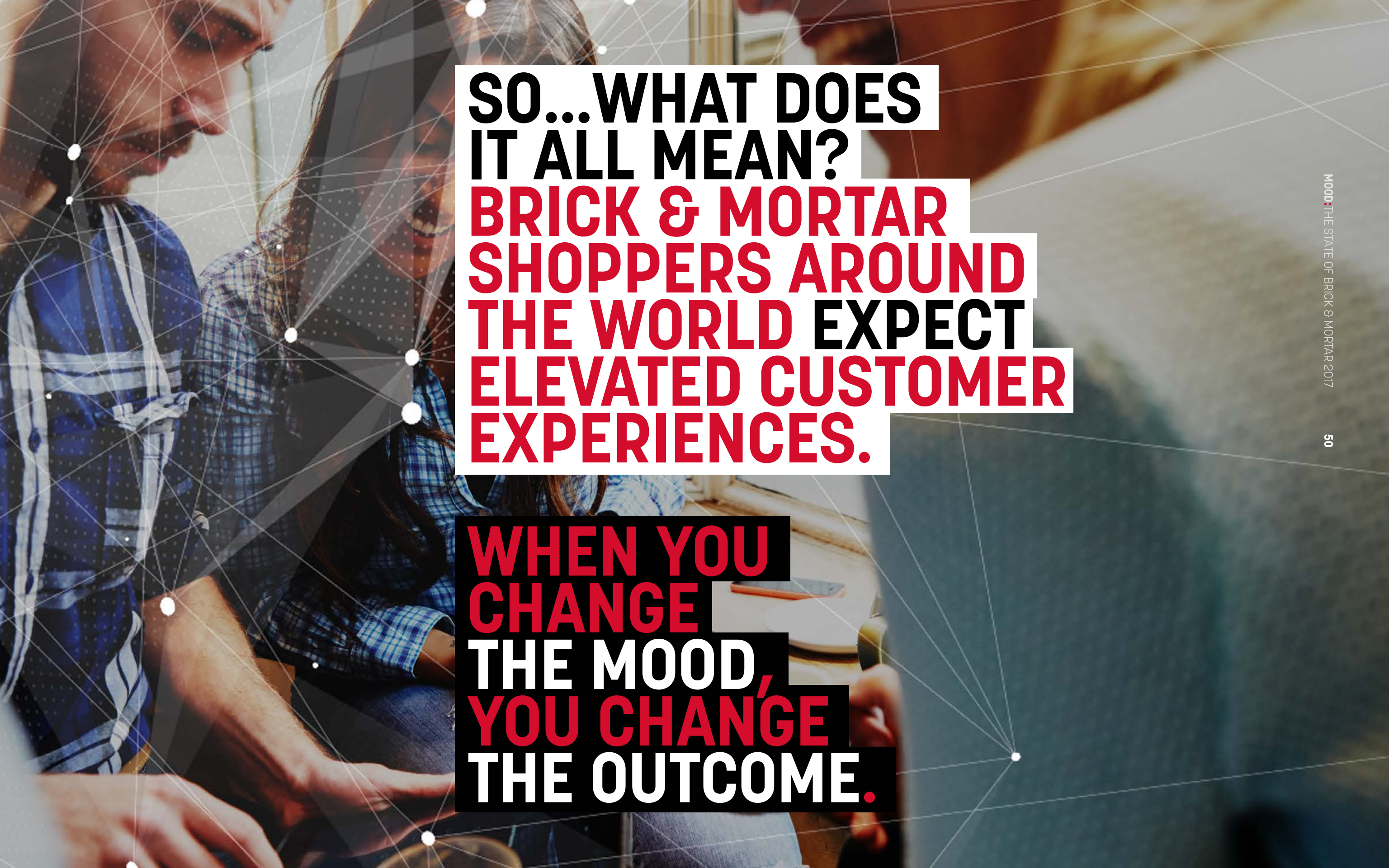




OUR PHONES GO IN-STORE WITH US



MOBILE= SHOPPING TOOL

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. 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.**



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