RETAIL

INTERNATIONAL OMNI-CHANNEL RETAIL REPORT 2021

Shopping in the pandemic and the implications for the future

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CONTENTS

EXECUTIVE SUMMARY

Global insights

- Both brick-and-mortar and online channels are pervasive with shoppers, with an average penetration across markets of 86% and 81%, respectively.
- Most shoppers globally use both online and brick-and-mortar to meet their needs, with nearly three-quarters (74%) having made purchases through both channels in the past three months.
- Channel reliance varies depending on product types, as essentials are more likely to be purchased in brick-and-mortar (78%) than online (57%), while discretionary items are more often bought online (72%) versus in-store (57%).
- While shopping has shifted online during the pandemic, many consumers still prefer to shop in person. This is particularly true in categories like clothing, where product interaction is important to the shopping experience, and where only 41% of those preferring to buy in-store did so.
- Brick-and-mortar and online channels present shoppers with different benefits and barriers that must be weighed when making the decision where to shop depending on trip missions and category needs.
  - Brick-and-mortar is preferred when needs are immediate, or it is important to physically experience the products.
  - Online shopping is preferred for the convenience of not having to leave the home, social distancing, and the benefits of wider assortment and detailed product information.

Differences around the world

- COVID-19 and governmental response has impacted shopping behavior globally. Nations with the most stringent social restrictions, such as in GB and Germany, show much higher rates of online penetration versus in-store, especially for discretionary items.
- The benefits and barriers which shoppers perceive in shopping online and via brick-and-mortar vary between developed and emerging markets. For example, shoppers in emerging markets are more likely to mention data security, payment methods, and delivery times as barriers to shopping online.

Divergence across demographics

- Globally, category purchase behavior online varies little across age cohorts with few exceptions such as 55+ buying medicine and books more often, or the youngest cohorts spending less on furniture.
- The younger the shopper, the more likely they are to show interest in virtual or augmented reality, emerging technologies which aim to bridge the product experience gap when shopping online.

OVERVIEW

Now more than ever it is crucial for retailers and brands to understand the dynamics impacting shoppers within the retail industry. No single event has had a more profound impact on shopping attitudes and behaviors globally than COVID-19, raising the stakes for retailers and manufacturers to better understand direct competitive forces, cross-channel interplay between online and brick-and-mortar outlets, and the certainty around how behaviors will normalize post-pandemic.

YouGov, with its rich database and profiling systems of consumers, conducted a global study to understand several of these retail dynamics. The insights in this report can help retailers, and the brands that compete within, focus on what matters most: concentrating on the largest benefit spaces and overcoming barriers to drive greater penetration and trip visits.

METHODOLOGY

This paper was produced using a combination of data from a custom RealTime survey among YouGov's industry-recognized panel, executed across 17 global markets, and the YouGov Cube, our proprietary connected data set encompassing hundreds of thousands of variables, collected over the course of a decade from panel members. It is the combination of the Cube's large panel size, breadth of variables, longitudinal history, and global coverage that allows us to provide a comprehensive view of consumer behaviors and attitudes across the world. For this analysis we leveraged our RealTime survey linked to YouGov Profiles, our always-on syndicated audience profiling solution that tracks hundreds of thousands of consumer variables in over 55 markets. Our survey was fielded the week of January 11th through the week of February 22nd, 2021, with respondents reflecting on their shopping behaviors and attitudes over the previous three months.

The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting scheme using interlocking demographic characteristics—methodology considered advanced in the market research industry. For this paper, the following population representation was used:

Market	Population sampled representation	Sample size (n=)
Australia	National representative - 16+	1,031
China	National online - 16+	1,011
Denmark	National representative - 18+	1,024
France	National representative - 18+	1,012
GB	National representative - 18+	2,113
Germany	National representative - 18+	1,014
Hong Kong	National online - 18+	504
India	National online (urban only) - 18+	1,021
Indonesia	National online - 18+	1,018
Italy	National representative - 18+	1,015
Mexico	National (urban focus) - 18+	1,069
Poland	National representative - 18+	1,011
Singapore	National representative - 18+	1,013
Spain	National representative - 18+	1,064
Sweden	National representative - 18+	1,012
UAE (United Arab Emirates)	National representative - 18+	1,005
US	National representative - 18 years of age +	2,251

Definitions and data aggregations

Several data points and charts have aggregated information across markets and categories. A review of the definitions used in this paper are found in the tables below.

Product categories grouping

Essentials	Discretionary
Cosmetics	Books
Household cleaning & laundry	Clothing
Household food & drink	Entertainment items
Medicines and medical supplies	eReaders, tablets
Personal, hair, facial and skin care	Footwear
Sanitary care	Furniture & home décor
	Household appliances
	Household consumer electrical items
	Jewelry and watches
	Mobile phones
	Personal computers
	Video gaming

Market types (based on Morgan Stanley Capital Index (MCSI) Market Classification)

Mature	Emerging
Australia	China
Denmark	India
France	Indonesia
GB	Mexico
Germany	Poland
Hong Kong	UAE
Italy	
Singapore	
Spain	
Sweden	
US	

Regions

Europe	North America	Asia Pacific	MEA
Denmark	Mexico	Australia	UAE
France	US	China	
GB		Hong Kong	
Germany		India	
Italy		Indonesia	
Poland		Singapore	
Spain			
Sweden			

GLOBAL BRICK-AND-MORTAR AND ONLINE RETAIL PURCHASE BEHAVIOR

Global and country channel penetration

Brick-and-mortar and online channels are pervasive among shoppers around the globe. The incidence of online and brick-and-mortar channels where people have purchased in the past 90 days ranges from 70-90% across all markets analyzed.

The strength of online retail is not just a mature market phenomenon either. Emerging markets such as Indonesia and India still have online penetration rates over the past 90 days hovering at 80%+ of the population.

In terms of market penetration, online channels still slightly lag behind brick-and-mortar in most countries. Only two markets analyzed (GB and China) reported a higher incidence of online versus brick-and-mortar purchases, while all other markets reported higher brick-and-mortar penetration.

Channel past 90 day penetration (% of respondents)

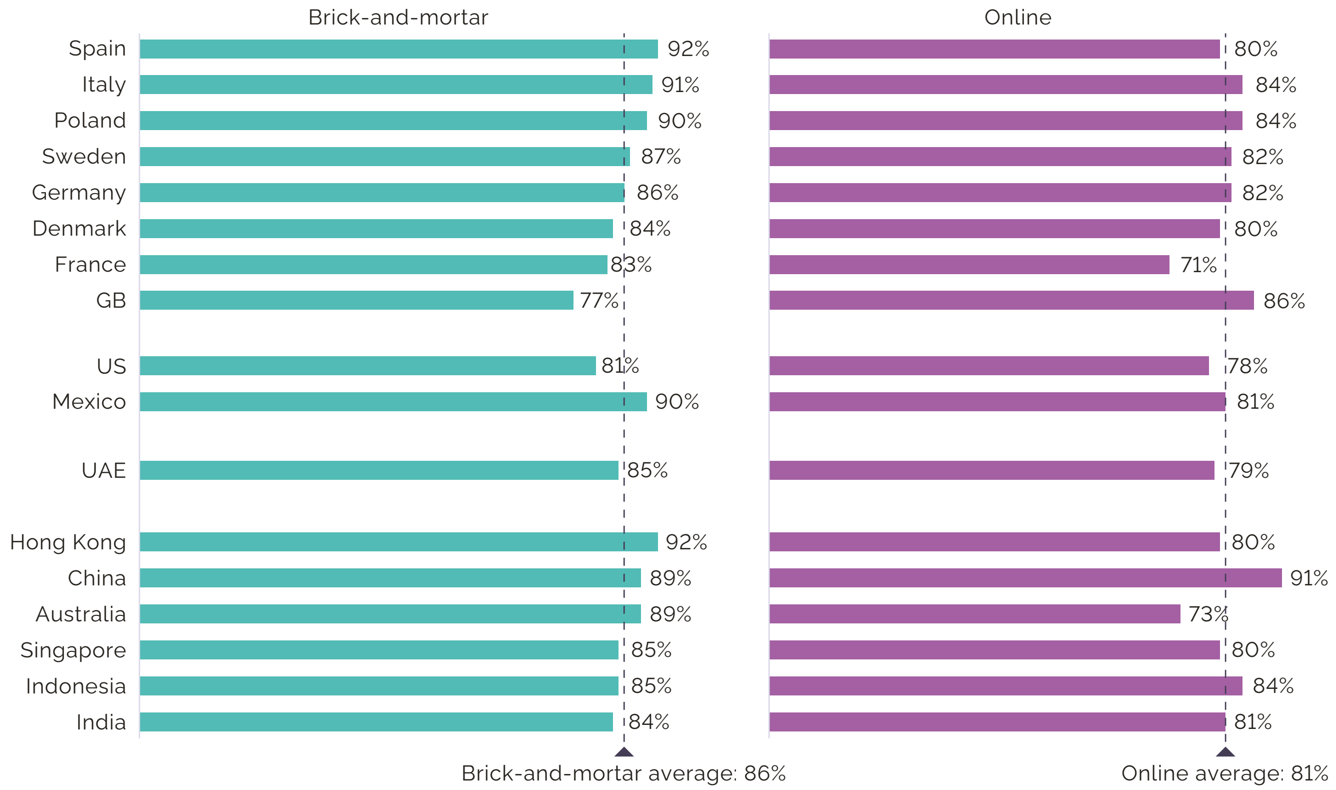

Figure 1

Which, if any, of these categories have you bought in person (from store) in the past three months?
(please DO NOT include items that you have bought online and collected in person). Please select all that apply.
(Above depicts nets across categories)

Which, if any, of these categories have you bought online in the past three months?
(Please include items that you have bought online and collected in person) Please select all that apply
(Above depicts nets across categories)

In terms of market penetration, online channels still slightly lag behind brick-and-mortar in most countries

Exclusive vs dual-channel shopping behavior

Much like other industry learnings on "repertoire" markets where consumers have a variety of choices, very few consumers shop exclusively at one channel or retailer. The graph below depicts how consumers shop across retail channels. Most consumers shop both across all geographies, with nearly 75% or more of consumers claiming to shop brick-and-mortar and online. GB has the highest proportion of "online only", while Australia has the greatest proportion of "brick-and-mortar only", which is driven at least partially by the pandemic and the country's retail restrictions in response.

Cross-channel past 90 day purchase behavior (% of respondents)

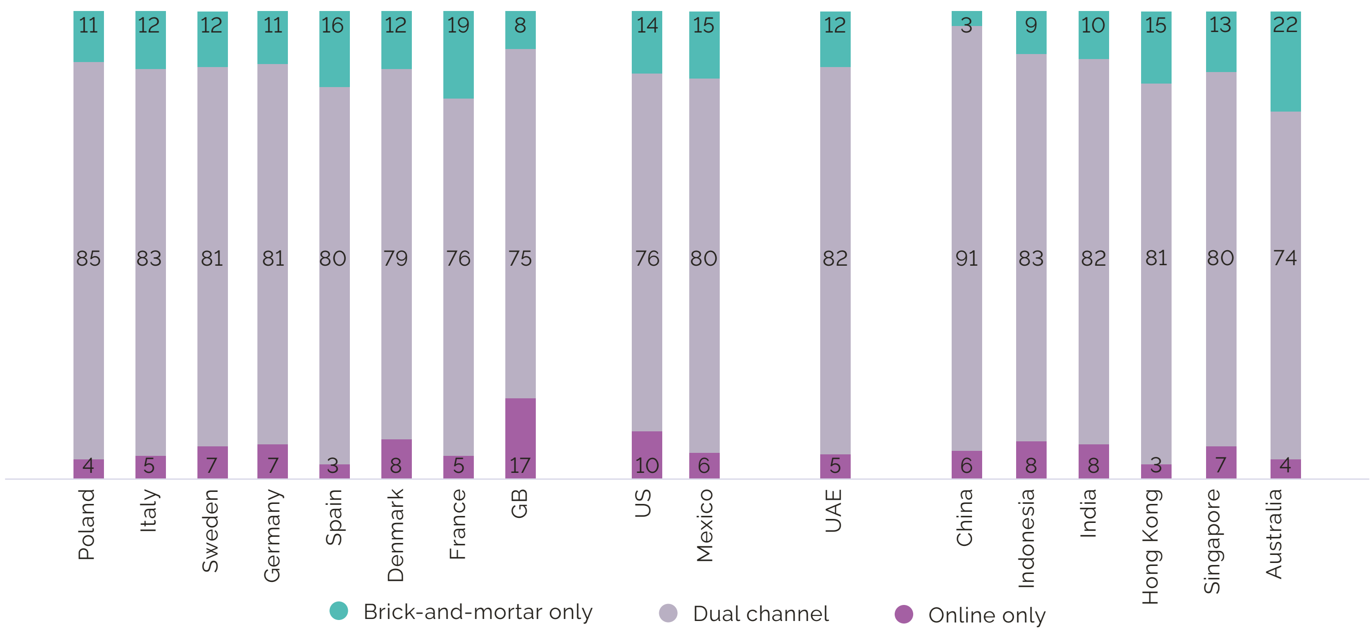

Figure 2

Which, if any, of these categories have you bought in person (from store) in the past three months? (please DO NOT include items that you have bought online and collected in person). Please select all that apply. (Above depicts nets across categories)

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply (Above depicts nets across categories)

Channel and product category purchase behavior

While both online and brick-and-mortar channels are well penetrated, it is shoppers' different trip types, missions, and category needs that often drive whether they will shop in person or online. We can start to distinguish between the channels and their relevancy by looking at the types of product categories consumers are buying in the respective channels.

Brick-and-mortar continues to be the go-to method for purchasing everyday essential items such as food, drinks, toiletries and more. Conversely, online retail channels are the preferred channel for discretionary items such as shoes, clothing, and electronics. Later we will examine the reasons people are using online retail channels for discretionary items, driven by a mix of pandemic restrictions, benefits of convenience, and in some markets, tech advances that improved the shopping experience.

Global product penetration (past 90 days) by type of goods (% of respondents)

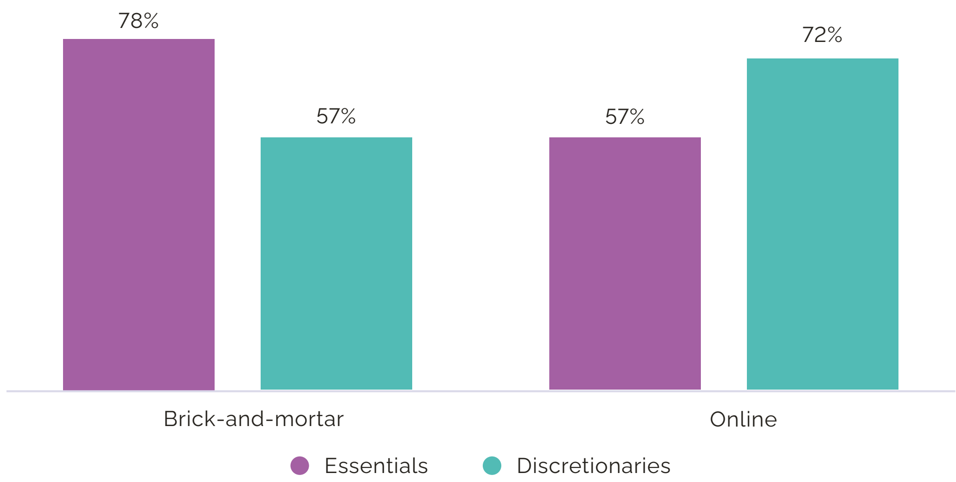

Figure 3

Which, if any, of these categories have you bought in person (from store) in the past three months? (please DO NOT include items that you have bought online and collected in person). Please select all that apply. (Above depicts nets across categories)

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply (Above depicts nets across categories)

Brick-and-mortar continues to be the go-to method for purchasing everyday essential items such as food, drinks, toiletries and more

Channel and product category purchase behavior deep dive

Zooming in on the types of goods people are looking to buy between brick-and-mortar and online highlights key differences in shopping behaviors.

Brick-and-mortar penetration levels are nearly double the online rates across essential categories. The largest gap is seen with food and drink items, where penetration is 32 points higher in brick-and-mortar channels.

We observe a different narrative playing out in discretionary categories, where every category measured apart from cosmetics, has a higher penetration online than in brick-and-mortar. Apparel and entertainment are two sectors showing significantly higher penetration levels online. Books and clothing categories show the greatest penetration gap between online and offline purchasing, at +13 and +12 points, respectively. It is worth noting while online is advantaged in these categories, the differences in favor of online are much smaller than what we see on the inverse in essentials.

Channel past 90 day penetration (% of respondents)

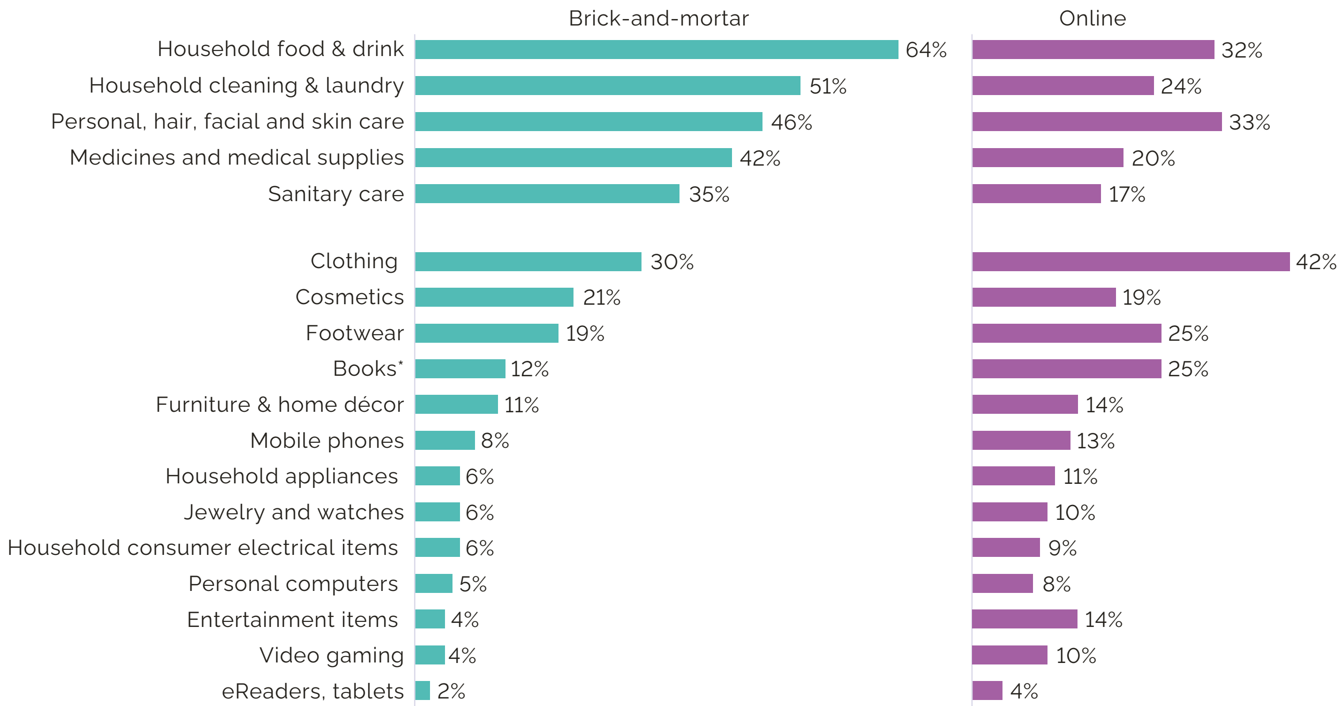

Figure 4

Which, if any, of these categories have you bought in person (from store) in the past three months? (please DO NOT include items that you have bought online and collected in person). Please select all that apply. (Above depicts nets across categories)

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply (Above depicts nets across categories)

*Wording: *BRICK-AND-MORTAR: Hard copies and not eBooks or audio books   Online: Physical, eBook, audio*

Every essential category measured apart from cosmetics, has a higher penetration online than in brick-and-mortar

Online product behavior by gender

Targeting women, versus men, for online retail is perhaps the greater of the two opportunities at the moment. Our research shows that women have much stronger online retail purchase behavior versus men for a variety of essential and discretionary product categories. Importantly, the biggest differences show up among the most penetrated categories online including personal care, clothing, and cosmetics.

Global online product penetration Global product penetration (past 90 days) (% of respondents by gender)

		Female %	Male %	Difference pt.
Sample size		**9,530**	**9,658**	
Essentials	**Personal, hair, facial and skin care**	**41**	**25**	**+16**
	Cosmetics	**27**	**12**	**+15**
	Sanitary care	20	14	+6
	Household cleaning & laundry	26	21	+6
	Medicines and medical supplies	22	18	+4
	Household food & drink	34	31	+3
Discretionary	**Clothing**	**49**	**35**	**+14**
	Books	28	22	+6
	Footwear	27	22	+5
	Furniture & home décor	16	12	+4
	Jewelry and watches	12	8	+3
	Household appliances	9	9	0
	eReaders, tablets	4	5	–1
	Entertainment items	12	16	–3
	Personal computers	6	10	–4
	Mobile phones	11	16	–5
	Household consumer electrical items	8	14	–6
	Video gaming	7	14	–7

Figure 5

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply.

Our research shows that women have much stronger online retail purchase behavior versus men

Online product behavior by age

The data also shows that online purchase behavior is largely similar until you approach the 55+ age cohort, where incidence is lower across most measured categories. While online penetration is lower among the older generation, it is still a sizeable demographic across countries, that offers a large opportunity for penetration growth which should not be ignored.

The product category exceptions to these may be driven by category relevancy to particular cohorts. The youngest cohort exhibits lower penetration across household cleaning & laundry, medicines, furniture & home décor, and household appliances—all categories they are generally less likely to engage with versus middle and older age cohorts.

Global online product penetration (past 90 days) (% of respondents by age)

		All	18-24	25-34	35-44	45-54	55+
Sample size		**19,188**	**2,451**	**4,102**	**3,509**	**3,133**	**5,993**
Essentials	Personal, hair, facial and skin care	33	35	39	37	34	25
	Household food & drink	32	30	37	38	33	27
	Household cleaning & laundry	24	16	26	30	26	20
	Medicines and medical supplies	20	16	22	20	20	20
	Cosmetics	19	23	24	23	19	13
	Sanitary care	17	16	20	22	17	12
Discretionary	Clothing	42	44	46	46	44	36
	Books	25	22	23	25	26	28
	Footwear	25	23	27	30	27	20
	Furniture & home décor	14	10	16	16	16	13
	Entertainment items	14	15	16	17	14	10
	Mobile phones	13	12	15	17	15	9
	Household consumer electrical items	11	8	12	13	12	10
	Video gaming	10	16	16	14	10	3
	Jewelry and watches	10	13	12	11	10	7
	Household appliances	9	5	8	10	11	10
	Personal computers	8	9	10	10	8	5
	eReaders, tablets	4	4	5	5	4	4

Figure 6

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply.

Online purchase behavior is largely similar until you approach the 55+ age cohort

Impact of Covid-19 on channel behavior

The action of buying discretionary items online varies between markets, to some extent driven by restrictions due to COVID-19. While the pandemic dramatically impacted shopping behavior globally, we see major differences across markets when looking at discretionary categories by channel. The biggest disparity between channels as it pertains to discretionary goods is in GB and Germany, two nations with stiffer government restrictions, where online shopping penetration is 30-45 points higher for online channels than brick and mortar. Other western markets such as Denmark and Sweden have also seen a dramatic shift to online.

Markets that have suffered “milder” outbreaks (and more relaxed shopping restrictions) such as Australia have gone the opposite way, with people claiming to shop more in brick-and-mortar outlets than online in the past 90 days.

Past 90 day channel penetration for discretionary goods (% of respondents)

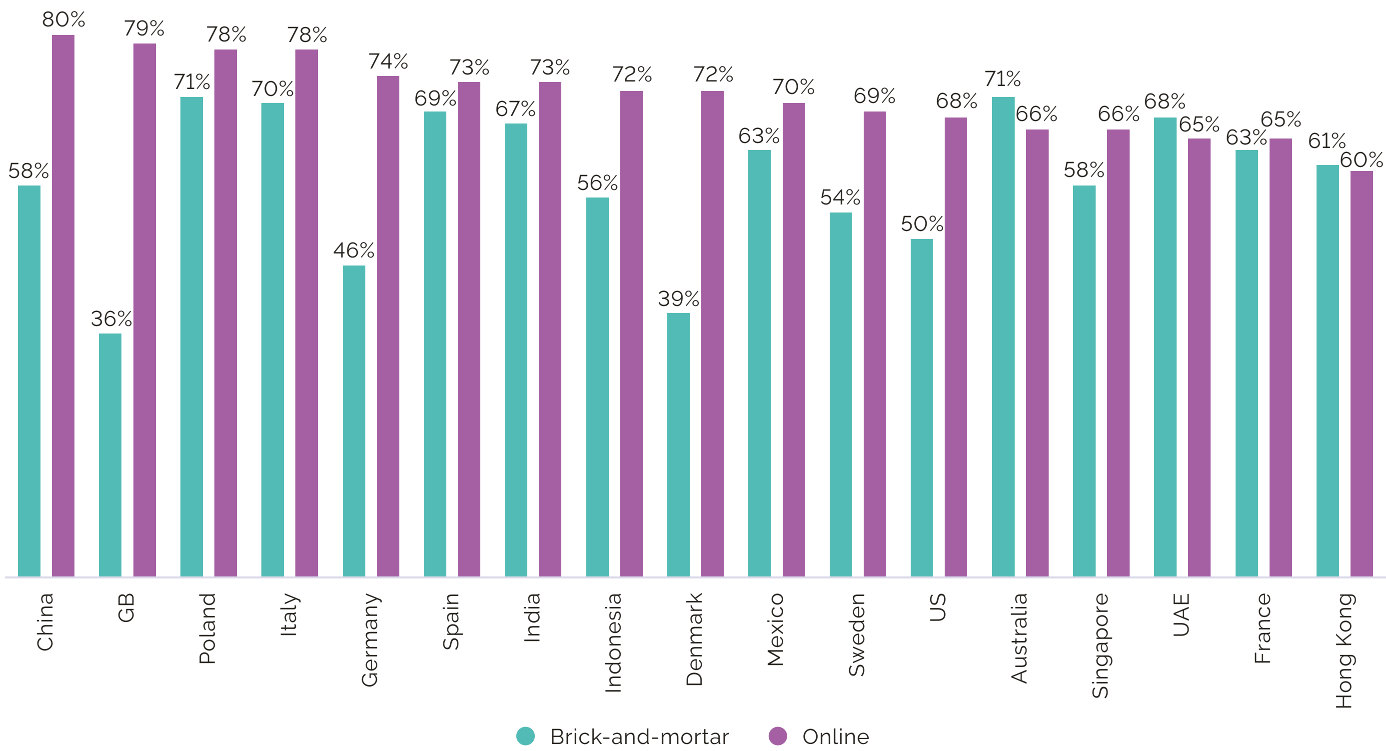

Figure 7

Which, if any, of these categories have you bought in person (from store) in the past three months? (please DO NOT include items that you have bought online and collected in person). Please select all that apply. (Above depicts nets across categories)

Which, if any, of these categories have you bought online in the past three months? (please include items that you have bought online and collected in person) Please select all that apply (Above depicts nets across categories)

National policies on social distancing greatly impacted discretionary shoppers’ choice of online vs. in person shopping

A contradiction in channel preferences and behaviors

Despite the growth of online retail, there are still many shoppers that want to buy through brick-and-mortar outlets. We asked consumers about channel preferences for one specific and exceptionally large category—clothing. We then compared their actual shopping behavior for clothing with what they wanted to do, to see how actions compared to desires.

The results were astounding. In Western European countries and the US, less than 50% of consumers who wanted to shop brick-and-mortar channels for clothing were doing so. Several of these countries have undergone some of the strictest restrictions around the globe due to the pandemic. Consumers were still buying clothes, even if they were not doing so in their preferred channel. GB and Germany ranked lowest on brick-and-mortar conversion among those that wanted to buy in that channel, with only 22% of this cohort purchasing in-store.

For brick-and-mortar retailers this raises both optimism and concern looking forward. On one hand, there is reason to believe that after the pandemic ends consumers will return to the shopping channel they prefer. That is assuming that under the current restrictions, they have not discovered something from shopping via online channels that will impact their long-term behavior. The outlook that many will return to physical stores is favorable, given that recent online clothing shoppers say they still prefer brick-and-mortar.

While this is good news if you are a brick-and-mortar retailer, it does not help right now in countries still under tight restrictions and battling the ongoing threat that Covid-19 poses. On the positive, the pandemic prompted many retailers to embrace an omni-channel approach, which should benefit them long term to meet uncertainty impacting shoppers.

Past 90 day brick-and-mortar clothing penetration among those that prefer to buy clothes in brick-and-mortar (% of respondents)

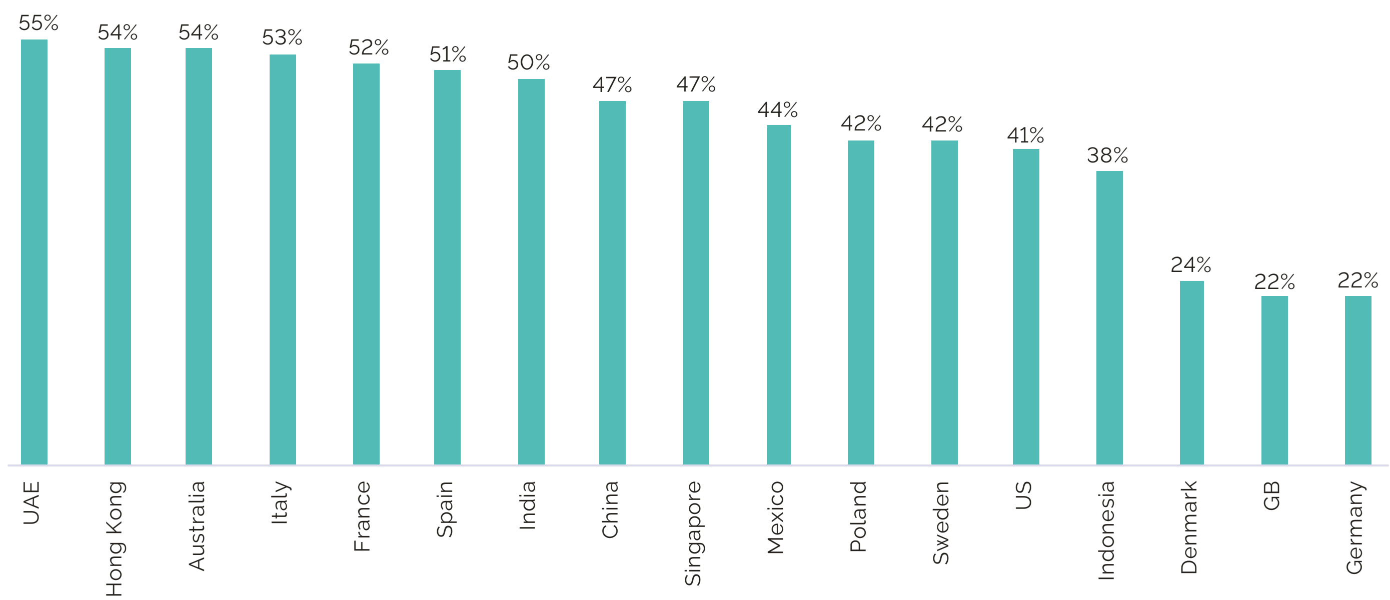

Figure 8

Which, if any, of these categories have you bought in person (from store) in the past three months? (please DO NOT include items that you have bought online and collected in person). Please select all that apply. (Above depicts nets across categories)

Question: Which, if any, of the following categories do you prefer to buy in person (from a store)? (for the purposes of this question please imagine covid-19 pandemic has ended and you can shop without restrictions) Please select all that apply.

Filter: Selected "Yes" for clothing category:

ONLINE CHANNEL KEYS TO WINNING

Benefit territories of online retail

Online retailers have benefited in the short term by addressing the challenges shoppers face in buying goods while also adhering to social distancing restrictions. Home delivery is the number one motivational factor to buy online, and we would expect that to continue even after the pandemic ends. In general, convenience is seen as online's biggest macro-benefit, as many shoppers said it is "easier to purchase things online" and "easier to compare products."

Another key benefit which online clearly owns is that of "endless" variety, as online assortment is not constrained by the same physical shelf space as brick-and-mortar. While this advantage will win some shoppers, there is still an onus on online retailers to make their virtual storefronts as shoppable as possible with the expanded assortment, as some shoppers can be overwhelmed with too much choice.

Key motivational factors to purchase goods from online channels (% of respondents)

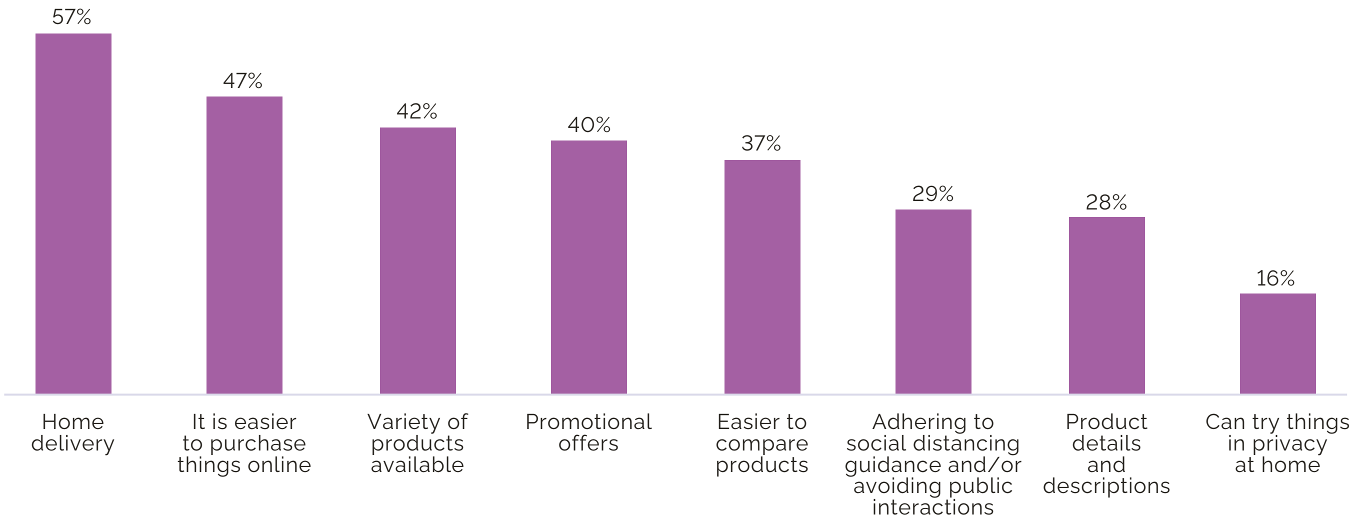

Figure 9

Question: Which, if any, of the motivates you to purchase items online? Please select all that apply.

Barriers to address for online retail

Online retailers must address the barriers that exist for channel adoption, revolving around different facets of value, convenience, and experience. Delivery charges and the inability to physically experience products ranked highest in terms of barriers. While many see convenience as a benefit by limiting the need for a trip to the store, there are times that delivery waits become a barrier, especially when shoppers' needs are immediate. Online retailers are progressing in reducing these barriers by investing in infrastructure to reduce delivery times and embracing technologies like virtual reality to provide more of an "in-store" experience.

Key barriers to purchase goods from online channels (% of respondents)

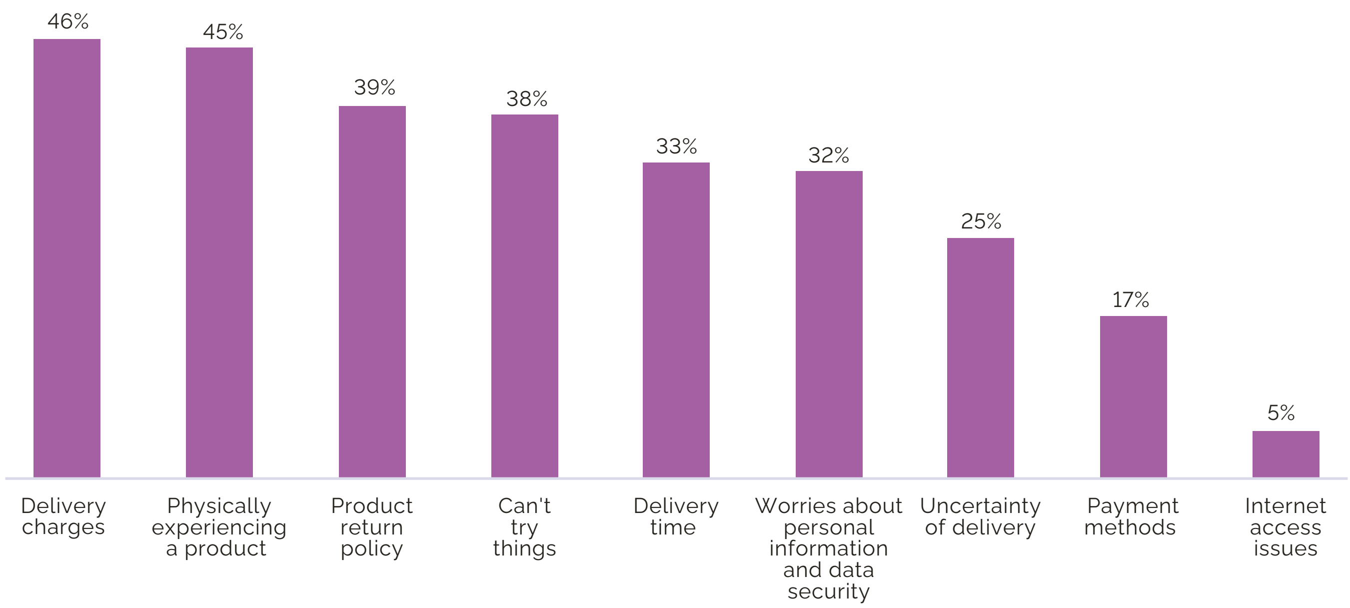

Figure 10

Question: Which, if any, of the following dissuade you from buying things online? Please select all that apply.

BRICK-AND-MORTAR KEYS TO WINNING

Benefit territories of brick-and-mortar retail

Brick-and-mortar will always play a critical role in meeting certain needs of consumers. In the near future, in-store provides experiences that cannot currently be found online. The top reasons people shop in brick-and-mortar include physically experiencing products, and the ability to try things in store. While tech advances and improved online user experience are helping to close the experience gap, no technology will be able to fully replicate the act of touching and smelling fresh produce or trying on a pair of new jeans. Beyond experience, convenience can be another key motivator for brick-and-mortar channels, especially when needs are immediate.

Key motivational factors to purchase goods from brick-and-mortar channels (% of respondents)

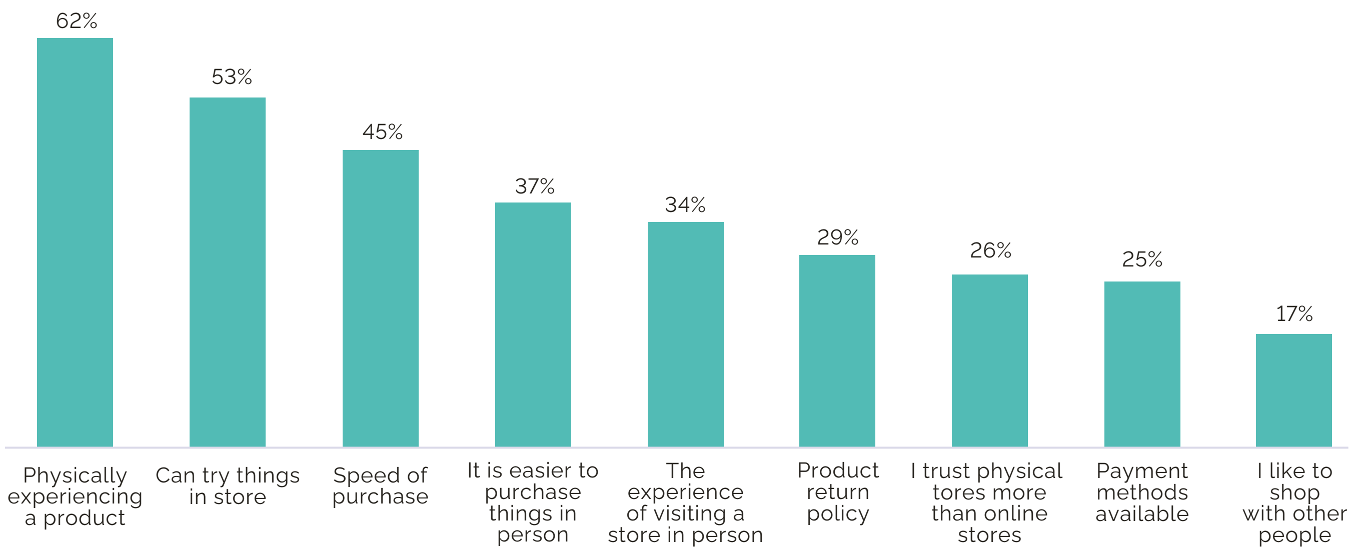

Figure 11

Question: Which, if any, of the motivates you to purchase items in person (from store)? Please select all that apply.

Barriers to address for brick-and-mortar retail

Brick-and-mortar outlets are not without challenges, some of which are more acute now given the pandemic. The number one reason people claimed they have not shopped at a brick-and-mortar outlet is due to social restrictions.

After the pandemic subsides, for retailers to grow, whether they operate exclusively online, brick-and-mortar only, or in both, they need to attract more shoppers to their "stores". To do so, it is imperative they reduce friction and eliminate barriers that today might be impeding certain groups of shoppers from shopping with them.

Brick-and-mortar retailers should look carefully at the way they generate value through competitive promotions and offers as well as improving the convenience of the in-store experience. There is an opportunity to explore physical store designs and locations that address common barriers and capitalize on a growing trend to shop local.

It is worth noting that while variety was the third most commonly selected motivator for shopping online, only 27% cite lack of variety as a barrier to shopping brick-and-mortar.

Key barriers to purchase goods from brick-and-mortar channels (% of respondents)

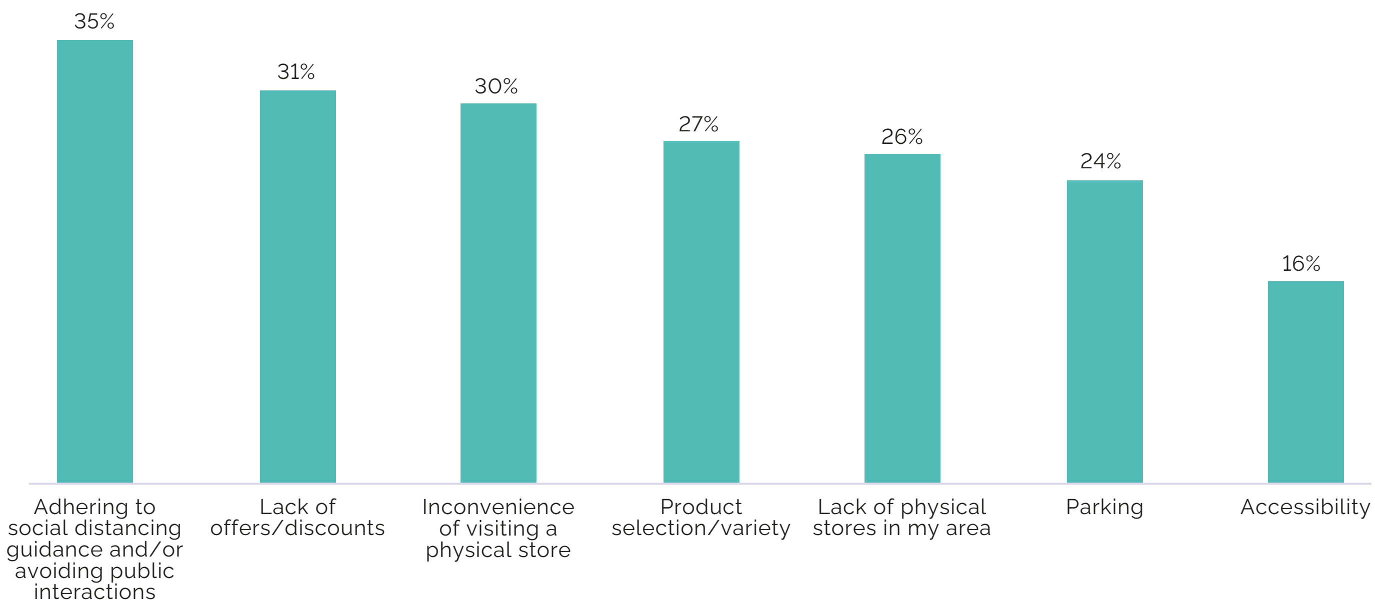

Figure 12

Question: Which, if any, of the following dissuade you from buying things in person (from store)? Please select all that apply.

Brick-and-mortar retailers should explore enhancements to store design and location to address convenience barriers

CHANNEL BARRIERS BY GEOGRAPHY

The key motivators to shop in specific channels do not differ much in rank order when comparing across demographics and geographics. This is welcome information for global retailers because it means they can confidently explore positions around these benefit territories that will work across the board. This allows retailers to benefit from greater scale around one idea versus having to invest significantly into customization market by market, segment by segment.

The double-jeopardy rule for retailers says that growth will come from attracting more buyers and with it capturing slightly more trips from each buyer. Getting more customers means addressing barriers that are mitigating penetration today, and those inhibitors differ in some ways across geographic and demographic attributes. If a retailer can successfully address these nuanced differences across markets and cohorts, they will be far more likely to succeed in attracting additional shoppers.

When we look at the key purchase barriers in brick-and-mortar by market region, we uncover some noticeable differences in pain points that impede shopping in person in emerging markets. Shoppers in these emerging markets reported higher barrier levels, most notably around offers and discounts, and to a lesser extent product assortment and convenience.

Key barriers to purchase goods from brick-and-mortar channels (% of respondents)

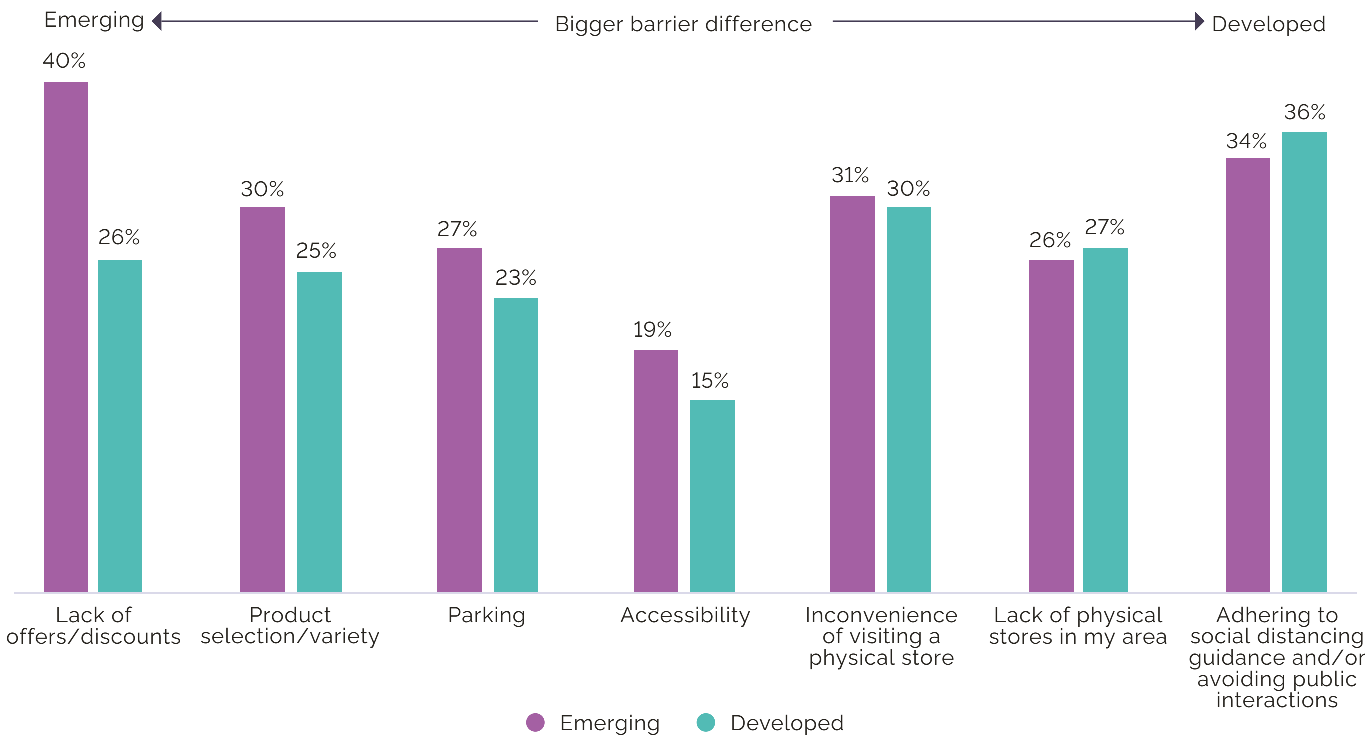

Figure 13

Question: Which, if any, of the following dissuade you from buying things in person (from store)? Please select all that apply.

When we look at the barriers to shopping online channels, we see notable differences between developed and emerging markets. In developing nations, the biggest barriers are cost (delivery charges) and experience-related (inability to try products). In emerging markets, shoppers reported higher barrier levels around information security and payment methods. Given cash still is a common form of payment in emerging markets, retailers should look to address this issue directly or convert consumers to digital methods to alleviate concerns.

Key barriers to purchase goods from online channels (% of respondents)

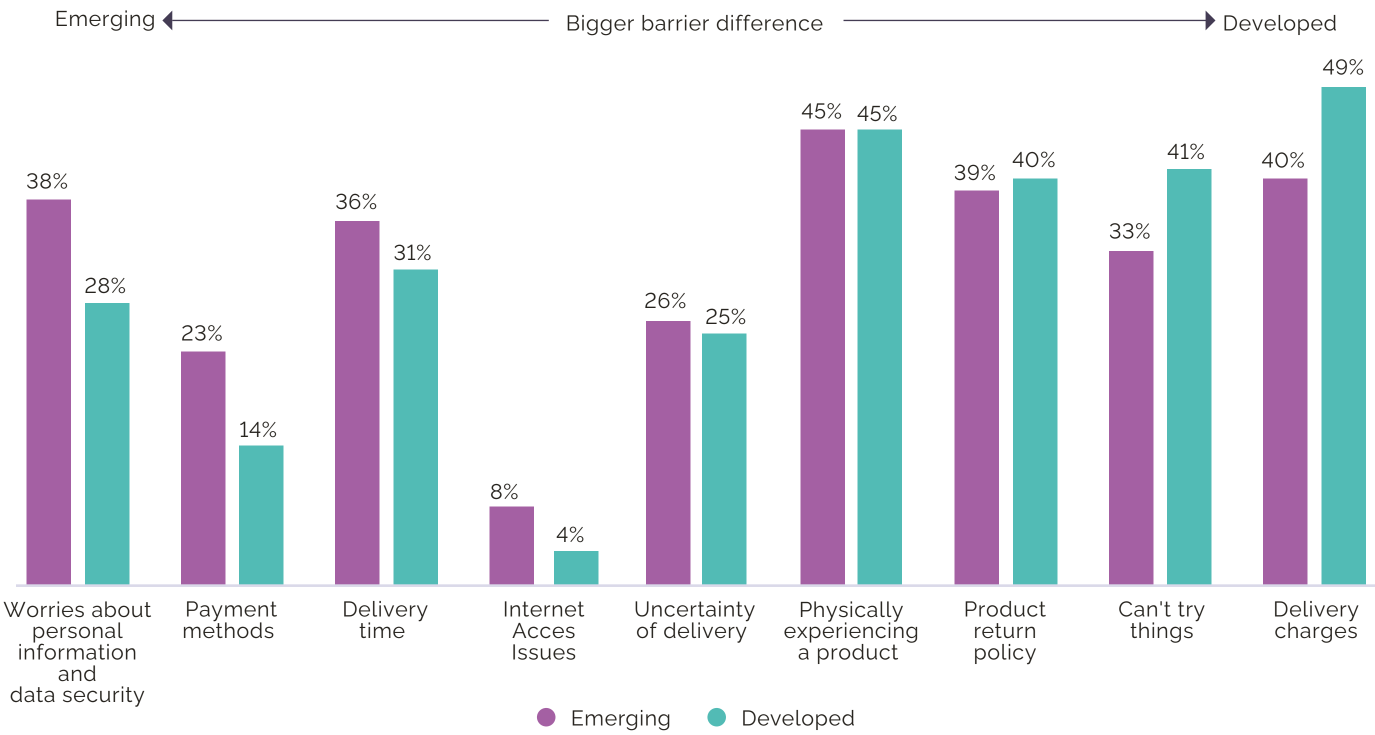

Figure 14

Question: Which, if any, of the following dissuade you from buying things online? Please select all that apply.

Online retailers in emerging markets should look to address payment barriers to drive greater channel engagement

IMPROVING THE EXPERIENCE: INTEREST & INTENT FOR VIRTUAL REALITY AND AUGMENTED REALITY

Technological innovation, such as virtual or augmented reality tools, offer online retailers an opportunity to reduce barriers by simulating in-person experiences. While the technology exists, when we ask consumers how they feel about this idea our findings show that interest in such tools varies by category, but overall, is still fairly nascent. Less than 50% of consumers globally claim interest in using this technology for any category specifically. Consumers show most interest in using these solutions for clothes and technology, two categories that shoppers prefer to engage with in person.

Interest by product category and age breaks

There are also key differences across age cohorts and interest in these technologies. The younger the cohort, the higher the interest. Familiarity with this type of technology will grow and it can be anticipated that favourability to use it will grow in turn as younger generations become older and the less interested generations become a smaller size of the overall shopper market.

Global VR/AR interest by category (% of respondents by age)

	18–24	25–34	35–44	45–54	55+	All
Sample Size	**2,451**	**4,102**	**3,509**	**3,133**	**5,993**	**19,188**
Clothes	52	50	45	44	34	43
Technologies/home appliances	40	39	40	36	29	36
Furniture	32	35	34	28	21	29
Video games	38	31	2	14	5	20

Figure 17

Question: Thinking of the clothes/goods you might buy in the next 12 months, which of the following categories would you be interested in trying via augmented reality/virtual reality before making a purchase?

Interest by geography

The outlook for this technology and its adoption also looks different across the world. We did not specifically explore the reasons for this, but the data shows a clear story-interest to adopt virtual or augmented reality across the board is higher in Asia, the UAE, and Mexico compared to Western Europe and the US.

Global VR/AR interest by category (% of respondents by region/country)

	USA	Europe	Asia Pacific	Mexico	UAE	All
Sample size	**2,251**	**9,265**	**5,598**	**1,069**	**1,005**	**19,188**
Clothes	27	41	50	60	53	43
Technologies/home appliances	22	30	46	51	46	36
Furniture	23	28	31	39	34	29
Video games	18	14	28	27	23	20

Figure 18

Question: Thinking of the clothes/goods you might buy in the next 12 months, which of the following categories would you be interested in trying via augmented reality/virtual reality before making a purchase?

Interest to adopt virtual or augmented reality is higher in Asia, the UAE, and Mexico, and among younger age cohorts

WINNING IN RETAIL - NOW AND THE FUTURE

To win in the marketplace in the future, retailers will need to be smart in the strategies they implement as resources are finite. Our research uncovered many key motivators and barriers to shopping, across online and brick-and-mortar, that retailers and brands must consider. If we ladder up these motivators and barriers, we can conclude that shoppers' attitudes and habits reflect how channels and retailers deliver on three areas: Shopping experience, convenience, and value. The table below provides a brief snapshot of the strengths and weaknesses of online and offline channels across these benefit areas.

	Experience	Convenience	Value
Brick-and-mortar motivators	Physically experiencing & trying products The retail experience Return policies Trust in physical stores	Speed of purchase Easier to buy in person	
Brick-and-mortar barriers	Social distancing restrictions Limited assortment	Inconvenient to visit store Parking Distance to store	Lack of offers & promotions
Online motivators	Variety & assortment Product details, descriptions & ratings	Home delivery Easier to purchase online Easier to compare items	Promotional offers
Online barriers	Cannot experience a physical product Return policies Data privacy	Delivery times	Delivery charges

Figure 19

There are numerous paths a retailer could take to grow their shopper base. What is right for one chain in Europe, may not work for another in the United States. Success will ultimately come to those that intimately understand the shoppers within their markets, act in a manner that appeals to those shoppers by addressing barriers and building distinct experiences appealing to them, all while doing so in a profitable manner.

One thing that this past year has shown us is that shoppers' needs and behaviors can change quickly. The pandemic drove unprecedented behavioral shifts, many of which will have staying power long after social restrictions ease. It is a certainty that shoppers' desire and habits will continue to morph over time. Retailers will need to remain ready and continue to evolve to stay in line with their shoppers.

This paper represents just a fraction of the data we collect on the retail industry. Please contact one of our experts to find out more.

The pandemic drove unprecedented behavioral shifts, many of which will have staying power long after social restrictions ease

APPENDIX A: MARKET SNAPSHOTS

APAC Region

A1: Brick-and-mortar past 3 months channel product purchase incidence

	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample Size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Household food & drink	67%	55%	61%	41%	50%	55%	54%
Personal, hair, facial and skin care	54%	26%	46%	33%	37%	41%	39%
Household cleaning & laundry	60%	26%	39%	37%	32%	37%	39%
Medicines & medical supplies	55%	27%	25%	40%	36%	30%	36%
Clothing	42%	28%	35%	34%	23%	33%	32%
Sanitary care	28%	17%	33%	35%	16%	23%	25%
Footwear	28%	21%	18%	28%	13%	21%	22%
Cosmetics	24%	15%	17%	25%	18%	14%	19%
Books	17%	12%	7%	16%	8%	7%	12%
Mobile phones	10%	9%	10%	15%	13%	10%	11%
Furniture & home décor	14%	8%	11%	12%	12%	11%	11%
Household appliances	9%	3%	7%	10%	12%	9%	9%
Jewelry and watches	12%	6%	6%	11%	9%	8%	9%
Household consumer electrical items	8%	5%	5%	12%	8%	8%	8%
Personal computers	7%	7%	6%	9%	8%	5%	7%
Entertainment items	8%	7%	3%	8%	4%	3%	6%
Video gaming	8%	6%	5%	5%	4%	2%	5%
eReaders, tablets	3%	6%	4%	5%	3%	1%	4%

A2: Online past 3 months channel product purchase incidence

	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Clothing	37%	52%	29%	45%	45%	39%	42%
Household food & drink	26%	55%	38%	33%	37%	39%	38%
Personal, hair, facial and skin care	40%	45%	30%	42%	34%	25%	36%
Household cleaning & laundry	20%	33%	26%	31%	21%	30%	27%
Footwear	20%	36%	17%	34%	14%	19%	24%
Cosmetics	16%	27%	12%	29%	27%	13%	21%
Books	21%	26%	12%	22%	14%	11%	18%
Medicines and medical supplies	14%	22%	9%	26%	20%	11%	18%
Sanitary care	11%	21%	23%	29%	14%	13%	18%
Mobile phones	29%	16%	6%	13%	11%	10%	15%
Entertainment items	12%	16%	11%	14%	12%	10%	13%
Furniture & home décor	12%	11%	10%	13%	14%	11%	12%
Household consumer electrical items	8%	10%	8%	13%	13%	11%	11%
Jewelry and watches	14%	7%	7%	11%	9%	10%	10%
Video gaming	10%	14%	10%	7%	8%	8%	9%
Household appliances	6%	8%	6%	13%	10%	9%	9%
Personal computers	7%	12%	8%	11%	8%	8%	9%
eReaders, tablets	4%	6%	4%	6%	2%	4%	4%

A3: Preference for shopping brick-and-mortar channels

	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Household food & drink	60%	45%	54%	37%	48%	38%	46%
Clothing	55%	31%	50%	40%	37%	43%	42%
Medicines and medical supplies	53%	26%	32%	40%	35%	33%	37%
Footwear	54%	27%	44%	40%	20%	40%	37%
Personal, hair, facial and skin care	48%	24%	46%	36%	32%	31%	35%
Household cleaning & laundry	49%	17%	34%	33%	25%	26%	30%
Furniture & home décor	43%	12%	31%	28%	25%	34%	29%
Mobile phones	36%	14%	35%	24%	32%	33%	29%
Personal computers	35%	11%	29%	22%	28%	31%	26%
Household appliances	39%	8%	27%	21%	23%	33%	25%
Jewelry and watches	33%	11%	29%	28%	23%	24%	24%
Cosmetics	32%	16%	28%	30%	21%	19%	24%
Household consumer electrical items	35%	9%	22%	20%	27%	27%	24%
Sanitary care	28%	15%	34%	31%	16%	16%	23%
Books	25%	14%	19%	21%	15%	12%	18%
Entertainment items	18%	8%	17%	14%	10%	7%	12%
eReaders, tablets	17%	9%	14%	10%	11%	11%	12%
Video gaming	12%	7%	12%	7%	7%	5%	8%

A4: Category motivators for brick-and-mortar channels

	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Physically experiencing a product	65%	53%	67%	53%	58%	65%	60%
Can try things in store	60%	35%	44%	39%	59%	59%	50%
Speed of purchase	52%	37%	39%	46%	47%	43%	44%
It is easier to purchase things in person	46%	31%	43%	40%	46%	39%	40%
The experience of visiting a store in person	34%	25%	46%	35%	39%	34%	35%
Product return policy	40%	18%	19%	35%	32%	29%	30%
I trust physical stores more than online stores	36%	24%	29%	32%	26%	30%	30%
Payment methods available	31%	13%	22%	37%	29%	26%	27%
I like to shop with other people	15%	13%	15%	19%	12%	11%	14%

A5: Category barriers for brick-and-mortar channels

Brick-and-mortar - barriers	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Lack of offers/discounts	28%	45%	42%	47%	52%	46%	44%
Inconvenience of visiting a physical store	33%	43%	39%	31%	32%	46%	37%
Adhering to social distancing guidance and/or avoiding public interactions	33%	27%	35%	37%	33%	29%	32%
Product selection/variety	27%	31%	24%	35%	36%	25%	30%
Lack of physical stores in my area	26%	26%	26%	26%	27%	31%	27%
Parking	31%	24%	9%	29%	24%	23%	25%
Accessibility	16%	10%	6%	22%	19%	30%	18%

A6: Category motivators for online channels

Buying online - motivators	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample Size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Home delivery	48%	51%	43%	66%	56%	63%	55%
It is easier to purchase things online	41%	54%	42%	53%	60%	46%	50%
Promotional offers	38%	39%	53%	52%	59%	34%	45%
Variety of products available	36%	40%	30%	50%	44%	39%	41%
Easier to compare products	33%	36%	39%	51%	42%	42%	41%
Product details and descriptions	41%	28%	27%	38%	34%	26%	33%
Adhering to social distancing guidance and/or avoiding public interactions	22%	19%	23%	32%	32%	24%	25%
Can try things in privacy at home	13%	17%	13%	28%	18%	13%	17%

A7: Category barriers for online channels

Buying online - motivators	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Delivery charges	55%	28%	49%	39%	50%	55%	46%
Physically experiencing a product	47%	42%	48%	41%	41%	51%	45%
Product return policy	45%	34%	36%	45%	34%	45%	40%
Delivery time	43%	32%	38%	36%	44%	36%	38%
Worries about personal information and data security	34%	36%	33%	38%	35%	38%	36%
Can't try things	45%	16%	37%	20%	48%	46%	35%
Uncertainty of delivery	24%	25%	27%	29%	35%	31%	29%
Payment methods	17%	14%	17%	29%	21%	16%	20%
Lack of internet access/quality of internet access	4%	14%	8%	10%	11%	6%	9%

A8: Interest in virtual reality and augmented reality

Virtual reality interest	Australia	China	Hong Kong	India	Indonesia	Singapore	All
Sample size	**1031**	**1011**	**504**	**1021**	**1018**	**1013**	**5598**
Clothes	40%	59%	50%	67%	44%	39%	50%
Technologies/home appliances	34%	48%	41%	56%	50%	43%	46%
Furniture	30%	25%	25%	37%	35%	28%	31%
Video games	22%	35%	23%	18%	48%	16%	28%
None of these	28%	7%	15%	8%	4%	24%	14%

Europe

B1: Brick-and-mortar past 3 months channel product purchase incidence

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Household food & drink	71%	63%	68%	70%	73%	70%	79%	74%	71%
Household cleaning & laundry	52%	54%	50%	59%	70%	60%	70%	50%	57%
Personal, hair, facial and skin care	38%	55%	42%	59%	63%	53%	61%	42%	51%
Medicines and medical supplies	43%	36%	39%	36%	59%	54%	62%	45%	46%
Sanitary care	11%	39%	19%	54%	60%	58%	67%	49%	42%
Clothing	19%	36%	17%	14%	40%	30%	38%	32%	27%
Cosmetics	10%	26%	12%	26%	27%	52%	35%	13%	24%
Footwear	7%	24%	6%	8%	29%	24%	27%	17%	16%
Books	9%	20%	10%	9%	24%	14%	18%	10%	14%
Furniture & home décor	7%	14%	8%	5%	12%	14%	14%	14%	11%
Household appliances	2%	7%	2%	3%	10%	9%	8%	7%	5%
Mobile phones	3%	5%	1%	2%	9%	10%	8%	5%	5%
Household consumer electrical items	3%	3%	2%	2%	7%	6%	6%	8%	5%
Jewelry and watches	3%	6%	1%	3%	7%	7%	6%	6%	4%
Entertainment items	2%	6%	3%	2%	3%	3%	4%	4%	3%
Video gaming	1%	5%	2%	2%	4%	2%	5%	2%	3%
Personal computers	1%	2%	1%	2%	5%	4%	4%	3%	3%
eReaders, tablets	1%	1%	1%	1%	3%	2%	2%	1%	1%

B2: Online past 3 months channel product purchase incidence

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Clothing	44%	39%	48%	47%	36%	45%	44%	44%	44%
Books	23%	21%	41%	29%	39%	29%	28%	26%	31%
Personal, hair, facial and skin care	27%	19%	34%	22%	37%	33%	27%	37%	30%
Household food & drink	25%	20%	44%	16%	25%	26%	21%	30%	28%
Footwear	21%	22%	26%	26%	24%	34%	28%	23%	26%
Household cleaning & laundry	13%	13%	29%	11%	25%	30%	18%	16%	20%
Medicines and medical supplies	14%	5%	19%	29%	19%	25%	9%	40%	20%
Cosmetics	12%	18%	15%	15%	21%	39%	19%	20%	19%
Furniture & home décor	15%	14%	18%	14%	14%	18%	14%	15%	16%
Sanitary care	3%	8%	12%	12%	19%	25%	19%	29%	15%
Entertainment items	11%	8%	20%	15%	14%	13%	11%	14%	14%
Mobile phones	8%	9%	9%	10%	17%	17%	17%	10%	12%
Household consumer electrical items	11%	6%	13%	8%	19%	11%	13%	11%	11%
Video gaming	7%	8%	13%	8%	11%	11%	13%	10%	10%
Jewelry and watches	10%	9%	9%	10%	13%	14%	9%	8%	10%
Household appliances	6%	7%	11%	11%	13%	13%	8%	8%	10%
Personal computers	4%	5%	6%	9%	9%	10%	7%	6%	7%
eReaders, tablets	1%	1%	4%	4%	6%	4%	6%	3%	4%

B3: Preference for shopping brick-and-mortar channels

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Household food & drink	71%	60%	59%	69%	67%	67%	69%	67%	65%
Footwear	51%	42%	54%	45%	50%	49%	54%	52%	50%
Clothing	50%	43%	58%	41%	51%	44%	53%	49%	50%
Household cleaning & laundry	47%	46%	43%	55%	47%	41%	51%	35%	45%
Medicines and medical supplies	43%	43%	40%	38%	49%	43%	56%	33%	43%
Personal, hair, facial and skin care	38%	47%	41%	55%	43%	36%	47%	34%	42%
Furniture & home décor	44%	31%	41%	35%	36%	33%	39%	43%	38%
Sanitary care	18%	36%	20%	49%	39%	38%	48%	33%	33%
Cosmetics	25%	32%	28%	39%	32%	40%	40%	21%	32%
Household appliances	32%	26%	28%	28%	30%	26%	34%	31%	29%
Jewelry and watches	31%	22%	28%	20%	26%	20%	29%	25%	25%
Mobile phones	25%	23%	21%	16%	25%	22%	29%	26%	23%
Household consumer electrical items	26%	20%	26%	18%	19%	19%	28%	25%	23%
Personal computers	25%	21%	21%	19%	24%	20%	27%	23%	22%
Books	20%	23%	26%	19%	23%	18%	26%	20%	22%
eReaders, tablets	13%	12%	12%	10%	11%	9%	15%	15%	12%
Entertainment items	10%	13%	11%	9%	10%	9%	13%	9%	10%
Video gaming	7%	7%	6%	6%	7%	7%	11%	7%	7%

B4: Category motivators for brick-and-mortar channels

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Physically experiencing a product	69%	51%	69%	63%	63%	58%	70%	58%	63%
Can try things in store	64%	49%	57%	52%	56%	56%	59%	63%	57%
Speed of purchase	34%	46%	47%	26%	44%	46%	50%	44%	43%
It is easier to purchase things in person	31%	44%	38%	31%	30%	36%	29%	38%	35%
The experience of visiting a store in person	35%	29%	42%	38%	35%	23%	35%	31%	34%
Product return policy	31%	26%	32%	21%	20%	20%	36%	25%	27%
I trust physical stores more than online stores	27%	28%	23%	18%	23%	22%	30%	23%	24%
Payment methods available	13%	21%	20%	21%	23%	28%	31%	20%	22%
I like to shop with other people	16%	20%	18%	27%	32%	15%	17%	14%	19%

B5: Category barriers for brick-and-mortar channels

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Adhering to social distancing guidance and/or avoiding public interactions	27%	25%	48%	34%	32%	25%	38%	32%	34%
Lack of physical stores in my area	16%	22%	31%	42%	23%	23%	25%	24%	26%
Product selection/variety	20%	23%	24%	33%	24%	34%	22%	26%	25%
Inconvenience of visiting a physical store	18%	13%	31%	33%	22%	22%	29%	24%	25%
Lack of offers/discounts	17%	26%	18%	26%	35%	25%	30%	19%	24%
Parking	18%	15%	28%	28%	27%	25%	30%	14%	24%
Accessibility	18%	14%	12%	15%	11%	22%	16%	20%	16%

B6: Category motivators for online channels

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Home delivery	44%	47%	64%	66%	60%	64%	63%	42%	57%
It is easier to purchase things online	48%	38%	56%	44%	42%	42%	36%	43%	45%
Variety of products available	37%	32%	41%	41%	50%	48%	48%	43%	42%
Promotional offers	32%	42%	34%	13%	59%	46%	49%	39%	39%
Easier to compare products	34%	32%	35%	55%	40%	39%	31%	37%	37%
Adhering to social distancing guidance and/or avoiding public interactions	28%	17%	44%	32%	28%	15%	29%	22%	29%
Product details and descriptions	27%	16%	26%	24%	25%	34%	22%	28%	25%
Can try things in privacy at home	18%	9%	16%	27%	13%	15%	15%	19%	16%

B7: Category barriers for online channels

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Delivery charges	47%	45%	54%	43%	39%	39%	53%	42%	46%
Physically experiencing a product	51%	30%	50%	35%	39%	47%	55%	41%	44%
Can't try things	46%	40%	41%	35%	36%	43%	38%	44%	40%
Product return policy	41%	35%	46%	30%	33%	30%	47%	36%	38%
Delivery time	21%	28%	32%	27%	22%	26%	32%	25%	27%
Worries about personal information and data security	17%	30%	29%	19%	18%	32%	38%	18%	26%
Uncertainty of delivery	18%	25%	26%	23%	17%	20%	25%	19%	22%
Payment methods	12%	14%	9%	16%	13%	15%	20%	12%	13%
Lack of internet access/ quality of internet access	2%	5%	2%	3%	3%	4%	2%	3%	3%

B8: Interest in virtual reality and augmented reality

	Denmark	France	GB	Germany	Italy	Poland	Spain	Sweden	All
Sample size	**1024**	**1012**	**2113**	**1014**	**1015**	**1011**	**1064**	**1012**	**9265**
Clothes	31%	45%	28%	39%	51%	57%	49%	42%	41%
Technologies/home appliances	21%	25%	22%	25%	43%	44%	35%	33%	30%
Furniture	26%	25%	22%	23%	32%	30%	35%	36%	28%
None of these	24%	25%	43%	32%	13%	12%	15%	24%	26%
Video games	12%	13%	11%	11%	16%	17%	20%	18%	14%

North America: United Stated & Mexico

C1: Brick-and-mortar past 3 months channel product purchase incidence

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Household food & drink	71%	64%	66%
Household cleaning & laundry	63%	55%	58%
Personal, hair, facial and skin care	53%	48%	50%
Medicines and medical supplies	52%	41%	45%
Sanitary care	61%	25%	37%
Clothing	34%	29%	31%
Footwear	26%	16%	19%
Cosmetics	23%	15%	18%
Furniture & home décor	11%	11%	11%
Books	9%	10%	9%
Mobile phones	12%	6%	8%
Household consumer electrical items	6%	5%	6%
Jewelry and watches	7%	4%	5%
Entertainment items	5%	5%	5%
Household appliances	7%	4%	5%
Video gaming	4%	4%	4%
Personal computers	6%	3%	4%
eReaders, tablets	3%	2%	2%

C2: Online past 3 months channel product purchase incidence

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Clothing	38%	42%	41%
Personal, hair, facial and skin care	31%	36%	34%
Household food & drink	31%	34%	33%
Household cleaning & laundry	23%	29%	27%
Books	21%	28%	26%
Footwear	25%	24%	24%
Medicines and medical supplies	20%	23%	22%
Sanitary care	26%	14%	18%
Entertainment items	15%	17%	17%
Cosmetics	18%	14%	15%
Furniture & home décor	14%	13%	13%
Video gaming	13%	13%	13%
Mobile phones	16%	10%	12%
Household consumer electrical items	13%	9%	10%
Jewelry and watches	10%	9%	10%
Personal computers	9%	8%	8%
Household appliances	10%	6%	7%
eReaders, tablets	7%	4%	5%

C3: Preference for shopping brick-and-mortar channels

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Household food & drink	67%	59%	61%
Clothing	58%	49%	52%
Footwear	59%	45%	49%
Household cleaning & laundry	50%	44%	46%
Personal, hair, facial and skin care	47%	42%	43%
Medicines and medical supplies	46%	40%	42%
Furniture & home décor	35%	40%	39%
Household appliances	27%	37%	33%
Sanitary care	48%	24%	32%
Mobile phones	33%	26%	28%
Cosmetics	33%	24%	27%
Household consumer electrical items	25%	27%	26%
Personal computers	27%	24%	25%
Jewelry and watches	24%	23%	23%
Books	24%	20%	21%
Entertainment items	12%	14%	14%
eReaders, tablets	10%	12%	12%
Video gaming	10%	10%	10%

C4: Category motivators for brick-and-mortar channels

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Physically experiencing a product	71%	62%	65%
Can try things in store	59%	50%	53%
Speed of purchase	55%	50%	52%
It is easier to purchase things in person	37%	38%	37%
The experience of visiting a store in person	43%	31%	35%
Product return policy	32%	32%	32%
Payment methods available	43%	24%	30%
I trust physical stores more than online stores	30%	23%	25%
I like to shop with other people	19%	12%	14%

C5: Category barriers for brick-and-mortar channels

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Adhering to social distancing guidance and/or avoiding public interactions	42%	40%	41%
Inconvenience of visiting a physical store	29%	34%	32%
Lack of physical stores in my area	33%	24%	27%
Lack of offers/discounts	38%	21%	27%
Product selection/variety	20%	29%	26%
Parking	30%	19%	22%
Accessibility	22%	11%	14%

C6: Category motivators for online channels

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Home delivery	69%	56%	60%
It is easier to purchase things online	43%	52%	49%
Variety of products available	45%	42%	43%
Promotional offers	49%	32%	37%
Adhering to social distancing guidance/ avoid public interactions	37%	33%	34%
Easier to compare products	26%	31%	30%
Product details and descriptions	22%	26%	24%
Can try things in privacy at home	12%	13%	13%

C7: Category barriers for online channels

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Physically experiencing a product	58%	45%	49%
Delivery charges	49%	48%	48%
Can't try things	44%	40%	41%
Product return policy	45%	38%	40%
Delivery time	45%	36%	39%
Worries about personal information and data security	51%	33%	39%
Uncertainty of delivery	30%	24%	26%
Payment methods	28%	14%	19%
Lack of internet access/quality of internet access	3%	5%	4%

C8: interest in virtual reality and augmented reality

	Mexico	US	All
Sample size	**1069**	**2251**	**3320**
Clothes	60%	27%	38%
Technologies/home appliances	51%	22%	32%
None of these	10%	37%	28%
Furniture	39%	23%	28%
Video games	27%	18%	21%

MENA Region: United Arab Emirates

D1: Brick-and-mortar past 3 months channel product purchase incidence

	United Arab Emirates
Sample size	**1005**
Household food & drink	45%
Personal, hair, facial and skin care	38%
Household cleaning & laundry	37%
Clothing	35%
Medicines and medical supplies	32%
Sanitary care	31%
Footwear	28%
Cosmetics	26%
Mobile phones	18%
Jewelry and watches	14%
Furniture & home décor	13%
Personal computers	11%
Books	10%
Household consumer electrical items	9%
Household appliances	8%
Video gaming	6%
Entertainment items	5%
eReaders, tablets	5%

D2: Online past 3 months channel product purchase incidence

	United Arab Emirates
Sample size	**1005**
Household food & drink	39%
Clothing	32%
Personal, hair, facial and skin care	31%
Household cleaning & laundry	25%
Cosmetics	22%
Footwear	22%
Medicines and medical supplies	22%
Sanitary care	21%
Mobile phones	20%
Jewelry and watches	12%
Personal computers	12%
Books	12%
Furniture & home décor	11%
Entertainment items	10%
Household consumer electrical items	9%
Video gaming	9%
Household appliances	7%
eReaders, tablets	7%

D3: Preference for shopping brick-and-mortar channels

	United Arab Emirates
Sample size	**1005**
Clothing	42%
Household food & drink	40%
Footwear	39%
Personal, hair, facial and skin care	36%
Medicines and medical supplies	34%
Mobile phones	33%
Sanitary care	30%
Cosmetics	30%
Household cleaning & laundry	30%
Jewelry and watches	29%
Personal computers	26%
Furniture & home décor	23%
Household consumer electrical items	22%
Household appliances	20%
Books	15%
Entertainment items	11%
eReaders, tablets	10%
Video gaming	9%

D4: Category motivators for brick-and-mortar channels

	United Arab Emirates
Sample size	**1005**
Physically experiencing a product	52%
Speed of purchase	41%
Can try things in store	39%
It is easier to purchase things in person	39%
Product return policy	38%
Payment methods available	35%
I trust physical stores more than online stores	32%
The experience of visiting a store in person	32%
I like to shop with other people	17%

D5: category barriers for brick-and-mortar channels

	United Arab Emirates
Sample size	**1005**
Adhering to social distancing guidance and/or avoiding public interactions	38%
Lack of offers/discounts	33%
Parking	29%
Product selection/variety	27%
Inconvenience of visiting a physical store	26%
Lack of physical stores in my area	23%
Accessibility	19%
I like to shop with other people	17%

D6: Category motivators for online channels

	United Arab Emirates
Sample size	**1005**
Home delivery	54%
It is easier to purchase things online	39%
Promotional offers	37%
Easier to compare products	33%
Variety of products available	31%
Product details and descriptions	30%
Adhering to social distancing guidance and/or avoiding public interactions	28%
Can try things in privacy at home	18%

D7: Category barriers for online channels

	United Arab Emirates
Sample size	**1005**
Product return policy	44%
Physically experiencing a product	40%
Worries about personal information and data security	38%
Delivery charges	38%
Delivery time	32%
Payment methods	27%
Uncertainty of delivery	25%
Can't try things	24%
Lack of internet access / quality of internet access	8%

D8: Interest in virtual reality and augmented reality

	United Arab Emirates
Sample size	**1005**
Clothes	53%
Technologies/home appliances	46%
Furniture	34%
Video games	23%
None of these	9%

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ABOUT YOUGOV

YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities for our customer base that includes media owners, brands and media agencies. We work with some of the world's most recognised brands.

Our line of products and services include YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With 15 million panellists in more than 55 countries, YouGov's market research covers in GB, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panellists come from all ages, socio-economic groups, and other demographic types – allowing us to create representative samples of whole populations and different sections of society.

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