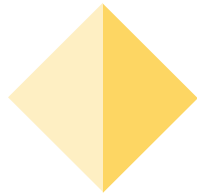


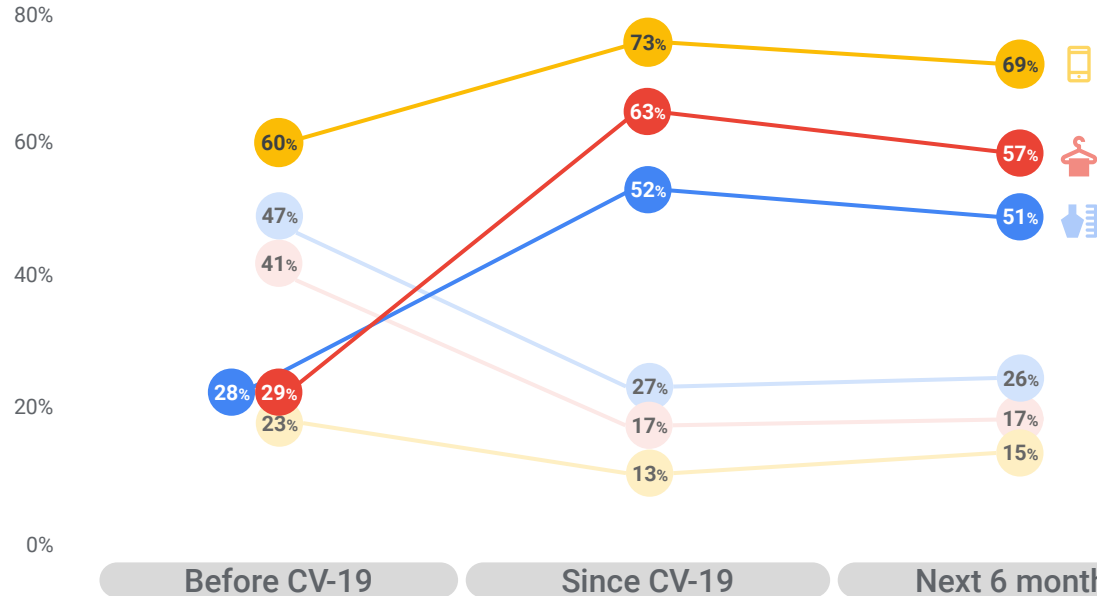
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The Shift in Shopping



The shift in shopping

% shopping or expecting to shop via online vs in-store



Mostly / always online

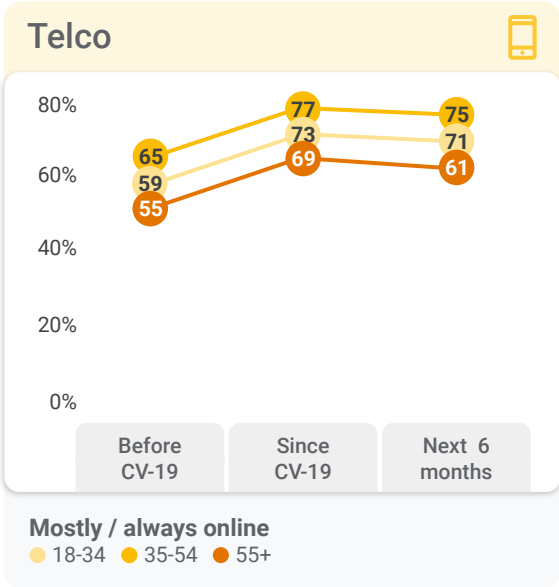
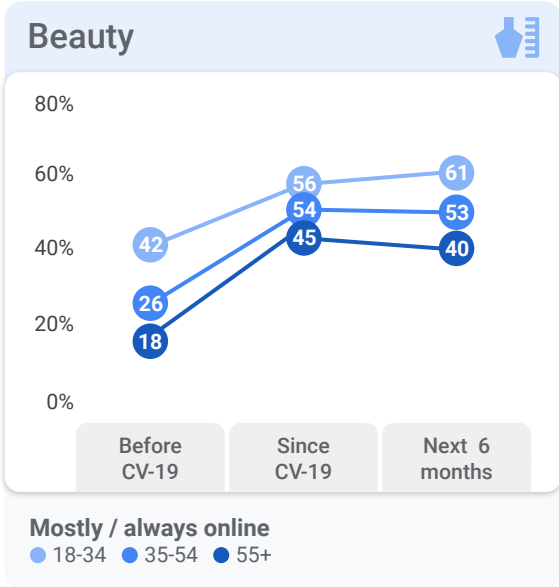
● Beauty ● Fashion ● Telco

Mostly / always in-store

● Beauty ● Fashion ● Telco



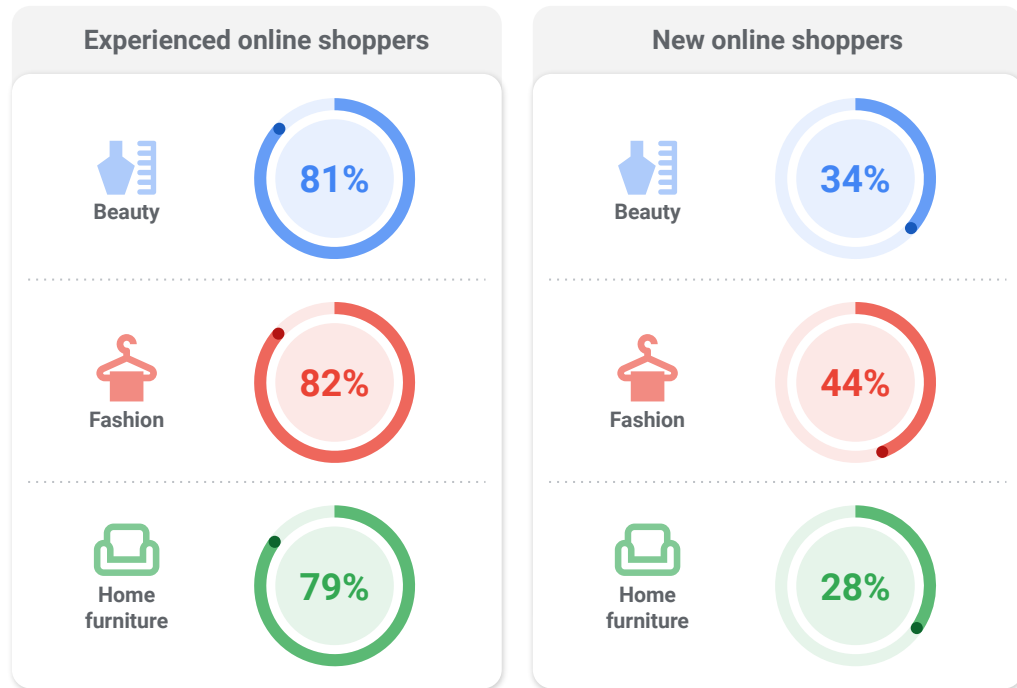
The shift in shopping is consistent across age groups



Source: Google / Trinity McQueen, January 2021, UK, n=1000 consumers per category

The shift is evident even in those who are new to online

Expecting to shop always/mostly online the in next 6 months



Source: Google / Trinity McQueen, January 2021, UK, n=1000 consumers per category

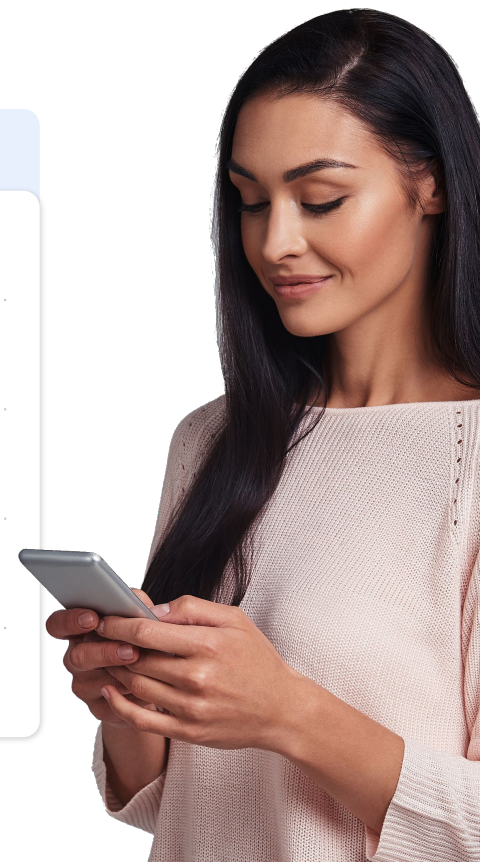
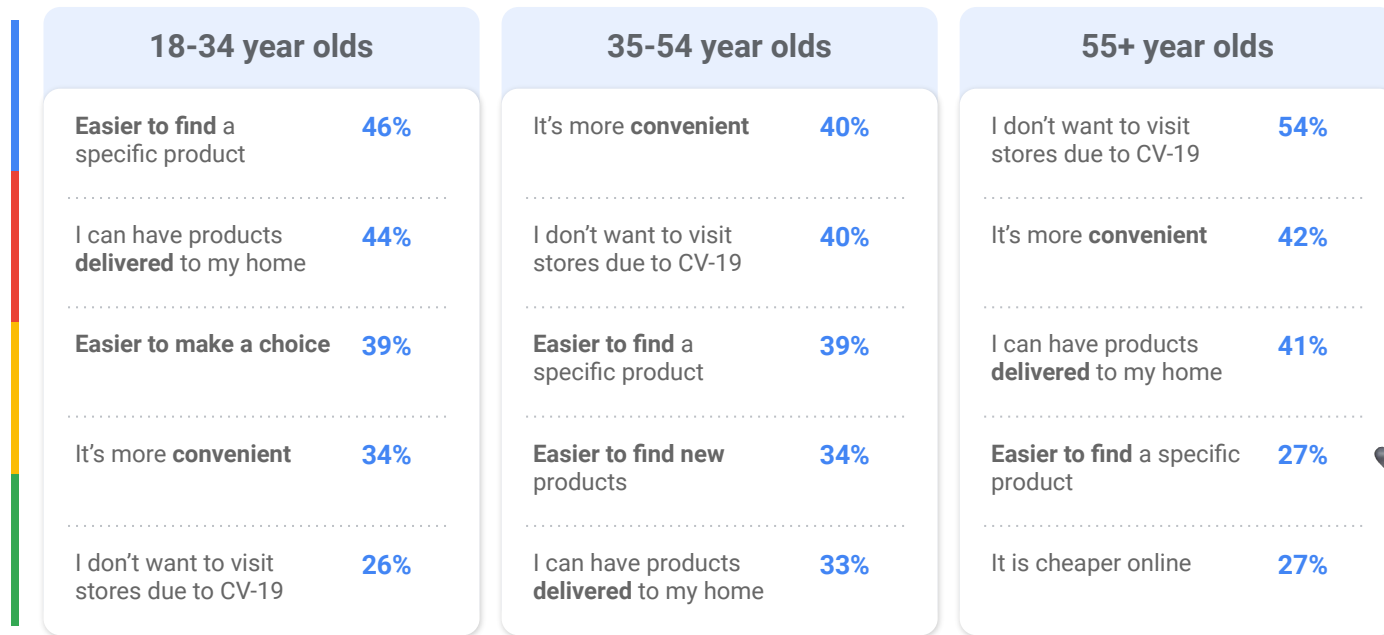


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Whilst CV-19 has closed stores, it is not why people are choosing to shop online



Top 5 reasons that beauty shoppers shop online:



Whilst CV-19 has closed stores, it is not why people are choosing to shop online

Reasons for shopping online for mobile in the next 6 months



Easier to compare between different phones 50

Easier to make a choice 47

Easier to compare between different phone plans 39

It's more convenient than in store 39

Easier to find a specific product 38

Information conveniently accessible 33

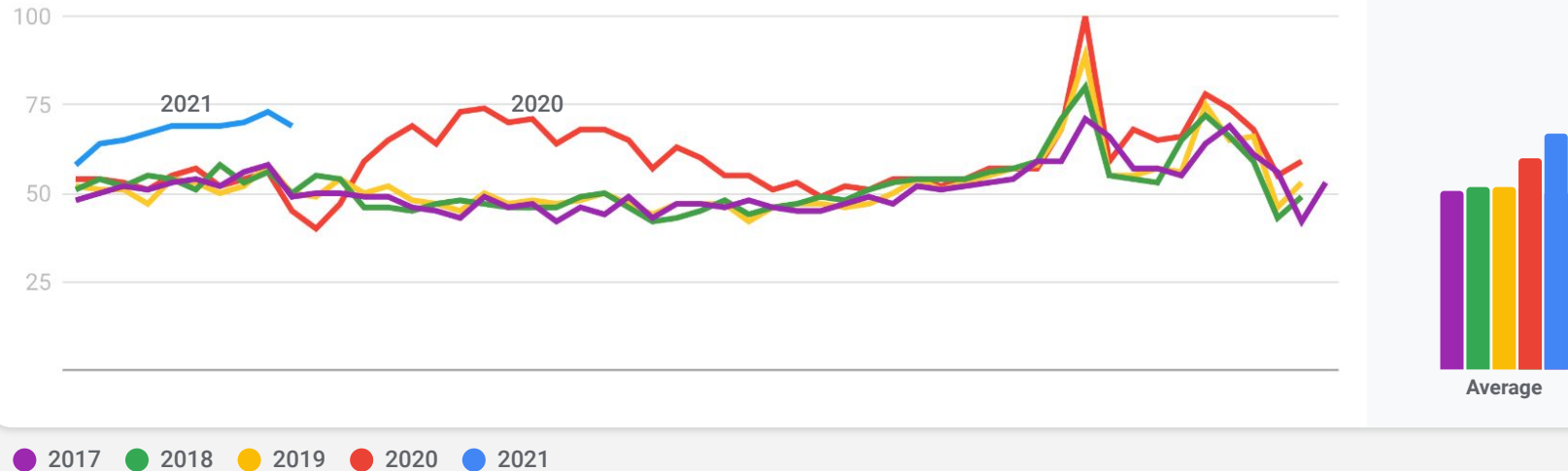
Products can be delivered to home 29

Avoiding stores as worried about CV-19 29



The search for ideas and inspiration is moving online

Ideas (UK)

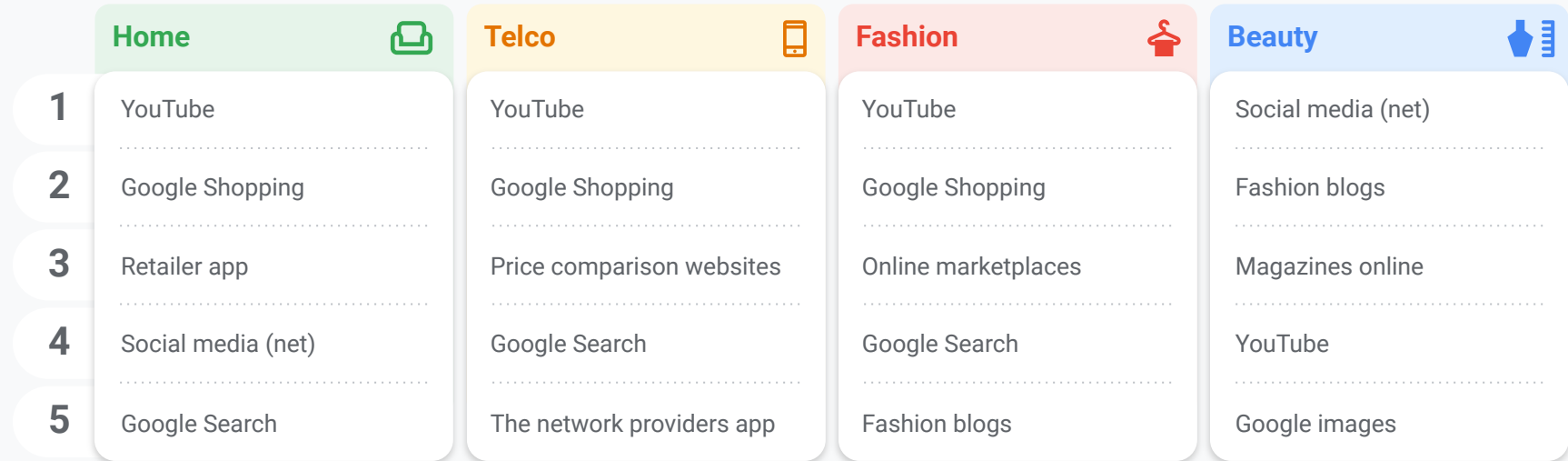


Window shopping has moved online

And many consumers are shopping visually, for both inspiration and for help with making a choice.

Online sources which are more important since CV-19

(Ranked top 5 most important by category)



Source: Google / Trinity McQueen, January 2021, UK, n=1000 consumers per category.

*Social media (net) = Facebook, Instagram, TikTok, Pinterest and other social media networks but does not include YouTube

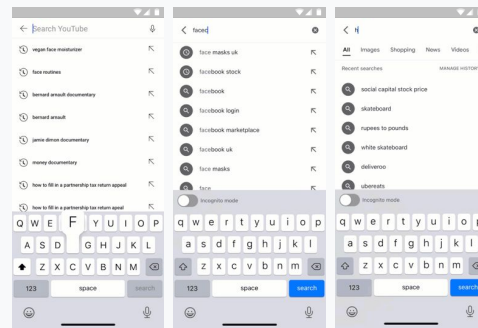
Consumers are increasingly in a constant state of discovery

Then



People used to carve out time specifically for **discovery**

Now



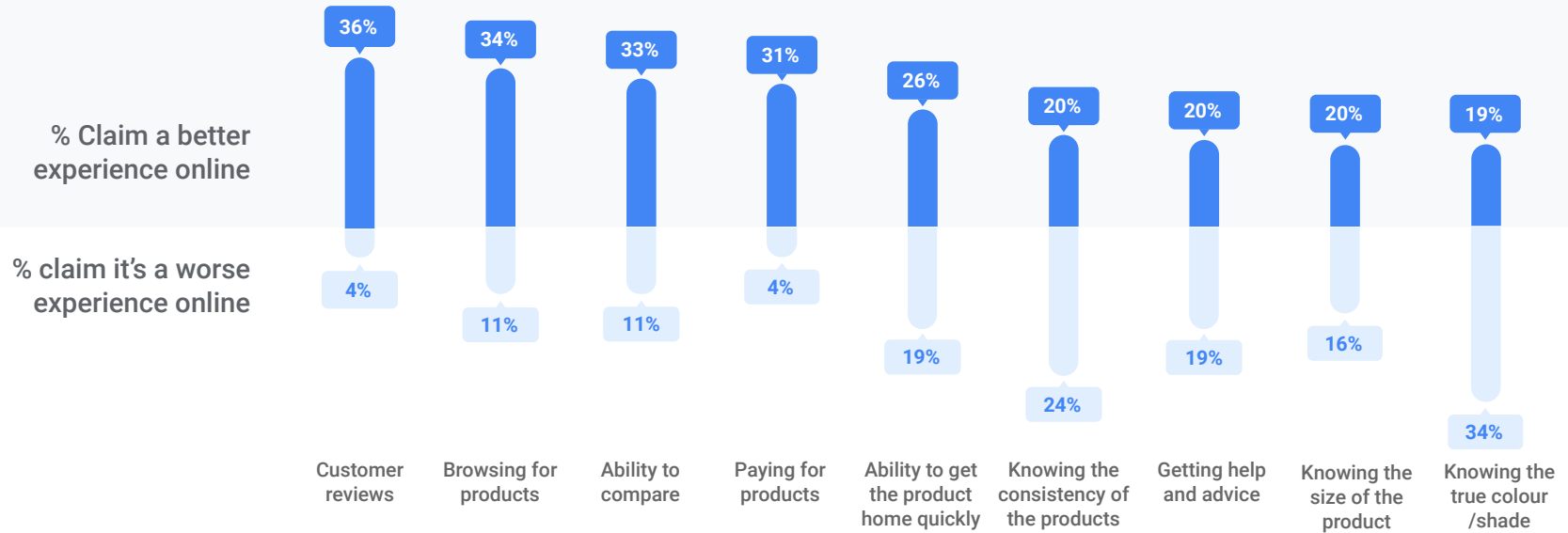
In a state of **constant discovery**

85%

of online consumers will take a product-related action within **24 hours of discovering a product** that meets their needs.¹

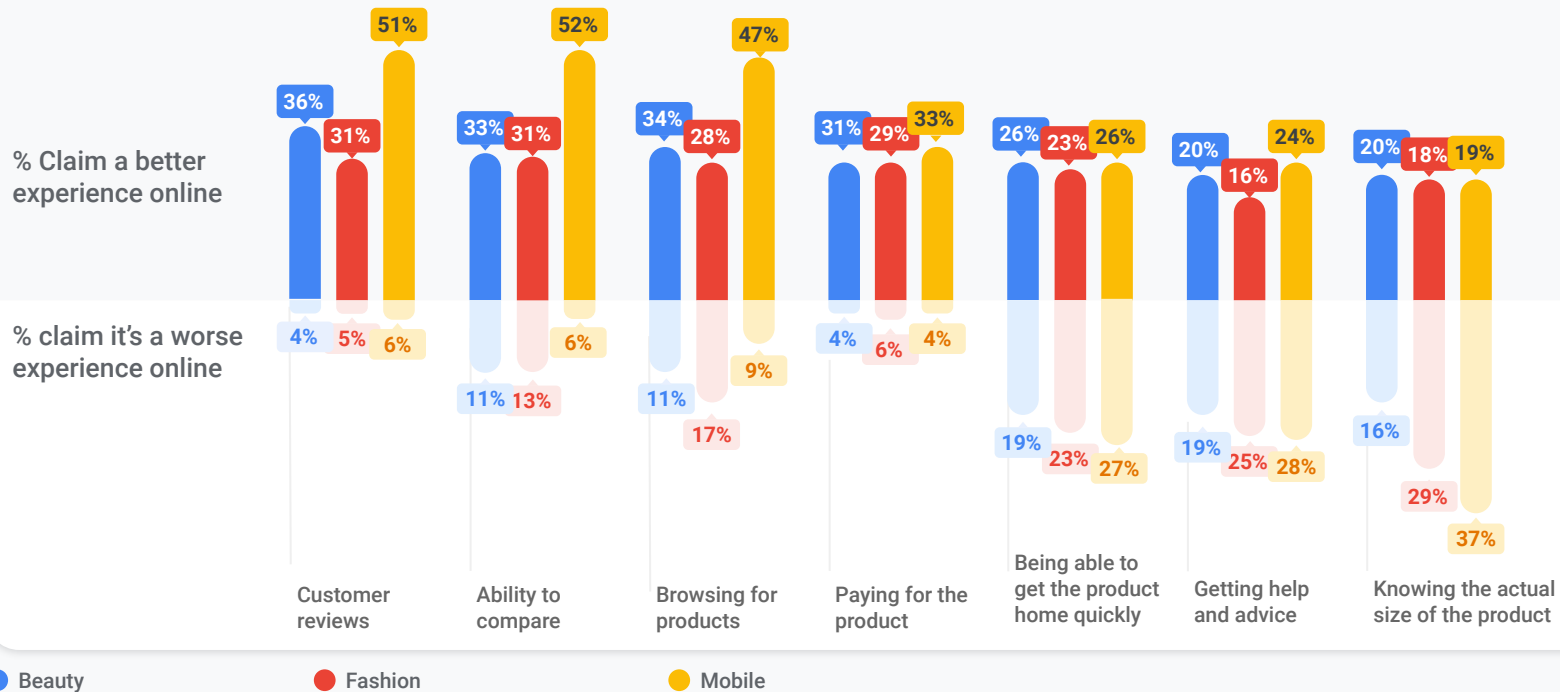
Online and instore offer complimentary experiences

Aspects of beauty shopping experience that are better or worse online vs in-store



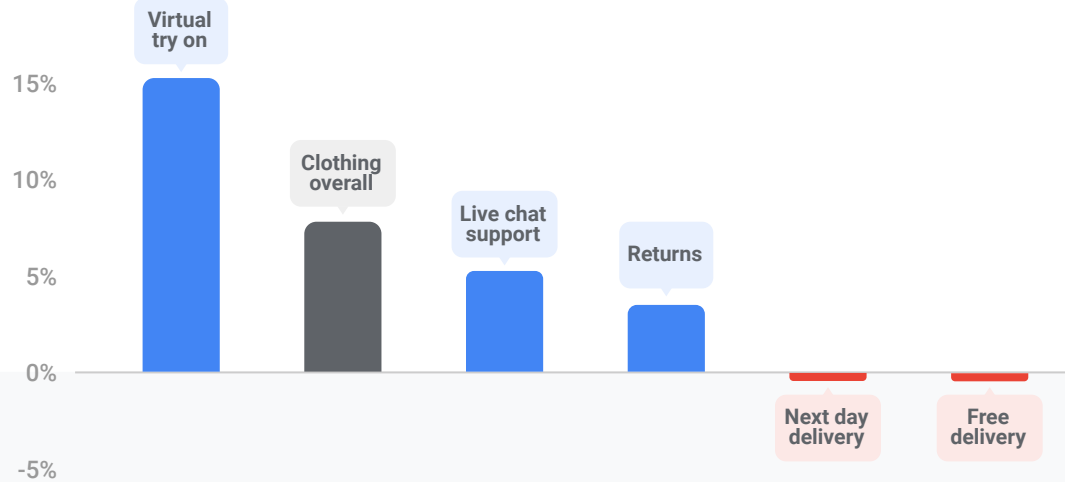
Unequal experience perception is cross-category

Aspects of shopping experience that are better or worse online vs in-store

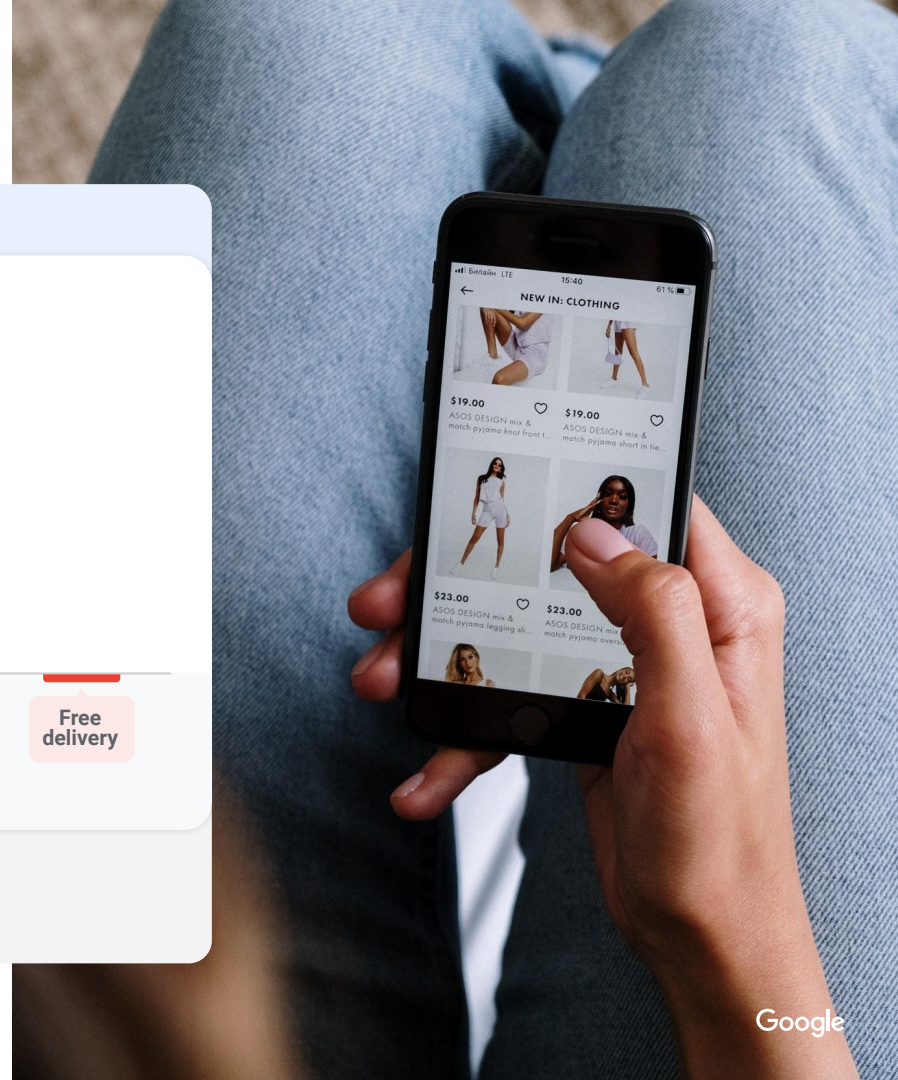


Accelerated online expectations

YoY growth vs query set - Clothing

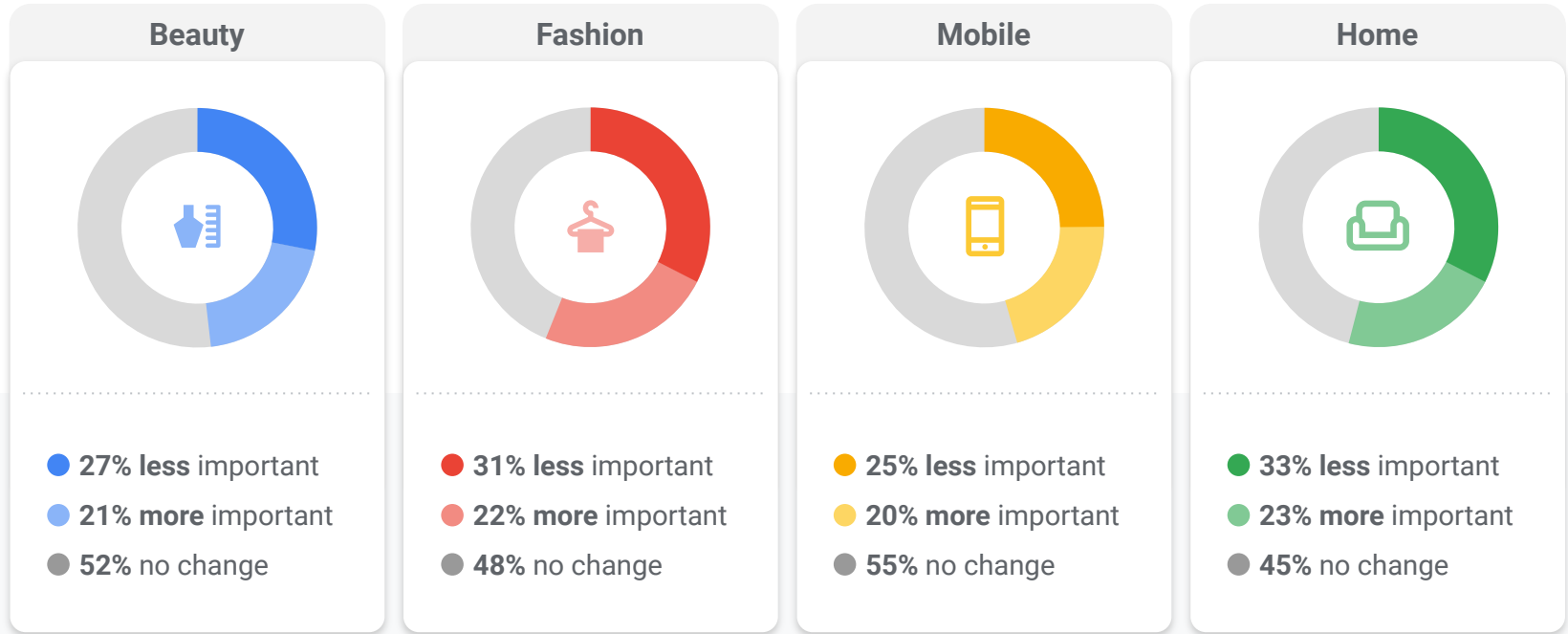


As customers shop more online, their expectations of the experience and services offered have increased.



Importance of omnichannel remains

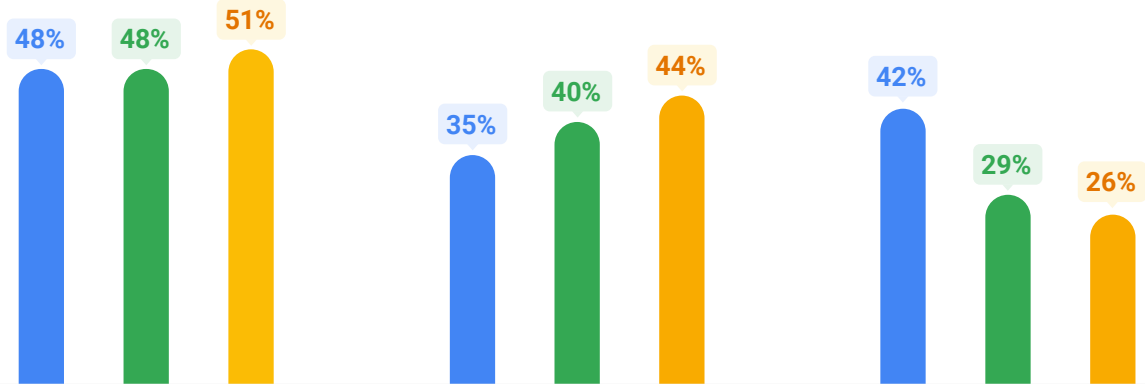
Importance of in-store shopping



Age groups preferring different locations post-Covid



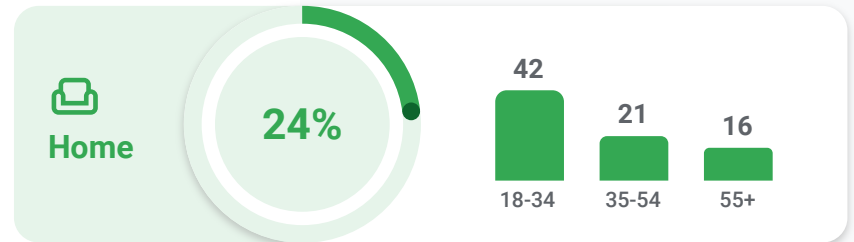
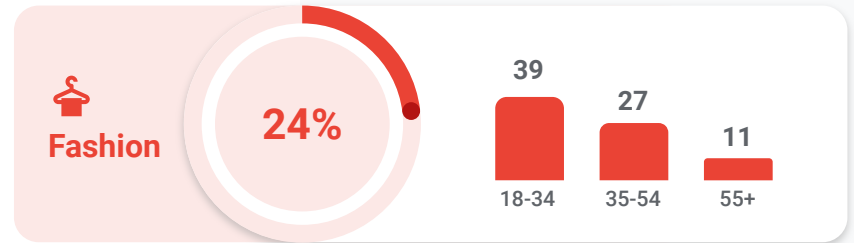
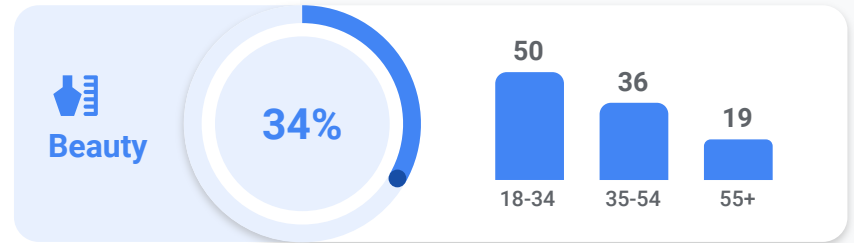
Location preference of in-store shopping for clothing by demo



● 18-34 ● 35-54 ● 55+

With many spending increasing amounts of time shopping online, they are finding the time to discover and trial new brands or retailers

Trial of new brands/retailers since March 2020



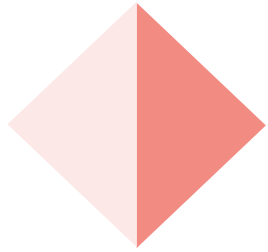
Implications

- 1 Digital Inspiration**

Show up in the places where customers are looking for inspiration
- 2 Customer Strategy**

Focus on acquiring and retaining the highest value customers
- 3 Channel Integration**

Understand and act on the way online discovery is impacting offline sales



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Thanks

