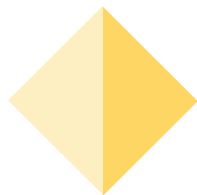


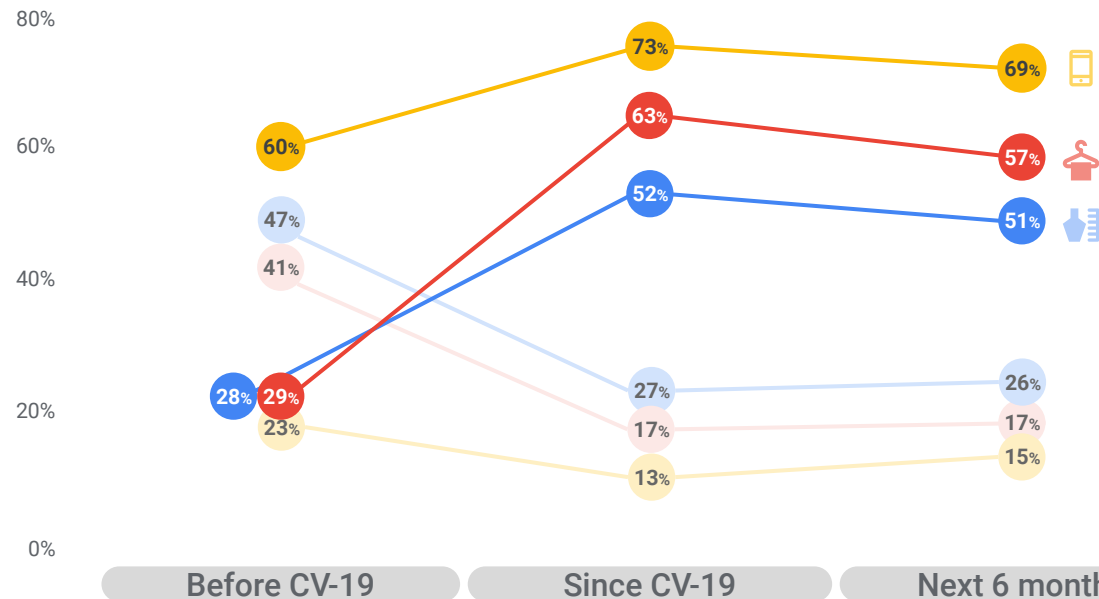
Google TRINITY
MQUEEN

The Shift in Shopping



The shift in shopping

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



Mostly / always online

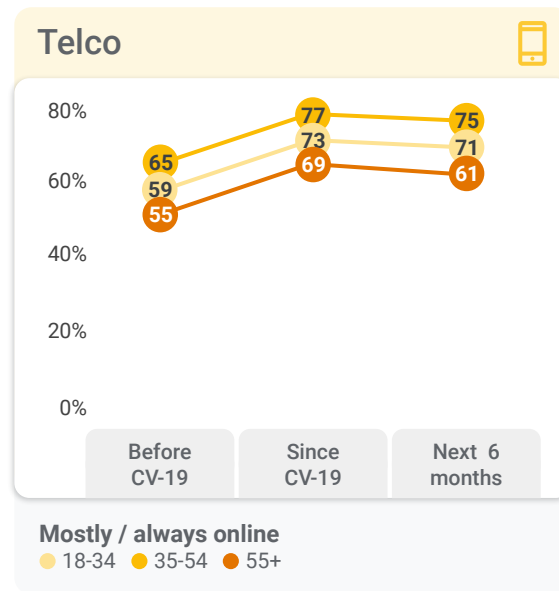
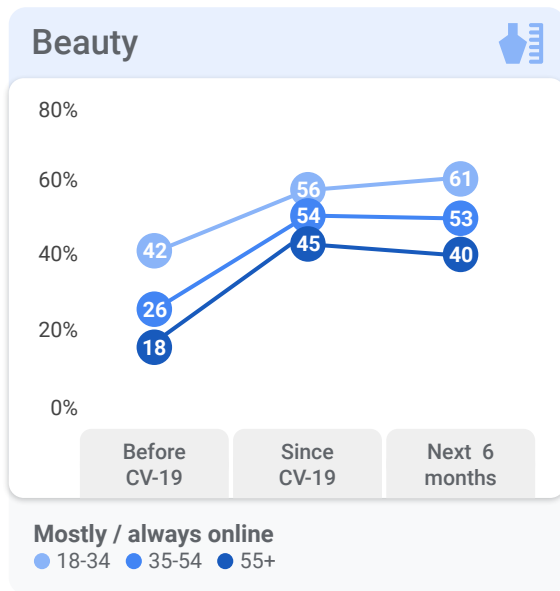
● Beauty ● Fashion ● Telco

Mostly / always in-store

● Beauty ● Fashion ● Telco

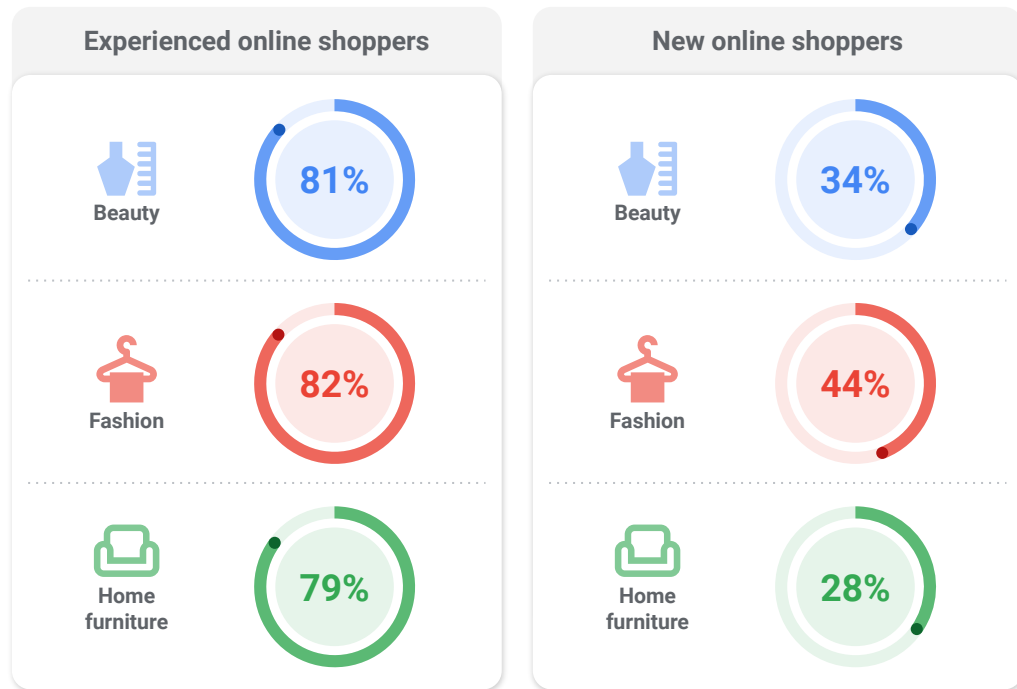


The shift in shopping is consistent across age groups



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



Google

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



Top 5 reasons that beauty shoppers shop online:

18-34 year olds

Easier to find a specific product 46%

I can have products delivered to my home 44%

Easier to make a choice 39%

It's more convenient 34%

I don't want to visit stores due to CV-19 26%

35-54 year olds

It's more convenient 40%

I don't want to visit stores due to CV-19 40%

Easier to find a specific product 39%

Easier to find new products 34%

I can have products delivered to my home 33%

55+ year olds

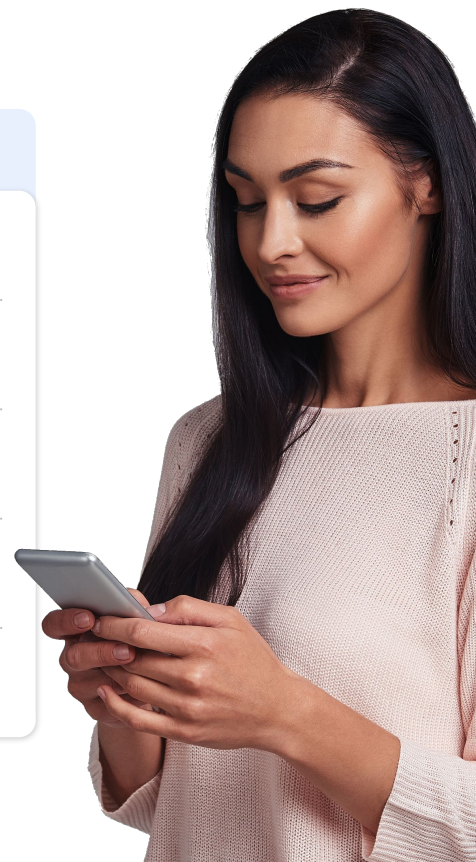
I don't want to visit stores due to CV-19 54%

It's more convenient 42%

I can have products delivered to my home 41%

Easier to find a specific product 27%

It is cheaper online 27%



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

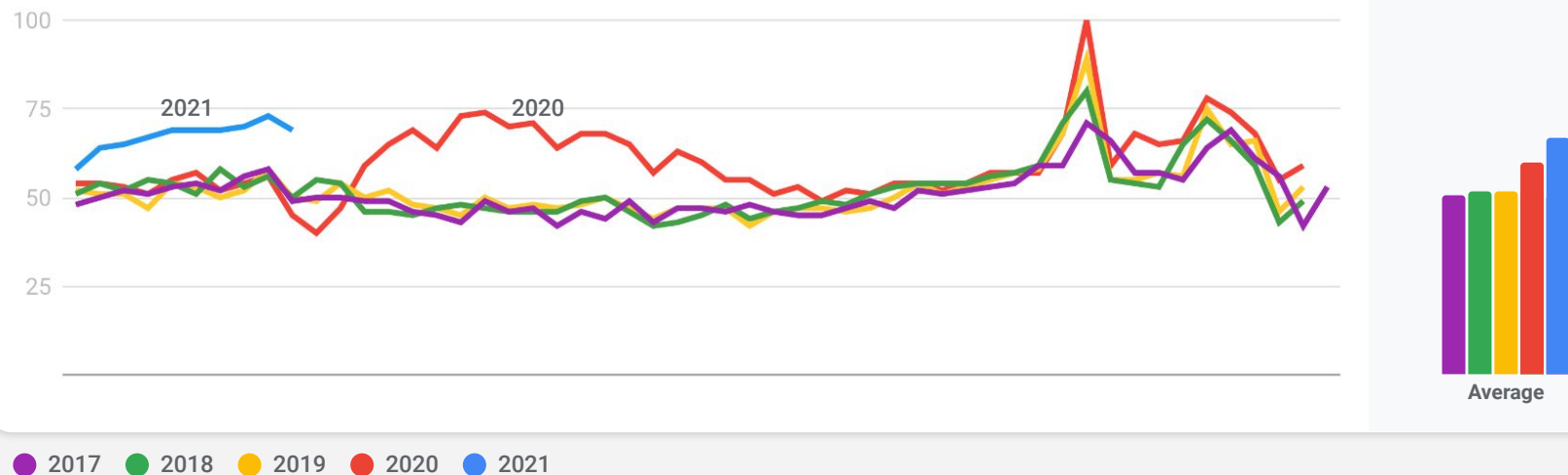
Information conveniently accessible 33

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)

	Home 	Telco 	Fashion 	Beauty 
1	YouTube	YouTube	YouTube	Social media (net)
2	Google Shopping	Google Shopping	Google Shopping	Fashion blogs
3	Retailer app	Price comparison websites	Online marketplaces	Magazines online
4	Social media (net)	Google Search	Google Search	YouTube
5	Google Search	The network providers app	Fashion blogs	Google images

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

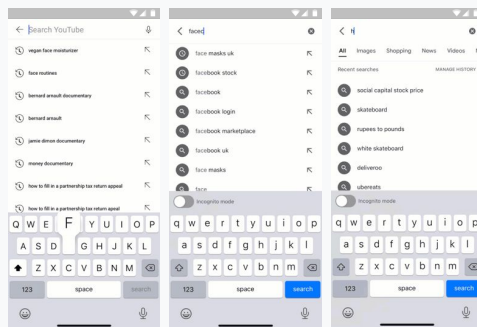
Consumers are increasingly in a constant state of discovery

Then



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

Now



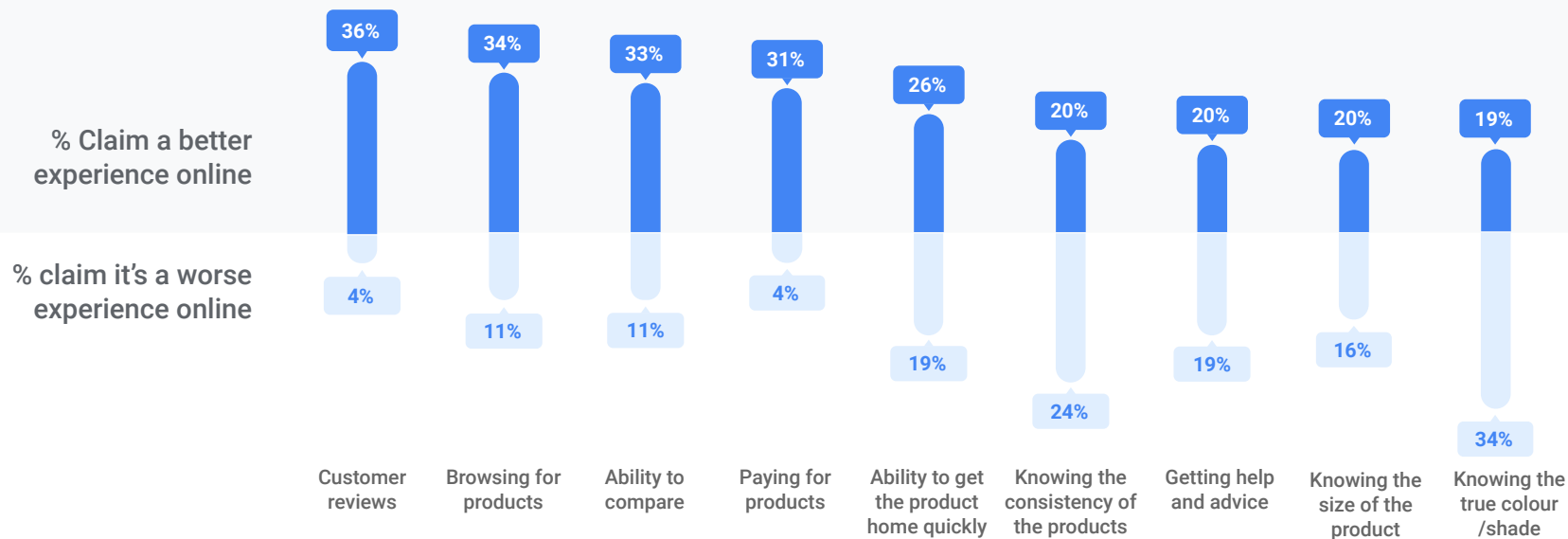
In a state of **constant discovery**

85%

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

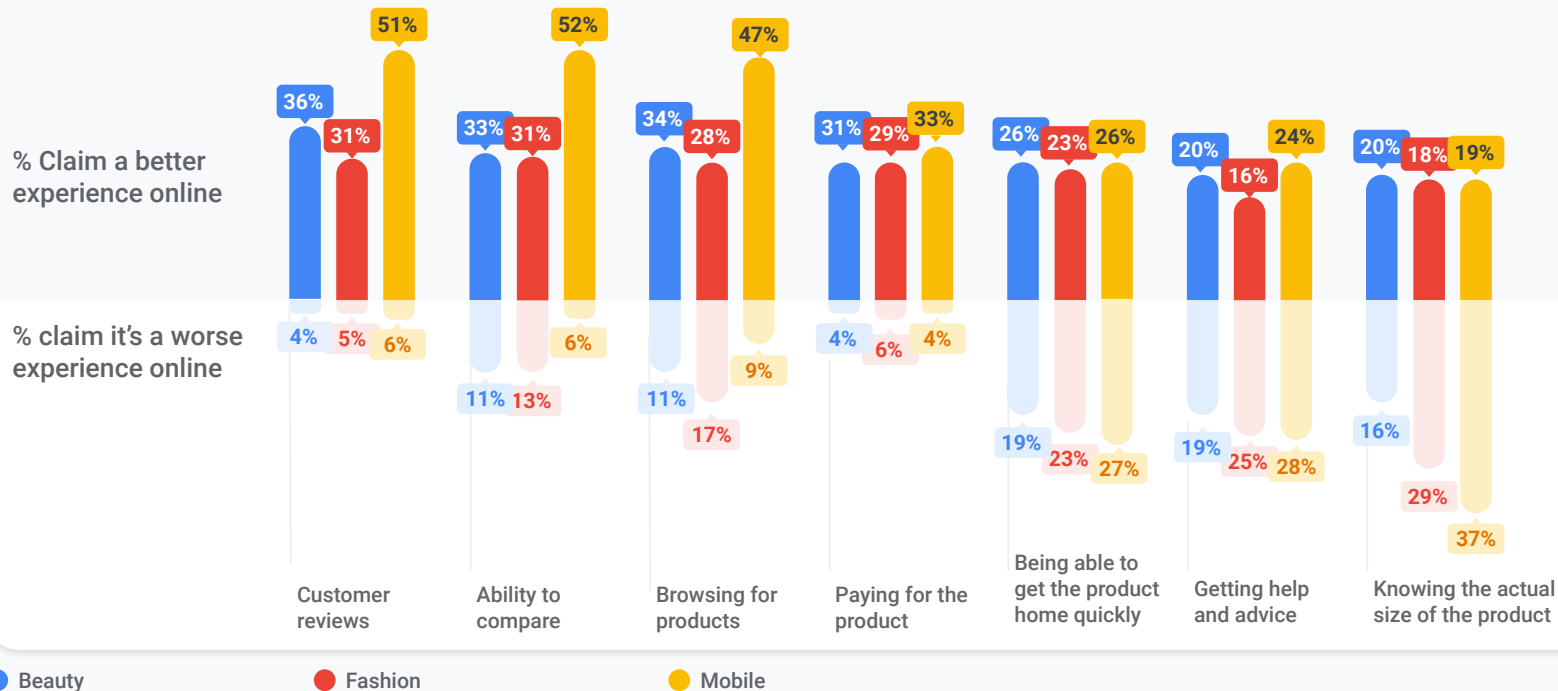
Online and instore offer complimentary experiences

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



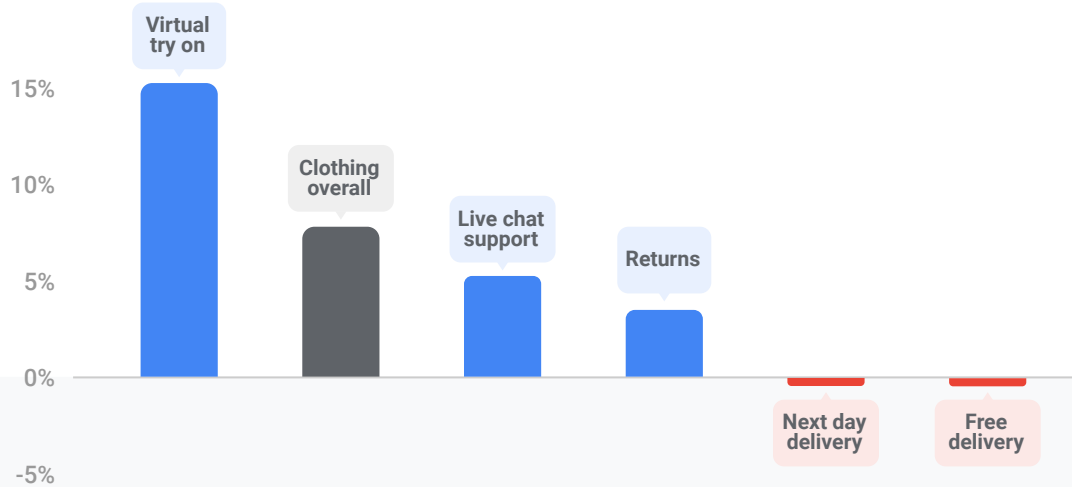
Unequal experience perception is cross-category

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

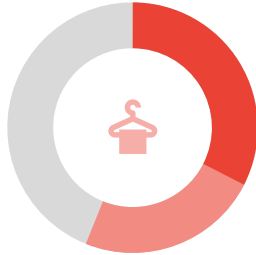
Importance of in-store shopping

Beauty



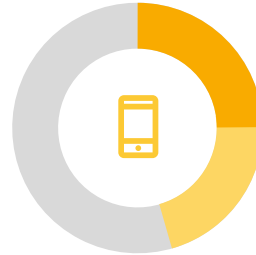
- 27% **less** important
- 21% **more** important
- 52% no change

Fashion



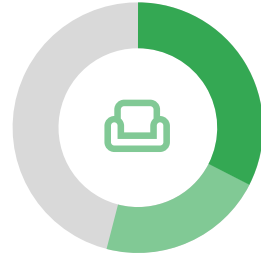
- 31% **less** important
- 22% **more** important
- 48% no change

Mobile



- 25% **less** important
- 20% **more** important
- 55% no change

Home

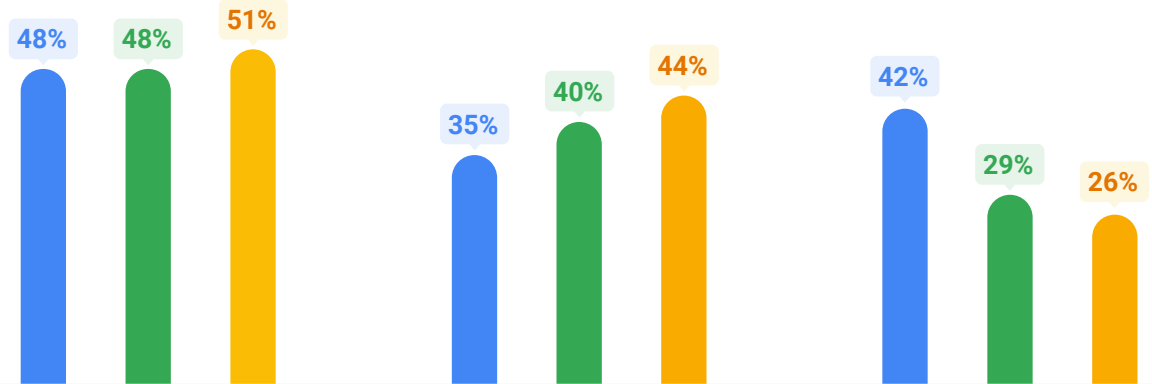


- 33% **less** important
- 23% **more** important
- 45% no change

Age groups preferring different locations post-Covid



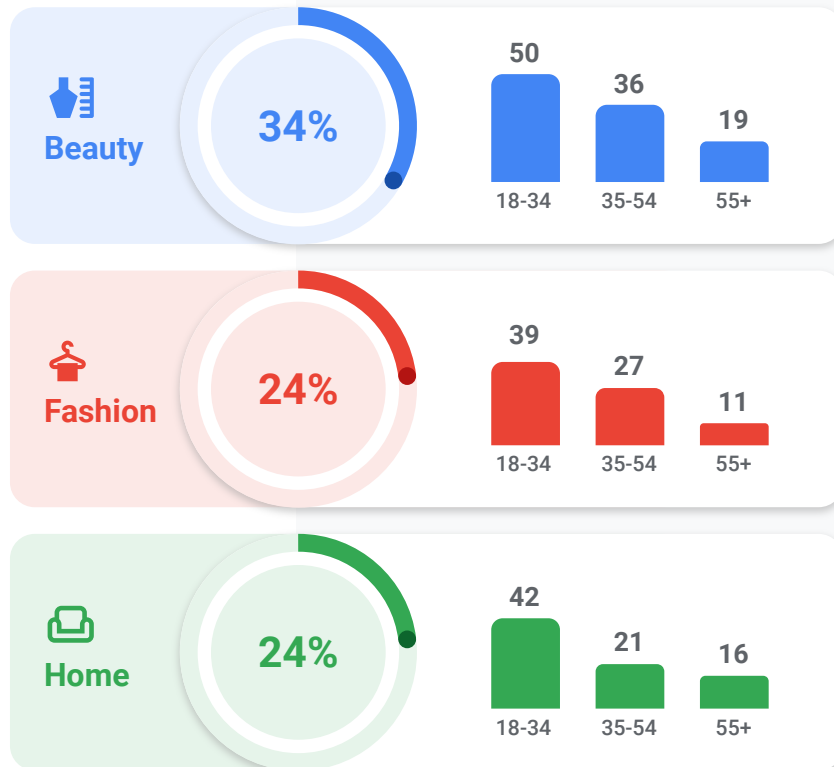
Location preference of in-store shopping for clothing by demo



● 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

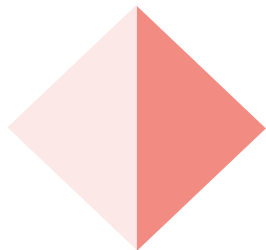
Customer Strategy

Focus on acquiring and retaining the highest value customers

3

Channel Integration

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



Google TRINITY
MQUEEN

Thanks

