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Consumers prefer online, in-store for different situations: YouGov

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There are several motivational factors for in-store shopping. Image credit: National Retail Federation

By SARAH RAMIREZ

While the COVID-19 pandemic spurred exponential growth in ecommerce sales, most consumers around the globe still prefer to shop at bricks-and-mortar stores.

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According to YouGov's "[International Omnichannel Retail Report 2021](#)," pandemic-related regulations have influenced how accessible nonessential goods are at physical stores. While most consumers are shopping online and in-store, ecommerce is most likely to be the preferred channel for discretionary purchases.

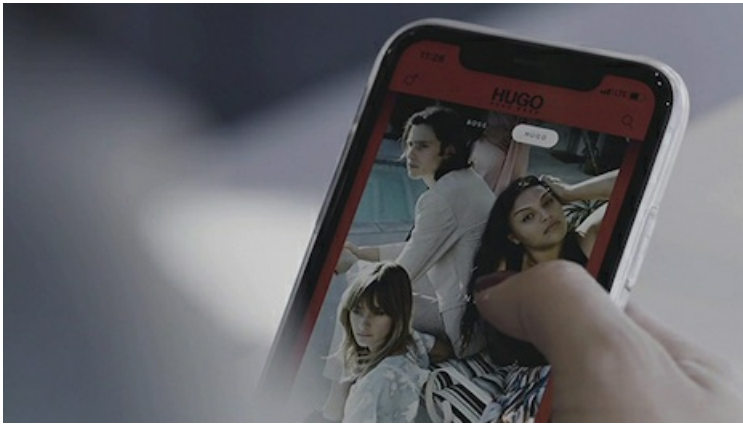
"It was striking to see that, despite the huge online retail boom during the pandemic, bricks-and-mortar retail is still more popular in many categories for example textiles and clothing and therefore has a great chance of rebounding; it is just a question of when," said Adam Guiney, director of customer experience at [YouGov](#), Minneapolis. "Our study aims to help outlets and brands understand the dynamics of the retail sector, which has never been shaken as much as it has been during the past year."

The whitepaper is based on surveys of adult consumers in 17 global markets, with sample sizes between 500 and 2,260 respondents. Surveys were completed between Jan. 11 and Feb. 22, 2021, with consumers reflecting on their shopping behaviors and attitudes over the previous three months.

Channel duality

In both mature and emerging markets, consumers are drawn to bricks-and-mortar and online channels at high numbers but generally, ecommerce still lags physical retail in terms of market penetration.

Of the 17 markets YouGov analyzed, bricks-and-mortar had higher penetrations the incidence of whether consumers completed purchases online or offline than online retail, with the exceptions of Great Britain and China.



Apparel has one of the largest penetration gaps when comparing online and offline purchases. Image credit: Hugo Boss

Global penetration for offline channels averaged 86 percent, while online channels averaged 81 percent. China had the highest online penetration at 91 percent, followed by Great Britain at 86 percent.

Both markets had stricter government restrictions during the COVID-19 pandemic, which much of Britain's nonessential retail shuttered in the late fall and winter months. Meanwhile, Australian consumers gravitated towards physical stores as they lived with fewer restrictions and more contained COVID-19 outbreaks.

Even in the most polarized markets, consumer behavior is more complex than a question of online or offline.

About three-quarters of global respondents participate in "dual-channel" behavior, shopping both in-stores and online.

Bricks-and-mortar tends to be the preferred channel for essentials such as food, medicine, drinks, cleaning supplies and even cosmetics and personal care products while discretionary spending on books, clothing, footwear, appliances, electronics, jewelry and more tends to happen online.



Cosmetics are one discretionary category where physical retail still has an edge. Image credit: Este Lauder

Clothing has a penetration gap of 12 points between online and offline purchasing, while the footwear and jewelry and watch categories have respective gaps of 6 and 4 points, respectively. Cosmetics, excluding facial and skin care, has a penetration gap of just 2 points in favor of bricks-and-mortar.

YouGov's findings also show that women have stronger preferences towards online retail purchases than men, including both essential and discretionary products. Age-wise, penetration is high among both channels, though different age groups gravitate towards different categories.

Benefits and barriers

Depending on the context and consumers' needs, some ecommerce benefits can turn into barriers. For instance, while online shopping offers the convenience of not having to physically visit and browse a store or several, the shipping time may turn into a drawback if a consumer has immediate needs.

Other barriers to ecommerce purchasing are physically experiencing products and trying things in-store, as cited by a respective 45 percent and 38 percent of consumers. Comparatively, physically experiencing products and the ability to try things in-store are cited by 62 and 53 percent of respondents, respectively, as reasons they shop bricks-and-mortar.

According to recent research from Bazaarvoice, consumers are allured by the convenience, ease and greater product choice offered by online shopping. More consumers are showing a preference for online shopping, with 61 percent of global consumers more likely to browse for new products online compared to in-store, while 64 percent and 54 percent of consumers find online shopping easier and more enjoyable, respectively ([see story](#)).

Per another report from software platform SOTI, shoppers are more comfortable with retailers that balance convenience with security. Top priorities for consumers including visibility of product shipping, easier returns processes and expanded in-store safety features ([see story](#)).

"Understanding consumer needs and the interplay between bricks-and-mortar and online retail in meeting those needs will be key for brands and retailers to identify potential, overcome barriers and focus on opportunities," YouGov's Mr. Guiney said.

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