



In-Store Customer Trends Report:

Turning Insights

Into Inspiration

MOOD:MEDIA™

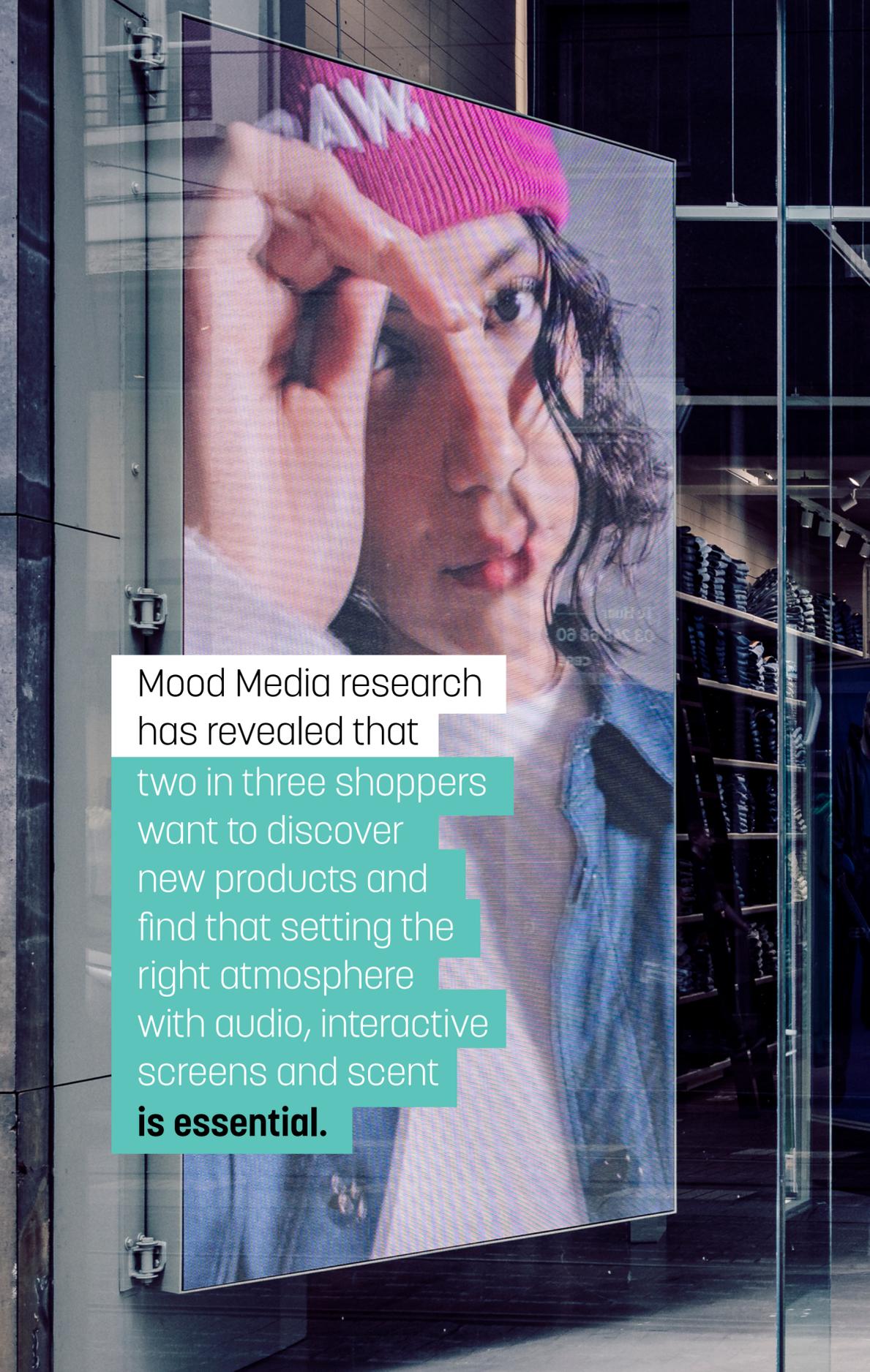


Foreword

Retail has evolved beyond location and merchandising into an experience deepening the connection between customers, stores, and brands. This year's Mood Media's annual research study delves into in-store trends around consumer behavior and technology.

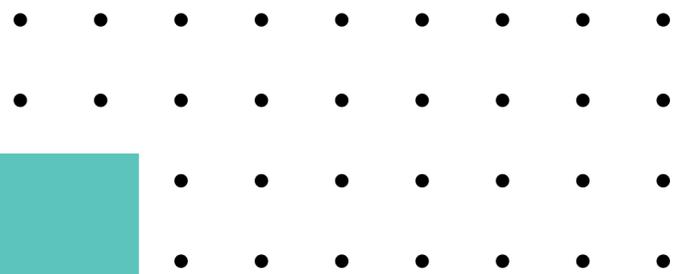
This year's key insight reveals a prime opportunity for retailers using technology to drive customer engagement. **Two in three shoppers enter stores without specific plans and actively seek inspiration.** By incorporating technology like digital screens and QR codes, retailers can showcase their full product range and personalization options while providing the inspiration consumers crave.

Our In-Store Trends report consolidates these insights, offering businesses a guide to navigating changing consumer sentiments and fostering a stronger emotional connection between shoppers and retailers.



Mood Media research has revealed that two in three shoppers want to discover new products and find that setting the right atmosphere with audio, interactive screens and scent **is essential.**

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Inspiration activates action

Our researchers looked to understand what activates consumer behavior to stay in a store for longer, make a purchase, and return – especially as footfall returns. **Shoppers seek social experiences and instant gratification; two-thirds are eager for fresh inspiration and are open to new product discoveries.**

Mood Media's global survey of over 8,000 shoppers unveils a common theme: shoppers worldwide crave unique experiences. Retailers can motivate desired behaviors by going beyond showcasing products. **They must curate the right atmosphere and layout, augmenting it with audio-visual and digital technologies highlighting the full product range and personalization options.**

67%

of in-store shoppers
are open to **new discoveries**



What motivates people to **shop in-store?**

Shoppers visit physical stores to engage their senses. Many shoppers prefer to discover and explore items with friends and family, as part of a social experience where everyone can see, touch, taste, and smell items – and compare opinions and thoughts.

1 Seeing is believing.

52% of shoppers prefer to see a range of items on display in front of them.

OF THOSE

59% women

45% men

It brings into sharp focus the need for retailers to curate experiences through visually eye-catching merchandising (endorsing the need for engaging content on digital screens).

3 Social experiences.

35% identify the thrill of spending time with friends and family when shopping is a major reason for visiting physical stores.

Retailers are already acting on this social element by building areas into stores where friends can relax with one another and be more connected to the brand community.

2 Instant Gratification.

39% of shoppers want that instant gratification of taking a purchase home on the same day.

OF THOSE

43% women

26% men

36% Gen Z

43% Gen X

It is a reminder for retailers to replenish stock and offer instant online ordering for anything not available in-store.

4 Explore and discover.

33% say discovering new products is a reason to shop in-store.

OF THOSE

2 in 3 are open to new offers

OF THOSE

nearly 1 in 3 are actively looking to be inspired, a prime motivator for visiting each store.



Atmosphere **drives footfall** (for those who get it right)

When asked what creates
a **pleasant in-store
experience:**

85% of shoppers revealed the **right scent is important** in their in-store experience

70% more than two in three shoppers say **the same for branded music**

**How important
scent and sound
are varies from
one type of
store to another,
particularly when
other elements are
considered.**

For example:

45% of department store shoppers, reveal **pleasant music is the main key to an enjoyable experience**

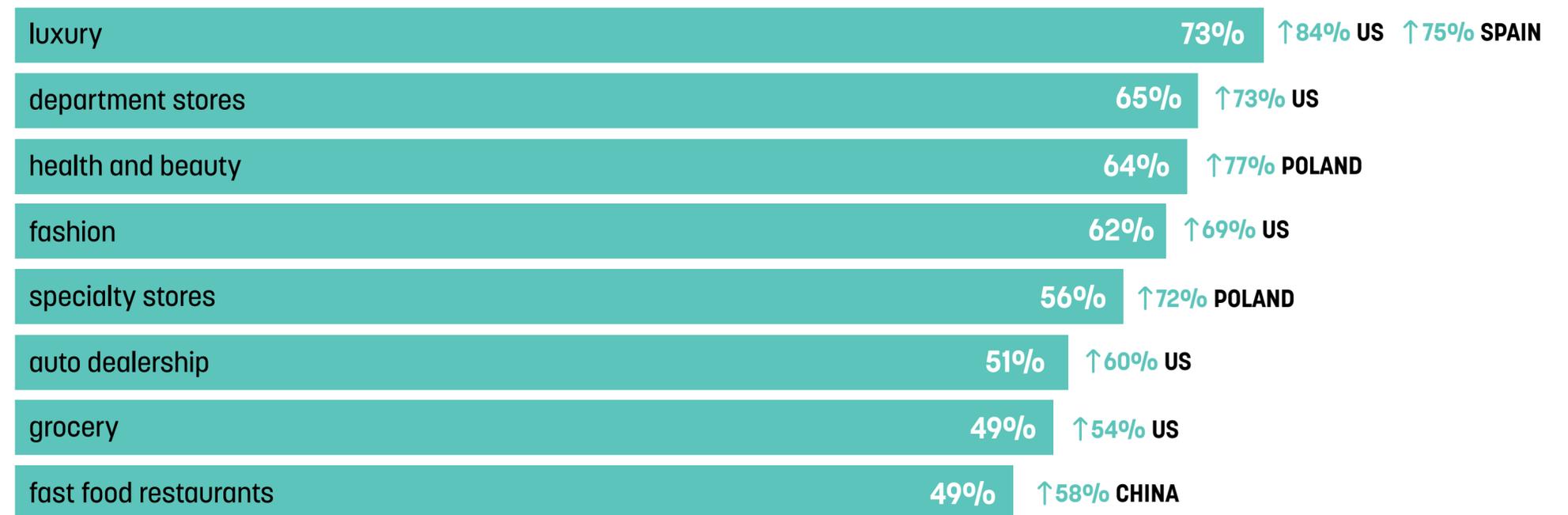
42% identify a **pleasant scent**

As one can imagine, in health and beauty stores, it is the other way around, with **scent coming out on top for 49% of shoppers**, compared to **42% looking for good music**. In fashion, it is neck and neck between the two.

How are retailers doing in **creating the right atmosphere?**

The good news is that, although feedback varies between countries and between different types of stores in each market, the majority of retailers around the globe are getting the ambience mostly right.

MOOD RESEARCH REVEALED AVERAGE NET GOOD SCORES FOR AMBIENCE

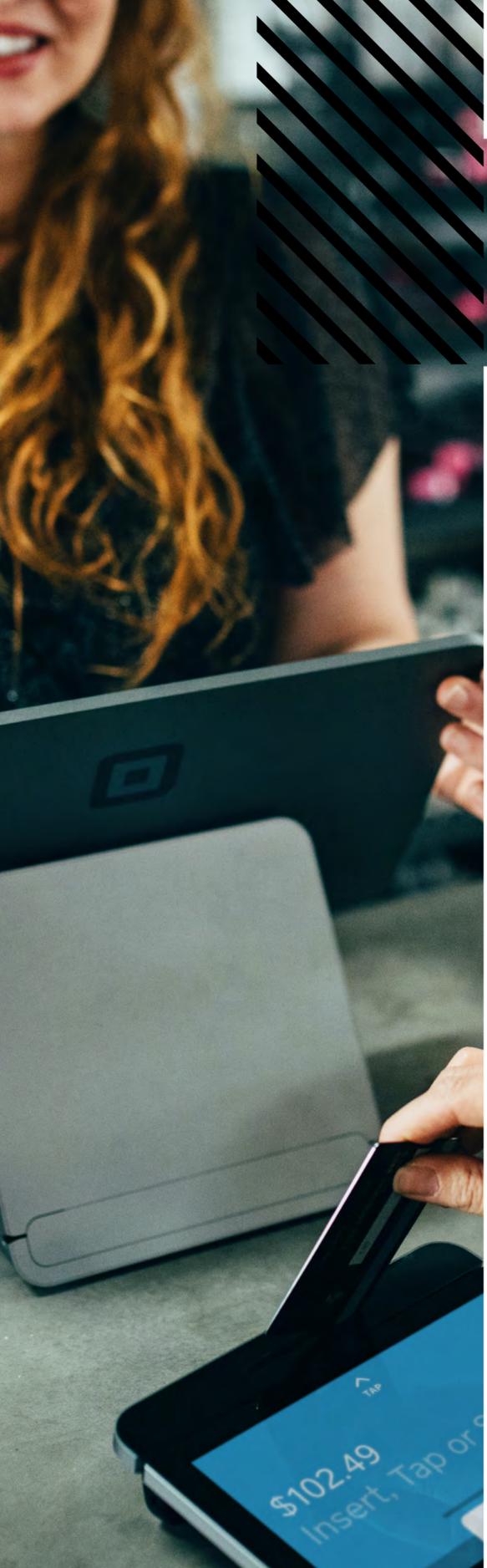


75%

Spanish luxury stores received the best score among 75% of shoppers.

73%

American department stores came a close second for 73% of shoppers.



Smart retailers **make the most of technology**

Getting the right atmosphere is essential, but having a store that is visually appealing and offers the right fragrance to match on-brand audio is not the full story. Busy shoppers want to be helped to get in the right mood to dwell in a store longer and explore a merchant's full product portfolio.

Mood Media's research uncovered how customer behavior is influenced by setting the right atmosphere and using the best audio/visual equipment **to deliver on customers' discovery and personalization needs.**

Retailers have a good idea that getting the atmosphere right is essential in getting people into a store. Here's why.

55% **Music drives mood** - makes one in two **(55%) shoppers feel happy**

50% **Scent boosts loyalty** - encourages people to return - the right scent will get **49% returning to a specialty store**, encourages **50% to return to a fast food outlet**

27% **Seasonal displays** - are the biggest way to **drive impulse sales for 27% of shoppers**



1
The impact of the right atmosphere and merchandising



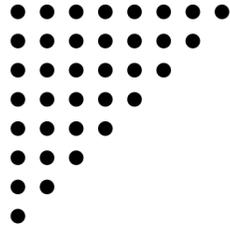
2
Social experiences for longer visits and loyalty

Shoppers are seeking out retailers who understand a trip to a shopping center needs to provide space for people to relax and unwind.

Two areas that shoppers were particularly keen to see supported by retailers were:

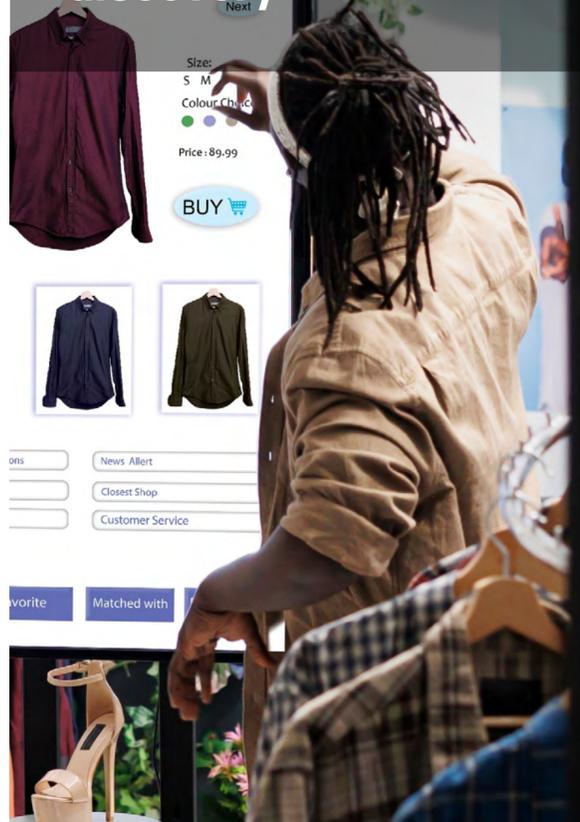
53% **Hang out area** - encourages **53% of shoppers to stay longer**, **49% to revisit** a department store

42% **Kids area** - **42% will stay** in a health and beauty store longer, and **39% will revisit**



3

Interactive tech boosts product discovery



The right atmosphere will get people to come into a store and explore, while areas to socialize will encourage them to stay longer and visit again. To ensure retailers are making the most of their investment in setting the right scene to drive up footfall, they need to make shoppers aware of their full product portfolio. Great merchandising will obviously help here, but to encourage people to become fully immersed in the full product line to get an idea of what the brand is truly all about, shoppers are expecting to lean on technology.

Mood Media researchers discovered that **42% of shoppers pay attention to video and audio messages** delivered by a retailer in-store. Crucially, **37% reveal they have made purchases** based on those messages.

When it comes to the type of digital signage and/or interactive screen, the following were popular with consumers:

Types of display in demand:

75% would like to use interactive screens to discover a retailer's online product portfolio

73% want an interactive screen to explore in-store products and to personalize products

72% think screens showing product information are important

69% love the 'wow' factor they get from seeing a large video wall in-store

Displays: Driving new behaviors

In addition to prompting **38% of customers to make purchases**, the right digital signage strategy can drive other desirable outcomes.

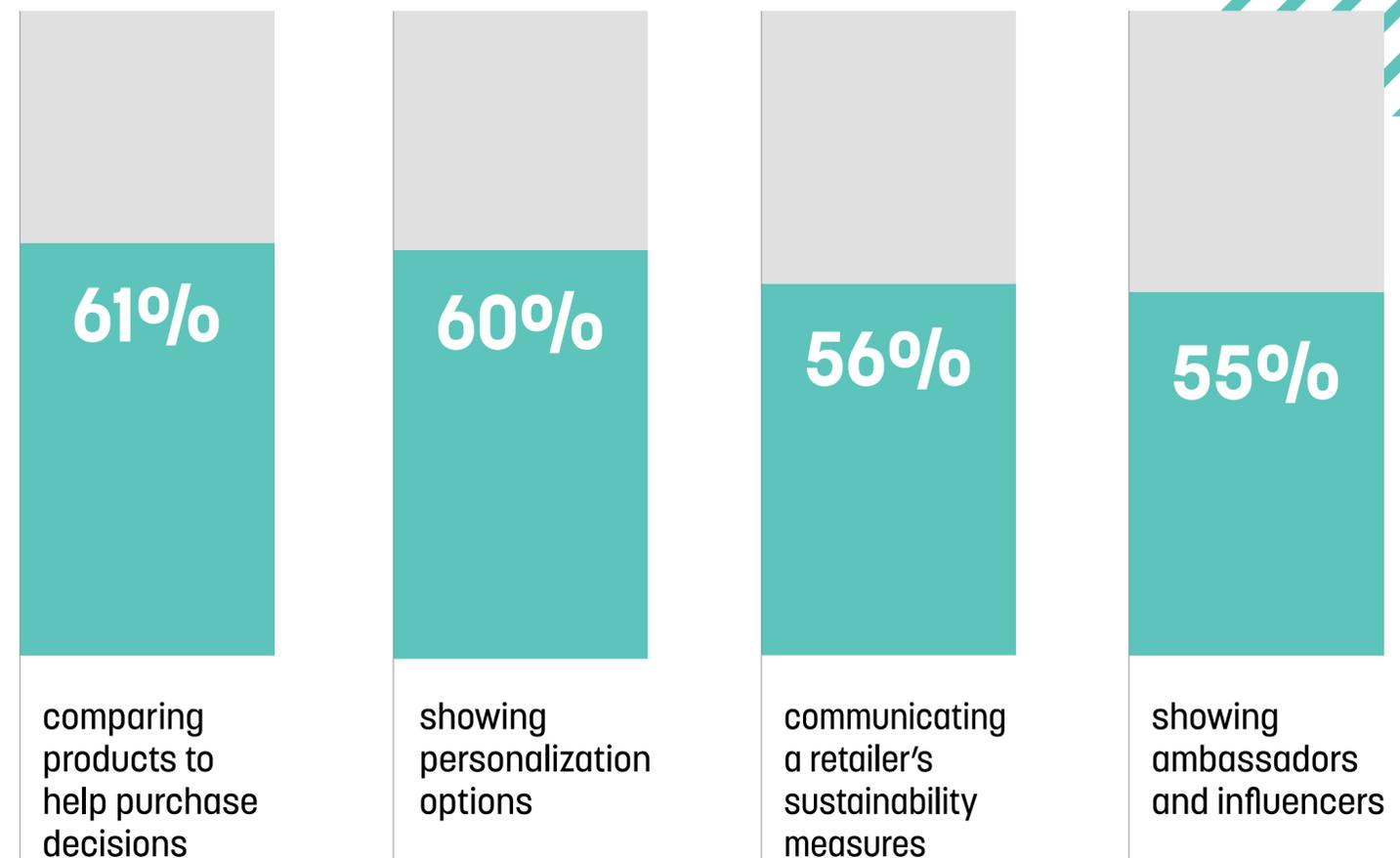
Interactive screens in luxury stores prompt **34% of customers to buy in-store more** and prompt **29% to make return visits**

Interactive changing rooms lead **43% to revisit** a fashion store, and prompts **30% in a department store to consider a purchase**

Interactive kiosks - the most popular technical advancement for **75% of shoppers**. In grocery stores, they encourage **23% to consider making a purchase**

Personalization tech - using touch screens to show the full product portfolio encourages **26% of consumers to make an 'in-store' purchase**

Digital displays are popular with shoppers and add value by:



Embrace **mobile** & **online**

The debate over online versus in-store is over. Serious retailers understand that a majority of purchases are made in-store, with online channels being used when it is more convenient for a customer. Crucially, the two are not in competition with each other but rather natural partners through services such as buying online and picking up in-store.

Shoppers reveal they get the most from a visit to a shop when the retail experience is combined with the power of online, particularly through mobile. The device in nearly everyone's pocket is a gateway for retailers to deepen their interaction with customers and increase the likelihood of additional sales. Mobile technology can be used to open up a retailer's full product portfolio as well as guide them around a store.

Shoppers' top hopes from mobile in physical retail are:

75%

are interested in **QR codes to discover more** about a product or product line

73%

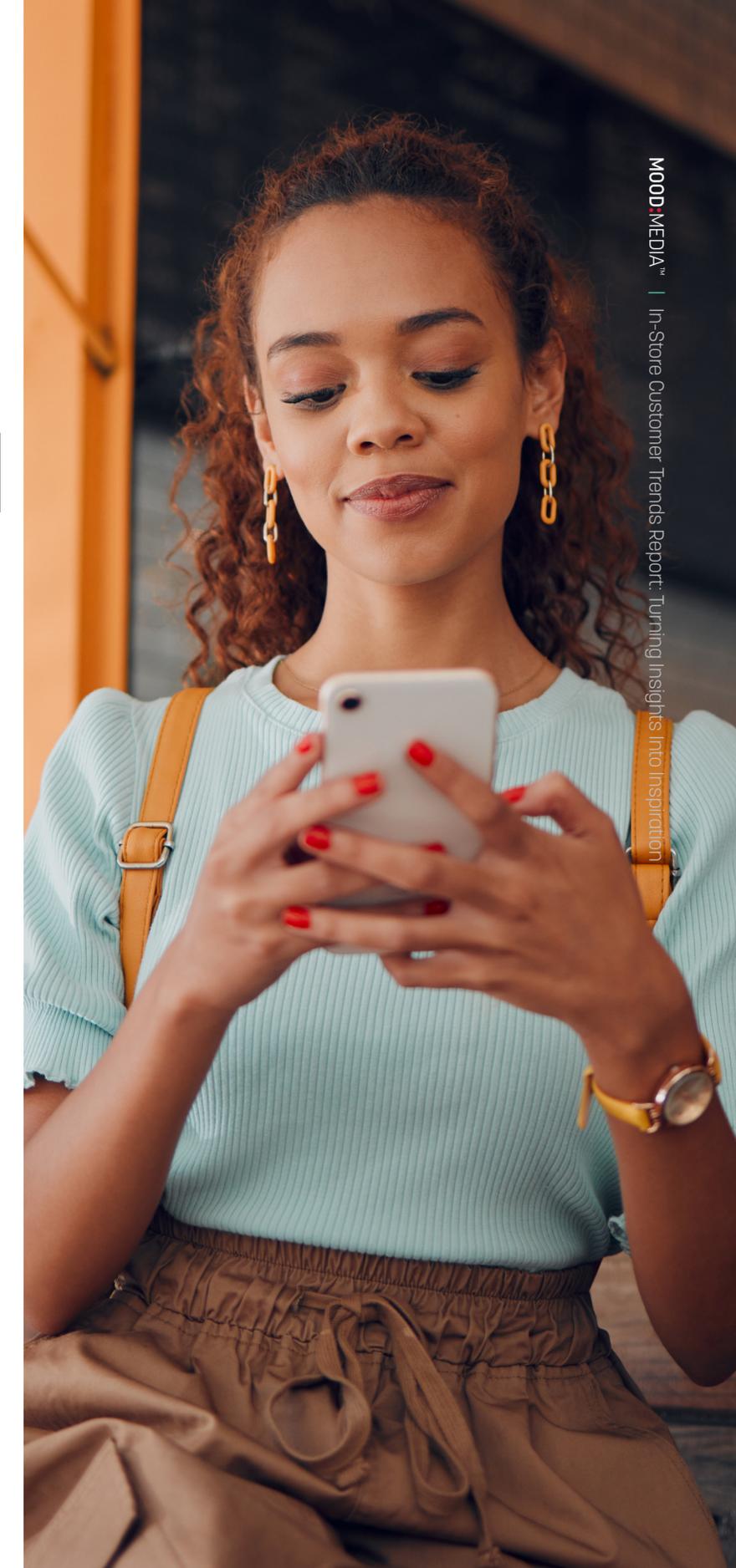
want to **use their mobile to navigate** a store

71%

want **real-time recommendations** as they are guided around a store

65%

want **VR and AR experiences** to guide them around stores and explore product lines



Focus on shoppers

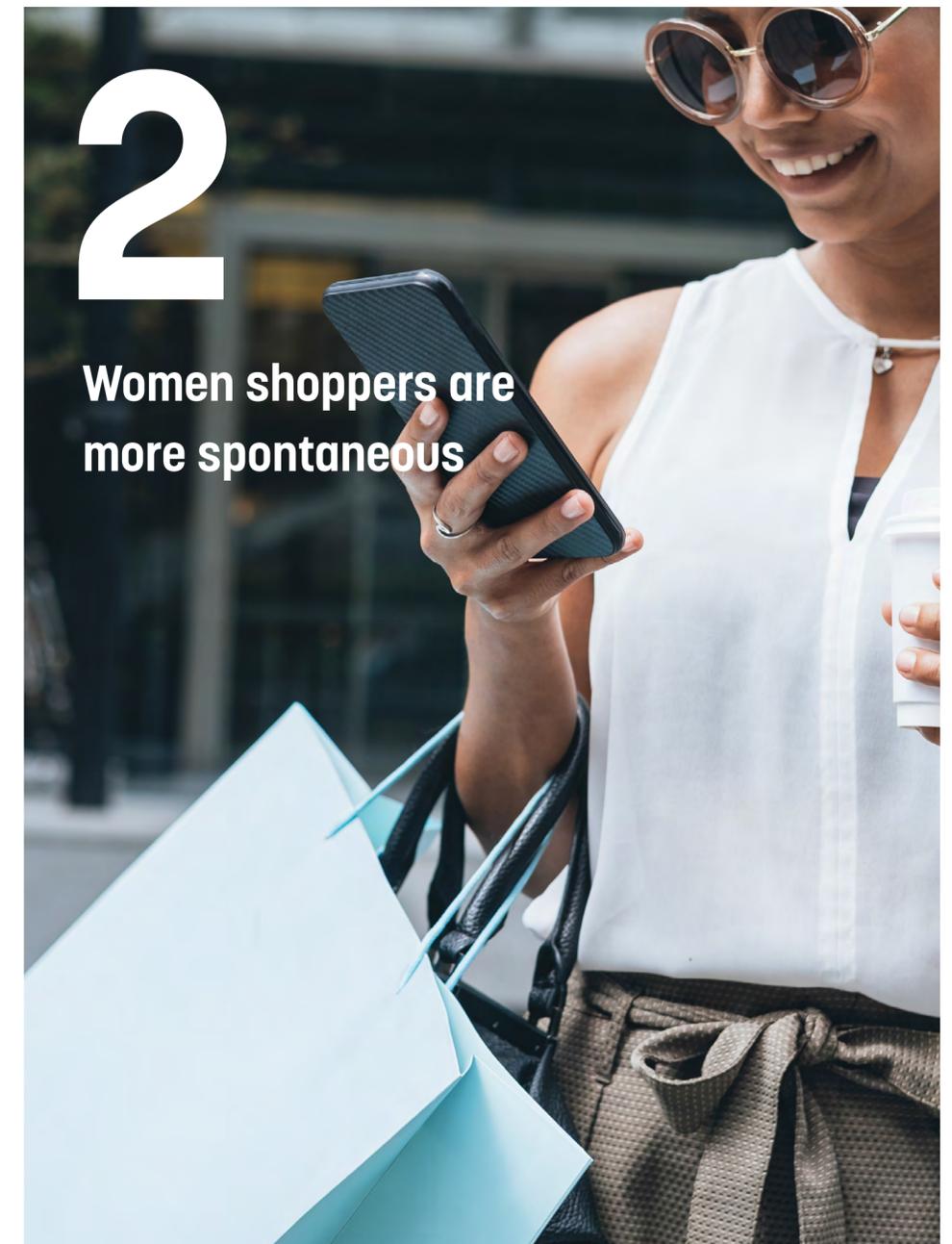
Not every tactic used by a retailer will have the same impact on every shopper. Differences in age, gender and income will always have a bearing on how well each element of a merchant's strategy is received.



Sustainability applies to all

It is easy to imagine a picture of whom environmental values mean more to, but Mood Research shows that it is **equally important for nearly four in five (78%) shoppers, regardless of age, gender or income.** Retailers should consider how to communicate sustainability efforts in store.

Three in four women in department stores and fashion stores are open to making purchases they had not originally intended to make, compared to **one in two men.**



Women shoppers are more spontaneous

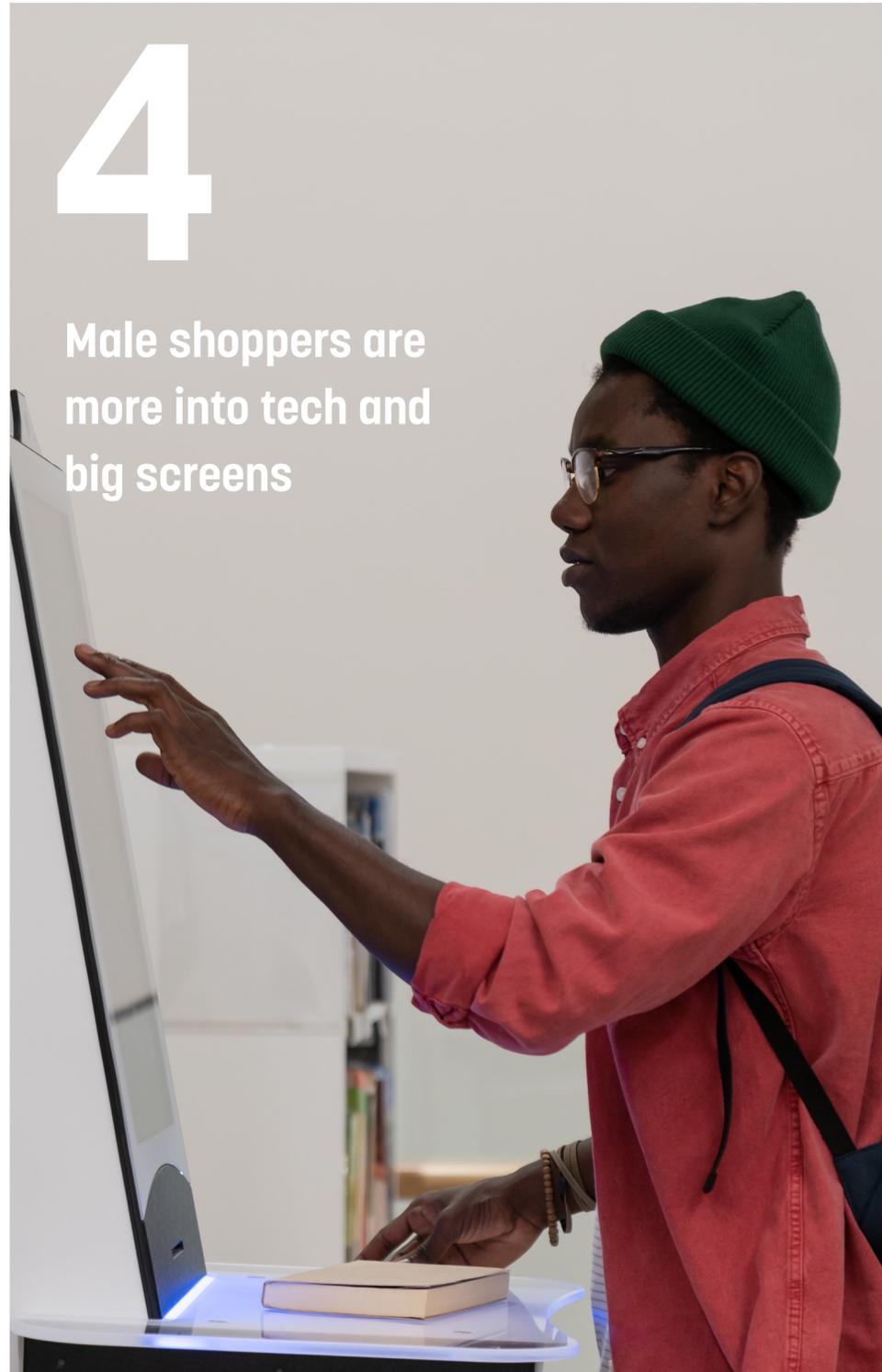


3

Women and Gen Z shoppers are the most social

37% of women want social experiences when they shop, compared to **32%** of men and similarly, **37%** of Gen Z are looking for fun with friends, compared to **31%** among Gen X.

Men are more eagerly awaiting AV and VR services in stores than women (72% vs 59%), and they are also far more receptive to a big video wall (74% to 65%).



4

Male shoppers are more into tech and big screens



5

Younger customers are more receptive to screens

Screens are popular among all shoppers, only more so with younger age groups.

78%

of Gen Z shoppers are eager to see product information on screens as well as use them to personalize products on screens.

↓ DROPS SLIGHTLY

65% of Gen X Men
67% of Gen X Women



Conclusion: 5 Takeaways

Mood Media's In-store Trends research reveals that two in three consumers enter stores not with a set shopping list but with a desire for **inspiration** and **discovery**. The retailer's role shifts from mere merchandising to creating an enticing environment inviting shoppers to explore the full product portfolio. The data highlights five crucial areas for retailers to enhance dwell time, increase purchases, and drive repeat visits.

Craft an **Inviting Atmosphere**

Successful stores create experiences by tapping into shoppers' desire for the right scent and on-brand music, enhancing the environment and fostering openness to new discoveries.

Enhance **Discovery & Personalization**

Deploy kiosk screens with information about size, color, and styling options to offer a personalized shopping experience while making it easy for customers to explore the full product complement.

Inspire **with Visuals**

Retailers are extending stays, boosting purchases, and encouraging repeat visits by enhancing visual merchandising with product-rich window displays and video walls, plus interactive service innovations like checkout screens promoting social media and loyalty programs.

Facilitate **Social Experiences**

Customer expectations have shifted, with many seeing retail trips as an opportunity for social bonding. Acknowledge this evolution by creating in-store lounges and communal gathering areas.

Bridge the **Mobile Gap**

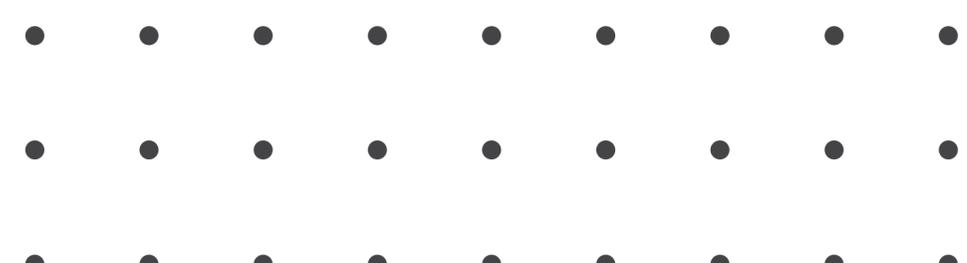
Blur the lines between online and physical retail by offering in-store customers access to the full product portfolio through QR codes and mobile apps, fostering interactive exploration and real-time offers in person and online.

Our Methodology

Mood Media, P2Pi, and Censuswide surveyed 8,171 consumers in the summer of 2023 to understand what motivates consumers to visit stores and what they expect from the experience. The survey captured attitudes toward shopping frequency, atmosphere, sustainability, and the impact of digital technology on their in-store customer journeys. Respondents (ages 18+) represented eight countries – Australia, China, France, the Netherlands, Poland, Spain, the UK, and the US – and had visited at least one physical retail store or hospitality space within 12 months.

About Mood Media

Mood Media is the world's leading experiential media company, redefining the on-premise retail customer experience and delivering unparalleled value to businesses and brands globally, including video music entertainment, communications, digital integration and interactivity, retail media and ad networks, digital signage, messaging, scent, and more. Mood leverages cutting-edge digital technology, curated and original creative content, and design expertise to create personalized, engaging encounters in every guest journey. Serving more than 500,000 customer locations in over 140 countries, Mood reaches 165 million+ consumers each day. For more information, please visit moodmedia.com.



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