Your invaluable resource to win with shoppers all over the world

Profiling their rapidly evolving behaviors and attitudes across 16 product categories and 28 diverse countries, delivered through an easy-to-use data portal
2021 country coverage
Surveying 50,000 shoppers around the world

Fielding:
February-June 2021
depending on country

Argentina
Australia
Austria
Belgium
Brazil
Canada
Chile
China
Colombia
Ecuador
France
Germany
India
Indonesia
Italy
Japan
Mexico
Netherlands
Peru
Poland
Russia
South Africa
South Korea
Spain
Sweden
Switzerland
UK
USA
2021 category coverage

Tech
- Smartphones
- Computing
- Wearables
- TV/Streaming/Media Player

Personal
- Haircare
- Skincare
- Cosmetics/Fragrances
- OTC healthcare
- Toys
- Clothing/Fashion

Household
- Packages food/beverages
- Small home appliances
- Major home appliances
- Household washing/cleaning products
- Replacement auto/truck tires
- Home furnishing/accessories
Illuminate the most vital shopper issues

Now with trending from pre to in-COVID (2020-2021)

Bricks and Clicks
Rise of omni-channel
Role of physical store vs online
Adoption of click and collect

Mobile shopping
Most common shopping activities on mobile
Social media as emerging shopping platform
Barriers to social media shopping

Touchpoints
Sources of information
Most influential in shopping process
Online and in-store

Special topics
Attitudes and adoption levels of emerging shopping tools (i.e., voice, AR/VR, visual search)
Peek into future with Leading Edge Consumers (LEC)
Dive into shopper sustainability attitudes
Green Gauge identifies receptive consumers

More Green

“Green is a badge of honor, a status symbol. I’m eager to showcase my eco-friendly behaviors and purchases.”

“Green in Deed”

“I care about the environment and am prepared to spend the time and energy to do what it takes to help.”

“Glamour GREEN”

“Less Green

“I care about the environment but would prefer to focus mostly on the ‘easy’ actions I can take.”

“Carbon CULTURED”

“I’m willing to help the environment, but don’t feel able – I need more tools in order to act”

“GREEN In Need”

“I’m skeptical and cynical about being environmentally conscious, but still participate sometimes.”

“JADED”

7/13/2021  •  GfK FutureBuy® 2021
Preview of initial findings
Online & omni shopping are on the rise
Pandemic drives growth in most categories

% of shoppers reporting shopping “exclusively in-store”, “exclusively online” and “both online & offline”

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>Online &amp; offline</th>
<th>In-store</th>
<th>Online only</th>
<th>exclusively in-store</th>
<th>exclusively online</th>
<th>exclusively online &amp; in-store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Packed Food &amp; Beverages</td>
<td>19%↑8</td>
<td>22%↑12</td>
<td>18%↑7</td>
<td>18%↑4</td>
<td>13%↑14</td>
<td>13%↑4</td>
</tr>
<tr>
<td>OTC Healthcare</td>
<td>72%↑13</td>
<td>65%↑11</td>
<td>64%↑5</td>
<td>62%↑6</td>
<td>53%↑7</td>
<td>48%↑13</td>
</tr>
<tr>
<td>Haircare products</td>
<td>26%↑12</td>
<td>28%↑14</td>
<td>33%↑17</td>
<td>34%↑16</td>
<td>33%↑15</td>
<td>37%↑10</td>
</tr>
<tr>
<td>HH Cleaning</td>
<td>33%↑17</td>
<td>20%↑16</td>
<td>22%↑9</td>
<td>31%↑17</td>
<td>31%↑18</td>
<td>33%↑12</td>
</tr>
<tr>
<td>Replacement Tires</td>
<td>33%↑17</td>
<td>19%↑14</td>
<td>20%↑16</td>
<td>31%↑18</td>
<td>31%↑13</td>
<td>25%↑12</td>
</tr>
<tr>
<td>Skincare products</td>
<td>37%↑14</td>
<td>43%↑15</td>
<td>37%↑13</td>
<td>33%↑17</td>
<td>33%↑18</td>
<td>33%↑16</td>
</tr>
<tr>
<td>Make-up, cosmetics/fragrances</td>
<td>42%↑10</td>
<td>44%↑7</td>
<td>42%↑11</td>
<td>44%↑12</td>
<td>36%↑13</td>
<td>39%↑12</td>
</tr>
<tr>
<td>Home Furnishings/accessories</td>
<td>37%↑11</td>
<td>25%↑19</td>
<td>25%↑16</td>
<td>25%↑19</td>
<td>42%↑13</td>
<td>38%↑14</td>
</tr>
<tr>
<td>Clothing/Fashion</td>
<td>33%↑12</td>
<td>31%↑7</td>
<td>31%↑5</td>
<td>33%↑17</td>
<td>33%↑18</td>
<td>23%↑10</td>
</tr>
<tr>
<td>TV/Streaming Media</td>
<td>33%↑14</td>
<td>23%↑5</td>
<td>21%↑3</td>
<td>23%↑5</td>
<td>23%↑4</td>
<td>21%↑3</td>
</tr>
<tr>
<td>Major Home Appliances</td>
<td>42%↑18</td>
<td>47%↑19</td>
<td>47%↑19</td>
<td>47%↑19</td>
<td>47%↑19</td>
<td>47%↑19</td>
</tr>
<tr>
<td>Small Home Appliances</td>
<td>23%↑10</td>
<td>23%↑10</td>
<td>23%↑10</td>
<td>23%↑10</td>
<td>23%↑10</td>
<td>23%↑10</td>
</tr>
<tr>
<td>Smartphones</td>
<td>21%↑13</td>
<td>21%↑13</td>
<td>21%↑13</td>
<td>21%↑13</td>
<td>21%↑13</td>
<td>21%↑13</td>
</tr>
<tr>
<td>Wearables</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
</tr>
<tr>
<td>Toys</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
</tr>
<tr>
<td>Computing</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
<td>16%↑3</td>
</tr>
</tbody>
</table>

FB_02: Thinking about the last time you shopped for [CATEGORY], how did you shop?

7/13/2021 • GfK FutureBuy® 2021

© GfK
## Factors driving channel choice for purchase

In-store buyers get products sooner; online buyers shop with ease

### In-store

<table>
<thead>
<tr>
<th>Factor</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can get products sooner</td>
<td>43%</td>
</tr>
<tr>
<td>Let’s me see &amp; feel the products</td>
<td>42%</td>
</tr>
<tr>
<td>Saves money</td>
<td>37%</td>
</tr>
<tr>
<td>Can buy other products</td>
<td>35%</td>
</tr>
<tr>
<td>Shopping is faster</td>
<td>35%</td>
</tr>
<tr>
<td>Products consistently in-stock</td>
<td>28%</td>
</tr>
<tr>
<td>Social distancing/mask guidelines</td>
<td>23%</td>
</tr>
</tbody>
</table>

### Online

<table>
<thead>
<tr>
<th>Factor</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping is easier</td>
<td>43%</td>
</tr>
<tr>
<td>Offers free delivery</td>
<td>41%</td>
</tr>
<tr>
<td>Saves money</td>
<td>38%</td>
</tr>
<tr>
<td>Better selection</td>
<td>35%</td>
</tr>
<tr>
<td>Shopping is faster</td>
<td>33%</td>
</tr>
<tr>
<td>Products consistently in-stock</td>
<td>23%</td>
</tr>
<tr>
<td>To avoid getting sick</td>
<td>20%</td>
</tr>
</tbody>
</table>

COVID-related factors less impactful

FB_08a: Thinking about the last time you were deciding whether to purchase something online versus in a store, and decided to purchase in a store, what factors were most important in driving your choice to purchase there? Please select up to 5 items.

FB_08b: Thinking about the last time you were deciding whether to purchase something online versus in a store, and decided to purchase online, what factors were most important in driving your choice to purchase there? Please select up to 5 items.
Digital touchpoints are trending up
Increases recorded across categories

Reported category touchpoints as “top 3” in influence

**Smartphones**
- Online advertising ↑10 pts
- Brand websites ↑7 pts
- Product demos ↑7 pts

**Packaged Food & Beverage**
- Price comparison/discount websites ↑8 pts
- In-store displays ↑7 pts
- Retailer websites ↑5 pts

**Small Home Appliances**
- Price comparison/discount websites ↑8 pts
- General shopping sites ↑6 pts
- Social media ↑5 pts

FB_07: When shopping for [CATEGORY], which of these influence you the most?

7/13/2021  © GfK  GfK FutureBuy® 2021
Sustainable consumers seek personalization
An opportunity for brands, retailers

“I like when I get personalized offers from retailers/brands.”

(Strongly/Somewhat Agree)

- **Total**: 54%
- **GREEN inDeed**: 58%
- **Glamour GREEN**: 62%
- **Carbon CULTURED**: 47%
- **GREEN In Need**: 59%
- **JADED**: 41%

FB_11 Thinking about shopping... how much do you agree or disagree with each of the following statements?

7/13/2021  GfK FutureBuy® 2021
Subscription services booming with surveys a key engagement tactic

**% trying & likely continuing shopping via subscription services**

<table>
<thead>
<tr>
<th>Group</th>
<th>% Trying &amp; Likely Continuing</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>23%</td>
<td>↑7pp</td>
</tr>
<tr>
<td>Post Millennials</td>
<td>22%</td>
<td>↑2pp</td>
</tr>
<tr>
<td>Millennials</td>
<td>34%</td>
<td>↑16pp</td>
</tr>
<tr>
<td>Gen X</td>
<td>24%</td>
<td>↑5pp</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>13%</td>
<td>↑2pp</td>
</tr>
</tbody>
</table>

**% trying & likely continuing taking a quiz/survey to get matched with a personalized product**

<table>
<thead>
<tr>
<th>Group</th>
<th>% Trying &amp; Likely Continuing</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Post Millennials</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Millennials</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>14%</td>
<td></td>
</tr>
</tbody>
</table>

FB_13 Thinking about these new ways of shopping, which of these best describes your experience?

7/13/2021 • GfK FutureBuy® 2021
Concerns about information collection are pervasive
A trend across generations

“I am uncomfortable with the amount of information that retailers/brands seem to have about me.”
(Strongly/Somewhat Agree)
Social media networks embraced for shopping

Important sources for decision making

“My social media networks are important information sources for shopping decisions”
(Strongly/Somewhat Agree)

<table>
<thead>
<tr>
<th>Group</th>
<th>% Agree</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>35%</td>
<td>↑5pp</td>
</tr>
<tr>
<td>Post Millennials</td>
<td>50%</td>
<td>↑10pp</td>
</tr>
<tr>
<td>Millennials</td>
<td>58%</td>
<td>↑10pp</td>
</tr>
<tr>
<td>Gen X</td>
<td>29%</td>
<td>↑2pp</td>
</tr>
<tr>
<td>Baby Boomers</td>
<td>12%</td>
<td>↓4pp</td>
</tr>
</tbody>
</table>
Millennials find social shopping fun, easy, convenient
Older generations see bigger threats, less benefit

- **Shopping on social media networks is fun**
  - Post Millennials: 50%
  - Millennials: 48%
  - Gen X: 39%
  - Baby Boomers: 28%

- **I get targeted with the best products for me**
  - Post Millennials: 48%
  - Millennials: 29%
  - Gen X: 23%
  - Baby Boomers: 12%

- **Shopping on social media is convenient/easy**
  - Post Millennials: 54%
  - Millennials: 38%
  - Gen X: 32%
  - Baby Boomers: 18%

- **I am uncomfortable with the amount of ads I see on social media**
  - Post Millennials: 49%
  - Millennials: 53%
  - Gen X: 50%
  - Baby Boomers: 57%

---

FBS_1 Have you ever shopped on social media doing one of the following?

7/13/2021  •  GfK FutureBuy® 2021
Glamour Greens say targeting works for them
Claim they see “best products for me”

“On my social media networks, I get targeted with the best products for me.”

(Strongly/Somewhat Agree)

<table>
<thead>
<tr>
<th>Group</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glamour Greens</td>
<td>34%</td>
</tr>
<tr>
<td>More Green</td>
<td></td>
</tr>
<tr>
<td>Less Green</td>
<td></td>
</tr>
<tr>
<td>Green inDeed</td>
<td>34%</td>
</tr>
<tr>
<td>Glamour Green</td>
<td>47%</td>
</tr>
<tr>
<td>Carbon Cultured</td>
<td>23%</td>
</tr>
<tr>
<td>Green in Need</td>
<td>27%</td>
</tr>
<tr>
<td>Jaded</td>
<td>19%</td>
</tr>
</tbody>
</table>

FBS_2 How much would you agree with each of the following statements?
7/13/2021  GfK FutureBuy®  2021
Access the complete FutureBuy® report with survey data spanning 28 countries and 16 product categories.

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