

The Desertification of Main Street (Where Has Everybody Gone?)

Nicolas Boyon

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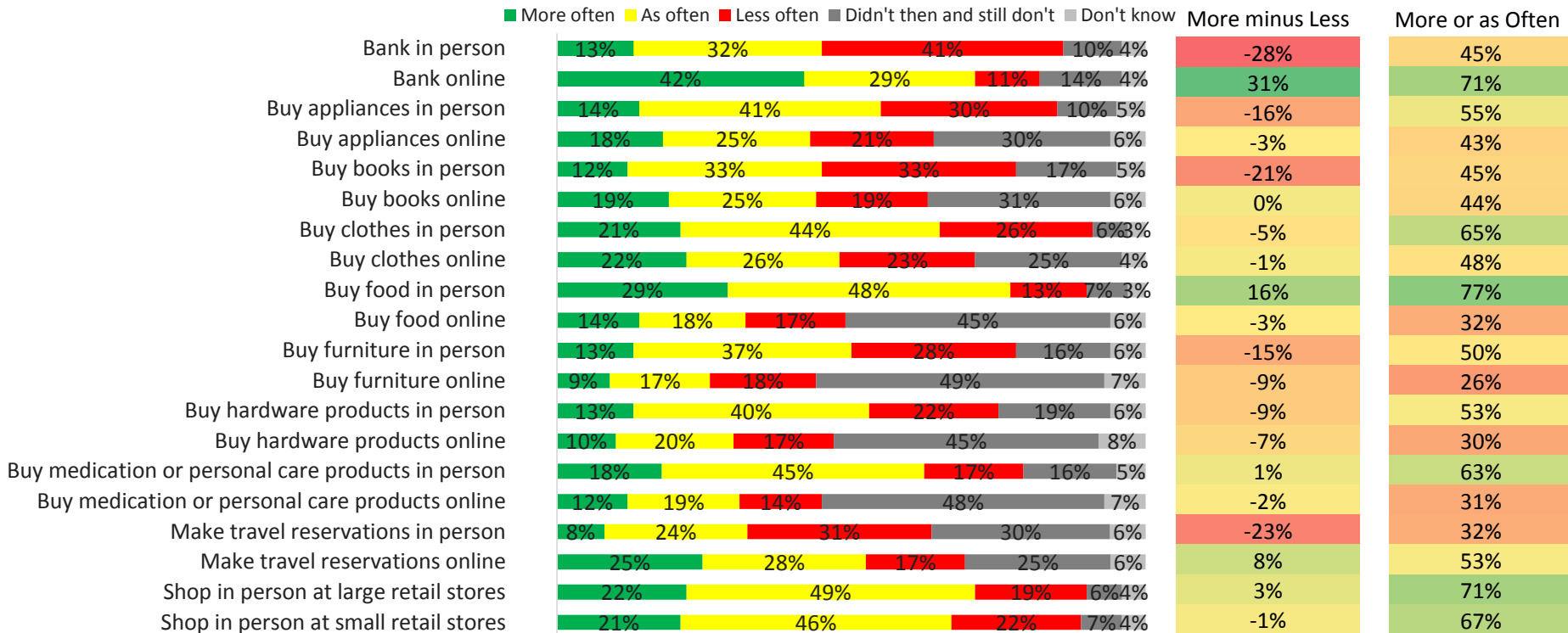
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Global Changes in Online & Offline Shopping Behavior

Changes in Online & Offline Shopping Behavior: Global

Q1. Do you personally do each of the following more often, as often, or less often than you did three years ago?

Note that by "online", we mean using a website or a mobile app. By "in person", we mean at a "physical" location (e.g., a store or street market), not online.



Ipsos poll conducted September 22-October 6, 2017 among ca. 1,000+ adults aged 18-64 in each of the U.S. and Canada, 1000+ adults aged 16-64 in each of Australia, Brazil, China, France, Germany, Great Britain, Italy, Japan, and Spain and 500+ adults aged 16-64 in each of Argentina, Belgium, Chile, Colombia, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden and Turkey.

Changes in Local Shopping Behavior: All Countries

Q1. Do you personally do each of the following more often, as often, or less often than you did three years ago?

Note that by “online”, we mean using a website or a mobile app. By “in person”, we mean at a “physical” location (e.g., a store or street market), not online.

MORE MINUS LESS	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	KSA	SER	RSA	SKR	ESP	SWE	TUR	USA
Bank in person	-28%	-30%	-50%	-43%	-12%	-39%	-43%	-21%	-14%	-28%	-42%	-46%	-40%	-19%	-31%	-15%	-9%	-4%	-42%	-22%	1%	-22%	-42%	-36%	-30%	-25%	-30%	-28%
Bank online	31%	27%	38%	37%	21%	37%	45%	30%	26%	17%	35%	44%	24%	43%	17%	10%	26%	11%	39%	30%	24%	29%	55%	36%	33%	30%	34%	34%
Buy appliances in person	-16%	-26%	-18%	-23%	-12%	-11%	-11%	-13%	1%	-24%	-25%	-26%	-31%	-4%	-29%	-19%	-4%	7%	-21%	-40%	9%	-17%	-4%	-25%	-17%	-21%	-22%	-6%
Buy appliances online	-3%	-14%	-7%	-6%	10%	-4%	-7%	18%	-12%	-8%	1%	7%	-12%	1%	-4%	8%	0%	-13%	0%	-12%	-7%	-5%	-11%	7%	-4%	-3%	-7%	-1%
Buy books in person	-21%	-22%	-31%	-23%	-12%	-25%	-10%	-15%	-17%	-20%	-19%	-29%	-36%	-14%	-24%	-23%	-6%	-7%	-28%	-43%	1%	-15%	-25%	-25%	-21%	-24%	-23%	-22%
Buy books online	0%	-7%	-2%	-12%	4%	4%	-12%	15%	-8%	-1%	8%	10%	-21%	9%	1%	8%	4%	-8%	-9%	-3%	-5%	-7%	-2%	16%	8%	-3%	-4%	7%
Buy clothes in person	-5%	-6%	-15%	-16%	5%	-11%	5%	-15%	19%	-18%	-13%	-26%	6%	3%	-8%	-20%	16%	15%	-18%	-22%	15%	-7%	22%	-22%	-4%	-7%	5%	-8%
Buy clothes online	-1%	-1%	-5%	4%	0%	5%	-5%	27%	-11%	-4%	9%	12%	-18%	10%	-8%	6%	4%	-9%	-7%	-12%	-5%	-3%	-10%	12%	5%	-1%	-13%	8%
Buy food in person	16%	24%	15%	2%	29%	12%	39%	3%	33%	-1%	20%	4%	12%	10%	11%	2%	34%	41%	19%	12%	26%	26%	32%	-15%	11%	3%	13%	22%
Buy food online	-3%	-7%	-8%	-1%	-7%	3%	-16%	30%	-13%	-1%	-8%	8%	-7%	2%	-3%	0%	-4%	-14%	-10%	-7%	4%	-9%	-3%	10%	-7%	3%	-1%	7%
Buy furniture in person	-15%	-19%	-16%	-25%	-8%	-13%	-21%	-7%	-13%	-15%	-21%	-19%	-29%	-4%	-18%	-11%	-4%	-7%	-10%	-26%	5%	-13%	-15%	-23%	-18%	-21%	-15%	-15%
Buy furniture online	-9%	-8%	-12%	-11%	0%	-3%	-14%	3%	-12%	-8%	-10%	-8%	-16%	-11%	-3%	-1%	-11%	-12%	-15%	-18%	-11%	-17%	-15%	-6%	-10%	-12%	-10%	-3%
Buy hardware products in person	-9%	-10%	-4%	-17%	-11%	-8%	0%	-11%	1%	-19%	2%	-17%	-28%	-13%	-20%	-7%	7%	4%	-13%	-9%	5%	-22%	-4%	-19%	-11%	-8%	-9%	-6%
Buy hardware products online	-7%	-12%	-10%	-6%	-6%	-3%	-13%	17%	-15%	-3%	-13%	2%	-13%	-9%	-11%	-1%	-10%	-11%	12%	-5%	0%	-13%	-10%	-11%	-10%	-10%	-10%	-5%
Buy medication or pers. care products in person	1%	10%	2%	-10%	10%	8%	18%	-6%	8%	-3%	-9%	-3%	-3%	7%	-3%	-7%	14%	11%	-16%	1%	19%	3%	17%	-16%	2%	-7%	-16%	4%
Buy medication or pers. care products online	-2%	-10%	-9%	-6%	-1%	0%	-7%	6%	-4%	-7%	6%	-4%	-10%	-8%	1%	2%	1%	-9%	-7%	-4%	-4%	-9%	-9%	1%	1%	13%	-16%	8%
Make travel reservations in person	-23%	-35%	-32%	-26%	-15%	-27%	-21%	-18%	-35%	-15%	-23%	-27%	-30%	-18%	-30%	-15%	-27%	-25%	-29%	-15%	-2%	-17%	-26%	-32%	-32%	-21%	-13%	-20%
Make travel reservations online	8%	2%	8%	3%	-5%	3%	2%	30%	13%	-3%	5%	18%	-6%	32%	11%	7%	15%	4%	8%	-1%	20%	-3%	8%	15%	20%	13%	5%	12%
Shop in person at large retail stores	3%	-1%	-4%	-3%	3%	-6%	13%	-1%	14%	-10%	-13%	-12%	12%	17%	0%	-8%	14%	15%	9%	4%	12%	14%	19%	-8%	2%	6%	6%	-5%
Shop in person at small retail stores	-1%	7%	-9%	-17%	6%	-8%	15%	-1%	13%	-16%	-10%	-12%	6%	14%	-16%	-13%	8%	24%	-5%	-1%	8%	5%	19%	-19%	-4%	-8%	-8%	-1%

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Changes in Local Shopping Behavior: All Countries

Q1. Do you personally do each of the following more often, as often, or less often than you did three years ago?

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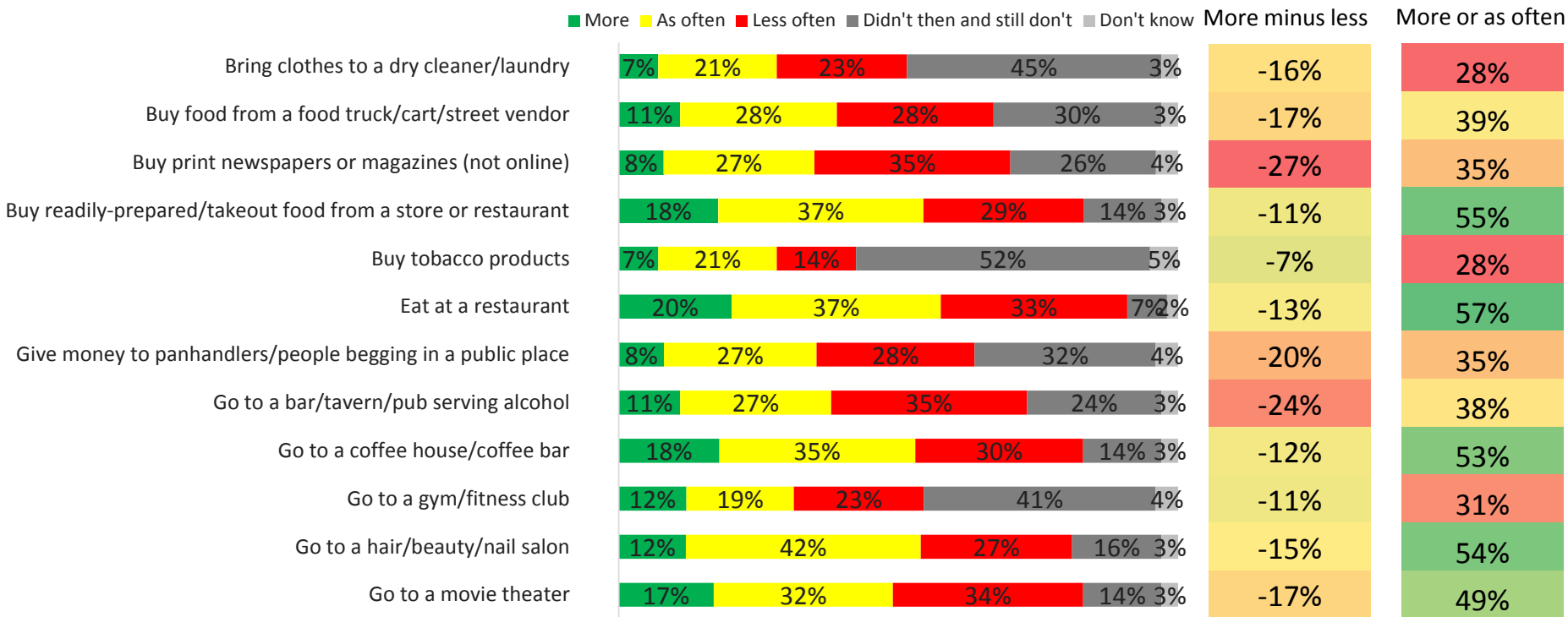
MORE OR AS OFTEN	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	SAU	SER	RSA	SKR	ESP	SWE	TUR	USA
Bank in person	45%	44%	34%	38%	49%	45%	32%	60%	55%	42%	35%	38%	37%	51%	42%	58%	60%	54%	41%	54%	58%	50%	34%	32%	46%	42%	43%	52%
Bank online	71%	63%	80%	83%	55%	84%	72%	80%	62%	66%	77%	83%	63%	78%	67%	55%	64%	47%	84%	79%	63%	59%	85%	65%	73%	81%	68%	75%
Buy appliances in person	55%	48%	60%	52%	51%	59%	57%	63%	67%	50%	53%	49%	44%	64%	47%	57%	66%	63%	59%	45%	62%	57%	60%	36%	59%	51%	45%	60%
Buy appliances online	43%	34%	32%	36%	55%	21%	41%	74%	35%	39%	53%	59%	31%	61%	39%	59%	44%	25%	60%	41%	39%	39%	30%	48%	40%	45%	47%	34%
Buy books in person	45%	45%	39%	38%	48%	42%	47%	59%	48%	47%	48%	43%	33%	56%	45%	49%	59%	50%	45%	36%	52%	50%	43%	33%	50%	42%	40%	46%
Buy books online	44%	24%	39%	34%	46%	43%	28%	71%	31%	43%	57%	60%	29%	61%	51%	57%	49%	17%	55%	36%	34%	32%	38%	54%	51%	51%	42%	54%
Buy clothes in person	65%	66%	65%	62%	64%	71%	68%	66%	80%	61%	65%	58%	66%	68%	62%	61%	79%	69%	67%	58%	65%	67%	74%	39%	70%	65%	70%	66%
Buy clothes online	48%	40%	45%	48%	47%	45%	46%	79%	36%	48%	62%	64%	27%	65%	45%	61%	47%	30%	55%	39%	41%	33%	33%	55%	53%	56%	51%	59%
Buy food in person	77%	78%	81%	68%	78%	86%	82%	76%	84%	68%	81%	80%	73%	71%	74%	78%	84%	80%	81%	82%	77%	84%	82%	46%	81%	76%	71%	86%
Buy food online	32%	20%	29%	21%	27%	26%	25%	82%	27%	32%	19%	45%	17%	54%	24%	53%	33%	17%	28%	29%	40%	16%	28%	49%	27%	34%	40%	35%
Buy furniture in person	50%	47%	55%	42%	53%	58%	47%	62%	52%	44%	53%	50%	36%	59%	49%	45%	64%	55%	68%	43%	56%	46%	50%	28%	54%	54%	37%	53%
Buy furniture online	26%	25%	18%	15%	37%	20%	22%	53%	19%	25%	33%	35%	10%	33%	23%	39%	28%	17%	31%	10%	27%	10%	10%	35%	25%	31%	22%	28%
Buy hardware products in person	53%	54%	62%	45%	38%	59%	60%	60%	61%	52%	65%	50%	27%	56%	47%	42%	68%	57%	71%	75%	59%	28%	59%	24%	59%	41%	46%	62%
Buy hardware products online	30%	15%	17%	32%	23%	23%	15%	68%	16%	52%	30%	46%	30%	48%	24%	33%	24%	12%	66%	41%	45%	13%	13%	27%	26%	24%	27%	32%
Buy medication or pers. care products in person	63%	72%	68%	52%	63%	75%	68%	68%	69%	50%	64%	66%	63%	63%	60%	60%	66%	58%	62%	73%	59%	67%	69%	39%	66%	64%	42%	73%
Buy medication or pers. care products online	31%	13%	21%	20%	35%	19%	18%	64%	29%	21%	48%	22%	23%	40%	30%	40%	30%	18%	42%	32%	32%	19%	13%	40%	29%	56%	30%	38%
Make travel reservations in person	32%	26%	26%	25%	34%	22%	32%	54%	31%	26%	37%	29%	15%	43%	24%	33%	37%	34%	41%	27%	53%	36%	32%	21%	29%	37%	41%	27%
Make travel reservations online	53%	40%	60%	51%	37%	46%	44%	76%	55%	43%	57%	71%	28%	72%	59%	54%	54%	43%	58%	39%	66%	31%	55%	50%	65%	68%	51%	59%
Shop in person at large retail stores	71%	64%	75%	73%	64%	75%	71%	74%	75%	63%	65%	69%	75%	77%	74%	68%	78%	64%	79%	79%	64%	74%	81%	47%	76%	80%	64%	69%
Shop in person at small retail stores	67%	71%	72%	59%	67%	74%	71%	74%	73%	52%	62%	69%	68%	72%	60%	65%	73%	70%	71%	76%	62%	76%	80%	41%	73%	68%	59%	69%

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Changes in Online & Offline Shopping Behavior: Global

Q2. Do you personally do each of the following more often, as often, or less often than you did three years ago?

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Changes in Local Shopping Behavior: All Countries

Q2. Do you personally do each of the following more often, as often, or less often than you did three years ago?

MORE MINUS LESS	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	KSA	SER	RSA	SKR	ESP	SWE	TUR	USA
Bring clothes to a dry cleaner/laundry	-16%	-19%	-16%	-15%	-12%	-21%	-18%	-13%	-24%	-23%	-16%	-18%	-10%	-4%	-28%	-16%	-13%	-15%	-15%	-15%	-15%	-21%	-18%	-18%	-14%	-10%	-24%	-11%
Buy food from a food truck/cart/street vendor	-17%	-30%	-21%	-27%	-11%	-22%	-13%	-15%	-13%	-23%	-27%	-20%	-25%	3%	-23%	-13%	-15%	-14%	-27%	-32%	-12%	-16%	-14%	-17%	-8%	-19%	-20%	-4%
Buy print newspapers or magazines (not online)	-27%	-37%	-27%	-27%	-21%	-29%	-30%	-19%	-34%	-22%	-24%	-28%	-28%	21%	-29%	-13%	-28%	-31%	-33%	-41%	-21%	-49%	-28%	-33%	-30%	-37%	-33%	-23%
Buy readily-prepared/takeout food from a store or restaurant	-11%	-24%	-24%	-24%	-8%	-14%	2%	19%	14%	-20%	-22%	-25%	-17%	-2%	-26%	-1%	4%	-5%	-16%	-22%	-4%	-25%	-22%	-8%	-11%	-13%	-10%	-9%
Buy tobacco products	-7%	-9%	-12%	-7%	0%	-10%	-7%	-10%	-9%	-6%	-8%	-9%	-8%	-3%	-11%	-3%	-15%	-14%	-13%	-8%	3%	-7%	0%	-11%	-10%	-1%	-5%	-2%
Eat at a restaurant	-13%	-29%	-17%	-25%	-9%	-17%	-15%	22%	14%	-33%	-9%	-10%	-21%	17%	-25%	-10%	0%	-1%	-12%	-46%	-6%	-43%	-25%	-10%	-14%	-21%	-13%	3%
Give money to panhandlers/people begging in a public place	-20%	-13%	-17%	-20%	-19%	-15%	-24%	-22%	-37%	-25%	-15%	-14%	-25%	-12%	-32%	-4%	-26%	-25%	-20%	-24%	-4%	-19%	-29%	-29%	-14%	-10%	-32%	-7%
Go to a bar/tavern/pub serving alcohol	-24%	-37%	-25%	-34%	-19%	-30%	-18%	-13%	-12%	-26%	-27%	-29%	-39%	-7%	-29%	-16%	-16%	-23%	-22%	-36%	NA	-34%	-29%	-25%	-19%	-33%	-13%	-18%
Go to a coffee house/coffee bar	-12%	-22%	-11%	-33%	-7%	-15%	-9%	-6%	20%	-28%	-15%	-6%	-28%	3%	-17%	-13%	1%	-19%	-20%	-37%	-12%	-36%	-19%	4%	-10%	-16%	5%	-3%
Go to a gym/fitness club	-11%	-15%	-11%	-11%	-2%	-8%	-8%	5%	-17%	-11%	-10%	-6%	-6%	1%	-21%	-4%	-11%	-33%	-13%	-21%	-14%	-15%	-23%	-21%	-11%	-6%	-13%	0%
Go to a hair/beauty/nail salon	-15%	-26%	-22%	-25%	-14%	-24%	-18%	-3%	3%	-12%	-14%	-15%	-17%	5%	-30%	-18%	-5%	-17%	-14%	-22%	0%	-21%	-25%	-17%	-20%	-10%	-20%	-5%
Go to a movie theater	-17%	-30%	-29%	-31%	-11%	-23%	-21%	21%	13%	-30%	-21%	-25%	-13%	3%	-33%	-15%	23%	-8%	-18%	-35%	-3%	-42%	-48%	2%	-21%	-22%	-28%	-18%

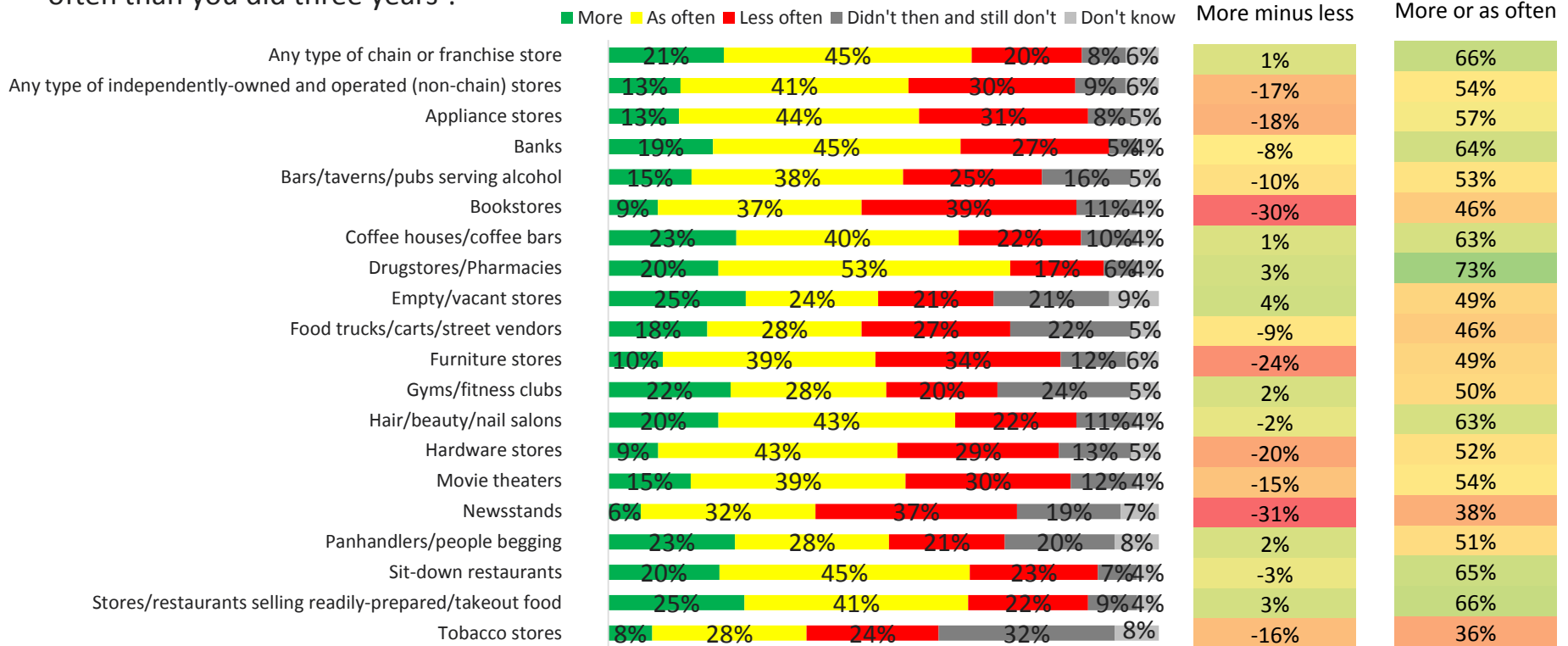
Changes in Local Shopping Behavior: All Countries

Q2. Do you personally do each of the following more often, as often, or less often than you did three years ago?

MORE OR AS OFTEN	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	KSA	SER	RSA	SKR	ESP	SWE	TUR	USA
Bring clothes to a dry cleaner/laundry	28%	20%	24%	21%	25%	21%	24%	52%	24%	18%	27%	22%	13%	59%	25%	50%	40%	27%	29%	17%	46%	14%	19%	38%	22%	32%	29%	28%
Buy food from a food truck/cart/street vendor	39%	36%	32%	31%	50%	31%	42%	63%	52%	26%	49%	30%	29%	63%	40%	38%	52%	48%	29%	20%	38%	11%	38%	37%	28%	52%	43%	38%
Buy print newspapers or magazines (not online)	35%	25%	32%	34%	30%	29%	28%	54%	30%	33%	44%	30%	28%	72%	39%	44%	43%	41%	38%	25%	35%	22%	31%	26%	37%	32%	36%	32%
Buy readily-prepared/takeout food from a store or restaurant	55%	46%	52%	40%	50%	60%	62%	79%	72%	37%	48%	47%	39%	65%	45%	68%	69%	63%	46%	40%	58%	42%	54%	49%	55%	64%	56%	65%
Buy tobacco products	28%	28%	21%	21%	27%	27%	29%	40%	11%	24%	40%	18%	30%	25%	29%	30%	23%	15%	36%	42%	36%	36%	31%	25%	26%	34%	33%	29%
Eat at a restaurant	57%	47%	57%	48%	55%	64%	56%	84%	74%	46%	64%	64%	42%	77%	52%	66%	65%	51%	25%	61%	31%	50%	47%	63%	59%	55%	72%	
Give money to panhandlers/people begging in a public place	35%	51%	27%	27%	36%	31%	50%	46%	33%	24%	26%	27%	22%	54%	24%	15%	47%	47%	44%	32%	56%	41%	36%	23%	41%	31%	29%	37%
Go to a bar/tavern/pub serving alcohol	38%	35%	38%	38%	37%	34%	42%	52%	50%	37%	41%	45%	20%	34%	41%	37%	46%	25%	40%	21%	N/A	33%	28%	31%	60%	44%	32%	40%
Go to a coffee house/coffee bar	53%	48%	49%	35%	47%	54%	56%	61%	81%	37%	57%	50%	32%	63%	58%	53%	66%	50%	50%	38%	47%	43%	47%	49%	69%	59%	65%	44%
Go to a gym/fitness club	31%	36%	25%	27%	36%	29%	31%	61%	41%	18%	26%	27%	22%	47%	27%	22%	47%	26%	24%	24%	34%	16%	26%	32%	38%	43%	38%	35%
Go to a hair/beauty/nail salon	54%	48%	38%	46%	52%	43%	51%	66%	67%	50%	58%	41%	44%	67%	46%	53%	68%	53%	68%	53%	59%	60%	45%	42%	60%	64%	56%	55%
Go to a movie theater	49%	47%	45%	33%	52%	46%	50%	78%	71%	41%	45%	49%	36%	66%	39%	46%	78%	58%	48%	46%	34%	26%	35%	55%	54%	55%	46%	49%

Changes in Local Retail Environment: Global

Q3. Thinking now about your local shopping areas, do you see each of the following more often, as often, or less often than you did three years ago?



Ipsos poll conducted September 22-October 6, 2017 among ca. 1,000+ adults aged 18-64 in each of the U.S. and Canada, 1000+ adults aged 16-64 in each of Australia, Brazil, China, France, Germany, Great Britain, Italy, Japan, and Spain and 500+ adults aged 16-64 in each of Argentina, Belgium, Chile, Colombia, Hungary, India, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden and Turkey.

Changes in Local Retail Environment: All Countries

Q3. Thinking now about your local shopping areas, do you see each of the following more often, as often, or less often than you did three years ?

MORE MINUS LESS	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	KSA	SER	RSA	SKR	ESP	SWE	TUR	USA
Any type of chain or franchise store	1%	-2%	-9%	-12%	-15%	-4%	1%	1%	26%	-10%	0%	-6%	-5%	-6%	-4%	0%	17%	11%	5%	11%	8%	8%	1%	7%	-2%	-15%	7%	0%
Any type of independently-owned and operated (non-chain) stores	-17%	-24%	-29%	-29%	-19%	-24%	-3%	-3%	8%	-26%	-32%	-25%	-21%	-7%	-31%	-28%	-4%	-3%	-17%	-19%	-3%	-25%	-7%	-19%	-26%	-17%	-20%	-19%
Appliance stores	-18%	-14%	-25%	-35%	-13%	-29%	-15%	-11%	-10%	-31%	-26%	-32%	-30%	-5%	-39%	-13%	-8%	-4%	1%	-10%	6%	-13%	-13%	-28%	-30%	-25%	-15%	-17%
Banks	-8%	-2%	-26%	-39%	-4%	-14%	-2%	-7%	12%	-19%	-18%	-39%	-28%	11%	-30%	-6%	8%	11%	13%	0%	0%	6%	9%	-19%	-29%	-41%	12%	3%
Bars/taverns/pubs serving alcohol	-10%	-11%	-16%	-29%	-5%	-15%	-8%	-5%	5%	-22%	-15%	-15%	-16%	-7%	-12%	-10%	0%	-9%	-13%	-19%	NA	-1%	-7%	-18%	-10%	-2%	-7%	-4%
Bookstores	-30%	-29%	-44%	-32%	-15%	-32%	-27%	-11%	-39%	-35%	-27%	-37%	-40%	-9%	-28%	-32%	-21%	-26%	-23%	-43%	-20%	-32%	-33%	-34%	-29%	-35%	-32%	-30%
Coffee houses/coffee bars	1%	-9%	12%	-18%	-10%	-1%	12%	7%	20%	-22%	-4%	29%	-23%	0%	-5%	-5%	12%	1%	-7%	1%	-5%	2%	6%	10%	-1%	2%	15%	15%
Drugstores/Pharmacies	3%	-3%	-4%	-10%	7%	0%	10%	0%	4%	-9%	-5%	-10%	-7%	2%	2%	17%	13%	18%	17%	16%	4%	26%	-1%	-9%	-4%	11%	-4%	3%
Empty/vacant stores	4%	20%	13%	16%	7%	11%	-2%	-15%	-6%	12%	10%	30%	5%	-14%	12%	22%	5%	-22%	-6%	6%	0%	-25%	-1%	-17%	22%	10%	-6%	11%
Food trucks/carts/street vendors	-9%	-7%	-10%	-18%	9%	-12%	4%	-17%	12%	-8%	-2%	-9%	-18%	0%	-18%	-20%	4%	3%	-18%	-33%	-5%	-29%	-8%	-17%	-7%	-9%	-27%	6%
Furniture stores	-24%	-28%	-24%	-41%	-21%	-24%	-36%	-18%	-24%	-31%	-14%	-31%	-30%	-17%	-40%	-15%	-19%	-20%	-7%	-17%	-20%	-33%	-31%	-30%	-34%	-18%	-21%	-18%
Gyms/fitness clubs	2%	-14%	7%	-9%	1%	1%	-8%	8%	11%	4%	14%	17%	10%	4%	-19%	5%	11%	2%	15%	1%	1%	0%	-3%	-15%	6%	13%	-2%	13%
Hair/beauty/nail salons	-2%	-18%	-6%	-10%	-1%	-6%	-1%	0%	17%	-9%	10%	16%	-11%	4%	-19%	-1%	1%	11%	-4%	12%	-1%	-1%	16%	-11%	-11%	-4%	-6%	-3%
Hardware stores	-20%	-26%	-16%	-30%	-24%	-17%	-25%	-25%	-14%	-21%	-10%	-36%	-23%	-17%	-33%	-6%	-14%	-20%	0%	-5%	-13%	-34%	-10%	-35%	-29%	-25%	-29%	-13%
Movie theaters	-15%	-26%	-27%	-33%	-9%	-22%	-11%	14%	22%	-20%	-17%	-19%	-19%	4%	-34%	-12%	17%	9%	-19%	-15%	-11%	-36%	-39%	-7%	-34%	-23%	-20%	-5%
Newsstands	-31%	-30%	-39%	-38%	-30%	-27%	-40%	-34%	-40%	-29%	-25%	-37%	-39%	-15%	-32%	-14%	-33%	-18%	-25%	-42%	-16%	-12%	-38%	-38%	-40%	-35%	-29%	-23%
Panhandlers/people begging	2%	8%	-13%	6%	11%	-2%	-1%	-30%	16%	3%	13%	12%	-7%	-13%	12%	-11%	17%	-8%	-11%	-8%	1%	12%	27%	-28%	3%	23%	6%	7%
Sit-down restaurants	-3%	-17%	-5%	-23%	-4%	-11%	1%	2%	21%	-18%	-2%	10%	-17%	6%	-17%	-6%	7%	15%	-11%	-17%	4%	-18%	6%	-3%	-10%	5%	-1%	1%
Stores/restaurants selling readily-prepared/takeout food	3%	-7%	-9%	-15%	-5%	-4%	8%	12%	21%	-11%	5%	15%	-10%	11%	-10%	-5%	23%	13%	8%	-8%	3%	10%	12%	-2%	0%	4%	6%	7%
Tobacco stores	-16%	-18%	-25%	-20%	-8%	-18%	-11%	-19%	-13%	-21%	-25%	-29%	-3%	-6%	-14%	-26%	-18%	-18%	-19%	-22%	-10%	-9%	-19%	-20%	-20%	-25%	3%	-4%

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Changes in Local Retail Environment: All Countries

Q3. Thinking now about your local shopping areas, do you see each of the following more often, as often, or less often than you did three years ?

MORE OR AS OFTEN	All Countries	ARG	AUS	BEL	BRA	CDN	CHL	CHN	COL	FRA	GER	GBR	HUN	IND	ITA	JPN	MEX	PER	POL	RUS	KSA	SER	RSA	SKR	ESP	SWE	TUR	USA
Any type of chain or franchise store	66%	62%	65%	59%	49%	75%	64%	75%	76%	57%	66%	67%	63%	60%	68%	73%	76%	63%	66%	71%	64%	72%	70%	55%	67%	61%	69%	73%
Any type of independently-owned and operated (non-chain) stores	54%	47%	52%	45%	45%	59%	60%	71%	75%	42%	45%	52%	50%	58%	52%	49%	65%	55%	60%	58%	49%	61%	60%	37%	57%	51%	52%	59%
Appliance stores	57%	60%	59%	44%	57%	48%	60%	67%	64%	44%	54%	45%	52%	63%	48%	65%	64%	55%	74%	68%	65%	65%	60%	31%	52%	51%	62%	51%
Banks	64%	68%	58%	45%	64%	71%	69%	67%	73%	56%	57%	47%	46%	71%	52%	75%	76%	68%	78%	70%	62%	75%	74%	45%	55%	43%	70%	74%
Bars/taverns/pubs serving alcohol	53%	54%	57%	49%	48%	49%	56%	60%	65%	45%	53%	59%	38%	42%	61%	55%	58%	45%	55%	40%	NA	62%	49%	39%	70%	61%	44%	57%
Bookstores	46%	50%	34%	45%	48%	46%	48%	65%	39%	39%	47%	42%	40%	61%	50%	52%	55%	48%	54%	38%	48%	49%	43%	33%	53%	41%	44%	42%
Coffee houses/coffee bars	63%	60%	67%	51%	55%	66%	66%	70%	81%	44%	62%	72%	34%	64%	69%	66%	72%	59%	64%	64%	56%	68%	64%	56%	76%	70%	70%	63%
Drugstores/Pharmacies	73%	75%	75%	70%	71%	81%	74%	74%	77%	71%	69%	74%	67%	68%	79%	80%	78%	75%	85%	76%	60%	80%	71%	50%	80%	77%	64%	78%
Empty/vacant stores	49%	60%	50%	55%	51%	50%	41%	38%	47%	52%	58%	65%	33%	41%	51%	65%	53%	31%	52%	49%	42%	44%	47%	27%	62%	57%	45%	53%
Food trucks/carts/street vendors	46%	49%	39%	38%	58%	43%	51%	60%	60%	38%	59%	47%	35%	63%	50%	39%	62%	53%	43%	31%	45%	23%	46%	35%	33%	55%	37%	47%
Furniture stores	49%	46%	51%	33%	49%	54%	41%	60%	52%	39%	57%	48%	39%	51%	36%	57%	57%	46%	66%	55%	45%	46%	45%	25%	48%	61%	49%	52%
Gyms/fitness clubs	50%	52%	48%	38%	49%	47%	43%	67%	60%	41%	53%	55%	44%	54%	42%	51%	62%	53%	61%	48%	52%	43%	51%	35%	53%	63%	51%	58%
Hair/beauty/nail salons	63%	60%	55%	58%	59%	65%	62%	69%	74%	58%	66%	62%	57%	65%	55%	69%	66%	63%	67%	76%	59%	68%	69%	44%	64%	65%	65%	59%
Hardware stores	52%	56%	58%	45%	39%	65%	51%	52%	64%	46%	61%	44%	22%	53%	44%	69%	62%	46%	78%	79%	51%	33%	62%	22%	56%	48%	45%	61%
Movie theaters	54%	49%	54%	40%	55%	53%	60%	76%	74%	52%	55%	56%	39%	65%	40%	57%	78%	65%	56%	55%	28%	33%	38%	51%	50%	52%	55%	63%
Newsstands	38%	39%	31%	38%	35%	24%	33%	43%	24%	31%	43%	28%	25%	51%	53%	58%	35%	52%	51%	37%	35%	69%	23%	18%	42%	38%	46%	22%
Panhandlers/people begging	51%	60%	35%	49%	59%	44%	60%	35%	65%	43%	56%	56%	39%	46%	53%	33%	65%	50%	52%	48%	51%	64%	65%	18%	61%	59%	47%	53%
Sit-down restaurants	65%	56%	69%	55%	58%	71%	67%	73%	83%	53%	70%	74%	47%	70%	62%	68%	73%	71%	60%	51%	63%	57%	73%	52%	72%	73%	66%	74%
Stores/restaurants selling readily-prepared/takeout food	66%	63%	66%	49%	59%	70%	64%	78%	79%	48%	67%	73%	49%	70%	64%	69%	78%	70%	67%	56%	61%	66%	74%	45%	68%	69%	65%	75%
Tobacco stores	36%	23%	29%	26%	28%	28%	32%	47%	24%	41%	41%	19%	45%	31%	58%	32%	33%	22%	52%	39%	40%	44%	35%	25%	49%	38%	53%	40%

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Methodology

- These are the findings of a Global Advisor survey on shopping behaviors. In total 19,000+ interviews were conducted between September 22 – October 6, 2017 among adults aged 18-64 in the United States and Canada, and adults aged 16-64 in all other countries.
- The survey was conducted in 27 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, Hungary, Italy, France, Germany, Great Britain, India, Japan, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey, and the United States.
- Between 500 and 1000+ individuals participated on a country by country basis via the Ipsos Online Panel. The sample was 1000+ in Australia, Brazil, Canada, China, France, Germany, Great Britain, Italy, Japan, Spain, and the United States. In all other countries the sample was 500+. The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.
- Where results do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of don't knows or not stated responses.
- Data are weighted to match the profile of the population.

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GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

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