PRESS RELEASE

American consumers want more ways to buy and pay in the future

Ipsos finds unprecedented disruption raised shoppers' expectations for retail

New York, March 15, 2021 – American consumers are unlikely to return to their old ways of buying things even as they gain confidence in the recovery from the pandemic. The massive disruption of 2020 has perhaps forever changed the ways people buy and pay, according to the latest issue of Ipsos' **What the Future** magazine.

Looking ahead, Ipsos data shows that while people miss in-person shopping, they prefer to shop both in-store and online equally. Shoppers plan to continue conveniences like "buy online, pick up in-store" and "buy now, pay later." They also want retailers and brands to make shopping seamless and easier to use across channels. That means better experiences in the physical, online and virtual shopping spaces. Consumers will continue to support brands that take a stand on issues from climate to gender to race.

In this issue of **What the Future**, Ipsos asks leading retail and brand thinkers four major questions:

- Steve Miller, senior vice president of strategy and analytics at DICK'S Sporting Goods – Will a seamless shopping experience everywhere help people buy more?
- Lisa Ellis, partner and senior equity analyst at MoffettNathanson – How will new ways to pay change how we shop?
- Cathy Hackl, tech futurist and CEO of the Futures Intelligence Group – Will the metaverse make shopping better?
- Afdhel Aziz, author and consultant – What purpose do brands serve?

The issue also features Ipsos researchers' guidance on how to answer these questions for consumers, society and brands. The full issue is here. Below are research highlights followed by a topline of the survey results:

- 38% of adults prefer to shop both in-store and online equally, if given the choice and there's zero risk for COVID-19, while 39% prefer in-store and 22% prefer online. For younger adults ages 18-34, the ratio changes as 41% prefer to shop both in-store and online equally, while 31% prefer in-store and 26% prefer online.
- 55% of people expect to shop online more than last year, including 66% of people ages 18-34, while 16% of people expect to shop online less than last year, including 14% of those ages 18-34.
- 96% of shoppers say the ease of the website shopping experience factors into where they shop.
- 69% of shoppers plan to maintain or increase their use of "buy online, pick up in-store" and curbside pick-up orders after the pandemic.
- 62% of shoppers ages 18-34 say they would likely use "buy now, pay later" financing if they had access to it.

- 60% of people would use an app to test furniture, household goods or home improvement items. Black and Hispanic adults overrepresent those who would use an app this way at 71% each.
- 62% of Americans support brands they feel do more good than harm to society.

Below are the findings of an Ipsos poll conducted between February 5-8, 2021. For this survey, a sample of 1,115 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.3 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

Full Annotated Questionnaire

1. Think about your favorite brand: How much of an impact do the following make on your purchase?

Total Extent Summary

	Total (N=1115)
Quality of the product	92%
Price of the product	82%
Convenience of purchasing the product	79%
Their stance and policies related to race, gender, politics, the environment, etc.	45%

a. Quality of the product

	Total
A great extent	68%
Some extent	24%
A little	6%
Not at all	2%
Don't know	1%
A great/Some Extent (Net)	*92%*

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b. Price of the product

	Total
A great extent	45%
Some extent	37%
A little	14%
Not at all	3%
Don't know	1%
A great/Some Extent (Net)	*82%*

c. Convenience of purchasing the product

	Total
A great extent	34%
Some extent	45%
A little	15%
Not at all	4%
Don't know	2%
A great/Some Extent (Net)	*79%*

d. Their stance and policies related to race, gender, politics, the environment, etc.

	Total
A great extent	17%
Some extent	28%
A little	24%
Not at all	26%
Don't know	5%
A great/Some Extent (Net)	*45%*

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2. How important are the following issues on your brand choices when shopping?

Total Extremely/Very Important Summary

	Total
Whether a brand is based or manufactures products in the U.S.	42%
A brand's policies and stances related to the environment and sustainability	40%
A brand's policies and stances related to race	36%
A brand's policies and stances related to gender	30%
Whether a brand is local to your community	28%
A brand's policies and stances related to LGBTQ+ issues	27%
Whether a brand is a small business	25%
A brand's policies and stances related to politics	24%

a. A brand's policies and stances related to gender

	Total
Extremely important	10%
Very important	20%
Somewhat important	28%
Not very important	23%
Not at all important	19%
Extremely/Very Important (Net)	*30%*
Not Very/Not At All Important (Net)	*42%*

b. A brand's policies and stances related to LGBTQ+ issues

	Total
Extremely important	9%
Very important	18%
Somewhat important	28%
Not very important	22%
Not at all important	22%
Extremely/Very Important (Net)	*27%*
Not Very/Not At All Important (Net)	*45%*

c. A brand's policies and stances related to politics

	Total
Extremely important	7%
Very important	17%
Somewhat important	30%
Not very important	26%
Not at all important	20%
Extremely/Very Important (Net)	*24%*
Not Very/Not At All Important (Net)	*46%*

d. A brand's policies and stances related to race

	Total
Extremely important	13%
Very important	23%
Somewhat important	27%
Not very important	20%
Not at all important	17%
Extremely/Very Important (Net)	*36%*
Not Very/Not At All Important (Net)	*37%*

e. A brand's policies and stances related to the environment and sustainability

	Total
Extremely important	12%
Very important	28%
Somewhat important	33%
Not very important	15%
Not at all important	12%
Extremely/Very Important (Net)	*40%*
Not Very/Not At All Important (Net)	*27%*

f. Whether a brand is local to your community

	Total
Extremely important	7%
Very important	21%
Somewhat important	41%
Not very important	21%
Not at all important	10%
Extremely/Very Important (Net)	*28%*
Not Very/Not At All Important (Net)	*31%*

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g. Whether a brand is a small business

	Total
Extremely important	7%
Very important	18%
Somewhat important	43%
Not very important	23%
Not at all important	9%
Extremely/Very Important (Net)	*25%*
Not Very/Not At All Important (Net)	*32%*

h. Whether a brand is based or manufactures products in the U.S.

	Total
Extremely important	13%
Very important	29%
Somewhat important	36%
Not very important	14%
Not at all important	8%
Extremely/Very Important (Net)	*42%*
Not Very/Not At All Important (Net)	*21%*

3. Have you ever purchased an item and paid for it in installments rather than paying the full payment when you purchased it?

	Total
Yes	59%
No	38%
Don't know	3%

4. **[Asked if Q3= "Yes"]** When you purchased that item and paid over time, which of the following did you use?

	Total (N=664)
Credit card	53%
Payment plan with the retailer	44%
Loan	27%
Payment plan with a buy-now, pay-later app	21%
Something else	2%

5. Several companies have established a financial practice known as "buy-now, pay-later" financing where people are given an opportunity to pay for something over several installments rather than all at once. If you had access to such a service, how likely would you be to use it?

	Total
Very likely	18%
Somewhat likely	36%
Not very likely	25%
Not at all likely	21%
Likely (Net)	*54%*
Not Likely (Net)	*46%*

6. When making a purchase online or in-store, how much thought do you give in choosing one payment form or another?

	Total
A lot	19%
A little	38%
Hardly any	27%
None at all	16%

7. When purchasing items online, what forms of payment do you prefer? (Select two)

	Total
Credit card	58%
Debit card	39%
PayPal	28%
A digital wallet (e.g. Google Pay, Apple Pay)	7%
Store card	5%
Other	2%

8. When purchasing items in a physical store, what forms of payment do you prefer? (Select two)

	Total
Credit card	49%
Debit card	46%
Cash	32%
A digital wallet (e.g. Google Pay, Apple Pay)	7%
PayPal	6%
Store card	5%
Check	3%
Other	1%

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9. To what extent, if at all, do the following factor into where you choose to shop?

Total A Great/Some Extent Summary

	Total
Price/value	89%
The ease of the website shopping experience	79%
Ease of the checkout experience	78%
Reliability of shipping timing	76%
Safety concerns (amount of people in the store, cleanliness, etc.)	73%
Return policies	72%
The ease of the mobile shopping experience, apps	60%
Availability of overnight or 2-day shipping	58%
Availability of same-day delivery	45%
Availability of curbside pickup	42%

a. Return policies

	Total
A great extent	37%
Some extent	35%
A little	21%
Not at all	7%
Don't know	1%
A Great/Some Extent (Net)	*72%*

b. Availability of curbside pickup

	Total
A great extent	16%
Some extent	26%
A little	25%
Not at all	32%
Don't know	1%
A Great/Some Extent (Net)	*42%*

c. The ease of the website shopping experience

	Total
A great extent	40%
Some extent	39%
A little	14%
Not at all	6%
Don't know	1%
A Great/Some Extent (Net)	*79%*

d. The ease of the mobile shopping experience, apps

	Total
A great extent	28%
Some extent	32%
A little	19%
Not at all	19%
Don't know	2%
A Great/Some Extent (Net)	*60%*

e. Safety concerns (amount of people in the store, cleanliness, etc.)

	Total
A great extent	40%
Some extent	33%
A little	18%
Not at all	8%
Don't know	1%
A Great/Some Extent (Net)	*73%*

f. Availability of same-day delivery

	Total
A great extent	19%
Some extent	26%
A little	26%
Not at all	27%
Don't know	2%
A Great/Some Extent (Net)	*45%*

g. Availability of overnight or 2-day shipping

	Total
A great extent	24%
Some extent	34%
A little	25%
Not at all	16%
Don't know	1%
A Great/Some Extent (Net)	*58%*

h. Reliability of shipping timing

	Total
A great extent	38%
Some extent	38%
A little	18%
Not at all	4%
Don't know	1%
A Great/Some Extent (Net)	*76%*

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i. Ease of the checkout experience

	Total
A great extent	39%
Some extent	39%
A little	18%
Not at all	3%
Don't know	1%
A Great/Some Extent (Net)	*78%*

j. Price/value

	Total
A great extent	63%
Some extent	26%
A little	9%
Not at all	2%
Don't know	0%
A Great/Some Extent (Net)	*89%*

10. Would you use an app to do any of the following:

Total Yes Summary

	Total
Try on glasses	62%
Test furniture, household goods, home improvement items	60%
Try on clothes	53%
Take a virtual test drive	50%
Try makeup, hair color, nail colors-designs	49%

a. Try on clothes

	Total
Yes, I already have	7%
Yes, I would try it	33%
Yes, but only if that was the only option	13%
No	47%
Yes (Net)	*53%*

b. Try makeup, hair color, nail colors-designs

	Total
Yes, I already have	7%
Yes, I would try it	33%
Yes, but only if that was the only option	9%
No	51%
Yes (Net)	*49%*

c. Test furniture, household goods, home improvement items

	Total
Yes, I already have	7%
Yes, I would try it	36%
Yes, but only if that was the only option	17%
No	40%
Yes (Net)	*60%*

d. Try on glasses

	Total
Yes, I already have	10%
Yes, I would try it	37%
Yes, but only if that was the only option	15%
No	38%
Yes (Net)	*62%*

e. Take a virtual test drive

	Total
Yes, I already have	4%
Yes, I would try it	30%
Yes, but only if that was the only option	16%
No	50%
Yes (Net)	*50%*

11. **[Item asked only if selected "I already have" for the item in Q10]** How likely are you to use an app again for the following?

Total Likely Summary

	Total
Take a virtual test drive	(N=48) 87%
Try makeup, hair color, nail colors-designs	(N=73) 86%
Try on glasses	(N=113) 86%
Try on clothes	(N=72) 79%
Test furniture, household goods, home improvement items	(N=83) 77%

a. Try on clothes

	Total (N=72)
Very likely	46%
Somewhat likely	33%
Not very likely	13%
Not at all likely	8%
Likely (Net)	*79%*
Not Likely (Net)	*21%*

b. Try makeup, hair color, nail colors-designs

	Total (N=73)
Very likely	49%
Somewhat likely	37%
Not very likely	14%
Not at all likely	0%
Likely (Net)	*86%*
Not Likely (Net)	*14%*

c. Test furniture, household goods, home improvement items

	Total (N=83)
Very likely	49%
Somewhat likely	28%
Not very likely	18%
Not at all likely	6%
Likely (Net)	*77%*
Not Likely (Net)	*23%*

d. Try on glasses

	Total (N=113)
Very likely	52%
Somewhat likely	34%
Not very likely	11%
Not at all likely	3%
Likely (Net)	*86%*
Not Likely (Net)	*14%*

e. Take a virtual test drive

	Total (N=48)
Very likely	38%
Somewhat likely	49%
Not very likely	7%
Not at all likely	6%
Likely (Net)	*87%*
Not Likely (Net)	*13%*

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12. What concerns, if any, do you have in using virtual reality or augmented reality tools to select and purchase items? Select all that apply.

	Total
Not getting the right thing	48%
Quality	46%
Technical glitches	35%
Privacy	32%
Something else	5%
No concerns	14%

13. For each of the statements below, indicate your level of agreement.

Total Agree Summary

	Total
Even if it's a small amount, I can put money away each month	70%
I feel like I have enough saved in case something unplanned happens (i.e. home repairs, car repairs etc.)	55%
I believe I will be better off than my parents	51%
After paying my bills, I do not have money left to spend on the things I want	32%
I worry about paying all of my bills each month	32%

a. Even if it's a small amount, I can put money away each month

	Total
Strongly agree	33%
Somewhat agree	37%
Neither agree nor disagree	14%
Somewhat disagree	10%
Strongly disagree	6%
Agree (Net)	*70%*
Disagree (Net)	*16%*

b. I feel like I have enough saved in case something unplanned happens (i.e. home repairs, car repairs etc.)

	Total
Strongly agree	23%
Somewhat agree	31%
Neither agree nor disagree	17%
Somewhat disagree	15%
Strongly disagree	13%
Agree (Net)	*55%*
Disagree (Net)	*28%*

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c. I believe I will be better off than my parents

	Total
Strongly agree	22%
Somewhat agree	29%
Neither agree nor disagree	30%
Somewhat disagree	12%
Strongly disagree	7%
Agree (Net)	*51%*
Disagree (Net)	*19%*

d. After paying my bills, I do not have money left to spend on the things I want

	Total
Strongly agree	11%
Somewhat agree	20%
Neither agree nor disagree	21%
Somewhat disagree	24%
Strongly disagree	24%
Agree (Net)	*32%*
Disagree (Net)	*48%*

e. I worry about paying all of my bills each month

	Total
Strongly agree	13%
Somewhat agree	19%
Neither agree nor disagree	18%
Somewhat disagree	22%
Strongly disagree	28%
Agree (Net)	*32%*
Disagree (Net)	*50%*

14. What do you really want to do more of post-COVID-19? Select all that apply.

	Total
Shopping in-store for things like clothing, beauty products, home goods	41%
The human interaction of shopping at stores in person	41%
The adventure of going downtown or to the mall	37%
Shopping for fun	36%
Self-serve food stations at grocery stores like salad bars and hot bars	27%
None of these	21%

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About the Study

These are some of the findings of an Ipsos poll conducted between February 5-8, 2021. For this survey, a sample of 1,115 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel (see link for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.3 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,115, DEFF=1.5, adjusted Confidence Interval=+/-4.8 percentage points).

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About Ipsos

Ipsos is the world's third largest Insights and Analytics company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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