PULSE
Global Survey

Pulse is a bi-annual survey of 1,500 respondents across UK, US, GCC, China and India

Key Findings and Insights

PRAGMA + BENOY

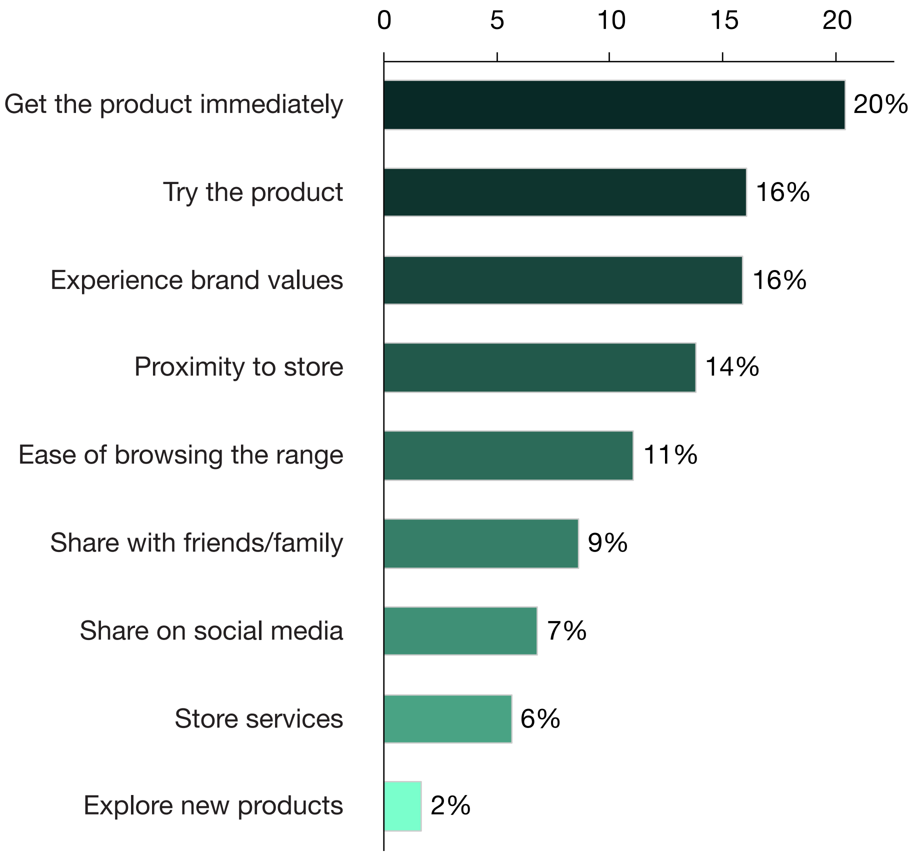
Shopping in a Physical Store rather than Online

Question: Please select the top 3 reasons why you would choose to shop in a physical store rather than online?

Shopping in a Physical Store rather than Online

Getting the product immediately is the main reason for shopping in a physical store across most geographies and demographic groups.Trying the product is most important for IN, GCC and young consumers. Proximity is important to US and older consumers. Brand values are important to CN, GCC and ages 25-34

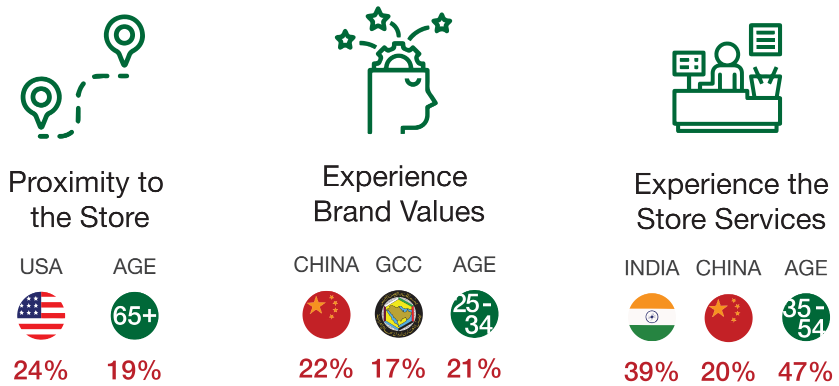
Reasons for Shopping in a Physical Store



Most Important Reasons for Shopping in a Physical Store

34% Prioritise physical stores for immediacy/convenience, showing the need for the store location to be appropriate

32% Prioritise physical stores to engage with the product and/or brand, showing the need for the store content and environment to be appropriate

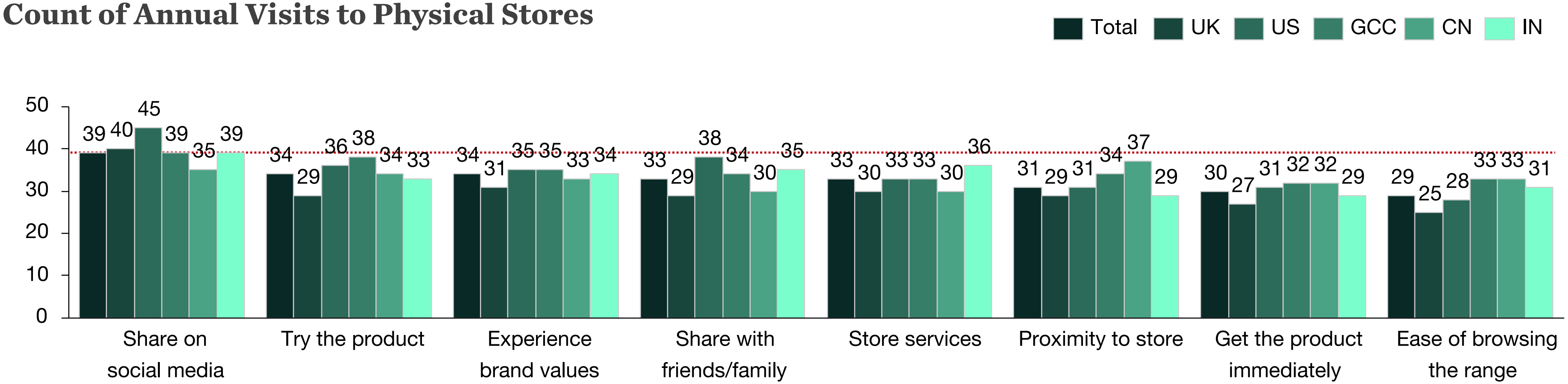


Frequency of Visits to Physical Stores vs Reasons to Shop In-Store

Average Offline Shopping Frequency

Higher frequency visitors to physical stores identify sharing their shopping experiences on social media as a key reason for their visit, with this behaviour more prevalent in the US. While in India, higher frequency visits are associated with a desire to experience store services.

Count of Annual Visits to Physical Stores



Consumers who **identify sharing** their **experience** on **social media** as a key reason for their visit, have the **highest overall frequency.**

In **India**, higher frequency of **visit to a physical store** is associated with **experiencing the store's services**

In the **US** and **GCC** countries, **trying products** and **experiencing brand values** is associated with **higher visit frequency.**

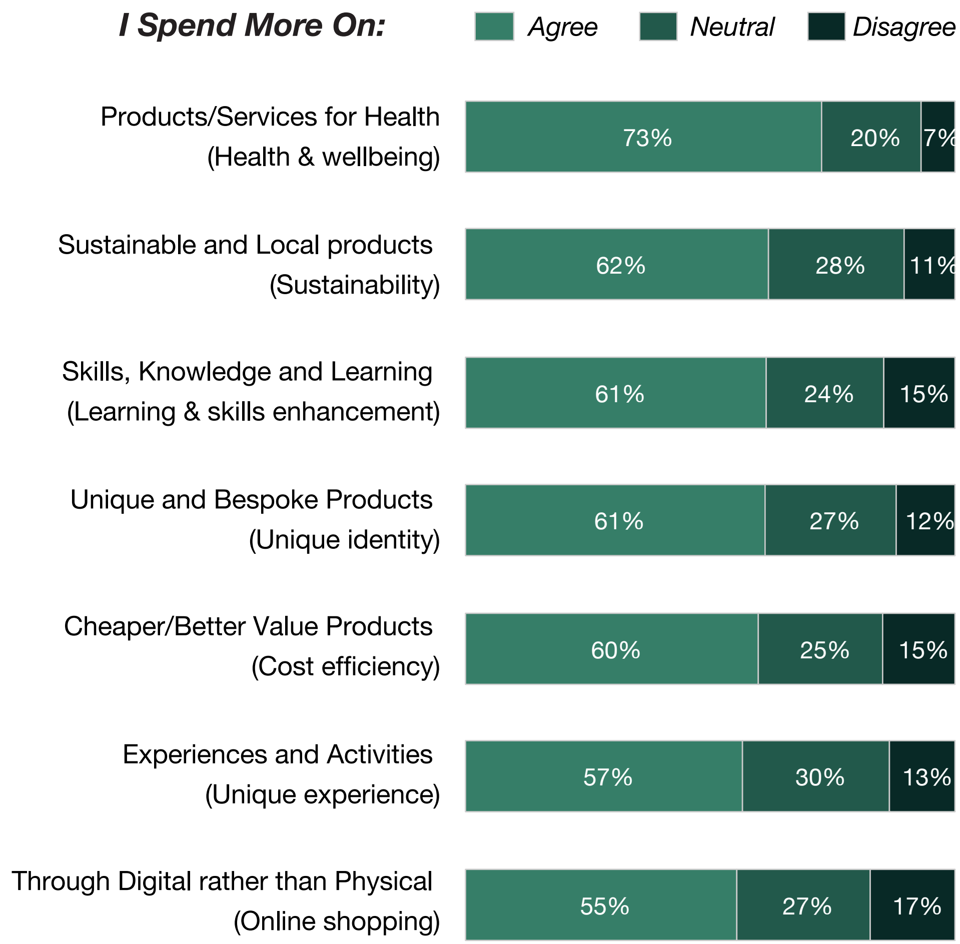
For consumers in **China**, **proximity to store** is associated with **higher visit frequency**

Spending Habits

Question: To what extent do you agree with the following statements in describing your spending habits, on a scale of agree to disagree?

Most consumers across geographies describe health and wellbeing as a key influence on their shopping habits. In the UK and US, value is a key influence, while GCC, Chinese and Indian consumers identify the important of learning and skills enhancement.

Best Descriptions of Spending Habits



Key Insights

The majority of consumers across all geographies describe health and wellbeing as a key influence on their spending habits

UK (56%) and US (58%) consumers describe value as a key influence on their spending habits

GCC (75%), Chinese (70%) and Indian (77%) consumers describe learning and skills enhancement as a key influence on their spending habits

Indian (82%) and Chinese (70%) consumers describe interest in authentic and local sustainable products as a key influence on their spending habits

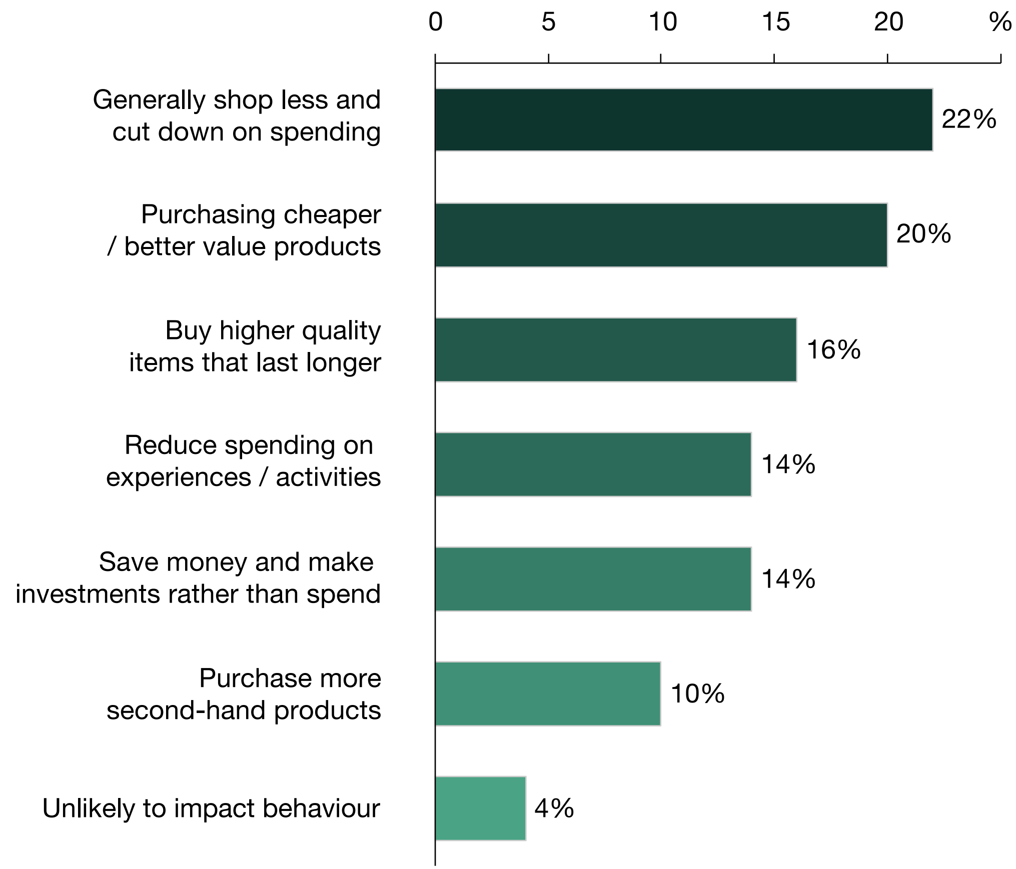
Impact of Inflation on Spending Behaviour

Question: If the price of products and inflation rises significantly this year, how is this likely to impact your behaviour? Please select up to 3 that apply

Impact of Inflation on Spending Behaviour

In response to inflation, a significant proportion of consumers identify shopping less/cutting down on spending and purchasing cheaper/better value products as a key impact. In the UK and US younger consumers are more likely than other age groups to switch to cheaper/better value products, while Chinese, GCC and Indian consumers are more likely to buy higher quality items. Older consumers are more likely to reduce spending on experiences and activities.

Impact of Inflation on Spending Behaviour



Key Insights

16%

Buy higher quality items that last longer

Chinese (22%), GCC (22%) and Indian (18%) consumers are more likely to purchase higher quality items that last longer

20%

Switch to purchasing cheaper / better value

UK (23%) and US (21%) consumers are most likely to switch to cheaper / better value products, as well as ages 18-44 (20%)

14%

Reduce spending on experiences and activities

Older consumers aged 65+ are most likely to reduce spending on experiences / activities (18%)

22%

Generally shop less and cut down on spending

Consumers aged 45+ are most likely to cut down on spending (25%)

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PRAGMA

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