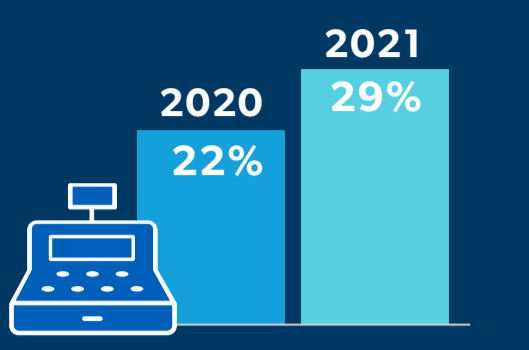


# Shifting Consumer Preferences

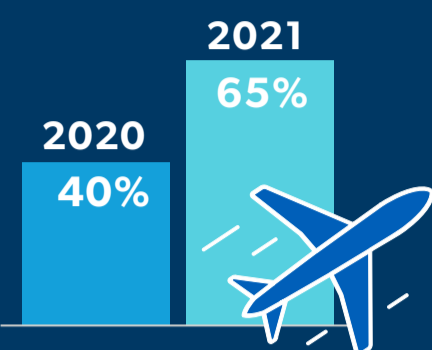
How consumers' perceptions, technology use, and purchasing behaviors have evolved in the last year

Spending is back, but with an eye toward the future and a focus on essentials

Nonessential spending is on the rise, which may signal consumer confidence



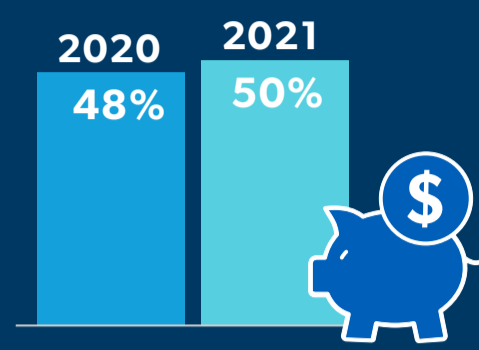
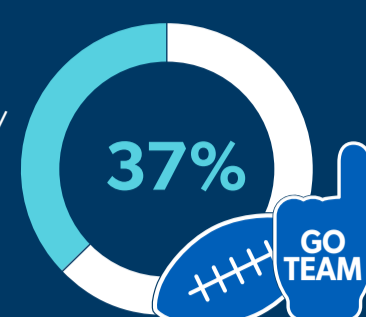
Non-essential spending increased **7%** from 2020 to 2021



There has been a **25%** increase in overall reported travel from 2020 to 2021

Nevertheless, consumers still continue to prioritize essentials and saving

Spending on live sporting events/entertainment has decreased in the past six months



63% want to save more money, but without significant increases in salaries, half noted no change in savings contributions

Being accessible and inclusive has a significant influence on purchasing

Customer service remains critical, but accessibility and inclusivity have emerged as key influencers



**64%** ranked a business being inclusive and accessible to everyone, including those with disabilities, as influential on purchasing decisions



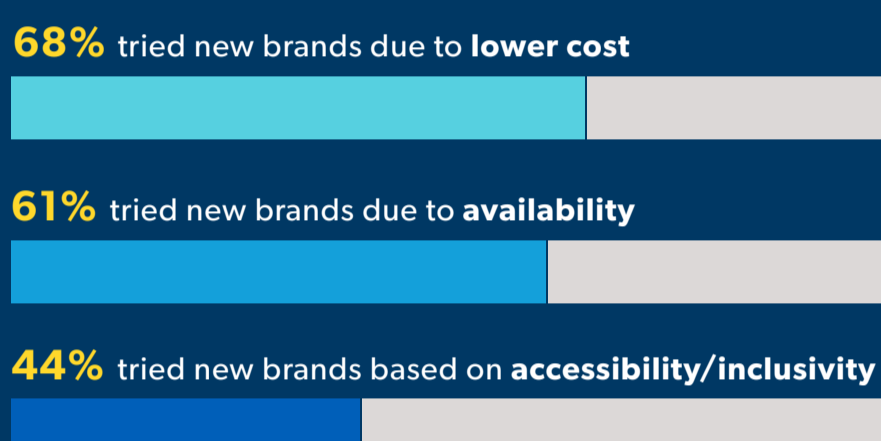
**44%** of consumers have tried new brands based on their inclusivity and accessibility



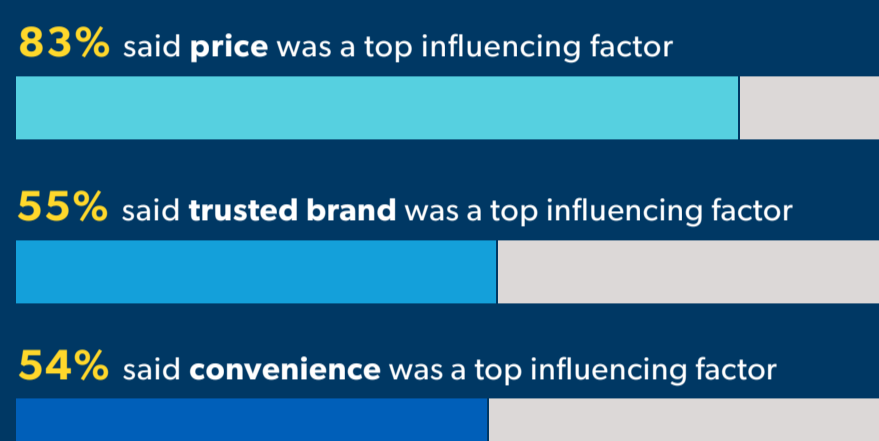
Accessibility/Inclusivity has become an important factor to many, especially those in the Gen Z age group (18-26)

The price must be right, but availability and trusted brands are also valued

Cost, availability and accessibility/inclusivity influence purchasing decisions most heavily



Price remains the dominating factor for selecting a product or service



Discounts and convenience services like curbside pickup drive consumer purchasing



**69%** are influenced by discounting or waiving shipping/delivery fees



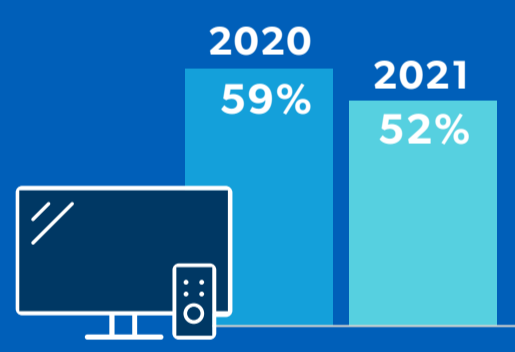
**45%** are influenced by free curbside and in-store pickup

Digital savviness and consumption are here to stay

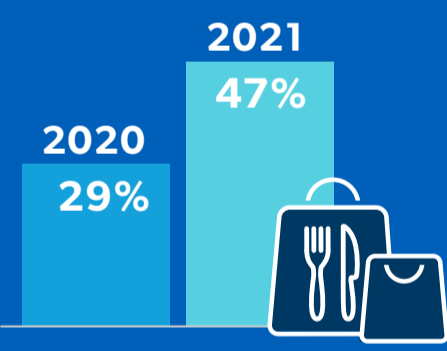
The use of digital products & capabilities continues to increase among consumers



Digital behaviors continue to increase despite **51%** of consumers returning to onsite work



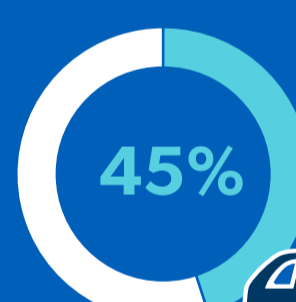
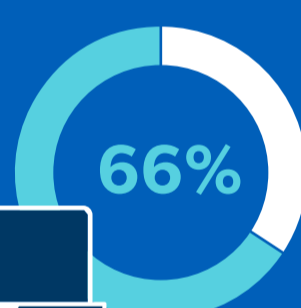
Streaming entertainment has remained steady in its increase



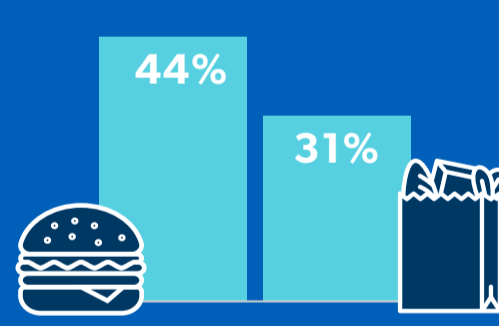
Restaurant and grocery pickup, delivery, and buying products online and picking them up in store increased **18%** from pre-pandemic

Services & tech that increase convenience for consumers are very likely to see continued use

**2/3** would like to continue shopping online



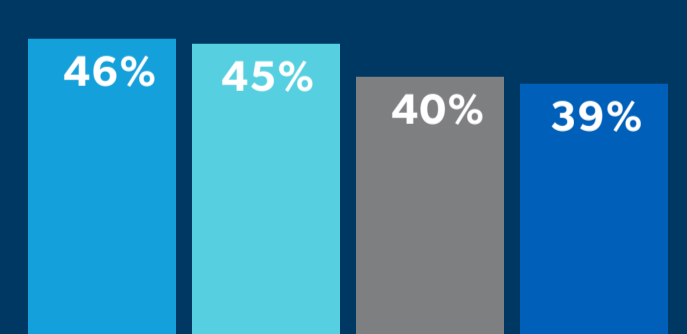
Nearly **1/2** would like to continue to use curbside pickup or drive up using an app



Food and grocery delivery also ranked highly among respondents

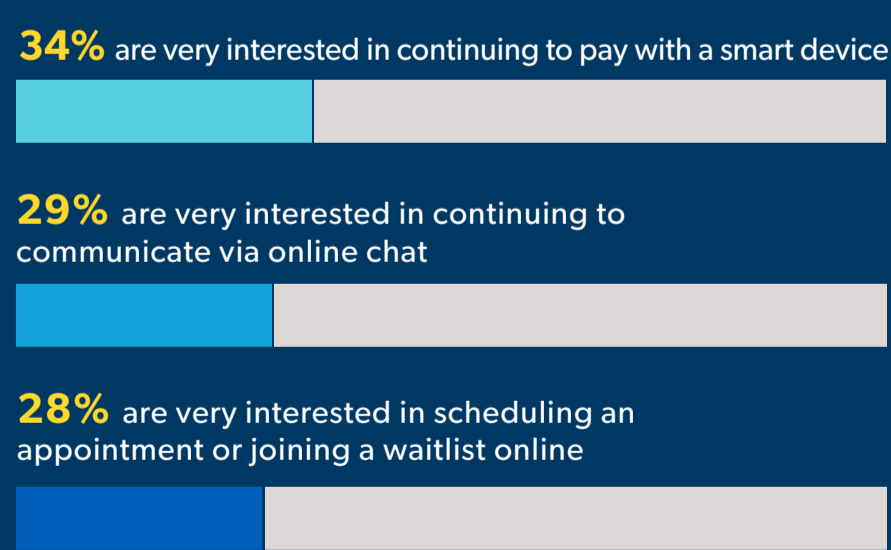
Innovative technologies continue to meet changing needs

Almost half of consumers used live chat and made a virtual appointment in the last six months



Using online chat for customer service (**46%**), attending virtual appointments (**45%**), paying with a smart device in a physical setting (**40%**), and scheduling an appointment/joining a waitlist online (**39%**) ranked among the activities consumers have engaged in during the last six months

Consumers want to keep paying with their smart devices, using live chat, and joining waitlists online



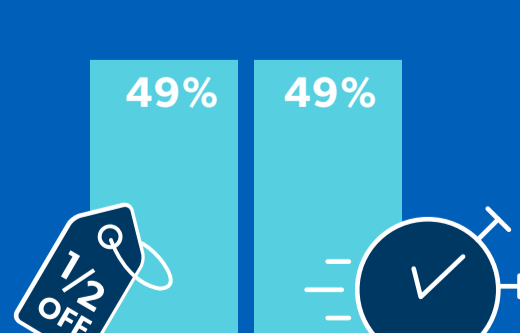
Personalization and convenience drive data sharing

Consumers are willing to exchange personal data for greater personalization



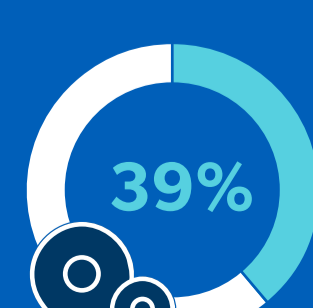
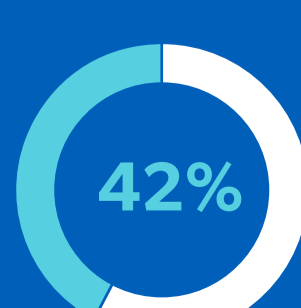
**45%** of consumers have used personalized correspondence, sales, ads, and product recommendations when making a purchasing decision

Half of consumers are willing to share data in exchange for discounts, perks, & convenience



Discounts/perks and convenience both have the greatest affect on why consumers would have to share their personal information

Status level benefits have the least affect on why consumers would share their personal information



More than a third of consumers have used location-based information when making a purchasing decision