

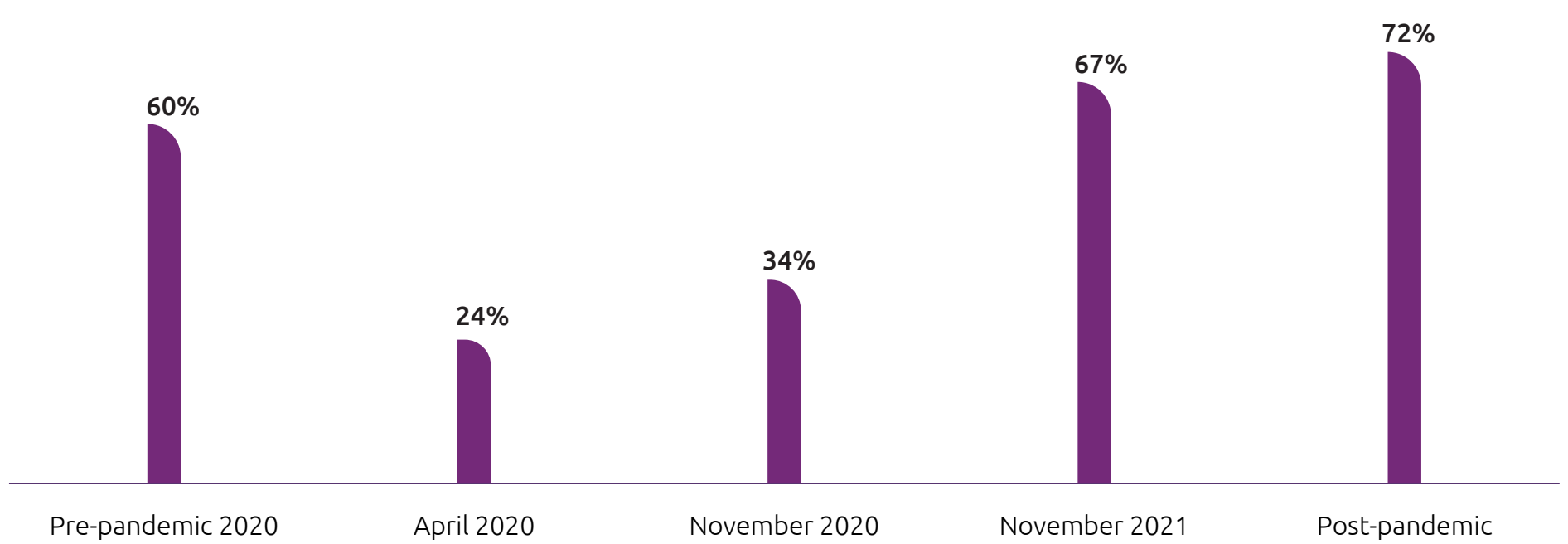
WHAT MATTERS TO TODAY'S CONSUMER

2021 consumer behavior tracker for the Consumer Products and Retail industries

Consumers return to in-store shopping but ecommerce remains strong

Consumer preference for in-store shopping surpasses pre-pandemic levels

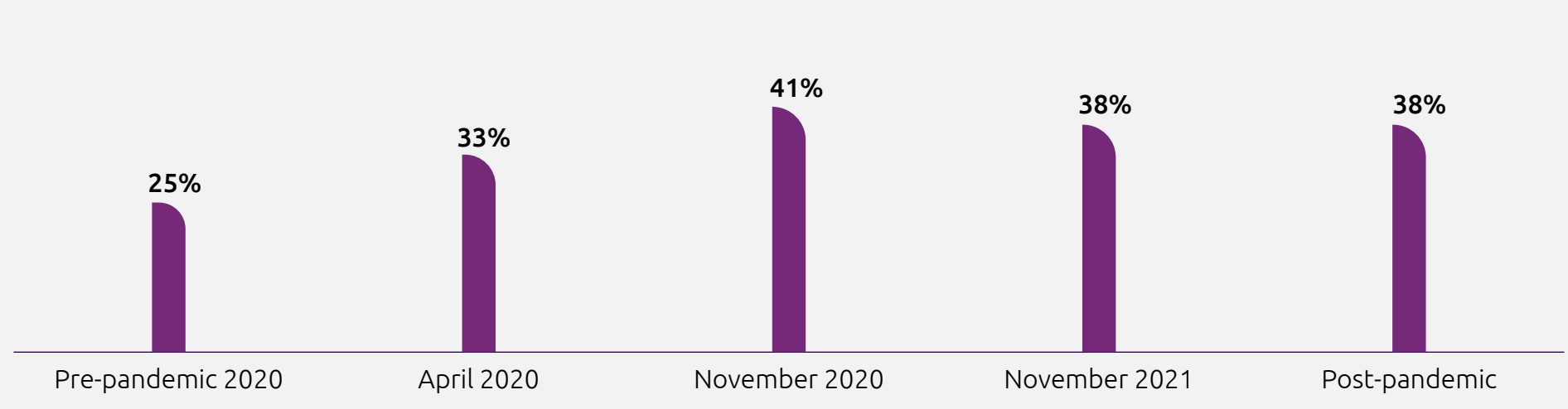
Percentage of consumers shopping at physical stores



Source: Capgemini Research Institute, consumer demand survey, October–November 2021, N=10,179 consumers; Capgemini Research Institute, The great consumer reset: COVID-19 and the consumer products and retail consumer, November 2020.

Consumer preference for online shopping stabilizes

Percentage of consumers shopping online with retailers



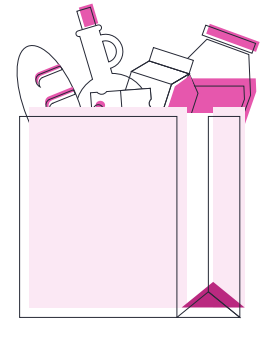
Source: Capgemini Research Institute, consumer demand survey, October–November 2021, N=10,179 consumers; Capgemini Research Institute, The great consumer reset: COVID-19 and the consumer products and retail consumer, November 2020.

Delivery and fulfillment services gain importance

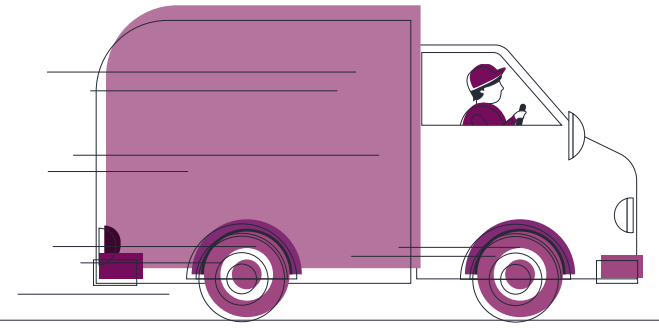
Grocery and health and beauty shoppers put a higher value on **delivery-related** aspects when compared to in-store experiences



Delivery and fulfillment is most important to **Millennial grocery shoppers (56%)** and least important to **Boomers (26%)**



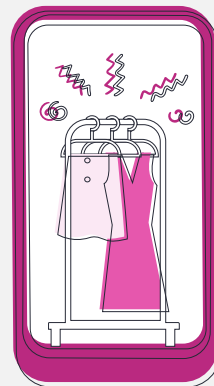
Many shopper segments are **willing to pay a premium for fast delivery**, including younger shoppers, shoppers with children, and urban shoppers



Shoppers are happy to order direct from brands

41%

of shoppers have ordered directly from brands, rather than retailers



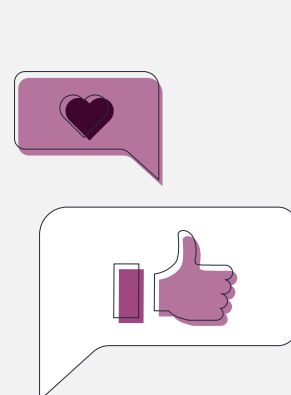
68%

of Gen Z shoppers, and 58% of Millennials versus 21% of Boomers have ordered direct from brands



60%

of all shoppers say they get a better buying experience when buying directly from brands



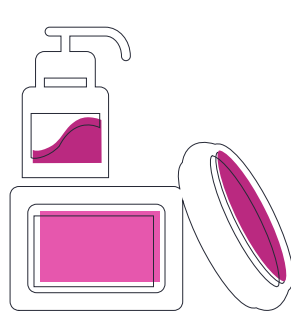
45%

of all shoppers say they are willing to share data with brands on how they consume or use products

Consumers' top priority is healthy, sustainable living – and making purchases that reflect this

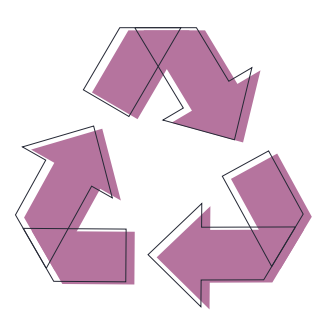
69%

of consumers agreed that post-pandemic, they will be more careful in terms of maintaining and protecting their personal health



60%

of shoppers say that post-pandemic, sustainability will be more important to them when deciding what products to buy



Consumers do not expect sustainability to come at a high price indefinitely –

72%

say that sustainable products should not be more expensive than similar products that are non-sustainable.



How brands and retailers can capitalize on evolving consumer tastes



Collect and analyze first-party consumer data to customize new products and services for specific customer segments



Develop an omni-channel strategy that incorporates the roles of in-store, ecommerce, direct to consumer, and marketplaces



Reposition delivery and fulfillment services as a growth driver central to the customer experience



Set pricing of sustainable products more competitively in line with consumer expectations

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