

What will shopping be like post-Covid-19?

TRANSPARENCY IN RETAIL

The global pandemic, lockdown and social distancing and hygiene measures have transformed our shopping habits. Our analysis points in the direction of an acceleration in retail towards omni-channel models.

Cushman & Wakefield has carried out the only survey in Spain aimed at understanding consumer interactions before, during and after the Covid-19 crisis.

Social distancing and hygiene and safety requirements will inevitably impact shopping over the coming months. In this report, we analyse the forms and formats favoured by shoppers within this new paradigm.

The results are also available for the Belgian, Dutch, Luxembourg and French markets, and represent more than 5,000 responses.

MAY 2020



**CUSHMAN &
WAKEFIELD**

6 Main conclusions

1. Although lockdown has speeded up the **adoption of omni-channel* models in retail, in-store shopping prevails.**
2. Consumers express a **need for bricks and mortar retail**, mainly in terms of the shopping experience and hostelry.
3. **Local shops** near to the home and city shopping centres appear as the preferred retail options when asked about returning to physical spaces.
4. **Hygiene** in retail spaces appears as the main factor in ensuring customer safety in high street premises, shopping centres and retail parks.
 - Measures such as **6 Feet Retail by Cushman & Wakefield**** enable businesses to operate safely in terms of possible Covid-19 contagion, and are now essential for the functioning of retail establishments.
5. **The most immediate return will be to hostelry spaces**, followed by shopping centres and high street premises and, finally, leisure establishments.
 - The latter will begin operating again in around three months' time.
 - Consumers **do not express a vital need for a vaccine against** Covid-19 in order for them to return to physical shopping.
6. **More than 80% of respondents state that they will use e-commerce** following the Covid-19 crisis.
 - Nevertheless, **two thirds declare that they will frequently or solely use physical channels.**

*Omni or multi-channel sales: Consists of a retailer strategy that seeks to distribute or sell products through various channels, such as physical stores, online sales with home delivery or online sales with store delivery.

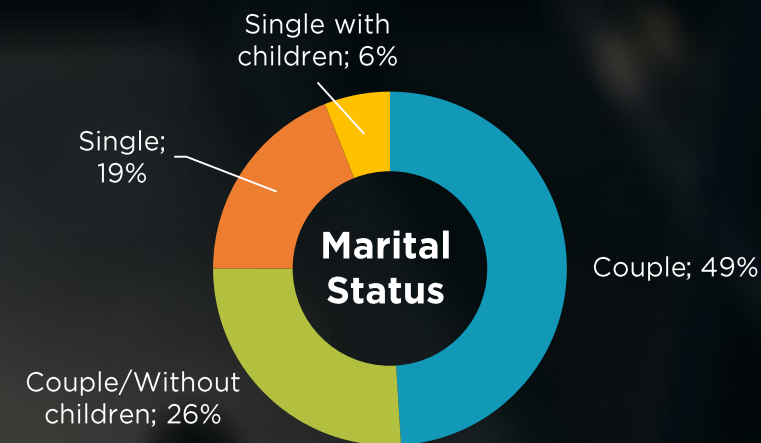
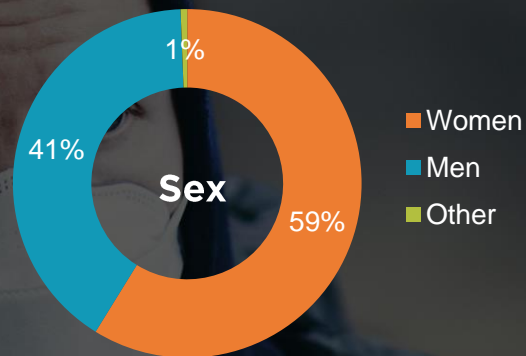
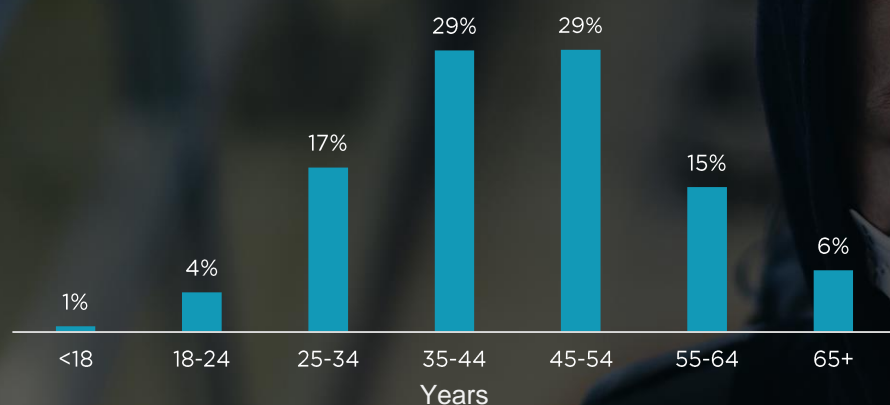
** By means of its **6 Feet Model**, Cushman & Wakefield is leading the development of best practices, products and collaboration with its clients to ensure recovery following COVID-19. [Click here](#) for further information.



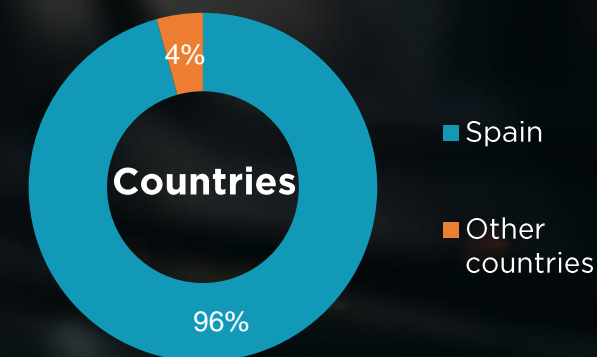
Survey profile

2,282 participants (May 4 - 13, 2020)

Age ranges



By autonomous region



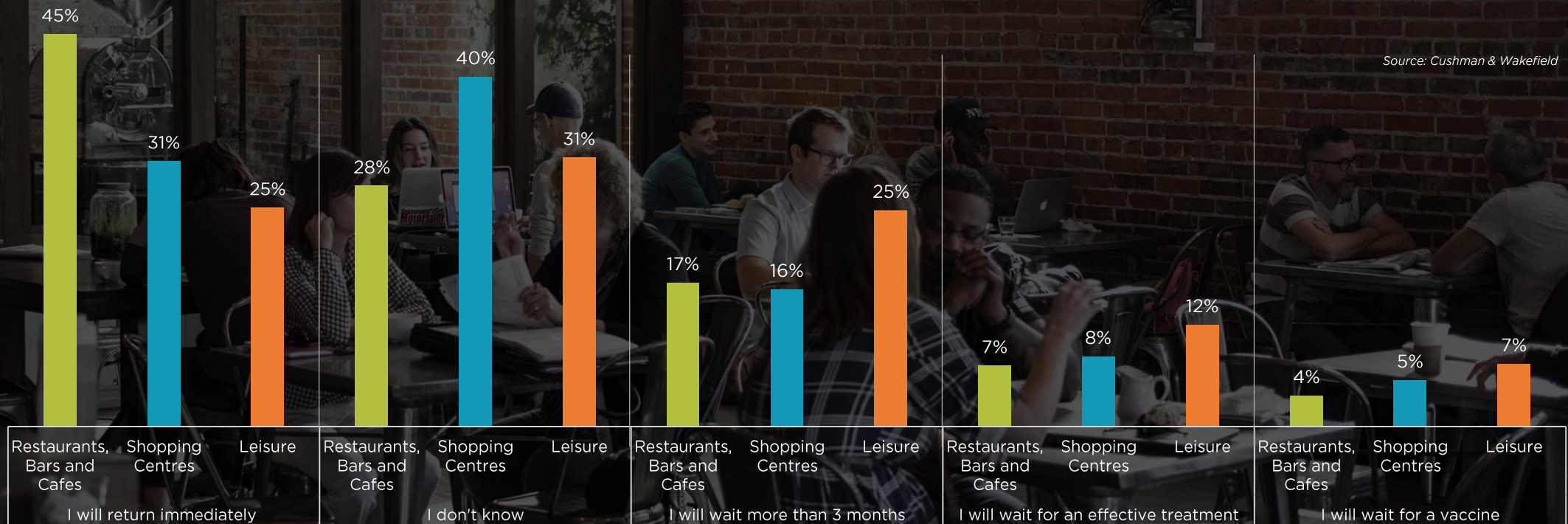
Source: Cushman & Wakefield

Time to return to physical shopping

- **45%** of consumers state that they will return immediately to restaurants, bars and cafes.
- **31%** of the respondents claim that they will return immediately to Shopping Centres.
- Consumers will take longer to return to leisure establishments

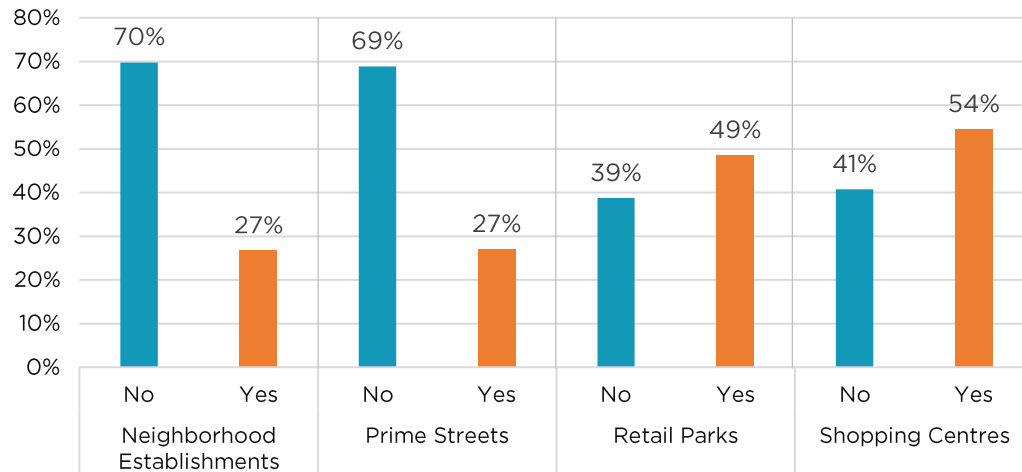
The survey participants were asked how long they would take to return to establishments once the necessary social distancing, hygiene and disinfection measures had been implemented.

When will customers return to physical premises?



Return to in-store shopping

Concern regarding returning to shopping



Source: Cushman & Wakefield



Consumers will try to avoid crowds

- Some 70% of survey participants state that they are not concerned about returning to shopping in neighbourhood establishments (markets or local shops) or high-street shops.
- Customers will try to avoid crowds, at least during the coming weeks. They appear more cautious in terms of visiting shopping centres or retail parks.

Visits to retail premises

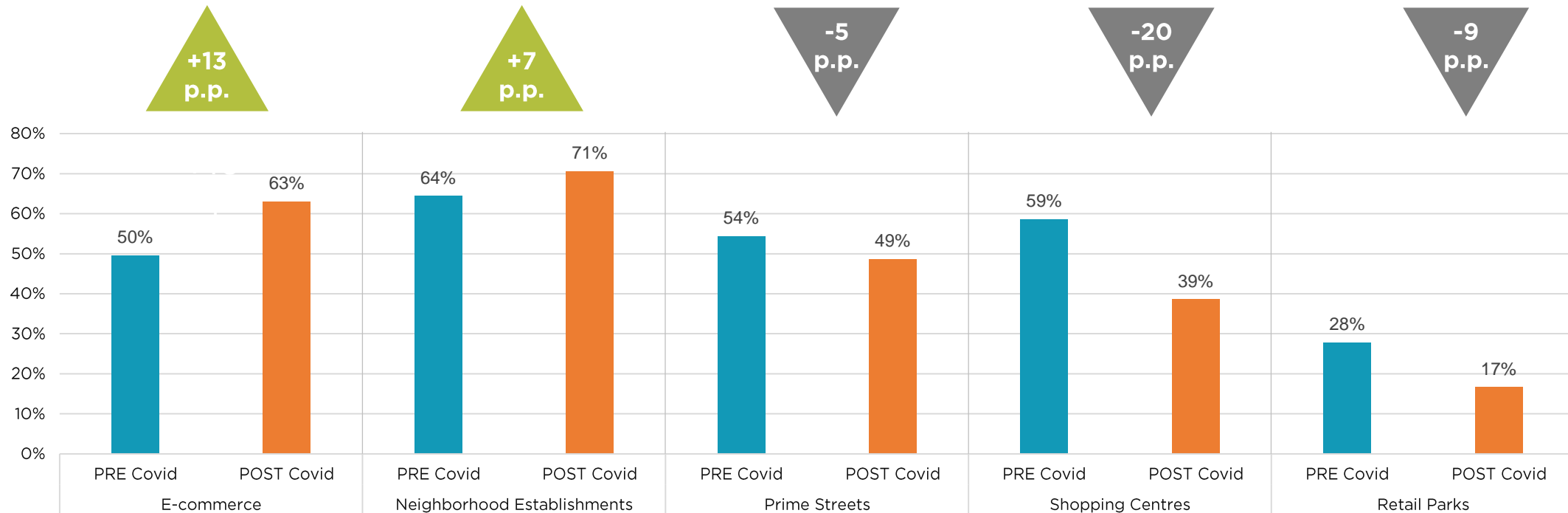
Comparing the frequency of visits prior to and post-Covid-19, high-frequency shoppers (those who go shopping between once per week and once per month) can be grouped into:

Those seeing an increase in visits:

- To neighbourhood shops. These hope to see greater footfall over the coming months during to the more local option offered
- E-commerce will gain strength in the new normal

Those seeing a fall in market share:

- Premises located on the main retail thoroughfares will see a drop in visits of 5 percentage points
- Shopping Centres expect to suffer a reduction in footfall of some 20 percentage points
- Retail Parks will also experience a slide in footfall, of some 9 percentage points



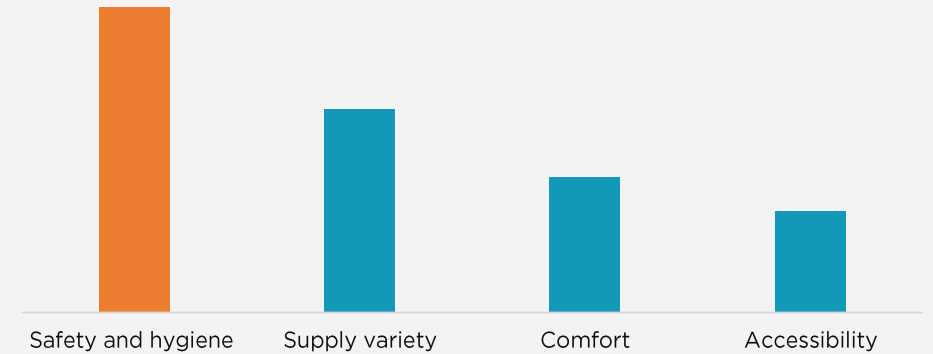
Return to retail premises

Safety and hygiene have become the key elements for consumers in terms of returning to retail premises.

- Safety and hygiene are important or very important for 87% of respondents.

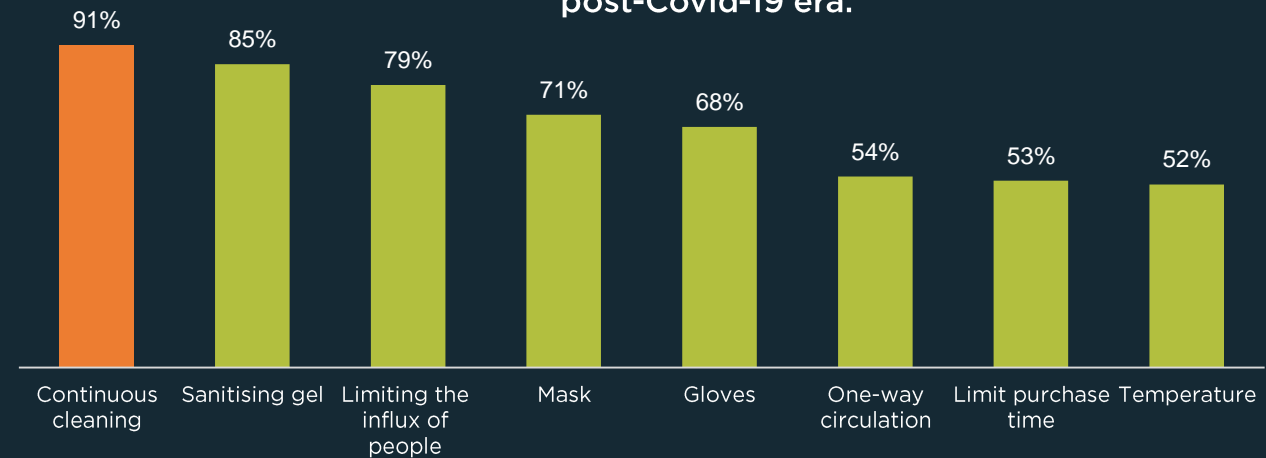
- 91% state that continuous cleaning is important or very important.
- The availability of sanitising gel and limiting the influx of people are important or very important for 85% and 79% respectively.
- Measures such as the Cushman & Wakefield [6 Feet Model](#) ensure the highest levels of consumer safety when shopping in high street premises, shopping centres and retail parks.

The most important items when shopping



Source: Cushman & Wakefield

Safety measures sought by customers in the post-Covid-19 era.



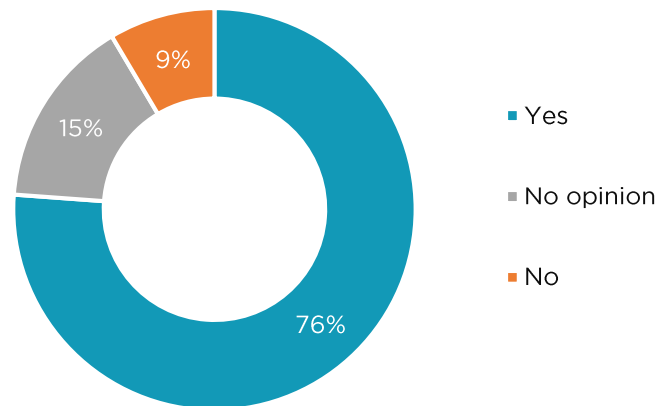
Source: Cushman & Wakefield

Online shopping under lockdown

E-commerce as an alternative to purchases in physical stores

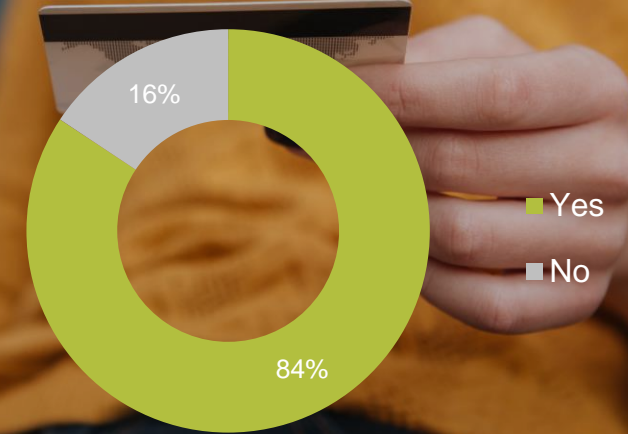
- During lockdown, some **84%** of respondents made online purchases.
- The majority of e-commerce spending was focused on food and cleaning products.
- In terms of the level of satisfaction with the online experience and speed of delivery, some **76%** give positive feedback.

Satisfaction with the online shopping experience and speed of delivery



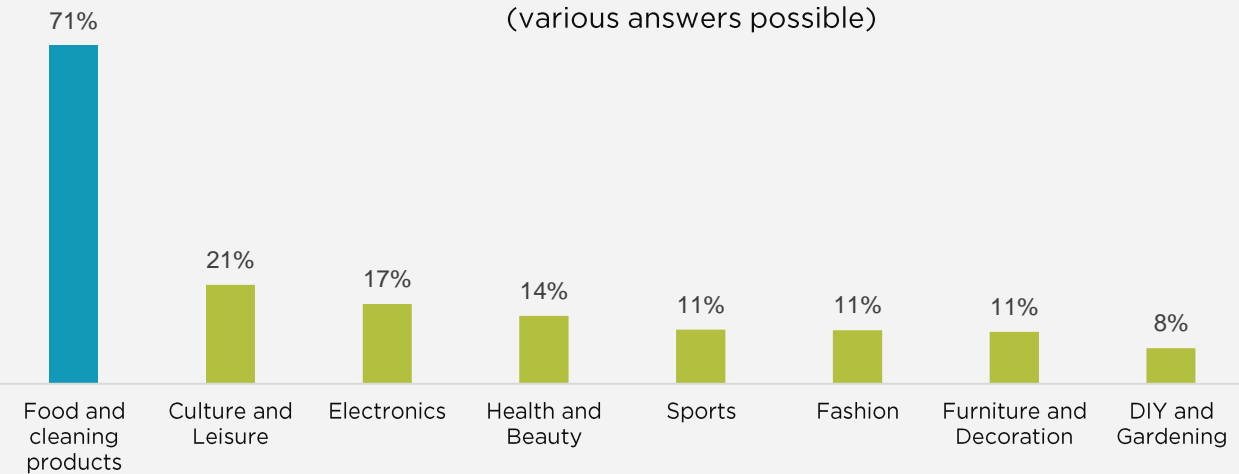
Source: Cushman & Wakefield

Shoppers who have made online purchases during lockdown



Source: Cushman & Wakefield

Share of online spending (various answers possible)



Source: Cushman & Wakefield

Online shopping post-Covid-19

66%

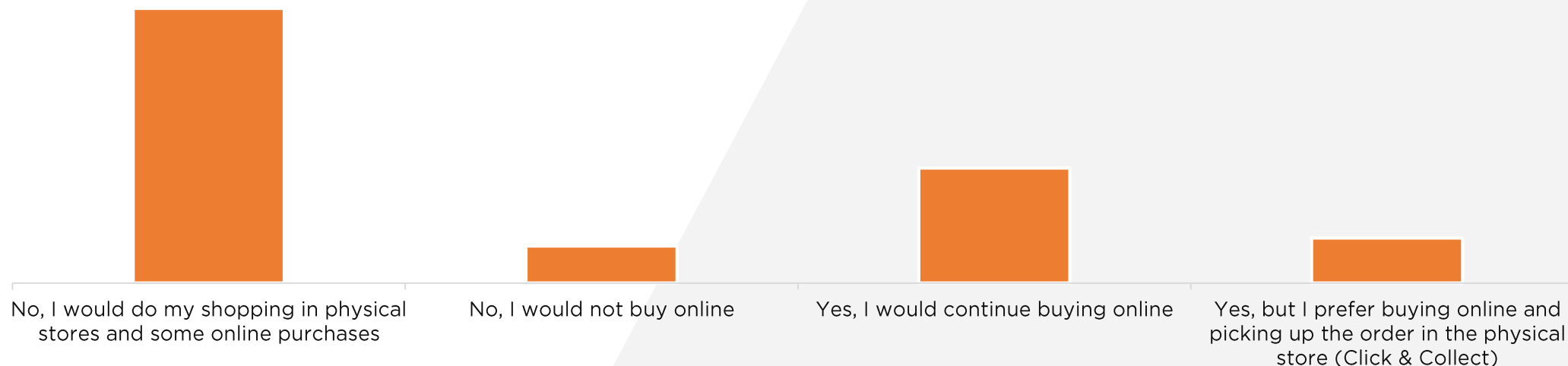
of consumers wish to return to retail premises at the end of lockdown.

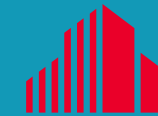
Shoppers using exclusively physical stores have the lowest share and are mainly (75%) 45 years of age or older.

Omni-channel

Purchases that were mainly online (24%) and with the Click & Collect option (10%) reveal that the new retail model points towards the joint use of physical and online channels.

Will we continue shopping online following lockdown?





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