Changing Face of the High Street - UK - 2021

Report Price: £2195 | $2995 | €2600

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This report looks at the following areas:

- **The impact of COVID-19 on shopping behaviour both in-store and online.**
- **Shifts in consumers' spending on goods and services across the past two decades, and how this has altered the retail sector.**
- **The growth of penetration of online in the retail sector and the impact of this on physical sales.**
- **What the important factors are for a physical shopping destination to have.**
- **How consumers feel about physical customer service and services on offer in physical stores.**
- **Attitudes towards online shopping post-pandemic and what can encourage greater in-store shopping.**
- **How consumers shop multichannel and what retailers can target to better connect the channels.**
- **Key drivers of current consumer behaviour and how these trends will manifest themselves in innovation across the next decade.**

In 2010, 15.8% of all non-food sales in the UK are estimated to have come from online-only and other non-store retailers (eg catalogue sellers, TV shopping etc). In 2020 this number had jumped to 48.6%. While accelerated by the pandemic, it stood at 33.9% in 2019; this remarkable rise of online-only retailers and greater engagement from store-based players in the online channel serves to highlight the current pressure on physical stores.

The COVID-19 pandemic has naturally accelerated many key trends in the market, with online purchasing growing and becoming more frequent and footfall falling significantly. Following the removal of all restrictions in July 2021, footfall has recovered a little, although at 58.7% stores are still claiming a smaller share of total non-food sales than they had previously.

Greater online use is naturally a major threat to shopping locations, but equally threatening is that store-based shopping has become more 'planned', with 74%

"In-store shopping was under pressure prior to COVID-19 and the pandemic has only served to intensify this. The loss of multiple high street staples will leave deep scars and heightened online use will, understandably, make more retailers reticent to take on additional space."
– Nick Carroll, Associate Director of Grocery and E-commerce Research

of consumers saying their trips to stores have become more planned since the COVID-19 outbreak began and 71% saying they only visit stores when they have to. This more planned and 'get in, get out' behaviour, if it remains, has the potential to reduce dwell times in shopping locations, integral to driving impulse browsing and purchasing.

Much of what has occurred during the pandemic can be seen as a negative for physical locations. The majority (60%) of consumers say they have missed going shopping as part of a day out and 55% say going shopping is a great way to socialise. There is still much stock placed in physical shopping, and the absence of this through much of 2020 has the potential to now be used as a catalyst to reinvigorate physical shopping behaviours moving forward. However, to do this investment is needed, not only to fill gaps left by business failures during the pandemic, but also at store level, from customer service to in-store services, to create a mix and experience which rewards that desire to support physical stores.

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