BIG RED ROOSTER
a JLL company
X ENGINE

Craving Control

Why the brick-and-mortar environment is our best opportunity to give consumers the control they desire

The past year has exposed the weaknesses of physical retail

In the context of psychology, "control" generally refers to how a person regulates themselves or **wishes to regulate their environment.**

The past year has been stressful, in part, because it stripped us of this autonomy. It left us feeling powerless over our social lives, our work lives, and our ability to shop and dine out safely. But it also gave us the **chance to discover where we can take back our autonomy — and it exposed brands to the four levers they can pull to provide it.**

Though it still has a long way to go, the brick-and-mortar environment remains not only a critical touchpoint in a brand's marketing mix, but **the best opportunity to give consumers the sense of control they desire.**

The brick-and-mortar environment is one touchpoint that can offer all four levers of consumer control

Calm

Confidence

Clarity

Choice

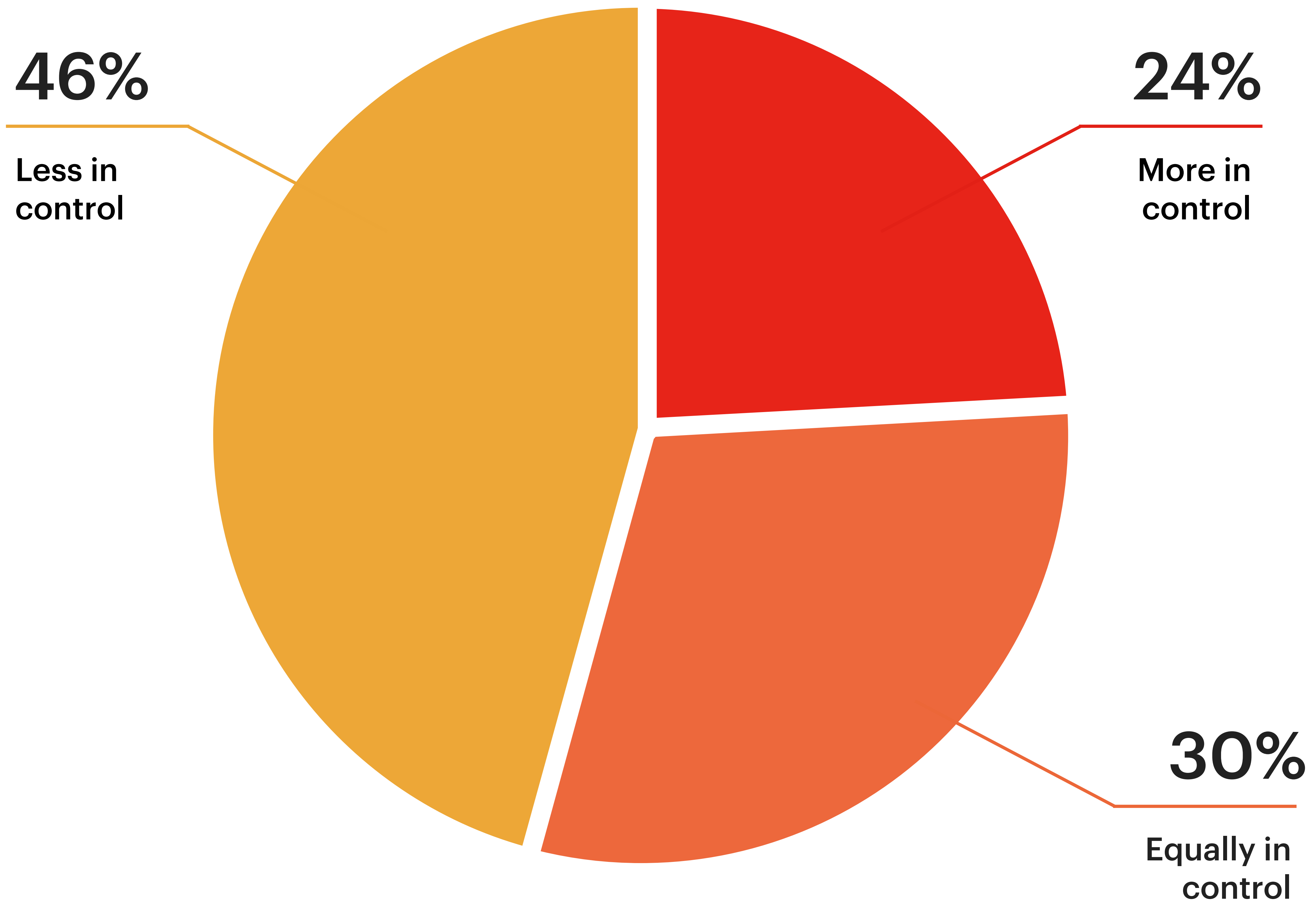
Calm

Reducing anxiety in the experience, from beginning to end, can drive **repeat visits and increase dwell time**

Compared to before COVID-19, **half of consumers feel less in control** of not only their shopping experiences but their personal lives

Among the generations, Gen Z is most likely to feel more in control now compared to before the pandemic, while Baby Boomers are most likely to feel equally in control — **signaling that the seismic shift in what's "normal" has had its strongest impact on Gen Z.**

'Compared to life before COVID, today I feel...'



Please complete the following statement: 'Compared to life before COVID, today I feel...'
Select one answer.

Feeling a sense of control is important in ALL aspects of consumers' lives

Living

Personal/social life

62%

65% of women vs. 58% of men

Work life

46%

61% of Millennials vs. 29% of Boomers

Shopping

In-person shopping

59%

67% of Boomers vs. 44% of Gen Z

Online shopping

57%

60% of women vs. 53% of men

Dining

In-person dining

49%

53% of Gen X, Boomers vs. 37% of Gen Z

Pick-up/delivery

45%

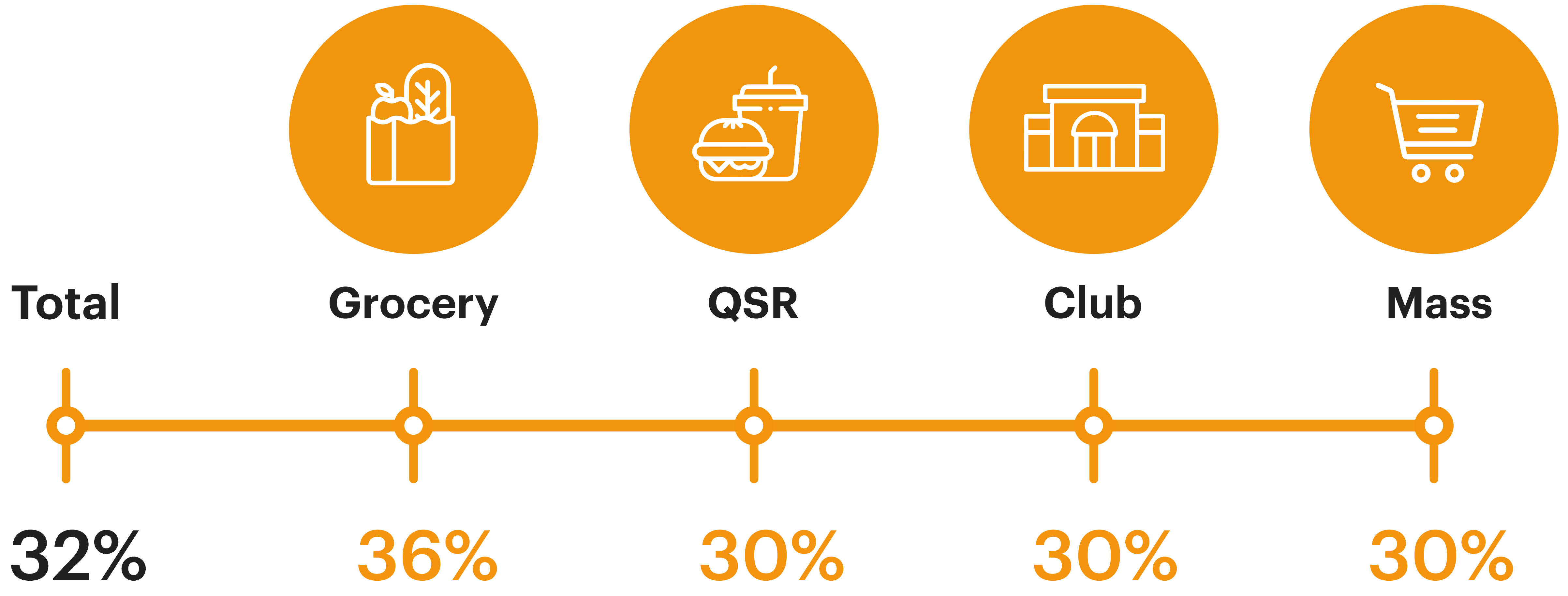
49% of women vs. 40% of men

On a scale of 1 to 10, how important is it for you to have control over each of the following?
Percentages reflect Top 3 Box (8, 9, or 10).

A lack of control caused one-third of consumers to feel some amount of anxiety on their last trip to a store/restaurant

"I felt anxiety at times during the experience, from beginning to end"

Women report feeling less anxious than men in their shopping, with only 29% feeling anxiety on their last trip compared to 35% of men



Thinking about how you felt during your shopping experience, which of the following statements best describes your last visit to the following store(s)? 'I felt calm during the experience, from beginning to end', 'I felt some anxiety at times during the experience, 'I felt anxious during the experience, from beginning to end'

The **human component** of the store/restaurant remains a source of comfort in physical retail commerce — **and a key trip driver**

Men are more likely to visit a store for the human element, with 59% selecting this driver compared to 51% of women

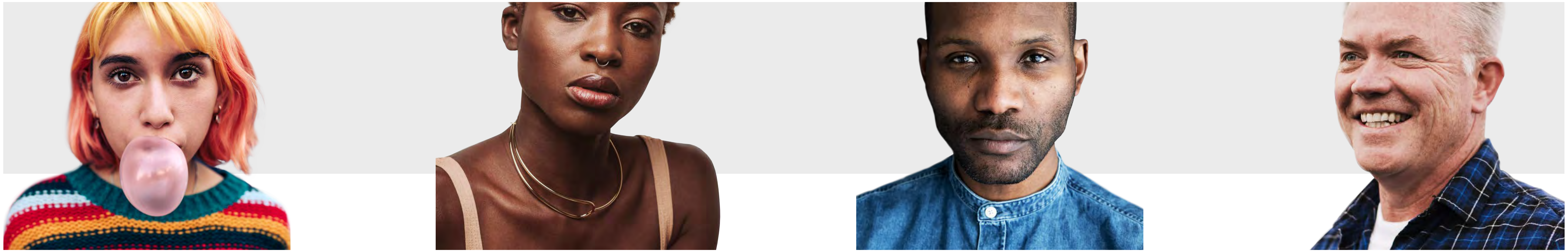
say they go to brick-and-mortar stores to connect with, ask questions, or **get help from store/ restaurant employees in person**

"A nice-to-have aspect of the experience for me is pleasant store associates who are always available to help me when I need it."

Female, Gen X

Think specifically about the trips you make to physical stores and restaurants. To what extent do you agree or disagree with the following statement? 'I want to connect with, ask questions, or get help from store/restaurant employees in person'

Age and life stage could be driving significant differences in consumers' desire for control



	Gen Z	Millennials	Gen X	Boomers
Desire for control over **in-person shopping**	44%	54%	61%	67%
Desire for control over **in-person dining**	37%	46%	53%	53%

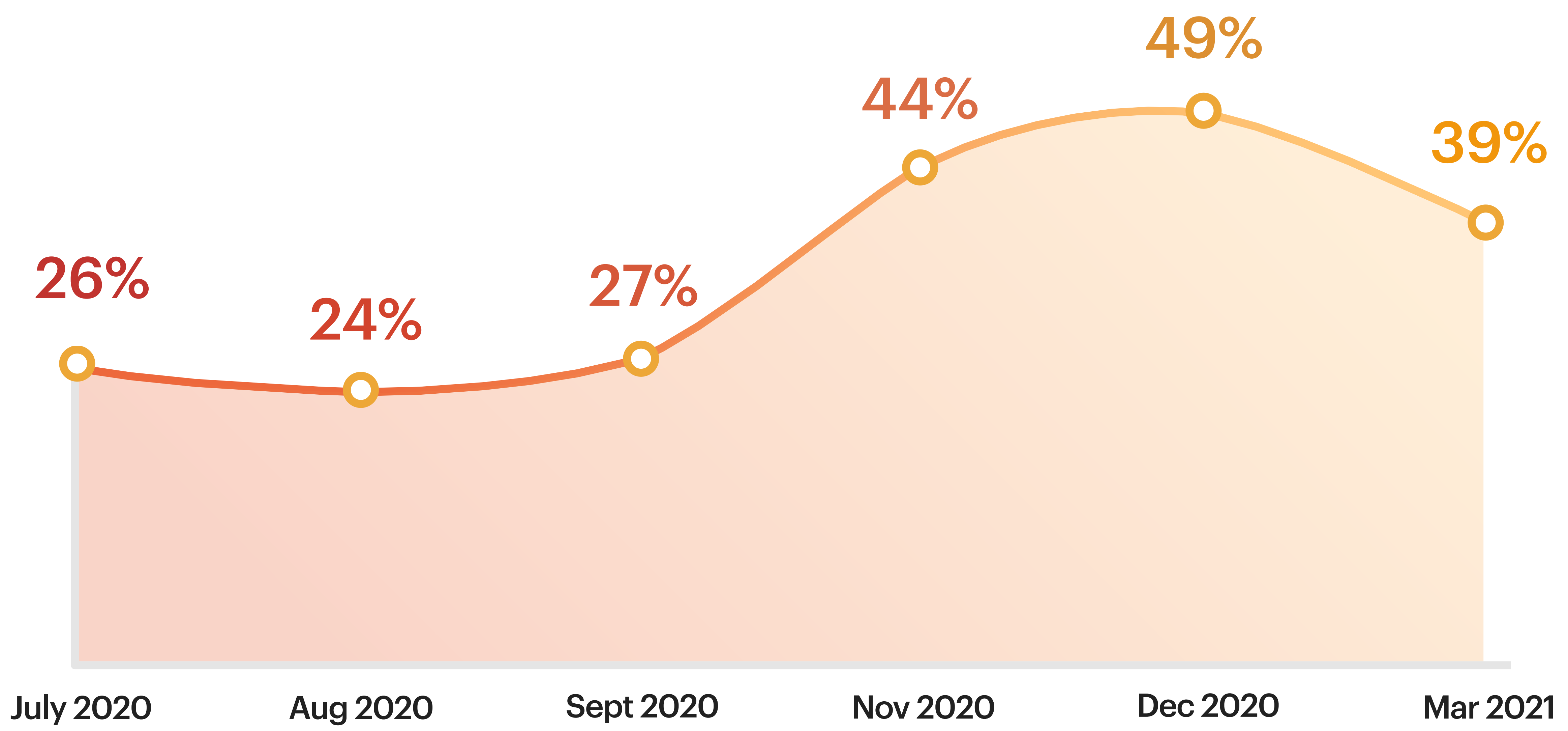
Confidence & Clarity

Setting expectations & providing transparency at each step of the journey can **help build trust & confidence**

Consumers feel a continued **sense of powerlessness over their own well-being** when shopping

Despite the rollout of a vaccine for COVID-19, the percentage of consumers who strongly agree they **felt safe on their last shopping trip is down to only 39%.** This is a decrease from 49% in December and 44% in November 2020.

"I felt safe while shopping in-store"



Gen X are the most likely to strongly agree they felt safe

(46% vs. 34% of Boomers, 37% of Millennials, 42% of Gen Z)

Thinking about your last shopping trip outside of your home, how much do you agree or disagree with the following statement? 'I felt safe while shopping in-store.'

Only two-thirds felt fully confident in the safety and service standards on their last trip

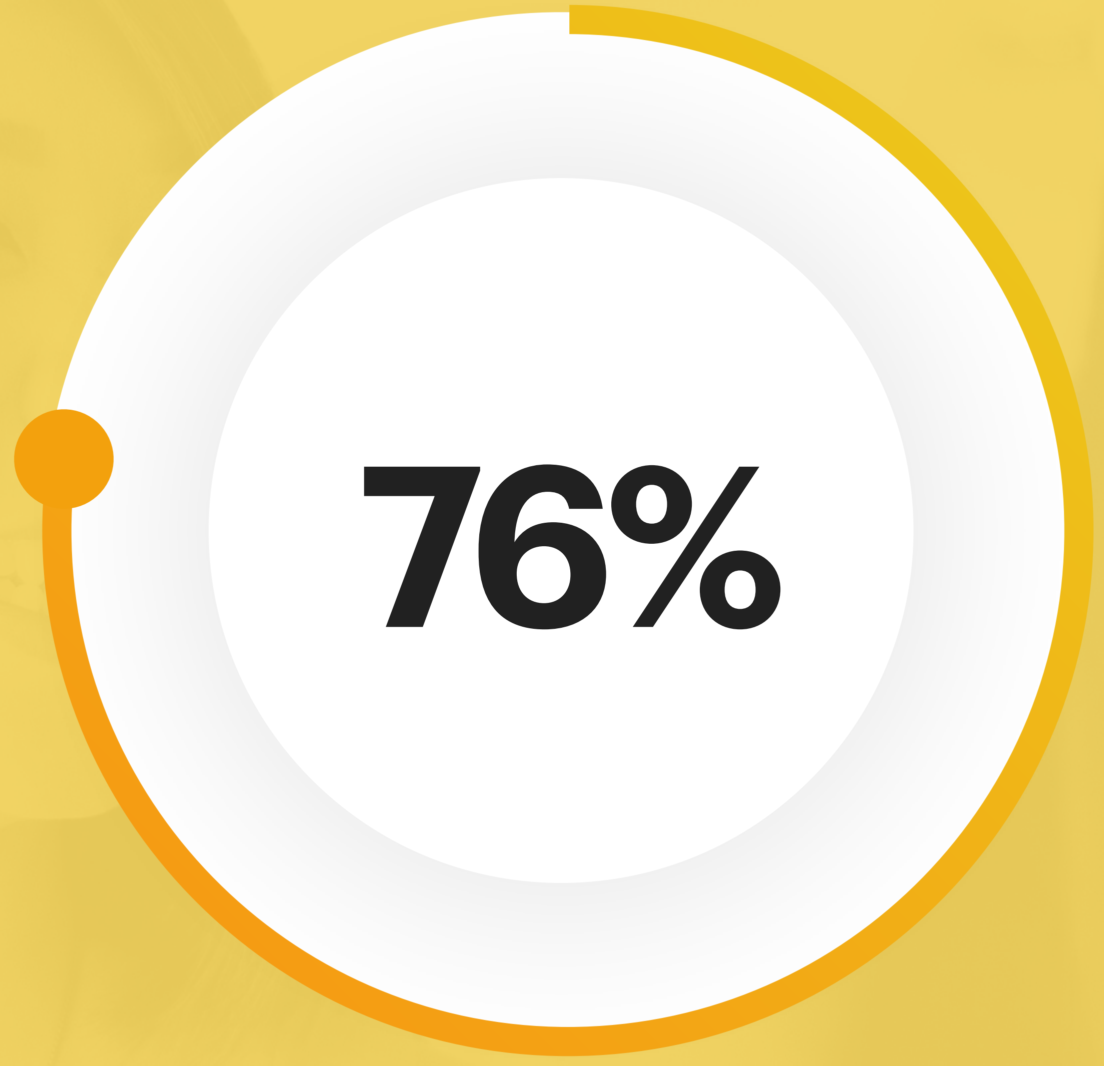
"I felt fully confident in the safety and service standards"

A generation that is particularly security-driven, Gen Z is least likely to have felt fully confident (only 49% vs. 59% of Millennials, 64% of Gen X, and 72% of Boomers)

Total	QSR	Club	Mass	Grocery
63%	65%	64%	62%	62%

Thinking about the store's cleanliness procedures and your overall service experience, which of the following statements best describes your last visit to the following store(s)? 'I did not feel confident in the cleanliness and service procedures', 'I felt somewhat confident in the cleanliness and service procedures, 'I felt fully confident in the cleanliness and service procedures'

But, despite disruptive innovation around fulfillment, the **#1 reason consumers choose to go to stores is because they are familiar/expected**



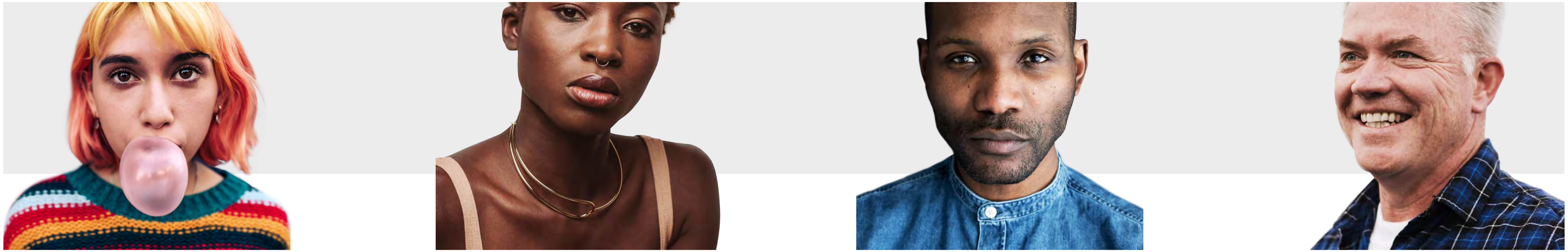
say they go to brick-and-mortar stores or restaurants because **they know exactly what to expect from the experience**

"I like having the ability to choose whether I purchase products online or in-person. But I choose to go to the store because I know there will be a vast selection of easy-to-find / locate items presented in an attractive way."

Female, Millennial

Think specifically about the trips you make to physical stores and restaurants. To what extent do you agree or disagree with the following statement? 'I know exactly what to expect when I go to a physical store or restaurant'

Providing more clarity & confidence to Gen Z can drive more trips to brick-and-mortar retail

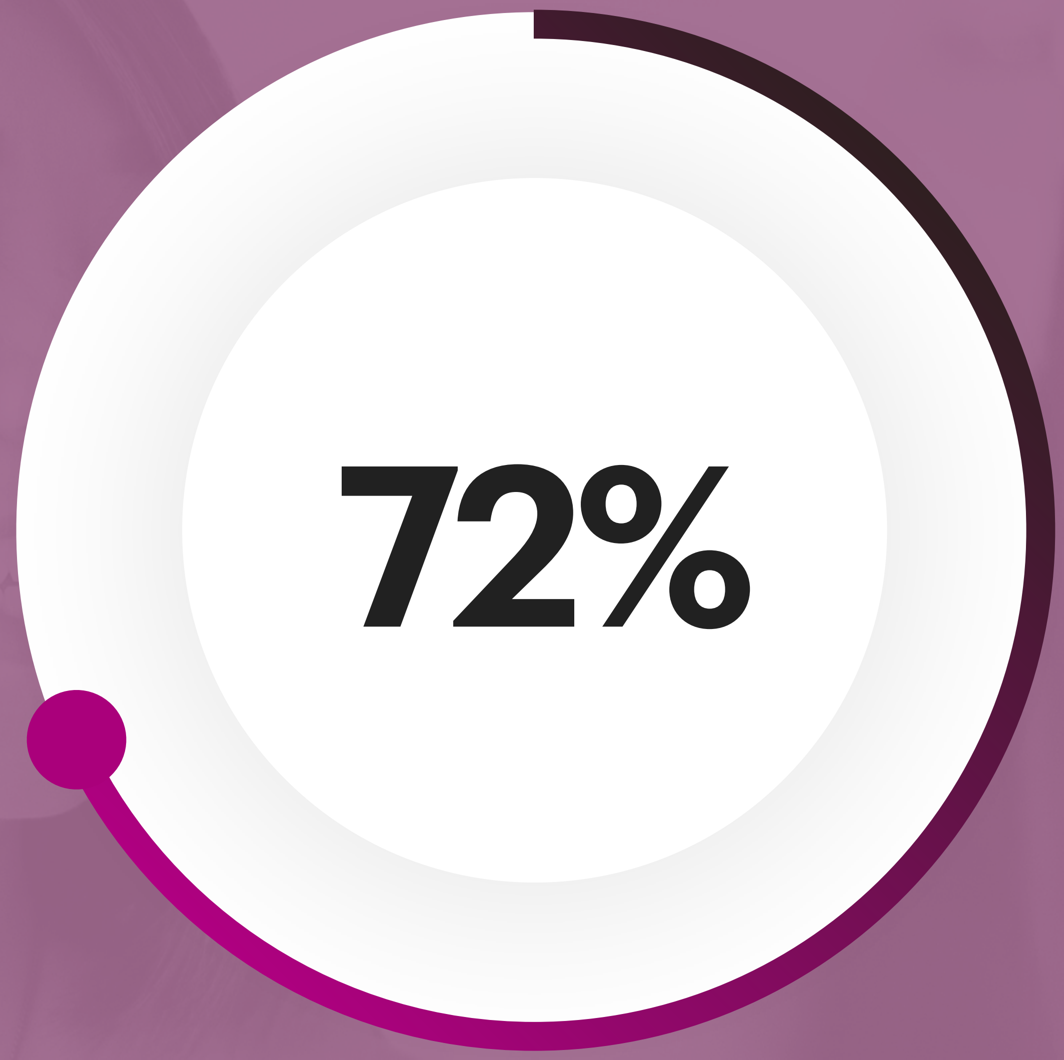


	Gen Z	Millennials	Gen X	Boomers
Go to physical stores/ restaurants because they **know what to expect**	59%	77%	81%	78%
Felt clear about what to expect on their last trip	55%	57%	73%	80%
Felt confident about their safety on their last trip	49%	61%	77%	88%

Choice

Empowering consumers to choose exactly how they interact with brands, on multiple fronts, **can increase satisfaction**

Consumers cherish the **enjoyment that comes with seeing/feeling products in person** before making a purchase



say they go to brick-and-mortar stores or restaurants because they want the **enjoyment of picking out products in person**

"I like to personally choose what I want by feeling it first instead of ordering it online. As long as I also feel safe and assured that the store and other customers are practicing guidelines related to COVID-19."

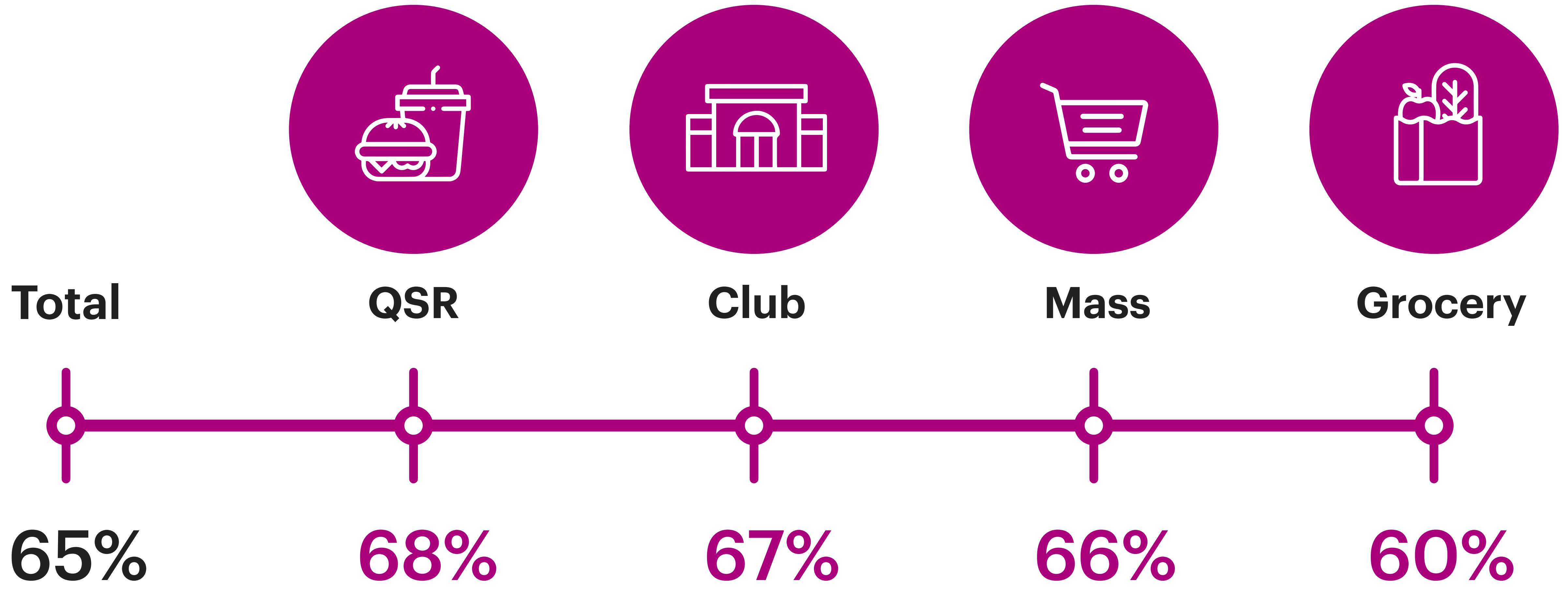
Female, Millennial

Think specifically about the trips you make to physical stores and restaurants. To what extent do you agree or disagree with the following statement? ' I want the enjoyment of being in the store/restaurant and ordering or picking out my product in person'

A perceived limitation around choice is ubiquitous across retail sectors

"I was able to make the exact choices I wanted, to the full extent desired"

Boomers and Gen X feel the least limited in their choices, with 75% and 68% able to make the exact choices they wanted on their last trip — compared to only 54% of Millennials and 56% of Gen Z



Thinking about the store's cleanliness procedures and your overall service experience, which of the following statements best describes your last visit to the following store(s)? 'I was limited in my choices', 'I was able to make some selections but not to the full extent desired, 'I had full control over the experience and chose exactly what I wanted'

Despite current restrictions, in-person shopping gives consumers an immediate gratification that cannot be replicated

74%

say they go to brick-and-mortar stores/restaurants because they want **to get products immediately, without the wait**

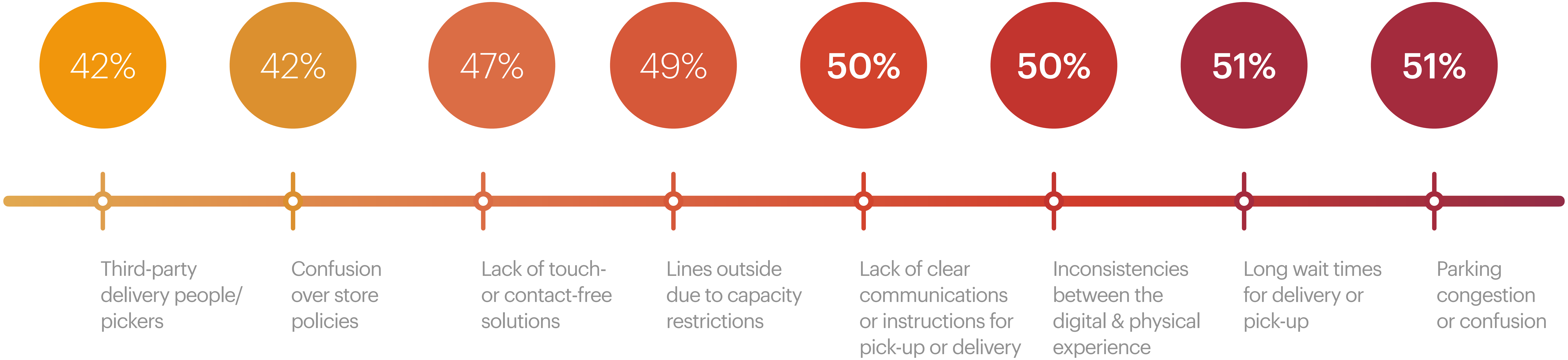
"Items that I want actually being in-stock. Not having to wait during checkout. Being able to browse without feeling in a hurry due to store limitations on the number of shoppers permitted at one time."

Female, Gen X

Think specifically about the trips you make to physical stores and restaurants. To what extent do you agree or disagree with the following statement? 'I want to get my product immediately, without waiting'

Stores and restaurants must solve for anything that interferes with this immediacy

Degree to which the following negatively impacts my shopping experience (A lot or Somewhat)



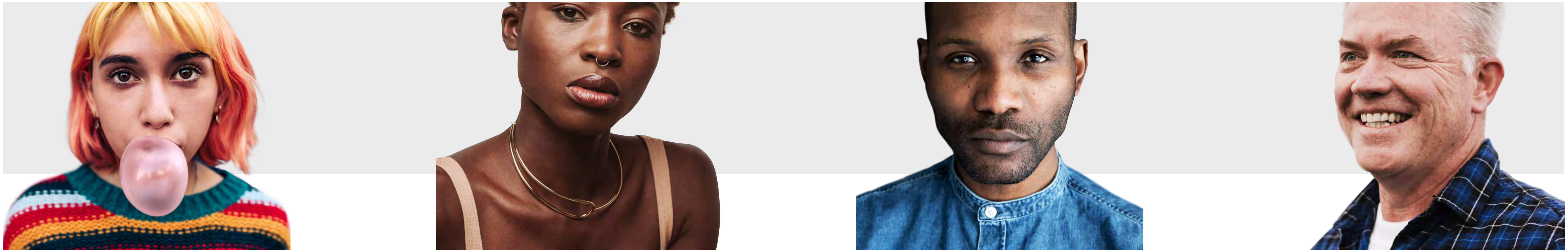
Please indicate the degree to which the following negatively impact your shopping experience. Select one answer for each.
Percentages reflect Top 2 Box (A lot or Somewhat).

Millennials, in particular, are the least patient when it comes to any impediments to speed

'___ negatively impact(s) my experience'	Millennials
• Parking congestion or confusion	66%
• Long wait times for delivery or pick-up	65%
• Lines outside due to capacity restrictions	61%
• Lack of clear communications or instructions	60%
• Third-party delivery people or pickers	56%

Please indicate the degree to which the following negatively impact your shopping experience. Select one answer for each. Percentages reflect Top 2 Box (A lot or Somewhat).

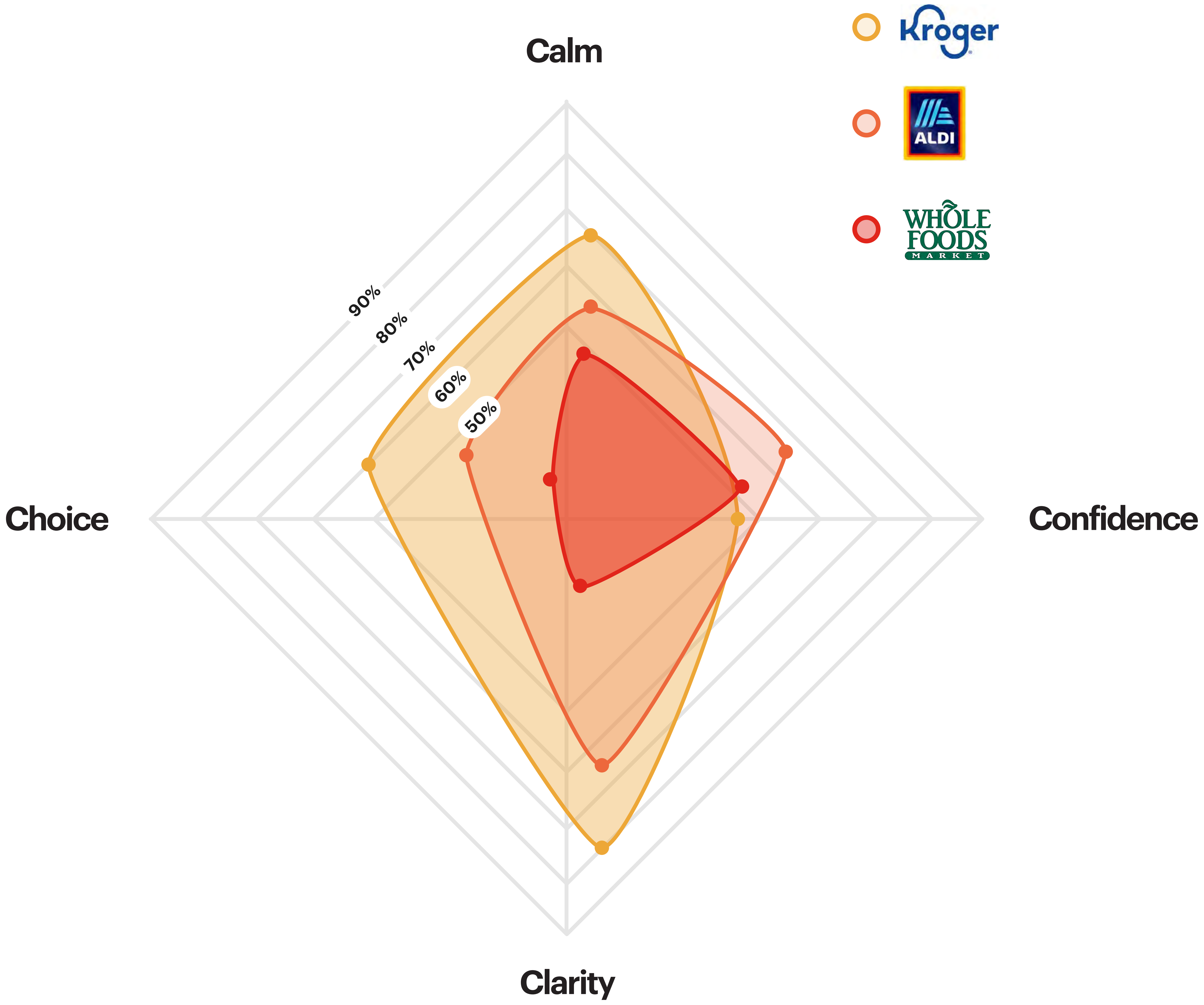
Digital Natives, especially Millennials, feel the most limited in their choices today



	Gen Z	Millennials	Gen X	Boomers
Felt able to make the **exact choices they wanted** on their last trip	56%	46%	60%	75%

Our **Control Diagnostic** revealed some directional differences between brands

In the Grocery sector, for example, **Kroger outperformed both ALDI and Whole Foods** on 3 of the 4 levers of control



Thinking about all the decisions you made during the experience, please select the statement that best describes your experience during your last visit to the following store(s).

“The ultimate control, for me, would be…**being able to shop whenever, wherever, or however I want and knowing it will go as planned.** This gives me a feeling of freedom and flexibility in my shopping.”

Male, Gen X

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Big ideas. Realized.

What We Do

Big Red Rooster is a multi-dimensional brand experience firm. From the workplace to the marketplace, we create transformative human experiences that accelerate business growth. We believe real estate is one of the most powerful components of your brand's marketing mix. It has the potential to have a transformational impact on people — reinforcing your mission, values, and culture — and on your bottom line. We activate brands across immersive environments, interactive experiences, and integrated communications. By using the power of human insights and design-thinking, we are able to realize your brand's growth potential.

Strategy Consulting

Research & Insights
CX Innovation
Retail Strategy
Corporate Culture
Experience Strategy

Experience Design

Workplace Design
Retail Design
Retail Planning
Visual Merchandising
Human Interaction Design

Brand Marketing

Brand Development
Strategic Planning
Activation & Awareness
Integrated Communications
Digital Experiences

Design Management

Architectural Services
Prototype Development
Multi-unit Rollout
Experience Guidelines
Project Management Services

2019
Design Firm of the Year
by design:retail

What Makes Us Different

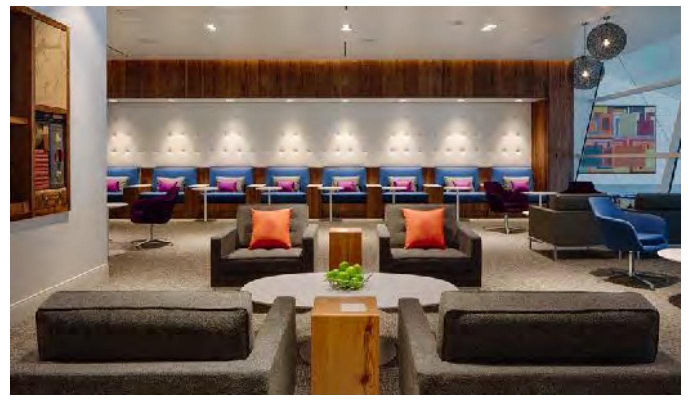
We have carefully built an interdisciplinary team of experts that continues to prove that by thinking and acting differently we deliver significant value and growth to our clients' businesses.

- Strategically-led, consumer-focused design that solves business challenges and capitalizes on new business opportunities
- Dynamic collaboration among our clients, experienced senior leadership, and our cross-functional teams
- Expertise across retail, service, and corporate channels
- Customized approach to every initiative

What we have done for our clients.

Firehouse Subs
Restaurant Design

Champion
Retail Activation



AMEX
Brand Experience Design

Our clients.

Champion
ALDI
KOCH
American Express
Krispy Kreme Doughnuts
The Home Depot
Chick-fil-A
National Geographic
Freddie Mac We make home possible

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Re:Mix

About this study

Big Red Rooster has kicked off 2021 with a thought leadership series aimed at understanding how consumer behaviors and expectations have evolved, especially as they relate to the role of real estate in the context of brand. Our Q1 study was conducted in partnership with ENGINE Insights the week of March 22, 2021 and included a 1-day Digital Hive with 100 consumers, followed by a CARAVAN® survey with 1,000 demographically representative U.S. adults ages 18 and older.

Follow along all year:

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Contact us for more

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