
SHOPPING CONFESSIONS

How women's shopping behaviors,
desires and expectations have shifted
and accelerated during the pandemic



In partnership with **The Harris Poll**,
Meredith presents their third annual
exclusive national study on U.S.
women, focusing on emerging trends
around shopping

 **meredith** +  **The Harris Poll**
Harris Insights & Analytics LLC, A Stagwell Company





METHODOLOGY

This survey was conducted online within the United States by The Harris Poll on behalf of Meredith from July 30-August 11, 2021, among 2,623 women.

We also conducted qualitative diaries and interviews with 21 women who varied in race, age and sexual orientation.

Our survey audience included **Black** (n=326), **Latina** (n=381), **AAPI** (n=213), **1st/2nd Gen American** (n=1,218) and **LGBTQIA** women (n=386).

The generational breakdown was as follows: **Gen Z** (n=771), **Millennial** (n=810), **Gen X** (n=517) and **Boomer** (n=525). In this report “women ≤40” or “women 40 and under” refers to Gen Z and Millennials combined (n=1,581), and “women 40+” or “women above 40” refers to Gen X and Boomers combined (n=1,042).

For more information on the data, contact: Britta Cleveland, SVP, Research Solutions at britta.cleveland@meredith.com

THE GREAT REWIRE: WOMEN ARE CURATING THEIR LIFESTYLES COMING OUT OF A MOMENT OF PAUSE

The pandemic has created space for women to reprioritize their energy and resources. Gen Z and Millennials are driving this trend by re-evaluating everyday habits like beauty routines and closet organization, while also undertaking deeper evolution around mental health and resetting life goals.

When it comes to their wardrobes, women are also re-evaluating trade-offs between comfort and style. They don't want to be restricted anymore by clothing, instead opting for clothing that matches their more flexible and fluid lifestyle. Many imagine leaving their bras and heels in the pre-pandemic era, instead favoring comfortable athleisure and sweats as we move forward. In fact, nearly half of women 40 and under say, “I don't ever want to wear ‘hard clothes’ again” – meaning restrictive clothes like bras and pants (48%).

As women get more intentional about curating their lives, shopping has, in many ways, served as a lifeline. Women across generations shared with us how various forms of retail therapy helped them meet needs for comfort, aspiration and escape. From binging online retailers' sites to keeping secret splurges from others, women are united in many of their “shopping confessions.”

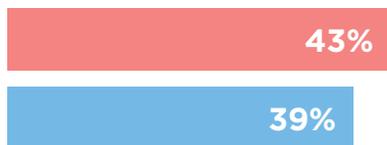
WOMEN ARE PRUNING THEIR LIFESTYLES, ROUTINES AND WARDROBES TO FOCUS ON WHAT MATTERS

WHICH, IF ANY, OF THE FOLLOWING DID YOU DO DURING THE PANDEMIC?

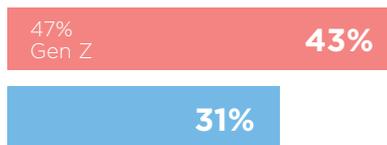
Organized my home or closet



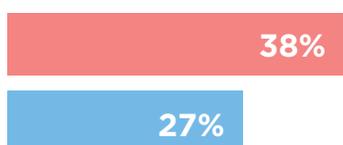
Increased my cooking skills



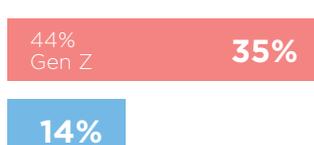
Focused on my mental health/wellness



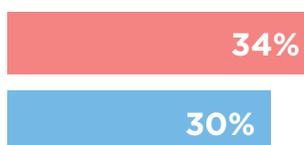
Created new routines that improved my overall well-being



Adopted new beauty, skincare or makeup skills

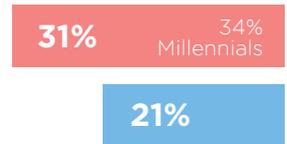


Took charge of my health/fitness

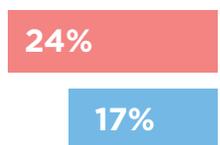


Women ≤ 40 Women 40+

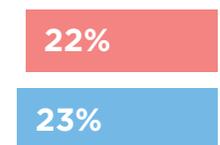
Revisited my life goals/aspirations



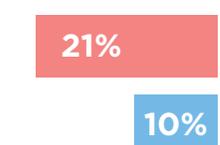
Discovered new brands that I'm planning to stick with post-pandemic



Updated/upgraded inside of my home



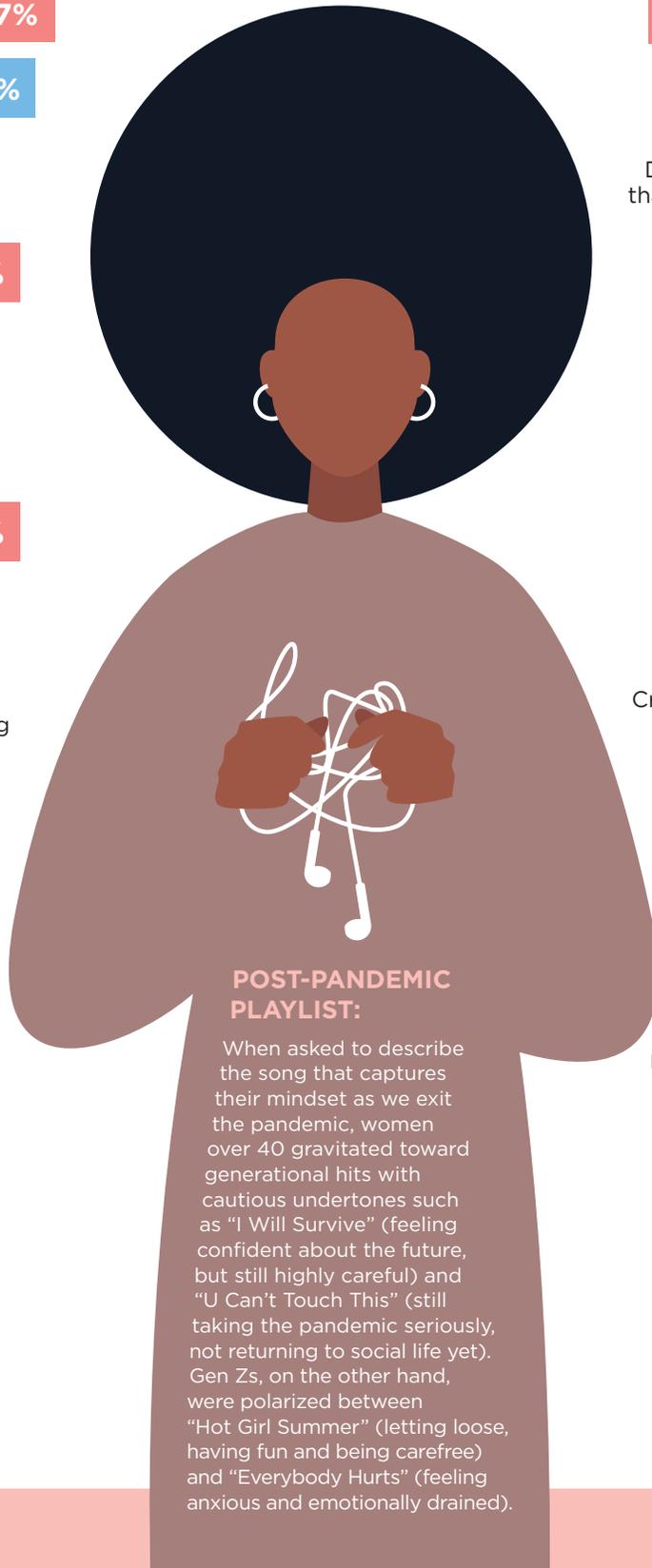
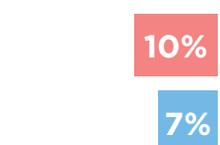
Created new boundaries around work/life



Started investing



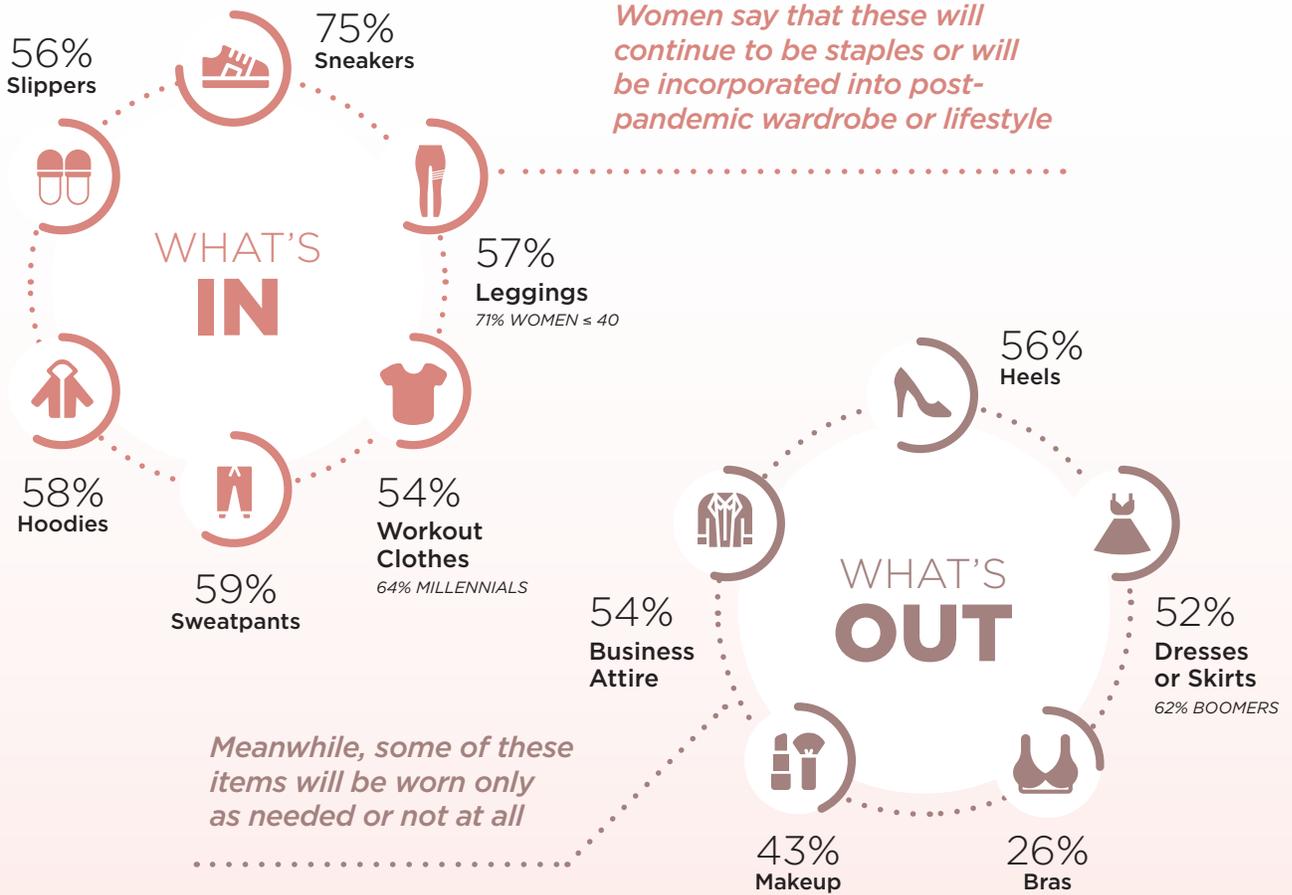
Purchased or planned to buy a property



POST-PANDEMIC PLAYLIST:

When asked to describe the song that captures their mindset as we exit the pandemic, women over 40 gravitated toward generational hits with cautious undertones such as "I Will Survive" (feeling confident about the future, but still highly careful) and "U Can't Touch This" (still taking the pandemic seriously, not returning to social life yet). Gen Zs, on the other hand, were polarized between "Hot Girl Summer" (letting loose, having fun and being carefree) and "Everybody Hurts" (feeling anxious and emotionally drained).

WHAT'S IN vs. WHAT'S OUT



WOMEN'S TOP SHOPPING CONFESSIONS

(% of Women 40 and under who have done or are planning to do)

- 66% Binge on online retailers
- 49% Impulsively donate/give back to causes
- 51% Keep some splurges secret from others
- 48% Upgrade something that doesn't really need upgrading
- 51% Have clothes in my closet with tags still on them
- 44% Set up secondary email accounts to take advantage of promotions
- 50% Waste a fair amount of money buying silly things I don't need to entertain myself
- 40% Overbuy things I know I could return



78% of women admit: "Online shopping is dangerously easy."

JOY-IFICATION AS JUSTIFICATION: SPLURGING IS IN STYLE AS WOMEN LOOK TO TREAT THEMSELVES

Over nine in 10 women (93%) find joy or feel a “high” when shopping. Across generations, deals are the top driver of that shopping high, while the social experience and ability to treat themselves especially appeals to Gen Z and Millennial women. As we exit the pandemic, 83% of women are excited to dress up again. Women 40 and under are particularly likely to lean into the fun side of fashion, saying, “I’m looking forward to embracing ‘joy dressing’ – finding new styles and fun outfits” (71%, vs. 51% women over 40).

“I was able to justify anything that brought me joy during the pandemic, regardless of the price tag.”

57% Women ≤ 40

44% Women 40+

*Half of women 40 and under say they have already spent the money they’ve saved during the pandemic (49%) and that when they overspend, they **punish themselves by excessively cutting spending** (49%).*

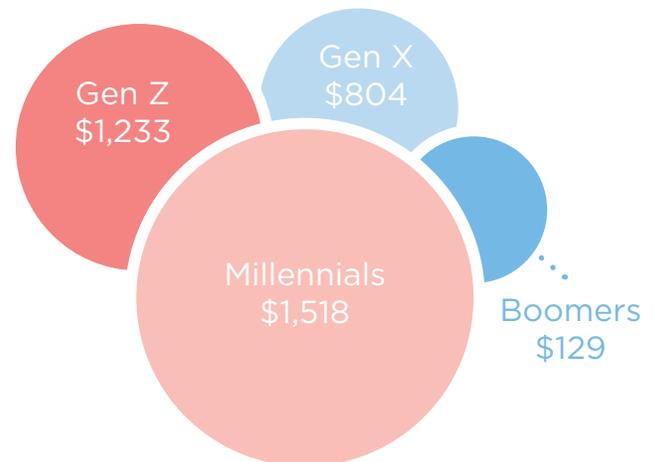
Women are also ready for splurges, as two-thirds agree, “exiting the pandemic, I’m ready to splurge on things and experiences that bring me joy” (63% women 40 and under, vs. 56% over 40). Gen Z and Millennials are also twice as likely as their Gen X and Boomer counterparts to say, “all I want to do is shop to make up for missed time” (44% women 40 and under, vs. 21% women over 40).

Women are not really planning to be picky about where they splurge. As we emerge from the pandemic, majorities expect to maintain or increase:

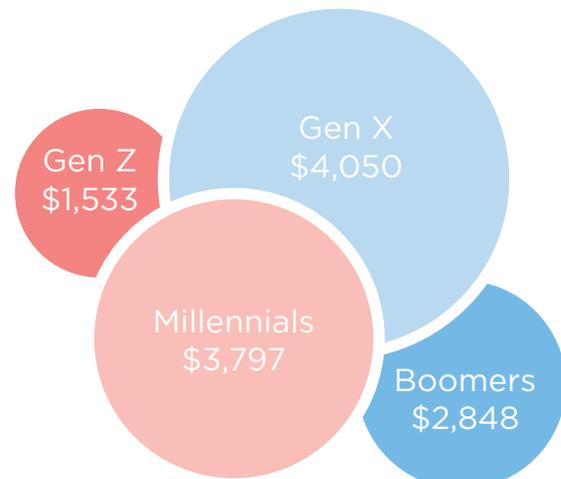
- Shopping online (82%) and shopping in-person (79%)
- Shopping from big retailers (83%) and local businesses (75%)
- Virtual window shopping online (57%) and in-person window shopping at stores (53%)

Our data also revealed two new splurge trends: women 40 and under are investing in their mental health and the stock market. **Mental health is a priority spending area** for this cohort, as they outspend Boomers by 10 times in the category. Gen Zs are most likely to spend on mental health (59%), followed by Millennials (51%), Gen X (40%), and Boomers (19%). **Investing-as-a-splurge is on the rise**, as 38% of women 40 and under say they’ve experienced FFOMO (i.e., Financial Fear Of Missing Out) about cryptocurrency or stocks during the pandemic.

AVERAGE ANNUAL SPEND ON MENTAL HEALTH



AVERAGE ANNUAL SPEND ON ONLINE INVESTING



SHOPPING REIMAGINED:

EXPLORING THE FUTURE OF SHOPPING

81% of women say their shopping habits changed for good during the pandemic. Top shifts include increased comfort with shopping online and appreciation for the in-person shopping experience. Women also report a rising consciousness about supporting small and local businesses, as well as intentionality about shopping choices that align with their values. Women 40 and under are especially likely to express newly formed long-term habits, saying they have shifted their spending to new categories and are more willing to try new brands.

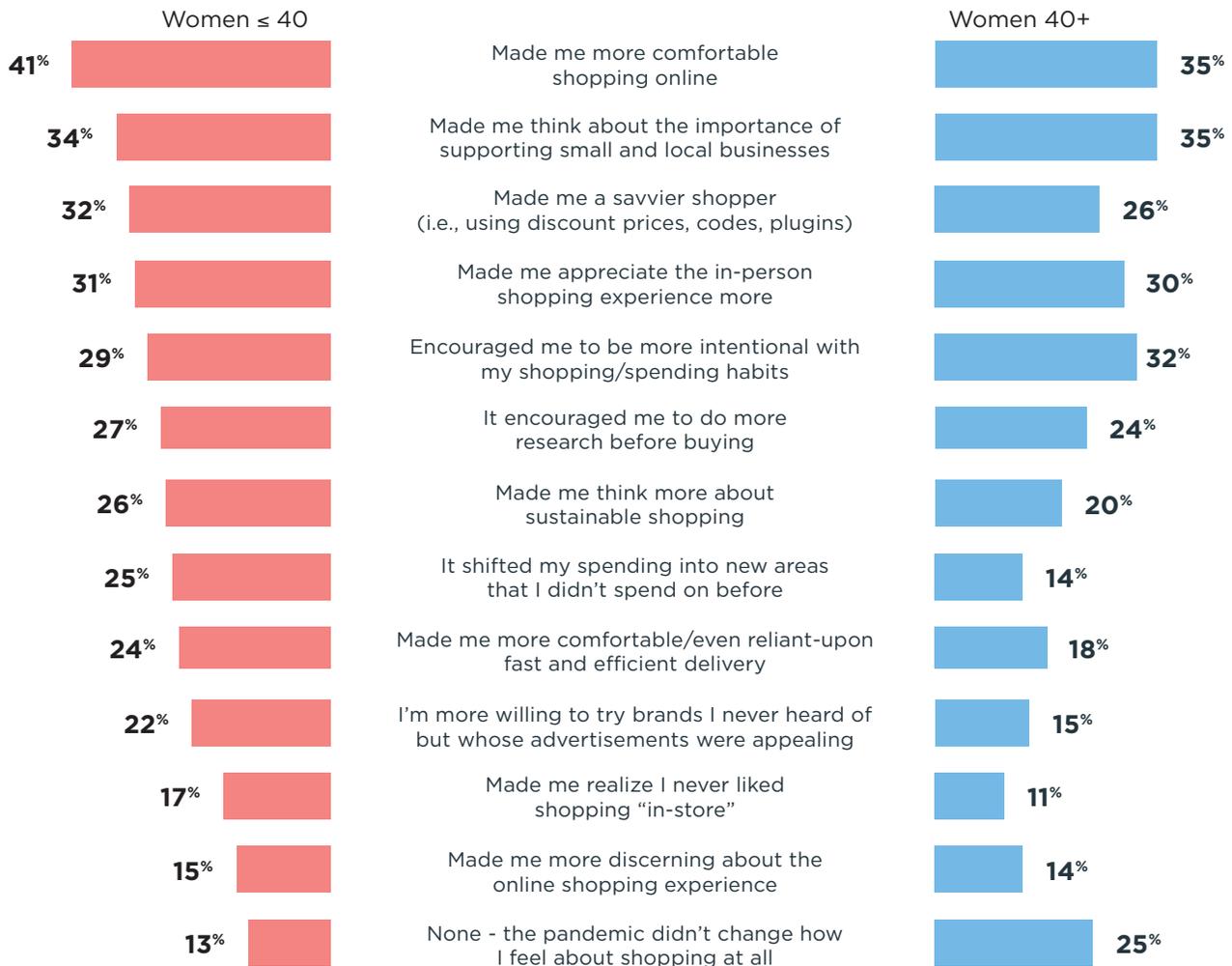
As we look to the future, our data points to three trends shaping how women plan to shop and spend:

1 The future of creating demand starts with digital

2 Raising the bar: In-store retail needs a glow-up

3 The rising tide of guilt-free shopping

HOW DID THE COVID-19 PANDEMIC CHANGE YOUR LONG-TERM (I.E., POST-PANDEMIC) SHOPPING HABITS / OUTLOOK, IF AT ALL?



SHOP 'TIL YOU DROP: UNDERSTANDING SHOPPER'S HIGH

WHAT GIVES YOU A SHOPPING "HIGH" OR EVOKES SHOPPING JOY?



1

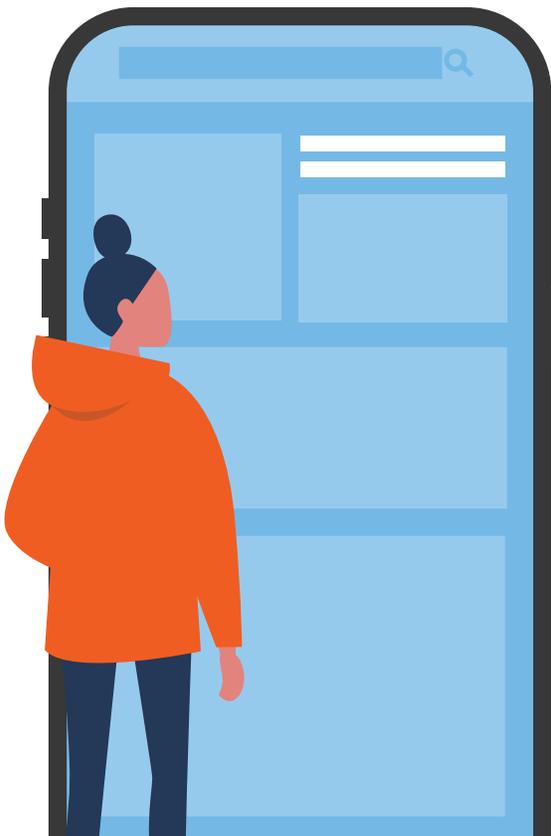
THE FUTURE OF CREATING DEMAND STARTS WITH DIGITAL

Digital daydreaming has come into vogue during the pandemic, especially for women 40 and under. Majorities of Gen Z (65%) and Millennial (63%) women say, “I make wish lists when I see something I like,” while Gen X (51%) and Boomer (65%) women are more likely to agree, “I don’t do wish lists, I either buy an item on the spot or make a mental image in my head.” Gen Z women are especially likely to catch themselves daydreaming on clothing and beauty sites, while Millennials gravitate toward travel and housing sites.

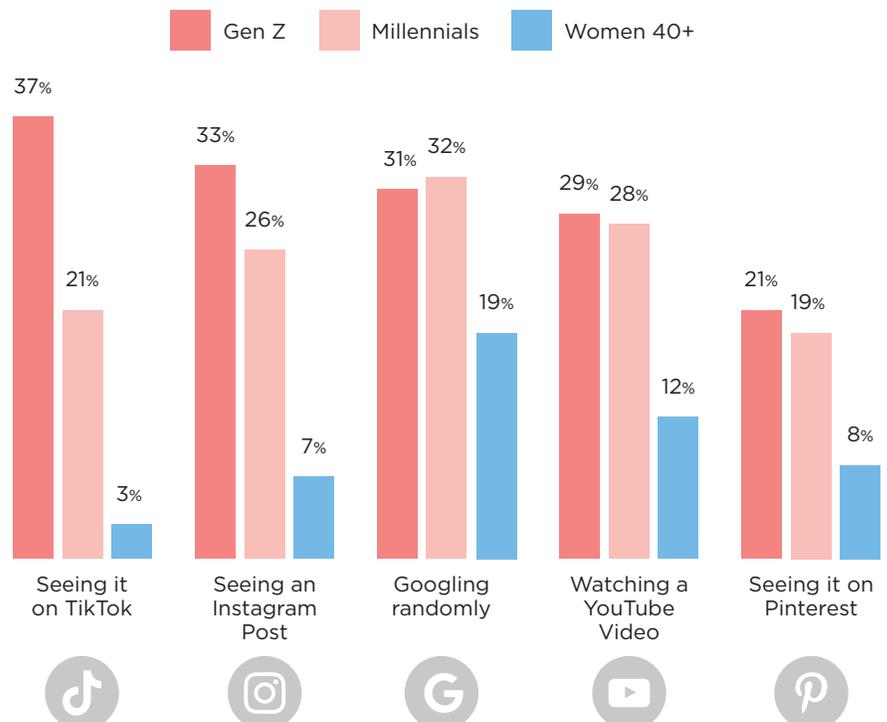
Digital discovery is also becoming optimized as retailers work to bring the serendipity of new finds online. Nearly six in 10 Gen Z women (59%) find out about new products from social media ads, while over four in 10 say they discover new products through influencers and celebrities on social media (44%). Around half say email outreach has driven their purchases (52%), but a similar percentage also admit they are “drowning in junk email from stores / brands that I have purchased from” (56%, 63% women 40 and under). Beyond just #inspo, social media is also driving purchase decisions as many Gen Z and Millennial women have bought

items after seeing them on TikTok, Instagram, YouTube or as a result of an online search.

When it comes to influence, priorities are shifting from size and status toward authenticity and expertise. While larger mega- and macro-influencers have the biggest social media following, micro-influencers have the greatest trust when it comes to their product recommendations. Similarly, celebrities have the biggest social media following among women 40 and under, while editors and subject matter experts are most trusted by that same group.

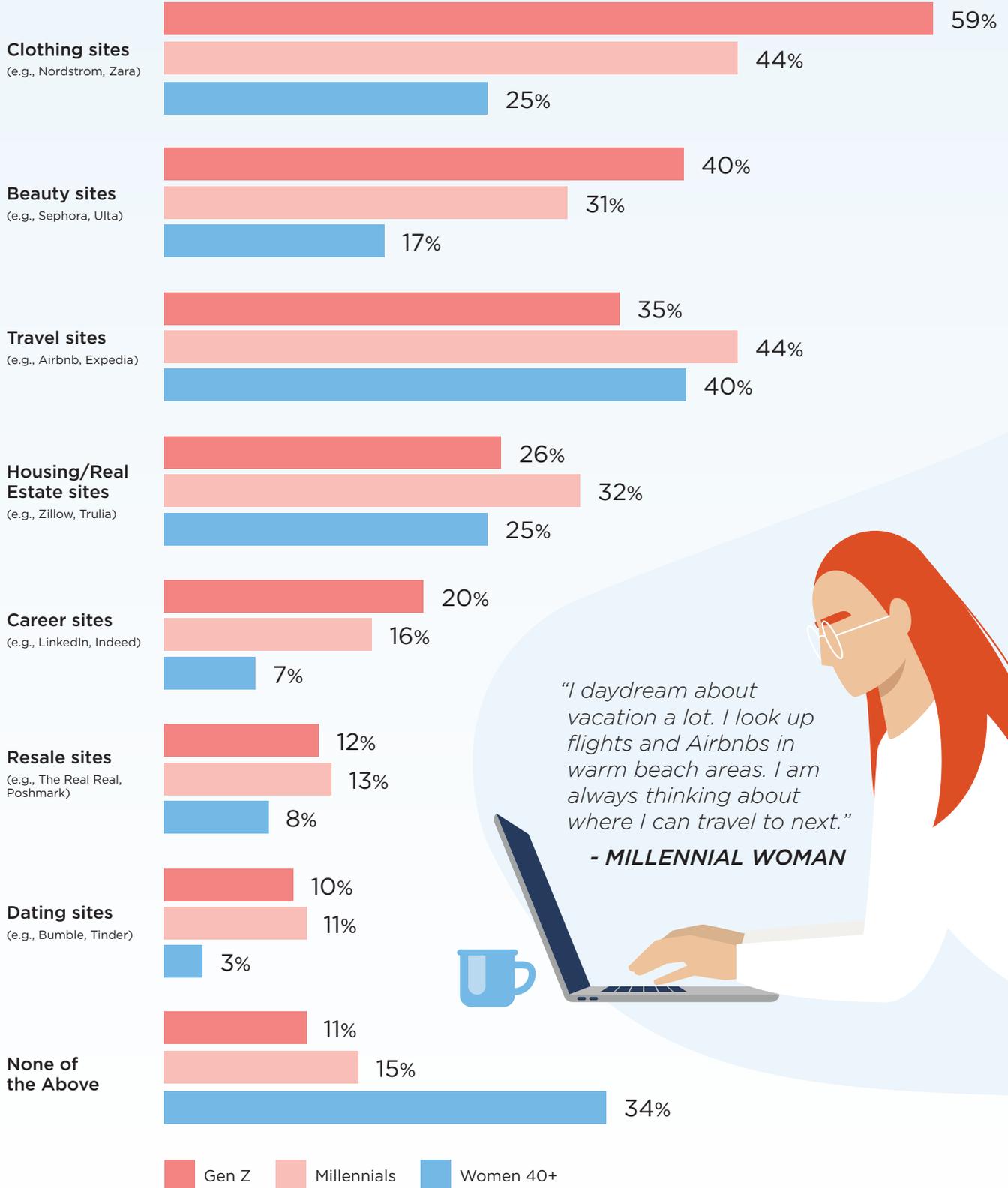


IN THE LAST 12 MONTHS, I’VE BOUGHT SOMETHING AFTER:



DIGITAL DAYDREAMING IS NOW THE TOP OF THE PURCHASE FUNNEL

I'M MOST LIKELY TO CATCH MYSELF DAYDREAMING ON:



32% of Millennials admit to “Zillow dreaming”



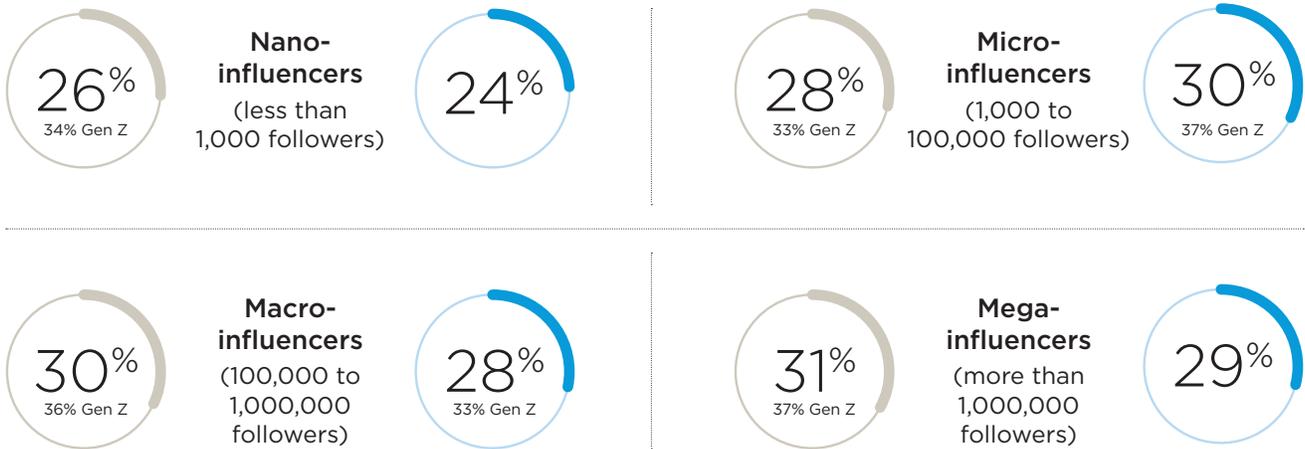
“I’m definitely the person that goes on Zillow and looks at million-dollar houses, and plans for the future, those types of things, fingers crossed.”

— MILLENNIAL WOMAN

THE FUTURE OF INFLUENCE IS MICRO

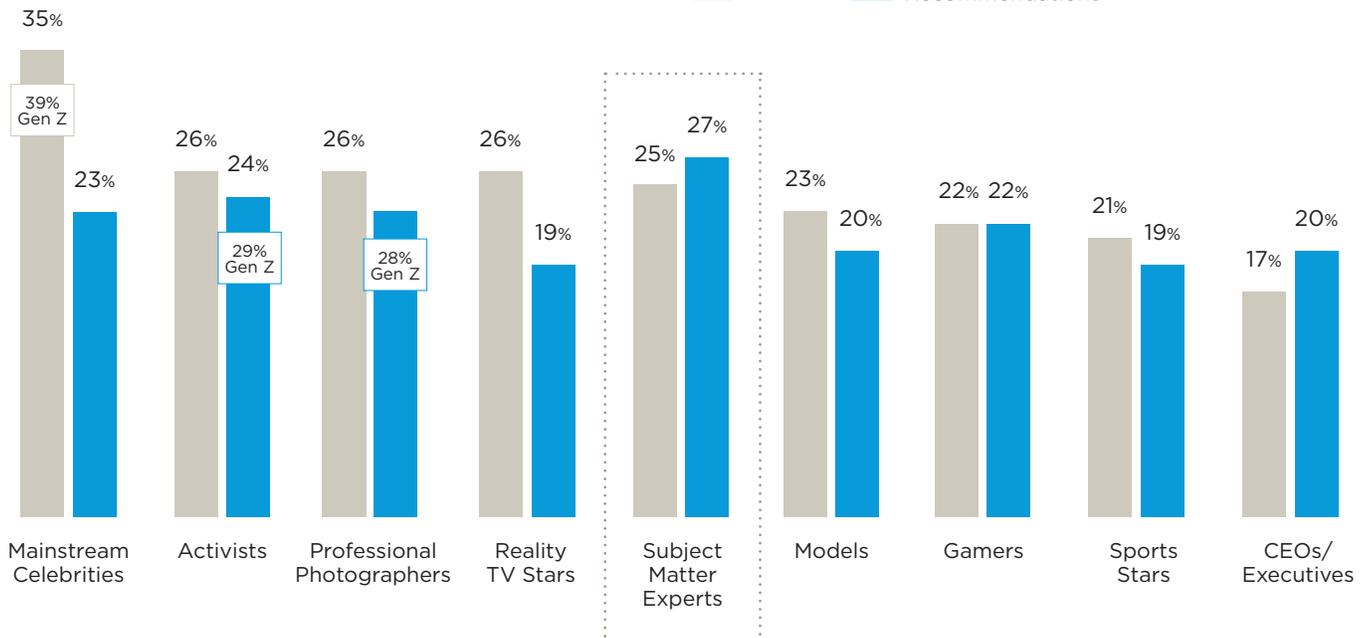
PLEASE INDICATE WHICH OF THE FOLLOWING TYPES OF SOCIAL MEDIA INFLUENCERS YOU FOLLOW AND WHICH, IF ANY, DO YOU TRUST WITH THEIR PRODUCT RECOMMENDATIONS?

(% of Women 40 and under) ■ Follow ■ Trust Their Product Recommendations



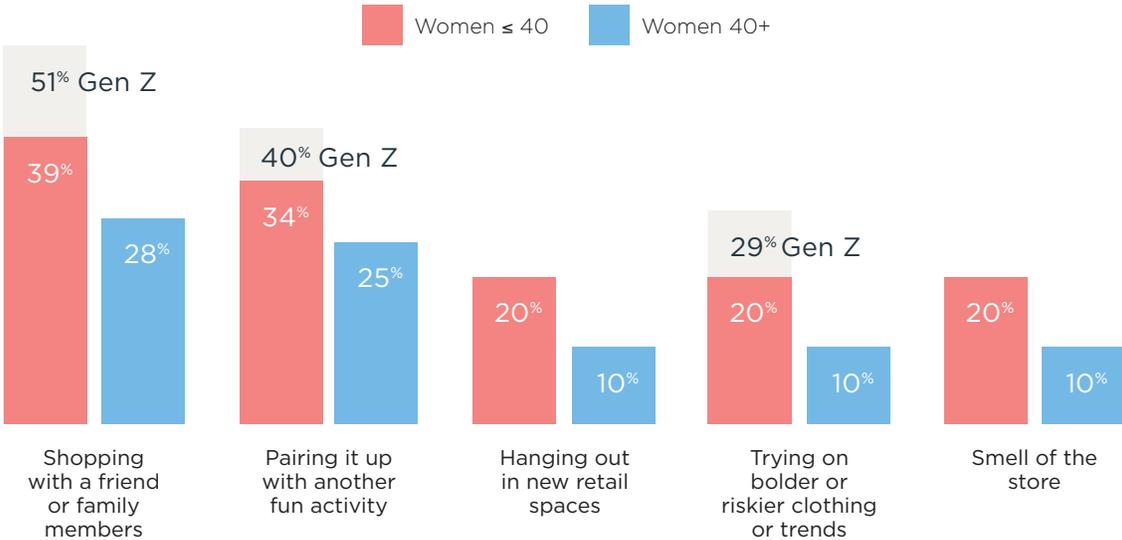
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(% of Women 40 and under) ■ Follow ■ Trust Their Product Recommendations

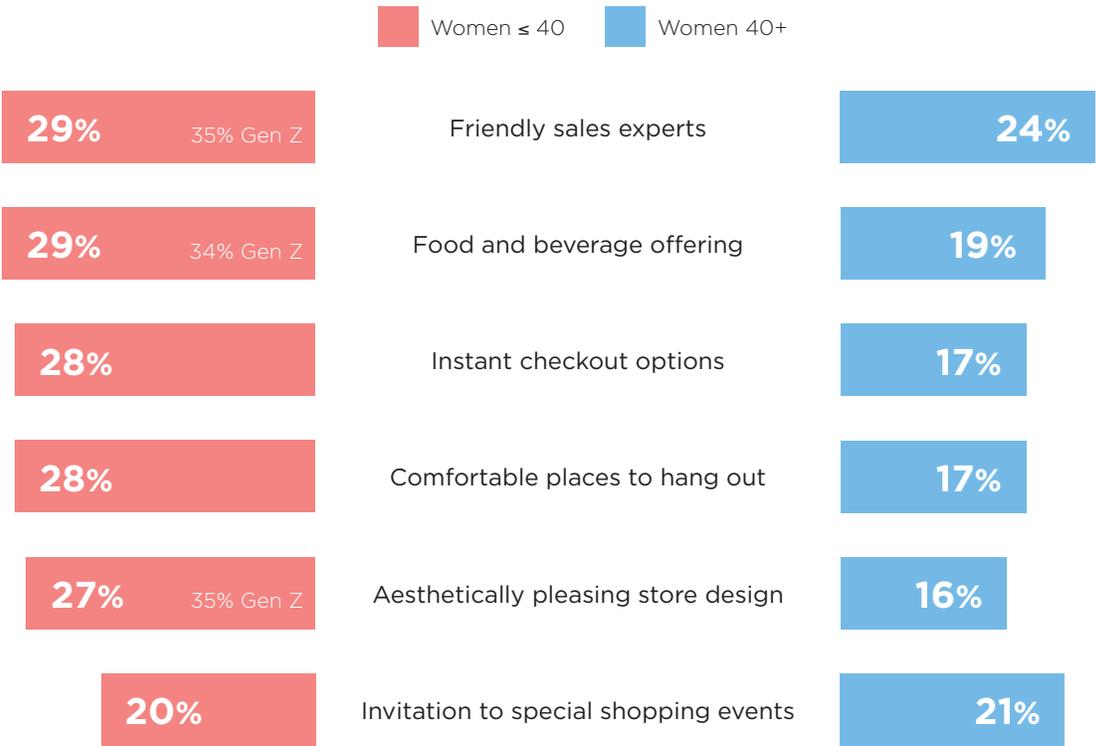


WOMEN ARE RESETTING THEIR IN-STORE RETAIL EXPECTATIONS

AS WE'RE EMERGING FROM THE PANDEMIC, WHAT ARE YOU EXCITED ABOUT WHEN IT COMES TO SHOPPING IN PERSON AGAIN?



WHICH, IF ANY, OF THE FOLLOWING WOULD INCREASE YOUR DESIRE TO GO TO A STORE IN PERSON?



2

RAISING THE BAR: IN-STORE RETAIL NEEDS A GLOW-UP

Women are excited to get back to in-store shopping, citing the tactile experience and instant gratification as the most anticipated elements. Women 40 and under are particularly seeking the social experience that comes with shopping in-store. Yet women imagine this experience looking different than it did pre-pandemic, with heightened expectations and new needs. Nearly half of women 40 and under admit, “everything looks outdated to me now as we exit the pandemic, so I’m looking forward to seeking new experiences” (47%).

Inclusive sizing is a top priority to tempt women back in stores across generations. Women 40 and under are also more likely to be wooed by upgrades like in-store food and beverage offerings and comfortable lounge spaces, while women over 40 are more concerned with Covid safety precautions.



3

THE RISING TIDE OF GUILT-FREE SHOPPING

One lasting impact of the Great Rewire is heightened intentionality around purchase choices. Our data shows that women are voting with their wallets, prioritizing employee treatment, “give back” programs and small business support. The pandemic has driven this small business-first mentality as 70% of women attest, “I witnessed a lot of local businesses struggle or go out of business, so I’m trying to shop locally more often.”

Sustainability is also an increasing driver of brand preference as women across generations agree, “I’m staying away from fast fashion because it’s unsustainable” (56%) and “shopping online is often wasteful with its packaging” (59%) -

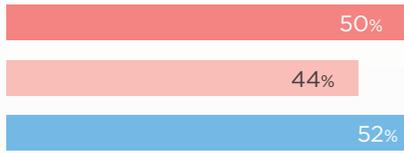
a number that is relatively consistent across generations. A similar majority of women 40 and under attest, “I have heavily relied on big online retailers during the pandemic, but plan on cutting back in the future” (58%).



ADDING ETHICS TO THE CART

I'M MORE INTERESTED IN SHOPPING AND SPENDING WITH BIG COMPANIES THAT...

Treat their staff and employees well



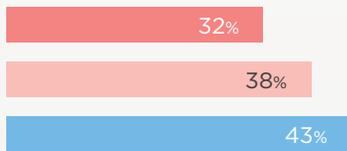
"Give back" (% of profits support a community in need)



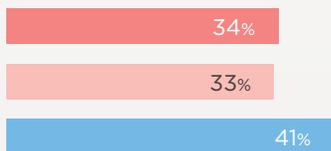
Support small businesses



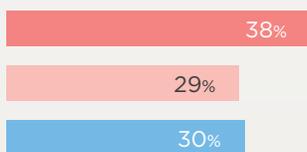
Help my local community



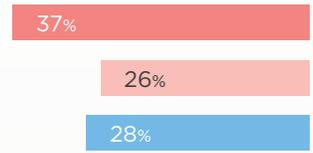
Build products and services I want



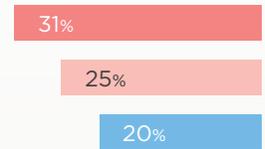
Take a strong position on diversity, equity and inclusion



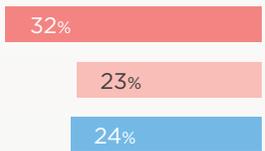
Take a stance on environmental issues (e.g., climate change)



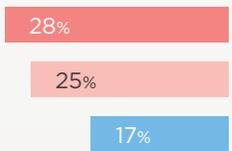
Take a stance on social issues



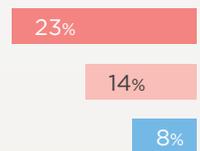
Build products/services that feel inclusive



Build products/services that reflect who I am

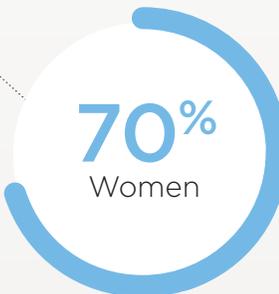


Support BIPOC owned companies & creators



"I will not support a retailer who makes their employees work on holidays."

47% Gen Z	44% Millennials
43% Gen X	34% Boomers



"I witnessed a lot of local businesses struggle or go out of business, so I'm trying to shop locally more often."

66% Gen Z	72% Millennials
74% Gen X	65% Boomers



To schedule a presentation of
the full report or to get customized
insights that relate to your brand,
please contact:

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THANK YOU!

