SPOTLIGHT*MOROCCO

SHOPPER BEHAVIOUR & ATTITUDES

July - 2024

Ipsos

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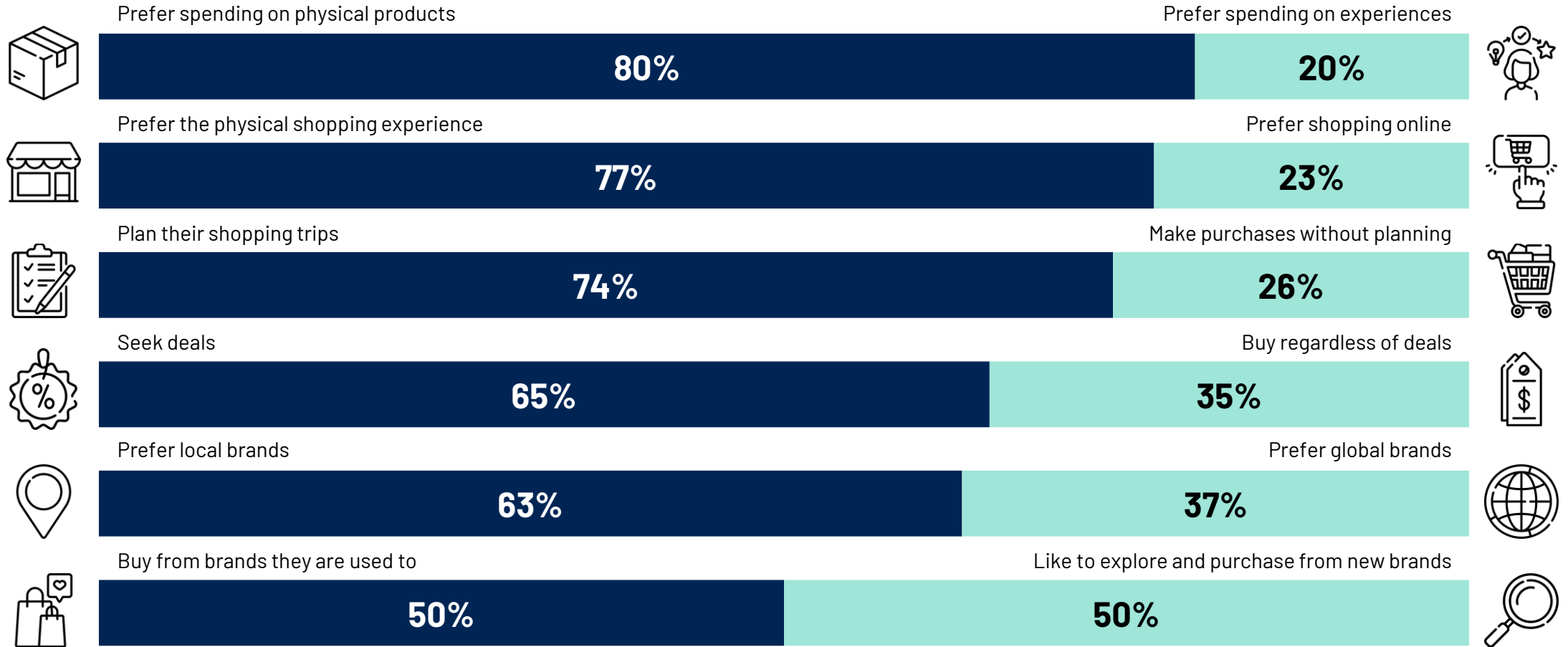
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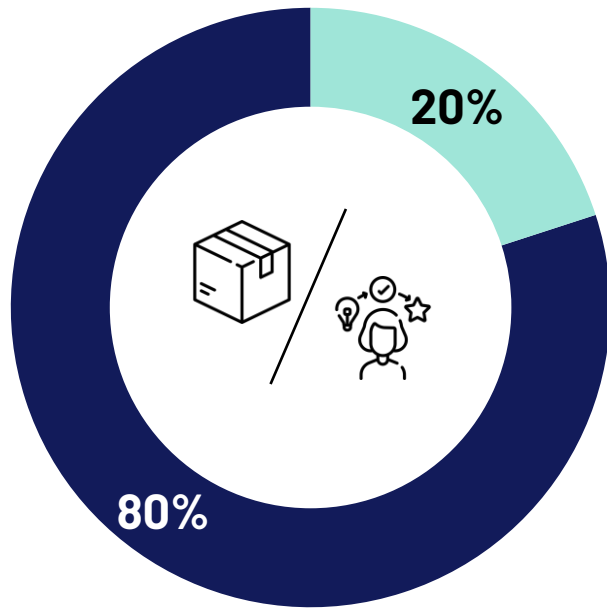
4 **Influencers on purchase decisions**

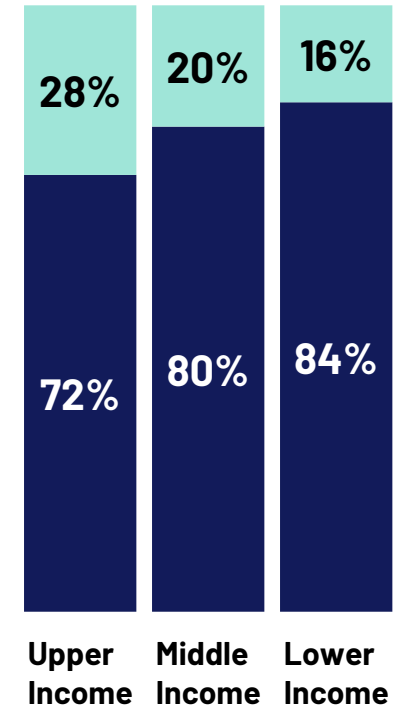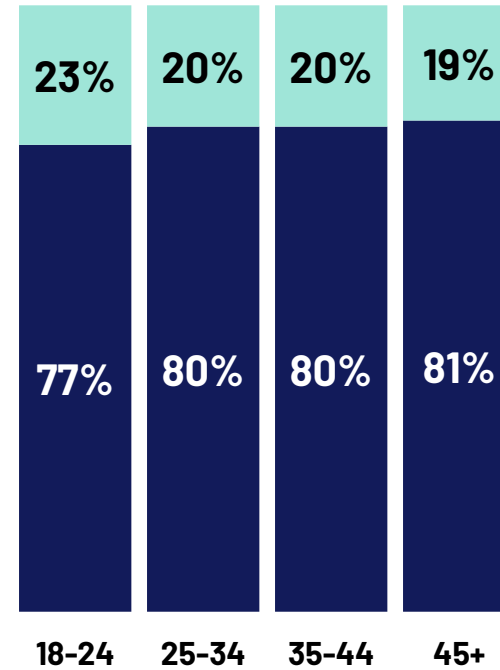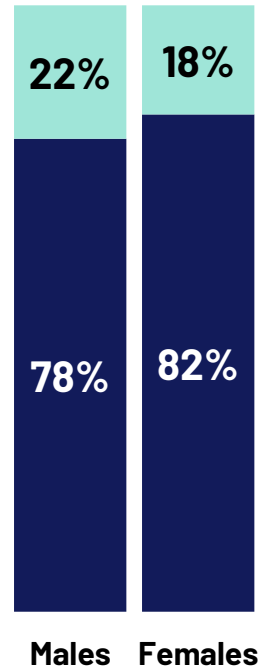# TYPES OF SHOPPERS IN MOROCCO

Shopper types

Prefer spending on physical products		Prefer spending on experiences
80%		**20%**
Prefer the physical shopping experience		Prefer shopping online
77%		**23%**
Plan their shopping trips		Make purchases without planning
74%		**26%**
Seek deals		Buy regardless of deals
65%		**35%**
Prefer local brands		Prefer global brands
63%		**37%**
Buy from brands they are used to		Like to explore and purchase from new brands
50%		**50%**

Physical products vs. experiences

% - by demographics

Donut chart:
- 80% Prefer spending on physical products
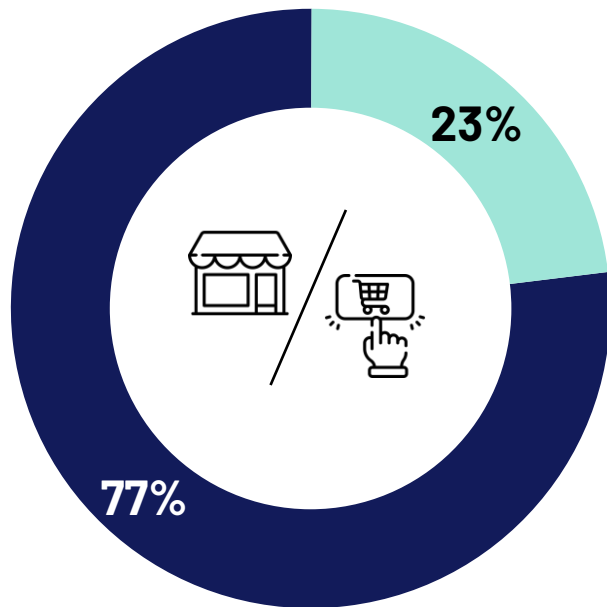- 20% Prefer spending on experiences

Legend:
- Prefer spending on physical products
- Prefer spending on experiences

Bar chart by gender:
- Males: 78% / 22%
- Females: 82% / 18%

Bar chart by age:
- 18-24: 77% / 23%
- 25-34: 80% / 20%
- 35-44: 80% / 20%
- 45+: 81% / 19%

Bar chart by income:
- Upper Income: 72% / 28%
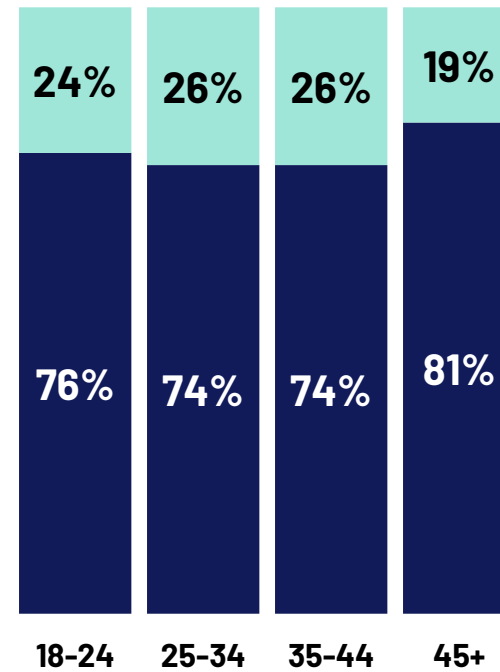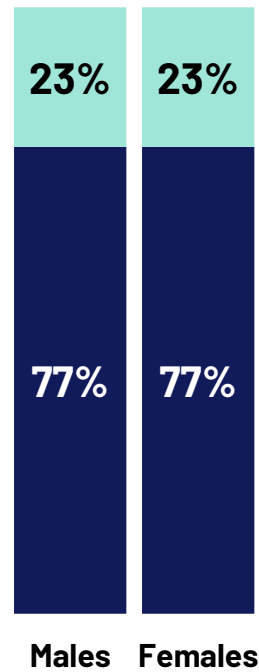- Middle Income: 80% / 20%
- Lower Income: 84% / 16%

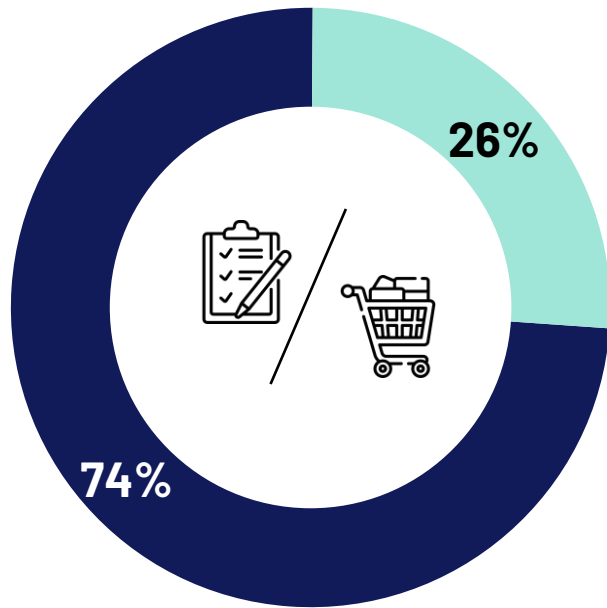# Physical vs. online shopping

% - by demographics

Prefer the physical shopping experience 77%
Prefer shopping online 23%

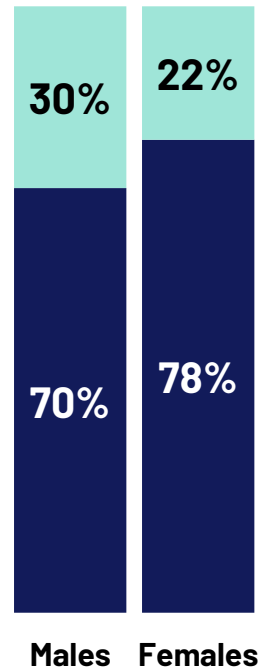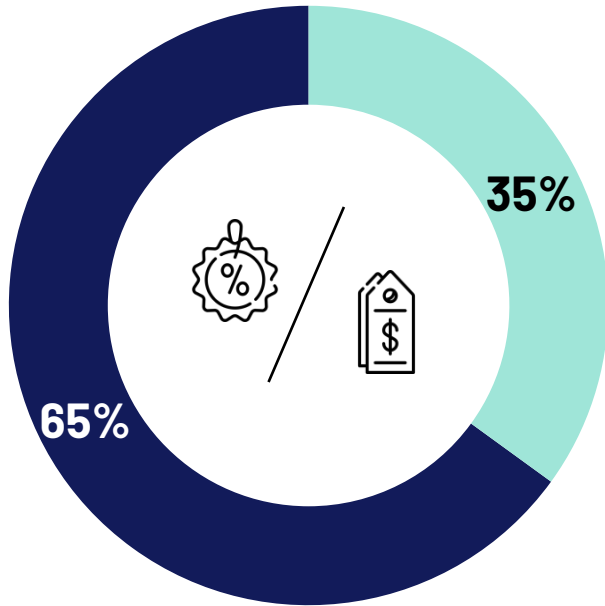|	Males	Females		18-24	25-34	35-44	45+		Upper Income	Middle Income	Lower Income
Online	23%	23%		24%	26%	26%	19%		31%	20%	25%
Physical	77%	77%		76%	74%	74%	81%		69%	80%	75%

Planned vs. unplanned shopping

% - by demographics

Plan their shopping trips
Make purchases without planning

	Males	Females		18-24	25-34	35-44	45+		Upper Income	Middle Income	Lower Income
Unplanned	30%	22%		31%	22%	31%	22%		34%	20%	24%
Planned	70%	78%		69%	78%	69%	78%		66%	80%	76%

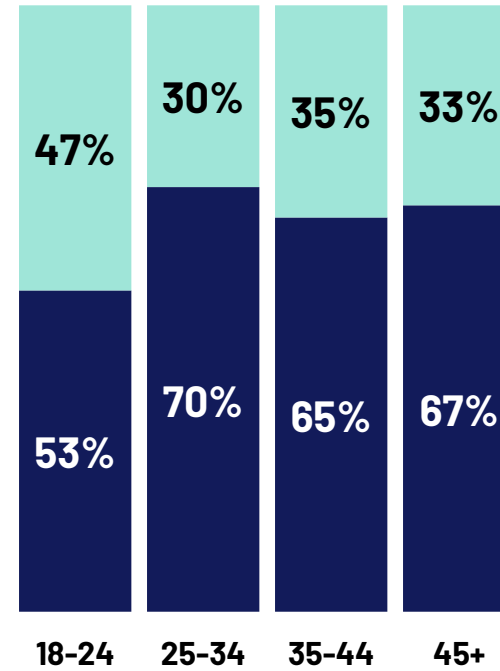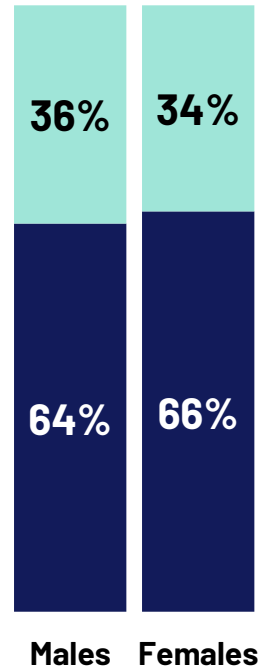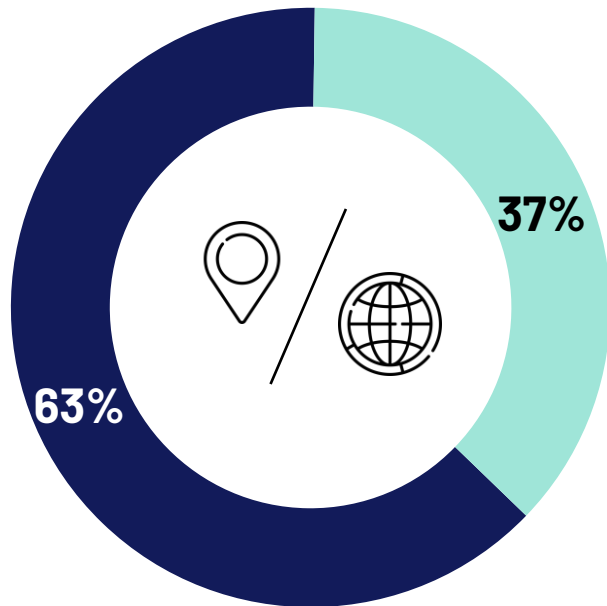Donut chart: 26% / 74%
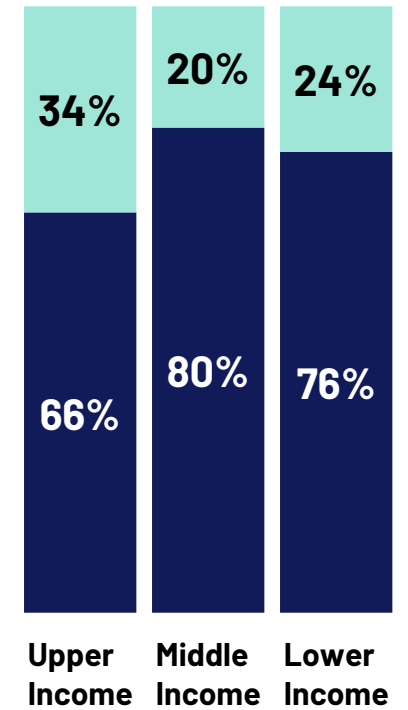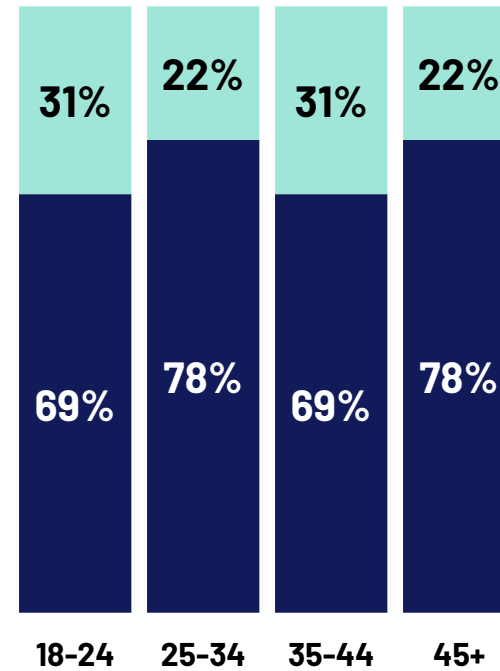
Deal seekers vs. non-deal seekers

% - by demographics

65% Are deal seekers
35% Buy regardless of deals

■ Are deal seekers
■ Buy regardless of deals

	Males	Females
Buy regardless of deals	36%	34%
Are deal seekers	64%	66%

	18-24	25-34	35-44	45+
Buy regardless of deals	47%	30%	35%	33%
Are deal seekers	53%	70%	65%	67%

	Upper Income	Middle Income	Lower Income
Buy regardless of deals	53%	29%	34%
Are deal seekers	47%	71%	66%
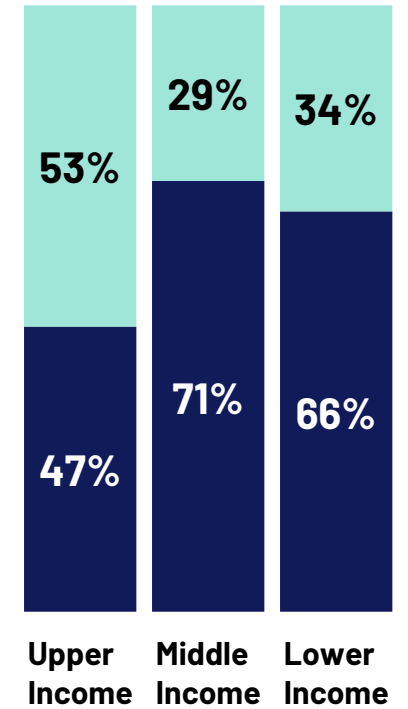
Local vs. international brands
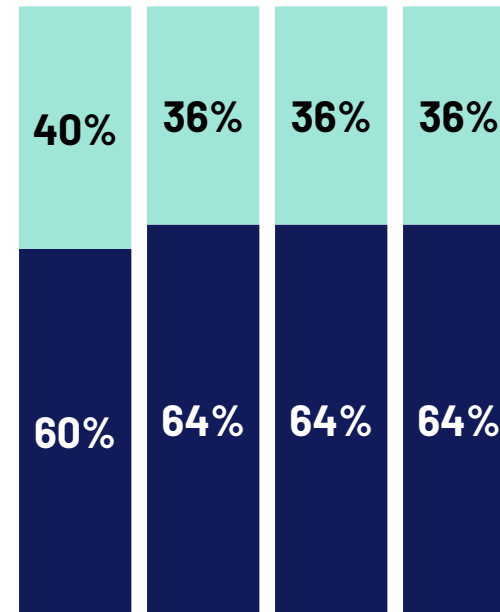
% - by demographics

Prefer local brands
Prefer global brands

63% / 37%

	Males	Females
Global	38%	35%
Local	62%	65%

	18-24	25-34	35-44	45+
Global	40%	36%	36%	36%
Local	60%	64%	64%	64%
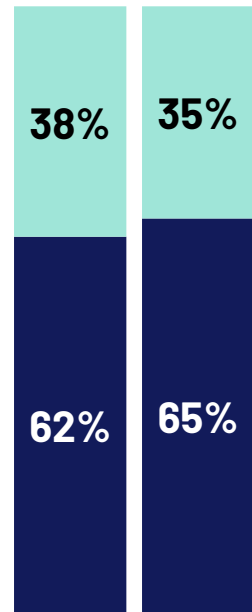
	Upper Income	Middle Income	Lower Income
Global	47%	40%	30%
Local	53%	60%	70%
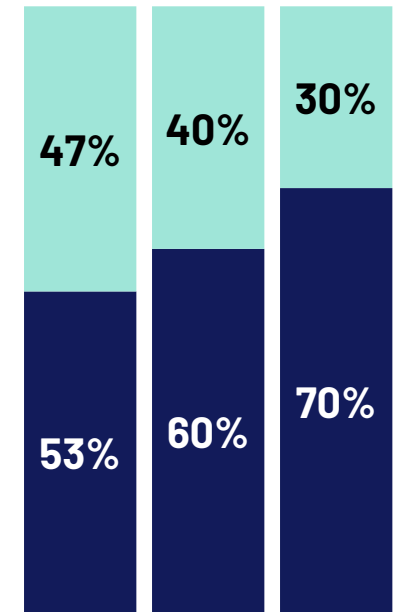
Purchasing usual brands vs. exploring new brands

% - by demographics

50% 50%

Buy from brands they are used to

Like to explore and purchase from new brands

	Males	Females		18-24	25-34	35-44	45+		Upper Income	Middle Income	Lower Income
Explore new	48%	52%		57%	50%	49%	48%		59%	46%	50%
Used to	52%	48%		43%	50%	51%	52%		41%	54%	50%
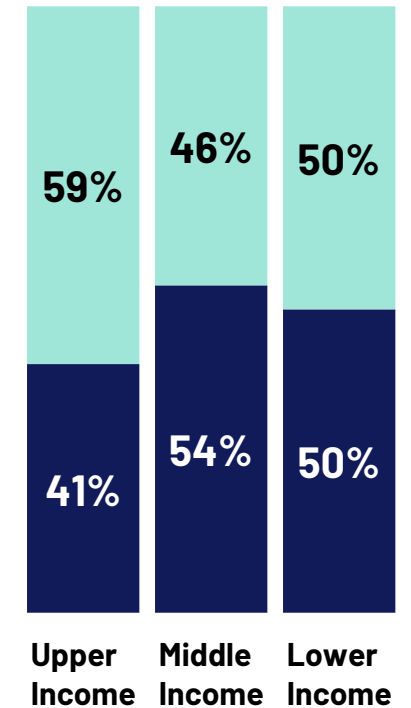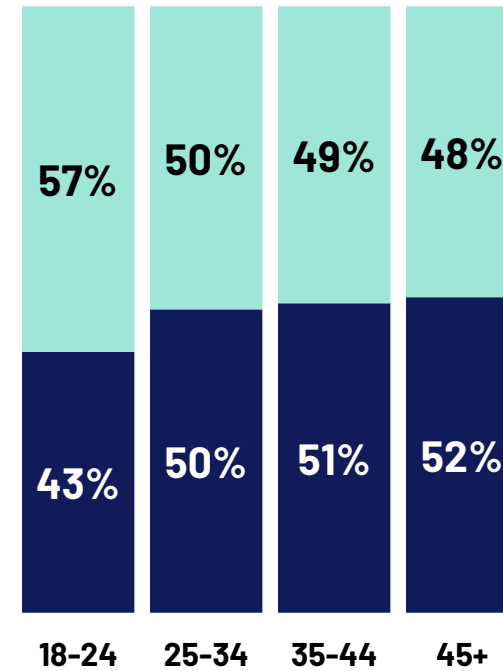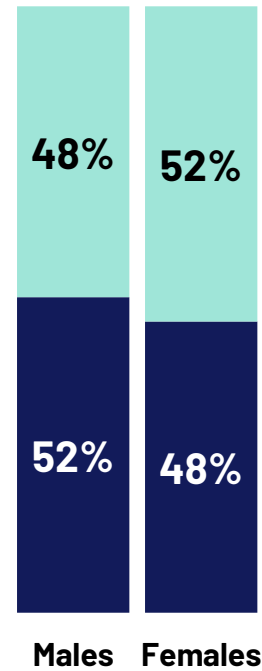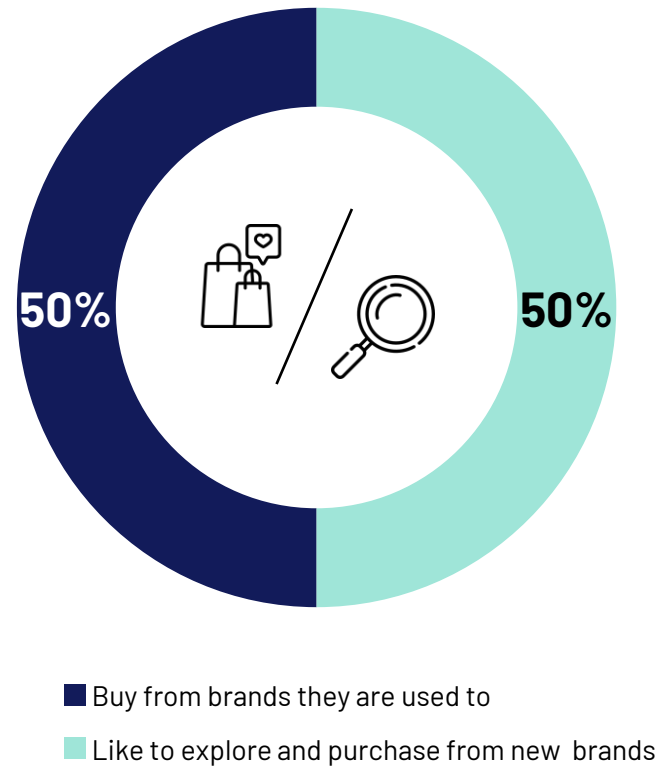
BRAND SELECTION CRITERIA
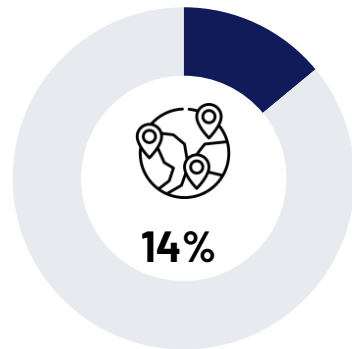
Brand selection criteria

78%
Prices and promotions

68%
Functional attributes*

39%
Emotional attributes*

25%
Referrals and reputation

14%
A brand's country of origin

13%
Brand ethics

13%
Customer service

4%
A brand's innovation

*Functional attributes include product quality, availability and variety of offering

*Emotional attributes include a brand's ability to understands and meet needs, make the consumer feel confident and inspired, create a sense of belonging and bring joy to consumer's life

Brand selection criteria

% – by demographics

	Prices and promotions	Functional attributes*	Emotional attributes*	Referrals and reputation	A brand's country of origin	Brand ethics	Customer Service	A brand's innovation
Total	**78%**	**68%**	**39%**	**25%**	**14%**	**13%**	**13%**	**4%**
Male	76%	64%	43%	26%	13%	16%	12%	4%
Female	80%	72%	35%	24%	15%	10%	13%	5%
18-24	68%	68%	42%	28%	16%	13%	18%	5%
25-34	78%	67%	38%	24%	12%	11%	12%	5%
35-44	76%	67%	39%	29%	16%	14%	8%	6%
45+	84%	69%	38%	21%	12%	13%	13+	3%
Upper Income	76%	77%	39%	21%	12%	10%	13%	9%
Middle Income	79%	65%	40%	26%	16%	11%	15%	5%
Lower Income	78%	67%	37%	24%	13%	15%	10%	3%
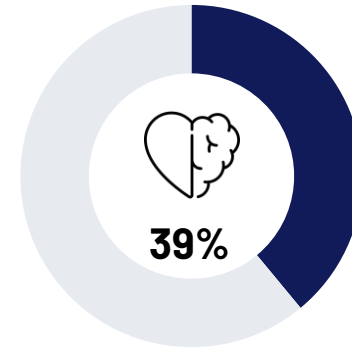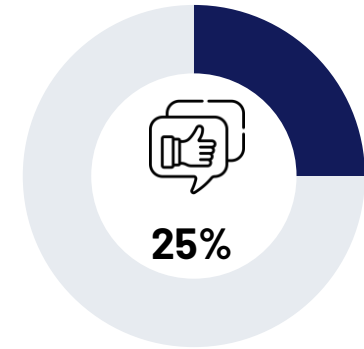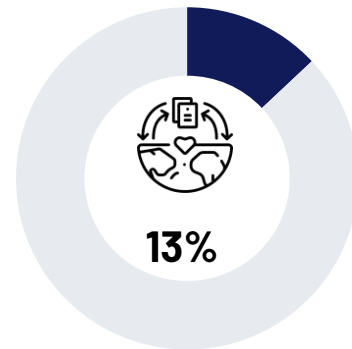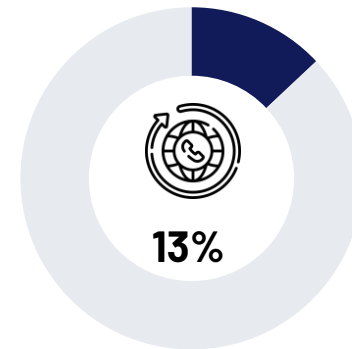
*Functional attributes include product quality, availability and variety of offering

*Emotional attributes include a brand's ability to understands and meet needs, make the consumer feel confident and inspired, create a sense of belonging and bring joy to consumer's life

WHERE DO PEOPLE OBTAIN INFORMATION ABOUT BRANDS?

Sources used to obtain information about brands

86%

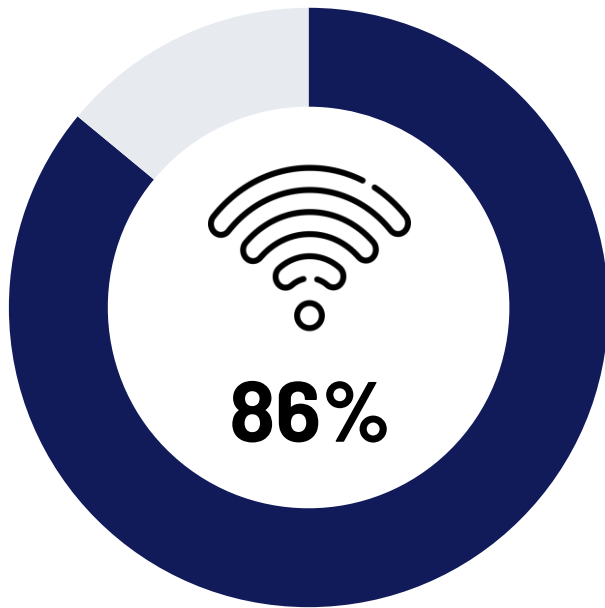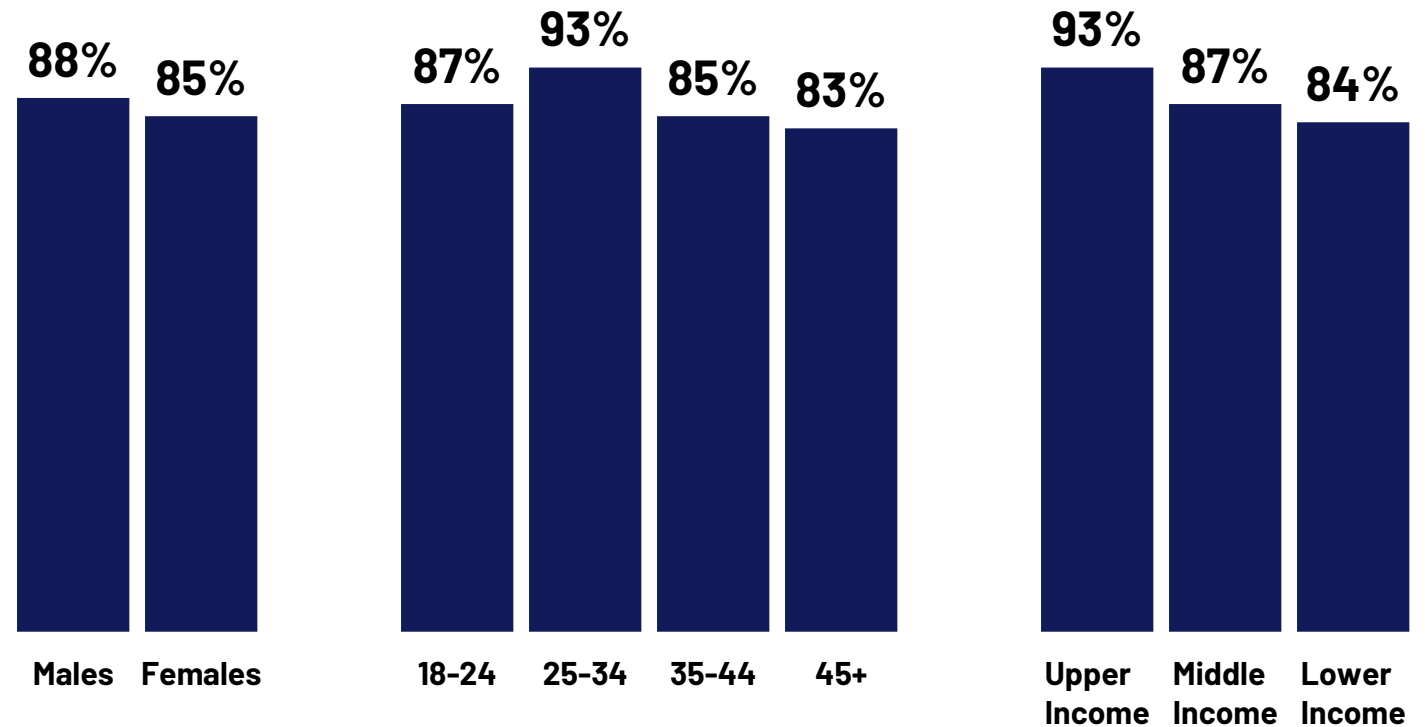Use <u>online</u> sources to obtain information about brands

75%

Use <u>offline</u> sources to obtain information about brands

Using online sources to obtain information about brands
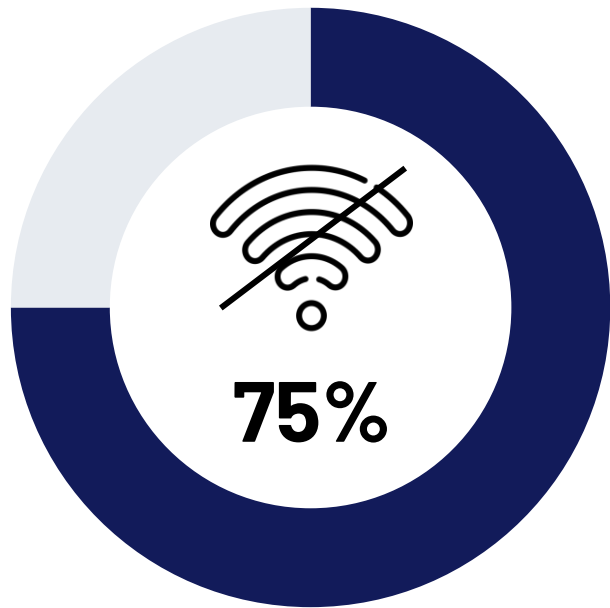
% – by demographics

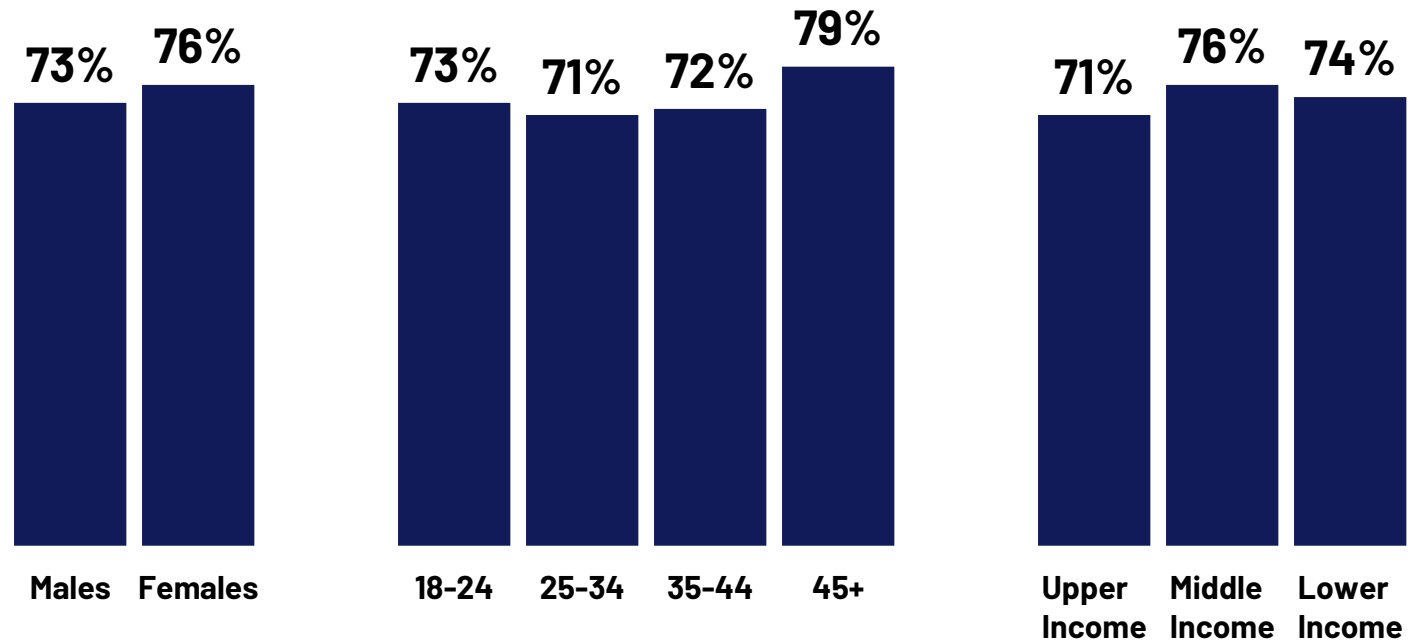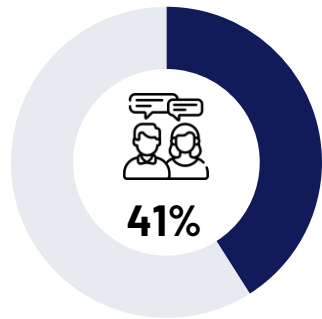**86%**

Use <u>online</u> sources to obtain information about brands

Males	Females
88%	85%

18-24	25-34	35-44	45+
87%	93%	85%	83%

Upper Income	Middle Income	Lower Income
93%	87%	84%

Using offline sources to obtain information about brands

% – by demographics

75%

Use <u>offline</u> sources to obtain information about brands
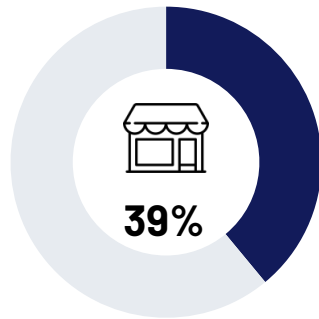
73%	76%	
Males	**Females**	

73%	71%	72%	79%
18-24	**25-34**	**35-44**	**45+**

71%	76%	74%
Upper Income	**Middle Income**	**Lower Income**

Sources used to obtain information about brands
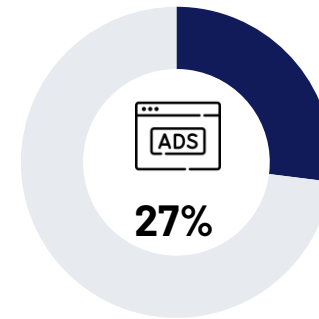
– Detailed

41% Word of mouth

39% Directly at the physical store/ outlet

37% Social media platforms

32% Online reviews and ratings

27% Online advertisements
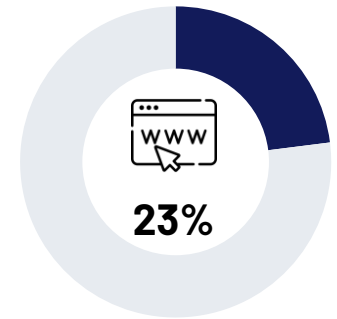
23% Company/ brand websites

17% E-commerce platforms

14% Traditional media

12% Influencers

10% Blogs/forums/ online communities

10% Billboards and outdoor advertisements

5% Email newsletter subscriptions

Sources used to obtain information about brands

Detailed - by demographics

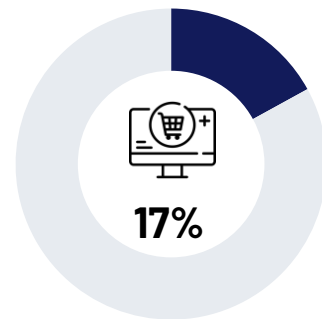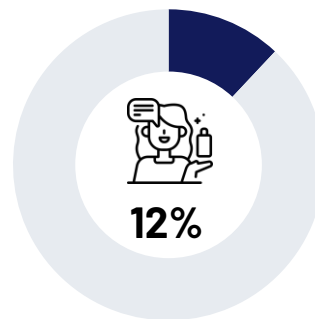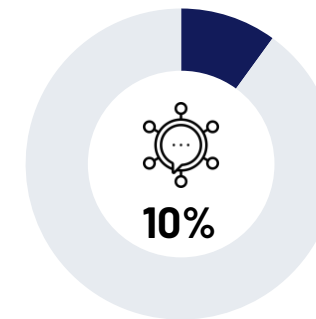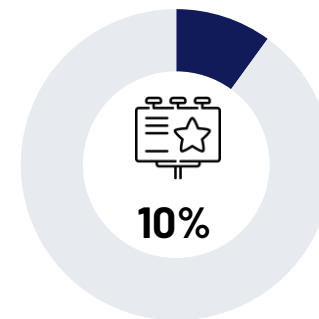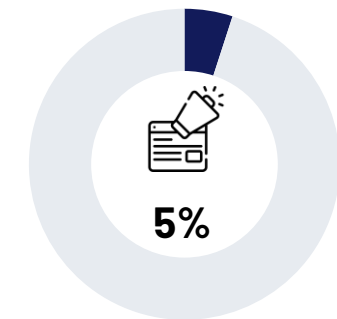|	Word of mouth	Directly at the physical store	Social media platforms	Online reviews and ratings	Online ads	Brand websites	E-Commerce platforms	Traditional media	Influencers	Online communities	Outdoor ads	Email newsletter
Total	**41%**	**39%**	**37%**	**32%**	**27%**	**23%**	**17%**	**14%**	**12%**	**10%**	**10%**	**5%**
Male	40%	38%	39%	31%	25%	24%	21%	15%	10%	10%	11%	5%
Female	42%	39%	35%	32%	29%	22%	13%	13%	14%	10%	9%	5%
18-24	41%	34%	31%	30%	27%	19%	17%	14%	20%	9%	6%	6%
25-34	32%	38%	36%	33%	31%	32%	18%	15%	17%	10%	11%	7%
35-44	43%	34%	39%	27%	27%	21%	18%	16%	9%	7%	14%	3%
45+	45%	45%	38%	34%	24%	20%	15%	13%	7%	12%	8%	4%
Upper Income	40%	36%	39%	38%	24%	34%	21%	12%	13%	11%	8%	4%
Middle Income	39%	43%	37%	35%	30%	21%	17%	12%	12%	12%	12%	6%
Lower Income	41%	38%	35%	28%	26%	22%	17%	16%	11%	8%	10%	4%

INFLUENCERS ON PURCHASE DECISIONS

Checking reviews before making purchases

%Agree – by demographics

47%
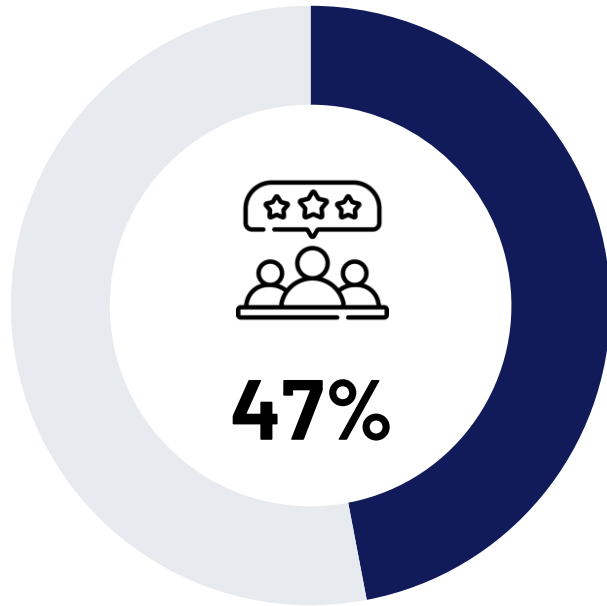
I always check the reviews of other customers before making any purchase

Males	Females
47%	46%

18-24	25-34	35-44	45+
47%	51%	47%	43%

Upper Income	Middle Income	Lower Income
42%	56%	42%
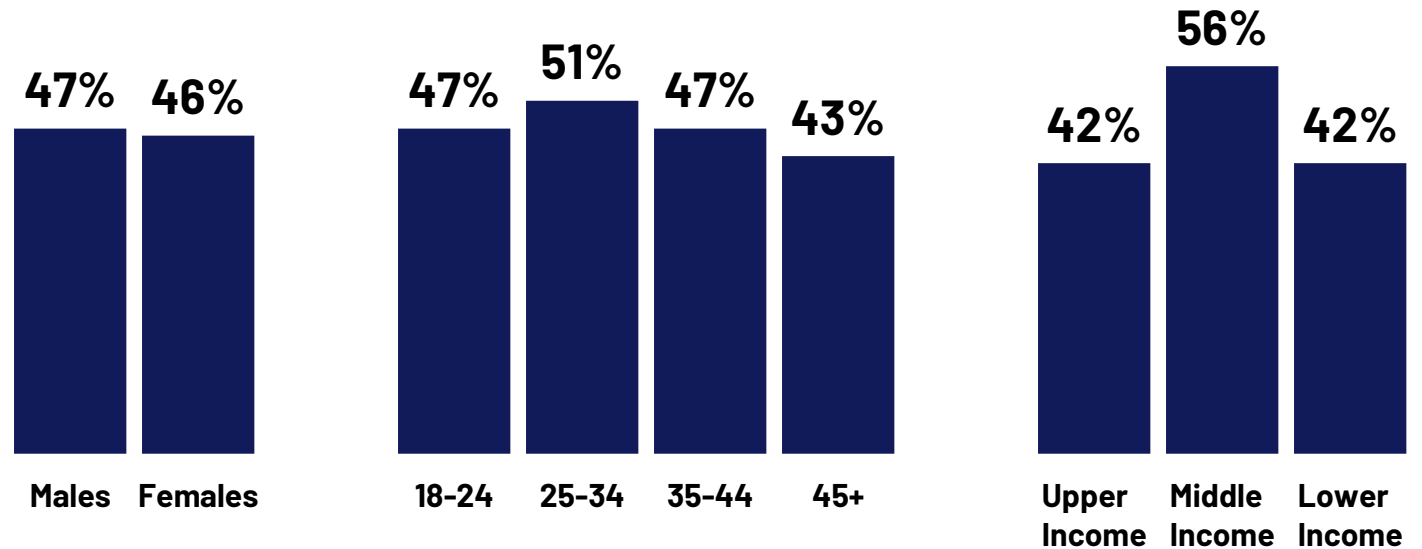
Most trusted sources impacting purchase decisions

36%
Recommendations from experts or industry professionals

32%
Recommendations/ word of mouth from people

28%
Online reviews from others

4%
Influencers/ celebrities

Most trusted sources impacting purchase decisions

% – by demographics

	Recommendations from experts or industry professionals	Recommendations/ word of mouth from people	Online reviews from others	Influencers/ celebrities
Total	**36%**	**32%**	**28%**	**4%**
Male	39%	32%	26%	3%
Female	33%	33%	30%	4%
18–24	30%	35%	32%	3%
25–34	31%	36%	25%	7%
35–44	36%	30%	33%	2%
45+	42%	30%	25%	3%
Upper Income	43%	31%	22%	3%
Middle Income	32%	33%	32%	4%
Lower Income	39%	32%	27%	3%

Sample and methodology

Sample size
500 respondents

Sample criteria
General public
representative of the population across gender and age (18+)

Methodology
The survey was conducted via Ipsos online panel

Geographical coverage
Conducted in Morocco
with a nationwide coverage

FOR MORE INFORMATION

Luc Durand
Managing Director
Ipsos in Morocco & Algeria
luc.durand@ipsos.com

Meryem Koutbi
Senior Client Officer
Ipsos in Morocco
meryem.koutbi@ipsos.com

Ipsos