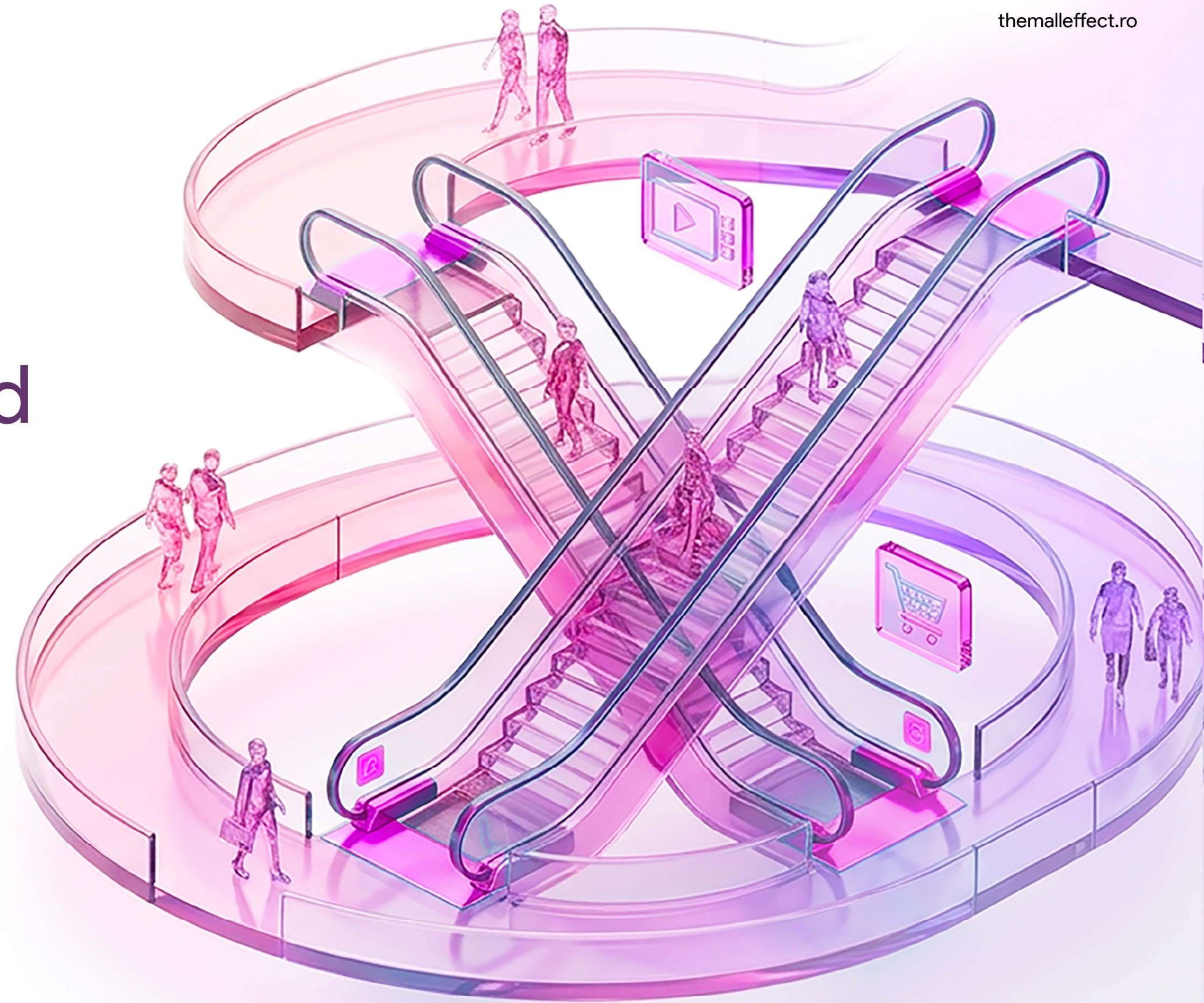


# RESEARCH REPORT

## Consumers' usage, attitudes, preferences and expectations towards Shopping Malls





## SAMPLE

**806**  
Interviews

Large cities  
(Bucharest, Cluj-Napoca, Iasi,  
Constanta, Timisoara)



## METHODOLOGY

Computer Assisted Web  
Interviews

**CAWI**

**7-10**  
minutes

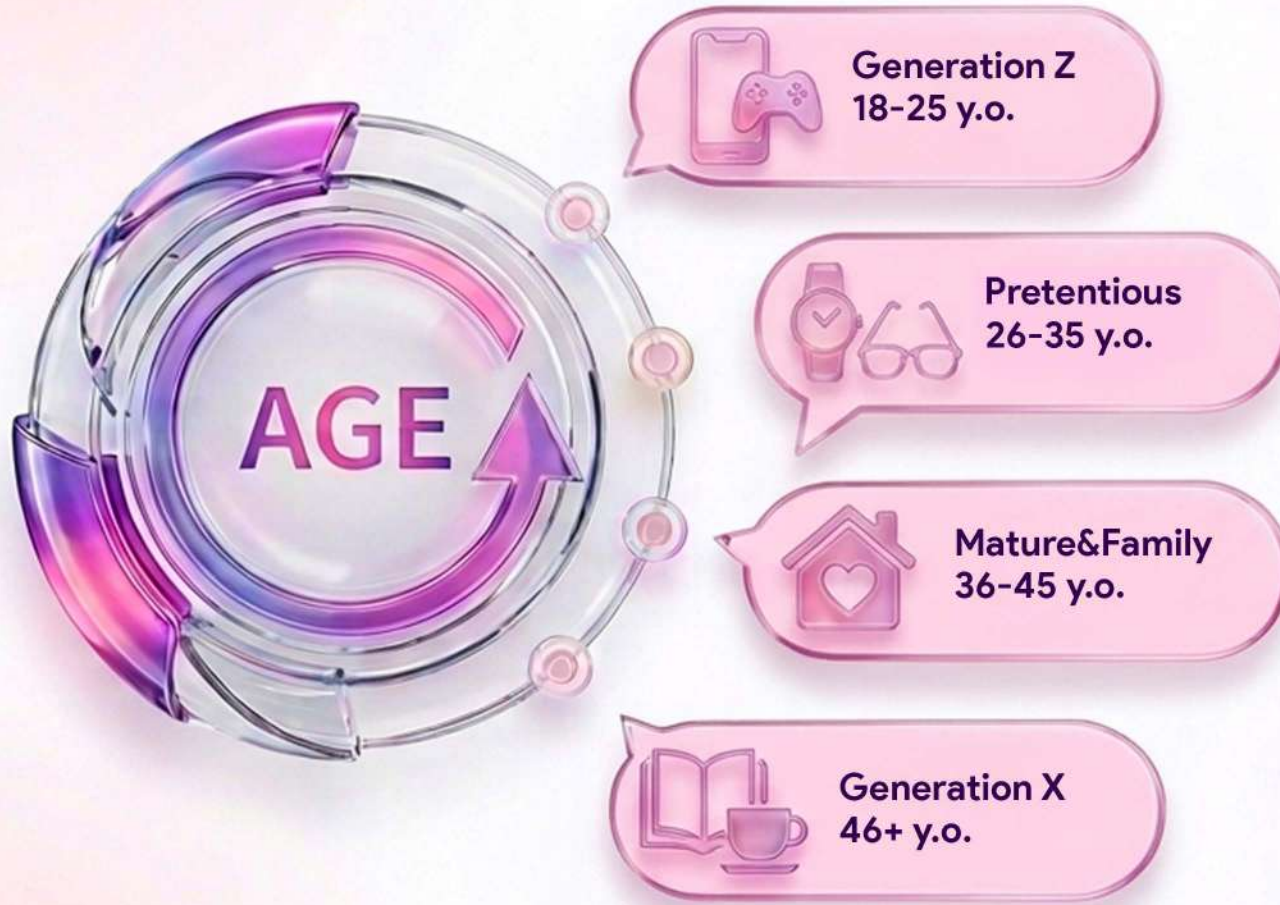


## TARGET GROUP

- Gender: Male and female
- Age: over 18 y.o.
- Living in urban areas - large cities
- Go to a shopping mall at least once/month
- Online users

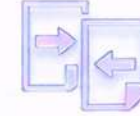
Results are compared to the  
2025 wave: 803 respondents

Data collection period: March 2026



## LEGEND

### MARKING DIFFERENCES



For the current wave, comparison to total sample

Significantly **higher** than the total for current wave

Significantly **lower** than the total for current wave

Comparing the current wave with the previous one



Significantly **higher** than previous wave



Significantly **lower** than previous wave

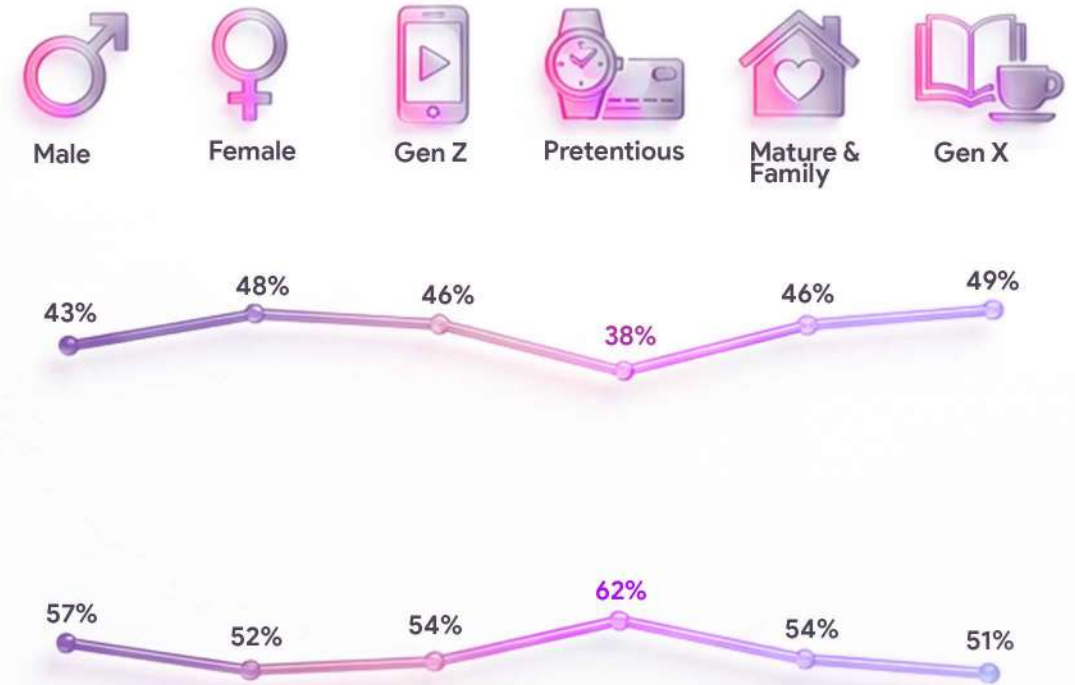
# Detailed results



# Frequency of mall visits

N = 806 (2026) / 803 (2025), all respondents

Q: How often do you usually go to the mall?



- Mall visitation remains consistently high and habitual, with **over half of visitors entering malls weekly or more often**, confirming malls as a high-frequency touchpoint rather than an occasional destination.
- This sustained traffic across all demographic segments, especially among younger and more affluent audiences. This creates a strong opportunity for repeated exposure, making indoor advertising particularly effective when built around continuity, visual impact, and proximity to purchase moments.

# Optimal travel time and distance to the mall

N = 660 (2026) / 651 (2025), respondents who have seen advertising in the mall

Q: How much time are you willing to allocate for the trip to the mall?



● Mall visitors are willing to allocate on average 52 minutes for the trip, a stable and relatively high threshold that highlights strong motivation and intentionality behind mall visits. This indicates that malls are perceived as valuable destinations worth the effort, reinforcing the opportunity for brands to engage audiences in a mindset that is already open, planned, and receptive to discovery and interaction.

Q: And what is the distance in km that you usually travel to get to the mall?

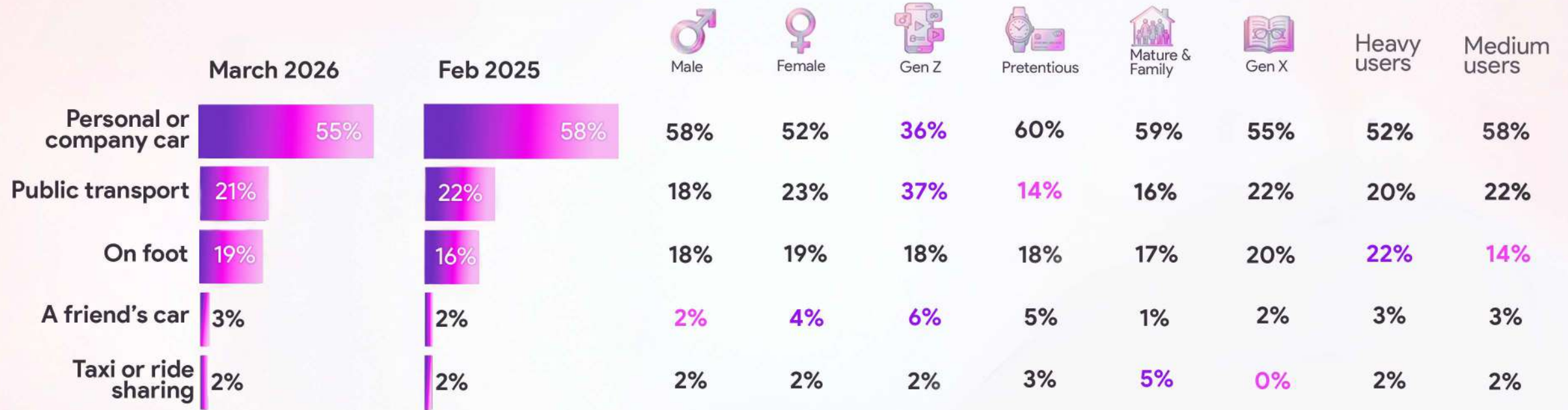


● The significant decrease in average travel distance (from 16 km to 9 km) is largely driven by this year's focus on respondents from big cities, where malls are more accessible and integrated into daily routines. This proximity enhances the role of malls as convenient, frequently visited touchpoints, making them even more relevant for targeted, high-frequency indoor campaigns that can capitalize on repeated exposure within a well-defined urban audience.

# Means of transportation used

N = 806 (2026) / 803 (2025), all respondents

Q: What means of transport do you usually use to get to the mall?



● Mall access remains predominantly car-driven (55%), confirming the importance of parking areas and entry points as key moments for brand exposure, while the stable presence of public transport (21%) and the notable increase in walking (19%) highlight a growing share of visitors arriving from nearby urban areas. This reinforces malls as integrated parts of daily city life, where campaigns can effectively combine high-impact formats at entrances with tactical placements along pedestrian flows to capture both planned and spontaneous visits.

# Visiting behaviour

N = 806 (2026) / 803 (2025), all respondents

Q: What time of the week do you usually go to the mall?



	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy users	Medium users
In the weekend	52%	52%	56%	52%	51%	51%	48%	56%
Does not matter	33%	31%	33%	32%	32%	31%	35%	28%
On working days	16%	17%	11%	16%	17%	18%	17%	15%

Q: What is the time you spend, on average, for a visit to the mall?

## Visit Duration



	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy users	Medium users
Average Duration	155%	159%	177%	156%	154%	153%	160%	154%

Mall visits are predominantly concentrated in the **weekend** (52%), but with a significant 32% stating timing does not matter (especially among heavy users – 35%), indicating a flexible and continuous flow of visitors throughout the week.

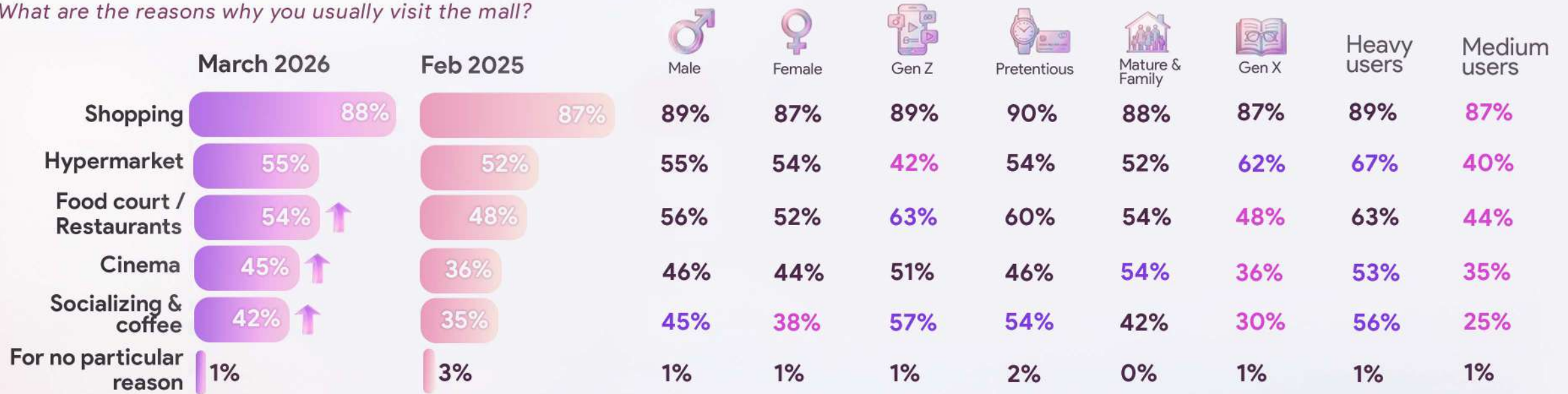
Although visit duration has decreased (157 vs. 208 minutes), this shift is partly influenced by the current sample structure, focused on large urban areas, where consumers tend to be more pragmatic and goal-oriented in their visits. Despite shorter stays, time spent remains substantial, confirming that malls continue to offer strong opportunities for engagement, combining efficient visits with meaningful exposure time.

# Reasons to visit the mall, average amount spent

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N = 806 (2026) / 803 (2025), all respondents

Q: What are the reasons why you usually visit the mall?



Q: What is the average amount of money you spend per visit to the mall?

Shopping remains the primary driver of mall visits (88%), but there is a clear strengthening of experiential motivations, with notable increases in food & restaurants, cinema, and socializing. This highlights the mall's evolving role from a purely transactional space to a multi-purpose social and leisure destination, where visitors seek combined experiences rather than single-purpose trips. For brands, this creates more touchpoints to engage consumers in relaxed, receptive contexts beyond pure shopping missions.



The average spend per visit has slightly increased (383 vs. 370 Lei), indicating that despite more pragmatic and potentially shorter visits, consumers maintain strong purchasing power and intent. This suggests that mall visits remain high-value occasions, where exposure to relevant messaging can directly influence spending decisions, reinforcing the importance of proximity-driven and conversion-oriented indoor campaigns.

# Companions for Mall and Hypermarket visits

N = 806 (2026) / 803 (2025), all respondents

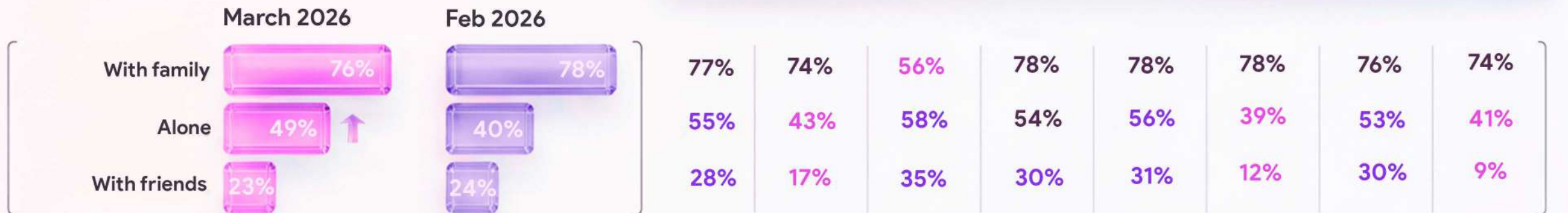
Q: Who do you usually go to the mall with?



Mall visits are predominantly social, with a **strong orientation towards family** (75%), but with a notable **increase in visits with friends** (45%) and alone (42%), indicating a diversification of visit contexts. This suggests that **malls serve multiple roles**, from family-oriented destinations to spaces for socializing or individual, task-driven visits, creating varied moments where brands can tailor messaging to both group experiences and more personal, decision-focused journeys.

N = 441 (2026) / 416 (2025), respondents who go to the hypermarket in the mall

Q: Who do you usually go to the hypermarket in the mall with?

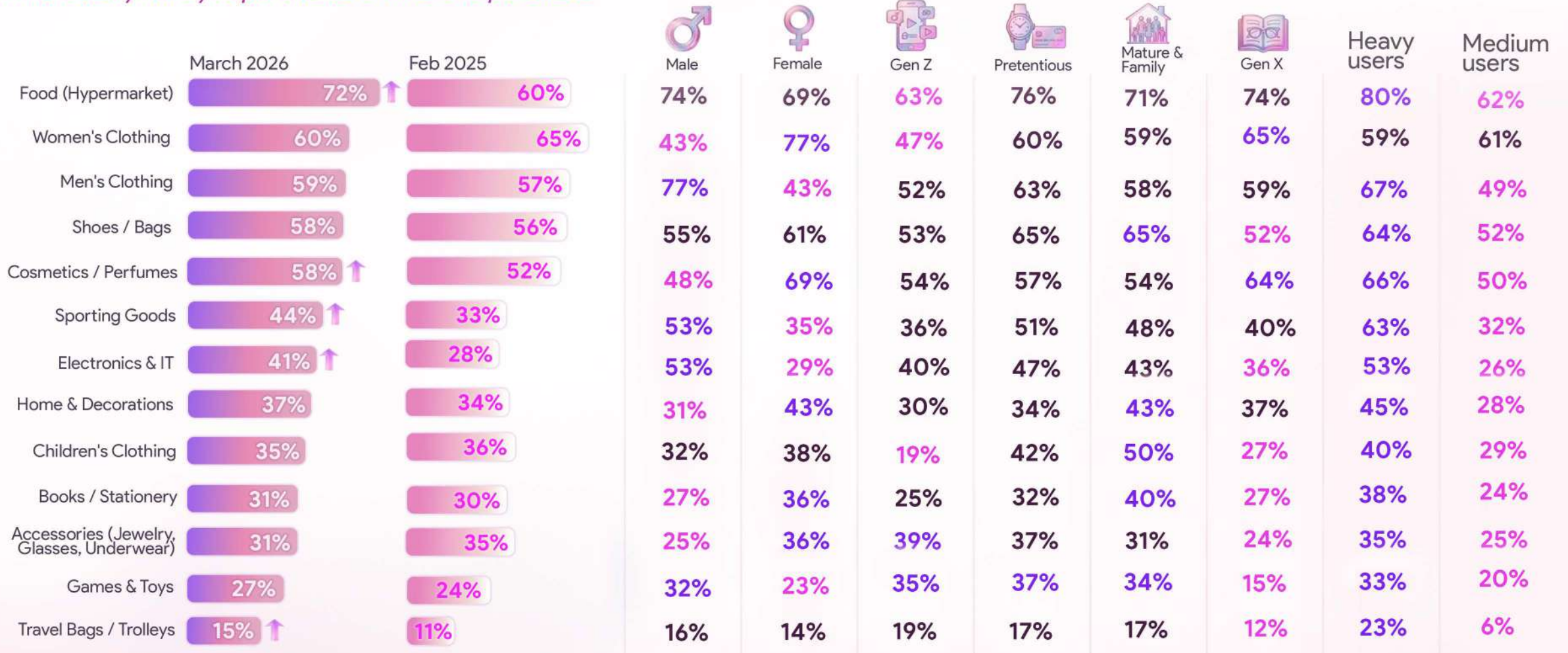


Hypermarket visits remain primarily functional and family-driven (76%), but the significant increase in solo visits (49%) highlights a shift towards more efficient, mission-based shopping behaviors. This duality suggests that while family shopping remains important, there is a growing opportunity to engage individual shoppers through targeted, conversion-oriented messaging in proximity to purchase, where decisions are quicker and more focused.

# Mall purchases

N = 711 (2026) / 699 (2025), respondents who go to the mall for shopping

Q: What exactly have you purchased or intend to purchase?



Mall purchases are increasingly diversified, with strong growth in categories such as hypermarket food, cosmetics, electronics, and sporting goods, indicating that visitors are combining routine shopping with more discretionary and lifestyle-driven purchases. This reinforces the mall's role as a one-stop destination, where multiple needs are fulfilled in a single visit, creating valuable opportunities for cross-category visibility and influencing decisions across both planned and impulse purchases.

# Advertising displayed in the mall

N = 806 (2026) / 803 (2025), all respondents

Q: Do you remember seeing advertising displayed in the mall?



	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy users	Medium users
Yes	83%	81%	92%	88%	81%	76%	88%	75%
No	17%	19%	8%	12%	19%	24%	12%	25%

Mall advertising achieves very high visibility, with 82% of visitors recalling having seen ads, confirming the environment as a powerful awareness channel with consistent reach across all segments, especially among younger and more active visitors. This highlights the strength of malls as controlled, clutter-reduced spaces where brands can secure strong attention and memorability.

Q: Which of these caught your attention?

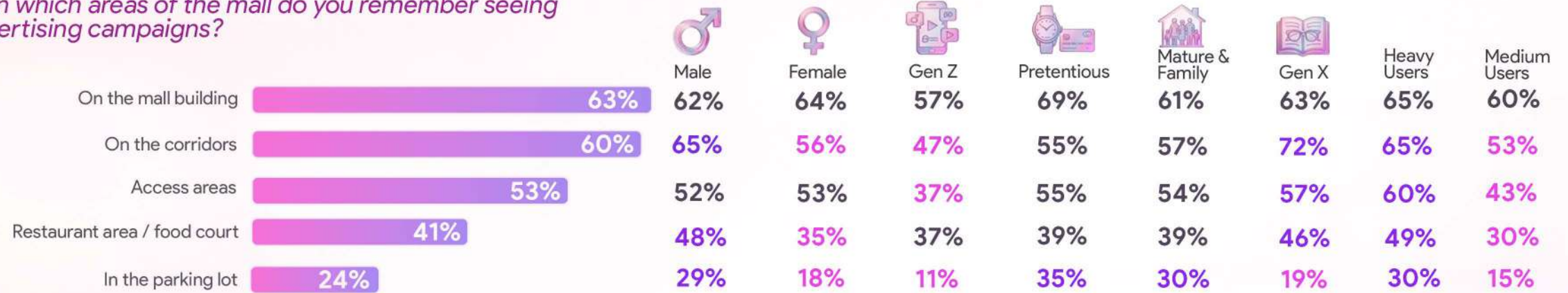
	March 2026	Feb 2025	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy users	Medium users
Illuminated panels	62% ↑	55%	67%	58%	47%	62%	57%	74%	69%	53%
Digital screens	60%	NA	66%	54%	63%	53%	57%	65%	69%	52%
Entrance doors	40%	56%	43%	38%	31%	56%	44%	32%	45%	33%
Escalators	40% ↓	40%	42%	38%	41%	47%	42%	34%	46%	32%
Promotional stands	39%	NA	39%	38%	30%	35%	36%	46%	41%	35%
Flags hanging from the ceiling	18%	19%	21%	15%	17%	23%	11%	21%	24%	9%

**Illuminated panels** (62%) and digital screens (60%) are the most effective formats in capturing attention, outperforming traditional placements such as entrance doors, which show a decline. This indicates a clear preference for dynamic and visually impactful formats, reinforcing the need for brands to prioritize high-quality, engaging executions that stand out and enhance recall within the mall environment.

# Noticing advertising in the mall

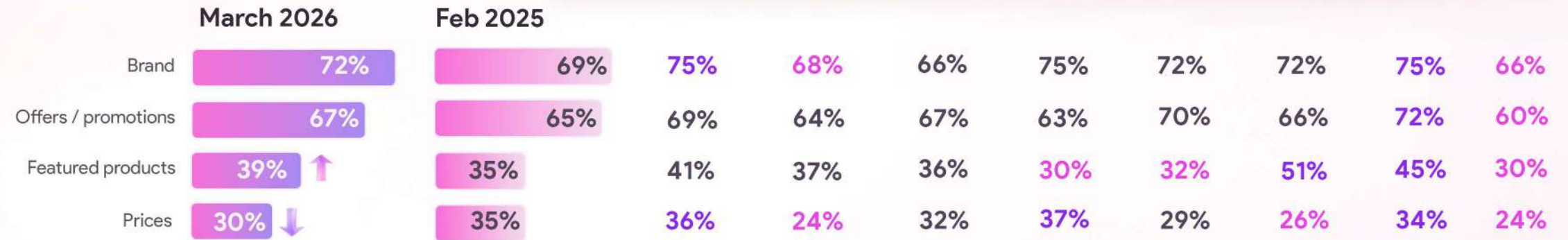
N = 660 (2026) / 651 (2025), respondents who have seen advertising in the mall

Q: In which areas of the mall do you remember seeing advertising campaigns?



Q: And what do you remember seeing in the advertising displayed in the mall?

Advertising is most noticed on the mall building (63%) and along main corridors (60%), confirming that high-traffic, high-visibility areas remain the most effective for capturing attention. Access areas and food courts also play a meaningful role, while parking areas are less impactful, highlighting the importance of placing campaigns along natural consumer flows where dwell time and visibility are maximized.



Consumers primarily recall brand (72%) and promotional messages (67%), while attention to featured products is increasing, and price-focused messaging is declining. This suggests that mall advertising is particularly effective for brand building and contextual influence, where creative storytelling and offer framing drive recall more than purely price-led communication.

# Content recall and effect of mall advertising

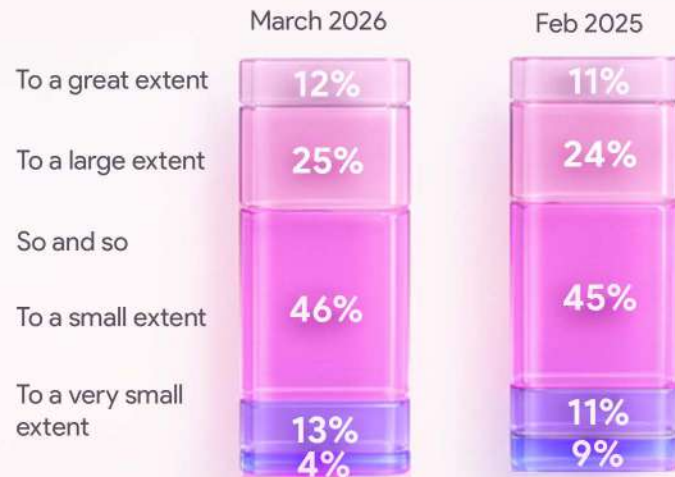
N = 660 (2026) / 651 (2025), respondents who have seen advertising in the mall

Q: Do you happen to purchase a product as a result of advertising you saw in the mall?



N = 806 (2026) / 803 (2025), all respondents

Q: To what extent do you think that the advertising displayed in the mall is useful?



Mall advertising demonstrates a strong ability to drive action, with 64% of visitors stating they have purchased a product as a result of exposure, an increase vs. last year. This confirms the mall as a high-conversion environment, where proximity to retail and repeated exposure effectively translate awareness into purchase, especially among frequent visitors.

**37%**  
Great/large extent

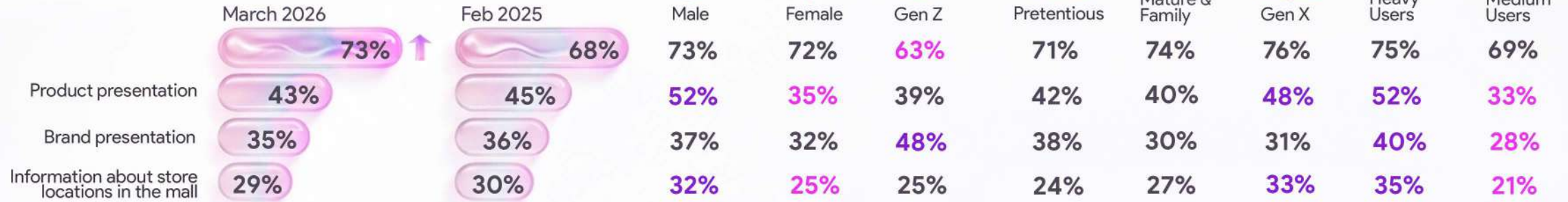


Over one-third of consumers (37%) consider mall advertising useful to a great or large extent, with even higher relevance among heavy users. While perceptions remain moderate overall, this indicates that well-targeted and contextually relevant campaigns can significantly enhance effectiveness, reinforcing the importance of creative quality and strategic placement in driving both relevance and impact.

# Relevance of mall advertising and purchase intention

N = 806 (2026) / 803 (2025), all respondents

Q: What information would you like to see in the advertising displayed in the mall to help improve your shopping experience?



Q: To what extent do you think that in the future you would buy the products presented in the advertising displayed in the mall?



**57%**  
Definitely / probably buy



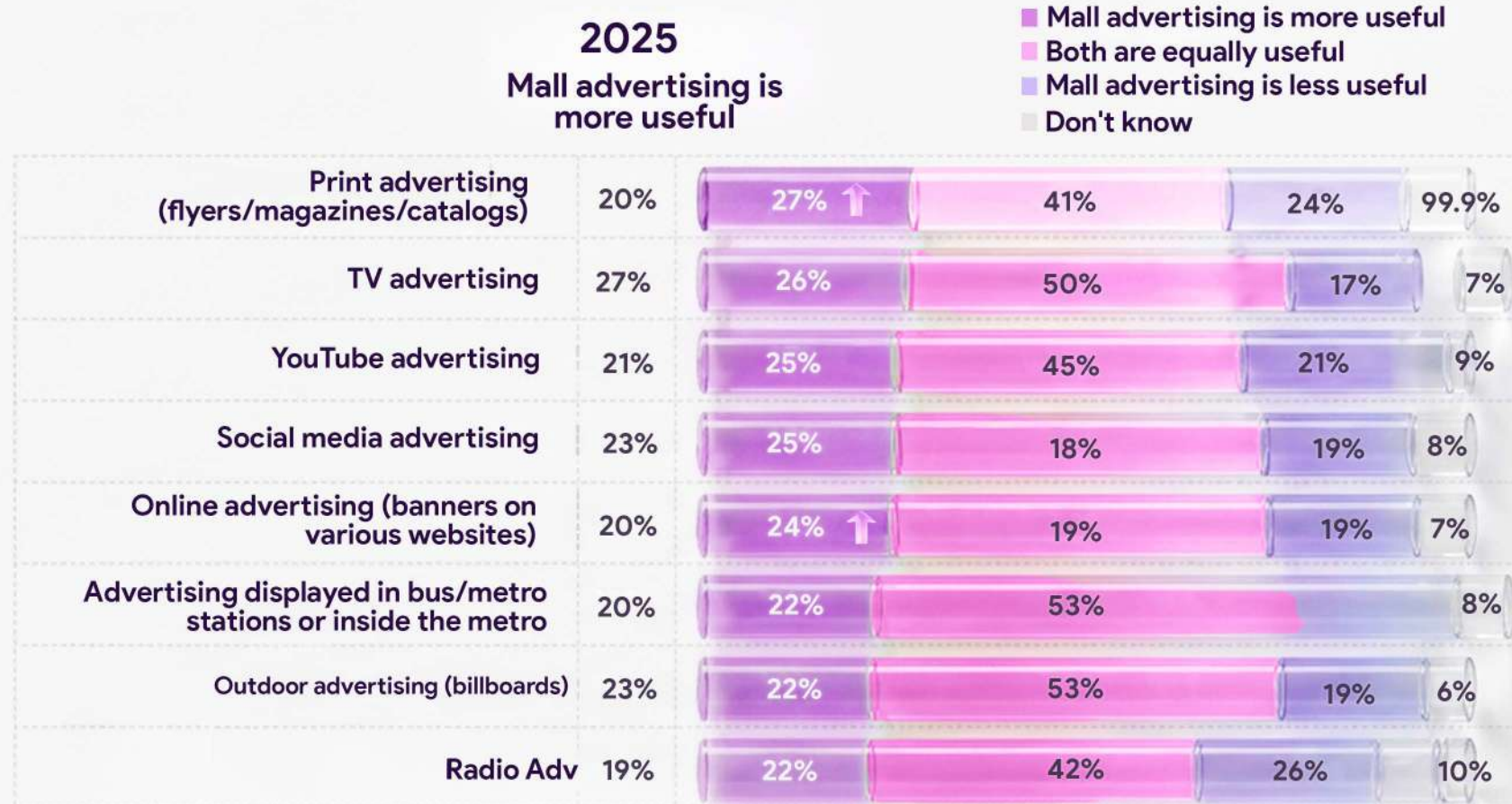
Consumers clearly prioritize offers and promotions (73%), reinforcing the importance of value-driven messaging in mall environments, while product and brand presentations play a secondary but still meaningful role. This indicates that the most effective campaigns are those that combine clear incentives with engaging presentation, aligning with shoppers' expectations for both inspiration and tangible benefits.

Mall advertising continues to show strong persuasive power, with 57% of visitors stating they would definitely or probably buy products seen in ads. This highlights the mall as a high-intent environment, where consumers are not only receptive but also open to future purchase decisions, especially when messaging is relevant, timely, and closely linked to in-mall retail opportunities.

# Usefulness of mall advertising compared to other channels

N = 806 (2026) / 803 (2025), all respondents

Q: To what extent do you think that the advertising displayed in the mall is more useful than each of the following types of advertising?



Mall advertising is perceived as at least equally or more useful than other channels across the board, with particularly strong gains versus print and online formats, highlighting its growing relevance in a cluttered media landscape.

While parity remains high with channels like TV and social media, **the results indicate that the contextual proximity to purchase and real-world presence of mall advertising enhances its perceived utility**, positioning it as a complementary channel that can reinforce and amplify the **effectiveness** of broader media campaigns.

# Physical interaction with the product before online purchases

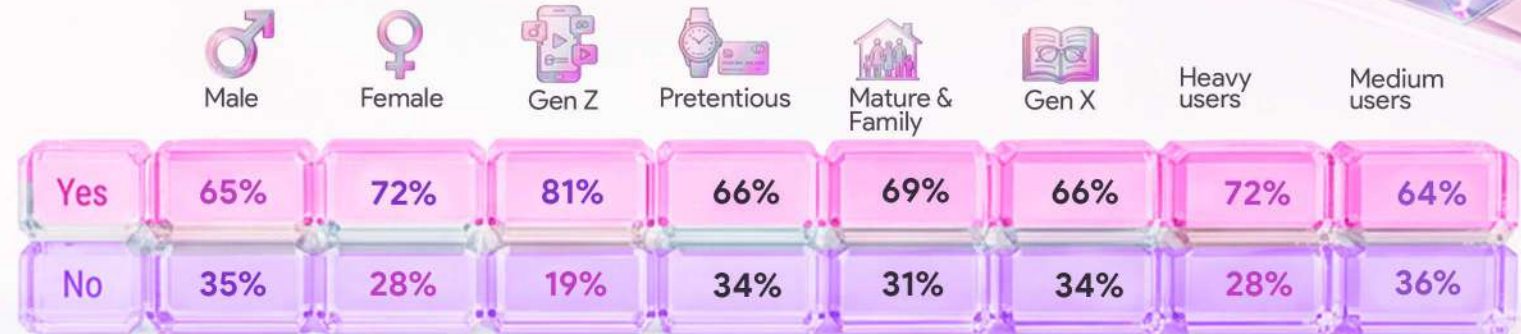
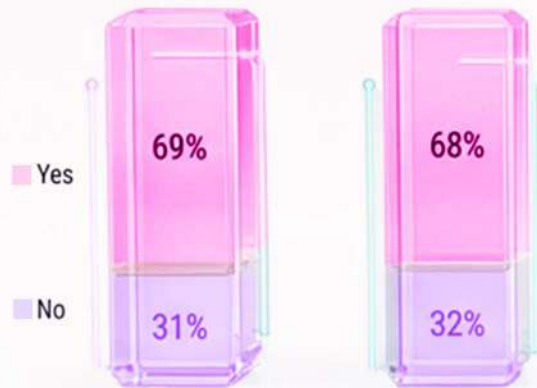
N = 806 (2026) / 803 (2025), all respondents

Q: Before shopping online, do you have the habit of going and trying the products or seeing them physically in stores?



March 2026

Feb 2025



A strong majority of consumers (69%) prefer to physically see or try products in-store before purchasing online, confirming the continued **importance of malls in the omnichannel journey**. This behavior highlights malls as key **validation touchpoints**, where **brands can influence consideration and confidence ahead of digital conversion**, reinforcing the value of impactful, informative, and experience-driven indoor campaigns.

# Preference for online vs. in-store purchase

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N = 806 (2026) / 803 (2025), all respondents

Q: Thinking about the purchases made online in relation to those made in physical stores, which of the following categories of products do you buy more online?

	Online Shopping	Shopping in store	2025 Shopping in store	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy Users	Medium Users
Food (Hypermarket)	24%	76% ↓	81%	77%	74%	71%	73%	73%	81%	74%	77%
Accessories (Jewellery, Glasses, Underwear)	36%	64%	68%	66%	63%	57%	57%	64%	71%	63%	67%
Men's Clothing	36%	64%	68%	63%	66%	60%	59%	61%	70%	63%	65%
Travel Bags / Trolleys	36%	64%	66%	66%	62%	58%	58%	65%	68%	63%	65%
Home & Decoration	38%	62% ↓	67%	64%	60%	59%	56%	61%	66%	61%	63%
Children's Clothing	38%	62%	64%	64%	60%	62%	52%	59%	68%	61%	63%
Sporting Goods	39%	61%	65%	61%	61%	58%	57%	58%	66%	61%	61%
Women's Clothing	39%	60%	65%	63%	58%	55%	55%	59%	66%	60%	61%
Shoes / Bags	40%	60% ↓	67%	61%	59%	54%	53%	60%	66%	60%	60%
Cosmetics / Perfumes	43%	57% ↓	63%	57%	57%	52%	51%	56%	62%	62%	57%
Books / Stationery	45%	55%	58%	58%	53%	54%	51%	55%	58%	56%	55%
Games & Toys	45%	55%	58%	56%	54%	46%	48%	56%	61%	66%	54%
Electronics & IT	49%	51% ↓	58%	49%	52%	52%	46%	52%	51%	51%	51%

Despite the growth of online shopping, in-store purchasing remains dominant across most categories, particularly for everyday goods like food and for products where physical evaluation matters (e.g., clothing, accessories). While online channels gain relevance in categories like electronics and books, the results confirm that malls continue to play a critical role in the purchase journey, especially for categories driven by experience, fit, and immediacy, reinforcing their importance as both transactional and influence environments.

# Hypermarket preference

N = 806 (2026) / 803 (2025), all respondents

Q: But if you decide to go to the hypermarket, what is the time you are willing to allocate for traveling to the hypermarket?



Consumers are increasingly willing to allocate more time to reach a hypermarket (37 vs. 28 minutes), suggesting a growing openness toward destination shopping, likely driven by the appeal of larger formats, wider assortments, and integrated mall experiences.

March 2026    Feb 2025



	Male	Female	Gen Z	Pretentious	Mature & Family	Gen X	Heavy Users	Medium Users
I prefer to go to the hypermarket in the mall	43%	39%	43%	44%	43%	38%	51%	29%
I prefer to go to the hypermarket close to home	57%	61%	57%	56%	57%	62%	41%	29%







Despite this, proximity remains the key driver, with most consumers still preferring hypermarkets closer to home (59%). This highlights a balance between convenience and experience, where malls can compete effectively when they offer added value beyond routine shopping.

# Preferred hypermarket

N = 806 (2026) all respondents

Q: And which is your favourite hypermarket?

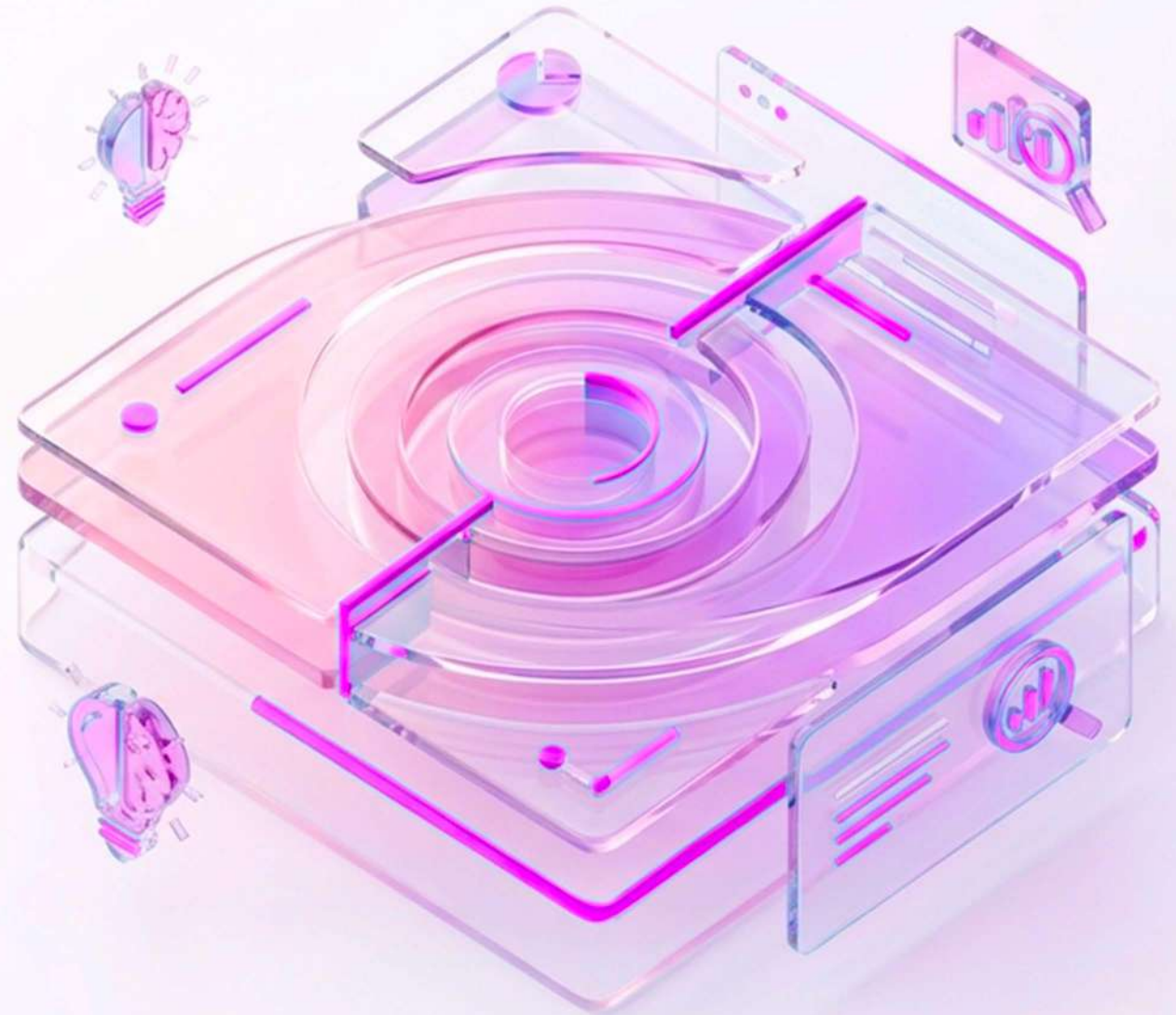
March 2026

		 Male	 Female	 Gen Z	 Pretentious	 Mature & Family	 Gen X	Heavy Users	Medium Users
Lidl	31%	30%	31%	46%	32%	28%	25%	27%	35%
Kaufland	27%	25%	28%	22%	26%	25%	30%	24%	30%
Carrefour	23%	25%	22%	17%	19%	24%	27%	26%	20%
Auchan	18%	19%	18%	13%	22%	21%	16%	22%	14%

- Lidl emerges as the leading preferred hypermarket (31%), followed by Kaufland and Carrefour, indicating a strong positioning of value-oriented and accessible retailers within consumers' consideration set.
- The higher preference among younger audiences for Lidl suggests a strong alignment with price sensitivity and convenience-driven shopping behaviors. At the same time, preferences remain relatively fragmented across brands, with each retailer attracting different segments, highlighting the importance of tailored communication strategies.
- For brands, this reinforces the opportunity to leverage indoor advertising across multiple retail environments to maximize reach and effectively target diverse shopper profiles.

# Main Insights

...→



# Main Conclusions(I)

## Shopping malls visiting habits

- 54% of the respondents go to the mall at least once a week.
- On average, respondents are willing to spend 52 minutes for the trip to the mall.
- The average distance travelled to the mall is 9 km. For medium users (those who go at most 2-3 times /month) the average is 11 km, compared to 7 km heavy users.
- The average amount spent at a visit is 383 Lei, slightly higher than in 2025 (370).
- The pretentious segment are spending the highest amount per visit (398 Lei), while Gen Z are spending the lowest amount (349 Lei).  
More than half (55%) of respondents go to the mall using their car. Gen Z respondents are more likely to use public transportation (37%) compared to older visitors.
- Weekends are the preferred time for mall visits (52%), while 16% prefer visiting during the week. 32% say that any day is a good day for a mall visit.  
157 minutes is the average duration of a visit to the mall, higher for Gen Z (177 minutes).

## Motivations and behavior

- Shopping (88%) is the main reason for going to the mall, followed by going to the hypermarket (55%) and visiting the food court (54%). The cinema is a motivation to go to the mall for 45% of the respondents, while 42% are going for socializing and coffee.
- Gen X (62%) are more likely to go to the mall for the hypermarket, while Gen Z for the food courts (63%).



# Main Conclusions(II)

## Motivations and behavior

- The most frequently purchased products are food items from the hypermarket (72%), followed by women's clothing (60%) and men's clothing (59%).
- Men are more likely go to the mall to buy sporting goods (53%) and electronics (53%) while women are more interested in cosmetics / perfumes (69%) or home & deco (43%).

## Advertising at the mall

- 4 out of 5 respondents remember seeing advertising at the mall. The most noticed types of advertising are illuminated panels (62%) and digital screens (60%).
- As for the advertising content that is remembered, 72% recall the brands, 67% the offers / promotions presented and 39% the products. 30% remember the prices.
- 64% have bought products as a result of seeing the advertising in the mall. Heavy users (73%) are most likely to be influenced by advertising in malls.
- 37% of respondents think that advertising in malls is useful, a view that is taken especially by the Heavy users (46%).
- In terms of preferred advertising content, 73% would like to see presentation of offers and promotions 43% are interested in product presentations and 35% want to find out more about brands. 30% want to see information about the store locations.
- 57% percent of the respondents believe they would buy products as a result of seeing advertising in the mall, especially the Heavy users (64%) and men (60%).



# Main Conclusions(III)



## Online vs brick-and-mortar stores

- Two thirds of respondents (69%) go to a store to see the product before buying it online. The percentage reaches 81% for Gen Z.
- As for preferred retail channels for various product categories, food (76%) is the most likely to be bought in a store rather than online (24%). Men's clothing (64%), accessories (64%) and other categories are also more likely to be purchased in a store. At the other end, only 51% of the respondents prefer to buy electronics & IT product

## Hypermarket preferences

- 37 minutes is the average time respondents are willing to spend going to the hypermarket.
- As for the location of the hypermarket, 41% of the respondents prefer the hypermarket at the mall while 59% would go at the hypermarket close to home. Heavy users (51%) are more likely to prefer the hypermarket at the mall.
- Lidl is the favourite hypermarket of 31% of the respondents, followed by Kaufland (27%) and Carrefour (23%).

# Recommendations

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## Optimizing In-Mall Advertising Content

**Mall seems to be increasingly effective: 64% of visitors made a purchase after seeing an in-mall ad, up from 60% the previous year. In a context of economic pressure, 73% of respondents want to see promotions in mall ads, up from 68% last year.**

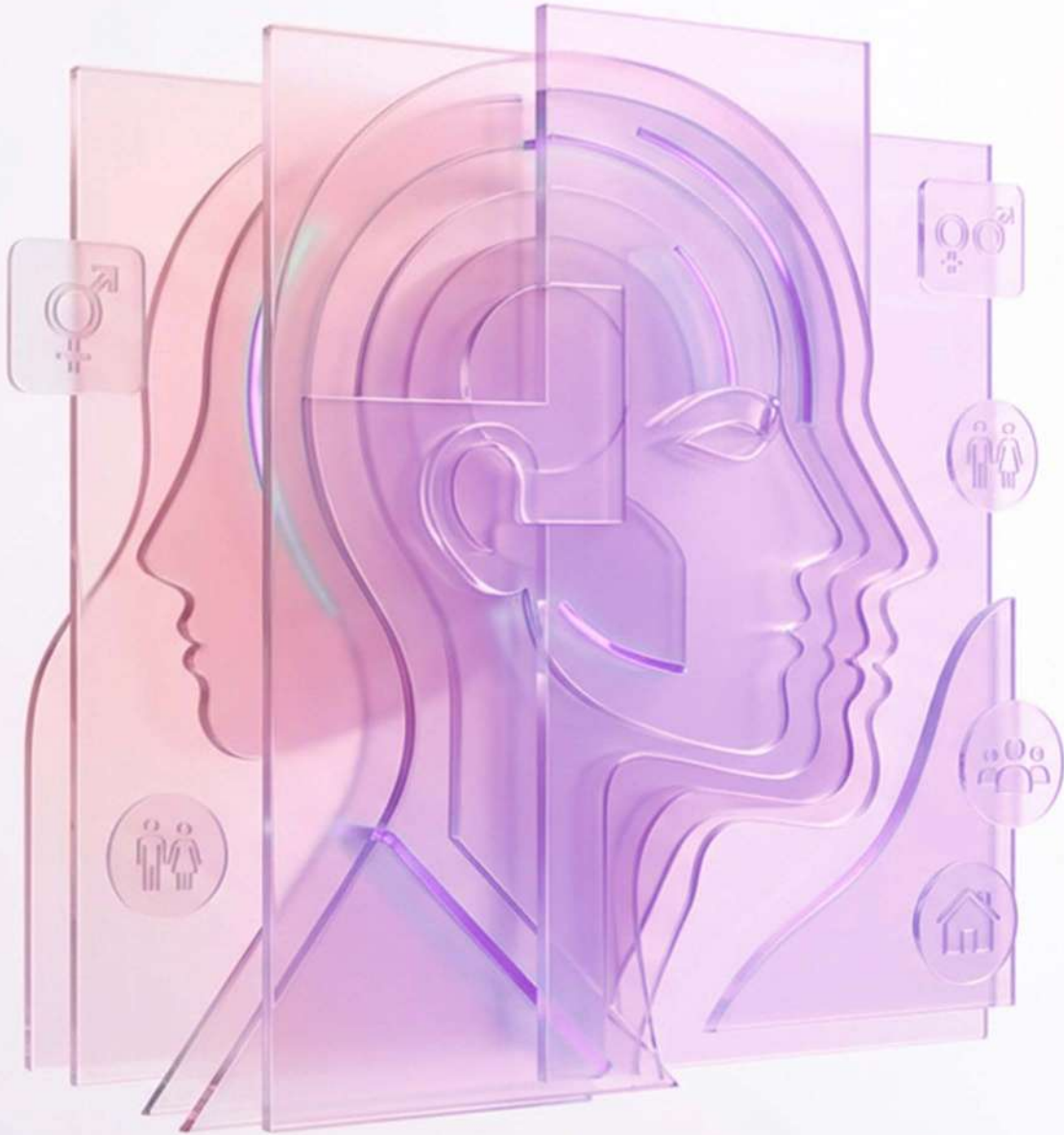
- Focus on promotional messaging.
- Ensure advertised deals are immediately visible in-store.
- Use high-visibility formats (illuminated panels, digital screens) that give shoppers a reason to engage more with mall advertising.

## Physical Experience as a Competitive Advantage

**As online purchasing grows across categories, malls need to emphasize what digital retail cannot offer. The data already points in this direction: visitors spend an average of 157 minutes at the mall, not just to shop, but to socialize, eat, and at the cinema. These are the malls' strongest assets.**

- Invest in the experiences that make the visit itself the destination - live events, seasonal activations, and food & entertainment offers that create reasons to visit the mall beyond pure shopping.
- Emphasize what the experience cannot replicate as the reason to keep visiting the mall.





# Sample profile

*Demographic characteristics*

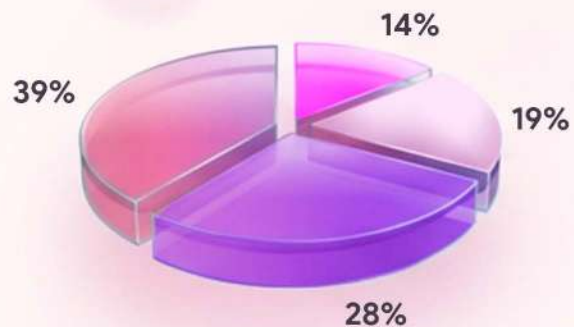


# SAMPLE PROFILE

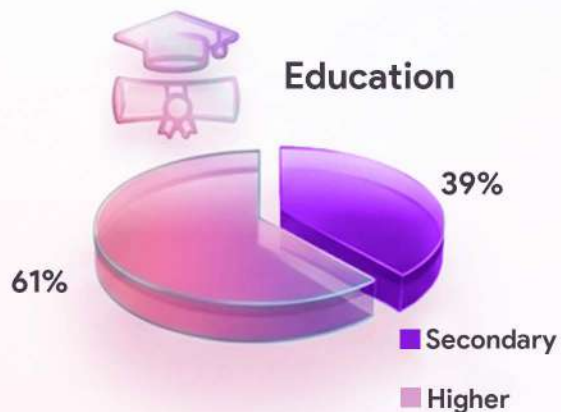
N = 806 respondents



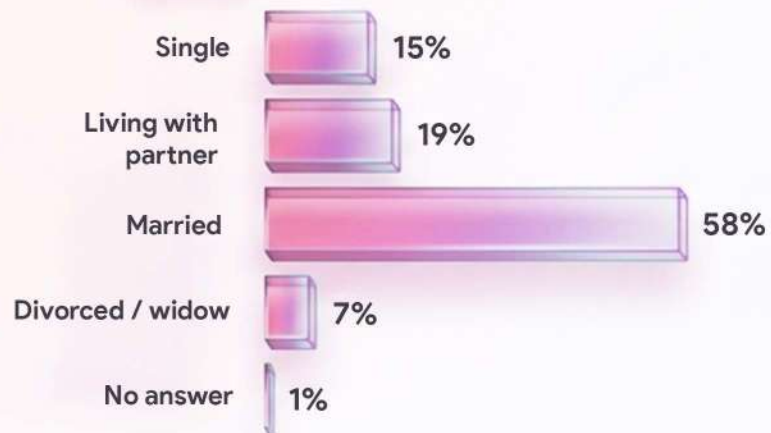
## AGE



- Generation Z (18 - 25 y.o.)
- Pretentious (26 - 35 y.o.)
- Mature & Family (36 - 45 y.o.)
- Generation X (46+ y.o.)



## Marital status



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## Personal income



## Household income



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THE MALL EFFECT INDEX

[themalleffect.ro](http://themalleffect.ro)