FIFTH EDITION

Connected Shoppers Report

Insights and trends from 2,400 shoppers and 1,125 retail industry decision makers worldwide.

What You'll Find in This Report

For the fifth edition of the Connected Shoppers Report, Salesforce surveyed 2,400 shoppers and 1,125 retail industry decision makers to learn more about:

- How digital tools are changing physical experiences
- The changing role of brick-and-mortar stores
- How retailers are using – and plan to use – data to engage shoppers
- The impact of service on shopper loyalty
- The intersection of loyalty programs and shopper data

Data in this report are from two double-anonymous surveys conducted from May 18 through June 21, 2023. The surveys generated responses from a range of respondents across North America, Europe, South America, and Asia-Pacific. All respondents are third-party panelists. See page 44 for further survey demographics.

Due to rounding, not all percentage totals in this report equal 100%. Comparison calculations are made from total numbers (not rounded numbers).

Salesforce provides data-driven insights to help businesses transform how they drive customer success. Browse all reports at salesforce.com/research.

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Executive Summary

For retailers, the integration of digital and physical shopping means they're connecting with shoppers in more ways than ever before. The good news is that this gives retailers more chances to prove they recognize, understand, and value shoppers. The bad news? Retailers have a short window to impress them before they walk away.

74% of shoppers say it takes no more than three bad experiences to abandon a brand.

To keep up, retailers are racing to find new ways to compete. They see opportunities in customer service, ecommerce, and personalization. The challenge? Achieving their goals requires a heavier reliance on data, insights, and technology – and the retailers that don't keep up risk getting left behind.

01 Digital Elevates Physical Shopping

Shoppers expect seamless experiences on the digital channels of their choice. **Sixty percent of shoppers say they have used their mobile device in a store.**

02 Stores Become Experience Differentiators

Store associates go beyond checkout to help retailers deliver unique experiences. **Associates spend 74% of their time on activities unrelated to checkout.**

03 Intelligent Insights Spark Personalized Engagement

Retailers embrace unified platforms to enable personalization. **Sixty percent of retailers are in the strategy or execution phase of their unified shopper engagement platform journey.**

04 Excellent Customer Service is Table Stakes for Shoppers

Bad customer service undermines loyalty. **Seventy-four percent of shoppers say it takes no more than three bad experiences for them to abandon a brand.**

05 Retailers See Increasing Value in Loyalty Program Data

Retailers use loyalty programs to encourage repeat business. **Fifty-seven percent of retailers cite customer retention as a top loyalty program goal.**

Introduction

More competitors. Higher costs. Supply chain snags. For retailers, these are just some of the challenges pressuring margins. But in this uncertain economy, can retailers clear these hurdles and satisfy shoppers, too?

Retailers believe the answer is yes if they can humanize increasingly digital experiences. They see opportunities to build loyalty and grow share of wallet through customer service, ecommerce, and marketing. But, to accomplish their goals, they must keep up with shoppers' changing behaviors and rising expectations.

Here, we explore the trends, challenges, and opportunities that are shaping the retail industry.

Margins Remain Under Pressure, But Opportunities Exist to Earn and Maintain Loyalty

Top Retail Industry Challenges

1. Increased competition
2. Shipping costs
3. Supply chain difficulties
4. Changing customer expectations/behaviors
5. Inventory management

Top Retail Industry Opportunities

1. Improving customer service
2. Growing ecommerce
3. Improving personalization
4. Improving efficiency
5. Increasing store associate productivity

1

Digital Elevates Physical Shopping

01

Shoppers Traverse Physical and Digital Channels

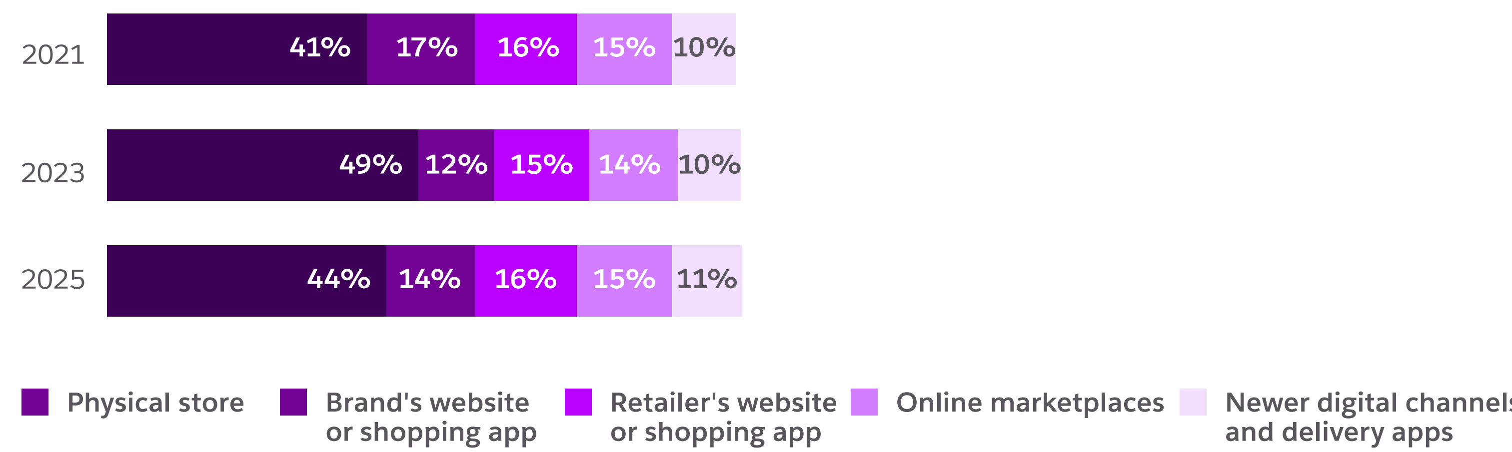
After the digital surge in the heart of the pandemic, people are now shopping online and in stores at nearly the same rate. While shoppers split their purchases nearly evenly between stores and online in 2023, in two years, shoppers expect they'll complete only 44% of transactions in the store.

In 2023, shoppers say they made 49% of transactions in physical stores.

Where will they go instead? In addition to websites, apps, and online marketplaces, shoppers will continue to test newer digital channels – like social media and voice assistants – for inspiration and buying.

The Future of Ecommerce is Bright

Estimated Volume of Purchases Across the Following Channels



01

Shoppers Expect Brands to Meet Them at the Edge

More than ever, shoppers expect retailers to meet them where they regularly engage, including social media, messaging apps, and live streaming services. This is known as “shopping at the edge,” where shoppers start – and increasingly complete – a buying journey outside of a retailer’s physical and digital space.

Today, this journey often starts on social media, where 50% of shoppers say they discover new products. In a major shift, the share of shoppers who actually buy on social media has nearly quadrupled in only two years.

59% of shoppers say they have completed a transaction on social media, up from 15% in 2021.

Completing purchases over messaging apps – like WeChat and Facebook Messenger – also skyrocketed. Thirty-six percent of shoppers said they’d bought this way, up from 11% in 2021 – an increase of 227%.

Shoppers Increasingly Discover, Buy, and Get Service Outside of a Retailer's Physical and Digital Space

Discovery

- 50% Social media
- 22% Influencers
- 14% Messaging app
- 11% Live-stream video
- 8% Video or live chat

Service

- 31% Chat*
- 18% Social media
- 18% Messaging app
- 18% Video or live chat
- 17% SMS / text

Buying

- 59% Social media
- 36% Messaging app
- 24% Voice assistants
- 21% Live-stream video
- 20% Chat*

* Chatbots, chat, or instant messaging

01

Digital Tools Augment Store Experiences

Digital pervades the physical store experience for shoppers: 60% of shoppers say they have used their mobile devices in stores for use cases like researching and price-comparing products, scanning a QR code, or checking out with scan-and-go. Shoppers also interact with associates who use mobile devices to see if a product is in stock, complete a transaction, or answer a question.

Shoppers Rely on Mobile Tech in Stores

Most Common Self-Serve Mobile Experiences in Stores, Ranked

1. Researched a product online using a mobile device while in a store
2. Scanned a QR code
3. Completed an in-store purchase using a store's app on my mobile device while in store (i.e., scan-and-go)

Mobile Enhances Store Associates' Productivity

Most Common Associate-Assisted Mobile Experiences in Stores, Ranked

1. Located inventory in another store or online for me to purchase and / or be delivered
2. Helped me check out using a mobile device
3. Accessed my information (e.g., my shopping history, my preferences, my loyalty info)

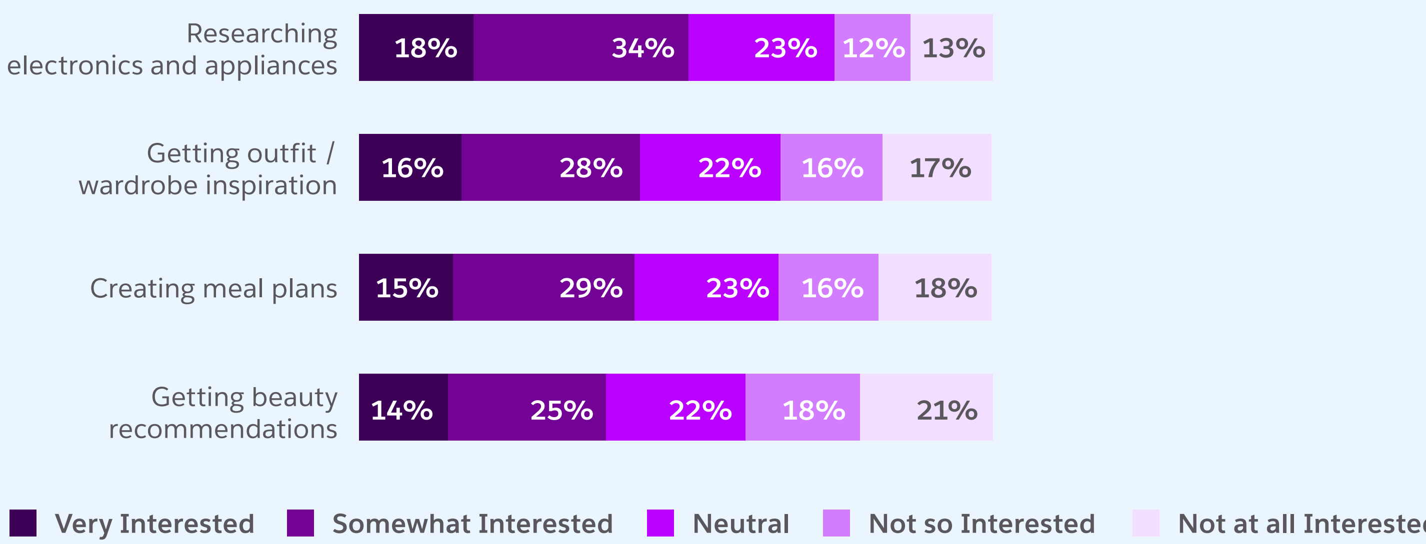
Spotlight: Shoppers See Possibilities in Generative AI

Generative artificial intelligence (AI), the type of AI that creates new content from existing data, is changing the way shoppers shop. How? They are interested in generative AI to help them research products, get recommendations, and find inspiration across a wide range of product categories.

17% of shoppers say they've used generative AI to get inspiration for product purchases.

Shoppers Show Interest in Generative AI

Interest Among Shoppers in the Following Generative AI Use Cases



Spotlight: Retailers Believe Generative AI Can Streamline and Personalize Buying Experiences

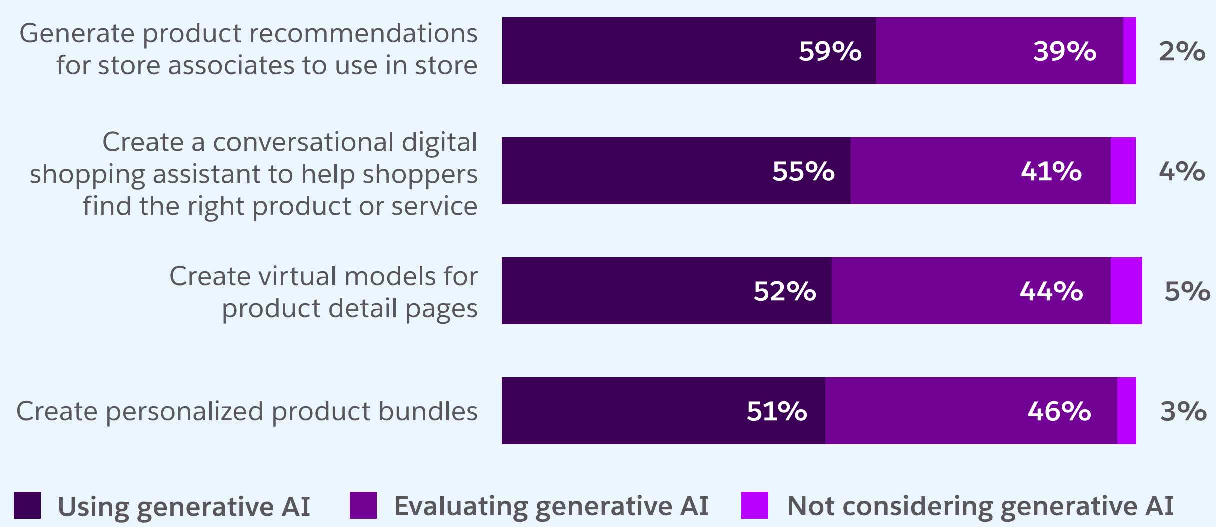
Meanwhile, retailers see the promise of generative AI when it comes to creating smoother, more personalized interactions. How? By curating offers and enhancing digital experiences, online and in the store.

92% of retailers say they are investing in AI more than ever to improve shopping experiences.

Although it's not yet clear if retailers are actually implementing generative AI in their workflows, or still experimenting, 59% of retailers say they are already using it to help store associates make product recommendations to shoppers. And when it comes to online experiences, 55% are exploring or using it to create a conversational digital assistant to help online shoppers find products.

Retailers Explore Generative AI's Commerce Applications

Use of the Following Commerce Use Cases for Generative AI



Base: Respondents in customer experience, ecommerce/digital strategy, IT, or marketing roles.

2

Stores Become Experience Differentiators

02 Retailers Elevate Store Experiences

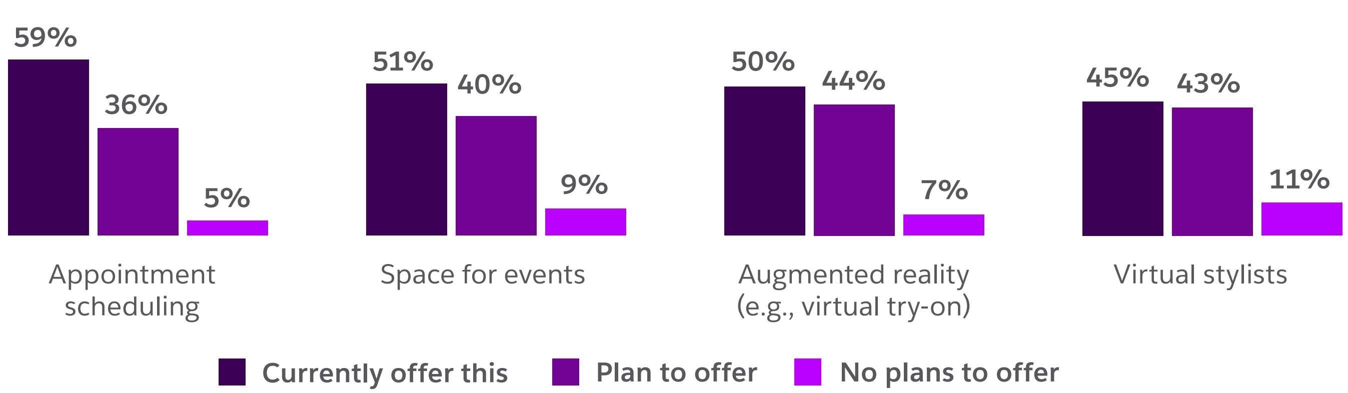
Physical Shopping Delivers Instant Impact

Top Reasons to Shop in a Physical Store

1. To get merchandise immediately
2. To touch and feel the merchandise
3. To avoid shipping fees for purchases
4. To take advantage of in-store discounts
5. To enjoy the shopping experience

Retailers Level Up Store Services

Retailers Plan to Implement Value-Added Services

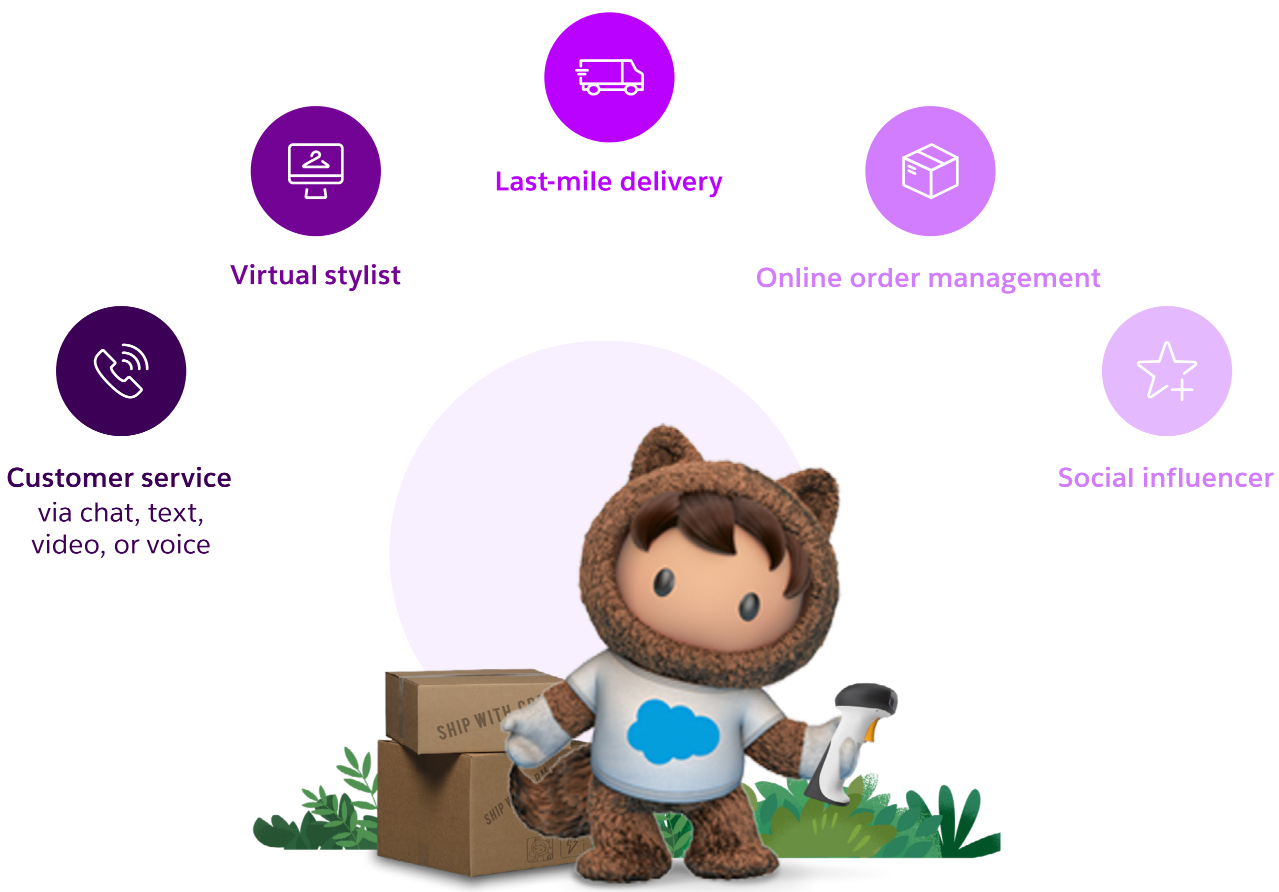


Digital transactions are on the rise, but brick-and-mortar stores remain critical to driving shopper engagement. Retailers are adapting and optimizing the store to remove friction for shoppers and delivering experiences that will set them apart from competitors.

Today, many retailers that carry highly-considered or technical merchandise already deliver high-touch service, reminding shoppers about the benefits of going to a store in person. Retailers are exploring additional services and experiences that differentiate their store experiences from the competition. From personal shopping to holding blowout events with exclusive products and deals, these encounters build loyalty by helping customers feel recognized, understood, and appreciated.

02

Store Associates Take on More Responsibilities



As the strategic role of brick-and-mortar stores changes, so do the responsibilities of the associates who work there. Today, store associates increasingly take on work that goes far beyond checkout and bagging.

Retail store associates spend 74% of their time on activities unrelated to checkout.

Posting on social media, meeting with shoppers for virtual styling appointments, handling customer service inquiries, fulfilling online orders, and last-mile delivery service have become part and parcel of store associates’ job descriptions.

02

Retailers Equip Associates with Mobile Devices

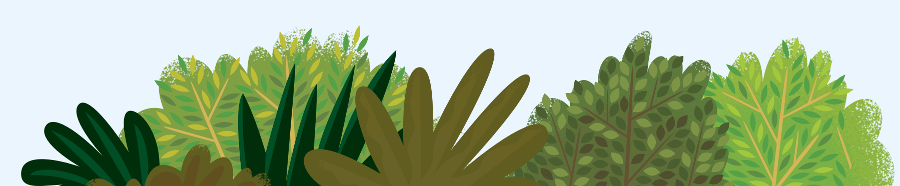
Store Associates Use Mobile Devices Beyond the Cash Wrap

Store Associates' Mobile Device Tasks

Base: IT and retail/store operations respondents at companies where store associates use mobile devices.

With frontline workers in the store responsible for a growing number of tasks, nearly one-quarter of retailers say that improving associate productivity is a top opportunity. For retailers, equipping associates with mobile devices to engage shoppers, complete operations tasks, and conduct transactions has become a priority. Today, an estimated 32% of store associates use a mobile device for their job, a share expected to grow to 41% in three years.

The top use cases for mobile devices are to help shoppers sign up for a loyalty program and provide customer service. However, it is still complex for a store associate to complete their tasks: Store associates must log into an estimated average of 12 systems daily.



02

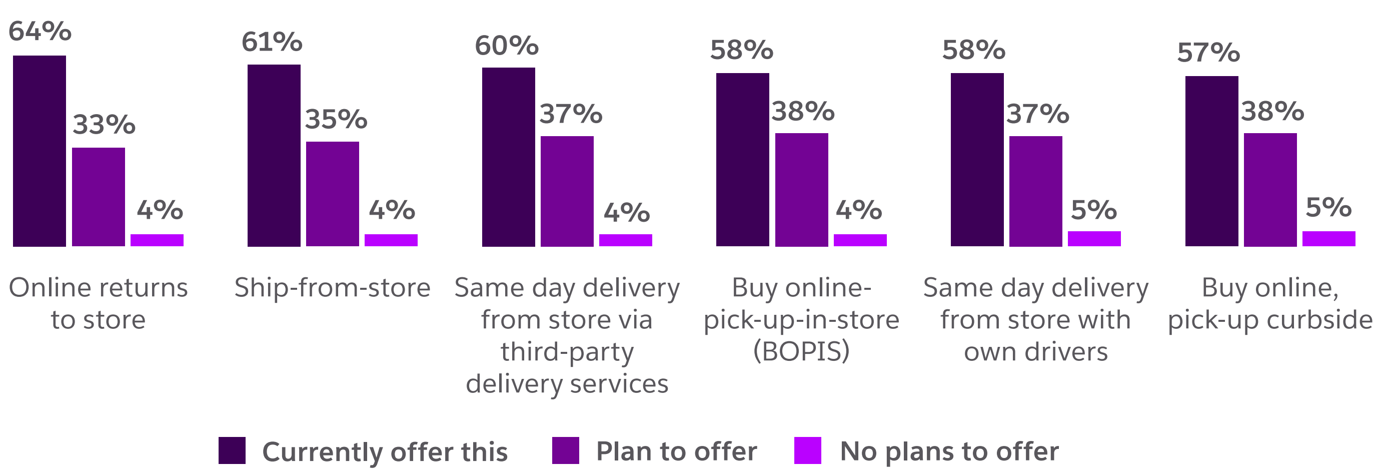
Shoppers Use Stores for Fulfillment

Shoppers Take Advantage of Convenient Fulfillment Options

Shoppers Who Have Completed the Following Fulfillment Activities

Retailers Use Stores as Fulfillment Centers

Retailers' Plans to Implement Store Fulfillment Capabilities

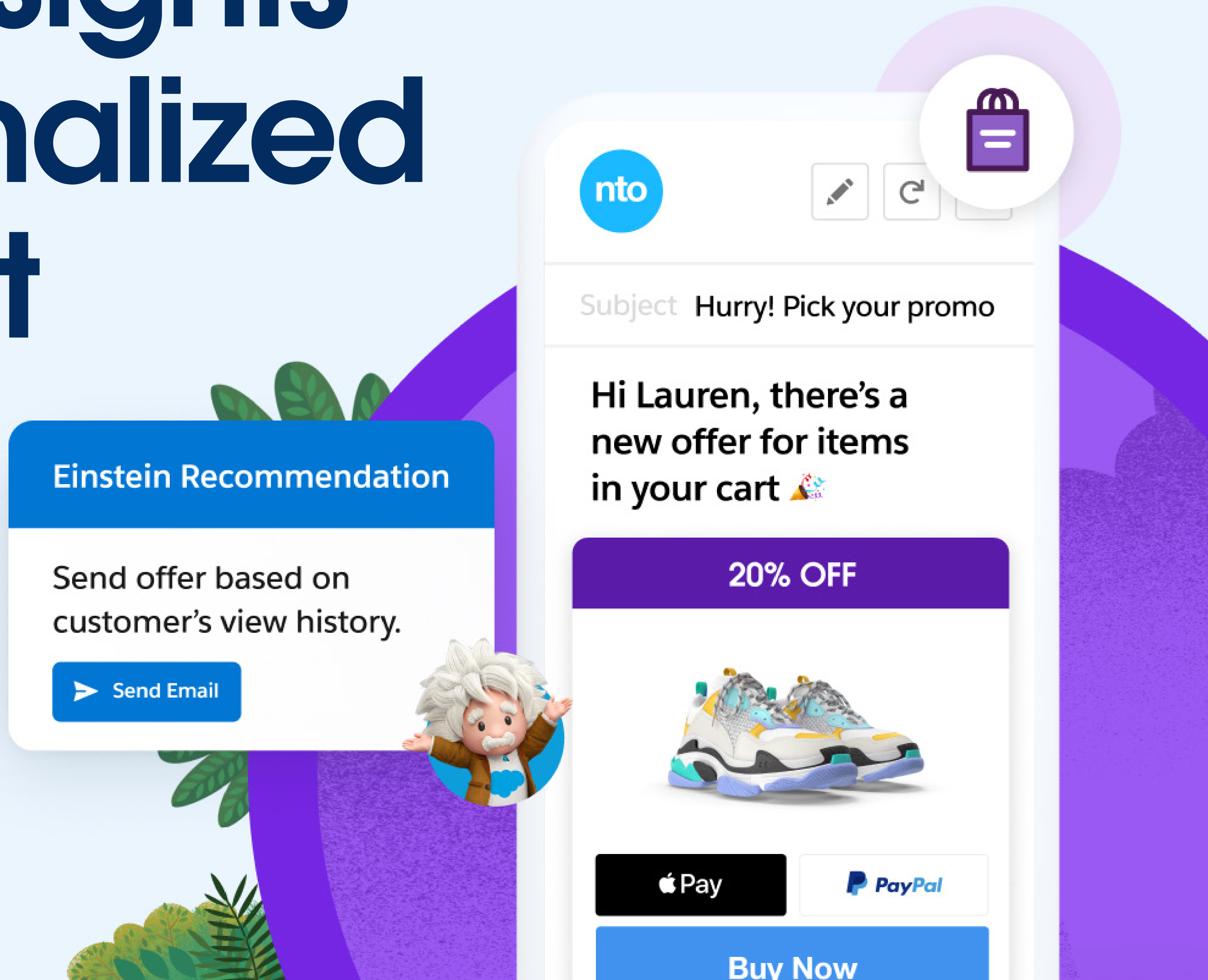


Shoppers are using stores as fulfillment centers. Fifty-seven percent purchased a product online to pick up in-store and 53% went to a store to return a product. The number of shoppers who returned a product in a store grew by 13% since 2021.

Retailers are responding: In 2023, 64% of retailers offer in-store returns of online purchases and 58% offer buy online, pick up in-store.

3

Intelligent Insights Spark Personalized Engagement



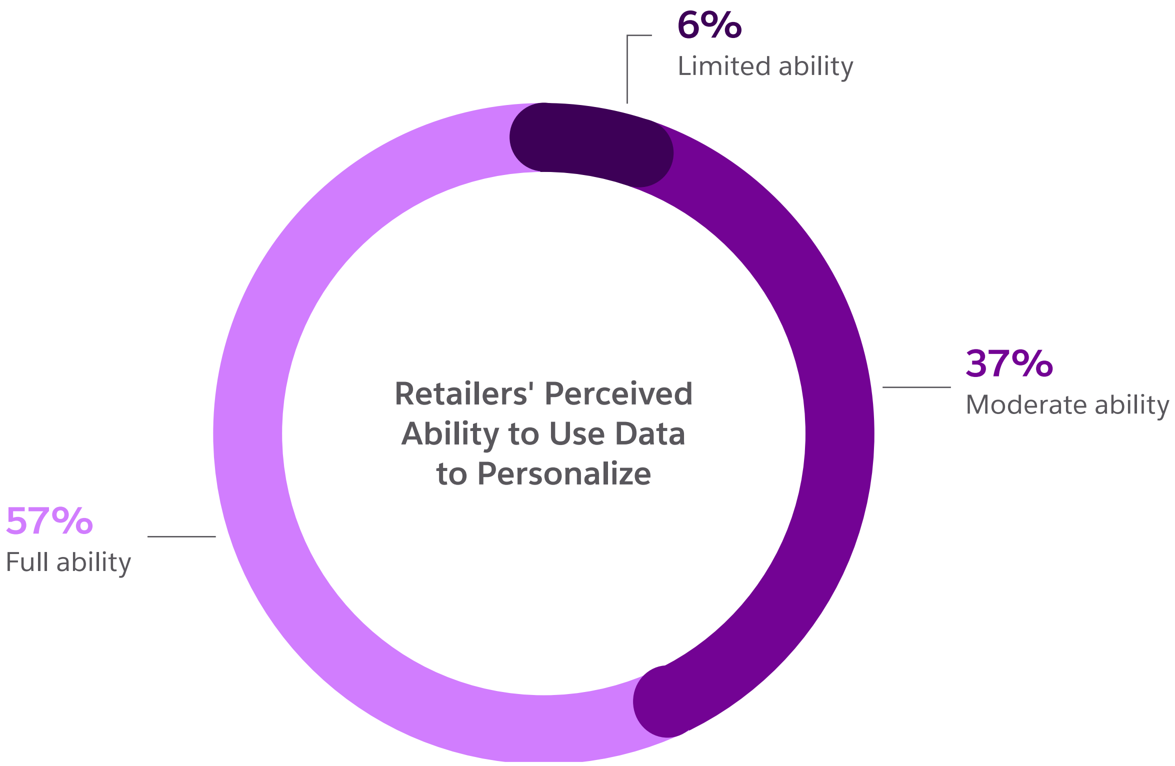
03

Shoppers and Retailers Prioritize Personalization

Retailers say the ability to personalize customer communications is a top priority. It's easy to see why: Nearly three-quarters of customers expect companies to understand their unique needs and expectations.* To break through the noise – where one-size-fits-all communications aren't enough to attract attention – 93% of retailers say they are investing in personalization more than ever before.

Retailers have made significant strides in this area. In two years, the percentage of retailers that claim a full ability to use customer data to personalize shopper engagement has nearly doubled from 32% in 2021 to 57% in 2023.

Retailers Are Activating Data to Enable Personalization



*Source: State of the Connected Customer, Fifth Edition, Salesforce, May 2022.

03

Retailers Embrace the Benefits of Unified Platforms

Retailers are adopting unified engagement platforms to simplify and operationalize data, enabling personalized and seamless experiences across touchpoints. In fact, 60% of respondents are in the strategy or execution phase of their initiatives, while another 11% are already realizing the benefits. Some retailers still have work to do, however: 59% of respondents say that marketing, ecommerce, and service functions are managed through separate systems or applications.

83% of shoppers are more loyal to companies that deliver consistent interactions across departments.*

The disconnect is clear to shoppers: Nearly two-thirds say it feels like they're communicating with separate departments instead of one company,* putting customer retention and loyalty at risk.

*Source: State of the Connected Customer, Fifth Edition, Salesforce, May 2022.

Retailers See ROI from a Unified Platform...

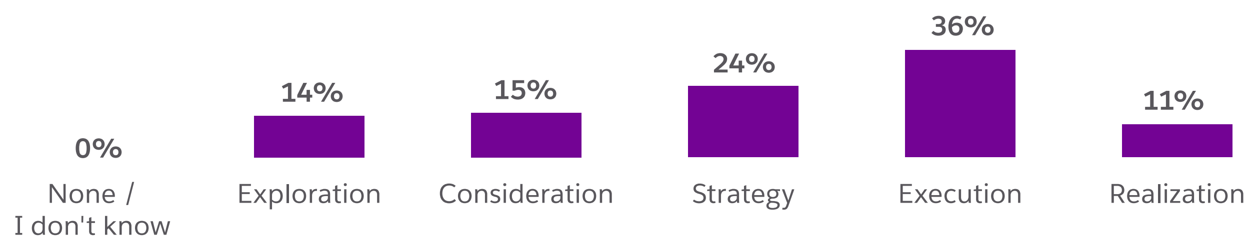
Top Benefits of Unified Engagement Platform

1. Improved personalization
2. Simplified data management and access
3. Improved store associate productivity
4. Better ability to open new stores
5. More data-driven decision making

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

...And Many Retailers Are on the Path

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives



SPOTLIGHT: Generative AI Is Changing Marketing

Retailers say spending is likely to rise on digital channels like social media, video, and influencers. On top of this, generative AI appears poised to help marketers attract the attention of shoppers more efficiently.

Retailers see possibilities for generative AI when it comes to jumpstarting content creation for channels such as display ads, social media, and email. They also believe generative AI will help them automate the development of personalized marketing emails and promotional offers, saving time and money.

Digital Reigns Supreme in Marketing Spend

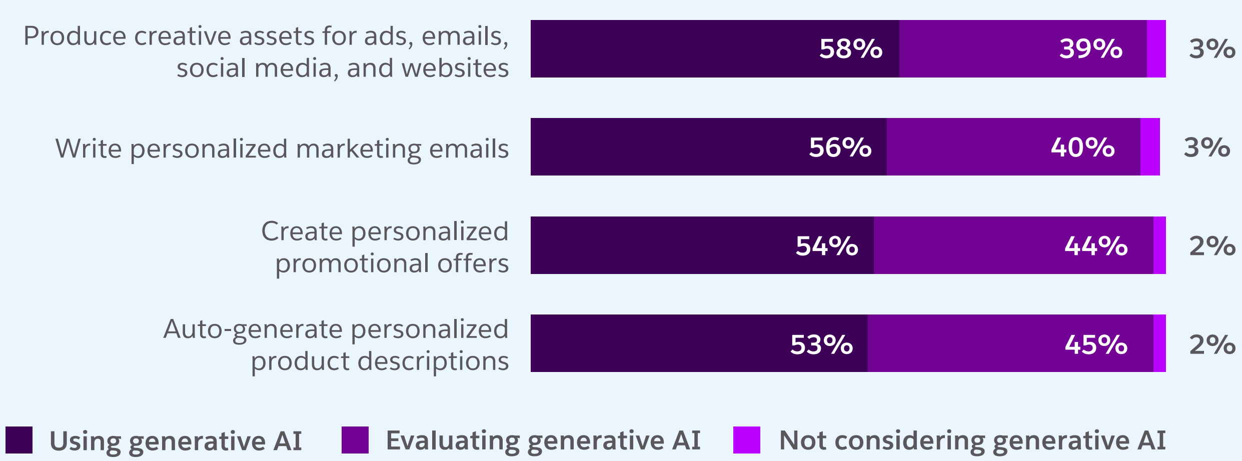
Top Five Marketing Channels with Increased Investment Plans

1. Social media
2. Video ads (on social media, webinars, etc.)
3. Influencer marketing
4. Streaming/podcast ads
5. Affiliate marketing *tied with* search engine marketing

Base: Respondents in customer experience, ecommerce/digital strategy, or marketing roles.

Retail Marketers Embrace Generative AI

Retailers' Use of the Following Generative AI Use Cases



Base: Respondents in customer experience, e-commerce, digital/omnichannel strategy, IT, and marketing roles.

4

Excellent Customer Service is Table Stakes for Shoppers

04

Bad Service Erodes Loyalty

Factors that Contribute to a Bad Shopper Experience

Shoppers Who View the Following as Among the Worst Retail Experiences

Great customer service is a hallmark of shoppers' favorite brands and a top reason why they prefer shopping at a given retailer. Nothing sours shoppers on a retailer like bad service: 53% of shoppers say poor customer service is the worst retail experience of all. Even more alarming: Another 74% say they'll abandon a brand after three (or fewer) bad experiences.

One-third of retailers cite improved customer service as a top opportunity.

The bright side is that great customer service turns shoppers into loyal brand advocates. In fact, 94% of shoppers say good customer service makes them more likely to buy again.*

*Source: State of the Connected Customer, Fifth Edition, Salesforce, May 2022.

04

Shoppers Expect Great Service Everywhere

Shoppers Seek Out Practical Perks

Top Factors that Make Shoppers More Likely to Buy from a Brand or Retailer

1. Free shipping
2. Loyalty or rewards program (tie)
2. Simple and/or free returns (tie)
4. Extensive product variety
6. Exclusive shopping events (tie)
6. Sustainable business practices (tie)

Service is the Top Differentiator for Shoppers

Top Features of Shopper's Favorite Brands

1. Provides great customer service
2. Has easy returns process
3. Offers a loyalty program
4. Offers exclusive shopping experiences and/or promotions
5. Caters to my unique needs

Today, practical perks like free shipping, loyalty program membership, and easy or free returns make shoppers more likely to buy from a retailer. However, shoppers may have to adjust to a new reality.

88% of retailers plan to implement stricter returns policies for this holiday season.

How can retailers nurture loyalty when they plan to restrict a key policy that shoppers like? According to shoppers, extensive product variety and access to exclusive events and promotions, among other factors, go a long way.

04

Service Goes Digital, But Voice Still Matters

Retailers Leverage Digital Channels for Service

Customer Service Channels in Use Among Retailers

Source: State of Service, Fifth Edition, Salesforce, September 2022.

Shoppers increasingly turn to digital channels when they have a question or a complaint. In fact, 57% of shoppers prefer to engage companies digitally.* Email, chat, social media, and text are particularly popular among retailers.**

While email has eclipsed voice as the most used channel, service professionals prefer the phone when an issue is especially complex: 81% say the phone is the preferred channel when a shopper has a complicated question.**

*Source: State of the Connected Customer, Fifth Edition, Salesforce, May 2022.

**Source: State of Service, Fifth Edition, Salesforce, September 2022.

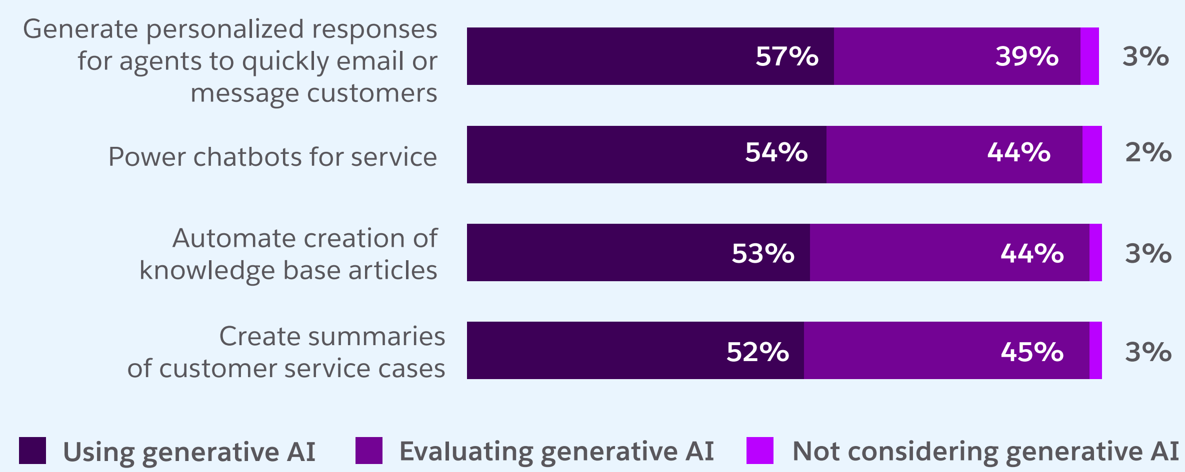
Spotlight: AI Streamlines Service

Rising case volumes are putting pressure on retailers to efficiently scale service. To do this, service organizations are increasingly turning to AI: 88% of service decision makers say their use of AI has increased.*

Generative AI's capabilities hold promise in service. Retailers see possibilities for generative AI in terms of drafting personalized responses to shopper inquiries, leveling up chatbot interactions, and automating the creation of knowledge articles.

Retailers See Possibilities in Generative AI for Service

Retailers' Use of the Following Generative AI Use Cases



Base: Respondents in customer experience, customer service and support, ecommerce/digital strategy, and IT roles.

*Source: State of Service, Fifth Edition, September 2022.

5

Retailers See Increasing Value in Loyalty Program Data

05

Shoppers Get Choosier About Loyalty Programs

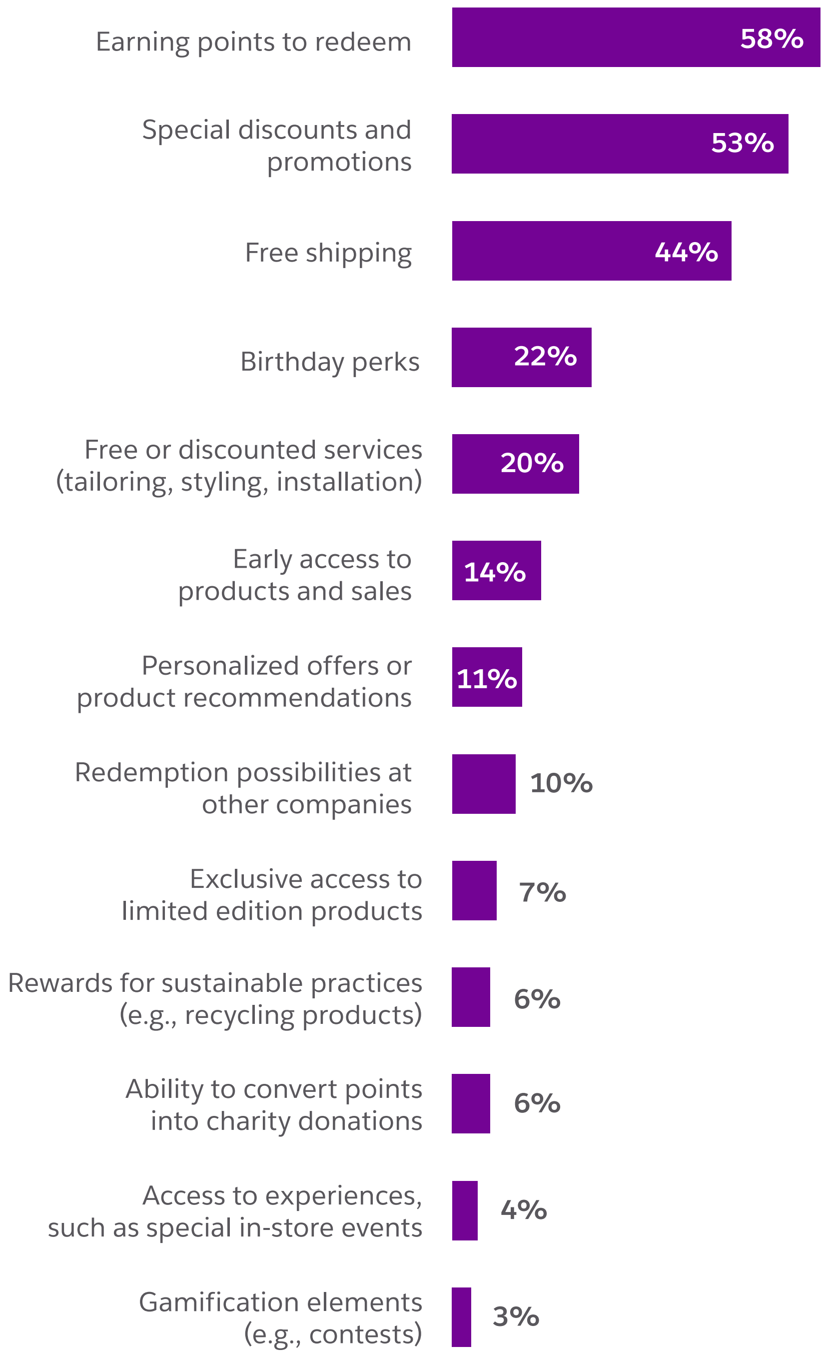
Loyalty program members are often a retailer's most valuable customers because they frequently outspend other shoppers.* The challenge is that simply offering a loyalty program may not be enough to inspire shoppers to join: In 2023, shoppers belong to 3.4 loyalty programs, on average. Nevertheless, for retailers, loyalty programs are often worth the effort: 58% of shoppers say a loyalty program makes them more likely to buy from a brand or retailer.

The number of loyalty programs shoppers belong to has decreased by 21% since 2021.

Source: Paytronix Annual Loyalty Report 2022.

Shoppers See Value in Rewards Programs

What Shoppers Value in Loyalty Programs



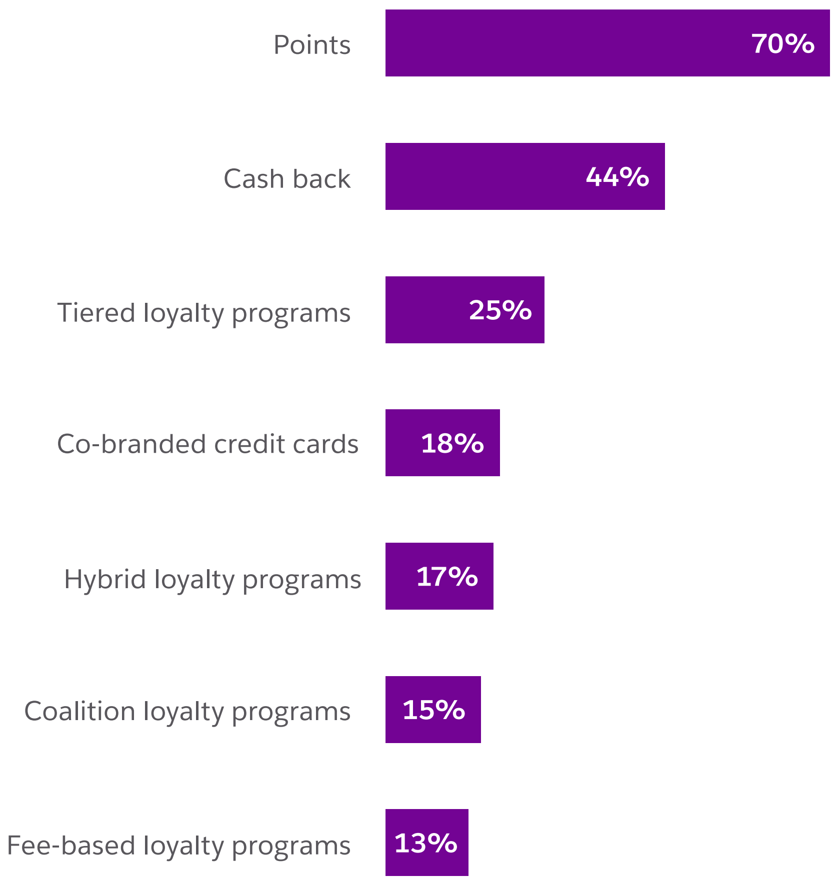
05

Shoppers Value Money-Saving Benefits

What attracts shoppers' attention? With inflation continuing to pressure budgets, shoppers are most likely to belong to programs that offer financial savings. In 2023, the most common programs include benefits like earning points to shop, getting special discounts, and free shipping. Still, retailers interested in stemming the tide of loyalty program defections may look to other differentiated models such as tiered, hybrid, or coalition programs that attract a sizable, if smaller, cohort of shoppers.

Points and Cash Back Are the Most Common Loyalty Programs

Shoppers Who Belong to the Following Loyalty Programs



05

Loyalty Programs Benefit Retailers, But Obstacles Remain

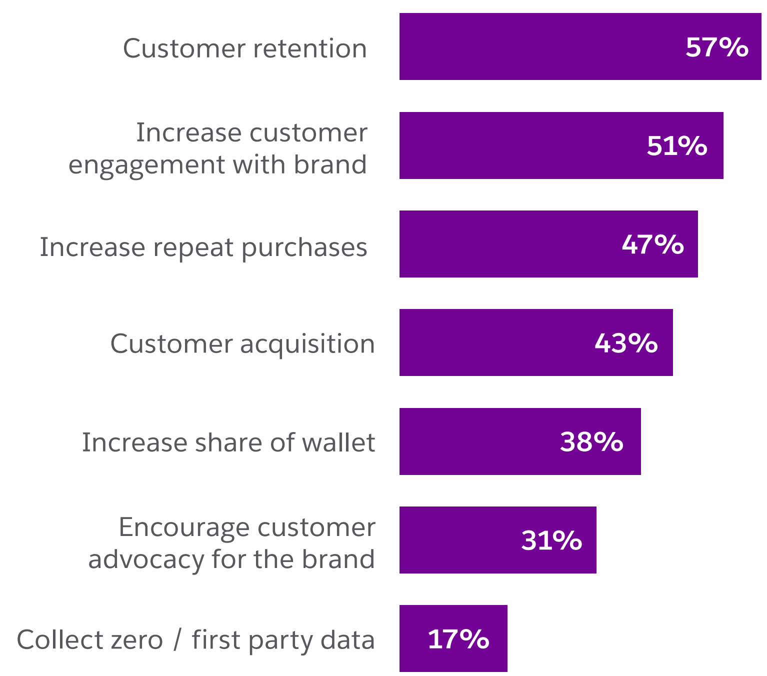
Unsurprisingly, retail decision makers' top goal for loyalty programs is customer retention. Yet other benefits – including increased customer engagement, repeat purchasing, and customer acquisition – are nearly as important.

75% of retailers already offer a loyalty program, with another 22% planning to introduce one in the next 24 months.

However, despite their popularity with shoppers, retailers don't always see the returns they expect from their programs. The biggest issue? A lack of customer insights for segmentation and targeting, followed by an inability to respond quickly to market opportunities.

Loyalty Strategy Extends Beyond Retention...

Retailers' Loyalty Program Goals



Base: Respondents in customer experience, ecommerce/digital strategy, or marketing roles at companies with existing or planned loyalty programs.

...But Lack of Insights Hinder Success

Top Barriers to Loyalty Program ROI

1. Lack of customer insights for targeting
2. Inability to rapidly react to market opportunities / competition
3. Inability to predict promotional revenue
4. Disparate systems to manage promotion lifecycle (conceptualize, configure, distribute, measure)
5. Lack of clarity into which promotion types resonate with loyalty members

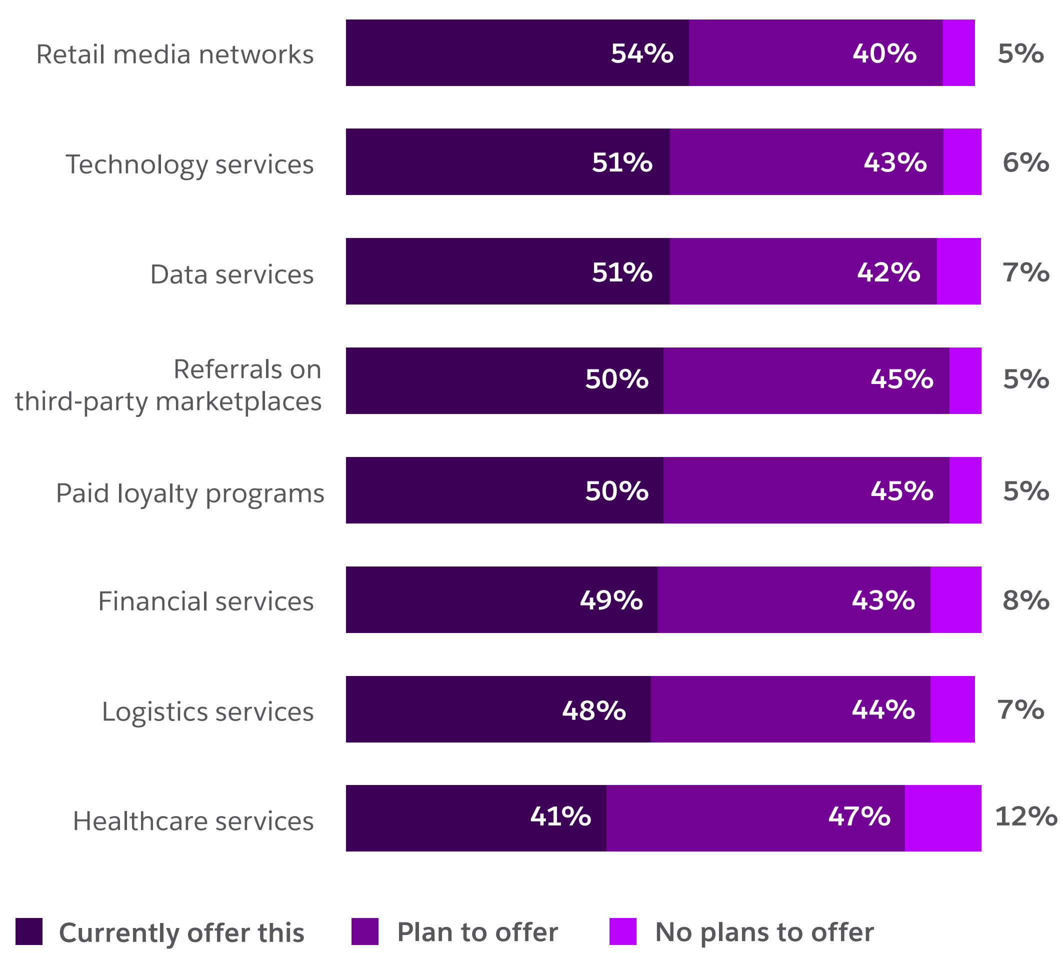
A LOOK AHEAD: Loyalty Data Fuels New Revenue Streams

Loyalty programs also let retailers monetize their data. Retail media networks, for example, are a high-margin business to watch. Not only are 54% of retailers already invested in media networks, another 40% plan to offer it in the next two years.

Why? Retailers can connect loyalty data and promotions to sales. Everyone wins: Shoppers get highly personalized deals and offers, while retailers see increased sales and share of wallet.

Retailers Look to Add New Revenue Streams

Retailers' Plans to Implement New Revenue Streams



Base: Respondents in customer experience, ecommerce/digital strategy, or marketing roles at companies with existing or planned loyalty programs.

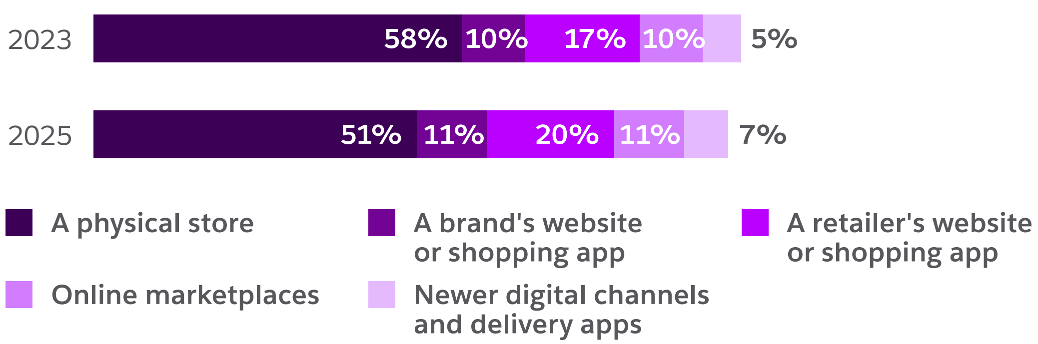
Appendix

Country: Australia & New Zealand

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Video or live chat

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging Apps
3. Chatbots, chat, or instant messaging

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Social media
3. Video or live chat

Business Profile

Retailers See ROI from a Unified Platform

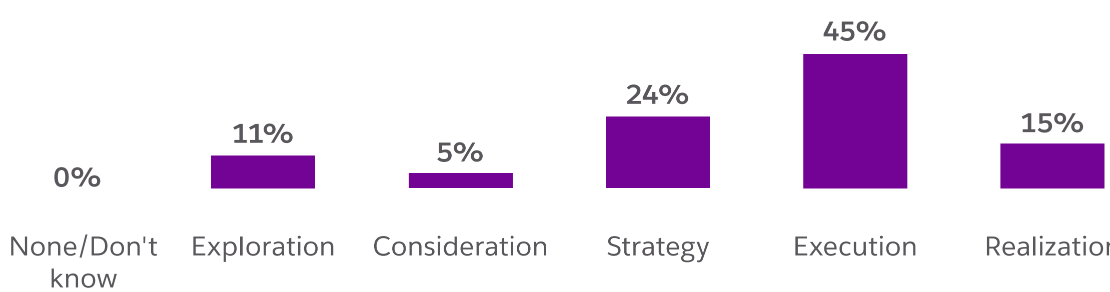
Top Benefits of Unified Engagement Platform

1. More data-driven decision making
2. Better ability to open new stores
3. Simplified data management and access
4. Improved personalization
5. Improved store associate productivity

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

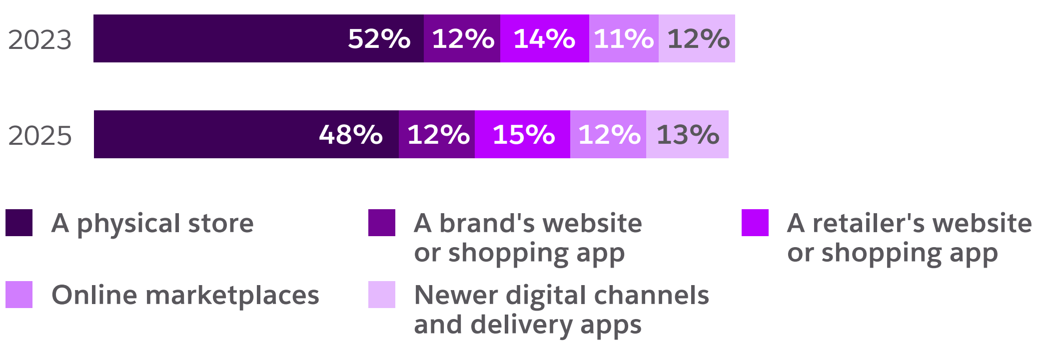


Country: Benelux (BE, LX, NL)

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

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2. Influencers
3. Messaging Apps

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging Apps
3. Chatbots, chat, or instant messaging

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Messaging apps
3. Social media

Business Profile

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Top Benefits of Unified Engagement Platform

1. Improved personalization
2. Simplified data management and access
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5. More seamless customer experiences across physical and digital channels

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Retailers Work Towards a Unified Engagement Platform

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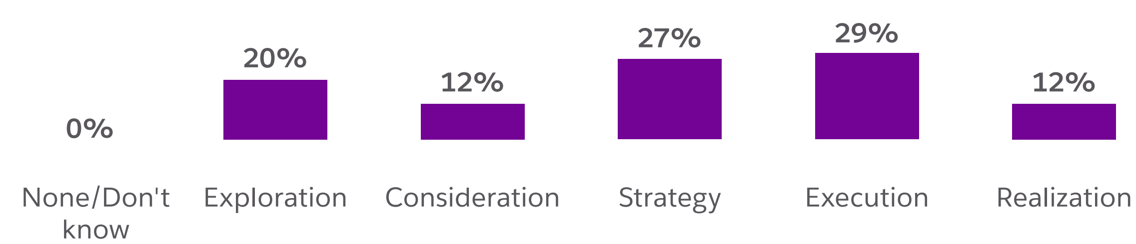
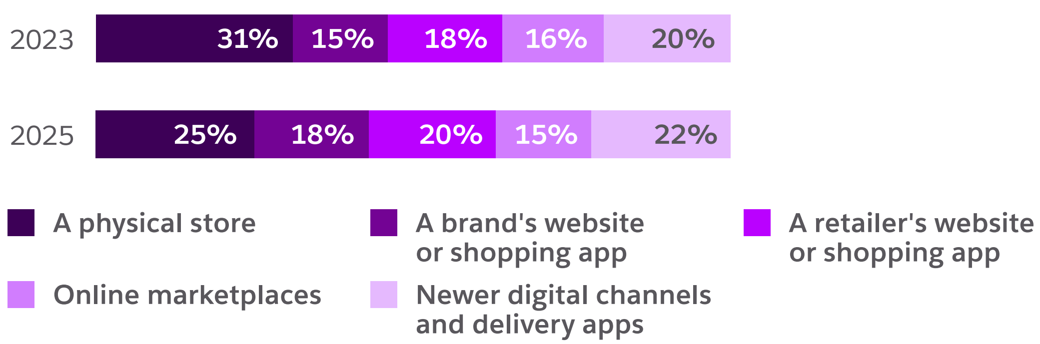


Country: Brazil

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

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Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Voice assistants

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Messaging apps
2. Chatbots, chat, or instant messaging
3. Social media

Business Profile

Retailers See ROI from a Unified Platform

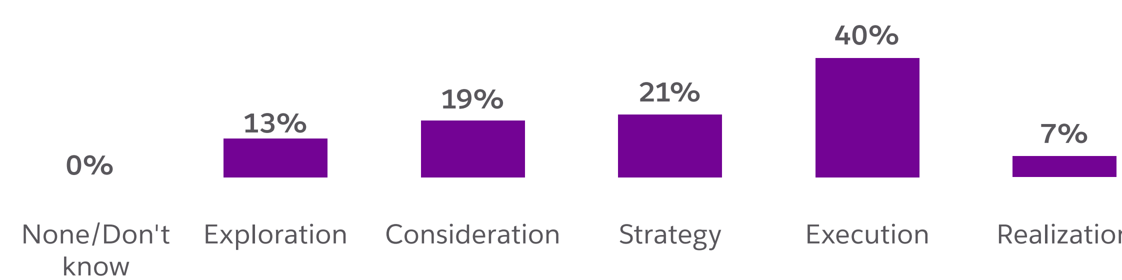
Top Benefits of Unified Engagement Platform

1. Real-time operations
2. Improved store associate productivity
3. More data-driven decision making
4. Improved store associate productivity
5. More seamless customer experiences across physical and digital channels

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

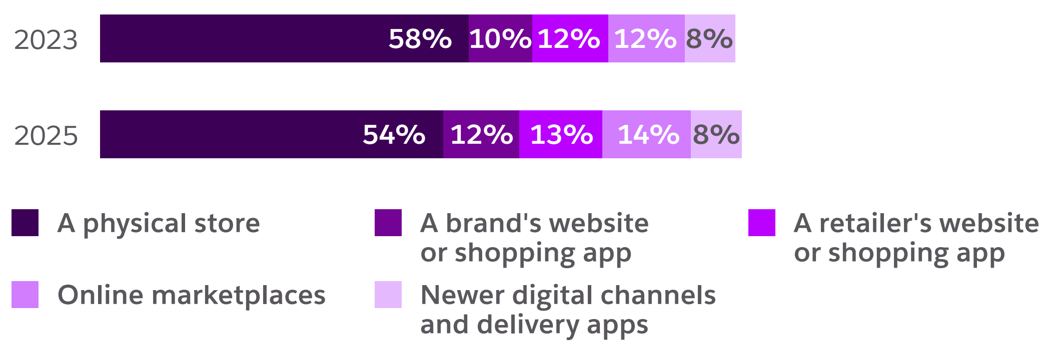


Country: Canada

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Live-stream video

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Chatbots, chat, or instant messaging

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Video or live chat
3. SMS/text

Business Profile

Retailers See ROI from a Unified Platform

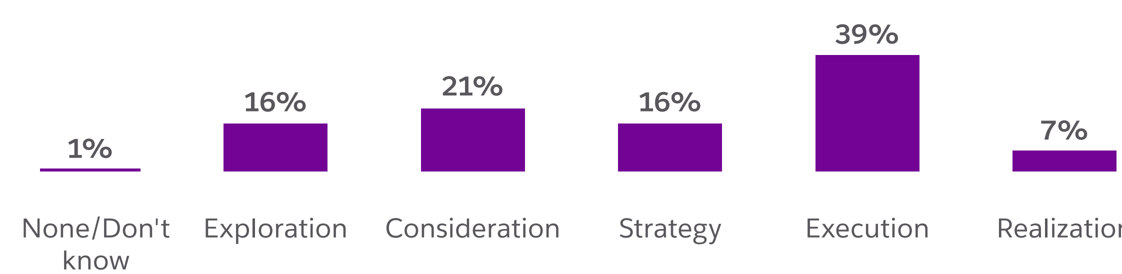
Top Benefits of Unified Engagement Platform

1. Improved personalization
2. Better ability to open new stores
3. Improved store associate productivity
4. More data-driven decision making
5. Simplified data management and access

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

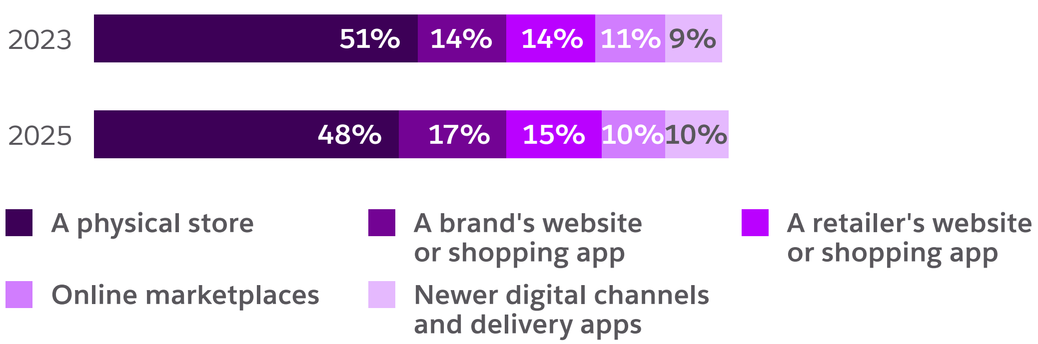


Country: France

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Messaging apps

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Voice assistants
3. Live-stream video

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Messaging app
3. SMS / text

Business Profile

Retailers See ROI from a Unified Platform

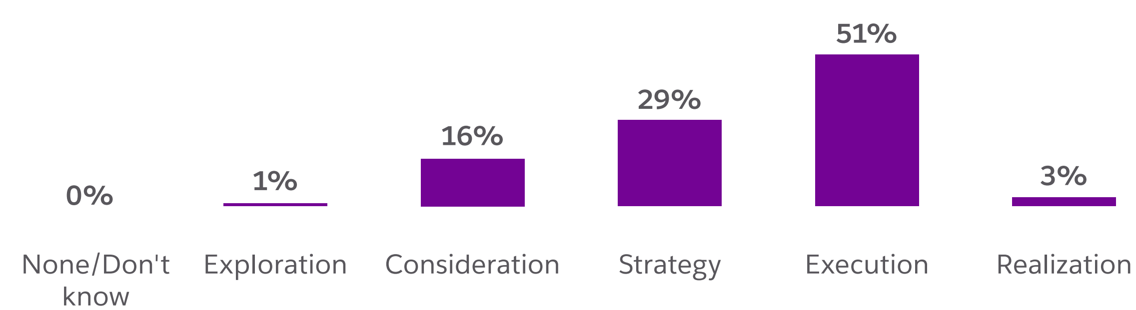
Top Benefits of Unified Engagement Platform

1. Improved store associate productivity
2. More data-driven decision making
3. Simplified data management and access
4. Real-time operations
5. More seamless customer experiences across physical and digital channels

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

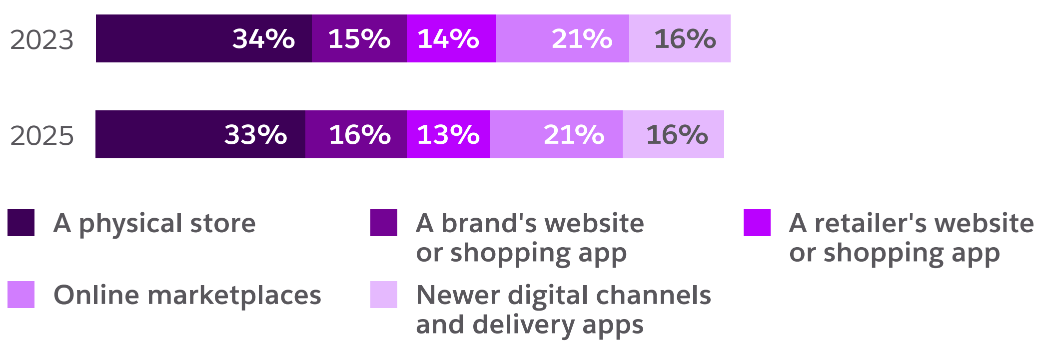


Country: Germany

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Messaging apps

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Live-stream video

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Messaging app
3. Social media

Business Profile

Retailers See ROI from a Unified Platform

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1. Improved personalization
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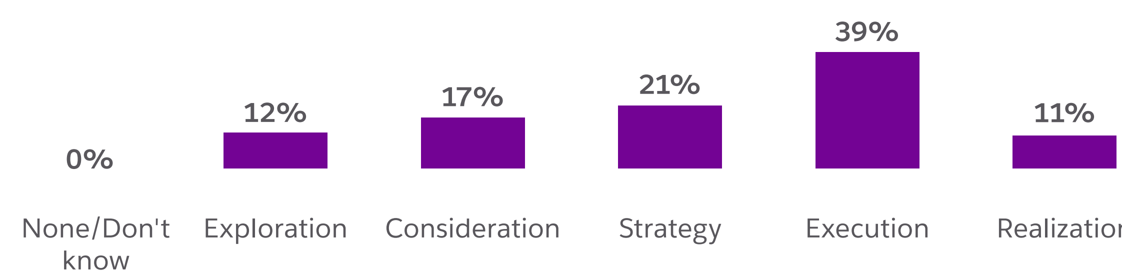
Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

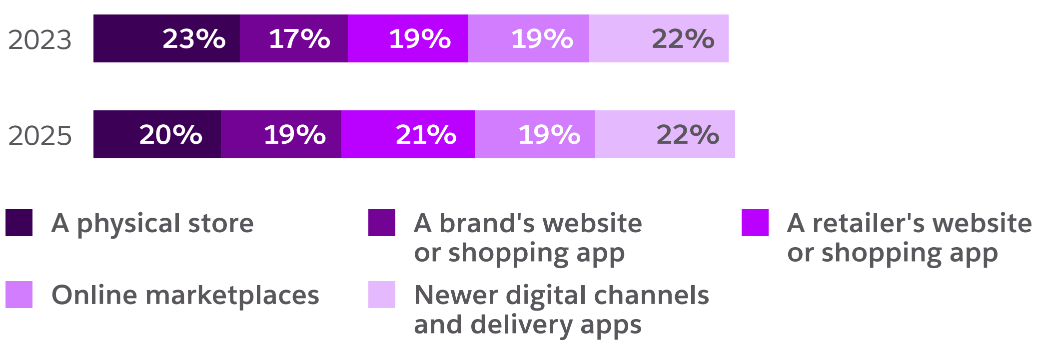


Country: India

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Messaging apps

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Voice assistants

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Social media
3. Messaging app

Business Profile

Retailers See ROI from a Unified Platform

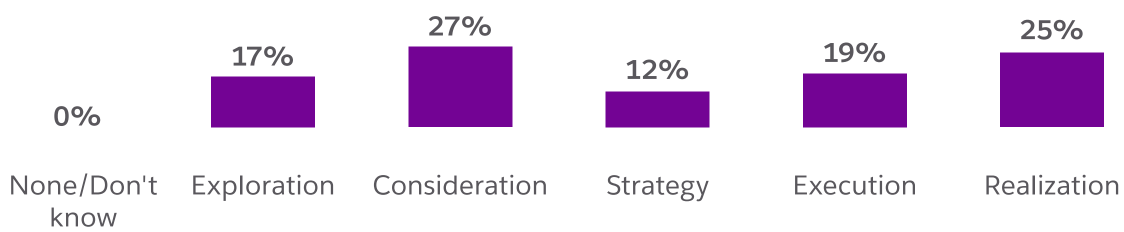
Top Benefits of Unified Engagement Platform

1. Improved personalization
2. Improved store associate productivity
3. Simplified data management and access
4. Better ability to open new stores
5. Simplified technology portfolio

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

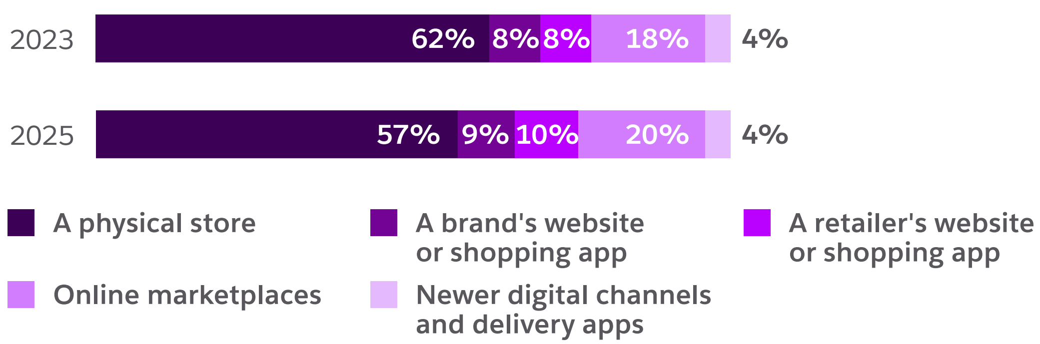


Country: Japan

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

Top **Emerging Digital** Channels Where Shoppers Discover Brands and Retailers

1. Social media
2. Influencers
3. Messaging apps

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Live-stream video

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. SMS / text
3. Social media

Business Profile

Retailers See ROI from a Unified Platform

Top Benefits of Unified Engagement Platform

1. Simplified data management and access
2. Improved personalization
3. Improved store associate productivity
4. Simplified technology portfolio
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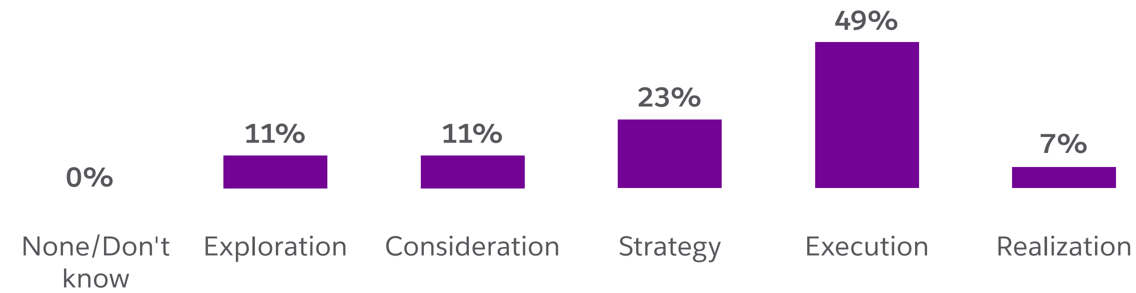
Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

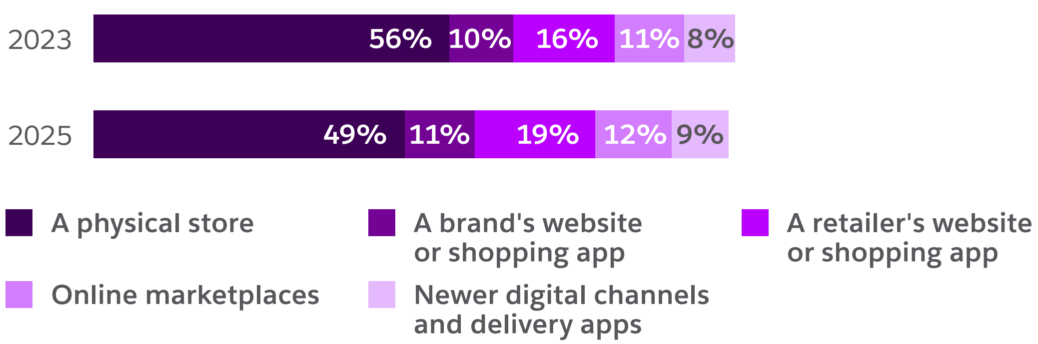


Country: Nordics (DK, FI, NO, SE)

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

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3. Video or live chat

Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Messaging apps
3. Chatbots, chat, or instant messaging

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Social media
3. Messaging apps

Business Profile

Retailers See ROI from a Unified Platform

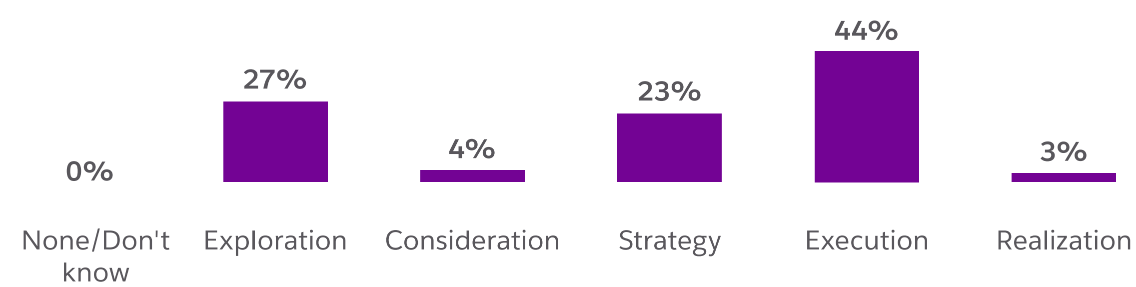
Top Benefits of Unified Engagement Platform

1. Simplified data management and access
2. Improved store associate productivity
3. Improved personalization
4. Real-time operations
5. More seamless customer experiences across physical and digital channels

Base: Respondents at organizations exploring, implementing, or have implemented a unified customer engagement platform.

Retailers Work Towards a Unified Engagement Platform

Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives

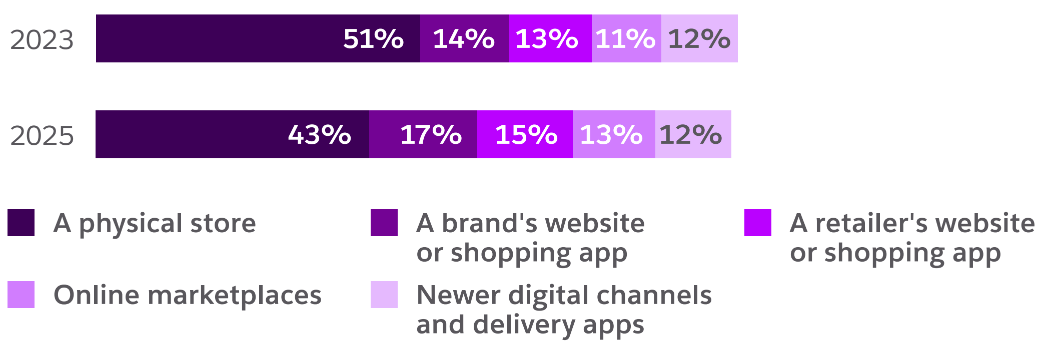


Country: Spain

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

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1. Social media
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Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
2. Voice assistants
3. Messaging apps

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Messaging apps
3. Social media

Business Profile

Retailers See ROI from a Unified Platform

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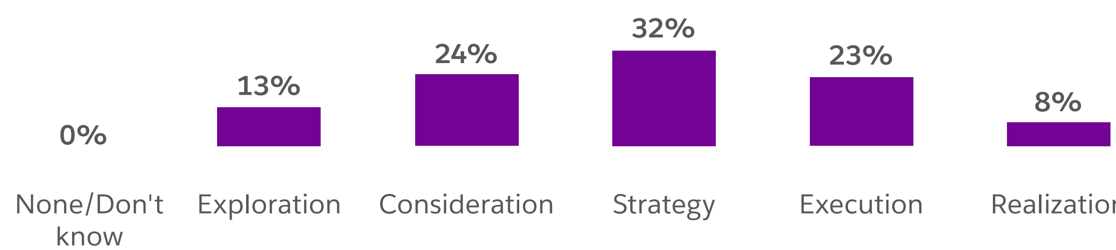
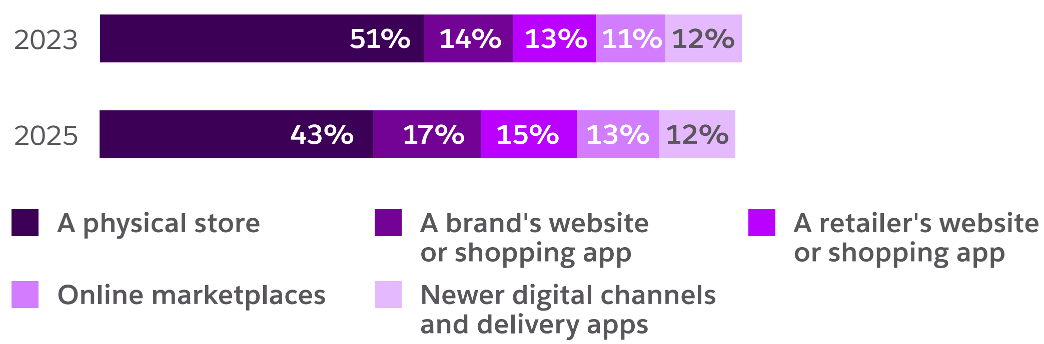


Country: United Kingdom

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



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1. Social media
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Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
2. Video or live chat
3. Social media

Business Profile

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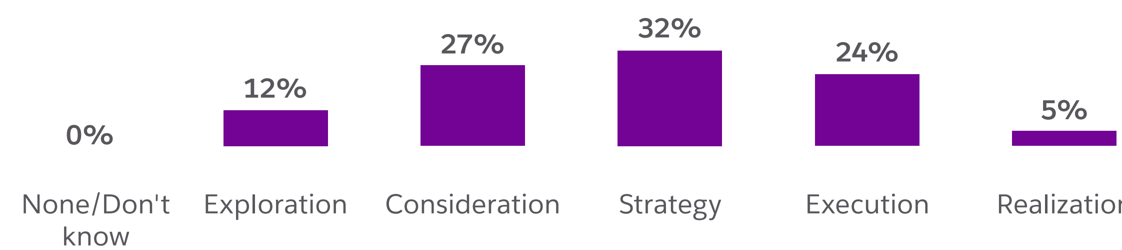
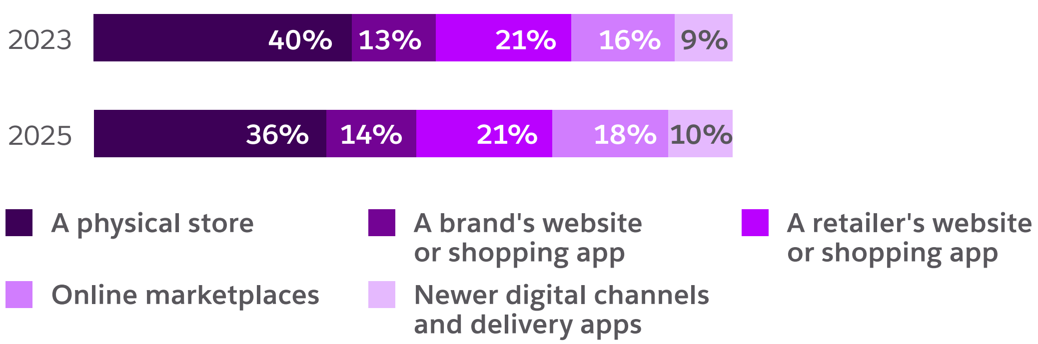


Country: United States

Shopper Profile

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels



Shopper Journeys Move to the Edge

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Top **Emerging Digital** Channels Where Shoppers Make Purchases

1. Social media
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3. Live-stream video

Top **Emerging Digital** Channels Where Shoppers Get Customer Service

1. Chatbots, chat, or instant messaging
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3. SMS / text

Business Profile

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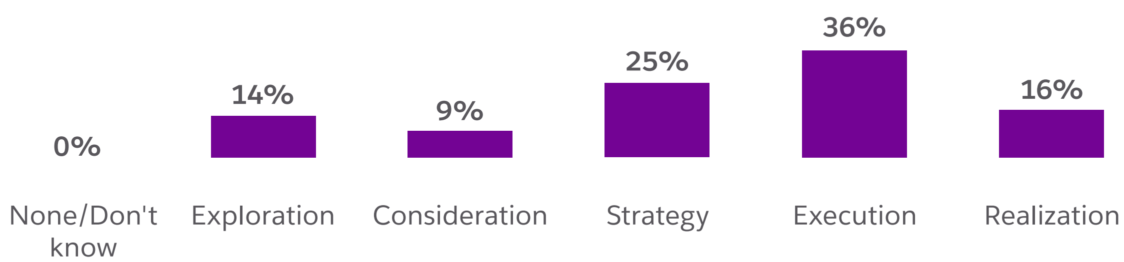
Self-Assessed Stages of Retailers' Unified Engagement Platform Initiatives



Survey Demographics

Survey Demographics (B2C)

Country

Australia/New Zealand	6.3%
Benelux (BE, LX, NL)	6.3%
Brazil	6.3%
France	6.3%
Germany	6.3%
India	6.3%
Japan	6.3%
Nordics (DK, FI, NO, SE)	6.3%
Spain	6.3%
United Kingdom	6.3%
United States	31.3%

Generation

Gen Z (born 1997-2004)	15%
Millennial (born 1981-1996)	33%
Gen X (born 1965-1980)	29%
Baby boomer (born 1946-1964)	23%

Gender

Male	48%
Female	51%
Other/Prefer not to answer	1%

Survey Demographics (B2B)

Country

Australia/New Zealand	7%
Benelux (BE, LX, NL)	7%
Brazil	7%
France	7%
Germany	7%
India	7%
Japan	7%
Nordics (DK, FI, NO, SE)	7%
Spain	7%
United Kingdom	7%
United States	27%

Department

Analytics and business intelligence	2%
Customer experience	4%
Customer service/support	5%
Ecommerce or digital/omnichannel strategy	10%
Information technology	21%
Marketing	8%
Retail or store operations	50%

Annual Revenue

$25-49.99M	8%
$50-99.99M	11%
$100-499.99M	28%
$500-999.99M	20%
$1-9.99B	20%
$10-49.99B	11%
$50B+	2%

Industry Segment

Apparel, accessories, and footwear	23%
Consumer electronics	17%
Department stores	15%
Discount or mass merchants	5%
Grocery	7%
Health and beauty	16%
Home, hardware, and garden	5%
Outdoor and sporting goods	8%
Other specialty retailer	4%

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Find out how to personalize loyalty member experiences so you can keep them coming back for more.

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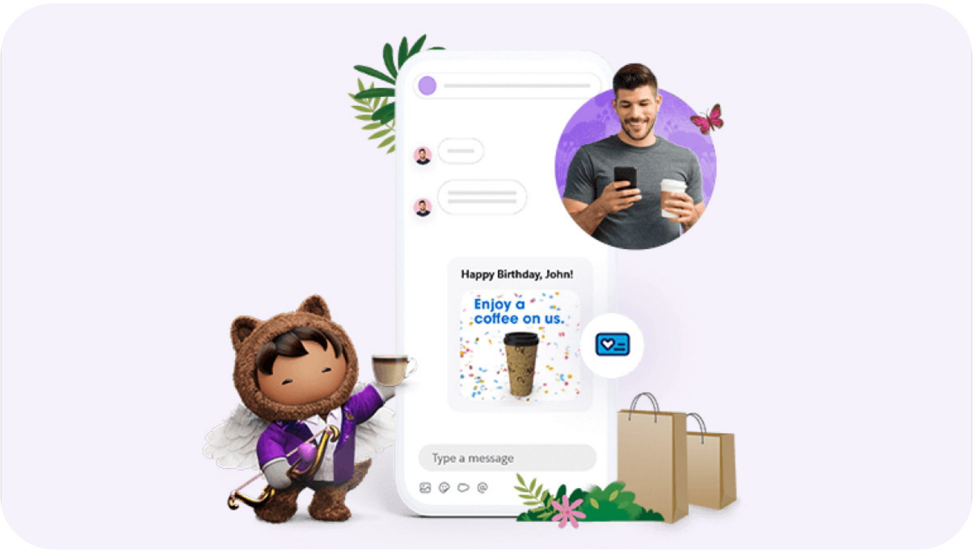

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