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).
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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
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.
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%.

*Chatbots, chat, or instant messaging
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

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Very Interested</th>
<th>Somewhat Interested</th>
<th>Neutral</th>
<th>Not so Interested</th>
<th>Not at all Interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researching electronics and appliances</td>
<td>18%</td>
<td>34%</td>
<td>23%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Getting outfit / wardrobe inspiration</td>
<td>16%</td>
<td>28%</td>
<td>22%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Creating meal plans</td>
<td>15%</td>
<td>29%</td>
<td>23%</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Getting beauty recommendations</td>
<td>14%</td>
<td>25%</td>
<td>22%</td>
<td>18%</td>
<td>21%</td>
</tr>
</tbody>
</table>
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.
2

Stores Become Experience Differentiators
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.
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.
Retailers Equip Associates with 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.

### Store Associates Use Mobile Devices Beyond the Cash Wrap

**Store Associates’ Mobile Device Tasks**

- **Loyalty program sign ups**: 51%
- **Providing customer service**: 51%
- **Point of sale**: 44%
- **Store operations and execution**: 39%
- **Creating and managing appointments**: 39%
- **Clienteling**: 35%
- **Store fulfillment**: 34%
- **Training**: 26%
- **Endless aisle**: 22%

*Base: IT and retail/store operations respondents at companies where store associates use mobile devices.*
**Shoppers Use Stores for Fulfillment**

**Shoppers Take Advantage of Convenient Fulfillment Options**

Shoppers Who Have Completed the Following Fulfillment Activities

- Purchased a product online to pick up in-store: 57%
- Went to a store to return a product: 53%
- Purchased a product to be shipped to me from a store: 49%
- Purchased a product online to ship to the store: 40%

**Retailers Use Stores as Fulfillment Centers**

Retailers’ Plans to Implement Store Fulfillment Capabilities

- Online returns to store: 64% Currently offer, 33% Plan to offer, 4% No plans to offer
- Ship-from-store: 61% Currently offer, 35% Plan to offer, 4% No plans to offer
- Same day delivery from store via third-party delivery services: 60% Currently offer, 37% Plan to offer, 4% No plans to offer
- Buy online-pick-up-in-store (BOPIS): 58% Currently offer, 38% Plan to offer, 4% No plans to offer
- Same day delivery from store with own drivers: 58% Currently offer, 37% Plan to offer, 5% No plans to offer
- Buy online, pick-up curbside: 57% Currently offer, 38% Plan to offer, 5% No plans to offer

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
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 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.

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

Retail Marketers Embrace Generative AI

Retailers’ Use of the Following Generative AI Use Cases

- Produce creative assets for ads, emails, social media, and websites: 58%
- Write personalized marketing emails: 56%
- Create personalized promotional offers: 54%
- Auto-generate personalized product descriptions: 53%

Base: Respondents in customer experience, ecommerce/digital strategy, or marketing roles.
Excellent Customer Service is Table Stakes for Shoppers
Bad Service Erodes Loyalty

Factors that Contribute to a Bad Shopper Experience

Shoppers Who View the Following as Among the Worst Retail Experiences

- Poor customer service: 53%
- Damaged products: 48%
- Out-of-stock products: 26%
- Poor return policy or experience: 24%
- Long checkout lines: 23%
- Having to pay for returns: 21%
- Having to pay for shipping: 16%
- Outdated stores: 14%
- Limited product assortment: 13%
- Environmentally unsustainable practices: 8%
- Lack of personalized experiences or products: 5%

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.*

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.
Service Goes Digital, But Voice Still Matters

Retailers Leverage Digital Channels for Service

Customer Service Channels in Use Among Retailers

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>79%</td>
</tr>
<tr>
<td>Phone</td>
<td>78%</td>
</tr>
<tr>
<td>In person</td>
<td>76%</td>
</tr>
<tr>
<td>Online chat / live support website</td>
<td>75%</td>
</tr>
<tr>
<td>Social media</td>
<td>75%</td>
</tr>
<tr>
<td>Text / SMS</td>
<td>75%</td>
</tr>
<tr>
<td>Customer portal</td>
<td>74%</td>
</tr>
<tr>
<td>Mobile app</td>
<td>73%</td>
</tr>
<tr>
<td>Knowledge bases</td>
<td>73%</td>
</tr>
<tr>
<td>Online forms</td>
<td>73%</td>
</tr>
<tr>
<td>Messenger apps</td>
<td>72%</td>
</tr>
<tr>
<td>Online communities / discussion forums</td>
<td>71%</td>
</tr>
<tr>
<td>Video support</td>
<td>69%</td>
</tr>
</tbody>
</table>


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.**


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.

<table>
<thead>
<tr>
<th>Retailers See Possibilities in Generative AI for Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retailers’ Use of the Following Generative AI Use Cases</td>
</tr>
<tr>
<td>Generate personalized responses for agents to quickly email or message customers</td>
</tr>
<tr>
<td>Power chatbots for service</td>
</tr>
<tr>
<td>Automate creation of knowledge base articles</td>
</tr>
<tr>
<td>Create summaries of customer service cases</td>
</tr>
</tbody>
</table>


Base: Respondents in customer experience, customer service and support, ecommerce/digital strategy, and IT roles.
5

Retailers See Increasing Value in Loyalty Program Data
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.

Shoppers See Value in Rewards Programs

What Shoppers Value in Loyalty Programs

- Earning points to redeem: 58%
- Special discounts and promotions: 53%
- Free shipping: 44%
- Birthday perks: 22%
- Free or discounted services (tailoring, styling, installation): 20%
- Early access to products and sales: 14%
- Personalized offers or product recommendations: 11%
- Redemption possibilities at other companies: 10%
- Exclusive access to limited edition products: 7%
- Rewards for sustainable practices (e.g., recycling products): 6%
- Ability to convert points into charity donations: 6%
- Access to experiences, such as special in-store events: 4%
- Gamification elements (e.g., contests): 3%

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.

<table>
<thead>
<tr>
<th>Loyalty Program</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points</td>
<td>70%</td>
</tr>
<tr>
<td>Cash back</td>
<td>44%</td>
</tr>
<tr>
<td>Tiered loyalty programs</td>
<td>25%</td>
</tr>
<tr>
<td>Co-branded credit cards</td>
<td>18%</td>
</tr>
<tr>
<td>Hybrid loyalty programs</td>
<td>17%</td>
</tr>
<tr>
<td>Coalition loyalty programs</td>
<td>15%</td>
</tr>
<tr>
<td>Fee-based loyalty programs</td>
<td>13%</td>
</tr>
</tbody>
</table>

Points and Cash Back Are the Most Common Loyalty Programs
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 Programs Benefit Retailers, But Obstacles Remain

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Loyalty Strategy Extends Beyond Retention...

Retailers’ Loyalty Program Goals

<table>
<thead>
<tr>
<th>Goal</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer retention</td>
<td>57%</td>
</tr>
<tr>
<td>Increase customer engagement with brand</td>
<td>51%</td>
</tr>
<tr>
<td>Increase repeat purchases</td>
<td>47%</td>
</tr>
<tr>
<td>Customer acquisition</td>
<td>43%</td>
</tr>
<tr>
<td>Increase share of wallet</td>
<td>38%</td>
</tr>
<tr>
<td>Encourage customer advocacy for the brand</td>
<td>31%</td>
</tr>
<tr>
<td>Collect zero / first party data</td>
<td>17%</td>
</tr>
</tbody>
</table>

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' Plans to Implement New Revenue Streams

<table>
<thead>
<tr>
<th>Service</th>
<th>Currently offer this</th>
<th>Plan to offer</th>
<th>No plans to offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail media networks</td>
<td>54%</td>
<td>40%</td>
<td>5%</td>
</tr>
<tr>
<td>Technology services</td>
<td>51%</td>
<td>43%</td>
<td>6%</td>
</tr>
<tr>
<td>Data services</td>
<td>51%</td>
<td>42%</td>
<td>7%</td>
</tr>
<tr>
<td>Referrals on third-party marketplaces</td>
<td>50%</td>
<td>45%</td>
<td>5%</td>
</tr>
<tr>
<td>Paid loyalty programs</td>
<td>50%</td>
<td>45%</td>
<td>5%</td>
</tr>
<tr>
<td>Financial services</td>
<td>49%</td>
<td>43%</td>
<td>8%</td>
</tr>
<tr>
<td>Logistics services</td>
<td>48%</td>
<td>44%</td>
<td>7%</td>
</tr>
<tr>
<td>Healthcare services</td>
<td>41%</td>
<td>47%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Physical Store</th>
<th>Brand's Website or Shopping App</th>
<th>Online Marketplaces</th>
<th>Newer Digital Channels and Delivery Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>58%</td>
<td>10%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>2025</td>
<td>51%</td>
<td>11%</td>
<td>20%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**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

- None/Don't know
- Exploration
- Consideration
- Strategy
- Execution
- Realization
Country: Benelux (BE, LX, NL)

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand's website or shopping app</th>
<th>A retailer's website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>52% 12% 14% 11% 12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>48% 12% 15% 12% 13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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. 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

Retailers See ROI from a Unified Platform
Top Benefits of Unified Engagement Platform
1. Improved personalization
2. Simplified data management and access
3. Better ability to open new stores
4. More data-driven decision making
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

None/Don't know 20% Exploration 12% Consideration 27% Strategy 29% Execution 12% Realization
Country: Brazil

### Shopper Profile

#### Where Shopping Transactions Take Place

*Estimated Volume of Purchases Across the Following Channels*

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand's website or shopping app</th>
<th>A retailer's website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>31%</td>
<td>15%</td>
<td>18%</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>2025</td>
<td>25%</td>
<td>18%</td>
<td>20%</td>
<td>15%</td>
<td>22%</td>
</tr>
</tbody>
</table>

#### 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. 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**

<table>
<thead>
<tr>
<th>Stage</th>
<th>None/Don't know</th>
<th>Exploration</th>
<th>Consideration</th>
<th>Strategy</th>
<th>Execution</th>
<th>Realization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>0%</td>
<td>13%</td>
<td>19%</td>
<td>21%</td>
<td>40%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Country: Canada

### Shopper Profile

#### Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A Physical Store</th>
<th>A Brand's Website or Shopping App</th>
<th>A Retailer's Website or Shopping App</th>
<th>Online Marketplaces</th>
<th>Newer Digital Channels and Delivery Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>58%</td>
<td>10%</td>
<td>12%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>2025</td>
<td>54%</td>
<td>12%</td>
<td>13%</td>
<td>14%</td>
<td>3%</td>
</tr>
</tbody>
</table>

- **A physical store**
- **A brand's website or shopping app**
- **A retailer's website or shopping app**
- **Online marketplaces**
- **Newer digital channels and delivery apps**

#### 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**

- **None/Don't know**: 1%
- **Exploration**: 16%
- **Consideration**: 21%
- **Strategy**: 16%
- **Execution**: 39%
- **Realization**: 7%
Country: France

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand’s website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>51%</td>
<td>14%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>2025</td>
<td>48%</td>
<td>17%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Stage</th>
<th>None/Don't know</th>
<th>Exploration</th>
<th>Consideration</th>
<th>Strategy</th>
<th>Execution</th>
<th>Realization</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>0%</td>
<td>1%</td>
<td>16%</td>
<td>29%</td>
<td>51%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Country: Germany

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>2023</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A physical store</td>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>A brand’s website or shopping app</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Online marketplaces</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Newer digital channels and delivery apps</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>A retailer’s website or shopping app</td>
<td>16%</td>
<td>16%</td>
</tr>
</tbody>
</table>

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

Top Benefits of Unified Engagement Platform

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

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: India

**Shopper Profile**

Where Shopping Transactions Take Place

Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>2023</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A physical store</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>A brand’s website or shopping app</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Online marketplaces</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Newer digital channels and delivery apps</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>A retailer’s website or shopping app</td>
<td>22%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Stage</th>
<th>0%</th>
<th>17%</th>
<th>27%</th>
<th>12%</th>
<th>19%</th>
<th>25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consideration</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategy</td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Execution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Realization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand's website or shopping app</th>
<th>A retailer's website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>62% 8% 8% 18%</td>
<td>4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>57% 9% 10% 20%</td>
<td>4%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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
5. Better ability to open new stores

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

<table>
<thead>
<tr>
<th>Channel</th>
<th>2023</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical store</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Online marketplaces</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>A brand’s website or shopping app</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>A retailer’s website or shopping app</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

**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. 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

- None/Don't know: 44%
- Exploration: 27%
- Consideration: 4%
- Strategy: 23%
- Execution: 0%
- Realization: 3%
Country: Spain

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand’s website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td></td>
<td>51% 14% 13% 11% 12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>43% 17% 15% 13% 12%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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. 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
Top Benefits of Unified Engagement Platform

1. Improved personalization
2. More data-driven decision making
3. Simplified data management and access
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: United Kingdom

Shopper Profile

**Where Shopping Transactions Take Place**
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Channel</th>
<th>2023</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>A physical store</td>
<td>51%</td>
<td>43%</td>
</tr>
<tr>
<td>A brand's website or shopping app</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>A retailer's website or shopping app</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Online marketplaces</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Newer digital channels and delivery apps</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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. Video or live chat
3. Social media

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. Improved personalization
4. Better ability to open new stores
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

- Exploration: 12%
- Consideration: 27%
- Strategy: 32%
- Execution: 24%
- Realization: 5%

None/Don't know: 0%
Country: United States

Shopper Profile

Where Shopping Transactions Take Place
Estimated Volume of Purchases Across the Following Channels

<table>
<thead>
<tr>
<th>Year</th>
<th>A physical store</th>
<th>A brand’s website or shopping app</th>
<th>A retailer’s website or shopping app</th>
<th>Online marketplaces</th>
<th>Newer digital channels and delivery apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>40%</td>
<td>13%</td>
<td>21%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>2025</td>
<td>36%</td>
<td>14%</td>
<td>21%</td>
<td>18%</td>
<td>10%</td>
</tr>
</tbody>
</table>

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. Live-stream video

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. Simplified data management and access
3. Improved store associate productivity
4. Better ability to open new stores
5. Real-time operations

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

- None/Don't know: 0%
- Exploration: 14%
- Consideration: 9%
- Strategy: 25%
- Execution: 36%
- Realization: 16%
Survey Demographics
## Survey Demographics (B2C)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia/New Zealand</td>
<td>6.3%</td>
</tr>
<tr>
<td>Benelux (BE, LX, NL)</td>
<td>6.3%</td>
</tr>
<tr>
<td>Brazil</td>
<td>6.3%</td>
</tr>
<tr>
<td>France</td>
<td>6.3%</td>
</tr>
<tr>
<td>Germany</td>
<td>6.3%</td>
</tr>
<tr>
<td>India</td>
<td>6.3%</td>
</tr>
<tr>
<td>Japan</td>
<td>6.3%</td>
</tr>
<tr>
<td>Nordics (DK, FI, NO, SE)</td>
<td>6.3%</td>
</tr>
<tr>
<td>Spain</td>
<td>6.3%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>6.3%</td>
</tr>
<tr>
<td>United States</td>
<td>31.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Generation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (born 1997-2004)</td>
<td>15%</td>
</tr>
<tr>
<td>Millennial (born 1981-1996)</td>
<td>33%</td>
</tr>
<tr>
<td>Gen X (born 1965-1980)</td>
<td>29%</td>
</tr>
<tr>
<td>Baby boomer (born 1946-1964)</td>
<td>23%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>48%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
</tr>
<tr>
<td>Other/Prefer not to answer</td>
<td>1%</td>
</tr>
</tbody>
</table>
## 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%

### 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%

### 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%
Learn More About Salesforce for Retail

Level up your loyalty program with data.
Find out how to personalize loyalty member experiences so you can keep them coming back for more.

Get the insights you need to drive retail success.
Stay up to date on the latest shopping trends with data from more than 1.5+ billion consumers.