THE FUTURE OF RETAIL: REPORT OF FINDINGS

A Quantitative Gap-Analysis Survey Fielded to Consumers and Retail Executives in the US, UK, and Australia

January 2019

TABLE OF CONTENTS

RESEARCH FOCUSES ON THE DISCONNECT BETWEEN SHOPPER DEMANDS AND WHAT RETAILERS DELIVER

For this research, Wakefield designed two quantitative studies – one for consumers and one for the retail audience to assess:

1. What do people want from the ideal shopping experience? What technology and innovation are they demanding to improve shopping – from AI to virtual reality assisting in the process?

2. Where are there major differences – or gaps – between what consumers actually want and what retailers believe consumers are looking for?

3. Where are there gaps and misperceptions about concerns or barriers – meaning things that hold shoppers back, but that retailers are unaware of or incorrectly believe to be shopper benefits?

RESEARCH METHODOLOGY

Research fielded between December 5th and December 17th, 2018 using custom online quantitative surveys among the following audiences:

1,200 CONSUMERS

- Nationally representative members of the General Population, ages 18+
- Markets Surveyed:
  - U.S.: 1,000 consumers
  - U.K.: 100 consumers
  - Australia: 100 consumers
- Additional sub-audience analysis by generational groups: Older Gen Z (18-21), Millennial (22-37), Gen X (38-53), and Boomer (54-72)

400 RETAIL EXECUTIVES

- Executives (Executive Director or higher) at retail companies with between $10-$100 million in annual sales
- Markets Surveyed:
  - U.S.: 200 retailers
  - U.K.: 100 retailers
  - Australia: 100 retailers

The margin of error for this study is +/- 3.1 percentage points at the 95% confidence level for the U.S. consumer sample, +/- 6.9 percentage points at the 95% confidence level for the U.S. retail executive sample, and +/- 9.8 percentage points at the 95% confidence level for the U.K. and Australia consumer and retail executive samples.

KEY FINDINGS

THE FUTURE OF BRICK AND MORTAR

Brick and mortar is not going away anytime soon, but there exists a growing disconnect between retailers and consumers on the value the in-store shopping experience provides.

Almost all (97%) consumers agree there remains a need to go into a physical store and purchase items, most often for groceries, clothes, and larger purchases such as cars and furniture. However, how welcomed consumers feel once in the store contrasts with what retailers believe they are providing. Retailers believe the in-store retail environment is much more inviting today (73%), while consumers are torn: 45% believe stores are more inviting and 55% believe stores have stayed the same or have gotten worse. Today, more than half (53%) of consumers are left feeling stressed, anxious, alone, overwhelmed, or confused in the store.

Retailers have a more optimistic outlook on the future, with 50% expecting consumers to engage in more in-store shopping in 2019. Consumers are less enthusiastic, with the majority (58%) reporting they will do about the same amount of in-store shopping as last year, and only 28% reporting they will do more in-store shopping in 2019.

PERSONALIZING THE IN-STORE SHOPPING EXPERIENCE

There is a sizable group of consumers who would pay more for a product if they had a more personalized in-store experience. Today, more needs to be done by retailers to deliver an experience worth paying more for.

The majority of consumers (80%) do not feel they are provided with a personalized shopping experience both in-store and online – including a sizeable group (38%) who *never* feel they are provided a personalized experience. Nearly half (44%) of retailers have not made any progress in tailoring the in-store experience to different generations. Particularly to older generations, who are more likely than other generational groups to feel they are *never* given a personalized experience, online or in-store (52%).

Paying more for personalization is something that more than 2 in 5 (42%) consumers would do. Millennials are particularly more keen on improved personalization, as more than 3 in 5 (63%) would pay more.

Advanced technologies leave many consumers currently feeling uncomfortable. Consumers report a creepiness factor associated with increased personalization through advanced technologies.

Nearly 3 in 5 (58%) consumers feel uncomfortable with the way technology is currently used to personalize their experience in the store. These feelings transcend into online shopping, but to a slightly lesser degree, with 45% of consumers feeling negative emotions when retail sites know info about them.

THE IDEAL SHOPPING EXPERIENCE

A consumer's ideal shopping experience is one that is simple and streamlined.

The retail store of the future is one that simplifies the shopping experience for consumers, by offering features in-store that allow consumers to find what they need and purchase it quickly. When shopping in-store, over 1 in 3 consumers want options that are consistent with online (36%) and simpler store layouts (35%). This is particularly true for Gen Zers, who are most interested in these features. When it comes to the specific technologies that consumers would most want to utilize, self-checkout kiosks (38%) is the #1 choice.

Retailers are overly optimistic about the impact advanced technologies, such as VR or AI, will have on consumers' shopping experience. These technologies may drive some foot traffic to the store, but will not automatically translate into a deciding factor in consumers purchasing decisions.

Despite nearly all of retailers (98%) believing technology will increase foot traffic, only 1 in 3 (33%) consumers would be more enticed to walk into a store that featured this technology. And for those who are interested, only a small group (14%) would be significantly more influenced to purchase a product because of it.

BRAND RELATIONSHIPS: AN EXTENSION OF THE CONSUMER EXPERIENCE

Despite consumers engaging with brands more and more, the majority of consumers do not feel they have stronger relationships with brands compared to 5 years ago. This trend has the possibility to reverse with the rise of Gen Z consumers, who are much more engaged with brands across social media.

Currently, most consumers are engaging with brands on social media as one part of their experience, either for a specific purchase such as learning about sales and promotions (42%) or for information such as staying up-to-date about the latest products (36%).

Retailers are currently overstating consumers' engagement with brands; however, their optimism may not be so misplaced as brands' social media presence and level of impact with Gen Z consumers continues to grow.

Gen Z consumers are much more likely than other generational groups to not only engage with brands in order to get to know them more (38% compared to 26% overall). Gen Zers are also more likely to feel their engagement has an impact on the way they think or feel about those brands (65% vs 41%).

DETAILED RESEARCH FINDINGS

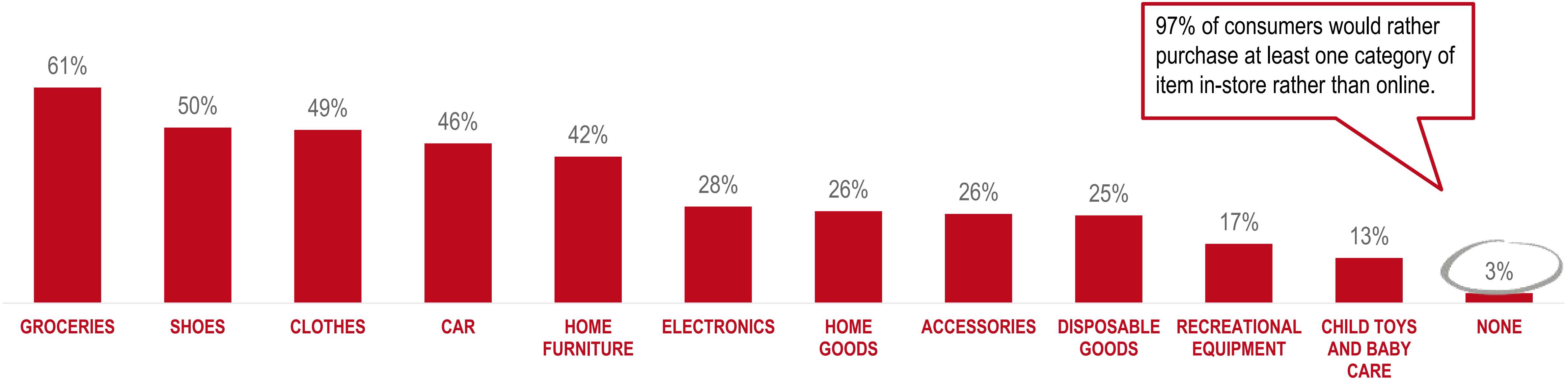
THE FUTURE OF BRICK AND MORTAR

ORACLE NETSUITE

THERE IS STILL A PLACE FOR BRICK AND MORTAR RETAIL

Today, almost all consumers (97%) would rather purchase at least one category listed below in-store rather than online. Most often consumers would prefer to purchase groceries (61%), shoes (50%), clothes (49%) and larger purchase items such as cars (46%) or home furniture (42%) in-store.

ITEMS CONSUMERS PREFER TO PURCHASE IN A PHYSICAL STORE RATHER THAN ONLINE
AMONG CONSUMERS, N=1,200



Among consumers: Which of the following items – if any – would you prefer to purchase in a physical store rather than online?

HOWEVER THE IN-STORE EXPERIENCE CAN BE IMPROVED

The majority of consumers do not feel that retail stores today are more inviting compared to five years ago. In fact, nearly 1 in 5 (19%) feel that stores have actually become *less* inviting.

COMPARED TO 5 YEARS AGO, THE OVERALL ENVIRONMENT IN MOST RETAIL STORES THE CONSUMER SHOPS AT TODAY IS…

Among consumers: Compared to 5 years ago, would you say the overall environments in most of the retail stores you shop at today have become more or less inviting for consumers like yourself? Among retail executives: Compared to 5 years ago, would you say the overall environments in most retail stores have become more or less inviting for consumers generally?

THE RETAIL ENVIRONMENT DIFFERS ACROSS CUSTOMERS AND COUNTRY

Country Differences:
Almost half (49%) of U.K. consumers feel the retail environment has stayed **exactly the same.**

Country Differences:
Almost 3 in 5 (57%) Australian consumers feel the retail environment is **more inviting.**

Generational Differences:
Over 1 in 4 (27%) Boomers feel the retail environment is **less inviting** compared to only 1 in 7 (14%) Gen Zers and 1 in 8 (12%) Millennials.

CONSUMER THOUGHTS ON RETAIL ENVIRONMENT COMPARED TO 5 YEARS AGO	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MORE INVITING (NET)	45%	45%	34%	57%	57%	57%	40%	36%
STAYED EXACTLY THE SAME	35%	34%	49%	36%	30%	31%	39%	38%
LESS INVITING (NET)	19%	21%	17%	7%	14%	12%	21%	27%

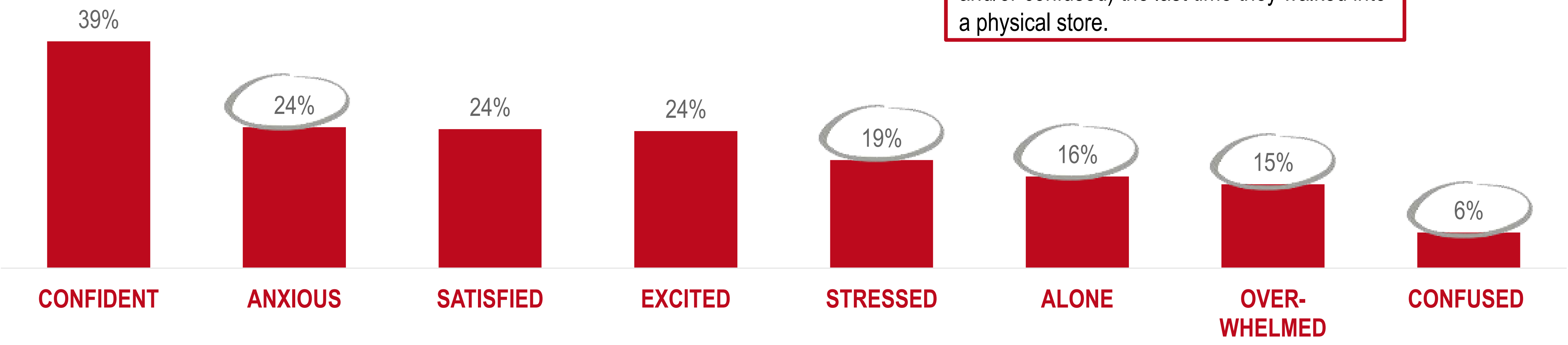
Among consumers: Compared to 5 years ago, would you say the overall environments in most of the retail stores you shop at today have become more or less inviting for consumers like yourself? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

MOST CONSUMERS DO NOT FEEL CONFIDENT IN A STORE

Despite it being a top priority for retailers, only 39% of consumers feel confident in retail stores today. Instead, the majority of consumers (53%) felt some form of negative emotion the last time they visited a store.

THE LAST TIME YOU WALKED INTO THE STORE, DID YOU FEEL…
AMONG CONSUMERS, N=1,200

53% of consumers felt a negative emotion (anxious, stressed, alone, overwhelmed, and/or confused) the last time they walked into a physical store.

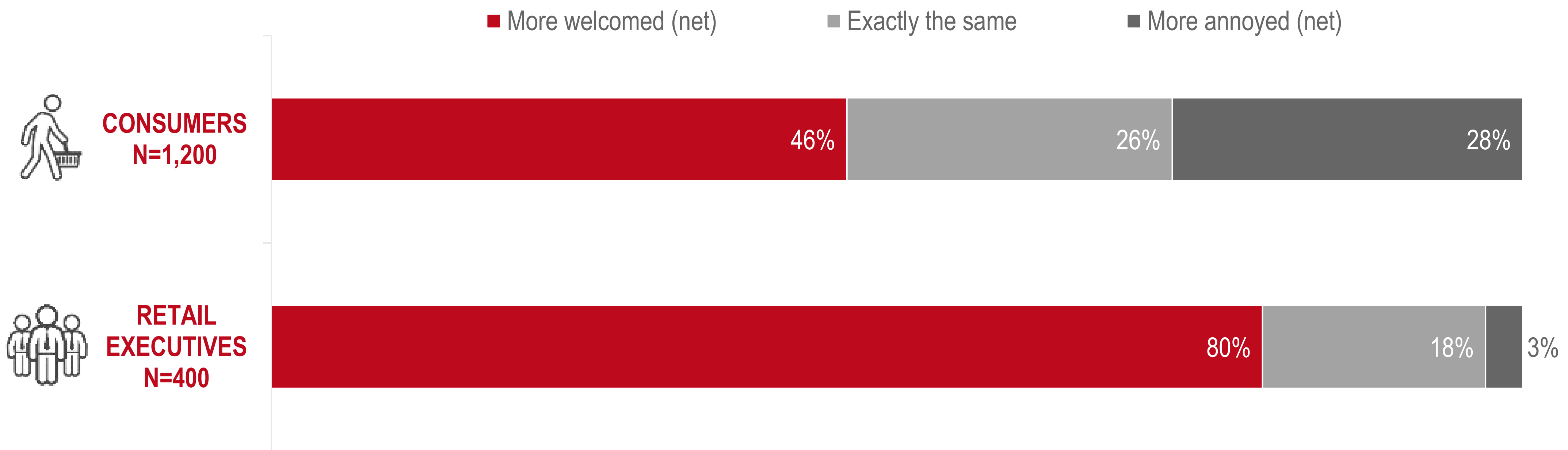


Among consumers: The last time you walked into a store to purchase something in-person rather than online, (such as clothes, a gift, or something for your home) which of the following emotions – if any – did you feel while in the store?

MORE INTERACTIONS IN THE STORE OFTEN RESULT IN MORE ANNOYANCE

Retailers are missing the mark on human interaction in-store. While the majority of retailers (80%) believe that consumers would feel more welcomed if store staff interacted with them more, less than half (46%) of consumers agree. In fact, there's a sizable group (28%) who would actually feel more *annoyed* by this.

IF STORE STAFF SPENT MORE TIME INTERACTING WITH THE CONSUMER, THEY WOULD FEEL…



Among consumers: If the store staff spent more time interacting with you from the moment you walked into the store, would you feel more welcomed or more annoyed? Among retail executives: Would typical consumers today feel more welcomed or annoyed if store staff spent more time interacting with the consumer from the moment he or she walked in?

MILLENNIALS DESIRE MORE, GEN Z DESIRES LESS, IN-STORE INTERACTION

Generational Differences:
More than 2 in 5 (42%) Gen Zers would feel more **annoyed** with an increase in store staff interaction. Interestingly, more than half (56%) of Millennials would feel more **welcomed.**

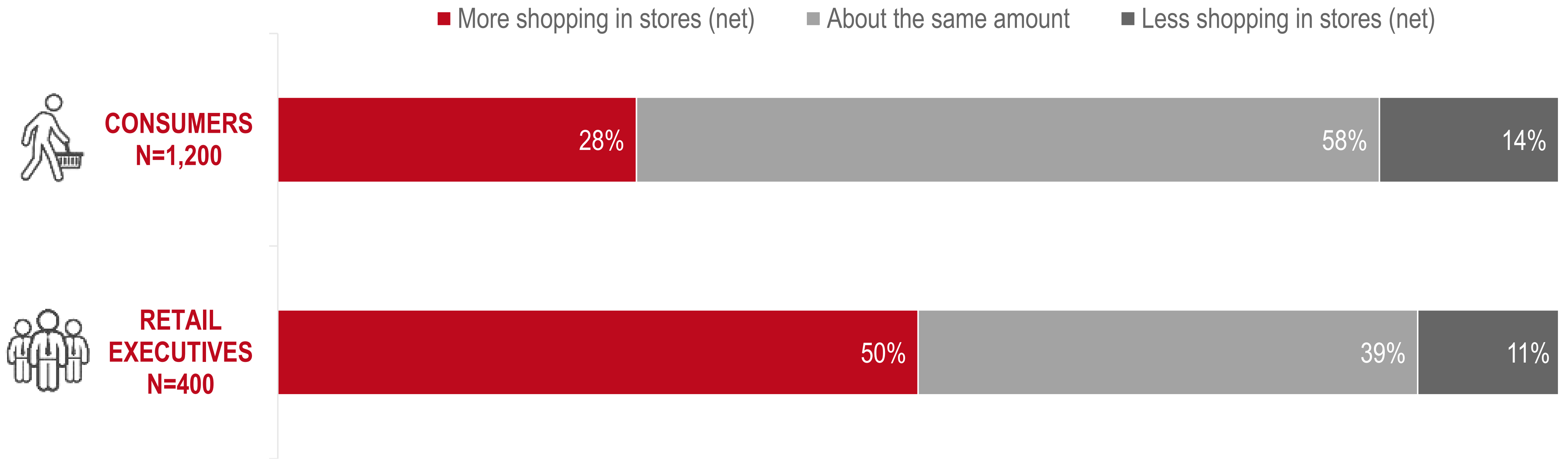
CONSUMER FEELINGS IF STORE STAFF SPENT MORE TIME INTERACTING WITH THEM	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MORE WELCOMED (NET)	46%	47%	31%	46%	40%	56%	44%	43%
EXACTLY THE SAME	26%	25%	39%	25%	18%	21%	25%	29%
MORE ANNOYED (NET)	28%	28%	30%	29%	42%	23%	31%	27%

Among consumers: If the store staff spent more time interacting with you from the moment you walked into the store, would you feel more welcomed or more annoyed? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

RETAILERS ARE OVERLY OPTIMISTIC ON FUTURE IN-STORE SHOPPING

Retailers' current efforts to drive more in-store shopping are not translating as much as they anticipate. While half of retailers are expecting consumers to do more shopping in 2019, nearly 3 in 4 (72%) consumers are planning to do the same amount or less.

AMOUNT OF SHOPPING THE CONSUMER PLANS TO DO IN STORES IN 2019



Among consumers: Compared to last year, how much more or less shopping do you plan to do in stores in 2019? Among retail executives: Compared to last year, how much more or less shopping do you expect consumers to do in stores in 2019?

YOUNGER GENERATIONS ARE MORE LIKELY TO DO MORE SHOPPING IN-STORE

Generational Differences:
More than 2 in 5 (43%) Gen Z and Millennial consumers plan on doing more shopping in physical stores in 2019.

CONSUMER THOUGHTS ON SHOPPING IN-STORE IN 2019	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MORE SHOPPING IN STORES (NET)	28%	29%	19%	33%	43%	43%	29%	13%
ABOUT THE SAME AMOUNT	58%	57%	69%	53%	51%	43%	56%	71%
LESS SHOPPING IN STORES (NET)	14%	15%	12%	14%	6%	14%	15%	16%

Among consumers: Compared to last year, how much more or less shopping do you plan to do in stores in 2019? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

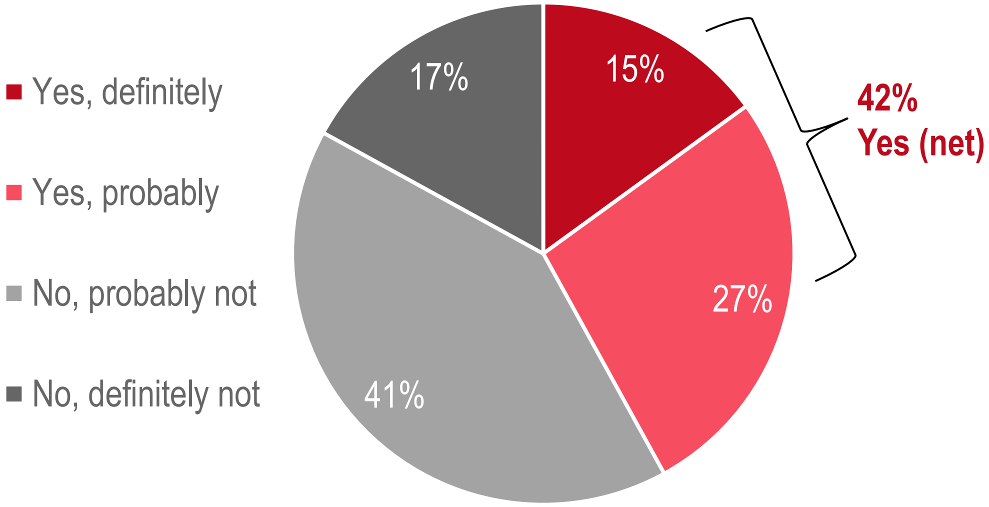
PERSONALIZATION USING ADVANCED TECHNOLOGIES

THERE IS A WILLINGNESS TO PAY MORE FOR IMPROVED PERSONALIZATION

Today, many consumers (42%) are willing to pay more for a product in order to have a more personalized shopping experience. Millennials (63%) are most likely to pay more.

CONSUMERS WILLING TO PAY MORE FOR IN-STORE PERSONALIZATION

AMONG CONSUMERS, N=1,200



CONSUMERS WILLING TO PAY MORE FOR IN-STORE PERSONALIZATION	TOTAL N=1,200	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
YES, DEFINITELY	15%	21%	28%	16%	5%
YES, PROBABLY	27%	29%	35%	27%	20%
NO, PROBABLY NOT	41%	44%	28%	38%	52%
NO, DEFINITELY NOT	17%	6%	9%	19%	23%

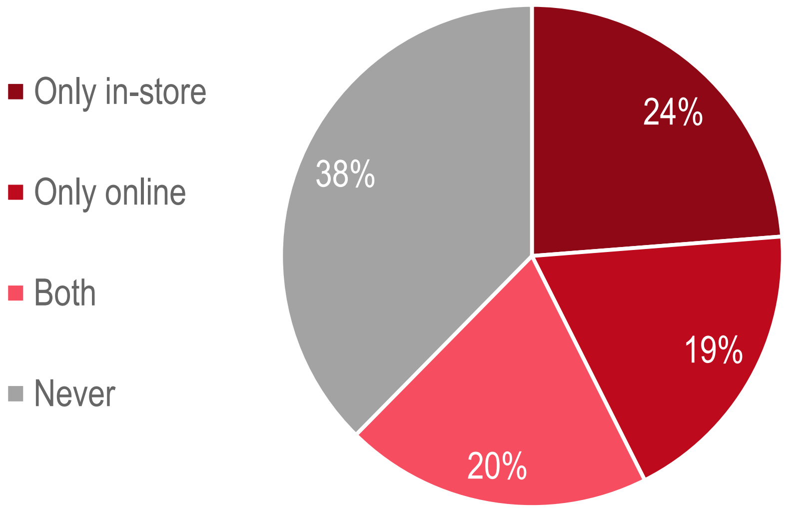
Generational Differences:
More than 3 in 5 (63%) Millennials are **willing to pay more** for a personalized in-store shopping experience.

Among consumers: Would you be willing to pay more for a product if a knowledgeable sales associate could personalize your shopping experience in-store? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

CONSUMERS DO NOT YET FEEL THAT THEY ARE GIVEN A PERSONALIZED EXPERIENCE WHEN SHOPPING

There is work to be done when it comes to providing consumers with a personalized experience. Today, the majority of consumers (80%) do not feel they are provided with a personalized shopping experience both in-store and online – including a sizeable group (38%) who never feel they are provided with a personalized shopping experience.

WHERE CONSUMERS ARE PROVIDED WITH A PERSONALIZED SHOPPING EXPERIENCE
AMONG CONSUMERS, N=1,200



WHERE CONSUMERS ARE PROVIDED WITH A PERSONALIZED SHOPPING EXPERIENCE	TOTAL N=1,200	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
ONLY IN-STORE	24%	23%	25%	19%	24%
ONLY ONLINE	19%	32%	26%	24%	7%
BOTH	20%	23%	23%	19%	16%
NEVER	38%	23%	26%	38%	52%

Generational Differences:
Over half (52%) of Boomers feel they never receive a personalized shopping experience either in store or online – compared to only 1 in 4 Gen Z (23%) consumers and Millennial consumers (26%).

Among consumers: When shopping, do you feel that you are provided with a personalized shopping experience? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

INSTEAD OF RETAILERS MAKING CONSUMERS FEEL MORE WELCOME, THEY ARE INVADING THEIR PERSONAL BUBBLE

Technology is still missing the mark when it comes to personalization in-store. From the retailer perspective, more than 4 in 5 (82%) feel that at least one of the technologies that allow automated purchase profiles makes consumers feel more welcome, such as the ability to look up past purchases or having personal/financial information saved.

WAYS RETAIL EXECUTIVES THINK STORE STAFF AND TECHNOLOGY HAS MADE CUSTOMERS FEEL WELCOME

AMONG RETAIL EXECUTIVES, N=400

47% Recommendations On Products

43% Saved Personal Info

41% Staff Approaches Customer

41% Looking Up Past Purchases

37% Staff Greets Customer By Name

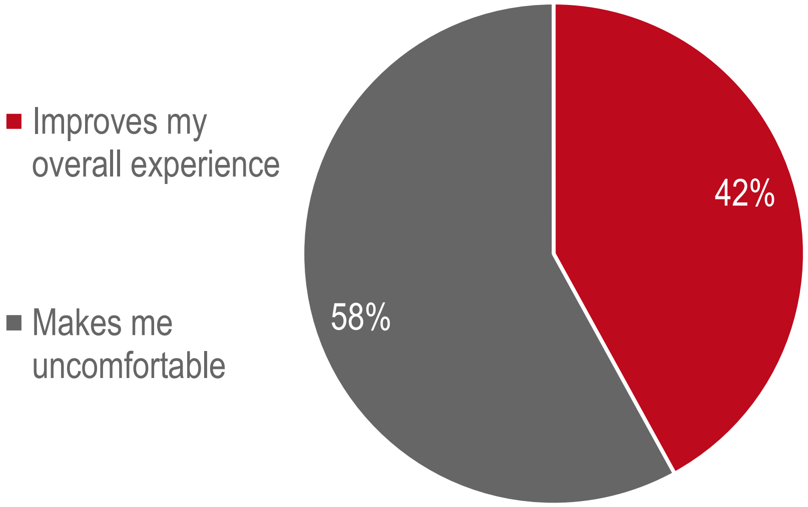
32% Knows Customer's Finances

Among retail executives: In what ways do you feel your store staff and the technology in the store environment has made customers feel welcome?

CONSUMERS ARE STILL LEFT FEELING UNCOMFORTABLE ABOUT PERSONALIZATION IN-STORE

In contrast, the majority of consumers (58%) are uncomfortable with the way stores use technology to improve personalization in their shopping experience. Boomers (64%) are particularly less comfortable with this.

CONSUMER VIEW ON TECHNOLOGY IMPROVING PERSONALIZATION
AMONG CONSUMERS, N=1,200



CONSUMER VIEW ON TECHNOLOGY IMPROVING PERSONALIZATION	TOTAL N=1,200	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MAKES ME UNCOMFORTABLE	58%	51%	51%	57%	64%
IMPROVES MY OVERALL EXPERIENCE	42%	49%	49%	43%	36%

Generational Differences:
Almost 2 in 3 (64%) Boomers are uncomfortable with the way stores use technology to improve personalization in their shopping experience.

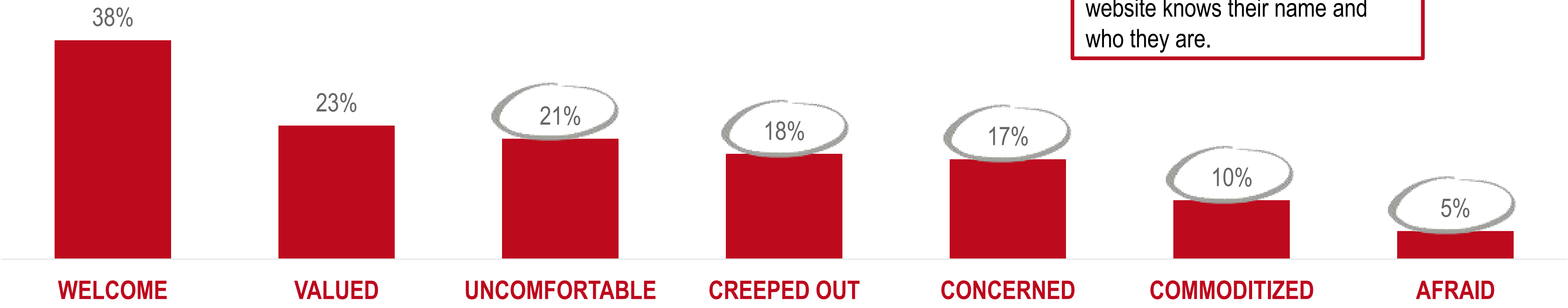
Among consumers: Which of the following is closest to your view when it comes to technology improving personalization for your shopping experience? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

CONSUMERS ARE FEELING THE SAME NEGATIVE EMOTIONS ABOUT PERSONALIZATION ONLINE

A sizeable group of consumers (45%) are still left feeling similar negative emotions when shopping online. Despite the efforts of retailers to use personalization to make consumers feel more welcome, only 38% actually feel that way.

WHEN A RETAILER'S WEBSITE KNOWS THE CONSUMER'S NAME AND WHO THEY ARE, THAT MAKES THEM FEEL…
AMONG CONSUMERS, N=1,200

45% of consumers report a negative emotion when a retailer's website knows their name and who they are.



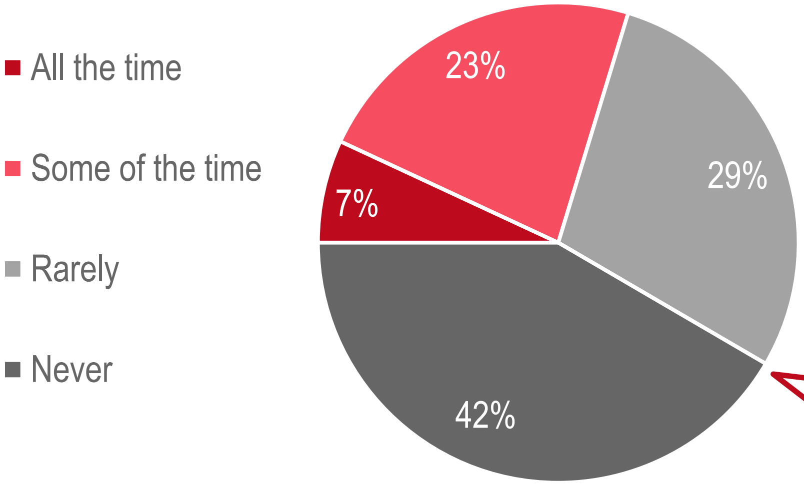
Among consumers: When you go online to a retailer's website and the site knows your name and who you are already, how does that make you feel?

AI-ASSISTED CHATBOTS ARE LESS APPEALING TO CONSUMERS THAN RETAILERS THINK

When it comes to AI-assisted chatbots, retailers are even more off the mark. While 87% of retailers believe consumers are interested in this technology, only 7% of consumers frequently use it. Nearly 4 in 5 (79%) retailers agree that the use of AI-assisted online chat during the shopping experience is meeting customers' needs.

USE OF AI-ASSISTED CHAT WINDOWS DURING ONLINE SHOPPING

AMONG CONSUMERS, N=1,200



70% of consumers rarely or never use AI-assisted chat windows while online shopping.

RETAIL EXECUTIVE OPINIONS ON AI-ASSISTED CHATBOTS

AMONG RETAIL EXECUTIVES, N=400

of retail executives believe consumers **are interested in using** AI-assisted chatbots.

of retail executives agree the use of AI-assisted online chat **is meeting customer's needs.**

Among consumers: How often do you use the AI-assisted chat window when it comes up during your online shopping? Among retail executives: In your opinion, how interested are consumers in using the AI-assisted chat window when shopping online? To what extent do you agree or disagree with the following statement? The use of AI-assisted online chat during the shopping experience is meeting customer's needs.

MILLENNIALS ARE MORE LIKELY TO USE AI-ASSISTED CHAT

Generational Differences:
Almost half of Millennials (46%) use AI-assisted chat windows some or all of the time while online shopping.

Generational Differences:
More than 4 in 5 Boomers (84%) have rarely or never used AI-assisted chat windows.

FREQUENCY CONSUMERS USE AI-ASSISTED CHAT WINDOWS	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
ALL THE TIME	7%	7%	7%	4%	9%	12%	8%	2%
SOME OF THE TIME	23%	23%	22%	22%	22%	34%	24%	15%
RARELY	29%	29%	25%	26%	25%	25%	32%	33%
I NEVER USE THIS	42%	41%	46%	48%	44%	29%	37%	51%

Among consumers: How often do you use the AI-assisted chat window when it comes up during your online shopping? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

AI-ENABLED INTERACTIONS ARE DAMAGING TO CONSUMER SHOPPING EXPERIENCE

Despite retailers believing that they are meeting consumer needs, the majority of consumers (66%) report that they had a negative reaction the last time an AI-assisted chat window popped up on the their screen. For these consumers, AI-enabled interactions are actually more damaging to the shopping experience than helpful.

HOW CONSUMERS FELT THE LAST TIME THEY WERE PROMPTED BY AN AI-ASSISTED CHAT WHILE ONLINE SHOPPING
AMONG CONSUMERS WHO HAVE BEEN PROMPTED BY AN AI-ASSISTED CHAT, n=830

49% Frustrated

28% Excited

17% Confused

6% Other

Among consumers who have been prompted by an AI-assisted chat: The last time that you were prompted by an AI-assisted chat while shopping online, which of the following best describes how you felt when you saw this message?

AI-ASSISTED CHAT IS MOST DAMAGING TO BOOMERS' CUSTOMER EXPERIENCE

Generational Differences:
Almost 2 in 3 (63%) Boomers were frustrated the last time they were prompted by an AI-assisted chat window.

CONSUMERS FEELINGS WHEN PROMPTED BY A CHAT WINDOW AMONG CONSUMERS WHO HAVE BEEN PROMPTED BY AN AI-ASSISTED CHAT	**TOTAL** N=830	**GEN Z** n=84^	**MILLENNIAL** n=261	**GEN X** n=203	**BOOMER** n=248
FRUSTRATED	49%	42%	37%	50%	63%
EXCITED	28%	32%	40%	25%	17%
CONFUSED	17%	23%	21%	16%	12%
OTHER	6%	4%	2%	9%	8%

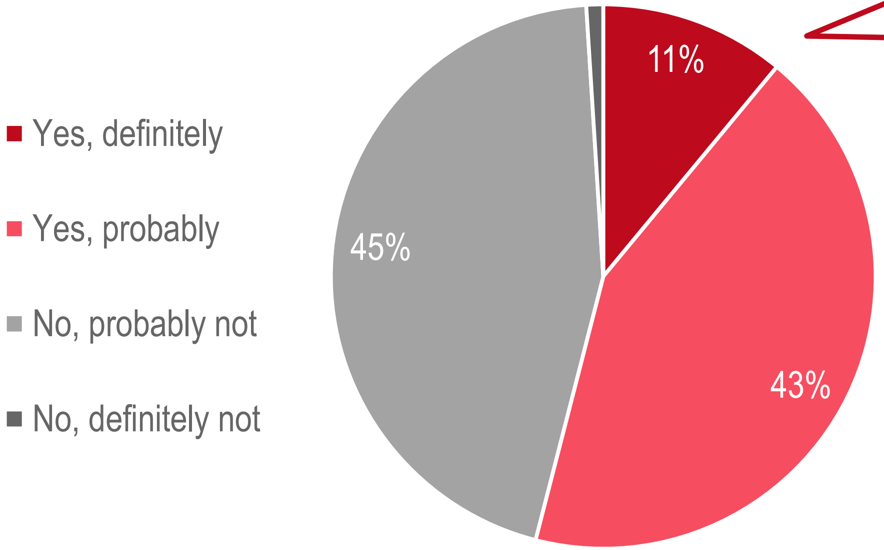
Among consumers who have been prompted by an AI-assisted chat: The last time that you were prompted by an AI-assisted chat while shopping online, which of the following best describes how you felt when you saw this message? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level. ^Small base size, findings are directional.

RETAILERS ADMIT THEIR STORE STAFF IS NOT EQUIPPED TO DELIVER A MORE PERSONALIZED EXPERIENCE

Only 11% of retailers are "definitely" confident that their staff has the tools and information needed to give consumers a personalized experience. Nearly half (46%) simply admit they do not.

RETAIL EXECUTIVE STAFF HAS TOOLS TO PROVIDE PERSONALIZATION

AMONG RETAIL EXECUTIVES, N=400



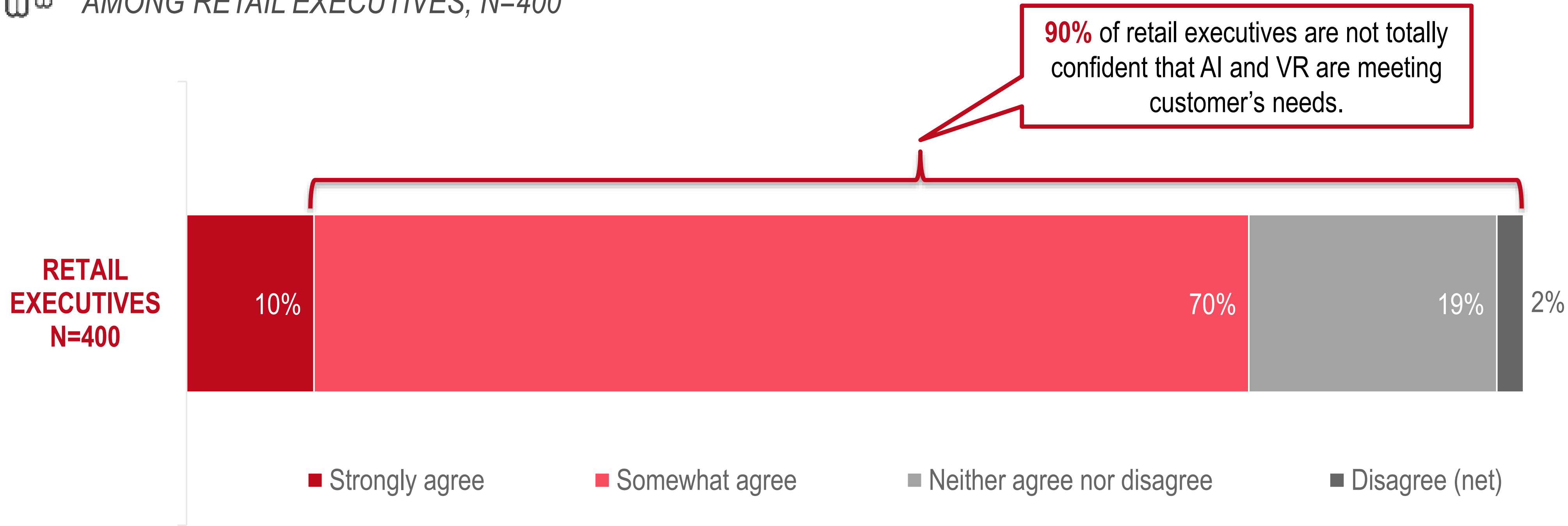
89% of retailers admit that they are not totally confident their store staff has the tools and information needed to give consumers a personalized experience.

Among retail executives: In your stores, do you feel your staff has the tools and information needed to give consumers a "personalized" experience?

RETAILERS ADMIT THERE IS WORK TO BE DONE IN USING TECHNOLOGY TO MEET CONSUMER NEEDS

The majority of retailers (90%) are not totally confident that the use of advanced technologies such as AI or VR to customize the shopping experience is meeting consumers' needs.

EXTENT RETAIL EXECUTIVES AGREE THAT USING AI AND VR TO CUSTOMIZE MEETS CUSTOMER NEEDS
AMONG RETAIL EXECUTIVES, N=400

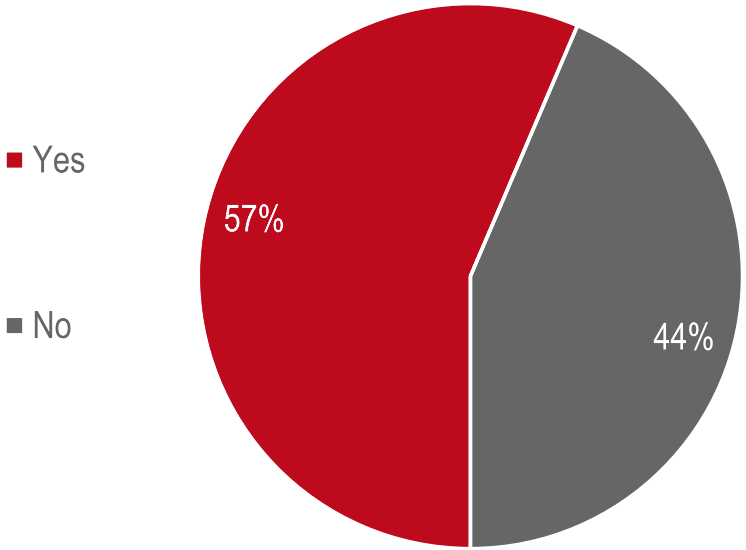


Among retail executives: To what extent do you agree or disagree with the following statement? The use of advanced technologies like AI and VR to customize the shopping experience is meeting customer's needs.

RETAILERS SHOW THERE IS DIFFICULTY IN TAILORING TO GENERATION

More than 2 in 5 (44%) retailers admit they have not made progress in tailoring the in-store shopping experience to cater to different generations. Among those who have, nearly 1 in 3 (31%) admit that they have not caught up to their ability to personalize online.

RETAIL EXECUTIVES MAKING PROGRESS TAILORING SHOPPING BY GENERATION
AMONG RETAIL EXECUTIVES, N=400



RETAIL ABILITY TO CATER TO DIFFERENT GENERATIONS IN-STORE VS. ONLINE
AMONG RETAIL EXECUTIVES WHOSE COMPANIES HAVE MADE PROGRESS, n=226

MORE ABILITY ONLINE	31%
MORE ABILITY IN-STORE	12%
THE SAME	56%

Among retail executives: Would you say that your company has made progress in tailoring the in-store experience to cater to different generations? (Gen. Z, Millennials, Boomers, etc.) Among retail executives whose companies have made progress: Would you say that your progress catering to the in-store shopping experience by generation is more than, less than, or about the same as your company's ability to cater to different generations online?

THE IDEAL SHOPPING EXPERIENCE

ORACLE NETSUITE

RETAILERS ARE OPTIMISTIC ABOUT THE EFFECT VR TECH WILL HAVE ON SALES AND FOOT TRAFFIC

Nearly all retailers (98%) believe that VR or AI will increase foot traffic, by 12% more on average. Additionally, 4 in 5 (79%) feel that having this technology in their stores will increase sales.

HAVING VR TECHNOLOGY IN MY STORES WOULD…
AMONG RETAIL EXECUTIVES, N=400

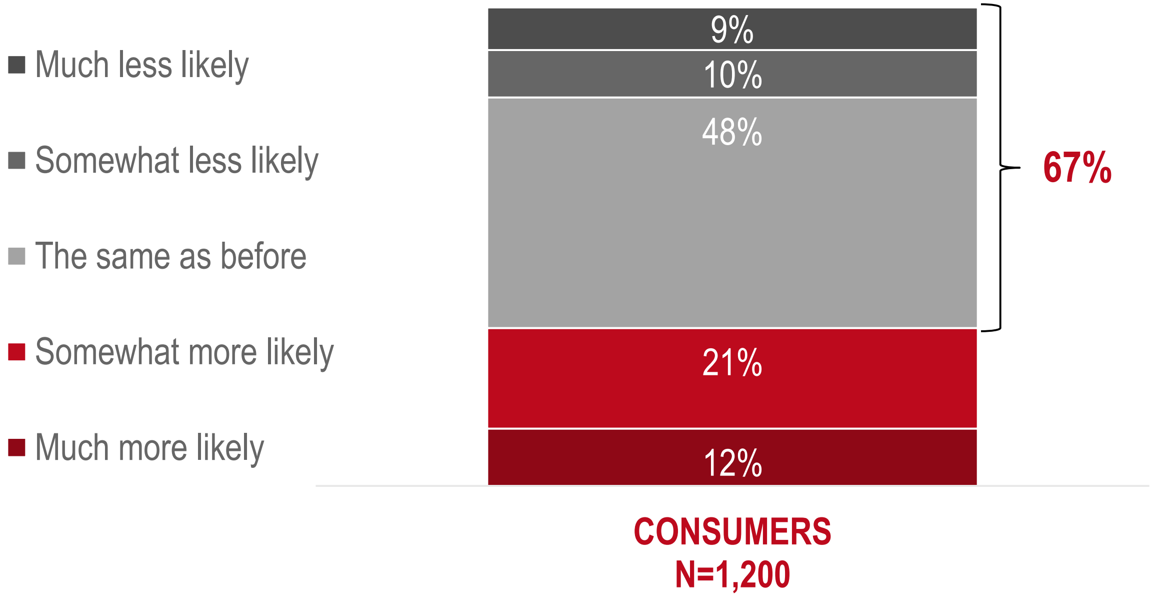
Among retail executives: If your store invested in new AI or VR technology, how much more – if any – foot traffic would you expect to see as a result? How much, if at all, would you expect your sales conversions to change if your actual physical store utilized (or incorporated) VR technology? Having VR technology in my stores would…

HOWEVER, VR AND AI HAVE MINIMAL IMPACT ON CONSUMER DECISIONS

Investing in VR or AI may drive some foot traffic into the store, but retailers are over estimating the effect. The majority of consumers (67%) are not any more likely to walk into a retail store that features VR and AI – including roughly 1 in 5 (19%) who would be *less* likely. Further, only 14% of consumers feel that VR has significant influence on their purchase decisions.

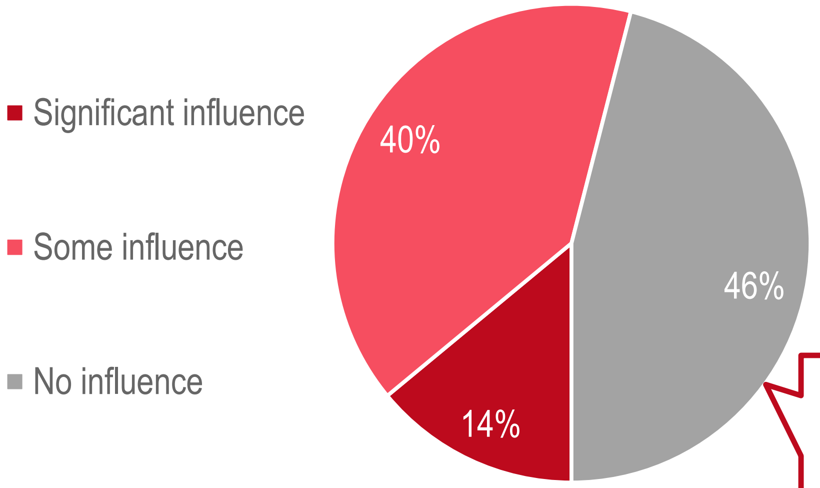
LIKELIHOOD OF WALKING INTO A RETAIL STORE IF IT HAS VR AND AI FEATURED

AMONG CONSUMERS, N=1,200



INFLUENCE OF VR ON CONSUMER PURCHASE DECISION

AMONG CONSUMERS, N=1,200



Almost half **(46%)** of consumers feel that VR has **no influence at all** on their purchase decision.

Among consumers: How much more or less likely – if at all – would you be to walk into a retail store that has AI and VR technology prominently featured? Let's assume VR technology, such as a headset to experience or test out the product, is set up in the store. How much influence, if any, would this type of technology have on your purchase decision?

MILLENNIALS ARE MOST LIKELY TO BE INTERESTED IN USING ADVANCED TECHNOLOGIES, BOOMERS ARE LEAST

CONSUMERS' LIKELIHOOD OF ENTERING STORE WITH AI AND VR TECH	TOTAL N=1,200	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MUCH MORE LIKELY	12%	12%	22%	14%	4%
SOMEWHAT MORE LIKELY	21%	26%	28%	20%	16%
THE SAME AS BEFORE	48%	40%	37%	49%	57%
SOMEWHAT LESS LIKELY	10%	11%	9%	8%	12%
MUCH LESS LIKELY	9%	10%	5%	9%	11%

Generational Differences:
4 in 5 (80%) Boomers are **just as likely or less likely** to enter a store with VR and AI tech compared to a store without. Half of Millennials (50%) are **more likely** to go into a retail store if it prominently features AI and VR technology.

INFLUENCE OF VR ON CONSUMER PURCHASE DECISION	TOTAL N=1,200	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
SIGNIFICANT INFLUENCE	14%	14%	28%	16%	4%
SOME INFLUENCE	40%	58%	41%	38%	37%
NO INFLUENCE	46%	28%	31%	46%	59%

Generational Differences:
Almost 3 in 5 Boomers (59%) feel VR would **have no influence** on their purchase decisions compared to less than one third of Gen Z (28%) and Millennial (31%) consumers.

Among consumers: How much more or less likely – if at all – would you be to walk into a retail store that has AI and VR technology prominently featured? Let's assume VR technology, such as a headset to experience or test out the product, is set up in the store. How much influence, if any, would this type of technology have on your purchase decision? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

CONSUMERS WANT A RETAIL STORE THAT IS SIMPLE AND STREAMLINED

The most appealing retail store of the future is one that offers a simplified, streamlined shopping experience. 70% of consumers selected at least one feature that simplifies their shopping experience, such as having options that are consistent with online (36%) or having simpler store layouts (35%).

FEATURES ATTRACTING CONSUMERS TO PHYSICAL STORES INSTEAD OF ONLINE
AMONG CONSUMERS, N=1,200

Among consumers: Which of the following features would make you want to shop in a physical store instead of shopping online?

GEN ZERS MOST INTERESTED IN SIMPLICITY

Generational Differences:
Gen Z is significantly more likely to choose simpler store layouts, in store kiosks, staff with iPads, and getaways (juice bars, in-store nail salons) than other generations.

FEATURES ATTRACTING CONSUMERS TO PHYSICAL STORES INSTEAD OF ONLINE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
OPTIONS CONSISTENT WITH ONLINE	36%	36%	32%	33%	28%	36%	35%	40%
SIMPLER STORE LAYOUTS	35%	36%	24%	41%	49%	30%	34%	38%
STAFF ORDERS ON MOBILE DEVICE	29%	29%	20%	36%	38%	32%	23%	27%
IN-STORE KIOSKS	23%	23%	21%	22%	34%	26%	23%	19%
SMALL STORE WITH SPECIFIC PRODUCTS	19%	19%	14%	22%	17%	21%	20%	18%
DIGITAL SIGNAGE WITH PROMOTIONS	18%	18%	12%	23%	22%	21%	21%	13%
A FOCUS ON SERVICES	16%	15%	11%	30%	16%	22%	18%	11%
A GETAWAY	16%	17%	12%	14%	31%	22%	15%	9%
NONE OF THESE	18%	16%	35%	20%	10%	11%	22%	22%

Among consumers: Which of the following features would make you want to shop in a physical store instead of shopping online? *Pink shaded data points highlight statistically significant differences across sub-audiences at the 95% confidence level.

SPECIFIC TECHNOLOGIES CONSUMERS PRIORITIZE POINT TO SIMPLICITY

In addition to the in-store features that are most attractive to consumers, generally, consumers most want to utilize the specific technologies that make their experience more simple, such as self-checkout kiosks (38%).

TECHNOLOGICAL ADVANCEMENTS CONSUMERS WOULD MOST WANT TO UTILIZE WHILE SHOPPING IN STORE OR ONLINE
AMONG CONSUMERS WHO WOULD UTILIZE TECHNOLOGICAL ADVANCEMENTS, N=1,117

38% Self-Checkout Kiosks

23% Virtual Reality Try-On

15% Mobile Pay

11% Facial Recognition

8% Drone Delivery

5% Robots And Chatbots

Among consumers who would utilize technological advancements: The next time you go shopping in store or online, which of the following technological advancements would you most want to utilize?

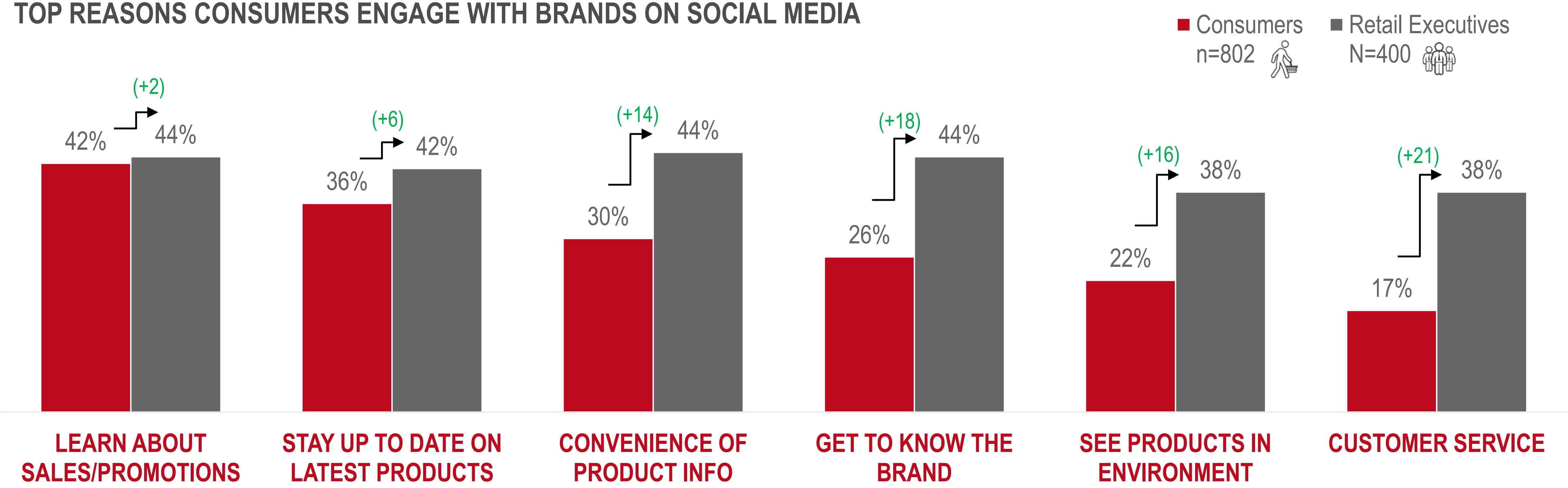
BRAND RELATIONSHIPS

ORACLE
NETSUITE

CONSUMERS ENGAGE WITH BRANDS IN ORDER TO LEARN ABOUT SALES OR NEW PRODUCTS

Retailers are unclear on the top reasons why consumers engage with brands. While 44% of retailers feel that “getting to know the brand” is one of consumers top 3 reasons, only 26% of consumers report this. Instead, most consumers engage with brands to find sales and promotions (42%), or learn about new products (36%).

TOP REASONS CONSUMERS ENGAGE WITH BRANDS ON SOCIAL MEDIA



Among consumers who engage with brands on social media: Which of the following – if any – are the top reasons why you engage with brands on social media? Among retail executives: In your opinion, which of the following – if any – are the top reasons why consumers engage with brands on social media?

GEN Z IS MORE LIKELY TO ENGAGE WITH SOCIAL MEDIA IN ORDER TO GET TO KNOW THE BRAND MORE

Generational Differences:
Almost 2 in 5 (38%) Gen Z consumers engage with brands on social media to get to know the brand more through posted content.

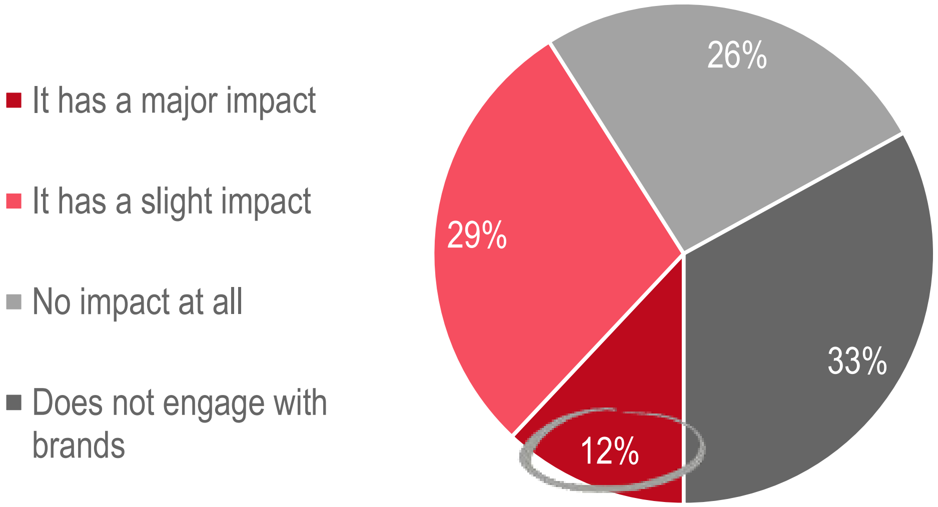
REASONS WHY CUSTOMERS ENGAGE WITH BRANDS ON SOCIAL MEDIA AMONG CONSUMERS WHO ENGAGE WITH BRANDS ON SOCIAL MEDIA	**TOTAL** n=802	**U.S.** n=679	**U.K.** n=58^	**AUS** n=65^	**GEN Z** n=100	**MILLENNIAL** n=287	**GEN X** n=204	**BOOMER** n=177
LEARN ABOUT SALES AND PROMOTIONS	42%	44%	24%	45%	47%	36%	40%	54%
STAY UP TO DATE ON THE LATEST PRODUCTS	36%	35%	36%	35%	43%	36%	37%	31%
CONVENIENCE OF LOOKING UP PRODUCT INFO	30%	30%	22%	29%	33%	30%	33%	24%
GET TO KNOW THE BRAND MORE	26%	27%	14%	28%	38%	25%	27%	21%
SEE PRODUCTS IN INTENDED ENVIRONMENT	22%	23%	14%	20%	37%	26%	16%	17%
INTERACT WITH ONLINE CUSTOMER SERVICE	17%	17%	19%	22%	16%	20%	16%	18%
COMMUNICATE WITH OTHER CONSUMERS	16%	15%	21%	17%	16%	21%	14%	12%
OTHER	0%	0%	3%	-	1%	0%	0%	1%
NONE OF THESE	12%	12%	17%	14%	4%	8%	14%	18%

Among consumers who engage with brands on social media: Which of the following - if any - are the top reasons why you engage with brands on social media? ^Small base size, findings are directional.

ENGAGING WITH BRANDS ON SOCIAL MEDIA DOES NOT TRANSLATE INTO STRONGER BRAND RELATIONSHIPS

Despite consumers engaging with brands on social media more and more, consumers do not necessarily feel they have stronger relationships with brands compared to 5 years ago. While 98% of retailers feel that engaging with customers on social media is important to building relationships, only 12% of consumers feel this has a significant impact.

IMPACT OF SOCIAL MEDIA ENGAGEMENT WITH BRANDS ON THE WAY CONSUMERS THINK OR FEEL ABOUT THE BRAND



Among consumers who engage with brands on social media: How much – if at all – does your social media engagement with brands contribute to the way you think or feel about those brands? Among retail executives: How important is it for retailers to engage with their customers on social media in order to build stronger relationships with them?

YOUNGER GENERATIONS ARE MORE LIKELY TO BUILD RELATIONSHIPS WITH BRANDS

Generational Differences:
More than 3 in 5 Gen Z (65%) and Millennial (62%) consumers say that social media has an impact on their relationship with brands.

SOCIAL MEDIA IMPACT ON CONSUMERS' BRAND RELATIONSHIPS	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
IT HAS A MAJOR IMPACT	12%	13%	9%	10%	20%	21%	12%	3%
IT HAS A SLIGHT IMPACT	29%	30%	20%	29%	45%	41%	27%	18%
IT DOESN'T HAVE AN IMPACT AT ALL	26%	25%	29%	26%	22%	20%	31%	26%
I DO NOT ENGAGE WITH BRANDS ON SOCIAL MEDIA	33%	32%	42%	35%	13%	17%	29%	53%

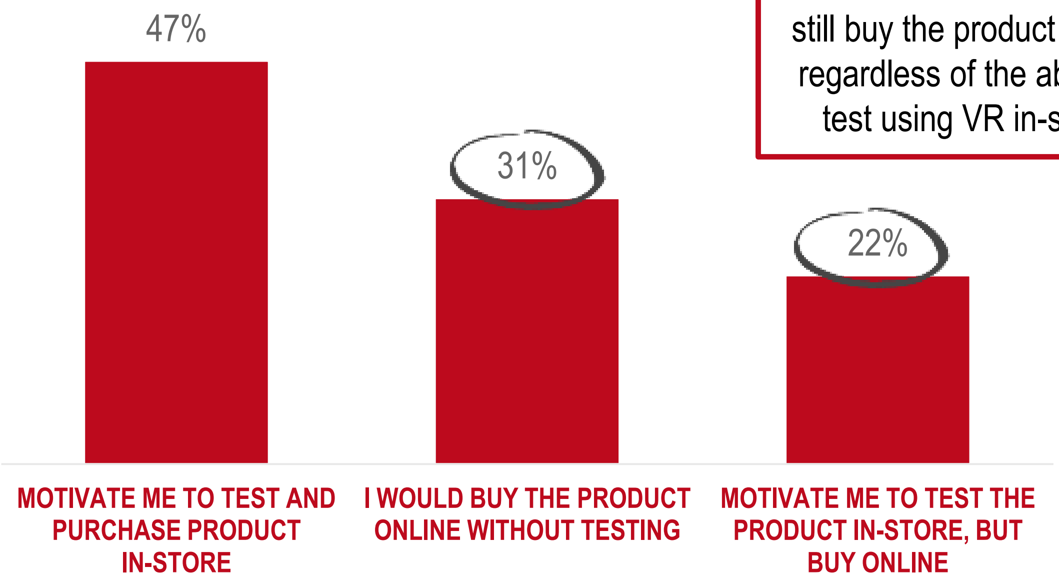
Among consumers: How much - if at all - does your social media engagement with brands contribute to the way you think or feel about those brands?

APPENDIX

VR TECHNOLOGY EFFECT ON PURCHASE BEHAVIOR

VR TECH IN-STORE TO TEST PRODUCTS WOULD…

AMONG CONSUMERS, N=1,200

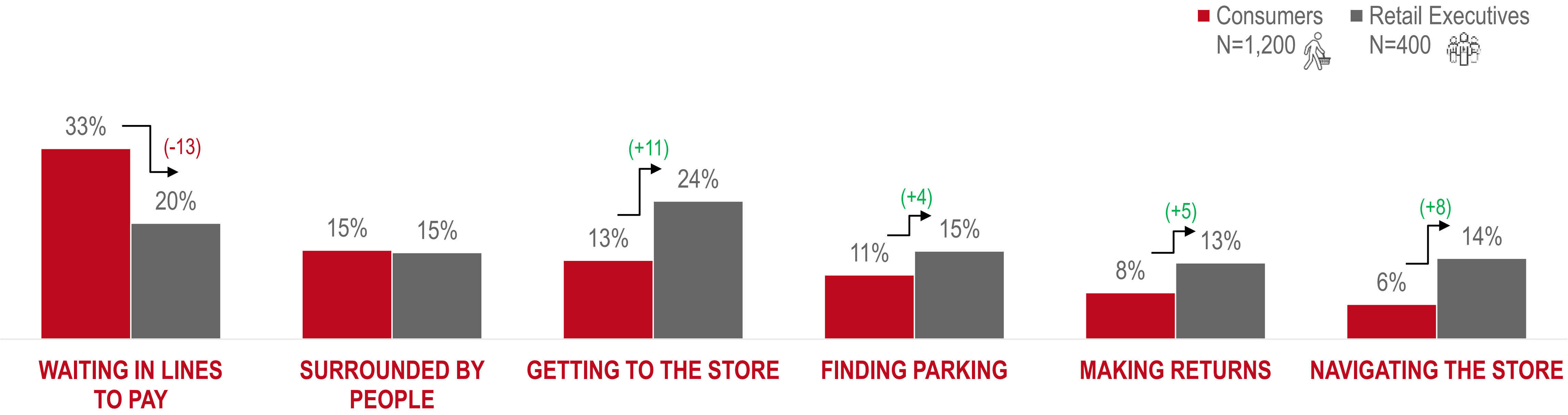


53% of consumers would still buy the product online, regardless of the ability to test using VR in-store.

Among consumers: If a store was equipped with VR technology, such as a headset to experience a product you were interested in purchasing, would this type of technology… Among retail executives: Now, if a consumer was interested in purchasing a product, how much – if at all – would VR technology (such as a headset to experience a product) influence a consumer's decision to purchase the product in-store, rather than online?

BIGGEST PAIN POINTS WITH IN-STORE SHOPPING

CONSUMERS' BIGGEST PAIN POINT WITH IN-STORE SHOPPING



Among consumers: What is the biggest pain point that you associate with going to a physical store to shop? Among retail executives: In your opinion, what is the biggest pain point for consumers when they visit a physical store to shop?

SUB-GROUP BREAKOUTS

THE FUTURE OF BRICK AND MORTAR

ORACLE NETSUITE

PRODUCTS CONSUMERS PREFER TO BUY IN-STORE

ITEMS CONSUMERS PREFER TO PURCHASE IN A PHYSICAL STORE RATHER THAN ONLINE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
GROCERIES	61%	62%	60%	52%	58%	57%	62%	67%
SHOES	50%	50%	51%	47%	50%	50%	46%	55%
CLOTHES	49%	50%	49%	45%	57%	45%	48%	53%
CAR	46%	46%	43%	47%	41%	37%	43%	57%
HOME FURNITURE	42%	42%	34%	44%	32%	36%	42%	50%
ELECTRONICS	28%	28%	27%	28%	33%	34%	21%	26%
HOME GOODS	26%	26%	29%	29%	26%	28%	23%	28%
ACCESSORIES	26%	24%	30%	36%	28%	24%	24%	28%
DISPOSABLE GOODS	25%	25%	31%	23%	28%	24%	22%	27%
RECREATIONAL EQUIPMENT	17%	17%	18%	23%	16%	12%	22%	20%
CHILDREN'S TOYS OR BABY CARE PRODUCTS	13%	12%	14%	19%	14%	19%	13%	9%

Among consumers: Which of the following items – if any – would you prefer to purchase in a physical store rather than online?

PRODUCTS RETAIL EXECUTIVES THINK CONSUMERS PREFER TO BUY IN-STORE

RETAIL EXECUTIVES' THOUGHTS ON ITEMS CONSUMERS PREFER TO PURCHASE IN A PHYSICAL STORE OVER ONLINE	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
CAR	71%	67%	74%	75%
RECREATIONAL EQUIPMENT	50%	44%	52%	58%
GROCERIES	34%	38%	31%	29%
ELECTRONICS	29%	32%	32%	20%
HOME FURNITURE	24%	26%	19%	24%
SHOES	22%	27%	17%	16%
CLOTHES	19%	21%	18%	15%
DISPOSABLE GOODS	14%	14%	15%	14%
HOME GOODS	13%	13%	13%	13%
ACCESSORIES	13%	14%	12%	10%
CHILDREN'S TOYS OR BABY CARE PRODUCTS	6%	8%	5%	2%

Among retail executives: Which of the following items – if any – do you feel most consumers prefer to purchase in physical stores rather than online?

CONSUMERS' THOUGHTS ON THE RETAIL ENVIRONMENT COMPARED TO FIVE YEARS AGO

CONSUMERS' THOUGHTS ON RETAIL ENVIRONMENT COMPARED TO 5 YEARS AGO	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
DEFINITELY MORE INVITING	15%	15%	15%	22%	17%	24%	17%	9%
PROBABLY MORE INVITING	30%	31%	19%	35%	39%	33%	23%	27%
STAYED EXACTLY THE SAME	35%	34%	49%	36%	30%	31%	39%	38%
PROBABLY LESS INVITING	15%	17%	13%	5%	12%	9%	17%	21%
DEFINITELY LESS INVITING	4%	4%	4%	2%	2%	3%	4%	6%

Among consumers: Compared to 5 years ago, would you say the overall environments in most of the retail stores you shop at today have become more or less inviting for consumers like yourself?

RETAIL EXECUTIVES ON IF THE RETAIL ENVIRONMENT IS MORE INVITING THAN FIVE YEARS AGO

RETAIL EXECUTIVES' THOUGHTS ON RETAIL ENVIRONMENT COMPARED TO 5 YEARS AGO	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
DEFINITELY MORE INVITING	21%	26%	15%	17%
PROBABLY MORE INVITING	52%	49%	53%	58%
STAYED EXACTLY THE SAME	19%	18%	20%	18%
PROBABLY LESS INVITING	9%	8%	12%	7%
DEFINITELY LESS INVITING	0%	1%	-	-

Among retail executives: Compared to 5 years ago, would you say the overall environments in most retail stores have become more or less inviting for consumers generally?

CONSUMERS' EMOTIONS WHEN WALKING INTO STORES

EMOTIONS CONSUMERS FELT THE LAST TIME THEY WALKED INTO A STORE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
CONFIDENT	39%	40%	32%	37%	41%	32%	34%	48%
ANXIOUS	24%	26%	15%	21%	23%	23%	25%	26%
SATISFIED	24%	24%	17%	28%	30%	26%	22%	21%
EXCITED	24%	24%	19%	28%	32%	29%	24%	18%
STRESSED	19%	19%	20%	13%	23%	20%	20%	17%
ALONE	16%	16%	14%	19%	14%	14%	14%	20%
OVERWHELMED	15%	14%	14%	19%	27%	18%	10%	11%
CONFUSED	6%	6%	5%	9%	10%	8%	6%	4%

Among consumers: The last time you walked into a store to purchase something in-person rather than online, (such as clothes, a gift, or something for your home) which of the following emotions – if any – did you feel while in the store?

RETAIL EXECUTIVES' PRIORITY OF CUSTOMER CONFIDENCE IN STORES

IMPORTANCE OF STORE STAFF AND ENVIRONMENT MAKING CUSTOMERS FEEL "CONFIDENT"	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
EXTREMELY IMPORTANT (#1 THING)	31%	33%	33%	27%
VERY IMPORTANT	46%	44%	44%	52%
SOMEWHAT IMPORTANT	20%	19%	20%	20%
UNSURE	2%	3%	2%	1%
NOT VERY IMPORTANT	1%	2%	1%	-
NOT AT ALL IMPORTANT	0%	1%	-	-

Among retail executives: For your stores, how important – if at all – is it for your store staff and the store environment overall to make customers feel "confident" when they come in? Meaning, confident they are making the right choice by physically seeing and touching the products before buying them.

HOW WELCOMED STAFF INTERACTION IS AMONG CONSUMERS

CONSUMERS' FEELINGS IF STORE STAFF SPENT MORE TIME INTERACTING WITH THEM	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MUCH MORE WELCOMED	19%	20%	11%	20%	22%	29%	16%	14%
SOMEWHAT MORE WELCOMED	27%	27%	20%	26%	18%	27%	28%	30%
EXACTLY THE SAME	26%	25%	39%	25%	18%	21%	25%	29%
SOMEWHAT MORE ANNOYED	22%	22%	22%	20%	33%	17%	23%	20%
MUCH MORE ANNOYED	7%	7%	8%	9%	9%	6%	8%	7%

Among consumers: If the store staff spent more time interacting with you from the moment you walked into the store, would you feel more welcomed or more annoyed?

RETAIL EXECUTIVES' PERSPECTIVE ON THE LEVEL OF STAFF INTERACTION CONSUMERS DESIRE

RETAIL EXECUTIVES' THOUGHTS ON CONSUMERS' FEELINGS IF STORE STAFF SPENT MORE TIME INTERACTING WITH THEM	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
MUCH MORE WELCOMED	16%	17%	15%	13%
SOMEWHAT MORE WELCOMED	64%	61%	62%	74%
EXACTLY THE SAME	18%	21%	20%	11%
SOMEWHAT MORE ANNOYED	2%	1%	3%	2%
MUCH MORE ANNOYED	1%	1%	-	-

Among retail executives: Would typical consumers today feel more welcomed or annoyed if store staff spent more time interacting with the consumer from the moment he or she walked in?

CONSUMERS' EXPECTED IN-STORE SHOPPING IN 2019 COMPARED TO LAST YEAR

CONSUMERS' THOUGHTS ON SHOPPING IN-STORE IN 2019	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MUCH MORE SHOPPING IN STORES	15%	16%	6%	12%	25%	23%	16%	6%
SOMEWHAT MORE SHOPPING IN STORES	13%	13%	13%	21%	17%	20%	13%	7%
ABOUT THE SAME AMOUNT OF SHOPPING IN STORES	58%	57%	69%	53%	51%	43%	56%	71%
SOMEWHAT LESS SHOPPING IN STORES	11%	11%	8%	12%	5%	10%	12%	11%
MUCH LESS SHOPPING IN STORES	4%	4%	4%	2%	1%	4%	3%	5%

Among consumers: Compared to last year, how much more or less shopping do you plan to do in stores in 2019?

RETAIL EXECUTIVE EXPECTATIONS OF IN-STORE SHOPPING IN 2019

RETAIL EXECUTIVES' EXPECTATIONS OF CONSUMERS SHOPPING IN-STORE IN 2019	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
MUCH MORE SHOPPING IN STORES	4%	7%	1%	2%
SOMEWHAT MORE SHOPPING IN STORES	46%	37%	60%	52%
ABOUT THE SAME AMOUNT OF SHOPPING IN STORES	39%	45%	29%	38%
SOMEWHAT LESS SHOPPING IN STORES	10%	11%	10%	8%
MUCH LESS SHOPPING IN STORES	1%	1%	-	-

Among retail executives: Compared to last year, how much more or less shopping do you expect consumers to do in stores in 2019?

PERSONALIZATION USING ADVANCED TECHNOLOGIES

WHERE CONSUMERS FEEL THEY RECEIVE A PERSONALIZED SHOPPING EXPERIENCE

WHERE CONSUMERS FEEL THEY ARE PROVIDED WITH A PERSONALIZED SHOPPING EXPERIENCE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
ONLY IN-STORE	24%	24%	20%	31%	23%	25%	19%	24%
ONLY ONLINE	19%	19%	20%	13%	32%	26%	24%	7%
BOTH	20%	21%	12%	15%	23%	23%	19%	16%
NEVER	38%	36%	48%	41%	23%	26%	38%	52%

Among consumers: When shopping, do you feel that you are provided with a personalized shopping experience?

COMPANIES HAVE TAILORED SHOPPING BY GENERATION

RETAIL EXECUTIVES WHOSE COMPANIES HAVE MADE PROGRESS IN TAILORING SHOPPING BY GENERATION	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
YES	57%	60%	60%	46%
NO	44%	40%	40%	54%

RETAIL EXECUTIVES' PROGRESS ON CATERING TO DIFFERENT GENERATIONS IN-STORE COMPARED TO ONLINE AMONG RETAIL EXECUTIVES WHO HAVE MADE PROGRESS	TOTAL n=226	U.S. n=120	U.K. n=60^	AUS n=46^
MORE THAN ONLINE	12%	16%	10%	7%
ABOUT THE SAME AS ONLINE	56%	56%	58%	54%
LESS THAN ONLINE	31%	28%	32%	39%

Among retail executives: Would you say that your company has made progress in tailoring the in-store experience to cater to different generations? (Gen Z, Millennials, Boomers, etc.) Among retail executives who have made progress: Would you say that your progress catering to the in-store shopping experience by generation is more than, less than, or about the same as your company's ability to cater to different generations online? ^Small base size, findings are directional.

CONSUMER WILLINGNESS TO PAY ADDITIONAL FOR IN-STORE PERSONALIZATION

CONSUMERS' WILLINGNESS TO PAY MORE FOR IN-STORE PERSONALIZATION	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
YES, DEFINITELY	15%	17%	9%	10%	21%	28%	16%	5%
YES, PROBABLY	27%	27%	27%	30%	29%	35%	27%	20%
NO, PROBABLY NOT	41%	42%	37%	36%	44%	28%	38%	52%
NO, DEFINITELY NOT	17%	15%	27%	24%	6%	9%	19%	23%

Among consumers: Would you be willing to pay more for a product if a knowledgeable sales associate could personalize your shopping experience in-store?

RETAIL STAFF'S ABILITY TO PROVIDE PERSONALIZATION IN STORES

RETAIL EXECUTIVES' STORE STAFF HAVE TOOLS TO PROVIDE PERSONALIZATION	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
YES, DEFINITELY	11%	18%	6%	3%
YES, PROBABLY	43%	43%	45%	43%
NO, PROBABLY NOT	45%	39%	48%	54%
NO, DEFINITELY NOT	1%	1%	1%	-

Among retail executives: In your stores, do you feel your staff has the tools and information needed to give consumers a "personalized" experience?

CONSUMERS' FEELINGS ON INCREASED PERSONALIZATION THROUGH TECHNOLOGY WHILE SHOPPING

CONSUMERS' VIEW ON TECHNOLOGY IMPROVING PERSONALIZATION	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MAKES ME UNCOMFORTABLE	58%	57%	61%	58%	51%	51%	57%	64%
IMPROVES MY OVERALL EXPERIENCE	42%	43%	39%	42%	49%	49%	43%	36%

Among consumers: Which of the following is closest to your view when it comes to technology improving personalization for your shopping experience?

HOW RETAIL STAFF AND TECHNOLOGY HELPS TO WELCOME CONSUMERS

WAYS RETAIL EXECUTIVES THINK STORE STAFF AND TECHNOLOGY HAS MADE CUSTOMERS FEEL WELCOME	**TOTAL** N=400	**U.S.** n=200	**U.K.** n=100	**AUS** n=100
RECOMMENDATIONS ON PRODUCTS	47%	41%	52%	52%
SAVED PERSONAL INFO	43%	43%	47%	40%
STAFF APPROACHES	41%	43%	39%	41%
LOOK UP PAST PURCHASES	41%	41%	40%	41%
STAFF GREETS BY NAME	37%	39%	40%	32%
KNOW CUSTOMER'S FINANCIAL INFO	32%	31%	29%	36%

Among retail executives: In what ways do you feel your store staff and the technology in the store environment has made customers feel welcome?

CONSUMERS' REACTIONS TO RETAIL WEBSITES KNOWING THEIR NAME

CONSUMERS' FEELINGS WHEN RETAIL WEBSITE KNOWS THEIR NAME AND WHO THE ARE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
WELCOME	38%	39%	32%	30%	40%	43%	36%	35%
VALUED	23%	23%	25%	16%	26%	29%	22%	18%
UNCOMFORTABLE	21%	21%	20%	21%	28%	19%	16%	23%
CREEPED OUT	18%	18%	19%	21%	19%	20%	24%	14%
CONCERNED	17%	17%	14%	23%	19%	19%	16%	17%
COMMODITIZED	10%	10%	14%	11%	14%	13%	12%	6%
AFRAID	5%	5%	4%	7%	10%	6%	7%	2%

Among consumers: When you go online to a retailer's website and the site knows your name and who you are already, how does that make you feel?

RETAIL EXECUTIVES' THOUGHTS ON HOW SUCCESSFULLY AI AND VR MEET CONSUMER NEEDS

EXTENT RETAIL EXECUTIVES AGREE THAT USING AI AND VR TO CUSTOMIZE SHOPPING MEETS CUSTOMER NEEDS	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
STRONGLY AGREE	10%	16%	3%	3%
SOMEWHAT AGREE	70%	64%	76%	76%
NEITHER AGREE NOR DISAGREE	19%	17%	21%	20%
SOMEWHAT DISAGREE	2%	4%	-	1%
STRONGLY DISAGREE	0%	1%	-	-

Among retail executives: To what extent do you agree or disagree with the following statement? The use of advanced technologies like AI and VR to customize the shopping experience is meeting customer's needs.

FREQUENCY CONSUMERS UTILIZE AI-ASSISTED CHAT

FREQUENCY CONSUMERS USE AI-ASSISTED CHAT WINDOWS	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
ALL THE TIME	7%	7%	7%	4%	9%	12%	8%	2%
SOME OF THE TIME	23%	23%	22%	22%	22%	34%	24%	15%
RARELY	29%	29%	25%	26%	25%	25%	32%	33%
NEVER USE THIS	42%	41%	46%	48%	44%	29%	37%	51%

Among consumers: How often do you use the AI-assisted chat window when it comes up during your online shopping?

RETAIL EXECUTIVES' PERSPECTIVE ON CONSUMER INTEREST IN AI-ASSISTED CHAT WINDOWS

RETAIL EXECUTIVES' PERSPECTIVE ON CONSUMER INTEREST IN AI-ASSISTED CHAT WINDOWS	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
VERY INTERESTED	13%	19%	7%	8%
SOMEWHAT INTERESTED	74%	65%	81%	83%
NOT VERY INTERESTED	13%	15%	12%	9%
NOT INTERESTED AT ALL	1%	2%	-	-

Among retail executives: In your opinion, how interested are consumers in using the AI-assisted chat window when shopping online?

CONSUMERS' REACTIONS TO AN AI-ASSISTED CHAT PROMPT

CONSUMERS' FEELINGS WHEN PROMPTED BY A CHAT WINDOW	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
I WAS FRUSTRATED BECAUSE IT DISRUPTED MY SHOPPING EXPERIENCE	34%	35%	26%	36%	30%	28%	35%	42%
I WAS EXCITED BECAUSE THE CHAT OFFERED TO HELP ME	19%	20%	18%	15%	23%	30%	18%	11%
I WAS CONFUSED BECAUSE I WAS NOT SURE WHAT IT WAS OR WHAT IT WOULD DO	12%	12%	11%	10%	17%	16%	11%	8%
OTHER	4%	5%	4%	3%	3%	2%	6%	5%
I HAVE NEVER BEEN PROMPTED BY AI-ASSISTED ONLINE CHAT	31%	29%	41%	36%	27%	24%	30%	34%

Among consumers: The last time that you were prompted by an AI-assisted chat while shopping online, which of the following best describes how you felt when you saw this message?

HOW SUCCESSFUL RETAIL EXECUTIVES THINK AI-ASSISTED CHAT WINDOWS ARE IN MEETING SHOPPERS' NEEDS

RETAIL EXECUTIVES' OPINION ON IF CHAT WINDOWS ARE MEETING CUSTOMERS' NEEDS	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
STRONGLY AGREE	15%	21%	5%	13%
SOMEWHAT AGREE	64%	56%	73%	69%
NEITHER AGREE NOR DISAGREE	17%	18%	18%	16%
SOMEWHAT DISAGREE	4%	6%	4%	2%

Among retail executives: To what extent do you agree or disagree with the following statement? The use of AI-assisted online chat during the shopping experience is meeting customer's needs.

THE IDEAL SHOPPING EXPERIENCE

ORACLE NETSUITE

AI AND VR INFLUENCE ON CONSUMERS' DECISION TO WALK INTO A RETAIL STORE

CONSUMERS' LIKLIHOOD OF ENTERING A STORE WITH AI AND VR TECH	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MUCH MORE LIKELY	12%	13%	7%	9%	12%	22%	14%	4%
SOMEWHAT MORE LIKELY	21%	21%	18%	23%	26%	28%	20%	16%
THE SAME AS BEFORE	48%	46%	60%	56%	40%	37%	49%	57%
SOMEWHAT LESS LIKELY	10%	10%	9%	8%	11%	9%	8%	12%
MUCH LESS LIKELY	9%	10%	6%	4%	10%	5%	9%	11%

Among consumers: How much more or less likely - if at all - would you be to walk into a retail store that has AI and VR technology prominently featured?

AI AND VR EXPECTED IMPACT ON FOOT TRAFFIC

EXPECTED INCREASE IN FOOT TRAFFIC AFTER INVESTING IN AI AND VR TECH	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
LESS THAN 10%	58%	49%	70%	66%
10% OR MORE	42%	52%	30%	34%

Among retail executives: If your store invested in new AI or VR technology, how much more - if any - foot traffic would you expect to see as a result?

VR TECHNOLOGY IMPACT ON CONSUMERS' PURCHASING DECISIONS

INFLUENCE VR TECH WOULD HAVE ON PURCHASING DECISIONS	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
SIGNIFICANT INFLUENCE	14%	15%	11%	14%	14%	28%	16%	4%
SOME INFLUENCE	40%	41%	31%	41%	58%	41%	38%	37%
NO INFLUENCE	46%	44%	58%	45%	28%	31%	46%	59%

Among consumers: Let's assume VR technology, such as a headset to experience or test out the product, is set up in the store. How much influence, if any, would this type of technology have on your purchase decision?

EXPECTED SALES CONVERSIONS AFTER INCORPORATING VR TECH INTO PHYSICAL STORES

EXPECTED SALES CONVERSIONS FROM USING VR TECHNOLOGY IN-STORE	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
SIGNIFICANTLY INCREASE SALES	9%	15%	3%	3%
SLIGHTLY INCREASE SALES	71%	67%	74%	75%
NOT HAVE AN IMPACT ON SALES	19%	18%	22%	19%
SLIGHTLY DECREASE SALES	1%	1%	1%	3%
SIGNIFICANTLY DECREASE SALES	0%	1%	-	-

Among retail executives: How much, if at all, would you expect your sales conversions to change if your actual physical store utilized (or incorporated) VR technology? Having VR technology in my stores would…

FACTORS DRIVING CONSUMERS TO SHOP IN-STORE RATHER THAN ONLINE

FEATURES ATTRACTING CONSUMERS TO PHYSICAL STORES INSTEAD OF ONLINE	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
PRODUCT OPTIONS CONSISTENT WITH ONLINE	36%	36%	32%	33%	28%	36%	35%	40%
SIMPLER STORE LAYOUTS	35%	36%	24%	41%	49%	30%	34%	38%
STAFF ORDERS FOR YOU ON MOBILE DEVICE	29%	29%	20%	36%	38%	32%	23%	27%
IN-STORE KIOSKS	23%	23%	21%	22%	34%	26%	23%	19%
SMALL STORE FOCUSED ON SPECIFIC PRODUCTS	19%	19%	14%	22%	17%	21%	20%	18%
DIGITAL SIGNAGE WITH PROMOTIONS	18%	18%	12%	23%	22%	21%	21%	13%
A FOCUS ONLY ON SERVICES	16%	15%	11%	30%	16%	22%	18%	11%
A GETAWAY	16%	17%	12%	14%	31%	22%	15%	9%
NONE OF THESE	18%	16%	35%	20%	10%	11%	22%	22%

Among consumers: Which of the following features would make you want to shop in a physical store instead of shopping online?

WHERE RETAILERS PLAN TO UPDATE OR INVEST IN THE NEXT FIVE YEARS

FEATURES RETAIL EXECUTIVES HAVE PLANS TO MAKE UPDATES OR INVESTMENTS IN	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
MOBILE APPS	41%	42%	46%	36%
IN-STORE KIOSKS	40%	39%	41%	39%
SMALLER FOOTPRINT STORES	39%	37%	46%	37%
IN-STORE SIDE BUSINESSES	39%	38%	37%	43%
LARGE FLAGSHIP STORE	37%	39%	28%	42%
P.O.P. SIGNAGE	36%	40%	29%	36%
TRAINING SALES STAFF WITH MOBILE DEVICE	35%	36%	37%	33%
NOT MAKING INVESTMENTS IN THESE AREAS	1%	2%	-	1%

Among retail executives: In the next 5 years, which of the following areas – if any – does your company have plans in place to make updates or investments in?

CONSUMERS' MOST DESIRED TECH ADVANCEMENTS WHILE SHOPPING

TECHNOLOGICAL ADVANCES CONSUMERS DESIRE MOST	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
SELF-CHECKOUT KIOSKS	36%	36%	33%	30%	38%	34%	40%	33%
TRYING OUT PRODUCTS USING VIRTUAL REALITY	22%	21%	26%	26%	23%	21%	20%	24%
CHECKOUT VIA MOBILE-PAY	14%	14%	12%	14%	16%	16%	18%	10%
BEING LINKED TO MY LOYALTY PROGRAM BY FACIAL RECOGNITION	10%	10%	6%	12%	7%	9%	9%	12%
ONLINE PURCHASES BEING DELIVERED BY DRONE	7%	7%	5%	10%	12%	13%	4%	5%
ROBOTS OR CHATBOTS TO MAKE PERSONALIZED RECOMMENDATIONS	4%	5%	5%	1%	3%	6%	5%	3%
OTHER	0%	0%	-	-	-	-	0%	-
NONE OF THESE	7%	6%	13%	7%	1%	2%	4%	13%

Among consumers: The next time you go shopping in store or online, which of the following technological advancements would you most want to utilize?

TECH ADVANCEMENTS RETAIL EXECUTIVES BELIEVE ARE MOST WANTED WHILE SHOPPING

RETAIL EXECUTIVE OPINIONS ON WHICH TECHNOLOGICAL ADVANCES CONSUMERS DESIRE MOST	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
TRYING OUT PRODUCTS USING VIRTUAL REALITY	20%	18%	26%	17%
ROBOTS OR CHATBOTS TO MAKE PERSONALIZED RECOMMENDATIONS	20%	22%	18%	18%
CHECKOUT VIA MOBILE-PAY	19%	18%	20%	19%
BEING LINKED TO MY LOYALTY PROGRAM BY FACIAL RECOGNITION	16%	16%	15%	19%
ONLINE PURCHASES BEING DELIVERED BY DRONE	14%	15%	8%	17%
SELF-CHECKOUT KIOSKS	12%	13%	13%	10%

Among retail executives: Which of the following technological advancements do you think consumers would most want to use to enhance their shopping experience?

BRAND RELATIONSHIPS

YOUNGER GENERATIONS ARE MORE LIKELY TO BUILD RELATIONSHIPS WITH BRANDS

SOCIAL MEDIA IMPACT ON CONSUMERS' BRAND RELATIONSHIPS AMONG CONSUMERS WHO ENGAGE WITH BRANDS ON SOCIAL MEDIA	**TOTAL** N=1,200	**U.S.** n=1,000	**U.K.** n=100	**AUS** n=100	**GEN Z** n=115	**MILLENNIAL** n=345	**GEN X** n=289	**BOOMER** n=376
IT HAS A MAJOR IMPACT	18%	19%	16%	15%	23%	26%	17%	7%
IT HAS A SLIGHT IMPACT	44%	44%	34%	45%	52%	50%	39%	38%
IT DOESN'T HAVE AN IMPACT AT ALL	38%	37%	50%	40%	25%	24%	45%	55%

Among consumers: How much - if at all - does your social media engagement with brands contribute to the way you think or feel about those brands?

IMPORTANCE OF USING SOCIAL MEDIA TO CONNECT TO CONSUMERS

IMPORTANCE OF SOCIAL MEDIA TO BUILD CUSTOMER RELATIONSHIPS AMONG RETAIL EXECUTIVES	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
EXTREMELY IMPORTANT (THE #1 THING)	33%	31%	37%	31%
VERY IMPORTANT	41%	42%	41%	40%
SOMEWHAT IMPORTANT	24%	23%	22%	29%
UNSURE	2%	3%	-	-
NOT VERY IMPORTANT	1%	2%	-	-
NOT AT ALL IMPORTANT	-	-	-	-

Among retail executives: How important is it for retailers to engage with their customers on social media in order to build stronger relationships with them?

WHY CONSUMERS ENGAGE WITH BRANDS THROUGH SOCIAL MEDIA

REASONS WHY CUSTOMERS ENGAGE WITH BRANDS ON SOCIAL MEDIA AMONG CONSUMERS WHO ENGAGE WITH BRANDS ON SOCIAL MEDIA	**TOTAL** n=802	**U.S.** n=679	**U.K.** n=58^	**AUS** n=65^	**GEN Z** n=100	**MILLENNIAL** n=287	**GEN X** n=204	**BOOMER** n=177
LEARN ABOUT SALES AND PROMOTIONS	42%	44%	24%	45%	47%	36%	40%	54%
STAY UP TO DATE ON THE LATEST PRODUCTS	36%	35%	36%	35%	43%	36%	37%	31%
CONVENIENCE OF LOOKING UP PRODUCT INFORMATION ON MY PHONE OR TABLET	30%	30%	22%	29%	33%	30%	33%	24%
GET TO KNOW THE BRAND MORE THROUGH POSTED CONTENT	26%	27%	14%	28%	38%	25%	27%	21%
SEE THE PRODUCTS IN THEIR INTENDED ENVIRONMENT	22%	23%	14%	20%	37%	26%	16%	17%
INTERACT WITH ONLINE CUSTOMER SERVICE IF I HAVE A QUICK QUESTION	17%	17%	19%	22%	16%	20%	16%	18%
COMMUNICATE WITH OTHER CONSUMERS OF THE BRAND	16%	15%	21%	17%	16%	21%	14%	12%
OTHER	0%	0%	3%	-	1%	0%	0%	1%
NONE OF THESE	12%	12%	17%	14%	4%	8%	14%	18%

Among consumers who engage with brands on social media: Which of the following - if any - are the top reasons why you engage with brands on social media? ^Small base size, findings are directional.

RETAIL THINKING BEHIND WHY CONSUMERS INTERACT WITH BRANDS ON SOCIAL MEDIA

WHY CUSTOMERS ENGAGE WITH BRANDS ON SOCIAL MEDIA ACCORDING TO RETAIL EXECUTIVES	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
CONVENIENCE OF LOOKING UP PRODUCT INFORMATION ON MY PHONE OR TABLET	44%	40%	52%	46%
GET TO KNOW THE BRAND MORE THROUGH POSTED CONTENT	44%	43%	41%	47%
LEARN ABOUT SALES AND PROMOTIONS	44%	45%	45%	40%
STAY UP TO DATE ON THE LATEST PRODUCTS	42%	46%	36%	38%
INTERACT WITH ONLINE CUSTOMER SERVICE IF THEY HAVE A QUICK QUESTION	38%	34%	38%	44%
SEE THE PRODUCTS IN THEIR INTENDED ENVIRONMENT	38%	36%	43%	36%
COMMUNICATE WITH OTHER CONSUMERS OF THE BRAND	34%	36%	32%	30%
OTHER	-	-	-	-
NONE OF THESE	-	-	-	-

Among retail executives: In your opinion, which of the following - if any - are the top reasons why consumers engage with brands on social media?.

SUB-AUDIENCE BREAKOUTS (CONT.)

CONSUMERS' BIGGEST IN-STORE PAIN POINTS

CONSUMERS' BIGGEST PAIN POINTS WITH IN-STORE SHOPPING	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
WAITING IN LINES TO PAY	33%	34%	28%	21%	24%	26%	36%	39%
SURROUNDED BY PEOPLE	15%	15%	22%	11%	19%	23%	16%	8%
GETTING TO THE STORE	13%	13%	15%	20%	20%	14%	12%	12%
FINDING PARKING	11%	11%	6%	17%	8%	12%	10%	11%
MAKING RETURNS	8%	8%	8%	8%	8%	10%	8%	7%
NAVIGATING THE STORE	6%	6%	6%	4%	6%	6%	4%	7%
OTHER	2%	2%	-	2%	2%	-	1%	3%
NO PAIN POINTS	13%	12%	15%	17%	13%	10%	13%	13%

Among consumers: What is the biggest pain point that you associate with going to a physical store to shop?

CONSUMERS’ BIGGEST IN-STORE PAIN POINTS ACCORDING TO RETAIL EXECUTIVES

Sub-Audience Breakouts (Cont.)

RETAIL EXECUTIVES’ THOUGHTS ON CONSUMERS’ BIGGEST PAIN POINTS WITH IN-STORE SHOPPING	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
GETTING TO THE STORE	24%	24%	24%	23%
WAITING IN LINES TO PAY	20%	21%	21%	16%
FINDING PARKING	15%	12%	21%	15%
SURROUNDED BY PEOPLE	15%	15%	13%	16%
NAVIGATING THE STORE	14%	14%	15%	13%
MAKING RETURNS	13%	15%	6%	17%
OTHER	-	-	-	-
NO PAIN POINTS	0%	1%	-	-

Among retail executives: In your opinion, what is the biggest pain point for consumers when they visit a physical store to shop?

MOST ATTRACTIVE RETAIL LAYOUT TO CONSUMERS

CONSUMER PREFERENCE ON RETAIL LAYOUT	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
A LARGE VOLUME OF DIFFERENT PRODUCTS	58%	59%	50%	64%	63%	55%	54%	62%
A CERTAIN CATEGORY OF PRODUCTS	30%	31%	30%	22%	31%	34%	34%	23%
DON'T KNOW	12%	11%	20%	14%	6%	10%	12%	15%

Among consumers: Which of the following is the most attractive layout of a physical retail store?

RETAIL EXECUTIVES' OPINION ON MOST ATTRACTIVE RETAIL LAYOUT TO CONSUMERS

RETAIL EXECUTIVES' THOUGHTS ON CONSUMERS' PREFERRED RETAIL LAYOUT	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
A LARGE VOLUME OF DIFFERENT PRODUCTS	60%	61%	60%	59%
A CERTAIN CATEGORY OF PRODUCTS	40%	40%	40%	41%

Among retail executives: Which of the following is the most attractive physical layout to consumers in a retail store?

MOTIVATIONAL IMPACT OF VR TECH ON CONSUMERS

MOTIVATIONAL IMPACT OF VR TECH ON CONSUMERS	TOTAL N=1,200	U.S. n=1,000	U.K. n=100	AUS n=100	GEN Z n=115	MILLENNIAL n=345	GEN X n=289	BOOMER n=376
MOTIVATE ME TO TEST AND PURCHASE PRODUCT IN-STORE	47%	49%	35%	49%	50%	50%	45%	47%
MOTIVATE ME TO TEST THE PRODUCT IN-STORE, BUT BUY ONLINE	22%	21%	24%	28%	33%	32%	19%	13%
I WOULD BUY THE PRODUCT ONLINE WITHOUT TESTING	31%	31%	41%	23%	17%	18%	36%	40%

Among consumers: If a store was equipped with VR technology, such as a headset to experience a product you were interested in purchasing, would this type of technology…

RETAIL EXECUTIVES' OPINION ON THE IMPACT OF VR TECH ON THE CONSUMERS' DECISION TO PURCHASE

RETAIL EXECUTIVES' OPINION ON THE INFLUENCE OF VR TECH ON CONSUMERS' PURCHASING DECISIONS	TOTAL N=400	U.S. n=200	U.K. n=100	AUS n=100
MUCH MORE LIKELY TO PURCHASE IN-STORE	27%	32%	20%	24%
SOMEWHAT MORE LIKELY TO PURCHASE IN-STORE	68%	64%	77%	69%
THERE WOULD BE NO EFFECT ON HOW THEY PURCHASE	5%	5%	3%	7%

Among retail executives: Now, if a consumer was interested in purchasing a product, how much – if at all – would VR technology (such as a headset to experience a product) influence a consumer's decision to purchase the product in-store, rather than online?

WAKEFIELDRESEARCH.COM