



The future of retail 2019

The paradox between convenience
and connection

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The paradox between convenience and connection

For the first time, millennials are projected to surpass the boomer generation in population size,¹ which will be one of the most impactful events that the complex world of retail has seen. Younger consumers are buying less, and they are interested in brands that provide them with sustainable options and share their viewpoints. At the same time, the rapid influx of technology in the retail experience has driven consumers of all ages to expect a connected, convenient experience that seamlessly aligns with their everyday lives.

Since 2013, Walker Sands' annual Future of Retail report has given retailers and commerce leaders a lens to better understand the impact of technology on shifting consumer preferences. This year's report takes a deeper dive into the collision of consumer lifestyle preferences and shopping habits, especially among younger generations.

The 2019 Future of Retail report reveals that all purchase decisions come down to two factors: convenience and connection. Consumers shopping online expect a convenience that goes beyond the in-store experience, and one of the few drivers of loyalty in a purchase decision is a connection with the brand. It's no longer about just creating a seamless online-to-in-store experience. Instead, it's using online and in-store platforms to facilitate a deeper connection that feels worth having.

The youngest consumers are not only most likely to say they are buying less, they're also most likely to want brands to offer sustainable options and pay attention to their viewpoints. Millennials are driving the evolution of the complex world of commerce. And as this generation becomes the largest group with purchasing power, it's important to explore the parallel between the call for convenience and the opportunities for deeper connection to be successful in the years to come.



¹ <https://www.pewresearch.org/fact-tank/2018/03/01/millennials-overtake-baby-boomers/>

Key findings

Consumers have grown comfortable shopping online and are placing bigger bets on the convenience it provides.

Consumers are more comfortable spending big online. Forty-six percent of consumers say they are more open to purchasing a big-ticket item like a car or a grill online than they were a year ago.

Amazon is delivering on the convenience consumers crave — and younger consumers are taking advantage. A third of consumers (32%) now receive one or more Amazon packages per week, and one in 10 (10%) consumers receive three or more Amazon packages per week. Forty-three percent of millennials ages 18-35 report receiving one or more packages per week.

01

Consumers want to feel more connection with items they purchase and the brands they purchase from.

Consumers are buying less. Sixty-six percent of consumers say they are buying less than they used to because they are more conscious of keeping a clean, organized lifestyle. Consumers ages 18-35 are even more likely to say they are buying less (72%).

Sustainability is increasingly important, especially to younger consumers. Fifty-five percent of consumers are at least somewhat more likely to make a purchase from a brand or retailer committed to sustainability — when looking at younger consumers (ages 18-35) that number jumps to 65%.

02

There are opportunities to leverage the combination of convenience and connection to drive commerce forward.

In-store is still in demand. Free and fast shipping continue to be the number one drivers of more online purchases for the sixth year in a row, but a fourth of consumers (25%) feel more connected with brands when they go in-store.

Consumer preferences slow to shift in grocery. A third of all consumers say they choose grocery products based on sustainability (31%) or brand reputation (35%), while just 15% say they are excited about more tech in grocery.

03



01

Shopping decisions driven by tech-infused lifestyle

As technology continues to shape connected consumer lifestyles, it has driven a shift in buying behavior. Everything from an increased usage of smart devices to the political landscape is impacting how consumers buy. As a result, consumers are driven by new levels of convenience and are craving connection with brands who share their viewpoints.



Device ownership increases among younger consumers

Smart devices have now become the norm, with less than 5% of consumers reporting they don't currently own a smart device.

Millennials ages 26-35 are most likely to own a connected home device. Three out of 10 consumers ages 26-35 (30%) and 25% of consumers ages 18-25 report owning a smart home appliance. This indicates a shift toward a reliance on the convenience offered by technology-driven experiences. The shift toward a more connected lifestyle shows up even in consumer preferences for television watching — 79% of consumers ages 18-25 have a Netflix subscription, compared to just 43% who have a traditional cable subscription.

Overall, consumers of all generations have begun to adopt more technology in their daily lives, and trends among younger generations are becoming more commonplace.

Today's connected consumer is more comfortable than ever with making online purchases, and they enjoy the convenience

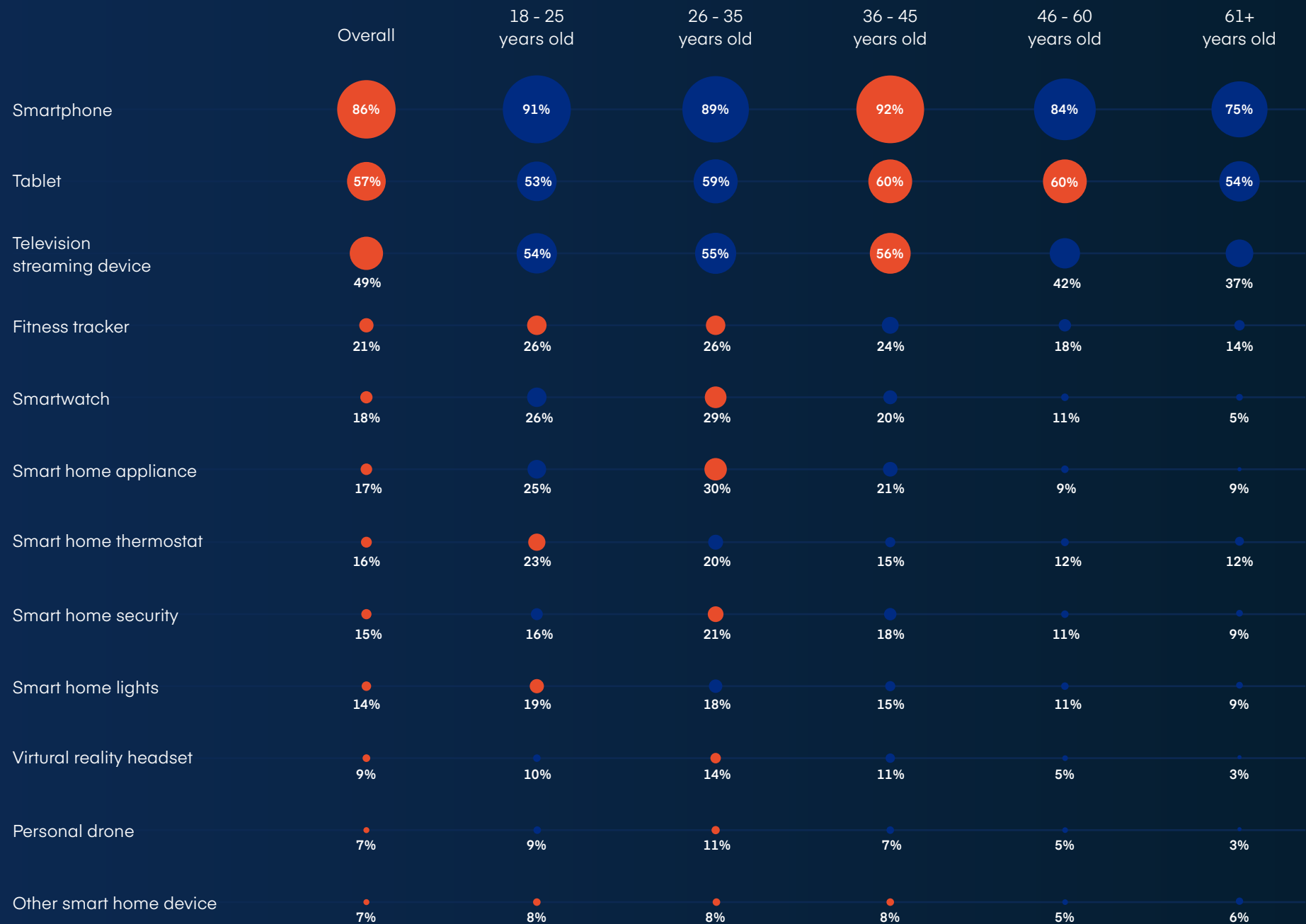
that Amazon provides. A third of consumers (32%) now receive one or more Amazon packages per week, and one in ten (10%) consumers receive three or more Amazon packages per week. Millennial consumers ages 18-35 are even more likely to receive multiple Amazon packages regularly — in fact, nearly half (43%) report they receive at least one Amazon package per week. And with Amazon now offering more than 10 million items available for one-day shipping, it's likely there will continue to be an uptick in the regularity.²

And it's not just that Amazon ships quickly — more than a third (35%) of that same millennial age group say they are willing to wait longer for a product from Amazon if it's easier than other options. Amazon has been able to drive consistent value through convenience, which is one of the most important factors for today's consumer. One in five (21%) don't care who they're buying from — they just care about price and convenience.

² https://techcrunch.com/2019/06/03/amazon-says-over-10-million-items-are-now-available-for-one-day-shipping/?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3ATechcrunch+%28TechCrunch%29



Device ownership by age



A battle cry for brands to align with consumer viewpoints

Today's consumers want to purchase from brands that offer alignment with their views. A recent study from Sprout Social³ reveals consumers expect brands to take a stand on political and social issues — two-thirds of consumers believe it is "important" or "very important."

And political and economic factors are playing a larger role in consumer purchasing decisions. In fact, more than two-thirds of consumers ages 18-35 (68%) said that the current political climate has impacted their shopping experiences in some way.

Similarly, our data reveals that consumers are paying more attention to how brands and retailers react to timely topics. Over 40% of consumers say their awareness and concern of the social policies of brands has increased since the election of President Trump (46%). For consumers ages 35 and under that number rises to more than half (53%).

Youngest consumers (18-25) are also placing more of an emphasis on supporting women-owned retailers (16%) and immigrant-owned retailers (12%), an indication that diversity and equality are becoming a bigger purchase driver for Americans today.

³ <https://sproutsocial.com/insights/data/championing-change-in-the-age-of-social-media/>



02

The increasing role of sustainability in retail

Sustainability continues to make a bigger impact on consumer buying habits. Consumers are buying less, renting more and are overall more conscientious of brand sustainability practices.



The “Marie Kondo Effect” drives the experience generation to adopt a “less-is-more” mentality

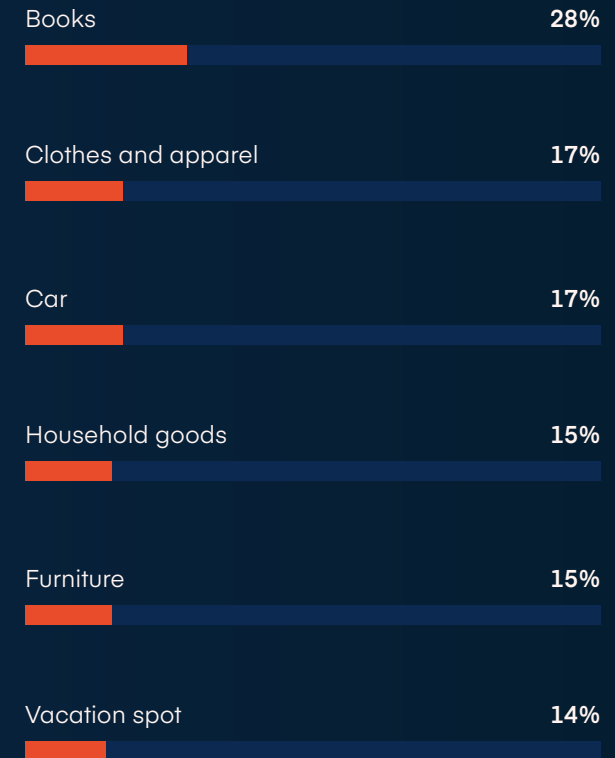
A recent report by Expedia⁴ revealed that three out of four U.S. consumers are more interested in investing in experiences than purchasing products. And as younger consumers increase buying power, they’re even less interested in material possessions than their parents.⁵

The timely call to consumers to “tidy up” from book and Netflix star Marie Kondo seems to have added fuel to the fire. In fact, two out of three consumers (66%) say they are buying less than they used to because they are more conscious of keeping a clean, organized lifestyle. That number jumps to 72% for those ages 18-35.

As a result, consumers, especially younger ones, are taking to rentals for everything from formal wear to furniture. Nearly half (49%) of consumers of all ages have rented at least one type of product in the past year. For consumers ages 18-35 that number jumps to 65%.

⁴ <https://www.luxurytraveladvisor.com/running-your-business/stats-74-percent-americans-prioritize-experiences-over-products>
⁵ <https://www.forbes.com/sites/blakemorgan/2019/01/02/ownership-no-problem-an-updated-look-at-why-millennials-value-experiences-over-owning-things/#3a4a84ef522f>

Top rental categories for consumers ages 26-35 in the past year



Source: Walker Sands The Future of Retail 2019

And when younger consumers do want to buy something, they're more likely to try it first. "Try-and-buy" clothing services, such as Stitch Fix and Trunk Club, continue to be on the rise and will likely see increased growth in the next year. Just 8% of consumers report currently using a service, but 31% report they are at least somewhat likely to try one in the next year — a more-than three-fold increase. More than half of consumers ages 18-35 (51%) are at least somewhat likely to use a "try-and-buy" clothing service over the next year.

As consumers pay closer attention to the quantity of the products they buy, they're also putting sourcing and manufacturing practices under scrutiny. Two-thirds of consumers under the age of 35 say they are at least somewhat more likely to purchase from a brand or retailer committed to sustainability (66% of those 18-25 and 64% of those 26-35). Eight out of 10 consumers ages 18-35 (79%) say it's at least a consideration when making a purchase.

The combination of these factors has led to a question of what the future holds for fast fashion, suggesting that retailers able to provide more sustainable products and practices will have a unique opportunity in the future.

Retailers able to provide more sustainable products and practices will have a unique opportunity in the future.

6 <http://fortune.com/2019/01/18/marie-kondo-konmari-retail/>



03

Big-ticket e-commerce on the rise

As the comfort level surrounding online shopping has increased, so has the amount consumers are willing to spend for a new product online. Customized offers, saved preferences and right-to-your-door delivery have made it easier than ever to make a quick and easy online purchase.



The rise of not just online shopping — but customized, easy-to-purchase interactions on mobile, and even voice, have made consumers accustomed to making larger purchases online. And with the pairing of online reviews, customers have come to trust specific online sources, including everything from peer reviews to specific sites dedicated to individual product categories (example: America's Test Kitchen).

The Instagram impact

The rise of “Instagrammable moments” has also impacted the branded connection experience — not only in the moment, but in how consumers are interacting with, perceiving and purchasing from brands on a daily basis.

The increase of online shopping and ads on social platforms has also led to an influx of Instagram and blogging celebrities driving real revenue for brands. In fact, 13% of consumers say they are willing to spend more with a new brand or retailer if it has been promoted by a celebrity or social media influencer they follow. Nearly a fourth (22%) of those ages 26-35 said the same.

The ‘grammable influence has even extended to packaging and groceries. When asked how they purchase groceries, 31% of those 18-25 say they pick based on packaging appeal. More than a fourth (26%) of those 26-35 say the same.

Online recommendations have been a large part of consumer willingness to purchase more frequently and make larger investments online. And consumers have increasingly looked to Amazon to provide those recommendations — nearly a fourth of consumers (24%) say they are more willing to try new products recommended by Amazon than a brand or retailer. This indicates looking toward Amazon's non-bias as a third-party algorithm to make the right recommendations.

Nearly a fourth of consumers ages 25-36 say they are willing to spend more with a new brand or retailer if it has been promoted by a celebrity or social media influencer.



The call for convenience when making big-ticket purchases

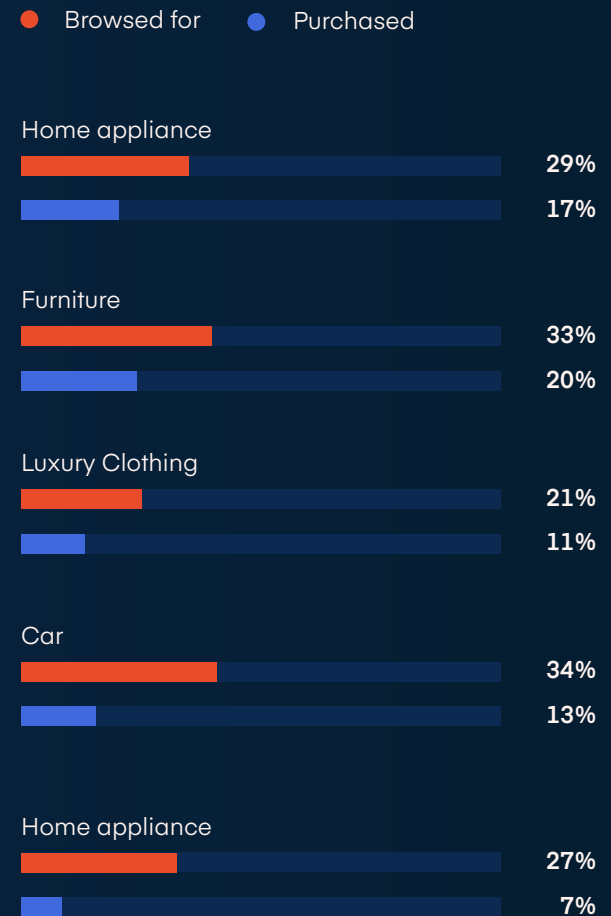
With more available resources online, consumers have increased focus on research ahead of major purchases. If a consumer is entering the store, especially to make a larger purchase, it's very likely they have done research ahead of time. Retail Dive reveals that nearly nine out of 10 consumers (87%) now begin product searches online.⁷

And this aligns with an increased comfort in online purchasing of big-ticket items where research is easier and purchases often arise from the recommendation of others. This year's report reveals that nearly half of consumers (46%) say they are more open to purchasing a big-ticket item online than they were a year ago. That number is even higher for those 18-25 (51%) and 26-35 (56%).

Categories seeing the most growth in online browsing and purchase include larger, more expensive items that have strong reviews and a typically low reputation for in-store experience. For example, a third of consumers report having browsed for furniture (33%) and cars (34%) online in the past year, and three in 10 have browsed for appliances online in the past year.

⁷ <https://www.retaildive.com/news/87-of-shoppers-now-begin-product-searches-online/530139/>

Big-ticket items consumers have browsed or purchased online in the past year



Source: Walker Sands The Future of Retail 2019

But consumers aren't just browsing — they're also buying big-ticket items online. Consumers are following through on their research and making bigger online purchases. One in five consumers (20%) bought furniture online in the past year.

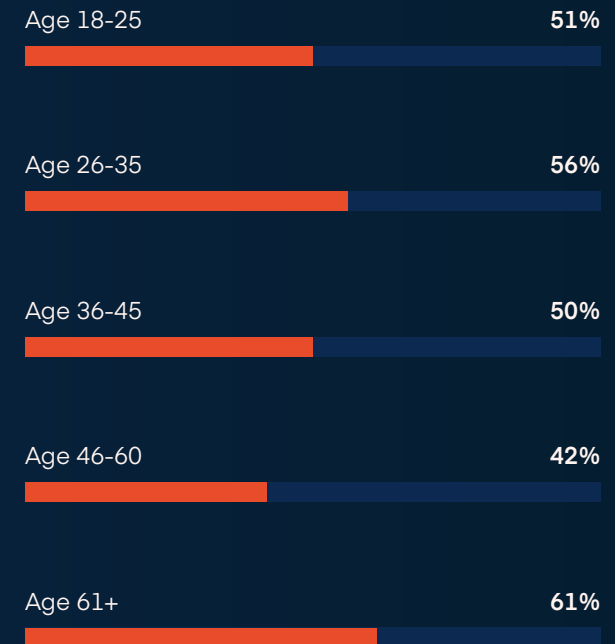
Consumers ages 26-35 are most likely to have browsed for or made purchases for big-ticket items (37%, compared to 24% of those over the age of 45), again indicating the combination of comfort with shopping online and funds for purchase. As technology allows for better and more convenient online experiences, the number of consumers willing to spend more online will also continue to increase.

In recent years, online-based furniture companies like Wayfair, Overstock.com and Interior Define have seen massive growth,⁸ and the rise of more big-ticket online purchases has also been fueled by a focus on using technology to provide 3D imagery and spatial planning tools for consumers.

One in five consumers bought furniture online in the past year.

⁸ <https://www.statista.com/chart/14771/e-commerce-sales-of-furniture/>

Top rental categories for consumers ages 26-35 in the past year



Source: Walker Sands The Future of Retail 2019

Improved supply chain transparency fuels big-ticket growth

While consumers say faster shipping will make them more likely to shop online, they seem to be driven by the overall convenience of door-to-door delivery. Three out of five consumers (61%) have purchased a product online in the past year to be delivered with regular shipping, and 42% have purchased a product in the past year to be delivered with two-day shipping.

Picking up in store has also gained steam, with 38% of consumers reporting they have ordered online to pick up at the store.

Still, the majority of consumers are looking for improvement on today's delivery options — just 17% of consumers say they are always satisfied with online retailer's shipping options for speed of delivery, compared to nearly double who are satisfied with Amazon's delivery speed (30%).

Retailers are doing a better job of providing transparency in the delivery process, with 81% of consumers rating retailers' communication as "excellent" or "good," compared to 83% who feel the same about Amazon's communication during the delivery process.

Consumer Insights

Have purchased a product online **61%**



Have opted for two-day shipping **42%**



Have ordered online to pick up in store **38%**



Are satisfied with Amazon's delivery speed **30%**



Source: Walker Sands The Future of Retail 2019

04

Free and fast shipping still fuels online purchase decisions

While so much has changed in retail over the past several years, the convenience of free and fast shipping remains the key to increased online purchases. And while consumers are optimistic about the future of online shopping, better in-store experiences continue to become more prominent across various product categories.



Online channels are offering a more convenient one-stop shop experience than ever before. In fact, just 19% of consumers believe that the online experience will never surpass the in-store customer experience — 27% believe it already has and another 15% believe this is the year.

So what are consumers still looking for when it comes to the online shopping experience? Free shipping reigns as the most important option for the sixth year in a row (77%), followed by fast shipping. Amazon's one-day shipping and FedEx's seven-days-per-week shipping comes right in time, since 35% of consumers say next-day shipping is a key in getting them to purchase more online. But fast shipping preferences

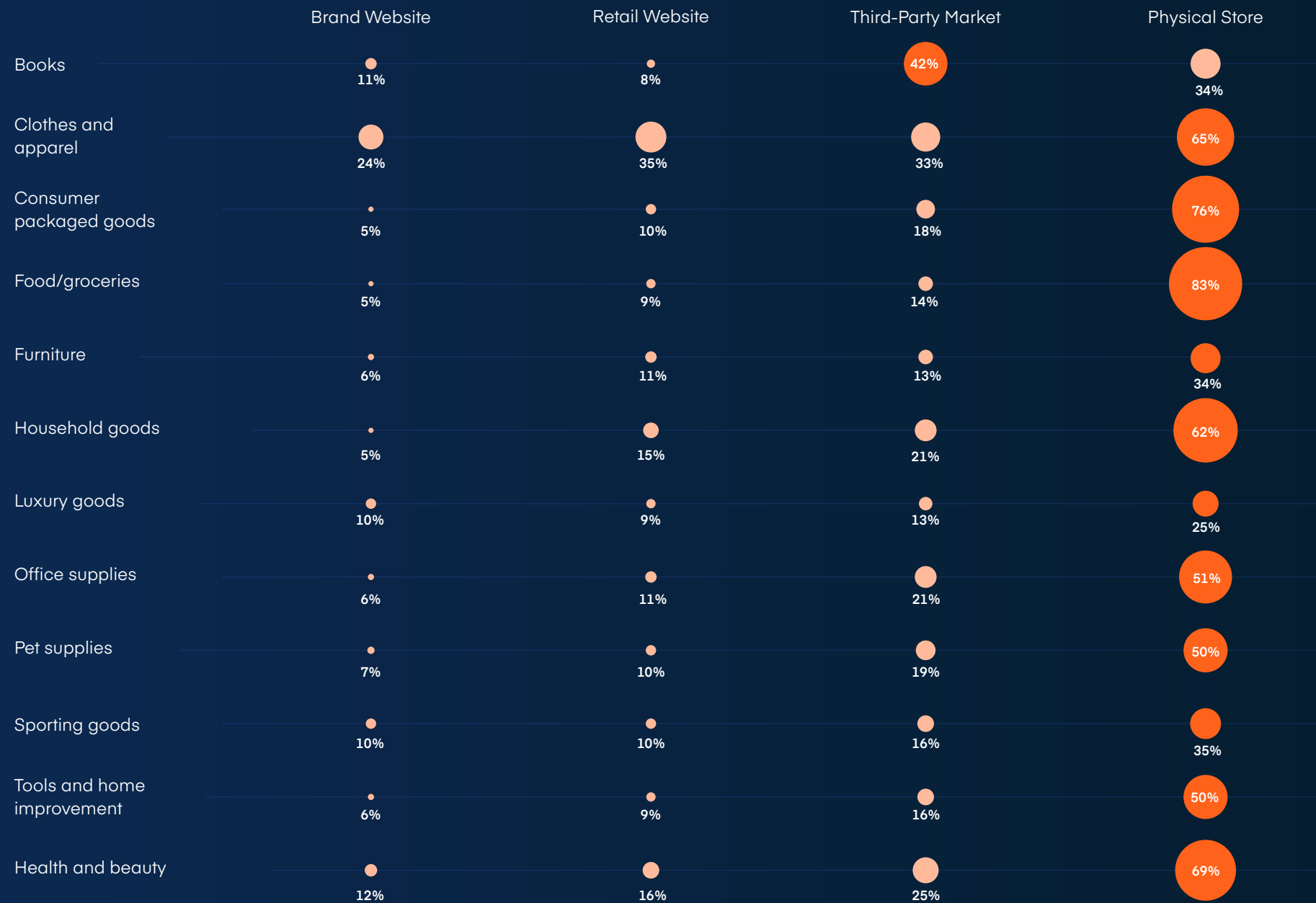
don't stop there — 39% of consumers say same-day shipping would make them more likely to shop online, and 20% are looking for two-hour (or less) shipping. Which product categories have the most opportunity for online growth, and which are seeing the most third-party or in-store purchases? When asked where they have purchased products in the past year, consumers again varied across brand and retailer websites, third-party marketplaces and physical stores.

Clothing (65%) and groceries (83%) were the two categories where consumers have purchased the most in store in the past year. Books (42%) and health and beauty products (25%) were the most purchased on a third-party marketplace in the past year.

Online purchase drivers



Purchasing channels by product



05

Online convenience meets in-store opportunity

While so much of the online experience has been personalized, the data reveals that feeling connected to a brand involves more than just advertising relevant products — and in-store experiences play a large part. In fact, one in four consumers (25%) say they feel more connected with brands when they go in store.



Convenience meets connection in store: preferences for one-stop shop versus a branded shopping experience

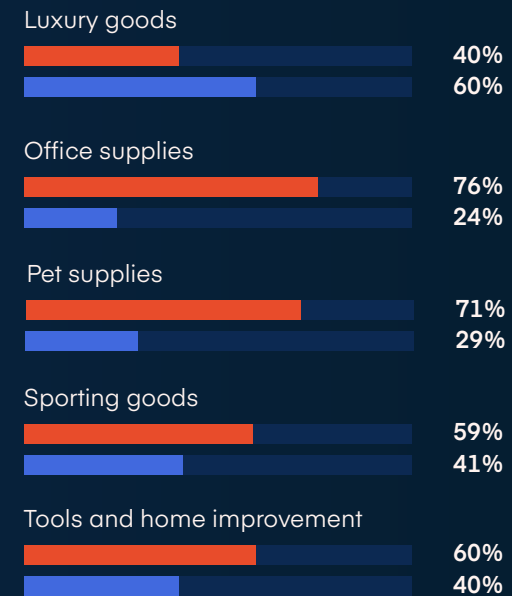
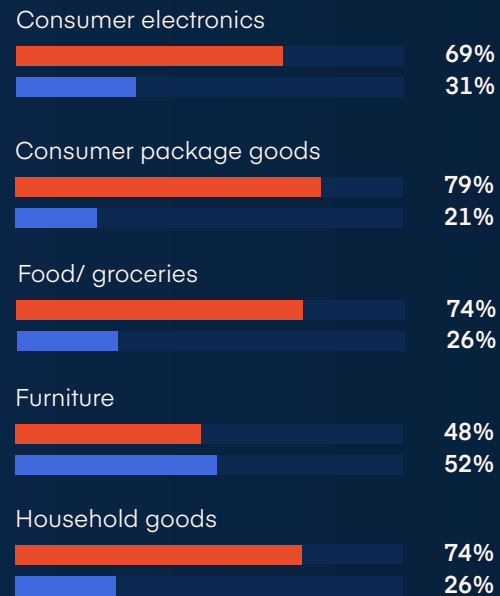
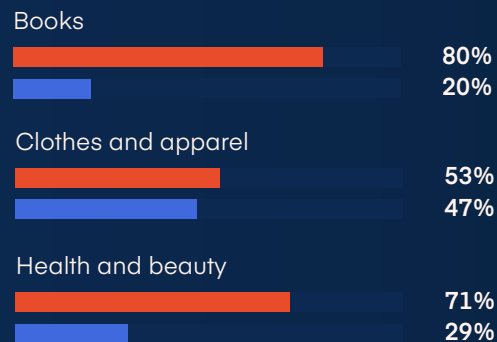
When asked if they prefer the convenience of a one-stop shop or the experience of a branded store, there is no one category where consumers are completely aligned on preference. This demonstrates the need for brands across all product categories to balance convenience and connection in their experiences.

The number one place consumers prefer the convenience of a one-stop shop is for books (80%), followed by CPG products (79%), office supplies (76%), food or groceries (including fresh food) (74%), health and beauty (71%) and pet supplies (71%).

Clothing and furniture were the two categories where consumers were most split between the convenience of a one-stop shop and the experience of a branded store. This indicates a rise in consumer comfort purchasing items online alongside the growth of technology fueling these categories. It also hones in on the rising consumer preference for experience-driven commerce in store. Luxury goods also had a stronger preference for a branded experience (60%). While consumers are focused on convenience in categories such as luxury, they still want the white glove treatment.

Shopping preference by product

● One-stop shop ● Branded store



The resurgence of the in-store experience for younger consumers

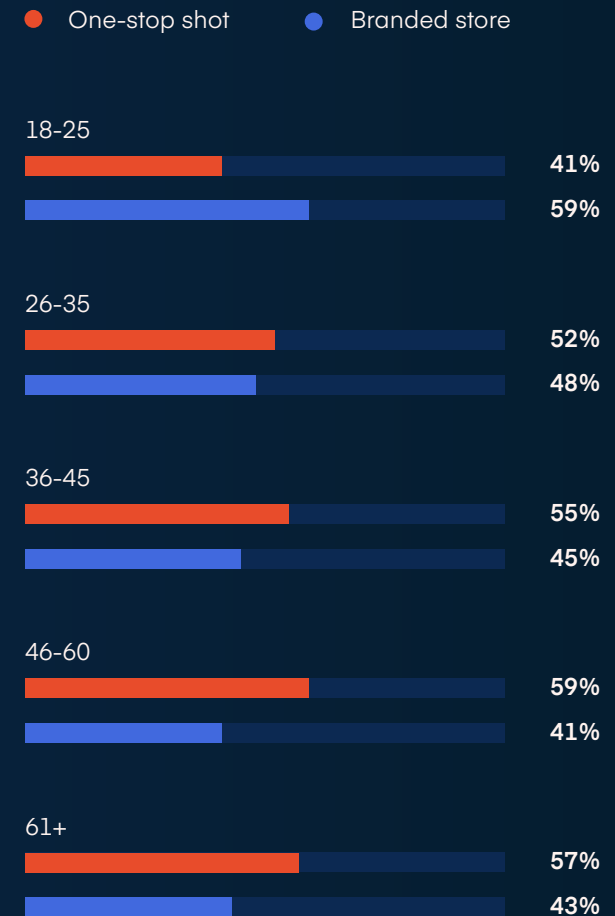
This year's research reveals that while consumers continue to grow in comfort shopping online, the youngest consumers are also focused on more in-store, particularly on more niche and branded experiences.

Those under the age of 35 are overall less likely to want a one-stop shop experience. And the youngest consumers are the most likely to want a branded retailer experience, especially when it comes to clothing. In fact, 59% of those 18-25 say they prefer a branded experience.

Youngest consumers (ages 18-25) are also the most likely to say they've shopped at a mall in the past year to buy clothing (69%), indicating a shift toward more niche shopping experiences. In fact, one out of five (21%) consumers ages 18-35 have been to a mall in the past year to visit an experience store.

As today's younger consumers continue to play a larger role in today's shopping economy, their preferences for more specific in-store branded experiences are likely to completely evolve today's brick-and-mortar stores.

Big-ticket items consumers have browsed or purchased online in the past year



Source: Walker Sands The Future of Retail 2019

06

An eye on the future with a mind in the past

While the competitive landscape in online grocery has continued to gain steam, consumer preferences remain focused on the in-store grocery experience. The grocery landscape of the future will continue to focus on more sustainable options, fueled by technology-enabled experiences that offer more convenience in store and leverage third-party options for delivery.



Today's grocery preferences

As retail has changed, grocery retail has largely remained an anomaly in meeting consumer preferences. Amazon's 2017 acquisition of Whole Foods introduced a move toward driving a more technology-driven grocery experience, but the move online has been slow — just one in 10 consumers (11%) report

purchasing fresh foods from Amazon in the past year. Comparably, 82% of consumers report having made a purchase in a physical grocery store in the past year, and 55% have purchased food from a big-box retailer, such as Target or Walmart.

Shopping preference by product



The 2019 study reveals that just 15% of consumers are excited about the technology revolution in grocery. Sixty-four percent of consumers say they still like to touch and feel fresh produce, and half of consumers (50%) just outright like shopping for groceries. More than a third (36%) admit they just use it as a reason to get out of the house.

So if technology is not going to replace grocery shopping in store, why is everyone so worried about Amazon, and why are major grocery players making so many investments? Because it's still enabling a more interactive and convenient grocery experience.

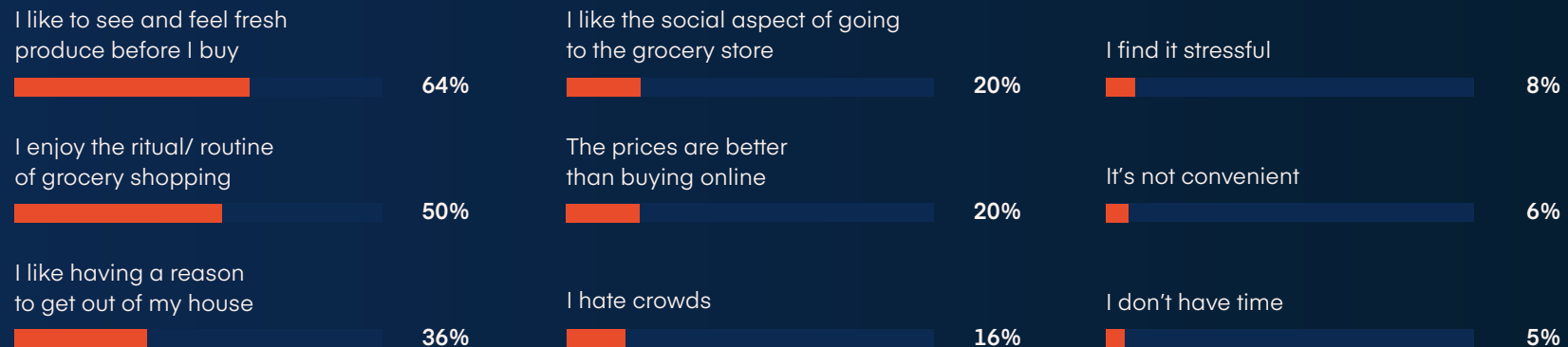
Consumers are more comfortable buying online from grocers than third-party marketplaces. While consumers aren't keen on tech-driven experiences in grocery, just a fourth of consumers

report they would never buy groceries from an online retailer (26%), and 38% say they would not purchase from a third-party marketplace such as Amazon.

Consumer preferences for sustainability also extend into grocery, especially among younger consumers. Nearly four out of 10 consumers under the age of 35 say they choose grocery products based on sustainability (39%, compared to 31% of consumers overall). More than a third of consumers (35%) choose grocery products based on their brand reputation, indicating a connection to a grocery brand or retailer is just as important.

Other important factors include locality (23%) and the ability to minimize packaging waste (18%).

Consumer sentiment toward in-store grocery shopping



07

Using convenience and connection to drive commerce forward

While consumers have increased their online shopping habits, they've also become more intentional about how and what they purchase. An increasing focus on sustainability, coupled with the influx of technology in the buying experience, has enabled a new wave of consumers who are more connected to technology and want a clear differentiation from a brand in order to purchase when it's not the most convenient experience. True success for retailers in the future will be in the ability to bridge this gap.



The importance of reviews for gaining trust and building brand reputation

Consumers will continue to browse less and rely more on peer and trusted source reviews for products. The rise of online shopping has allowed for more information to be shared not only from brand to consumer, but also consumer to consumer. Younger consumers will continue to take advantage of new offerings for convenience surrounding products, especially when they already know what they want to buy. However, driving connection with brands is still possible. The Drum reports that peer reviews impact up to 93% of purchase decisions.⁹ This, coupled with our data, reveals that consumers may be willing to prioritize products recommended by a trusted source.

⁹ <https://www.thedrum.com/news/2017/03/27/online-reviews-impact-purchasing-decisions-over-93-consumers-report-suggests>

Driving convenience through faster delivery to keep the connection

Third-party delivery capabilities and partnerships will reign supreme — for the past few years, this report has discussed the importance of third-party delivery capabilities for larger purchases. Consumers trust third-party delivery services to bring the experience together.

Consumers ages 35 and under are most open to third-party delivery for products across categories. Just 17% say they would not trust a third-party to deliver products in any category, compared to 39% of those over the age of 45.

As consumers continue to focus their purchases on organizations they feel connected with, brands and retailers have more options than ever to build in the convenience of faster delivery.

Shopping preference by product



Technology as a way to bridge the gap between convenience and connection

More than a third of consumers (35%) now own a voice-controlled digital home assistant, such as Amazon Alexa or Google Home, and another 12% plan to purchase one in the coming year. The rise of those who own devices has also coupled with an increased focus on using devices frequently in daily life — 29% of those who own a device report they use it three or more times per day.

Even with increased sensitivity surrounding data collection and IoT applications, consumers are willing to bring devices into their home. Just 19% report they are not planning to buy a device due to privacy concerns.

But that doesn't mean that those who own the devices don't have hesitations—nearly one in five Alexa owners (18%) say they believe Alexa is listening, but that the convenience of having the device outweighs the risk. Another 20% say it "creeps them out," but that they want to keep their device. Just 3% of current voice-controlled device owners say the creepiness factor is enough to make them get rid of their device. In fact, 45% of consumers are excited about Amazon's growth because of the more convenient and less expensive experiences it provides.

Purchases made through voice-controlled devices are still low, with just 15% of consumers reporting having made one in the past year. However, of those with a device, two out of five (42%) report having made a purchase with it, indicating an increasing comfort among those with devices. For consumers ages 26-35 that number is as high as 53%.



Food and grocery ranks highest on the list of what consumers have purchased via a voice-controlled device at 21%, followed by CPG goods (16%).

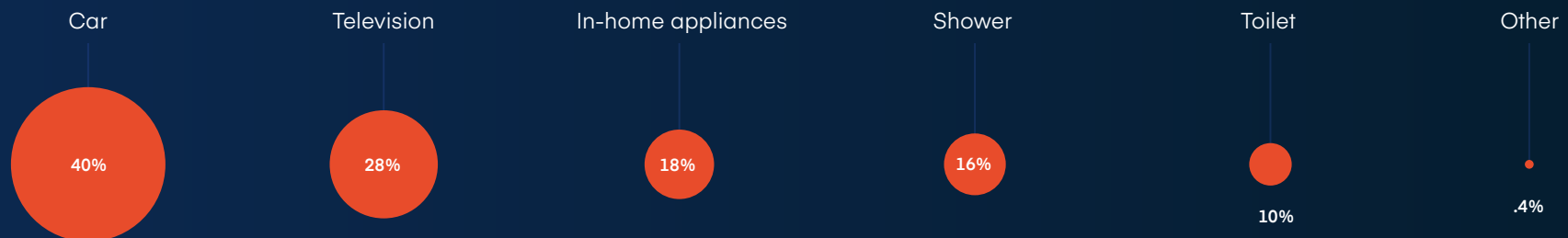
However, the future is bright for voice-enabled commerce. Fifty percent of consumers would spend more than \$10 on a voice-controlled device purchase without seeing the product first. Nearly a third (31%) would spend \$20 or more.

Consumers are also optimistic about opportunities to bring voice experiences into their lives in other ways. As many

as two out of five consumers would like to have hands-free commands in their cars, and a total of 26% are looking for voice-control devices in the bathroom.

Younger consumers are most likely to want voice-controlled experiences, with 77% responding that they believe they would be of value in at least one aspect of their lifestyle, compared to just 39% of those over the age of 60.

Places consumers think voice-controlled capabilities would add value



Amazon's move to couple convenience with trust

When it comes to Amazon's recent acquisitions, consumers are even more optimistic about convenience in the future. When asked about their perception of Amazon's growth in the retail industry, 45% say they are excited about it because it will provide either more convenient or less expensive buying experiences. Just 14% are concerned about Amazon gaining a monopoly.

As the retail world pushes on and becomes a larger part of consumers' everyday lives, they will continue to become more empowered by convenience. They will also continue to shift preferences based on brands willing and able to build a deeper connection.

When asked about their perception of Amazon's growth in the retail industry, 45% say they are excited about it because it will provide either more convenient or less expensive buying experiences.

Consumer perceptions of Amazon's growth

I'm excited about it because Amazon provides me more convenient buying experiences **29%**

I'm excited about it because Amazon provides me less expensive buying experiences **16%**

I am concerned about Amazon gaining a monopoly **14%**

I am concerned about Amazon putting other stores out of business **11%**

I am neutral—I don't care who I'm buying from, I care about price and convenience **21%**

Source: Walker Sands The Future of Retail 2019

08

Key predictions for the future of retail

The future of retail continues to drive purchase decisions beyond the point of sale interaction. As technology gives rise to new ways to make the shopping experience more convenient, it is increasingly important for brands and retailers to pay attention to the impact on consumer lifestyles and find new ways to connect, further bridging the gap between convenience and connection.



All experiences will come down to convenience and connection.

Certain goods will become more synonymous with a convenient connection, but truly differentiated brands will drive connection that surpasses convenience for today's consumers. Brands able to differentiate themselves by demonstrating their value to consumers as a part of their lifestyle will be able to build both convenience and connection to compete and succeed in today's retail landscape.

01

There will be a shift toward online one-stop shops and in-store experiences.

Younger consumers are excited about the opportunities that Amazon brings, but they are much less likely to be interested in a one-stop shop experience. The combination of convenience online paired with better in-store experiences will drive online and offline experiences apart in the future.

02

Sustainability and brand reputation, not technology, likely to shift grocery landscape.

While there has been much talk of technology in grocery, consumers are more focused on aligning with brands that share their views and provide pretty packages than a tech-driven grocery experience.

03

Methodology

The Walker Sands Future of Retail 2019 study surveyed 1,600 consumers across the United States on their shopping habits, preferences and views on emerging retail technology. The survey was conducted online in March 2019 and has a 2% margin of error at a 95% confidence level.

Commerce technology is evolving at an incredibly fast pace. Read our case studies and view our client list to see how we use an integrated approach to B2B marketing to help retail technology companies accelerate growth:

walkersands.com/clients/retail-technology



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