People love their smartphones. But they adore the experience of strolling the aisles of a boutique or big-box store even more.

Question after question in DMI’s survey reinforces the value of in-store retailing. But what about Amazon? Aren’t they supposed to be taking over the planet? Isn’t the “retail apocalypse” playing right into Amazon’s hands?

Not yet. But there’s no denying the clouds on the horizon for retailers who ignore the lessons Amazon teaches millions of consumers every day.

DMI’s annual survey of consumer behavior extols the virtues of in-store shopping while acknowledging the colossal impact of Amazon. This exclusive in-depth report summarizes consumer practices and preferences under three main headings:

**The State of Connected Commerce:**
Why people prefer in-store experiences, how Amazon educates the retail sector and how AI reshapes customer service

**Enhancing the Consumer Experience:** Why consumers prize convenience, how shipping deals and loyalty programs have merged, and why social commerce is on the rise.

**Optimizing the Path to Purchase:**
How to make life better for consumers when they’re browsing, buying, seeking support and communicating with your brand.

Read on to discover the survey’s key findings plus actionable guidance from DMI experts on e-commerce, digital strategy, customer experience, artificial intelligence and technology implementation.
Buyers Still Believe in Brick-and-Mortar
88% of survey responses cited in-store purchases in the past month, vs. 59% for online and 38% for retailers’ mobile apps. Our data underscores the reality that retailers must build holistic experiences that meld mobile, desktop and in-store shopping.

Amazon is a Rival, But it’s Not the Enemy
49% of responses call Amazon the top place to learn about new products, topping social media (45%) and search engines (38%). Amazon’s edge in product awareness reveals a formidable competitor whose mastery of the customer experience provides vital insight.

AI is at an Inflection Point
34% of survey respondents have encountered AI in customer service. Of those, 54% were either satisfied or very satisfied with the experience. While people still prize human customer service, they’re acclimating to AI and automation, recognizing the efficiency and speed AI offers.

Mobility Defines the Shopping Experience
51% of survey responses confirmed people like to buy online and pick up in-store. A similar proportion confirmed checking to see if a specific item was available in-store before visiting. Retailers have to adapt to this new mobile reality.
KEY CONSUMER EXPERIENCE INSIGHTS

Convenience and Cost Savings Rule
73% of retail website buyers call convenience the top reason for impulse purchases (vs. 63% for researched purchases). Pricing factors also have a profound influence on buying decisions. Thus, retailers have to build convenience and compete on price.

Shipping Deals Drive Loyalty
31% of consumers say shipping discounts are their favorite benefit of loyalty programs, while 24% give the nod to points or rewards that provide freebies. Together, shipping deals and loyalty programs create hard-to-resist incentives.

Product Knowledge is Beyond Retailers’ Control
49% of survey responses cited search engines as the top way to find out about products for the first time. Shoppers also crave product insights from social media and review sites. While retailers cannot control external content, they should try to influence it.

Social Commerce is on the Rise
45% of survey responses said social media helped people find interesting products in the past three months, outpolling search engines’ 38%. Surpassing search engines at raising product awareness is an important step in the evolution of social commerce.
OPTIMIZING THE PATH TO PURCHASE

Awareness is the Crucial First Step
21% of responses named social as the best way to learn about products for the first time, less than half of the responses for search engines (49%). Awareness is a complex riddle because knowing about a product might not mean people want to buy it.

Browsers Prefer Mobile Devices
42% of consumers surveyed preferred mobile devices when browsing, vs. 30% for in-store visits and 28% for desktop computers. Savvy technology strategies can accelerate browsing and move buyers closer to a purchase.

Purchases Must Reflect Buyer Preferences
30% of survey respondents said reviews helped them feel comfortable enough to purchase, followed by product details (29%) and price comparisons (19%). Subtle differences in motivation help define how and why people buy.

Support Requires Effective Communication
76% of respondents said store visits provided the most satisfying way to communicate with brands, besting email (69%) and phone calls (66%). When contacting brands, people preferred Facebook by a 6-to-1 margin over Twitter and 5-to-1 over Instagram.
DMI’s Survey explores the shopping behaviors of today’s mobile-empowered consumers.

**WE SURVEYED 1,530 U.S. ADULTS.**

- Two-thirds had a family income below $100,000 per year
- Every respondent owned a smartphone: 57% Android and 43% iOS
- 57% lived in the faster-growing regions of the Southeast, Southwest and West.

**DEMOGRAPHIC BREAKDOWN**

**Gender:**
- 51% Female
- 49% Male

**Ages:**
- 18-24: 10%
- 25-34: 18%
- 35-44: 21%
- 45-54: 18%
- 55-64: 17%
- 65-74: 13%
- 75+: 3%

**Residence:**
- Midwest: 23%
- Northeast: 20%
- Southeast: 29%
- Southwest: 10%
- West: 16%

**Income (Thousands/Year):**
- <$24: 18%
- $25-$49: 19%
- $50-$74: 14%
- $75-$99: 16%
- $100-$124: 13%
- $125-$149: 9%
- $150-$174: 4%
When appropriate, questions asked respondents to exclude purchases from grocery stores, pharmacies and ride-sharing services. While these sales represent an important retail category, the purchases are far more frequent with much more repetition. Excluding these sales reveals the buying behaviors of a much broader spectrum of the retail environment.

We asked consumers about their shopping behaviors from multiple perspectives, such as:

- Becoming interested in a product even though they were not shopping
- The single most important variables that affect buying decisions
- All the ways they browse for products they’re interested in buying
- How impulse purchases differ from well-thought-out, researched purchases

Thus, findings vary depending on the scenarios we explored and the questions we asked.

**RESPONDENTS VS. RESPONSES**

Most of the survey questions seek a single reply from each of the 1530 survey participants. In these cases, we present the results as a percentage of respondents.

However, some questions ask participants to choose ‘all that apply.’ In these cases, we present results as a percentage of responses. The distinction is crucial because multiple-reply questions produce a much larger quantity of responses (e.g. 4500). Thus, the pertinent data is the percentage of total responses, not total participants. This is akin to a fractional-voting election, which is decided by total choices cast, not total voters.
I. INTRODUCTION:

CONSUMERS VASTLY PREFER BUYING IN STORES

“The death of the retail store is a myth,” says Michael Deittrick, DMI’s vice president for strategy and chief digital officer. “Enhancing in-store experiences still brings people in.”

DMI’s survey data agrees: When we asked people to state all the ways they bought something in the past 30 days, 88% of their responses cited in-store purchases, vs. 59% online and 38% retailers’ mobile apps. Moreover, 44% of respondents purchased either mostly in the store are all in-store, while 27% of respondents shopped mostly online or all online.

The survey revealed striking contrasts in the frequency of in-store and online purchases.

Online purchases come out ahead only in the once-a-month category, primarily because people are so much more likely to buy in a store either daily or weekly.

“Frictionless engagement from mobile to online and into the store — and vice versa — is still a critical component to transforming retail businesses.”

— Michael Deittrick, vice president for strategy and chief digital officer, DMI

When asked about purchases in the past year, 81% of survey responses cited physical stores, besting retailers websites and Amazon.com, both of which had 62%. In that same time frame, 46% of respondents said in-store was their favorite purchase method, vs. 19% for Amazon’s website and 15% for retailers’ websites.

Despite their strong in-store preferences, consumers use mobile devices in every phase of their shopping experience. DMI’s survey found. They scan search engines, compare prices and read reviews while stalking the aisles of their favorite stores. The most adept retailers use analytics, artificial intelligence, digital marketing and social media to elevate the in-store experience.

As people become more habituated to mobile and online engagement, e-commerce will keep growing. “But it will not overtake the in-store retail experience in the near future,” Deittrick says. ‘People still like to shop.”
They don’t shop the way they used to, however. Forward-looking stores don’t sell the way they used to, either.

Consider Best Buy: It sells electronic gear tailor-made for online shopping, but it is not giving ground to Amazon without a fight. Best Buy encourages in-store price matching, disrupting Amazon’s discount-driven strategy. Customers can close sales on the company website and pick up products in-store. They don’t have to wait two days and fear somebody will steal the package off their front porch. Product pages include reviews, specs and in-depth descriptions.

In short, Best Buy deploys the tools of digital transformation to create holistic shopping experiences on desktops, mobile devices and in-store. With Amazon gaining strength by the day, adding distribution centers and getting into brick-and-mortar retail, retailers have no choice but to adapt.

“Every retailer has got to figure out their position in the market, assess how they’re being disrupted and find the best way to become disruptors,” Deittrick says.
Amazon leaves large and small footprints on American markets, reeling in 5% of U.S. retail sales and about half of U.S. e-commerce, according to Chain Store Age magazine. Our survey found that 55% of respondents were Amazon Prime members, mirroring estimates from eMarketer and other online sources.

There’s nothing sinister about Amazon’s place in so many American households. “That 55% doesn’t buy from Amazon every day,” DMI’s Michael Deittrick notes. “Some Prime members just enjoy the free movies and buy on Amazon now and then if they don’t mind waiting a couple days for a shipment. It’s all about shopper preference. This concept of one program shifting everybody to online is misguided, and the data points that out.”

Indeed, our survey responses show Amazon is a fierce competitor that wins customers on price, service, convenience and content. By hitting these marks consistently, Amazon trains consumers to expect them all.

That’s a lesson no retailer can afford to overlook. Among our survey findings:

Amazon’s website and apps represented the most popular place to find out about interesting products when people weren’t shopping (49% of responses), ahead of social media (45%), search engines (38%) and email (27%). Amazon’s vast array of reviews, customer Q&As and product recommendations reveal the power of content.

Why do people buy on Amazon? Here are survey respondents’ top four reasons:

- **FREE SHIPPING** 31%
- **RAPID DELIVERY** 19%
- **FAMILIAR PURCHASE EXPERIENCE** 14%
- **CUSTOMER SERVICE** 11%
These stats for impulse buys were essentially identical to the rationales for heavily researched purchases.

“People can find pretty much anything they want on Amazon, usually at the best price,” Deittrick says. “All retailers have to embrace this customer experience model: No-hassle returns. When you make a mistake, you own it with the customer.”

Though in-store retail has built-in advantages over Amazon, complacency is risky. Amazon has mastered logistics, storage, distribution and online sales. Its purchase of Whole Foods marks a significant foray into brick-and-mortar retail. The company is adding distribution centers with an eye on same-day delivery.

Shipping may soon become a crucial component of in-store retailing. “Some grocery stores are disrupting Amazon because it was selling people canned goods online and shipping to them in two days,” Deittrick says. “Now you have people who will go out, shop for you and bring your groceries to you.”

Similarly, in-store price-matching encourages more abandoned shopping carts on Amazon.com. Of course, every retail company has to find its own way to model Amazon’s expertise. “They can start by doing what Amazon does best,” Deittrick advises. “Get people what they want as soon as possible. Always compete on price.”

And never stop improving the customer experience.

“People can find pretty much anything they want on Amazon, usually at the best price,” Deittrick says. “All retailers have to embrace this customer experience model: No-hassle returns. When you make a mistake, you own it with the customer.”

Michael Deittrick, vice president for strategy and chief digital officer, DMI

To compete with Amazon, retailers have to embrace this customer experience model. No-hassle returns. When you make a mistake, you own it with the customer.

What Buyers Want: A DMI Consumer Survey
III.

AI IS THE NEW REALITY IN RETAIL

Advanced learning algorithms are transforming the retail sector. Brick-and-mortar retailers use image recognition to track shoppers’ movements through their stores. Merging multiple data sources allows retailers to weave together data on weather, demographics and consumer preferences to optimize all phases of their operations.

“AI has reached an inflection point,” says Niraj Patel, DMI’s lead on artificial intelligence and machine learning initiatives. “There are enough AI implementations now that retailers can see the real value of these algorithms.”

The big question mark for retail is the role of AI in customer service. DMI’s survey found a mix of satisfaction and suspicion. Just over one-third of our survey respondents (34%) said they had encountered AI in customer service, while the other two-thirds said either they had not or they couldn’t be sure. More than half (54%) of those who encountered AI were either satisfied or very satisfied with the experience, more than double the dissatisfied contingent (26%).

We asked survey participants about their perceptions of AI in customer service. In the strongest responses, 70% either agreed or strongly agreed with the statement “I’d rather connect directly with someone who can empathize with me.” Moreover, 59% agreed or strongly agreed that AI isn’t as helpful as an employee would be. Meanwhile, 44% agreed or strongly agreed that an AI-driven service would be faster than working with a human. Thus, consumers are starting to see the value — and the tradeoffs — of automation.

How would our survey participants prefer to engage with a retailer’s customer service program — employee, AI chatbot or no preference? They overwhelmingly preferred employees. For instance, people needing a refund after being mischarged prefer personal service over a chatbot by a factor of 19-to-1. By contrast, those who needed more product information or wanted to make sure the product was available in their size had an employee/AI preference ratio of just 4-to-1.

<table>
<thead>
<tr>
<th>CUSTOMER SERVICE PREFERENCE</th>
<th>EMPLOYEE</th>
<th>AI CHATBOT</th>
<th>NO PREF.</th>
<th>EMPLOYEE-AI RATIO</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am looking to make sure the product is available in my size before purchasing</td>
<td>51%</td>
<td>12%</td>
<td>37%</td>
<td>4:1</td>
</tr>
<tr>
<td>I need help returning an item I purchased</td>
<td>64%</td>
<td>7%</td>
<td>29%</td>
<td>9:1</td>
</tr>
<tr>
<td>I am unsatisfied with the quality of an item I purchased</td>
<td>72%</td>
<td>5%</td>
<td>24%</td>
<td>14:1</td>
</tr>
<tr>
<td>I was mischarged for an item and need a refund</td>
<td>76%</td>
<td>4%</td>
<td>20%</td>
<td>19:1</td>
</tr>
</tbody>
</table>
While survey respondents seemed skeptical about AI in the scenarios outlined here, the reality in retail is that natural language processing technology gets better every day. Thus, it’s inevitable that chatbots become increasingly effective in a host of customer service scenarios. Moreover, AI will help human employees produce faster service outcomes for customers, but bots will never replace people.

Our survey also asked people about the kinds of personal information they would expect a retailer to retain and to use in a future automated customer experience. Names (69%), account numbers (63%) and phone numbers (56%) topped the list. Nearly half the responses said an address should be retained (48%), while just over four out of 10 stated previous purchases (42%) should be included. Fewer than one-third of responses said credit card numbers should be retained.

Next, we asked which of these kinds of personal information would make consumers feel uncomfortable if it showed up in an automated customer experience. Credit card information came in first at 57%. The remaining properly,’ Patel says. “An AI engine has to be able to identify when a consumer is dissatisfied and move them to a human right away.”

Patel advocates always involving humans in an AI implementation. “Humans have to be in the loop early on to start producing gains,” he says. “The humans essentially train the bots to make themselves more productive.”

Amazon Prime members in DMI’s survey were more aware they’re dealing with AI than the non-members we surveyed (40% vs. 34%). They also expressed higher satisfaction with AI than the overall survey population (57% vs. 54%). This is just one example of Amazon setting expectations for the customer experience that will soon apply to all retailers.

YOUNGER AND MORE BOT-FRIENDLY

25- to 44-year-olds were notably more aware of their encounters with AI (41% vs. 34%). And they also expressed more satisfaction (66% vs. 54%) with AI, and were more likely to consider it more efficient (57% vs. 44%).
IV. ALL COMMERCE IS MOBILE

Today’s shoppers take their mobile devices with them everywhere — especially into their favorite stores. Apps and websites tell them what’s in stock and which products get the best reviews.

Our survey participants are embracing this shopping phenomenon, with 58% using their smartphones in physical stores in the past month to help find products, learn more about them or make the purchase.

We dived deeper into the topic with this question: Have you ever done any of the following?

- Bought or reserved an item online and picked it up in-store or curbside: 51%
- Checked to see if a specific item was available in-store before visiting: 51%
- Shopped a specific store’s inventory online before visiting: 48%
- Made an appointment with a stylist in-store: 17%
- Had a virtual (e.g. phone, Skype) meeting with a stylist or advisor: 9%
Mobile commerce isn’t confined to apps and responsive websites anymore. “There’s so much discussion about headless commerce, but retailers should also consider distributed commerce,” says Paula Moniz, lead for DMI’s customer experience practice. Moniz, who helped organize our survey, noted that retailers need to accommodate people who are ready to transact now — on a site like Instagram, for example — without ever visiting a store’s physical location or website.

Indeed, as commerce grows more fluid and retailers strive to meet customers where they are, the desktop seems less relevant to e-commerce. Our survey found that desktops failed to rank first for browsing, customer service and making a purchase.

**Which Device or Method Provides the Best Shopping Experience?**

**Browsing**
- 42% Mobile
- 30% In-Store
- 28% Desktop

**Customer Service**
- 28% Mobile
- 25% In-Store
- 18% Desktop

**Making a Purchase**
- 47% In-Store
- 28% Desktop
- 24% Mobile

**Buying Online, Picking Up In-Store**

DMI asked, “If it was available at every store, how frequently would you want to buy or reserve something online and pick it up in-store or curbside?” The replies:

- 10% would do it with every purchase, 29% would do it frequently and 24% would do it half the time.
- 27% would do it infrequently and 9% never would.

**Mobile Apps: How Many is Enough?**

We asked consumers how many mobile apps they had on their smartphones. We found that:

- 17 had none
- 41% had 1-2
- 30% had 3-5
- 8% had 5-7
- 5% had 8+

The sharp drop-off after 3-5 mobile apps suggests consumers resist loading new apps on their phones past a certain point.

**Prime Perspective**

Use of mobile devices in a store is significantly higher among Amazon Prime members (65%) than among non-members (35%).
Today’s mobile reality faces one nagging challenge: reluctance to close sales on a mobile device. People vastly prefer the familiarity and convenience of closing the sale in the store or on their desktop computers. They’d much rather browse and research at leisure on a phone or tablet.

Moniz offers a suggestion for getting more people to buy on their mobile devices:

“Retailers should look closely at how to convert mobile browsing into transactions at higher rates. Historically, shoppers drop off or change channels to purchase, but that doesn’t need to be the case,” she recalls. “Some retailers solve this in mobile web by pulling in form fields like your address or credit card number that can be saved on your phone. This makes it more like a native experience where your account information is saved.” In the same vein, 24% of survey respondents prefer to use PayPal, which also expedites mobile payments.

The key to serving the mobile marketplace is meeting people where they are. And remember they’re on mobile to do much more than buy.

“Don’t just focus on the transaction. You have to look at the whole journey,” Moniz says. “The old saying is, ‘fish where the fish are.’ The same thing goes for shopping behavior. It’s really hard to create behavior, but if you follow the behaviors your users exhibit, then you’ll have a lot more success.”

— Paula Moniz, customer experience lead, DMI
V. MASTERING THE BUYING EXPERIENCE

CONVENIENCE AND COST SAVINGS RULE

Today’s mobile consumers expect speed, convenience and competitive pricing, DMI’s survey data shows.

Survey respondents made convenience the fulcrum of their shopping experience in researched and impulse purchases alike. They found in-store purchases most convenient, but they also craved convenience on websites, mobile apps and Amazon.com.

PUTTING A PREMIUM ON CONVENIENCE

RESEARCHED PURCHASES

Convenience is the prime motivator for:

- 65% of retail website buyers
- 43% of Amazon.com buyers
- 29% of retailer mobile app buyers

IMPULSE PURCHASES

Convenience is the prime motivator for:

- 73% of retail website buyers
- 52% of Amazon.com buyers
- 39% of retailer mobile app buyers

“Make sure you have methods in-store and online to engage consumers where they are, when they are ready to buy, with a combination of rich, engaging content and services that make them want to shop with you versus somebody else.”

— Stephen Carvelli, principal for digital and innovation, DMI

Though it’s easy to assume discounters like Amazon, Target and Walmart have made price the biggest priority for consumers, the reality is more nuanced. Price issues ranked among the four most important kinds of information people need to feel comfortable making a purchase, according to our survey, but they didn’t top the list. Price comparisons ranked second for impulse purchases and third for researched purchases.
CONSUMERS WANT MORE CONVENIENCE

We asked survey participants how influential each of these factors would be to securing more future purchases directly through companies’ stores or websites. The percentages cite total responses of either influential or very influential.

CONNECTED SHOPPERS INFLUENCED BY CONTENT MORE THAN PRICE

Top four factors buyers need to feel comfortable making a purchase.

**RESEARCHED PURCHASES**

- **30% Reviews**
- **29% Product details**
- **19% Price comparisons**
- **10% Best offer on price or shipping**

**IMPULSE PURCHASES**

- **30% Product details**
- **29% Price comparisons**
- **19% Reviews**
- **10% Best offer on price or shipping**

“Retailers have to create convenience for consumers,” says Stephen Carvelli, DMI’s principal for digital and innovation. “Make sure you have methods in-store and online to engage consumers where they are, when they are ready to buy, with a combination of rich, engaging content and services that make them want to shop with you versus somebody else.”

Carvelli cites the example of a Sam’s Club mobile app, which has a scan-and-go feature that lets club members find products in a store, scan data into the app and check out all in the same place. When they leave the store, they show a digital receipt on their phone to the people minding the entrance and they are on their way. In a time when mobile apps tend to frustrate people with too many places to enter data on tiny screens, this kind of streamlined checkout is just what retailers need to disrupt Amazon.

“Over 90% of the people that use it to transact once will use it again,” Carvelli says. “Once people adopt it, the convenience becomes addictive.”

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>81%</td>
<td>Hassle-free, easy returns</td>
</tr>
<tr>
<td>80%</td>
<td>Gave ability to earn rewards</td>
</tr>
<tr>
<td>77%</td>
<td>Guaranteed delivery</td>
</tr>
<tr>
<td>77%</td>
<td>Faster and better customer service</td>
</tr>
<tr>
<td>73%</td>
<td>Make it faster to checkout</td>
</tr>
</tbody>
</table>
VI.

SHIPPING DEALS DRIVE LOYALTY

Shipping deals and loyalty programs are so intertwined in the minds of consumers that it’s difficult to think of them as separate services or features. When we asked consumers which services they found appealing or very appealing, shipping deals and components of loyalty programs were extremely popular.

WHAT COULD A RETAILER DO TO SECURE MORE PURCHASES?

Percentage who found these loyalty program features appealing or very appealing.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free shipping</td>
<td>87%</td>
</tr>
<tr>
<td>Ability to earn rewards</td>
<td>80%</td>
</tr>
<tr>
<td>Shipping discounts or delivery guarantees</td>
<td>80%</td>
</tr>
</tbody>
</table>

“Free shipping is yet another way Amazon has trained the market to shop. Buyers expect it, and may leave if you don’t provide it.”

— Paula Moniz, customer experience lead, DMI

Shipping is central to the appeal of buying from Amazon. When we asked people why they bought from Amazon, free shipping topped the list.

RESEARCHED PURCHASES

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I know I will get free shipping</td>
<td>32%</td>
</tr>
<tr>
<td>I know I will get the item quickly</td>
<td>18%</td>
</tr>
<tr>
<td>I know Amazon has good customer service</td>
<td>15%</td>
</tr>
</tbody>
</table>

IMPULSE PURCHASES

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I know I will get free shipping</td>
<td>31%</td>
</tr>
<tr>
<td>I know I will get the item quickly</td>
<td>19%</td>
</tr>
<tr>
<td>I know Amazon has good customer service</td>
<td>14%</td>
</tr>
</tbody>
</table>
Thus, it was no surprise that Amazon fused shipping and membership via Prime. “Amazon Prime transformed the Costco model into an online model,” DMI’s Michael Deittrick says. Instead of selling bulk quantities, Amazon leveraged its logistics capabilities and two-day shipping to make Prime more appealing. Adding free movies, music and other perks made Prime a model loyalty program.

We asked survey participants to name the single most appealing benefit of loyalty programs. Again, shipping came out on top.

DMI’s Paula Moniz advises retail brands to take a hard look at the time and effort they invest in less-popular loyalty program features. Free and guaranteed shipping may turn out to be a better way to improve loyalty and drive more purchases.

“Free shipping is yet another way Amazon has trained the market to shop,” Moniz says. “Buyers expect it, and may leave if you don’t provide them with it.”

What Buyers Want: A DMI Consumer Survey

<table>
<thead>
<tr>
<th>Benefit</th>
<th>VERY APPEALING</th>
<th>APPEALING</th>
<th>COMBINED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Points that can be converted into spending</td>
<td>52%</td>
<td>32%</td>
<td>84%</td>
</tr>
<tr>
<td>Shipping benefits like free shipping or guaranteed two-day shipping</td>
<td>48%</td>
<td>34%</td>
<td>82%</td>
</tr>
<tr>
<td>Ability to earn points or rewards that can be redeemed for discounts or freebies</td>
<td>41%</td>
<td>36%</td>
<td>77%</td>
</tr>
<tr>
<td>Exclusive discounts for members</td>
<td>40%</td>
<td>36%</td>
<td>76%</td>
</tr>
<tr>
<td>Earning more points faster with higher levels</td>
<td>23%</td>
<td>32%</td>
<td>55%</td>
</tr>
<tr>
<td>Invitations or access to exclusive events</td>
<td>21%</td>
<td>32%</td>
<td>53%</td>
</tr>
</tbody>
</table>

When asked to name their favorite membership program features, survey respondents showed only a slight preference for spending points over shipping benefits.
PRODUCT KNOWLEDGE IS BEYOND RETAILERS’ CONTROL

Consumers find information about products from a galaxy of sources where retailers and brands have zero veto power. That presents a distinct strategic and tactical challenge for brands and retailers alike.

We asked survey participants to name their favorite sources for first hearing about new products. The table below breaks out five most-popular information sources that retailers may be able to influence but certainly cannot control:

**TOP 5 INFORMATION SOURCES RETAILERS DO NOT CONTROL**

Preferences for finding out about products for the first time:

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search engines (i.e. Google)</td>
<td>49%</td>
</tr>
<tr>
<td>Amazon</td>
<td>28%</td>
</tr>
<tr>
<td>A review website (i.e. Consumer Reports)</td>
<td>27%</td>
</tr>
<tr>
<td>Social media (i.e. Instagram, Facebook)</td>
<td>21%</td>
</tr>
<tr>
<td>Friends (word of mouth)</td>
<td>21%</td>
</tr>
</tbody>
</table>
Show-Rooming and Web-Rooming

The abundance of content from myriad online sources enables another phenomenon beyond retailers’ control: show-rooming, where people scan products in the store and buy them online. As a retailer, it’s galling to know somebody can pore over a product on your showroom floor and buy it on their phone from a competitor without even leaving your store. And, of course, there’s web-rooming, where people use product information from Amazon.com on their phone to help buy a product in their local Home Depot.

“You just have to accept the fact that while people are shopping in your store, they’re also looking online for the same items — scanning for better delivery methods, services, prices and so on,” says Stephen Carvelli, principal for digital and innovation at DMI.

Consider the case of a review website like CNET. When a headline on Google tells you you’re about to click on the 10 best over-the-ear wireless headphones, you expect that writers and editors have combined knowledge, judgment and real-world observation to provide a credible assessment to readers and consumers.

“People trust that process,” says Elisabeth Bradley, vice president for connected commerce solutions at DMI. “That’s why making sure your products get into those top-10 lists is so important. Is it life-changing? Probably not. But the reality is there’s a lot of channels out there and there’s a lot of places that consumers are spending time.” Moreover, bloggers, podcaster and YouTubers often monetize their operations with affiliate links that pay referral fees. “You have to make sure you have a good referral program strategy,” Bradley says.

Customer experience transcends shopping and buying. “It’s also your marketing strategy,” Bradley says. “It’s your voice in the community and your dedication to a company vision, strategy and direction.”

The goal is to build authenticity that strengthens retailers’ bond to their customers in a chaotic online environment. “I think about Patagonia as a brand,” Bradley says. “Their corporate actions stand behind the company’s vision and mission. Their buying and supply chains stand behind that vision. And their social media presence fits what consumers want from their brand.”

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Social commerce is growing

Social platforms like Facebook, Instagram and Pinterest have evolved into crucial conduits of product knowledge because consumers trust the judgment of people they feel close to. That trust is translating into transactions.

“With social commerce, you can find shoppers where they are and sell to them there — rather than waiting for them to come to your properties.”

— Paula Moniz, customer experience lead, DMI

Moreover, social media is rivaling search engines for generating product awareness. Our survey question asking people to name all the places where they heard about interesting products in the past three months revealed that social platforms bested search engines in total responses. The gap bulged when we broke down the responses by Amazon Prime and 25-44 age group membership.

“Social platforms outpolling search shows the potential of distributed commerce,” DMI’s Paula Moniz says. “With social commerce, you can find shoppers where they are and sell to them in that moment — rather than requiring them to come to your properties.”

<table>
<thead>
<tr>
<th></th>
<th>All Responses</th>
<th>Amazon Prime Members</th>
<th>Age 25-44</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media</td>
<td>45%</td>
<td>51%</td>
<td>59%</td>
</tr>
<tr>
<td>Search Engines</td>
<td>38%</td>
<td>37%</td>
<td>41%</td>
</tr>
</tbody>
</table>
Moniz notes that analytics data can help retailers zero in on the impact of their social media presence. “A lot depends on the social platform you’re using and the products you put in front of people,” she says. “From an analytics perspective, you have to look at who responds to your posts.” You can measure things like whether people scroll down, click on ‘shop now’ buttons or visit pages on your website.

The rise of distributed commerce enables retail newcomers like MVMT Watches to bypass the massive infrastructure investments that constrain legacy retailers. “Sure, they have a website,” Moniz notes. “But they’re really selling on social.”

Social selling is in its early phases on a macro level. But it’s showing impressive growth in specific sectors.

“It’s pretty clear that social media is playing a massive role, depending on the space you’re talking about and the demographic,” DMI’s Stephen Carvelli says. “It’s feeding the cosmetics industry in a big-time way, driving a huge resurgence for brands like Ulta and Sephora against disruption from Amazon.”

### PRIMED FOR SOCIAL COMMERCE

Amazon Prime members and 25- to 44-year-olds showed deeper engagement in social media than the full population of consumers we surveyed.

We asked them to identify all the social channels they prefer to browse or learn more about an item they are interested in purchasing. The age 25-44 responses showed the largest divergence.

<table>
<thead>
<tr>
<th>Social Channel</th>
<th>ALL</th>
<th>Amazon Prime Members</th>
<th>Age 25-44</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>19%</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>Friends</td>
<td>18%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Instagram</td>
<td>11%</td>
<td>14%</td>
<td>18%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>8%</td>
<td>10%</td>
<td>11%</td>
</tr>
</tbody>
</table>
IX. OPTIMIZING THE PATH TO PURCHASE:

Awareness > Browsing > Purchase > Support

Awareness: How Consumers Want to Find Out About Products

The teeming multitudes of content sources and media channels make product awareness a tricky business. For instance, the previous section of this report suggested social media can drive more awareness than search engines — if the consumer hasn’t started shopping. But how do consumers prefer to learn about products for the first time?

To answer that question we asked about all the places people preferred to get product information over the past year. Search engines (49%) led all preferences, while store visits (30%), Amazon (28%), multi-brand retailer websites (28%) and review websites (27%) rounded out the top five. Social media (21%) ranked seventh.

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Engines (i.e. Google)</td>
<td>49%</td>
</tr>
<tr>
<td>A visit to a physical store</td>
<td>30%</td>
</tr>
<tr>
<td>Amazon</td>
<td>28%</td>
</tr>
<tr>
<td>A multibrand retailers website (i.e. Target, Nordstrom)</td>
<td>28%</td>
</tr>
<tr>
<td>A review website (i.e. Consumer reports)</td>
<td>27%</td>
</tr>
<tr>
<td>Friends (words of mouth)</td>
<td>21%</td>
</tr>
<tr>
<td>Social media (i.e. Instagram, Facebook)</td>
<td>21%</td>
</tr>
</tbody>
</table>

Thus, awareness is more than reaching out to influencers. It’s aligning your shopping experience with consumer preferences for learning about products. Here, Amazon’s third-place ranking may well understate its importance.

‘An Amazon strategy is mandatory,’ DMI’s Elisabeth Bradley says. Even companies not selling on Amazon have to deal with its impact. ‘You have to understand how Amazon is mapping experiences and customer journeys, because that’s what the consumer will expect.’

Online retailers have to weave Amazon into their SEO operations. ‘When you search for a product on Google, Amazon is at the top of the list almost every time,’ Bradley notes. Your digital marketing team needs to master the nuances of Google and Amazon because their algorithms and policies can change with little warning.

Raising awareness means finding the channels and platforms where your most likely consumers hang out. ‘Somebody asked me the other day whether an insurance company needs a YouTube channel and strategy,’ Bradley recalls. ‘Is that the right place to invest a lot of time and energy? A lot of people spend a lot of time on YouTube. But are they the ones you’re trying to reach? Maybe it does make sense. You have to do the research and understand where the consumers are.’
SOCIAL MEDIA IS THE NEW WORD OF MOUTH

Our survey found that social media has reshuffled the process of getting word-of-mouth recommendations from friends. When we asked people about products that captured their attention in recent months even when they had no intention of buying anything, social media came out on top by a 2-to-1 margin.

WHERE DID YOU FIND OUT ABOUT A PRODUCT THAT CAPTURED YOUR ATTENTION IN THE PAST THREE MONTHS?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>45%</td>
<td>Social media (i.e. Facebook, Instagram, Pinterest)</td>
</tr>
<tr>
<td>21%</td>
<td>Friends (word of mouth)</td>
</tr>
</tbody>
</table>

In the browsing phase, when consumers want to find out more about a product, word-of-mouth received less than half the combined support for Facebook, Pinterest and Instagram.

HOW DO YOU WANT TO BROWSE OR LEARN MORE ABOUT AN ITEM YOU’RE INTERESTED IN BUYING?

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>Facebook</td>
</tr>
<tr>
<td>18%</td>
<td>Friends (word of mouth)</td>
</tr>
<tr>
<td>11%</td>
<td>Instagram</td>
</tr>
<tr>
<td>8%</td>
<td>Pinterest</td>
</tr>
</tbody>
</table>

One critical awareness challenge is connecting with online communities and conveying authenticity in a way that attracts consumers to your brand rather than repelling them with a sales pitch.

You have to be strategic because each brand attracts a unique gathering of people and perspectives. “Sephora communities are much different than Fleet Farm communities,” says Justin Burrows, a senior e-commerce consultant at DMI. “One sells cosmetics, the other sells firearms and cattle feeders. All these communities are very passionate, but in very different ways.”

Burrows notes that a lot of e-commerce companies rely on email lists because they can push a button and see results. Social channels and community outreach are tougher because they require authentic human interactions.

“If you don’t commit the resources, it’s not going to give you back what you need,” Burrows says.
X. BROWSING:
SPEEDING SHOPPERS CLOSER TO PURCHASE

The browsing phase of the path to purchase is as much about devices as it is about consumer desires. Mobile devices play a pivotal role in optimizing the browsing process and making sure you’re giving consumers what they want, when they want it.

When browsing and researching products, 42% of the consumers we surveyed preferred mobile devices versus 30% for in-store visits and 28% for desktop computers.

“IT’S AMAZING HOW MUCH FURTHER ALONG IN THE BROWSING PROCESS YOU CAN GET SOMEBODY BY KNOWING WHAT THEY’RE LOOKING FOR.”
—Justin Burrows, senior e-commerce consultant, DMI

That’s not surprising: a phone or tablet lets people kick back and conduct research at their convenience — on the bus, at the kitchen counter or in the dentist’s waiting room. Free from the pressure to make a buying decision, they can take their time finding the precise fit for their needs.

JUST LOOKING OR BROWSING

MOBILE 42%

IN-STORE 30%

DESKTOP 28%

Search Engine 53%

A store visit 43%

A singly brand retailer’s website 33%

A multibrand retailer’s website 27%

Facebook 19%

Friends 18%

Instagram 11%

Pinterest 8%
As an organic extension of awareness, browsing reinforces the need for a solid Amazon strategy, comprehensive SEO and so on. Indeed, the top ranking for search engines demonstrates their central role in awareness and browsing.

How do consumers prefer to browse or learn more about products they’re interested in purchasing? In our survey, the top five responses were search engines (63%), store visits (43%), single-brand websites (33%), multi-brand websites (27%) and Facebook (19%). Combining the responses for Facebook, Pinterest and Instagram (38%) shows social media is crucial in the browsing phase.

Brand websites represent another critical opportunity for retailers because they control the browsing experience. That lets brands delight customers and speed them closer to a transaction.

“It’s amazing how much further along in the browsing process you can get somebody by knowing what they’re looking for,” DMI’s Justin Burrows says. Auto-fill, which Google uses to great effect by showing users a collection of alternate search terms, illustrates one way to turbocharge browsing.

“Let’s say you have an auto parts website and I’m the customer,” Burrows says. “You already know my brand of pickup truck because I entered that in my online account. If I’m searching for an exhaust manifold, I can type the letter ‘e’ into the website search field and auto-fill gives me a list of exhaust manifolds for my make and model.” Why doesn’t typing “e” return a list of engine mounts? Because pattern-matching algorithms and behavioral tracking help the search engine understand what searchers want and help them find it quickly.

Don’t overlook the basics for helping people browse. “You have to understand that people are going to find information if they want it,” DMI’s Elisabeth Bradley says. Early in the browsing process, they’re looking for product reviews. Later on, they may want to look at instruction manuals or spare-parts catalogs.

“Sometimes, it just takes too many clicks for a consumer to find that PDF with the product information,” Bradley says. Brands have to craft customer experiences that train consumers to expect that product information will be available. And they need to help them find it.

Making the Most of Online User Accounts

DMI found that 46% of the consumers surveyed use online accounts for all or most of their purchases. Account profile data is an excellent resource for brands aiming to fine-tune their customer experience. Thus, encouraging more people to open accounts and use them regularly is a savvy strategy.

Our survey revealed critical reasons why people resist creating user accounts:

➤ 32% don’t want marketing emails.
➤ 24% are nervous about providing personal information.
➤ 22% say it takes too long.
➤ 13% say they’re not planning to buy from the store again.

“If brands want to tap the value of customer accounts, they need to make the process faster and easier,” DMI’s Paula Moniz says. They can do that by:

➤ Doing a better job of telling customers how they’ll communicate with them.
➤ Using email strategy to add value for customers and not spam them.
➤ Giving customers control over the frequency and topics of emails.
XI. PURCHASE: ALIGNING WITH BUYER PRIORITIES

Getting buyers to “yes” means giving them enough information in the awareness and browsing phases to feel comfortable making a purchase. When we asked consumers to name the single most important type of information they need to achieve that comfort level, the top three responses confirmed this view: reviews (30%), product details (29%) and price comparisons (19%).

Where people buy is another crucial variable. When we asked people to select their favorite way to purchase over the past year, in-store came in first (46%), followed by Amazon’s website (19%) and retailer websites (15%). Mobile transactions were far less popular, with Amazon’s app (7%) and retail mobile apps (6%) scoring highest.

“Every year, very consistently, more and more actual conversions are happening on mobile devices. Maybe you’re not that comfortable buying a cruise right now on your phone, but you probably will be.”

— Stephen Carvelli, principal for digital and innovation, DMI.

Carvelli notes the rising popularity of mobile systems like Apple Pay and the consistent support for PayPal. These and other payment methods take many of the extra steps out of mobile purchases. “It’s just an adoption thing,” he says of mobile payments. “It takes time, but it’s going to happen.”

The why behind people’s purchases often comes down to subtle differences in motivation depending on whether they deeply research a product or buy it on impulse. To reveal these kinds of insights, we asked people why they purchased from four locations — retailers’ websites, in stores, via mobile apps and on Amazon. Then we contrasted their views on well-researched and impulse buys.

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WHY DO YOU BUY IN THE FOLLOWING PLACES?
(Retailers' websites, in-store, mobile apps, Amazon)

- It’s most convenient for me
- I feel more secure making the purchase this way
- I will likely receive a discount or free shipping
- I already have an account with my information saved
- I can have the item immediately

Top 3 Responses Broken Down by Heavily Researched vs. Impulse Purchases

<table>
<thead>
<tr>
<th>RESEARCHED</th>
<th>IMPULSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retailer’s website</td>
<td>Retailer’s website</td>
</tr>
<tr>
<td>most convenient</td>
<td>most convenient</td>
</tr>
<tr>
<td>65%</td>
<td>73%</td>
</tr>
<tr>
<td>more secure</td>
<td>discount/free shipping</td>
</tr>
<tr>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>discount/free shipping</td>
<td>more secure</td>
</tr>
<tr>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>In-store</td>
<td>In-store</td>
</tr>
<tr>
<td>more secure</td>
<td>most convenient</td>
</tr>
<tr>
<td>48%</td>
<td>34%</td>
</tr>
<tr>
<td>most convenient</td>
<td>have it immediately</td>
</tr>
<tr>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>have it immediately</td>
<td>more secure</td>
</tr>
<tr>
<td>19%</td>
<td>25%</td>
</tr>
<tr>
<td>On mobile app</td>
<td>On mobile app</td>
</tr>
<tr>
<td>free/discount shipping</td>
<td>most convenient</td>
</tr>
<tr>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>most convenient</td>
<td>more secure</td>
</tr>
<tr>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>more secure</td>
<td>free/discount shipping</td>
</tr>
<tr>
<td>22%</td>
<td>24%</td>
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<tr>
<td>On Amazon</td>
<td>On Amazon</td>
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<tr>
<td>most convenient</td>
<td>most convenient</td>
</tr>
<tr>
<td>43%</td>
<td>52%</td>
</tr>
<tr>
<td>free/discount shipping</td>
<td>free/discount shipping</td>
</tr>
<tr>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>more secure</td>
<td>account info saved</td>
</tr>
<tr>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Top 3 Responses Broken Down by Heavily Researched vs. Impulse Purchases
WHERE MOBILE BUYING IS MORE POPULAR

Though mobile devices are typically not people’s favorite way to close a transaction, according to DMI’s survey, adoption is notably higher among Amazon Prime members and people in the 25-44 age group. When we asked consumers to state all the ways they closed a transaction in the past year, clear distinctions emerged:

- Researched purchases: The top “most convenient” responses went to retail websites (65%) and Amazon (43%), while top “more secure” votes went to physical stores (48%) and mobile apps (22%).
- Impulse purchase: Retail websites (73%) and Amazon (52%) scored the highest convenience votes. The top “more secure” votes went to stores (25%) and mobile apps (24%).

Thus, convenience is a higher priority for impulse purchases, while security is a stronger motivator for buying in stores.

Every retailer has to optimize buying decisions to match these kinds of differences in consumers’ motivations. For instance, do they prioritize value over the buying experience?

“There’s a very real difference between buying from Tiffany’s and buying from Dollar General,” DMI’s Elisabeth Bradley says. “You can have a good buying experience at both.”

Every retail variable complicates the purchase process. Consumer behavior provides clarity. “Knowing what your consumer wants and how they’re buying has to be the core of your strategy,” Bradley says.
SUPPORT REQUIRES EFFECTIVE COMMUNICATION

Strong customer support converts the path to purchase into a cycle that perpetually refreshes. While AI and the advanced algorithms we profiled earlier in this report represent the future of customer service, it’s important to stick to the everyday fundamentals: communicating with customers in ways that meet their satisfaction.

We asked consumers about their satisfaction with communicating to brands over the past 12 months. In-store visits (76%) netted the most “satisfied” and very “satisfied responses,” with email (59%), phone calls (56%) filling out the top three. Social media (27%), texting (26%) and smart speakers (20%) filled the bottom three. The survey saw substantial proportions of “not applicable” responses (not used in the past year) for mobile apps (60%), social media (48%), smart speaker/voice assistants (47%) and texting (37%).

Of those who communicated via social media, Facebook (47%) and Facebook Messenger (16%) came out on top, vs. Instagram (12%) and Twitter (10%). Facebook’s combined 63% represents a 5-to-1 preference over Instagram and a 6-to-1 preference over Twitter.

Among those who used social media to contact companies, a majority (57%) said the companies responded within 1 to 2 hours — with 26% enjoying immediate
WHO’S INTO SMART SPEAKERS?

Five years ago, this product category barely existed. The fact that 27% of all of survey respondents already have a smart speaker (Amazon Echo, Google Home, etc.) in a such a short timespan suggests strong potential. Moreover, 41% of Amazon Prime members and 39% of 25- to 44-year-olds said they owned one. Thus, digitally engaged consumers and those under age 45 represent the early adopters.

A combined 20% of respondents were either satisfied or very satisfied with using their smart speaker to communicate with a company. And when we asked consumers about things retailers could do to secure a purchase, 40% said giving them shopping alternatives like smart speakers or social media would be either influential or very influential.

All these numbers must be put in the context of better alternatives. Smart speakers pleased 20% of our respondents when communicating with companies, but only a smattering of our respondents used them for shopping or buying. Meanwhile, 56% preferred phone calls for product support.

Where should you put these feature-focused technologies to work? ‘A retailer might think, ‘we need to enable smart speakers to make the transaction,’ but that might not be how your shopper is behaving today,’ DMI’s Paula Moniz says. ‘Always follow the user.’

Smart Speaker Owners

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>27%</td>
<td>All</td>
</tr>
<tr>
<td>41%</td>
<td>Amazon Prime Members</td>
</tr>
<tr>
<td>39%</td>
<td>Age 25-44</td>
</tr>
</tbody>
</table>

With social media, brands have to draw clear lines between support and marketing. ‘If you’re using social media for community support, it needs to be monitored and it needs to be responsive,’ she says. ‘You can’t go halfway.’

Social is where the consumers are today. ‘You know they’re going to be there, that they’re going to ask questions and they’re going to connect with you,’ Bradley adds. Sound strategy and strong execution are central to making those connections productive and profitable.
For all the challenges besetting some retail sectors, in-store retail is a good business to be in. Across multiple browsing and buying scenarios, consumers in our survey prized the convenience, security and hands-on appeal of shopping in stores. Sure, people bring their phones into stores to streamline their buying decisions. A few might even buy from the competition before leaving the store they’re standing in.

That’s the reality of 2019. The years to come are something else. Amazon’s status as an e-commerce behemoth will keep elevating service, selection and content for consumers — training them to expect a certain level of excellence and obliging all retailers to do the same.

“Right now the death of in-store retail is a myth,” DMI’s Michael Deittrick says. But Amazon is chipping away at that myth. “They already own online retail and distribution. They’re moving into delivery. The only thing they don’t own is in-store retail, and they have all the pieces in place to make that work.”

The question for everybody else is whether you have the pieces in place to save your business. Are you putting AI to work streamlining customer service and optimizing people’s in-store experiences? Are you deploying advanced analytics and data science for precision-targeted marketing? Are you using data to develop a comprehensive understanding of your customers?

All of these strategies will be mandatory to keep customers choosing you instead of Amazon.

“If you don’t start focusing on empowering the technologies your business needs to defend against Amazon, it’s over,” Deittrick says. “Amazon wins.”
MEET DMI.

We are not in an evolution of technology, but a revolution of mindset. We help our clients navigate this revolution by taking a human-centric, mobile-first approach to disrupt their markets and evolve their business models. We’re a new breed of partner that brings together the design-thinking of a digital agency with the rapid and iterative delivery of a modern IT services partner. With 21 offices worldwide, we’ve been continually recognized by both Gartner and Forrester as a leader in mobile IT services.