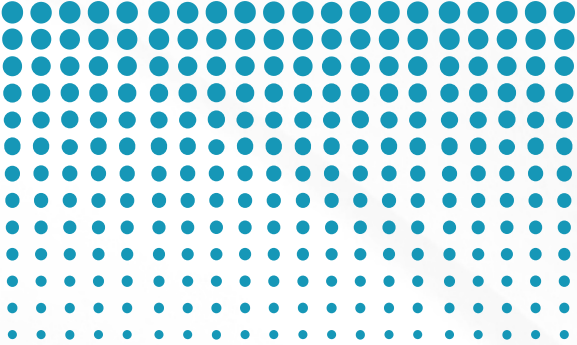




SPAR

SPAR 2025 SHOPPER INSIGHTS SURVEY



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Study Overview

- **Business & Research Needs**
- **Intended Use**
- **Target & Distribution**
- **Methodology**





Business Needs

The team is looking to explore consumers' awareness and attitudes towards shopping in stores vs. online, AI usage and tariffs in retail.



Research Needs

The team is hoping to use findings from the research for a white paper and at conferences.



Intended Use

The results from this study will provide insights into how consumers shop, what, where and when consumers think of AI in retail as well as the potential impact of tariffs on their shopping behaviors and help to develop a better shopping experience and communications.

Target & Distribution

Sample consists of:

- **1012N** US shoppers, ages 18-65
- 50/50 Males and Females
- Primary or shared grocery shopping responsibility
- US Census representation of region, education, marital status, and ethnicity



Methodology

Consumers answered a variety of questions around important factors and barriers for in-store and online shopping, what would encourage them to shop in-store and their favorite retailers to shop at. Additionally, they were asked how they use their phones when shopping in-store, which retailer's apps they use when shopping, the benefits to using technology and what they would want to be offered. Lastly, consumers were asked how recent tariffs and use of AI could impact their in-store shopping.

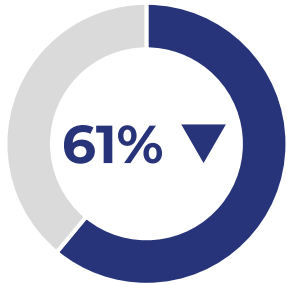




Key Findings

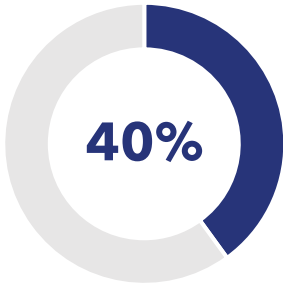


Shoppers are looking for **convenience and affordability** when shopping online or in-store. **Tech** can improve their experiences **via coupons and streamlining the checkout process**



Expect to increase in-store shopping in the next 6 months; key motivators for in-person shopping include:

- Convenience
- Cost
- New product selections ▼
- Ability to try / demo products ▼



Use their mobile device every time or most of the time when shopping in-store. Top tech used to encourage shopping online align with benefits of retailer apps:

- Coupons / rewards
- Self check-out / convenience checkout
- Best prices



Groceries ▼, home improvement, discount stores, apparel and convenience are the top preferred in-store destinations, motivated by convenience, and cost.



Most important when in-store

- Product availability (74%) ▼
- Efficiency to check out (52%) ▼
- Promotions (52%)*

...when online*

- Cost of order (62%)
- Availability of items on list (55%)
- Ability to find sale/promo items (51%)



Top frustrations when in-store

- Too crowded (75%)▲
- Out of stock / availability (73%) ▲
- Not enough staff (51%) ▲

...when online*

- Delivery fees (61%)
- Delivery delays (41%)
- Minimum order req. (39%)



Technology requested from retailers align with the benefits they seek, specifically rewards/games, product locators, buy online pick up in-store options.



57% ▲ Rank **Walmart** as the top physical retailer & 50% ▼ say the app improves their experience

47%

Are concerned about tariffs affecting their personal finances, most concerned about impact on the following categories:



Groceries



HH goods



Gasoline



Personal care

63%

Are likely to switch brands due to tariffs (T2B) and ~45-55% say they will look for sales / coupons or buy less overall.

▲ / ▼ - Higher / Lower than 2024 *not asked in 2024

38%



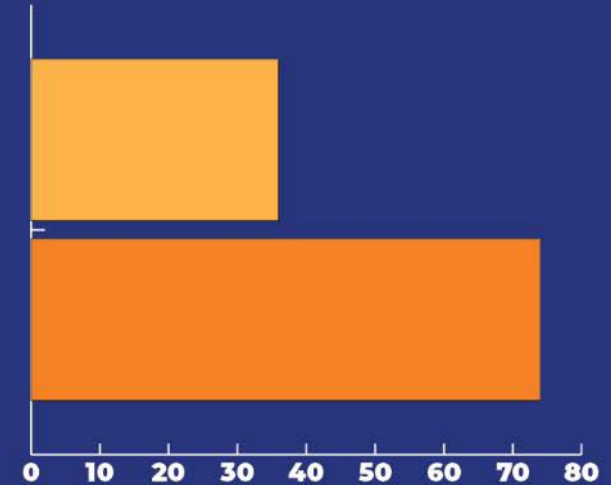
Say they feel positive about interacting with AI-driven customer service in-store (down from 53% in 2024), most concerned about data collection (62%) T2B: combines the top two responses



Product Availability

74%

of shoppers say **Product Availability** is the most important factor when shopping in stores.

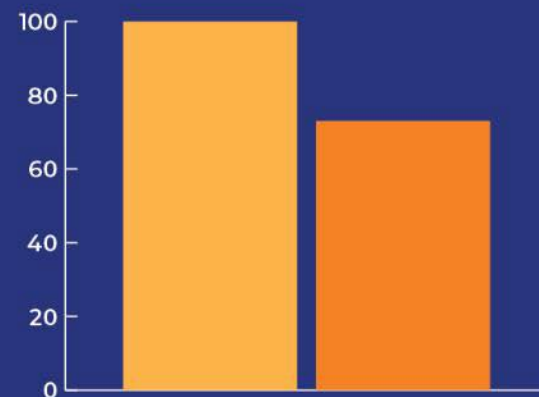




Out-Of-Stocks

73%

**of shoppers consider
out-of-stocks a
barrier to shopping
in stores.**



Noteworthy differences across shopper groups



Male shoppers are particularly looking for convenience when shopping in-store and see site delivery days as a bigger frustration when shopping online.

They are more likely to do price checks on their phone when in-store and scan QR codes, finding Costco and Home Depot apps more helpful.

They express higher positivity towards AI, with slightly fewer concerns than their counterparts.



Female shoppers are more likely to be frustrated with minimum order requirements when shopping online, as they are more likely to place importance on applying coupons and are more encouraged by loyalty coupons.

Personalized coupons and promotions are most likely to delight **females**, especially given their higher concerns regarding tariffs across most categories.

AGE DIFFERENCES

- Overall, **younger shoppers** are more likely to regularly use their mobile devices in-store and are looking for technology to support their experience, especially via smartphone payments, aisle mapping (especially for **18-24**), retailer specific apps and QR codes to learn more about products.
- Those **ages 18-39** plan to shop more in-store in the next 6 months, looking to make their shopping trips quicker. Also benefits like meal planning and recipes are also more interesting for these younger shoppers. They are most likely to share data with retailers and have positive perceptions towards AI.
- Not surprisingly, **older shoppers (aged 55+)** are more concerned about AI usage, less likely to use their mobile phones when shopping and are less concerned with tariffs impacting their finances, expecting to make fewer changes to their shopping habits.



Summary of Results

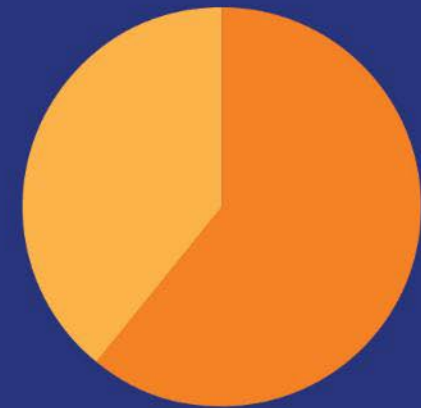
- Shopping Behaviors
- Technology & Shopping





More In-store Shopping

61% of respondents expect to **shop more in stores over the next 6 months.**



6 in 10 shoppers still expect to shop more in-store in the next 6 months—slightly down from 7 in 10 last year

Younger shoppers (ages 18-39) say they are more likely to shop in physical stores than their older counterparts.

Expect to Increase In-Store Shopping in Next 6 Months



▲ / ▼ - Higher / Lower than 2024

Question: *Will you shop more in physical stores in the next 6 months?* Base: 1012N shoppers

Grocery stores remain the top in-store destination (though less than in 2024), followed by home improvement, discount and apparel stores

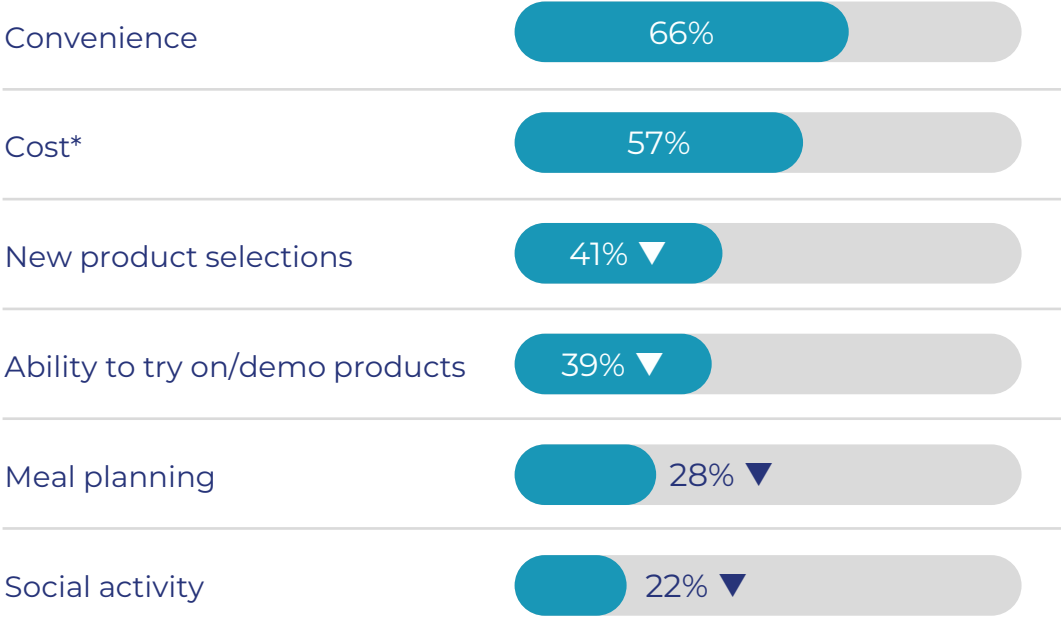
- Specialty purchases are significantly more in-store this year compared to last.
- Convenience and cost motivates shoppers to shop in-store, while new product selection and ability to demo are less motivating than last year.

Preferred In-Store Shopping Destinations

Groceries	79%▼
Home Improvement	44%
Discount Stores	44%
Apparel	44%
Convenience	42%
Pharmacies	39%
Department Stores	38%▼
Home Furnishing	30%
Pet Stores	25%
Specialty	19%▲
Other	0%
None of the above	2%

- Older shoppers (**ages 40-65**) are more likely to shop at groceries, home improvement and pharmacies in-store.

Shopping Motivators In-Store



- Those **ages 18-39** have more motivators to shop in-store vs older shoppers.

*Cost not asked in 2024

▲ / ▼ - Higher / Lower than 2024

▲ / ▼ Only shown for changes of ±3% or more

Questions: Which types of retailers are you more likely to shop in-store? // What motivates you to shop in stores vs. online? Base: 1012N shoppers



80%

of shoppers prefer to
purchase groceries
specifically **in-store.**



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Product availability is top of mind when considering to shop in-store, being both the most important factor and a top barrier

- More shoppers overall mention barriers to shopping in-store than last year.

Importance When Shopping In-Store (Top 3 Ranked)

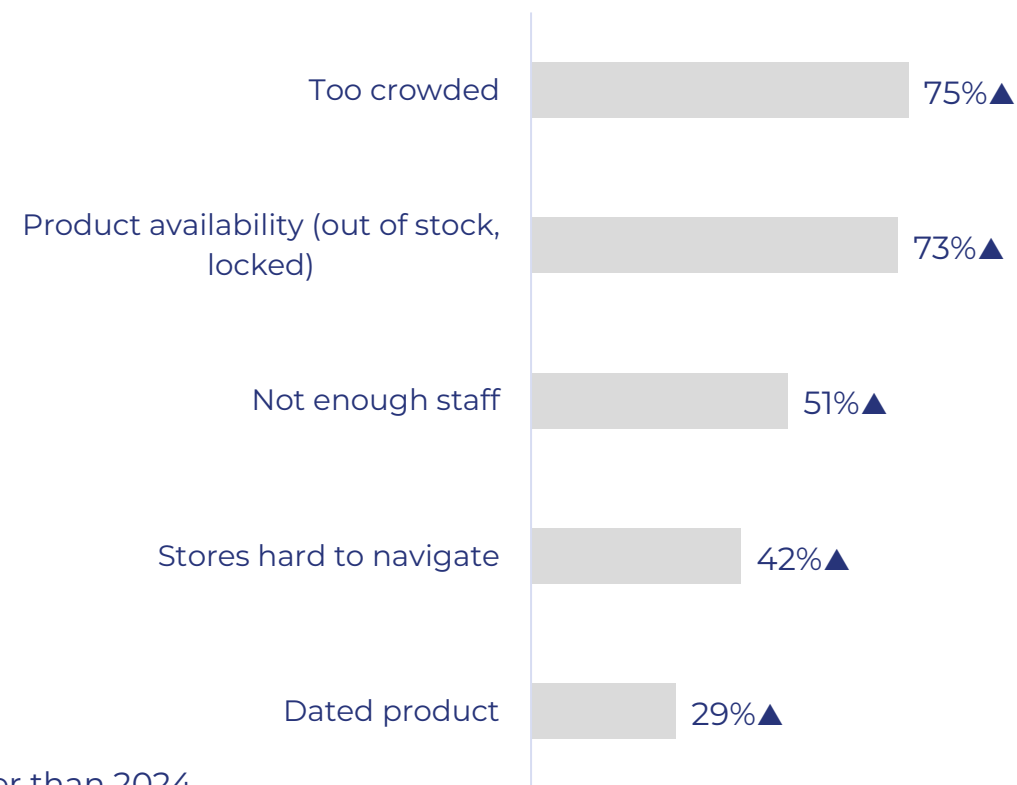


*Promotions not asked in 2024

▲ / ▼ - Higher / Lower than 2024

▲ / ▼ Only shown for changes of ±3% or more

Barriers to Shopping In-Store (Top 3 Ranked)



Questions: Please rank your top 3 most important factors when shopping in-store. // Please rank your top 3 most frustrating aspects of shopping in-store. Base: 1012N shoppers

Walmart does the best job making shopping in-store easier and exciting, followed by Target and Aldi

- Half of shoppers also mention that downloadable coupons and self checkout encourage them to shop in-store.
- While shoppers rate nearly all retailers higher than they did in 2024, many technologies wouldn't encourage them to shop in-store.

Top Physical Retailers (Ranked Top 5)	Total
 Walmart	57%▲
 TARGET	39%▲
 (ALDI)	32%▲
 COSTCO WHOLESALE	27%▲
 DOLLAR TREE	25%▲
 THE HOME DEPOT	23%▲
 Kroger	23%▲
 DOLLAR GENERAL	21%▲
 CVS pharmacy	20%▲

- At lower levels, Albertsons/Safeway and Target is ranked higher among younger shoppers, while older favor Kroger.

Retail stores that are shopped at by more than 20% of respondents are shown here.
Full data tables can be found in the appendix.

▲ / ▼ - Higher / Lower than 2024
▲ / ▼ Only shown for changes of ±3% or more

Technologies to encourage shopping		
	Coupons downloadable to your phone or frequent shopper card/loyalty program	51%
	Self-checkout	50%
	Scan and Go shopping technology (use phone to scan and checkout)	29%▼
	Payment via smartphone	27%▼
	Wi-Fi	25%▼
	Store mapping / aisle guidance	22%▼
	Online circular	21%
	Retailer app availability	18%▼

- **Women** are more likely to be encouraged by downloadable coupons.

Features that are important to ~20% of respondents shown here.
Full data tables can be found in the appendix.

Questions: Thinking of all the retail stores you shop at, which ones do the best job of making their physical stores easier to shop and more exciting? // Which technologies would encourage you to shop in-store at a retailer? Base: 1012N shoppers

When shopping online, cost is a major factor; whether it's the order being inexpensive or dealing with delivery fees

- Delivery fees are a higher barrier to shoppers ages 40-54.

Importance When Shopping Online (Top 3 Ranked)



Barriers to Shopping In-Store (Top 3 Ranked)

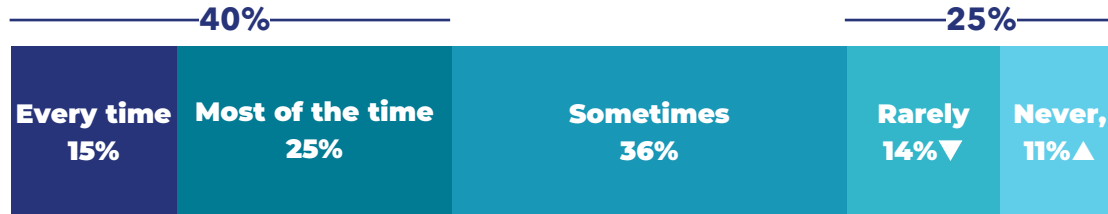


Questions: Please rank your top 3 most important factors when shopping online. // Please rank your top 3 most frustrating aspects of shopping online. Base: 1012N shoppers

Shoppers often use their phones while shopping, comparing prices or looking up discounts / promos

- Most shoppers will share data with retailers, though around 1 in 4 only share specific data for specific reasons, more than last year

Mobile Device Usage While Shopping In-Store



- Shoppers **ages 18-54** are more frequent mobile users when shopping in-store (~25% of **55-65** y/o say they never use it).

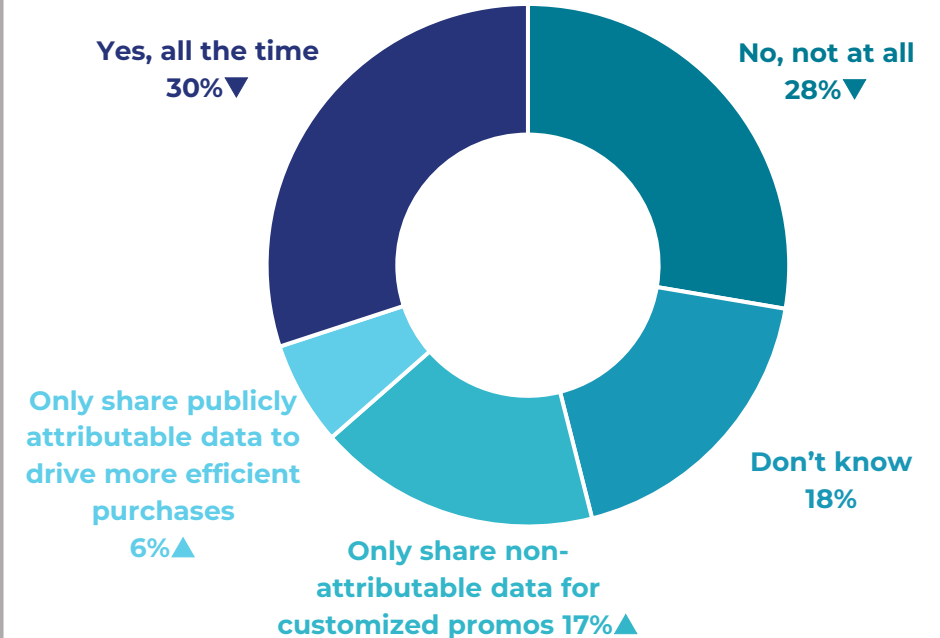
How Shoppers Use their Phones In-Store

Price check and comparisons	44%	Check off items on a digital grocery list	30%
Look up discounts/promos	41%	Research products and/or lookup product information	28%
Access or download digital coupons	34%	Scan a QR code	22%
Retailer's app	30%▼	Store mapping / aisle guidance	22%
Wi-Fi	30%	Access a specific retailer mobile app	17%▼

- Shoppers **ages 55-65** are less likely to use their phones in-store.

Phone functionalities that are used by ~20% of respondents are shown here.
Full data tables can be found in the appendix.

Data Sharing for Personalized Shopping



- ~35-45% of shoppers **ages 18-39** say they share all the time (vs ~25% of older shoppers).

▲ / ▼ - Higher / Lower than 2024
▲ / ▼ Only shown for changes of ±3% or more

Questions: How often do you use a mobile device when shopping in stores? // Which of the following have you used/done while in-store on your phone? // Do you share data with your preferred retailers to enable a more personalized and efficient shopping experience? Base: 1012N shoppers

Similar to in-store experiences, Walmart has the most helpful app while they are shopping, giving them rewards, good prices, and coupons

- Fewer shoppers feel that Walmart’s app improves their shopping experience compared to last year, with fewer finding the best prices and convenient checkout to benefit their shopping experience.

Retail Apps that Improve Shopping Experience	Total
 Walmart	50%▼
 TARGET	29%
 Kroger	16%
 COSTCO WHOLESALE	13%
 CVS pharmacy	13%
 THE HOME DEPOT	13%
 sam's club	12%▼
 ALDI (ALDI)	10%▲
 Walgreens	10%▼

- Walmart and Target are especially helpful for shoppers **ages 18-54**.

Retail apps that are helpful to more than 10% of respondents are shown here.
Full data tables can be found in the appendix.

▲ / ▼ - Higher / Lower than 2024
▲ / ▼ Only shown for changes of ±3% or more

Questions: Which retail apps do you find most helpful while shopping? // What are the biggest benefits of using technology during your shopping experience? Base: 1012N shoppers

Top benefits of using retail apps

	Loyalty rewards	43%
	Getting the best prices	43%▼
	Coupons tailored to me	34%
	Convenient checkout	30%▼
	Find out if they have in stock online or in another store	28%
	Product location	28%
	Research products	28%
	Quicker shopping trips	23%▼
	Seeing the most appropriate promos/sales	22%

- 18-24 y/o** see less benefits for tailored coupons, rather looking for recipes/meal planning benefits.

App functions that are beneficial to more than 20% of respondents shown here.
Full data tables can be found in the appendix.

In line with how technology encourages shopping in-store, shoppers find self checkout, apps, and coupon sites to be the most helpful

- Shoppers are feeling that many shopping aids are less helpful from last year, like self checkout, mobile apps, and coupon websites.

Most Helpful Shopping Aids

- Aligned with their mobile usage, shoppers **ages 18-54** are more likely to find mobile apps and social media helpful compared to those **ages 55-65** who find return in store options helpful.

Self-checkout	54%▼
Mobile apps	36%▼
Coupon websites or apps	36%▼
Store websites	35%
Buy online, pick up in store option	32%
Return in store options	26%
Contactless checkout	20%▼
Brand websites	16%
Social media	14%▼
QR codes	10%▼
Kiosks	9%
Interactive displays	8%

Shopping aids that are helpful to more than ~10% of respondents are shown here.
Full data tables can be found in the appendix.

▲ / ▼ - Higher / Lower than 2024
▲ / ▼ Only shown for changes of ±3% or more

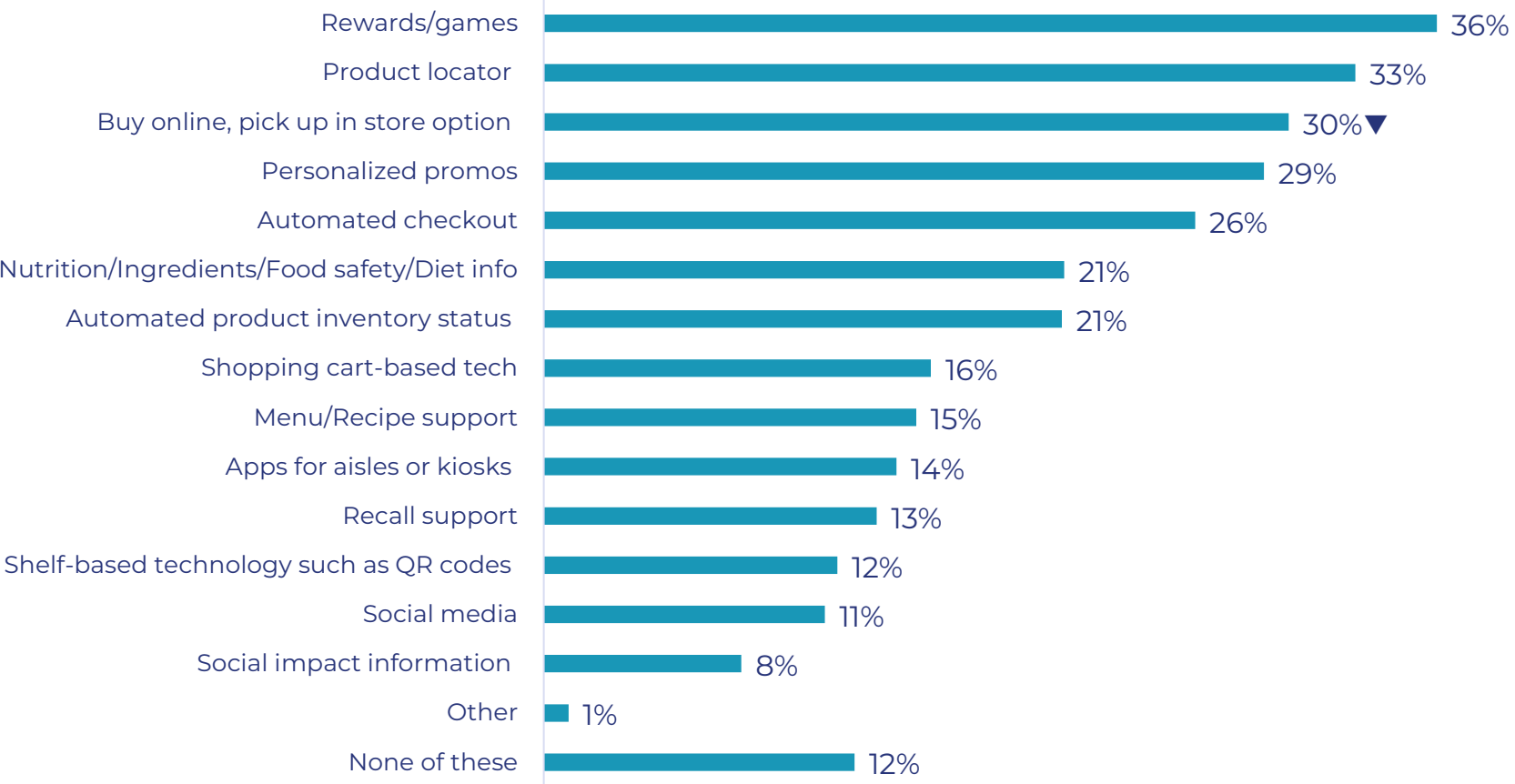
Question: Which of the following, if any, have become more important and helpful to you when shopping today? Base: 1012N shoppers

Retailers offering technology that has rewards/games, product locator services, and in-store pick up options would appeal to shoppers

- Fewer shoppers are looking for retail stores to offer in-store pick up compared to 2024

Tech Shoppers Want from Retailers

- Men** and those **ages 40-65** are more likely to desire product locators compared to their counterparts.
- Shoppers **ages 18-54** are looking for menu/recipe support from their retailers.

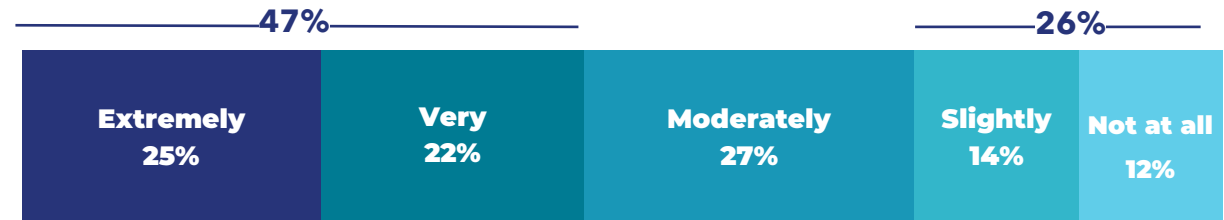


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Nealy half of shoppers are very concerned about tariffs, especially regarding grocery prices

- Around half of shoppers expect that their expenses will increase less than \$1,000 due to the tariffs

Tariff Concerns



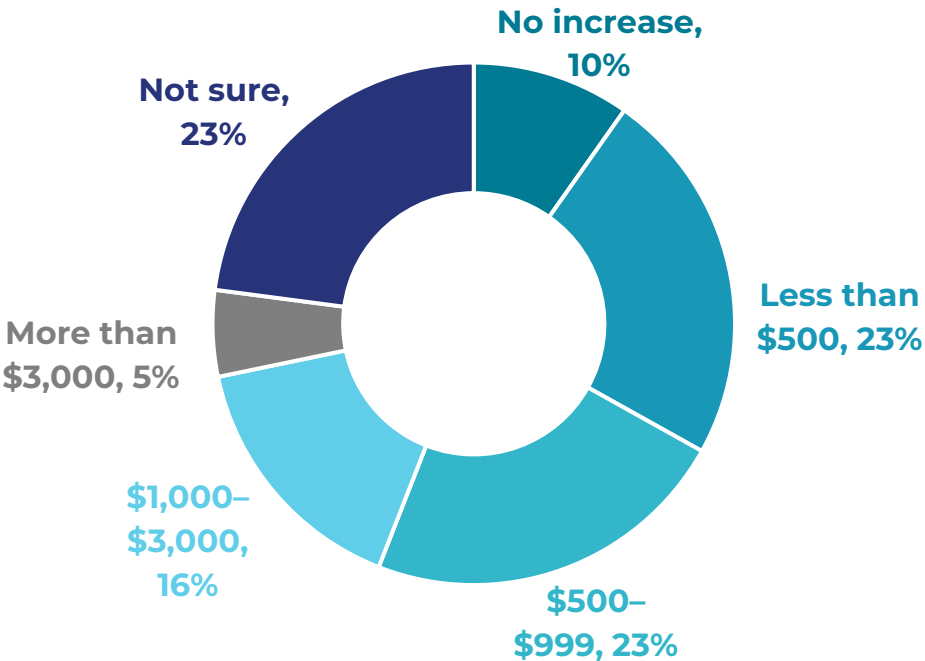
- Shoppers **ages 18-39** are more likely to be very concerned.

Categories Most Concerned About

Groceries	75%	Automobiles	38%
Household goods	55%	Home appliances	35%
Gasoline	49%	Other	2%
Personal care products	46%	None of these	9%

- **Women** are more concerned about most categories, shoppers **ages 18-24** are particularly concerned about gasoline.

Expected Tariff Expense Increases



- Those **ages 18-24** are most likely to expect an increase of \$500-\$999, while older shoppers are less sure.

Questions: How concerned are you about tariffs affecting your personal finances? // Which categories are you most worried about seeing price increases due to tariffs? // How much do you expect your household expenses to increase over the next year because of tariffs? Base: 1012N shoppers

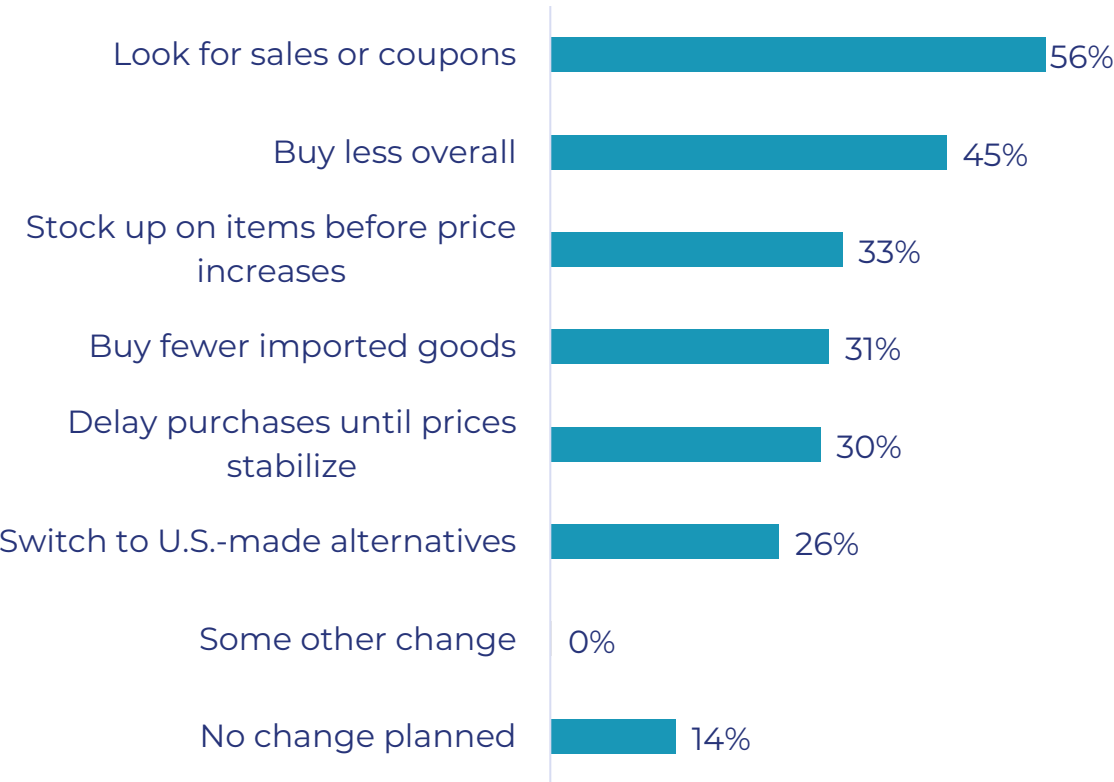


Many expect to look for coupons or sales more or buy less overall, **while nearly two-thirds expect to switch brands due to tariffs.**

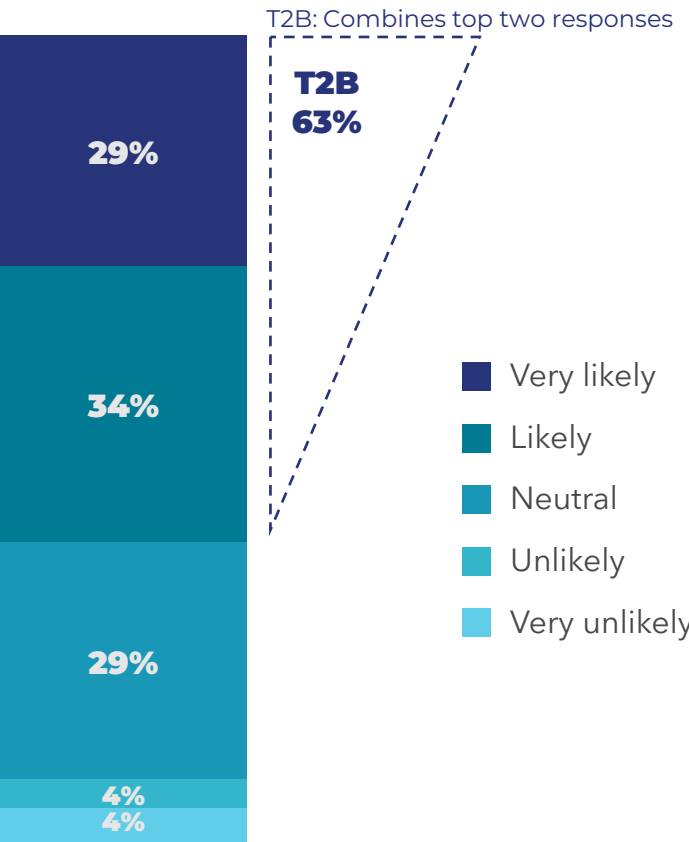
Many expect to look for coupons or sales more or buy less overall, while nearly two-thirds expect to switch brands due to tariffs

- **Women** are more likely to look for sales or buy less overall.

Shopping Habits Changed due to Tariffs



Likely to Switch Brands due to Tariffs

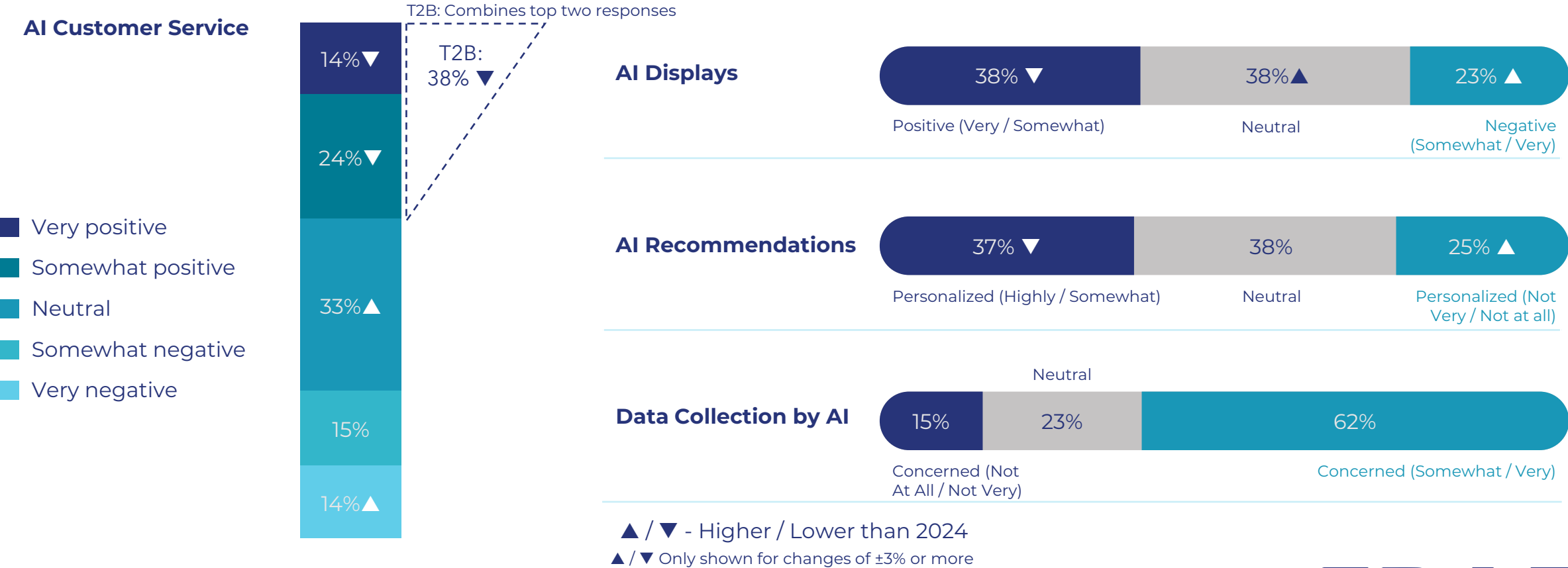


Questions: If you plan to change your shopping habits as a result of the tariffs, which of the following actions are you most likely to take? // How likely are you to switch brands or products if your preferred items become more expensive due to tariffs? Base: 1012N shoppers

Shoppers are generally split about AI’s usage in-store, whether for customer service, displays, or recommendations

- Most shoppers are concerned about their data being collected by AI (highest among those **ages 55-65**).
- There is more negative sentiment towards AI in-store, especially around customer service, displays, and recommendations than last year, driven by older shoppers (**ages 40-65**).

Feelings Toward AI Usage In-Store



Questions: Retailers are increasingly using AI to support customer service through the use of chatbots and digital assistants. How do you feel about interacting with AI-driven customer service in stores? // Retailers are using AI to generate personalized content on digital displays in stores. How do you feel about that? // How personalized do you feel the AI-driven recommendations in retail stores are? // How concerned are you about privacy when AI is used to collect data about your shopping habits in-store? Base: 1012N shoppers

71% of shoppers are uncomfortable or unsure with the idea of using robot cameras to roam aisles, even if they do not assist customers

- **Men** and shoppers **ages 18-54** are more comfortable with cameras than their counterparts.

In-Store Robot Cameras



Question: Would you feel comfortable shopping at a store where robots with cameras roam the aisles but do not assist customers?
Base: 1012N shoppers



Roaming Robots

Less than 30% of shoppers are comfortable with roaming robots in stores.

Females are more uncomfortable with roaming robot cameras in stores than Males.

Thank You

For questions or additional
information on these survey results,
please visit:

<https://www.sparinc.com/contact/>

