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Current State of Omni-Channel Retail

Consumer Research Report 2025 ANZ

A Resonate commissioned Market Study | 2025

About Resonate CX

Resonate CX is an Australian built and owned Voice of the Customer (VoC) platform disrupting the Customer Experience Management (CXM) space.
With rapidly growing success in retail, we are turning raw customer insights into decisive business actions.
Our native AI-driven experience analytics deliver real-time business results. Driving conversions, helping grow basket sizes, and power charging customer lifetime value.
We are re-defining CX the be the most powerful growth engine for a company.

Research

A statistically significant market study of 900 respondents was conducted in January 2025, with a 95% confidence level and a margin of error of less than ±4%.

The biggest names in retail swear by Resonate CX

Highly recommend Resonate for their CX knowledge and expertise.

Beck Davis
Customer Experience Lead | Bluescope

Resonate allows us to learn, adapt and best serve our customer in a changing retail environment.

Madeline Harris
National Customer & Communications Manager | Rebel Sports

A key enabler for my business. Enabled to bring the cultural shift in my organization to be more customer focused.

Samuel Mathew Krishnamoorthy
Head B2B - Country Head UK | brillen.de

Valuable tool to harness the voice of customer.

Dave Hallewell
Retail Customer Experience Specialist | Super Cheap Auto

Easy to navigate. Great for deep diving for strategy planning.

Rob Mason
Store Manager | BCF

Resonate allows us to see the drivers that customers are happy and unhappy with.

Jennifer Karcz
Store Manager | Super Cheap Auto

Resonate is giving me feedback on the service my customers experience, and what they are unhappy with.

Jo-Anne Nel
Retail Manager | Rebel Sports

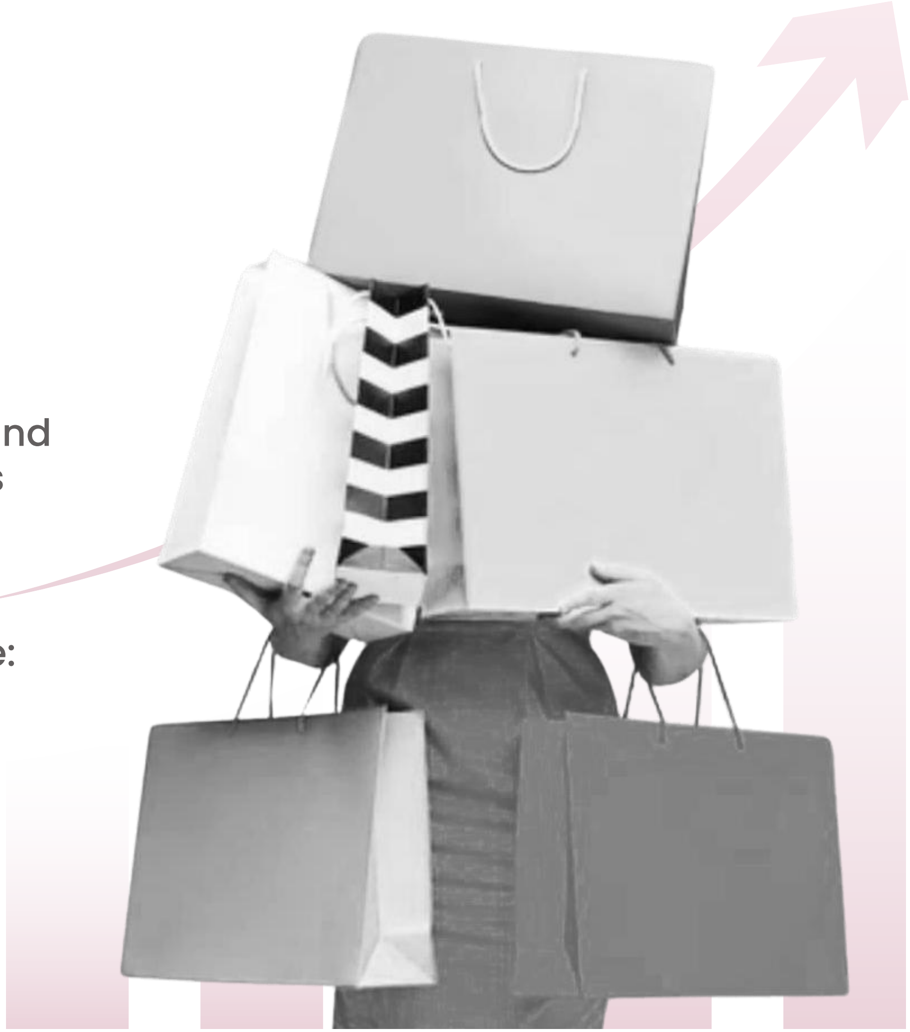
Resonate has been extremely helpful and insightful in my stores.

Matt Steinbergs
Area Manager | Super Retail Group


THE AUSTRALIAN
Retailers face shrinking margins and rising costs
Australia's retail sector is grappling with worsening trading conditions driven by rising rents, wage pressures, weak consumer confidence, and high living costs. These financial pressures are limiting retailers' ability to invest in better customer experience and staff support.
news.com.au
be on it
Self-service tech boosting speed but harming experience
retailbiz
Aussie shoppers not happy with online returns
A national survey late last year found that 30% of online shoppers are dissatisfied with returns or refunds—especially when items are lost or damaged. It often takes more than two weeks to resolve, frustrating
CFOtech
AUSTRALIA
Australian firms risk $71 billion due to poor service
According to the research, 54% of Australian consumers are inclined to reduce spending after a negative customer experience, and one in ten brand interactions fail to meet

AGENDA

Growth focused CX insights



1. Current Shopping Patterns
2. Channel conversion and unplanned purchases
3. Optimizing basket size: Factors influencing conversion
4. Return process and basket size: Importance and key factors
5. Online delivery : Preferences, factors, and trends
6. Understanding different mindsets
7. Driving greater revenue through dream experiences

PART 1

Current Shopping Patterns

- Trends in shopping patterns and preferences.
- Key factors shaping purchase decisions.
- Key in-store differences from online

CURRENT CHANNEL PREFERENCES

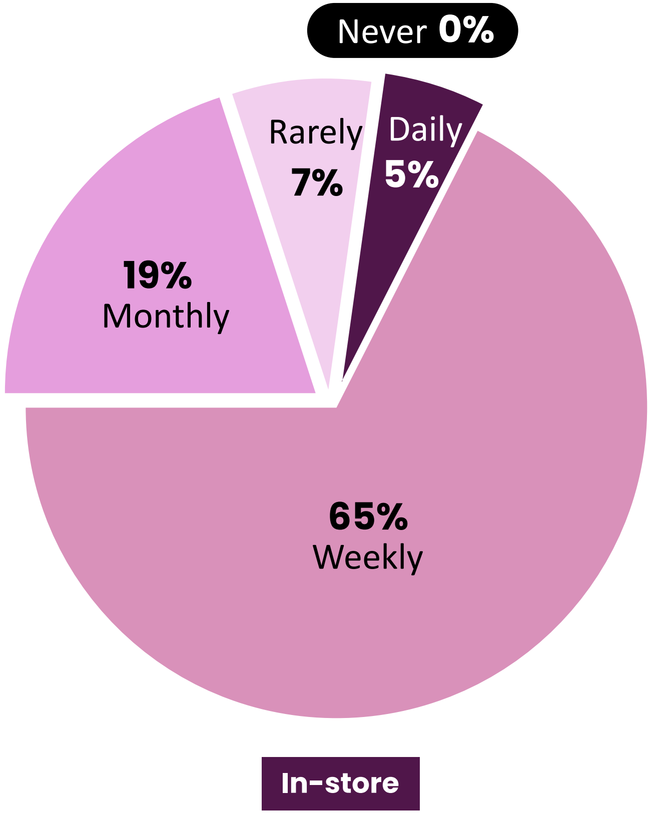
3 out of 5 prefer physical retail stores
when shopping for non-essential products.

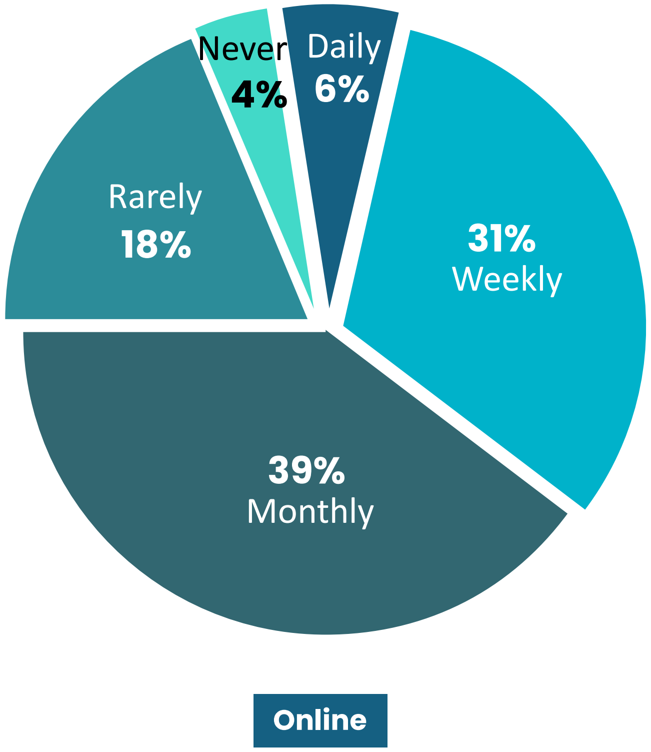
In-store

Online

HOW FREQUENTLY CONSUMERS SHOP

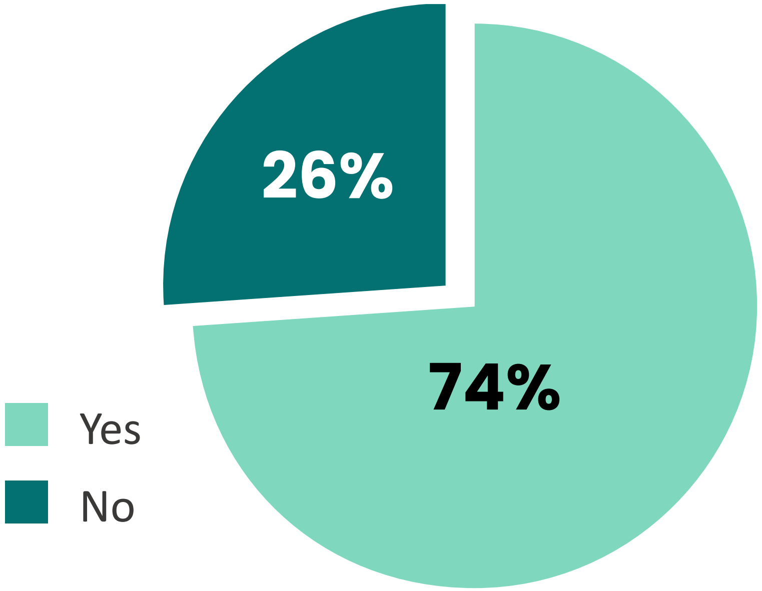
In-store shopping has a ***noticeably higher weekly frequency***, 30 points more than online shopping.





CHANGE OF PATTERNS

Almost ***3 out of 4 claim to have changed their shopping patterns*** in the last 12 months.

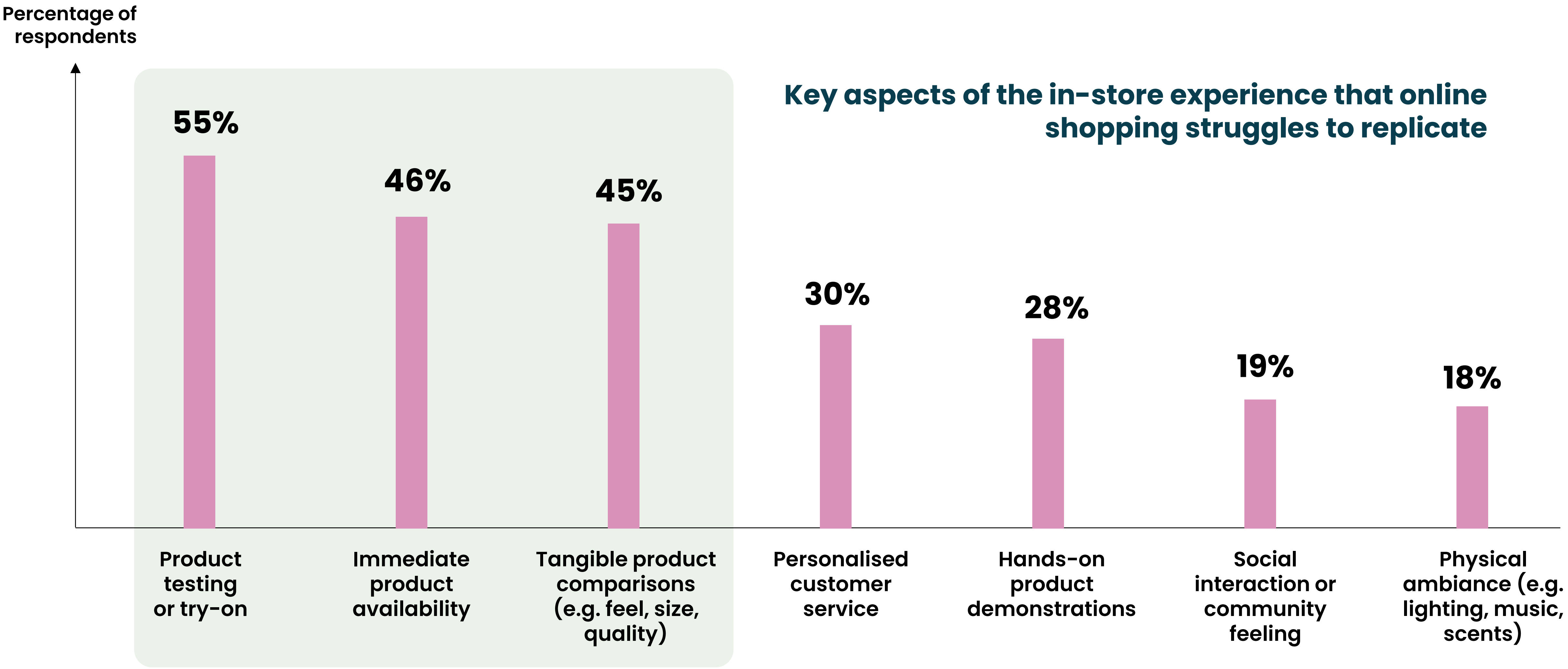


Influencing Factors

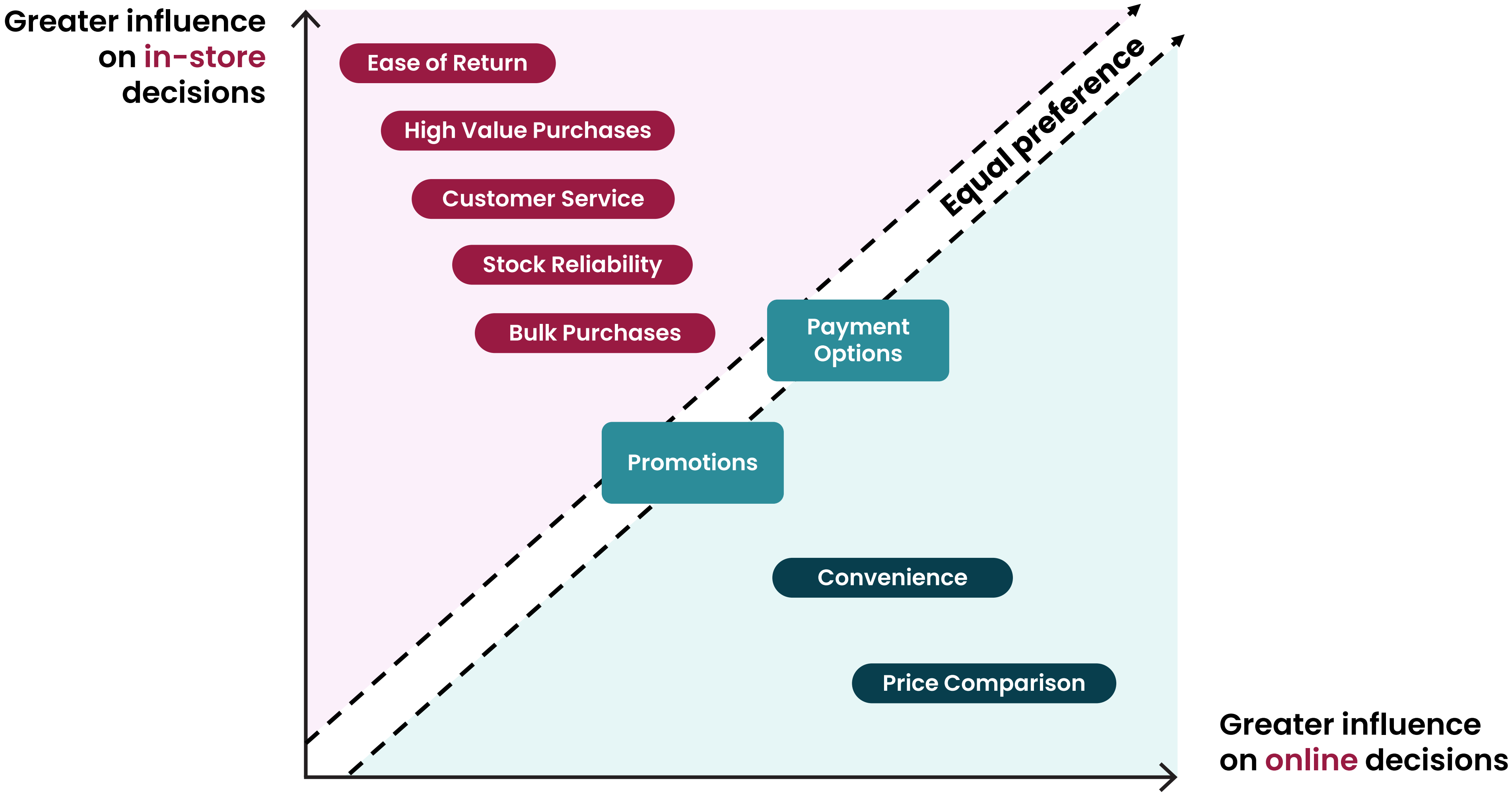
1. Reduction in non-essential purchases
2. Budget-conscious spending
3. Shift towards cheaper alternatives

85% of responses can be **grouped into one of these categories**, clearly confirming the trend toward **reduced consumption** or the focus on **spending less.**

WHAT MAKES IN-STORE SHOPPING UNIQUE



FACTORES INFLUENCING THE CHOICE OF SHOPPING CHANNELS



PART 2

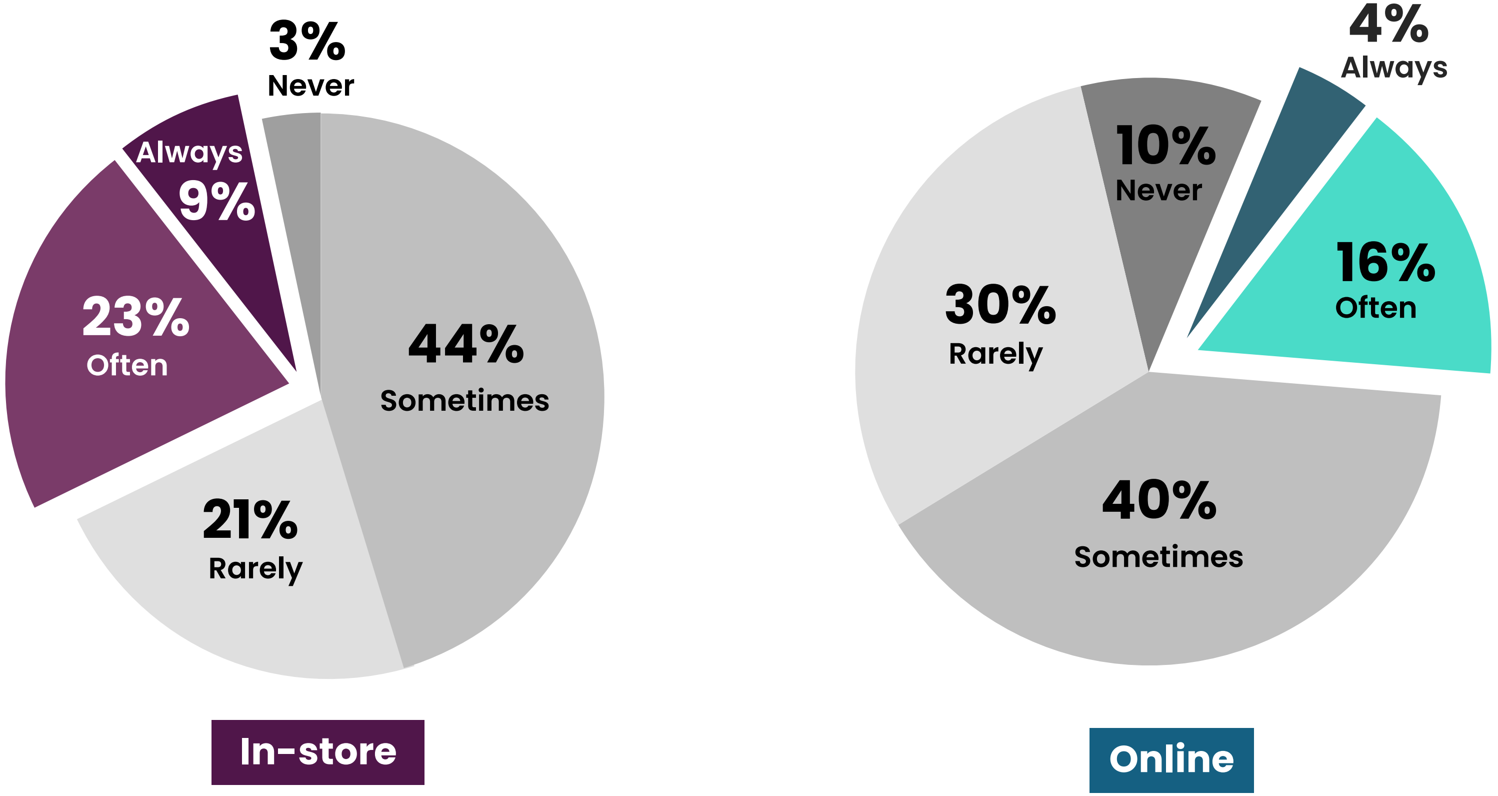
Channel conversion and unplanned purchases

- Understand the importance of *information-seeking* before purchases
- Identify the *key factors driving unplanned* purchases

CHANNEL DRIVING MOST UNPLANNED PURCHASES

The rate of unplanned purchases is over **10 percentage points higher** ***in-store than online.***

32% *Unplanned purchases*



20% *Unplanned purchases*

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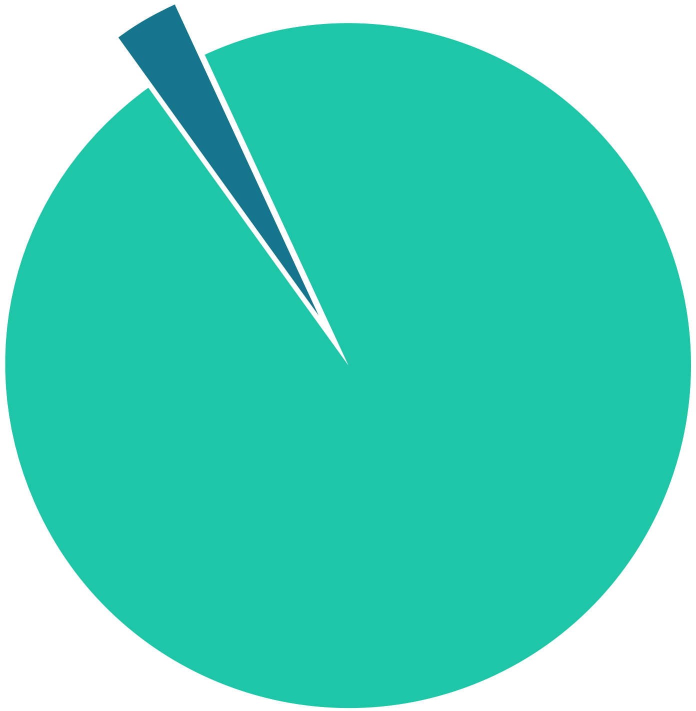
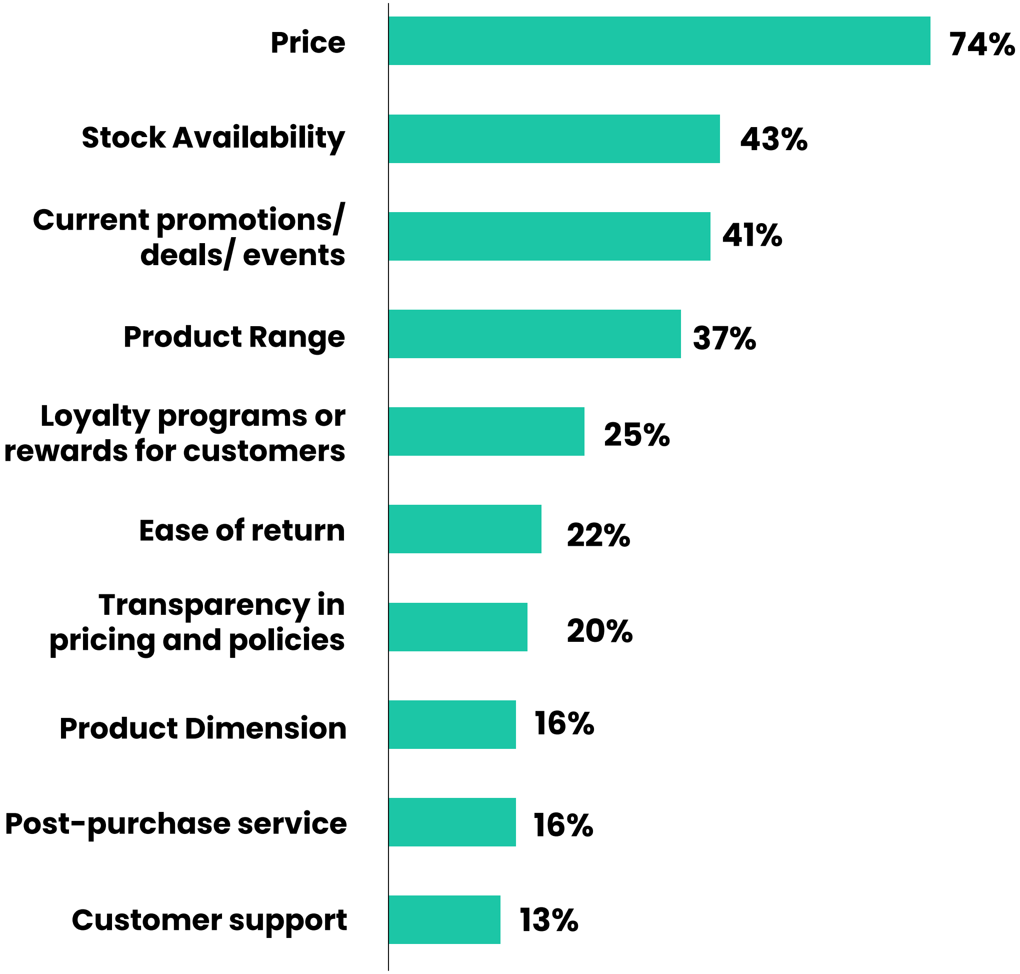
WHAT CONSUMERS RESEARCH BEFORE MAKING A PURCHASE?

Only **3%** **of consumers**
don't do research

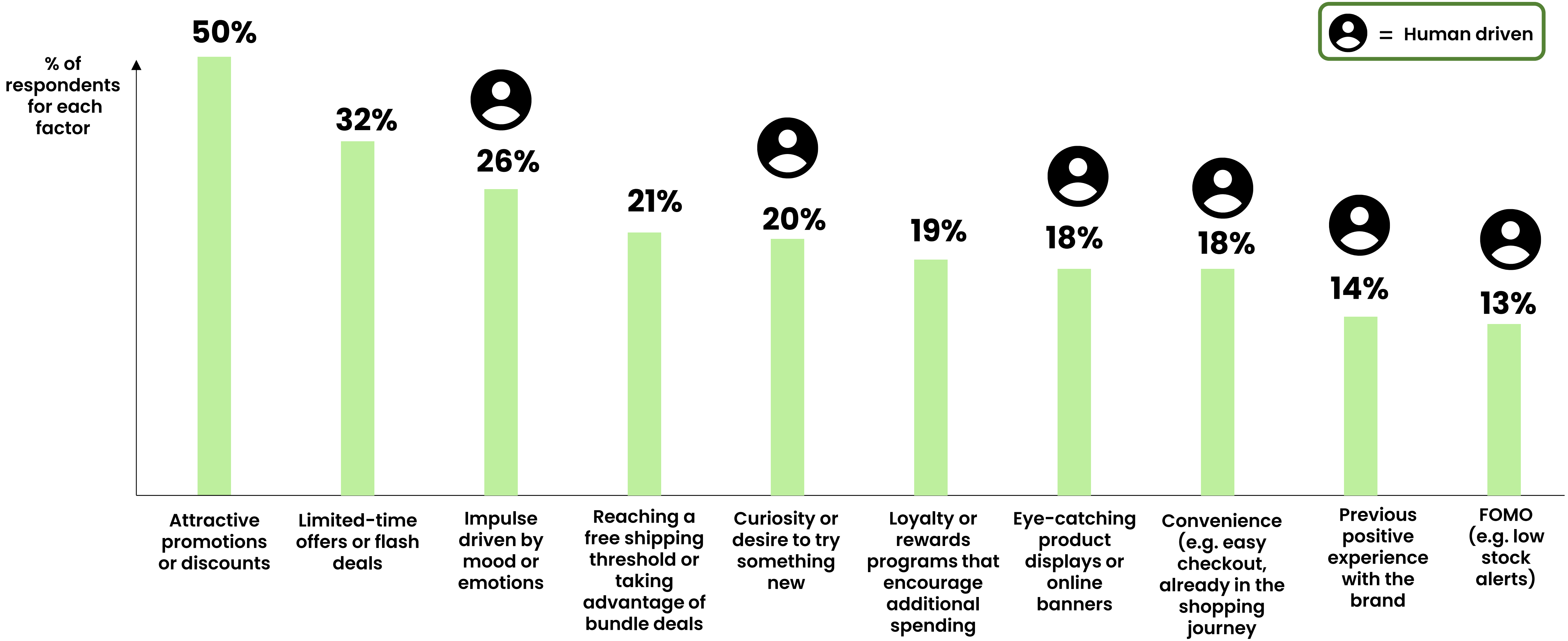


97%
do research
most of the time

Pre-Purchase Information Needs



INCREASING UNPLANNED PURCHASES

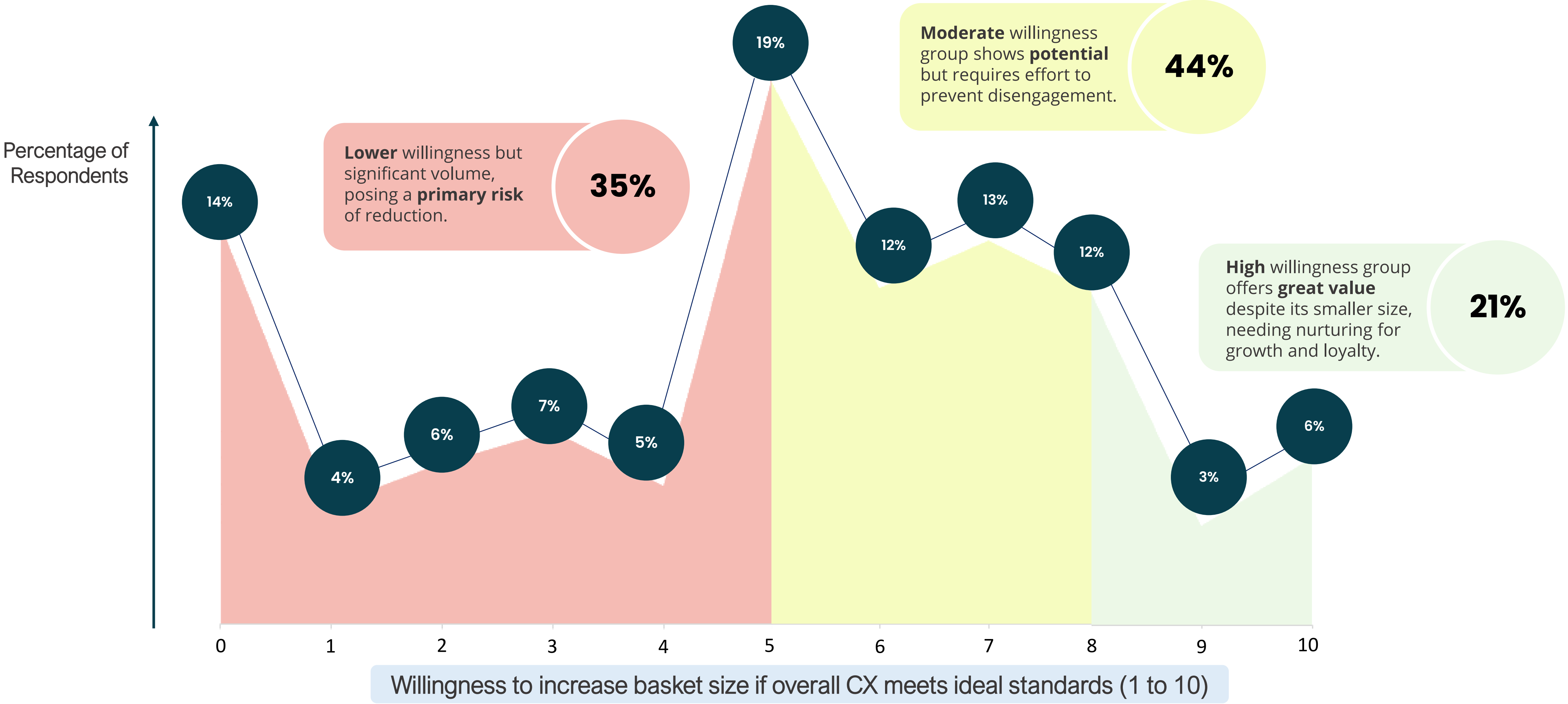


PART 3

Optimizing basket size: Factors influencing conversion

- *Identify* key factors contributing to cart abandonment in-store and online
- *Evaluate* the effectiveness of follow-up communications

IMPACT OF CX ON WILLINGNESS TO INCREASE BASKET SIZE



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WHAT CX FACTORS CONTRIBUTE TO IN-STORE CART ABANDONMENT?

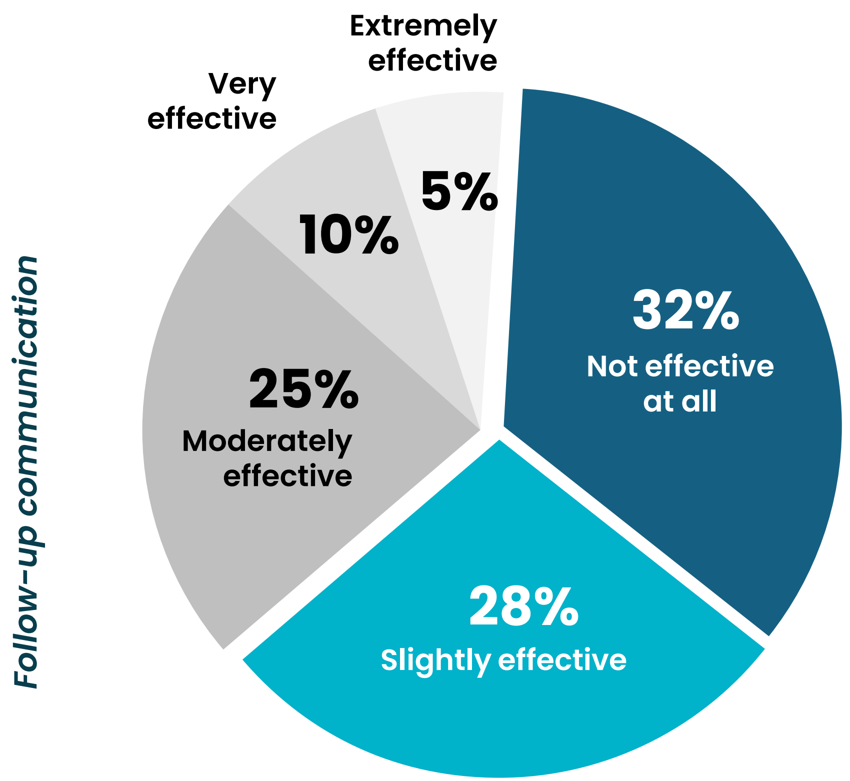
Reason for Loss of Conversion

57%	48%	47%	29%	25%	22%	20%	20%
Prices were too high	Couldn't find what I needed	Product was out of stock	Found a better deal elsewhere	Long queues	Poor staff assistance	Store was too crowded	Lack of product variety

WHAT CX FACTORS CONTRIBUTE TO ONLINE CART ABANDONMENT?

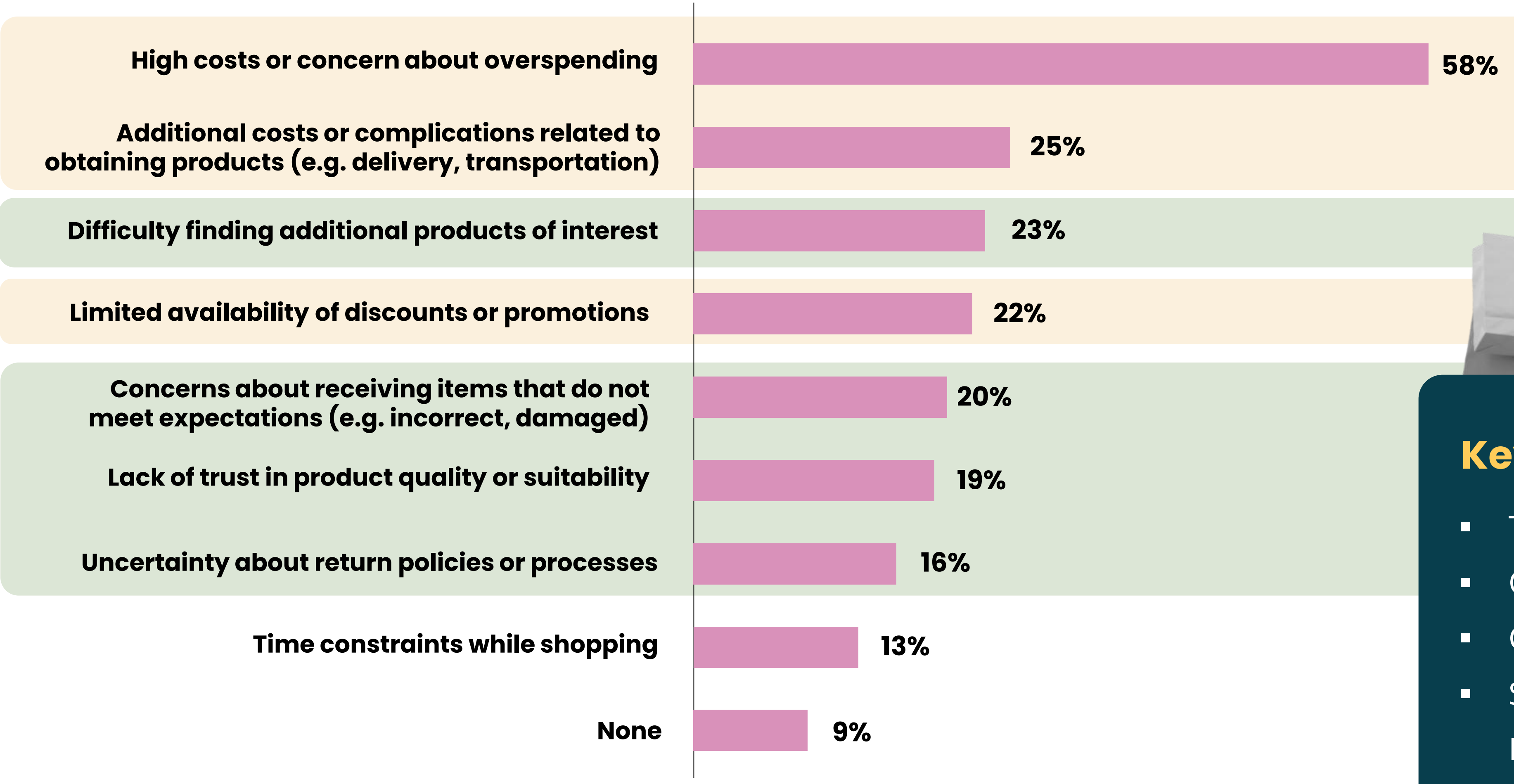
Main reasons for not completing an online purchase

- **54%** High delivery fees
- **26%** Found a better deal elsewhere
- **25%** Delivery time too long
- **24%** Item out of stock or limited availability
- **21%** Concerns about product quality
- **19%** Prefer to buy in-store



60% of customers ***find follow-up communication ineffective***, emphasizing the need for clearer, more timely engagement to reduce dissatisfaction.

WHY IS THE BASKET SHRINKING



Key Opportunities

- Transparent Policies
- Quality & Trust
- Clear Communication
- Seamless Shopping Experience

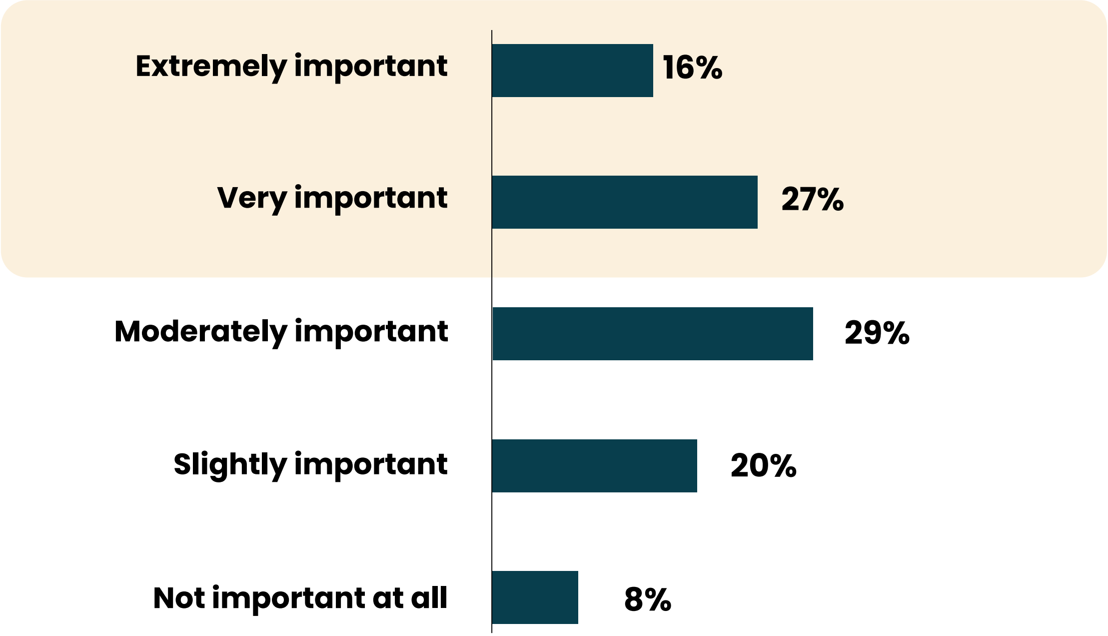
PART 4

Return process and basket size: Importance and key factors

- Understand the importance of the *return process* in increasing *basket size*
- Identify the most *important factors* in the *return process*
- Explore how customers imagine the *ideal return experience*
- Determine how willing customers are to *pay more for an enhanced return process*

HOW IMPORTANT ARE RETURNS, AND WHAT FACTORS ARE DECISIVE?

4 out of 10 consider **returns** as ***very or extremely important*** process when deciding to *add multiple items to their baskets*.



Most valued factors

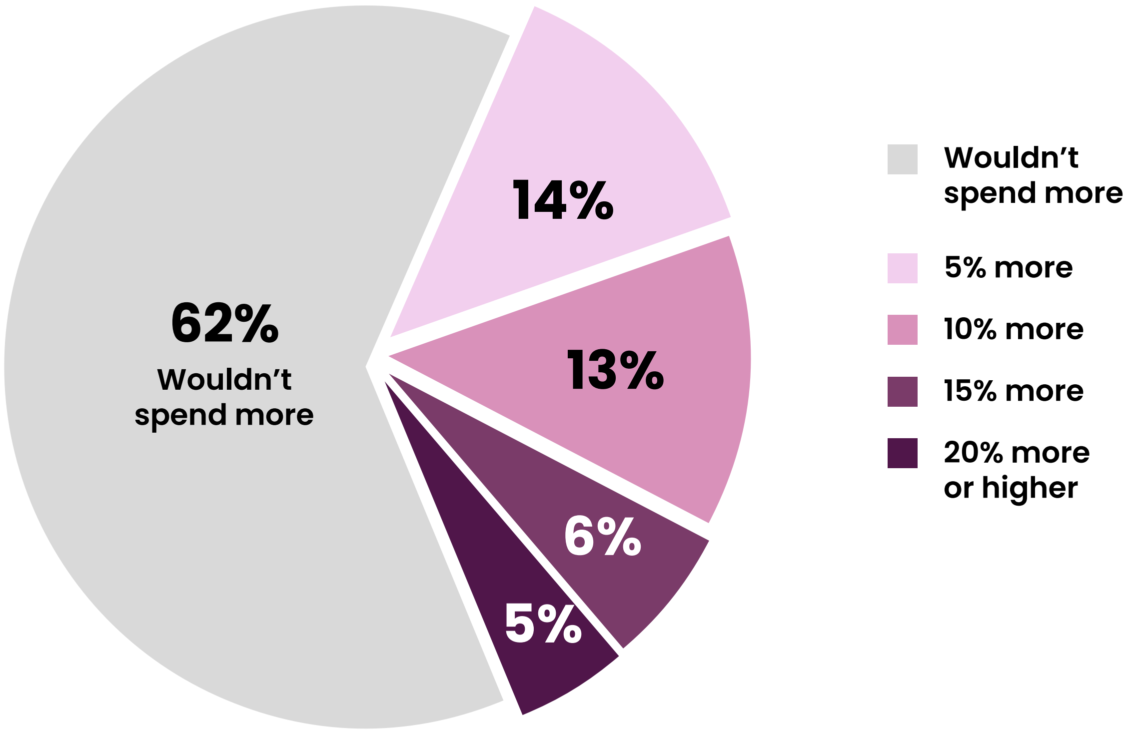
1. **Hassle-free returns** *(e.g., no need for original packaging)*
2. **Fast or instant refunds**
3. **No additional restocking or return fees**
4. **Prepaid return shipping labels**
5. **Clear and transparent return policies**

DEFINING THE IDEAL RETURN EXPERIENCE

Most valued factors

1. Ease and Convenience
2. Fast and Instant Refunds
3. No additional cost
4. Flexible Return Options

Nearly 40% would **pay a premium** for an **ideal return experience**, matching its importance in purchase decisions.



PART 5

Online Delivery: Preferences, factors, and trends

- *Identify* customer delivery preferences and strategies to meet their needs.
- *Determine* key factors influencing delivery choices and ways to prioritize them.
- *Assess* customer tolerance for delivery times before opting for in-store pickup.
- *Evaluate* the importance of click and collect and methods to enhance its adoption.

DELIVERY PREFERENCES

Delivery is by far the most
preferred choice among customers.

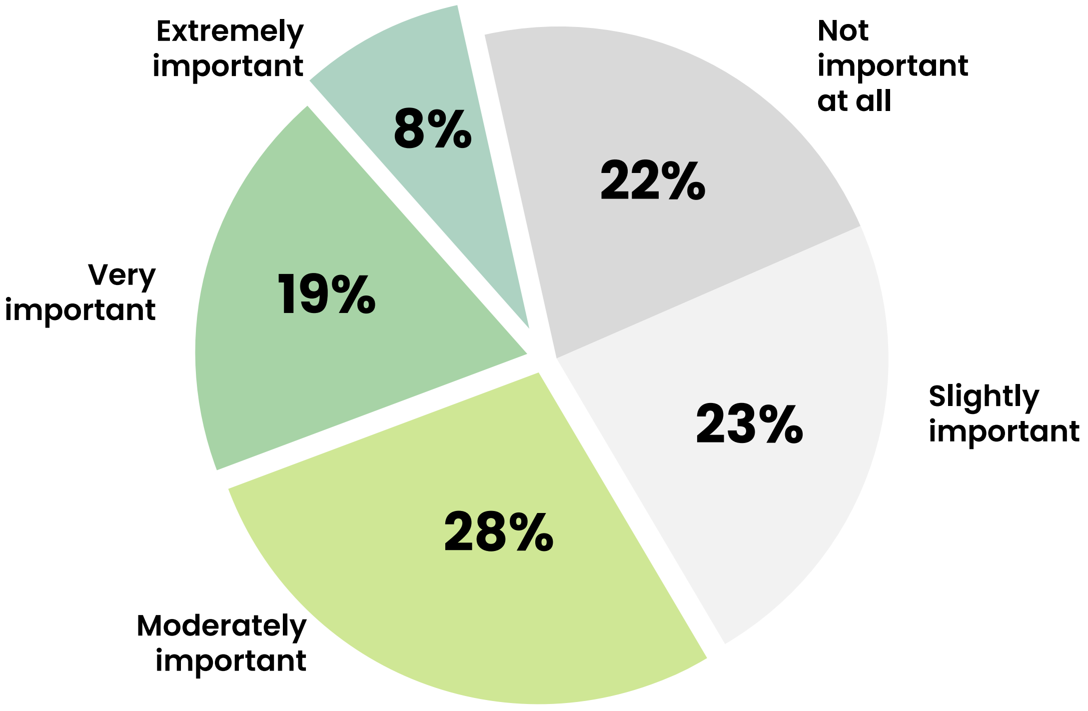
60%
Delivery

24%
Both Equally

16%
Click and Collect

CLICK & COLLECT IMPORTANCE

While **56%** of shoppers consider **Click & Collect** important, a significant 44% see it as less critical, highlighting *a polarized view on its role* in customer convenience.

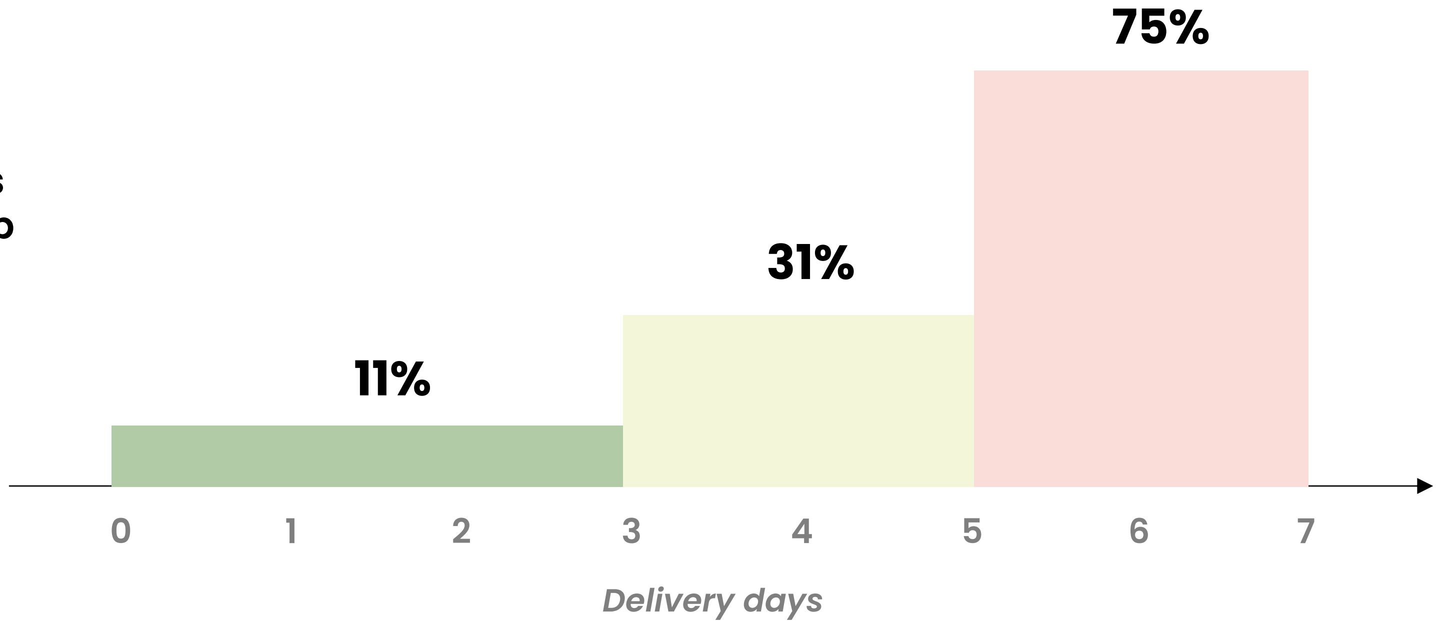


IMPATIENCE IN DELIVERY MAKES IN-STORE SHOPPING VALUABLE

3 out of 4 customers (75%) will **switch to in-store shopping** if delivery takes ***more than 5 days***.

9%

Always prefers in-store pick up regardless



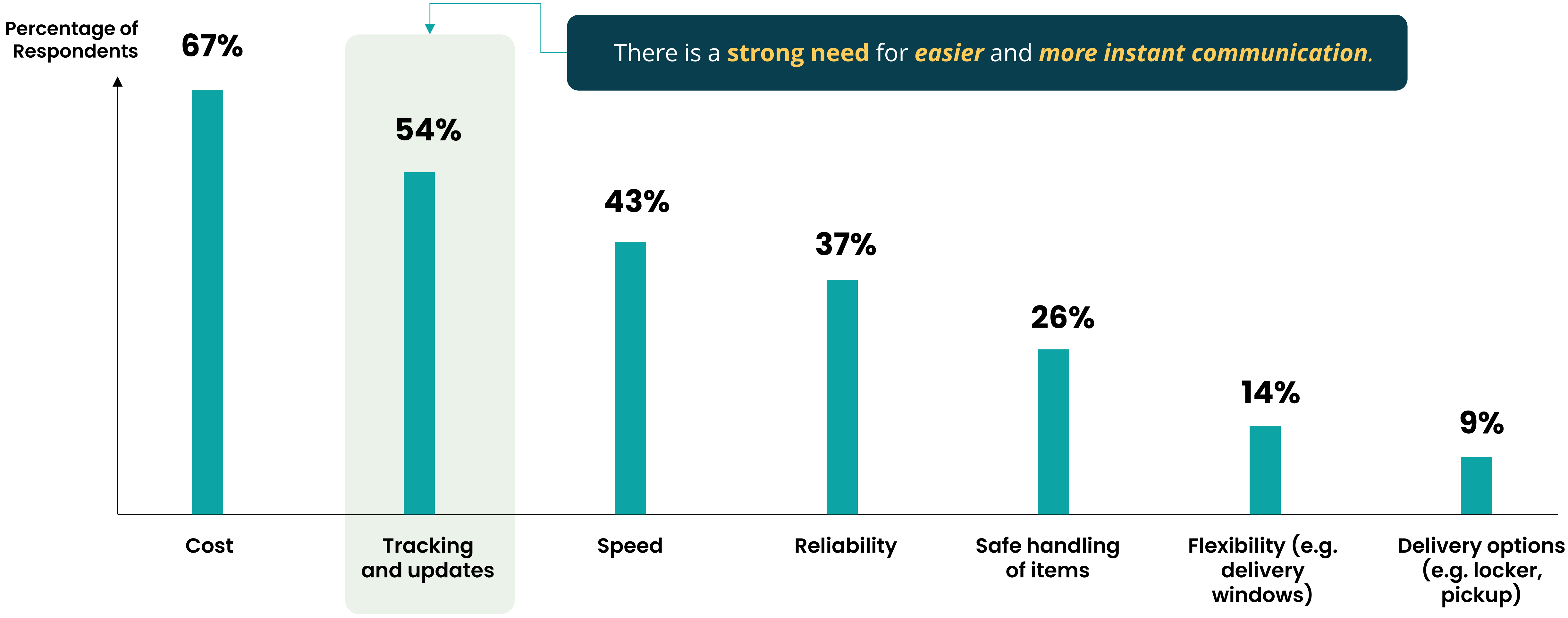
16%

Always prefers home delivery regardless

Will switch to in-store shopping if delivery days exceeds

Cumulative percentages for those flexible on delivery time. Fixed preferences (9% in-store, 16% home) are separate.

WHAT ATTRIBUTES OF DELIVERY EXPERIENCE ARE VALUED



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PART 6

Understanding different mindsets

- Explore how *consumer mindsets differ* and the impact this can have on *consumption.*

THE MINDSETS AND BASKET SIZE ELASTICITY

35%

PLANNER

Lower willingness to increase basket size but represents a significant portion of the market, bringing volume while posing a primary **risk** of reduced consumption.

44%

CONDITIONAL GROWER

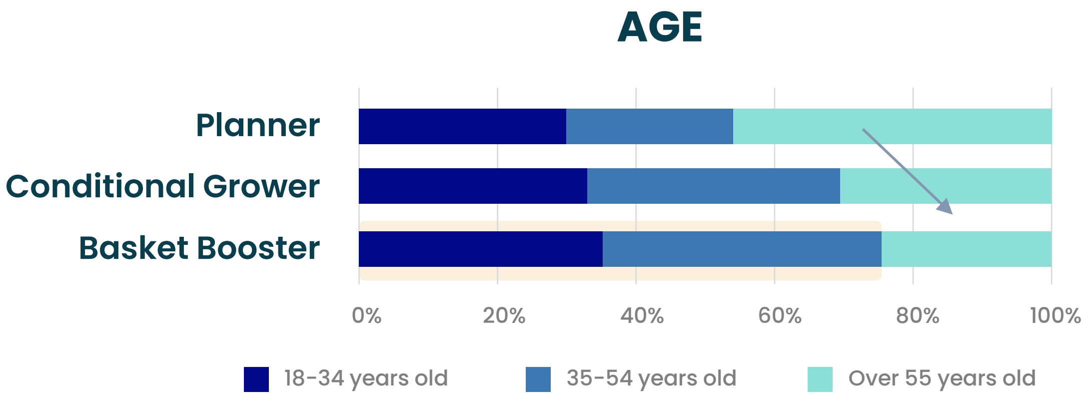
Moderate willingness to increase basket size when CX meets expectations, showing **potential** but requiring focused efforts to prevent disengagement and sustain growth.

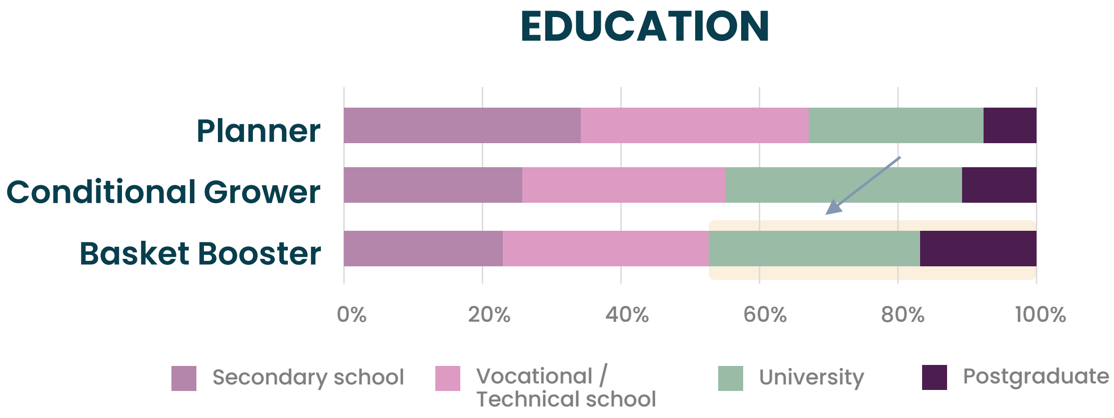
21%

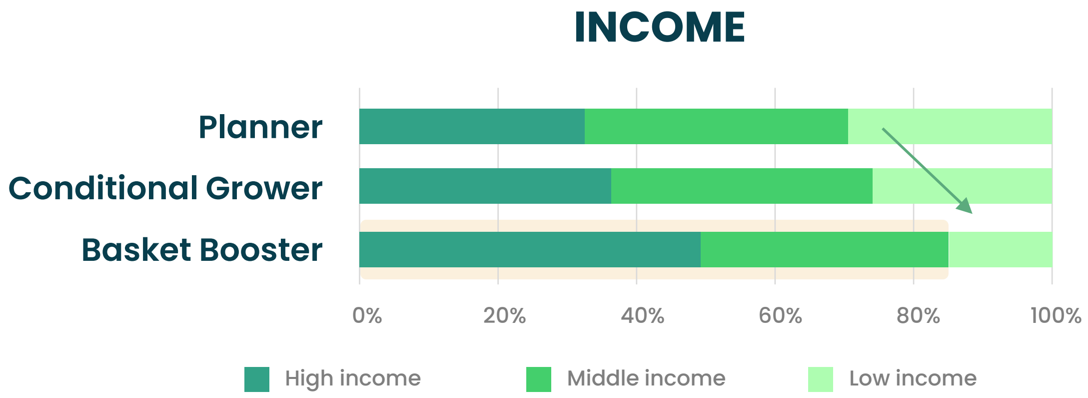
BASKET BOOSTER

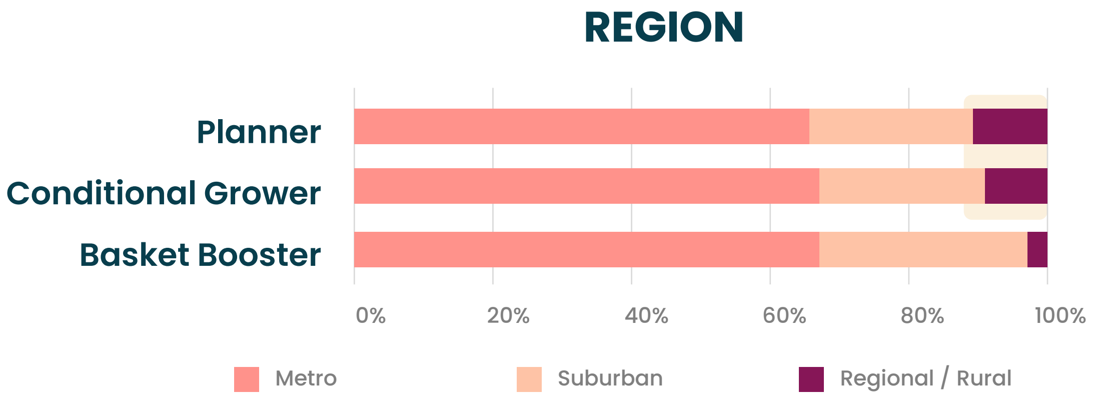
High willingness to increase basket size offers **great value** despite its smaller size, requiring nurturing to drive growth and build loyalty.

DEMOGRAPHIC BREAKDOWN









THE PERSONAS

	PLANNER	CONDITIONAL GROWER	BASKET BOOSTER
AGE	Broad appeal across all ages, slightly favoring the **55+** demographic.	Strong presence across all ranges, with a slight emphasis on the **35-54** bracket	Strong presence across all ranges, with a slight emphasis on the **younger 18-34** bracket
INCOME	Mid-income	Mid / High income	High income
EDUCATION	University / Vocational technical college	University / Secondary school	University / Postgraduate
CONSUMPTION PRIORITIES	Focus on **price sensitivity**, always seeking the ***best deal*** Tend to **buy only what they need** and ***prioritise value over extras*** **Less** influenced by ***impulse purchases*** or ***premium offers***	Look for a ***balanced experience*** with **good value for money** **Moderate** inclination to spend more when CX expectations are met Interested in ***convenience features*** like **click-and-collect** and **easy returns**	**Willing to grow basket size** for ***premium CX*** and ***seamless service*** Prioritise **convenience, fast delivery,** and **hassle-free returns.** **Impulse-driven** with ***frequent unplanned purchases***
LOCATION	Metropolitan / Suburban	Metropolitan / Suburban	Metropolitan areas

WHO DOES MORE UNPLANNED SHOPPING – IN-STORE

*Figures of making impulse purchases **most of the time / always***

22%	33%	48%
PLANNER	CONDITIONAL GROWER	BASKET BOOSTER

Basket Boosters make nearly **twice as many unplanned purchases** as ***Planners***, presenting a key opportunity for customer teams to engage this group in a shifting economy.

HOW MUCH UNPLANED SHOPPING IS ONLINE

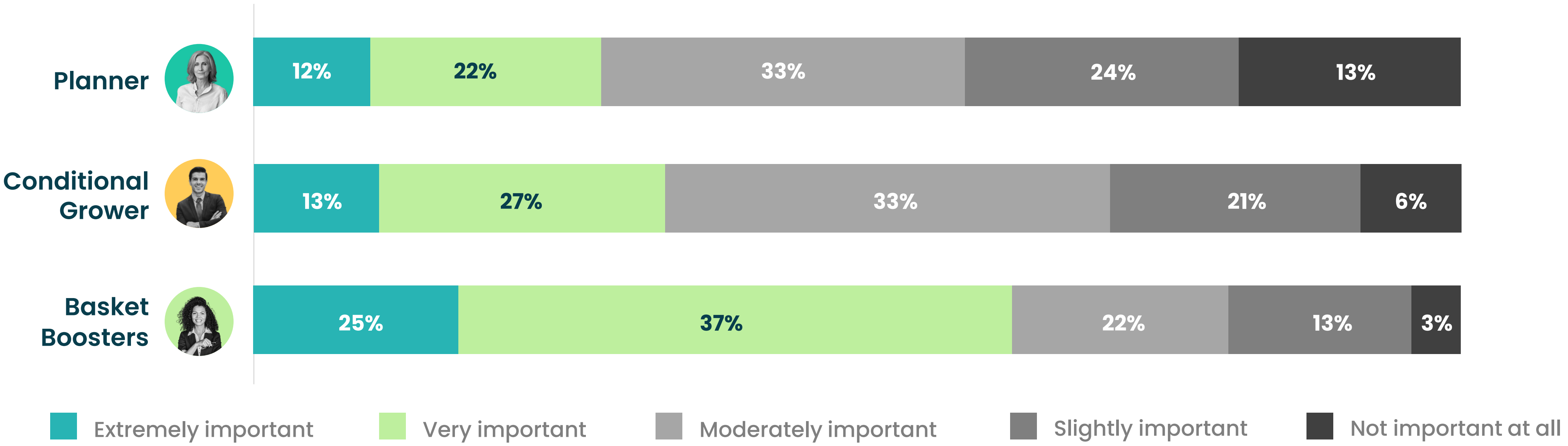
*Figures of making impulse purchases often **/ always***

13%	20%	25%
PLANNER	CONDITIONAL GROWER	BASKET BOOSTER

Basket Boosters again, make nearly **twice as many unplanned purchases** as ***Planners***, presenting a key opportunity for customer teams to engage this group in a shifting economy.

How ever all three mindsets **10 to 15% lower** than **in-store**.

WHO PUTS MORE VALUE ON RETURNS



Basket Boosters are the ones who **care the most** about the **return process**, while ***Planners*** care the least.

VALUED FACTORS IN THE RETURN PROCESS

Top 3 factors by persona

PLANNER

1. Hassle-free returns (e.g., no need for original packaging)
2. No additional restocking or return fees
3. Clear and transparent return policies

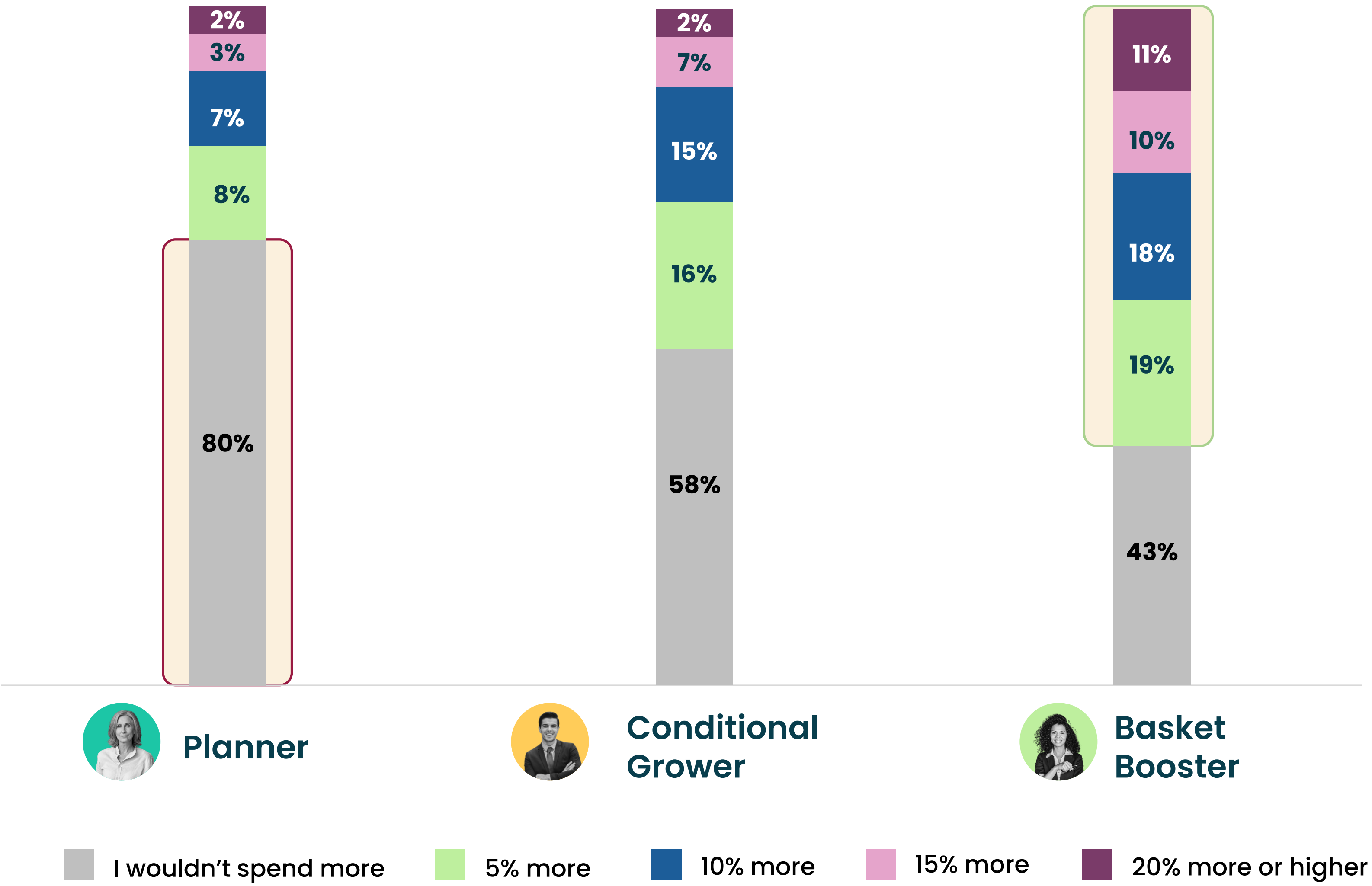
CONDITIONAL GROWER

1. Hassle-free returns (e.g., no need for original packaging)
2. Fast or instant refunds
3. Prepaid return shipping labels

BASKET BOOSTER

1. Fast or instant refunds
2. No additional restocking or return fees
3. Hassle-free returns (e.g., no need for original packaging)

WILLINGNESS TO PAY A PREMIUM FOR AN IDEAL RETURN EXPERIENCE



Basket Boosters not only consider the return process important for increasing basket size but are also ***more willing to pay a higher premium*** compared to other personas, while ***Planners are the least willing.***

Opportunity

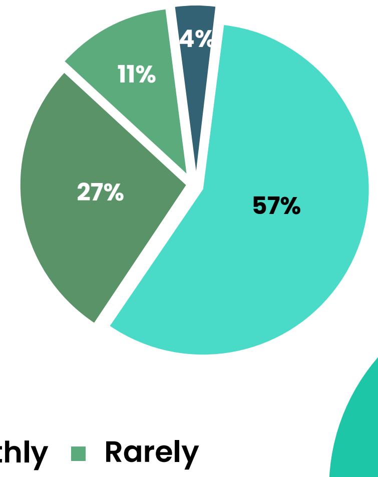
A large segment of the market that is especially ***sensitive to deals and promotions***.

PLANNER

35%
Market share

WHAT CHARACTERIZES THE PLANNERS' SHOPPING PATTERNS?

Frequency



Lowest physical store shopping frequency compared to other personas

Pre-Purchase Research

Top research is about the ***price***

Promotions

For ***finding promotions*** they prefer ***in-store shopping***

Unlike the majority who lean towards online

Patterns in the last 12 months

Shows the least change in shopping patterns.

WHAT CHARACTERIZES THE PLANNERS?

Delivery

Has the ***highest delivery delay tolerance***, and ***cost*** is the most important factor.

Click and Collect

It's the persona that finds **click and collect** ***less important***

32% *not finding it important at all.*

Abandon Cart

The ***most important factor*** for them when ***abandoning carts***:

In-store

- *Prices were too high*
- *Couldn't find what I needed*
- *Product was out of stock*

Online

- *High delivery fees*
- *Found a better deal elsewhere*
- *Delivery time too long*

Follow-Up

They are the persona for whom ***follow-up communication is less-effective***

Over ***50%*** saying it is **not effective at all**, compared to ***32%*** for the rest of the personas.

Opportunity

High-value mindset with disposable income.

Value CX experience and less price-sensitive.

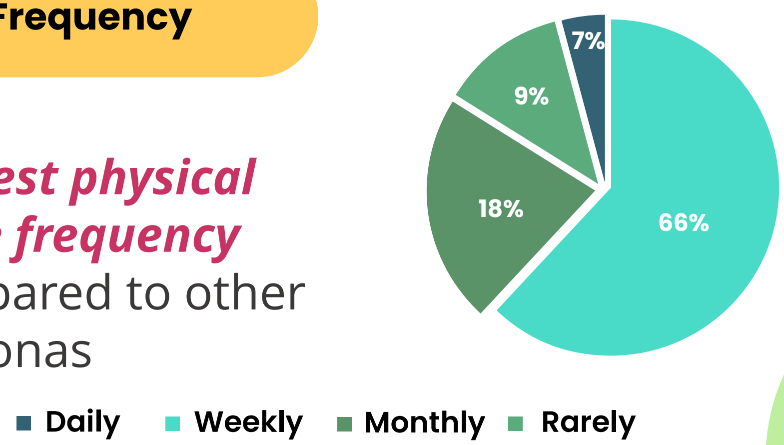
Value discretionary products and experiences.

BASKET BOOSTER

21%
Market share

WHAT CHARACTERIZES THE BASKET BOOSTERS?

Frequency



Highest physical store frequency compared to other personas

Pre-Purchase Research

Top research is about the **stock availability**

Promotions

For ***finding promotions*** they prefer **online**

Patterns in the last 12 months

Most changes in shopping patterns with **84%** having changed in the last 12 months.

WHAT CHARACTERIZES THE BASKET BOOSTERS?

Delivery

Has the ***lowest delivery delay tolerance,*** while **cost** being the **most important factor.**

41% will go to store after 4 days while the average is ***30%***

Click and Collect

It's the persona that finds **click and collect *more important***

47% *finding it very or extremely important.*

Abandon Cart

The ***most important factor*** for them when ***abandoning carts***:

In-store	Online
• *Prices were too high* • *Product was out of stock* • *Couldn't find what I needed*	• *High delivery fees* • *Delivery time too long* • *Found a better deal elsewhere*

Follow-Up

They are the persona for whom ***follow-up communication is most effective***

Over ***31%*** saying it is **very or extremely effective,** compared to ***15%*** average of all the personas.

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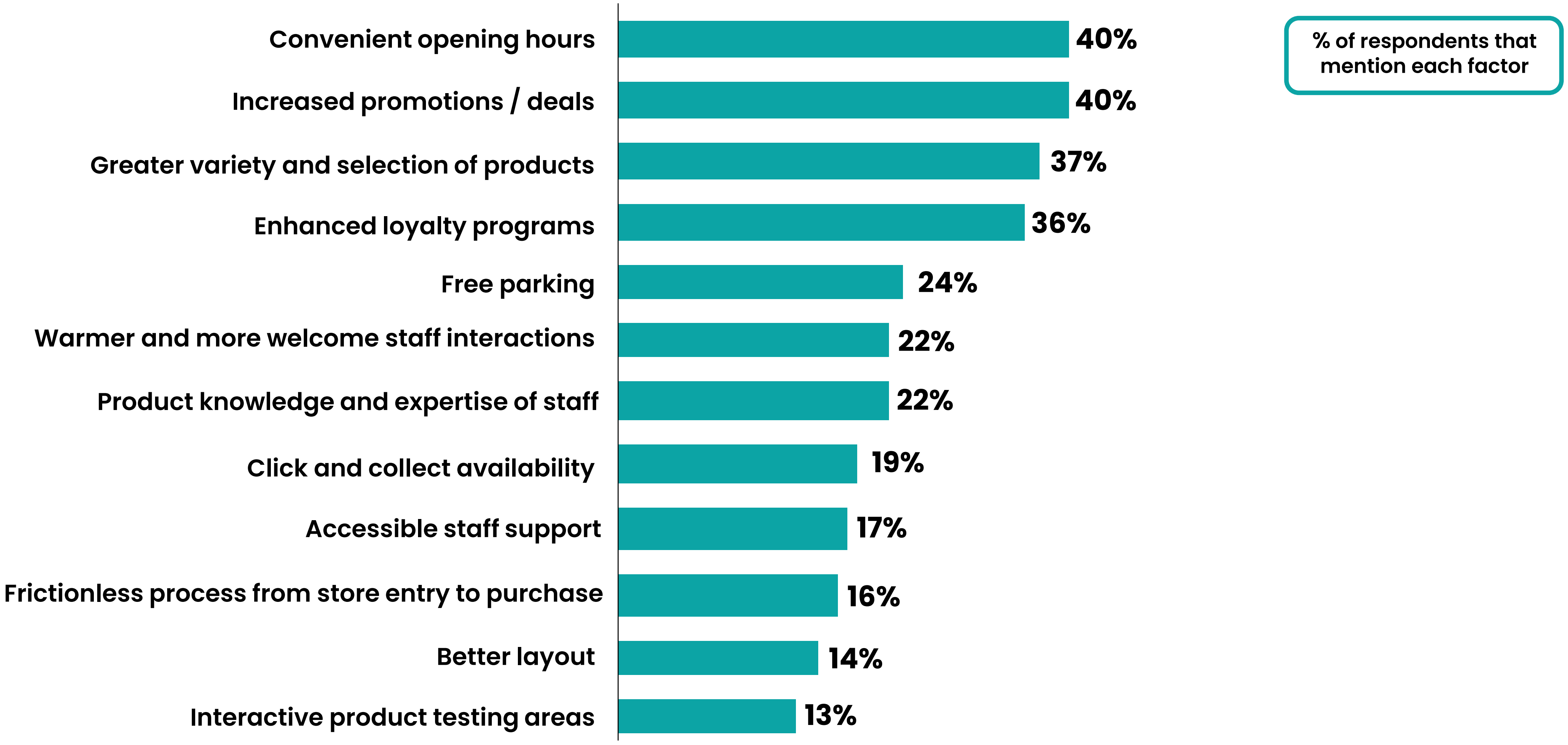
PART 7

Driving greater revenue through dream experiences

- Understand *what drives modern shoppers to return* and their ideal experiences.
- Assess how improvements shape behavior, value perception, and *pricing willingness*.

UNLOCKING VALUE IN THE IN-STORE DREAM EXPERIENCE



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UNLOCKING VALUE IN THE IN-STORE DREAM EXPERIENCE

Varied Shopper Sensitivities

PLANNER

1. Increased promotions/deals
2. Greater variety and selection of products
3. Convenient opening hours

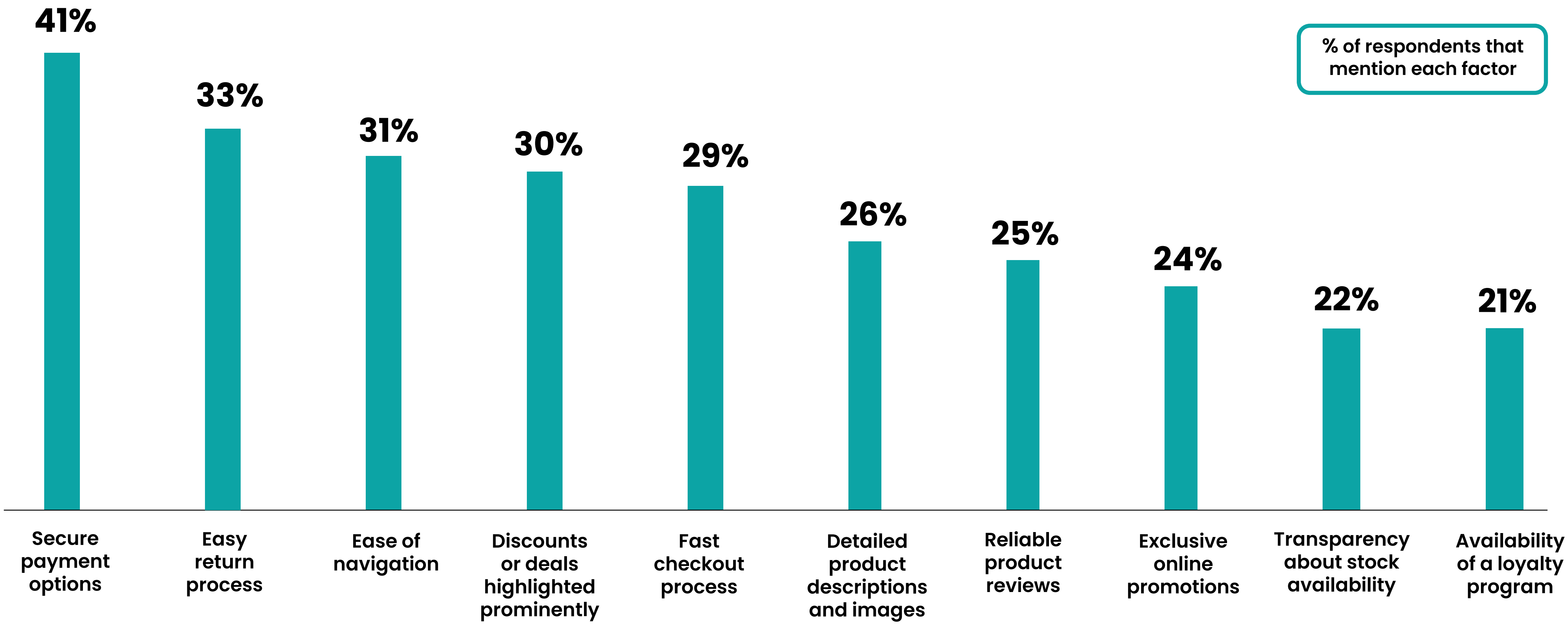
CONDITIONAL GROWER

1. Convenient opening hours
2. Increased promotions/deals
3. Greater variety and selection of products

BASKET BOOSTER

1. Enhanced loyalty programs
2. Convenient opening hours
3. Increased promotions/deals

UNLOCKING VALUE IN THE ONLINE DREAM EXPERIENCE

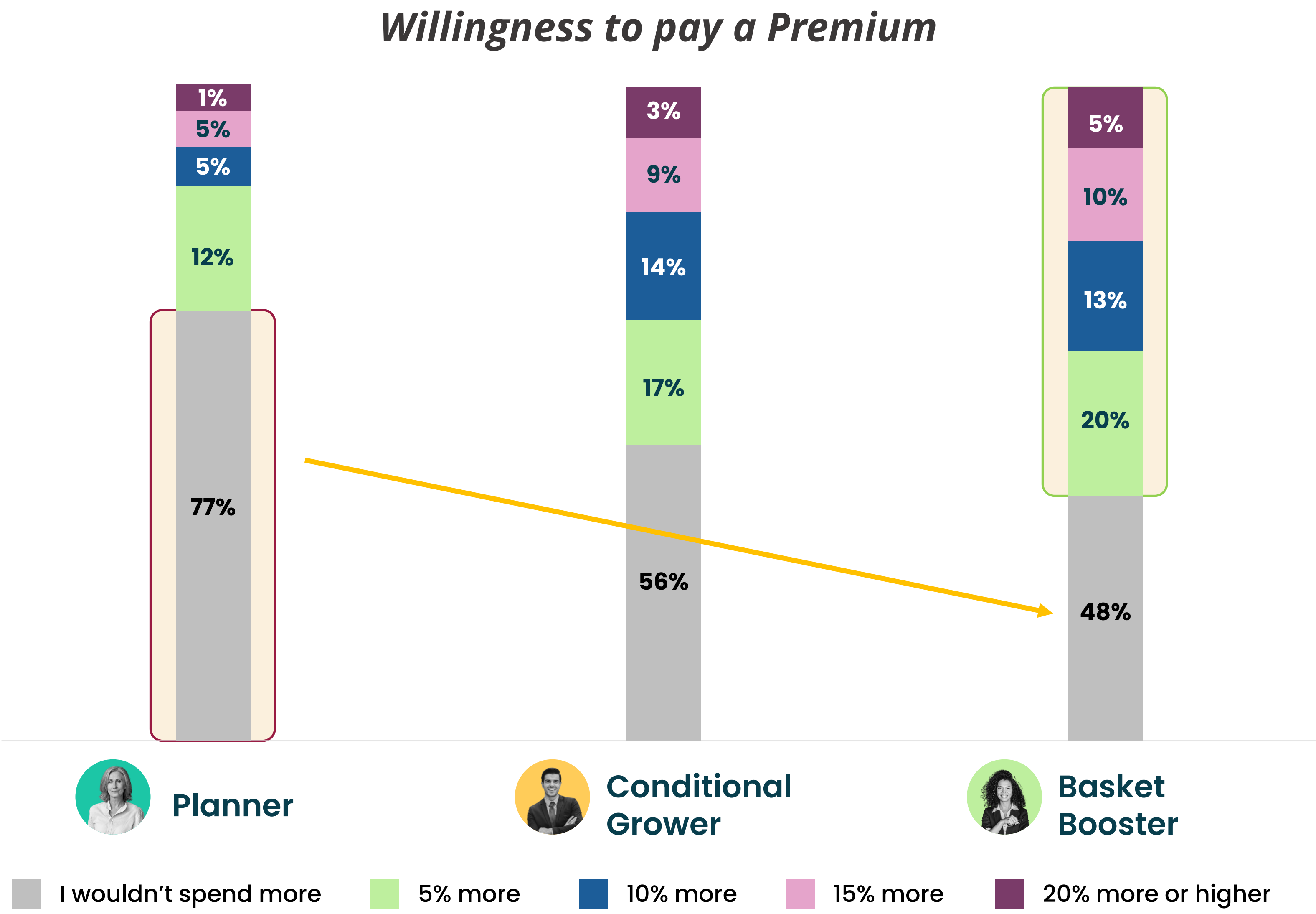


UNLOCKING VALUE IN THE ONLINE DREAM EXPERIENCE

Varied Shopper Sensitivities

PLANNER	CONDITIONAL GROWER	BASKET BOOSTER
1 Ease of navigation	1 Easy return process	1 Easy return process
2 Secure payment options	2 Secure payment options	2 Secure payment options
3 Discounts or deals highlighted prominently	3 Detail product descriptions and images	3 Fast checkout process

UNLOCKING VALUE IN THE DREAM EXPERIENCE



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OUR EXPERTS

Mita Bedi
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The insights presented in this report are based on a survey of 900 respondents, conducted with a 95% confidence level and a margin of error of ±5%.

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Unlock Retail Growth

Increase Conversion
Optimise the Sales Journey

Increase Recommendation
Greater Customer Lifetime Value

Product & Service Development
Value Added Services

Experience is the Differentiator
Move away from Price Competition

Increase Market Share
Highly Competitive

Reduce Complaints and Churn
Turn Detractors to Promoters

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