Cust²Mate
AN A2Z COMPANY

SURVEY REPORT

THE EXPECTATION GAP IN PHYSICAL RETAIL

Digital-Age Consumers Share Six Expectations Reshaping the In-Store Experience

Based on a global survey of 1,600 consumers across the United States and Europe

A2Z Cust2Mate Research | 2026 | www.cust2mate.com

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EXECUTIVE SUMMARY

Physical retail is entering a new competitive era. Consumers who have grown accustomed to the speed, convenience, transparency, and personalization of online commerce now walk into physical supermarkets expecting many of those same standards to follow them into the store. Increasingly, consumers no longer evaluate online and in-store shopping as separate experiences, but as connected parts of the same shopping journey.

Yet this survey reveals a persistent and measurable expectation gap: while consumer expectations have evolved rapidly, the physical supermarket experience has not kept pace. Across the dimensions consumers now value most; in-store retail consistently falls short of delivering the level of convenience, intelligence, and responsiveness consumers have come to expect elsewhere.

This report is based on an original survey of 1,600 consumers across the United States and Europe and examines six digital age expectations that are increasingly shaping how consumers evaluate physical retail. The survey validated the conclusions presented in Cust2Mate's white paper, When Online Expectations Enter the Physical Store, and uses them as the analytical framework for this study.

These expectations fall into two distinct groups.

Three Established Expectations

These are expectations consumers already hold clearly today and actively notice when stores fail to meet them. They are increasingly viewed as fundamental components of a modern shopping experience.

Seamless – Consumers expect the in-store experience to feel effortless, intuitive, and free of unnecessary friction.

Examples include fast checkout, short lines, easy navigation, and smooth flow throughout the store.

Transparent – Consumers expect clarity and real-time visibility into pricing, savings, and purchase value.

Examples include clear pricing, visible discounts, and real-time running basket totals.

Rewarding – Consumers expect value and loyalty benefits to be delivered automatically and at the right moment.

Examples include timely promotions, personalized discounts, and seamless reward redemption.

Consumers not only value them highly but often change or abandon purchasing decisions when they are missing.

Three Emerging Expectations

These expectations are less established in physical retail but increasingly familiar to consumers through digital commerce experiences. While many consumers do not yet fully expect these capabilities in-store, the survey suggests they create meaningful value and influence behavior when delivered effectively.

Guiding – Consumers expect stores to actively support decision-making and product discovery.

Examples include easy product finding, contextual information, and intelligent recommendations.

Continuous – Consumers expect their relationship with a retailer to continue seamlessly across digital and physical channels.

Examples include synced shopping lists, recognized preferences, and connected loyalty experiences.

Relevant – Consumers expect experiences tailored to their immediate needs, context, and preferences.

Examples include personalized offers based on basket content, location in-store, and shopping behavior.

Unlike the first group, these expectations are still emerging because many consumers have not yet consistently experienced them in physical retail. However, the findings suggest they represent a significant opportunity for retailers to differentiate the in-store experience, influence purchasing decisions, and strengthen consumer engagement and loyalty.

For each of the six expectations, the survey measured two dimensions: the importance consumers assign to the expectation, and how well they believe physical supermarkets currently deliver on it. The difference between these two measures, referred to throughout this report as "the expectation gap", serves as the central analytical lens of the research.

Across all six expectations, consumers consistently rated the importance of the experience higher than supermarkets' current ability to deliver it.

Expectation	% Who Rate It Very Important	% Who Say It's Delivered Well	Gap
Seamless	60%	36%	−24 pts
Transparent	68%	48%	−20 pts
Rewarding	50%	31%	−19 pts
Guiding	58%	46%	−12 pts
Continuous	43%	33%	−10 pts
Relevant	33%	26%	−7 pts

* **% Important** – Share of consumers who rated this expectation as highly important when shopping in a physical store (scores of 6–7 on a 1–7 scale).

** **% Delivered** – Share of consumers who rated their experience as highly positive on this expectation during their most recent shopping trip (scores of 6–7 on a 1–7 scale).

The largest gaps emerged around operational friction, pricing transparency, and access to promotions, areas where consumers increasingly expect supermarkets to operate with the same responsiveness and visibility they experience online.

At the same time, the survey reveals substantial opportunity around emerging expectations such as contextual guidance, connected journeys, and real-time relevance. While many consumers have not yet consistently experienced these capabilities inside physical stores, those who do respond positively and often change purchasing behavior as a result.

One of the clearest insights from the survey is that physical stores are falling short of delivering an excellent experience: across all six expectation areas, fewer than half of consumers rated their in-store experience as highly positive, and for four of the six expectations, fewer than one third did.

The commercial implications are significant:

52%
of consumers could not find a product and either abandoned the purchase or substituted it.

46%
missed promotions they were already eligible for.

45%
chose not to buy due to unclear pricing or discounts.

32%
abandoned purchases because of checkout friction.

39%
purchased products because of timely promotions or suggestions received while shopping.

The Path to Closing the Gap

Closing the six expectation gaps identified in this report is within reach. What it requires is a connected in-store experience that links consumers, store operations, promotions, product information, loyalty programs, and digital activity in real time. These are capabilities increasingly delivered through connected in-store technologies such as smart carts.

The survey signals strong consumer readiness for exactly this transition. **52% of US consumers** and **47% of European consumers** say they are very or extremely likely to use a smart shopping cart that helps them track spending, find products, receive discounts, and speed up checkout.

Across both markets, roughly half of consumers are already eager to embrace technology that directly addresses the experience gaps identified in this report.

The opportunity is clear. Consumer readiness is there. Consumers are not waiting to be convinced of the value of a connected in-store experience; they are waiting for retailers to make it available. As consumer expectations continue to evolve, the retailers that successfully close these gaps will be best positioned to strengthen loyalty, recover lost revenue, and define the next generation of physical retail.

1

THE DIGITAL CONSUMER HAS ALREADY ENTERED THE STORE

For most of retail history, the physical store defined the shopping experience. Consumers came to the store on its terms: navigating aisles, searching for products, waiting in line, and completing checkout according to the retailer's operational model.

That dynamic has fundamentally changed.

Over the past decade, digital commerce has reshaped how consumers think shopping should work. Online platforms conditioned consumers to expect speed, visibility, convenience, personalization, and immediate access to information. Those expectations no longer remain online. Increasingly, consumers bring them directly into the physical store.

At the same time, the competitive landscape has shifted just as dramatically. Physical supermarkets no longer compete only against nearby stores. Increasingly, they compete against digital alternatives that allow consumers to avoid the store altogether. Click-and-collect, delivery platforms, and app-based grocery ordering have transformed "staying home" into a viable substitute for many shopping trips.

In this environment, the physical store must do more than simply fulfill transactions. It must justify the visit.

Today's supermarket consumer does not begin the shopping journey at the store entrance. Increasingly, the journey starts earlier, on a smartphone, through a retail app, while comparing prices, searching for promotions, building shopping lists, or planning purchases before ever entering a physical aisle.

Understanding this digitally conditioned consumer is essential to understanding the expectation gaps explored throughout this report.

To focus specifically on the relationship between digital behavior and in-store expectations, the survey included only respondents who actively participate in both worlds: consumers who purchase online at least occasionally and who also shop in physical supermarkets. Respondents who never shop online or never visit supermarkets were excluded from the study.

The survey shows that today's supermarket consumer is deeply digitally engaged:

32% shop online at least once a week,

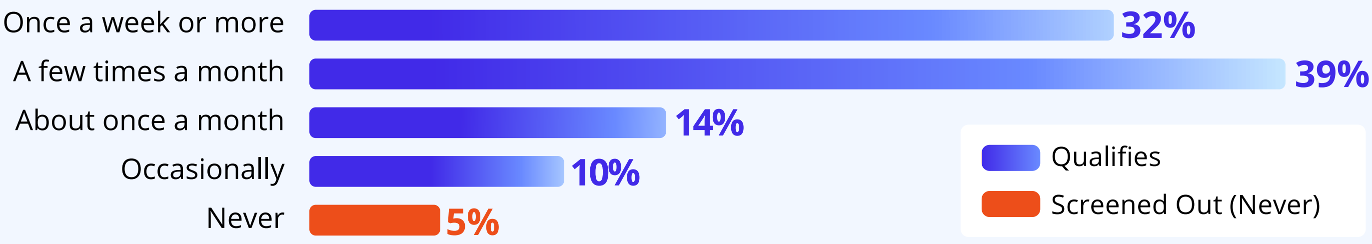
an additional **39%** shop online several times a month,

and nearly **70%** visit supermarkets at least weekly.

These are not consumers choosing between online and physical retail. They actively use both channels, often within the same shopping journey.

Screening Question 1

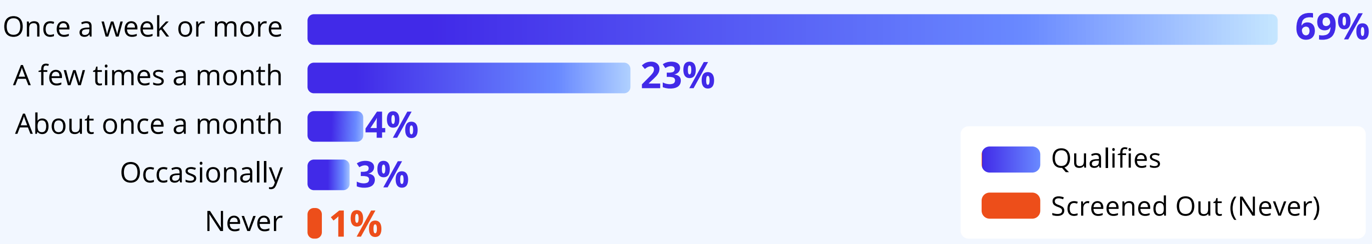
How often do you shop in online stores?



% of respondents | n=1,702 | USA & Europe

Screening Question 2

How often do you shop at a supermarket store?



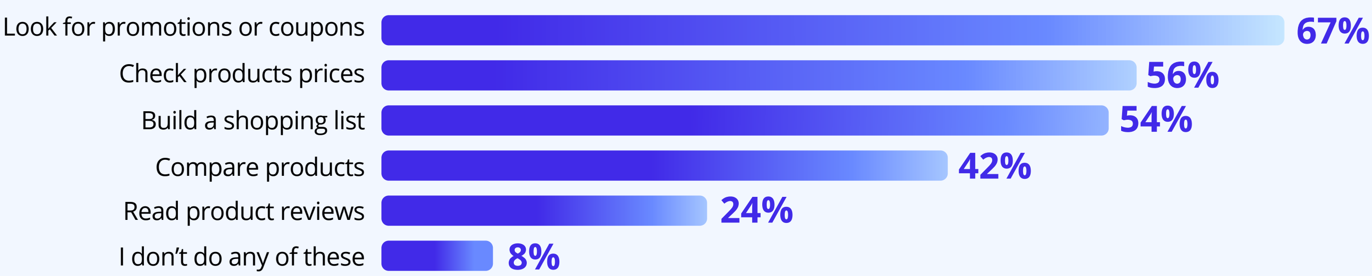
% of respondents | n=1,618 | USA & Europe

What matters most is what happens before consumers even enter the store. Before visiting a supermarket, consumers increasingly:

search for promotions or coupons **67%**
compare product prices **56%**,
build digital shopping lists **54%**.

Q2

Before going to a supermarket, which of the following do you typically do online or in an app?



% of respondents | n=1,600 | USA & Europe

The implication is significant: the supermarket visit increasingly begins digitally. By the time consumers walk through the door, many already expect continuity between what they prepared online and what they experience in-store.

When promotions are difficult to find, prices feel unclear, digital lists disappear, or checkout becomes frustrating, consumers experience a disconnect between the standards digital commerce has normalized and the realities of physical retail.

2

THE EXPECTATION GAP: WHERE RETAILERS ARE FALLING SHORT

The core finding of this research is straightforward: across every expectation measured in the study, consumers believe supermarkets are underdelivering relative to what modern shopping experiences should feel like.

The largest gaps emerged around seamlessness, transparency, and rewards, suggesting that many supermarkets still struggle to provide the operational speed, visibility, and contextual engagement consumers increasingly consider standard.

Expectation	What Consumers Want	% Important	% Delivered Well	Gap
Seamless	Effortless, friction-free shopping	60%	36%	−24 pts
Transparent	Clear pricing and spend visibility	68%	48%	−20 pts
Rewarding	Timely and automatic access to value	50%	31%	−19 pts
Guiding	Help finding and evaluating products	58%	46%	−12 pts
Continuous	Connected digital-to-store experiences	43%	33%	−10 pts
Relevant	Personalized and contextual engagement	33%	26%	−7 pts

For each of the six expectations, respondents were asked two questions*:
- how important the experience is to them, and
- how well supermarkets currently deliver it.

All percentages represent respondents who gave high ratings (6 or 7 on a 7-point scale).
The difference between importance and delivery is referred to throughout this report as the "expectation gap."

* See questions in an Appendix

The established expectations – Seamless, Transparent, and Rewarding — represent areas where consumers already have fully formed expectations shaped by digital commerce. Consumers know exactly what these experiences should feel like because they encounter them regularly online.

The emerging expectations – Guiding, Continuous, and Relevant — represent a different kind of opportunity. Their gaps are smaller not necessarily because retailers perform well today, but because many consumers have not yet consistently experienced these capabilities inside physical stores.

Once introduced, however, these experiences quickly become intuitive and valuable to consumers, creating an opportunity for retailers not only to close gaps, but to shape future expectations.

The following chapters examine each expectation individually, exploring where consumer frustration is strongest, how these gaps influence purchasing behavior, and where retailers have the greatest opportunity to improve the in-store experience.

3

ESTABLISHED EXPECTATIONS: WHAT CONSUMERS ALREADY DEMAND

3.1 **Seamless:** Where Friction Becomes Lost Revenue

Seamlessness produced the largest expectation gap in the study. Consumers increasingly expect supermarket visits to be fast, intuitive, and free of unnecessary friction. Yet despite years of investment in store operations and self-service technologies, many consumers still encounter delays, queues, and interruptions that make the experience feel slower and more difficult than it should.

60%
of consumers say fast, hassle-free shopping is highly important

Yet only
36%
of consumers believe supermarkets currently deliver it consistently.

24 points gap
The largest gap of all six expectations

The operational Consequences are significant:

32% of consumers report having abandoned a purchase or left a store specifically because of long checkout lines.

This is not simply a satisfaction issue. Retailers successfully generated purchase intent but failed to convert it at the final stage of the shopping journey.

Globally, 65% of consumers rank seamlessness among the most important factors shaping their store experience. The expectation is especially strong in the United States (68% vs. 55% in Europe), while millennials rank it as their single most important in-store expectation.

When asked which single improvement would most improve their shopping experience, 22% of consumers selected faster, smoother shopping, the second-highest response in the survey. Few issues generate this level of consensus across consumers, making seamlessness one of the clearest opportunities for retailers to improve both conversion and customer experience.

Retailer Priority: Seamlessness

Eliminate checkout friction. Reduce waiting, queues, and unnecessary steps that slow consumers down at the final stage of the journey.

Give consumers greater autonomy. Enable consumers to find products, access information, and complete purchases independently without relying on staff assistance.

Keep the journey moving. Remove interruptions and operational bottlenecks that prevent consumers from moving efficiently through the store.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- track spending in real time,
- navigate more efficiently,
- access information instantly,
- and complete checkout with minimal interruption.

3.2 **Transparent:** When Uncertainty Suppresses Spending

Transparency emerged as the single highest-rated expectation in the survey. As consumers become accustomed to real-time visibility into prices, discounts, and spending online, they increasingly expect the same level of clarity inside the physical store. Yet many still struggle to understand what they are saving, what promotions apply, and what their final basket will cost until they reach checkout.

68%

of consumers say real-time visibility into pricing, discounts, and basket totals is highly important

Yet only

48%

of consumers believe supermarkets currently deliver it effectively.

20 points gap

#2 largest gap of all six expectations

The commercial impact is substantial:

45% of consumers chose not to buy a product because pricing or discounts were unclear.

Globally, 69% of consumers rank pricing transparency among their top in-store priorities, making it the highest-rated expectation in the study. The demand is consistent across markets, although slightly stronger in Europe, where pricing clarity is the most requested area for improvement (24% vs. 19% in the United States). The importance consumers place on transparency is reflected in behavior as well: 45% report deciding not to buy a product because pricing or discounts were unclear, highlighting how directly uncertainty can suppress conversion and spending.

What consumers increasingly expect is the same visibility they experience online: clear pricing, obvious savings, and real-time awareness of what they will ultimately pay. Transparency is also one of the few expectations where boomers and generation z strongly align, both ranking it among the most important dimensions of the shopping experience. This convergence suggests that the demand for transparency is not generational, but structural. When consumers lack confidence in pricing and discounts, spending becomes more cautious and purchase decisions are delayed or abandoned altogether.

Retailer Priority: Transparency

Make pricing visible throughout the journey. Give consumers real-time visibility into prices, discounts, savings, and basket totals while they shop, not only at checkout.

Surface value at the moment of decision. Ensure promotions and discounts are easy to find, understand, and apply while consumers are still making purchase choices.

Create one consistent pricing truth. Align displayed prices, promotions, and checkout totals in real time to build consumer confidence and trust.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- see prices and savings in real time,
- track basket totals as they shop,
- receive relevant promotions automatically,
- and make purchase decisions with greater confidence.

3.3 **Rewarding:** When Value Fails to Reach the Consumer

Rewarding experiences emerged as one of the largest unmet needs in the study. More than any other expectation, consumers identified automatic access to promotions and rewards as the single improvement they most want supermarkets to make.

50%

of consumers say it is very important not to miss discounts, promotions, and rewards while shopping.

Yet only

31%

of consumers say supermarkets currently perform effectively with timely offers.

19 points gap

#3 largest gap of all six expectations

The operational impact is substantial:

> **46% of consumers** say they have missed a discount or promotion they were already eligible for.

Globally, **38% of consumers rank rewards and promotions among their most important in-store factors,** with demand particularly strong in the United States. One in four American consumers (25%) identify promotions and rewards as the single improvement they most want retailers to make, compared with 19% in Europe. The importance consumers place on value is reflected in their behavior as well: searching for promotions or coupons before a supermarket visit is the most common pre-trip activity across every generation surveyed.

What consumers increasingly expect is not simply more discounts, but less effort in accessing them. In digital commerce, relevant offers are surfaced automatically, applied seamlessly, and presented while decisions are being made. In physical retail, promotions often remain fragmented across loyalty programs, apps, coupons, shelf tags, and checkout-stage redemption processes. The result is that many consumers never receive value they were already entitled to. When promotions fail to reach consumers at the moment of decision, retailers lose an opportunity to influence conversion, basket size, and loyalty.

Retailer Priority: Reward

Embed value into the shopping journey. Move promotions and rewards from a checkout-stage function to an active part of the in-store experience where they can influence decisions before the basket is complete.

Surface savings at the moment of decision. Deliver relevant promotions contextually and in real time while consumers are evaluating products in the aisle.

Remove friction from reward redemption. Eliminate the need for consumers to search for offers, activate coupons, scan loyalty apps, or manually claim value they have already earned.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- discover relevant savings in real time,
- receive promotions automatically,
- access loyalty benefits effortlessly,
- and make more informed purchase decisions at the shelf.

4 EMERGING EXPECTATIONS: THE NEXT COMPETITIVE FRONTIE

The next generation of in-store expectations is already beginning to emerge. While consumers may not yet articulate these expectations as clearly as they do seamless checkout or pricing transparency, the survey suggests that once consumers experience them, the value becomes immediately intuitive. These expectations represent an opportunity not only to improve the shopping experience, but to define the next competitive standard in physical retail.

4.1 **Guiding:** The Missing Layer Between Products and Decisions

Guiding represents one of the largest untapped opportunities in physical retail. While digital commerce increasingly helps consumers discover, compare, and evaluate products effortlessly, many supermarket consumers still struggle to find what they need or make informed decisions in the aisle.

58%

of consumers say it is very important to easily find products and access information such as ingredients, alternatives, and reviews.

Yet only

46%

of consumers say they can easily do that in the supermarket today.

12 points gap

#4 largest gap of all six expectations

The commercial impact is significant:

52% of consumers say they could not find a product and chose either not to buy it or to purchase an alternative instead.

Globally, 61% of consumers rank guiding capabilities among their most important in-store factors. The expectation is especially strong in Europe, where 67% of consumers rate it highly compared to 58% in the United States. The demand is reflected in improvement priorities as well: 20% of European consumers identify guidance as the single improvement they most want retailers to make, compared with 14% of American consumers.

What consumers increasingly expect is not simply product availability, but contextual assistance throughout the shopping journey. They want help locating products, evaluating alternatives, accessing relevant information, and discovering items aligned with their needs and preferences. When that guidance is missing, consumers often abandon intended purchases, settle for second-choice products, or miss opportunities for discovery altogether. The products may already exist inside the store, what is often missing is the ability to connect the right consumer with the right product at the right moment.

Retailer Priority: Guidance

Bring digital product discovery into the aisle. Help consumers locate products, compare options, and access decision-support information in real time.

Reduce the effort required to choose. Make it easier for consumers to evaluate alternatives confidently instead of defaulting to habitual choices, substitutions, or abandoned purchases.

Turn routine trips into discovery moments. Surface relevant products, alternatives, and complementary items during the journey to increase engagement and basket growth.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- find products more efficiently,
- access contextual product information instantly,
- discover relevant alternatives, complementary items and new product categories
- and make purchase decisions with greater confidence.

4.2 Continuous: The Digital Journey Should Not Stop at the Store Door

Consumers increasingly begin their supermarket journey before they ever enter the store. They search for promotions, compare prices, build shopping lists, save coupons, and engage with retailers digitally. Yet when they arrive in-store, that context often disappears, forcing consumers to start the journey over again.

43%

of consumers say it is very important that their online shopping activity, including saved lists, digital coupons, and loyalty rewards, is available when they arrive in-store.

Only

33%

of consumers say supermarkets connect their online and in-store experience effectively.

10 points gap

#5 largest gap of all six expectations

The disconnect is already affecting consumers:

17% say they could not access their online activity while shopping in-store.

Globally, digital preparation is already widespread: 67% of consumers check for promotions online before visiting a supermarket, 56% compare prices, and 54% build shopping lists digitally. The online journey is well established. What remains underdeveloped is the connection between that preparation and the physical shopping experience. The expectation is particularly strong in the United States, where 46% of consumers rate continuity as highly important, compared with 34% in Europe.

What makes continuity unique is that many consumers have never fully experienced it. As a result, relatively few rank it among their top in-store priorities today (only 16%). This reflects unfamiliarity more than lack of demand. Once consumers experience a journey where lists, coupons, loyalty benefits, and preferences move seamlessly from digital channels into the store, the expectation changes. The physical store no longer feels like a separate channel, it feels like the continuation of an existing relationship.

Retailer Priority: Guidance

Carry the digital journey into the store. Ensure shopping lists, coupons, loyalty benefits, and preferences remain available and actionable throughout the in-store experience.

Recognize consumers across channels. Make the store feel like a continuation of the relationship already established online rather than a separate and disconnected experience.

Build continuity into every touchpoint. Connect digital interactions, loyalty programs, promotions, and shopping activity into a single seamless journey.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- access digital lists and coupons while shopping,
- see loyalty benefits and rewards automatically,
- continue journeys started online,
- and enjoy a more connected and personalized in-store experience.

4.3 **Relevant:** When Personalization Becomes Context

Relevance produced the smallest expectation gap in the survey, but also one of its most important strategic signals. The relatively small gap does not indicate strong retailer performance. Rather, it reflects the fact that many consumers have not yet consistently experienced meaningful in-store personalization and therefore do not fully recognize what is possible.

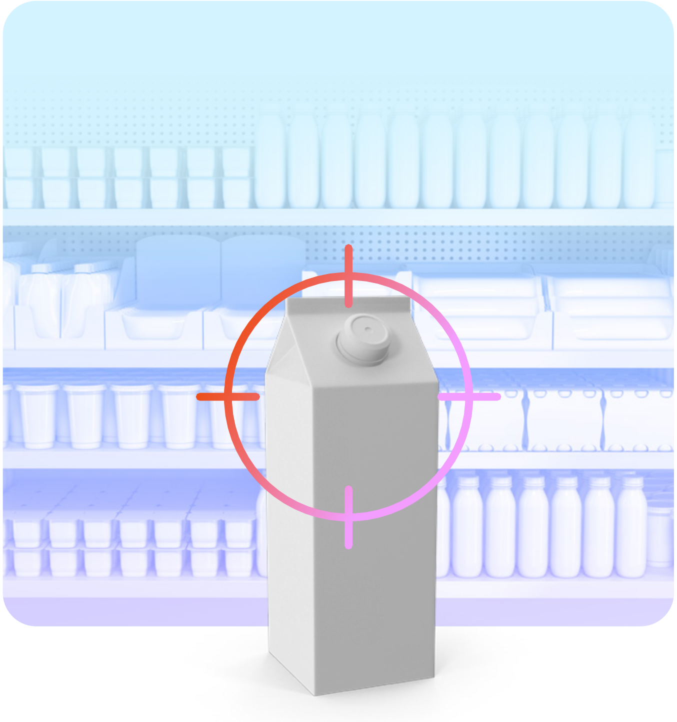
33%

of consumers say it is very important to receive personalized offers or suggestions while shopping, based on their cart, preferences, or location in the store.

Yest only

26%

of consumers say supermarkets provide personalized offers or suggestions effectively.



7 points gap

#6 largest gap of all six expectations

The behavioral impact is already evident:

39% of consumers say they have purchased an item because of a promotion or suggestion received while shopping.shopping in-store.

Globally, **19% of consumers rank relevance among their most important in-store factors**, with somewhat stronger demand in Europe than in the United States (25% vs. 19%). While relevance may not yet rank among the highest stated priorities, consumer behavior suggests its influence is already significant. Nearly four in ten consumers report purchasing an item because of a timely recommendation or promotion received during the shopping trip.

What consumers increasingly respond to is not personalization in the traditional marketing sense, but contextual relevance at the moment of decision. Recommendations based on cart contents, location in the store, shopping habits, or dietary preferences feel fundamentally different from generic promotions delivered to broad audiences. Increasingly, consumers expect the store not only to know who they are, but to understand what they are trying to accomplish in that moment. The shift is from segmentation to real-time responsiveness.

Retailer Priority: Relevancy

Move beyond generic personalization. Deliver offers, recommendations, and services based on consumers' real-time context rather than broad customer segments.

Respond at the moment of decision. Surface relevant suggestions while consumers are evaluating products, not after the opportunity to influence behavior has passed.

Personalize the entire journey. Extend relevance beyond promotions to payment options, delivery choices, product alternatives, and services tailored to immediate consumer needs.

Connected in-store technologies such as smart carts increasingly enable consumers to:

- receive context-aware offers and recommendations,
- access alternatives relevant to their preferences and needs,
- enjoy experiences tailored to their shopping mission,
- and make more confident purchase decisions in real time.

5 THE BUSINESS CASE FOR CLOSING THE GAP

5.1 The Hidden Cost of the Experience Gap

The expectation gaps documented throughout this report are not simply experience issues. They translate into lost conversion, missed promotions, abandoned purchases, weaker loyalty, and unrealized revenue throughout the shopping journey. To understand the commercial impact of these gaps, consumers were asked about specific situations they had personally experienced while shopping in supermarkets.

The results reveal that these behaviors are widespread and occur at every stage of the in-store journey.

Q17

Have you ever experienced any of the following while shopping in a supermarket?

% of respondents | n=1,600 | USA & Europe | Multi-select question

52%

couldn't find a product and either chose not to buy it or purchased an alternative. *A product discovery failure becomes either lost conversion or unintended substitution, The value existed. The consumer qualified. The offer simply failed to reach the moment of decision.*

45%

decided not to buy a product due to unclear pricing or discounts. *Uncertainty suppresses purchasing behavior. When consumers lack confidence in what they will pay, conversion suffers.*

39%

bought an item due to a promotion or suggestion received while shopping. *Proof that timely, contextual engagement can directly influence purchasing behavior.*

32%

left a store or abandoned a purchase due to long checkout lines. *Demand was created, but operational friction prevented conversion.*

17%

couldn't access their online activity while shopping in-store. *A smaller figure today, but one likely to grow as consumers increasingly expect digital and physical experiences to work together.*

Taken together, these findings show that value is being lost throughout the shopping journey – not through a single failure, but through a series of friction points that reduce conversion, suppress spending, and weaken loyalty.

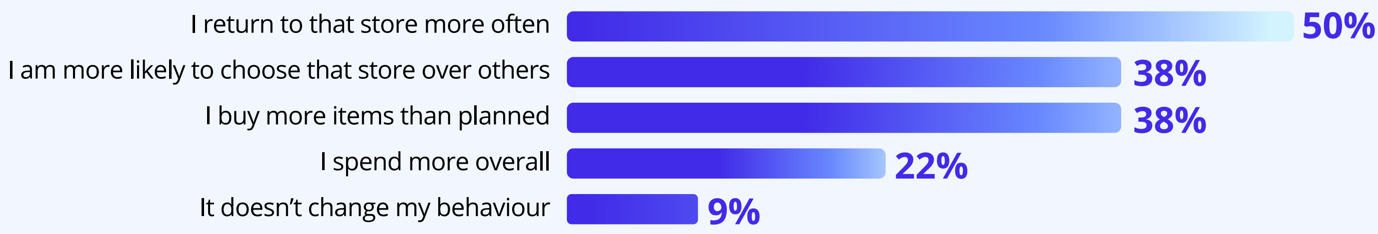
5.2 What a Better Experience Is Worth

If the previous chapter quantified the cost of the experience gap, this chapter quantifies the upside of closing it.

Consumers were asked how a faster, clearer, more connected, and more personalized shopping experience would influence their future behavior.

Q18

When the in-store experience is better (faster, clearer, more personalized), how does it affect your behavior?



% of respondents | n=1,600 | USA & Europe | Multi-select question

The strongest impact is on loyalty.

50% of consumers say they would return to the store more often, while 38% say they would be more likely to choose it over competitors. Together, these responses point to an 88% loyalty and preference signal, suggesting that the primary return on improving the in-store experience is stronger long-term customer retention.

The spending impact is also significant. 38% say they would buy more items than planned, and 22% say they would spend more overall. The effect is somewhat stronger in the United States than in Europe, but consistent across both regions.

A better in-store experience does more than improve satisfaction. It increases visit frequency, strengthens retailer preference, and expands spend, creating a durable competitive advantage in a market where both loyalty and share of wallet are increasingly contested.

6 CONSUMERS ARE READY FOR THE CONNECTED STORE

Closing the six expectation gaps identified in this report requires more than isolated operational improvements. It requires a connected in-store experience capable of linking consumers, store operations, promotions, product information, loyalty programs, and digital activity in real time.

Viewed individually, Seamless, Transparent, Rewarding, Guiding, Continuous, and Relevant may appear to be separate challenges. In practice, they depend on the same underlying capability: the ability to understand consumer context and respond dynamically throughout the trip.

Delivering these expectations means enabling consumers to:

- move through checkout with minimal friction,
- track spending and savings in real time,
- receive relevant promotions automatically,
- access product information and guidance instantly,
- connect digital activity to the in-store journey,
- and receive context-aware recommendations while shopping.

Increasingly, these capabilities are being delivered through connected in-store technologies such as smart carts. The survey suggests consumers are already ready for that transition.

52% of US consumers and **47% of European consumers** say they are very or extremely likely to use a smart shopping cart that helps them track spending, find products, receive discounts, and speed up checkout.

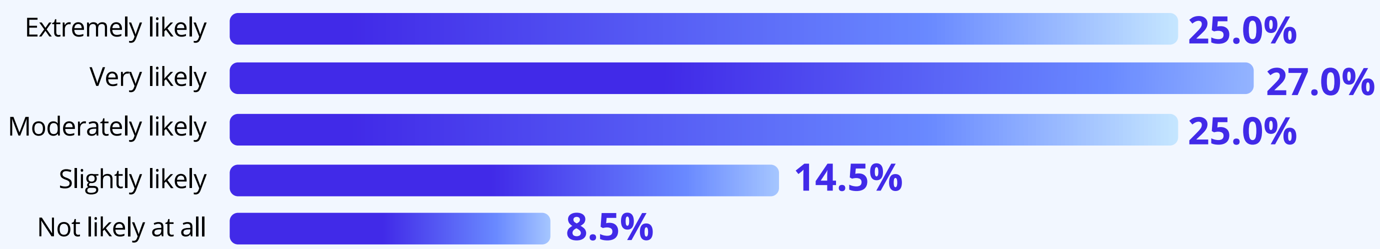
These are not niche adoption signals. Across both markets, roughly half of consumers already express strong willingness to use technology that directly addresses the experience gaps identified throughout this report.

The implication is important. Consumer readiness is no longer the limiting factor. Consumers are not waiting to be convinced of the value of a connected in-store experience; they are waiting for retailers to make it available.

As connected retail technologies become more common, expectations will continue to rise. Seamlessness, transparency, rewards, guidance, continuity, and relevance are unlikely to remain differentiators for long. They are rapidly becoming the next baseline for physical retail.

Q22

How likely would you be to use a smart shopping cart that helps track spending, apply discounts, find products, and speed up checkout?



% of respondents | n=1,600 | USA & Europe

7 CONCLUSIONS

This survey set out to measure a specific tension: the gap between what consumers now expect from physical supermarkets and what they actually experience in-store. Across six expectation areas and 1,600 consumers in the United States and Europe, the conclusion is clear: the gap is real, measurable, and commercially significant.

The established expectations – **Seamless, Transparent,** and **Rewarding** – are already fully formed in consumers' minds. Consumers know what they want because they experience it regularly in digital commerce. When physical supermarkets fail to deliver, the impact is immediate: baskets are abandoned at checkout, products are left behind because pricing is unclear, and promotions fail to reach consumers who were already eligible for them. These are not isolated frustrations; they are routine points of commercial leakage.

The emerging expectations – **Guiding, Continuous,** and **Relevant** – represent a different kind of opportunity. Their gaps are smaller not because supermarkets are performing well, but because many consumers have not yet experienced these capabilities consistently in-store. Demand is latent, not absent. Retailers that introduce these experiences early have the opportunity not only to close gaps, but to shape what consumers come to expect from the physical store.

The commercial case for action is clear. Consumers who experience faster, clearer, more connected, and more personalized store journeys say they will return more often, choose that store over competitors, and spend more when they visit. When this loyalty upside is combined with the revenue recovered from fewer abandoned baskets, clearer pricing, better promotion delivery, and stronger product discovery, improving the in-store experience becomes a business imperative.

Where Retailers Should Focus First

1 Eliminate Friction

Seamlessness produced the largest gap in the survey and one of the clearest revenue impacts. Every abandoned basket at checkout represents demand that failed to convert. Retailers must reduce operational friction, remove checkout bottlenecks, and make shopping faster from entry to payment.

2 Make Pricing Visible

Transparency is the highest-rated expectation in the study. Consumers increasingly expect real-time visibility into prices, discounts, savings, and basket totals throughout the journey. When that visibility is missing, confidence declines and purchases are delayed or abandoned.

3 Deliver Value Automatically

Promotions and rewards should reach consumers at the moment decisions are being made, not after the fact. Retailers must reduce the effort required to access savings and make loyalty benefits feel automatic, visible, and immediate.

4 Guide Better Decisions

More than half of consumers have failed to find a product and either abandoned the purchase or settled for an alternative. Retailers should help consumers locate products, evaluate options, and discover relevant alternatives throughout the journey.

5 Connect Digital and Physical

The shopping journey increasingly begins online. Retailers should ensure shopping lists, coupons, loyalty benefits, and preferences move seamlessly into the store experience, creating continuity across channels rather than forcing consumers to start over.

6 Personalize in Context

Relevance may produce the smallest gap today, but it represents one of the largest long-term opportunities. Retailers that deliver context-aware offers, recommendations, services, and experiences while consumers are making decisions will help define the next generation of physical retail.

The direction of travel is clear. Consumer expectations, shaped by more than a decade of digital commerce, will continue to rise. The retailers that move first to close these gaps will do more than improve customer satisfaction. They will strengthen loyalty, recover lost revenue, and establish competitive advantages that become increasingly difficult for others to replicate.

ABOUT THIS REPORT

About A2Z Cust2Mate

This report was produced by A2Z Cust2Mate, a retail technology company focused on transforming the in-store shopping experience through connected commerce solutions.

A2Z Cust2Mate's Smart Cart platform combines AI, real-time data, and digital in-store capabilities to help retailers deliver more seamless, transparent, personalized, and connected shopping journeys, bridging the gap between evolving consumer expectations and the physical store experience.

The Survey

The findings presented in this report are based on an original consumer survey conducted in May 2026 among 1,600 adult consumers across the United States, Italy, and France.

The study was commissioned by A2Z Cust2Mate and fielded by PollFish using its in-app survey methodology, which reaches respondents through mobile apps and digital environments they already use.

To participate, respondents were required to:

- be 18 years of age or older,
- regularly shop in physical supermarkets,
- and have experience shopping online.

This ensured the research reflects the perspectives of digitally active consumers who engage in both physical and online retail. The majority of respondents reported visiting supermarkets at least once per week.

What We Measured

The survey examined six dimensions of the modern in-store shopping experience:

Seamless | Transparent | Rewarding | Guiding | Continuous | Relevant

These expectations were originally identified in Cust2Mate's white paper, When Online Expectations Enter the Physical Store.

For each expectation, respondents were asked:

1. how important the experience is to them.
2. how well their primary supermarket currently delivers it.

Both questions used a 7-point scale ranging from 1 ("not at all important / not at all well delivered") to 7 ("extremely important / extremely well delivered").

How to Read the Numbers

Unless otherwise stated, all percentages represent respondents who selected the highest ratings on the scale (6 or 7 out of 7).

The Expectation Gap is the difference between:

- the percentage of consumers who rate an expectation as highly important, and
- the percentage who believe supermarkets currently deliver it well.

Larger gaps indicate areas where consumer expectations most significantly exceed current in-store experiences.

Data Analysis

Results were analyzed both in aggregate and across key demographic and geographic segments.

Where differences were meaningful, findings were segmented by:

- generation: Gen Z (ages 18-29), Millenials (ages 30-45), and Boomers (ages above 46)], and
- geography (United States vs. Europe).

Segment-level findings are highlighted throughout the report where they add meaningful context to the overall results.

APPENDIX: THE QUESTIONS BEHIND EACH EXPECTATION

Seamless – fast, frictionless shopping

- Importance: How important is it for your in-store shopping experience to be fast and hassle-free (e.g., finding items quickly, avoiding long lines, and smooth checkout)?
- Experience: How often do you shop in a supermarket without encountering difficulties (e.g., checkout delays, finding items, waiting in line)?

Transparent – clear pricing and running totals

- Importance: How important is it to clearly see prices, discounts, and your running total to help manage your spending while shopping?
- Experience: How easy is it to understand product prices and discounts and keep track of your total spending while shopping in a supermarket?

Rewarding – timely access to discounts and promotions

- Importance: How important is it to avoid missing discounts, promotions, and rewards while shopping?
- Experience: How often do you receive discounts, promotions, or rewards at the right time to use them while shopping in a supermarket?

Guiding – finding products and information

- Importance: How important is it that you can easily find products in a supermarket and access helpful information (e.g., ingredients, alternatives, reviews)?
- Experience: How easy is it today to find products in a supermarket and get the information you need to make a decision?

Continuous – connecting online activity to in-store

- Importance: How important is it that your online shopping activity (e.g., saved lists, digital coupons, loyalty rewards) is available in-store?
- Experience: How well do supermarkets currently connect your online activity (e.g., lists, coupons, loyalty rewards) with your in-store experience?

Relevant – personalized offers and suggestions

- Importance: How important is it to receive personalized offers or suggestions while shopping, based on your cart, preferences, or location in the store?
- Experience: How well do supermarkets currently provide personalized offers or suggestions while you shop, based on your preferences, cart, or in-store location?