



CROSS-SHOPPING BEHAVIORS

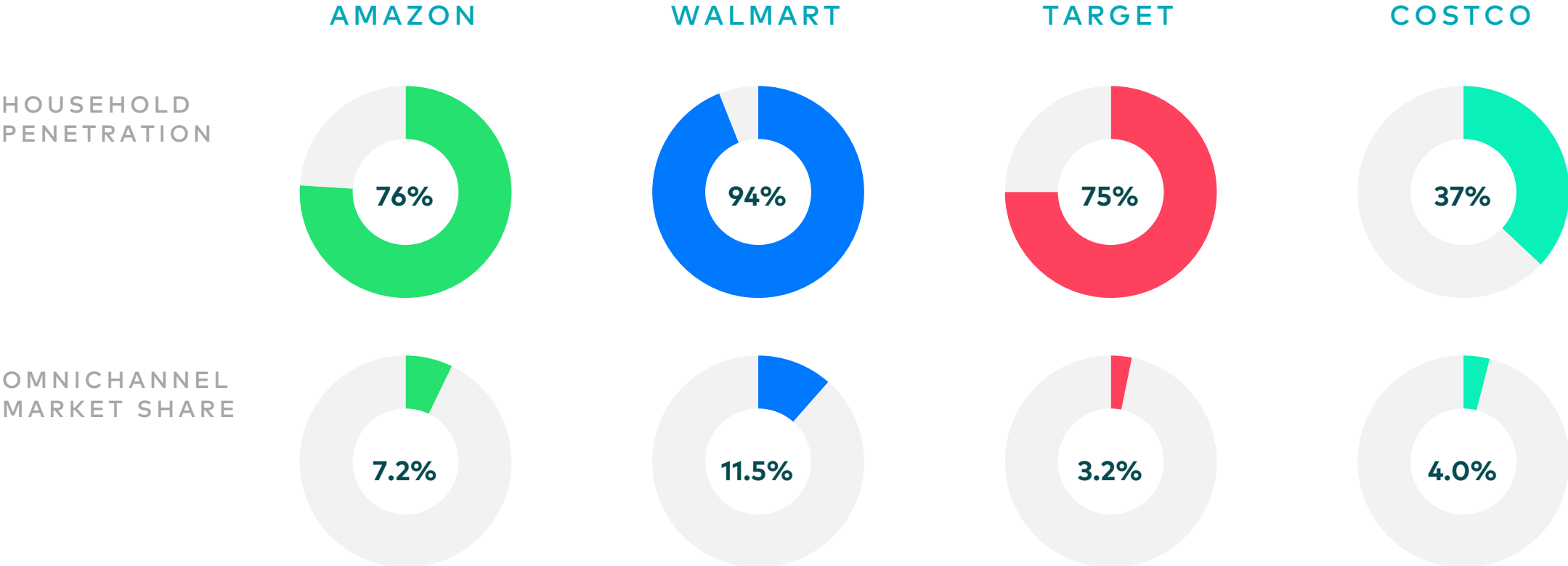
Who **turns to clicks** just after leaving the bricks?

Numerator's cross-shopping analysis quantifies the effect of showrooming—when consumers visit a brick-and-mortar store and then buy online. The study highlights the dynamic relationship between in-store and online shopping, focusing on four of the largest retailers in the United States: Amazon, Walmart, Target & Costco. When consumers walk out of a brick-and-mortar location, how many turn to Amazon within a day to supplement their trip?



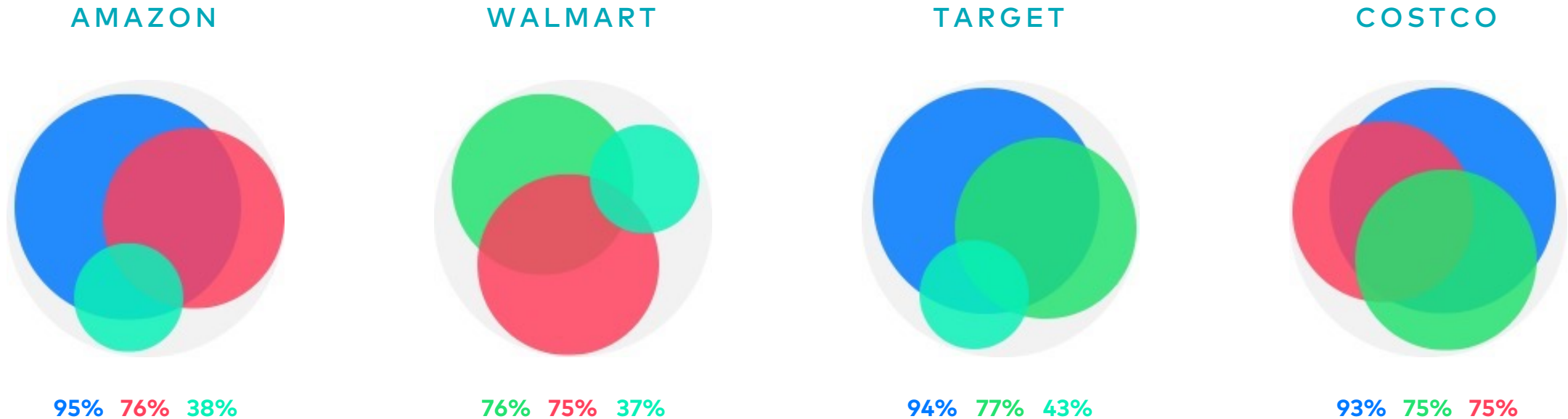
The big four, but make it retail.

Together, four of the largest retailers in the United States– Amazon, Walmart, Target and Costco– serve **99.7%** of all US households and account for **26%** of cross-category, omnichannel sales dollars.



Few consumers are entirely loyal to a single retailer.

Nearly all consumers shop across multiple stores, including the nation's largest retailers. Over **90%** of Target shoppers also shop at Walmart, and **86%** of Costco shoppers shop at Target. Crossover with Amazon is similar across Walmart, Target and Costco, with roughly three-fourths of each retailer's shoppers making purchases at Amazon, as well.

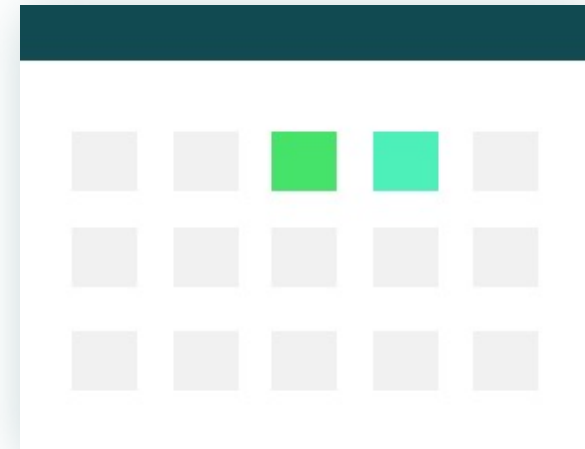


PERCENT OF RETAILER'S SHOPPERS WHO ALSO SHOP AT AMAZON, WALMART, TARGET OR COSTCO

WITHIN-A-DAY SHOPPING

Amazon is primed & capturing leaked trips.

Many consumers shop at multiple retailers, and some do so within the same day. For this analysis, we examined individuals who shopped in-store at a brick-and-mortar location and then supplemented with an Amazon order *within the same day or the day immediately following*. We focused on the first nine months of 2021 to avoid any holiday-specific shopping swings.

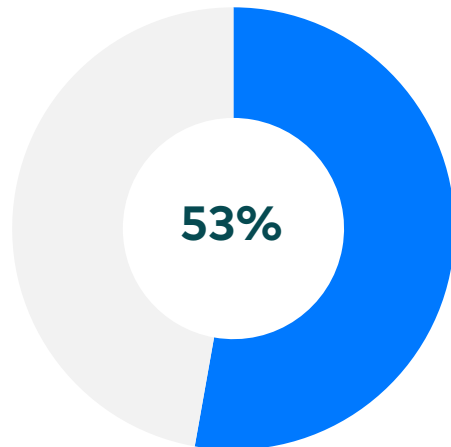


How common is this behavior?

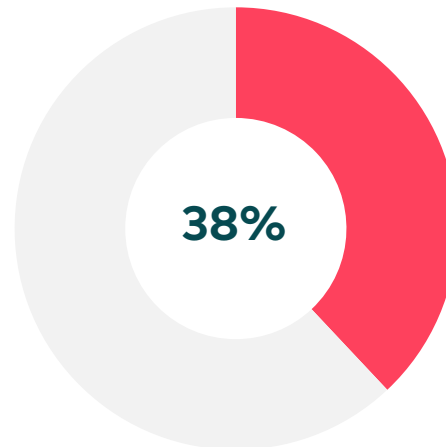
In the first nine months of 2021, over half (**53%**) of Walmart shoppers made an Amazon purchase within a day of shopping in-store at Walmart – this number was closer to two-fifths (**38%**) for Target and Costco shoppers.

PERCENT OF RETAILER'S SHOPPERS HAVE PLACED AN AMAZON ORDER WITHIN A DAY OF SHOPPING IN-STORE

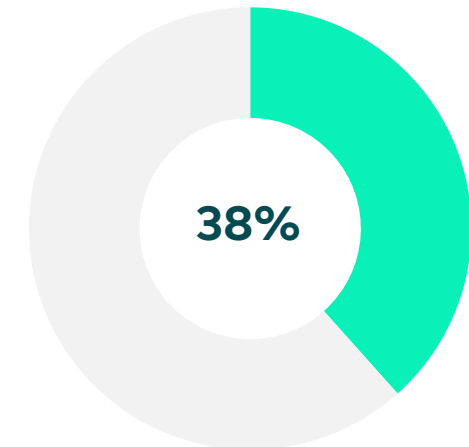
WALMART



TARGET



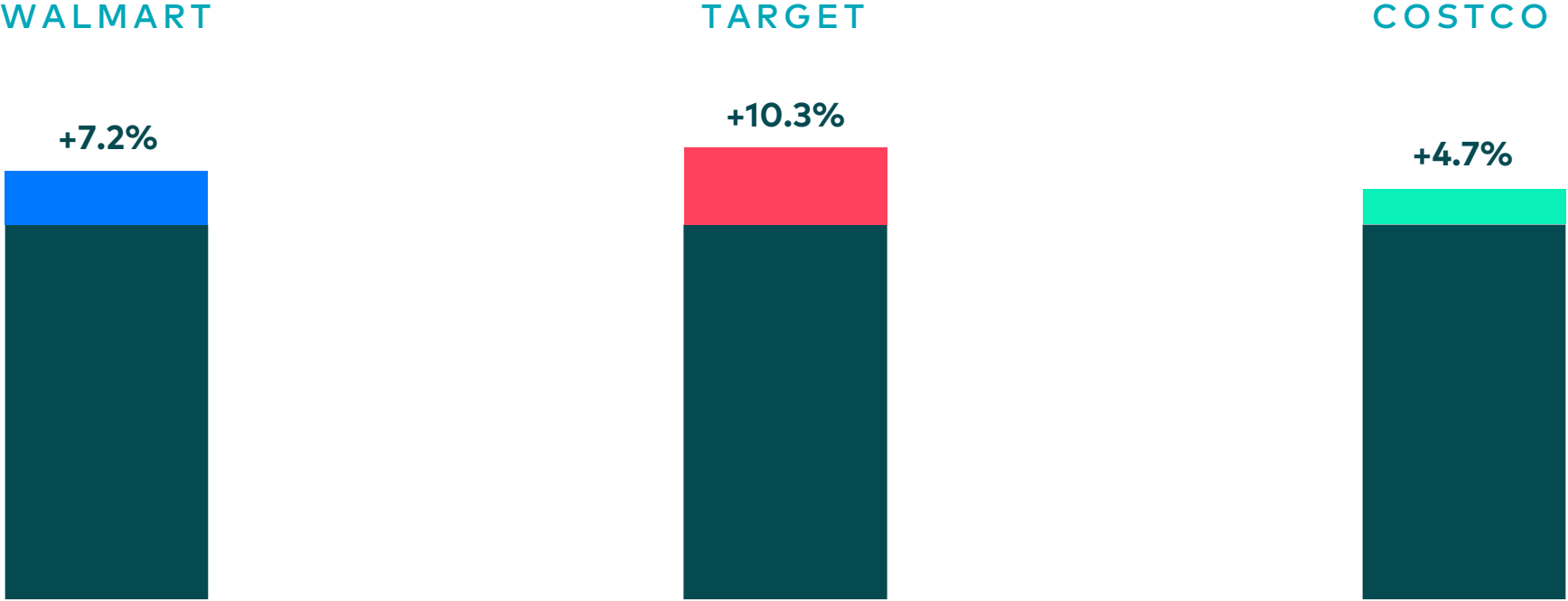
COSTCO



Leaked trips mean leaked dollars.

Each retailer analyzed has the opportunity for increased dollar sales if they capture these "within-a-day" purchases while consumers are still in their store. Despite leaking fewer households compared to Walmart, Target's leaked households are spending more on Amazon, giving Target the largest sales opportunity (+10.3%) from preventing leaked trips & dollars.

SALES OPPORTUNITY FROM LEAKED WITHIN-A-DAY TRIPS

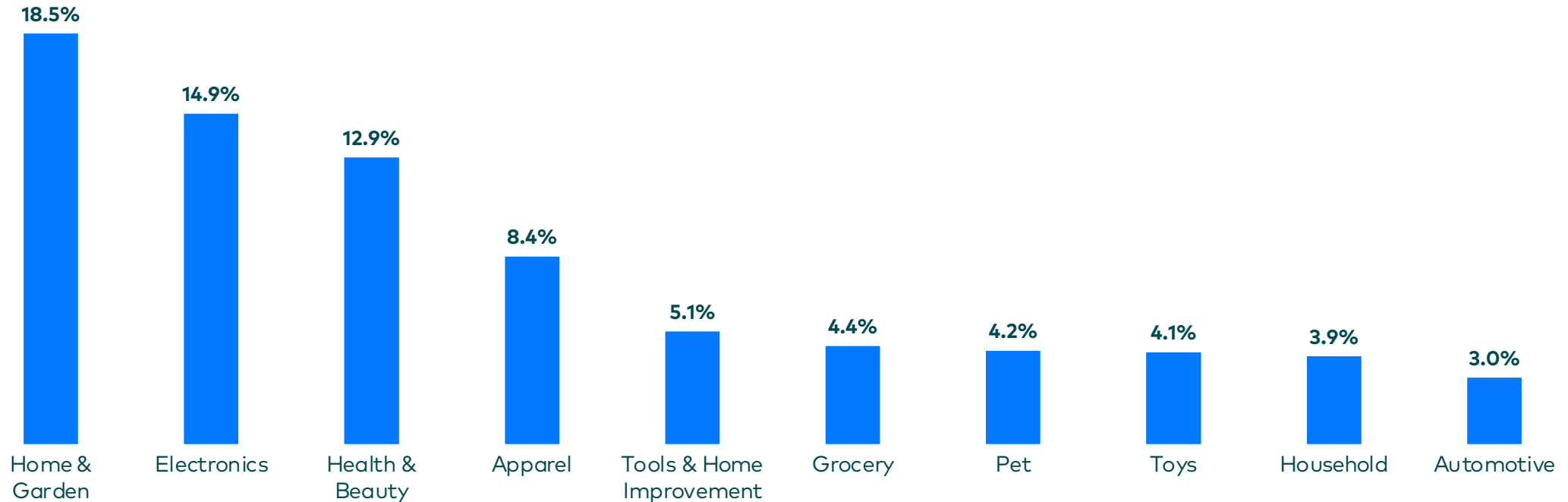


Numerator Insights Q1-3 2021 (01/01/21 – 9/30/21)
Sales Opp: Dollar sales made on Amazon within-a-day of shopping in-store at retailer divided by retailer's total sales in the same period

Walmart top leaked departments

Almost one-fifth of dollars spent on Amazon within a day of a Walmart trip are in the Home & Garden sector, followed by Electronics, Health & Beauty, and Apparel. Together, these top four leaked categories account for over half of Walmart's within-a-day leakage.

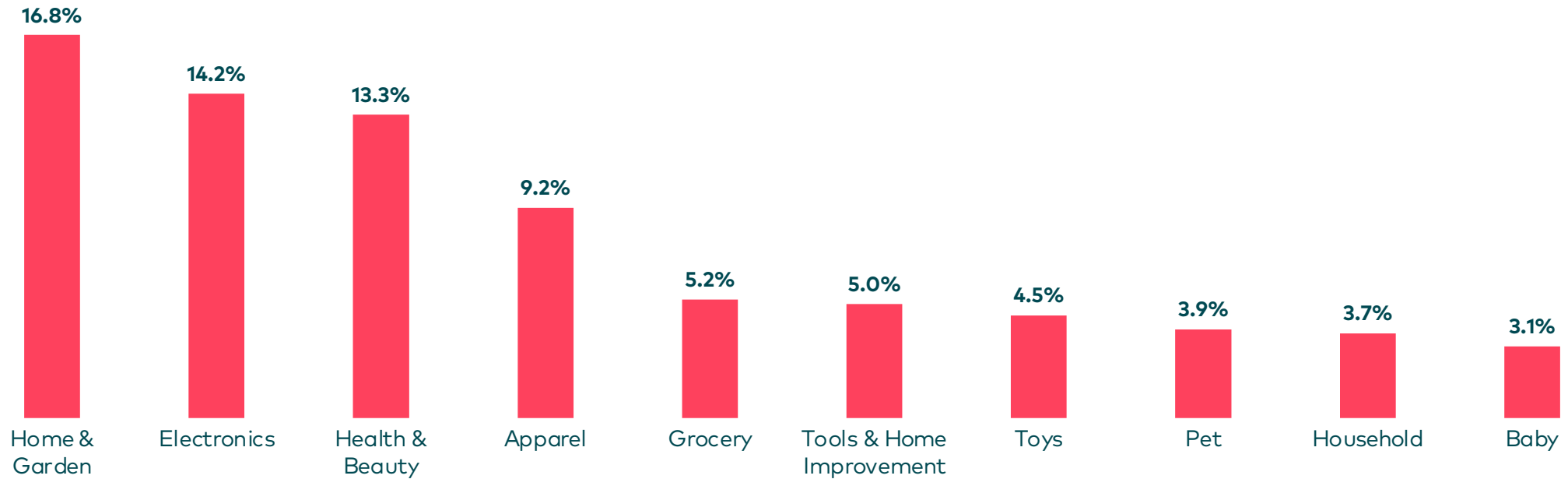
TOP LEAKED DEPARTMENTS (% of leaked dollars)



Target top leaked departments

One-sixth of dollars spent on Amazon within a day of a Target trip are in the Home & Garden sector, followed by Electronics, Health & Beauty, Apparel and Grocery. Target is the only retailer analyzed with Grocery in its top five within-a-day leaked categories.

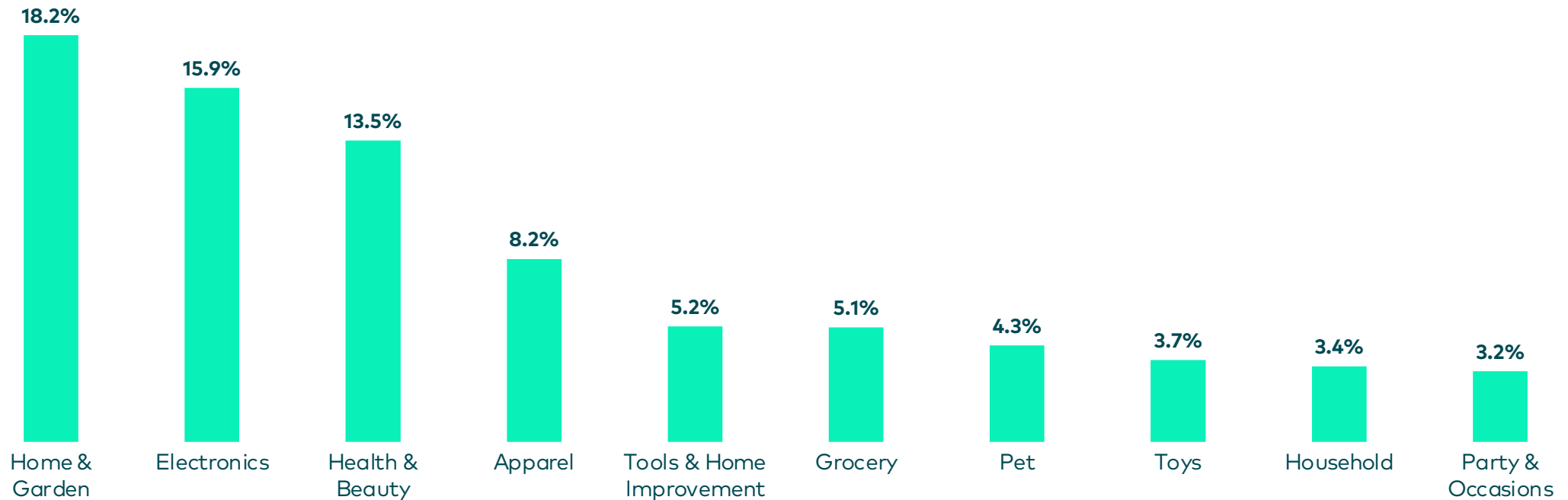
TOP LEAKED DEPARTMENTS (% of leaked dollars)



Costco top leaked departments

Almost one-fifth of dollars spent on Amazon within a day of a Costco trip are in the Home & Garden sector, followed by Electronics, Health & Beauty, Apparel and Tools & Home Improvement. Within-a-day leakage from Costco closely mirrors that of Walmart.

TOP LEAKED DEPARTMENTS (% of leaked dollars)





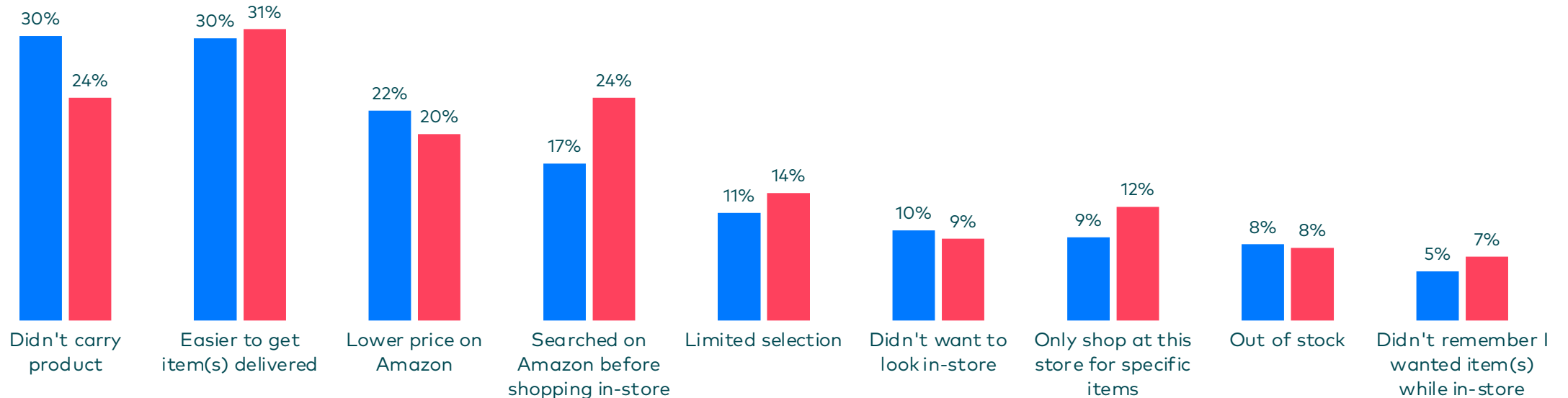
Shoppers had a lot to say about their within-a-day leaked trips.

We surveyed shoppers who made an Amazon purchase within a day of shopping in-store at either Target or Walmart. They shared their reasons for purchasing at Amazon instead of buying when they were in-store.

They chose Amazon for numerous reasons.

Product availability and ease of delivery were top reasons cited for buying on Amazon after shopping in-store. Walmart shoppers were slightly more likely to cite lower prices a reason for buying on Amazon, while Target shoppers were more likely check Amazon prior to shopping in-store.

WHY DID YOU PURCHASE YOUR ITEMS FROM AMAZON INSTEAD OF PURCHASING THEM WHILE AT WALMART / TARGET



Numerator custom survey, n= 804 Walmart and 207 Target shoppers who made purchase on Amazon within a day of shopping in-store at given retailer

Retailers need different strategies for capturing leakage.

For Target, capturing these leaked trips primarily comes down to lowering their prices or offering discounts. Walmart shoppers had elevated desires for better product availability, improved in-store experiences, and higher quality products.

WHAT CAN WALMART / TARGET DO TO BECOME THE RETAILER YOU VISIT FOR MORE OF YOUR PURCHASES?



Numerator custom survey, n= 804 Walmart and 207 Target shoppers who made purchase on Amazon within a day of shopping in-store at given retailer

Want to **know more** about omnichannel consumer behavior?

Drop us a line or visit our website for the latest research.



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