



MYTHBUSTERS

DE-AVERAGING THE CONSUMER

What is convenience?

MYTHBUSTERS

~~**Myth: Convenience is a universal metric.**~~

Truth: Convenience means different things to different shoppers.

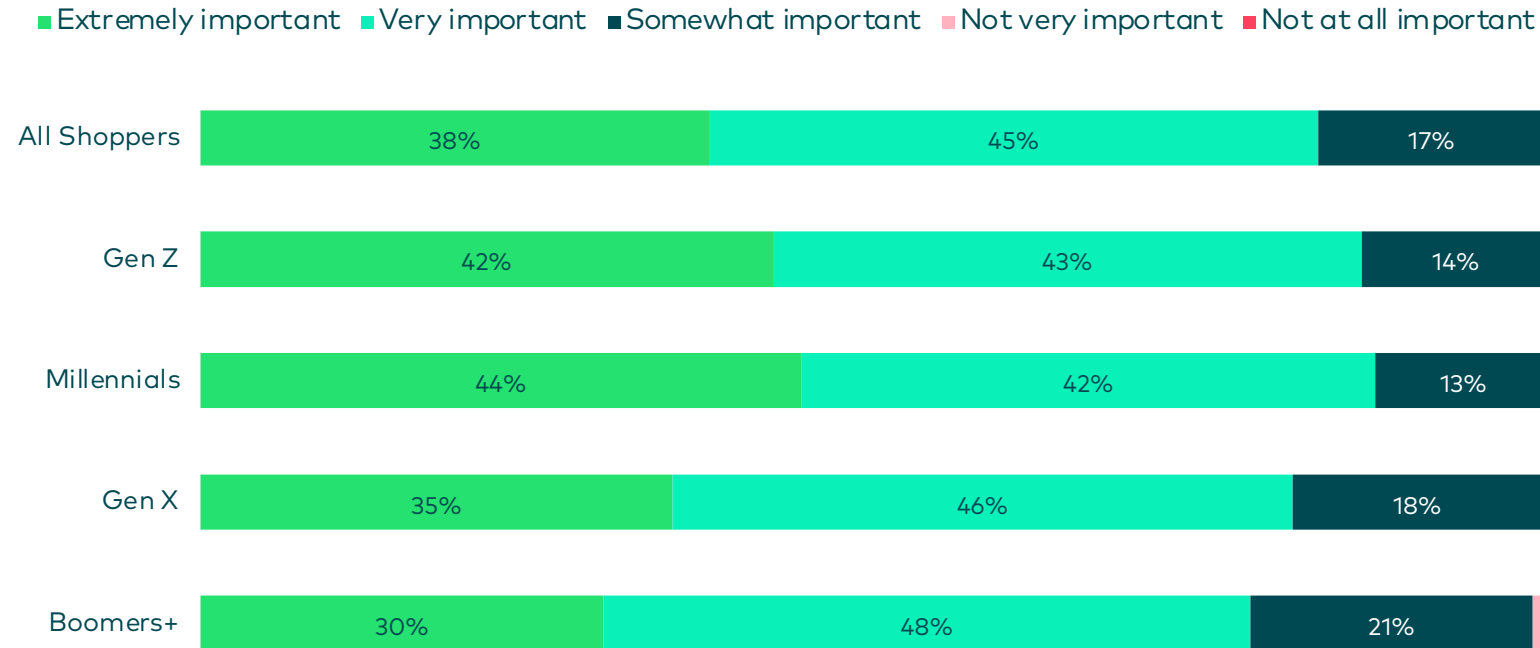
Location, timing, product availability and physical effort are all elements that play into what consumers define as a “convenient shopping experience.” But views on convenience differ based on product type and shopping method, as well as between shopper groups—particularly different generations. While averages can be useful for high-level snapshots, a real understanding of convenience can only be achieved by taking a more nuanced view.

Most people say convenience is highly important to them when shopping.

Overall, 82% of shoppers say convenience is extremely or very important— for Millennials, this number rises to 87%, which is 10 points higher than Baby Boomers, who care the least about convenience compared to other generations. When ranked alongside other shopping considerations, convenience comes in at #3, behind price and quality; this holds true across all generational segments.

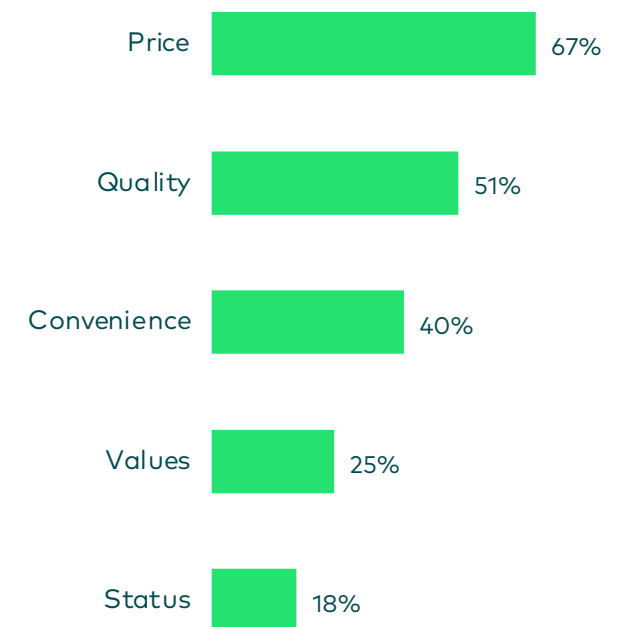
IMPORTANCE OF CONVENIENCE

"How important is convenience to you when shopping?"



DECISION FACTORS RANKED

% of shoppers ranking factor #1 or #2*



Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | *Rank the following factors in order of importance when you are making a shopping decision.

But shoppers don't have a singular view on what convenience means.

While some shoppers prefer a one-stop-shop with everything they need, others say convenience to them is avoiding a big box store and big crowds. Consistent themes emerge like proximity to home, "quick" and "easy" experiences, and not having to deal with out-of-stocks. A number of shoppers also mention the ability to order online for pickup or home delivery, particularly those with children.

DEFINING CONVENIENCE

"What does convenience mean to you?"



"Close to home, can buy a **variety of things in one place.**"

"**Being able to order online** and pick up at store or [get] free delivery."

"Having a store close to me in which the **layout is familiar to me so I can find things quickly.**"

"**Quick and easy shopping.** Great if it can get delivered to me for free."

"Something I can grab quickly and close to the house and **not have to make a trip to a big chain store.**"

"**Pickup / delivery options** so that my 3 kids under 3 can stay in car or at home."

"Convenience is **quick, readily available, easy to access.** On my way... just needing [to be] picked up."

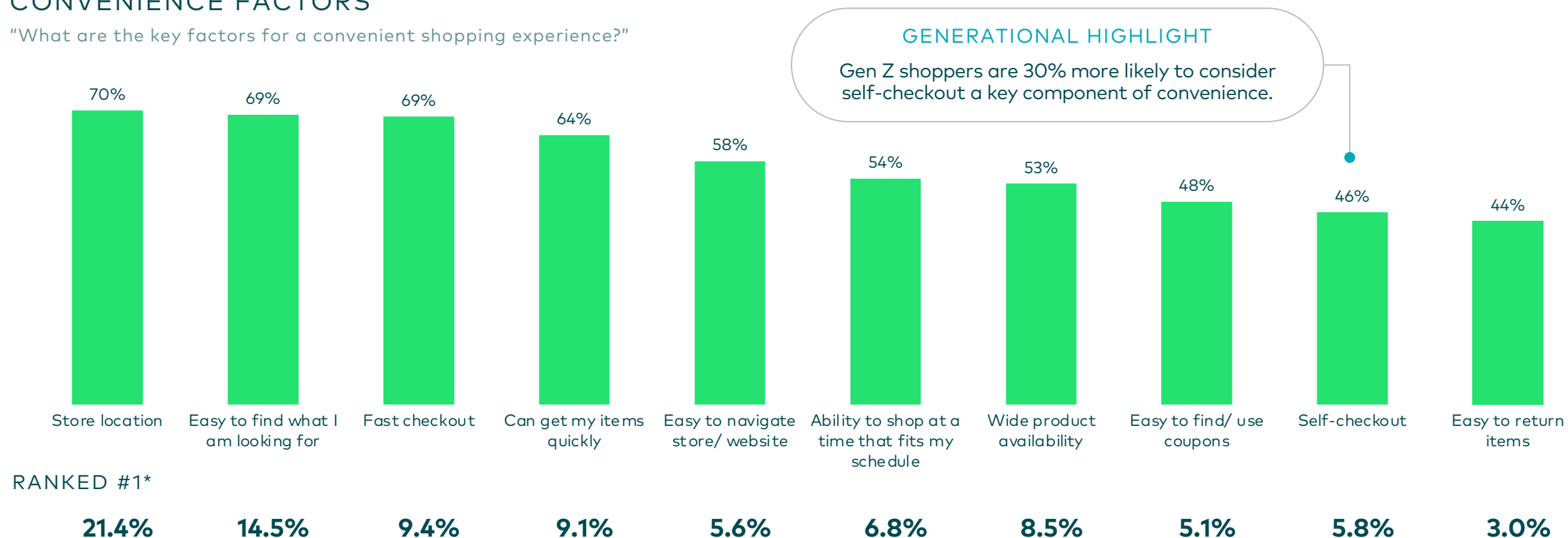
"Being able to walk in, purchase and **leave within like 10 minutes.**"

Location, ease, and a fast checkout are the top components to convenience.

One-in-five shoppers say store location is the #1 factor of convenience, with an additional half saying it plays a role. But generational differences are also evident in convenience preferences— though fewer than half of consumers overall say self-checkout is important, 60% of Gen Z'ers consider it a key factor of convenience, making them the only generation to place it in their top five.

CONVENIENCE FACTORS

"What are the key factors for a convenient shopping experience?"



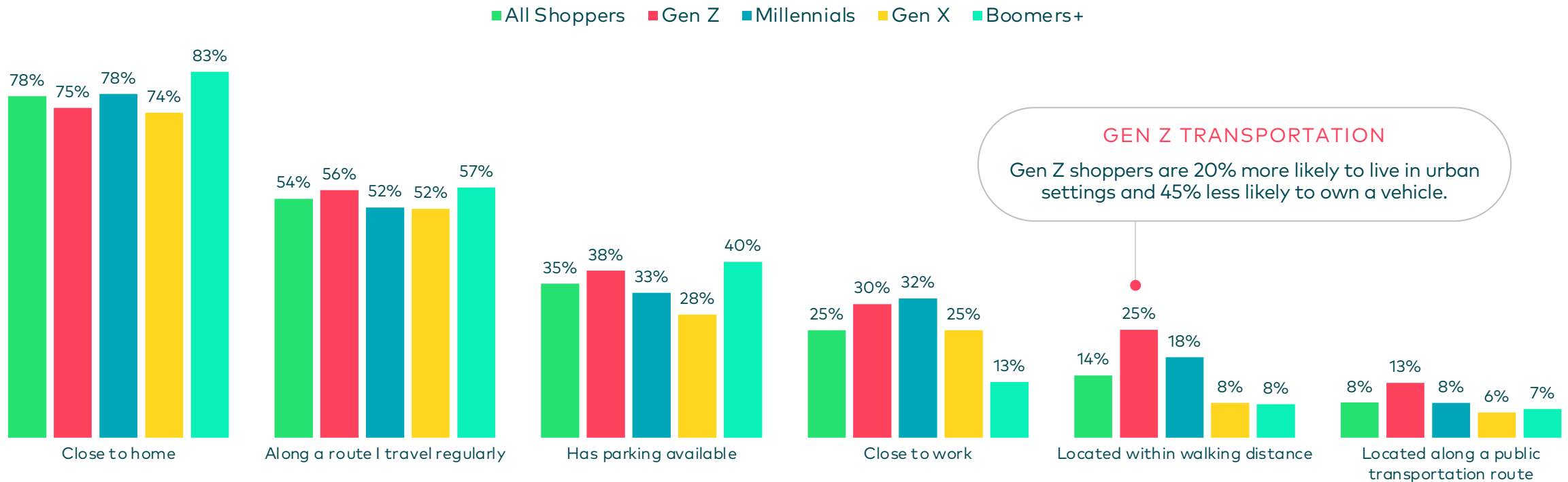
Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | *Based on your selections in the previous question, please rank what you find most important for a convenient shopping experience.

Proximity to home is the most important aspect of a convenient location.

Over three-fourths of consumers consider the most convenient store location one that is close to home, followed by one along a route they travel regularly. Younger shoppers place more emphasis on stores within walking distance or located along a public transportation route.

LOCATION PREFERENCES

"Which of the following are important to you when selecting a convenient store location?"

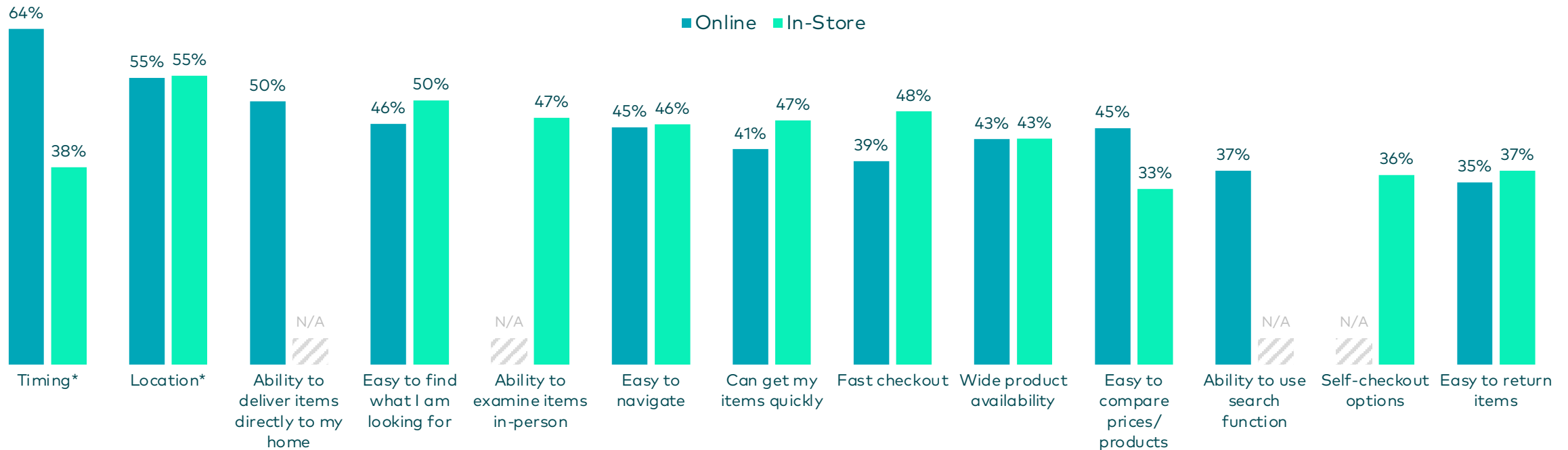


Convenience factors differ when we look at in-store vs. online shopping.

While store location is the top in-store convenience factor, ability to "shop at any time" is the #1 factor online shoppers cite when it comes to convenience, followed by the ability to "shop from anywhere." Speed is slightly more relevant for in-store shopping, while easy comparison between products and prices plays into online convenience.

CONVENIENCE FACTORS COMPARED

"What makes an [online/in-store] shopping experience convenient?"



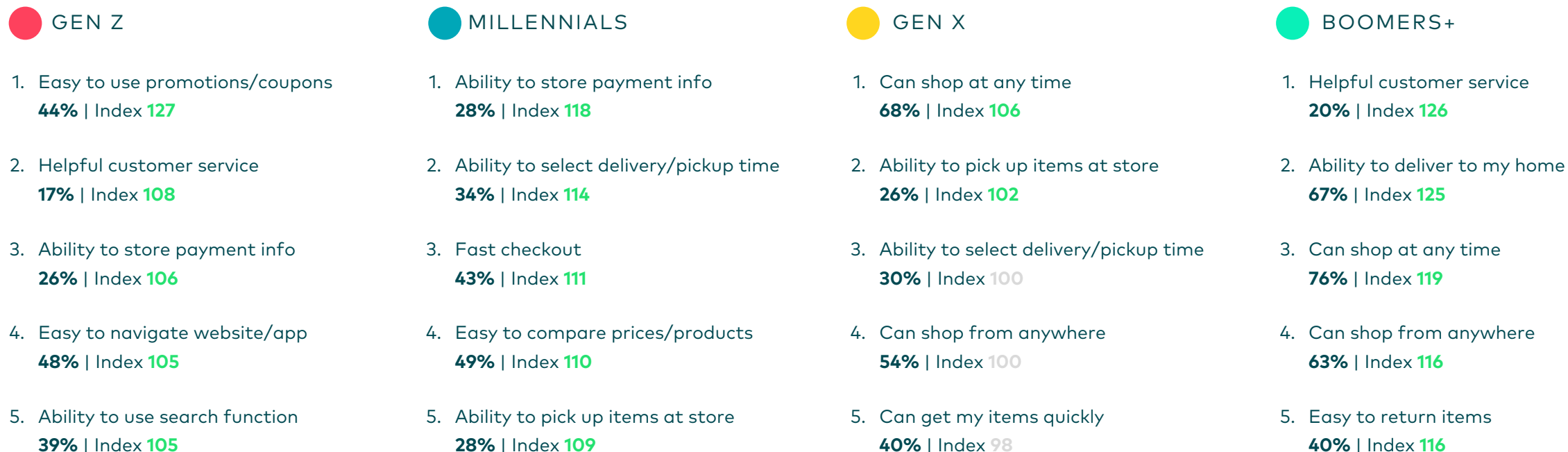
Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | *Timing = "can shop at any time" online and "ability to shop at a time that fits my schedule" in-store | *Location = "can shop from anywhere" online and "store location" in-store

And factors differ even further when broken out by generation.

Gen Z shoppers are more likely to find online shopping convenient because they're able to use promotional codes or coupons easily, something often included with social media ads or influencer marketing. Meanwhile, Millennials and Gen X turn to online for timing flexibility and delivery or pickup options. Boomers find customer service and home delivery the most convenient aspects of online shopping.

ONLINE CONVENIENCE x GENERATION

% of generation | indexed vs. average



Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | What makes online shopping experience convenient?

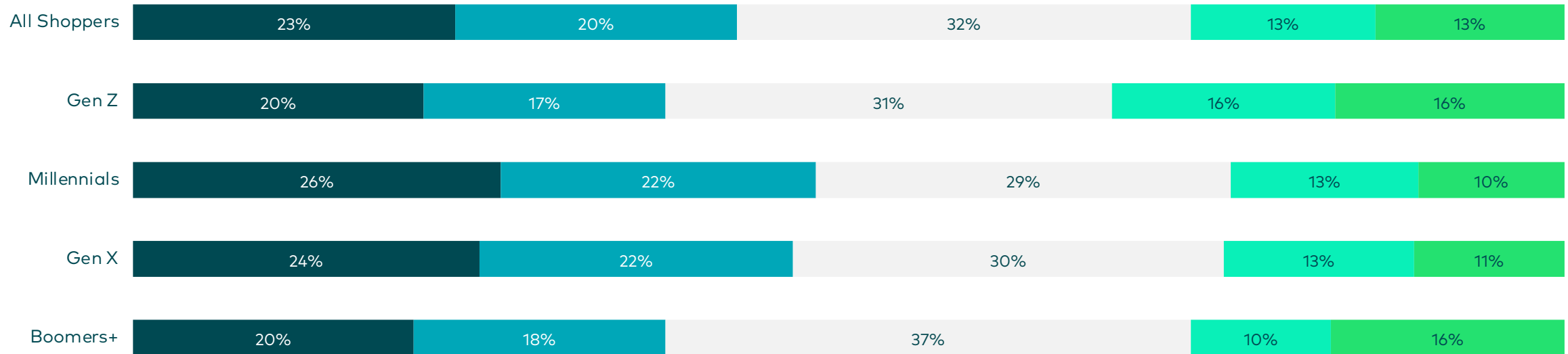
Overall, consumers find online ordering more convenient than shopping in-store.

Millennials are the most likely to favor online shopping, followed by Gen X. Though they still show a slight preference for online, Gen Z'ers are more likely than any other generation to find in-store shopping more convenient. When asked about the convenience of both methods, over half (52%) of consumers said online shopping was extremely convenient, compared to a third (34%) of in-store shoppers.

IN-STORE VS. ONLINE CONVENIENCE

"In general, do you find online shopping or in-store shopping more convenient?"

- I find online shopping much more convenient
- I find online shopping somewhat more convenient
- I find online and in-store shopping equally convenient
- I find in-store shopping somewhat more convenient
- I find in-store shopping much more convenient



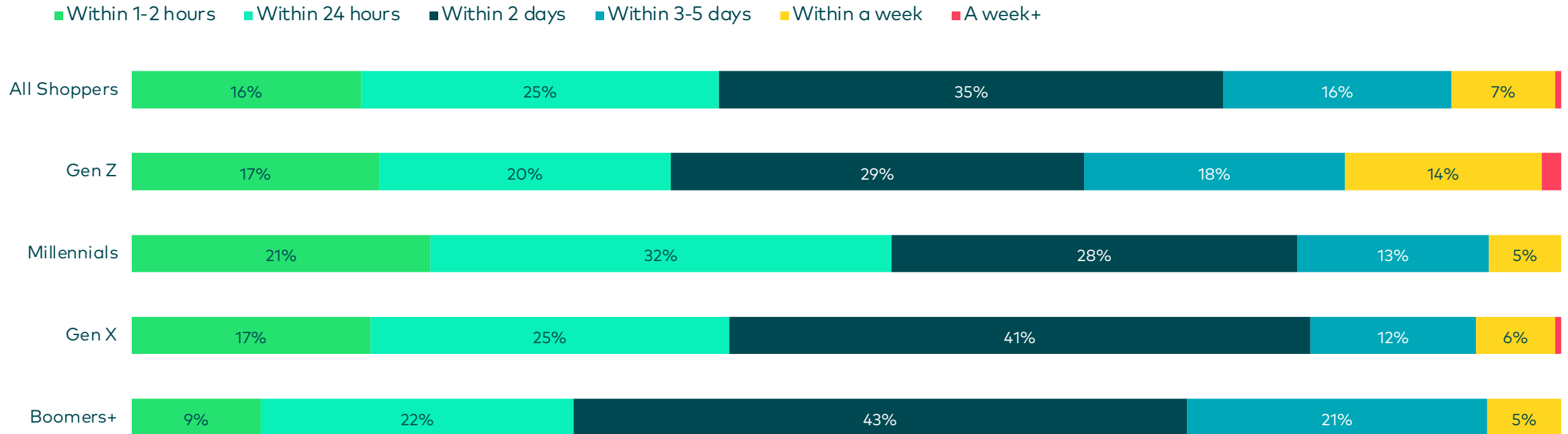
Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | Includes only those who shop both online & in-store
"How convenient do you generally find [in-store/online] shopping methods?" (cited in text, not charted)

Most online shoppers prefer to receive their items within two days of ordering.

Among the handful of shoppers who said they find online shopping inconvenient, two of the top reasons were unreliable or slow delivery. When asked about preferred delivery speed, over half of Millennials wanted their items in 24 hours or less, while Gen Z shoppers were in the least rush to get their items— Gen Z'ers were twice as likely to say delivery "within a week" was fine with them.

DELIVERY SPEED PREFERENCES

"When shopping online, how quickly would you prefer to receive your items?"



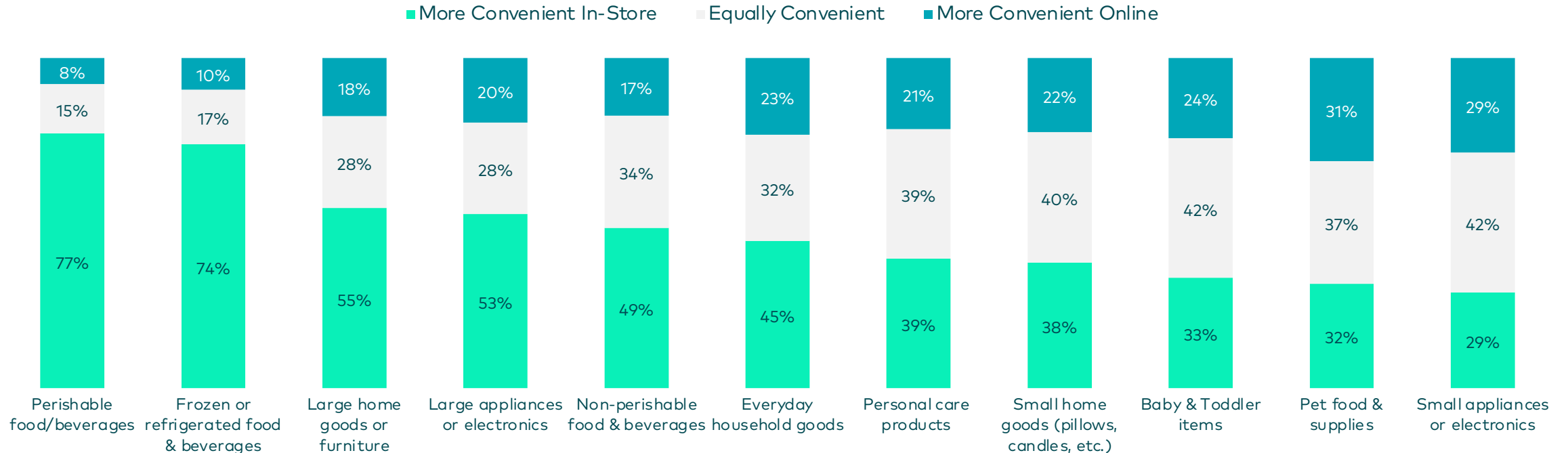
Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | Limited to shoppers who say they use this method

Shoppers continue to find in-store shopping more convenient for certain items.

Three-fourths of consumers said they think it's more convenient to buy perishable or frozen grocery items in store, as well as large items like furniture or appliances. Meanwhile, small appliances or electronics are seen as the most convenient to buy online, as well as basics like pet, baby, and everyday household items— all products consumers are likely to buy at a regular cadence.

CATEGORY CONVENIENCE IN-STORE VS. ONLINE

"For each of the following categories, do you find it to be more convenient to shop in-store or online?"



Source: Numerator Convenience Survey 03/14/23 (n=1,045, equally distributed across generations) | *Excludes those who say they don't purchase given category



MYTHBUSTERS

What does convenience mean to your buyers?

The definition of a "convenient shopping experience" can vary drastically based on who's making the purchase, what they're buying or how they're shopping. Do your buyers generally prefer online or in-store shopping? Do they care more about speed or about low effort? When trying to win with convenience, brands & retailers need to understand which elements of convenience are most important to their buyers.

Reach out to us at hello@numerator.com to learn more.