

BESPOKE SURVEYS

Low-Cost Retailers Vol 27

1,250+ US Consumers, Balanced to Census

Wal-Mart, Target, Dollar Stores, Amazon, etc.



CHECK BREAKDOWN: WMT, TGT, DOLLAR STORES, AMZN

TREND CHECKS

WALMART TRENDS

Consumer engagement has increased slightly for Walmart. Groceries and household items remain the top two categories for Walmart shoppers in our trackers. In terms of spend, self-reported average spend per visit continues to edge higher q/q. Walmart shoppers continue to favor in-store shopping relative to online, though online purchases have gained share over time.

TARGET TRENDS

Self-reported shopping recency has increased somewhat relative to three months ago. By segment, clothing/apparel, household items, and groceries are the top three categories for Target customers. Similar to Walmart trends, average spend per visit continues to grind higher q/q.

PRICING TRENDS

The share of Walmart and Target customers who note higher prices has once again increased with readings for both retailers at all time highs.

DOLLAR STORES

We continue to see a dynamic where dollar stores are picking up some business at the expense of Walmart and Target, but the trend is mixed by dollar store retailer. There is also a growing cohort of those who are shopping Wal-Mart and Target less who say they are just shopping less in general and that they aren't necessarily giving that business to another retailer.

AMAZON

The percentage of Wal-Mart and Target customers who say Amazon negatively impacts their Target/Wal-Mart shopping increased sequentially.

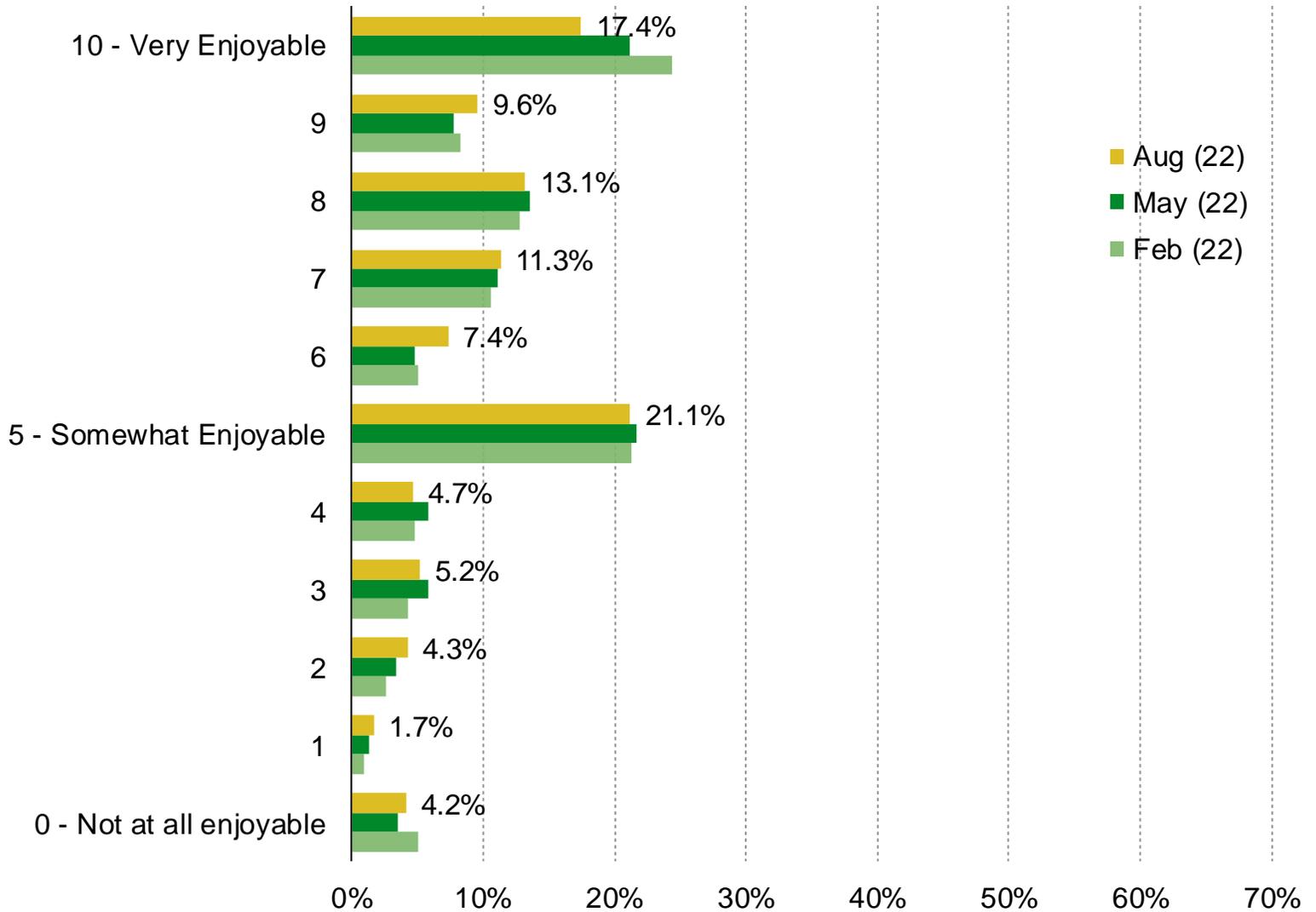
BIG BOX RETAIL AND DOLLAR STORE CATEGORY TREND

Among respondents who said their discretionary spending is lower or much lower, the share who shopped one of the big box retailers or dollar stores in the past month increased to series highs in recent months.

IN-STORE EXPERIENCE

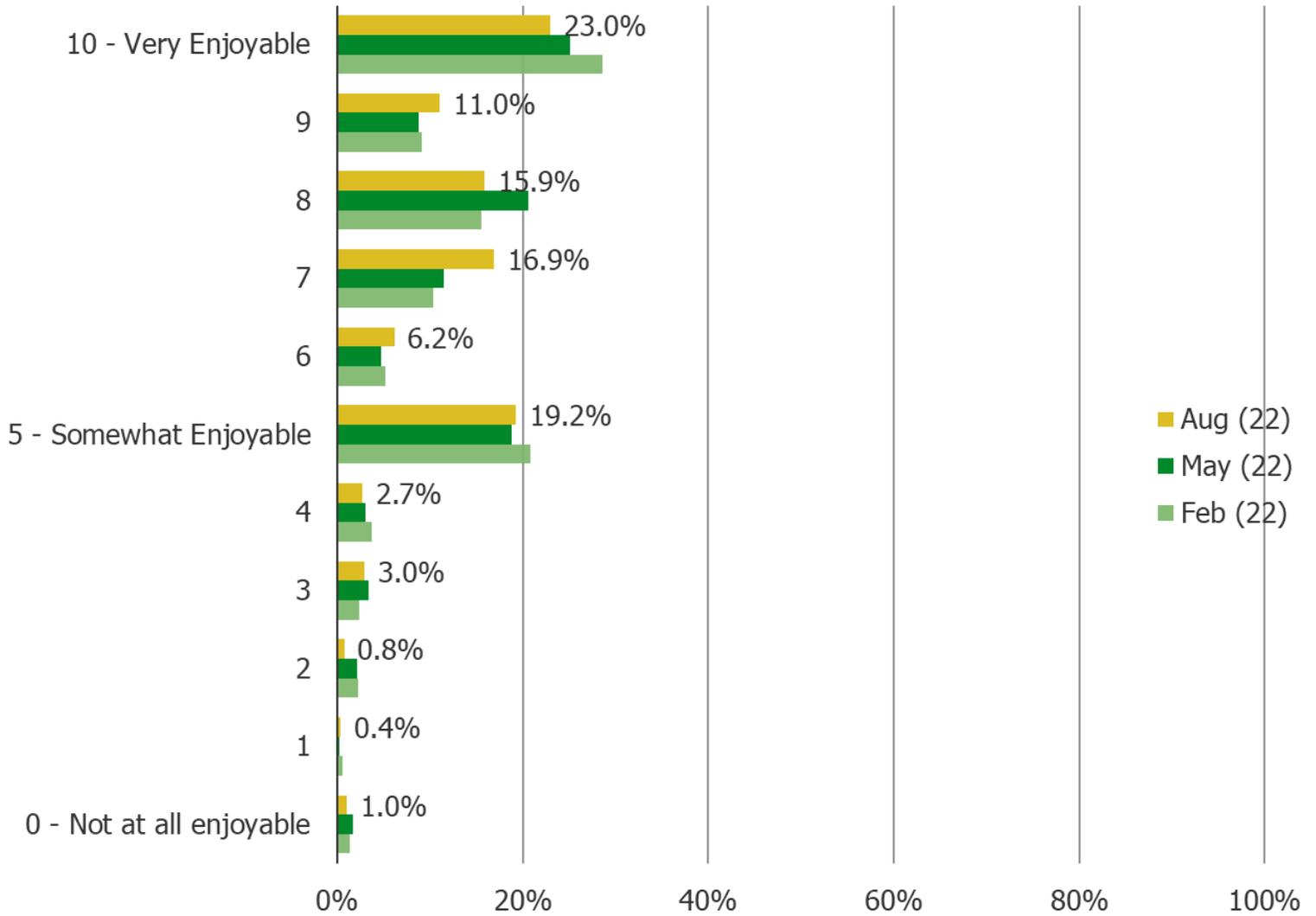
DO YOU FIND IT ENJOYABLE TO VISIT WAL-MART STORES?

This question was posed to all consumers who visit Walmart stores.



DO YOU FIND IT ENJOYABLE TO VISIT TARGET STORES?

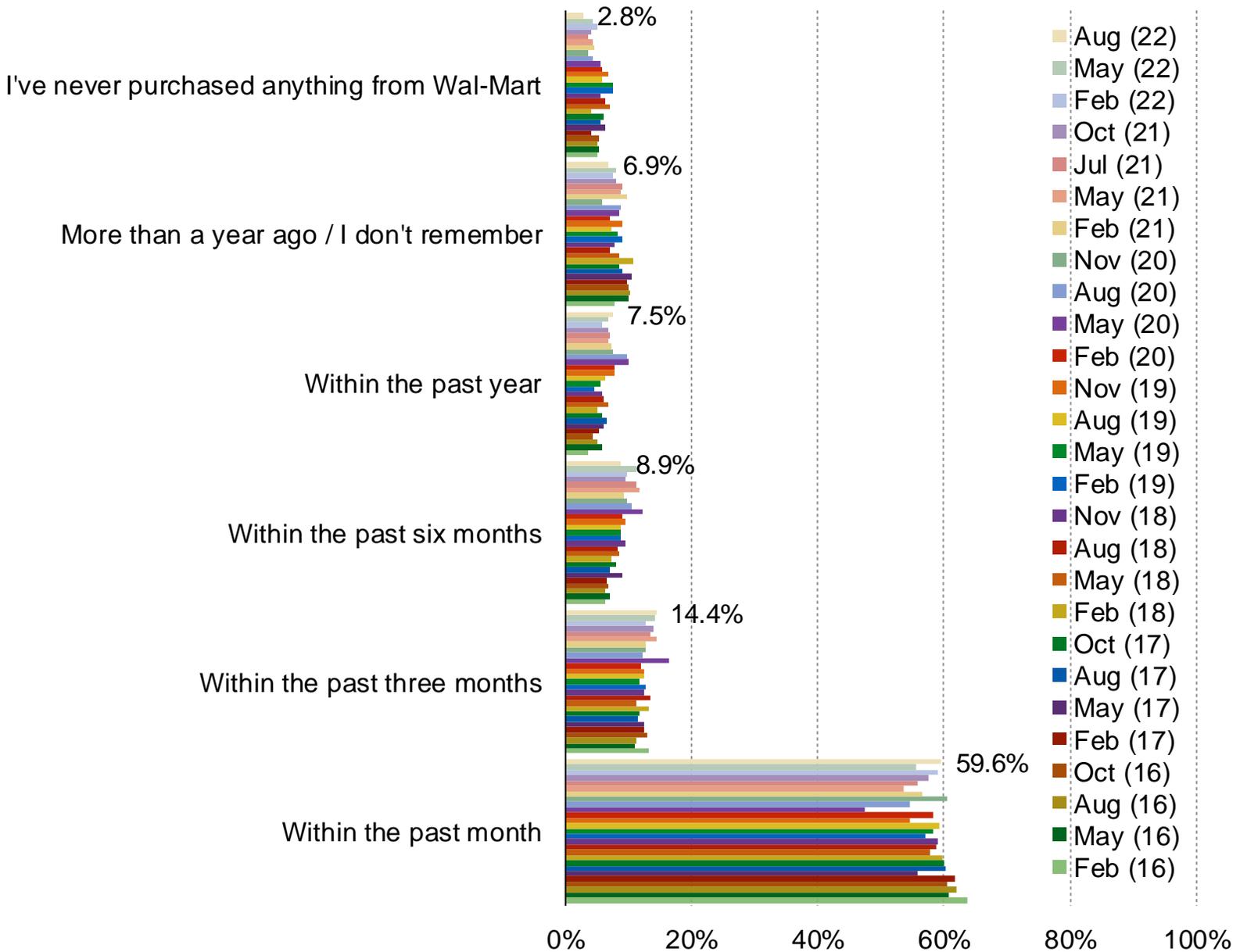
This question was posed to all consumers who visit Target stores.



WAL-MART DEEP DIVE

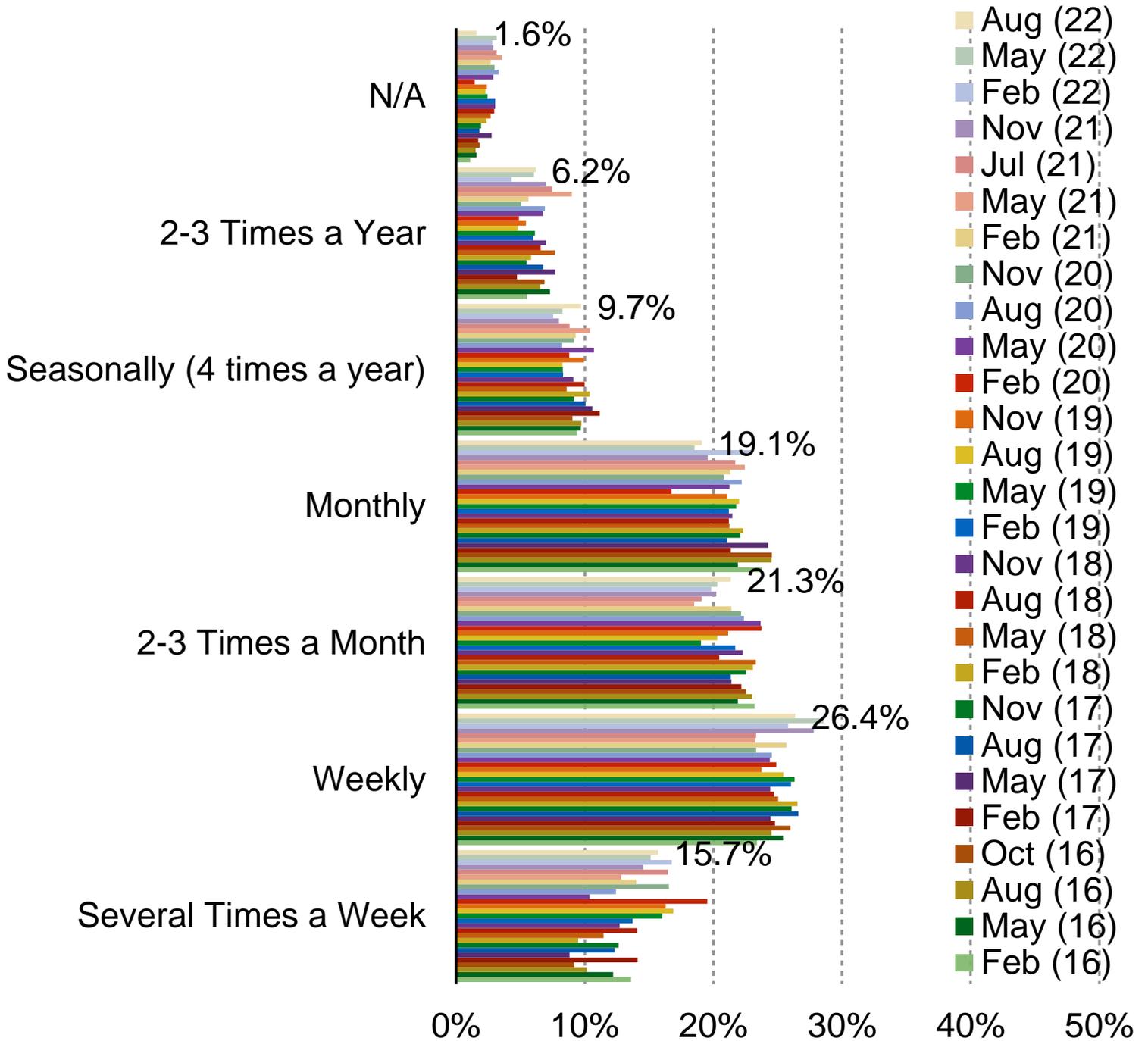
ALL CONSUMERS: LAST TIME PURCHASING FROM WAL-MART

This question was posed to all consumers.



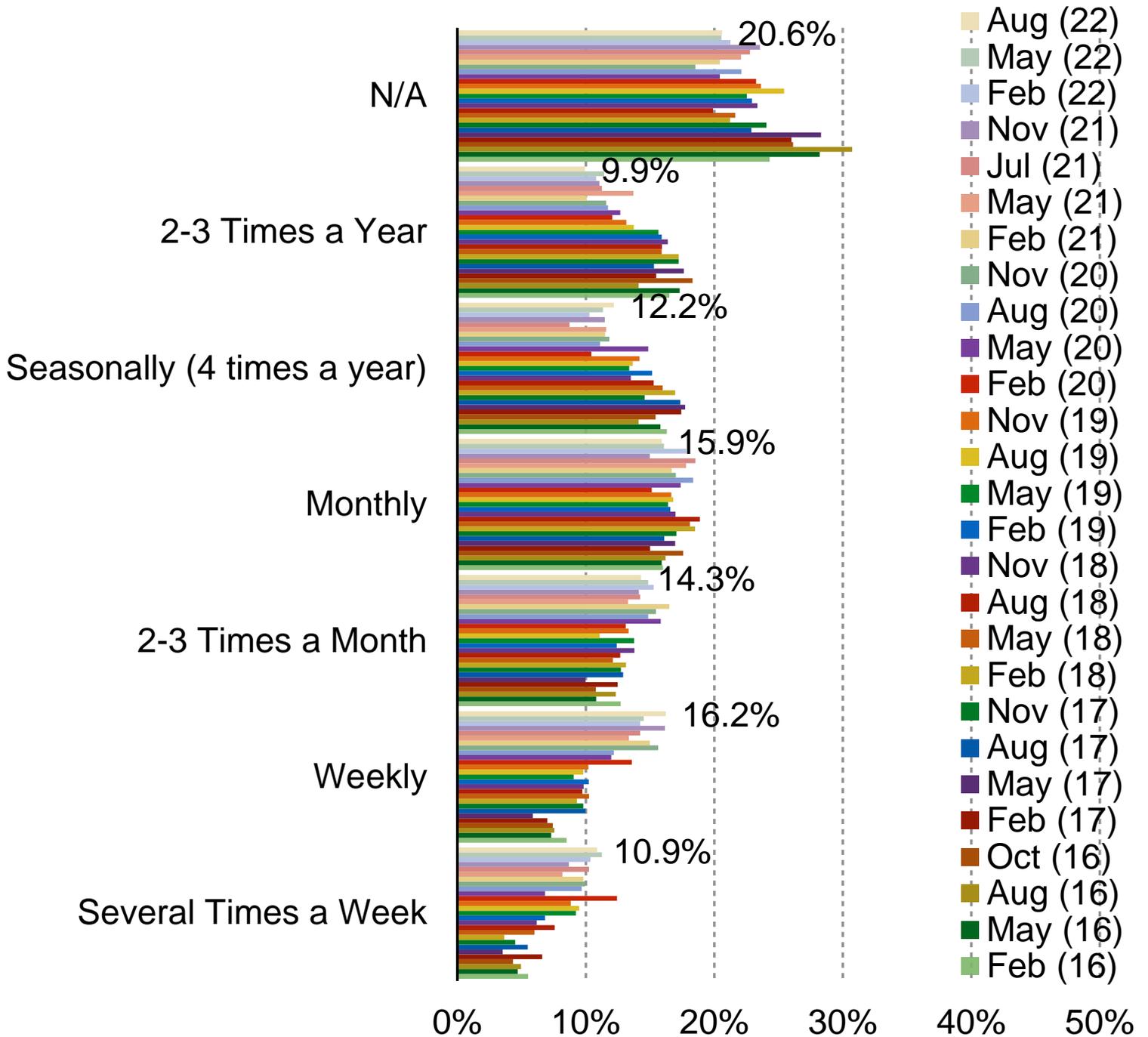
WAL-MART CUSTOMERS: SHOPPING FREQUENCY IN-STORES AT WAL-MART

Posed to respondents who have purchased from Wal-Mart in the past 12 months.



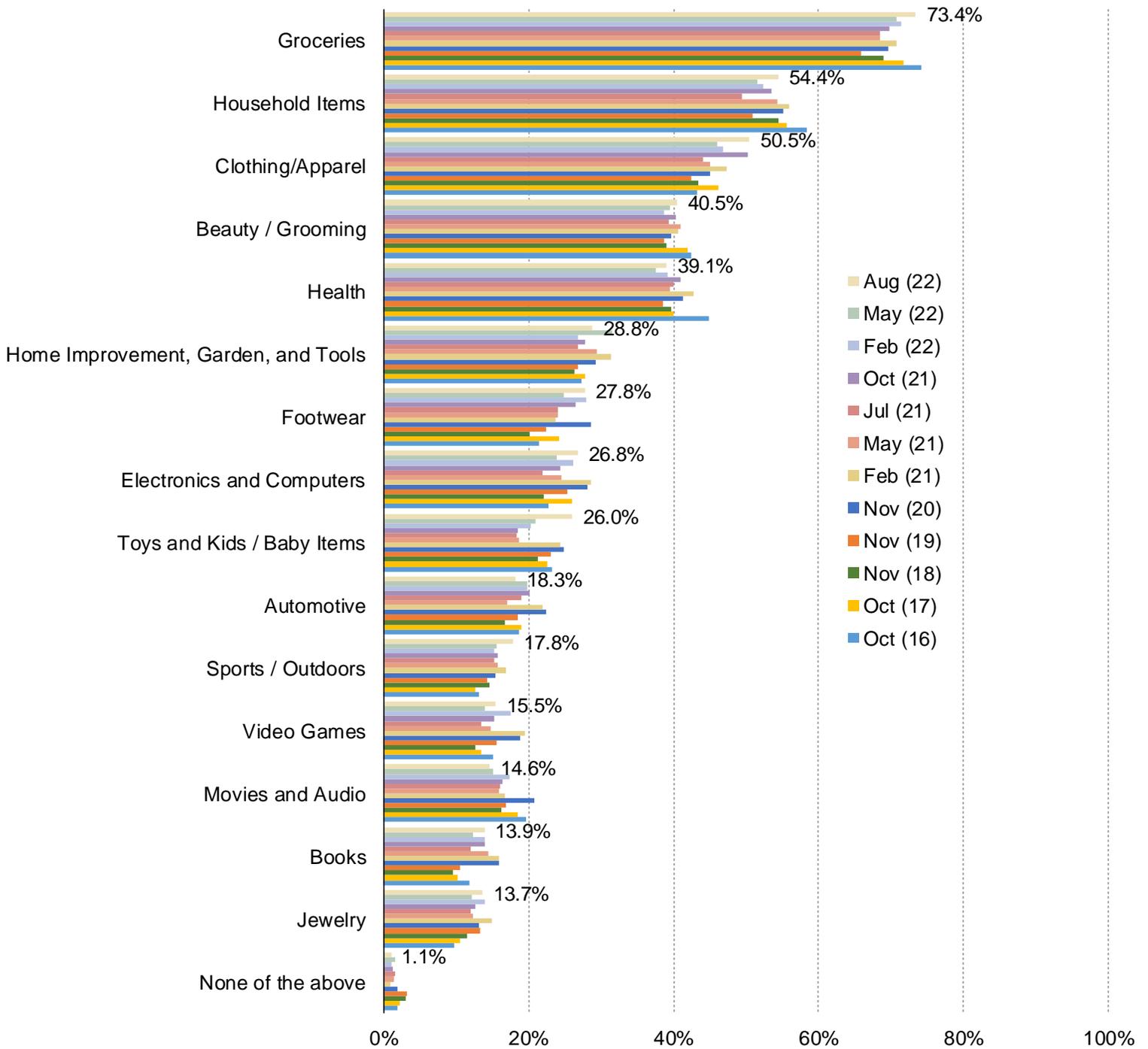
WAL-MART CUSTOMERS: SHOPPING FREQUENCY ONLINE AT WAL-MART

Posed to respondents who have purchased from Wal-Mart in the past 12 months.



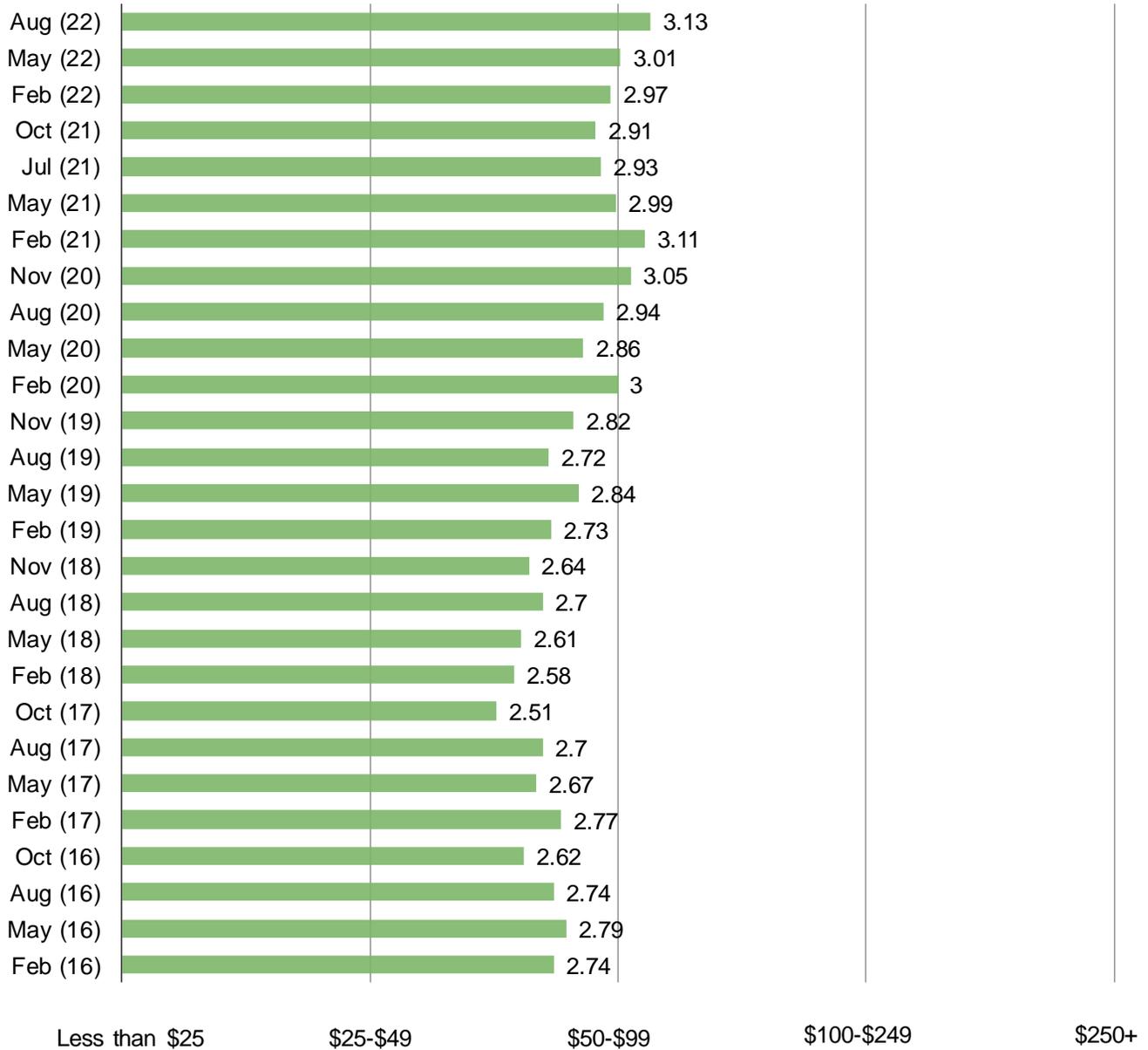
WAL-MART CUSTOMERS: WHAT THEY TYPICALLY BUY FROM WAL-MART (Q/Q TREND)

Posed to respondents who have purchased from Wal-Mart in the past 12 months.



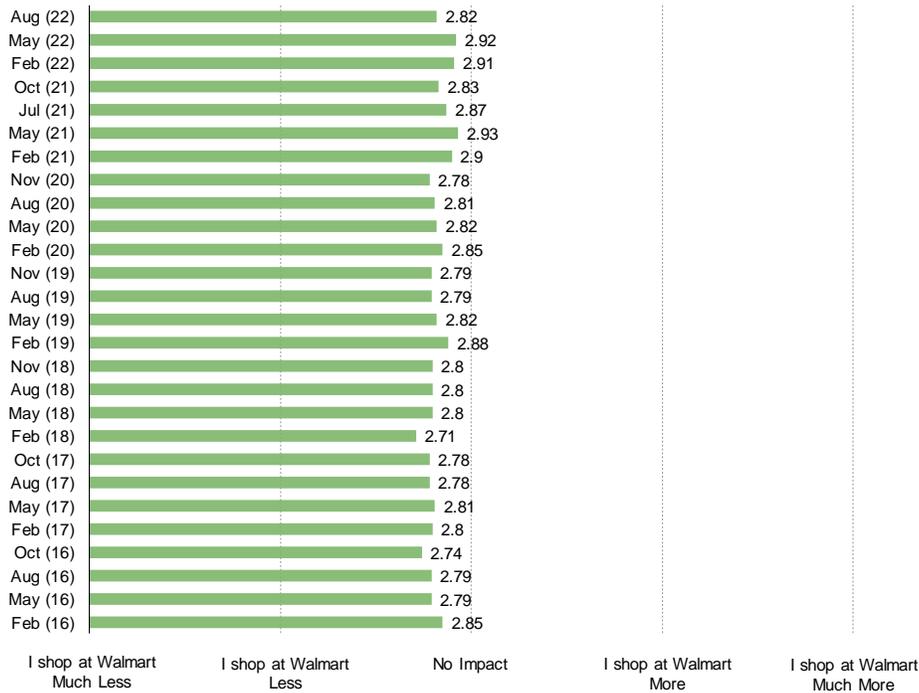
WAL-MART CUSTOMERS: AVERAGE SPEND PER VISIT

Posed to respondents who have purchased from Wal-Mart in the past 12 months.

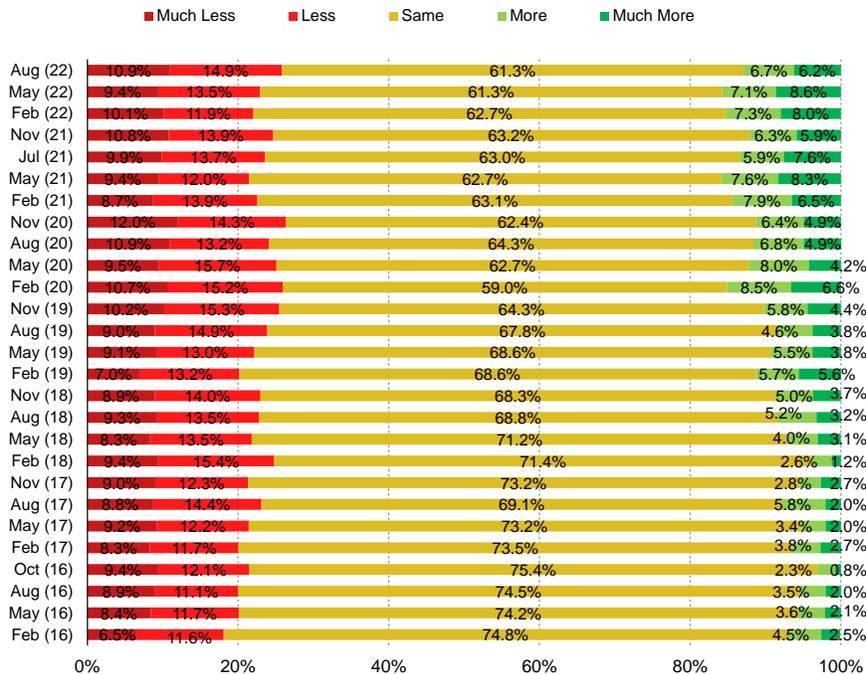


WAL-MART CUSTOMERS: IS AMAZON IMPACTING YOUR SHOPPING AT WAL-MART?

Posed to respondents who have purchased from Wal-Mart in the past 12 months.

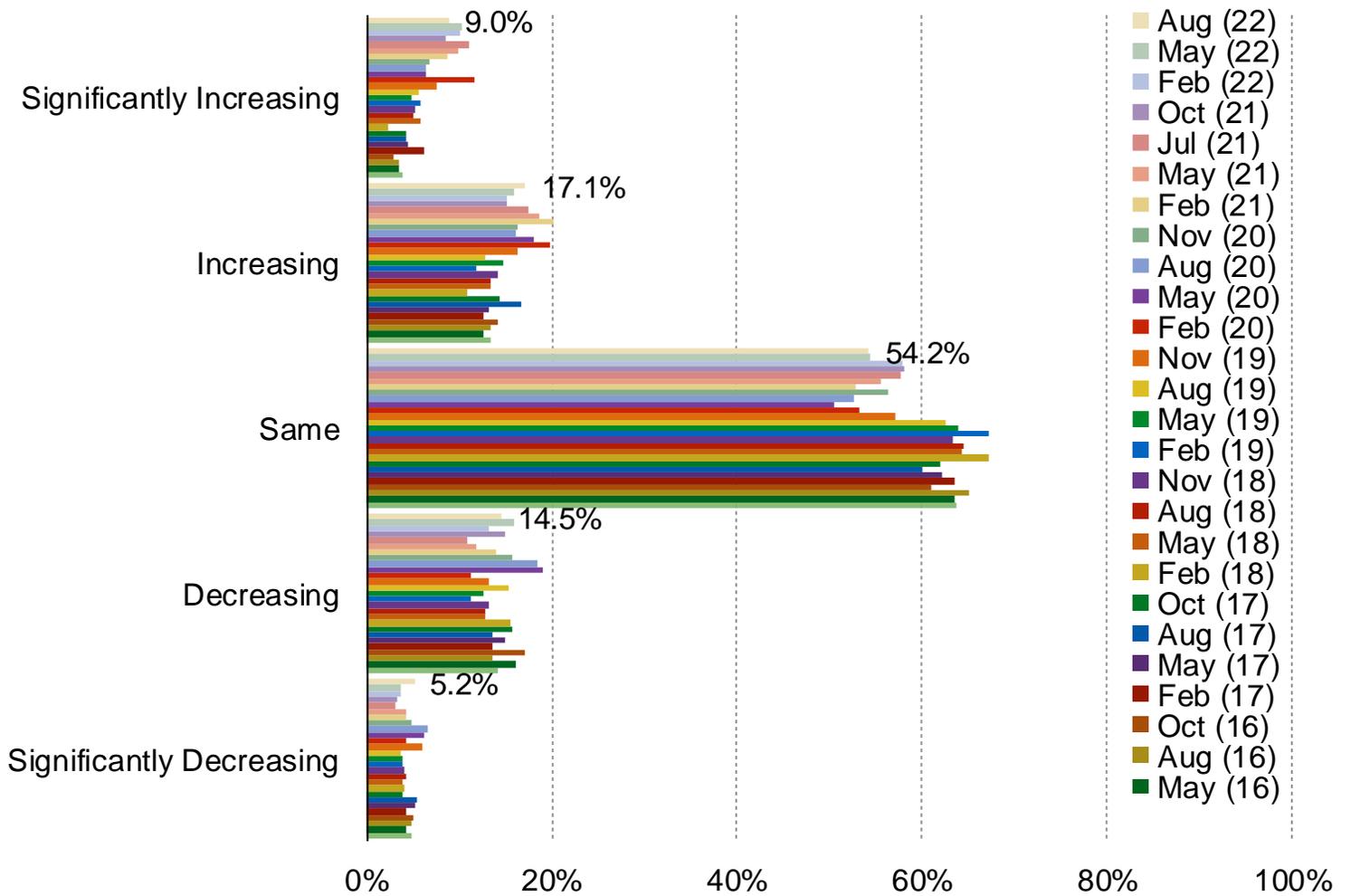


I shop at Walmart Much Less I shop at Walmart Less No Impact I shop at Walmart More I shop at Walmart Much More



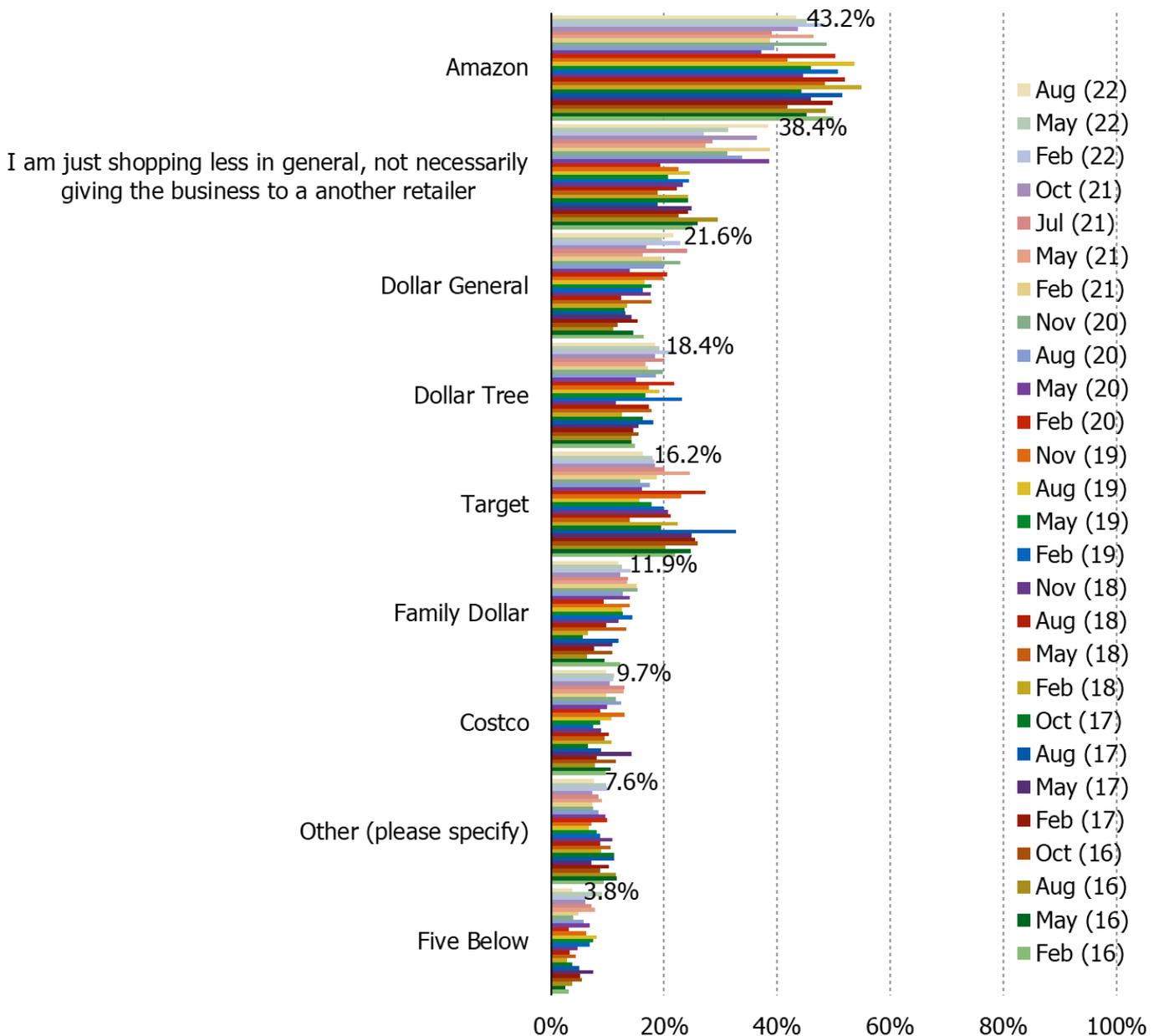
WAL-MART CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY

Posed to respondents who have purchased from Wal-Mart in the past 12 months.



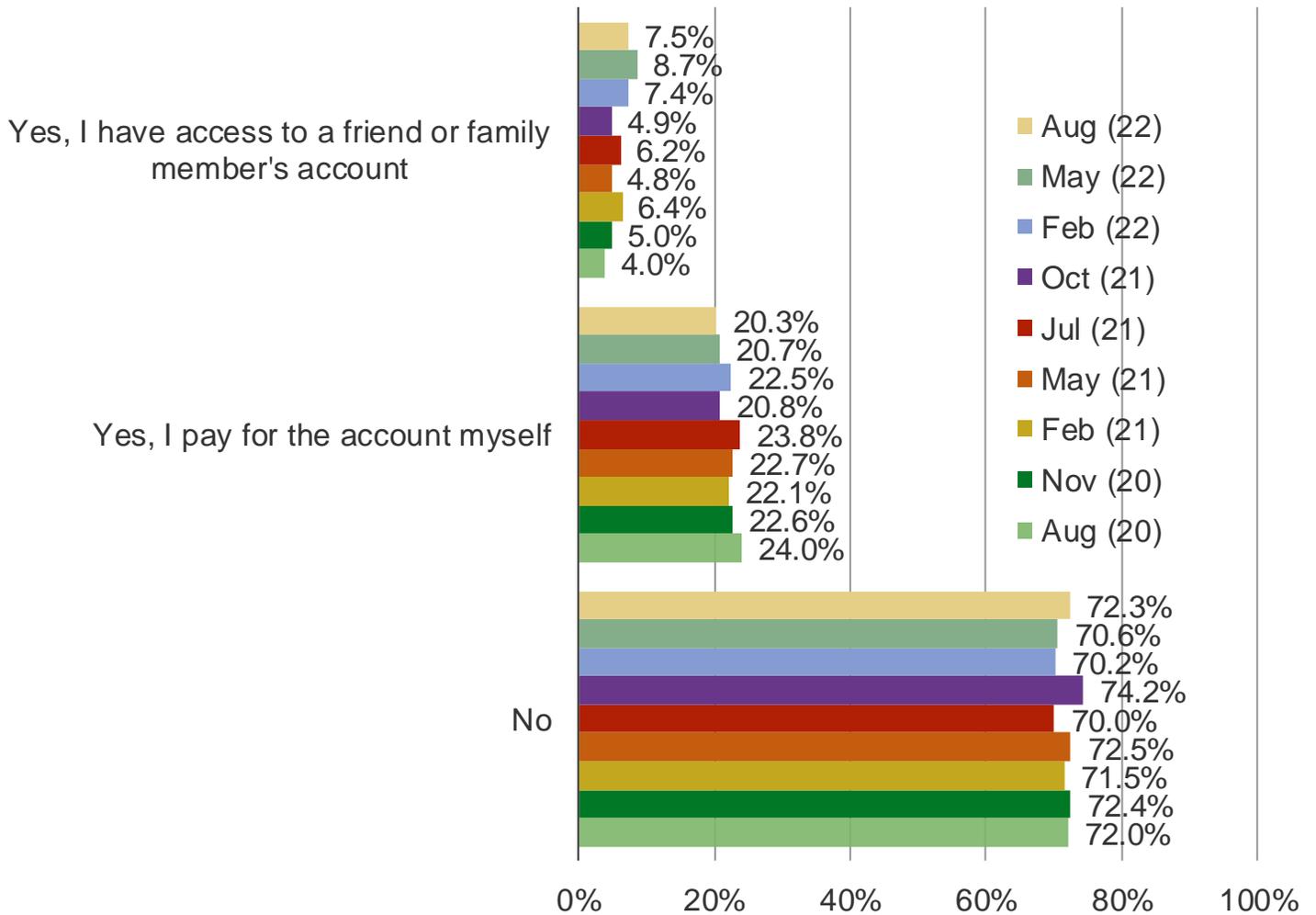
SINCE YOU ARE SHOPPING LESS AT WAL-MART, ARE YOU GIVING THAT BUSINESS TO ANY OF THE FOLLOWING RETAILERS INSTEAD?

Posed to respondents who have purchased from Wal-Mart in the past 12 months AND said they have been shopping Wal-Mart less recently.



DO YOU CURRENTLY HAVE AN ACCOUNT WITH WAL-MART DELIVERY UNLIMITED FOR GROCERIES?

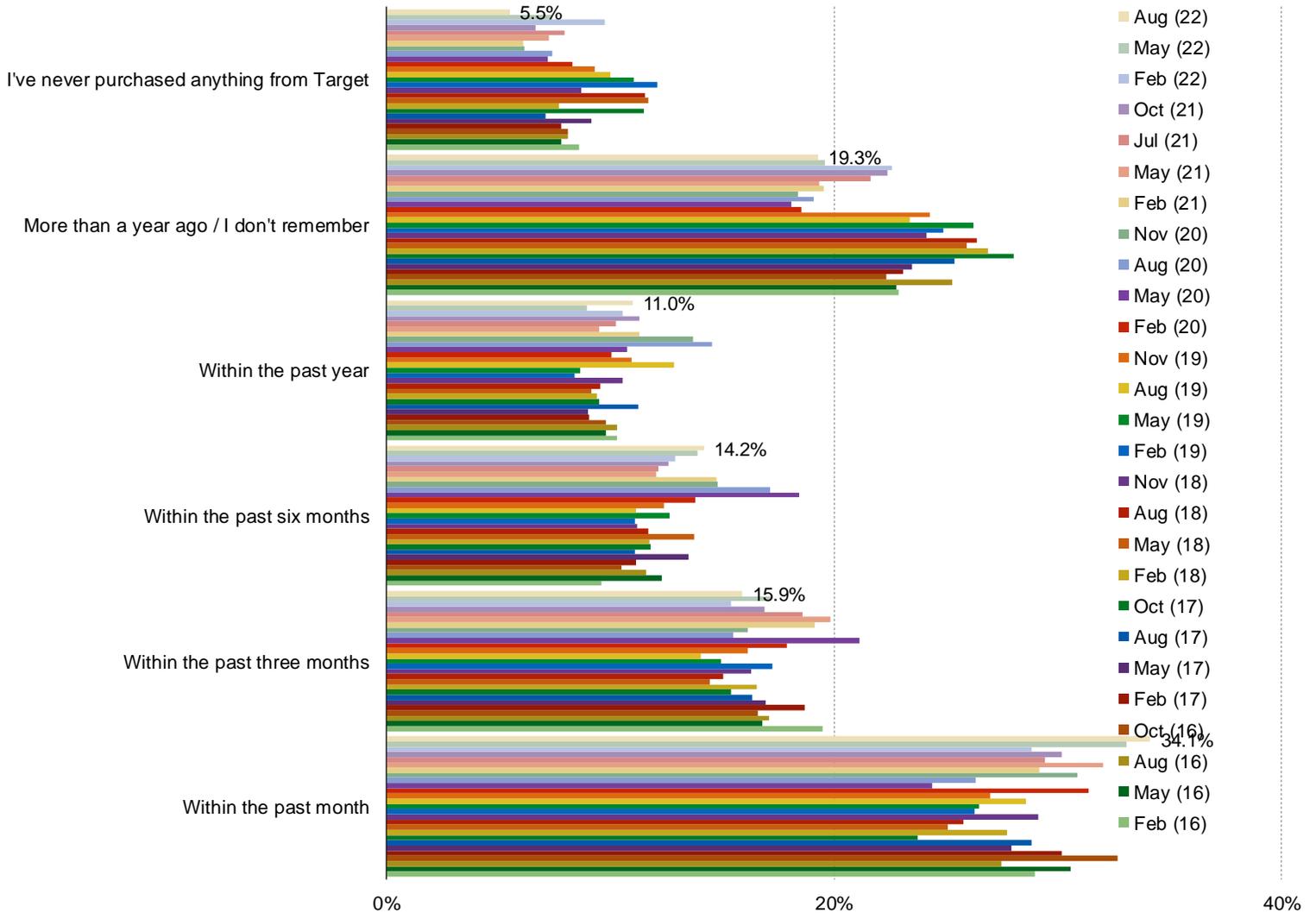
Posed to respondents who have purchased from Wal-Mart in the past 12 months.



TARGET DEEP DIVE

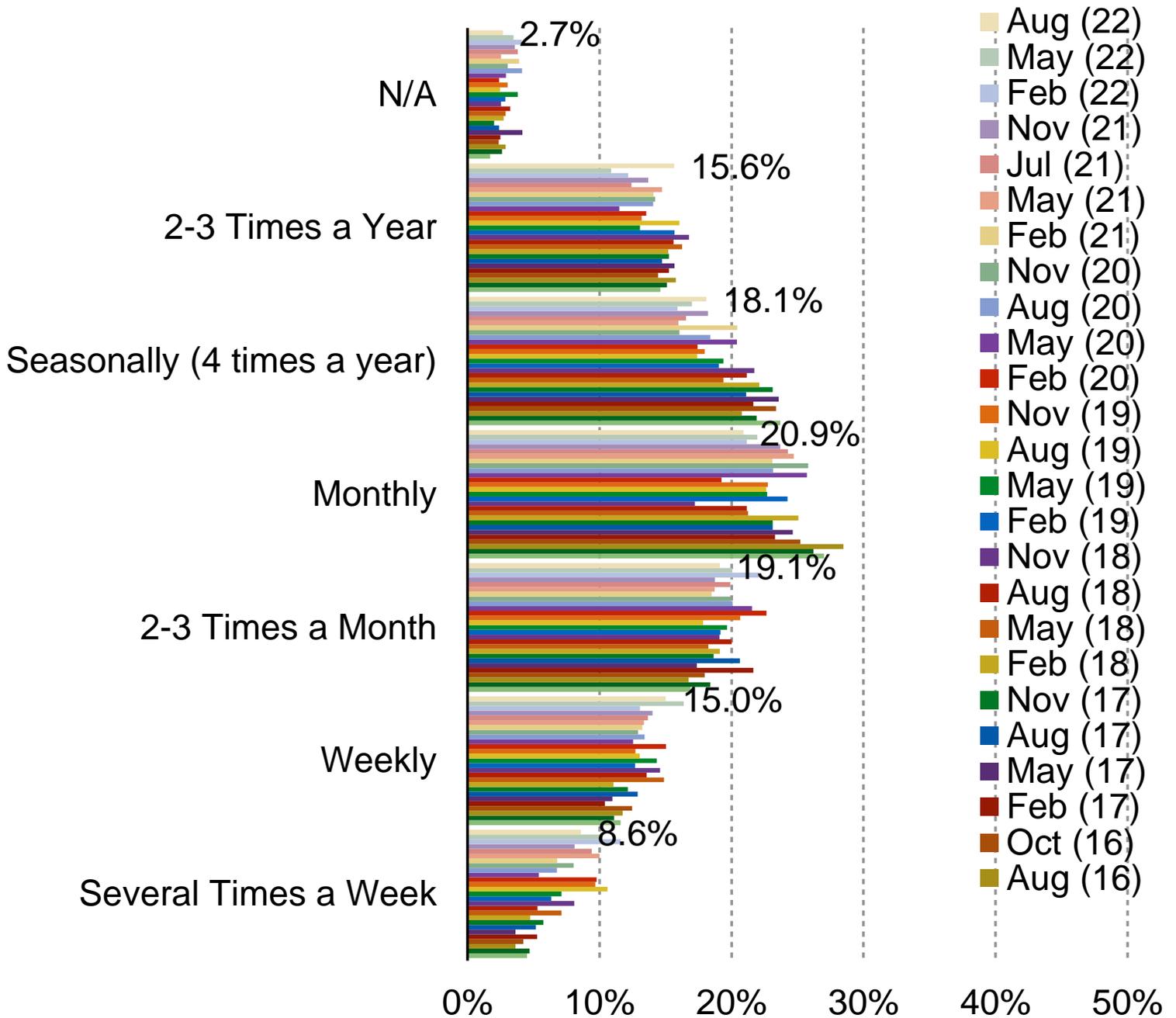
ALL CONSUMERS: LAST TIME PURCHASING FROM TARGET

This question was posed to all consumers.



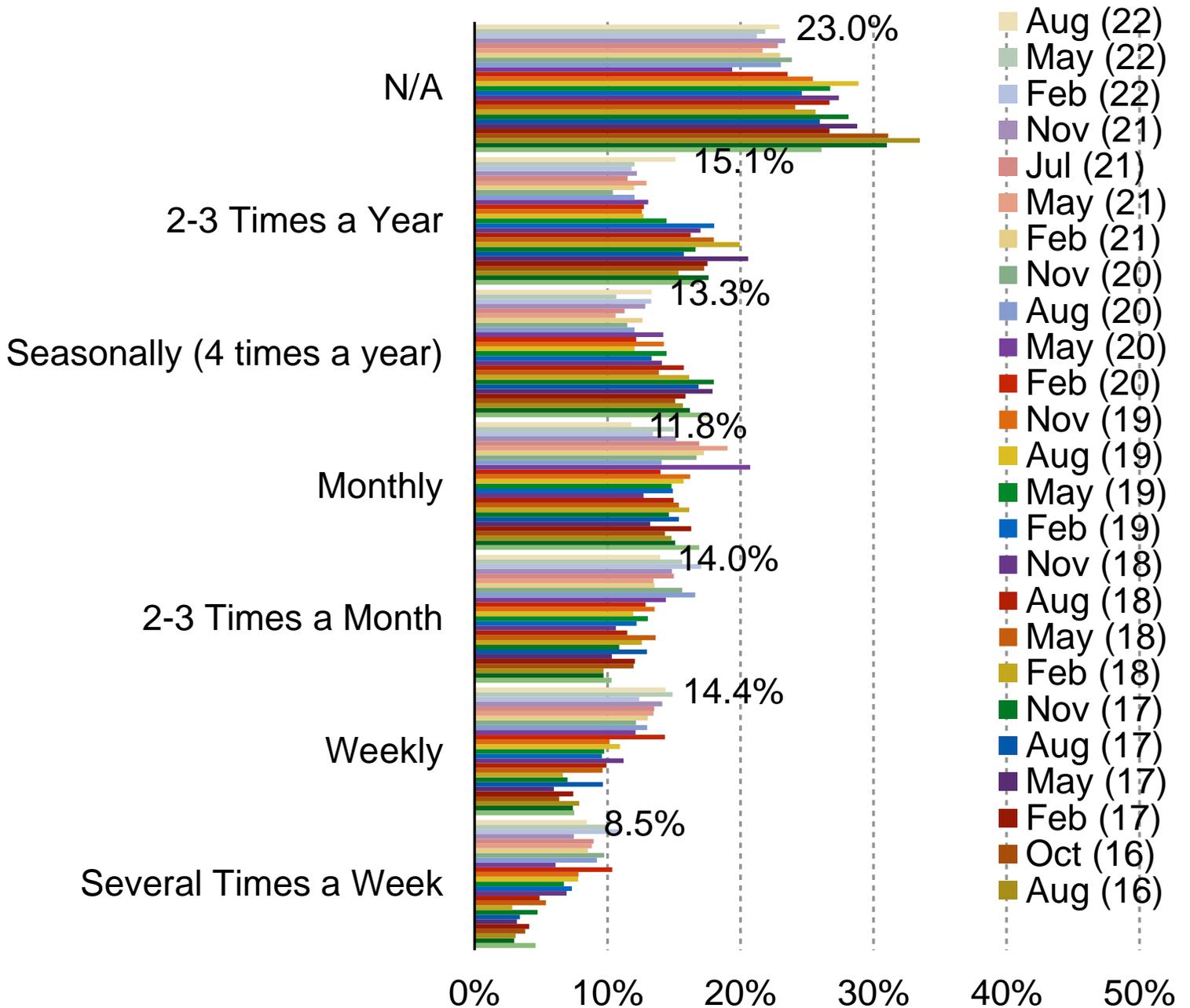
TARGET CUSTOMERS: SHOPPING FREQUENCY IN-STORES AT TARGET

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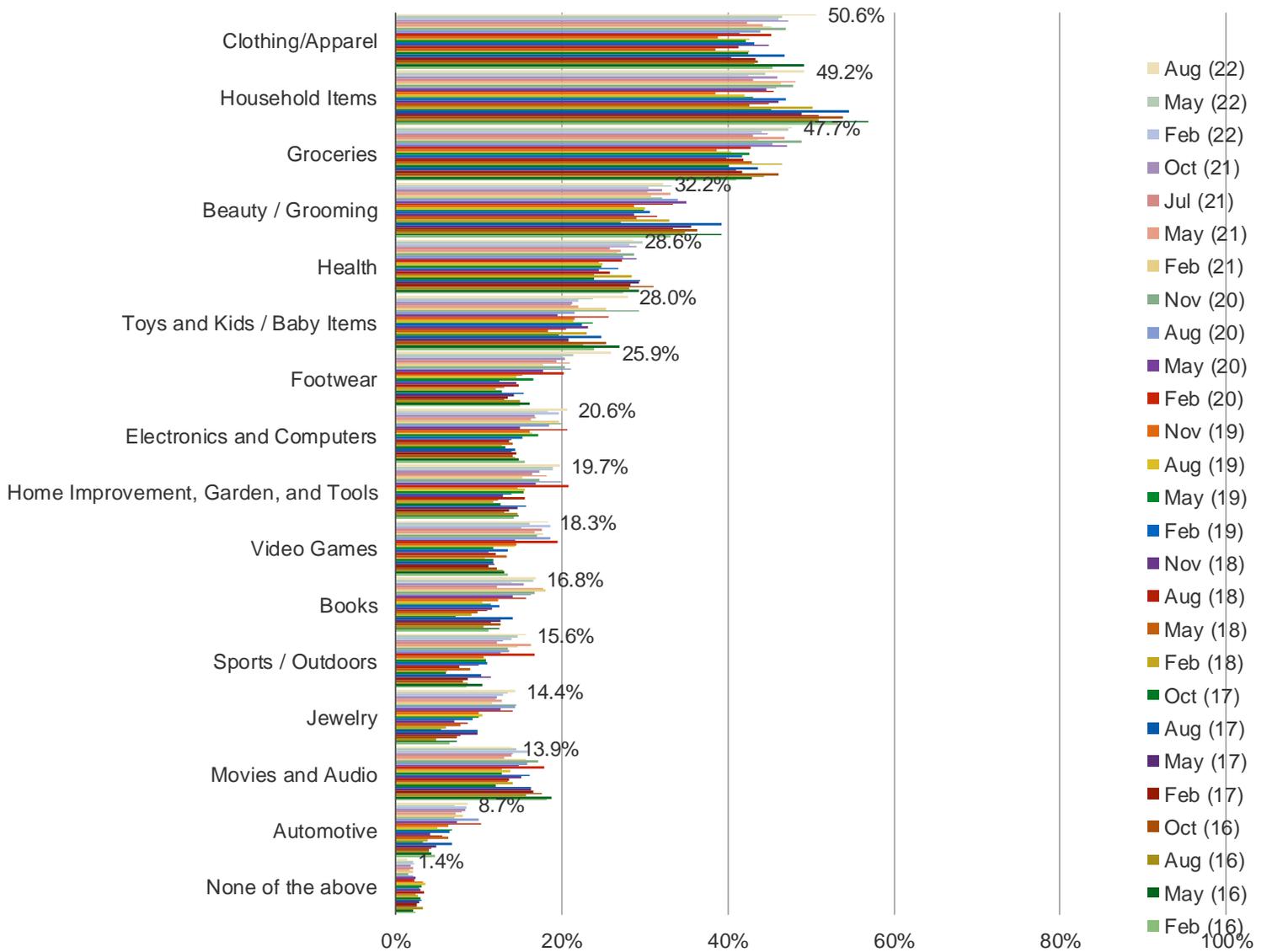
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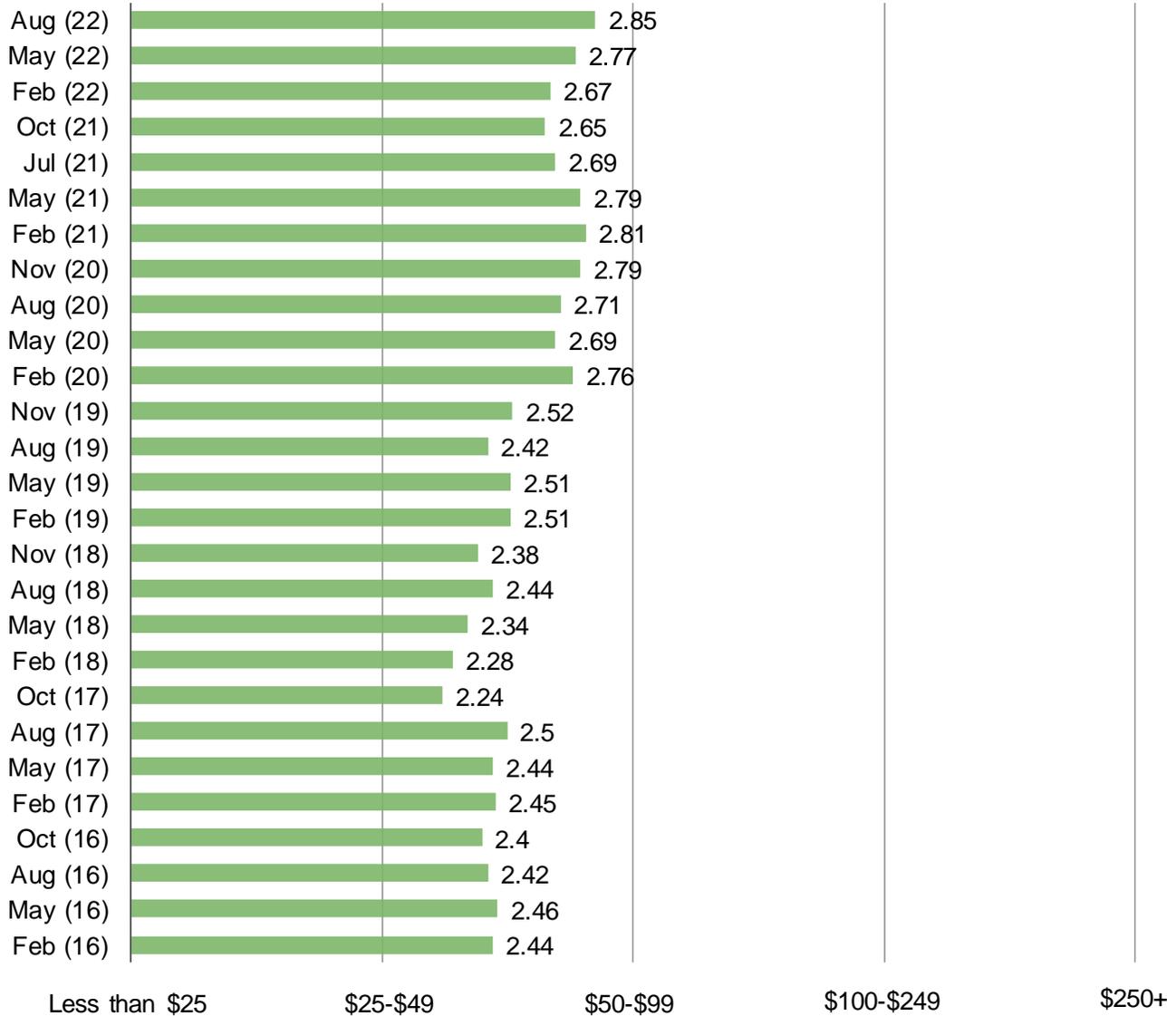
WHAT CUSTOMERS TYPICALLY BUY FROM TARGET (Q/Q TRACKING)

Posed to respondents who have purchased from Target in the past 12 months.



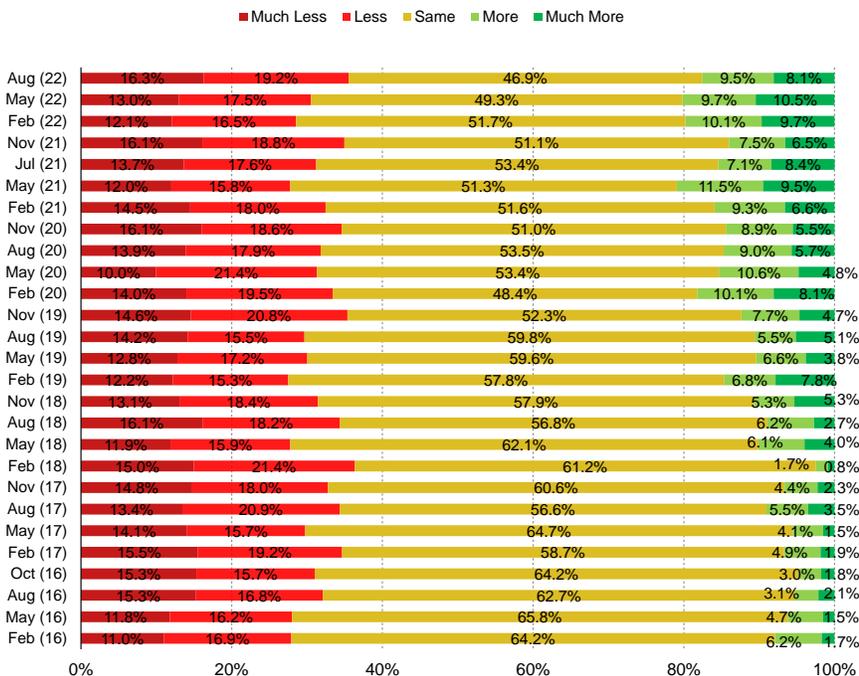
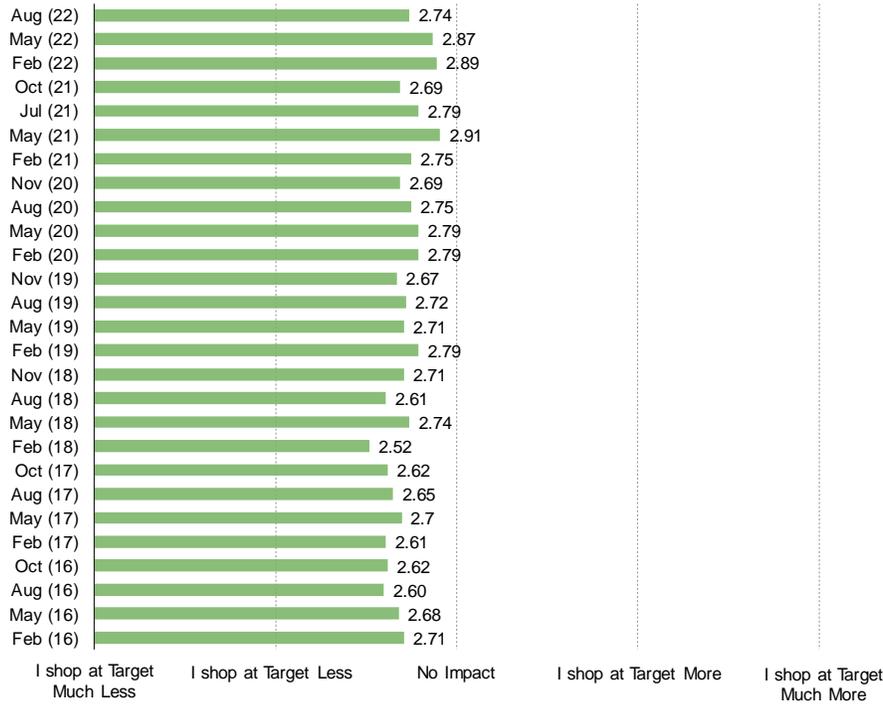
TARGET CUSTOMERS: AVERAGE SPEND PER VISIT

Posed to respondents who have purchased from Target in the past 12 months.



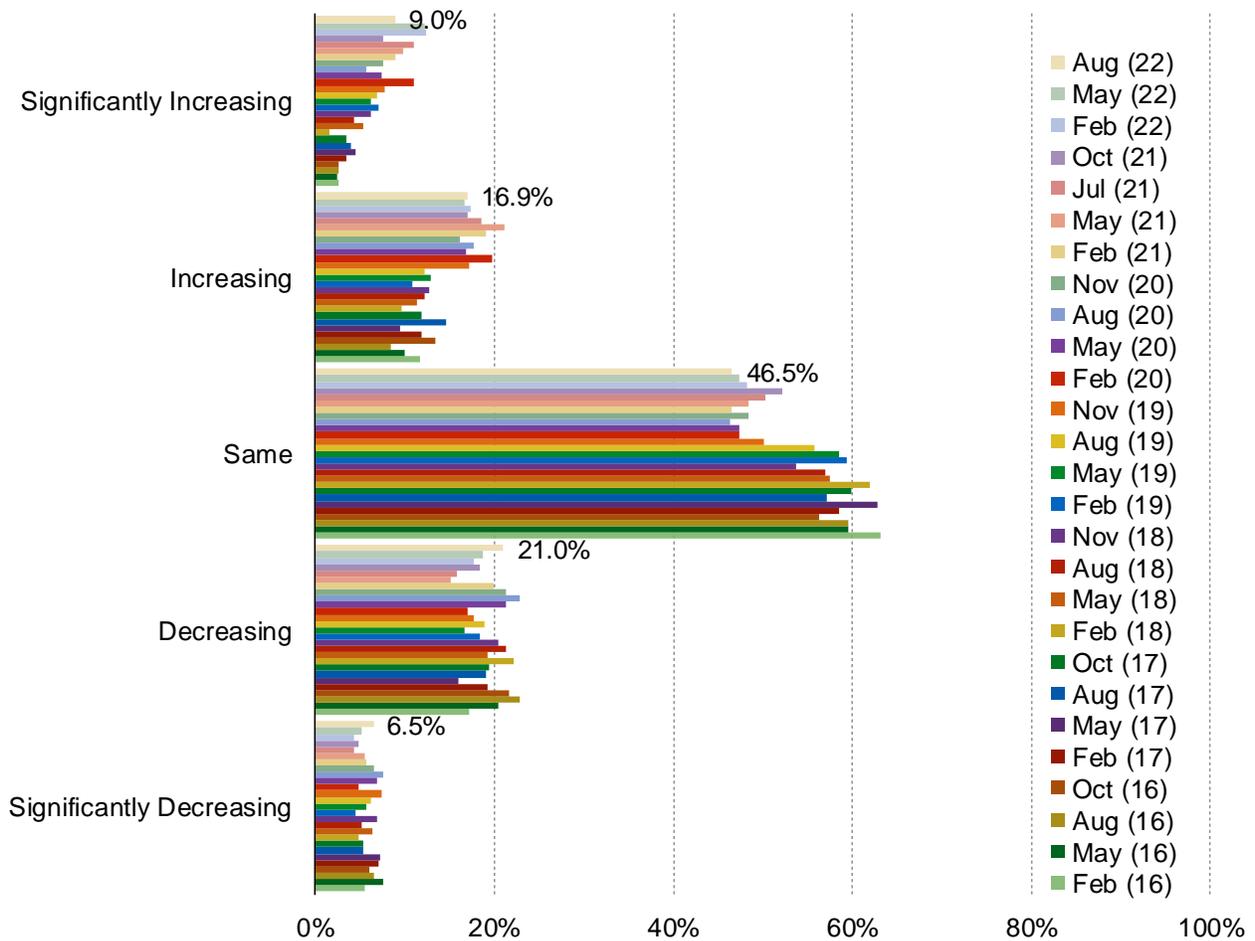
TARGET CUSTOMERS: IS AMAZON IMPACTING YOUR SHOPPING AT TARGET?

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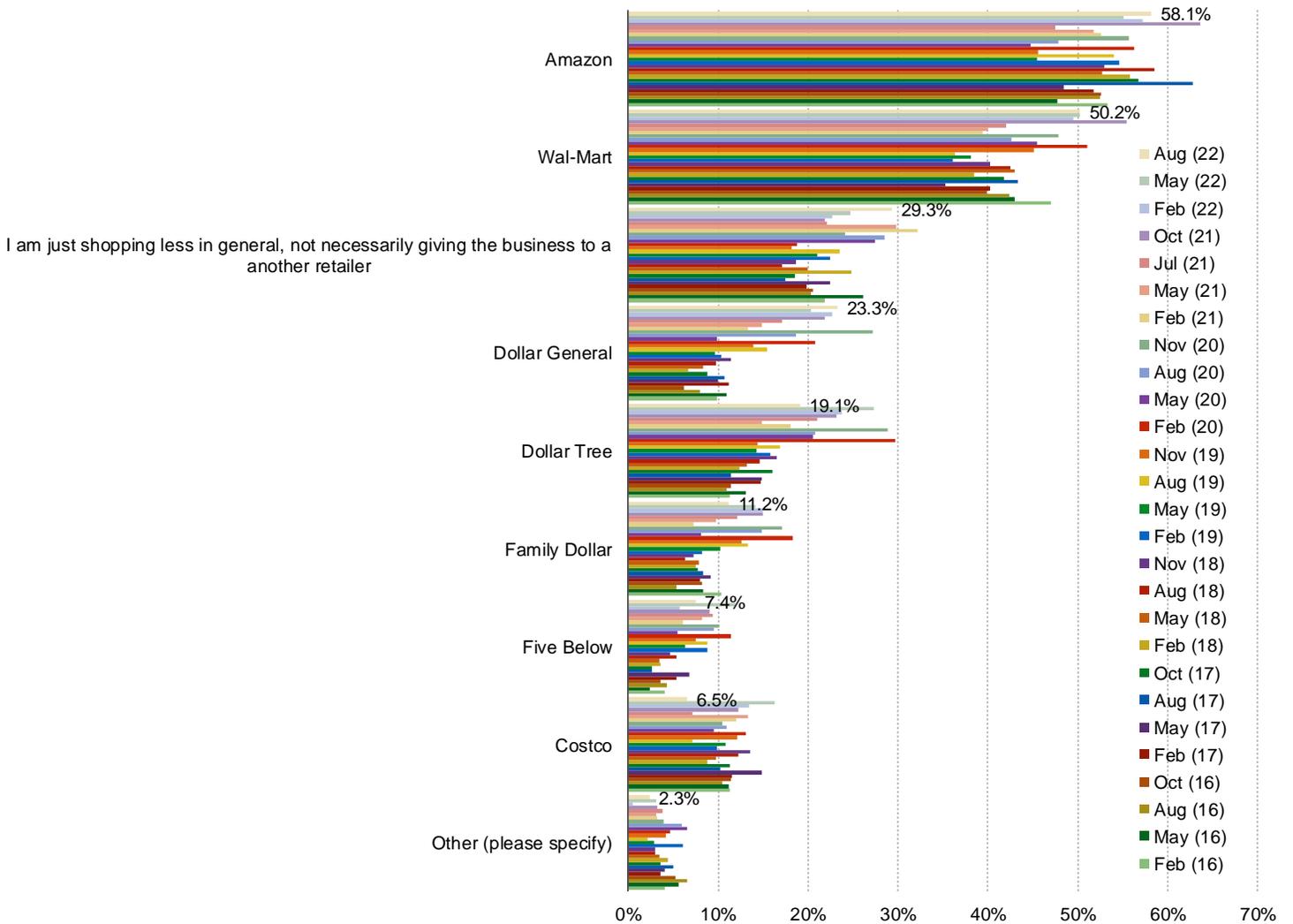
TARGET CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY

Posed to respondents who have purchased from Target in the past 12 months.



SINCE YOU ARE SHOPPING LESS AT TARGET, ARE YOU GIVING THAT BUSINESS TO ANY OF THE FOLLOWING RETAILERS INSTEAD?

Posed to respondents who have purchased from Target in the past 12 months AND said they have been shopping Target less recently.

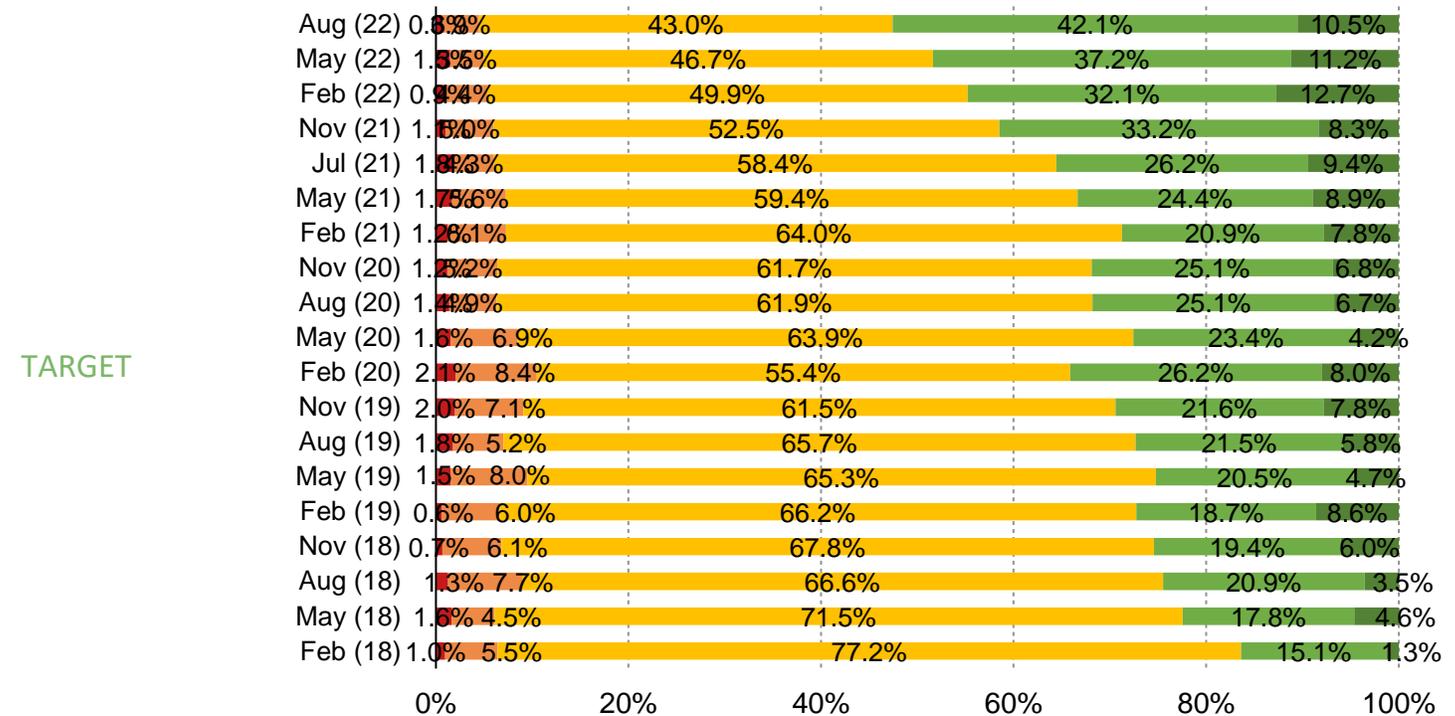
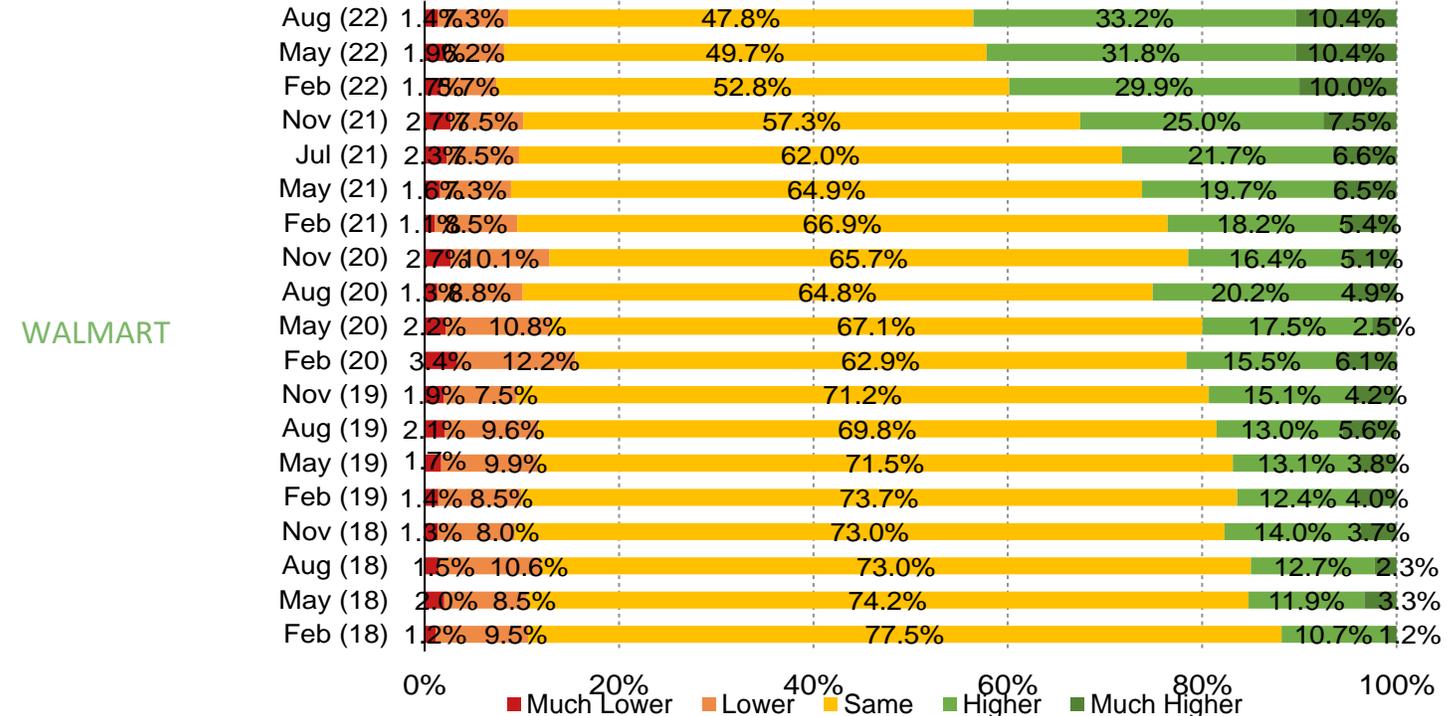


SENTIMENT TOWARD PRICING

WHEN YOU LAST VISITED, DID YOU NOTICE ANY CHANGES TO PRODUCT PRICES?

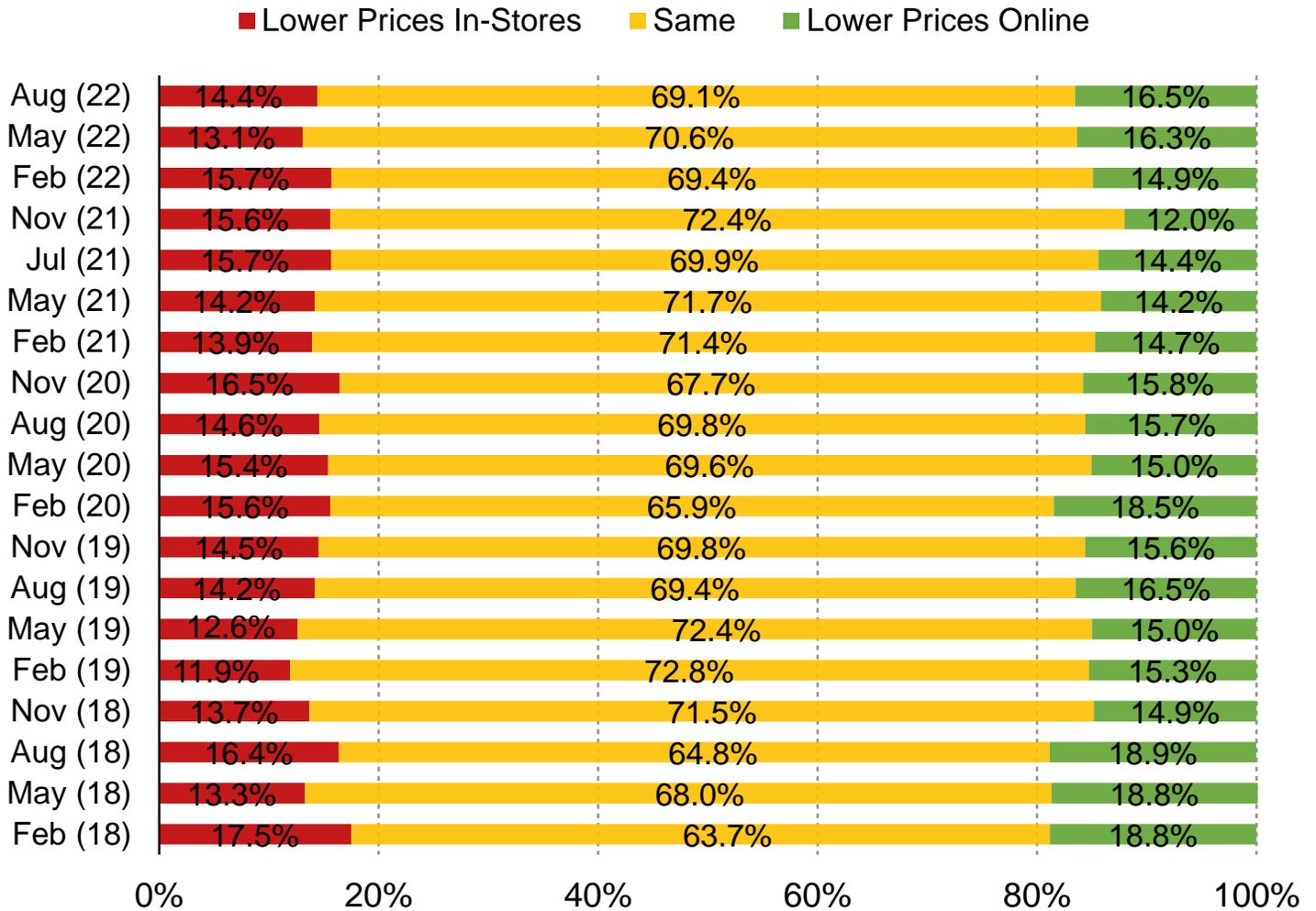
This question was posed to consumers who have shopped each retailer in the past 12 months.

■ Much Lower ■ Lower ■ Same ■ Higher ■ Much Higher



FROM YOUR EXPERIENCE, ARE PRICES ON THE WAL-MART SITE DIFFERENT THAN THE PRICES IN-STORES

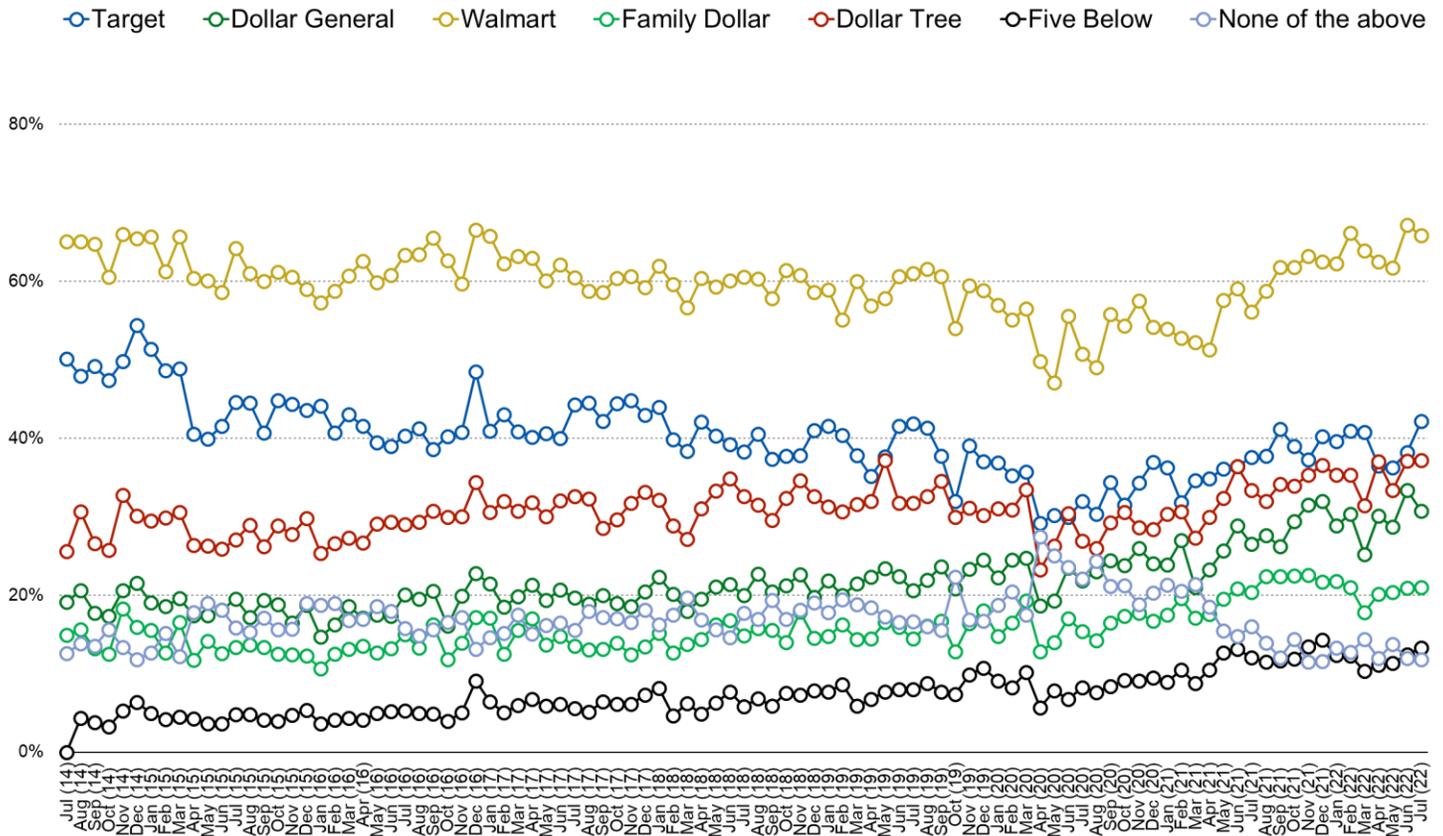
This question was posed to consumers who have shopped Wal-Mart online AND in-stores monthly or more frequently.



MONTHLY TRACKERS

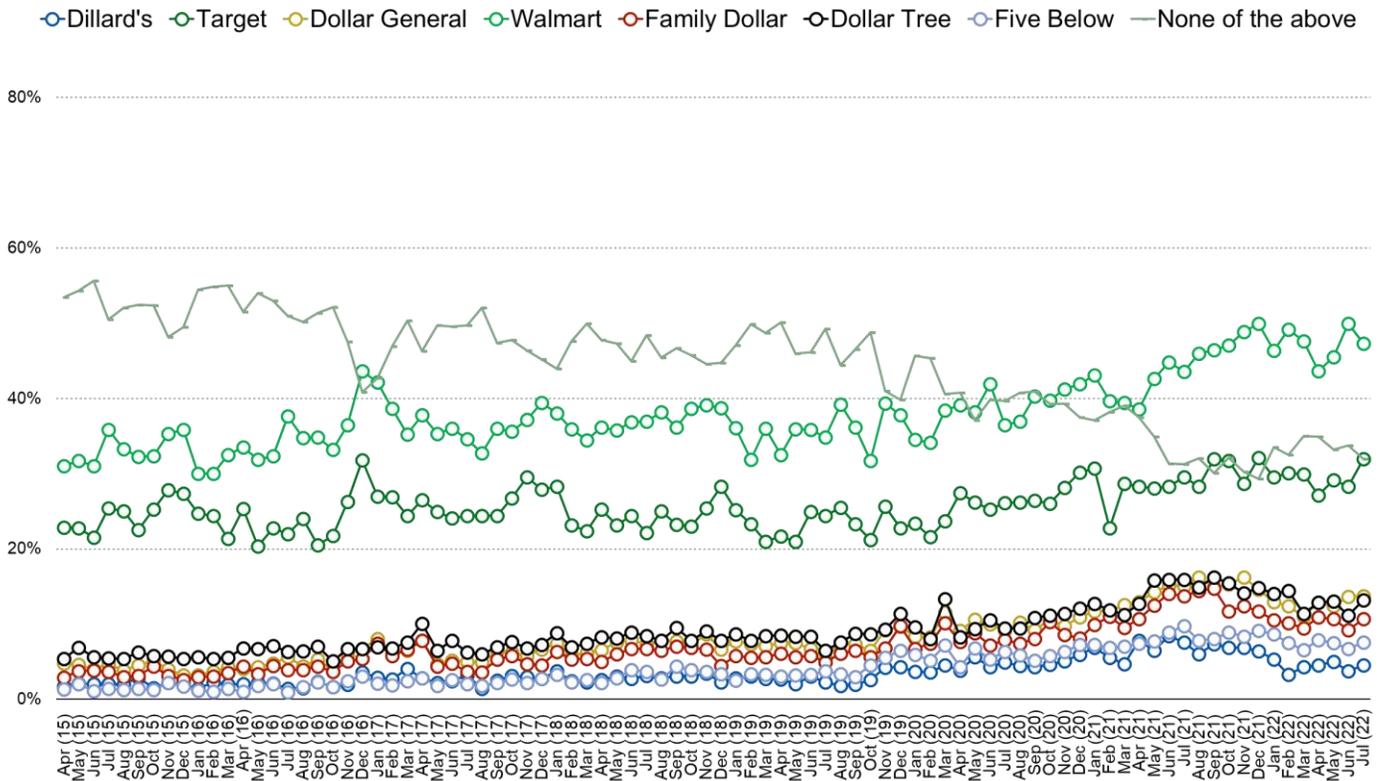
HAVE YOU VISITED ANY OF THE FOLLOWING COMPANY STORES IN THE PAST MONTH?

This question was posed to all respondents.



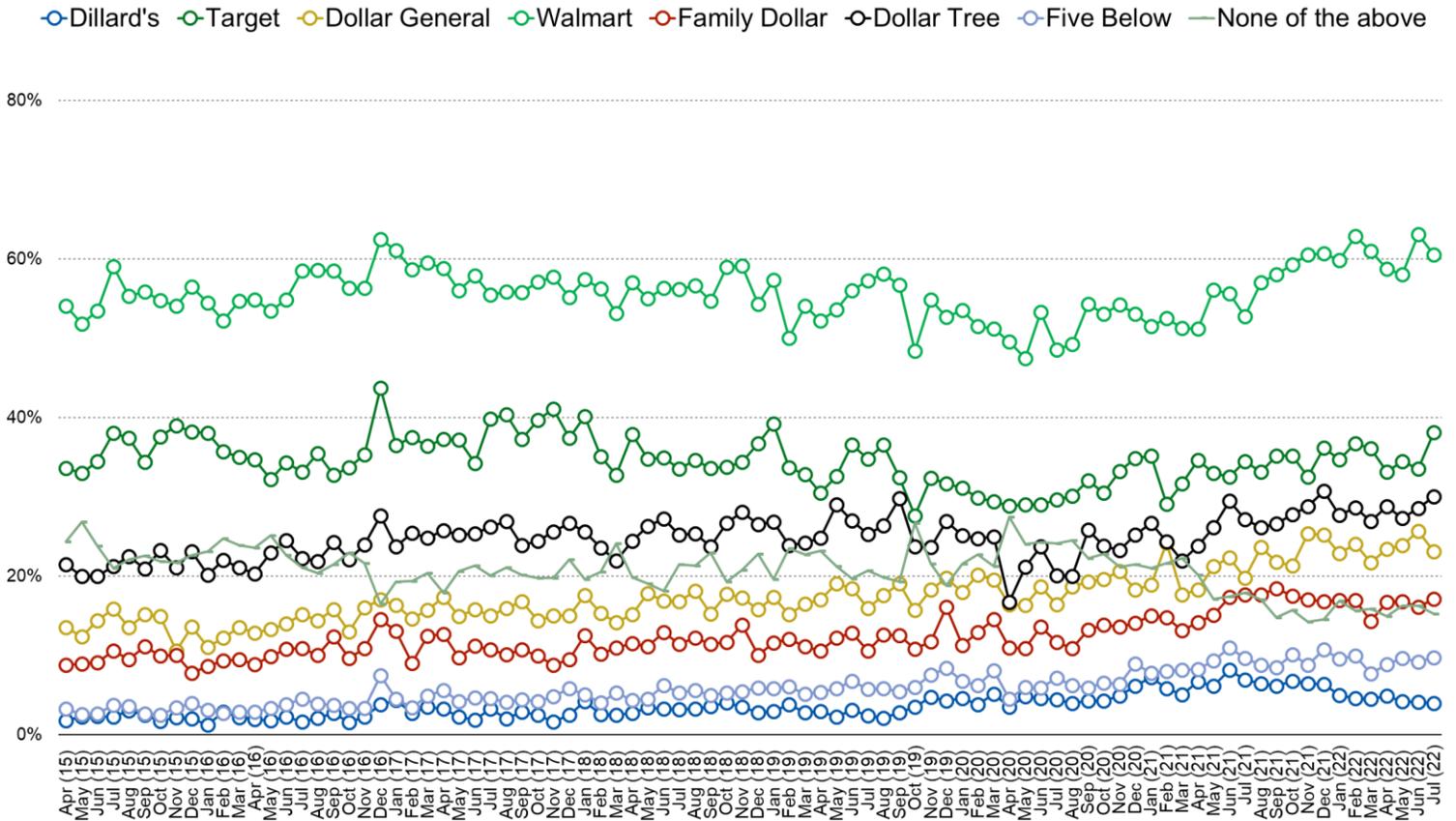
HAVE YOU VISITED ANY OF THE FOLLOWING COMPANY WEBSITES IN THE PAST MONTH?

This question was posed to all respondents.



HAVE YOU MADE A PURCHASE FROM ANY OF THE FOLLOWING IN THE PAST MONTH? (ONLINE OR IN-STORES)

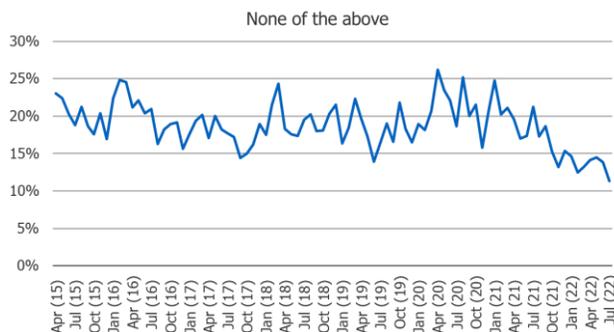
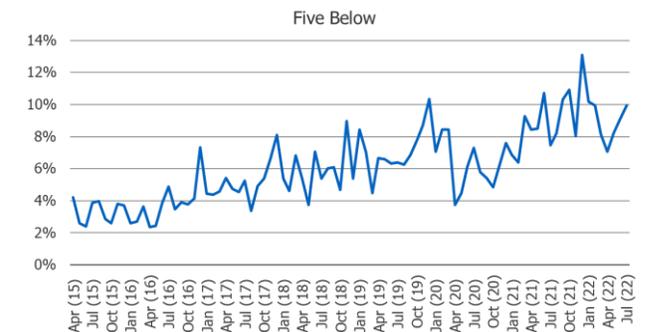
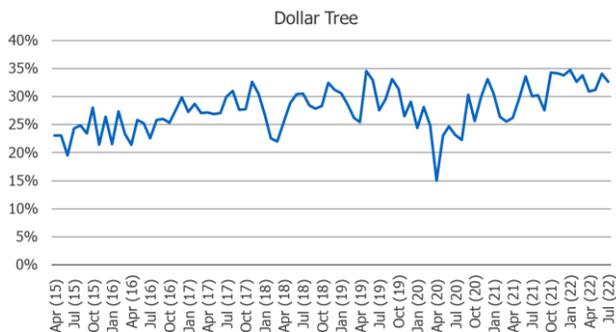
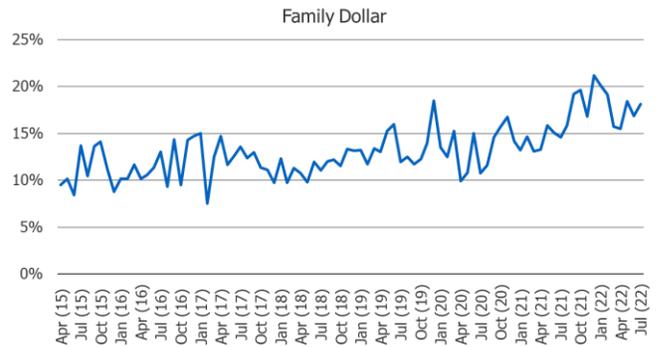
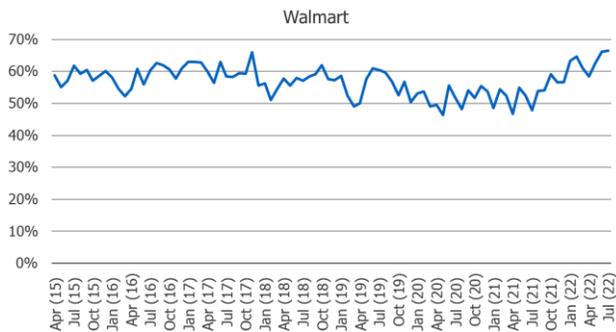
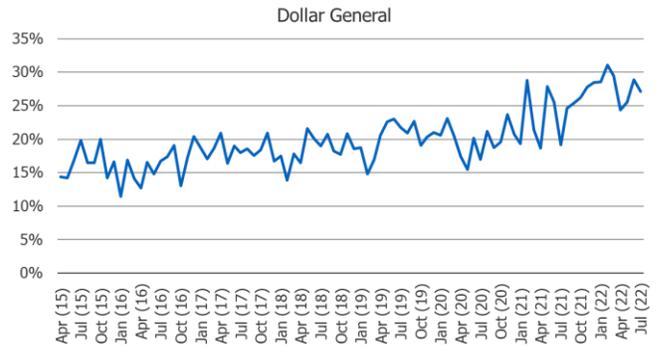
This question was posed to all respondents.



MONTHLY TRACKERS CROSS-TABBED

RESPONDENTS WHO SAID THEIR DISCRETIONARY SPENDING IS LOWER: % SHOPPED IN THE PAST MONTH:

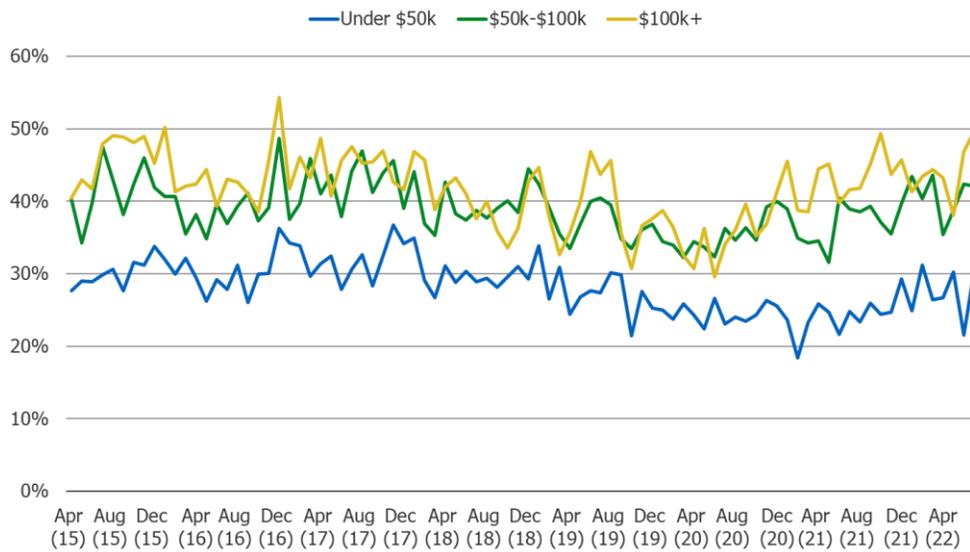
This question was posed to all respondents.



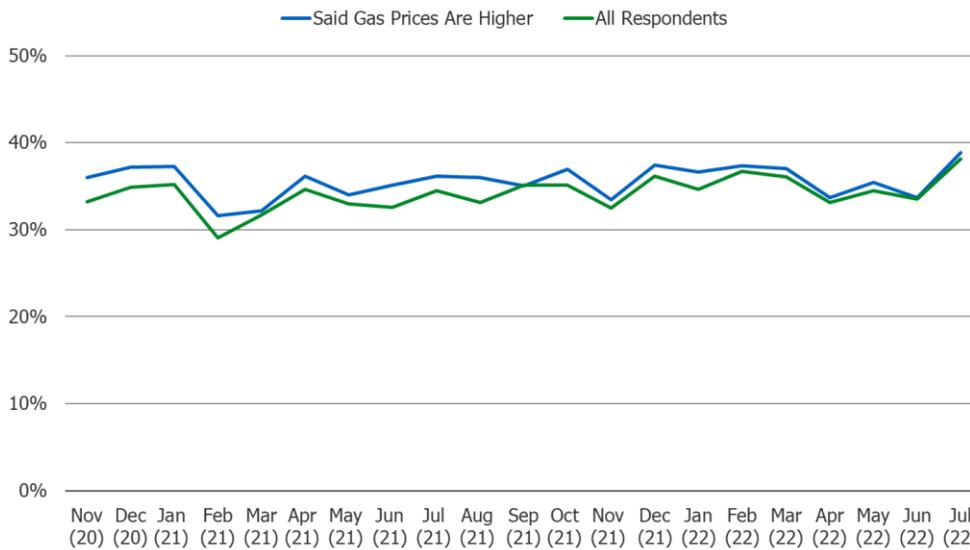
% PURCHASED FROM TARGET IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



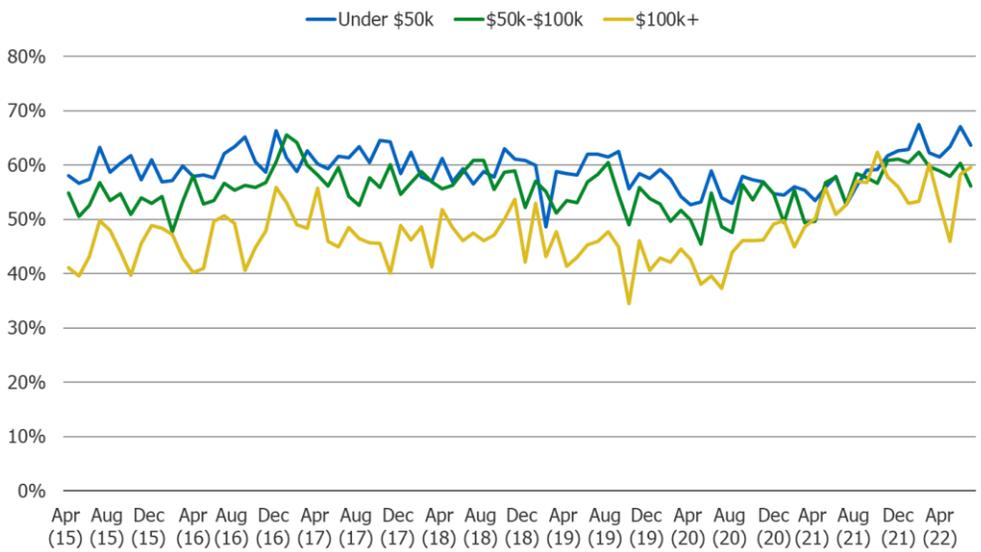
Gas Prices Cross-Tabs



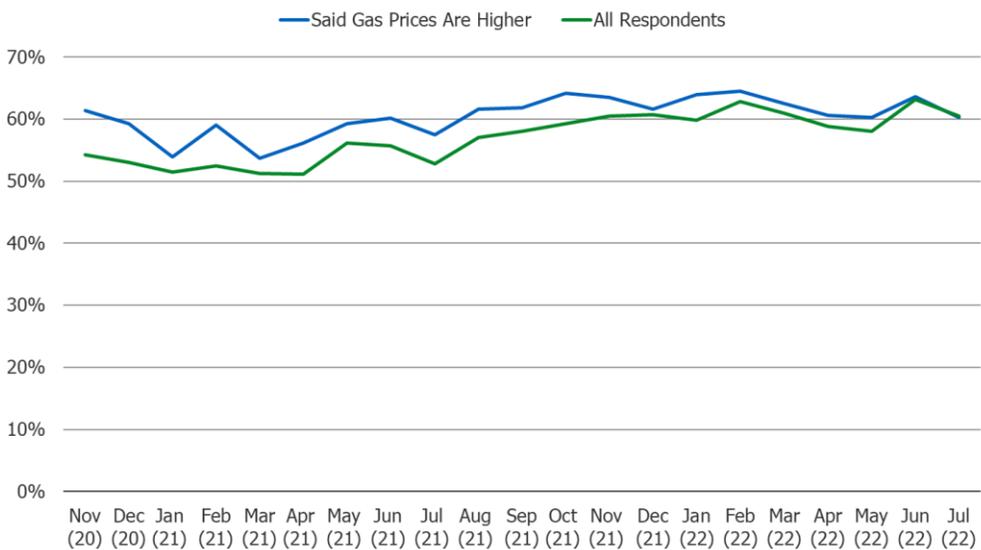
% PURCHASED FROM WALMART IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



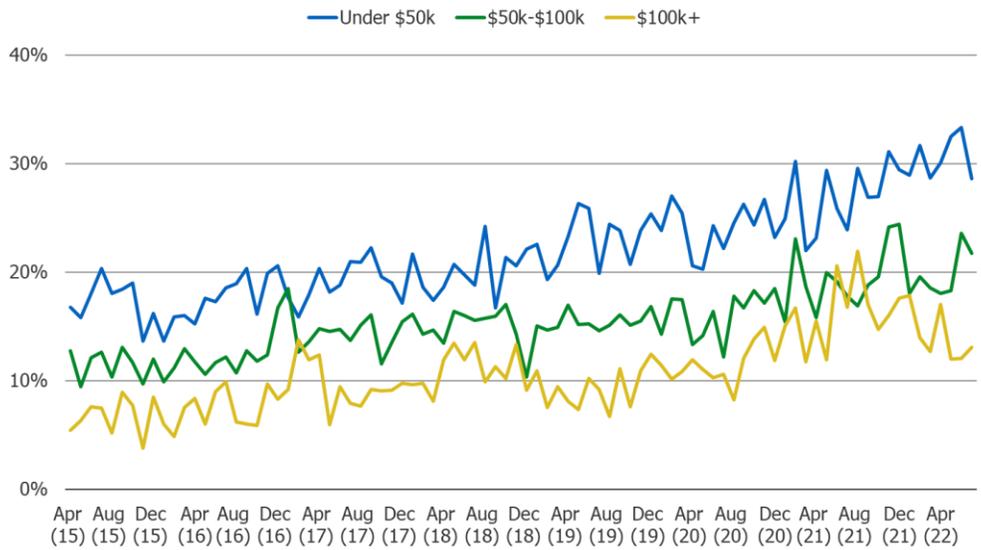
Gas Prices Cross-Tabs



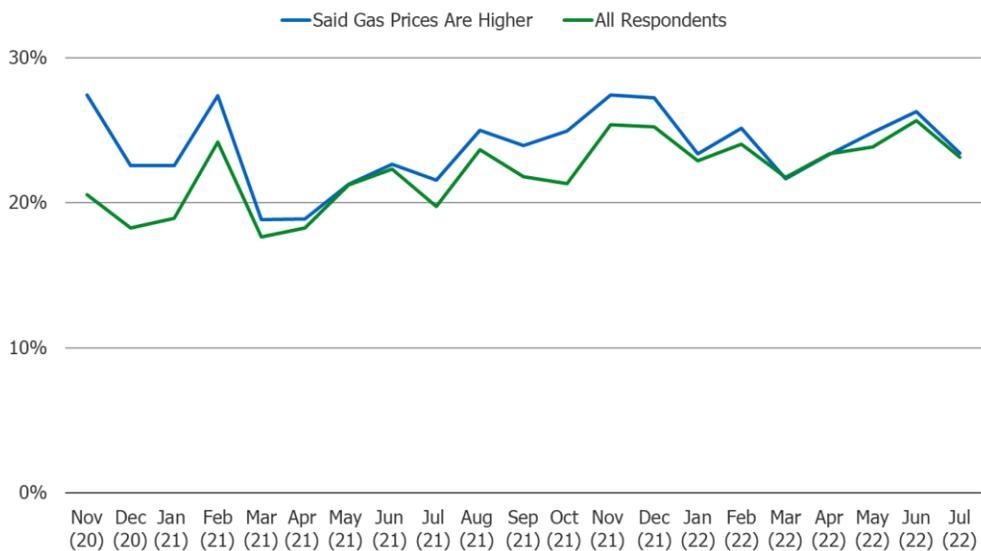
% PURCHASED FROM DOLLAR GENERAL IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



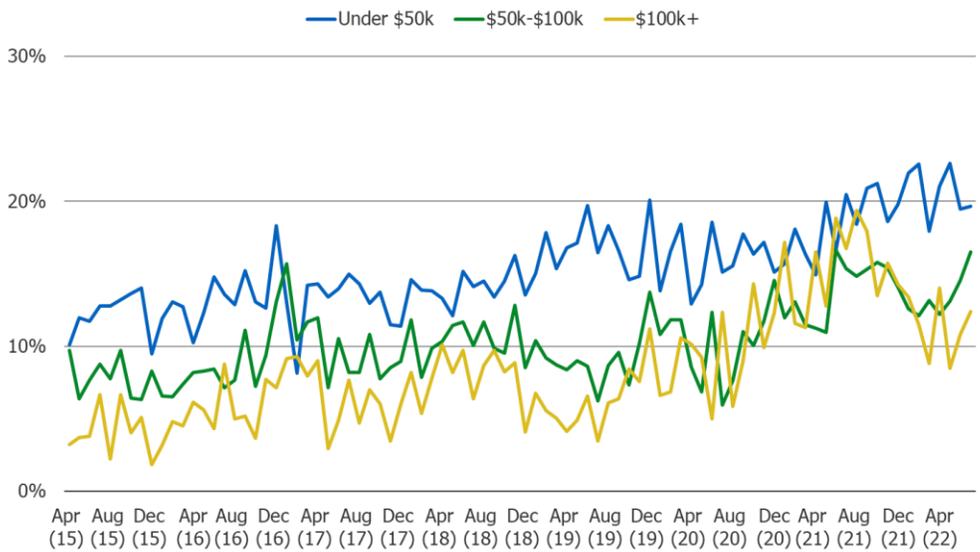
Gas Prices Cross-Tabs



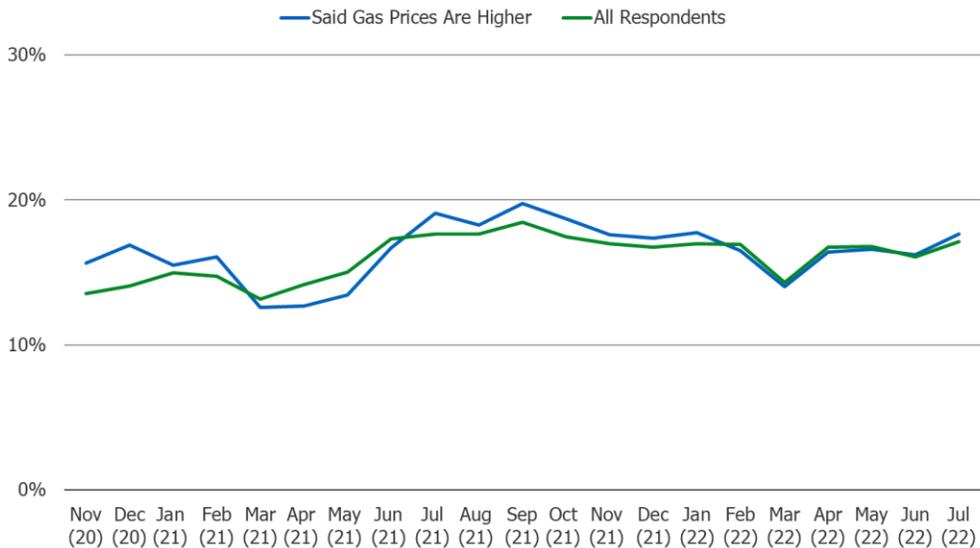
% PURCHASED FROM FAMILY DOLLAR IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



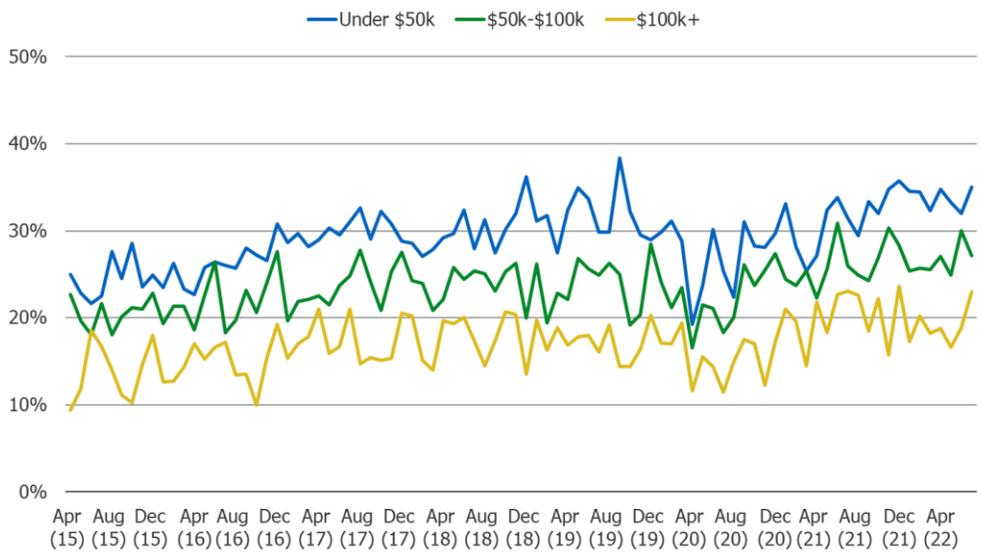
Gas Prices Cross-Tabs



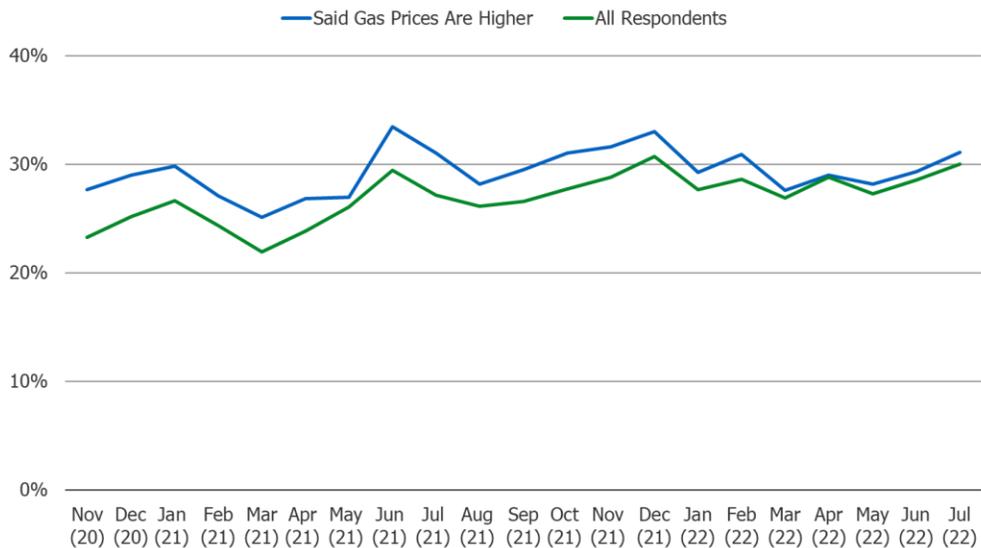
% PURCHASED FROM DOLLAR TREE IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



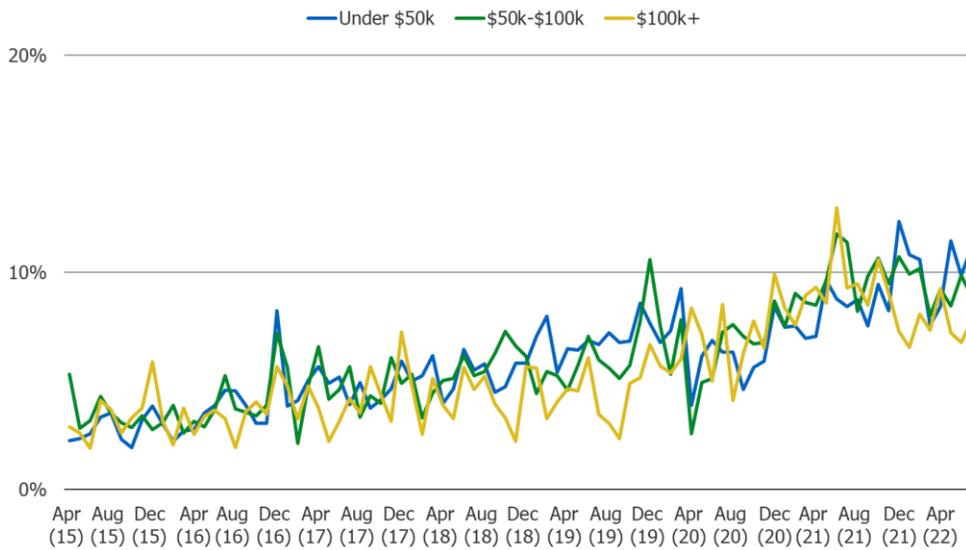
Gas Prices Cross-Tabs



% PURCHASED FROM FIVE BELOW IN THE PAST MONTH

This question was posed to all respondents.

Income Cross-Tabs



Gas Prices Cross-Tabs

