

BESPOKE SURVEYS

## Low-Cost Retailers Vol 26

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 remained fairly stable of late for Walmart. In-store shopping continues to be favored over online, but we have seen online's share increase over time. Groceries continue to be largest driver of traffic for Walmart followed by household items and clothing/apparel. Self-reported average spend per visit is tracking better q/q.

### TARGET TRENDS

Self-reported shopping recency and frequency have improved in this latest volume. Similar to Walmart trends, in-store shopping is favored over online, but we have seen online gaining over a longer term horizon. Average spend per visit is tracking improved q/q.

### PRICING TRENDS

The share of Walmart and Target customers who note higher prices continues to increase in our trackers. Comparing the two, the feedback is worse for Target relative to Walmart.

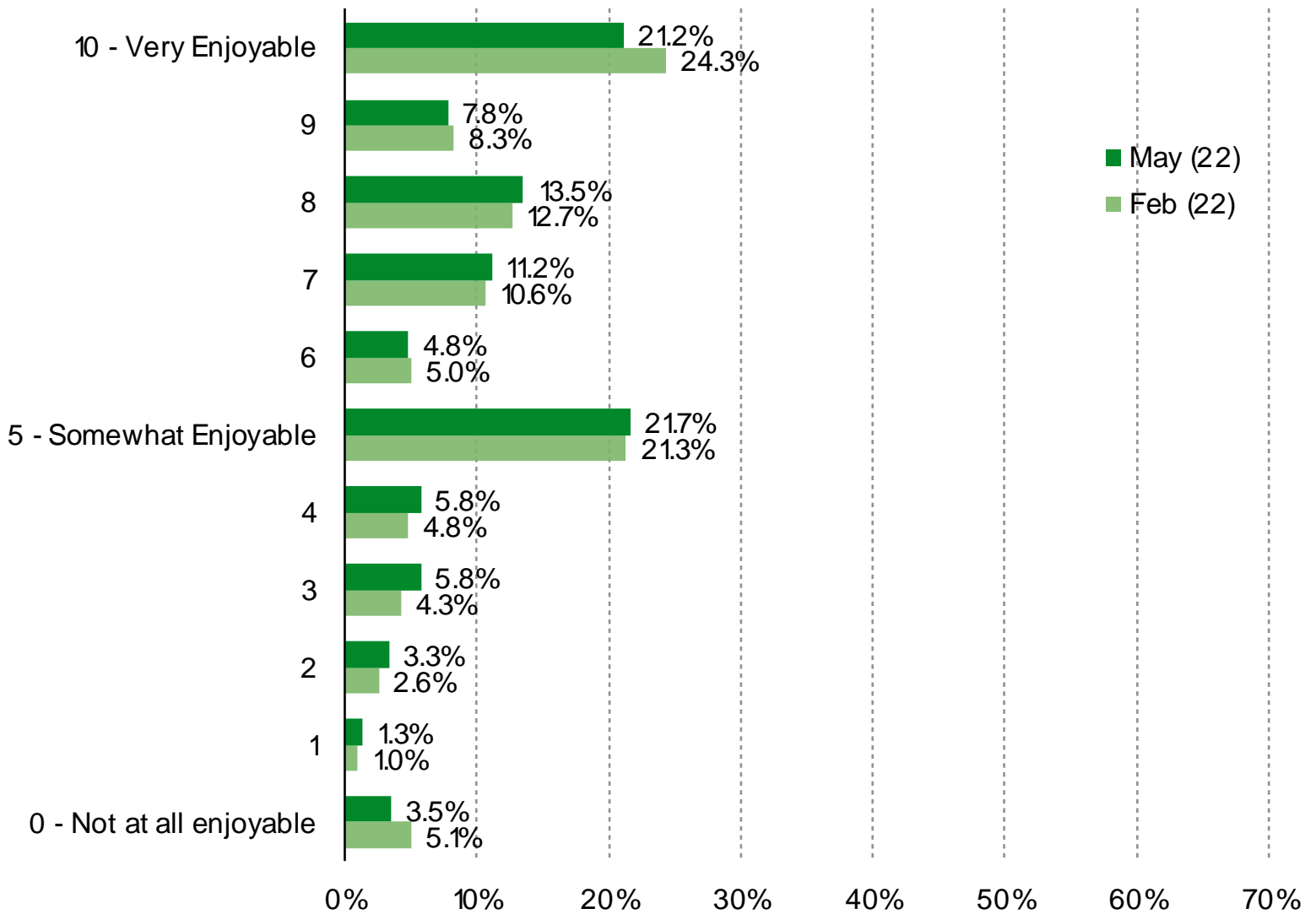
### DOLLAR STORES

While self-reported engagement trends for both Walmart and Target are net positive, we'd also note that an increasing percentage of those who said they have been using the former and the latter less have been shopping dollar stores instead.

## IN-STORE EXPERIENCE

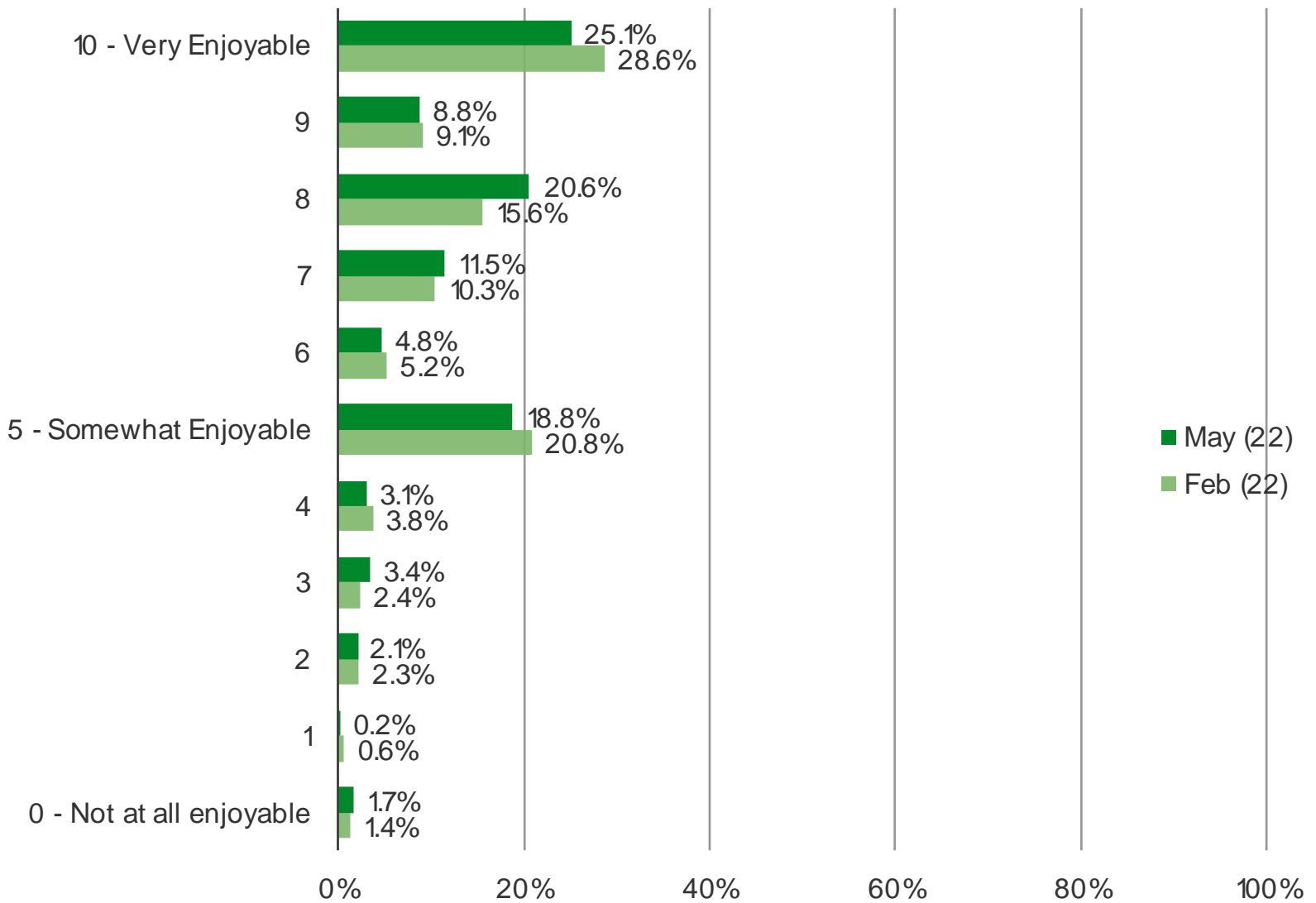
DO YOU FIND IT ENJOYABLE TO VISIT WAL-MART STORES?

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



DO YOU FIND IT ENJOYABLE TO VISIT TARGET STORES?

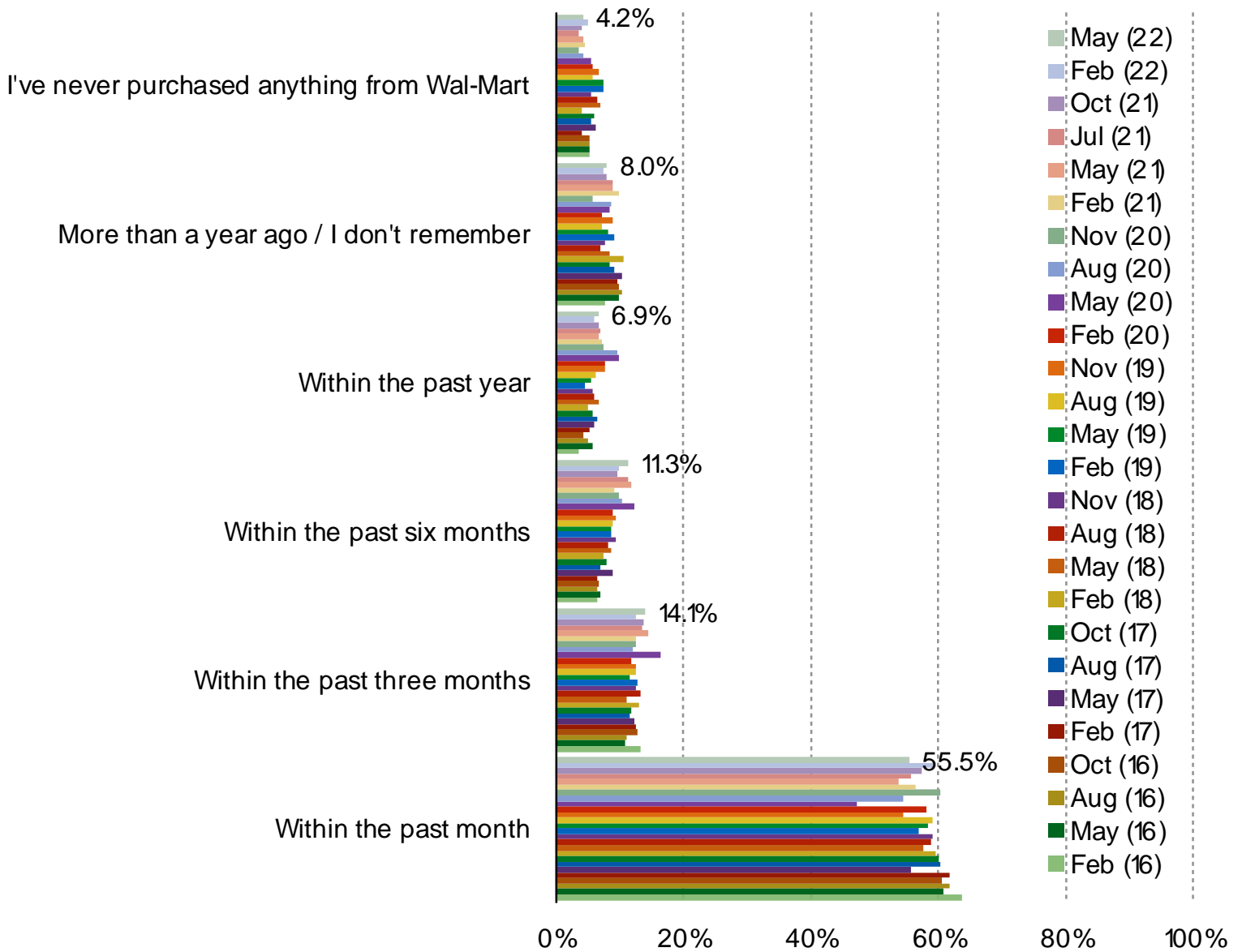
This question was posed to all consumers who visit Target stores.



## WAL-MART DEEP DIVE

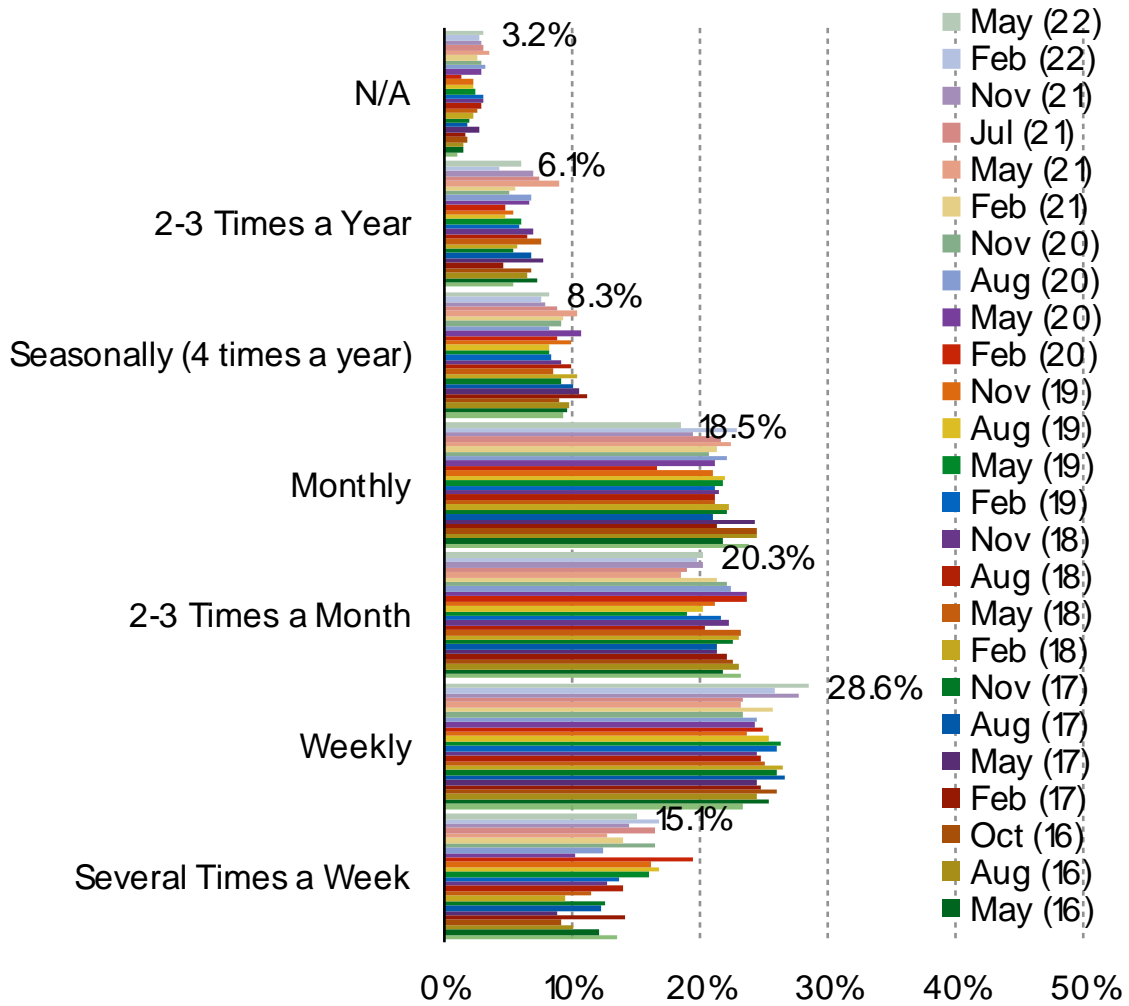
ALL CONSUMERS: LAST TIME PURCHASING FROM WAL-MART

This question was posed to all consumers.



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

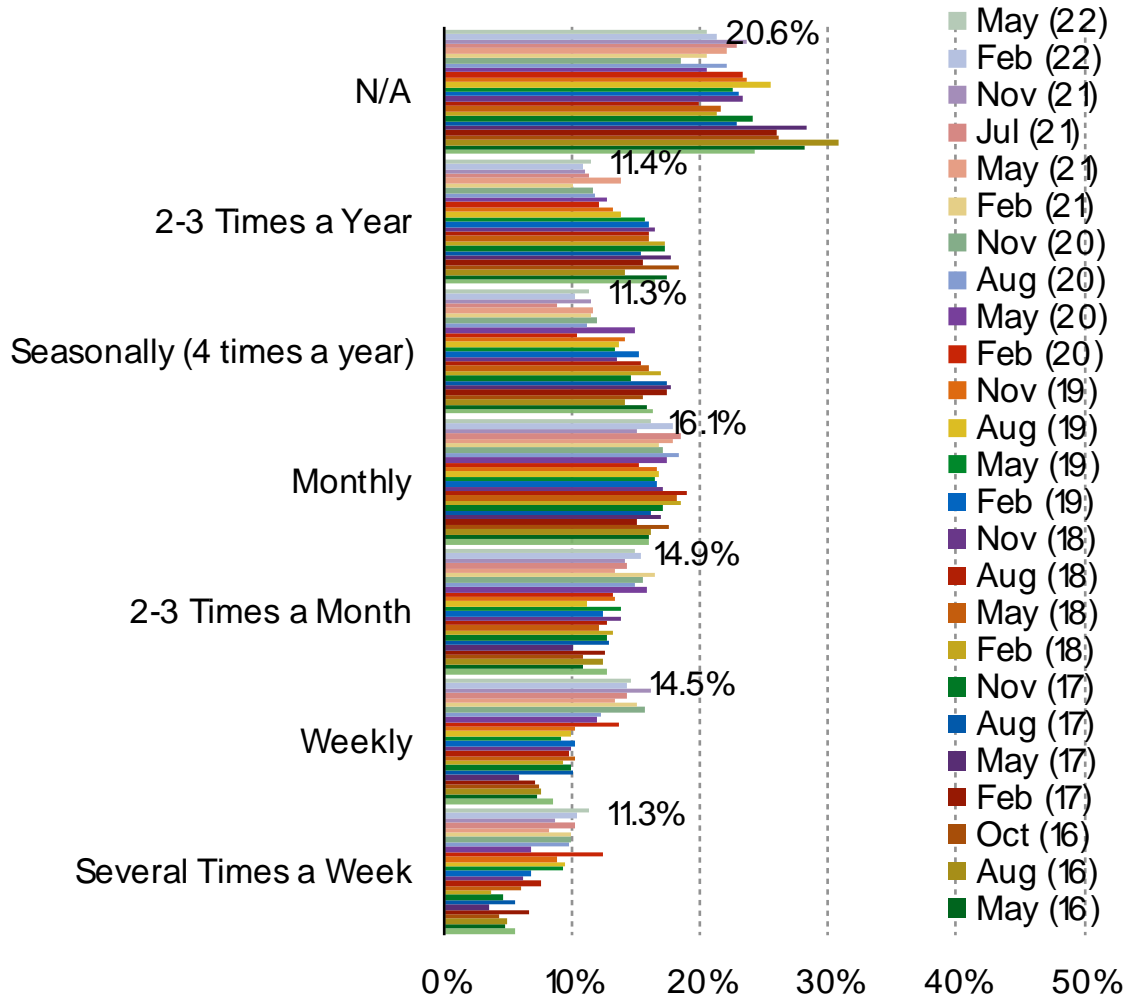
Posed to respondents who have purchased from Wal-Mart in the past 12 months.





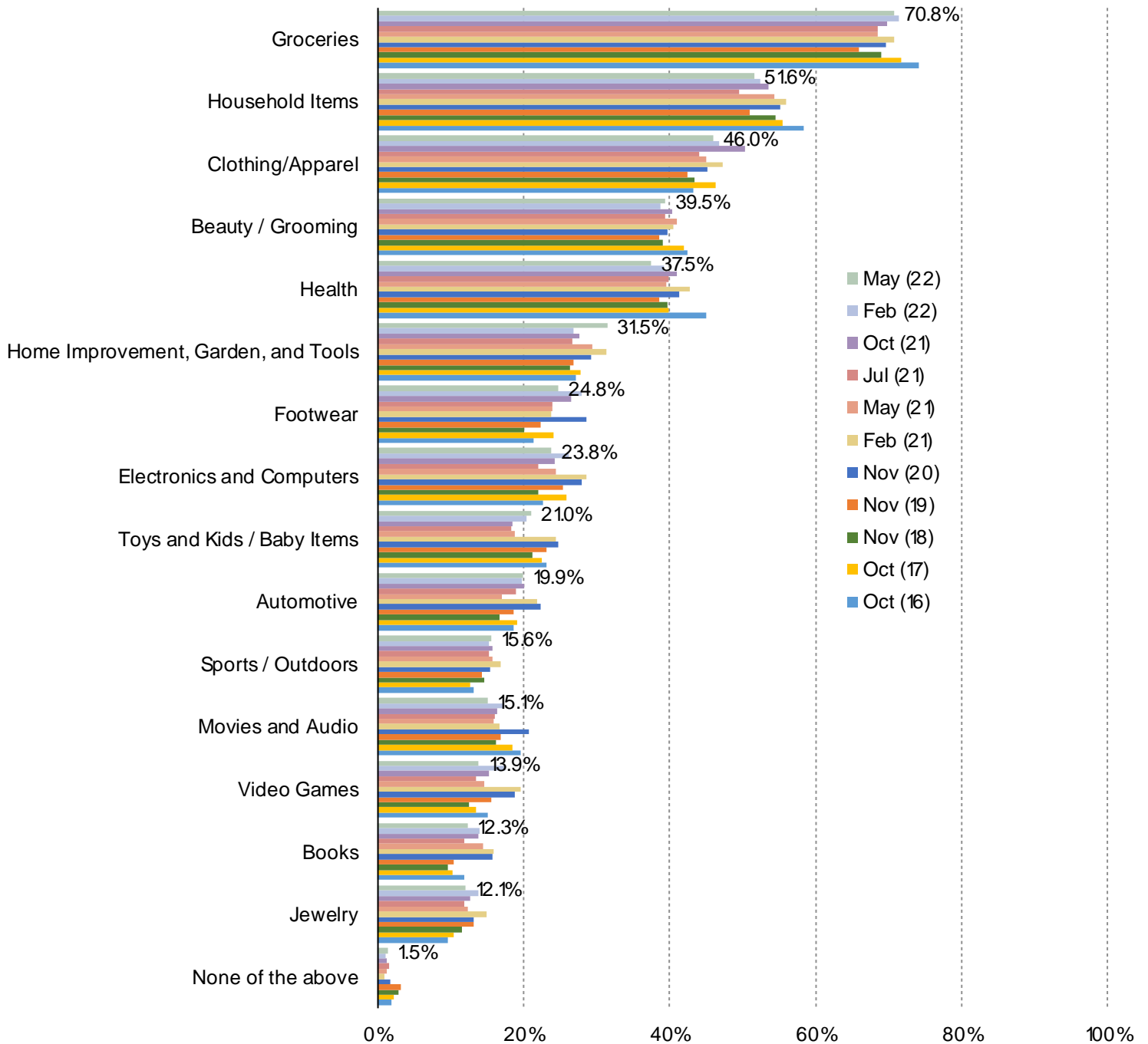
WAL-MART CUSTOMERS: SHOPPING FREQUENCY ONLINE AT WAL-MART

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



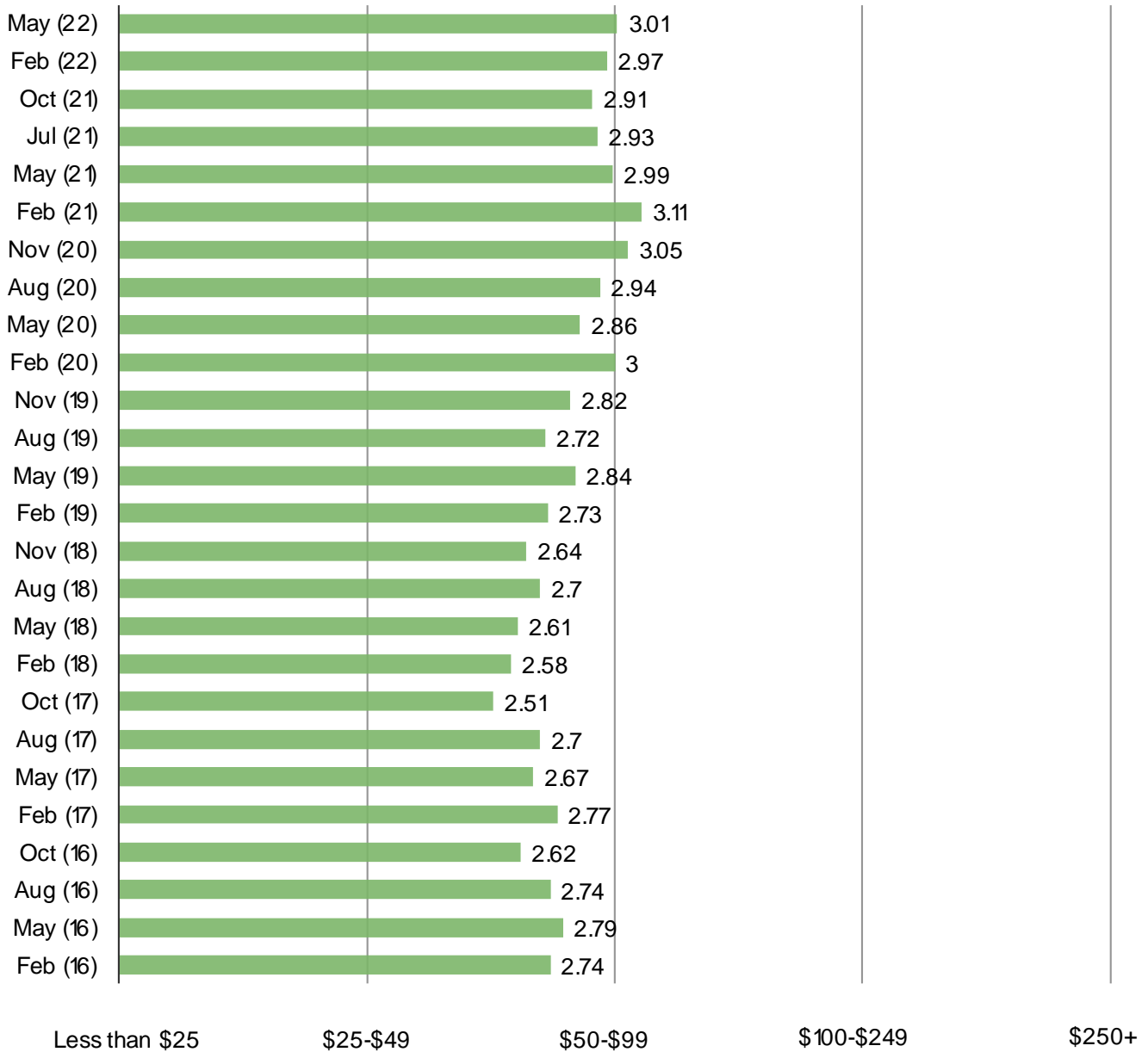
WAL-MART CUSTOMERS: WHAT THEY TYPICALLY BUY FROM WAL-MART (Q/Q TREND)

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.



Less than \$25

\$25-\$49

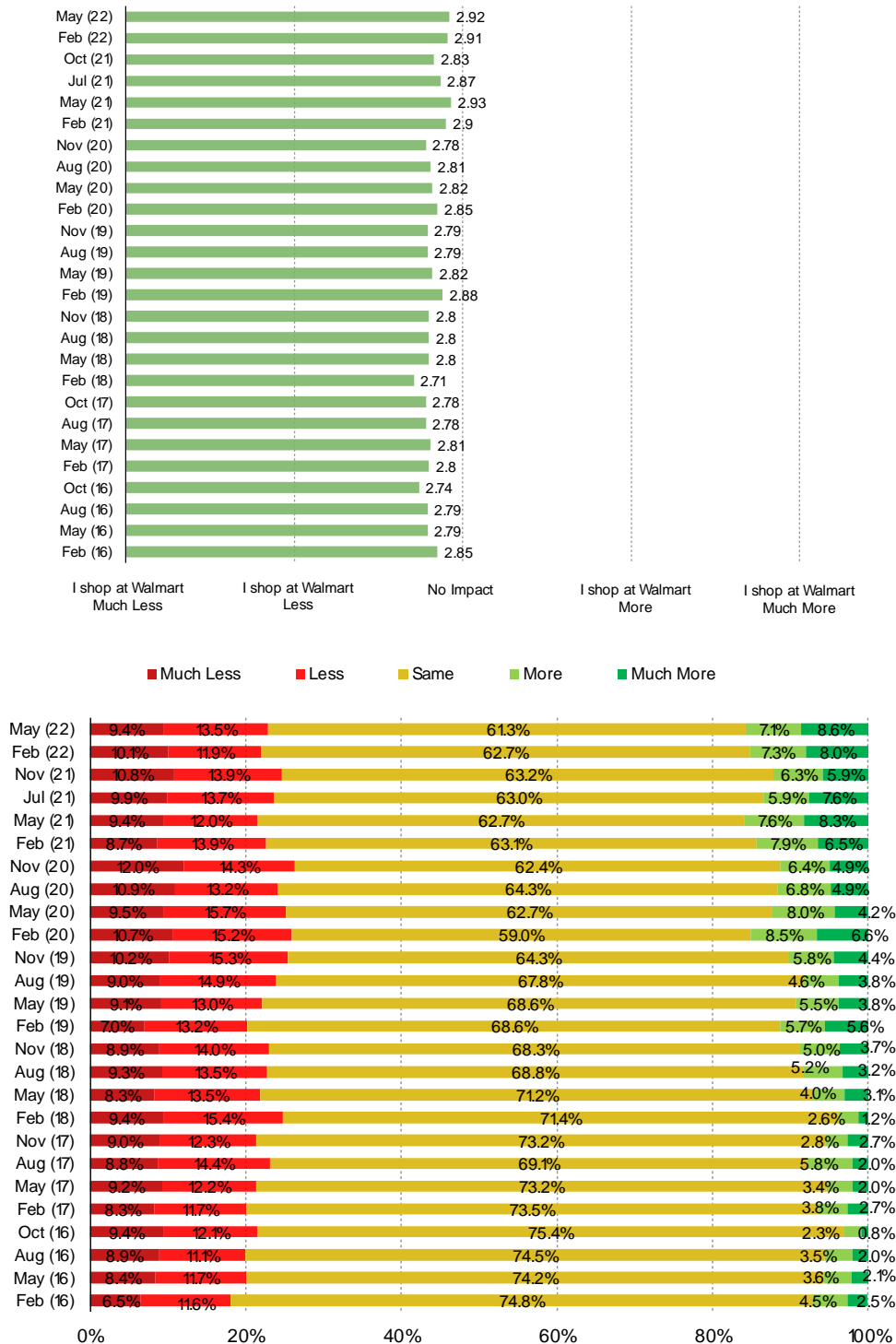
\$50-\$99

\$100-\$249

\$250+

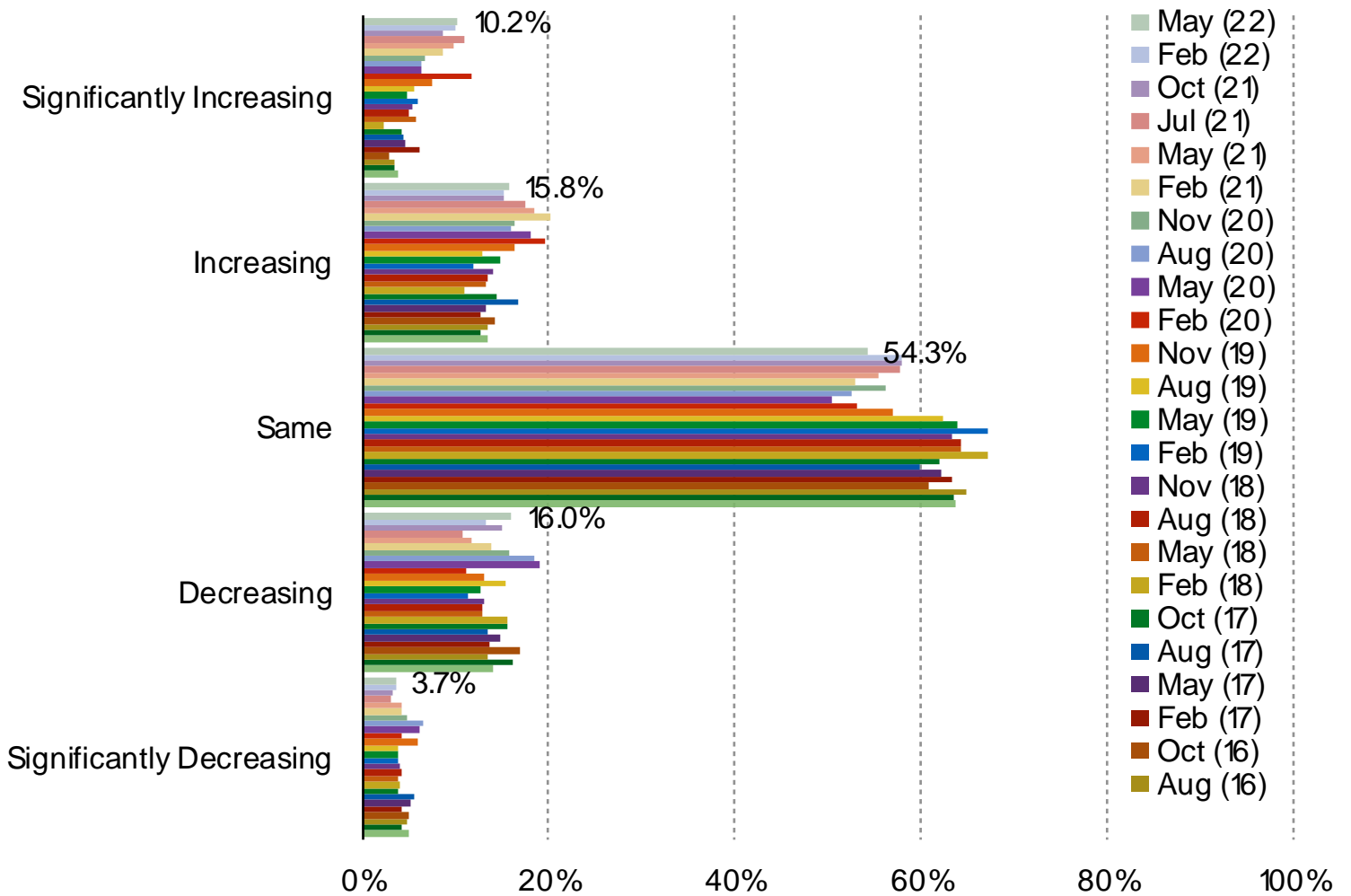
WAL-MART CUSTOMERS: IS AMAZON IMPACTING YOUR SHOPPING AT WAL-MART?

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



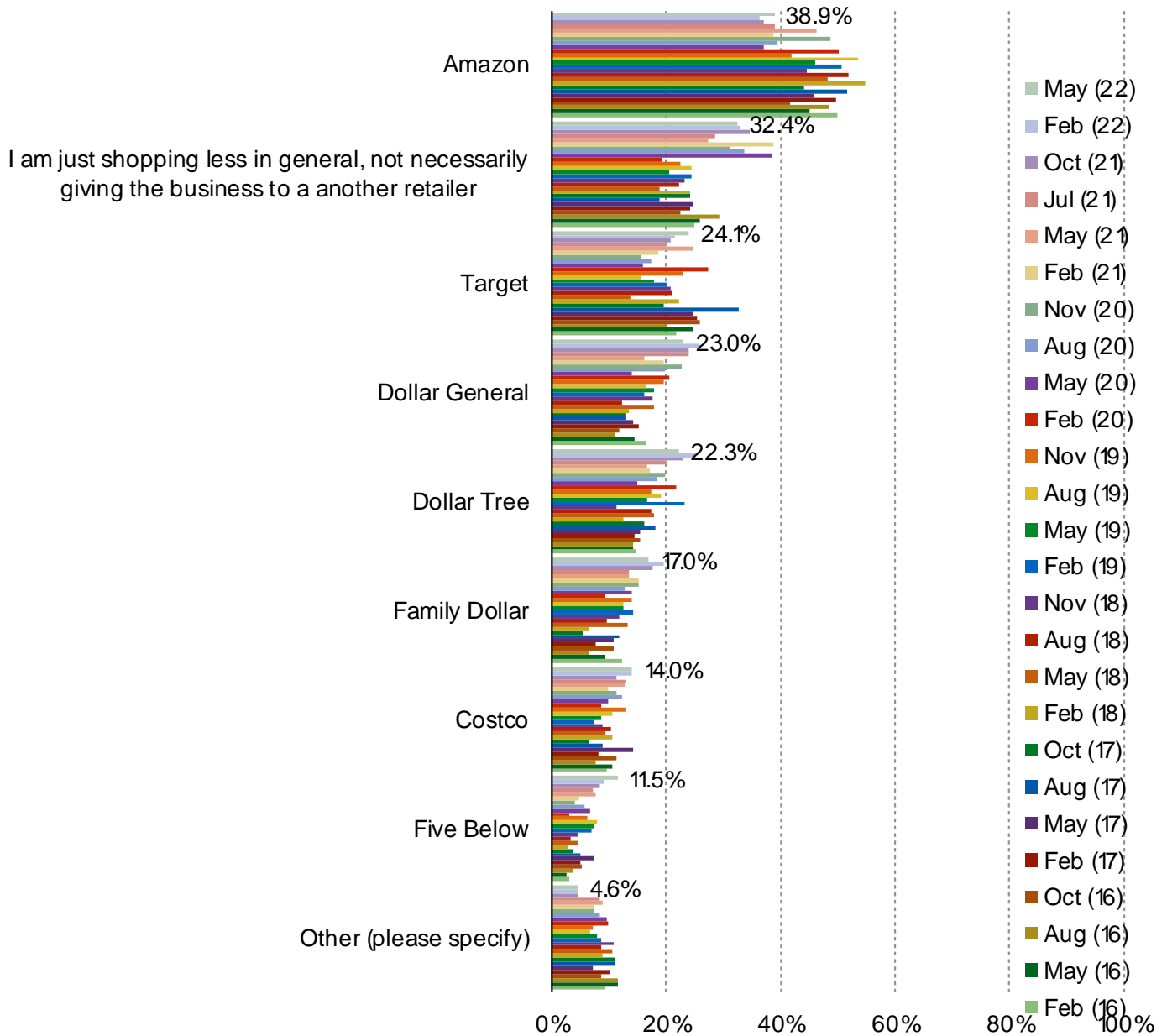
WAL-MART CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY

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



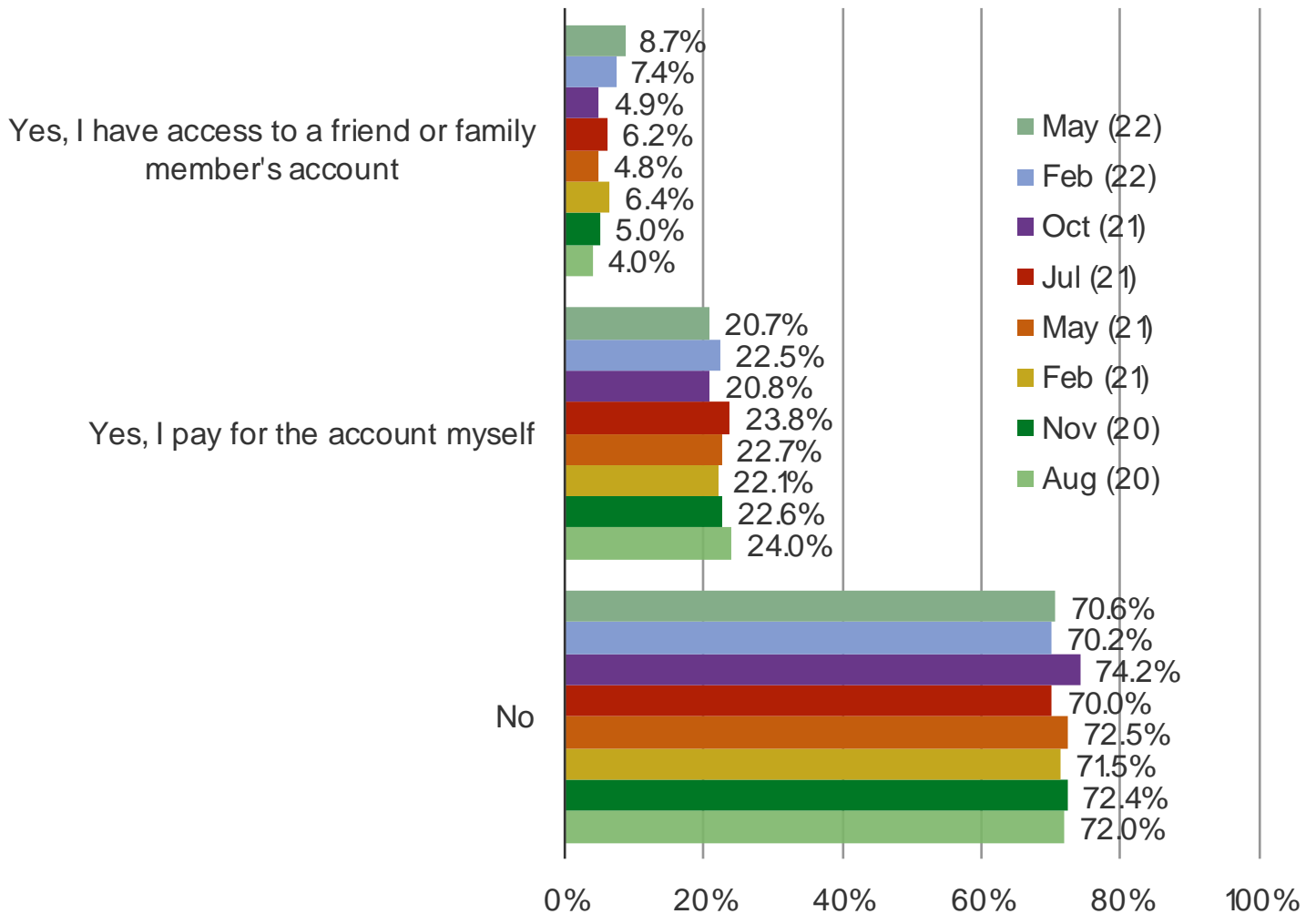
SINCE YOU ARE SHOPPING LESS AT WAL-MART, ARE YOU GIVING THAT BUSINESS TO ANY OF THE FOLLOWING RETAILERS INSTEAD?

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.

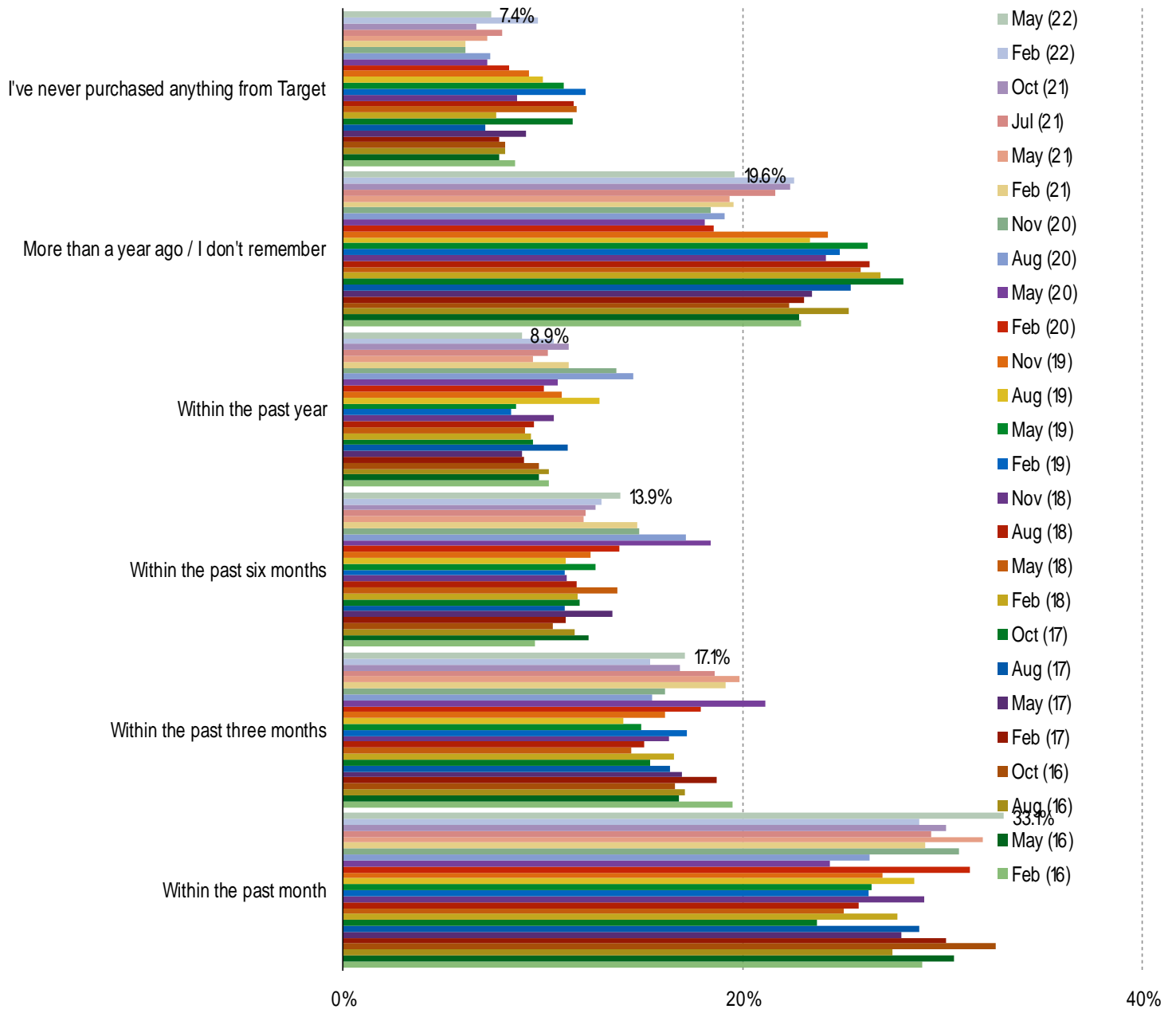


## TARGET DEEP DIVE



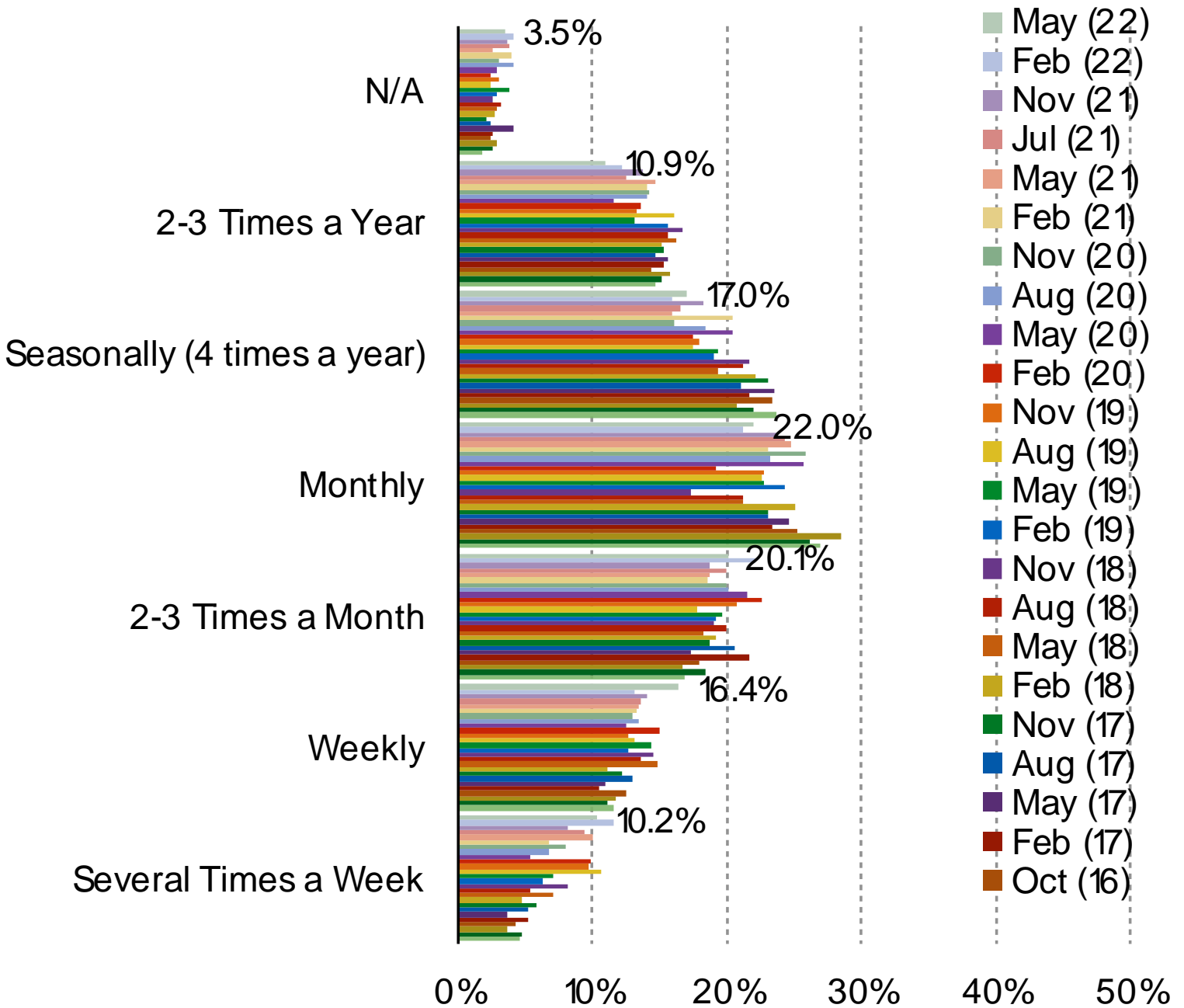
ALL CONSUMERS: LAST TIME PURCHASING FROM TARGET

This question was posed to all consumers.



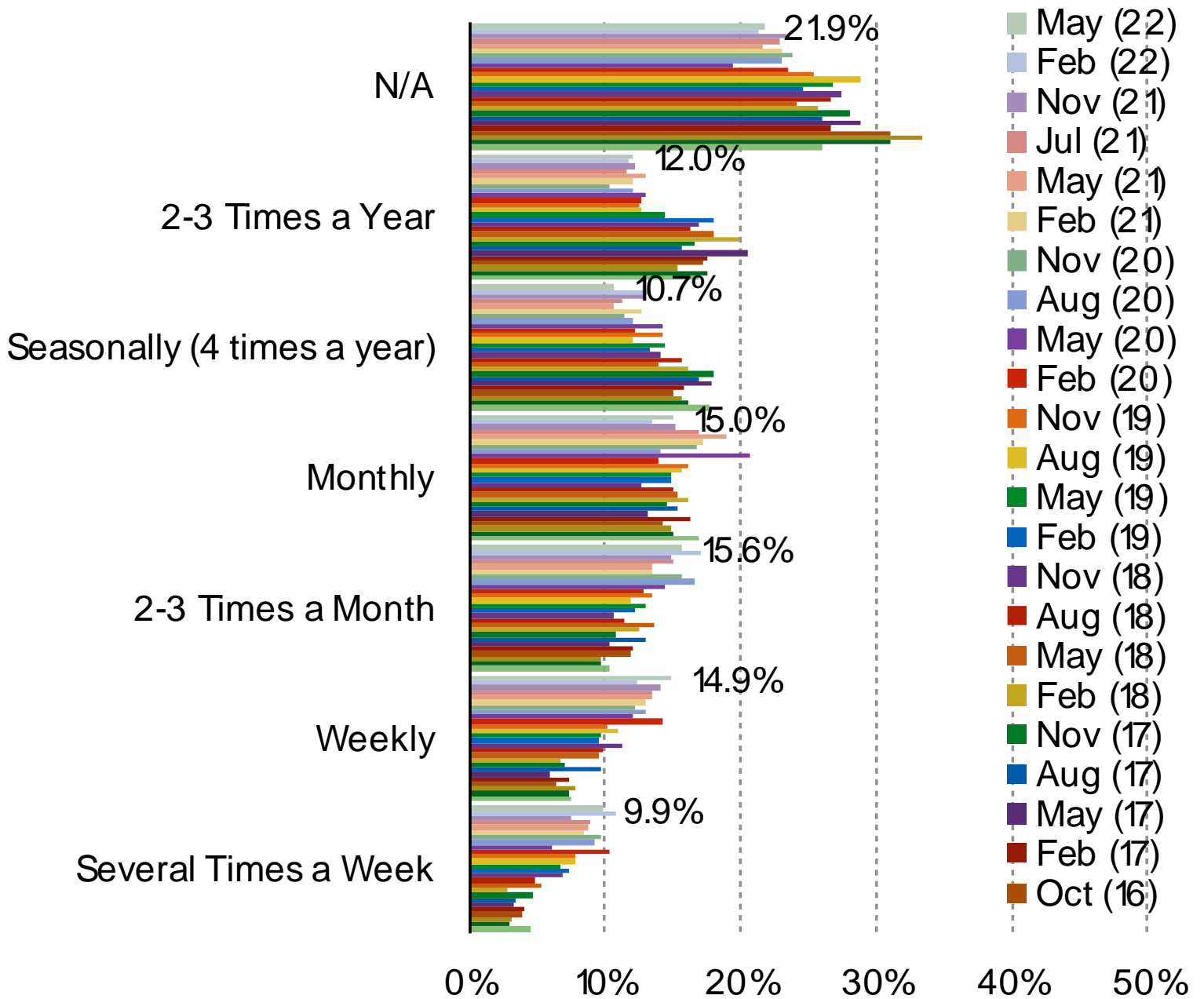
TARGET CUSTOMERS: SHOPPING FREQUENCY IN-STORES AT TARGET

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



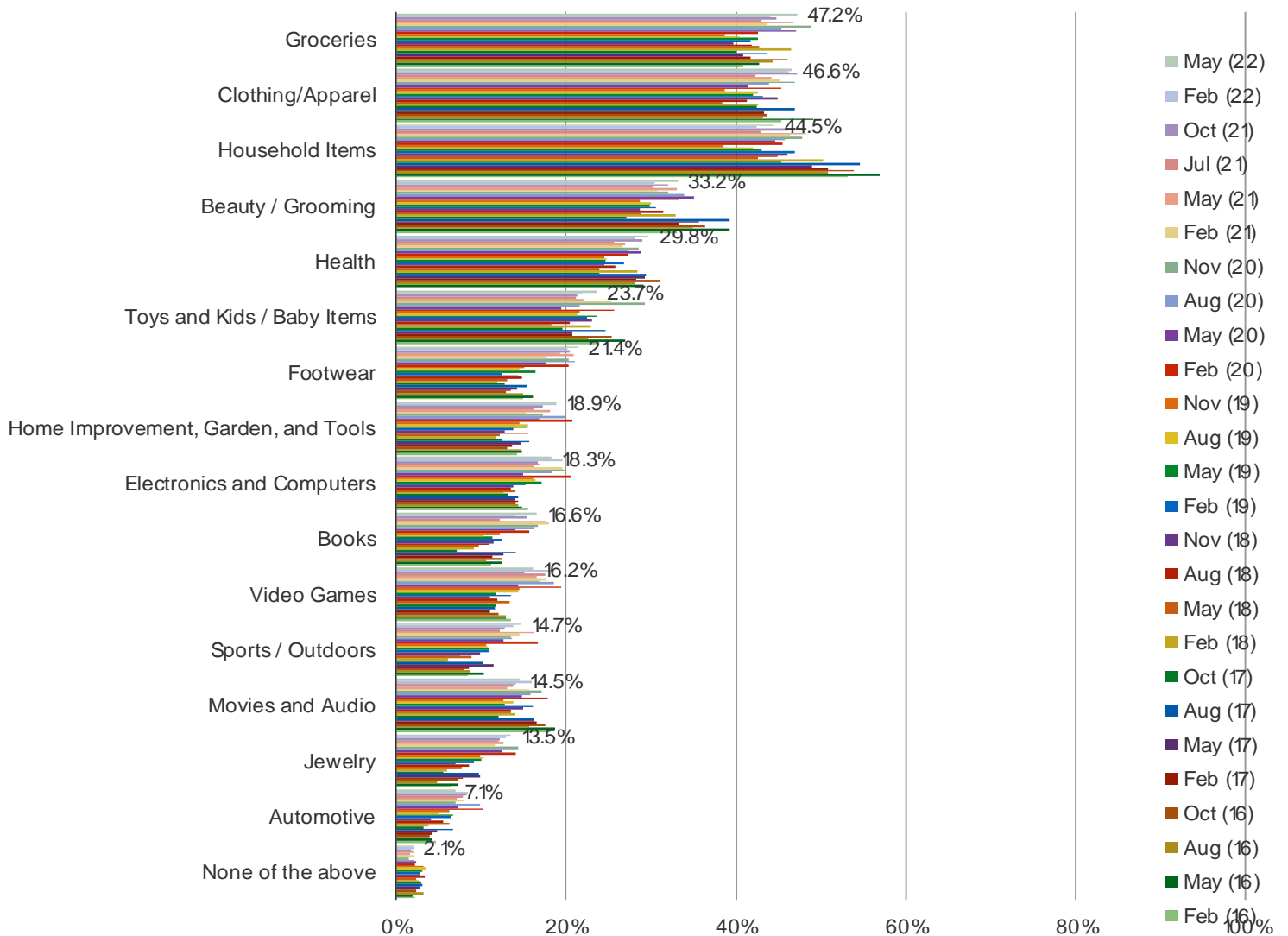
TARGET CUSTOMERS: SHOPPING FREQUENCY ONLINE AT TARGET

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



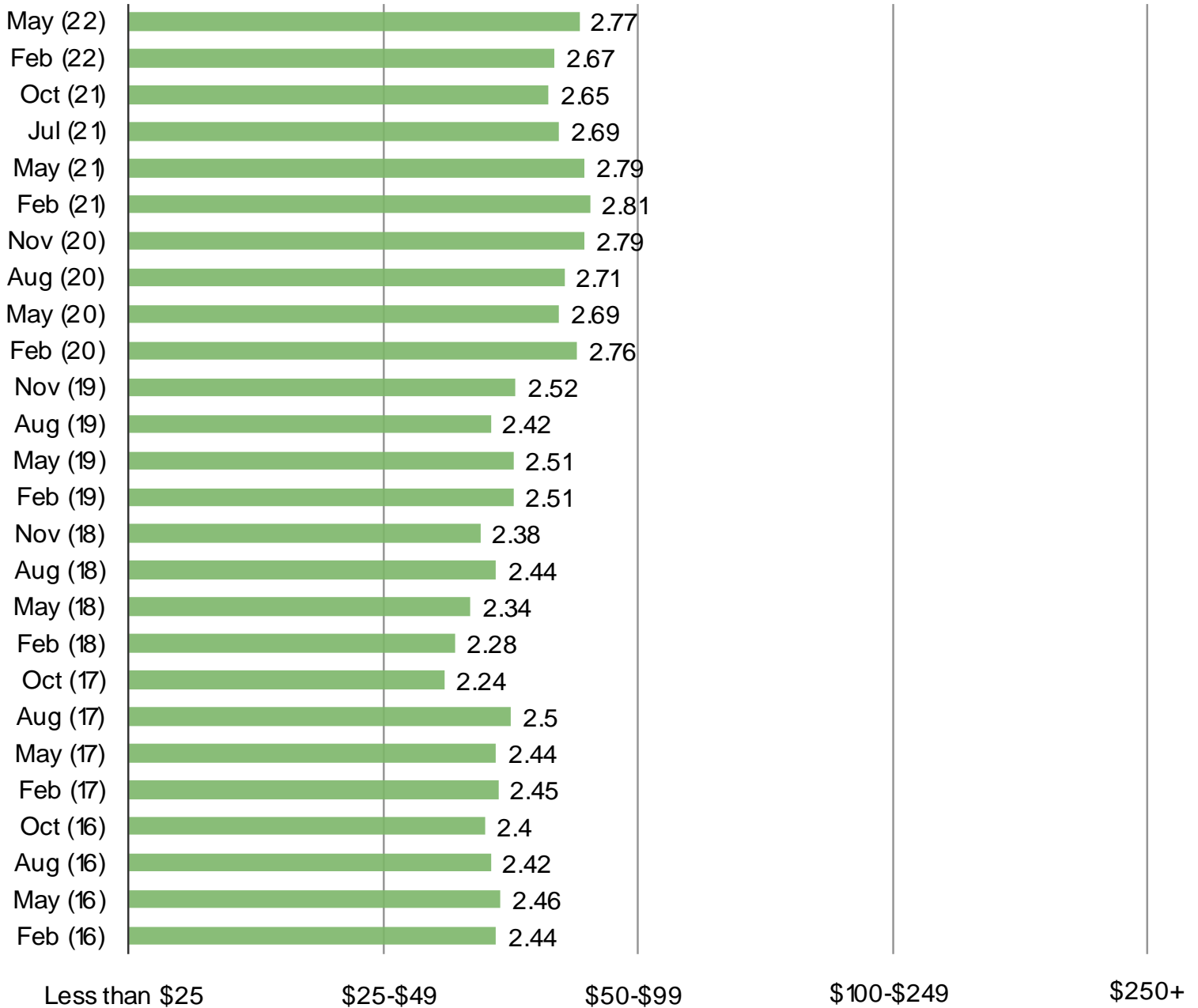
WHAT CUSTOMERS TYPICALLY BUY FROM TARGET (Q/Q TRACKING)

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



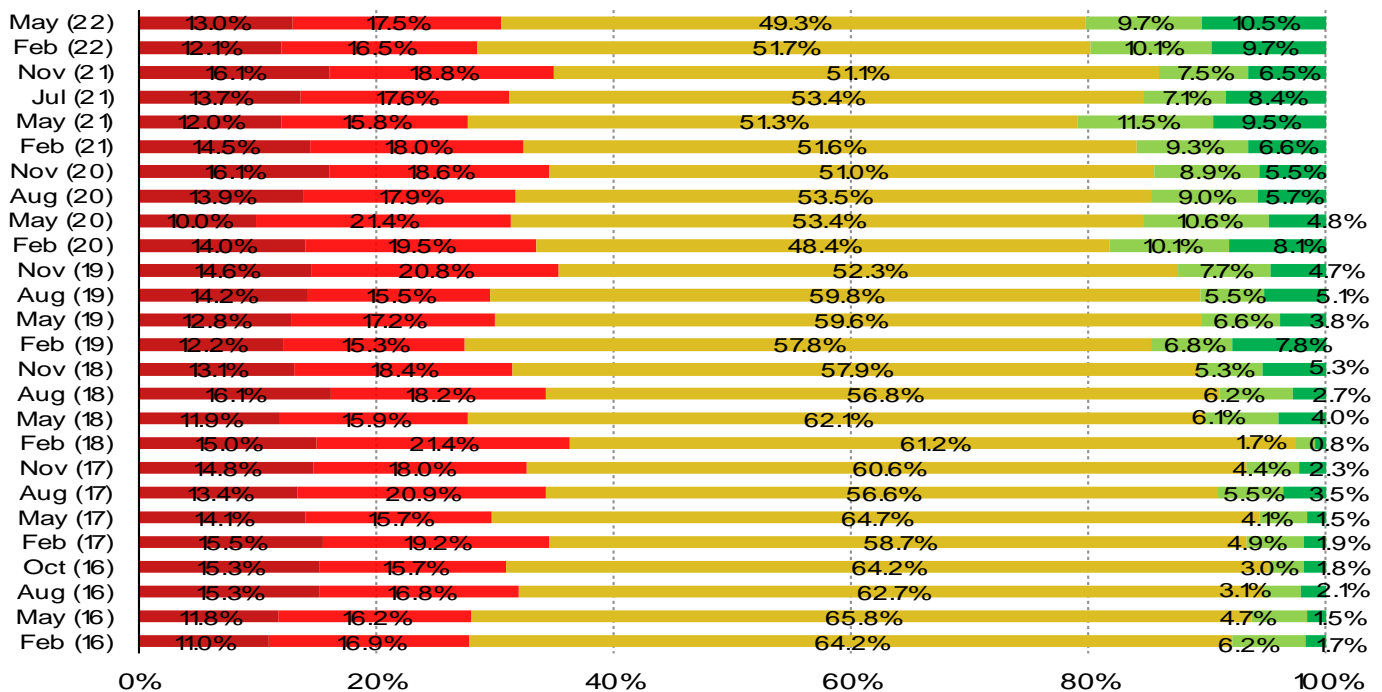
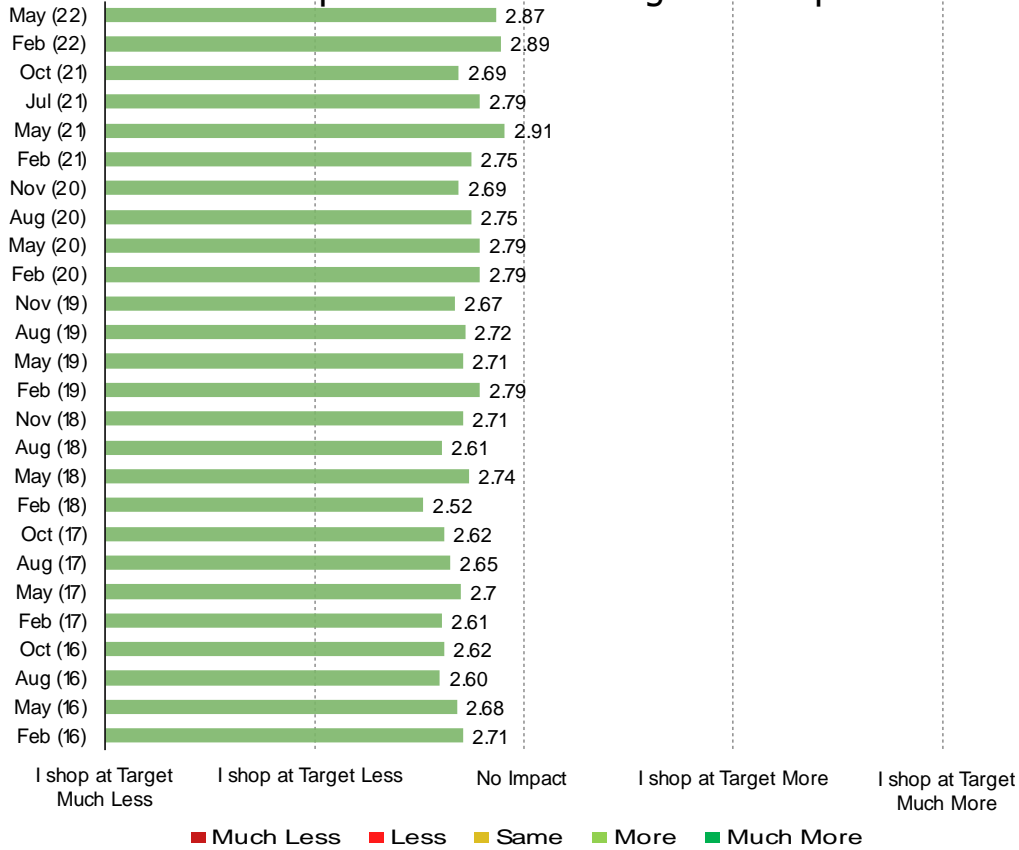
TARGET CUSTOMERS: AVERAGE SPEND PER VISIT

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



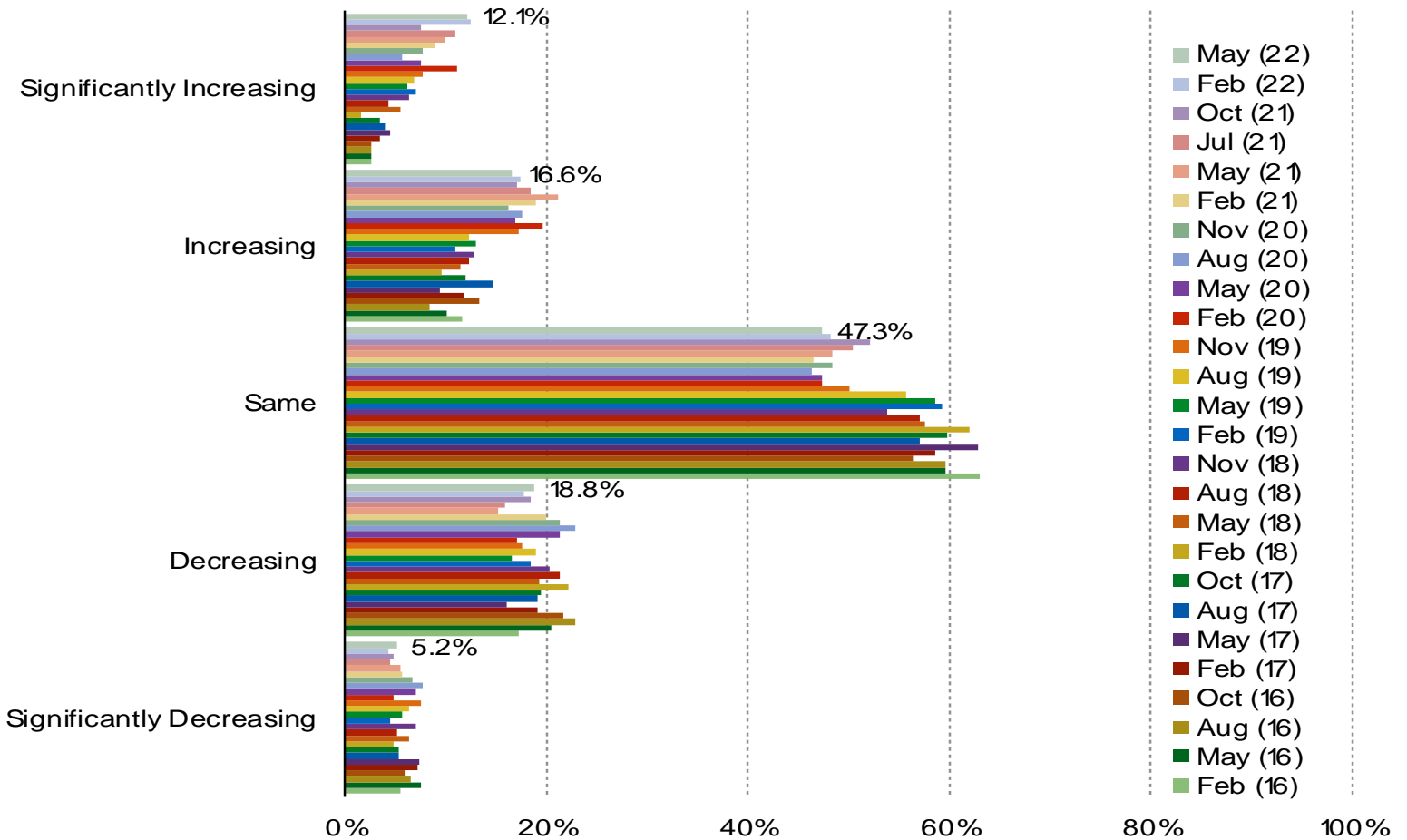
TARGET CUSTOMERS: IS AMAZON IMPACTING YOUR SHOPPING AT TARGET?

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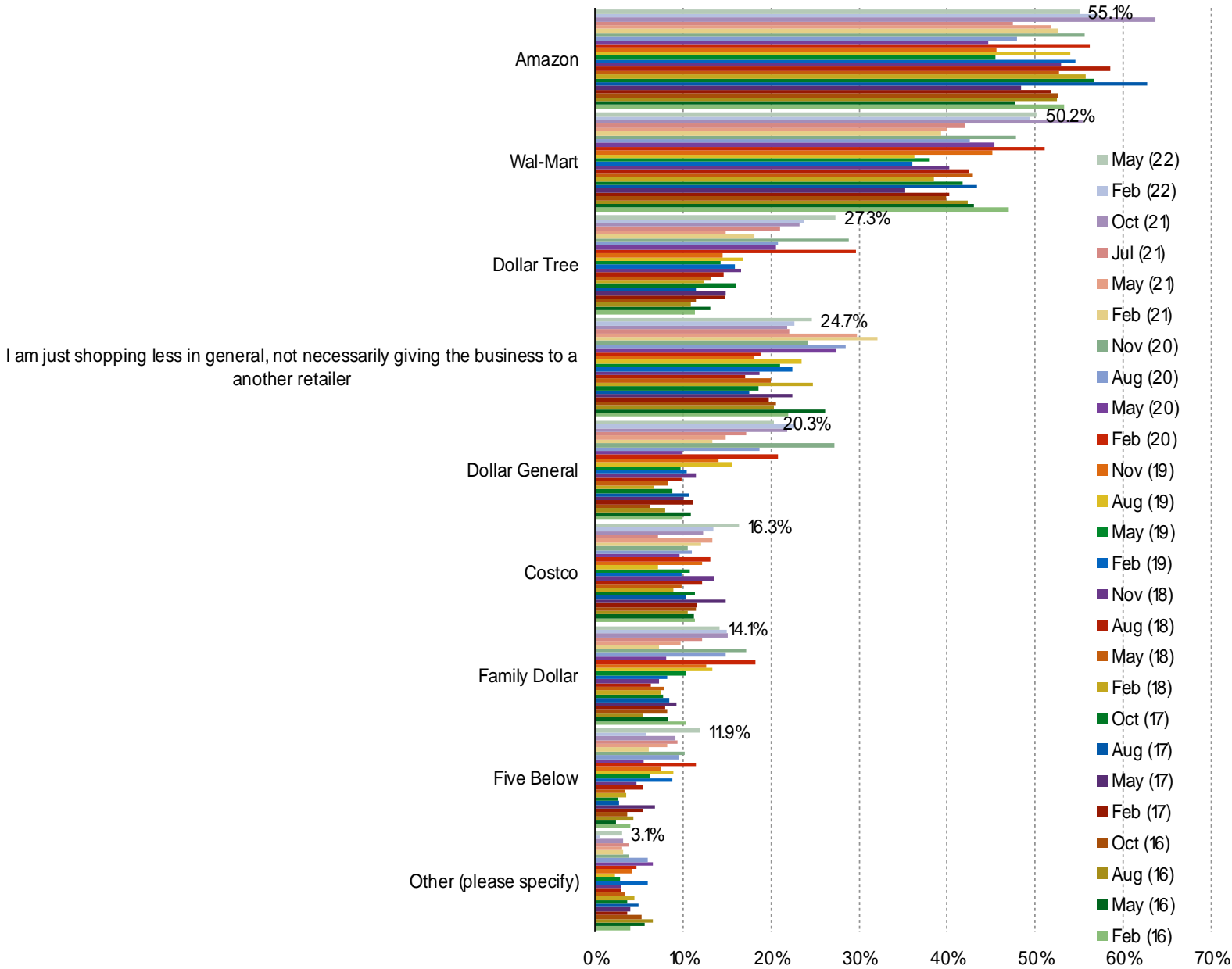
TARGET CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY

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.

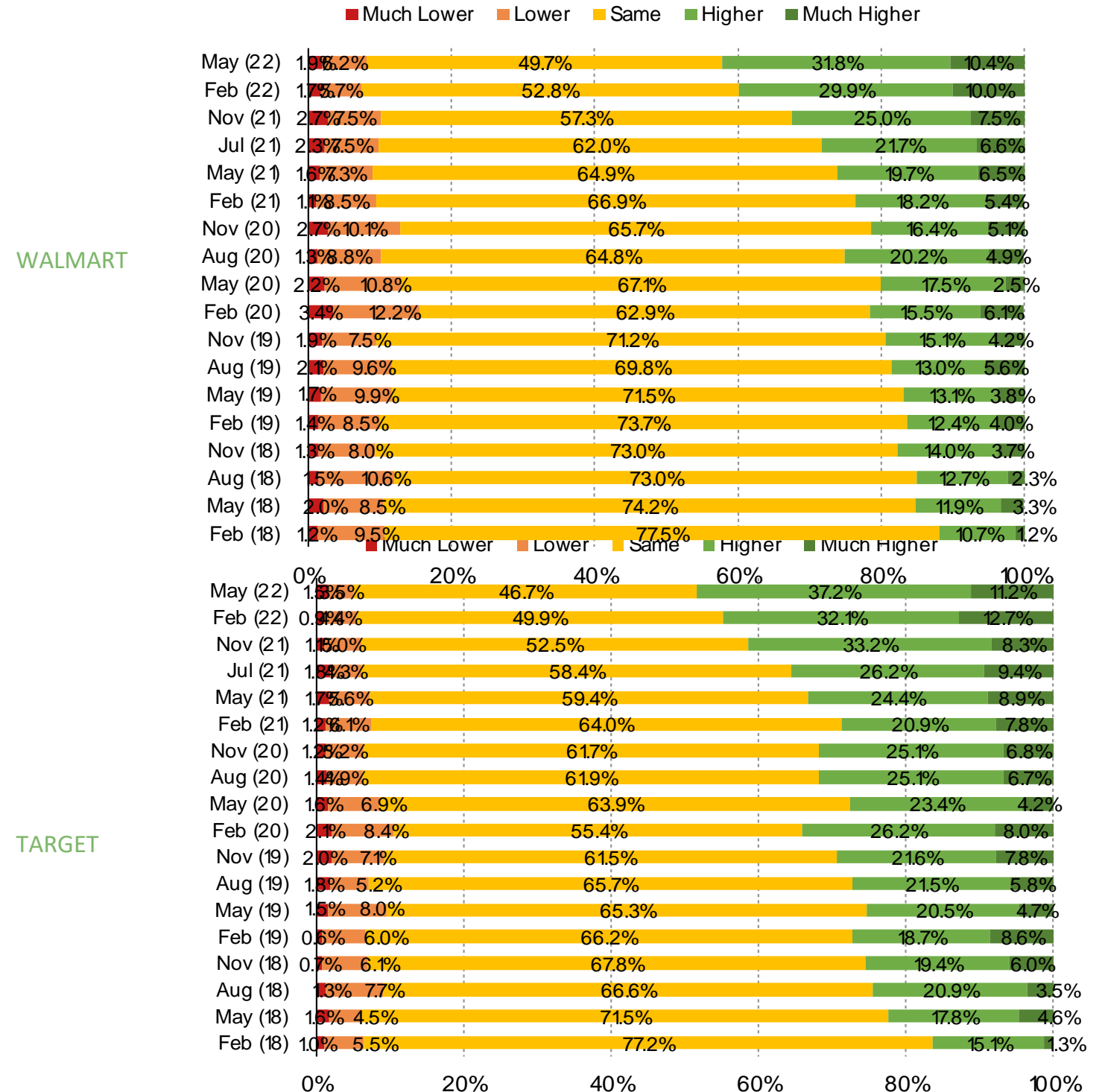




## SENTIMENT TOWARD PRICING

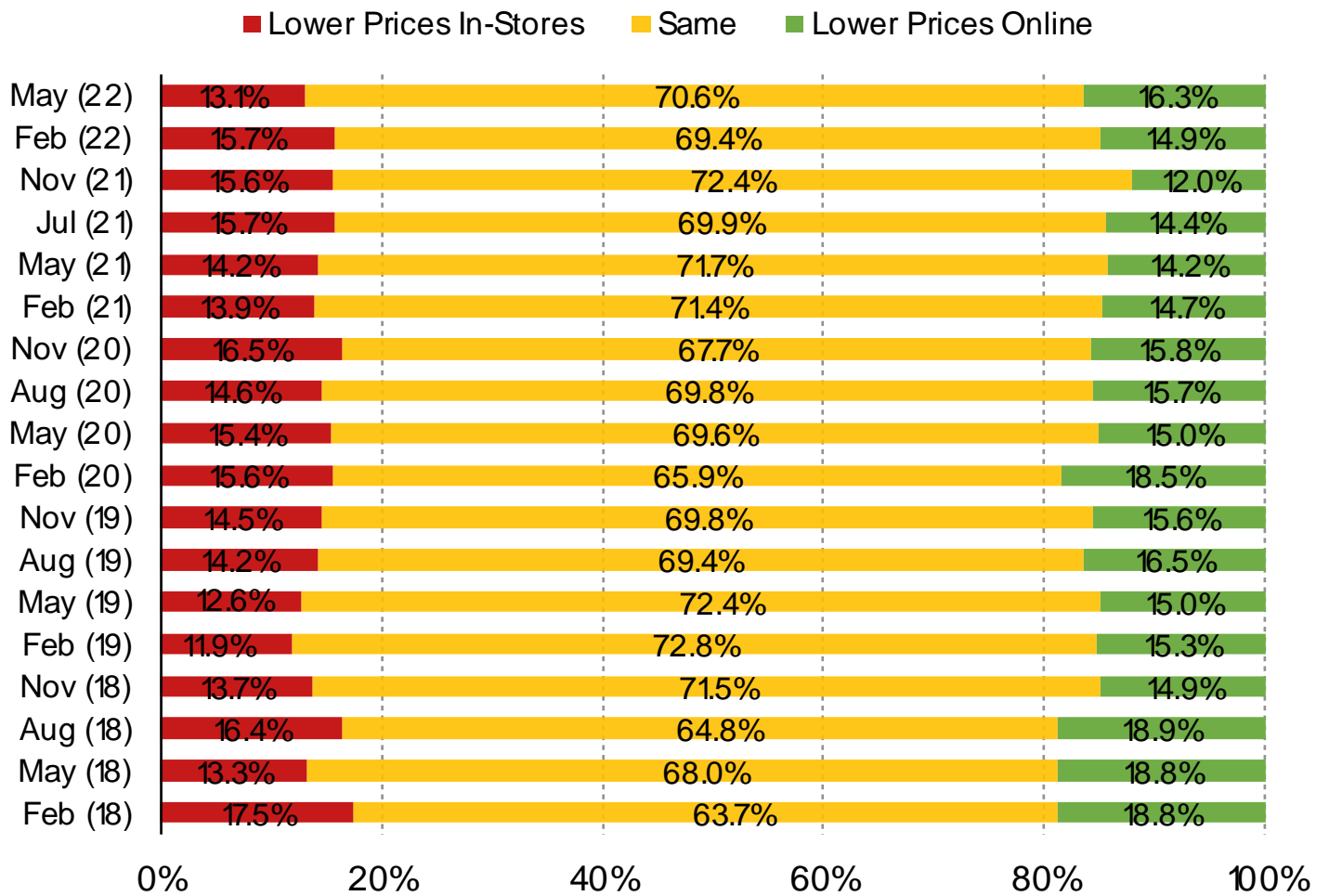
WHEN YOU LAST VISITED, DID YOU NOTICE ANY CHANGES TO PRODUCT PRICES?

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



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

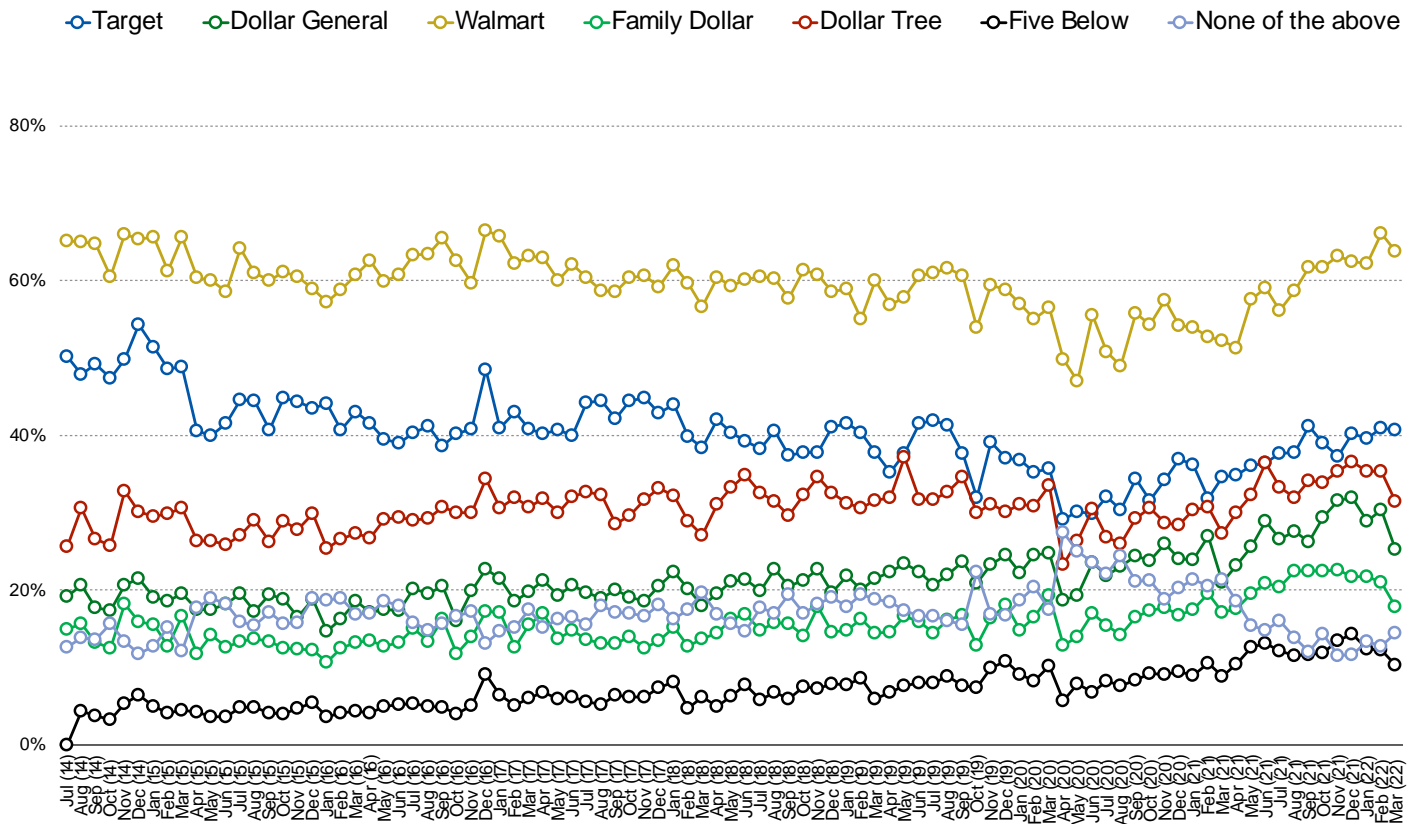
This question was posed to consumers who have shopped Wal-Mart online AND in-stores monthly or more frequently.



## MONTHLY TRACKERS

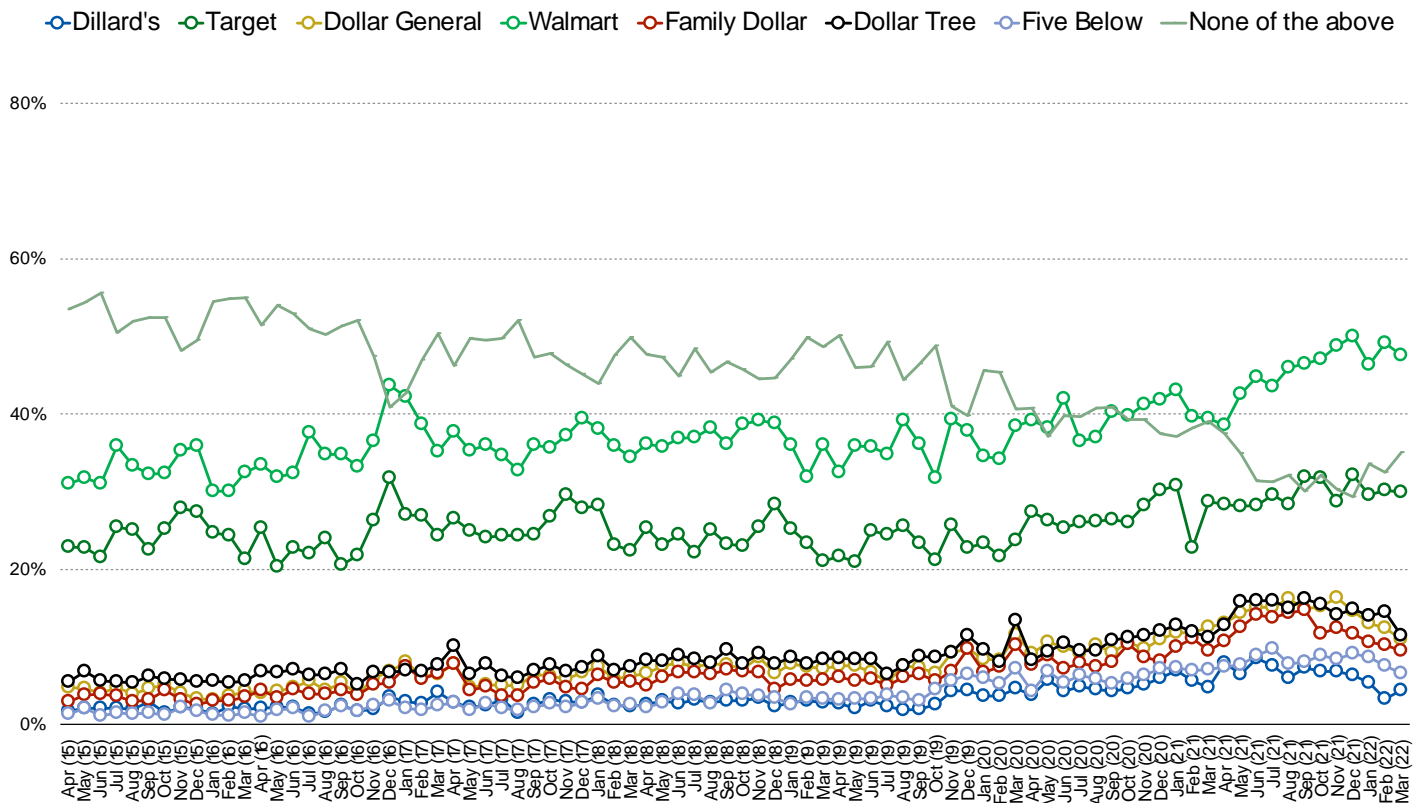
HAVE YOU VISITED ANY OF THE FOLLOWING COMPANY STORES IN THE PAST MONTH?

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.

