

BESPOKE SURVEYS

Low-Cost Retailers Vol 28

1,250+ US Consumers, Balanced to Census

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

November 2022

Consumer Traffic, Online Share, and Sentiment

IN-STORE EXPERIENCE

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

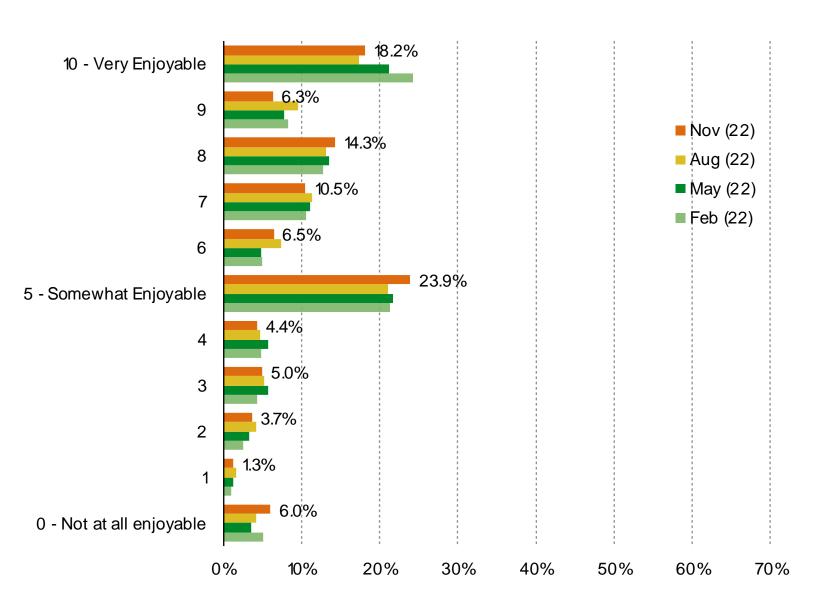
www.bespokeintel.com

Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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

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



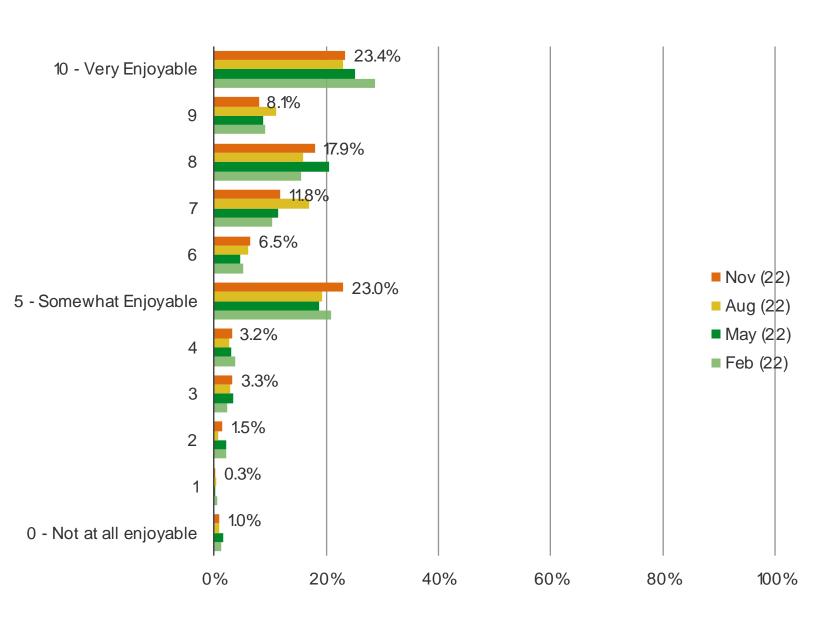
www.bespokeintel.com

Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

DO YOU FIND IT ENJOYABLE TO VISIT TARGET STORES?

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



Consumer Traffic, Online Share, and Sentiment

WAL-MART DEEP DIVE

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

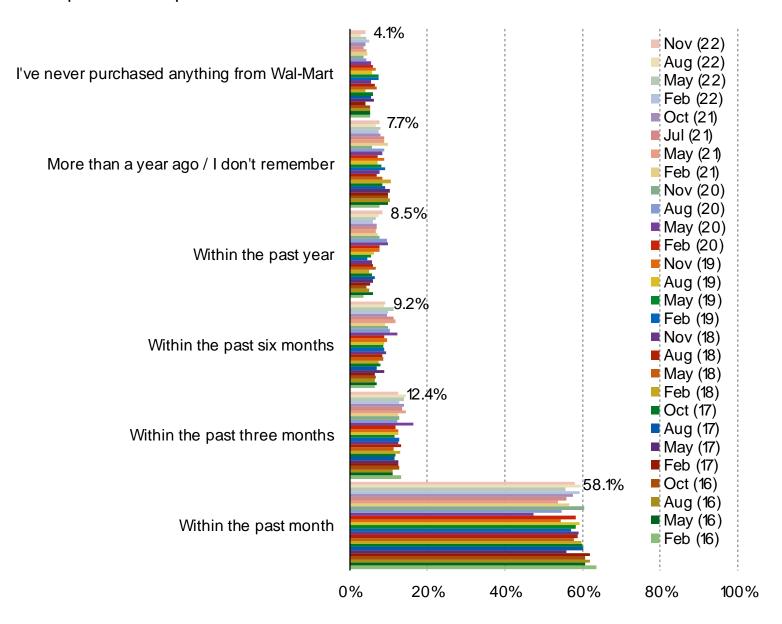
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

ALL CONSUMERS: LAST TIME PURCHASING FROM WAL-MART

This question was posed to all consumers.

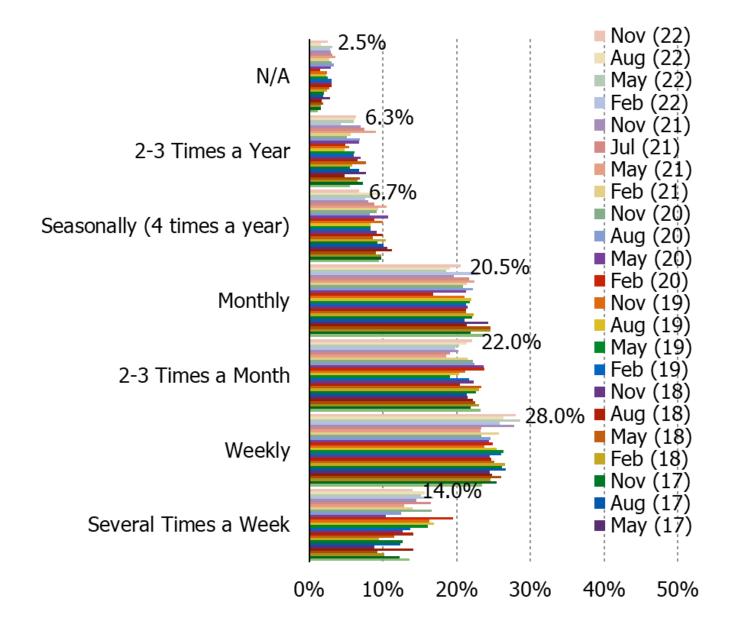


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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

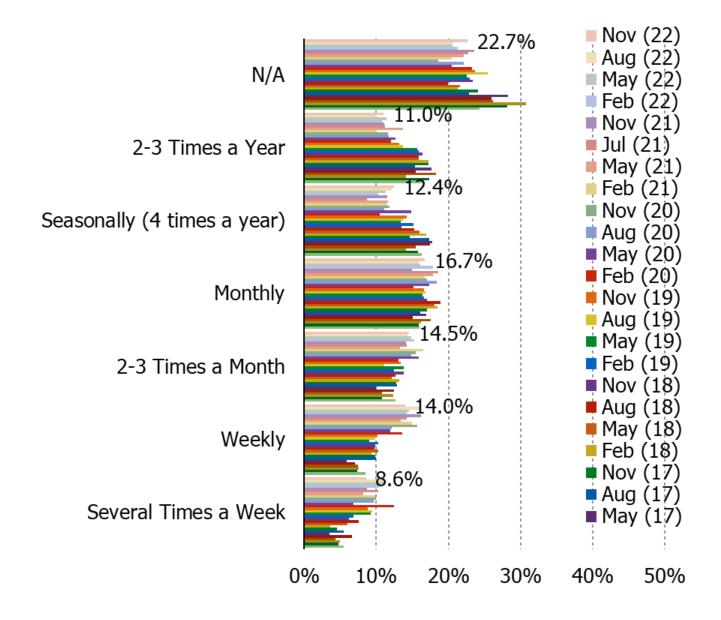


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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

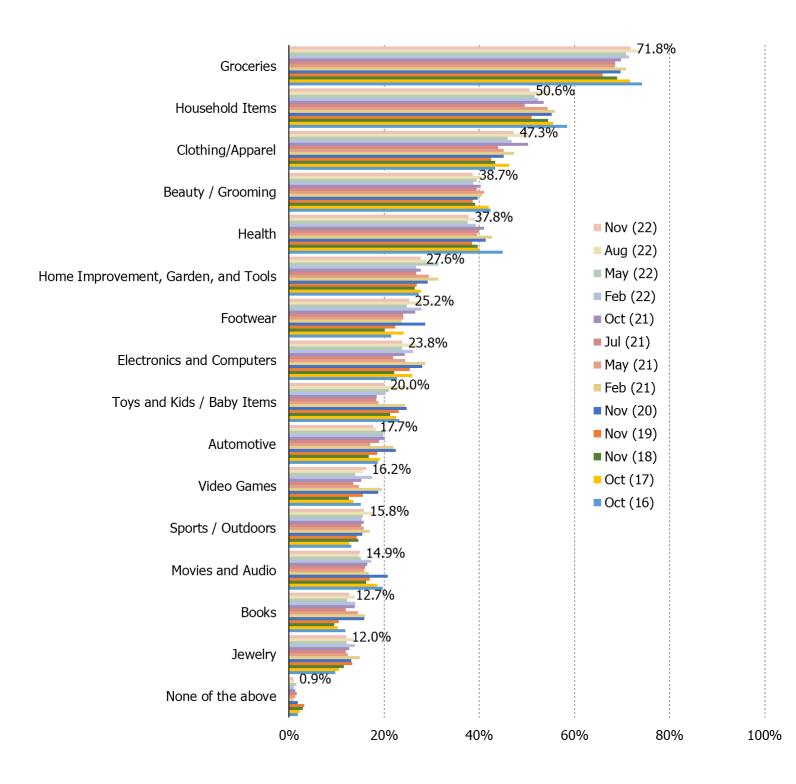


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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

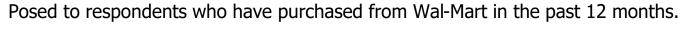


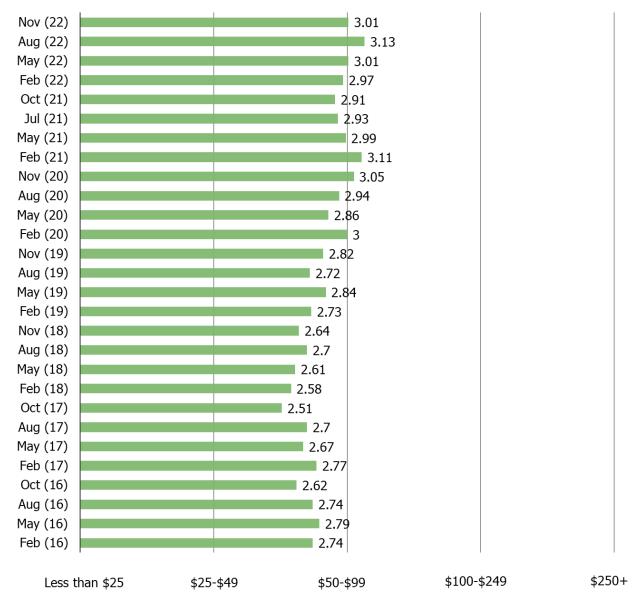
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

WAL-MART CUSTOMERS: AVERAGE SPEND PER VISIT





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Consumer Traffic, Online Share, and Sentiment

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

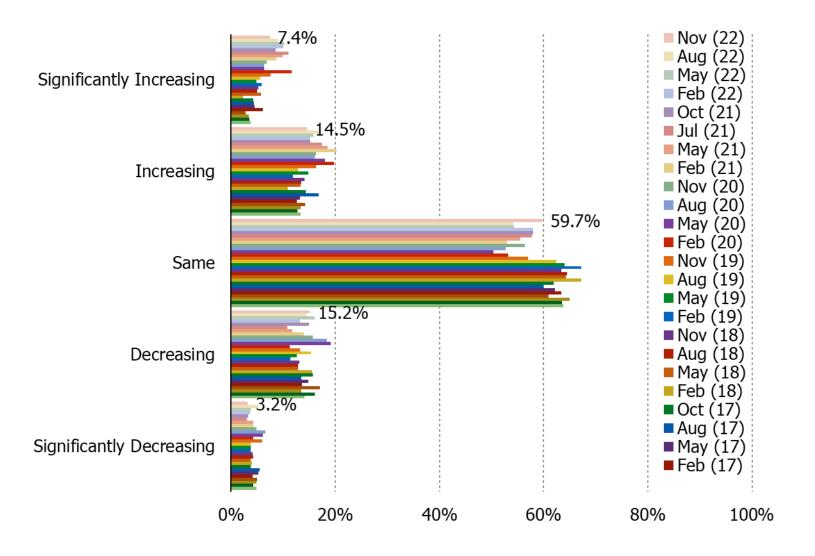
				1	
Nov (22)			2.82		
Aug (22)		1	2.82		
May (22)			2.92		
Feb (22)			2,91		
Oct (21)			2.83		
Jul (21)			2.87		
May (21)			2.93		
Feb (21)			2 9		
Nov (20)			2.78		
Aug (20)			2.81		
May (20)			2.82		
Feb (20)			2.85		
Nov (19)			2.79		
Aug (19)			2.79		
May (19)			2.82		
Feb (19)			2.88		
Nov (18)			2.8		
Aug (18) 💻			2.8		
May (18)		1	2.8		
Feb (18)			2.71		
Oct (17)			2.78		
Aug (17)			2.78		
May (17)			2.81		
Feb (17)			2.8		
Oct (16)			2.74		
Aug (16)			2.79		
May (16)			2.79		
Feb (16)			2.85		
I shop at V Much L		I shop at Walmar Less		I shop at Walmart More	I shop at Walmart Much More
			t No Impact		
	_ess	Less		More More Much More	Much More
	Less Nov (22)	Less		More More Much More 64.8%	Much More
	Less Nov (22) Aug (22)	Less	■ Less ■ Same	More More Much More 64.8% 61.3%	Much More 6.1% 6.1% 6.7% 6.2%
	Less Nov (22)	Less	Less Same	More More Much More 64.8%	Much More
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	Nov (22) Aug (22) May (22) Feb (22) Nov (21) Jul (21)	Less Much Less 10.8% 13.2% 10.9% 13.5%	Less ■Same	More More Much More 64.8% 61.3% 61.3% 63.2% 63.0%	Much More 6.1% 6.1% 6.7% 6.2% 7.1% 8.6% 7.3% 8.0% 6.3% 5.9% 5.9% 7.6%
	Nov (22) Aug (22) May (22) Feb (22) Nov (21) Jul (21) May (21)	Less Much Less 10.8% 13.2% 10.9% 13.5%	Less ■Same	More More Much More 64.8% 61.3% 51.3% 52.7% 63.2% 63.0% 2.7%	Much More 6.1% 6.1% 6.7% 6.2% 7.1% 8.6% 7.3% 8.0% 6.3% 5.9% 5.9% 7.6% 7.6% 8.3%
	Nov (22) Aug (22) May (22) Feb (22) Nov (21) Jul (21) May (21) Feb (21)	Less Much Less 10.8% 13.2% 10.9% 13.5%	Less ■Same	More ■ More ■ Much More 64.8% 61.3% 51.3% 52.7% 63.2% 63.0% 2.7% 63.1%	Much More 6.1% 6.1% 6.7% 6.2% 7.1% 8.6% 7.3% 8.6% 6.3% 5.9% 5.9% 7.6% 7.6% 8.3% 7.9% 6.5%
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	Nov (22) Aug (22) May (22) Feb (22) Nov (21) Jul (21) Feb (21) Nov (20) Aug (20) Feb (20) Nov (19) Aug (19) May (19) May (19) Nov (18) Aug (18) May (17) Feb (17) Aug (17) Feb (17) Oct (16) Aug (16)	Less Much Less 10.8% 13.2% 10.9% 14.9% 9.4% 13.5% 10.1% 11.9% 9.9% 13.7% 9.9% 13.7% 9.9% 13.9% 12.0% 14.4% 10.0% 15.2% 10.7% 15.2% 10.7% 15.2% 10.7% 15.2% 9.9% 14.9% 9.9% 15.3% 9.0% 14.9% 9.9% 15.4% 9.9% 13.5% 8.3% 13.5% 8.3% 13.5% 8.3% 12.3%	Less ■Same	More ■ More ■ Much More 64.8% 61.3% 61.3% 61.3% 51.3% 63.2% 63.2% 63.2% 63.2% 63.2% 63.1% 62.7% 62.7% 59.0% 64.3% 62.7% 59.0% 64.3% 68.6% 68.6% 68.6% 68.3% 68.6% 68.3% 69.1% 73.2% 73.5% 75.4% 74.5% 74.5%	Much More 6.1% 6.2% 7.1% 8.6% 7.3% 8.0% 6.3% 5.9% 7.6% 8.3% 7.9% 6.5% 6.4% 4.9% 8.0% 4.2% 8.5% 6.5% 5.8% 4.9% 8.5% 5.5% 5.5% 3.8% 5.5% 3.8% 5.5% 3.1% 2.6% 2.2% 4.0% 3.1% 2.6% 2.0% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.8% 2.7% 3.5% 2.

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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

WAL-MART CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY



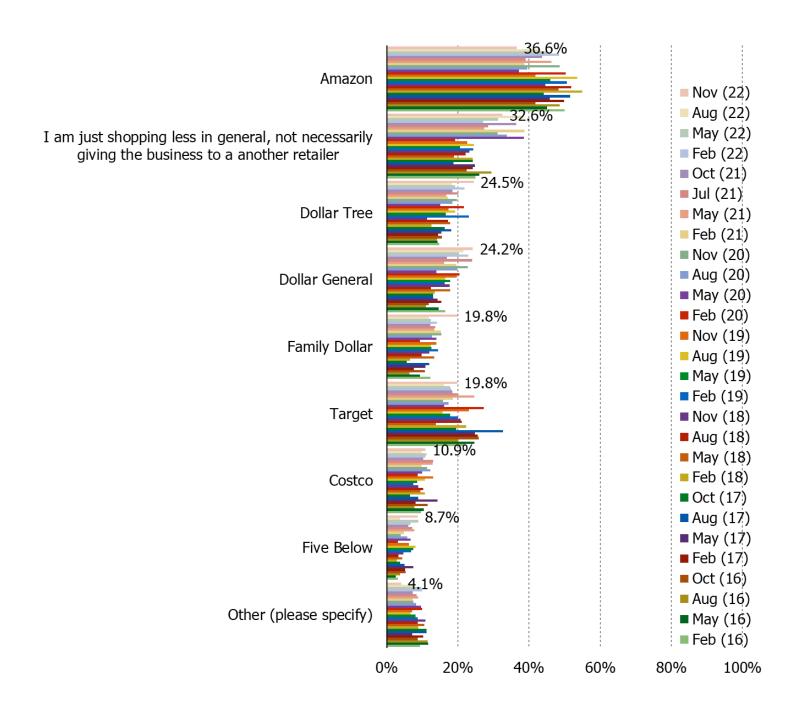
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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.

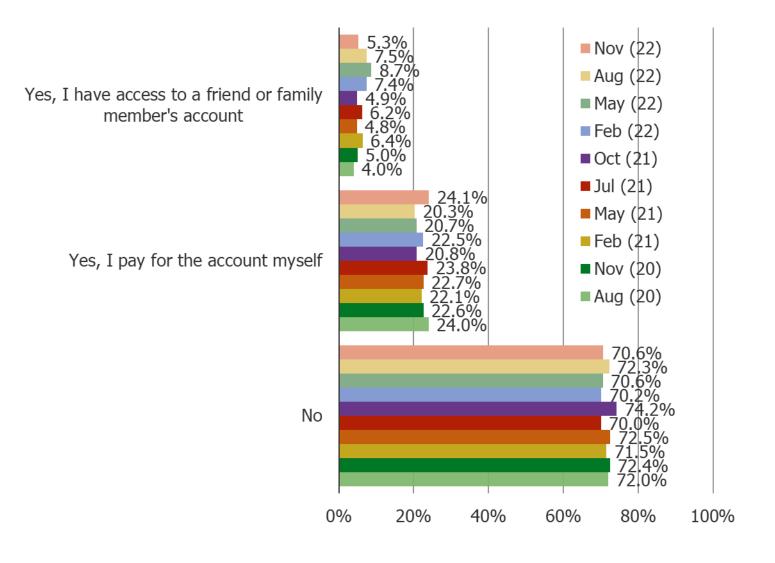


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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



Consumer Traffic, Online Share, and Sentiment

TARGET DEEP DIVE

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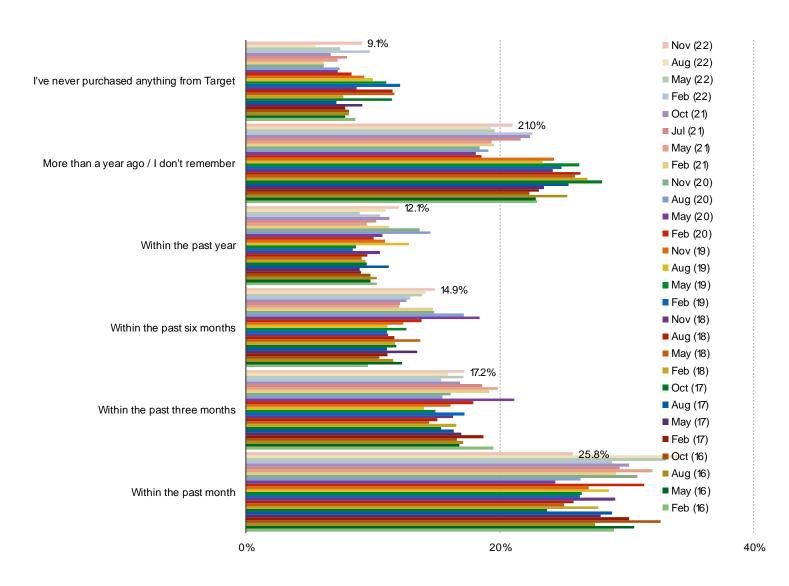
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

ALL CONSUMERS: LAST TIME PURCHASING FROM TARGET

This question was posed to all consumers.

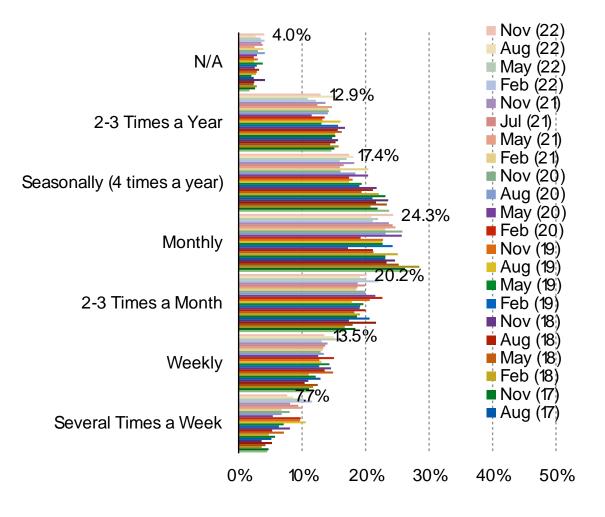


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

TARGET CUSTOMERS: SHOPPING FREQUENCY IN-STORES AT TARGET

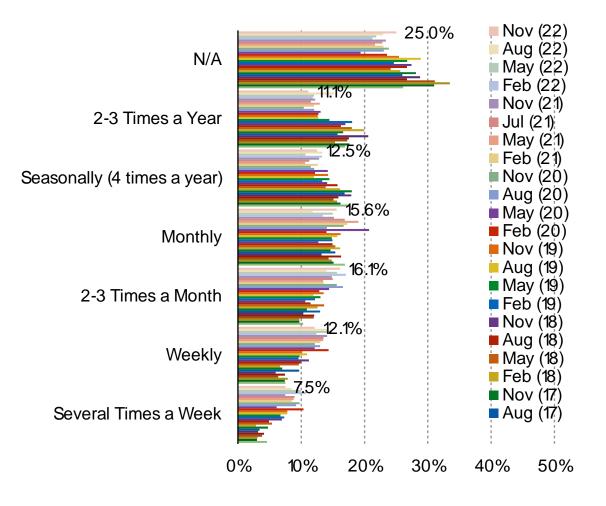


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

TARGET CUSTOMERS: SHOPPING FREQUENCY ONLINE AT TARGET

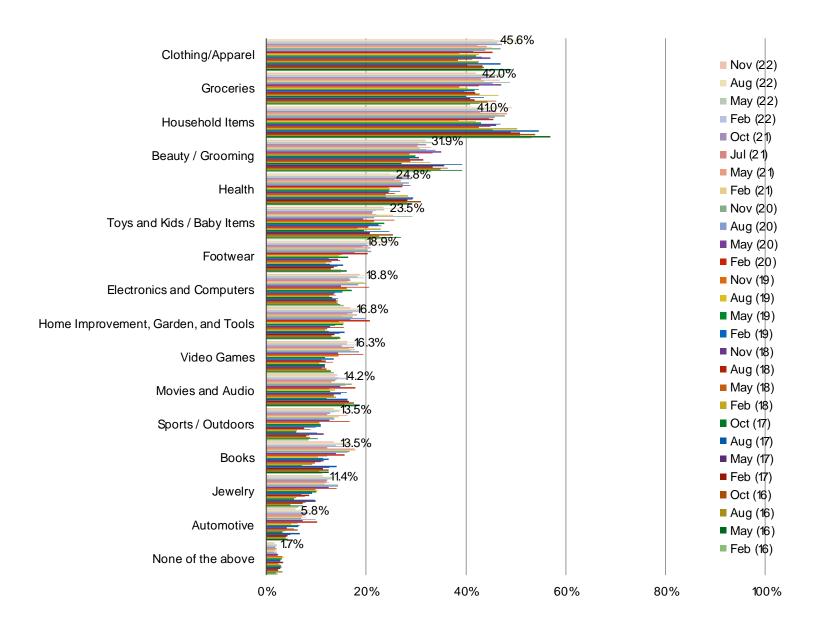


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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



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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

TARGET CUSTOMERS: AVERAGE SPEND PER VISIT



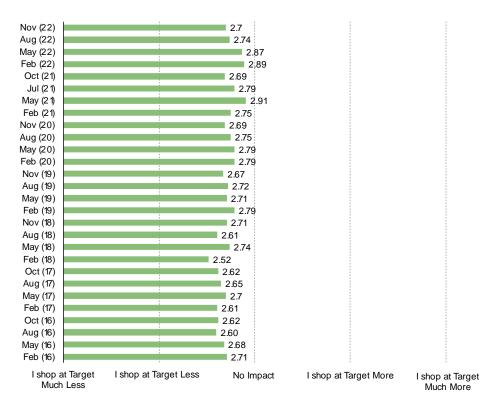
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

TARGET CUSTOMERS: IS AMAZON IMPACTING YOUR SHOPPING AT TARGET?

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



Much Less Less Same More Much More

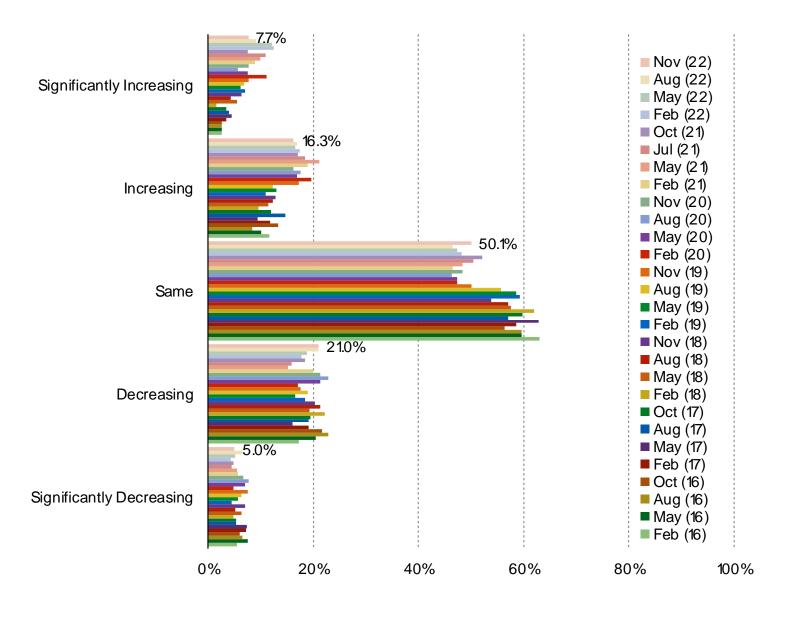
Nov (22)	16.0%	17.5%		52.6%		8.2% 5.7%
Aug (22)	16.3%	19.2%		46.9%	9.	5% 8.1%
May (22)	13.0%	17.5%		49.3%	9.7%	10.5%
Feb (22)	12.1%	16.5%		51.7%	10.19	6 9.7%
Nov (21)	16.1%	18.8%		51.1%		7.5% 6.5%
Jul (21)	13.7%	17.6%		53.4%		7.1% 8.4%
May (21)	12.0%	15.8%		51.3%	11.5%	9.5%
Feb (21)	14.5%	18.0%		51.6%		9.3% 6.6%
Nov (20)	16.1%	18.6%		51.0%		8.9% 5.5%
Aug (20)	13.9%	17.9%		53.5%		9.0% 5.7%
May (20)	10.0%	21.4%		53.4%		10.6% 4.8%
Feb (20)	14.0%	19.5%		48.4%	10	.1% 8.1%
Nov (19)	14.6%	20.8%		52.3%		7.7% 4.7%
Aug (19)	14.2%	15.5%		59.8%		5.5% 5.1%
May (19)	12.8%	17.2%		59.6%		6.6% 3.8%
Feb (19)	12.2%	15.3%		57.8%		6.8% 7.8%
Nov (18)	13.1%	18.4%		57,9%		5.3% 5.3%
Aug (18)	16.1%	18.2%		56.8%		6.2% 2.7%
May (18)	11.9%	15.9%		62.1%		6.1% 4 .0%
Feb (18)	15.0%	21.4%		61.2%		1.7% 0.8%
Nov (17)	14.8%	18.0%		60.6%		4.4% 2.3%
Aug (17)	13.4%	20.9%		56.6%		5.5%3 5%
May (17)	14.1%	15.7%		64.7%		4.1% 1.5%
Feb (17)	15.5%	19.2%		58.7%		4.9%
Oct (16)	15.3%	15.7%		64.2%		3.0% 1 .8%
Aug (16)	15.3%	16.8%		62.7%		3.1% 2.1%
May (16)	11.8%	16.2%		65.8%		4.7% 1 5%
Feb (16)	11.0%	16.9%		64,2%		6.2% 1.7%
0	%	20%	40%	60%	80%	100%

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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

TARGET CUSTOMERS: CHANGES IN RECENT SHOPPING FREQUENCY



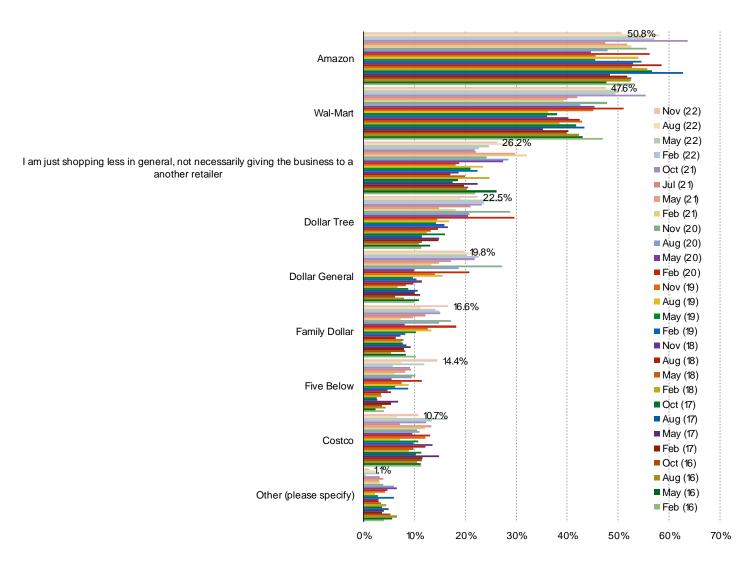
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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.



Consumer Traffic, Online Share, and Sentiment

SENTIMENT TOWARD PRICING

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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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.

			ounic	- mgner	_ nach nigi		
Nov (22)	1.8%9.0%	53.39	6		29.0	%	6.9%
	1.4%3%	47.8%			33.2%		0.4%
	1.9%2%	49.7%			31.8%		0.4%
	1.75%7%	52.8%			29.9%		0.0%
Nov (21)	2 7%.5%	57.3	%		25.	0%	7.5%
Jul (21)	2. 3%.5%	62	.0%		2	1.7%	6.6%
May (21)	1.6%3%	64	.9%			19.7%	6.5%
	1.1%3.5%	6	6.9%			18.2%	5.4%
Nov (20)	27%10.1%		65.7%			16.4%	5.1%
Aug (20)	1.3%8.8%	6	4.8%			20.2%	4.9%
May (20)	2.2% 10.8%		67.1%			17.5%	6 2.5%
Feb (20)	3.4% 12.2%	6	62.9%			15.5%	6.1%
Nov (19)	1.9% 7.5%		71.2%			15.1%	4.2%
Aug (19)	2.1% 9.6%		69.8%			13.0%	5.6%
1ay (19)	1.7% 9.9%		71.5%			13.19	% 3 .8%
eb (19)	1.4% 8.5%		73.7%			12.4	% 4.0%
Nov (18)	1.3% 8.0%		73.0%			14.09	6 3.7%
Aug (18)	1.5% 10.6%		73.0%			12.7	7% 2.3
May (18)	2.0% 8.5%		74.2%			11.9	% 3.3
Feb (18)	1. <mark>2% 9.5%</mark>		77.59	/o		10	0.7%1.2
	0%	20% 40	%	60%	80)%	1009

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

WALMART

Much Lower Lower Same Higher Much Higher

Nov (22)	1.55%0%	44.2%		3	9.6%	9.6%
Aug (22)	0.6%3%	43.0%		42	.1%	10.5%
May (22)	1.53%5%	46.7%		3	7.2%	11.2%
Feb (22)	0.94%4%	49.9%			32.1%	12.7%
Nov (21)	1.15%0%	52.5%			33.2%	8.3%
Jul (21)	1.84/3%	58.4%			26.2%	9.4%
May (21)	1.7%5.6%	59.4	%		24.4%	8.9%
Feb (21)	1.2%6.1%	64	.0%		20.99	% 7.8%
Nov (20)	1.25%2%	61.79	%		25.1%	6.8%
Aug (20)	1.4%%9%	61.9	%		25.1%	6.7%
May (20)	1.6% 6.9%	6	3.9%		23	.4% 4.2%
Feb (20)	2.1% 8.4%	55.4	4%		26.2%	8.0%
Nov (19)	20% 7.1%	6	1.5%		21.6%	6 7.8%
Aug (19)	1.8% 5.2%	65	5.7%		21.	5% 5.8%
May (19)	1.5% 8.0%		65.3%		20	0.5% 4.7%
Feb (19)	0.6% 6.0%	66	.2%		18.79	% 8.6%
Nov (18)	0.7% 6.1%	6	7.8%		19	.4% 6.0%
Aug (18)	1.3% 7.7%		66.6%		2	0.9% 3.5%
May (18)	1.6% 4.5%		71.5%			17.8% 4.6%
Feb (18)	1.0 <mark>% 5.5%</mark>		77.2%			15.1% 1.3%
	0%	20% 4	0%	60%	80%	100%

TARGET

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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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.

		Lower Prices I	In-Stores Same	Lower Price	s Online	
Nov (22)	15.9%		68.9%	6	1	5.2%
Aug (22)	14.4%		69.1%		10	6.5%
May (22)	13.1%		70.6%		10	6.3%
Feb (22)	15.7%		69.4%	6	1	4.9%
Nov (21)	15.6%		72.4	%		12.0%
Jul (21)	15.7%		69.99	6		14.4%
May (21)	14.2%		71.7%	0		14.2%
Feb (21)	13.9%		71.4%)		4.7%
Nov (20)	16.5%		67.7%	0	1	5.8%
Aug (20)	14.6%		69.8%		1	5.7%
May (20)	15.4%		69.6%	0	1	5.0%
Feb (20)	15.6%		65.9%		18	.5%
Nov (19)	14.5%		69.8%		1	5.6%
Aug (19)	14.2%		69.4%		10	6.5%
May (19)	12.6%		72.49	/o	1	5.0%
Feb (19)	11.9%		72.8%		1	5.3%
Nov (18)	13.7%		71.5%	6	1	4.9%
Aug (18)	16.4%		64.8%	6	18	.9%
May (18)	13.3%		68.0%		18	.8%
Feb (18)	17.5%		63.7		18	.8%
C)%	20%	40%	60%	80%	100%

Consumer Traffic, Online Share, and Sentiment

MONTHLY TRACKERS

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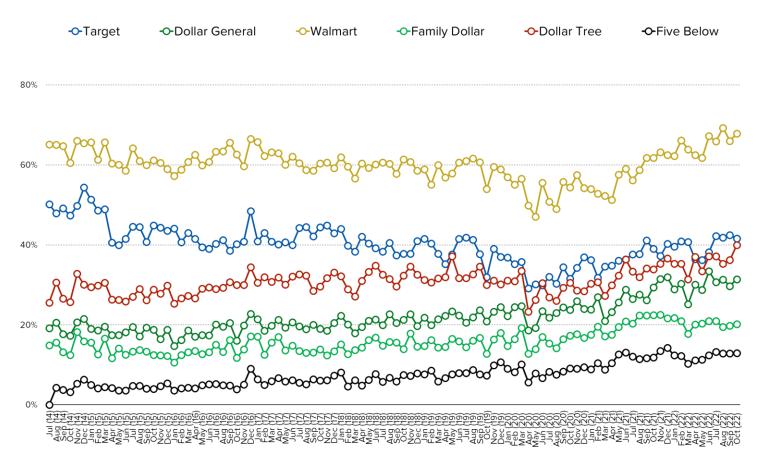
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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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

This question was posed to all respondents.

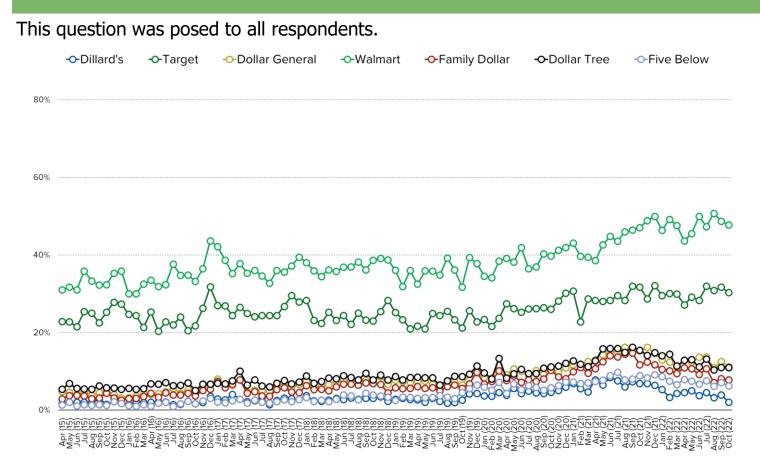


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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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



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Consumer Traffic, Online Share, and Sentiment

Audience: 1,250 US Consumers Date: November 2022

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.

	-O-Dillard's	-O-Target	Dollar General	- O- Walmart		- 0- Dollar Tree	-O-Five Below
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