

## Cross-Shopping Prevalent for Key Holiday Purchases

### *Discounts and Promotions Make Shoppers Buy at More Retailer Categories*

The following highlights about cross-shopping at apparel, beauty aids and electronics retailers are based on a representative sample of 1,016 adults in the U.S., which was conducted between October 9 and 11, 2017 by ORC International on behalf of ICSC.

#### **SECTION A: SHOPPING AT DIFFERENT RETAILER FORMATS (p.2)**

- On average, shoppers who purchase apparel do so from 5.1 different retailer types. *Apparel* shoppers at luxury/very high-end retailers are the most likely to purchase from other retailer formats (8.0 types), while discount department store shoppers are least likely (5.6 types). (*Chart 1*)
- Shoppers who purchase *beauty aids* do so from 4.6 different retailer types. Those buying from other specialty or fast fashion retailers purchase from the greatest number of other retailer formats (9.1 types), while discount department store shoppers buy from the fewest (5.5 types). (*Chart 1*)
- *Electronics* shoppers buy from 3.9 different retailer types, on average. Buyers at off-price retailers are the most likely to also purchase from other retailer formats (6.9 types). Discount department store and specialty electronics store shoppers purchase from the smallest number (4.5 types). (*Chart 1*)

#### **SECTION B: WHERE SHOPPERS PURCHASE APPAREL, BEAUTY AIDS AND ELECTRONICS (p.2)**

- Discount department stores (87%), off-price retailers (80%) and mid-price department stores (79%) are most popular among apparel shoppers. (*Chart 2*)
- Beauty-aids shoppers purchase most from discount department stores (74%), pharmacies (65%) and mid-price department stores (50%). (*Chart 3*)
- The largest shares of electronics shoppers buy at discount department stores (77%), specialty electronics retailers (77%) and Amazon/other pure online retailers (67%). (*Chart 4*)

#### **SECTION C: FREQUENCY OF MAKING PURCHASES (p.4)**

- Three-fifths (61%) of apparel shoppers make purchases in that category at least once per month. They buy from discount department stores and Amazon/other pure online retailers most often. (*Chart 5*)
- Slightly more than half (54%) of beauty aids shoppers buy those items at least once per month. A little over one-third (38%) buys them every few months. The retailer types where purchases are made most frequently include discount department stores and other specialty or fast-fashion retailers. (*Chart 5*)
- The majority of electronics shoppers (59%) purchase these items every few months. (*Chart 5*)
- For all types of goods, millennials make purchases more frequently than older shoppers. (*Chart 6*)

#### **SECTION D: BUYING GOODS IN STORES AND/OR ONLINE (p.5)**

- The largest share of apparel shoppers (58%) makes purchases in stores and online. Another 41% buys exclusively in stores, while the remaining 1% buys only online. (*Chart 7 and 8*)
- Greater amounts of beauty-aids shoppers (58%) buy in stores only, while 41% purchases in store and online. (*Charts 7 and 9*)
- About 42% of shoppers who buy electronics do so in store and more than half (56%) use both physical stores and the internet. A slightly higher share of this group (2%) compared with apparel and beauty-aids shoppers buys solely online. (*Charts 7 and 10*)
- Baby Boomers are more inclined to purchase in stores only, whereas more millennials buy in stores and online.

#### **SECTION E: OBTAINING ONLINE ORDERS (p.7)**

- More than four-fifths (84%) of apparel shoppers who buy online have their orders shipped home; however, a significant share (62%) also goes to stores to pick up their online purchases. (*Chart 11*)
- Roughly 83% of beauty aids shoppers who buy online have online orders shipped home, however two-thirds (66%) also go to stores to pick up their online purchases. (*Chart 11*)
- Nearly as many online electronics shoppers pick up the items in store (70%) as have them shipped home (76%). (*Chart 11*)

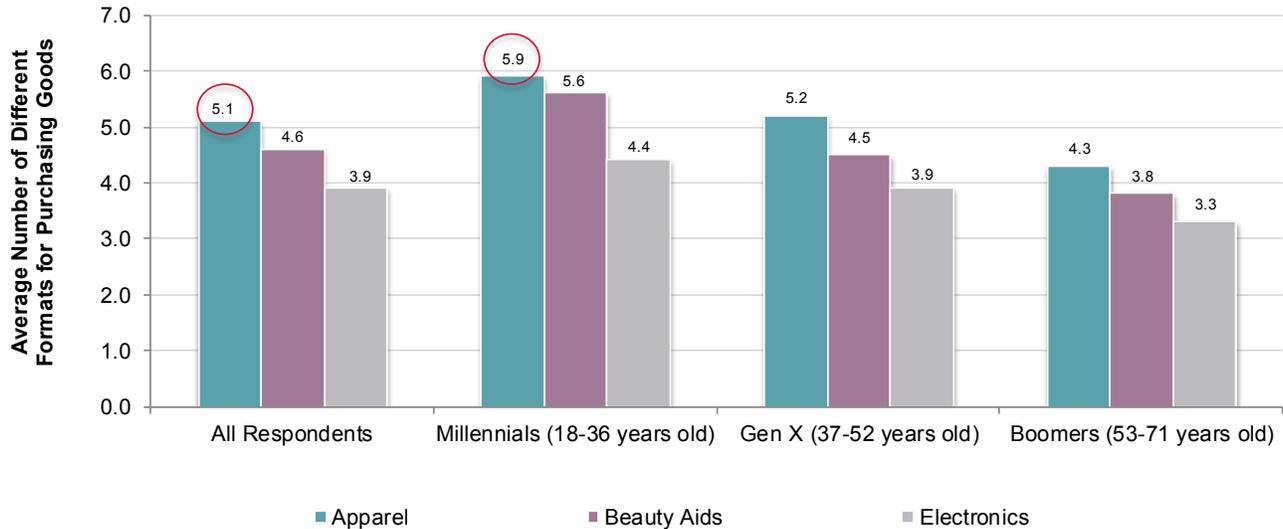
#### **SECTION F: DISCOUNTS/PROMOTIONS HAVE AN IMPACT ON BUYING APPAREL, BEAUTY AIDS AND ELECTRONICS (p.7)**

- Discounts/promotions are most likely to have an impact on the variety/amount of retailers visited among electronics buyers and least likely on beauty-aids shoppers. (*Chart 12*)
- Electronics shoppers are most likely to look for promotions or seek retailers who sell those items cheaper, while beauty-aids shoppers are less inclined to buy those items at a discount. (*Chart 13*)
- More apparel shoppers admit that buying those items at a discount increases the amount of items they purchase within the same category or at the same retailer during the same shopping trip or online session. (*Chart 14*)
- More than three-fourths of electronics shoppers say that researching prices online before buying in stores increases the number of different types of retailers they patronize compared with apparel shoppers (66%) and beauty-aids shoppers (59%). (*Chart 15*)
- Top reasons among shoppers for buying goods at a discount include: 1) Don't mind buying discontinued or end-of-the-season items and/or those sold at outlet centers 2) Seeking discounts gives great satisfaction 3) Trying to stick to a budget. (*Table 1*)

**SECTION A: SHOPPING AT DIFFERENT RETAILER FORMATS**

**Chart 1:**

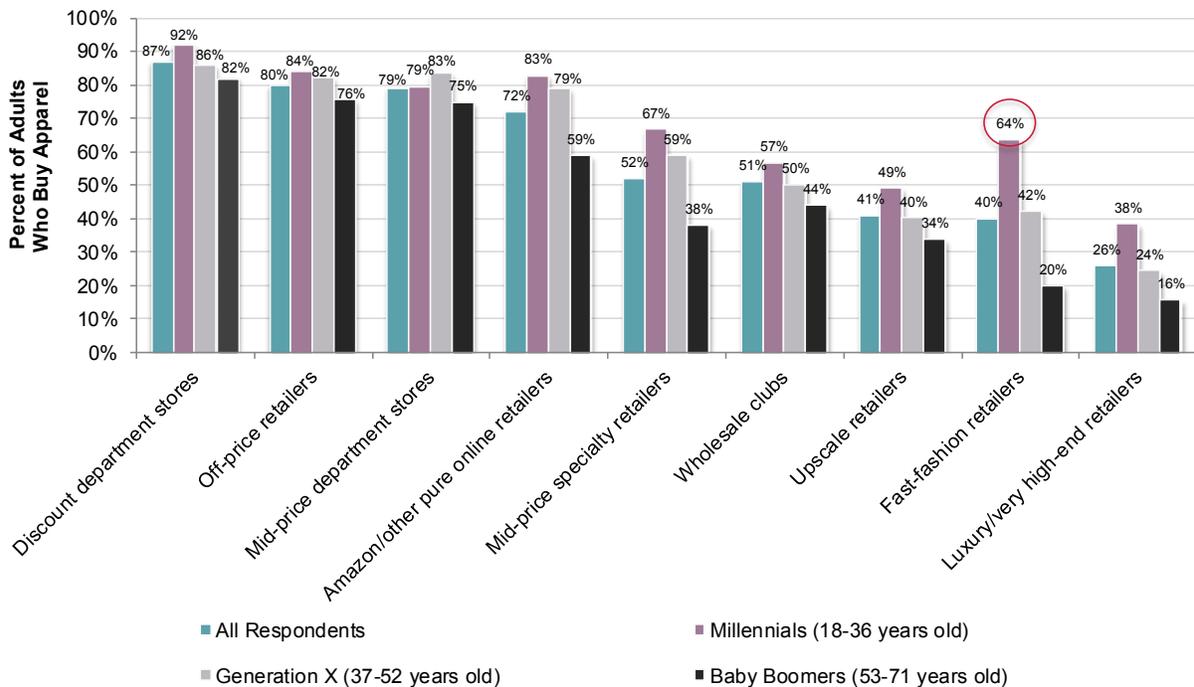
*Shoppers purchase apparel from the greatest number of retailer types. Millennials buy all products from more retailer types...*



**SECTION B: WHERE SHOPPERS PURCHASE APPAREL, BEAUTY AIDS AND ELECTRONICS**

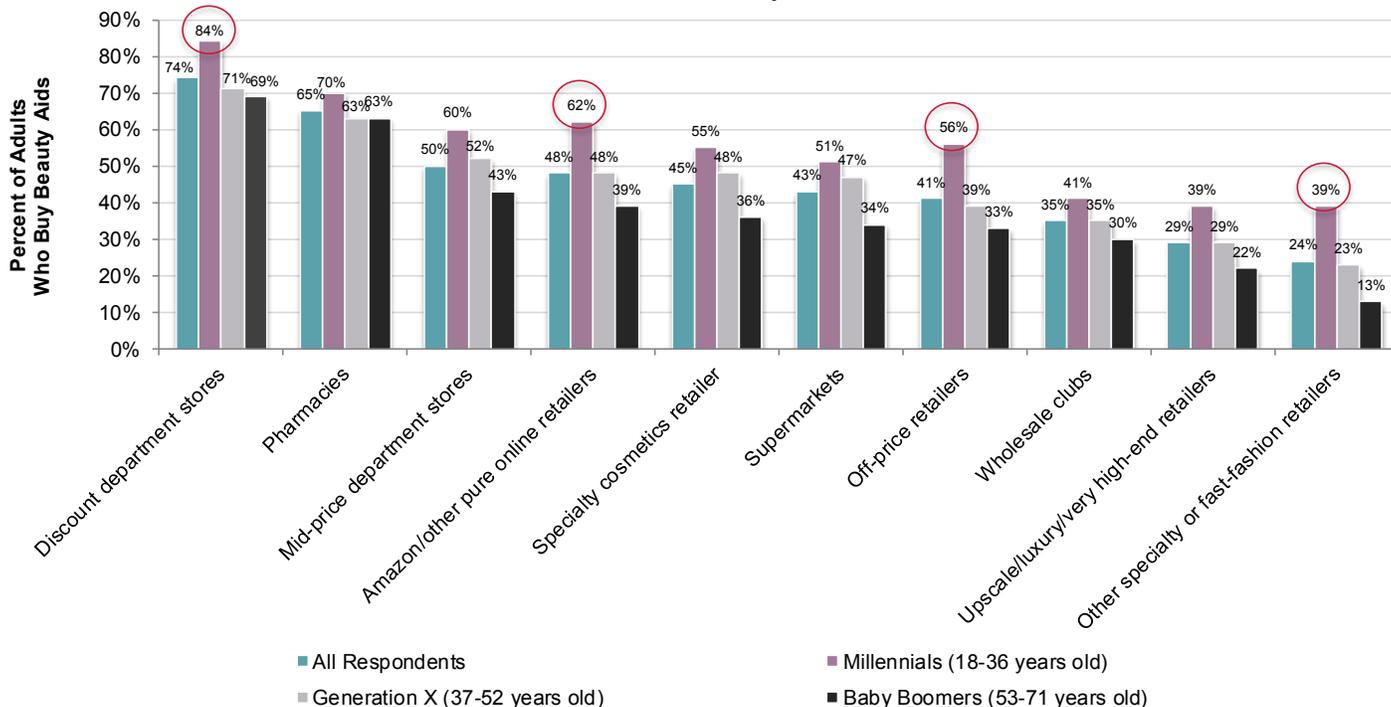
**Chart 2:**

*Far more millennials buy apparel from fast-fashion retailers than older shoppers...*



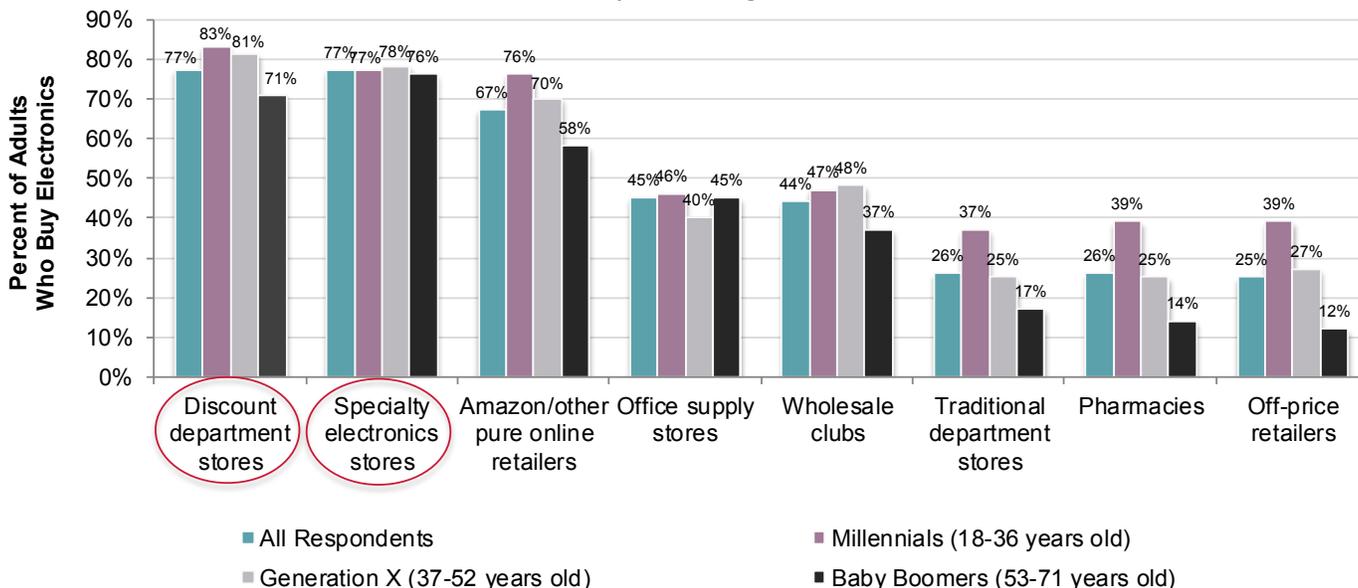
**Chart 3:**

*Significantly more millennials purchase **beauty aids** from discount department stores, Amazon/other pure online retailers, off-price retailers and other specialty or fast-fashion retailers than Gen Xers and Baby Boomers ...*



**Chart 4:**

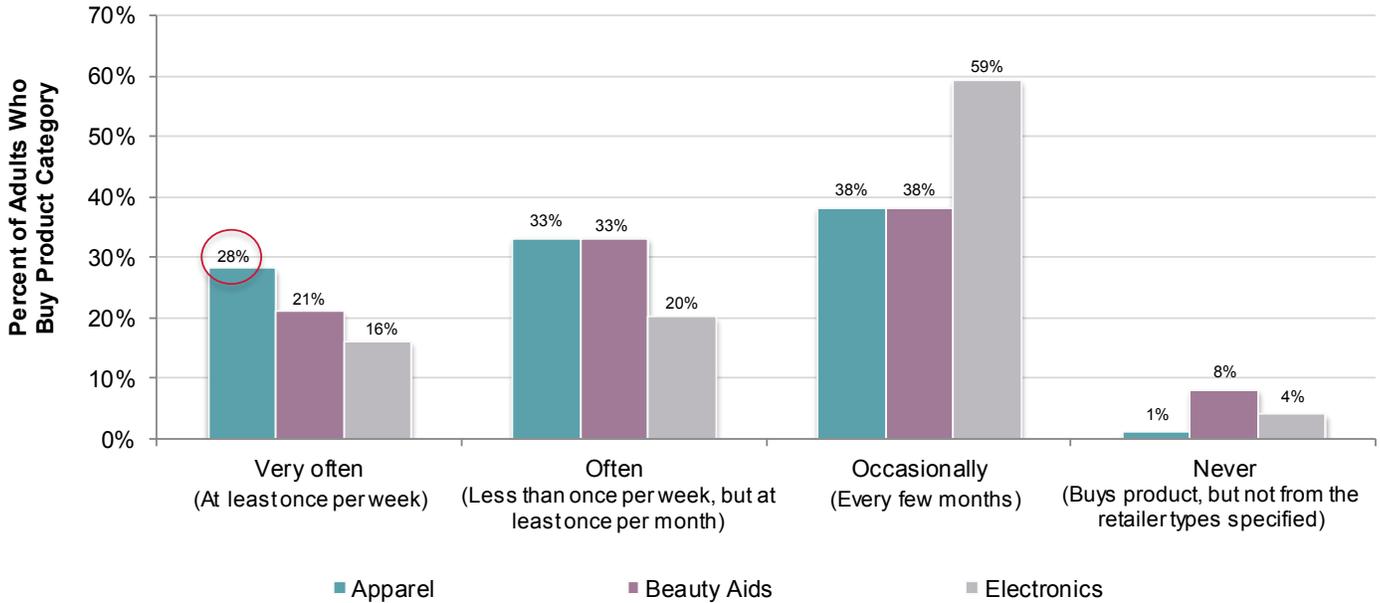
*Discount department stores and specialty electronics retailers are the most popular venues for purchasing **electronics**...*



**SECTION C: FREQUENCY OF MAKING PURCHASES**

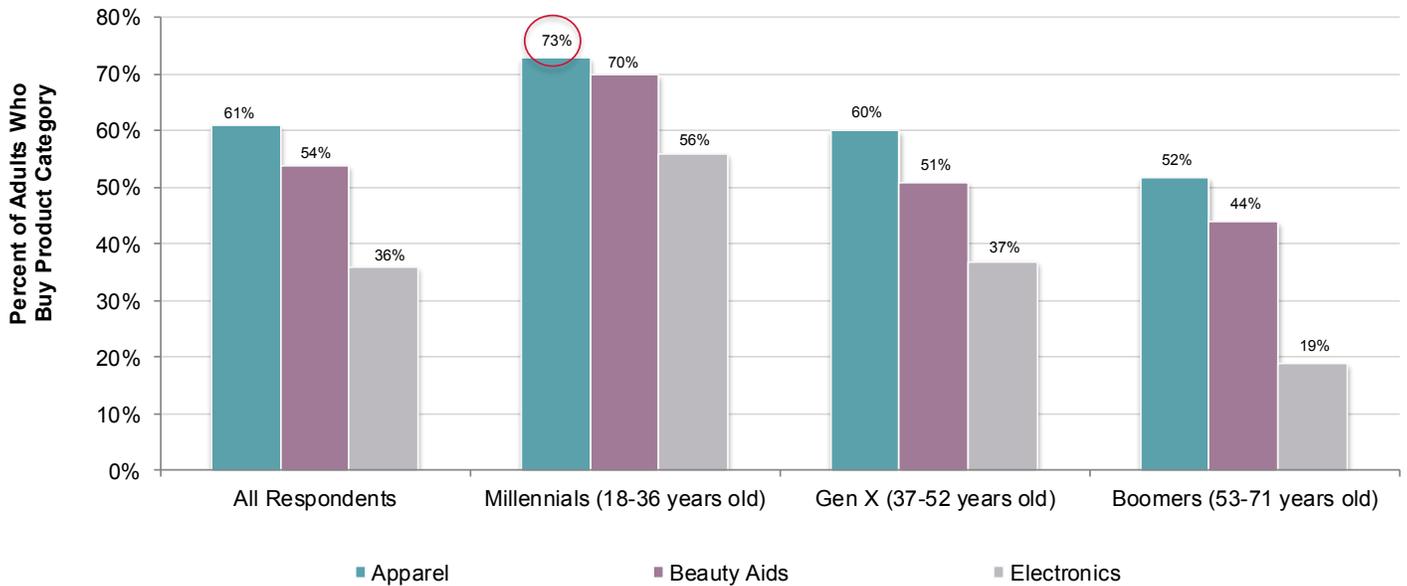
**Chart 5:**

*Shoppers purchase apparel most frequently, followed by beauty aids and electronics...*



**Chart 6:**

*More millennials purchase products at least once per month\* compared with older shoppers...*

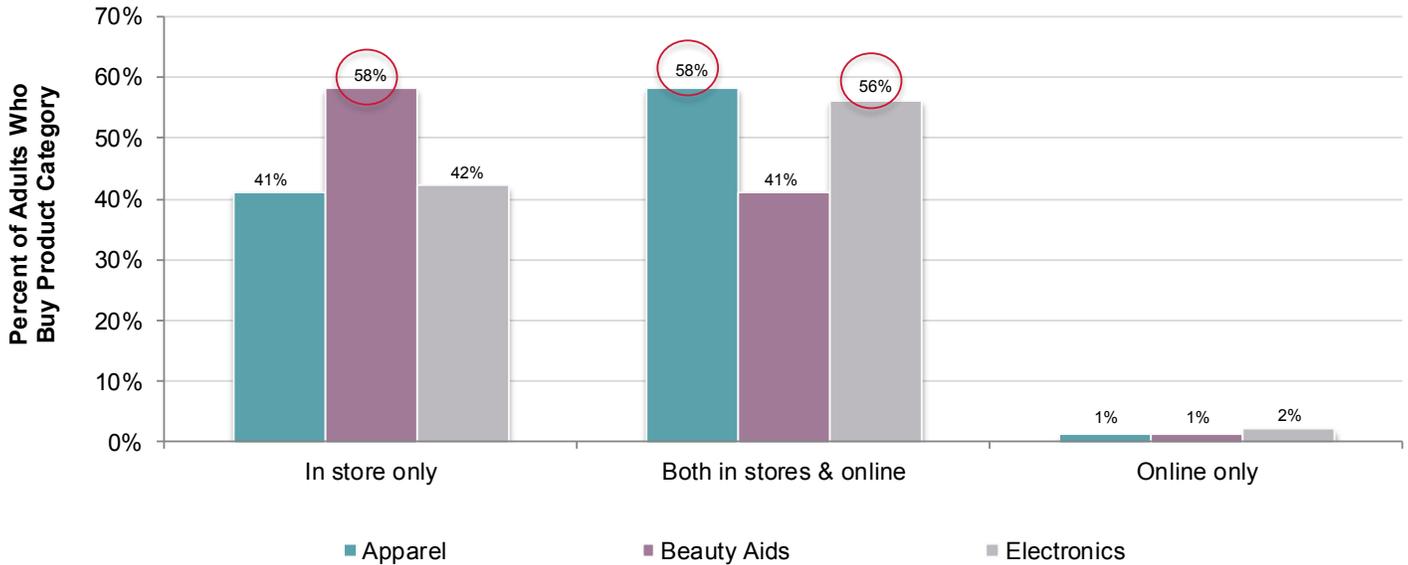


\*Includes shoppers who said they purchase very often and often.

**SECTION D: BUYING GOODS IN STORES AND/OR ONLINE**

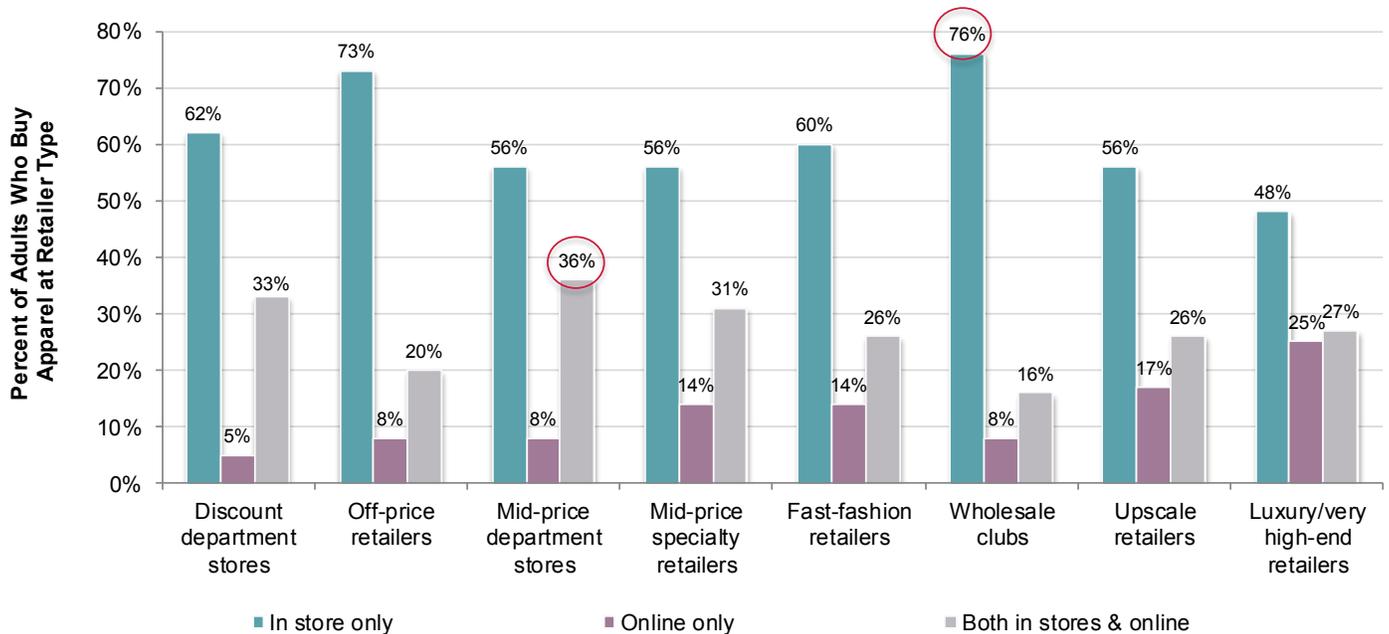
**Chart 7:**

*More than half of those purchasing apparel and electronics are omni-channel shoppers. The largest share of beauty-aids shoppers, however, buys in stores only...*



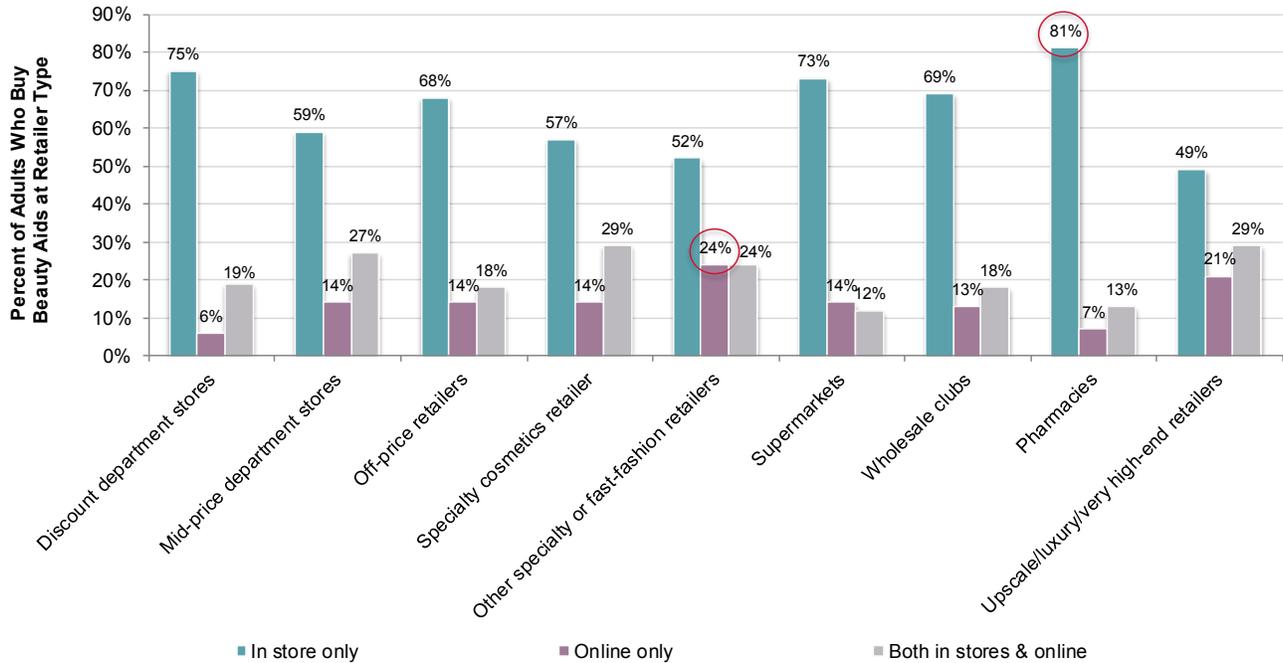
**Chart 8:**

*Wholesale clubs have the greatest share of in-store-only apparel shoppers, while mid-price department stores have the greatest amount of omni-channel shoppers...*



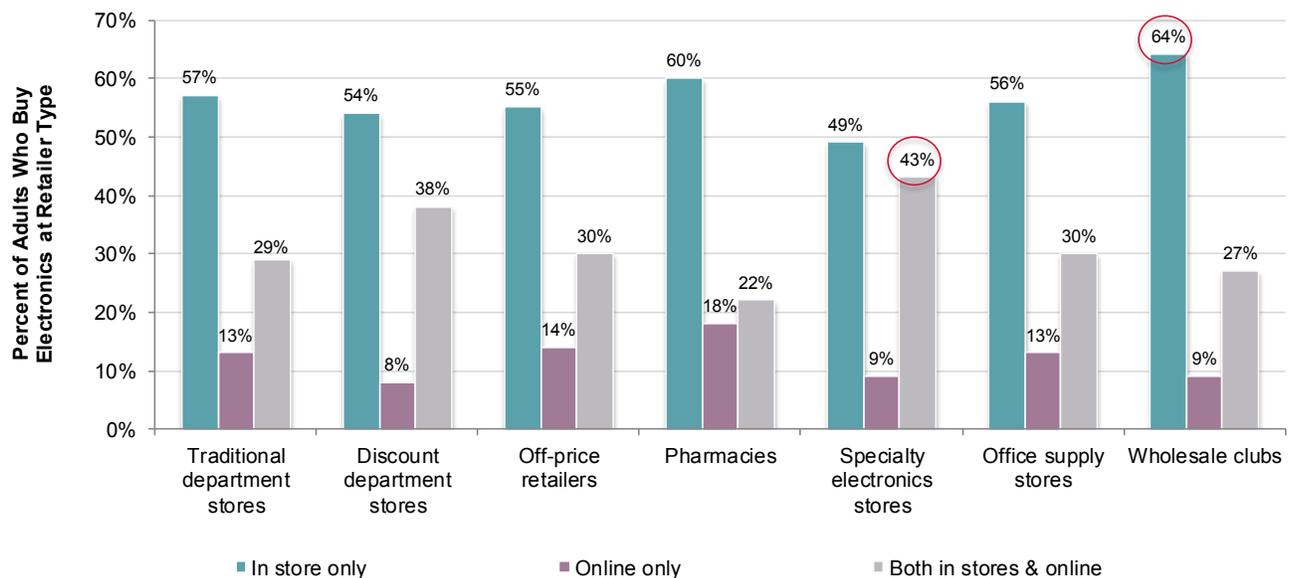
**Chart 9:**

*Pharmacies have the greatest amount of shoppers who purchase **beauty aids** in stores only while other specialty or fast-fashion retailers have the largest share who purchase online only...*



**Chart 10:**

*Shoppers who buy **electronics** at wholesale clubs are most likely to buy in stores only, while specialty electronics stores have the greatest amount of omni-channel shoppers...*



**SECTION E: OBTAINING ONLINE ORDERS**

**Chart 11:**

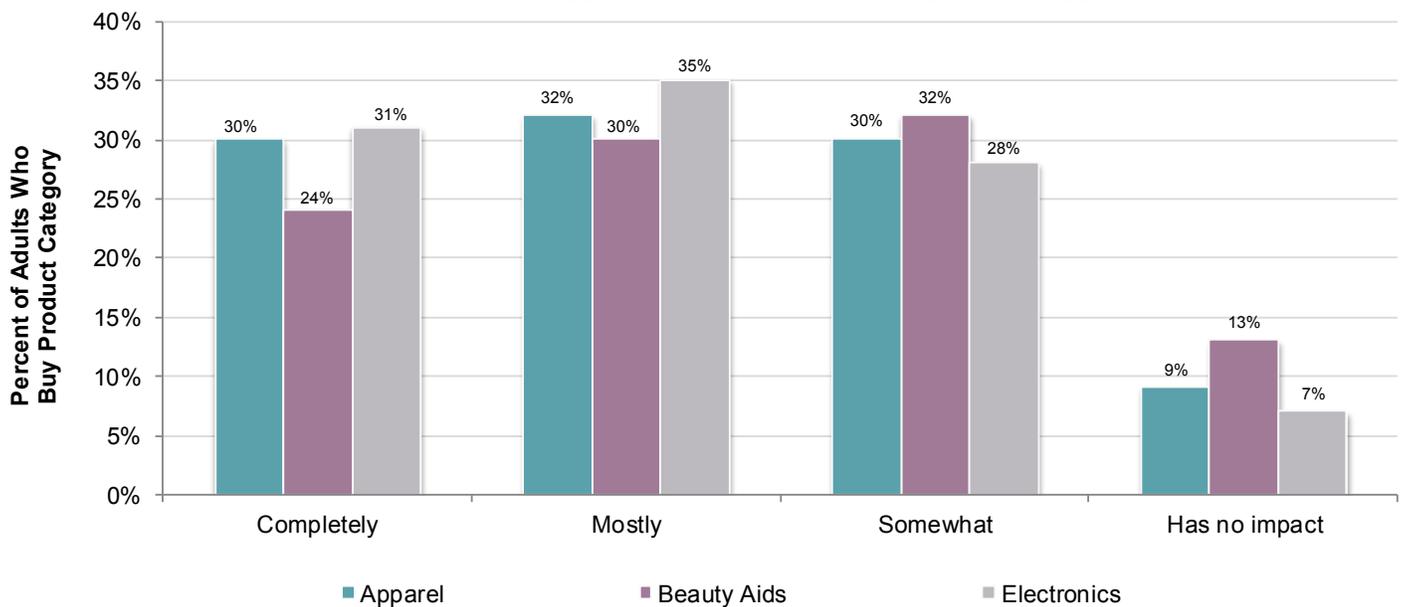
*Although more shoppers who buy online have their orders shipped home, significant shares also pick up their merchandise in stores...*



**SECTION F: DISCOUNTS/PROMOTIONS HAVE AN IMPACT ON BUYING APPAREL, BEAUTY AIDS AND ELECTRONICS**

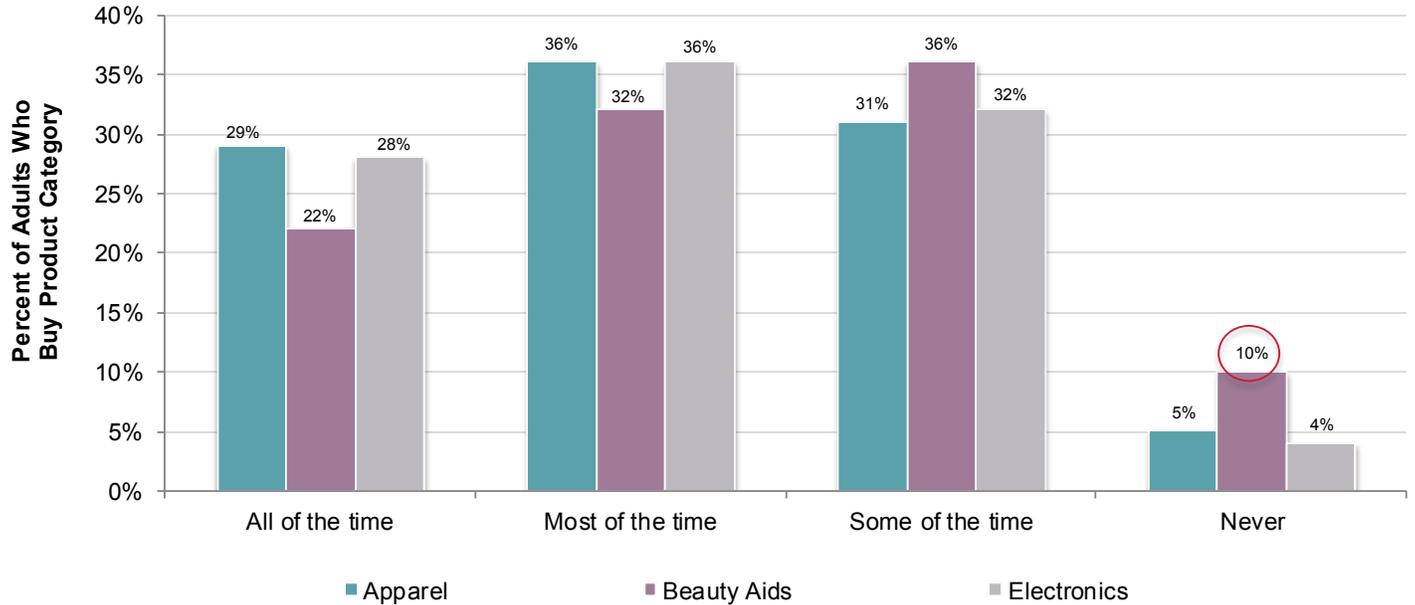
**Chart 12:**

*Discounts/promotions have an impact on the variety/amount of retailers visited among more electronics shoppers than apparel or beauty-aids shoppers...*



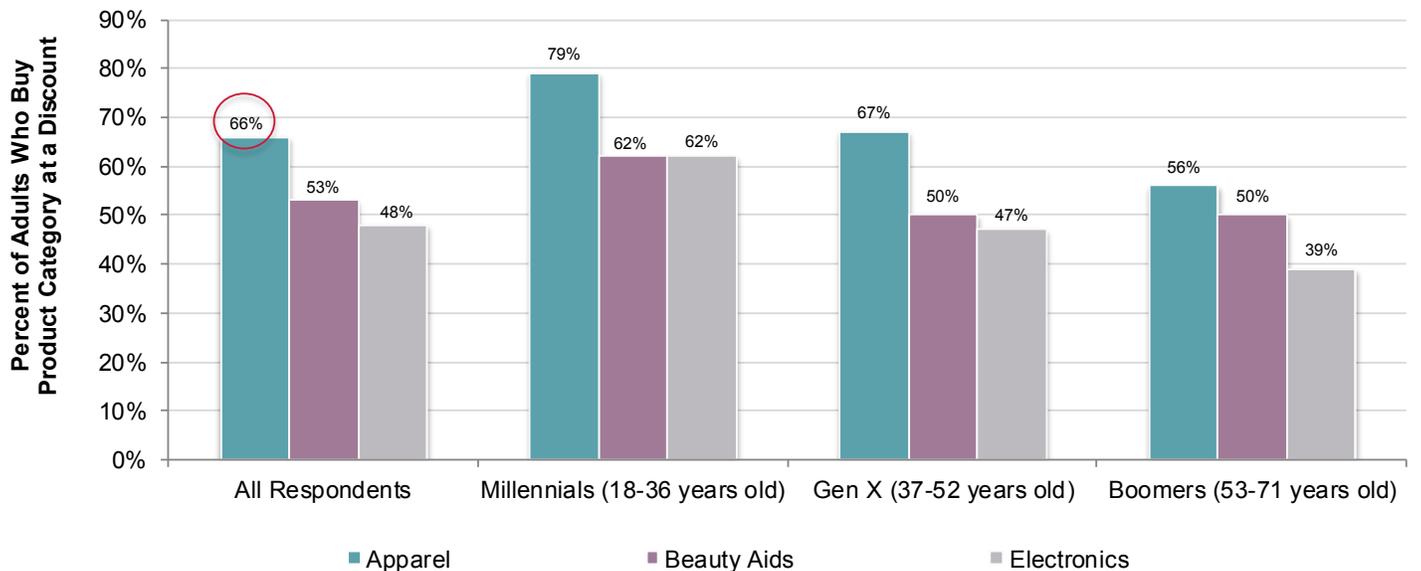
**Chart 13:**

*Beauty-aids shoppers are most likely not to buy items at a discount or seek retailers that offer discounts...*



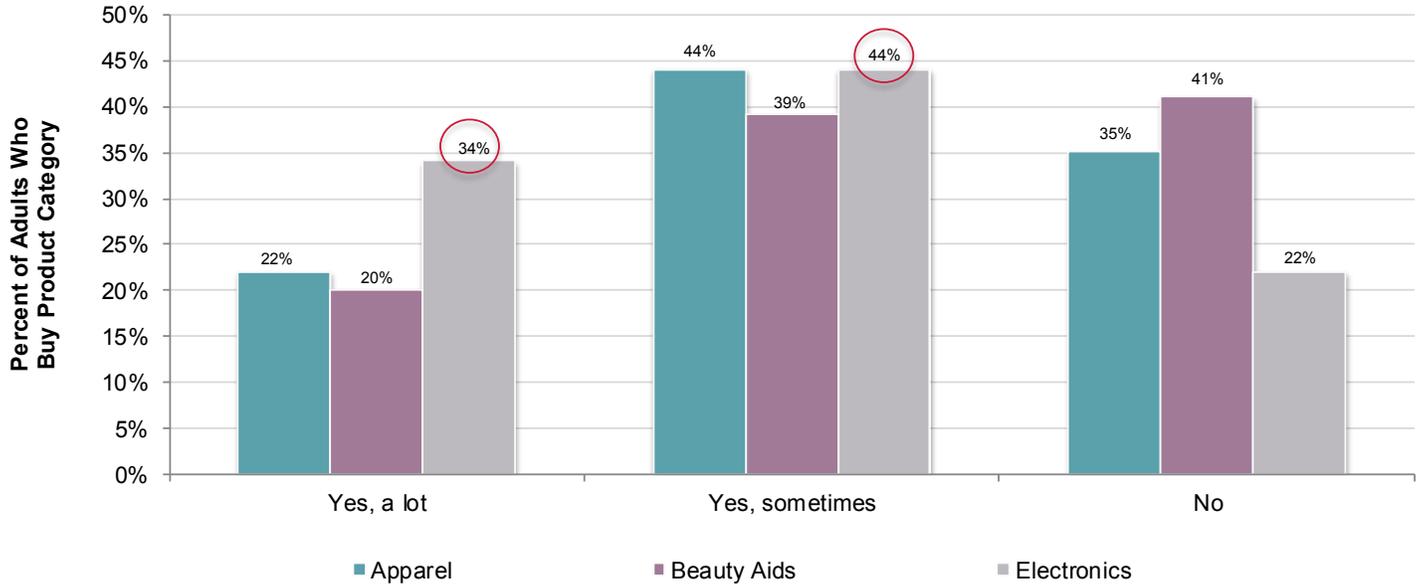
**Chart 14:**

*A higher share of apparel shoppers say that buying apparel at a discount increases the amount of items they purchase within the same category or at the same retailer during the same shopping trip or online session...*



**Chart 15:**

*More electronics shoppers say that researching prices online before purchasing in stores increases the number of different types of retailers they patronize a lot...*



**Table 1:**

*The largest share of Baby Boomers buys discounted items because "they don't mind purchasing end-of-season merchandise", while the greatest number of Gen Xers buy discounted goods to "stick to a budget" ...*

	Percent of Respondents Who Buy Discounted Items			
	All Respondents	Millennials (18-36 years old)	Generation X (37-52 years old)	Baby Boomers (53-71 years old)
I don't mind buying discontinued or end-of-the-season items and/or those sold at outlet centers	49%	47%	45%	53%
Seeking discounts gives me great satisfaction	48%	43%	48%	52%
I do my best to stick to a budget	47%	47%	52%	44%
There is no quality difference in my mind between items sold at full price and those sold at a discount	42%	36%	38%	48%
Full-price products are overpriced and not worth the money being charged	41%	38%	40%	42%
I don't want to pay full price for something that won't last long	31%	31%	32%	29%
I don't have the means to buy products at full price	21%	27%	19%	15%

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