

SPECIAL REPORT

FIELD AGENT[®] PRESENTS

THE DIGITAL SHOPPER

*Insights into Today's Most
'Connected' Customers*



DIGITAL RETAIL AWAITING A TIPPING POINT

Let's face facts: Shoppers who go online to purchase "everyday" items like groceries and household consumables are still in the minority.

In fact, a Field Agent screener of 9,088 U.S. adults conducted in March 2018 found only 18% of shoppers presently purchase fresh groceries online, and 26% go online for packaged groceries.

But that's really not the point, is it?

After all, the reason business professionals and analysts are currently so fixated on digital retail, particularly as it touches on low margin categories like groceries, has less to do with present usage than potential usage. Many clearly expect a tipping point for such retail sometime in the quickly approaching future.

Soon, buying peanut butter and paper towels online could be the rule rather than the exception.

Which partly explains the sense of urgency among retailers, brands, and agencies to understand digital shoppers—those individuals who buy more than the occasional book or gift online, those individuals whose daily consumption needs are met in large part by ecommerce.

Enter *The Digital Shopper*, Field Agent's special report exploring several pressing questions about today's most 'connected' customers. Encompassing thousands of survey and mystery shop responses, this report offers precious insight into, potentially, the emerging majority: those shoppers who purchase "everyday" products online.

So as others merely wait on a tipping point, we trust this report will help you serve today's digital minority even as it helps you prepare for tomorrow's digital majority.

Wishing you and your company great success.





TABLE OF CONTENTS

- | | |
|---|--|
| 04 Digital shopper profile | 14 Comparing Amazon/Walmart PDPs |
| 05 Digital shopping around the world | 16 Kroger-Instacart user experience |
| 06 The digital shopper's journey | 17 Amazon Locker user experience |
| 08 Auto subscription usage | 18 Buying clothes online |
| 10 The product listing page | 20 AmazonSmile usage |
| 11 The product detail page | 21 Digital promotion around the world |
| 13 Online money-saving tactics | 23 Methods and demos |

EDITOR-IN-CHIEF
Chris Medenwald, PH.D.
chris.medenwald@fieldagent.net

DIRECTOR
Katherine Beebe
katherine.beebe@fieldagent.net

DESIGNER
Samuel Gray
samuel.gray@fieldagent.net

PUBLIC RELATIONS
Cory Nelson
cory.nelson@fieldagent.net

VIDEO MANAGER
Kyle Stück
kyle.stuck@fieldagent.net

RESEARCH ANALYST
Hannah Holloway
hannah.holloway@fieldagent.net

ENDCAPS | AND | INSIGHTS

The Field Agent Blog, *Endcaps & Insights*, offers a steady stream of information and insights from the ever-changing world of retail

[Subscribe to the Blog](#)

MEET THE DIGITAL SHOPPER

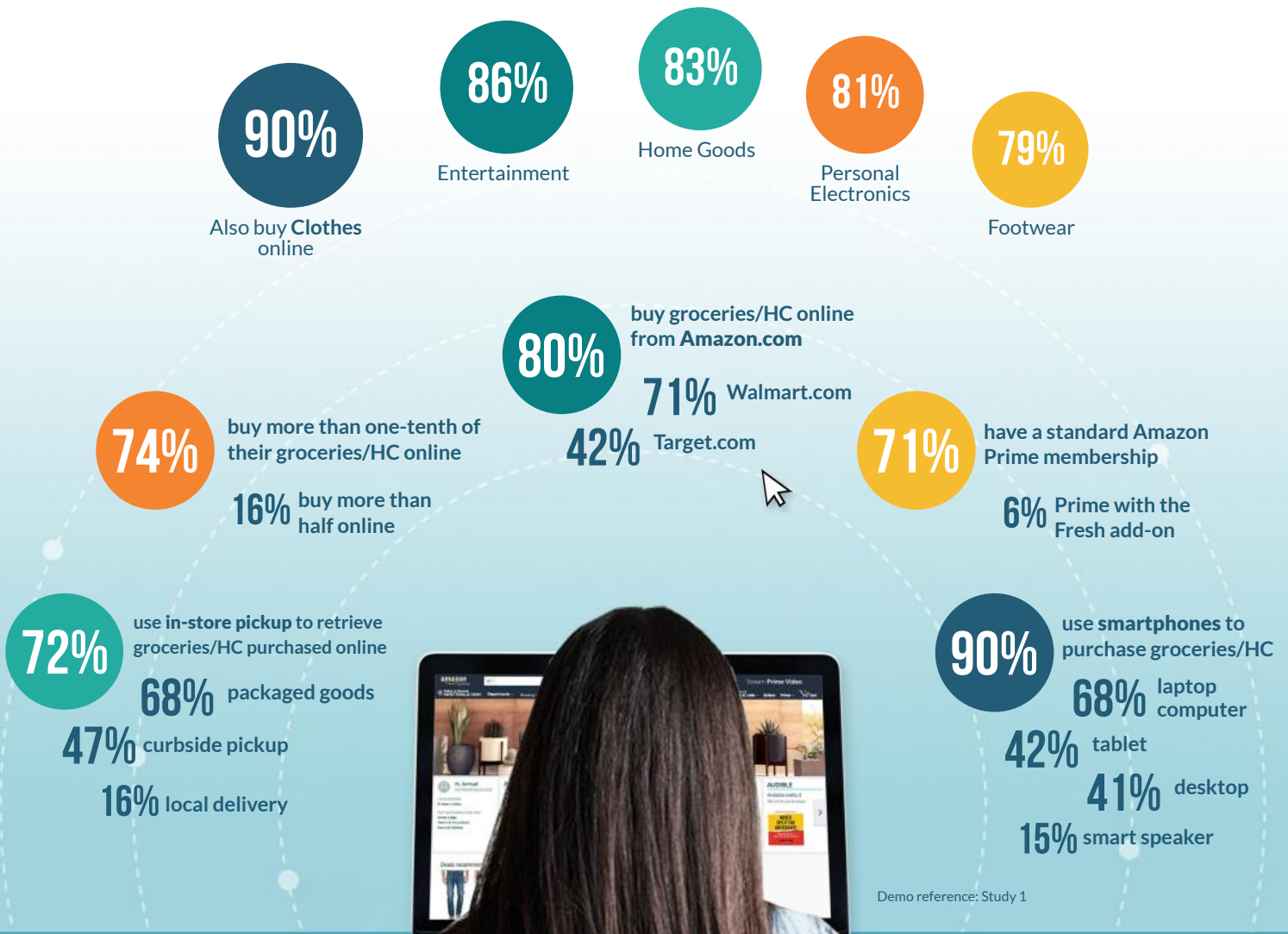
In March 2018, Field Agent screened 9,088 members of its panel of more than one million U.S.-based agents. Of these, 1,848, or 20%, indicated they shop online for *at least three of the following four categories: packaged groceries, fresh groceries, household cleaning supplies, and/or personal care supplies.*

This subset of 1,848 shoppers thus represents the most connected type of shopper: those who purchase “everyday” items like groceries and household consumables* online. Such digital shoppers rely on ecommerce to satisfy many of their daily needs.

*Throughout this report we define “household consumables” (HC) as “non-grocery, non-durable goods like cleaning supplies, detergent, toilet paper/paper towels, pet supplies, baby supplies, personal care items, etc.”

May we introduce the digital shopper...

100% buy groceries and household consumables online

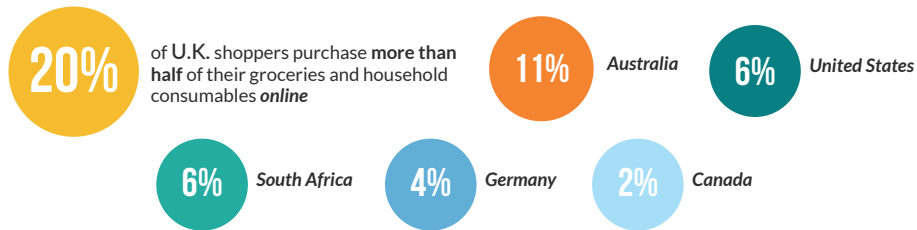
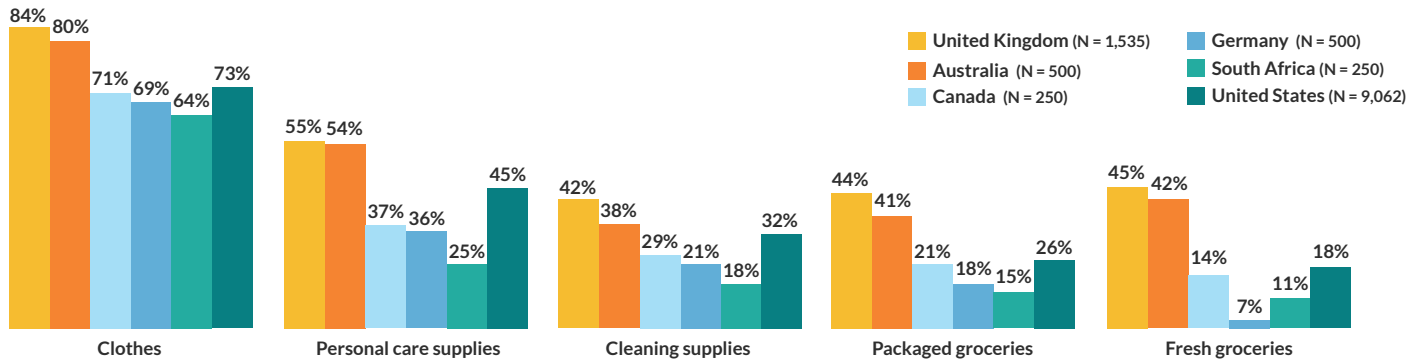


BY COMPARISON: SHOPPERS AROUND THE WORLD

To further illuminate and differentiate the digital shopper as presented on page 4, below we offer insights on the general shopper population.

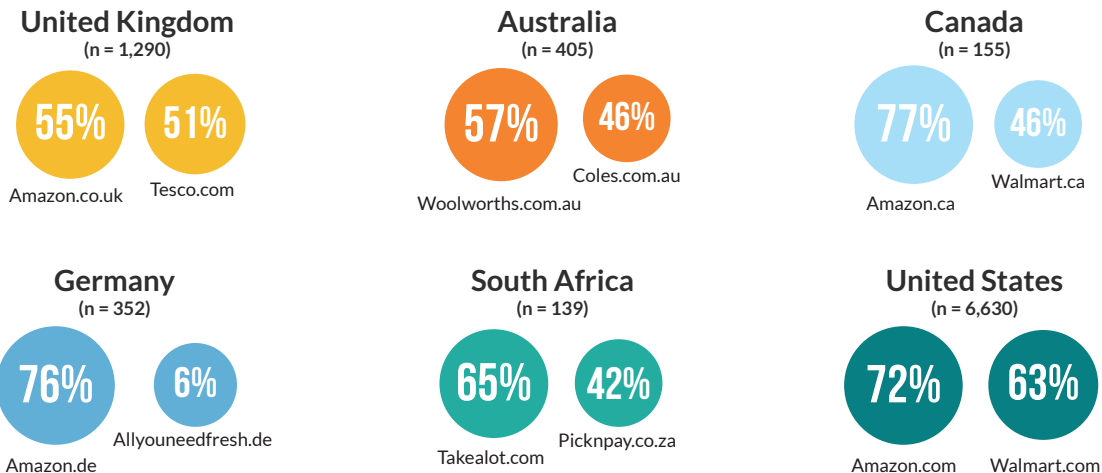
With operations in eight countries and growing, Field Agent regularly serves companies with their cross-border auditing and insights needs. Below we incorporate insights from five major international markets.

What do shoppers purchase online?



Top online retailers for purchasing groceries and/or household consumables—by country

Among those who purchase groceries/household consumables online



THE DIGITAL SHOPPER'S JOURNEY

For all the attention paid to “the shopper’s journey,” precious little is actually known about the *digital* shopper’s journey. Below, Field Agent maps out this journey from start to finish, highlighting some of the key decisions and actions of individuals shopping online for groceries/household consumables.

This map is based on post-shop surveys with 451 digital shoppers. Each participant completed this survey immediately after buying at least \$30 of groceries/household consumables from an online retailer for local pickup or in-town delivery.

Field Agent scrutinized each agent submission to ensure participants had just completed an “online grocery-shopping trip.” To qualify, participants were required to submit screenshots/photos showing what they purchased, when they purchased it, and how much they spent.



#1 PRE-SHOPPING



55% created a shopping list before going online

12% prefilled their digital shopping carts with planned purchases

Those who made a shopping list ⁽¹⁾

Those who did not make a shopping list ⁽²⁾

69%

Made a handwritten shopping list



67%

Just remembered what they needed

46%

Repeated all or some purchases from the past

Gathering Info & Savings BEFORE SHOPPING VS DURING SHOPPING

	Before Shopping Online	During Shopping Online
Inventoried kitchen cabinets/refrigerator	57%	38%
Took requests from household members	56%	43%
Searched for digital/paper coupons	21%	20%
Researched meal recipes	20%	13%
Looked through retailer's weekly ad/circular	18%	17%
Compared prices between online retailers	13%	12%
Researched nutritional info/ingredients	6%	16%
Read product reviews	2%	4%

1 - Among shoppers who used a shopping list (n = 247)

2 - Among shoppers who did not use a shopping list (n = 204)

3 - Among shoppers who did not buy fresh produce online (n = 159)

4 - Among shoppers who made unplanned purchases (n = 294)

5 - Among shoppers who will make an additional in-store trip to complete their shopping (n = 352)

#2 SHOPPING ONLINE

69% shopped for & purchased everything in just one "sitting" or session

10% three or more sittings

7% "completed" some shopping through auto-refills

Top categories purchased today...

65% fresh produce

65% chilled dairy products

38% salty snacks

34% fresh meat

33% canned foods



39% did not buy fresh produce because they prefer to inspect it in-person ⁽³⁾

36% plan a store trip to purchase fresh produce

57% bought mostly what was on their shopping list today ⁽¹⁾

29% bought only what was on their list



65% made at least one unplanned purchase today

Top unplanned purchases made today... ⁽⁴⁾

31% fresh produce

23% salty snacks

18% frozen meals

14% candy/chocolate

#3 POST-SHOPPING

59% were completely or very likely to make an in-store trip to complete shopping

22% not very/not at all likely



Top reasons for making in-store visit...⁽⁵⁾

37% need to buy items from a **different** retailer

33% don't like buying certain items online

33% want to take advantage of sales/coupons

24% forgot something while shopping online

22% some items online were unavailable

70% will buy fresh produce on their additional store visit⁽⁵⁾



84% were completely or very satisfied with their designated pickup/delivery time slots

62% checked receipt/order confirmation for accuracy

35% checked pickup or delivery status

8% saved some or all of today's purchases to make it easy to repeat the purchases in the future

RETAILER SATISFACTION

How satisfied were shoppers with the online shopping and buying experience today?

% completely or very satisfied...

94%

Kroger
(n = 67)

92%

Walmart
(n = 261)

91%

Amazon
(n = 32)

91%

Overall
(N = 451)



The % by retailer encompasses all acquisition methods and partnerships (e.g., pickup and/or delivery)

1 - Among shoppers who used a shopping list (n = 247)

2 - Among shoppers who did not use a shopping list (n = 204)

3 - Among shoppers who did not buy fresh produce online (n = 159)

4 - Among shoppers who made unplanned purchases (n = 294)

5 - Among shoppers who will make an additional in-store trip to complete their shopping (n = 352)

ABOUT THIS STUDY...

Where did digital shoppers purchase their groceries/household consumables?*

- Walmart Pickup - 59%
- Kroger-Checklist/Kroger-Instacart - 15%
- AmazonFresh Delivery/Pickup - 7%
- Target-Shipt - 3%
- Meijers-Shipt - 2%
- Fred Meyer-Instacart - 2%
- Smith's Grocery-Instacart - 2%
- Publix-Shipt - 2%
- Sam's Club Pickup/Instacart - 1%
- Costco-Instacart/Costco-Google Express - 1%
- Safeway-Instacart - 1%
- Whole Foods-Instacart - 1%
- H-E-B Instacart/H-E-B Shipt - 1%
- Aldi-Instacart - 1%
- Frys-Clicklist - 1%
- ShopRite Pickup/Delivery - 1%
- HyVee Pickup/Delivery - 1%
- Sprouts-Instacart - 1%

*Field Agent limited the number of times certain online retailers could be represented in the study, thus ensuring a variety of online retailers. Consequently, the information above is only meant to describe the sample and not to demonstrate which online retailers are comparatively more popular among digital shoppers.

12 other retailers were represented in the study, but none of these were shopped by more than two participants.

How did digital shoppers acquire their purchases?

- Curbside pickup - 72%
- Local delivery - 19%
- In-store pickup - 9%

Note: Not meant to describe the relative prevalence of methods, only to describe the sample

What devices did digital shoppers use?

- Smartphone apps (not smartphone browser) - 63%
- Laptop computer - 22%
- Smartphone web browser (not apps) - 15%
- Desktop computer - 14%
- Tablet computer - 5%
- Other - 1%

Note: Field Agent asked participants to identify all devices they used at any point in the planning-shopping-purchasing process

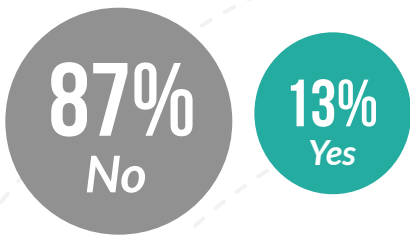
Demo reference: Study 2

IT'S AUTOMATIC: ONLINE SUBSCRIPTIONS



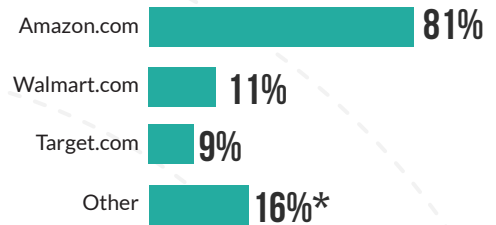
Field Agent surveyed 2,047 online shoppers to understand the popularity of online subscriptions that automatically reorder previous purchases of packaged groceries and household consumables

Do you have one or more online subscriptions to automatically reorder packaged groceries and/or household consumables?



With which online retailers do you currently have subscriptions?

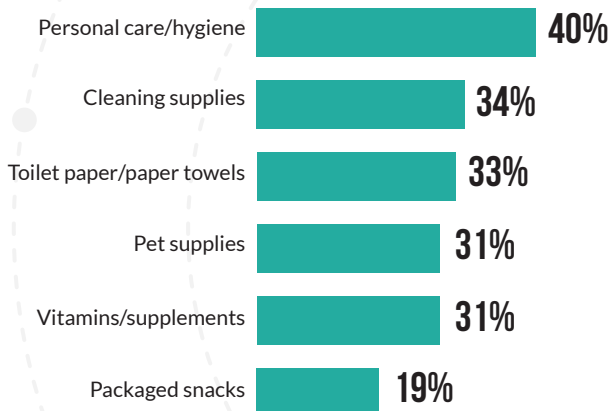
Among those who have online subscriptions for packaged groceries/household consumables (n = 258)



*Chewy.com was the top write-in

For which product categories do you currently have an online subscription?

TOP 5...



Among those who have online subscriptions for packaged groceries/household consumables (n = 258)

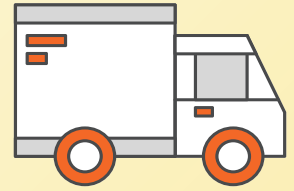
Subscribe to the Field Agent Blog

Don't miss out on the latest insights on digital shoppers...

[Subscribe to the Blog](#)

Demo reference: Study 8

PICKUP & DELIVERY INSIGHTS

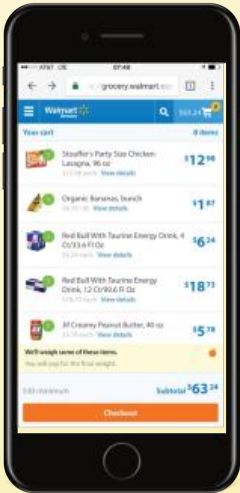


Field Agent provides the images, information, and insights you need to develop and optimize pickup and delivery services. *From start to finish.*



Shopper Insights

We crowdsource over one million smartphones to capture shopper's attitudes and intentions toward pickup/delivery services



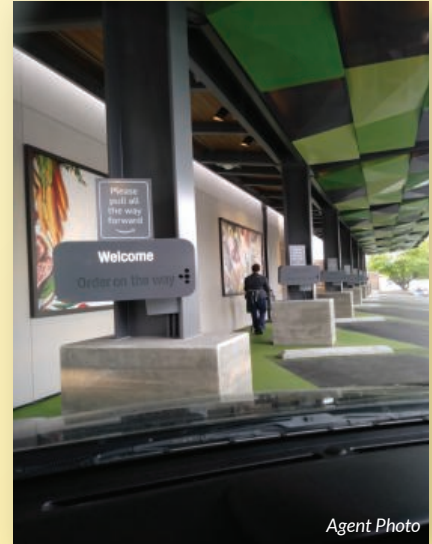
Online Ordering Insights

Through the Field Agent mobile app, customers can show you any stage of the pickup/delivery process, even ordering online



Pickup & Delivery Insights

Photos and video let you see your pickup and delivery operations, and your competitors', as customers see them. Track the pickup/delivery landscape over time



Agent Photo



Agent Photo

*Field Agent Has
Pickup & Delivery in the Bag*

Get Started Today

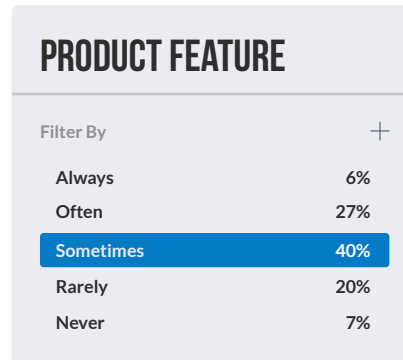
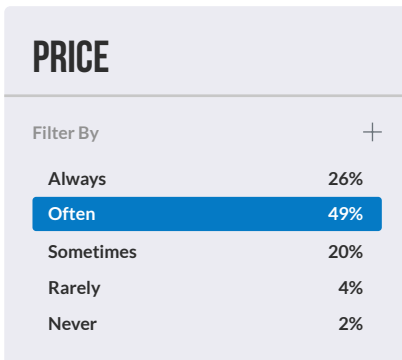
The Product Listing Page: A SHOPPER-GUIDED TOUR

Jointly, the product listing page (PLP) and product detail page (PDP) are ground zero in the fight for online shoppers and their dollars. It's where sales are made...and sales are lost.

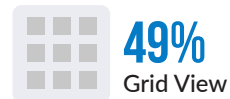
Field Agent surveyed 2,071 online shoppers to understand their attitudes and behaviors toward PLP and PDP pages.

How often do you filter PLP results in these ways?

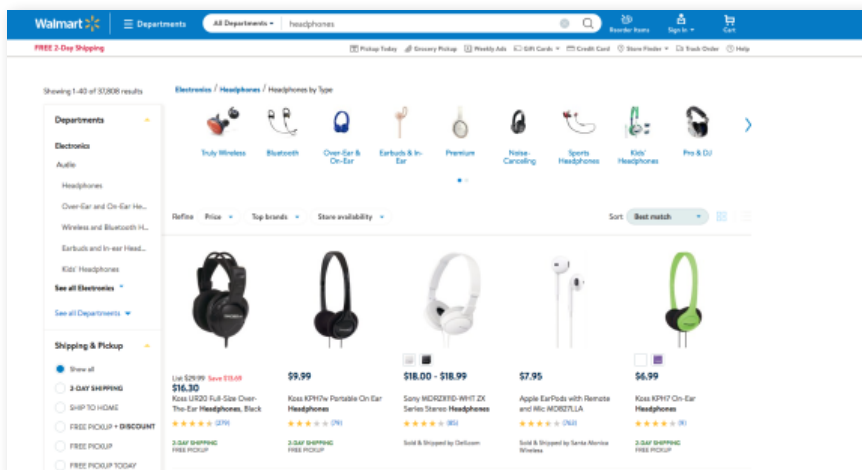
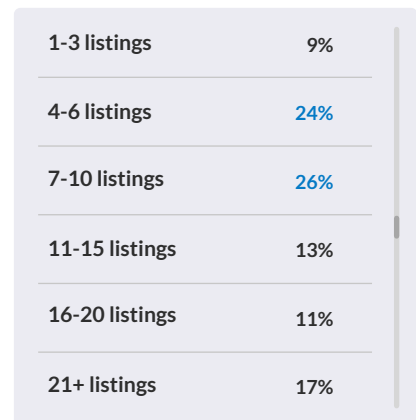
[Online Shoppers](#) ▶ Attitudes & Behaviors



Which layout do you prefer?



Generally, how many different listings do you scroll through before arriving at the product you wish to buy?



Product Listing Page Example

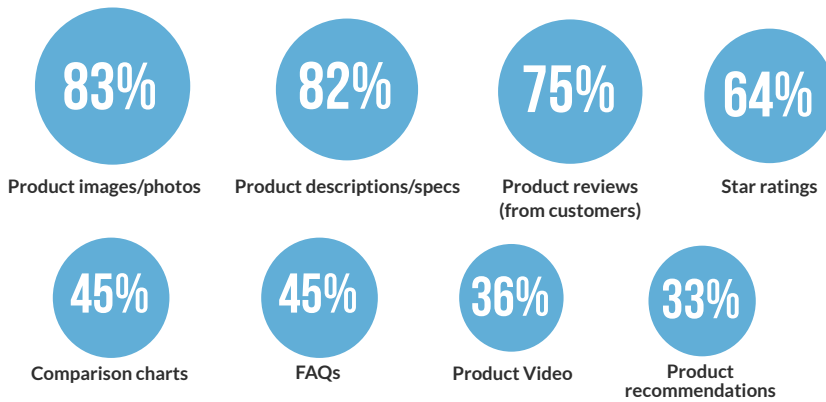


The Product Detail Page: A SHOPPER-GUIDED TOUR

N = 2,071

What parts of the PDP drive online sales?

Which of these PDP features are extremely or very influential to shoppers' online purchase decisions?



Product Description Page Example

Which one PDP feature is *most* influential to your online purchase decisions?

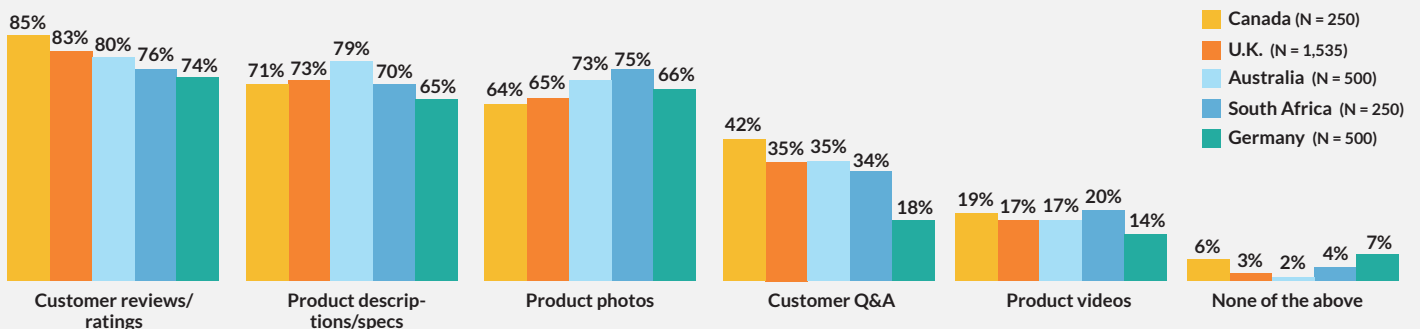
- Product reviews - 32%
- Product descriptions/specs - 30%
- Product images/photos - 17%

If you could have only one visual aid to guide your online purchase decisions, which would it be?

- Conventional, head-on photos - 34%
- 360-degree photos - 29%
- Up-close, detail photos - 14%
- Product video - 12%

GLOBALY SPEAKING: THE PDP

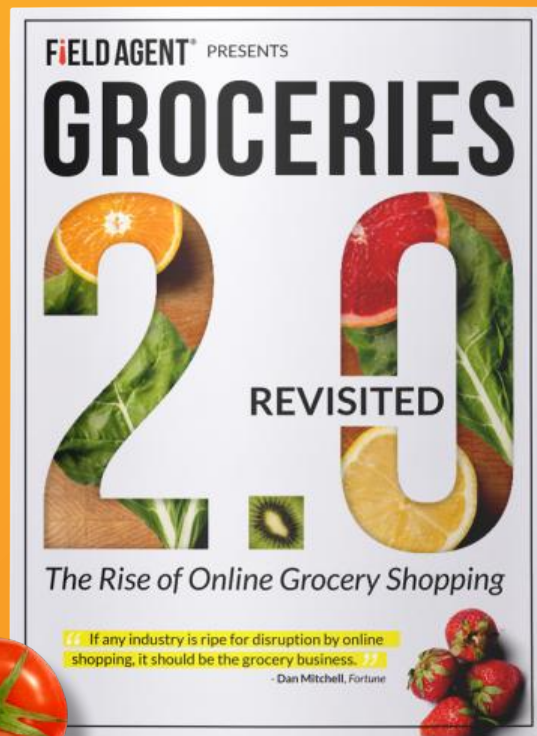
Which PDP features have *strong influence* over your online purchase decisions?



Demo reference: Study 3 (U.S. Data)

HUNGRY FOR MORE INSIGHTS?

Field Agent's special report, *Groceries 2.0 Revisited*, investigates the rise of online grocery shopping. This free report examines grocery pickup, grocery delivery, meal kits, and several state-of-the-art shopping technologies.



[Claim Your Free Copy Now!](#)

DIGITAL PENNY-PINCHERS

What are the most common methods by which shoppers "pinch pennies" when shopping online?

Field Agent asked.

Among 2,048 online shoppers:

86%
use **PROMO CODES**

60%
MEMBERSHIP
programs/cards



70%
COUPONS

19%
BROWSER EXTENSIONS
(e.g., Honey, Wikibuy)



The Main Event: SHOPPERS COMPARE AMAZON.COM WALMART.COM



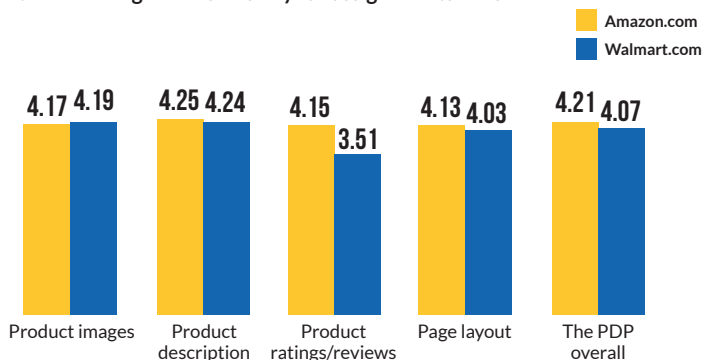
LET'S GET READY TO RUMBLLLLLLLE...

Online retailers Amazon.com and Walmart.com are competing heatedly for shoppers' dollars.

So Field Agent enlisted over 1,000 agents to rate the online retailers' product-detail pages, for a random product. Group A, consisting of 516 agents, researched Black & Decker's 10-speed "Crush Master" blender on Amazon.com, while Group B, consisting of 517 agents, researched the same product on Walmart.com. No agent belonged to both groups.

Agents then rated each retailer's PDP on several dimensions. They also captured screenshots, displayed on the following page, of the most helpful part of their assigned PDP.

On a scale from 1-5, where 5 is "very good" and 1 is "very poor," rate the following dimensions of your assigned retailer's PDP



Agent Photos

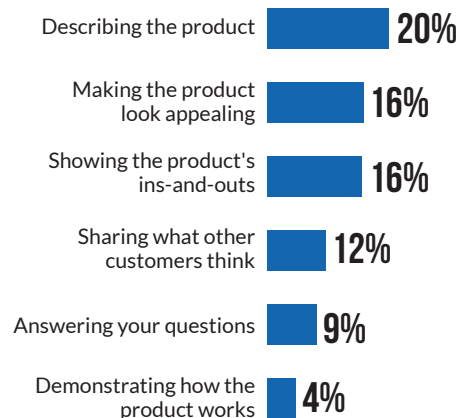


Based on your experience today, what do Amazon.com's PDPs do better than Walmart's?



Among Group A participants who had previously shopped at Walmart.com (n = 433)

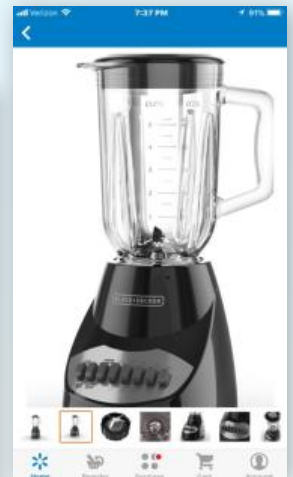
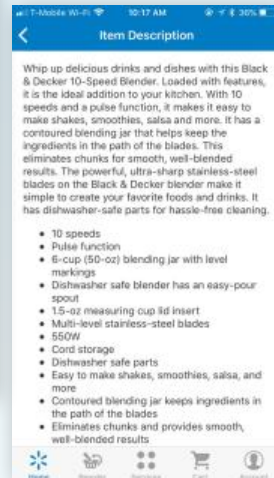
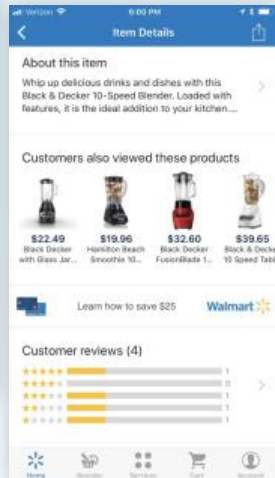
Based on your experience today, what do Walmart.com's PDPs do better than Amazon's?



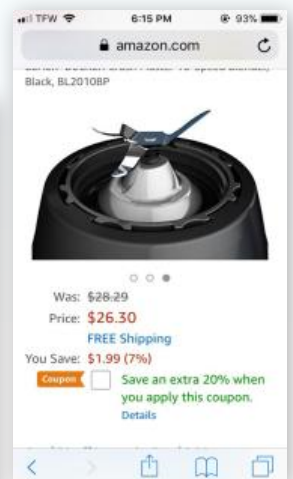
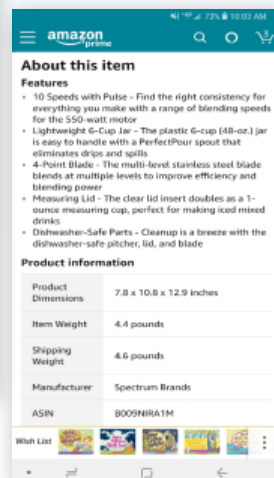
Among Group B participants who had previously shopped at Amazon.com (n = 491)

PDP SCREENSHOTS

Participants took screenshots of the most helpful feature on their assigned retailer's product detail page



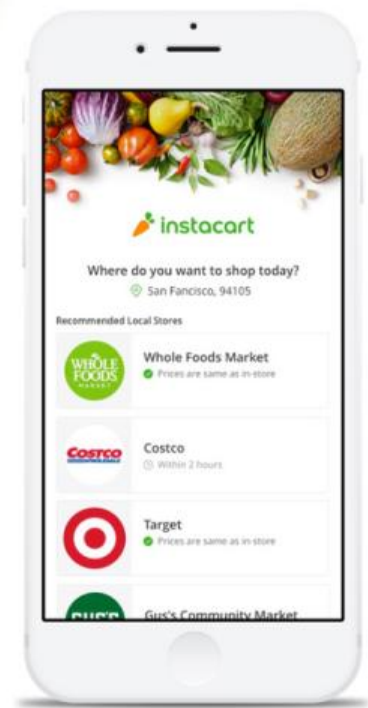
Agent Screenshots



Agent Screenshots



the instacart experience



Grocery-delivery service Instacart presently boasts an impressive—and growing—list of retail partners, including Kroger, Costco, Safeway/Albertsons, Whole Foods Market, and Sam's Club.

Field Agent recruited 20 shoppers to try and rate the Kroger-Instacart experience, from shopping for Kroger groceries online to receiving the Instacart delivery at home.

All participants were required to purchase at least \$35 of groceries, including at least one fresh item, from Kroger through the Instacart website. Every participant was a first-time Instacart user.



Click to see what shoppers think of Instacart

On a scale from 1-5, where 5 is "very good" and 1 is "very poor," rate the following dimensions of your Kroger-Instacart experience.



75% said it was easier than expected to use Instacart online

95% rated the fresh items they received as either extremely or very *fresh*

95% reported *on-time* deliveries

Of 267 total items ordered, only 6% were product or brand *substitutions*

75% of these first-time users reported being completely or very likely to use Kroger-Instacart again

easy most common words to describe instacart
convenient
fast



The Right Combination?

amazon locker

AT WHOLE FOODS

The Amazon era is in full swing at Whole Foods Market, and perhaps nothing makes this more apparent than the conspicuous presence of Amazon Lockers inside Whole Foods stores across the country. These sleek-looking lockers afford Amazon.com customers a convenient alternative to front-door, package delivery and its security and quality concerns.

Field Agent enlisted 20 shoppers to make purchases at Amazon.com, which they then designated for delivery to an Amazon Locker inside a Whole Foods Market. In all, 18 of 20 participants were first-time Amazon Locker users.



Click to see Amazon Lockers through the eyes of shoppers

90% indicated it was easy to opt for Amazon

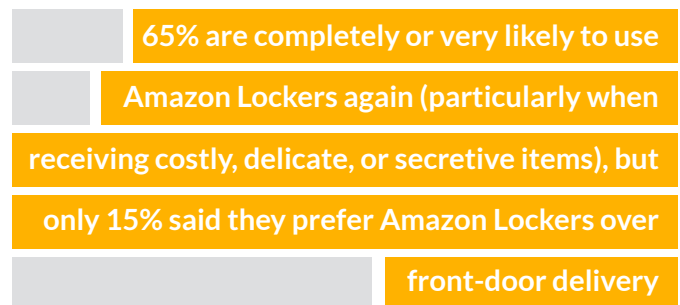
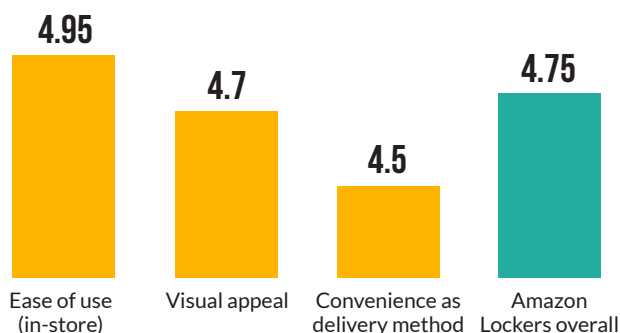
Locker delivery through Amazon.com

Very easy and cool...

If I was ordering an expensive or fragile item, I would use Amazon Lockers, otherwise I would probably just use home delivery.

- Agent Quotes

On a scale from 1-5, where 5 is "very good" and 1 is "very poor," rate the following dimensions of the Amazon Locker service.



Sizing it Up

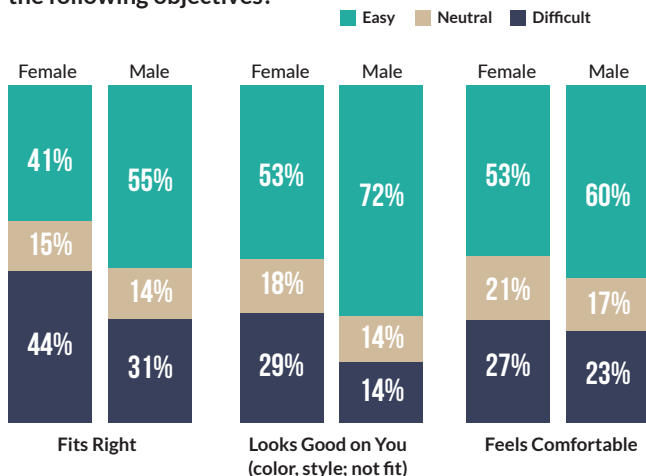
HOW COMMON IS SHOPPING FOR CLOTHES ONLINE?



Field Agent surveyed 2,091 shoppers about their online clothing purchases



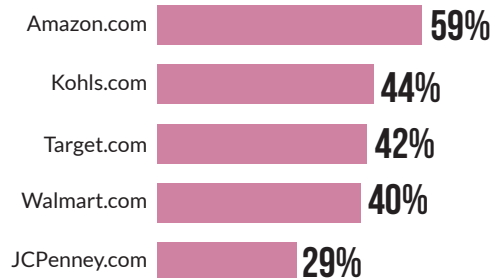
How easy/difficult is it to shop online for clothes that satisfy the following objectives?



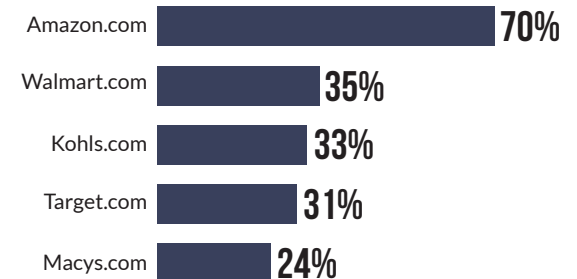
Among online shoppers who purchase clothing online (n = 1,707)
Female (n = 1,187) Male (n = 518)

From which online retailers do you purchase clothing?

WOMEN:

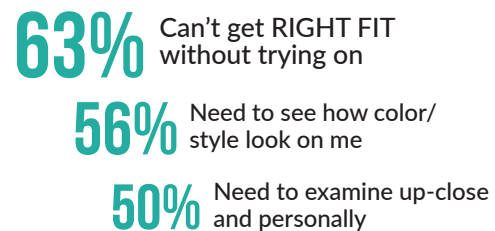


MEN:



Among online shoppers who purchase clothing online (n = 1,707)

Top 3 Reasons for NOT buying clothes online?



Among online shoppers who do not purchase clothing online (n = 321)

MYSTERY SHOPPING. REIMAGINED.

Field Agent has radically reimagined mystery shopping to offer retailers of all kinds a simpler, faster, altogether better way to collect customer experience insights. We crowdsource your customers' smartphones to gauge store experience, online experience, staff engagement, store conditions, and product usage.

Case Study:

Mobile Mysery Shop of Next Generation Walmart C-Store



Experience the Mobile Mystery Shopping Difference

- ✓ Lower costs
- ✓ Actual customer perspectives
- ✓ Photos and videos
- ✓ Real-time dashboard
- ✓ Shorter field times
- ✓ Easier store-level execution
- ✓ Shorter questionnaires
- ✓ No shopper training

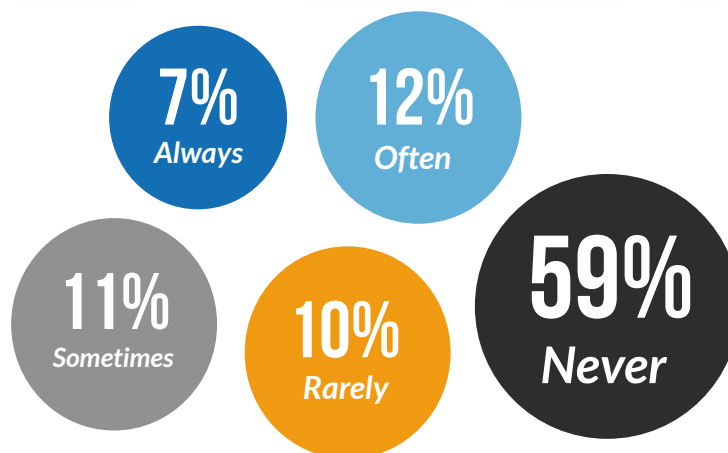
amazon smile

SHOPPING FOR A CAUSE

Field Agent wondered, do Amazon customers actually take advantage of the AmazonSmile program, which donates a portion of their purchases—at least, those transacted through the smile.amazon.com subdomain—to a charity of the shopper's choice?

To find out, we surveyed 1,863 Amazon shoppers.
We asked...

Of all the times you've shopped with Amazon, how often have you shopped through the AmazonSmile program?



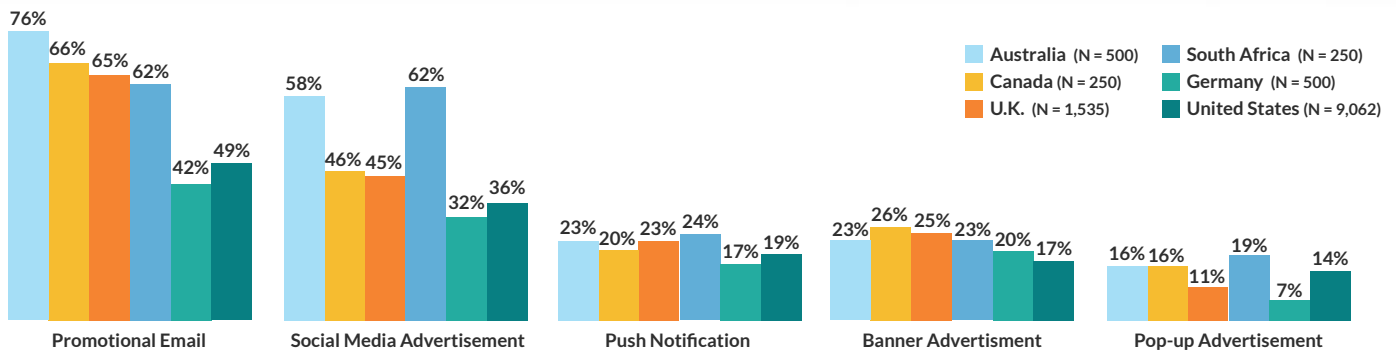
Globally Speaking: DIGITAL PROMOTION

Email is Still King

To determine the most effective digital promotions, Field Agent surveyed 12,097 shoppers across six markets

As you can see, regardless of country, email appears to be the most influential form of digital promotion, among the types presented in the survey.

What digital promotions, if any, have ever triggered shoppers to make online purchases?



A World of Insight on Digital Shoppers

With operations in eight countries and growing, Field Agent has its finger on the pulse of digital shoppers and omnichannel operations around the globe.



Special Report:

BRAND NEW WORLD

Based on surveys with thousands of shoppers, *Brand New World: Exploring the Critical Issues Facing Today's Brands*, takes an intense, data-driven look at the contemporary branding landscape



This free report examines shoppers' attitudes toward:

Private labels versus name brands

Online private label brands

"Off-brander" retail operations like Aldi and Lidl

Brand loyalty and brand-switching

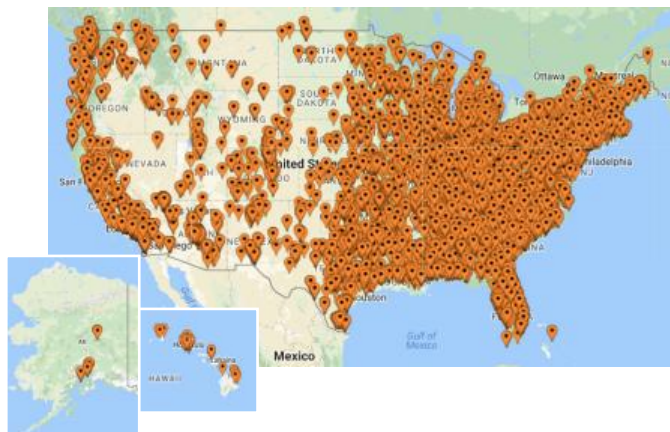
[Download the Free Report](#)

METHODS & DEMOS

The Digital Shopper encompasses 14 mobile studies across six countries, completed between February 20, 2018 and March 20, 2018. All studies were conducted entirely through the Field Agent mobile app, and all participants were adults and smartphone owners at least 18 years of age.

DOMESTIC SURVEY LOCATIONS

This report contains 15,359 unique, U.S.-based survey responses



MYSTERY SHOP LOCATIONS

This report contains 40 unique mystery shop responses



Amazon Lockers @ Whole Foods Kroger-Instacart

DEMOGRAPHICS

Cross-reference the number assigned to various pages throughout the report with the demographic information below.

STUDY 1	(N = 9,621)	STUDY 2	(N = 451)	STUDY 3	(N = 2,100)	STUDY 4	(N = 516)	STUDY 5	(N = 517)
Female:	66%	Female:	80%	Female:	66%	Female:	68%	Female:	71%
Male:	33%	Male:	20%	Male:	34%	Male:	32%	Male:	29%
18-24:	9%	18-24:	2%	18-24:	4%	18-24:	7%	18-24:	1%
25-34:	30%	25-34:	32%	25-34:	28%	25-34:	31%	25-34:	22%
35-44:	33%	35-44:	44%	35-44:	35%	35-44:	32%	35-44:	37%
45-54:	19%	45-54:	15%	45-54:	22%	45-54:	21%	45-54:	25%
55-64:	8%	55-64:	7%	55-64:	10%	55-64:	8%	55-64:	13%
65+:	2%	65+:	1%	65+:	2%	65+:	0%	65+:	2%

STUDY 6	(N = 20)	STUDY 7	(N = 20)	STUDY 8	(N = 2,091)
Female:	80%	Female:	60%	Female:	67%
Male:	20%	Male:	40%	Male:	33%
18-24:	0%	18-24:	0%	18-24:	4%
25-34:	45%	25-34:	40%	25-34:	24%
35-44:	30%	35-44:	30%	35-44:	34%
45-54:	0%	45-54:	20%	45-54:	24%
55-64:	20%	55-64:	10%	55-64:	12%
65+:	5%	65+:	0%	65+:	2%

INTERNATIONAL MARKETS:

	Australia: N = 500
	Canada: N = 250
	Germany: N = 500
	South Africa: N = 250
	United Kingdom: N = 1,535

YOUR EYES & EARS IN THE DIGITAL AGE

Wherever business takes your products, customers, and operations in the digital age, Field Agent is ready to capture pictures, answer questions, and keep you in the know about the latest digital developments. In stores, in homes, and practically anywhere in between.

Field Agent has digital retail covered.

Contact Us



FIELD AGENT PRESENTS

THE DIGITAL SHOPPER

Insights into today's Most 'Connected' Customers