

# The Rise of the Click and Collect Superconsumer

Identify and Understand North American Consumers Participating in Omni-Channel Retail



## EXECUTIVE SUMMARY

Until now, the term 'consumer' has been used in the broadest sense to encompass a general pool of shoppers. Research shows consumers want things faster, more personalized, and that they require more control over their shopping experience. North American retailers are working hard to meet the ever-growing needs of these customers.

However, retailers need more targeted information.

With significant investments being made to transform retail operations across the country, how are retailers to know who is best served by these changes? Who are the specific people within the broad "consumers" group who value omni-channel retail and are already leveraging multiple channels when shopping? By identifying these consumers who are currently and frequently participating in omni-channel retail, retailers can better position their business according to those items favored by this consumer.

For retailers this ideal consumer is the *Click and Collect Superconsumer*. The *Superconsumer* shops online on average 45 times a year, spend an additional \$40 extra on unplanned purchases when picking up an Click and Collect order, and returns significantly fewer items than other consumer groups. Don't you want her to shop at your retail brand?

### *Who is this research for?*

- ✓ *Retailers who want to improve their current omni-channel retail operations.*
- ✓ *Retailers who have yet to enter the world of omni-channel and require the justification to do so.*



## CONTENTS

<b>Executive Summary</b>	<b>1</b>
<b>Meet the Click and Collect Superconsumer</b>	<b>2</b>
<b>Research Methodology</b>	<b>4</b>
<b>Four Click &amp; Collect Consumer Groups</b>	<b>5</b>
<b>The Click and Collect Superconsumer</b>	<b>7</b>
<b>The Click and Collect Occasional Consumer</b>	<b>8</b>
<b>Click and Collect Factors</b>	<b>9</b>
<b>Key Findings</b>	<b>16</b>

## MEET THE CLICK AND COLLECT SUPERCONSUMER

The *Click and Collect Superconsumer* likes to shop, whether online or in-store. The *Superconsumer* skews female, makes a good income, and is 24-49 years old. She enjoys the experience of shopping, likes to touch and feel the products she is going to purchase and has been leveraging the power of omni-channel retail for at least two years.



**24 - 49**  
Years Old

**\$50,000 -  
\$100,000+**  
Annual Income

**Female**

**2+ Years**  
Using Click and Collect

## RESEARCH

This study was commissioned in Q2 2017 by OrderDynamics.

### Methodology

The research involved a quantitative online survey that was run among 1600 North American online shoppers. The categories of interest were Electronics, Toys, Clothes, Footwear, Furniture, Sporting goods, Photography equipment and Jewelry. Grocery was not in scope for this study.

The respondents had the following characteristics:

### Research Objectives

1. To identify the definitions & distinctions between different Click and Collect consumers.
2. To understand what drives the Click and Collect Super-consumer.
3. To present the data to retailers who will create value in their omni-channel business with the data.

## Geography



**90%** | **10%**  
USA | Canada

## Age



**18 - 65**

## Gender



**50%** | **50%**  
Female | Male

N=1631

## RESEARCH

### Researchers

[Clearly Research](#) executed the core research. With 25 years of experience in market research and new product development with major Consumer Packaged Goods and food companies, Clearly Research provides business recommendations that are actionable and practical. These deliver market results. The research design is architected and specifically designed to answer retail business questions with data analysis that makes complex things easy to understand.


### Chaid Analysis

The Chaid analysis identifies the strongest correlations between variables and target. It allows for treeing and may show additional significance at sub group level. In this study, researchers undertook to understand the key differences between the Click and Collect Superconsumer and Occasional Consumer.

To see a copy of the Chaid Analysis for this research, please [contact OrderDynamics](#) directly.

## REFERENCES

1. "The State of Retailing Online 2017: Key Metrics, Business Objectives and Mobile" NRF. 2017. <http://bit.ly/2IXkvPq>

A graphic of a red percentage tag with a white percentage symbol and a string, positioned over the bottom right corner of the text box.

*Retailers need to understand who the Superconsumer is, and which parts of the omni-channel process she values, in order to grow their business and remain competitive.*

## INTRODUCING THE FOUR CLICK AND COLLECT CONSUMER GROUPS

Also referred to as an omni-channel consumer, the **Click and Collect consumer** is defined as a consumer who orders items online and picks the merchandise up in a store or another location. As an active participant in omni-channel retail, the Click and Collect consumer has identified benefits of the process and has selected the Click and Collect, or Buy Online, Pickup In Store (BOPIS) as their preferred shopping method.

### **Four distinct Click and Collect consumer groups were identified in this study.**

Within the 1600 North American research participants of this study, we found four distinct Click and Collect consumer groups. These include: *Superconsumer, Occasional, Non-User and Lapsed Consumers*. Together, the Click and Collect Superconsumer and Occasional Consumer groups account for over 50% of those 1600 North American shoppers.

## **What is the Influence of Gender on Omni-Channel Retail?**

*One of the main findings of this research is that the Occasional Consumer skews male and the Superconsumer skews female.*

*Historically, women were seen as gatherers and men were hunters. They shop differently. Women are experiential and enjoy the shopping process while most men like to shop quickly. Speed and efficiency are important to them. These characteristics manifest themselves in the click and collect world as well.*



## DEFINITIONS OF THE FOUR CLICK AND COLLECT CONSUMER GROUPS

*Click and Collect Superconsumers* are defined as people who use Click and Collect 2 - 8+ times in the last 12 months. They are the heavy Click and Collect users.



*Occasional Consumers* are defined as people who used Click and Collect at least once in the past 12 months. They are moderate users of Click and Collect.



*Click and Collect Non-User* are defined as people who shop online but do not use the Click and Collect pickup method.



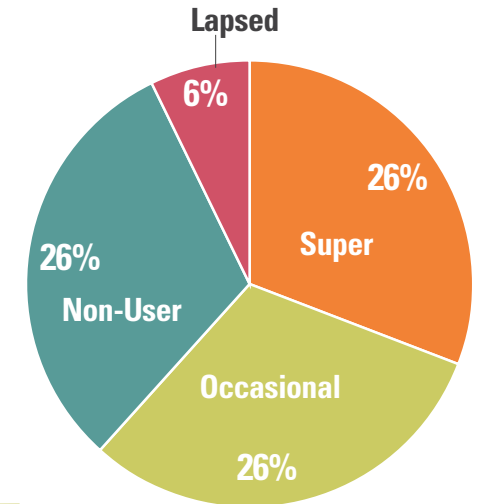
*Lapsed Click and Collect Consumers* are defined as people who have used Click and Collect in the past but have not used it in the last 12 months.



## DEMOGRAPHICS OF THE FOUR CLICK AND COLLECT CONSUMER GROUPS

Within the 1600 respondents, 26% was *Superconsumers*, 26% was *Occasional Consumers*, 26% was *Non-Users* and 6% was *Lapsed*. Furthermore, to form a base of the perfect Click and Collect target market, specific demographics were identified. With the four distinct Click and Collect consumer groups the following was noted:

## BREAKDOWN OF RESPONDENTS



<b>Age:</b>	Ages 24 - 49
<b>Gender:</b>	Female
<b>Income:</b>	\$50,000 - \$100,000+
<b>Use:</b>	Used C&C 2+ years

**Super**

<b>Age:</b>	Ages 18 - 65
<b>Gender:</b>	Male
<b>Income:</b>	\$0 - \$100,000+
<b>Use:</b>	Used C&C 1 year or less

**Occasional**

<b>Age:</b>	Ages 18 - 23 & 50 - 64
<b>Gender:</b>	Female
<b>Income:</b>	\$0 - \$50,000
<b>Use:</b>	Not Applicable

**Non-User**

<b>Age:</b>	Ages 35 - 49
<b>Gender:</b>	Male
<b>Income:</b>	\$0 - \$100,000+
<b>Use:</b>	Not Applicable

**Lapsed**

N=1631

# The Click and Collect Superconsumer

## THE CLICK AND COLLECT SUPERCONSUMER

The *Click and Collect Superconsumer* is predominantly female, in her late 20s to late 40s, makes a medium to high income, and has been committed to Click and Collect for at least two years. She will often buy additional items when picking up her purchases in store, and rates customer experience as very important. This consumer *enjoys* shopping.

### Shopping With the *Click and Collect Superconsumer*...

**Clear instructions for pickup are very important**

**Pickup from a nearby store is very important**

**Pleasant pickup experience is very important**

**Prefers returning items in-store**

**Purchased several additional items when returning a item**

**Bought several additional items on pickup**



**When shipping to home it is important that items are shipped in one box**

**Shops online once a week/few times a month**



## THE CLICK AND COLLECT OCCASIONAL CONSUMER

In contrast, the *Click and Collect Occasional Consumer* is predominantly male, and is less committed to buying online and picking up in store. He is extremely efficient and is less likely to pick up unplanned additional items when picking up an order. This consumer is a transactional buyer.

### Shopping with the *Click and Collect Occasional Consumer*...

**Chooses home delivery over Click and Collect more often**

**Has been using Click and Collect for less than a few months**

**Wants item ready immediately or within an hour**



**Very important to be able to pick up from a pickup locker**

**Wants more than one notification method**



**Prefers returning items through mail**



**Purchase only one or no additional items when picking up merchandise**

**Shops online once a month or only on special occasions**



## CLICK AND COLLECT FACTORS

### Shopping Online

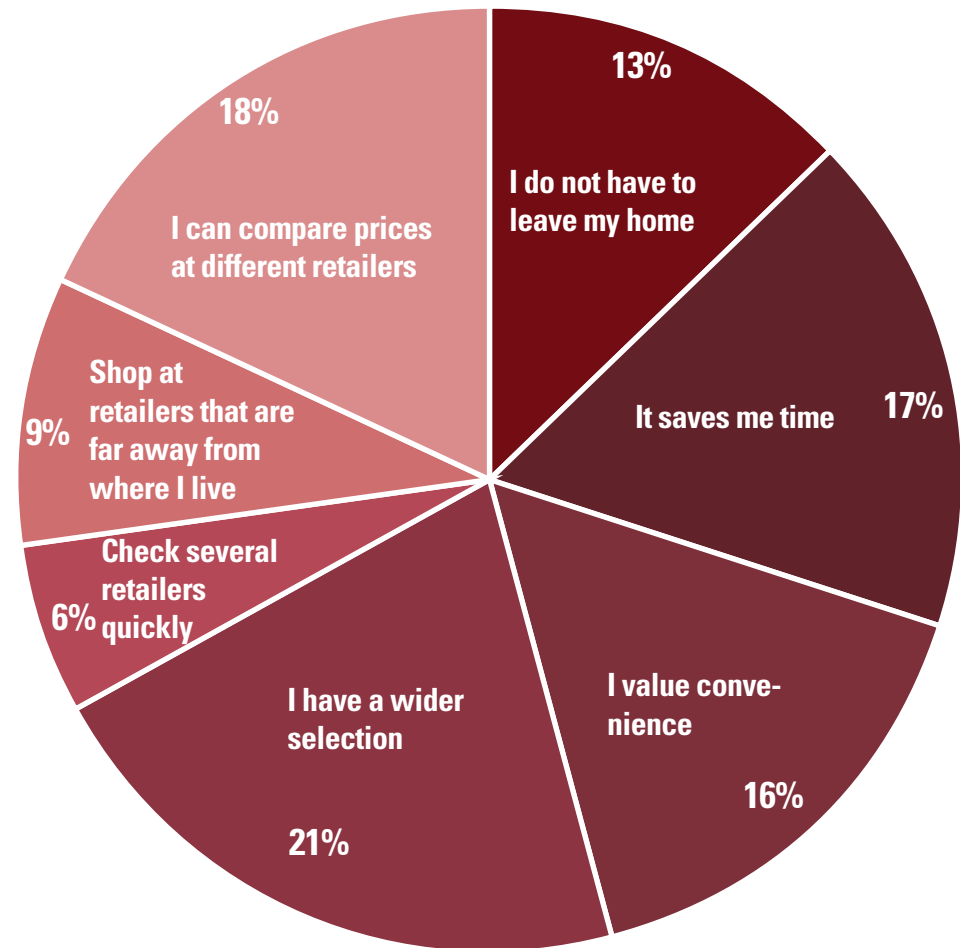
For the *Superconsumer*, comparing prices at different retailers is the main reason for shopping online. Benefits for online shopping differ depending on the age of the consumer. The consumers who claim, "It saves me time" and "Shopping at retailers far from home" as their main reason, are younger shoppers, between the ages of 18 and 23 years. Those who are 24-64 years old were more likely to claim "I can compare prices at different retailers" as a motivator. "I value convenience" was cited by consumers between the ages of 24 and 49 years as their main reason for shopping online.

**Click and Collect consumers want big savings – on their time.**

*"The checkout lanes always take too long. Most of the time I spend at least 30 minutes waiting in line to check out - which is longer than I spend in the store collecting everything I intend to buy. The selection of sizes and colors is much better online. You know what is in stock and you have many choices of different retailers"*



## WHY DO YOU SHOP ONLINE?



Among All Online Shoppers  
N=1631

## Online Shopping Frequency

How often each of the click and collect consumer groups shops online also differ significantly with *Superconsumers* shopping online an average of 45 times per year vs the *Occasional Consumer* who shops an average of 39 times a year. The *Non-Click and Collect Consumer* shops an average of 31 times a year and the *Lapsed* an average of 27 times a year.

In fact, 31% of *Superconsumers* and 25% of *Occasional Consumers* shops online at least once a week.

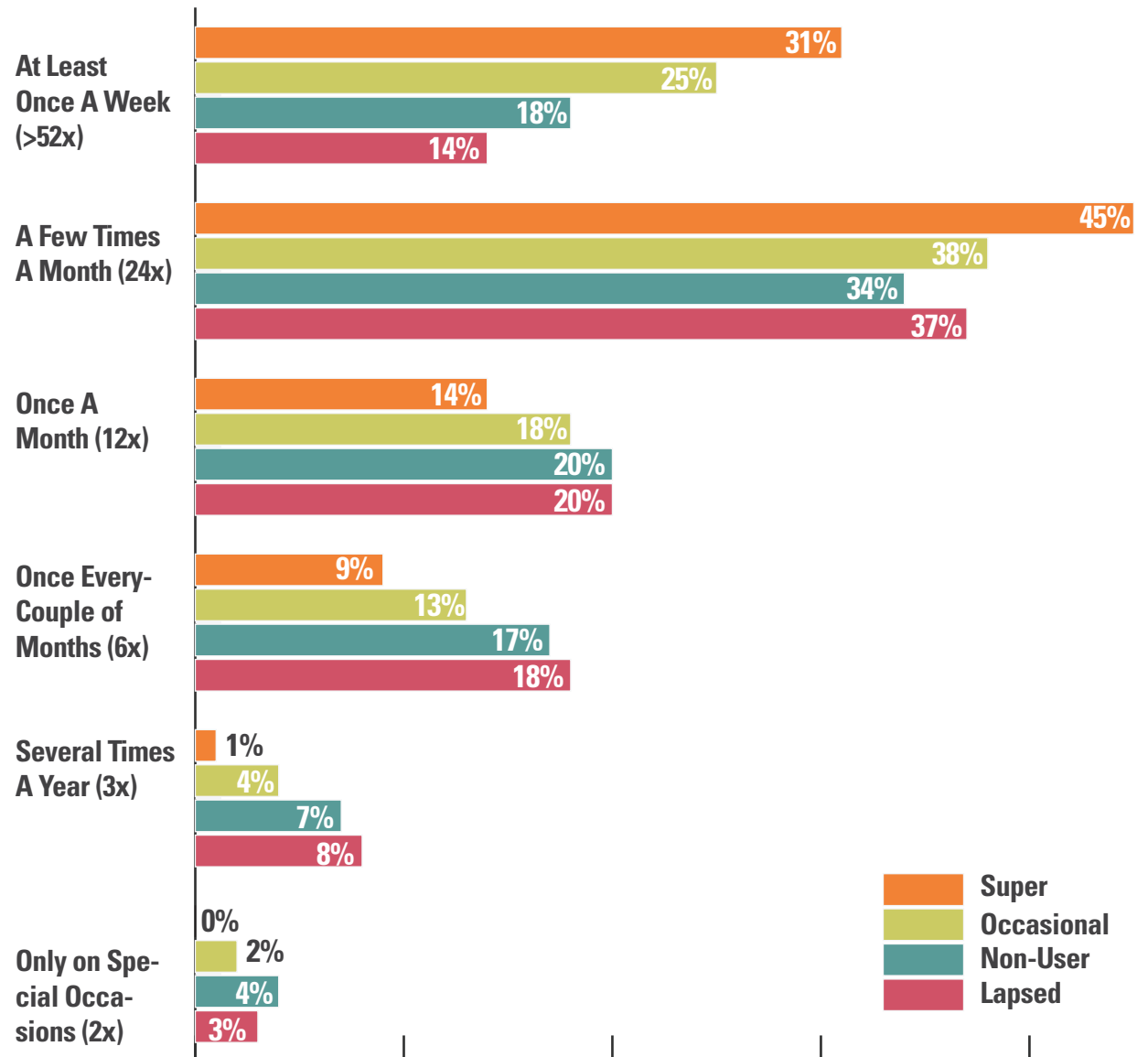
What is interesting here is that Click & Collect *Superconsumers* are more frequent shoppers. This in itself is good reason for why retailers want to offer omni-channel services to attract this frequent shopper.

### Superconsumers LOVE to shop on every channel

Click and Collect Superconsumers are heavy shoppers and shop more often than Occasional, Non-Click and Collect and Lapsed Consumers. They claim to have shopped online (not only click and collect) on average 45 times a year.



## HOW OFTEN DO YOU SHOP ONLINE?



N=1631

## Click and Collect Usage

Significantly more *Superconsumers* used the Click and Collect system longer than 2 years compared to *Occasional consumers*. This indicates that when certain people experience the benefits of Click and Collect shopping, they love it and become loyal to it.

When asked how long consumers have been using the Click and Collect method of shopping, significantly more *Occasional Consumers* have been using it for just a few months or less (33%) than *Superconsumers* (17%).



*"As much as I shop online, I still enjoy walking around a physical store - window shopping. I like to see and touch the product. When you shop online, you cannot touch the product. Sure, I shop online but I still like shopping in stores."*

***Click and Collect is a necessity for some consumers.***

*"I want to see the items first and for shoes there is no other way. My feet are painful and sensitive. I have to fit my shoes in person."*



## Notification Methods

The *Occasional Consumer* appreciates more than one notification method of order readiness. These methods include email, text message, phone call, etc.

## Customer Experience

With the growth of online shopping, store environment continues to be very important. For the *Superconsumer*, the ability to experience (see, - touch, -feel, - try) online purchases before completing an order pickup and leaving the store is very important.

Making the store environment pleasant and efficient in addition to providing clear pickup instructions will increase the frequency of shopping done at retailers with Click and Collect services.

Retailers often position the pickup desk at the back of a store to encourage browsing behaviour and merchandise discovery. However, it is extremely important to make this pickup experience easy, fast and pleasant. That encourages repeat omnichannel purchases. Show the pickup desk clearly, and make it visible from a distance. Making it easy will make it memorable....which will be repeat experiences.

### **Communication is Critical in Click and Collect**

*"I prefer shopping at places that keep me informed via text or email of your expected delivery and tracking information. Some retailers give vague expected delivery dates and then do not provide any follow up, such as tracking information."*

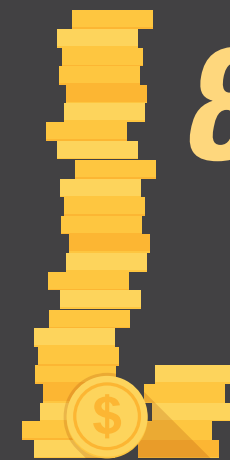
## Are mobile devices the ultimate omni-channel IT items for Click and Collect Superconsumers?

16%



Mobile app sales annual growth rate<sup>1</sup>

89%



Of retailers plan to increase mobile initiative investments<sup>1</sup>

## Purchase Pick Up

### Location

The ability to pick up an order from a nearby store is important to both the *Superconsumer* and *Occasional Consumer*. For female *Superconsumers*, providing this convenience increases their overall satisfaction with the overall Click and Collect experience. It also follows their aptitude for buying additional items during pickups and returns. For male *Superconsumers*, the availability of a nearby store helps them return goods more efficiently.

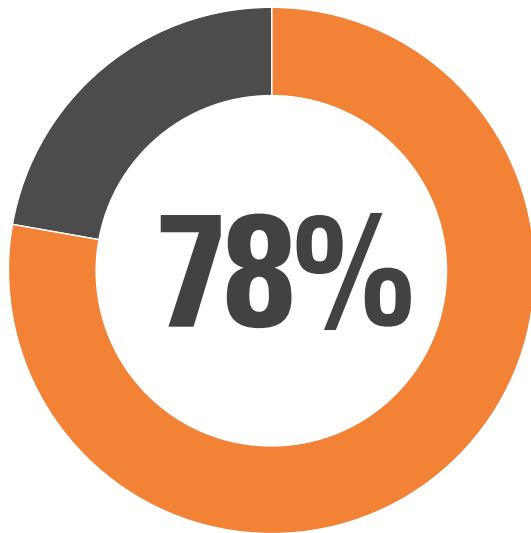
### Timing

When participants were asked "For the online order and in-store pick up, when should the item be ready?" - there was no dramatic difference in expectations between different types of shoppers. The majority of shoppers claimed they wanted the goods to be ready in 24 hours or less, with 53% of *Occasional Consumers* wanting the item to be ready, in store, for pick up in 2 hours or less. Today's omni-channel retailers may want to take note. This is specifically important to retailers offering a non-committal 3 - 7 day for pickup availability.



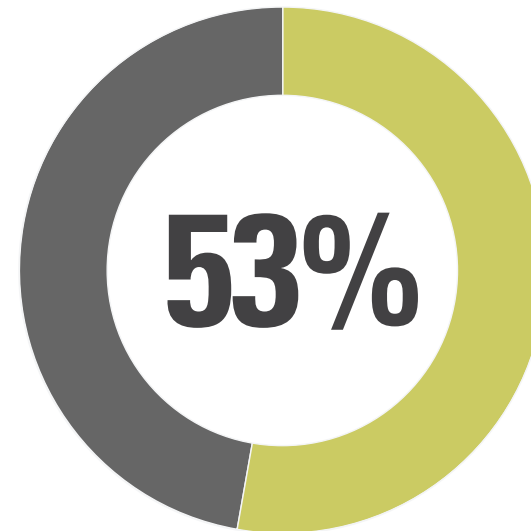
**Customers have ideas about how to improve Click and Collect**

*"A fitting room beside the Click and Collect pick up area in store would make my experience even better."*



**Superconsumers want Click and Collect orders ready in 24 hours or less**

N=504



**Occasional Consumers want Click and Collect Orders ready in 2 hours or less**

N=502

## Additional Purchases

Approximately 37% of all online shoppers have made an additional unplanned purchase when they picked up their item in store on their last visit.

*Click and Collect Superconsumers*, on average, claimed to buy additional items significantly more than any other type of shopper (41% of time they did a click and collect visit).

Respondents who claimed to make additional purchases during their last Click and Collect trip - were asked to estimate how much additional money was spent. On average, *Occasional Consumers* spent \$37 and *Superconsumers* spent \$40 on unplanned purchases.

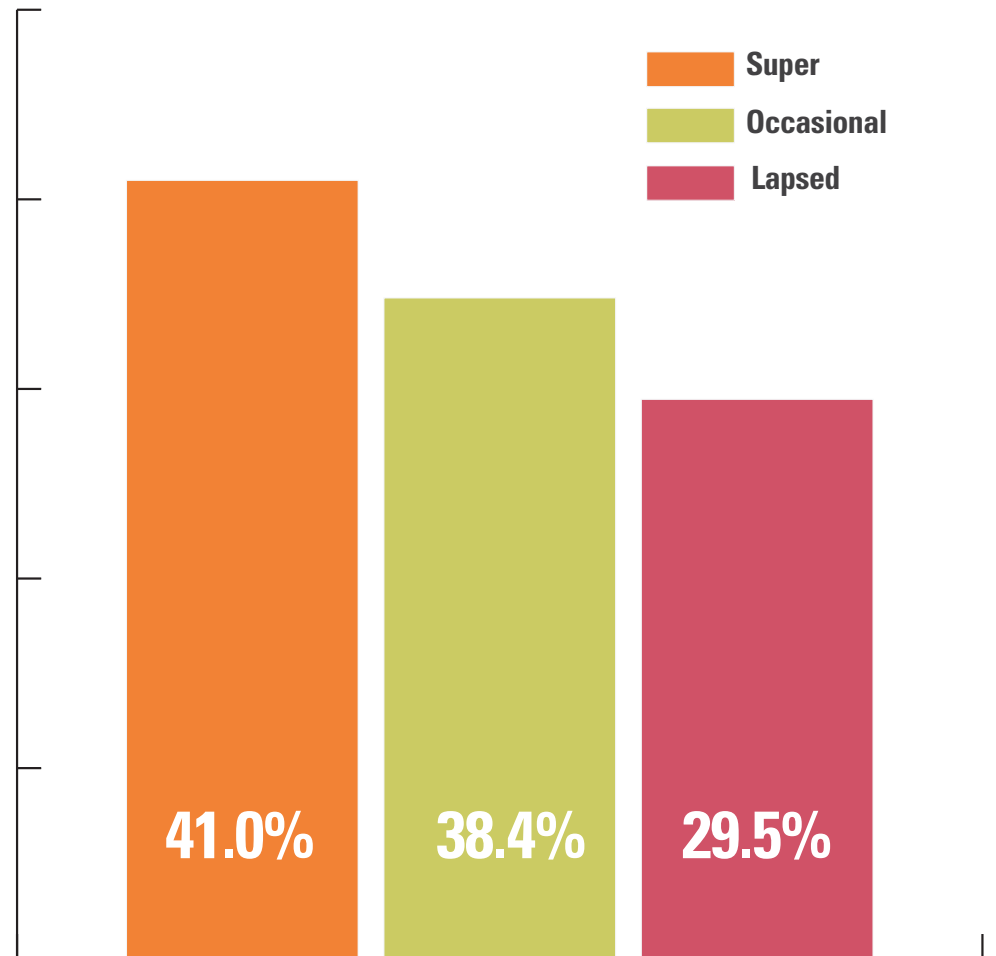


**Superconsumers average extra spend on unplanned additional purchases**



**Occasional Consumers average extra spend on unplanned additional purchases**

## HOW OFTEN CONSUMERS BOUGHT ADDITIONAL UNPLANNED ITEMS ON AN INSTORE PICKUP (% OF TIME)



N=597

## Returns

### Importance

The return process is very important to *Superconsumers* and *Occasional Consumers*, more so than to *Non-* and *Lapsed Consumers*. 50% of each group rated it as Very Important.

### Return Method

More *Occasional* and *Non-Click and Collect Consumers* prefer to make returns by mail or courier. Significantly more *Superconsumers* - 70% - prefer to return merchandise in store and in person as compared to *Occasional*, 58%, which is also high.

### Frequency

*Occasional Consumers* tend to return items frequently, on average 39 times a year and significantly more than any other type of consumer. *Superconsumers* make returns only 19 times per year on average. This could include returns for purchases via any channel such as online or instore.

### Additional Purchases

Similar results to when consumers picked up click & collect orders were found when consumers returned items to the store. 43% of *Occasional Consumers* and 53% of *Superconsumers* purchased additional unplanned items when they came to the store for a return.



**SUPERCONSUMER**

**70%**

**Prefer to return items in-store**

**19**

**Average returns per year**

**53%**

**Buy additional items when instore  
for a return**



**OCCASIONAL CONSUMER**

**58%**

**Prefer to return items in-store**

**39**







**Average returns per year**

**43%**






**Buy additional items when instore  
for a return**

## THE BOTTOM LINE ON THE SUPERCONSUMER





### Why Do You Want the Superconsumer?

-  Superconsumers shop significantly more than other consumers
-  More Superconsumers purchase additional unplanned items on click and collect in-store pickup
-  Superconsumers more often purchase additional unplanned items on click and collect in-store pickup
-  Superconsumers spend more on additional unplanned purchases on click and collect in-store pickup
-  Superconsumers returns significantly less items
-  Significantly more Superconsumers buy additional items when making a return

### What Does the Superconsumer Want?

-  The in-store experience is extremely important - they want to be able to see, touch, feel and try their purchase before leaving the store with it.
-  To be able to pick up orders from a nearby store
-  To be able to pick up click and collect orders within 24 hours
-  The returns process is very important in choosing where they will purchase
-  They prefer to return items in store

## Who is the Click and Collect Superconsumer?

-  Female
-  24 - 49 Years Old
-  \$50-100K+ Income
-  Using Click and Collect for 2 years+



## OTHER RETAIL RESOURCES ONLY FROM ORDERDYNAMICS



### Omni-2000 Global Research

#### Discover Retailers' Omni-Channel Capabilities

Following up from the Omni-1000, the Omni-2000 Global Research will examine the omni-channel capabilities of over 2000 retailers from the customers perspective. Want to know how many retailers are really offering click and collect in your region? Then make sure you don't miss this report.

Download now at [bit.ly/od-omni2000-global](http://bit.ly/od-omni2000-global)



### Real OMS Whitepaper

#### What Features Should Truly be in Your OMS?

Your Order Management System sits at the heart of your omni-channel strategy. But often this core retail technology is implemented as an afterthought. What features should your Order Management System really have and what questions should you as your OMS vendor before implementing your system?

Download now at [bit.ly/od-real-oms](http://bit.ly/od-real-oms)



### Browns Shoes Case Study

#### Want to Decrease Your Order Lead Time?

Getting online orders out to customers fast is essential in today's retail world. Find out how Browns Shoes was able to not only significantly decrease their order lead time but also ensure that they did not sell out-of-stock merchandise. Find out how Browns Shoes is leading the way with Retail Order Consolidation.

Download the Case Study at [bit.ly/od-browns-cs](http://bit.ly/od-browns-cs)



OrderDynamics, now part of the Tecsys family, is the world's leading cloud-based, Out-of-the-Box Distributed Order Management Technology provider. Focused on powering retail fulfillment, OrderDynamics helps clients make omni-channel retail a reality. Their DOM provides client capabilities like order orchestration, enterprise-wide inventory visibility, returns management, customer service, and store driven fulfillment.

OrderDynamics enables customer options like Buy Online Pickup In-Store (BOPIS), and ship-from-store, creating exceptional shopping experiences. Iconic brands like Speedo, Quiksilver, Columbia Sportswear, JYSK, Princess Auto, Crabtree and Evelyn, DeFacto and Browns Shoes use OrderDynamics technology across North America, Europe, Asia and Australia.



## CLEARLY RESEARCH

VISION THROUGH ANALYSIS

Clearly Research is a boutique consultancy firm that specializes in innovative end-to-end Qualitative and Quantitative market research techniques. Clearly Research helps companies to design their marketing and retail strategies to maximize their return on marketing and advertising investment. Using effective research approaches and data analysis that makes complex things simple and easy to understand, they create actionable business recommendations and help companies win in market.

## ORDERDYNAMICS CORPORATION

Visit [www.OrderDynamics.com](http://www.OrderDynamics.com) for more information about Order Management Systems and how we can help optimize your Omni-Channel Retail Business

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