

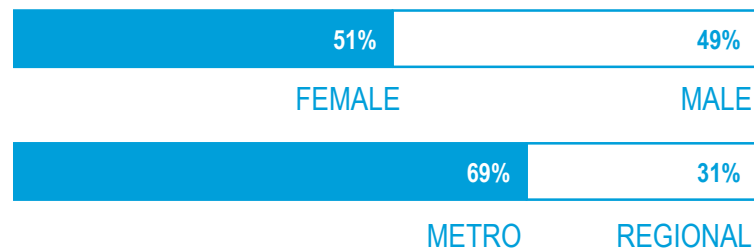
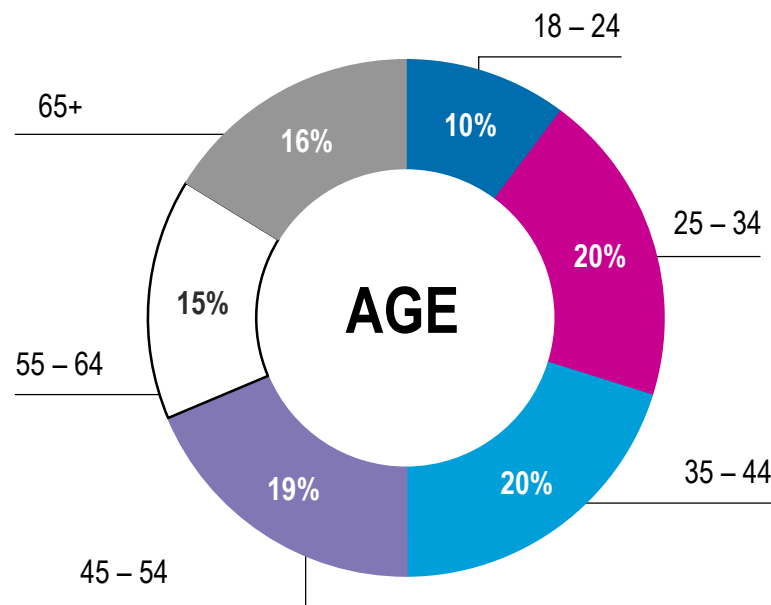
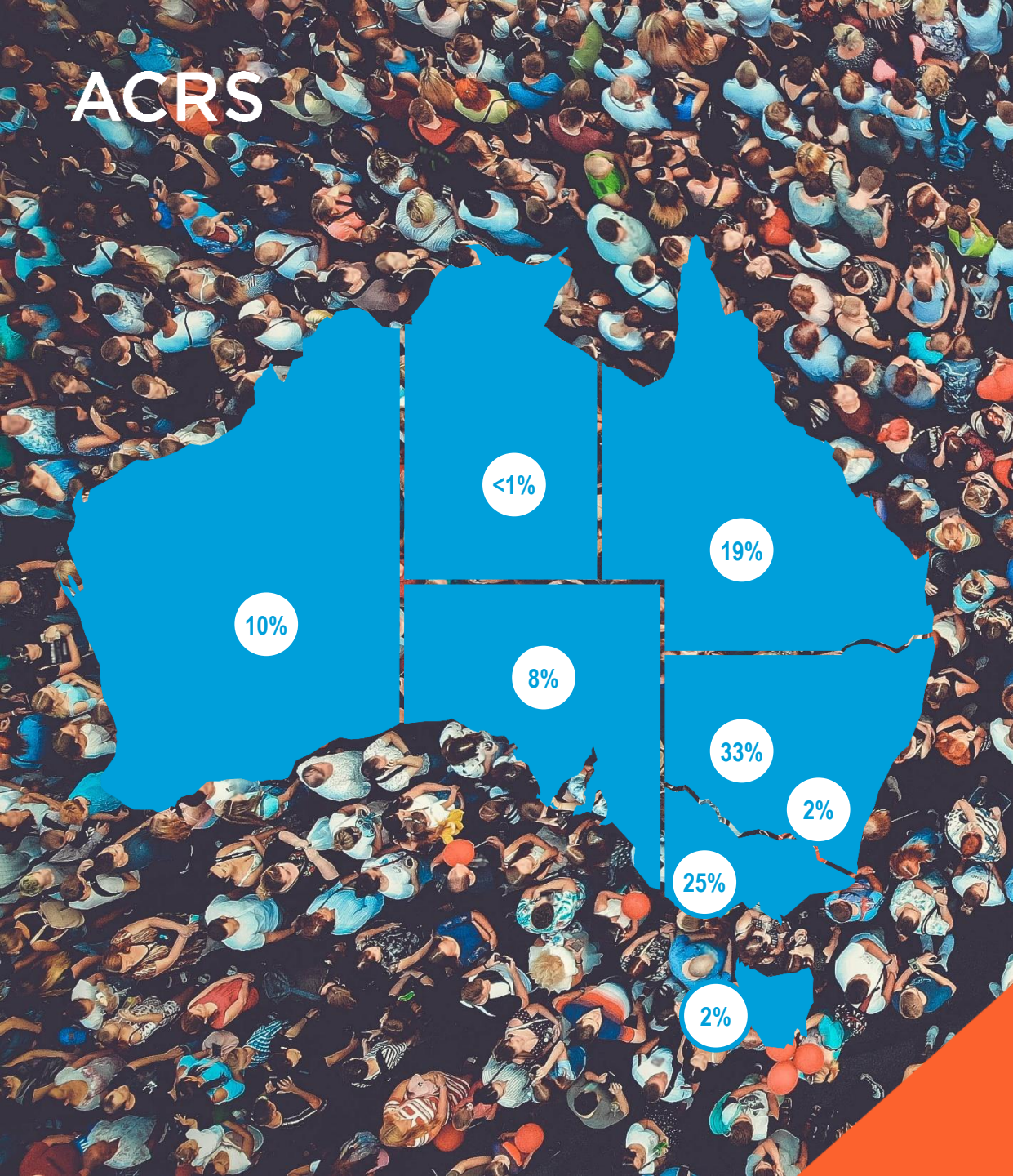
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RETAIL MONITOR

September 2022



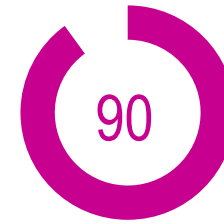
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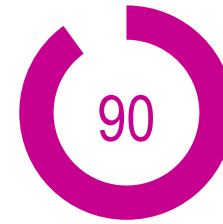
The ACRS Retail Monitor is an annual study that monitors consumers' shopping preferences and behaviour, based on an online survey of 1005 Australian shoppers. Data was collected between 29 August – 5 September 2022.

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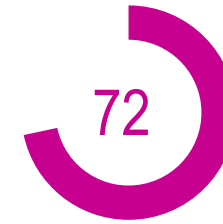
PRICE AND QUALITY WERE THE MOST IMPORTANT FACTORS WHEN NON-GROCERY SHOPPING



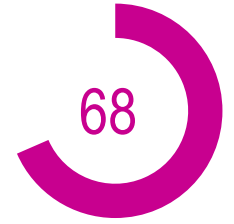
PRICE



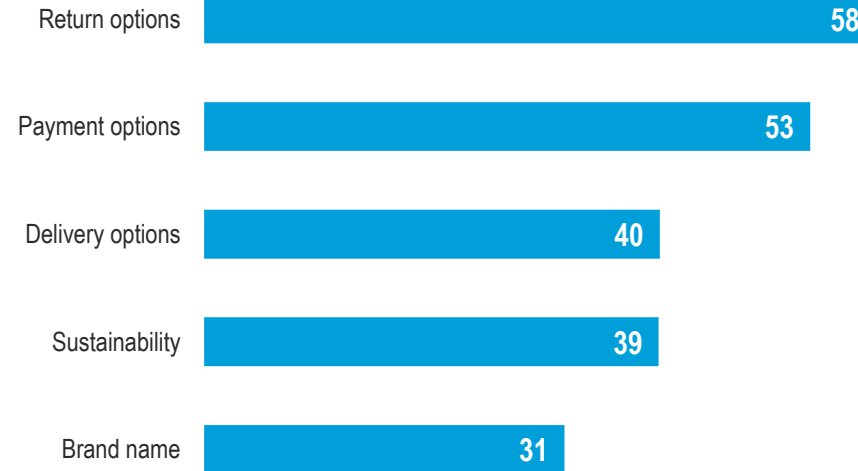
QUALITY



CUSTOMER SERVICE



SALES & PROMOTIONS

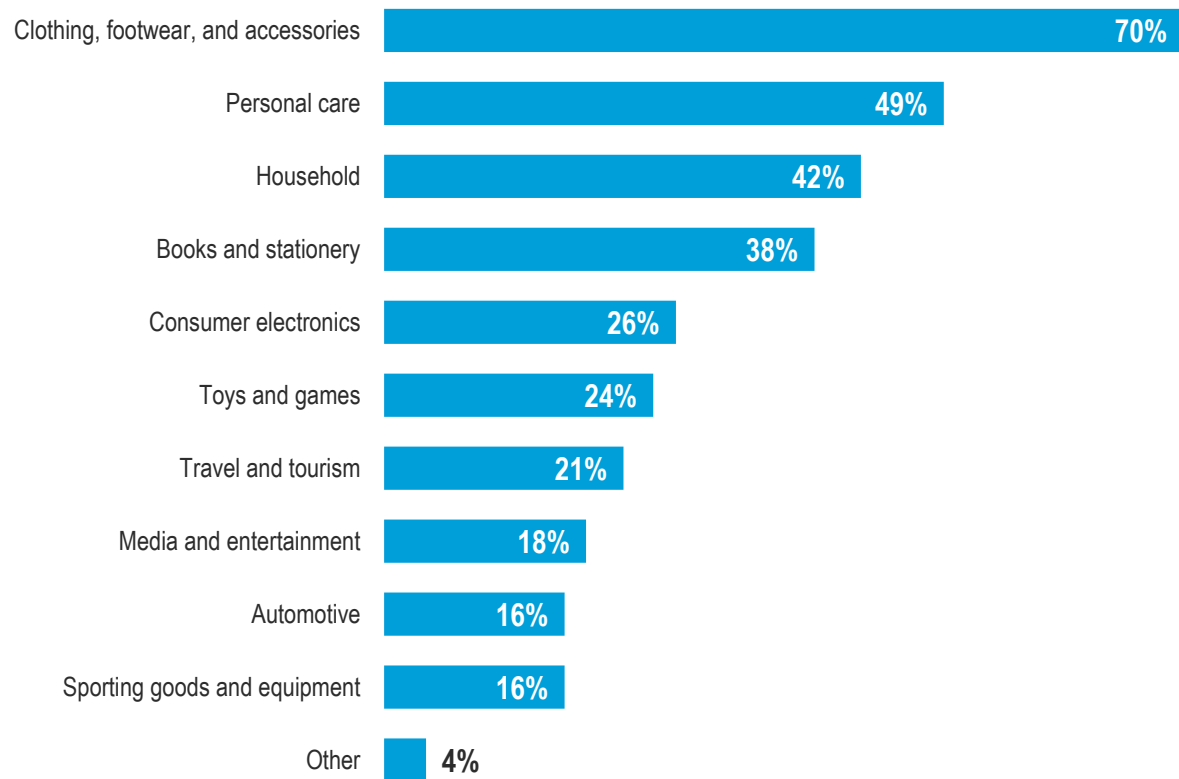


HOW IMPORTANT ARE THE FOLLOWING FACTORS WHEN YOU ARE MAKING A NON-GROCERY PURCHASE?

Note: Sample size = 1005; Scores are computed based on the sum of participants who rated Important and Very important subtracted by the sum of participants who rated Not at all important and Unimportant

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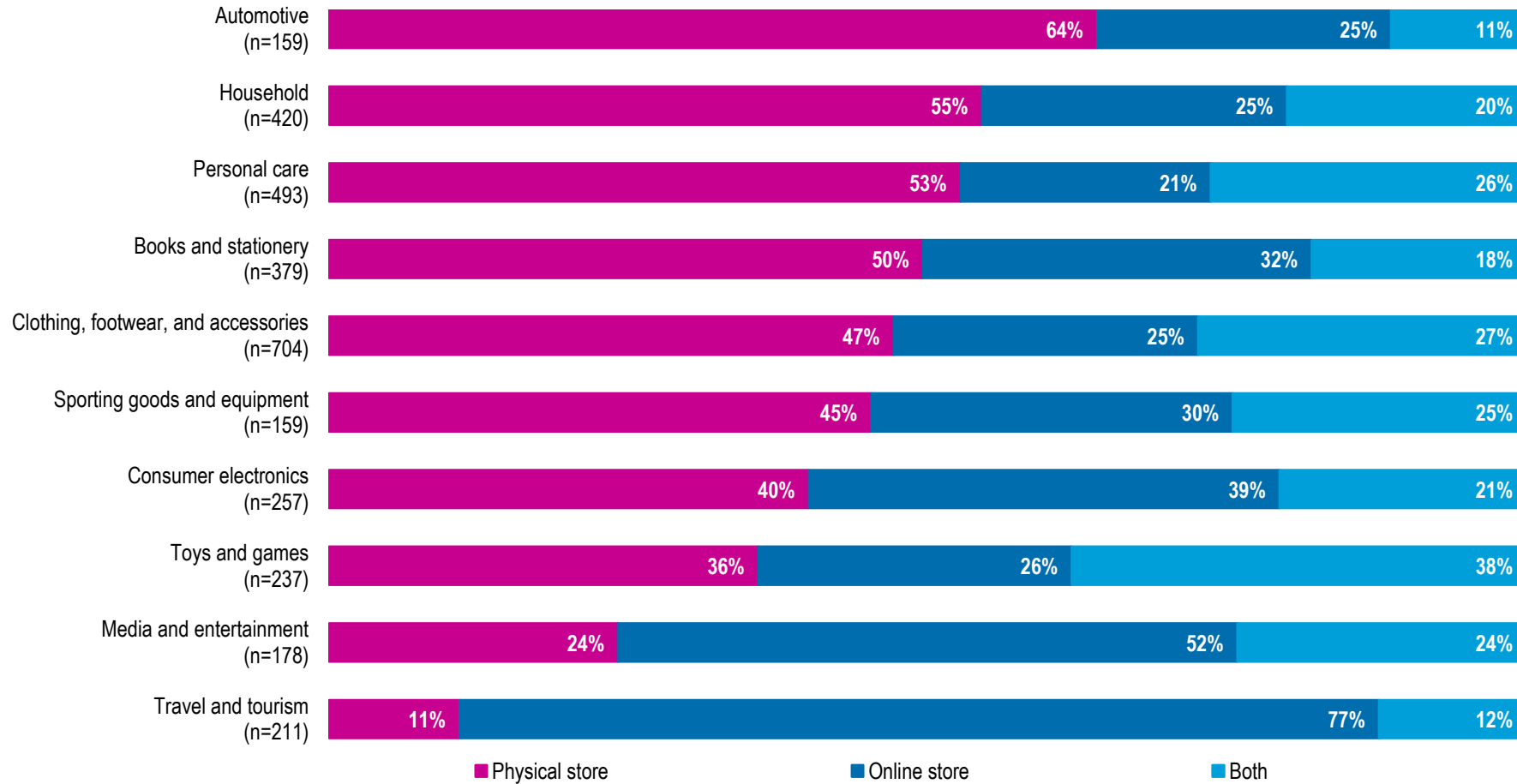
IN THE LAST THREE MONTHS, **70%** OF AUSTRALIAN SHOPPERS PURCHASED **CLOTHING, FOOTWEAR AND ACCESSORIES**



WHAT TYPE OF NON-GROCERY PRODUCTS HAVE YOU PURCHASED IN THE LAST THREE MONTHS?

Note: Sample size = 1005; This was a multiple choice question as such percentages do not add up to 100%

RECENT PURCHASES WERE MOSTLY MADE IN **PHYSICAL STORES**

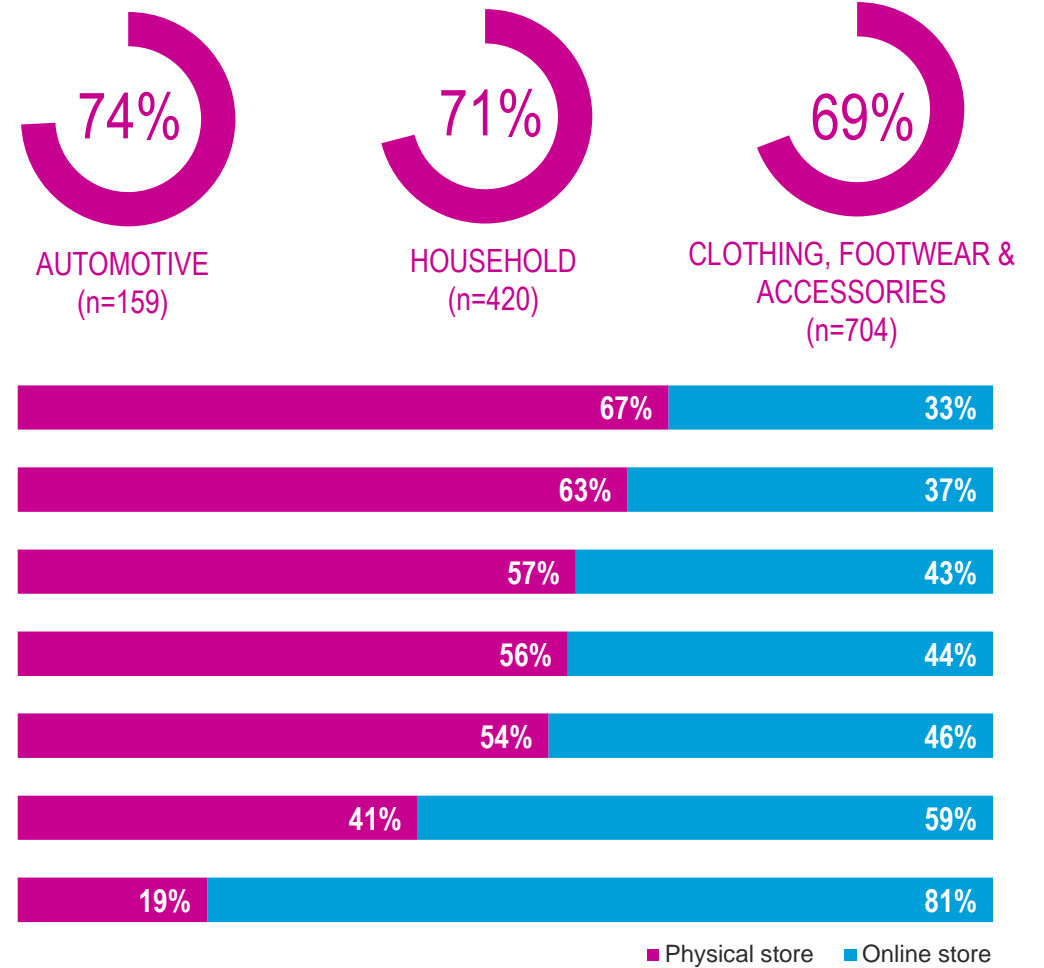


AND IN THE LAST THREE MONTHS, DID YOU PURCHASE THE FOLLOWING TYPES OF PRODUCTS IN A PHYSICAL STORE, ONLINE STORE OR BOTH?

Note: Sample size = 1005; Percentages may not add up to 100% due to rounding

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PHYSICAL STORES WERE PREFERRED OVER ONLINE STORES IN MOST PRODUCT CATEGORIES

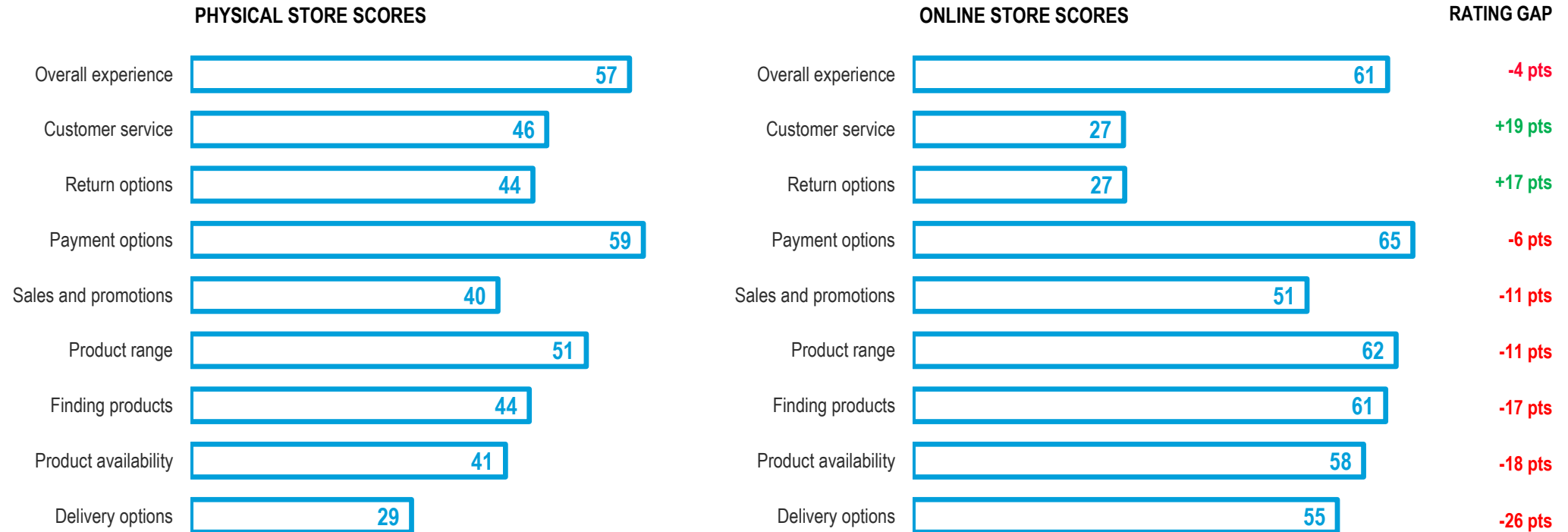


GIVEN THE CHOICE, WOULD YOU MOST PREFER TO PURCHASE THE FOLLOWING TYPES OF PRODUCTS IN A PHYSICAL STORE OR ONLINE STORE?

Note: Sample size = 1005

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ALTHOUGH PREFERRED, PHYSICAL STORES ARE RATED LOWER THAN ONLINE STORES FOR OVERALL EXPERIENCE AND MOST STORE ATTRIBUTES – INDICATING HIGHER EXPECTATIONS OF THE FORMER



HOW WOULD YOU GENERALLY RATE YOUR EXPERIENCE WITH PHYSICAL/ ONLINE STORES ON...

Note: Scores are computed based on the sum of participants who rated Very Good and Excellent subtracted by the sum of participants who rated Poor and Fair ;

Total sample size = 1005; Physical shopper sample size = 841, Online shopper sample size = 738

STANDARD DELIVERY WAS THE MOST FREQUENTLY USED DELIVERY METHOD FOR ONLINE PURCHASES

DELIVERY/ COLLECTION METHODS	SAME DAY	EXPRESS	STANDARD	IN-STORE CLICK-AND-COLLECT	OTHER CLICK-AND-COLLECT	DOWNLOAD/ STREAMING
Automotive	12%	9%	53%	19%	7%	0%
Books and stationery	5%	10%	62%	12%	4%	7%
Clothing, footwear, and accessories	2%	13%	71%	12%	2%	1%
Consumer electronics	3%	18%	60%	14%	4%	1%
Household	3%	12%	69%	13%	3%	1%
Media and entertainment	5%	10%	48%	12%	3%	22%
Personal care	3%	13%	66%	16%	2%	0%
Sporting goods and equipment	2%	13%	52%	26%	6%	1%
Travel and tourism	6%	6%	22%	7%	4%	54%
Toys and games	3%	8%	63%	20%	3%	3%

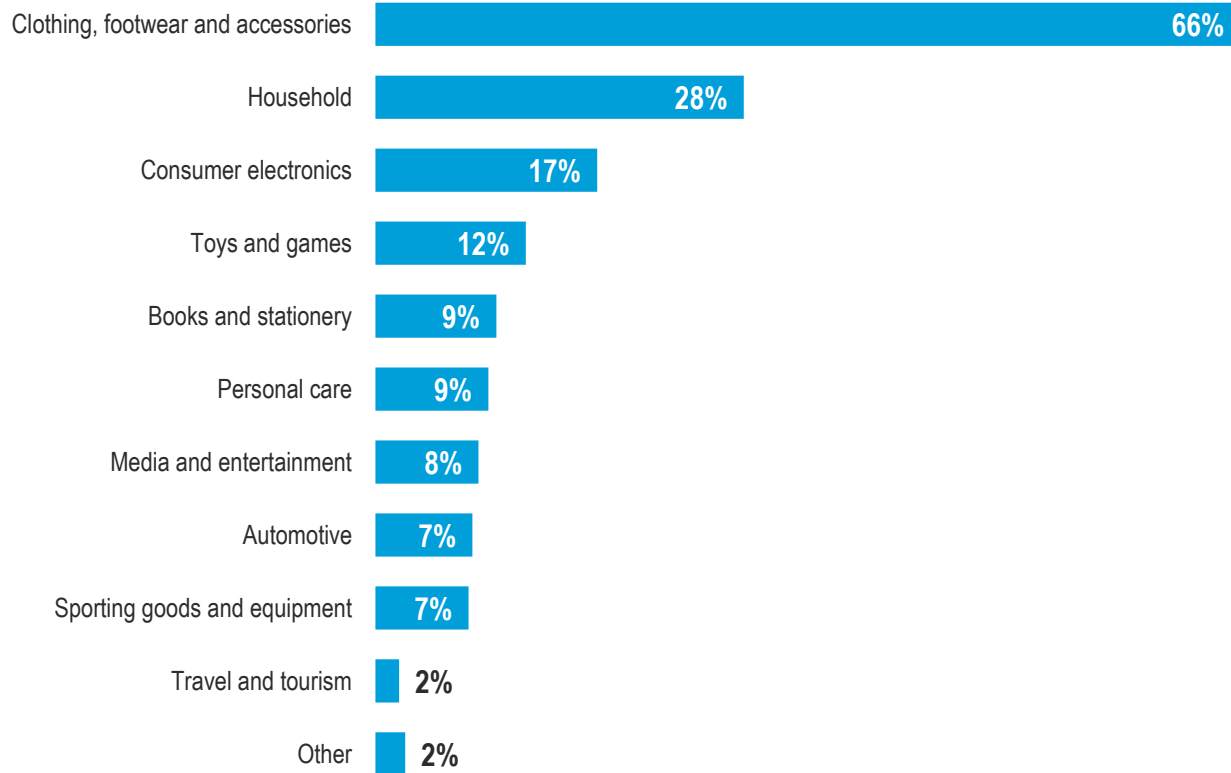
THINKING ABOUT THE PRODUCTS YOU PURCHASED ONLINE IN THE LAST THREE MONTHS, WHAT IS THE DELIVERY/ COLLECTION METHOD YOU MOST FREQUENTLY USED FOR EACH TYPE OF PRODUCT?

Note: Online shopper sample size = 738; This was a multiple response question as such percentages do not add up to 100%



TWO THIRDS OF SHOPPERS HAVE RETURNED A **PHYSICAL STORE** PURCHASE

PRODUCT CATEGORIES RETURNED



HAVE YOU EVER RETURNED A PURCHASE YOU MADE IN A PHYSICAL STORE?

WHAT TYPES OF PRODUCTS HAVE YOU RETURNED?

*Sample size = 1005; Physical store return sample size = 659;
This is a multiple response question, as such percentages do not add to 100%*

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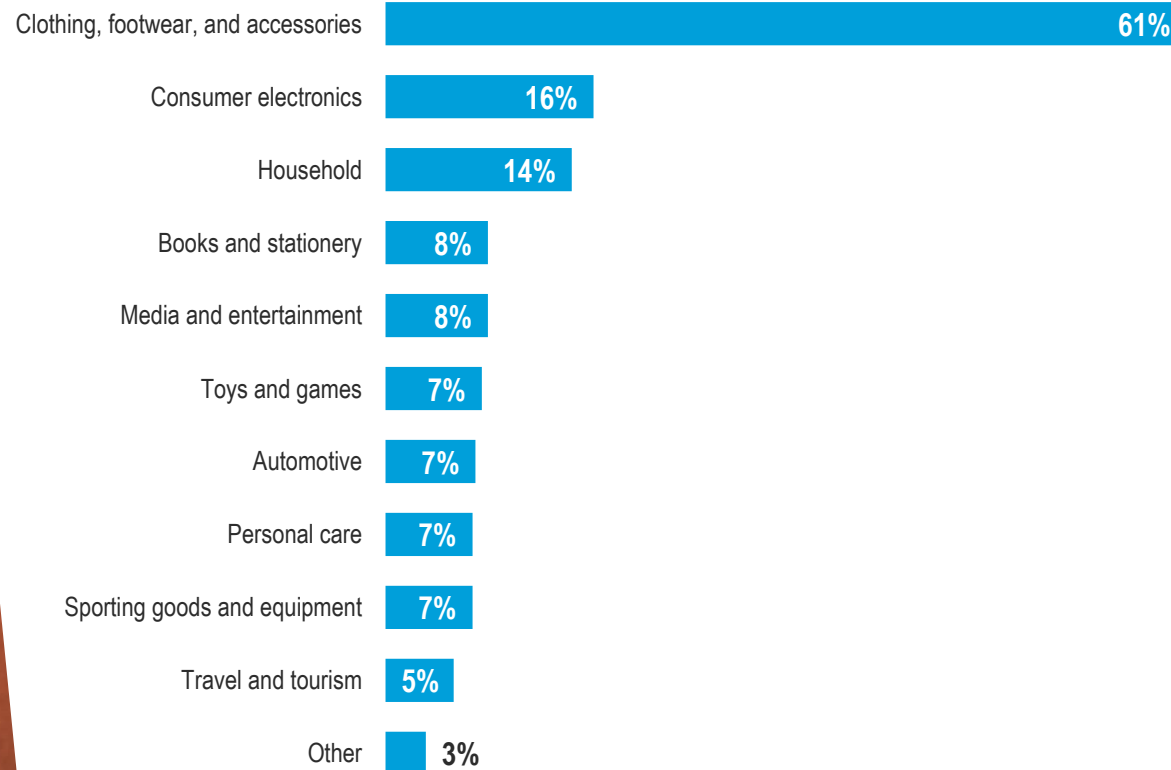


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42%

A LOWER PROPORTION OF SHOPPERS HAVE RETURNED **ONLINE** PURCHASES COMPARED TO PHYSICAL STORES



HAVE YOU EVER RETURNED A PURCHASE YOU MADE ONLINE?

WHAT TYPES OF PRODUCTS HAVE YOU RETURNED?

*Sample size = 1005; Online return sample size = 420;
This is a multiple response question, as such percentages do not add to 100%*

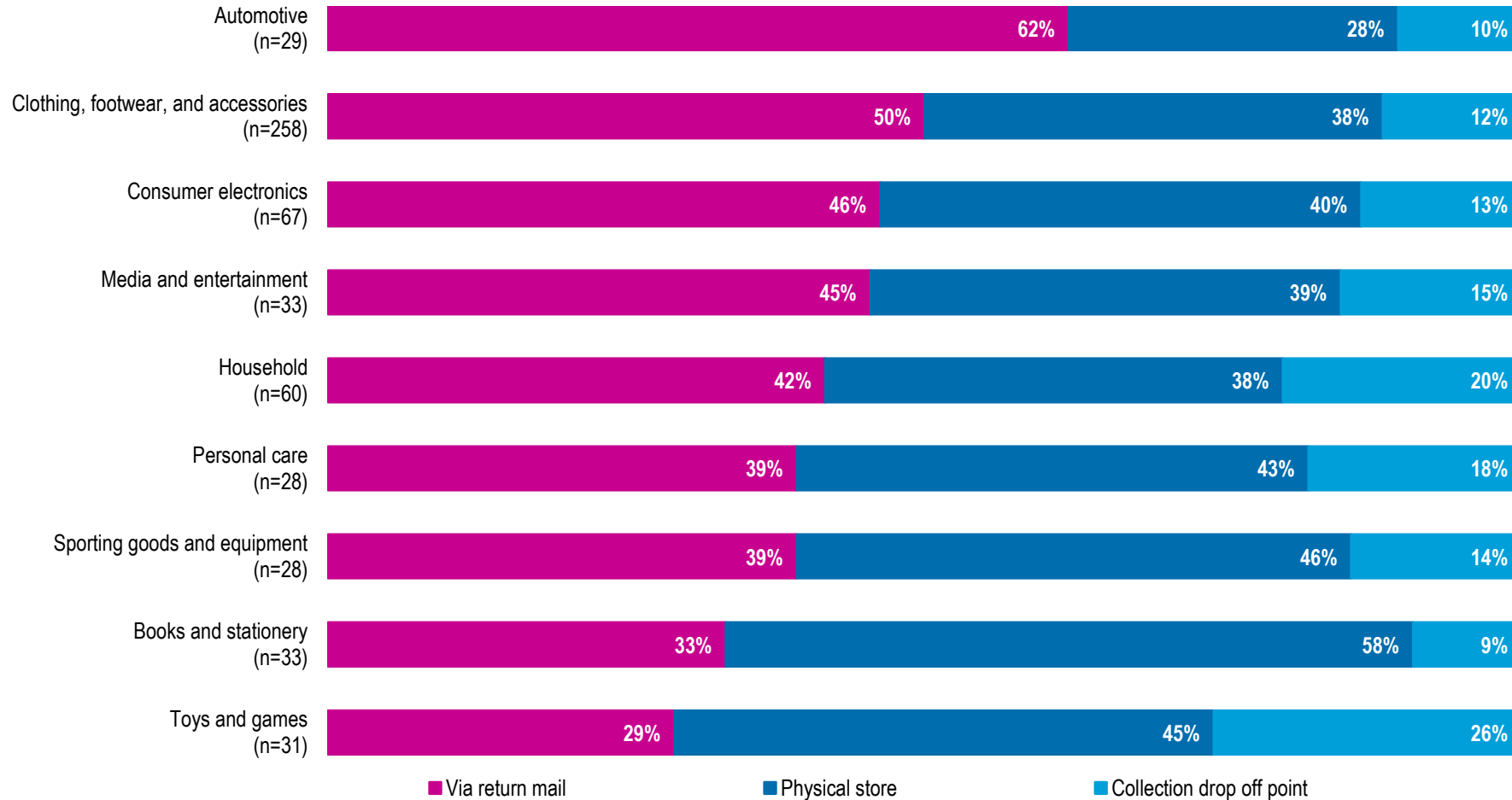
THE MOST COMMON REASON FOR RETURNING ONLINE PURCHASES WAS BECAUSE OF DAMAGES OR DEFECTS

REASONS FOR RETURN	CHANGE OF MIND	DID NOT FIT	DID NOT MATCH DESCRIPTION	DAMAGED OR DEFECTIVE	PURCHASED MULTIPLE SIZES	WRONG PRODUCT DELIVERED
Clothing, footwear and accessories (n=258)	10%	51%	18%	11%	7%	3%
Consumer electronics (n=67)	3%	11%	18%	47%	11%	7%
Household (n=60)	11%	10%	25%	33%	10%	10%
Books and stationery (n=33)	15%	9%	19%	32%	15%	9%
Media and entertainment (n=33)	13%	15%	21%	30%	13%	9%
Toys and games (n=31)	24%	7%	12%	39%	7%	7%
Automotive (n=29)	13%	20%	29%	20%	2%	16%
Personal care (n=28)	8%	14%	22%	36%	11%	8%
Sporting goods and equipment (n=28)	10%	23%	8%	40%	15%	5%
Travel and tourism (n=22)	9%	N/A	27%	N/A	N/A	N/A

WHICH OF THE FOLLOWING REASONS BEST EXPLAINS WHY YOU RETURNED YOUR ONLINE PURCHASE?

Note: Online return sample size = 420; This was a multiple choice question as such percentages do not add up to 100%

SHOPPERS WERE SEEKING FLEXIBILITY ON HOW THEY RETURN ONLINE PURCHASES



HOW DO YOU MOST PREFER TO RETURN A PRODUCT PURCHASE YOU MADE ONLINE?
NOTE, THIS QUESTION ONLY APPLIES TO PHYSICAL PRODUCTS

Note: Online return sample size = 420; Percentages may not add up to 100% due to rounding

Australian Consumer and Retail Studies

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