

**J.C. WILLIAMS GROUP****J.C. WILLIAMS GROUP**

of the &gt; NATIONAL RETAIL FEDERATION

**The Multi-Channel  
Retail Report**

Conducted by:

**J.C. WILLIAMS GROUP**

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# Multi-Channel Retail Report 2001

**22 Multi-Channel Retailers**  
Department, Apparel, Home & Leisure Specialty Stores



**Store Customers**  
1,918 Exit  
Interviews

**Catalog Customers**  
700 Phone Surveys

**Online Customers**  
Internet Surveys  
(45,000+ POS &  
4,000+ Fulfillment)

**Retail Executives**  
44 One-to-one Interviews

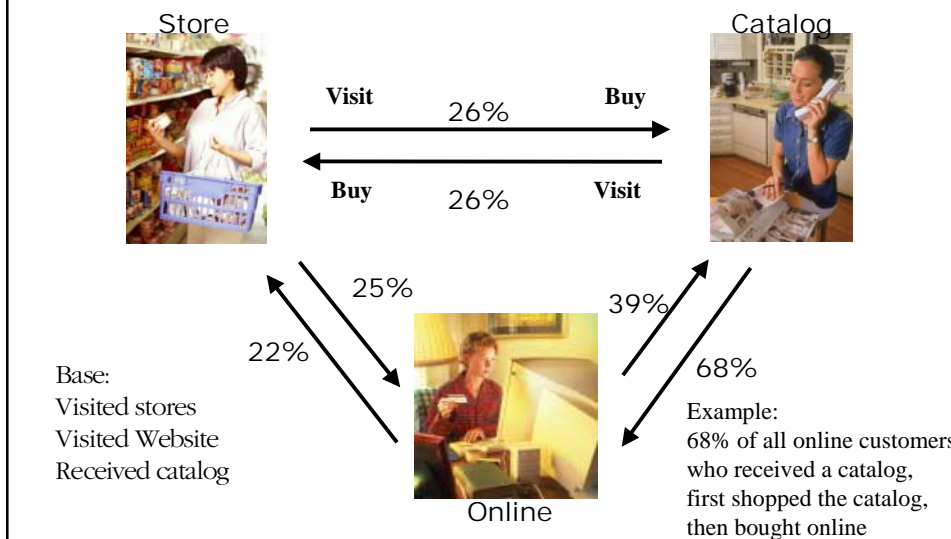
## Cross-Channel Behavior

## Online Shoppers: Many Are Cross-Channel Buyers

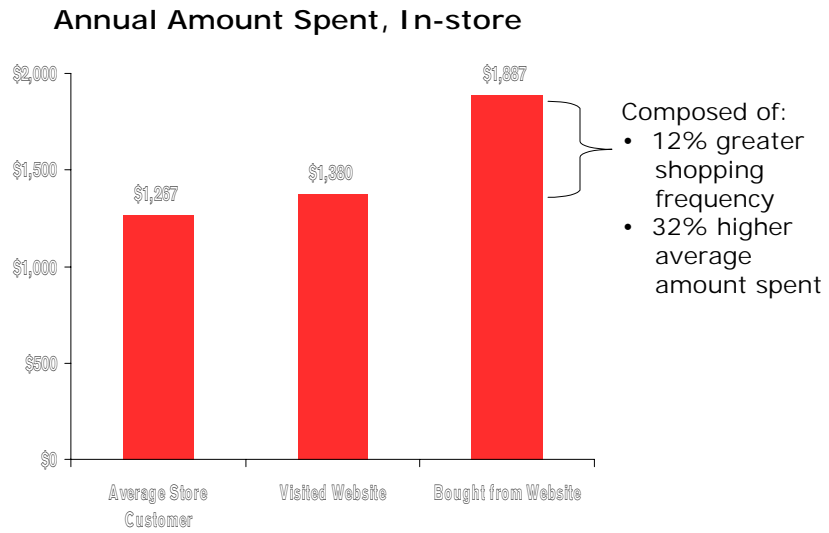


## Cross-Channel Influence is Significant

(% of customers that looked for or purchased something previously seen in another channel)



## Multi-Channel Shoppers: Most Valuable Customers



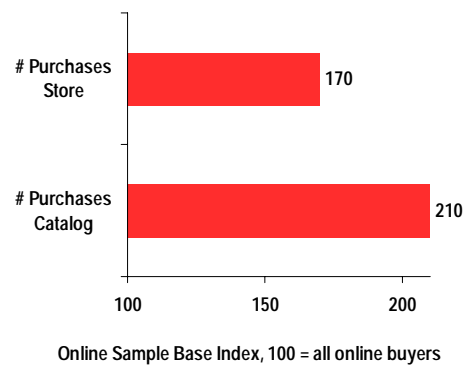
## Key Segments

## Super Customers

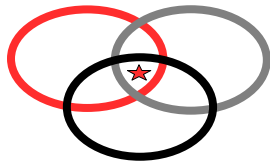
### Super Online Customers:

- Buy once/month or more from retailer's online channel
- Are 6% of all online customers
- Spend 21% more \$ per purchase
- Purchase four times as frequent

### Super Multi-Channel Customers Too!!



## Mid Market, Not Affluent



### Tri-Channel Shoppers



Highest Incidence in Apparel and Electronics Categories

Female

Young  
(45% are 18–34 years of age)

Some College Education

Middle Income  
\$30k–\$75k

## Summary and Implications

- Multi-channel shopping behavior has become mainstream; yet retailer excellence remains elusive
- Women and young adults are multi-channel shoppers
- The role of the catalog has never been more important
- Segmentation capabilities will be critical
- Retail category consolidation will accelerate due to multi-channel strategies
- Geographic reach of direct channels



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