

Click and Collect Will Surge This Holiday Season

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eMarketer Editors

If Amazon is poised to gain share in the first half of the final week before Christmas, click-and-collect orders will tip the scales in the direction of big-box merchants during the second half of that week.

According to Adobe, click-and-collect orders grew 50% during the 2018 holiday season, underscoring the synergistic effect of growing consumer demand and improved operational execution by retailers. Moreover, the desire for package security amid the rise of holiday “porch piracy” and the premium on immediacy as Christmas approaches, compel many shoppers to opt for click and collect specifically during the holidays.

Why Are US Internet Users Choosing Buy Online, Pick Up In-Store?

% of respondents, Nov 2018



Note: ages 18+; among those who use BOPUS

Source: National Retail Federation (NRF) with Toluna Analytics, "2018/2019 Winter Consumer View," Jan 15, 2019

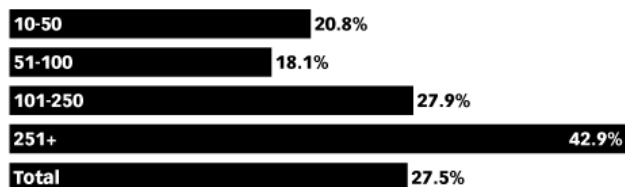
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September 2019 research from Field Agent indicated that 51% of online shoppers consider themselves very likely or completely likely to use click and collect this season, which particularly advantages big-box retailers like Walmart, Target, Best Buy and Kohl's that have advanced click-and-collect operations. Q4 2018 data from OrderDynamics indicated that retailers with at least 251 locations were most likely to have click and collect (42.9%), while those with at least 100 locations were about half as likely to have it. Shoppers are more likely to have already used click and collect at these stores and value the convenience of this option.

Buy Online, Pickup In-Store Adoption Rate Among US Retail Sites, by Number of Stores, Nov 2018

among retail websites analyzed by OrderDynamics



Note: represents activity analyzed by OrderDynamics, broader industry metrics may vary

Source: OrderDynamics, "Omni-2000 Research: US," Nov 28, 2018

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Leading big-box retailers tout in-store pickup as a service valued by customers that's driving ecommerce growth. In Target's Q2 2019

earnings announcement—which saw the company beat on the top line, bottom line and raise guidance—CEO Brian Cornell called out click-and-collect as a key source of the company’s momentum. “In our digital channels, we continue to see the most rapid growth in our same-day fulfillment options, in-store pickup, Drive Up and Shipt, which together have more than doubled their sales in the last year,” he said. “These options offer speed, convenience and reliability, and as a result, they are quickly becoming the preferred fulfillment choices for our guests.”

Rakuten Intelligence data from the 2018 holiday season underscores how this effect manifests in the lead-up to Christmas. Between December 17 and 20, Walmart, Target, Best Buy and Kohl’s had a combined daily market share of 9.2% to 9.5% during those days. During each of the next four days leading up to Christmas, their combined share reached double digits, peaking at 13.2% on December 23.

With the likelihood that unfulfilled gift purchases linger closer to the Christmas deadline, these late-season market share gains should become even more concentrated to wrap up the 2019 online holiday shopping season.

For more on the 2019 holiday shopping season, including our forecast for total retail, ecommerce and mcommerce spending, eMarketer PRO subscribers can read our full report [here](#).

Report by Andrew Lipsman Oct 28, 2019

Holiday Shopping 2019

HOLIDAY SHOPPING 2019

Mixed Results Expected
Amid Tight Calendar and
Economic Uncertainty

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Andrew Lipsman
Contributors: Chris Cio, David Davis, Amy Roberts, Peter Sells, Brian Burrows, David Hy



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