

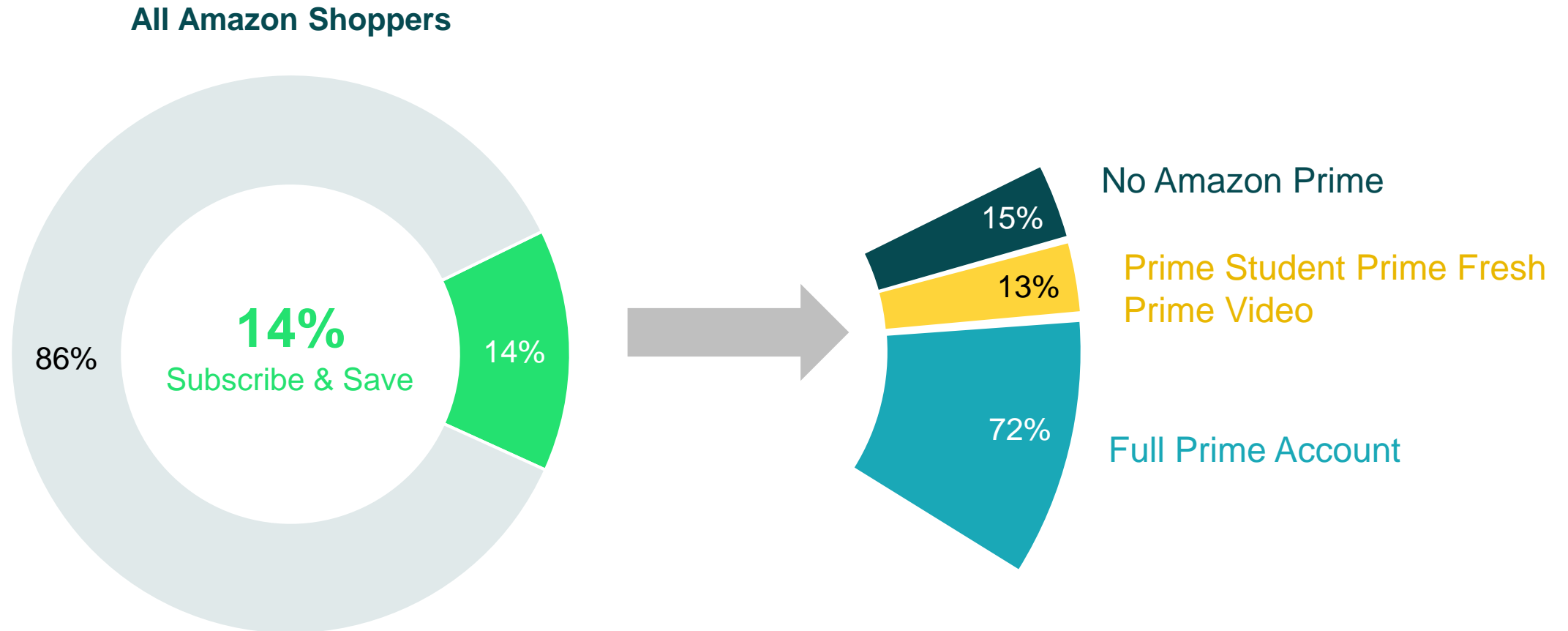


# Numerator

NEW FRONTIERS

## Subscribe and Save

# 14% of Amazon Shoppers Use Subscribe & Save



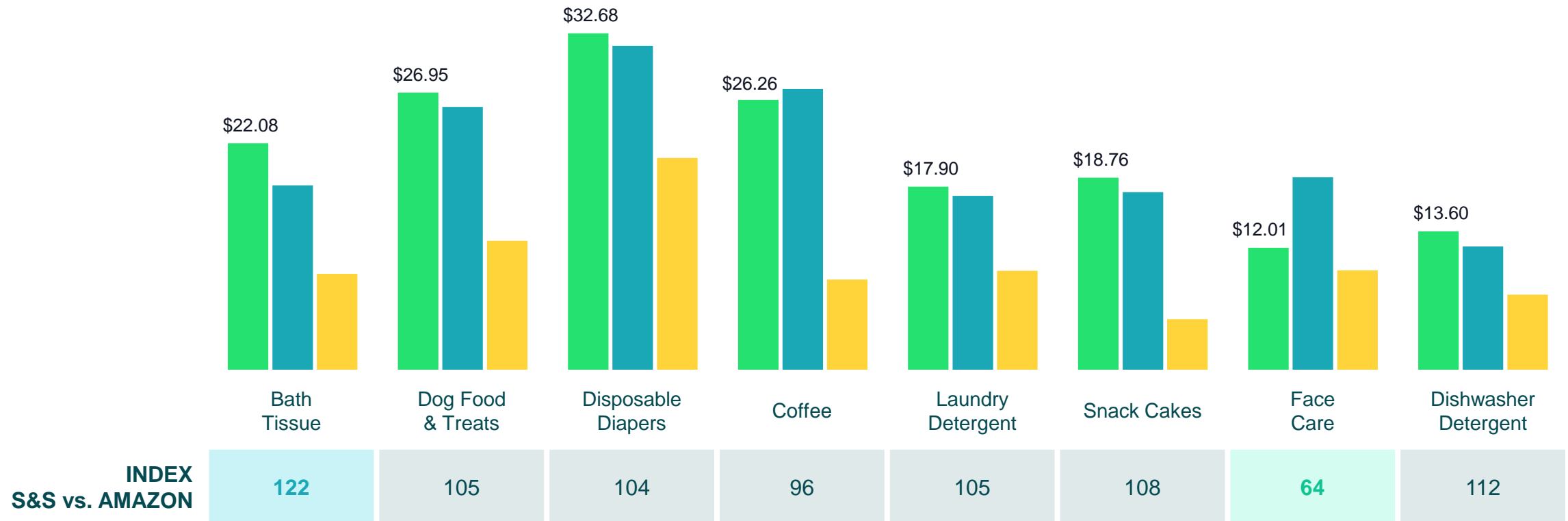
How do shoppers purchase  
on Subscribe & Save?

# Subscribe & Save Usually Leads to Higher Spend per Trip

## Top Categories by Item Dollars per Trip

Subscribe & Save vs. Amazon (excl. S&S) vs. FMCG + Specialty, Last 52 Weeks

■ Subscribe & Save ■ Amazon ■ FMCG + Specialty

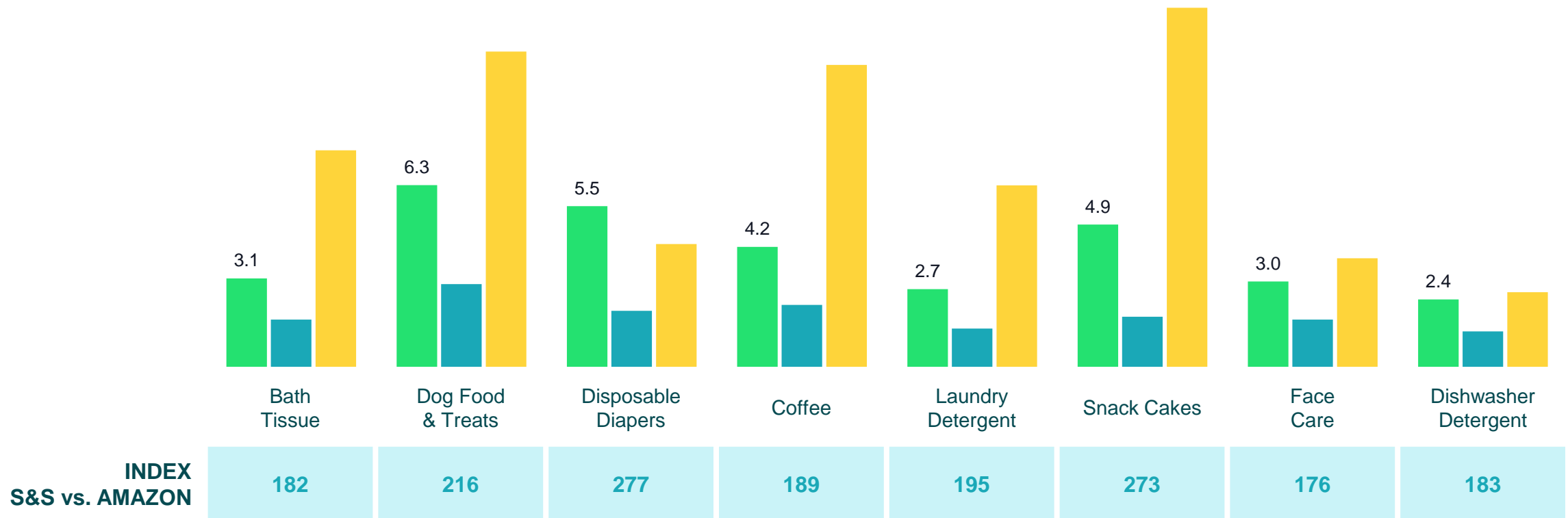


# S&S Shoppers Buy More Often than Average Amazon Shoppers

## Top Categories by Trip Frequency

Subscribe & Save vs. Amazon (excl. S&S) vs. FMCG + Specialty, Last 52 Weeks

■ Subscribe & Save ■ Amazon ■ FMCG + Specialty



# The Most Valuable Shoppers in a Category Use Subscribe & Save

## Top Categories by Buy Rate

Subscribe & Save vs. Amazon (excl. S&S) vs. FMCG + Specialty, Last 52 Weeks

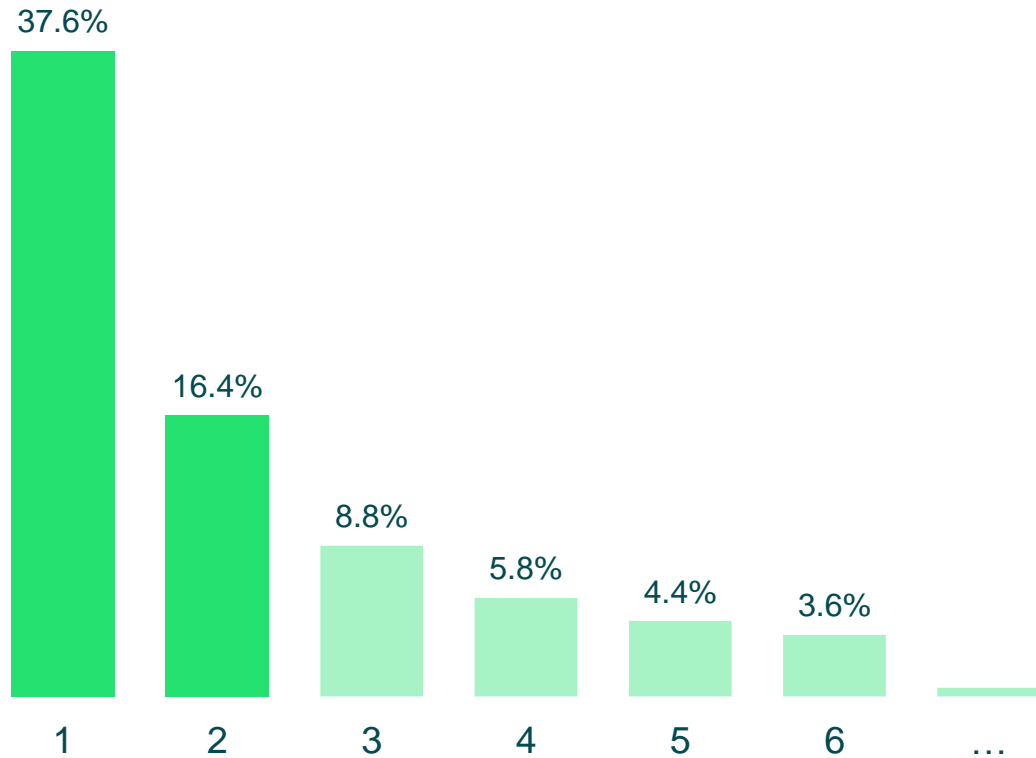
■ Subscribe & Save ■ Amazon ■ FMCG + Specialty



# Shoppers Are Brand Loyal When Using Subscribe & Save

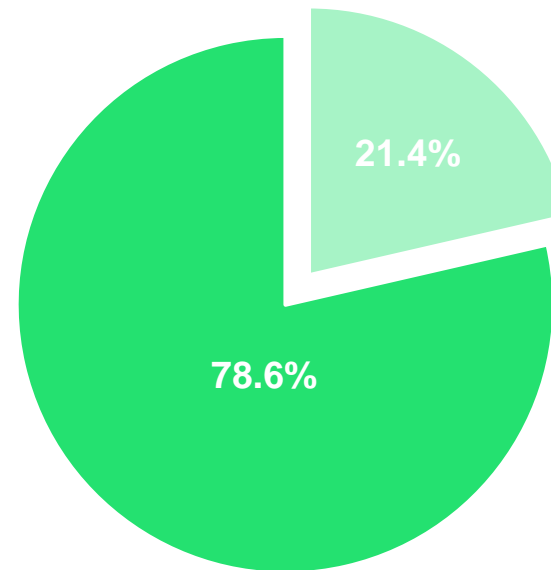
## Number of Categories Subscribed-To

% of Households, Last 52 Weeks



## Number of Brands Subscribed-To

% of Households, Last 52 Weeks



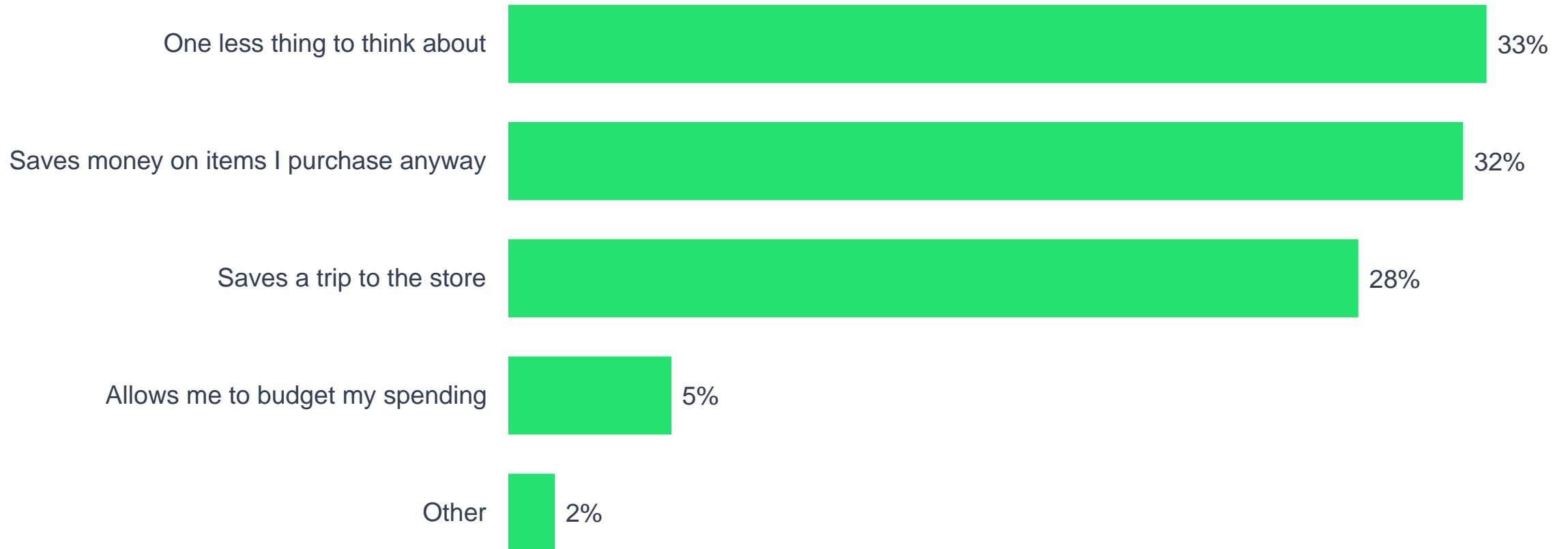
What are the drivers and barriers  
for Subscribe & Save Shoppers?



# Shoppers Use Subscribe & Save for Convenience

## What is the biggest advantage of using Amazon Subscribe & Save?

% of Shoppers Responding



# What Do You Like About The Subscribe & Save Experience?

## CONVENIENCE

- ““ It's simple and you don't have to remember to continually buy the product.
- ““ I don't have to worry about going to the store each month to pick up items. I can set up auto order and it gets sent on my schedule.
- ““ You don't have to remember to order before you run out, it just magically appears.
- ““ Trips to the grocery store are shorter with buying staple house hold items online that are delivered.

## PRICE

- ““ You can usually get the item cheaper than the store as long as you don't need it right away.
- ““ It's fast and easy. I save an additional 5% on my items by using this service and I don't have to remember to purchase the items again.
- ““ Things are a good price and like having it delivered to the house, very convenient and price is better then getting in car and driving and picking it up

# What Do You Dislike About Amazon Subscribe & Save?

## PRICE FLUCTUATION

- ““ I don't like how the prices fluctuate.
- ““ That the prices change that you have to pay attention to it or the price may go up on an item and you won't know until it's actually time to ship it to you so I have to check it as soon as they notify my shipment is being prepared so that I don't overpay.
- ““ Some prices are higher than in-store. Can't use coupons. Some items not available to subscribe to. Items I subscribe to are sometimes out of stock on next delivery date.

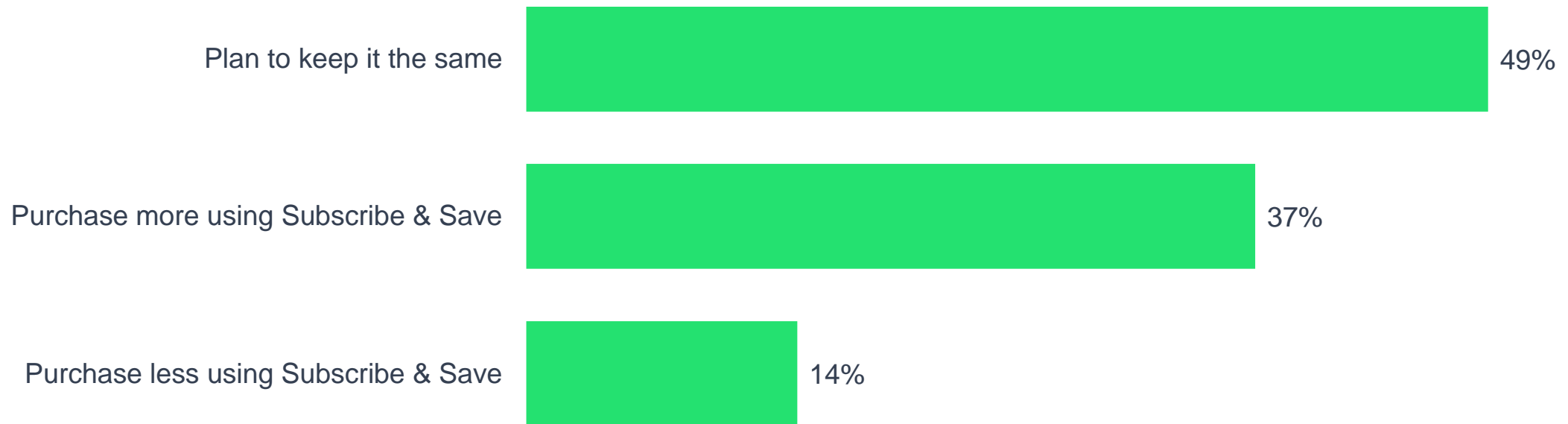
## NOT ENOUGH FLEXIBILITY

- ““ You might forget about it and not need the item anymore.
- ““ Having too many or not enough diapers if my kids use more than normal or less than normal.
- ““ I need more choices of time intervals for delivery. For example; Pet Food, my pets don't eat all the food I ordered in the time interval. I have to cancel orders.

# S&S is Growing: Shoppers Plan to Keep it, or Use it More

## How will you change usage of Subscribe & Save over the next year?

% of Shoppers Responding





# Numerator

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hello@numerator.com**