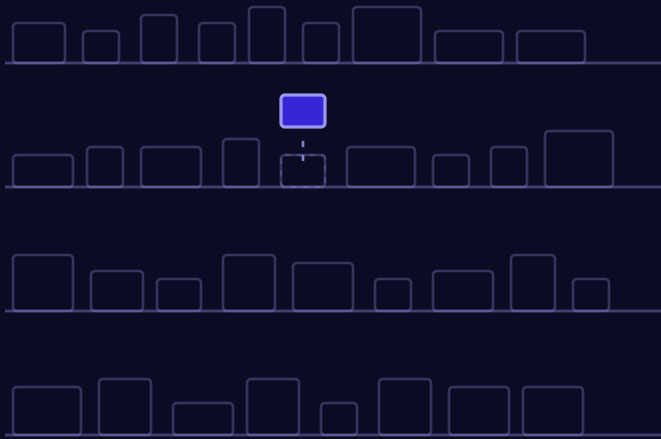


How Walmart shoppers decide

Forty-three shoppers walked us through one real Walmart trip, moment by moment. Most of them hit something that went wrong, and almost all of them are coming back anyway.



43

shoppers, each on one recent Walmart trip

7.6

hours of interview, 38,600 words of shopper speech

34

hit at least one obstacle on the trip

36

will shop there again regardless

Six budget lines.

Which one **wins the basket**?

Shopper research only earns its keep if it says which lever to move. So we reconstructed real trips end to end and asked where the basket is actually won or lost, and who owns the fix.

Labor

Floor staff, department cover, checkout lanes, and the hours they sit in.

Fixtures

Locked cases, end caps, shelf layout, aisle width and adjacency.

Signage

Aisle markers, category wayfinding, shelf labels and unit pricing.

App and web

Aisle lookup, stock accuracy, list building, pickup and delivery.

Assortment

What is carried, in which pack sizes, and whether it is on the shelf.

Price and promotion

Everyday price, rollbacks, clearance and the coupon ecosystem.

The answer in advance: the basket was never won by persuasion in these 43 trips. Price and proximity won it before the shopper left home. Everything that happened in the store could only lose it, and in 34 of 43 trips something tried.

What was done, and **what it can carry**

The method

- **Adaptive voice interviews.** Every probe and ladder chosen turn by turn by the AI moderator, not scripted.
- **One trip, in sequence.** Each shopper reconstructs a single real purchase from trigger through checkout.
- **Coded twice, blind.** Two independent passes over every transcript. They agreed on 42 of 43 base members and on 36 versus 35 for return intent.
- **Quality-gated.** Only interviews clearing the depth bar enter the base, and only those are billed.

The base

- **43 Walmart shoppers.** Channel was coded for 41 of them: 38 bought in store, 3 online.
- **Groceries 14, electronics 7, personal care 6,** then household, kids, apparel, gift and pharmacy.
- **Triggers:** ran out 21, a new need 7, an event 6, a replacement 3, impulse 2, a recommendation 2.
- **Counts of three or fewer are directional** and are flagged as hypotheses here, never as findings.

Base and limitations. 43 shoppers recruited nationally, each interviewed about one recent Walmart trip between 24 July and 8 September 2026. Shoppers were recruited on a recent-purchase basis rather than screened to a Walmart quota, so the base reflects who chose Walmart rather than a designed cross-section of the shopper file. Every shopper here completed a purchase, so trips abandoned before the till sit outside this base. Findings describe these 43 shoppers and are not projected to the chain.

This is not loyalty. It is **tolerance**, and it is priced

Shoppers arrive decided, absorb whatever the store puts in their way, and come back because it is close and cheap. Nothing else is holding them.

01

They arrive decided

34 of 43 came with a list, usually in their head. 23 of 41 walked straight to the item. The store is not competing for the choice.

02

They come for the door

Proximity was the reason in 14 of 41, price in 9, habit in 7. Location and price bring them. Nothing inside does.

03

Then they absorb friction

34 of 43 hit an obstacle. For 17 of 43 nobody resolved it. The shelf alone carried 20 of the 51 friction moments.

04

And return anyway

36 of 43 will be back, and 10 of 41 could not name a single moment that stood out. Tolerance reads as loyalty in a tracker.

Why that should worry an operator: tolerance is contingent. It holds exactly as long as the store is the closest and cheapest option, and it transfers the day something nearer or cheaper opens. Friction is not currently costing trips. It is costing the reason to stay.

Where the basket is won and lost

The item is chosen before arrival. The trip is decided at the shelf, which is also where most of what goes wrong happens.

STAGE 1  Trigger Ran out, an event, or something broke. Half of all trips begin as a routine top-up.	STAGE 2  Plan at home A mental list for 28, a written or app list for 6. The item and often the price are now settled.	STAGE 3  Arrive Parking, a cart, and the first read of how busy the store is that day.	STAGE 4  Find it Straight to a known aisle in most trips. When that fails the shopper hunts alone before asking.	STAGE 5  At the shelf Compare packs and unit price, weigh varieties, or find the item is simply not there.	STAGE 6  Checkout Self-checkout by default. The last impression of the trip, and usually an unstaffed one.	STAGE 7  After Carrying it out, a delivery window, or a second stop for the thing they forgot.
 1	none	 3	 12	 20	 5	 6

 shaded stages are the ones the store controls  bar and number show friction moments coded at that stage, 51 in total

Decided at the shelf · 19 of 43

The moment that shaped the trip was a pack-size comparison, a rollback, an empty peg or a variety they could not choose between.

Decided by a person · 7 of 43

An employee who unlocked something, found something, or was not there. The smallest controllable surface, and the most variable.

No decisive moment · 7 of 43

Nothing in the trip shaped anything. For a top-up store that is a success, and it is also the memory problem on page 12.

Read it this way: stages 1 and 2 decide the purchase and the store is absent from both. Of the five stages it does own, one carries 39% of everything that went wrong. The shelf is not a display problem, it is the decision surface.

A top-up store, not a big-shop store

35 of 43 CAME FOR ONE ITEM OR A FEW · ONLY 4 WERE A FULL STOCK-UP

This base does not describe the weekly shop. It describes short, targeted trips by people who already know the aisle, which sets the clock the whole visit is judged against.



What a top-up trip means for the store

- **In-store persuasion has no surface.** The planned item is already chosen, so the building cannot reopen a decision made at home.
- **The only mid-decision touchpoint is digital.** Aisle location, live stock and list building in the app reach the shopper at stage 2.
- **The trip is judged on elapsed time,** not on selection. Every minute added is measured against someone who expected to be out in ten.

IN THEIR WORDS

“I usually stop at this Walmart at least 3 or 4 times a week, so I know exactly where they are in the store.”

Shopper W05 · skincare, routine top-up

“So I compared prices between Walmart, Target, Amazon, eBay, and the best reasonable price and closest distance was Walmart.”

Shopper W07 · memory card, comparison finished before leaving

What this sets: a short trip is judged on elapsed time, not on selection. Every minute the store adds is measured against a shopper who expected to be out in ten.

They hunt alone before they ask

12 friction moments

CODED AT THE NAVIGATION STAGE · 20 OF 41 PREFERRED NO STAFF CONTACT AT ALL

Being lost does not send a shopper to an employee. It sends them searching. Every wayfinding gap is therefore paid for twice, once in the shopper's time and again in staff time when they finally give in.



Why signage beats staffing here

- **Shoppers hunt before they ask.** Being lost sends them searching, not to an employee, so a gap is paid twice: their patience, then staff time.
- **Adding people does not fix it.** A shopper who will not ask cannot be helped by more floor cover. A sign or a phone screen can.
- **Resets are the risk window.** Moving a category strands the shoppers who navigate from memory, which is most of them.

IN THEIR WORDS

“I preferred figuring it out by myself if I needed help you know, and I couldn't find it on my own, then I would ask for help.”

Shopper W37 · the default sequence, stated outright

“We couldn't find the Roku at first. We thought we were gonna have to ask somebody, but then we found where the device were located.”

Shopper W02 · resolved by persistence, not by help

“it was a little bit difficult because there was some remodeling going on in the store.”

Shopper W37 · a reset moved the coffee aisle

The compounding cost: a shopper who hunts for five minutes and then asks anyway has spent their own patience and an employee's time. Signage is the only fix that spends neither.

The shelf is **the whole game**

20 of 51 FRICTION MOMENTS HAPPENED HERE · AND 19 OF 43 NAMED THE SHELF AS THE MOMENT THAT SHAPED THE TRIP

Three different failures share one surface. The item is absent, the choice is overwhelming, or the promotion is on the wrong size. None of them are price problems and all of them are fixable.



Three failures, one surface

- **The item is absent.** 6 of 43 arrived to find what they came for was not on the shelf.
- **The choice is overwhelming.** 5 of 43 described the range itself as the obstacle, not the price.
- **The promotion is on the wrong pack.** Deals landing on sizes shoppers do not buy read as a broken price promise.
- **This is the only stage the store still owns.** Assortment depth without decision support turns a strength into a stall.

IN THEIR WORDS

“there we are many varieties that it was hard to choose between which 1 or which 1 should I go with”

Shopper W24 · toothpaste, on choosing

“the bag was already out of stock. And then I felt so bad.”

Shopper W22 · school backpack

“the size that I didn't need was half off. And I did not like that”

Shopper W14 · training pants

What we are not saying: none of this is an argument for less choice. It is an argument for choice that arrives with a way to navigate it.

Shoppers are **defending** against the basket

11 of 43 RAISED UNPLANNED BUYING UNPROMPTED · SEVERAL AS SOMETHING THEY ACTIVELY RESIST

Mission-mode navigation is not only efficiency, it is a deliberate defence. Shoppers described going straight to a section in order to avoid buying more. The add-on still happens, but only once the mission item is safe.



The basket is being defended against

- **Mission navigation is a defence.** Shoppers described going straight to a section specifically to avoid buying more.
- **The add-on still lands,** but only once the mission item is safely in the cart and the guard comes down.
- **Placement is the variable, not price.** A display on the inbound path meets resistance; the same display on the way to the tills does not.

IN THEIR WORDS

“I had hoped to not have any impulse buys that day, but I never get out without an impulse buy.”

Shopper W26 · weekly staples and a prescription

“So avoid impulse buying, you know, just went straight to the grocery section.”

Shopper W44 · the defence, stated outright

“I just wanted diapers, but I ended up getting wipes I ended up getting baby wipes because they were on sale.”

Shopper W32 · the add came after the mission item

Testable next: the same end cap on the inbound path and on the return path, measured on conversion. This base says the second placement meets a different shopper.

The last impression is **unstaffed**

14 of 41 HAD A POSITIVE STAFF INTERACTION ANYWHERE IN THE WHOLE TRIP

Self-checkout is the assumed route. For several shoppers the only human contact of the visit was someone pointing them at a free station, which leaves queue length as the store's closing argument.



Queue length is the closing argument

- **Self-checkout is the assumed route.** For several shoppers the only human contact of the whole visit was being pointed at a free station.
- **Staff barely register elsewhere,** but their absence at the till is the last thing that happens on the trip.
- **This is a scheduling question, not a headcount one.** Lanes staffed to the hours these shoppers describe, not to a daily average.

IN THEIR WORDS

“It was all on my own. The only person we spoke to was someone at the self checkout directing us to an open station.”

Shopper W40 · the entire human experience of the trip

“If I could change 1 thing about that trip, I would say if the store wasn't as busy so the lines weren't as long and I could get out faster.”

Shopper W10 · the single change requested

“Me getting to not standing in long queue. Is what really matters to me.”

Shopper W29 · gift card, in and out

The asymmetry: staff presence barely registers anywhere else in the trip, but its absence at the till is the last thing that happens. That is a scheduling question, not a headcount one.

Everything that went wrong, and who owns it

34 of 43 shoppers hit at least one obstacle. Ranked by what it costs and who can fix it, not by how often it came up.

Friction	n	Stage	What it costs	Owner	The fix this points to
Too much choice, no decision aid	5	Shelf	Time, then over-buying or a stall	Assortment and labels	Unit pricing and good-better-best cues where variety is deepest
Item not on the shelf	6	Shelf	Substitution or a lost line	Replenishment	Shelf-level stock accuracy in the app, with a suggested substitute
Store too crowded	6	Arrive	Trip shortened, basket cut	Store operations	Cart-width aisles at peak and honest busy-hours guidance in the app
Cannot find the item	5	Find it	Shopper time, then staff time	Signage and app	Aisle-level wayfinding, and a reset protocol that flags moved categories
Promotion on the wrong pack	4	Shelf	Trust in the price promise	Pricing	Promote the sizes shoppers actually buy, not the slow-moving ones
No one available to help	4	Staff	Waiting, occasionally a walkout	Labor scheduling	Cover in locked-case categories first, where absence is most expensive
Queue at checkout	2	Checkout	The closing impression	Labor scheduling	Lanes staffed to observed peak hours, not to a daily average

The shape of it: almost none of this is price. It is stock, layout, labels and cover. Four of the seven rows sit on one surface, the shelf, and three of them are fixed with information rather than with people.

Most friction was **never resolved**. It changed nothing

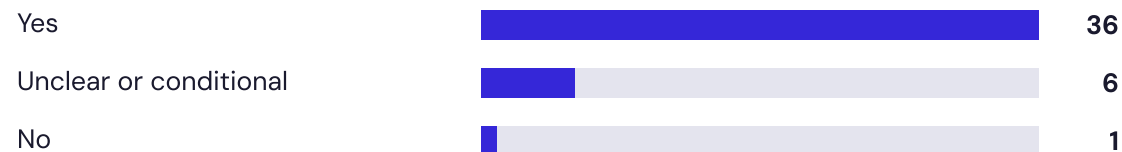
Of the 34 shoppers who hit an obstacle, 17 saw it resolved by nobody at all. They worked around it, or they went without, and then they said they would be back.

How the friction ended

One outcome per shopper, n = 43



And yet, would they return?



Why a healthy tracker is the wrong signal

- **What the instrument reports.** Return intent 84%, complaints few, satisfaction healthy. Nothing in it is wrong.
- **What it cannot see.** That 17 shoppers hit something nobody fixed, and that 10 of 41 could not name one memorable moment in the visit.
- **What that actually means.** Friction here is not costing trips. It is costing the reason to stay once the store is no longer closest and cheapest.

IN THEIR WORDS

“No. Nothing really stood out. It was pretty much straightforward, in and out. I already knew what store I was going to, what product I was getting, what aisle I was in.”

Shopper W07 · asked what stood out about the trip

The locked case may be costing baskets

2 of 43 RAISED LOCKED CASES UNPROMPTED · DIRECTIONAL ONLY, AND CARRIED HERE AS A QUESTION

Two mentions is not a pattern and we are not presenting it as one. It sits in the deck because the mechanism is specific, the severity is the entire basket, and one shopper says it has already cost trips that the store would never have seen.



Why this is here on two mentions

- **The mechanism is specific and the severity is the whole basket.** A shopper who abandons a locked case had already decided to buy.
- **It is invisible to the store.** Loss prevention protects the unit while the fixture forfeits the basket around it, and nothing records that.
- **Settle it before touching anything.** Exit intercepts at electronics plus a designed question next wave. The only abandonment we observed was a shopper without her payment card.
- **Two mentions earns a test, never a rollout.** This page shows what a flagged hypothesis looks like instead of being quietly promoted to a finding.

IN THEIR WORDS

“There have been times where I walked out of this store empty handed because I had to wait for someone to come that never did.”

Shopper W23 · electronics, on locked cases

“I only had to ask for help because it was locked up in the aisle.”

Shopper W07 · the sole staff contact in an otherwise self-served trip

The standard being held here: two mentions earns a test, not a rollout. The only abandonment actually observed in this base was a payment problem, not a locked case.

Where we would move the money

Ranked by the weight of evidence behind them, not by size of prize. Two are carried by the base, one is a test.



01

Decision support at the shelf

The shelf carries 39% of all friction and the largest share of decisive moments. Depth of assortment is a strength that currently arrives without help: unit pricing, tiering cues, and promotions on the sizes people actually buy.

Evidence: 20 of 51 friction moments · 19 of 43 decisive moments · 5 choice overload, 6 out of stock, 4 promo mismatch



02

Wayfinding, especially after a reset

Shoppers hunt alone before asking, so a signage gap is paid twice. Aisle-level markers and in-app location are also the only tools that reach a shopper at stage 2, while the decision is still open.

Evidence: 12 of 51 friction moments at navigation · 20 of 41 preferred no staff contact



03

Test the locked case, do not act on it

Highest severity on the ledger and the thinnest evidence in the deck. Run the exit intercept before any fixture decision. Two mentions is a reason to look, never a reason to move.

Evidence: 2 of 43, directional. Carried as a hypothesis throughout

What we would not touch: price architecture and floor-staff headcount. Price brought these shoppers in and disappointed 4 of 43. Most of them actively prefer not to be approached, so adding people to the floor does not fix a signage problem.

The gap between this and a decision you can bank

What this base cannot tell you

- **Nobody who left empty-handed.** Every shopper here completed a purchase, so the walkout appears only in hindsight.
- **No store, format or region cut.** Findings cannot be routed to the operator who can act on them.
- **No quotas.** Trip types fell where they fell rather than being balanced and compared.

What we would field next

- **Add the lost trip.** A cell of shoppers who walked out or bought elsewhere. That is where the money is.
- **Quota the trip types.** Top-up, considered purchase and event shop behave like three different studies.
- **Cap recency at 14 days,** screen to their own shoppers, and cut by store format.

The one line to carry out of this deck: these shoppers were not persuaded by anything in the building. They arrived decided, absorbed whatever got in the way, and will keep coming until something closer or cheaper opens.