

# BOPIS for Groceries

Focusing on Customers'  
Expectations & Experiences



# BOPIS for Groceries

## INTRODUCTION

2020 has been marked by the global COVID-19 pandemic. Concern about the virus has led to a dramatic increase in shoppers buying online for pick up in-store or curbside (BOPIS). Grocery shopping, which is both necessary and a routine activity of daily life, has been particularly affected.

In order to better understand this phenomenon and support its clients, Bell and Howell, in partnership with Intel, commissioned research focused on grocery store BOPIS, contrasting expectations and experience.

## METHODOLOGY AT A GLANCE

Two surveys were conducted in the United States, one regarding **expectations** and one regarding **experience** with BOPIS. All respondents were required to have used BOPIS recently (for expectations, in past three months; for experience, in past month).

- Data collection occurred in July 2020
- 1,022 surveys with Expectations; 1,066 with Experience
- The survey was tailored around the BOPIS design in the grocery channel, featuring questions about in-store and curbside pick up.



## Table of Contents

3	Research Highlights
4	BOPIS Timing Overview
5	Rating Their Experience
6	Product Eligibility
7	Order Timing and Notification
8	In-Store Pickup Location
9	Inside the Store
10	Curbside Experience
13	Pickup Wait Time
14	Self-Service Pickup
15	Self-Service Technology
16	Tobacco/Alcohol Verification
17	Grocery Shopping Habits
18	Shopping Behaviors
20	Demographics

# Research Highlights



## People like BOPIS for groceries.

Shoppers are satisfied and will reuse the service, despite hiccups along the way. This creates an opportunity for retailers to build on an already solid platform of good will.



## The in-store experience needs to be easier.

Compared to curbside in-car service, those who went in-store are less satisfied. Plus, shoppers' experiences inside the store need to be improved. This should be a priority because a majority of shoppers use in-store BOPIS at least part of the time and many, especially younger shoppers, purchase additional items when going in to pick up their order.

*Focus on optimizing the in-store pickup area/kiosk, web/app instructions, and signage. And consider how to incorporate impulse items into the pickup area. In the meantime, be sure you provide sufficient employee support to help shoppers over the bumps. It's not always their first choice, but they appreciate it.*



## Focus on design.

Make sure signage is good, apps and websites are clear and easy to use, and that there is consistency across information sources. This will help meet the needs across users with different preferences.

*Just one example: when picking up curbside, GenZ/ Millennials relied on app/web instructions, while GenX/Boomers relied more on signs. Satisfy all ages by getting both approaches right!*



## Bottom line: BOPIS is here to stay.

BOPIS fills a need, especially during the pandemic and related safety requirements, and health authorities are consistent that this is not going to ease soon. In addition, consumer behavior shows that, once a convenience is introduced, people bond with it and don't want to go back. Retailers and their partners will be ahead if they can continue to improve delivery of this valuable service.

## Can anything be deprioritized?

The short answer is, not really. It'll really depend on the key audience, but to keep a diversified customer base, it's important to cover the bases. In terms of making the process easy and accessible, each tactic has its fans.

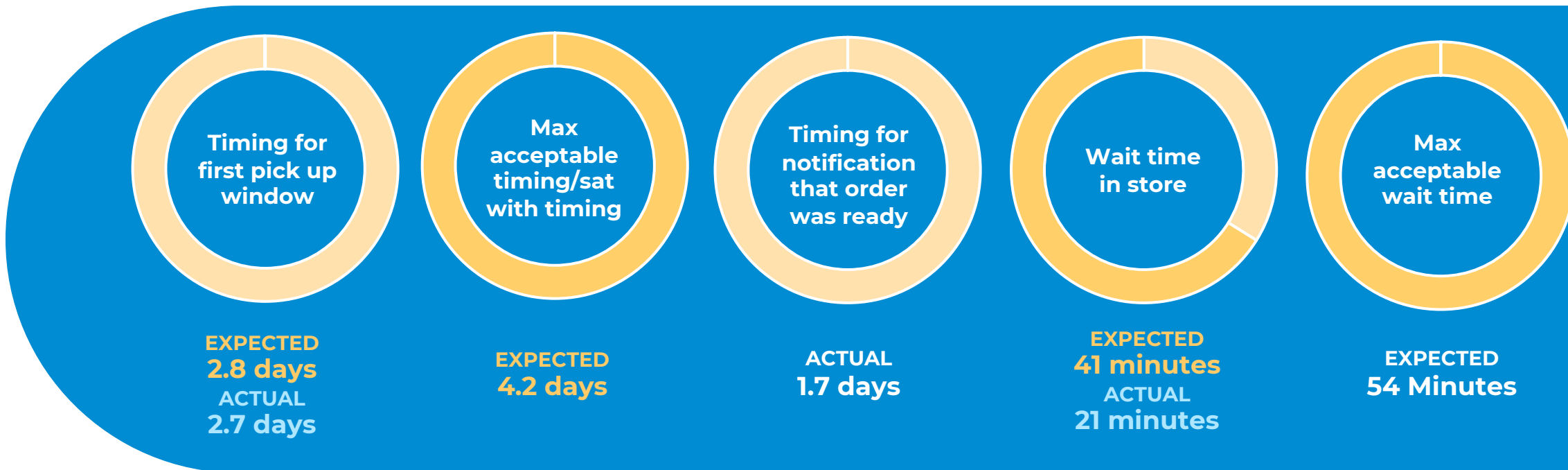
That said:

- There is much lower use of tablets, so focus less here when optimizing if necessary.
- There is less interest/use of app or phone for notification (but multiple methods builds in some communication insurance)

# BOPIS Timing Overview

## BOPIS timing performance is surprisingly positive compared to expectations

Wait time at the store shows the strongest difference between expected and actual time, with customers **getting their order twice as quickly** as expected. It may be that waiting 20 minutes would be too long in normal times, and that expectations are skewed by rocky rollouts of BOPIS processes early in the pandemic. Nonetheless, shoppers seem to have adjusted to the required timing. This contrasts to our hypothesis that actual times would be much longer than expected. Our current working hypothesis about expected vs. actual time is that expectations have been affected by the COVID-related influx of BOPIS for grocery. This is reflected throughout the upcoming pages.





# Rating Their Experience

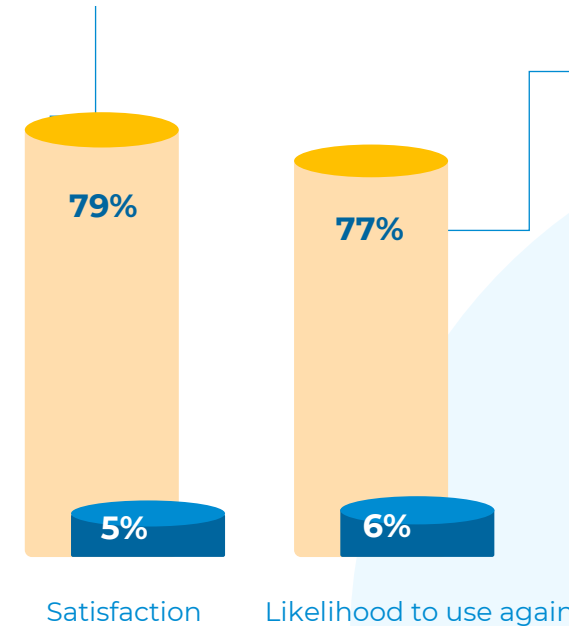
## Positive ratings are solid for BOPIS

Moreover, there are few negative ratings overall, and no clear strong pattern of dissatisfied BOPIS users based on age, sex, or other characteristics.

We also explored how using each order and pick up option affected satisfaction and likelihood to reuse the service.

- For in-store pickup, having to go to a location—any location—brought down the ratings. It may be that having to leave their car is an issue, a finding that is supported by ratings for curbside options that require leaving their car.
- The picture is more positive from there. In general, using specific BOPIS features, such as good signage or texting/calling to notify the store that they'd arrived led to higher ratings. This suggests that the approaches in place are going in the right direction, with opportunities remaining to enhance and delight.

Overall, **how satisfied** were you with your most recent experience buying groceries online for in the store pickup/curbside pickup?

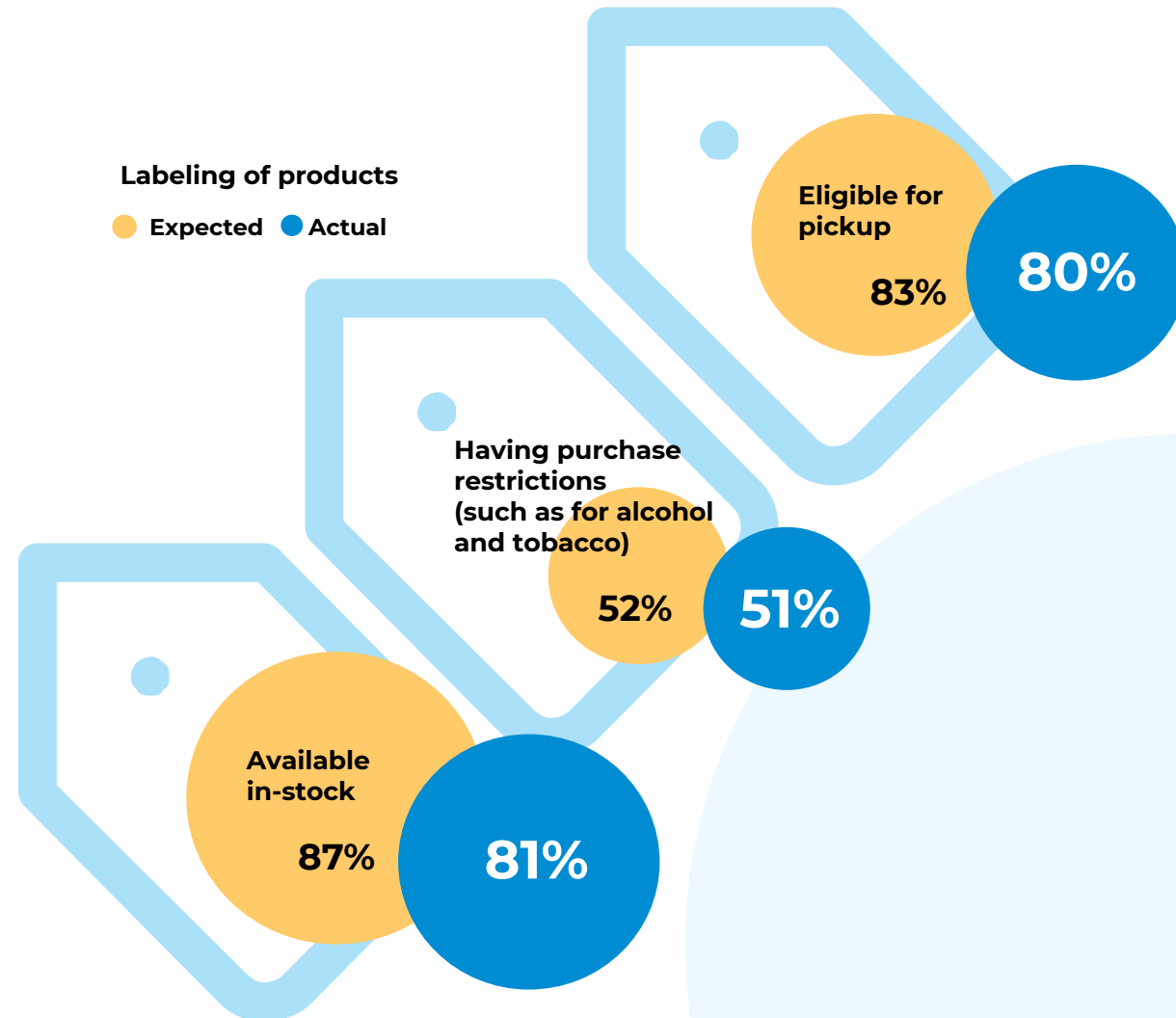


**How likely** are you to purchase groceries online for in the store pickup/curbside pickup from the same grocery store again in the future?

# Product Eligibility

**Retailers are communicating effectively about product availability and restrictions.**

But be careful about Boomers. Virtually all (95%) expect to know if items are in stock—but only 75% said this occurred when they placed their recent order. And note that expectations are higher among frequent shoppers, those who shop for groceries four times or more per month (roughly half of all shoppers, so it's important to keep them happy).



# Order Timing and Notification

**Text notification is most preferred—and that expectation is met.**

Customers also received notification through additional methods, and getting a notification generally leads to higher satisfaction and likelihood to reuse that retailers' BOPIS service. Timing between ordering and picking up is within expectations, which is good news from a customer experience point of view. This will bear watching, as their expectations may still be influenced by hiccups in early expansion of BOPIS during the pandemic. The bar may become higher as time goes on and this becomes the "new normal."

**Maximum wait  
expected for  
first pickup  
window**

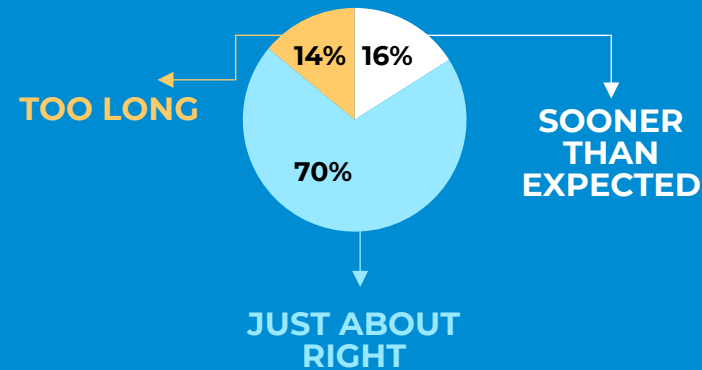
**4.2  
days**

Timing for first  
pick up window



**EXPECTED**  
2.8 days  
**ACTUAL**  
2.7 days

How customers felt about expected  
timing of first pickup window



How customers prefer to be/are notified  
that order is ready

	PREFERRED	ACTUAL
Text	53%	58%
Email	15%	39%
App	13%	31%
Phone	18%	22%

# In-Store Pickup Location

## In-store pick up preferences are being met.

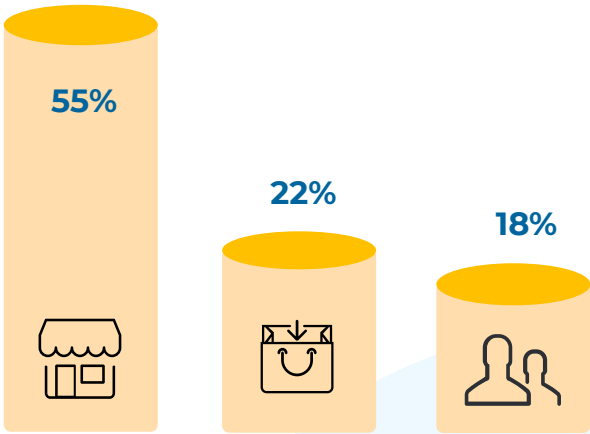
An in-store kiosk or pick up area is the most typically used method by a wide margin; it is also the most preferred by shoppers across the board. Boomers tend to dislike both the service desk and in-store self-service pod options. Gen Z, however, favors the self-service pod.

At the same time, just the fact of having to go into the store seems to be a bit of a let down: For all three in-store locations, satisfaction and likelihood to repeat the BOPIS experience were lower than if the customer didn't use that method. Perhaps implementing and emphasizing curbside pick up would lead to happier customers!

## Where they prefer to go to pickup order in store

		Not at all acceptable	Acceptable	Preferred
In-Store pickup area/kiosk		8%	68%	24%
In-store self-service pod where orders are stored		16%	64%	21%
Service Desk		19%	68%	13%

## Where they actually went in-store to pick up order



# Inside the Store

## Customers expect a better experience

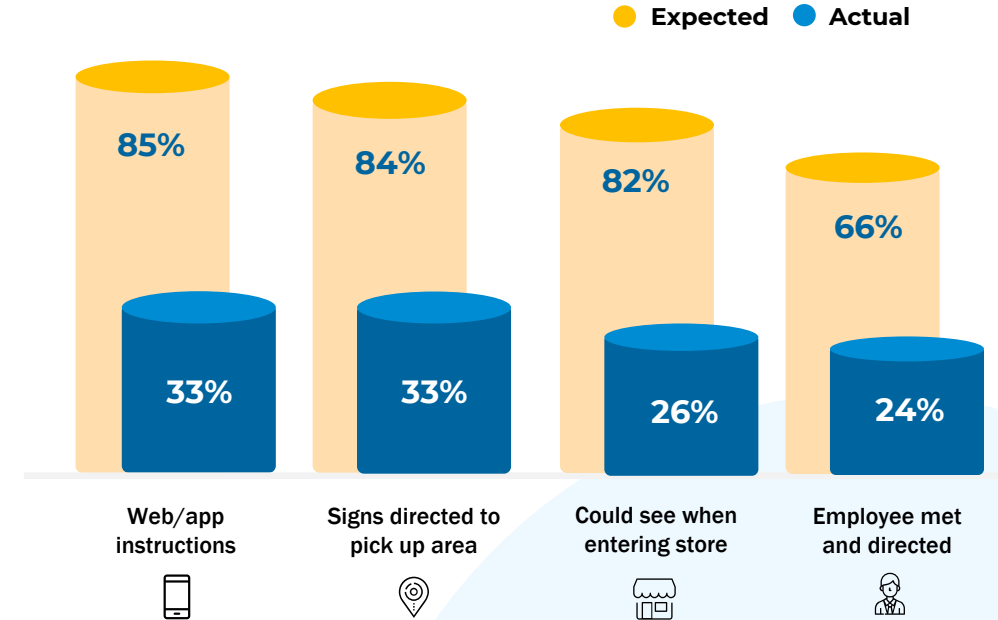
Customers bring high expectations to the in-store grocery pick up experience. In particular, they expect the store to make it easy through signage, easy visibility of pick up site when entering the store, and instructions from the app or website they used to order. Somewhat fewer expect an employee to meet and direct them, which is good news from a staffing perspective, and would likely not be needed if other information needs were prioritized.

Unfortunately, though, there is an immense gap between their hopes and their experiences. One-third or fewer had their experience meet their expectations for how they want or need to be directed to the pick up area. In fact, **10% had to track down an employee to help them**, while 30% relied on past experience with the process.

## Does this matter?

Having an employee greet and direct them increases their likelihood to reuse the BOPIS service at that store, as does having instructions from the website or app. Familiarity helps, too; customers who knew where to go from previous experience are more satisfied and more likely to repeat the experience in the future. Retailers should look for ways to encourage people to repeat their in store pick up experience to build loyalty.

## In Store Expectations vs. Experience



## A few differences in expectations:

- Signs less important to GenZ
- Employee greeters more important to West than Midwest
- Signs and greeters both more important to men than to women
- Expectations go up as income rises

NOTE: Expectations Q10a T2B, Experience Q10b.

# Curbside: Finding Pickup Location

How important were the following when arriving at the grocery store to pick up curbside order

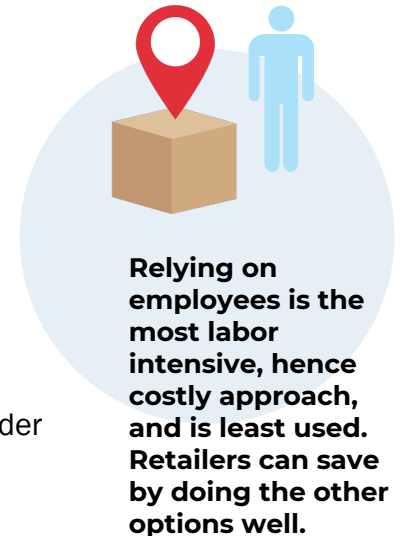
- 86% Signs outside directing customers to the area
- 85% Curbside pickup location is visible when driving into the parking lot
- 84% Instructions provided on the website / app when the order is placed
- 60% An employee outside directing customers to the location

## Focus on design to ensure a good experience

**Signs matter** and must be clear, especially if pick up location isn't obvious. And **don't neglect the app/website**—those instructions matter, too. From time to time, **retailers may change their process**. Be sure to communicate loudly and through all channels to avoid customer frustration, as **fully half rely on previous experience**. These repeat customers are more likely to keep returning so it's good to keep them happy.

When you arrived at the store how did you find the curbside pickup window?

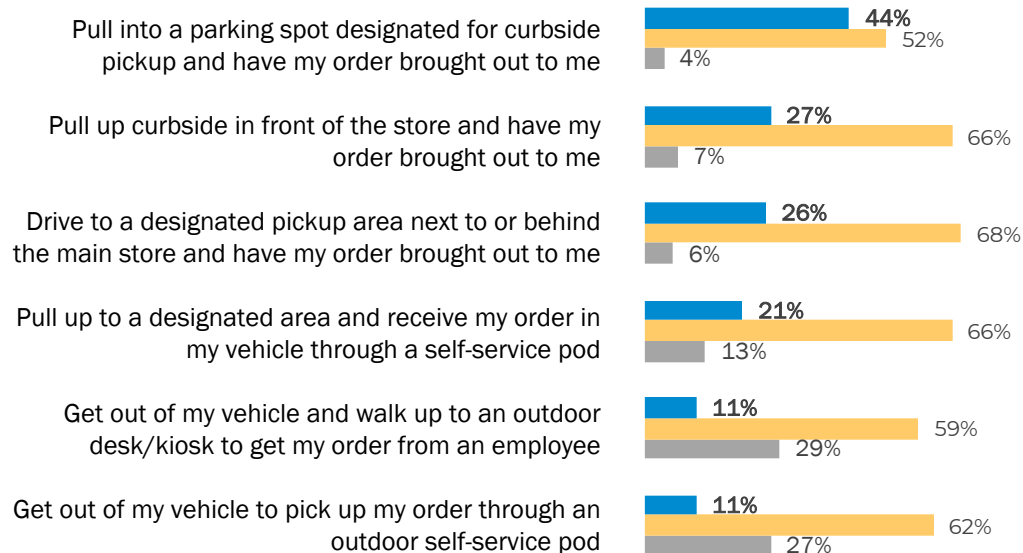
- 50% I knew from previous experience
- 46% There were signs directing me
- 44% I could see it when I drove into the parking lot
- 33% I had instructions from the website/app when I placed the order
- 15% An employee was outside directing customers to the location
- 7% I had to track down an employee and ask for directions



# Curbside: Retrieval Method

When picking up an online grocery order for curbside pickup, how acceptable are each of the following methods to retrieve your order?

● Not at all acceptable ● Acceptable ● Preferred



## Curbside Pickup Do's & Don'ts

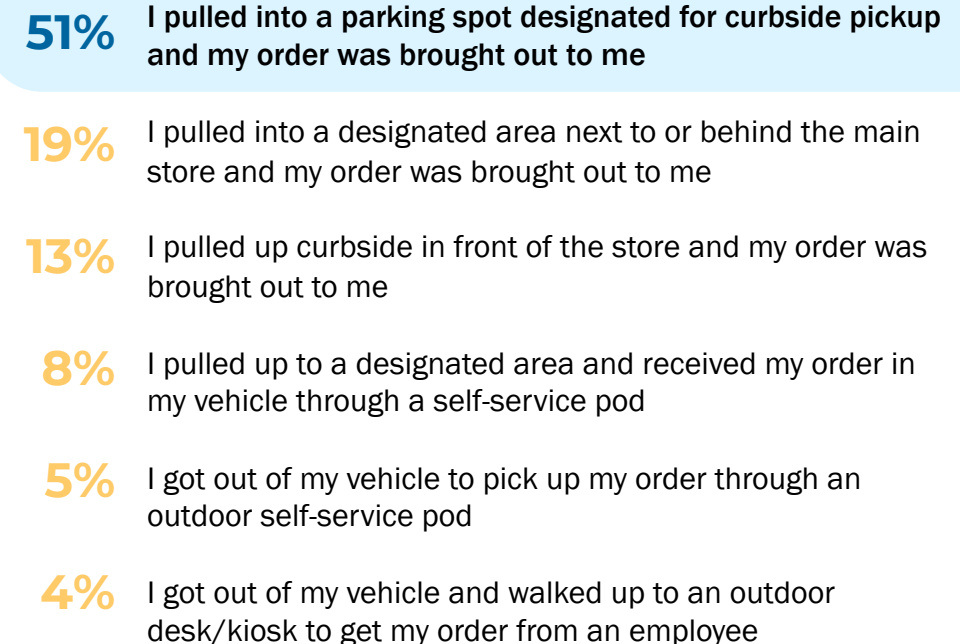
**Do:** Have special pickup parking spots with order brought to customer's car (Boomers especially love this!). This builds satisfaction and repeat usage.

**Second best:** Nearby pickup area or pulling up curbside. Also, GenX and younger are open to the self-service pod IF they don't have to get out of their cars. These also build positive satisfaction and repeat usage ratings.

**Do not:** Ask shoppers to get out of their car to get their order!



How did you retrieve your order?



# Curbside: Informing the Store

When picking up an online grocery order for curbside pickup, how acceptable are each of the following methods of letting the store know you've arrived to pick up your order?



## Retailers have several acceptable options at pickup time

Customers are especially open to texting the store or having the store watch for them/come to the car to ask for order info. Calling or using the app isn't quite as favored but those who use these tools are more likely to repeat usage in the future (and GenX and younger tend to like it). However, **it's not ok to expect customers to walk up and let the store know they're there. Don't put the burden on the customer!**

How did you let the store know you had arrived to pick up your order?

**29%** I called a designated phone number



**27%** I notified the store on their app or website

**19%** I texted a designated number

**12%** An employee came to my car and asked for my order information

**6%** They saw me pull up/park

**4%** I had to walk up and let them know

**3%** I didn't need to notify anyone - I used a self-service pod



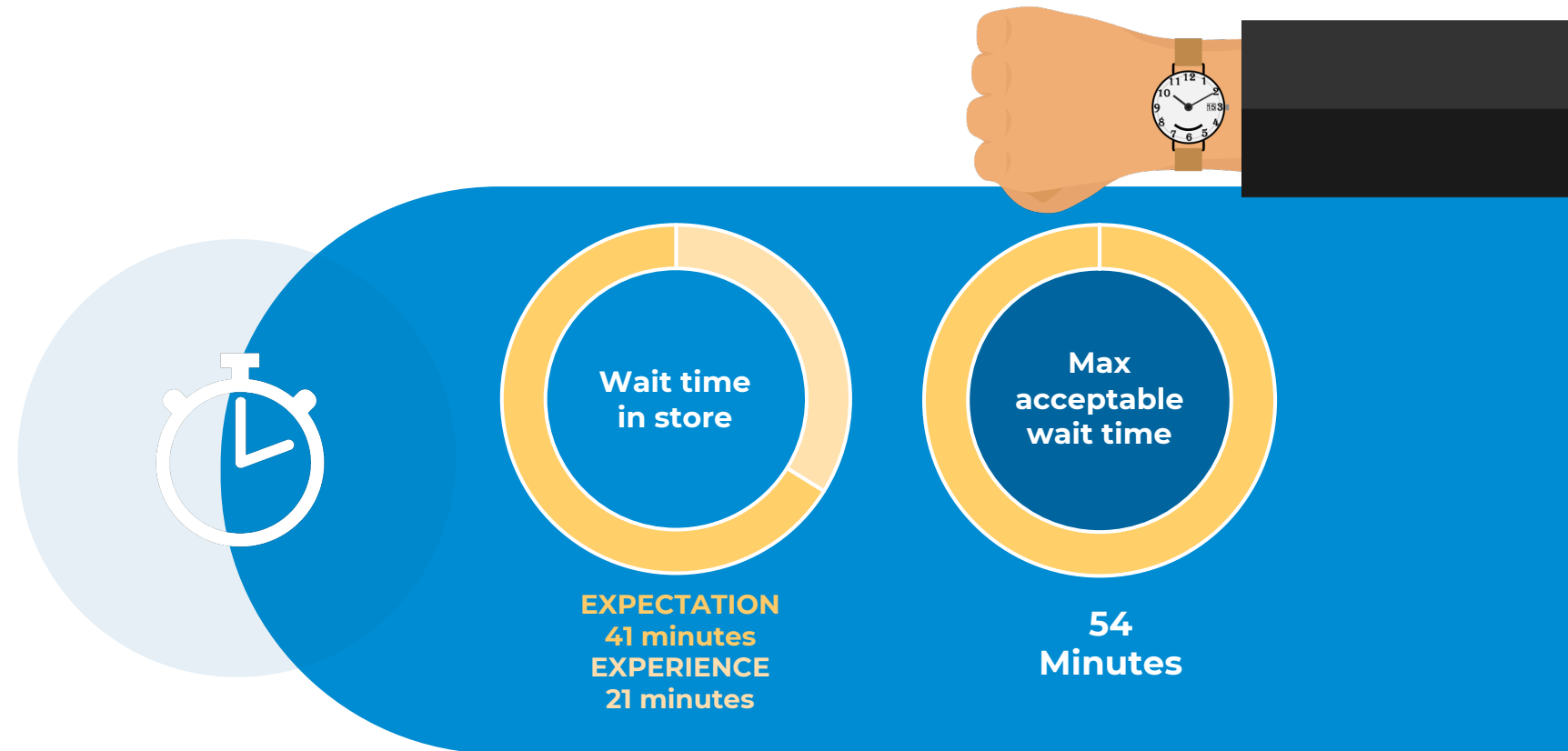
# About Pickup Wait Time

## So far, so good...

BOPIS shoppers seem resigned to long pickup waits for their groceries: they expect to wait about 40 minutes and say they'd wait even longer. Yet, in practice, they "only" wait 21 minutes on average.

## But...

How long will this remain acceptable? These times are likely influenced by even longer times while BOPIS was ramping up earlier in the pandemic. 20 minutes is a long time to wait in your car or in a kiosk. The wise retailer would not be taking this for granted and will be looking for ways to speed it up and delight their shoppers.

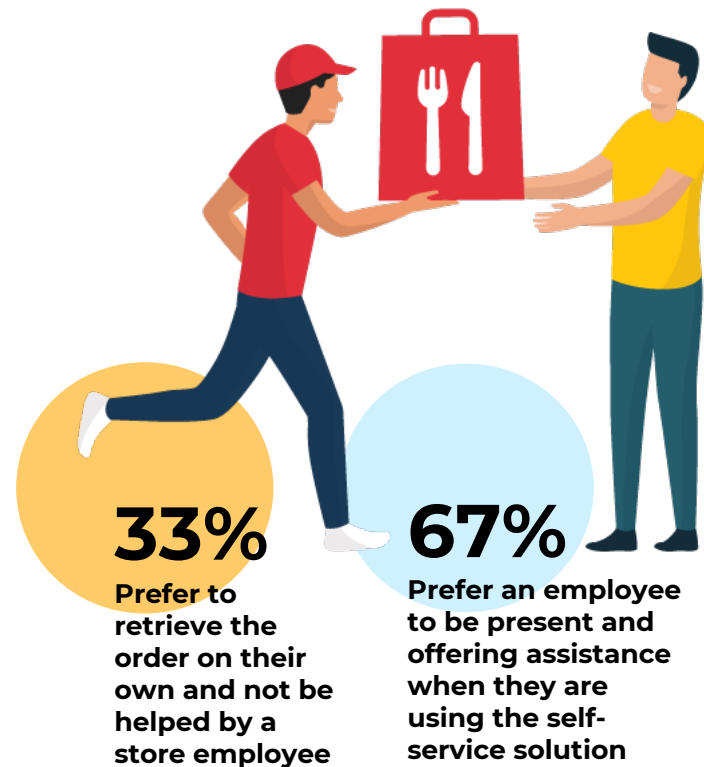


# Self-Service Pickup

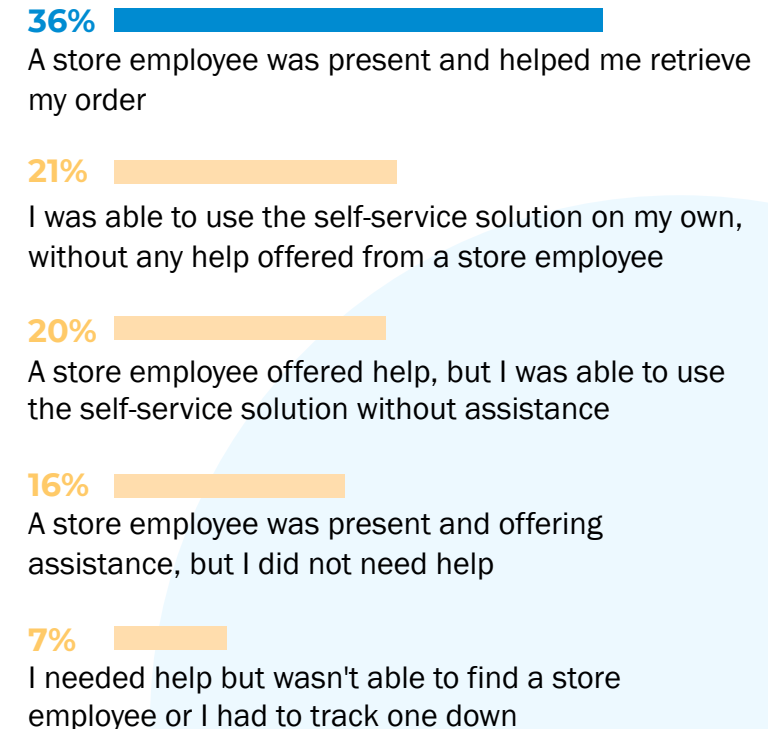
## Have help on hand!

About one fifth of shoppers use self-service. And, though they may not need help, they clearly prefer having the option to get assistance if needed. This is borne out by their experience: most received help or had the option for help even if they didn't need it.

P.S. Don't be in the small group that let their customers down by not having help available when needed!



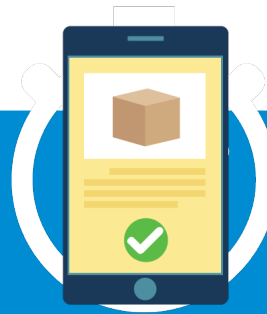
**You mentioned you used the self-service solution to retrieve your order. How did you retrieve your order?**



# Self-Service technology

## Performance expectations are very high!

Fast, safe, convenient, and easy: Not asking for much! And, while the ratings aren't bad, there are opportunities to improve the self-service technology that retailers are offering.



How important is that automated self-serve technology for grocery pick up be?

89%

Fast

89%

Give me confidence it kept my items safe

88%

Convenient

86%

Easy to use

How would you rate your experience with the automated self-serve technology?

68%

71%

72%

72%



GenXers and men are, overall, more satisfied with the technology.

Watch out on safety—there are concerns among GenZ, Boomers, and people in the Western US

# Tobacco/Alcohol Verification

## Verification is important to shoppers

Preferences on which verification approach are mild. More seem on board with showing ID to an employee, but this may be because it's the most typical approach. Some groups (Millennials, GenX, and men) are more open to automated verification. It's not OK, though, to have NO verification process! This is even more important to women.

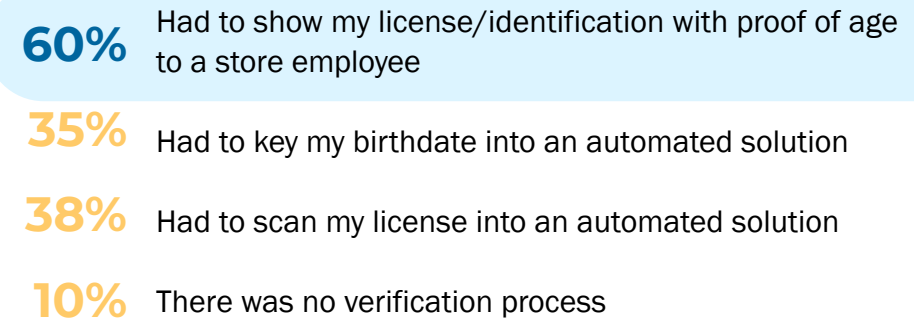
### How acceptable are each of the following methods of verification when you pick up your order with restricted items?

● Not at all acceptable ● Acceptable ● Preferred



For context:  
35% usually order alcohol  
and 20% usually order tobacco products

### What was the verification process when you picked up your order?



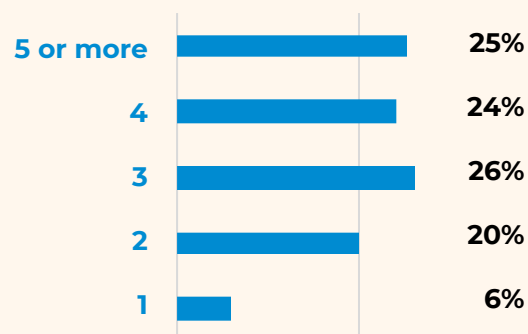
# Grocery Shopping Habits

Among customers from “Expectations” sample

## BOPIS usage has grown during the pandemic

In-store shopping has shrunk from 60% to 43%. And, while all BOPIS options are larger now, the growth is most substantial for curbside pickup, increasing from 12% to 21%.

How many times in the last month have they shopped for groceries?



What % of total grocery trips in the last month were...



Before the pandemic, about what % of your total grocery trips were...

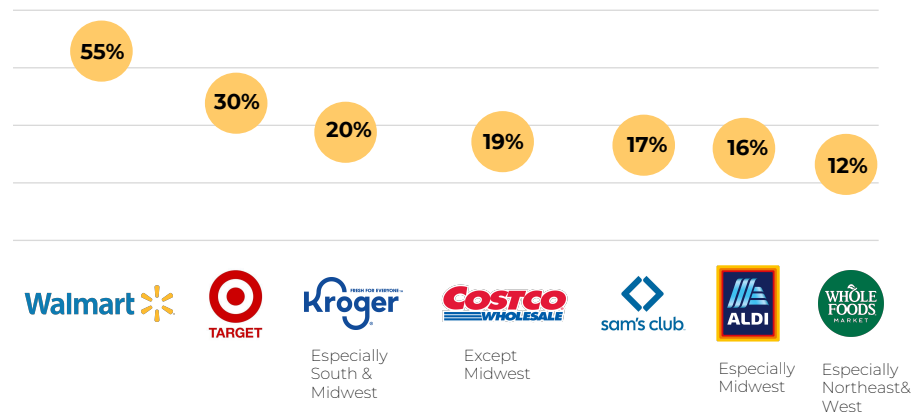


# Typical Shopping Behavior

## BOPIS customers shop for a full range of products

All core product areas are fair game for store pickup, indicating confidence that fresh, refrigerated, and frozen foods will be handled appropriately by the store. Notably, Millennials and GenXers, as well as city dwellers are more interested in ordering alcohol and tobacco. And be sure to have a good smart phone interface if you want to satisfy younger shoppers!

## Where they shopped online for pickup at store in past three months

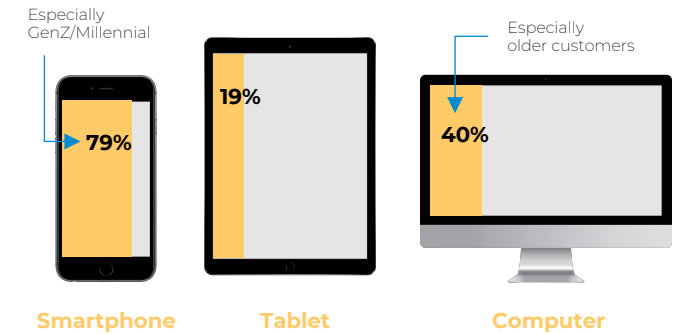


## Other regional players

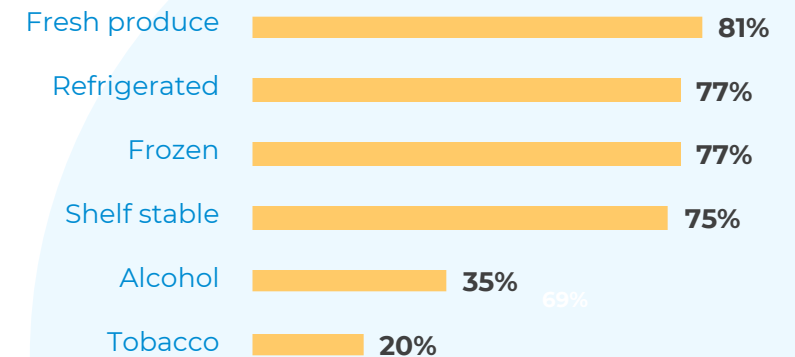


## How they shop

Device typically used to place online grocery order



## Products they order

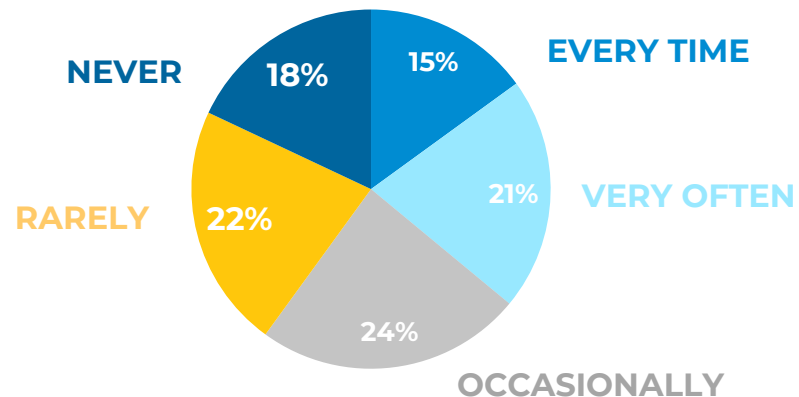


# Other Shopping Behavior

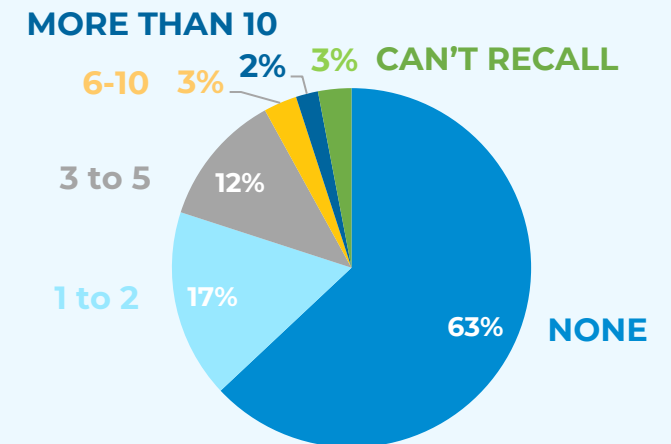
## BOPIS provides opportunity for additional sales

Retailers can count on picking up other products for about a full third of shoppers. And for some of these shoppers, they pick up 3 or more items. There may be opportunities to further promote impulse purposes by making it easy for customers to add more items to their order on the spur of the moment. For example, retailers may add impulse-friendly items to endcaps and special checkouts near pick up areas.

When picking up your online grocery orders, how often do you pick up additional products that weren't part of your original order?



While at the grocery store picking up your order, how many, if any, additional products did you pick up that weren't part of your original order?



# Demographics

● Expectation ● Experience

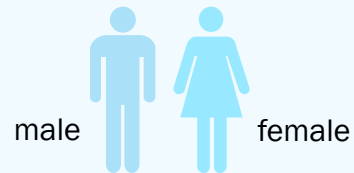
## Generation

Generation Z	10%	10%
Millennials	38%	30%
Gen X	32%	35%
Baby Boomers	16%	21%
Silent Generation	2%	2%

Average  
age  
**41.3**  
years

Average  
age  
**43.1**  
years

## Gender/Race/Ethnicity



male female

41% 58%  
38% 61%

African American /Black	14%	11%
Asian	6%	6%
Caucasian /White	72%	77%
Hispanic	14%	10%

## Status

27% 27%  
Single,  
never married

59% 59%  
Married/  
living together

11% 12%  
Previously  
married

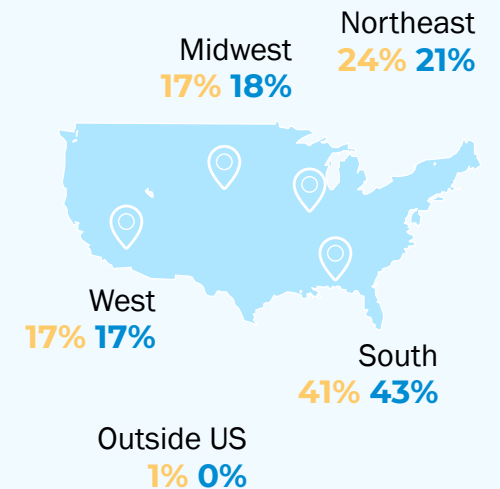
## Community Type

44% 38%  
Urban

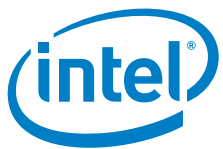
41% 46%  
Suburban

15% 16%  
Rural

## Region







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Durham, NC 27713

## INTEL

Intel is helping retailers turn their data into powerful new insights from edge to cloud through the combination of IoT, AI, and 5G. These data-centric solutions result in highly curated experiences, improved inventory and supply chain efficiencies, and the ability for customers to get what they want, where they want it, with less friction.

## BELL HOWELL

Bell and Howell is one of the largest and most sophisticated service organizations in North America, leveraging innovative technologies and unrivaled service capabilities to help its customers increase efficiency, reduce costs, and improve their customer experience.

Boasting a rich history and expertise in mechatronics and workflow efficiency, the company offers a complete portfolio of outsourced service offerings, as well as comprehensive automation solutions in retail click-and-collect and mail manufacturing. Headquartered in Durham, N.C., Bell and Howell has more than 800 highly skilled field technicians, 24/7/365 customer service and technical support centers, as well as advanced remote monitoring and diagnostic capabilities.