



# CONSUMER BOPIS USAGE AND SENTIMENT STUDY PART ONE

Commissioned by



# KEY FINDINGS: CONSUMER BOPIS USAGE

BOPIS usage is exploding, and retailers need scalable and financially viable fulfillment methods that they're confident consumers will accept in these uncertain times. So, Package Concierge® commissioned a study through Hanover Research where we asked consumers about their order pickup preferences and methods used during the most recent holiday shopping season.

Part One of the Key Findings from that research includes:

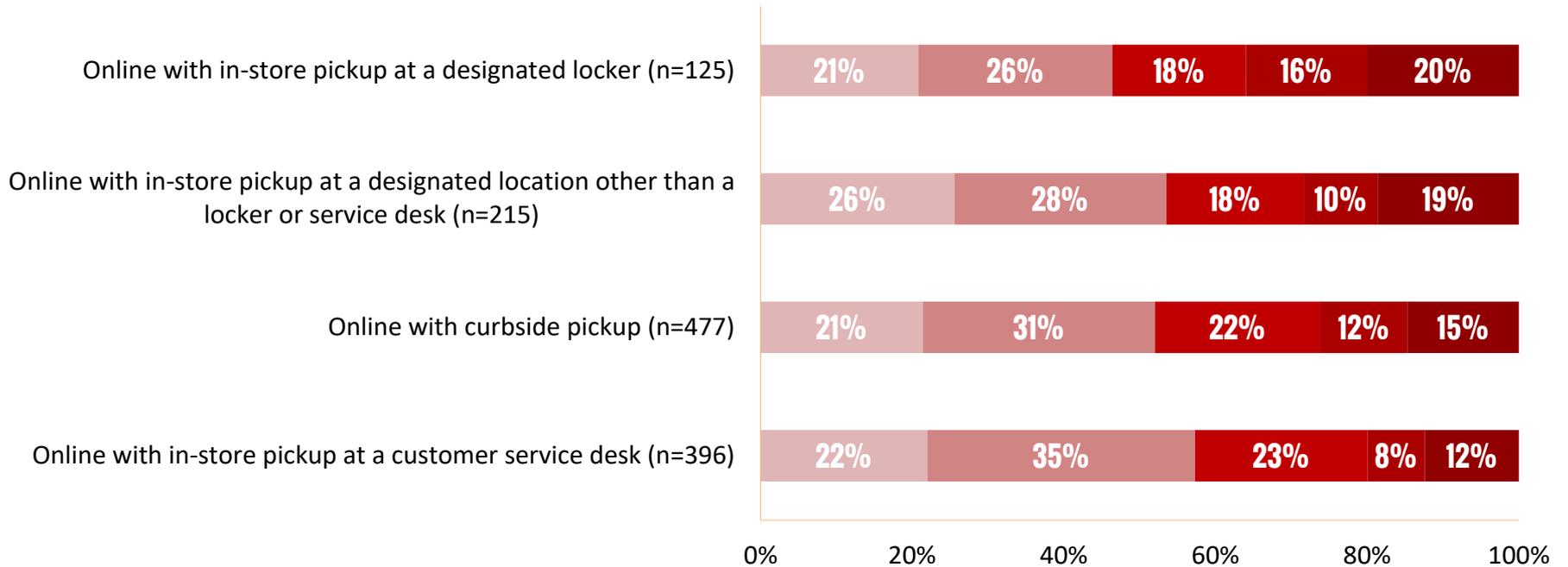
- ✓ **More than half of consumers plan on maintaining their current frequency of BOPIS usage over the next year, while about a third will increase usage of BOPIS methods.** Over the holiday season, most consumers used a BOPIS method one to three times per month. One in five consumers (20%) that used a BOPIS locker over the holiday season used this method five or more times per month.
  - ✓ Consumers under age 40, as well as consumers with children under 18, are more likely to increase their BOPIS usage over the next 12 months.
- ✓ **Many consumers (42%) who did not use a BOPIS method during the holiday season tended to use direct delivery methods instead.** However, consumers appear to be open to using a BOPIS method in the next 3 months, as nearly half (48%) say they are likely to use a BOPIS method, while about a quarter (23%) are neutral which indicates they could be influenced.
- ✓ **Product availability is the most important (91%) feature to consumers when selecting a delivery method,** followed by shipping costs (88%) and ease of ordering (85%).
- ✓ **Over half of consumers (53%) also report that locker options would influence their choice of retailer when shopping.**

# MOST RESPONDENTS USED BOPIS MORE THAN ONCE DURING THE HOLIDAYS

Approximately one in five respondents used a BOPIS fulfillment method five or more times during the holiday season. The method with the most repeat users for in-store pickup was automated lockers, where one in three respondents utilized this BOPIS fulfillment method four or more times.

## FREQUENCY OF BOPIS USE

■ 1 ■ 2 ■ 3 ■ 4 ■ 5 or more times



# DIRECT DELIVERY WAS THE MOST COMMON REASON RESPONDENTS DID NOT USE A BOPIS FULFILLMENT METHOD OVER THE HOLIDAY SEASON

Of the nearly 5,500 non-BOPIS respondents, most stated it was more convenient to have their purchases shipped to their homes. A third said it was because they prefer to see products in-person before purchasing, and nearly another third didn't know about or have access to any BOPIS fulfillment options.

## REASONS FOR NOT USING BOPIS FULFILLMENT METHOD(S)

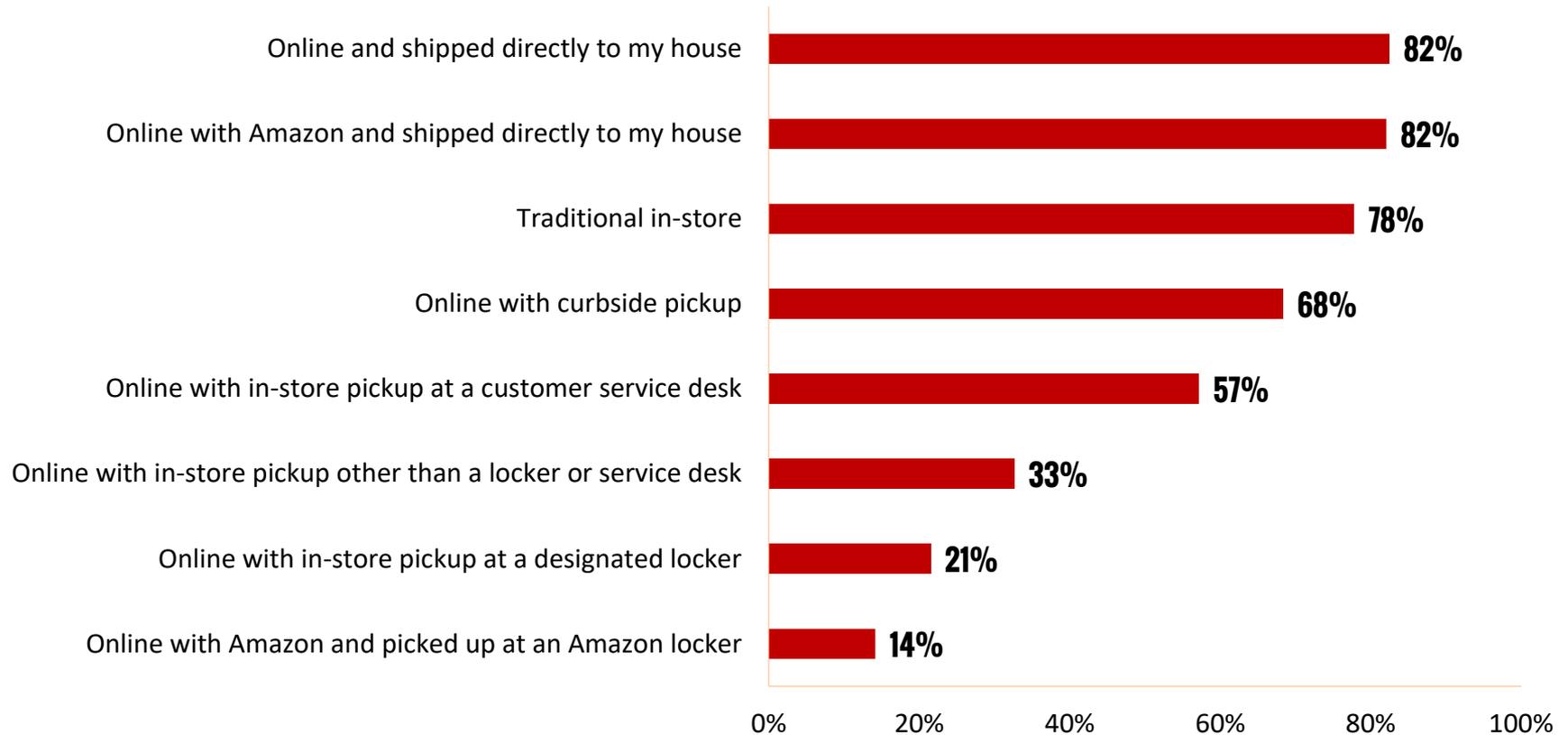


Q: Why have you not purchased a non-grocery product online for in-store or curbside pickup over the holidays? (n=5,435)

# BOPIS USERS RETRIEVED THEIR HOLIDAY ORDERS VIA MORE THAN ONE FULFILLMENT METHOD

Shoppers didn't use just one method to retrieve their orders, meaning it is important for retailers to offer multiple methods of fulfillment.

## PURCHASE METHODS USED OVER PAST 3 MONTHS

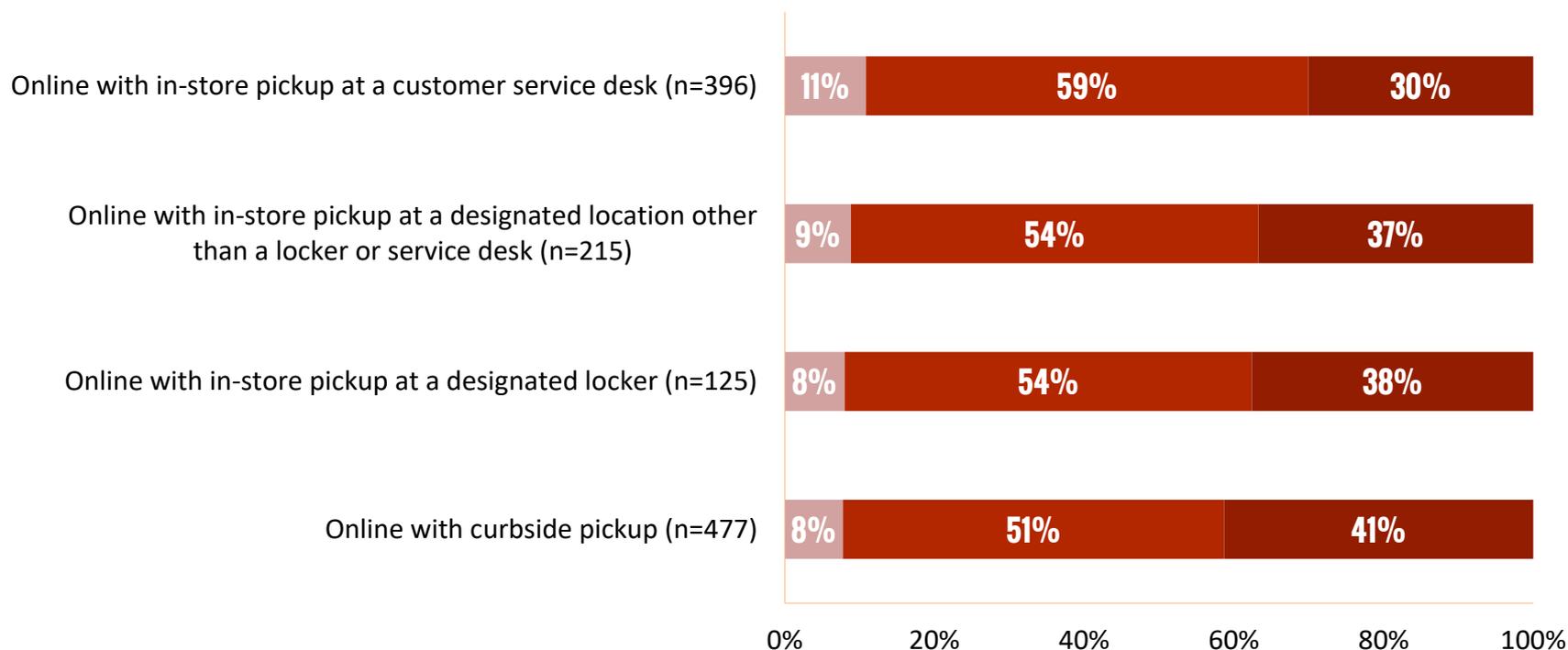


# BOPIS USERS WILL LIKELY INCREASE USAGE OVER THE NEXT 12 MONTHS

Over one third of respondents who used BOPIS during the holidays, regardless of fulfillment method, state they will increase their BOPIS usage in the coming year.

## CHANGES TO BOPIS FREQUENCY

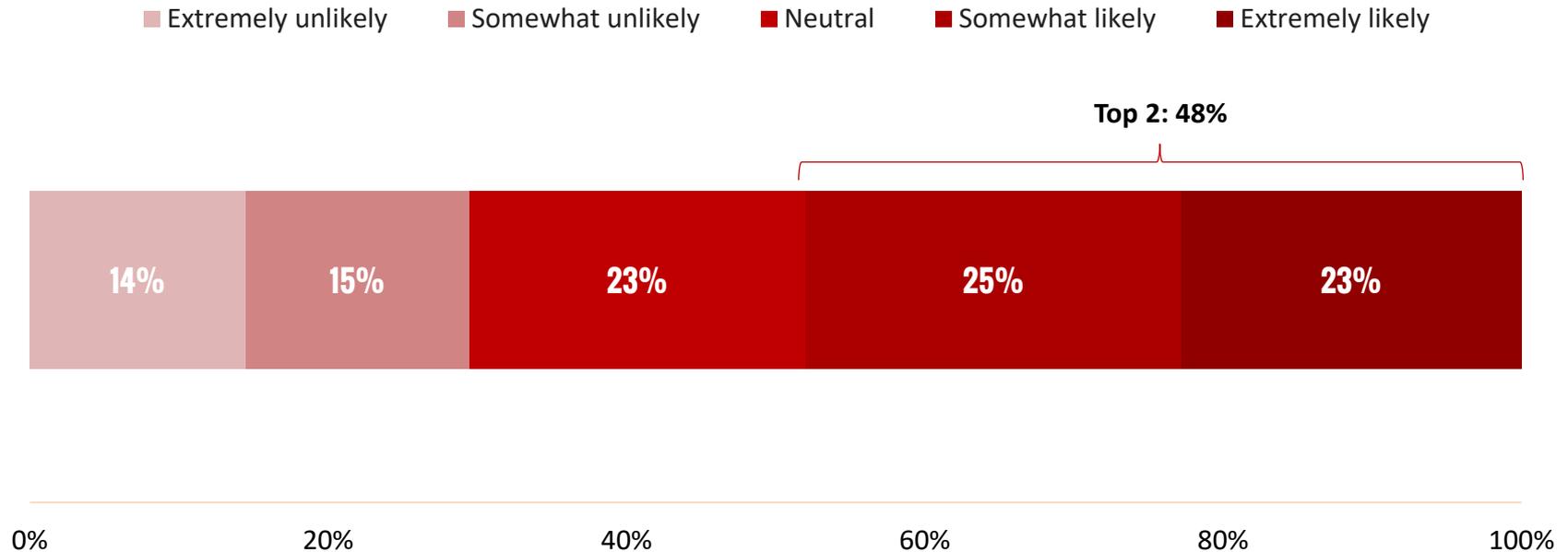
■ I will use it fewer      ■ About the same      ■ I will use it more



# NON-BOPIS USERS LIKELY TO INCREASE USAGE OVER THE NEXT 12 MONTHS TOO

Nearly half of non-BOPIS users (48%) state they are likely to use a BOPIS fulfillment method in the next three months despite not using it during the holidays. And while nearly a quarter are neutral, this simply suggests that they could be influenced to use an in-store BOPIS fulfillment method in the coming months.

## LIKELIHOOD TO USE BOPIS FULFILLMENT METHODS IN NEXT THREE MONTHS (NON-USERS DURING HOLIDAYS)



# PRODUCT AVAILABILITY MOST IMPORTANT FEATURE FOR METHOD SELECTION

Respondents stated that product availability was Extremely and Very important in their decision making for BOPIS fulfillment method selection. Other important considerations cited by respondents includes the delivery method's speed of service, reliability, convenience, and tracking abilities.

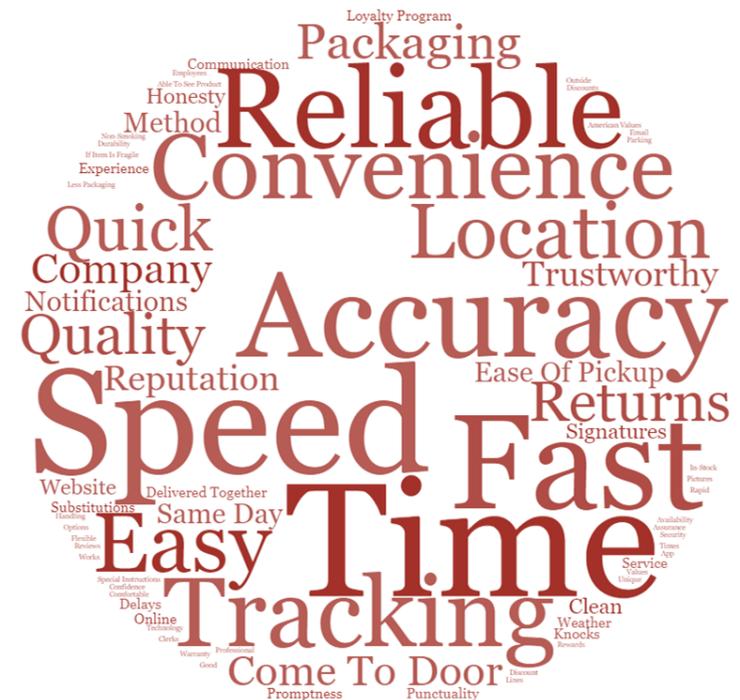
## IMPORTANCE OF FEATURES IN SELECTION OF DELIVERY METHOD

*Top 2 Box includes "Extremely" and "Very" Important*



## OTHER IMPORTANT FEATURES

*Open Ended Responses*



# SATISFACTION WITH BOPIS FULFILLMENT METHODS IS DRIVEN BY THE FLEXIBILITY THEY OFFER AND ABSENCE OF SHIPPING FEES

Locker users cited they liked the convenience to pickup items any time of the day and easy retrieval more than other features.

## MOST LIKED FEATURES

	Customer service desk (n=396)	Curbside (n=477)	Location other than a locker or service desk (n=215)	Locker (n=125)
I don't have to pay a shipping fee	65%	61%	50%	32%
I know my products are in-stock without having to leave my house	41%	38%	33%	28%
I can pick-up any time of day	40%	31%	39%	46%
My products are ready in a timely manner	37%	37%	33%	30%
It's easy to retrieve items	29%	28%	32%	43%
I know my products are safe	25%	18%	28%	33%
I have minimal interaction with people	23%	47%	29%	31%
I can safely support local businesses	10%	14%	21%	19%
Other	1%	3%	0%	2%

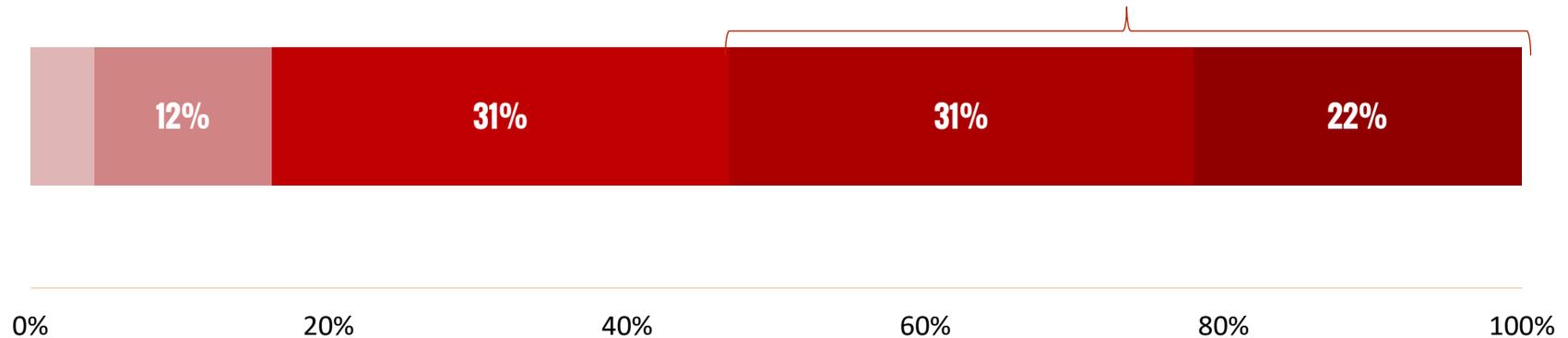
# LOCKER PICKUP OPTIONS ARE LIKELY TO INFLUENCE RETAILER CHOICES

For respondents who indicated they would use an automated locker for order pickup, over half stated it would be extremely or very influential on the retailer they choose to do business with.

## INFLUENCE OF LOCKERS ON RETAILER CHOICE

■ Not at all influential ■ Slightly influential ■ Moderately influential ■ Very influential ■ Extremely influential

Top 2: 53%

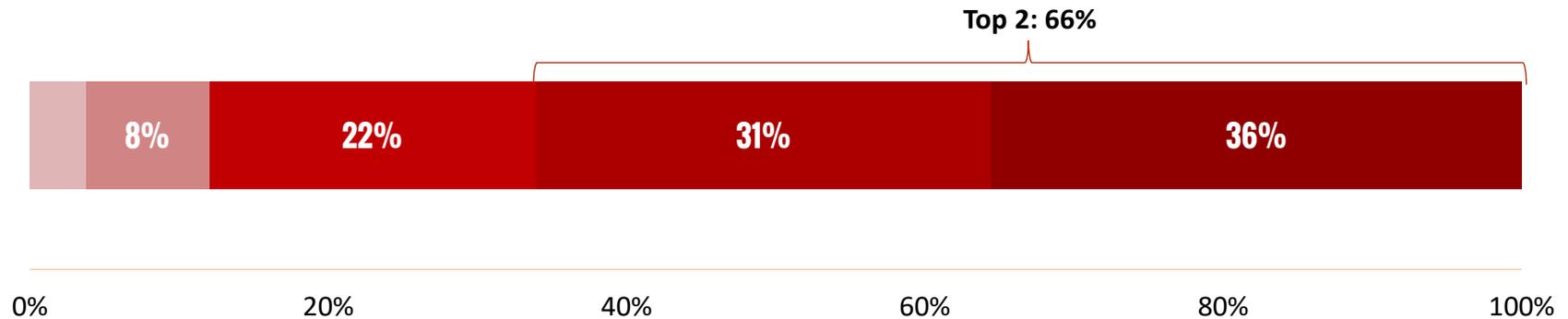


# TWO THIRDS WOULD USE AUTOMATED LOCKERS FOR PICKUP IF OFFERED

Most respondents stated they would use automated lockers for order pickup if offered by the retailer, with over a third stating they definitely would use them.

## LIKELIHOOD OF USING LOCKERS

- Definitely would not use the automated lockers
- Probably would not use the automated lockers
- Might or might not use the automated lockers
- Probably would use the automated lockers
- Definitely would use the automated lockers



# STUDY OVERVIEW

## SURVEY ADMINISTRATION & SURVEY SAMPLE

- ✓ The survey was administered online, and respondents were recruited via a panel.
- ✓ The BOPIS user analysis includes a total of 982 respondents following data cleaning and quality control.
- ✓ An additional 5,435 respondents were included in the non-BOPIS user analysis.

## RESPONDENT QUALIFICATIONS

- ✓ Must be 18 years or older
- ✓ Must be a US resident
- ✓ Must have purchased a non-grocery item using a BOPIS method during the 2020 holiday season (Nov 1 – Dec 31)
  - ✓ Respondents included in the non-BOPIS analyses must have either purchased online (but not using a BOPIS fulfillment method and/or not during the holidays) or must have used an Amazon locker.

## ABOUT HANOVER RESEARCH

Founded in 2003, Hanover Research is a global research and analytics firm that delivers market intelligence through a unique, fixed-fee model to more than 1,000 clients. Headquartered in Arlington, Virginia, Hanover employs high-caliber market researchers, analysts, and account executives to provide a service that is revolutionary in its combination of flexibility and affordability. Hanover was named a Top 50 Market Research Firm by the American Marketing Association in 2015, 2016, 2017, 2018, and by the Insights Association in 2019. To learn more about Hanover Research, visit [www.hanoverresearch.com](http://www.hanoverresearch.com).

## ABOUT PACKAGE CONCIERGE®

Navigate BOPIS order fulfillment with ease by using the trusted provider of automated locker solutions. With millions of transactions, Package Concierge® combines expertise and technology to seamlessly automate fulfillment processes for retailers and distributors. As the only vertically-integrated solution, Package Concierge® products are built in the U.S.A. and powered by proprietary software to deliver on security, design and functionality. By collaborating with customers to understand and address their evolving needs, Package Concierge® delivers the highest quality solutions to optimize operations and enhance user experiences. Put us to the test! Visit [www.packageconcierge.com/retail](http://www.packageconcierge.com/retail) to schedule your consultation and begin your own pilot program.

# RESPONDENT CHARACTERISTICS



## Age (n=982)

18 to 39 (Gen Z/Millennials)	39%
40-55 (Gen X)	29%
56+ (Baby Boomers/Silent Gen)	32%



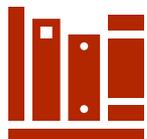
## Gender (n=982)

Male	32%
Female	68%
Other	<1%



## Region of Residence (n=982)

Midwest	23%
South	36%
West	20%
Northeast	21%



## Highest Level of Education (n=982)

Some high school	1%
High school diploma/GED	10%
Some college or technical training	20%
2-year degree	11%
4-year degree	28%
Some graduate school	4%
Graduate degree	27%
Prefer not to say	<1%



## Area of Residence (n=982)

Suburban	53%
Urban	29%
Rural	18%
Prefer not to say	<1%



## Marital Status (n=982)

Single	21%
Married or living as married	67%
Separated or divorced	8%
Widowed	3%
Prefer not to say	<1%



## Ages of Children in House (n=982)

<13	35%
13-18	24%
18+	14%
None	48%
Prefer not to say	1%



## Employment Status (n=982)

Employed full-time	49%
Employed part-time	8%
Self-employed student	5%
Unemployed	5%
Stay-at-home parent/caregiver	9%
Student	3%
Retired	17%
Unable to work	2%
Prefer not to say	1%



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