



BOPIS PICKUP OPTIONS: CONSUMER USAGE STUDY PART TWO

Commissioned by



KEY FINDINGS: BOPIS PICKUP OPTIONS

BOPIS pickup options have become a consumer expectation, and retailers need scalable and financially viable fulfillment methods that they're confident consumers will accept. 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 in order to assist retailers.

Part Two of the Key Findings from that research includes:

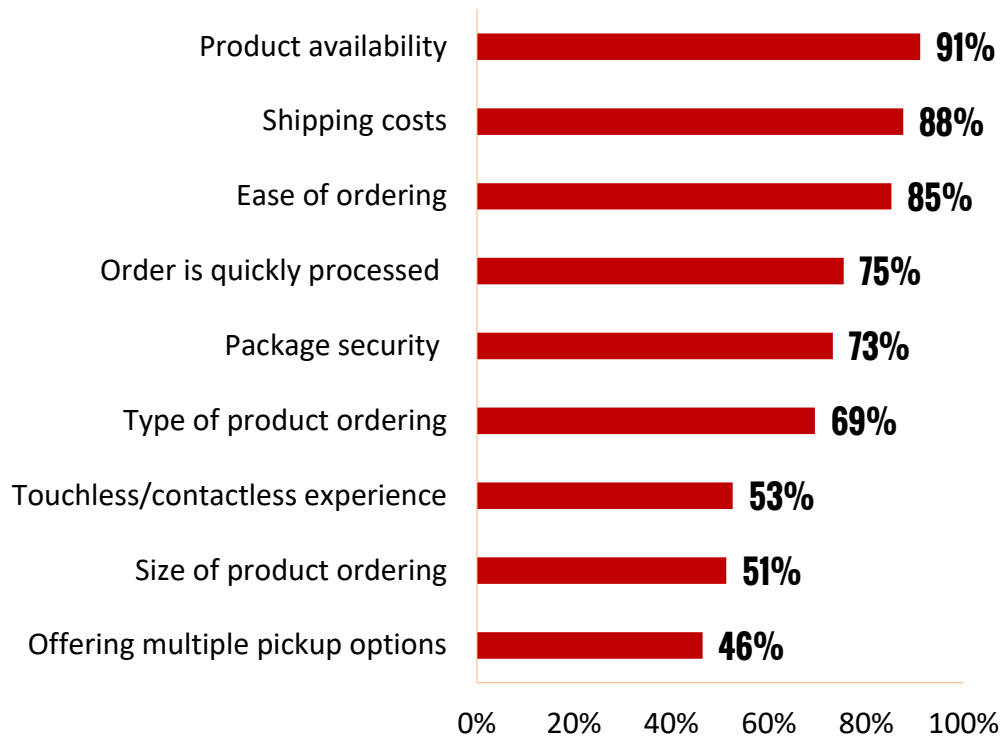
- ✓ **Curbside pickup was the most popular BOPIS method (68%),** while pickups at lockers were used by one in five (21%).
 - ✓ Lockers were utilized more by consumers under 40 (29%) and urban residents (34%).
 - ✓ Nearly two-thirds of all BOPIS purchases, regardless of method, were made at big box stores.
- ✓ **Product availability was the most important (91%) feature to consumers when selecting a delivery method,** followed by shipping costs (88%) and ease of ordering (85%).
- ✓ **Half of consumers (51%) would choose lockers over curbside pickup if these were their only BOPIS options.** Those who choose the lockers over curbside pickup believe it would be a more convenient offering (77%). Interestingly, those who would use curbside over the lockers cite the very same reason (convenience: 59%).
 - ✓ However, those who prefer lockers tend to have stronger beliefs that they are easier (50%) and faster (65%) than curbside.
- ✓ **Over half of consumers (53%) also report that locker options would influence their choice of retailers when shopping.**

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

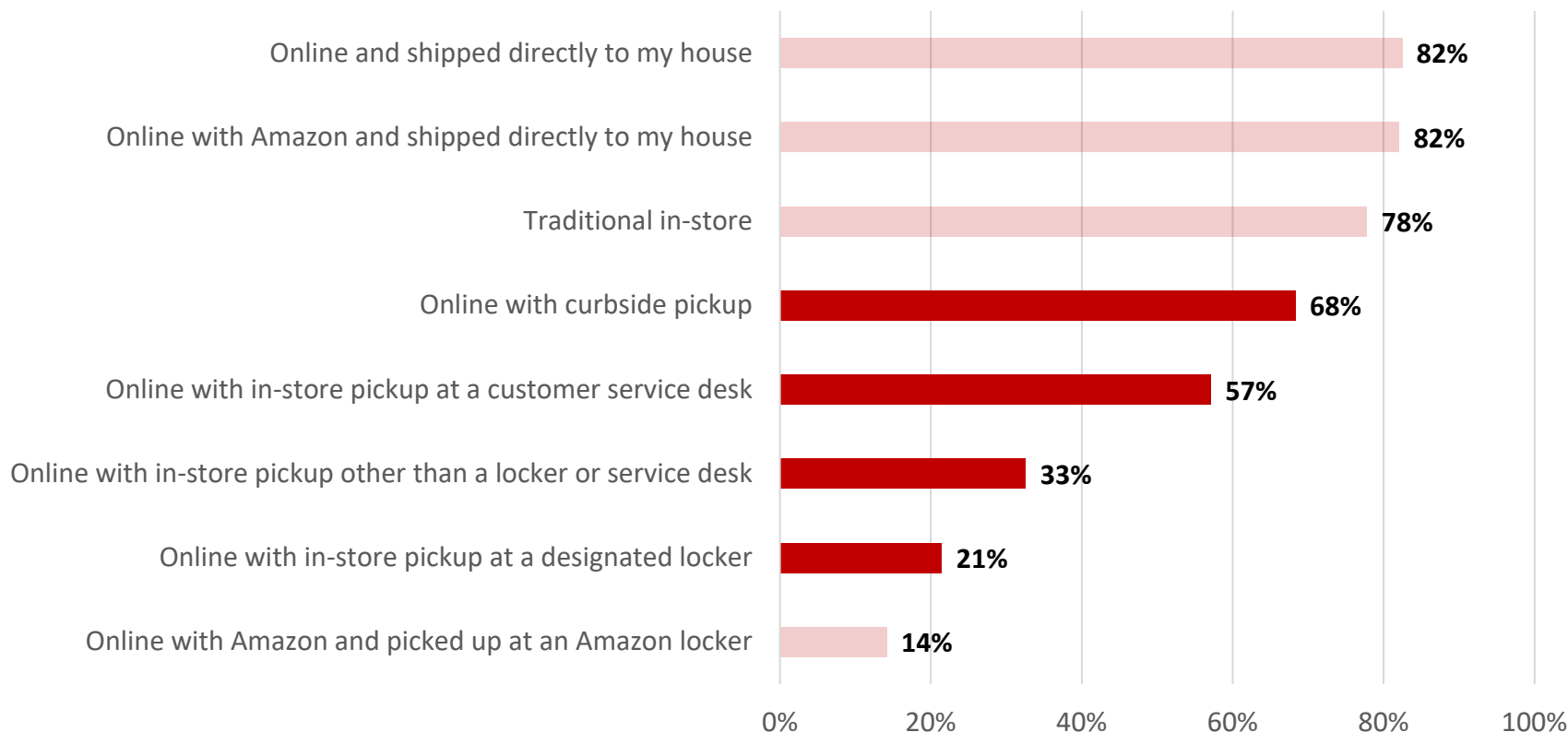


BOPIS USERS UTILIZED MORE THAN ONE FULFILLMENT METHOD

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

- Curbside pickup was the most used retrieval method for in store pickup
- Approximately one in five consumers have used an automated locker pickup method

ORDER DELIVERY METHODS USED



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

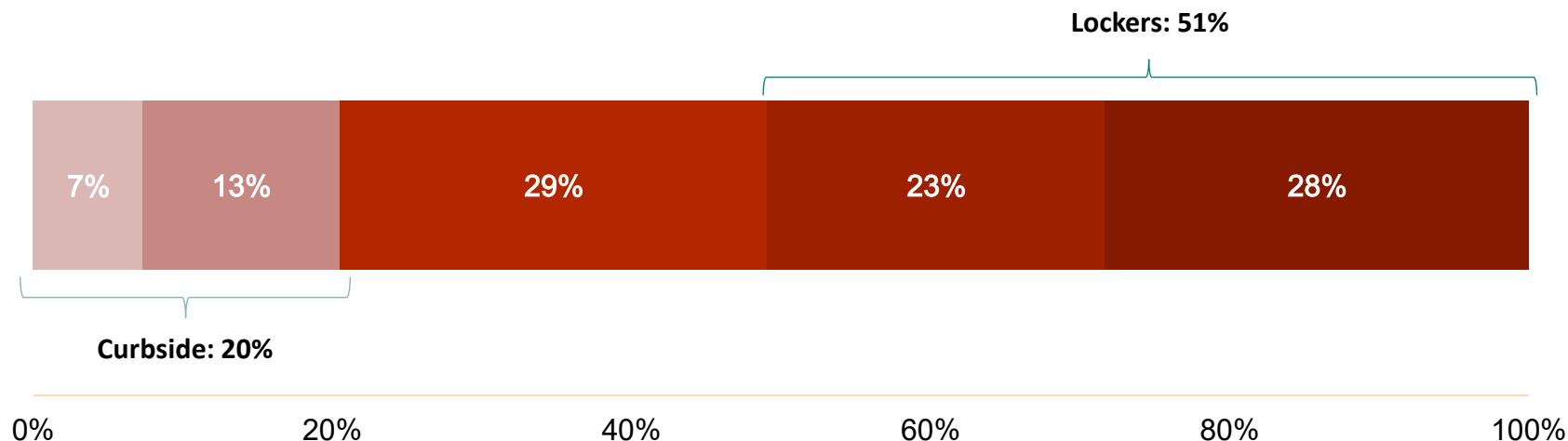
	Customer service desk (n=396)	Curbside (n=477)	Location other than a locker or service desk (n=215)	Locker (n=125)
I don't have to pay a shipping fee	65%	61%	50%	32%
I know my products are in-stock without having to leave my house	41%	38%	33%	28%
I can pick-up any time of day	40%	31%	39%	46%
My products 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%

CONSUMERS ARE MORE LIKELY TO USE LOCKERS THAN CURBSIDE

When given only two options for order pickup, the majority (51%) stated they would choose automated lockers

LIKELIHOOD OF USING LOCKERS OVER CURBSIDE

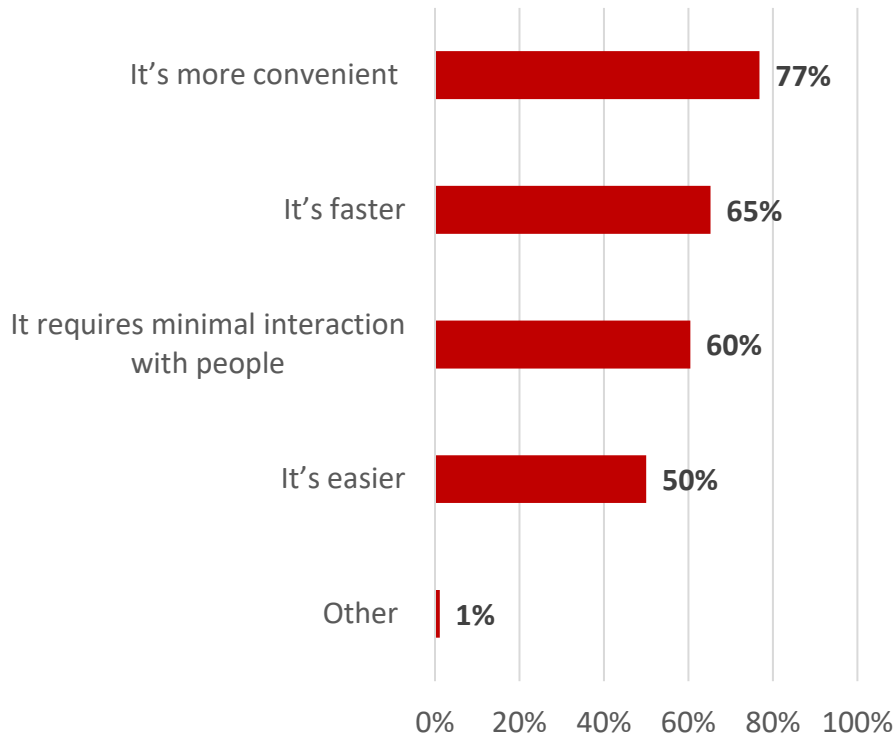
- Much more likely to use the curbside pickup option
- Somewhat more likely to use the curbside pickup option
- Equally likely to use both
- Somewhat more likely to use the automated lockers
- Much more likely to use the automated lockers



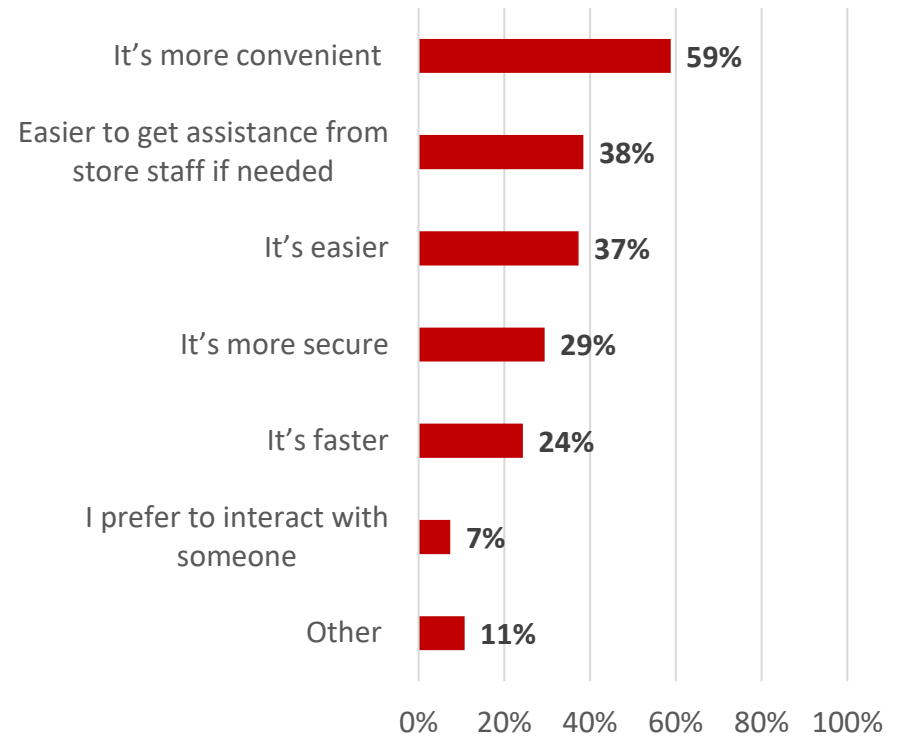
CONVENIENCE DRIVES PREFERENCE FOR PICKUP OPTIONS

Regardless of method selected, consumers cited convenience as their primary reason for choosing the offered pickup option. However, those who prefer lockers tend to have stronger beliefs that they are easier and faster than curbside.

Reasons For Locker Preference



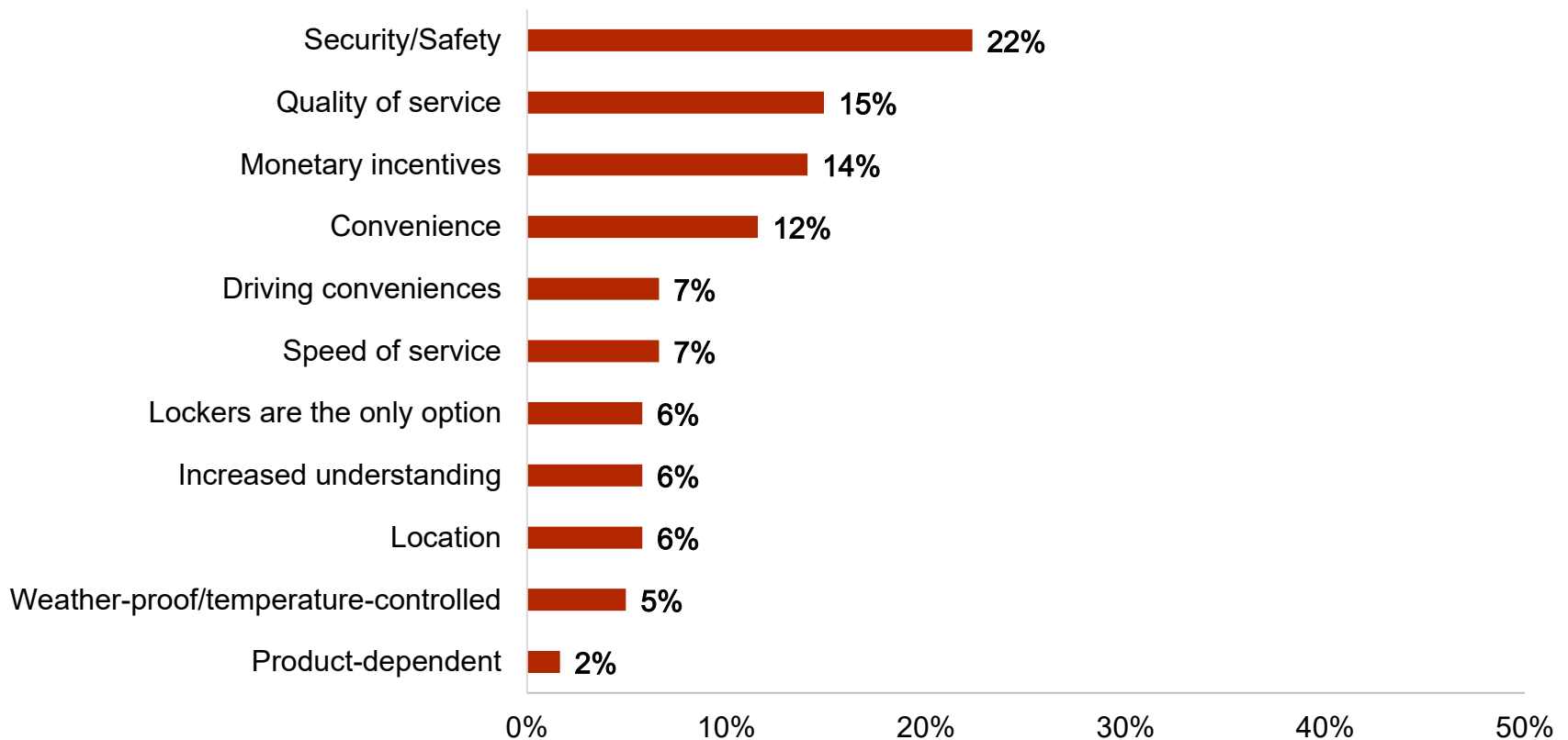
Reasons For Curbside Preference



CONSUMERS VIEW LOCKERS AS A SAFER ALTERNATIVE TO CURBSIDE

A quarter of the consumers who used curbside pickup stated they would consider using automated lockers primarily due to the safety and security lockers offer. The quality of service provided with the lockers was also important to consumers, including a desire for accurate orders and customer assistance when needed.

MOTIVATIONS TO SWITCH TO BOPIS LOCKERS



MOST CONSUMERS FIND AUTOMATED BOPIS LOCKERS APPEALING

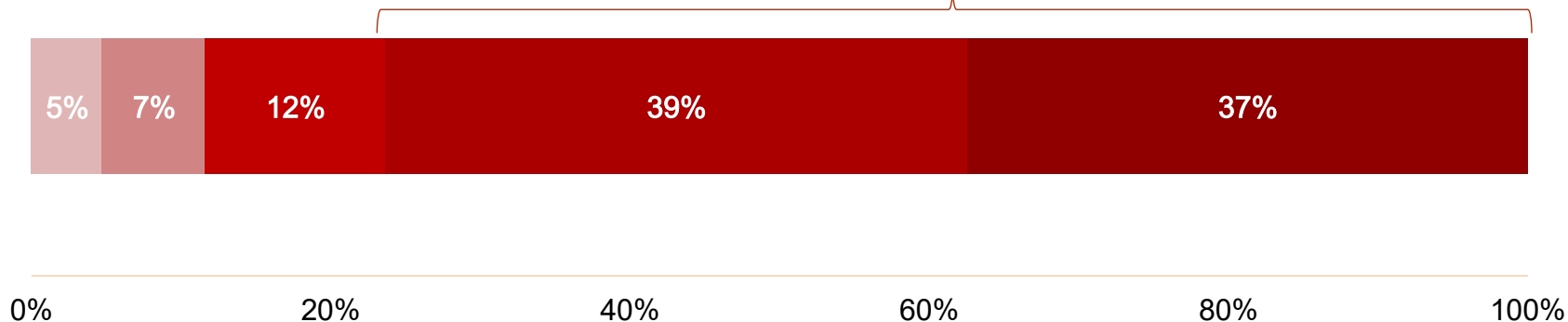
When shown an example of an automated retail locker being used in a retail location, most consumers (76%) found the option to be appealing.

- Appeal was notably higher among consumers under age 40 and consumers with children under 18.
- Rural residents were less likely to find the lockers appealing.

APPEAL OF LOCKERS

- Extremely unappealing
- Somewhat unappealing
- Neither appealing nor unappealing
- Somewhat appealing
- Extremely appealing

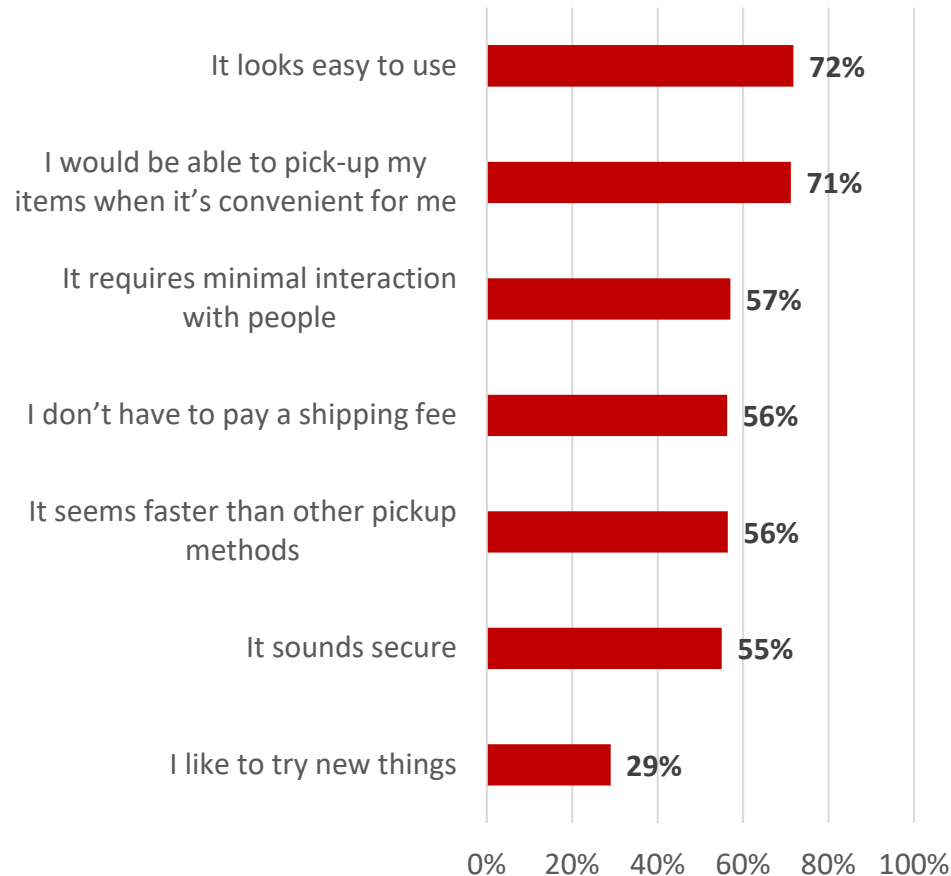
Top 2: 76%



THE LOCKERS' EASY TO USE APPEARANCE AND 24/7 CONVENIENCE DRIVES CONSUMERS' LIKELIHOOD TO USE

After viewing an image of an automated retail locker, most consumers (72%) cited they thought it looked easy to use. A similar majority (71%) stated they would be likely to use as they could retrieve their order when it was convenient for them.

Reasons Likely to Use Lockers

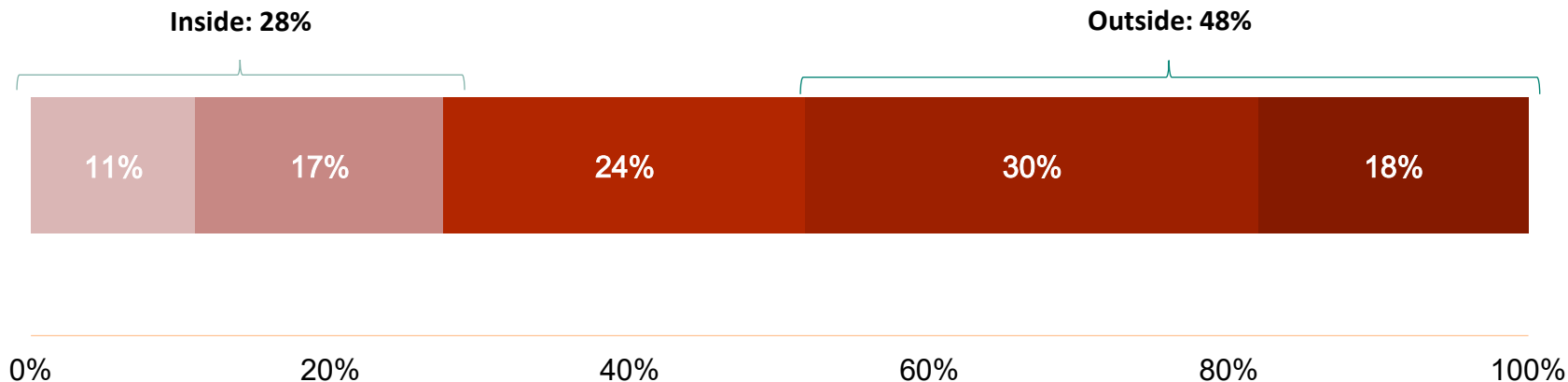


OUTDOOR LOCKERS ARE SLIGHTLY PREFERRED OVER INDOOR LOCKERS

Only a small percentage of consumers felt strongly on the actual location placement of automated lockers, with a similar percentage having no preference; giving retailers a lot of latitude in where they deploy their automated lockers for BOPIS order fulfillment.

LOCATION PREFERENCES

- Strongly prefer inside the store
- Somewhat prefer inside the store
- No preference
- Somewhat prefer outside the store
- Strongly prefer outside the store



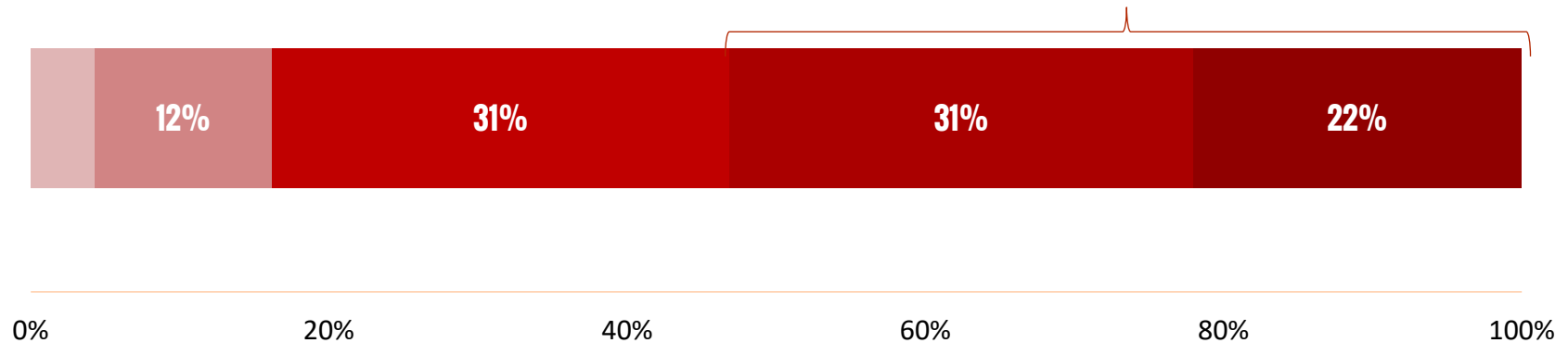
LOCKER PICKUP OPTIONS ARE LIKELY TO INFLUENCE RETAILER CHOICES

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%

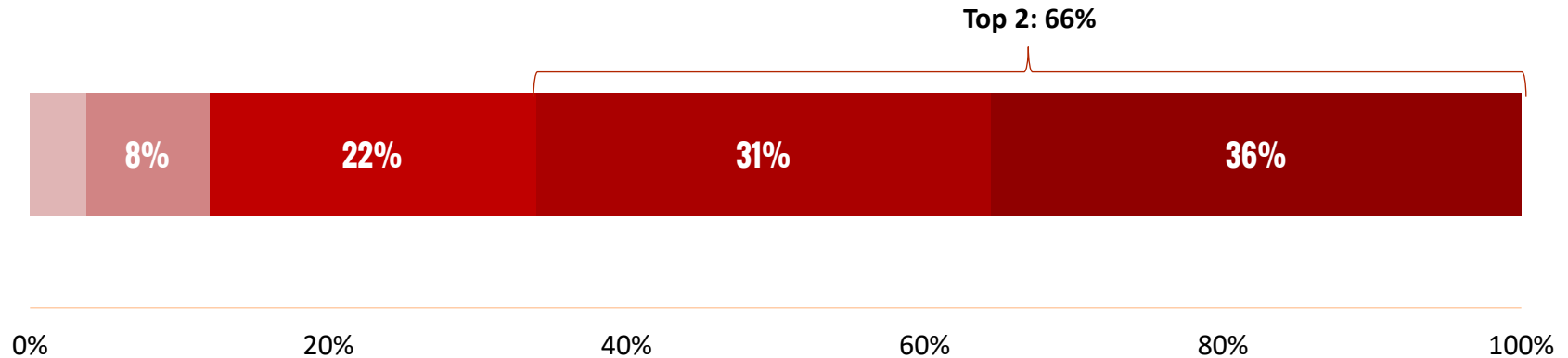


TWO THIRDS WOULD USE AUTOMATED LOCKERS FOR PICKUP IF OFFERED

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.

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 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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