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New Study From Ipsos Unveils Brands Best Adopting In-Store Pickup, Curbside, and Delivery Offerings

Walmart, Target, Sam's Club and Nordstrom Rank Among the Highest for Reimagined Customer Experience

New York, NY, October 9, 2020 — Today, Ipsos, the global research firm, announced the launch of the E-Commerce Experience Report: a mystery shopping study on buy-online-pickup-in-store (BOPIS), curbside, and delivery offerings of major brands nationwide. With consumers still anxious about leaving their homes amid the COVID-19 pandemic, many are opting for more contactless shopping experiences. This inaugural report evaluates how retailers—from Target to Nordstrom, and Whole Foods to Walmart—are shifting to a stronger e-commerce business model, while offering consumers safe and healthy means of shopping.

Ipsos conducted a two-pronged study, first surveying 2,000 Americans to understand usage, attitudes, and perceptions of consumers regarding pickup and first-party delivery of products from retailers in the current retail environment, followed by thousands of mystery shops that measured the performance of brands nationwide and regionally on pickup and delivery attributes. Mystery shoppers audited retailers' performances through all phases of the experience, from account creation to ordering to pickup and delivery. Through the consumer portion of the research, Ipsos found the strongest drivers of curbside and in-store pickup were having a designated pickup location, easy online account creation, providing contactless order pickup, and that orders were ready when promised.

"Use of BOPIS and curbside pickup has increased for 78% of shoppers since COVID-19 began, and 69% expect to continue using it at the same or higher levels after the pandemic subsides," said Carlos Aragon, Vice President of U.S. Channel Performance at Ipsos. "As we continue to see the adoption and usage of these new digital offers rise and continue to stick, it is important that brands have the mechanism to ensure they deliver a seamless and safe customer experience for these new users. The Ipsos E-Commerce Experience Report allows retailers to better understand how to cater to customers in an increasingly virtual/touchless world."

Key Findings

The top brands in buy-online-pickup-in-store (BOPIS) in the grocery category were as follows:

1. **Walmart** performed the strongest across all measured attributes. Most notably, Walmart excelled at posting visible signage directing consumers to the grocery pickup area in 86% of locations audited.
2. **Target** performed exceptionally well against the categories surveyed and had grocery orders ready when promised at 98% of visited locations.



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The top brands in curbside pickup in the grocery category were as follows:

1. **Sam's Club** ranked first with a near perfect performance, and notably for providing designated curbside parking at 100% of locations audited.
2. **Kroger** closely followed in the categories customers noted caring about most, and had orders ready when promised at 97% of locations.

The top brands in delivery in the grocery category were as follows:

1. **H-E-B** ranked first in grocery delivery for their 99% accuracy rate on delivery orders.
2. **Whole Foods** closely followed, with a 95% order accuracy rate.
3. **ALDI** performed well across the board, and predominantly excelled at providing delivery notifications on 95% of orders.

Some key callouts from the apparel category:

- **Target** led the pack in the apparel category, and posted clear, visible signage directing consumers to the in-store pickup area at 83% of locations.
- **Nordstrom**, also a strong contender, offered a contactless pickup experience at 65% of locations, making them one of the best in the category for contactless pickup.

Key considerations and opportunities for improvement

As e-commerce offerings expand, brands must continue taking steps to ensure consumers have a positive end-to-end experience. While several retailers have started shifting to meet consumer demand, there is still a tremendous growth opportunity for all brands offering BOPIS, curbside, and delivery. Across the board, customers look for clear communication, but more than a quarter of all pickup and delivery shoppers say there is room for improvement with communication.

- When it comes to brands offering delivery, order accuracy is critical, and 9% of shoppers say their order was not accurate.
- Retailers providing pickup need to denote designated locations and visible signage and make it easy for consumers, but 27% of BOPIS locations were poorly marked or difficult to find.

Ipsos will be conducting Wave 2 of the E-Commerce Experience Report, looking into curbside retail shopping just in time for the holiday season and 3rd party delivery fulfillment for grocery and food and beverage.

For more information on Ipsos' E-Commerce Experience Report, visit [here](#).



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About the Study

As a leading market research and mystery shopping firm, Ipsos launched the E-commerce Experience Report: a mystery shopping study on buy-online-pickup-in-store (BOPIS), curbside, and delivery offerings. The Report measures and ranks the end-to-end BOPIS, Curbside, and 1st party Delivery experiences at major brands across the U.S. and reports on KPIs such as user-experience, likelihood to recommend service, and ease of use. The approach was 2-pronged:

- **Step 1: Consumer Survey and Driver's Analysis**
Leveraging results from a Consumer Survey of 2,000 Americans, Ipsos conducted a Driver Analysis to determine which pickup and delivery attributes are table stakes, which are key differentiators, and which are unimportant.
- **Step 2: Mystery Shopping**
Upon conducting 150 mystery shops per brand (split between BOPIS, curbside, and 1st party delivery), Ipsos measured how well each brand is performing on the KPIs that matter to consumers.

For more information on this news release, please contact:

Carlos Aragon
Vice President, Ipsos
carlos.aragon@ipsos.com

About Ipsos

Ipsos is now the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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360 Park Avenue South, 17th Floor
New York, NY 10010
+1 212-265-3200

Contact: Carlos Aragon
Vice President
Email: carlos.aragon@ipsos.com
Tel:

