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National Study Finds H-E-B, Chipotle Lead Grocery and Restaurant Brands In E-commerce Experience

Wave 3 of Ipsos Study Discovers Regional Brands, like Publix, Outperforming Large Grocery Chains in Buy-Online-Pickup-In Store and Curbside

July 12, 2021 – Today, global research firm, Ipsos, has released the findings of its latest E-Commerce Experience Report, a mystery shopping study ranking nationwide brands on their fulfillment of online orders for pickup. Many consumers remain drawn to the convenience and speed of contactless e-commerce offerings from grocery chains and restaurants. Wave 3 of the report demonstrates how grocers and the food and beverage industry continue to make waves in online order fulfillment and which brands emerge as the frontrunners.

The report showed that 78 percent of Americans have increased their use of in-store and curbside pickup options since the start of the pandemic in 2020. Even as the pandemic subsides, 69 percent of those surveyed said they expect to continue using e-commerce options at the same levels, if not higher.

"As we continue to see the adoption and usage of digital offerings rise, it is critical for brands to ensure a seamless and safe end-to-end e-commerce experience to keep customers coming back," said Carlos Aragon, Vice President of Ipsos Channel Performance. "Knowing which brands are leading the pack – and more importantly, why – is critical to succeeding in the e-commerce economy."

Key Findings

Relying on consumer feedback across 14 grocery chains, Ipsos found the top brands fulfilling online orders through pickup are:

1. **H-E-B** leads among all grocery stores largely due to in-stock availability, ability to schedule pickup times, and good instructions on order pickup. Perfect accuracy, no fees or minimums, and excellent communication help them lead the category.
2. **Publix** comes in a close second to H-E-B due to its ease of ordering and superb communication. In addition, Publix excels in order accuracy and contactless handoffs.
3. **Aldi** also excels in pickup scheduling flexibility, in-stock availability, and order accuracy and overall satisfaction.

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Consumer data around 12 nationwide food and beverage brands determined the following:

1. **Chipotle** ranks best of all food & beverage brands. Their ordering process is simple and easy to use, but their communication is lacking. Chipotle does better than other F&B brands in terms of having easy to find pickup locations, and nearly all Chipotle pickups were in-store.
2. **Panda Express** ranks second among food & beverage brands. As with other brands, the ordering process is easy and Panda's pickups were split between in-store and drive through.
3. Like Chipotle, **Subway's** ordering process is simple and easy to use. Subway shoppers pickup using a combination of in-store and curbside; in-store pickup is very good, but curbside lost points for lack of guidance and parking.

Key considerations and opportunities for improvement

As e-commerce continues to expand across the industries customers care about most, a few common themes emerged around areas where consumers thought retailers could improve, in both the grocery and restaurant sectors:

- *Ease of ordering*: The initial experience of ordering via mobile app or online platform needs to be seamless and intuitive. Ordering portals that were easy to navigate led to higher scores; platforms that weren't user-friendly raised complaints almost without exception.
- *Communication around pickup*: Lack of clarity around how, when, and especially where to pick up an order, was one of the most frequent complaints. Retailers should be conscientious about providing clear, concise instructions for pickups and making sure staff follow them.
- *Timeliness and accuracy of order fulfillment*: These are two of the oldest problems with ordering for pickup, predating even online ordering. Simply put, customers want to be sure they're getting what they ordered, and they don't want to wait a long time for their order.

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About the Study

Leveraging results from our Consumer Survey of 2,000 Americans, our Drivers Analysis determined which pickup attributes are table stakes, which are key differentiators, and which are unimportant. Then, using data from 100 mystery shops per brand, we measured how well major brands across the US are performing on five key performance indicators (KPIs):

- User experiences of brands' online and/or mobile ordering platforms
- Accuracy of orders and standards of product quality
- How wait times were impacted by order volumes
- Whether pickup instructions were followed by associates
- Availability of menu items and inclusion in online orders

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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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The publication of these findings abides by local rules and regulations.

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