

E-COMMERCE 2020

**What brands can do to deliver
on their brand promise beyond
the in-store experience, and win
at Pickup and Delivery.**

9/14/2020

E-Commerce Syndicated study

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GAME CHANGERS



Welcome to our webinar!

Today's presenters will guide you through recent e-commerce trends and best practices in pickup and delivery offerings



Carlos Aragon

Vice President

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Carlos has been with Ipsos since 2012, managing adhoc and tracking programs in channel performance, customer experience, and brand health for clients in the technology, telecom, financial services, retail, and automotive sectors.

He has been leading Ipsos' efforts to develop an in-store/curbside pickup framework and has a strong passion for identifying the "so what" behind the "what."

Carlos holds an MBA from Washington State University and a BA from the University of Washington.



Kaili Hunsaker

Senior Account Manager

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Kaili has been with Ipsos since 2016, leading custom programs and global mystery shopping programs in the retail, telecom and technology sectors.

She has a background in custom global tracking programs measuring customer experience, and enjoys the complexities of executing programs across markets to help brands shape their marketing and operational strategies.

Kaili has a BA in Psychology and Sociology and an MA in Social and Sustainable Management, both from Seattle Pacific University.

Three things you will learn today

01.

**Opportunities
and challenges
due to growth in
e-Commerce**



02.

**Solutions,
benchmarking,
and ranking
retailer
performance**



03.

**Findings from e-
Commerce
Consumer Study**

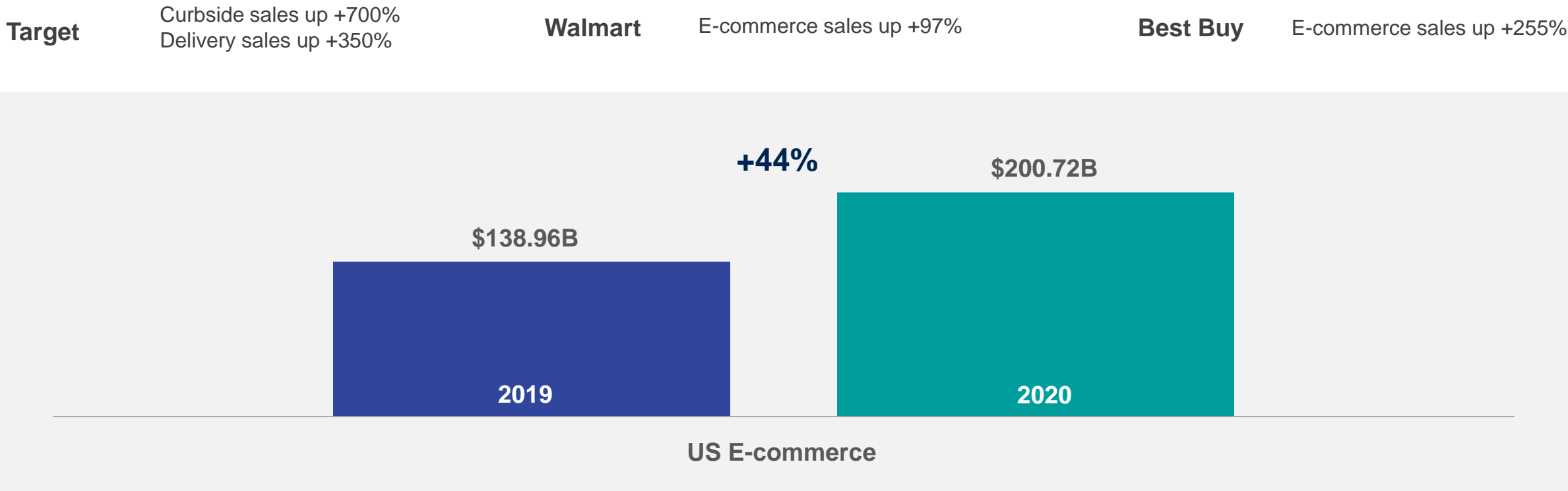


Opportunities and challenges due to growth in e-Commerce

1

Online retail sales are up 44% over the year in the wake of the COVID-19 pandemic

An estimated **\$1 out of every \$5** spent April – June came from orders placed online



Source: US Department of Commerce, August 2020, CNBC, TechCrunch

In 2020, Americans are:

For many brands, rollout of new pickup and delivery services has been quick. How do you ensure you're providing the level of service your customers expect?



Settling into new routines, having to fit a new reality



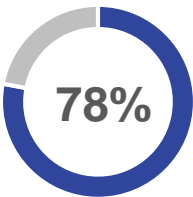
Spending more time online, trying new apps and services



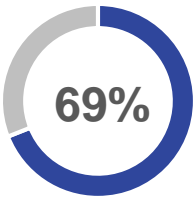
E-commerce is sticky

BOPIS / Curbside Pickup

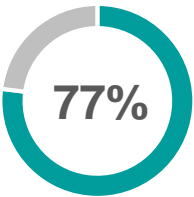
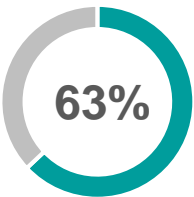
Increased usage since COVID began



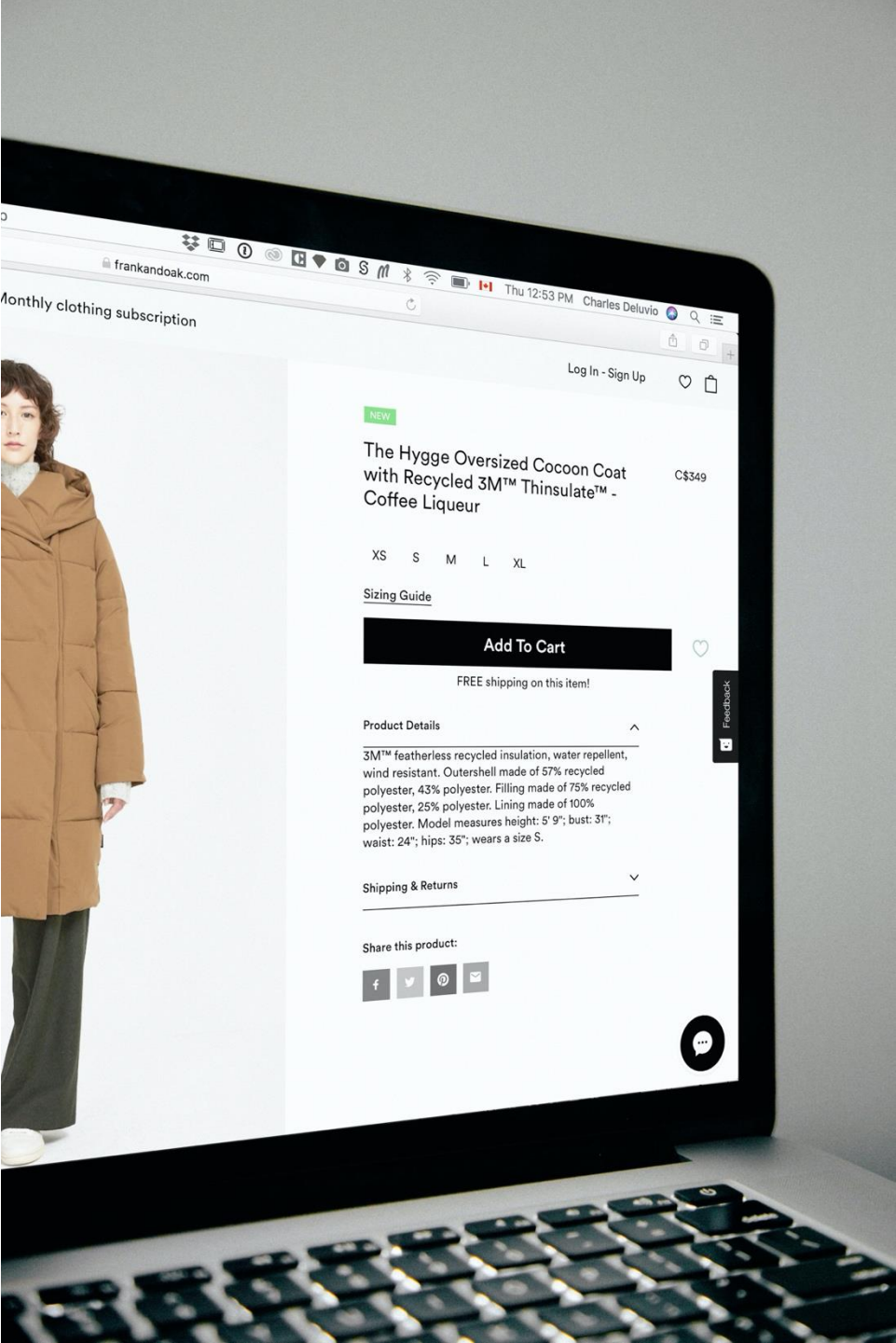
Expect to continue or increase use after COVID subsides



Delivery



Source: E-commerce Consumer Study, August 2020



E-Commerce is everywhere

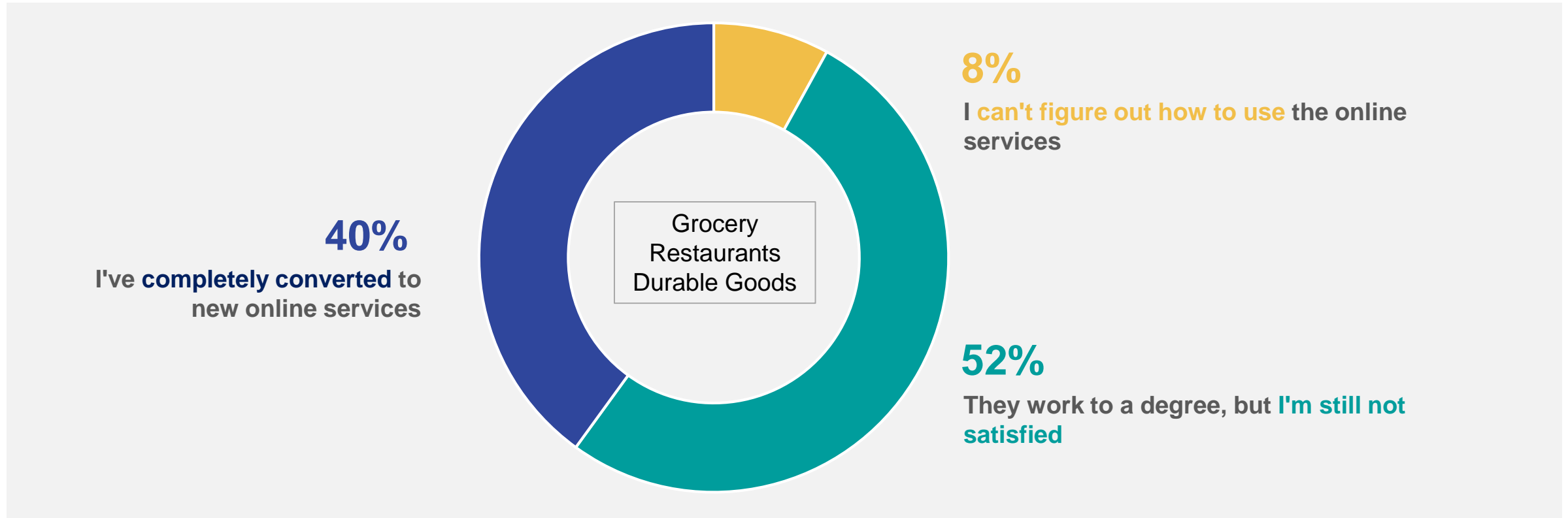
Over 220 million Americans ages 14+ will make an online purchase in 2020

For many, pickup services will be a new experience



Challenges facing e-Commerce

Online services



Source: Ipsos Poll July 22

Question:



Which retailers are meeting or exceeding consumer E-commerce expectations?

Solutions, benchmarking, and ranking retailer performance

2

IPSOS' 2020 E-COMMERCE EXPERIENCE REPORT

A syndicated mystery shopping study on
in-store pickup, curbside, and delivery offerings in a 6-foot economy

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Program Overview



Consumer Survey & Drivers Analysis

Identify the attributes that will drive consumers to shop at a retailer again



Mystery Shopping

BOPIS, Curbside, & Delivery Mystery Shops that measure the **end-to-end pickup / delivery journey** – from placing the online order, through the actual pickup / delivery – across major brands nationwide.



Ranking & Reporting

The report will rank brands across all key measurement areas and report on KPIs such as user-experience, likelihood to recommend service, and ease of use.

Completed

In Process

Coming Soon

APPAREL

 lululemon
NORDSTROM



 OLD NAVY
KOHLS

HEALTH & BEAUTY

 ULTA
BEAUTY

SEPHORA

C-STORES



 Wawa

 CIRCLE K

 QT
QuikTrip

RESTAURANTS



GROCERY

 Albertsons

 GIANT
EAGLE



 Wegmans

 STOP & SHOP



 weis

 GIANT

sam's club 

 ShopRite

 Roche Bros

 WHOLE
FOODS
MARKET

 Kroger

Walmart 

 meijer

 H-E-B

 HyVee
EMPLOYEE OWNED

 FOOD LION

 shaw's
star
market

BIG BOX

 BEST
BUY



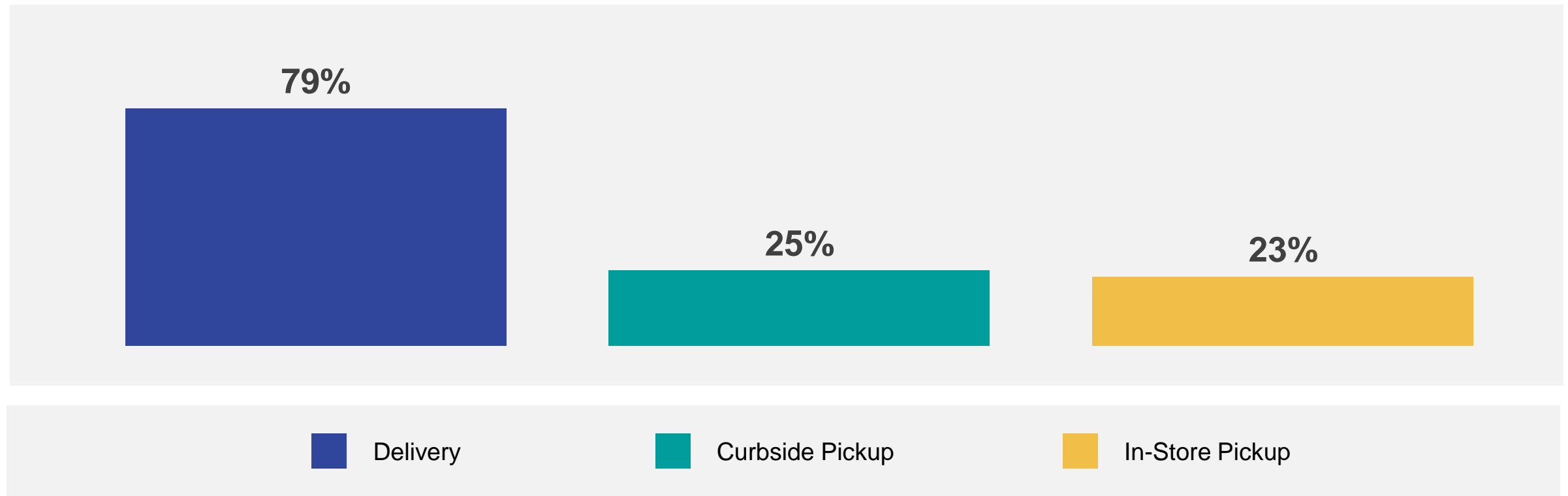
 DICK'S
SPORTING GOODS

Findings from the e-Commerce Consumer Study

3

As customers move toward online ordering, brands must optimize and adapt their E-commerce experience to win in the new shopping arena beyond brick and mortar

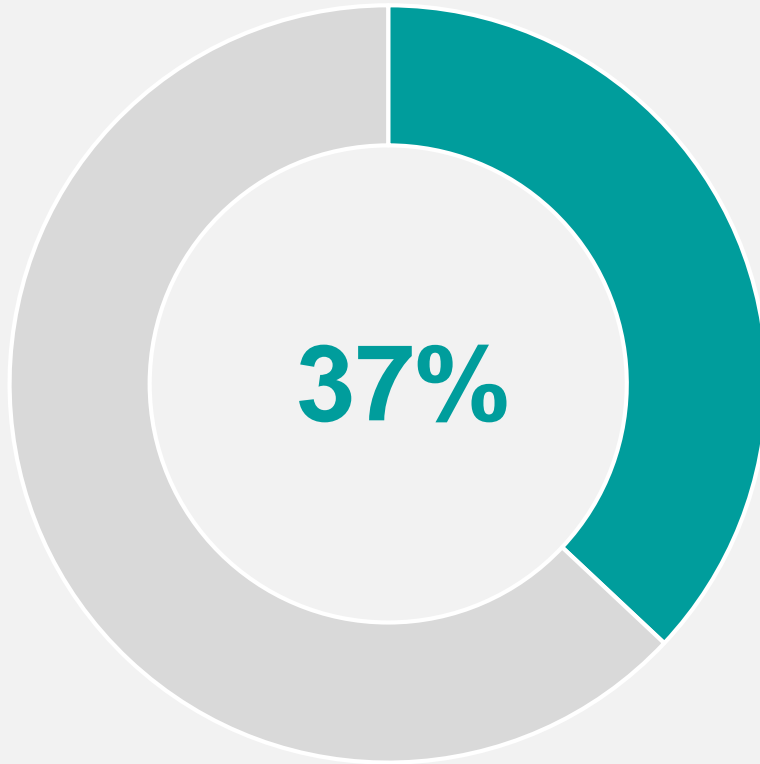
Past 90 days:



Source: E-commerce Consumer Study, August 2020

In-Store/Curbside Pickup

Past 90 days:



39% Big Box Stores (Ex. Target, Walmart)

24% Fast Food (Ex. McDonald's)

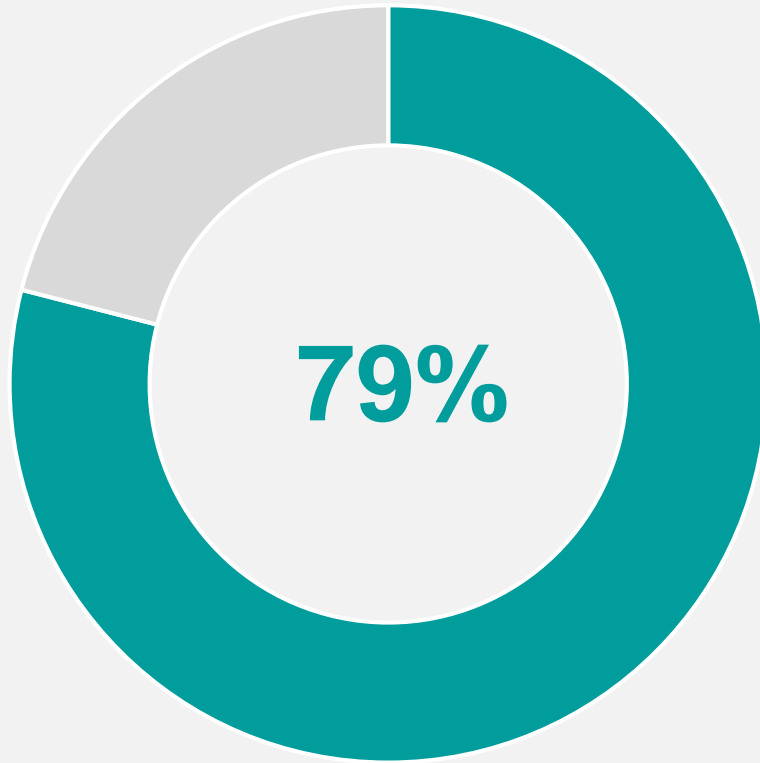
24% Home Improvement Stores

24% Grocery Store / Supermarket

Source: E-commerce Consumer Study, August 2020

Delivery

Past 90 days:



73% Online retailer (Ex. Amazon)

28% Big Box Stores (Ex. Target, Walmart)

17% Fast Food (Ex. McDonald's)

16% Department Store (Ex. Nordstrom)

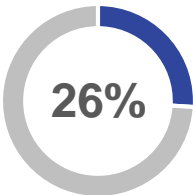
15% Grocery Store / Supermarket

Source: E-commerce Consumer Study, August 2020

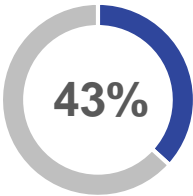
Tapping into impulse buying will be important

BOPIS / Curbside Pickup

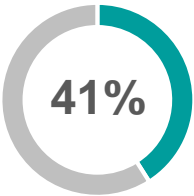
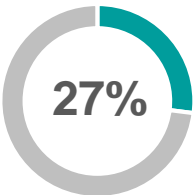
First-time users



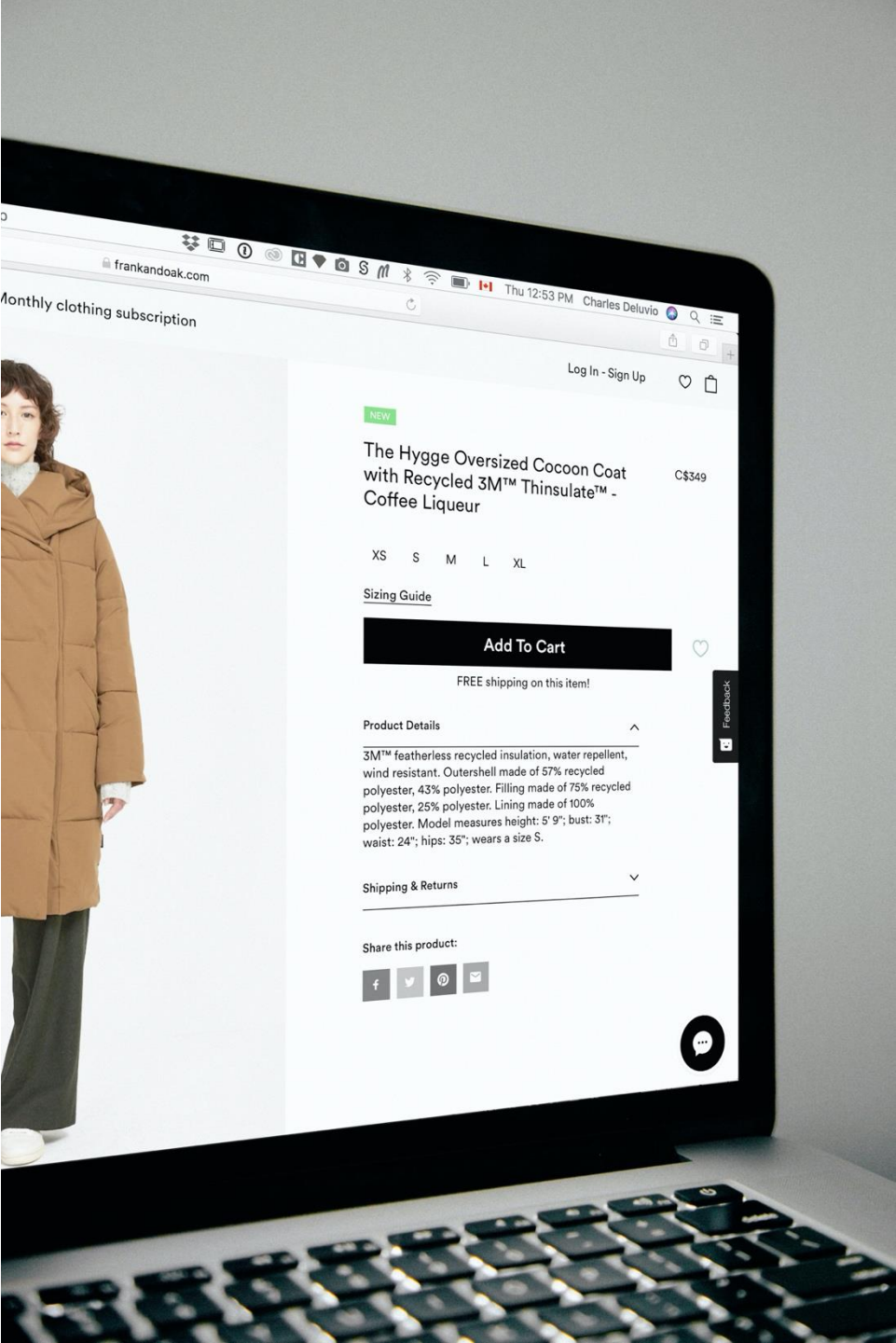
Make unplanned purchases



Delivery



Source: E-commerce Consumer Study, August 2020



Efficiency and safety drive initial retailer choice

How do consumers choose E-commerce Retailers?

BOPIS / Curbside Pickup	Delivery
Saving time	Saving time
No COVID-19 exposure	No COVID-19 exposure
Efficient way to shop	Efficient way to shop
Convenient locations	Easy to create order
Same-day pickup	Best prices














But what keeps them coming back?

Source: E-commerce Consumer Study, August 2020


















Key Drivers of Pickup & Delivery

We measured importance of 35+ pickup & delivery attributes

Delivery

1. It was easy to create an account 
2. Order shipment text / email confirmation 
3. Time estimate for delivery 
4. Option to select a delivery window 
5. Clear which items are available for delivery 
6. Minimum order amount 
7. Cost of delivery 
8. Substitutions →←
9. It was clear that delivery was available 
10. Ease of building an order / cart 
11. Order accuracy 
12. Delivery within a scheduled window 
13. Notification of delivery 
14. Ability to specify where to leave the delivery 
15. Customer service phone line 
16. COVID-19 health & safety precautions 
17. Delivery vehicle branding 

BOPIS / Curbside Pickup

1. It was easy to create an account 
2. Order pickup text / email confirmation 
3. Time estimate for pickup 
4. Option to select a pickup window 
5. Clear which items are available for pickup 
6. Item in stock at desired location 
7. Easy instructions for picking up the order 
8. No extra charge for pickup 
9. Substitutions →←
10. It was clear pickup was available 
11. Ease of building an order / cart 
12. Order accuracy 
13. Wait time for pickup 
14. Easy check-in after arrival 
15. Clear signage for in-store / curbside pickup 
16. Order ready when expected 
17. Contactless order pickup / placed in trunk 
18. COVID-19 health & safety precautions 

We conducted a driver analysis on 3 dependent variables

01.



**Likelihood to
shop again**

02.



**Likelihood to
recommend**

03.



**Company
trust**

Not all attributes are created equal

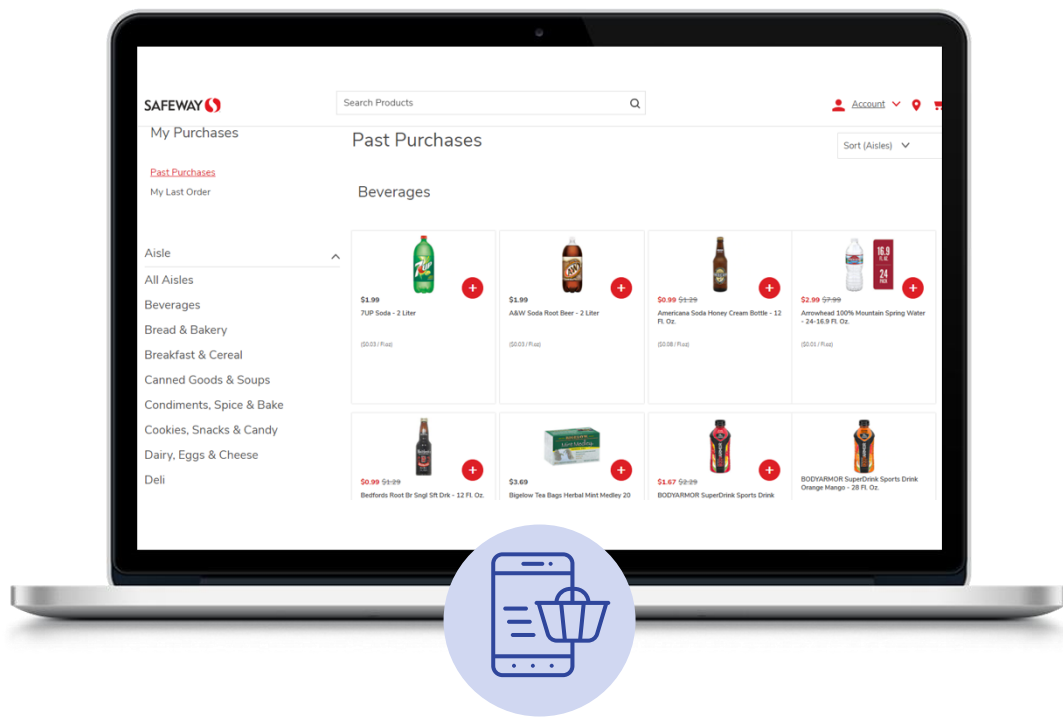
There is a clear distinction in impact on likelihood to shop again.



Curbside & in-store pickup



Making Pickup Easy is Fundamental



Easy to build order

CURBSIDE PICKUP

HOW DOES IT WORK?

- 1 ORDER ON THE BK® APP OR BK.COM**
- 2 SELECT CURBSIDE PICKUP**
- 3 WHEN YOU ARRIVE AT THE RESTAURANT, PARK IN ONE OF THE DESIGNATED PARKING SPOTS, PRESS "I'M HERE" ON THE BK® APP AND OUR TEAM MEMBERS WILL BRING YOU YOUR FOOD.**

Curbside pickup available at participating locations. See BK® App and BK.com.



Clearly Communicate How & Where to Pick Up



Get the Order Right

To Differentiate your Pickup offer, exceed consumer expectations for timeliness and communication



Pickup signage

Field & Stream stores are temporarily closed.
However, select DICK'S Sporting Goods stores are offering Contactless Curbside Pickup.

FREE. FAST. EASY AS 1-2-3!
**CONTACTLESS
CURBSIDE PICKUP**

- 1

Buy online at
dickssportinggoods.com.
- 2

Look for an email and
drive to the store.
- 3

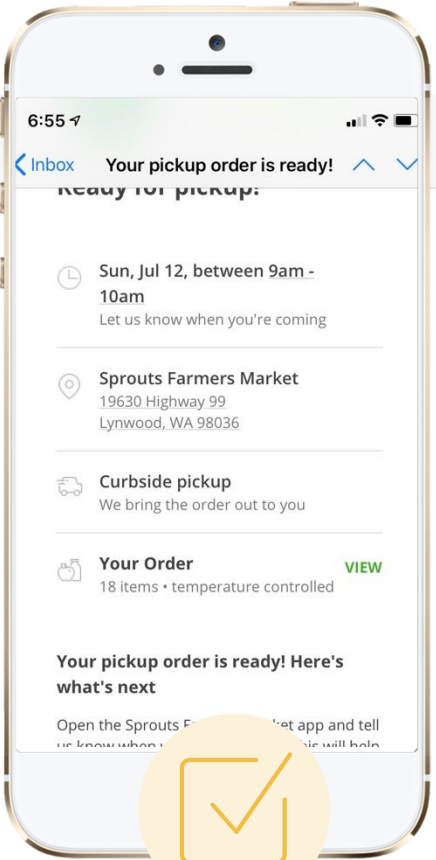
Check in and stay
in your vehicle.

LEARN MORE

Subject to product availability. Exceptions apply.



Contactless pickup



Order ready when promised

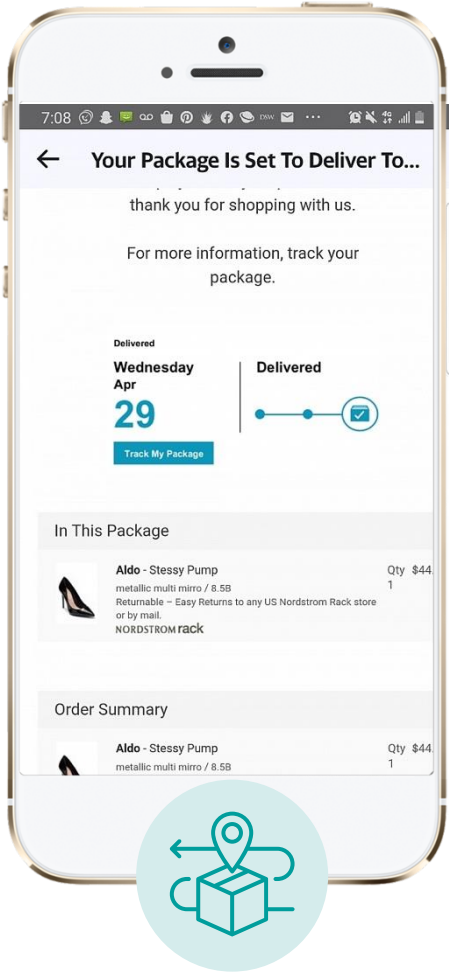
Home Delivery



Notifying consumers and delivering when promised is expected in delivery



Delivered on time



Shipping notification

To differentiate your delivery offering, get the order right, ideally with a contactless delivery

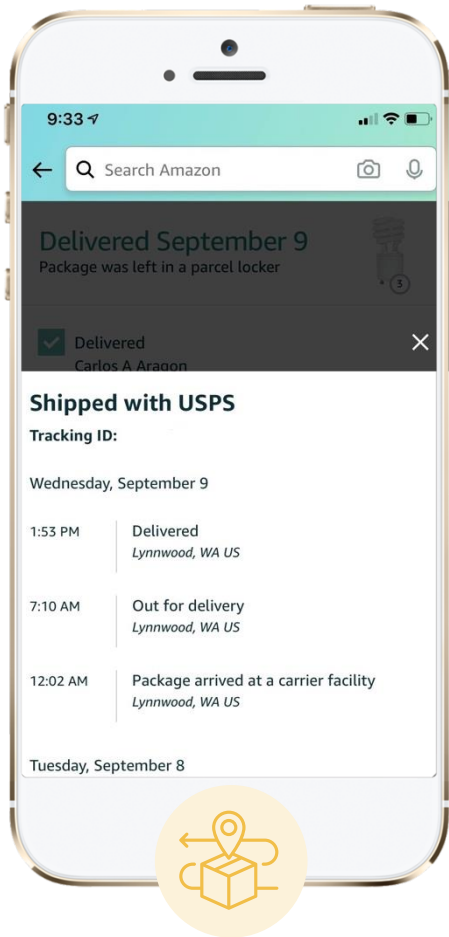


Get the order right



Contactless delivery

Delivery notification, and delivering in a clearly marked delivery vehicle, are also important.

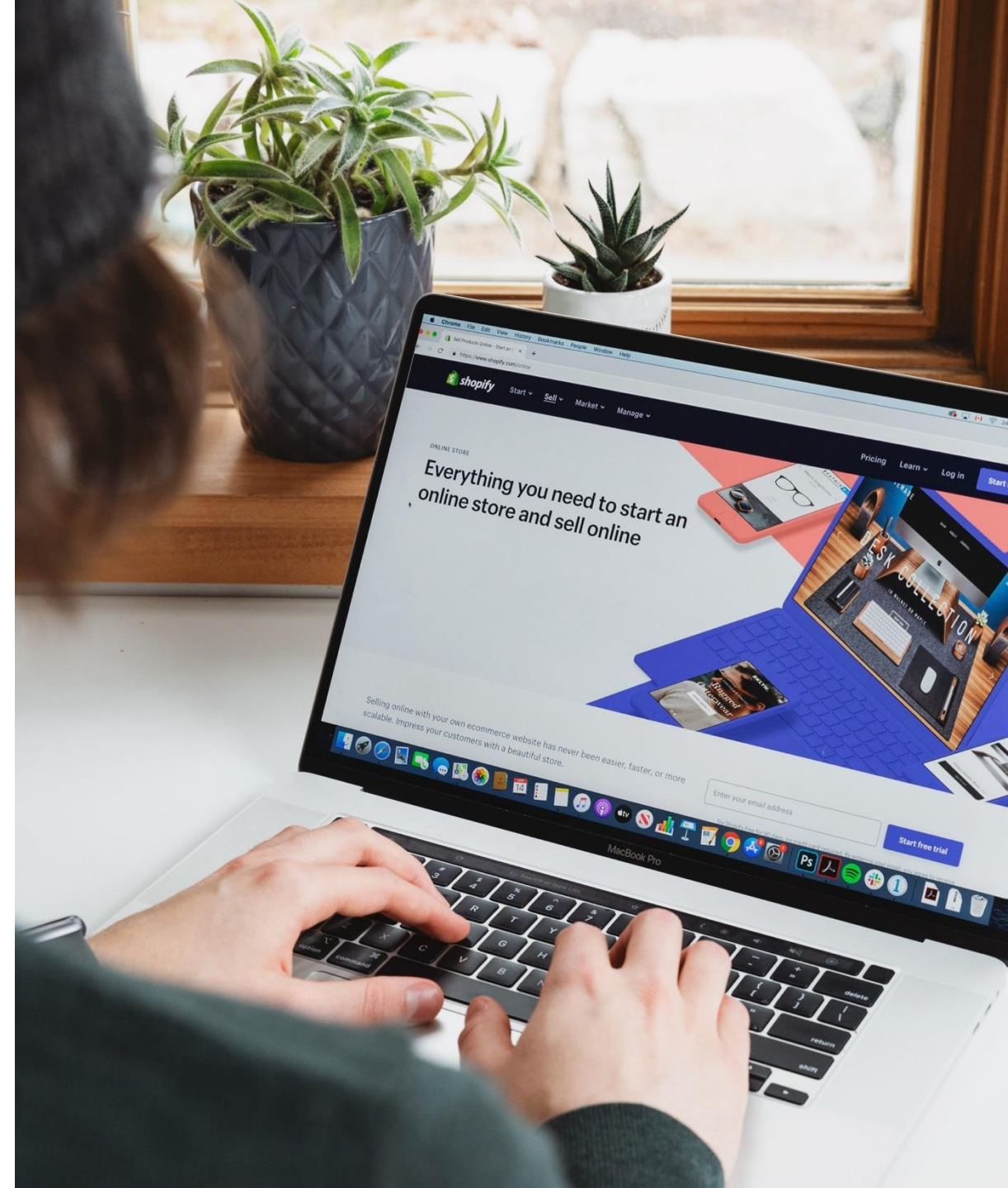


Delivery notification



Clearly marked delivery vehicle

The shift towards E-commerce is not new, but the magnitude in the wake of COVID-19 is unprecedented, and brands must act fast to ensure they retain customers in an arena that is more important than ever





Final Takeaways

- 1** | Fulfillment is critical; shoppers will not forgive repeated errors
- 2** | Make ordering simple and easy to repeat
- 3** | Consumer preference is quickly evolving, be ready to pivot and adapt rapidly

IPSOS' 2020 E-COMMERCE EXPERIENCE REPORT

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RESTAURANTS



GROCERY

 Albertsons

 GIANT
EAGLE



Wegmans

 STOP & SHOP



weis

GIANT.

sam's club 

 Roche Bros

**WHOLE
FOODS**
MARKET

Kroger

Walmart 

meijer

H-E-B

HyVee
EMPLOYEE OWNED



shaw's
star
market 

BIG BOX

**BEST
BUY** 



DICK'S
SPORTING GOODS 



Want to learn more?

Contact us to learn more about the study and how Ipsos can help your brand succeed in the 6-foot economy.



Carlos Aragon

Vice President, Channel Performance
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About Ipsos

Ipsos is 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 – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.

**BE
SURE.
ACT
SMARTER.**

