

FIELD AGENT[®] PRESENTS

INSIDE OGP



BONUS SECTION: OGP AND THE CORONAVIRUS

INSIGHTS INTO 7 PRESSING QUESTIONS
ABOUT ONLINE GROCERY PICKUP

It's Time to Pick Things Up

It has become crystal clear:

Online grocery pickup (OGP) is here to stay.

In a February 2020 Field Agent survey, 64% of respondents said they have used OGP at some point in the past. Moreover, among those who've used the service, 47% said they use it at least once a month on average.

A more recent survey conducted on April 13, 2020 sheds light on OGP in the wake of the coronavirus pandemic. Among shoppers who were using OGP prior to the crisis, 36% said they're using OGP more since the outbreak, compared to 26% who are using it less.

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But despite its growing popularity among shoppers and retailers, OGP remains a little mysterious. At Field Agent, we regularly hear questions about the who, what, when, where, and why of OGP.

Let's just say it's a buzzing topic. And the buzz is only growing louder.

This report takes you inside the OGP phenomenon to answer several pressing questions about OGP users and services.

Based on mystery shops/audits of 84 pickup operations across the country, spanning four major OGP retailers (Amazon/Whole Foods, Kroger, Target, Walmart), this report offers a timely and data-driven look at the inner-workings of OGP.

So let's pick things up a little, and really get to know OGP.

After all, OGP is here to stay.

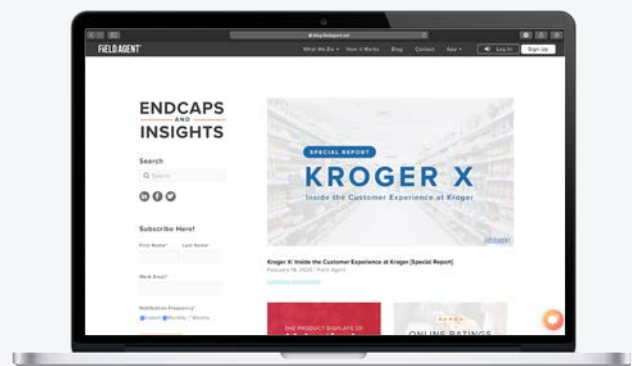


Agent Photo

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What Field Agent Did

Just prior to the wide-scale outbreak of COVID-19 in the United States, the Field Agent on-demand platform enlisted 84 agents to shop for and purchase groceries/household consumables online through one of four retailers: Amazon/Whole Foods, Kroger, Target, and Walmart. All mystery shops and audits were conducted January 4-19, 2020.

Study Locations



📍 Amazon/Whole Foods 📍 Kroger 📍 Target 📍 Walmart

Agents opted to receive their orders via *curbside* pickup.

In all, 21 agents mystery shopped *each* of the four retailers. The map shows the locations.

Throughout the process, Field Agent posed questions, collected photos, and, in general, collected data to help us understand the ins-and-outs of OGP services.

Additionally, Field Agent surveyed 1,646 shoppers on February 6, 2020 about their OGP behaviors and attitudes, to help us construct a more comprehensive view of what's happening in OGP. More recently, on April 13, 2020, Field Agent surveyed 1,700 shoppers to understand the impact of the coronavirus crisis on OGP use.

All participants and respondents were U.S. adults at least 18 years of age.

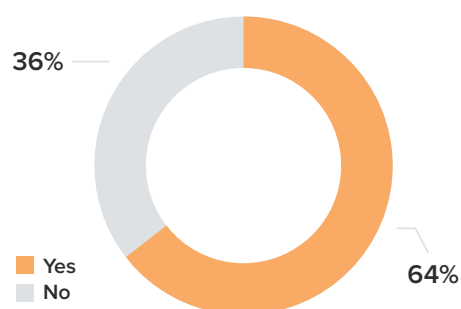




OGP Snapshot

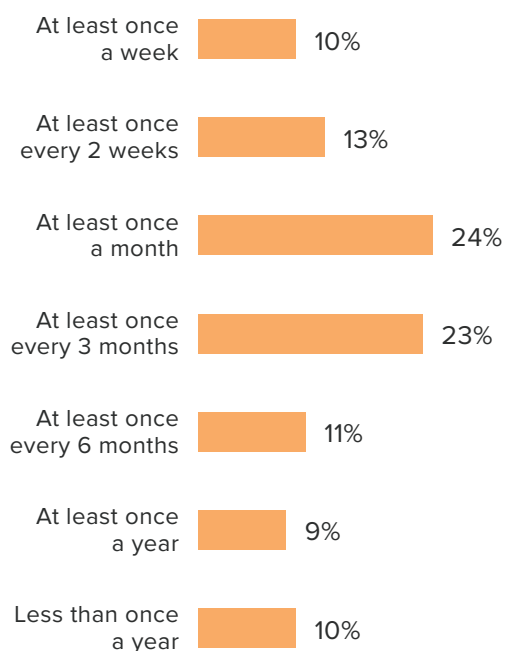
The insights on this page and the next are based on a Field Agent mobile survey of 1,646 U.S. adults, February 6, 2020, just prior to the U.S. coronavirus outbreak.

Have you ever used OGP?



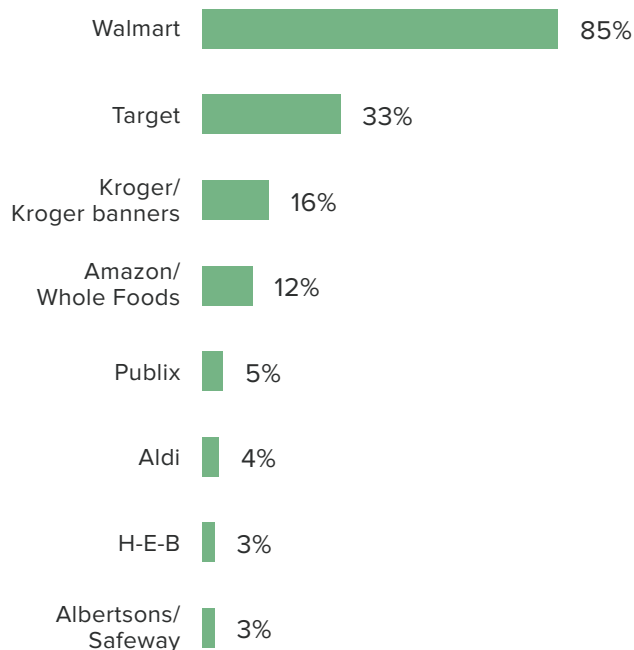
How often do you use OGP?

Among shoppers who have used OGP (n = 1,061)



Which retailers do you use for OGP?

Among shoppers who have used OGP (n = 1,061)

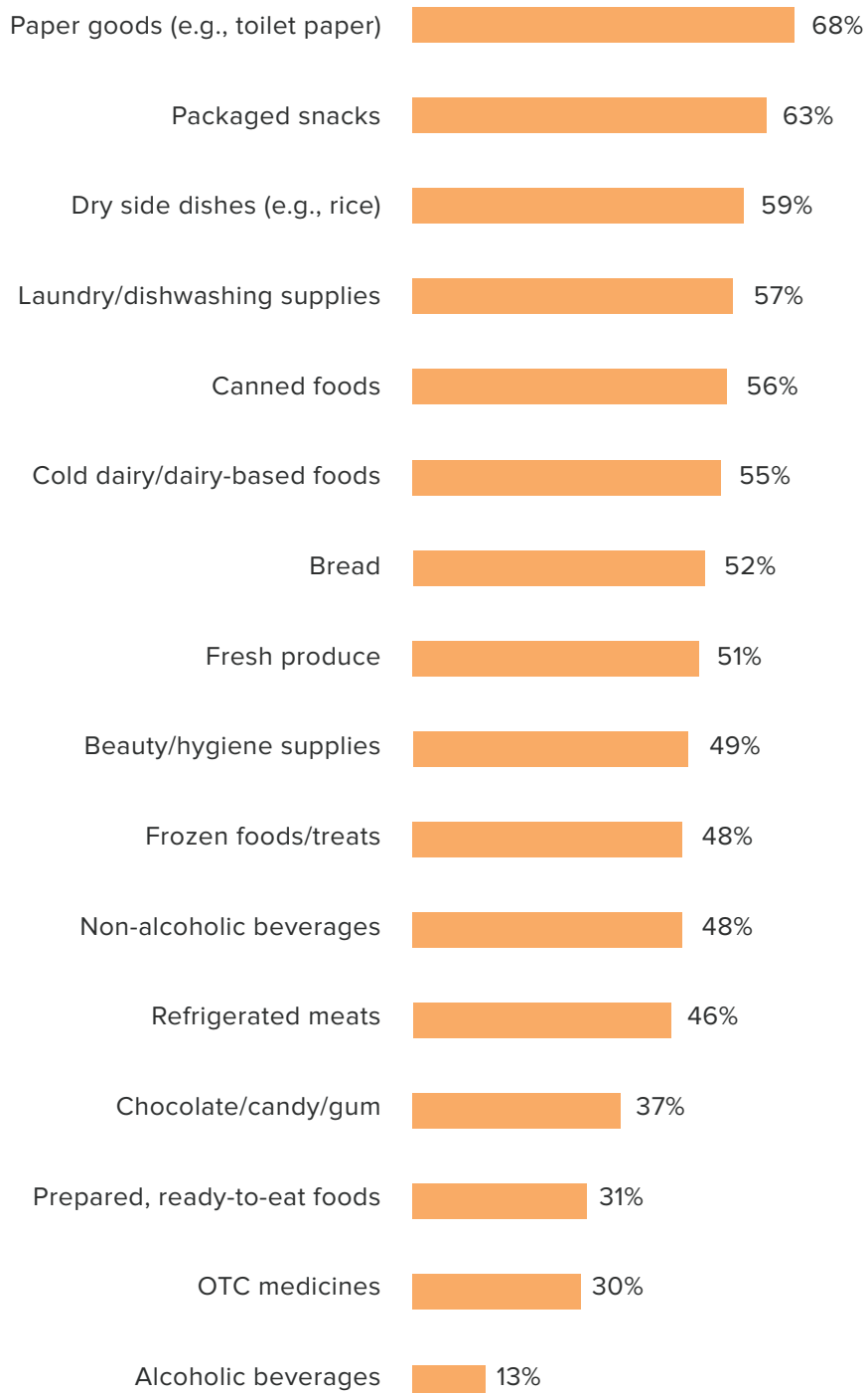




Which products do you buy through OGP?

Among shoppers who have used OGP (n = 1,061)

Displaying a selection of categories



OGP & The Coronavirus

The insights on the next three pages were derived from a Field Agent mobile survey of 1,700 U.S. adults conducted April 13, 2020, several weeks into the U.S. coronavirus crisis.

46% of respondents (n = 1,700) said they have used OGP within the last 3 months

16% of respondents **started** using OGP within the last 3 months

Insight: About half of 1,700 respondents said they have used OGP within the last three months, a period that generally coincides with the U.S. coronavirus outbreak. 16% said they started using OGP within the past three months. But how many began using the service specifically because of the pandemic?

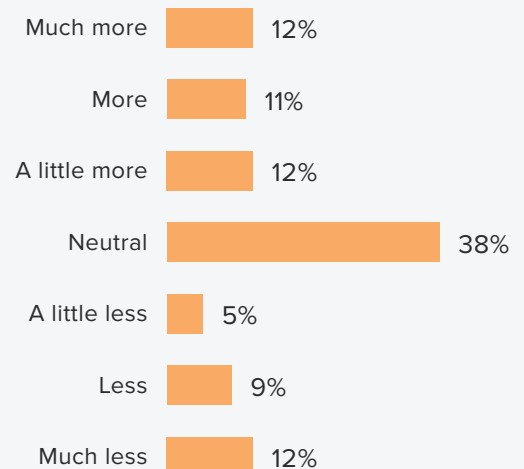
7% of respondents (n = 1,700) who said they started using OGP **specifically because of the coronavirus pandemic**

Insight: Maybe 16% say they started using OGP in the last 3 months, but, of these 273 respondents, just around half reported it was specifically due to the coronavirus outbreak.



Are you using OGP more or less since the coronavirus outbreak?

Among shoppers who were using OGP prior to the U.S. coronavirus outbreak (n = 795)



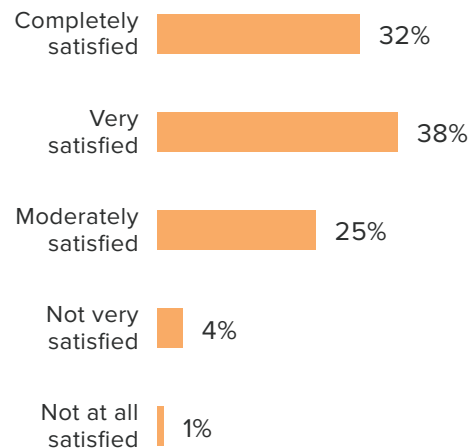
Insight: Of shoppers who were using OGP prior to the pandemic, 36% are using the service more since the outbreak and 26% are using it less.



Insight: Both quantitative and qualitative data from this survey suggest **out-of-stocks** and **limited availability of pickup times**, in particular, have been problems for OGP retailers slammed with orders from customers. Results suggest these are the two primary reasons some users have scaled back their OGP use, even as others have increased it.

How satisfied have you been with your OGP experiences over the last 3 months?

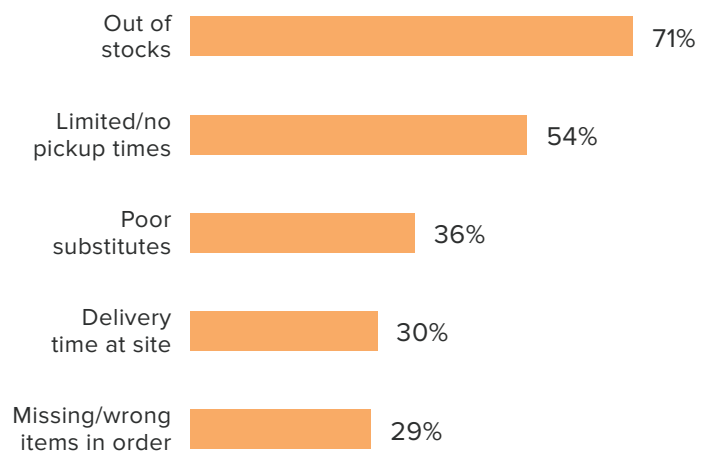
Among shoppers who have used OGP in the last 3 months (n = 779)



Insight: Among shoppers who have used OGP in the last 3 months, with concerns about the coronavirus circulating for much of that time, 30% said they were no more than moderately satisfied with their OGP experiences.

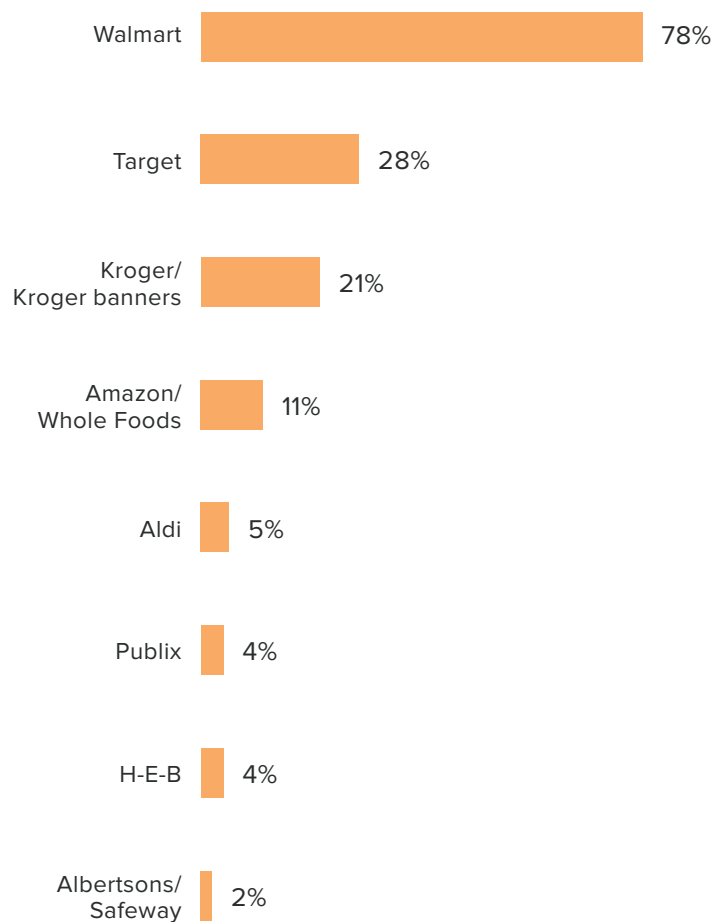
Why haven't you been more satisfied with your OGP experiences the last 3 months?

Among shoppers no more than moderately satisfied with their OGP experiences in the last 3 months (n = 235)



Which retailers' OGP services have you used in the past 3 months?

Among shoppers who have used OGP in the last 3 months (n = 779)



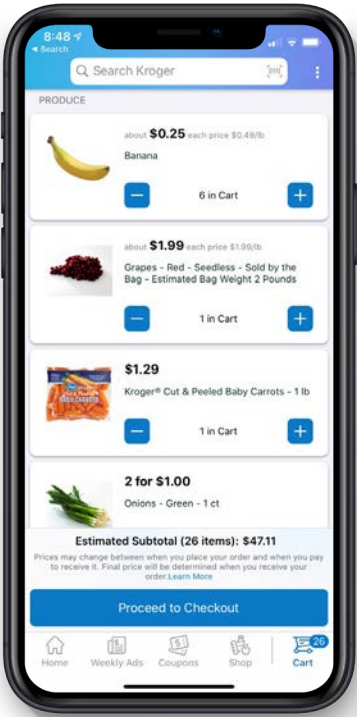
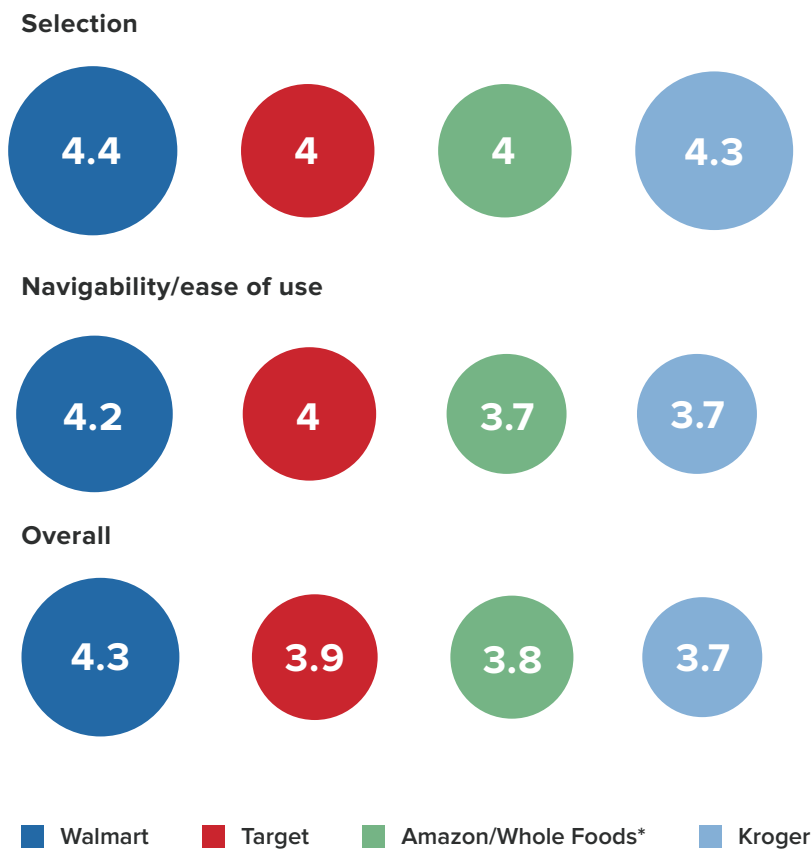
Insight: Here's the retailer-by-retailer breakdown. Of users who've used OGP in the last three months, Walmart is by far the top OGP destination, followed by Target and Kroger.



Q1. What do OGP users think about the online shopping experience?

Following the online grocery shopping portion of the study, Field Agent asked all 84 participants (21 per retailer) to rate a few dimensions of their online experience. We then asked these agents several questions about the online shopping experience. Agents were permitted to use either the retailer’s website or app. Agents were required to purchase \$35 worth of groceries/household consumables from Kroger or Amazon/Whole Foods, \$30 from Walmart, or \$20 from Target. At all retailers but Target, agents were required to purchase at least three items of fresh produce.

Where 5 is "excellent" and 1 is "poor," rate your online grocery shopping experience along the following dimensions.

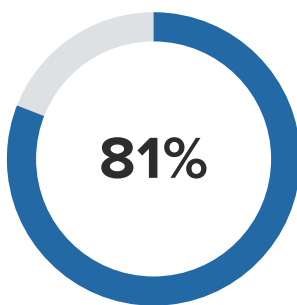


Agent Screenshot

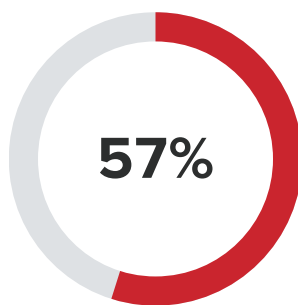
*Used Prime Now app/website



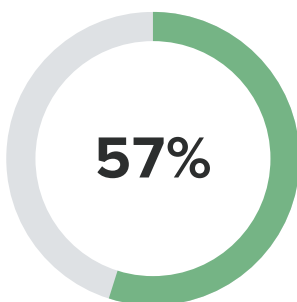
% of OGP users who said shopping online for groceries/
household consumables was **EASIER** than expected



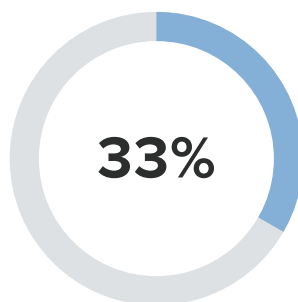
Walmart



Target



Amazon/Whole Foods*



Kroger

**Used Prime Now app/website*

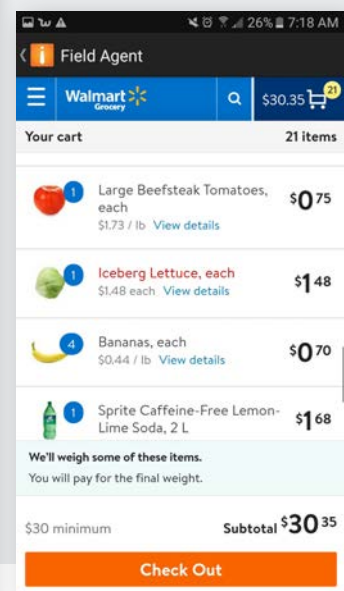
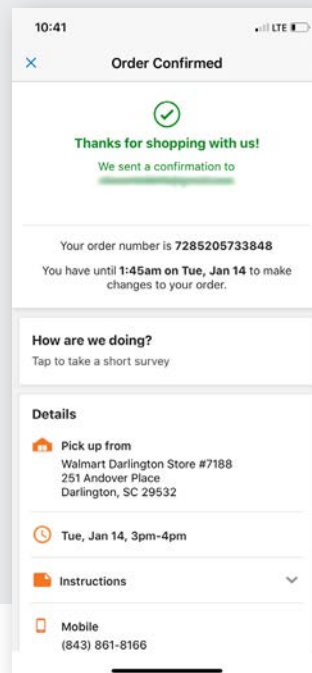
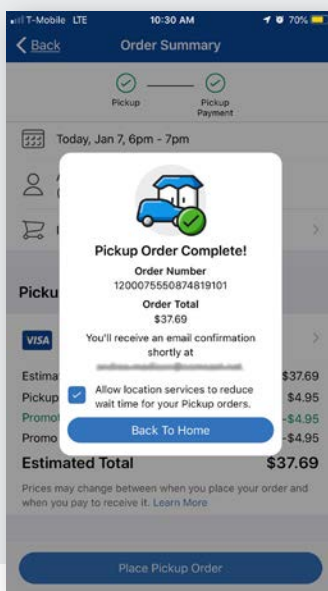
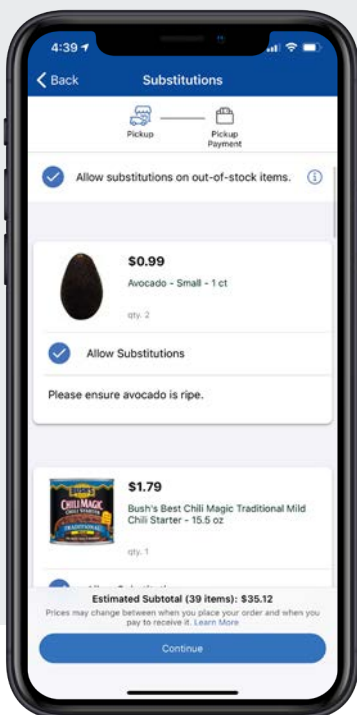
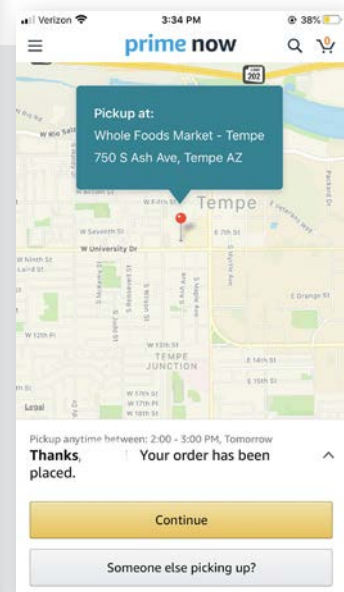
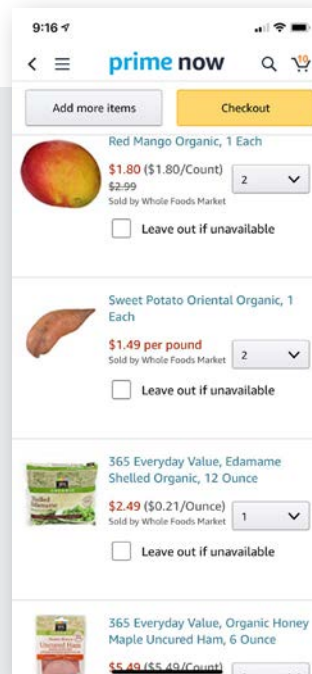
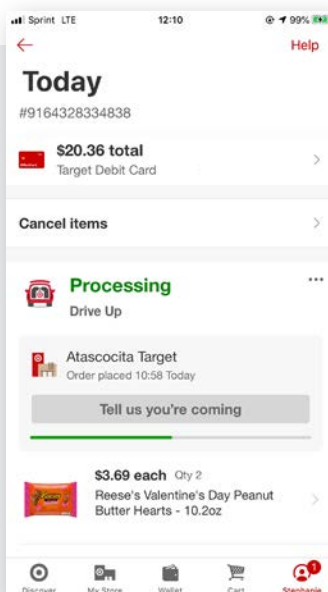
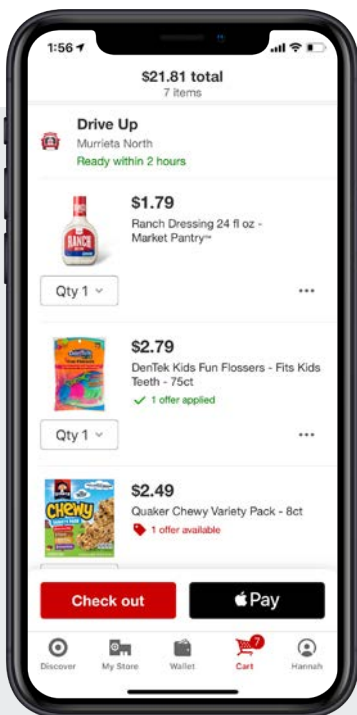


Special Report: Kroger X

Explore the customer experience at Kroger

Download now →

In Photos: OGP Online



Screenshots by our agents

Drive OGP Sales

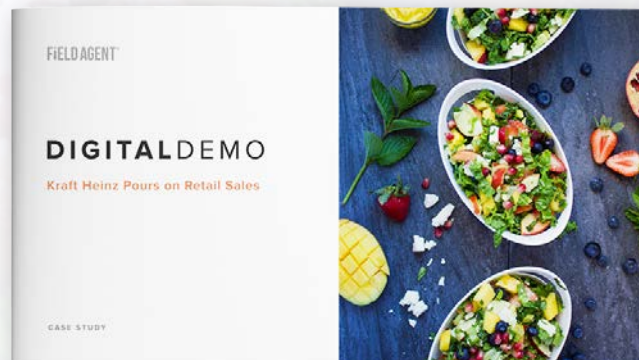
How do brands drive sales when shoppers are increasingly bypassing stores?

Meet the answer.

Digital Demos by Field Agent mobilize real shoppers to purchase a product online (or in stores), try the product at home, and then answer questions about their product experience. The answers then become the basis for winsome, high-quality content online.

Digital Demos even track repurchase of the product.

Digital Demo by FIELD AGENT[®]



[Download the Case Study](#)

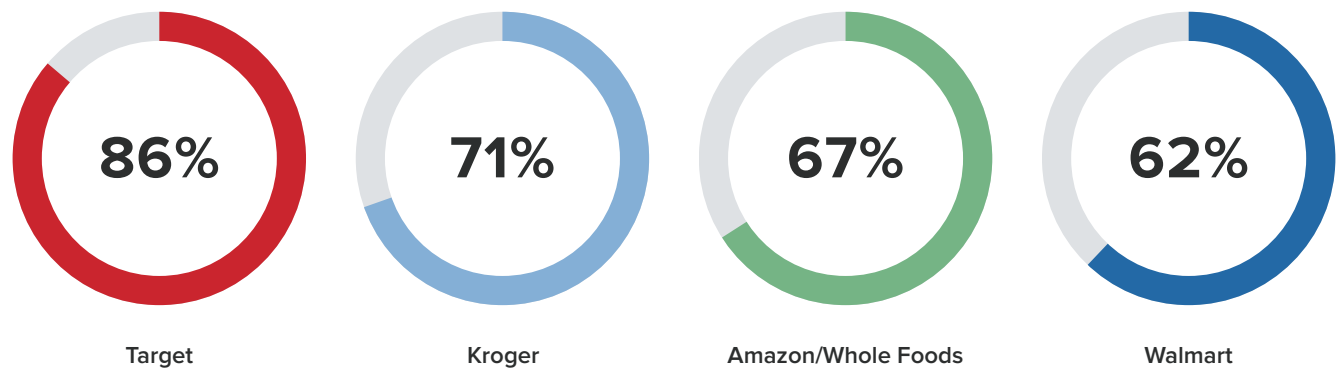
Q2. How fast are OGP deliveries?

All agents opted for curbside pickup. After checking in at the pickup site, agents started a timer inside the Field Agent app. Agents were instructed to stop the timer the moment their groceries arrived at their vehicle. Below we display the results across all four retailers. It's important to note, *Target does not currently offer fresh or frozen groceries through its pickup service*, which probably influences how long it takes to make curbside deliveries.

Average wait time for curbside-pickup deliveries



% of OGP users who said their order was delivered to their vehicle FASTER than expected



*Target does not currently offer fresh or frozen groceries through its pickup service
**Whole Foods filled orders made through Prime Now



Agent Photo

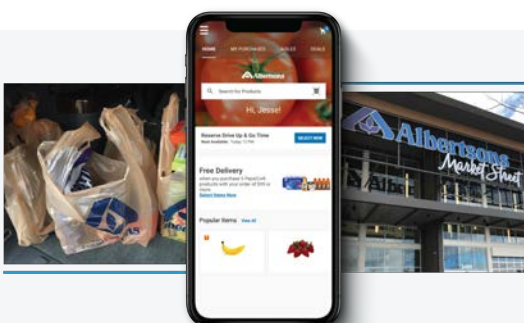
Q3. What do OGP users think about pickup sites and personnel?

"The process was so easy and smooth! The friendliness and help of the associate was greatly appreciated as well."

- Kroger OGP user

After visiting their designated retailer's pickup site, Field Agent asked agents to rate various dimensions of the pickup experience. Ratings were captured on a five-point scale, with 5 "excellent" and 1 "poor."

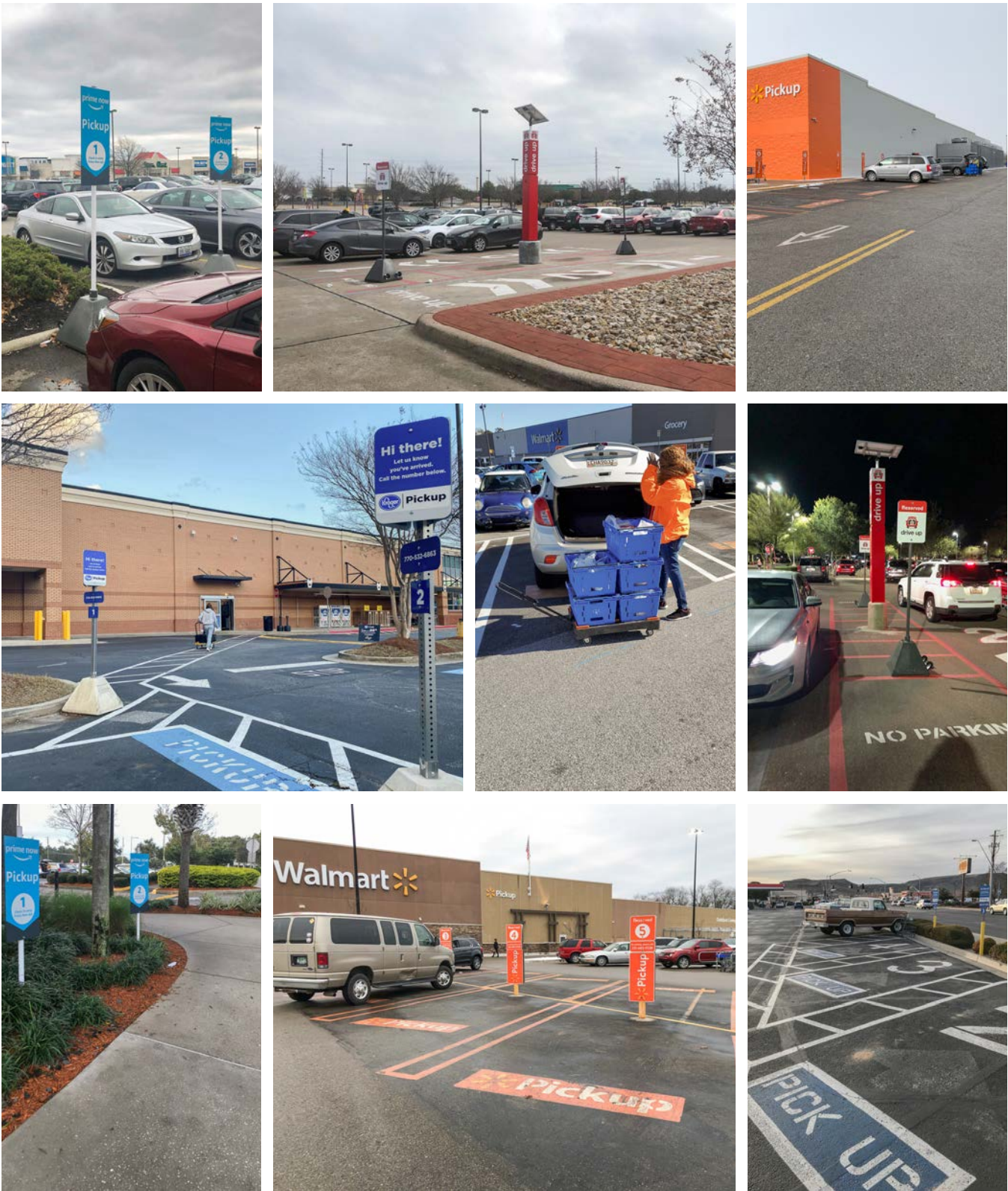
	Walmart	Target	Kroger	Amazon/ Whole Foods	Average
Site navigation	4.9	4.4	4.8	4.0	4.5
Site cleanliness/upkeep	4.7	4.8	4.9	4.5	4.7
Personnel friendliness	4.8	4.9	4.7	4.7	4.8
Personnel competence/know-how	4.9	4.9	4.8	4.5	4.8
Personnel appearance	4.9	4.9	4.9	4.8	4.9



Take a tour of digital developments at **Albertsons**

See for yourself →

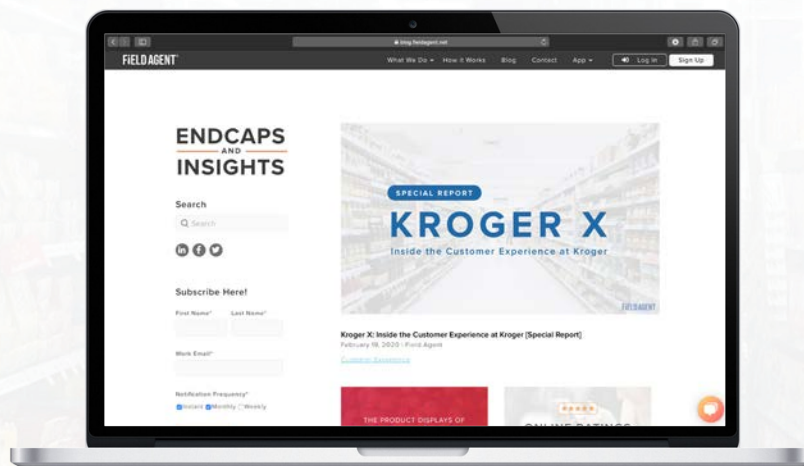
In Photos: Pickup Sites



Photos by our agents

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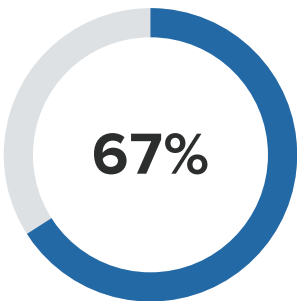
Q4. Are OGP users happy with the quality of their fresh produce?

Except for Target shoppers, all agents were required to purchase at least three items of fresh produce from their respective retailers. Target does not currently sell fresh produce through its pickup service. After returning home with their orders, agents were asked to carefully inspect the freshness of their produce.

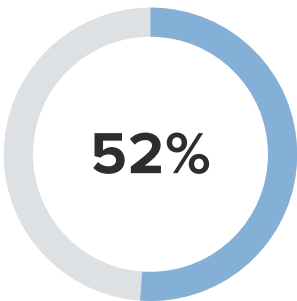
Rate the freshness of your produce, where 5 is "excellent" and 1 is "poor"



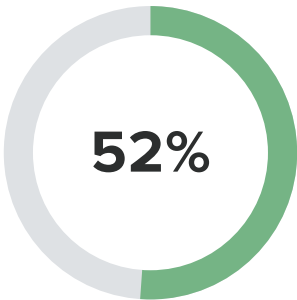
% of OGP users who said their produce was **FRESHER** than expected



Walmart



Kroger



Amazon/Whole Foods



Q5. What do OGP deliveries actually look like?

At several junctures, we asked participating agents to take pictures of their orders. Below we show OGP orders as delivered to agents' vehicles. Then, on the next page, we provide photos of the produce purchased through OGP services—so you can inspect the freshness yourself.

"All the fruit/veggies were in perfect condition! I was amazed, particularly, at the quality of the pears."

- Amazon/Whole Foods OGP user



Photos by our agents



Photos by our agents

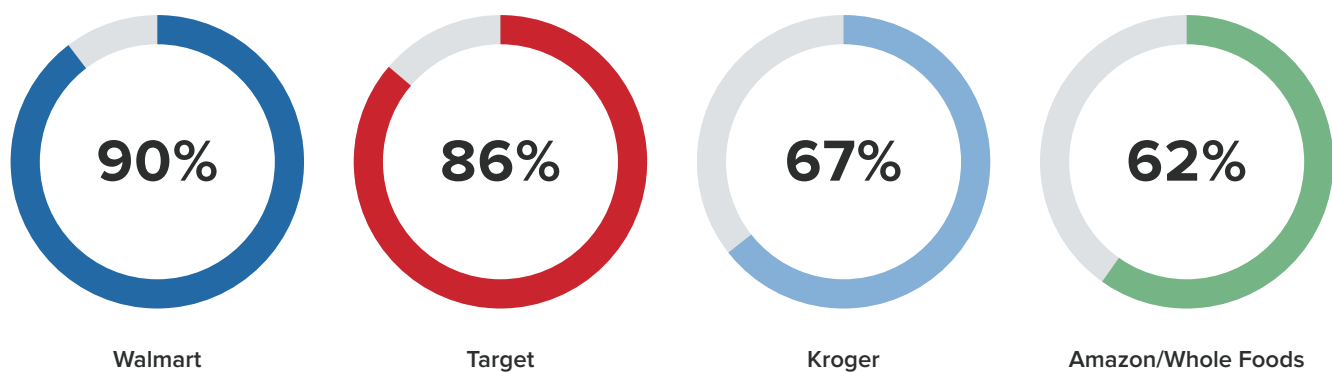
Q6. How satisfied are users with their OGP experiences?

At the end of the OGP process, we asked agents to rate their overall experience and to tell us whether they're more or less likely to use their designated retailer's OGP again in the future. Here's how the results came back.

Rate the overall pickup experience, where 5 is "excellent" and 1 is "poor"



% of OGP users at least A LITTLE MORE LIKELY to use the retailer's OGP service in the future, following this most recent experience



Agent Photo

Q7. What are the top frustrations among OGP users?

For this final question, let's return to the original February 6, 2020 survey of 1,646 shoppers. Field Agent asked OGP users to tell us their top frustrations with online grocery pickup prior to the pandemic. No choice options were presented for this free form question. Below we present the top themes in two categories: primary frustrations (with representative quotes) and secondary frustrations. Though all frustrations below are shared by multiple OGP users, the primary frustrations are most common.

1 Waiting for the pickup delivery

"The most frustrating part is waiting for them to bring it to me....At times my patience needs work."

2 Unavailable items

"When the item is out-of-stock and they do not tell me until I'm at the store."

3 Poor/unequal substitutions

"If I order peach flavored pie filling, it is because I am making a peach pie. I always get apple or cherry of the brand I ordered."

4 Incorrect/incomplete orders

"The most frustrating part would be a missing or wrong item. Because you have to do it one more time..."

5 Inability to pick produce/meat

"[The most frustrating part is] not being able to pick out the produce yourself."

6 Poor quality produce/meat

"The one time I purchased fresh foods from our local grocery store I received produce that was barely what I would consider fresh."

Secondary Frustrations

- Inability to use coupons
- WIC/food stamp acceptance
- Not seeing sales/clearances
- Limited selection
- Time-consuming online ordering
- No easy way to add onto an order
- Too many plastic bags
- Inattention to expiration dates
- Difficult to compare prices/products
- Damaged items
- Limited time slots for pickup
- Same-day pickup unavailable
- Target not offering fresh groceries
- App/website bugs
- Minimum purchases/service costs
- Inability to handle products/see up-close
- Too few pickup spaces

5 "Drive-Aways" about OGP

We now come to the end of the report. The goods have been delivered.

But before we drive away, what did we learn from this in-depth look at OGP, a look based on 84 mystery shops/audits of pickup operations across the country as well as surveys across 3,346 U.S. shoppers?

Let's consider 5 quick drive-aways:

1. OGP is here to stay

Adoption by shoppers may have been slow-going at times, but OGP, it seems, has now become embedded in U.S. shopping culture, changing the way many shop for, purchase, and acquire groceries. In Field Agent's survey, 64% of respondents said they have used OGP, and, among these, virtually half said they use the service once a month on average. And it seems the coronavirus crisis, while bogging down OGP operations in some cases, has still resulted in a net increase for OGP use.

OGP is *not* a flash in the pan.

2. Walmart is currently king of the OGP hill

Of pickup users in our original February survey (n = 1,061), a whopping 85% said they use Walmart's OGP service, while 33% said they use Target, 16% Kroger/Kroger brands, and 12% Amazon/Whole Foods. This pecking order hasn't changed in the wake of the coronavirus outbreak. No doubt Walmart's diffuse store presence and its early-mover advantages have helped the retailer achieve OGP prowess.

Mystery shop results, too, were complimentary of Walmart's OGP service. The retailer's overall 4.8 rating was higher than Kroger (4.6), Target (4.6), and Amazon/Whole Foods (4.0).

In OGP, everyone appears to be chasing Walmart.

3. Is the online experience trailing the pickup experience?

From both quantitative results and shopper commentary, it appears the website/in-app experience may be lagging behind—slightly—the brick-and-mortar pickup experience. Mystery shoppers rated various dimensions of the online experience more negatively than various dimensions of the pickup site and pickup personnel. Also, shopper comments suggest some feel online grocery shopping and ordering is time-consuming, restraining, or “buggy.”

A retailer's OGP service can only be as good as its online experience.



4. The fresh lottery?

Ever since Field Agent started studying OGP in 2015, produce freshness has remained a top concern among OGP users and would-be users. “You can’t trust someone else to pick produce that’s up to your standards,” is a common belief. And our survey data—with only half of OGP users saying their purchase produce through the service—suggests this attitude lingers.

Of 62 OGP “freshness” ratings, only five ratings were at the lower end of the spectrum—either “fair” or “poor.” In all, 47 of 62 produce purchases were rated either “excellent” or “very good,” the higher end of the spectrum.

What does this tell us? It tells us, chances are, if you’re a shopper considering using OGP to purchase fresh produce, you’re probably going to like the produce picked for you.

Probably.

But is probably good enough for would-be OGP users, or does it feel like playing the fresh lottery?

5. Improvement is hard won

Many of the frustrations shoppers feel toward OGP have remained unchanged since we started studying the topic over 4 years ago. Whether it’s out-of-stocks, substitutions, produce quality, too many plastic bags, inability to use coupons, or practically any other frustration mentioned on the previous page...it’s probably not a *new* frustration. It’s probably a frustration that’s been around since OGP’s maiden voyage.

This suggests yardage is hard won in the OGP game, that frustrations felt by shoppers are not alleviated simply or easily. And at a time when retailers are still just trying to make OGP profitable, it’ll be interesting to observe where they do and do not invest time and money making OGP more convenient for shoppers.



Take Control of OGP. On-Demand.

OGP *isn't* outside your view; it *isn't* outside your control.

From site audits to Digital Demos, the Field Agent platform has the cutting-edge tools to help brands and retailers win at OGP. Right now, well over a million agents are standing by to capture photos, collect insights, gauge conditions, and even make purchases.

*Whatever you need to succeed at OGP.
Completely on-demand.*

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