

Why customer wait times matter:

How automating curbside and BOPIS can supercharge your business.

Maximizing staff efficiency — Key benchmark data on wait times for restaurants, grocery, and retail.



Off-premise ordering is here to stay

Recent research shows that even when COVID-19 shopping restrictions are permanently lifted, consumers will continue to buy online and collect their purchases in-store or at the curb. By the end of 2021, click and collect sales in the US are forecasted to total \$US 83.47 billion, comprising 9.9% of total e-commerce sales, and for the next four years, will likely sustain double-digit growth.¹ In the grocery vertical, curbside pickup is rapidly becoming the norm for digital shoppers. In 2019, only 39.0% of click-and-collect shoppers were buying their groceries online and collecting at the curb or in-store. (BOPIS) However, in 2020, the percentage of BOPIS accounted for by grocery jumped to 58.0%, and is projected to reach 60.4% by 2022.²

To compete in this new environment, companies that provide excellent off-premise solutions will surpass those that can't match high customer expectations for ease and convenience. As Jeff Baskin, Chief Business Officer at Flybuy, explained, "One of the key strategies companies are turning to in order to ensure an excellent customer experience is investing in technology to reduce pickup wait times, both in-store and at the curb, all while making staff more efficient."

In this playbook, we report the results of a study that explores the relationship between curbside pickup wait times, customer satisfaction, and the likelihood of repeat visits in the restaurant,

grocery and retail verticals. We present the difference in results for those that use a sophisticated and proactive location-based solution for their curbside pickup, and those that don't. Finally, we discuss how streamlining curbside pickup and BOPIS can positively impact customer retention, increase the likelihood to reorder, and drive growth in off-premise revenue.

BY THE END OF THIS PLAYBOOK, READERS WILL:

- 1 See the top-ranking curbside performers in the grocery, retail, and restaurant industry.
- 2 Learn how to drive off-premise revenue and keep customers coming back.
- 3 Understand the different technologies you can leverage to improve your off-premise solution.
- 4 Determine the key driving factors for high customer satisfaction.

¹ <https://www.emarketer.com/content/click-collect-already-popular-option-finds-new-gear>

² <https://www.emarketer.com/content/us-click-collect-2020-2021>

Methodology:

Throughout June, July, and August 2021, Flybuy and Industry Dive commissioned a group of undercover shoppers who conducted hundreds of tests at 30 of the biggest restaurants, retailers, and grocery stores in the US.

These tests took place across 18 states and focused specifically on curbside pickup wait times. Our secret shoppers placed online orders (via web or app) and collected 17 data points to evaluate the pickup experience.

Wait time data was also collected and analyzed from restaurants, retailers, and grocers that were using Flybuy Pickup technology for their curbside solution, and then compared to non-users.

➤ Brands are losing customers by making them wait

In measuring the relationship between wait times, customer experience, and reordering, survey data clearly shows that shorter wait times are associated with higher levels of customer satisfaction and an increased probability of repeat visits. Conversely, we see in the chart to the right, on a scale of zero to five stars, with five stars being the most satisfied or most likely to come back, and zero stars being the least satisfied or least likely to repeat, as wait times increase, these two factors drop dramatically.



Customers are

3X more likely to reorder

if they wait less than

2 minutes

for their curbside pickup.



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Brands utilizing Flybuy technology have seen an **increase of an average of 22% in off-premise order volume when using location technology.**

That, combined with a larger basket size for digital orders, leads to a direct correlation to ROI.

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Jeff Baskin Flybuy's Chief Business Officer

➤ Wait times

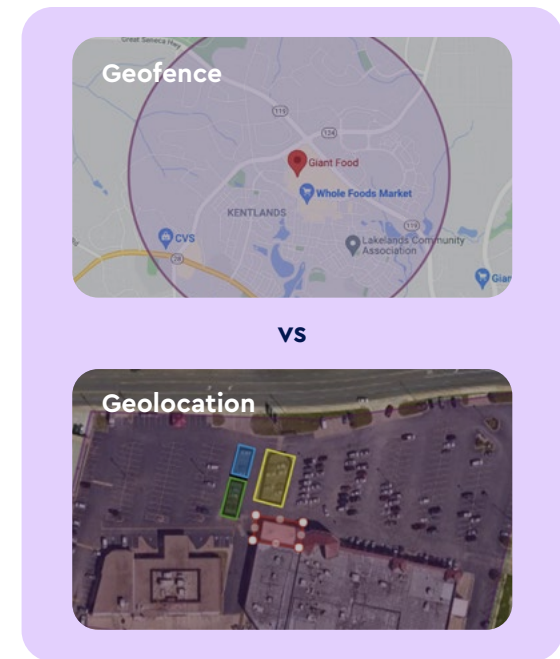
The same data shows that customers are three times more likely to reorder if they wait less than two minutes for their curbside pickup. “At two minutes, customers start questioning whether the store really knows they are there waiting, if they need to go into the store, and eventually, if they should have shopped somewhere else that is more convenient,” said Baskin.

➤ Streamlining off-premise pickup with location technology

Location technology has both the potential to improve the customer experience and streamline order fulfillment. Knowing exactly where the customer is when they are traveling to the store gives the staff an opportunity to be proactive with their order preparation, fulfillment, and handoff. Without this visibility, the staff is forced to be reactive when a customer shows up, scrambling to get the order ready and out to the curb.

Using location technology can not only bring customer wait times down, but can also streamline the same-day delivery process. The faster same-day delivery drivers can move through the collection process, the less time they need to interact with employees, or take up space in-store or at the curb, waiting for their delivery orders. Meanwhile, the more delivery orders are fulfilled, the more drivers are focused on servicing your brand.

Sector	Average wait time	Average wait time using geolocation technology	How much faster is geolocation technology?
Quick-service restaurants	7:06	1:38	80%
Casual dining	5:04	1:47	70%
Retail	4:47	1:48	66%
Grocery	4:58	1:49	63%



➤ What's the difference between Sophisticated Geolocation Technology vs Traditional Geofence?

Some retailers use geofencing to predict a customer's arrival on premise, but it has proven to be inaccurate with significantly delayed notifications and large margins for error. On the other hand, sophisticated geolocation technology combined with mobile sensor data provides extremely accurate ETAs, instantaneous notifications to both customers and staff, and precise location within the parking lot or store. This helps provide retailers with confidence that a customer is five minutes away, or has

arrived, and is in a curbside spot with no false alarms. With a standard geofence, it's very possible to receive a notification that someone has arrived when they are actually several blocks away which can cause real operational problems for staff. No one location runs the same, so ensuring that your technology solution is flexible and configurable is key to meeting customer expectations and, more importantly, your operational needs.

Restaurants:

“Fast pickup may be most critical in the restaurant sector, with 90% of orders being ASAP orders,” said Baskin. “In that case, the restaurant needs to start locating the customer almost immediately,” he added. With location updates, staff can multitask, juggling in-store and off-premise orders based on the customers’ arrival times. In addition to receiving alerts when the customer is on their way to pick up, restaurants can leverage location technology to be most efficient

with make-times for specific items or the entire orders. “They can customize the solution to alert staff when a customer is two minutes away so they can fire the order, or they can set it up so they are alerted when specific items are included in their order, like french fries or milkshakes,” Baskin noted. “These items take a very specific amount of prep time, and having them ready the moment the customer arrives is key for a seamless off-premise experience,” he added.



Casual dining

1:47 minutes

Average wait time with
location technology

5:04 minutes

Average wait time without
location technology



Quick service restaurants

1:38 minutes

Average wait time with
location technology

7:06 minutes

Average wait time without
location technology

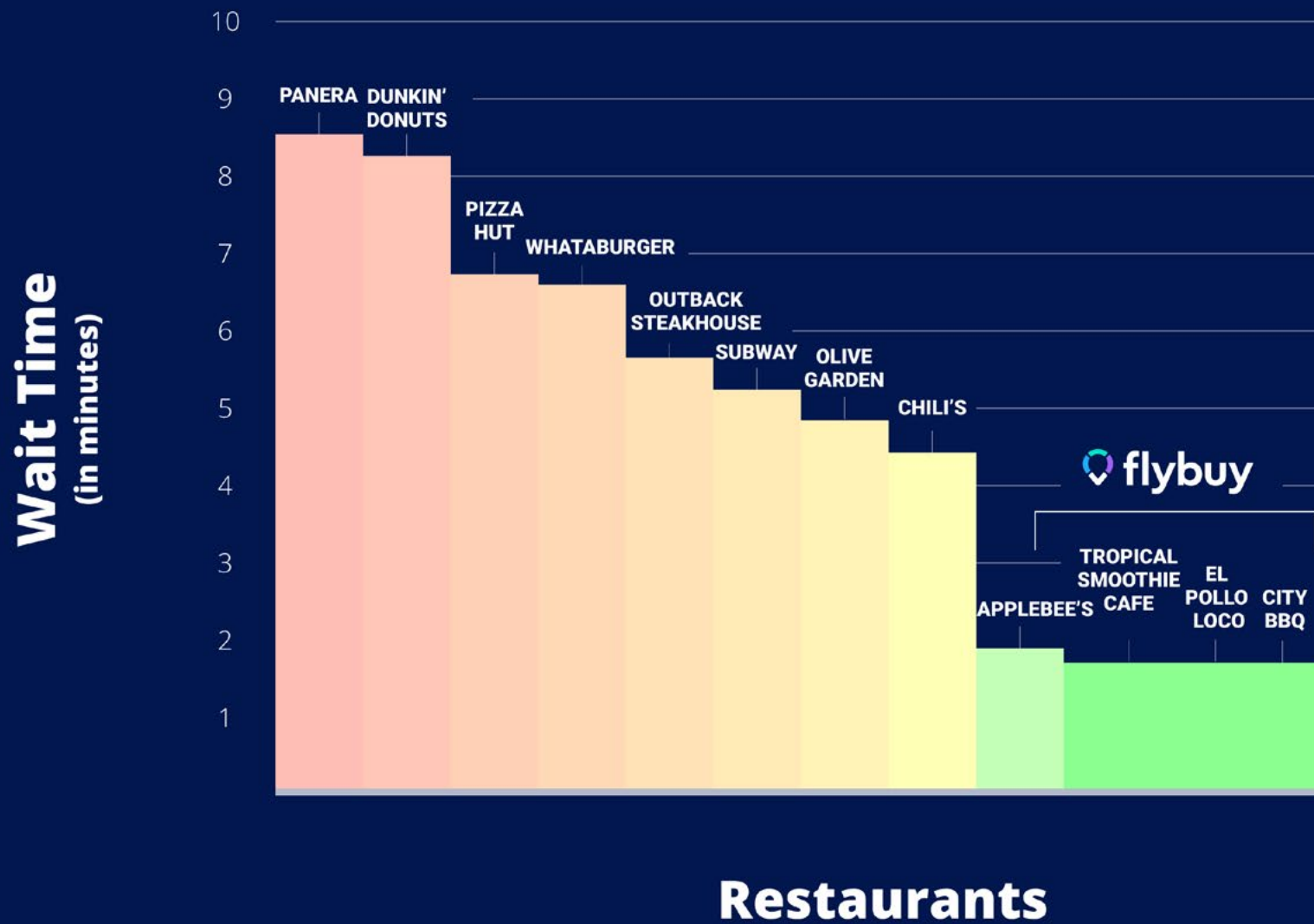
► El Pollo Loco uses location technology to combat long wait lines

At El Pollo Loco, a U.S.-based Mexican-style restaurant chain with 500 locations, dining room closures during the COVID-19 pandemic required a quick expansion of ordering options. “We were operating on drive-thru alone during the closures,” said Clark Matthews, Vice President of IT at El Pollo Loco, “and we required more options to handle the volume. Customers were either waiting in extremely long drive-thru lines or deciding to pass the lines entirely,” he added.

The restaurant was losing customers, and without curbside pickup, it was missing the opportunity to provide frictionless convenience for its guests. “The Flybuy solution went hand in hand with our curbside strategy,” Matthews said, “and their team worked with us to understand the technology in order to build a direct integration with our point-of-sale system. The goal was to keep the layers of interface between the guests and the employees to a minimum,” he explained. “We integrated the arrival notifications directly onto our kitchen display systems so the employees wouldn’t have to add any new devices into their operations.” “Ultimately, streamlining curbside pickup has opened an effective new order channel up for El Pollo Loco,” Matthews said, “and the 10% or so of our restaurants that didn’t have drive-throughs thanked us profusely for giving them an alternative way to serve their customers.”



Restaurant Wait Times



Grocery:

Grocers have the challenge of juggling orders with a variety of storage requirements to ensure the products are fresh. With location technology, the grocer is notified when the customer is on their way with multiple alerts along their journey and can then prioritize when to destage the order that has already been picked and put in the freezer, the refrigerator, or ambient sections. "Typically, grocers are looking for a five minute heads up that the customer is arriving which provides them enough time to stop what they are doing and prioritize the inbound customer. They now have time to destage the order and have it ready as soon as the customer hits their pickup area," Baskin said.

Grocery

1:49 minutes

Average wait time with
location technology

4:58 minutes

Average wait time without
location technology





Peapod
DIGITAL LABS

“That’s a massive optimization they’ve gained. Because of that, they’ve seen increases in customer-satisfaction ratings, with 80% saying they will be ordering from these brands’ stores again.”

—
Vik Bharadwaj, Senior Product Manager,
Peapod Digital Labs

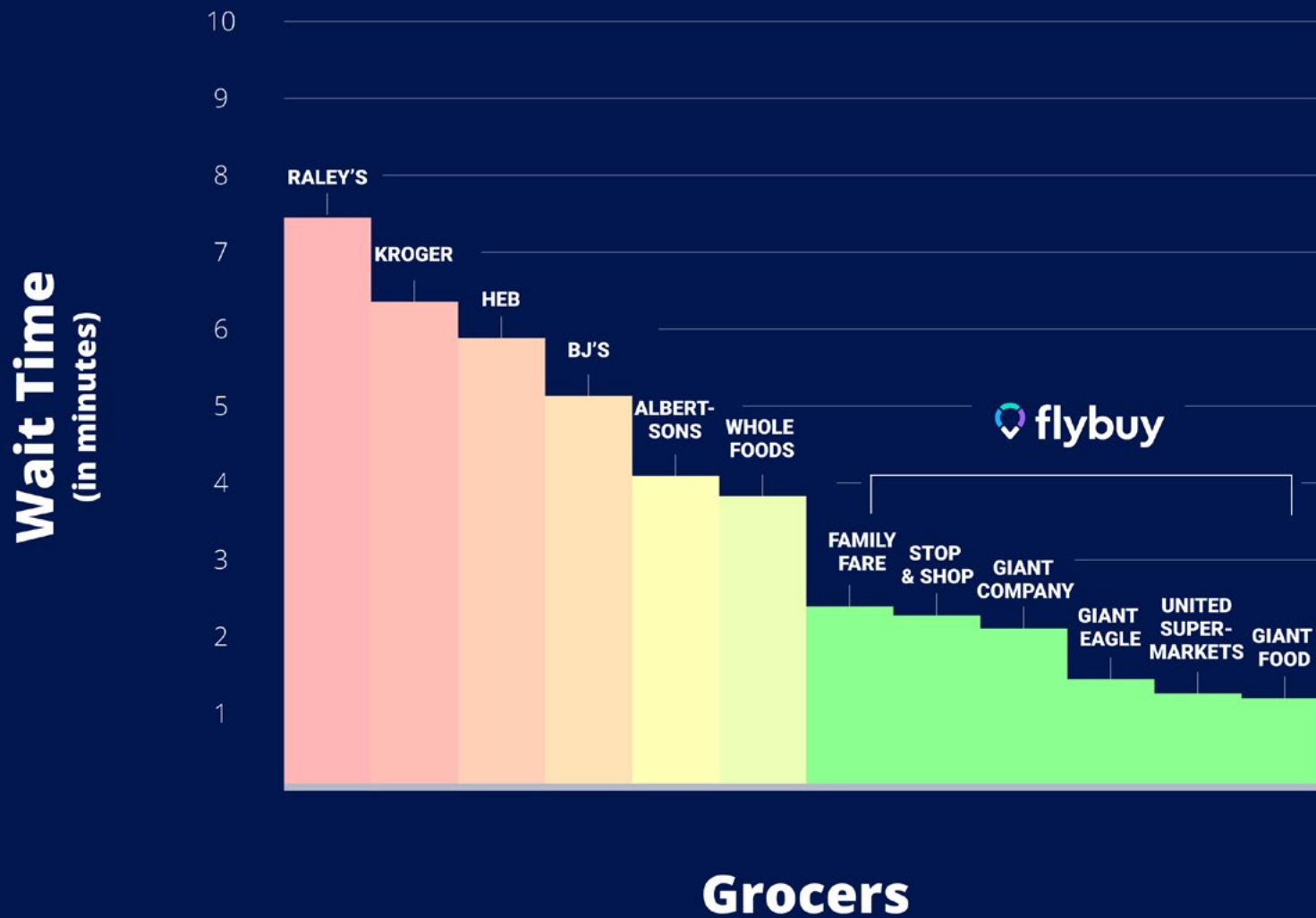
➤ **Peapod Digital Labs leverages Flybuy technology to help grocery stores cut wait times in half**

Peapod Digital Labs is the e-commerce heart of the brands of Ahold Delhaize USA, providing digital strategy, management and technology development to the brands, among other services. Peapod Digital Labs uses Flybuy’s location-based technology through its proprietary technology platform to provide customers and staff at the Giant Food, The GIANT Company and Stop & Shop brands with quicker, safer curbside pickup at their nearly 700 locations.

Initially the brands’ curbside pickup required a customer to call the store when they arrived, Vik Bharadwaj, Senior Product Manager at Peapod Digital Labs, explained. “This disrupted workflow and required staff to spend time on the phone. With multiple callers at a time, this meant the customer would have to wait,” he said. “The main objective was to decrease the calls going to store associates, reduce the average wait time for the customer, and make the pickup experience touch-free and frictionless,” he added. “By using location technology, consumers can now share their exact locations and let the store know that they’re on their way.”

Over the course of nine months, Peapod Digital Labs has seen stores using Flybuy technology cut their average wait times in half. “That’s a massive optimization they’ve gained,” Bharadwaj pointed out. “Because of that, they’ve seen increases in customer-satisfaction ratings, with 80% saying they will be ordering from these brands’ stores again.”

Grocery Wait Times



Retail:

“For retailers, curbside pickup is less predictable,” Baskin said. “Most customers will place an order and pick it up within one to five days from the retail outlet, requiring the retailer to hold the order in a staging area. Without enhanced technology, they’ll have no idea when the customer might collect their order. What location technology can do,” he added, “is send a series of reminders to the customer, triggering a notification for the retailer when the customer will be on their way.” The result is a more effective use of staff time and an elimination of the need for the customer to go into the store, allowing retailers to provide the type of curbside service that customers now expect.

Retail

1:48 minutes

Average wait time with
location technology

4:47 minutes

Average wait time without
location technology





Within just weeks of going live with Flybuy, **over 80% of all customers were waiting less than three minutes** for their order and their **customer satisfaction rating averaged 4.87 out of 5 stars.**

➤ JOANN stores beat the Halloween rush

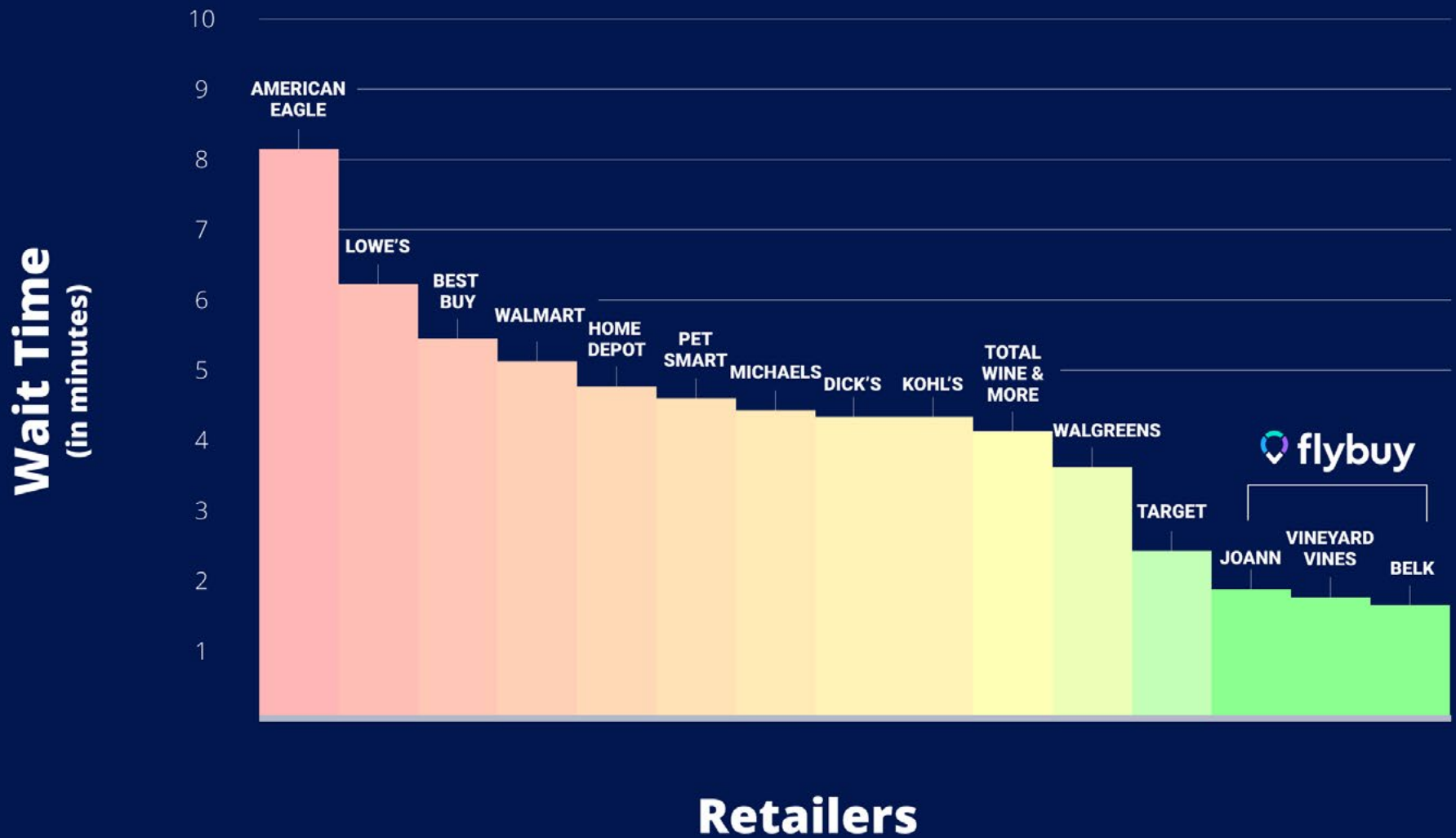
JOANN is a specialty retailer of crafts and fabrics with 865 stores across the country. In the midst of the COVID-19 pandemic and the rapidly approaching peak Halloween season, JOANN recognized it needed innovation and technology to enhance their Buy Online, Pickup In Store (BOPIS) solution, and, in order to meet dramatic peaks in demand, it would also need a location-based solution that could streamline their off-premise order fulfillment.

“Our first pass at curbside service was a low-technology lift just to be able to keep our stores open during the pandemic lockdown,” explained Melissa Cook, Director of E-commerce, Omni-Channel and Business Development at JOANN. “However, as we headed toward the holiday season, it soon became evident that we wouldn’t be able to efficiently handle the peak curbside pickup volumes. The objective was to not only make it easier for the customer to collect their orders,” Cook said, “but also to make it easier for our team members to serve the client.”

The company partnered with Flybuy, and within weeks the technology was running in all 865 stores, just in time for the Halloween rush. The technology allows JOANN store associates to determine exactly when a customer will pick up their order, with location updates along the way. It also allows them to set priority fulfillment based on arrival times and then meet the customer curbside as soon as they arrive.

Within just weeks of going live with Flybuy, over 80% of all customers were waiting less than three minutes for their order and their customer satisfaction rating averaged 4.87 out of 5 stars.

Retail Wait Times



Best Practices

There were a few key themes we saw amongst the brands that performed best during our testing. First, clear instructions were provided when completing a pickup, including the actions needed before setting off to the store, guidance on where to park, or what to do upon arrival. If customers are given easy directions to follow, then wait times tend to be lower and satisfaction levels tend to be higher. Conversely, it was discovered that when customers are left to figure things out for themselves due to confusing instructions, satisfaction levels and likelihood to reorder both drop dramatically. Brands that performed poorly in our study often just provided a phone number to call upon arrival without providing much other guidance; this puts the onus on the customer and makes for a stressful experience.

Second, staff were engaged with the off-premise program. Brands such as Walmart and Target have staff who are focused on bringing orders out to the curb to ensure a smooth pickup process. However, dedicated staff is not necessary for a successful program. Giving staff the tools they need to be completely aware of each incoming off-premise customer is essential for a successful program. If a customer has to wait more than two minutes for their order, they are likely to begin worrying about whether they have been forgotten and if their order will ever be brought out. By ensuring staff are focused on pickups, staff can get orders out before customers start to worry, ensuring that they have an experience that makes them more likely to order again.

Last, ample curbside pickup parking spots were available. If customers are forced to drive around the parking lot searching for a space, they tend to become frustrated and are forced to wait longer for their order. For locations where this isn't possible, brands should consider partnering with a location technology company that can create "virtual pickup zones" in the parking lot. That way, guests can park anywhere, but staff knows exactly where they are at all times.



Top tips for executing a best-in-class off-premise solution

- 1** Customer engagement is key. Your off-premise solution should be able to serve 100% of your customers, whether they decide to order within the app, on the website, or prefer a manual fallback.
- 2** Ensure that the technology partner you choose will provide the right pre- and post-implementation support services, as well as provide their long-term commitment to working with the brand.
- 3** The solution must alert the staff with customer arrival updates in order to accurately prioritize order fulfillment, allowing management to make operational enhancements based on store-level wait time analytics.
- 4** The solution needs to be completely configurable by each location and scalable. No location runs the same!
- 5** A synchronized and automated messaging platform for customers and staff is extremely important so everyone understands the process.
- 6** Take privacy seriously. Make sure your customers feel comfortable and that your app is not requiring location settings to be “Always in Use.” Tracking should only be done while the customer is in the process of a pickup. Not before or after.
- 7** When investing in technology and innovation, ensure that you are always set up to future-proof your business with alternative pickup methods, loyalty, contactless payments, same day delivery, and more.

Conclusion

In this playbook, we've shown the important relationship between wait time, customer satisfaction, and the likelihood that a customer will reorder from a particular retailer. We've also shown that average wait times in the restaurant, grocery, and retail sectors are dramatically shorter when brands use predictive location technology.

With an automated off-premise solution, retailers can create a streamlined experience for their customers and improve staff efficiency. For companies looking to improve their wait times and boost customer satisfaction, they should invest in technology to set them apart from the competition and deliver the same five-star experience for off-premise customers as they do for on-premise customers.

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“You can build the best app and have the best customer experience and even provide the best location solution for the customer. But if the staff inside is not receiving the alerts in a timely manner and able to act on them, then the whole solution falls apart.”

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Jeff Baskin Flybuy's Chief Business Officer





by Radius Networks

Radius Networks is a location technology company that helps companies save time for customers and staff by streamlining operations and the user experience. The Flybuy SaaS platform which includes Pickup, Drive-Thru, Pay, and Tablesides, is leveraged by restaurants, retailers, and grocers around the world in over 50 countries, including Five Guys, Ahold Delhaize USA Brands, Domino's, Harris Teeter, JOANN Fabrics, Vineyard Vines, and many more.

With 35 global patents, an in-house team of location engineers, and proprietary machine-learning technology, Radius Networks is a recognized technical leader in the industry. Flybuy provides a high-value, innovative solution for a frictionless customer and staff experience. With Flybuy Pickup's early alerts, staff can be proactive when fulfilling orders and perfectly time the order handoff upon customer arrival. Flybuy's accuracy is unmatched, and uses proprietary algorithms that ingest mobile location awareness, real-time traffic data, and other mobile sensor and environmental inputs to deliver location information that makes curbside, in-store, and drive-thru pickup fast, accurate, and frictionless. Flybuy is configurable by each location and can be adjusted easily by the brand at any time. If you would like to see how Flybuy can automate staff operations and simplify the guest experience, [contact us today!](#)

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