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THE SURVEY CONSULTANTS

CW9418EC Executive

Summary

Finn Partners x Wireless Logic

04.04.2022 - 08.04.2022

CW9418EC EXECUTIVE SUMMARY

PREPARED FOR: Finn Partners x Wireless Logic

1,224 UK adults (excluding those aged 55+)

04.04.2022 - 08.04.2022

QUESTION 1

Q1. On average, how often do you shop online each week, if ever?

- Just under 7 in 10 (69%) respondents shop online 1-3 times each week.
- Just under a fifth (19%) of respondents shop online 4-6 times each week.
- 1 in 20 (5%) respondents shop online 7-10 times each week.
- On average, respondents shop online 3 times each week.
- Over three quarters (77%) of female respondents shop online 1-3 times each week, whilst 3 in 5 (60%) male respondents said the same.
- On average, respondents aged 16-24 shop online 4 times each week, whereas respondents aged 45-54 do so 3 times each week.

QUESTION 2

Q2. How many shopping apps do you have on your smartphone, if any?

- Just over 2 in 5 (41%) respondents have 1-3 shopping apps on their smartphone.
- Just over 3 in 10 (31%) respondents have 4-6 shopping apps on their smartphone.
- Just over 1 in 6 (17%) respondents have 7-10 shopping apps on their smartphone.
- On average, respondents have 5 shopping apps on their smartphone.
- Over a third (36%) of respondents aged 16-24 have 4-6 shopping apps on their smartphone, compared to just over a fifth (21%) of respondents aged 45-54 who said the same.

QUESTION 3

Q3. Approximately what % of your monthly shopping is done online and what % is done instore?

Instore

- 3 in 10 (30%) respondents said 26-50% of their monthly shopping is done instore.
- Just under a fifth (19%) of respondents said 51-75% of their monthly shopping is done instore.
- Just over a fifth (21%) of respondents said 76-99% of their monthly shopping is done instore.
- 1 in 10 (10%) respondents said 100% of their monthly shopping is done instore.
- On average, respondents said 61% of their monthly shopping is done instore.

Online

- Over a third (35%) of respondents said 26-50% of their monthly shopping is done online.

- Almost a fifth (18%) of respondents said 51-75% of their monthly shopping is done online.
- 1 in 6 (16%) respondents said 76-99% of their monthly shopping is done online.
- On average, respondents said 43% of their monthly shopping is done online.
- On average, respondents aged 16-24 said 49% of their monthly shopping is done online, whereas respondents aged 45-54 said 43%.
- On average, respondents in the East of England said 46% of their monthly shopping is done online, whilst respondents in the South West said 41%.

QUESTION 4

Q4. When it comes to receiving your purchase, what combination of the below delivery methods have you used in the last 3 months, if any? Tick all that apply

The top 5 delivery methods respondents have used in the last 3 months are:

1. Next day delivery (67%)
 2. Click and collect (44%)
 3. Same day delivery (31%)
 4. Delivery to an address that is not your home (16%)
 5. Lockers (12%)
- Just under three quarters (74%) of female respondents have used next day delivery in the last 3 months, whilst under 3 in 5 (57%) male respondents said the same.
 - Over a third (36%) of respondents aged 16-24 have used same day delivery in the last 3 months, compared to over a fifth (23%) of respondents aged 45-54 who said the same.

QUESTION 5

Q5. Which one method of payment do you use most often? Select best match

The top 5 payment methods respondents use most often are:

1. Chip and Pin/Contactless (38%)
 2. PayPal (29%)
 3. Apple Pay (17%)
 4. Cash (9%)
 5. Google Pay (6%)
- Over 2 in 5 (43%) female respondents said the method of payment they use most often is Chip and Pin/Contactless, whilst just over 3 in 10 (31%) male respondents said the same.
 - 3 in 10 (30%) respondents aged 16-24 said the method of payment they use most often is Apple Pay, whereas 1 in 12 (8%) respondents aged 45-54 said the same.

QUESTION 6

Q6. If your preferred payment is unavailable when buying something, what would you be most likely to do?

Shopping in-store

- Just over 3 in 5 (61%) respondents said if their preferred payment is unavailable when shopping in-store they would be most likely to find an alternative way to pay.

- 1 in 6 (16%) respondents said if their preferred payment is unavailable when shopping in-store they would be most likely to find another retailer.
- 1 in 8 (12%) respondents said if their preferred payment is unavailable when shopping in-store they would be most likely to try again another time.
- Just over a fifth (21%) of male respondents said if their preferred payment is unavailable when shopping in-store they would be most likely to find another retailer, whilst 1 in 8 (12%) female respondents said the same.

Shopping online

- Over half (55%) of respondents said if their preferred payment is unavailable when shopping online, they would be most likely to find an alternative way to pay.
- Just over a fifth (21%) of respondents said if their preferred payment is unavailable when shopping online, they would be most likely to find another retailer.
- Just over 1 in 7 (15%) respondents said if their preferred payment is unavailable when shopping online, they would be most likely to try again another time.
- Just under two thirds (65%) of female respondents said if their preferred payment is unavailable when shopping online, they would be most likely to find an alternative way to pay, whilst over 2 in 5 (43%) male respondents said the same.
- Over a fifth (23%) of respondents aged 16-24 said if their preferred payment is unavailable when shopping online, they would be most likely to try again another time, compared to 1 in 8 (12%) respondents aged 45-54 who said the same.

QUESTION 7

Q7. If a card machine was available instore, but it was not working when you attempted to make payment, who do you assume is at fault, if anyone? Select best match

- 2 in 5 (40%) respondents said if a card machine was available instore, but it was not working when they attempted to make payment, they would assume the app/terminal is at fault.
- Just over a fifth (21%) of respondents said if a card machine was available instore, but it was not working when they attempted to make payment, they would assume the bank is at fault.
- Just over a fifth (21%) of respondents said if a card machine was available instore, but it was not working when they attempted to make payment, they would assume the retailer is at fault.
- Over 2 in 5 (46%) female respondents said if a card machine was available instore, but it was not working when they attempted to make payment, they would assume the app/terminal is at fault, whereas over 3 in 10 (32%) male respondents said the same.
- Nearly half (47%) of respondents aged 35-44 said if a card machine was available instore, but it was not working when they attempted to make payment, they would assume the app/terminal is at fault, whereas just under 3 in 10 (29%) respondents aged 16-24 said the same.

QUESTION 8

Q8. How concerned, if at all, are you about the security of your personal details/payment information when making an electronic payment?



- Almost 3 in 5 (58%) respondents are concerned* about the security of their personal details/payment information when making an electronic payment, with 1 in 7 (14%) who are extremely concerned.
- Over 2 in 5 (42%) respondents are not concerned** about the security of their personal details/payment information when making an electronic payment.
- Over 3 in 5 (63%) male respondents are concerned* about the security of their personal details/payment information when making an electronic payment, whilst over half (53%) of female respondents said the same.
- Nearly half (47%) of respondents aged 25-34 are not concerned** about the security of their personal details/payment information when making an electronic payment, whereas over a third (36%) of respondents aged 45-54 said the same.

*‘Extremely concerned’ and ‘Somewhat concerned’ answers combined.

**‘Not too concerned’ and ‘Not concerned at all’ answers combined.

QUESTION 9

Q9. Whose responsibility do you believe it is to ensure the security of your payment? Tick all that apply

- Over half (53%) of respondents believe it is the bank’s responsibility to ensure the security of their payment.
- Half (50%) of respondents believe it is the payment processing firm (i.e. PayPal, Sage, WorldPay, etc.) responsibility to ensure the security of their payment.
- 2 in 5 (40%) respondents believe it’s their responsibility to ensure the security of their payment.
- Nearly 2 in 5 (37%) respondents believe it’s the retailer’s responsibility to ensure the security of their payment.
- Over half (55%) of female respondents believe it is the payment processing firm (i.e. PayPal, Sage, WorldPay, etc.) responsibility to ensure the security of their payment, whilst over 2 in 5 (43%) male respondents said the same.
- Over 2 in 5 (42%) respondents aged 35-44 believe it’s the retailer’s responsibility to ensure the security of their payment, whereas under 3 in 10 (28%) respondents aged 16-24 said the same.

QUESTION 10

Q10. In the last three months how many times, on average, have you used a vending machine to make a purchase in any of these places?

- On average, in the last three months respondents have used a vending machine to make a purchase in train stations, 4 times.
- On average, in the last three months respondents have used a vending machine to make a purchase in airports, 5 times.
- On average, in the last three months respondents have used a vending machine to make a purchase within a physical retail outlet, 4 times.
- On average, in the last three months respondents have used a vending machine to make a purchase in a hotel, restaurant, bar or other hospitality venue, 4 times.



- On average, in the last three months respondents have used a vending machine to make a purchase on a public street, 5 times.
- On average, in the last three months male respondents have used a vending machine to make a purchase in train stations, 5 times, whilst female respondents have done so 4 times.

QUESTION 11

Q11. To what extent do you agree or disagree with the following statement? I think there should be more options to purchase goods through vending machines in the UK

- Over 2 in 5 (46%) respondents agree* with the statement 'I think there should be more options to purchase goods through vending machines in the UK', with 15% who strongly agree.
- Over half (53%) respondents aged 16-24 agree* with the statement 'I think there should be more options to purchase goods through vending machines in the UK', whereas 2 in 5 (40%) respondents aged 45-54 said the same.
- Nearly 3 in 5 (57%) respondents in Northern Ireland agree* with the statement 'I think there should be more options to purchase goods through vending machines in the UK', whilst over a third (35%) of respondents in the East of England said the same.

*'Strongly agree' and 'Somewhat agree' answers combined.

QUESTION 12

Q12. Why are you most likely to agree with this? Select up to three

The top 5 reasons why respondents are most likely to agree with this are:

1. It's more convenient (53%)
 2. Vending machines can be situated in more accessible locations (45%)
 3. The operating hours are friendlier (33%)
 4. It shows that a retailer is forward thinking and innovative (30%)
 5. It is better for private purchases (19%)
- Just over 1 in 7 (15%) respondents are most likely to agree with this because they prefer not to deal with sales assistants.
 - Over 3 in 5 (62%) female respondents are most likely to agree with this because it's more convenient, whilst over 2 in 5 (42%) male respondents said the same.
 - Over 3 in 5 (63%) respondents aged 25-34 are most likely to agree with this because it's more convenient, whereas under half (48%) of respondents aged 45-54 said the same.

QUESTION 13

Q13. If available, would you be willing to purchase any of these items from a vending machine?

- Just under three quarters (74%) of respondents said if available they would be willing to purchase non-alcoholic drinks from a vending machine.
- 2 in 5 (40%) respondents said if available they would be willing to purchase medicine from a vending machine.



- Almost half (48%) of respondents said if available they would be willing to purchase hot food from a vending machine.
- Just over a quarter (26%) of respondents said if available they would be willing to purchase clothes from a vending machine.
- Nearly 2 in 5 (37%) respondents said if available they would be willing to purchase make up and cosmetics from a vending machine.
- Almost half (48%) of respondents said if available they would be willing to purchase alcohol from a vending machine.
- Just over 3 in 5 (61%) respondents said if available they would be willing to purchase magazine and newspapers from a vending machine.
- Just over 3 in 10 (31%) respondents said if available they would be willing to purchase vaping products from a vending machine.
- Over half (55%) of male respondents said if available they would be willing to purchase hot food from a vending machine, whereas over 2 in 5 (43%) female respondents said the same.

QUESTION 14

Q14. When ordering fast food, how long are you prepared to wait from placing the order to delivery?

- Almost a third (32%) of respondents said when ordering fast food, they are prepared to wait 16-30 mins from placing the order to delivery.
- Almost a third (32%) of respondents said when ordering fast food, they are prepared to wait 31-45 mins from placing the order to delivery.
- Over a fifth (23%) respondents said when ordering fast food, they are prepared to wait 46 mins up to an hour from placing the order to delivery.
- On average, respondents said when ordering fast food, they are prepared to wait 35 minutes from placing the order to delivery.
- On average, respondents aged 25-34 said when ordering fast food, they are prepared to wait 37 minutes placing the order to delivery, whereas respondents aged 45-54 are prepared to wait 33 minutes.

QUESTION 15

Q15. How important is delivery tracking information for the following, if at all?

- Over 4 in 5 (86%) respondents said delivery tracking information for food and perishables is important*.
- Over 4 in 5 (85%) respondents said delivery tracking information for non-perishable (clothing) items is important*.
- Over 4 in 5 (86%) respondents said delivery tracking information for non-perishable (white goods) items is important*.
- Over 4 in 5 (85%) respondents said delivery tracking information for non-perishable (furniture) items is important*.
- Nearly 9 in 10 (87%) respondents said delivery tracking information for non-perishable (electronics) items is important*.
- Over 4 in 5 (82%) respondents said delivery tracking information for other non-perishable items is important*.



- 9 in 10 (90%) female respondents said delivery tracking information for non-perishable (furniture) items is important*, whereas just under 4 in 5 (79%) male respondents said the same.

*'Very important' and 'Somewhat important' answers combined.

QUESTION 16

Q16. If the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) what action of the below would you be most likely to take regarding future purchases?

- Half (50%) of respondents said if the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) they would be wary of making future purchases from that company.
- Just under 3 in 10 (29%) respondents said if the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) they would not make future purchases from that company.
- 1 in 6 (16%) respondents said if the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) it would not impact their future purchases from that company.
- Nearly 3 in 5 (57%) female respondents said if the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) they would be wary of making future purchases from that company, whereas over 2 in 5 (42%) male respondents said the same.
- Over half (55%) of respondents aged 25-34 said if the delivery experience was poor (i.e. no tracking information, left in an unsuitable place, missed delivery time, etc.) they would be wary of making future purchases from that company, whilst under half (48%) of respondents aged 45-54 said the same.

QUESTION 17

Q17. If you did not receive delivery tracking information from a retailer, how, if in any way, would it negatively impact your views on the retailer? (Tick all that apply)

- Over 2 in 5 (43%) respondents said if they did not receive delivery tracking information from a retailer, they would be concerned about the arrival time (e.g., they might be on a conference call / not be in).
- Just under 2 in 5 (39%) respondents said if they did not receive delivery tracking information from a retailer, they would feel unnerved by not knowing where my package is on its transit route.
- A third (33%) of respondents said if they did not receive delivery tracking information from a retailer, they would think the company is more likely to lose the product.
- A quarter (25%) of respondents said if they did not receive delivery tracking information from a retailer, they would worry the company is not legitimate.
- Just over half (51%) of female respondents said if they did not receive delivery tracking information from a retailer, they would be concerned about the arrival time (e.g., they might



be on a conference call / not be in), compared to just over a third (34%) of male respondents who said the same.

- Nearly half (47%) of respondents in Wales said if they did not receive delivery tracking information from a retailer, they would think the company is more likely to lose the product, whereas just under a quarter (24%) of respondents in the South West said the same.

QUESTION 18

Q18. Would you pay more for an item if the delivery options were more sustainable (i.e. green delivery slots, bicycle deliveries, click and collect, scooter/electric vehicle, delivery robots)?

- Over half (52%) of respondents would pay more* for an item if the delivery options were more sustainable (i.e. green delivery slots, bicycle deliveries, click and collect, scooter/electric vehicle, delivery robots), with 1 in 9 (11%) willing to pay significantly more.
- Just under two thirds (65%) of respondents aged 16-24 would pay more* for an item if the delivery options were more sustainable (i.e. green delivery slots, bicycle deliveries, click and collect, scooter/electric vehicle, delivery robots), whereas over 2 in 5 (45%) respondents aged 45-54 said the same.
- 3 in 5 (60%) respondents in Greater London would pay more* for an item if the delivery options were more sustainable (i.e. green delivery slots, bicycle deliveries, click and collect, scooter/electric vehicle, delivery robots), whilst over 2 in 5 (46%) respondents in Yorkshire and the Humber said the same.

*'Yes, significantly more' and 'Yes, somewhat more' answers combined.

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