

## RAC Foundation - Future of Deliveries Research

### Driving And Shopping

- In the last three months, two thirds (66%) of adults aged 16-75 made journeys in a personal vehicle to go shopping at least once a week. Around 1 in 5 (20%) did this every 2-3 days or more.
- Compared to 12 months ago, 1 in 6 adults (17%) are making trips in a vehicle to go shopping less often. 1 in 8 (12%) are making these trips more often, while around two-thirds (64%) are making about the same number of trips as they did 12 months ago.
- Of those making fewer journeys in a personal vehicle to go shopping compared to one year ago, around 23% say this is because they are doing more shopping online, while 22% are travelling by other means and 21% report they are doing less shopping nowadays. 1 in 5 (20%) say they can't afford to go shopping as much as they used to.

### Online Shopping

- Around 3 in 5 adults (57%) shop online for any of the six product categories tested at least once a month. 62% of women shop online at least once a month for the categories tested, compared to 53% of men.
- Younger adults are more likely to shop online than their older counterparts. 69% of 16-24 year olds shop online at least once a month compared to 52% of those aged 45-54 and 46% aged 55-75.
- The two types of products that the most adults ever purchase online are Clothes/Footwear and Books/CDs/DVDs. More than 4 in 5 (83%) say they purchase these products online.
- Groceries are the product that adults most frequently purchase online (27% of adults shop for groceries online about once a week or more). However, groceries have the lowest proportion of adults say they ever purchase them online (59%).
- Of those who report they ever shop online, 3 in 10 (29%) say they currently do more shopping online than they did 12 months ago compared to only 10% who say that they do less. More than half (56%) say they currently do about the same amount of online shopping compared to 12 months ago.
- Before making purchases online in the last 12 months, more than a third of online shoppers (37%) visited a store in person half the time or more. Only 4% of online shoppers say they always did this.

### Delivery

- Delivery methods are chosen far more often than collection methods for receiving all types of products individuals have ordered online.
- Home delivery is the most commonly used method for receiving all types of products tested
- More than 8 in 10 (82%) adults who purchase books/CDs/DVDs online use home delivery methods to receive these items. In comparison, 7 in 10 adults who shop for groceries online use home delivery methods (71%).
- Click and collect methods are most likely to be used for orders of Clothes and Footwear or Electronic goods. Around 1 in 4 adults who shop for Clothes and Footwear online (27%) and 1 in 5 (20%) who shop for Electronic goods online use these methods.
- In comparison, those who shop for Books/CDs/DVDs online are least likely to use any click and collect methods (13%).
- 1 in 6 (16%) adults ordering groceries online use click and collect to receive their products.
- For all types of products, apart from groceries, rural dwellers are significantly more likely than those living in urban areas to get products delivered to their home address.
- Similarly those individuals that are in work are significantly less likely than those out of work to get goods delivered to their home address.

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### Delivery (cont.)

- 29% of online shoppers tend to use same or next day delivery at least half the time they make purchases online.
- Weekday delivery is most common. 3 in 4 (74%) online shoppers normally receive deliveries on a weekday compared to 1 in 8 (12%) who normally receive them at the weekend. However when asked what their preferred time for receiving deliveries would be, 1 in 4 mentioned a time at the weekend.

### Click and Collect

- Convenience and cost are the most commonly cited reasons for using click and collect methods.
- More than half choose click and collect because they can collect goods at a convenient time for them (53%) and because such methods mean they don't need to be at home to receive their deliveries (51%). 2 in 5 report click and collect enables them to collect their items whilst doing other tasks (40%).
- 43% use click and collect because it is cheaper than having items delivered.
- There has been an increase in the use of click and collect in the last 12 months. 1 in 3 (32%) say that they are using click and collect more often than they did 12 months ago, while around half (51%) say they use such methods about the same amount.

### Christmas

- 73% of all adults and 85% of Christmas shoppers did shopping online for any Christmas presents in 2015.
- 51% of all adults and 59% of Christmas shoppers did at least half of their Christmas shopping for presents for other people online in 2015.
- Women did significantly more shopping online for Christmas presents in 2015 than men (79% compared to 67%).
- Of the adults that bought presents online for Christmas in 2015, 88% used home delivery methods to receive these goods. Around 1 in 4 (26%) used click and collect methods to receive their purchases.
- Adults expect there will be little change in the amount of online shopping they do to buy Christmas presents in 2016 compared to last year, with half expecting to do the same amount. 1 in 6 (17%) thinking they will buy more online, while 1 in 8 (12%) believe that they will buy less.

### **Technical note:**

Research was undertaken by Ipsos MORI on behalf of the RAC Foundation. A nationally representative quota sample of 2,153 British adults aged 16-75 was surveyed using its online I:Omnibus between 28<sup>th</sup> October and 1<sup>st</sup> November 2016. Data have been weighted by age, gender, region, working status and social grade to the known offline population profile. Data have been additionally calibrated using known offline proportions for whether the participant is the main shopper in their household, and whether or not they have bought groceries or products online in the last three months.

Of the 2,153 adults interviewed:

- 371 say they are making less trips in a vehicle to go shopping nowadays compared to 12 months ago
- 2,063 report they make purchases online
- 749 use click and collect methods to get products they ordered online delivered
- 1,661 report that they bought any Christmas gifts for other people online in 2015