A Work Project, presented as part of the requirements for the Award of a Master Degree in Management from the NOVA – School of Business and Economics.

DO FOOD RETAILERS NEED TO ADAPT THEIR BUSINESS MODEL TO MILLENNIALS?

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JANUARY 2019

1. Abstract

We have been seen many technological and social changes that are causing a significant transformation in the society creating new buying and consumption habits, meaning that the way consumers buy today will not be the same in the future.

This paper will study the main and polemical consumer of today, millennials, based on interviewing a significant example. Furthermore, links between the practices that food retailers are doing, possible propositions and the new consumer requirements will draw recommendations to prepare retailers for the next three to five years.

Keywords: food retail, millennials, e-commerce, trends.

2. Introduction

Technology and society changes revolutionized the way to do business and created new consumption habits and requirements that is and will continue mutating how people buy and do their groceries.

For instance, by 2025 online grocery sales are predicted to be 20% of the total groceries sales (Danziger 2018). This increase will involve technology changes, as never before, in the food retail business model. Although, being only technological is not enough for what consumers are demanding.

New generations are forcing retailers to be omnichannel and offer them a more convenient service when buying. The rule is starting to buy whatever, however and whenever they want to create an interaction more intense between logistics and retail. With this environment, the physical store will still be crucial to communicate the brand, involve and develop a relationship with the client. Due to online sales, less “brick and mortar” (Appendix 1) stores will be needed, although there will be an increase in delivery and pick-up points. On the other hand, consumers will be more exigent and will require experiences more personalized. Technology will not only offer a better shopping experience but also will reduce costs due to more automatized process.

Simultaneously, the amount of Big Data and data analysis will increase, allowing retailers to study more in-depth the consumer and predict possible future behaviors. Retailers could also take advantage of this to create more personalized products and services that could build loyalty. The origin and health of products are a matter of the new generations and some retailers are being the first movers investing in good quality private labels.

Until now, all sounds more futuristic and revolutionary although there is a tendency to "return" to the type of offer that we saw in the past. (Nielsen, The future of Grocery 2015) established that we see a resurgence of the old home-delivery model as milk or other daily necessities were delivered in the ´50. In addition, (Nielsen, The future of Grocery 2015) demonstrated that smaller stores formats such as traditional, drug and convenience stores grew faster than large and hypermarkets.

The desire for "fresh" will continue to drive consumers to physical stores for touching, feeling and smelling their food. However, consumers will not spend their time in the store to buy non-fresh products since they could do it online with the comfort of being at home. Saying this, we could think about brick-and-mortar stores specialized in fresh products, as the old markets were doing, and others focused on non-fresh products with huge investments in logistics and technology.

This thesis will focus on investigating what millennials are looking for and requiring when doing their groceries in addition to the trends of the industry that will satisfy this particular consumer to analyze if food retailers need to adapt their business model to these changes and new consumer habits.

3. Literature Review.

The structure style used in this work differentiates from the original ones. Saying this, it was decided to include literature reviews during the development of the research question to make

the study stronger. Thus, the academic literature review is spread all over the paper although it will be explained some general literature used for each topic.

Firstly, is important to know who the millennials are, their characteristics, the way they shop and what are they asking for. To do so, it was a conducted a survey to millennials in addition to research about them (Donnelly and Scaff 2013).

(McKinsey&Company 2017) stayed that the payoff of e-commerce will be worth the investment and only early movers will win. This creates a huge opportunity for those pioneers' retailers. Although, creating an e-commerce model is not enough to attract the new consumer if not having an omnichannel model will bring retailers to succeed as research confirms (McKinsey&Company 2017).

In addition, this new model will bring considerable changes in the supply chain and logistics, forcing retailers to introduce technologies as machine learning and artificial intelligence (Mehra 1999). As an example of this changes, offering click and collect will be a new method of delivering the product to the client in a more convenient way for both sides (Jara, et al. 2018).

Besides, it was studied some main "new" habits of the millennials when purchasing such as the usage of bots to buy, the increase on consumption of value-added food and private label and the change of store preference to those more convenient (Cernansky 2018).

Finally, apart from these topics mentioned before there were others also analyzed in this paper and it was needed the study of present and future trends of retail and if retailers should start adapting to it (Grewala, Roggeveena and Nordfältb 2017).

4. Methodology and research question

The problem of this thesis is to analyze the millennials, their purchasing behavior and what are they requiring when going groceries. After this analysis, it will be possible to answer the question for the work: Do food retailers need to adapt their business model to millennials?

The research methodology relied on the survey done to consumers of food retailers with a focus on millennials since this is the generation that is targeted in this study. The aim of the survey was for a better understanding of millennial´s consumer preferences and their behavior nowadays. There was no restriction regarding demography, although it was not possible to collect data from all the continents.

The chosen method to collect data was through a web-based survey which was distributed to a selected target as mentioned that met the requirement of being a consumer of a food retailer either online, offline or both channels. The questions were asked for the respondents to answer based on the practices they personally experienced when going to shop groceries. The survey was shared through different social media such as LinkedIn, email, Facebook groups targeting millennials, between others. The survey was answered by 91 consumers, although for the final analysis only full responses were considered making the final sample size of 64. Thirty-nine respondents were millennials- aged between 24 and 34 years old. However, 25 respondents aged between 18 and 23 years old- belonging to the generation Z- were also considered since they are very close to the age limit that some behaviors could be considered as the millennials.

The gathered data was analyzed, in addition to research about what are the main food retailers doing nowadays, as well as, the main present and future trends to finally make some conclusions.

Due to the type of topic studied, it was used a different approach in the structure. Along the research question and development of it, it was included some literature review to make the study stronger.

5. Analysis of the business model of a food retail focus on millennials.

Millennials

For the first time in the history of food retail, five distinct generations of shoppers- Silents, Boomers, Generation X, Millennials and Generation Z (Appendix 2)- are in the grocery's aisles, each one with their characteristics and requirements that influence shopping behaviors.

However, this research will be focused on the main consumer, millennials. (EY, EY 2015) established that, by 2025, Millennials will compromise three-quarters of the global workforce. In 5 years from now, millennials average age will be 37 years old that is considered the age of the main consumer in groceries. According to Exhibit 1, ages between 25-34 years old and 35-44 years old tend to spend the most on food.

Millennials also represent an inflection point in the way retailers offer their business, meaning millennials demand more technology, speed, convenience and variety as never before.

Millennials account for about a quarter of the world´s population and today they represent the largest generation as Exhibit 2 shows. For instance, millennials comprise 17.2% of the people in Japan, 17.8% in Spain, 23% in France -expected to represent half of the active population in 2015- and 16.9% in Italy with the smallest share of millennials of any major economy (Tilford 2018).

How they shop

According to a survey done by Forbes to the Millennials (GrandeConsumo 2017), 73% of them use social networks or corporate websites to communicate. Mobile devices are their primary way to communicate and 62% are still loyal to the brands if they are capable of establishing an emotional relationship with them.

According to the study "Tendências de consumo: Geração Y - Millennials" done by AgroCluster Ribatejo to 5,000 Portuguese, Spanish, French, English and North-American millennials this generation is the most careful with the composition of food, valuing the health and wellness. This last will force brands and retailers to adapt their offer to products with less salt, sugar and processed meat.

E-commerce

By 2025, online grocery sales are predicted to be 20% of the total groceries sales (Danziger 2018). The consumer demand for groceries online has been increasing in the last years, especially on those countries' leaders on sales online as the U.S, UK or France. For instance, in the UK online has been growing at 10 or 12 percent for many years especially on millennials and families (McKinsey&Company 2017). These findings let us set the first hypothesis (H1): *The majority of the millennials consider buying their groceries online.*

Nielsen predicted for 2022 that online sales would increase to 400 thousand million euros that represent 10% to 12% of total sales of FMCG. China and the United States will be referenced in this topic representing 60% of the total online sales (Grandeconsumo 2018). The penetration of mobile devices is one of the main "drivers" of this increase.

According to a survey done by (Galante, López and Munby 2013) to more than 4,500 European consumers in France, Spain and UK which searched if the payoff of e-commerce will be worth the investment, the answer that Mc.Kinsey found out is yes and only early movers will win. Although, (Galante, López and Munby 2013) stated one problem that online retailers might suffer: selling online means taking on additional costs- labor, delivery and fuel- that are higher than fees customers are willing to pay for delivery. For this reason, is not enough for retailers to offer an option online, if not the proper, outstanding value proposition, relentless focus on profits optimization and a willingness to place big strategic bets.

When we talk about selling, offering an excellent customer journey is a must especially in this competitive and dynamic industry- food retail. If we think about the online customer journey, what replaces the store in a brick and mortar experience is the website. According to (Leen, Thurasamy y Omar 2012) first impression and the website interface features will create trust and help millennials to decide whether further patronize the site. Then, there must be a considerable investment from the retailers to create a perfect "store website" to offer the best customer journey.

However, this is not enough to retain the customers. Any convenient in the other stages of the journey is almost a guarantee of losing the customer forever. Patricia Orsini- eMarketer Senior Analyst- explained that shoppers are becoming more comfortable with ordering online in general, and grocery is part of that.

Finally, it is important to say that consumers are not willing to sacrifice the quality, the range of products and price of their brick and mortar purchase to shop online.

Click and collect

In 2017, click&collect continues to grow with 49% of European consumers have used this service compared to only 14% in 2014. In addition, one in four shoppers made additional purchases in-store when picking up their groceries (JDA 2017).

Click and collect method offers benefits to the customer and the retailer. The customer is willing to buy online and pick-up their groceries at the store because it brings convenient.

Retailers will also avoid the high delivery costs, making the customer´s purchase cheaper and reduce operational costs. But there is also another main reason why retailers are investing in the click and collect and is that they can also encourage the customer to make an unplanned purchase when picking up their groceries (Deloitte 2015).

As mentioned, might seem that click&collect is a win-win for retailers and consumers. But this model needs a deeper analysis concerning cost-benefits. Every square meter spent to storage click and collect purchases could be used for display and any employee in charge of collect will not be able to assist consumers at the store (Deloitte 2015). In conclusion, retailers should consider how best to structure this click and collect model since new generations could require this service. This leads us the formulation of the second hypothesis (H2): *The majority of the millennials consider a great deal the service click&collect.*

Online marketplace

When thinking about a marketplace (Appendix 3), it is possible to associate it with a type of e-commerce that brings more competitive prices, offering the client the possibility to select from a more extensive catalog.

Nowadays, Carrefour, Walmart and Tesco offer their online marketplace, especially for non-food products. Brands already introduced the online marketplace concept mainly for the categories of home, technology and clothes.

The question is if big retailers will also consider introducing this type of e-commerce to food products in the near future. If we think about the increase in investment in private label products of these retailer brands, introducing an online marketplace will bring direct competition to them that could not generate positive profits. Although, will be a matter of analyzing and hear the customer to know what they prefer and want, and then adapt the business to it. This leads us to formulate the third hypothesis (H3): *The majority of the millennials will trust online marketplace for doing their groceries.*

The importance of being omnichannel and offer an experience

In the era of the technology where the big players are mostly going online, to compete food retailers must provide an excellent offline and online experience. Choosing to be only a brick and mortar retailer will not be enough on the future since more and more customers are claiming for convenience.

Nowadays, customers can shop 24/7 from anywhere. Those retailers that do not offer the possibility to the client to have this availability whenever and wherever they want will might start to lose clients since they will be substituted for another competitor. In addition, e-commerce can offer deeper product assortment since there is “unlimited” space that is well suited for stock-up and specialty-needs (Nielsen, The future of Grocery 2015).

Amazon´s decision to create a physical store- Amazon Go (Appendix 4)- and the acquisition of Whole Foods are the clear example that even being the strongest online retailers is not enough to satisfy today's customer. Furthermore, the acquisition of Jet.com- one of the fastest growing e-commerce companies in the U.S.- by Walmart emphasizes the theory that being the leader in only one channel will not succeed. If this is not enough, JD.com and Alibaba- big online players in China- are investing in thousands of physical stores to be opened in the following year.

McKinsey estimates that in-store sales will still make up 75 to 85 percent of retail sales by 2025 and saying this McKinsey expressed that the physical store is no longer just a place to buy products. This leads us to formulate the fourth hypothesis (H4): *Millennials are looking for an omnichannel experience.*

According to (Baker, et al. 2018), understanding what each customer value in each channel and how that affects what they are willing to pay is the key challenge for pricing teams today. Although (Baker, et al. 2018) states that those retailers that can differentiate prices correctly will increase their growth by two to five percent.

Today, however, offering the right product, at the right place, for the right price is no longer a differentiation factor. Today the customer is looking for an experience, an experience more engaging and personalized than before. Offering a unique experience for each client will be the major challenge of the next years. In here is where data mining plays an essential role since by doing data analysis retailers will be able to know their clients, know what they like or dislike and with this information offers a more customized product and experience (Nielsen, The future of Grocery 2015). In addition, using data retailers can provide targeted information and don't bombard with generals' campaigns that is not proper to that type of consumer. This leads us to formulate the fifth hypothesis (H5): *Millennials are looking for an experience when doing their groceries.*

According to (McKinsey&Company 2017), innovation could help to bring a better experience and engage customers. Having a multichannel experience is an example of making the shopping experience more attractive to the customer.

And this is precisely what Hema store is doing (Appendix 5). In this "new retail" model, technology and data are used to merge online and offline shopping offering a more flexible and efficient shopping experience looking like a traditional store.

Logistics

Thinking on an online future, where 20% of total grocery sales will be online charging a delivery fee is like today charging only for the customers to enter the store. Free delivery could be seen as a must in the near future and this service will start being more and more required from the customers and to do so, this will be a service needed to maintain competitive on the market. This leads us to formulate the sixth hypothesis (H6): *Millennials will change to a retailer that offers free delivery.*

When the retailer is offering an online service, the delivery of the products is part of it. Saying this is not fair for the customers to be asked to pick up their groceries at the store- if they do not want to pay for the shipping fee-, cause at the end retailers are destroying the benefit of the e-commerce, the convenience. Here comes the new challenge for the retailers, trying to find the business model that will not pass the cost of the delivery to the client.

It is almost impossible to think about using old logistics models to reach free delivery. However, the evolution of artificial intelligence (AI) and machine learning (ML) will help to fulfill this new requirement from the customers. Logistics teams work with a wide range of complex tasks and input data to make the best decisions. In practice, according to (Forbes 2018), workers often require as minimum 10 minutes to gather the needed information. However, with AI or similar types of tools, employees can automate the analysis and do it in a matter of seconds.

According to Forbes, AI and ML can crunch the data and then present a range of scenarios for optimizations. With sophisticated tools that continuously learn and improve, professionals will be able to make better and up-to-the-minute decisions as well as more informed longer-term strategic choices.

Natural disasters and employee strikes can affect the course of a company logistics. AI can be trained to learn from contingency plans that can correct actions in the future. AI can reroute trucks to a different distribution center in case the weather strikes the original one, using information from the past disruption to suggest a new route (Utermohlen 2018).

There must exist better research about how third-party companies, such as Uber Eats or Glovo, could solve, partially or totally, the logistics issue. These companies have started some time ago and there is still some analysis to be done on how they might influence this topic.

Supply Chain

As mentioned in logistics, ML and AI also make it possible to detect a pattern in the supply chain that quickly identifies the most influential factors to a supply network´s success. ML is discovering these new patterns without needing manual interventions.

(Columbus 2018) established some ways where machine learning is remodeling supply chain management.: ML algorithms can analyze large data set fast, improving demand forecasting accuracy; ML shine at visual pattern recognition, creating many potential applications in physical inspection across an entire supply chain network. For instance, IBM Watson platform was able to determine if a shipping container or products were damaged time and recommend the best corrective action to repair the assets.

Companies are extending the life of key supply chain assets including machinery, engines, transportation and warehouses equipment by finding new patterns in usage data collected via InternetOfThings sensors.

The change in customer preferences is adding complexity to the supply chain behind the new business model of food retail. It will be discussed later a new possible layout of smaller and more convenience stores, although this implies higher costs to run it. Applying technology to this system could be a good strategy to try to embrace technology. For instance, Walmart robotic pickup center in Oklahoma City is a clear example to this. It is using the best of supply chain automation, usually designated for some large warehouses in the suburban to fulfill the fresh, frozen and packaged weekly customer shop (McMahon y Leonard 2017). AI can help supply chain practices taking operations from reactive to proactive, planning from forecast to prediction, processes from manual to autonomous and services from standardized to personalized (IBM and DHL 2018).

As part of the introduction of the Internet or e-commerce to the original retail business model, comes the possibility of disintermediation or a significant effect on intermediaries. Is likely that the role played by intermediaries will be reshaped and therefore new forms of intermediaries and distribution channels will emerge. With the business being completely online, there will not be a physical intermediate- store- however, the website used to sell products will take place. This platform will inform and offer value-added. Saying this, with the elimination of the store, in addition to possible disintermediation, larger warehouses will need to be created to satisfy customers orders. The new channel could be thought as shown in Exhibit 3.

Alexa, bots.

Last June, Carrefour and Google became partners to innovate on a new distribution model for customers in France which will be available early 2019. This partnership consists of allowing customers to buy their groceries through Google Assistant like Google Home that will recognize the references commercialize by Carrefour, including fresh products. This partnership will also be available in Google Shopping and later at YouTube that will link the products. Walmart did not stay behind and signed a partnership with Google last August (Perez

2017). Specifically, consumers will now be able to use Walmart's "Easy Reorder" feature through an integration with Google's shopping service, Google Express (Appendix 6).

This leads us to formulate the seventh hypothesis (H7): *Millennials are willing to try voice assistance.*

Many reasons make voice assistant convenient for buying or sell groceries products, but (Bryson 2017) established the following main ones. When a client realize that is running out of a specific product, is much easier for him to say "Siri, buy toilet paper" than finding a pen and a paper or open an app. Moreover, retailers had the opportunity to inspire purchases indirectly when consumers turn to their voice assistant for dinner and recipe ideas. For instance, they can jump in with suggestions that are personalized to each dietary customer requirements and based on products they tend to buy often.

On the other hand, (Feibus 2018) explained that people are not using Alexa as predicted. According to U.K digital marketing firm Code Computerlove, a survey of people who own smart speakers found that only 7% have used them to make an online purchase.

Big data

Nowadays, thanks to the evolution of technology new types and sources of data are available. With this, retailers can have more and deeper information about customers and the market leading to better analysis, conclusions and decisions.

Thanks to the internet of things, apps and e-commerce, retailers can take advantage of more consumer-behavior data than they have ever had before. For instance, retailers can check how customers moved and interact while purchasing, how they move in the market and how they behave across different channels- offline and online.

An IT analyst firm Gartner estimates that there will be 20 billion devices connected in the "Internet of Things". Only this will create a wide amount of data. However, this data is complemented with offline data collected from RFID and GPS tracking, integrated

offline/online experiments providing exogenous variation, eye-tracking data, between others. All these started to be part of the marketing scientists use for customer-level understanding and firm-level optimization.

We have been listening to what is Big Data about. Big Data in retailing exploits in five-dimensional space: across customers, products, time, geospatial location and channel. (Bradlowa, et al. 2017). In retailing, the ability to track new customers and to link transaction over time is a key. Nowadays, loyalty programs are the most common way to create this track. When analyzing in-store consumer´s movements connected with their purchases, time dimension is a must. Introducing the variable time to the database allows real-time decisions. In addition, when the customer´s geospatial location is tied to the CRM database of a firm, retailers can increase value on the data analysis. With the introduction of new channels of purchase, appears a new necessity of analyzing omnichannel data.

In conclusion, big data today is more than adding new customers to the database. When retailers can multiple people x products x time x location x channel, they create big data.

There is a new challenge for Big Data that is the need to create better data. What is happening to retailers is that the data of each customer is "old". The data does not reflect the needs and wants of the customer anymore. Thus, the retailers are facing a mixture of "good data"- recent data- with "bad data" -old data-, and the mixture of both makes the BI system poor. Then, more data don´t solve the problem, in fact, exacerbate the problem. Saying this there is a need for creating new sources of data by linking many different categories of data: sales data captured from enterprise systems, customer-level data and location-based data.

There is always something else to improve better data models that is to introduce machine learning to the database and try to predict some consumers behaviors. Big data could be very useful, however, there is a need from retailers to be careful how they are using this data in a

way that balances out the personalization-privacy paradox and stays under new privacy protection laws.

Food and Habits

"Value-added" food.

We have been seeing a wide change in consumer habits and preferences and this is impacting the way retailers think their strategy. There has been an increase in the value that new generation gives to free time or leisure activities and with this, there has been a decrease in the time spent to cook at home receipts.

For this reason, food retailers started to offer "value-added" items- peeled, precut, cooked or precooked food- in their stores such as cooked chicken, heat and eat, meal kits, soups ready to take, between others. According to (Hertel 2017), prepared food is likely to grow 10% in 2018, which is more than five times the growth-rate expected from traditional restaurants.

This leads us to formulate the eighth hypothesis (H8): *Millennials are more willing to buy prepared food in the supermarkets.*

In addition to this, there is an increase in the consumption of more fresh and healthy options and is increasing the number of people consuming bio products.

This leads us to formulate the ninth hypothesis (H9*): Millennials are looking for bio products in the supermarkets.*

Private label

Nielsen established that there is a new retail revolution underway- the development of private label- and it is going to affect the food industry across the globe over the next five years. This will present new challenges for brands and manufacturers across the globe. The largest markets of private labels products are found primarily in the more mature European markets. In contrast, private label has still room to grow in North America, where penetration is still low. As shown in Exhibit 4, Germany, Netherlands and Spain are the countries where private label share is the

highest (Nielsen, Nielsen 2018). This leads us to formulate the tenth hypothesis (H10): *Millennials are consuming private label products.*

Many years ago, there were products with more quality than others. Nowadays, all the products offer quality. Today, brands focus more on issues like sustainability and the environment. The quality is something that in most of the brands is intrinsic, it is already assumed.

According to a study done by (Nielsen, Nielsen 2018), many consumers see private-label brands as being substitutes to multinational brands. In addition, U.S showed a reversal performance among private-label and manufacturer-branded products over the past years (Exhibit 5). While manufacturers of all sizes saw a flat or positive performance in the fourth quarter of 2016, store-branded products took the lead a year later, growing at 2%.

Shopping less, more frequent and tendency to buy in smaller shops.

Consumers are replacing monthly stock-up grocery shopping trips with smaller and more frequent grocers. According to the survey conducted 41.9% of the millennials go to buy their groceries weekly. This turns the average tickets cheaper than before. In some cases, shoppers buy just for the meal they plan to have on a specific day. Contactless payments, self-checkouts, cash machines and mobile payments all help to encourage the customer to shop easily and buy little and more often.

According to Nielsen, across all regions, smaller stores are posting higher growth than larger ones. Nielsen Retail Measurement Services data highlights that smaller stores now account for 25% of FMCG sales. (Nielsen, The future of Grocery 2015) established that large stores have still sales volume advantage, but smaller shops are growing rapidly.

Small or convenient stores are bringing to customers, and especially new generations, something that holds real value, time. But that is not the only main reason for shoppers to start shifting to convenient stores. Location is another important issue. Having a store in an accessible location with good parking or good transport links is crucial for the new generation's

requirements. This leads us to formulate the eleventh hypothesis (H11): *Millennials are buying in small or convenient stores.*

6. Results and limitations.

Results analysis

A survey was created and distributed to customers, mainly millennials, and the outcome in addition to the study of market trends provide the evidence that there is a need to adjust the business model of food retailers if they want to remain competitive for millennials.

First, the results conducted about millennials tell us that 27.84% said that what they value the most when choosing a food retailer is price and promotions, followed by 19.59% value the variety of products and 14.95% the quality of fresh products, being the less value the loyalty card program with 0.52%. This show that for millennials when buying there is still a great focus on price/promotions and assortment. 42.19% of the millennials go weekly to buy their groceries while 12.50% stock-up with some things and buy while is needed. 71.88% answered they have used at least once a self-cashier and 21.88% try to pay always through this way.

Regarding H1, this hypothesis will be accepted since millennials answered on average, on a scale from one to five (being 1 the minimum and 5 the maximum), that they consider 3.31 on doing their groceries online and they consider 4,02 doing their groceries of non-fresh products online, while only 2.46 consider doing the purchase of fresh products online. In addition, 53.13% and 17.19% are moderately and extremely likely to change the retailer to one that is offering an online purchase channel. For this reason, food retailers have great incentives to invest in an e-commerce platform, especially for those non-fresh products.

The third hypothesis needs to be rejected since only 10.94% of the millennials consider a great deal to pick-up their groceries at the store, 20.31% consider a lot and 34.38% consider it on a moderate amount. The main reasons for them to choose pick-up their groceries at the store are: 29.55% don´t want to pay for the delivery fee, 26.14% don´t want to stay at home for receiving

the delivery and 22.73% don´t want to wait for the delivery. It is not that obvious that millennials choose the click and collect service although might solve some millennials issues when comparing to the delivery offer. This shows that there is some time needed to see if this service will be chosen by more people.

When talking about online marketplace, 46.88% of the millennials expressed that they would trust online marketplace for those products of brand A and non-fresh products and 26.56% said they don´t know if they would trust them at all. But it is still early to anticipate what will happen and there is not enough data to predict if retailers will consider introducing online marketplace into food and fresh products or what will happen to this type of market.

Hypothesis four is accepted since 78.13% of the millennials answered they are extremely or moderately interested in a retailer that offers a good and personalized multichannel experience. In addition, 53.13% of the millennials are moderately likely to change to a retailer that offers an online channel and 17.19% are extremely likely. In conclusion, retailers should include an omnichannel experience in their model. 50.6% of the millennials answered that they won´t be willing to buy the fresh or perishables products online mainly because they want to experience and "touch" the product before buying. This means that the perishables products will drive the consumers to buy at the physical stores rather than online- at least for the next years leading retailers to offer an omnichannel experience.

According to the survey, 33.8% of the millennials said that they do not enjoy shopping their groceries. This shows that there is something on the experience that needs to be changed. 40.63% of the millennials expressed that they would like to be offered some experimental experiences those days they have some free such as events, inspiration, education, shop in shop- while passing through their customer journey at stores. This will be the way to attract customers to the brick and mortar store.

How logistics are managed will need some adjustments since 76.56% of the millennials answered that they are extremely or moderately likely to change to a retailer that offers free delivery. However, 31.25% answered they are moderately likely to spend a bit more to be offered free delivery, on the other hand, 31.25% expressed they are moderately unlikely. Saying this, offering free delivery might be a chance to gain new clients. This means that hypothesis six is accepted.

56% of the Millennials expressed that they are willing to try voice-activated ordering. This result shows that there is a tendency to buy products through these devices. This leads us to accept hypothesis seven. However, all the millennials said that they have never done a purchase using voice assistance and 74.6% said that the main reason is that they are not sure that voice assistance offers them the best deal. In conclusion, voice assistant companies in addition to the retailers should convince customers that their algorithms search for the best deal and make sure clients use them to buy their groceries. It is needed some time to see what companies will do and how customers will react to this type of purchases.

Hypothesis eight is accepted since 54.69% of the millennials answered they would like that supermarkets offer value-added food if the price can compete with the one of cooking food at home. 46.7% of the millennials have consumed a prepared meal last month and 26.56% have bought more than once. This shows the importance of offering value-added food as part of the assortment.

The consumption of bio products has been increasing. 34.92% of the Millennials expressed that they consume bio products once a week and 26.98% consume two to three times a month. They are not the majority although data demonstrate that offering bio products might be a must in the near future.

When discussing private label products, hypothesis ten is accepted because 44.26% of the millennials expressed that they always consume private label products and 45.9% consume

sometimes. This represents that 90% of the millennials consume private label products. For this reason, in addition to that these products usually represents big margins to the company, food retailers should include these products in their model. The main reason that millennials expressed to choose private label is the price/quality convenience.

Finally, millennials changed the past frequency of going for groceries. 42.19% of the millennials go to buy their groceries weekly. Furthermore, 67.19% of the millennials choose to go for groceries to small or convenience stores and 44.78% of the millennials answered that they don´t choose hypermarkets due to being far from home and 25.37% said that small markets offer all they need. This shows that supermarket chains might rethink the layout and location of their hypermarkets and start opening stores closer to their clients.

Limitations

Although this paper attempted to provide relevant literature, conduct valuable research and analysis and provide useful insights, there are several limitations.

The research considers only millennials. To provide more valuable insights, other generations as generation Z and seniors should be cover. (LeeJMiller and Lu 2018) stays that Gen Z will compromise 32 percent of the global population in 2019, nudging ahead of millennials, who will account for a 31,5 percent share. However, for the study of this paper, the oldest person of Generation Z today is only 22 years old meaning they still do not represent a big portion of the total sales of a food retailer. Although, they might represent an important generation to be considered in the next years.

On the other hand, most of the European countries have a particular characteristic compared to the rest of the world. The old or senior population is increasing, and the retirement-age population will be larger than the working-age population in the coming decades (Catalyst 2018). For this reason, there might exist a limitation in how different practices studied in this paper could apply to these countries.

Besides, the research includes a significant sample although in order to provide more valuable and accurate insights a bigger sample should be consider. In addition, it might include millennials from other continents like Asia and Africa since it was only possible to collect data from Argentina, Portugal, Spain, Italy, Colombia, Brazil, Austria, Germany, Ecuador, France and Guinea Bissau.

Research may take into consideration some trends for the further future of food retail. Where the field goes will depend on newer emerging forces: virtual or augmented reality, robots, drones, driverless vehicles, 3D printing, smart houses, artificial intelligence, sustainability, between others. All these new terms, that still need to be tested by retailers, can have a tremendous positive impact on how consumers shop. According to (Grewala, Roggeveena and Nordfältb 2017) a possible consequence could be a more informed and engaged customer.

This thesis, even with the limitations, contributes to a better understanding of the millennial´s behavior and market trends that can drive some companies to change, at least partially, the way they are thinking their business model.

7. Conclusions

For millennials, price and promotions in addition to the variety of products are the main things they value the most when choosing a retailer. However, retailers should also focus on the quality of their private label and fresh products as mentioned before. Value-added food seems to be a hot topic and something that is starting to be considered more and more as part of the daily diet and life of a millennial.

It was analyzed that physical stores will continue to exist, especially for those perishable products, although retailers should increase their investment in their e-commerce platform and improve their logistics and supply chain using new methods as ML and AI to reduce costs of this new purchase method that will make them possible to offer more convenient ways of buying.

But being strong online will not be enough to satisfy the new generations. They are starting to ask for an omnichannel experience in where customers can choose the type of channel whenever, whatever and wherever they want. This in addition to experimental experiences at the store might also reduce the number of clients that do not enjoy going groceries. To know better who is buying, the correct use of big data will be a must on the retailer industry and might create an advantage over other players.

Finally, there is a considerable tendency on "coming back" to the past food retailer model. Meaning, customers are looking for more convenience stores, rather than hypermarkets, with the products they need for the day and choosing the online channel for those non-food products that do not need to be "touch" and usually weight and take a lot of space in shop bags. A new model could be though as an online channel, food retailers will be able to offer almost unlimited assortment online and choose those strategic products to place it at the store to be close to the client.

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9. Appendixes

Appendix 1

Brick and mortar (also **brick and mortar** or **B&M**) refer to a physical presence of an organization or business in a building or other structure. The term *brick-and-mortar business* is often used to refer to a company that possesses or leases retail shops, factory production facilities, or warehouses for its operations. More specifically, in the jargon of e-commerce businesses in the 2000s, brick-and-mortar businesses are companies that have a physical presence (e.g., a retail shop in a building) and offer face-to-face customer experiences.

Appendix 2

Silent: people born before 1946; Baby Boomers: people born between 1946 and 1964; Generation X: people born between 1965 and 1976; Millennials or Generation Y: people born between 1977 and 1995; Generation Z: people born in 1996 until today. (Pogorelc, A look at how different generations grocery shop [infographic] 2018)

Appendix 3

According to (Wikipedia 2014) an **online marketplace** is a type of e-commerce site where products or service information is provided by multiple third parties whereas transactions are processed by the marketplace operator. In an online marketplace, consumer transactions are processed by the marketplace operator and then delivered and fulfilled by the participating retailers. Amazon, eBay and Alibaba are clear examples of this type of market.

Appendix 4

Amazon Go: "Amazon Go is a new kind of store with no checkout required. We created the world's most advanced shopping technology, so you never have to wait in line. With our Just Walk Out Shopping experience, simply use the Amazon Go app to enter the store, take the products you want, and go! No lines, no checkout. Our checkout-free shopping experience is made possible by the same types of technologies used in self-driving cars: computer vision,

sensor fusion, and deep learning. Our Just Walk Out Technology automatically detects when products are taken from or returned to the shelves and keeps track of them in a virtual cart. When you're done shopping, you can just leave the store. A little later, we'll send you a receipt and charge your Amazon account."

Appendix 5

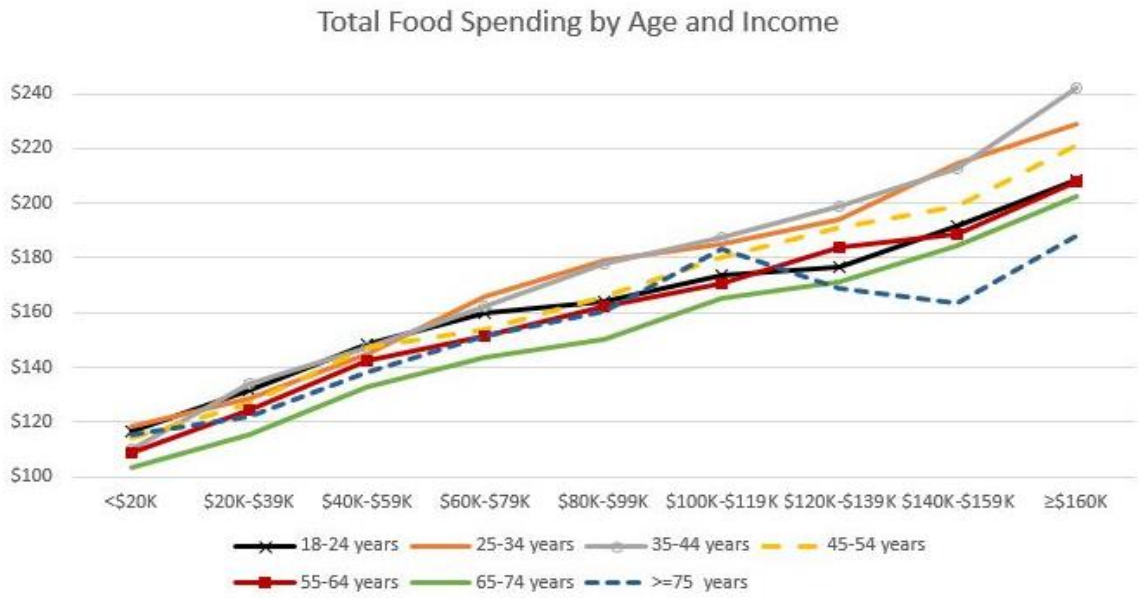
Hema store has also cracked a key problem of how to scale local deliveries, with each store able to fulfill thousands of orders a day in 30 minutes. Hema allows customers to shop from the comfort of their houses using a mobile app or they can order fresh food to cook it at home or have it prepared in the store in 30 minutes. As part of the customer experience, shoppers can pick out their own lobster or other shellfish and have it cooked up and ready to eat after finishing the shopping. The store itself looks like a normal neighborhood supermarket but Hema is more than that. Customers can scan a code on each product to have information or to finish the shopping through their electronic purchase. And one of the secrets for Hema is that user experience is enhanced through big data. Analytics offer up a personalized product page and machine algorithms plan delivery routes. The barcodes bring to Hema the possibility to employ a smart supply-chain management system. (NAJBERG 2017)

Appendix 6

Google Express is a delivery service powered by Google where you can shop from stores like Walmart, Target, Costco, Walgreens, PetSmart, and more — all from the Google Express app. Select what you want in the app and where you want to buy it from, pay for the items, then wait for your purchases to show up on your doorstep within one to three days.

10. Exhibits

Exhibit 1



As the figure shows, low income households all spend about the same on food regardless of age. People aged 65-74 years tend to spend the least on food regardless of income until the highest income categories at which point the oldest respondents spend the least on food. Households between the ages of 25 and 44 years tend to spend the most on food (holding constant factors such as household size, etc.)

Source: http://jaysonlusk.com/blog/2017/9/22/food-spending-by-age-and-household-size

Exhibit 2

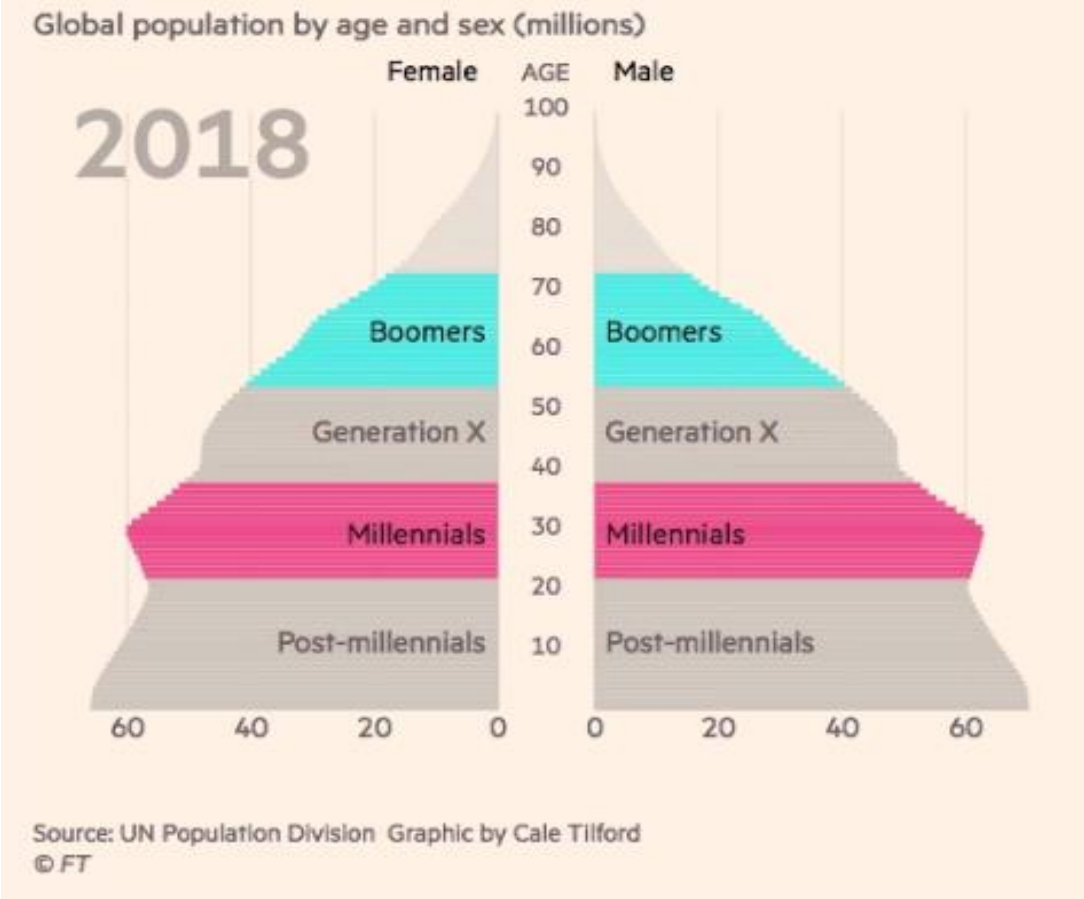


Exhibit 3

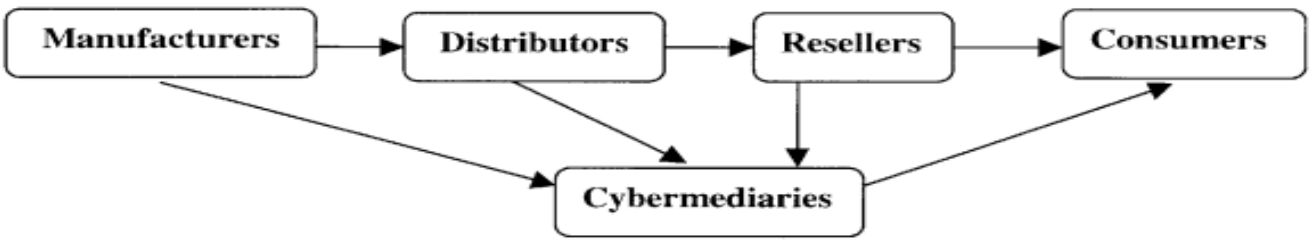
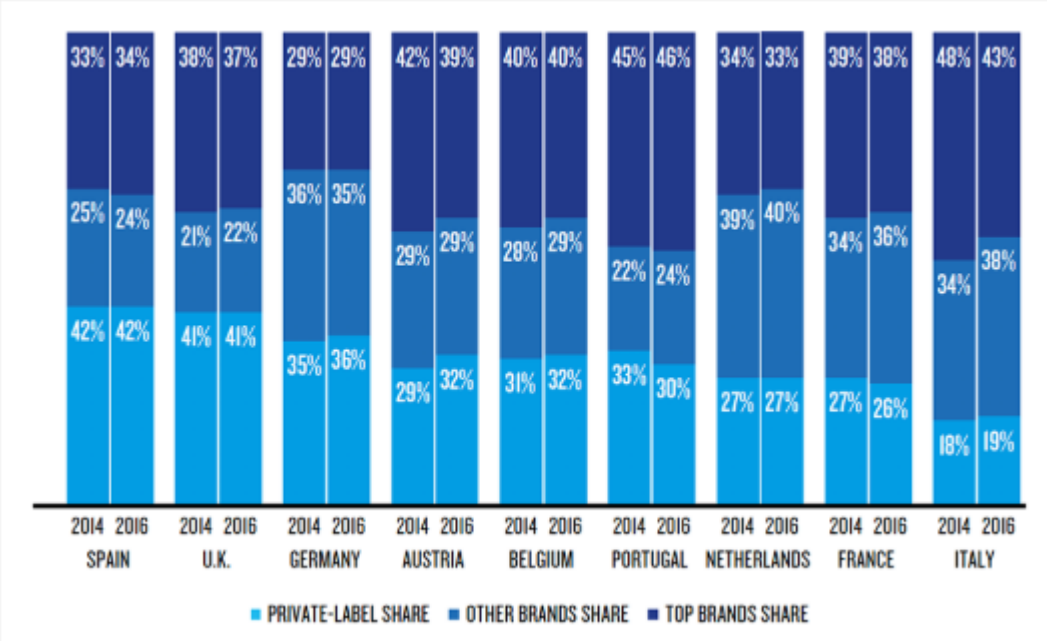


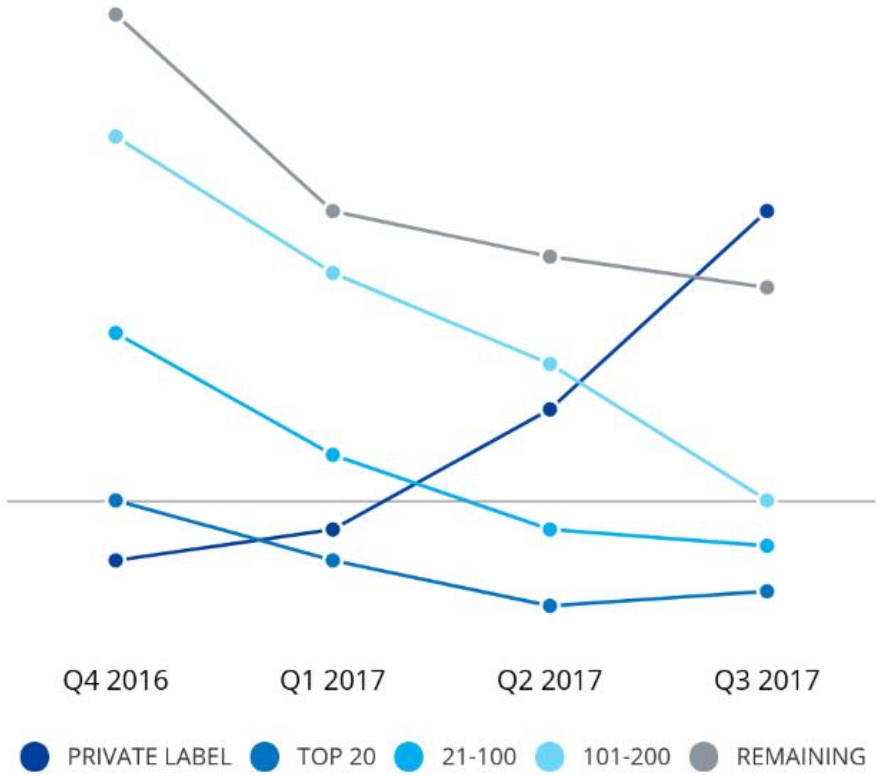
Exhibit 4

Market share of brands and private label in Europe



Source: https://www.nielsen.com/eu/en/insights/reports/2018/the-rise-and-rise-again-of-private-label.html

Exhibit 5



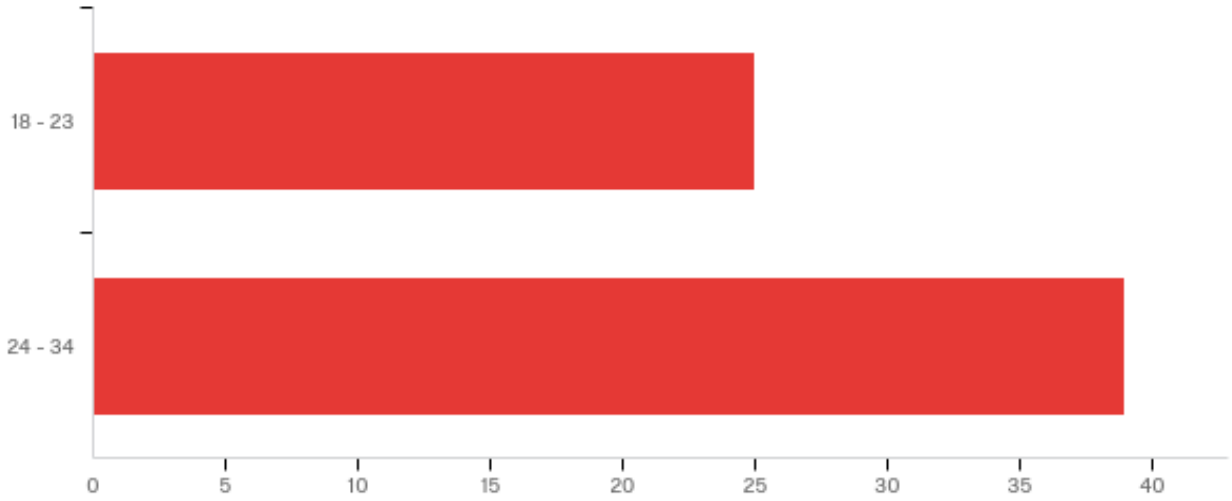
Source: https://www.nielsen.com/eu/en/insights/news/2018/private-label-brands-are-hungry-for-more-of-the-global-food-pie.html

Exhibit 6

Survey conducted

How do you behave when buying your groceries
December 31st, 2018, 8:35 am MST

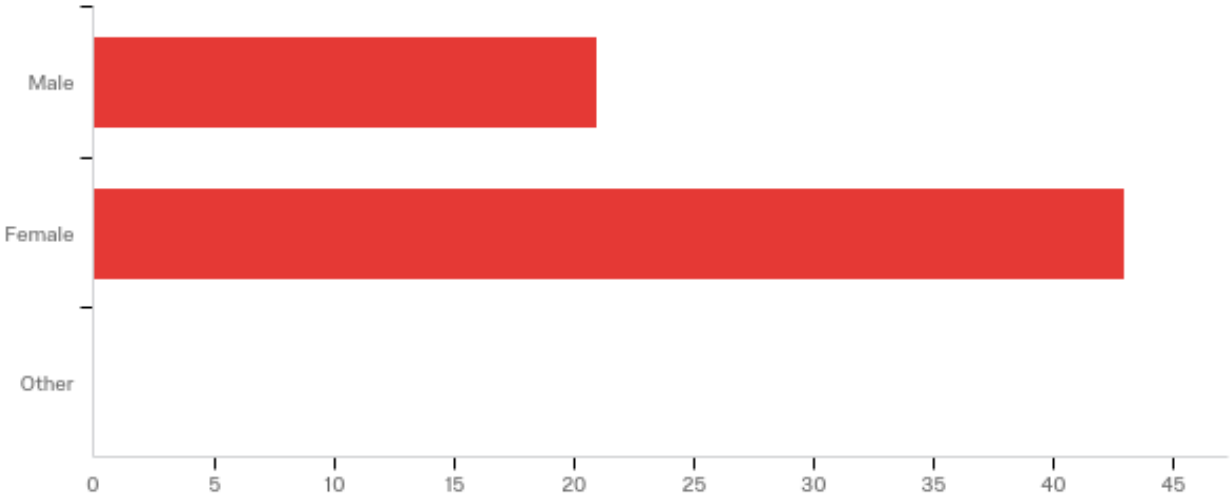
Q2 - Age



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Age	2.00	3.00	2.61	0.49	0.24	64

#	Answer	%	Count
1	18 - 23	39.06%	25
2	24 - 34	60.94%	39
	Total	100%	64

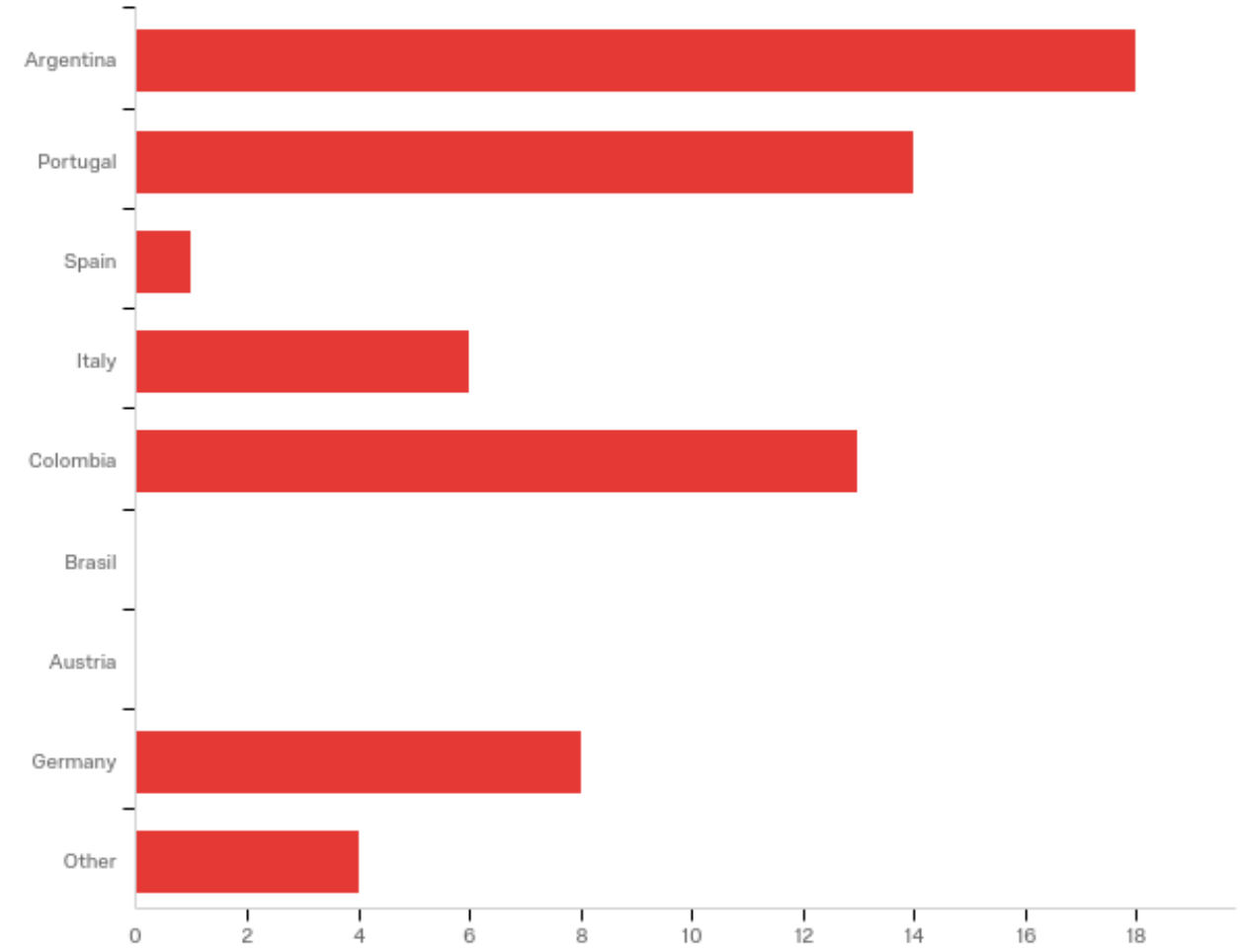
Q3 - Gender



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Gender	1.00	2.00	1.67	0.47	0.22	64

#	Answer	%	Count
1	Male	32.81%	21
2	Female	67.19%	43
3	Other	0.00%	0
	Total	100%	64

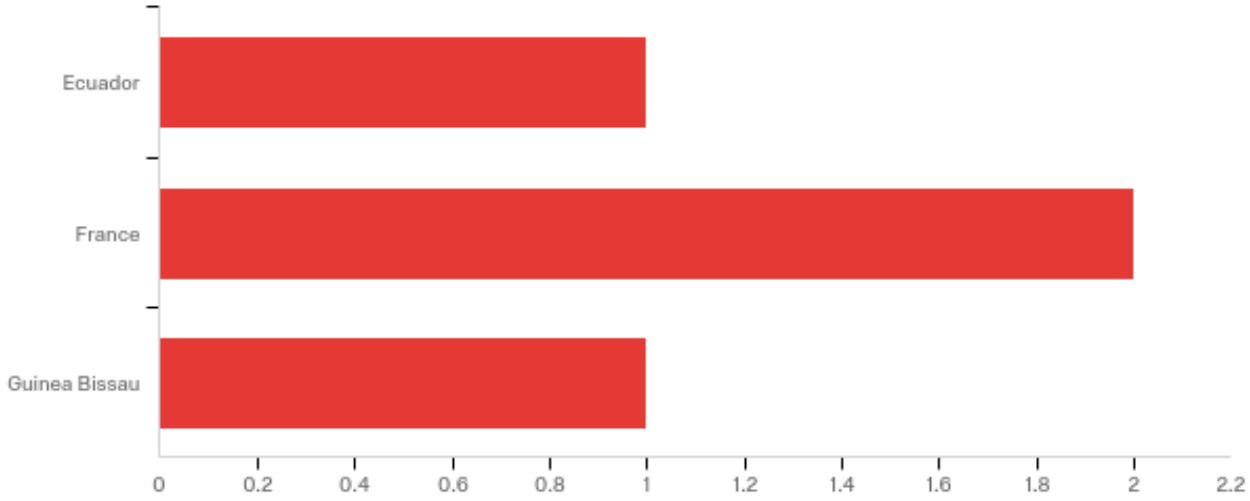
Q4 - Where are you from?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Where are you from? - Selected Choice	1.00	9.00	3.72	2.67	7.11	64

#	Answer	%	Count
1	Argentina	28.13%	18
2	Portugal	21.88%	14
3	Spain	1.56%	1
4	Italy	9.38%	6
5	Colombia	20.31%	13
6	Brasil	0.00%	0

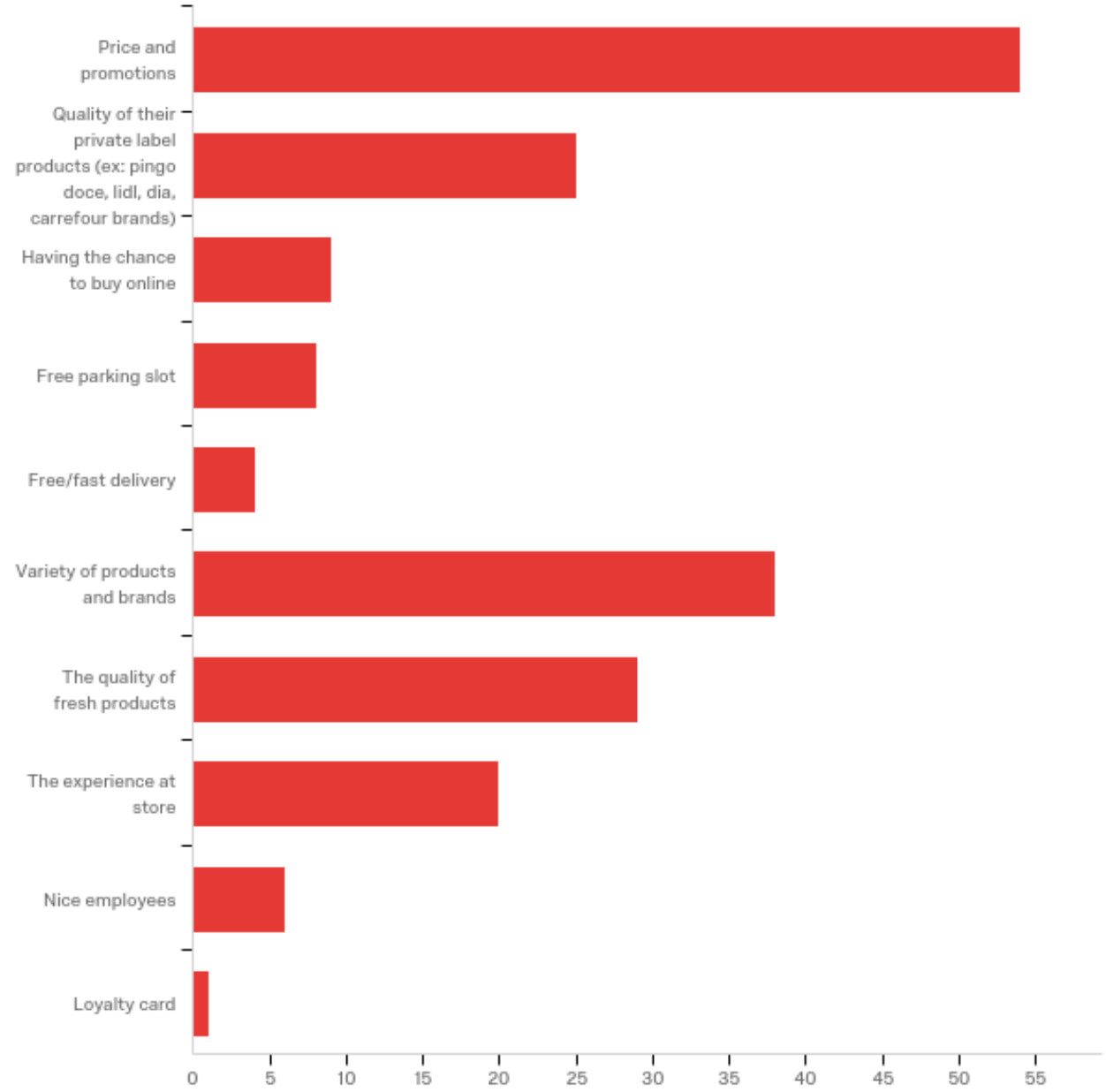
7	Austria	0.00%	0
8	Germany	12.50%	8
9	Other	6.25%	4
	Total	100%	64



Data source misconfigured for this visualization

#	Answer	%	Count
Ecuador	Ecuador	25.00%	1
France	France	50.00%	2
Guinea Bissau	Guinea Bissau	25.00%	1
	Total	100%	4

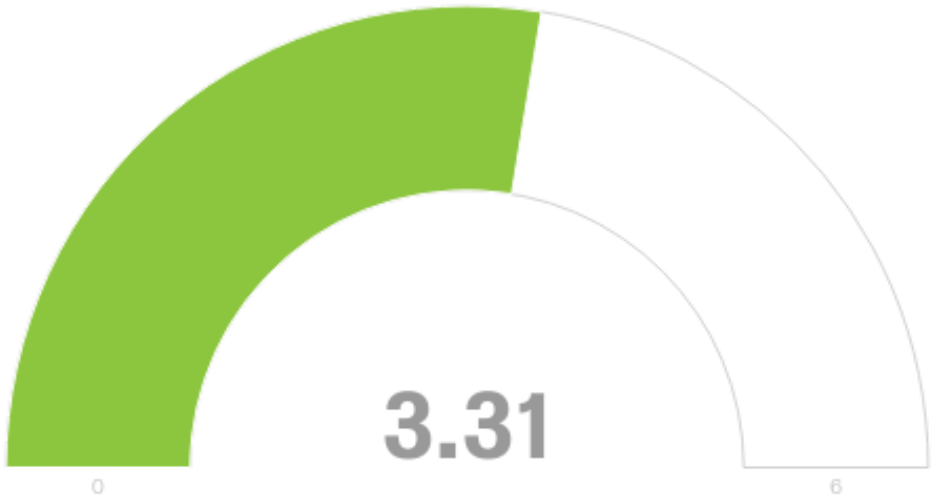
Q5 - What you value the most when choosing a food retailer? (you can choose more than one option)



#	Answer	%	Count
1	Price and promotions	27.84%	54
6	Variety of products and brands	19.59%	38
7	The quality of fresh products	14.95%	29
2	Quality of their private label products (ex: pingo doce, lidl, dia, carrefour brands)	12.89%	25
8	The experience at store	10.31%	20
3	Having the chance to buy online	4.64%	9

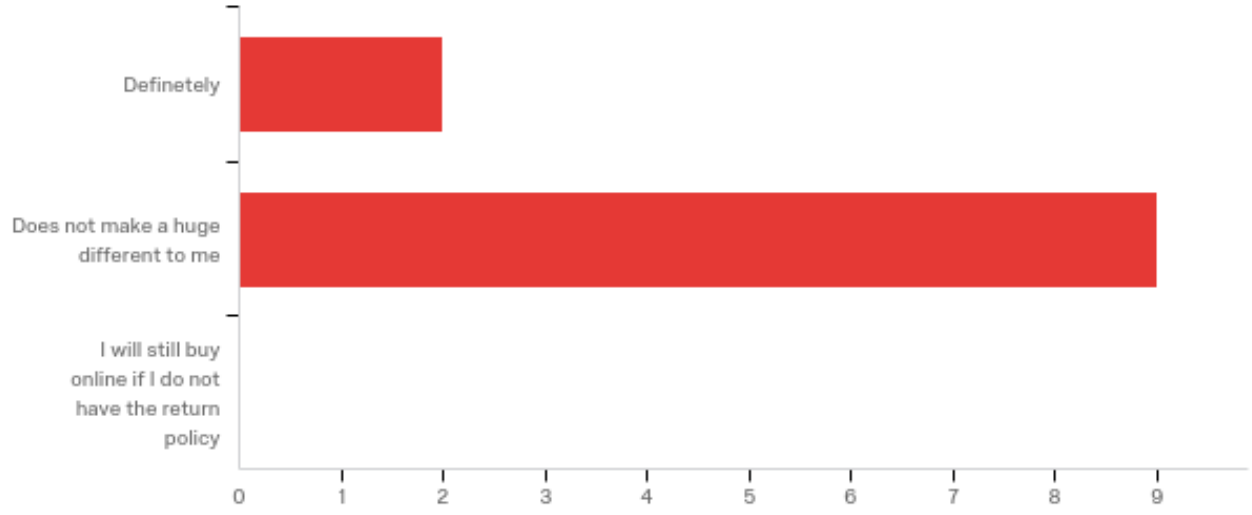
4	Free parking slot	4.12%	8
9	Nice employees	3.09%	6
5	Free/fast delivery	2.06%	4
10	Loyalty card	0.52%	1
	Total	100%	194

Q6 - Do you consider buying your groceries online?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	1	1.00	5.00	3.31	1.05	1.11	58

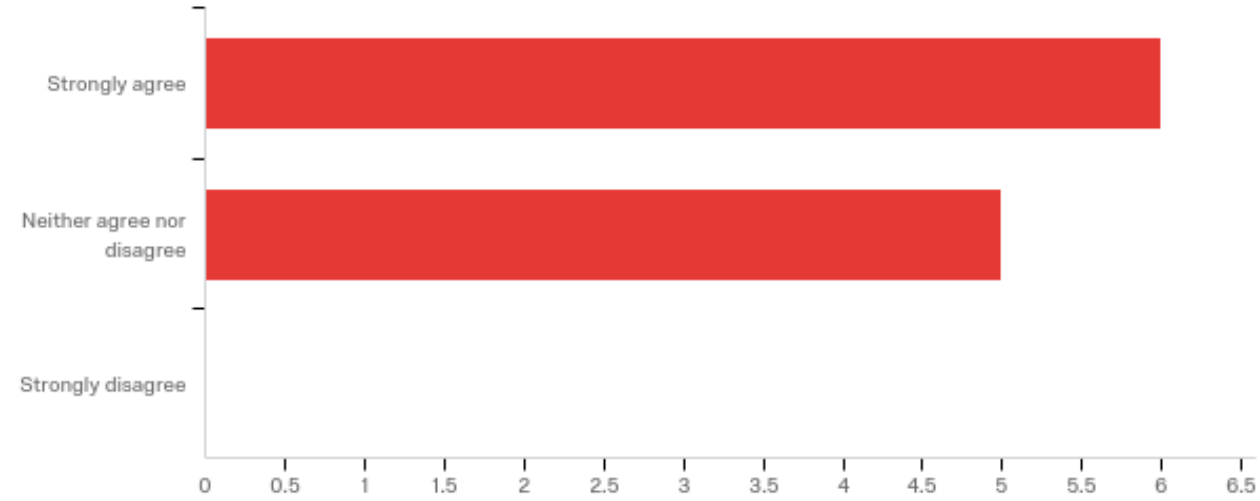
Q7 - And if you would be able to return the product when buying online, would you be more willing to buy it online?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	And if you would be able to return the product when buying online, would you be more willing to buy it online?	1.00	2.00	1.82	0.39	0.15	11

#	Answer	%	Count
1	Definitely	18.18%	2
2	Does not make a huge difference to me	81.82%	9
3	I will still buy online if I do not have the return policy	0.00%	0
	Total	100%	11

Q8 - Do you see yourself buying online in 5 years if the offer is convenient?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Do you see yourself buying online in 5 years if the offer is convenient?	1.00	2.00	1.45	0.50	0.25	11

#	Answer	%	Count
1	Strongly agree	54.55%	6
2	Neither agree nor disagree	45.45%	5
3	Strongly disagree	0.00%	0
	Total	100%	11

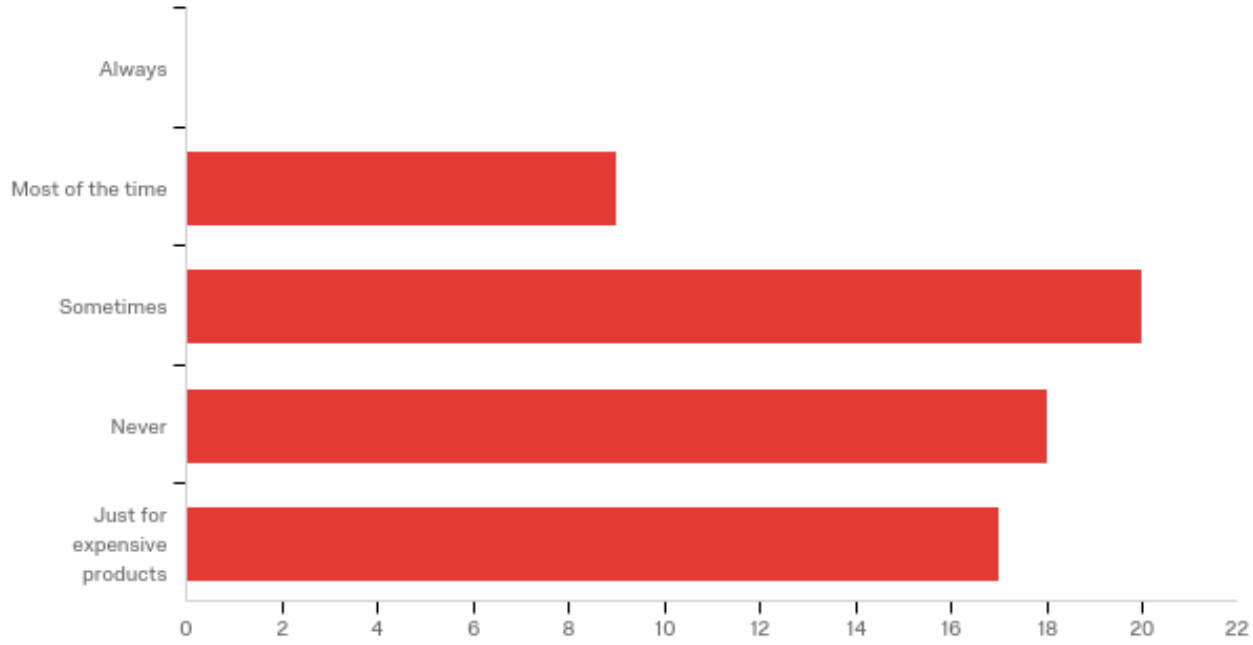
Q9 - How willing you are to make your groceries of the following categories online?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	fresh products (fruits, vegetables, meat or fish)	1.00	5.00	2.46	1.12	1.25	50
2	non-fresh products (yogurts, laundry, home, cleanings, cookies, etc)	1.00	5.00	4.02	1.12	1.25	63

Q10 - How much you imagine yourself making your groceries of non-fresh products online and continue going to the market for the fresh products?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	1	1.00	5.00	3.33	0.92	0.84	61

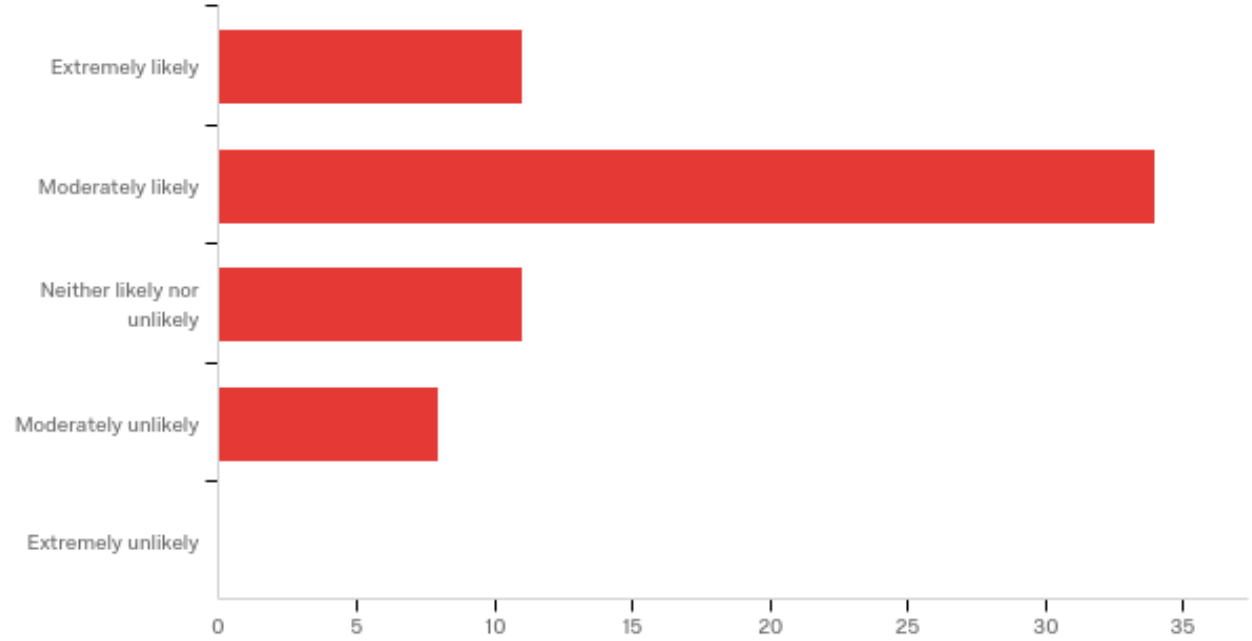
Q11 - How often do you check and compare prices or products online and end up doing your purchase offline?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How often do you check and compare prices or products online and end up doing your purchase offline?	2.00	5.00	3.67	1.02	1.03	64

#	Answer	%	Count
1	Always	0.00%	0
2	Most of the time	14.06%	9
3	Sometimes	31.25%	20
4	Never	28.13%	18
5	Just for expensive products	26.56%	17
	Total	100%	64

Q12 - Imagine you were doing your offline purchases in a regular retailer and now you want to start buying online because of the convenience, how willing would you be to change to a retailer that offers you this channel?

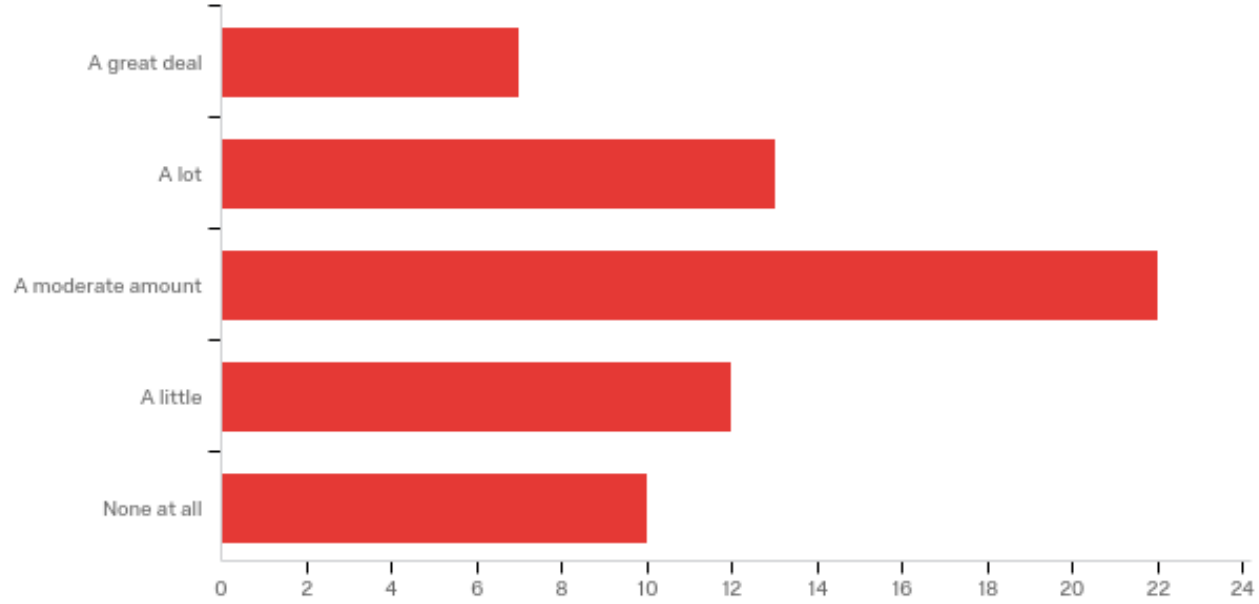


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Imagine you were doing your offline purchases in a regular retailer and now you want to start buying online because of the convenience, how willing would you be to change to a retailer that offers you this channel?	1.00	4.00	2.25	0.88	0.78	64

#	Answer	%	Count
1	Extremely likely	17.19%	11
2	Moderately likely	53.13%	34
3	Neither likely nor unlikely	17.19%	11
4	Moderately unlikely	12.50%	8
5	Extremely unlikely	0.00%	0

	Total	100%	64

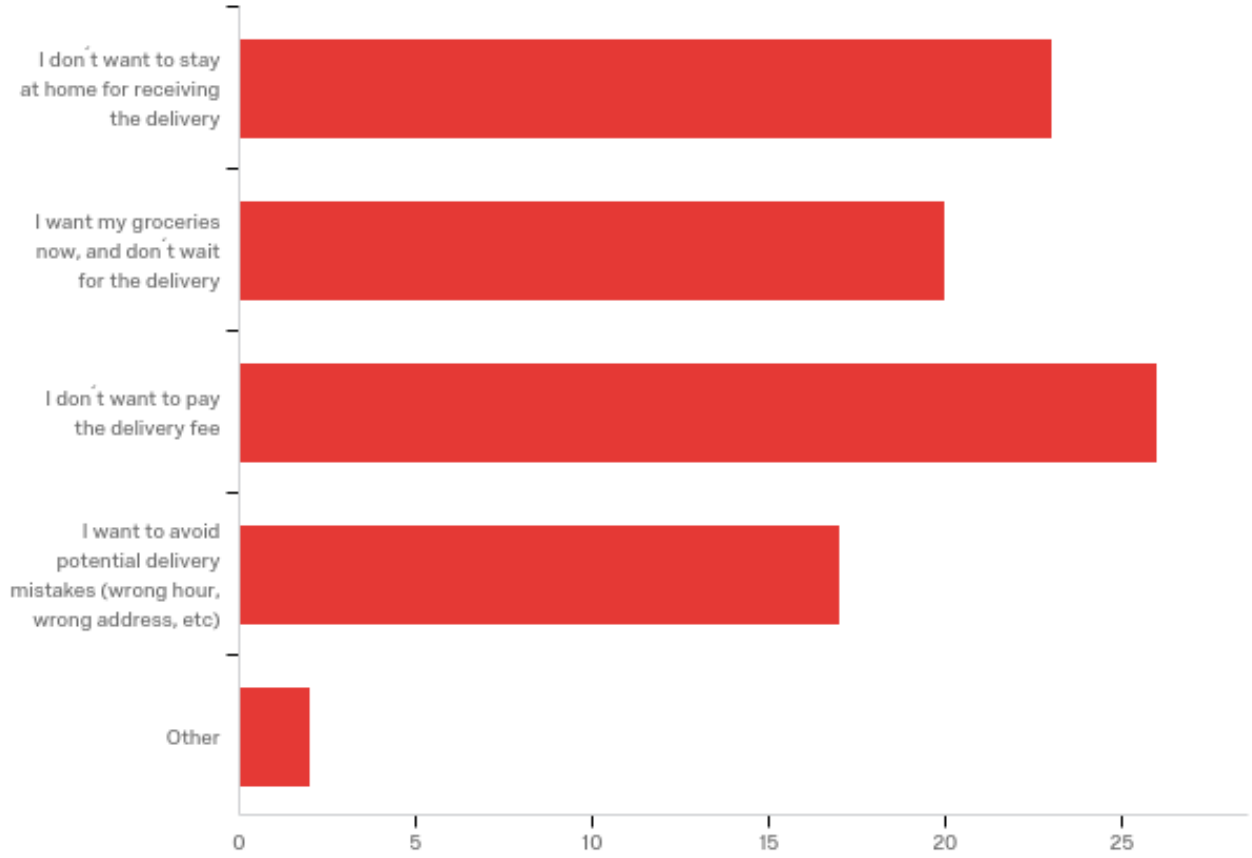
Q13 - How much would you be willing to pick-up your groceries at the store when you did the purchase online?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How much would you be willing to pick-up your groceries at the store when you did the purchase online?	1.00	5.00	3.08	1.20	1.45	64

#	Answer	%	Count
1	A great deal	10.94%	7
2	A lot	20.31%	13
3	A moderate amount	34.38%	22
4	A little	18.75%	12
5	None at all	15.63%	10
	Total	100%	64

Q14 - Which are the main reasons you choose to pick-up your groceries at the store: (you can choose more than one option)

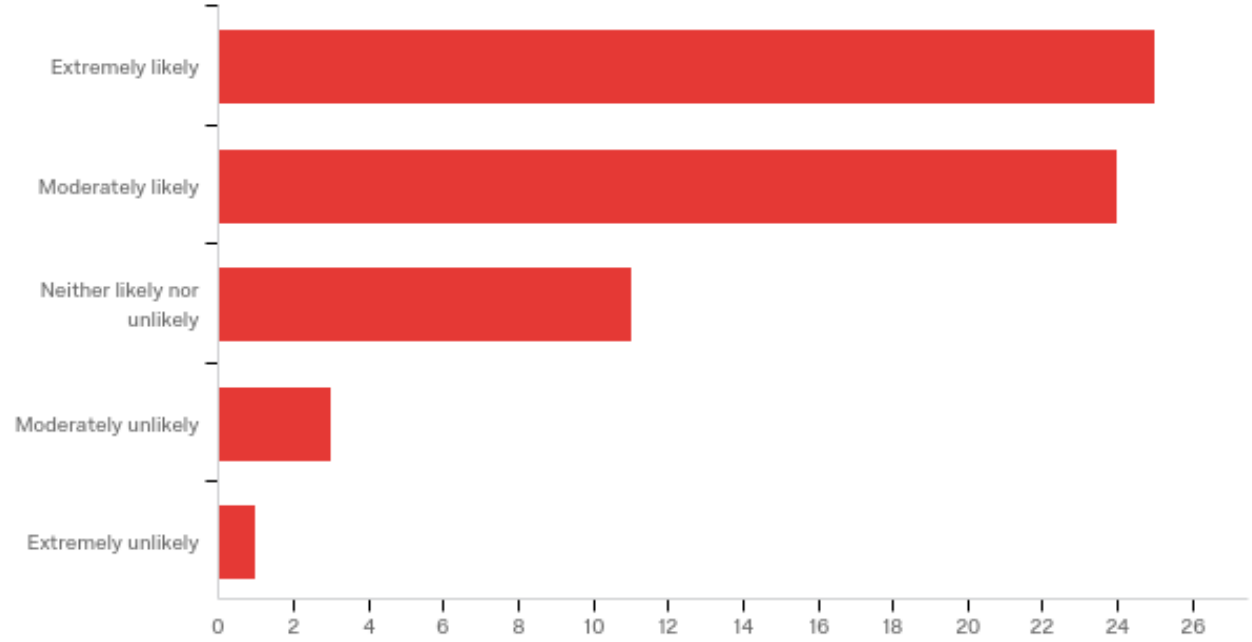


#	Answer	%	Count
1	I don´t want to stay at home for receiving the delivery	26.14%	23
2	I want my groceries now, and don´t wait for the delivery	22.73%	20
3	I don´t want to pay the delivery fee	29.55%	26
4	I want to avoid potential delivery mistakes (wrong hour, wrong address, etc.)	19.32%	17
5	Other	2.27%	2
	Total	100%	88

Other

Other - Text
I may not be at home, so I would pick them while I go home after work
Quiero elegir los productos frescos como frutas o verduras

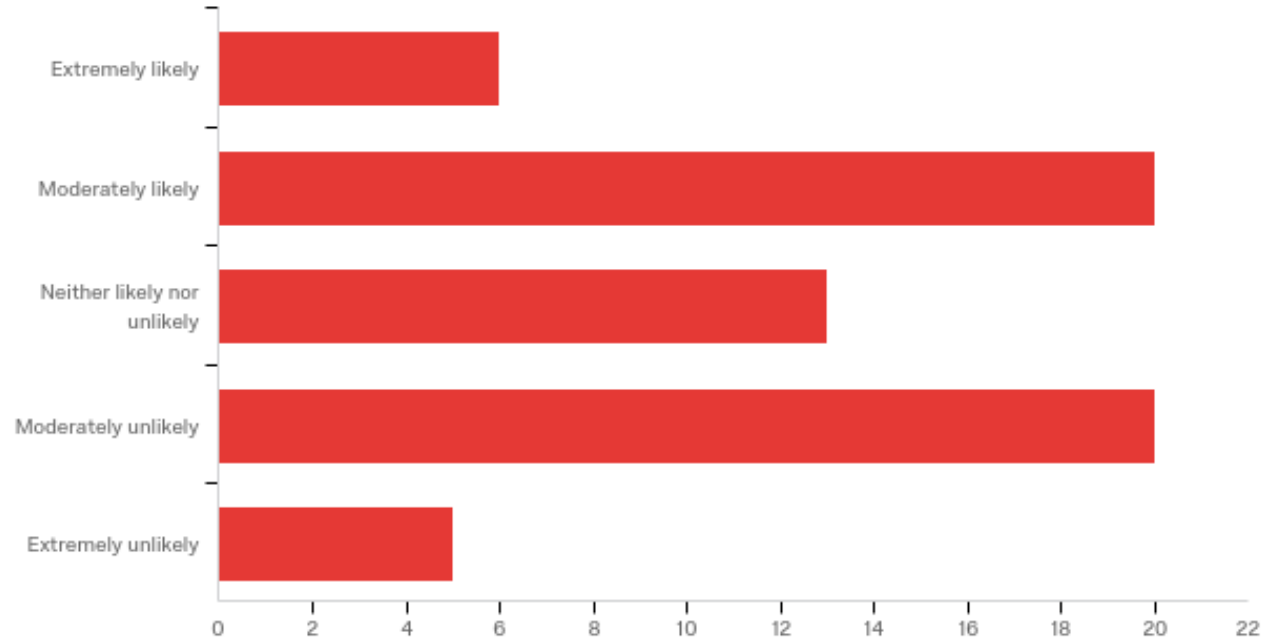
Q15 - Would you change from your usual retailer if another one is offering you free shipping?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you change from your usual retailer if another one is offering you free shipping?	1.00	5.00	1.92	0.94	0.88	64

#	Answer	%	Count
1	Extremely likely	39.06%	25
2	Moderately likely	37.50%	24
3	Neither likely nor unlikely	17.19%	11
4	Moderately unlikely	4.69%	3
5	Extremely unlikely	1.56%	1
	Total	100%	64

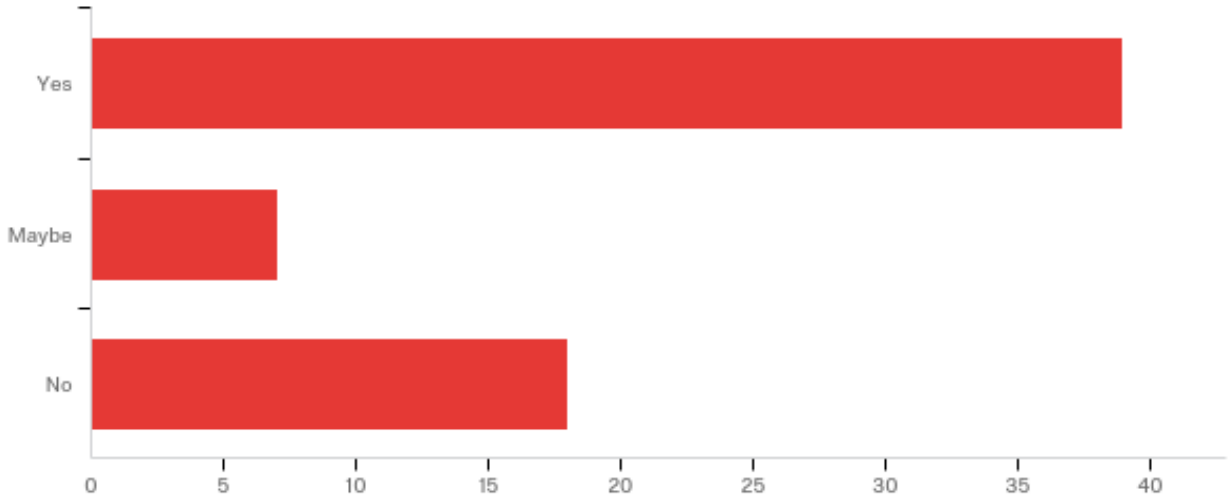
Q16 - Would you be willing to spend a bit more on the total of the groceries to have the free shipping (ex: retailers offer you free shipping after spending 150 euros)?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you be willing to spend a bit more on the total of the groceries to have the free shipping (ex: retailers offer you free shipping after spending 150 euros)?	1.00	5.00	2.97	1.15	1.31	64

#	Answer	%	Count
1	Extremely likely	9.38%	6
2	Moderately likely	31.25%	20
3	Neither likely nor unlikely	20.31%	13
4	Moderately unlikely	31.25%	20
5	Extremely unlikely	7.81%	5
	Total	100%	64

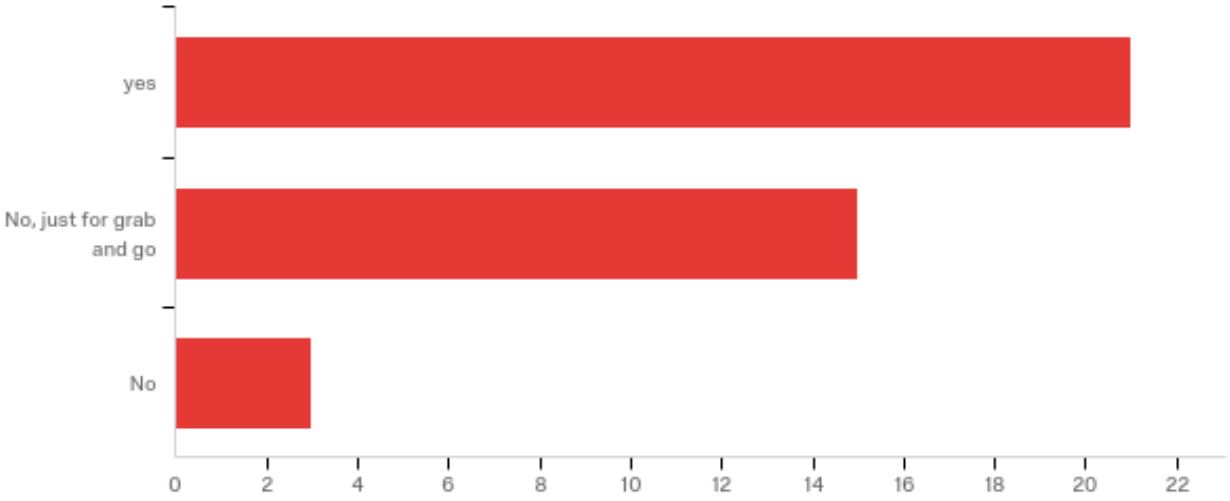
Q17 - Do you know what is Amazon Go about?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Do you know what is Amazon Go about?	1.00	3.00	1.67	0.88	0.78	64

#	Answer	%	Count
1	Yes	60.94%	39
2	Maybe	10.94%	7
3	No	28.13%	18
	Total	100%	64

Q18 - Would you become a customer of Amazon Go for the daily products?



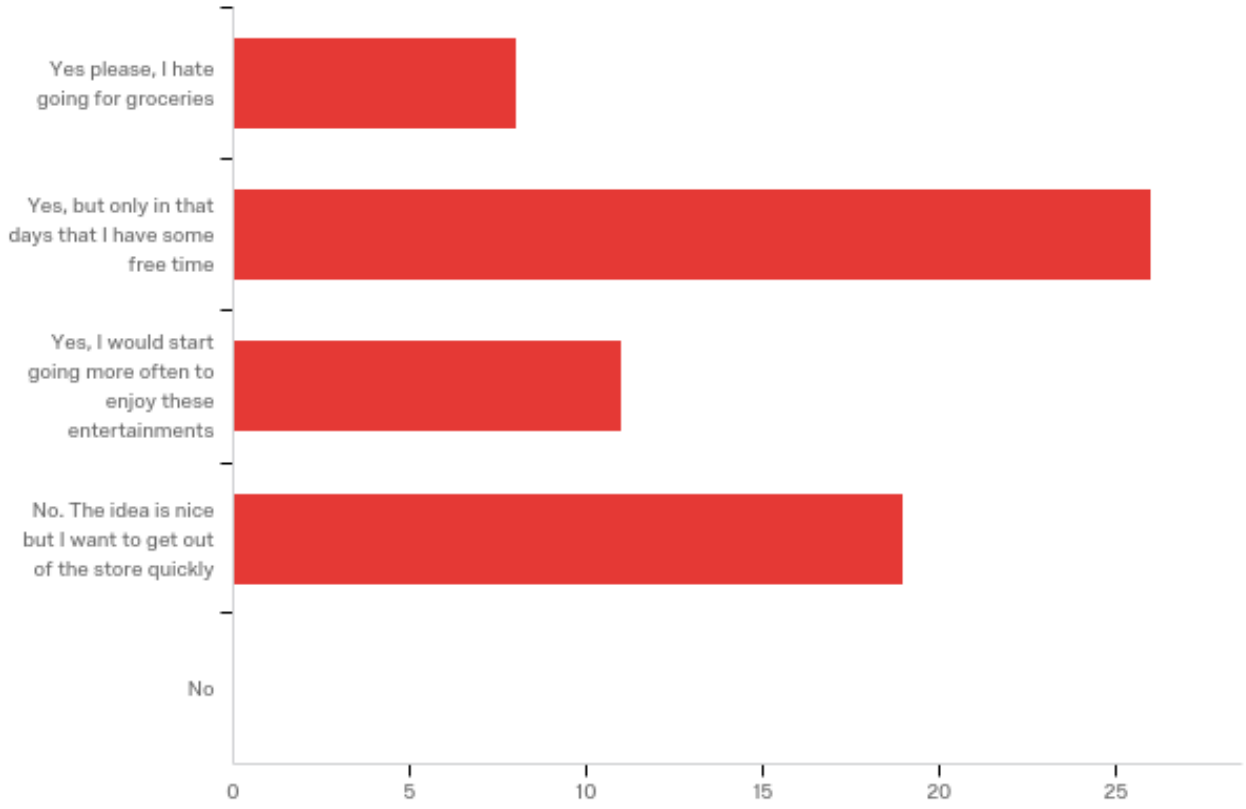
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you become a customer of Amazon Go for the daily products?	1.00	3.00	1.54	0.63	0.40	39

#	Answer	%	Count
1	yes	53.85%	21
2	No, just for grab and go	38.46%	15
3	No	7.69%	3
	Total	100%	39

Q19 - How much do you enjoy going to the supermarket?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	1	2.00	5.00	3.31	0.88	0.77	61

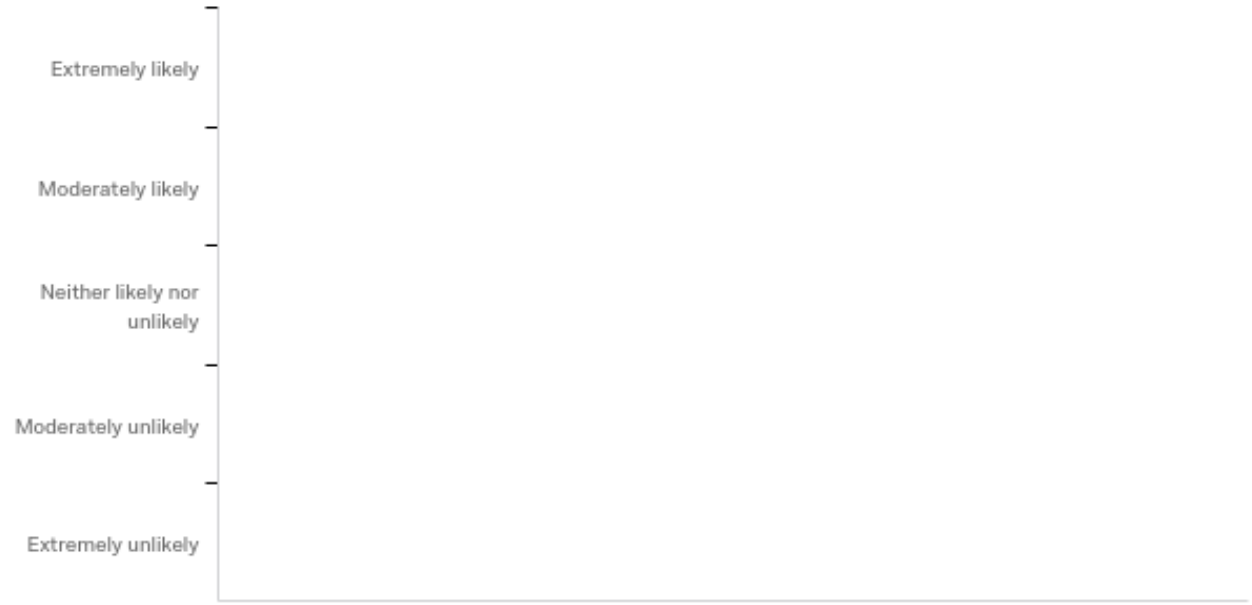
Q20 - Would you like to have some kind of entertainment while doing groceries in the store (ex: food tasting, express cooking lessons/advices, etc.)?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you like to have some kind of entertainment while doing groceries in the store (ex: food tasting, express cooking lessons/advices, etc.)?	1.00	4.00	2.64	1.04	1.07	64

#	Answer	%	Count
1	Yes please, I hate going for groceries	12.50%	8
2	Yes, but only in that days that I have some free time	40.63%	26
3	Yes, I would start going more often to enjoy these entertainments	17.19%	11
4	No. The idea is nice, but I want to get out of the store quickly	29.69%	19
5	No	0.00%	0
	Total	100%	64

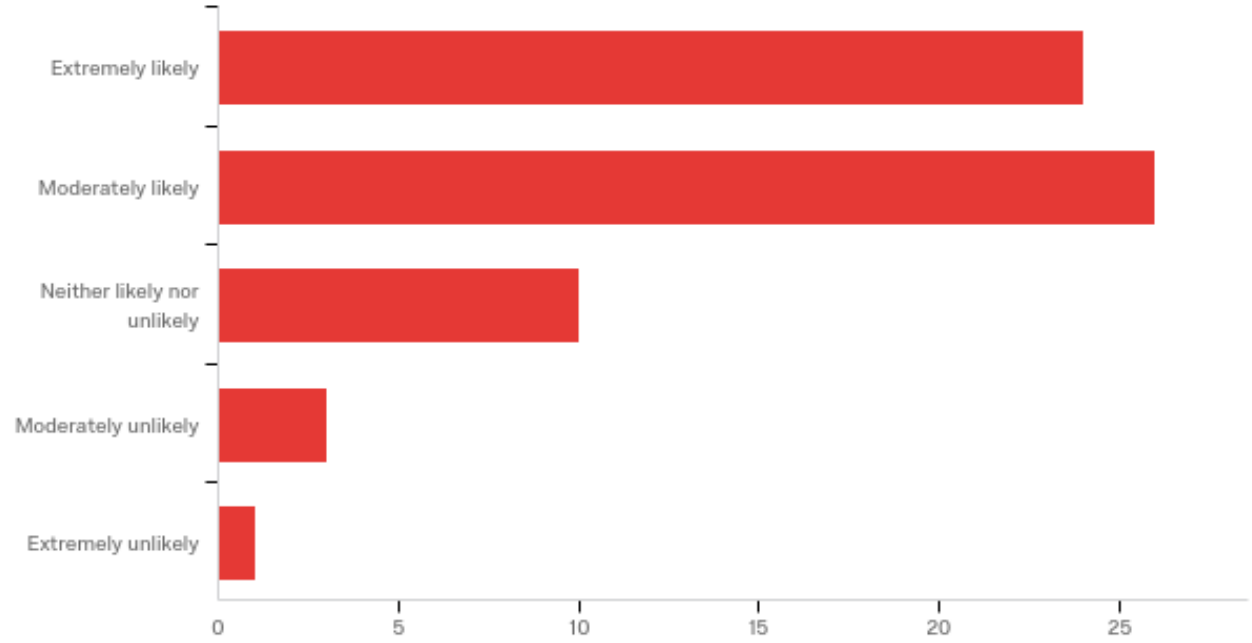
Q21 - Would you be willing to pay an extra for this experience?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you be willing to pay an extra for this experience?	0.00	0.00	0.00	0.00	0.00	0

#	Answer	%	Count
1	Extremely likely	0.00%	0
2	Moderately likely	0.00%	0
3	Neither likely nor unlikely	0.00%	0
4	Moderately unlikely	0.00%	0
5	Extremely unlikely	0.00%	0
	Total	100%	0

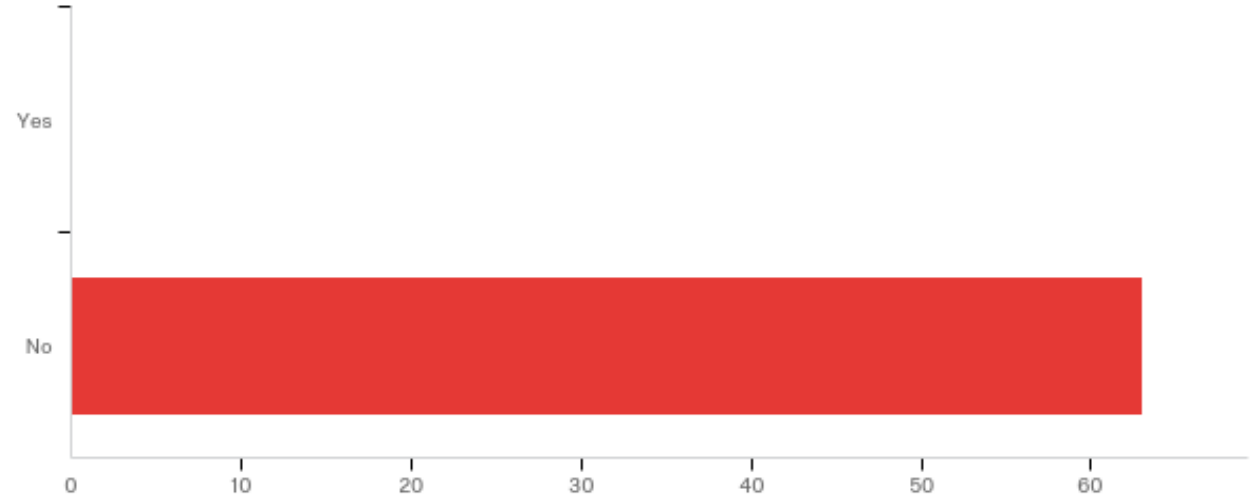
Q22 - Are you interested in a retailer that offers you a good and personalized experience (online and offline) while doing your groceries?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Are you interested in a retailer that offers you a good and personalized experience (online and offline) while doing your groceries?	1.00	5.00	1.92	0.92	0.85	64

#	Answer	%	Count
1	Extremely likely	37.50%	24
2	Moderately likely	40.63%	26
3	Neither likely nor unlikely	15.63%	10
4	Moderately unlikely	4.69%	3
5	Extremely unlikely	1.56%	1
	Total	100%	64

Q23 - Have you ever used voice assistant (Alexa, Google Home) to buy your groceries?



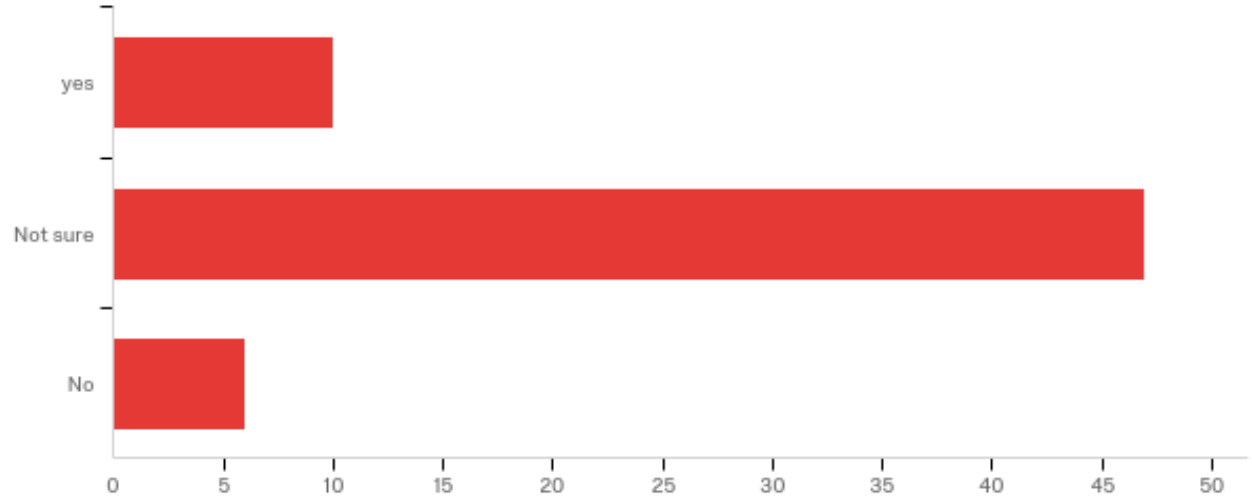
#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Have you ever used voice assistant (Alexa, Google Home) to buy your groceries?	2.00	2.00	2.00	0.00	0.00	63

#	Answer	%	Count
1	Yes	0.00%	0
2	No	100.00%	63
	Total	100%	63

Q24 - Will you be willing to try voice assistance?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	1	1.00	5.00	2.81	0.93	0.87	53

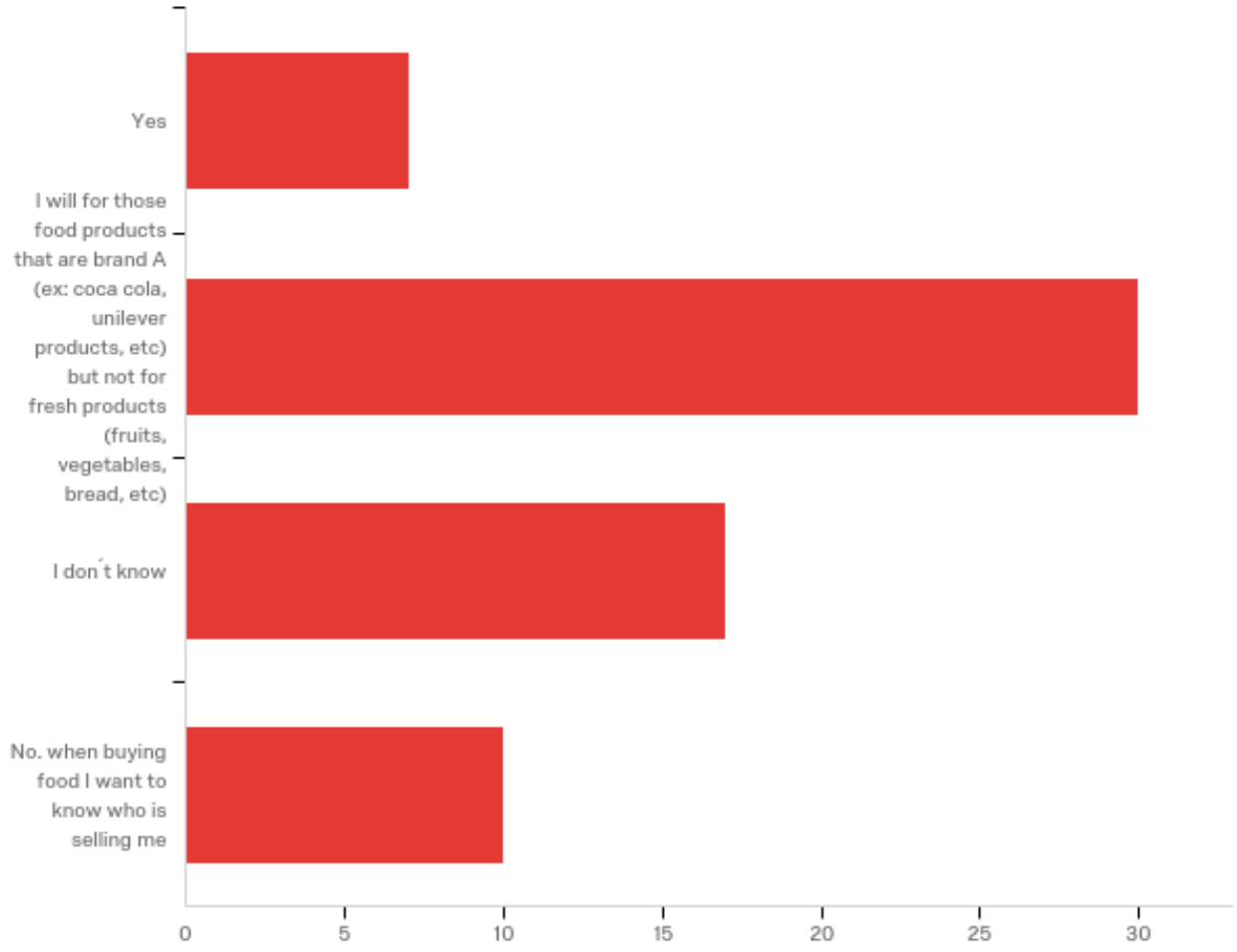
Q25 - Do you trust or think that voice assistant searches you the best deal of the product you ordered?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Do you trust or think that voice assistant searches you the best deal of the product you ordered?	1.00	3.00	1.94	0.50	0.25	63

#	Answer	%	Count
1	yes	15.87%	10
2	Not sure	74.60%	47
3	No	9.52%	6
	Total	100%	63

Q26 - When talking about online marketplace (website like Amazon or eBay where you can buy a product that is offered from different suppliers around the world), do you see yourself trusting on this kind of markets to buy food ?

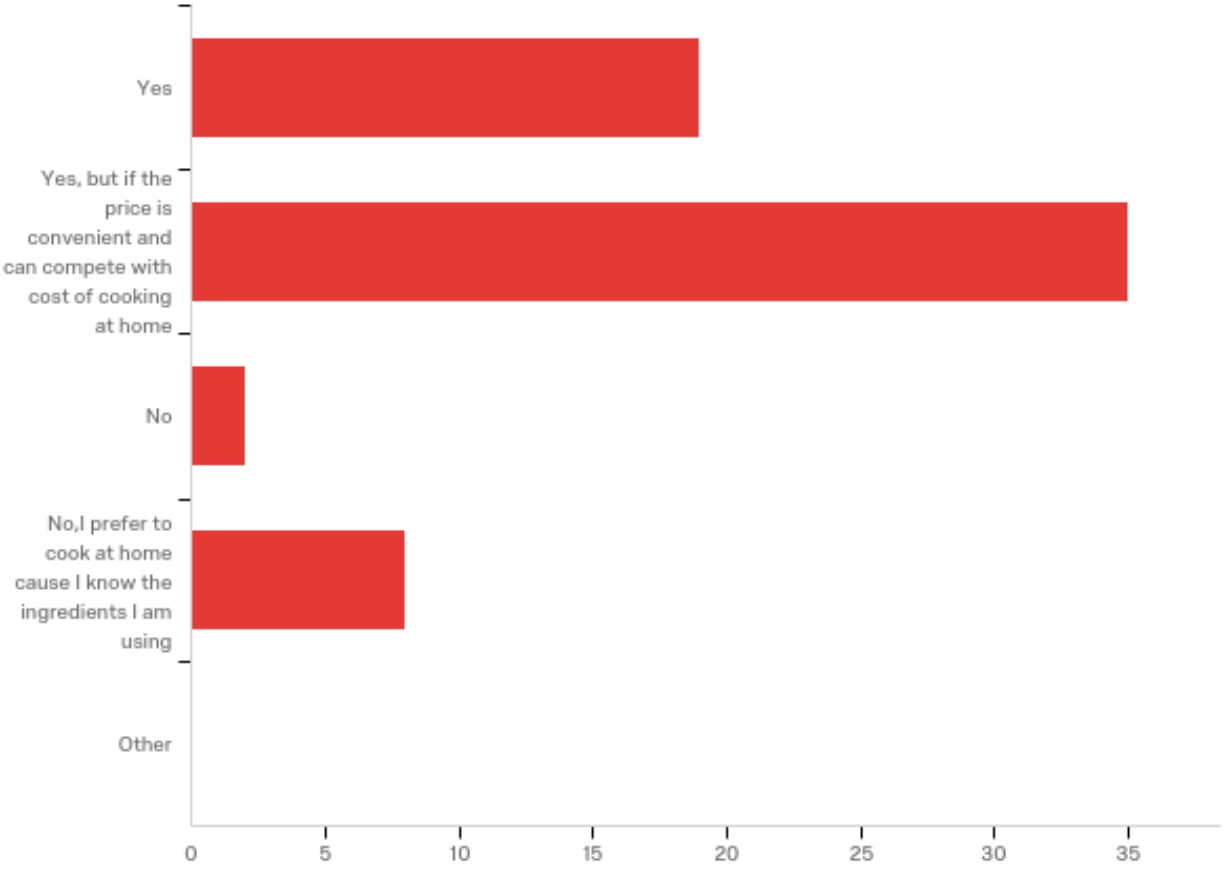


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	When talking about online marketplace (website like Amazon or eBay where you can buy a product that is offered from different suppliers around the world), do you see yourself trusting on this kind of markets to buy food ?	1.00	4.00	2.47	0.88	0.78	64

#	Answer	%	Count
1	Yes	10.94%	7

2	I will for those food products that are brand A (ex: coca cola, unilever products, etc.) but not for fresh products (fruits, vegetables, bread, etc.)	46.88%	30
3	I don´t know	26.56%	17
4	No. when buying food, I want to know who is selling me	15.63%	10
	Total	100%	64

Q27 - Would you like your supermarket to offer you meal fresh solutions (food ready to take and consume but fresh and without chemicals) in order you not to cook at home and have more free time?

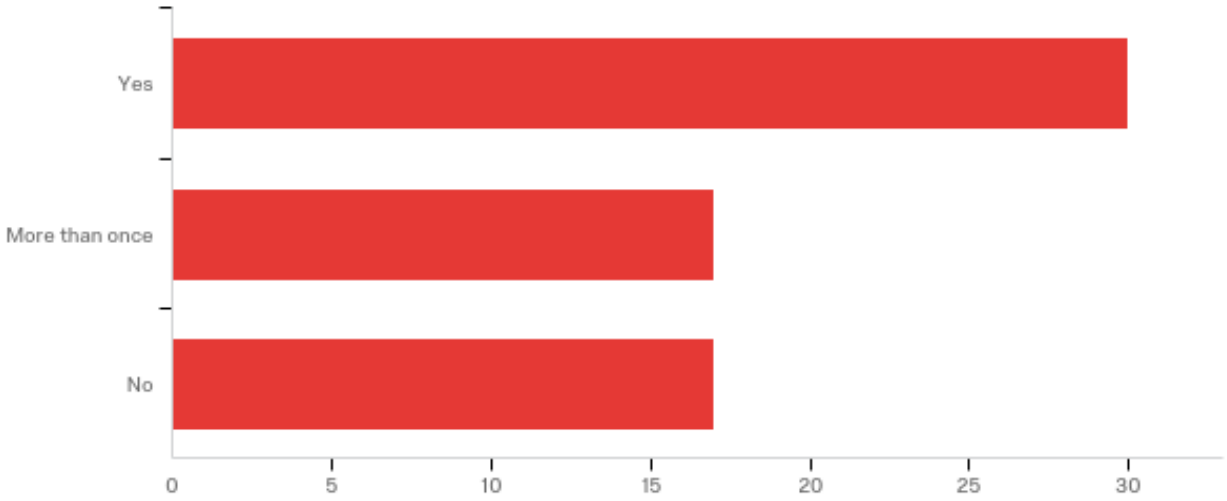


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you like your supermarket to offer you meal fresh solutions (food ready to take and consume but fresh and without chemicals) in order you not to cook at home	1.00	4.00	1.98	0.91	0.83	64

	and have more free time? - Selected Choice					

#	Answer	%	Count
1	Yes	29.69%	19
2	Yes, but if the price is convenient and can compete with cost of cooking at home	54.69%	35
3	No	3.13%	2
4	No, I prefer to cook at home because I know the ingredients I am using	12.50%	8
5	Other	0.00%	0
	Total	100%	64

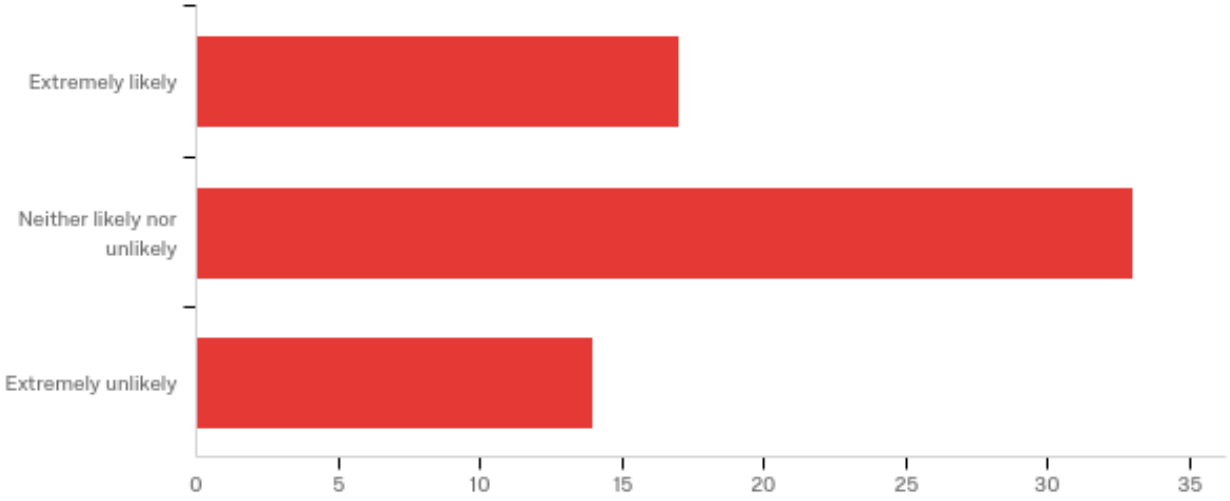
Q28 - Have you bought a take away meal (food already prepared) in the last month?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Have you bought a take away meal (food already prepared) in the last month?	1.00	3.00	1.80	0.83	0.69	64

#	Answer	%	Count
1	Yes	46.88%	30
2	More than once	26.56%	17
3	No	26.56%	17
	Total	100%	64

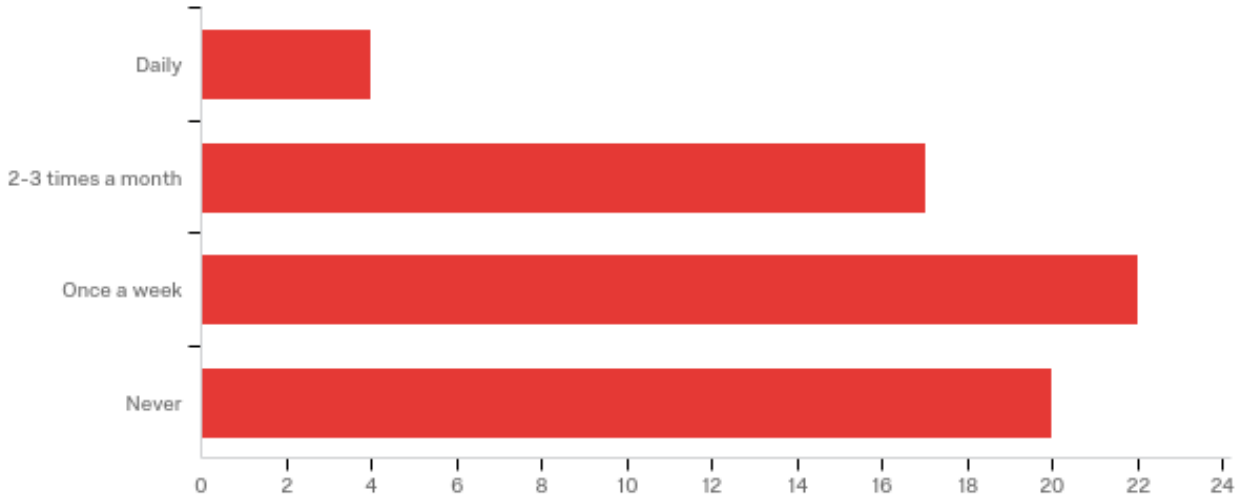
Q29 - Would you be willing to pay a bit more compare to the cost of cooking at home to buy ready to eat food at the supermarket?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you be willing to pay a bit more compare to the cost of cooking at home to buy ready to eat food at the supermarket?	1.00	3.00	1.95	0.69	0.48	64

#	Answer	%	Count
1	Extremely likely	26.56%	17
2	Neither likely nor unlikely	51.56%	33
3	Extremely unlikely	21.88%	14
	Total	100%	64

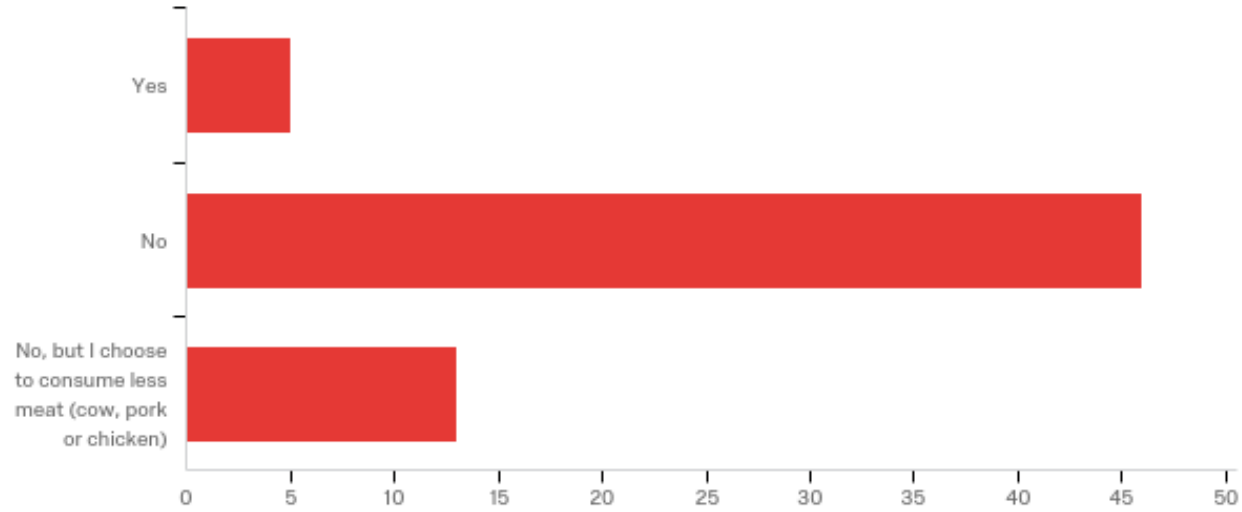
Q30 - How often do you buy bio products?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How often do you buy bio products?	1.00	4.00	2.92	0.91	0.83	63

#	Answer	%	Count
1	Daily	6.35%	4
2	2-3 times a month	26.98%	17
3	Once a week	34.92%	22
4	Never	31.75%	20
	Total	100%	63

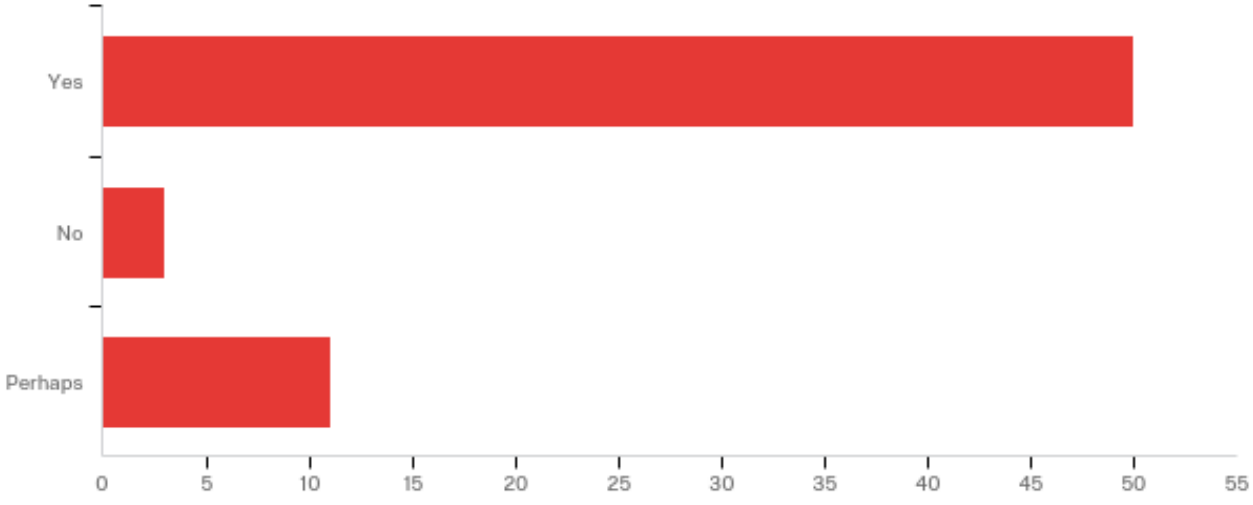
Q31 - Are you vegetarian or vegan?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Are you vegetarian or vegan?	1.00	3.00	2.13	0.52	0.27	64

#	Answer	%	Count
1	Yes	7.81%	5
2	No	71.88%	46
3	No, but I choose to consume less meat (cow, pork or chicken)	20.31%	13
	Total	100%	64

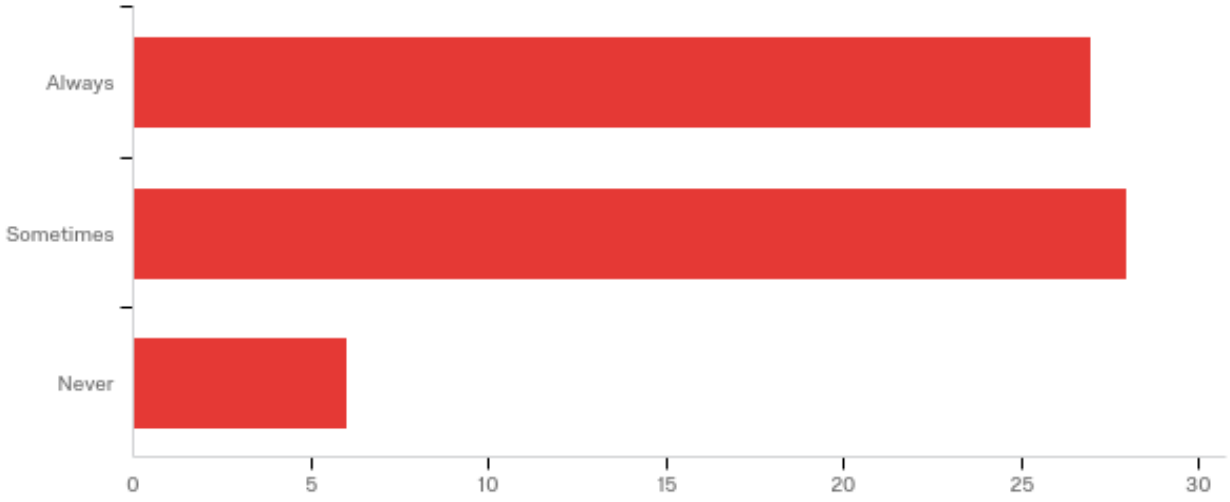
Q32 - Would you like that your supermarkets sell international products (ex: cheese from France, pasta from Italy, Indian spices and sauces)?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you like that your supermarkets sell international products (ex: cheese from France, pasta from Italy, Indian spices and sauces)?	1.00	3.00	1.39	0.76	0.58	64

#	Answer	%	Count
1	Yes	78.13%	50
2	No	4.69%	3
3	Perhaps	17.19%	11
	Total	100%	64

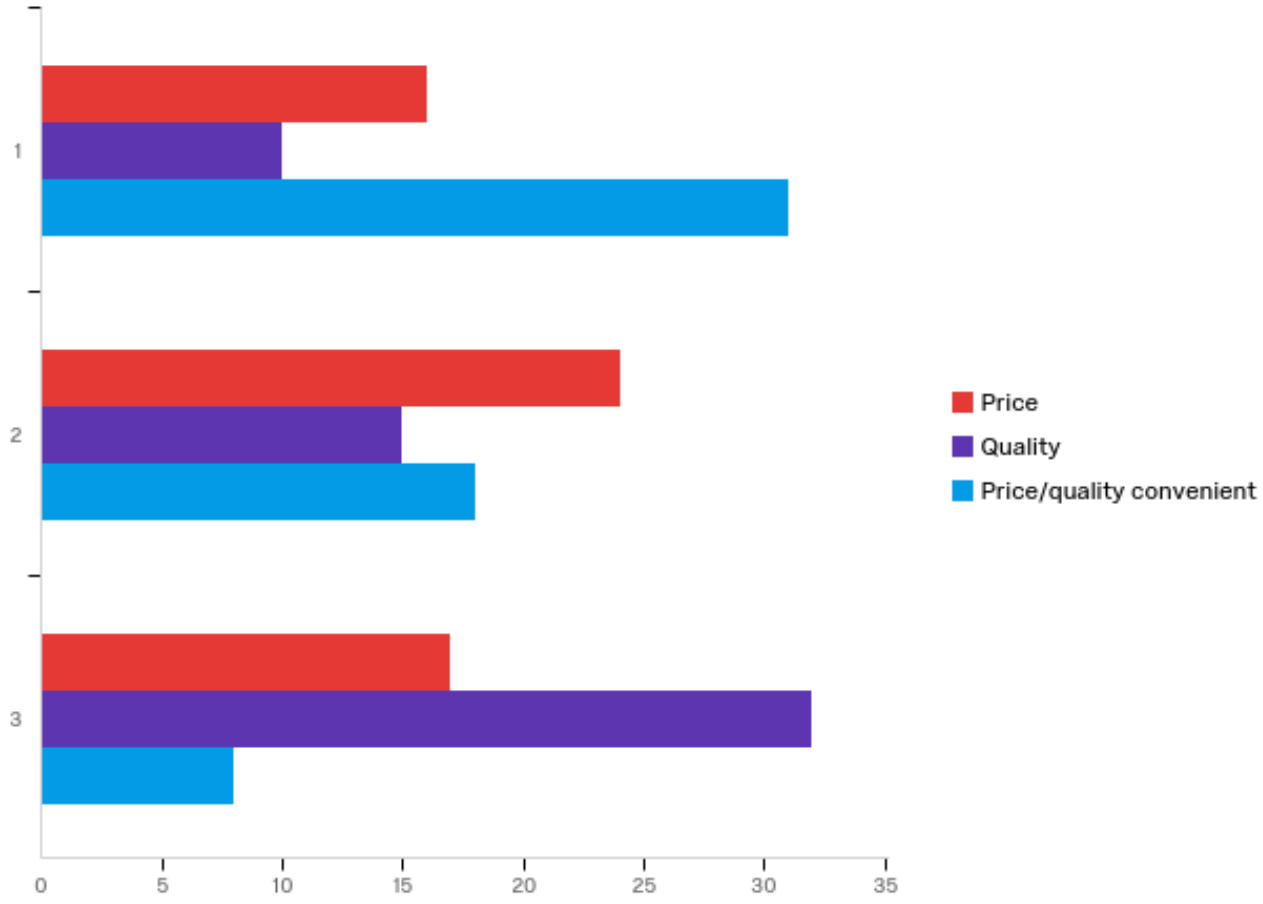
Q33 - From the times you go to the supermarket, how often do you consume private label products?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	From the times you go to the supermarket, how often do you consume private label products?	1.00	5.00	1.91	1.14	1.30	64

#	Answer	%	Count
1	Always	44.26%	27
2	Sometimes	45.90%	28
5	Never	9.84%	6
	Total	100%	61

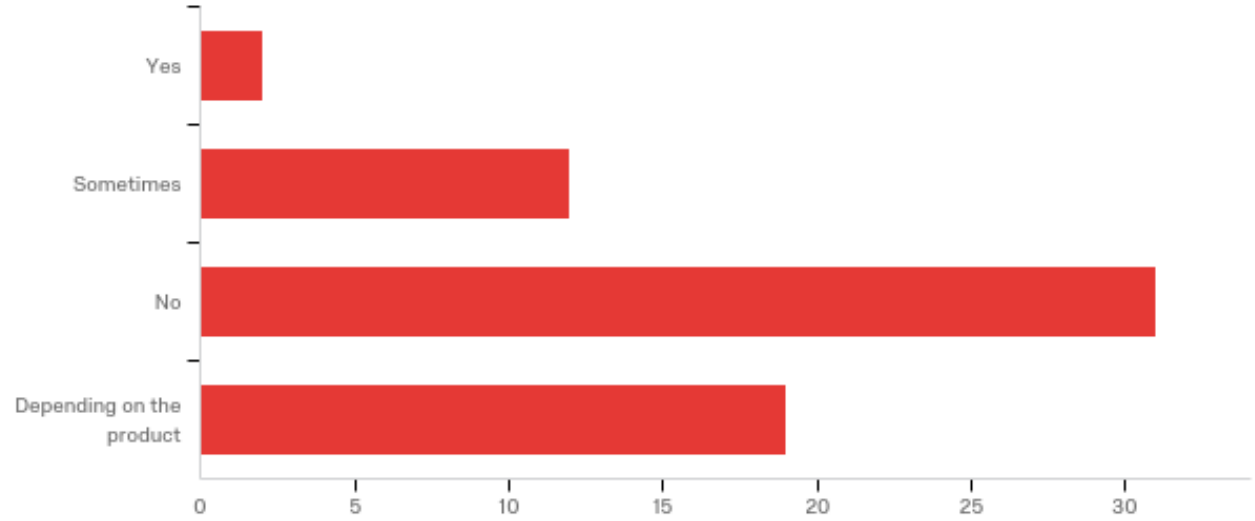
Q34 - When buying private label products, you choose it due to... (please order the options)



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Price	1.00	3.00	2.02	0.76	0.58	57
2	Quality	1.00	3.00	2.39	0.77	0.59	57
3	Price/quality convenient	1.00	3.00	1.60	0.72	0.52	57

#	Question	1		2		3		Total
1	Price	28.07%	16	42.11%	24	29.82%	17	57
2	Quality	17.54%	10	26.32%	15	56.14%	32	57
3	Price/quality convenient	54.39%	31	31.58%	18	14.04%	8	57

Q35 - When having guests at your home do you mind putting on the table private label products?

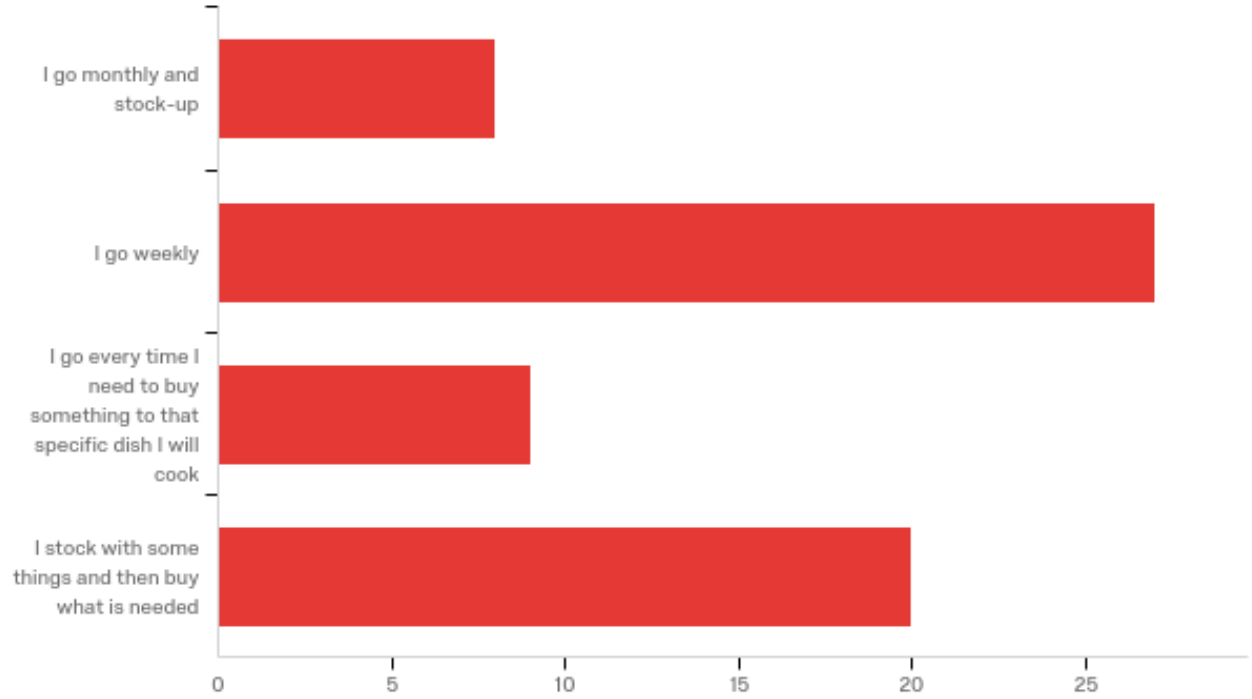


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	When having guests at your home do you mind putting on the table private label products?	1.00	4.00	3.05	0.78	0.61	64

#	Answer	%	Count
1	Yes	3.13%	2
2	Sometimes	18.75%	12
3	No	48.44%	31
4	Depending on the product	29.69%	19

	Total	100%	64

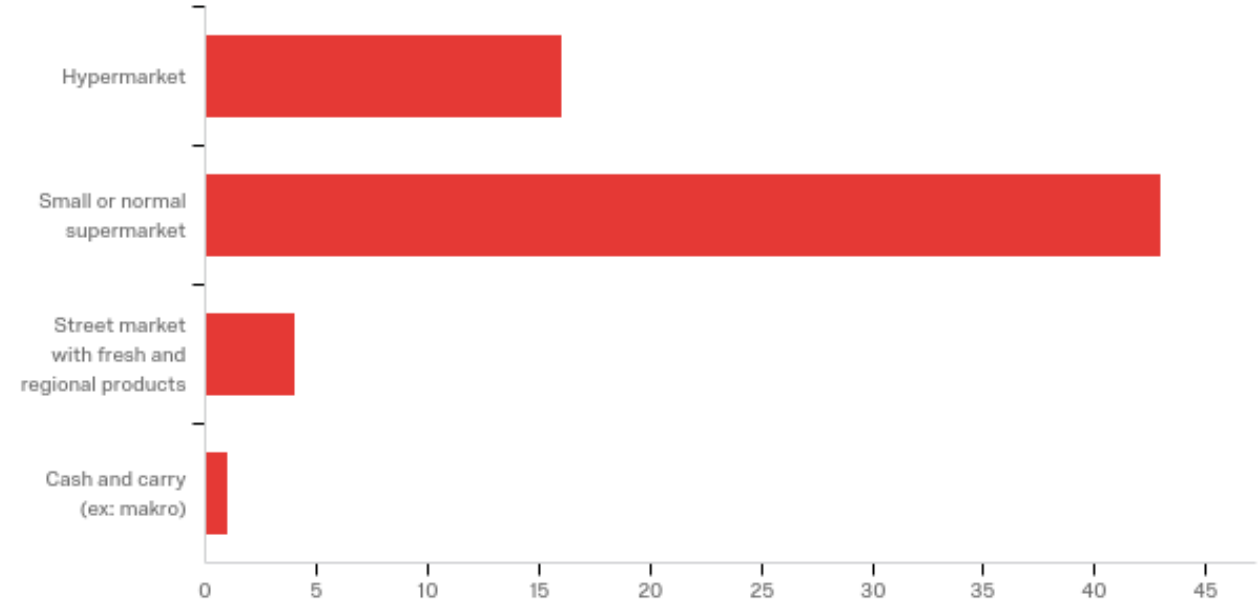
Q36 - How often do you do your groceries?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How often do you do your groceries?	1.00	4.00	2.64	1.05	1.11	64

#	Answer	%	Count
1	I go monthly and stock-up	12.50%	8
2	I go weekly	42.19%	27
3	I go every time I need to buy something for that specific dish, I will cook	14.06%	9
4	I stock with some things and then buy what is needed	31.25%	20
	Total	100%	64

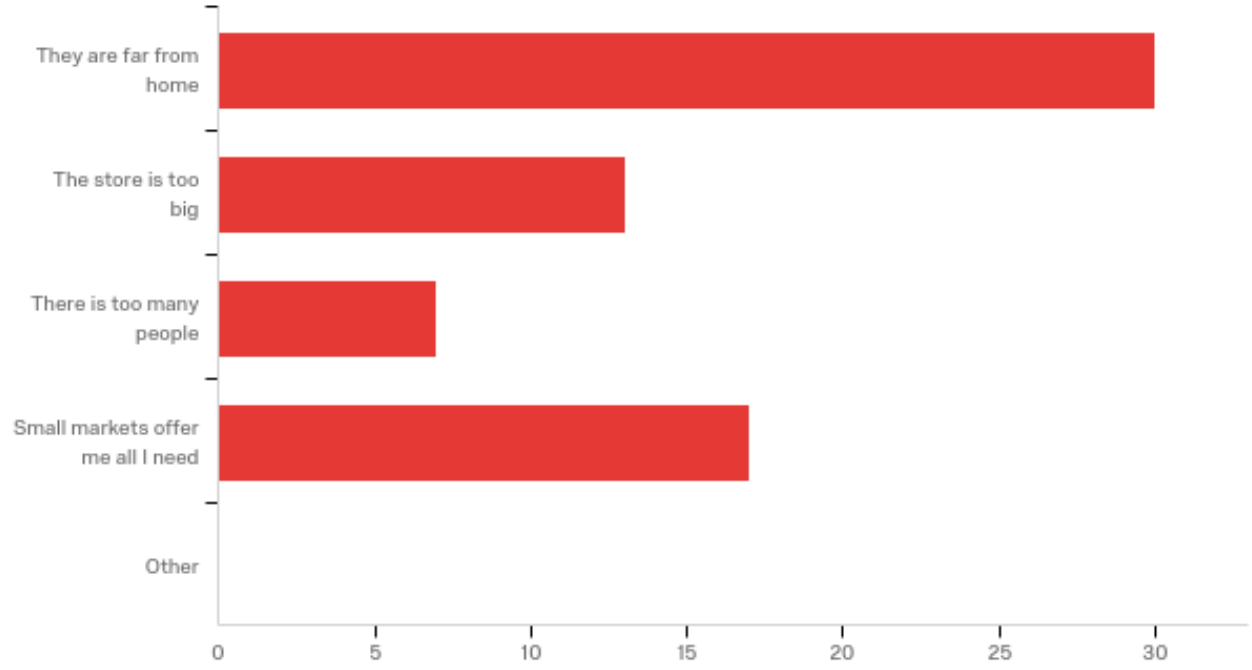
Q37 - When you think about your most frequent supermarket you go is this a..



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	When you think about your most frequent supermarket you go is this a..	1.00	4.00	1.84	0.59	0.35	64

#	Answer	%	Count
1	Hypermarket	25.00%	16
2	Small or normal supermarket	67.19%	43
3	Street market with fresh and regional products	6.25%	4
4	Cash and carry (ex: Makro)	1.56%	1
	Total	100%	64

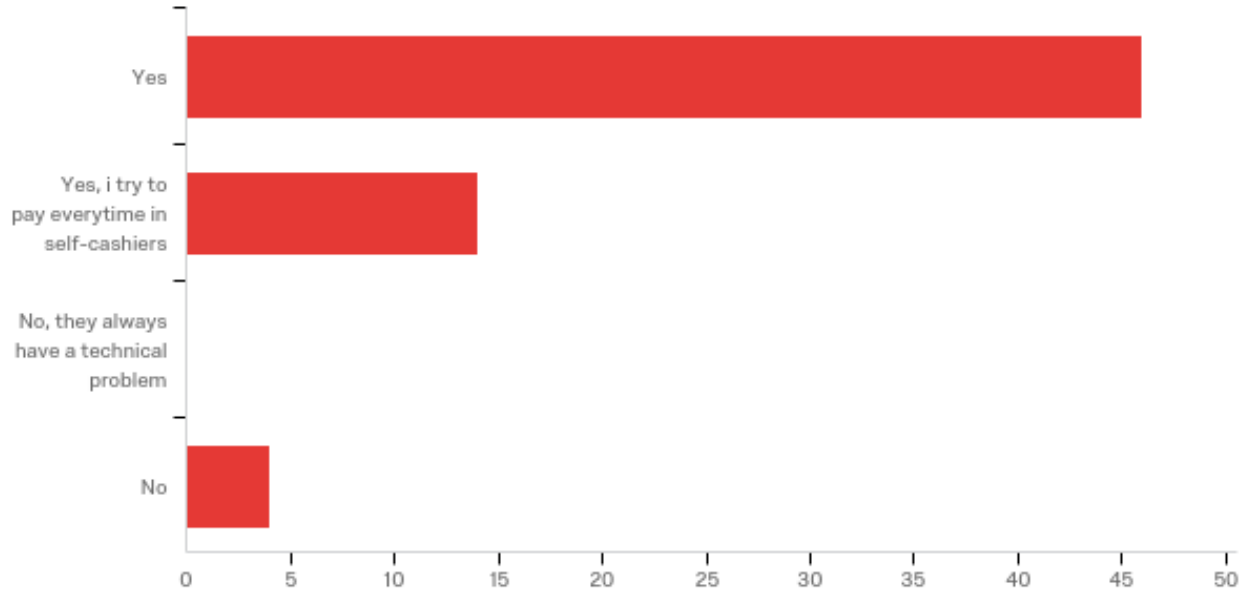
Q38 - Why don´t you frequent a hypermarket ? (you can choose more than one option)



#	Answer	%	Count
1	They are far from home	44.78%	30
2	The store is too big	19.40%	13
3	There are too many people	10.45%	7
4	Small markets offer me all I need	25.37%	17
5	Other	0.00%	0
	Total	100%	67

Other
Other - Text

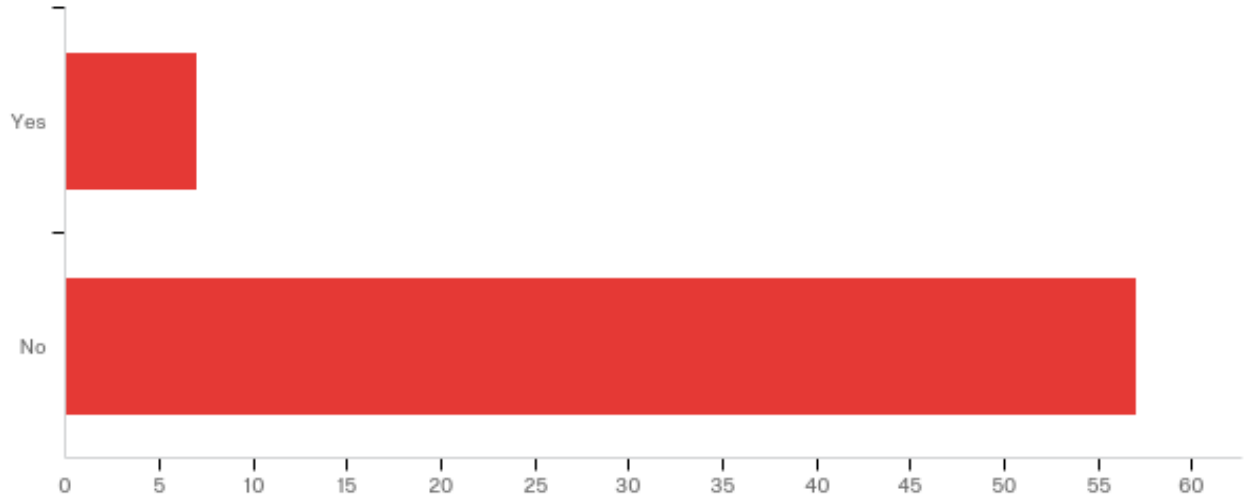
Q39 - Have you ever used self-cashiers ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Have you ever used self-cashiers ?	1.00	4.00	1.41	0.78	0.62	64

#	Answer	%	Count
1	Yes	71.88%	46
2	Yes, I try to pay every time in self-cashiers	21.88%	14
3	No, they always have a technical problem	0.00%	0
4	No	6.25%	4
	Total	100%	64

Q40 - Have you ever buy using a grocery app (for example: Walmart app, continente app) ?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Have you ever buy using a grocery app (for example: Walmart app, continente app) ?	1.00	2.00	1.89	0.31	0.10	64

#	Answer	%	Count
1	Yes	10.94%	7
2	No	89.06%	57
	Total	100%	64