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LEADING CUSTOMER CENTRICITY

IN RETAIL SUPERMARKET – THE CASE OF PINGO DOCE

ELLI STOYANOVA – 24904

A project carried out under the supervision of:

Professor Elizabete Cardoso

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TABLE OF CONTENTS

INTRODUCTION

1.1 Rising importance of customer in retail

In today's world people have a lot of choices of what to buy, where to go and what service to use. Companies facing the need to distinguish themselves from a vast amount of competitors, not only by suggesting the best price for the best product, as they were acting for a long time. The changes occur in relationships between organizations and their clients. Great effort is being made in order to build strong communication with customers, win their long-term loyalty and provide best customer experience. That is why in these latter days more and more companies are transforming from product-centric to customer-centric. Another reason why nowadays customer experience is more important than ever is digitalization of the world. "The number of internet users has doubled over the last seven years to reach 3.2 billion globally with an estimated 43% of the population using the Internet as of 2016" (Forbes 2016). Besides the great variability of choices, customers are using the fastest way to satisfy their need and it is essential to make them as happy as possible during this process. If company will use its chance to bring positive emotions to the buyer, there is a big chance that he or she will create their own content in social media to spread the word. Furthermore, if customers will know, that they have a chance to be heard and contribute to the company, it will encourage them to share more information and even be more friendly and patient if they will have complaints (Harvard Business Review 2016).

1.2 Pingo Doce

Pingo Doce is one of the largest supermarket operators in Portugal. It is a joint venture between two international groups: Ahold Delhaize that is based in Netherlands and operates supermarkets and e-commerce businesses and Jerónimo Martins that is based in Portugal and operates in food distribution and specialized retail sectors. In 1980 the first Pigo Doce supermarket was opened by the Jerónimo Martins Group and in 1987 company has already opened 100th store. In 1992 Ahold acquired 49% of the company's capital. In 1994 Pingo Doce created a new store concept, where fresh products gained a prominent place. Pingo Doce pioneered the e-commerce service with the first virtual supermarket in Portugal in 1998. In 2002 the new commercial policy was implemented “Every Day Low Price” and it was reinforced in 2009 with the campaign “In Pingo Doce the price is always low, in every store, all year long.” In 2013 in partnership with oil company BP the Poupa Mais “Save More” card was launched and in 2015 this partnership was strengthened with the opening of Pingo Doce & Go store (convenience store that is focused on “take away” and “cafeteria” service) at petrol station (Grupo Jerónimo Martins, 2015). According to the last available information on the third quarter of 2016 (Grupo Jerónimo Martins, 2016) Pingo Doce had 405 stores, sales reached 2,628 million euros, sales area was 485,952 (sqm). Compared to annual report from 31.12.2015, where Pingo Doce had 399 stores, sales reached 3,407 million euros, sales area was 479,113 (sqm). The Private Brand of Pingo Doce should also be highlighted, with a weight of 34.5% in the 2015 sales (Grupo Jerónimo Martins, 2016).

1.3 External environment of grocery retail market in Portugal

Since 2008 Portugal has been in an economic recession due to global economic crisis. That influenced the consumers’ spending and consumption habits. Government of Portugal plays a great role in stimulating economic recovery and therefore growth in private consumption. With increasing the minimum wage and salary for public servants, consumers fill less pessimistic about their financial situation and more positive about country’s economic prospects, this With the growth of purchasing power value sales of grocery retailers grew by 3% to reach EUR 21.3 billion during the 2016 year (refer to Appendix1, Table 2 for detailed value sales, outlets and selling space of grocery retailers).

The Portuguese grocery retail market considered to be highly concentrated and with competitive. Grocery retailers led by Jerónimo Martins SGPS SA with 17,2% company share. Mainly this result is achieved due to Pingo Doce, but this group is also present in the market with Amanhecer convenience store retail brand. It is followed closely by Sonae SGPS SA with 17% company share in 2016 due to its Continente Modelo and Continente retail brands. After them go

Auchan Group SA, ITM Entreprises SA and Schwarz, with company shares 7,0, 6,5 and 5,5 accordingly (refer to Appendix 1, Table 3 for detailed percentage of company shares). Concerning brand shares the leading position belongs to Pingo Doce (16,6) followed by Continente Modelo (8,7), Continente (6,6), Intermarche (6,5), Jumbo (6,0) and Lidl (5,5). Discounter chain, Minipreço was at its peak in 2011 and after that it started to decline it's brand share (refer to Appendix 1, Table 4 for detailed brand shares). In 2016 it closed 538 outlets in Portugal (Euromonitor International, 2016). In 2019 the structure of grocery retail market could be significantly changed, as in 2016 Spanish grocery leader Mercadona (that is known for efficient operations and competitive prices, generally in range of private label products) has announced that it enter the Portuguese market in tree years with its outlets.

Traditional "mercearias" (traditional small and independent grocery retailers) are facing the increasing power of large commercial centers and hypermarkets struggling to compete with big communication departments and strong negotiation power. However, as there is a rising interest in personalized services and fresh products, organic small grocery stores are growing and gaining opportunity to successfully compete in this market through retaining consumer loyalty and providing desired services (Euromonitor International, 2016). The Pingo Doce designs stores for families and places them in the neighborhoods closer to customer, so it is known as a local store. Among its competitors the same perception have Lidl and Minipreço.

1.4 Purpose of the study

Customer-centricity is a source of attention of different industries and supermarkets especially. In retail industry companies need to keep their fingers on the pulse of what is happening with customers as well. Supermarkets, and in particular Pingo Doce invest a lot of time and money to get more value from being customer-centric. Thus the purpose of this study and the marketing research problem is to determine the strategies of customer centricity, which will put Pingo Doce at the forefront of supermarket retail in Portuguese market.

LITERATURE REVIEW

2.1 Customer centricity

We live in digitally enabled globally connected world where competition is always growing and customer expectations are changing constantly. Consequently, businesses are changing from product centric into a customer centric approach and customer centricity is becoming a vital ingredient for sustainability of organizations and the most valuable asset (Zafer, 2015). As Peter Drucker said (1954) "it is the customer who determines what a business is, what it produces and whether it will prosper." To be capable of providing the ideal customer experience at the right time, a should align people, processes and technology to a customer centric strategy. Moreover companies should deliver personalized offerings by understanding needs and preferences of customers, developing insight about their interactions, use this knowledge to customize products and services to wants of the target groups and provide proper level of service (Zafer, 2015). This will lead to improvement of customer relations and increasing of customer loyalty. As well as return on investment and hence shareholder value.

Operational value chain should be established against customer touch points, needs of customers should be captured and company should analyze market trends to identify potential wishes of customers. Denish (2006) states, that customer centricity is not about how to sell products or services but rather on creating dual value – both from a company and the customer. As understanding of needs of customers becomes fundamental for the success, organizations create learning feedback mechanisms to get more information about their end-users (Zafer, 2015).

In mid-nineties, to connect sales and service department and to share information about customers between them, customer relationship management (CRM) systems were started to be used. These systems helped to generate a single view of customer for both departments. After some time, with developing wireless technologies, companies get an opportunity to start building strong relationships with each of customers, due to the easier connection, therefore value of each customer start to increase rapidly (Zafer, 2015). Now some people understand customer relationship management as a technology that helps track data about the customers, others as a customer service discipline, but also it could be understand as a way to increase value of a company through specific customer strategies. "That are focused on: acquiring profitable customers (get), retaining/winning back profitable customers longer (keep) and upselling/cross-selling products or reducing service and operational costs (grow). In other words, CRM is an enterprise-wide business strategy for achieving customer-specific objectives by taking customer-specific actions." (Peppers & Rogers, 2011) For this type of strategy establishing learning relationship in a company is essential. In this way, not only the organization make an effort for exploring the needs of customer, but also the customer teach an enterprise about his or her preferences. In order to build this kind of relationships, an organization should create an environment that would encourage commitment, satisfaction and trust of customers towards a company. This will not only lead to better cooperation between customers and an organization, but also improve quality and duration of their relationships. Besides creating a relationship with the customer, a company should constantly develop it by identifying customers as unique addressable individuals, differentiating them "by value, behavior and needs, interacting more cost-efficiently and effectively and customizing some aspect of a company's behavior, offerings or communications". (Peppers & Rogers, 2011)

2.2 Customer centricity in the supermarket industry

People face with shopping almost every day in their life; therefore grocery retail is a market that is very close to a wallet of a customer. That is way it is very important for companies to understand how the value is created and sustained from the viewpoint of consumer decision makers. This is where the leading retailers are focusing - on the creating value, as the consumer perceives it. It is include creating of right shopping environment, product selection and development of customer engagement strategy and balancing this value propositions with the retail price. Environment should be building after a company defined its main target audience to understand its customers and should include retail format, store location, design elements, atmospherics, and use of technology. First of all, people prefer to shop in environment, that doesn't bring more stress to there lives, that is why the purpose of a company is to make shopping process as easy and as relaxed and convenient as possible. Each of these aspects will influence spending, loyalty and word of mouth. Secondly, products selection requires from a company deep understanding of what the customer wants. This is all about shelf-space and trend management, and also about the importance of private label brands. Thirdly, now retailers believe that competition today is more about the relationships between them and their customers and in delivering an intimate local shopping experience. That's why more and more organizations start to apply analytics to retail management to build solid base of loyal customers. And last but not least, is decision about the price of products in the supermarket. Each of this components should come with it’s own KPI’s to track progress and measure success (Murray, 2013).

Supermarket operators need to invest in products, promotions and services that customer value the most. A lot of retailers worldwide agree that customer centricity is a very effective way to compete for customer loyalty. They all attentively analyze the behavior of consumers in order to create a unique experience of shopping that engages the customer and leads to rise of grocery spending. Grocers put the customer at the center of every strategy, trying to find out where the best customer-driven opportunities to develop the business are and distributing recourses to use them. The goal of customer marketing is to generate passion of the shopper for the store’s brand. Besides balancing the prices with the value propositions, company should deliver personalized pricing to buyers and design trade promotions around people. Base assortment decisions n the behavior of customers and understand their needs in each store to provide specific services to concrete customers. All these strategies should not only be analyzed attentively, but also should be ongoing. Benefits for supermarkets are significant, for example leading customer-centric grocers, are able to deliver ROIs of 5-8 times their customer-centricity investment and at the same time successfully compete in the market by satisfying needs of their shoppers (Precima, 2016).

2.3 Evolution of consumer expectations and behavior

In the age of Internet and increasing dependency consumers from technology retailing has become a dynamic industry (Zhitomirsky-Geffet & Blau, 2016). Bough supermarkets and their clients start to use technology in order to improve the quality of shopping experience. This is where the definition of smart retailing arises. It is “an interactive and connected retail system which supports the seamless management of different customer touch points to personalize the customer experience across different touch points and optimize performance over these touch points” (Roy & Melewar, 2016). The biggest challenge for retailing and consequently for grocers is meet present and future needs of generation Z (young highly educated, creative and technology friendly adults who were born in 1995 or later.) As consumers and as initiators and influencers of purchases (as children in families) they are more focused on innovation (Priporas & Fotiadis, 2017). Wood (2013) states that as consumers this generation can be characterized by four trends: 1) interest in new technologies, 2) insistence on ease of use, 3) need to feel safe, and 4) wish occasionally escape the realities of life. They have higher expectations, they usually are not loyal to any brand and the experience is something that they value the most (Schlossberg, 2016).

2.4 Best customer-centric practices in retail

Wal-Mart, American multinational retailing corporation, operating hypermarkets, discount department stores and grocery stores, in 2007 introduced customer-centric campaign “Save Money-Live Better”. As segmentation study identified people who were either emotional either behaviorally loyal to Wal-Mart or both, the company was concentrated on functional and emotional points that are important to customer: it offered low prices and made people feel like a smart shopper. The second one was achieved by the mobile app, which helps customers not to use physical energy by providing in-store navigation. Additionally, it was saving their "mental energy" by offering the best deals in store or Savings Catcher tool, where buyers can upload their recipes and company matches any lower prices that are available in other stores. The “Save Money, Live Better,” message was implemented across all communication channels: Print, circular, radio, online, in-store and TV. Results of advertising research showed a great year over year increase in buyers’ perception of Wal-Mart's core equities. In holiday period (2007) sales of a company were higher (+2.6%), than last two years of sales (2005: +1.9%, 2006: +1.3%.) (Lopez Negrete, 2008).

Tesco, grocer company in UK, become a customer-focus group by rebuilding all operations and implementing organizational changes in several steps. It built new stores, appealing to buyers; developed the range of sold products, putting accent on convenient and health food; cut the price of basic products and focused on value of money to the buyer. Also, the new senior management team was formed and employees in teams got responsibilities on different product lines. And after changes were made, Tesco launched a loyalty card “The Club Card”, that helps get data about the customers and segment them according to purchases, location and life stage. Using this information, customized offers were developed (for example offers on products for children are not sent to child free buyers). What is more, money-off coupon program inspired consumers to try related higher-priced products. The next step of the company was creation of online-shopping process. “A delivery time slot is selected before orders are made, and customers can give Tesco staff discretion to replace list items with alternatives should their first choice be out of stock” (European Business Journal 2012). Due to the fact that Tesco was thinking about its customer experience on every level of the company, it “established the gold standard for UK online supermarket shopping with its repeat order functions and lists of favorites and previous purchases” (European Business Journal 2012).

Walgreens, American pharmacy store chain, in September 2012 launched the program “Walgreens Balance Rewards”, that become largest consumer loyalty program with more than 100,000,000 members. The mission of the company was to create customer-centric program that will be oriented on helping individuals get, stay and live well. To measure success the company tracked: “Enrollment, Devices & Applications Connected, Miles Logged, Pounds Lost, Monthly Active, Rate, Balance Rewards points Awarded” (Mobile Marketing association 2014). And was build around two ides: inform and motivate current buyers about new ways of savings and connect with users of wearable devises and applications. As the campaign was relevant at that time and member-centric, enrolment and word of mouth increased significantly. “Membership: plus 100,000,000. Devices or Applications Connected: plus 200,000. Miles Logged: plus 120,000,000. Balance Rewards Points Awarded: plus 2,200,000,000” (Mobile Marketing association 2014).

Albertsons Companies, food and drug retailers as their digital marketing strategy launched mobile app and website “Just for U”. With use of them the company turned data that was collected 25 years into customized offers for buyers, like alerts about sales on items that was frequently purchased. This allowed the company better serve customers by personal approach of predicting their behaviors (Cindy Zhou, 2016). “Data discovery was conducted 70% faster. Time to execution decreased 70%. Personalized email resulted in 300% more redemptions than paper redemptions $300,000 in additional funded redemptions. In four days, Albertsons' Loyalty team proved the value of personalized digital marketing, delivered hundreds of thousands of dollars of additional revenue, and saw a time savings-based ROI of $30 for every $1 spent on Alation.” (Cindy Zhou, 2016).

The strategy of Kroger, grocery store chain is held under the slogan: “Kroger Knows Your Shopping Patterns Better Than You Do”. Each quarter the company sends to customers 11 million “snowflakes” - direct males, among which any of two has tiny chance to be the same. Each mail contains 12 carefully designed coupons customized for each buyer. It contains of one non-ordinary product, like special wine; then basic products, that a customer used to buy; and last too are experiments, that are also based on shopping habit, but that buyer never tried before. Therefore, 80% is focused on already collected data and 20% is focused on discovery (Tom

Grornfeldt, 2013). “In the next six weeks after mailing 71 percent of households will redeem at least one coupon in the store. The coupons have generated $10 billion in revenue for Kroger” (Tom Grornfeldt, 2013). Also, after Kroger has invested in this program, Progressive grocer magazine named it “Retailer of the year”.

As a conclusion, it is clear that to satisfy higher expectations of consumers retail companies reinforce their orientation to customer and successfully use it in a way to improve and develop their businesses. Therefore aim of this study is to find the way for Pingo Doce benefit from customer-centricity even more. Nonetheless it is unreasonable to develop customer-centric strategies based only on experience of other companies, that is why the methodologies reviewed can compliment one another and together with best practices result in customer-centric plan aiming strategically at putting the company at the forefront of customer centricity in supermarket retail in the Portuguese market.

METHODOLOGY

In order to come up with new customer centric strategies for Pingo Doce and to examine current customer centric strategy from outside and inside of the company the study consisted of two stages. In the qualitative stage in order to provide insights and deeper understanding of the marketing research problem exploratory research design was used and personal semi-structured interviews were conducted with Pingo Doce employees from different departments. As a result research questions were developed and hypotheses were formulated. During the quantitative stage in order to analyze previously generated hypothesis conclusive research design was used and descriptive cross-sectional type of research was selected. As the data collection method online questionnaires with customers of Pingo Doce was conducted. Interviews took place between the 23 and 31 of March, and the online questionnaire gathered responses between 4 and 11 of May. The key methodological considerations in the methods selection and performance of the two stages are presented in the following sections.

3.1 Qualitative stage

According to Lewis et al. (2012), "The research interview is a purposeful conversation between two or more people, requiring the interviewer to establish rapport, to ask concise and unambiguous questions, to which the interviewee is willing to respond, and to listen attentively". As the study includes an exploratory element, five personal semi-structured interviews were conducted with representatives of five different departments of Pingo Doce: stores operation, customer care, private brand department, commercial team and layout team. It was decided to use semi-structured interview instead of focus group due to several reasons: the aim was not to identify the common trends, but investigate the different approach to customer centricity in different departments; some departments have more power then others or a better access to some information, so there might arise dominating individuals, who can influence a lot on the results; all together interviewees might be not willing to mention all problems in their departments. While preparing for conducting the interviews, some measures to overcome interviewee bias were considered: level of information supplied to each interviewer was equal and included information about the interviewer and purpose of study; interview location was appropriate and comfortable for all interviewees; behavior and non-verbal behavior were under the control, questions were phrased clearly and attentive listening skills were used (Lewis et al., 2012). Respondents were asked a list of questions about level of customer centricity in Pingo Doce, about it's analyses and how it shape the activities of their department; they were asked to compare it with the competitors of the company and to tell about customer centric practices in retail which they liked; if now problems were mentioned they got an additional question about problems in communication between the company and customers; at the end they were asked to think about the typical buyer that comes to Pingo Doce. The order of questions varied depending on the flow of the conversation and all interviews were audio-recorded and lasted for 30 minutes in average. In order to analyze this semi-structured interviews audio data was used. Audio data can be classified into tree types: "those produced and recorded as products which will be "consumed" by the target listeners, audio recordings of daily human communication and voice recordings specifically made for the purpose of analysis" (Malhotra, 2013). For purposes of this thesis the last type, primary data was collected and then transcripted. Afterwards main information and interpretation of quotations were summarized in the table, where the opinion of each interviewee on each question can be found. Finally a synthesis of the interview results obtained was presented (refer to Appendix 2 for detailed interview analyses and results). Based on the results gotten in the qualitative research, the research questions were generated and hypothesis for testing were formulated. They are presented in the "Results" section of the study related with required analyses and scales used in the questionnaire.

3.2 Quantitative stage

In order to analyze hypothesis previously generated in exploratory part of the study, conclusive research design should be used for quantitative stage. There are two types of conclusive research: descriptive and casual. As the need is not to find cause-effect relations but to "gain an accurate profile of events, persons or situations" descriptive cross-sectional type of research was chosen. (Lewis et al., 2012). Among different methods of analyses as the appropriate method for collecting data survey method was chosen, as an efficient way of gathering data from a large sample. Although there is a wide range of survey methods, such as personal interviews, telephone surveys, mail surveys and Internet surveys, all different in several factors, such as nature of the population, distance access to correspondents, target population, speed of distributing questionnaires (National Academies Press, 2009).

According to deVaus (2002), questionnaire is a "general term to include all methods of data collection in which each person is asked to respond the same set of questions in a predetermined order". Due to high adoption rate of the Internet by all 3 generations that were mentioned as a typical customer of Pingo Doce in qualitative research (baby boomers, generation x and millenials), due to high dispersal of stores throughout the country and for the purpose of saving time it was decided to use self-completed questionnaire namely an Internet based survey as the most effective technique.

The target population was defined as customers of Pingo Doce and to reach the people non-probability convenience sampling was done. Hence friends, the social network, and members of Nova SBE Facebook groups were invited to participate in the survey and several times link to the questionnaire was reposted that is why due to the respondent self-selection selection bias is present. But considering the fact, that Facebook groups and social network may include people who are not customers of Pingo Doce, respondents were screened through a filter question in order to validate the sample. At the moment of closing the questionnaire it collected 161 responses.

The questionnaire was designed based on previously generated hypotheses (refer to Appendix 3 for full questionnaire). Additionally people were asked to evaluate the importance of attributes in shops to understand what they value the most in the shopping process. Lastly set of characterization questions were introduced. The questionnaire consists of 28 questions and design of each question was determined by the data that need to be collected. Use of the open questions was kept to a minimum, therefore only 3 questions requires to typing the text. One of them is the question about age of the respondent and two other appear only if during the questionnaire person chose the option, which will need further explanation of his choice. In order to collect data from attribute types of questions besides one open question list questions were used, such as dichotomous and multiple choice questions. Other types of questions, used to analyze opinions and behavioral of customers of Pingo Doce related with hypotheses are presented in the table, that is presented in “Results” section.

RESULTS AND DISCUSSION

In this part of the study results of questionnaire are presented and the choice about rejecting or not the previously generated hypothesis is made. Afterwards, to show how the research questions have been answered with this study, findings are compared with literature review. Of all who were invited to participate in the online questionnaire, 240 people started it and 161 of them completed it. Because of use of the filter question, out of 161 participants 7 stated that they are not customers of Pingo Doce, therefore data from 154 respondents was used for the analyses. Speaking about demographics, most of respondents are females (81%) and the average age is 34 years and varies from 20 to 63. Despite the fact that students were answering the questionnaire a lot (25%), large number of qualified and skilled workers (21%), housewives (18%) and specialized technicians and small business owners (17%) were participating. Descriptive statistics in detail could be found in Appendix 4.

4.1 Presentation of results

To analyze the results of the questionnaire it is important to go through all previously generated hypotheses and compare them with generated data in order to reject them or not and relying on them suggest the appropriate customer centric strategies. First of all it is important to mention, that 17% of respondents do not have a Pingo Doce shop in there neighborhood, but still chose to be customers of this supermarket, which I will explore later on. On the whole 13 of 17 hypotheses were not rejected, that shows high knowledge of customers in the company (see Table 1). In the Appendix 5 could be found all graphs that show the responses of the sample of respondents that could be performed.

Table 1: Results of the qualitative analyze.

Research questions	Hypotheses	Type of question	Results	
Shopping habits of customers				
1) How often People go to Pingo Doce?	Customers of Pingo Doce do grocery shopping at least once in a week	Dichotomous, multiple choice question.	Most customers of Pingo Doce do grocery shopping once (35%) or twice (32%) a week.	Not Rejected
2) What makes people come to Pingo Doce?	People choose Pingo Doce for proximity, good prices and good quality of the products.	Constant sum scale	Proximity (29%), good prices (29%), good quality of the products (17%). And 44% of respondents allocate 0 points to “good loyalty system”, 40% to “good atmosphere in the shop” and 27% to fresh healthy food.	Not Rejected
3) In what categories did the company manage to gain consumer trust regarding brand of Pingo Doce?	Customers trust Pingo Doce brand in fresh fruit and vegetables category.	Multiple choice question	94% of customers who buys private brand trust it in meat (13%), fresh fruit (11%) and vegetable (12%) and dairy (10%) category.	Not Rejected
4) In which categories people do trust A brand more than Pingo Doce brand?	In some categories of products between the same product of A brand and private brand of Pingo Doce, customer will buy A brand.	Dichotomous question, Multiple choice question	In categories of alcoholic beverages (15%) and personal care (14%) customers will stay loyal to A brand.	Not Rejected
5) How often people do online grocery shopping?	Most of customers of Pingo Doce do not do online grocery shopping	Dichotomous, Open and Multiple choice question	69% do not shop online, as they prefer to check quality of products in real live (40%) or have physical stores nearby (30%). From those who shop online, 66% do not want to by grocery products online as they prefer to check the quality of products and date of expire in by themselves (45%).	Not Rejected
6) Will easy ordering and reliable delivering motivate consumers to do online grocery shopping?	If the process of ordering online will be intuitive and delivering will be reliable, customers will rather shop online than go to the physical store.	Dichotomous question	Even though the company will guarantee intuitive ordering online and reliable delivering, 66% of customers will prefer the physical store.	Rejected

7) Is it important to have self-service systems in supermarkets?	People prefer to use self-services while buying bread, cheese, fish and meat.	Matrix question	People would like to have self-service systems in bakery (70%) and cheese and charcuterie (66%) areas where they will pick product from a pre-packaged option, but they would like to be serviced by a person in fresh meat (79%) and fresh fish (87%) areas even if it implies waiting in line.	Rejected
Communication between customers and Pingo Doce.				
8) What is the degree of communication between Pingo Doce and customers on a one-to-one bases?	Customers think that there is enough communication with Pingo Doce on a one-to-one bases.	Likert scale	26% of customers stated that it is enough communication and 23% stated that it is somewhat enough.	Not Rejected
9) To which extent communication between Pingo Doce and customers is personalized?	Customers believe that communication between them and the company is not personalized enough	Likert scale	26% of customers think that communication is not personalized enough and 22% think that it is not personalized at all.	Not Rejected
10) Does the knowledge about changes in the company influenced by feedback, motivate people to leave more comments?	People fill inspired to live more feedbacks for the company if they know that their voice can bring changes.	Dichotomous question	74% of customers willing to write reviews and feedbacks more, if they will know, that their voice can bring changes.	Not Rejected
11) Should the company notify people about the changes in accordance with their feedback?	It is important for people to know, that company not only hears feedback of customers, but also takes appropriate measures according to it.	Dichotomous question	81% of the customers want to be aware about changes Pingo Doce is making to make customers' lives easier.	Not Rejected
12) Should any member of the team in the supermarket be responsible for answering	It is useful for customers to be able to receive valuable information form any member of the team in the supermarket.	Dichotomous question	76% of respondents mentioned that it would be useful to be able to receive valuable information from any member of team in the supermarket.	Not Rejected

questions of the customers?				
13) Is Poupa Mais card developed enough in customer's point of view?	There is need to improve loyalty card Poupa Mais.	Likert scale	28% stated that they are "somewhat satisfied", 53% of them stay indifferent, it means that they either do not have this card or do not know a lot about it, therefore there just a few customers, who dissatisfied with this card, but all in all level of satisfaction is inadequate.	Not Rejected
14) Is it important to take a closer look on what people are discussing in social networks about products of Pingo Doce?	People are interested in presenting their opinion about or read about the particular product in social networks.	Multiple choice question	Most of the people are not interested in in discussing in social networks their opinions on the particular product they bought as they do not like to share their private information online (56%), but sometimes participate in discussions in social networks (40%). But they read reviews about the products, if they are not sure in them (47%).	Not Rejected
15) Do people visit the site of Pingo Doce?	Customers visit site of Pingo Doce at least once a week	Multiple choice question	38% of customers have never visited the site of Pingo Doce and 33% of them do not visit it on regular basis.	Rejected
16) What is the main purpose of the site of Pingo Doce from the customer's point of view?	On the site of the company customers value information about special offers and recipes	Constant sum scale	38% of customers of Pingo Doce have never visited the site of Pingo Doce and 33% of them do not visit it on regular basis.	Rejected
17) Should Pingo Doce continue developing it's own app?	People find useful the app with the following features: recipes made by company and other people, where customer can add or save favorites or plan meal for a period of time; comfortable to fill shopping list, that will offer promotions on product. It is connected with loyal card, to use the bar code from the phone instead and it reminds about the promotions.	Stapel scale	74% of respondents consider it helpful from 5 to 10 on degree from 0 to 10.	Not Rejected

4.2 Discussion of results

To demonstrate how research questions stated in this study have been answered with this work, the obtained results compared with literature studied. It appears that 40% of customers consider atmosphere in the supermarket poor and visit it because of proximity (29%) and good prices (29%). In this point company should improve as according to Murray (2013) people prefer to shop in environment, that doesn't bring more stress to there lives. Results regarding online whopping and self-service are in line with Drucker (1954) who is convinced that it is customer who determines what a business is, since 69% do not shop online at all and 66% will always prefer the physical store for grocery shopping. Concerning self-services, people would like to have self-service systems in bakery (70%) and cheese and charcuterie (66%) but they would like to be serviced by a person in fresh meat (79%) and fresh fish (87%), so Pingo Doce have to adjust to it. Findings about private brand of Pingo Doce are in line with suggestion of Murrey (2013) that products selection requires deep understanding from a company of what the customer wants, as 94% of customers buys private brand and only in alcoholic beverages (15%) and personal care (14%) categories they prefer to stay loyal to A brand. 49% of customers stated that it is enough or somewhat enough communication on a one-to-one bases, which is in line with Peppers & Rogers (2011) and his work about managing customer relationships and identifying customers as unique addressable individuals. From the other hand 26% of customers think that communication is not personalized enough and 22% think that it is not personalized at all, that is field for improvement according to Zafer (2015), and his view on sustainable customer experience. 81% of the customers want to be aware about changes Pingo Doce is making to make customers' lives easier and 74% of customers willing to write reviews and feedbacks more, if they will know, that their voice can bring changes, which is in line with the book "The Path to Customer Centricity" by Denish (2006), where he states that customer centricity is about creating dual value from a company and the customer. 76% of respondents would like to be able to receive valuable information from any member of team in the supermarket and 53% stay indifferent to “Poupa Mais” card showing inadequate level of satisfaction, which is in line with Roy & Melewar (2016) their book about smart customer experience in retail. 56% of customers do not like to share their private information online, but 47% read reviews about the products, if they are not sure in them and 40% participate in discussions in social networks, which is in line with analysis by Zhitomirsky-Geffet & Blau (2016) of predictive factors of addictive behavior in smartphone usage.” From the other hand there is opposite result, according to which 38% of customers have never visited the site of Pingo Doce and 33% of them do not visit it on regular basis. But this could be explained by the fact that even when dependency of consumers from technology is increasing, visits to the official sites of the companies is reducing, as the transfer all information to the social networks to get closer to the consumers. Finally, 74% of respondents consider helpful the app of the company with characteristics, that were described above, which is in line with Zafer (2015), who describes developing technologies as the opportunity of the easier connection and building strong relations with customers. Also, as 15% of respondents belongs to generation Z, interest in the application can be explained by Priporas & Fotiadis (2017), who describe them as focused on innovation and by Wood (2013), and their characterization by trends like interest in new technologies and insistence on ease of use.

CONCLUSIONS AND RECOMENDATIONS

Considering all of the above, all of the research questions were analyzed and answered during this study. Based on them hypotheses were formulated and checked in order to come up with necessary managerial implications. Therefore, company requires changes in several areas: in-store experience, communication with the customer, implementing separate promotions and improvement of social strategy of the company.

All findings agree with reviewed literature, as both sides – company and customers feel that experience is the essential ingredient for sustainable and trustful cooperation. That is why the results show that relationships between Pingo Doce and its’ customers could be and should be developed more in a customer-centric way - there is a large area, how company can bring more positive emotions to the customers, and to increase contributions from their side.

In order to improve customer-centricity in Pingo doce, different strategies were developed relying on the results. They include: improvement of communication with customer; of in-store experience (special script for teams in the supermarkets, feedback system, self-services, price control, special checks with recipe in certain occasions); separate promotions (personalized coupon programs, promotion stickers, private brand communication); improvements of social strategy of the company and mobile application.

1) To improve communication with the customer with objective to encourage customers to leave more feedbacks and let them know that company cares about them, it is important for Pingo Doce once in a period of time (monthly or quarterly) release update in the social media and in booklets with information what company has changed according to feedbacks of the costumers. This can provide greater visibility of the company and will not only help to keep current customers, but also may lead to getting new ones.

2) To improve in-store experience of the customer could be developed five ongoing initiatives.

2.1) For all team in supermarkets special script should be developed, which will describe who is responsible for each question that may arise in order to be able to help the customer to get useful information from any member of a team. In which cases a worker should tell customer to call customer support, when to ask human recourses or check the website, when to call manager of the supermarket. In that way even if a worker will not know necessary information, he or she would have enough knowledge tell the customer where he or she can find it. Aim of this initiative is to keep current customers and make them feel comfortable in the store.

2.2) Company should improve the feedback system in the supermarkets. Currently the option to leave feedback about shopping experience is available only for people who pay for their purchases with card. To make this service available for those who pay with cash next to the cash-desk could be instilled electronic machines with different smiles that represent quality of service.

To get detailed information about customer satisfaction for those who obtain the app and the loyalty card, the notification on mobile phone after a purchase was made could appear, where person can rate the service and add any comment. This initiative, aimed to keep current customers will help company to get more information about them and at the same time will provide an opportunity to leave feedbacks easily.

2.3) To show customer-centricity of the company and to keep current customers Pingo Doce should take under control quality of tags with prices in supermarkets. Sometimes when there is an offer, price “before” is higher than it actually was before. And the old price-list is not removed. (refer to Appendix 6 for the real-life example.)

2.4) With objective to keep and grow current customers, self-service in bakery area should be implemented as data shows that customers do not want to stand in a queue when they need to take amount of bakery that is different from prepackaged options. Practice of as Lidl or Minipreço can be used, where customers can and take nessesary amount of fresh bakery from the glass covered shelves with special tongs, which is fast, clean and comfortable.

2.5) When person is buying fresh fish or meat additional check could be printed with information about storage conditions and recipe for meet or fish that was chosen. This will help to keep and grow current customers, as they will be pleased to see that company is not just selling the product, but also taking care of his or her satisfaction with the purchase. After the recipe on the check should be printed invitation to visit the section of recipes in the site or app of Pingo Doce.

3) To improve social strategy that will help company get, keep and grow customers. Pingo Doce can create it’s own network for customers. Company pays a lot of attention to the recipes on the site and according to the data this area is deprived of attention. The customer can get an opportunity to create his or her own profile with the ability to add own recipes, using the products from Pingo Doce, comment, discuss, add to favorites list and put information about preferences to make preferred recipes appear. With the “Poupa Mais” card, the account will be connected to it and company will get access to the preferences, to use this data in making

personalized offers. Moreover Instagram account with recipes can be created. This will boost customers to communicate with each other and will increase the awareness of the Pingo Doce.

4) For company to increase customer-centricity following three initiatives can be implemented.

4.1) To improve personalized communication and inspire consumers to try related to their usual purchase higher-priced products and therefore to keep and grow customers, a money-off coupon program should be implemented. Physical coupon can be sent through direct male. The system can be similar to the practice of Kroger. Each mail will contain 12 designed coupons customized for each family. It will contain of one non-ordinary product; basic products that customer used to buy; and two experiments of the private brand. Coupons can also be copied in the app, for people who find it easier to scan their mobile phone and not to take physical papers to the supermarket.

4.2) Second promotion campaign is implementing in order to get new customers attention and to keep customers interested in Pingo Doce. The customer should collect some number of stickers that are given each time when he or she makes a purchase. Stickers should be stuck into a special book. For different number of collected stickers customer will have an opportunity to get a big discount on some products. The more number of stickers the person stick, the more will be the value of a product on which he or she will get a discount.

4.3) Lastly, currently there is a problem with a communication of private brand, that is why this initiative is aimed to encourage people to try brand of Pingo Doce and at the same time to build larger shopping basket therefore the objective is to keep customers and grow them. Supermarket will offer people additional savings while buying products of private brand on this conditions: if person buys 4 products of Pingo Doces' own brand he gets a return on his loyal card in amount of 1 euro, if he buys 6 products, he gets 1,5 euros, eight products equal to 2 euros, 10 to 2,5 euros and so on. This initiative will drive brand awareness and invite customers to try products.

5) Last suggestion that can be given in order to help the company become more customer centric, is continue developing the app. Mobile phone today is the essential part of life of a human, using which he or she can get necessary information from anywhere any time. It is worth

it to use an app for Pingo Doce to become closer for its customers and keep and grow them, by using it. The last update on the android was almost a year ago on 20/07/2016 and on ios it was on 17/05/2016. On bough systems it has low rating, 3,5 and 2,5 stars out of 5 correspondingly. Therefore it is necessary to develop the app more and make it visible and useful for customers. 5.1) Establish trouble-free operation. Offers that connected to the card appears only in special menu and since middle of April 2017 until 10 of may 2017 according to users feedbacks this section is empty, although offers exists. 5.2) Create a list of loyalty card promotions with explanations how to use them and include timing available for each promotion to know how long it lasts. To illuminate the problem of misunderstanding which promotions is available, if someone from the family will use the promotion it will cross out. 5.3) Add the recipe section with the same features as on site (with chance to add them, pick favorites and comment). Also as Pingo Doce position itself as supermarket with fresh food and hence healthy, add an option to plan meal for a weak or for necessary period. After the receipt is added to favorites, person can tic necessary products in the receipt, and they will be automatically appear in the shopping list. 5.4) Improve shopping list by adding pictures to products that customer can choose. When the person starts typing the name of a product he or she wants to buy, pictures of Pingo Doces' products appear and among them the person should see promotions of the day on this product, if there is any. Company can not only take the data about frequent purchases from the card, but also if a person does not have one, from the app. 5.5) The bar code of the loyal card should be added to the app, so if the person forgets it, he could scan it through the mobile phone. 5.6) If the app will require some personal information about the customer, add section with explanations why it is asking for each piece of information so the customer will fill save and will not mind to hand it over to let company use data to personalize his or her shopping experience.

Taking in consideration the results of this study based on literature and on all qualitative and quantitative analyses that were made, strategies and proposals that were developed will put Pingo Doce at the forefront of supermarket retail in Portuguese market.

LIMITATIONS AND FURTHER RESEARCH

This research has several limitations. Firstly, in the qualitative stage only five personal semi-structured interviews were conducted with representatives of five different departments of Pingo Doce that means that some inside information could be missed. Secondly, in the quantitative stage friends, the social network, and members of Nova SBE Facebook groups were invited to participate in the online survey that is why results mostly represent opinion of people living in Lisbon and only those who speaks English. What is more, research was focused mostly on specific aspects of customer relationship, such keeping existing customers and growing them, and getting new customers aspect was just slightly mentioned. Lastly, this study was performed in a time constraints.

As Pingo Doce exists in a globally connected world where competition is constantly growing and customer expectations are always changing, further research should pay into consideration. It is important to continuously monitor changes in the retail environment and consumers behavior. All market trends that will arise should be analyzed to identify potential wishes of customers. And all customer-centric strategies that are currently implemented in the work of the company should be constantly monitored with the appropriate KPIs and changed or removed according to the results. To examine communication with the customer relationship freshness metrics (to track last interaction with clients) and funnel drop-off rate key performance indicators (how many customers unsubscribe from the newsletters you send out, how many read the emails) can be used. For in-store experience strategies should be used such KPIs as percentage of questions answered/problems solves at the first contact, number of monthly complaints and average time needed to solve a problem. For promotions: revenues for Pingo Doce store / month, profit resulting from these additional promotions/ month and number of coupons used (in total and per type of coupon) / month. And for social strategy: number of answered comments, time it takes to answer comments / feedbacks, number of followers, number of likes, comments and shares.

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APPENDICES

Appendix 1. External environment of grocery retail market in Portugal

Table 2: Grocery Retailers: Value sales, Outlets and selling space 2011-2016

	2011	2012	2013	2014	2015	2016
Value sales EUR million	20,269.1	19,975.9	20,466.7	20,304.1	20,630.5	21,316.5
Outlets	38,318.0	36,752.0	35,507.0	34,424.0	33,833.0	33,295.0
Selling Space '000 sq m	5,468.4	5,299.8	5,288.7	5,246.9	5,255.1	5,238.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3: Grocery Retailers GBO Company Shares: % Value 2012-2016

% retail value rsp excl sales tax

Company	2012	2013	2014	2015	2016
Jerónimo Martins SGPS SA	15.5	15.7	16.3	17.1	17.2
Sonae SGPS SA	15.2	16.1	16.7	16.7	17.0
Auchan Group SA	7.2	6.8	6.6	6.7	7.0
ITM Entreprises SA	7.0	6.7	6.6	6.5	6.5
Schwarz Beteiligungs GmbH	5.5	5.5	5.7	5.6	5.5
Distribuidora Internacional de Alimentación (Dia) SA	4.0	3.9	3.5	3.4	3.1
E Leclerc	2.5	2.3	2.3	2.2	2.2
Galp Energia SGPS SA	0.5	0.5	0.5	0.5	0.5
Aldi Group	0.5	0.5	0.5	0.5	0.5
Covirán SCA	0.4	0.4	0.5	0.5	0.5
El Corte Inglés SA	0.4	0.4	0.5	0.5	0.5
Repsol SA	0.4	0.4	0.4	0.4	0.4
British Petroleum Co Plc, The	0.4	0.4	0.4	0.4	0.4
Internationale Spar Centrale BV	0.2	0.3	0.3	0.3	0.4
Cepsa Estaciones de Servicio SA	0.2	0.1	0.2	0.2	0.2
Nestlé SA	0.1	0.1	0.1	0.1	0.1
Oxy Capital - Sociedade Gestora de Fundos de Capital de Risco SA	-	0.0	0.0	0.1	0.1
ParSuper - Serviços de Gestão, Logística e Participações, Lda	-	-	0.1	0.1	0.1
Carrefour SA	-	-	-	-	-
Grupo GCT	-	-	-	-	-
Others	40.2	39.7	38.9	38.1	37.9
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4: Grocery Retailers GBN Brand Shares: % Value 2013-2016

% retail value rsp excl sales tax

Brand	Company (GBO)	2013	2014	2015	2016
Pingo Doce	Jerónimo Martins SGPS SA	15.5	15.9	16.5	16.6
Continente Modelo	Sonae SGPS SA	8.1	8.5	8.5	8.7
Continente	Sonae SGPS SA	6.9	6.6	6.5	6.6
Intermarché	ITM Entreprises SA	6.7	6.6	6.5	6.5
Jumbo	Auchan Group SA	5.8	5.6	5.7	6.0
Lidl	Schwarz Beteiligungs GmbH	5.5	5.7	5.6	5.5
Minipreço	Distribuidora Internacional de Alimentación (Dia) SA	3.9	3.5	3.4	3.1
E Leclerc		2.3	2.3	2.2	2.2
Pão de Açúcar	Auchan Group SA	1.0	1.0	1.0	1.0
Continente Bom Dia	Sonae SGPS SA	0.8	0.9	0.9	1.0
Meu Super	Sonae SGPS SA	0.3	0.6	0.7	0.8
Amanhecer	Jerónimo Martins SGPS SA	0.2	0.4	0.6	0.6
Tangerina	Galp Energia SGPS SA	0.5	0.5	0.5	0.5
Aldi	Aldi Group	0.5	0.5	0.5	0.5
Supermercados Covirán	Covirán SCA	0.4	0.5	0.5	0.5
Supercor	El Corte Inglés SA	0.4	0.5	0.5	0.5
Sprint/ RepShop/ Basic	Repsol SA	0.4	0.4	0.4	0.4
BP Connect/BP Express/BP Shop	British Petroleum Co Plc, The	0.4	0.4	0.4	0.4
Spar	Internationale Spar Centrale BV	0.3	0.3	0.3	0.4
Depaso	Cepsa Estaciones de Servicio SA	0.1	0.1	0.2	0.2
Others		39.9	39.1	38.4	38.2
Total		100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Appendix 2. Qualitative research conclusions:

1. Perception of Pingo Doce's focus on customers.

All interviewees (5/5) consider Pingo Doce as a very customer-centric company. And almost all of them (4/5) can immediately provide a lot of examples to prove their opinion.

2. Measurement of the success of initiatives with customers of Pingo Doce.

Sales (4/5) is the most mentioned criteria to measure the success of initiatives with customers of Pingo Doce. Feedback (2/5) and market share (2/5) also plays an important role. Additionally nu,ber of tickets, sensory analyses, in-store research and special companies that provide data were mentioned. One of interviewees mentioned that Pingo Doce "does not accurately measures the success of initiatives as it lacks data".

3. Comparison of the work in meeting customers' needs between Pingo Doce and its competitors.

Majority of the interviewers (4/5) believe that Pingo Doce does a better job than its competitors. One person has an opinion that "concerning the data analyses Pingo Doce is behind its competitors". Continente is the main competitor of Pingo Doce (5/5). Lidl is also growing a lot (3/5).

4. Awareness of initiatives with customers in other supermarkets.

Initiative "Gang dos frescos" by Lidl (2/5) and self-service bakeries (1/5) were mentioned. In terms of communication Lidl is perceived as a tuff competitor, while Continente as not a direct competitor (1/5). Also several initiatives by Continente were mentioned (2/5): physical personalized coupons and process of buying fresh fish. One person believes that Pingo Doce "should better communicate private brand". And all interviewees who aware about any initiatives want to implement similar ones in Pingo Doce (5\5).

5. Initiatives in other retail companies that could be applied in Pingo Doce.

"Fnac is very good in online channel but Pingo Doce already once opened it, and it was not successful" (1/5). That is why now the company just study the market for new opportunity. Also

Fnac is good at conducting surveys, that is a “good way of getting proactive feedback” (1/5). “BP good in very focused on the customers loyalty and the suggested sale” (1/5) and the interviewee is interested to implement the same in Pingo Doce.

6. Procedures to analyze customer satisfaction on regular basis.

Analyses of feedback of customers considered being the most valuable procedure to analyze customer satisfaction on regular basis (4/5). Satisfaction enquiry was also mentioned (2/5): for private brand department it analyzed every year and it is done only for people who pay for their purchases with cards. Also private brand department analyze customer satisfaction with use of feedback of a sensory analysis and commercial team use sales.

7. Accessibility of the information concerning influence of report analysis on the department performance.

Some departments state that they either not have access at all (2/5) or get a lot of irrelevant data that can not lead to any changes (1/5). Customer care department uses the results in work but can not share the results of analyses with other departments effectively. And in commercial team all excess to data is available and “changes are visible”.

8. Main problems in communication between buyers and Pingo Doce.

Most of complains of the customers related to technical problems with the loyalty card, also some complains connected with misunderstanding of promotions (1/5). Also interviewees see the imperfection of the information flaw: some complains can be lost if they arise in the supermarkets and noticed by store managers or store team is not trained enough to provide necessary information for the customer, process of getting feedback could be improved (3/5).

9. Typical customer that comes to Pingo Doce store.

Live near the store (3/5), working housewife (3/5), 30-55 years old (minimum and maximum of mentioned), “buys at least once in a week, low basket” (1/5), “want service during the day and self-service after working hours” (1/5), “very price sensitive, but choose PD for price perception, quality perception and proximity” (1/5), “impulsive purchaser” (1/5).

Table 5: Qualitative research analyses.

Questions		Stores operation department	Customer care department	Layout team	Private brand department	Commercial team
How do you perceive Pingo Doce to be focused on customers on your perspective?	"Quote"	“That is the reason why we exist” “Pingo Doce is very focused on customers” “CEO of the group, when we meet with them, like twice a year, he always says that we should be ahead of the consumer”	“Customer is the reason of our existence” “Very concerned about what are the costumer needs and tries to address those needs” “Changed from high-low to an every day low price promotion and than into promotions” “Changed the promotions leaflet” “Always providing some feedback and some insights of what the customer tell us in order to improve some processes internally” “The receipt was also chanced a lot of times”	“PD is focused on presenting the customers what they value the most about our stores” “Showing to the costumers what they expect from us” “fresh food oriented company” “promotional offer”	“Pingo Doce is always looking to offer the best shopping experience to the customer” “I can see in every measure in every action we take to improve a business.” “Concerning the private brand our objective is to offer the best price that quality can have.” “Updated to customers needs, to market trends.” “We have a wind range of lactose free of our private brand” “Designing packages to become more appealing, more easy to use or to store more modern” “We look at the formula, if we should redesign it.”	“It is very important to be customer focused” “In store the managers are very responsible for this” “In the commercial team what we can do is always to seek for better products with the better prices” “We also have targeted offers, like we are doing sms with exclusive promotions and we are starting with the pilot of coupons as a paper that goes after check.” “We target people by purchasing habits”
	Interpretation	The person thinks that PD is very customer-centric, but mostly from the words of headquarters.	The person thinks that PD is very customer-centric, and provides a lot of examples of that.	The person thinks that PD is strongly oriented on customers	The person thinks that PD is focused on customers in all sides of its business. And provides a lot of examples concerning private brand.	The person thinks that PD is focused on customers. The stores managers responsible for it in stores and commercial team negotiate with suppliers to get the better products with the best price. Some examples are given.

How do you measure the success of initiatives with customers of Pingo Doce?	"Quote"	“With data, but not as deeply as we could in order for the target to be precisely right.”	“With sales, market share, costumer feedback.” “Voice channel is around 60%. Than email. Social media is still small, because we launched an official Facebook web site this year”	“The sales and the sales mix” “Customer interviews, some customers feedback” “Number of tickets”	“Day-to-day information namely sales. How we are performing verses last year, verses last week, how is the share of the private brand going.” “Periodical sensory analyses plan in which we are going to the market and ask our customers to come to the laboratory, try our product” “Once a year research, in which we are going to the store and we ask our customers what they think about our private brand” “Feedback from other departments, social media, Nilson and Kantar.” “Matching of internal and external data.”	“Sales” “Commercial equation. Which is like you divide sales by number of clients times the spend of the clients and than the spend of the client times frequency times spend per transaction (units or price).”
	Interpretation	The person thinks that PD in not accurately measures the success of initiatives as it lacks data.	Success of initiatives analyzed with sales, market share and feedback, the main source of which is voice channel.	Success of initiatives analyzed with sales, sales mix, interviews, feedback, and number of tickets.	Sales, share of private brand, sensory analyses, in-store research, social media, Nilson and Kantar. Departmant match internal and external data.	Sales, commercial equation (which include time, frequency, units, price).

From your own perceptive, do you think that Pingo Doce does a better job of meeting customers' needs than its competitors?	"Quote"	"What concerns data analyses we have started after them, but we are going on the right direction and will arrive quickly" "Our main competitor is Continente" "Also Lidl, as they have very strong private brand for affordable prices. They are starting to change" "Continente is one that has the size more similar to ours."	"A better job than our competitors. As we have been increasing the market share for more than 5 years in a row" "We will win again in this year because we are very close to be the market leader as a whole." "Fighting the leadership with the Continente."	'We have to believe we do" "Continente at least to be a little bit more static than we are regarding the layouts. They don't test as match." "I don't see them doing this as fast and as well as we do." "Lidl as our competitor but more in the proximity"	"I think yes" "Market share has been increasing" "We have been perceived as the best private brand of all retail market in the last 5 years" "Challenge to find a way to keep a leadership." "Lidl is also growing up in Portugal."	"Of course" "In terms of promotions we are really aggressive" "Biggest competitor is Continente because it is the biggest player" "Second biggest it is Lidl because it is the proximity store it is a discount. But they don't have an assortment that many people like, you cant bought everything there"
	Interpretation	Concerning the data analyses PD is behind its competitors. Lidl is good in private brand and productivity of changes, but the main competitor is Continente.	PD does a better job, than its competitors. It is very close to become a market leader as a whole. This answer was based on the market share. It is fighting the leadership with Continente.	PD is doing its' job faster than competitors. Main competitor is Continente.	PD does a better job, than its competitors. In private brand and in total. Main competitor is Continente, but Lidl is also growing.	PD does a better job, than its competitors. Main competitor is Continente, the second one is Lidl

Are you aware of initiatives with customers in other supermarkets?	"Quote"	"In Continente that aloud consumers to choose their fish. And than go when they do their shopping and then they collect their fish after it's all catted and prepared at the end so I am thinking of implementing it."	"In terms of communication with customers Continente is the most dynamic" "Lidl becoming a tuff competitor" "Continente has larger source than us, so we don't compete directly in terms of store experience or customer experience" "Lidl, the "Gang dos frescos", "Every time you bought in Lidl you earn some points, that you could switch for toy. And it was like a collection. So it pushed sales. We are also thinking about doing similar"	"Lidl has some self-service bakeries with freshly made bread." "This is very fast, very clean you can look at the product" "And maybe we should try to do something similar but not exactly the same."	"We keep up with the market" "Shopping", "Visiting stores but more academically", "Consumer feedback", "Google" "We need to improve our way how we communicate private brand in our store." "We have a stopper but sometimes it doesn't work very well." "Inermarche also do some small sponsoring in the private brand also in the store." "Be more communicative."	"That that idea of Lidl is good with toys. Pingo Doce is going to do something similar" "Continente has physical male than it has personalized coupons with exclusive promotions to the certain type of clients" "Some more present in TV"
	Interpretation	Continente has a good initiative and the interviewee is interested in implementing it in the supermarket where he works.	In terms of communication Continente is the leader, but as it is not a direct competitor, in terms of initiatives Lidl is a tuff competitor. It had the "Gang dos frescos" initiative and PD is planning to do the similar one.	Self-service bakeries with freshly made bread in Lidl. The interviewee wants to do something similar in PD.	There are different ways to get data about initiatives in other supermarkets: shopping, visiting stores academically, consumer feedback, Google. PG should better communicate private brand.	"Gang dos frescos" by Lidl, physical personalized coupons from Continente and TD ads.

Did you hear about initiatives that you like in other retail companies that could be applied in your company? If yes, can you give an example of this kind of initiatives.	"Quote"	N\A	"They are working faster on the online channel." "Fnac I think already delivers in a couple of hours." "We were the first to launch the online channel, but we were very early. So we shout down" "It was the same with the loyalty, but now we have Poupa Mais" "Despite it is a trend the market is not big enough in order to make it profitable. We are studying it in order to see the volume gets interesting."	"BP" "Points system and the customer loyalty card" "People in the cashiers very focused on the customer loyalty card and the suggested sale" "We could learn from them."	"All personalized communication is a good initiative." "Fnac, if you buy something online and than fill a short survey"	"I don't remember of any example"
	Interpretation	N\A	Fnac is very good in online channel, but PD already once opened it, and it was not successful. Now they are studding if it will be profitable to launch it again some day. But now it is not in their plans.	BP good in very focused on the customers loyalty and the suggested sale. The interviewee wants to do the same in PD.	All initiatives based on personalized communication is a very good idea. Surveys in Fnac is a good way of getting proactive feedback.	N\A
What procedure are you aware of to analyze customer satisfaction on regular basis?	"Quote"	"Question that you should put to headquarters" "Big research every 4 years and a smaller one in the middle" "focus groups" "Poupa Mais"	"We analyze complains we have every month, every week, and we also have at the checkouts, we have like a small satisfaction enquiry that the people after paying can answer." "Mystery clients' research"	"We get feedback from customer supports "We get from market studies the data of how we are doing in market share weakly" "We only get it when they have something relevant for us. I believe that… I don't know ... every 2 months we get at least 1 customer feedback"	"Feedback in our everyday work." "Consumer satisfaction index from market research that we analyze every year and feedback of a sensory analysis"	"Just sales and equation." "We have promotion every week so it is a continuous process" "We communicate with customer care department. Sometimes we help them to understand why the client is complaining. I don't know how often we get this information"

	Interpretation	The interviewee is not aware of procedures to analyze customer satisfaction.	Two main procedures are analyses of feedbacks and results of satisfaction enquiry. (Enquiry is done only fore people who pay with cards).	Feedbacks (when customer care have something relevant) and weakly analyses of market share from market studies.	Feedbacks in everyday work, consumer satisfaction index that analyzed every year and feedback of a sensory analysis.	Sales and equation. Sometimes communication with customer care department.
Do you have excess how this analyses shape the activities of your department?	"Quote"	“At the store level we do not have access to the results of analyses. “Some insights in the management meetings.”	“Unfortunately all of reporting that we have in here is still very manual.” “Looking for better tools and applications, that have already some automatic reports” “We produce information quarterly and we cannot produce more in between.”	“We have some data less relevant, some very little questions that are not decisive but every 2 months I believe we get something that made us to change something in our stores.”	“From the customer care department we don't have very structured information to analyze”	“If a complain is a good point we may change something. Regarding the promotions if it doesn't go well, so we don't do it anymore.”
	Interpretation	Almost no access	Department uses the results of analyses in work, but can not share them with others effectively.	Not all data that department get is relevant, but sometimes it leads to changes in stores.	No ability to analyze data from customer care department	Excess to data that available in this department. Changes are visible.

What are the main problems that you can think about, in communication between buyers and your company?	"Quote"	N\A	“Related to our loyalty card, the Poupa Mais as we increasing a lot the 121 communications and promotions” “2/3 of the times its our fault, technical issue, 1/3 its customers fault” “Not have yet a real powerful tool to segment 121” “We are only working with some profiles. And for that we are already having some technology problems” “Testing new applications: coupons” “Offers at the category level, or that makes you spend more. They read what you just paid and after your receipt goes, it goes right after”	“Channels to get customer feedback” “Not do this very well locally in the store” “The store team is not as well prepared to answer the questions from the customer that are not “where can I find this or that”.”	“We need to communicate a little better to our customers” “Need also listen and reacting to the feedback better” “Customer care information is very important for us to receive” “Kind of structure where we would see critical point would be very important for us.”	“Only 2% of people unsatisfied complain. So we are loosing 98% of potential good inputs and I don't know how we can overcome it.” “But if a customer complains to a store manager and this information many times lost between the store manager and rest of the company.”
	Interpretation	N\A	Most of the complaints come from loyalty card. And most of the problems connected with technical issue. But also from some misunderstanding in promotions.	Lack of training for the store team concerning feedback and communication.	Need to improve communication with customer in both ways.	Company is not able to get large amount of complains and the information flaw is not perfect.

When you think about the typical customer that comes to Pingo Doce store what is that person like?	"Quote"	"I don't have concrete data" "In the morning housewives and retired people" "In the end of the day working mothers and lots of men" "Small pure neighborhood that usually comes during the week and then on weekends more sophisticated and richer persons." "Families come here to enjoy the restaurant" "Distribution of Pingo Doce is very similar to the Portuguese population."	"Typical customer is a women" "25% of male buyers and 75% were still women" "Between 40 and 65" Social status: "We have come b c d, but more centered on the c" "Buys frequently" "Don't like the hypermarkets "Go at least 1 time a week" "With lower purchases, with lower baskets"	"Live near the store" "During the day people want a lot of service, they want to go to the counters, they want to talk with the butcher and fish seller and they want to ask about the fish and ask about the meat and they want to be served." "After 6 pm after working hours they just want to go to the self service and put things in the trolley and get out as fast as they can." "Over 30 over 50 and after working hours I see more people of 30 years old 30-40 slightly younger kind of customer that is working class customer." "Maybe slightly more women than man."	"Working housewife" "45-55." "Lives in the city near the store. She is very price sensitive, but choose us for price perception, quality perception and also because we are next to where they live or where they work."	"Live near" "Queue of old people at 9 at the morning waiting for the store to open." "Old people go there often." "Young people like until 30 also like Pingo Doce because it is proximity. We don't want to wait or to go far in order to buy our stuff." "Man or women I think both." "We have old ladies, young kids, young mothers or older mothers, we have everything. In Continente are more families. So we share a lot of clients. But more impulsive purchases."
	Interpretation	The interviewee does not have the data, so the description is very personal and based on concrete hypermarket experience.	Women, 40-65 years old, social status – c, buyers at least once in a week, low basket.	Live near the store. Want service during the day and self-service after working hours. 30-50 years old. Working class. Slightly more women than man.	Working housewife 45-55 years old. Lives in the city near the store. She is very price sensitive, but choose PD for price perception, quality perception and proximity	Live near, all ages, impulsive purchases.

Appendix 3. Questionnaire for customers of Pingo Doces.

1. Filter Question: Are you the customer of Pingo Doce? (Dichotomous question: Yes / No)

   If the answer is “yes” – continue the questionnaire

   If the answer is “no” –Stop the questionnaire and “Thank you for your time!”.

2. Is there Pingo Doce shop in your neighborhood? (Dichotomous question: Yes / No)

3. How often do you do grocery shopping? (Multiple choice: once in 2 weeks, once a week, twice a week, three times a week, four or more times a week)

4. Distribute 100 points between the following reasons that most make you go to Pingo Doce. (Constant Sum Scaling: proximity / good prices / fresh healthy food / good quality of the products / atmosphere in the shop/ good loyalty system)

5. Would it be useful for you to be able to receive valuable information from any member of the team in the supermarket? (Dichotomous question: Yes / No)

6. Which of the following best describes your view of Pingo Doce’s communication with their customers, on a one-to-one basis? (Likert Scale: It is not enough communication/ Somewhat it isn´t enough communication/ Indifferent/ Somewhat it is enough communication/ It is enough communication)

7. Would you like to know about changes Pingo Doce is making to make customers’ lives easier? (Dichotomous question: Yes / No)

8. Do you buy any products from the private brand of Pingo Doce? (Dichotomous question: Yes / No)

   If the answer is “yes” – continue the questionnaire;

   If the answer is “no” – go to question 12.

9. In which of the following categories do you by Pingo Doce private brand products? (Multiple choice: baby-food/ baby-care/ beverages/ charcuterie/ frozen food/ fresh vegetables/ fresh fruits/ meat/ berries/ personal care products/ dairy/ coffee capsules/ coffee machines/ grocery/ ready meal/ alcoholic beverages)

10. In which of the following categories are you loyal to brands that are not Pingo Doce? (Multiple choice: baby-food/ baby-care/ beverages/ charcuterie/ frozen food/ fresh vegetables/ fresh fruits/ meat/ berries/ personal care products/ dairy/ coffee capsules/ coffee machines/ grocery/ ready meal/ alcoholic beverages)
11. Which of the following best describes your desire to read reviews about the product you can find in a grocery shop that you already have bought or just planning to buy? (Multiple choice: I constantly read reviews about the products / I read reviews only if I am not sure in the product I am buying / I don’t read reviews)
12. Which of the following best describes your desire to discuss in the Internet with other people what you like and what you do not like about the particular product they bought? (I love to write reviews about things I buy and discuss them on forums or special groups / Sometimes I discuss it with my friends on my social pages / No, I never share my private information online)
13. Will you be more willing to write reviews and feedbacks if you will know that your voice can bring changes? (Dichotomous question: Yes / No)
14. To which extent do you think communication between Pingo Doce and customers is personalized, in the sense that you receive offers about the products you usually buy and are interested in, on a scale of 1 – Not personalized at all to 5 – Very personalized? (Likert Scale: Not personalized at all / Not personalized enough / Indifferent/ Personalized enough / Very personalized)
15. Do you shop online? (Dichotomous question: Yes / No)

    If the answer is “no”– go to question 18;

    If the answer is “yes” – go to question 19.
16. What is the reason that makes you not to shop online? (Open-ended question)

    After asking this question go to question 21.
17. Do you do online grocery shopping? (Dichotomous question: Yes / No)

If the answer is “no”– go to question 21;

If the answer is “yes” – continue the questionnaire.

18. How often do you do online grocery shopping? (Multiple choice: once a month/ less often than once in a month/ once in 2 weeks/ once a week/ twice a week/ three times a week/ 4 or more times a week)

    After answering this question go to question 21.

19. What is the reason that makes you not to do grocery shopping online? (Open-ended question)
20. If the process of ordering online will be intuitive and delivering will be reliable, will you rather shop online than go to the physical store of Pingo Doce? (Dichotomous question: Yes / No)
21. To which degree are you satisfied with the Poupa Mais card? (Likert Scale: Extremely satisfied/ Somewhat satisfied/ Neither satisfied nor dissatisfied/ Somewhat dissatisfied/ Extremely dissatisfied)
22. Concerning the following areas of the supermarket, please mark the type of service you prefer. (Likert matrix table. Options: bakery, cheese and charcuterie, fresh meat, fresh fish; service options: serviced by a person (implies taking a ticket and waiting in line), self-service (picking from pre-packaged options).
23. How often do you visit website of Pingo Doce? (Multiple choice: several times a week / once a week / several times a month/ I do not visit the website on the regular basis/ I have never visited the website) If the answer is “I have never visited the website” go to question 26. If the answer is anything but “I have never visited the website” continue the questionnaire.
24. What information do you usually look for on the site? (Constant Sum Scaling: Distribute 100 points among the statements below. Information about the company / booklets /

recipes / prices / offers / information about loyalty card / looking for a telephone number to leave a feedback/ products)

25. Think about Pingo Doce own app. If you can find there: section with recipes made by company and other people, where you can add your own or save your favorites or plan your meal for a period of time; comfortable to fill shopping list, that will offer promotions on products you want to buy. It is connected with your loyal card, so you can use the bar code from the phone instead of it and it reminds you about the promotions.
    To which extent do you think it could helpful for you or not? on a scale a 1 – not at all to 10 – extremely helpful (Stapel skale)
26. Are you male or female? (Dichotomous question: female / male)
27. How old are you? (Open-ended question)
28. What is your occupation status? (Multiple choice: middle and top management/ specialized technicians and small business owners/ employees of tertiary sector/ qualified or skilled workers/ unqualified or unskilled workers / retired or unemployed/ students/ housewives).

Appendix 4. Sample composition and its descriptive statistics

4.1 Demographic variables: age, gender, and nationality

	Average age	Minimum age	Maximum age
Age	34	20	63
		Absolute frequency	Relative frequency
Occupation status	Middle and top management	10	6%
	Specialized technicians and small business owners	26	17%
	Employees of tertiary sector	12	8%
	Qualified or skilled workers	32	21%
	Unqualified or unskilled workers	3	2%
	Retired or unemployed	4	3%
	Students	39	25%
	Housewives	28	18%
Gender	Male	30	19%
	Female	124	81%

4.2 Descriptive statistics

		Absolute frequency	Relative frequency
Are you the customer of Pingo Doce?	Yes	154	96%
	No	7	4%
Is there Pingo Doce shop in your neighborhood?	Yes	128	83%
	No	26	17%
How often do you do grocery shopping?	Once in 2 weeks	20	13%
	Once a week	54	35%
	Twice a week	49	32%
	Tree times a week	16	10%
	Four or more times a week	15	10%
Would it be useful to be able to receive valuable information from any member of the team in the supermarket?	Yes	117	76%
	No	31	24%
View of Pingo Doce's communication with their customers, on a one-to-one basis?	It is not enough	13	8%
	Somewhat it is not enough	22	14%
	Indifferent	44	29%
	Somewhat it is enough	35	23%
	It is enough	40	26%
Would you like to know about changes Pingo Doce is making to make customers' lives easier?	Yes	125	81%
	No	29	19%
Do you buy any products from the private brand of Pingo Doce?	Yes	144	94%
	No	10	6%
In which of the following categories do you by Pingo Doce private brand products?	Baby-food	9	1%
	Baby care	10	2%
	Beverages	50	8%
	Charcuterie	41	6%
	Frozen food	56	9%
	Fresh vegetables	79	12%
	Fresh fruits	74	11%
	Meat	87	13%
	Personal care	41	6%
	Dairy	64	10%
	Coffee machines	1	0%
	Coffee capsules	11	2%
	Grocery	74	11%
	Ready meal	37	6%
	Alcoholic beverages	21	3%
In which of the following categories are you loyal to brands that are not Pingo Doce?	Baby-food	21	4%
	Baby care	21	4%
	Beverages	36	7%
	Charcuterie	25	5%
	Frozen food	22	5%
	Fresh vegetables	29	6%
	Fresh fruits	30	6%
	Meat	30	6%
	Personal care	68	14%
	Dairy	41	8%
	Coffee machines	25	5%
	Coffee capsules	34	7%
	Grocery	23	5%

	Ready meal	12	2%
	Alcoholic beverages	71	15%
Which of the following best describes your desire to read reviews about the product you can find in a grocery shop that you already have bought or just planning to buy?	I constantly read reviews about the products	15	10%
	I read reviews only if I am not sure in the product I am buying	72	47%
	I don’t read reviews	67	44%
Which of the following best describes your desire to discuss in the Internet with other people what you like and what you do not like about the particular product they bought?	I love to write reviews about things I buy and discuss them on forums or special groups	6	4%
	Sometimes I discuss it with my friends on my social pages	62	40%
	No, I never share my private information online	86	56%
Will you be more willing to write reviews and feedbacks if you will know that your voice can bring changes?	Yes	114	74%
	No	40	26%
To which extent do you think communication between Pingo Doce and customers is personalized in the sense that you receive offers about the products you usually buy and are interested in	Not personalized at all	34	22%
	Not personalized enough	40	26%
	Indifferent	56	36%
	Personalized enough	15	10%
	Very personalized	8	5%
Do you shop online?	Yes	47	31%
	No	107	69%
What is the reason that makes you not to shop online?	Don't like	12	11%
	Not used to	6	5%
	Complicated	4	4%
	I prefer to see the products (do not trust in quality of products through delivery)	43	40%
	Don't want to pay for delivery	4	4%
	There is no need (have the store near)	32	30%
	Security reasons	3	3%
	No time to wait for delivery	3	3%
Do you do online grocery shopping?	Yes	16	34%
	No	31	66%
How often do you do online grocery shopping?	Once a month	3	19%
	Less often than once in a month	0	0%
	Once in 2 weeks	0	0%
	Once a week	0	0%
	Twice a week	0	0%
	Three times a week	10	63%
	4 or more times a week	3	19%

What is the reason that makes you not to do grocery shopping online?	I prefer to see the products (do not trust in quality of products through delivery)	14	45%
	There is no need (have the store near)	5	16%
	Don't want to pay for delivery	4	13%
	Complicated	3	10%
	No service	3	10%
	No time to wait for delivery	2	6%
If the process of ordering online will be intuitive and delivering will be reliable will you rather shop online than go to the physical store of Pingo Doce?	Yes	53	34%
	No	100	66%
To which degree are you satisfied with the Poupa Mais Pingo Doce card?	Extremely satisfied	6	4%
	Somewhat satisfied	43	28%
	Neither satisfied nor dissatisfied	82	53%
	Somewhat dissatisfied	19	12%
	Extremely dissatisfied)	4	3%
How often do you visit website of Pingo Doce?	Several times a week	7	5%
	Once a week	26	17%
	Several times a month	11	7%
	I do not visit the website on the regular basis	51	33%
	I have never visited the website	59	38%
Think about Pingo Doce own app. If you can find there: section with recipes made by company and other people, where you can add your own or save your favorites or plan your meal for a period of time; comfortable to fill shopping list, that will offer promotions on products you want to buy. It is connected with your loyal card, so you can use the bar code from the phone instead of it and it reminds you about the promotions. To which extent do you think it could helpful for you or not? on a scale a 1 – not at all to 10 – extremely helpful	0	9	6%
	1	6	4%
	2	6	4%
	3	9	6%
	4	9	6%
	5	27	18%
	6	16	10%
	7	25	16%
	8	16	10%
	9	9	6%
	10	22	14%
		Serviced by a person	Self-service
Concerning the following areas of the supermarket, please mark the type of service you prefer	Bakery	46 (30%)	108 (70%)
	Cheese and charcuterie	53 (34%)	101 (66%)
	Fresh meat	122 (79%)	32 (21%)
	Fresh fish	134 (87%)	20 (13%)

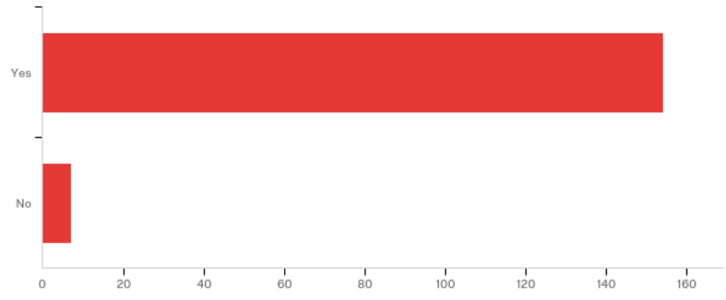
4.3 Descriptive statistics of constant sum questions

Distribute 100 points between the following reasons that most make you go to Pingo Doce	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Proximity	0.00	100.00	29.29	24.99	624.37	154
Good prices	0.00	100.00	28.99	20.32	412.93	154
Fresh healthy food	0.00	31.00	11.37	9.44	89.08	151
Good quality of the products	0.00	60.00	16.87	12.86	165.38	152
Atmosphere in the shop	0.00	50.00	7.18	8.43	71.01	154
Good loyalty system	0.00	50.00	6.75	8.15	66.37	154

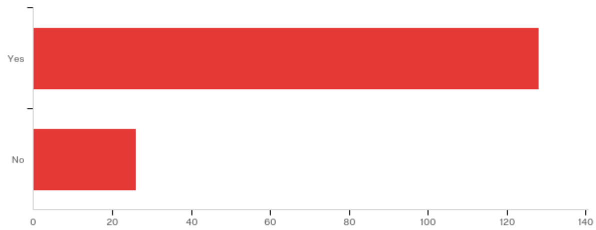
What information do you usually look for on the site?	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Information about the company	0.00	100.00	5.42	16.53	273.38	95
Booklets	0.00	100.00	15.37	24.20	585.77	94
Recipes	0.00	90.00	4.24	13.16	173.19	95
Prices	0.00	100.00	26.22	26.03	677.49	94
Offers	0.00	100.00	32.11	29.22	853.90	94
Information about loyalty card	0.00	50.00	2.86	7.90	62.35	95
Telephone number to leave a feedback	0.00	10.00	0.23	1.24	1.55	95
Products	0.00	100.00	14.32	23.01	529.31	95

Appendix 5. Responses of the sample of respondents in graphs.

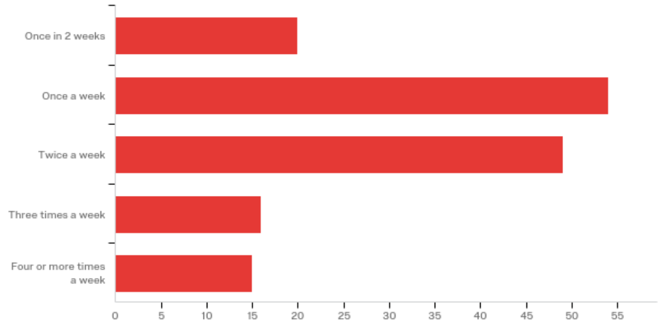
Q1 - Are you the customer of Pingo Doce?



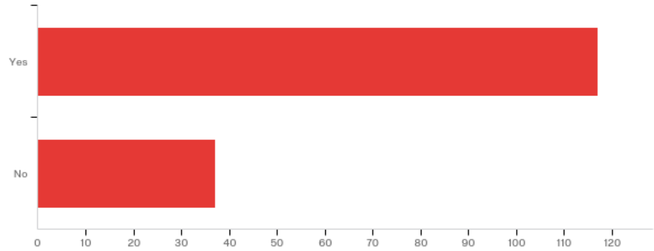
Q2 - Is there Pingo Doce shop in your neighborhood?



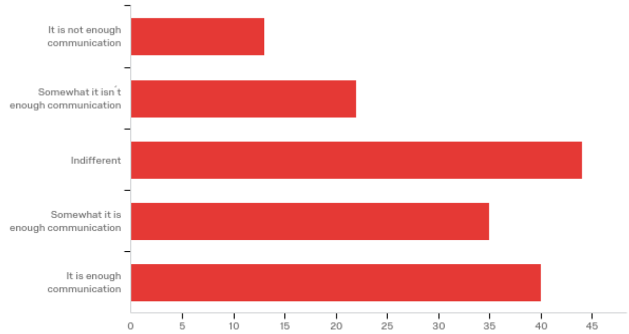
Q3 - How often do you do grocery shopping?



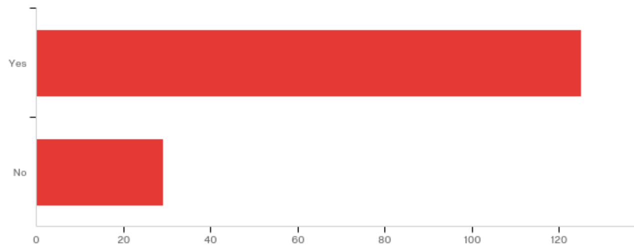
Q5 - Would it be useful for you to be able to receive valuable information from any member of the team in the supermarket?



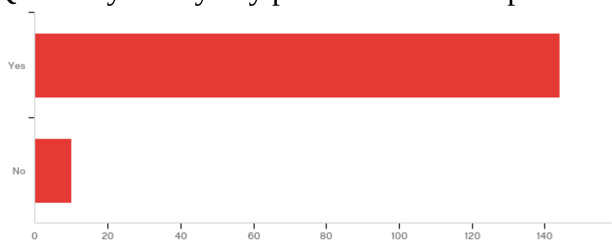
Q6 - Which of the following best describes your view of Pingo Doce’s communication with their customers, on a one-to-one basis?



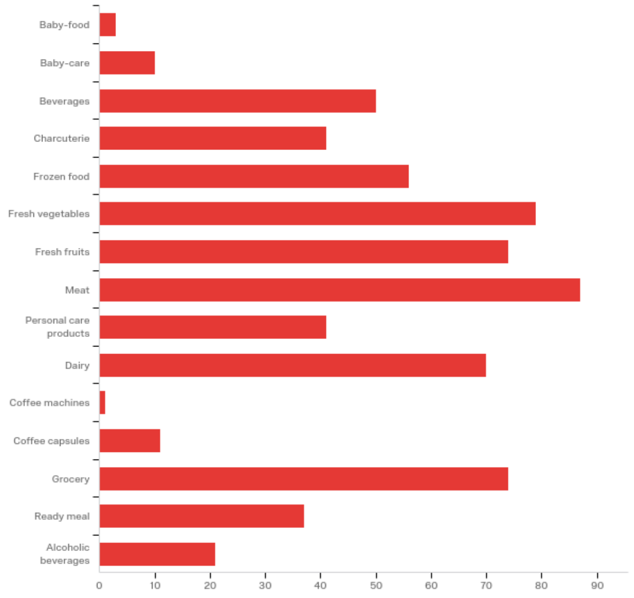
Q7 - Would you like to know about changes Pingo Doce is making to make customers’ lives easier?



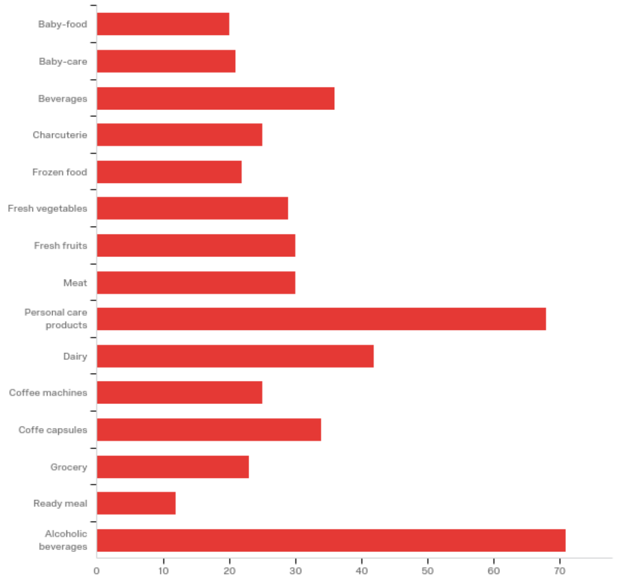
Q8 - Do you buy any products from the private brand of Pingo Doce?



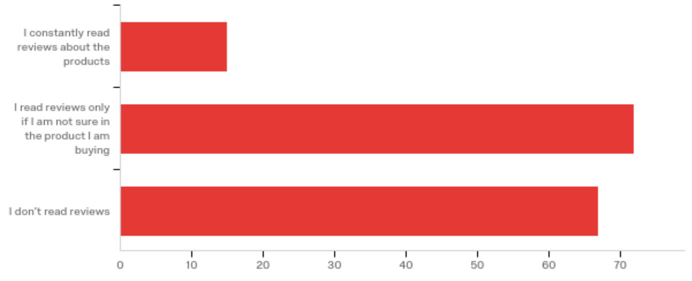
Q9 - In which of the following categories do you by Pingo Doce private brand products?



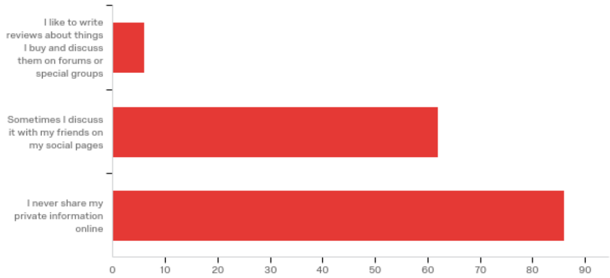
Q10 - In which of the following categories are you loyal to brands that are not Pingo Doce?



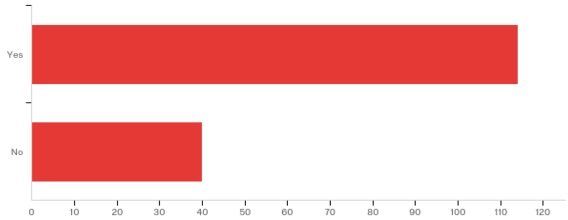
Q11 - Which of the following best describes your desire to read reviews about the product you can find in a grocery shop that you already have bought or just planning to buy?



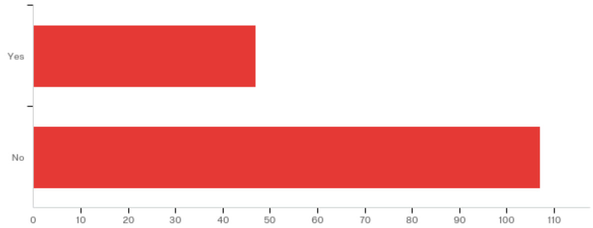
Q12 - Which of the following best describes your desire to discuss in the Internet with other people what you like and what you do not like about the particular product they bought?



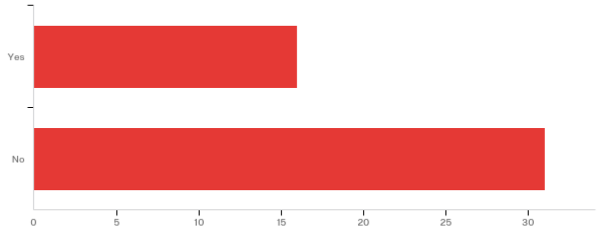
Q13 - Will you be more willing to write reviews and feedbacks if you will know that your voice can bring changes?



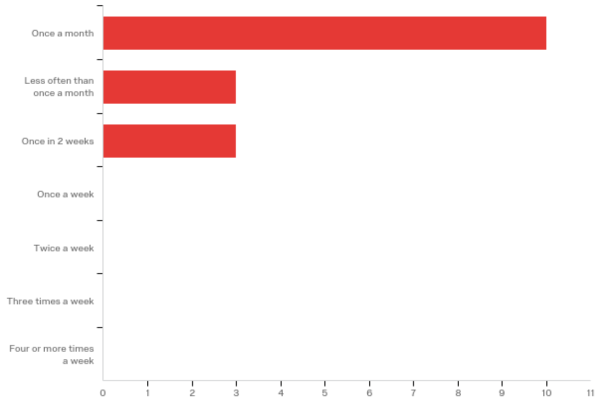
Q15 - Do you shop online?



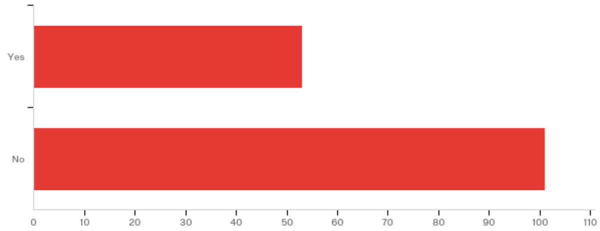
Q17 - Do you do online grocery shopping?



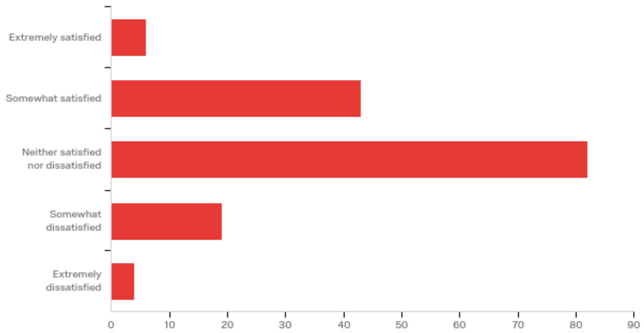
Q18 - How often do you do online grocery shopping?



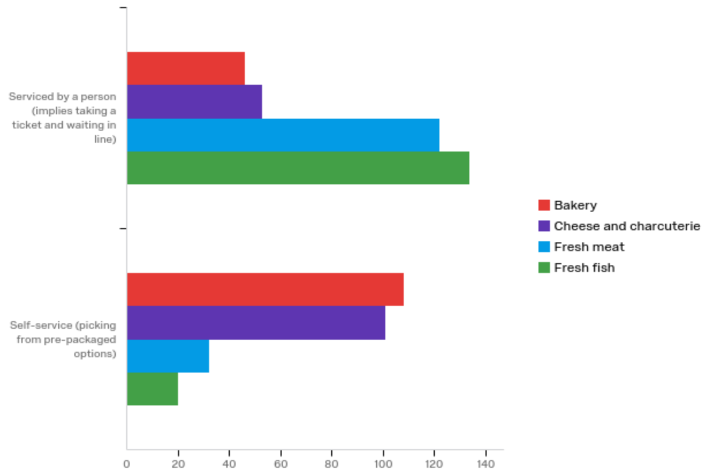
Q20 - If the process of ordering online will be intuitive and delivering will be reliable, will you rather shop online than go to the physical store of Pingo Doce?



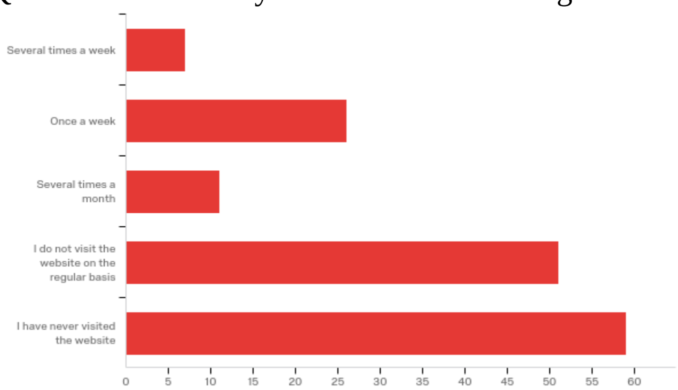
Q21 - To which degree are you satisfied with the “Poupa Mais” Pingo Doce card?



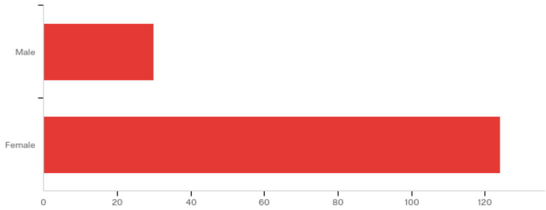
Q22 - Concerning the following areas of the supermarket, please mark the type of service you prefer:



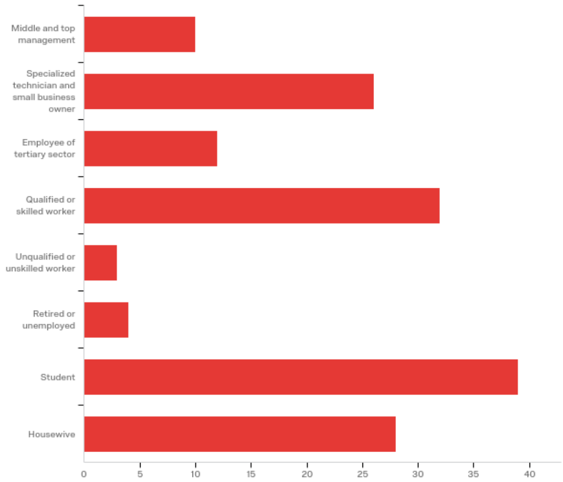
Q23 - How often do you visit website of Pingo Doce?



Q26 - Are you male or female?



Q28 - What is your occupation status?



Appendix 6. Example of low control of the price-lists in store.