

Research report:

Supermarkets 2025

What will the supermarket
of the future look like?



bazaarvoice™



What's inside

Introduction	3
Behavior that sticks	6
Behavior that shifts	9
Rapid grocery	11
Customer is king	16
Values matter	17
Recommendations	20
Demographics	22
References	23
About bazaarvoice	24

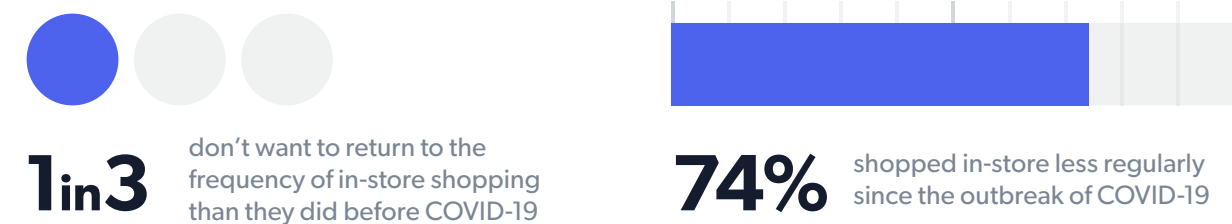
Introduction

The coronavirus pandemic has disrupted consumers' lives all over the world, with those dramatic shifts extending to shopping trends and what consumers want from retailers and brands. As supermarket retailers got to grips with supply chain issues, safety measures, and panic buying, a locked-down public turned to online shopping.

The pandemic not only accelerated the conversion of new online shoppers, but convinced a large majority to continue to purchase online, a shift that is likely to be permanent, transforming consumer behavior well into the future.

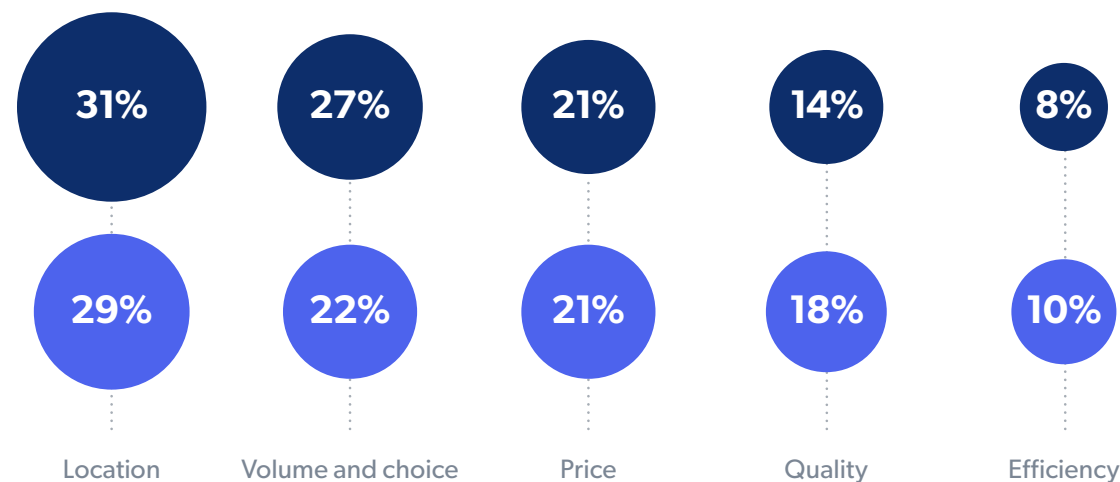
Our global survey found that three quarters (74%) of people have shopped in-store less regularly since the outbreak of COVID-19 – a habit that 32% of US and 37% of EMEA shoppers want to continue after the pandemic.

The impact of the pandemic may have accelerated e-commerce by as much as five years – an acceleration of 60% in the US, and 80% in the rest of the world¹. However, this shift towards digital shopping presents major challenges for grocery retailers as they compete for digital dominance with online giants like Amazon and Instacart, as the brick-and mortar grocery industry, with a few exceptions, has been a laggard in terms of investment in e-commerce capabilities.



Prior to COVID-19, what was the most important factor when selecting a supermarket?

● EMEA ● NA



Loran Gutt, VP of Corporate Development at Bazaarvoice, says:

“Omnichannel delivery was one of most important grocery trends of the last decade. UK supermarket retailers like Tesco, Marks & Spencer, and North American brands like Target and Best Buy that started to use their stores as warehouses to enable online purchase collect in-store services some years ago, were the ones reaping the benefits during the crisis.”

Last year, Amazon owned the largest market share of US food and beverage e-commerce sales at 32.7%, according to the 2019 Grocery E-commerce report². Retailers like Walmart, Target, and Kroger had already started to ramp up their curb side collection capabilities to increase their digital market share. The impact of the pandemic forced them to redouble their efforts. Walmart’s rapid development of curbside pickup, coupled with its massive distribution network, fueled growth in its grocery business, with e-commerce sales growing by 97% in the second quarter of fiscal 2021.

Elsewhere, at the peak of the pandemic, online grocery sales in the UK hit a new peak of 12.4%, according to research from Bain², while in both Germany and Italy they doubled during the crisis, and now account for 2.9% and 4.3% of the total, respectively³.

The UK has been a frontrunner in the supermarket e-commerce journey, with click and collect and home delivery services becoming increasingly sophisticated. Waitrose is currently trialing a two-hour rapid delivery service to select areas, Sainsbury’s has gone down the sustainable route, offering eco-friendly ‘green slots’, with deliveries scheduled to coincide when a Sainsbury’s van is in the same area, while the Co-op, a relative newcomer to online shopping, is trialing robot deliveries in Milton Keynes.



After the COVID-19 pandemic has ended, which of these retail alternatives are you likely to continue?



The sudden increase in online shopping has had a profound impact on supermarket operations, marketing, technology, and profitability.

Figures from Morgan Stanley show that click and collect gross margins are in the 14% to 16% range, compared with in-store margins of 20% to 25%, in large part due to the increased labor costs of picking orders in-store for click and collect or delivering to homes⁴. If this trend continues, the major players in supermarkets will be looking to optimize and automate their operations further.

The growth in e-commerce is forcing changes in the physical stores themselves, which are becoming smaller as more space is dedicated to online fulfillment, restricting the number of products being carried in the in-store range, and an increase in the number of products that can only be acquired through online ordering and online discovery.

With shoppers shopping less in-store, purchasing decisions are made without physical access to product information, so choices are increasingly based on the digital content available for that product, and increasingly this is being generated by shoppers themselves.

Last year, US retailer Target transformed its product detail pages (PDP) to change the way that shoppers connect with brands. By optimizing them through user-generated content (UGC), including customer reviews, questions, and images, shoppers can effectively control the future of PDP, while retail brands play a more influential role in online customer experience. If supermarkets are to mount a serious challenge to the digital dominance of Amazon and Instacart, exceptional customer experience will be key.

Gutt continues: “Having a well-built practice to understand how consumers are changing in as close to real time as possible, and then feeding that information back to management is where pure online retailers really win. In its early days, Amazon excelled at using customer feedback to shape its entire strategy.

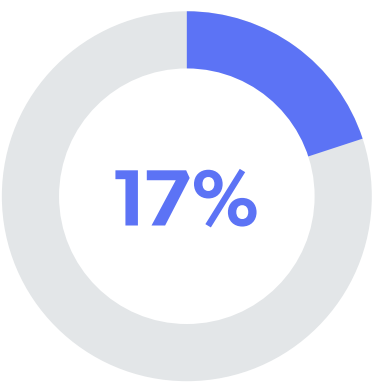
“A lot of grocery retailers are still some way from this, but today they have the means and mechanisms; customer ratings and reviews, social listening platforms, and internal store feedback platforms to really listen to their customers, rapidly absorb that feedback, and enable the business to respond. That is the future for supermarkets.”

Behavior that sticks

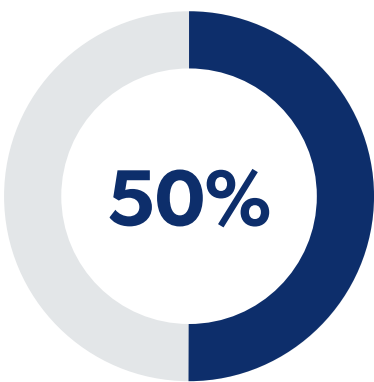
Shopping behaviors changed dramatically during the pandemic. While some cultural norms are likely to reemerge over time, other behaviors - like switching brands, taking out subscription services, and shopping more frequently online - are set to continue after the crisis.

Our survey showed that 39% of respondents purchased from different, often new, brands more than usual during lockdown, with 83% stating they would continue to buy from a newly discovered brand. Meanwhile, 19% of all global respondents had signed up to a subscription service during the pandemic, with 83% willing to continue to pay for their subscriptions. And almost a third (30%) of global respondents now shop online at least once a week, in spite of lockdown restrictions being significantly eased in many places.

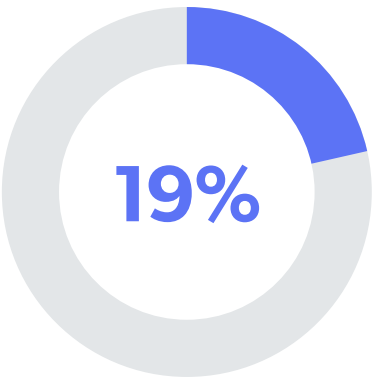
Coronavirus measures: NA vs EMEA



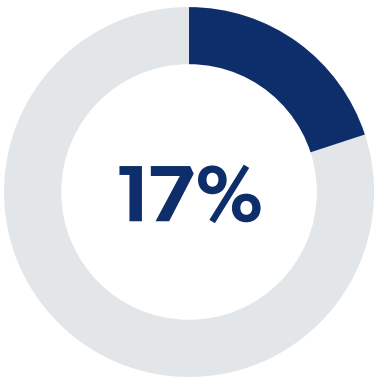
of European respondents shopped at farmers markets more as a result of the pandemic



of North American respondents have simply avoided human-manned checkouts in their usual store



of Europeans have shopped with local small businesses, compared to 15% of North American respondents

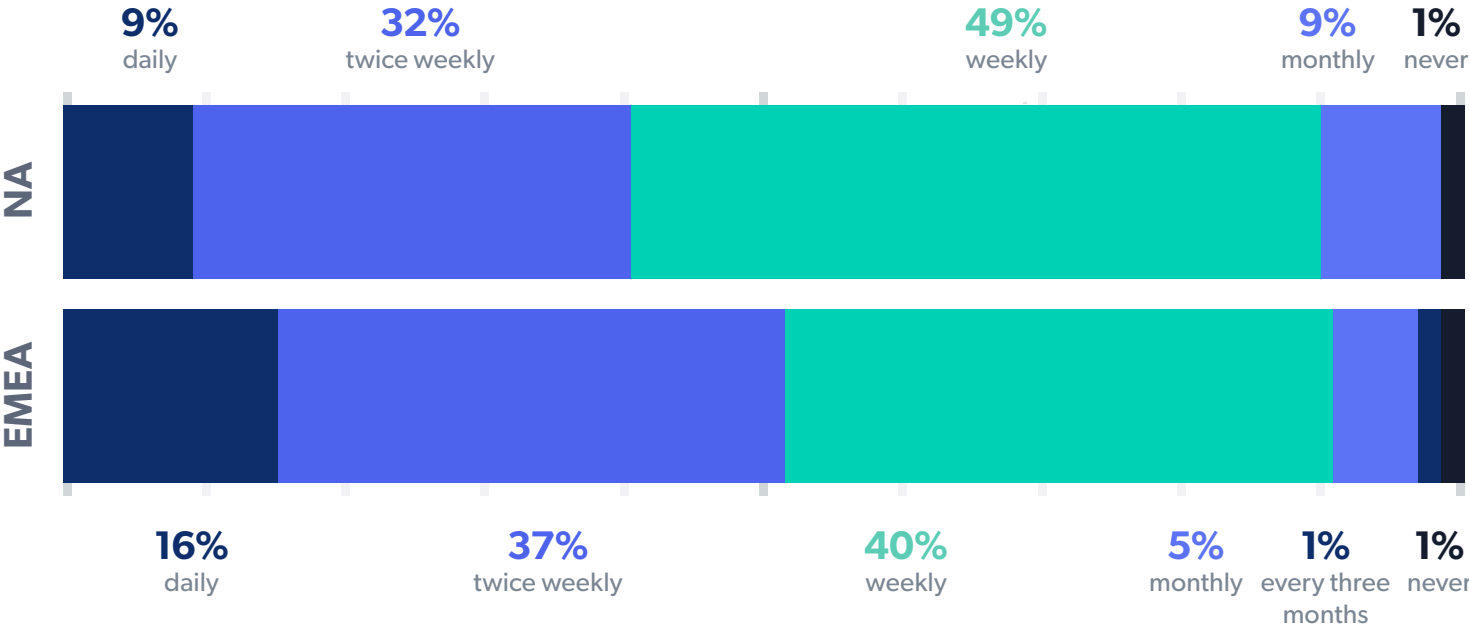


of Europeans have brought groceries directly from brands, rather than using retailers, compared to 10% from North America

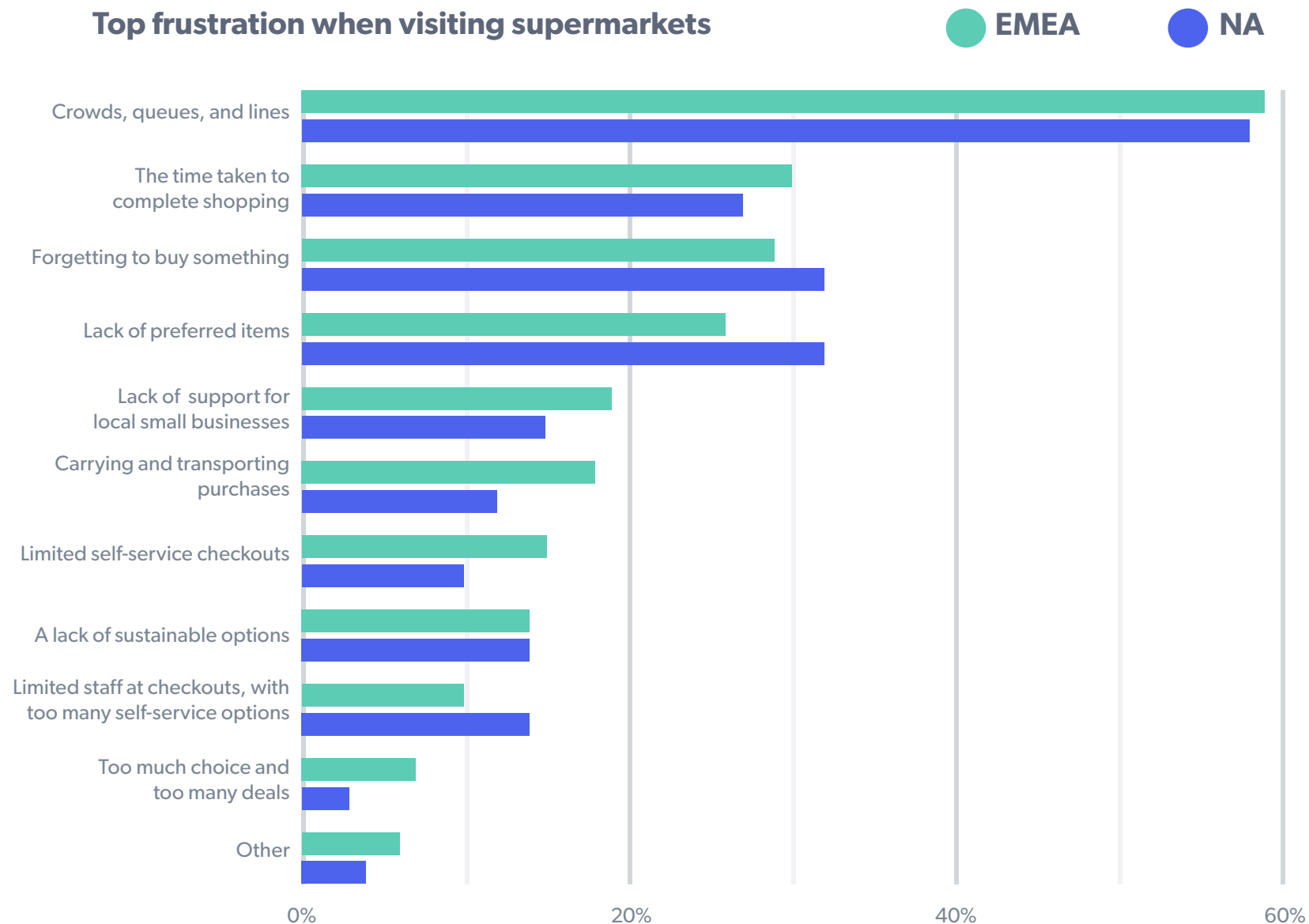
Behavioral differences exist between global shoppers, driven by differences in demographics, culture, lifestyle, and currently, the length and severity of lockdown periods. For example, at the time of the survey, 32% of Brits are uncomfortable shopping in-store, compared with just 21% of Australians who share that sentiment, however, the lockdown experience of the latter was far less stringent than that of the former. More than a quarter (28%) of US respondents signed-up for a subscription service during lockdown compared with just 15% of French respondents.

Frequency of shopping also varies between global regions. 53% of shoppers in Europe are more likely to visit a supermarket twice a week, compared to 41% of shoppers in North America. In Europe, 47% of people shop weekly or less compared with 59% of shoppers in North America.

Frequency of supermarket visits prior to COVID-19



Consumers in some European countries are more open to shopping for groceries outside of traditional supermarkets than others. Among Europeans, 17% bought groceries directly from brands rather than using retailers, compared to 10% of those in North America. On the other hand, North American shoppers made slightly better use of supermarkets, with 50% saying they had avoided human-manned checkouts in their normal store, compared with 44% of those in Europe. Less than half (44%) had ordered their groceries online more often than usual compared to 41% of EMEA. Of the more frequent Europeans shoppers, only 26% said they were frustrated by a lack of their preferred items, compared to 32% of Americans, which may simply come down to proximity to the retailer.



“In many urban areas you can get your stuff faster, and can get all of it,” explains Gutt. “If you live in a very rural area, especially in large land mass countries like Canada and the United States and Australia, what’s available to you can be very different based upon population density and where you live.”

Regional differences aside, supermarkets all over the world now need to deliver a broader range of services. Consumers who altered their shopping behaviors during the crisis are highly likely to continue those behaviors once the pandemic recedes - and supermarkets must be prepared to accommodate a combination of in-store and online practices.

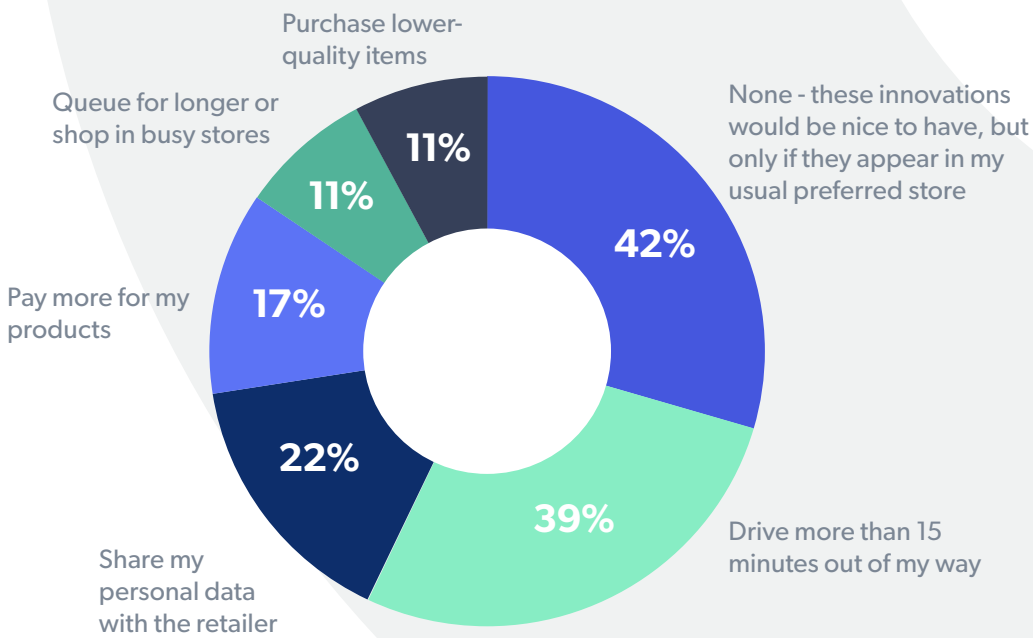
Behavior that shifts

One shopper behavior that is shifting is greater interest for retailers to deliver value-added services through apps and personalized notifications.

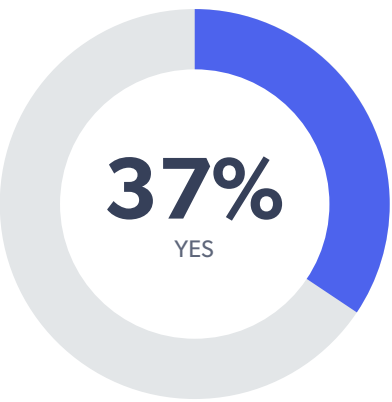
The survey found that across both the US and EMEA more than one-in-five shoppers are in favor of supermarket retailers giving them mobile notifications, for example, to alert them of stock levels for their favorite products, or tell them where their favorite products are located in-store and prompt them when they are in the right aisle. Of those who said that forgetting items was their top supermarket frustration, 28% of European and 34% of North American shoppers would choose a retailer app to help them create and track their grocery list as their preferred solution.



What would you be willing to do to access your ideal retail innovation(s)?



Sharing data is a thorny issue for consumers, even when it is in exchange for a more personalized shopping experience. Asked if in five years' time they would want to provide data in exchange for services, 63% of those surveyed said no – yet when asked what they saw as the most appealing retail innovations in the next six months, 57% chose personalization, with deals, offers, and loyalty programs bespoke to them.



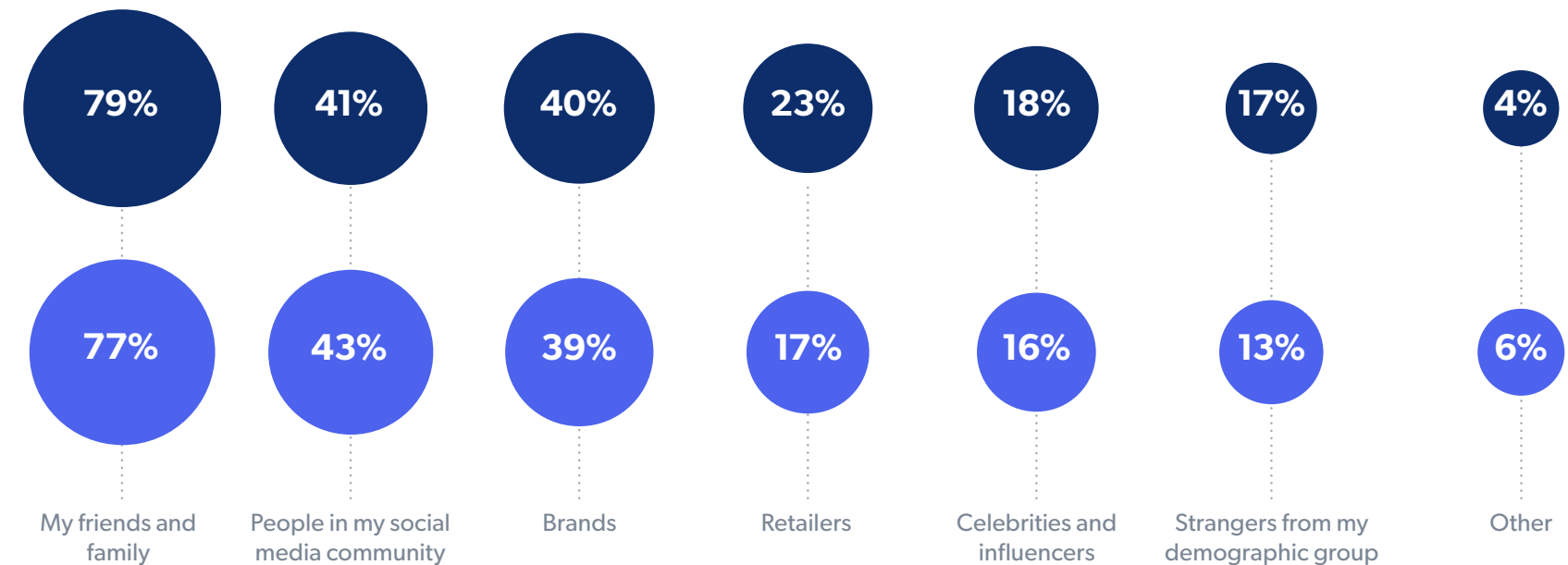
In 3–5 years' time, would you want to provide data in exchange for a more personalized shopping experience?

“This behavior of unwillingness to share data will only shift with a better understanding of what constitutes personalization of real utility,” says Gutt. “When the trade off is worth it, then consumers are willing to exchange data for personalization, and that threshold is different for everybody,” he says. “The more useful your personalization is, the more likely they will trade access to their data for it.”



Whose opinion do you trust the most when considering a new product/purchase?

● EMEA ● NA



“What determines which changes stick or shift comes down to why the changes were adopted in the first place, what the experience of the change was like and how long the changed behaviors were retained,” says Nick Chiarelli, head of trends at digital agency UNLIMITED.

“It can take anywhere from 18 to 254 days for a person to form a new habit, and an average of 66 days for a new behavior to become automatic,” he says. “Many of the changes that people made, thinking they were temporary, are close to becoming entrenched, and it will take more than just the removal of the stress of lockdown to force consumers to forego them.

Rapid grocery

It's no secret that more shoppers are choosing to fill their grocery shopping carts online rather than in-store. However, there is also increasing demand for different delivery and collection options - buy online, collect in-store, or same-day home delivery - without any compromise on product quality. Those retailers that can combine new delivery services with seamless customer experience will have a competitive edge.



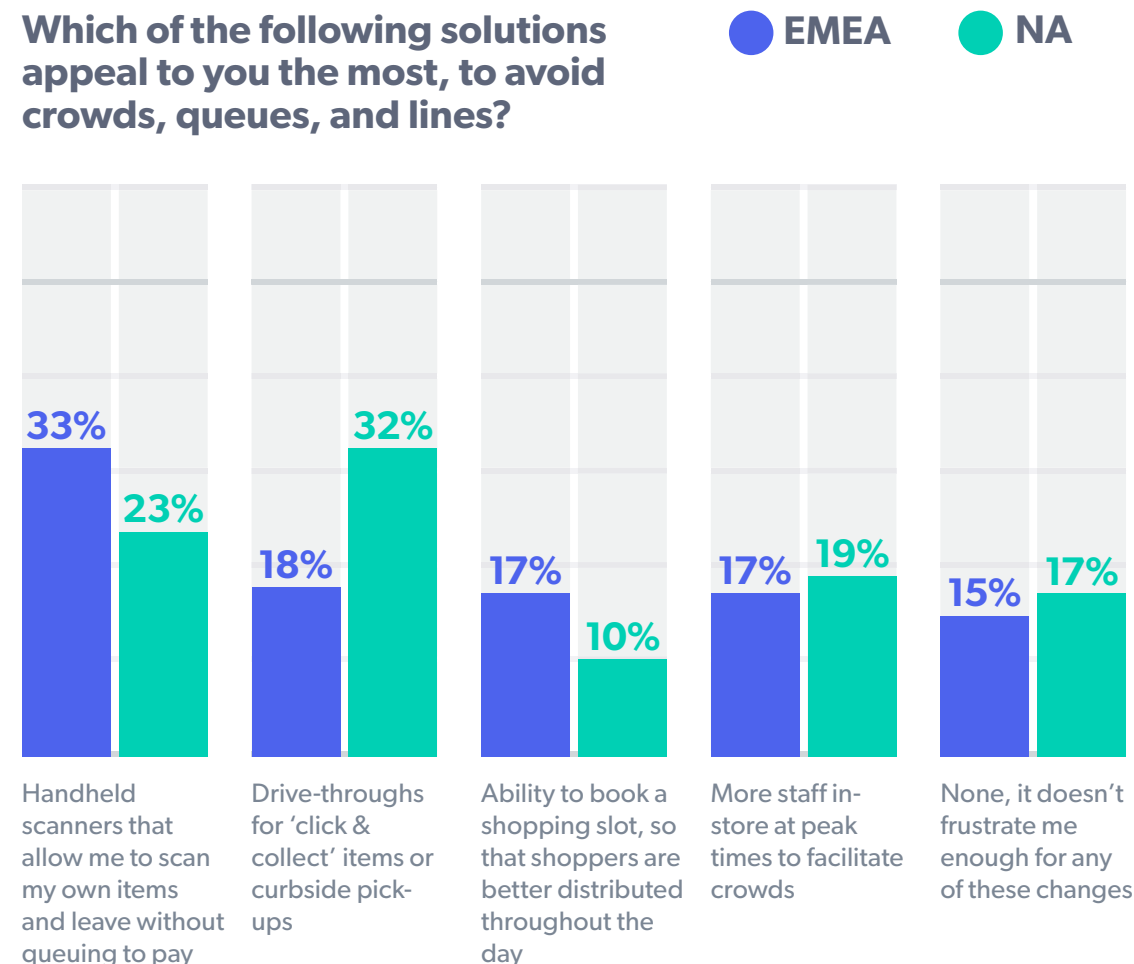
19% favor an automated shopping service delivering their usual products to home

Improved integration between online and offline shopping has given rise to hybrid fulfillment models, incorporating 'buy online, pick up in-store,' curbside delivery, and rapid 'last mile' delivery to the home. The growth of these hybrid models is largely dependent on population density; according to our global survey, the hybrid model is more popular with shoppers in North America, with 32% choosing 'buy online, pick up in-store' or curbside pickups to avoid crowds and lines, compared with 18% of those in European countries.

Early adopters have already evolved their delivery service offerings. Walmart's new Express Delivery service can get purchases to a customers' home in less than two hours, while the company's new membership service, Walmart+, gives members unlimited same-day delivery from over half of its 4,700 stores. In the UK, Waitrose has rolled out a two-hour rapid delivery service within select London postcodes, and Sainsbury's one-hour Chop Chop bicycle delivery service is being rolled out to major cities across the UK.



Which of the following solutions appeal to you the most, to avoid crowds, queues, and lines?



Getting closer to the customer

Meeting demand for fast, flexible delivery requires more fulfillment and delivery options supported by scalable automation solutions, located as close to the customer as possible. These range from centralized customer fulfillment centers (CFC), to micro fulfillment centers (MFC).

In the UK, for example, with its smaller landmass and denser population, the centralized CFC model, equipped with automated picking technology, has proved effective. Tesco's newest Dotcom CFC incorporates goods-to-person automation technology that boosts labor productivity and profitability on same-day delivery service. Online grocer Ocado deploys robots within a 4D 'hive' network system at its CFCs to process 65,000 orders per week.

MFCs are areas attached to supermarkets, often derived from converted shop floor space, that deal specifically with online order fulfillment.

They combine the automation used in centralized CFCs with the location advantages of being close to the customer. Some retailers are also testing 'dark stores,' locations that outwardly look like supermarkets, but are closed to customers, their sole purpose being to prepare pickup and delivery orders.

The MFC model is gaining a strong foothold in the market, especially in the US, with its larger land mass and lower population density. In Australia, supermarket brand Woolworths is trialing the feasibility of MFCs in three locations with the aim of improving speed of delivery and customer experience. Interact Analysis⁵ estimates that by 2023 MFCs will account for around 20% of the total demand for US grocery warehouse automation.

A third fulfillment option for grocery retailers, particularly smaller and mid-market companies unable to scale in-house delivery fulfillment, is via third party delivery service providers such as Instacart and Shipt. 41% of European and 35% of North American respondents chose third-party partnerships as their preferred solution to avoid carrying or transporting their purchases, and supermarkets are listening up. In the UK, the Co-op has partnered with Deliveroo to provide a 30-minute grocery delivery from 400 stores, making it the most widely available supermarket on the app. Meanwhile, Morrisons expanded its partnership with Amazon to provide same-day grocery delivery to Prime members.

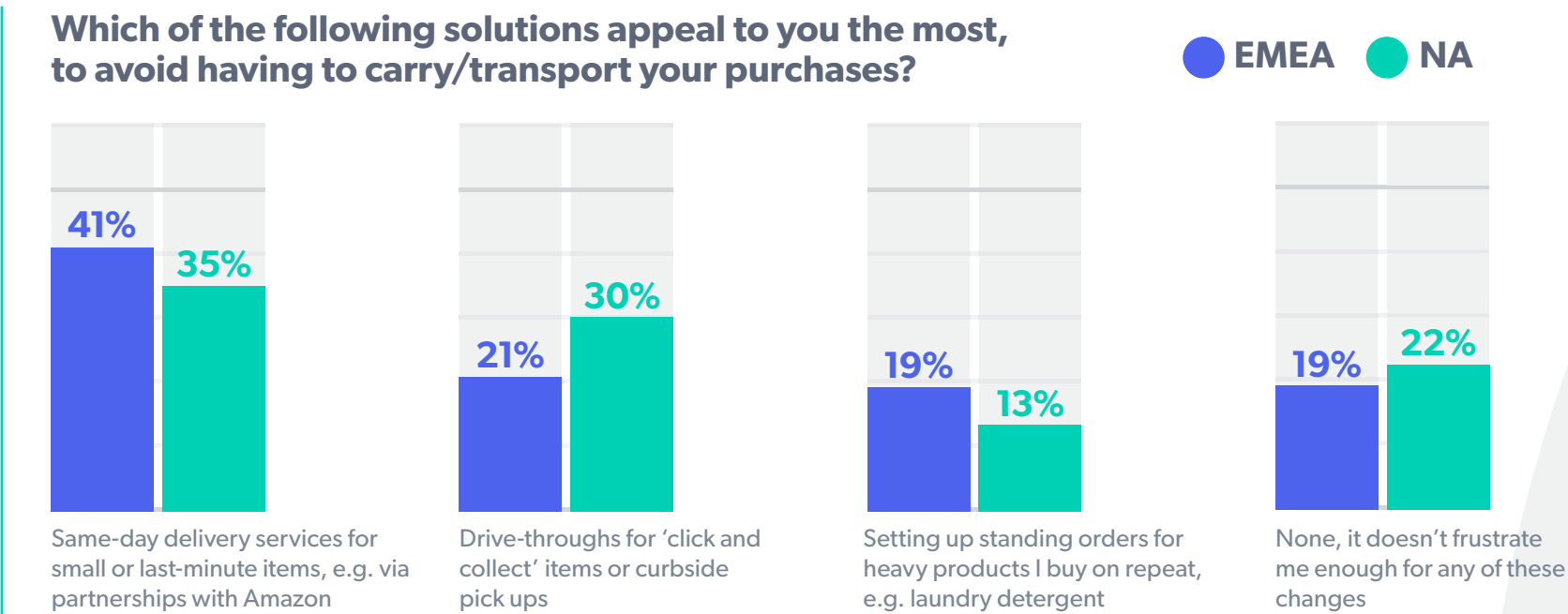
Automated picking

A crucial element in the online customer experience is the picking of their purchases, but the knock on effect of this has been an increase in manual pickers and hired shoppers in-store. Kroger and Aldi, for example, outsource their in-store picking to companies like Instacart. According to research by micro-fulfillment tech firm Fabric, these additional pickers clogged up the aisles, caused longer queues, and heightened the stress of shopping for the majority of shoppers they surveyed.

Picking processes are being greatly enhanced by automation and robotics technology. Walmart’s new robotic system Alphabot uses autonomous carts to retrieve and deliver ambient, refrigerated, and frozen online grocery items to a workstation, where a Walmart associate checks, bags and delivers the final order.

“For customers still getting used to the idea of someone else picking their grocery shopping items, robotic picking will give them peace of mind, says James Smith, UK managing director of AutoStore.”

“One of the main things robotic technology does is eradicate the unavoidable issue of human error, which has a huge impact on the productivity and efficiency of supply chains. Customers are more concerned with getting their orders and products on time and without error, and for that reason will likely be unaffected by the fact that the ‘picking’ will be done by robots and not humans.”



Streamlining the in-store shopping experience

Technology also holds the key to the in-store customer experience. Influenster’s global survey found that a third of shoppers believed the way to improve their biggest supermarket frustration, self-checkouts, was simply to deploy more robust technology to avoid issues with the machines.



In-store shoppers, however, appear to still appreciate the human touch. Walmart has redesigned its in-store checkout system to offer self-checkouts, and pickup and delivery, with the cashier transitioned to a new role of host, whose job it is to ensure that checkout experiences meet the specific preferences of the customer, whether self-checkout, or traditional staff checkout.

Automating last-mile delivery

The Co-op is trialing same-day autonomous robot deliveries to communities across Milton Keynes and surrounding areas, with the number of customers using robot deliveries more than doubling since the start of lockdown. Walmart is partnering with drone firm Zipline for a new drone delivery operation in the US. Although primarily for on-demand deliveries in health and wellness, the pilot program signals the latest of Walmart’s moves toward wider drone use.

“The main barriers to this level of delivery automation are costs and legislation, although as costs come down and legislation opens up this will happen more regularly in certain parts of the world,” says Paul Morris, head of e-commerce at Havas Media Group.

“Other challenges to the expansion of last mile delivery include low margin products versus cost of delivery, and certain types of goods; glassware, antiques, and perishable goods, and where and the infrastructure itself is full of friction. It is relatively easy in the UK, but less so in the expansive network of Australia.”

What’s the longest delivery timeframe customers are satisfied with?

- EMEA

food and beverage
- NA

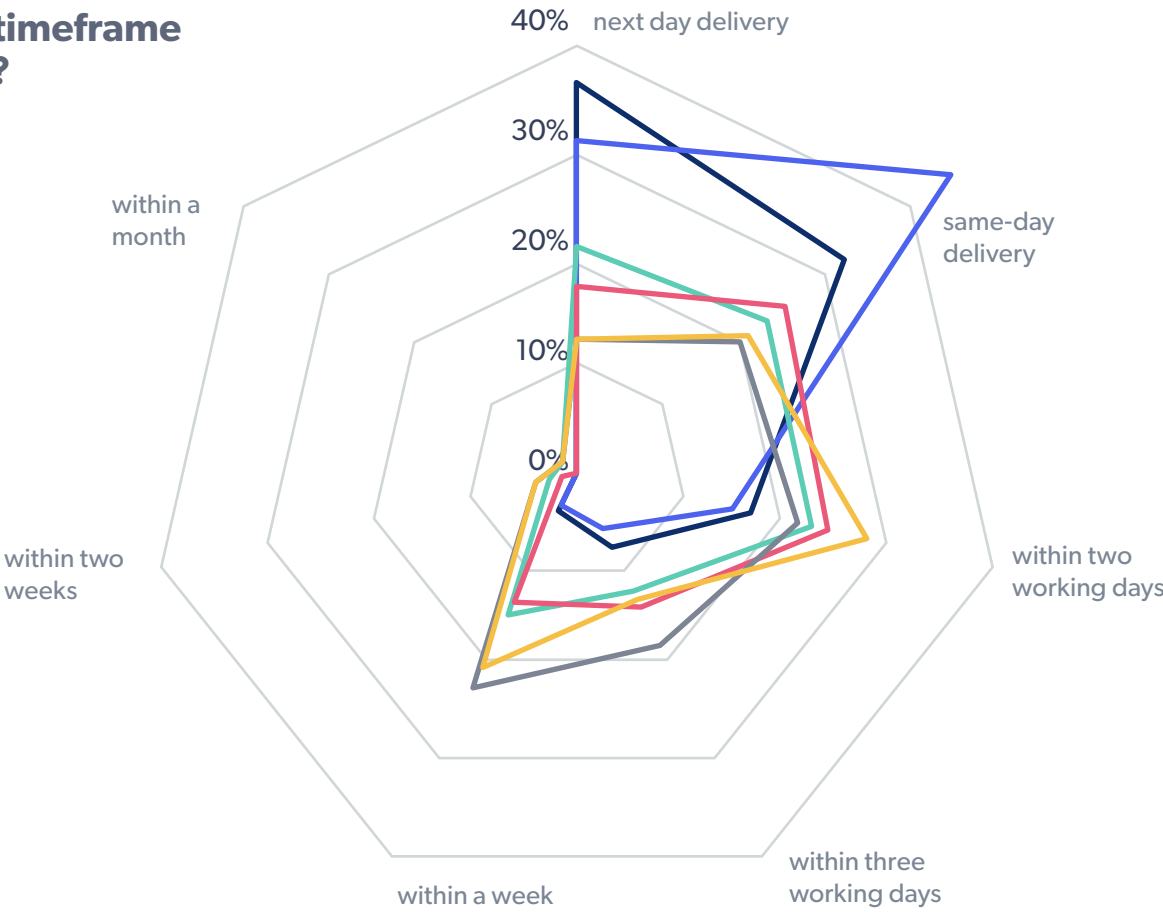
food and beverage
- EMEA

DIY & consumer electronics
- NA

DIY & consumer electronics
- EMEA

Health & beauty
- NA

health & beauty



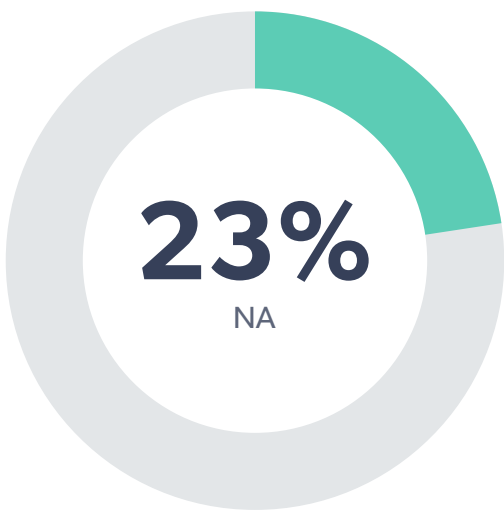
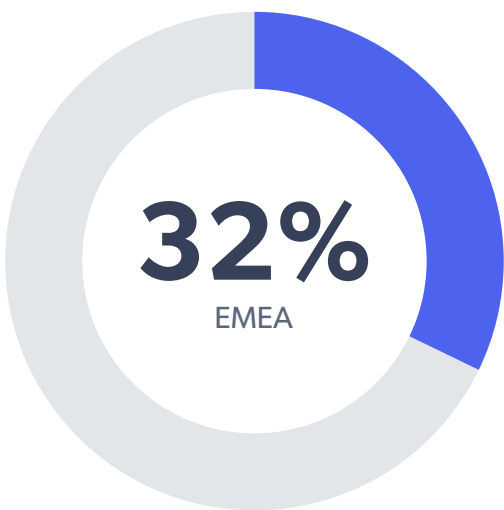
**Brand availability:
Online vs in-store**

With rapid growth in online shopping, supermarkets are dedicating more of their space and staffing resources to it, with in-store shelf-space giving way to the provision of more space for micro-fulfillment picking, and in-store, for more self-checkouts and scanning systems.

This clearly has an impact on the in-store shopper, and their preference of where to shop. Influenster’s global survey found that 32% of European shoppers and 23% of North American shoppers favored larger supermarkets that had space for surplus stock to overcome the frustration of missing items.

The implications of reduced shelf space for brands are even more significant, and now more than ever they need to be building strong relationships with grocery retailers, offering the value add that will make them stand out as they compete for reduced shelf space.

To combat the problem of missing items...



were in favor of larger supermarkets that have more space for surplus stock

One strategy that could prove valuable is the use of customer reviews. Australian liquor and wine brand Dan Murphys piloted a ‘four-star store’, in which product offering was curated through customer ratings of four stars or more. Customer feedback on being sold the things they had told the company they loved via its digital platform was very positive.

However, unless a brand maximizes its appeal to customers shopping without stores, they risk being removed from the range as stores downsize.

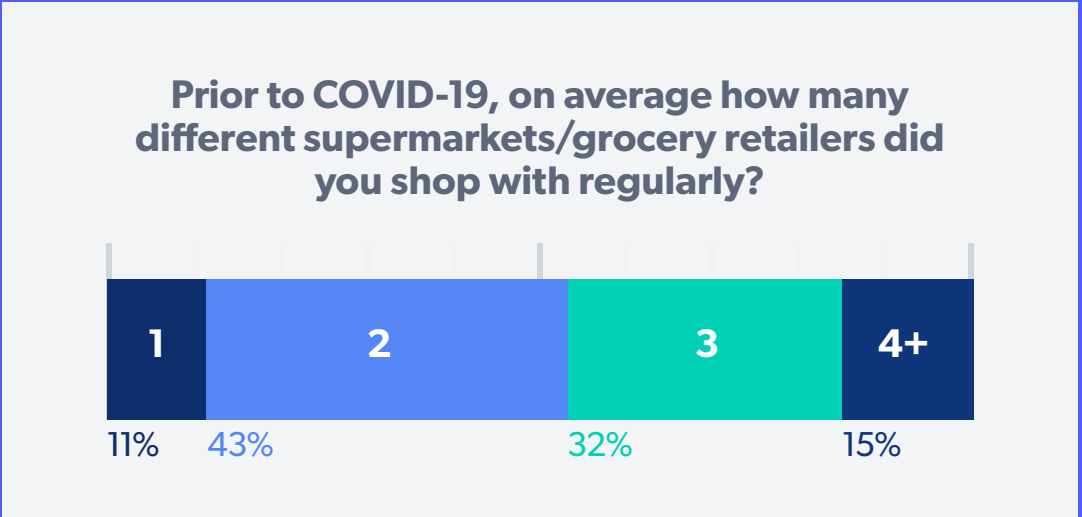
“Stores will favor their private labels and the highest performers during that downsizing,” says Loran Gutt. “Even if in the future stores upsize again, and grocery retailers return to normal levels of profitability by that stage the brand will have gone through the consumer squeeze as well as retailer squeeze. The best defense is to be ready for the future of ‘shopping without stores’ is to have the content. Work with your retailers. Really understand what those retailers are asking you for, the timeline on which they’re asking you for it, and then work with trusted partners to meet those timelines.”

Customer is king

The future of online grocery shopping will be determined by customer experience, with technology being the key decider in terms of which company will win. Now more than ever retailers need to understand customer sentiment, the emotion that customers feel towards their brand, and to do that they need mechanisms with which they can listen to their customers, gauge that sentiment and feed it back to management.

Things are changing and the market leaders are investing in the technology they need to provide a winning level of customer experience. While Amazon still leads in online grocery customer satisfaction, according to the 2020 U.S. Online & In-Store Grocery Shopping Study⁶, on a scale of 1 to 5, scoring 4.47, it was only just ahead of Walmart at 4.38.

The Bazaarvoice Shopping Experience Index from May 2020 found that 78% of shoppers globally trust online product reviews, while our research showed that shoppers want reassurance from friends, family and social media community when trying a new product. UGC influences consumer purchasing decisions and drives sales, and crucially, enables the company to track and respond quickly to shopper sentiment.



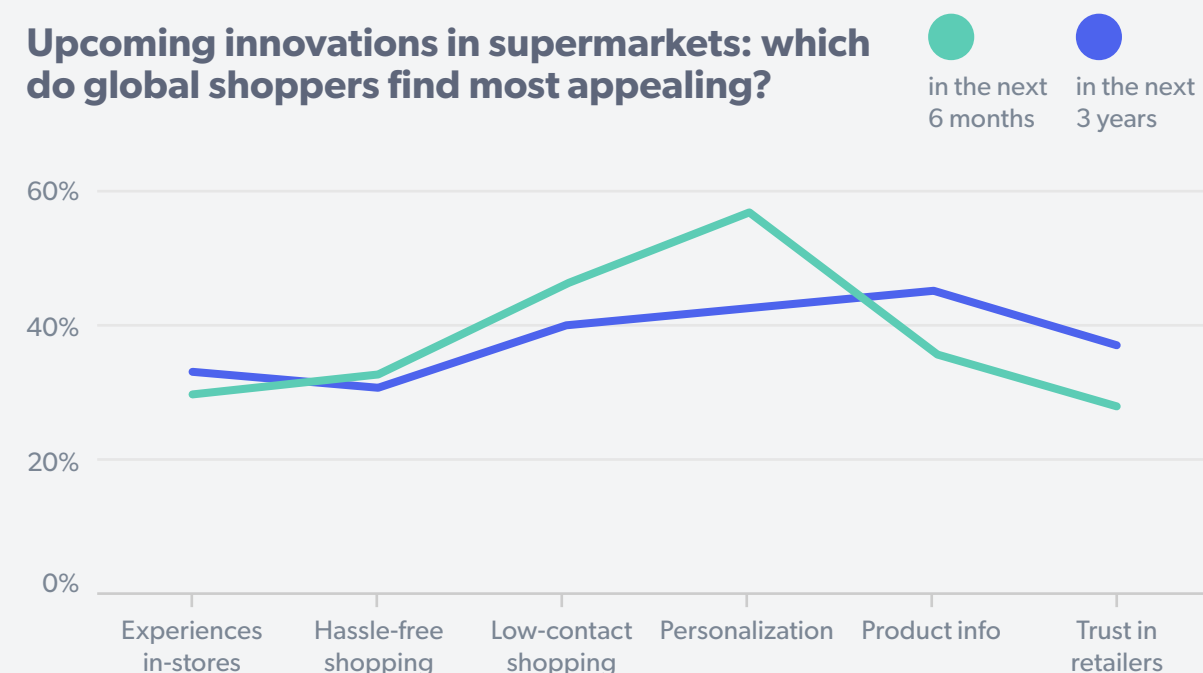
Shoppers are easily frustrated and as many as two in five may never return to a retailer after a bad experience. Without an effective mechanism for listening to them, for example, via an internal store feedback platform with options for direct feedback via phone instant message or live chat, or the company’s social media platforms, customers are likely to vent their frustrations through their own social networks. Retailers need to establish a vigorous social media strategy that listens and responds to its customers to resolve issues, and also creates incentives for customers to provide feedback.

Growth in e-commerce brings new challenges for grocery retail, and the digital customer experience will be pivotal to driving growth beyond the pandemic.

Values matter

To be successful in the digital shopping arena, retailers and brands alike must find innovative ways to win the trust, as well as the spend, of shoppers. Trust between retailer and customer will become increasingly important as the pandemic recedes and immediate concerns around contactless shopping are eased. According to Influenster's global shopper survey, 28% deemed "trust in retailers" an appealing innovation for the next six months - but this rose to 37% when thinking about three years in the future.

Upcoming innovations in supermarkets: which do global shoppers find most appealing?



Trust is important when retailers are expanding their e-commerce sites. The 'Trusted 100 – The Sites to Shop 2020' report, published by omnichannel retail management system firm Brightpearl, revealed that 42% of shoppers say unreliable delivery had jeopardized their trust in online brands since the coronavirus crisis⁷. As a result, more than half of shoppers say that trust is their primary motivator when choosing which retailer to shop with online.

It is a complex dynamic between retailers and the brands they stock in-store. Fixture shelves are filled with multiple competing brands and product sizes, which means that sales can end up spread over many SKUs. In these circumstances, either promotional price will drive trial and adoption, or brand loyalty will prevail and establish clear leaders within the category. But shelves are not ever-expandable; product categories are overloaded with multiple brands and product sizes, and retailers want to simplify and reduce duplication on physical in-store shelves. This will create space for a wider variety of products that will ultimately drive incremental sales and increase customer basket size.

Shoppers also want more information about the products and brands being presented to them, and will increasingly make choices based on what digital content is available. Customer reviews and questions, product images and descriptions increase interest in the brand values, which could range from attributes, such as provenance and quality to recyclability, sustainable manufacturing and ethical sourcing. Brands will have to provide this for retailers who are thinking carefully about how to build customer trust with less floor space, less frequent store visits, and fewer in-store shoppers.

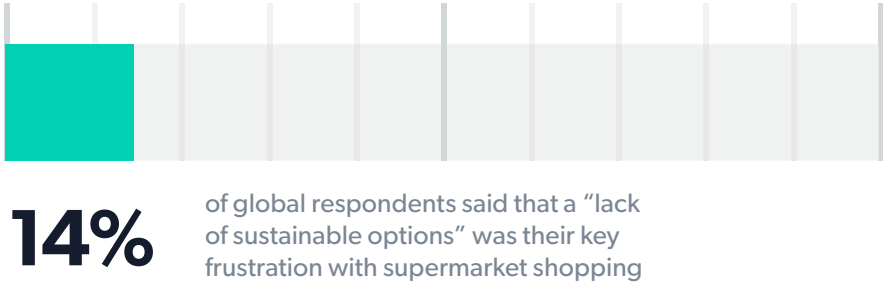
This presents both opportunities and challenges for new brands looking to compete with the tried and trusted regular additions to the online shopping trolley. The most successful challenger brands created in the last decade have achieved that success through superior digital content.

Loran Gutt says, “Great online to offline tools for the businesses are key, and that’s true whether you’re an online mattress company or an online food company. If you are a new grocery brand, just getting started, the first move is to have excellent digital content and excellent online to offline strategies.”

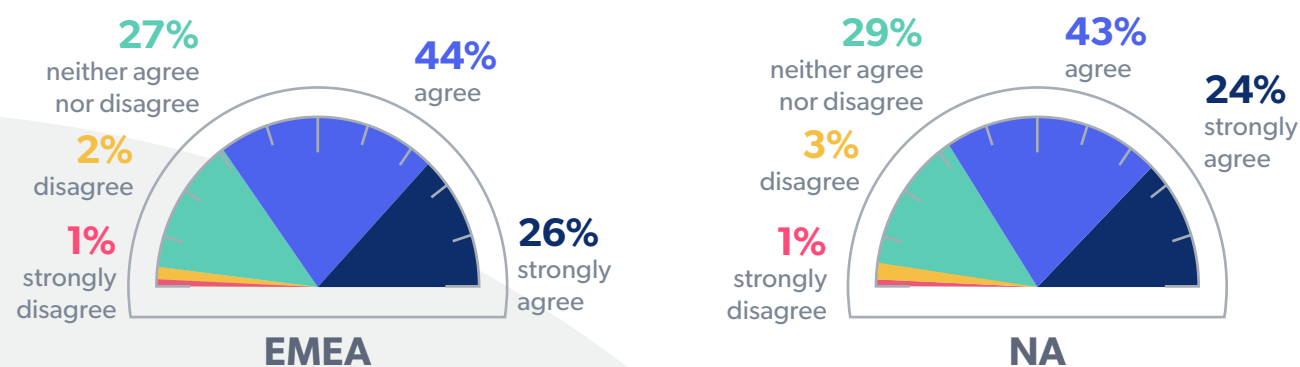
The shift to online shopping will almost certainly affect product choices. What shoppers would choose in the physical store is highly likely to differ when shopping on a screen, when they might be looking for new innovations, more variety, or additional information about new products. Brand trust will become even more important if brands are to attract new customers in the age of online shopping.

“That is obviously a massive influence in terms of what people buy,” agrees Gutt. “It is also why grocery retailers are now pushing brands for more detail and more fidelity around things like product descriptions so that they can personalize that content, for example, for those who are vegan, dairy free, or grain free, etc. And if the brand has not worked to maximize its desirability to the shoppers who are shopping without stores, they run the risk of being removed from the range.”

In recent years, sustainability has become part and parcel of authenticity. To maximize trust, grocery brands and retailers alike must ensure their sustainable and socially conscious credentials are at the forefront of communications. Influenster’s global shopper survey found that 14% of respondents cited a lack of sustainable options as their key frustration with supermarket shopping, while a quarter envisaged that in the next three to five years they would only shop in supermarkets that had a clear and positive track record of their sustainability and social responsibility.



“I will only shop in supermarkets with a clear and positive track record of their sustainability and social responsibility.”



Retailers themselves can improve their standing with their customers with a few “quick wins” in the sustainability arena. Around 1 in 3 shoppers globally would be in favor of retailer incentives that would reduce single-use plastics, while 35% of European shoppers would like to see more self-serve options so that they can use their own refillable containers.

Most appealing sustainability solutions for supermarkets

● EMEA ● NA



Another big factor in brand trust is brand heritage, and here lies a major battleground to be contested by new brands and those that shoppers have been buying for years.

“Why do you trust a Unilever product or a Procter and Gamble product?” says Gutt. “It’s because they’ve been around for 150 years and because your family has been using them for years. This becomes extremely valuable when, in the absence of other product information, consumers find themselves in decision paralysis.”

Understanding consumers and consistently meeting their expectations is the key to winning brand trust, but it goes beyond simply understanding shopper behavior. In an increasingly digital grocery retail landscape, it can be earned by retailers and brands that deliver an exceptional online customer experience.



Recommendations

The accelerated trend towards online grocery shopping is here to stay. This behavioral shift will affect everything from store layout and floor space, to delivery services and grocery supply chains. How can brands and retailers adapt for success in the era of online?

Use content to stand out to shoppers.

Shoppers want more information about the products and brands being presented to them, and are making choices online based on the digital content available. The most trusted content is generated by shoppers themselves; bolster product description pages using user-generated content to build connections with shoppers. UGC is a great way of driving traffic to certain products, helping shoppers discover new products, and ultimately increasing conversion rates and basket sizes.

Get techy with fulfillment services.

Retailers - and brands, if they are pushing direct-to-customer sales - must meet the rising demand for fast, flexible delivery in order to increase their share of the online shopping market. Innovative and hybrid fulfillment and delivery options can be supported by a variety of new technology: scalable automation solutions, robotic pickers, and drone deliveries are being used to improve the productivity and efficiency of supermarket supply chains.

Build a robust feedback loop.

To create an exceptional customer experience, it's essential for supermarkets to have a well-built practice to understand consumer sentiment in near-real time. Customer ratings and reviews, social listening platforms, and internal store feedback platforms are a must for retailers to listen to their customers, absorb their feedback, and act on it. Aim to establish a vigorous social media strategy that listens and responds to its customers to resolve issues, and also creates incentives for customers to provide feedback.

Communicate with customers in new personalized ways.

Retailer apps and personalized notifications are on the rise, and shoppers are in favor of this level of support. They are willing to exchange personal data for services, recommendations and deals bespoke to their needs. It's a trade-off, the more useful the personalization is, and the more seamlessly retailers and brands can deliver it, the more likely it is that a customer will trade access to their data.

Understand the brand-retailer dynamic, both on and offline.

Brands need to be building strong relationships with grocery retailers, offering additional value as they compete for reduced shelf space in-store and more scattered attention during the online shopping journey. Brands must collaborate with retailers and work to understand the pressures on them; it is crucial that they provide useful, detailed and well-labelled data and information that the retailer can use efficiently. Successful product launches and strong, organized UGC are more important than ever as brands try to endear themselves to retailers under pressure.





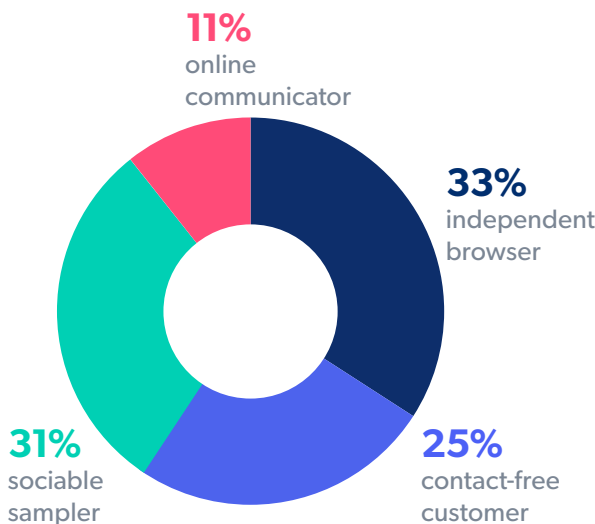
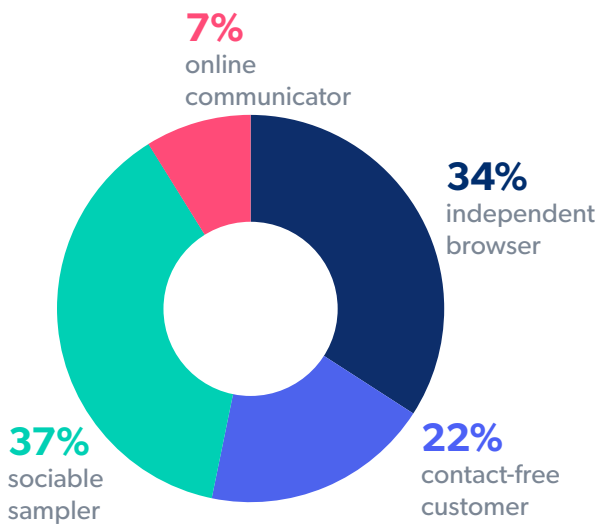
Demographics

This report is based on the findings of a Bazaarvoice sentiment survey, conducted with the global Influenster community between August 13, 2020 and September 4, 2020. We surveyed Influenster users across North America and Europe; for the purposes of this report, 'EMEA' refers to aggregated data from the UK, France and Germany. The total breakdown of respondents by location is below.

370	11,708	982	307
France	North America	UK	Germany

Please note that figures in this report may not add up to 100 percent due to rounding or multi-answer questions.

To understand more about our respondents, we asked respondents to self-identify their shopper personality style based on two metrics. Firstly, whether they preferred a contact-free shopping experience with minimal social interaction, or an engaging shopping experience that includes social interaction with staff or other customers. Secondly, whether they preferred to shop online or in-store.



References

1. **Neustar, Preparing for the future of retail in a COVID-19 economy.**
<https://www.home.neustar/resources/product-literature/future-of-retail-in-covid-19-economy>
2. **eMarketer, Grocery Ecommerce 2019**
<https://www.emarketer.com/content/grocery-ecommerce-2019>
3. **Bain, How to ramp up online grocery, without breaking the bank.**
<https://www.bain.com/insights/how-to-ramp-up-online-grocery-without-breaking-the-bank>
4. **Morgan Stanley, COVID-19 Boosts Ecommerce, Resizing US Retail**
<https://www.morganstanley.com/ideas/coronavirus-ecommerce-retail-shopping>
5. **Interactanalysis, Micro-fulfilment re-inventing online grocery distribution.**
<https://www.interactanalysis.com/micro-fulfilment-re-inventing-online-grocery-distribution>
6. **PR Web, Surge in dual channel grocery shopping.**
https://www.prweb.com/releases/retail_feedback_group_study_finds_surge_in_dual_channel_grocery_shopping_supermarkets_show_strongest_online_grocery_shopper_growth_during_pandemic/prweb17220162.htm
7. **Brightpearl, Trusted 100: The Sites to Shop 2020**
<https://www.brightpearl.com/brightpearl-trusted-100>

About us

Each month in the Bazaarvoice Network, more than a billion consumers create, view, and share authentic user-generated content including reviews, questions and answers, and social photos across more than 6,200 global brand and retailer websites. From search and discovery to purchase and advocacy, Bazaarvoice’s solutions help brands and retailers reach in-market shoppers, personalize their experiences, and give them the confidence to buy.

Founded in 2005, Bazaarvoice is headquartered in Austin, Texas, with offices in North America, Europe, Asia, and Australia.

BAZAARVOICE.COM

bazaarvoice®