

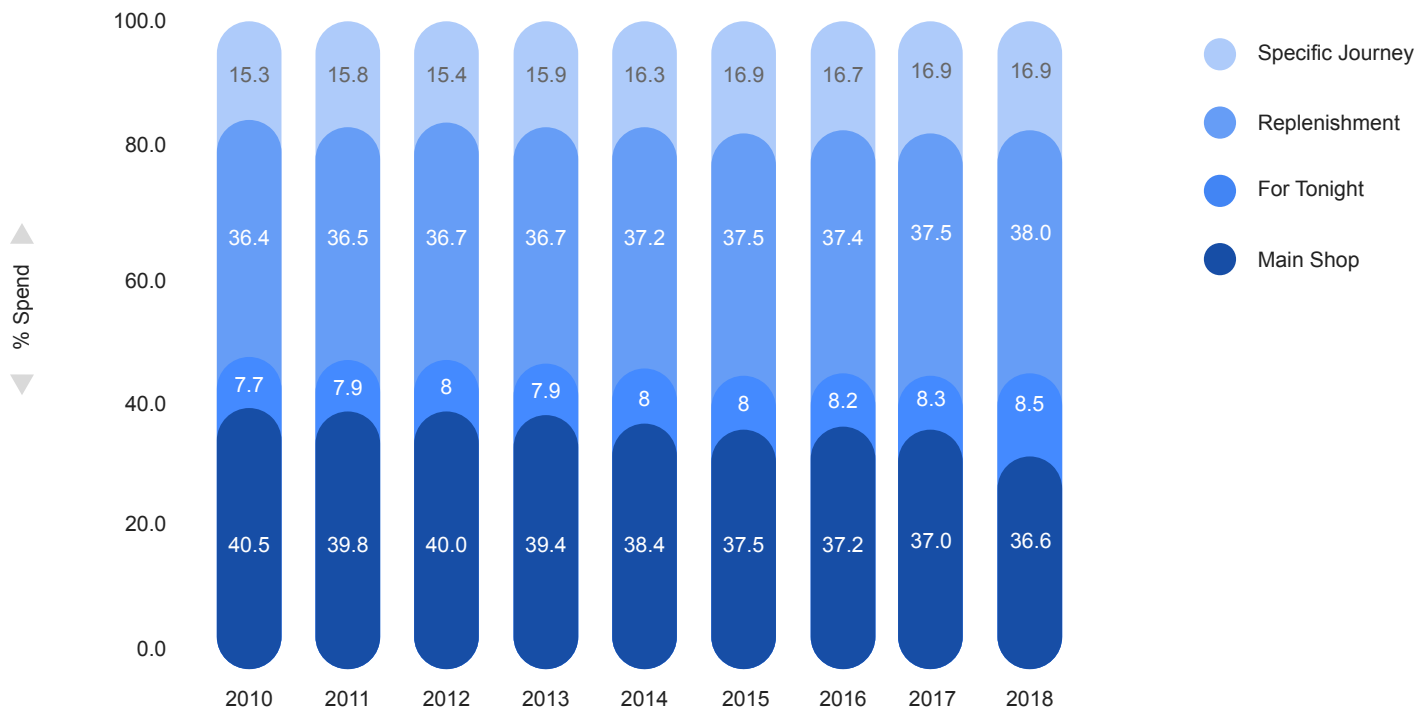
Think with Google

U.K. strategic insights: **How digitisation is changing the behaviour of local grocery shoppers**



Small baskets, **big changes**

The main shop (trolley) has been squeezed this decade



Consumers have low loyalty to particular brands on convenience missions

Grocer loyalty
is **weakest in
convenience
missions**

Kantar FMCG Panel 52 w/e 19 May 19



Strength of loyalty in convenience

0.1%

16%

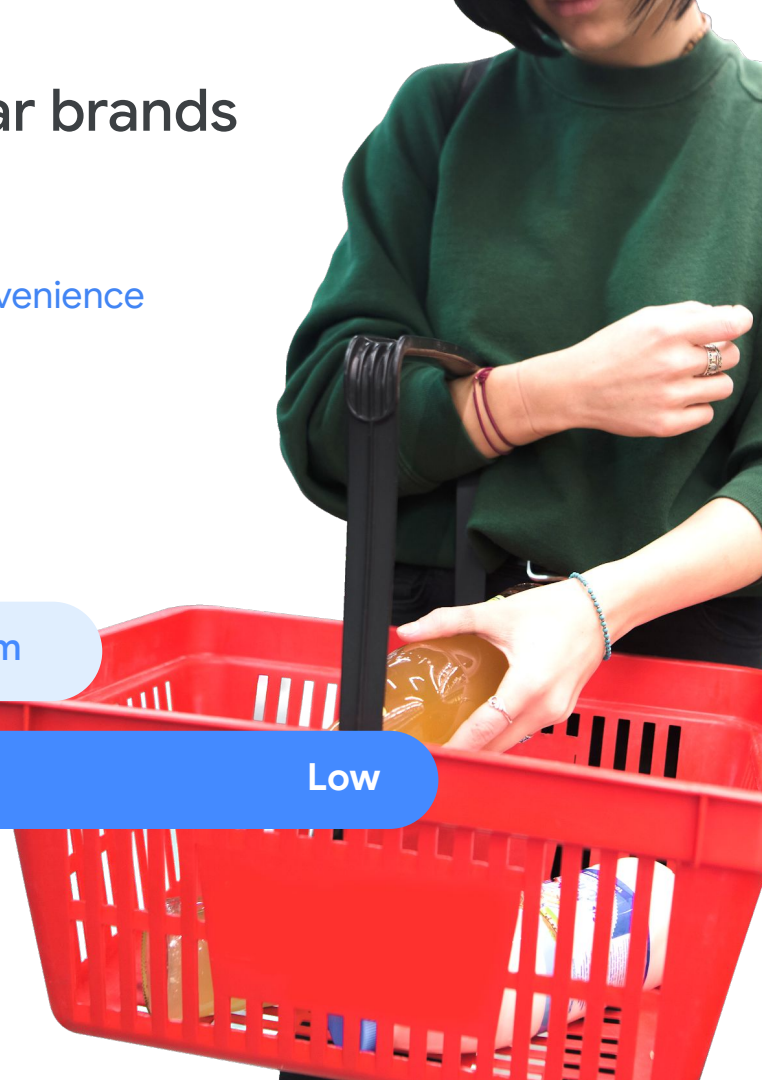
High

33.6%

Medium

50.3%

Low



To consumers top-ups feel 'riskier' than their main shops



If the store they go to doesn't have the items they wanted they risk:



Making a wasted trip (loss of time)



Having to go to another store



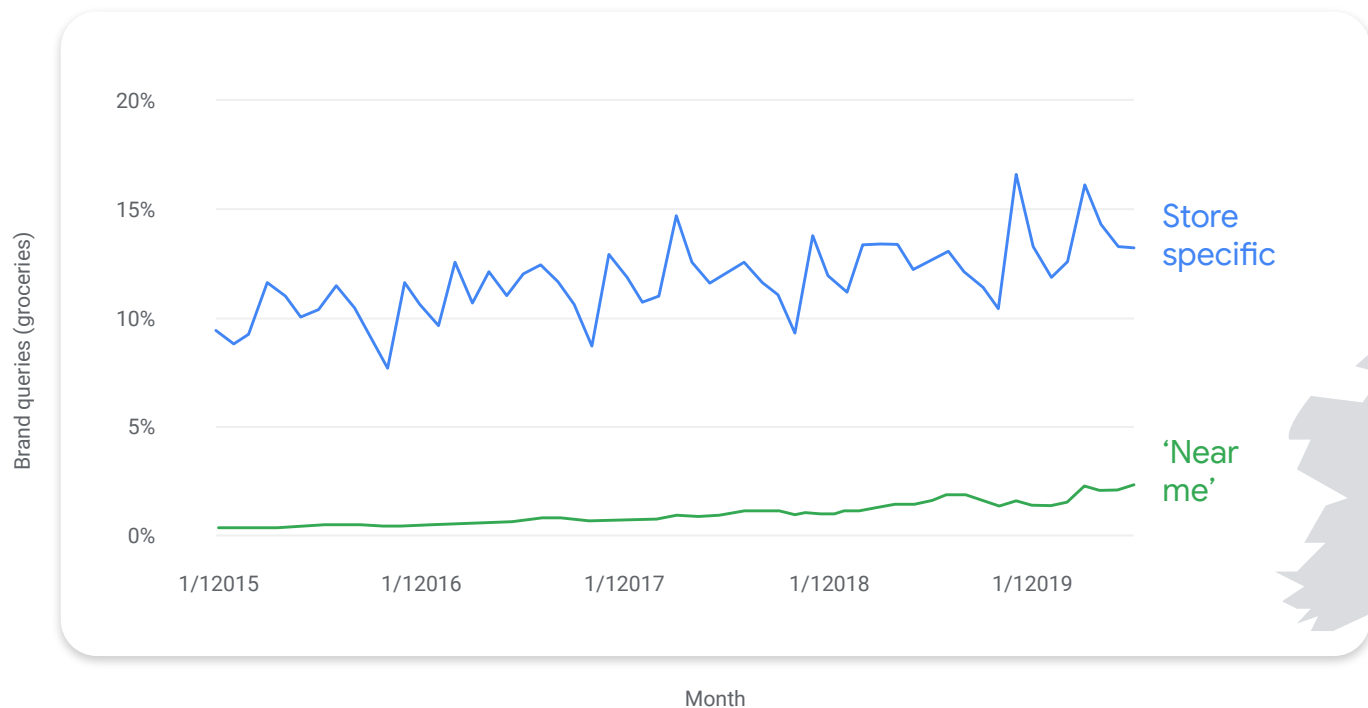
Spending more money than they'd planned on things they don't really need



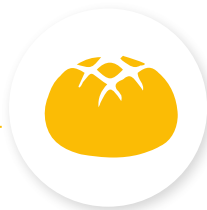
Buying things that are less healthy on impulse






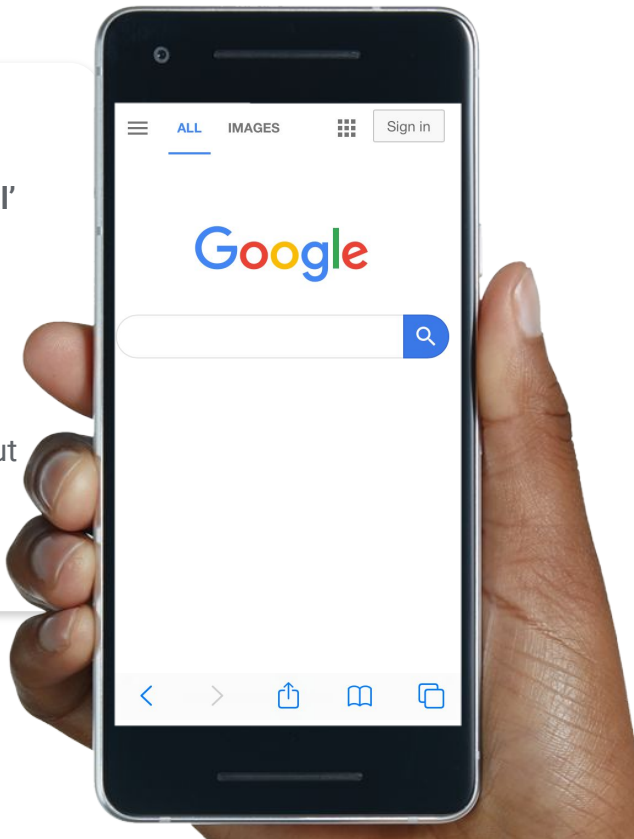
We see customers increasingly searching for **specific stores**



In Search we see interesting store-demand dynamics



-  Local demand to store might **not actually be 'local'** when people are Searching for specific stores
-  Consumers **are researching for convenience** missions before they go to store
-  The **scale** and **complexity** of online store-directed demand is vast and challenging to address without using advanced technologies



The **shape** and **reach** of store demand changes by location



South west train lines

This map shows us the reach of demand to grocery stores in London Waterloo Station. The darker the colour, the more dense the searches in that postal district. We can see clearly that demand to these stores spreads right across the South West Train Line, not just in the station's immediate catchment.

The **shape** and **reach** of store demand changes by location



Brighton

This map shows us the reach of Search demand to grocery stores in the Brighton area. We can see that 60% of this Search-based demand comes from outside of this area.