How is COVID-19 changing Nordic grocery retail?

Data-driven insights into the digital consumer experience

accenture

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Introduction

The Covid 19 pandemic is transforming Nordic grocery shopping... probably forever.

The pandemic immediate impact on the Nordic grocery market was dramatic. Fear of contagion drove many consumers away from physical stores and towards online shopping options, leading to the ultimate stress test for traditional grocers. Several basic product lines rapidly ran out, and delivery slots were booked out weeks in advance.

As the panic diminishes, a more nuanced picture of consumers' desires is emerging. Heightened concern about hygiene, reinforced by new regulations, is likely here to stay. In addition, consumers, while increasing their digital engagement, also want the flexibility to engage in ways that suit them. A majority of consumers now expect a seamless and tailored omnichannel shopping experience that acknowledges their individuality and supports their willingness to shop smarter and more sustainably.

Grocery retailers who can innovate to meet these new consumer needs, to offer personalised and tailored experiences, will establish competitive advantage now and in the future.

Rising expectations: The new digital consumer wants a sustainable, seamless shopping experience

The sustainable consumer

62%

of Nordic grocery shoppers would spend >5% more for sustainable options and would welcome initiatives that reduce plastic packaging and food waste, or offer a wider range of local or organic products.

The seamless experience

63%

of consumers are either bored or confused by current loyalty schemes. Younger shoppers in particular seek programs that offer flexible, tailored experiences that would help them achieve their personal goals.

...and here's what Nordic grocery retailers should focus on to enable it

Building a solid foundation for digital

This is plainly fundamental, yet...only 53% of the grocery retailers we reviewed offered next-day delivery options, and we found as much as a 350% variance in delivery costs between retailers. **Apps will clearly play a major role in facilitating seamless omnichannel shopping, yet**...less than half of the apps we reviewed offered curated content beyond the ability to search for and buy products.

The (digital) in-store experience

Consumers will increasingly move between physical and digital shopping options and expect to be supported across both. **Apps are uniquiely positioned to provide the location and situation specific experiences consumers desire.** 75% of consumers also indicated that **contactless shopping would entice them to shop in-store with a grocery retailer.**

Adapting to new service offerings

91% of customers say tailored delivery options and suitable timeslot are crucial to their online shopping experience. **Consumers now want to be included in the product lifecycle calculation.** They also want delivery options that work for them as well as support in meal planning and advice designed to enhance their grocery shopping experience.

The future is omnichannel

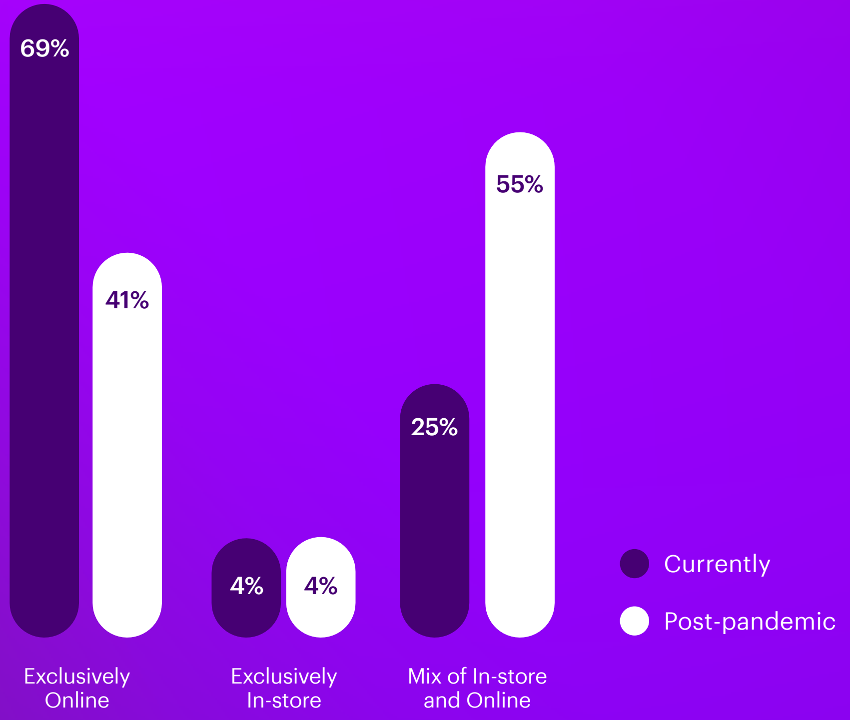
Covid19 has accelerated digitalization, consumer needs are volatile and competition is intense.

New ways of shopping are challenging long-held assumptions about the value propositions that can secure competitive advantage. Shifting consumer desires are compounding the struggle for differentiation. Success hinges increasingly on creativity-yet finding the right creative mix is proving elusive. Price still matters to consumers, but sustainability, transparency and purpose are just as important-perhaps more so. Online shopping is booming, but people still yearn for in-store social contacts. Their preferences are increasingly omni-channel, yet constantly changing.

National, regional and above all demographic differences complicate the picture. The young in particular seek more than a transactional relationship and demand meaningful experiences when they shop.

Post pandemic, a mixed approach to grocery shopping will dominate with consumers using both physical and digital channels.

By creating digital touchpoints between the physical and digital experiences, grocers will develop a deeper understanding of consumer behaviours and evolving needs.



Introduction

The pandemic has changed what consumers value and has accelerated the demand for sustainable and responsible products and businesses.

Our research shows that consumers are willing to make significant changes to the way they shop, the money they spend and the way they eat to become more sustainable.

	Change my eating habits	Shop more frequently	Shop / receive deliveries on fixed days / at fixed times	Use more tech in my shopping journey	Sign up to a monthly subscription service	Willing to do more for themselves when shopping	Pay more	Refill containers in-store / at delivery	Group buying with family / friends
Save money	30%	21%	21%	19%	19%	19%	-	20%	15%
Reduce food waste	33%	19%	17%	16%	13%	13%	9%	17%	12%
Make shopping easier	16%	18%	22%	21%	18%	14%	10%	12%	13%
Save time	16%	15%	26%	20%	21%	13%	11%	10%	12%
Buy more locally sourced / produced goods	22%	19%	16%	14%	14%	10%	25%	11%	11%
Eat better and make healthier choices	43%	24%	14%	19%	14%	17%	19%	16%	9%
Reduce my carbon footprint	27%	15%	16%	16%	15%	13%	18%	13%	13%
Cook more / be a better cook	30%	23%	15%	16%	16%	16%	13%	12%	11%
Adopt a different diet (e.g. vegan, dairy-free)	35%	16%	16%	14%	15%	9%	13%	7%	14%

More than 20% of consumers say they'd be willing to take this action to achieve the corresponding change

10 – 20% of consumers say they'd be willing to take this action to achieve the corresponding change

Less than 10% of consumers say they'd be willing to take this action to achieve the corresponding change

The research

We asked 1600 Nordic grocery consumers...

to tell us about their shopping behaviours in both physical and digital stores.

The survey was also extended globally, adding 8 countries to produce a total response rate of 4800 consumers.

To complement the customer survey, we conducted a **digital consumer experience review of 15 Nordic** grocery brands across 45 touchpoints for Web, Mobile and App.

We also conducted **interviews with key stakeholders from the industry** to deepen our insights, and utilized existing Accenture research into grocery retail, consumption and changing trends.

Digital Consumer Experience Review

Each of the **45 touchpoints for Web, Mobile and App** across the **15 Nordic grocery brands** was assessed against 5 key components of the consumer experience: Shopping, Sign Up, Logged In, Checkout, and Delivery. The results were evaluated against a usability scale to provide a final score.

Scores were then consolidated and weighted across touch points and countries to provide an individual country score, and subsequently an overall Nordic position.

The sustainable consumer

Sustainability means different things to different people—but for most grocery shoppers it's all about smarter, healthier, less wasteful options.

The concept of sustainability covers, but is not limited to, reducing food waste and carbon footprint as well as store- and stock planning. It also includes "green" product options that can be a mix of in-season, organic, locally produced or with a limited negative impact on the climate.

Grocery retailers have made significant strides in reducing product waste in recent years. In fact, they have never invested more in sustainability. Yet consumers still aren't experiencing and recognizing their efforts. Information about sustainable options is often provided separate to the core consumer journey, leaving the consumer to search out, rather than be guided towards more sustainable choices.

Closing the gap between the current and desired consumer experience should be a priority for grocery retailers.

62%

of consumers are willing to spend more for sustainable grocery options--but they also want help in making more sustainable everyday choices.

73%

would be willing to switch to a retailer that better understood how important sustainability is to them – a significant opportunity to guide users to more sustainable products, delivery options and recipes, for example.

Top 3

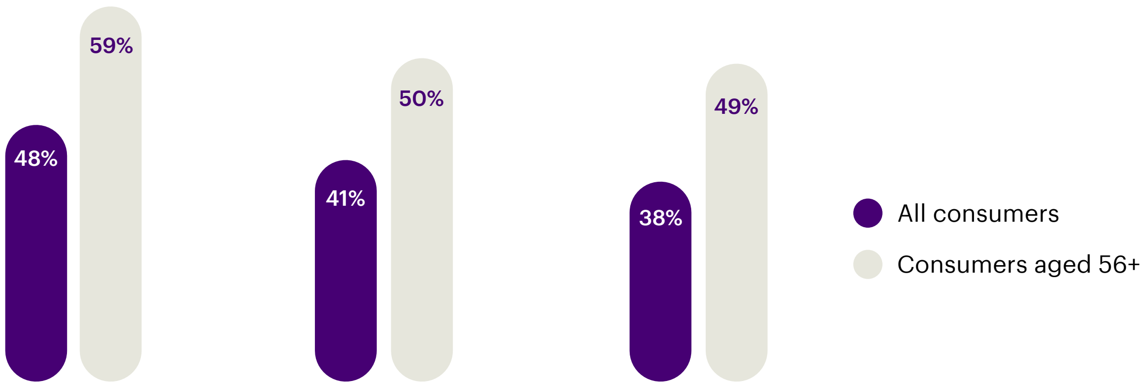
Actions consumers are willing to make to reduce their food waste

- Change their eating habits
- Shop more frequently
- Receive deliveries on a more fixed date

Older consumers are the strongest sustainability advocates

Consumers aged 55+ are the strongest sustainability advocates. Our research reveals the potential financial impact of this powerful demographic on retailers who can leverage sustainability as a differentiator in the future grocery store.

Top sustainability related initiatives that would entice consumers to shop with a particular grocery retailer over another:



Industry inspiration

Greenplan[1] —a startup company funded by DHL—has developed an algorithm that supports green route planning.

The algorithm accounts for inputs including carbon emissions of each vehicle type and range limits of electric vehicles. The focus is on creating efficient routes that are aligned with traffic flow so that planned tours and stop sequences make sense to drivers.

Recommendations for retailers

Consumers are willing to invest in more sustainable choices—especially consumers aged 55+. Catering for sustainability in the future store will be a key differentiator for retailers. Those that can successfully guide their consumers to make smarter, more sustainable choices will gain both market share and margin—a win/win in an increasingly competitive game.

To bridge the gap between consumers' current and desired experience retailers should:

Make it easy to be a sustainable consumer:

Give green options more prominence in digital merchandising – promoting in-season items, locally produced goods and green options using digital features such as toggles, filters and personalization. Clearly communicate how origin, organic vs non-organic and many other classifications impact how green a product is – and help explain the price difference.

Help consumers to reduce their waste:

Help consumers reduce their waste by leveraging data and personalization to recommend the right quantities for specific needs and offering recipes that make better use of what's in their cupboards and limit leftovers. Reduce or entirely remove plastic packaging and replace it with more eco-friendly materials.

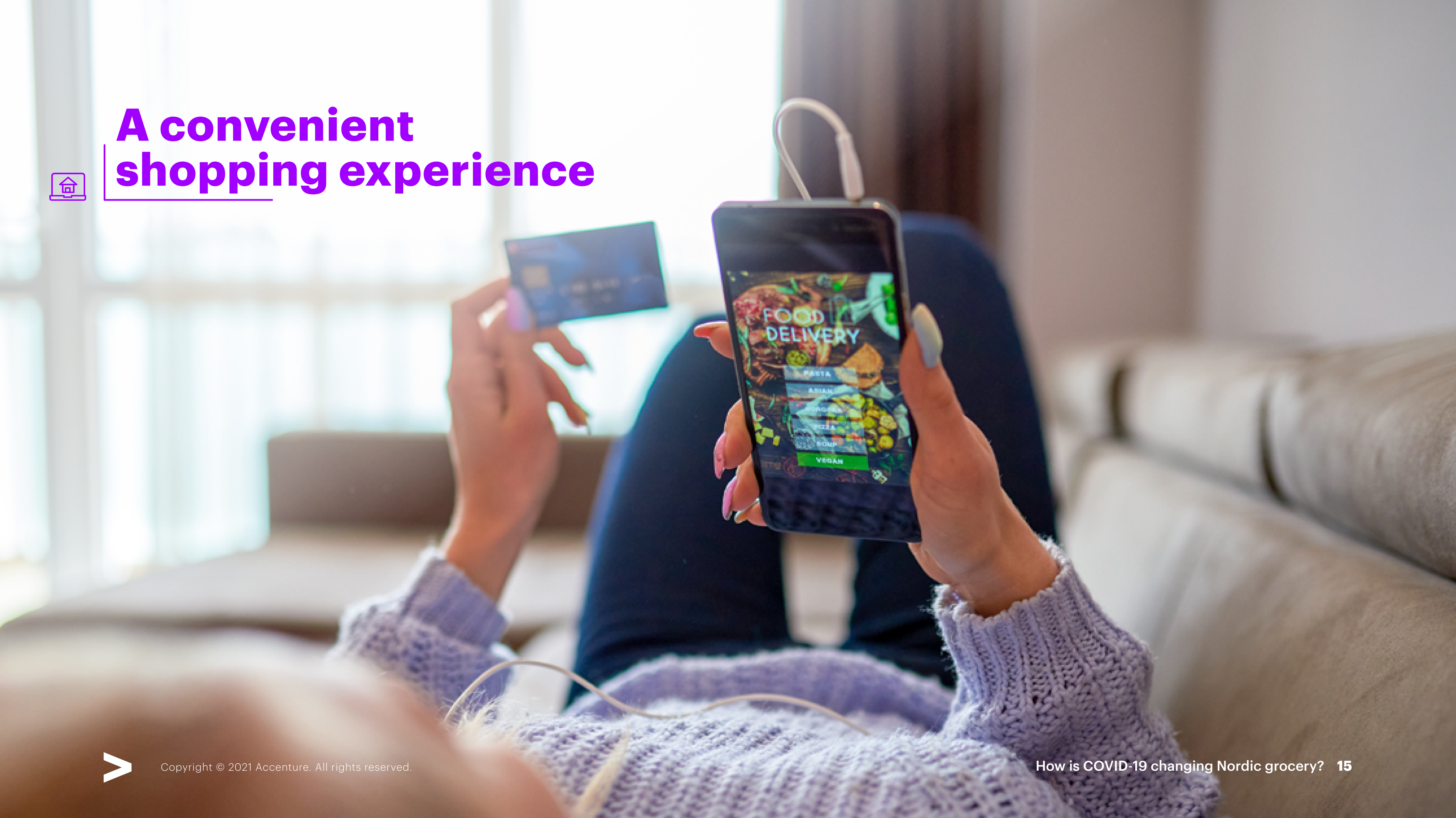
Remember that sustainability doesn't end at check-out:

Optimizing the parcel size for digital orders will increase the overall cost-efficiency of fleet management. Vehicles can increase their capacity, thus reducing the number of transports required. It's also critical to work across the ecosystem to understand the unseen costs of last-mile delivery and pursue change. Retailers need to invest in innovative technologies, incentivize consumers to make greener choices, re-think stores, and utilize data to optimize inventory and route management to reduce carbon footprint.

Consistency is key:

To be successful players in the long-term retailers need to be able to scale sustainability through the consumer experience and that means making reliable and consistent product information available right across the product range.

A convenient shopping experience



A convenient shopping experience

The accelerated transition towards digital shopping exposes grocery retailers to ever increasing comparison when it comes to range, product availability, ease of shopping and delivery options that suit customer needs.

- 55% of consumers will shop both online and in-store post pandemic.
- Consumers seek retailers that offer a wide product offering and can deliver in a speedy and cost-efficient way. But our research reveals a 350% difference in the cost of delivery and minimum spend of up to €80, which excludes many.
- The inability to choose my own products was listed as the leading reason why consumers are reluctant to shop online; a difficult challenge for retailers to overcome and perhaps one of the core reasons why consumers will shop omnichannel in the future.
- 93% of consumers indicate that being able to finish their shopping as quickly as possible is the most important part of the online shopping experience. While the ability to navigate and search for products is similar across most brands, there is greater variance in product merchandising and the sign-up process.

55%

of respondents will continue to shop both in-store and online post pandemic

4% will only shop online

Variance

>350%

Delivery price ranges from €2–€9 with a minimum spend of up to €80

Inability to choose my own products

Was listed as the biggest barrier for shopping online

The sign-up process is a significant differentiator in the consumer journey

The sign-up process is where shoppers can find the greatest variance. Sign-up steps can range from a 30 second process with only a few data entry points to being asked for all details up front with no autofill. None of the retailers covered by our research offered the ability to check-out as a guest and in many scenarios the product range offered online was determined by postcode – indicating that the consumer's nearest store determines both product availability and delivery service.

Key insights

10/15
Experiences enabled users to view the contents of the app without signing up

11/15
Curated/inspiration content on Web

13/15
Offered at home delivery

7/15
Experiences had a 'quick-step' signup with 4 steps or less

7/15
Curated/inspiration content on app

8/15
Offered next-day delivery options

Industry inspiration

Berlin-based Gorillas[2] lets you order everyday items with a delivery time of as little as 10min.

Consumers pay ~ €2 for delivery and can choose from more than 2000 items, which are fulfilled from a "dark store".

Since launching, Gorillas has raised €290 million in funding and its valuation has surpassed €1billion. It now operates in 12 cities in Europe, including Amsterdam, London and Munich and is steadily expanding.

Recommendations for retailers

Consumers' shopping missions vary as much online as they do in store. The digital experience needs to include a wide product offering and convenient delivery services. The biggest challenge for online– picking your own products – needs to be addressed by improving product merchandising.

Harmonize product offerings for online consumers

More delivery service options and speedy delivery at affordable prices will be key to securing continued growth in online sales. Business models where fulfillment centers and dark stores are responsible for all digital orders ensure a much more consistent product offering. Deliveries can be expedited efficiently, at reduced cost and with a smaller overall carbon footprint.

Creating additional product selections online—riper bananas, for example—can help address the inability to choose your own products.

Cater to your consumers' constantly shifting shopping missions

Customers shop for groceries with different mindsets at different times. At a high level, they split into Hunters or Browsers. Hunters look for speed and efficiency, which makes product recommendations and autocompletion of the shopping basket key. Browsers are more interested in inspiration in the form of recipes and similar content. These contrasting mindsets are device independent, determined by the customer and retailers need to keep pace with them by aligning content and product recommendations accordingly.

Make it easy to sign-up for online shopping

Many retailers still require customers to provide information about themselves even before they start browsing, often because the consumer's location is linked to fulfillment. Cutting as many steps as possible from the check-out flow will reduce drop-out rates. Reducing the number of non-essential data entries until post-purchase will faciliate analysis of customer journies because fewer interactions are added to the core journey – and that means fewer distractions!

Apps are kings of contactless, seamless shopping

Apps are the kings of contactless, seamless shopping

As post-pandemic hygiene and safety rules and regulations reduce interactions between customers and staff, contactless shopping has never been more in demand. And because they facilitate seamlessness, apps are key to delivering it.

- A clean and interesting store, a wide product range and a convenient location are the Top 3 elements that bring value to the in-store experience for consumers.
- Overall product availability is critical, and having a clear understanding of the stock available at a particular store can determine both which channel to purchase from and how satisfying consumers find a store visit.
- Consumers are interested in digital aids in-store and want contactless shopping that also allows for payments. Although most stores already offer digital touchpoints, the process often involves sharing equipment such as scanners, and swiping loyalty cards: a health and safety concern that results in additonal cleaning and maintenance requirements.

2 out of 3

consumers want interactive elements while they shop in stores

75%

of consumers indicated that contactless shopping would entice them to shop in-store with a grocery retailer

Top 3

What brings value to the in-store experience

- A clean and interesting store
- Offering a wide product range
- Convenience, store location

Apps need to evolve

Consumers want contactless shopping—but they also need help in choosing the right products and finding what they need in-store. The app is prefectly positioned to support these shopping needs—but our research shows that despite the progress made, most retailers have a way to go before the consumer experience reaches the next level.

Key insights

8/15

Apps have a scanning feature, enabling users to add items to their shopping cart / check-out

11/15

Apps have a shopping list feature, where users can manually add products either by searching for them, or scanning

3/15

However, only three of them allow the user to pay using the scanning feature

3/15

Retailers have a feature which sorted the items on your shopping list based on the store of your choice

Industry inspiration

The app Freshhippo[3] is used continually in-store for scanning and payments but can also be used to scan QR codes for product details and inspiration.

At some stores, shoppers can pre-order hot meals, then pick them up after scanning a QR code from heated lockers. Freshhippo stores also act as a local fulfillment hub, and offer delivery for purchases in-store within a 3km radius. Munich and is steadily expanding.

Recommendations for retailers

Customers want a contactless, seamless shopping environment. Apps, in combination with technologies that ensure product availability and clean and safe shopping, are uniquely positioned to help them.

Invest in technology that ensures availability and transparency:

Smart shelving and other sensor-based technologies offer next-generation inventory management to serve stores, warehouses and online. They enable real-time stock inventory that can service consumers across all digital channels, including notifications on stock availability and location in-store, as well as improving forecasting capabilities for re-stocking products and warehouse planning.

Leverage apps for seamlessness:

Together with functionalities such as integrated shopping lists, scanners and payments, apps enable a seamless shopping experience from planning to purchase. In addition, the digital footprint they create gathers valuable insights on in-store vs online behaviours and the overall consumer journey.

Keep it clean:

Sensors can be used for product re-stocking and other maintenance jobs that improve cleanliness and boost consumer satisfaction; hand sanitizers, traffic control and facility management in-store, for example. Digital product location guidance in-store can also reduce contact between consumers and personnel, which in light of the pandemic is a safety measure of great value.

New offerings for new shopping missions

New offerings for new shopping missions

The pandemic has accelerated the grocery industry's shift to digital—and exposed a neglected yet critically important demographic: the single household.

The Nordics have one of the highest proportions of single households in the world—yet our research shows that single households are excluded from today's online subscription services, which start at a two-person minimum.

Post-pandemic, retailers have a huge opportunity to influence both the content and the frequency of consumers' shopping expeditions over time. But they need new offerings that cater for on-demand, top-up shopping and especially for small households on multiple and constantly shifting missions.

New store concepts already leverage advanced technology to create the seamless shopping experience that enables stores to shift their internal capabilities towards serving more new needs. Retailers should also consider:

- Ensuring that deliveries can be made at a time and place that suit the consumer.
- Offering the same products online that consumers would expect to be able to choose from in-store.
- Providing more inspiration and guidance.

91%

of customers say delivery options and suitable time slots are crucial to their online shopping experience

Variance

~37%

Is the average cost increase per portion for 4-person vs 2-person meal plans - and no retailer offers solutions for single households

>40%

Single households in the Nordic

Single households are excluded from today's subscription models

Our research shows that the few retailers offering subscription models have adapted these to fit the needs of households of 2 or more adults only. What's more, there's an average price increase of 37% per person when less than 4 persons are included in the model. The outcome: single or few-people household, representing a large part of the Nordic market, are essentially not catered to or are less likely to commit to a subscription model due to costs.

Key insights

13/15
Retailers offered an at-home delivery service for their customers

4/15
Offers a subscription model to their consumers

8/15
However, only eight of these also gave the option of a pick-up service.

0/15
However, no retailer offers a subscription model for single-households

Industry inspiration

Amazon Go[4] Grocery is one of the few brand concepts to enable a seamless shopping experience with no check-out required.

Utilizing cameras, sensors and AI technology to ensure that consumer cart payments are automatically processed through Amazon wallet. These technologies are now being sold to other retailers as a service.

Recommendations for retailers

The Nordic countries have some of the highest percentages of single households in the world, with more than 40% of the Nordic households consisting of only one person.[5]

These households are not being catered to by the subscription services currently on offer and thus represent an opportunity for grocery retailers to improve their market position. Since consumers also seek a convenient shopping experience, technologies that cut queues and check-out time as well as ensuring fast and convenient delivery can significantly boost efficiencies.

Cater to all demographics:

Simplify the consumer experience by proposing a variety of meal-plan and subscription models that allow for high-margin and cost-efficient planning with minimal waste.

Find new ways to deliver:

Given the rapid increase in online sales, delivery services are becoming a key differentiator. They need to be managed at the convenience of the consumer and be flexible enough to continuously evolve. Consider extended ecosystem partners and introducing delivery methods such as pick-up boxes, robotic food delivery and other pandemic-driven innovations.

Introduce the 'smart shop'

Smart shops allow for a seamless customer experience by offering virtual shopping baskets and connected payments that eliminate such traditional in-store experiences as queuing and check-out. This will enable a more efficient shopping experience but will also prompt a re-think around the capabilities needed in the in-store workforce.

The seamless personal experience

The seamless personal experience

Traditional, transactional consumer loyalty programs in grocery retail are no longer luring shoppers. In fact, 63% of consumers are either bored or confused by them.

Many, and especially younger generations, want loyalty programs that transcend the transactional to help them achieve unique, personal goals. By providing such experience-based loyalty programs, grocery retailers can build an emotional connection with consumers as individuals and reap premium rewards. In-store notifications on current product offerings - either before or during the store visit - could, for example, be a significant differentiator.

- 55% of consumers would like to see retailers offer cooking classes and catering for special events and smaller gatherings
- 91% of consumers want personalized home deliveries; an opportunity to take convenience to the next level by including premium delivery options in loyalty schemes.

Data is key to understanding consumers personal preferences and behaviours and building individually relevant, personalized experiences. But it is equally important to keep data safe and ensure a safe shopping experience for the consumer – both physically and psychological.

63%

of consumers are either bored or confused by current loyalty schemes

68%

say that receiving digital notifications on current product offers either before or during their shopping experience could entice them to shop in-store with that retailer.

55%

of shoppers want to be offered cooking classes, catering for special events and catering services

Experience vs. satisfaction

To achieve consumer satisfaction, retailers need to consider not only the shopping journey (both physical and online) but also how well their value propositions cater to individual needs.

Key insights

A good user experience does not guarantee consumer satisfaction. Although Sweden was the best performing country in the digital consumer experience review, it was also the worst performer when it comes to loyalty programs.

A handful of Nordic retailers are currently testing the contactless concept, with several stores already up and running, and more planned to launch within the year.

Industry inspiration

The 'DIY' restaurant experience – cook it yourself at home!

Many restaurants in the Nordics and beyond have adapted to the pandemic by introducing a new offer – ready-to-cook meals. These can be a single dish or a full menu that consumers can order online and cook at home. Many offers are very affordable and provide an alternative to the traditional dine-out experience.

Recommendations for retailers

Experience-based loyalty builds a relationship with consumers through seamless, personalized experiences. To enable that essentially emotional connection, retailers need to consider, for example, facilitating forums and communities that inspire consumers and help them set and achieve personal goals.

Transcend the transactional:

Product discounts, point systems and competitive prices are standard features of current loyalty schemes. But although consumers still value such benefits, they also yearn for more, especially as they shift towards digital. Consider introducing premium delivery options, or offering coaching experiences combined with setting goals and recognizing milestones.

Expand your online communities:

Cooking classes and product demonstrations are examples of experience-based loyalty options. And the pandemic has opened up new opportunities to create new types of online communities. Consider innovative subscription models, partnerships and collaborations with external vendors to build new forums for engaging content.

Wow, that is seamless!

In essence, consumers are expecting experiences that span channels and shopping missions that unify those experiences, from browsing through to purchase. Information needs to be accessible across all digital touchpoints, and interactions must be relevant, timely and align with individual needs. Increase your use of smart technologies and apps in particular.

In summary

In conclusion, here are our key take-aways for Nordic grocery retailers

Make it easy to be a sustainable consumer!

Customers are willing to invest in sustainable produce. Consumers aged 55+ are the strongest advocates for sustainable grocery shopping. Catering for sustainability in the future store is a differentiating factor and potentially a win or lose game. It is essential that Nordic grocery retailers invest in making it easy to be a sustainable consumer.

Don't forget the single households!

The Nordic countries have some of the highest percentages of single households in the world but they are not being catered for in the subscription services offered.

Grocery retailers that can deliver cost-efficient services to smaller households can expect an improved market position.

Re-define what convenience means!

Consumers shopping missions varies as much online as they do in stores. The digital experience needs to cater for those needs with a wide product offering and delivery services at the customers own conveniance. Seeking business models where fulfillment centers and dark stores are responsible for all digital orders ensures a much more consistent product offering to all customer. However, the biggest challenge – picking your own products – needs to be addresseded for the online by improving the product merchandising.

Drive value through customer intimacy

Experience loyalty relies on the relationship you build with your customers through personal experiences. In order to achieve this retailers needs to re-consider what brings value to customers to meet new needs and demands post pandemic. Create forums to inspire customers, help them set and achieve personal goals and offer them services that they value to build an emotional connection!

The app is king!

Customers wants a clean and safe environment that allows for contactless shopping. Additional investments need to be made in in-store technology that enables consumers to use the app to navigate stores, find products and pay in a seamless way and eliminate steps like queuing and check-outs.

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Resources

1. https://www.parcelandpostaltechnologyinternational.com/features/dhl-outlines- plan-to-shake-up-the-last-mile-space-with-new-green-route-planning-algorithm.html

2. https://techcrunch.com/2021/03/25/gorillacorn/

3. https://www.indigo9digital.com/blog/futureofretailalibaba

4. https://www.amazon.com/b?ie=UTF8&node=20931388011

5. Single households:
Overall message ”>40% of all households in the Nordic are one-person households
Denmark: 44%
Reference link: https://www.statista.com/statistics/582664/number-of-households-in-denmark-by-type/
Norway: 40%
Reference link: https://www.statista.com/statistics/586985/population-by-type-of-family-in-norway/
Sweden: 40%
Reference link: https://www.statista.com/statistics/526013/sweden-number-of-households-by-type/
Finland: 45%
Reference link: https://www.stat.fi/uutinen/finland-in-figures-2021-is-about-all-of-us

The research – Detailed findings

Digital Customer Experience Review
Key findings

Sign up

The highest ranking experiences in the sign up category had all divided their sign up process, meaning that they only asked the user for information when it was relevant, thus marginally reducing the time it took to sign up.

Online shopping

The highest ranking experiences in the shopping category all featured relevant and engaging content, appealing product photos, omni-channel access, easy navigation as well as new and enticing features.

Pick up and delivery

The highest ranking pick-up experiences in the delivery category had designated pick up boxes which also served as fridges or freezers, depending on the product. They were located at convenient locations and you easily open them using a code or phone number.

Online checkout

The highest ranking online checkout experiences all had a few things in common; no minimum cost for purchase, convenient delivery time slots, and different payment options. They also had a clear and clean UI, without too many distracting elements.

Weighted Scoring results

Nordic Results	App	Mobile	Web
Shopping	3,03	3,5	3,2
Sign up	2,9	2,8	2,75
Logged in	3	3	3
Checkout	2,9	3,1	3,1
Delivery	3,2	3,2	3,2
Total	**3,00**	**3,12**	**3,05**

>1 >2 >3 >4 >5

Digital customer experience
Evaluation level scale

Each key area has been evaluated for usability issues and quality of experience with the following scale and corresponding colours.

1	2	3	4	5
Missing key features, or digital experience had major usability issues. Substantially below expecations.	Missing some key features, or digital experience had minor usability issues. Below expectations.	Some or all key features in place. No usability issues. Met expectations.	All key features plus some extended features. No usability issues. Slightly above expectations.	Key features and several extended features. Innovative and positively surprising experience. Substantially above expectations.

Digital customer experience
Weighted scoring example

The final scoring is a weighted scoring across all touchpoints. Meaning that the total scoring can be higher or lower than the average score as the total number of brands vary from country to country.

Weighted Scoring results

	Company 1	Company 2	Company 3	Company 4	Company 5	Total
Shopping	3,5	2	2,5	3,2	3	**2,8**
Sign up	1,5		2			**1,75**
Logged in	2,3	1,75	3,5	2,75	2,8	**2,62**
Checkout		3,5	3,7	3,5		**3,5**
Delivery		3,7	2,5	1,5		**2,5**
Total	**2,4**	**2,7**	**2,8**	**2,7**	**2,9**	

>1 >2 >3 >4 >5

Research areas

The following areas in the digital touchpoints were examined and evaluated for 15 brands across the Nordics - covering a total of 45 touchpoints for Web, Mobile and App

Shopping experience

- Ease of navigating to products
- Ability to scan products using phone
- Filtering options on for ex. Product and dietary options
- Ability to scan producs using phone

Sign-up experience

- Register vs guest checkout
- Steps in the sign-up process
- Data requested for sign-up
- Autofill / quick login / remember me

Logged-in experience

- Offers - Products and services
- Bonus points / cash back
- Product & content recommendations
- Preference settings

Checkout experience

- Delivery options
- Delivery cost
- Delivery timeslots available
- Payment options
- Subscription offers available

Delivery experience

- Proof of delivery
- Amount of packaging
- Post-purchase communications
- Split deliveries / missing items / damaged goods
- Customer service information including returns

Research outcomes
App

Weighted Scoring results

Nordic Results	SE	NO	DK	FI	Total
Shopping	3,4	3,2	2,25	2	**3,03**
Sign up	3,8	3	1,75	3,5	**2,9**
Logged in	3,7	4	2,25	3,7	**3**
Checkout	3,25	3,5	3	2	**2,9**
Total	**3,3**	**3,2**	**2,4**	**3,0**	**3,0**

>1 >2 >3 >4 >5

The biggest differentiator whilst using app versions was the sign up experience. The highest ranking retailors offered a quick sign-up, either using some form of Bank ID, or very few data collection fields, making it as quick as possible for the consumer to get into the app and start using it.

Recommendations: If possible, explore sign-up solutions using some type of quick sign up or identification – which makes the sign up process familiar to the user and they do not need to remember additional login information for more services. Alternatively, reduce the amount of data input requests early in the process – only ask for what is crucial, and ask for additional information in a later stage, such as adress etc.

Whilst conducting the research, we noticed that 11/15 retailers had included inspirational, curated content on their websites, but only 7 of 15 had done the same in their corresponding apps.

Recommendations: We are heading towards a culture where people spend more and more time on their phones, and one recommendation we have is to include more of the inspirational content on the apps as well – to become a part of your users day to day life.

Research outcomes
Mobile

Weighted Scoring results

Nordic Results	SE	NO	DK	FI	Total
Shopping	3,8	3,2	3	3,5	**3,5**
Sign up	3,6	2,6	1,75	3,5	**2,8**
Logged in	3,7	4	2,75	3,7	**3**
Checkout	3,2	3	2,75	3,5	**3,1**
Total	**3,4**	**2,9**	**2,5**	**3,6**	**3,12**

>1 >2 >3 >4 >5

When browsing on mobile web, omni-channel features stood out as important – making it easy for the consumer to start their shopping or browsing experience at home, and possibly continuing on the go.

Recommendations: Always ensure that your platform is built for omni-channel purposes – with the most important feature being shopping cart memory across devices. Other features that could be stored in an omni-channel fashion includes: last browsed recipes, last searched products, memory of login credentials, checkout details and more.

The retailers that ranked the highest in the mobile shopping experience were clean and easy to navigate in, with a strong hierarchy to limit information overload.

Recommendations: Conduct heatmap analysis of users' navigation behavior - in order to make informed decisions. Try to simplify designs as much as possible to limit cognitive overload for the user. Follow best practices.

Research outcomes
Web

Weighted Scoring results

Nordic Results	SE	NO	DK	FI	Total
Shopping	3	3,6	3,5	3,5	**3,2**
Sign up	3,4	2,6	1,5	3,5	**2,75**
Logged in	3,7	4	2,25	3,7	**3**
Checkout	3,2	3	3	3,5	**3,1**
Total	**3,2**	**2,9**	**2,4**	**3,6**	**3,05**

>1 >2 >3 >4 >5

Almost all retailers that we researched had some sort of recipe section included in their web experience – but the ones who scored the highest took it a step further – with innovative solutions and enticing features.

Recommendations: At the bare minimum, make sure you have a ''add to shopping cart'' button on your recipe pages. Just showing the recipe is not enough, you need to make it easy for the user to buy the products. Research how this content can be even more inspiring – recipe builder out of ingredients you already have? ''Sustainable'' toggle to switch out some items in the recipe?

Although not reflected in the combined sums, the different retailers had scored with a great variance in the checkout experience. Checkout is a critical stage, and the ones who scored the highest had one thing in common; they made it easy for the user to checkout and finish the flow – both by design and also with payment and delivery options.

Recommendations: Don't overwhelm the user with too much information in this stage, but rather divide the process in clear steps. Explore several methods when it comes to payment options, and ensure that delivery timeslots are relevant and attractive for the user, and that there is sufficient resources to serve that demand.

Research outcomes
Delivery

Weighted Scoring results

Nordic Results	SE	NO	DK	FI	Total
Delivery	3	3	2,8	4,25	3,2
Total	3	3	2,8	4,25	3,2

>1 >2 >3 >4 >5

The Finnish retailers ranked high in the scoring model, due to high produce quality, smart use of packaging material, and good communications surrounding deliveries.

Recommendations: These days, consumers are more and more attentive to the sustainable choices retailers make (or do not make) – try to be innovative when it comes to packaging options – meaning; limit the use of plastic, and pack items smart to reduce excess waste.

The experiences that ranked the lowest had one pattern in common; poor communication surrounding deliveries and sometimes combined with missing items – leaving the consumer feeling frustrated.

Recommendations: Invest in a solid communication strategy surrounding deliveries, it's a crucial moment in the user journey. After placing their order, the user should easily see the journey their delivery takes, and be able to contact in most important stages of the process. Look to food delivery services such as Bolt, Uber and Foodora for inspiration.

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