INCISIV

Digital Maturity Benchmark Report

State of Digital Grocery 2019

An Industry Leaderboard

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Dosh is the fastest growing card-linked offer platform connecting grocers to consumers with automatic cash back when they make purchases, ultimately driving higher spend and brand loyalty. Directly integrated into major card networks, Dosh enables grocers to track advertising spend to every transaction, providing measurable attribution both online and offline.

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Mercatus helps leading grocers get back in charge of their eCommerce experience, empowering them to deliver exceptional branded omnichannel shopping experiences end-to-end, from store-to-door. Our expansive network of 50+ integration partners enables Mercatus powered grocers to work with their partners of choice, on their terms.

Supporting Sponsors

Takeoff

Takeoff's mission is to bring fresh and affordable groceries online! We work with grocers to integrate our automated grocery fulfillment solution into their existing business. Our Micro-fulfillment Center sits inside their store, working alongside their employees to fulfill orders on a hyperlocal scale. We give grocers the flexibility to embrace eCommerce on their own terms. Visit takeoff.com to learn more.

AIMIA
INSPIRING LOYALTY

At **Aimia** Intelligent Shopper Solutions, we decode the 'messages' that customers leave in the data and help translate them into simple, actionable insights that enable effective business decisions throughout an organization.

Table of Contents.

This is an executive summary report based on Incisiv's analysis of the digital presence of leading grocery and food banners.

75
grocery retailers / banners in US and Europe analyzed.

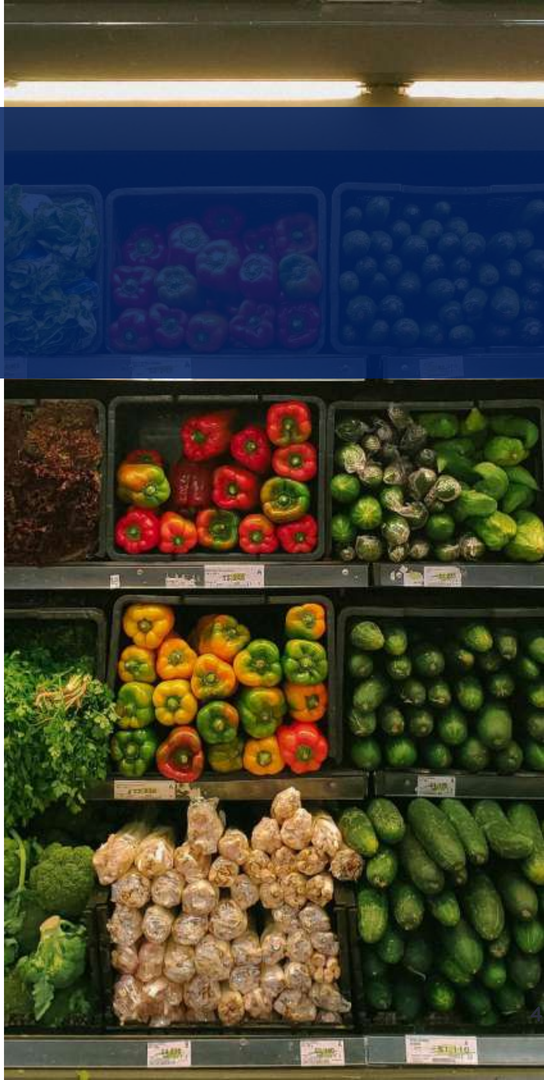
125
digital attributes studied for each banner.

15,000+
data points from Incisiv's industry data pool.

Unless otherwise specified, all data cited in this report is from Incisiv's 2019 Digital Maturity Grocery Report.

Chapter 1

The Digital Grocery Outlook: Poised For Explosive Growth.



The Grocery market is colossal when it comes to size and glacial when it comes to growth. Incremental growth or revenue often comes by stealing market share from the competition. This is why Digital presents both an incredible opportunity and big threat for grocers. With digital sales poised to grow close to 30% y-o-y (‘18-’25) in the US alone, providing a great digital experience is critical for grocers to stay relevant and keep on pace with customer expectations.

$157bn Digital grocery sales by 2025 (USA)

150% Growth of click and collect and third-party delivery capabilities. (2019-21)

Whether the grocery industry will be disrupted is no longer a question.

It is being disrupted now.

Grocers no longer compete with just their market competition.

They battle for consumers' stomach-share with an increasingly expanding and complex ecosystem that ranges from pureplay online grocers to direct-to-consumer brands.

Pureplay Online Grocery	Grocery Delivery by Retailer	3rd Party Grocery Delivery	Food Delivery by Restaurant	Third Party Food Delivery	Meal-Kit Subscription	Direct-to-Consumer
ocado	Walmart	instacart	Domino's	eats	Blue Apron	PERKY JERKY
amazon fresh	Kroger	SHIPT	Pizza Hut	DOORDASH	Plated.	
freshdirect	Roche Bros.	Google Express	Panera	deliveroo	HOME CHEF	jeni's

As shoppers embrace online grocery, new winners and losers will emerge.

The big players - Amazon (Whole Foods), Walmart (Jet.com) and Target (Shipt) – have placed multi-billion dollar bets on online grocery. And, further disruption is taking place with new partnerships (Kroger / Ocado) and a new set of digital upstarts such as Subziwalla (hyperlocal ethnic assortment) are quickly addressing market gaps.

ocado + Kroger

amazon + WHOLE FOODS

subziwalla

TARGET + SHIPT

Digital is the next battleground for customer relevance in grocery.

Online ordering drives revenue growth and competitiveness.

Online ordering is delivering greater than expected, net-new revenue growth.

Grocery retailers who have offered online delivery for at least twelve months, report **an increase of 15.8% in incremental revenue**, 30% higher than their pre-launch estimates.

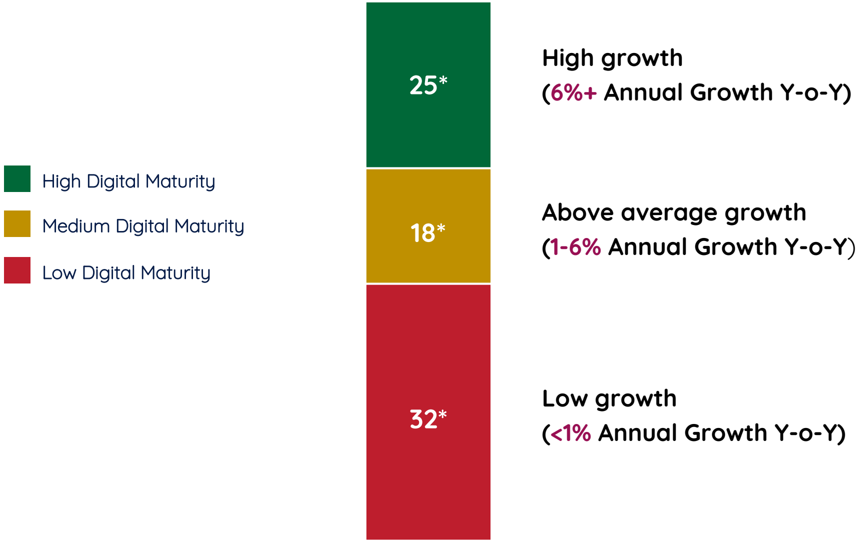
Further, most of this growth is net-new addition to the top line, with **only 18% of retailers experiencing cannibalization** of in-store sales by offering online delivery.

And, will drive the majority of growth over the next two years and beyond.

Digital grocery sales will double over the next two years, breaching $50B by 2021 before accelerating further to $150B+ by 2025, at which point they will account for 14% of overall sales (US).

Digital is the next battleground for customer relevance in grocery.

Digital leaders in grocery far outperform their peers in overall revenue growth.



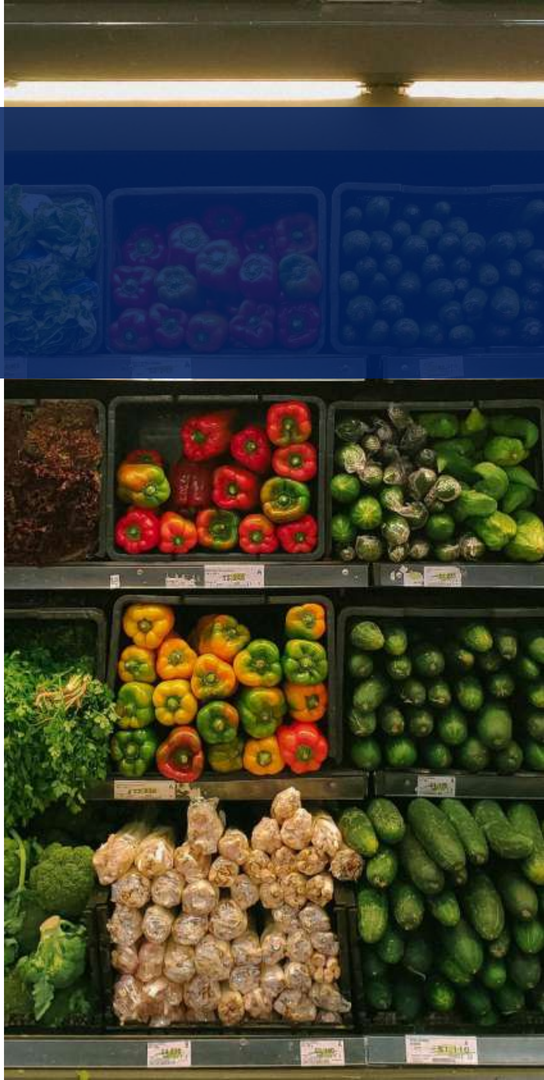
Grocery chains that invested early in digital initiatives are seeing the benefits.

Of the banners analyzed, the **25 most Digitally Mature showed an average growth of 2.2x higher** than their competitors.

Note*: The benchmark data set (n = 75) is divided into three segments basis their digital maturity (high, medium and low). The sample (n) falling within each segment is mentioned inside.

Chapter 2

Digital Grocery Maturity: Fundamentals Need an Upgrade.



While grocers have turned on digital shopping, the features and experience are more reminiscent of eCommerce or Cart commerce platforms of the early 2000's vs. a true omnichannel experience. Dropping in a platform is the simple part. Integrating it into the business is where the challenge comes. The data and process integration (product, customer, delivery) is the missing link that will upgrade the entire experience. Grocers have realized ~15.8% incremental sales a result of turning on online delivery, but that revenue has come at negative to neutral margins. On the operations side, grocers have to calibrate their online ordering options and fulfillment methods by considering both the margin-per-order and the average in-store attachment rate.

<18% of grocers provide inventory status in a cart

47% of grocers allow a one click checkout from the cart

Benchmark Categories & Formats Benchmarked.

Online Grocery Customer Journey

Research and discovery

Ease of ordering

Fulfillment

Customer engagement and service

Formats Benchmarked

Supermarkets

These are large shopping stores that stock thousands of SKUs across, grocery, general merchandise and in some cases pharmacy products. They offer better availability of a product by pack sizes and by brands, hence increasing the types of a specific product available on shelf.

Hypermarkets

These are large format stores with multiple departments (much larger than a typical supermarket). They are a combination of a department store and a grocery supermarket. Usually, hypermarkets sell products across categories such as electronics or apparel in addition to grocery.

Discount store

Stores that sell products at a lower price (discounts) compared to a traditional ones offering the same product category. There are typically lower SKU counts and less variety. In addition, these stores will stock more 'off-brand' product vs national brands.

Warehouse club

These tend to be no-frills wholesale and retail stores that are membership based and typically sell product in bulk quantities at wholesale prices. This format is an attractive option to both large families and small business owners.

Research and Discovery

Product discovery and research is typically the first step in the shopper buying journey. It is defined as a shopper visiting a site to look for products they know and/or discover new products. The analysis evaluated 25+ attributes covering areas such as Search, Navigation and Reviews.

Global Leaders in Discovery.

Discovery	Company	Region	Primary Format
1	Target	North America	Hypermarket
2	Auchan	Europe	Hypermarket
3 - 5	BJ's	North America	Warehouse Club
	Wegmans	North America	Supermarket
	H-E-B	North America	Supermarket

97%

don't allow the ability to filter / hide unavailable products after searching.

63%

don't offer four or more attributes to filter items on the listing page.

57%

don't offer capability to search within a product category,

50%+

of European grocers display discounts and clearance as a section in primary menu bar in contrast to only **a quarter** of US grocers.

Prioritization of Feature-Functionalities by Grocers.

Table-Stakes

1. **Search:** Auto-complete
2. **Search:** Search in a category
3. **Listing Page:** Add-to-cart functionality

Differentiating Capabilities

1. **Search:** Images in search results
2. **Search:** Hide / show unavailable products
3. **Listing:** Inventory and promotion callouts
4. **Ratings & Reviews:** UGC integrated in product detail

Why This Matters

Product discovery and research sits at the top of shopper funnel, and serve as the foundation of the first impression a shopper gets of a grocer's website. The margin for error is low. A delayed or irrelevant search result, less than credible product details, clunky and unfamiliar navigation are all recipes for losing shoppers even before they've begun a cart.

The analysis found that while basic (out of the box) features were turned on in most sites, the underlying aspects that make them work (richness of content, integration with UGC, use of images, efficacy of search) is far less mature than in other retail segments.

Tearaway

If Grocers need to get one thing right, it's Search. It's the primary mode of product discovery. The speed, flexibility and relevance of search goes a long way to ensuring satisfaction.

Getting this right isn't just a technology issue, it goes far deeper. Strategies must be put into place around how content is setup, how it is categorized, the taxonomy of terms, the integration of multimedia content and key work linkage. These foundational elements form the basis of greater result relevancy and recommendations. Too many grocers are still using tools that are suggesting more toilet paper to someone who just bought toilet paper!

Ease of Ordering

Ease of ordering covers the entire shopper checkout experience and benchmarks the level of friction in the buying / purchase process. The analysis evaluated 30+ attributes covering areas such as Add to Cart, Checkout and Payment.

Global Leaders in Ease of Ordering.

Ease of Ordering	Company	Region	Primary Format
1	BJ's	North America	Warehouse Club
	Carrefour	Europe	Hypermarket
3	Kroger	North America	Supermarket
4	LeShop.ch	Europe	Supermarket
5	Target	North America	Hypermarket
	Costco Wholesale	North America	Warehouse Club
	SPAR	Europe	Supermarket
	ah	Europe	Supermarket

>50%

offer capability to add a personalized note for the order pickers.

81%

do not offer Guest checkout (e.g. Shoppers must be registered and signed in).

>80%

do not offer capability to place orders more than 5 days in advance.

82%

Offer order-ahead functionality. Most accept orders for ‘frozen food / meat and seafood’ and ‘fresh food.

Prioritization of Feature-Functionalities by Grocers.

Table-Stakes

1. **Order:** Enabling online ordering across fresh food, meat and prepared meals.
2. **Order:** Save and use reorder list(s)
3. **Payment:** Card, Gift Cards, Loyalty Points
4. **Delivery Options:** BOPIS / click-and-collect. Schedule home / curbside delivery

Differentiating Capabilities

1. **Cart:** 'Real-time; inventory status in-cart
2. **Cart:** Check gift card balance in cart
3. **Recommend:** Product subscriptions
4. **Recommend:** Available coupons in cart
5. **Delivery:** Schedule orders >5 days ahead

Why This Matters

Nothing stings more than abandoned carts. To have shoppers browse. and build carts only to abandon them at checkout is a telling sign that your ordering process is broken. Best in class retailers across formats convert over 75%+ of shoppers that start a cart with them while the median retailers converts just over 50%.

Grocers must be given credit for implementing online ordering that includes most of the categories they serve, including prepared meals and deli. However the add-to-cart and checkout process (steps and navigation) needs an upgrade to reduce points of friction that drive abandonment. Grocers that are providing tools to show product attributes unique to grocery (e.g. ripeness), and allowing the use of different tender types (i.e Loyalty points, gift cards, offers) are performing far better in reducing the customer churn from cart to checkout.

Tearaway

For Grocers there are two areas of focus that will drive better performance. The first is improving the efficiency of checkout, by upgrading add to cart capabilities and reducing the steps required for checkout (one-click, biometric assisted). The second is focused on increasing the cart size, integrating with elements like inventory, loyalty points, gift cards can drive urgency of purchase and product cross-sells.

Fulfillment

Order Fulfillment covers the entire order fulfillment process for pick up or delivery. The analysis evaluated 30+ attributes covering areas such as Shipping, Home Delivery and BOPIS / Curbside Pickup.

Global Leaders in Fulfillment.

Fulfillment	Company	Region	Primary Format
1	BJ's	North America	Warehouse Club
2	ah	Europe	Supermarket
3	Walmart	North America	Hypermarket
4	HyVee	North America	Supermarket
5	FAMILY FARE SUPERMARKETS	North America	Supermarket

>60%

of the US grocers and **more than 80%** of European grocers do not offer membership delivery programs like Amazon Prime.

>90%

that offer online order-ahead capability also offer home / curbside delivery.

60%

do not allow customers to return online orders by walking into a store.

>50%

US grocers enable digital coupons to be redeemed in store in contrast to only **21%** of European grocers.

Prioritization of Feature-Functionalities by Grocers.

Table-Stakes

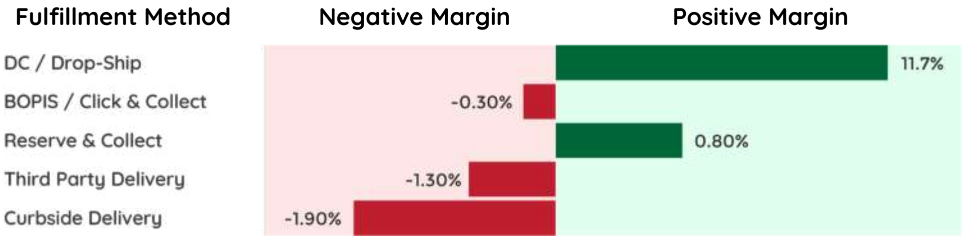
1. **Order Status:** End to end visibility
2. **Alerts:** Notifications via text / email
3. Home delivery of "frozen food / meat and seafood", "fresh food, dairy and egg", and "prepared meals and deli"

Differentiating Capabilities

1. **Alerts:** Send notification to store – 'on my way' , 'reached the store'
2. Membership / special programs for delivery
3. **Delivery:** Two-hour or less
4. Trained pickers for fresh product

Why This Matters

While online ordering is driving net-new top line growth, it comes at the cost of profitability in an already low-margin industry. Per-order margins vary significantly based on fulfillment type. Other than fulfilling from distribution centers or vendor drop-ship, all other forms of online order fulfillment are margin neutral or negative. 3 in 5 grocers reported that profit per order has worsened since offering online delivery. Grocers need to improve their order fulfillment (pick, pack, preserve or deliver) processes to improve profitability and create a seamless pickup or delivery experience for the shopper.



Tearaway

Immediate takeaways for this section are the hardest because there are no real shortcuts or quick fixes to improve margin-per-order and average in-store attachment rate. We recommend a customer lifetime / order cycle analysis to understand the incremental impact of online / digital ordering and identify points to drive attachment. On the execution side, improvement of the in-store order pick-up process (fixtures, area in store, training, digital cues) can be a quick win. However, the grocer must have process and labor efficiency as part of their D.N.A.

Customer Engagement and Service

Customer engagement and service analyzes the grocers ability to effectively personalize, engage and help the shopper across all phases of the buying process. The analysis evaluated 30+ attributes covering areas such as Profile and Preference Management, Personalization, Loyalty Programs and Help.

Global Leaders in Customer Engagement.

Customer Engagement	Company	Region	Primary Format
1	LeShop.ch	Europe	Supermarket
2	ah	Europe	Supermarket
	Carrefour	Europe	Hypermarket
	Auchan	Europe	Hypermarket
5	BJ's	North America	Warehouse Club

>90%

have not deployed capability to send cart-abandonment emails within 48 hours to trigger a purchase.

82%

offer weekly ads in contrast to only **19%** of European grocers.

>70%

do not offer real-time customer service options like chat.

73%

offer capability to make shopping lists.

Prioritization of Feature-Functionalities by Grocers.

Table-Stakes

1. Store information and locator
2. Communication Preferences: eMail / text notification
3. Customer Care: Phone and email
4. Order history

Differentiating Capabilities

1. Customer Care: Live chat and assistance
2. Profile Management: Household profiles, Social Media
3. Personalization Preferences:
4. Loyalty Program: Third-party integration

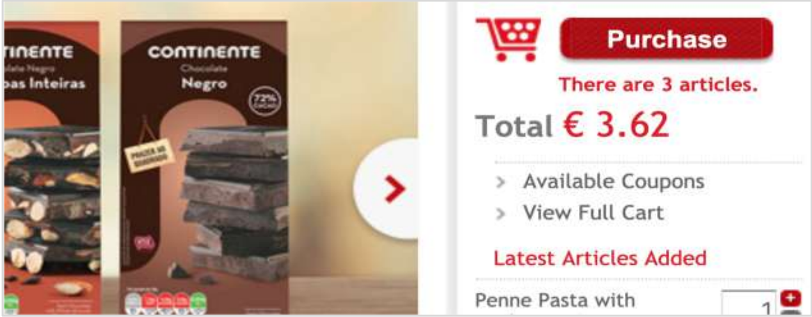
Why This Matters

More than 63% of shoppers interact with their grocer digitally, and weekly grocery shopping trips are on average just 1.6 visits. Grocers need to promptly acknowledge, and effectively answer shopper queries within a short time period across all digital platform, this is a key NPS and brand perception driver. Most grocers are doing the basics - providing accurate and easily accessible information and FAQs, making it easy for shoppers to edit their communication preferences and expanding customer services to support phone, eMail and Social. The next level of maturity is for grocers to expand and enrich the customer / household profile to drive personalization across channels of commerce and engagement.

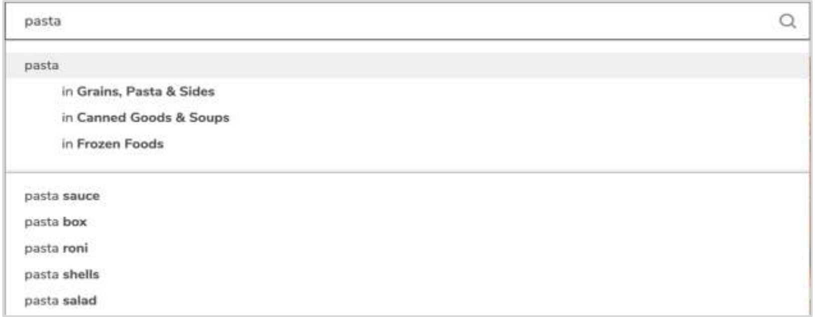
Tearaway

Providing live chat is a clear and simple opportunity for grocers to improve their customer service and conversion. Not only does it help in quickly addressing queries, it also helps convert carts that could be possibly abandoned. In the medium term, grocers should be implementing tools that allow for a deeper customer profile to drive personalization and recommendations.

Best In Class Feature Snapshots.

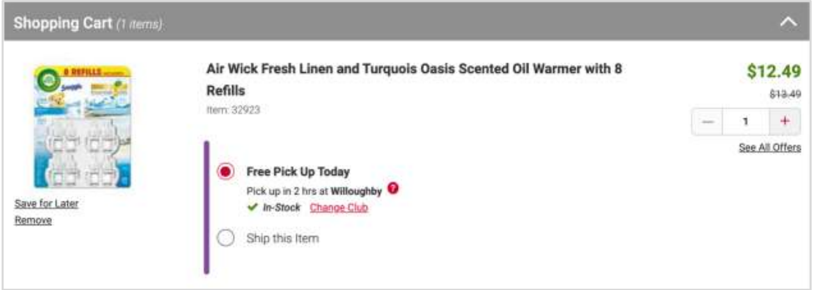


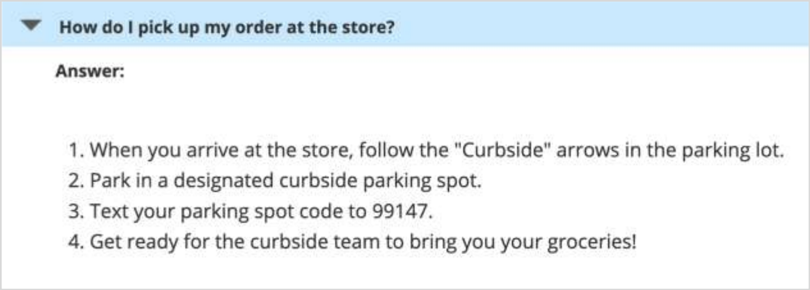
Grocer: Continente
Region: Europe
Analysis Area: Ease of Ordering
Use-Case (What does this image show): Continente displays available coupons in cart view, hence encouraging customers to move further in the checkout process.



Grocer: Albertsons
Region: North America
Analysis Area: Research and Discovery
Use-Case (What does this image show): Albertsons allows users to perform keyword search within a relevant product category.

Best In Class Feature Snapshots.





Grocer: BJ's Wholesale Club
Region: North America
Analysis Area: Ease of Ordering
Use-Case (What does this image show): BJ's displays real-time inventory status on the cart page, hence keeping customers updated.

Grocer: H-E-B Grocery
Region: North America
Analysis Area: Fulfillment
Use-Case (What does this image show): H-E-B offers the functionality to its pickup customers to send an arrival update to the store upon reaching.

Best In Class Feature Snapshots.

Grocer: COOP Switzerland
Region: Europe
Analysis Area: Customer Engagement
Use-Case (What does this image show): COOP offers free sample of its products to customers, giving them reason to take a product-trial and return to make a purchase.

Grocer: Morrison Supermarkets
Region: Europe
Analysis Area: Fulfillment
Use-Case (What does this image show): Morrison offers a paid membership plan designed specifically for loyal customers to avail lower priced delivery charges.

Sponsor Q&A

What Does the Future of Digital Commerce Look Like?

Mark Fairhurst

Senior Director of Marketing

Mercatus

While many innovators obsess over new products, the big winners that are emerging are rallying around customer demand for discovery and convenience. In an increasingly time-starved world, the modern shopper insists, “Help me find what I’m looking for when I need it, at a great price, at my convenience.” Moving forward in digital commerce, we will see grocers adopt integrative solutions that enable them to cater to shoppers’ changing buying habits. This includes selling non-food related items or food adjacent items alongside their current online grocery assortment.

The recent clarification of Amazon’s grocery roadmap will also push some retailers into discovering more frictionless solutions inside the grocery store, such as self-checkout kiosks or mobile checkout. Additionally, grocers will start to tip the scales back in their favor by reducing their dependency on third-party marketplace providers for pickup and delivery services. In taking back control of their online marketing, grocery retailers will be able to offer more authentic shopping experiences to their valued customers.

Ian Vaishman

Senior Digital Marketing Manager

Dosh

With in-store sales still accounting for 90% of all retail sales and U.S. consumers spending more than $3.1 trillion in offline sales last year, the real need of advertising innovation is centered around better capturing in-store activity. Digital advertising will focus on new solutions like card-linked offers or CLOs that can deliver proven return on advertising spend (ROAS) and direct ties to transactions. CLOs incentivize consumers to make a purchase - through a linked credit or debit card - in return for rewards and cash back offerings. These solutions allow brands to tie their ad campaigns to physical store transactions through the use of mobile - the one device that seamlessly connects the online to offline shopping journey.

Sponsor Q&A

How are You Helping Food Retailers Compete and Drive Consumer Loyalty?

Mark Fairhurst
Senior Director of Marketing
Mercatus

To help retailers drive loyalty, Mercatus offers AisleOne ™ , a personalization intelligence engine that can quickly and easily integrate into retailers' marketing emails, apps and online shopping websites. This automated marketing tool can serve up relevant content to customers on a 1-to-1basis with no added work needed by the retailer. AisleOne solves the problem of information overload during an online shopping experience by automatically curating relevant content and offers for each individual customer. Proven user flows helps shoppers build their carts easily and efficiently, maximizing opportunities for customers to shop for items over and above their standard household list.

With Mercatus, retailers have control over their digital grocery offering and can build a seamless, unified shopping experience in order to retain and gain customer loyalty. Mercatus enables grocery retailers to own the shopper journey while maintaining and building customer relationships. Mercatus' personalized offers and recommendations can make shoppers feel that their local store truly understands them, helping to build brand loyalty and trust. Most importantly, grocers can use these strategies to maintain shopper data, while constantly improving personalized shopping experiences for their customers.

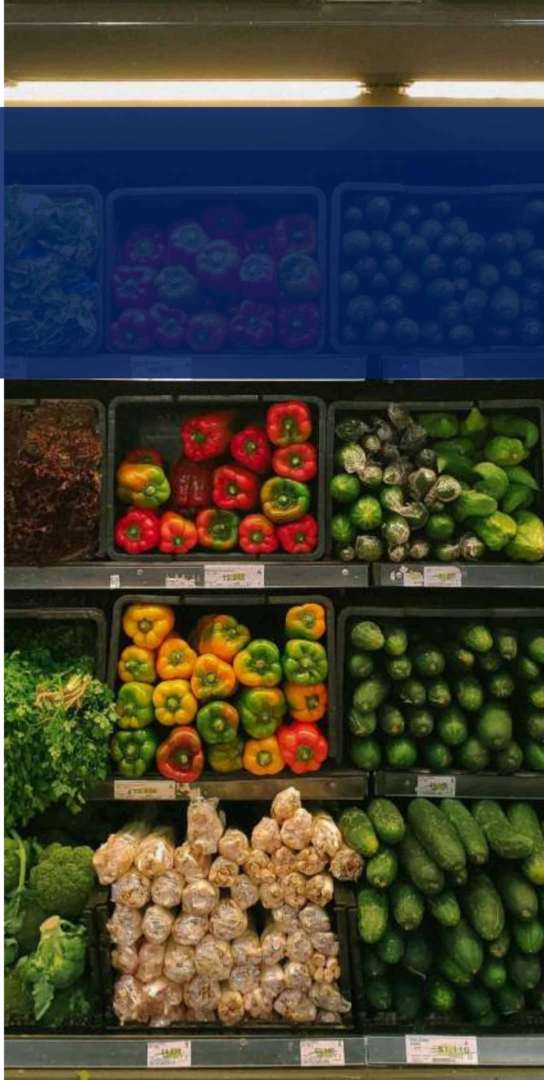
Ian Vaishman
Senior Digital Marketing Manager
Dosh

Over the last few years, competition between major grocery brands and nontraditional food retailers have been growing. Amazon's acquisition of Whole Foods has signaled a new era for the modern grocery store: one where online and offline seamlessly revolve around nutrition-conscious (along with growing demands for organic, locally sourced produce) and digital-savvy shoppers. While these changes have brought better experiences for consumers, traditional grocery chains relying on old distribution and engagement models have been forced to examine innovative marketing channels and tools to drive in-store transactions and brand relevance.

As the fastest growing card-linked offer platform and growing mobile advertising channel, Dosh appeals to our food retailer partners who are keen on achieving lift in total in-store spend, frequency, and drive loyalty behavior from mobile-centric shoppers. In addition, the pay-for-performance model with card-linked offers presents a low-risk opportunity for partner brands. To measure campaign performance, Dosh compares the transaction behavior against control groups during various periods of the campaigns. Historical transaction data is also used to measure how shoppers transact at our partners before and after joining Dosh. Recently, Dosh generated 132% in sales lift for a food retailer during the campaign period not only driving incremental in-store traffic, but also increasing customer loyalty.

Chapter 3

Digital Maturity Leaderboard.



The US and European Grocery Business: By the Numbers.

While it is up for interpretation which of the areas of the digital journey is most important to a grocer's business, the fact is that Research & Discovery, Ease of Ordering, Fulfillment, and Customer Engagement are critical in today's environment. While not every format requires the same level of digital functionality (e.g. deep discounters), grocers need to know the expectations of their core shoppers and implement tools accordingly. One thing is for sure, the migration to digital is not going to slow down amongst shoppers. The current leaders are already showing that digital leads to better financial performance so the laggards need to wake up and put strategies in place - before it's too late.

Digital Maturity Leaderboard.

Top Quartile
Second Quartile
Third Quartile
Bottom Quartile

2019 Rank	Banner	Revenue (US$ Bn)	Holding Company	Region	Primary Format	Discovery	Ordering	Fulfillment	Service
1	BJ's	$ 12.76	BJ's Wholesale Club	North America	Warehouse Club	3	1	1	5
2	Carrefour	$ 98.12	Carrefour	Europe	Hypermarket	20	1	7	2
3	Auchan	$ 95.99	Auchan	Europe	Hypermarket	2	10	15	2
4	Leshop	$ 29.06	Migros	Europe	Supermarket	13	4	19	1
5	Albert Heijn	$ 72.56	Ahold Delhaize	Europe	Supermarket	27	5	2	2
6	Target	$ 71.88	Target	North America	Hypermarket	1	5	17	32
7	Kroger	$ 121.16	Kroger	North America	Supermarket	20	3	11	16
8	Rewe	$ 70.69	Rewe	Europe	Supermarket	8	10	14	6
9	Costco	$ 141.58	Costco	North America	Warehouse Club	3	5	33	6
10	Walmart	$ 500.34	Walmart	North America	Hypermarket	13	19	3	11
11	Monoprix	$ 42.29	Casino	Europe	Hypermarket	22	5	21	6
12	Wegmans	$ 8.9	Wegmans Food Market	North America	Supermarket	3	19	8	23
13	SPAR	$ 39.86	Spar Holding	Europe	Supermarket	22	5	9	32
14	Hy Vee	$ 9.5	Hy-Vee	North America	Supermarket	34	24	4	11
15	H-E-B	$ 23.94	H-E-B Grocery	North America	Supermarket	3	24	20	32
16	Eroski	$ 6.85	Eroski	Europe	Supermarket	8	24	32	32
17	Coop at Home	$ 21.94	Coop	Europe	Supermarket	8	39	34	16
18	Cub Foods	$ 5.21	SuperValu	North America	Supermarket	34	32	12	16
19	Waitrose	$ 14.31	John Lewis Partnership PLC	Europe	Supermarket	13	32	16	46
20	Sainsbury	$ 41.15	Sainsbury	Europe	Hypermarket	13	53	23	23

Digital Maturity Leaderboard.

Top Quartile
Second Quartile
Third Quartile
Bottom Quartile

2019 Rank	Banner	Revenue (US$ Bn)	Holding Company	Region	Primary Format	Discovery	Ordering	Fulfillment	Service
21	Albertsons	$ 60.5	Albertsons	North America	Supermarket	34	19	24	23
22	Safeway	$ 60.5	Albertsons	North America	Supermarket	44	15	18	46
23	ShopRite	$ 16.54	Wakefern Food Corp.	North America	Supermarket	34	17	41	23
24	SuperValu	$ 4.51	Musgrave Group	Europe	Supermarket	27	24	48	6
24	Market Basket	$ 5	Demoulas Super Markets	North America	Supermarket	27	24	48	6
26	Metro	$ 42.21	Metro	Europe	Hypermarket	22	10	34	62
27	Family Fare	$ 8.06	Spartan Nash	North America	Supermarket	34	39	5	39
28	Edeka	$ 61.93	Edeka	Europe	Supermarket	44	14	45	32
29	Intermarche	$ 48.07	ITM Intermarche	Europe	Supermarket	56	39	6	32
30	Tesco	$ 64.75	Tesco	Europe	Hypermarket	13	39	30	46
31	Leclerc	$ 43.62	Leclerc	Europe	Hypermarket	27	10	65	16
32	Coop.dk MAD	$ 6.96	Coop Danmark A/S	Europe	Supermarket	34	15	52	32
33	Meijer	$ 17.4	Meijer	North America	Hypermarket	44	24	36	23
33	Iceland Foods	$ 3.84	Iceland	Europe	Supermarket	13	39	36	46
35	Schnuks	$ 3	Schnuks Super Markets	North America	Supermarket	62	18	13	46
36	Coop UK	$ 12.95	Coop UK	Europe	Supermarket	62	23	36	11
37	DIA	$ 8.42	Dia S.A.	Europe	Discount Store	8	57	59	16
37	Coop Sweden	$ 7.21	Coop Sverige AB	Europe	Supermarket	44	32	44	16
39	Sprouts Farmer Markets	$ 12.02	Sprouts Farmers Market	North America	Supermarket	56	51	10	39
40	Loblaw	$ 34.65	Loblaw Companies Ltd.	North America	Hypermarket	34	51	39	23
41	Prisma	$ 13.31	S Group	Europe	Supermarket	22	19	50	56

Digital Maturity Leaderboard.

Top Quartile | Second Quartile | Third Quartile | Bottom Quartile

2019 Rank	Banner	Revenue (US$ Bn)	Holding Company	Region	Primary Format	Discovery	Ordering	Fulfillment	Service
42	Save Mart	$ 4.5	Save Mart Companies	North America	Supermarket	58	39	25	23
43	Giant Eagle	$ 9.2	Giant Eagle	North America	Supermarket	70	32	27	11
44	ICA	$ 12.95	ICA Gruppen AB	Europe	Supermarket	27	39	52	23
45	Aldi	$ 110.89	Aldi	North America	Discount Store	44	39	22	56
46	Publix	$ 36.4	Publix Super Markets	North America	Supermarket	34	30	30	62
47	Continente Modelo	$ 6.88	Sonae	Europe	Supermarket	27	39	47	39
48	Hyper U	$ 23.04	Systeme U	Europe	Supermarket	27	53	54	23
49	Pricechopper	$ 3.7	Price Chopper	North America	Supermarket	34	38	42	46
50	Morrisons	$ 22.47	Wm Morrison	Europe	Supermarket	22	53	42	56
51	Esselunga	$ 9.14	Esselunga S.p.A	Europe	Supermarket	34	53	62	16
52	Whole Foods	$ 232.89	Amazon	North America	Supermarket	44	32	26	65
53	Coop Italia	$ 16.68	Coop Italia	Europe	Supermarket	44	30	28	68
54	Ocado	$ 2.03	Ocado	Europe	Supermarket	8	65	60	39
55	Dollar General	$ 25.6	Dollar General	North America	Supermarket	3	60	64	46
55	BigLots	$ 5.24	Big Lots	North America	Supermarket	13	60	66	11
57	Willys	$ 5.42	Axfood	Europe	Discount Store	44	32	54	46
58	Kesko	$ 4.74	Kesko Corporation	Europe	Supermarket	44	39	51	46
59	Jumbo	$ 8.56	Jumbo Group	Europe	Supermarket	44	39	46	65
60	Winn Dixie	$ 51.39	Southeastern Grocers	North America	Supermarket	58	60	29	56
61	Konzum	$ 12.66	Agrokor d.d	Europe	Supermarket	58	57	40	62
62	Sobeys	$ 17.97	Empire Company Ltd.	North America	Supermarket	62	57	63	46

Digital Maturity Leaderboard.

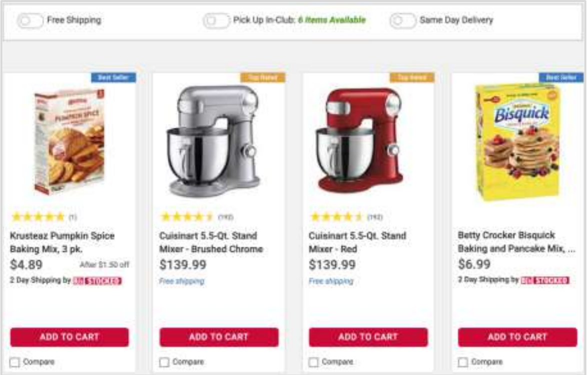
Top Quartile
Second Quartile
Third Quartile
Bottom Quartile

2019 Rank	Banner	Revenue (US$ Bn)	Holding Company	Region	Primary Format	Discovery	Ordering	Fulfillment	Service
63	Shop and Stop	$ 72.56	Ahold Delhaize	North America	Supermarket	70	60	56	39
63	Giant Food	$ 72.56	Ahold Delhaize	North America	Supermarket	70	60	56	39
65	Lidl	$ 120.51	Schwarz Group	Europe	Discount Store	58	39	61	71
66	Mercadona	$ 28.08	Mercadona, S.A.	Europe	Supermarket	75	67	56	39
67	Winco	$ 7.02	WinCo Foods	North America	Supermarket	44	67	67	56
68	Makro	$ 23.19	SHV Holdings N.V.	Europe	Warehouse Club	62	69	72	56
69	Recheio	$ 20.03	Jeronimo Martins SGPS	Europe	Discount Store	62	69	70	69
70	Ingles Markets	$ 4.09	Ingles Markets Inc.	North America	Supermarket	68	66	68	71
71	Globus	$ 7.42	Globus Holding	Europe	Hypermarket	75	69	68	69
72	Stater Bros	$ 4.3	Stater Bros	North America	Supermarket	75	74	71	65
73	REMA 1000	$ 1.87	Reitan Group	Europe	Discount Store	44	72	74	77
74	Coop Mega	$ 5.72	Coop Norge	Europe	Supermarket	70	72	73	71
74	Trader Joe's	$ 110.89	Aldi	North America	Supermarket	62	74	74	71

Leader Profile: BJ's

	BJ's Wholesale
Research and Discovery	• Product comparison tool (Image 1) • Product recommendations in search
Ease of Ordering	• Filter attribute on PLP - products available for pick up in club or same day delivery (Image 1) • Delivery timelines on PDP on basis of the destination zip code
Order Fulfillment	• Less than 2 hours delivery • Notify store for 'reached-the-store' update (Image 2)
Customer Engagement and Service	• Payment card details can be stored • Register for membership program and perform account management (Image 3)

#1



#2

#3

Leader Profile: Carrefour

	Carrefour
Research and Discovery	• Product recommendations in search • Filter to hide / show unavailable products in the search results • Aggregate product ratings available in PLP
Ease of Ordering	• Promotions are displayed in cart (Image 1) • Delivery timelines on PDP on basis of the destination zip code
Order Fulfillment	• Less than 2 hours delivery (Image 2) • Grocery kiosks are available for pickup
Customer Engagement and Service	• Payment card details can be stored (Image 3) • On-demand customer service

#1

#2

#3

The Digital Maturity Benchmark Report (Grocery) is an annual analysis of the digital capabilities of the top global grocers across all phases of the shopper journey.

If you would like more information on the methodology or are interested in obtaining a detailed banner specific benchmarking report that includes analysis and recommendations, please reach out to us at info@incisiv.io.

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