

# Online Grocery Shopping: The Amazon Revolution

Opeepl 2017



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# CONTENTS

**03 Introduction**

**04 General Grocery Shopping Patterns**

**09 Online Grocery Shopping**

**12 Shopping at Amazon**

**20 Grocery Shopping at Amazon**

**24 About the Research**

**25 About Opeepl**

# Introduction



The report is based on the consumer research that Opeepl has conducted in September 2017. The research is based on 1500 respondents in Germany, UK and The Netherlands aged 18-59. In the first part of the survey the respondents were asked to answer questions about their grocery shopping behavior. In the second part of the survey the respondents were asked about their experiences with Amazon webshop.

The aim of the survey was to identify how popular online grocery shopping is in the three countries, what are consumers' attitudes towards Amazon and if they would be willing to buy groceries at Amazon.

## General Grocery Shopping Patterns

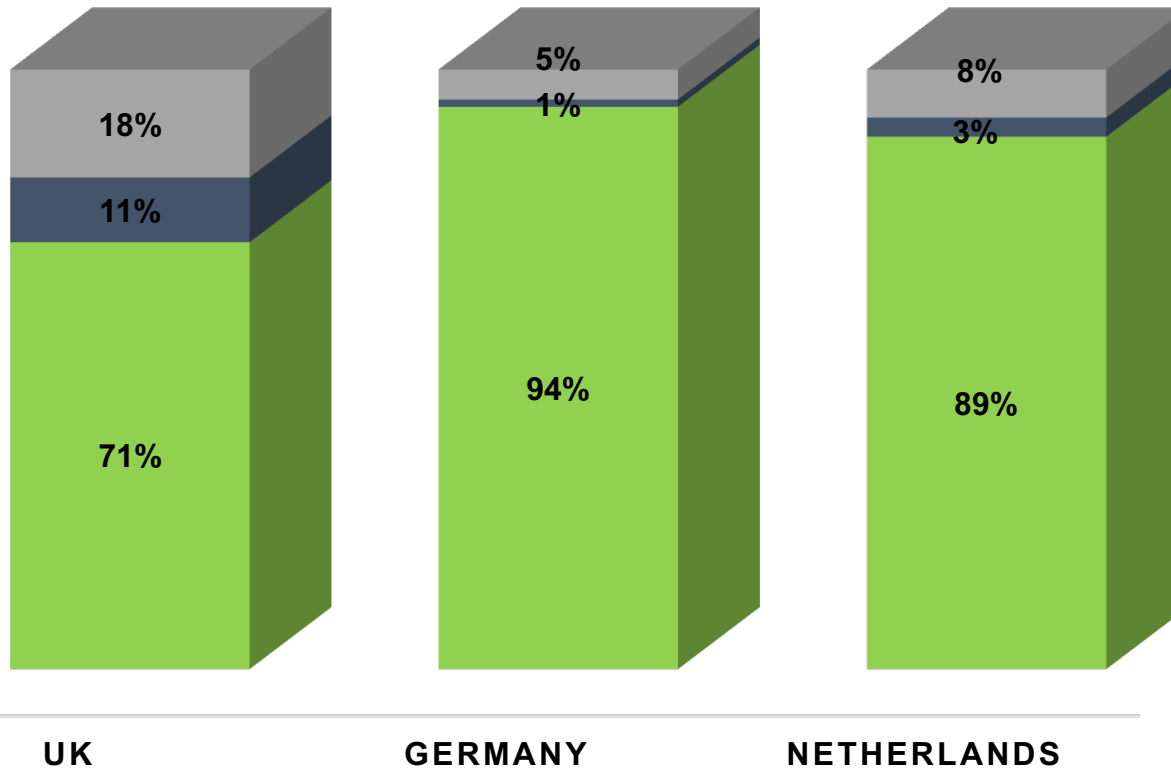


The majority of consumers in UK, Germany and The Netherlands buy their groceries solely at a supermarket (71%, 94% and 89% respectively). Among the three countries, online grocery shopping is most popular in UK and least popular in Germany: 11% of consumers in UK, 1% in Germany and 3% in The Netherlands order their groceries only online, while the rest combine online and offline shopping. Shopping frequency at a supermarket differs across the countries.

# Way of buying groceries

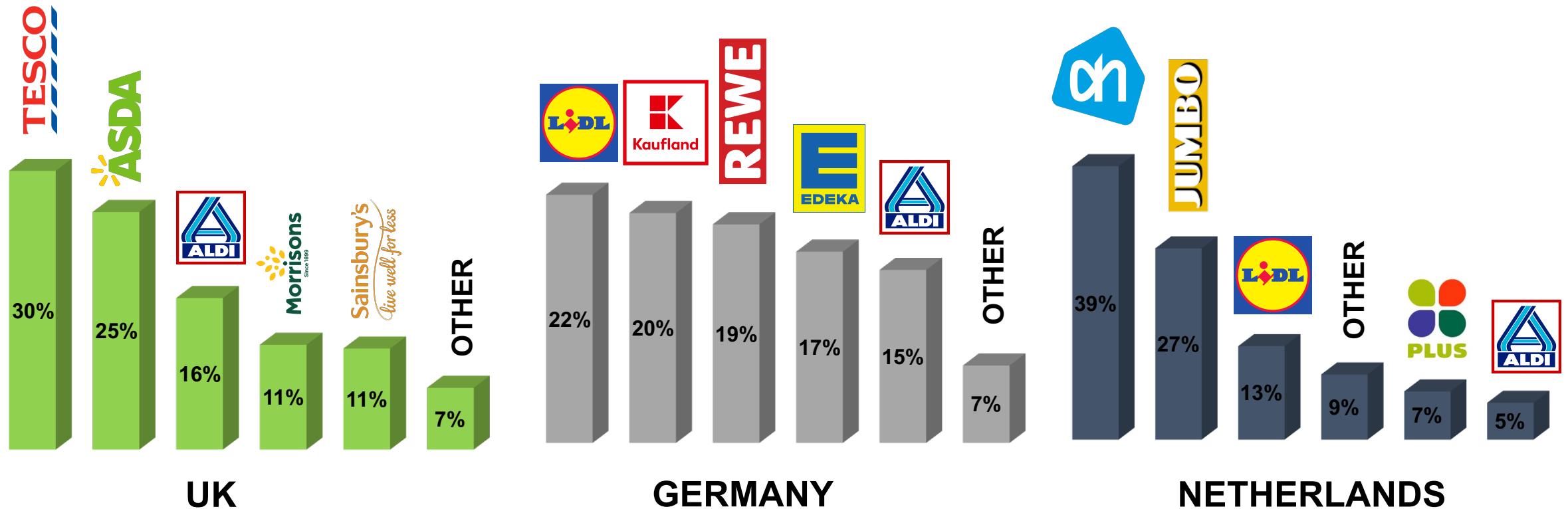
| How do you buy your groceries? |

■ I VISIT A SUPERMARKET ■ I ORDER ONLINE ■ BOTH



# Top supermarkets in UK, Germany and The Netherlands

| Where do you usually buy your groceries? |



## Other popular supermarkets in UK, Germany and Netherlands

| If other: which supermarket do you usually buy your groceries at? |



Waitrose  
Heron  
Walmart

Co-Op

Ocado  
Fultons  
Farmfoods

Lidl

Minute Mart  
Iceland

MA brothers



Baum  
Sky Real  
Netto  
Norma KaDeWe  
Penny  
Tegut Bioladen  
Globus  
Marktkauf



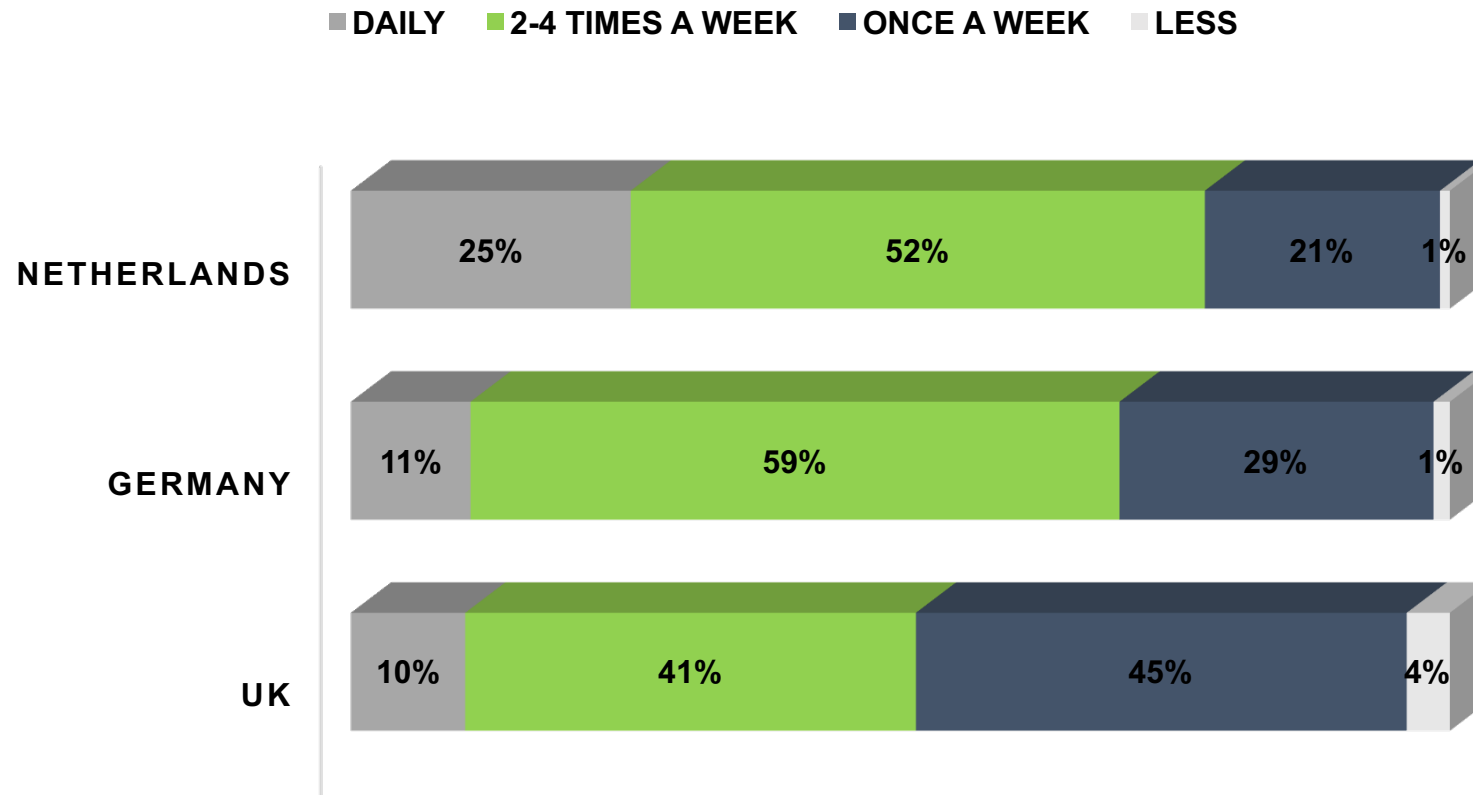
Bas  
Dekamarkt  
Boni AH  
Vomar Poiesz  
Picnic Dirk  
Jan Linders  
Hoogvliet  
BioCoop  
Deen Emte

### Note

The sizes of the words in the word clouds are proportional to the number of respondents who typed them in

# Traditional grocery shoppers: shopping frequency

| How often do you visit your supermarket? |



## Note

Data from the respondents who buy groceries only at a supermarket



## Online Grocery Shopping



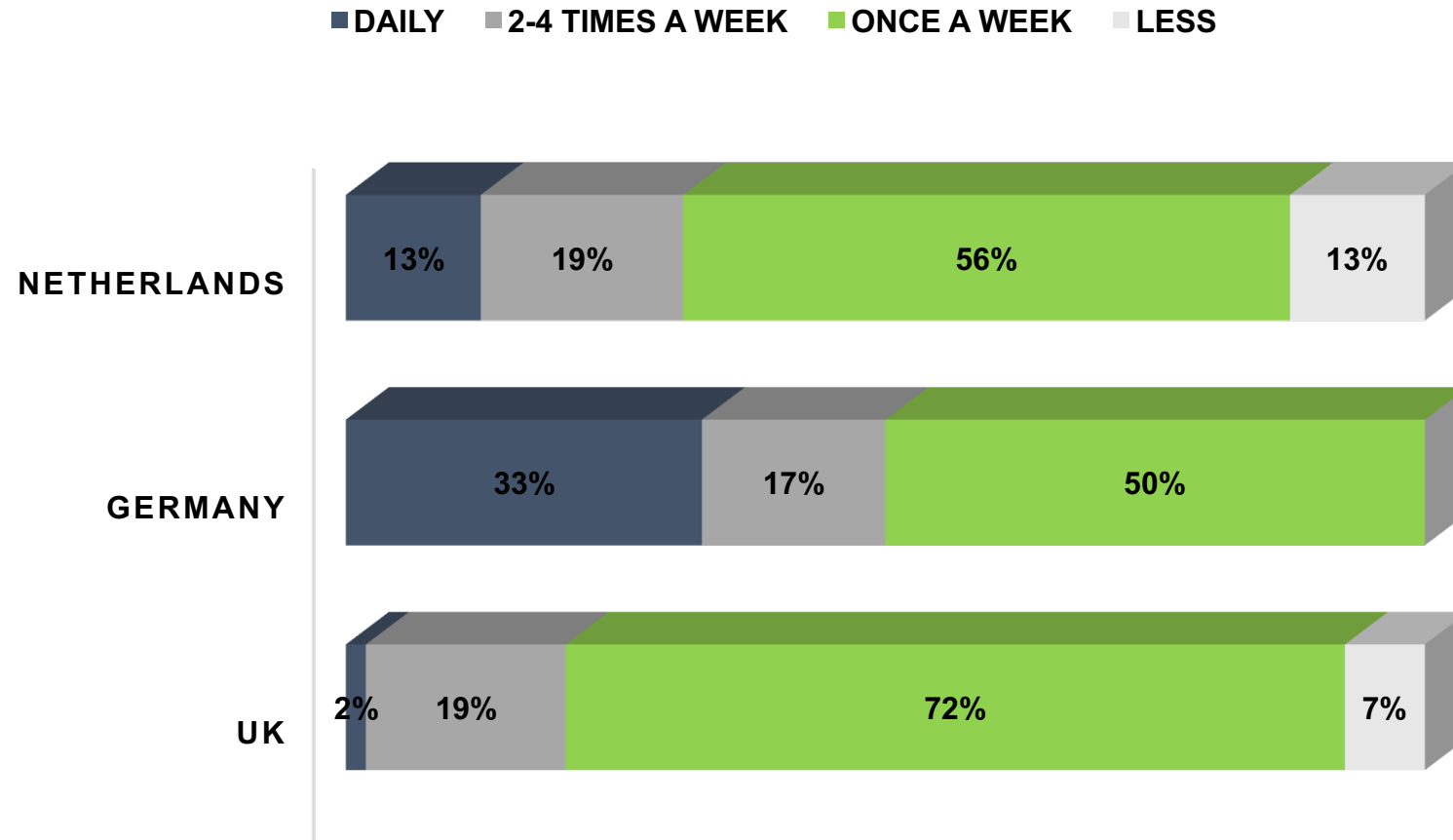
29% of British, 6% of German and 11% of Dutch consumer buy groceries online: either solely online or by combining online shopping with shopping at a supermarket. The majority of consumers who handle only online do that once a week. Amongst hybrid grocery shoppers (consumer who buy groceries both online and a supermarket), the traditional way of shopping at a supermarket is still more popular.

# Online grocery shoppers: shopping frequency

| How often do you buy groceries online? |

## Note

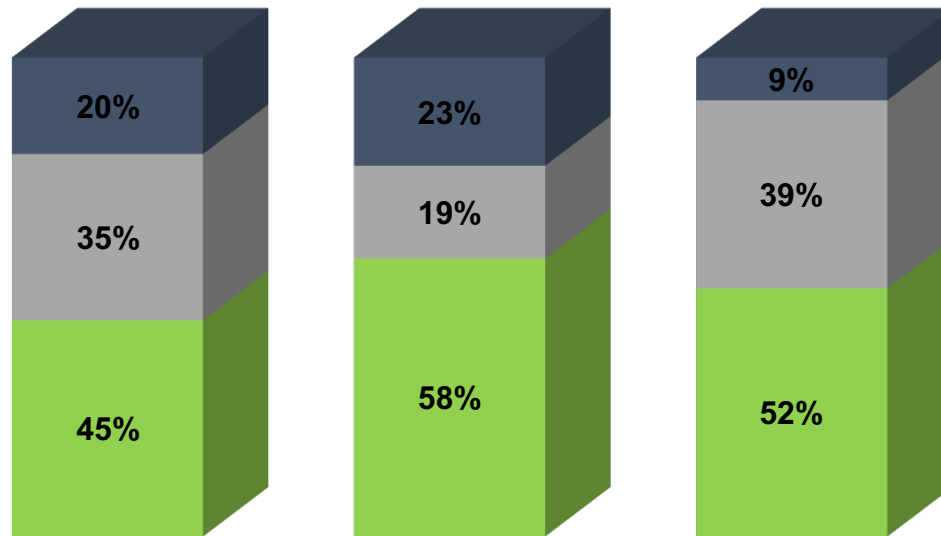
Data from the respondents who only buy groceries online



# Hybrid grocery shoppers: online/offline split

| How do you buy groceries? |

- EVENLY IN THE SUPERMARKET & ONLINE
- MOSTLY ONLINE & SOMETIMES IN THE SUPERMARKET
- MOSTLY IN THE SUPERMARKET & SOMETIMES ONLINE



## Note

Data from the respondents who buy groceries both at a supermarket and online

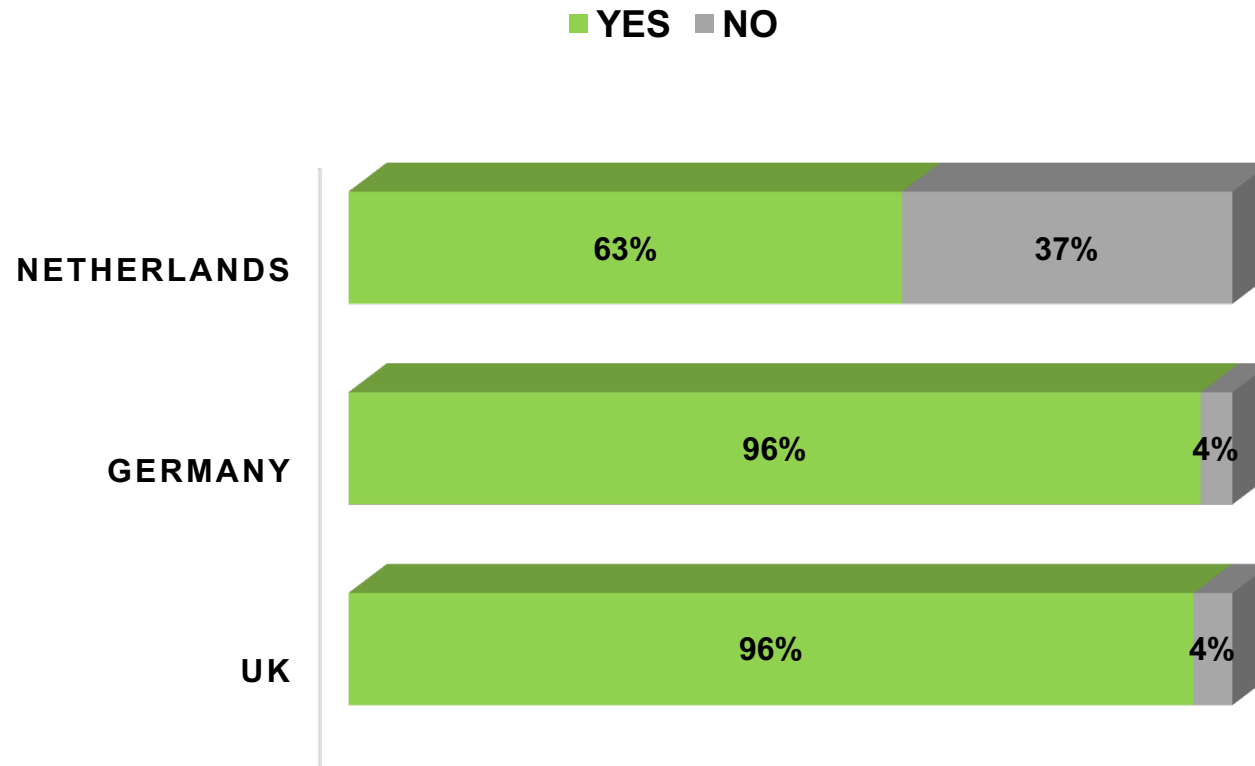
## Shopping at Amazon



Most of the consumers in UK (96%), Germany (96%) and The Netherlands (63%) know Amazon. However, Amazon brand awareness in Netherlands is quite low compared to the other two countries. There are differences among the countries with regard to the products ordered at Amazon. Reasons of using Amazon vary, with the main ones being good value for money and broad assortment. 98% of consumers who engage with Amazon tend to recommend it to others.

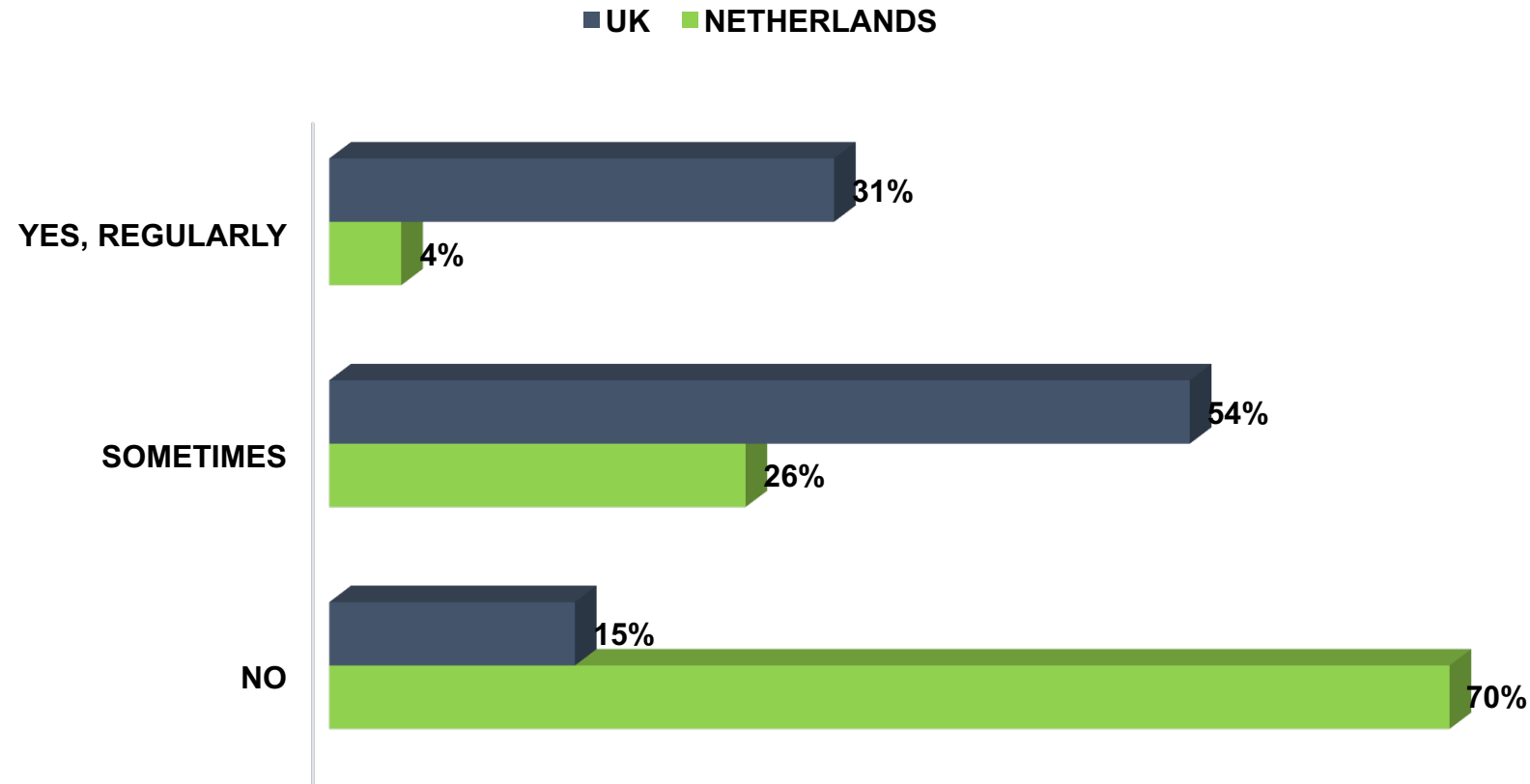
# Amazon brand awareness

| Do you know Amazon? |



# Engagement with Amazon

| Do you order products at Amazon? |



## Note

Data only from UK and The Netherlands

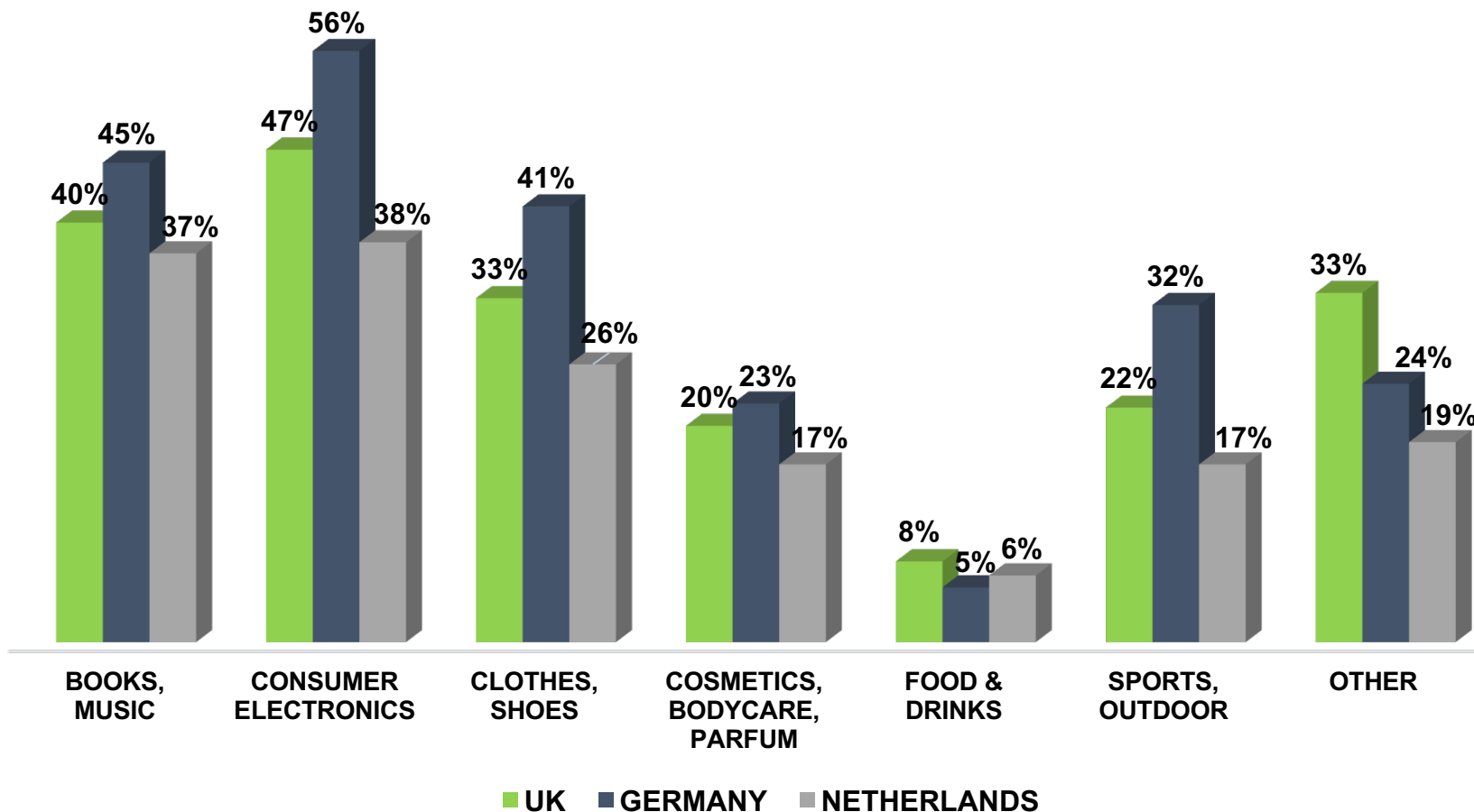
## Note

Data from the respondents who know Amazon

# Type of products bought at Amazon

| What type of products do you order at Amazon? |

**Note**  
Multiple choice question

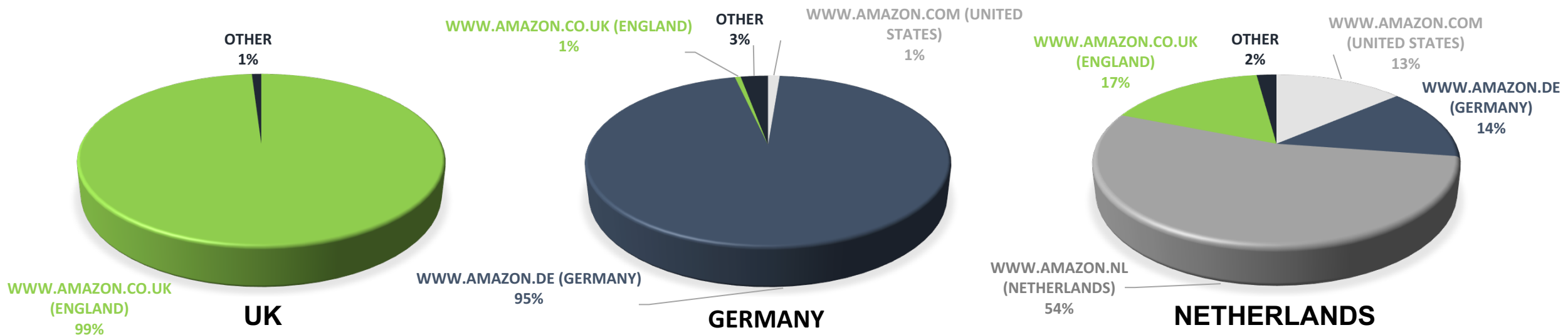


# Amazon websites

| Which website of Amazon do you mostly visit to order products? |

## Note

[www.amazon.nl](http://www.amazon.nl) (Netherlands)  
sells only books



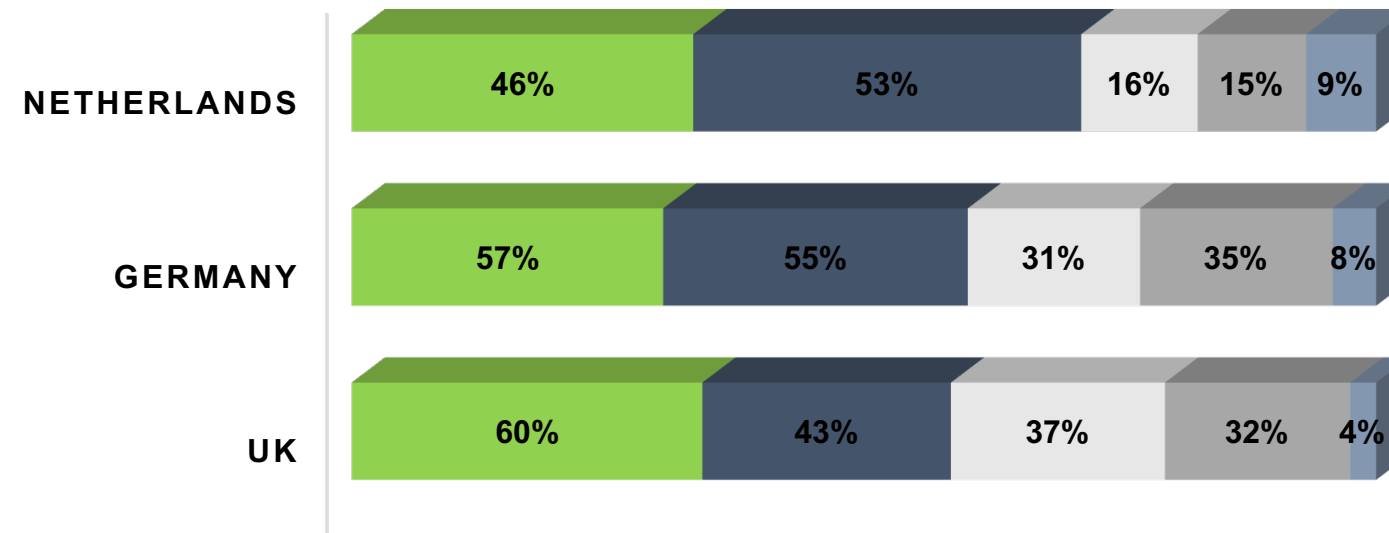


# Reasons of using Amazon

| Why do you buy at Amazon? |

- PRODUCTS ARE CHEAP, DELIVER GOOD VALUE FOR MONEY
- BROAD ASSORTMENT, I CAN ORDER PRODUCTS I CAN'T FIND ELSEWHERE
- GREAT SERVICE
- WEBSITE IS PERFECT FOR SEARCH & ORDER
- OTHER

**Note**  
Multiple choice question



## Other reasons of using Amazon

| What is the main reason for shopping at Amazon? |

Can't always get  
to shops

It's cool and I trust  
them with bank details

Reliable

Amazon prime is  
convenient

It's easy to do so

Next day delivery

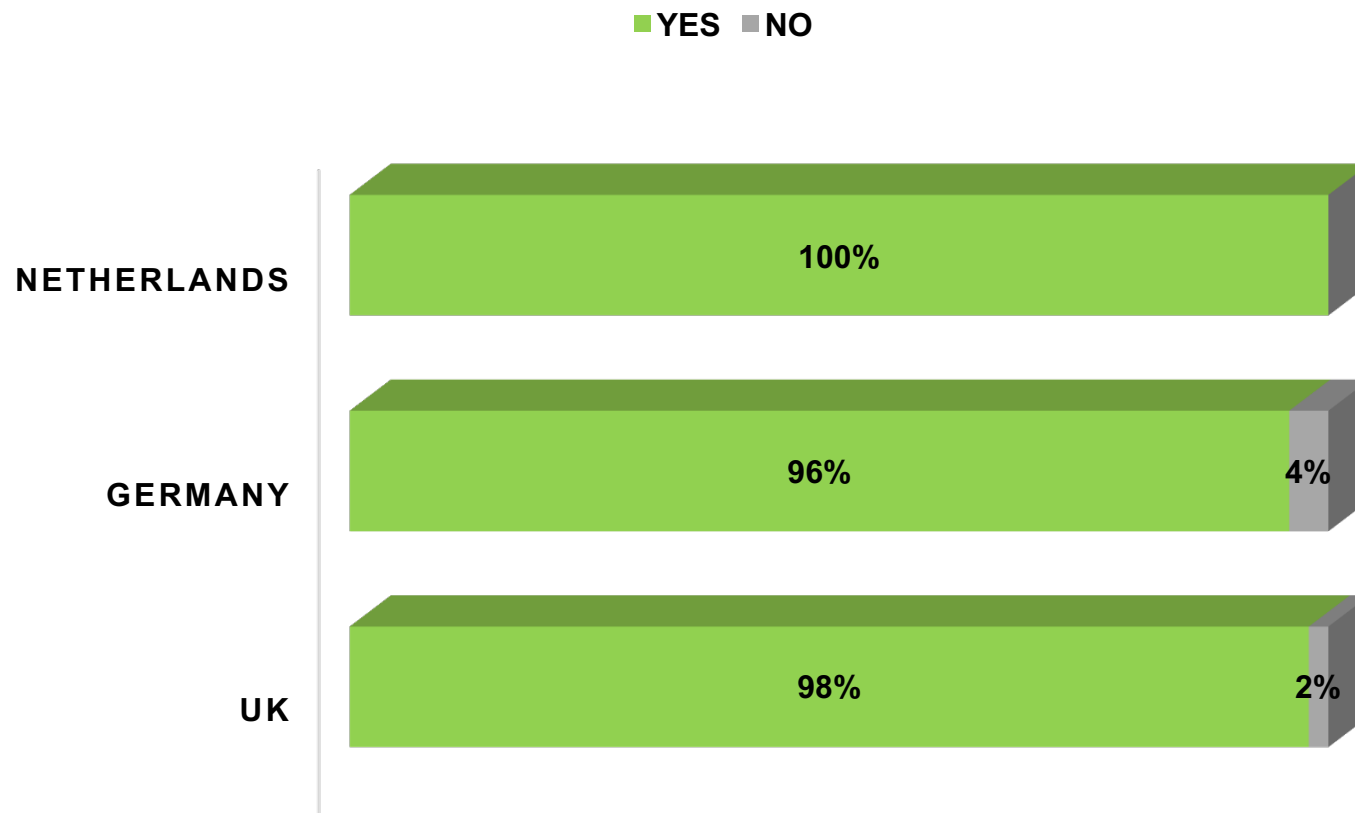
Laziness

### Note

Data from the British  
respondents who chose  
'OTHER' in the previous  
question (page 17)

# Tendency to recommend Amazon to others

| Would you recommend Amazon to your friends and acquaintances? |



## Note

Data from the respondents who order products at Amazon

## Grocery Shopping at Amazon

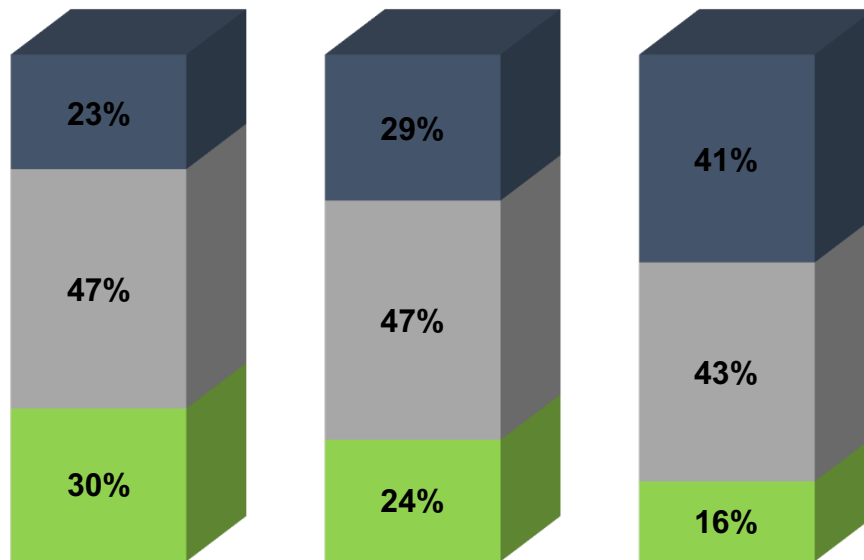


30% of British, 24% of Germans and 16% of Dutch consumers would buy their groceries at Amazon, if such a service was available. The rest (47% of people in UK and Germany and 43% in Netherlands) chose 'maybe' when they were asked if they would do grocery shopping at Amazon, while 23% of British, 29% of Germans and 41% of Dutch consumers would not purchase their groceries at Amazon. The reluctance to buy groceries at Amazon in Netherlands is most probably related to the generally low brand awareness and low usage of Amazon website in the country.

## Grocery shopping at Amazon

| If Amazon (an online webshop) would offer daily delivery of food & groceries to your door would you consider buying at Amazon? |

■ YES ■ MAYBE ■ NO



UK

GERMANY

NETHERLANDS

# Reasons of willing to order groceries at Amazon

| Why would you buy groceries at Amazon? |

It's convenient  
and time saving

Amazon prices tend  
to be cheaper and a  
wider choice of  
items

They are highly  
organised, good  
value and keep you  
informed where  
your items are

They seem to be  
able to deliver  
anything. Therefore  
would trust them to  
deliver food

I am happy with the  
service and price. I  
am sure the food  
would be the same

For ease and Amazon  
has great customer  
service policies

If it could be delivered  
next day without cost  
(prime) it would be so  
helpful for my busy  
lifestyle

## Note

Data only from the British  
respondent who would buy  
groceries at Amazon

# Reasons of not willing to order groceries at Amazon

| Why wouldn't you buy groceries at Amazon? |

I like to examine  
the food  
purchased

Because it could  
not get delivered  
on time

Because they are not  
a supermarket and I  
could not have high  
expectations of the  
quality

Enjoy visiting the  
store

I may not get the  
whole of the  
shopping I require

I like getting my food  
from somewhere I can  
actually check dates and  
I think it's fresher to buy  
from my local  
supermarket

I like to see with my  
own eyes what am  
getting, special fresh  
fruit and veg

## Note

Data only from the British  
respondent who would not  
buy groceries at Amazon

# About the Research

Conducted  
by Opeepl

Dynamic  
sampling  
technology

September  
2017

The research was conducted by Opeepl in September 2017 using dynamic mobile sampling technology.

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|---|---|---|
| <ul style="list-style-type: none"><li>• <b>Country:</b> United Kingdom</li><li>• <b>Number of completes:</b> 500</li><li>• <b>Initiated:</b> 2017-09-05</li><li>• <b>Finished:</b> 2017-09-06</li><li>• <b>Age group:</b> 18 - 59</li><li>• <b>Gender:</b> Male, Female</li></ul> | <ul style="list-style-type: none"><li>• <b>Country :</b> Germany</li><li>• <b>Number of completes:</b> 500</li><li>• <b>Initiated:</b> 2017-09-05</li><li>• <b>Finished:</b> 2017-09-06</li><li>• <b>Age group:</b> 18 - 59</li><li>• <b>Gender:</b> Female, Male</li></ul> | <ul style="list-style-type: none"><li>• <b>Country :</b> Netherlands</li><li>• <b>Number of completes:</b> 500</li><li>• <b>Initiated:</b> 2017-09-05</li><li>• <b>Finished:</b> 2017-09-06</li><li>• <b>Age group:</b> 18 - 59</li><li>• <b>Gender:</b> Female, Male</li></ul> |
|---|---|---|



# About Opeepl



Opeepl is a consumer insights tech company which provides clients with agile and automated insights worldwide. We are working with clients such as Danone, Opera.com and Diageo.

## TRUE GLOBAL REACH



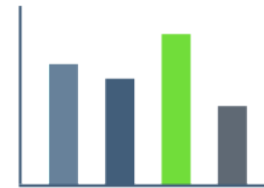
Get insights from consumers everywhere in the world. Our proprietary technology ensures a true global reach.

## MOBILE



Opeepl's respondent interface is 100% mobile and ensures the best possible interaction with the respondent in their natural mobile habitat.

## INSTANT INSIGHTS



Instant delivery and live reporting gives you solid insights in hours increasing your decision velocity.