

Online Grocery Retailing - UK - March 2013

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"Online retailing for multichannel grocers is never likely to yield margins comparable to store-based shopping. But we think retailers can focus marketing communications on higher socio-economic groups to help mitigate the inherent financial disadvantages of retailing online."

– John Mercer, European Retail Analyst

In this report we answer the key questions:

- How big is m-commerce in grocery?
- What is the role of stores in an online future?
- Should Morrisons buy Ocado?
- What services do shoppers want?
- Can online retailing be truly sustainable?

For the leading mid-market grocers, online grocery – along with convenience stores – is one of the few segments for growth, expected to add more than £5.5 billion of annual sales between 2012 and 2017. Yet, even by 2017 that would constitute less than 7% of all grocers' sector sales – reminding us that online grocery remains a niche in a sector that will remain dominated by store-based retailing.

This report examines the sector's growth and prospects in detail, charts the market shares of the leading operators, assesses the performance of the major online grocers and considers the leading issues in the sector. Questions considered by this report include: How big is m-commerce in grocery? What services do shoppers want? What will be the role of the store in an online future? Should Morrisons buy Ocado? And can online grocery retailing be truly financially sustainable?

Our extensive consumer research asks shoppers about their usage of online grocery shopping; where they shop in-store and online; why non-online shoppers are disinclined to buy online; interest in and usage of new-tech channels such as tablets and smart TVs; and interest in and usage of additional services such as in-store collection and same-day delivery options.

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This report is part of a series of reports, produced to provide you with a more holistic view of this market