

# Online Grocery Retailing - UK - March 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact COVID-19 has had on the size and the shape of the online grocery market
- The number of consumers shopping online, and the key shifts in demographics using the channel as a result of COVID-19
- Consumer intentions post-pandemic in their online grocery use
- How groceries are delivered and how this may adapt in light of increased demand
- Key leading retailer metrics, including market shares in 2020
- Satisfaction with the retailer used most often as a result of COVID-19

A record 59% of UK consumers shopped online for groceries in 2020, helping to drive record sales in the channel. The COVID-19 pandemic encouraged (in some cases, forced) new customers to enter the market, with 7% of current online grocery shoppers using online services for the first time. However, most of the uptick in demand came from existing users, with 53% of pre-pandemic online grocery shoppers doing more of their grocery shopping through the channel as a result of COVID-19.

The obvious impact of this uptick in consumer engagement in the online channel has been a rapid acceleration in sales, with all online grocery sales growing by 75.2% in 2020 to reach £22.3 billion and account for a record 11.4% of all grocery sales. The January 2021 lockdown and slow roadmap out of the peak of the pandemic will give further opportunities for the online channel to capitalise, and this prolonged period of heightened demand will leave a legacy impact, with the market expected to be £4.9 billion bigger in 2025 than our pre-pandemic expectations.

The major threat for the channel is that this uptick in usage was purely circumstantial; however, the indications are that most currently utilising online grocery services will remain in the channel, with just 5% saying they will stop shopping online for groceries once the peak of the pandemic has passed. The



"Online grocery was not just the leading growth area in the grocery sector in 2020, but across all of UK retail. A combination of consumer concern and greater in-home food and drink demands served to not only see the channel record growth during the periods of lockdown but throughout the year."

– Nick Carroll, Associate Director of Retail Research

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

## Online Grocery Retailing - UK - March 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



threat to the market leaders is that the legacy boost to the online channel will bring greater interest and new retailers and forms of service into the market, diversifying what it means to trade food and drink online and take a share of spending away from traditional 'big-basket' services.

While a threat to leading players, it is this diversification of missions shopped online which brings the greatest opportunity moving forward. The greater role for businesses like Deliveroo means trading food and drink online is now accessible to all grocery retailers, including convenience, while the pandemic gave a much larger platform to alternative retailers, such as Hello Fresh, and those brands who trade D2C. That will be the legacy of the pandemic – not only opening the channel up to new shoppers but to new services and new thinking about what it means to serve in-home food and drink demand online.

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Products covered in this Report

### EXECUTIVE SUMMARY

- **Impact of COVID-19 on online grocery retailing**

Figure 1: Short, medium and long- term impact of COVID-19 on online grocery retail, 24 March 2021

- **The market**

- **Market size and forecast: online grocery sales grow by 75.2% in 2020...**

Figure 2: All online grocery retail sales, 2015-25 (prepared on 15 March 2021)

- **...driven by record weekly sales and basket sizes**

Figure 3: Store-based online grocery retail sales, average weekly sales, January 2019-January 2021

- **Store-based players react more quickly to heightened demand in the market**

Figure 4: Split of all online grocery sales, by type of retailer, 2015-25

- **Circumstances lay the groundwork for diversification in the makeup of the channel**

Figure 5: Estimated composition of the online grocery sector by type of service, 2018-20

- **The pandemic will leave the market forever inflated**

Figure 6: All online grocery sales as a proportion of all grocery retail sales, pre- and post-COVID-19, 2015-25

- **Leading retailers**

- **Major store-based players more easily capitalise on heightened demand**

Figure 7: Leading online grocery retailers' estimated market shares (excluding VAT), 2020

- **Pandemic also gives smaller players a chance to shine**

Figure 8: Alternative online food and drink retailers/services used since the COVID-19 pandemic began, December 2020

- **However, disruption to services as a result of the pandemic has impacted some perceptions**

Figure 9: Key metrics for selected brands, November 2020

- **The consumer**

- **A record 59% of consumers shop online for groceries**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: Use of online grocery services, December 2020

- **Demand driven by both new and existing users**

Figure 11: Changes in online grocery use since the COVID-19 pandemic began, December 2020

- **All demographics see an uptick, but it is most stark in groups with traditionally lower engagement in the channel**

Figure 12: Any use of online grocery services, by age, 2019-20

- **Much of this uptick has been circumstantial...**

Figure 13: Drivers of online grocery use since COVID-19, December 2020

- **...however, a majority will remain in the channel**

Figure 14: Online grocery usage intentions post-pandemic, December 2020

- **Home delivery remains key, but new modes of fulfilment show strong engagement**

Figure 15: How groceries are typically received, December 2020

- **Conditions of the pandemic serve to limit further growth in smartphone shopping**

Figure 16: Devices used to shop online for groceries, December 2018-20

- **A third of online grocery shoppers have shopped most often with Tesco since the pandemic began**

Figure 17: Online grocery retailers used and used most often since the pandemic began, December 2020

- **Overall satisfaction levels are high, but work is needed on recommendations, substitutions and click-and-collect**

Figure 18: Satisfaction with the shopping experience of the retailer used most often since the COVID-19 outbreak began, December 2020

- **Key underlying trends remain in the market**

Figure 19: Attitudes towards online grocery services, December 2020

## ISSUES AND INSIGHTS

- **The impact of COVID-19 on traditional online grocery services**
- **The diversification of the online grocery market**

## THE MARKET – KEY TAKEAWAYS

- **Concern combined with lower levels of movement drive record sales**
- **All online grocery sales grow by 75.2% in 2020**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **The groundwork for diversification has been laid in 2020**

## MARKET DRIVERS

- **Confidence nosedives as pandemic hits**  
Figure 20: The Financial Confidence Index, January 2016-March 2021
- **The pandemic has caused a schism in finances**  
Figure 21: Changes in current financial situation, March 2020
- **Online grocery sales accelerate during COVID-19 pandemic**  
Figure 22: Annual % change in all grocery retail sales and store-based online grocery retail sales, January 2019-January 2021
- **Online share of retail sales reach record proportions during COVID-19 lockdowns**  
Figure 23: Share of all grocery retail sales accounted for by store-based online grocery retail sales, January 2019-January 2021
- **Bigger orders drive online grocery average weekly sales**  
Figure 24: Store-based online grocery retail sales, average weekly sales, January 2019-January 2021
- **COVID-19 crisis drives down food prices**  
Figure 25: Inflation, year-on-year change in food and non-alcoholic beverage and alcoholic beverages and tobacco prices, January 2019-January 2021
- **Online shopping solutions to better suit the influx of older online shoppers'**  
Figure 26: Population size and age structure, 2015-25

## MARKET SIZE AND FORECAST

- **COVID-19 drives rapid growth within the online grocery market**  
Figure 27: Short, medium and long-term impact of COVID-19 on online grocery retail, 24 March 2021
- **Sales in the online channel near double in 2020...**  
Figure 28: All online grocery retail sales, 2015-25 (prepared on 15 March 2021)
- **...which will naturally lead to a necessary rebalancing in the short term...**  
Figure 29: Total online grocery retail sales (including VAT), 2015-25 (prepared on 15 March 2021)
- **...however the pandemic will lead to a greater role for online in the grocery sector moving forward**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 30: All online grocery sales as proportion of all grocery retail sales, pre- and post-COVID-19, 2021

- **Market drivers and assumptions**

Figure 31: Key drivers affecting Mintel's market forecast, 2015-25 (prepared on 5 March 2021)

- **Learnings from the last recession**

Figure 32: Composition of online grocery shoppers, by household income, 2012-20

- **Forecast methodology**

## MARKET SEGMENTATION

- **Store-based players take share in the enlarged online grocery market**

Figure 33: Split of all online grocery sales, by type of retailer, 2015-25

- **Conditions favour store-based players**

Figure 34: Online grocery sales by store-based grocery retailers (inc: VAT), 2015-25

Figure 35: Online grocery sales by store-based grocery retailers (inc: VAT), 2015-25

- **Online-only players hamstrung by model in 2020**

Figure 36: Online grocery sales by online-only retailers (including VAT), 2015-25

Figure 37: Online grocery sales by online-only retailers (including VAT), at current and constant prices, 2015-25

- **Diversification of mission and service will bring change market composition**

Figure 38: Estimated composition of the online grocery sector by type of service, 2018-20

## THE CONSUMER – KEY TAKEAWAYS

- **Concern combined with convenience drive record engagement in online grocery**
- **The vast majority of current users will remain in the channel**
- **New necessary modes of fulfilment will bring new missions into the market**

## IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **COVID-19 impacts all aspects of behaviour in a very different 2020**
- **Vaccine rollout having a material impact on concern levels**

Figure 39: COVID-19 Tracker: concern regarding exposure to COVID-19 and the impact of the pandemic on lifestyles, February 2020-March 2021

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **High levels of concern push customers online and away from stores**  
Figure 40: COVID-19 Tracker: impact of the pandemic on in-store and online behaviour, April 2020-March 2021
- **Stockpiling behaviours ease, but do indicate a level of 'preparedness' moving forward**  
Figure 41: COVID-19 Tracker: impact on availability and stockpiling behaviours, April 2020-March 2021
- **Concerns around the environment have not gone away**  
Figure 42: COVID-19 Tracker: shifts in priority due to COVID-19, 4-12 February 2021
- **Hygiene concerns with orders have been heightened by the pandemic**  
Figure 43: Attitudes towards the impact of COVID-19 on delivery and collection, August 2020
- **Lower levels of concern could see a quicker snap-back following the second national lockdown**  
Figure 44: COVID-19 Tracker: activities looked forward to once lockdown end, May 2020 and February 2021

## ONLINE GROCERY USE AND THE IMPACT OF COVID-19

- **Number using online grocery services grows**  
Figure 45: Use of online grocery services, December 2020
- **Growth driven by newer entrants...**  
Figure 46: Changes in online grocery use since the COVID-19 pandemic began, December 2020
- **...and existing users relying on online more**  
Figure 47: Types of online grocery users as a proportion of all online grocery users, December 2018-20  
Figure 48: Use of online grocery services, December 2018-20
- **For a small minority the pandemic has caused them to move away from online grocery**  
Figure 49: Reasons for reducing use of online grocery shopping since the COVID-19 outbreak began, December 2020

## DEMOGRAPHICS OF ONLINE GROCERY SHOPPERS

- **A year of significant shifts in the online grocery market**
- **Dramatic shift in older shoppers using online grocery services**  
Figure 50: Any use of online grocery services, by age, 2019-20  
Figure 51: Usage of online grocery services, by age, 2019-20

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Families still crucial, but uptick in smaller households can alter the market**

Figure 52: Usage of online grocery services, by parental status, 2019-20

- Significant growth in the number of lower-income households using online grocery services**

Figure 53: Any use of online grocery services, by household income, 2019-20

Figure 54: Usage of online grocery services, by household income, 2019-20

- Gap between urban and rural usage narrows**

Figure 55: Any use of online grocery services, by type of area/region lived in, 2019-20

## DRIVERS OF ONLINE GROCERY USE DURING THE PANDEMIC

- Unique conditions of the pandemic drive online grocery use...**

Figure 56: Drivers of online grocery use since COVID-19, December 2020

- ...however more time at home could drive longer-term growth**

Figure 57: Drivers of online grocery use since COVID-19, by changes in use of online grocery services, December 2020

## INTENTIONS POST-PANDEMIC

- Overall only 5% of online grocery shoppers plan to step away from online services**

Figure 58: Online grocery usage intentions post-pandemic, December 2020

- Older shoppers more likely to walk away**

Figure 59: Online grocery usage intentions post-pandemic, demographic breakdown of those who plan to stop shopping online for groceries, December 2020

- A quarter of first time users will transition to doing all/most of their shopping online...**

Figure 60: Online grocery usage intentions post-pandemic, by changes in online grocery use since the pandemic began, December 2020

- ...while nearly two thirds of high value online shoppers will continue their behaviour**

Figure 61: Online grocery usage intentions post-pandemic, by changes in online grocery use since the pandemic began, December 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## DEVICES USED TO SHOP FOR GROCERIES ONLINE

- **Less movement limits growth in smartphone penetration**

Figure 62: Devices used to shop online for groceries, December 2018–20

- **Younger shoppers still skew toward mobile, but 2020 has seen some move away**

Figure 63: Devices used to shop online for groceries, December 2018–20

## HOW GROCERIES ARE DELIVERED

- **Home delivery the most popular fulfilment method**

Figure 64: How groceries are typically received, December 2020

- **Use of third-party courier aligns with wider trends in that market**

Figure 65: How groceries are typically received, by age, December 2020

- **Those most reliant on online grocery have a broader repertoire of services**

Figure 66: How groceries are typically received, by level of online grocery shopping done, December 2020

Figure 67: Repertoire of ways online grocery orders are typically received, December 2020

## LEADING GROCERY RETAILERS USED

- **Tesco the most popular retailer to shop with online**

Figure 68: Online grocery retailers used and used most often since the pandemic began, December 2020

Figure 69: Online grocery retailers used, by online grocery shopped with most often since the COVID-19 pandemic began, December 2020

- **COVID-19 forces switching behaviour, opening up retailers to new audiences**

Figure 70: Forced changes in retailer usage due to lack of delivery slots, December 2020

- **Iceland one of the few to gain proportion of shoppers in the enlarged market**

Figure 71: Online grocery retailers shopped with, December 2018–20

Figure 72: Online grocery retailers used, by those who shopped online for groceries for the first time due to COVID-19

- **Tesco taps into value and Asda into the older demographic**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 73: Demographic profile of online grocery retailers used, by age and household income, December 2020

### ALTERNATIVE RETAILERS USED

- **One in ten consumers have used HelloFresh since the pandemic began**

Figure 74: Alternative online food and drink retailers/services used since the COVID-19 pandemic began, December 2020

- **Alternative platforms speak to a young and affluent audience**

Figure 75: Demographic profile of alternative retailers used, by average age and average household income, December 2020

### SATISFACTION WITH BUYING GROCERIES ONLINE

- **Overall satisfaction levels are high...**

Figure 76: Satisfaction with the shopping experience of the retailer used most often since the COVID-19 outbreak began, December 2020

- **...however delivery slots and substitutions need to be addressed**

Figure 77: Key drivers of overall satisfaction with online grocery retailers, December 2020

Figure 78: Impact of the lack of delivery slots on retailer perceptions, December 2020

- **Sainsbury's performs strongly, while Asda leads on collection**

Figure 79: Satisfaction with the shopping experience of the retailer used most often since the COVID-19 outbreak began, by leading retailers, December 2020

- **Methodology**

### ATTITUDES TOWARDS SUSTAINABILITY AND CONVENIENCE

- **Significant interest in convenient solutions to sustainability concerns**

Figure 80: Interest in sustainability initiatives, December 2020

- **Saved lists key for frequency of shop, scheduling a logical extension of this**

Figure 81: Convenience related behaviours of online grocery shoppers, December 2020

Figure 82: Convenience related behaviours of online grocery shoppers, December 2020

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## LEADING RETAILERS – KEY TAKEAWAYS

- **Rapid growth in demand drives record revenues for leading players**
- **Lack of delivery slots hit brand perceptions**
- **Rush of old and new delivery partners to fill gaps in logistical capabilities**

## LEADING RETAILERS AND MARKET SHARE

- **Major store-based players more easily capitalise on heightened demand**

Figure 83: Leading online grocery retailers' estimated market shares (excluding VAT), 2020

Figure 84: Leading online grocery retailers, estimated market shares, 2018-20

- **Leading players: revenues**

Figure 85: Leading retailers' net online grocery revenues, 2018-20

- **Leading players: revenue breakdown**

Figure 86: Leading online grocery retailers' estimated total online revenues, by grocery and non-grocery, 2018-20

- **Smaller players: market share and revenue**

Figure 87: Smaller online food and drink retailers, estimated and market shares, 2018-20

Figure 88: Smaller online food and drink retailers, turnover, 2018-20

## BRAND RESEARCH

- **What you need to know**
- **Brand map**

Figure 89: Attitudes towards and usage of selected brands, November 2020

- **Key brand metrics**

Figure 90: Key metrics for selected brands, November 2020

- **Brand attitudes: Amazon innovative and provides a great online service**

Figure 91: Attitudes, by brand, November 2020

- **Brand personality: extensive store presence enhances Asda and Tesco's accessibility, upmarket grocer Waitrose exclusive**

Figure 92: Brand personality – Macro image, November 2020

- **Morrisons welcoming, Iceland basic**

Figure 93: Brand personality – Micro image, November 2020

- **Brand analysis**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Amazon near universal brand awareness and highest brand usage**

Figure 94: User profile of Amazon, November 2020

- **Tesco trusted, reliable, accessible and offers good value**

Figure 95: User profile of Tesco, November 2020

- **Sainsbury's pricier than its nearest rivals, but more ethically minded**

Figure 96: User profile of Sainsbury's, November 2020

- **Morrisons lacks innovation and cutting edge appeal and has the lowest lifetime usage of the Big Four grocers**

Figure 97: User profile of Morrisons, November 2020

- **Asda basic, but good value for money and accessible**

Figure 98: User profile of Asda, November 2020

- **Iceland inexpensive, but somewhat untrustworthy**

Figure 99: User profile of Iceland, November 2020

- **Waitrose & Partners expensive and exclusive, but does not provide a great online service**

Figure 100: User profile of Waitrose & Partners, November 2020

- **Ocado lowest brand usage and least recommended by those who have used it**

Figure 101: User profile of Ocado, November 2020

## LAUNCH ACTIVITY AND INNOVATION

- **Leading courier foodservice delivery firms pivot toward grocery due to COVID-19**

Figure 102: Co-op Deliveroo in-store activation, December 2020

- **Existing couriers joined by a host of new entrants**

- **Centralised distribution in the local area, the future?**

Figure 103: Getir, IMAX Waterloo advertisement, March 2021

Figure 104: Gorillas order fulfilment in-centre, March 2021

Figure 105: Weezy advertisement, London March 2021

- **Autonomous robot and drone home grocery deliveries**

- **Eco-friendlier online grocery deliveries**

- **Zero-waste online grocer**

- **Making greener choices easier for online grocery shoppers**

- **100% vegan online supermarket**

## ADVERTISING AND MARKETING ACTIVITY

- **Near-53% year-on-year fall in total sector advertising spend in 2020**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Figure 106: UK online supermarket/grocer/food retailers' total recorded above-the-line, online display and direct mail advertising expenditure, 2016-20

- **Online-only Ocado is the sector's biggest advertising spender**

Figure 107: Leading UK online supermarket/grocer/food retailers' total recorded above-the-line, online display and direct mail advertising expenditure, 2016-20

- **A third of advertising expenditure channelled through door drops**

Figure 108: UK online supermarket/grocer/food retailers' total recorded above-the-line, online display and direct mail advertising expenditure, by media type, 2019-20

- **Leading advertisers favour different media types**

Figure 109: Leading UK online supermarket/grocer/food retailers' total recorded above-the-line, online display and direct mail advertising expenditure, by media type, 2020

- **Nielsen Ad Intel coverage**

## APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Data sources
- Financial definitions
- Abbreviations
- Consumer research methodology

## APPENDIX – MARKET SIZE AND FORECAST

- Forecast methodology

## APPENDIX – KEY DRIVER ANALYSIS

- Interpretation of results

Figure 110: Overall satisfaction with online grocery retailers – Key driver output, December 2020

Figure 111: Satisfaction with online grocery retailers – Key driver output, December 2020

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.