INCISIV

Digital Maturity Benchmark

Grocery Industry 2022

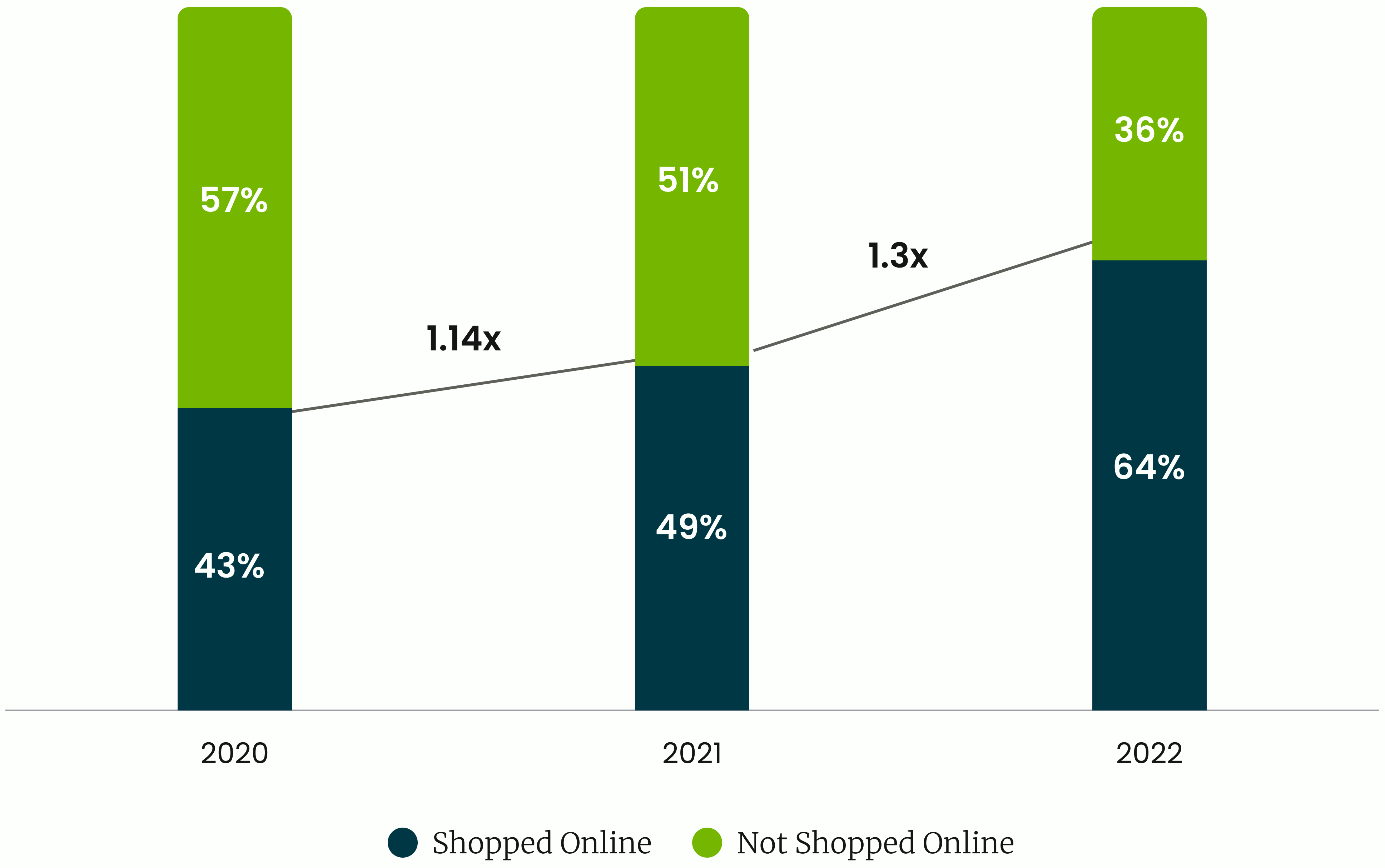
IN PARTNERSHIP WITH

mercātus®

Market Trends

Consumer Behavior & Outlook

Adoption of online grocery shopping



50%

higher adoption of digital shopping among higher income bands ($75,000 - $150,000).

20%

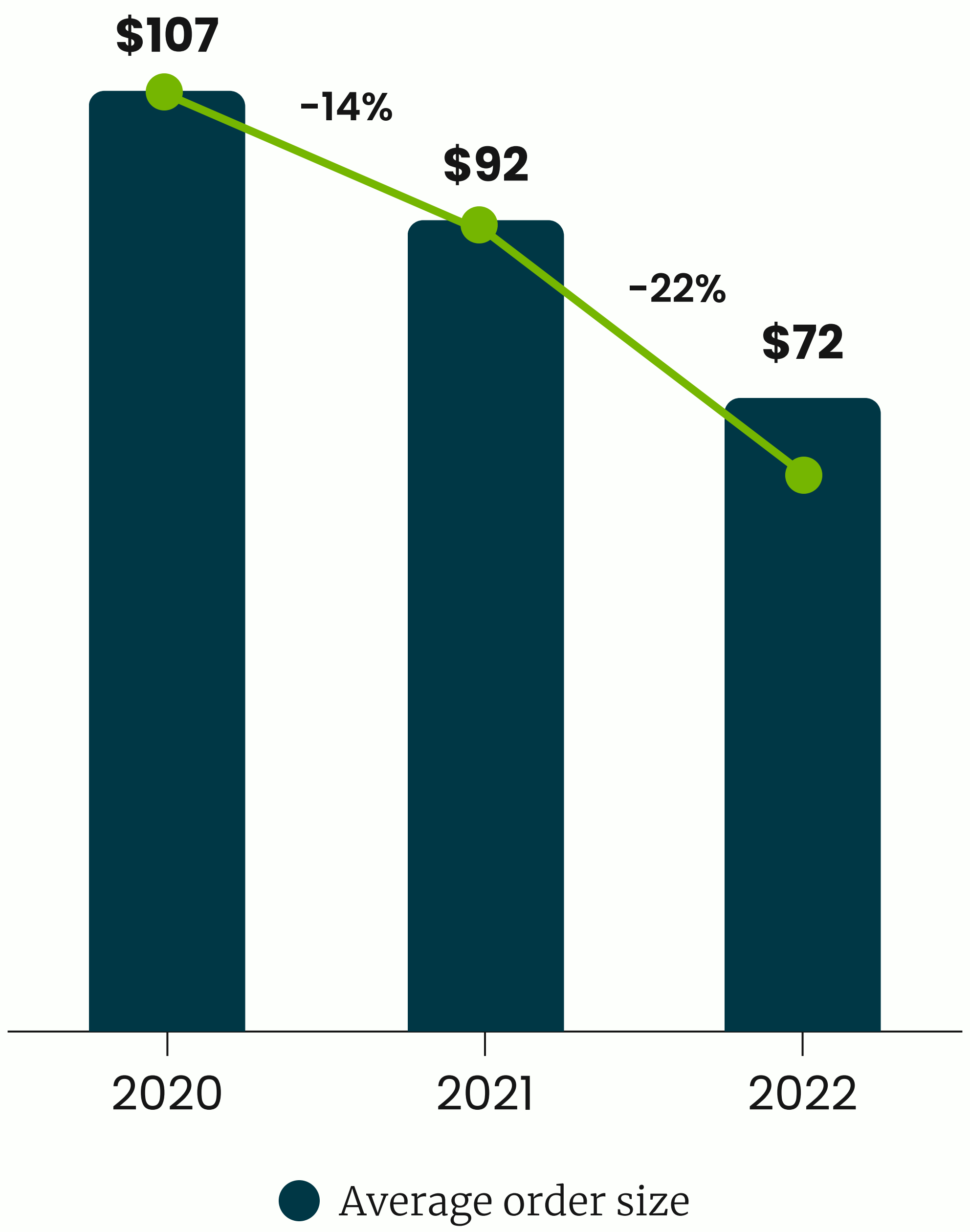
growth in adoption of online grocery shopping in 45-64 year age band (vs. 10% for other age bands).

Source: Incisiv Consumer Survey 2022

Adoption of online grocery shopping continues to grow. Spurred by pandemic-related restrictions, ease and convenience drive increased adoption.

The adoption of digital grocery shopping continues to increase across all demographic profiles.

Online shopping frequency



27%

decrease in large ticket (>$ 51) orders in H1 2022.

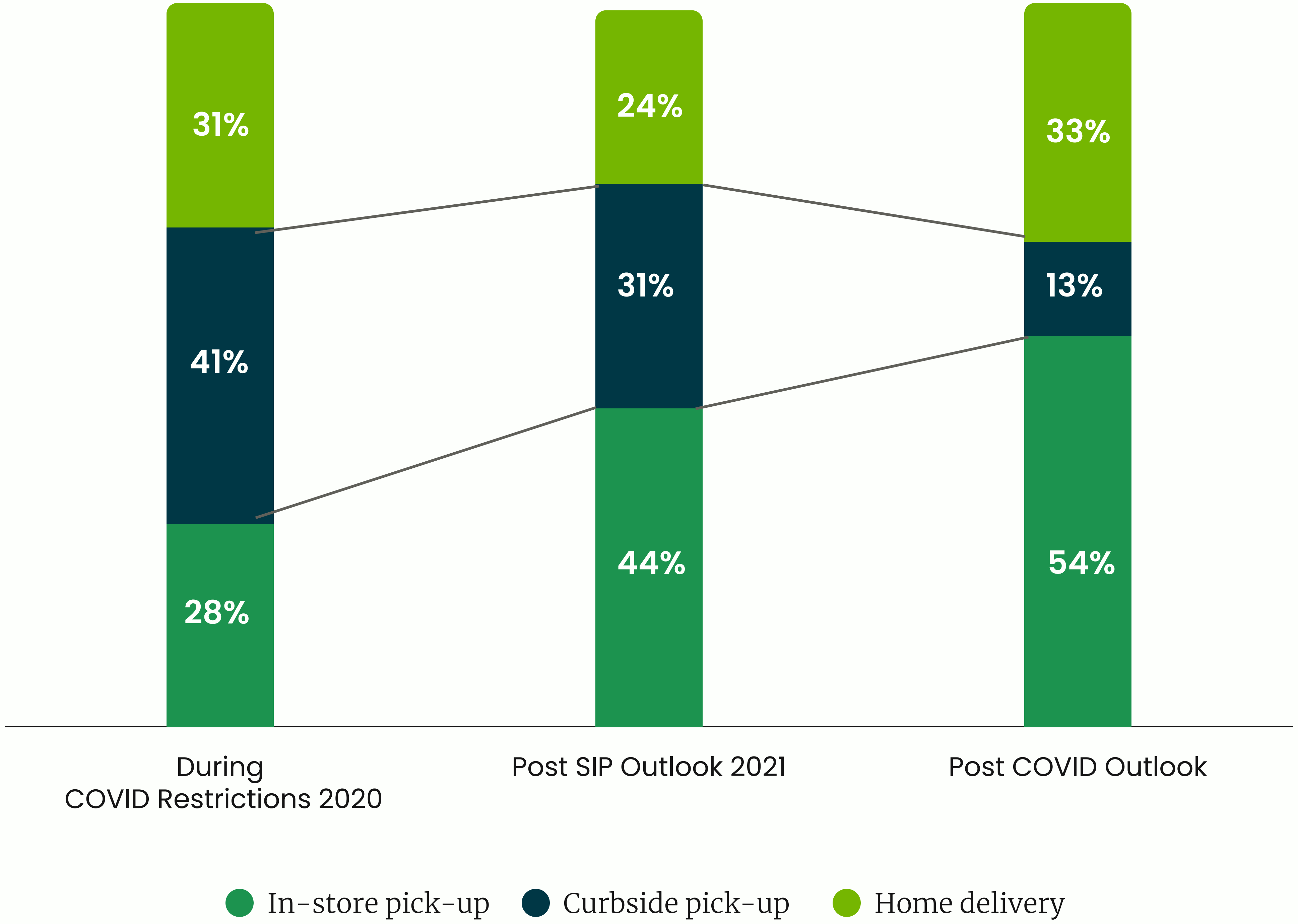
47%

increase in online shopping trips in 2022, with an average of 3.1 trips per shopper every month in 2022.

Source: Incisiv Consumer Survey 2022

The average number of shopping trips increased by 48%, while the average order value declined by 22% in 2022. Overall share of digital grocery sales increased by 1.5%-2%.

Shopper preferences for fulfillment of online orders



Source: Incisiv Consumer Survey 2022

As shoppers resume in-store shopping, fulfillment from the store surpasses home delivery.

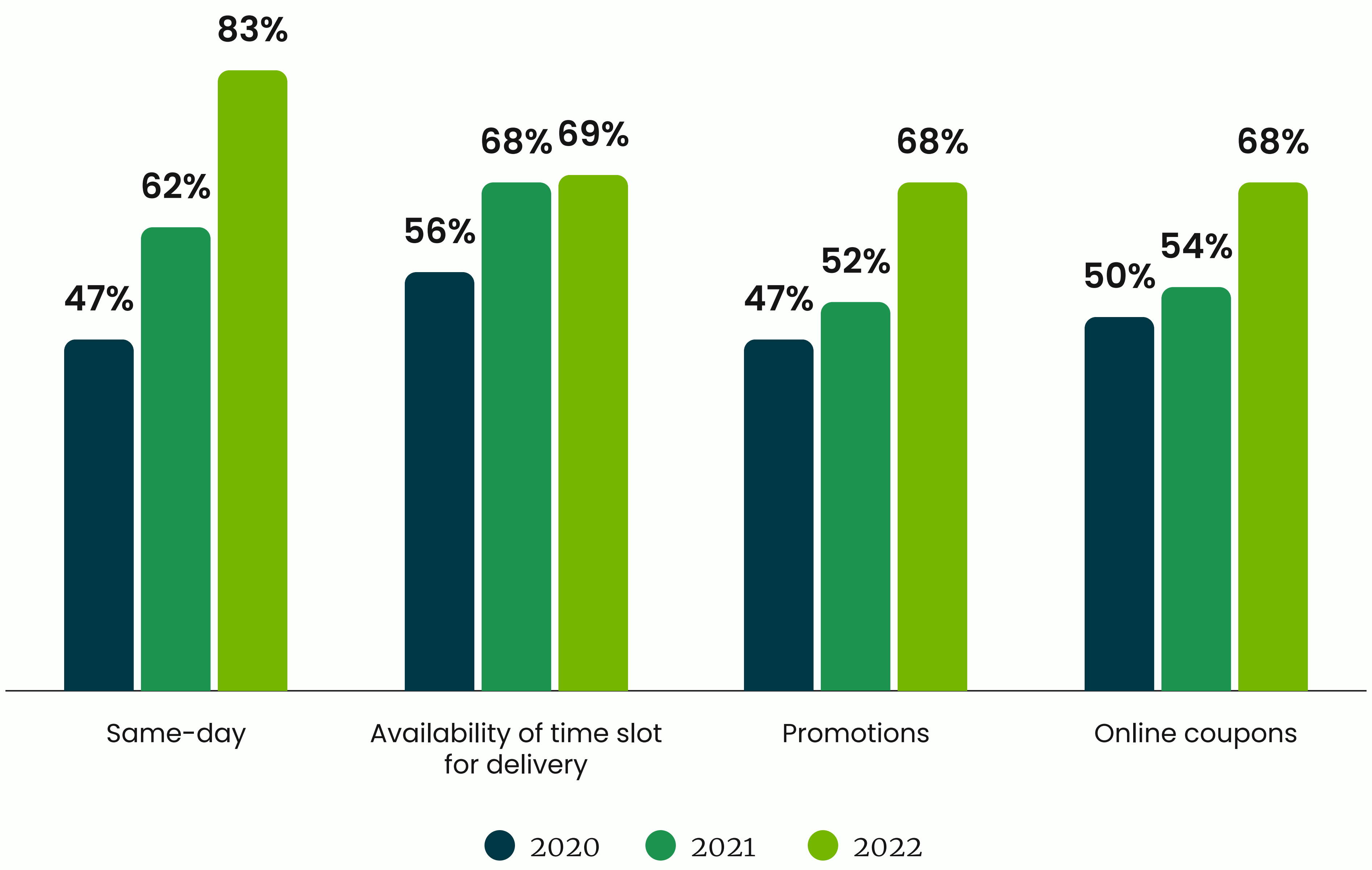
80% of the shoppers valued expedited delivery, but only 20% are willing to pay an additional $5-$10 for express 2-hour delivery.

Aligning with these trends, the grocery retailers assessed added nearly 2,500 stores (+3% YoY).

National retailers remain the first preference for online shopping, yet preference for third-party delivery providers increased by 7%.

Online shopping preference	2021	2022
National retailer's website/app Walmart TARGET	56%	56%
Online-only retailers amazon	33%	26%
Third-party delivery marketplace Shipt instacart	11%	18%

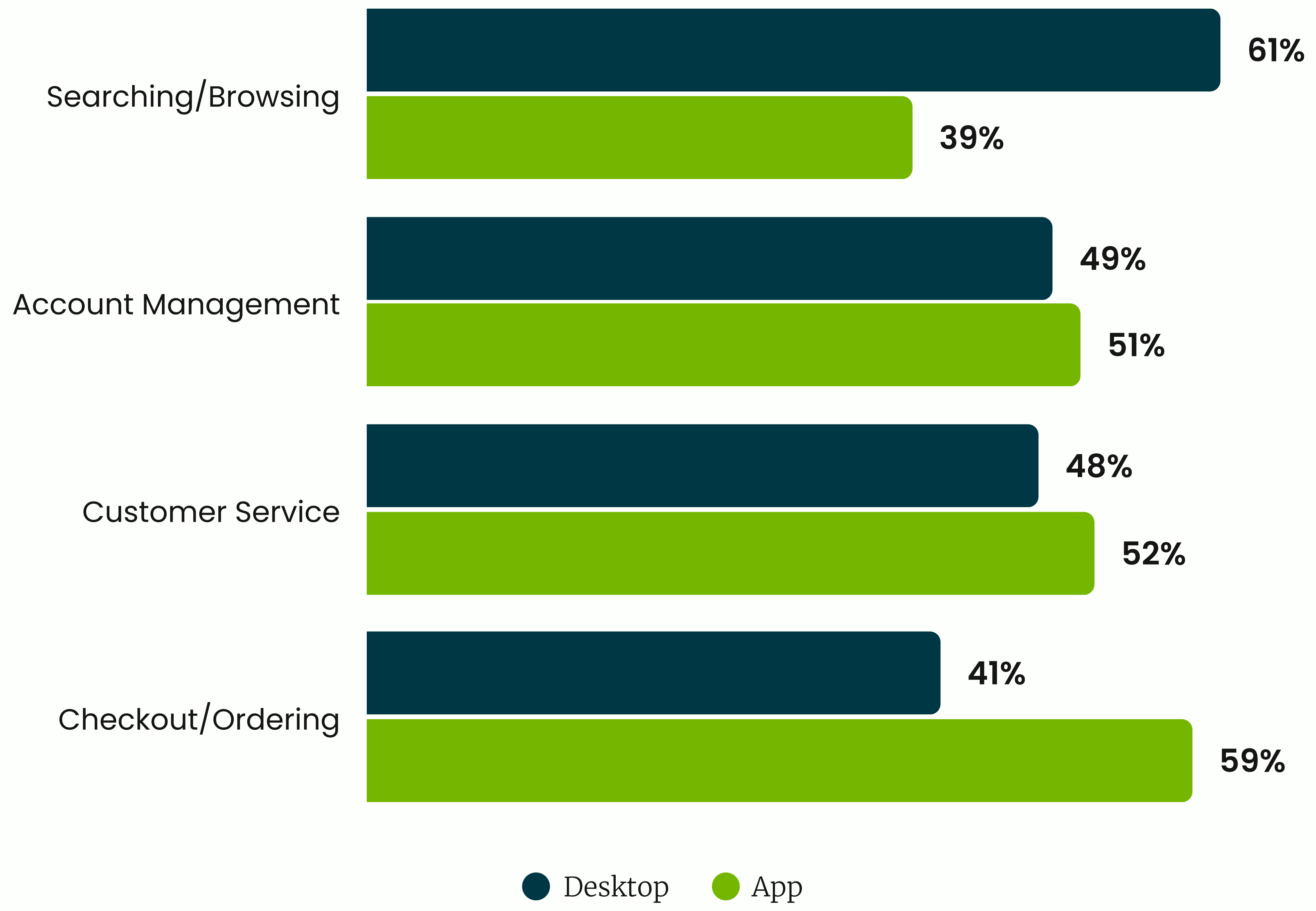
Changing shopper preference for ordering and fulfillment capabilities



Source: Incisiv Consumer Survey 2022

Incisiv's 2022 Digital Maturity Benchmark
in partnership with Mercatus

Digital channel preference by buy journey steps



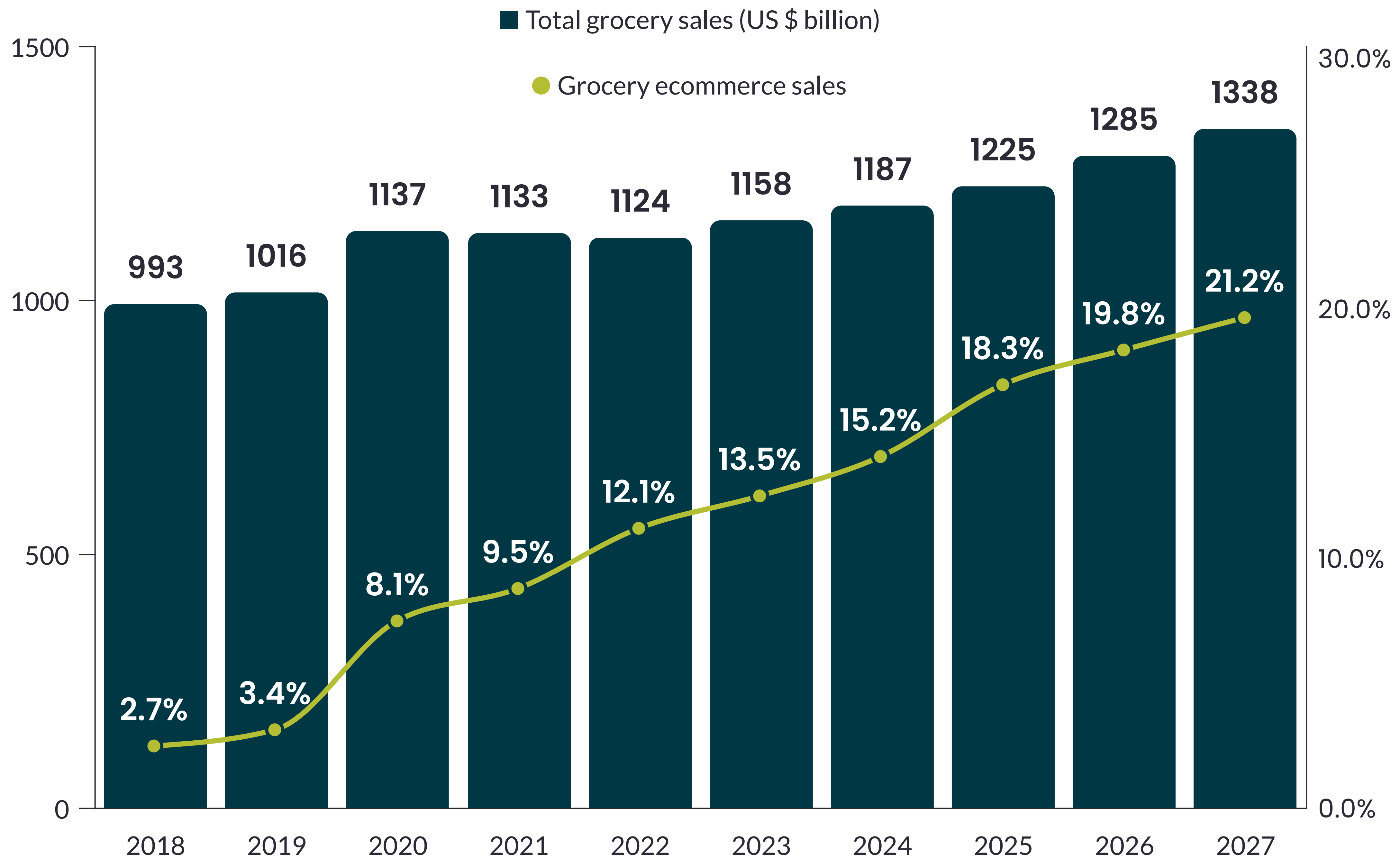
Source: Incisiv Consumer Survey 2022

67% of the shoppers prefer the retailer's mobile application over website for online shopping, a ~50% increase YoY.

Shoppers prefer desktop for search and discovery due to more content, better readability, and ease of navigation.

Mobile app is the preferred channel for customer service and order. Users find it easy to chat on the app and also like the linear, streamlined checkout.

Online grocery market size outlook



Increasing customer adoption due to ease and convenience will drive digital share of grocery revenue. Grocery digital sales are expected to reach ~20% by 2026.

Adoption of digital channels and share of digital revenue will continue to grow, as shoppers increasingly value speed, transparency, and customer service.

Retailers continue to invest in enhancing the front-end capabilities on the digital channel and streamlining back-end operations to offer a true omnichannel experience.

While many digital capabilities have evolved, grocers still have considerable progress to make to fully meet shopper expectations.

Research & Discovery	Online Ordering	Sustainability	Fulfillment	Customer Service
81% offer promotional callouts	64% allow shopper to modify the order after placement	55% offer sustainable packaging for products	89% allow shopper to track order status	83% allow shopper to contact specific store for customer support
5% offer filter for delivery time	9% provide option to pay using wallets or Google Pay and Apple Pay	30% offer callouts for sustainable products, such as organic, vegan, etc	24% offer option to pick up in two hours from store	22% offer membership programs

Digital Benchmarking Framework

Methodology & Approach

Incisiv's 2022 Digital Maturity Benchmark assesses top grocery retailers' digital channel experience and capabilities across four key areas.

The benchmark is comprised of the top grocery retailers (by annual revenue) across 6 different industry sub-segments. Each retailer's digital maturity capabilities and experience were assessed using an observational methodology.

Research & Discovery

Availability of information at the crucial decision points

64 attributes

61 attributes

Online Ordering

Order customization, inventory visibility, and payment options

60 attributes

55 attributes

Fulfillment

Availability, speed, and convenience of fulfillment

32 attributes

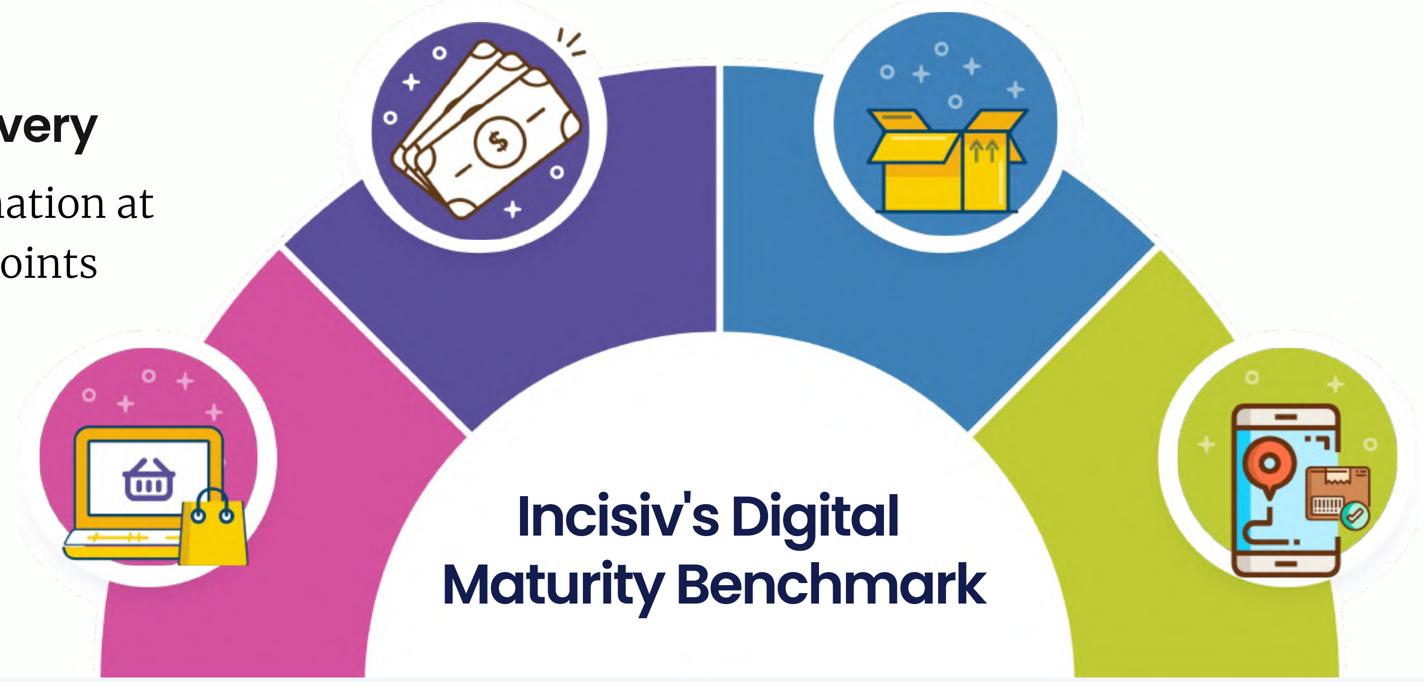
32 attributes

Customer Engagement & Service

Personalization, returns, and customer assistance

44 attributes

42 attributes



129

retailers benchmarked

118 retailers benchmarked in 2021

200

digital capabilities assessed

190 capabilities assessed in 2021

6

segments covered

Discount Stores, Hypermarkets, Supermarkets, Warehouse Clubs, Convenience Stores, Drug Stores

Unless stated otherwise, all data in this report is from Incisiv's 2022 Digital Maturity Benchmark.

Text in green indicates 2021 data

Each assessment area includes table stakes and differentiating experiences designations. These are defined based on their overall level of adoption, perceived value by shoppers, and impact on key performance indicators (KPIs), such as average order value (AOV), conversion, and traffic.

TABLE STAKES

Foundational capabilities are required to address key shopper expectations today. The absence of these capabilities has a negative impact on digital performance KPIs.

DIFFERENTIATING EXPERIENCES

Advanced capabilities that address important emerging shopper expectations. The presence of these capabilities has a positive impact on digital performance KPIs.

Illustrative examples of **table stakes** and **differentiating experiences**

Research & Discovery

- A dedicated section for promotions and rewards on the homepage
- A separate category for specialty diets
- Availability of nutritional and allergen information for products
- Detailed product ratings and reviews
- Nuanced Filters: sustainable products, stock availability, and fulfillment options

Online Ordering

- Presence of mobile app for online ordering
- Provide custom or special instructions for products
- Expedited checkout options
- Omnichannel inventory visibility
- Product subscription service
- Extended payment means: Apple Pay, PayPal, Google Pay, etc.

Frictionless Fulfillment

- Fulfillment options: Pickup, Home Delivery
- Real-time order notifications and alerts
- Order status visibility and tracking
- Expedited pick-up and delivery options (within two hours)
- A membership program for delivery
- Availability of locker collection service

Customer Engagement & Service

- Presence of sustainable and community support initiatives
- Store locations and details
- Option to save dietary profile
- Personalized product recommendations
- Advanced support via live chat
- Premium rewards/membership program

Digital maturity benchmark: Rating categories.

LAGGARDS

Laggards offer a severely lacking digital maturity, missing even some basic table-stakes functionality.

Adoption of table-stakes capabilities: Medium
Adoption of differentiators: Low

FOLLOWERS

Followers offer a basic digital maturity, addressing most table-stake capabilities. Their experiences lack depth and are light on the adoption of differentiated capabilities.

Adoption of table-stakes capabilities: Medium-High
Adoption of differentiators: Low

CHALLENGERS

Challengers offer a seamless digital maturity built on a solid foundation of capabilities. They offer some differentiated experiences but lack the depth and coverage of leaders.

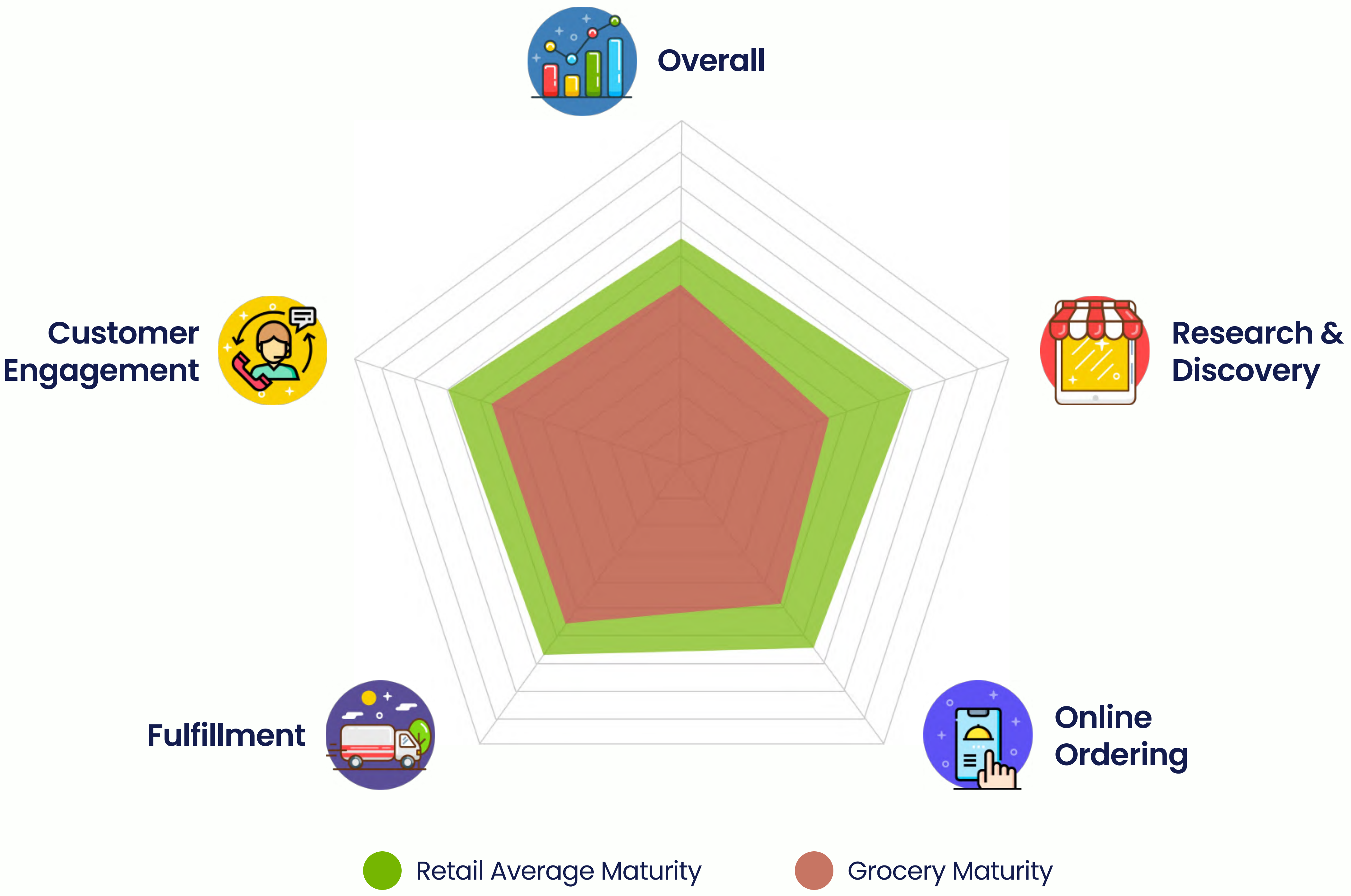
Adoption of table-stakes capabilities: High
Adoption of differentiators: Medium

LEADERS

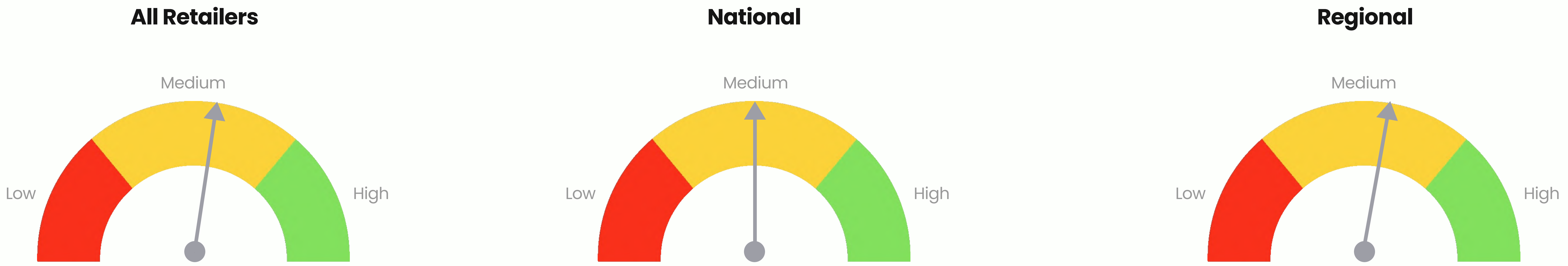
Leaders offer the richest maturity within and across retail segments. They lead in the adoption of differentiated experiences and are functionally mature across most assessment areas.

Adoption of table-stakes capabilities: High
Adoption of differentiators: High

While grocers have matured greatly in the areas of fulfillment and service, they continue to lag in content, navigation, and ordering capabilities.



Regional grocery retailers offer a functionally-richer digital experience compared to big box or national grocery chains.



Digital Capability	National	Regional
Capability to view and activate promotions/coupons at checkout	42%	58%
Capability to provide custom order instructions and driver notes for delivery	33%	71%
Order cancellation and modification	62%	76%
Advanced payment via gift cards, SNAP EBT, Google Pay	13%	30%

Digital maturity is highly correlated with revenue growth. Leaders are experiencing 6x higher growth compared to laggards.

2022
Digital Maturity
Leaders
Overall

Global Leaders in Overall.

Incisiv recognizes these 31 brands as leaders in the overall grocery shopping experience.

They have a strong foundation of table-stakes capabilities, along with leadership in the adoption of differentiating capabilities.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in digital shopping experience, in alphabetical order.

- Albertsons
- Auchan
- Big Lots!
- BJ's
- Carrefour
- coop @home
- Costco Wholesale
- Food City
- Hannaford
- H-E-B
- Hyper U
- HyVee
- Jewel Osco
- Kroger
- Loblaws
- Martin's
- Pick 'n Save
- Price Chopper
- Publix
- Safeway
- Sainsbury's
- Shaw's
- Sprouts Farmers Market
- Target
- Tesco
- The Fresh Market
- Waitrose & Partners
- Walgreens
- Walmart
- Wegmans
- Whole Foods Market

New to leader pack in 2022

01 | Research & Discovery

Ease of Search & Navigation

RESEARCH & DISCOVERY: OVERVIEW

Search and content visibility continue to be a work in progress for most retailers.

Shoppers look at online shopping as a substitute for in-store shopping. However, the experience of searching for products online can be frustrating. The grocery segment lags other industries in top-of-funnel engagement, as it fails to deliver fully functional search capabilities and full visibility into detailed product information for available substitutes. In addition, grocers lag in maturity around their online promotional offers, visibility, and easy redemption.

WHY IT MATTERS

With ~71% of grocery shoppers checking the website before even planning store visits, the research & discovery process of digital channels becomes the most crucial element for success. 40% of shoppers have shopped at a competitor due to a lack of information on their preferred retailer's digital channel.

52% of households

have health concerns and want the ability to filter products based on nutritional needs.

73% of shoppers

will leave a website if it fails to offer convenient navigation with relevant results.

77% of shoppers

actively seek promotions while shopping for groceries online.

WHAT WE ASSESS

This section evaluates the extensiveness of the search function, ease of navigation, and availability of information at important customer decision points in the shopping journey. The attributes assessed, if present, would greatly improve customer engagement and conversion.

64 total attributes assessed, including:

- Availability of functional search bar
- Availability of nuanced filters, including: product availability, fulfillment options, dietary restrictions, and sustainability
- Ease of finding products: relevant product tags, new launch highlights
- Inventory status callouts on product search listings
- Availability of product recommendations, ratings, and reviews
- Availability of information about sustainable products and practices

2022
Digital Maturity
Leaders
Research & Discovery

Global Leaders in Research & Discovery.

Incisiv recognizes these 30 brands as leaders in research and discovery.

They have a strong foundation of table-stakes capabilities, along with leadership in the adoption of differentiating capabilities for research and discovery.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in Research & Discovery, in alphabetical order.

Albertsons	Auchan	BIG LOTS!	BJ's	Carrefour	coop @home
COSTCO WHOLESALE	CVS	FAMILY DOLLAR	HYPER U	Iceland	Jewel Osco
Kaufland	Kroger	Loblaws	MARTIN'S	Morrisons	Netto Marken-Discount
ocado GROUP	Pick 'n Save	REWE	RITE AID	SAFEWAY	Sainsbury's
Target	TESCO	THE FRESH MARKET	Walgreens	Walmart	Wegmans

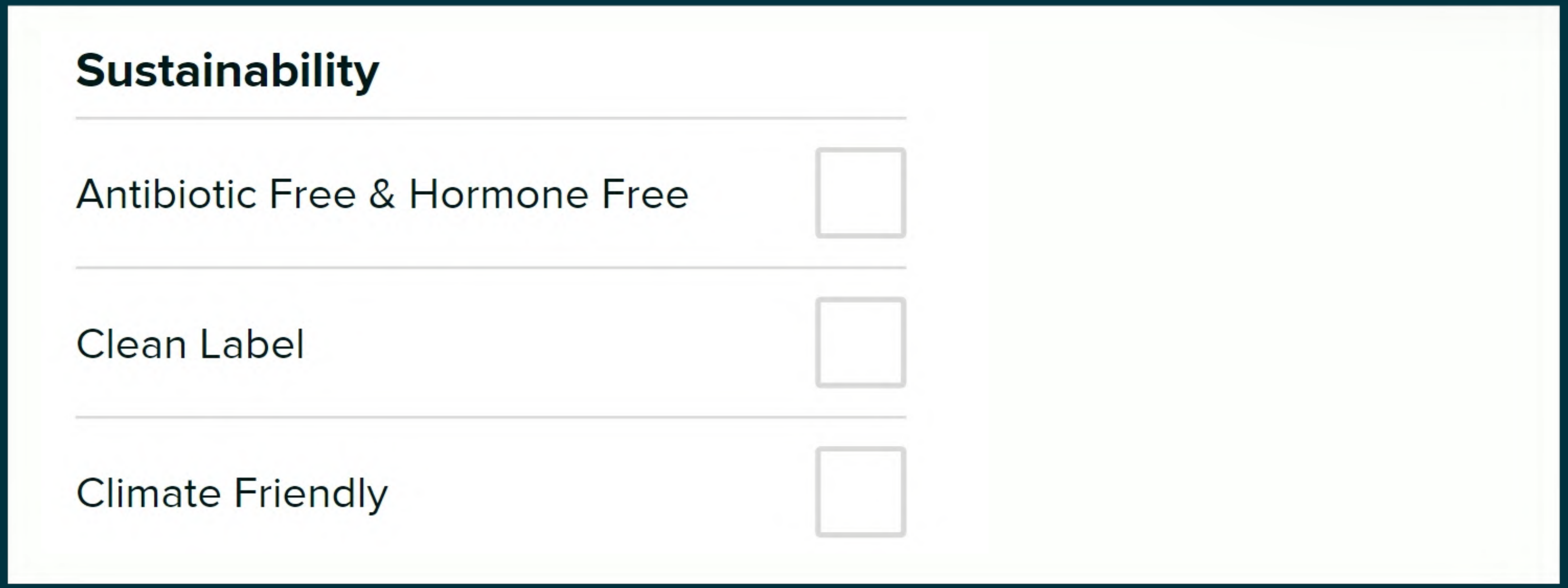
New to leader pack in 2022

Areas of high growth: Promotions and recommendations.

	2022	2021
Advanced sorting and filtering (allergens, nutrition, sustainability, etc.)	72%	51%
Product recommendations in search bar	34%	16%
Time-sensitive promotional callouts	28%	14%

Areas of no/low growth: Product information and transparency.

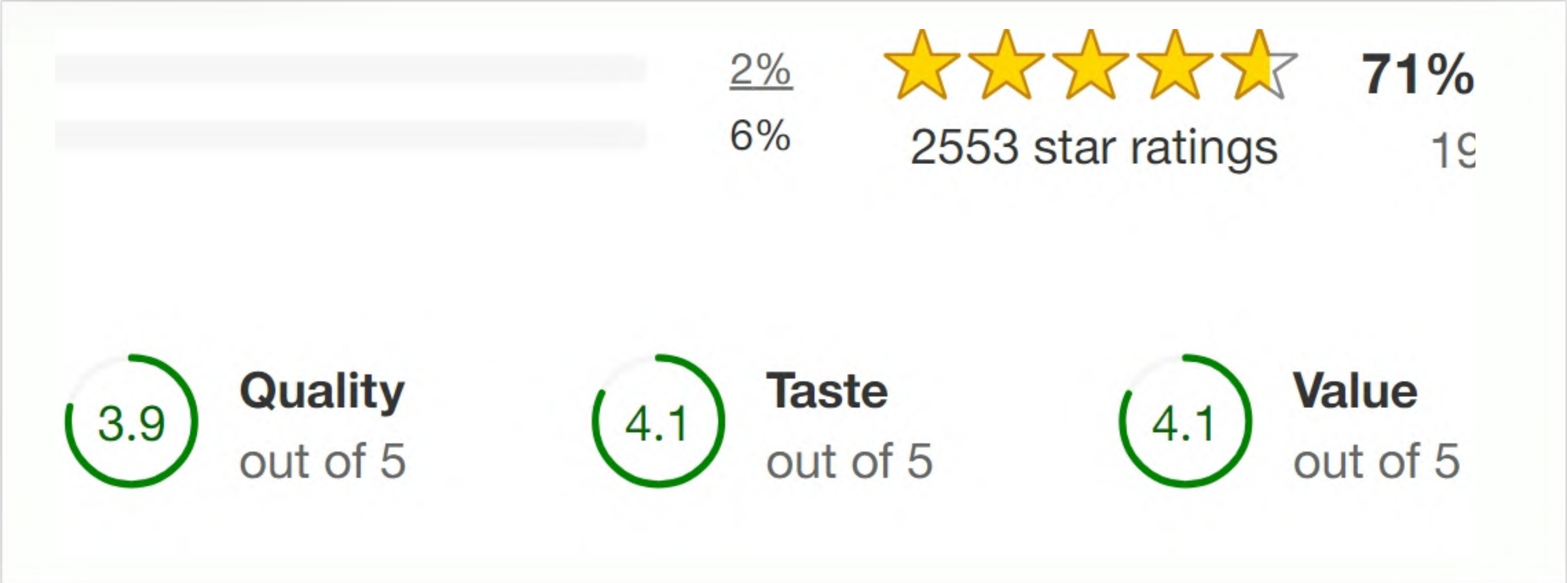
	2022	2021
Availability of product ingredients information	78%	76%
Separate category for specialty diet	47%	44%
Ratings across specific product dimensions (e.g. Nutri-Score)	9%	8%



Presence of filter for sustainable product options.

75% of shoppers are willing to switch brands to get access to sustainable food options. Shoppers now demand eco-friendly products and shopping formats. Grocery retailers are adapting to shoppers' evolving needs by providing a host of sustainable products and private label brands that cater to their requirements.

Martin's Foods has sustainability filters that include climate friendly and clean label options.



Availability of ratings across specific product dimensions.

50% of shoppers would be more inclined to buy products with a detailed display of reviews and ratings by other shoppers. Reviews provide transparency and are a significant factor impacting a purchase decision. However, only 8% of grocery retailers currently display reviews across specific product dimensions.

Target displays product reviews based on specific dimensions, such as taste, quality, and value.

02 | Online Ordering

Seamless Ordering & Checkout

ONLINE ORDERING: OVERVIEW

Minimizing ordering challenges through inventory accuracy and process streamlining.

Shoppers increasingly seek an efficient and seamless shopping experience. Some of the enabling capabilities to simplify the online ordering experience include: digital wallets, e-gift cards, and QR codes.

A major investment area for retailers remains real-time inventory visibility. Shoppers want to know both the availability of in-store inventory and the exact location of the product in the store.

WHY IT MATTERS

With 55% of shoppers checking inventory before making a purchase, accurate inventory visibility and tracking can help build shopper loyalty and drive omnichannel growth.

80% of shoppers

prefer to see coupons pre-applied or proactively suggested before the payment is finalized.

66% of shoppers

prefer getting an alert notification (via email) when an item is restocked.

20% of shoppers

abandon their cart if the checkout process is cumbersome or does not offer payment options.

WHAT WE ASSESS

This section evaluates the in-house and third-party platforms, presence of mobile apps for online ordering, and provides insights into real-time inventory visibility, customization of orders, as well as payment options offered by retailers.

60 total attributes assessed, including:

- Platform for product purchase: Brand website or third-party website
- Presence of the brand's mobile app for online ordering
- Cross-channel inventory visibility
- Product/order customization and recommendations
- Analysis of the steps involved in the checkout process, guest checkout availability
- Different payment options offered to shoppers

2022
Digital Maturity
Leaders
Online Ordering

Global Leaders in Online Ordering.

Incisiv recognizes these 32 brands as leaders in online ordering.

They have a strong foundation of table-stakes capabilities, along with leadership in the adoption of differentiating capabilities for online ordering.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in Online Ordering, in alphabetical order.

Bashas'	BJ's	Carrefour	Coborn's	Family Fresh Market	Food City
giant eagle	Harmons Neighborhood Grocer	H-E-B	Jewel Osco	Loblaws	Lowes Foods
meijer	Natural Grocers good4u	piggly wiggly	Price Chopper	Publix	Raley's
Roche Bros.	Save Mart	save on foods	Schnucks	Sprouts Farmers Market	Stater Bros. markets
Target	The Fresh Market	Tops Friendly Markets	Vallarta Supermarkets	Waitrose & Partners	Walmart
Whole Foods Market	Woodman's Markets Employee Owned				

New to leader pack in 2022

Areas of high growth: Enhanced checkout offerings.

	2022	2021
Multiple shipping options	51%	33%
Visibility of promotions on the cart page (e.g. BOGO, summer offer code)	55%	38%
Capability to pay via PayPal and wallets	36%	19%

Areas of no/low growth: Product inventory visibility.

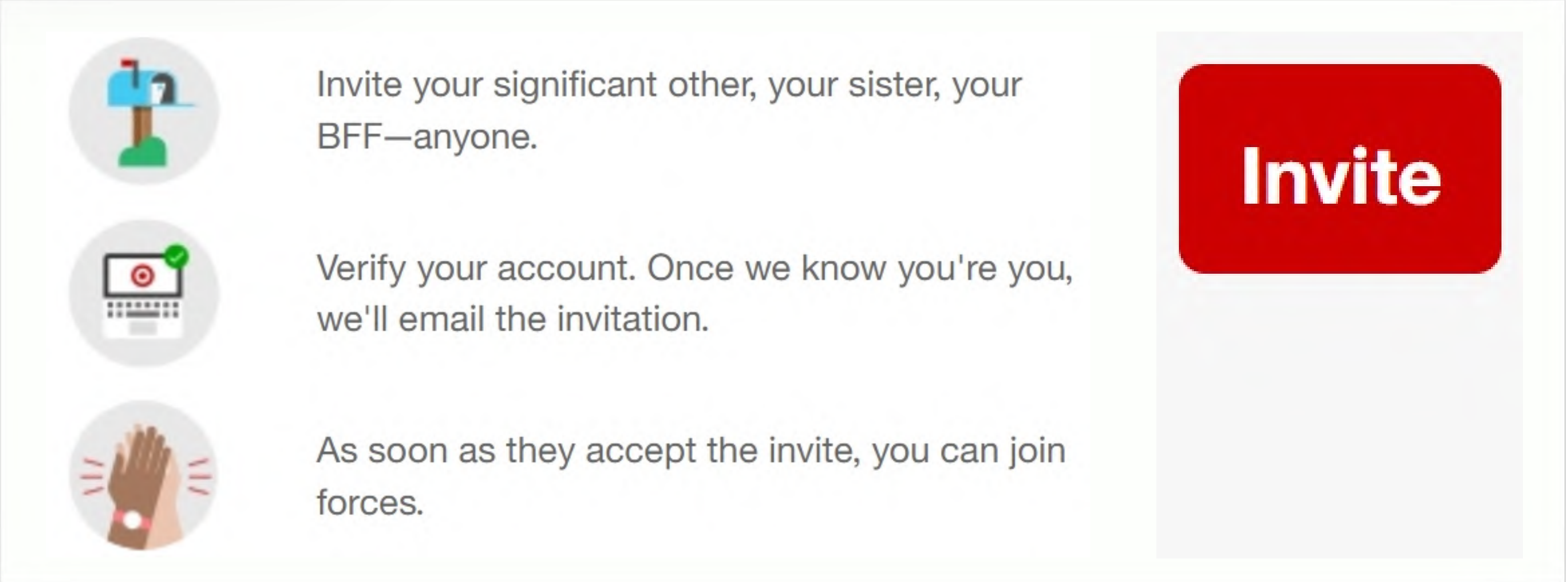
	2022	2021
View inventory status for products in cart	19%	17%
View exact location for products in store (aisle no.)	17%	12%
Capability to check in-store product inventory status	10%	10%

ONLINE ORDERING: SPOTLIGHT

In-store inventory visibility.

64% of shoppers emphasize stock availability as one of the top three factors for shopping at a particular retailer. Shoppers demand both online and in-store inventory visibility. However, currently only about 10% of grocery retailers offer in-store stock visibility.

Dollar General offers shoppers the advantage of checking the in-store inventory for a particular product at a store.



Group or shared shopping.

80% of shoppers believe that innovations enable a smoother digital ordering experience. Grocery retailers need to constantly improve their checkout experience by building on differentiating capabilities, such as shared or group carts. However, currently only about 10% of grocery retailers offer the option of sharing a cart with friends or family.

Target offers shoppers the advantage of collaborative shopping by giving them the option to invite partners to share the shopping cart.

03 | Frictionless Fulfillment

Convenience of Placing & Receiving Orders

FRICTIONLESS FULFILLMENT: OVERVIEW

Enhanced fulfillment experience through seamless expedited delivery at the lowest cost.

Big box retailers reaped the benefits of early investments in fulfillment options like BOPIS and curbside during COVID-19 restrictions. Offering a complete flywheel of online and store-based fulfillment options is now table stakes. Store-based expedited fulfillment led to a significant profitability impact for retailers. A continued focus on fulfillment excellence through store operating model redesign and investments in next-generation store technology will prove to be a winner in the long run.

WHY IT MATTERS

Availability of omnichannel fulfillment options and expedited delivery has become widespread, with nearly 60% of retailers now offering 30-minute to 2-hour delivery. However, it is still the delivery experience that will determine winners and losers.

80% of shoppers

valued expedited delivery but only 20% are willing to pay extra for it.

55% of shoppers

prefer to use lockers and other low-/no-contact collection options.

8x preference

urban vs. suburban households for home delivery.

WHAT WE ASSESS

This section evaluates the experience of placing and receiving an order through the different fulfillment methods offered. The efficiency and effectiveness of ordering are directly correlated to conversion and retention.

32 total attributes assessed, including:

- Adoption of different fulfillment options: curbside, pick-up counters, locker collection, BOPIS, and delivery
- Analyzing the speed and cost of fulfillment: timelines and availability, associated delivery fees, etc.
- Order status tracking and visibility
- Order customization requests: Driver notes, opt for contactless delivery
- Returns and exchanges for products purchased

2022
Digital Maturity
Leaders
Frictionless Fulfillment

Global leaders in Fulfillment.

Incisiv recognizes these 33 brands as leaders in fulfillment.

They have a strong foundation of table-stakes capabilities, along with leadership in the adoption of differentiating capabilities for fulfillment.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in Frictionless Fulfillment, in alphabetical order.

Albertsons, ALDI, Auchan, Bashas', Big Y, BJ's, Hy-Vee, Jewel Osco, Kroger, Loblaws, Martin's, metro, Pick 'n Save, Piggly Wiggly, Price Chopper, Price Rite Marketplace, Publix, Safeway, Sainsbury's, Save Mart, Schnucks, Shaw's, Sprouts Farmers Market, Stater Bros. Markets, Target, Tesco, The Fresh Market, Vallarta Supermarkets, Walgreens, Walmart, Wegmans, Whole Foods Market, Woodman's Markets

New to leader pack in 2022

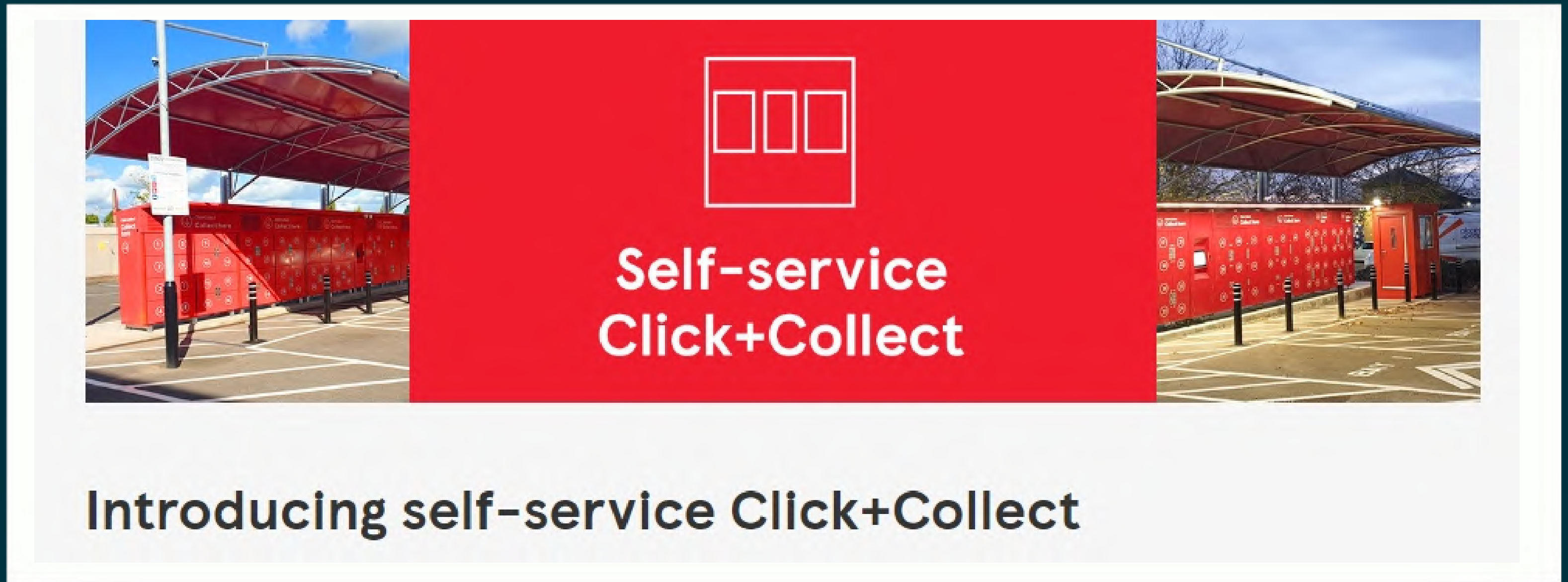
Areas of high growth: Elevated fulfillment experience.

	2022	2021
Availability of curbside pickup	72%	48%
Delivery via third-party	60%	45%
Expedited delivery (1-2 hours)	55%	40%

Areas of no/low growth: Order tracking and returns.

	2022	2021
Availability of tracking information	63%	58%
Capability to initiate and track returns online	30%	27%
Capability to track the delivery person in real-time	13%	10%

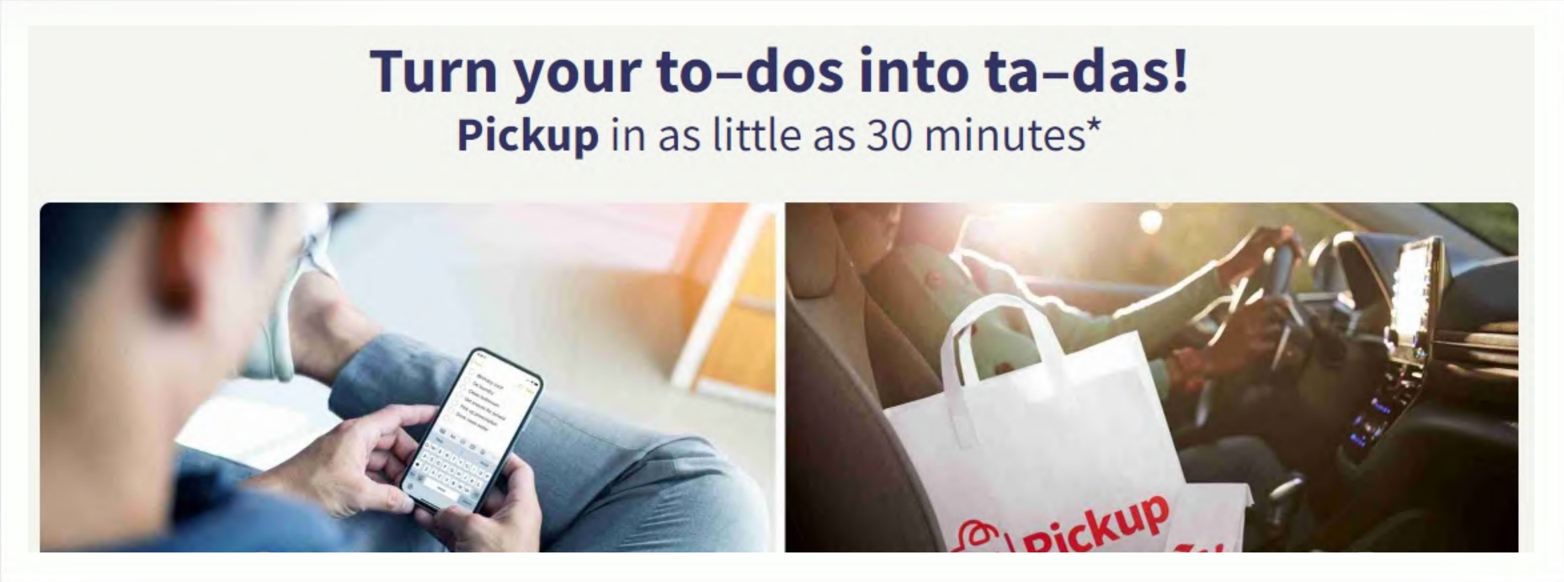
FRICTIONLESS FULFILLMENT: SPOTLIGHT



Locker collection service.

75% of shoppers would prefer self-service pick-up like lockers for convenience. Shoppers increasingly look to eliminate wait times. Click and Collect services save time and are user-friendly. However, only 12% of grocery retailers currently provide locker collection services to their shoppers.

Tesco offers shoppers a convenient and flexible pick-up option via self-collect locker stations.



Expedited pick-up options.

66% of shoppers prefer fulfillment options, which are efficient and quick, and retailers are responding with express pick-up service. The availability of expedited pick-up modes requires less time investment from customers and, if executed well, delivers a differentiated experience. At present, 24% of grocery retailers offer express pick-up options.

Walgreens gives shoppers the benefit of an express pick-up option as an added convenience.

04 | Customer Engagement & Service

Customer Satisfaction & Issue Resolution

Personalized experience and 360-degree service.

In an increasingly digital world, transparency, convenience, and personalized communications are pillars of trust and satisfaction.

Do you provide authentic sales and service, including instant refunds for returns? Can shoppers view their purchase history and receipts?

In addition, shoppers now pay close attention to sustainability, community initiatives, and tailored shopping experiences.

WHY IT MATTERS

Shoppers want a more personalized experience pre- and post-purchase. In addition, shoppers want to associate with brands that share their concerns and preferences. Since 90% of shoppers are concerned about sustainability, it is crucial for retailers to build an eco-friendly brand.

53% of shoppers

are willing to pay extra for sustainable packaging for their products.

77% of shoppers

prefer a grocer who can offer a personalized experience.

80% of shoppers

prefer chat-based support and 60% prefer to use a mobile device for support issues.

WHAT WE ASSESS

This section assesses all aspects of post-sales service and personalization, including the ease with which shoppers can contact customer service or get their queries resolved, return policies, and engagement practices.

44 total attributes assessed, including:

- Availability of self-help tools, including live chat options and FAQs
- Store locations provided with contact numbers and hours of operation
- Option to create a personal profile, and save payment preferences and multiple addresses
- Availability of a loyalty program with the option to redeem rewards online
- Availability of customer engagement and shopping assistance options
- Availability of information on sustainable packaging and community initiatives

2022
Digital Maturity
Leaders
Customer Engagement
& Service

Global leaders in Customer Engagement & Service.

Incisiv recognizes these 32 brands as leaders in Customer Engagement & Service.

They have a strong foundation of table-stakes capabilities, along with leadership in the adoption of differentiating capabilities for customer engagement.

The entire leaderboard is available at the end of the report.

Retailers rated as leaders in Customer Engagement & Service, in alphabetical order.

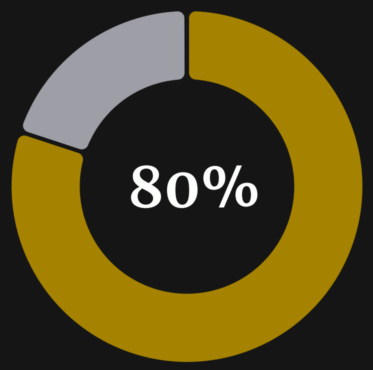
Albertsons	BJ's	BGC Brookshire Grocery Company	Carrefour	Continente online	coop @home
CRAI	Esselunga	Family Fresh Market	Food City	Foodland Food, Family, Friends & Aloha.	giant eagle
Hannaford	Harmons Neighborhood Grocer	HyVee Employee Owned	Jewel Osco	Kroger	Loblaws
Martin's	metro	Monoprix	Pick 'n Save	Publix	Raley's
REWE	Safeway	save on foods	shaw's	Target	United supermarkets
Walmart	weis				

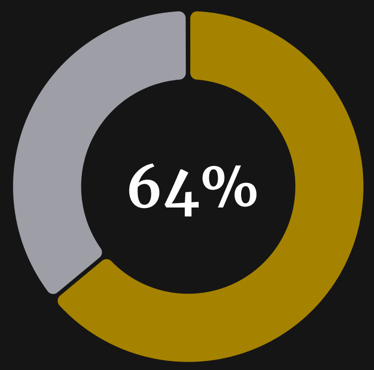
New to leader pack in 2022

Areas of high growth: Transparent policies and engagement.

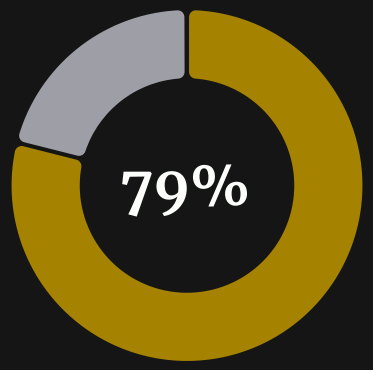
2022 | 2021

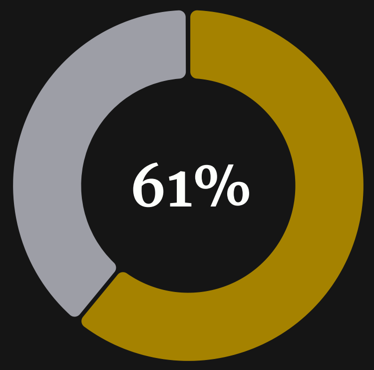
Presence of community support initiatives



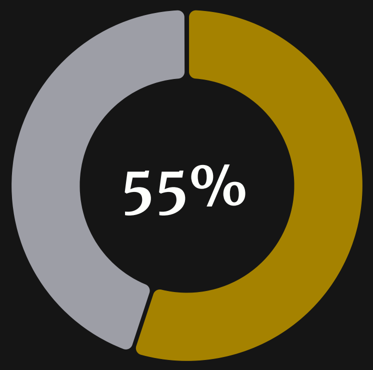


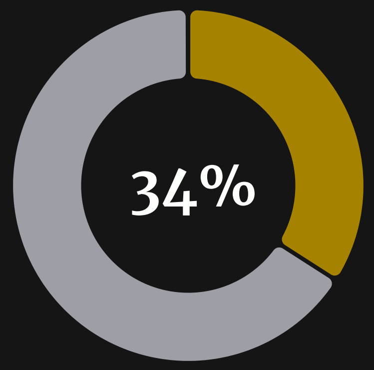
Availability of return and refund policies





Presence of survey for customer experience management

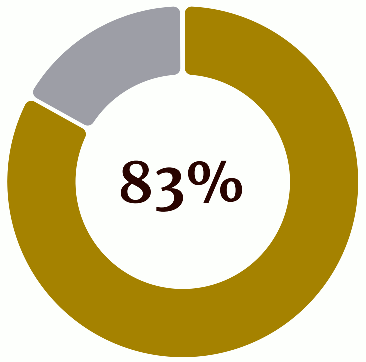


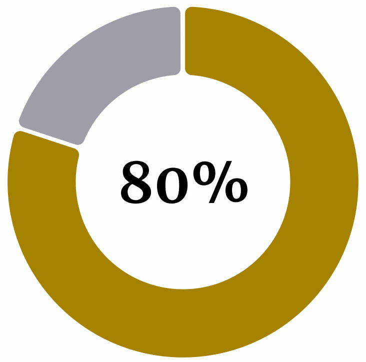


Areas of low growth: Customer service experience.

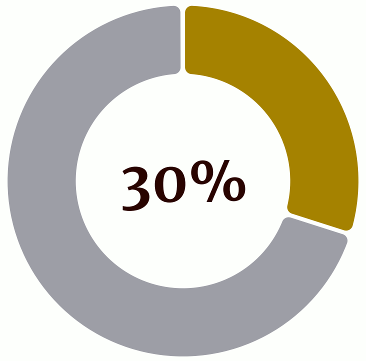
2022 | 2021

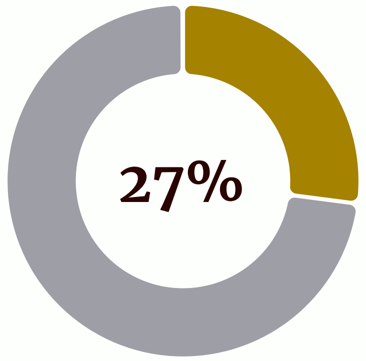
Contact store directly for support



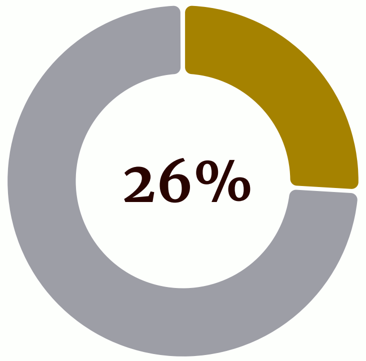


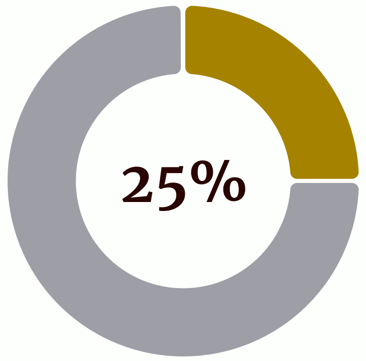
Availability of live chat



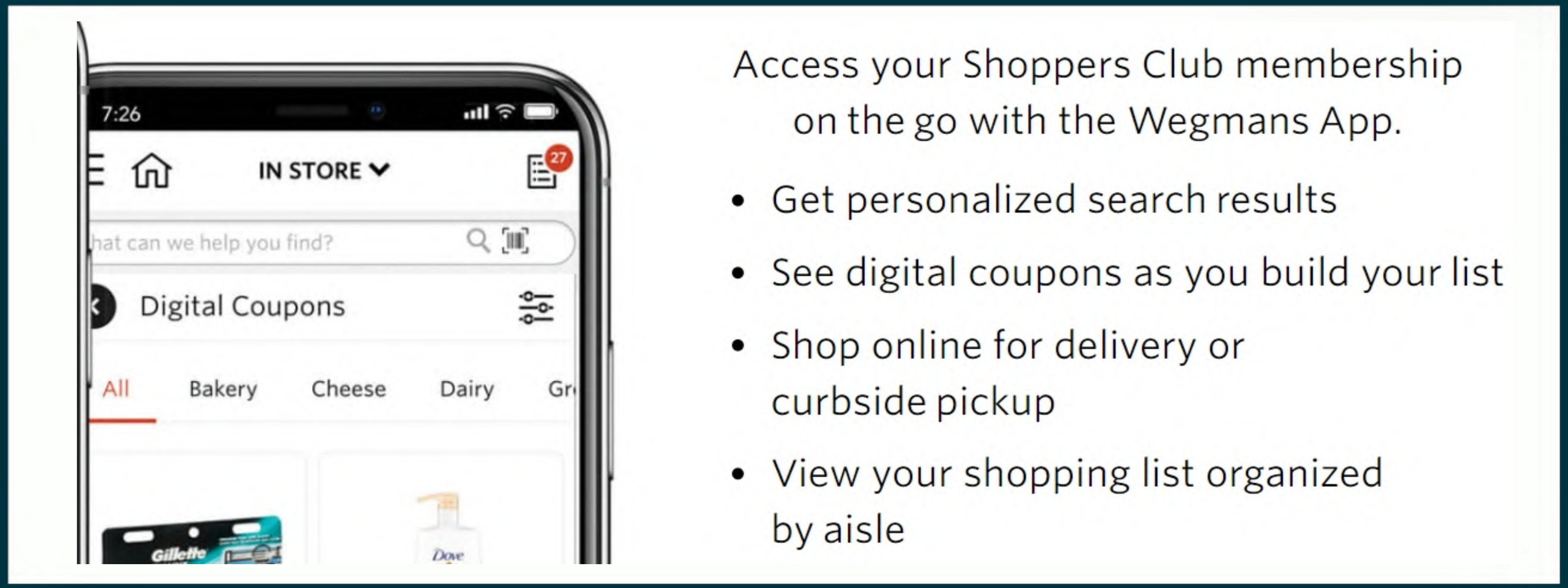


Virtual assistant integration





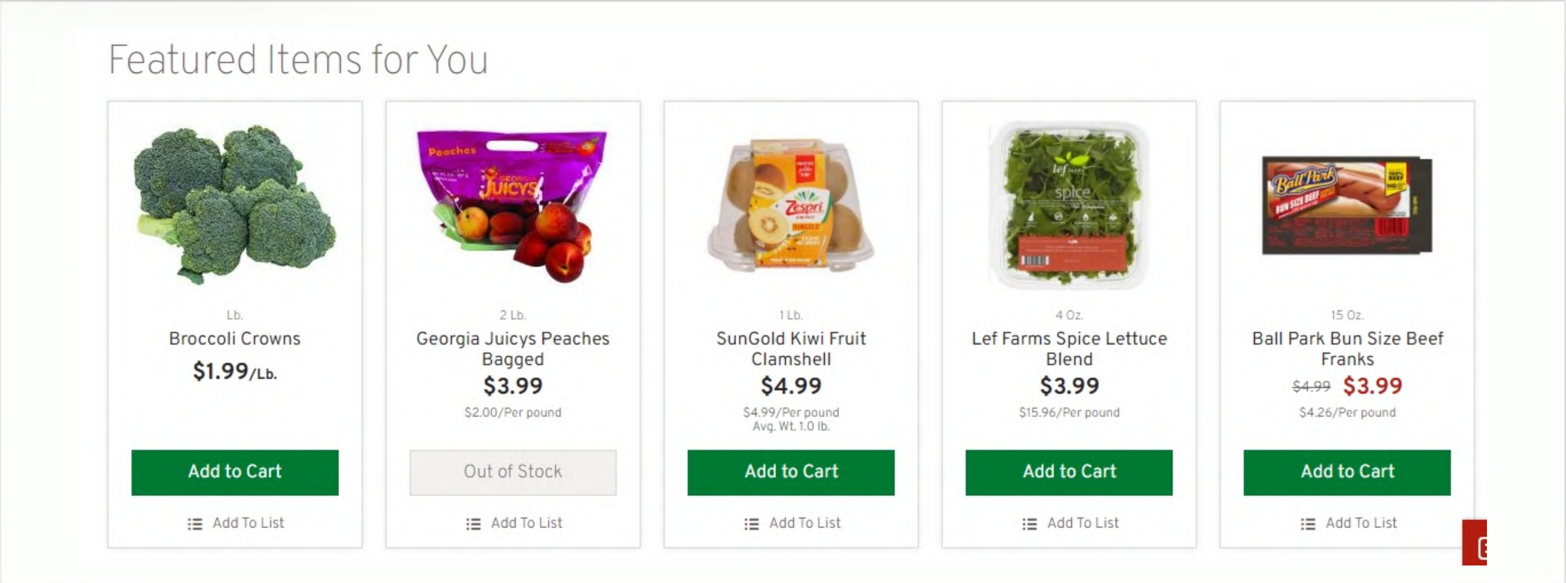
CUSTOMER ENGAGEMENT & SERVICE: SPOTLIGHT



Mobile app ordering and benefits.

43% of shoppers prefer to use the mobile app to place orders. Immense importance is given to convenient modes of shopping. Grocery retailers' mobile apps are not only handy but enable access to additional benefits, such as real-time promotions, rewards tracking, and mobile payments.

Wegmans' mobile app offers shoppers a host of benefits, such as a personalized shopping experience and access to aisle locations for their shopping lists.



Personalized product recommendations.

80% of shoppers prefer retailers that provide them with a personalized shopping experience. The availability of suggestions and offers based on purchase activity is highly sought after. At present, only 9% of grocery retailers provide recommendations based on shoppers' activity.

Hannaford displays product recommendations on the homepage based on the shopper's search and purchase history.

Leaderboard

Leaderboard

As part of its 2022 Digital Maturity Benchmark Incisiv assessed 129 retailers across 6 different industry sub-segments. The complete list of assessed retailers is provided here.

Each retailer assessed was given an overall rating as well as a functional-area rating across research and discovery, online ordering, fulfillment, customer engagement, and service. Incisiv's analysis found:

- 31 Leaders
- 33 Challengers
- 33 Followers
- 32 Laggards

Get in touch to request detailed information about your rating, or to request a custom benchmark.

7-Eleven
99 Cents Only
99 Ranch
Albert Heijn
Albertsons
Aldi
Auchan
Bashas'
Big Lots
Big Y foods
BJ's Wholesale
Brookshire's
Calgary Co-op
Carrefour
Chedraui
Circle K
Coborns
Conad
Consum
Continente Modelo
Co-op at Home
Coop Italia
Coop Sweden
Co-op UK
Costco
CRAI
Cub Foods
CVS
Denner
DIA S.A.
Dierbergs
Dollar General
Edeka

Eroski
Esselunga S.p.A
Eurospin
Family Dollar
Family Fresh Markets
Fareway
Festival foods
Food City
Food Lion
Foodland Supermarket
Giant Eagle
Giant Tiger
Globus
Grocery Outlet
H Mart
Hannaford
Harmon's Neighborhood Grocer
Harps
Harris Teeter
H-E-B
Hipercor
Hyper U
Hy-Vee
ICA Supermarket
Iceland Foods
Ingles
Intermarché
Jewel-Osco
Jumbo
Kaufland
Kesko K Citymarket
King Kullen
Konzum

Kroger
Lidl
Loblaw
Louis Delhaize
Lowes Foods
Market Basket
Martins Food
Meijer
Mercadona
Metro
Metro
Monoprix
Morrisons
Natural Grocers
Netto Marken
Ocado
Pick N' Save
Piggly Wiggly Midwest
Price Chopper
Price Rite
Prisma
Publix
Raley's
Real
Rewe
Rite Aid
Roche Bros.
Rouses Markets
Safeway
Sainsbury's
Save Mart
Save-A-Lot
Save-On-Foods

Schnucks
Sedano's
Shaw's
ShopRite
Smart & Final
Sobeys
SPAR
Speedway
Sprouts Farmer Market
Stater Bros
Strack & Van Til
Target
Tesco
The Fresh Market
Tops Markets
Trader Joe's
United Supermarkets
Vallarta Supermarkets
Voila by Sobeys
Waitrose
Walgreens
Walmart
Wegmans
Weis Markets
Wesley Kosher
Whole Foods Market
Willy's
WinCo Foods
Winn-Dixie
Woodman's Food Markets

Leaders

Incisiv's 2022 Digital Maturity Benchmark is based on insights from its proprietary digital maturity benchmarking methodology.

NEXT STEPS

- **Request a custom benchmark** for your brand
- **Share this report** with a friend or colleague via email or social media

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ABOUT INCISIV

Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption.

Incisiv offers curated executive learning, digital maturity benchmarks, and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

www.incisiv.com

ABOUT MERCATUS

Mercatus offers an enterprise-grade, multi-tenant SaaS platform that provides more than 50 pre-built integrations, advanced features, multiple fulfillment options, and an in-house implementation team to ensure eCommerce success. Built for web and mobile, we help leading grocers deliver an exceptional omnichannel experience - from store to door. The Mercatus Digital Commerce platform is used by leading North American retailers, including Weis Markets, Save Mart brands, Brookshire’s Grocery Company, Kowalski’s Markets, WinCo Foods, Smart & Final, Stater Bros. Markets and others

www.mercatus.com