StratX

insight VOL. 01

BUYVIOR

The Changes in Monthly Shopping Patterns in Indonesia

Introduction

As the selling pattern shifts from product-centric to customer-oriented, businesspeople need to design new strategies to win customers' heart. Nowadays, customers are not merely the object of a business, but also the subject who can set the value of a product or a brand. It is no longer sufficient to win customers' heart only at the level of the customer's perception.

Consumers who are satisfied with the whole purchasing process have the potential to become repeat costumers,

Customers experience during the purchasing process is a critical consideration moment in choosing a brand or product.

even likely to recommend the brand to others. On the contrary, unsatisfactory experience can be dangerous when the story appears on social media. This can give bad perception to others who read the story. Therefore, understanding the customers and their needs, as well as identifying each of their experience, are very important to strengthen the position of a brand or product as the customer's main choice.

Is Demographic Still Relevant?

In this disruption era, understanding the customers and their experiences are important for retail companies in Indonesia. This is particularly because the retailers have decided to reduce, or even fold up, their outlets. In addition, the emergence of online marketplace has created a new trend, which is the shift of offline to online shopping that makes shopping process easier and shorter.

Therefore, retail companies need to review customer's shopping patterns, schemes, and experiences to be able to learn more about customer's needs and the problems they are facing.
• What are their needs in this digital disruption era?
• Is it true that online shopping trend has affected the grocery shopping pattern?
• Have the customers utilized numerous shopping channels?
• Then, what is the scheme of their grocery shopping?

Benefits of This Whitepaper For You
• Understand retail customers better in order to see their shopping pattern, schemes, as well as experiences.
• Present pain points and other feelings that customers encounter before they shop, while they shop at a store (Super/Hypermarket), and after they shop.

We hope this whitepaper can be useful for you, especially those engaging in grocery retail industry. For further inquiries, don't hesitate to contact us.

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Part o1
**Types of Customer
in Indonesia**

The change in today's grocery retail landscape is not easy for grocery retailers. The competition for those food retailers now includes super/hypermarket and minimarket; overwhelming the big players in increasing their sales.

Moreover, the data show that the rapid growth of minimarket in the last decade that is in line with the decline of super/hypermarket becomes the main indicator of the change in grocery retail competition.
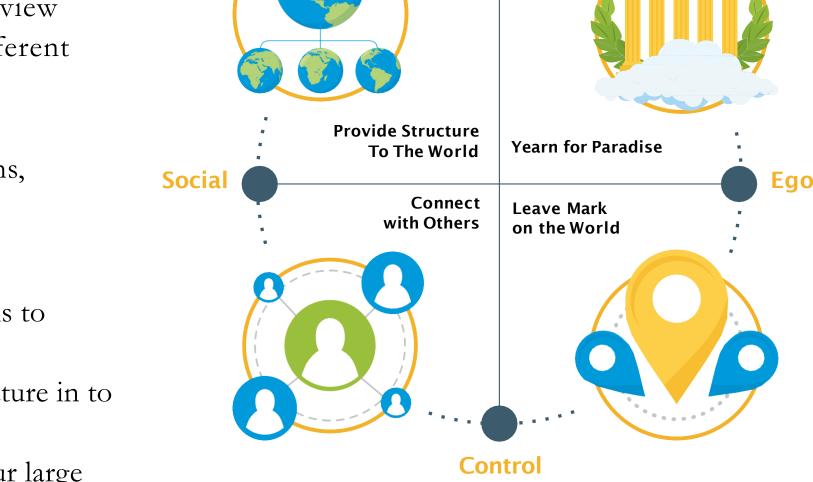
With the increasingly fierce competition, super/hypermarket players need to create a program to maintain their existing customers. One of the most appropriate ways to do so is by understanding the customers better.

Understanding the customers is not merely about knowing their motivation or perception, but we need to dig deeper. We need to keep track customers before they go to shop, as they move to the store, and after they finish shopping at the super/hypermarket.

Therefore, let's get to know more about (1) who the customers are, (2) what are the characteristics that influence them in shopping, and (3) how shopping motivation takes part in influencing their behaviour and experience. Let us start with the interview results from 10 respondents with different characteristics to further understand the background of each respondents, which includes their aspirations, dreams, behavioural activities, and their motivations to shop.

After collecting the data, the next step is to identify and classify it using Carl Jung's archetype theory that divides human nature in to 12 personalities. When regrouped, these 12 archetypes are divided into four large groups of human nature:

Freedom

Provide Structure
To The World

Yearn for Paradise

Social

Ego

Connect
with Others

Leave Mark
on the World

Control

Carl Jung archetype theory

Freedom

FAMILY SHOPPER

FREEDOM SHOPPER

Provide Structure
To The World

Yearn
for Paradise

Social

Ego

Connect
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Leave Mark
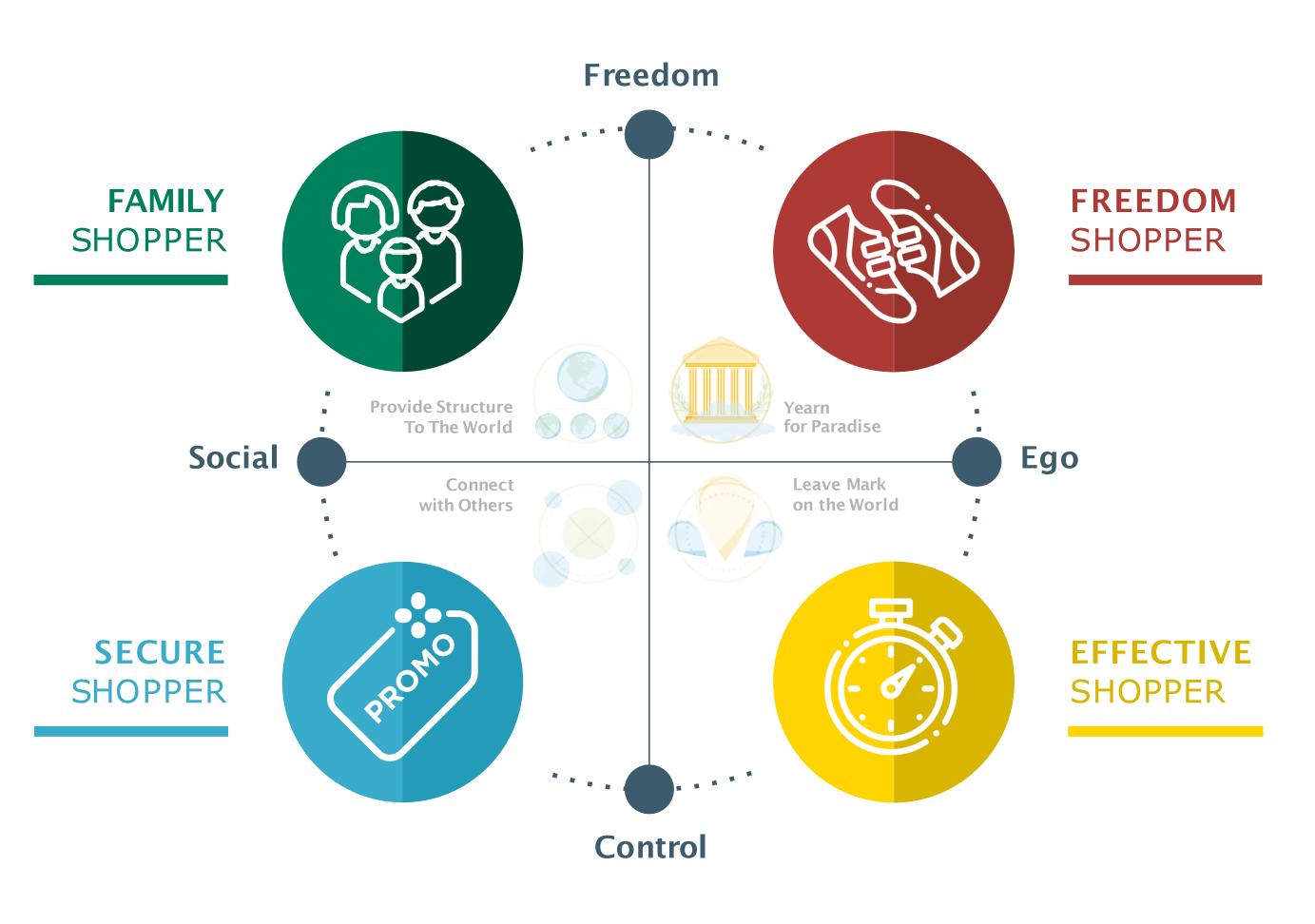on the World

Carl Jung's Theory?

This is where the process of dividing the shopping characteristics is undertaken using the theory.

Based on the interviews, the customer types consist of:

SECURE SHOPPER

PROMO

EFFECTIVE SHOPPER

Control

FREEDOM SHOPPER

Shopping activity, especially grocery shopping, is a fun activity that gives a happy or pleasurable effect. They use shopping as a "me time moment" or "therapy" to relieve stress or other problems. Those who belong in this group show similar personalities: cheerful, open, and warm. They also have the same hobby: shopping. They usually don't have a certain standard in terms of place and time to shop. This group of customers usually prefers to shop alone rather than with other people, because they will spend much of their time walking around and observing every product. This may be boring for some people. In addition, they prefer to enjoy the fun activity alone to give the effect of pleasure that can't be shared with others.

This group is the group that seeks experience in every shopping process. They prefer a place that does not only provide daily needs but also offer an experience of exploring a space so it can be a form of emotional therapy that make them feel better.

"I don't set the schedule for grocery shopping, I shop just whenever I feel like it. Whenever I'm bored, I shop. For instance, if I spot a supermarket while going out with my family, I'd go in. For me, shopping is therapeutic, I feel happy after shopping…"

"For me, shopping is fun. It's my "me-time" moment. The kids are with my husband, so I browse around and buy things by myself. It feels like happiness.."

FAMILY SHOPPER

A group of customers that states that shopping is not just an activity to fulfil daily needs but also a family recreational activity. This group involves their family in deciding everything, from the shopping place to deciding which product or item to purchase. Unlike the Freedom Shopper group that shops for pleasure, the Family Shopper group includes their family members in grocery shopping experience. Some of them even take their kids grocery shopping and have them helping choosing the products by creating various fun games, making grocery shopping with children delightful.

"I always bring the children and husband around. We always go anywhere together as a family. So whenever we go for grocery shopping, we use the moment to hangout together too. Sometimes the kids use their rollerblades inside a mall, so I let them help me picking up the items on our list."
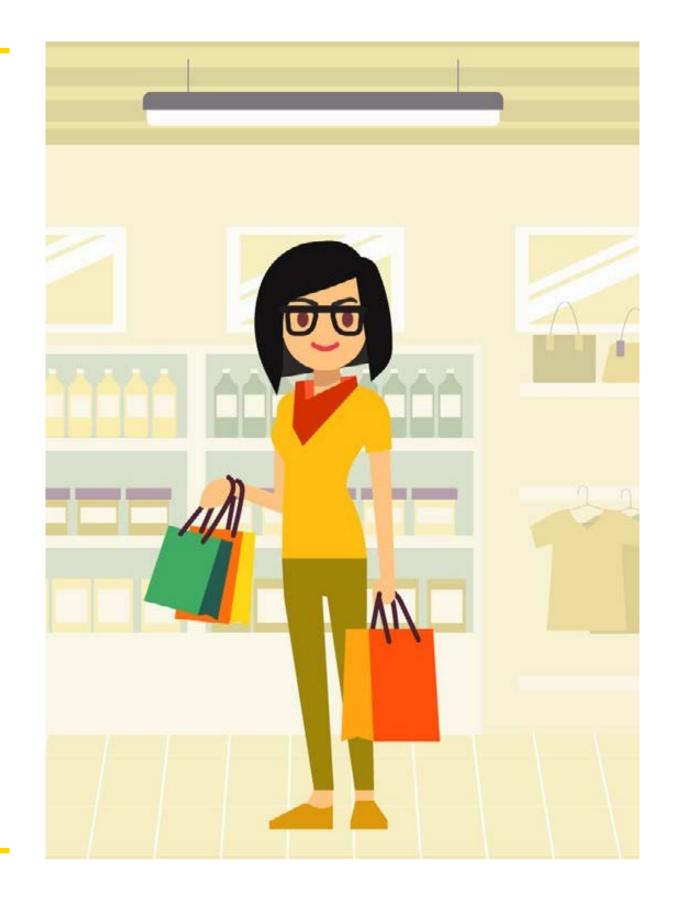
EFFECTIVE SHOPPER

A group of customer that finds grocery shopping another boring routine, also considers it as a burden. They are not enthusiastic about the shopping day, because it has become a boring monthly ritual. This thinking affects their behaviour during shopping.

This group treats shopping like they are on a mission. They come to the super/hypermarket to buy things they really need without exploring or walking around the aisles to browse every product.

Based on the in-depth interview, this group has similar characteristics of efficient, thorough, and assertive. They are the people who consider time and energy as very important, especially those who play multiple roles in their daily life, such as working and looking after the children. Lack of spending time with their family appears to be the reason that makes them reluctant to spend a lot of time outside the house, especially for shopping. In addition to effectively use their time, they are also efficient about the things they own and space they have. They don't like keeping too many items at home due to not enough space or don't want to go through a pile of possibly unused items in the future. Therefore, they tend to buy only necessary items, hence their shopping schedule is determined by which supplies have finished.

"I usually shop when we have run out of something, because I don't like stocking items at home. There's just no place. Moreover, I'm afraid to double buy. For instance, last month I bought soaps, lots of soaps, then I forgot and ended up buying more soaps, so I don't want to buy it again for couple of months. But the expiry date is getting closer, so in the end I have to throw them away."

"Shopping needs to be fast, just take what's needed. I don't like walking around. When it comes to taking a stroll, we can do it at a park. Instead of wasting time at a mall, I prefer to stay at home and play with the kids."

SECURE SHOPPER
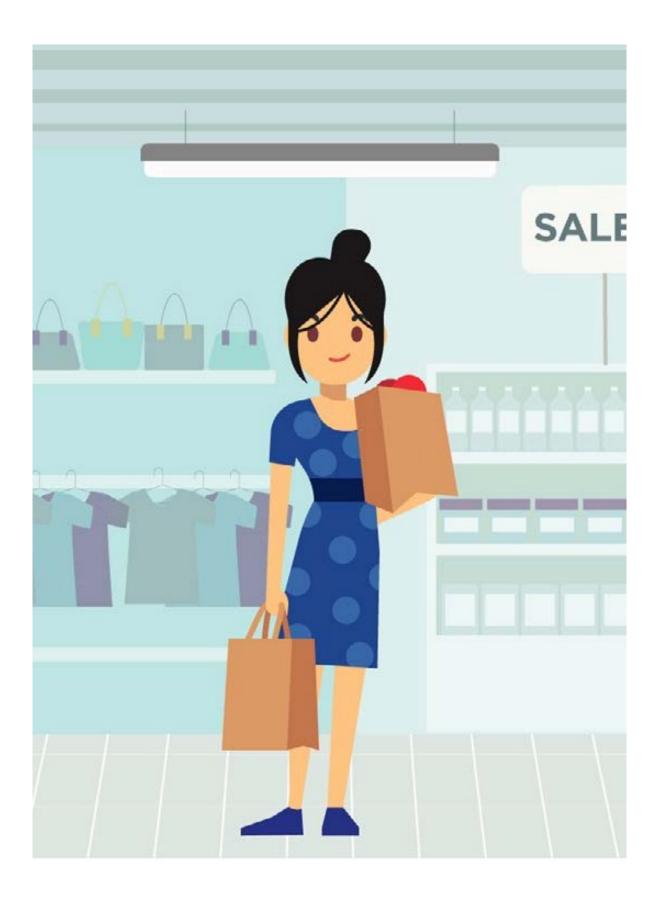
A group of customers that considers shopping as not only a routine activity to fulfil daily needs but also an activity to optimize their spending to get good and quality items. Therefore, they will buy items at below average price or look out for any promotions to achieve this goal. To this group, getting items at below average price is something they are proud of because they can protect the family from over-spending due to excessive shopping. This groups has no preference for brand-name products. As long as the items have the same function and at below average price, they will buy it. In addition, they also like to search for promo information in the catalogues, banners, from other people, or by visiting the super/hypermarket's website.

"I look for the cheapest, because the function is the same, right? For instance, this soap and that soap have the same fragrance and both are used for showering. So it's not a big deal."

"In-store promo is my favourite, especially when there's product bundling, I can get a lot of items for only a hundred thousand. That way, I can save the money for other things, such as fruits or foods like nugget, etc."

|	FREEDOM SHOPPER	FAMILY SHOPPER	EFFECTIVE SHOPPER	SECURE SHOPPER
Definition of Shopping	Fun activity that gives a pleasure effect. They use shopping as a "me time moment" or "therapy" to relieve stress or other problems. For this type of shopper, coming to a supermarket just to take a walk and look for new products are exciting and very fun.	An activity to fulfil daily needs but also a family recreational activity. This group involves their family in every shopping process, such as choosing the items, looking for the items, and pay for the purchase. For this group of customers, family plays a main role in deciding and determining each shopping process.	Finds grocery shopping another boring routine, even considers it as a burden that should be finished as soon as possible. This group treats shopping as a mission that has to be completed immediately.	Activity to optimize spending to get the best items. They prefer more affordable items or products or look for in-store promo or discount to optimize their monthly spending.
Shopping Place Preference	Comfortable (not too crowded, spacious). Since shopping is an act of relaxation, they prefer to choose a place that….......	Comfortable, not only for themselves, but also their kids. They prefer a more spacious place so the children can move freely.	Close to home, or on the same way to home or workplace. They tend not to like very spacious place, because to them, shopping is completing a mission as fast as possible.	The one that offers items at affordable prices or offers many in-store discounts as well as promo.
Shopping Experience Sought	• **Therapy or "me-time"** by walking along the aisles and looking at every product. • **Update on new products,** finding interesting, unique, and not-yet-available-on-the-market items or products.	• **Recreation; Bonding with family**, involving family in every shopping process (asking the children to pick up the items and put those in a cart or basket)	• **Shop fast** so they can do other things (for working people: shop fast so they can have more time with the family at home ; for **stay-at-home-mom:** shop fast so they can do chores)	• **Shop cheap**, so they can reduce their monthly spending.
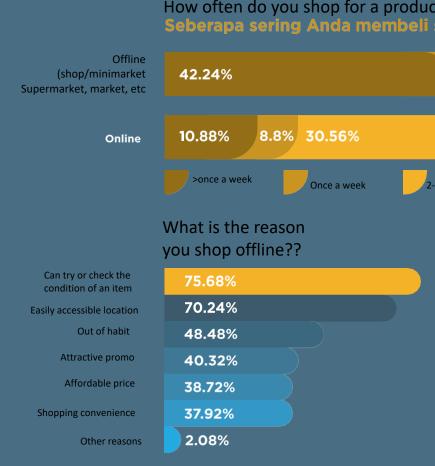
The presence of minimarkets doesn't necessarily make customers leave super/hypermarkets. Nowadays, customers are able to divide the occasion: events or activities that make them shop at minimarket or super/hypermarket. Customers divide their shopping place as follows:

1. Minimarket as a place to buy various complementary items or snacks.
2. Super/hypermarket as a place to buy grocery products with long shelf life that can be bought in bulk.

Take a Wider View of the Customers

After identifying the characteristics, motives, and behaviour of each personality through in-depth interviews, the next question is what is the composition of these groups in the population?

Do You Know? Millennials Shop Offline More Often Than They Shop Online

How often do you shop for a product online or offline?
Seberapa sering Anda membeli suatu produk secara Online maupun Offline?

| Offline (shop/minimarket Supermarket, market, etc | 42.24% | 20.8% | 20.32% | 6.9% | 9.8% | 1.44% |
| Online | 10.88% | 8.8% | 30.56% | 16.8% | 31.52% | |
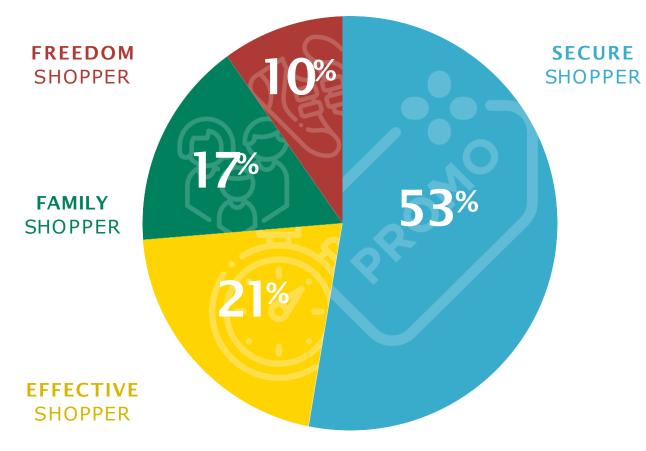
>once a week | Once a week | 2-3 times a month | Once a month | Randomly | Never

What is the reason you shop offline??

Can try or check the condition of an item	75.68%
Easily accessible location	70.24%
Out of habit	48.48%
Attractive promo	40.32%
Affordable price	38.72%
Shopping convenience	37.92%
Other reasons	2.08%

What is the reason you shop online?

Attractive promo	71.20%
Goods can be delivered to a desired place	68.16%
Accessible/practical	56.64%
Many choices of Seller & items	55.20%
Affordable price	48.64%
Out of habit	14%
Other reasons	1.28%

Indomaret	85.12%
Alfamart	81.92%
Carrefour/Transmart	53.60%
Alfamidi	48.64%
Hypermart	42.56%
Matahari Dept. Store	39.2%
Giant	39%
Super Indo	33.28%
Ramayana Dept Store	26.24%
Lottemart	25.6%
Ace Hardware	19.68%
Centro Dept. Store	8.96%
Metro Dept. Store	8.16%
Electronic City	8.16%
Electronic Solution	6.88%
Lain-lain	6.2%

Millennials Shop *Online* vs *Offline*

When comparing the online vs offline shopping activity, it appears that 42.24% of millennials shop offline for more than once a week. Meanwhile, they shop online occasionally or around 2-3 times a month. They choose to shop online because they want to make sure the quality of the item they're about to purchase is great. In addition, they also like to shop offline due to the easily accessible location. Online shopping is chosen as an alternative to get attractive promo.

Millennials who make offline purchase turn out to enjoy shopping for daily necessities retail items at the minimarkets, namely Indomaret and Alfamart. Indomaret has the highest rank, chosen by 85% of the respondents. Alfamart comes close in second, chosen by 82% of the respondents.

To answer the question, we conducted a survey to 1,302 respondents. The survey result illustrated that in Jabodetabek area, customers with Secure Shopper type are dominating the total population (53%) compared to the other three types.

PERSONALITY

FREEDOM SHOPPER
10%

FAMILY SHOPPER
17%

EFFECTIVE SHOPPER
21%

SECURE SHOPPER
53%
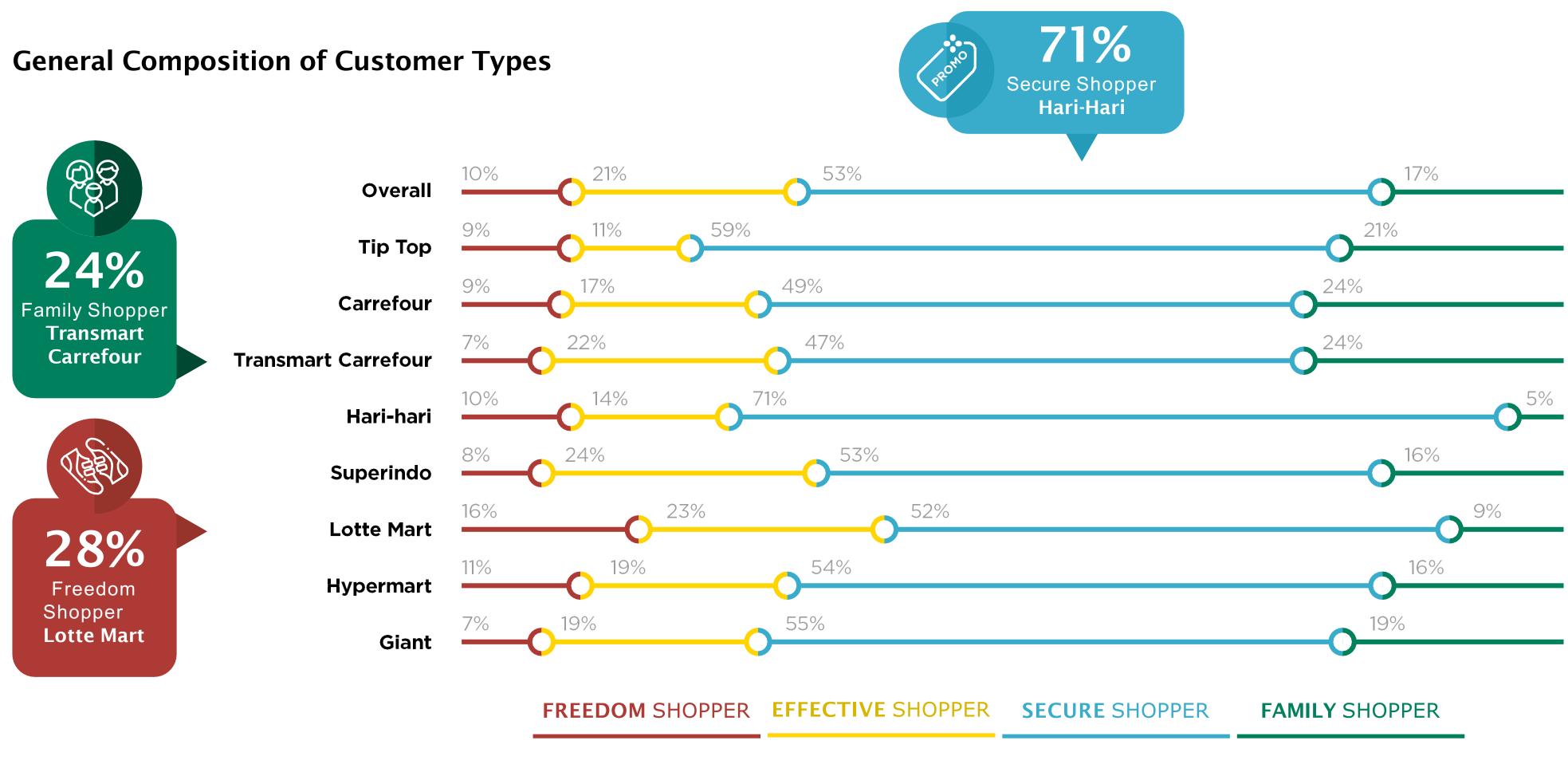
Survey results of 1,302 respondents

The data sufficiently explains that for most of Jabodetabek residents, shopping is an effort to optimize expenditure to get items with the best quality and price. This data is in line with the rising popularity of stores that offer discounts or promo. From in-depth interview, several respondents admit that price and discount are few of the reasons in choosing shopping place.

Several respondents also believe that groceries shopping is repeating activity that has been done for years, resulting in loss of enthusiasm.

They no longer look for enthusiastic experience when shopping. Shopping is more of a routine to fulfil daily needs. Moreover, there is also the issue of the rising cost of living such as

"The place is chosen because it's the cheapest compared to other super/hypermarkets. I have shopped for many years, and when I found the cheaper one, I go there."

expensive school fees, home instalment, and transportation cost. These are Secure Shopper's motivation in shopping to control excessive spending.

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General Composition of Customer Types

71%
Secure Shopper
Hari-Hari

24%
Family Shopper
Transmart Carrefour

28%
Freedom Shopper
Lotte Mart

	Freedom	Effective	Secure		Family
Overall	10%	21%	53%		17%
Tip Top	9%	11%	59%		21%
Carrefour	9%	17%	49%		24%
Transmart Carrefour	7%	22%	47%		24%
Hari-hari	10%	14%	71%		5%
Superindo	8%	24%	53%		16%
Lotte Mart	16%	23%	52%		9%
Hypermart	11%	19%	54%		16%
Giant	7%	19%	55%		19%

FREEDOM SHOPPER   **EFFECTIVE** SHOPPER   **SECURE** SHOPPER   **FAMILY** SHOPPER

After understanding the general composition of customer types, the next step is to dig deeper into the personality composition in each super or hypermarket brand. According to the data, the personality patterns in each brand tend to be similar with the general composition: Secure Shopper is always larger than the other 3 types.

The data show that there are at least 3 brands that have different composition patterns, namely: Hari-Hari, Lotte Mart, & Transmart Carrefour. The composition of customer types in Hari-Hari is dominated by Secure Shopper, which is way higher than the rests. The qualitative research finds that Hari-Hari is strongly regarded as a store that offers products at relatively below average price. The appearance of Hari-Hari in Bekasi Cyber Park is able to bring customers from Cibitung, Cikarang, Babelan, and Tambun.

Various in-store promotions and discounts are able to attract customers to come, even though they don't live near the location.
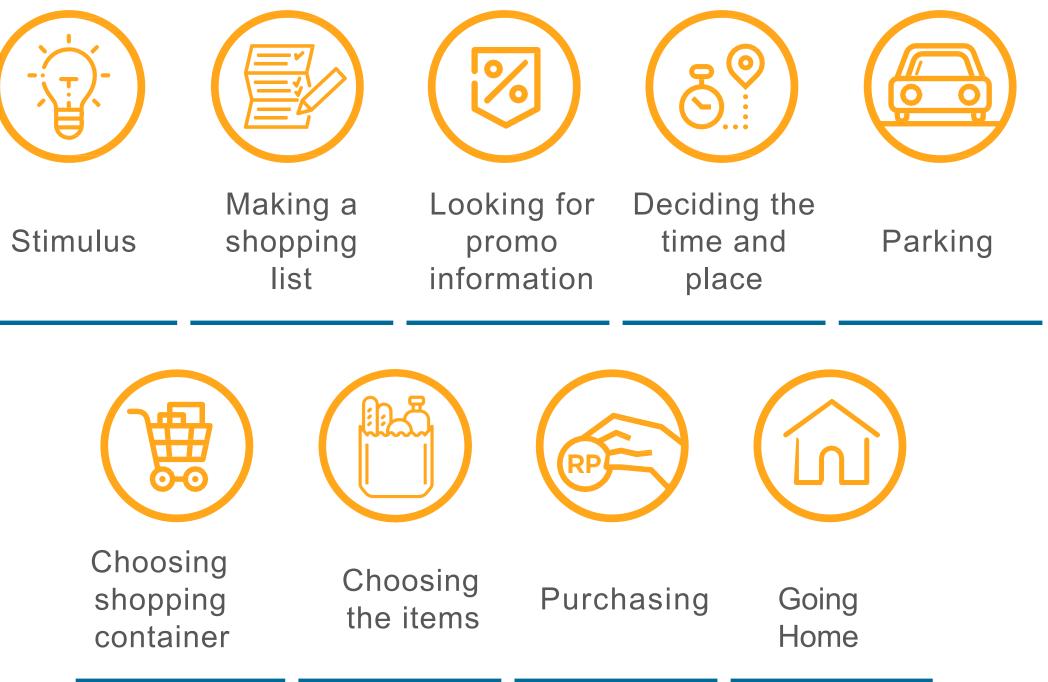
Meanwhile, the percentage of Freedom Shopper personality shop at LotteMart is higher than that of in the other four shopping places. Based on the interview result, LotteMart is one of the super/hypermarkets that does not only offer groceries, but also give customers a pleasant shopping experience. The availability of imported products at relatively affordable price, wide aisles, sufficient lighting, and air conditioner are able to satisfy Freedom Shopper's desire to browse new, unique, and interesting products.
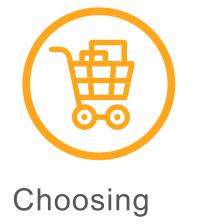
Another interesting thing is Carrefour and Transmart Carrefour are dominated by Family Shopper in which most of them are married men with children. These men feel that a spacious and fun playground is the best place to bond with their family, especially the children, while waiting for their wife to shop.

Part 02
Understanding Customer's Shopping Experience

Journey of Conventional Customer

Based on the qualitative and quantitative interview, we find the relation of personalities to shopping experience. Different motivations will certainly result in different behaviors. Therefore, we list the description of monthly shopping behavioral pattern of the consumers.

Stimulus

Making a shopping list

Looking for promo information

Deciding the time and place

Parking

Choosing shopping container

Choosing the items

Purchasing

Going Home
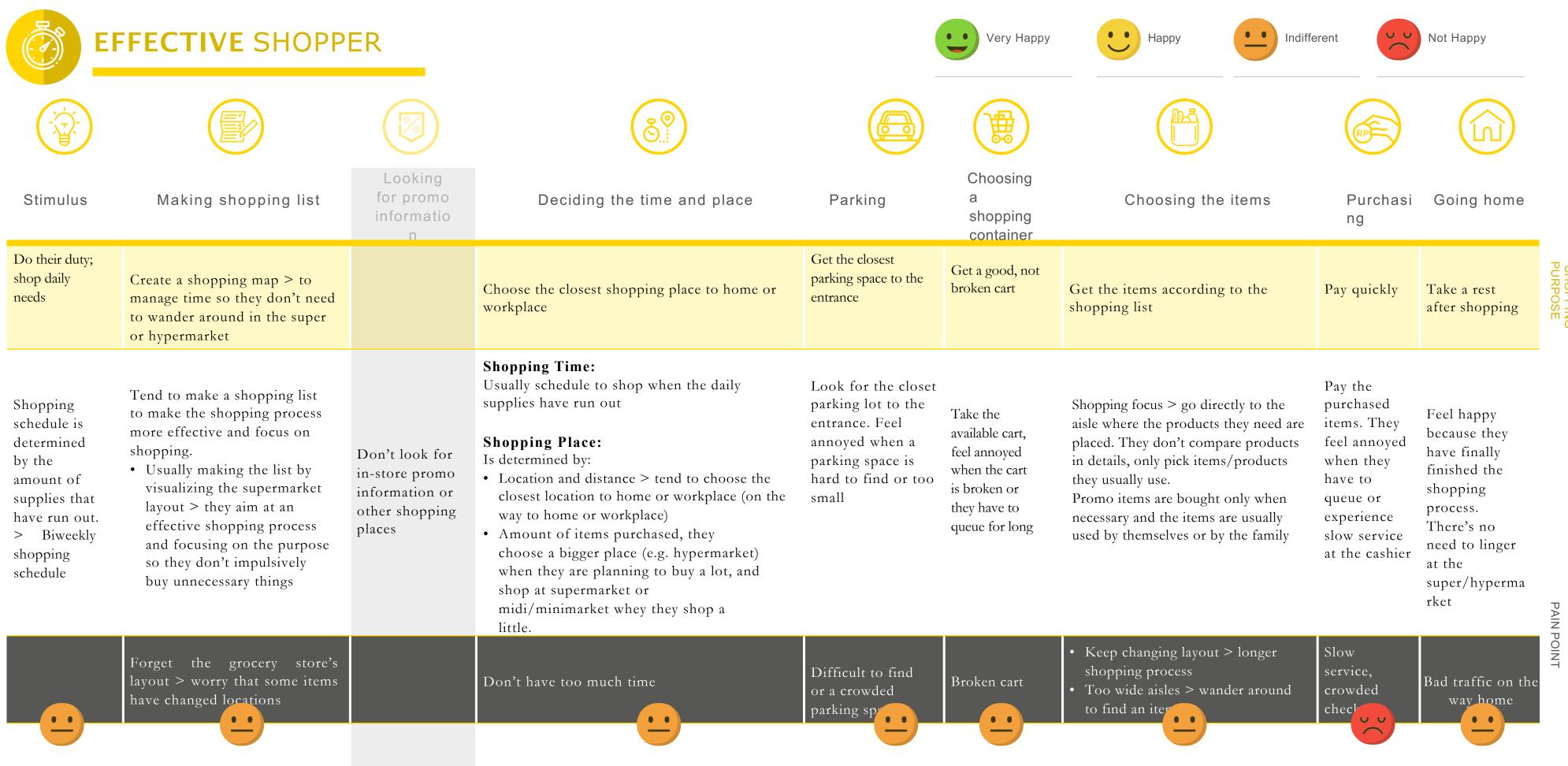
Despite the shopping pattern similarity, each personality experiences different things in their journey.

In general, customer's journey map shows the same journey pattern. It starts with a trigger or stimulus and ends with going home.

The two personality groups in the freedom line, Freedom Shopper and Family Shopper, consider shopping as a matter of pleasure, hence they think each process is a fun experience. They like to treat shopping as a special moment so they always finish other activities first prior to shop. For example, they prefer to eat before shopping so their shopping process won't be interrupted by a hungry belly.

This is different to those in the control line. They want to make an effective (time and cost wise) shopping process so they don't have to spend too much time outside the house or make unnecessary spending.

In addition, the most striking finding is the behaviour inside the super/hypermarket. Freedom Shopper and Family Shopper groups find wandering around the aisles entertaining as it gives them a sense of satisfaction because they feel so good after doing window shopping and spending time with their family together. However, to those belong the Effective Shopper and Secure Shopper groups, shopping an activity of leisure but a task that must be completed effectively, both in time and cost. They tend to focus on completing the task so they abandon the process of wandering around.

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FREEDOM SHOPPER

Legend:
- 🙂 Very Happy
- 🙂 Happy
- 😐 Indifferent
- ☹️ Unhappy

	Stimulus	Making shopping list	Looking for promo information	Deciding the time and place	Eating before shopping	Parking	Choosing a shopping container	Choosing the items	Purchasing	Going home
SHOPPING PURPOSE	Shop out of boredom, when they are stress, or to enjoy "me time" moment			Determine the place according to their needs: a place for stress relief is different to a place for grocery shopping	On a full stomach so it doesn't interrupt the shopping process	Get a parking space inside the super/hypermarket	Get a good, not broken cart	• Buy necessary items • Check on updates on new products • Wander around > stress relief	Pay for the purchased items	Arrive home happy> no more stress/boredom
	Random, usually when they have run out of things or triggered by other things: • Stress • Boredom • Want to try a new place	Tend not to make a shopping list since the desire to shop comes unexpectedly	Don't look for in-store promo information, but usually look for information on new shopping place or new products	**Shopping Time:** Random, when they are bored or stress, or when they have run out of things **Shopping Place:** Random, depending on their personal condition. They go to Place A when they are bored, Place B when they need something, Place C when they're with family	Finish other activities first, such as eating so it won't interrupt their shopping process	Park their car in the designated place, location doesn't matter to them	Take the available cart, it doesn't matter even if they have to queue for the cart or change the broken cart	• Randomly wander around the aisles, depending on their mood • Go through every aisle even though they don't buy anything because they just want to see current updates or latest product trends • They tend to buy a new item despite lack of knowledge of the features or benefits	Pay for the purchased items. They have no problem in queuing	Happy because they feel refreshed (no more boredom or having a "me-time" moment)
PAIN POINT				Don't have enough time despite the desire to shop	There's no decent eating place near the shopping place	Difficult in finding a parking space is not a big deal	Wait for the cart is not a big deal	No new items to look for, Narrow aisles	Queue > but it's not a big deal	Bad traffic
	☹️			🙂	🙂	🙂	🙂	🙂 (green)	🙂	🙂
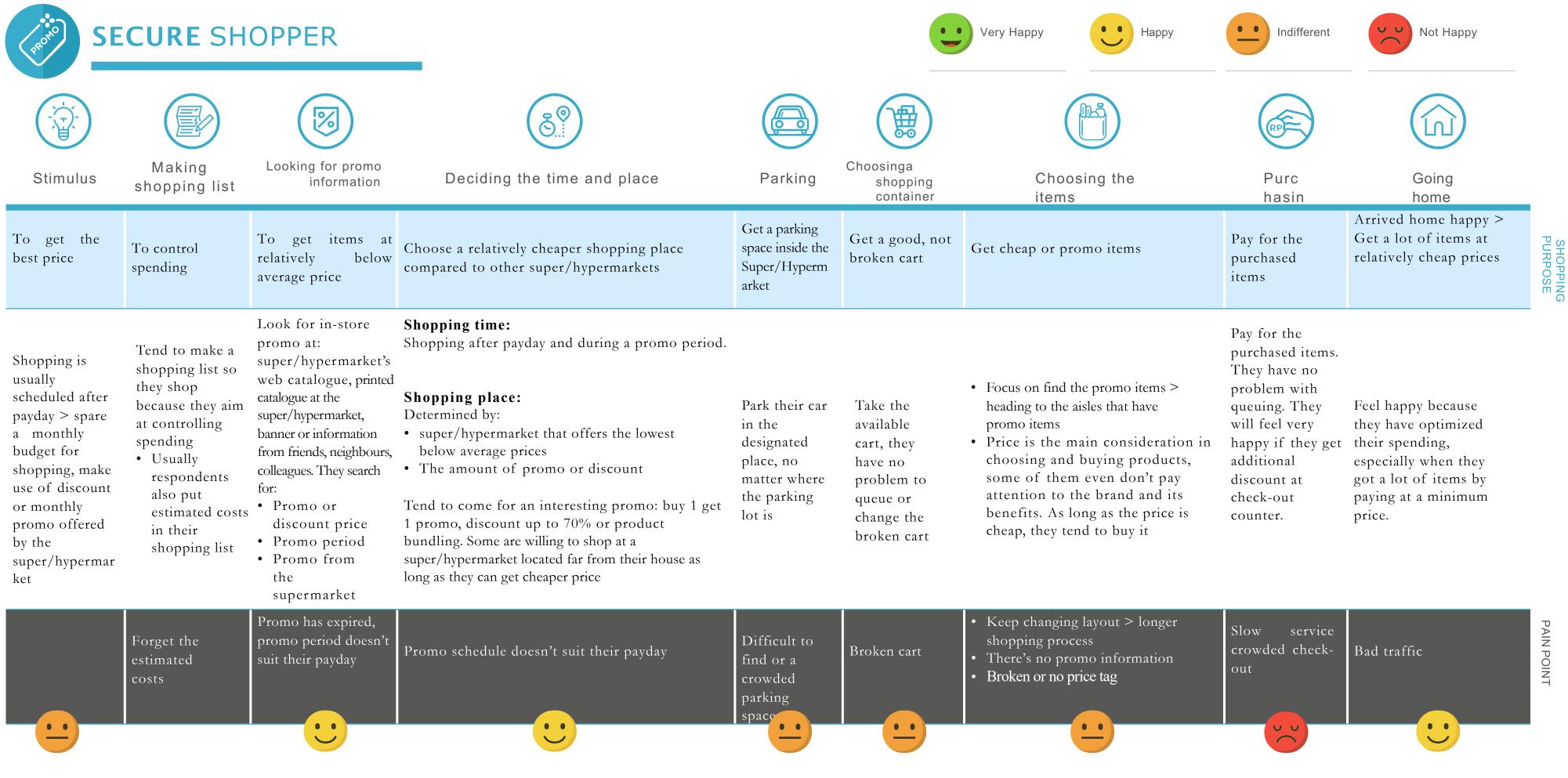
= Freedom Shopper does not make shopping list or look for information before shopping

EFFECTIVE SHOPPER

Legend	
🙂 Very Happy	🙂 Happy
😐 Indifferent	🙁 Not Happy

Stimulus	Making shopping list	Looking for promo information	Deciding the time and place	Parking	Choosing a shopping container	Choosing the items	Purchasing	Going home

SHOPPING PURPOSE

Do their duty; shop daily needs	Create a shopping map > to manage time so they don't need to wander around in the super or hypermarket		Choose the closest shopping place to home or workplace	Get the closest parking space to the entrance	Get a good, not broken cart	Get the items according to the shopping list	Pay quickly	Take a rest after shopping

Stimulus	Making shopping list	Looking for promo information	Deciding the time and place	Parking	Choosing a shopping container	Choosing the items	Purchasing	Going home
Shopping schedule is determined by the amount of supplies that have run out. > Biweekly shopping schedule	Tend to make a shopping list to make the shopping process more effective and focus on shopping. • Usually making the list by visualizing the supermarket layout > they aim at an effective shopping process and focusing on the purpose so they don't impulsively buy unnecessary things	Don't look for in-store promo information or other shopping places	**Shopping Time:** Usually schedule to shop when the daily supplies have run out **Shopping Place:** Is determined by: • Location and distance > tend to choose the closest location to home or workplace (on the way to home or workplace) • Amount of items purchased, they choose a bigger place (e.g. hypermarket) when they are planning to buy a lot, and shop at supermarket or midi/minimarket whey they shop a little.	Look for the closet parking lot to the entrance. Feel annoyed when a parking space is hard to find or too small	Take the available cart, feel annoyed when the cart is broken or they have to queue for long	Shopping focus > go directly to the aisle where the products they need are placed. They don't compare products in details, only pick items/products they usually use. Promo items are bought only when necessary and the items are usually used by themselves or by the family	Pay the purchased items. They feel annoyed when they have to queue or experience slow service at the cashier	Feel happy because they have finally finished the shopping process. There's no need to linger at the super/hypermarket

PAIN POINT

😐	Forget the grocery store's layout > worry that some items have changed locations 😐		Don't have too much time 😐	Difficult to find or a crowded parking space 😐	Broken cart 😐	• Keep changing layout > longer shopping process • Too wide aisles > wander around to find an item 😐	Slow service, crowded check 🙁	Bad traffic on the way home 😐

= Effective Shopper focuses more on their shopping list rather than promo information

SECURE SHOPPER

😀 Very Happy 🙂 Happy 😐 Indifferent ☹ Not Happy

	Stimulus	Making shopping list	Looking for promo information	Deciding the time and place	Parking	Choosing a shopping container	Choosing the items	Purchasin	Going home	
SHOPPING PURPOSE		To get the best price	To control spending	To get items at relatively below average price	Choose a relatively cheaper shopping place compared to other super/hypermarkets	Get a parking space inside the Super/Hypermarket	Get a good, not broken cart	Get cheap or promo items	Pay for the purchased items	Arrived home happy > Get a lot of items at relatively cheap prices
	Shopping is usually scheduled after payday > spare a monthly budget for shopping, make use of discount or monthly promo offered by the super/hypermarket	Tend to make a shopping list so they shop because they aim at controlling spending • Usually respondents also put estimated costs in their shopping list	Look for in-store promo at: super/hypermarket's web catalogue, printed catalogue at the super/hypermarket, banner or information from friends, neighbours, colleagues. They search for: • Promo or discount price • Promo period • Promo from the supermarket	**Shopping time:** Shopping after payday and during a promo period. **Shopping place:** Determined by: • super/hypermarket that offers the lowest below average prices • The amount of promo or discount Tend to come for an interesting promo: buy 1 get 1 promo, discount up to 70% or product bundling. Some are willing to shop at a super/hypermarket located far from their house as long as they can get cheaper price	Park their car in the designated place, no matter where the parking lot is	Take the available cart, they have no problem to queue or change the broken cart	• Focus on find the promo items > heading to the aisles that have promo items • Price is the main consideration in choosing and buying products, some of them even don't pay attention to the brand and its benefits. As long as the price is cheap, they tend to buy it	Pay for the purchased items. They have no problem with queuing. They will feel very happy if they get additional discount at check-out counter.	Feel happy because they have optimized their spending, especially when they got a lot of items by paying at a minimum price.	

| **PAIN POINT** | | Forget the estimated costs | Promo has expired, promo period doesn't suit their payday | Promo schedule doesn't suit their payday | Difficult to find or a crowded parking space | Broken cart | • Keep changing layout > longer shopping process
• There's no promo information
• **Broken or no price tag** | Slow service crowded check-out | Bad traffic | |
| | | 😐 | 🙂 | 🙂 | 😐 | 😐 | 😐 | ☹ | 🙂 | |

FAMILY SHOPPER

Very Happy   Happy   Indifferent   Unhappy

	Stimulus	Making shopping list	Looking for promo information	Deciding the time and place	Eating before shopping	Parking	Choosing a shopping container	Choosing the items	Pay	Go Home	
SHOPPING PURPOSE	Shopping as leisure			Choose a children and family-friendly shopping place	Full stomach, to prevent interruption on shopping process	Get parking inside super/ hypermarket	Get a good, not broken cart	• Buy needed items • Recreation with family	Pay for the purchased items	Arrived home feeling happy > quality family time	
	Shopping is usually scheduled after payday > also a family recreational activities	Tend not to a make shopping list, because: • They keep buying the same items/products so it has became a habit to buy those	Don't look for promo information but usually look for information on new shopping places or new products	**Shopping time:** After payday > usually on holiday right after payday so everyone in the family can join the activity. **Shopping place:** Decided by all family members. They usually choose a enjoyable place for the whole members. The discussion involves all family members to choose the time and place to shop	Finish other activities first, such as eating so it won't interrupt their shopping process But some of them choose to eat after shopping	Park their car in the designated place, location doesn't matter to them	Take the available cart, it doesn't matter even if they have to queue for the cart or change the broken cart	• Go through every aisle, but prioritizing the ones with the items they need • Choose an item after they got everybody's approval • Pick up and put the grocery item in the trolley becomes a fun activity > the mother ask the children to get involved in picking up the items • When there's a promo, they tend to discuss it with the family first. They will buy it if they like it	Pay for the purchased items. They have no problem in queuing	Feels happy because they have spent time with family.	
PAIN POINT				Don't have enough time despite the desire to shop	There's no decent eating place near the shopping place	Difficult in finding a parking space is not a big deal	Wait for the cart is not a big deal	Non-children-friendly shopping place: glassware within children's grasp, the aisles are too narrow to walk with family, no nursery room	Queue > but it's not a big deal	Bad traffic	

= Family Shopper does not make a shopping list or look for promo information before shopping

The Difference in Responding to Services Provided During the Shopping Process

Each personality does not only show different shopping map interpretation, but also different tolerance levels when they have to face certain events or services provided by super/hypermarkets.

The keep changing shelves

For Freedom and Family Shoppers, this is not a problem and it does not interfere their shopping experience.

On the contrary, Effective and Secure Shoppers consider this an annoying thing.

According to the Effective Shopper, the keep changing shelves disturb their planned shopping map, hence their shopping process loses its focus.

The keep changing shelves require them to wander around the aisles to search for the items they need.

Likewise with the Secure Shopper, the keep changing shelves cause them to lose focus in looking for promo because they have to adapt with the new shelving system. Oftentimes they will leave the super/hypermarket and look for other shopping place that can cater to their needs.

Crowded parking space

Freedom Shopper, Secure Shopper, and Family Shopper types consider this situation normal. On the contrary, the Effective Shopper thinks this as a disadvantage because it means they waste more time for grocery shopping.

Broken cart

For the Effective Shopper, this is a significant obstacle because it interferes the shopping process. A broken cart means longer shopping process.
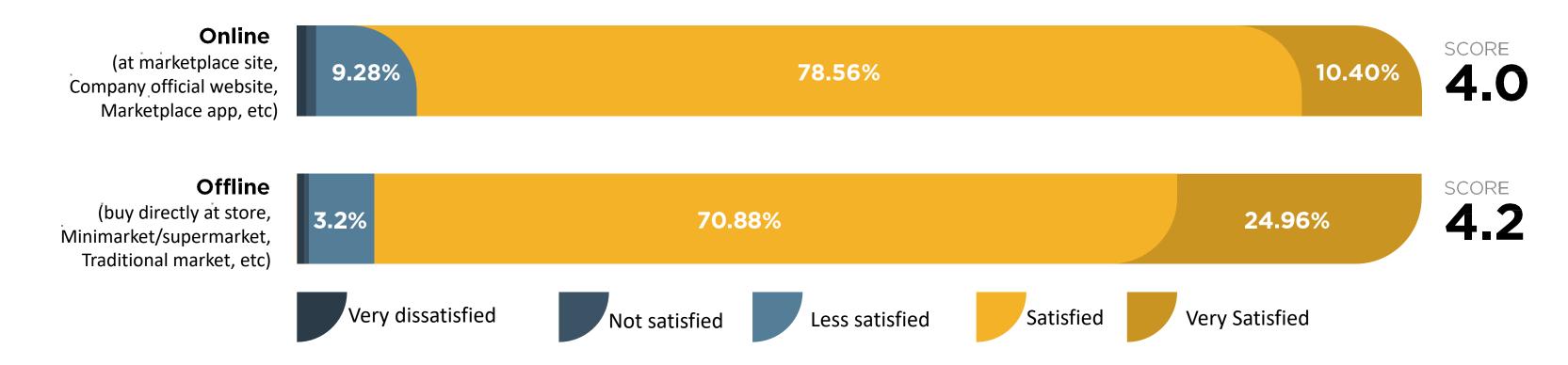
Wide aisle

The most favourite thing of Freedom and Family Shoppers because they can wander around, refresh themselves, and get updates on many items.

However, the Effective Shopper type can't tolerate wide aisle because a huge aisle makes their shopping process lose its focus.

How satisfied are you when buying a product online or offline?

Online
(at marketplace site,
Company official website,
Marketplace app, etc)

9.28% | 78.56% | 10.40%

SCORE
4.0

Offline
(buy directly at store,
Minimarket/supermarket,
Traditional market, etc)

3.2% | 70.88% | 24.96%

SCORE
4.2

Very dissatisfied | Not satisfied | Less satisfied | Satisfied | Very Satisfied

Although Millennials feel satisfied when shopping online or offline, a long queue at the checkout counter makes them reluctant to shop at a Store/Mall/Market.

From the research result, we find that Millennials' satisfaction when shopping offline and online are equally big, with that of shopping offline is still a bit ahead.

25% of respondents say "Very satisfied" when making offline purchases. However, a long queue at the checkout counter (52%) seems to be the pain point of offline purchase and the main reason why customers are reluctant to shop at a conventional store.

In the end, some customers will search for other alternatives in purchasing groceries, such as by shopping online. Otherwise, they still choose to buy daily items at a conventional store knowing that they have to spend more time waiting in line.

How Is The Quality of Grocery Shopping Experience?

To improve the customer's shopping experience, we need to identify the quality of the experience they have gained. The tool we need is called Shopper Experience (SX) Index. The three main components measured are:

1. Fulfilment of customer's needs
2. Ease of interaction
3. How fun the shopping experience is

To complement this data, we also use the general customer perception as indicated by Net Promotor Score. So, how do the customers in Jabodetabek view their groceries shopping experience?

Grocery SX Index

71

NET PROMOTE SCORE
-3.2

0-54	55-64	65-74	74-75	85-100
Very poor	poor	normal	Nice	Very good

"Nothing special, it's always like this every month. It's necessary so I need to buy the items."

"I can't say I'm happy. How to put it… It's just normal. Every month I buy the same items over and over again."

From the data, shopping experience is regarded as something normal. This is not surprising considering grocery shopping is a routine and repetitive process. Purchased products are also similar: groceries (rice, oil, sugar, coffee, eggs, and so on), toiletries, facial and skin care, also medicines.

What is the effect of repetitive activity? It is is easy to forget. They regard each process as a habit so when they try to

recall the shopping experience, they think of it as a mundane habitual activity. Some of them are not able to feel the experiences offered by a super/hypermarket. Some of them say everything feels nothing special. They are no longer able to decide whether it is satisfying or dissatisfying. However, it doesn't generally apply to all customers as there are differences when each customer assess their shopping experience.

Which Type Is The Most Dissatisfied With Their Shopping Experience? The Effective Shopper.

This is easy to understand given the mundane to unpleasant feelings always accompany their shopping activity. Therefore, it is hard to get a high score from this group of people because it is also difficult for them to feel happy and satisfied after going through the shopping process.

Experience Index

0-54	55-64	65-74	74-75	85-100
Very poor	poor	normal	Nice	Very good

Net Promoter Score

Which Shopping Lover Type Tends To Rate Higher Than Average? The Freedom Shopper.

This type is easier to "please" than the other types. That is why they also have the desire to recommend a shopping place as seen on the Net Promoter Score.

We can see that only one type of people considers their shopping experience as enjoyable. So, it is necessary to find out what needs to be improved to increase their Experience Index. This can be done by digging dipper into the journey process as well as identifying emotions and pain points of each journey as described earlier.

StratX**insight**

SX Experience Index

Brand	Score
Tip Top	75.5
Hypermart	75.3
Transmart Carrefour	72.9
Glant	71.9
SuperIndo	71.1
Carrefour	68.9
Lotte Mart	66.7
Harl-harl	62.5

Axis: 20 · 10.0 · 20.0 · 30.0 · 40.0 · 50.0 · 60.0 · 70.0 · 80.0

0-54	**55-64**	**65-74**	**74-75**	**85-100**
Sangat jelek	Jelek	Biasa	Bagus	Sangat Bagus
Very poor	poor	normal	Good	Very good

Let's Serve Our Customer with Better Experience

CONCLUSION

From the eight groceries brands measured, only two brands manage to get a "Nice" index, the rests are considered normal. Unfortunately, the "Nice" score is still on the lower class limit (75), so no brand is really able to provide a satisfying shopping experience to the customers. This is an opportunity for retail groceries players to start improving current shopping experience in order to be able to survive and even grow in the disruption era.

StratX insight

Thank you and don't hesitate to contact us.

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