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*Are you ready?*



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## ***4 things we'll discuss today...***

***1. Define who will you be, where will you play***

***2. Winning from Within***

***3. Become 'data translators' to stay relevant***

***4. Change the who and how of partnerships and collaboration***

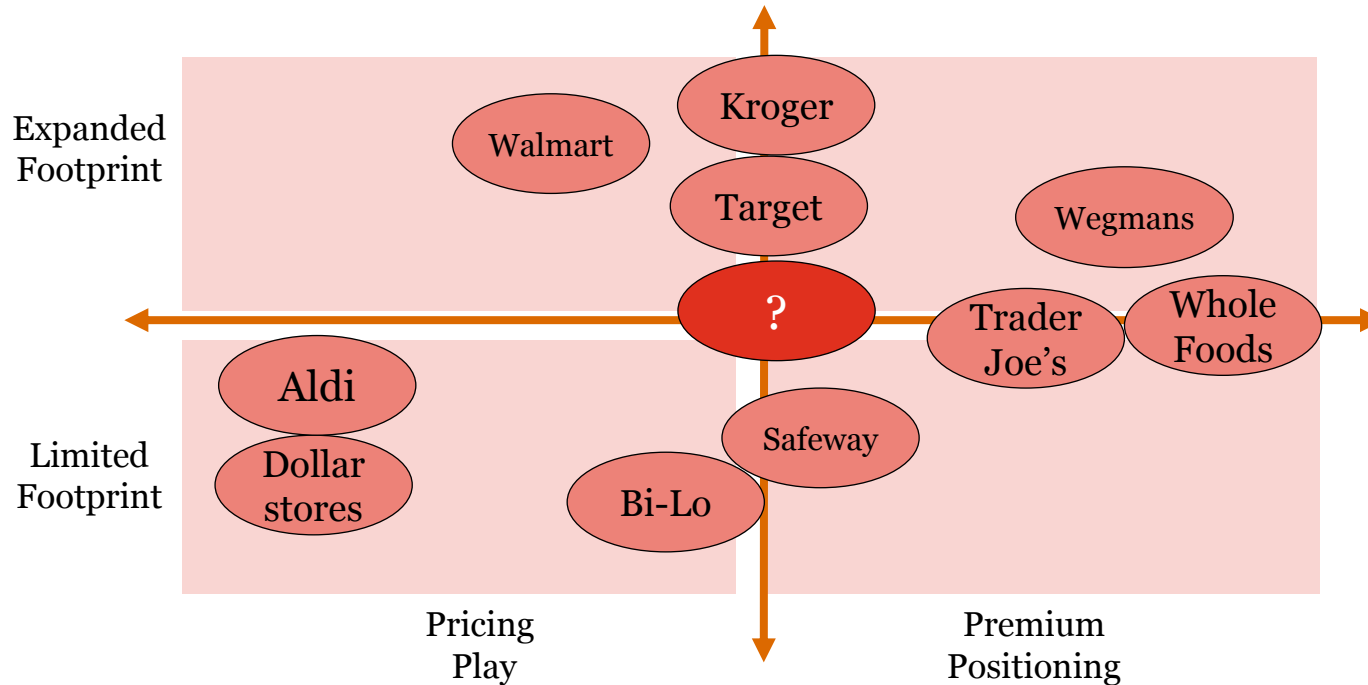
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## ***Getting ready...beyond the table stakes***

### **1. Define what will you be, where will you play**

- Building ‘your brand’ for the new world
- Taking a ‘polarized’, differentiated position – products, services, lifestyle solutions
- Committing to experiment and innovate across the board
- Becoming the best conversationalist and personalize for ‘me’

# *A significant component of growth comes from knowing where to play*



## *Experience will drive loyalty*



# Invest in knowing key customers really well....why do they chose you over others

1



**Experiential  
Erica**

2



**Traditional  
Terri**

3



**Mindful  
Maria**

4



**Frugal  
Fred**

## Who They Are

- Affluent
- Educated
- Mid 40s and 50s

- Most elderly
- Retired
- Married
- Live in small suburbs

- Youngest segment
- Single urbanites

- Middle aged
- Middle income segment
- Half have families who reside in the suburbs

## What They Want

- **Premium** shopping experience
- **Knowledgeable** employees
- **Wide product** selections
- Happy to switch grocers who **go the extra mile**
- **Spreads the word**

- **Doesn't care for digital** or specialty frills
- Enjoys **simple** and **conventional** ways of shopping
- **Conventional products**
- **Help** at checkout

- **On-the-go**
- Order groceries **online**
- Values **preplanned meals**
- Wants **mobile apps** to
- Instantly check-out via **self scanning**
- **Coupons**

- Grocery shopping as a **chore**
- Shops typically **once a week**
- **Price** trumps all

## How to Serve

- **Most promising**
- Wide **range of specialty products**
- **Train staff**
- Leverage her **good word-of-mouth**

- Suits a **classic , traditional grocer**
- Invest in staff to help him
- Keep original products or **switch gradually**

- **Convenience**
- **Organic produce**
- Services ... **meal planning** and **delivery** services.

- **Efficient** grocery trips
- **Save time and money**
- Invest in **clear signage and sales**
- **Quick checkouts**

## Growing niches will require different strategies and capabilities

- **Millennial ‘Moms’**  
Seeking simple, smart, ‘for me’ lifestyle solutions, digitally
- **‘Man Aisles’**  
More than a third of all food shoppers likely to be men
- **‘Ethnic’ Shopper**  
With more diverse households food buyers will be looking for mixing traditional taste with convenience
- **‘Naturals’ Shopper**  
No to “fake” food. Food Transparency will be dominant theme amongst all shoppers
- **‘Mini Meals’ Shopper**  
Consumers will be looking for a la carte and mini meals for multiple occasions in the day and for specific needs (medical)



***The nature of selling food and food sellers is changing...having a well defined proposition will matter***

**Back to the Future Channels**

- ‘Food sharing neighborhood cooperatives’, Farmers’ markets, Food trucks, Mom n Pop stores

**Changing play of traditional channels**

- Convenience stores, Drug Stores will continue to expand their food business

**Specialist Channels**

- Medical facilities, Culinary organizations and Weight Management companies could extend their role to meet special needs of their clients

**New Players**

- Enabled by technology, brand loyalty and convenience – Growers, Manufacturers, Distribution Companies and Online retailers will compete for share of wallet



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## ***Getting ready...beyond the table stakes***

### **2. Win from within**

- Evaluating talent, who is missing from the future team
- Building a flexible, learning, social enterprise
- Building a game plan for Millennials, as employees (and as shoppers)
- Thinking about being opportunity centric structure vs operations centric (e.g. flexibility in resource allocation)
- Developing new performance metrics e.g. sales vs productivity

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## ***Getting ready...beyond the table stakes***

### **3. Become 'data translators' to stay relevant**

- Investing in the capability and technology. Make, buy or partner. Put a stake.
- Digitizing everything, cost of experimenting is low
- Mining shopper behavior data, it's a goldmine

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## ***Getting ready...beyond the table stakes***

### **4. Change the who and how of partnerships and collaboration**

- Developing a 'share, not take' market share mindset
- Redefining your partnerships and who you partner with – other grocers, technology companies
- Investing and partnering with 'Leaders'

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# *Thank you*

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