

OPTIMIZING OMNI-CHANNEL GROCERY SHOPPING: Marketing Communications Strategies for Independent Grocery Retailers

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Abstract

This study tests which incentives or messaging (if any) motivates consumers to start online grocery shopping with independent grocery retailers by applying the diffusion theory. Online grocery shopping is important to study because it has not been adopted as quickly as shopping online for other goods; however, the practice is expected by industry professionals, researchers, and grocers to grow quickly. Independent grocery retailers need to be studied because they compete in a crowded marketplace of traditional and non-traditional grocers like Amazon, Whole Foods Market, Walmart, and more; however, often are left out of research. By marketing an omni-channel retail strategy that includes online shopping with smart messaging and incentives, it is predicted that independent grocery retailers can continue to be successful instead of becoming a relic.

This study asks the research question: Which marketing messaging, incentives, or combination of messaging and incentives delivered through email have the greatest effect on consumers' decision to try online grocery shopping? This study answers this research question utilizing the diffusion theory through the testing of seven hypotheses. The testing consisted of an experiment using email marketing messages sent to an independent grocery retailer's customer email list. Following the completion of the email experiment, the participating customers received an additional email with a follow-up survey to further analyze the customers' attitudes towards online grocery shopping adoption.

The expected outcome predicted that emails with a combination of positive marketing messages and incentives will have a greater effect on adoption than emails

without these marketing communication tactics, and that the combination of online customer reviews and free online grocery shopping service incentive will have the greatest effect on adoption. Discovering which incentives and messaging are most successful in persuading consumers to try online grocery shopping is important to study because it can save grocers marketing time and money. This is especially true for independent grocery retailers who typically have less marketing resources in comparison to their larger counterparts.

Introduction

By 2022, the Food Marketing Institute predicts that 70% of Americans will grocery shop online, accounting for \$100 billion in consumer spending (FMI, 2018, p. 3). In order for independent grocery retailers to continue to compete against their larger, corporate counterparts like Amazon and Walmart, they need to capture online sales by effectively marketing their omni-channel retailing platforms to their current and potential customers. Previous grocery research has focused on big chains and most from the United Kingdom where online grocery shopping is more established compared to the United States (Elms, de Kervenoael and Hallsowrth, 2015; Melis et al. 2016; de Kervenoael, Elms and Hallsworth 2014; Breugelmans and Camp, 2016). This research will specifically focus on omni-channel grocery adoption among independent grocery retailers in the U. S. The purpose of this two-fold study is to test which incentives or messaging (if any) will motivate consumers to start online grocery shopping with independent grocery retailers by applying the diffusion theory.

The first aspect of the study is an experiment using marketing emails to a store's already-established customer list to disseminate incentives and marketing messages. The emails will include messaging tactics such as online customer reviews and money-back guarantees, and incentives of coupons and free online shopping service offers. The second part of the study is a survey also sent through email. This complete study hopes to answer the research question: Which marketing messaging, incentives, or combination of messaging and incentives delivered through email have the greatest effect on consumers' decision to try online grocery shopping? Through the testing of seven

hypotheses, it is expected that emails with messaging of online customer reviews and free service incentives will have the greatest effect on online grocery shopping trial of all of the messaging and incentive combinations.

Literature Review

The following literature will examine the current state of omni-channel grocery shopping for independent grocery retailers and their competitors, along with the predicted growth of the industry. Then it will cover the diffusion of innovations theory by relating the diffusion theory to online grocery shopping, advantages of online shopping diffusion for grocery consumers, theory limitations, and important reasons to study online grocery shopping diffusion. The next section of the literature review will define the barriers to online grocery shopping diffusion, which include perceived risks and urgency shopping. The following section “Discovering a Solution through Research”, will utilize past studies to guide the research question formation and hypotheses of this study. This lead the researcher to specifically focus on marketing messages that include online customer reviews and money-back guarantees, along with free-shipping and price incentives. The next section will examine email marketing as the specific tool for this research. The final section will cover the importance of channel diffusion research, in this case, the online grocery shopping channel.

Omni-channel Retailing in the Grocery Industry

The customer journey will never be the same. Rather than driving to the local mall to purchase a green dress or a red purse, consumers have taken to the internet. After a few searches, customers may see the product they have been thinking about on a website advertisement, in a marketing email, or on Facebook. A few clicks later on the computer or smartphone and the product has been selected from a company’s website. Soon, it is on its way to the purchaser’s home or office address. Selecting that perfectly

ripe, green avocado or firm, red tomato is a little more challenging, both for the consumer and for the retailers who supply fresh produce and other groceries. Online grocery shopping is part of an omni-channel retailing strategy that grocers of all sizes are adopting due to consumers' wants and needs, both present and future.

Omni-channel retailing is a marketing strategy that employs a plethora of different types of "channels" to sell products. This includes both digital and physical channels. Omni-channel is unique in that customers "seamlessly" transition between the in-store and online shopping experiences through a blurred customer journey. This is a progression of multi-channel retailing, which indicates different customers using each channel (Piotrowicz & Cuthbertson, 2014, p. 6). Omni-channel retail customers do not select one method of shopping, but smoothly pass between each depending on whichever is most convenient at the moment.

Although online shopping for food has not gained popularity as quickly as other online retail areas, there is substantial growth predicted in the category (Menayang, 2017, para. 1). This is due to the availability of more online shopping platforms, and consumers' growing experience and comfort purchasing groceries online.

Independent grocery retailers. As defined by the National Grocers Association (NGA), an independent grocery retailer is:

A privately owned or controlled food retail company operating a variety of formats. Most independent operators are serviced by wholesale distributors, while others may be partially or fully self-distributing. Some independents are publicly traded, but with controlling shares held by the family and others are employee owned. Independents are the true "entrepreneurs" of the grocery industry and dedicated to their customers, associates, and communities. (National Grocers Association, Who We Are section).

Independent grocery retailers compete in a marketplace of Amazon, Walmart, and other large, corporate chains. Although independent grocery retailers possess fewer resources than their larger counterparts, they can still offer the same products with an emphasis on quality customer service, freshness, a community environment, and other personalized experiences that have captured loyal customers in store and set them apart from other competitors that focus solely on price differentiation. David Bishop of Brick Meets Click, a retail advisory and consulting company, explained this concept: “Commerce flows to companies that have stronger connections with consumers. This is based in turn on how they leverage existing and future capabilities based on their respective circumstances” (Progressive Grocer, 2017, para. 2).

Independent grocery retailers need to evolve in order to offer an omni-channel retail strategy. This would allow them to stay competitive with other traditional and non-traditional grocery chains that offer these capabilities. Omni-channel retail customers do not select one method of shopping, but smoothly pass among several channels depending on whichever is most convenient at the moment. They also could use multiple channels at the same time. For example, a consumer may be shopping in a store while looking at the store’s weekly advertisement in an email, when he or she is sent a text message from that store with a digital coupon to use. Mobile devices have enabled consumers to purchase “anything, anywhere, anytime” with relative ease (Piotrowicz & Cuthbertson, p. 6). This connectivity to consumers also has allowed retailers to market to them through a large option of mediums. These include, but are not limited to: social media, digital coupons, location-based services and beacons, digital signage, email, text messaging, smart labels on packaging, online targeted advertising, and more (Piotrowicz &

Cuthbertson, p. 6). These marketing methods can result in a broader online shopping and omni-channel strategy. Independent grocery retailers need to discover which marketing tactics and messaging best promote their omni-channel strategy in order to compete.

Competitors. Independent grocery retailers are faced with several challenges and opportunities as they compete against much larger businesses with access to extensive toolboxes of resources and sophisticated omni-channel options. Retail giant Amazon already owns 22% of food and beverage sales made online, which could grow significantly due to the company's recent Whole Foods Market transaction (Banjo, 2016; Wingfiled & de la Merced, 2017, para. 1; Kharpal, 2018, para. 1). This is a direct threat to independent grocery retailers; however, Amazon's share of the food market is still a small fraction of the groceries sold in the U.S. The door remains open for independent grocery retailers to not only retain current customers but also claim a greater share of online sales. Loyal in-store consumers shop at the same grocery retailer because they trust the store's owners and employees. These consumers are personally guaranteed that they will go home with quality products that match appropriate pricing because they receive service in the store that ensures it (Hays, Keskinocak & Lopez, 2005, p. 5). To compete effectively, independent grocery retailers have the opportunity to translate this service online by integrating digital offerings, including online shopping, to create an omni-channel environment for their loyal and new customers.

Omni-channel growth. Several industries have been successful in executing omni-channel retailing. Although online shopping for food has not gained popularity as quickly as other online retail areas, substantial growth is predicted. This is evident especially through Amazon's \$13.7 billion purchase of Whole Foods Market (Wingfiled

& de la Merced; Kharpal, 2018). In fact, Menayang (2017) reported that as many as one in three consumers would grocery shop online in 2017. New research from Nielsen and FMI predicts that 70% of consumers will grocery shop online within five to seven years (The Nielsen Company, p. 3, 2018). Therefore, independent grocery retailers are advised to integrate online grocery shopping into their retail strategies. They also should consider marketing the program quickly and effectively, so that their already-loyal customers and new, potential consumers think of them first when deciding how to shop – either in-person or online. The 2018 Annual Grocery Shoppers Survey conducted by Nielsen and Harris Poll on behalf of the National Grocers Association revealed that 64% of independent grocery retail shoppers are “very/extremely satisfied” with their local grocer, and these loyal shoppers tend to spend 40% more than average grocery shoppers (National Grocers Association, 2018, para. 2). Therefore, independent grocery retailers need to capture loyalty in physical and digital spaces.

In order to do this, independent grocery retailers need to discover which incentives and messaging (if any) will persuade consumers to try online grocery shopping with their store and continue the practice going forward. The predicted sales growth and comfort with online grocery shopping already are evident by the popularity of meal-subscription services like Blue Apron, Plated, and Hello Fresh. These services allow consumers to select meals online. The fresh, perishable ingredients are delivered to the consumers who then prepare the meals in their home kitchens. The Nielsen online grocery shopping study states that nearly one-fourth of the report’s participants have tried meal-kit or similar services (The Nielsen Company, 2017, p. 5). Meal-kit subscriptions are an example of a retail disruptor that has changed consumers’ eating habits in a

relatively short period of time. According to the companies' websites, Blue Apron and Plated were founded in 2012, and Hello Fresh in 2011. These rapid changes provide additional proof that independent retailers need to adapt to consumers' wants and needs sooner rather than later.

Diffusion of Innovations Theory

The adoption of online grocery shopping can be studied through the diffusion of innovations theory, which examines the spread of new ideas, technology, or information over time. Everett Rogers is known for developing this theory and its four distinct phases: information, persuasion, decision or adoption, and finally confirmation (McQuail, 2010, p. 488). Rogers defines diffusion as "the process by which an innovation is communicated through certain channels over time among the members of a social system (Rogers, Singhal, & Quinlan, 2008, p. 418). Rogers' definition was developed after examining the classic hybrid seed corn study conducted by Bryce Ryan and Neal C. Gross in 1943, which discovered that adoption of a new technology is accelerated through mass and interpersonal communication (Rogers, et al. p. 420). The theory has been applied to a variety of disciplines including mass communications and marketing (Rogers et al., p. 419). For these reasons, the diffusion theory was selected for this study since it incorporates mass communications, marketing, and the adoption of a new technology through a social system (in this study's case, a grocery store's customer base).

The Bass model of diffusion was also examined in formulating the experiment (Mahajan, Muller, & Bass, 1990, p. 2). The Bass model identifies two important groups of the population who accelerate diffusion. First are the "Innovators" who are influenced by mass communications. In this experiment, the Innovators are the populations who

decide to try online grocery shopping due to a marketing email's coupon or free service incentives, or money-back guarantee messaging, or combination. The second group is known as the "Imitators" who are more influenced by word-of-mouth communication. In this research's case, it would be the population that is influenced to online grocery shop due to online customer reviews from other customers that are sent through email communication.

Relating diffusion theory to online grocery shopping. Rogers (1983) contends that communication is an important component of his theory and is viewed as "a two-way process of convergence" (p. 5). Essentially, Rogers describes diffusion as a specific type of communication that involves two important elements: the message carries a *new* idea, which in turn carries *uncertainty* (Rogers, p. 6). The degree of uncertainty is the reason some innovations diffuse at a slower rate than others, which is exemplified by the limited adoption of online grocery shopping. Online grocery shopping carries a high level of uncertainty because traditional grocery shopping is a high-tactile experience. Shoppers like to squeeze their vegetables, smell their fruits, ask for advice from the in-store butchers, and look for "Sell-By-Dates" on packaging. All of these experiences are lost when online shopping, leaving customers with more uncertainties and resistance to adopt the practice.

According to the diffusion theory, when adoption is plotted over time, the distribution of adoption by the cumulative number of customers will form an S-shaped curve. The beginning of the curve represents the innovators (or the first to adopt), followed by the early adopters, early majority, late majority, and finally the laggards (Rogers, Singhal, & Quinlan, 2008, p. 424). Diffusion occurs in the middle of the *S*

shape when adoption increases dramatically. Online grocery shopping currently is popular only among innovators and early adopters, so the S-shaped curve has not been formed yet when examining the distribution¹.

Rogers' four distinct phases of information, persuasion, adoption, and confirmation also can be translated to online grocery shopping for this particular research. The information stage includes initial messages of awareness about an independent grocery retailer's omni-channel offerings. Persuasion includes incentives and targeted marketing messages that entice customers to try online grocery shopping. Decision and adoption occurs when customers decide to become an online grocery shopper. Confirmation happens when customers decide to online shop repeatedly with an independent grocery retailer and show loyalty to that retailer.

Advantages of diffusion for the grocery consumer. The diffusion theory has been applied to the adoption of many internet technology platforms, similar to those that support online grocery shopping. Rogers (1983) states, "One reason why there is so much interest in diffusion of innovations is because getting a new idea adopted, even when it has obvious advantages is often very difficult" (p. 1). Online grocery shopping has many "obvious advantages" for a variety of consumers. It can make grocery shopping more convenient and less time-consuming because customers can shop from any location that has internet access. It is useful for a variety of demographics also. Since buying groceries is a regular activity in most people's lives, Clogan (2015) believes the service of online grocery shopping transcends the "young and affluent" digital natives who are already comfortable buying many other goods online (para. 2). His research

¹ As of 2016, recorded online grocery sales in the United States totaled only 3.3% of all grocery spending (Breugelmans and Campo, 2016). New Nielsen research predicts sales will grow to 20% by 2025 (Danziger, 2018).

points to lifestyle factors serving more as determinants toward online grocery shopping trial rather than demographic factors.

Besides the young and affluent, other consumers with lifestyles conducive to using online shopping include busy parents who have little time to make a trip to the store or prefer not to bring their children along with them. Online shopping allows them to shop from anywhere while juggling their children's activities. Another group includes urban dwellers who do not own cars and therefore find it inconvenient to transfer groceries on public transportation. Urban dwellers who do have vehicles may find drive-thru services especially convenient due to lack of inner-city parking. Some may prefer delivery services. Other groups include elderly adults and physically-disabled individuals who find it taxing to shop in stores or have little means of transportation to stores (Clogan, 2015, The Convenience of Online Grocery Shopping section).

Despite these advantages, online grocery shopping has not been adopted widely and *confirmed* based on Rogers' definitions. This lack of adoption makes studying online grocery shopping through the diffusion theory relevant.

Theory limitations. Limitations of the diffusion theory in regards to online grocery shopping and this research do exist. Unlike other internet technologies, the *interactivity* of a customer online grocery shopping does not affect the value of others who are also online grocery shopping. Rogers, Singhal, and Quinlan (2008) stated that, "With each successive adopter of an interactive innovation, the new idea becomes more valuable not only for each future adopter, but also for each previous adopter." (p. 427). Examples of interactive innovations that affect other users include telephones, email

usage, and social media networks. As more people use these innovations, more people find it valuable because the possibility of communicating with more people grows.

Although online grocery shopping is interactive between the customer and the retailer, customers are not interacting with each other while shopping online; therefore, the adoption rate will not affect other customers' experiences. A customer will receive the same experience if he or she is the only person shopping online or if fifty other people also are shopping online. We may even see the reversal for online grocery shopping. If only one person is shopping online, the grocery store employees can fill that order more quickly than if they need to fill fifty.

Another limitation of the theory in regards to this research is the measurement of diffusion over time. The email experiment took a timestamp measurement of the awareness, persuasion, and decision stages of diffusion. The experiment does not further study the formation of the entire S-curve of diffusion and specifically the final stage of confirmation.

Three reasons to study online grocery shopping diffusion. As the diffusion of online grocery shopping evolves and grows in popularity, researching the marketing and communications of it becomes more relevant. There are three main reasons. First, Amazon and other retailers aggressively are pursuing grocery dollars (Wingfield & de la Merced, 2017). Amazon is now offering its Prime members (those who pay a \$99 per year membership fee) free two-hour delivery of fresh groceries, which includes produce, dairy and meat products (Kharpal, 2018). The service is only offered currently in select cities, but Amazon announced plans to expand nationwide. If independent grocery retailers do not keep up with the technology that others are offering, they could

potentially lose a segment of their businesses. Other outlets, such as Walmart, also have announced continual plans to expand online shopping capabilities (Del Rey, 2018, para. 3).

Second, consumer behavior is shifting to a digital mindset. Although, grocery retail historically shows a much slower adoption rate than other categories, consumers are learning and becoming more comfortable with online shopping; they will soon come to expect it or simply look for a different retailer that does provide the service. When buying fresh and household groceries, only 4% of North Americans say they buy these groceries online regularly (The Nielsen Company, 2017, p.16). However, according to the same study, 42% of North Americans fall into the “trialists” or “considerers” categories, meaning these consumers have bought these groceries online before, but not recently, or they have not tried online grocery shopping yet but are willing to try it soon (The Nielsen Company, p. 16). These “trialists” and “considerers” are an ideal target market for independent grocery retailers to capture. Nielsen is also predicting that online grocery sales are growing quicker than they originally estimated just one year ago. New research shows that 20% of total grocery sales could be completed online by 2025, which would account for \$100 billion (Danziger, 2018, para. 1).

Consumers in Generation Z, which consists of people aged 12 to 21, have only lived in a world where the internet has existed. This generation, along with millennials aged 22 to 36, are using more online grocery platforms than any other generation (Acosta, 2018, para. 1). However, older generations also are embracing the digital mindset. According to the same study, 70% of Generation X (those 37-52) self-reported using digital grocery coupons (Acosta, 2018).

Finally, studies and success stories have proven that online shoppers tend to spend more per purchase, which equals greater profits for the retailer (Lopez, Said & Westphely, 2014, para. 9). Whether consumers buy all of their groceries or just a few products online, providing and marketing the online shopping channel could lead to larger sales. Although product diffusion has been studied extensively, Bilgicer, Jedidi, Lehmann, and Neslin (2015) note the importance of studying the marketing of *channel* adoption specifically (p. 267). They explain that marketing is persuasive in the diffusion of new shopping channels, similar to the diffusion of products. Understanding both is essential in order to gain the increased profits that were discovered by Lopez et. al.

Barriers to Diffusion

Perceived Risks. In order to secure larger sales, independent grocery retailers must overcome several barriers. Perceived risks are the main hurdle. Risks include those seen throughout any form of online shopping, such as identity and credit card information theft, or performance failure of the shopping technology or products purchased (Wu & Ke, 2015, p. 87). Wu & Ke (2015) suggest that trust is an essential element that can be used to overcome consumers' attitudes towards perceived risks. Luckily for independent grocery retailers who are focused on quality customer service, freshness, a community environment, and other personalized experiences, they already have established a strong bond of trust with their customers. Hansen (2008) also concluded that attitudes about the online shopping process and its risks are the most significant indicator of whether a consumer will buy online (p. 135).

Other risks are specific to online grocery shopping. A survey published by Business Insider shows there are a variety of reasons why American consumers feel

uncomfortable buying their groceries online. The top reasons include the lack of tactile experiences, such as personally selecting perishable produce, and physically examining products and their packaging (Meola, 2016). Chu, Arce-Urriza, Cebollada-Calvo, and Chintagunta (2010) point out that some consumers may worry about a health risk since they cannot see specific “Sell-By-Dates” on products like they would while shopping in stores (p. 255). This is accentuated in the Bilgicer et al. (2015) study cited above, in which we learn that adopting a new channel carries the risk of purchasing through the channel *and* the products that come with it (p. 267). Unlike purchasing clothing or other durable products, consumers like to smell and touch their produce, and examine boxes of food before purchasing. These experiences cannot be replicated while shopping online.

Urgency shopping. Among other barriers that prevent consumers from grocery shopping online is the “urgency factor” that consumers feel towards some products (The Nielsen Company, 2015, p. 12). Consumers experience this urgency factor when they run out of an item that they consider an essential and need immediately. Most online shopping providers require a wait time to prepare online orders for pickup or delivery. A consumer may deem visiting the nearest brick-and-mortar store the easiest option in these cases. This demonstrates that a traditional brick-and-mortar store along with online shopping options is the best scenario for today’s consumers. This accounts for the recent opening of physical stores by Amazon and Alibaba, and Amazon’s purchase of Whole Foods Market. For perspective, Alibaba, which is based in China, is the largest online shopping company in the world, boasting yearly sales that total more than those of Amazon and eBay together (Lajoie & Shearman, 2014, para. 2). Independent grocery

retailers have the advantage of already owning brick-and-mortar stores. This provides additional incentive for them to enhance their digital offerings.

Discovering a Solution through Research

How do retailers overcome these barriers? Past research has examined a variety of marketing messages and incentives that influence consumers and could overcome the risks associated with online grocery shopping. This study will focus on four: online customer reviews messaging, money-back guarantee messaging, free-service incentives, and price incentives in the form of coupons.

Online customer review messaging. “The diffusion of innovations field emphasizes interpersonal communication networks more than any other type of communication research (Rogers, Singhal & Quinlan, 2008, p.419). Encouraging this networking through the internet can be accomplished by way of customer advocacy in the form of online customer reviews (OCRs). Customer advocacy is a meaningful trend, in which consumers heavily trust other consumers by reading reviews, rating companies, products, and experiences, and then sharing this information online (Castrejon, 2017, How are emerging brands maximizing sales on the digital shelf? section).

Consumers are comfortable sharing product and service ratings, reviews, and personal insights online (Piotrowicz & Cuthbertson, 2014, p. 9). These OCRs can influence other customers. Retailers can use these OCRs as a marketing strategy by sharing positive OCRs. In this study, the research will share positive OCRs through marketing emails that promote online grocery shopping from the retailer.

Piotrowicz and Cuthbertson (2014) stress the importance of engaging customers socially and utilizing these relationships:

The importance of a one-to-one relationship between retailer and customer is great, because the customer serves as a medium between herself or himself and the wider social network, which is maintained even in the in-store environment via mobile devices... Along with the challenges, there are opportunities in this area, such as employing customers as brand advocates (p. 9).

Consumers trust OCRs from sites like Facebook, Yelp, and Google, along with reviews about specific products posted directly on online shopping sites like Amazon. These OCRs can be posted while in the store from mobile devices or while customers are shopping online from their home computers. Many of these platforms also allow a retailer to respond to customers, deepening their interpersonal relationship with customers. Due to OCRs' perceived credibility to consumers, Elwalda, Lu and Ali (2015) stress that OCRs can significantly influence customer adoption (p. 306). This is because OCRs promote trust, which is a key driver of customers' intentions to shop online (Elwalda et al., 2015, p. 315). Elwada et al.'s 2015 study goes on to conclude "that customers seem to trust e-vendors who provide OCRs that have the element of enjoyment, suggesting enjoyment as a key factor affecting customer trust" (p. 316). For this reason, the impact of OCRs is a main effect of each hypothesis in the current study.

Money-back guarantee messaging. The Nielsen Company (2017) suggests highlighting a money-back guarantee in messaging to consumers (p. 17). Compared to other incentives, "a money-back guarantee is the most effective strategy to encourage online shopping" across categories (The Nielsen Company, 2017, p. 19). Money-back guarantees can act as a tactic to help customers overcome the "uncertainties" of online grocery shopping. As mentioned earlier, "uncertainties" commonly deter diffusion (Rogers, 1983, p. 6). The research on marketing messaging of OCRs and money-back guarantees direct the first hypotheses:

H1: Emails with messaging of online customer reviews and a money-back guarantee will have a greater effect on online grocery shopping trial than emails with messaging of a money-back guarantee only and no OCRs.

H2: Emails with messaging of a money-back guarantee will have a greater effect on online grocery shopping trial than emails without messaging of a money-back guarantee, but not as large of an effect as emails with messaging of an online customer review and a money-back guarantee.

Price incentives: coupons. Price incentives come in a variety of forms including product sales, pricing strategy promotions, and coupons, or money-back guarantees and free shipping promotions (Walker Sands Communication, 2016; The Nielsen Company 2017). Huang, Zhang, Liu, and Liang (2014) studied the diffusion of new product purchases through omni-channel retailing by focusing on word-of-mouth (WOM) marketing and contend that even though WOM marketing affects purchasing decisions, consumers also are motivated by price incentives (p. 179). Although the current research is focusing on omni-channel price incentives like the 2014 Huang et. al. study, this research is unique in its hope to fill in the research gaps by studying channel diffusion instead of product purchase diffusion. This research is also different from the Huang et. al. study in that it focusing on email marketing instead of WOM.

A price incentive that continues to catch the attention of consumers is coupons. According to Schultz and Block (2015), coupons remain one of the most influential shopper-marketing tactics (p. 103). Melis et al. (2016) also note the importance of shoppers seeking out price values and incentives, especially in regards to embracing online grocery shopping for the first time (p. 281). Consumers search for the best value.

If they already feel they are receiving quality values and incentives from their frequently visited brick-and-mortar stores, they are more likely to translate those purchasing habits online with that store, assuming the store offers the same experiences (Melis et al., 2016, p. 281). In addition, according to the Melis et al. (2016) study, grocery retailers should capture online loyalty quickly because grocery shopping is a habitual practice. Once consumers become comfortable with their online shopping provider, they also become resistant to change and less likely to try a different provider without significant incentives (Melis et al., 2016, p. 281). Melis et al. (2016) collected these findings through a 2.5-year empirical analysis of data from omni-channel and single-channel grocery shoppers.

Although coupons may seem like an antiquated strategy, tech-savvy millennials are bringing popularity back to coupons in digital and traditional print forms (Freud, 2016). Millennials are motivated by price and are comfortable “clipping” coupons in any format. Statistics show nine in ten millennials use coupons in some form (Freud, 2016). An Acosta study reported that 60% of millennials used digital coupons or discount apps for grocery shopping (Acosta, 2018).

However, millennials are not the only coupon users. As noted earlier, 70% of Generation X shoppers self-reported using digital coupons within a month’s time (Acosta, 2018). This provides further evidence that offering consumers price incentives, like coupons, could be a successful way to entice them to start online grocery shopping with a particular retailer. These findings point to the following hypotheses:

H3: Emails with messaging of online customer reviews and a coupon incentive will have a greater effect on online grocery shopping trial than emails that contain only a coupon and no messaging of online customer reviews.

H4: Emails with a coupon incentive will have a greater effect on consumers online grocery shopping trial than emails without a coupon incentive, but not as large as emails that have messaging of online customer reviews and a coupon incentive.

Free-service and shipping incentives. A study by Walker Sands Communications, a public relations and digital marketing agency, showed that across all categories, free shipping is a popular incentive to encourage customers to try online shopping (Walker Sands Communication, 2016, p. 5). The Nielsen Company (2017) underscored this finding noting, almost 50% of “considerers” and “trialists” would be willing to shop online when free shipping is included (p. 17). Free shipping (also referred to as delivery) can be given in a variety of forms including offering it to customers who spend a certain threshold or as a limited time offer, or providing it on certain days of the week (The Nielsen Company, 2017 p. 18).

In contrast, a study by Huang & Oppewal (2006) found that a delivery charge was the least significant factor affecting consumers’ decision to online grocery shop among three other factors including time availability, travel time to the store, and trip purpose (p. 18). These researchers noted that delivery charge still had a small effect on online grocery shopping decision; however, travel time to the physical store was the most significant indicator of whether consumers choose to shop online or in-store (Huang & Oppewal, 2006, p. 18). This is further evidence suggesting that marketing incentives need to be studied to discover if they are effective enough to invest in with time and money.

In addition, can general statements, like those made by The Nielsen Company or Walker Sands Communication, grouping shopping categories together also be applied to

online grocery shopping, since it displays a slower rate of diffusion? This study hopes to discover the answer to that question. Melis, Campo, Lamey, and Breugelmans (2016) noted that the grocery industry is different from others because consumer involvement is lower. In other words, grocery shopping is a regular practice involving mostly lower-cost products, unlike the purchase of expensive electronics or other goods that involve extensive research before purchase (Melis, et al. p. 269). Melis, et al. (2016) therefore concludes, “Most of the previous findings obtained in other shopping contexts cannot be simply generalized to the grocery sector” (p. 269).

Although the independent grocery retailer used in this study does not offer shipping or delivery service, its online shopping program carries a service fee. Instead of analyzing free shipping, this study will focus on waiving the service fee to determine if free service is a factor in motivating consumers. This research will test whether free service offers are as effective in the grocery industry as in other industries. This brings us to our final hypotheses:

H5: Emails with messaging of online customer reviews and an incentive of using the online grocery shopping service for free will have a greater effect on online grocery shopping trial than emails with only the free service incentive and no online customer reviews.

H6: Emails with the incentive of using the online grocery shopping service for free will have a greater effect on online grocery shopping trial than emails without the free service incentive, but not as large as emails with messaging of online customer reviews and the free service incentive.

H7: Emails with messaging of online customer reviews and free service incentives will have the greatest effect on online grocery shopping trial of all the messaging and incentive combinations.

Email as a Marketing Tool

After analyzing data from Forrester Research and Experian, Freud (2016) suggests email as a successful channel to distribute coupons to consumers. According to a recent email marketing study conducted by Emfluence (2017), the average open rates of marketing emails by consumers for the food and beverage industry is 22% and general retail is 21% (Jackson, 2017, Average Email Marketing Metrics by Industry section). Open rates refer to the number of consumers who clicked on an email in their inbox to see the content. This is also referred to as views rates. When an email is deleted straight from the inbox listing where a consumer only sees the sender information and subject line, it is not included in the open rate. As we can see from this benchmark study, email open rates also are easy to measure due to marketing email software with reporting capabilities provided by companies like Emfluence. In addition, due to the CAN-SPAM Act, consumers receive marketing emails from retailers only when they agree to opt-in to receiving them. By law, consumers must be given the option to opt-out at any time easily from any email (Federal Trade Commission, 2009, Main Requirement #6). This ensures that consumers willingly want to receive marketing emails from specific retailers.

Email also allows marketers and researchers more specific analytics about which audience members were reached, opened the email, and clicked on links. Once the customers have subscribed to a store's email list, stores can directly communicate with them. In contrast, due to changing social media networks' algorithms, a retailer's

marketing messages are not guaranteed to appear in their customers' social media feeds, regardless of whether those customers "Like" or "Follow" a retailer's profile. Usher-Layser (2016) noted that Facebook's algorithm technology known as EdgeRank, "uses more than 150,000 different factors" to determine which content consumers might want to see in their news feeds (Usher-Layser, 2016, p. 18). For the majority of Facebook users, they are seeing fewer than a tenth of the cumulative posts they could see in a day if they were to look at everything posted from the people and brands in their networks (Usher-Layser, 2016, p. 18). With email marketing software, retailers can send messages to their entire list of subscribers, then see specifically which customers opened the email and clicked on links to become an online shopper.

Email marketing and the diffusion theory. Communicating through email is a more individualized method, taking place between the retailer and each consumer, as opposed to a method like social media where many customers can interact with a retailer and each other at the same time within the network's community. Although emails may be deployed as a mass send, marketing software allows professionals to tailor each email with customers' names and other variables with relative ease. This individualization can make emails feel more interpersonal and less like mass communication. Although the "community" feel of social media may be lost while utilizing email marketing, certain aspects can be integrated into the email messaging to help encourage targeted customers to try online grocery shopping. Rogers, Singhal, and Quinlan (2008) wrote that the diffusion process often can consist of interpersonal communication *and* mass media channels (p. 418). Internet technologies like email and social media involve both in unique ways.

Interpersonal communication can sometimes be difficult to establish when sending marketing messages, but internet channels allow retailers to build a relationship with consumers in their most personal spaces – their cell phones and computers. Retailers can also utilize channels like email and social media to foster a community that may not have formed without the internet. For example, members of a store's community of shoppers may have different shopping hours in which they never interact with each other at the physical store. Through internet communities, these shoppers can interact with each other despite the fact that they shop at different times or read reviews online from other consumers they may never interact with in person.

Gap in email research. The previously mentioned Huang et al. (2014) research studied the diffusion of new product purchases through omni-channel retailing by focusing on WOM through both offline communities and online communities such as social media networks like Facebook (p. 180). Although WOM is applicable to the present research through OCRs, it is better applied to social media networks instead of email communication. Social media networks have been extensively studied in regards to product diffusion (Huang et al 2014; Katona, Zubcsek & Sarvary 2011; Piotrowicz & Cuthbertson 2014), so this study hopes to contribute by focusing instead on email marketing.

Channel Diffusion

Huang et al. (2014) focused on specific product diffusion instead of channel diffusion. Product diffusion through online shopping has been studied in greater detail than channel diffusion. The present study looks specifically at *channel* diffusion through online grocery shopping. Bilgicer et al. (2015) noted only a small number of studies

center around new channel diffusion rather than product diffusion (p. 256). As a result, Bilgicer et al. (2015) studied multichannel sales adoption. However, the Bilgicer et al. (2015) research did not include the grocery industry but examined the diffusion of channels selling consumer apparel products instead (p. 254). Durable product categories like apparel and other similar industries are easier to study because of their longer history of online shopping adoption. Since online grocery shopping is still in its infancy, this research will only be able to examine the beginning of diffusion. Bilgicer et al. (2015) noted a limitation of their study was that one can never measure all outside explanations that may influence adoption. Although diffusion theory studies like Bilgicer's analyze data over a long period, these studies must also factor in more outside explanations that cause adoption. This study will specifically examine the effects of initial marketing communications of the new online grocery shopping channel to discover which incentive or messaging is most influential. This will allow fewer external factors to influence the data.

Since the above literature shows a lack of new channel adoption studies that specifically look at the grocery industry through the lens of email marketing, the following research will do just that. The few studies that do examine online grocery shopping diffusion tend to utilize qualitative ethnographies, and most come from the U.K., where online grocery shopping is more established compared to the U.S., where it is just now gaining popularity (Elms, de Kervenoael and Hallsworth, 2015; Melis et al. 2016; de Kervenoael, Elms and Hallsworth 2014; Breugelmans and Camp, 2016). This study will use quantitative methods and specifically target U.S. consumers. As determined by The Nielsen Company (2017), there is no specific model of online

retailing and marketing that can serve as a template for everyone; the challenge is to combine the “best of the offline and online worlds” in a way that helps retailers expand their relationships with their customers (p. 31).

In regards to applying the diffusion theory to studies today and in the future, Rogers, Singhal, and Quinlan (2008) note:

Also, diffusion of innovations practice needs to increasingly acknowledge and value the role of indigenous wisdom and solutions. Indeed, innovations that are generated locally are not just more likely to be culturally appropriate, but also more likely to be owned by potential adopters (p. 430).

The above idea can be the key that gives independent grocery retailers an advantage over larger, corporate grocery chains. These local grocers can generate messaging, incentives, and an online environment that mimics the local, community-feel present in their stores. Community acceptance can transcend online if independent grocery retailers discover the right combination of communication tactics that make online grocery shopping acceptable by their customer bases. In order for media and marketing professionals to adequately apply the diffusion theory to help retailers, McQuail (2010) notes other aspects also must be available including: individuation, trust of technology (in this research’s case, the safety and reliability of the online shopping platform), legitimacy, and objectivity (p. 488). When independent grocery retailers provide their customers with a personalized experience just like what they would receive in stores (individuation), along with reliable technology (trust), and valuable incentives and marketing messages (legitimacy) that are fair and easy to understand (objectivity), the retailers should be able to persuade customers to shop loyally with them online and in stores.

By determining which incentives and messaging most influence customers to try online grocery shopping, retailers can utilize these factors to increase the rate of diffusion of online grocery shopping with their specific platforms, as opposed to those of competitors. It is pivotal for retailers to capture these customers quickly because previous studies show that grocery shopping is habitual; once consumers become comfortable with their shopping provider, they become resistant to changing to a different provider without significant incentives (Melis et al., 2016, p. 281). In addition, research proves that online shopping customers purchase larger basket sizes (Lopez, Said & Westphely, 2014, Zwiebach, 2016). This equals larger sales and additional share of wallet from current customers for independent grocery retailers.

Product adoption has been studied extensively; however, literature shows a lack of new channel adoption (like online shopping platforms), especially in the grocery industry. Literature that does exist on the topic consists of mostly survey research and self-reporting from customers, or qualitative ethnographies. There are few quantitative experiments that confirm or denounce the value of marketing incentives and messaging to consumers to encourage online grocery shopping. Most of these studies focus on marketing online grocery shopping through social media networks, but rarely test the distribution of marketing messages and incentives through email distribution, even though email marketing shows a high return on investment for professionals (Jackson, 2017; Freud, 2016). Therefore, this research will examine three unique areas of research that previously have been neglected: *channel* adoption of online shopping platforms specifically for American *independent grocery retailers* by marketing messages and incentives through *email*. By utilizing the diffusion theory to discover which marketing

messages and incentives have the greatest effect on consumers' decisions to try online grocery shopping, independent grocery retailers can gain business to digital and brick-and-mortar shopping channels.

Methods

This study used quantitative research methods in the form of email experiments and a survey focusing specifically on the grocery industry to answer the following questions and hypotheses:

RQ1: Which marketing messaging, incentives, or combination of messaging and incentives delivered through email have the greatest effect on consumers' decision to try online grocery shopping?

H1: Emails with messaging of online customer reviews and a money-back guarantee will have a greater effect on online grocery shopping trial than emails with messaging of a money-back guarantee only and no OCRs.

H2: Emails with messaging of a money-back guarantee will have a greater effect on online grocery shopping trial than emails without messaging of a money-back guarantee, but not as large of an effect as emails with messaging of an online customer review and a money-back guarantee.

H3: Emails with messaging of online customer reviews and a coupon incentive will have a greater effect on online grocery shopping trial than emails that contain only a coupon and no messaging of online customer reviews.

H4: Emails with a coupon incentive will have a greater effect on consumers online grocery shopping trial than emails without a coupon incentive, but not as large as emails that have messaging of online customer reviews and a coupon incentive.

H5: Emails with messaging of online customer reviews and an incentive of using the online grocery shopping service for free will have a greater effect on online grocery

shopping trial than emails with only the free service incentive and no online customer reviews.

H6: Emails with the incentive of using the online grocery shopping service for free will have a greater effect on online grocery shopping trial than emails without the free service incentive, but not as large as emails with messaging of online customer reviews and the free service incentive.

H7: Emails with messaging of online customer reviews and free service incentives will have the greatest effect on online grocery shopping trial of all the messaging and incentive combinations.

Experiment

For this study, the researcher utilized an already-established customer email list from an independent grocery retailer who is a member of the Associated Wholesale Grocers (AWG) cooperative. AWG is a grocery wholesaler that only distributes to independent retailers. More than 3,200 retail stores are members of AWG in the Midwest and southern regions of the United States. This cooperative was chosen due to the ease of access to its retail members and their customers as a result of the researcher's employment status as a marketing specialist for AWG. The store was selected based on these criteria:

1. The store regularly communicates with customers through email marketing.

Regularly communicates is defined in this research as an email sent to customers at least once per week. This ensures the store already has established a relationship with the customers.

2. The store recently launched an online grocery-shopping program. *Recently launched* is defined in this research as providing an online-shopping platform for customers to use for no more than six total months.
3. The store manager approves the use of their customer list for academic testing and agrees to the distribution of the incentives and messaging listed in the research question and hypotheses.

The specific store selected for this experiment was Marsh's Sun Fresh located at 4001 Mill Street in the Westport District of Kansas City, Missouri. This store met the criteria above. The store never supported an online shopping program before the launch of this experiment. It also has a diverse population of shoppers. According to 2016 census data, Kansas City, Missouri has a population of 481,420 (United States Census Bureau, 2016, Quick Facts section). Marsh's Sun Fresh is part of the city's urban core. It is located in an older area of Kansas City with an aging population, but is also considered an entertainment district. Therefore, it has a thriving young, affluent population. Kansas City is 60% White, 29% Black, and 10% Hispanic (United States Census Bureau, 2016, Quick Facts section).

The store's customers, who previously had signed up for marketing emails were the test subjects. By signing up for the store's email marketing list, the customers have already agreed to receive marketing messages. Prior to starting the experiment, a permission email was sent to the list explaining the experiment and giving customers an opportunity to opt-out of the experiment emails, but still receive Sun Fresh's regular email marketing messages. This permission email also addressed informed consent with a link to more information about the experiment. To comply with the CAN-SPAM Act,

customers were given the option to opt-out of the marketing emails at any time after the experiment started as well. These requests were activated *promptly*, which is defined by the Federal Trade Commission (2009) as “within 10 business days” of the request (Federal Trade Commission, 2009). If customers opted-out of the marketing emails, they were removed from the research email list and no further emails including the survey were sent to them. In addition, no misleading or deceptive information was used in any part of the email messaging, design, or retailer information.

The CAN-SPAM Act also requires retailers and, in this case, researchers to monitor other businesses that are sending email messages on their behalf (Federal Trade Commission, 2009). To address this clause, all emails were composed and distributed by the researcher using the Emfluence platform. Emfluence is a digital marketing software platform that hosts email, social media, surveys, landing pages, and form-building capabilities for businesses and marketers. For this research, the email and survey features of the Emfluence platform were deployed. The retailer had access to view the emails sent on their behalf at any time and approved all emails before the initial send.

There are six reasons the Emfluence platform was selected. First, this platform initially was designed and currently is supported by a digital marketing agency that consists of a team well versed with the CAN-SPAM Act. Second, the Emfluence platform software collects data that is important in the measurement of this research, including open rates, click-through rates, opt-outs, and survey answers. By using a platform that combines the experiment and survey data into one location, the researcher can more easily compare results. Third, rights to use the Emfluence platform already were purchased and used by AWG employees (including this researcher) and several of

its retailers. This lowered costs for the researcher and still allowed access to premium software. Fourth, the Emfluence platform boasts pretesting features that allowed the researcher to test spam filters and email design layouts for popular email providers. This allowed the researcher to examine proper email copy and design that passed filters to ensure external explanations would not influence the email experiment. Fifth, the Emfluence platform includes an A/B testing feature, which randomly divides the customer email lists into testing and control groups. By utilizing this feature, the researcher eliminated sampling bias. Finally, the Emfluence platform has been recognized for its success in the digital marketing industry with awards from Kansas City Direct Marketers Association and Social Media Club of Kansas City, proving it is reliable and successful software (Emfluence Marketing Platform, 2017).

To divide the store's customer email list evenly into testing and control groups, the researcher used simple random sampling of the entire population (in this case, the email list). This basic probability sampling procedure ensured that each person in the population received an equal chance of test selection and established external validity. It also reduced any opportunity for selection biases, since a computer program (in this case, the Emfluence platform) performed the sampling (Wimmer & Dominick, 2014, p. 97-99).

In order for the store to be selected, a stipulation of the email list was that it must contain at least 2,000 subscribers. The Marsh's Sun Fresh email list included 2,883 subscribers at the time of the experiment. After the initial permission email was sent, 2,872 subscribers agreed to participate in the experiment. The list then was divided evenly into seven groups as follows:

Group A: Testing group received email with messaging of OCRs and money-back guarantee.

Group B: Testing group received email with messaging of a money-back guarantee.

Group C: Testing group received email with messaging of OCRs and a coupon incentive.

Group D: Testing group received email with coupon incentive.

Group E: Testing group received email with messaging of OCRs and free service incentive.

Group F: Testing group received email with free service incentive.

Group G: Control group received no extra messaging or incentive – only announcement of online shopping service availability.

With email marketing software, researchers can see specifically which customers opened the email and clicked on links to try the online shopping platform. For this reason, all the incentives and marketing messages in this research were distributed to the testing audience through email. To measure the impact of each independent variable, the researcher measured the number of customers who clicked on the link in the email that allowed the customer to try online grocery shopping. This data was collected 21 days after the initial email to allow customers time to utilize their incentives.

The OCRs included in emails for Groups A, C, and E were collected from real customers that had used the same online shopping service with a different store. All of the OCRs were the same in each email to provide consistency.

The coupon included in the marketing emails for Groups C and D was valued for \$10 off of the store's private-label brands, which include Best Choice and Clearly Organic. Private-label products, also known as store-brands, are growing in popularity

among today's consumers, especially among those who shop online (The Nielson Company, 2017, Store Brands Drive More Trips in Deep Discount and Online Grocer section). Amazon also is seeing the attractiveness of private-label brands by growing its own-brand portfolio and making it easy for customers to purchase these brands online by ordering through Alexa, Amazon's digital assistant (Kulp, 2017, Amazon's many tentacles section). For this reason and the ease of access to private-label deals compared to national brands, the coupon was created to feature private-label products.

The free service incentive provided to customers in email Groups E and F was valued at \$4.99, which is the service fee the store will normally charge to all online grocery shoppers after the initial launch is complete. Customers were notified in the email that they could use the free service incentive for their first three orders. The other components of the marketing emails including the subject line, graphics, and educational copy were all identical to ensure consistency among the tests.

Survey

One week after the experiment emails were sent, the entire population received an additional email with a follow-up survey. The survey email linked to a third-party webpage hosted by the Emfluence platform where participants could answer the questions. An online survey format was used because of its low cost, convenience, time flexibility for participants (they can complete the survey any time of the day), and ability to distribute despite geographic locations (Wimmer & Dominick, 2014, p. 217). Also, the testing population is familiar with the online format, since it is communicating with the retailer through email. The purpose of the survey was to further analyze the customers' attitudes about online grocery shopping adoption. It gathered evidence into

why customers selected the action of trying online grocery shopping or not. It also identified any external factors that may have affected the customers' behaviors and decision-making. While the experiment determines which incentives and messaging (if any) affect consumers, the survey's goal was to determine if the participants' thoughts confirmed the findings of the experiment.

The survey data was cross-sectional. Customers were given two weeks to respond to the survey before the data was collected. One week after the survey was emailed, a follow-up reminder email was sent to participants encouraging them to take the survey if they had not done so already. This email included the same link to the online survey.

Customers only were allowed to answer the survey once. They were not be required to answer all questions to complete the survey, but they were required to answer one initial question in order to submit their survey results. This initial question read, "Have you tried online grocery shopping on our (the retailer sending the email) shopping platform?" Consumers answered "yes" or "no" to this question before proceeding. If the consumers answered this question, they were prompted to continue the survey and their following questions depended on their initial answers. A complete listing of the survey questions can be found in Appendix A.

To analyze the answers to the survey questions, the researcher compared the results to the email experiment to determine whether they were consistent with the self-reported survey data. The means of the incentives and messaging tactics (coupons, free shipping, money-back guarantee, recommendations from others, other, none) were computed to determine which tactic was most popular among the consumers and if these

also align with the email experiment. The results of the initial question (whether or not the participant tried online grocery shopping) was analyzed with the other questions of *intent* to try online grocery shopping based on a listing of the other incentives.

Results

The experiment and survey data were collected from the Emfluence platform and revealed that customers respond differently to email messaging and incentives than what they self-report.

Email Results

Addressing the experiment first, surprisingly, the control group (Group G), which received no extra messaging or incentive and simply announced the online shopping availability, received the largest unique clicks and total clicks rates at 2.4% and 2.7% respectively. Unique clicks account for the number of people who clicked on the link to the online grocery shopping platform. Total clicks refer to the number of times this link was clicked, which can include a single person clicking on the link multiple times.

The clicks rates did not correlate with the views rates as you can see in Figure 1. Email Group D, which contained only the coupon incentive, received the largest unique and total views rates at 17.3% and 29% respectively. Like click rates, unique views refer to the number of people who opened the email. Total views include the number of times the email was opened, which could be by the same person multiple times. Since all of the email subject lines were the same, the unique views rate for all the emails should be similar. The total views rate shows us that the exclusive content in the email spurred continued interest after the initial open. These findings suggest that participants who received the coupon were interested in the content and reviewed it more than once. However, this did not spur a higher clicks rate like that of previously mentioned Group G. This leaves the researcher to conclude that although the coupon may have gathered

interest, it was not enough to affect action. It could also mean the coupon usage instructions may have been hard to understand, which lead participants to view it multiple times, but not act. This second explanation may account for the reason why Group G had a higher clicks rate; the content was simple and straightforward with no extra components to comprehend.

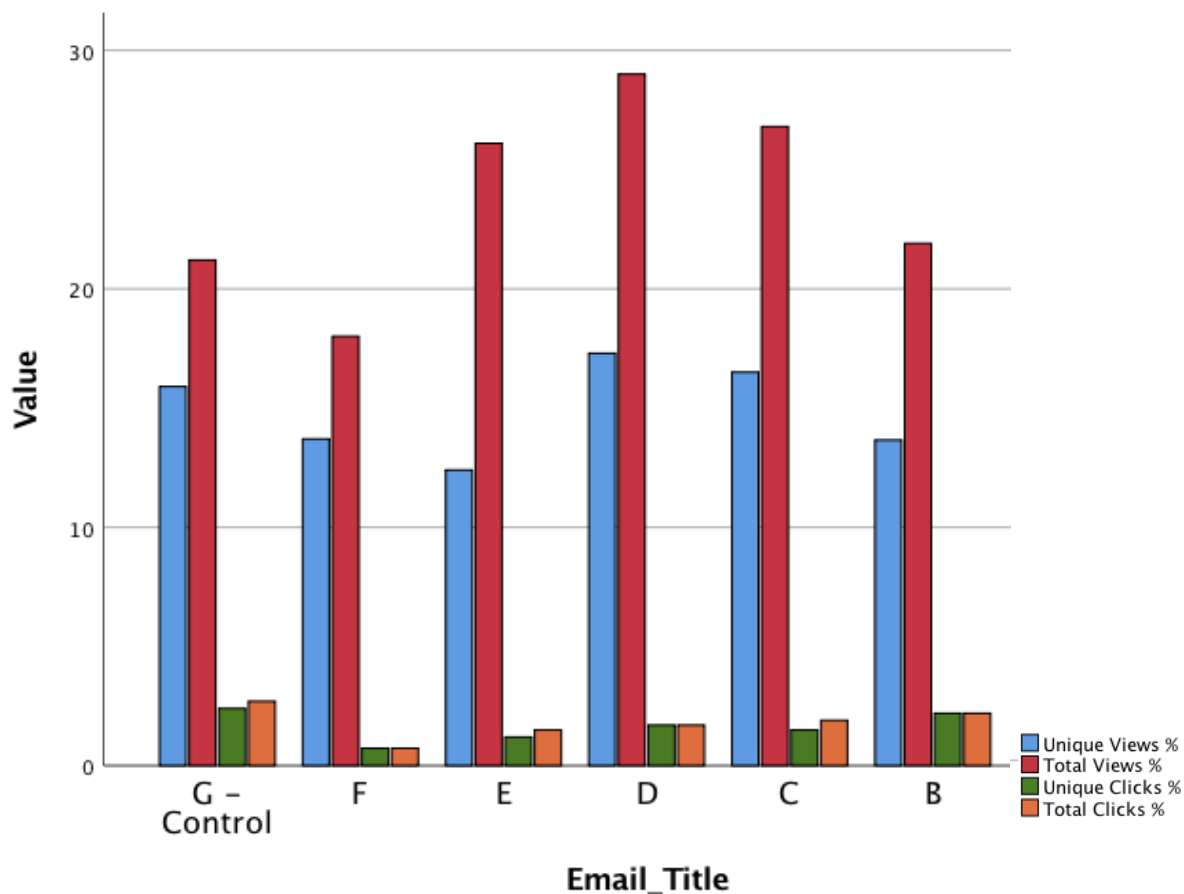


Figure 1. Email Experiment Result Comparison.

Group E, which contained OCRs and the free service incentive, was hypothesized to have the largest effect on online grocery shopping adoption of all of the messaging and incentive combinations. Although it did have the third-largest views rate, it did not translate into the action of clicking to the online grocery shopping platform. This email

received a total views rate of 26.10% and 1.50% total clicks rate. Therefore, the researcher cannot conclude that H7 is true.

All of the open rates and click rates are shown in Table 1. By examining the total clicks rates of the other emails, we can conclude that H1 and H2 are false. H1 tested Group A emails, which contained OCRs and a money-back guarantee against Group B emails, which contained only the money-back guarantee. Group A resulted in a lower total clicks rate than Group B. H2 tested Group B emails against the control Group G. As noted above, Group B received a larger total clicks rate than Group A, but smaller than Group G.

H3 proved to be true: emails with messaging of OCRs and a coupon incentive had a greater effect on online grocery shopping trial than emails with only a coupon and no messaging of OCRs. H3 tested email Group C, which contained both OCRs and a coupon, against Group D, which received only the coupon. As noted above, Group D received the highest views rate, but those views did not translate into action. Group D's total clicks rate was lower than Group C and Group G (the control group without a coupon). Therefore H4 is also false. During the test period, none of the coupons were redeemed.

H5 proved to be true: emails with messaging of OCRs and an incentive of using the online grocery shopping service for free had a greater effect on online grocery shopping trial than emails with only the free service incentive and no OCRs. H5 tested email Group E, which contained the OCRs and free service incentive, against Group F, which only contained the free service incentive. Group F received the second lowest total clicks rate, which was far below control Group G, proving H6 false, which predicted

that emails with the incentive of using the online grocery shopping service for free would have a greater effect on online grocery shopping trial than emails without the free service incentive, but not as large as emails with messaging of OCRs and the free service incentive.

OCRs represented the interpersonal aspect of the diffusion theory and tried to mimic interactivity; therefore, these personal recommendations from other shoppers were hypothesized to have a higher weight of influence throughout the experiment. The clicks rates provide evidence that the OCRs are helpful in enhancing other incentives such as the coupon and the free service offer, but did not enhance the messaging of the money-back guarantee. OCRs also did not outperform the control group email, which contained simple, educational messaging about the online grocery shopping service with no extra marketing messaging or incentives. Following the control group, the email that received the most clicks contained only the money-back guarantee. The two email groups that contained the coupons, Groups C and D, received the next highest total clicks, followed by the emails containing the free service offers, Groups E and F. Receiving the least amount of total clicks was the email containing both OCRs and the money-back guarantee. Table 2 shows that the data differences are statistically significant.

The Bass model identifies two important groups of the population that accelerate diffusion, “Innovators” and “Imitators”. The experiment results show that both groups were responsive to the marketing emails. Further research should study these roles over time, to see which group is more influential in accelerating diffusion.

In conclusion, only hypotheses 3 and 5 are supported by the email results.

H1: Emails with messaging of online customer reviews and a money-back guarantee will have a greater effect on online grocery shopping trial than emails with messaging of a money-back guarantee only and no OCRs. **NOT SUPPORTED**

H2: Emails with messaging of a money-back guarantee will have a greater effect on online grocery shopping trial than emails without messaging of a money-back guarantee, but not as large of an effect as emails with messaging of an online customer review and a money-back guarantee. **NOT SUPPORTED**

H3: Emails with messaging of online customer reviews and a coupon incentive will have a greater effect on online grocery shopping trial than emails that contain only a coupon and no messaging of online customer reviews. **SUPPORTED**

H4: Emails with a coupon incentive will have a greater effect on consumers online grocery shopping trial than emails without a coupon incentive, but not as large as emails that have messaging of online customer reviews and a coupon incentive. **NOT SUPPORTED**

H5: Emails with messaging of online customer reviews and an incentive of using the online grocery shopping service for free will have a greater effect on online grocery shopping trial than emails with only the free service incentive and no online customer reviews. **SUPPORTED**

H6: Emails with the incentive of using the online grocery shopping service for free will have a greater effect on online grocery shopping trial than emails without the free service incentive, but not as large as emails with messaging of online customer reviews and the free service incentive. **NOT SUPPORTED**

H7: Emails with messaging of online customer reviews and free service incentives will have the greatest effect on online grocery shopping trial of all the messaging and incentive combinations. **NOT SUPPORTED**

Survey Results

The initial survey email received larger open rates and click rates, which was expected. The first survey email earned a 21.8% unique views rate and 28.9% total views rate. This email received a 4.3% unique clicks rate and a 4.4% total clicks rate. The follow-up survey email received a 12.9% unique views rate and 16.1% total views rate. It received a 1.6% unique clicks and 1.8% total clicks rate. In total 154 people answered questions in the survey.

The survey revealed that 92.2% of respondents had not tried online grocery shopping on the Sun Fresh platform at the time of the survey, while 7.8% answered that they had tried the platform. Of those who did try the platform, respondents noted that “free-home delivery” would be the offer that would influence them the most to online grocery shop again at 55.6%. Coupons were the second most-popular option at 44.4%. These results were similar to those of respondents who did not try online grocery shopping. Among this group, 72.3% responded that free-home delivery and 58.4% responded that coupons would influence them to try online grocery shopping in the future. These survey results mimic the literature that discovered free delivery was one of the most important offerings.

The experiment data did not collect demographic data; however, the survey respondents (which were also experiment participants) self-reported this information. They were 41.4% male and 58.6% female. The largest age group was 60-69 year-olds at

30.6%. This was followed by 50-59 year-olds at 18.8% and 40-49 year-olds at 17.4%.

The digital natives ages 20-29 year-olds were the least represented at only 6.3%.

Reporting on education level, the majority of respondents noted they had received at least a bachelor's degree at 34.5%. Income level was diverse. The majority earned between \$12,001-\$24,000 at 18.2%. Second on the income scale was \$24,001-\$36,000 at 16.7%, followed by \$60,001-\$72,000 at 14.4%. For full survey results, see Appendix B.

Table 1									
<i>Email Experiment Results</i>									
<u>Email</u>	<u>Sent</u>	<u>Unique Views</u>	<u>Unique Views %</u>	<u>Total Views</u>	<u>Total Views %</u>	<u>Unique Clicks</u>	<u>Unique Clicks %</u>	<u>Total Clicks</u>	<u>Total Clicks %</u>
Group G	410	65	15.90%	87	21.20%	10	2.40%	11	2.70%
Group F	410	56	13.70%	74	18.00%	3	0.73%	3	0.73%
Group E	410	51	12.40%	107	26.10%	5	1.20%	6	1.50%
Group D	411	71	17.30%	119	29.00%	7	1.70%	7	1.70%
Group C	411	68	16.50%	110	26.80%	6	1.50%	8	1.90%
Group B	410	56	13.66%	89	21.90%	9	2.20%	9	2.20%
Group A	410	59	14.40%	78	19.00%	1	0.24%	1	0.24%
Mean		60.86	14.84%	94.86	23.14%	5.86	1.42%	6.43	1.57%
Minimum		51	12.40%	74	18.00%	1	.24%	1	.24%
Maximum		71	17.30%	119	29.00%	10	2.4%	11	2.70%
Std. Deviation		7.29	1.77	17.20	4.19%	3.185	0.77%	3.46	.84%
Range		20	4.90%	45	11.00%	9	2.16%	10	2.46%

Table 2					
<i>T-Test</i>					
	t	df	Sig. (2-tailed)	Mean Difference	95% Confidence
Unique Views	22.11	6	.000	61.57	54.76
Total Views	12.60	6	.000	100.14	80.69
Unique Clicks	5.82	6	.001	6.14	3.56
Total Clicks	5.85	6	.001	6.71	3.90

Discussion

The experiment data points us to believe that simple, educational emails with no additional marketing messaging or incentives will produce the highest effect on online grocery shopping trial. However, the views and total clicks were low in number, making it hard to come to a conclusion based on this data alone. The views rates were below industry average, which is 22% (Emfluence, 2017). Additional experiments should test this conclusion with larger email lists.

The survey discovered that free-home delivery is the most attractive self-reported incentive that would influence consumers to grocery shop online; however, since Sun Fresh did not possess the logistical capabilities to support home delivery at the time of the experiment, this incentive could not be tested. This presents an option for future study. Coupons were the second most popular self-reported incentive; however, this is not consistent with the experiment data. Although the email containing only the coupon received the highest total views rate, it did not result in a high clicks rate and none of the coupons were redeemed to the store during the experiment duration.

Limitations

Limitations of this study do exist. Demographic data could not be captured through the email experiment. It was self-reported later in the survey. The survey participants accounted for 8% of the total experiment participation group. Generation Z and young millennials were the least represented in the survey. Prior research shows that these combined generations average the most grocery shopping trips per month, and are more inclined to use digital grocery lists and coupons compared to other generations

(Acosta, 2018). This representation could account for the low clicks rate in the experiment and the low self-reported online grocery shopping trial rate in the survey. Additional research should include a larger representation of Generation Z and millennials.

In addition, this research did not analyze the values of incentives and the subsequent effects on consumer behavior. A coupon with one value was utilized in the experiment. The researcher did not test a variety of coupon values to discover which might be most effective. Coupon value and its effect on consumer behavior in regards to online grocery shopping could be an area of future research. There was an expiration date on the coupon to be used in one month's time. This study did not test multiple expiration dates, which could create a sense of urgency or additional value; this could be another area of future study.

Finally, this research did not answer whether consumers who start online grocery shopping with the retailers in the study become loyal customers. This study only looked at the information, persuasion, and initial decision phases of diffusion. It also did not measure diffusion over time, instead it took a timestamp measurement of the awareness, persuasion, and decision stages of diffusion. The experiment does not further study the formation of the entire S-curve of diffusion and specifically the final stage of diffusion, confirmation. This would be an opportunity for future research and an option for extended this current study.

Future Research Recommendations

Although email messaging is not a new marketing strategy, it consistently shows a successful return on investment for retailing and needs to be studied as online grocery

shopping grows in consumer adoption. Most studies that look at online grocery shopping growth examine large, digitally-savvy companies like Amazon. This research attempted to fill in the research gaps by focusing specifically on independent grocery retailers. The results show that independent grocery retailers need to be further studied to discover which incentives and marketing messages (if any) are effective in influencing online grocery shopping.

This research showed that simple, educational emails with no additional marketing messages or incentives were easy to understand and produced higher clicks rates. This research also discovered that coupons and free-home delivery were popular self-reported incentives. Educational emails, coupons, and free-home delivery all need to be tested in future studies to identify which of these tactics is most effective. By doing so, independent grocery retailers can determine how to use their marketing resources strategically to stay competitive in order to gain loyalty and new consumers in an omni-channel retail environment.

Managerial Implications

The researcher recommends independent grocery retailers send an initial educational email introducing the new technology to consumers in a simple, clean layout. This would be similar to the control Group G's email in this experiment. Then retailers should deploy an email marketing campaign with incentives such as coupons, free service, and, if possible, free delivery, combined with marketing messages such as OCRs.

Conclusion

The main purpose of this two-fold study was to test which incentives or messaging (if any) would motivate consumers to try online grocery shopping with

independent retailers by applying the diffusion theory. Utilizing email marketing as a tool, this study first conducted an experiment testing the effectiveness of two messaging tactics, online customer reviews (OCRs) and money-back guarantees, and two incentives, coupons and free online shopping service. OCRs carried a heavy focus in the experiment since consumers place a high emphasis on customer advocacy, which is the tendency of consumers to trust other consumers by reading their reviews online (Castrejon, 2017). Emails with the messaging of OCRs and a free service incentive were originally predicted to have the greatest effect on online grocery shopping trial of all of the seven iterations of emails that were tested. In contrast, the control group email, which tested no marketing messages or incentives, but contained only informational content about online grocery shopping, received the highest clicks rate to the online grocery shopping platform.

At the conclusion of the experiment, the second half of this study was deployed. This consisted of an email survey to experiment participants to analyze their opinions on online grocery adoption, and which marketing messages and incentives they found most valuable. The survey results hoped to confirm the findings of the experiment, but resulted in inconsistencies. The survey revealed that both respondents who had tried and who had not tried online grocery shopping all reported that free delivery and coupons would be the most attractive incentives to start online grocery shopping. During the experiment, none of the coupons were redeemed in online grocery shopping transactions.

The survey participants represented slightly more than 8% of the experiment population and the majority fit into the 50 to 69 year-old age bracket. Since this population does not shop online as much as the digital natives of the Generation Z and

millennial generation, this could account for the low clicks rate of the experiment emails. The population tested and surveyed could still feel a high level of uncertainty towards online grocery shopping, which could explain why informative emails were most attractive. The diffusion theory explains that high levels of uncertainty accounts for slower adoption (Rogers, 1983).

Therefore, closing the gap of uncertainty with educational email communications is an important tactic when launching a new technology for consumers, like online grocery shopping platforms. Once consumers are informed of the technology, marketers should test incentives such as free-delivery options (if the stores have the logistical capabilities) and coupons. They should reinforce these incentives with messaging of OCRs. The OCRs also help to minimize uncertainties, by emphasizing the safety and usability of the technology through the testimonials of other customers.

In conclusion, even though this research tested and surveyed a small demographic, it was a starting point to academically study independent grocery retailers in a natural setting. Additional investigation is necessary to confirm these findings. Going forward, this researcher would recommend that independent grocery retailers send an initial, awareness email message announcing the store's new platform and educating consumers on how to utilize it. This email should include a link to the platform for consumers to see the new technology. Then retailers should deploy an email marketing campaign that utilizes free shipping and coupons as incentives, along with messaging of OCRs. This combination of incentives and messaging is predicted to help independent grocery retailers secure a portion of the industry's online sales.

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Appendix A

<http://surveys.emfluence.com/D6816A2A-011D-48FB-A368-D86D58043E80>

Survey Track 1: Consumers indicating they did online grocery shop after receiving email communication from the store.

Q1: Have you tried online grocery shopping?

- Yes
- No

Q2: What influenced you to try online grocery shopping?

- I heard it was convenient
- I received a coupon to use on my online shopping order
- I received a free delivery offer
- Positive reviews from others
- Other (please specify)

Q3: Please rate your agreement with the following statements based on you online shopping experience with our store:

Scale:	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
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- I enjoyed my online grocery shopping experience
- I found online grocery shopping convenient
- I found online grocery shopping more time consuming than in-store shopping
- I would be willing to try online grocery shopping again
- I would encourage others to try online grocery shopping

Q4: Why did you or did you not enjoy your experience? (Write in answer)

Q5: Which of the following offers (if any) would influence you to online grocery shop again? (Click all that apply)

- Coupons
- Free home delivery
- Money-back guarantee
- Positive recommendations from others
- None
- Other (please specify)

Q6: Did you use a coupon or free delivery promotion when online grocery shopping?

- Yes
- No
- I can't remember

Survey Track 2: Consumers indicating they did not online grocery shop after receiving email communication from the store.

Q1: Have you tried online grocery shopping?

- Yes
- No

Q2: Why have you not tried online grocery shopping yet? (Click all that apply)

- I like in-store shopping
- I don't want to learn the technology
- I don't find it as convenient as in-store shopping
- It seems more expensive than in-store shopping

- I think it's faster to shop in-store
- Other (please specify)

Q3: Have you been offered any promotions or coupons to try online grocery shopping?

- Yes
- No
- I don't know

Q4: How likely are you to try online grocery shopping in the future?

- Very unlikely
- Somewhat unlikely
- Neither unlikely or likely
- Somewhat likely
- Very likely

Q5: Which of the following offers (if any) would influence you to try online grocery shopping in the future? (Click all that apply)

- Coupons
- Free home delivery
- Money-back guarantee
- Positive recommendations from others
- None
- Other (please specify)

All survey participants will receive the following questions:

Q1: Have you online shopped with any other grocery stores?

- Yes
- No
- I don't remember

Q2: If you have online shopped with other grocery stores, which stores did you shop with? (Write in answer)

Q3: How often do you shop with other grocery stores online?

- Never
- Rarely
- Sometimes
- Often
- Very Often

The following questions ask about your demographic information

Gender: Male, Female, or Other

Age:

- 20-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+

Your education level:

- Some high school education
- High school diploma

- Some college education
- Associate's degree
- Bachelor's degree
- Master's degree
- PhD degree

Your annual income:


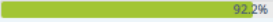
- Less than \$12,000
- \$12,001 - \$24,000
- \$24,001 – \$36,000
- \$36,001 - \$48,000
- \$48,001-\$60,000
- \$60,001 - \$72,000
- \$72,001- \$100,000
- More than \$100,000

Appendix B

Started: 154 : Completed: 145 94.2% 







Page 1

Have you tried online grocery shopping on our platform?

	Response Percent	Response Count
Yes	 7.8%	12
No	 92.2%	142
answered question		154
skipped question		0

Page 2

What influenced you to try online grocery shopping?

	Response Percent	Response Count
I heard it was convenient	 40.0%	4
I received a coupon to use on my online shopping order	 0%	0
I received a free service offer	 10.0%	1
Positive reviews from others	 0%	0
Money-back guarantee	 0%	0
Other (please specify)	 60.0%	6
Show Responses		
answered question		10
skipped question		144

Please rate your agreement with the following statements based on your online grocery shopping experience with our store

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Response Count
I enjoyed my online grocery shopping experience	0% (0)	0% (0)	30% (3)	50% (5)	20% (2)	10
I found online grocery shopping convenient	0% (0)	20% (2)	0% (0)	40% (4)	30% (3)	9
I found online grocery shopping more time-consuming than in-store shopping	10% (1)	50% (5)	10% (1)	30% (3)	0% (0)	10
I would be willing to try online grocery shopping again	0% (0)	0% (0)	20% (2)	30% (3)	50% (5)	10
I would encourage others to try online grocery shopping	0% (0)	0% (0)	20% (2)	20% (2)	60% (6)	10
answered question						10
skipped question						144

Why did you or did you not enjoy your experience?



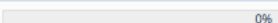
	Response Count
Hide Responses	6
6 responses	
The pick up process was a nightmare. Had to go inside and find customer service to tell them I had arrived. The number supplied to text on arrival did nothing. 2/8/18 1:14 PM (CDT) View Responses	
There were a few problems with duplicate items, and if I could view the sale as and click on items to buy them, that would be cool. Sometimes you have to go through too many pages trying to find what you want when in alphabetical order. Might try grouping by categories like in store. Overall, though, it's similar to Instacart, which is fine, and it's Sunfresh, which is close and a better store than the grocery store closest to me. 2/8/18 10:49 AM (CDT) View Responses	
I still want to see the actual product and compare to others on the shelf next to it. 2/8/18 9:47 AM (CDT) View Responses	
I did not complete my order because it was small, given the service fee. I plan to make larger online orders where the service fee is more economically applied. 2/8/18 7:39 AM (CDT) View Responses	
for the most part, I enjoyed it but some of the brands differed from what I selected and typically would purchase. 2/8/18 7:35 AM (CDT) View Responses	
Choice of product poorly designed. Example search "cure 81 ham" showed only Oscar Meyer packaged lunch meat and sugar dale ham shank. 2/8/18 7:31 AM (CDT) View Responses	
answered question	6
skipped question	148

Which of the following offers (if any) would influence you to online grocery shop again? (Click all that apply)

	Response Percent	Response Count
Coupons	<div><div></div></div> 44.4%	4
Free home delivery	<div><div></div></div> 55.6%	5
Money-back guarantee	<div><div></div></div> 22.2%	2
Positive recommendations from others	<div><div></div></div> 11.1%	1
None	<div><div></div></div> 11.1%	1
Other (please specify) Show Responses	<div><div></div></div> 33.3%	3
answered question		9
skipped question		145


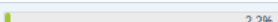
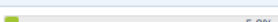
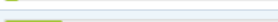
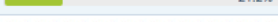
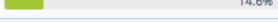
Other (please specify) Hide Responses	<div><div></div></div> 33.3%	3
3 responses		
Ability to pay with cash, EBT, debit. Some services only take credit cards. 2/8/18 10:49 AM (CDT) View Responses		
Percentage-based fee rather than fixed amount 2/8/18 7:39 AM (CDT) View Responses		
Improve product list and search. Allow entry of debit card. 2/8/18 7:31 AM (CDT) View Responses		

Did you use a coupon or free delivery promotion when online grocery shopping?

	Response Percent	Response Count
Yes	 11.1%	1
No	 88.9%	8
I can't remember	 0%	0
	answered question	9
	skipped question	145

Page 3

Why have you not tried online grocery shopping yet? (Click all that apply)

	Response Percent	Response Count
I like in-store shopping	 51.8%	71
I don't want to learn the technology	 2.2%	3
I don't find it as convenient as in-store shopping	 5.8%	8
It seems more expensive than in-store shopping	 21.2%	29
I think it's fast to shop in-store	 14.6%	20
Other (please specify) Show Responses	 33.6%	46
	answered question	137
	skipped question	17

Other (please specify) Hide Responses	 33.6%	46
--	---	----

46 responses

I live to far away from the store

2/17/18 9:10 AM (CDT) [View Responses](#)

I have online shopped with other stores, but not yet with Sun Fresh

2/16/18 9:35 AM (CDT) [View Responses](#)

No reason

2/15/18 9:29 PM (CDT) [View Responses](#)

didn't know it was available

2/15/18 7:14 PM (CDT) [View Responses](#)

I didn't know you have online shopping.

2/15/18 4:37 PM (CDT) [View Responses](#)

I take a cab and wouldn't save

2/15/18 3:33 PM (CDT) [View Responses](#)

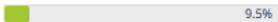
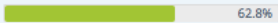
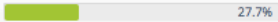
I don't trust the staff at the Sunfresh I frequent to pick quality items on my behalf.

2/15/18 11:17 AM (CDT) [View Responses](#)

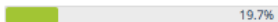
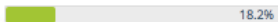
I find better bargains when in the store.

2/15/18 9:14 AM (CDT) [View Responses](#)



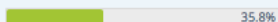
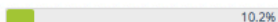
Have you been offered any promotions or coupons to try online grocery shopping?

	Response Percent	Response Count
Yes	 9.5%	13
No	 62.8%	86
I don't know	 27.7%	38
answered question		137
skipped question		17

How likely are you to try online grocery shopping in the future?

	Response Percent	Response Count
Very unlikely	 19.7%	27
Somewhat unlikely	 24.8%	34
Neither unlikely or likely	 18.2%	25
Somewhat likely	 24.1%	33
Very likely	 13.1%	18
answered question		137
skipped question		17

Which of the following offers (if any) would influence you to online grocery shopping in the future? (Click all that apply)

	Response Percent	Response Count
Coupons	 58.4%	80
Free home delivery	 72.3%	99
Money-back guarantee	 28.5%	39
Positive recommendations from others	 35.8%	49
None	 10.2%	14
Other (please specify) Show Responses	 8.8%	12
answered question		137
skipped question		17

Other (please specify)		12
Hide Responses	<div><div></div></div> 8.8%	

12 responses
I like my grocery store outing. 2/15/18 8:46 AM (CDT) View Responses
costs 2/9/18 8:56 PM (CDT) View Responses
If I was physically unable to shop myself. Knock on wood! 2/9/18 1:51 PM (CDT) View Responses
The ability to order pre-cooked/pre made meals from the deli 2/8/18 2:56 PM (CDT) View Responses
A website that works with my android phone 2/8/18 11:45 AM (CDT) View Responses
Do not need an incentive. WILL TRY 2/8/18 9:49 AM (CDT) View Responses
Allowing food stamps to be used 2/8/18 9:44 AM (CDT) View Responses
good coupons, not this buy 2 get 20 cents off business... 2/8/18 9:31 AM (CDT) View Responses

Page 4

Have you online shopped with any other grocery stores?

	Response Percent	Response Count
Yes	<div><div></div></div> 21.5%	31
No	<div><div></div></div> 78.5%	113
I don't remember	<div><div></div></div> 0%	0
	answered question	144
	skipped question	10

If you have online shopped with other grocery stores, which stores did you shop with?

	Response Count
Show Responses	33
answered question	33
skipped question	121

33 responses

Price Chopper and Hy-Vee
2/16/18 9:35 AM (CDT) [View Responses](#)

Amazon
2/15/18 10:47 PM (CDT) [View Responses](#)

Door to door organics amazon walmart
2/15/18 9:29 PM (CDT) [View Responses](#)

jet.com
2/15/18 7:14 PM (CDT) [View Responses](#)





Walmart
2/15/18 4:37 PM (CDT) [View Responses](#)

Costco
2/15/18 3:33 PM (CDT) [View Responses](#)



stores in Dallas, TX
2/15/18 3:29 PM (CDT) [View Responses](#)

Hy-Vee
2/15/18 11:17 AM (CDT) [View Responses](#)


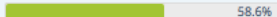
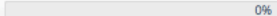
How often do you shop with other grocery stores online?

	Response Percent	Response Count
Never	 71.6%	101
Rarely	 11.3%	16
Sometimes	 9.2%	13
Often	 6.4%	9
Very often	 1.4%	2
answered question		141
skipped question		13

How often do you shop for other product/services besides groceries online?

	Response Percent	Response Count
Never	 5.6%	8
Rarely	 11.1%	16
Sometimes	 32.6%	47
Often	 23.6%	34
Very often	 27.1%	39
answered question		144
skipped question		10

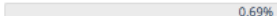
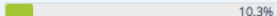
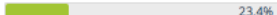
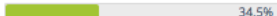
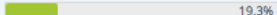
Gender

	Response Percent	Response Count
Male	 41.4%	60
Female	 58.6%	85
Other	 0%	0
	answered question	145
	skipped question	9


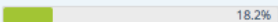

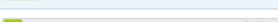
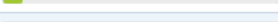
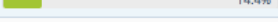
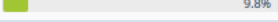
Age

	Response Percent	Response Count
20-29	 6.3%	9
30-39	 14.6%	21
40-49	 17.4%	25
50-59	 18.8%	27
60-69	 30.6%	44
70+	 12.5%	18
	answered question	144
	skipped question	10

Your education level:

	Response Percent	Response Count
Some high school education	 0.69%	1
High school diploma	 10.3%	15
Some college education, but no degree earned	 23.4%	34
Associate's degree	 8.3%	12
Bachelor's degree	 34.5%	50
Master's degree	 19.3%	28
PhD degree	 3.4%	5
	answered question	145
	skipped question	9

Your annual income:

	Response Percent	Response Count
Less than \$12,000	 6.1%	8
\$12,001 - \$24,000	 18.2%	24
\$24,001 - \$36,000	 16.7%	22
\$36,001 - \$48,000	 13.6%	18
\$48,001 - \$60,000	 7.6%	10
\$60,001 - \$72,000	 14.4%	19
\$72,001 - \$100,000	 9.8%	13
More than \$100,000	 13.6%	18
answered question		132
skipped question		22