**Influencing online grocery innovation:
Anti-choice as a trigger for activity fragmentation and multi-tasking**

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Abstract

This paper reveals how activity fragmentation and multi-tasking are used as tools of consumer anti-choice in the online grocery sector: facilitated by new technology practices that positively encourage anti-choice. This is demonstrated through five long-term ethnographic case studies of households in the Portsmouth area of England. All the respondents made some form of conscious effort to minimize the amount of time they spent in 'big box' grocery stores. They hence spend more time at home in planning, searching, socializing online, cumulating and fulfilling internet orders than if they had visited a store: something that all are well placed to do. The findings suggest the need for constant innovation by internet grocers if they are to remain in tune with dynamic consumer lifestyles and advances in technology. Examples of upcoming technologies requiring retailers to re-think their internet strategies are discussed in view of the possibilities offered by activity fragmentation and multi-tasking.

Keywords

Online grocery, activity fragmentation, multitasking, anti-choice

Biographies

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Introduction

Until recently, the UK e-grocery market has been limited relative to levels of purchasing of non-food items via the internet. Market research findings now indicate that a growing proportion of the UK population – around 11 to 13% - regularly shop online for groceries [1]. Market research studies suggest that the typical online shopper lives in a dual-income household and is between 25 and 34 years of age. They have children, have access to one or more cars, and live in suburban areas where physical access to supermarkets is not a problem. Such shoppers informed the market researchers that online grocery shopping easily enabled them to spend more time on other activities and offered them more convenient shopping [2]. We offer a different methodological perspective from such reporting of aggregated behaviors. We primarily stress the push factors driving some shoppers away from stores before considering technological pull.

Arguably, one reason why online grocery shopping developed more slowly than non-food is that food shopping involves the purchase of a basket of goods [3] that may be both perishable and heterogeneous [4]. Internet shopping for groceries poses very different purchasing challenges when compared with online purchases of standard items such as books, CDs and DVDs [5]. Furthermore, food shopping is enmeshed in habits and in everyday routines, and intertwined within a nexus of related household practices – such as meal planning, preparation and cooking - all of which can now be mediated by technologies [6] [7] [8]. Social media, too, allow truly demand-led models to emerge such that consumers can more proactively decide what they buy and where: leading to further citizen empowerment [9]. Blogs facilitate sharing of personal insights on food quality and suppliers (and disseminate information on food

‘scares’) whilst Apps can assist on topics from store finding to calorie counting: increasing food security.

Study aims

Drawing on in-depth case study analysis, the paper has two main aims. First, it seeks to show how, and why, local shopping opportunities can help to push consumers to actively engage with the internet for grocery shopping. We detect voluntary, active, resistance to the hegemonic ‘big box’ format in UK food retailing; the free-standing, car-based superstore. Complex new behaviors may be a manifestation of consumer choice abrogation, or positive ‘anti-choice’ [10] [11]. Second, the paper uses five personal case studies to reveal how consumers’ online shopping practices become interwoven with the complex rhythms and domestic routines of everyday household life. Together, these trends pose new challenges for store-based retailers. Anti-choice behaviors are symptomatic of an incompatibility between retail stores and certain consumer lifestyles [12]. At-store shopping is dissonant with, or antagonistic to, their beliefs and inclinations, choice sets and overall ideological views of the consumption process [13] [14] [15] [16]. We also utilize the work of Bannister and Hogg [17] on symbolic consumption, self concept, self-esteem, self image and so on [18] [19] [20]. Emotion-laden decisions over choice, non-choice or refusal are, we argue, routine aspects of everyday consumption practices and involve conflicting goals and objectives. Non-choice and anti-choice may result if available options are incompatible with one’s lifestyle choices and beliefs [21] [22]. Note that global and local food scares are creating opportunities online for greater supply chain and information transparency [23]. Hogg states “*Anti choices included products and services which were positively not chosen because they were seen as incompatible and/or inconsistent (p 135) and (p 149) non choices were ...connected to a*

consumer's ability to afford a particular product choice...., abandonment avoidance and aversion each expressed different degrees of anti choice or ... refusal.... of taste. Aversion was the strongest expression” [10].

The essence of non-choice lies with *conscious action*: the act of *not* buying an item or *not* using a service. Nowadays, many services involve conscious choices that mirror topics enumerated by Bannister and Hogg (and others; above). Anti-choice has also been researched through studies of organized consumer boycotts. It is within this complex milieu that we approach the topic of internet grocery shopping on the basis of which we show how anti-choice and resistance are enacted locally. Drawing on Peñaloza and Price’s [24] seminal work, this growing field of research contributes to a deeper understanding of different consumption possibilities and thus provides an alternative view of what future consumption may involve. Consumption is characterized as “the process by which people acquire, use, and dispose of commodified goods (including ideas, services, products, brands, and experiences)” Lee et al, [11: p11]. Though research has begun to stress the importance of anti-choice or positive *non-consumption*, two major gaps in the e-grocery literature remain.

Firstly, most anti-choice research covers behavior off-line and therefore more research is needed about how this links to online activity. We detect activity fragmentation and multi-tasking which have been categorized into four areas: audience, marketing, distribution and media channel. This is not just non-adoption of technology but a facilitator of positive non-consumption/ rejection of available off-line choices (see *coping with change*, below). Secondly, the grocery literature, in particular, has overlooked anti-choice in favor of topics such as the supply chain, internationalization and pricing. Accordingly, everyday anti-choice has yet to be fully theorized and better linked to how future food consumption practices may develop.

The paper is structured as follows: we begin by providing a description of the broader backdrop to the present research. In the context of grocery shopping, a review of extant research from the social sciences focusing on the home/internet shopping interface is then presented. Here the relevance of the anti-choice literature is considered. The methodological approach adopted in this study is then briefly described and justified. The presentation of five case studies focusing on consumers' internet grocery shopping practices then follows. Empirical insights illustrate multi-tasking and activity fragmentation behaviors across different household situations and domestic circumstances. Final section concludes by discussing the implications of this study and suggestions for further research.

The research context: Portsmouth (1981-2006)

Research on 'big box' superstore shopping in the Portsmouth area commenced over 30 years ago when large grocery store formats were still new to the region. Early at-store research revealed who was shopping, how they reached the store, what they bought and what were their likes and dislikes [25]. This work has periodically been reinvestigated: most significantly in 2002-2006. In addition to revisiting those same stores, use of focus groups and individual household respondents was included: as reported in Clarke et al. [26] and, especially, Jackson et al. [8]. Freestanding, car-based, stores now take around 75% of the total UK grocery trade [27] and, by 2006, just four major chains dominated – Tesco, ASDA/Wal-Mart, Sainsbury's and Safeway/Morrisons – all included in the 2002-2006 studies.

Research revealed that consumers were alert to what their choice of store 'says about them' and they would abrogate apparently-suitable store choices because of routines

or preferences. Crucially for us, respondents made judgments, often linked to their social class background, about how “nice” and “pleasant” a store was. They indicated store environments where they felt ‘comfortable’: a point upon which we later expand. Evidently, food provisioning is laden with moral and ethical undertones related to family and household [28] [6] [7]. Price awareness – often seen as the key criterion - was not limited to poorer consumers: most shoppers traded-off *price* against *quality* to achieve *value*. Subsequently, a further 18 month phase of Portsmouth-area research was embarked upon in order to examine the e-grocery phenomenon and how urban food supply is mediated by technology.

The home / internet shopping interface

Our ethnographic study confirmed that the internet and related technologies are themselves cultural artifacts that play an important role in consumers’ everyday lives as objects of material culture, ownership and display [29] [30]. Furthermore, we found that consumers’ use of the internet leads to a blurring of the boundaries between work, leisure, entertainment and shopping [31] [32]. The internet and related technologies had not only served to increase the integration between the spheres of home, leisure, work and other spaces, but had created new spaces, new ways of communicating and consuming.

Much of the literature on grocery shopping focuses on the motivational factors that affect consumers’ choice of retail channels (see, for example [33]). Already, consumers are faced with many decisions regarding choice of retailers, store formats and layouts, between manufacturer’s brands and retailer’s own-label products. The internet broadens out choices beyond those offered by local stores. This applies when accessing products and brands through retailer’s websites and interactive digital

television (iDTV), and potentially through more remote channels facilitated through m-commerce applications, and intelligent appliances [34]. Virtual technologies are seen by many as lowering or removing familiar constraints – such as such as store access, mobility, and time – that apply to local store-based choices.

Decision-making, however, is highly individual and situated within specific socio-spatial and temporal contexts [26]. Individual household contexts may lead to real or perceived constraints that could even undermine consumers' abilities to make decisions at all. The relationship between consumers and online retailers is further mediated by product/ service/ information at one end and, at the other, the availability and efficiency of appropriate technology within the home. Now that broadband/WiFi is established in the UK, internet technologies permit individuals to move away from the traditional two-way flow of communication and towards multi-tasking and multi-real time communication. Technological advances have facilitated the link to QR codes and Smartphones. In South Korea, Tesco/ Homeplus has successfully tested subway station posters with QR codes as alternative virtual stores [35] [36]. 3D technology and augmented reality can also facilitate shoppers' in-store choice processes.

Coping with change: fostering innovation

Despite ongoing interest in the household/technology debate, much existing research has treated the topics of a) domestication of technologies and b) shopping facilitated via the internet as two distinct fields of inquiry. Meanwhile, other research has drawn on literature from time-geography to focus on time-space constraints that individuals face in their daily lives [37] [38]. Their findings imply that activity fragmentation and multi-tasking are likely to grow in step with growing internet usage. Activity

fragmentation indicates its disaggregation into smaller bundles of acts that can then be performed in multiple places, at different times and in new sequences [39] [40] [41]. Multi-tasking, often referred to as “contamination” in the sociological literature [42] [43], concerns instances when several activities are conducted simultaneously – for example, reading, chatting on a mobile telephone, or using a computer whilst watching television [44]. Consumers are facing different consumption challenges. (a) from an audience perspective, in addition to traditional family demands come an added need for choice and flexibility reflecting emergent preferences and lifestyles; (b) from a marketing perspective, international media and TV programs (e.g. on obesity) are encouraging consumers to engage in new cooking styles and types; (c) from a distribution channel perspective, frozen vs. fresh; ready vs. uncooked; premium vs. low cost, manufacturer brand vs. own brand, (and vegetarian, anti-allergenic products etc) are all now competing for market share. The supermarket, once the most common food store format, is challenged by larger hypermarkets, by smaller convenience stores and by home delivery (or click and collect); (d) from a media channel perspective, the spectrum of formats is also rapidly evolving (both offline and online) pushed by the forces of globalization (e.g. *Ipad* used as cook book). As issues in food security and health and wellness arise, a greater supply of information (knowledge sharing) from non-institutionalized agents (blogs) or experts (dieticians) is re-defining the ecosystem (45) hopefully increasing citizen empowerment. Indeed, individual data from their shopping personal shopping histories should help consumers to reflect upon and adapt their shopping strategies.

Methodological considerations

Before outlining our chosen methodology, it is useful to consider an approach that we rejected. In 2006 the UK Competition Commission looked at the Groceries market from a perspective whereby all grocery shoppers were regarded as economically rational, utility-maximizing and effort-minimizing. Individuals who were already abrogating real-world choices could not be accommodated their approach. They would surely view internet grocery shopping purely as an economically-rational choice devoid of quality, new product and online social considerations. Our approach, conversely, fully situates food shopping in the everyday life of real individuals: seeking to make sense of a complex, highly personal activity. We sought to explore which technology-related processes were occurring, what the push factors as well as the precise situations were wherein they took place. It was therefore important to research particular household and family circumstances, both on a day-to-day and a more discontinuous basis, that lend themselves to consumers adopting the internet for grocery shopping purposes. For the 18-month in-depth study, eight households that shopped online for groceries were recruited – located in two contrasted Portsmouth neighborhoods. The data collection focused on the (self-identified) main grocery shopper in each household. Given the richness and sheer volume of the empirical material collected, just five of these households were selected for presentation here. Fuller detail on these, and the three remaining cases, can be found elsewhere [46].

Methods and Analysis

Taking the approach of methodological “bricolage” [47]; our study used multiple complementary, consumer-focused, ethnographic methods [48]. This included repeated interviews, accompanied shopping trips (in-store and online), diaries, kitchen visits and photographic evidence. Issues raised were built upon as the study

progressed and the data set was analyzed using a combination of Spiggle's [49] analytical framework and "grounded theory" [50] to identify emerging thematic relationships [51]. First, we read the transcripts and familiarized ourselves with the data, (open coding, [52]). Second, the emergent themes in the data (each author's own observations) were compared with more abstract concepts in the literature (axial coding, [53 p105] in order to construct a final thematic framework for analysis. This inductive process identified the elements that make up the collective cultural register in the field. Commutation tests and paradigmatic clustering identified initial groupings [54 p99]: ultimately leading to mutually-exclusive categories. Third, indexing and selective coding were conducted and the thematic framework was systematically applied to the data. Fourth, a picture of the data as a whole was built and finally interpretation was undertaken. The findings are classified by "patterns and recurring organizations" emerging from the analysis [55 p177]. Given the ethnographic goal of "thick descriptions" [56], the dataset took the form of richly contextualized, ideographic, extended cases which we next outline.

Empirical studies

It was important to accompany respondents in various locations because technology usage may be geographically constrained: the most revelatory were the necessary trips made to supermarkets by respondents who otherwise sought to avoid them. Note that only one of our five respondents worked from home – and much of her work activity involved travelling locally. Essentially, none of our respondents was drawn from the 'stereotypical' group - young married couple with children - that the market research literature identified. Furthermore, it was analysis of the in-store comments of respondent Nigel that most clearly alerted us to anti-choice and resistance.

“Nigel”

Nigel, a young professional living in a shared house, was explicit that his use of the internet was an expression of his *“hatred”* of supermarkets.

(named store) is, quite frankly, appalling and I would never go.... too big and too many people ... yuk...

(Kitchen visit)

Although Nigel liked the ‘hard’ discount retailers in the area, such as Aldi and Lidl, this was largely because he found fewer other shoppers in such outlets. Whereas: *“I think Waitrose is lovely... (but) it is other people, – I can’t stand other shoppers!”* (at home interview).

The push factor in Nigel’s use of the internet for grocery shopping was not so much the shops themselves as his dislike of fellow shoppers. This was a topic which he embellished when accompanied shopping in-store: *“....I food shop online: ...I can get the majority of stuff that I want... without having to put up withscreaming kids”*.

Despite one accompanied shopping trip being conducted at a time and day that would normally be quiet, an untypically busy and crowded store led Nigel to consider abandoning the entire shopping trip. *“OK, that’s it. I’ve got to get out of here... I’ll come back some other time... There’s too many people, it’s far too busy... look at the length of this queue... I’m tempted to put half of this back...”* (accompanied in-store shopping trip).

If Nigel needed to shop in-store he would *“actively go out of [his] way to avoid busy times”* by shopping very early in the morning before work or late at night: indicative

of how his store-based grocery shopping habits and routines were underpinned by efforts to “*shun*” other shoppers.

Note, too, that Nigel was conscious of the realities of online shopping ... *“I don’t actually think that food shopping online is necessarily convenient per se... you have to think what you want for the next couple of weeks ahead and it takes a while to browse and buy... then normally a couple of more days until the (delivery)...”* (at home interview).

Essentially, Nigel accepted activity fragmentation as a price to be paid in order to avoid having to shop alongside others. His is basic technology usage: Nigel shops much as he would have done in-store. There is no product comparison, no new product searches; no further information is assembled but, above all, no sharing with other shoppers.

“Ann and Graham”

Ann and Graham, both in their mid-twenties, lived in a two bedroom apartment. Ann was a schoolteacher, Graham a doctoral researcher at a local University. Both had a car, although Ann’s was unreliable so she often used Graham’s car to commute to school. We concede that this may have been relevant to her lower usage of car-based grocery stores. Ann stated, illustrating the familiarity of younger people with ICT technologies: *“...it is probably easier to think of things that we don’t do online between us... I shop.. (and) Graham especially is never off the Internet... he’s way better at doing things online than me...I’m no way as good as him... it was brilliant when I found out that ASDA started delivering in the area – I was straight on their website... it was most obvious thing to do....”* [at home interview].

ICTs and the internet were, then, a fully established part of their everyday lives yet involved some conflicts over access to the technology. For example, Ann had to ask “*permission*” to use Graham’s PC: which he sometimes refused. Ann also felt she did not have Graham’s level of technological knowledge needed in order to shop online... “*properly*’... *he’s way better at doing things online than me....*” [accompanied online shopping trip].

And: “*If I need to do a shop I have to wait until he’s not using the computer... He won’t do it [shop online for groceries] and I prefer it if he didn’t... On a few occasions I’ve ..ended up going into town and using an internet café to shop online... it saves a few arguments*” [kitchen visit].

So, Ann would leave home to use an internet café to order online groceries even though this may well have been further away than the nearest food superstore. Yet Ann remained certain that shopping online for groceries made her everyday life “*easier*”. Clearly her internet shopping practices were deeply entwined with her other day-to-day activities and had become part of her routines. What Ann certainly did not do was use the internet at home so that she could free up time to go shopping in store. Here a second level of technology usage can be detected: though, at time of interview, Ann and Graham were not using multiple devices and media. Technology was the facilitator but engagement with tools such as price comparators, reviews was evidenced. The level of socialization remained offline: at the household level and between the two respondents.

“Angie and Isabelle”:

Angie worked as a consultant. A single, working mother, she lived with her daughter, Isabelle, in a middle-class neighborhood. Angie kept a laptop computer, for both work and personal use, in a dedicated office space and, whilst Isabelle had her own PC, she sometimes used Angie’s laptop. Although Angie completed their fortnightly online grocery purchases, Isabelle also added items when requested to: *“if Isabelle is using my machine, and if I remember something... we need, I’ll ask her to put it on the list... she sometimes puts things on there that she wants..... I usually say it’s fine – she’s a sensible girl, I trust her”* [kitchen visit]. Angie often felt time-constrained in attempting to perform her everyday routines. In part, this led to a strong dislike of shopping using supermarkets: *“I’d much rather be doing something else [than grocery shopping]... like poking my own eye out!... it takes too long... often too many people... it’s rubbish really”* [accompanied in-store shopping trip]. The reference to *too many other people* echoed the sentiments of Nigel who often focused his objections more on other shoppers than on the store itself. Angie was therefore *“delighted”* when retailers took the *“pressure off”* her by delivering groceries to her home. This meant she shopped for fewer items and hence more quickly whenever she needed to go in store to supplement her online grocery shop: *“shopping online [for groceries] is great for me ... it means that I buy things... without having to carry them home”* [at home interview]. Furthermore, shopping at home via the internet also enabled Angie to spend more *“quality time”* with Isabelle: *[Internet shopping] is great because, say, .. (we) want to do something together and we’re relaxing ...in front of the TV – I don’t have to get dressed (to go out shopping)”* [at home interview].

On several occasions, Angie talked about having to ‘balance’ her own work and leisure time around Isabelle’s extra-curricular activities and hobbies. Hence her visits to local supermarkets usually took place on weekdays since, at weekends, supermarkets were, in her opinion, “*far too busy... and annoying*”. Angie wished to reserve weekends for “*...doing family things*” but clearly exhibited time-fragmenting behaviors. This included, for example, Angie and Isabelle watching their favorite television programs together even as Angie shopped via the internet for groceries: “*Sunday: Sat down with the laptop in front of (television) with Isabelle. Logged on to Tesco’s website..... edited my regular items, added a few more ...*” [internet usage diary]. Angie gave numerous examples of how she could use in-home technology and time-reorganization in order to avoid physically going shopping. Here, a third level of interaction with technologies is observed. Angie uses technologies to facilitate time management - identifying clearly the advantages of home delivery (no other shoppers, no need to go to the store, no need to park, no need to load goods, no need to select a specific time to shop). Furthermore, e-shopping is used as socialization medium: both respondents get actively involved with the medium and the channel. Activities such as knowledge sharing mean that the Tesco website has become more than a list of products.

“*Rachael*”:

Rachael, a single woman in her late forties, lived in a large detached house in an affluent neighborhood. Rachael’s work was based primarily at home – but she estimated that approximately half of her working time was spent “*on the road*” visiting companies and so: “*no one week was ever exactly the same*”. She had a home office with a PC that she used for work purposes, particularly for emailing and

accessing the internet. Her working practices did not involve a “*typical 9am to 5pm day*” so her store-based grocery shopping was fitted in around work commitments: “*I always go shopping at different times. .if.. I’m on my way home (about four o’clock)...because it won’t be as busy as if I wait till six..... that’s why it’s different times, or ..I’ll go to Tesco’s first and then do (a task)*” [kitchen visit].

Like others, Rachael avoided times when other shoppers were more likely to be in store despite the fact that she could not always plan her trips. Other people would make the shopping process longer than necessary, which “*...could make me late for another appointment... therefore...I will try and avoid times [in stores] .. I know that there will be loads of other people that will annoy me at the check-out queue, particularly shuffling old people*” [at home interview]. The singling-out of older people as impediments to one’s at-store shopping precisely echoes negative comments made by Nigel.

Rachael started grocery shopping online: “*just out of interest really...I like the distraction from doing necessary routine tasks*” [internet usage diary] also, she seldom shopped for groceries outside the working week. It was also evident that Rachael followed the time-fragmenting pattern of building an order online over an extended period of time rather than in one single process. Rachael would incrementally add items to her online shopping basket in between undertaking work tasks “*Monday: Started to prepare my shopping from Sainsbury’s [online]... and will add to or possibly deduct from prior to placing the order in about 10 days... (order placed Friday – bored ☺... I also added wine on offer...)*” [shopping diary]. Rachael managed the online grocery process in a way that avoided having to make

frequent small purchases which could still take place at large supermarkets. She felt she had to be “*very planned and organized*” in her online purchasing decisions: “*because..... I do quite a lot of my grocery shopping over the internet I need to be organized ... I have to think about what I buy a lot more*” [kitchen visit]. Here a further aspect, linked to the technological opportunities of ‘search’, is found. We may infer that Rachel could be trading-off between offline product availability and online choice. The nature of her job also encouraged her to ‘pause online’ via multiple short sessions. Fortuitously, during one such pause, a special offer emerged that she was able to incorporate. It may be that she submitted her order early to ensure availability. Note that well-advertised special offers often remain available online even if sold out in-store.

“Mary”

Mary, a widow in her mid-fifties, and a car-owner was the one respondent who could most easily shop in large local stores at any time of her choosing. Mary, like Nigel, expressed reservations about the size of stores – and if she did have to shop at-store for certain key items she was selective in her choice of outlet: “*I would rather go to ASDA..., look myself or go to the butcher and get him to pick something nice for me....*” (Kitchen visit). And “*I adore Waitrose’s food, ...I love the store because it is small and inviting, and the staff are always friendly and approachable, everything is laid out well ...It’s great to shop there...*” (kitchen visit).

Note that both the stores alluded to above are located in the nearby district shopping center. It was when discussing her shopping online with Tesco.com, that Mary revealed that she preferred to use that center rather than shop at a large Tesco *EXTRA* superstore or the even larger ASDA/Walmart supercenter in a more remote, highway-oriented location since both were “*far too large... and I get far too confused as they*

sell everything... I get burned out with the choices". Research from 1985 [57 p201] interviewed a much larger sample of local respondents and compared Mary's ASDA with what is now the ASDA/Walmart supercenter – and concluded that the smaller store size was preferred: "... the clear advantage of the ASDA (Waterlooville) superstore...(is) the perception of the *right size of store*ASDA has a size in which consumers are comfortable, ...hypermarkets are often criticized as being too big". Two further points flow: one of which refers back to Hogg's words: "*Aversion was the strongest expression*". The 1985 study focused on patrons who actively used the two stores in question so it would not have picked up on those who were already staying away because they felt either store to be too big. The second is that entering a store that the shopper regards as too big leads to what Schwartz [58] refers to the 'paradox of choice' whereby too much choice can lead consumers to abrogate choice altogether and refuse to buy – a clear manifestation of anti-choice. Confirming the local research conducted nearly 30 years ago, respected retail trade Journal THE GROCER [59 p6] reported the president of Unilever Europe describing the grocery sections of supermarkets as "un-navigable" and that "we've basically built massive warehouses". Mary reflects shoppers who are still traditional in their tastes and preferences. They may, however, use the internet to reconnect with traditional or regional products: consuming what they perceive as proper food encouraged by reviews from 'proper' shoppers (i.e with preferences similar to their own).

Case study discussion:

All of the case studies demonstrated multi-tasking and activity fragmentation, though the two were very much intertwined. Shopping online is inherently a fragmented process that includes searching, evaluating alternatives, selection, purchase, delivery

and social consumption. Rather than being conducted in a linear sequence, shopping online for groceries was mostly carried out in a disjointed manner. Evidently, shopping for groceries via the Internet can be a means to *reorganize* time rather than to *save* it. The user coordinates a plethora of routines and rituals both within and beyond the household. Also, a trip to the shops could well consume less time in total than at-home, time-and-technology management. Our respondents made clear, unprompted, statements about disliking aspects of the in-store shopping experience at the largest of stores: especially their size and the other shoppers who were encountered. Yet, over the past 40 years, the large, freestanding food superstore has become the hegemonic retail format in Britain. They are increasingly hard to avoid yet our respondents proactively sought ways to avoid them: suggesting a dissonance between personal and corporate agendas. Market-leader Tesco particularly benefited from superstore growth in the last two decades but, in 2012, CEO Philip Clarke announced their first profits fall in 20 years and made other points that were picked up by the trade press. Given the huge implications for future property development/investment *Estates Gazette* [60] was quick to write a feature article about the Tesco announcement. They described it as ‘the end of the space race’ and a ‘Tesco bombshell’ and suggested “unilaterally, Tesco has called an end to the space race.....bigger is not better...” adding “Carrefour (too)...says the future is in smaller, local, stores”.

The largest UK foodstores offer a one-size fits-all solution that clearly does not fit with our respondents who used technology to evade certain stores or to look for other modes of consumption. Large UK foodstores also fail to chime with an increasingly unequal and fragmented society where many seek to keep away from their fellow citizens as much as possible. Conversely, Angie and Isabelle probably shopped more

together online than they would do in a grocery store. Overall, our findings also pose questions for store-building programs: for example do “frugal consumers dining at home more, with premium ranges benefitting” [61] need to have bought food in a store? Technology-savvy consumers will be able – if they so choose and we doubt if all our respondents will - to shop from anywhere at any time whilst broadening their choices as new technology-driven providers enter the sector.

The future?

With technological acceleration, abrogation, anti-choice, fragmentation and multitasking becoming increasingly feasible, where might the future lie? Note that, currently, uptake is very uneven. If e-grocery shopping is to engage with every household member, then retailers should facilitate the use of different information technologies (even within the same household) to communicate and keep updated in real time. Under such ‘modularity’ of technologies, communication is integrated and adapted to suit the different needs and an ecosystem is developed. More work is needed on interfacing householder technology with that of retailers’ systems. This should improve as M-technology (e.g., Tablets and Smartphones) and smart televisions emerge as further tools for facilitating inclusion. They may even, at the top-end, interface with intelligent appliances.

The increasing “pull” of technology

We drew on five case studies primarily to exemplify how the at-store food offer in our local study area was generating anti-choice or resistance and helping to drive some shoppers into the arms of e-grocery shopping. It is equally evident that, in addition to such ‘push’ factors, there is the ‘pull’ of technology. Central to grocery retail futures will be the embedding of emergent technologies within consumers’ daily routines [62]. Examples of management innovation pushing the current consumption and

policy boundaries already exist. In France, Carrefour has successfully developed a drive-through internet shopping model. Consumer ordering online for at-store pick-up ('click and collect') is predictably popular with the retailers. This system pushes the cost of home-shop-home travel back onto the shopper and also removes the complexities and cost of home delivery. In 2012 UK Department Store chain *John Lewis* – which also runs *Waitrose* – announced that it would offer delivery of non-food items to corner shops or post offices. Product innovations are essential in attracting spend and, as internet grocery shopping increases, so the Ocado model of sourcing from dedicated locations rather than in-store picking may increase. Indeed, as e-grocery shopping rises so does in-store congestion caused by staff picking for home delivery. This may be one reason why Morrisons, the only one of the Big 4 without an online service, announced in March , 2013 that it was in discussions with Ocado.

Technology and labeling may enhance citizen empowerment by allowing consumers to know what is really in their food - especially in pre-prepared meals. This topic rose to prominence in 2013 with the so-called horsemeat burger scandal that involved pan-European meat supply chains. Elsewhere, smart-television offers new possibilities not only for shopping but also for edutainment and training of consumers so they understand how to use products appropriately. Such technological developments can augment reality and help to acquire cooking skills. Online food culture is developing rapidly and creating new global demands.

Conclusions

The findings from the 18 month ethnographic research suggest, in the case of e-grocery, that technology-mediated interaction is creating new types of fragmented shopper behaviors. Online grocery shopping first of all empowers consumers to choose the channel they prefer depending on their lifestyle at that precise point in time (back and forth behaviors). We detected e-grocery shopping patterns which demonstrated that the 'big box'-based status quo may suit fewer and fewer shoppers in modern Britain. Second, technologies offer a practical alternative [63] to those who exercise anti-choice in order to avoid large stores. Indeed, regarding food security and sustainability, a wider search function – 'relevant choices'- is now just a click away. Control over the range of goods, supply chain options and of choice supplier may be slipping away from retailers. Third, socio-cultural capital - evolving online - is allowing consumers to compare not only price and quantity but, more importantly, quality and functionality of products from a set of independent, non- institutionalized agents (review and feedback functions). This ecosystem richness is regularly leveraged (Apps, video and photos). We should, of course, bear in mind that the UK's major retailers currently dominate UK internet grocery provision and may react rapidly if they sense potential loss of market control. Innovations – as with Tesco learning from Korea or Carrefour's 'click and collect' facility in France – may involve strategies tested out across the world. It would be interesting to know if the major retailers feel in control of the more socially-oriented internet platform and if, in future, they will play it safe or innovate. That said, retailers need to create new internet grocery models that will appeal to consumers' socio-cultural as well as technology-mediated experiences: not just now but 5-10 years into the future. Essentially, consumers are challenging internet retailers' corporate agenda from outside the firm. Fourth, fragmentation and multitasking are found to be positive defense mechanisms

against the overall level of provision and services offline. Those smaller internet retailers who are more flexible in their global sourcing system may be willing to link up - following the Amazon model - to collectively source premium and specialty goods (particularly relevant for non-price sensitive shoppers). The post-sub-prime low growth economy provides an incentive to exploit rising home food consumption, in-home catering and in-home entertainment. Meanwhile, probably exacerbated by food scares, very low cost 'basic' food items may appeal to fewer shoppers than is usually assumed. Lastly, our findings show that competition and collaboration will need to be addressed: even in the very competition-intense grocery industry. Cooperation will likely not, as in the past, take place far away from the consumer (e.g. in logistics), but may even be led by consumers through their fragmentation and multitasking activities. It could be that demand led internet/social media activities drive these new, value-based, strategies and in turn become a new source of management innovation for the grocery industry.

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