LUND UNIVERSITY – SCHOOL OF ECONOMICS AND MANAGEMENT

Insights on Future Consumer Behavior

- A study of what influences the Danish consumers when choosing food distribution channels in 2020

Master's Thesis in Globalization, Brands and Consumption
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May 2012
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Title:	**Insights on Future Consumer Behaviour -** **A study of what influences the Danish consumers when choosing food distribution channels in 2020.**
Date of the Seminar:	29-05-2012
Course:	BUSN29. Master thesis
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Keywords:	Trends, consumers, retailing, channel attributes, future
Thesis purpose:	The thesis aims to explore what influences the Danish consumers when choosing food distribution channels in 2020 and further to test if current theories of consumers' channel choice can be applied in the year of 2020.
Methodology:	The thesis takes on a qualitative approach with mathematical principles. The thesis employs the Delphi Method as the primary method to collect data. To conduct the empirical analysis a desk research is carried out together with a Cross-Impact analysis and a Certainty/Impact analysis. Lastly, a vivid scenario is developed.
Theoretical perspective:	The theoretical perspective is based upon Behavioural Decision Theory. The thesis takes its departure within consumers' choice of distribution channels with emphasis on the channel attributes consumers evaluate in the antecedent state of the decision process.
Empirical data:	The empirical data consists of two rounds of semi-structured e-mail interviews. 10 experts within the field of consumer behaviour, retail management and future research participated. The empirical data collection aimed to identify trends that can influence consumers' future behaviour when choosing food distribution channels.
Conclusion:	Our findings suggest that four predominant trends will influence the Danish consumers' choice of food distribution channel in 2020; Automatization, Time and Convenience, A Healthy Life and Polarization of Price and Quality. The thesis further concludes that five out of seven channel attributes can be applicable in 2020.

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1.0 INTRODUCTION

This study revolves around what influences the Danish consumers when choosing food distribution channels in 2020, and is thereby a future study. The introduction will present why this study is conducted. More specifically, we will provide an introduction of the Danish consumers, present the theoretical perspective of the study followed by why this study becomes interesting to marketers. Eventually, the aim of the study is presented.

1.1 The Danish consumers

Danish consumers have long been characterized as price sensitive and as bargain hunters. Over the past decade this have provided the discount channels with larger market shares. While discount channels have penetrated, more niche channels have emerged, such as The Meat Market in Kødbyen in 2006 and Torvehallerne in 2011 in central Copenhagen. In this respect, we can see that consumers increasingly shop in both discount and niche channels and seem to have developed a differentiated purchase strategy. Additionally, the economic downturn in Denmark has brought about a shift in values for a large part of the Danish consumers (Økologisk Landsforening, 2012). Alternative ways of "shopping" have emerged such as urban gardeners and garbage hunters (skraldere.dk, 2012) that seek to make up for the overconsumption that was present before the economic downturn (Økologisk Landsforening, 2012). In this regard, a shift in the Danish consumers' values has occurred. Shifts in values can indicate that consumers change preferences (Økologisk Landsforening, 2012), which makes it interesting to investigate if consumers' preferences when choosing food distribution channels will change in the future. What can have an influence on the Danish consumer behavior in the future? In what way will Danish consumers' behavior change? Further, how can changes affect the way consumers' reason about a decision in relation to the choice of food distribution channels in the future? These questions are some of the interesting topics this study aims to investigate. Food distribution channels are in this study defined as a contact point or medium through which consumers buy food such as farmers, supermarkets, take-away places, convenience stores, Internet shops, or maybe completely new distribution channels.

1.2 Theoretical perspective

This study takes its theoretical point of departure within behavioral decision theory (BDT) (See: Simonsen et al. 2001:255). More specifically, the study will focus on theory about consumers' channel choice and consumers' preference of channel attributes (See: Balasubramanian, 1998, McCorke and Reardon, 2002, Hansen, 2006, Thompson and Yeong, 2005). A choice is defined as the decision consumers commit to when encountering several options from which one option must be selected. As this study examines consumers' choice of food distribution channels, theory within this particular field will be our main focus.

Consumers' choice of food distribution channels can be characterized as a habitual choice where consumers rely on alternative options from their consideration set (Johnson and Kujala, 1993:250). The consideration set is defined as those channels a consumer can recall from memory, which they consider in a choice situation (Askegaard et al. 2010:33). Further, consumers are influenced by situational factors and personal factors in the antecedent stage of a channel choice (Gehrt and Yan, 2004:6, Neslin et al. 2006: 96). The situational factors are external circumstances and personal factors are the consumers' personality, experience and preferences (Gehrt and Yan, 2004:6). Consumers' preference is based on their previous experiences and perceptions, and can be reflected in the channel attributes consumers desire (Nelin et al. 2006:96). An example of a channel attributes can be product assortment or price. Moreover, in the antecedent stage of a channel choice consumers evaluate the channel attributes and consider advantages and disadvantages between the channel alternatives and their criteria set (Gehrt and Yan, 2004:6). The channel with the most attractive bundle of attributes will be chosen (McCorke and Reardon, 2002: 181)

The channel attributes consumers evaluate have been in focus in many research papers (See: Stephenson, 1969, Bearden, 1977, Balasubramanian, 1998, McCorke and Reardon, 2002, Hansen, 2006). Previous research only examine the channel attributes at a given point in time and therefore lack considerations about how the channel attributes can be influenced by trends and developments in society over time (See: Stephenson, 1969, Bearden, 1977, Balasubramanian, 1998, McCorke and Reardon, 2002, Hansen, 2006). The aim of this study is to examine what influences the Danish consumers when choosing food distribution and further to test if current theories of consumers' channel choice can be applied in the year of 2020. Trends become a significant concept in this study. Trends can be explained as changes that occur in society. Trends are intangible, but are important in this study as they manifest in society and drive values. Some trends affect all parts of society for many years, whereas other trends only affect a minor part of the population and disappear quickly. Hence, a trend can be characterized as a temporal state that affects society in a given period of time (Jakobsen and Jakobsen, 2002: 25).

In the section about the Danish consumers it was explained that a shift in consumer values have occurred and that such a shift can indicate changes in consumers' preferences. If consumers' preferences change, it can indicate that current theory will not be applicable in a future context. Over the past years, technological changes have occurred and have radically altered the everyday life of the average consumer, which social media, blogs and other interactive media is an example of. What is interesting is how consumers' everyday communication has radically changed as a result of web 2.0. At the same time technology is developing at rapid speed and weak signals of upcoming trends are emerging. This makes us question if the changes we have observed in consumers values and preferences will be reflected in the channel attributes consumers prefer and evaluate when choosing food distribution channels in the future. Therefore, it becomes necessary to test previous theory. If existing theory cannot be applied in 2020 new theory must be developed.

1.3 Marketers – what is in the periphery?

According to Graver and Slater (1999: 1166) companies ought to create strategies to meet consumers' needs but also to interpret consumers' latent needs. They (Graver and Slater, 1999: 1166) argue that competitive advantage is only temporal and to gain competitive advantage in the long run companies must aim to predict consumers' needs as they develop over time. Day and Schoemaker (2006:ch.2) also stress the need for companies to develop their "peripheral vision". They propose that the peripheral vision can expose weak trends that can have a vast influence on consumers in the future. Moreover, they suggest that signals in the periphery can help companies gain competitive advantage because it provides the opportunity to build bridges with actors from other industries and co-create radically different solutions that meet the future latent needs of consumers. Therefore, marketers should monitor consumers and the shifting behavior in order to offer innovative solutions and be first movers.

In this regard, the study becomes interesting to marketers, especially for those engaged in strategic development of food distribution channels as the knowledge generated in this study may help anticipating changes in consumer behavior. Changes in the way consumers choose food distribution channels can indicate that retailers must (re)direct their business or change strategy and thereby investigate if they offer the channel attributes that meet consumers' preferences. Offering channel attributes that are significant for consumers when choosing channels is particularly important, as the attributes a channel offers are conclusive for consumers' final choice of channel. Ultimately, drawn from theory, the findings from this study may enable practitioners in the food industry to create future strategies that allow them to be first to market, gain consumer patronage and thereby competitive advantage.

1.4 Research Aim

Investigating the future is a central part of this study. The future is difficult to assess, as no one has the ability to predict beyond explicit and tacit knowledge and thus complete and accurate pictures of the future cannot be generated (Pillkan, 2008:174). However, studying the future becomes necessary in order to anticipate changes. As already mentioned, an understanding of the future can generate valuable insights for marketers that can direct their business and thereby gain competitive advantage. From a theoretical perspective, prospects of the future can indicate that current theory might not be applicable and new research must be initiated in order to understand these changes and revise theories. Despite that much research previously has tested the channel attributes that affect consumers' channel choice we believe it is necessary to test these in a future context in order to determine if theory is still valid in the year of 2020. Consequently, the study seeks to contribute with new insights within the field of consumers channel choice. As mentioned, a shift in the Danish consumers' behavior has occurred. This can indicate that consumers will change preferences when choosing food distribution channels, which is why it is relevant to examine these changes and preferences further. Thus, the aim of the study is to explore what influences the Danish consumers when choosing food distribution channels and further to test if current theories of consumers' channel choice can be applied in the year of 2020. More specifically, we will provide insights about the following:

a) Which trends will influence consumers' choice of food distribution channels in 2020?
b) How will predominant trends influence consumers' choice of food distribution channels in 2020?
c) Which channel attributes will be significant to consumers when choosing food distribution channels in 2020?

Throughout the study food distribution channels will be referred to as FDCs.

1.5 Structure

Ch. 2. Methodology and Research Design

- Chapter 2 highlights how the the research is designed. It is stressed what data is the needed to create knowledge about the aim and which data sources and data collection methods are applied. Further, empirical analysis methods, sampling methods, and how the data is collected are presented. Lastly, the trustworthiness and authenticity of the study are evaluated.

Ch. 3. Literature Review

- Chapter 3 presents an overview of the theory within the research field of consumers' channel choice and attributes. The chapter is presented in a historical order and illustrates the theoretical development. Lastly, the chapter presents a theoretical framework ,which will be applied in the discussion (ch. 5) when testing theory.

Ch. 4. Empirical Analysis

- Chapter 4 seeks to evaluate which trends predominantly influence consumers' choice of FDCs in 2020. Eventually, the emprical analysis will provide af vivid scenario of how predominant trends influence consumers' choice of FDCs.

Ch. 5. Discussion

- Chapter 5 in channel attributes derived from the theoretical framework are examined along with the emperical data.

Ch. 6. Conclusion

- Chapter 6 concludes on the findings from the empirical analysis and the discussion

2.0 METHODOLOGY AND RESEARCH DESIGN

This chapter highlights how the research is designed and what methods we apply in order to conduct the study. Introductory, the chapter states why we have decided to focus on families of the upper-middle class in Denmark, the reason for studying the year of 2020, and why studying the future is complex. Secondly, we emphasize why data on future trends is significant in order to understand and create knowledge about the future and in this regard which data sources and what data collection method we apply. Thirdly, we argue for which empirical analysis methods are imperative in order to create a credible picture of the future. Hereafter, we present the sampling method, how the data was collected and how we analyzed it. Lastly, the chapter rounds off by evaluating the trustworthiness and authenticity of the study.

2.1 Segment in focus

In order to conduct a study that yields the most accurate reflection of the future it has been decided to take a number of limitations into account that can help to control other influencing factors. Today, it is fully accepted by most researchers that while trends have a major influence on consumer behavior so does the cultural background, upbringing, and social class (McGoldrick, 2002: 39)(Mennell et al. 1992: 55) (Askegaard et al. 2010: 10-13).

Firstly, this study is limited to the country of Denmark and Danish citizens due to fact that cultural norms, values and moral are reflected in consumer actions. Thus, people with different cultural origin might have diverse reactions to the same stimuli. As this study aim to understand how specific trends affect consumer behavior it becomes necessary to limit the study to consumers with the same cultural origin in order to expose how strong the relationship is between the trend and consumer behavior. Especially, Denmark becomes interesting to us as researchers because we ourselves are Danish and therefore already posses knowledge about the Danish market. This we believe can be an advantage as we have a basic knowledge of the Danish market and FDCs.

Secondly, as mentioned, the social class consumers belong to affect their shopping patterns, spending power and shopping motives (Jakobsen and Jakobsen, 2002), hence these factors have an impact on the choice of distribution channels (Askegaard et al., 2010: 313) (McGoldrick, 2002: 87). This is important in relation to this study because it means that the choice of FDCs can vary across the social classes. Therefore, we believe it is necessary to further limit the study to a specific social class. The social classes identified in Denmark are the under-class, under-middle class, middle class, upper-middle class and the upper class (ae.dk, 2009). In this study the focus is the upper-middle class. This class is chosen due to the fact that the upper-middle class consists of a large part (30%) of the Danish population and has a relative high spending power with yearly income of 230.000-400.000DKK before tax, which is why we believe this class is of high interest to the food industry.

Thirdly, the consumer segment has been further limited to an age group consisting of men and women between 20 – 40 years old in 2020 (Today 12 – 32 years old). This limitation is chosen due to a number of reasons. First of all, Askegaard et al. (2010: 437) argue that people within the same age groups tend "to share a set of values and common cultural experience that they carry throughout life" (2010: 437). When brought up in the same time, this age group shares "cultural-time-specific" characteristics. This segment could also be assumed to possess an educational degree and thereby be part of the labor market, and have a solid spending power. Additionally, the segment is still young and thus has the ability to change and develop new shopping patterns.

This study focus on families with 2 children as they typically have a larger and more consistent consumption of food compared to single or couples only households. More specifically, household groups consisting of families have the highest consumption on an annual basis (Dst.dk, 2011). Hence, families of the upper-middle class in the Danish society can be of high interest to marketers.

2.2 Year in focus

As the research question state the year of attention is 2020. Lindgren and Bandhold (2009: 24) claim that if we look 1 year ahead not many new possible futures are likely. In contrast, if we look many years ahead (e.g. 20 years) the number of possible futures and alternatives are much greater, and the future becomes much more complex. As we explain later in this chapter we aim to obtain as realistic and certain picture of the future as possible. Hence, if we choose to look many years ahead the future becomes very uncertain and thus not valid. On the other hand, if we only look a few years ahead not much can change, and it then becomes less relevant to study the future. Therefore, we chose the year of 2020. This allows new and interesting changes to occur, but is a timeframe close enough to generate realistic implications of the future.

2.3 Theoretical perspective

The main motivations for this field of research emerged as we observed some tendencies indicating that consumers have begun to purchase food differently. In Denmark tendencies such as urban farming and local trends have become popular. The supply of discount channels has increased while niche channels are still popular, which are contradicting tendencies that becomes interesting to investigate.

Another interesting development is that technology has changed consumers' daily routines, and consumers increasingly enjoy online shopping. These changes encouraged us to study if Danish consumers' reasoning about where to shop for food is the same in 2020 as it is today.

With this focus it is natural to take the theoretical point of departure in Behavioral Decision Theory. More specifically, consumers' choice of channels with emphasis on the channel attributes consumers evaluate in the antecedent state of the decision process. For this reason, we aim to take departure in existing theories in order to see if these can be applied according to the Danish consumers' behavior in 2020. This becomes interesting, not only to researchers where the consequence of new findings would accelerate more research and new theories. It also becomes interesting to marketers, as they can employ the insights we generate in their future strategies. The theoretical focus in this study is therefore consumers' choice of channels and the channel attributes. This will be investigated in more detail later in the literature review and theoretical framework (chapter 3).

2.4 The complexity of studying the future

Due to the aim of the study, we need sources of data and data collection methods that enable us to generate pictures of the future in a consistent and systematic way. Studying the future is complex as no one can give a complete answer to how it will develop and what will occur. Although absolute pictures of the future cannot be generated it is still of high interest both to researchers and practitioners. Due to changes in the environment, prospects of the future can indicate that current theories may not be applicable, and adapting existing theories may be necessary. Additionally, prospects of the future can lay the foundation for strategic planning, innovation and product development. Hence, trying to come as close to realistic suggestions on the future as possible becomes relevant. In this regard, validity becomes a central concept in the study. Studying the future is fragile, and sources of data and data collection methods should be diligently selected. This is one of the main concerns and differences in comparison to study contemporary issues, as sources of data and data collection methods are decisive to create as valid implications as possible. For that reason, we assess that the sources of data must be selected to anticipate these difficulties.

2.5 The significance of trends

According to Jakobsen and Jakobsen (2002) trends are central to understand and create knowledge about the future. They argue that because trends are dynamic they constantly create a new state and contribute to changes in the environment. Thus, anticipate changes in the future entails an understanding the past, which facilitates understanding the present. Additionally, as trends cause changes they can affect and drive future consumer behavior. (Ibid). Therefore, trends become important to understand and identify as they can lay foundation for how consumers choose FDCs and which channel attributes that are significant for the segment. In this respect, in order to fulfill the aim of the study knowledge about future trends is imperative data to possess, and hence they become the type of data we require in this study. In order to obtain knowledge about future trends and how these can affect families in the upper-middle class' everyday life more data sources can be considered, which will be discussed and agued for in the very next section.

2.6 Sources of data

In this section we discuss which sources to consider when requiring data on future consumer behavior and trends; more specifically which future trends that can predominantly influence the segment's choice of FDCs. We shortly describe them, discuss advantages and disadvantages of the sources, and conclude which sources we find relevant to enlighten the aim of the study.

When studying consumer behavior and consumers' choice in general it is common to obtain data i.e. by interviewing consumers qualitatively or quantitatively, observing them or conduct consumer experiments (Bryman and Bell, 2011). However, when studying the future consumers as a source of data may not be appropriate. Henry Ford once said, "*If I had asked people what they wanted, they would have said faster horses.*" (Quote: Henry Ford); in other words, if we ask consumers what they want their answer will be better products and services. Consumers only know what they have experienced, and do not have the ability to imagine new technologies or products as they do not know about these (Ulwick, 2002).

Experts are individuals that possess a high degree of specialized knowledge and skills within a particular field or subject (Popper, 2008), which ordinary people do not hold. Due to experts' profound understanding and knowledge within a certain field, which they have been engaged in for a longer period of time, they have a better ability to describe both the past, the present, and the future than ordinary people, as well as the ability to uncover trends that can change and arise in the future and affect consumers.

Additionally, data on consumer behavior and trends can be obtained from documents, such as mass media outputs, research company reports, and official documents and data. These documents are not produced at the request of us as researchers; hence documents are sources of secondary data. For this reason, because the documents have not been produced specifically for the purpose of business research, one must carefully consider the validity of the documents. (Bryman and Bell, 2011: 544). Still, these sources of data can enlighten past and present prospects of consumer behavior and trends that are relevant for the aim of the study (Popper, 2008).

Thereby, we consider three sources of data; consumers, experts and documents. Due to consumers' inability to imagine the future they do not hold the expertise to provide a valid picture of the future, and hence we do not find that consumers are able to supply with the required data. Conversely, experts' knowledge in a particular area, their profound understanding of the past, present and the future, and their capability of identifying future trends is valuable when aiming to obtain data on future trends and an understanding of consumers' choice. Hence, we assess that experts are an important source of data to shed light on the research aim. When considering the significance of identifying future trends we do not consider documents to be appropriate data sources if used exclusively. Prominently, this assessment is made as documents primarily represent past and present perspectives. Additionally, searching for relevant documents by ourselves would entail an invalid and biased way of creating pictures of the future. We would have to identify trends ourselves and to search in databases, Google or libraries by searching on different key words or phrases chosen by us, which could predetermine the findings and in turn decrease the trustworthiness. On the other hand, we believe this source of data can help to support and strengthen views of experts and information on trends they emphasize. Hence, documents are not appropriate to identify trends, but appropriate to build on trends that experts identify. In conclusion, we assess that the most appropriate sources of data are experts together with minor support from documents.

2.7 Data collection methods

In section 2.6 it was argued that the aim of the study calls for experts and documents as sources of data. The documents are collected through a desk research. However, this is argued in section 2.8.1 of the empirical data analysis methods as this source of data is merely used in order to support data obtained from experts.

In order to select data in a consistent, systematic and trustworthy way more methods are identified that can employ experts as sources of data: Structured questionnaires, semi-structured interviews, unstructured interviews. However, not all methods seem appropriate to fulfill the aim of the study.

Wikström (1975: 53) describes that a structured data collection method, where the researcher clearly specify which trends the experts must take into consideration can have a negative effect, as the study can be affected by the researchers own preconditions. Moreover, this we believe can decrease the trustworthiness of the data as we as researchers cannot take on the expert role of identifying trends. This can result in the fact that we might miss important information and identifications. Instead, we need knowledge from eligible people, namely the experts, to identify trends that can predominantly influence our segment, which cannot be obtained i.e. by letting experts answer a structured questionnaire with closed questions. In this regard, we evaluate that a less structured method is appropriate as we wish to uncover information unknown to us and obtain a deeper knowledge about the relationships between trends, families of upper-middle class, and how they choose FDCs.

According to Bryman and Bell (2002: 467) unstructured method is often applied when investigation begins with a general notion of a topic. Fellman argues that unstructured methods enable researchers to "*unveil crucial data that they wouldn't otherwise receive*" (21), where we as researchers would merely structure an expert interview or expert focus group interview around few key words or a subject. Hence, if we choose to gain knowledge from experts by conducting unstructured interviews or focus group interviews it allow us to receive rich data (Bryman and Bell, 2011: 472). However, as we do have a clear focus and aim in our research, and particular subjects that we wish to receive data on, we do not believe that an unstructured method is appropriate.

Alternatively, by letting the experts explain their own beliefs in a semi-structured way we avoid our own preconditions, while still uphold a control of which way the interview unfolds. This is vital in order to accomplish the specific aim in focus, which can enhance the trustworthiness of the study. Particularly, this becomes relevant as we wish to uncover knowledge about the most predominant trends towards 2020. More specifically, a semi-structured method allow us to structure interviews in a way that makes the experts able to indicate which trends they perceive will have the highest impact in 2020. Hence we need a semi-structured method that allows mathematical principles. In this respect, a few semi-structured methods are identified; e-mail interviews, telephone interviews, personal interviews and Delphi inspired interviews:

The employment of semi-structured e-mail interviews have the advantage of being flexible, as we do not need to arrange meetings with experts, which allow the experts to answer the interview when it is suitable for them. Additionally, we believe this increase the number of experts accepting to participate in the interviews. Both semi-structured telephone and personal interviews have the disadvantage of being inflexible for the experts as we would have to arrange scheduled meetings. On the other hand, these two methods can be favorable as we have the opportunity to ask the experts to deepen their answers and views. In this regard, it must be considered that the personal contact either by phone or in person can entail a negative effect because the experts may be distressed about answering questions that they perceive as sensitive, which can result in that the experts detain important information. Secondly, when conducting telephone interviews it is easier for the expert to terminate a telephone interview than an interview conducted in person. (Bryman and Bell, 2011: ch. 18).

The Delphi method anticipates several of the disadvantages above. But first it is important to highlight that this method can be applied both structured and semi-structured. Originally, the purpose of the Delphi method was also to obtain a quantitative future assessment (Hasson and Keeney, 2011: 1696) by conducting *structured* interviews with experts (Lindgren and Bandhold, 2009: 64.). However, this view has changed dramatically (Keeney and Hasson, 2011:1697) and today many different approaches and ways of applying the method exist (Duffield et al., 1997: 117. Linde and Duin, 2011. Loo, 2002. Okoli and Pawlowski, 2004. Goodman, 1987). In recent literature the objective of the Delphi method is not only to obtain *measurable* views and answers from the experts. The aim is also to acquire qualitative views and arguments from experts (Linde and Duin, 2002: 1563) that cannot necessarily be measured, hence semi-structured interviews can be applied.

The Delphi method consists of interviewing a panel of experts by post or mail, where more rounds of interviews are conducted until consensus between the experts' views and arguments is achieved (Loo, 2002: 766). In this way we receive rich and precise data on future trends, while it (by applying mathematical principles) allow us to sort out the trends that predominantly can influence consumers' choice of FDCs. By applying the Delphi method we avoid the pitfalls of being inflexible towards the experts and thereby may be able to obtain a larger expert panel. Secondly, as the Delphi method does not entail personal contact the possibility to receive reliable answers may be more likely. In contrast, as the Delphi method entails written interviews we do not have the opportunity to ask detailed questions if their answers are unclear or if some of the identifications and views need elaboration. However, we believe the advantages of the Delphi outweigh the disadvantages. Therefore, we choose to apply the Delphi method as the predominant method to collect data from experts. In the next section (2.7.1) we clarify further characteristics of the Delphi method, why these characteristics are important to fulfill the aim and how we apply the method.

The reasoning behind choosing a semi-structured method to create knowledge calls for a qualitative research method with mathematical principles throughout the study. We need rich data where the experts have the opportunity to answer freely with deep descriptions, but also data that highlights how influential the trends are, and if they can be assumed to be certain in 2020. That is, some quantitative elements are required to quantify subjectivity and viewpoints of the experts, as we wish to gain knowledge on which are the most predominant trends that can influence consumers' choice of FDCs. This calls for mathematical principles that enable experts to rank the trends they identify.

We acknowledge the fact that it is difficult to generalize qualitative research; however the aim of the study is not to conclude general findings about consumers' choices, but to understand the underlying tensions of their choices, namely the influencers, and if current theory of consumer channel choice can be applied in the future. We also recognize that qualitative research tends to be more biased than quantitative data, and that it can lack in transparency. Nevertheless, this we aim to avoid by explicitly explain the logic of what we do and what choices we have made during the process of conducting the thesis, why we made these choices, and not least to clarify how we analyze our data.

As explained above further characteristics of the Delphi method are clarified in section below. Additionally, we will also clarify why trends are important to enlighten future perspectives in section 2.7.2.

2.7.1 The Delphi method

The Delphi method was developed in the 1950s by the mathematician Olaf Helmer at Rand Corporation in California (Linstone and Turoff, 2010: 1712). The method's name originates from the Greek god Apollo Pythios, who was a master of Delphi and renowned for his ability to forecast the future (Goodman 1987: 729). The value of the Delphi method is *"its ability to forecast the possible occurrence of events in the future*" (Baldwin, 1982: 319), and its capability to generate new information in a systematic way (Wikström, 1973: 50). Moreover, due to its systematic nature it can take into account many complex factors at one time (Ibid), which becomes central when collecting comprehensive data. The characteristics of the Delphi method are pertinent to the aim of the study. These characteristics, except the importance of using experts as a source of data (as argued in section 2.6), are described below. The expert criteria and selection for the study is elaborated in section 2.9.

Linstone and Turoff characterize Delphi as "*(…) a method for structuring a group communication process so that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem*" (1975: 3).The objective is to develop techniques to obtain the most dependable consensus between experts (Makridakis and Wheelwright, 1978: 498. Okoli and Pawlowski, 2004: 15. Linstone and Turoff, 1975: 7). More specifically, the Delphi method structures and facilitates the group communication over series of iterations, the so called Delphi rounds, until a group consensus of a future direction is achieved (Loo, 2002: 764). This means that consensus-building is applied in order to receive data on the most predominant trends that can influence consumers' choice of FDCs in 2020. The Delphi rounds are usually conducted through interviews composed of written letters, where the experts identify important breakthroughs or trends that may affect the outcome of the future. Usually between two and four rounds of interviews are conducted until consensus between the experts is gained. No more rounds should be conducted when consensus about the future direction is found (Loo, 2002: 766). In our study consensus is found in the first and second round, which is why we chose to conduct two rounds. This is elaborated in section 2.9.

As argued, the original aim of the Delphi method was to obtain consensus between experts (Loo, 2002: 764). Opponent to this view Linde and Duin (2010: 1562) argue that researchers should aim to seek for dissensus between the experts as it can result in many new notions about the future. Although this interpretation of the Delphi method may prove to identify new aspects of the future, our objective is to obtain consensus. This is due to the fact that we seek to uncover the most predominant trends towards 2020 and therefore need the most significant trends that can influence consumers in the future. Hence, high consensus indicates strength of the findings.

Another important aspect of the Delphi method is that the experts are anonymous towards each other when the data collection is taking place. This aspect increased the trustworthiness of the study as they do not need to account to other experts, who may hold a different view. In this way the experts are not directly influencing each other.

Thereby, the values of the Delphi method is its ability to structure group communication that allows experts and us as researchers to deal with a complex issue, which becomes pertinent in order study in order to collect relevant data in a systematic way.

As we will see later on in the Methodology and Research Design (section 2.10) chapter we only partly apply the Delphi method. When we collected the data some of the experts preferred to conduct the interviews by phone. Due to the reason that the Classic Delphi method consists of collecting data in written material, the telephone interviews result in the fact that the method is only partly employed. On the other hand, as we saw in the very last section, due to the many ways the Delphi method can be applied today, more researchers question what a genuine Delphi method entails (Hasson and Keeney, 2011). Nevertheless, according to the Classic Delphi method we only apply parts of the method.

2.7.2 Trends as means to enlighten future perspectives

As argued in section 2.5 this study requires knowledge on future trends in order to fulfill the aim of the study. In this regard, trends are also applied as means to anticipate the future. As mentioned trends are dynamic and constantly create a new state that in turn cause change in the environment. Hence, we seek to understand which trends can have an influence on future consumer behavior, which experts are to identify through the employment of the Delphi method.

Pilkahn (2008: 128) argues that once an understanding of a trend improves it becomes easier to predict how it will evolve in the future, which make the identification of future trends important. According to Pillkahn (2008:129) one way to examine trends it to understand what has coursed the trend to emerge. He further claims the emergence of a trend can be rooted in several courses and that these work as drivers for the trend. Hence, it is important to identify forces that work to reinforce the drivers and thereby carry the trend forward. Further Pillkahn (2008:129) claims that these forces and drivers contribute to the direction as well as the strength of the trends. These forces and drivers we identify by interviewing experts and applying the Delphi method. How this data is collected explained in section 2.10.

Another important consideration is countertrends (Pilkahn 2008: 129). When a trend emerges, countertrends often appear to oppose to the trend (e.g. Global vs. Glocal). If they are strong enough these countertrends can prevent the trend in evolving and may force the trend to change direction. Information about countertrends is important in this study as we apply the method of Scenario Analysis in the empirical analysis. A scenario is an imaginative vivid picture and description of how the future may turn out, which is explained in section 2.8. Hence, in a scenario it becomes important to consider how trends play out together as they can oppose or drive each other.

Trend levels

In order to identify which trends can influence consumers' choice of FDCs in 2020, and how these trends particularly affect consumers' choice, it is important to understand the different levels of trends. In the following we explain how we define the trends levels in this study.

According to Pillkahn (2008:127) a trend need to be examined by classifying the trend according to the strength of change it drives. He argues that the strength is important in order to determine what kind of impact the trend can have on society. This becomes particularly relevant to our study, when we identify and analyze trends because the strength of a trend can have strong impact on consumers' choice of food channels. In this relation Jakobsen and Jakobsen (2002:129-168) divide trends into subcategories. These subcategories explain the different levels of strength a trend can possess, more specifically, in terms what kind of change a trend can drive. They explain three categories, *Giga, Mega and Fashion trends* (2002:169).

In this study giga trends are those Lindgren and Bandhold (2002:129) consider as trends that brings with it a radical change which manifests in the daily routines and values of businesses, organizations and individuals of a society. In addition, giga trends often last for approximately 20 to 30 years, and become increasingly predominant in society over time (Jakobsen and Jakobsen, 2002: 129-168). Because of the high impact giga trends have on society and consumers, giga trends become vital to identify in this study.

Mega trends are not as influential as giga trends and are only evaluated to last around 2-8 years (Jakobsen and Jakobsen, 2002: 157). Mega trends can also have a large influence on how businesses and individuals in a society acts, but is more prevalent within specific markets, consumer groups or subcultures and does not affect society as a whole (Jakobsen and Jakobsen, 2002: 157). Hence, mega trends are smaller in terms of the strength it brings with it as compared to giga trends. Therefore it is relevant to investigate which mega trends particularly influence our specific consumer group – families of the Danish upper-middle class.

Fashion trends (also referred to as fads) usually dictate fashion (e.g. colors and shapes of clothes or fashionable accessories). Fashion trends spread fast and widely between countries and individuals. However, the strength of fashion trends are considered fairly shallow as these only have an impact from a few month to two years and do not involve any significant change in society (Jakobsen and Jakobsen, 2002: 162). As fashion trends only have a short term impact we chose not to consider these in our study.

Pillkahn (2008: 124) explains the different areas a trend may affect and he divides trends according to the macro and the microenvironment they affect. The macro trends are *Societal, Technological, Economic, Ecology, Political and Value trends* (2008:125). This way of looking at trends resembles the PEST model

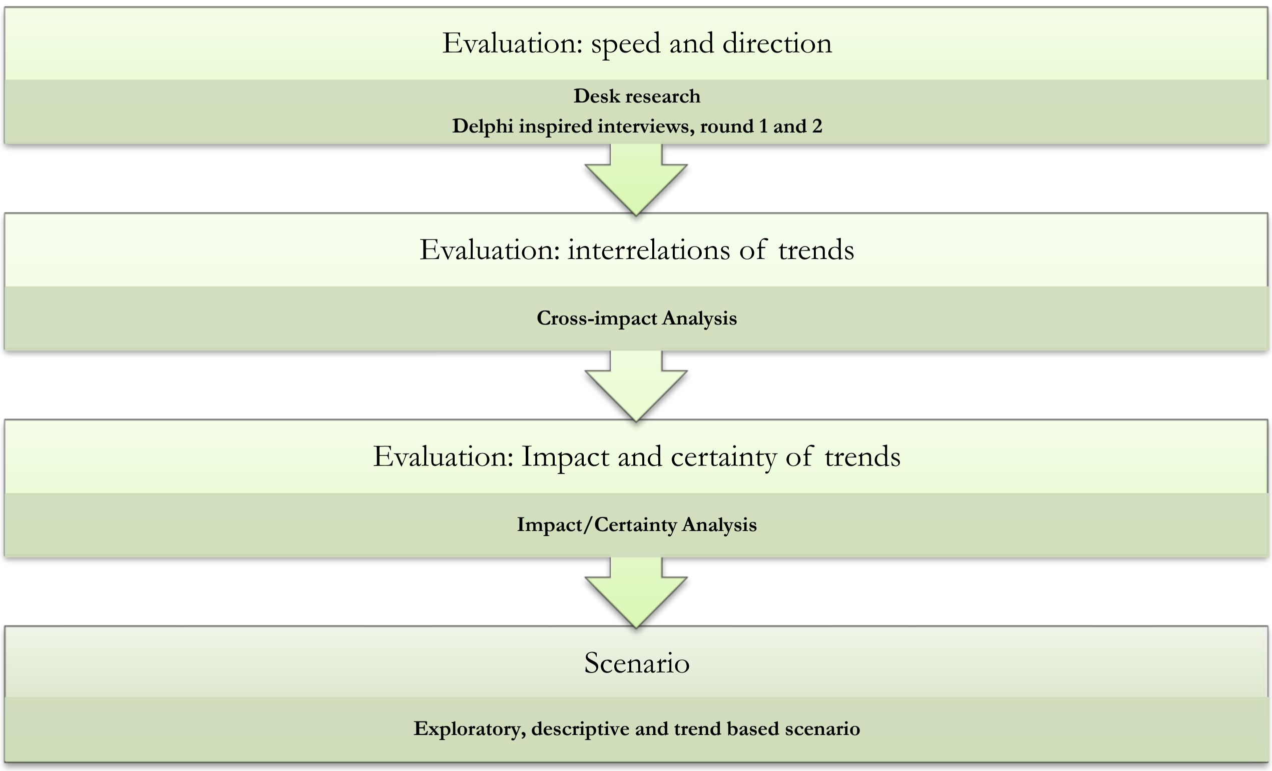
(Jobber, 2009) in many ways that seek to uncover opportunities or threats. Pillkahn (2008: 127) defines the micro trends as *market trends, consumer trends, product trends, supplier trends,* and *competition trends* that more or less resemble the model of Porters' five forces.

In sum, the classifications of trends can be many, but it is a matter of small variation in the differences. When studying the future the strength of change a trend can drive and what areas of society it will affect must be understood. In this study we track and follow those trends Jakobsen and Jakobsen (2002:129) refer to as giga and mega trends as we wish to uncover trends that have a strong effect on all levels of society, while at the same time uncover which trends influence our specific consumer segment. We believe that these two levels of trends, due to their strength, can have the power to change consumer behavior. Applying trends with a lower level of strength would not be able to change consumer behavior in long term and are therefore not chosen as a proper object of study.

2.8 Empirical data analysis methods

In order to conduct the discussion (chapter 5), where we discuss which channel attributes will be significant to the segment 2020, it becomes necessary to conduct an analysis of the data (trend identifications) obtained from the Delphi inspired interviews. This we do by evaluating the speed and direction of the trends, how these are interrelated, how high impact they can have on our segment, and furthermore how certain the trends can be appraised to be. In the end, these analyses and evaluations will be applied in a future scenario of how the trends affect the segment's everyday life and their choice of FDCs. In order to create this knowledge we apply a set of data analysis methods that enable us to create a realistic scenario, which in turn will lay ground for the discussion. The figure below (figure 2.1) supplies an overview of which analysis methods we apply in each section of the empirical analysis. Why and how we apply these methods are explained and argued in the following subsections.

Figure 2.1, Empirical analysis methods



Source: Thesis illustration

2.8.1 Desk research

A desk research is conducted in order to obtain a deeper understanding of the identified giga trends, and to increase the trustworthiness as well as our ability to evaluate velocity (the speed and direction of the trends). Moreover, to evaluate how the trends will influence families of the upper-middle class in

2020 we assess that there is a need to shed light on specific aspects in the development of the trends, which is why a desk research becomes important. The desk research consisted of media scanning, Internet search, consultancy reports, government reports and statistical data, and periodicals. These sources become valuable for several reasons:

We assess that additional data from reliable sources can support the arguments of why some trends are related to others, which is important to create knowledge about in order to evaluate how the trends will influence the segment. Furthermore, the desk research also complements and support the experts' descriptions of the trends. Even though we received comprehensive data from the experts (as we will see later in thesis), we agree with Robson (2011: 158) that a combination of more methods (triangulation of data) can increase the trustworthiness of the study. Additionally, by applying reports and online articles this also gives us a chance to get statements form experts that did not have time to participate in our interviews. Hence, examine trends from more perspectives becomes relevant.

2.8.2 Cross-impact analysis matrix

Linstone and Turoff (1975) highlight that one common difficulty of the Delphi method "*is to get at the underlying relationships among possible future events*" (325). In other words, the Delphi method does not consider if a trend is interrelated and have an effect on other events or trends (Bañuls and Turoff, 2011: 1580). The cross-impact analysis is specifically developed to address this limitation of the Delphi method and is one of the most commonly used methods to help generating scenarios (Ibid). The cross-impact analysis aims to "*probe the effect of interactions among elements of a system*" (Linstone and Turoff, 1975: 325), which highlights the importance of identifying the most influential and independent trends to apply in the following scenario. Especially, interrelations are vital for the scenario analysis (which is applied after the cross-impact analysis) because interrelated trends will follow each others' development (Lindgren and Bandhold, 2009: 172). Consequently, if interrelations were not evaluated it will affect the trustworthiness and the findings in the study, as incorrect evaluations could be executed if we oversee that some trends are interrelated. Therefore, we chose to apply a simple cross-impact analysis to anticipate this limitation of the Delphi method.

We define a simple cross-impact analysis as a qualitative analysis where we apply mathematical principles, and not statistical calculations. The cross-impact analysis often entails statistical estimations, but since the data we received from the experts mainly are qualitative, it is not possible to conduct the analysis with statistical estimations. In order to conduct the cross-impact analysis we use the information and findings from chapter 4 (Evaluation: speed and direction of trends), and therefore the cross-impact analysis is based on data from the desk research and the data from both rounds of the Delphi inspired interviews.

2.8.3 Impact matrix

The impact matrix is a qualitative method with mathematical principles to prioritize the impact of a trend (Lindgren and Bandhol, 2009: 62). In order to fulfill the aim this method becomes important as we must consider the trends with the highest impact and certainty. By using the impact matrix we sort out the trends that can have a low impact on and low predictability of the segment's future choices.

Literature implies that the most common approach is to look for trends or factors that are uncertain instead of certain (Wack, 1985. Wack and Duncan, 1993. Mercer, 1995. Enzmann et al., 2011). The most appropriate approach depends of the focal question. In a case study it may be relevant to look for uncertainty as companies can have a need for handle uncertainties. However, in this study we aim to investigate which trends can influence consumers' choice that consecutively drive which channel attributes that the consumers base their choices on. Hence, if the way consumers choose FDCs today is not the same in the future it is important to create as realistic pictures of the future as possible. Moreover, the fact that we consider certain trends allow us to involve more trends in one scenario; that is, if trends in a scenario are interrelated and uncertain it is difficult to assess how the trends unfold. Therefore, it would be complicated to create a valid scenario.

To evaluate the certainty of the trends we apply the evaluations and findings from the first section of the empirical analysis, namely the evaluation of speed and direction of trends. Hence, again the Delphi inspired interviews become vital for the outcome of the thesis, supported by the desk research.

2.8.4 Scenario analysis and typology

In prolongation of the Delphi method, the cross-impact analysis, and impact matrix analysis we create a future scenario. The scenario will be based the most certain trends and the trends with the highest impact, which are derived from the impact analysis. Furthermore, it is based on the empirical analysis, which enables us to create a holistic and consistent scenario of the future. In other words, the scenario provides a future picture of how the identified trends influence families of the upper-middle class when choosing FDCs, which in turn can influence which channel attributes that are significant to the segment in 2020. Therefore, the aim of the scenario is to create a future picture of the segment that enable us to analyze if the channels attributes that are significant to them are the same in 2020 as they are today.

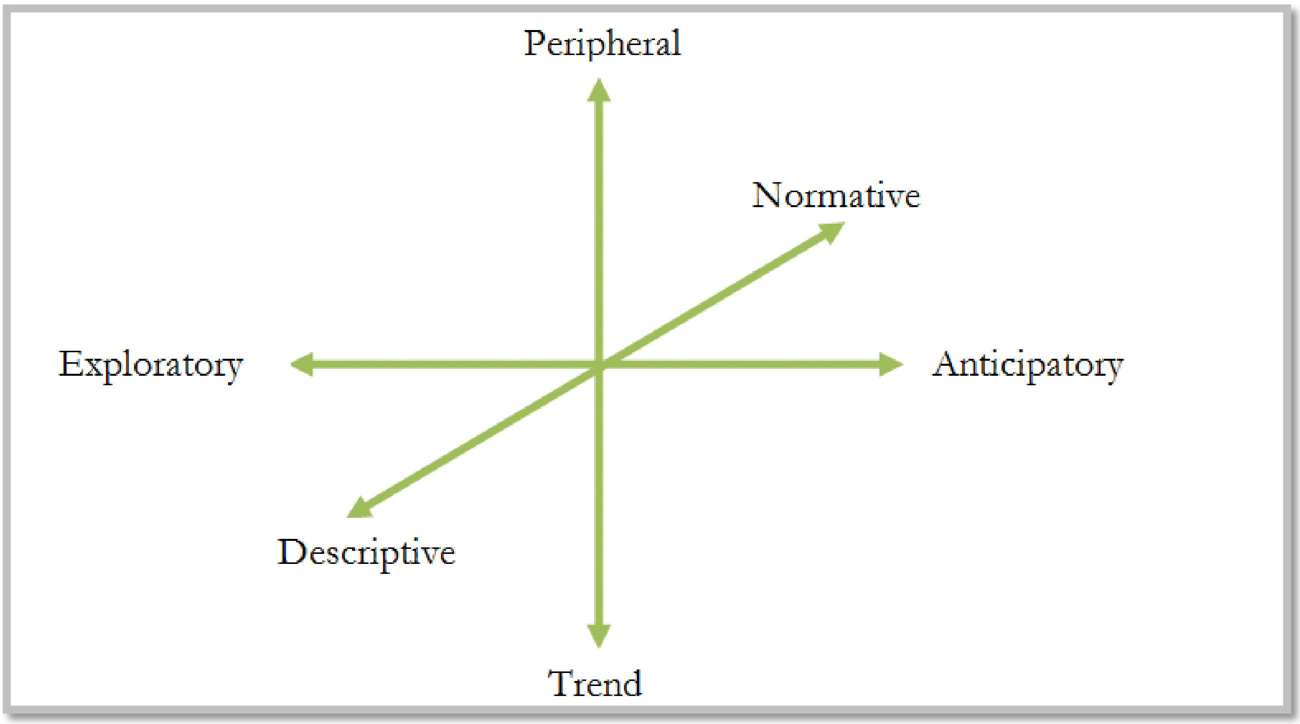
Scenario analysis is rooted in futurism, future studies and strategy (Lindgren and Bandhold, 2009: 35). The method is used by more researchers in continuation of the Delphi method (Epstein, 1998: 50. Bañuls and Turoff, 2011: 1980. Popper, 2008: 66). Scenario planning is a qualitative method, which is characterized by being "*a disciplined method for imagine possible futures in which organizational decisions may be played out*" (Paul Schoemaker in: Lindgren and Bandhold, 2009: 22) and "*a tool [for] ordering one's perceptions about alternative future environments in which one's decision might be played out right*" (Peter Schwartz in: Lindgren and Bandhold, 2009: 22).

The above mentioned characteristics of scenario planning make it a strong method to create scenarios of how the identified trends influence the segment's everyday life and how they can influence their choice of FDCs. A strong and consistent scenario allows us to reduce risk and uncertainty of the future (Lindgren and Bandhold, 2009: 24). Not only can the findings of the scenario analysis and the information we provide be an effective tool for strategic commercial planning in the food industry (Ibid), the knowledge that we aim to generate about consumers' choices in the future can also be a valuable contribution to theory.

Despite the fact that the scenario planning is praised by many researchers and practitioners and is a commonly used method to create possible scenarios of the future the method is also criticized. Coates (2000: 118) argues that the method is a simplification of the future and some people find scenario planning childish. This was taken into consideration when we selected the method. However, the fact that the method provides the opportunity to analyze on in-depth scenario of the future rather than analyzing many trends superficially is more valuable than this limitation of scenario planning. We argue that building future scenarios will always be a simplification of a complex reality – this is how one can reduce complexity into manageable information.

There are many ways of constructing scenarios and it must match the purpose of study (Bunn and Salo, 1992: 292). According to Ducot and Lubben (1980) a scenario constitutes of three dimensions, which are shown in the figure below. The dimensions we apply are argued for in the next three sub-sections.

Figure 2.2, Three scenario approaches



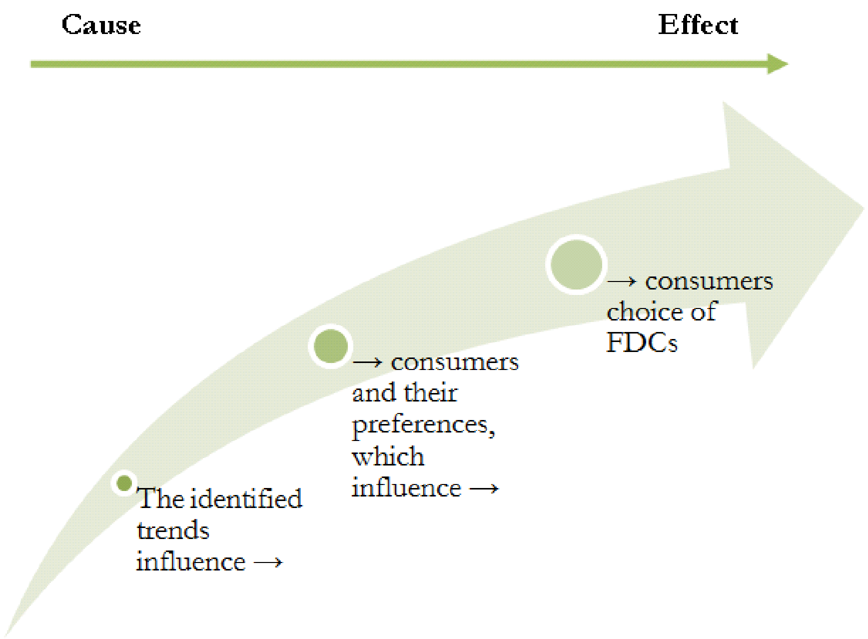
Source: C. Ducot and G. J. Lubben, 1980, "A Typology for Scenarios", Futures

Exploratory versus anticipatory scenario

Ducot and Lubben (1980) distinguish between explorative and anticipatory scenarios: In an explorative scenario the starting point is the present. Based on causes in the present, these causes will be unfolded in the future, which corresponds to the cause-effect relationship. In an anticipatory scenario, a scenario is constructed "*by searching for possible causes which could have lead to a given future state*"(Ducot and Lubben, 1980: 53), hence anticipatory scenarios emphasize goals and seek explanations rather than consequences.

Since the data collection method is exploratory, it is natural to apply an exploratory scenario. In an explorative scenario one evaluates the causes, which in this study are the trends the experts identified that in turn results in effects. In other words, the trends influence how consumers choose FDCs, which in turn affect which channel attributes are significant for the segment. The process can be seen in the figure below.

Figure 2.3, Visualization of the process in an exploratory scenario



Source: Thesis illustration, own contribution

Descriptive versus normative scenarios

Ducot and Lubben (1980) make a distinction between descriptive and normative scenarios. Normative scenarios can be preferred by planners or decision makers "*because it can help them to avoid the unconscious neglect of unlikely or undesirable possible*" (1980: 52). However, due to the exploratory nature data collection method with no empirical hypothesis to approve or company objective to answer to, the scenario occupies a descriptive stance. We thereby seek to state possible occurrences of which trends can influence consumers' choice of FDCs that also help us to understand which channel attributes consumers base their choices on. This we do by applying the evaluations made throughout the empirical analysis, and create an imaginative descriptive scenario based on these.

Trend versus peripheral scenarios

The difference between trend and peripheral scenarios is that while trend scenarios "*extend existing patterns into the future*" (Bunn and Salo, 1992: 293) and include few unexpected elements the peripheral scenarios in contrast "*assign extreme values to the variables and portray more startling developments*" (Ibid). In section 2.8.3 it is stated that we wish to a create scenario based on certainty as a consequence of the aim if the study. Moreover, the data collection consists of identification of trends, which we assessed is important knowledge in order to gain knowledge on the future. Therefore, the scenario is based on the identified trends and the evaluations we make in the empirical analysis. This must in turn enable us to conduct the discussion (chapter 5). Hence, peripheral scenarios are not applicable in the study, if they must be consistent with the aim, the data and the rest of the methods employed in the study.

To sum up, we apply an exploratory, descriptive and trend based scenario.

2.9 Sampling method and expert selection criteria

The aim of the data collection was to obtain rich relevant data and select the right experts for the Delphi interviews. When collecting data the experts were asked to identify trends they believe can affect consumers' choice of FDCs in 2020. For that reason, the selection criteria and our definition of an expert are people having a deep knowledge about consumer behavior, consumption, and/or retailing from a sociological or marketing perspective – all in and about the Danish market and society. Possessing a high degree of knowledge about consumer behavior and consumption is pertinent to understand what can influence consumers' choice and reasoning when choosing distribution channels. Moreover, an expert's knowledge about retail management is important to understand the various channels of where to buy food and how consumers choose among the different channels. In addition, it was important that the experts had the ability to gaze well into the future. The key points of the expert selection criteria can be seen in the figure 2.4 below and will be elaborated further in this section. Why each of the 10 experts was chosen to participate in our interviews can be read in Appendix 1.

Figure 2.4, Expert Criteria

2.9.1 Practitioners – has a solid working experience	**2.9.2 University professor – Either possesses a PhD or is in the process of undertaking such degree and is employed at a university.**	**2.9.3 Commercial Consultant – has a solid working experience within the field**
- Employed in retail companies, working with consumer behavior and/or trends - Works with consumer behavior with manufacturing of consumer foods.	- Marketing – focus on consumption and behavior - Sociology - focus on consumption and behavior	- Retail Management – focus on consumer behavior - Consumer trends - Future studies – focus on consumer behavior

Source: Thesis illustration

As figure 2.4 indicates, we included experts with different backgrounds. Not all experts could be expected to have in-depth knowledge about *all* areas relevant to the problem area but it was required they possess strong insights in at least one of the areas highlighted above. The sample as a whole was required to represent knowledge from every area emphasized in the figure. In particular, Makridakis and Wheelwright (1978: 500) highlight that this is important in order to have a sample of experts that can reveal insights on all relevant areas of the future. Hence, their main competencies should not be too alike as this could result in narrow-minded and less trustworthy future scenarios. Four experts represent two institutes. Nevertheless, the experts argued differently for the trends they identified, which illustrated that experts within one organization do not necessarily possess the same views, and it did therefore not decrease our quest in relevant insights in the study.

The experts participating possess a solid working experience within their fields, which was central as they have experienced trends in a professional and practical context and due to a longer working experience both hold past, present and future perspectives. It is important to have worked with trends in praxis as one perceives the world differently than ordinary citizens that have not worked with trends. All three perspectives of past, present and future are furthermore important in order to be able to understand the future as the future is affected by the past and its patterns (Day and Schoemaker, 2006: 33). Additionally, trends occur and develop over time, they can live and continue for more years and even decades (Jakobsen and Jakobsen, 2002: 130), which further emphasize that long work experience is pertinent.

When identifying experts it was evident that there do not exist many people in a small country like Denmark with the required expertise, which made it difficult to recruit experts to our Delphi inspired interviews. In total, 29 experts lived up to the selection criteria. We contacted all 29 experts, and 10 agreed to participate in the interviews. A full list of the 19 qualified experts that did not participate is available in Appendix 2. In this regard it was discussed whether to take in experts from other Scandinavian countries, however since consumers from these countries have very different behaviors (Ekström, 2010) the trends in 2020 can unfold diversely and influence consumers in dissimilar ways and thereby be unreliable. Yet, the diverse mix of experts in our sample cover all of the expert criteria stated in figure 2.4 which gives various, trustworthy and relevant assessments of trends that can influence consumers' choices of FDCs in the future. Even though the experts in our sample have very different backgrounds there was a high degree of consensus between the trends the experts identified. Consequently, we assume that these identifications would also be found in a larger sample group.

2.9.1 Practitioners

Practitioners employed in retail companies working particularly with consumer behavior was not identified. The largest retailers in Denmark, Dansk Supermarked and Coop Danmark, holding market shares of respectively 31% and 37% (Retail Institute Scandinavia: Aastrup et al., 2010: 197), were contacted but they explained that they did not have in-house consumer behavior and consumption experts. Instead, their knowledge was obtained through corporations with experienced consultancies. For this reason we assessed that the most qualified experts were to be found at universities, business schools, institutes and consultancies.

2.9.2 University professor

Five university professors were recruited to participate in the study. The recruited professors, as indicated in table 2.4 were required to lecture on and/or to be engaged in (or updated about) research in one or more of the following fields: Future trends, consumer behavior, food consumer behavior, consumer choices, consumer trends and retail management. In particular, these fields are relevant as they are closely related to the area we wish to investigate, namely what trends that can influnce consumers' choice of FDCs in 2020.

The professors' current involvement in these fields was furthermore crucial to the trustworthiness of the trends they identify. In order to be able to identify the most predominant trends in the year of 2020 the professors were to be updated about the latest theory and research within the fields mentioned above. Hence, this was a requirement for participation. Additionally, when identifying relevant professors it was important that they hold a PhD. or were about to finish such a degree. A PhD. officially indicates that the professors were researchers within certain theoretical areas and thereby had conducted specific research and possess deep knowledge within the field of quest.

It can be argued that the recruited professors should possess a higher degree of knowledge within retailing and distribution channels. Unfortunately, the few professors possessing this knowledge in Denmark were not able to participate in the interviews. Hence, we assess the consultants within the field of retailing and distribution channels that participated in our interviews compensate for this absence. Even if these specific consultants were not necessarily involved in academic research they do too conduct and hold knowledge of new research. They have a profound knowledge about the market while having an in-depth theoretical background.

2.9.3 Commercial Consultant

When selecting commercial consultants for the interviews it was important that they had different approaches in order to perceive the future from diverse sides and thus obtain a higher degree of trustworthiness in the study. The five consultants participating in the interviews worked in institutes for future studies, retail or trends, and all with a focus on retail management, consumers, consumption and/or food. Also, one consultant was CEO/director for an acknowledged research company within retailing, consumption, branding and marketing. This mix of relevant consultants enable us to receive data on the future from more than one perspective, hence we obtain a more holistic picture of how trends influences consumers' choice. The consultants' relevant insights and the professors' knowledge create synergy when enlighten future trends. Furthermore, the consultants have worked in their fields for several years (6 to more than 20 years), which facilitate them to create qualified pictures of the future.

2.10 Data collection – the execution of the Delphi inspired method

The following section provides details about how the data collection was executed and which knowledge we wished to obtain through the data collection. It is explained why this particular knowledge is relevant to answer the research question and why modifications of the Delphi method were made.

The data collection consisted of two rounds of e-mail interviews. The e-mail interviews were loosely structured and send in a word document, which the experts were to fill out. The first interview took approximately 30 minutes to fill out, while the second approximately 15 minutes. The experts were invited to participate in the e-mail interviews by e-mail nine to ten days before the e-mail interview were to be answered. Those experts who did not answer our request on participating in the interview within four days were contacted by phone. All experts were given minimum six days to fill out the first e-mail interview and four days to fill out the second.

2.10.1 Interview round 1

The aim of interview round 1 was to identify trends that can influence the segment's choice of FDCs. These future insights are vital to create a possible future scenario and to evaluate which channel attributes that will be significant for segment. In order to gain this knowledge the ten experts were to identify and name 5-10 trends they found important and to be the most predominant by 2020. More specifically, the experts were asked to name each trend they identified, carefully describe what defines the trend and how it had arisen. Additionally they were asked to argue how they believe the trend can influence consumers' daily life, routines and attitudes in the year of 2020. After identifying the trends, the experts were to rank the trends on how influential the trends were assumed to be on consumers' choice of FDCs in 2020 on a scale from 1-6. This allowed us to identify trends can predominantly influence the segment's choice of FDCs. The design and way of wording was kept as simple as possible. We assessed that too long descriptions and question could result in experts backing out or not wanting to participate. However, the research problem, guidelines, and questions asked had to be rich and targeted enough in order to gain trustworthy data. The e-mail interview can be seen in Appendix 3. The nature of the interview was semi-structured as described and argued earlier in the chapter. This implies that while asking specific but open question we do not exclude the opportunity to receive crucial views from the experts and thus important prospects of the future. At the same time this data gave us information about what trends are the predominant from the experts' point of view, and thus which trends to describe in the future scenario.

Most of the participants agreed to answer by e-mail, which is consistent with the recommendations of conducting the classic Delphi method, where all interviews are answered in writing. Three experts declined to participate in the interviews by e-mail and requested to answer the e-mail interview by phone. They argued that if the questions were answered by e-mail their answers would not be trustworthy enough as they were forced to think about precise formulations, which would limit and control their creative thinking and reasoning.

We accepted the argument because agreeing on the different way to participate respects differences in personal preferences and characteristics of the experts. This enhanced trustworthiness of the study as possible uncomfortableness might affect the three experts' answers. The fact that not all interviews were conducted in written material results in the fact that the Delphi method is only *partly* employed, and thus this study is merely inspired by the original Delphi method. According to Helmer and Rescher the Delphi method reduces "*the influence of certain psychological factors, such as specious persuasion, the unwillingness to abandon publicity expressed opinions, and the bandwagon effect of majority opinion*" (Makridakis and Wheelwright, 1987: 498), and argue that the best way to avoid these factors is to conduct questionnaires. We made several attempts to avoid these factors in the three requested phone interviews. First and foremost, the experts were asked to prepare for the telephone interview and to follow the structure of the e-mail interview when answering the questions. In this way our time of speech is limited as much as possible and we do not find our presence on the phone to have any decisive negative effects; we did not prime their answers' by expressing our own opinions, which is why this factor had minimum influence.

By structuring the telephone interview in the same way as the e-mail interview the experts' answers could also easily be grouped in exact the same way as if the questions were answered by e-mail. Furthermore, we do not believe the unwillingness to abandon public expressed opinions prevented us from receiving rich descriptions nor affected the trustworthiness of the study, as the answers were handled anonymously.

Instead, we found that the telephone interviews resulted in rich data. As Linstone and Turoff argue the Delphi process tends to "*minimize the feelings and information normally communicated in such manners as the tone of a voice, the gesture of a hand, or the look of an eye. In many instances these are vital and highly informative part of a communication process*" (1975: 7). We support this view as the telephone interviews longing for 30-45 minutes each caused at least as in-depth descriptions and reasoning of the trends as from experts answering the questions by e-mail. Even more, the telephone interviews also had the advantage of being able to make the experts elaborate on some trends and points, which resulted in thorough understandings of their views. In this study it can therefore be argued that conducting all the interviews by phone could have resulted in deeper perceptions of the experts' findings and views. As the telephone interviews were the last interviews in the data collection progress it was not possible to conduct all interviews as phone interviews.

2.10.2 Interview round 2

The second and last questionnaire aimed to validate the categories identified by us from interview one, to ensure that consensus was obtained, and identify the most predominant trends. Based on the experts' descriptions, arguments and ratings we renamed and classified the identified trends into categories. From these categories we carefully selected six giga trends that seem to be the most predominant from the experts' point of view (section 2.9.3) specifically describes how the data was analyzed), where the experts were to rank the trends by dividing 100 points between them. The aim was to verify that we interpreted their responses correctly and to be given a clear indication of how influential the six trends are in relation to which extent the trend can affect consumers' choice of FDCs in the year of 2020. Furthermore they were to argue for their choices as it is important for us to know their reasoning in order to understand and analyze their answers. The design of the second and last e-mail interview can be seen in Appendix 4. All the experts answered the second round of interviews by e-mail, where 8 out of the 10 experts participated. In interview round two we do not assess that it was necessary to conduct the interviews on the phone as we already received long descriptions of the trends. Thereby, the second round of interviews was consistent with the Delphi method.

2.10.3 Analyzing the data: interview round 1

In this section we carefully describe and argue for how the collected data from interview round 1 was analyzed. The experts' descriptions and views are evaluated qualitative by coding, classifying and categorizing the trends. As described in section (2.9.1) the experts were to rank the trends they identified, which entails mathematical principles when evaluating consensus between these, but no statistical estimations. Hence, analyzing the data from both rounds of interviews involves qualitative assessments with mathematical principles.

Figure 2.5, Analyzing the data

Analyzing the data: Delphi inspired interviews

- **X.X.X Data from interview round 1: Coding, classification and categorization of trends**
- X.X.X Data from interview round 2: Evaluating the influence of the identified trends

Source: Thesis illustration

Step 1: In the first round of interviews the experts all together identified 56 trends, which they assess can have a high influence on consumers' choice of FDCs in the year of 2020. All these trends were listed in order to get an overview of the identified trends, which can be seen in Appendix 5.

Step 2: The second step consisted of gathering the trends by coding the trends that had the same characteristics. Gibbs argues that:

> "Coding is how you define what the data you are analyzing are about. It involves identifying and recording more passages of text (…) that, in some sense, exemplify the same theoretical or descriptive idea. Usually, several passages are identified and they are then linked with a name for that idea – the code" (Gibbs in Robson, 2011: 474)

Gibb's method of coding is consistent with how we coded the experts' descriptions. We carefully considered and evaluated the names, themes and descriptions of the trends provided by the experts. For instance, one expert said about *the local* trend "We shop local – local ingredients from the current season". Another expert said about the *The Nordic Food Trend*: "Retailers and producers of convenience food have adopted the Nordic kitchen, and emphasize the use of local ingredients". A third expert explains about the *local* trend: "The Local kitchen is a trend (…). Local food, local ingredients, own harvest etc". A fourth expert also name a trend "Locally produced food" and explain the trend as that the Danish people favor local food. Hence, even though the four experts named the trends differently, the descriptions and characteristics were very much alike and thereby identified the same trends. Based on these names, themes and descriptions we choose to gather the trends in one trend, which then is called "The Local Trend". In sum, by coding the experts' descriptions we identified trends with the same themes, and found a high degree of consensus between the trends. In this process we minimized the number of trends from 56 to 29 trends, which indicates a high degree of consensus between the trends the experts identified. A full list of the process of minimizing the number of trends is available in Appendix 6.

Step 3: After gathering the trends we classified the trends into fads (fashion trends), mega trends and giga trends as illustrated in figure 2.6. We sat up criteria for both giga trends, mega trends and fads, and went through every trend in order to evaluate which criteria each trend fulfilled, and thereby if a trend is a giga or mega trend, or a fad. To evaluate which criteria the trends fulfilled we applied the definitions of the trends held up against the experts' descriptions of the trends.

Figure 2.6, Classification of trends

Giga	**Mega**	**Fad**
Criteria: - Can cause radical change which manifests in the daily routines and values of businesses, organizations and individuals of a society. - Often last for approximately 20 to 30 years - Can become increasingly predominant in society over time	**Criteria** - Are not as influential as giga trends - Last around 2-8 years - Can have influence on how businesses and individuals in a society act, but is more prevalent within specific markets, consumer groups or subcultures and does not affect society as a whole.	**Criteria** - Usually dictate fashion - Spread fast and widely between countries and individuals. - The strength is fairly shallow as these only have an impact from a few months to 2 years and do not involve any significant change in society.
Time/Convenience A Healthy Life A Search for Authenticity Legislation Price Awareness Automatization Polarization Ethical/Sustainable Awareness Aging Society Increased costs Economic Downturn	Self-branding, The Local Trend, Semi-convenience, Health Realism, Functional Foods, Transparency, Less Is More, Customized Diet, Value For Money, Deals, Discount vs. High-end, Self-service, Home Management System, E and M Commerce, Eco Food Print, Bundling, Inspiration from South America, Food with a (Hi)story, Food Miles	Micro Trends

Source: Thesis illustration, interview round 1

For example, one expert explains the trend *Time/convenience* as a trend that has been here for some time, still is and will continue to be in 2020. The expert also describes many different ways in which this trend influences consumers' daily life and routines. As the expert assessed the trend would last for a very long period of time, and as the trend has major impact on our consumer segment's everyday life we classified the trend as a giga trend. Hence, for a trend to be classified as a giga trend, it must be indicated by an expert that it can cause radical change in society and last for 20-30 years.

We identified one fad, which consisted of a description of that fads will occur in 2020. However, since fads only last few months to 2 years we cannot predict which fads will occur in 2020. That would be pure guessing. For this reason we abandoned the trend called "Micro Trends".

In this process we also abandoned three other trends. The first trend we abandoned, Inspiration from South America, concerned that South American food will gain popularity for the reason that Brazil hosts world championships in football and the Olypic Games in 2014 and 2016, and due to Brazil's economic growth. However, we assessed that this trend was more related to the choice of food than to the choice of distribution channel, and hence not relevant enough to continue with. Additionally, we abandoned the trend Functional Foods. The trend was about that there increasingly will be produced food with functional qualities such as meet with extra proteins and chocolate bars with vitamins; that is, food with added "values". Lastly, the trend Designer Foods was abandoned as it concerns food like energy bars, probiotic yoghurts. Again, we believed that these trend concerned food choice, and not the choice of channels.

Step 4: In step 4 we reduced the trends from 29 to 11 by categorizing the mega trends under the themes of the giga trends. This we carried out by carefully examining the themes and keywords in the description of the mega trend provided by the experts, which enabled us to understand the core characteristics of the mega trend.

The mega trend was afterwards related to the giga trend with the same characteristics. Comparing keywords and themes between the mega trend and the giga trend enabled us to connect the mega trend to the giga trend. This is illustrated in the example below:

> The giga trend Time /convenience was described by one expert: " We still get **more busy** but also want to prioritize more **time** with our family when we finally have **time off.** (…) **Convenience** will continue to be a trend in 2020 (Interview round 1. Own translation)".
>
> The mega trend semi-convenience was described as: "In spite of the Danish middleclass' general reluctance to buy **readymade** foods a market for up-market **convenience** (a la Mark & Spencer) will develop as the upper middleclass will **prioritize their time** harder and harder – an some of the will not compromise on the quality of their food either" (Interview round 1)

In the example we can see that it is the same buzzwords, time and convenience that characterize both trends. This activity was performed with all the mega trends. In the matrix in Appendix 7 it can be observed which buzzwords that were found in both the mega trends and the giga trends which they were connected to.

Step 5: As demonstrated in figure 2.7 all the categorized trends were then categorized further in the PEST(E) model in order to understand which macro factors the trends are driven and influenced by. Also, this gave us indications of which trends that are driven by more than one macro factor, which is important to understand the trends in larger contexts.

Figure 2.7 Categorization of trends in the PEST(E) model

Political	Legislation, Ethical/sustainable awareness, A healthy life, Increased Cost, Economic Downturn
Economical	Price awareness, Increased Cost, Economic Downturn
Social	Time/convenience, A healthy life, Self-branding, Ethical/sustainable awareness, Polarization, price awareness, Automatization, Aging Society, Increased Cost
Technological	Automatization
Environmental	Ethical/sustainable awareness

Source: Thesis illustration

For instance, an expert identified the mega trend *home management system*, which can be exemplified as an intelligent fridge that can read what is in the fridge and can order food automatically. The expert says about this trend that the development of it is both determined by the improvement of IT, but mostly related to how fast the Danish consumers take it to heart. Thus the development (speed and direction) of this trend, which we further categorized to the giga trend *Automazation*, both depends on technological factors and social factors.

Step 6: In step 6 we evaluated the rankings of the trends given by the experts in order to see if there were consensus on how influential the trends are assessed to be in 2020. The experts ranked the trends from 1-6, however we did not evaluate their rakings statistically. This is not possible as the experts did not rate the same trends; more specially, they identified the trends themselves, and if measured the distribution statistically, we would not measure the rankings on the same trends. Instead, we applied mathematical principles. This consisted of systematically go through the giga trends with the mega trends connected to it. We evaluated how many experts ranked the trends and how high the rankings were. This we have illustrated in the example below:

Figure 2.8, Example of ranking the trends

Giga trend	**Time/Convenience (1) (1)**
Mega trends	**Bundling** (1), Integration of Functions (6)
	Home Management System (4)
	Semi-convenience (1), Restaurant Take Away (3), Up-market convenience (2)

Source: Thesis illustration, physical paper notes

From the figure above we can see that the giga trend "Time/Convenience" and the categorized mega trends have been rated eight times by the experts, and that it have received high points (1 point 4 times, 2 points 1 time, 3 points 1 time, 4 points 1 time, 6 points 1 time). Based on these ratings we choose to go further with the trend. We went through the same process with the other giga trends, and evaluated that Time/Convenience, A Helathy Life, Ethical/Sustainable Awareness, Price Awareness, Automatization and A Search for Authenticity were the trends ranked as most influential in 2020. Hence, based on the ratings we also found a high degree of consensus of the giga trends, and are the ones we choose to go further with in interview round 2.

Several trends were abandoned:

Figure 2.9, Abandoned trends

Abandoned trends
Economic downturn: Only one expert identified this trend. Therefore, the trend received 1 rank, hence we do not assess the strength of the trend is strong enough to continue with.
Aging population: Only one expert identified this trend. Therefore, the trend received 1 rank, hence we do not assess the strength of the trend is strong enough to continue with.
Increased cost: Only one expert identified this trend. Therefore, the trend received 1 rank, hence we do not assess the strength of the trend is strong enough to continue with.
Legislation – laws about supermarkets' opening hours (shop acts): One expert identified this trend, and was therefore rated low. For this reason it is not strong enough to continue with.
Polarization: Polarization (that people will both shop food in high-end *and* discount distribution channels) were rated high by the experts. However, this trend was abandoned as the trend indicates the underlying motivations for consumers' choices, and thus is a "result" of what influence consumers' choices. Instead, this polarization is expressed in the trend of *Price awareness,* due to the reason polarization is also an expression of focus on price.

Source: Thesis illustration

2.10.5 Analyzing the data: interview round 2

Figure 2.5, Analyzing the data

Analyzing the data: Delphi inspired interviews

- X.X.X Data from interview round 1: Coding, classification and categorization of trends
- **X.X.X Data from interview round 2: Evaluating the influence of the identified trends**

Source: Thesis illustration

As clarified in section 2.9 the aim of interview round 1 was to identify trends that can influence the segment's choice of FDCs, whereas the aim of interview round 2 was to verify that we interpreted their responses correctly and to be given a clear indication of how influential the six giga trends are in 2020. In interview round 2 the experts were to divide 100 points between the trends, which is illustrated in figure 2.10.

The data from interview round 2 is analyzed throughout the empirical data analysis. First and foremost, the experts' descriptions and views of the 6 giga trends are analyzed in section 4.1 (Evaluation: speed and direction of trends) together with the descriptions and views from interview round 1, supported by a desk research as described in section 2.8.1. When evaluating interrelations between the trends (Cross-impact analysis) the data from interview round 2 are indirectly applied as the evaluation of interrelations is mainly based on section 4.1

(Evaluation: speed and direction of trends). Most importantly is interview round 2 when evaluating the impact and certainty of the trends. Here we are evaluating the experts' rankings in order to assess how high impact the trends can have on the segment's choice of FDCs. Both how high each trend is rated is assessed, but also if there is consensus between how the experts rated the trends. For instance, consensus for A Search for Authenticity is low as the experts rated the trend very differently, while consensus is high for Automatization (refer to figure 2.10 below).

Figure 2.10, Rankings from interview round 2

Giga trends	Ranks
A healthy life	11+20+10+15+10+20+30+5=**121**
Time/Convenience	30+25+40+30+25+10+22+30=**212**
A search for authenticity	5+15+15+5+20+4+0+15=**79**
Automatization	19+15+25+25+5+12+15+20=**136**
Ethical and sustainable awareness	15+15+10+0+10+4+15+10=**79**
Price Awareness	20+10+0+25+30+50+18+20=**173**

Source: Thesis illustration, interview round 2

After conducting interview round 2 we became aware that the trend Price Awareness should have been stated differently in interview round 2. The way we described the trend for the experts did not indicate any particular change towards 2020, as it more or less only was an expression of that consumers evaluate both price and quality when they choose FDCs. Consumers have always evaluated these attributes, and if they evaluate these attributes to a higher degree in 2020 it will be a very subjective evaluation, which is difficult specify. Instead we found that Price Awareness, as it was described by the experts in interview round 1, was an expression of a Polarization between discount and high-end channels, and in this connection also price and quality. How we have chosen to handle this difficulty and misinterpretation is explained and argued for in the very next section (2.11).

2.11 Trustworthiness and authenticity of the study

Due to the methods we apply to collect the data and to conduct the empirical analysis this study is qualitative with mathematical principles. Measuring validity and reliability are often evaluated different in qualitative research compared to quantitative research since qualitative research only appears to accomplish nuances of measurement. (Bryman and Bell, 2011: 394). Bryman and Bell argue: "*Since measurement is not a major preoccupation of qualitative researchers the issue of validity would seem to have little bearing on such studies*" (2011: 395). Therefore, the complexity of this qualitative study with mathematical principles must be evaluated accordingly, and alternative criteria for evaluating reliability and validity in qualitative research must be applied.

Several alternative criteria for evaluating validity and reliability were considered including LeCompte and Goetz', Lincoln and Guba's, and Hammersley's (Bryman and Bell, 2011: ch. 16), however it was evident that no of the alternative criteria we identified truly matched the concerns of validity when studying the future. In a future study the internal validity is crucial as this question whether the study is able to make a trustworthy account for the future (Hasson and Keeney, 2011: 1700). Here we agree with a number of authors (Hasson and Keeney, 2011. Cornick, 2006. Holloway and Wheeler, 1996. Day and Bobeva, 2005) that Lincoln and Guba's alternative criteria for evaluating reliability and validity are the appropriate criteria to apply when studying the future and when both applying qualitative and quantitative principles. Lincoln and Guba propose two criteria for evaluating qualitative research: *trustworthiness* and *authenticity*. The former is represented by four criteria: credibility, transferability, dependability and confirmability.

Credibility refers to whether we as researchers have interpret the participants views correct (Member checks, in this case with the experts), which is crucial to evaluate in this study as we received an extensive amount of data that must be analyzed systematically in order to create a trustworthy study. *Dependability* entails that one must ensure that, "*all records are kept at all phases of the research process*" (Lincoln and Guba in Bryman and Bell, 2011: 398). Not only this is important to give other researchers the ability to assess if our findings can be reassigned to their cases. It is also crucial in order to enhance the comprehension of the study for readers. *Confirmability* involves ensuring that our personal values and preconceptions as researchers have influenced the study as little as possible. Since this is mainly a qualitative study confirmability is central to assess, and we must clarify if we as researchers have influenced the findings of the study. *Transferability* can be established through verification of the findings from the data collection; more specifically, the findings derived by applying the Delphi method. Lastly, *authenticity* becomes one the most important concepts in order to evaluate if this future study is able to give a trustworthy state of the future. In this regard, we evaluate the weaknesses and strengths of the methods and choices made. According to Bryman and Bell, Lincoln and Guba's concept of authenticity is mostly evaluated when executing action research. Since this study is not occupied by action research as a research method, we have chosen to apply relevant aspects of authenticity; that is the criteria fairness. (Bryman and Bell, 2011: 394-401. Hasson and Keeney, 2011).

2.11.1 Credibility

2 rounds of interviews

As highlighted throughout the research design we conducted two rounds of Delphi inspired interviews. Firstly, this effort was made as we seek to reveal the most predominant trends in 2020, and therefore aiming to obtain consensus between views and identifications of the experts. The high degree of consensus that was found thereby indicates strength of the findings. Secondly, as stated in section 2.10, we chose to conduct two rounds of interviews in order to validate that our interpretations of the experts' views and identifications of trends were correct, which is important to attain high credibility. Engles and Kennedy (2007: 436) support this view, and suggest that credibility is enhanced due to the iteration and feedback given to the expert panelists. Particularly, this becomes significant in our study. We are aiming to understand the experts from their views; therefore, the experts are the only ones to legitimately judge if our interpretations of their views and identifications are credible. In the second interview they ranked the trends, and argued for their rankings, which enabled us to understand if they believed the trends and our interpretations were important and relevant or not. Hence, by sending out the second interview we are given indications of if our interpretations of their views were correct. The second round confirmed that our interpretations were successful. This we can observe from their rankings and descriptions, which express a high degree of agreement in our interpretations. However, as we mentioned in section 2.10, the second interview witnessed that one trend (price awareness) was not interpreted entirely correct. This we will elaborate in section below.

Price Awareness versus Polarization of Price and Quality

After interview round 2 we became aware that we instead of abandoning Polarization we should have abandoned Price Awareness. In interview round 2 we described Price Awareness in the following way: "*Price will continuously be a significant factor when consumers choose food distribution channels, however quality is still evaluated."*, which the experts then were to rank and argue for. Firstly, as one of the experts pointed out, this does not indicate any change; more specifically, consumers always evaluate price and quality against each other when buying. For this reason this expert rated the trend with 0. Secondly, we became aware that when the experts described how and why price is an important trend the majority did not only describe Price Awareness, they described Polarization. Polarization is defined as that consumers buy food in *both* discount and high-end. More specifically, most of their products they will buy in discount channels, but food they perceive as very important they will buy in high-end channels. For instance, one of the experts writes about Price Awareness, "*We buy more discount products, and we don't have any problems combining cheap products from Lidl (discount supermarket) with top-class products from Magasin (high-end shopping mall)*"(Interview 2. Own translation). We can also see from interview round 1, that when Price Awareness was described it was in fact Polarization. Therefore, instead of naming and describing the trend according to Price Awareness, we should have named and described the trend in relation to Polarization.

As the experts ranked the trend after Price Awareness we do not assess that it is valid to evaluate the impact (cf. Certainty/Impact Analysis) of the trend with main emphasis on the experts' rankings from interview round 2. This is due to the reason that some experts naturally might have ranked the trend according to the fact that consumers always focus on price and quality, and therefore ranked the trend lower. Hence, if the trend was described according to that the distinction between discount and high-end will increase towards 2020 some experts might have ranked the trend higher.

Therefore, we evaluate the trend according to the experts' descriptions of the trend in interview round 1 and 2, and not with emphasis on the rankings. This we believe can still comprehend a trustworthy picture of the impact of the trend, as the experts described how they perceive the trend. For that reason, we do not assess that this misinterpretation have lead to that the trend is not valid. We can still apply the experts' descriptions and views as they were an overall expression of polarization and not only the fact that consumers are focused price and quality or value for money. 5 out of 8 experts described polarization, and their descriptions indicate that the trend is important. For instance, one expert stresses, "*In 2020 we will still buy food in different channels. Discount to some products and special products other places*" (Interview 2), and rated the trend with 25 out of 100 points, which were divided between the six giga trends. From this and the fact that the other experts mentioned the same aspects we derive that the trend can be important in 2020. Hence, further on in the study the trend is named Polarization of Price and Quality, and is an expression of that both discount and high-end food are demanded by the same consumer.

2.11.2 Transferability

Kennedy (2004: 501) emphasizes that the researcher can establish transferability by verifying the applicability of the Delphi findings. As explained, we apply a desk research in order to support and evaluate the speed and direction of the trends the experts identified. The desk research is completed by using data and reports from reliable sources such as Dansk Statstik [Danish Statistics], Retail Institute Scandinavia, and other research companies within the food industry. Data have also been obtained from a few Danish newspapers, and in this respect we checked if their sources in order only to apply reliable data. These data have taken part in supporting and verifying the findings and views of the experts, and have thus enhanced the transferability of the study.

2.11.3 Dependability

Throughout the chapter of Methodology and Research Design we have sought to enhance the dependability by explicitly explain the logic of what we do and show records of all phases in the research process. That is, careful reasoning and reflexivity of the choices we made during the process of conducting the thesis. These considerations we believe have increased the dependability of the study. We carefully described the reasons for choosing experts as the primary source of data, why the Delphi inspired method was a profound method to gain knowledge from the experts. The experts were carefully selected, and we sat up clear and relevant criteria they must fulfill in order to participate in the interviews. Furthermore, to obtain a high degree of dependability Hasson and Keeney (2001:1700) argue that the researcher must provide a detailed description of the analysis process. How we analyzed the data is explicitly described, and we made the process of analyzing the data transparent. In turn, this should increase the understanding of the procedure we generate findings from. Lastly, we clearly stated how we conduct the empirical analysis, and why we took support in several analytical tools to analyze the complete data supply (interview round 1 and 2 and the desk research). Thus, by ensuring records of the research process we enhanced the understanding of the study for readers and the opportunity to apply the same process in a different context and by other researchers.

2.11.4 Confirmability

As stated in section 2.7 we acknowledge the fact that due to the qualitative nature of the study (with mathematical principles) can be affected by our own preconditions and personal values and can thus complete objectivity is not possible. We have made several attempts to avoid this pitfall, but also recognize that some aspects in the thesis could have had a higher degree of confirmability.

Personal Values

In the process of analyzing the data from interview round 1 we identified several patterns in the data (trends) we received from the experts. Especially, during this process it was important to pay attention to the way we interpret their findings, and be aware of our own personal values and assumptions. We have been conscious about these pitfalls and have carefully discussed and reevaluated our interpretations. For instance, when categorizing the trends (step 4 in section 2.10.3), which consisted of linking mega trends to giga trends with the employment of themes and buzz words, we went through the process several times. Additionally, we made handmade drawings of the connections in order to ensure that the categories were consistent and not affected by our own personal values. Secondly, letting the experts evaluate our interpretations in interview round 2 amplified the confirmability as our interpretations were evaluated by the experts and thereby seen from more sides. Thirdly, the fact that we were two researchers during the process of the study enhanced the confirmability. The choices and judgments made in the thesis are deliberated from two viewpoints, which reduce the possibility to transfer individual biased beliefs. Thereby, we have made several attempts to avoid our own personal values, which have increased the confirmability of the study.

Preconditions

As mentioned, we apply a cross-impact analysis in order to evaluate if and how the six giga trends are interrelated. Originally, the aim was to make the experts execute this evaluation. Due to the experts profound knowledge we believed that they would be the most appropriate people to conduct this exercise. However, we came to understand that it would be a too extensive workload for the experts to execute. It would take them a couple of hours if they were to complete the analysis, and for that reason it would be difficult to persuade the experts to participate in the interviews. Therefore, we choose to conduct the analysis based on the interviews and the findings from the first step in the empirical analysis (Evaluation: speed and direction of the trends) and the two rounds of expert interviews. In this regard, it can be argued that the cross-impact analysis would have a higher degree of confirmability if the experts executed the task. On the other hand, when we evaluate the interrelations we execute the analysis based on their views from the interviews, which is why we appraise that the findings are still applicable and trustworthy to go further with.

2.11.5 Authenticity

In this study the evaluation of authenticity becomes particularly important. No one can create a complete picture of how the future will evolve, however we have sought to provide as plausible presentations of the future as possible. In this respect, we have made several attempts to enhance the authenticity of the study. Beneath we elaborate on the weaknesses and strengths:

Experts - the primary source of data

Firstly, experts as a primary source of data become significant to execute an authentic study of the future. Experts have a profound knowledge and are continuously updated in their research/working field. Therefore, they have a better understanding of how consumer behavior can evolve than ordinary people. The knowledge they possess matches the relevant criteria we developed in order to ensure as authentic findings as possible. In turn, we received valuable data from the expert interviews, which has made it doable to create as trustworthy pictures of the future as possible.

Expert sample

Thirdly, as we clarified earlier, 10 out of 29 experts in Denmark that lived up to our criteria participated in the interviews. 10 experts can be argued to be few; however they represent 30% of the experts identified to be relevant to the study. Additionally, there was a relevant and diverse mix of experts in our sample. Even though they had different backgrounds we found consensus in their findings and views, and for this reason we believe that these findings could be found in a larger sample. Therefore, we consider that the sample of 10 experts created a trustworthy representation of future trends that can influence consumers' choice of FDCs. In the second round of interviews only 8 of the 10 experts participated. Still, it was evident from the experts' rankings and arguments that there was a high consensus between the experts on which trends can have the highest impact on the segment. For that reason, we believe that if all 10 experts participated in the second round the results would not vary significantly, and thereby not affected the study considerably.

Written versus telephone interviews

Secondly, as we highlighted earlier, some of the interviews were conducted by phone and not by e-mail (in written) as the classic Delphi method suggests. Although it is not consistent with the Delphi method to conduct telephone interviews we believe it increased the authenticity of the study that three of the interviews were conducted by phone. Firstly, we respected the experts' preferences of conducting the interviews by phone. They clarified that if they were to answer by e-mail they would have to think about their formulations, which could bound and direct their creative way of thinking. Moreover, the telephone interviews lasted for 30-45 minutes. This enabled us to receive in-depth description and the opportunity to make the experts elaborate their views and on trends they identified. Hence, as we discussed in section 2.10 conducting all interviews by phone could have resulted in deeper insights. One the other hand, some experts preferred to conduct the interview by e-mail. As one expert said, when we called and asked him to participate in the interview, "I best like to write it down for myself" (Phone call, 12.04.2012). This shows that the experts have different preferences and way of approaching tasks, which must be respected in order to gain trustworthy insights. Hence, we assess that by appreciating that the experts have diverse preferences and approach tasks differently, we have achieved a higher degree of authenticity.

Definitions of trends in the Delphi interviews

In the process of designing the e-mail interviews we originally prepared to include a definition of what a trend is, and explain the difference between what we define as fads, mega trends and giga in order to receive targeted and relevant data. Further, we also considered only to ask the experts to identify mega and giga trends, as fads only are present in few months to two years. However, after discussing advantages and disadvantages we choose not to clarify these definitions for several reasons. Firstly, the amount of text the experts were to read in order to conduct the interview was already heavy, and if the text was too long the experts might lose interest when reading, or in worst case refuse to participate. Secondly, setting up definitions could result in controlling the experts' creativity. It could make it difficult for them to think out of the box or make their thoughts fit into a formula. Thirdly, we might miss out on important views and identifications by determining definitions. After receiving the interviews it was clear from the experts' descriptions that they identified both fads, mega trends and giga trends, which made the process of analyzing the data more extensive and complex, and increased the possibility of misinterpret their findings. Since there was a high agreement between the experts in the second round of interview and as we experienced very few opponent views, we believe that our interpretations of their findings were plausible. The misinterpretation regarding the trend Price

Awareness was not caused by the fact that we did not define trends, but was a matter of us not seeing the relations between views offered by the experts.

Therefore, when considering the advantages and disadvantage of not providing a definition of trends, we believe that the advantages weight highest, and that our choice has provided a more authentic study.

Mix of methods

Engles and Kennedy (2007: 436) stress that a higher degree of authenticity can be obtained undertaking additional methods to Delphi method. Here, we believe the various methods that we apply in the empirical analysis have resulted in a more authentic study of the future. Studying the future is complex, and therefore this study calls for a consistent and systematic execution that can manage the many complex variables (trends) we have come in possession of. These must be analyzed and evaluated in several different ways before a complete and plausible scenario of the future can be created. In this respect, the desk research, the Cross-Impact Analysis and the Certainty/Impact Analysis have facilitated this ambition. The methods complement each others' weaknesses; that is, the Delphi method does not fully facilitate in evaluating the interrelations between future findings and the impact and certainty of these findings. This, empirical analysis methods compensate for. Thus, the total assessment of the empirical analysis has created a plausible picture of the future. In other words, the extensive mix of relevant methods has enabled us to conduct the study, and to create a qualified assessment of which trends can influence consumers' choice and which channel attributes are significant to the segment in 2020. Hence, this part has highly increased the authenticity of the study.

2.11.6 Summary trustworthiness and authenticity of the study

We enhanced the credibility by executing two rounds of expert interviews, and to increase the transferability we support the data supply from the experts with a desk research that underpins the experts' findings. The dependability was improved by clearly explaining our reasoning for the choices made in the Methodology and Research Design, and by ensuring records of the research process. To increase confirmability, we made several efforts to evade our own personal values. We reevaluated our interpretations of the data and the experts evaluated these interpretations. Further, we ensured that all choices and judgments are deliberated from at least two viewpoints (viewpoints of us as researchers and the experts). To increase the confirmability further we could have let the experts evaluate the Cross-Impact Analysis, however since this was not possible we executed the analysis based on their views from the interviews, and therefore we assess that the findings are still applicable to the study. Therefore, while complete depictions of how the future will evolve cannot be attained, we made a number of attempts to conduct as trustworthy a study as possible. These we propose have resulted in a high degree if trustworthiness.

The fact that we employ experts as the primary source of data is pertinent to depict a plausible future and to generate authentic findings. Our expert sample consists of some of the most profound experts in Denmark within our field of study. Further, we have applied an extensive and relevant mix of empirical data analysis methods, which enable us to create a credible assessment of the future. We appraise these efforts have resulted in a high degree of authenticity in the study.

2.12 Collection of secondary sources

We used a few methods to find relevant information about methods regarding studying the future and to collect the most appropriate theories regarding consumers' choice and channel attributes.

Textbooks were gathered in Copenhagen Business School's library and at Lund University (School of Economics and Management). Research journals were collected using the online portals Summon available on Live@Lund and Copenhagen Business School's student portal.

References in textbooks gave us an understanding of which researchers have a prominent knowledge and research records within our field of study. In textbooks and journals we discovered specific wordings such as "choice" and "channel attribute" when searching for literature for the Literature Review. When searching for literature on methods for studying the future we used buzzwords such as "Delphi", "future method" and "scenario". In journals we searched the reference lists in order to find literature that could elaborate more on subjects that was not clarified properly.

When searching for literature on methods to study the future it was evident that especially the Delphi method has developed over time. Therefore, we aimed to review literature from the early 1970s and up to 2011 in order to gain a comprehensive understanding of the method. Further, we searched the internet for relevant information when conducting the desk research, where we aimed to apply reliable sources such as Dansk Statistik [Statistics Denmark], Retail Institute Scandinavia and Institute for Future Studies.

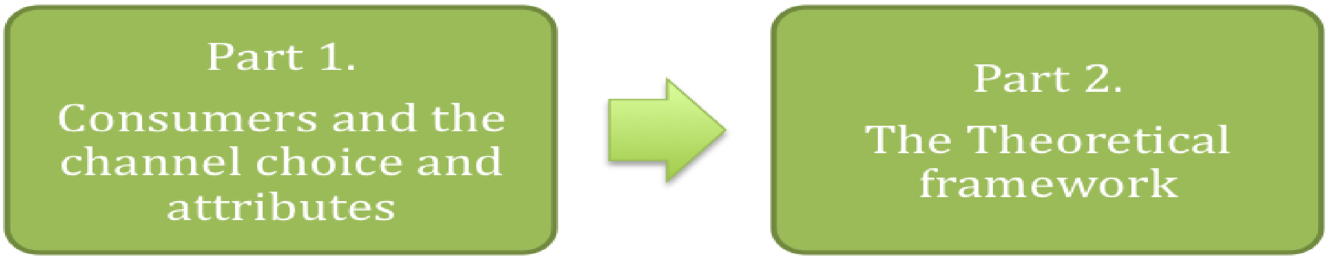
The theory applied in the literature review revolves around consumers' choice in relation to consumers' preference of retail and FDCs. It has a broad temporal perspective, as the review is constructed in a historical chronological order. This approach was chosen due to the fact that we wanted to test if these theories can be applied in 2020 and therefore we did not want to find gaps and criticize theory but merely wanted to understand and portray how theory has developed over time. This essential means that some of the theories applied are old. However, we assess that this was not a problem as long as newer research within the past decade was present, which then could represent the changes and modern perspectives on the subject.

We are aware that more research in the area of consumers' choice and channel preferences exists and we could have brought in more perspectives. However, research about consumers' choice and channel preferences have been conducted since the early days of consumer research (Ekström, 2010) and therefore it would be too extensive to include all the theory in the thesis. The research presented in the review is therefore a sample of the different perspectives within consumer decision process and channel preference.

3.0 LITERATURE REVIEW AND THEORETICAL FRAMEWORK

This chapter presents an overview of the knowledge and ideas written within the field of consumers' choice of channels and the channel attributes. The literature review is executed to obtain a deeper understanding of the research field mentioned above. The theoretical framework consists of an extraction of the channel attributes identified from the theory in the literature review. The theoretical framework will be applied in the forthcoming discussion of the findings from the empirical analysis and the scenario of 2020. Additionally, the theoretical framework and the theories presented will help facilitate the discussion and support answering of the research question.

Figure 3.1, Literature review and theoretical framework



Source: Own contribution

This chapter is divided in two parts. The first part presents the theory established within the channel choices and channel attributes. This part is presented in a historical order to illustrate how research has developed. The literature review will shed light on the following:

- Consumers channel choice and channel attributes
- Store versus store
- Online and offline
- The Internet
- Multichannels

The review take on a fairly neutral approach since we do not seek to identify gaps in existing literature but aim to understand the context of how consumers reason during a channel choice today and how research has progressed. Hereafter, the third part will present the theoretical framework, which has been extracted from the theory of the literature review.

3.1 Consumers channel choice and channel attributes

In this section will we briefly sum up the choice process consumers engage in when choosing FDCs. As mentioned in the Introduction (chapter 1) consumers' choice of FDCs is characterized as a habitual choice. In a habitual decision-making consumers rely on alternative options from their consideration set (Johnson and Kujala, 1993). In the antecedent stage of the channel choice consumers are influenced by personal factors and situational factors (Gehrt and Yan, 2004, Neslin et al. 2006). In the antecedent stage of a channel choice, consumers evaluate the channel attributes and weigh out advantages and disadvantages of the channel alternatives. Consumers choose a channel according to how well the channel attributes meet their preferences (Gehrt and Yan, 2004). Hence, consumers choose the channel with the most attractive bundle of attributes to offer.

A channel attribute is sometimes referred to as a channel determinant. Ultimately, this name is derived because they can determine the consumers' final choice. The literature review will elaborate on other channel determinants namely those of the situational factors and consumer factors, as these are not always separated from the channel attributes in the literature. Channel determinants within situational factors are external effects, for instance temporal issues. The situational factors cannot be controlled by anyone, as they are random external circumstances (Gehrt and Yan, 2004). Apart from preferences, personal factors can be consumers' characteristics, which are determined by consumers' personality. These personal factors are highly subjective and cannot be manipulated by marketers (Ibid). Channel attributes are those channel characteristics consumers evaluate and can have preference for. The channel attribute can to some extend be manipulated by the channel. For instance, marketers can lower their prices to please the consumers (Gehrt and Yan, 2004). It is the channel attributes that consumers evaluate in the antecedent stage, which marketers can manipulate, that we wish to extract in the theoretical framework and test later in the discussion.

Much research has been conducted on channel attributes in retailing and some of these are specifically concentrated on FDCs (Stephenson, 1969, Gripsrud and Horverak 1986, McCorkle and Reardon, 2002, Hansen, 2006). However, in order to get a comprehensive perspective of existing research we do not only examine channel attributes of FDCs but also draw on research concerning other retail distribution channels.

3.1.1 Store versus store

Stephenson's (1969) study investigated consumer preference of food channels where he found six attributes that had an impact on consumers channel choice. The attributes were discovered through a survey where consumers were introduced to a new supermarket. The six attributes Stephenson (1969) identified were advertisement, product selection, convenience, friends, price and dependability of the store. The consumer preference was measured against the consumers' ideal supermarket and regular supermarket. The result revealed that those who changed from the regular store to the new supermarket did so because the new store was rated closer to the ideal supermarket than the old supermarket. From this result Stephenson (1969) proposes that the attributes are closely related to those attributes discovered in previous studies. He further suggest that consumers will develop preference for the supermarket that offer the most fulfilling bundle of attributes in relation to their ideal supermarket.

Bearden (1977) investigates the difference in consumers' preference of attributes between downtown stores and outlying stores. He discovers seven attributes during his study, some very similar to those Stephenson (1969) discussed. The attributes Bearden (1977) examines are: Atmosphere, price level, quality of merchandise, product selection, location, parking facilities and friendliness of sales people. According to Bearden (1977) four of these attributes were weighted as highly important among loyal consumers of the outlying store. These were atmosphere, location, parking facilities and friendliness of sales people. Even though price level, quality of merchandise and product selection were not significant in Bearden's (1977) study they have been proven to be the most important attributes in other studies (Bearden, 1977). Therefore, he proposes that consumers apply two sets of criteria when evaluating attributes. The first set of attributes is used to judge the overall store image and the second set of attributes concern the choice between downtown and outlying stores. However, Bearden (1977) conclude that downtown stores should improve on those four attributes mentioned above and also attempt to compete on the attributes of overall store image, such as price, quality and product selection, in order to achieve consumer patronage.

Gripsrud and Horverak (1986) criticize past studies by claiming those studies only take single purpose trips into account and do not consider the location of other retailers or service facilities. They argue that consumers are more likely to engage in food shopping in extension of other errands, hence consumers often engage in multipurpose trips. As the trip has multiple purposes, consumers channel choice might be influenced by the location of other facilities that are part of the trip (Gripsrud and Horverak, 1986). In this regard, they argue that it is not only the specific attributes of a given store that influences the channel choice but also other aspects of the shopping purpose. Additionally, Gripsrud and Horverak (1986) discuss the importance of the channels' opening hours and the facilities next to it. Gripsrud and Horverak (1986) demonstrate how the sales figure of a grocery store and the number of customers visiting are affected by other stores' opening hours as well as the grocery stores' own opening hours (Gripsrud and Horverak, (1986). They conclude that while many researchers have found the attributes of channel choice that are most significant, it is important to take channel determinants such as situational factors e.g. other errands of the shopping purpose, into to account as these also can have significant effect on the consumers' channel choice (Gripsrud and Horverak, 1986).

3.1.2 Online and Offline channels

Balasubramanian (1998) argue that earlier research either take offline channels into consideration or online channels. He argues that this is not sufficient as online channels exist along with offline channels and each channel has a unique set of characteristics that enables the different channels to compete in the market. Balasubramanian (1998) particularly highlights sunk cost as a driver for channel choice. He explains that consumers have travel costs including the travel time, the real cost of travelling, and the implicit cost of inconvenience. Besides freight costs, the location of online marketers becomes unimportant, as the consumer gets the products delivered at their home. He proposes that prior research has shown that convenience can be a driver for channel choice.

Balasubramanian also recognizes that offline channels have advantages such as product inspection and the gratification of receiving the product immediately. If consumers require the product straight away they do not have time to wait for the product. Thus, product gratification is an advantage in offline channels. Additionally, Balasubramanian (1998) claims that marketers must consider if the product match the channel, especially when conducting online trade. He argues that when the product quality is certain, and the consumer has no need for receiving the product immediately, the online channels have an advantage. But if the product quality is uncertain and the consumer needs the product immediately the offline channels have the advantage.

McCorkle and Reardon (2002) discuss channel choice in relation to the time spent on each channel. They view channel choice as an optimization problem. They argue that Becker's model of time allocation from 1965 in an extended version can be applied in a contemporary context. McCorkle and Reardon (2002) claim that choosing a channel is a household decision as members of the family have to allocate time and resources to this decision. They (2002) propose that consumers often switch from one channel to another due to time or effort tradeoffs between channels. However, time and effort can be exchanged for a value differential such as entertainment in a mall. Here McCorkle and Reardon (2002) argue that consumers obtain utility from the shopping trip. In this respect, utility not only encompass explicit utility but also the experience of entertainment can be defined as a utility. Drawing on Becker's theory they explain that the choice between channels depend on the amount of utility obtained (maximized utility,) which can be derived from shopping experience, time demand, quantity purchased and relative price. McCorkle and Reardon (2002) explain that capital constraints such as limited access to transportation or internet can be decisive factors in consumers' channel choice.

3.1.3 The online channel

Brown et al. (2003) argue that too many researchers focus on the aspect of convenience when discussing the Internet as a purchase channel. In their study they examine the various shopper orientations and suggest that not only consumers that are sensitive to the aspect of convenience shop online, but that consumers with different shopper orientations shop online. The results of their survey confirm the previous hypothesis identifying 7 clusters with a specific shopper orientation. The results further show that the two most predominant shopper orientations of online shopping are the recreational shopper (enjoyment of shopping) and the economic shopper (price sensitive). It is quite surprising that *the convenience shopper* is only the sixth most dominating shopper online. Brown et al. (2003) argue that it is possible to divide consumers into heterogeneous groups according to shopper orientation but that there is not a specific shopper orientation that matches the internet channel as such. However, Brown et al. (2003) claim that while shopping orientation does not necessarily translate into purchase intention, other parts of their survey suggested that product type and prior online purchases can have an effect on shopping intention. This is consistent with other researchers that over time have discussed that product assortment or product type can have potential impact on the channel choice (Balasubramanian, 1998, Bearden, 1977, Stephenson, 1969). Brown et al. (2003) suggest that marketers should take on a more holistic approach to gain consumers' interest and by incorporating marketing strategies that can attract the different shopper orientations and not just focus on those adhering to convenience. Lastly, they argue that their findings show that the internet channel is not much different from non-physical channels and that the segments are no different either.

Hansen (2006) argues that product assortment can be an attribute of channel choice and further that extra spare time is not considered a benefit of online shopping. In his study he stresses the need for more research of attributes regarding repeated online food shopping. He argues that the need arises due to prior research that indicates companies have a hard time gaining profits on online food channels. Further, Hansen (2006) claim that one third of online food shoppers discontinue food shopping in the online channels. Since other product categories within apparel, books and games have had a substantial success in online channels, it becomes difficult to understand why online food channels struggle so hard (Hansen, 2006).

Hansen (2006) proposes that innovations and new technology can be difficult for consumers to adopt, especially emphasizing perceived complexity, relative advantage, compatibility, transaction costs and perceived risk. He suggests that consumers hesitate to buy food online because of complex environments. Thus, retailers should develop websites that are easy for consumers to navigate in. Additionally, his survey revealed that perceived risk was only a direct concern for those inexperienced with online shopping. In this case Hansen (2006) stresses the importance of "risk relievers" and making the consumer feel safe as important determinants when choosing FDCs. When discussing relative advantage, Hansen's (2006) study indicates that online shopping provides benefits in terms of lowering the physical effort and further that the enjoyment of online shopping is not perceived to be as interesting as offline shopping, across those consumers who did repeat purchase. Here Hansen (2006) stresses the need for more hedonic environments and emphasizes that marketers should promote the less physical effort of online shopping. Furthermore, Hansen's (2006) result suggest that time pressure or more available time is not considered a benefit of internet shopping. Thus, Hansen's (2006) study support Brown et al.'s (2003) study, which also conclude that convenience is not the dominating determinant of online shopping. Especially, the complexity of channel usage is interesting as this is not a determinant observed before, which indicates that as channels evolve and change new determinants emerge.

3.1.4 Multi-channels

Gehrt and Yan (2004) investigate situational factors in the multi-channels and discuss the impact of situational factors on channel choice. In their study they explain that the most predominant situational factors in prior research are task definition and temporal issues. They argue that these situational factors have a high impact on channel choice and that especially temporal issues were influential. Their research indicates that when consumers have much time available they prefer offline channels but when they have little time they prefer online channels. Thus, temporal issues are highly relevant and can determine channel choice. Furthermore, their result indicated that time availability has an impact on the desired channel attributes (Gehrt and Yan, 2004). Their study indicates that consumers with plenty of time had high preference for the shopping experience as well as availability of the right brands. However, when consumers were in lack of time, quick transactions and check out services were preferred over other attributes.

Pan and Zinkhan (2005) tested 16 channel determinants discovered in earlier research in order to understand which determinants are most important in channel choice. They divided the channel determinants into three categories, which are; product relevant factors, market relevant factors and personal factors.

Pan and Zinkhan (2005) examined the 16 determinants according to the influence on channel choice and the influence on shopping frequency. Their results showed that the two categories; product relevant factors and market relevant factors were determinants of store choice and that personal factors were predictors of shopping frequency.

Pan and Zinkhan (2005) propose that the most important determinants of channel choice was product assortment, service, quality, store atmosphere, low price levels, convenient location, fast check out, convenient opening hours, friendliness of sales people, and convenient parking facilities. Further, they claim that the determinants are listed according to their importance, which essentially means that product assortment is the most important attribute in their study. Furthermore, Pan and Zinkhan (2005) discover a difference in the most important attributes between offline and online stores. Where the location, parking and check speed are highly important in offline channels, quality and product assortment are found to be most decisive in online channels. Lastly, Pan and Zinkhan (2005) argue that consumers may attach different importance depending on channel format and that marketers must develop marketing strategies by understanding the many factors that influence consumers choice behavior.

3.2 Theoretical framework

In this section we present the theoretical framework that will be applied in the discussion later in the study. The framework was extracted from the theory in the literature review within consumers' channel choice and channel attributes. The theoretical framework will ultimately help facilitate the discussion later in the study and the answering research question.

3.2.1 Building the theoretical framework

As explained in the beginning of this chapter (section 3.1), consumers are influenced by situational factors, personal factors along with their preference for channel attributes.

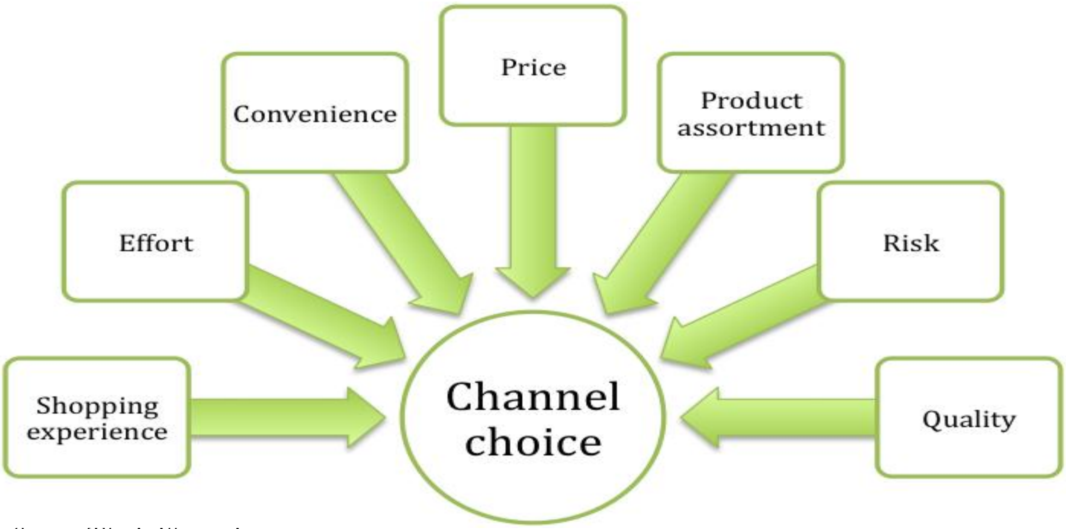
These three factors; Situational, personal, and channel attributes were identified in the research examined in the literature review, where also many channel determinants were discovered. As already explained, the situational factors and personal factors depend on situation or personality and cannot be manipulated by marketers (Gehrt and Yan, 2004). However, the channel attributes can be manipulated by the marketers of a channel, as they can change prices, interior, product assortment etc. It is the channel attributes that consumers evaluate in the antecedent stage, which marketers can manipulate, that we wish to extract in the theoretical framework and test later in the discussion. Therefore, we only test the channel determinants that can be allocated as channel attributes. Thus, channel determinants allocated to situational factors and personal factors are not accounted for in this study and are consequently not considered for the theoretical framework.

In total, 12 determinants were discovered (appendix 8). Seven channel determinants; *Effort, Convenience, product assortment, price, quality, risk and the shopping experience* were allocated to channel attributes since marketers of a channels can control and manipulate these determinants. The channel determinants are from now on referred to as channel attributes. The channel attributes were chosen based on that two or more researchers in the review had identified them as decisive in relation to channel choice.

3.2.2 Illustration of the Criteria set and Channel attributes

The illustration below is the theoretical framework. The theoretical framework consists of seven channel attributes, which the researchers in the review have identified as decisive in consumers choice of channels. It is important to understand if these attributes are applicable in 2020 because marketers of FDCs apply these attributes in marketing campaigns and strategies in order to attract consumers. The seven channel attributes below will be tested in the discussion with the findings from the empirical analysis. The seven attributes are elaborated in appendix 9.

Figure 3.2, Theoretical framework



Source: Thesis illustration

4.0 EMPIRICAL ANALYSIS

The purpose of the empirical analysis is to create a trustworthy picture of which trends predominantly can influence families of the upper middle class in 2020. Consecutively, the findings from the empirical analysis must enable us to evaluate which channel attributes will be significant to the segment when choosing FDCs. To conduct the empirical analysis we evaluate the speed and direction of the six trends and how they are interrelated. Further, we assess how certain the trends are and how high impact the trends have on the segment's choice of FDCs. Based on the trends with highest certainty and impact, and the evaluations and findings in the empirical analysis we create a future scenario. The scenario will describe how the trends can influence the segment when choosing FDCs, and will further work as a conclusion of the Empirical Analysis. In turn, the scenario enables us to form the theoretical discussion, where we argue which channel attributes are significant to the segment in 2020.

4.1 Evaluation: Speed and Direction of Trends

In the following section we describe and evaluate the velocity of the six giga trends identified by the experts. This is to create a picture of how the trends can unfold in 2020 and thereby to create a consistent and trustworthy scenario of the future. As explained in the method chapter (2) we use the descriptions of trends revealed from Interview 1 and 2 together with the desk research.

Each of the trends is evaluated in separate sections where it is first shortly defined according to the experts' descriptions, views, and arguments. Hereafter, the trend is evaluated in relation to the speed and direction of its development.

4.1.1 Automatization

The characteristics of Automatization are described below in figure 4.1. As previously described the experts identified E- and M-commerce as being one trend. In this evaluation we choose separate the trend in two as the E- and M-commerce develop differently.

Figure 4.1, Characteristics of Automatization

<table>
<tr><td colspan="2">The physical and the digital world fuse in the way that there is a digital presence in the store environments. For instance when shopping for food in a physical channel one can scan groceries with e.g. a smartphone, pay with the phone and check out of the store with the phone. Thus, there is no need for shop assistants neither self-service machines, which results in consumers serve themselves. In other words; one is also present in an automated digital sphere when being in the supermarket doing grocery shopping. Mega trends that are connected to Automatization are elaborated below.</td></tr>
<tr><td>E-commerce</td><td>E-commerce means that consumers buy their food online. It can be present in physical distribution channels that also have an online grocery shop as well as distribution channels that only exist online.</td></tr>
</table>

M-commerce	Consumers buy their food through different smart phone applications that are connected to an online food distribution channel. Thereby food can be ordered everywhere at any time.
Home Management System	Home Management Systems are defined as intelligent solutions that help the household to keep track of its groceries. It is a system that regularly checks the household's food storage, and automatically orders new food. More specifically, consumers' shopping patterns are registered in a system that makes it able to calculate what and when to buy. Such systems can also be present in mobile applications, intelligent fridges or other digital solutions.
Self-service	Consumers have the opportunity to service themselves at self-scanning machines. Such are already installed in some Danish supermarkets. Self-service can also be exemplified when consumers buy online, e.g. flight tickets, hotels and clothes.

Source: Thesis Illustration, expert interviews 1 and 2

Internet and E-commerce

Danish household have experienced high internet penetration from 10% in 1998 (Instituttet for Fremtidsforskning, 1998), to 54% in 2000 (Statistics Denmark: Aastrup et al., 2010) and 87% in 2010 (Danmarks Statistik, 2010). Data from Danmarks Statistik [Statistics Denmark] indicate that there is no direct relation between the income level and the penetration of the Internet. However, when it became financially and technically possible to install an Internet connection in private households in the 1990s the development of households that installed Internet was explosive and hereafter more slowly increasing.

From table 4.1 and 4.2 we can see that there is a strong relation between income level and goods purchased online: The higher income, the more goods consumers purchase online. This is the case for the upper-middle class with an income of 230.000 to 400.000 kr. Additionally, the younger segments generally adapt and acquire new technologies faster than the elder segments. The younger part of our defined segment (today 12-32 years old) grew up with internet and mobile phones. Hence, the share of upper-middle class families using Internet is higher than average (Danmarks Statistik, 2011).

Table 4.1, Percentage of the Danish population that have bought goods online within the last 3 months

Year	2008	2009	2010	2011
Income: 50.000-99.999 kr.	44	42	54	59
Income: 100.000-199.999 kr.	41	46	43	52
Income: 200.000-299.999 kr.	48	50	51	60
Income: 300.000 kr. and above	54	62	65	65

Source: dst.dk, 2012

Table 4.2, Percentage of Danes that has never made a purchase online

Year	2008	2009	2010	2011
Income: 0-49.999 kr.	30	27	21	24
Income: 50.000-99.999 kr.	39	41	27	22
Income t: 100.000-199.999 kr.	44	37	40	30
Income: 200.000-299.999 kr.	37	30	26	21
Income: 300.000 and above	27	17	16	17

Source: dst.dk, 2012

In Denmark, E-commerce has increased by 25% in both 2009 and 2010, and by 15% in 2011 measured on payments with Danish Credit Card or Visa. FDIH (Institut for Distance og E-handel: channelworld.dk, 2011) assess that 50% of the Danes' consumption will be mediated through online channels in 2020. Today, the Danes especially shop for clothes and shoes online, which consisted of 10% of the total online purchases in 2010. In contrast only 2% percent of online purchases were groceries (Epinion for FDIH, 2010), which increased to 5% in 2011 (Expert, interview 1). This is a high growth, and if this tendency continues a high share of the Danes will buy food online in 2020. In addition, 10% of the Danes purchased groceries online in 2010 (Danmarks Statistik, 2011). Even though there is a high growth of food purchases online, the share of online food purchases is small.

According to Aastrup et al. (2010) and several experts from the interviews this tendency is reasoned from the fact that the major food retailers, Dansk Supermarked and Coop, have been deliberated in developing the right online solutions for the consumers. In this respect one expert says:

> "You can say, if you look at the Danish market – there have been attempts to make E-commerce solutions for groceries, but none of them have broken through really (…). It is a question about finding the right solution and for the retailers to create a model that they can gain profits from, and then it will come" (Expert, interview 1. Own translation)

The slow development in online grocery commerce is not caused by the consumers not wanting to purchase groceries online as much as the retailers' lack of good online solutions. This view is supported by Rina Hansen, E-commerce expert at Retail Institute Scandinavia, in a statement to HK Danmark:

> "Denmark is way behind compared to other countries. But it will come. The Danes expect it, and the customers surely are ready. It is the supermarkets and their old-fashioned structure. That is what holds it back. (…) They don't know how to mix frozen food, books

and vegetables and deliver at a low price (…), but I'm sure that it is on its way" (hk.dk, October, 2011. Own translation)

These quotes emphasize that the trend of Automatization is partly driven by consumers' demand for online grocery shopping more than the retailers' pushing the trend. However, the development within this area is increasing and there are in fact some online grocery retailers such as nemli.com and coop.dk, and according to one expert (interview 1) 31% of the consumers expect to buy more groceries in the future.

In sum, the findings on E-commerce show an increasing tendency where consumers are willing to buy groceries online more often in 2020 compared to today. The development can be expected to increase in a rapid speed and we thus expect online food shopping to count for significantly larger markets shares in 2020 than today. However, if this is to come true, it will be up to retailers to develop favorable online grocery business models and -consumer solutions to support this trend.

Mobile phones and M-commerce

The tendency is the same as with the penetration of Internet when assessing the share of the Danish population that owns a mobile phone:

Table 4.3, Households' ownership of mobile phones

Year	**1996**	**1998**	**2000**	**2002**	**2003**	**2004**	**2005**	**2006**
Percentage of Danish households	38	49	68	83	85	90	92	94

Source: dst.dk, 2006 [Electronic Devices in households 1999-2006]

Even though smartphones have been available for consumers in 8-9 years (Expert, interview 1) it is only during the last few years the penetration of smartphones for private persons has been immense. Data from the institutes Userneeds and Dwarf indicate that in the first quarter of 2011 33% of the Danes owned a smartphone while in the first quarter of 2012 this number has increased to 51% (Dwarf, 2011. Dwarf.dk, 2012). They expect to it to rise to 80% in 2013.

When it comes to M-commerce, 2% of the Danes paid for products or services using their smartphone in 2009. This increased to more than 10% in 2010 (dst.dk, 2010: mobilbetaling), 21% in 2011, and expected 33% in 2012 (Dwarf, 2011. Dwarf.dk, 2012). Especially, M-commerce is popular in Danish families with children where 26% make a purchase with their phones every month. Among young Danes below 25 years 22% have used a phone as a mean of purchase (Epinion for FDIH, 2012). There are also examples of food take away companies that have made successful attempts to increase M-commerce, such as Room Service. In 2009 0,5% of their turnover came from M-commerce, and in 2011 this number increased to 12% (Freeway.dk, 2012). These numbers indicate that there is a strong tendency towards M-commerce that develops even faster than E-commerce. This view is supported by two experts (Interview 1). They describe that the physical and the digital world will fuse, and that M-commerce will increase in market share (measured on payment methods) noticeable. We therefore expect M-commerce will have a strong influence on consumers' choice of FDCs in 2020.

Home Management System and Self-service

The latest technologies in Denmark within the area of Automatization are smartphone applications and QR-codes. QR-codes work as barcodes and can be scanned with a phone's camera. When the code is scanned it will automatically direct the user to a homepage or application. Many food products and food advertising brochures already contain QR-codes. Denmark's largest food retailer Coop has for instance QR-codes on their milk cartons that inform about exactly which farm the milk is from, when it was pasteurized, packed and driven to Coop's central stock.

45% of the Danes that own a smartphone have already used QR-codes once or several times (tryksag.dk, 2012). However, since the QR-code is relatively new in Denmark not much data exist on the development in this area. One expert explains how the development will develop towards 2020:

> "We can use smartphones to scan products in the supermarkets or scan packing at home and in this way re-order products that are send home or to a central pick-up station. Today Tesco gives their customers the opportunity to scan pictures of food products in the Metro or at the bus stop, and thereby order food to pick up at the end of the day." (Interview 1. Own translation)

Several experts take on the same view and a strong tendency is emerging of systems that make consumers able to order food wherever they are plus the food can be ordered automatically. Another expert also assess the future development:

> "With 2020 in time horizon I certainly believe that much can happen within 8 years, so it might be that some people begin to use [home management systems] within this time horizon" (Expert, interview 1. Own translation)

We see inclinations that the physical and digital spheres will increasingly merge towards 2020 and that these inclinations increase fast. The statements indicate that development in the food retail industry points to a high degree of self-service and Automatization in food purchase situations, which highly affect consumers' choice of FDCs and the way consumers buy their food products.

Summary of tendencies

To sum up the reviewed reports, data, and statements indicate strong tendencies towards that Automatization will be highly developed in 2020. Compared to the small share of Danes that buy food online today, remarkable larger shares in our segment can be expected to buy food online in 2020 either from their computers or smartphones. Moreover, there is an inclination that the process of buying food will be more automated; that is, using smartphones or other applications that can work as tools to manage the supply of food in the Danish households. The trend can be expected to be pulled by the consumers. Consumers' demand for automated solutions when buying food is increasing while retailers lack in developing the right solutions and comply with the demand.

4.1.2 Polarization of Price and Quality

Polarization of Price and Quality is characterized as the following mega trends in figure 4.2.

Figure 4.2, Characteristics of Polarization of Price and Quality

Instead of buying food either in discount channels, middle-end or high-end priced channels, consumers buy food in both discount and high-end. This implies that the upper-middle class has preferences for buying products as cheap as possible in discount channels while still buying some products that are more important to them in high-end channels.

Source: Thesis Illustration, expert interviews 1 and 2

In the past, before the current trend of Polarization of Price and Quality began 10 years ago (Expert, interview 1), the Danish consumers went to either high-end stores, middle-end *or* discount channels (Retail Institute Scandinavia in Aastrup et al., 2010. Experts, interview 1). Since the early 90s this trend has changed into another form of polarization, namely that consumers shop in *both* discount and high-end channels, and decreasingly in middle-end channels. In this regard, consumers have different motives for buying discount and high-end. For some consumers health is decisive, and for some animal welfare is decisive. The Danes for instances demand both discount food products such as pork, where the pigs are "produced" at so-called "factory-farms" with bad living circumstances and where price is the main concern, while other consumers demand organic pork, where e.g. living conditions is a concern (Kruse, Scenario 2012). Hence, the trend is driven by a polarization of food production that is reflected in the polarization between discount and high-end food grocery retailers. This is expected to accelerate towards 2020 (Kruse, Scenario 2012). This is also explicitly stated by several of the experts (interview 1 and 2). One of the experts explains:

> "Earlier we saw that people bought organic, was very green and went to Irma (high-end supermarket) and not Netto (discount supermarket). Today we have what we call high and low interest consumption, which means that you will spend money in Irma on the products you think are important, and then you go to Netto and buy the rest of the products. We don't have the same polarization as previously." (Interview 1. Own translation)

More experts, both in our study and other experts believe that this trend will increase towards 2020. For instance, Lars Esbjerg, expert in retail management and consumer behavior from Århus University, has stated to FoodCulture.dk:

> "It is evident that discount is here to stay and has become a lasting part of most Danes' shopping habits. They [discount supermarkets] are often placed close to work or home, have most of the products consumers need daily, and are perceived as cheap and convenient places to shop" (January, 2012. Own translation)

Statistics point to the same tendency. In 1993 the discount food retailers had a market share of 17% (Dansk Dagligvarehandel to FoodCulture.dk, Feb 2012). Today 35% of the market share of the Danish food retail market is derived from discount supermarkets. If this tendency continues the number will increase to 50% in 2020 (Expert, interview 1). Today, 47% of the total number of supermarkets is discount retailers. According to Retail Institute Scandinavia (Knudsen, 2012) this number will increase to 55% in 2015.

Two experts (Interview 1) clarify that the increasing discount tendency can also be connected to pressures from the macro environment. That is: food prices increases on the global market, there is an increased world population and we are facing a continuing European economic downturn. Hence, food takes higher shares of available income, which in turn results in sensitive buying behavior (Expert, interview 1). These factors support the tendency that consumers will seek the cheapest channels when buying their low interest food and towards increasing market shares to the discount retailers.

Summary of the tendencies

Due to pressures from the macro environment and the polarization in production of food we assess that trend continues in speed and to be highly present in 2020. Consumers are expected to buy most of their food supply in discount channels, however some products that are more important to the consumers, such as specialties, they will buy in high-end channels. Hence, we expect that Denmark will experience a decreasing market for middle-retailers, who can expect to lose large market shares. In 2020 more than half of the market share and number of stores is assumed to be hold by discount retailers.

4.1.3 A Search for Authenticity

The characteristics of A Search For Authenticity can be read in figure 4.3.

Figure 4.3, Characteristics of A Search for Authenticity

A Search for Authenticity is characterized by that consumers have preferences the authentic; that is, the original, the unprocessed, the local and the traditional. In relation to FDCs the trend implies that consumers make purchases or prefer FDCs that they perceive as authentic. The three mega trends that are connected to the trend are highlighted underneath.	
The Local Trend	The Upper-middle class favor authentic purchases and niche food stores, local Danish food, local raw food, own harvest and specialties.
Food with a (hi)story	The upper-middle class search for the (hi)story of food: where the product is produced, packaged and when and how it was transported to the supermarket. Consumers like "natural" food, which they like to hear stories about and that appear authentic to them.
Self-branding	Even though the people of the upper middle class experience that they are in lack of time and cook less they will try to compensate and try to master le haut cuisine when they cook in the weekend.

Source: Thesis illustration, interview 1

Before the economic downturn came about in Denmark in 2008 the Danes' consumption patterns were influenced by overconsumption and materialism (Expert, interview 1). The Danes' mindsets were occupied by the term "nice-to-have", where the upper-middle class' consumption was characterized by e.g. the favoritism of expensive brands and exclusivity. This can be defined as a form of self representation; that is, consumers bought products that they did not necessarily need but bought products as means self-branding, which in turn can be characterized as overconsumption (Experts, interview 1).

After the economic crisis made its entry in 2008 the mindset of nice-to-have has shifted to need-to-have, hence the way the trend of authenticity is present today can be assumed to be driven by the economic downturn in Denmark. One of the experts gives an explanation of this shift and enlightens that *"In times of crisis people often turn inwards and seek safety and closeness"* (Interview 1. Own translation). Another expert continues, "*It could be a search for authenticity, or a response to the growing uncertainty that has come with the global financial crisis – seeking the comfort and safety of the kitchens of our grandmothers*" (Expert, interview 1). In this respect, there has also been a shift in the way the upper-middle class represent themselves. Today, consumption is, to a large extent, based on what we can in terms of knowledge and abilities, and not on high material consumption. These aspects are then reflected in the trend of authenticity as one of the experts explains it "*Local food, local raw materials, own harvest etc. are well suited in a spirit of times, where crisis is dominating and it is about the nostalgic, modest and familiarity*"(interview 1. Own translation). Consumers seek the authentic shopping experience, hence they take pleasure in distribution channels such as niche stores with specialized products, products that are locally produced, products with (hi)story that emerge authentic to them, and they appreciate to cook themselves when time allows them to (Experts, interview 1).

According to the experts, the trend of authenticity cannot be expected to keep a steady speed until 2020. One expert states that authenticity will only increase in the next 4-5 years (Interview 1), meaning that we can expect the trend will still influence consumers in 2020, but not necessarily more than today. Another expert (Expert, interview 1) supports this view that it may not increase in speed, and explains that the price of food products can have a higher influence in 2020, as authentic products from specialized distribution channels with a good (hi)story often are more expensive than ordinary products. Additionally, a third expert clarify that "*authenticity only attracts a small segment and a small amount of actual buying processes*" (Interview 2), and thereby authenticity does not attract the majority of the upper-middle class in 2020. In other words, since A Search for Authenticity only attracts small segments and only consists of a small share of the products families of the upper-middle class buy, the trend is not highly influential on the segment.

Also one of the experts highlight that one must we consider that especially this trend can influence our segment differently. The upper-middle class consumers now aged 12-16 can be thought to "rebel" against the food they were served growing up (Expert, interview 1), when they move away from home in approximately 2020. On the other hand, the consumers that are 32 years old today have comparatively set eating habits and may not change these habits radically (Expert, interview 1). Accordingly, another expert also expresses that it can be assumed that the trend of authenticity will mainly be present among the elder consumers in our segment – the younger segment grew up in a globalized and international environment, where pizza or curries have similar authenticity to them than local food and locally produced food (Expert, interview 2).

Summary of the tendencies

A Search for Authenticity is today affected by the economic crisis in Denmark, where consumers seek inwards, seek comfort and safety. From the experts' views we assess the trend will only increase the next few years, and thereafter not increase in speed. Additionally, the trend will only influence minor parts of the upper-middle class in 2020. Therefore, we expect that A Search for Authenticity will be present in 2020. However, the speed of the trend will slow down, and have minor impact on the segment in 2020.

4.1.4 Ethical and Sustainable Awareness

The trend of Ethical and Sustainable Awareness can be characterized according the following definitions in figure 4.4.

Figure 4.4, Characteristics of Ethical and Sustainable Awareness

Products are produced under good working circumstances for the laborer, human rights are observed and products are produced in a sustainable way that harms the environment as little as possible. The trend also concerns that there will be transparent labels on food products that inform consumers about food's impact on the environment. In other words, the upper-middle class takes responsibility for each other and for sustainability for future generations. Along with the giga trend comes two mega trends, which are highlighted beneath.	
Food miles	"Food miles" is a term which refers to the distance between the place the food is produced and the place where it reaches the consumer. Food miles are one factor used when assessing the environmental impact of food, including the impact on global warming.
Less is more	Food must be produced with a concern to the environment

Source: Thesis illustration, interview 1

Ethical and Sustainable Awareness can be traced several decades back in the Danish history. In 1974 the environment became a political issue, and a new environmental law contributed to ecology, sustainable forms of living and "green accounts" where companies had to count for their influence on the environment. In the 1980s environmental issues were still a large topic for both politicians and the Danish consumers, however in the 90s the interest in sustainability decreased as many had the impression that there was now taken care of the environment after several years of focus on this area. Nevertheless, especially the industrialization in the Asian countries increased, which caused immense pollution issues. Not only the industry in the 3rd world countries was underdeveloped, the western countries also exported waste to the 3rd world countries. Hence, in the 00s more and more people became aware that this was not just an environmental crisis, but a climate crisis. Thus, there have also been increasing interests in laborers conditions and social responsibility. (designprocessen.dk, 2012).

Today, the trend of Ethical and Sustainable Awareness is highly present among the upper middle class, and is reflected in what products they choose to buy. The upper-middle class have become aware of the influence production of food has on the environment and are therefore concerned about how the food is produced in terms of labor conditions (Experts, interview 1). For instance, we can see from table 4.4

that the sales of organic food are still increasing. Accordingly, fair trade products have also experienced increasing sales (FDB, 2009) and such foods are expected to increase sales further towards 2020 (Experts, interview 1. FDB, 2009. Okologi.dk, 2012).

Table 4.4, Sales of ecological food products in Denmark

Year	2008	2009	2010	2011
Sale of ecological food products, DKK 1.000	4.628.805	4.892.755	5.097.526	5.464.421
Percentage increase compared to last year	28,5	5,7	4,2	7,20

Source: Danmarks Statistik, 2011: [Retail turnover of ecological foods]

More of the experts believe that the trend of behaving ethically and sustainably correct is so certain in 2020 that it is a "basic characteristic" all companies must have. The experts argue that consumers expect it, but they also expect the retailers and the links in the value chain to pay for it: One expert stresses, "*CSR, environmental concern and code of conduct is not a brand value in 2020 (…). It is required from all companies. It is only if you do not act sustainable or make use of child labour that you get attention – and that is negative attention*" (Expert, Interview 2. Own translation). Two other experts highlight:

> "Environmental concerns will be more important as the global middle class continues to expand. We will need to redesign value chains, retailers, food production etc. accordingly. The consumer will be part of this but will continue to push for companies to bear the majority of the costs" (Expert, Interview 2.), and another expert share this view, "[Sustainability and ethical awareness] will continuously be important for the Danish consumers, but I'm in doubt whether people will pay for it" (Expert, Interview 2. Own translation).

From this we can assume that there are conflicting factors determining and driving the speed and direction of the trend. On one hand consumers have high expectations and sustainability and ethical issues are important to them. On the other hand they are not willing to, or do want to pay for ethical and sustainable correct products, since these products naturally are more expensive. Thereby we appraise that the trend can be assumed to be present in 2020. However, how dominant the trend will be can be influenced by the interplay between the retailers and the links in their value chains, and consumers' willingness and ability to pay for the products.

Summary of the tendencies

The trend of Ethical and Sustainable Awareness can be expected to continue in speed and be of high importance to the segment in the year of 2020. However, the segment believes it is a matter of course that retailers act sustainably correct, and they expect the retailers to bear the costs. Hence, the dominance of the trend can be influenced by the interplay between consumers and retailers in terms of who should pay the costs of ethical and sustainable products.

4.1.5 Time and Convenience

Figure 4.5, Characteristics of Time and Convenience

Overall, families of the Danish upper-middle class, especially families with children, increasingly feel that they are in lack of time, which is one of the main drivers of the trend. They want to prioritize time together with their families and e.g. spend less time on shopping for groceries, cooking food and cleaning the house. Therefore the upper-middle class seeks solutions that make their everyday life easier and more convenient. Along with this giga trend come several mega trends that are identified by the experts, which are elaborated below.	
Semi-convenience	Up-market convenience (a la Mark & Spencer) will develop as the upper-middleclass increasingly will prioritize their spare time with the family – and some of them will not compromise on the quality of their food either. Therefore the upper-middle class will avoid traditional fast foods that are not healthy but look for more appropriate fast food solutions.
Home management System	The home management system is described in section 4.1. However when considering the trend in relation to the time/convenience trend it is described as a means of ordering food in a more convenient and timesaving way. The very same aspects are reflected in the smaller niche trend of integration of functions, which is characterized as e.g. book stores and laundries combined with cafes, thereby enabling the consumer to do more things at the same time.
Bundling	Bundling is an expression of convenience. Bundling is defined as a "package" of more products, services and information. This can for instance be a package of food that both contain food, beverages, and recipes. It can also be an online solution where the consumer gives in a personal profile for the family; that is what the family likes and dislikes, and what is important – e.g. healthy meals. From this profile the family can then have a weekly home-delivery containing all the food, beverages, recipes etc. that are needed on a weekly basis for the whole household. In short, bundling is a gathered convenient solution that makes the family able to save time.

Source: Thesis illustration, Expert interviews, round 1

Time has always been an important issue for Danish consumers (Experts, interview 1), and several services, products and solutions, e.g. dishwashers, washing machines, internet, mobile phones, ready-to-cook food, fast food etc., have been developed fully or partly as an attempt to make consumers' everyday life more convenient (Experts, interview 1). Although the rational thought here would be that consumers have more time today due to the continually increasing number of services, products, and solutions, consumers still perceive they are more busy and have less time (Sondagsavisen.dk, 2011). In other words, consumers' expectations to how many errands they can run increase. This is highlighted by one of the experts: "*This trend will still be there [in 2020] even though one can imagine that new technology, opportunities to work from home and more flexible ways of living (…) [time/convenience] is still decisive*" (Expert, Interview 1. Own translation). Therefore it can be discussed if many of these so-called convenient solutions that are supposed to make consumers' life less stressful can have a negative impact on time.

A study from Southern University of Denmark (Pedersen et. al: 2008) investigated this aspect by conducting a cross-sectional analysis with data from the "Dansk Data Arkiv [Danish Data Archive]" in which it was concluded that the use of mobile phones, internet and e-mail are factors that highly increase the Danes' busyness. Thomas Dalsgaard, Director of the consultancy in business psychology, Pluratua, explains that Danes' experienced busyness can be caused by that "*they are bounded by bank loans, expectations to material goods, own ambitions and unrealistic ideas about success and the good life. The fact that we place high demands is one of the large obstacles in order to be satisfied*" (kristeligt-dagblad.dk, 2010. Own translation). Jens Bonke, senior researcher at Rockwool Fond of Research further highlights, "*There is no doubt that there is an element in the collective consciousness that one must be busy and be able to make and do a lot, also in the spare time, whether you make it or not*" (Ibid. Own translation). Thus, it can be assumed that technological/automated solutions (such as mobile phones and internet) and our own and society's expectations and ambitions can be some of factors driving the time/convenience trend.

All the experts mentioning this trend are confident that the trend also will dominate families of the upper-middle class in 2020. Some of the experts clarify:

> "We are still increasingly busy and want to prioritize time with our families when we are off from work. Therefore, I believe that convenience continuously will be a trend in 2020" (Interview, round 1). Another expert explains, "Time/convenience is important, and it will still be so in 2020" (expert, interview 1)

As a matter of fact, no experts did not significantly emphasizing the importance of Time and Convenience in 2020. For that reason we assess that this trend will keep a steady speed towards 2020. The trend can also be argued to be even more present in our segment compared to the lower classes as both parents in the upper-middle class families most often both work and are career minded, and thereby have high expectations to themselves (Expert, interview, round 1).

Summary of the tendencies

The indications above emphasize that the use of internet, mobile phones and other devices and solutions make families of the upper-middle class feel busier. The segment has high ambitions and expectations to the amount of tasks they are able to execute, and that they feel a pressure to do it. The suggestions above further point at that the segment continuously will experience busyness, and that these dynamics will increase. Hence, we assess that the trend Time and Convenience will be highly present in 2020.

4.1.6 A Healthy Life

Figure 4.6, Characteristics of A Healthy Life

The upper-middle class will strive to eat and live healthy as long as researchers promise us a longer and better life – it is embedded in most consumers mind.	
Health realism	The upper-middle class becomes more realistic about health. They seek away from the idealized diets that are difficult to commit to and instead want diet advice that are possible to oblige and can be implemented easily. Most people know what is healthy and unhealthy, and they do not want to be dragged into unrealistic diets that will unleash bad conscious. Consumers will still look for diets that promise an easy way to health and a happy life. But at the same time they will not always follow them. Trying hard to be healthy without ever really getting there.
Healthy life	The optimal diet and more individual solutions will be part of life. Consumers increasingly want a long and healthy life and search customized diets helping them make the right choice.
Transparency	Consumers have become aware of processed foods. They want to know what they eat and believe that food with additives or e-numbers are processed and unhealthy.

Source: Thesis illustration, interview 1 and 2

The trend A Healthy Life is present in the Danish society and has over time (approx. the last 30 years) grown increasingly strong. The drivers behind the trend can be identified as the increasing research within the illness, health and wellbeing as well as the fact that we today live longer and longer (Expert, Interview 1).

The fast growing research in the past approx. 30 years, have provided strong results indicating that committing to A Healthy Life style (healthy eating, exercise, no smoking) enables people to not only prevent diseases but also to live longer. This has given the government incentive to support A Healthy Life and have been supported by legislation and taxation of unhealthy products such as products with high levels of fat and sugar, alcohol as well as harmful additives. In addition, the government along with the rest of EU has made smoking laws that prevent people from smoking in restaurants and indoor public areas. These initiatives have overtime convinced the Danish population that A Healthy Life is desirable.

Today many businesses and organizations have also seen the benefits of healthy employees and have begun to offer employees a number health checks and possibility to exercise to keep them healthy

(Teknologisk Insitut, 2005). The health trend is constantly present in the media, (news, talkshows, weightloss reality programs) reminding consumers about how to live the healthy life..

One of the experts (Interview 1) believes that trend is growing into a set of rules more than an actual trend. "*Being endorsed, or in some cases even created by policy makers adds to the perceived legitimacy of this trend, which ends up as a set of rules, more than an actual trend*"(Interview 1. Own translation). This indicates that the trend is not just a consumer or people trend but that the government also drives the trend.

Two researchers Birthe Lindal Jeppesen and Anne Marie Dahl, who study food in the future, argue that food has become a lifestyle phenomenon. They explain that food has become emotional and help consumers define them self and others. Thus it is popular to buy the right food because consumers thereby disclose that they are "healthy" or "aware of health". They further argue that consumers have become more quality oriented and that this trend especially concerns well educated women and families, hence also families if the upper middle class (Jeppesen and Dahl: Fødevareministeriet, 2012).

When exploring the direction of the trend it is obvious that it will not move in the opposite direction but will gain popularity. Moreover, health will still be present in media, in the public sphere and families of the upper-middle class' mind. Based on the characteristics provided by the experts (Interview 1 and 2) we believe that families of the upper-middle class will focus on improving their lifestyle in order to have a healthier life and live longer.

Other experts have the same opinion, Marianne Levinsen, researcher at Fremforsk, Center for Fremtidsforskning argues that Danish consumers will continue to search for a healthy lifestyle. She is convinced that consumers will try to personalize or customize their healthy lifestyle by getting advice form health experts (Fremforsk.dk, 2009). Customized diets have also been suggested by one of the experts (Interview 1) who argue that families of the upper-middle class will look for solutions that help them build customized diets and make healthy in a realistic way.

Today health operations for lifestyle diseases are paid by the system via tax. However, one expert considers that the health system will reduce coverage of lifestyle deceases. Discussion amongst the public of whether overweighed people should pay for one or two seats when flying with an aircraft or whether society should pay for peoples' self induced medical problems (etik.dk, 2011) have surfaced in newspapers, magazine and not least the Internet over the past years. These considerations could become a subject more heavily discussed in the future.

However, at what speed the trend will grow is difficult to determine. It seems that most of the experts believe it will still be very present, but the question is if the trend can continue in the same speed as previously. Based on this we evaluate that the health trend is slowing down, it will still grow but not with the same speed we have witnessed in the past decade or 15 years where it has experienced a massive growth and have reached nearly all parts of society. It will remain strongly present in society but develop more slowly.

Summary of the tendencies

It is evaluated that the health trend will still be a giga trend in 2020 and will continue to move in the same direction and will be more important to the families in the upper-middle class. However, we assess that the trend will slow down and not develop at same speed we have experienced over the past 15 years. The trend will continue to influence families of the upper-middle class' daily lives where people increasingly will try to find way of how to lead A Healthy Life. Moreover, consumers will try to get advice on customized diets. Because consumers are increasingly aware of what is healthy and what is not, consumers will expect other people to take responsibility for their own actions. This will lead to an intensified debate about whether the health care system should support and solve peoples' self inflicted medical problems.

4.2 Evaluation: Interrelations

In this chapter we evaluate the interrelations between the six giga trends identified by the experts. This is important in order to know how the trends influence each other in the future, and thereby to create a coherent and credible future scenario and theoretical discussion. We evaluate interrelations by applying the findings from the previous chapter (Evaluation of speed and direction). Hence, the findings from this chapter are based on the two rounds of Delphi interviews and the desk research.

The scale in table 4.5 is applied to evaluate the interrelations between the trends. By applying these ratings we can evaluate which trends are the strongest drivers and which are most dependent.

Table 4.5, Evaluation scale – interrelations between trends

-3 = negative impact – can decrease the speed of a trend significantly and/or can turn the direction of a trend
-2 = negative impact – can decrease the speed of a trend
-1 = negative impact – is not strong enough to affect the speed and direction of a trend
0 = No impact
1 = positive impact – is not strong enough to affect the speed and direction of a trend
2 = positive impact – can increase the speed of a trend
3 = positive impact – can increase the speed of a trend significantly

Source: Inspiration from Bandhold and Lindgren, 2008

In the table beneath it is highlighted which trends are interrelated, which trends are the strongest drivers and which are most dependent. In the following we evaluate and argue for the ratings shown in the table.

Figure 4.7, Cross Impact Matrix - interrelations

Trend/variable	Automatization	Polarization	Ethical/Sustainable awareness	A Search for Authenticity	Time/ Convenience	Health	**Driver**
Automatization		0	1	1	2	1	**5**
Polarization	0		0	0	0	0	**0**
Ethical/ Sustainable awareness	0	2		0	0	0	**2**
A Search for Authenticity	0	0	1		-1	0	**2**
Time/ Convenience	3	0	0	-3		-2	**8**
A healthy life	0	1	2	0	-1		**4**
Dependent	**3**	**3**	**3**	**4**	**4**	**3**	

Source: Inspiration from Pillkahn, 2008: 204

4.2.1 Automatization's impact

Currently we do not see any signs that Automatization has any impact on the *Polarization of Price and Quality*. The fact that the upper-middle class uses Internet, e-commerce, smart phones and m-commerce has no influence on the fact that people both shop in discount and high-end channels. However, in a distant future one can imagine that an online distribution channel gathers both discount and high-end food in *one* online channel, which could have a negative effect on the polarization we see today and in 2020. This can be compared to the fashion distribution channel Asos.com that both sells discount fashion brands and high-end brands. Nevertheless, as we discussed (4.1) the development of Automatization within the Danish food retail market has only slowly increased in speed. Even though we assess that this speed will increase during the next years the Danish retailers must first develop successful online business models that satisfies the Danish consumers' needs in order to develop a much more complex business model. Therefore, we assess that Automatization does not have a significant impact that can increase or decrease the speed, nor turn the direction of Polarization of

Price and Quality. Hence we assess that Automatization does not drive Polarization of Price and Quality.

Automatization does not have a direct influence on *Ethical and Sustainable Awareness* and *A Search For Authenticity*. On the other hand, Automatization increases the opportunity to provide consumers with information and (hi)stories on ethical, sustainable and authentic issues. More specifically, if consumers increasingly are in a digital sphere, where information can be obtained whenever and wherever people are, marketers can reach consumers with ads and messages more easily. As we discussed (4.1) an example of this is the use of QR-codes or other automated solutions that make consumers able to receive more information about a product if they scan the code. Hence, Automatization can increase the awareness of the trend; however Automatization is not strong enough to drive the trend forward alone. In other words, Automatization is not the reason why Danish consumers have interest in an ethical and sustainable lifestyle. Consequently, Automatization's impact on Ethical and Sustainable Awareness and A Search for Authenticity is assessed to be low, which is why they are rated with 1.

As we argued in section 4.1 the trend of Automatization provides people with the opportunity to run errands faster, more errands at the same time, and enable a more flexible lifestyle. Thus, Automatization saves consumers *time*, and make life more *convenient*. On the other hand, as stated in section 4.1 Automatization can also be a reason why consumers feel they are busier, which can have a negative effect on consumers' time issues. Thus, in step with the fact that Automatization provides consumers with more time, it also affects that consumers have more time to run more errands. In turn, consumers take advantage of this time, and run even more errands, which then can cause that they feel they have less time. More specifically, it becomes a circle where Automatization and time are demanded continuously. Accordingly, the Automatization has a high impact Time and Convenience and is given the rate 2. The reason why it is not rated with 3 is that the trend of time/convenience drives Automatization more than Automatization drives time/convenience, which is elaborated in section 4.2.5.

In the same way as Automatization has a positive impact on the information flow of ethical and sustainable issues and authentic (hi)stories, Automatization can also ease the flow of information about *A Healthy Life*. Nevertheless, as Automatization provides consumers with more time, it is also possible that Automatization allows people to exercise more. An analysis carried out by Søndagsavisen [The Sunday Newspaper] shows that there are positive relations between time and exercise – the more time the Danes have the more they exercise (sondagsavisen.dk, 2011). Still, the Automatization has an indirect impact, and does drive the health trend. Therefore, we assess the impact is 1.

4.2.2 Polarization of Price and Quality's impact

We do not assess that a high degree of Polarization of Price and Quality in 2020 has an impact on *Ethical and Sustainable Awareness, A Search for Authenticity* and *A Healthy Life*. This is due to the reason that Polarization of Price and Quality does not drive the trends. In contrast, these trends drive Polarization of Price and Quality, which is explained in the following sections. Additionally, Polarization of Price and Quality does not drive the fact that families in the upper-middle class perceive that they are in lack of *Time* and favor *Convenient* solutions. In the same way the trend does not increase or decrease the development of *Automatization*, and therefore we assess that Polarization of Price and Quality does not have any impact on these trends either. In sum, Polarization of Price and Quality is not characterized as a trend having a high impact on other trends, but is more likely a trend driven by other trends.

4.2.3 A Search for Authenticity's impact

A Search for Authenticity's impact on the trend of *Automatization* can be evaluated in two contradictorily ways. On one hand it can have a negative effect as some consumers might perceive that e-commerce and m-commerce do not provide them with an authentic shopping experience as there is no physical contact. On the other hand some consumers might believe the authentic experience can be obtained by using online niche channels with specialized products such as Aarstiderne.dk [seasons.dk]. Moreover, several Danish online stores such as gottohaveit.dk send a personal greeting with a handwritten postcard, which is another example of how the authentic shopping experience can be obtained from online channels. Additionally, most consumers in our segment grew up with online shopping, and for them online shopping can be just or nearly as authentic as physical shopping. Therefore, we assess that authenticity's impact on Automatization today is present; however in 2020 it will not have a major impact on our segment, which is why we rate it with 0.

If the upper-middle class favors authentic food products or channels A Search for Authenticity can have an impact on *Polarization of Price and Quality*. That is, products or channels with a good (hi)story, such as farmhouse sales and specialized internet boutiques are often more authentic (Expert, interview, round 1). Thus, A Search for Authenticity enhances polarization between discount and high-end, more specifically, that we shop both places. Thereby, A Search for Authenticity is one of the drivers of Polarization of Price and Quality. However, since A Search for Authenticity's presence is evaluated only to dominant families of the upper-middle class to a smaller extent we evaluate that A Search for

Authenticity cannot change or increase the speed of Polarization of Price and Quality significantly; for that reason it is rated with 1.

We assess that A Search for Authenticity has a positive impact on *Ethical/Sustainable Awareness* as some fair trade and ecological food products can be perceived authentic. For instance, a story about a coffee-farmer who offers good working circumstances for his workers while producing sustainable coffee beans for 20 years can be perceived as an authentic (hi)story. Moreover, one can also imagine that families searching for authenticity also will choose products that are less commercialized, for instance choose a milk from a small local Danish farm than choosing a milk from Arla, Denmark's largest dairy manufacturer (arlafoods.dk, 2012). For this reason we assess that A Search for Authenticity can drive Ethical/Sustainable Awareness. However, since A Search for Authenticity is not evaluated to be highly influential in 2020 the trend can neither be expected to enhance Ethical/Sustainable Awareness significantly. Therefore we rate the impact with 1.

A Search for Authenticity can have a minor negative impact on the trend of *time/convenience*. One of the aspects of authenticity is that families of the upper-middle try to "master le haut cuisine" when they cook in the weekend (Expert, interview, round 1). This requires time and is not convenient. Nevertheless, this niche trend has very little influence, especially when considering the strength of time/convenience. Hence, we evaluate that the trend has no influence on time/convenience. The same is present when evaluating A Search for Authenticity's impact on health, where we do not see any connection as people do not become healthier or health aware by searching for authenticity.

4.2.4 Ethical and Sustainable Awareness' impact

Consumers' awareness of ethical and sustainable issues has not increased or decreased in step with the assessment that Automatization is increasingly developed towards 2020. Therefore, ethical awareness does not have an impact on the direction and speed of the trend of *Automatization*. Ethical/Sustainable Awareness has some common denominators with *A Search for Authenticity*. When consumers are sustainable aware some consumers might focus on e.g. food miles and thereby choose distribution channels close to their home or choose products that are locally produced in order to cut down the food (transportation) miles. However, the motive to choose a local distribution channel or local food (which can be perceived as more authentic) is different from the motive when consumers' buy from an authentic channel or authentic food; the sustainable aware consumers focus on the environmental aspects and the consumers searching for authenticity focus on closeness and safety (section 4.1). On this basis Ethical/Sustainable Awareness does not drive A Search for Authenticity, hence it is rated with 0.

The trend does not have a high impact on *A Healthy Life* and *time/convenience*. We do not see any relation between that the more ethical and sustainable aware the upper middle class is, the more/less time they get and the more/less they seek A Healthy Life. Therefore, these are rated with 0. In contrast, the trend has a high impact on *Polarization of Price and Quality*. In 2020 we assess that Ethical/Sustainable Awareness will be highly present among the families of the upper-middle class, and we also assess that consumers increasingly will buy the most important products in a high-end channels and the rest of the products in discount channels. Since ethical (fair trade) and sustainable products are often more expensive and present in high-end stores this can increase the degree of polarization. However, one must also consider that it is possible that discount channels increasingly offer a larger assortment of fair trade and sustainable products. This development already takes place (fodevareplatform.dk, 2011. Politiken.dk, 2010), and as fair trade and sustainability will still be an important factor for the upper-middle class in 2020, the discount channels can also be expected to extent their assortment in this area. Consequently we choose to rate Ethical/Sustainable Awareness' impact on Polarization with 1.

4.2.5 Time and Convenience's impact

As stated (4.1), the Danes perceive they are increasingly busy; hence they seek solutions that enable them to run more errands, more errands at the same time and live a more flexible life. These factors increase the trend of *Automatization* as automated solutions are demanded in an attempt to save time and live a more convenient life. In section 4.1 we discussed the relation between the use of automated products and the feeling of busyness, where the Danes continuously demand automated products and more time. Therefore, we assess that Time and Convenience has a high positive impact on Automatization that significantly drives the trend, and we rate the impact with 3.

In contrast, Time and Convenience have a negative impact on *A Search for Authenticity* and *A Healthy Life*. The fact that the upper-middle class is busy leaves little time to cook their own authentic and healthy food and little time to exercise. As A Search for Authenticity has very little strength compared to Time and Convenience we rate this with -3. We choose to rate the impact on A Healthy Life -2. Firstly, as we assessed (4.1) that A Healthy Life can be very important to the upper-middle in 2020, and the trend is stronger than e.g. A Search for Authenticity. Moreover, an analysis by Søndagsavisen [The Sunday Newspaper] (sondagsavisen.dk, 2011) indicates that the busier the Danes are the less we exercise, and if the Danes had 8 days a week 30% would exercise more. However, we also believe, that due to the large demand for time saving and convenient solutions there will also be more solutions on the market in 2020 that makes families of the upper-middle class able to live A Healthy Life while being busy. Accordingly, we choose to assign the impact on A Healthy Life with -2.

We do not assess that Time/Convenience has any impact on the trends Polarization of Price and Quality and Ethical and Sustainable Awareness as we do not see any indications in the findings we are in possession of that Time and Convenience drive these trends, hence Time and Convenience's impact on these two trends is rated with 0.

4.2.6 A Healthy Life's impact

We evaluate that A Healthy Life has no impact on *Automatization* and *A Search for Authenticity*. The trend of living A Healthy Life does not result in more automated products being demanded or that consumers search more for authenticity. The trend of A Healthy Life can have an impact on *Polarization of Price and Quality* and the upper-middle class will therefore favor distribution channels that have a large assortment of healthy products. Today and the last couple of years many discount channels have had a small assortment of healthy products. On the other hand the discount channels increasingly expand healthy assortments. With the high demand for healthy food we do expect that the discount channels will comply with this demand and follow the market. Therefore, we do not believe that A Healthy Life can drive Polarization of Price and Quality significantly. Hence, we rate the impact with 1.

As we saw A Healthy Life and *Time/Convenience* are two contradictory trends. We want to exercise, but we do not have the time to do it. Here it could be argued that A Healthy Life has a negative impact on Time and Convenience, as consumers prioritize exercising and healthy food. Nevertheless, we evaluate that Time and Convenience will dominate the upper-middleclass' everyday life to a much higher extent than health. Therefore we do not believe that the trend of A Healthy Life will slow down the speed or change the direction of Time and Convenience and rate it with -1.

4.2.7 Summary of the interrelations

By evaluating the interrelations between the six trends we can see that some trends are dependent on others, and some are drivers. The strongest drivers are Time/Convenience and Automatization followed by A Healthy Life. The evaluation also showed that there are no trends that are significant stronger dependent than others. These findings, as stated in the beginning of this chapter, must be considered when creating the scenario in order to make it trustworthy and consistent with the future.

4.3 Evaluation: Impact and certainty of trends

The aim of applying the impact matrix is to select trends to the scenario that are the most certain, and can have the highest impact on the segment in 2020 when choosing FDCs. We can do this by evaluating the findings from both rounds of the expert interviews and the findings from the evaluation of the speed and direction of the trends (4.1). Particularly, we employ the descriptions and ratings from interview round 2, as these can give strong indications of which trends can have the highest impact.

How the experts rated the trends is illustrated in figure 4.6, where each color of the ratings represents each expert. Every expert participating in interview round 2 divided 100 points between the six giga trends. Hence, the highest points are allocated to the trends the experts believe will be most influential on the consumer segment in 2020. The *impact* of the trends is therefore evaluated from the experts' rankings and arguments from interview round 2. The evaluation of the certainty of the trends is based on how each trend can unfold in 2020, which was evaluated in chapter 4.1.

Table 4.6, The experts ranking of trends from interview round 2

Giga trends	Rakings
Automatization	19+15+25+25+5+12+15+20=**136**
A Search for Authenticity	5+15+15+5+20+4+0+15=**79**
Ethical and Sustainable Awareness	15+15+10+0+10+4+15+10=**79**
A Healthy Life	11+20+10+15+10+20+30+5=**121**
Time/Convenience	30+25+40+30+25+10+22+30=**212**
Polarization of Price and Quality	20+10+0+25+30+50+18+20=**173**

Source: Thesis illustration: Expert interviews round 2

4.3.1 Automatization

Automatization has received the third highest rankings from the experts. The rankings are evenly divided with high points by the experts (12-25 points) and the degree of consensus is high. However, one expert rated Automatization with 5 points. The expert believes that Automatization *"(…) could be big, but 2020 may be too soon"* (expert interview, round 2), which must be taken into consideration when assessing the impact. In section 4.1 it was stated that the speed of consumers acquiring new technologies such as mobile phones and internet access has increased with respectively 38% in 1996 to 96% in 2006 for mobile phones, and 10% in 1998 to 87% in 2010 for internet access. Additionally, it was affirmed that younger segments adapt new technologies faster than the elder segments. Therefore, it can be assumed that our segment in focus, due to their younger age, adapt future technologies quicker than the average consumer. Taking these developments into consideration it is highly assumable that a large share of consumers in our segment seeks automated solutions in their everyday life in 2020. Hence, in contrast to the expert's rate of 5 points, we agree with the rest of the experts that Automatization may have a large impact on the food shopping environment and the upper-middle class' choice of FDSCs in 2020.

These tendencies too indicate that Automatization can be highly developed in 2020. This evaluation is based on past and current developments in the society, however we cannot assure that future Automatization will develop accordingly. Additionally, no one – not even the experts can predict with exact precision how Automatization evolves. Therefore, although current indications point towards Automatization being highly certain in 2020, the certainty of Automatization's presence, as we have described it, is evaluated to be medium in 2020.

4.3.2 Polarization of Price and Quality

As we described in section 4.1 we choose to continue with Polarization of Price and Quality. Here it was argued that we will evaluate the impact of the trend with main emphasis on the experts' descriptions and arguments from interview rounds 1 and 2, and not with emphasis on the total ranks and the consensus between the ranks.

There is a high agreement between the experts that price is an important factor in 2020. They especially put emphasis on the certainty that families of the upper-middle class increasingly will be fond of discount channels, while still buying some food in high-end channels. 5 out the 8 experts from interview round 2 emphasize this aspect, and thus we can expect the trend to have a high impact on the segment. Those who do not emphasize these characteristics describe the trend as "value for money", hence not with main emphasis on Polarization of Price and Quality. Moreover, in section 4.1 it was stated that the trend is highly certain, as all information points to a direction towards 2020 where the middle-market will nearly vanish, and discount channels dominate the market followed by high-end channels. Therefore, we assess Polarization of Price and Quality is highly certain, and with a high impact on the segment in 2020.

4.3.3 A Search for Authenticity

The impact of A Search for Authenticity on families of the upper-middle class' choice of FDCs in 2020 is evaluated to be low. The experts' arguments are e.g. that "*Authenticity only attracts a small segment*" (expert, interview, round 2. Rated the trend with 5 points.), and "*Authenticity is a trend, but the impact on choice of retailing channel is limited*" (Interview 2. Rated the trend with 15 points.). Furthermore, one expert rated the trend with 20 points and emphasized that it will be present in 2020, but agree that it will be among smaller segments. Hence, authenticity is evaluated to be present in 2020, but the impact on the choice of FDCs is limited. In section 4.1 the certainty of A Search for Authenticity was evaluated to be high, and so the trend obtains high assessment on this aspect.

4.3.4 Ethical and Sustainable Awareness

The trend of Ethical and Sustainable Awareness has received low ratings from the experts with a high degree of consensus, indicating that the trend will have minor impact in 2020. Although the trend is rated equally low with the trend of A Search for Authenticity we judge from the expert's arguments in round 2 that Ethical and Sustainable Awareness is of higher concern in the upper-middle class, and if the trend is sat in opposition to A Search for Authenticity, Ethical and Sustainable Awareness will have a higher impact on the choice of FDCs in 2020. Hence, we evaluate the trend will have medium impact. In terms of certainty we evaluated (4.1) that the trend continuously will be of high interest for the upper-middle class, and that consumers will expect their surroundings, e.g. industries but also fellow consumers, to behave ethical and sustainable correct. Consequently, the certainty of the trend in 2020 is evaluated to be high.

4.3.5 Time and Convenience

> "One stop shopping, easy access and efficiency is hugely important. And no matter how much the other trends will influence the consumer you will still see the vast majority of consumers use the supermarket that is closest to the home, the school, workplace etc." (expert, interview, round 2. Rated the trend with 30)

This quote emphasizes the impact of the trend, which received the highest rankings (more than 25% of the totals points). One expert rated the trend with 10 points, which is much lower than the other experts who rated the trend with minimum 22 points. The expert's argument is: "*Weekly working hours will increase, convenience is also driven by higher transportation costs, consumers will seek local food distribution channels*". Hence, the expert does not disagree that the trend has impact, merely that other trends have larger impact. However, since the trend is rated with the highest impact and highest degree of consensus there are strong indications of the impact on the choice of FDCs in 2020, and thus we choose to oblige this view. In section 4.1 we assessed that the Danish upper-middle class feel increasingly busy and that the trend will keep a steady speed towards 2020. Hence, the trend can be also assumed to be highly certain in 2020.

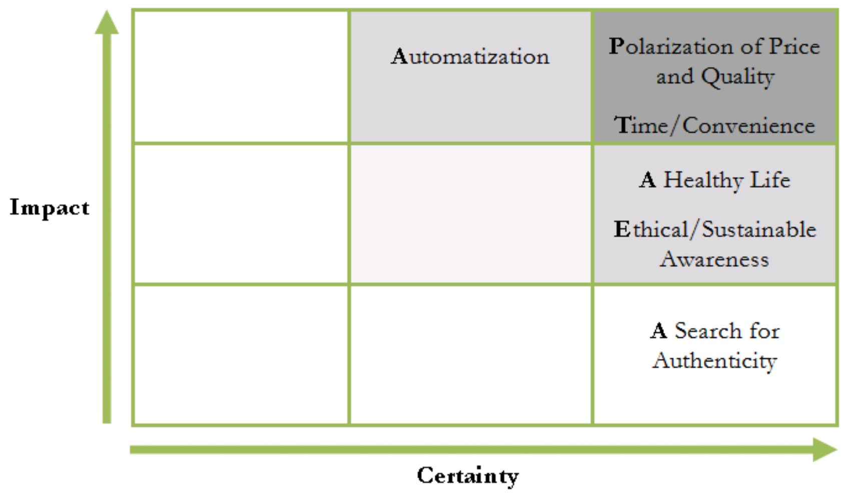
4.3.6 A Healthy Life

The experts' ratings indicate a medium impact on the trend A Healthy Life. Consensus among the ratings is present except from one expert that rates the trend with 5 points. The expert's argument is that "*We want to be healthy (…), but we do not want wagged fingers and we want to shop in places that both have healthy and unhealthy products*" (expert, interview, round 2). We acknowledge the fact that not all consumers anticipate the "health wave" that has been present in the Danish society. On the other hand, a large majority of the information we possess indicates that the trend continuously will have an impact on consumers' choice of FDCs in 2020. Today, consumers already seek healthy products (experts, interview, round 2), which particularly have an impact on the product assortment the upper-middle class acquires that in turn have an impact on the choice of FDC (Brown, 2003: 1675). In section 4.1 it was assessed that the upper-middle class can be expected to have a more realistic view on health. In this respect, it was also argued that the characteristics of the trend change accordingly. The trend will therefore move in a positive pace towards 2020, however it will not develop as fast as during the last century. Thus, to judge from the ratings and the assessments in section 4.1 we assess that A Healthy Life will have medium impact in 2020. It was found (4.1) that the trend can be assumed to be highly certain in 2020, as the information we are in possession of highly indicates that the trend will be an important issue to the upper-middle class.

4.3.7 Trends to continue with in the scenario

Based on the empirical analysis we have chosen the trends Automatization, A Healthy Life, Time and Convenience and Polarization of Price and Quality.

Figure 4.8, Impact/Certainty matrix: evaluation of trends in focus



Source: Inspiration from Lindgren and Bandhold, 2009

Automatization is selected as it is evaluated to have a high impact on consumers' choice FDCs and as it is assessed to have the strength to change the upper-middle class' food shopping habits immensely. Accordingly, A Healthy Life is chosen as we expect that the trend is certain and to be a more significant issue to our segment in 2020, although the focus on health is projected to be more realistic. Time and Convenience appear to be the most certain trend with the highest impact; hence the trend may have the power to direct consumer behavior significantly. Lastly, the presence of Polarization of Price and Quality in 2020 can have large impact on the how the segment chooses channels over another, while being highly certain.

Due to the reasons stated above we continue with four giga trends in the scenario. As mentioned, the scenario is based in the following: In the trend analysis (The evaluation: Speed and direction of trends) it was argued how fast and in what direction the four trends will travel in 2020. In the cross-impact analysis it was examined how the four trends are interrelated and what impact they can have on each other's speed and direction. Lastly, in the certainty/impact analysis it was evaluated how certain the trends will be and further how high impact they will have on the segment in 2020. The trends chosen were evaluated to be either medium or highly certain and further to have a medium or high impact in 2020. Thus, the empirical analysis helps facilitate a vivid description of how the four trends influence the segment when choosing FDCs, which take place in the following section.

4.4 Scenario

In this section we present the scenario of 2020, which will complete the empirical analysis. The main purpose of the scenario is to provide the reader with a vivid representation of how the identified predominant trends will affect the choice of FDCs among families of upper-middle class age 20-40 years, in Denmark in 2020.

The scenario is a description developed according to the knowledge obtained in the empirical analysis. The predominant trends identified were: Polarization of Price and Quality, Automatization, A Healthy Life, and Time and Convenience. All these evaluations were developed to enable us to create a strong representation of the future year 2020.

4.4.1 The scenario of 2020

The everyday life of the families of the upper-middle class is in 2020 characterized by busy lifestyles where time is scarce. Both parents of the family are career minded, and work long hours (at least 37 hours a week) in order to afford "The good life". Spending time with family will often have a very high priority, whereas food shopping and other mundane activities will have a low priority. In addition, the increasing amount of smart phones, Ipads, computers or other future electronic devices are highly demanded among the upper-middle class as these allow them to carry out several tasks at the same time. This will increases task efficiency, but at the same time increase the amount of tasks expected to be completed. Thus, the extra time families desire is difficult to achieve.

The upper–middle class has become polarized in terms of price and quality. The segment is on one hand price-sensitive and will strive to employ FDCs that offer the cheapest prices. However, this will only be a measure for the basic groceries and products not considered to have special value. Especially, value is a keyword for the upper-middle class that on the other hand has developed a quality awareness that is extremely subjective and based on core values of the individual. From these subjective perspectives they judge which products to buy in terms of quality, and which products to buy based on price. However, these judgments will be highly selective and hard to make sense of. The same family might buy high quality free-range chickens at the high-end stores, because they believe in animal welfare, but the next day they will buy factory pork in the discount store because they believe pigs are not as important as chickens. Some products will be favored and must have quality labels, whereas other products will be de-prioritized and only bought at a cheap price. The upper-middle class will compromise neither price nor quality, and will therefore engage in channels that offer cheap prices when shopping for basic products, and employ channels that offer the absolute best quality, where price will be high.

At the same time families of the upper-middle class are aware of healthy lifestyle choices, and they try to act in a responsible way. Healthy foods are popular, especially food without additives and diets that carry the real prescription of healthiness. Though price is important, so is health. Therefore, discounters who can offer a product assortment that contain these two elements are highly favored. For a small part of the segment, it has become popular, to have dietary experts design a customized diet for the whole family – thereby getting the right advise and the right diet. Small online suppliers deliver "the customized diets" in a bundle solution with food, recipes and drinks. Thereby they provide the family with both convenience and healthiness. Families will often experience difficulties in acceding to a healthy life and will be forced to compromise. This means that families choose to assign a lower priority to food shopping and the home cooked meals, as they prefer to allocate this time to leisure activities. However, as these tasks will not perform themselves the upper-middle class will demand solutions that can help them gain extra time while at the same time act out a healthy life.

The upper-middle class will be more dependent on their mobile phones in 2020, which for a large part of the segment will work as a shopping tool. When shopping in offline channels the smart phone can be applied as a scanner and as a source of payment, since FCDs have incorporated a large degree of self-service in order to offer cheaper prices. However, it will still be possible to pay with cash at a register.

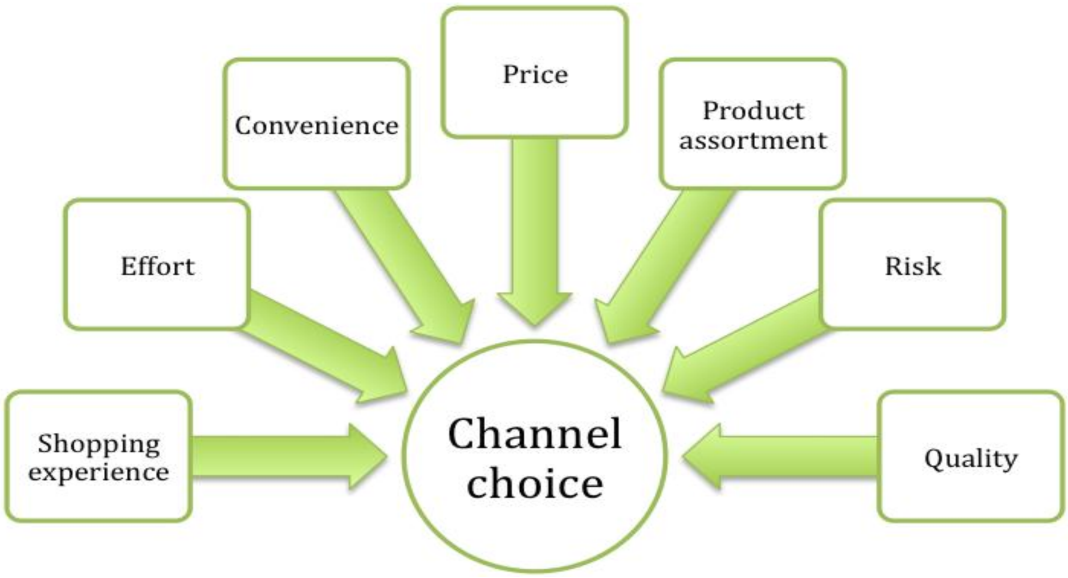
Approximately 50% of the segment is engaged in online food shopping in 2020 where, especially M-commerce is popular. In addition, new home management systems have been introduced, as the smart phone can work as a scanner. Before disposing empty products, family members are able to scan the product packaging and thereby add the product to an online shopping list that is synchronized between the smart phones of the household. These shopping lists can be connected to online channels or employed when shopping in offline channels. Additionally, E-and M-commerce is recognized as a convenient and fast way to get the task of food shopping completed, without putting much time or effort into it. Online channels are highly favored because a server can keep track of items bought, as this information is stored in its memory. This feature enables members of the family, to see what was ordered last time and simply press re-order. Furthermore, deliveries or pick ups can take place in a number of ways either at home, at work, at the children's daycare or at the mall where one can easily swing by while running other errands.

In 2020 the upper-middle class families will be too busy to explore cooking tricks and new dishes on an everyday basis because spare time will be allocated elsewhere. The upper-middle class will instead a few times a week, enjoy "HealthEat foodbags", which are bags with healthy ready-to-cook food with recipes and beverages that can be prepared in 10 minutes (healthy fast food). These bags are purchased in many different channels, such as petrol stations, take away parlors, supermarket or online. Moreover, it has become popular for larger companies to offer employees to purchase such foodbags at work, which saves the employees the time to stop for shopping on the way home.

5.0 DISCUSSION

The result from the empirical analysis and the scenario explain that the four giga trends: Polarization of Price and Quality, A Healthy Life, Time & Convenience and Automatization influence the segment when choosing FDC's in 2020. This chapter will take on a theoretical approach and investigate which channel attributes will be significant for consumers when choosing FDCs in 2020. The theory of channel choice and channel attributes, presented in the theoretical framework, will be tested in relation to the results from the empirical analysis and the scenario in order to examine if existing theories are still applicable in 2020. Additionally, we discuss possible managerial implications as well as opportunities that arise in the light of the empirical analysis and discussions.

Figure 5.1, Theoretical framework illustration



Source: Thesis illustration

5.1 Shopping experience

Bearden (1977:21) and Pan and Zinkhan (2005:238) mention the atmosphere and the friendliness of sales people, and argue that it can have an impact on consumers' preference of channel choice. Also McCorkle and Reardon (2002:181) argue that a shopping experience can be defined as a value differential, and that it can be measured in terms of utility depending on consumer preference. From this we derive that the shopping experience is part of the consumers' evaluative criteria set when choosing a channel.

The empirical analysis indicated that the trend Automatization will affect the segment, and that a large part of food shopping in 2020 will take place in the online environment by E- or M-commerce. Furthermore, offline channels will be highly automated in 2020, where the level of self-service will be significant. This indicates that the shopping experience will be different, and that there will be less interaction with sales people. However, it is expected that the segment will be accustomed with the anonymous interaction when shopping for food, as this has been the development in recent years. It is plausible that the online channels will be more suitable for experience-based shopping as technology is expected to become even more interactive. Further, online channels provide an environment where consumers can be entertained at little cost. However, in the empirical analysis there are only few indications of whether or not the shopping experience in FDC is something consumers consider important when evaluating the criteria set and choosing FDCs.

Hansen (2006:109) discuss if the shopping experience can have an effect when consumers choose FDCs. In his study he argues that consumers who frequently shop online acknowledge that the experience online is not as fulfilling as offline. This indicates that the shopping experience is evaluated. However, since these consumers still shop for food online, it could indicate that the shopping experience in grocery shopping is not considered especially important. Additionally, a large part of the segment grew up with the Internet as a shopping tool, and it is therefore expected that they will be familiar with the online setting and also have a positive attitude towards an online shopping setting. Moreover, as mentioned above, it is highly likely the shopping experience online will be perceived as interesting and will feel just as authentic as offline food shopping in 2020. The online vs. offline barriers are therefore not considered to be a concern for the shopping experience and choice of FDC's among the segment in 2020.

The empirical analysis revealed that the trend of Polarization of Price and Quality will have an effect on the segment. When describing the segment in discount channels one expert states: "*The price must be among the lowest but the shopping experience must not be completely horrific*" (Interview 1. Own translation). From this we derive that the shopping experience is evaluated in the criteria set but is not considered very important. Additionally, it is possible that the segment will have higher expectations to the shopping experience when engaging in high-end channels, as these channels are expected to deliver high quality and added value. However, we have no empirical findings that indicate this presumption.

5.1.1 In sum

Due to the reason that only one expert mentions The Shopping Experience in relation to the four predominant giga trends, we cannot draw definite suggestions that the Shopping Experience is a significant attribute for the segment in 2020. Moreover, no other information we possess emphasizes Shopping Experience as a channel attribute. Thus, we acknowledge that more indications of that The Shopping Experience is significant to the segment, must be present in order to confirm the theory. It is plausible that the result would have been different, had other trends been included or a different segment was examined. Therefore, in order to obtain a better clarification of our results, we stress the importance of conducting more research in this area in the future.

5.2 Effort

Balasubramanian (1998: 183) argues that consumers evaluate the effort of each channel when choosing among retail channels. Effort is discussed in terms of sunk costs, where Balasubramanian(1998: 183) argues that consumers have to make an effort getting to the channel. He further argues that online channels have an advantage as the products are delivered and consumers do not have to make an effort to attain the product. McCorkle and Reardon (2002:181) claim that consumers often switch from one channel to another due to effort tradeoffs between channels. Additionally, Hansen (2006:109) argues that a number of consumers choose online channels due to the less physical effort needed to engage with the channel. Hence, the above research suggests that consumers evaluate effort in their criteria set when choosing channels.

In the empirical analysis there are many indications that consumers will develop preference for E- or M-commerce, which can reduce the level of effort when shopping food. One expert claims that especially effort will be evaluated: " *In the long run, and that is, 2020, retailers as we know them today, but also take-away places…Well they need to ask themselves why in the name of god customers physically should drag themselves down to their shop? Consumers who are stressed out would rather do anything else than stand in line*" (Interview 1, Own translation). Hence, as E- and M-commerce grow in popularity among the segment, it will become difficult for offline channels to motivate consumers to physically visit their channels, due to the extra level of effort that needs to be made. The scenario described that consumers in 2020 will assign low priority to food shopping and demand solutions that can reduce the time and effort spent in FDCs, as they wish to allocate time and effort to leisure activities. Additionally, this suggests that effort can have an influence on the segments' decision of FDCs in the future. If the segment increasingly favors channels that offer a reduced level of effort this can be an early warning for those FDCs only engaged in offline channels. In order to maintain a presence in the market place marketers should investigate what attributes consumers associate with offline channels and highlight these in order to move focus away from the negative aspect of the effort engagement. However, in the long run, this might not be sufficient and a more radical change might be appropriate such as expanding with online channels or other solutions that reduce the effort level.

5.2.1 In sum

The segment will evaluate Effort tradeoffs when choosing FDCs in 2020. Concurrently with the impact of Automatization, the difference in effort level between online and offline channels can increasingly be acknowledged, and the segment will gradually prefer online channels. This becomes significant for marketers of offline channels, as they must emphasize the offline attributes that appeal to the segment. Hence, offline marketers must generate incentives that encourage the segment to shop offline. Thus, our research proposes that existing theory from the theoretical framework, arguing that effort is a part of the segment's evaluative criteria set when choosing channels, is applicable in 2020.

5.3 Convenience

Stephenson (1969:60), Bearden (1977:21), and Balasubramanian (1998:183), Brown et al. (2003:1674), Gehrt and Yan (2004:15) and Pan and Zinkhan (2005:238) identified convenience as an important attribute to consumers when choosing channels. A few of the researchers discuss convenience as a general attribute and others discuss it in terms of convenient parking facilities, opening hours and fast check out. Balasubramanian (1998:183) suggests that consumers experience sunk costs, which partly is the implicit cost of inconvenience such as taking the time to travel to the channel, which consumers seek to minimize.

The findings from the empirical analysis suggest that the segment will feel increasingly busy, and they will develop preferences for solutions that can make their everyday life less complicated. As One expert argued about Time and Convenience: "*No matter how much the other trends will influence the consumer, you will still see the vast vast majority of consumers use the supermarket that is closest to the home, the school, workplace etc*" (Interview 2, Own translation). This statement indicates that consumers will have strong preferences for channels that can minimize time spent on grocery shopping.

The Empirical Analysis proposed that the slow development of E- and M-commerce within FDCs is caused by the fact that marketers have difficulties adjusting to the online environment and to meet delivery standards. However, the experts claim that the segment is ready to engage in the online environment. This indicates that a market space is available for online food retailers in which they have the opportunity to gain large market shares. Developing the right online solution may therefore enable marketers to be first to market with a solution and business model that they can make profits from.

The Empirical Analysis indicates that Automatization will have a high influence on the segment and the way they perform their daily tasks. Although automated solutions will provide opportunities to perform more tasks at the same time, it will accelerate the need for even more convenient solutions. The Emperical Analysis suggests that Home Management Systems, where smartphones can be used to scan food and order food automatically, can be possible new developments. Also other digital applications that can make the segment's life more convenient will be favored. In this respect, if marketers are first to develop these solutions they can attain a blue ocean.

Moreover, the segment will not always be willing to travel to offline FDCs, which suggest that the channels must find a solution where they deliver food directly to the consumer such as deliveries at workplaces or daycare centers.

Further, the results from the Empirical Analysis indicate that the segment will have a preference for channels that offer convenient product solutions and channels that can minimize the time spent on preparing food. Hence, convenience will influence the consumers' preference and will be evaluated in the criteria set when consumers choose FDCs. Marketers should take advantage of this by developing solutions that can meet the demand of the segment. Marketers within product development should pay attention to the bundling trend where more services are mingled in one. In the scenario it became clear that many families will resort to the bundled solutions a few times a week, and we expect that these solutions will become increasingly popular. However, this is not a product only suited for retailers, but can also fit in restaurants, take-away places (where they can already be bought), gas stations, workplaces etc. Whether channels are online or offline, they can provide the segment extra spare time.

5.3.1 In sum

Convenience will have an influence on the criteria set that the segment employ when choosing FDCs, and will therefore be significant. Our results denote that theory proposing that convenience is an important attribute for consumers, and will be applicable in 2020. Additionally, Convenience was the trend with the highest certainty and impact, and received the highest rankings by the experts, meaning that the experts believe that it is the most influential trend in 2020. Further, our result strongly point toward that Convenience has a vast effect on consumers in their channel choice, and FDCs must make an effort to accommodate convenient solutions, which not only can be attained by ordinary supermarkets but also alternative channels.

5.4 Product Assortment

According to Sleth (in McGoldrick, 2002: 105) there is a difference between the criteria set consumers employ when choosing FDC, and the criteria set employed in the choice of which product to choose.

However, Sleth (in McGoldrick, 2002: 105) argues that consumers naturally choose the channels that carry the products they desire. Stephenson (1969:69), Bearden (1977: 21) and Brown et al. (2003:1675) argue that Product assortment is a part of consumers criteria set when choosing channel.

The Empirical Analysis indicates that the trend Polarization of Price and Quality can drive the segments' preference toward a discount Product assortment or a high quality Product assortment. Thus, the segment will favor channels that carry the product assortment they have preference for in a particular situation. This indicates that product assortment will be part of the segments evaluative criteria set in 2020. Additionally, the Empirical Analysis proposes that the segment is highly influenced by A Healthy Life and takes interest in healthy products. The health interest will manifest in the segments' preferences of product assortment, which in turn will be expressed in the segments criteria set when choosing alternative FDCs.

Furthermore, several of the experts claimed that a part of the segment will be interested in a personal dietary profile and customized diets. Creating FDCs that can provide the right diet and supply the food in question can be a possible opportunity for marketers within FDCs. Schoemaker and Day (2006) argue that organizations must utilize their peripheral vision and observe changes not only within their own industry but also take notice of changes in other industries. They propose that doing so can enable marketers to create new products that are a bridge between industries, which can bring them ahead of competition. Hence, creating joint ventures between FDCs and dietary experts regarding customized diets can be a possible blue ocean in 2020. Thus, this trend can be interesting to follow for marketers within FDCs that wish to differentiate and be first to market.

5.4.1 In sum

Product assortment will be a part of consumers' evaluative criteria set, and can have an effect on the choice of FDCs. Our findings strongly suggest, that the segment will choose channels based on the product assortment in the different channels. The trend Polarization of Price and Quality will drive the segments' preference towards a broad discount product assortment or a high quality product assortment. Thus, the segment will favor a channel that offers the product assortment they have preference for in a particular situation, which indicates that product assortment will have a large impact on the consumers' choice. Further, our result indicates that theory claiming that product assortment is an important channel attribute among consumers can be applied in 2020.

5.5 Price

Price is one of the channel attributes that researchers mentioned the most in the literature reviewed. Stephenson (1969:69), Bearden (1977:21), Balasubramanian (1998:183) McCorkle and Reardon (2002:181) all argue that price is part of consumers evaluative criteria set when they choose between FDCs. However, they discuss the price from different perspectives. McCorkle and Reardon (2002:181) argue that relative price is measured against the utility of the act.

The findings from the Empirical Analysis imply that the segment in 2020 will employ a polarized price strategy and will be willing to pay a higher price for products they perceive have added value and importance. As McCorkle and Reardon (2002:181) argue, utility can be an experience such as entertainment, and it can be argued that the added value the segment can achieve from the high value products are classified as utility by the segment. In a situation like this, preference is driven by values, and it can be argued that price is not a part of the segments' criteria set or even seen as a channel attribute. However, it is not expected that the segment are willing or able to pay an infinite amount and that natural constraints will force them to choose among alternatives they can afford. Therefore, price becomes a natural part of the criteria set the segment employ when choosing FDCs.

Balasubramanian (1998: 181) explains that consumers endure sunk cost such as transportation cost and online freight costs. As mentioned, the results from the empirical analysis show that consumers will be highly price aware when buying basic groceries, which lead us to believe that transportation and freight costs also will be a consideration in 2020. A large part of the segment will buy basic groceries online, but if it is not possible to purchase the groceries at the same price as in offline channels, it is highly certain that the segment will choose the cheapest option and thereby let price drive preference and channel choice. In the empirical analysis it became clear that one of the reasons for the current slow development within online FDCs is due to the fact that retailers have a hard time adjusting their business models and gaining profits, which essentially mean that food today is more expensive online than offline. One expert also emphasize that some consumers believe it is expensive to buy food online. According to the empirical analysis it is only a matter of time before the online channels will have rearranged their business models depending on the differentiated services they will offer, and we believe that price will be important in online strategies. Further, we propose that competition could accelerate in terms of freight cost reductions, where online channels will try to get consumers to purchase higher quantities and have few deliveries in return for low freight costs.

The trend of Polarization of Price and Quality will also manifest the segments' price awareness, where our results show that the segment only will pay cheap prices for basic groceries that are perceived as less important. Since the segment will buy their groceries at the cheapest place (everything else equal) this indicate that price will be part of the segments evaluative criteria set and further influence the segments' choice FDCs in 2020.

As the segment will prefer either discount or high-end, we expect a high pressure on retailers in the middle market. One expert argues: "*When Politikken and Jyllandsposten (large Danish newspapers) test and claim that the chopped tomatoes in discount channels are among the best quality, then why would anyone go to Superbrugsen (Danish middle retailer) and pay twice as much*" (Interview 1, own translation). In addition, another expert argues that the discount channels will expand and possess a market share of 50% in 2020 compared to 35% today (Interview round 1). It is therefore highly plausible that the middle market will be less predominant in 2020 and that many of these outlets will be replaced by discounts retailers. Additionally, those retailers in the middle market must consider and examine if they can develop their business models in new directions or whether they should adapt toward either high-end or low-end. In other words, the middle market must revise their strategies in order to win consumer patronage in 2020 and thereby survive in the industry.

5.5.1 In sum

In 2020 price will be a channel attribute consumers evaluate when choosing FDCs. Our results confirm current theory, proposing that price is an attribute consumers consider when evaluating channel choice. The trend Polarization of Price and Quality will affect how consumers reason about price. Price will be considered very important in relation to discount channels providing basic groceries. This implies that price will have a large effect when consumers consider discount channels. In high-end channels, consumers are willing to pay more, due to the added value they receive. However, natural constraints will ensure that price continuously will be part of consumers criteria set when choosing FDCs.

5.6 Quality

Stephenson (1969:60) argues that the dependability of the store such as quality of products, level of value and dependability of products can influence consumers' preferences and channel choice. Bearden (1977:17), Balasubramanian (1998:184) and Pan and Zinkhan (2005:238) claim that product quality is important and that consumers evaluate Quality in their criteria set before committing to a choice of channel.

Due to the Polarization of Price and Quality the segment will employ a quality strategy highly driven by individual values. This means that products where quality is important will be bought in high-end channels, which indicate that quality is evaluated in the criteria set when consumers choose FDCs in 2020. However, consumers are highly price aware when purchasing basic groceries and we expect that the emphasis on the discount channels' quality compared to the important products and high-end channels.

As mentioned in the previous section our results propose that the market will experience a division in terms of high-end versus low-end and it is expected that the middle market will experience a decline. Again we urge marketers of the middle market to examine which strategy that can be favorable in order to archive consumer patronage in 2020 and stay in the market.

Additionally, the Empirical Analysis indicates that the trend A Healthy Life will influence consumers reasoning about quality. The segment has a high preference for real food without additives, and categorizes the fake food with additives as low quality foods. They will favor channels that can deliver a wide product assortment of quality foods. Hence, consumers will evaluate the quality a channel offers in their criteria set before choosing a FDC. However, it will be interesting to see if the discount channels will be able to keep providing consumers with the healthy product assortments at low price, as this would give the discount channel an even more dominant position. Additionally, it is interesting to follow the trend A Health Life and the development within FDCs as this can result in that new channels occur in the market, such as channels selling customized diets as mentioned in the section of Product assortment.

5.6.1 In Sum

The segment will evaluate quality in 2020. Our findings suggest that existing theory, claiming that consumers evaluate quality when choosing channels, is applicable in 2020. However, the importance of quality highly depends on the products required. The segment are expected to be highly influenced by personal values, and it therefore becomes difficult to estimate what kind of products will be important to the segment in terms of quality.

5.7 Risk

Balasubramanian (1998:184) propose that the product should fit the channel and that risk is evaluated in the criteria set when consumers choose channels. He argues that when the quality of a product is uncertain (performance risk), offline channels are preferable because the possibility of to inspect the product. Also Hansen (2006:110) mention the aspect of perceived risk. When risk is mentioned it is often related to purchasing through online channels where there is no personal interaction or possibility to inspect the product.

Hansen (2006:94) suggests that consumers can hesitate to buy food online because of complex environments and that retailers should develop websites that are easy to navigate. His results indicate that perceived risk was only a direct concern for those inexperienced with online shopping. In this case Hansen (2006:110) stress the importance of "risk relievers" and making the consumer feel safe as important attribute. As the segment in focus will grow up with internet and be accustom to shopping in online environment we do not assess this will be an issue. As Hansen (2006:110) argues it is only those inexperienced who endured risk concerns. Further, no indications in our empirical analysis point to risk as an influential attribute.

5.7.1 In sum

None of our findings indicated that Risk is a channel attribute evaluated by the segment in 2020. None of the information we possess point toward risk being a significant attribute in 2020. Therefore we cannot confirm current theory that argues risk is an attribute evaluated by consumers. It is plausible that the result would have been different if other trends had been included or another segment was examined. Further, it is possible that perceived risk is more predominant in an extensive problem-solving situation and less in habitual groceries purchases. Additionally, to gain a clarification of our results, we stress the importance of more research within this area in the future.

6.0 CONCLUSION

The aim of this study was to explore what can influence the Danish consumers when choosing food distribution channels in 2020, and further to test if current theories of channel attributes can be applied in the year of 2020. Studying the future is difficult, as no one has the ability to create a complete and accurate picture of the future. However, we have sought to provide a credible representation.

Derived from 10 expert interviews and the empirical analysis, our results suggest that four predominant trends will influence the Danish families of the upper-middle class 20-40 years of age when choosing FDCs in 2020. These are; Time and Convenience, Automatization, A Healthy life, and Polarization of Price and Quality.

- Automatization will influence the segment when choosing FDCs, by providing technological solutions such as Home Management Systems and smartphones. The segment will increasingly employ automated tools that provide the possibility to engage in food shopping whenever they have time available. As Automatization provides increased efficiency, the segment will constantly strive to accomplish more in less time, which in turn reinforce a demand for even more convenient solutions.

- Time and Convenience will have an influence on consumers when choosing FDCs. Families of the upper-middle class will feel increasingly busy, will prioritize spare time with the family and assign less time to mundane activities such as food shopping. This increasing time pressure will motivate the segment to shop in convenient channels, such as online channels or pick-up points located close to their daily route. Additionally, the segment will purchase bundled product solutions that are easily accessible and reduce the time spent on cooking.

- A Healthy Life will influence the segment when choosing FDCs, and the segment will strive to combine a healthy lifestyle with an increasingly busy life. However, most commonly, the healthy life will be compromised in order to gain extra time. Families of the upper-middle class will experience difficulty in balancing the two aspects of life. The segment will attempt not to compromise, by choosing channels that provide healthy products. This indicates that A Healthy Life will influence the majority of the segment, as they will choose FDCs based on a healthy product assortment. However, a small share of the segment will have high preferences for healthy dietary, and they will engage in channels that can increase the sentiment of healthiness. Our results further indicate, that niche channels providing customized diets and food delivery, can emerge as a respond to A Healthy Life.

- Polarization of Price and Quality will influence the segment and will be expressed in terms of the segment's focus on high quality and low price. The segment will be motivated by individual values, and will focus on quality when products are important to them. These purchases will take place in high-end channels that offer the required level of quality. Simultaneously, the segment will be highly price sensitive, and will avoid purchasing products at over price. Especially, ordinary groceries are prioritized low, and the segment will seek channels with cheap prices.

Our findings propose that five out of the seven channel attributes will be significant to the segment when choosing FDCs in 2020. The five attributes are; Effort, Convenience, Product Assortment, Price, and Quality. Two channel attributes were not supported by our findings these are; The Shopping Experience and Risk.

- Effort tradeoffs will be significant to the segment when choosing FDCs in 2020. The difference in effort level between online and offline channels will progressively be recognized, due to the fact that Automatization will continuously provide more effortless solutions. The segment is therefore expected to increasingly prefer online channels. Thus, our research argue that existing theory, proposing that effort is an important attribute when choosing channels, will be applicable in 2020.

- Convenience will be significant to the segment when choosing FDCs in 2020 and will be evaluated in the consumer's criteria set. Our result suggests that Convenience will have a vast influence on consumers in their channel choice, and they will increasingly employ channels that reduce time spent shopping, as well as cooking. Therefore, theory proposing that convenience is an important attribute for consumers will be applicable in 2020.

- Product assortment will be a significant channel attribute to the segment in 2020, as they will employ specific channels in order to accommodate high interest purchases and other channels for low interest purchases. Thus, the segment will favor a channel that offer the product assortment they have a preference for in a particular situation. The segment thereby chooses FDCs based on the product assortment a channel can offer. Theory suggesting that Product Assortment is an essential attribute in consumers channel choice will be applicable in 2020.

- Price will be a significant channel attribute in consumers criteria set when choosing FDCs. The segment will especially evaluate price in relation to basic groceries in discount channels. The segment will be prepared to pay higher prices when purchasing high interest products, although they will still be forced to consider the aspect of price in these purchases due to income constraints. Thus, theory claiming that price is an important attribute to consumers when choosing channel will be applicable in 2020.

- Quality will be an important channel attribute to the segment when choosing FDCs in 2020. The segment will employ a differentiated quality strategy. When products are important to the segment they will choose channels possessing high quality characteristics. Thus, the segment employs different channels according to the quality level they desire, and quality is therefore a significant attribute to the segment in 2020. Existing theory that suggests quality is an attribute evaluated by consumers in channel choice will therefore also be applicable in 2020.

Two channel attributes were not supported by our findings. These are The Shopping Experience and Risk.

- The examination of the shopping experience did not show any definite suggestions, on whether it will be a significant attribute to the segment in 2020. In the information we posses only one expert mentions the shopping experience as an attribute that can determine channel choice. Thus, we believe more indications of the shopping experience need to be presented in order to confirm theory. Therefore, we cannot confirm theory arguing that the shopping experience is a channel attribute significant to consumers when choosing channels can be applicable in 2020. Additionally, in order to obtain a better clarification of our results, we stress the importance of conducting more research in this area in the future.

- When investigating risk our findings did not reveal any indications that risk is evaluated as an attribute by the segment when choosing FDCs in 2020. Nothing in the empirical analysis point towards risk as a significant attribute among the segment and we can therefore not confirm theory. Thus, we acknowledge that more research of that Risk is significant to the segment must be conducted in order to clarify our results.

It is plausible that the results regarding risk and the shopping experience would have been different, had other trends been included or a different segment was examined. Therefore, we stress the importance of conducting more research in this area in the future as this can clarify our findings.

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8.0 LIST OF APPENDENCIES

Appendix 1, Experts participating in the interviews

Expert name	Workplace	Educational background	Title/profession	Specialities
1. Carsten Beck	Institute For Future Studies, 1990-present	MSc. in Economics	Director of research and future research Consultant	Future Research within market analysis, macro environment, retailing, food manufacturers and consumption. Strategic scenario planning. Sector analysis. The Political Market Place and the Political Consumer. Brands.
Carsten Beck holds a long and pertinent experience within areas relevant to the research problem. His main domain is future research in which he has been engaged for 22 years. Carsten Beck is thereby a seasoned future researcher, who both can gaze deep into the past, present and future and who furthermore have a substantial knowledge in the fields that are most significant to our research that is consumption, retailing and marketing.				
2. Martin Kruse	Institute For Future Studies, 2003-present	Master of Arts	Researcher of future studies, consultant	Trend movements, innovation, creativity, development of foodstuff. Has among others held talks at Unilever, Copenhagen Business School and Lund University
Martin Kruse has worked as a futurist since 2003 and is mainly involved in the link between the future and innovation and trend movements, and also with creativity and food. These specific areas and especially his insights concerning future trends make his knowledge valuable to our study as we wish to obtain knowledge about trends that can influence consumers' choice of food distribution channels.				
3. Simone Mueller Loose	MAPP, Århus University	PhD	Researcher Lector	Food Consumer Behaviour Discrete Choice Analysis and shelf simulations. Modelling consumer heterogeneity. Sensory consumer research

<table>
<tr><td></td><td></td><td></td><td></td><td>Influence of organic, sustainability and environmentally friendly food claims on consumer choice</td></tr>
<tr><td colspan="5">Simone Mueller Loose possess knowledge about how consumers reason their food choices and is currently involved in a project that investigates consumers' food choice. Even though the choice of food does not directly enlighten the choice of food distribution channels these subjects are closely related and thus relevant to our study. Moreover, Loose's work is also related to how consumers shop for food, which is one of the main cores in our research.</td></tr>
<tr><td>4. Søren Askegaard</td><td>Consumption studies, Southern University of Denmark</td><td>PhD. in Marketing</td><td>Professor</td><td>Consumer Culture Theory
Gobalization processes and consumer culture.
Branding from a consumer perspective.
Food consumption, food culture and food symbolism.</td></tr>
<tr><td colspan="5">Søren Askegaard's expertise lies within BDT, CCT, marketing, branding and food consumption. Among others he has been a member of MAPP (together with Klaus G. Grunert also participating in the interviews) and Lund International Food Studies. Thus Askegaard holds a strong knowledge about consumer trends and consumer behavior both from a sociological and more market oriented perspective that is highly relevant to our study. Additionally, Askegaard is author of the book "XXX", which our Literature Framework and Review has been significantly inspired by.</td></tr>
<tr><td>5. Louise Byg Kongsholm</td><td>Pej Gruppen, Scandinavian Trend Institute, 2007-present</td><td>MSc. in Business Administration</td><td>Consultant</td><td>Consumer behavior and trend sociology, food trends, restaurant and kitchen trends, consumption scenarios 2012-2015, the future consumer, retail trends, lifestyle, online trade</td></tr>
<tr><td colspan="5">Louise Byg Kongsholm is a profound trend researcher and consultant, who has a strong ability to create future consumption scenarios. She is both engaged in food, restaurant, kitchen, retail and online trade trends, which are trend areas that are particularly relevant for our study and which makes Kongsholm very qualified to identify pertinent dominating trends in 2020.</td></tr>
</table>

<table>
<tr><td>6. Anonymous consultant</td><td>Anonymous</td><td>MSc. in Business Administration</td><td>Hidden – the consultant has 4 yrs of working experience in the company concerned</td><td>FMCG and retail management, consumer research, economic marketing</td></tr>
<tr><td colspan="5">The anonymous consultant works in one of the most profound worldwide research companies within retail management and shopper insights. The consultant possesses deep knowledge about consumer motivations and behavior, consumers' choice and purchase of consumer products, shopping patterns etc. The consultant is in close contact with management teams and marketing departments in the largest retail chains in Denmark. These characteristics make this consultant a strong candidate to identify future trends that can influence consumers' choice of food distribution channels.</td></tr>
<tr><td>7. Christian Stenbak Larsen</td><td>Metropol, School for bachelors of health and nutrition, External Lector at Copenhagen University</td><td>PhD</td><td>Lector</td><td>Consumer behavior and food culture, the social meaning of food, gender and food.</td></tr>
<tr><td colspan="5">Christian Stenbak Larsen´s main area of interest and professional experience lies within how consumer behavior is expressed through food – what we eat and why we choose it. Larsen possess a deep understanding of upcoming food trends that can result in changes of choice of food, how consumers buy food and thus how these changes of choice affect food distribution channels in the future.</td></tr>
<tr><td>8. Christian Alsted</td><td>Owner and Consultant, Alsted Kvalitativ Markedsindsigt Director until March 2012, Millward Brown Alsted Research</td><td>PhD</td><td>Director, Consultant and former Assistant Professor for Market Economy at Copenhagen Business School. CEO of own research company - Alsted Research A/S, for 20 years (under Millward Brown Alsted Research since 2009)</td><td>Research within retail distribution channels and consumer insights and behavior.

Consumer motivations, and consumer shopping patterns

Branding</td></tr>
<tr><td colspan="5">Christian Alsted is the most experienced consultant participating in our interviews. Not only he has a strong theoretical background within our quest of relevant insights, but his profound knowledge about retail distribution channels, consumer shopping patterns and motivations are highly relevant expertise in</td></tr>
</table>

order to enlighten future trends that can influence consumers' choices.				
9. Klaus G. Grunert	MAPP, Århus University	PhD	Professor Director of MAPP	Consumer behavior and food. Consumers' decision making. Consumer attitudes. Consumer everyday life. Marketing and strategy. Retailing.
Klaus Grunert is Director of MAPP, Centre for Research on Customer Relations in the Food Sector at Aarhus University. MAPP's research focuses on consumer food-related behavior, hereunder i.a. how consumers make decisions and how they shop for food. Grunert thereby holds knowledge about what influences consumers' behavior in their everyday life and how these factors influence their choice of food distribution channels.				
10. Charlotte Elisabeth Mithril	Copenhagen University	MSc in Human Nutrition/Sensory Science	PhD Student, 3rd year	Research project OPUS about Ny Nordisk Hverdagsmad/NNK (New Nordic Everyday Food) Works with Claus Meyer (DK chef guru)
Charlotte Elisabeth Mithril has a profound knowledge about consumers' relation to food and food trends. Mithril thereby has a different and more nutritional profile than the other participants, which is pertinent in order to shed light on consumers' choices from more perspectives. One of Mithril's main occupations is her research engagement in OPUS, NNK, hence she is updated about the latest food trends and how these are expressed in the food distribution channels.				

Appendix 2, Experts not participating in the interviews

Expert name	Workplace	Educational background	Title/profession	Specialities
1. Lars Esbjerg	Århus University, Department of Business Administration	PhD, Århus School of Business, 2004	Associate Professor Previous researcher at MAPP	Is a researcher in the following areas: Food retailing, trade retail, retailer branding, store environments and their symbolic boundaries for consumer choice
2. Thyra Uth Thomsen	Copenhagen Business School, Department of Marketing	PhD	Associate Professor	Consumers' use of health information, symbolic consumption and identity construction, food choice, food retailing
3. Flemming Cumberland	Copenhagen Business School, Department of Marketing	PhD	Associate Professor	Marketing management, international marketing, online grocery shopping,
4. Marcus Schmidt	Copenhagen Business School, Department of Marketing	MSc.	Associate Professor	Consumers and consumer behavior – positioning and product innovation, retail management, market analysis
5. Heidi Boye	Omnicom Media Group Copenhagen Business School, Department of Marketing	PhD	Consultant External lecturer	Consumer behavior and theory, consumer conditions, food consumption, consumer culture theory
6. Mette Skovgaard Frich	Retail Institute Scandinavia	Master of Arts	Editor-in-Chief Senior Consultant	Consumption, trends and concept development, communication, retail marketing strategy

7. Torsten V. Ringberg	Copenhagen Business School, Department of Marketing	PhD	Professor	Consumption and consumer behavior, branding, emotions and subconscious
8. Torben Hansen	Copenhagen Business School, Department of Marketing	PhD	Professor	Consumer behavior and consumer conditions, consumption theory, customer loyalty, market analysis
9. Jon Fuglsang	Metropol, School for bachelors of health and nutrition	PhD	Professor	Brand management, food sociology, consumption and lifestyle
10. Hans Østergaard	Reitan Distribution	MSc in Human Nutrition/Sensory Science	Product Manager	Retail distribution channels, discount retail, product development
11. Hans Stubbe Solgaard	Southern University of Denmark, Department of Environmental and Business Economics	PhD	Professor	Food retailing, choice modeling and choice experiments, market analysis, marketing strategy, E-commerce
12. Niels Kornum	Copenhagen Business School, Department of Marketing	PhD	Associate Professor	E-commerce in FMCG (fast moving consumer goods): resolving of channels conflicts, consumer preferences, distribution solutions, relationship marketing B2C, transaction cost theory, consumer behavior theory
13. Dannie Kjeldgaard	Southern University of Denmark, Department of Marketing and Management	PhD	Associate Professor, Head of research unit: Consumption studies	Marketing management, consumer behavior, branding, consumer culture theory, globalization

14. Bjarne Taulo Sørensen	Århus University, Department of Business Administration	PhD	Assistant Professor	Food trends, future food, consumers as decision makers, functional foods
15. Jesper Aastrup	Copenhagen Business School	MSc.	External Lecturer in the course Retail Distribution Channels	Retail management and distribution channels, Danish retail market, consumer response measures
16. Suzanne C. Beckmann	Copenhagen Business School, Department of Intercultural Communication and Management	Dr. Rer. Soc.	Professor	Marketing and brand management, market analysis, strategic planning, consumers and consumer behavior
17. Jan Møller Jensen	Sounthern University of Denmark	PhD	Associate Professor	Family decision making, consumer purchase on the internet, place marketing, loyalty and satisfaction, consumer decision theory
18. Stig Helgens Binggeli	Brandhouse A/S		CEO	Retail Management, Branding, Consumer behavior
19. Mogens Bjerre	Copenhagen Business School, Department of Marketing	PhD. Strategy and Marketing	Associate Professor	Consumer response measures, consumers, consumer behavior, marketing management, grocery e-commerce, retail management

Appendix 3, Interview 1

Dear expert

The interview on the next page is part of a master thesis in the master programme "Globalization, Brands and Consumption" at Lund University. We thank you in advance for your participation as well as taking the time to help us. It is a very important step in our research process and furthermore crucial in order to conduct and complete our research. Your participation is therefore highly valued by the entire research team.

Please note: Excerpts of the interview might be included as a part of the final report; however your identity will not be connected to any of your answers.

The research aim

The aim of the research is to understand which trends can affect consumers' choice of food distribution channels in the future, more specifically, by the year of 2020.

Food distribution channels are defined as channels such as restaurants, supermarkets, Internet ordering, take away or maybe completely new channels.

Consumer segment

We are focusing on consumers that live in Denmark and are between 12 - 32 years old today, who will be 20 – 40 years old in 2020. The focus is families with children of the upper middle class in Denmark. The upper-middle-class consists of a large part (30%) of the Danish population and has a relative high spending power with a yearly income of DKK230.000-400.000 before tax.

Interview guidelines

You must identify minimum 5 trends that you believe can affect the consumer segment and their choice of food distribution channels. It is important that you direct your gaze well into the future taking into account existing trends, that can change and evolve even further, but we also expect you to consider trends with weak signals that can become relevant to the choice of food distribution channels in the year of 2020.

For each trend you must explain the characteristics of the trend, and the reason for the trend's occurrence. Hereafter you must zoom in on the consumer segment and explain how you believe the trend will influence everyday life and the attitudes of the specific consumer segment in 2020. We want to know in what way the trends will change and affect the everyday routines of the consumer segment.

At the end of the interview you must rank the trends you have revealed after how influential you believe they will be on consumers' choice of food distribution channels in 2020. This you must indicate in the box shown **on the very last page**.

Thank you for your participation!

If you have any questions you are welcome to contacts us:

Louise Bjerregaard: +45 XXXXXXXX**, Trine Schönherr Boyer Thøgersen:** +45 XXXXXXXX**.**

The interviews should be sent to the following e-mail: masterthesisgbc@gmail.com

Trend 1

1.1 Please name the trend, eg. "The health wave"	
1.2 Please carefully describe and explain the characteristics of the trend. **-What is the trend about?** **-How has the trend occurred?**	
1.3 How do you believe this trend influence consumers' daily life routines and attitudes in the year of 2020?	

(This box was repeated 10 times in the e-mail interview)

Ranking of trends

Here you are asked to rank the minimum 5 trends you have identified. You must rank the trends from 1-10, where 10 indicate the most influential trend and 1 the least influential trend in relation to consumers' choice of food distribution channels in 2020. You must not give 2 or more trends the same rank. If you have identified e.g. 6 trends you must rank from 1-6.

"Trend 1" is the first trend you described in the interview. Trend 1, Trend 2, Trend 3 etc. indicate the order of the trends in the interview. If you have identified 6 trends and you believe that Trend 4 has the greatest influence in the year of 2020, you must rank this trend with 6. The least influential trend must be ranked with 1 as shown in the example below:

Trend 1	2
Trend 2	1
Trend 3	4
Trend 4	6
Trend 5	3
Trend 6	4
Trend 7	
Trend 8	
Trend 9	
Trend 10	

In the example above Trend 4 has the greatest influence in 2020, and Trend 2 the least influence. Please rank your trends in the box below.

Trend 1	
Trend 2	
Trend 3	
Trend 4	
Trend 5	
Trend 6	
Trend 7	
Trend 8	
Trend 9	
Trend 10	

Appendix 4, Interview 2

Dear Expert,

Welcome to the second and last round of interviews. Again we thank you for participating in our interviews and your contribution to our master thesis. We have now evaluated your answers from the first round of interviews, and we are very pleased about your valuable findings. Based on the trends you and the other experts revealed in the first round of interviews, we have identified 6 giga trends that appear to be predominant in 2020.

The aim of research

The aim of the research is to understand which trends can affect consumer's choice of food distribution channels in 2020.

Food distribution channels are defined as channels such as restaurants, supermarkets, Internet ordering, take away or maybe completely new channels.

Consumer segment

We are focusing on consumers that live in Denmark and are between 12 - 32 years old today, who will be 20 – 40 years old in 2020. The focus is families with children of the upper middle class in Denmark. The upper-middle-class consists of a large part (30%) of the Danish population and has a relative high spending power with a yearly income of DKK230.000-400.000 before tax.

Interview instructions

Based on the 6 predominant trends we now want you to rank the trends according to their influence on consumers' choice of food distribution channels in 2020. We will provide you with the name of the trend and a short description based on the findings from the first round of interviews. You must assign a total of 100 points between the 6 trends where you assign the highest points to the most influential trend and the lowest points to the least influential trend. You must also argue for your choices in order for us to understand your rankings.

We thank you for your participation!

If you have any questions you are welcome to contacts us:

Louise Bjerregaard: +45 XXXXXXXX

Trine Schönherr Boyer Thøgersen: +45 XXXXXXXX

The interviews should be sent to the following e-mail:
masterthesisgbc@gmail.com

From the first interview we identified 6 predominant trends which you are about to rank. The 6 trends are: A search for authenticity, A healthy life, Ethical and sustainable awareness, Time/Convenience, Price awareness, Automatization

Please rank how **influential** the 6 trends are in relation to **which extent** the trend can affect consumers' choice of food distribution channels in the year of 2020, followed by arguments for your choices. You must assign a total of 100 points between the 6 trends where you assign the highest points to the most influential trend and the lowest points to the least influential trend. . **We want to make clear that it is the influence on the choice of food distribution channels and *not* the choice of specific food products you must take into consideration when ranking.**

Trend 1, A search for authenticity **In 2020 consumers increasingly enjoy the tradition or background stories of products and search for food distribution channels that incorporate a feeling of authenticity.**	
Rank	
Argument	

Trend 2, Ethical and sustainable awareness **Sustainability and responsibility will increasingly affect consumer actions and choice of food distribution channels. They will gradually demand that businesses and co-consumers act in sustainably correct ways.**	
Rank	
Argument	

Trend 3, A healthy life **The health trend will be highly present among the upper-middle class in 2020. Even though consumers have a more realistic view on healthy living than today, healthy product solutions and transparent information are important in the food distribution channels.**	
Rank	
Argument	

Trend 4, Time/Convenience

In 2020 consumers perceive that they are in lack of time and have a stressed everyday life, thus they seek food distribution channels that can help them make their life easier and more convenient.

Rank	
Argument	

Trend 5, Price awareness

Price will continuously be a significant factor when consumers choose food distribution channels, however quality is still evaluated.

Rank	
Argument	

Trend 6, Automatization

Automatization, hereunder the use of internet and mobile will increasingly influence consumers when they shop for food, and will become a large part of the shopping environment.

Rank	
Argument	

Appendix 5, Full list of trends

Expert 1

1. Convenience og tid [Convenience and time]
2. Price
3. Brands – fødevare som selv iscenesættelse
4. Technology
5. Legislation
6. Selvbetjening [Self-service]
7. Groupon, og sweet deal

Expert 2

8. Food miles
9. Locally produced food
10. Less is more
11. Real food- avoiding additives
12. A healthy life

Expert 3

13. Up market convenience
14. Flexitarians
15. Designer foods
16. Food with a (hi)story
17. Eco foot print
18. Supplying the home chef
19. Value for money
20. Restaurant take away

Expert 4

21. Bundling
22. Ansvarlighed [Responsibility]
23. Formattering og skræddersyet løsninger [Customized solutions]
24. Home management system
25. Autencitet [Authenticity]

Expert 5

26. Local Kitchen
27. Inspiration fra Syd Amerika [Inspiration from South America]
28. Sundhedsrealisme [Health Realism]

29. Semi convenience
30. Integration af funktioner [Integration of functions]
31. Nethandel [E-commerce]

Expert 6

32. Polarisering [Polarization]
33. technology
34. Ansvarlighed [Responsibility]
35. Authenticity
36. Products with a story
37. Functional food

Expert 7

38. Increased cost
39. Economic down turn
40. Ageing society
41. Food technology
42. Food as medicine

Expert 8

43. The Nordic food trend
44. The traditional food
45. Transparency
46. The health wave
47. Micro trends

Expert 9

48. Convenience / nemhed
49. Teknologi
50. Det locale [The Local]
51. Pris [Price]
52. Etik [Ethics]

Expert 10

53. Luksus fast food [Luxury fast food]
54. *Store marked mod lille marked* [Small supermarked vs. large supermarked]
55. High vs discount
56. Supermarket size/location

Appendix 6, Gathering and coding of trends

New trend name	Theme	Trend gathering
1. Branding	• Branding of one self, and the family • Self promoting	• Supplying the home chef • Mad er symbolsk [food is symbolic] • Self-branding
2. The Local trend	• Local food • Favoring the Local • Favoring what is near	• Locally produced food • Local Kitchen • The Nordic food trend • The traditional trend • Det Lokale [The Local]
3. Semi-convenience	• Ready to cook food • Healthy fast food	• Up-market convenience • Semi-convenience • Up-market restaurant • Luksus Fastfood [Luxury fast food]
4. Health realism	• More reliastic view on health • The right way of being healthy	• Health realism • Flexitarians
5. Functional foods	• Food that have special benefits • Artificial foods	• Functional foods • Food technology • Food as medicine
6. Transparency	• Knowledge about what the food contains • Food with no	• Transparency • Real food
7. Less is more		• Less is more
8. Customized diets	• Customized diet solutions • Channels offering customized diets	• Healthy life • Skræddersyet løsninger [Customized solutions]
9. Price awareness	• High price awareness	• Pris [Price] • Pris [Price]
10. Value for money		• Value for money
11. Deals		• **Deals/groupon**
12. Polarization		• Polarization
13. Discount vs. high-end	• Consumers shop in both ends	• Discount vs. high end • High-end vs. Low-end
14. Automatization	• The Physical and digital fuse	• Teknologi [Technology] • Teknologi [Technology] • Teknologi [Technology]
15. Self-service		• Selv betjening [Self service]
16. Home management system		• Home management system
17. E & M-commerce		Nethandel [Internet Shopping]

18. Economic downturn		Economic downturn
19. Increased costs		Increased costs
20. Ageing society		Ageing society
21. Ethical & sustainable awareness	• Increasing ethical and sustainable awareness	• Etik [Ethics] • Ansvarlighed [Responsebility] • Ansvarlighed [Responsebility]
22. Eco foot print		• Eco Foot print
23. Convenience/Time	• Time scarcity • Solutions that provide more free time • Solutions that make life easy	• Convenience/ Tid [Time] • Convenience/nemhed [Being easy]
24. Bundling	• Combination of product/services where several services are integrated in one.	• Bundling • Integration af funktioner [Integration of functions]
25. A search for Authenticity	• Shop the old fashion way • Preference toward what is perceived real and sincere	• Autencitet [Authenticity] • Autencitet [Authenticity]
26. Inspiration from South America		• Inspiration fra Syd amerika [Inspiration from South America]
27. A healthy life	• Increasingly strive for a healthier life	• The health wave
28. Micro trends	• Kerne sund familie • Atkins diet	• Micro trends
29. Food with a (hi)story	• Food that has a background story – origins and produce	• Food with a (hi)story • Products with a story
30. Legislation	• Acts • Law	• Legislation
31. Supermarket size	• Location	• Supermarket size
32. Shop acts	• Opening hours	• Shop acts
33. Food miles	• Sustainability • Environment	• Food miles

Appendix 7, Categorization of trends

Giga trend	Shared characteristics	Mega trend related to giga trend
Time/ Convenience	• Convenience • Make it Easy • Time • Ready to cook • Combine	• Semi-convenience • Bundling • Home management system
A Healthy life	• Health • Diet • Additives	• Health realism • Functional foods • Customized diet
A search for authenticity	• Traditional • Local • The Nordic trend • Authenticity	• The local trend • Food with a (hi)story • Self-branding
Legislation	• Law • Legislation • politics	• Supermarket size/location
Price awareness	• Cost • Value for money • Price • Deals	• Value for money • Deals /groupon
Automatization	• Technology • M-commerce • E-commerce • Self service	• The physical and digital world fuse. • Home management system • M/E-commerce • Self service
Polarization	• Polarization • Consumer preference divided between High-end vs. Low end products • differentiation	• High-end vs. low end • Large supermarket vs. Small supermarket
Increased cost	• Increased Costs • Expenses • Wages	• Not found
Ethical /sustainable awareness	• Environment • Being good to the local land • Sustainably correct • Ethics	• Less is more • Eco-print labeling • Fairtrade
Ageing society	• Welfare • Over population	• Not found
Economic downturn	• Unemployment • European currency • Welfare	• Not found

Appendix 8, The 12 determinants in literature review extracted in the literature review

Channel attributes	
Advertisement	Stephenson (1969)
Effort	Balasubramanian (1998), Hansen (2006), McCorkle and Reardon (2002)
Product Assortment	Stephenson (1969, Bearden (1977) Balasubramanian (1998) Brown et al. (2003)
Risk	Hansen (2006), Balasubramanian (1998)
Shopping experience	Bearden (1977), Hansen (2006), Pan and Zinkhan (2005) McCorkle and Reardon (2002),
Quality	Stephenson (1969) Pan and Zinkhan (2005)
Convenience	Stephenson (1969) Balasubramanian (1998), Bearden (1977), Pan and Zinkhan (2005)
Price	Stephenson (1969), Balasubramanian (1998), McCorkle and Reardon (2002), Pan and Zinkhan (2005), Bearden (1977)
Situational	
Friends	Stephenson (1969)
Time /temporal	Gripsrud and Horverak (1986), Gehrt and Yan (2004). McCorkle and Reardon (2002)
Shopping task/purpose	Gripsrud and Horverak (1986) Gehrt and Yan 2004).
Person factors	
Channel experience / complexity	Brown et al. (2003), Hansen (2006)

Appendix 9, Channel Attributes

Effort

Effort: Balasubramanian (1998) discuss effort in terms of sunk cost where she argues that consumers have to make an effort to go to channel and that non-physical channels here have an advantage. McCorke and Reardon (2002) they argue that consumers often switch from one channel to another due to time or effort tradeoffs between channels. Hansen (2006) argue that many choose the Internet as channel because of the less physical effort aspect of the channel.

Product selection

According to Stephenson (1969:60) Bearden (1977:19/21) Brown et al. (2003) Balasubramanian (1998) Gehrt and Yan (2004) can product selection have an impact on the consumers' choice of channels. If one channel does not have the right products naturally another channel will be favored.

Convenience

Convenience are identified by Stephenson (1969:60) Bearden (1977:21) Balasubramanian (1998) which is related to time level one must spent on the act, but is also discussed in terms location how easy or difficult is it to get there.

Price

According to Stephenson (1969:60) Bearden (1977:21) Balasubramanian (1998) McCorke and Reardon (2002) Price is also identified to be a factor that can influence channel choice. Price is not only identified in relation to the products in the channel but also include the price of getting to the channel or the price of freight.

Quality

Stephenson (1969:60) mentions the dependability of the store whereas Bearden (1977:21) discuss the quality of the product. In this we have interpreted Stephenson's (1969:60) dependability as a matter of being able to frequently deliver the right quality. Balasubramanian (1998) also mention quality as a channel determinant also in relation to be able to get the right quality.

Shopping experience

Bearden (1977:21) mention how friendliness of sales people can be a determinant to some consumers and also discuss the shopping atmosphere. McCorke and Reardon (2002) discuss that shopping experience can be a utility and that it can be a determinant in the channel choice. Also Hansen (2006) discuss that the shopping experience can be determinant, especially between physical and non-physical channel.

Risk

Risk was only mentioned by a few researchers and was mostly connected to the non-physical channels. Balasubramanian (1998) mentioned performance risk as a determinant of channel choice. However, Hansen (2006) argue that only those inexperienced with the Internet perceive the channel as risky. He does however, stress that risk relievers online generally can create trust.