U.S. GROCERY SHOPPER

TRENDS 2016

FMI
THE VOICE OF FOOD RETAIL
Feeding Families Enriching Lives

For questions or comments, please contact:

Sue Wilkinson, Senior Director Information Service & Research, Food Marketing Institute

research@fmi.org

T: 202-452-8444

Food Marketing Institute proudly advocates on behalf of the food retail industry. FMI's U.S. members operate nearly 40,000 retail food stores and 25,000 pharmacies, representing a combined annual sales volume of almost $770 billion. Through programs in public affairs, food safety, research, education and industry relations, FMI offers resources and provides valuable benefits to more than 1,225 food retail and wholesale member companies in the United States and around the world. FMI membership covers the spectrum of diverse venues where food is sold, including single owner grocery stores, large multi-store supermarket chains and mixed retail stores. For more information, visit www.fmi.org and for more information regarding the FMI foundation, visit www.fmifoundation.org.

Published by:

Food Marketing Institute

2345 Crystal Drive, Suite 800

Arlington, VA 22202

U.S. GROCERY SHOPPER

TRENDS 2016

U.S. Grocery Shopper Trends

Published by:
Food Marketing Institute

Prepared by:
The Hartman Group, Inc.

Table of Contents

List of Tables

List of Tables

List of Tables

Executive Summary

Introduction

FMI has been tracking the trends of grocery shoppers in the U.S. for more than four decades, taking note of where they shop, how they shop and what issues are most important to them as food shoppers.

In recent years, FMI has tracked trends to unveil a fundamental shift in who shops and why. Formerly the domain of a primary shopper meeting the household's needs, grocery shopping today includes the vast majority of adults, who now often share shopping with their partner. Last year's research uncovered the broad styles of sharing among households and identified challenges that retailers could help shared-shoppers to overcome. Since almost 3 in 5 households (58%) are engaging in some amount of co-shopping, this year we examine shared shopping more deeply from the shopper's perspective. To continue to meet customer needs, stores will need to understand deeply the changing reasons why people shop and why they share.

Channel fragmentation in food retail continues, challenging stores to attract and keep shoppers by accommodating their evolving needs and shopping styles

- Shoppers increasingly rely on a broader number of other shopping channels or claim no retailer as a primary store, prioritizing their needs for the best mix of value, freshness, quality, and discovery
- Beyond growth in occasional use of grocery e-commerce, digital tools are being embraced to plan trips and share food experiences
- Connecting with and retaining Millennial shoppers increasingly requires that retailers find the right mix of online and traditional tools and services

More Americans are sharing in food shopping than ever before, doing so for both practicality and enjoyment

- The vast majority of multi-adult households in the U.S. are engaged in some type of co-shopping, with the rise in co-shopping greatest among men
- Co-shoppers navigate a dual role: shopping for the household with equity and efficiency, while also getting what they want for themselves with indulgence and inspiration
- The path to sharing in shopping is unique for each shopper, guided by the intricacies of age, life stage and household dynamics.
- Young Millennials are particularly notable for their elevated motivations to co-shop because of differing food tastes, driven by independent living for longer and a growing engagement in food culture
- Shoppers themselves often underestimate how much they share, which can prevent them from addressing pain points such as spending more and/or buying more than is necessary
- Grocery retailers must first understand shared shopping at the household level and recognize that it is negotiated differently within each household
- Retailers that curate experiences for both household needs and individual discovery/indulgence needs will be better able to meet evolving shopper needs

Supermarkets are well-positioned within their customers' circle of trust when it comes to food safety and supporting their health and wellness

- Shoppers maintain a high degree of trust and confidence in their grocery store to keep food safe, and they continue to see eating at home as healthier than eating at restaurants
- Consumers' drive for fresh, less processed foods spills over into center store, where shoppers look for product claims that signal minimal processing on packaged goods

Retailers have an opportunity to help their customers in their individual health & wellness journeys by being an ally in their culinary journeys as well

Methodology Summary

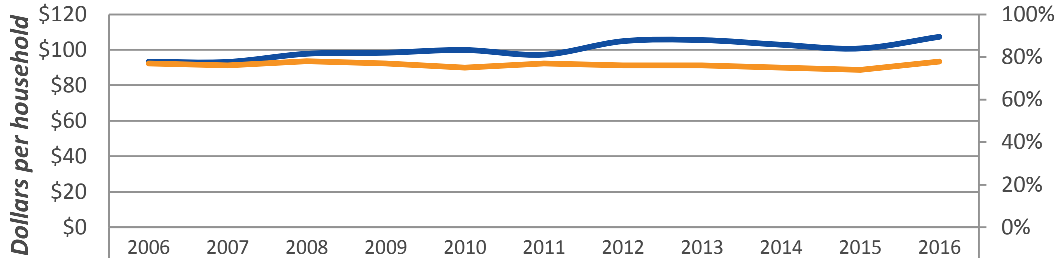
The following report draws on past FMI shopper trends annual surveys while highlighting new insights through a combination of quantitative and qualitative research conducted in the first quarter of 2016. New survey data was collected in the U.S. from a total of 2,061 regular shoppers of groceries, 18 years and older. For deeper context, a mix of in-home and in-store interviews and ethnographies captured insights from a total of 10 consumers from 5 multi-shopper households. Additional analysis was conducted with U.S. Census, USDA and PLMA data sets on consumer spending, health and eating, and 2014-2016 Hartman Group research into eating and shopping.

Food shopping at a glance

ALL DATA FROM FMI U.S. GROCERY SHOPPER TRENDS, 2006-2016

FIGURE E.1: SPENDING

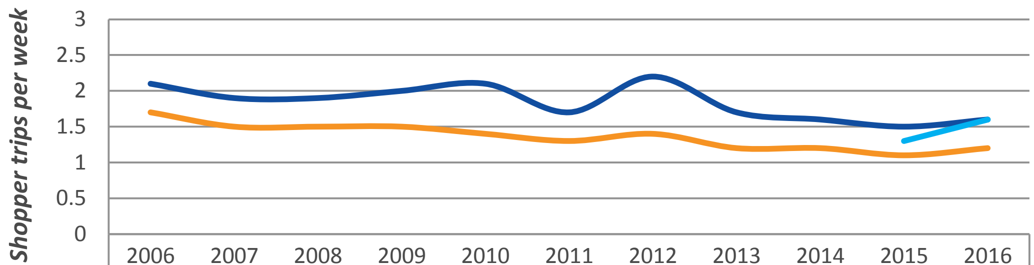
Rise in weekly spending overall and primary store alike.



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Average weekly grocery spending	$93.30	$93.20	$97.80	$98.40	$99.90	$97.30	$104.90	$105.50	$102.90	$100.80	$107.34
Primary store weekly spending	77%	76%	78%	77%	75%	77%	76%	76%	75%	74%	78%

FIGURE E.2: TRIPS

Trips per week per shopper remain stable.



	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Average total trips per week	2.1	1.9	1.9	2.0	2.1	1.7	2.2	1.7	1.6	1.5	1.6
Average trips to primary store	1.7	1.5	1.5	1.5	1.4	1.3	1.4	1.2	1.2	1.1	1.2
Avg. trips for shared shopper	*	*	*	*	*	*	*	*	*	1.3	1.6

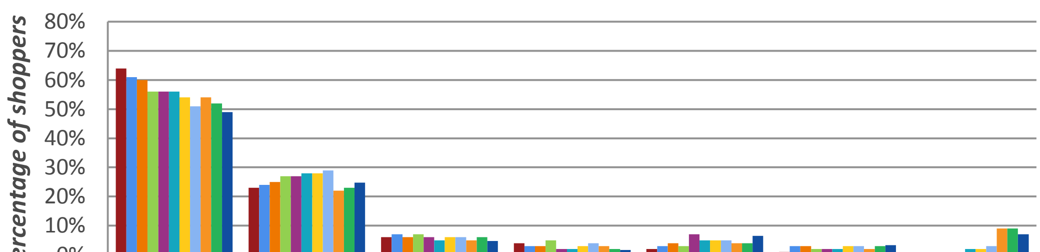
FIGURE E.3: CONFIDENCE

Stable satisfaction with primary store (on 1-10 scale, where 10 is "Excellent"), slight rise in confidence of food safety at grocery.

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Rating of primary grocery store	8.0	7.9	8.0	8.2	8.3	8.4	8.4	8.3	8.2	8.3	8.3
Confident that food in store is safe	85%	66%	81%	83%	86%	88%	89%	83%	83%	84%	86%

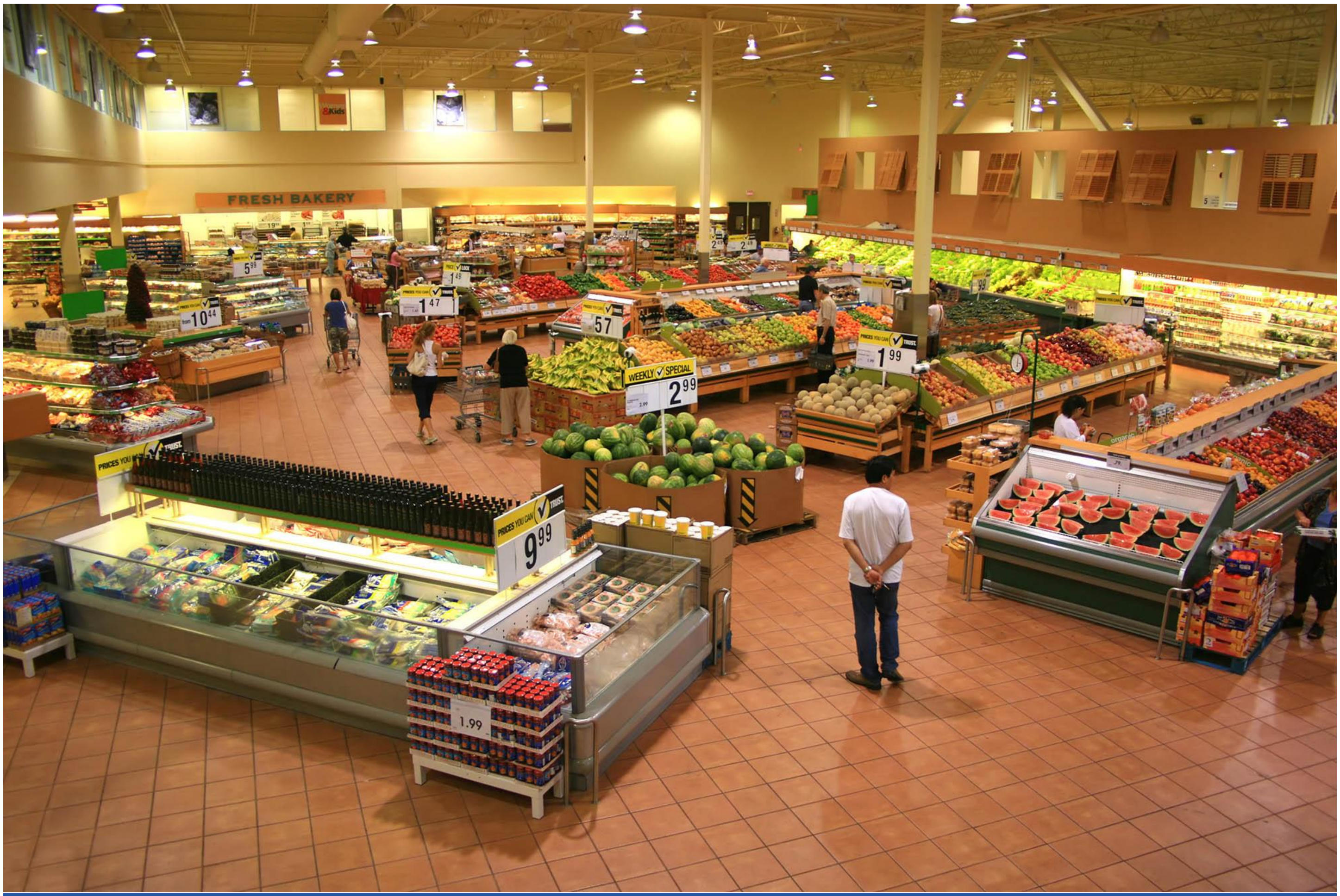
FIGURE E.4: STORE CHOICE

In 2016, supermarkets continue to decline slightly while supercenters recover. Amid a surge of added storefronts, limited assortment stores have nearly doubled their primary store status. Invariably, 7% of shoppers still claim to have 'no primary store.'



	Supermarket	Supercenter	Club store	Discount	Limited Assortment	Organic/ Specialty	No primary store
2006	64%	23%	6%	4%	2%	1%	*
2007	61%	24%	7%	3%	3%	3%	*
2008	60%	25%	6%	3%	4%	3%	*
2009	56%	27%	7%	5%	3%	2%	*
2010	56%	27%	6%	2%	7%	2%	*
2011	56%	28%	5%	2%	5%	2%	2%
2012	54%	28%	6%	3%	5%	3%	2%
2013	51%	29%	6%	4%	5%	3%	3%
2014	54%	22%	5%	3%	4%	2%	9%
2015	52%	23%	6%	2%	4%	3%	9%
2016	49%	25%	5%	2%	7%	3%	7%

Note: Other channels selected as primary store not listed account for a 1% of shoppers in 2015 and 2% in 2016. *Data not collected in previous years.



1 State of the Marketplace

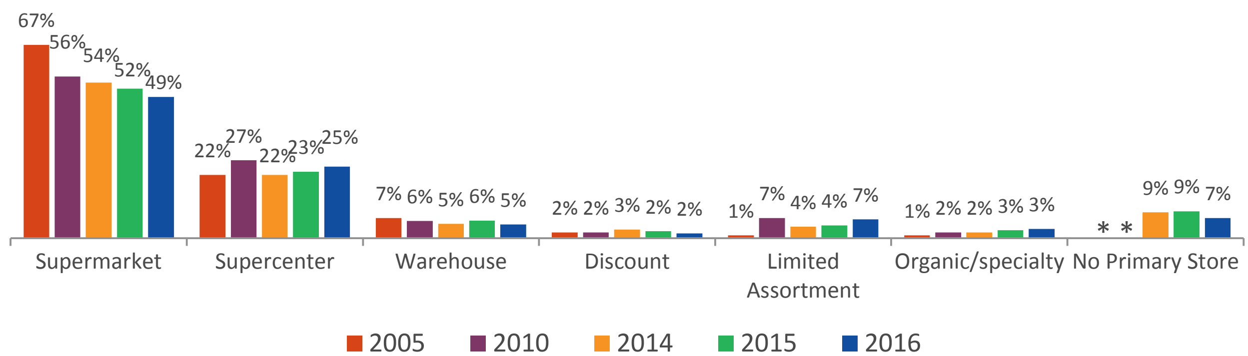
U.S. Consumers navigate a diverse marketplace

Shopping for food in today's evolving landscape of channels and retailers affords consumers an expanding number of choices, allowing them to channel surf without regrets. The market continues to grow in a steady, positive direction, with stable growth in reported weekly trips and spending. However, shoppers are finding ways to be more efficient, get the special products they want and save money on common, everyday items. Tech-savvy shoppers are increasingly using digital tools for exploring, planning and sharing food experiences, cooking and shopping.

Shoppers continue to shop multiple channels

Shoppers today are visiting a broad array of stores to get their shopping done. The last ten years have seen a slow but steady shift of shoppers away from traditional supermarkets as primary store to other channels, such as supercenters, club stores and limited assortment retailers. Notably, in the past 3 years, a significant number of shoppers are no longer claiming any one store as their primary store for groceries (see Chart 1.1).

CHART 1.1: CHANNEL OF PRIMARY STORE



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Which store or service do you consider your PRIMARY source of grocery-type items? In other words, where do you spend the most money on grocery-type items for use in your home?" 2016: n=2,061. *"No primary store" not measured prior to 2011. Other channels (Convenience, Dollar, Drug, Ethnic, Military and Online-only) account for approximately 2% of all primary store channels selected in 2016. Other channels account for 1% of all primary store channels selected in 2015. (See Appendix: Table A.9)

Less traditional channels are attracting more shoppers

Among the non-traditional food retailers, limited assortment and discount retailers are not only seeing an increase in customers (see Table 1.1), they are also attracting a larger portion of shoppers who claim them as their primary store (see Chart 1.1). During this same time, many limited assortment retail chains have increased their market presence, aggressively adding stores across the U.S. As their storefronts increase, limited assortment retailers are becoming an affordable, convenient option for shoppers to get a significant amount of their grocery shopping done.

TABLE 1.1: CHANNEL SHOPPING FREQUENCY

Fairly Often/Almost Always visit	2015	2016
Regular full-service supermarket	86%	85%
Supercenter	48%	54%
Conventional discount store	33%	38%
Warehouse Club store	28%	29%
Limited Assortment	18%	21%
Dollar store	16%	20%
Drug store	17%	18%
Natural + Organic store	14%	13%
Convenience store	5%	8%
Ethnic food store	6%	7%
Online-only food store	5%	5%

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When you need grocery type items, how often do you shop in-person or online at each of the following?" n=2,061. Red boxes indicate year over year increase significant at p>.05 level. (See Appendix: Table A.7)

Half bypass their closest store, typically for lower prices

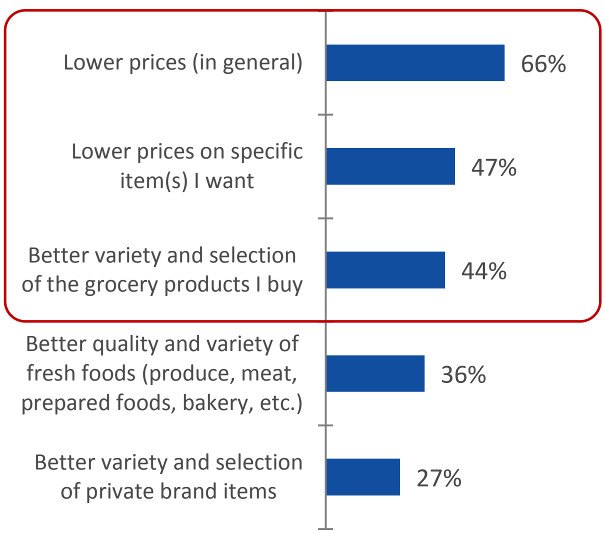
For some shoppers, their "primary store" is a matter of proximity, but for others, it's worth travelling farther to get what they want. In this new, disaggregated environment, what can retailers do to attract or retain greater loyalty? Many strive to create distinctive offerings through something other than price alone. Shoppers hint that they may be tempted away by stores offering better quality and variety of fresh foods.

When asked what would make them drive farther for a primary store, shoppers confessed, as expected, that better prices would motivate them to make the trip (see Chart 1.3). However, low prices are less relevant if they aren't paired with better quality and selection of fresh foods.

"I want to eat healthy, fast and convenient. That's why I love [my store]. It makes fresh and organic affordable. I'd shop there more often if there was one near us."

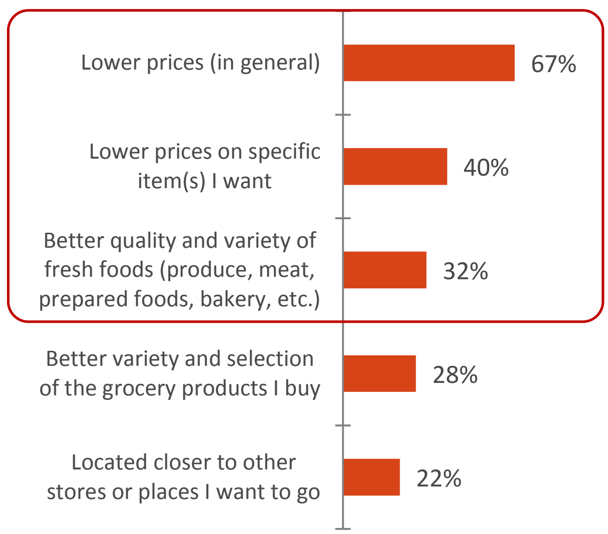
Dana, 37

CHART 1.2: TOP PRIMARY STORE ATTRIBUTES AMONG SHOPPERS WHO CLAIM THEIR PRIMARY STORE IS NOT THE CLOSEST TO THEIR HOME *(52% OF SHOPPERS)*



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "You indicated that your primary store is not the most conveniently located to you. For which of the following reasons do you primarily shop at this store (instead of the one that is closest)? (Select all that apply.)" n=2,061. (See Appendix: Table A.11–12)

CHART 1.3: TOP ATTRIBUTES REQUIRED FOR SHOPPERS TO CHANGE PRIMARY STORE FARTHER AWAY *(48% OF SHOPPERS CLAIM THEIR PRIMARY STORE IS CLOSEST TO HOME)*



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "What would get you to switch from your primary store to a store that was a bit further? (Select all that apply.)" n=2,061. (See Appendix: Table A.11–12)

Food for Thought:

With more channels to choose from, shoppers are increasingly seeing value in non-traditional retail outlets for their groceries. Food stores are not appraised by the prices they offer alone. Retailers can distinguish themselves by the quality and variety in their fresh departments.

Private brands deliver on fresh

More shoppers purchase private brands when shopping for fresh-perimeter items such as produce, dairy, meats and fresh baked goods than other categories. Nearly 6 in 10 shoppers opt for private brands when purchasing packaged and canned foods (see Figure 1.1). However, when it comes to pet care, health & beauty, cleaning products and highly branded categories like sweets and snacks, shoppers are more likely to choose a national brand instead.

FIGURE 1.1: TOP AND LEAST PURCHASED CATEGORIES FOR PRIVATE BRANDS

TOP PURCHASED CATEGORIES

65%	Fresh produce
62%	Milk or non-dairy substitutes
61%	Fresh bakery items
60%	Fresh meats and seafood
58%	(tie) Packaged/canned foods
	(tie) Refrigerated dairy foods

LEAST PURCHASED CATEGORIES

28%	Pet food or treats
30%	Health and beauty care products
36%	Household cleaning products
37%	Sweets
40%	Salty snacks

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Thinking about private label or store brands at your grocery store, how often do you purchase private label/store brand...? (Top-2 Box: Fairly often/Almost every time.)" Results are proportion of shoppers who purchase private brand versions when shopping category. n= varies (67-979). (See Appendix: Table A.35)

Fresh meats and dairy top performers for private brands

According to the Private Label Manufacturers Association (PLMA), shoppers are buying private brands most often when shopping for milk, fresh meats and other dairy items (see Table 1.2). The largest overall drivers within the dairy categories are fresh milk and eggs. Retailers have an opportunity to use private brands as a way to differentiate on quality and deliver on consumer demand for products that align with their health & wellness goals, creating a halo for that retailer.

TABLE 1.2: TOP CATEGORIES FOR PRIVATE BRAND SHARE OF UNIT SALES

FOOD CATEGORY	2015 Market size *(in million $)*	2015 Market share for Private Brands
Milk or non-dairy substitutes	$10,932	60%
Fresh meats and seafood	$3,397	40%
Refrigerated dairy foods (such as cheese, butter, eggs, yogurt)	$26,703	36%

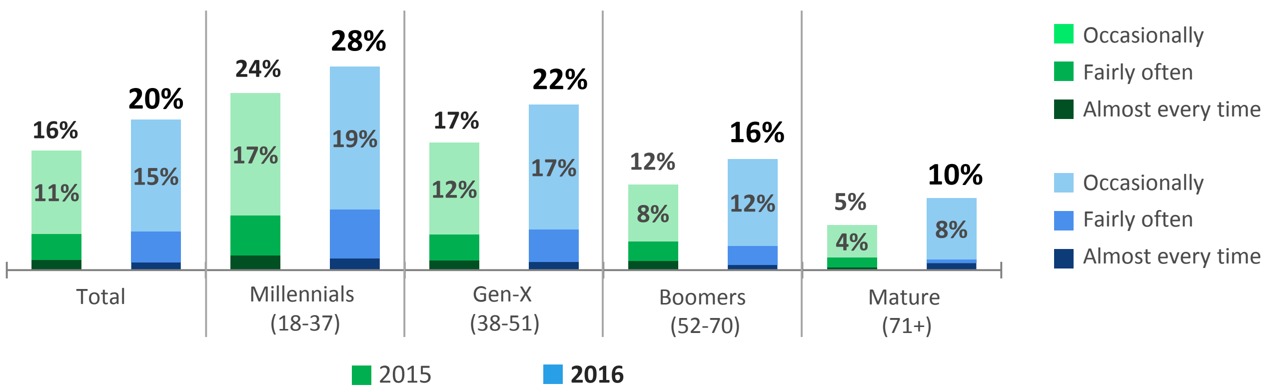
Source: PLMA, 2016.

Food for Thought:
When shoppers think about what makes a store distinctive, they often conjure the fresh-perimeter experiences. Private brands should be integrated into this larger strategy of a distinctive fresh offering to compete with emerging channels.

Online-only retailers contribute to channel fragmentation

Although it represents a small portion of total sales in groceries, more shoppers are reporting they are buying groceries from online-only retailers. Nearly all of the growth is among occasional shoppers – 15% occasionally shop for groceries online, compared to only 11% last year (see Chart 1.4). With more shoppers experimenting with the online channel as a resource for groceries, online retailers are attracting more of the traffic they need to grow their business.

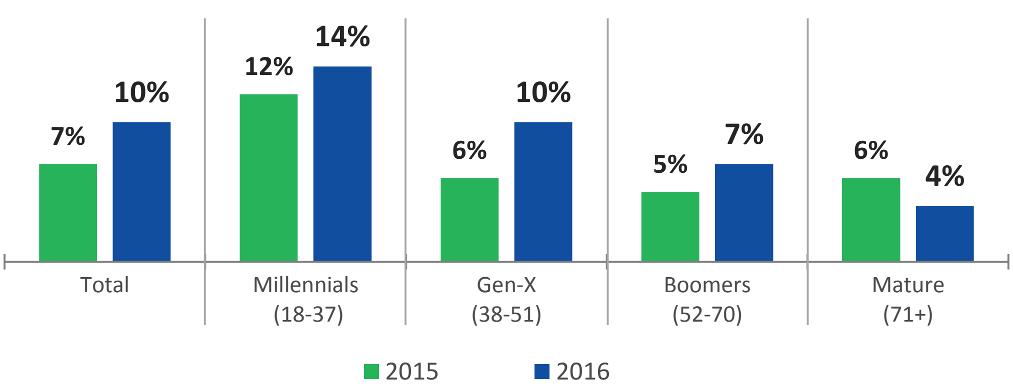
CHART 1.4: FREQUENCY OF ONLINE GROCERY SHOPPING, TRENDED BY GENERATION



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When you need grocery-type items, how often do you shop in person or online at each of the following? (Online-only stores.)" 2016: n=2,061. 2015: n=2,265. (See Appendix: Table A.7)

One in ten shoppers reported shopping an online channel for groceries in the past 30 days, up 3 percentage points from last year (see Chart 1.5). The data also suggests this trend will continue into the future as the youngest generation, Millennials, are the most active group in online grocery shopping. More than 1 out of every 4 Millennials are shopping for groceries online, and 14% have received an online order of grocery-type items in the past 30 days (see Chart 1.5).

CHART 1.5: PAST 30 DAY USAGE OF ONLINE GROCERY, TRENDED BY GENERATION

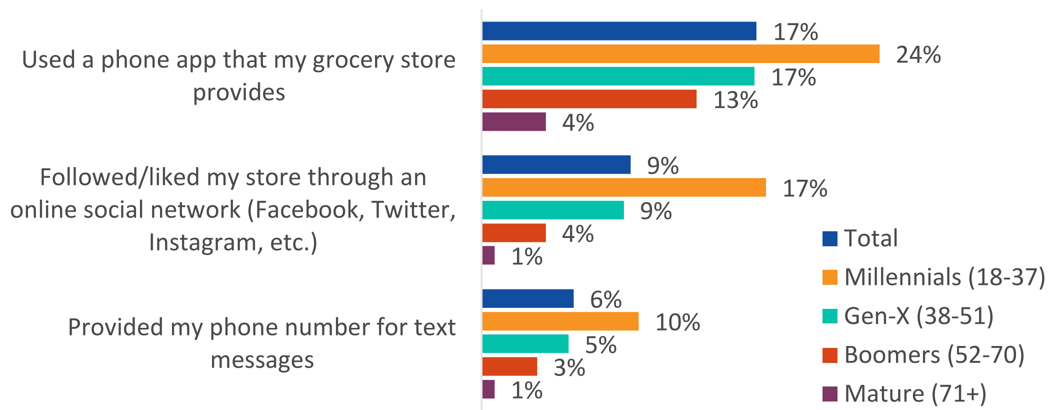


Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Please indicate the sources where you've purchased grocery-type items, either in person or online in the past 30 days. (Online channel.)" 2016: n=2,061. 2015: n=2,265. (See Appendix: Table A.8)

Online tools are a significant resource for pre-shop activities

Online shopping for groceries may still be relatively small, but shoppers are using digital tools prior to and during shopping trips. Millennials are most likely to engage with retailers using social media or other digital tools, such as apps (see Chart 1.6).

CHART 1.6: DIGITAL TOOLS SHOPPERS USE TO ENGAGE WITH RETAILERS, BY GENERATION



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "In which of the following ways have you engaged with a supermarket or grocery store in the past 12 months?" n=1,005. (See Appendix: Table A.17)

Digital is becoming an indispensable part of food culture and modern shopping

Shoppers are using digital tools to explore and be better informed about food, shopping and cooking. Whether it's a vicarious activity or inspirational pursuit, shoppers are connecting with cooking and food through digital – nearly half are regularly looking up recipes online, an activity that is even more popular among Millennials (see Table 1.3). Additionally, many shoppers are looking up store specials online and opting to use digital coupons to help them maximize their food budget.

TABLE 1.3: SHOPPER ACTIVITIES USED OCCASIONALLY/FREQUENTLY VIA SMARTPHONE, BY GENERATION

Shopper Online Activities: *Occasionally/Frequently*	Total	Millennial	Gen-X	Boomer	Mature
Use digital coupons	49%	**59%**	45%	44%	18%
Look up recipes	47%	**66%**	47%	24%	8%
Check weekly sales specials at your primary store	46%	**55%**	41%	41%	25%
Read reviews of products and brands	32%	**41%**	31%	22%	17%
Scan QR codes or traditional barcodes of grocery type items to compare pricing across stores (for example, with Amazon)	23%	**29%**	22%	15%	10%
Use the in-store item locator	21%	**29%**	19%	15%	7%
Scan QR codes or traditional barcodes of grocery-type items to learn more about their nutritional value	20%	**23%**	19%	18%	13%

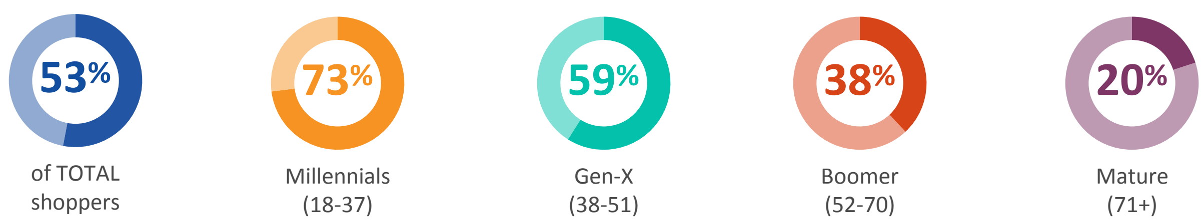
Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "While at the grocery store, how often do you use each of the following with your smartphone? (Top-2 Box)" (Among shoppers with smartphones) n=731. (See Appendix: Table A.36)

Facebook, Pinterest and Web searches are the most common portals consumers use to engage with food culture

About half of all shoppers engage with food digitally through social media — especially younger generations (see Chart 1.7). Millennials lead the charge in terms of use of social media during pre-, during and post-shop. They use social media to discover, share, make and trade new food ideas and connect with their friends and families.

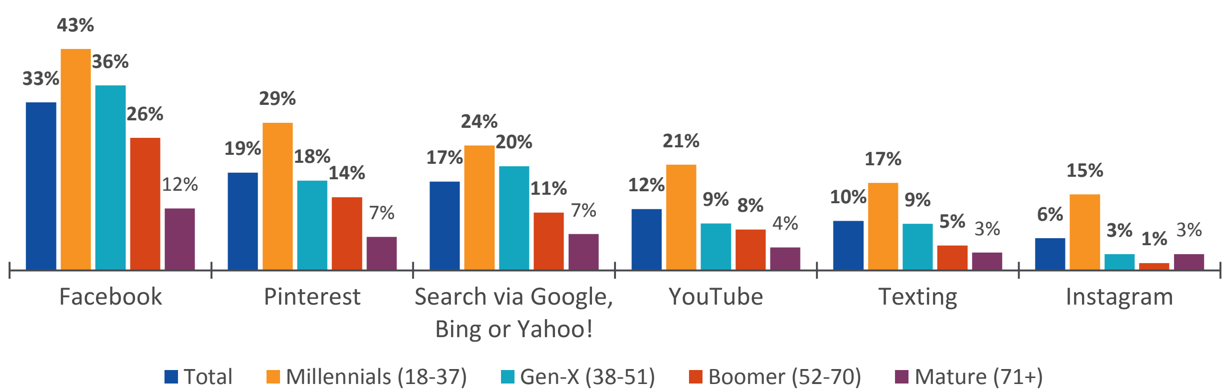
> ***"I use Pinterest as my shopping list because I always have my phone and I can see the dishes I've already made and ones I want to make"***
>
> ***Hillarie, 25****

CHART 1.7: SHOPPERS WHO PLAN, SHOP AND EXPLORE FOOD CULTURE THROUGH SOCIAL MEDIA, BY GENERATION



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Thinking about all the ways you plan, shop for, enjoy and share food experiences, which of these social networking and other tools have you used for something food-related at least once a month?" n=1,005. (See Appendix: Table A.18)

CHART 1.8: FORMS OF SOCIAL MEDIA REGULARLY USED TO SHARE FOOD EXPERIENCES, BY GENERATION



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Thinking about all the ways you plan, shop for, enjoy and share food experiences, which of these social networking and other tools have you used for something food-related at least once a month?" n=1,005. (See Appendix: Table A.18)
*The Hartman Group, Digital Life 2014 ethnographic research.

Food for Thought:
Having a smartphone radically transforms the way shoppers interact with stores while shopping. Now in the palm of their hand, shoppers can compare brands, ingredients and prices. They can look up what they don't know and discover new ways to use ingredients and products.

How are food stores engaging with shoppers digitally? Does it line up with how shoppers are engaging with food culture?

2 From Fairness to Freedom: Exploring Co-shopping

More Americans are sharing in food shopping than ever before

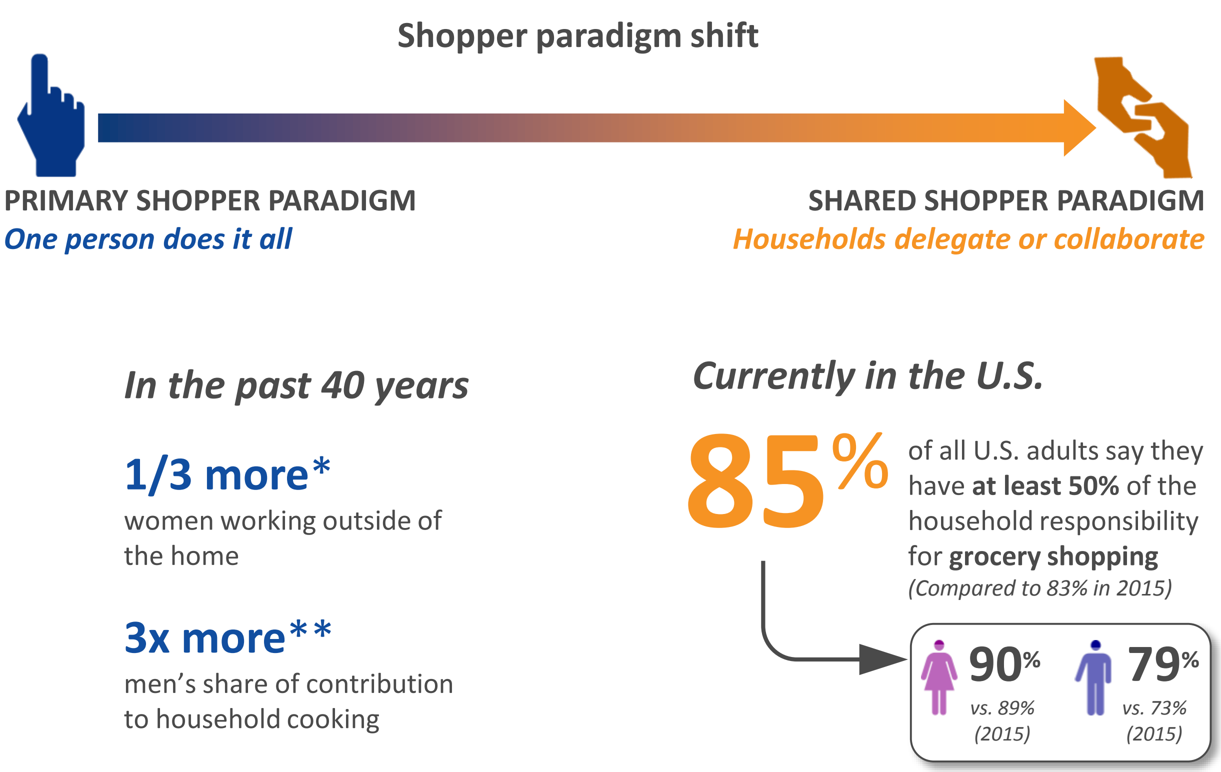
As households evolve towards greater equity, cooking and food shopping is becoming increasingly gender neutral. Tastes and preferences are increasingly fractured, and more adults are participating in the pursuit of getting what the household needs while indulging in personal wants. Both macro forces and food culture are driving a shift from a Primary shopper paradigm to a Shared shopper paradigm, where households delegate or collaborate. While sometimes adding challenges in coordination efforts, this new paradigm of shared shopping affords shoppers greater opportunity for freedom and discovery. Retailers have increasing opportunities to impact a wider variety of shoppers and household needs by curating shopper discoveries that fill a broader set of household needs.

Modern families are sharing in the endeavor to manage food and shopping

Our society has been redefining shifting traditional gender roles that not only change the face of the labor force of enterprise but has also been realigning the labor force within our homes. There are one-third more women in the workforce, causing a change in household labor dynamics. More men are bridging the gap by increasing their contributions in the home. In the past 40 years, men have tripled their share of contribution to cooking for the household (see Figure 2.1).

The way we manage our household labor, such as shopping for food, and the choices we make are shaped by our individual and collective needs and values. As a result, everyone is pitching in. In the past, households primarily relied on one person to do all the food management from shopping to cooking. Today, 85% of all U.S. adults play a significant role in food shopping — reporting they are responsible for at least 50% of the grocery shopping for their household. Men continue to drive the rise in overall shoppers. This year, 79% of all adult men are significant grocery shoppers in their households, up from 73% just last year. This shift over time has contributed to more households moving from a Primary shopper paradigm, where one person does it all, toward a Shared shopper paradigm, where the shopping endeavor is shared between adults in the household (see Figure 2.1).

FIGURE 2.1: SHOPPER PARADIGM SHIFT



Source: FMI U.S. Grocery Shopper Trends, 2016. n=2,061. (see Appendix: Table A.3). *Pew Research Analysis of U.S. Bureau of Labor Statistics, "Women in the labor force: A databook," Table 2, February 2013. **Hartman analysis of time-use data from American's Use of Time Project (1975-76) and American Time Use Study (2007-2008) as reported by Smith et al., Nutrition Journal 2013.

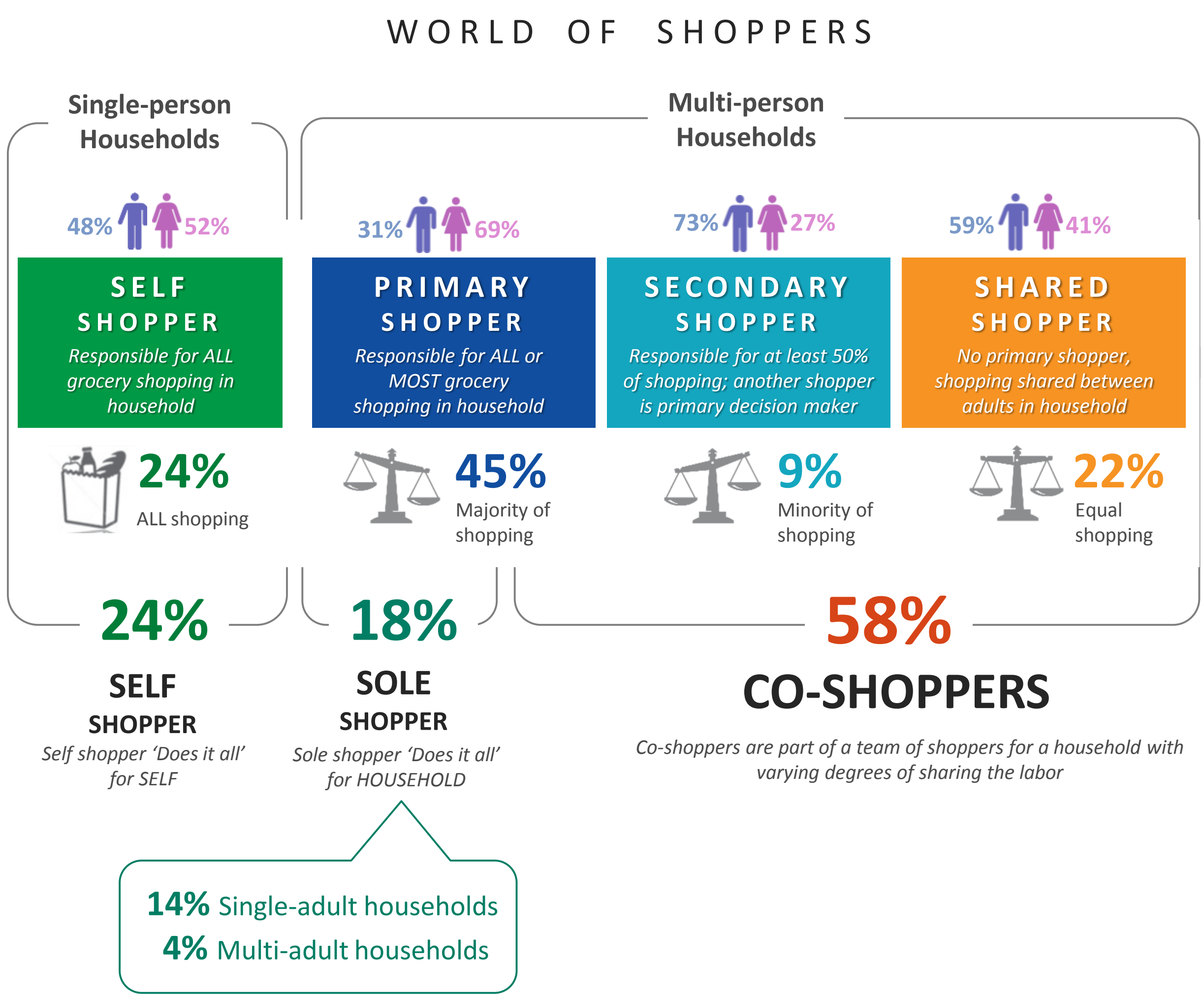
A majority of households are engaging in Co-shopping and using strategies to get what they need

There are many approaches to sharing shopping. Some households delegate, others coordinate and some take shifts of two weeks on and two weeks off. Each has its own solution for its unique situation, but it's clear that more people are involved in food shopping than ever before.

The collective total of shoppers who share or split up food shopping within the household to some degree are Co-shoppers, accounting for 58% of all shoppers (see Figure 2.2). While 22% of households are practicing a Shared shopping approach, equally sharing the responsibility, there are many households that share the responsibility in different proportions. As multi-adult households move toward a Shared shopper paradigm, the relationships between Primary shoppers and Secondary shoppers adjust, with Primary shoppers allowing Secondary shoppers more responsibility until the task is more equitable between them.

Self shoppers and Sole shoppers still 'do it all.' These shoppers either live alone or as single adults in a multi-person household. The most rare shopper is the Sole shopper of a household that has multiple adults, accounting for only 4% of the shopper population (see Figure 2.2).

FIGURE 2.2: WORLD OF SHOPPERS

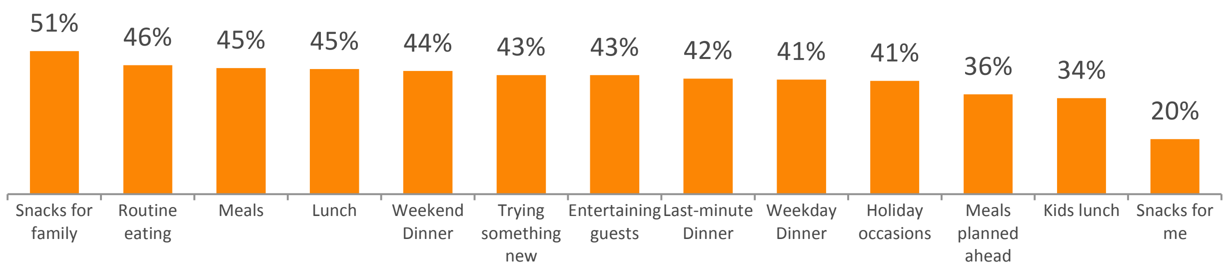


Source: FMI U.S. Grocery Shopper Trends, 2016. n=2,061. (see Appendix: Table A.3)

Co-shopping is a spectrum that ranges from Primary and Secondary shoppers to fully Shared shoppers

When households need to get their food shopping done, it's rarely accomplished by one person alone or even two people equally. In fact, the degree of shopping participation can vary as often as schedules or even budgets change. While shared shopping is a great strategy for households, it's rarely a uniform solution and varies by occasion, category and product needs. Regardless of how the task is split up between shoppers, some shoppers tend to take a primary role in decision making for certain occasions. An indicator of Co-shopper assistance, the vast majority of Primary shoppers co-own at least some types of decisions equally with their Co-shoppers (see Chart 2.1). Still, Primary shoppers share decision-making less often than Shared shoppers (see Figure 2.3).

CHART 2.1: OCCASIONS FOR WHICH SHOPPING DECISIONS ARE SPLIT 'ABOUT HALF AND HALF' (AS A % OF SHOPPERS IN MULTI-ADULT HOUSEHOLDS)



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When it comes to SHOPPING for food, who is most responsible for DECIDING what to get for each of these?" - It's about half and half (in 3-pt scale). n=792 shoppers in multi-adult households. (see Appendix: Table A.37)

FIGURE 2.3: OCCASIONS FOR WHICH SHOPPING DECISIONS ARE SPLIT 'ABOUT HALF AND HALF' (AMONG CO-SHOPPERS)

Primary Shoppers
share decisions equally for **4** types of occasions on average

Shared Shoppers
share decisions equally for **8** types of occasions on average

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When it comes to SHOPPING for food, who is most responsible for DECIDING what to get for each of these?" - It's about half and half (in 3-pt scale). n=792 shoppers in multi-adult households. Median averages given. Means: 4.4 vs. 7.4. (see Appendix: Table A.37)

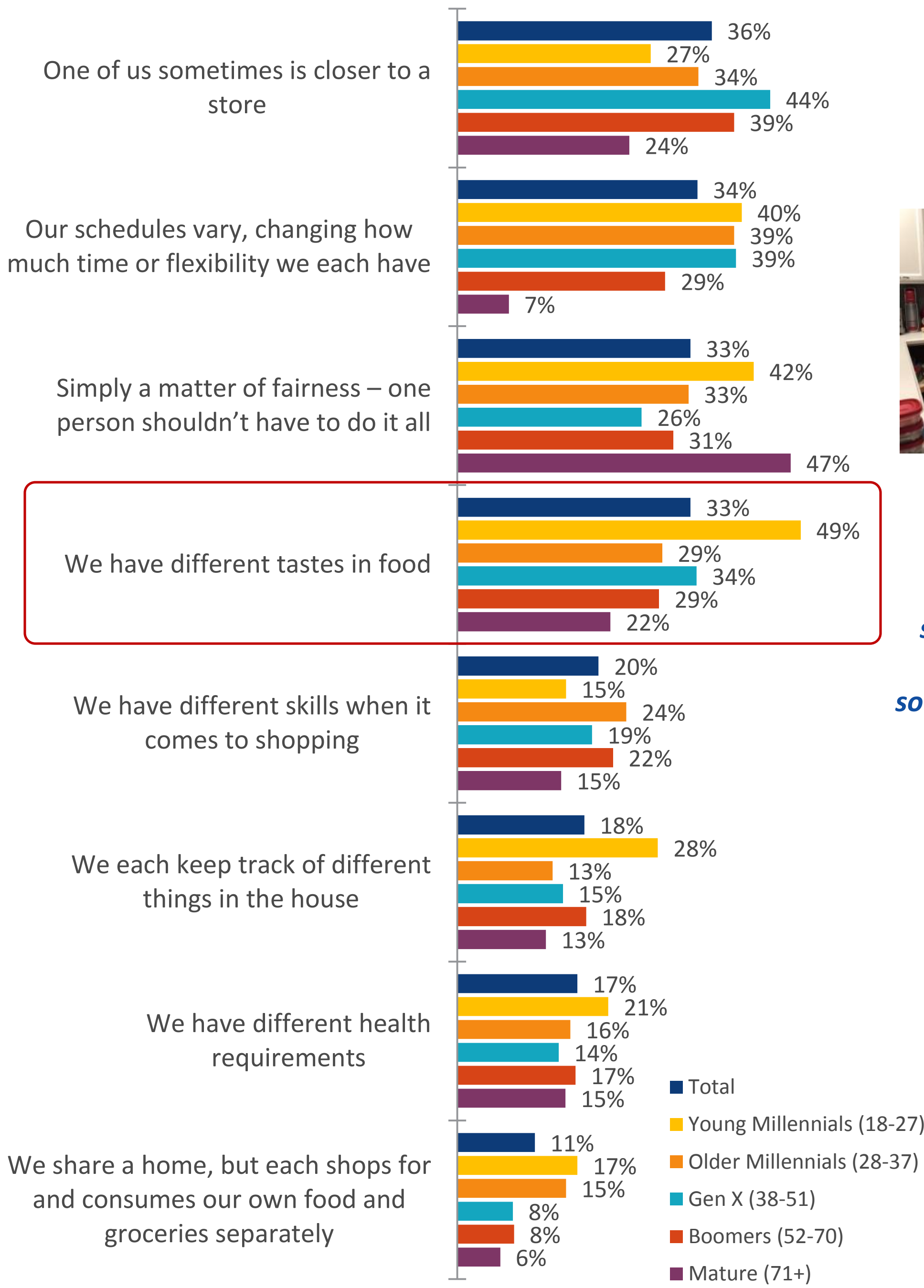
Truly Shared Shoppers and Cooks,

Robert and Itala take turns cooking and shopping during a 2-week cycle with 4 days off to eat out and 1 day off to have the other partner cook. The eater does cleanup. They used to take turns every week but realized they were never fully free of the planning and thinking about food during a 7-day cycle, so they shifted to a 14-day cycle. And it's working well! They share similar values about eating fresh, local, seasonally and plant-centric.

Couples share shopping for efficiency and fairness; many want to fulfill their personal needs and desires too

While most generations describe drivers of co-shopping as being efficient or fair, ethnography reveals that co-shopping is often motivated by a desire to engage in food culture through shopping (see Chart 2.2). Given the very fragmented tastes and food agendas within a household from paleo to vegan, Co-shoppers shop to get exactly what they want and discover new foods to try, especially personal snacks. Young Millennials are unique in their motivations to co-shop because of differing food tastes (see Chart 2.2).

CHART 2.2: REASONS HOUSEHOLDS SHARE RESPONSIBILITY FOR SHOPPING (AMONG CO-SHOPPERS)



Dana wants to eat healthy, fast and convenient, which for her means low-fat salads with hardboiled eggs and vegetarian soups. Joel enjoys eating and would like more variety. He uses the Internet to discover recipes.

Dana, 37 & Joel, 37

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Which of these are important reasons you share responsibility for shopping, instead of one person doing it all? (select all that apply.)" n=642. (see Appendix: Table A.20)

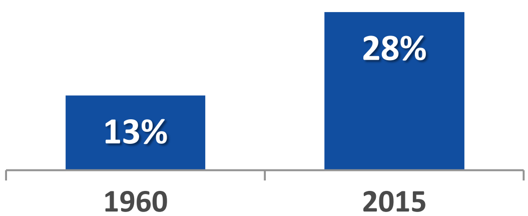
The motivations for sharing shopping are unique for each shopper, guided by the intricacies of age, life stage and household dynamics

Many Co-shoppers started shopping independently, establishing routines, preferences and tastes long before sharing the endeavor with another shopper. These origins of shopping affect how co-shopping is approached in each household.

With more young adults delaying marriage or starting a family, living alone as a life stage has been extended among younger generations (see Charts 2.3 and 2.4). This allows the preferences and tastes of younger shoppers to become more deeply entrenched, requiring more involvement as a future Co-shopper.

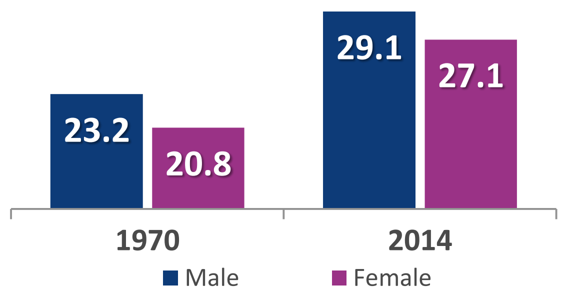
For older generations, co-shopping is a way to create greater efficiency in getting food shopping done. Shoppers pitch in when they are closer to the store or have more time in their schedule (see Chart 2.2). Mature Co-shoppers are more conscientious about sharing the endeavor out of fairness, suggesting that equity in the household is not just a concern among younger generations.

CHART 2.3: CHANGE IN SINGLE-PERSON HHs OVER TIME (AS A PERCENT OF TOTAL U.S. HOUSEHOLDS)



Source: U.S. Census, 1960-2015.

CHART 2.4: MEDIAN AGE OF FIRST MARRIAGE OVER TIME, BY GENDER



Source: U.S. Census, 1970-2014. ACS estimates.

Co-shopping is poised to keep growing

31%

of **Young Millennials** (ages 18-27) are **Shared shoppers,** who share shopping equally

(compared to 22% of all shoppers)

Food retailers should take note of younger Millennials, who are the most dynamic shoppers challenged with the dual roles of household needs and personal wants. When we look at Young Millennials, 31% are Shared shoppers (compared to 22% total shoppers) – indicating that co-shopping may be the future of shopping (see Appendix: Table A.3-B). Their motivations vary from other generations as well – 49% co-shop to accommodate different tastes in food within the household, compared to 33% of total shoppers. Macro forces of household equity are a stronger consideration among younger Millennials – 28% reporting they divide responsibilities in the household compared to 18% of all shoppers (see Chart 2.2).

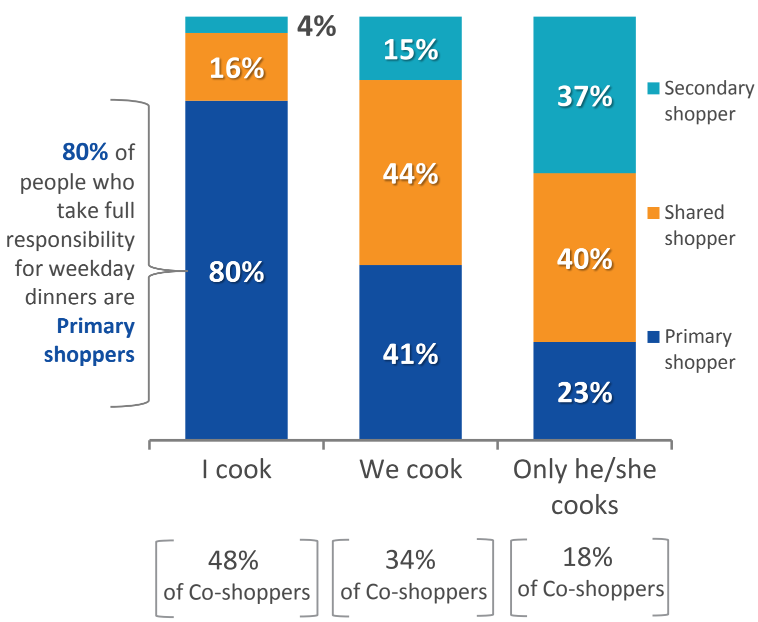
Food for Thought:
Differing tastes among household shoppers require more choices at the store and the ability to get individual needs met while having the flexibility to 'scale-up' for the household.

Ownership of weekday dinner preparation tends to coincide with overall shopping responsibility

Couples may disagree on how much they contribute to shopping, but they agree that 'Primary' shopping aligns with cooking weekday dinners or planned meals.

Members of a couple often disagree about the portion of shopping each takes care of or is responsible for. But when there's clear ownership over weekday dinner preparation, there also tends to be agreement about "Primary shopper" status – the one who solely cooks weekday dinners or planned meals is "Primary," and anyone not involved is "Secondary" (see Chart 2.5).

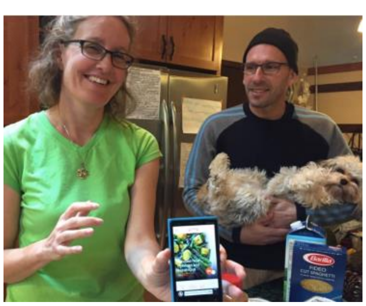
CHART 2.5: SHOPPER INVOLVEMENT IN PREPARING WEEKDAY DINNERS (AS A % OF SHOPPERS IN MULTI-ADULT HOUSEHOLDS)



"I can never ask my wife to pick up my steaks, spices and sauces. I'm the cook of the family, and she doesn't know what I'm looking for. It's not something I can write on a shopping list to pick up."

Dan, 36

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When it comes to PREPARING food, who tends to do the most of the food preparation for these NEEDS AND SITUATIONS?" - Weekday Dinner (Only/Mostly me, It's about half and half, Another person does most/all). Multi-adult HH shoppers, n=792. Regression analysis indicates preparation of "Weekday dinners" and "Meals planned ahead of time" as two most important predictors of overall shopping involvement. (see Appendix: Table A.38)



Ono loves food. He shops when he is cooking or grilling on weekends with friends. He has taken grilling classes to up his game. Leigh did not like food growing up but is now actively studying cooking. She is becoming a more confident cook and, by extension, shopper.

Leigh, 48 & Ono, 46

Co-shopping is often motivated by fun and freedom – enjoyed more when straying from "the list"

All shoppers enjoy straying from the list. Fragmentation of eating often requires co-shopping to fulfill the various needs within a household, and co-shopping affords more people the pleasure of exploring new foods. It is less about a rational economizing approach to shopping and more about discovering new foods and freedom from being confined to "the list." In fact, when couples have to economize, they go back to primary shopper mode to control and monitor spending. With more shoppers participating in the fun side of shopping, opportunities open up for retailers to be curators of fun and exploration.

81%

of shoppers will purchase items that aren't on their list, at least occasionally

51% go 'off list' regularly

Source: FMI U.S. Grocery Shopper Trends, 2016. Q2: "When you grocery shop, how often do you [buy only what's on your list]?" Top-3 Box (Occasionally/Fairly often/Almost every time); Top-2 Box (Fairly often/Almost every time). n=1,056. (see Appendix: Table A.28–31)

Snacks are where all types of Co-shoppers agree – it's a personal endeavor

TABLE 2.1: RESPONSIBILITY OF SHOPPING FOR OCCASION, BY CO-SHOPPER TYPE

Mostly I decide on this occasion	Total	Primary Shopper	Secondary Shopper	Shared Shopper
Average of all occasions	47%	66%	20%	24%
Snacks for me	77%	87%	66%	64%

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When it comes to SHOPPING for food, who is most responsible for DECIDING what to get for each of these? n=792. (See Appendix: Table A.37)

"I buy my own snacks. I stock mission critical items I need like Thai Red Bull. And I have fun seeing what's new to try. Now that I'm back in grad school, snacks really keep me going."

Mark, 48

"When we were on a budget, I did all the shopping because I was really into couponing. Now that we're doing better financially, I'm happy Mark gets his own snacks. That way he gets what he wants and I have one less thing to think about."

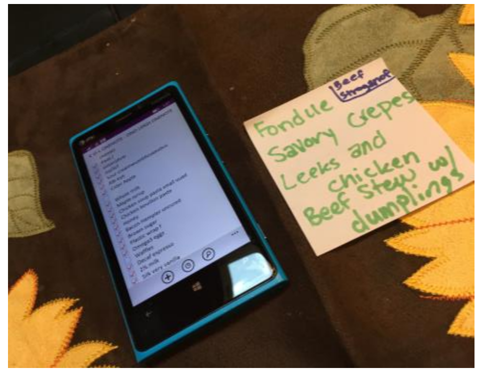
Josephine, 48

Co-shoppers more often rely on intuition and informal communication to coordinate efforts

Co-shopping requires more coordination and negotiation. Calls or texts from the store have become routine. Underlying these behaviors, shoppers speak of the perceived risks of missing out on a needed item, choosing incorrect versions, or getting unneeded items, any of which could lead to an experience or perception of wasted trips, wasted money or wasted food.

Shared shoppers are able to minimize troubles best “in the moment” by communicating just before or during trips through talking and/or texting. Other shoppers do better with ongoing lists, but only a few actually use cloud-based lists (see Table 2.2). However, the need to communicate in the moment to reduce waste suggests that cloud-based lists or tools may be increasingly adopted.

In many cases, taking care of common needs smoothly provides freedom to shop beyond these lists.



Co-shoppers often split lists to get everything the household needs, sometimes coordinating with calls and texts while at the store

TABLE 2.2: METHODS USED BY CO-SHOPPERS TO PLAN SHOPPING, BY SHOPPER TYPE

How shoppers make sure they get what they need from the grocery store	Total	Primary Shopper	Secondary Shopper	Shared Shopper
There are some items we know are always needed	60%	59%	62%	57%
We talk or adjust list right before someone goes to the store	50%	47%	54%	**56%**
The shopper often knows what’s needed without asking	44%	50%	38%	35%
Household maintains an ongoing written list	43%	**46%**	**44%**	31%
We call/text home when at the store	35%	32%	38%	**43%**
We shop based on a recipe that someone can take with them or find at store	15%	15%	17%	12%
Household maintains a list accessible through the Internet	4%	4%	4%	5%
Store helps me track past purchases	4%	4%	4%	4%

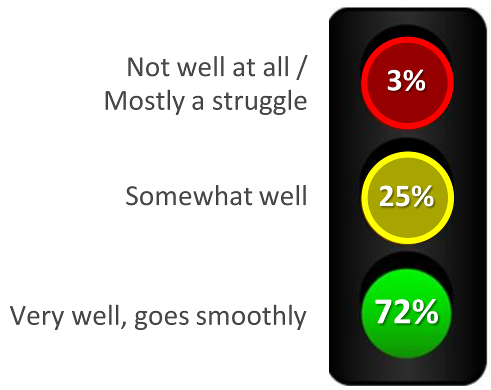
Source: FMI U.S. Grocery Shopper Trends, 2016. Q: “How does your household make sure that needed items are purchased from the grocery store?” n=792 shoppers in multi-shopper households. (see Appendix: Table A.34)

Food for Thought:
As the younger ‘wired’ generations age, the proverbial ‘grocery shopping list’ is poised to go digital in a much more significant way. There is an opportunity to expand the use of digital lists by helping shoppers manage their food post-shop to help reduce food waste. For Co-shopper households, there is a stronger negative emotion associated with throwing away once-good food rather than over-shopping for food. Can retailers help their shoppers understand and adopt such strategies?

Overall, shoppers do not feel co-shopping is a problem

Co-shoppers are applying strategies that seem to work for them most of the time. Basic strategies include splitting the shopping to 'divide and conquer', or joint shopping where they shop together and co-own decisions for items and occasions. To avoid frustration, shoppers will often split the list so specific items will be selected correctly or shop separate channels to ensure that the full list of groceries will be filled. With strategies in place, most shoppers feel that co-shopping is going very smoothly in their household (see Figure 2.4).

FIGURE 2.4: SHOPPER LEVEL OF FRUSTRATION FROM CO-SHOPPING



"My husband doesn't know what kind of bread I use to make the kids' sandwiches. It's a very specific thickness I'm looking for so the bread doesn't overwhelm the cheese and ham."

Josephine, 48

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: Which of these BEST describes your household when it comes to sharing or splitting responsibilities for shopping? Shoppers from multi-shopper HH's, n=642. (See Appendix: Table A.21)

But when there is a problem, it's often about wasted money, trips, food, effort

Shoppers blame their partners for outcomes like wasting money or food more often than point to a deficient or difficult process like tracking needs or division of labor. Increased waste is more likely to happen in Co-shopper households where adults shop more and buy more, often duplicating purchases or buying similar items within a category (such as different styles of yogurt). Shoppers tend to keep track of the foods they purchase, but not necessarily the foods their partners have purchased. More food is wasted because they expire before they're consumed or tossed because of quantity or simply getting buried amongst the clutter in the refrigerator.

FIGURE 2.5: SHOPPER CHALLENGES WITH CO-SHOPPING

32% The other shopper(s) in my household spend(s) more money than they should

25% The other shopper(s) in my household choose(s) the wrong brand/version/item

20% Because we don't know what's needed, we waste trips to the store

20% With more than one managing the food, it's hard to keep track of what we need

10% The way we split things up is unfair

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: Some households face challenges or problems when it comes to splitting up their grocery shopping. How much of a problem is each of these for you? (Top-2 box – Big/Little problem), Shoppers from multi-shopper HH's, n=642. (see Appendix: Table A.22)

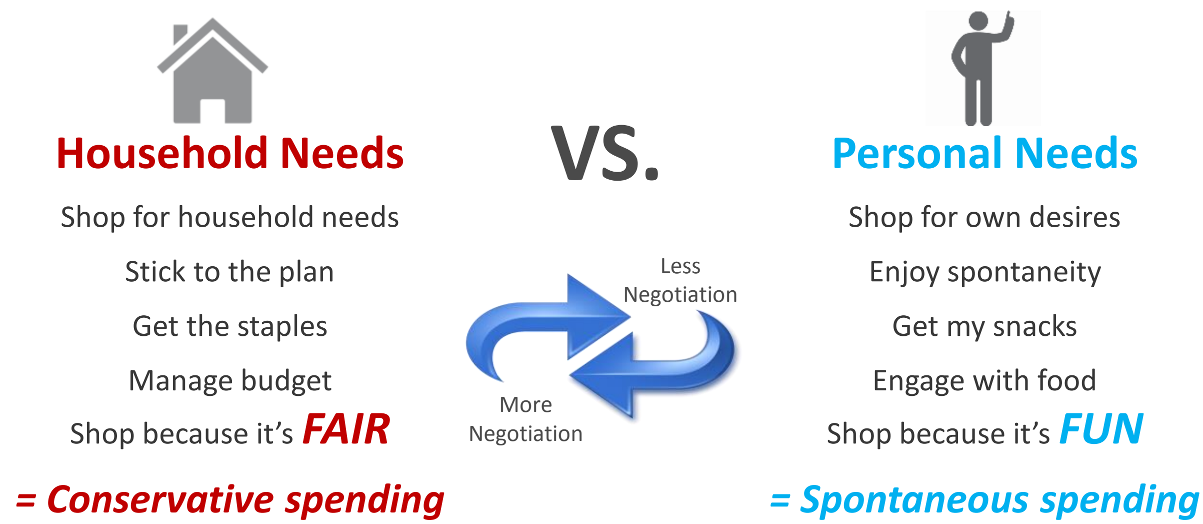
Co-shoppers shop with a dual role and dual mission – each with varying degrees of negotiation

Every trip to the store for groceries affords shoppers the opportunity to get their personal needs met while taking care of the household list as well. Whether motivated by fairness or enjoyment, the shopper who makes the trip gets the final vote on what comes home. This is increasingly important to shoppers who have developed distinct tastes and preferences in an earlier life stage.

Common co-shopping strategies, such as joint shopping or split shopping, are accompanied by varying degrees of negotiation. Joint shopping, or shopping together, often results in more negotiation over what gets in the basket. Split shopping, or shopping done separately, not only reduces negotiation, it often affords shoppers more fun and exploration, resulting in more incremental sales for the retailer from spontaneous spending.

"I want to buy organic in the "dirty dozen," and I don't want to get into a debate why I think organic strawberries are worth the extra cost with my husband."
Kate, 36

FIGURE 2.6: CO-SHOPPERS DUAL ROLE AND DUAL MISSION



Source: FMI U.S. Grocery Shopper Trends, 2016. Ethnographic research.

Food for Thought: The power of bland v. the desire for flavor

Different ideas about what is good to eat create parallel eating tracks within a family and necessitate shared shopping to avoid everyday stress. A shopper who eats from a limited repertoire of foods (e.g., low-fat vegetarian, paleo) may justify their style of eating as "healthier" and thus not be willing to support their partner's efforts to experiment with different recipes, ingredients and flavors. And the shopper who cares about savoring flavors and discovering new foods cannot satisfy their culinary needs with the bland and/or repetitive foods of their partner. This tension of bland v. flavor is further exacerbated by kids who have their own set of picky eating standards.

Accommodating these parallel eating tracks within a family is often too much work for just one shopper. The shift to a Shared shopper paradigm is a reflection of how we eat in America today.

Retailers have an opportunity to be a culinary ally for the household by understanding the broadening tastes that individual households are trying to satisfy.

Shared shopping creates opportunities for retailers to help more people engage in food culture the way they want to

The new reality is that shared shopping is necessary for most households today. Along with its challenges, shared shopping creates opportunities to help more people to engage in food culture the way they want to.

With more shoppers in the household, more decisions are being negotiated and made about what to get. It's not just about 'Pick up milk and bread'… it's choosing what kind of milk and what kind of bread. It's also about where they shop. Shoppers have preferences for different retailers, so whoever is doing the shopping is choosing the retailer, and it's not always the closest store. This can be a challenge for retailers as they compete for the households' business, while also an opportunity to attract more shoppers. If one co-shopper likes a store, it should be easier to convert all shoppers in the household to shopping that store. Understanding that this dynamic exists is the first step a retailer must take to gaining more loyalty.

Co-shoppers continue to look for solutions to their frustrations over managing their food budget, avoiding waste from over-purchase and duplicates. Yet, even as coordination efforts continue to be refined, shoppers today are finding freedom and enjoyment through discovery as they explore food culture while shopping for food. Retailers can most help shoppers by being an ally in their discovery with new coordination tools, curating for shopper culinary journeys and helping them fulfill dual roles and missions at once.

FIGURE 2.7: SHIFT TOWARDS SHARED SHOPPING DRIVEN BY MACRO FORCES BUT ACCEPTED AND SHAPED THROUGH FOOD CULTURE

PRIMARY SHOPPER PARADIGM
One person does it all

SHARED SHOPPER PARADIGM
Households delegate or collaborate

SOCIOECONOMIC DRIVERS

New constraints
- *Dual-earner households*

New living situations
- *Multi-generational households*

New norms
- *Gender equity/fairness*

SHOPPER CHALLENGES

Help us to be fair & efficient
- Communication & coordination
- Budget management
- Food inventory management
- Consolidation of trips

FOOD/CULTURAL DRIVERS

Fragmented eating/tastes
- *Shop for what I want*

Popularized food engagement
- *Fun and exploration in cooking and dining*
- *Quality distinctions in fresh*

SHOPPER OPPORTUNITIES

Help me to have fun & explore
- Fulfill 2 roles/missions at once
- Extend indulgent trips to fill-in, extend fill-in trips to exploration
- Enable me to indulge the people I care for

3 Shopper Trends and Values

Supermarkets are well positioned within their customer's circle of trust when it comes to food safety and supporting their health & wellness

As the consumer trend towards healthier lifestyles continues to grow, shoppers depend on key allies to ensure food is not only safe, but healthy and nutritious. Food retailers are firmly within shoppers' circle of trust, depended on to protect and provide safe, nutritious food.

Food safety serves as a threshold for overall health & wellness

Shoppers in the U.S. shop for food with health & wellness priorities that range well beyond the food safety needs they believe are already mostly satisfied.

With nearly 9 in 10 shoppers having confidence in the safety of food at the grocery store, they are able to focus more of their wellness attention to labels, analyzing nutritional claims and other wellness distinctions. Still, a smaller, yet passionate set of shoppers see wellness as a social or community effort (see Figure 3.1).

Shopper attitudes and aspirations about health & wellness drive the decisions along their path to purchase. Beyond basic food safety, shoppers look for fresh, less processed cues through absence of negatives. More progressive shoppers are seeking positive nutritional attributes and positive connections to where their food comes from (see Figure 3.1).

FIGURE 3.1: HEALTH & WELLNESS CONTINNUUM: FROM FOOD SAFETY TO COMMUNITY WELLNESS

Is my food safe to eat?

86% of shoppers are CONFIDENT that the food they buy at their grocery store is ***SAFE***

Low level of "safety" concerns about:
Germs
Toxins

Does it fit my health needs?

66% seek product claims to AVOID NEGATIVE ingredients implicated in health conditions or concerns

Broad interest in avoiding:
Sodium
Sugar
Trans fats
+ Processing cues

Does it sustain my health?

22% worry that the food they eat isn't NUTRITIOUS enough

26% seek products specifically ENHANCED for nutrition (e.g. vitamins, antioxidants, calcium)

Am I sustaining my community?

14% look for organic certification

Consumers prefer shopping grocery stores they believe…

21% use only sources that treat animals humanely*

29% support the local economy*

Source: FMI U.S. Shopper Trends, 2016. Q: "How confident are you that the food in your grocery store is safe?" (See Appendix: Table A.59). Q: "What health claims do you look for on the package when purchasing a product? (Select all that apply)" (See Appendix: Tables A.48–49). Q: "How concerned are you about the nutritional content of the foods you eat?" (See Appendix: Table A.45). * The Hartman Group. "Transparency", 2015.

Consumers take personal responsibility for ensuring their own food safety

There is a universal belief among shoppers that food retailers can be trusted to provide safe food. A belief that has remained consistent over the past ten years. However, it doesn't preclude the possibility that some food safety problems might make their way onto shelves. Even then, consumers take personal responsibility for ensuring that what they put in their cart at the grocery store is safe.

94%

"[of Shoppers] *TRUST* [their] grocery store to ensure that the food [they] purchase is *SAFE*"

(Compared to 93% in 2015)

Shoppers also turn to other institutions and organizations to protect them from unsafe food. Last year, FMI expanded the definition of government institutions to include the specific organizations of the FDA and USDA and found that shoppers expect more of these organizations in protecting consumers from unsafe food than they do of other organizations (see Table 3.1).

TABLE 3.1: PARTIES SHOPPERS RELY ON MOST TO ENSURE FOOD PURCHASED IS SAFE, 2009-2016

	Year							
Number of Shoppers: n=1,164	2009	2010	2011	2012	2013	2014	2015	2016
Myself as an individual	55%	51%	58%	58%	58%	63%	64%	61%
Food and Drug Administration (FDA)	*	*	*	*	*	*	53%	54%
U.S. Department of Agriculture (USDA)	*	*	*	*	*	*	49%	50%
Manufacturers/Food Processors	33%	29%	35%	37%	38%	38%	41%	42%
Food Stores	25%	29%	28%	32%	36%	42%	41%	40%
Government Organizations	32%	27%	28%	30%	32%	43%	34%	22%
Farmers	8%	10%	10%	15%	19%	19%	23%	21%
Consumer Groups	12%	10%	9%	12%	15%	18%	17%	16%

Source: FMI U.S. Shopper Trends, 2016. Q: "How much do you agree or disagree with the following statement [I trust my grocery store to ensure that the food I purchase is safe]?" Top-2 Box Agree. (See Appendix: Table A.58). Q: "Who do you rely on the most to ensure that the products you buy in your grocery store are safe?" n=1,056-2016; n=1,164-2015; n=1059-2014; n=776-2013; n=1026-2011; n=1001-2010. *"Other" added to 'Government institutions' choice in 2016. (See Appendix: Table A.57)

Consumers believe food safety problems largely originate with manufacturers

While consumers trust food manufacturers and retailers equivalently, they believe that food safety issues are most likely to occur at food processing plants – a belief that increases as shoppers age. Shoppers also believe that grocery stores are the least likely place to have a food-safety problem happen (see Table 3.2).

TABLE 3.2: WHERE CONSUMERS BELIEVE FOOD-SAFETY PROBLEMS OCCUR, BY GENERATION

Where food-safety problems are most likely to occur	Total	Millennial (18-37)	Gen-X (38-51)	Boomer (52-70)	Mature (71+)
At food processing/manufacturing plants	56%	50%	57%	58%	63%
While stored in a warehouse awaiting distribution	9%	11%	6%	9%	7%
In restaurants	7%	6%	10%	6%	7%
At home	6%	8%	6%	5%	4%
On the farm	5%	5%	4%	5%	3%
During transportation	4%	5%	4%	4%	2%
In grocery stores	3%	4%	2%	4%	*
Not sure	11%	11%	11%	9%	15%

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Where do you think food-safety problems are most likely to occur? (please select one)" n=1,056. *Results less than 0.5% of responses. (See Appendix: Table A.61)

Shoppers see both safety and quality risks across all product date label formats

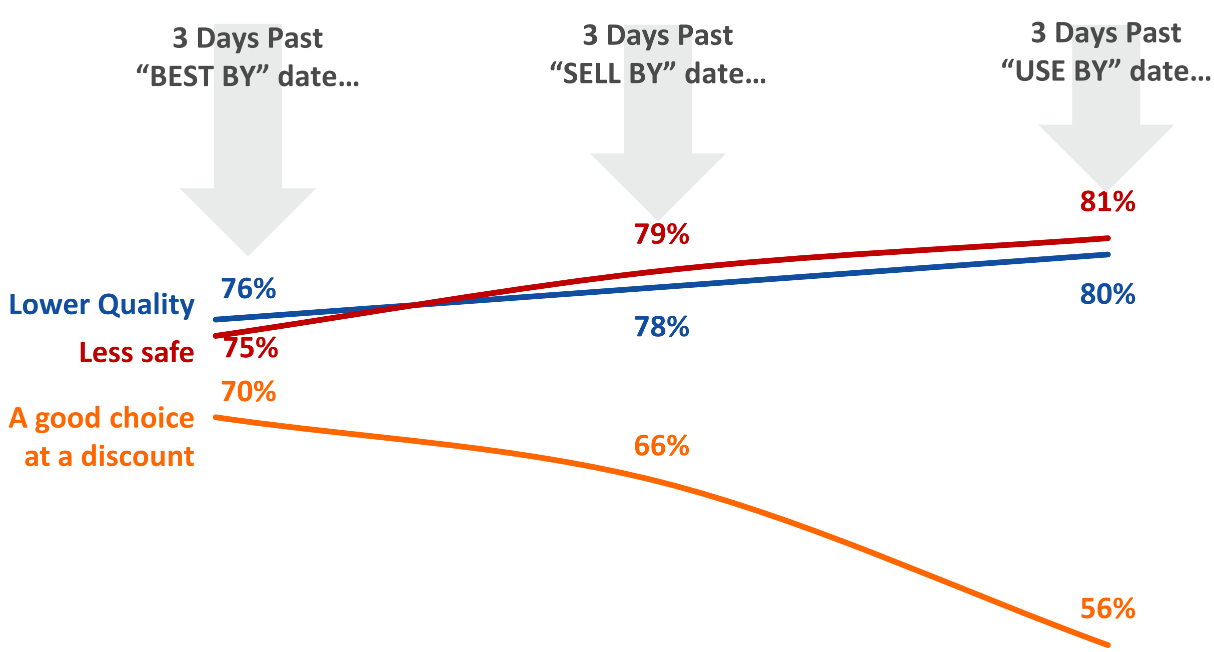
Believing shopper confusion exists over various forms of product date labeling currently in use, this year FMI explored perceptions around the "Best By", Sell By" and "Use By" labels. The goal was to better understand how associations with safety, quality and value vary with the different formats in hopes that a more unified system might be suggested.

> **67%**
> of shoppers consider ***freshness/expiration dates**** important when deciding to purchase an item

Shoppers do perceive differences between the three, with increasing perceived risks to both safety and quality moving from the suggestive "Best By" date to the more directive "Use By" date. However, the most surprising finding here is the high level of safety risk shoppers perceive with all three forms. While many shoppers may consider expired food a good deal at a discount when past its "Best By" date, three in four shoppers also see this food as less safe. The perceived risk to both safety and quality rises to almost 4 in 5 shoppers for "Sell By" and "Use By" dates. The significant drop in willingness to risk foods past their "Use By" date even for a discount suggests that shoppers clearly equate this type of expiration most strongly with a risk to quality and safety (see Chart 3.1).

These findings suggest that consumers actually *are* aware and recognize there are differences among the different kinds of labels. But mostly, shoppers are confused about safety with each of the three. Manufacturers and retailers should consider helping shoppers understand the distinctions between quality and safety.

CHART 3.1: CONSUMER PERCEPTIONS ASSOCIATED WITH VARIOUS PRODUCT DATE LABEL FORMATS



Source: FMI U.S. Shopper Trends, 2016. Q: "Imagine you saw [an expiration date] stamped on a food product… three days past its [BEST BY/SELL BY/USE BY] date. How likely is it that the product would be…?" Top-2 box Somewhat/Very Likely. n=varies (701-708). (See Appendix: Table A.63).

* The Hartman Group *Foodways of Millennials and Gen Z, 2016*. Q: "When shopping for food or beverages, which of the following packaging information is important to you when deciding what to purchase?" (Freshness/Expiration dates). n=1,407.

Shoppers remain confident that food from grocery stores is safe

In a large range of possible risks, eating foods past their expiration dates still rates much lower when compared to other conditions (see Chart 3.2). While most shoppers are confident that the food in grocery stores is safe, many recognize product contamination, whether by tampering or mishandling somewhere along the food supply chain, as much more serious risks to their health.

Among these risks, we see a continuing and increasing concern about the safety of GMOs. More consumers are worrying about perceived health risks associated with GMOs… up 7 percentage points from last year to 54% (see Chart 3.2). Still, consumers see grocery stores as a trusted ally for safety.

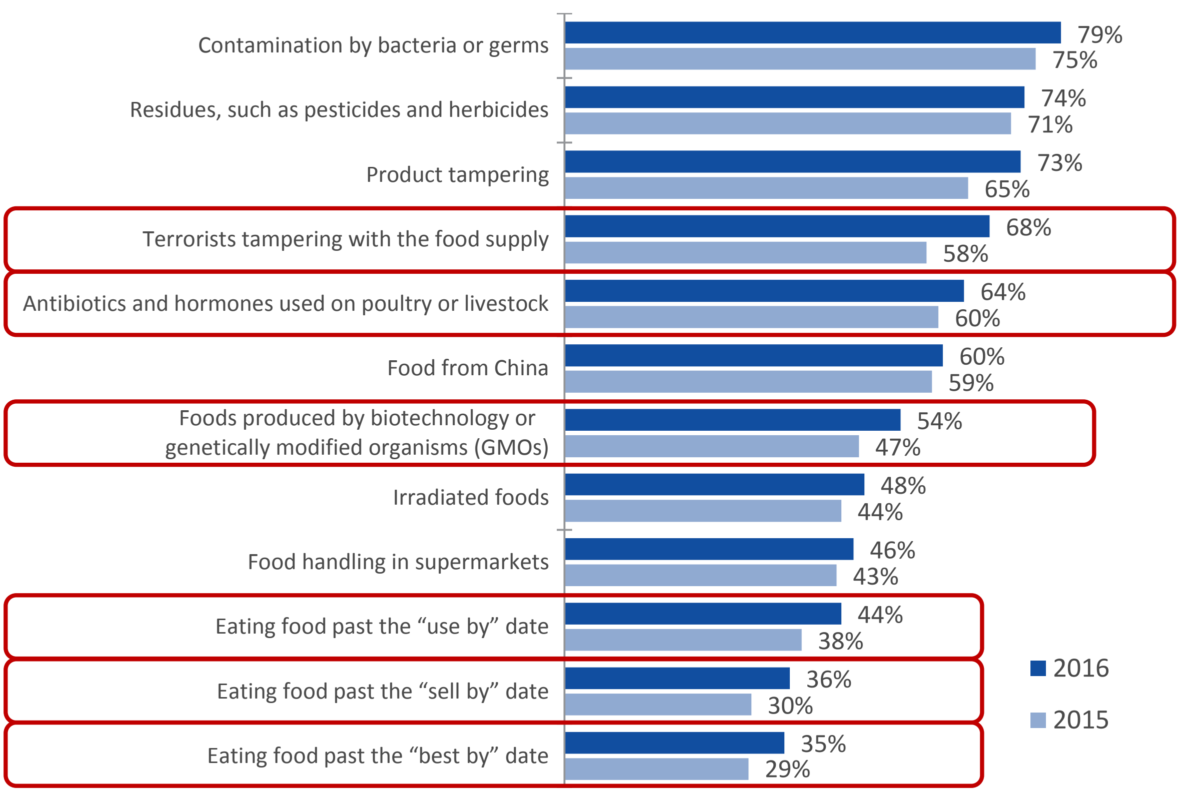
"I trust that the stores make sure the foods are safe. I really don't think about safety much. I've never had to. "

Joel, 37

86% **of shoppers are mostly or "completely *CONFIDENT* the food in [their] grocery store is *SAFE*"**

(Vs. 84% in 2015)

CHART 3.2: FOOD CONDITIONS SHOPPERS BELIEVE POSE SOME/SERIOUS HEALTH RISK

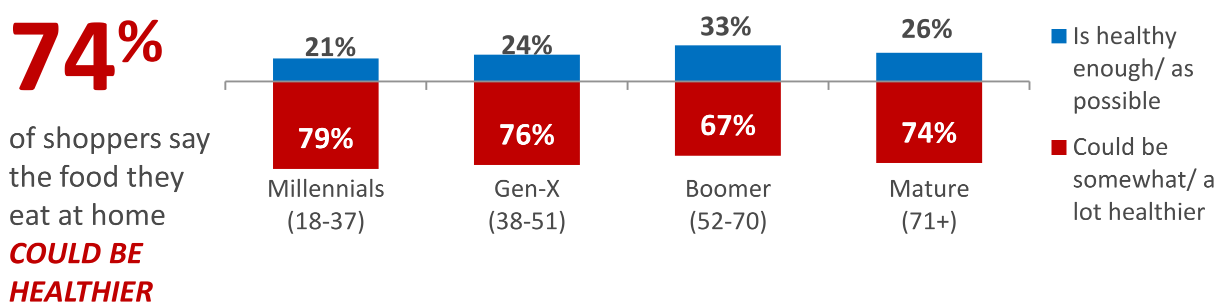


Source: FMI U.S. Shopper Trends, 2016. Q: How confident are you that the food in your grocery store is SAFE? Would you say you are…? Top-2 box "Mostly" or "Completely confident." (see Appendix: Table A.59) Q: "How much of a health risk do you believe each of the following food-related items present?" Top-2 box Some/Serious Health Risk. n=1,056-2016; n=1,164-2015. Items in red boxes indicate year over year results are statistically significant at the p<.05 level. (See Appendix: Table A.62).

As shoppers aspire to healthier diets, many are also managing health conditions

Shoppers today are increasingly aspiring to healthier diets. Today, 3 out of every 4 consumers admit the food they eat could be healthier – up slightly from 71% last year (see Chart 3.3).

CHART 3.3: SHOPPER ASSESSMENT OF AT-HOME EATING, BY GENERATION



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Thinking of all the foods you eat at home, how would you describe your diet? (4-point scale,)" Total n=1,056, Millennials n=322, Gen-X n=295, Boomer n=354, Mature n=85. (See Appendix: Table A.52)

Even as shoppers aspire to eat healthier, many are also trying to manage a range of health conditions (see Table 3.3). Shoppers may have different health concerns at different times in their lives, but *everyone* thinks they can do better.

TABLE 3.3: HEALTH CONDITIONS BEING MANAGED IN HOUSEHOLD, BY GENERATION

Millennials	Gen-X	Boomers	Mature
35% Anxiety or stress	**31%** Anxiety or stress	**22%** Diabetes	**22%** Diabetes
17% Food allergy / sensitivity	**21%** Obesity	**20%** Obesity	**22%** Digestive disorder or frequent heartburn
17% Obesity	**16%** Frequent insomnia/ sleep disorder	**19%** Anxiety or stress	**18%** Obesity

Source: FMI U.S. Grocery Shopper Trends, 2016. Q:"Which, if any, of these health conditions are currently present in your household?" Total n=2061, Millennials n=640, Gen-X n=556, Boomer n=700, Mature n=165. (See Appendix: Table A.56)

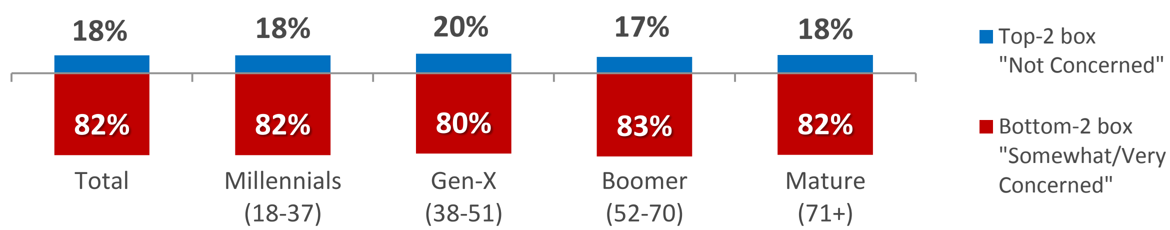
"As my MS symptoms got worse, I decided I need to eat better, cook more and eat more vegetables. That's how I met my partner. She delivered my CSA box to me."

Robert, 42

Broad concern about the nutritional content in food

Nutrition is definitely on the mind of consumers today. Four of every five shoppers express concern about the nutritional content in their food, and this is consistent across ALL generations (see Chart 3.4).

CHART 3.4: SHOPPER CONCERN ABOUT THE NUTRITIONAL CONTENT IN THEIR FOOD, BY GENERATION

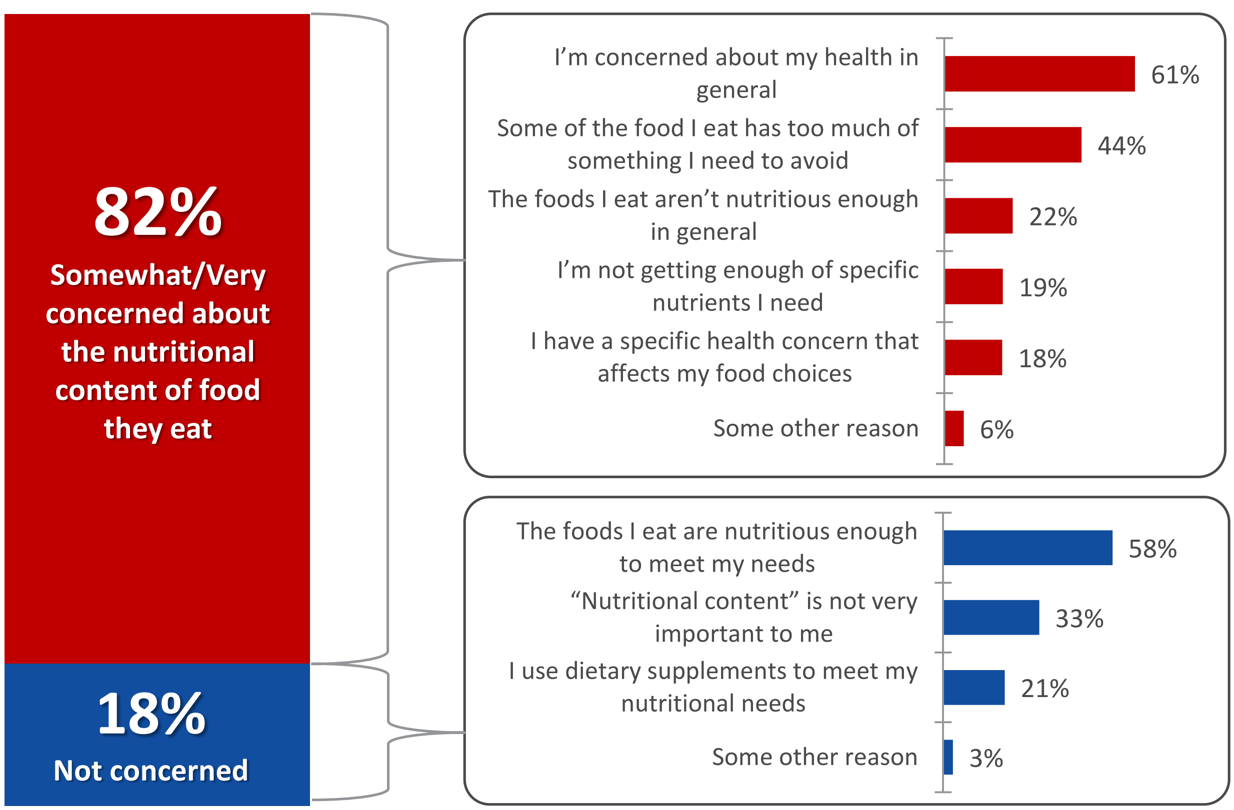


Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "How concerned are you about the nutritional content of the foods you eat?" n=1,056. (See Appendix: Table A.45)

Shoppers cite general concerns about health and food they eat

Among the top concerns, shoppers are focused on their health in general. They are also noticing that some foods they are eating have ingredients they feel they should be avoiding, and some are just not as nutritious as they should be (see Chart 3.5).

CHART 3.5: CONSUMERS' TOP CONCERNS REGARDING THE NUTRITIONAL CONTENT OF FOOD EATEN



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "How concerned are you about the nutritional content of the foods you eat? (Not at all concerned to Very concerned)" n=1,056. Q: "You stated that you are not very/not at all concerned about the nutritional content of your food. Why is that? (Select all that apply.)" n=202. Q:"You stated that you are somewhat/very concerned about the nutritional content of the foods you eat. Why is that? (select all that apply)" n=854. (See Appendix: Tables A.45–46)

"Fresh, less processed" continues to be a priority for shoppers

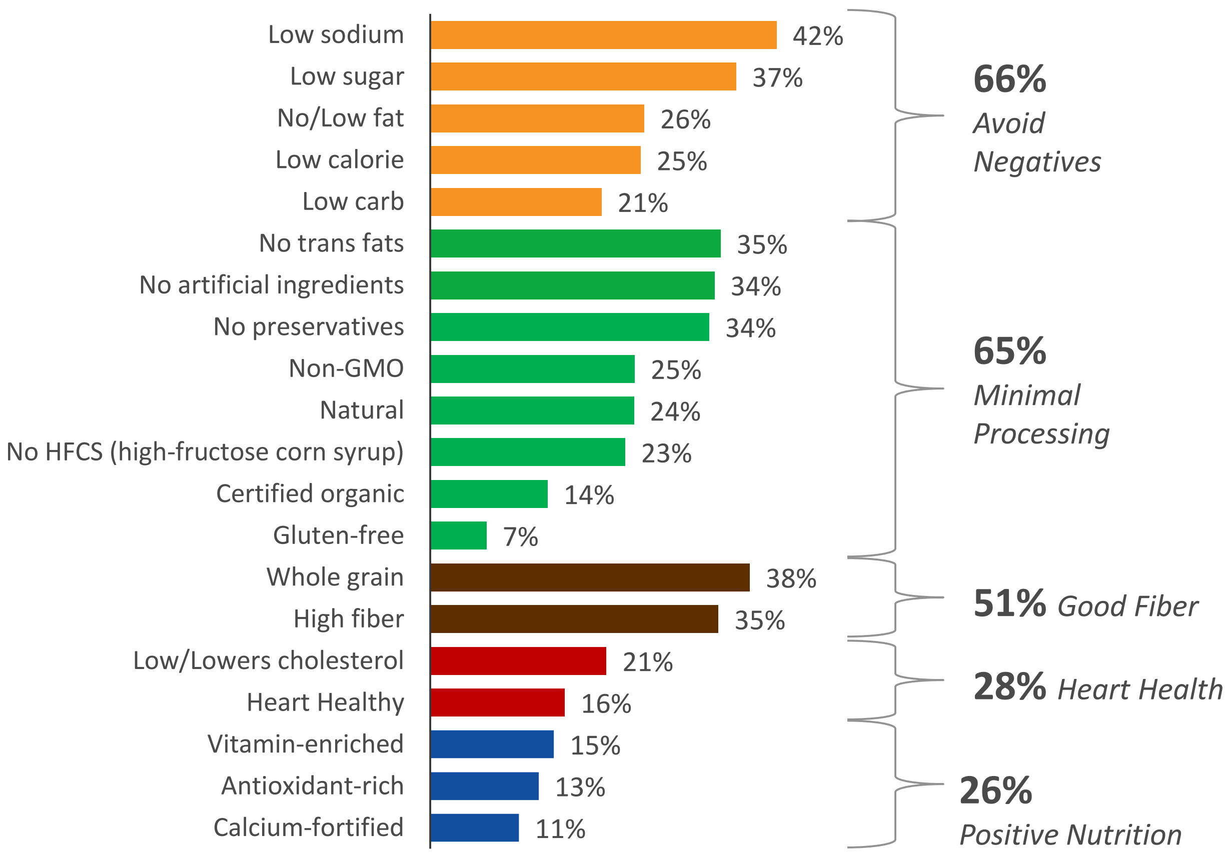
Whether adopting healthier eating habits is out of need or desire, shoppers are seeking fresh by avoiding negatives and seeking minimal processing. They are also seeking positive nutrition through nutrient dense foods and foods with health benefits (see Chart 3.6). For some shoppers, like Leigh (below), seeking fresh foods today connects her family to the era of a less processed past.

Retailers know that while consumers say they want non-GMO (fear factor), consumers also don't understand what they are or what foods are most likely to have them (including understanding that organic is all non-GMO). Retailers can help shoppers seeking fresh, less processed by guiding them to attributes and claims that ladder up to these benefits – organic, natural, local, non-GMO.

"My husband comes from an Italian family who cooked and ate together. My mom was young with lots of kids. She did what was easy and cheap. We ate out of boxes and cans. Food was not good growing up. I don't want that for my kids".

Leigh, 48

CHART 3.6: PRODUCT CLAIMS CONSUMERS SEEK WHEN PURCHASING A FOOD PRODUCT

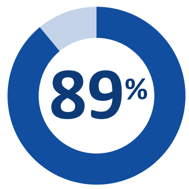


Source: FMI U.S. Grocery Shopper Trends 2016, Q: "What health claims do you look for on the package when purchasing a food product? (Select all that apply.)" 2016. n=1,056. (See Appendix: Tables A.47–49)

Retailers are well-positioned to be allies in health & wellness

As consumers desire to eat healthier, food retailers are well-positioned to help them in this goal. Nine out of ten shoppers believe eating at home is a healthier option than eating out (see Figure 3.7). As food becomes the foundation of wellness, and fresh, less processed is the indicator of a food's healthfulness, shoppers are increasingly seeing their primary grocery store as their primary health store. And now with the abundance of prepared and grab-n-go food choices, shoppers tell us that their healthiest restaurant is their primary store.

FIGURE 3.7: CONSUMER PERCEPTION OF FOOD FROM HOME VS. FOOD FROM RESTAURANTS



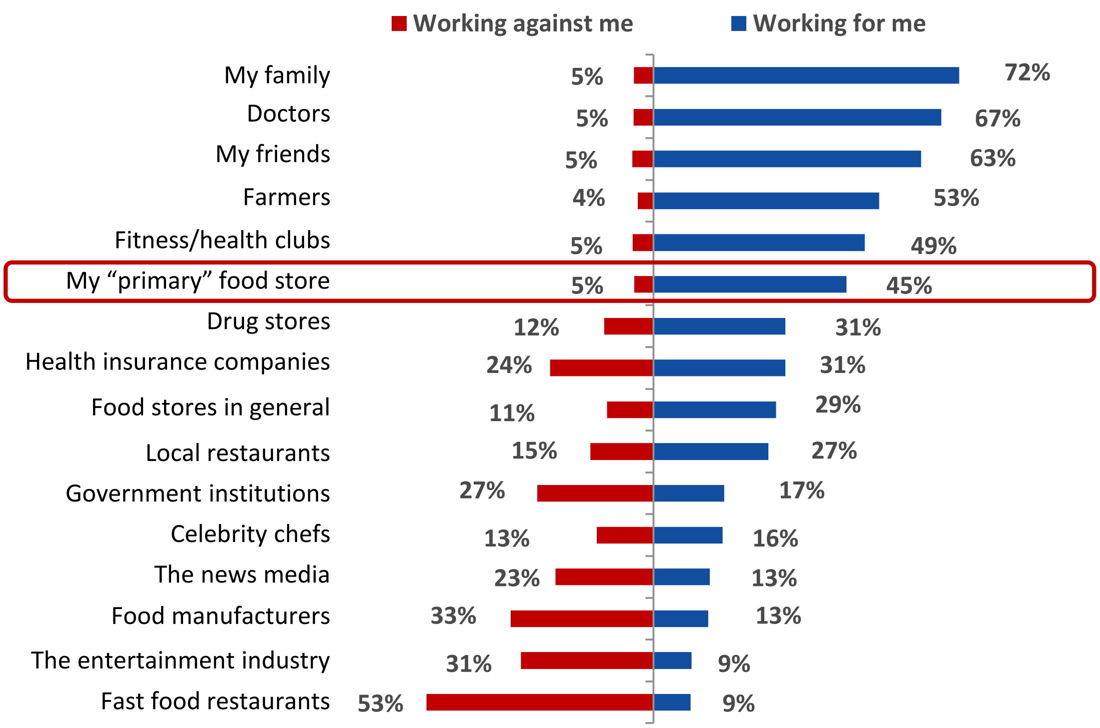
of Shoppers believe eating ***AT HOME is HEALTHIER*** than eating at a restaurant

Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "Thinking about the food you prepare at home and the food you eat away from home, which of the following describes how you feel about the food you eat? (Top-2 Box: Food from home is somewhat/much healthier)" n=1,056. (See Appendix: Table A.53)

In the struggle to stay healthy, shoppers recognize their primary store as an ally that helps them keep on track

Not surprisingly, health influencers afforded the greatest trust are friends, family and healthcare experts—doctors and fitness coaches. However, shoppers also consider their primary grocery store a key ally in eating healthy (see Chart 3.7).

CHART 3.7: FOOD STORES RATE HIGH AS WELLNESS ALLIES, HELPING CONSUMERS STAY HEALTHY



Source: FMI U.S. Grocery Shopper Trends, 2016. Q: "When it comes to helping you stay healthy, which of these people and institutions would you say tend to be on your side (helping you), and which tend to be working against you (making it more difficult for you to stay healthy)?" n=1,056. (See Appendix: Tables A.55)

Retailers have an opportunity to help their customers in both their wellness journeys and shared shopping strategies by being an ally in their culinary adventures

Recognizing the impact that macro forces and food culture are having on shoppers at the household level is the first step for grocery retailers to be able to strengthen shopper relationships.

Different eating agendas within households are increasingly driving shopping agendas and the negotiation of how these are shared. Retailers increasingly have a broader base of shoppers for which to curate, inspire and educate. Co-shoppers often have different retailer preferences within the same household, so competition continues to intensify and retailers must cultivate these newer relationships.

Motivations for actively improving culinary literacy are strong among those who have more recently started their culinary journeys – Millennials and men who are starting to share in a greater part of the cooking and/or shopping. These shoppers present strong opportunities for grocery retailers to guide.

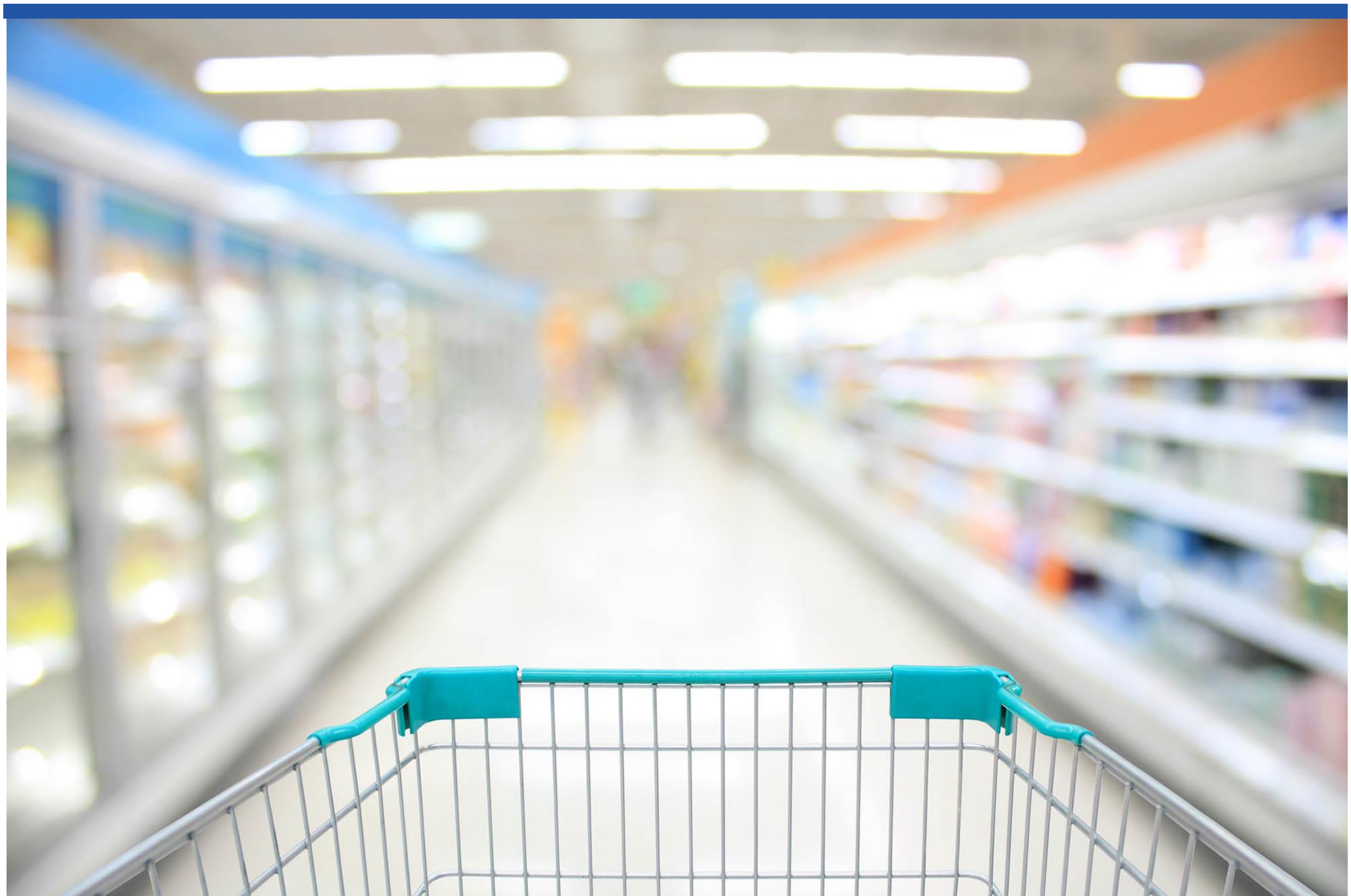
As shoppers grow more confident in their cooking, their approach to shopping becomes more confident. They tend to shop more frequently for fresh items and appreciate more fully distinctions of quality. Consumers are increasingly embracing the opportunity for discovery and personal enjoyment as part of their broader household shopping. Grocery retailers are well positioned as a trusted ally to help their shoppers explore and discover.

Retailers that take a broader view of shoppers' adventures will find more opportunities to build strong relationships for the future.

Food for Thought:

Consumers typically credit food stores with keeping their food safe and supporting their wellness aspirations. However, as shoppers increasingly tend to shop multiple channels, food retailers should seize opportunities to strengthen the shopper relationship in order to attract more trips and earn fuller shopping carts.

- *As shoppers increasingly purchase store brands, particularly in fresh categories, how can grocers leverage the store's 'fresh' departments as a differentiator for their store brand?*
- *Consumers believe most food safety issues occur during processing at the plant. How can retailers reassure shoppers that store brands are safe?*
- *Consumers trust grocery stores over restaurants for both food safety and nutrition. Food stores also outrank restaurants as an ally in wellness. How can retailers build upon this trust through fresh, prepared meals and snacks?*



Appendix: Tables and Methodology

The tables found in this Appendix supplement the main charts and figures presented with analysis in the body of the main report. The tables here report results by various demographics and trended data. When trended information is available, this year's 2016 results are compared with results found in 2015. Overall 2016 results are reported for specific demographic groupings including gender, age cohort, income and primary channel utilized.

TABLE A.1: CONSUMER DEMOGRAPHIC PROFILE 1

Number of Shoppers: n=2,061	Total
Gender	
Male	**45%**
Female	**55%**
Age cohort	
Millennials 18-37	**31%**
Gen X 38-51	**26%**
Boomers 52-70	**35%**
Matures 71+	**8%**
Average age	***48.3***
US Census Division	
East North Central	**15%**
West North Central	**6%**
Middle Atlantic	**13%**
New England	**5%**
East South Central	**5%**
South Atlantic	**21%**
West South Central	**12%**
Mountain	**9%**
Pacific	**14%**
Education Level	
High school or less	**39%**
Some College	**37%**
College graduate	**8%**
Graduate school	**16%**
Total family income in past 12 months	
Under $15,000	**9%**
$15,000 - $24,999	**9%**
$25,000 - $34,999	**11%**
$35,000 - $49,999	**13%**
$50,000 - $74,999	**18%**
$75,000 - $99,999	**11%**
$100,000 or more	**20%**
Prefer not to respond	**8%**
Respondent's race	
Caucasian	**82%**
African American	**11%**
Other	**7%**
Latino/Hispanic	**15%**
Household grocery shopping responsibility	
I share at least 50% responsibility to shop for groceries.	**30%**
I have all or most of the responsibility to shop for groceries.	**70%**

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.2: CONSUMER DEMOGRAPHIC PROFILE 2

Number of Shoppers: n=2,061	Total
Employment status	
Employed full time	**37%**
Employed part time	**9%**
Self-employed	**6%**
Not employed, but looking for work	**6%**
Not employed and not looking for work	**1%**
Not employed, unable to work due to a disability or illness	**4%**
Retired	**22%**
On Permanent/Temporary Disability	**3%**
Student	**4%**
Stay-at-home spouse or partner/Housewife/husband	**8%**
Employment status description	
I work 30 hours or more per week	**30%**
I work 21 to 29 hours per week	**34%**
I work less than 20 hours per week	**12%**
I work 20 hours per week	**24%**
Marital status	
Married or Civil union	**51%**
Never married	**24%**
Divorced	**10%**
Widow/Widower	**7%**
Living with Partner	**6%**
Separated	**1%**
Employment status of spouse or partner	
He/She works less than 20 hours per week	**5%**
He/She works 20-29 hours per week	**5%**
He/She works 30 or more hours per week	**57%**
He/She does not work for pay	**32%**
Residence	
An urban area	**25%**
A suburb	**42%**
A small town	**17%**
A rural area	**16%**

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.3-A: SHOPPER SEGMENTATION

Number of Shoppers: n=2,061	Total	Self	Co-Shoppers			Total Co-Shoppers
			Primary	Secondary	Shared	
All Shoppers	**100%**	**24%**	**45%**	**9%**	**22%**	**58%**
Gender						
Men	**45%**	48%	31%	73%	59%	49%
Women	**55%**	52%	69%	27%	41%	51%
Age cohort						
Millennials 18-37	**31%**	19%	32%	37%	37%	36%
Young Millennials 18-27	***13%***	*7%*	*11%*	*27%*	*18%*	*17%*
Older Millennials 28-37	***18%***	*13%*	*21%*	*10%*	*19%*	*19%*
Gen X 38-51	**26%**	23%	28%	23%	26%	26%
Boomers 52-70	**35%**	45%	32%	31%	32%	32%
Matures 71+	**8%**	13%	7%	9%	5%	7%
Region						
East	**25%**	25%	45%	6%	24%	21%
Midwest	**26%**	24%	47%	8%	20%	21%
South	**33%**	23%	46%	10%	21%	35%
West	**16%**	25%	41%	11%	23%	23%
Primary Store						
Full-service supermarket	**49%**	51%	50%	42%	49%	49%
Club store	**5%**	3%	5%	5%	6%	5%
Supercenter	**25%**	21%	27%	25%	24%	25%
Other	**14%**	16%	12%	23%	14%	15%
None of these	**7%**	9%	6%	6%	7%	6%
Household Income						
Less than $25K	**19%**	36%	13%	16%	12%	12%
$25K - $34.9K	**11%**	14%	11%	7%	9%	8%
$35K - $49.9K	**13%**	15%	13%	11%	12%	12%
$50K - $74.9K	**18%**	14%	18%	18%	20%	19%
$75K - $99.9K	**11%**	6%	13%	15%	12%	14%
$100K - $124.9K	**9%**	4%	10%	8%	12%	11%
More than $125K	**12%**	4%	14%	13%	15%	15%
Prefer not to respond	**8%**	7%	7%	13%	8%	8%
Area						
Urban	**25%**	30%	22%	24%	26%	25%
Suburban	**42%**	41%	42%	46%	42%	42%
Rural	**16%**	13%	18%	17%	13%	17%
Small Town	**17%**	15%	18%	12%	18%	16%

*Note: Percentages may not add to 100% due to rounding

TABLE A.3-B: SHOPPER SEGMENTATION, CONTINUED

Number of Shoppers: n=2,061	Total	Age Cohort				*Older Millennials 28-37*	*Younger Millennials 18-27*
		Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37		
Single Person Households							
Self Shopper	**24%**	37%	30%	21%	15%	17%	13%
Multi-Person Households							
Total Co-Shoppers	***58%***	***49%***	***53%***	***57%***	***68%***	***63%***	***76%***
Sole Shopper	***18%***	*15%*	*16%*	*22%*	*17%*	*20%*	*12%*
Primary Shopper	**45%**	40%	41%	49%	47%	54%	37%
Secondary Shopper	**9%**	10%	8%	8%	11%	5%	19%
Shared Shopper	**22%**	13%	20%	22%	27%	24%	31%

Number of Shoppers: n=2,061	Total	Gender		Total Family Income		
		Male	Female	Under $35K	$35K-$99,999	$100K or more
Single Person Households						
Self Shopper	**24%**	26%	22%	40%	19%	10%
Multi-Person Households						
Total Co-Shoppers	***58%***	***64%***	***54%***	***40%***	***63%***	***73%***
Sole Shopper	***18%***	*10%*	*24%*	*20%*	*17%*	*17%*
Primary Shopper	**45%**	31%	57%	37%	48%	52%
Secondary Shopper	**9%**	15%	5%	7%	9%	9%
Shared Shopper	**22%**	29%	16%	16%	23%	29%

TABLE A.4: HOUSEHOLD SEGMENTATION

Number of Shoppers: n=2,061	Total	Millennials, living alone (18-37)	Millennial couples & multi-person, no kids (18-37)	Family household, with kids	Non-Millennial couples & multi-person, no kids (38+)	Non-Millennial, living alone (38+)
All Shoppers	**100%**	5%	13%	24%	39%	19%
Gender						
Men	**45%**	57%	50%	38%	45%	46%
Women	**55%**	43%	50%	62%	55%	54%
Age cohort						
Millennials 18-37	**31%**	100%	100%	52%	*	*
Gen X 38-51	**26%**	*	*	41%	28%	29%
Boomers 52-70	**35%**	*	*	7%	59%	55%
Matures 71+	**8%**	*	*	*	13%	16%
Region						
East	**22%**	29%	18%	20%	24%	21%
Midwest	**21%**	21%	16%	23%	22%	21%
South	**34%**	34%	36%	36%	34%	32%
West	**23%**	15%	30%	21%	21%	26%
Primary Store						
Full-service supermarket	**49%**	47%	47%	44%	52%	51%
Club store	**5%**	5%	2%	8%	5%	3%
Supercenter	**25%**	11%	27%	29%	23%	24%
Other	**14%**	30%	19%	14%	12%	12%
None of these	**7%**	7%	4%	6%	8%	10%
Household Income						
Less than $25K	**19%**	22%	18%	17%	9%	39%
$25K - $34.9K	**11%**	12%	8%	10%	11%	15%
$35K - $49.9K	**13%**	19%	12%	10%	14%	13%
$50K - $74.9K	**18%**	14%	16%	18%	20%	14%
$75K - $100K	**11%**	13%	12%	13%	14%	4%
$100K - $124.9K	**9%**	6%	9%	13%	9%	4%
More than $125K	**12%**	6%	16%	12%	15%	4%
Prefer not to respond	**8%**	7%	9%	6%	8%	7%
Area						
Urban	**25%**	26%	35%	21%	21%	31%
Suburban	**42%**	50%	40%	45%	42%	39%
Rural	**17%**	8%	17%	19%	17%	17%
Small Town	**16%**	16%	8%	15%	20%	12%

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.5: TRENDED WEEKLY HOUSEHOLD GROCERY EXPENSES

Q: On average, about how much do you (and your family) spend each week on groceries for your household? Consider only grocery type items.

Q: Of the money you spend in an average week for groceries, how much is spent at your PRIMARY STORE?

Number of Shoppers: n=2,061	2016 Spending			2015 Total Spending
	Total	At Primary Store	Primary Store Share	
All Shoppers	**$107.34**	**$81.52**	**76%**	**$100.81**
Size of Household				
1 person	$66.57	$52.25	78%	$61.31
2	$100.47	$77.93	78%	$97.24
3 or 4	$138.03	$100.75	73%	$123.74
5 or more	$161.52	$119.23	74%	$158.03
Gender				
Men	$107.23	$81.18	76%	$100.80
Women	$107.43	$81.81	76%	$100.81
Household Composition				
Children	$145.70	$107.85	74%	$140.14
No Children	$95.07	$72.93	77%	$87.96
Household Income				
Less than $25K	$85.96	$66.42	77%	$68.18
$25K - $34.9K	$97.61	$73.38	75%	$91.24
$35K - $49.9K	$101.18	$76.01	75%	$95.62
$50K - $74.9K	$105.86	$80.21	76%	$104.69
$75K - $99.9K	$120.64	$90.24	75%	$113.50
$100K - $124.9K	$127.55	$96.45	76%	$114.92
More than $125K	$136.39	$102.80	75%	$143.60
Age cohort				
Millennials 18-37	$117.19	$87.04	74%	$104.97
Generation X 38-51	$122.81	$91.34	74%	$112.44
Boomers 52-70	$93.02	$72.68	78%	$93.14
Matures 71+	$82.82	$66.89	81%	$82.78
Primary Store				
Full-service supermarket	$104.81	$80.91	77%	$95.06
Club store	$152.94	$94.47	62%	$132.88
Supercenter	$108.42	$84.84	78%	$103.61
Region				
East	$111.73	$86.76	78%	$106.18
Midwest	$97.62	$76.27	78%	$98.38
South	$110.47	$84.85	77%	$96.45
West	$107.57	$76.56	71%	$105.87

TABLE A.6: FREQUENCY OF VISITS TO GROCERY STORE

Q: About how many visits do you make IN PERSON to a supermarket or grocery store in an average week? Please include going to the same store more than once, as well as going to different stores. Your best estimate is fine.

		Gender		Age cohort			
Number of Shoppers: n=2,061	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
6 or more visits per week	**1%**	1%	1%	*	1%	1%	2%
5 visits per week	**1%**	1%	1%	*	1%	1%	2%
4 visits per week	**3%**	3%	3%	3%	3%	3%	3%
3 visits per week	**11%**	11%	12%	10%	10%	13%	11%
2 visits per week	**28%**	28%	28%	33%	26%	29%	28%
1 visit per week	**36%**	35%	37%	35%	40%	36%	33%
I visit about once every two weeks	**14%**	15%	13%	14%	15%	12%	15%
I visit about once a month	**4%**	4%	3%	3%	4%	2%	5%
I visit less often than once a month	**1%**	2%	1%	2%	*	2%	2%
Net - At least weekly	**81%**	79%	82%	81%	81%	84%	79%
Average Trips per week	**1.6**	1.6	1.6	1.5	1.6	1.7	1.7

		Total family income			Primary channel		
Number of Shoppers: n=2,061	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
6 or more visits per week	**1%**	1%	1%	1%	1%	2%	*
5 visits per week	**1%**	1%	2%	1%	1%	2%	1%
4 visits per week	**3%**	4%	3%	2%	4%	2%	*
3 visits per week	**11%**	12%	11%	12%	11%	11%	14%
2 visits per week	**28%**	21%	28%	34%	28%	26%	30%
1 visit per week	**36%**	36%	36%	39%	39%	37%	29%
I visit about once every two weeks	**14%**	17%	14%	10%	12%	16%	21%
I visit about once a month	**4%**	6%	3%	2%	3%	4%	3%
I visit less often than once a month	**1%**	1%	2%	*	1%	1%	2%
Net - At least weekly	**81%**	75%	82%	88%	85%	79%	74%
Average Trips per week	**1.6**	1.6	1.7	1.7	1.6	1.6	1.5

		Shopper Type				
Number of Shoppers: n=2,061	Total	Self Shopper	Primary Shopper	Secondary Shopper	Shared Shopper	Total Co-Shoppers
6 or more visits per week	**1%**	1%	2%	2%	1%	1%
5 visits per week	**1%**	2%	1%	1%	1%	1%
4 visits per week	**3%**	2%	3%	4%	4%	4%
3 visits per week	**11%**	9%	12%	13%	11%	12%
2 visits per week	**28%**	20%	32%	27%	28%	30%
1 visit per week	**36%**	38%	35%	33%	38%	35%
I visit about once every two weeks	**14%**	20%	11%	17%	13%	13%
I visit about once a month	**4%**	6%	2%	4%	4%	3%
I visit less often than once a month	**1%**	2%	1%	*	1%	*
Net - At least weekly	**81%**	72%	85%	80%	82%	83%
Average Trips per week	**1.6**	1.4	1.7	1.7	1.6	1.7

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.7: TRENDED OUTLETS SHOPPED FOR GROCERIES

Q: When you need grocery type items, how often do you shop in person or online at each of the following?

	2016				2015		1 yr % Change	
Number of Shoppers: n=2,061	Almost Every Time	Fairly Often	Occasionally	Never	Almost Every Time	Never	Almost Every Time	Never
Regular full-service supermarket	58%	27%	12%	3%	59%	2%	-1%	57%
Supercenter that combines a grocery store with general merchandise	25%	29%	32%	14%	22%	19%	12%	-25%
Conventional discount store	14%	24%	37%	24%	11%	28%	29%	-14%
Warehouse club store	6%	23%	30%	41%	7%	42%	-12%	-2%
Low-price, no-frills grocery store	8%	14%	29%	50%	6%	54%	32%	-7%
Natural or organic food store	3%	9%	29%	58%	4%	56%	-6%	4%
Drug store	4%	14%	47%	35%	4%	39%	5%	-9%
Low-price, no-frills store with limited food assortment (e.g. a "dollar" store)	4%	16%	39%	41%	3%	46%	32%	-10%
Online-only food or grocery service/source, like Amazon.com, FreshDirect, or a subscription to meals or produce, without a store you can visit and shop	1%	4%	15%	80%	1%	84%	-20%	-5%
Convenience store	2%	6%	30%	62%	1%	67%	59%	-8%
Ethnic store	2%	6%	25%	68%	1%	67%	190%*	1%

Note: Unlike all other format-related questions in Trends, this question is not based on actual store names. Instead, respondents were given a detailed description for each of the formats.

Percentages may not add to 100 percent due to rounding.

*Growth from 1% in 2015 to 2% in 2016 does translate to 190% growth because the base numbers are so small

TABLE A.8: TRENDED FORMATS SHOPPED IN THE PAST 30 DAYS

Q: Please indicate the stores where you've purchased grocery type items in the past 30 days.

Number of Shoppers: n=2,061	2016	2015	1 yr % Change
Supermarket/full service	88%	85%	3%
Super Center	63%	57%	12%
Club store	33%	33%	1%
Limited assortment store	26%	20%	25%
Drug store	25%	24%	4%
Dollar store	23%	18%	27%
Discount store	19%	20%	-4%
Organic/specialty store	19%	18%	3%
Convenience store	11%	7%	69%
Online grocer	10%	7%	34%
Ethnic store	1%	*	N/A
Farmer market	*	*	N/A

*= less than 0.5 percent of responses

TABLE A.9: PRIMARY STORES

Q: Which store or service do you consider your PRIMARY source of grocery-type items? In other words, where do you spend the most money on grocery-type items such as food, beverages, paper goods, health and beauty items, cleaning supplies, etc. for use in your home?

		Gender		Age cohort			
Number of Shoppers: n=2,061	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Primary channel							
Regular Full-Service Supermarket	**49%**	49%	49%	59%	51%	48%	45%
Supercenter	**25%**	24%	26%	23%	24%	24%	26%
Limited Assortment Store	**7%**	7%	7%	2%	7%	6%	7%
Warehouse Club Store	**5%**	6%	4%	3%	5%	6%	5%
Natural & Organic Store	**3%**	3%	4%	*	2%	6%	4%
Conventional Discount Store	**2%**	1%	2%	1%	1%	1%	3%
Military store	**1%**	1%	1%	2%	1%	1%	2%
Online-only food or grocery source/service	**1%**	1%	*	1%	*	*	2%
Dollar Store	*	*	*	*	*	*	*
Drug Store	*	*	*	1%	*	*	1%
Convenience Store	*	*	*	1%	*	*	*
Ethnic Store	*	*	*	1%	*	*	*
None of these	**7%**	6%	8%	7%	8%	7%	5%

		Total family income			Primary channel		
Number of Shoppers: n=2,061	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Primary channel							
Regular Full-Service Supermarket	**49%**	42%	49%	58%	100%	*	*
Supercenter	**25%**	31%	25%	14%	*	100%	*
Limited Assortment Store	**7%**	9%	7%	3%	*	*	*
Warehouse Club Store	**5%**	2%	5%	9%	*	*	100%
Natural & Organic Store	**3%**	2%	3%	7%	*	*	*
Conventional Discount Store	**2%**	2%	1%	2%	*	*	*
Military store	**1%**	*	2%	*	*	*	*
Online-only food or grocery source/service	**1%**	*	1%	1%	*	*	*
Dollar Store	*	1%	*	*	*	*	*
Drug Store	*	*	*	*	*	*	*
Convenience Store	*	*	*	*	*	*	*
Ethnic Store	*	*	*	*	*	*	*
None of these	**7%**	10%	6%	6%	*	*	*

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.10: FREQUENCY OF VISITS TO PRIMARY STORE

Q: How many of your total grocery trips are to your [Primary Store]?

		Gender		Age cohort			
Number of Shoppers: n=1,907	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
6 or more visits per week	**1%**	1%	1%	*	*	*	2%
5 visits per week	*	*	*	*	1%	*	*
4 visits per week	**1%**	2%	1%	1%	2%	1%	2%
3 visits per week	**4%**	4%	5%	5%	3%	5%	5%
2 visits per week	**15%**	17%	13%	16%	14%	15%	15%
1 visit per week	**49%**	47%	50%	47%	51%	53%	44%
I visit about once every two weeks	**20%**	18%	21%	19%	21%	18%	21%
I visit about once a month	**8%**	9%	7%	10%	8%	5%	9%
I visit less often than once a month	**2%**	3%	1%	2%	1%	2%	2%
Net - At least weekly	**70%**	71%	70%	70%	70%	75%	67%
Average Trips per week	**1.2**	1.2	1.1	1.1	1.1	1.2	1.2

		Total family income			Primary channel		
Number of Shoppers: n=1,907	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
6 or more visits per week	**1%**	1%	*	1%	1%	1%	*
5 visits per week	*	*	1%	*	*	1%	*
4 visits per week	**1%**	2%	2%	1%	2%	1%	*
3 visits per week	**4%**	7%	3%	3%	5%	5%	*
2 visits per week	**15%**	12%	15%	19%	18%	13%	3%
1 visit per week	**49%**	42%	50%	53%	51%	47%	31%
I visit about once every two weeks	**20%**	22%	20%	18%	18%	22%	29%
I visit about once a month	**8%**	13%	6%	4%	4%	9%	32%
I visit less often than once a month	**2%**	2%	2%	1%	1%	1%	5%
Net - At least weekly	**70%**	63%	71%	77%	77%	68%	34%
Average Trips per week	**1.2**	1.1	1.2	1.2	1.2	1.2	0.6

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.11: SHOPPING AT PRIMARY STORE BY GENDER AND AGE COHORT

		Gender		Age cohort			
	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
You indicated that your PRIMARY store is not the most conveniently located to you. For which of the following reasons do you primarily shop at this store (instead of the one that is closest)? n=1,010							
Lower prices (in general)	**66%**	63%	68%	68%	69%	66%	60%
Lower prices on specific item(s) I want	**47%**	45%	50%	54%	49%	44%	46%
Better variety and selection of the grocery products I buy	**44%**	44%	44%	51%	45%	41%	43%
Better quality and variety of fresh foods (produce, meat, prepared foods, bakery, etc.)	**36%**	38%	35%	35%	37%	35%	37%
Better variety and selection of private brand items	**27%**	30%	25%	32%	29%	27%	24%
Just habit or more familiar	**25%**	26%	24%	21%	23%	23%	31%
Better personnel or customer service	**19%**	21%	17%	23%	21%	16%	19%
Ability to shop faster	**18%**	20%	16%	13%	20%	17%	19%
Cleaner store	**15%**	17%	14%	12%	15%	14%	18%
Better selection of special items such as ethnic or special-diet foods	**14%**	15%	14%	18%	10%	15%	18%
Better selection of all natural/organic foods	**14%**	16%	13%	9%	8%	15%	22%
Located closer to other stores or places I want to go	**14%**	15%	13%	17%	18%	11%	12%
Closer to my work/daily commute	**9%**	12%	7%	3%	9%	11%	9%
Better variety of other in-store services, such as bank/ATM, cleaners, coffee shop, etc.	**8%**	10%	6%	8%	7%	8%	9%
What would get you to switch from your PRIMARY store to a store that was a bit further? n=897							
Lower prices (in general)	**67%**	69%	65%	61%	67%	66%	68%
Lower prices on specific item(s) I want	**40%**	39%	41%	39%	38%	41%	43%
Better quality and variety of fresh foods (produce, meat, prepared foods, bakery, etc.)	**32%**	32%	33%	32%	33%	34%	31%
Better variety and selection of the grocery products I buy	**28%**	27%	30%	23%	29%	27%	30%
Located closer to other stores or places I want to go	**22%**	21%	23%	20%	18%	24%	25%
Ability to shop faster	**17%**	20%	15%	15%	14%	16%	21%
Just habit or more familiar	**16%**	14%	17%	14%	15%	13%	20%
Closer to my work/daily commute	**14%**	16%	13%	7%	9%	13%	23%
Better variety and selection of private brand items	**13%**	15%	12%	15%	11%	13%	15%
Better personnel or customer service	**12%**	11%	12%	5%	10%	14%	13%
Better selection of all natural/organic foods	**11%**	9%	13%	2%	8%	13%	15%
Cleaner store	**10%**	9%	10%	*	7%	11%	15%
Better selection of special items such as ethnic or special-diet foods	**9%**	10%	9%	9%	7%	13%	9%
Better variety of other in-store services, such as bank/ATM, cleaners, coffee shop, etc.	**6%**	7%	6%	5%	6%	6%	8%

*= less than 0.5 percent of responses

TABLE A.12: SHOPPING AT PRIMARY STORE BY INCOME AND PRIMARY CHANNEL

		Total family income			Primary channel		
	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
You indicated that your PRIMARY store is not the most conveniently located to you. For which of the following reasons do you primarily shop at this store (instead of the one that is closest)? n=1,010							
Lower prices (in general)	**66%**	63%	67%	70%	56%	73%	71%
Lower prices on specific item(s) I want	**47%**	46%	49%	45%	43%	52%	54%
Better variety and selection of the grocery products I buy	**44%**	44%	45%	44%	52%	40%	32%
Better quality and variety of fresh foods (produce, meat, prepared foods, bakery, etc.)	**36%**	36%	35%	38%	48%	24%	25%
Better variety and selection of private brand items	**27%**	29%	26%	30%	31%	24%	23%
Just habit or more familiar	**25%**	28%	27%	18%	26%	30%	10%
Better personnel or customer service	**19%**	18%	20%	19%	29%	7%	9%
Ability to shop faster	**18%**	18%	20%	13%	18%	16%	11%
Cleaner store	**15%**	12%	17%	16%	22%	8%	6%
Better selection of special items such as ethnic or special-diet foods	**14%**	13%	14%	16%	13%	12%	9%
Better selection of all natural/organic foods	**14%**	10%	15%	19%	13%	7%	11%
Located closer to other stores or places I want to go	**14%**	18%	13%	13%	17%	12%	6%
Closer to my work/daily commute	**9%**	7%	9%	14%	13%	7%	3%
Better variety of other in-store services, such as bank/ATM, cleaners, coffee shop, etc.	**8%**	8%	9%	6%	9%	10%	2%
What would get you to switch from your PRIMARY store to a store that was a bit further? n=897							
Lower prices (in general)	**67%**	69%	63%	72%	66%	77%	68%
Lower prices on specific item(s) I want	**40%**	37%	41%	40%	40%	47%	44%
Better quality and variety of fresh foods (produce, meat, prepared foods, bakery, etc.)	**32%**	25%	33%	44%	34%	31%	31%
Better variety and selection of the grocery products I buy	**28%**	26%	28%	36%	30%	25%	41%
Located closer to other stores or places I want to go	**22%**	26%	20%	23%	21%	22%	12%
Ability to shop faster	**17%**	15%	17%	18%	15%	22%	4%
Just habit or more familiar	**16%**	15%	15%	17%	15%	18%	37%
Closer to my work/daily commute	**14%**	13%	15%	16%	13%	13%	26%
Better variety and selection of private brand items	**13%**	13%	14%	10%	12%	13%	18%
Better personnel or customer service	**12%**	10%	11%	12%	11%	14%	20%
Better selection of all natural/organic foods	**11%**	10%	10%	15%	10%	12%	12%
Cleaner store	**10%**	10%	9%	11%	9%	11%	0%
Better selection of special items such as ethnic or special-diet foods	**9%**	7%	9%	12%	10%	8%	12%
Better variety of other in-store services, such as bank/ATM, cleaners, coffee shop, etc.	**6%**	7%	6%	5%	5%	9%	4%

Note: Percentages may not add to 100% due to rounding

TABLE A.13: TRENDED AVERAGE STORE RATINGS AND LEVELS OF RECOMMENDATION

Q: All things considered, how would you rate the job [PRIMARY STORE] is doing in meeting your needs?

Number of Shoppers: n=1,919	Ratings			Average Score		1 yr % Change
	1 to 5	6 to 8	9 to 10	2016	2015	
All Shoppers	**4%**	**47%**	**49%**	**8.3**	**8.3**	**0%**
Gender						
Men	3%	50%	47%	8.3	8.2	1%
Women	4%	45%	50%	8.4	8.3	1%
Age cohort						
Millennials 18-37	5%	51%	43%	8.2	8.1	1%
Generation X 38-51	3%	52%	45%	8.3	8.2	1%
Boomers 52-70	4%	42%	54%	8.4	8.3	2%
Matures 71+	1%	39%	60%	8.7	8.7	0%
Region						
East	3%	50%	46%	8.3	8.3	0%
Midwest	5%	49%	46%	8.3	8.2	1%
South	5%	41%	54%	8.4	8.3	1%
West	2%	51%	46%	8.3	8.3	0%
Primary Store						
Full-service supermarket	3%	46%	51%	8.4	8.4	0%
Club store	2%	40%	59%	8.6	8.7	-1%
Supercenter	6%	54%	40%	8.1	7.9	2%
Household Income						
Less than $25K	4%	43%	52%	8.4	8.3	2%
$25K - $34.9K	2%	44%	54%	8.5	8.3	2%
$35K - $49.9K	4%	48%	48%	8.4	8.3	2%
$50K - $74.9K	4%	49%	47%	8.2	8.2	0%
$75K - $99.9K	5%	48%	47%	8.3	8.4	-1%
$100K - $124.9K	*	50%	50%	8.5	8.4	2%
More than $125K	5%	56%	39%	8.1	8.2	-2%
Area						
Urban	2%	47%	51%	8.5	8.3	2%
Suburban	4%	48%	48%	8.3	8.4	0%
Rural	8%	44%	48%	8.2	8.1	1%
Small Town	4%	48%	48%	8.4	8.1	3%

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.14: ONLINE GROCERY SHOPPING FREQUENCY

Q: How many ONLINE ORDERS of grocery type items - that is, foods and other household items that you would typically find in a grocery store - would you say you receive in an average month?

		Gender		Age cohort			
Number of Shoppers: n=241	**Total**	**Male**	**Female**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**
Fewer than one order a month	**44%**	39%	49%	55%	58%	40%	38%
About one order a month	**33%**	33%	33%	39%	27%	35%	34%
About one order every two weeks	**16%**	20%	12%	6%	6%	21%	18%
About one order per week	**5%**	6%	4%	*	9%	3%	5%
More than one order per week	**2%**	3%	2%	*	*	1%	5%

		Total family income			Primary channel		
Number of Shoppers: n=241	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
Fewer than one order a month	**44%**	46%	43%	41%	53%	41%	37%
About one order a month	**33%**	29%	30%	41%	29%	28%	33%
About one order every two weeks	**16%**	21%	16%	14%	13%	18%	22%
About one order per week	**5%**	3%	7%	2%	3%	11%	5%
More than one order per week	**2%**	*	4%	1%	2%	1%	3%

Note: Percentages may not add to 100% due to rounding

*= less than 0.5 percent of responses

TABLE A.15: ONLINE CATEGORY PURCHASE PREFERENCES BY GENDER AND AGE COHORT

Q: Which, if any, of these types of grocery items have you ORDERED ONLINE during the PAST 12 MONTHS?

		Gender		Age cohort			
Number of Shoppers: n=241	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Health and beauty care products (shampoo, soap, makeup)	**37%**	32%	43%	31%	42%	40%	34%
Household cleaning products	**35%**	27%	43%	26%	42%	36%	32%
Packaged/canned foods (macaroni & cheese, soup, beans, pasta sauce)	**34%**	27%	42%	46%	38%	33%	32%
Salty snacks (such as bars, chips, crackers, nuts, popcorn, pretzels, trail mix)	**31%**	20%	42%	58%	31%	33%	26%
Paper products, such as paper towels or napkins	**31%**	16%	46%	54%	40%	33%	23%
Sweets (such as chocolate, cookies, candy, ice cream)	**30%**	23%	36%	39%	34%	32%	25%
Condiments (such as ketchup, BBQ sauce, salad dressings)	**28%**	26%	30%	52%	44%	23%	20%
Pet food or treats	**26%**	22%	30%	38%	24%	24%	27%
Baking/cooking items (such as flour, sugar, salt, cake mixes, cooking oil)	**25%**	18%	32%	39%	36%	17%	24%
Non-prescription drugs	**20%**	21%	20%	32%	30%	21%	13%
Frozen foods (such as entrees, meats, pizzas, frozen fruit/vegetables)	**19%**	18%	20%	43%	22%	20%	14%
Refrigerated dairy foods (such as cheese, butter, eggs, yogurt)	**17%**	16%	18%	29%	18%	10%	20%
Fresh produce (such as fruits and vegetables)	**16%**	12%	19%	29%	20%	11%	15%
Bulk foods	**15%**	16%	15%	*	16%	10%	20%
Milk, or non-dairy substitutes	**15%**	15%	15%	29%	18%	10%	15%
Packaged breads (such as packaged bagels, hamburger/hot dog buns)	**15%**	16%	13%	18%	19%	12%	14%
Fresh meats and seafood	**13%**	11%	15%	18%	18%	9%	13%
Packaged meats (such as hot dogs, sausage, lunch meat)	**12%**	13%	11%	18%	10%	10%	14%
Deli foods (freshly sliced meats or cheeses, dips, spreads)	**10%**	13%	7%	4%	8%	5%	15%
Fresh bakery items (such as fresh breads, muffins, cakes to order)	**9%**	8%	10%	34%	8%	7%	9%
Baby food	**5%**	7%	3%	*	*	3%	9%
Fresh prepared meals, salads or sandwiches	**5%**	5%	4%	*	4%	1%	8%

*= less than 0.5 percent of responses

TABLE A.16: ONLINE CATEGORY PURCHASE PREFERENCES BY INCOME AND PRIMARY CHANNEL

Q: Which, if any, of these types of grocery items have you ORDERED ONLINE during the PAST 12 MONTHS?

		Total family income			Primary channel		
Number of Shoppers: n=241	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
Health and beauty care products (shampoo, soap, makeup)	**37%**	29%	34%	42%	37%	37%	49%
Household cleaning products	**35%**	19%	40%	38%	35%	29%	34%
Packaged/canned foods (macaroni & cheese, soup, beans, pasta sauce)	**34%**	33%	28%	42%	35%	27%	24%
Salty snacks (such as bars, chips, crackers, nuts, popcorn, pretzels, trail mix)	**31%**	28%	30%	37%	37%	24%	28%
Paper products, such as paper towels or napkins	**31%**	32%	36%	25%	37%	38%	23%
Sweets (such as chocolate, cookies, candy, ice cream)	**30%**	44%	24%	28%	32%	23%	27%
Condiments (such as ketchup, BBQ sauce, salad dressings)	**28%**	28%	26%	29%	35%	17%	16%
Pet food or treats	**26%**	24%	30%	24%	31%	25%	9%
Baking/cooking items (such as flour, sugar, salt, cake mixes, cooking oil)	**25%**	33%	22%	26%	29%	28%	18%
Non-prescription drugs	**20%**	19%	16%	25%	20%	29%	7%
Frozen foods (such as entrees, meats, pizzas, frozen fruit/vegetables)	**19%**	27%	21%	11%	20%	13%	19%
Refrigerated dairy foods (such as cheese, butter, eggs, yogurt)	**17%**	18%	22%	8%	18%	8%	9%
Fresh produce (such as fruits and vegetables)	**16%**	21%	17%	8%	18%	13%	13%
Bulk foods	**15%**	14%	16%	15%	10%	17%	21%
Milk, or non-dairy substitutes	**15%**	16%	15%	14%	14%	20%	11%
Packaged breads (such as packaged bagels, hamburger/hot dog buns)	**15%**	17%	13%	14%	16%	10%	15%
Fresh meats and seafood	**13%**	14%	15%	7%	13%	12%	6%
Packaged meats (such as hot dogs, sausage, lunch meat)	**12%**	13%	16%	8%	14%	9%	8%
Deli foods (freshly sliced meats or cheeses, dips, spreads)	**10%**	9%	16%	2%	11%	5%	15%
Fresh bakery items (such as fresh breads, muffins, cakes to order)	**9%**	12%	13%	4%	8%	6%	7%
Baby food	**5%**	1%	6%	7%	4%	9%	6%
Fresh prepared meals, salads or sandwiches	**5%**	5%	7%	*	5%	4%	*

*= less than 0.5 percent of responses

TABLE A.17: HOW CONSUMERS ENGAGE WITH RETAILERS

Q: In which of the following ways have you engaged with a supermarket or grocery store in the past 12 MONTHS?

		Gender		Age cohort			
Number of Shoppers: n=1,005	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Used a rewards card or account which keeps track of my purchases	**52%**	49%	55%	56%	52%	54%	49%
Signed up to receive newsletters at my email or home address	**22%**	24%	20%	22%	21%	23%	23%
Signed up to receive email or printed newsletters customized to my interests	**19%**	20%	19%	22%	16%	19%	22%
Used a phone app that my grocery store provides	**17%**	17%	16%	4%	13%	17%	24%
Submitted a contest entry with my phone number or address	**12%**	13%	12%	11%	11%	13%	14%
Followed/liked my store through an online social network (Facebook, Twitter, Instagram, etc.)	**9%**	10%	8%	1%	4%	9%	17%
Provided my phone number for text messages	**6%**	6%	5%	1%	3%	5%	10%
Maintained a health profile with an in-store dietitian or nutritionist	**2%**	3%	1%	1%	*	1%	4%
None of the above	**32%**	34%	30%	36%	38%	29%	26%

		Total family income			Primary channel		
Number of Shoppers: n=1,005	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Used a rewards card or account which keeps track of my purchases	**52%**	46%	54%	58%	58%	47%	65%
Signed up to receive newsletters at my email or home address	**22%**	19%	22%	26%	24%	17%	30%
Signed up to receive email or printed newsletters customized to my interests	**19%**	15%	21%	23%	22%	14%	22%
Used a phone app that my grocery store provides	**17%**	13%	15%	26%	19%	17%	22%
Submitted a contest entry with my phone number or address	**12%**	14%	12%	12%	16%	7%	14%
Followed/liked my store through an online social network (Facebook, Twitter, Instagram, etc.)	**9%**	11%	8%	9%	8%	9%	18%
Provided my phone number for text messages	**6%**	5%	6%	7%	5%	6%	14%
Maintained a health profile with an in-store dietitian or nutritionist	**2%**	2%	3%	1%	2%	3%	*
None of the above	**32%**	37%	30%	22%	26%	40%	20%

* = Less than 0.5 percent of responses

TABLE A.18: SOCIAL MEDIA USED TO ENGAGE WITH FOOD CULTURE

Q: Thinking about all the ways you plan, shop for, enjoy and share FOOD EXPERIENCES, which of these social networking and other tools have you used for something food-related at least ONCE A MONTH?

		Gender		Age cohort			
Number of Shoppers: n=1,005	**Total**	**Male**	**Female**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**
Facebook	**33%**	26%	39%	12%	26%	36%	43%
Pinterest	**19%**	10%	27%	7%	14%	18%	29%
Search via Google, Bing or Yahoo!	**17%**	15%	19%	7%	11%	20%	24%
YouTube	**12%**	15%	10%	4%	8%	9%	21%
Texting	**10%**	8%	11%	3%	5%	9%	17%
Instagram	**6%**	6%	7%	3%	1%	3%	15%
Twitter	**4%**	6%	3%	4%	2%	5%	6%
Snapchat	**3%**	5%	2%	*	*	1%	9%
Other blogs	**3%**	2%	4%	2%	1%	2%	5%
Foursquare	**1%**	2%	1%	1%	*	2%	3%
Tumblr	**1%**	1%	1%	1%	*	*	2%
None of the above	**47%**	55%	40%	80%	62%	41%	27%

		Total family income			Primary channel		
Number of Shoppers: n=1,005	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
Facebook	**33%**	34%	33%	34%	29%	34%	35%
Pinterest	**19%**	20%	19%	18%	20%	19%	29%
Search via Google, Bing or Yahoo!	**17%**	15%	18%	18%	18%	17%	27%
YouTube	**12%**	16%	12%	9%	11%	13%	20%
Texting	**10%**	10%	10%	10%	9%	12%	9%
Instagram	**6%**	6%	6%	5%	5%	6%	4%
Twitter	**4%**	4%	5%	4%	4%	3%	3%
Snapchat	**3%**	3%	3%	2%	3%	4%	5%
Other blogs	**3%**	2%	3%	4%	3%	2%	2%
Foursquare	**1%**	1%	3%	1%	1%	*	10%
Tumblr	**1%**	1%	1%	2%	*	2%	2%
None of the above	**47%**	46%	46%	49%	50%	45%	41%

* = Less than 0.5 percent of responses

TABLE A.19: CONSUMER SHOPPING RESPONSIBILITY

	Total	Gender: Male	Gender: Female	Age cohort: Matures 71+	Age cohort: Boomers 52-70	Age cohort: Gen X 38-51	Age cohort: Millennials 18-37
Which best describes your level of responsibility for shopping for grocery type items, such as food, beverages, paper goods, cleaning items, etc. for use in your household? n=2,061							
I have all or most of the responsibility to shop for groceries	**70%**	57%	80%	78%	73%	71%	63%
I share at least 50% responsibility to shop for groceries	**30%**	43%	20%	22%	27%	29%	37%
Would you say you are your household's primary decision-maker and shopper when it comes to groceries? n=2,061							
Yes, I am the main/primary grocery shopper and decision-maker for my household	**78%**	68%	87%	83%	79%	82%	74%
There is no primary shopper, I'm as involved in the decision making and shopping for groceries as anyone else in my house	**12%**	17%	9%	7%	13%	10%	15%
No, I am a secondary decision-maker and shopper for my household's groceries	**9%**	15%	5%	10%	8%	8%	11%
Besides yourself, which other adult in your household is most responsible for shopping for groceries? n=1,602							
My spouse or long-term partner	**63%**	73%	55%	63%	68%	65%	57%
No other adult is responsible in any way	**20%**	11%	28%	23%	23%	24%	15%
Another family member living at home	**9%**	10%	9%	2%	4%	5%	19%
A roommate	**4%**	4%	3%	1%	1%	3%	8%
An adult child living at home	**3%**	1%	5%	9%	4%	2%	1%
Other	*	1%	*	2%	*	*	*

	Total	Total family income: Under $35K	Total family income: $35K-$99,999	Total family income: $100K or more	Primary channel: Super-market	Primary channel: Super-center	Primary channel: Club Store
Which best describes your level of responsibility for shopping for grocery type items, such as food, beverages, paper goods, cleaning items, etc. for use in your household? n=2,061							
I have all or most of the responsibility to shop for groceries	**70%**	78%	69%	62%	71%	72%	63%
I share at least 50% responsibility to shop for groceries	**30%**	22%	31%	38%	29%	28%	37%
Would you say you are your household's primary decision-maker and shopper when it comes to groceries? n=2,061							
Yes, I am the main/primary grocery shopper and decision-maker for my household	**78%**	84%	78%	76%	80%	78%	78%
There is no primary shopper, I'm as involved in the decision making and shopping for groceries as anyone else in my house	**12%**	9%	13%	15%	13%	13%	13%
No, I am a secondary decision-maker and shopper for my household's groceries	**9%**	7%	9%	9%	8%	9%	9%
Besides yourself, which other adult in your household is most responsible for shopping for groceries? n=1,602							
My spouse or long-term partner	**63%**	48%	66%	72%	65%	59%	67%
No other adult is responsible in any way	**20%**	27%	20%	18%	21%	23%	20%
Another family member living at home	**9%**	14%	8%	4%	9%	10%	6%
A roommate	**4%**	7%	2%	3%	3%	5%	5%
An adult child living at home	**3%**	5%	3%	3%	2%	3%	2%
Other	*	*	1%	*	*	1%	*

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.20: REASONS FOR SHARING SHOPPING RESPONSIBILITIES

Q: Which of these are important reasons you share responsibility for shopping, instead of one person doing it all?

		Gender		Shopper Type			
Number of Shoppers: n=642	**Total**	**Male**	**Female**	**Primary**	**Secondary**	**Shared**	**Total Co-shopper**
One of us sometimes is closer to a store	**36%**	32%	41%	37%	42%	34%	36%
Our schedules vary, changing how much time or flexibility we each have	**34%**	36%	33%	29%	39%	38%	34%
Simply a matter of fairness – one person shouldn't have to do it all	**33%**	42%	24%	18%	49%	44%	33%
We have different tastes in food	**33%**	33%	33%	28%	38%	36%	33%
We have different skills when it comes to shopping	**20%**	26%	14%	16%	33%	19%	20%
We each keep track of different things in the house	**18%**	21%	14%	14%	27%	18%	18%
We have different health requirements	**17%**	17%	16%	14%	18%	20%	17%
We share a home, but each shops for and consumes our own food and groceries separately	**11%**	10%	12%	10%	12%	11%	11%

		Total family income			Primary channel		
Number of Shoppers: n=642	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
One of us sometimes is closer to a store	**36%**	26%	37%	40%	39%	39%	32%
Our schedules vary, changing how much time or flexibility we each have	**34%**	28%	38%	37%	34%	36%	23%
Simply a matter of fairness – one person shouldn't have to do it all	**33%**	40%	29%	33%	31%	34%	55%
We have different tastes in food	**33%**	39%	32%	32%	31%	33%	17%
We have different skills when it comes to shopping	**20%**	21%	19%	20%	22%	17%	34%
We each keep track of different things in the house	**18%**	24%	16%	14%	15%	26%	17%
We have different health requirements	**17%**	15%	18%	15%	11%	20%	16%
We share a home, but each shops for and consumes our own food and groceries separately	**11%**	17%	9%	11%	10%	14%	*

		Age Cohort				***Older Millennials***	***Younger Millennials***
Number of Shoppers: n=642	**Total**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**	***28-37***	***18-27***
One of us sometimes is closer to a store	**36%**	24%	39%	44%	31%	*34%*	*27%*
Our schedules vary, changing how much time or flexibility we each have	**34%**	7%	29%	39%	40%	*39%*	*40%*
Simply a matter of fairness – one person shouldn't have to do it all	**33%**	47%	31%	26%	37%	*33%*	*42%*
We have different tastes in food	**33%**	22%	29%	34%	38%	*29%*	*49%*
We have different skills when it comes to shopping	**20%**	15%	22%	19%	20%	*24%*	*15%*
We each keep track of different things in the house	**18%**	13%	18%	15%	20%	*13%*	*28%*
We have different health requirements	**17%**	15%	17%	14%	19%	*16%*	*21%*
We share a home, but each shops for and consumes our own food and groceries separately	**11%**	6%	8%	8%	16%	*15%*	*17%*

* = Less than 0.5 percent of responses

TABLE A.21: EASE OF SHARING SHOPPING RESPONSIBILITIES

Q: Which of these BEST describes your household when it comes to sharing or splitting responsibilities for shopping?

Number of Shoppers: n=642	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
We do this very well, it goes smoothly	**72%**	71%	73%	77%	78%	70%	67%
We do this somewhat well	**25%**	27%	23%	20%	21%	26%	29%
This is mostly a struggle, it's often challenging	**2%**	2%	3%	3%	2%	2%	3%
It's currently not working well at all, we urgently need to change how we're doing this	**1%**	*	1%	*	*	2%	1%

Number of Shoppers: n=642	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
We do this very well, it goes smoothly	**72%**	70%	73%	71%	67%	74%	71%
We do this somewhat well	**25%**	23%	26%	26%	30%	23%	23%
This is mostly a struggle, it's often challenging	**2%**	4%	1%	3%	3%	2%	6%
It's currently not working well at all, we urgently need to change how we're doing this	**1%**	3%	*	*	1%	*	*

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.22: CHALLENGES WITH GROCERY SHOPPING RESPONSIBILITIES

Q: Some households face challenges or problems when it comes to splitting up their grocery shopping. How much of a problem is each of these for you?

Number of Shoppers: n=642	Big problem	Little problem	Not a problem
The other shopper(s) in my household spend(s) more money than they should	7%	25%	68%
Because we don't know what's needed, we waste trips to the store	4%	16%	80%
The other shopper(s) in my household choose the wrong brand/version/item	4%	21%	75%
With more than one managing the food, it's hard to keep track of what we need	2%	18%	80%
The way we split things up is unfair	2%	8%	90%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.23: WHO IS A LIST MAKER AND WHEN

		Gender		Age cohort			
	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Do you typically make a grocery list when buying grocery type items? n=2,061							
Yes	**78%**	72%	83%	82%	80%	78%	76%
No	**22%**	28%	17%	18%	20%	22%	24%
Do you usually make the list... (Among grocery list makers)? n=1,641							
Throughout the week in between trips as items run out	**60%**	55%	64%	75%	64%	61%	51%
Right before going to the store	**38%**	44%	34%	22%	35%	39%	46%
Some other time	**1%**	1%	2%	2%	1%	1%	2%

		Total family income			Primary channel		
	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Do you typically make a grocery list when buying grocery type items?							
Yes	**78%**	74%	79%	83%	79%	80%	79%
No	**22%**	26%	21%	17%	21%	20%	21%
Do you usually make the list... (Among grocery list makers)?							
Throughout the week in between trips as items run out	**60%**	56%	63%	63%	59%	59%	72%
Right before going to the store	**38%**	43%	36%	37%	40%	40%	28%
Some other time	**1%**	2%	2%	*	1%	1%	*

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.24: LIST MAKING BEHAVIORS

Q: Which of the following, if any, do you do when making your list? (Among grocery list makers).

		Gender		Age cohort			
Number of Shoppers: n=1,641	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Check the pantry/fridge on what is needed	**82%**	79%	84%	77%	82%	84%	81%
Ask others in your household if they need anything	**58%**	58%	57%	43%	55%	60%	63%
Research sales specials and choose items that are on sale	**53%**	50%	55%	53%	57%	52%	49%
Check recipes for items needed	**46%**	39%	50%	29%	40%	47%	56%
Plan out a number of meals and record items needed	**37%**	37%	37%	15%	27%	41%	52%
Have different lists for different stores at the same time	**35%**	31%	38%	32%	35%	35%	35%

		Total family income			Primary channel		
Number of Shoppers: n=1,641	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Check the pantry/fridge on what is needed	**82%**	79%	84%	83%	83%	87%	75%
Ask others in your household if they need anything	**58%**	45%	61%	71%	56%	64%	68%
Research sales specials and choose items that are on sale	**53%**	56%	54%	46%	57%	45%	51%
Check recipes for items needed	**46%**	41%	45%	54%	47%	46%	40%
Plan out a number of meals and record items needed	**37%**	32%	38%	43%	38%	35%	27%
Have different lists for different stores at the same time	**35%**	32%	35%	39%	33%	28%	50%

TABLE A.25: CREATING A GROCERY LIST

Q: When making and keeping your grocery shopping list, which do you typically use?

Number of Shoppers: n=1,641	Total	Gender: Male	Gender: Female	Age cohort: Matures 71+	Age cohort: Boomers 52-70	Age cohort: Gen X 38-51	Age cohort: Millennials 18-37
Paper list created by me/us	**88%**	85%	91%	93%	92%	89%	83%
Paper list on flyer/handout from store	**10%**	10%	10%	9%	12%	7%	11%
List feature on store's website or app	**9%**	10%	8%	6%	9%	9%	9%
Digital tool/service I happen to use for lists (such as Dropbox or Evernote, etc.)	**5%**	6%	5%	*	2%	4%	12%
Digital tool/service for grocery lists (such as Out-Of-Milk, Buy-Me-A-Pie, Grocery IQ)	**5%**	6%	3%	1%	3%	5%	8%
Digital tool/service made for lists in general (such as Cozi, Google Keep, Remember-The-Milk, Wunderlist, AnyList)	**4%**	7%	2%	1%	1%	4%	8%

Number of Shoppers: n=1,641	Total	Total family income: Under $35K	Total family income: $35K-$99,999	Total family income: $100K or more	Primary channel: Super-market	Primary channel: Super-center	Primary channel: Club Store
Paper list created by me/us	**88%**	90%	90%	86%	88%	92%	85%
Paper list on flyer/handout from store	**10%**	10%	10%	8%	10%	8%	15%
List feature on store's website or app	**9%**	9%	9%	10%	11%	5%	14%
Digital tool/service I happen to use for lists (such as Dropbox or Evernote, etc.)	**5%**	3%	6%	9%	5%	5%	7%
Digital tool/service for grocery lists (such as Out-Of-Milk, Buy-Me-A-Pie, Grocery IQ)	**5%**	2%	5%	6%	4%	4%	7%
Digital tool/service made for lists in general (such as Cozi, Google Keep, Remember-The-Milk, Wunderlist, AnyList)	**4%**	4%	4%	4%	3%	4%	8%

* = Less than 0.5 percent of responses

TABLE A.26: SHOPPING PLANNING

Q: When planning your grocery shopping, how often do you...? Top-2 box (Fairly often/Almost every time)

		Gender		Age cohort			
Number of Shoppers: n=2,061	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Make a shopping list	**75%**	68%	81%	78%	77%	76%	71%
Look for grocery specials in newspapers or in advertising inserts (circulars) that are in newspapers or are delivered to your door	**52%**	47%	57%	63%	57%	52%	45%
Look for cents-off coupons received in the mail or from newspapers/magazines	**49%**	41%	56%	65%	53%	49%	40%
Plan to combine trips to different (grocery) stores	**46%**	43%	49%	45%	45%	49%	47%
Read the circular and store specials the store emails to me	**45%**	40%	49%	59%	48%	42%	39%
Read the circular in the grocery store	**43%**	44%	42%	41%	43%	45%	41%
Compare grocery prices at different stores	**39%**	36%	42%	41%	40%	37%	40%
Bring a reusable or permanent shopping bag	**37%**	36%	39%	37%	39%	38%	35%
Go online in search of coupons or other discounts	**27%**	22%	31%	25%	22%	30%	31%
Check store websites for online grocery offerings	**26%**	24%	28%	21%	24%	31%	25%
Use a grocery app (e.g., to check for coupons, available services, contact info)	**21%**	20%	22%	10%	15%	24%	28%
Go online to look for recommendations and reviews on specific products or brands	**10%**	11%	9%	4%	5%	9%	17%

		Total family income			Primary channel		
Number of Shoppers: n=2,061	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Make a shopping list	**75%**	70%	77%	79%	75%	77%	76%
Look for grocery specials in newspapers or in advertising inserts (circulars) that are in newspapers or are delivered to your door	**52%**	51%	55%	47%	57%	45%	55%
Look for cents-off coupons received in the mail or from newspapers/magazines	**49%**	44%	51%	46%	54%	43%	48%
Plan to combine trips to different (grocery) stores	**46%**	43%	47%	49%	43%	41%	65%
Read the circular and store specials the store emails to me	**45%**	42%	47%	41%	47%	40%	50%
Read the circular in the grocery store	**43%**	43%	44%	38%	44%	42%	52%
Compare grocery prices at different stores	**39%**	41%	41%	32%	36%	37%	52%
Bring a reusable or permanent shopping bag	**37%**	33%	39%	39%	37%	25%	41%
Go online in search of coupons or other discounts	**27%**	24%	29%	25%	29%	26%	24%
Check store websites for online grocery offerings	**26%**	27%	27%	21%	28%	21%	26%
Use a grocery app (e.g., to check for coupons, available services, contact info)	**21%**	17%	22%	25%	22%	19%	30%
Go online to look for recommendations and reviews on specific products or brands	**10%**	7%	11%	11%	9%	8%	17%

TABLE A.27: TRENDED PRE-TRIP ACTIVITIES

Q: When planning your grocery shopping, how often do you…?

	2016				2015	
Number of Shoppers: n=2,061	Almost Every Time	Fairly Often	Occasionally	Never	Almost Every Time	Never
Make a shopping list	57%	18%	14%	11%	56%	9%
Look for grocery specials in newspapers or advertising inserts that are in the newspapers or are delivered to your door	30%	22%	25%	22%	31%	23%
Look for cents-off coupons received in the mail or from newspapers/circulars	27%	22%	26%	25%	30%	22%
Bring a reusable/permanent shopping bag	23%	14%	22%	41%	26%	38%
Read the circular and store specials the store emails to me	23%	22%	25%	31%	25%	31%
Plan to combine trips to different (grocery) stores	21%	26%	30%	23%	21%	23%
Read the circular in the grocery store	21%	22%	33%	25%	20%	26%
Compare grocery prices at diff. stores	17%	22%	32%	29%	17%	29%
Go online in search of coupons or other discounts	13%	14%	29%	43%	13%	42%
Check website for online grocery offerings	12%	14%	23%	51%	11%	51%
Use a grocery app (e.g., to check for coupons, services, contact info)	10%	11%	17%	62%	8%	69%
Look online for recommendations	3%	7%	26%	64%	2%	69%

Note: Percentages may not add to 100% due to rounding

TABLE A.28: TRENDED IN-STORE MONEY SAVING MEASURES

Q: When you grocery shop, how often do you…?

	2016				2015	
Number of Shoppers: n=1,056	Almost Every Time	Fairly Often	Occasionally	Never	Almost Every Time	Never
Participate in frequent shopper or savings club programs	35%	18%	21%	25%	33%	28%
Buy store brands or lower priced brands instead of the national brands	26%	35%	34%	5%	20%	5%
Stock up on an item when you find a bargain	26%	37%	32%	5%	22%	6%
Use cents-off coupons received in store	24%	23%	36%	17%	19%	17%
Use a reusable/permanent shopping bag	22%	15%	26%	37%	25%	33%
Compare products	21%	35%	33%	11%	18%	11%
Use coupons found online	19%	19%	32%	30%	16%	32%
Buy only what's on your list	15%	36%	30%	19%	14%	17%
Buy products on special, even if you hadn't planned to buy them that day	12%	36%	45%	7%	10%	7%
Go to stores other than your primary store for advertised specials	10%	23%	44%	23%	9%	23%
Buy in larger package sizes	9%	28%	48%	15%	10%	14%
Use mail-in rebates for cash refunds	6%	12%	34%	48%	5%	49%
Use mobile technology to compare prices for similar items at other stores	6%	8%	22%	64%	3%	74%
Use mobile technology to learn more about an item you are considering	6%	8%	24%	62%	3%	71%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.29: PURCHASE BEHAVIOR BY GENDER AND AGE COHORT

Q: When you grocery shop, how often do you? Top-2 Box (Almost Every Time/Fairly Often).

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Stock up on an item when you find a bargain	**62%**	58%	65%	63%	60%	64%	63%
Buy store brands or lower priced brands instead of national brands	**62%**	61%	63%	54%	55%	62%	72%
Compare products to one another (different brands, or national brand versus store brand)	**56%**	52%	58%	50%	53%	60%	57%
Participate in supermarket frequent shopper or savings club programs	**54%**	48%	58%	49%	49%	59%	56%
Buy only what's on your list	**51%**	53%	49%	56%	50%	49%	52%
Buy products on special, even if you hadn't planned to buy them that day	**48%**	43%	51%	38%	45%	52%	50%
Use cents-off coupons received in the store, such as off the shelf, at checkout, or at a kiosk	**47%**	39%	54%	61%	44%	50%	45%
Use coupons or other discounts found on the Internet	**38%**	30%	44%	43%	31%	43%	41%
Use a reusable or permanent shopping bag	**37%**	33%	40%	42%	37%	39%	35%
Buy in larger package sizes	**37%**	40%	35%	21%	28%	42%	47%
Go to stores other than your primary grocery store for advertised specials	**33%**	31%	35%	26%	34%	37%	32%
Use mail-in rebates for cash refunds	**18%**	17%	19%	22%	17%	20%	18%
Use mobile technology (phone, tablet computer, etc.) to compare prices for similar items at other stores	**14%**	13%	15%	6%	6%	15%	25%
Use mobile technology (phone, tablet computer, etc.) to learn more about an item you are considering	**14%**	14%	14%	4%	5%	17%	25%

TABLE A.30: PURCHASE BEHAVIOR BY INCOME AND PRIMARY CHANNEL

Q: When you grocery shop, how often do you? Top-2 Box (Almost Every Time/Fairly Often).

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Stock up on an item when you find a bargain	**62%**	56%	65%	62%	64%	56%	67%
Buy store brands or lower priced brands instead of national brands	**62%**	65%	62%	56%	59%	62%	74%
Compare products to one another (different brands, or national brand versus store brand)	**56%**	49%	57%	60%	55%	57%	64%
Participate in supermarket frequent shopper or savings club programs	**54%**	41%	59%	58%	63%	44%	56%
Buy only what's on your list	**51%**	51%	50%	50%	51%	51%	43%
Buy products on special, even if you hadn't planned to buy them that day	**48%**	41%	50%	53%	50%	42%	46%
Use cents-off coupons received in the store, such as off the shelf, at checkout, or at a kiosk	**47%**	39%	50%	47%	50%	46%	48%
Use coupons or other discounts found on the Internet	**38%**	30%	42%	34%	40%	39%	38%
Use a reusable or permanent shopping bag	**37%**	36%	37%	37%	41%	24%	32%
Buy in larger package sizes	**37%**	30%	39%	43%	32%	38%	79%
Go to stores other than your primary grocery store for advertised specials	**33%**	31%	36%	28%	31%	37%	36%
Use mail-in rebates for cash refunds	**18%**	17%	18%	18%	17%	19%	31%
Use mobile technology (phone, tablet computer, etc.) to compare prices for similar items at other stores	**14%**	12%	13%	16%	12%	16%	17%
Use mobile technology (phone, tablet computer, etc.) to learn more about an item you are considering	**14%**	10%	15%	16%	13%	15%	22%

TABLE A.31: PURCHASE BEHAVIOR BY SHOPPER TYPE

Q: When you grocery shop, how often do you? Top-2 Box (Almost Every Time/Fairly Often).

Number of Shoppers: n=1,056	Total	Shopper Type			
		Self	Primary	Secondary	Shared
Stock up on an item when you find a bargain	**62%**	55%	67%	71%	59%
Buy store brands or lower priced brands instead of national brands	**62%**	57%	61%	64%	68%
Compare products to one another (different brands, or national brand versus store brand)	**56%**	48%	62%	52%	53%
Participate in supermarket frequent shopper or savings club programs	**54%**	51%	57%	50%	51%
Buy only what's on your list	**51%**	49%	51%	53%	52%
Buy products on special, even if you hadn't planned to buy them that day	**48%**	39%	51%	48%	51%
Use cents-off coupons received in the store, such as off the shelf, at checkout, or at a kiosk	**47%**	38%	56%	34%	44%
Use coupons or other discounts found on the Internet	**38%**	29%	47%	34%	32%
Use a reusable or permanent shopping bag	**37%**	35%	38%	30%	40%
Buy in larger package sizes	**37%**	27%	41%	43%	37%
Go to stores other than your primary grocery store for advertised specials	**33%**	28%	37%	41%	29%
Use mail-in rebates for cash refunds	**18%**	16%	20%	25%	15%
Use mobile technology (phone, tablet computer, etc.) to compare prices for similar items at other stores	**14%**	10%	17%	20%	11%
Use mobile technology (phone, tablet computer, etc.) to learn more about an item you are considering	**14%**	9%	17%	20%	13%

TABLE A.32: SPENDING BEHAVIOR CHANGES

Number of Shoppers: n=1,056	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
How has your grocery spending changed in the past year?							
I am spending about the same on groceries	**50%**	54%	46%	51%	54%	52%	42%
I am spending more on groceries	**33%**	34%	33%	38%	30%	31%	38%
I am spending less on groceries	**17%**	12%	21%	11%	16%	17%	20%
Over the past year, have you started shopping at a different grocery store for some or all of your groceries, specifically because of its lower prices?							
No	**53%**	53%	52%	65%	56%	50%	47%
Yes, I occasionally will pick up items at a different store because of the price	**40%**	40%	40%	33%	39%	45%	39%
Yes, I completely switched to a new, cheaper store	**7%**	7%	7%	1%	5%	5%	14%

Number of Shoppers: n=1,056	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
How has your grocery spending changed in the past year?							
I am spending about the same on groceries	**50%**	46%	51%	50%	50%	49%	54%
I am spending more on groceries	**33%**	31%	32%	40%	35%	33%	30%
I am spending less on groceries	**17%**	23%	17%	11%	15%	18%	16%
Over the past year, have you started shopping at a different grocery store for some or all of your groceries, specifically because of its lower prices?							
No	**53%**	50%	51%	61%	55%	55%	53%
Yes, I occasionally will pick up items at a different store because of the price	**40%**	42%	43%	32%	41%	38%	42%
Yes, I completely switched to a new, cheaper store	**7%**	8%	6%	8%	4%	7%	5%

Note: Percentages may not add to 100% due to rounding

TABLE A.33: SPENDING STRATEGY CHANGES

Q: Using the following list, please indicate how your current buying strategies at the grocery store have changed or not changed, compared to a year ago.

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
I only purchase what I need/I make fewer impulse purchases	**42%**	40%	44%	43%	47%	38%	40%
Compare items more often	**36%**	34%	38%	33%	39%	35%	35%
I eat more leftovers or use leftovers to make other meals	**36%**	33%	38%	41%	37%	27%	40%
I use more coupons	**34%**	29%	37%	34%	34%	30%	36%
I purchase fewer luxurious food items	**31%**	32%	31%	40%	31%	27%	33%
Look more at price per ounce	**29%**	31%	27%	25%	32%	25%	28%
I buy more fresh, perishable items	**21%**	20%	23%	16%	23%	22%	20%
I purchase fewer food items overall	**19%**	18%	20%	23%	21%	16%	19%
I purchase more large size or bulk items	**18%**	19%	18%	8%	16%	17%	25%
I buy more canned, frozen, or boxed food items as opposed to fresh, non-preserved food	**16%**	17%	14%	12%	15%	15%	19%
I purchase cheaper meat and/or fish	**15%**	15%	14%	10%	15%	15%	15%
I purchase less meat and fish	**14%**	13%	14%	21%	16%	13%	10%
I purchase less organic and/or local products	**7%**	7%	7%	6%	7%	7%	6%
I buy more fresh, prepared foods (e.g., from deli, from chilled ready to go meals case)	**6%**	8%	4%	7%	4%	7%	6%
Nothing has changed in the past year	**20%**	22%	18%	29%	19%	24%	14%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
I only purchase what I need/I make fewer impulse purchases	**42%**	50%	41%	34%	43%	41%	33%
Compare items more often	**36%**	38%	35%	36%	37%	36%	35%
I eat more leftovers or use leftovers to make other meals	**36%**	41%	36%	28%	36%	36%	25%
I use more coupons	**34%**	34%	33%	28%	37%	33%	24%
I purchase fewer luxurious food items	**31%**	38%	30%	25%	28%	34%	38%
Look more at price per ounce	**29%**	30%	27%	31%	31%	26%	22%
I buy more fresh, perishable items	**21%**	18%	19%	34%	22%	18%	13%
I purchase fewer food items overall	**19%**	24%	19%	12%	18%	19%	17%
I purchase more large size or bulk items	**18%**	19%	19%	14%	17%	20%	26%
I buy more canned, frozen, or boxed food items as opposed to fresh, non-preserved food	**16%**	25%	14%	6%	14%	18%	14%
I purchase cheaper meat and/or fish	**15%**	23%	11%	9%	12%	17%	16%
I purchase less meat and fish	**14%**	19%	14%	6%	14%	18%	7%
I purchase less organic and/or local products	**7%**	7%	7%	6%	7%	5%	7%
I buy more fresh, prepared foods (e.g., from deli, from chilled ready to go meals case)	**6%**	6%	4%	10%	7%	3%	3%
Nothing has changed in the past year	**20%**	16%	21%	22%	18%	21%	26%

TABLE A.34: PRE-SHOP PLANNING AND COMMUNICATION

Q: How does your household make sure that needed items are purchased from the grocery store?

Number of Shoppers: n=792	Total	Gender: Male	Gender: Female	Age cohort: Matures 71+	Age cohort: Boomers 52-70	Age cohort: Gen X 38-51	Age cohort: Millennials 18-37
There are some items we know are always needed	**60%**	57%	61%	57%	60%	60%	60%
We talk or adjust list right before someone goes to the store	**50%**	50%	51%	48%	50%	55%	48%
The shopper often knows what's needed without asking	**44%**	41%	47%	47%	48%	45%	40%
Household maintains an ongoing written list	**43%**	40%	46%	50%	52%	44%	33%
We call/text home when at the store	**35%**	35%	36%	12%	25%	41%	47%
We shop based on a recipe that someone can take with them or find at store	**15%**	18%	13%	6%	11%	15%	21%
Household maintains a list accessible through the Internet	**4%**	5%	4%	5%	4%	3%	5%
Store helps me track past purchases	**4%**	5%	2%	5%	1%	3%	7%

Number of Shoppers: n=792	Total	Total family income: Under $35K	Total family income: $35K-$99,999	Total family income: $100K or more	Primary channel: Super-market	Primary channel: Super-center	Primary channel: Club Store
There are some items we know are always needed	**60%**	63%	60%	57%	58%	60%	62%
We talk or adjust list right before someone goes to the store	**50%**	50%	51%	51%	50%	53%	39%
The shopper often knows what's needed without asking	**44%**	43%	46%	43%	45%	42%	54%
Household maintains an ongoing written list	**43%**	40%	42%	50%	44%	46%	38%
We call/text home when at the store	**35%**	30%	33%	46%	36%	37%	37%
We shop based on a recipe that someone can take with them or find at store	**15%**	16%	13%	18%	13%	17%	12%
Household maintains a list accessible through the Internet	**4%**	3%	3%	7%	4%	2%	7%
Store helps me track past purchases	**4%**	4%	4%	4%	4%	3%	7%

TABLE A.35: PRIVATE BRAND PURCHASE BEHAVIOR

Q: Thinking about private label or store brands at your grocery store, how often do you purchase private label/store brand...?

Number of Shoppers: n=varies (67-979)	Never	Occasionally	Fairly often	Almost every time	Top-2 Box Fairly often / Almost every time
Fresh produce (such as fruits and vegetables)	8%	27%	37%	29%	65%
Milk, or non-dairy substitutes	13%	25%	32%	31%	62%
Fresh bakery items (such as fresh breads, muffins, cakes to order)	5%	35%	36%	24%	61%
Fresh meats and seafood	14%	26%	37%	23%	60%
Packaged/canned foods (macaroni & cheese, soup, beans, pasta sauce)	7%	35%	42%	17%	58%
Refrigerated dairy foods (such as cheese, butter, eggs, yogurt)	10%	32%	36%	22%	58%
Paper products, such as paper towels or napkins	13%	34%	32%	21%	53%
Baby food	32%	18%	26%	24%	51%
Packaged breads (such as packaged bagels, hamburger/hot dog buns)	13%	37%	31%	19%	50%
Packaged meats (such as hot dogs, sausage, lunch meat)	14%	38%	31%	17%	48%
Fresh prepared meals, salads or sandwiches	7%	45%	32%	16%	48%
Frozen foods (such as entrees, meats, pizzas, frozen fruit/vegetables)	12%	41%	33%	15%	48%
Deli foods (freshly sliced meats or cheeses, dips, spreads)	14%	39%	32%	16%	48%
Non-prescription drugs	11%	42%	29%	17%	46%
Baking/cooking items (such as flour, sugar, salt, cake mixes, cooking oil)	9%	45%	33%	13%	46%
Condiments (such as ketchup, BBQ sauce, salad dressings)	14%	42%	31%	13%	44%
Bulk foods	7%	49%	30%	14%	44%
Salty snacks (such as bars, chips, crackers, nuts, popcorn, pretzels, trail mix)	14%	46%	29%	11%	40%
Sweets (such as chocolate, cookies, candy, ice cream)	18%	45%	27%	10%	37%
Household cleaning products	16%	48%	25%	11%	36%
Health and beauty care products (shampoo, soap, makeup)	24%	47%	21%	8%	30%
Pet food or treats	41%	31%	15%	12%	28%

TABLE A.36: SMARTPHONE USE AT GROCERY STORE

Q: While at the grocery store, how often do you use each of the following with your smartphone?

Number of Shoppers: n=731	Never, and would not be interested	Never, but would be interested	Occasionally do now	Frequently do now	Top-2 Box Occasionally do now / Frequently do now
Use digital coupons	19%	31%	30%	20%	49%
Look up recipes	31%	22%	33%	14%	47%
Check weekly sales specials at your primary store	27%	27%	27%	19%	46%
Read reviews of products and brands	39%	29%	24%	8%	32%
Scan QR codes or traditional barcodes of grocery type items to compare pricing across stores (for example, with Amazon)	41%	37%	17%	5%	23%
Use the in-store item locator	37%	42%	16%	6%	21%
Scan QR codes or traditional barcodes of grocery type items to learn more about their nutritional value	44%	36%	14%	6%	20%

Note: Percentages may not add to 100% due to rounding

TABLE A.37: WHO IS RESPONSIBLE FOR FOOD SHOPPING

Q: When it comes to SHOPPING for food, who is most responsible for DECIDING what to get for each of these?

Number of Shoppers: n=792	Only/Mostly me	It's about half and half	Another person does most/all
Snacks for me	77%	20%	3%
Kids lunch (n=312)	50%	34%	15%
Meals planned ahead of time	48%	36%	16%
Last-minute Dinner	48%	42%	11%
Weekday Dinner	47%	41%	12%
Lunch	47%	45%	8%
Trying something new	45%	43%	12%
Routine eating	45%	46%	9%
Meals	44%	45%	11%
Weekend Dinner	42%	44%	13%
Holiday occasions	40%	41%	20%
Entertaining guests	39%	43%	18%
Snacks for family	39%	51%	10%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.38: WHO IS RESPONSIBLE FOR PREPARING FOOD

Q: When it comes to PREPARING food, who tends to do the most of the food preparation for these NEEDS AND SITUATIONS?

Number of Shoppers: n=792	Only/Mostly me	It's about half and half	Another person does most/all
Snacks for me	77%	18%	5%
Meals planned ahead of time	50%	31%	19%
Last-minute Dinner	49%	37%	14%
Kids lunch (n=312)	49%	26%	25%
Weekday Dinner	48%	34%	18%
Trying something new	46%	40%	14%
Routine eating	46%	43%	12%
Meals	46%	37%	17%
Lunch	44%	44%	11%
Holiday occasions	43%	36%	21%
Weekend Dinner	42%	39%	18%
Entertaining guests	40%	43%	17%
Snacks for family	39%	51%	10%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.39: BREAKFAST FREQUENCY AND DINING OUT

Number of Shoppers: n=1,005	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
During an average week, how often do you eat breakfast? (Average number of days).	**5.1**	5.0	5.1	5.8	5.2	4.9	5.0
Over the past 4 weeks, what were all the ways you recall getting your BREAKFAST?							
Prepared and ate breakfast at home, using foods I purchased	**83%**	82%	84%	89%	90%	82%	74%
Prepared breakfast at home, ate at work or on the go	**31%**	30%	31%	14%	19%	30%	48%
Ate out at restaurant or cafeteria	**20%**	24%	16%	22%	17%	18%	23%
Got food from restaurant, ate at work or on the go	**12%**	15%	10%	*	12%	12%	17%
Brought home food from restaurant	**7%**	8%	6%	4%	6%	6%	10%
Brought home fresh-prepared food from store	**5%**	6%	3%	2%	2%	6%	7%
Got fresh-prepared foods from store, ate at work or on the go	**4%**	6%	3%	2%	3%	4%	7%
Ate at food store	**2%**	3%	2%	*	1%	1%	5%
Received home delivery of food prepared by restaurant or other food service	**1%**	2%	*	*	*	1%	2%
Net – Breakfast from home	**90%**	88%	91%	94%	91%	86%	90%
Net – Breakfast from food service	**30%**	36%	25%	23%	26%	28%	39%
Net – Breakfast from food retailer	**9%**	11%	6%	4%	5%	8%	14%

Number of Shoppers: n=1,005	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
During an average week, how often do you eat breakfast? (Average number of days).	**5.1**	4.8	5.1	5.4	5.2	5.0	5.7
Over the past 4 weeks, what were all the ways you recall getting your BREAKFAST?							
Prepared and ate breakfast at home, using foods I purchased	**83%**	82%	83%	81%	85%	80%	88%
Prepared breakfast at home, ate at work or on the go	**31%**	27%	32%	36%	30%	31%	32%
Ate out at restaurant or cafeteria	**20%**	12%	21%	28%	20%	24%	24%
Got food from restaurant, ate at work or on the go	**12%**	11%	13%	16%	14%	14%	2%
Brought home food from restaurant	**7%**	5%	9%	5%	5%	11%	2%
Brought home fresh-prepared food from store	**5%**	6%	4%	4%	3%	6%	6%
Got fresh-prepared foods from store, ate at work or on the go	**4%**	3%	5%	1%	3%	5%	5%
Ate at food store	**2%**	1%	2%	4%	*	3%	11%
Received home delivery of food prepared by restaurant or other food service	**1%**	*	2%	1%	1%	1%	5%
Net – Breakfast from home	**90%**	90%	89%	90%	91%	88%	96%
Net – Breakfast from food service	**30%**	21%	34%	39%	31%	35%	29%
Net – Breakfast from food retailer	**9%**	8%	9%	8%	6%	10%	15%

* = Less than 0.5 percent of responses

TABLE A.40: LUNCH FREQUENCY AND DINING OUT

Number of Shoppers: n=1,005	Total	Gender: Male	Gender: Female	Age cohort: Matures 71+	Age cohort: Boomers 52-70	Age cohort: Gen X 38-51	Age cohort: Millennials 18-37
During an average week, how often do you eat lunch? (Average number of days).	**5.6**	5.5	5.6	5.9	5.2	5.6	5.9
Over the past 4 weeks, what were all the ways you recall getting your LUNCH?							
Prepared and ate lunch at home, using foods I purchased	**73%**	69%	77%	92%	79%	68%	67%
Prepared lunch at home, ate at work or on the go	**39%**	39%	39%	12%	28%	45%	54%
Ate out at restaurant or cafeteria	**37%**	37%	36%	35%	30%	40%	41%
Got food from restaurant, ate at work or on the go	**18%**	20%	16%	6%	9%	19%	28%
Brought home food from restaurant	**15%**	16%	14%	3%	13%	13%	20%
Brought home fresh-prepared food from store	**9%**	9%	9%	4%	7%	8%	11%
Got fresh-prepared foods from store, ate at work or on the go	**8%**	10%	6%	4%	4%	9%	12%
Ate at food store	**4%**	5%	2%	2%	2%	2%	7%
Received home delivery of food prepared by restaurant or other food service	**3%**	3%	4%	2%	2%	2%	6%
Net – Lunch from home	**89%**	86%	92%	97%	89%	89%	88%
Net – Lunch from food service	**49%**	53%	46%	40%	40%	52%	60%
Net – Lunch from food retailer	**16%**	18%	14%	8%	12%	15%	24%

Number of Shoppers: n=1,005	Total	Total family income: Under $35K	Total family income: $35K-$99,999	Total family income: $100K or more	Primary channel: Super-market	Primary channel: Super-center	Primary channel: Club Store
During an average week, how often do you eat lunch? (Average number of days).	**5.6**	5.3	5.8	5.6	5.6	5.8	5.5
Over the past 4 weeks, what were all the ways you recall getting your LUNCH?							
Prepared and ate lunch at home, using foods I purchased	**73%**	78%	72%	66%	72%	74%	81%
Prepared lunch at home, ate at work or on the go	**39%**	36%	40%	45%	40%	37%	45%
Ate out at restaurant or cafeteria	**37%**	22%	39%	55%	39%	36%	35%
Brought home food from restaurant	**15%**	17%	17%	8%	13%	19%	7%
Got food from restaurant, ate at work or on the go	**18%**	14%	18%	23%	18%	18%	13%
Brought home fresh-prepared food from store	**9%**	9%	9%	9%	9%	8%	8%
Got fresh-prepared foods from store, ate at work or on the go	**8%**	6%	9%	5%	8%	8%	5%
Ate at food store	**4%**	2%	5%	3%	3%	3%	8%
Received home delivery of food prepared by restaurant or other food service	**3%**	3%	4%	2%	3%	4%	10%
Net – Lunch from home	**89%**	91%	89%	88%	88%	90%	89%
Net – Lunch from food service	**49%**	38%	52%	62%	50%	51%	47%
Net – Lunch from food retailer	**16%**	14%	19%	15%	16%	14%	14%

TABLE A.41: DINNER FREQUENCY AND DINING OUT

Number of Shoppers: n=1,005	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
During an average week, how often do you eat dinner? (Average number of days).	**6.5**	6.5	6.5	6.5	6.6	6.5	6.5
Over the past 4 weeks, what were all the ways you recall getting your DINNER?							
Prepared and ate dinner at home, using foods I purchased	**89%**	85%	92%	90%	93%	89%	83%
Ate out at restaurant or cafeteria	**47%**	49%	46%	45%	48%	47%	47%
Brought home food from restaurant	**33%**	31%	35%	22%	35%	33%	35%
Prepared dinner at home, ate at work or on the go	**19%**	24%	15%	7%	11%	16%	33%
Brought home fresh-prepared food from store	**15%**	14%	16%	18%	16%	15%	14%
Received home delivery of food prepared by restaurant or other food service	**11%**	12%	10%	8%	6%	11%	17%
Got food from restaurant, ate at work or on the go	**11%**	12%	9%	2%	6%	8%	20%
Got fresh-prepared foods from store, ate at work or on the go	**6%**	7%	5%	7%	5%	6%	8%
Ate at food store	**3%**	5%	1%	2%	*	2%	6%
Net – Dinner from home	**98%**	97%	98%	96%	98%	98%	98%
Net – Dinner from food service	**64%**	66%	62%	56%	61%	64%	70%
Net – Dinner from food retailer	**21%**	22%	20%	25%	19%	20%	24%

Number of Shoppers: n=1,005	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
During an average week, how often do you eat dinner? (Average number of days).	**6.5**	6.4	6.6	6.5	6.6	6.5	6.6
Over the past 4 weeks, what were all the ways you recall getting your DINNER?							
Prepared and ate dinner at home, using foods I purchased	**89%**	87%	88%	89%	91%	84%	87%
Ate out at restaurant or cafeteria	**47%**	32%	49%	71%	50%	48%	56%
Brought home food from restaurant	**33%**	26%	34%	42%	35%	34%	31%
Prepared dinner at home, ate at work or on the go	**19%**	19%	20%	18%	16%	21%	15%
Brought home fresh-prepared food from store	**15%**	11%	19%	16%	18%	14%	14%
Received home delivery of food prepared by restaurant or other food service	**11%**	7%	13%	12%	15%	7%	14%
Got food from restaurant, ate at work or on the go	**11%**	8%	11%	13%	10%	9%	11%
Got fresh-prepared foods from store, ate at work or on the go	**6%**	4%	6%	9%	6%	6%	9%
Ate at food store	**3%**	2%	3%	3%	2%	4%	6%
Net – Dinner from home	**98%**	98%	97%	99%	98%	97%	96%
Net – Dinner from food service	**64%**	48%	67%	85%	66%	66%	67%
Net – Dinner from food retailer	**21%**	16%	24%	24%	23%	21%	25%

* = Less than 0.5 percent of responses

TABLE A.42: DINNER PREPARATION FREQUENCY AND SOURCING

Number of Shoppers: n=1,005	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
How many times a week do you/someone else in your household prepare your main evening meal at home (do not include takeout, ordering in or drive-thru)?							
7 times per week	**26%**	26%	27%	29%	32%	24%	21%
6 times per week	**21%**	19%	22%	25%	22%	24%	17%
5 times per week	**24%**	26%	22%	21%	25%	22%	24%
4 times per week	**11%**	11%	11%	10%	7%	10%	16%
3 times per week	**7%**	8%	7%	3%	5%	10%	9%
2 times per week	**4%**	4%	4%	4%	3%	5%	6%
1 time per week	**2%**	2%	2%	5%	1%	1%	2%
Less often than once a week	**2%**	1%	2%	2%	2%	1%	1%
Never	**3%**	3%	3%	*	2%	3%	3%
Compared to a year ago, would you say your household now has…?							
MORE dinners being prepared at home	**38%**	35%	40%	16%	30%	36%	54%
FEWER dinners being prepared at home	**7%**	8%	7%	6%	4%	10%	9%
About THE SAME number of dinners being prepared at home	**55%**	57%	52%	78%	65%	54%	37%

Number of Shoppers: n=1,005	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
How many times a week do you/someone else in your household prepare your main evening meal at home (do not include takeout, ordering in or drive-thru)?							
7 times per week	**26%**	38%	22%	15%	26%	25%	21%
6 times per week	**21%**	17%	24%	23%	20%	21%	30%
5 times per week	**24%**	20%	25%	29%	25%	23%	19%
4 times per week	**11%**	8%	12%	14%	12%	10%	10%
3 times per week	**7%**	7%	7%	8%	7%	10%	3%
2 times per week	**4%**	4%	3%	7%	5%	5%	7%
1 time per week	**2%**	2%	2%	2%	2%	2%	1%
Less often than once a week	**2%**	1%	2%	2%	2%	1%	6%
Never	**3%**	4%	2%	2%	2%	4%	2%
Compared to a year ago, would you say your household now has…?							
MORE dinners being prepared at home	**38%**	42%	39%	37%	34%	41%	51%
FEWER dinners being prepared at home	**7%**	7%	7%	9%	8%	6%	9%
About THE SAME number of dinners being prepared at home	**55%**	51%	54%	54%	58%	53%	40%

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.43: MEAL PREPARATION ASSISTANCE

Q: Thinking about the food you are preparing at home, which of the following items would you be interested in your grocery store providing?

		Gender		Age cohort			
Number of Shoppers: n=1,005	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Easy to make recipes	**46%**	40%	52%	43%	42%	43%	54%
Recipes for cooking a meal under $10	**40%**	31%	48%	24%	31%	41%	53%
Paper recipes/recipe cards	**33%**	26%	39%	35%	34%	28%	36%
How-to meal preparation and recipe instructions for items on sale	**27%**	23%	30%	25%	23%	23%	34%
Convenient placement of items for an entire dinner solution such as pasta, sauce, meat, bread, salad	**24%**	25%	24%	11%	20%	22%	34%
Cooking instructions and demonstrations	**23%**	19%	26%	21%	18%	22%	29%
Online/electronic recipes	**21%**	20%	21%	12%	16%	22%	27%
Store personnel knowledgeable about food and less familiar products	**16%**	15%	17%	16%	13%	13%	22%
In-store dietitian or nutritionist	**12%**	10%	14%	4%	10%	10%	19%
How-to videos on their website	**12%**	13%	12%	6%	8%	12%	18%
In-store wine classes	**7%**	7%	8%	3%	3%	9%	12%
Online wine tips	**7%**	8%	6%	1%	4%	8%	11%
None of these	**25%**	29%	21%	33%	32%	27%	13%

		Total family income			Primary channel		
Number of Shoppers: n=1,005	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Easy to make recipes	**46%**	48%	46%	43%	46%	49%	34%
Recipes for cooking a meal under $10	**40%**	43%	40%	37%	39%	43%	44%
Paper recipes/recipe cards	**33%**	34%	34%	30%	35%	33%	19%
How-to meal preparation and recipe instructions for items on sale	**27%**	24%	29%	29%	28%	25%	33%
Convenient placement of items for an entire dinner solution such as pasta, sauce, meat, bread, salad	**24%**	23%	26%	23%	22%	26%	30%
Cooking instructions and demonstrations	**23%**	23%	21%	23%	22%	21%	37%
Online/electronic recipes	**21%**	21%	21%	19%	21%	18%	22%
Store personnel knowledgeable about food and less familiar products	**16%**	15%	18%	17%	16%	15%	18%
In-store dietitian or nutritionist	**12%**	14%	11%	17%	12%	10%	19%
How-to videos on their website	**12%**	11%	12%	14%	12%	10%	18%
In-store wine classes	**7%**	5%	6%	13%	8%	6%	13%
Online wine tips	**7%**	6%	6%	9%	6%	7%	12%
None of these	**25%**	26%	24%	27%	25%	26%	18%

TABLE A.44: CONSUMER COOKING SKILLS/KNOWLEDGE

Q: How would you rate your knowledge on: Top-2 Box (Very knowledgeable/I manage, but I'm no expert)

		Gender		Age cohort			
Number of Shoppers: n=1,005	**Total**	**Male**	**Female**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**
Preparing fresh produce	**88%**	85%	92%	93%	89%	88%	86%
Putting together a meal; picking meat/poultry and all the side items that match	**88%**	84%	91%	86%	88%	88%	88%
Cooking using crock pots/slow cookers	**81%**	76%	85%	77%	82%	80%	81%
Preparing all cuts and kinds of fresh meat and poultry	**78%**	78%	79%	90%	79%	81%	73%
Cooking healthful meals	**78%**	69%	85%	78%	77%	81%	76%
Cooking from scratch	**77%**	68%	84%	88%	77%	76%	74%
Baking cakes/desserts	**77%**	63%	88%	66%	76%	77%	80%
Grilling/BBQ	**72%**	81%	63%	72%	72%	73%	70%
Nutritional value of various foods	**70%**	65%	75%	70%	67%	75%	69%
Making marinades, sauces and gravy	**63%**	58%	67%	61%	67%	68%	55%
Preparing fresh seafood	**59%**	59%	58%	62%	65%	61%	49%
Picking/pairing wines	**29%**	33%	26%	36%	24%	33%	30%

		Total family income			Primary channel		
Number of Shoppers: n=1,005	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
Preparing fresh produce	**88%**	87%	90%	89%	90%	86%	80%
Putting together a meal; picking meat/poultry and all the side items that match	**88%**	87%	88%	86%	87%	86%	89%
Cooking using crock pots/slow cookers	**81%**	81%	80%	80%	80%	83%	75%
Preparing all cuts and kinds of fresh meat and poultry	**78%**	82%	80%	73%	77%	81%	71%
Cooking healthful meals	**78%**	73%	80%	79%	78%	73%	70%
Cooking from scratch	**77%**	78%	78%	71%	78%	69%	77%
Baking cakes/desserts	**77%**	81%	75%	70%	74%	79%	78%
Grilling/BBQ	**72%**	65%	72%	80%	70%	75%	87%
Nutritional value of various foods	**70%**	65%	74%	68%	70%	66%	73%
Making marinades, sauces and gravy	**63%**	66%	64%	54%	63%	62%	55%
Preparing fresh seafood	**59%**	55%	58%	63%	62%	52%	68%
Picking/pairing wines	**29%**	21%	30%	43%	34%	23%	33%

Note: Percentages may not add to 100% due to rounding

TABLE A.45: TRENDED CONCERN ABOUT NUTRITIONAL CONTENT OF FOOD

Q: How concerned are you about the nutritional content of the foods you eat?

	2016					2015
Number of Shoppers: n=1,056	Not at all concerned	Not too concerned	Somewhat concerned	Very concerned	Top-2 box Somewhat/ Very concerned	Top-2 box Somewhat/ Very concerned
All Shoppers	**3%**	**15%**	**48%**	**34%**	**82%**	**82%**
Gender						
Men	5%	17%	49%	29%	78%	74%
Women	2%	12%	47%	38%	85%	88%
Age cohort						
Millennials 18-37	4%	15%	51%	31%	82%	83%
Generation X 38-51	4%	15%	47%	34%	80%	78%
Boomers 52-70	3%	14%	46%	37%	83%	83%
Matures 71+	2%	16%	50%	32%	82%	89%
Household income						
Less than $25K	5%	20%	51%	24%	75%	79%
$25K - $34.9K	3%	16%	48%	33%	81%	87%
$35K - $49.9K	5%	18%	39%	38%	78%	82%
$50K - $74.9K	2%	11%	54%	32%	86%	82%
$75K - $99.9K	2%	18%	53%	27%	80%	82%
$100K - $124.9K	3%	10%	38%	48%	87%	80%
More than $125K	2%	7%	48%	44%	91%	85%
Household composition						
Children	5%	17%	45%	34%	78%	84%
No Children	3%	14%	49%	34%	83%	83%
Primary Store						
Full-service supermarket	3%	14%	49%	35%	84%	82%
Club store	2%	19%	35%	45%	80%	84%
Supercenter	5%	17%	46%	32%	78%	84%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.46: REASON FOR LEVELS OF CONCERN OVER NUTRITIONAL CONTENT

Q: You stated that you are NOT CONCERNED about the nutritional content of your food. Why is that?

Q: You stated that you are SOMEWHAT/VERY CONCERNED about the nutritional content of your food. Why is that?

		Gender		Age cohort			
Number of Shoppers: n=1,056	**Total**	**Male**	**Female**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**
"NOT CONCERNED" about the nutritional content of food (n=202)							
The foods I eat are nutritious enough to meet my needs	**58%**	58%	57%	58%	55%	56%	62%
"Nutritional content" is not very important to me	**33%**	36%	29%	23%	37%	30%	33%
I use dietary supplements to meet my nutritional needs	**21%**	19%	23%	15%	25%	18%	21%
Other reason	**3%**	4%	3%	8%	5%	4%	*
"SOMEWHAT/VERY CONCERNED" about the nutritional content of food (n=854)							
I'm concerned about my health in general	**61%**	64%	58%	60%	57%	65%	61%
Some of the food I eat has too much of something I need to avoid	**44%**	43%	44%	44%	45%	40%	45%
The foods I eat aren't nutritious enough in general	**22%**	26%	19%	17%	16%	20%	32%
I'm not getting enough of specific nutrients I need	**19%**	17%	20%	14%	17%	16%	25%
I have a specific health concern that affects my food choices	**18%**	20%	18%	23%	28%	15%	9%
Other reason	**6%**	7%	6%	4%	6%	7%	6%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
"NOT CONCERNED" about the nutritional content of food (n=202)							
The foods I eat are nutritious enough to meet my needs	**58%**	61%	53%	79%	55%	60%	45%
"Nutritional content" is not very important to me	**33%**	25%	36%	41%	40%	30%	38%
I use dietary supplements to meet my nutritional needs	**21%**	24%	22%	10%	20%	21%	23%
Other reason	**3%**	2%	4%	*	3%	3%	7%
"SOMEWHAT/VERY CONCERNED" about the nutritional content of food (n=854)							
I'm concerned about my health in general	**61%**	51%	63%	68%	65%	54%	57%
Some of the food I eat has too much of something I need to avoid	**44%**	41%	46%	40%	40%	45%	42%
The foods I eat aren't nutritious enough in general	**22%**	23%	22%	19%	22%	22%	18%
I'm not getting enough of specific nutrients I need	**19%**	21%	21%	12%	18%	21%	21%
I have a specific health concern that affects my food choices	**18%**	22%	18%	16%	18%	17%	17%
Other reason	**6%**	7%	5%	8%	6%	4%	9%

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.47: TRENDED PACKAGE HEALTH CLAIMS SHOPPERS LOOK FOR

Q: What health claims do you look for on the package when purchasing a food product? These are product attributes often prominently displayed on the front of the package (not the nutrition facts panel).

	Look for health claims on the package		
Number of Shoppers: n=1,056	2016	2015	1 yr % Change
Low sodium	42%	41%	0%
Whole grain	38%	41%	-7%
Low sugar	37%	38%	-3%
No trans fats	35%	36%	-4%
High fiber	35%	38%	-8%
No artificial ingredients	34%	37%	-8%
No preservatives	34%	35%	-4%
No/Low fat	26%	29%	-11%
Low calorie	25%	29%	-13%
Non-GMO	25%	26%	-5%
Natural	24%	26%	-7%
No HFCS (high-fructose corn syrup)	23%	28%	-17%
Low/Lowers cholesterol	21%	22%	-6%
Low carb	21%	20%	5%
Reduces risk of heart disease/heart healthy	16%	22%	-25%
Vitamin-enriched	15%	19%	-22%
Certified organic	14%	20%	-30%
Antioxidant-rich	13%	19%	-33%
Calcium-fortified	11%	14%	-23%
Gluten-free	7%	10%	-30%

TABLE A.48: PACKAGE HEALTH CLAIMS SHOPPERS LOOK FOR, BY GENDER AND AGE COHORT

Q: What health claims do you look for on the package when purchasing a food product? These are product attributes often prominently displayed on the front of the package (not the nutrition facts panel).

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Low sodium	**42%**	39%	44%	66%	45%	40%	32%
Whole grain	**38%**	32%	43%	35%	41%	37%	38%
Low sugar	**37%**	39%	35%	48%	43%	30%	32%
No trans fats	**35%**	31%	38%	46%	40%	35%	26%
High fiber	**35%**	28%	39%	39%	42%	32%	27%
No artificial ingredients	**34%**	28%	39%	36%	35%	34%	33%
No preservatives	**34%**	27%	38%	37%	37%	32%	30%
No/Low fat	**26%**	24%	27%	33%	26%	24%	24%
Low calorie	**25%**	21%	29%	37%	25%	21%	26%
Non-GMO	**25%**	20%	28%	18%	25%	25%	26%
Natural	**24%**	25%	24%	15%	22%	27%	27%
No HFCS (high-fructose corn syrup)	**23%**	20%	26%	33%	24%	23%	20%
Low/Lowers cholesterol	**21%**	24%	19%	26%	27%	16%	18%
Low carb	**21%**	17%	23%	28%	24%	15%	20%
Reduces risk of heart disease/heart healthy	**16%**	17%	16%	16%	21%	13%	13%
Vitamin-enriched	**15%**	14%	15%	13%	15%	13%	17%
Certified organic	**14%**	13%	15%	5%	10%	16%	19%
Antioxidant-rich	**13%**	11%	14%	17%	13%	12%	13%
Calcium-fortified	**11%**	8%	13%	19%	11%	8%	10%
Gluten-free	**7%**	6%	7%	4%	4%	7%	10%
Net totals by overall benefit							
Net-Avoid Negatives	66%	63%	69%	78%	72%	63%	61%
Net-Minimal processing	65%	59%	69%	68%	64%	64%	65%
Net-Good Fiber	51%	42%	57%	47%	56%	48%	47%
Net-Heart health	28%	32%	26%	32%	35%	22%	26%
Net-Positive nutrition	26%	23%	28%	36%	26%	22%	27%

TABLE A.49: PACKAGE HEALTH CLAIMS SHOPPERS LOOK FOR, BY INCOME AND PRIMARY STORE

Q: What health claims do you look for on the package when purchasing a food product? These are product attributes often prominently displayed on the front of the package (not the nutrition facts panel).

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Low sodium	**42%**	39%	41%	46%	46%	34%	37%
Whole grain	**38%**	33%	39%	45%	40%	33%	46%
Low sugar	**37%**	36%	37%	34%	38%	36%	42%
No trans fats	**35%**	32%	33%	39%	35%	34%	46%
High fiber	**35%**	31%	38%	36%	37%	34%	38%
No artificial ingredients	**34%**	32%	35%	32%	34%	32%	40%
No preservatives	**34%**	34%	31%	38%	35%	28%	39%
No/Low fat	**26%**	19%	27%	32%	26%	27%	34%
Low calorie	**25%**	21%	24%	31%	23%	28%	34%
Non-GMO	**25%**	26%	23%	27%	24%	24%	32%
Natural	**24%**	27%	24%	23%	24%	23%	29%
No HFCS (high-fructose corn syrup)	**23%**	21%	25%	22%	24%	19%	29%
Low/Lowers cholesterol	**21%**	19%	20%	24%	22%	19%	20%
Low carb	**21%**	19%	22%	19%	22%	21%	27%
Reduces risk of heart disease/heart healthy	**16%**	17%	15%	13%	17%	16%	20%
Vitamin-enriched	**15%**	19%	13%	11%	14%	17%	6%
Certified organic	**14%**	10%	15%	16%	13%	10%	22%
Antioxidant-rich	**13%**	13%	13%	12%	15%	10%	11%
Calcium-fortified	**11%**	12%	10%	10%	10%	11%	12%
Gluten-free	**7%**	6%	7%	4%	6%	7%	5%
Net totals by overall benefit							
Net-Avoid Negatives	**66%**	62%	68%	71%	69%	64%	80%
Net-Minimal processing	**65%**	63%	66%	66%	66%	58%	78%
Net-Good Fiber	**51%**	43%	54%	57%	54%	45%	57%
Net-Heart health	**28%**	28%	27%	30%	29%	28%	29%
Net-Positive nutrition	**26%**	29%	24%	26%	28%	24%	24%

TABLE A.50: TRENDED NUTRITIONAL LABELING

Q: Thinking of the variety of nutrition information sources in your primary food store, have you noticed...?

Number of Shoppers: n=1,056	2016	2015
Nutrition facts panel on products	92%	94%
Nutrition facts on the front of the product (Facts Up Front)	83%	81%
Shelf labeling programs (NuVal, Guiding Stars, etc.)	20%	12%
Links on a package to product-specific web page with consistent format for further details beyond basic nutrition and ingredients (SmartLabel, etc.)	16%	N/A

Note: Percentages may not add to 100 percent due to rounding

TABLE A.51: USE OF AND ATTITUDES ON STORE'S NUTRITIONAL LABELS

		Gender		Age cohort			
	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
How often do you use store's nutritional labeling guidance program to determine which particular product or item to purchase? n=1,007							
Always	**8%**	7%	8%	6%	6%	7%	10%
Frequently	**27%**	25%	28%	38%	27%	22%	27%
Occasionally	**31%**	31%	32%	36%	36%	31%	25%
Rarely	**20%**	24%	18%	15%	19%	24%	20%
Never	**14%**	14%	14%	5%	12%	16%	17%
For helping you make more healthful food choices, would you describe your store's nutritional label guidance program as…? n=666							
Extremely helpful	**12%**	12%	12%	6%	9%	12%	19%
Very helpful	**39%**	37%	41%	46%	45%	37%	31%
Somewhat helpful	**41%**	45%	38%	45%	38%	42%	41%
Slightly helpful	**7%**	6%	8%	2%	7%	8%	8%
Not at all helpful	**1%**	1%	1%	2%	1%	1%	1%

		Total family income			Primary channel		
	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
How often do you use store's nutritional labeling guidance program to determine which particular product or item to purchase? n=1,007							
Always	**8%**	6%	7%	5%	6%	8%	11%
Frequently	**27%**	22%	28%	32%	25%	26%	35%
Occasionally	**31%**	32%	30%	33%	34%	26%	36%
Rarely	**20%**	23%	20%	17%	23%	19%	8%
Never	**14%**	16%	14%	12%	12%	21%	10%
For helping you make more healthful food choices, would you describe your store's nutritional label guidance program as…? n=666							
Extremely helpful	**12%**	14%	11%	8%	10%	15%	14%
Very helpful	**39%**	37%	43%	36%	39%	36%	29%
Somewhat helpful	**41%**	41%	38%	49%	44%	39%	43%
Slightly helpful	**7%**	6%	8%	5%	6%	6%	13%
Not at all helpful	**1%**	3%	1%	1%	1%	4%	*

Note: Percentages may not add to 100 percent due to rounding.

* = Less than 0.5 percent of responses

TABLE A.52: TRENDED EVALUATION OF FOOD CONSUMPTION AT HOME

Q: Thinking of all the foods you eat at home, how would you describe your diet?

	2016					2015
Number of Shoppers: n=1,056	As healthy as it can be	Healthy enough	Could be somewhat healthier	Could be a lot healthier	Bottom-2 Box (Could be somewhat/ a lot healthier)	Bottom-2 Box (Could be somewhat/ a lot healthier)
All Shoppers	**4%**	**22%**	**54%**	**20%**	**74%**	**71%**
Gender						
Men	4%	24%	52%	19%	71%	70%
Women	4%	20%	55%	21%	76%	72%
Age cohort						
Millennials 18-37	3%	18%	51%	28%	79%	75%
Generation X 38-51	3%	21%	57%	19%	76%	72%
Boomers 52-70	6%	26%	50%	17%	67%	68%
Matures 71+	4%	22%	68%	6%	74%	64%
Household Income						
Less than $25K	3%	25%	45%	26%	72%	74%
$25K - $34.9K	8%	20%	57%	16%	73%	69%
$35K - $49.9K	3%	25%	56%	15%	72%	73%
$50K - $74.9K	4%	18%	54%	24%	77%	72%
$75K - $99.9K	4%	19%	60%	17%	77%	73%
$100K - $124.9K	2%	31%	42%	25%	67%	79%
More than $125K	2%	24%	66%	8%	74%	59%
Region						
East	5%	22%	55%	18%	73%	69%
Midwest	4%	27%	52%	17%	69%	72%
South	4%	20%	51%	25%	76%	73%
West	4%	20%	59%	17%	76%	67%
Household Composition						
Children	5%	20%	49%	27%	76%	71%
No Children	4%	23%	55%	18%	73%	71%

Note: Percentages may not add to 100 percent due to rounding

TABLE A.53: HEALTHFULNESS OF FOOD PREPARED AT HOME VS. AWAY FROM HOME

Q: Thinking about the food you prepare at home and the food you eat away from home, which of the following statements comes closest to how you feel about the food you eat?

	2016					2015
Number of Shoppers: n=1,056	The food I eat AWAY FROM HOME IS MUCH HEALTHIER	The food I eat AWAY FROM HOME IS SOMEWHAT HEALTHIER	The food I prepare AT HOME IS SOMEWHAT HEALTHIER	The food I prepare AT HOME IS MUCH HEALTHIER	Top-2 Box (At home is somewhat / much healthier)	Top-2 Box (At home is somewhat / much healthier)
All Shoppers	**3%**	**8%**	**47%**	**42%**	**89%**	**91%**
Gender						
Men	5%	7%	50%	38%	88%	89%
Women	2%	8%	44%	46%	90%	93%
Age cohort						
Millennials 18-37	6%	8%	50%	36%	86%	91%
Generation X 38-51	1%	6%	45%	47%	92%	90%
Boomers 52-70	3%	7%	45%	45%	90%	93%
Matures 71+	*	14%	47%	39%	86%	93%
Household Income						
Less than $25K	6%	9%	46%	38%	84%	92%
$25K - $34.9K	3%	7%	41%	49%	91%	95%
$35K - $49.9K	4%	9%	44%	43%	87%	86%
$50K - $74.9K	2%	9%	46%	43%	88%	91%
$75K - $99.9K	4%	7%	48%	40%	88%	88%
$100K - $124.9K	3%	3%	51%	44%	94%	93%
More than $125K	1%	2%	52%	46%	97%	93%
Region						
East	3%	9%	43%	45%	88%	89%
Midwest	2%	7%	43%	47%	91%	90%
South	5%	7%	47%	41%	87%	94%
West	2%	7%	54%	38%	91%	90%
Primary Store						
Full-service supermarket	2%	9%	47%	43%	90%	91%
Club store	9%	9%	46%	35%	81%	91%
Supercenter	2%	7%	50%	42%	91%	91%
Area						
Urban	3%	10%	44%	43%	87%	89%
Suburban	3%	8%	49%	40%	89%	91%
Rural	3%	5%	41%	51%	92%	92%
Small Town	3%	7%	50%	39%	89%	95%

Note: Percentages may not add to 100 percent due to rounding

* = Less than 0.5 percent of responses

TABLE A.54: RESPONSIBILITY FOR PROVIDING NUTRITIOUS FOOD

Q: Who do you feel should be primarily responsible for ensuring that the food you buy in your grocery store is NUTRITIOUS?

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Myself as an individual	**78%**	76%	80%	82%	80%	79%	75%
Manufacturers/Food processors	**36%**	33%	39%	43%	37%	34%	35%
Supermarkets/Food stores	**26%**	28%	24%	26%	22%	25%	31%
Governmental institutions or agencies	**25%**	27%	24%	20%	22%	27%	28%
Farmers	**15%**	16%	14%	10%	13%	18%	16%
Consumer groups/organizations	**13%**	12%	14%	11%	13%	14%	13%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Myself as an individual	**78%**	75%	78%	87%	80%	74%	83%
Manufacturers/Food processors	**36%**	37%	37%	31%	36%	37%	25%
Supermarkets/Food stores	**26%**	26%	27%	23%	27%	20%	23%
Governmental institutions or agencies	**25%**	22%	27%	24%	24%	25%	29%
Farmers	**15%**	15%	17%	9%	14%	14%	21%
Consumer groups/organizations	**13%**	11%	14%	12%	13%	9%	18%

TABLE A.55-A: WHO HELPS YOU STAY HEALTHY

Q: When it comes to helping you stay healthy, which of these people and institutions would you say tend to be on your side (helping you), and which tend to be working against you (making it more difficult to stay healthy)? (On Your Side).

		Gender		Age cohort			
Number of Shoppers: n=1,056	**Total**	**Male**	**Female**	**Matures 71+**	**Boomers 52-70**	**Gen X 38-51**	**Millennials 18-37**
My family	**72%**	69%	73%	74%	72%	74%	69%
Doctors	**67%**	65%	69%	77%	72%	66%	60%
My friends	**63%**	60%	65%	66%	61%	64%	62%
Farmers	**53%**	48%	56%	52%	56%	51%	52%
Fitness/health clubs	**49%**	46%	52%	52%	44%	49%	56%
My “primary” food store (where I buy the most)	**45%**	42%	47%	51%	50%	39%	44%
Drug stores	**31%**	28%	33%	46%	36%	31%	20%
Health insurance companies	**31%**	31%	31%	34%	36%	28%	27%
Food stores in general	**29%**	29%	29%	33%	31%	24%	28%
Local, independent restaurants where I live	**27%**	29%	25%	30%	26%	23%	31%
Government institutions or agencies	**17%**	21%	13%	15%	16%	17%	16%
Celebrity chefs	**16%**	17%	16%	11%	13%	18%	19%
The news media	**13%**	14%	13%	10%	15%	12%	13%
Manufacturers / Food processors	**13%**	13%	12%	12%	15%	11%	12%
The entertainment industry	**9%**	11%	7%	5%	8%	8%	12%
Fast food restaurants	**9%**	11%	7%	8%	10%	5%	11%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	**Total**	**Under $35K**	**$35K-$99,999**	**$100K or more**	**Super-market**	**Super-center**	**Club Store**
My family	**72%**	66%	72%	82%	74%	74%	70%
Doctors	**67%**	65%	66%	78%	71%	66%	56%
My friends	**63%**	61%	61%	68%	64%	65%	65%
Farmers	**53%**	55%	55%	48%	51%	60%	49%
Fitness/health clubs	**49%**	40%	50%	63%	51%	52%	66%
My “primary” food store (where I buy the most)	**45%**	49%	43%	45%	47%	43%	38%
Drug stores	**31%**	35%	29%	29%	31%	37%	29%
Health insurance companies	**31%**	31%	28%	41%	31%	34%	32%
Food stores in general	**29%**	32%	27%	26%	29%	31%	29%
Local, independent restaurants where I live	**27%**	29%	25%	27%	26%	28%	38%
Government institutions or agencies	**17%**	15%	16%	24%	15%	20%	16%
Celebrity chefs	**16%**	18%	15%	15%	16%	18%	22%
The news media	**13%**	16%	12%	12%	12%	17%	10%
Manufacturers / Food processors	**13%**	16%	10%	13%	11%	16%	16%
The entertainment industry	**9%**	10%	9%	7%	8%	12%	6%
Fast food restaurants	**9%**	12%	8%	6%	7%	10%	17%

TABLE A.55-B: WHO MAKES IT DIFFICULT TO STAY HEALTHY

Q: When it comes to helping you stay healthy, which of these people and institutions would you say tend to be on your side (helping you), and which tend to be working against you (making it more difficult to stay healthy)? (Net Working against you).

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Fast food restaurants	**53%**	49%	56%	49%	51%	53%	57%
Manufacturers / Food processors	**33%**	33%	34%	23%	30%	34%	40%
The entertainment industry	**31%**	30%	32%	28%	28%	28%	37%
Government institutions or agencies	**27%**	28%	27%	33%	30%	21%	28%
Health insurance companies	**24%**	28%	21%	22%	24%	22%	28%
The news media	**23%**	24%	22%	28%	21%	17%	29%
Local, independent restaurants where I live	**15%**	16%	14%	7%	14%	16%	17%
Celebrity chefs	**13%**	14%	12%	17%	17%	10%	12%
Drug stores	**12%**	15%	9%	6%	10%	12%	15%
Food stores in general	**11%**	10%	12%	1%	9%	10%	17%
My friends	**5%**	6%	4%	3%	4%	3%	9%
Fitness/health clubs	**5%**	7%	3%	3%	6%	5%	4%
Doctors	**5%**	5%	4%	0%	4%	5%	6%
My family	**5%**	6%	3%	1%	3%	6%	7%
My "primary" food store (where I buy the most)	**5%**	6%	3%	1%	2%	5%	8%
Farmers	**4%**	5%	3%	4%	2%	4%	6%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Fast food restaurants	**53%**	44%	55%	62%	55%	52%	53%
Manufacturers / Food processors	**33%**	29%	35%	39%	34%	32%	45%
The entertainment industry	**31%**	27%	34%	33%	32%	31%	38%
Government institutions or agencies	**27%**	30%	29%	19%	27%	31%	22%
Health insurance companies	**24%**	24%	27%	19%	22%	27%	25%
The news media	**23%**	19%	26%	22%	23%	23%	20%
Local, independent restaurants where I live	**15%**	12%	18%	13%	15%	14%	21%
Celebrity chefs	**13%**	14%	13%	11%	13%	11%	10%
Drug stores	**12%**	11%	12%	9%	10%	12%	19%
Food stores in general	**11%**	10%	11%	13%	9%	10%	11%
My friends	**5%**	5%	5%	4%	5%	3%	14%
Fitness/health clubs	**5%**	5%	5%	5%	5%	3%	13%
Doctors	**5%**	7%	4%	2%	4%	6%	2%
My family	**5%**	4%	4%	7%	5%	3%	12%
My "primary" food store (where I buy the most)	**5%**	4%	5%	5%	3%	5%	8%
Farmers	**4%**	2%	6%	3%	4%	2%	8%

TABLE A.56: HEALTH CONDITIONS BEING MANAGED

Q: Which, if any, of these health conditions are currently present in your household?

		Gender		Age cohort			
Number of Shoppers: n=2,061	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Anxiety or stress	**27%**	22%	30%	11%	19%	31%	35%
Obesity	**19%**	16%	21%	18%	20%	21%	17%
Digestive disorder or frequent heartburn	**17%**	13%	20%	22%	18%	16%	15%
Frequent insomnia or sleep disorder	**16%**	14%	18%	13%	17%	16%	16%
Diabetes	**16%**	19%	13%	22%	22%	14%	8%
Food allergy/sensitivity	**13%**	11%	13%	9%	9%	13%	17%
Pre-diabetes	**5%**	3%	6%	10%	5%	5%	4%
None of the above	**44%**	47%	42%	46%	46%	42%	45%

		Total family income			Primary channel		
Number of Shoppers: n=2,061	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Anxiety or stress	**27%**	31%	26%	23%	26%	29%	27%
Obesity	**19%**	20%	19%	19%	18%	23%	17%
Digestive disorder or frequent heartburn	**17%**	16%	17%	17%	18%	15%	22%
Frequent insomnia or sleep disorder	**16%**	19%	15%	14%	15%	17%	13%
Diabetes	**16%**	17%	16%	13%	15%	19%	20%
Food allergy/sensitivity	**13%**	12%	12%	14%	11%	14%	19%
Pre-diabetes	**5%**	5%	6%	5%	5%	7%	3%
None of the above	**44%**	39%	45%	49%	46%	38%	41%

Note: Percentages may not add to 100 percent due to rounding.

TABLE A.57: PARTIES RELIED ON MOST BY SHOPPERS TO ENSURE FOOD PURCHASED IS SAFE

Q: As far as you are personally concerned, who do you rely on the most to ensure that the products you buy in your grocery store are SAFE?

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
Myself as an individual	**61%**	63%	59%	64%	64%	54%	61%
Food and Drug Administration (FDA)	**54%**	53%	55%	39%	50%	60%	58%
United States Department of Agriculture (USDA)	**50%**	53%	48%	36%	47%	57%	52%
Manufacturers/Food processors	**42%**	39%	44%	44%	44%	44%	37%
Food stores	**40%**	38%	42%	39%	41%	42%	38%
Other Governmental institutions or agencies (other than USDA or FDA)	**22%**	23%	21%	12%	19%	23%	27%
Farmers	**21%**	20%	22%	15%	20%	24%	21%
Consumer groups/organizations	**16%**	18%	14%	19%	15%	15%	16%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
Myself as an individual	**61%**	62%	61%	64%	60%	61%	69%
Food and Drug Administration (FDA)	**54%**	53%	52%	60%	55%	53%	54%
United States Department of Agriculture (USDA)	**50%**	47%	50%	59%	53%	48%	36%
Manufacturers/Food processors	**42%**	38%	43%	44%	43%	42%	45%
Food stores	**40%**	35%	42%	45%	42%	37%	30%
Other Governmental institutions or agencies (other than USDA or FDA)	**22%**	22%	18%	28%	23%	20%	23%
Farmers	**21%**	20%	20%	24%	22%	20%	23%
Consumer groups/organizations	**16%**	13%	14%	21%	15%	15%	21%

TABLE A.58: TRUST IN GROCERY STORE TO ENSURE FOOD SAFETY

Q: Do you disagree or agree with the following statements? I trust my grocery store to ensure that the food I purchase is safe.

	2016					2015	
Number of Shoppers: n=1,056	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree	Top-2 Box Somewhat / strongly agree	Top-2 Box Somewhat / strongly agree	1 yr % Change
All Shoppers	**1%**	**4%**	**46%**	**48%**	**94%**	**93%**	**1%**
Gender							
Men	2%	3%	47%	47%	94%	94%	0%
Women	1%	5%	46%	48%	94%	92%	2%
Age cohort							
Millennials 18-37	1%	6%	51%	41%	91%	91%	0%
Gen X 38-51	1%	4%	44%	51%	94%	92%	2%
Boomers 52-70	1%	4%	45%	50%	95%	93%	2%
Mature 71+	1%	2%	43%	54%	97%	97%	0%
Household Income							
Less than $25K	1%	3%	52%	43%	94%	89%	6%
$25K - $34.9K	1%	3%	42%	54%	96%	93%	3%
$35K - $49.9K	1%	6%	41%	50%	91%	96%	-5%
$50K - $74.9K	1%	3%	52%	44%	95%	91%	4%
$75K - $99.9K	2%	5%	46%	48%	94%	94%	-1%
$100K - $124.9K	1%	1%	40%	57%	97%	96%	1%
More than $125K	1%	3%	46%	49%	95%	94%	2%
Region							
East	1%	4%	47%	45%	93%	97%	-4%
Midwest	2%	3%	39%	55%	95%	94%	1%
South	1%	5%	44%	48%	92%	92%	0%
West	1%	3%	54%	43%	97%	91%	6%
Household Composition							
Single person household	1%	3%	52%	43%	94%	85%	11%
Household with children under 18 yrs old	1%	5%	43%	49%	92%	83%	12%
Household without children under 18 yrs old	1%	4%	47%	47%	94%	84%	13%
Primary Store							
Full-service supermarket	1%	3%	44%	51%	96%	95%	1%
Club store	6%	2%	50%	43%	92%	91%	1%
Supercenter	1%	7%	43%	48%	91%	91%	1%

Note: Percentages may not add to 100% due to rounding

TABLE A.59: TRENDED CONFIDENCE IN FOOD SAFETY AT THE GROCERY STORE

Q: How confident are you that the food in your grocery store is SAFE? Would you say you are…?

	2016					2015
Number of Shoppers: n=1,056	Very doubtful	Somewhat doubtful	Mostly confident	Completely confident	Top-2 Box Mostly/ completely confident	Top-2 Box Mostly/ completely confident
All Shoppers	**2%**	**12%**	**69%**	**17%**	**86%**	**84%**
Gender						
Men	3%	9%	67%	21%	88%	86%
Women	2%	13%	71%	14%	85%	83%
Age cohort						
Millennials 18-37	5%	15%	61%	19%	80%	84%
Gen X 38-51	1%	7%	75%	17%	92%	86%
Boomers 52-70	1%	12%	70%	16%	87%	80%
Mature 71+	*	13%	73%	14%	87%	89%
Household Income						
Less than $25K	2%	16%	67%	15%	82%	81%
$25K - $34.9K	*	11%	73%	16%	89%	80%
$35K - $49.9K	5%	12%	61%	22%	83%	83%
$50K - $74.9K	2%	14%	70%	14%	84%	83%
$75K - $99.9K	4%	8%	73%	15%	88%	88%
$100K - $124.9K	*	6%	73%	20%	94%	83%
More than $125K	1%	4%	76%	19%	95%	90%
Region						
East	2%	12%	66%	21%	87%	82%
Midwest	1%	6%	74%	19%	93%	84%
South	4%	17%	64%	15%	79%	85%
West	*	8%	75%	16%	92%	83%
Household Composition						
Single person household	2%	9%	73%	16%	89%	85%
Household with children under 18 yrs old	4%	15%	67%	14%	81%	83%
Household without children under 18 yrs old	1%	11%	70%	18%	88%	84%
Primary Store						
Full-service supermarket	1%	10%	71%	18%	89%	89%
Club store	4%	14%	70%	11%	81%	83%
Supercenter	2%	14%	65%	18%	84%	80%

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.60: TRENDED CONFIDENCE IN FOOD SAFETY AT RESTAURANTS

Q: How confident are you that restaurant food is SAFE? Would you say you are…?

	2016					2015
Number of Shoppers: n=1,056	Very doubtful	Somewhat doubtful	Mostly confident	Completely confident	Top-2 Box Mostly/ completely confident	Top-2 Box Mostly/ completely confident
All Shoppers	**4%**	**24%**	**65%**	**7%**	**72%**	**72%**
Gender						
Men	2%	20%	69%	10%	78%	76%
Women	5%	28%	62%	5%	67%	69%
Age cohort						
Millennials 18-37	4%	26%	62%	9%	70%	68%
Gen X 38-51	2%	21%	71%	6%	77%	75%
Boomers 52-70	6%	25%	63%	6%	69%	72%
Mature 71+	2%	26%	67%	5%	72%	75%
Region						
East	1%	27%	65%	7%	72%	69%
Midwest	3%	19%	71%	6%	78%	71%
South	6%	30%	58%	6%	64%	71%
West	2%	20%	70%	8%	78%	75%
Primary Store						
Full-service supermarket	3%	23%	68%	6%	74%	77%
Club store	2%	23%	75%	*	75%	73%
Supercenter	4%	27%	60%	9%	69%	66%
Household Income						
Less than $25K	4%	29%	63%	4%	67%	59%
$25K - $34.9K	8%	28%	57%	6%	64%	69%
$35K - $49.9K	4%	23%	64%	8%	72%	72%
$50K - $74.9K	4%	23%	66%	7%	72%	75%
$75K - $99.9K	2%	21%	70%	7%	77%	79%
$100K - $124.9K	1%	18%	74%	7%	81%	75%
More than $125K	2%	15%	72%	11%	83%	86%
Area						
Urban	4%	24%	62%	10%	72%	70%
Suburban	2%	21%	72%	5%	77%	78%
Rural	5%	31%	55%	9%	64%	65%
Small Town	7%	27%	61%	5%	66%	63%

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.61: FOOD SAFETY PROBLEMS

Q: Where do you think food-safety problems are most likely to occur?

		Gender		Age cohort			
Number of Shoppers: n=1,056	Total	Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
At food processing/manufacturing plants	**56%**	55%	56%	63%	58%	57%	50%
While stored in a warehouse awaiting distribution	**9%**	7%	10%	7%	9%	6%	11%
In restaurants	**7%**	8%	7%	7%	6%	10%	6%
At home	**6%**	8%	5%	4%	5%	6%	8%
On the farm	**5%**	5%	5%	3%	5%	4%	5%
During transportation	**4%**	4%	4%	2%	4%	4%	5%
In grocery stores	**3%**	3%	3%	*	4%	2%	4%
Not sure	**11%**	10%	11%	15%	9%	11%	11%

		Total family income			Primary channel		
Number of Shoppers: n=1,056	Total	Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
At food processing/manufacturing plants	**56%**	53%	57%	58%	58%	52%	53%
While stored in a warehouse awaiting distribution	**9%**	9%	9%	6%	9%	13%	1%
In restaurants	**7%**	6%	9%	6%	6%	8%	14%
At home	**6%**	6%	6%	7%	5%	5%	7%
On the farm	**5%**	5%	4%	7%	5%	4%	7%
During transportation	**4%**	5%	3%	5%	4%	5%	3%
In grocery stores	**3%**	3%	3%	4%	3%	3%	9%
Not sure	**11%**	12%	10%	7%	9%	10%	5%

Note: Percentages may not add to 100% due to rounding

* = Less than 0.5 percent of responses

TABLE A.62: TRENDED FOOD RELATED HEALTH RISKS

Q: How much of a health risk do you believe each of the following food-related items present?

	2016					2015
Number of Shoppers: n=1,056	Not sure	No health risk at all	A slight health risk	Some health risk	A serious health risk	A serious health risk
Contamination by bacteria or germs	4%	2%	14%	21%	58%	48%
Product tampering	5%	5%	17%	19%	54%	39%
Terrorists tampering with the food supply	8%	7%	17%	15%	53%	40%
Residues, such as pesticides and herbicides	5%	3%	18%	25%	48%	41%
Antibiotics and hormones used on poultry or livestock	8%	6%	22%	32%	32%	28%
Food from China	13%	6%	20%	29%	32%	30%
Foods produced by biotechnology or genetically modified organisms	12%	13%	21%	26%	28%	23%
Irradiated foods	24%	11%	17%	22%	26%	20%
Eating food past the "use by" date	4%	14%	38%	30%	15%	12%
Food handling in supermarkets	6%	8%	40%	32%	15%	12%
Eating food past the "sell by" date	4%	21%	39%	23%	13%	10%
Eating food past the "best by" date	4%	21%	40%	22%	13%	9%

Note: Percentages may not add to 100% due to rounding

TABLE A.63: PRODUCT EXPIRATION LABELING

	Not at all likely	Somewhat likely	Very likely
Imagine that on May 8, 2016 you saw the phrase, 'USE BY May 5, 2016' stamped on a food product you were considering purchasing. That is, the product was three days past it's 'USE BY' date. How likely is it that this product would be...? n=708			
A good choice if it were sold at a discount	42%	40%	18%
Less safe than it was before	25%	48%	27%
Lower quality than it was before	22%	47%	31%
Imagine that on May 18, 2016 you saw the phrase, 'SELL BY May 15, 2016' stamped on a food product you were considering purchasing. That is, the product was three days past it's 'SELL BY' date. How likely is it that this product would be...? n=703			
A good choice if it were sold at a discount	38%	43%	19%
Less safe than it was before	31%	45%	24%
Lower quality than it was before	25%	48%	26%
Imagine that on May 28, 2016 you saw the phrase, 'BEST BY May 25, 2016' stamped on a food product you were considering purchasing. That is, the product was three days past it's 'BEST BY' date. How likely is it that this product would be...? n=701			
A good choice if it were sold at a discount	34%	44%	22%
Less safe than it was before	29%	46%	25%
Lower quality than it was before	23%	48%	29%

Note: Percentages may not add to 100% due to rounding

TABLE A.64: COMMUNICATION FOR FOOD SAFETY RECALLS BY GENDER AND COHORT

Number of Shoppers: n=1,056	Total	Gender		Age cohort			
		Male	Female	Matures 71+	Boomers 52-70	Gen X 38-51	Millennials 18-37
From which of the following sources do you typically hear about food product recalls?							
Television	**74%**	72%	76%	82%	82%	75%	62%
Newspapers or magazines	**26%**	27%	26%	37%	31%	23%	20%
Radio	**23%**	27%	20%	18%	23%	23%	23%
Friends or family members	**22%**	16%	26%	16%	18%	18%	31%
Visits to my supermarket	**12%**	11%	12%	7%	10%	13%	14%
Government websites (i.e., USDA, FDA, etc.)	**11%**	11%	11%	8%	8%	14%	12%
Food manufacturer websites/Facebook page	**9%**	8%	10%	1%	5%	9%	16%
Email alerts from manufacturers	**7%**	5%	8%	4%	7%	5%	9%
My supermarket alerts me through my membership in its loyalty program	**7%**	6%	7%	3%	5%	6%	10%
Email alerts from grocery store	**6%**	4%	8%	5%	7%	7%	6%
My supermarket's website/Facebook page	**6%**	4%	7%	1%	4%	5%	8%
Email alerts from government agencies	**5%**	6%	5%	5%	7%	6%	4%
Other	**5%**	5%	5%	2%	4%	6%	8%
I don't look for information about food product recalls	**6%**	7%	5%	6%	4%	7%	6%
Imagine that in addition to (notices near the shelf where the unsafe product was sold), you could sign up for food safety recall alerts from your supermarket about food recalls that affect the products you specifically may have purchased recently. If you had a your choice, how would you prefer to receive these food safety recall alerts?							
Email	**56%**	53%	59%	63%	60%	58%	49%
Post notices where the product is sold in the store	**39%**	40%	37%	51%	41%	35%	35%
Text messages	**26%**	25%	27%	10%	23%	32%	28%
Post notices in the store at the checkout register	**25%**	26%	24%	31%	22%	23%	28%
Social media updates/postings	**18%**	16%	20%	12%	10%	16%	32%
US Mail	**14%**	14%	14%	18%	13%	11%	18%
Notification in store's smartphone app	**11%**	12%	10%	2%	8%	11%	17%
Phone calls	**7%**	5%	7%	8%	6%	6%	7%
NONE – I wouldn't want my supermarket to notify me specifically about this	**9%**	12%	7%	9%	9%	8%	10%

TABLE A.65: COMMUNICATION FOR FOOD SAFETY RECALLS BY INCOME AND PRIMARY CHANNEL

Number of Shoppers: n=1,056	Total	Total family income			Primary channel		
		Under $35K	$35K-$99,999	$100K or more	Super-market	Super-center	Club Store
From which of the following sources do you typically hear about food product recalls?							
Television	**74%**	73%	75%	72%	76%	75%	68%
Newspapers or magazines	**26%**	21%	28%	30%	29%	21%	29%
Radio	**23%**	19%	23%	27%	24%	20%	15%
Friends or family members	**22%**	21%	22%	22%	21%	23%	24%
Visits to my supermarket	**12%**	11%	14%	8%	12%	9%	6%
Government websites (i.e., USDA, FDA, etc.)	**11%**	11%	10%	10%	11%	7%	10%
Food manufacturer websites/Facebook page	**9%**	9%	10%	7%	9%	11%	8%
Email alerts from manufacturers	**7%**	8%	7%	6%	7%	8%	9%
My supermarket alerts me through my membership in its loyalty program	**7%**	4%	8%	8%	7%	5%	12%
Email alerts from grocery store	**6%**	9%	6%	5%	6%	6%	1%
My supermarket's website/Facebook page	**6%**	6%	6%	4%	6%	5%	9%
Email alerts from government agencies	**5%**	6%	5%	7%	5%	5%	4%
Other	**5%**	5%	5%	4%	5%	5%	2%
I don't look for information about food product recalls	**6%**	7%	6%	5%	4%	7%	10%
Imagine that in addition to (notices near the shelf where the unsafe product was sold), you could sign up for food safety recall alerts from your supermarket about food recalls that affect the products you specifically may have purchased recently. If you had a your choice, how would you prefer to receive these food safety recall alerts?							
Email	**56%**	54%	58%	58%	57%	59%	47%
Post notices where the product is sold in the store	**39%**	42%	37%	37%	38%	40%	28%
Text messages	**26%**	23%	26%	30%	29%	23%	33%
Post notices in the store at the checkout register	**25%**	23%	27%	21%	26%	24%	22%
Social media updates/postings	**18%**	23%	17%	13%	18%	22%	17%
US Mail	**14%**	19%	13%	9%	15%	13%	10%
Notification in store's smartphone app	**11%**	11%	10%	13%	12%	13%	6%
Phone calls	**7%**	8%	6%	5%	7%	8%	2%
NONE – I wouldn't want my supermarket to notify me specifically about this	**9%**	12%	9%	5%	8%	12%	6%

Methodology

The 2016 FMI U.S. Grocery Shopping Trends Study supplemented FMI's year-over-year survey research perspective with a cultural lens, interviewing Americans in their homes and while shopping, and drawing upon an accumulation of ethnographic research into U.S. food consumption and consumers.

This year, in addition to gaining a better understanding of how individual food shoppers make the decisions they do, additional research topics were added to provide a better understanding of the dynamics of multi-shopper households. Added topics explored how shoppers manage the division of labor and food shopping within their households, uncovering frustrations and opportunities in how shoppers plan, decide, shop and cook for their households.

QUALITATIVE RESEARCH

Ethnography consisted of two main research components:

- In-depth, one-on-one interviews with 10 consumers from 5 two-shopper households in the Seattle area February 29th and March 1, 2016. These 3-hour interviews included home tours of kitchens, eating and food-storage areas as well as shop-along interviews in frequented food retail locations. Photographs were taken wherever possible to capture evidence of modern food cultural artifacts and shopping behavior.
- 2013-2015 Hartman Group ethnographic and research into eating and shopping.

QUANTITATIVE RESEARCH

Quantitative surveying consisted of a 25-minute online questionnaire, with sample obtained via Harris Online research panel. The survey was fielded between February 2, 2016 and February 12, 2016 to a nationally representative sample of n=2,061 U.S. primary shoppers ages 18 years and older. The sample was split to cover a wider range of topics, with each sub-sample having n>1,000.

According to the conventions of probability sampling, the complete sample of n=2,265 enables estimates with a sampling error of no more than ±2.1% at the 95% confidence level, with split-sample topics yielding a margin of error of ±3.0%.

The respondents surveyed had to meet the following criteria to qualify for the survey: U.S. residency, age 18 years or older, having at least 50% responsibility for food shopping, and shopping for groceries within the past two weeks. Post-stratification weights were applied to the incoming, pre-screened sample to match U.S. Census December 2015 estimates for age-nested-in gender, race, Hispanic origin, income, and geographic Division.

Additional analysis was conducted of previous FMI survey data, U.S. Census, Bureau of Labor Statistics and USDA data sets on consumer spending, health and eating, Hartman Group's 2012-2016 syndicated reports on eating and shopping.