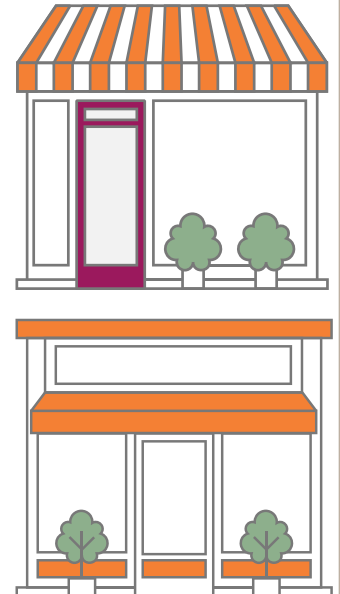
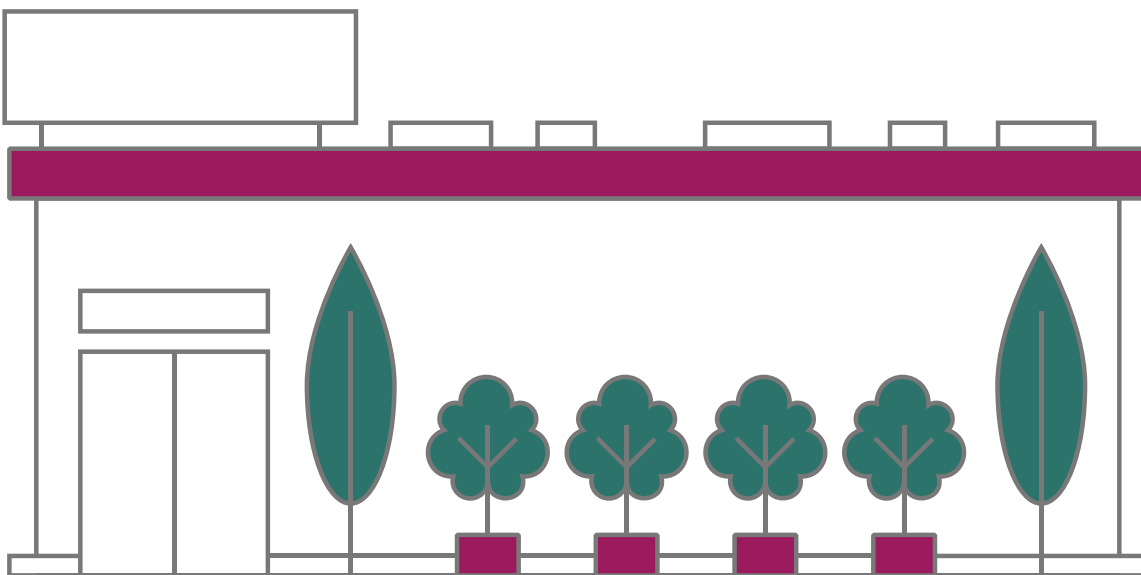
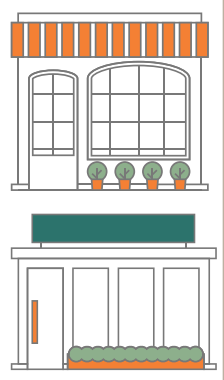
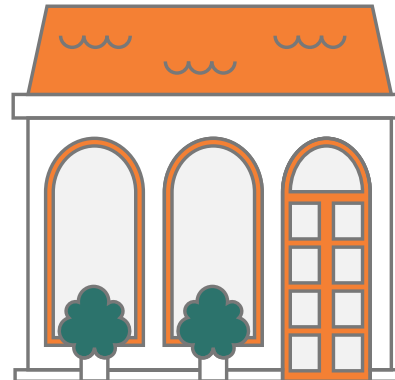
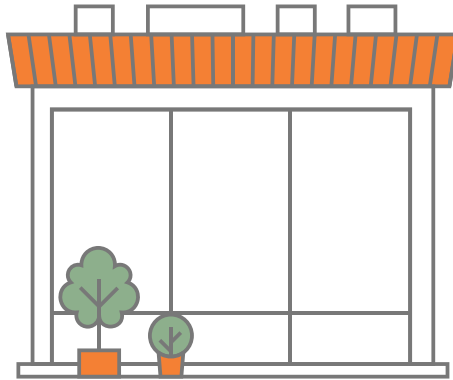
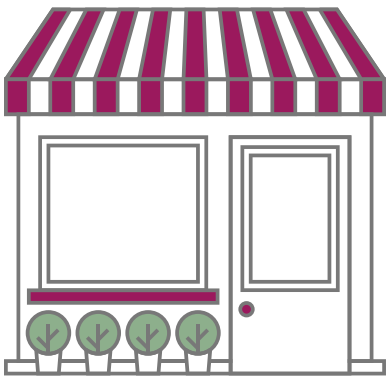


2015 NATIONAL GROCERS ASSOCIATION SUPERMARKETGURU® CONSUMER SURVEY REPORT



PRESENTED BY:



PHIL LEMPERT
SUPERMARKET
GURU®

EXECUTIVE SUMMARY



Consumers in 2015 want supermarkets with services that delight beyond the basics. The more, the better. These retail talents bond shoppers to stores – in an era where seemingly everyone sells food, and smaller formats especially can steal Quick Trips.

Price still matters in 2015 as well. Shoppers could use a break from relentless budget pressures brought on by an economic recovery that – despite glowing headlines - has yet to reach millions of people with stagnant wages, and includes higher housing, food and health care costs.

For example, this 2015 National Grocers Association-SupermarketGuru Consumer Survey Report reveals a bounce of nearly 10 percentage points for deals. Six in 10 consumers (59.8%) now call them “very” important. People love the rush of finding a hot buy. This measure was 50.4% in 2014 and 49.1% in 2013; the jump to the current measure practically equals the 2010 recession peak of 60.0%. Maximize the impact of trade promotions, and message consumers early and often on their paths to purchase, to earn the most credit for being price-friendly.

This year, 41.4% of consumers grade supermarkets “excellent” on this measure, a near four-point advance that reflects better planning and execution of trade events in 2015, with the help of technology-enabled, data-driven CPG suppliers. Best Practices in establishing deals, targeting audiences and communicating these ways to save are more polished – and consumers see the difference.

Our 2015 survey once again explores the full breadth of consumer response to dozens of key store traits beyond price, as people select and assess their primary supermarkets. Their preferred stores typically score high on the most important classic measures – among them fresh foods and staff courtesies to help keep the hometown edge and truly differentiate independent supermarkets from competitors:

- Nearly half of consumers (47.9%) rate their favorite food store “excellent” in high-quality fruits and vegetables. This continues to rise – from just 43.5% two years ago. A vital trend since perimeter fresh foods are magnets to three-quarters of adult shoppers (74.1%), and two-thirds (67.5%) call produce their #1 attraction.
- More than half of consumers (52.4%) rate their preferred supermarket “excellent” on courteous, friendly employees. This is up nearly four points from last year. Another pivotal measure since shoppers feel better spending money in stores where workers are nice to them. A commanding 96.4% say this is “very/somewhat” important to their choice of a primary supermarket; 62.9% say “very.”

Supermarkets must also keep current on new influences affecting store choice. Some of these newer factors include: Data security to prevent breaches and lost privacy; online orders, with both pick-up and delivery options; and environmental accountability.

These three are among new topics addressed in this survey, as we expand the benchmarking questionnaire once more. Findings show how quickly and decisively operators must move to stay on the right side of developing issues, so as not to undermine their hard-earned status with shoppers in their trading areas.

EXECUTIVE SUMMARY



For instance, data breaches became front-page news when high-profile merchants – and their credit and debit card customers – fell victim to hacker encroachment. Fortunately for supermarkets that might suffer a first incident, consumers would be forgiving: just 4.7% say they’d “definitely” switch stores, one in 10 would “probably” switch stores, and six in 10 (58.8%) say it “depends on the circumstance – a retailer deserves more than one chance.” For the remaining quarter of consumers, a first breach would barely cause a blip: 16.9% would “probably still shop there” and 8.4% would definitely still shop there.

However, more shoppers would be in play and open to switch stores upon a second incident: 15.6% would “definitely” shop elsewhere, and 27.9% would “probably seek another store.” The proportion of consumers that still feel it “depends on the circumstances” would drop to just 37.0%. For the rest, 7.5% would “probably” still shop at the same store, another 14.5% “would shop there, but pay cash,” and only 3.0% would definitely stay on as a customer.

About one-third of shoppers say they are open to food delivery today. The industry is betting this figure will rise. Where should retailers invest? This survey says to gear up for three to five deliveries per month at most to these customers. And execute to give them what they want most: “food arrives in excellent condition” (66.7%), “free or low-cost delivery” (66.0%); “ability to schedule a delivery time, within a narrow window” (49.3%), “same food prices as in-store” (48.6%), and “temperature control of perishables” (40.3%). The Uber aspect of “security – I’m told who will deliver it” matters to fewer than one in 10 (8.3%). The payment structure consumers prefer is to pay a fee for each delivery (49.3%), which tops “pick up food at store for a lower fee or free” (31.3%) and “food is delivered unlimited times for a periodic monthly or annual fee” (19.4%).

Meanwhile, the biggest takeaway for supermarkets excelling in environmental practices is to make sure consumers know – because just one-third of survey respondents (34.6%) say they’re aware if their favorite stores are good eco-citizens.

METHODOLOGY



On behalf of the National Grocers Association, SupermarketGuru.com conducted a national consumer panel online between October and November 2014. In all, 902 chief household shoppers completed surveys that detailed their experiences, behaviors and sentiments on what appeals to them (or not) about supermarkets, as well as their purchase influences, eating habits and nutritional concerns. A total of 129 shopping attributes are addressed in this year's survey.

The SupermarketGuru.com Consumer Panel is an opt-in, food-involved population of more than 105,000 shoppers that are pre-registered with the site and submitted their confidential demographic information. Respondents were 73.9% female.

Survey development and design:
Consumer Insight, Inc.: Phil Lempert

Survey review, analysis and composition:
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Report may be purchased at www.nationalgrocers.org
\$75 Members/Associate Members
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1: PRIMARY FOOD STORE



WHERE DO YOU PURCHASE THE MAJORITY OF YOUR FOODS?

A leap of 2.5 percentage points for supermarkets to 86.4% from last year's 83.9% is great news for the channel. This finding suggests that supermarkets are satisfying better-informed shoppers and competing well against many kinds of aggressive competitors. Indeed, as 2015 begins it looks as if supermarkets have learned to stem long-term erosion and win share back from would-be suitors.

For instance, warehouse club share slid to 2.7% from 3.4% last year, mass merchants held steady at 3.4%, specialty food store share fell to 2.6% from 3.2% a year ago, and farmers' markets dipped to a 0.4% share from 1.6% in 2014. As recently as 2011, mass posted a 7.0% level.

Supermarket support was consistent within the 88%-90% range across all income tiers earning \$45,000 and above annually. Households of three persons (90.8%) and two (86.7%) said they buy in supermarkets the most, as did young Millennials under age 25 (93.8%), and older consumers (age 50-64, 87.4%, and age 65+, 88.7%).

Grocery Store/ Supermarket	86.4%
Mass Merchandiser	3.4%
Warehouse Store	2.7%
Specialty Food Store	2.6%
Discount Store	1.6%
Other	1.1%
Gourmet Store	0.8%
Convenience Store	0.6%
Farmers' Market	0.4%
Online Retailer (e.g.: Amazon, Supermarket Website)	0.4%
Dollar Store	0.1%
Drug Store	0.0%

1: PRIMARY FOOD STORE



DO YOU HAVE A PRIMARY SUPERMARKET?

Nearly nine out of ten consumers (88.6%) say they have a primary supermarket for food shopping. Men, who play increasing roles in the home kitchen these days, feel this strongly (91.4%), as do larger households of four (93.9%) or more (93.8%), young Millennials under age 25 (100%) and seniors 65+ (91.2%).

Yes	88.6%
No	11.4%

IF YES, WHY?

Six out of 10 consumers (59.9%) say overall satisfaction is their top reason, followed by convenience (46.2%). About one-third then cite food quality (35.1%), trailed by price (33.6%), in a question where they could cite multiple responses.

By ethnicity, Hispanics (75.0%) are the most satisfied overall. Yet Asians lead in naming convenience (64.7%) and price (58.8%), while Caucasians cite "best food quality" the most (36.0%). Also the most satisfied overall are the highest-income households of \$165,001+ annually (62.8%) and the heaviest grocery spenders of \$81-\$100 per week (62.8%) and \$101+ per week (62.3%).

It satisfies me the most overall of nearby alternatives	59.9%
It is the most convenient	46.2%
It has the best food quality	35.1%
It has the best prices	33.6%
It offers personal services	12.2%

IF NO, WHY NOT?

The restlessness of other consumers stands out in response to this question, another that allowed multiple responses. More than seven in 10 simply say, "no particular store stands out" to them (71.7%), while more than one-third (34.3%) say they "usually buy food in other types of stores."

No particular store stands out to me	71.7%
I usually buy food in other types of stores	34.3%
I live in a food desert	2.0%
I usually eat out	1.0%

2: IMPORTANCE OF SUPERMARKET FEATURES



PLEASE READ THIS LIST OF FACTORS THAT MAY OR MAY NOT BE IMPORTANT WHEN A PERSON DECIDES WHERE TO SHOP FOR GROCERIES. FOR EACH FACTOR, PLEASE TELL ME WHETHER IT IS VERY IMPORTANT, SOMEWHAT IMPORTANT, NOT TOO IMPORTANT OR NOT AT ALL IMPORTANT TO YOU WHEN YOU SELECT A PRIMARY GROCERY STORE, THAT IS, THE GROCERY STORE OR SUPERMARKET WHERE YOU SPEND THE MOST MONEY ON ALL GROCERIES.

HIGH-QUALITY FRUITS & VEGETABLES

For the fourth straight year, nine out of 10 shoppers (89.8%) call this “very important” in determining their choice of a primary supermarket. No other aspect of the store comes close in importance. This #1 standing was 90.8% in 2012, 90.0% in 2013 and 91.5% in 2014 – and the streak extends as Americans seek to eat healthier.

The heaviest grocery spenders (91.5% who spend \$81-\$100 per week, and 91.6% who spend \$101 and more) drive this response. Seniors 65 and older do too (96.8%). The youngest shoppers polled (87.5% of those age 24 and younger) express this more strongly than in prior years (83.8% in 2014 and 80.6% in 2013).

Very Important	89.8%
Somewhat Important	9.1%
Not Too Important	0.7%
Not At All Important	0.5%

A CLEAN, NEAT STORE

Impressions count. This measure retains its #2 status for store selection, up this year (83.3%) from last year’s 82.2% “very important” rating. Heavy grocery spenders lead this response (87.9% who spend \$81-\$100 per week and 85.3% who spend \$101 or more), as well as African-Americans (91.7%), seniors 65+ (88.7%), and females (84.4%).

Very Important	83.3%
Somewhat Important	16.2%
Not Too Important	0.5%
Not At All Important	0%

ACCURATE SHELF TAGS

A full-point jump in 2015 (to 80.7% “very important”) follows last year’s dramatic five-point leap to 79.6% for this #3 determinant of a primary supermarket. This sensitive measure suggests how closely households aim to stick to budgets – they have little choice with stagnant wages and rising food, health care and housing costs. Add in the 16.2% “somewhat important,” and that’s nearly everyone who wants accurate bills. Retailers bear the onus to be precise in the complex world of everyday pricing, promotions and price changes in order to be trusted.

Very Important	80.7%
Somewhat Important	16.2%
Not Too Important	2.5%
Not At All Important	0.6%

2: IMPORTANCE OF SUPERMARKET FEATURES



SELLING PRODUCTS BEFORE “USE BY/SELL BY” DATE

Despite a two-point ratings drop from a year ago (to 76.0% “very important”), more than three-quarters of shoppers still insist on product dates that keep them confident of the taste, quality, nutrition, freshness and shelf life of foods and beverages they buy. For this #4 driver of store choice, today’s composite “very/somewhat important” figure of 94.0% is down from 95.9% in 2014 and 97.0% in 2013.

Very Important	76.0%
Somewhat Important	18.0%
Not Too Important	4.4%
Not At All Important	1.6%

HIGH-QUALITY MEATS

Rounding out the Top 5, this measure (74.0% “very important”) pretty much sustains its three-point jump of 2014, when it peaked at 74.4%. With protein a dietary essential – and the Paleo trend riding high – high-quality meats are a key influence on store choice despite rising prices. Mix in the 17.6% who say “somewhat important,” and that’s 91.6% for whom high-quality meat looks to be a common center-plate for dinners at home.

Very Important	74.0%
Somewhat Important	17.6%
Not Too Important	3.7%
Not At All Important	4.7%

The heaviest grocery spenders (from 77%-80% who spend at least \$61 per week and as much as \$101+ per week) put the juice in this trend. Others with bite: Asians (82.6%), males (78.4%), older shoppers (73.9% of the 50-64 age group, and 78.9% who are 65+), and the wealthiest respondents (78.2% who earn \$165,001+ per year).

COURTEOUS, FRIENDLY EMPLOYEES

A nearly universal sentiment – shoppers feel better spending money in stores where workers are nice to them. A commanding 96.5% say it is “very/somewhat” important to their choice of a primary supermarket. Indeed, nearly two-thirds (62.9%) say “very,” which is well above last year’s 59.2%, 2013’s 48.5%, and 2012’s 46.4%.

Very Important	62.9%
Somewhat Important	33.6%
Not Too Important	3.3%
Not At All Important	0.2%

2: IMPORTANCE OF SUPERMARKET FEATURES



PERSONAL SAFETY OUTSIDE THE STORE

Shoppers have to want to approach the supermarket and feel secure doing so. The outside context is critical in terms of lighting, visibility, security, cleanliness and sure footing.

More than nine in 10 shoppers (91.4%) feel this is “very/somewhat” important to their choice of a primary food store (62.9% say “very”). This is down slightly from 92.3% in 2014, but up from 90.5% in 2013.

Older shoppers watch this carefully: 69.7% of people age 65+ regard this as “very” important. So do females (64.9%), African-Americans (75.0%), and 64.9% of households with annual incomes between \$45,001 and \$85,000.

Very Important	62.9%
Somewhat Important	28.5%
Not Too Important	6.8%
Not At All Important	1.8%

ITEMS ON SALE OR MONEY-SAVING SPECIALS

A bounce of nearly 10 percentage points for deals – to 59.8% “very” important – exposes the excitement shoppers feel when their bargain hunt is rewarded. Look no further than Walmart grocery sales to see EDLP doesn’t stir shoppers the same way. People love the rush – even more so when their own household budgets are pressed, and they find a hot buy. This measure was 49.1% “very” in 2013 and 50.4% in 2014. The jump to the current measure practically equals the 2010 recession peak of 60.0% - perhaps because effects of the economic recovery haven’t reached millions of consumers yet. Retailers that maximize the impact of trade promotions – and message consumers early and often on their paths to purchase – will earn the most credit for being price-friendly.

Very Important	59.8%
Somewhat Important	32.6%
Not Too Important	6.2%
Not At All Important	1.4%

2: IMPORTANCE OF SUPERMARKET FEATURES



CONVENIENTLY LOCATED

This measure continues to climb up the list of “very” important factors in choosing a primary supermarket. From the #14 spot in 2013 to #10 in 2014, convenience ascends to #9 in 2015, with a majority of shoppers (54.9%) now calling it “very” important. This is nearly two points above last year’s 53.0% “very” rating – a move that hints at the extraordinary time pressures people feel these days.

The current “very” level is a full one-third higher than its 40-ish ratings during the recession and immediate post-recession period. Still, a well-located supermarket can’t bank on convenience alone to earn it traffic. The escalating “very” numbers of many measures point to areas where the store must excel in order to compete with many kinds of food sellers, including online merchants.

For African-Americans (83.3%), shoppers 24 and younger (68.8%), and large households of four (61.2%) and five (55.1%), convenience appears to matter most.

Very Important	54.9%
Somewhat Important	40.6%
Not Too Important	4.4%
Not At All Important	0.1%

A STORE LAYOUT THAT MAKES IT EASY TO SHOP

Shoppers want to save time in navigable aisles. So for the second straight year, a majority (50.3%) regards this as “very” important in selecting a primary supermarket, and 94.0% say “very/somewhat.” When this “very” measure peaked last year at 51.2%, it marked a nearly eight-point jump from 2013 and highlighted the frustration people feel when a store just doesn’t feel right. Both African-Americans (66.7% “very”) and shoppers age 25-39 (55.2%) express this feeling most strongly.

Very Important	50.3%
Somewhat Important	43.7%
Not Too Important	5.5%
Not At All Important	0.5%

2: IMPORTANCE OF SUPERMARKET FEATURES



FAST CHECKOUT

Mobile wallets bring new ways to speed the payment process. Until shoppers more fully embrace the technology, and supermarkets are equipped to accept it, the quickest way to give shoppers what they want – passage out the door – is to keep lines moving with ample cashiers and baggers. This time matters to 96.7% of respondents who say it is “very/somewhat” important to their store selection. Indeed, this 48.4% “very” rating nearly equals last year’s 48.9%, which was up almost nine points from 2013.

In the biggest hurry are: Hispanics (66.7% “very”), Asians (65.2%), high-income households of \$165,001+ (56.4%), shoppers 24 and younger (56.3%), and large households of five or more (55.1%). This is also true for smaller food purchasers – 55.6% who spend \$41-\$60 per week at the supermarket, and 50.0% who spend \$0-\$40, and are used to express lanes, as well as bigger buyers - 49.3% who spend \$101+ per week, and often have the fullest baskets.

Very Important	48.4%
Somewhat Important	48.3%
Not Too Important	3.2%
Not At All Important	0.1%

HIGH-QUALITY SEAFOOD DEPARTMENT

Once again, more than three-quarters of shoppers (76.4%) call this a “very/somewhat” important influence on their selection of a primary supermarket. Though people still seem more comfortable preparing meat meals, just about half of U.S. shoppers (47.6%) seek quality fish for when it’s their dish of the day; this measure nearly matches the 48.8% of 2014.

There is more than a 10-point disparity between smaller and larger households in their taste for sea creatures. Most one- and two-person households cite quality seafood as “very” important, but less than 40% of bigger families on average say the same. This suggests that some parents stretch their food dollars by steering clear of these often-pricey proteins.

Others who want this: seniors 65 and older (65.2% “very”), the highest-income households of \$165,001+ (52.7%), and heavy grocery spenders of \$101+ per week (52.6%).

Very Important	47.6%
Somewhat Important	28.9%
Not Too Important	13.8%
Not At All Important	9.8%

2: IMPORTANCE OF SUPERMARKET FEATURES



OFFERS LOCALLY GROWN PRODUCE & PACKAGED GOODS

Supermarkets aim to source more locally these days – some even feature area farmers on their websites – because they understand the benefits shoppers ascribe to foods grown or processed nearby: fresher, tastier, still rich in nutrition. And by supporting these sources, shoppers know they keep money within the local economy.

Nearly nine out of 10 shoppers (87.0%) say this is “very/somewhat” important to their choice of a primary supermarket. A minuscule dip from 2014 (87.2%), this figure beats the 2013 mark (85.0%), and nearly equals the 2012 high of 87.8%.

Leading the “very” important component (43.4% overall) are: shoppers 24 and younger (56.3%), grocery spenders of \$61-\$80 per week (53.6%), and Asians (52.2%).

Very Important	43.4%
Somewhat Important	43.6%
Not Too Important	9.1%
Not At All Important	3.9%

LOW PRICES

A four-point bounce in the “very” important rating to 38.4% underscores the financial pressures that families still feel today - six years since the recession began, and despite government figures that sound more optimistic than life actually is for millions of people. If stores feel they need to keep prices as low as possible in order to compete, the reasons include stagnant wages, rising debt, and food inflation pinching household budgets. The mark is well above last year’s 34.3% “very” important rating as an influence on store choice, yet is still far below the 51.0% levels of 2009 and 2010.

Yet with many kinds of stores selling food these days – among them clubs, extreme discounters and dollar stores – low prices persist for most as an ante to compete. Low prices may only be #14 on the list, but they never seem to leave shoppers’ minds.

Low prices are bigger concern for: lower-income households (59.9% “very” important among earners of \$45,000 or less, and 43.1% within the \$45,001-\$85,000 tier), large households of five or more (56.1% “very” important), and the smallest grocery spenders (75.0% who buy \$0-\$40 per week, and 56.8% who purchase \$61-\$80 per week).

Very Important	38.4%
Somewhat Important	56.0%
Not Too Important	5.1%
Not At All Important	0.6%

2: IMPORTANCE OF SUPERMARKET FEATURES



FRESH FOOD DELI OR DELICATESSEN

Three points higher than last year, more than one-third of consumers (34.8%) now say this department is “very” important to their choice of a primary supermarket. This picks deli back up from last year’s 31.5% measure, which was the department’s least-compelling mark in five years. This rebound suggests more demand for the convenience and quality of fresh and prepared food.

In all, seven out of 10 consumers (70.2%) feel deli is a “very/somewhat” important factor in where they shop for food the most. This sentiment is midway between the department’s high mark of 75.0% in 2010 and last year’s low of 66.5%.

Very Important	34.8%
Somewhat Important	35.4%
Not Too Important	22.9%
Not At All Important	6.9%

PAYING ATTENTION TO SPECIAL REQUESTS OR NEEDS

This measure rises to its highest level ever in 2015. More than eight consumers in 10 (80.7%) call this a “very/somewhat” important influence on where they buy food. It eclipses the previous peak mark of 2010 and 2011 (80.3%), and distances by nearly 12 points from the 2013 level of 68.9%.

Seniors 65 and older (44.3%) stand out as leaders of the 34.1% “very” response.

Very Important	34.1%
Somewhat Important	46.6%
Not Too Important	16.3%
Not At All Important	3.0%

HIGH-QUALITY BAKERY

This tempting department that shoppers may try to resist continues to reap fairly hefty ratings. Well over seven out of 10 shoppers (72.7%) say it is “very/somewhat” important to their decision of where to buy food the most – because they’ll sometimes want to treat themselves, family or friends, or need baked goods for get-togethers, kids’ parties and other occasions.

The “very” important component did slip to 34.0% from 36.3% in 2014 and the peak of 38.0% in 2010.

Very Important	34.0%
Somewhat Important	38.7%
Not Too Important	16.6%
Not At All Important	10.7%

2: IMPORTANCE OF SUPERMARKET FEATURES



ORGANIC PRODUCTS

Fewer than three in 10 adults (29.7% “very” important) favor a supermarket because of organic foods. Yet an organic presence does matter to two-thirds of consumers overall (66.5%) when combining the “very/somewhat” response. This figure is nearly two points higher than 2014’s 64.7% - but see easing of organic fever in the slight dip of “very” from last year’s 30.1%. Right now, organic importance is midway between 2013’s 61.4% and the 67.4% of 2012 and 2011.

Households that earn \$85,001-\$125,000 per year (34.7%), females (33.8%), and the heaviest grocery spenders of \$101+ per week (33.6%) lead the overall 29.7% “very” important response.

Very Important	29.7%
Somewhat Important	36.8%
Not Too Important	20.3%
Not At All Important	13.2%

A FREQUENT SHOPPER PROGRAM OR SAVINGS CLUB

As shoppers continue to look to save money, they view loyalty programs as direct paths to discounts. That’s the likely reason why 63.2% - more than last year’s 61.8% - now say these are “very/somewhat” important influences on their choice of a primary supermarket.

The “very” component (26.6%) is nearly two points higher than last year’s 24.9%, which itself was up from 22.0% in 2013. This measure is now the closest it has been in a while to the 28.0% peak of 2010, when the U.S. was still in recession. While practical savings drive this level of importance today, if retailers ran more compelling programs with special food experiences, exclusive events and targeted deals for cardholders, they could win them over emotionally as well.

Frequent cardholder programs are most valued by the three lowest-income tiers (34.6% “very” important who earn \$46,001-\$85,000 annually, 27.9% who earn \$0-\$45,000, and 27.5% who earn \$85,001-\$125,000), as well as seniors 65 and older (30.8%) and females (30.1%).

Very Important	26.6%
Somewhat Important	36.6%
Not Too Important	24.1%
Not At All Important	12.8%

2: IMPORTANCE OF SUPERMARKET FEATURES



GOOD SELECTION OF ETHNIC OR CULTURAL FOODS

This figure continues to hover above the two-thirds of America mark as a “very/somewhat” important factor in the selection of a primary supermarket. This latest 69.2% rating is slightly lower than 2014’s 70.5%. Yet it is still well above 2013’s 65.5%. Attribute this measure’s influence to the growth of ethnic populations, our nation’s overall greater exposure to foods of many cultures – and a desire by most to put new, interesting foods on the dinner table at home.

This seems most pivotal to: Millennials 24 and younger (43.8%), people living alone (29.8% “very” important), upper-end households (29.2% who earn \$125,001-\$165,000 yearly), and ethnic groups African-Americans (50.0%), Asians (39.1%) and Hispanics (33.3%).

Very Important	24.8%
Somewhat Important	44.4%
Not Too Important	22.5%
Not At All Important	8.3%

NUTRITION AND HEALTH INFORMATION AVAILABLE FOR SHOPPERS

While the presence of nutritional insights in-store is “very/somewhat” important to store choice for precisely two-thirds of consumers (66.7%), this figure represents the fourth year of a steady slide from 2014’s 68.1% level, 2013’s 73.0%, 2012’s 73.6%, and 2011’s 76.0%.

This doesn’t mean less determination by consumers to eat healthier. Rather, we think consumers may be researching their food choices earlier in the path to purchase – and they have many sources to draw from, including apps. We also think accessible dietitians can provide a reassuring safety net for shoppers looking to improve their diet, decipher food packages, and match foods to specific health conditions. If they can be reached via a retailer’s website too, that allows them to influence early in the shopping trip-planning process.

Seeking this most: the youngest shoppers (50% who are 24 and younger, and 29.5% between 25 and 39), African-Americans (41.7%), and moderate food purchasers (28.4% who spend \$41-\$60 per week, and 28.2% who spend \$61-\$80).

Very Important	24.5%
Somewhat Important	42.2%
Not Too Important	22.5%
Not At All Important	10.8%

2: IMPORTANCE OF SUPERMARKET FEATURES



PRIVATE LABEL OR STORE BRANDS

It's more than a persistent desire to save that drives the influence of private label on store choice. It's also the product, variety and package upgrades retailers have made - these lead many to see PL as an acceptable alternative to brands at a lower price. This latest 67.7% "very/somewhat" important mark is very close to the 2010 recession high of 69.0%, when savings motivated pretty much all shopping lists.

Private label's importance is near its highest level in four years - 66.5% in 2014, 64.3 in 2013, 65.6% in 2012, and 68.0% in 2011. This is a good sign for retailers seeking extra margin dollars and traffic in center-store, as well as a stronger value image through exclusive products. The "very" component did slip a bit, however, from 23.3% in 2014 to 22.4% today.

Store brands matter most to: the two lowest household income tiers, up to \$85,000 annually (23.4% to 28.5%), households of 3, 4, 5 or more (25.8% to 26.9%), the two lowest spending tiers up to \$60 per week (30.9% to 36.4%), and seniors 65 and older (28.7%).

Very Important	22.4%
Somewhat Important	45.3%
Not Too Important	24.6%
Not At All Important	7.7%

BEING ACTIVE OR INVOLVED IN THE COMMUNITY

Retailers that support local charities and sports teams, and extend themselves when natural disasters hit, are noticed by nearly six in 10 consumers (58.2%) who say such behaviors are "very/somewhat" important to their selection of a primary supermarket. For independents, it's a way to help keep their hometown edge. This latest figure is slightly above 2014's 57.8% - though the "very" component of 16.4% is a bit below last year's 16.8%.

Very Important	16.4%
Somewhat Important	41.8%
Not Too Important	24.9%
Not At All Important	16.9%

SELF-CHECKOUT/SELF-SCANNING

Let's say consumers don't want to do retailers' work for them: more than six out of 10 (61.4%) say this is "not too important/not at all important" to their choice of a primary food store. This is the highest level ever - up from last year's 60.9%. Especially with mobile payments on the rise, people who want to speed through the front-end will soon have easier ways to achieve this.

Very Important	13.1%
Somewhat Important	25.5%
Not Too Important	33.7%
Not At All Important	27.7%

2: IMPORTANCE OF SUPERMARKET FEATURES



MOBILE MARKETING

Retailers that accept digital coupons, offer check-in rewards and run apps are positioning for tomorrow's success – though today's survey figures don't yet show much traction for these abilities. However, shoppers increasingly want stores in digital sync with them – some 42.4% already say these digital skills are “very/somewhat” important to their choice of a primary supermarket.

Very Important	12.3%
Somewhat Important	30.1%
Not Too Important	31.7%
Not At All Important	25.9%

PHARMACY

Although just three consumers in 10 (29.7%) feel the Rx counter is “very/somewhat” important to their selection of a primary food store, this number could rise as more people age, acquire ailments such as diabetes, and prefer the one-stop convenience of health care expertise along with their food buys. This figure tops last year's 28.1%, 2013's 26.4%, and 2012's 27.6%.

Very Important	10.6%
Somewhat Important	19.1%
Not Too Important	27.2%
Not At All Important	43.1%

DIETITIAN PRESENCE

Nearly one consumer in five (18.9%) regards dietitians as “very/somewhat” important to their choice of a primary supermarket. Three reasons likely drive this measure – dietitians' escalated presence in stores and on retailer websites, media coverage about the helpful guidance dietitians can bring, and consumers' own objectives to eat smarter.

Very Important	6.6%
Somewhat Important	12.3%
Not Too Important	36.0%
Not At All Important	45.2%

Since access to dietitians is “very” important to consumers 24 and younger (31.3%), this looks to be a measure on the rise – pivotal to stores aiming to attract the next generation of shoppers.

2: IMPORTANCE OF SUPERMARKET FEATURES



ADVANCED DELI-ORDER TECHNOLOGY

This isn't a deal-breaker for three-quarters of consumers (78.2% "not too important/not at all important") - yet this technology's convenience adds value for everyone else. Why wait on a long deli line if you could key in your order at walk-in, shop the rest of the store, and simply pick up your bagged items before checking out? The "very" component is just 5.7%, but this could rise as placement of the order kiosk, website options and order execution improve.

Very Important	5.7%
Somewhat Important	16.1%
Not Too Important	37.5%
Not At All Important	40.7%

ONLINE BUYING SERVICE

This past year saw a blossoming of food deliverers in key cities and expansion to new markets. They anticipate this will soon make a difference to consumers, who are increasingly aware of these options for home or office delivery, or click-and-collect at the store. For now, the vast majority of consumers (84.8% "not too important/not at all important") don't figure this much into their selection of a primary supermarket.

Very Important	4.5%
Somewhat Important	10.7%
Not Too Important	28.8%
Not At All Important	56.0%

GAS PUMPS/GASOLINE

Some chains continue to run cents-off promotions with grocery purchases. This helps their value image - but beyond that, most consumers don't feel gasoline is a major factor in where they buy most of their food. Just 4.4% say this is "very important" to their choice of a primary supermarket.

Very Important	4.4%
Somewhat Important	12.2%
Not Too Important	24.4%
Not At All Important	59.1%

CHILDCARE

Moms depend on supermarkets to feed their kids - not to watch them. Fewer than one in 50 (1.8%) regard this service as "very important" to where they food-shop. This number has stayed consistent throughout the history of this survey.

Very Important	1.8%
Somewhat Important	2.8%
Not Too Important	9.1%
Not At All Important	86.3%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



PLEASE RATE YOUR PRIMARY FOOD STORE ON SEVERAL ASPECTS:

A CLEAN, NEAT STORE

After six straight years of "excellent" gains that made this the top trait of stores, the 2015 figure dips slightly to 58.6% from 2014's 59.4%. That's not enough to lose the #1 perch. The streak of recent years rose from 51.0% "excellent" in 2009 to 55.0% in 2010, 56.0% in 2011, 57.3% in 2012, and 57.6% in 2013.

Excellent	58.6%
Good	35.7%
Fair	5.5%
Poor	0.1%

CONVENIENTLY LOCATED

An overwhelming majority of consumers (94.8%) say their primary supermarket is convenient to where they live or work. However, the 2015 "excellent" rating (57.6%) slips beneath last year's 58.9%, 2013's 58.1% and 2012's 59.5%, but is above 2011's 56.0%.

Excellent	57.6%
Good	37.2%
Fair	4.3%
Poor	0.8%

SELLING PRODUCTS BEFORE "USE BY/SELL BY" DATE

Shoppers don't want to play the dating game when they shop. Retailers rotate products well enough at the shelf to earn a 52.6% "excellent" rating. This is practically as high as last year's peak 52.8% mark, which extended a five-year climb that began with 2010's 46.0%, 51.0% in 2011, 51.2% in 2012, and 52.3% in 2013. This latest "excellent/good" measure (92.8%) is the lowest since 2010's 91.0%.

Excellent	52.6%
Good	40.2%
Fair	5.9%
Poor	1.3%

COURTEOUS, FRIENDLY EMPLOYEES

Did supermarkets send their staffers to charm school? This trait – one of only four to garner "excellent" ratings from a majority of consumers (52.4%) – is up nearly four points from 2014's 48.7% "excellent" mark. Their relationship with customers is key to earning trips, especially at independent supermarkets, which are often thought of as warmer places to shop. Although the combined "excellent/good" mark (88.3%) isn't the highest ever, the "excellent" score is well above any of the past five years.

Excellent	52.4%
Good	36.0%
Fair	9.0%
Poor	2.6%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



PERSONAL SAFETY OUTSIDE THE STORE

Nine out of 10 shoppers (90.3%) rate their favorite supermarket "excellent/good" on this measure – a mark barely below 2014's 91.0%, 2013's 90.8% and 2012's 91.4%. Better is the rise in the "excellent" component to 48.4% - a survey record for this measure vs. 2014's 46.1%, 2013's 46.8%, 2012's 46.6%, 2011's 41.1%, and 37.0% in both 2010 and 2009.

Excellent	48.4%
Good	41.9%
Fair	8.0%
Poor	1.7%

HIGH-QUALITY FRUITS & VEGETABLES

Ever-higher "excellent" ratings show supermarkets stepping it up in produce to earn repeated trips. Nearly half of consumers (47.9%) give this top score in 2015, up a nibble from 47.6% last year; that was a four-point jump from 43.5% in 2013, when people really began to see the difference. If scores weren't high in this stage-setting department, supermarkets would be less differentiated from other channels.

Excellent	47.9%
Good	42.1%
Fair	8.4%
Poor	1.6%

Consumers 24 and younger (62.5% "excellent") and 65 and older (51.9%), Hispanics (55.6%) and males (54.7%) were the most generous in rating stores on produce quality.

PRIVATE LABEL OR STORE BRANDS

Consumer enthusiasm for store brands in their favorite food stores is on par with 2014, when "excellent" ratings shot five points past the 40.7% average levels of the prior three years. In 2015, the 45.5% "excellent" mark sustains that gain, practically matching the 45.8% level of 2014. This hold is meaningful - it suggests people notice changes in PL products and packages, and buy them for reasons beyond savings.

Excellent	45.5%
Good	42.8%
Fair	8.2%
Poor	3.5%

Grocery spenders of \$41-\$60 per week (56.8%), consumers 24 and younger (56.3%), five-person households (55.1%), and the three lowest income tiers up to \$125,000 per year (47.1% to 50.0%) lead the "excellent" ratings.

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



HIGH-QUALITY MEATS

An "excellent" rise of more than two points to 44.9% from last year's 42.6% reflects juicier choices at the meat case. Supermarket butchers are finding ways to make most cuts appealing – even less expensive ones sought by savers – and people reward that attention to quality.

The combined "excellent/good" rating topped out last year at 90.3%. This settles back down to 85.4% in 2015 – a finding we believe reflects consumer interest in alternative proteins at lower costs.

Excellent	44.9%
Good	40.5%
Fair	12.8%
Poor	1.8%

ACCURATE SHELF TAGS

Nearly nine out of 10 survey respondents (89.5% "excellent/good") voice confidence in shelf pricing at their primary supermarket. This is less than last year's 92.8%, yet the "excellent" component holds steady at 41.8% - a full year after it jumped from 2013's 39.1% and 2012's 40.1%.

Excellent	41.8%
Good	47.7%
Fair	8.8%
Poor	1.7%

ITEMS ON SALE OR MONEY-SAVING SPECIALS

A near four-point leap in "excellent" ratings to 41.4% shows how much better supermarkets are planning and executing trade promotions in 2015, with the help of technology-enabled, data-driven CPG suppliers. Best Practices in establishing deals, targeting audiences and communicating these ways to save are more polished – and consumers see the difference. This latest mark eclipses the 41.0% of the 2010-2011 recession period, and outdistances the intervening years of 2012 (34.7%), 2013 (35.4%) and 2014 (37.6%).

Excellent	41.4%
Good	46.2%
Fair	11.0%
Poor	1.4%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



A STORE LAYOUT THAT MAKES IT EASY TO SHOP

Four out of 10 consumers (40.0%) score their favorite food store "excellent" on layout. This virtually matches last year's 40.1%, and sustains a gain notched in 2014. This hold means supermarkets deliver a convenience that enhances trip speed and helps clear shoppers' minds for purchase decisions. This helps to differentiate from other channels - and this edge could eventually grow for supermarkets as they introduce and refine smaller formats. Meanwhile, the composite 87.7% "excellent/good" rating in 2015 is lower than last year's 89.9%, but above 2013's 86.8%.

Excellent	40.0%
Good	47.7%
Fair	10.3%
Poor	2.0%

FAST CHECKOUT

A fourth straight year of "excellent" gains means less foot tapping on lines and blank stares at cashiers. Between new payment methods, more baggers at some chains, and self-checkouts drawing some of the flow, the perception is speedier. The 2015 "excellent" rating (31.5%) beats 2014's 29.2%, 2013's 27.3%, 2012's 26.0%, and 2011's 23.0%. There's still more room to improve - more than half (51.6%) say their stores are just "good" on this measure.

Excellent	31.5%
Good	51.6%
Fair	13.4%
Poor	3.5%

OFFERS LOCALLY GROWN PRODUCE & OTHER LOCALLY SOURCED PACKAGED GOODS

For the first time, more than seven consumers in 10 (72.9% "excellent/good") endorse efforts by their primary supermarkets to sell products from local food growers and other nearby food purveyors. This measure burst past the two-thirds mark in 2014 (67.9% "excellent/good," including 27.3% "excellent"), as well as the 25.4% "excellent" level in 2013, 24.1% in 2012, 23.0% in 2011, 21.0% in 2010, and 18.0% in 2009.

Excellent	30.8%
Good	42.1%
Fair	21.1%
Poor	6.0%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



OFFERS ORGANIC FOOD OF ALL KINDS, INCLUDING PRODUCE & PACKAGED FOODS

A record three-fourths of consumers (75.5%) rate their primary supermarket "excellent/good" on providing organic foods. This is a strong position for stores aiming to woo healthier-eating households. The rise from 2014's 74.7%, 2013's 70.3% and 2012's 71.8% suggests a tighter embrace of supermarkets by progressive eaters, who have many suitors from Walmart to 7-Eleven and farmers' markets.

Excellent	30.1%
Good	45.4%
Fair	20.9%
Poor	3.6%

The most generous scorers include Millennials age 24 and younger (43.8% excellent), 25-39 (36.2%), and seniors 65+ (36.8%).

STORE HAS A FREQUENT SHOPPER PROGRAM, WHICH OFFERS REWARDS AND BENEFITS

Far below the 2011 peak year when 58.0% of consumers scored loyalty programs at the primary supermarket "excellent/good," and a notch below 2014's 52.4%, the 2015 mark of 52.0% still edges out 2013's 51.9% and 2012's 51.0%. The latest "excellent" component (26.4%) is a whisker below 2014's 26.5%, yet is better than 2013's 24.4% and 2012's 24.2%. This middling endorsement suggests how much more retailers could leverage these programs - if indeed they run them. More than one-third of survey respondents (33.5%) say the store they shop in has no such program.

Excellent	26.4%
Good	25.6%
Fair	10.8%
Poor	3.7%

Does Not Apply 33.5%

LOW PRICES

In this bounceback year, primary supermarkets gain more than three points in "excellent" ratings - to 24.2% vs. 2014's 20.8% and 2013's 21.1%. Add in the 51.6% "good" grades, and more than three-quarters of U.S. consumers (75.8%) look favorably on store efforts to compete on price; that's slightly below last year's 77.1% measure, but above 2013's 74.6% and 2012's 75.5%. Independents lack the scale to lead on price - neither do most supermarkets as a general rule - so it's good that people shop their favorite stores for many reasons beyond sharp prices.

Excellent	24.2%
Good	51.6%
Fair	21.1%
Poor	3.1%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



PAYING ATTENTION TO SPECIAL REQUESTS OR NEEDS

Individual situations may not come up often, but when a primary supermarket is accommodating, it can build an unshakable connection with shoppers. Nearly one-fourth of survey respondents rate their favorite store "excellent" on this measure (23.7%), and nearly three-fourths (71.5%) "excellent/good." The "excellent" rating is the best yet – above 2014's 21.2%, 2013's 21.5%, 2012's 19.7% and 2010's and 2011's 21.0%.

Excellent	23.7%
Good	47.8%
Fair	21.3%
Poor	7.2%

HAVING NUTRITION & HEALTH INFORMATION AVAILABLE

With only about one-fifth of consumers rating their primary supermarket "excellent" on this measure (20.9%), it hardly matters that this is a near three-point jump from 2014's 18.2% level. Stores could improve in helping households eat smarter by providing more clear, visible information in kiosks, at shelves, on websites, and conveyed to shoppers' mobile devices. This latest "excellent" rating still doesn't match 2013's 22.6% - nor does this latest "excellent/good" grade (64.0%) come close to 2013's 69.5%.

Excellent	20.9%
Good	43.1%
Fair	26.4%
Poor	9.6%

MOBILE MARKETING

In a positive shift, a majority of consumers (54.5%) now say their primary supermarkets have "excellent/good" skills on this measure. By contrast, in 2014 most surveyed (52.8%) felt stores did a "fair/poor" job of informing and incentivizing them via mobile apps, check-in rewards and digital coupons.

Excellent	19.1%
Good	35.4%
Fair	24.9%
Poor	20.6%

ADVANCED DELI-ORDER TECHNOLOGY

This year, most consumers (55.2% "excellent/good") feel their primary supermarkets use technology well to speed deli service and keep lines to a minimum. Last year, a majority (50.1%) rated stores "fair/poor" on this measure. The turnabout could lead to more high-margin sales rather than have shoppers simply avoid this department and the stultifying waits that could mar performance and overall store image.

Excellent	13.2%
Good	42.0%
Fair	22.1%
Poor	22.6%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



DIETITIAN PRESENCE

Primary supermarkets cross a threshold on this measure in 2015. More than one-quarter of consumers (27.1%) say their favorite stores are “excellent/good” at providing this service. Last year, the figure was just 22.6%. If this reflects demand for a more visible dietitian presence on selling floors or retailer websites, it suggests a path for food stores to enhance their wellness credibility, help households eat smarter overall, and identify, locate and purchase appropriate foods for specific health conditions. Younger consumers (31.3% of those age 24 and younger, and 15.2% between 25 and 39) drove the “excellent” response.

Excellent	8.2%
Good	18.9%
Fair	23.2%
Poor	49.7%

WHICH SIZE STORE WOULD YOU PREFER FOR MOST OF YOUR FOOD-BUYING TRIPS?

For the fifth straight year, most consumers (57.8%) favor the 30,001-50,000 square foot format. This peak mark tops the previous high of 57.0% posted in 2011 and last year's 55.7%. This conventional size is by far the most popular – it earns triple the number of mentions of the #2 choice, the 50,001-70,000 combination store format (19.3%), which also grew from last year's 17.3%. Most smaller formats fell flat in the 2015 survey: the small conventional size of 17,001-30,000 square feet slipped to 9.7% from 10.7% last year; the fresh to go 4,001-17,000 square foot design edged down to 4.0% from 4.8% last year; while the convenience 4,000 square foot or less store bumped up to 1.1% from 0.9% last year. Meanwhile, supercenters tailed off to 8.2% from 2014's 10.6%, indicating that shoppers will spend only so much time and energy to snare a deal.

4,000 sq. ft. or Less i.e. Convenience Store	1.1%
4,001 - 17,000 sq. ft. Store i.e. Fresh to Go Store	4.0%
17,001 - 30,000 sq. ft. Store i.e. Small Conventional Store	9.7%
30,001 - 50,000 sq. ft. Store i.e. Average Store	57.8%
50,001 - 70,000 sq. ft. Store i.e. Combination Store	19.3%
70,000+ sq. ft. Store i.e. Supercenter	8.2%

3. RATE YOUR PRIMARY STORE'S PERFORMANCE



IF YOUR PREFERRED SIZE STORE WAS CONVENIENT TO YOUR HOME, AND PRICE/QUALITY WAS ABOUT THE SAME AS WHERE YOU SHOP NOW, WOULD YOU SWITCH STORES?

One out of five adults (21.4%) would definitely switch supermarkets if the size felt right and the stores were generally comparable. Also, nearly half (47.0%) would try out the new store. Combined, that's more than two-thirds of shoppers willing to consider a change - and that should be enough to keep retailers awake at night if they haven't done enough to keep shoppers visiting their stores.

The combination of last year's figures were a bit more riveting (25.9% "switch" and 46.9% "try it out"), yet primary supermarkets remain vulnerable to restless shoppers open to better choices.

Most prone to switch: Millennials 24 and younger (31.3%), shoppers that spend \$61-\$80 on groceries per week (27.3%), the highest-income households of \$165,001+ (26.4%), Asians (26.1%), and two-person households (24.2%).

I would try it out	47.0%
Yes, I would definitely switch	21.4%
No, I like my current store enough to keep shopping there	18.2%
No, size is not a main factor for me in store choice	13.4%

DO YOU FEEL THAT YOUR CURRENT PREFERRED STORE IS SIZED ABOUT RIGHT FOR YOUR NEEDS?

Three-quarters of consumers (74.9%) say their primary supermarket feels "perfect" - slightly above 2014's 74.7%, 2013's 73.2%, and 2012's 73.8%. Their biggest complaints: too little assortment (12.5%) and too much walking (6.1%).

Yes, it is perfect for me	74.9%
No, too small, too little assortment	12.5%
No, too big, too much walking	6.1%
No, too small, aisles too narrow for comfort	5.9%
No, too big, too much assortment	3.6%
No, too small, not enough service	3.0%

4: SATISFACTION & IMPROVEMENTS



REGARDING THE LOCATION WHERE YOU PURCHASE THE MAJORITY OF YOUR FOODS:

SATISFACTION WITH PRIMARY STORE MEETING MY NEEDS

(1 is poor, 10 is excellent)

A good rebound from last year's precipitous drop of 5.6 points, 2015 shows a 1.5 point jump in the percentage of consumers rating their primary supermarket an 8 or above (now at 67.3%). Retailers apparently heeded last year's warning, when high satisfaction scores reverted to 2012 levels after peaking in 2013.

Better news yet. The Ten (excellent) grades move up to 13.3% from 11.4% in 2014, and the nine scores jump to 24.6% from last year's 21.5%, while the eight marks dip to 29.4% from 33.0% in 2014.

One (Poor)	0.9%
Two	0.3%
Three	1.1%
Four	2.5%
Five	5.2%
Six	4.5%
Seven	18.2%
Eight	29.4%
Nine	24.6%
Ten (Excellent)	13.3%

4: SATISFACTION & IMPROVEMENTS



REGARDING THE LOCATION WHERE YOU PURCHASE THE MAJORITY OF YOUR FOODS:

IMPROVEMENTS CONSUMERS WANT IN THEIR PRIMARY FOOD STORES

(Does not add up to 100% because of multiple responses)

The Top 4 improvements consumers want remain in the same sequence as in 2014, 2013 and 2012. However, their strength of conviction varies – and there is a new want within the Top 5.

Price/cost savings distances itself from the rest by rising to 37.2% - up from 2014's 36.1%, but still not near the 38.2% of 2013, 42.9% of 2012, or the 2009 recessionary peak of 48.0%. Meanwhile, more locally grown foods (30.6%) slides to a multi-year low of wanting – beneath 2014's 32.1%, 2013's 33.5%, 2012's 36.6%, and 2011's 44.0%; this dip could simply reflect the better job supermarkets are doing at providing local foods.

Also down is more variety/better assortment/wider choice (22.2%). This three-point difference from 2014's 25.2% and 2013's 26.7% is significant. The #4 want is more fresh-made foods, up to 16.3% from 2014's 14.9%. Reaching the Top 5 this year is more organic foods, which rose to 14.5% from last year's 12.5%; it bumped more ethnic offerings, which dipped to 13.5% from 15.0% in 2014.

While consumers persistently want to save, they also want a stream of fresh foods that work for the healthy, inventive meals they desire to serve at home.

Price/cost savings	37.2%
More locally grown foods	30.6%
More variety/better assortment/wider choice	22.2%
More fresh made foods	16.3%
More organic foods	14.5%
Better customer service/employees	13.7%
More ethnic offerings	13.5%
More gourmet foods	11.4%
No improvements are necessary	10.9%
Offer better quality products	9.0%
Nutritional & other health information	8.9%
More organized	6.7%
Don't know	5.8%
More imported foods	5.1%

5: DATA BREACHES



WOULD A DATA BREACH AT YOUR PRIMARY SUPERMARKET CAUSE YOU TO SHOP ELSEWHERE?

Media constantly report on hackers and data breaches these days. Retailers have been, and could continue to be, among the highest-profile victims. In this 2015 survey, the first time we're asking about this topic, consumers seem to be pretty forgiving. Just one in 20 respondents (4.7%) say they would "definitely" switch stores, one in 10 would "probably" switch stores, and six in 10 (58.8%) say it "depends on the circumstance - a retailer deserves more than one chance." A breach would barely make a difference for another quarter of consumers (16.9% would "probably still shop there" and 8.4% would definitely still shop there).

Definitely	4.7%
Probably	11.2%

Depends on the circumstance - a retailer deserves more than one chance	58.8%
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I'd probably still shop there	16.9%
It makes no difference - I'd still shop there	8.4%

WHAT IF THE RETAILER SUFFERED MORE THAN ONE DATA BREACH?

Patience goes just so far. If a second breach incident occurred, more shoppers would be in play and open to switch stores. In this case, 15.6% would "definitely" shop elsewhere, and 27.9% would "probably seek another store." The proportion of consumers that say "depends on the circumstance" is just 37.0%. For the remaining quarter of consumers, 7.5% would "probably" still shop at the same store, another 14.5% "would shop there, but pay cash," and only 3.0% would definitely stay on as a customer.

I'd definitely switch stores	15.6%
I'd probably seek another store	27.9%
Depends on the circumstance	37.0%
I'd probably still shop there	7.5%
No difference - I'd still shop there	3.0%
I'd shop there, but pay cash	14.5%

6: GREEN



DO YOU KNOW IF YOUR PRIMARY SUPERMARKET FOLLOWS BEST PRACTICES TO MINIMIZE ITS ENVIRONMENTAL IMPACT?

DOES YOUR PRIMARY SUPERMARKET FOLLOW BEST PRACTICES TO MINIMIZE ITS ENVIRONMENTAL IMPACT?

If food stores are doing all they can to be good eco-citizens, they're not getting the word out to consumers. Just one-third of survey respondents (34.6%) say they are aware of responsible environmental practices by their favorite merchants.

Yes	34.6%
No	65.4%

WHAT IF YOU LEARNED THE STORE IS NOT ENVIRONMENTALLY RESPONSIBLE?

Green practices aren't a key trigger for most consumers to consider changing stores. Fewer than one in 20 (4.3%) would "definitely" switch stores if they learned their current favorite wasn't environmentally sound; one in eight (11.8%) say they would "probably" switch; and another one in eight (12.3%) would still shop at the same store, but less often. So there's some business impact. But the vast majority would still spend their green in these less-green stores: nearly a quarter (23.1%) say they'd "shop there the same amount" and nearly half (48.5%) would simply "urge the store to improve."

I'd definitely switch stores	4.3%
I'd probably switch stores	11.8%
I'd urge the store to improve	48.5%
I'd still shop there, but less often	12.3%
It makes no difference to me - I'd still shop there the same amount	23.1%

7: ONLINE DELIVERY



HOW OFTEN DO YOU ORDER ONLINE FROM YOUR PRIMARY SUPERMARKET? OR HOW OFTEN MIGHT YOU DO THIS IN THE FUTURE?

The race is on for online food deliverers to secure footholds in key markets. Newer providers now compete with titans Google and Amazon, as well as established services Peapod and Fresh Direct, for customers. And retailers shore up their ways to offer this service to their shopper bases. While this survey finding states only about one-third of shoppers are open to food delivery today, the industry is betting this will change soon.

Most respondents (68.7%) say they don't use the service currently or don't expect to in the future. Among those open to delivery, retailers and other providers should gear up for three to five deliveries per month at most to these customers. Fewer than 3% indicate their personal demand for six or more deliveries per month.

10 or more times per month	1.2%
6 to 9 times per month	1.4%
3 to 5 times per month	4.6%
1 to 2 times per month	8.9%
Less than once a month	15.2%
Not at all	68.7%

IF A DIFFERENT SUPERMARKET OFFERED ONLINE DELIVERY, WOULD IT CAUSE YOU TO SWITCH STORES?

Eight out of 10 consumers say "no" (79.4%); fewer than two in 10 say "maybe." This service is not a differentiator today.

Yes	3.4%
No	79.4%
Maybe	17.2%

HAVE YOU EVER USED ONLINE DELIVERY FOR FOOD FROM A GROCERY?

Fewer than two in 10 (17.7%) have this experience - a number the industry anticipates may grow significantly, judging by their level of investment in positioning to provide this service.

Yes	17.7%
No	82.3%

7: ONLINE DELIVERY



IF YES, WHICH SERVICE?

Among respondents that have ordered groceries online, their top sources are: a local supermarket (44.1%) and Peapod (25.9%). Amazon Prime has made headway, cited by 10.5% of consumers in this group.

A local supermarket	44.1%
Peapod	25.9%
A different service	21.7%
Amazon Prime	10.5%
Google Shopping Express	4.9%
Fresh Direct	4.9%
Amazon	4.2%
Amazon Fresh	3.5%
InstaCart	2.1%
Amazon Same Day	0.0%

TOP DESIRES WITH ONLINE FOOD DELIVERY

The top consumer concerns by far are: "food arrives in excellent condition" (66.7%), "free or low-cost delivery" (66.0%); "ability to schedule a delivery time, within a narrow window" (49.3%), "same food prices as in-store" (48.6%), and "temperature control of perishables" (40.3%). The Uber aspect of "security - I'm told who will deliver it" matters to fewer than one in 10 (8.3%). These figures establish an important benchmark - 2015 is the first year this survey queried about online delivery.

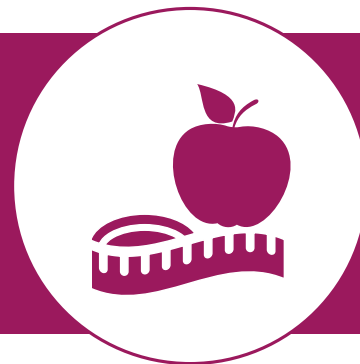
Food arrives in excellent condition	66.7%
Free or low-cost delivery service	66.0%
Ability to schedule a delivery time, within a narrow window	49.3%
Same food prices as in-store	48.6%
Temperature control of perishables	40.3%
Fast delivery	16.7%
Security - I'm told who will deliver it	8.3%
Many payment choices (mobile, PayPal, cash, credit, etc.)	6.9%

PAYMENT PREFERENCES WHEN ORDERING ONLINE

Half of consumers surveyed (49.3%) prefer to pay a fee upon each delivery. This popular choice beats out "pick up food at store for a lower fee or free" (31.3%) and "food is delivered unlimited times for a periodic monthly or annual fee" (19.4%).

Food is delivered for a fee each time	49.3%
Pick up food at store for a lower fee or free	31.3%
Food is delivered unlimited times for a periodic fee (monthly, annually)	19.4%

8: DIETITIANS



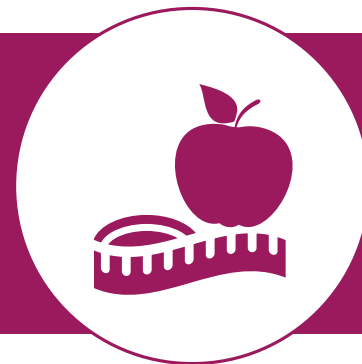
GUIDANCE EXPECTED FROM A STORE'S NUTRITIONIST/DIETITIAN

These professionals are increasingly available in supermarkets – but we believe many consumers aren't aware. That, we feel, is the biggest reason why more than half of U.S. adults "don't expect guidance from a nutritionist or dietitian" (51.2%, up from 51.1% in 2014 and 48.7% in 2013).

Others that would use insights from these experts say they expect this: "general guidance on a balanced diet" (21.3%, up from 20.0% in 2014 and 20.2% in 2013); "general guidance on foods that give good nutritional value for the dollar" (18.6%, up from 15.5% in 2014 and 16.6% in 2013); "best foods for my specific health condition" (14.5%, up from 12.0% in 2014 and 9.9% in 2013); and "label reading, including ingredients and nutritional claims" (12.2%, up from 9.5% in 2014).

	I don't expect guidance from a nutritionist/dietitian	51.2%
General guidance on a balanced diet		21.3%
General guidance on foods that give good nutritional value for the dollar		18.6%
Best foods for my specific health condition		14.5%
Label reading including ingredients and nutritional claims		12.2%
Guidance towards my individual wellness goals		10.1%
How to cook certain foods		10.1%
Foods to stay away from for my specific health condition		9.4%
Weight loss guidance		8.0%
Nutritionally smart holiday entertainment ideas		4.9%
Foods to go with my fitness program		4.6%
Collaborate with the pharmacist, with my permission		3.7%
Other		1.9%

8: DIETITIANS



WHICH SERVICES WOULD YOU PAY FOR?

Nutritionists and dietitians could help supermarkets differentiate and advance their professional service objectives. But it will probably be a while before they generate significant revenue. More than three-quarters of consumers today (77.0%, up from 2014's 71.7% and 2013's 71.2%) resist paying for their guidance.

This leaves nearly one-quarter of consumers who perceive value worth paying for. The help they want most often is: "best foods for my specific health condition" (7.5%, lower than 2014's 9.3% but above 2013's 7.2%); "weight loss guidance" (7.2%, down from 8.0% last year and 7.6% in 2013); and "guidance towards my individual wellness goals" (6.5%, down from 10.0% in 2014 and 2013's 8.3%).

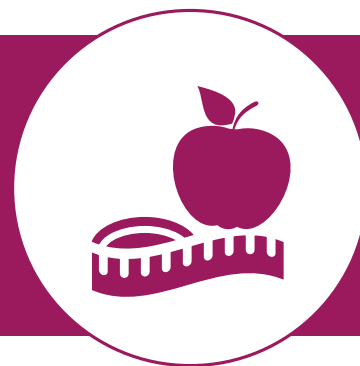
I am not willing to pay for this service		77.0%
Best foods for my specific health condition		7.5%
Weight loss guidance		7.2%
Guidance towards my individual wellness goals		6.5%
Foods to stay away from for my specific health condition		4.4%
Foods to go with my fitness program		4.0%
General guidance on a balanced diet		3.8%
General guidance on foods that give good nutritional value for the dollar		3.8%
Collaborate with the pharmacist, with my permission		2.3%
Other		1.4%
Nutritionally smart holiday entertainment ideas		1.2%

HOW WOULD YOU PREFER TO PAY?

"Fee per consult" (11.5%, down from 14.2% in 2014 and 12.8% in 2013) is more popular than "annual fee" (6.6%, down from 8.1% in 2014 and 10.0% in 2013) among the minority of respondents willing to pay for nutritionist and dietitian services.

I am not willing to pay for this service		75.7%
Fee per consult		11.5%
Annual fee		6.6%
It makes no difference		6.3%

8: DIETITIANS



WHAT'S A FAIR PRICE?

Consumers willing to pay feel that \$25 or less per consult is a reasonable value.

Zero	70.9%
\$25 or less per consult	14.0%
\$26 to \$50 per consult	6.5%
\$51 to \$100 per consult	2.6%
\$100 or more per consult	0.6%
\$50 or less per year	2.7%
\$51 to \$100 per year	1.7%
\$101 to \$200 per year	0.5%
\$201 or more per year	0.8%

WHAT IF YOU RECEIVED DISCOUNTS ON CERTAIN FOODS?

Nearly three consumers out of 10 (28.4%) say this savings could help motivate them to pay for expert services of nutritionists and dietitians. This figure is well below last year's 38.1% and 2013's 36.4%.

Yes	28.4%
No	36.8%
It makes no difference to me	34.9%

9: NUTRITIONAL INFORMATION SOURCES



WHERE CONSUMERS LEARN ABOUT NUTRITION ISSUES ON A REGULAR BASIS

(Does not add up to 100% because of multiple responses)

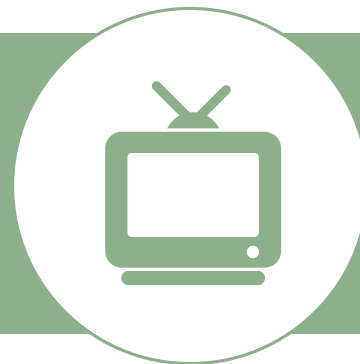
The Internet edges up again as the leading nutrition information resource for two-thirds of American consumers. This 67.0% result tops 2014's 64.4% and moves closer to 2013's 68.4% and 2012's 72.1%. Greater use of smartphones and tablets while shopping make the Internet a more accessible, immediate resource to help sort out purchase decisions – rather than just research at home while planning a store trip.

Magazines retain the #2 slot, though the 32.5% figure is less compelling than last year's 37.8% and 2013's 39.4%. At #3, television rebounds to 17.9% after dipping to 16.9% in 2014 from 19.8% in 2013.

The biggest jump is consumers' growing reliance on the grocery store as a source of nutrition information. In the #4 slot at 17.1%, this is 4.4 points above last year's 12.7%, when it held eighth place. Reasons for its rise could include: the presence of nutritionists and dietitians in stores and on retailer websites, better signage and handouts. Combine this with the 14.5% of respondents who say they specifically rely on nutritionists and dietitians, to appreciate the full guiding influence of the in-store environment.

Internet	67.0%
Magazines	32.5%
Television	17.9%
Grocery store	17.1%
Newspaper	16.2%
Research Journals	15.0%
Friends and family	14.6%
Nutritionist/dietitian	14.5%
Books	10.8%
Doctor	10.4%
Apps	9.6%
Other	7.6%
Food ratings systems in stores, such as Nuval	6.9%
Online communities (e.g., iVillage, Second Life, YouTube)	6.6%
Radio	1.4%

9: NUTRITIONAL INFORMATION SOURCES



WHOM DO THEY TRUST THE MOST?

Only about three consumers in 10 say they trust the Internet the most – we think because it can present conflicting information and fail to shed light on the hidden agendas of various online sources. This 30.5% figure is above last year’s 28.4% but below 2013’s 31.0%.

For the second straight year, nutritionists and dietitians hold the #2 slot – this time at 15.6%, which is a tick below last year’s 15.9% but well above the 11.7% in 2013 and 2012. Research journals are #3 again – this time at 10.4%, which is below last year’s 11.9% but above 2013’s 10.1%. Following are doctors (10.0%, above 2014’s 8.5% but below 2013’s 12.0%) and magazines (8.7%, up from last year’s 8.6% and 2013’s 8.2%).

Internet	30.5%
Nutritionist/dietitian	15.6%
Research Journals	10.4%
Doctor	10.0%
Magazines	8.7%
Friends and family	5.3%
Other	4.3%
Books	4.2%
Newspaper	3.8%
Grocery store	3.3%
Television	2.4%
Online communities (e.g., iVillage, Second Life, YouTube)	1.5%
Radio	0.1%

IMPORTANCE OF NUTRITIONAL RATINGS ON PACKAGES

A four-year slide in the combined “critical/very important” measure reflects consumer skepticism over ratings systems that can complicate rather than simply purchase decisions – because no industry standard exists. The combined 56.4% “critical/very important” result is lower than 2014’s 59.3%, 2013’s 61.2% and 2012’s 68.3%. Today’s 16.6% “critical” mark is less than 2014’s 19.8% and 2013’s 22.1%, while the 39.8% “very important” mark beats 2014’s 39.5% and 2013’s 39.1%. Seniors 65 and older lead the “critical/very important” response (64.3%).

Critical	16.6%
Very Important	39.8%
Somewhat Important	33.4%
Not Important	10.2%

10: NUTRITIONAL CONCERNS



WHAT CONCERNS CONSUMERS THE MOST ABOUT THE FOODS THEY EAT?

In its eighth straight year in the lead, “desire to be healthy/eat what’s good for us,” posts just a 17.0% level of mention – lower than 19.3% in 2014 and 2013, and 23.0% in 2012. Meanwhile, consumers cite “chemical additives” once again as the #2 concern – but only 15.7% of the time, which is down from 16.1% last year and 15.8% in 2013, though up from 13.8% in 2012.

The next three measures all rose at the expense of these top two. “Salt/sodium content, less salt” (13.0%) tops last year’s 9.9% and 2013’s and 2012’s 9.8%. “Sugar content/less sugar” (10.1%) beats last year’s 9.3%, 2013’s 8.4% and 2012’s 7.8%. “Fat content/low fat” (8.6%) is ahead of last year’s 8.2%.

Desire to be healthy /eat what’s good for us	17.0%
Chemical additives	15.7%
Salt/sodium content, less salt	13.0%
Sugar content/less sugar	10.1%
Fat content, low fat	8.6%
Food/nutritional value	7.0%
Calories/low calorie	5.9%
Balanced diet	5.1%
Freshness/purity/no spoilage	4.0%
Carbohydrate content	3.0%
Cholesterol levels	2.4%
Preservatives	1.9%
Other	1.5%
Protein value	1.2%
Don’t know	1.2%
Nothing	0.9%
Fiber content	0.9%
Vitamin/mineral content	0.4%

10: NUTRITIONAL CONCERNS



HOW CONSUMERS DESCRIBE THEIR DIET

For all the buzz about eating smarter, people don't judge themselves too harshly. True, most know they could do better – but it's a bare majority saying this. The 45.3% "could be somewhat healthier" respondents in 2015 combine with the 9.9% "could be a lot healthier" respondents to reach a 55.2% majority. These combined measures were 56.5% in 2014 and 59.3% in 2013.

This is still a vast audience for food retailers' wellness messages, assortments and guidance to eating healthier. A closer look at who drives the "could be a lot healthier" response, the people who might be most receptive to help: consumers 24 and younger (25.0%), the two lowest income groups up to \$85,000 annually (12.8% on average), and spenders of \$41-\$60 on groceries per week (19.8%).

By contrast, one-third of consumers (33.5%) feel their diet "is healthy enough." This is up from 32.6% last year, 29.8% in 2013 and 29.1% in 2012. Another 11.3% say their diet is "as healthy as it could possibly be," up from 10.9% in 2014.

Could be a lot healthier	9.9%
Could be somewhat healthier	45.3%
Is healthy enough	33.5%
As healthy as it could possibly be	11.3%

10: NUTRITIONAL CONCERNS



WHAT PEOPLE EAT TO ENSURE THEIR DIET IS HEALTHY

(Does not add up to 100% because of multiple responses)

“More fruits/vegetables” is the top choice once again – at a record level 75.4%. This steady rise in recent years from 2014’s 74.5%, 2013’s 70.9%, and 2012’s 70.3% distances fresh produce from the rest of the pack.

This is more than 4x the mention of the #2 activity to eat a healthier diet, “more fiber” (17.5%), which was 16.4% in 2014 and 2013, and 20.4% in 2012. Tied for the #3 slot, “more fresh foods” and “more fish” at 15.3%, took different paths to get there. While “more fresh foods” was stronger in second place (20.2%) in 2014, “more fish” was weaker in third place (14.8%) in 2014. Moving up into the #5 slot this year, “more chicken/turkey/white meat” (13.7%) tops last year’s 11.2%. Behaviors listed on this table range from eating more foods in their original forms to eating fewer foods with additives and extra processes.

More fruits/vegetables	75.4%
More fiber	17.5%
More fresh foods	15.3%
More fish	15.3%
More chicken/turkey/white meat	13.7%
Less prepared/processed foods	13.3%
Less junk food/snack food	12.2%
Less carbohydrates	11.4%
More organically grown/natural foods	10.3%
Less bread	9.6%
Less salt/sodium/food low in salt/sodium	8.8%
Less sugar	8.7%
Less fried foods	7.8%
Less calories/food low in calories	7.7%
More balanced diet/more variety	6.1%
More water/bottled water	5.4%
More salads	5.1%
More protein	5.1%
More whole grains	4.6%
Less meats/red meats	4.3%
More calcium	4.2%
Less cholesterol/food low in cholesterol	4.1%
Less soda	3.8%
Less dairy products	3.5%
More foods high in vitamins/minerals	3.2%
Less fats/oils	3.1%
More low fat or skim milk products	1.8%
More foods with antioxidants	1.4%
More vitamin/mineral supplements/pills	1.2%
More dairy products	1.1%
More juices	0.8%
More meat	0.4%
More starches (pasta, beans, rice)	0.3%

10: NUTRITIONAL CONCERNS



DO CONSUMERS UNDERSTAND DIFFERENT FOOD TERMS?

Food marketers use various terms to ascribe positive traits to their products. This survey asks for the first time this year how well consumers feel they understand them. An overwhelming 97.8% of respondents feel they understand "local." Nearly as many (93.8%) say they comprehend "organic." About three-quarters say "natural" (75.1%) and "fair trade" (73.8%) are understandable. Just half (53.6%) believe they know the meaning of "clean."

	Yes	No
Organic	93.8%	6.2%
Local	97.8%	2.2%
Natural	75.1%	24.9%
Fair Trade	73.8%	26.2%
Clean	53.6%	46.4%

SHOULD SUPERMARKETS TEACH FOOD TERMINOLOGY?

Three camps of near-equal size emerge in response to this question, which the survey asks for the first time. Just three in 10 consumers say, "yes, I could use the help" (31.7%). Another 34.2% say, "no, I know this stuff." Another 34.1% say the store isn't an appropriate source – this includes 'no, it's not the store's role" (21.9%) and "no, I trust other sources more" (12.2%).

Yes, I could use the help	31.7%
No, I know this stuff	34.2%
No, it's not the store's role	21.9%
No, I trust other sources more	12.2%

11: DOES YOUR SUPERMARKET CARE ABOUT YOU?



WHICH OF THE FOLLOWING WOULD SIGNAL YOU THAT A SUPERMARKET CARES ABOUT YOU?

(Does not add up to 100% because of multiple responses)

For the fourth straight year, only one store trait means caring to most consumers: “a clean and well-organized store” signifies this to 54.4% of respondents, down slightly from 55.3% last year, but still above 53.9% in 2013 and 52.7% in 2012.

A large share of consumers (40.6%) also connect “produce, meats and seafood are always appealing and fresh” to caring. This is a bit below last year’s 41.6% and 2013’s 40.8%, but still above 38.0% in 2012.

Rounding out the Top 5 are: “fair prices” (32.7%, a tick above last year’s 32.5%, yet below 2013’s 33.7% and tied with the 2012 level); “carries the items and brands that I like” (24.0%, well above last year’s 21.0%, 2013’s 21.5% and 2012’s 20.5%); and has “fresh, local or organic foods available” (20.8%, the same as last year, yet below 2013’s 23.8% and 2012’s 23.7%). These same traits comprised the Top 5 in 2014 as well.

Stores that demonstrate caring could earn more support and the benefit of the doubt from consumers.

Store is clean and well organized	54.4%
Produce, meats and seafood are always appealing and fresh	40.6%
Prices are fair	32.7%
Carries the items and brands that I like	24.0%
Has fresh, local or organic foods available	20.8%
Cashiers (& baggers) are fast, friendly & offer help to my car	17.9%
Fulfills special requests	14.0%
Runs many sales on items I use	13.8%
Items are never or rarely out of date	12.1%
Always in-stock on sale items	11.9%
Ample parking and is well lit	11.5%
Experts (butcher, dietitian, pharmacist) are always accessible	10.3%
Contacts me in event of a product recall	8.2%
Sends me special deals through email, texts or to my cell phone	6.5%
Supports local charities	5.8%
Has special events that are fun or educational (pet days, kid’s cooking contests, guest speakers, cooking classes)	4.4%
Shops and delivers for me, for a moderate fee	2.0%
Suggests creative meal and snack ideas	1.1%

DO YOU BELIEVE YOUR PRIMARY SUPERMARKET CARES ABOUT YOU?

A near two-point rise in grocery shoppers that “absolutely” sense caring from their supermarket (to 39.7%, up from 38.0% last year) likely means stores are getting more executional details right. This is further above 2013’s 36.7% and 2012’s 34.1% - yet the more important figure is the “moderately” response (46.8%, which is way below last year’s 51.8% and 2013’s 52.2%). If supermarkets delivered more completely on what people want, the shift to “absolutely” would be greater.

Yes, absolutely	39.7%
Moderately	46.8%
Barely	9.8%
Not at all	3.7%

12: FOOD TRUCKS



VISITED WITHIN PAST MONTH?

Food trucks increase their trip activity in 2015. Nearly one American in five (18.4%) has gone to one within the past month – up from one in seven (16.8%) in 2014. Mostly, these are consumers age 25-39 (33.3%) or 24 and younger (31.3%), or from the \$165,001+ annual income tier (26.4%) or the \$125,001-\$165,000 group (26.4%).

Yes	18.4%
No	81.6%

ALONE OR WITH ONE OR MORE OTHERS

A food truck visit is increasingly a casual social occasion. Three-quarters of consumers who've gone to a food truck within the past month (74.8%) went with at least one other person; this is up from 66.3% in 2014.

With one or more others	74.8%
Alone	25.2%

WHAT PROMPTED THE VISIT

(Does not add up to 100% because of multiple responses)

Food trucks generate a light, easy vibe. The Top 4 reasons cite for visiting a food truck are the same as in 2014, and in the same order. "Fun" is #1, and the only reason named by the majority of survey respondents (54.7%); this is up from 48.7% last year. Anticipation of "tasty" food is #2 at 46.0%, up from 42.2% last year. "Easy way to try something new" (42.5%) also beats last year's 39.2%. "Impulse, I saw it on the street" (25.9%) dips from 27.1% in 2014. Multiple responses were allowed on this question.

Fun	54.7%
Tasty	46.0%
Easy way to try something new	42.5%
Impulse, I saw it on the street	25.9%
Ethnic	25.2%
It was near other trucks where we have more choices	17.3%
Quick	15.8%
Healthy	12.2%
I saw it on Twitter, Facebook or other social media outlet	11.5%
Cheap	9.4%
An easy meeting place	8.6%

12: FOOD TRUCKS



EXPECTED PURCHASE ACTIVITY IN 2015

Most consumers still don't think they'll buy from a food truck in 2015 (61.3%); that's up from 58.1% last year. Also, fewer feel they'll buy "about the same" (21.6%) as in 2014 (24.0%), or that they'll "buy more" (14.8%) than in 2014 (15.3%).

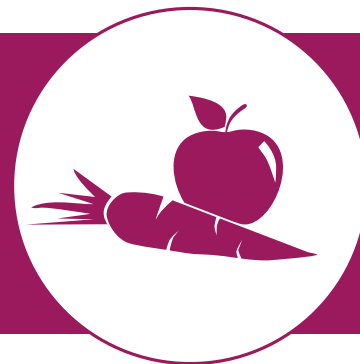
I don't visit food trucks	61.3%
About the same	21.6%
More than in 2014	14.8%
Less than in 2014	2.3%

VISIT FREQUENCY IN 2014

Food truck trips look to be a monthly diversion for fans of their food. The vast majority of food-truck patrons (28.1% of all survey respondents) expect they'll go "less than once a month" in 2015; that's fewer than 29.8% last year. Only 6.7% predict they'll go more frequently - 4.3% "once every three to four weeks", 1.6% "once every two weeks," and 0.8% "once a week or more."

I don't visit food trucks	65.1%
Less than once a month	28.1%
Once every 3 to 4 weeks	4.3%
Once every two weeks	1.6%
Once a week or more	0.8%

13: FRESH FOODS



FOODS THAT DRIVE SUPERMARKET SHOPPING

Perimeter fresh foods are magnets to three quarters of adult shoppers (74.1%). This extends a consistent rise from 66.4% in 2012 to 69.2% in 2013 and 73.6% in 2014, as people grew more motivated to eat healthier. Eight out of 10 (79.3%) of the largest grocery spenders, \$101+ per week, drove this response - as did the highest-income households earning \$165,001+ annually (78.2%).

Fresh	74.1%
Shelf-stable	21.0%
Frozen	4.9%

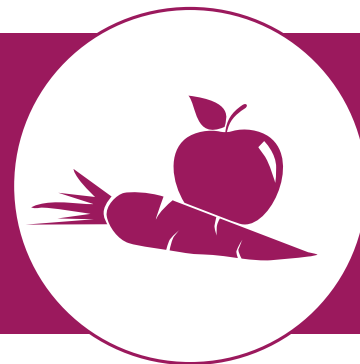
PRESENTATION OF FRESH FOODS

People want Nature's look, scrubbed up. Yet again, clean displays tighten their grip as the #1 most important aspect of fresh-food merchandising. Though its measure did slip nearly a point to 65.8% from last year's 66.6% and 2013's 66.4%, it is still above 2012's 64.4%. Cleanliness managed to extend its lead, however, because the #2 "appealing appearance of food" slid further by three-and-a-half points to 52.3% from 55.8% in 2014; this was still higher than the 48.9% mark of 2013 and 2012.

The third key element, "products are not past sale date," jumped more than three points to 34.8% from last year's 31.7% - closing in on its earlier range of 37.9% in 2013 and 37.5% in 2012. "Packaging that gives me a clear view of product" advanced into the #4 position on the strength of a gain to 23.1% from 21.7% in 2014, 22.7% in 2013, and 22.4% in 2012. Backing down into the #5 slot, "locally grown" fell a point to 21.1% from last year's 22.1%, 2013's 22.4% and 2012's 24.2%.

Cleanliness of display	65.8%
Appealing appearance of food	52.3%
Products are not past sale date	34.8%
Packaging that gives me a clear view of product	23.1%
Locally grown	21.1%
Size appropriate to my needs	18.6%
Organic	14.0%
Packaging that preserves freshness	13.6%
Source traceability	11.3%
Packaging with nutritional information	7.8%
Sustainability	7.3%
Packaging with cooking instructions	3.0%
Brand name	1.5%
Recipes	0.6%

13: FRESH FOODS



MOST IMPORTANT FRESH FOODS DEPARTMENT

Two-thirds of consumers (67.5%) call produce their #1 traffic driver. Though a shade lower than last year's 68.3% (which set a peak for recent years), the 2015 figure is well above 2013's 64.6% and 2012's 67.6%. Meanwhile, meat holds onto the #2 spot at 16.9%, up from 16.3% last year, though not as high as 2013's 18.7%. Dairy dips again to 4.0%, down from 4.7% in 2014 and 5.1% in 2013. Seafood darts down to 2.6% from last year's 4.1% and 2013's 3.8%. Deli doubles to 3.0% from last year's 1.5% and makes the Top 5 for the first time. It bumped prepared foods, despite that category's rise to 2.2% from 1.6% in 2014.

Produce	67.5%
Meats	16.9%
Dairy	4.0%
Deli	3.0%
Seafood	2.6%
Prepared Foods	2.2%
Bakery	1.8%
Poultry	1.7%
Cheeses	0.4%

PROPORTION OF FRESH-FOOD DOLLARS SPENT IN THE SUPERMARKET

Supermarkets continue to rule in fresh-food spend, but their grip may be a bit looser than in recent years. An impressive 81.9% of survey respondents do say they spend more than half of their fresh-food dollars in supermarkets. The problem – this figure is down from 85.9% last year and 84.3% in 2013 and 2012.

91% or more	27.0%
76% to 90%	32.9%
51% to 75%	22.1%
26% to 50%	14.8%
25% or less	3.3%

WHY EAT FRESH FOODS

It looks like consumers are enjoying fresh foods more. "Health" does command a majority response again (55.1%), but it is lower than last year's 57.5% and 2013's 58.2% as the top reason people eat fresh foods. "Taste" narrows the gap in this year's survey at 40.7%, a full two-and-a-half points higher than last year's 38.2%.

Health	55.1%
Taste	40.7%
Convenience	2.2%
Value	2.1%

Leading the "taste" response are: the highest-income households \$165,001+ per year (50.0%), and the heaviest grocery spenders (45.5% who purchase \$81-\$100 of groceries per week, and 42.3% who spend \$101 or more). This finding should create a retailer urgency to emphasize prepared foods, pre-marinated meats and seafood, and inventive yet simple recipes to entice chief household shoppers in search of tasty and healthful meal solutions.

14: CAUSE MARKETING



ARE YOU LIKELIER TO SHOP IN A SUPERMARKET THAT SUPPORTS CAUSES?

“No” is the answer for the largest plurality of consumers (33.8%, up from last year’s 30.7% and 2013’s 33.4%). An absolute “yes” is one of the smallest response bases (12.8%, which is quite a bit lower than last year’s 16.1%, but virtually the same as 2013’s 12.7%). For most (53.5%, which is between last year’s 53.2% and 2013’s 53.9%), this is a gray issue that depends on the retailer’s prices and the causes it supports. Is persistent financial stress affecting the charity people feel they can extend to others? Perhaps.

Yes	12.7%
No	33.8%
Depends on prices	11.8%
Depends on causes	16.7%
Depends on prices and causes	25.0%

WHAT IF PRICES ROSE TO ALLOW FOR DONATIONS?

A potential cap on generosity surfaces in this finding too. A majority of survey respondents (55.3%) say they’d willingly pay up to a 2% price premium; this is nearly as many who said this last year (56.0%), but more than in 2013 (53.6%). Only one in 10 (10.9%) would pay as much as a 5% price premium; this is less than 2014’s 11.8% and 2013’s 11.9%. For one-third of consumers, the price premium makes no difference (33.8%); this figure is between 2014’s 32.2% and 2013’s 34.5%.

Yes, as long as price difference was no more than 2%	55.3%
Yes, as long as price difference was no more than 5%	10.9%
Amount of price difference makes no difference to me	33.8%

TRAVEL DISTANCE TO SHOP IN A “CAUSES” SUPERMARKET

A record number of consumers (55.9%) say they won’t pay more and travel longer today - not with money and time so dear. This nearly two-point rise from 2014’s 54.0% also tops 2013’s 55.1% and 2012’s 53.9%. More than one-fourth of respondents (26.8%) would travel up to a mile or two further - that’s less than last year’s 27.4% - few would stay on the road longer than that for this purpose.

Yes, up to a mile or two further	26.8%
Yes, up to five miles further	12.9%
Yes, up to ten miles further	4.5%
No	55.8%

14: CAUSE MARKETING



PRIVATE LABEL SALES TIED TO DONATIONS

Consumers have been trained to save when buying store brands. So it seems unnatural to pay more, even to support a cause; just one in 10 (9.6%) say they'd "buy more" at a price premium. About two out of three (64.3%) say they'd "buy the same amount"; this is up from last year's 62.9% and 2013's 61.6%.

I'd buy the same amount of them	64.3%
I'd buy less of them	26.1%
I'd buy more of them	9.6%

CAUSES TO SUPPORT

(Does not add up to 100% because of multiple responses)

This year sees a shakeup in the causes consumers prefer their primary supermarkets to support. "Relieving hunger" continues as #1, named by 56.8% of consumers, up from 2014's 56.1% and 2013's 52.4%. "Relieving child hunger" continues as #2, named by 37.7% of consumers, down from 2014's 39.1% and 2013's 40.7%. However, the biggest change on the strength of a 7.2 point jump, "veterans" marched into the #3 slot at 29.1% vs. 2014's 21.9%. "Education" is #4 at 28.3%, a slip from 31.0% a year ago. "Environment" is #5 at 24.5%, a figure slightly above last year's 24.1%.

Prior to 2015, the Top 5 causes had been the same for three years - relieving hunger, relieving child hunger, education, supporting people in disaster-stricken areas, and the environment.

Relieving hunger	56.8%
Relieving child hunger	37.7%
Veterans	29.1%
Education	28.3%
Environment	24.5%
Supporting people in disaster-stricken areas	22.0%
Disease prevention	16.7%
Animal welfare	16.5%
Other social causes	8.5%
Wildlife protection	6.7%
Religion	2.1%

15: CHECKOUT



SATISFACTION WITH CHECKOUT EXPERIENCES

Nearly nine out of 10 consumers affirm for the third straight year that the supermarket checkout pleases them overall: 88.1% say so - a level between last year's 89.3% and 2013's 87.3%, and well above 2012's 81.7%. Leading the "yes, I'm satisfied" response are grocery buyers at both ends of the spectrum - those who buy \$0-\$40 per week (90.9%), and likely use express lanes, and \$101+ purchasers (90.4%). Also, households earning \$85,001-\$125,000 per year (91.6%), Asians (91.3%) and males (91.1%).

Yes	88.1%
No	11.9%

BOTHERSOME ASPECTS OF THE CHECKOUT EXPERIENCE

(Does not add up to 100% because of multiple responses)

For the first time in this survey's history, more than one-quarter of respondents (25.7%) say "does not apply" - which means nothing about this disturbs them. This is up from 23.9% last year.

Moreover, no single gripe rises to a majority level. "Wait time" tops the list at 43.6%, which is lower than last year's 45.4% and slightly above 2013's 43.1%.

Rounding out the Top 5 are: "less-than-careful handling of merchandise by cashier or bagger" (20.1%, down from 2014's 21.4% and 2013's 21.3%); "cashier or bagger attitude" (15.5%, down from 2014's 18.2% and 2013's 17.1%); and "can't easily see prices rung up during the transaction" (13.4%, up from last year's 11.2%).

Wait time	43.6%
Does not apply	25.7%
Less-than-careful handling of merchandise by cashier or bagger	20.1%
Cashier or bagger attitude	15.5%
Can't easily see prices rung up during the transaction	13.4%
Slow transaction speed	12.8%
Lack of bagger	11.5%
Cashier or bagger has a cold and touches my food	9.7%
Inaccurate scanners	9.4%
Lifting merchandise from cart onto conveyor	7.9%
Clutter at front-end gets in the way	7.7%
Slow checking of coupons	5.6%
Payment process complex	1.9%

15: CHECKOUT



IMPROVING THE CHECKOUT EXPERIENCE

(Does not add up to 100% because of multiple responses)

Shoppers want more open lanes to reduce wait time, which is their #1 complaint. Nearly half of survey respondents (48.6%) urge stores to do this - fewer than last year (51.4%) and 2013 (49.5%). The rest of their Top 5 suggestions: "cashiers and baggers more careful handling merchandise" (21.3%, down from 2014's 21.8%, but higher than 2013's 21.0%); "more self checkouts" (17.9%, a tick below last year's 18.0%, but above 2013's 17.4%); friendlier cashiers (15.5%, a tick above last year's 15.4%, but below 2013's 15.9%); "more baggers" (14.8%, down from last year's 15.8%). More than one in five say "does not apply" (20.7%, up from last year's 17.6%).

More open lanes, so less wait time	48.6%
Cashiers and baggers more careful handling merchandise	21.3%
Does not apply	20.7%
More self-checkouts	17.9%
Friendlier cashiers	15.5%
More baggers	14.8%
Faster acceptances of coupons (paper or mobile)	12.3%
Lanes without junk food temptations	10.5%
Lanes with no products merchandised at all	9.7%
Walk-through technology, RFID	9.0%
Blink fast-pay technology, like at a gas pump	5.7%

16: PURCHASE COSTS & FREQUENCY



REGARDING THE LOCATION WHERE YOU PURCHASE THE MAJORITY OF YOUR FOODS:

HOW MUCH FAMILIES SPEND TOTAL EACH WEEK ON FOODS IN ALL STORES/

Setting a record for this decade, the share of U.S. households within the top-spending tier of “more than \$136 per week” on groceries jumps by 2.3 points to 22.7%. This beats last year’s 20.4%, 2013’s 22.1%, 2012’s 21.4% and 2011’s 14.0%.

This increase occurs despite the persistent use of private label, less costly brands, promotional deals and alternate channels by chief household shoppers.

We think demand and inflation offset the savings trends. Specific reasons for bigger weekly spends include: food price hikes, growth of specialty foods as affordable indulgences, healthier purchases, and large multigenerational households consuming more at home.

A collective six out of 10 U.S. households (63.5%) spend \$96 or more per week on retail food. This is up from last year’s 62.0%, and nearly as high as 2013’s 63.6% and 2012’s 64.1%.

The other upper-spending tiers are: \$96-\$105 (12.8%, down from 2014’s 13.7% and 2013’s 13.2%); \$106-\$115 (12.4%, up from 12.1% last year and 10.6% in 2013); \$116-\$125 (8.4%, above 2014’s 8.0% but below 2013’s 9.1%); and \$126-\$135 (7.2%, down from 7.8% last year and 8.6% in 2013).

Less than \$25	0.9%
\$25 - 35	2.1%
\$36 - 45	3.6%
\$46 - 55	6.6%
\$56 - 65	5.6%
\$66 - 75	5.7%
\$76 - 85	6.3%
\$86 - 95	5.7%
\$96 - 105	12.8%
\$106 - 115	12.4%
\$116 - 125	8.4%
\$126 - 135	7.2%

More than \$136 per week 22.7%

FOOD SHOPPING TRIPS PER WEEK

“Once a week” regains the top spot by the barest margin – 30.7% vs. 30.6% for “two times a week” in the #2 spot. Last year was the reverse – “two times a week” was #1 at 32.7% and “once a week” was #2 at 31.8%. But the story of change in 2015 is that these two leading frequencies both lose share to more-frequent visit patterns.

Perhaps to obtain the freshest foods possible and mid-week deals on Quick Trips, the “three times a week” pattern rises to 18.1% from last year’s 17.1%, and “four times a week” moves up to 8.5% from 5.8% in 2014.

By contrast, the “once a week” share back in 2010 was as high as 35.0%, and the “twice a week” share back in 2009 was as low as 16.0% in 2009.

Six or more times a WEEK	1.2%
Five times a WEEK	2.8%
Four times a WEEK	8.5%
Three times a WEEK	18.1%
Two times a WEEK	30.6%
Once a WEEK	30.7%
Every TWO weeks	7.0%
Once a MONTH	1.1%

17: PURCHASE INFLUENCES



REGARDING THE LOCATION WHERE YOU PURCHASE THE MAJORITY OF YOUR FOODS:

INFLUENCES ON FOOD BUYING

(Does not add up to 100% because of multiple responses)

The most popular savings behaviors in this question show shoppers to be opportunists when buying food.

The leading four of the Top 5 head the list for the fourth straight year. "Stock up on an item when you find a bargain" (49.7%) rises from 48.2% in 2014, 46.0% in 2013, and 47.7% in 2012. "Look in newspapers for grocery specials" (43.0%) is higher than 2014's 39.7% and 2013's 42.0%, but is lower than 45.5% in 2012. "Participate in supermarket frequent shopper or savings club programs" (29.0%) retains the #3 slot despite being at its lowest level in recent years, down from 30.1% last year, 29.3% in 2013, and 30.3% in 2012. "Buy products on special even if you hadn't planned to buy them that day" (27.9%) is well above last year's 24.2%, 2013's 22.7% and 2012's 23.7%.

Meanwhile, "use cents-off coupons received in the mail or from newspapers/magazines" (23.0%) recaptures the #5 slot it last held in 2013; its measure had dipped to 21.5% in 2014 from 28.6% in 2013.

Survey respondents that stock up most when they find bargains are: four-person households (58.2%); heavy grocery spenders of \$81-\$100 per week (58.2%) and \$101+ (51.8%); shoppers age 25-39 (55.8%); the highest-income households \$165,001+ per year (54.6%); and Asians (52.2%).

Stock up on an item when you find a bargain	49.7%
Look in newspapers for grocery specials	43.0%
Participate in supermarket frequent shopper or savings club programs	29.0%
Buy products on special even if you hadn't planned to buy them that day	27.9%
Use cents-off coupons received in the mail or from newspapers/magazines	23.0%
Buy store brands or lower priced brands instead of national brands	20.8%
Buy only what's on your list	18.5%
Compare grocery prices at different stores	14.1%
Go to stores other than your primary grocery store for advertised specials	12.3%
Use cents-off coupons received in the store, such as off the shelf, at checkout or at a kiosk	7.5%
Online coupons, from a company's social media or website	6.8%
Buy in larger package sizes	4.7%
Use mail-in rebates for cash refunds	0.7%
Online daily deals, such as Groupon	0.3%

17: PURCHASE INFLUENCES



SOCIAL NETWORKING TOOLS

Opportunities for retailers and brands to incentivize purchases and connect with consumers via social media grow with smartphone use. They could target deals to specific consumers, share recipes, nutrition insights and new product details on different platforms.

Soon, a majority of consumers should cite a social media platform they actively use to help choose and buy foods. For now, 52.8% say they don't use social media for this purpose – though this figure descends every year we've measured it, from 57.2% in 2013 to 53.1% in 2014 to today's measure.

Facebook mentions rise to 31.3% from 2014's 29.9%, 2013's 28.0% and 2012's 29.0%. Instagram also moves up to 3.2% from last year's 2.5%. Meanwhile, Pinterest declines to 15.1% from last year's 15.8%, yet is above 2013's 12.5%. Twitter dips to 6.0% from 6.6% last year.

None	52.8%
Facebook	31.3%
Pinterest	15.1%
Other	15.0%
Twitter	6.0%
Instagram	3.2%
YouTube	2.4%

FOOD OR BEVERAGE APPS

App enthusiasm settles down in 2015. More than one-third of consumers (34.4%) say they've downloaded at least one food or beverage app. But this is down from 2014's 36.9%, when app users jumped from 21.0% in 2013, 19.6% in 2012, and 11.0% in 2011. The biggest app users are: high-income households earning \$125,001-\$165,000 (53.1%) and \$165,000+ (50.9%); and consumers age 25-39 (51.4%) and 24 and younger (50.0%).

Yes	34.4%
No	65.6%

18: EATING AND COOKING HABITS



HOW OFTEN DO YOU:

EAT HOME-COOKED MEALS AT HOME?

For the fifth straight year, about nine out of 10 consumers (88.8%) say they prepare dinner in their home kitchens three or more times per week. This figure is slightly below the range of results posted since 2011. Those figures were 90.9% in 2014, 89.7% in 2013, 90.8% in 2012, and 92.0% in 2011.

Never	0.4%
Less than once a MONTH	0.8%
One to three times a MONTH	1.9%
One to two times a WEEK	8.1%
Three or more times a WEEK	88.8%

SERVE MEALS USING LEFTOVERS?

More than three-quarters of consumers (76.4%) include leftovers in meals pretty regularly – either “one to two times a week” (54.5%) or “three or more times a week” (21.9%). Though this incidence is down from last year’s peak level of 79.2%, it shows how throwing out edible food goes against the grain of the nation today.

Never	2.2%
Less than once a MONTH	6.2%
One to three times a MONTH	15.2%
One to two times a WEEK	54.5%
Three or more times a WEEK	21.9%

DINE OUT IN FULL-SERVICE RESTAURANTS?

This is a sign of two Americas. There is the one-quarter of consumers (26.8%) that dine out in full-service restaurants either “one to two times a week” (22.5%) or “three or more times a week” (4.3%). By contrast, three-quarters lack that type of regularity (73.2%): 38.6% do so “one to three times a month,” 30.0% do so “less than once a month,” and 4.6% say “never.” Households that dine out “one to two times a week” are led by the highest annual income groups: \$165,001+ (39.1%) and \$125,001-\$165,000 (35.4%).

Never	4.6%
Less than once a MONTH	30.0%
One to three times a MONTH	38.6%
One to two times a WEEK	22.5%
Three or more times a WEEK	4.3%

18: EATING AND COOKING HABITS



EAT TAKEOUT OR HOME-DELIVERED MEALS?

Consistent with the dining out question directly above, eight out of 10 consumers (79.3%) eat takeout or delivered foods three times monthly at most. This figure stays within the range of recent years – 80.1% in 2014, 80.4% in 2013, 78.5% in 2012, and 83.0% in 2011. Supermarkets could compete vigorously for this business – especially among higher-income groups willing to pay for this convenience – through innovative, quality prepared foods.

Never	9.7%
Less than once a MONTH	34.1%
One to three times a MONTH	35.5%
One to two times a WEEK	17.6%
Three or more times a WEEK	3.1%

EAT AT FAST-FOOD ESTABLISHMENTS?

Nearly two-thirds of consumers (63.8%) say they keep arms-length from these feeders: 24.4% say they “never” go there, and 39.4% “eat there less than once a month.” This collective figure was 63.6% in 2014 (24.9% “never” and 38.7% “less than once a month”). Multiple menu changes to improve food content and taste appeals, and block any veto votes in households, fail to move the needle in their favor.

The “never” responses are driven mostly by: one- and two-person households with less kid influence (about 29.0% on average); shoppers age 25-39 (31.4%) and 24 and younger (31.3%); and high earners \$125,001-\$165,000 (26.0%).

Never	24.4%
Less than once a MONTH	39.4%
One to three times a MONTH	25.6%
One to two times a WEEK	9.0%
Three or more times a WEEK	1.6%

18: EATING AND COOKING HABITS



EAT LOCALLY GROWN FOODS?

For the fourth straight year, consumers say they eat locally grown foods more often than they eat organic foods. Local is a regular habit for nearly three-quarters of the nation; only 26.8% (same as in 2014, less than 27.7% in 2013 and 28.1% in 2012) consume “local” once a month or less. The most committed “local” eaters – once or multiple times a day – comprise 23.8% of survey respondents. This is up from last year’s 22.3%, though still beneath 2013’s 24.2%.

Never	0.8%
Rarely	15.2%
On Special Occasions	3.5%
Once a Month	7.3%
Once Every Other Week	14.3%
Three Times a Week	20.9%
Twice a Week	14.3%
Once a Day	11.3%
Multiple Times During the Day	12.5%

EAT ORGANIC FOODS?

The split widens in 2015 between regular organic food eaters (55.5%) and people who hardly eat them at all (44.5%); the 2014 ratio was 53.4% to 46.6%. We define regularly as between “once every other week” and “multiple times during the day” – and hardly as between “never” and “once a month.”

Cost has been one probable reason for nearly half the nation to shun organic foods. But lower prices for these items at Walmart may be spurring more consumer trial. Also, memories may be fading of 2012 research that claimed organic foods brought no major nutritional benefits over conventional foods. Prior to the release of that research, regular organic eaters peaked at 56.6% in 2012 - the survey now says we’re close to that level again.

Leading the “multiple times a day” response: high-income \$125,001-\$165,000 households (24.0%); heavy grocery spenders \$101+ (20.4%); shoppers age 25-39 (17.1%); and one- and two-person households (about a 17.0% average).

Never	6.9%
Rarely	29.5%
On Special Occasions	4.2%
Once a Month	4.0%
Once Every Other Week	8.5%
Three Times a Week	13.7%
Twice a Week	9.4%
Once a Day	8.7%
Multiple Times During the Day	15.1%

18: EATING AND COOKING HABITS



WHAT KIND OF HOME COOK ARE YOU?

(Does not add up to 100% because of multiple responses.)

Consumers have swagger at the stove – and this opens the door for supermarkets to step them up from simple dishes to more challenging ones that may satisfy them more. This could drive even more confidence in the kitchen and incremental sales.

A record share of consumers who've eaten at home since the recession today say they feel "confident in the kitchen" (57.6%); this is up from last year's 56.4%, 2013's 52.4% and 2012's 56.2%.

Stores that engage shoppers with Web recipes, cooking classes, in-store handouts and dietitians would address the downtrend in the #2 answer, "like to experiment, create own recipes" (37.7%), which fell six points from 2014's 43.7%. With the right guidance, good things could happen.

Confident in the kitchen 57.6%

Like to experiment, create own recipes 37.7%

Follow simple recipes 24.2%

Enthusiastic 23.7%

Cook a few dishes well 21.5%

Follow complex recipes 19.0%

Have the "magic" touch 13.6%

Tentative 3.6%

Novice 3.4%

IS IT IMPORTANT TO YOU TO BECOME A BETTER HOME COOK?

Two-thirds of consumers (67.3%) say "yes" – we believe to enjoy meals more, prepare meals with less stress, impress their loved ones, and derive more value from foods they buy in the supermarket. This figure is lower than last year's 72.1%, 2013's 71.4%, and 2012's 75.4%, but it is still a significant majority. Ethnic groups Hispanics, African-Americans and Asians (83.0% on average) want to achieve this, as do larger households of 4, 5 or more (77.4% on average), consumers up to age 49 (76.5% on average), and grocery spenders of \$101+ per week (70.3%).

Yes 67.3%

No 32.7%

18: EATING AND COOKING HABITS



HAVE YOU BEEN COOKING MORE AT HOME THE PAST TWO YEARS?

As more households – though not nearly all – benefit from the economic recovery, the percentage cooking more at home abates to 42.3%. This figure was 47.4% in 2014, 47.5% in 2013, and 50.9% in 2012 and 2011. Combine this with survey respondents who say they cook “about the same” (44.8%, up from 43.4% in 2014 and 41.9% in 2013) to see the massive market for food stores to court with food and meal prep knowledge, quality products, and innovative recipes.

Yes 42.3%
No 12.9%

About the same 44.8%

The younger the respondent, the more cooking at home – from consumers 24 and younger (87.5%) to 25-39 (57.1%) to seniors 65+ (32.4%). Also, males (73.2%), African-Americans (66.7%) and Hispanics (66.7%) lead this response.

IF YES, HAS THE EXPERIENCE IMPROVED YOUR COOKING SKILLS?

Seven out of 10 survey respondents (70.7%) say they’ve become better cooks because they cook more at home. This is down from 74.4% in 2014, 71.9% in 2013 and 75.3% in 2012, but higher than 2011’s 63.0%. These groups feel they’ve improved the most: African-Americans (90.9%), Hispanics (66.7%), consumers 24 and younger and 25-39 (83.2% on average), males (82.6%), heavy grocery spenders \$81-\$100 per week (75.9%) and \$101+ (73.6%).

Yes 70.7%
No 29.3%

WILL HEALTH REFORMS AFFECT YOUR EATING HABITS?

For the second straight year, less than one respondent in 10 (7.9%) says he or she will eat differently as a result of the Affordable Care Act. Most (61.2%) expect no change. A nominal 1.22% of respondents say their eating might become less disciplined.

Yes 7.9%
No 61.2%
Don’t know 30.8%

19: CONSUMERS BUY A NEW FOOD PRODUCT FOR THE FIRST TIME



HOW OFTEN DO THEY LOOK FOR _____ WHEN DECIDING WHETHER OR NOT TO PURCHASE IT?

PRICE

People don't want to waste food or money, and this extends to trials of new items. Three-quarters of consumers (75.2%) say they "almost always" look at price when deciding to buy or not. After dipping in 2014 to 73.0%, this measure rises nearly to its level in prior surveys - 75.5% in 2013 and 75.8% in 2012; this figure pre-recession was 72.0%. Combine the latest result with "sometimes" (21.6%) to see price is on our minds 96.8% of the time.

Almost Always	75.2%
Sometimes	21.6%
Hardly Ever	3.1%
Never	0.1%

BRAND NAMES

New brands may have a tougher time breaking through customer doubt. A jump of nearly nine points in "almost always" responses shows that trust and brand familiarity matter a lot in new-item purchase decisions. The 46.3% level sets a record for this measure, well above 2014's 37.7%, 2013's 39.2% and 2012's 37.8%. Add in the 45.9% "sometimes" (down from 53.0% last year) to see brand names influence 92.2% of consumers overall.

Almost Always	46.3%
Sometimes	45.9%
Hardly Ever	7.0%
Never	0.8%

HEALTH CLAIMS

Striving to eat healthier, 77.4% of consumers weigh health claims "almost always" or "sometimes" when considering purchase of a new food item. This is down from 80.8% in 2014, 81.2% in 2013 and 84.0% in 2012. If survey respondents felt more confident that health claims are accurate and relate to their needs, this figure would be higher.

Almost Always	36.2%
Sometimes	41.2%
Hardly Ever	17.5%
Never	5.1%

19: CONSUMERS BUY A NEW FOOD PRODUCT FOR THE FIRST TIME



INGREDIENTS

A vast majority of consumers (92.9%) read the contents list of a new food item before buying. This combined figure is the same as last year, though "almost always" (66.5%) dipped from 67.5% in 2014 and "sometimes" (26.3%) rose from 25.4%.

Almost Always	66.5%
Sometimes	26.4%
Hardly Ever	6.2%
Never	0.9%

TYPE OF PRESERVATIVES OR ADDITIVES

More than eight out of 10 consumers (84.1%, a bit below last year's 84.7% and 2013's 84.6%) review this list "almost always/sometimes." The share of survey respondents who do this nearly every time - 54.7% - is in the middle of the range of the past few years. The level was 54.3% in 2014, 54.6% in 2013, 56.2% in 2012, 59.0% in 2011, 51.0% in 2010, and 42.0% in 2009.

Almost Always	54.7%
Sometimes	29.4%
Hardly Ever	11.6%
Never	4.3%

ORGANIC CLAIMS

This measure rises in 2015 to 65.9% of consumers who "almost always/sometimes" review organic claims on new products. In the middle of results of recent years - above 64.3% in 2014 and 65.3% in 2013, but below 68.6% in 2012 and 70.0% in 2011 - this figure reflects ongoing interest by a committed, growing body of U.S. adults. The latest "almost always" component (30.1%) is higher than last year's 28.5% and 2013's 29.6%.

Almost Always	30.1%
Sometimes	35.8%
Hardly Ever	21.9%
Never	12.3%

WHERE THE PRODUCT WAS MADE

Place of origin could be a plus or minus for a new food item, signifying wholesomeness or a potential safety risk. Today, more than eight out of 10 consumers (80.3%) - a record level for this survey - look for where a product was made when assessing a new food product. The "almost always" component (43.2%) is 5.3 points higher than last year's 37.9%, and also tops 2013's 41.4% and 2012's 41.3%.

Almost Always	43.2%
Sometimes	37.1%
Hardly Ever	14.6%
Never	5.1%

20: ANONYMOUS DEMOGRAPHICS



GENDER

Female	73.9%
Male	26.1%

WEEKLY HOURS WORKED

Full Time	56.1%
Retired	25.5%
Part Time	10.2%
Unemployed	6.8%
Student	0.5%
Full Time Work and Student	0.4%
Part Time Work and Student	0.4%

AGE BRACKET

24 and younger	2.2%
25 to 39	14.3%
40 to 49	13.8%
50 to 64	44.5%
65 and older	25.2%

DO YOU THINK OF YOURSELF AS A

Senior	15.5%
Older Boomer	26.9%
Younger Boomer	33.1%
Gen Xer	18.3%
Gen Yer	6.2%

20: ANONYMOUS DEMOGRAPHICS



ETHNICITY

Caucasian	91.1%
Asian	3.1%
Other	2.9%
African American	1.6%
Hispanic	1.2%

REGION OF UNITED STATES OF YOUR PRIMARY RESIDENCE:

East	36.3%
Midwest	24.0%
West	23.1%
South	16.6%

NUMBER OF PEOPLE LIVING AT PRIMARY RESIDENCE

1	22.9%
2	48.0%
3	13.2%
4	9.1%
5 or more	6.7%

NUMBER OF CHILDREN LIVING AT HOME

0	74.0%
1	12.9%
2	7.7%
3	3.4%
4	1.2%
5 or more	0.7%

20: ANONYMOUS DEMOGRAPHICS



AMOUNT SPENT EACH WEEK ON GROCERIES

\$0-\$40	6.0%
\$41-\$60	11.1%
\$61-\$80	15.0%
\$81-\$100	22.5%

\$101 and over 45.4%

AVERAGE HOUSEHOLD INCOME

\$45,000 or less	23.5%
\$45,001 - \$85,000	25.6%
\$85,001 - \$125,000	22.8%
\$125,001 - \$165,000	13.1%
\$165,001 or more	15.0%

20: ANONYMOUS DEMOGRAPHICS



DO YOU HAVE MORE THAN ONE HOME?

No	88.8%
Yes	11.2%

IF YES, PLEASE STATE YOUR COMBINED WEEKLY TOTAL EXPENDITURES IN ALL STORES FOR FOODS AT BOTH LOCATIONS, FOR YOURSELF AND YOUR FAMILY:

Less than \$25	3.6%
\$25-35	1.9%
\$36-45	3.2%
\$46-55	7.1%
\$56-65	4.5%
\$66-75	4.2%
\$76-85	7.4%
\$86-95	3.6%
\$96-105	9.4%
\$106-115	12.9%
\$116-125	7.8%
\$126-135	5.8%
\$136-150	9.4%
\$151-175	6.5%
\$176-200	5.2%
\$201 or more	7.4%



NGA is the national trade association representing the retail and wholesale grocers that comprise the independent sector of the food distribution industry. An independent retailer is a privately owned or controlled food retail company operating a variety of formats. Most independent operators are serviced by wholesale distributors, while others may be partially or fully self-distributing. Some are publicly traded but with controlling shares held by the family and others are employee owned. Independents are the true “entrepreneurs” of the grocery industry and dedicated to their customers, associates, and communities. NGA members include retail and wholesale grocers, state grocers associations, as well as manufacturers and service suppliers. For more information about NGA and the independent sector of the industry, see the NGA website: www.nationalgrocers.org.



SupermarketGuru.com is one of the leading resources for the food industry and consumers. It is focused on food and retailing trends, new product reviews, and health news and is visited by more than 10 million visitors each year. The SupermarketGuru Consumer Panel is an opt-in social network of more than 105,000 shoppers who are surveyed on important and timely topics at least twice per month.

In addition to SupermarketGuru.com, Consumer Insight Inc. also publishes daily The Lempert Report (B2B) and SupermarketGuru Newflash for consumers as well as the monthly e-publications Facts, Figures & the Future and Food, Nutrition & Science. Phil Lempert, editor in chief, is regarded as one of America’s leading consumer trend-watchers and food analysts. He is seen regularly on NBC’s TODAY Show, The View, The Daily Buzz, FOX Business News. He is a columnist for Supermarket News, the Huffington Post and the Chicago Sun-Times.