

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"While food/drink shopping habits exhibit some traditionalism, shifts are clear, largely driven by a quest for lower prices. Many shoppers report shopping at value-oriented stores for groceries more in the past year, suggesting the potential for these channels to grow sales share in the coming years."

- **Beth Bloom, Associate Director - Food & Drink**

This report looks at the following areas:

- The majority of shoppers open to trying new locations
- Low price leads important factors when choosing a purchase location
- Shoppers want it to be easier

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

The majority of shoppers open to trying new locations

Figure 1: Shopping statements – New items/locations, August 2017

Low price leads important factors when choosing a purchase location

Figure 2: Channel drivers, August 2017

Shoppers want it to be easier

Figure 3: Shopping statements – Convenience, August 2017

The opportunities

Brands should capitalize on consumers' engagement with food

Figure 4: Food/drink segmentation – Engagement – Any agree, August 2017

Rapidly growing claims suggest greater consumer interest in ingredient transparency

Figure 5: Fastest growing food and drink claims, 2013 and 2017*

Turning shoppers into advocates

What it means

The Market – What You Need to Know

Sales of food for at-home consumption outpace sales for away-from-home

Gap widens between supermarkets and "other channels"

Women make up a slightly larger share of grocery shoppers

Retailer choice may shift due to health initiatives

Whole Foods acquisition causes retailers to rethink strategies

Market Breakdown

Gap widens between supermarkets and "other channels"

Figure 6: Percentage of total MULO grocery sales (food and nonfood), by segment, at current prices, 2012-22

Competitive landscape sees even more entrants

62% of US adults have shopped for food at Walmart in the past month

Figure 7: Select food stores and supermarkets shopped in the past four weeks, spring 2017

Market Perspective

Sales of food for at-home consumption outpace sales for away-from-home

Figure 8: Share of food expenditures for food at home and food away from home, 2007-17

Whole Foods acquisition causes retailers to rethink strategies

Figure 9: Walmart "New! Hand-crafted in Italy. Sam's Choice Italia is here." email, October 2017

Market Factors

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brands should capitalize on consumers' engagement with food

Figure 10: Food/drink segmentation – Engagement – Any agree, August 2017

Figure 11: Whole Foods Market "Reserve Your Feast Today: 3 Weeks 'Til Thanksgiving!" email, November 2017

Women make up a slightly larger share of grocery shoppers

Figure 12: Share of grocery shopping responsibility, by gender, August 2017

In their words: Who's involved?

Increasing diversity broadens American palate/shopping cart

Figure 13: "Many Chairs. One Table." YouTube ad, August 2017

Figure 14: Population by race and Hispanic origin, 2012-22

Retailer choice may shift as Americans attempt to eat healthier

Consumer confidence should rise as unemployment falls

Figure 15: Consumer confidence and unemployment, 2000-September 2017

Key Players – What You Need to Know

Kosher and low/no/reduced allergens lead 2017 food/drink claims

Rapidly growing claims suggest increasing consumer interest in ingredient transparency

All-natural claim losing share, as are callouts related to weight loss

What's Working?

Popular food and drink claims

Kosher and low/no/reduced allergens lead 2017 food/drink claims

Figure 16: Leading food and drink claims, 2013 and 2017*

Rapidly growing claims suggest increasing consumer interest in ingredient transparency

Figure 17: Fastest growing food and drink claims, 2013 and 2017*

What's Struggling?

All-natural claim losing share, as are callouts related to weight loss

Low price should create distance from an association with low value

Don't tell me to diet

Figure 18: Fastest declining food and drink claims, 2013 and 2017*

What's Next?

Prioritizing speed

Boosting convenience through consolidating efforts

Meal kits represent challenge and opportunity

Turning shoppers into advocates

In their words: Spreading the word

Figure 19: Save-A-Lot food stores "We're saying thanks with a WEEKEND SALE!" email, October 2017

The Consumer – What You Need to Know

Health leads as an important factor in food choices

Supermarkets lead as food and drink purchase outlet of choice

The weekly supermarket trip still leads

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Low price leads important factors in choosing a purchase location

The majority of shoppers open to trying new locations

Consumers want food and drink shopping to be easy

What Influences Consumer Food Choices?

Health leads as an important factor in food choices

Figure 20: Food/drink segmentation – Food choices – Any agree, August 2017

Environmental responsibility is important to younger shoppers

Figure 21: Food/drink segmentation – Food choices – Any agree, by age, August 2017

Higher earners are more likely to prioritize health

Figure 22: Food/drink segmentation – Food choices – Any agree, by HH income, August 2017

City dwellers are more interested in health, environment

Figure 23: Food/drink segmentation – Food choices – Any agree, by region, August 2017

Parents are especially engaged in food factors

Figure 24: Food/drink segmentation – Food choices – Any agree, by parental status, August 2017

New product trial

Introduction to new products largely happens while shopping

In their words: What/who influences new food/drink trial

Food and Drink Shopping Channel Preference

Supermarkets lead as food and drink purchase outlet of choice

Figure 25: Primary shopping channels, August 2017

Figure 26: "How to Lidl – Price" TV ad, May 2017

Figure 27: ALDI "Start November with savings!" email, November 2017

Figure 28: Instacart "Reserve Your Feast Today: 3 Weeks "Get \$20 off today! Shop and save with ALDI."" email, November 2017

In their words: Online food/drink shopping has a strong association with time savings

Women seek cost savings and health

Figure 29: Select food stores and supermarkets shopped in the past four weeks, by gender, spring 2017

18-24s are more likely to shop at Walmart than at traditional supermarkets

Figure 30: Primary shopping channels, by age, August 2017

Supermarkets may appear as an expensive option

Figure 31: Primary shopping channels, by HH income, August 2017

59% of Aldi shoppers come from HHs earning less than \$75K

Figure 32: "Name That Chewn | Rice Cakes" YouTube ad, October 2017

Figure 33: "I Like ALDI Commercial | Mac & Cheese" YouTube ad, September 2017

Figure 34: Select food stores and supermarkets shopped in the past four weeks, by HH income, spring 2017

Supermarkets do well in the suburbs, mass merchandisers have rural appeal

Figure 35: Primary shopping channels, by city size, August 2017

Supermarkets work for smaller households, mass appeals to larger ones

Figure 36: Primary shopping channels, by HH size, August 2017

Figure 37: "Target Run 2017 Milk :15" TV ad, June 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 38: Select food stores and supermarkets shopped in the past four weeks, by HH size, spring 2017

In their words: Mass outlets may do well to highlight benefits beyond price

In their words: Ideal food and drink shopping location

Food and Drink Purchase Frequency

The weekly supermarket trip still leads

Figure 39: Purchase frequency, by channel, August 2017

Men are more likely to shop frequently

In their words: Shopping frequency

Figure 40: Purchase frequency – Any channel, by gender, August 2017

25-34s are most frequent shoppers

Figure 41: Purchase frequency – Any channel, by age, August 2017

18% of shoppers in urban locations shop daily for food and drink

Figure 42: Purchase frequency – Any channel, by city size, August 2017

Choosing a Food and Drink Shopping Location

Low price leads important factors in choosing a purchase location

Figure 43: Channel drivers, August 2017

Women are most likely to be price conscious, while men gravitate toward convenience

Figure 44: Share of channel drivers – Any importance, by gender, August 2017

Figure 45: Whole Foods Market “Reserve Your Feast Today: 3 Weeks ‘Til Thanksgiving!” email, November 2017

Fresh products appeal to older shoppers

Figure 46: Channel drivers – Any importance, by age, August 2017

Rural shoppers like low prices; city dwellers want health and ease

Figure 47: Channel drivers, by city size, August 2017

Motivations to switch channels

Lower prices can help sway shoppers; fresh products could also appeal

Figure 48: Motivation to switch channels, August 2017

Food and Drink Shopping Statements

New items/locations

The majority of shoppers are open to trying new locations

Figure 49: Shopping statements – New items/locations, August 2017

Figure 50: “Puerto Rico Relief Fund: “United”” TV ad, October 2017

Under 45s are most interested in new products/locations

Figure 51: Shopping statements – New items/locations, by age, August 2017

Rural shoppers may be resigned to limited options

Figure 52: Shopping statements – New items/locations, by city size, August 2017

Convenience

Shoppers want it to be easier

Figure 53: Shopping statements – Convenience, August 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Younger shoppers want to spend less time thinking about food

Figure 54: Shopping statements – Convenience, by age, August 2017

Figure 55: Kellogg's "Happy Birthday from Kellogg's" email, November 2017

Hispanics prefer frequent, small trips

Figure 56: Shopping statements – Convenience, by Hispanic origin, August 2017

Respondents from large HHs feel like they spend too much time on meal planning

Figure 57: "ClickList Delivery "Dog Wash" | Commercial | Kroger" commercial, July 2017

Figure 58: Shopping statements – Convenience, by HH size, August 2017

Cluster Analysis

Figure 59: Food and drink shopper clusters, August 2017

Group 1: Traditionalists

Demographics:

Characteristics

Opportunities

Figure 60: Primary shopping channels, by food/drink shopper clusters, August 2017

Group 2: Enthusiasts

Demographics:

Characteristics

Opportunities

Figure 61: Shopping statements, by food/drink shopper clusters, August 2017

Group 3: Just Feed Mes

Demographics:

Characteristics

Opportunities

Figure 62: Channel drivers, by food/drink shopper clusters, August 2017

Group 4: Ease Seekers

Demographics:

Characteristics

Opportunities

Group 5: Quality Seekers

Demographics:

Characteristics

Opportunities

Figure 63: Motivation to switch channels, by food/drink shopper clusters, August 2017

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Food and Drink Shopper - US - November 2017

Report Price: £3008.96 | \$3995.00 | €3429.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Abbreviations

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com