

# Understanding Consumer Barriers to Buying Fresh Food Online - US - October 2019

Report Price: £3695 | \$4995 | €4400

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

## This report looks at the following areas:

- Most fresh food purchases still made in-store
- Saving time a primary motivation for buying fresh foods online
- Shoppers prefer in-store fresh food selection



Even as grocery ecommerce grows, online purchase incidence remains low in most major fresh food categories. However, overcoming barriers to buying fresh foods online may represent the key to keeping online grocery sales overall on a growth track. The biggest challenge may be shoppers' generally positive view of shopping for fresh foods in-store.

**- John Owen, Associate Director Food & Retail**

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

## Table of Contents

### OVERVIEW

- What you need to know
- Definition

### EXECUTIVE SUMMARY

- **Key takeaways**
- **The issues**
- **Most fresh food purchases still made in-store**  
Figure 1: Major fresh categories online vs in-store, August 2019
- **Saving time a primary motivation for buying fresh foods online**  
Figure 2: Reasons for purchasing fresh foods online, August 2019
- **Shoppers prefer in-store fresh food selection**  
Figure 3: Reasons for not purchasing fresh foods online, August 2019
- **The opportunities**
- **Raising expectations of fresh foods could help drive online shopping frequency**  
Figure 4: Reasons for selecting most-often online retailer, by online grocery shopping frequency, August 2019
- **Stress fresh-food quality standards to win with older shoppers**  
Figure 5: Interest in fresh food online shopping concepts – Quality, by age, August 2019
- **Appeal to younger shoppers with convenience and help**  
Figure 6: Interest in fresh food online shopping concepts – Convenience and help, by age, August 2019

### THE MARKET – WHAT YOU NEED TO KNOW

- **Online grocery sales still small but growing fast**
- **Steady, modest growth for the perimeter amid increased competition**
- **Millennials take on more grocery shopping responsibility**

### MARKET PERSPECTIVE

- **Online grocery small compared to other categories but growing fast**  
Figure 7: Total US online sales of groceries\*, at current prices, 2014-19 (est)
- **Online food and beverages have momentum and room to grow**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Report Price: £3695 | \$4995 | €4400

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

Figure 8: Total US online sales of groceries, by segment, at current prices, 2014-19 (est)

- **Steady, modest growth for the perimeter amid increased competition**

Figure 9: Total US sales and fan chart forecast of perimeter-of-store foods, at current prices, 2014-22

## MARKET FACTORS

- **Broader ecommerce trends impact grocery sector**
- **Millennials take on more grocery shopping responsibility**
- **Households with children on the decline**
- **Most consumers report making an effort to eat healthy**

Figure 10: Approaches to healthy eating, May 2018

- **Young adults far more likely to see barriers to healthy eating**

Figure 11: Barriers to healthy eating, by gender and age, May 2018

## KEY PLAYERS – WHAT YOU NEED TO KNOW

- **Developments along the last mile of home delivery**
- **A new model blends meal kits and grocery**
- **Leveraging content to drive online fresh food sales**

## WHAT'S HAPPENING?

- **Fresh developments in home grocery delivery**
- **Amazon continues to push Prime members towards Whole Foods**
- **Instacart offers easy path to home delivery**
- **Autonomous vehicles keep moving**
- **A fresh food store on wheels**
- **Walmart's in-home delivery expands**

## WHAT TO WATCH

- **Hungryroot offers a hybrid of meal kits and grocery**
- **Blending content and commerce for a more engaging online shopping experience**

## THE CONSUMER – WHAT YOU NEED TO KNOW

- **Incidence of online grocery shopping on the rise**
- **Few fresh food purchases made online**
- **In spite of satisfaction with ordering online, shoppers still prefer store**
- **Saving time a primary motivation for buying fresh foods online**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

- Shoppers prefer to select fresh foods in-store
- Walmart tops Amazon in online fresh food purchase incidence
- Fresh food quality a potential key point of difference
- In-store preferred by far over online for fresh food shopping
- Online shoppers want to inspect fresh items before buying
- Generally positive perceptions among online fresh food purchasers

## GROCERY SHOPPING METHOD

- **More grocery shoppers shop online at least occasionally**  
Figure 12: Shopping method, August 2019
- **Online grocery shopping age gap widens**  
Figure 13: Shopping method, by age, August 2019
- **Online grocery offers convenience to busy parents**  
Figure 14: Shopping method, by parental status, August 2019
- **Hispanic grocery shoppers visit a variety of channels, including online**  
Figure 15: Shopping method, by race/Hispanic origin, August 2019

## MAJOR FRESH CATEGORIES – ONLINE VS IN-STORE

- **Most fresh food purchases still made in-store**  
Figure 16: Major fresh categories online vs in-store, August 2019
- **Many frequent online grocery shoppers look to stores for fresh foods**  
Figure 17: Major fresh categories online vs in-store – Fresh meat or poultry, by frequency of online grocery shopping, August 2019  
Figure 18: Major fresh categories online vs in-store – Fresh fish or seafood, by frequency of online grocery shopping, August 2019  
Figure 19: Major fresh categories online vs in-store – Fresh vegetables, by frequency of online grocery shopping, August 2019

## SATISFACTION WITH SHOPPING ONLINE FOR FRESH ITEMS

- **Most online fresh food purchasers are satisfied, but still prefer store**  
Figure 20: Satisfaction with shopping online for fresh items, August 2019

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit	store.mintel.com
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

Report Price: £3695 | \$4995 | €4400

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

## REASONS FOR PURCHASING FRESH FOODS ONLINE

- **Saving time a primary motivation for buying fresh foods online**

Figure 21: Reasons for purchasing fresh foods online, August 2019

- **Quality fresh foods may motivate more online shopping**

Figure 22: Reasons for purchasing fresh foods online, by online grocery shopping frequency, August 2019

## REASONS FOR NOT PURCHASING FRESH FOODS ONLINE

- **Shoppers prefer in-store fresh food selection**

Figure 23: Reasons for not purchasing fresh foods online, August 2019

- **Younger shoppers more open to letting the retailer do the selecting**

Figure 24: Reasons for not purchasing fresh foods online, by age, August 2019

## RETAILERS FOR ONLINE FRESH FOOD PURCHASE

- **Walmart tops Amazon in online fresh food customers**

Figure 25: Retailers for online fresh food purchase, August 2019

- **Young shoppers make online fresh purchases across a wider array of retailers**

Figure 26: Retailers for online fresh food purchase, by age, August 2019

## REASONS FOR SELECTING MOST-OFTEN ONLINE RETAILER

- **Online fresh food shoppers look first for convenience**
- **Opportunity to leverage fresh food quality as point of difference**

Figure 27: Reasons for selecting most-often online retailer, August 2019

- **More frequent online shoppers have higher expectations of fresh foods**

Figure 28: Reasons for selecting most-often online retailer, by online grocery shopping frequency, August 2019

## PREFERRED FRESH SHOPPING METHOD BY TRIP TYPE

- **In-store preferred by far over online for fresh food shopping**

Figure 29: Preferred fresh shopping method by trip type, August 2019

- **Light online shoppers still prefer in-store for fresh foods**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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

Figure 30: Preferred fresh shopping method by trip type among consumers who purchase most of their groceries in-store but some online, August 2019

- **Heaviest online shoppers prefer online to in-store by small margin**

Figure 31: Preferred fresh shopping method by trip type among consumers who purchase half or more of their groceries online, August 2019

## INTEREST IN FRESH FOOD ONLINE SHOPPING CONCEPTS

- **Online shoppers want to inspect fresh items before buying**
- **Convenience-oriented concepts also hold appeal**

Figure 32: Interest in fresh food online shopping concepts, August 2019

- **Older shoppers concerned about quality as younger shoppers look for convenience**

Figure 33: Interest in fresh food online shopping concepts, by age, August 2019

- **Frequent online shoppers less concerned about fresh food quality, selection**

Figure 34: Interest in fresh food online shopping concepts, by online grocery shopping frequency, August 2019

## ATTITUDES TOWARD SHOPPING FOR FRESH FOODS ONLINE

- **Generally positive perceptions among online fresh food purchasers**

- **Lack of impulse online**

Figure 35: Attitudes toward shopping for fresh foods online, August 2019

- **Younger shoppers are a challenge and opportunity for online retailers**

Figure 36: Attitudes toward shopping for fresh foods online, by age, August 2019

- **Frequent online shoppers more satisfied with convenience and selection**

Figure 37: Attitudes toward shopping for fresh foods online, by online grocery shopping frequency, August 2019

## APPENDIX – DATA SOURCES AND ABBREVIATIONS

- **Data sources**
- **Consumer survey data**
- **Abbreviations and terms**
- **Abbreviations**
- **Terms**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

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



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.