Food Retail Implications for U.S. Grocery Shopper Trends
July 18, 2017
2pm ET

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• It is FMI’s policy to comply in all respects with the antitrust laws.

• All participants in FMI meetings and events are expected to comply with applicable antitrust and competition laws.

• Avoid discussions of sensitive topics that can create antitrust concerns.
  o Agreements to fix prices, allocate markets, engage in product boycotts and to refuse to deal with third parties are illegal.
  o Discussions of prices (including elements of prices such as allowances and credit terms), quality ratings of suppliers, and discussions that may cause a competitor to cease purchasing from a particular supplier, or selling to a particular customer, should be avoided.
  o No discussion that might be interpreted as a dividing up of territories.

• It is important to avoid even the appearance of unlawful activity.

• Questions or concerns? Please consult with FMI staff.
MEET YOUR PRESENTERS

Sue Borra
Chief Health & Wellness Officer

Hilary Thesmar
Chief Food & Product Safety Officer

David Fikes
VP, Communications & Consumer/Community Affairs
RESEARCH BACKGROUND

For more than four decades, FMI has been tracking the trends of grocery shoppers in the U.S., taking note of where they shop, how they shop and what issues are most important to them as food shoppers. For the past three years, FMI has partnered with the Hartman Group to conduct this research.

**METHODOLOGY:**

**Quantitative Research**

- A 25-minute survey fielded online February 6-14, 2017 to 2,145 U.S. shoppers aged 18 and older. The sample was split to cover a wider range of topics, with each sub-sample having n>1,000.

- Shoppers surveyed are responsible for at least 50% or more of the grocery shopping in their household.


**Qualitative Research**

- In-depth one-on-one 3-hour interviews with 9 consumers from 4 multi-person households and 1 single-person household in the Atlanta area October 26-27, 2016.

- Five in-depth one-on-one virtual interviews with 5 shoppers across the nation. These interviews were augmented with homework and images provided by the consumer.

- 2013-2016 Hartman Group ethnographic research into cooking, eating and shopping.
OVERVIEW OF 2017 FINDINGS

2016

▪ Channel fragmentation in food retail challenges stores to attract and keep shoppers by meeting their evolving needs

▪ Greater numbers of adults share in shopping not only because they need to but also because they want to

▪ Retailers are key allies in shoppers’ overall wellness

2017

▪ Channel fragmentation continues, with ecommerce gaining users

▪ Transparency means context beyond the package

▪ Food retailers are increasingly well positioned for shopper wellness
WHAT WE PLAN TO COVER

1. State of the Marketplace

2. Shopper Values and Trends: Food Safety

3. Shopper Values and Trends: Health & Wellness /Family Meals

4. Foretaste of things to come: Transparency Expectations
State of the Marketplace
GROCERY SHOPPING REMAINS A NATIONAL PASTTIME

Currently in the U.S.

84% of all U.S. Adults say they have at least 50% of the household responsibility for grocery shopping (Compared to 83% in 2015)

“He does more of the shopping now. It used to be that he did most of the cooking when I did the shopping, but now our roles have kind of flipped now that we’re eating healthier.”

—Tanya, 45
CO-SHOPPING IS CONSISTENT, MALE SHOPPING CONTINUES TO GROW

**World of Shoppers**

**Single-person Households**
- **Self Shopper**
  - All shopping: 45% (♂) vs. 55% (♀)
  - vs. 2016: 48% (♂) vs. 52% (♀)

**Multi-person Households**
- **Primary Shopper**
  - Majority of shopping: 39% (♂) vs. 61% (♀)
  - vs. 2016: 31% (♂) vs. 69% (♀)
- **Secondary Shopper**
  - Minority of shopping: 66% (♂) vs. 34% (♀)
  - vs. 2016: 73% (♂) vs. 27% (♀)
- **Shared Shopper**
  - Equal shopping: 48% (♂) vs. 52% (♀)
  - vs. 2016: 59% (♂) vs. 41% (♀)

WEEKLY TRIPS REMAINED FLAT

Average weekly shopping trips to grocery store

- Shoppers who do all or most shopping trips per week: 1.6
- Shoppers who share at least 50% shopping trips per week: 1.5

WEEKLY SPEND INCREASED

Weekly spending on "grocery-type" items (FMI early estimate of prior calendar year)

Weekly spending on key grocery categories (US BLS CEX estimates for calendar year shown)
SHOPPING AROUND CONTINUES

shifting primary loyalty to less traditional formats or not claiming a primary store

• Traditional grocery stores have continued a slow and steady decline as a primary store for shoppers.

• Shoppers with No Primary Store continue to shop multiple channels, distributing their grocery dollars across at least 3 channels each month.

• Shoppers report increasingly frequent visits to not only Natural + Organic stores but also non-traditional grocery outlets, such as Limited Assortment, Convenience, Ethnic and Online-only retailers.

Channel of Primary Store

<table>
<thead>
<tr>
<th>Channel of Primary Store</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>67%</td>
<td>56%</td>
<td>52%</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Supercenter</td>
<td>22%</td>
<td>23%</td>
<td>25%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Warehouse</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Discount</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Limited Assortment</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Organic/specialty</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Other channels**</td>
<td>&lt;1%</td>
<td>&lt;1%</td>
<td>&lt;1%</td>
<td>&lt;1%</td>
<td></td>
</tr>
<tr>
<td>No Primary Store</td>
<td>9%</td>
<td>7%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Channel shopping frequency

<table>
<thead>
<tr>
<th>Fairly Often/Almost Always visit</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular full-service supermarket</td>
<td>85%</td>
<td>83%</td>
</tr>
<tr>
<td>Supercenter</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Conventional discount store</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>Warehouse Club store</td>
<td>29%</td>
<td>31%</td>
</tr>
<tr>
<td>Limited Assortment</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Dollar store</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Drug store</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Natural + Organic store</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Convenience store</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Ethnic food store</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Online-only food store</td>
<td>5%</td>
<td>11%</td>
</tr>
</tbody>
</table>
DRAMATIC ONLINE-ONLY RETAILER GROWTH DRIVEN BY MILLENNIALS

Today, **1 in 4** shoppers is using **online-only retailers**, an increase of more than **50%** in 2 years

... nearly **half of Millennials** are shopping online-only retailers, **almost 80% higher than just 2 years ago**

**Millennials continue to select a narrow range of products to purchase online**

**LESS LIKELY TO BUY ONLINE**
- Non-prescription drugs
- Fresh bakery items
- Fresh meats and seafood
- Refrigerated dairy foods
- Fresh produce

**MORE LIKELY TO BUY ONLINE**
- Baby food
- Pet food or treats
- HH cleaning products
- Salty snacks
- Sweets
DRAMATIC ONLINE-ONLY RETAILER GROWTH DRIVEN BY MILLENNIALS

Frequency of shopping Online-only retailers

-偶尔：20%
-相当频繁：28%
-几乎每次都：43%

总和：16%

2015     2016     2017

Millennials (18-38)  Gen X (39-52)  Boomers (53-71)  Mature (72+)


Occasionally
Fairly often
Almost every time

2015: 16%  2016: 25%  2017: 24%
2015: 43%  2016: 28%  2017: 22%
2015: 17%  2016: 22%  2017: 24%
2015: 16%  2016: 12%  2017: 12%
2015: 5%  2016: 10%  2017: 9%

Total Millennials (18-38): 16% 25% 24%
Total Gen X (39-52): 43% 28% 22%
Total Boomers (53-71): 17% 22% 24%
Total Mature (72+): 12% 10% 9%

2015 2016 2017

The Voice of Food Retail
Shopper Trends and Values: Food Safety
While consumers trust retailers to provide safe food, they are **increasingly reliant on government institutions to ensure food is safe** before it reaches store shelves.

Who Consumers Rely on to Ensure What Is Bought at Grocery Is Safe

- **Myself as an individual**
- **Governmental institutions**
- **Food stores**
- **Manufacturers/Food processors**
- **Farmers**
- **Consumer groups**
- **FDA**
- **USDA**

<table>
<thead>
<tr>
<th>Year</th>
<th>Myself as an individual</th>
<th>Governmental institutions</th>
<th>Food stores</th>
<th>Manufacturers/Food processors</th>
<th>Farmers</th>
<th>Consumer groups</th>
<th>FDA</th>
<th>USDA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>55%</td>
<td>32%</td>
<td>8%</td>
<td>12%</td>
<td>25%</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>2010</td>
<td>51%</td>
<td>29%</td>
<td>10%</td>
<td>10%</td>
<td>27%</td>
<td>17%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>2011</td>
<td>58%</td>
<td>35%</td>
<td>9%</td>
<td>15%</td>
<td>28%</td>
<td>19%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>2012</td>
<td>58%</td>
<td>32%</td>
<td>12%</td>
<td>19%</td>
<td>30%</td>
<td>18%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>2013</td>
<td>58%</td>
<td>38%</td>
<td>15%</td>
<td>19%</td>
<td>32%</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>2014</td>
<td>63%</td>
<td>43%</td>
<td>19%</td>
<td>23%</td>
<td>36%</td>
<td>16%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>2015</td>
<td>64%</td>
<td>41%</td>
<td>21%</td>
<td>23%</td>
<td>38%</td>
<td>17%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>2016</td>
<td>61%</td>
<td>42%</td>
<td>23%</td>
<td>21%</td>
<td>40%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>2017</td>
<td>57%</td>
<td>51%</td>
<td>28%</td>
<td>39%</td>
<td>51%</td>
<td>23%</td>
<td>23%</td>
<td>17%</td>
</tr>
</tbody>
</table>
Shoppers are concerned with risks associated with food mishandling or malice

Food conditions shoppers believe pose some/serious health risk

- Contamination by bacteria or germs: 74%
- Residues, such as pesticides and herbicides: 68%
- Product tampering: 62%
- Terrorists tampering with the food supply: 57%
- Antibiotics and hormones used on poultry or livestock: 56%
- Food from China: 51%
- Foods produced by biotechnology or genetically modified organisms: 45%
- Irradiated foods: 44%
- Food handling in supermarkets: 41%
- Eating food past the 'use by' date: 39%
- Eating food past the 'best by' date: 34%
- Eating food past the 'sell by' date: 32%

87% of shoppers are mostly or "completely CONFIDENT the food in [their] grocery store is SAFE" (Vs. 86% in 2015)
Shoppers overwhelmingly agree that the most likely location for food safety problems to occur is at the factory.

**Chart 3.1: Where Shoppers Believe Food Safety Problems Most Likely to Occur Along the Food Supply Chain**

- **5%** Farm
- **49%** Food processing/manufacturing plants
- **9%** Stored at warehouse
- **5%** Transport
- **10%** Restaurant
- **7%** Home
- **11%** Not sure

Source: FMI U.S. Shopper Trends, 2017. Q: “Where do you think food-safety problems are most likely to occur? (Please select one)” Shoppers n=1,061. (See Appendix: Table A.51)
Shoppers believe restaurants carry a greater risk of food safety problems than grocery stores. However, Millennials are less confident in grocery stores than older generations.

“How CONFIDENT are you that the food is safe?”

Grocery vs. Restaurant Food

- Grocery store
- Restaurant

- 2005: 85%
- 2010: 66%
- 2015: 84%
- 2017: 87%

- 2005: 43%
- 2010: 68%
- 2015: 72%
- 2017: 76%
Two-thirds of consumers follow up on food recalls by checking their food supplies at home.

**Actions shoppers take when learning about a recall**

- I check my current food supplies to make sure I don't have the recalled product: 67%
- I rely on my supermarket to ensure the food I purchase is safe: 27%
- I check with my grocery store to find out if they have pulled the recalled product: 22%
- I never purchase the product again: 13%
- I typically don't do anything when I hear about food recalls: 13%
In the past year, 15% of shoppers say they have stopped purchasing certain products because of safety concerns.

- Some of these concerns are related to specific recalls, while others stem from a concern about the methods used in producing food.
- Non-organic meats pose risks of ingesting chemicals, hormones or antibiotics.
- Meats and seafood imported from outside the U.S. concern shoppers due to the lack of transparency in how animals are raised, treated and processed.
- Other boycotts seem to be related to sustainability or animal welfare – such as canned tuna and chicken.
What are shoppers currently doing about GMOs?

While one out of every 4 shoppers is seeking non-GMO products, an additional 18% are also trying to avoid or minimize GMOs in the products they purchase.

- **Currently seek non-GMO**
  - 23%
  - vs. 26% in 2015

- **Do not currently seek non-GMO**
  - 77%

- **Trying to avoid/minimize GMOs**
  - 23%
  - 18%
  - 59%
  - 41%
  - vs. 45% in 2015
For some shoppers, avoiding GMOs is about personal health, while others just want *transparency* in the foods they eat.
Local, as a cue for transparency, helps fulfill consumer desire to know what is in the food they eat.

I purchase locally grown products...

- **6% Never**
- **80% Occasionally**
- **14% Always**

When locally grown products are purchased, it’s usually due to consumer desire for...

- **Freshness or in season**: 72%
- **Support the local economy**: 65%
- **Taste**: 54%
- **Like knowing the source of the product or how it is grown or produced**: 40%
- **Price**: 34%
- **Nutritional value**: 33%
- **Environment impact of transporting foods across great distances**: 27%
- **Appearance**: 26%
- **Long term personal health effects**: 14%

Source: FMI U.S. Grocery Shopper Trends, 2017. B101: “Which of these best describes how often you purchase locally grown products?” Shoppers n=1,084. B104: “Which of the following are reasons you buy locally grown foods in your grocery store? (Select all that apply).” Among shoppers who purchase locally grown products, n=1,018.
However, some shoppers feel they’re not getting enough information on product packaging alone, particularly when it comes to production.

Product claims where shoppers would like more information

- **Ethical Practices**: 44%
- **Minimal Processing**: 43%
- **Heart Healthy**: 31%
- **Positive Nutrition**: 31%
- **Avoiding Negatives**: 30%
- **Good Fiber**: 20%

Specific product claims shoppers want to know about

- **Ethical Practices**
  - Fair trade: 44%
  - Certified humane: 43%
  - Cage-free: 39%
  - Free-range: 38%
  - Grass-fed: 28%

- **Minimal Processing**
  - Natural: 41%
  - Certified organic: 40%
  - Non-GMO: 37%
  - No artificial ingredients: 34%
  - Gluten-free: 30%
  - No preservatives: 27%
  - No trans fats: 23%
  - No HFCS: 19%

Source: FMI U.S. Grocery Shopper Trends, 2017. A12a: “Which of these would you like a store to provide more information beyond what is printed on the packaging? (Select all that apply).” Shoppers n=varies (237-686). Note: individual product claims rolled up into overarching groupings for analysis.
03 Shopper Trends and Values: Health & Wellness
Shopper concern about the nutritional content of their food

Total Concern:

<table>
<thead>
<tr>
<th>Year</th>
<th>Somewhat Concerned</th>
<th>Very Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>35%</td>
<td>47%</td>
</tr>
<tr>
<td>2015</td>
<td>33%</td>
<td>50%</td>
</tr>
<tr>
<td>2016</td>
<td>34%</td>
<td>48%</td>
</tr>
<tr>
<td>2017</td>
<td>29%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Q. How concerned are you about the nutrition content of the food you eat?
### Consumers Top Concerns Regarding Nutritional Content of Foods

<table>
<thead>
<tr>
<th>Why concerned about nutritional content of food?</th>
<th>2016</th>
<th>2017</th>
<th>difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm concerned about my health in general</td>
<td>61%</td>
<td>54%</td>
<td>$\downarrow$7 pts.</td>
</tr>
<tr>
<td>Some of the food I eat has too much of something I need to avoid</td>
<td>44%</td>
<td>41%</td>
<td>$\uparrow$3 pts.</td>
</tr>
<tr>
<td>The foods I eat aren't nutritious enough in general</td>
<td>22%</td>
<td>24%</td>
<td>$\uparrow$2 pts.</td>
</tr>
<tr>
<td>I'm not getting enough of special nutrients I need</td>
<td>19%</td>
<td>22%</td>
<td>3 pts.</td>
</tr>
<tr>
<td>I have a specific health concern that affects my food choices</td>
<td>18%</td>
<td>18%</td>
<td>0 pts.</td>
</tr>
</tbody>
</table>
Product claims shoppers seek when purchasing a food product

- Low sugar: 33%
- Low sodium: 32%
- No added hormones*: 25%
- Low calorie: 21%
- No/Low fat: 21%
- Low carb: 16%
- No allergens*: 7%
- No artificial ingredients: 30%
- No trans fats: 28%
- No preservatives: 28%
- Natural: 24%
- Non-GMO: 23%
- No HFCS: 19%
- Certified organic: 16%
- Gluten-free: 7%
- Whole grain: 30%
- High fiber: 28%
- Free-range*: 13%
- Grass-fed*: 12%
- Cage-free*: 12%
- Certified humane*: 9%
- Fair trade*: 8%
- Vitamin-enriched: 14%
- Antioxidant-rich: 12%
- Calcium-fortified: 10%
- Low/Lowers cholesterol: 16%
- Heart healthy: 13%

Shoppers prioritize the perimeter as “Fresh, less processed” trend continues – seeking cues for minimal processing and avoiding negative ingredients.

65% Avoid Negatives
59% Minimal Processing
41% Good Fiber
25% Ethical Practices
25% Positive Nutrition
23% Heart Health
Consumers continue to see their primary store as an ally in their wellness

When it comes to helping you stay healthy, which of these groups tend to be on your side and which tend to be working against you?

<table>
<thead>
<tr>
<th>Group</th>
<th>Working against me</th>
<th>Working for me</th>
</tr>
</thead>
<tbody>
<tr>
<td>My family</td>
<td>6%</td>
<td>70%</td>
</tr>
<tr>
<td>Doctors</td>
<td>5%</td>
<td>64%</td>
</tr>
<tr>
<td>My friends</td>
<td>6%</td>
<td>61%</td>
</tr>
<tr>
<td>Farmers</td>
<td>5%</td>
<td>53%</td>
</tr>
<tr>
<td>Fitness/health clubs</td>
<td>6%</td>
<td>48%</td>
</tr>
<tr>
<td>My “primary” food store</td>
<td>6%</td>
<td>45%</td>
</tr>
<tr>
<td>Health insurance companies</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>Food stores in general</td>
<td>9%</td>
<td>33%</td>
</tr>
<tr>
<td>Drug stores</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>Local restaurants</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>The news media</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Food manufacturers</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Celebrity chefs</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Government institutions</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>The entertainment industry</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Fast food restaurants</td>
<td>47%</td>
<td>15%</td>
</tr>
</tbody>
</table>
While slightly fewer shoppers say they are concerned about their health, the majority are still concerned they aren’t getting enough good nutrition.

88% of shoppers believe eating AT HOME is HEALTHIER than eating at a restaurant.

72% are concerned they’re NOT GETTING ENOUGH GOOD NUTRITION from the foods they eat at home.
Dinner dominates as the meal that households are most likely to eat together.

**Chart 3.17: Average Weekly Meals at Home with Family vs. Total Meals, by Household Type**

- **Multi-person HH, no kids**
  - Breakfast: 2.0 meals, 5.8 eaten with family at home, 3.2 eaten without family or not at home
  - Lunch: 1.6 meals, 5.9 eaten with family at home, 4.1 eaten without family or not at home
  - Dinner: 4.0 meals, 6.6 eaten with family at home, 2.4 eaten without family or not at home
  - Total meals together at home each week: 7.6 meals

- **Multi-person HH, with kids**
  - Breakfast: 2.3 meals, 5.5 eaten with family at home, 3.2 eaten without family or not at home
  - Lunch: 1.6 meals, 5.8 eaten with family at home, 4.2 eaten without family or not at home
  - Dinner: 3.5 meals, 6.2 eaten with family at home, 2.7 eaten without family or not at home
  - Total meals together at home each week: 7.4 meals

Source: FMI U.S. Grocery Shopper Trends, 2017. Q: “Thinking about the past week, how many times have you had each of these meals?” Q: “Who did you have [meal] with?” Q: “Where did you have [meal]?” Shoppers n=1,084. (See Appendix: Table A.69)
63% of households consider eating *meals at home with family* to be very important... and substantially more important for families with kids

*(85% HHs with kids vs. 55% HHs without kids)*

**Obstacles to having dinner at home with family, by household type**

- **Differing schedules**: 55% share this concern, while 47% of multi-person HH, no kids do.
- **Too many distractions get in the way**: 21% and 16% respectively.
- **Not enough time to prepare meals**: 21% and 15%.
- **Not enough energy/Too tired**: 19% and 19%.
- **Differing tastes make it challenging**: 18% and 13%.
- **Difficulty finding a recipe that everyone likes**: 16% and 9%.
- **Going out/ordering in is a treat/indulgence**: 14% and 14%.
- **Lack of cooking skills**: 12% and 7%.
- **Takes too much time to plan and shop**: 11% and 6%.
- **Family/household are not interested**: 10% and 7%.
- **It’s too expensive**: 7% and 7%.

- **Multi-person HH, with kids**
- **Multi-person HH, no kids**
67% of households with kids **outsource cooking to the grocery store** at least some of the time (vs. 44% HHs without kids)

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**How often do you purchase ‘ready-to-eat’ items such as rotisserie chicken, sandwiches or sushi?**

- **Total:** 37% Sometimes, 15% Often, 5% Every time I shop
- **HHs without kids:** 37% Sometimes, 11% Often, 3% Every time I shop
- **HHs with kids:** 38% Sometimes, 25% Often, 10% Every time I shop

**How often do you purchase ‘heat-and-eat’ items such as fresh pizza, casseroles or soups?**

- **Total:** 40% Sometimes, 13% Often, 3% Every time I shop
- **HHs without kids:** 41% Sometimes, 10% Often, 1% Every time I shop
- **HHs with kids:** 37% Sometimes, 23% Often, 9% Every time I shop

Source: FMI U.S. Grocery Shopper Trends, 2017. Q: When you have decided not to cook, how often do you go to the grocery store specifically to purchase prepared meal items rather than going to a fast food place or restaurant? (Top-3 box: sometimes/often/every time I shop).”

Q: “How often do you purchase the following items from the fresh-food deli either to take home for dinner or eat in the store?” Shoppers n=1,084-Total; n=730-HHs without kids; n=354-HHs with kids. (See Appendix: Tables A.73-75)
Family Meals

All of this data points to why it is important to have meals together as a family and the food retail industry is perfectly poised to help!

Join us in September for National Family Meals Month™!

Goal:
Encourage one more family meal at home each week.

2016 National Family Meals Month Participants:
56 Retailers, 15 Suppliers, and 37 Community Partners
Family Meals Best Practices

• Creating and executing omnichannel marketing approaches
• Innovative in-store execution
• Engaging consumers
• Collaborating with others
• Engaging employees
• Program evaluation
New -2017 Retailer Contributions to Health and Wellness

- 2017 Health and Wellness Offerings
- Connecting Consumers to Better-for-you
- In-Store Health Professionals
- Building Credibility with Community Partners
- Healthy Eating Expectations in the Aisles
- Cooking up Wellness
04 Transparency
TRANSPARENCY IS THE CURRENCY OF TRUST IN THE DIGITAL AGE

In a world of shopping options and fast moving information, consumers see transparency as a shortcut to confidence in a complex food system.

Against a post-modern backdrop of skepticism,

“Food companies aren’t interested in being transparent. They’re interested in giving the appearance of transparency.”

—Kevin, 32
FMI’s Transparency Webinar will

- Parse out what transparency is and what it isn’t
- Distinguish where Consumers hold Manufacturers accountable and areas where they hold Retailers to a higher level of responsibility
- Inform you of the transparency expectations that if satisfied best drive customer loyalty
- Point you to the customer expectations create the greatest credibility halo?
Learn more about Grocery Shopping Trends and download the full report at:

www.fmi.org/grocerytrends