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Methodology & Survey Data
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Introduction

Increasingly sophisticated technological tools may have made completing life’s tasks more efficient for many Americans, but they have changed their expectations as well. Provided with ongoing access to a wealth of education and inspiration, consumers now seek their own ideal version of ... well, everything. From coffee shops to banking, consumers now expect companies they interact with to go beyond just “customer-centric” by offering products and services that feel personalized to individual consumers’ needs.

Building on more than four decades of research into grocery shopper attitudes and behaviors, including last year’s examination of what it means to “eat well” and “shop well,” FMI’s U.S. Grocery Shopper Trends 2019 study takes a deeper look at personalization in the context of grocery retail. We explore how consumers personalize their eating and negotiate needs within their households and examine how grocery retailers can support shoppers as they pursue their ideal, individualized ways of eating.
We may be seeing the beginning of a plateau in the reach of online grocery shopping as other cohorts catch up to flat-trend Millennials

- Online continues to grow, now fully doubled from 2015, with 32% of shoppers using online-only retailers at least occasionally. Among Gen X, users grew by more than one-third over last year’s base. Online shoppers now see online as on par with the supermarket in meeting a number of key shopping needs and increasingly accept online for fresh categories that were previously the distinctive domain of the brick-and-mortar store.
- Yet there are signs of headwinds against further growth. Reach among Millennials (the first generation to flock to online en masse) has not grown in the last two years, suggesting that after Gens X and Z catch up, the online user base may soon plateau. Unless retailers introduce new disruptive ideas for online shopping, the channel’s growth may come from increased frequency or product category use, rather than from additional shoppers.

Today’s households are eating in increasingly personalized ways as they pursue individual aspirations for eating well, heightening the basic challenges of food shopping

- Eating well as a household requires teamwork, negotiation and compromise. While consumers value the flexibility to eat how they want, they also resist splintering the household. They don’t often seek personalized solutions but instead use a range of tactics from eating to planning to shopping to balance and reconcile individual needs and preferences within the household.
- Consequently, shoppers enter the store tasked with meeting not only their needs and wants but those of others in their household. Customizing and humanizing the shopping experience in a way that empowers different shoppers to meet these different needs within the store can help retailers compete within and across channels.

In an era of personalization, more than ever before, earning customer trust is key to establishing the kind of relationships that make personalization possible

- Shoppers aspire to healthier diets, and while they see this goal as their own responsibility, they also recognize the grocery store as a helpful ally. As retailers innovate in ways to engage the shopper more deeply, they will be able to earn additional trust through transparency and community engagement but also simply by consistently and attentively meeting shoppers’ needs around product quality, selection, information and helpful customer service.

Methodology Summary

This report draws on past FMI U.S. Grocery Shopper Trends annual surveys while highlighting new insights through a combination of qualitative research and a quantitative survey, both fielded in the winter of 2019. The survey was fielded nationally across the U.S. among a total of 1,786 shoppers of groceries, 18 years and older. For deeper context, a mix of virtual, in-home and in-store interviews and ethnographies captured insights in person from a total of 12 consumers from multi-shopper and single-person households. In-person interviews were conducted in the greater Seattle area, and virtual interviews were fielded across the nation. Additional analysis was conducted with U.S. Census data on consumer spending.

NOTES:

Generational cohort definitions:

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<td>Gen X: 39-54</td>
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Percentages as displayed in this report may not add to 100% due to rounding.