2014 NATIONAL GROCERS ASSOCIATION SUPERMARKETGURU©

CONSUMER SURVEY REPORT

presented by

NGA® NATIONAL GROCERS ASSOCIATION

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EXECUTIVE SUMMARY

Supermarkets and the nation's consumers each want 2014 to finally stamp the recession as history – and launch a prolonged era of successful growth. Today's livelier economy has food retailers more consumer-centric than ever to earn destination status and a consummate payoff. At the same time, chief household shoppers look well beyond price for what would optimize their primary food stores.

We're still far from euphoria. Spending reins are widely in place among American consumers, though maybe not as tightly as in recent years. And since real sales growth is slim - practically a zero-sum competition in many regions - supermarkets feel pressure to excel in many areas to satisfy evolving shopper demands.

Still, it appears daylight is ahead for supermarkets that engage in Best Practices.

Insights from this annual benchmark 2014 National Grocers Association-SupermarketGuru Consumer Survey Report can help operators address the precise areas where customers want to see improvement, and reaffirm areas where stores already get credit for doing well. In short, to become better at the Best Practices that matter most to America's food-buying public.

Survey findings identify for regional food chain executives where they should create significant points of competitive difference – in areas such as: fresh foods and nutritional support to help people eat healthier; professionals on the selling floor to guide food-buying decisions; convenient location and access, navigable layouts and checkout processes that save time; new and innovative products that excite "confident in the kitchen" consumers who want to avoid meal tedium in their households; courteous, custom services for people with special needs; a feeling of safety around the store; the use of technology to tailor marketing messages and promotional offers, and offer online ordering/store pickup/home delivery capabilities; and, not least of all, caring, to name a few.

Why these aspects of the supermarket? First, consumers value these in the survey. Second, stores that perform well on these points enhance chief household shoppers' ability to integrate food into their lifestyles on their terms. The more personalized the shopping experience at friendly, nimble regional supermarkets, the greater their edge over retailers less connected to communities and less empowered to please people as personal situations arise. Third, regional mastery of these points helps overcome regionals' lack of financial clout to strike deals as deeply as big box, online and near-national competitors. Fourth, stores that do all this make people feel the retailer "cares" for them, and augment their strength as neighborhood hubs with powerful relationship advantages over marketplace encroachers.

Fact is, as long as retailers perform well and ethically enough to earn support, people tend to prefer to buy from locally owned, operated and staffed stores rather than from competitors based elsewhere that funnel money out of shoppers' communities. When people see regional retailers employing neighbors and friends, keeping prices fair, backing civic groups, schools and local sports teams, and helping communities beset by natural disasters, they see that as caring, and they want to help that continue.

EXECUTIVE SUMMARY

In a narrower shopping sense, caring is "a clean, well-organized store" to more than 55% of survey respondents, as is "produce, meats and seafood are always fresh" to more than 40% of respondents.

So there is an emotional side to where shoppers decide to do most of their food shopping. But practicality rules the store selection process. Regionals need to enhance their place in shoppers' hearts with performance excellence that earns them a place in shoppers' minds.

What did survey respondents specifically say is rising in importance in 2014? These are some of the biggest point jumps in our new research findings:

- Accurate shelf tags. Up 5 points to 79.6% "very important" as a store attribute, this measure shows how closely shoppers are watching their wallets, and how strongly they feel about pricing accuracy.
- Personal safety outside the store. Up more than 3 points to 64.5% "very important," this figure shows it's not just what's inside the store that counts. Surrounding areas have to be approachable and make people feel secure.
- Courteous, friendly employees. Up more than 10 points to 59.2% "very important," this jump shows how dearly people want to be appreciated and respected for the business they give a retailer.
- High-quality meats. Up 3 points to 74.4% "very important," people expect more for the higher prices they pay, and they want at-home meals to include nutritious, filling and satisfying protein.
- Conveniently located. Up nearly 17 points to 53.0% "very important," this results from tight time constraints and persistently high gasoline prices. But location still provides no lock on consumers in a neighborhood; there is too much competition.
- Fast checkout. Up nearly 9 points to 48.9% "very important," people are tantalizingly close to the store exit and want to expedite this part of the shopping trip.
- Store layout that makes it easy to shop. Up almost 8 points to 51.2% "very important," navigable aisles mean time saved for shoppers and fewer distractions from the purpose of their trip.

Meanwhile, supermarkets command the fresh-food spend within their trading areas. The highest level ever in the survey's history, 85.9% of respondents say they spend more than half of their fresh-food dollars in supermarkets. This is up from 84.3% in the prior two years.

This strength in fresh foods dovetails with consumers' desire to eat healthier – as well as with nutritionists' and dietitians' rise in consumer recognition. According to our research, these professionals are now the second-most trusted resources for nutritional information – behind the Internet, but ahead of industry journals, magazines and physicians. Consumers also say they would rely more on nutritionists and dietitians on a regular basis – and some would pay for services tied to their individual wellness goals, weight loss, and best and worst foods for specific health conditions.

METHODOLOGY

On behalf of the National Grocers Association, SupermarketGuru.com conducted a national consumer panel online between October and November 2013. In all, 1,380 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 123 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 75.8% female.

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Report may be purchased at www.nationalgrocers.org
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1- PRIMARY FOOD STORE

WHERE DO YOU PURCHASE THE MAJORITY OF YOUR FOODS?

Supermarkets are barely below last year's pace of 84.0%. The current 83.9% figure matches 2012, when a four-year slide finally ended. The new stability suggests supermarkets have withstood the worst fallout of the recession – and are serving up food products and services the way most chief household shoppers want them.

Indeed, shoppers in every spending tier up to $100 per week per household exceeded the average (84.0% to 88.7%). So did the largest households of 5 or more (92.8%). And so did the youngest shoppers age 24 and under (86.5%) and 25 to 39 (91.2%).

Among alternate channels with relatively small shares, the most significant slips from 2013 occurred at: mass merchandisers, down to 3.4% from 5.4%, and warehouse clubs, down to 3.4% from 4.2%. As recently as 2011, mass posted a 7.0% level.

Grocery Store/Supermarket	**83.9%**
Warehouse Store	3.4%
Mass Merchandiser	3.4%
Specialty Food Store	3.2%
Farmer's Market	1.6%
Discount Store	1.2%
Other	1.2%
Gourmet Store	0.9%
Online Retailer (e.g.: Amazon, Supermarket Website)	0.4%
Dollar Store	0.4%
Convenience Store	0.3%
Drug Store	0.1%

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

This feature stands alone in importance when shoppers select a primary supermarket. It is the only measure that more than nine out of 10 chief household shoppers (91.5%) name as "very important." This record figure exceeds the 90.0% of 2013 and 90.8% of 2012. It reflects the pivotal roles fresh produce plays in healthier American diets, and in powerful health-and-wellness statements by stores.

The most prolific grocery spenders base their store choice largely on produce (94.8% who spend $81-$100 per week, and 93.2% who spend $101 or more). So do the highest-income households (93.8% who earn $125,001-$165,000 and 94.2% who earn $165,001 or more). Older consumers do too (93.3% between age 50-64 and 93.5% age 65 and older). Even the group that says this the least (83.8% age 24 and younger) does so at a higher rate than in the year before (80.6%).

Very Important	**91.5%**
Somewhat Important	7.8%
Not Too Important	0.5%
Not At All Important	0.2%

HIGH QUALITY MEATS

A three-point jump to 74.4% "very important" keeps this measure the #5 factor in store choice once again. Add its 18.4% "somewhat important" figure, and meats are central to 92.8% of shoppers – up from last year's 91.9%. The rise could connect to both more eating at home, and household fatigue from seeking cheaper proteins in this economy. Also, since higher feed prices have raised costs, people may simply be stating they expect more for their money.

The nation's highest-income households – the ones most likely to gain from Wall Street's rise and housing's rebound - appear to drive these figures. Respondents earning $165,001+ per year say "very" the most (77.4%); that's two points higher than last year's rate. The heaviest spenders $101+ per week also say "very" often (78.0%); that's 3.5 points higher than last year's rate. So do the largest households of 5 or more (81.9%), African-Americans (78.3%), and seniors 65 and older (78.6%).

Very Important	**74.4%**
Somewhat Important	18.4%
Not Too Important	2.7%
Not At All Important	4.6%

2- IMPORTANCE OF SUPERMARKET FEATURES

A CLEAN, NEAT STORE

When stores shine, traffic can rise. Although this measure dips slightly to 82.2% "very important" from last year's 83.7%, it is still the second most important store trait for attracting shoppers. This appeal matters more to females (83.8%) than males (77.9%), shoppers 50 and older (86.1%), and Hispanics (90.0%).

Very Important	**82.2%**
Somewhat Important	16.9%
Not Too Important	0.9%
Not At All Important	0%

ACCURATE SHELF TAGS

A dramatic five-point leap to 79.6% "very important" reflects how closely shoppers are watching their wallets – and how strongly they feel about pricing accuracy in 2014. Add the 18.2% "somewhat important" figure to reach a compelling 97.8% who likely won't shop where they feel they might get taken. The boost from last year's 96.9% escalates this to the #3 determinant of store choice. Retailers can either manage a growing number of promotions and price changes with absolute precision, or risk credibility with consumers.

Very Important	**79.6%**
Somewhat Important	18.2%
Not Too Important	2.0%
Not At All Important	0.2%

SELLING PRODUCTS BEFORE "USE BY/SELL BY" DATE

Shoppers want product dates that leave them confident in the taste, nutrition, quality and shelf life of the foods they buy. Although this "very important" figure slid to 78.1% from last year's 82.7%, its composite "very/somewhat important" figure is still a commanding 95.9%, down slightly from 97.0% in 2013. This is the #4 driver of store choice.

Very Important	**78.1%**
Somewhat Important	17.8%
Not Too Important	3.7%
Not At All Important	0.5%

2- IMPORTANCE OF SUPERMARKET FEATURES

PERSONAL SAFETY OUTSIDE THE STORE

It's not enough to make shoppers comfortable inside the supermarket: the bigger picture includes how secure people feel moving about the surrounding area. Does it feel safe? Is it lit well and uncluttered, with open visibility and smooth surfaces to walk on that are kept free of ice and snow?

Very Important	**64.5%**
Somewhat Important	27.8%
Not Too Important	6.1%
Not At All Important	1.6%

For nearly two-thirds of respondents (64.5%), this factor is "very important" in where they decide to shop. That's up from 61.2% a year ago. It is "very/somewhat important" to 92.3% of shoppers, up from 90.5% in 2013.

The importance rises with shopper age: 65.8% of those age 50 to 64, and 73.6% of those 65 and older describe this as "very important." So do 87.0% of African-Americans, 73.3% of Hispanics, and 69.1% of households with annual incomes less than $45,000.

COURTEOUS, FRIENDLY EMPLOYEES

Shoppers want a welcome feeling where they spend money regularly. An overwhelming 97.2% say it is "very/somewhat important" to their choice of a primary supermarket. Indeed, six in ten (59.2%) say "very," which is more than 10 points above the 48.5% level in 2013 and 46.4% in 2012.

Very Important	**59.2%**
Somewhat Important	38.0%
Not Too Important	2.7%
Not At All Important	0.1%

A STORE LAYOUT THAT MAKES IT EASY TO SHOP

Navigable aisles mean time saved for shoppers, who are less distracted from their primary trip missions. This is why 51.2% consider this "very important" in selecting a primary supermarket, and 94.1% say "very/somewhat." This is the third straight year the figure has escalated – from 43.4% "very" in 2013 and 41.6% in 2012 – a sure sign people are less tolerant of inefficient store design.

Very Important	**51.2%**
Somewhat Important	42.9%
Not Too Important	5.6%
Not At All Important	0.3%

Leading the "very" response are: African-Americans (65.2%), seniors 65 and older (61.7%), and females (53.1%).

2- IMPORTANCE OF SUPERMARKET FEATURES

CONVENIENTLY LOCATED

Combine today's time constraints with persistently high gasoline prices to reach what this survey finds: convenience matters to nearly all shoppers (96.9% say it is "very/somewhat important" to store choice), and especially so for a clear majority (53.0% "very"). These figures propel convenience onto the Top 10 list of key factors, up from the #14 slot in 2013.

This store trait had previously peaked at 41.0% "very" in the recession year of 2010, and was several points lower since then. However, today's higher level of importance doesn't give any well-located supermarket a lock in its neighborhood – not with smaller food-store formats filling in, and more aggressive food postures by drug, dollar, club, mass and convenience stores.

Convenient location is most important to African-Americans (78.3% "very"), Asians (68.4% "very), and consumers age 25 to 39 (64.4% "very").

Very Important	**53.0%**
Somewhat Important	43.9%
Not Too Important	3.0%
Not At All Important	0%

ITEMS ON SALE OR MONEY-SAVING SPECIALS

Shoppers love the excitement of deals – so this measure continues to mean significantly more to them than ongoing low prices. This figure did slip beneath the majority threshold in 2013 (49.1% "very important"), yet it rebounds to 51.2% "very" in 2014. Though still well beneath the 2010 recession peak of 60.0%, it underscores the need for retailers to maximize the impact of trade promotions – and message consumers early and often in their trip-planning process to secure an image for sharp deals.

It matters most to: households with annual incomes of $45,000 or less (67.1%), African-Americans (65.2%), seniors 65 and older (61.2% "very"), and the largest households of five or more (57.8%).

Very Important	**50.4%**
Somewhat Important	42.4%
Not Too Important	6.5%
Not At All Important	0.7%

2- IMPORTANCE OF SUPERMARKET FEATURES

FAST CHECKOUT

This last step to freedom frustrates shoppers if delays happen for any reason. A speedy ending to the trip is the goal for most – 96.2% say it is "very/somewhat important" to their store selection, including 48.9% who say "very," up nearly nine points from a year earlier.

Both ends of the spending spectrum show strong feelings - 64.0% who spend $40 or less per week at the supermarket, and are used to express lanes, and 50.5% who spend $101+ per week, and usually have the largest baskets. Also seeking front-end urgency: 56.8% of the highest-income households of $165,0001+ annually.

Very Important	**48.9%**
Somewhat Important	47.3%
Not Too Important	3.7%
Not At All Important	0.2%

HIGH-QUALITY SEAFOOD DEPARTMENT

Light proteins from near and distant waters appeal to more than three-quarters of shoppers (78.0%), who say this showcase is "very/somewhat important" to their choice of a primary supermarket. The "very" component floats up to 48.8% from 45.5% in 2013, perhaps reflecting the higher popularity of the mild-tasting, inexpensive fish tilapia.

Though most seafood is priced higher than meat per pound, it is the lowest-income households earning $45,000 or less per year who cite seafood the most (54.3% "very important") of all income groups. Other big fans: African-Americans (78.3% "very"), seniors 65 and older (59.7% "very"), and single-person households (54.0% "very").

Very Important	**48.8%**
Somewhat Important	29.3%
Not Too Important	13.5%
Not At All Important	8.4%

2- IMPORTANCE OF SUPERMARKET FEATURES

OFFERS LOCALLY GROWN PRODUCE & PACKAGED GOODS

Supermarkets aligned with local food sources can attract shoppers who feel food loses less nutrition and taste by traveling less, and who want to support the local economy and nearby suppliers. A combined 87.2% say this is "very/somewhat important" to their choice of a primary food store. This figure is up slightly from the 2013 level (85.0%), and it nearly equals the 2012 peak of 87.8%.

Leading the "very important" component (44.2% overall) are: Hispanics (53.3%), single-person households (49.4%), and adults between the ages of 50 and 64 (46.2%).

Very Important	**44.2%**
Somewhat Important	43.0%
Not Too Important	9.5%
Not At All Important	3.3%

HIGH-QUALITY BAKERY

This department of temptations can lift certain eating occasions – but it's not a regular destination for households watching their waists and wallets. Slightly more than one-third of respondents (36.3% "very important") say their choice of a primary supermarket hinges on bakery. This is up from the most recent years, but still doesn't equal the 2010 peak of 38.0%.

Very Important	36.3%
Somewhat Important	**37.3%**
Not Too Important	17.3%
Not At All Important	9.0%

PAYING ATTENTION TO SPECIAL REQUESTS OR NEEDS

For four out of five consumers (79.9%), this is a "very/somewhat important" shaper of where they decide to shop for food. This exceeds the 2013 figure by 1.1 points, yet is still well below the 80.3% level of 2010 and 2011.

Leading the 35.3% "very" response: African-Americans (69.6%), seniors 65 and older (51.2%), and females (36.8%).

Very Important	35.3%
Somewhat Important	**44.7%**
Not Too Important	17.3%
Not At All Important	2.8%

2- IMPORTANCE OF SUPERMARKET FEATURES

LOW PRICES

Very Important	34.3%
Somewhat Important	**58.4%**
Not Too Important	6.9%
Not At All Important	0.5%

Low prices alone won't draw traffic, since shoppers seek diverse appeals in a supermarket – most of them not related to dollar costs. Shoppers are less panicked by food prices in 2014 than they were in the recession years of 2009 and 2010, when 51.0% said low prices were "very important" to their choice of a primary supermarket. The current "very" measure of 34.3% suggests that people want their primary food store to attract them in many ways.

However, it is also clear that supermarkets do need to price competitively against the likes of Walmart, Costco, Amazon and AmazonFresh, Aldi, Grocery Outlet and dollar stores. The current 92.7% "very/somewhat important" figure shows the ongoing importance of price; this is down slightly from 2013's 94.2% level.

Low prices are a bigger concern to Asians (44.7% "very"), African-Americans (43.5%) and Hispanics (36.7%) than Caucasians (32.7%). They are also key influencers of: females (35.7%) vs. males (27.5%); consumers 24 and younger (43.2%); single-person (38.4%) and five-person households (41.0%); and the lowest annual income tier of $45,000 or less (51.0%).

FRESH FOOD DELI OR DELICATESSEN

Very Important	31.5%
Somewhat Important	**35.0%**
Not Too Important	25.7%
Not At All Important	7.8%

Fewer than one-third of respondents (31.5% "very important") center their primary supermarket choice around deli. This is the lowest level in five years, down from 42.0% in 2010. Also lower is the collective "very/somewhat important" figure, down to 66.5% in 2014 from 67.9% in 2013 and 75.0% in 2010. Stiff competition in convenient fresh and prepared food options should push supermarkets to innovate in ready-to-eat foods and faster ways to service customers at the deli.

2- IMPORTANCE OF SUPERMARKET FEATURES

ORGANIC PRODUCTS

Just three out of ten adults (30.1% "very important") shop where they do because of organic foods. This slight rebound from last year's 28.2% approaches the recent highs of 30.3% in 2012 and 31.0% in 2011.

The trend is similar in the collective "very/somewhat important" measure. The rise to 64.7% in 2014 tops last year's 61.4%, but has less steam than the 67.4% of 2012 and 2011.

Consumers age 24 and younger, African-Americans, and the heaviest-spending households ($101 or more per week on groceries) lead the "very important" response.

Very Important	30.1%
Somewhat Important	**34.6%**
Not Too Important	24.0%
Not At All Important	11.3%

NUTRITION AND HEALTH INFORMATION AVAILABLE FOR SHOPPERS

Perhaps this figure slid because so much information is a click away on the Internet – and nutrition and health decisions happen earlier in the path to purchase. Or because nutrition facts labels on packages tend to confuse. Or both.

While it is true that the presence of nutritional insights is "very/somewhat important" to store choice for 68.1% of consumers, this is lower than 2013's 73.0% level, 2012's 73.6%, and 2011's 76.0%. The dip may have more to do with how guidance is served up, and how credible it is, than any less interest by consumers in eating healthier and making sound decisions at the shelf.

This is "very important" to: shoppers age 24 and younger (59.5%); Hispanics (43.3%) and African-Americans (39.1%); the lowest annual income tier of $45,000 or less (35.0%); and females (32.4% vs. males 21.0%).

Very Important	29.6%
Somewhat Important	**38.5%**
Not Too Important	23.7%
Not At All Important	8.1%

2- IMPORTANCE OF SUPERMARKET FEATURES

GOOD SELECTION OF ETHNIC OR CULTURAL FOODS

The national palate continues to shift with growing ethnic populations and their influence on neighbors, who are inclined to eat more kinds of foods at home to help avoid meal tedium. Seven out of ten respondents (70.5%) say this trait is "very/somewhat important" to their store choice – that's up from 65.5% in 2013. The "very" component is also higher in 2014 – 26.0% vs. 21.6% a year ago.

Leading the "very" response are Hispanics (46.7%) and Asians (39.5%), and consumers age 24 and younger (40.5%).

Very Important	26.0%
Somewhat Important	**44.5%**
Not Too Important	22.6%
Not At All Important	6.8%

A FREQUENT SHOPPER PROGRAM OR SAVINGS CLUB

Stores that excel at loyalty programs make cardholders feel special with targeted deals, exclusive events, and opportunities to experience food in new ways. Such efforts take programs beyond their general discount nature, and bond shoppers to their supermarkets. However, these operators are in the minority.

Retail food stores typically run mundane programs. Even those have 61.8% of consumers already feeling that loyalty programs are "very/somewhat important" factors in their choice of a primary supermarket – because they are gateways to discounts. The "very" component rises to 24.9% in 2014 from 22.0% in 2013. This is the highest level in recent years, yet still not up to the 28.0% peak in the 2010 recession year.

Loyalty programs are most coveted by: African-Americans (43.5% "very") and Hispanics (43.3%); consumers age 24 and younger (40.4%); the lowest income tier of $45,000 or less annually (34.6%); and larger households of five or more (27.7%).

Very Important	24.9%
Somewhat Important	**36.9%**
Not Too Important	24.9%
Not At All Important	13.2%

2- IMPORTANCE OF SUPERMARKET FEATURES

PRIVATE LABEL OR STORE BRANDS

Consumers focus more on private label in 2014 (66.5% "very/somewhat important" to store choice) than in 2013 (64.3%) and 2012 (65.6%) – though not quite as much as in 2011 (68.0%) and 2010 (69.0%), when the recession was more on their minds.

People not only save when they buy private label. Innovative retailers help them add zest to meals with new flavor combinations that are well packaged and easy to prepare. It is a way to help renew interest in center-store and drive trips with exclusive offerings. Such efforts help raise the "very" component to 23.3% in 2014, from 20.3% in 2013.

Private label matters most to: consumers age 24 and younger (32.4% "very"); the two lowest household income tiers, up to $85,000 annually (28.1% to 30.5%); every spending tier up to $100 per week on groceries (24.4% to 28.4%); and Caucasians (23.9%).

Very Important	23.3%
Somewhat Important	**43.2%**
Not Too Important	25.2%
Not At All Important	8.3%

BEING ACTIVE OR INVOLVED IN THE COMMUNITY

Retailer support can take many forms, from helping in the event of natural disasters to backing local sports teams and charities. For 57.8% of consumers, this is a "very/somewhat important" factor in where they primarily buy food. The "very" component is up from last year's 14.8%, though it is a compelling influence for just 16.8%.

Very Important	16.8%
Somewhat Important	**41.0%**
Not Too Important	25.8%
Not At All Important	16.4%

SELF-CHECKOUT/ SELF-SCANNING

One-and-a-half times as many respondents say this is "not too important/not at all important" (60.9%) than feel it is "very/somewhat important" (39.1%) to their choice of a primary supermarket.

Very Important	10.5%
Somewhat Important	28.6%
Not Too Important	**34.7%**
Not At All Important	26.2%

2- IMPORTANCE OF SUPERMARKET FEATURES

MOBILE MARKETING

Just one consumer in ten thinks this is "very important" (9.6%) to their choice of a primary supermarket. Yet more than four in ten (42.3%) collectively feel that digital coupons, check-in offers and apps engage them to a point that "very/somewhat" sways where they decided to food-shop. These matter most to consumers age 24 and younger (18.9% "very important").

Very Important	9.6%
Somewhat Important	**32.7%**
Not Too Important	32.5%
Not At All Important	25.2%

PHARMACY

Between the diabetes surge and the aging of America, pharmacy has the potential to care for more customers and be an important hub of the supermarket's health and wellness image. Current figures show the department is a "very/somewhat important" influence on store choice for just 28.1% of shoppers – though that is up from last year's 26.4% and 2012's 27.6%.

Very Important	8.6%
Somewhat Important	**19.5%**
Not Too Important	31.2%
Not At All Important	40.7%

DIETITIAN PRESENCE

Consumers are beginning to notice a professional presence on the selling floor in registered dietitians - who can guide them to smarter choices, especially for wellness-driven consumers and for the purchase of foods for people with specific health conditions. More than one consumer in five (20.5%) says dietitians are a "very/somewhat important" influence in their choice of a primary supermarket.

Their strongest advocates include: Hispanics (26.7% "very important") and African-Americans (21.7%); consumers age 24 and younger (18.9%) and 24 to 39 (13.4%); households of five more (10.8%); and females (8.0%).

Very Important	6.8%
Somewhat Important	13.7%
Not Too Important	34.6%
Not At All Important	**45.0%**

2- IMPORTANCE OF SUPERMARKET FEATURES

ADVANCED DELI-ORDER TECHNOLOGY

This is one way to help break through the logjam of lines at the service deli. It makes a difference to more than one out of five consumers (22.3%), who call it "very/somewhat important" to where they decide to food-shop. The "very" component is just 5.4%, but that could rise as in-store kiosk placement, website alternatives and order execution improve.

Very Important	5.4%
Somewhat Important	16.9%
Not Too Important	37.2%
Not At All Important	**40.5%**

ONLINE BUYING SERVICE

Perhaps this will rise in importance as food deliverers build a presence in more cities, retailers develop more viable options to offer this as an efficient service, and Amazon and AmazonFresh raise awareness of the concept. Execution will need to be sharp and consistent to win over consumers, who may find the notion of mobile ordering and store pickup or home delivery appealing.

For now, just one in 25 consumers (4.0%) say this is a "very important" factor in where they decide to food-shop.

Very Important	4.0%
Somewhat Important	10.6%
Not Too Important	28.7%
Not At All Important	**56.7%**

GAS PUMPS/ GASOLINE

Gasoline prices do pinch wallets and affect other spending. Which is why cents-off promotions with grocery purchases are good incentives at some chains. Yet they are limited – and they still don't make most consumers associate gas with where they're most comfortable buying food. Just 3.8% say this is "very important" to their choice of a primary supermarket.

Very Important	3.8%
Somewhat Important	13.2%
Not Too Important	28.7%
Not At All Important	**54.3%**

CHILDCARE

It's a rare mom who depends on the supermarket for babysitting while she shops. This number hasn't budged much through the years. Currently, just 5.9% say this is "very/ somewhat important" to their selection of a main food store. The only figures of greater significance are in households of four (2.8% "very important") and five (7.2%).

Very Important	1.8%
Somewhat Important	4.1%
Not Too Important	11.4%
Not At All Important	**82.7%**

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

Please rate your primary food STORE on several aspects:

A CLEAN, NEAT STORE

Six consecutive years of "excellent" gains show higher levels of consumer satisfaction. The current 59.4% "excellent" measure pushes pristineness into the #1 spot and beats the 57.6% level of 2013, 57.3% of 2012, 56.0% of 2011, 55.0% of 2010, and 51.0% of 2009.

Excellent	59.4%
Good	37.0%
Fair	3.3%
Poor	0.3%

CONVENIENTLY LOCATED

The vast majority of consumers (94.4%) say their primary supermarket is convenient to where they live or work. This year's "excellent" rating (58.9%) is in the mid-range of the past few years – it tops last year's 58.1% and 2011's 56.0%, but is beneath 2012's 59.5%.

Excellent	58.9%
Good	35.5%
Fair	5.4%
Poor	0.2%

SELLING PRODUCTS BEFORE "USE BY/ SELL BY" DATE

Supermarkets have the right rotations: "Excellent" ratings edged up to 52.8% and extended a five-year ascent from 52.3% in 2013, 51.2% in 2012, 51.0% in 2011, and 46.0% in 2010. Also, the latest "excellent/good" measure (94.0%) approaches the high of this stretch – 93.7% in 2013, 94.7% in 2012, 94.0% in 2011, and 91.0% in 2010.

Excellent	52.8%
Good	41.1%
Fair	5.7%
Poor	0.3%

COURTEOUS, FRIENDLY EMPLOYEES

Shoppers visit supermarkets more than any other kind of retailer – and consistent warmth helps earn their trips. Nine out of ten respondents (90.1% "excellent/good") say their primary food stores deliver on this measure. This is the highest score since the recession, up from 87.4% in 2013, 88.4% in 2012, 87.0% in 2011, 86.0% in 2010, and 84.0% in 2009. The "very" component (48.7%) is also a beat above 2012's 46.4%, 2011's 44.0%, 2010's 43.0%, and 2009's 40.0%.

Excellent	48.7%
Good	41.4%
Fair	9.2%
Poor	0.8%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

HIGH-QUALITY FRUITS & VEGETABLES

The highest ratings in six years show supermarkets understand the pivotal role of produce quality in earning repeated store trips. A jump to 93.4% "excellent/good" tops last year's 90.1%, as well as 2012's 89.5%, 2011's 90.0%, 2010's 87.0%, and 2009's 86.0%. The "excellent" component jumped more than four points to 47.6% from 43.5% in 2013.

Single-person households (55.3%) set the "excellent" pace, as did Caucasians (48.8%) and African-Americans (47.8%) among ethnic groups, all spending tiers up to $100 per week on groceries (48.0% to 53.3%), seniors 65 and older (51.0%), and males (50.4%).

Excellent	**47.6%**
Good	45.8%
Fair	5.8%
Poor	0.8%

PERSONAL SAFETY OUTSIDE THE STORE

More than nine out of ten shoppers (91.0%) rate their primary supermarket "excellent/good" on this measure – a mark slightly above last year's 90.8%, but not quite as high as 2012's 91.4%. The "excellent" component (46.1%) dips below last year's 46.8% and 2012's 46.6%, but is well above 2011's 41.1% and 37.0% of the two years before that.

Excellent	**46.1%**
Good	44.9%
Fair	7.2%
Poor	1.9%

PRIVATE LABEL OR STORE BRANDS

Consumers endorse store brands of their primary supermarkets more in 2014 by the most telling measure – "excellent" ratings – which rose more than five points to 45.8% from average levels of the past three years. The beat of last year's 40.1%, 2012's 42.0% and 2011's 40.0% is the first significant rise since private label became a central shopping focus in the recession.

But a different measure – the composite "excellent/good" rating of 88.1% - is lower than last year's 88.9% and 2012's 89.5%. This suggests the figure will head higher only if retailers work to improve quality and people notice it.

Four-person households (51.1%) and households earning between $125,001 and $165,000 (49.3%) lead the "excellent" ratings.

Excellent	**45.8%**
Good	42.2%
Fair	9.3%
Poor	2.7%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

HIGH-QUALITY MEATS

A three-point jump in the "excellent/good" rating to 90.3% from last year's 87.2% means supermarket butchers are making the cut in consumers' quality expectations. People may be trading down to less costly meats, but that hasn't diminished their perception of this key perishables department.

Indeed, the "excellent/good" rating is the highest its been in recent years – also topping 2012's 88.2%, 2011's and 2010's 87.0%, and 2009's 86.0%. The "excellent" component (42.6%) also beats last year's 40.5% rating.

Seniors 65 and older (52.7%) set the "excellent" pace more vigorously than they did in 2013 (47.8%) and 2012 (52.0%).

Excellent	42.6%
Good	**47.7%**
Fair	8.4%
Poor	1.3%

ACCURATE SHELF TAGS

More than nine out of ten respondents (92.8% "excellent/good") express confidence in shelf pricing at their primary supermarket. The "excellent" component jumps to 41.8% from last year's 39.1% and also tops 2012's 40.1%.

Excellent	41.8%
Good	**51.0%**
Fair	6.5%
Poor	0.8%

A STORE LAYOUT THAT MAKES IT EASY TO SHOP

Four out of ten consumers (40.1%) rate their primary supermarket "excellent" on store layout – a jump of more than five points from the average range of the past few years: 34.7% in 2013, 35.2% in 2012, and 34.0% in 2011 and 2010. The composite 89.9% "excellent/good" rating is also higher than last year's 86.8%, which suggests people also feel better about trip speed and mission completion.

Excellent	40.1%
Good	**49.8%**
Fair	9.0%
Poor	1.0%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

ITEMS ON SALE OR MONEY-SAVING SPECIALS

Primary supermarkets tend to satisfy consumers with the deals they offer. "Excellent" ratings move up to 37.6% from last year's 35.4% and 2012's 34.7% - though still below the closer-to-recession years of 2010 and 2011, each at 41.0%. Although "good" ratings slip below the majority threshold to 49.8%, the latest composite "excellent/good" rating of 87.4% beats the 85.9% mark of 2013.

The three lowest income tiers, of up to $125,000 annually per household, drove the "excellent" ratings (40.3% to 43.8%).

Excellent	37.6%
Good	**49.8%**
Fair	10.5%
Poor	2.1%

OFFERS ORGANIC FOOD OF ALL KIND INCLUDING PRODUCE & PACKAGED FOODS

"Excellent" ratings rebound to 30.0% after sliding in the prior three years – from 28.0% in 2011 to 25.7% in 2012 and to 24.9% in 2013 – as supermarkets make concerted efforts to meet the quality benchmarks of farmers' markets and natural stores, sometimes even hosting events in their parking lots. The composite "excellent/good" rating also rises to 74.7% from 2013's 70.3% and 2012's 71.8%.

Single-person households (36.3%) and consumers age 24 and younger (37.8%) drive the "excellent" response.

Excellent	30.0%
Good	**44.7%**
Fair	21.9%
Poor	3.5%

FAST CHECKOUT

Three straight years of "excellent" gains reflect less consumer frustration about waits to pay in supermarkets. Nearly three out of ten respondents (29.2%) say "excellent" today, up from 27.3% in 2013, 26.0% in 2012, and 23.0% in 2011. Mobile payment options may help escalate this measure in the future, though most stores still aren't equipped to accept these. Nothing to feel heady about – 17.5% rate their primary supermarket "fair/poor" on this measure.

Excellent	29.2%
Good	**53.4%**
Fair	14.7%
Poor	2.8%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

OFFERS LOCALLY GROWN PRODUCE & OTHER LOCALLY SOURCED PACKAGED GOODS

For the first time, more than two-thirds of consumers (67.9% "excellent/good") endorse efforts of their primary supermarkets to support nearby local food sources. Six straight years of gains in "excellent" scores push to 27.3% in 2014, up from 25.4% in 2013, 24.1% in 2012, 23.0% in 2011, 21.0% in 2010, and 18.0% in 2009. The percentage of "fair/poor" ratings abated to 32.1% from 2013's 35.1% and 2012's 35.7%.

Excellent	27.3%
Good	**40.6%**
Fair	26.3%
Poor	5.8%

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

Still far from the 2011 peak year when 58.0% of consumers rated loyalty programs at their primary supermarket "excellent/good," the 2014 measure of 52.4% still represents a gain over 2013's 51.9% and 2012's 51.0%. The "excellent" component (26.5%) also beats 2013's 24.4% and 2012's 24.2%, yet is below 2011's 29.0%. More than one-third of consumers (35.1%) say this "does not apply," since the store they shop in has no such program. Stores can attract shoppers without loyalty incentives, yet the modest endorsement shows they could improve the programs that exist.

Excellent	26.5%
Good	25.9%
Fair	9.4%
Poor	3.1%
Does Not Apply	**35.1%**

PAYING ATTENTION TO SPECIAL REQUESTS OR NEEDS

How well do primary supermarkets respond to individual situations? Just well enough for one out of five respondents (21.2%) to rate them "excellent" – nearly the same as 2013's 21.5%, and more than 2012's 19.7% and 2010's and 2011's 21.0%. In all, 71.4% feel their main food stores are "excellent/good" at this, down slightly from last year's 72.1% and 2012's 72.8%.

Excellent	**21.2%**
Good	51.2%
Fair	22.5%
Poor	5.1%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

LOW PRICES

Primary supermarkets slip in "excellent" ratings this year to 20.8% from last year's 21.1%, as alternate channels and online merchants such as Amazon keep the pressure on prices. Clearly, people shop their favorite stores for many reasons beyond low prices – good news for operators who often lack the scale to match big boxes and chains with thousands of stores (such as dollar and drug stores) penny for penny.

Overall, more than three-quarters of consumers (77.1%) feel their main food stores are "excellent/good" at being competitive on price – that's up from 74.6% in 2013 and 75.5% in 2012.

Excellent	20.8%
Good	**56.3%**
Fair	20.4%
Poor	2.6%

HAVING NUTRITION & HEALTH INFORMATION AVAILABLE

Consumers do notice and reward primary supermarkets that help them eat smarter – but fewer earn this kudos in 2014. A drop of more than four points to 18.2% "excellent" from last year's 22.6% means shelf displays and Web pages devoted to nutrition should be more prominent. The "good" ratings fell too to 44.3% from last year's 46.9%. Therefore, this latest composite "excellent/good" score of 62.5% is down seven points from 69.5% in 2013. The measure is also below those of every year since 2010.

Excellent	18.2%
Good	**44.3%**
Fair	27.8%
Poor	9.8%

MOBILE MARKETING

A majority of consumers (52.8%) feel their primary supermarkets do a "fair/poor" job of informing and incentivizing them via mobile apps, check-in offers and digital coupons. Almost one-third (31.6%) overall rate the efforts as "good." Consumers age 24 and younger were the harshest in their assessment – 62.2% say "fair/poor." Also critical are the highest-income households ($165,001+ per year) – 62.1% say the same.

Excellent	15.6%
Good	**31.6%**
Fair	27.3%
Poor	25.5%

3- RATE YOUR PRIMARY STORE'S PERFORMANCE

ADVANCED DELI-ORDER TECHNOLOGY

Knowing how deli lines frustrate, this is one area where supermarkets could and should visibly improve service efficiency. Most consumers (50.1%) think their primary food stores are "fair/poor" in their use of deli-order technology. Almost four in ten (38.4%) say "good." Four-person households were especially critical – 60.3% say "fair/poor." The heaviest-spending households of $101 or more per week on groceries also drove negative response – 53.3% say "fair/poor."

Excellent	11.6%
Good	**38.4%**
Fair	24.5%
Poor	25.6%

DIETITIAN PRESENCE

Less than one-fourth of consumers (22.6%) say their primary supermarkets provide this service in an "excellent/good" manner. More than three-quarters (77.5%) say "fair/poor." If this reflects demand for a more visible dietitian presence on the selling floor, it suggests a way food stores could add to their wellness authority and help people eat smarter overall and buy appropriate foods for specific health conditions. Consumers 24 and younger gave relatively high "excellent/good" ratings (35.1%), as did Hispanics (30.0%), and single-person households (27.3%)

Excellent	7.4%
Good	15.2%
Fair	24.4%
Poor	**53.1%**

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

For the fourth straight year, more than half of consumers (55.7%) say the 30,001-50,000 square foot format is their favorite. It is slightly less than 2011's 57.0%, the peak level during this stretch. No other size is nearly as popular. Also notable: smaller formats build their following a bit: the fresh to go 4,001-17,000 square foot store rises to 4.8% from last year's 3.9% and 2012's 3.7%, and the convenience 4,000 square foot or less store edges up to 0.9% from last year's 0.8%. Meanwhile, supercenters slide to 10.6% from 12.3% in 2013. This suggests a preference to save time rather than chase deals.

4,000 sq. ft. or Less i.e. Convenience Store	0.9%
4,001 - 17,000 sq. ft. Store i.e. Fresh to Go Store	4.8%
17,001 - 30,000 sq. ft. Store i.e. Small Conventional Store	10.7%
30,001 - 50,000 sq. ft. Store i.e. Average Store	**55.7%**
50,001 - 70,000 sq. ft. Store i.e. Combination Store	17.3%
70,000+ sq. ft. Store i.e. Supercenter	10.6%

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 four adults (25.9%) would definitely switch stores if the size was right and the supermarkets were generally comparable. That's a lot of business in play – and it should create enough urgency for operators to keep executing as well as they can. This level of 'open to switch' nears the high end of the range of the past few years – 26.6% in 2013, 27.1% in 2012, and 22.0% in 2011.

However, the proportion that would 'try it out' shrank a bit to 46.9% from 2013's 49.0%.

Most prone to switch: African-Americans (52.2%), Hispanics (36.7%), households of five or more (37.4%), and the heaviest grocery spenders $101 or more per week (27.5%).

I would try it out	**46.9%**
Yes, I would definitely switch	25.9%
No, I like my current store enough to keep shopping there	16.0%
No, size is not a main factor for me in store choice	11.1%

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

Three-quarters of consumers (74.7%) say their primary supermarket feels "perfect" – slightly more than 2013's 73.2% and 2012's 73.8%. Their biggest gripes: too little assortment (12.5%) and aisles too narrow for comfort (7.3%).

Yes, it is perfect for me	**74.7%**
No, too small, too little assortment	12.5%
No, too small, aisles too narrow for comfort	7.3%
No, too big, too much assortment	5.4%
No, too big, too much walking	4.2%
No, too small, not enough service	2.4%

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 3 improvements consumers seek stay in the same sequence as in 2013 and 2012. The difference is in the lower percentages and softer conviction of respondents.

Price/cost savings (36.1%) is down from 38.2% in 2013, 42.9% in 2012, and far below the recessionary peak of 48.0% in 2009. More locally grown foods (32.1%) dips from 33.5% in 2013, 36.6% in 2012, and 44.0% in 2011. More variety/better assortment/wider choice (25.2%) is down from 26.7% in 2013.

Rounding out the Top 5 are: more ethnic offerings (15.0%), up from 13.2% in 2013, and more fresh-made foods (14.9%), up from 11.6% last year.

Consumers want more inventive and fresh foods from their primary supermarkets to help them eat healthier, with less tedium, at home. Stores that highlight these choices in merchandising and on websites could stand out.

Price/cost savings	**36.1%**
More locally grown foods	32.1%
More variety/better assortment/wider choice	25.2%
More ethnic offerings	15.0%
More fresh made foods	14.9%
Better customer service/employees	14.7%
More organic foods	12.5%
No improvements are necessary	11.6%
More gourmet foods	11.0%
Nutritional & other health information	10.7%
Offer better quality products	10.3%
More organized	8.9%
More imported foods	5.4%
Don’t know	4.3%

4- SATISFACTION & IMPROVEMENTS

SATISFACTION WITH PRIMARY STORE MEETING MY NEEDS

(1 is poor, 10 is excellent)

Uh oh. High satisfaction scores revert to 2012 levels after peaking in 2013. Last year, 71.5% of consumers rated their primary supermarket an 8 or above on a scale of 10. In 2014, however, only 65.9% rate their store this highly. That's a drop of 5.6 points.

The 8 marks slip to 33.0% from last year's 34.6% (though still ahead of 2012's 32.2%). The 9 marks fall to 21.5% from last year's 26.1% and 2012's 23.0%. The 10 marks edge up to 11.4% from last year's 10.8% and 2012's 9.9%.

Since these are stores of choice, it is a concern that more than one-third of consumers give satisfaction scores of 7 or below. The 7 marks do rise, however, to 20.6% from last year's 15.6% and 2012's 20.2%.

One (Poor)	0.2%
Two	0.2%
Three	1.2%
Four	1.7%
Five	3.7%
Six	6.4%
Seven	20.6%
Eight	**33.0%**
Nine	21.5%
Ten (Excellent)	11.4%

5- DOES YOUR SUPERMARKET CARE ABOUT YOU?

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

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

Only one store trait signifies caring to a majority of consumers: a clean and well-organized store means this to 55.3% of respondents, up from 53.9% in 2013 and 52.7% in 2012.

A large proportion of consumers (41.6%) also associate "produce, meats and seafood are always appealing and fresh" with caring. That's up from 40.8% in 2013 and 38.0% in 2012.

Completing the Top 5 are" "fair prices" (32.5%, down from 33.7% last year and 32.7% in 2012); "carries the items and brands that I like" (21.0%, down from 21.5% in 2013, but above 2012's 20.5%); and ""has fresh, local or organic foods available" (20.8%, down from 23.8% in 2013 and 23.7% in 2012).

Stores that execute these traits well can inspire more consumer support of their business.

Store is clean and well organized	**55.3%**
Produce, meats and seafood are always appealing and fresh	41.6%
Prices are fair	32.5%
Carries the items and brands that I like	21.0%
Has fresh, local or organic foods available	20.8%
Cashiers (& baggers) are fast, friendly & offer help to my car	20.7%
Runs many sales on items I use	14.3%
Fulfills special requests	14.2%
Items are never or rarely out of date	12.4%
Always in-stock on sale items	12.2%
Ample parking and is well lit	11.8%
Experts (butcher, dietitian, pharmacist) are always accessible	9.5%
Contacts me in event of a product recall	8.2%
Sends me special deals through email, texts or to my cell phone	5.3%
Supports local charities	4.8%
Has special events that are fun or educational (pet days, kid's cooking contests, guest speakers, cooking classes)	4.2%
Suggests creative meal and snack ideas	3.4%
Shops and delivers for me, for a moderate fee	1.7%

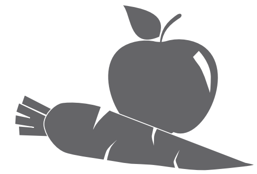
5- DOES YOUR SUPERMARKET CARE ABOUT YOU?

DO YOU BELIEVE YOUR PRIMARY SUPERMARKET CARES ABOUT YOU?

Fewer than four out of ten grocery shoppers (38.0%) feel their main food store “absolutely” cares about them. That’s up from last year’s 36.7% and 2012’s 34.1% - but it is more important to focus on the “moderately” response (51.8%, down a bit from last year’s 52.2%) that reflects a lukewarm sentiment. If supermarkets are doing what people want, they should message that to strengthen the emotional connection.

Yes, absolutely	38.0%
Moderately	**51.8%**
Barely	8.3%
Not at all	2.0%

6 - FRESH FOODS



FOODS THAT DRIVE SUPERMARKET SHOPPING

For nearly three-quarters of consumers (73.6%), perimeter fresh foods are the main draws. This extends a rise from 69.2% in 2013 and 66.4% in 2012. Households in the highest-income tiers of $85,001 and above express this the most, from 74.7% to 84.0% of the time. More than three-quarters (75.3%) of the largest grocery spenders, $101+ per week, also drive this response.

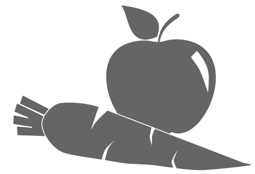
Fresh	**73.6%**
Shelf-Stable	20.2%
Frozen	6.3%

PRESENTATION OF FRESH FOODS

Consumers want produce that looks and tastes freshly picked, but without the dirt. Once again, clean displays top the list of what matters most to respondents in the visible presentation of fresh foods. With precisely two-thirds (66.6%) saying this, the measure rises above last year's 66.4% and 2012's 64.4%. Rounding out the rest of the Top 5: "appealing appearance of food" (55.8%) tops the 48.9% mark of both 2013 and 2012; "products are not past sale date" (31.7%) drops from 2013's 37.9% and 2012's 37.5%; "locally grown" (22.1%) dips from 2013's 22.4% and 2012's 24.2%); "packaging that gives me a clear view of product" (21.7%) declines from 2013's 22.7% and 2012's 22.4%.

Cleanliness of display	**66.6%**
Appealing appearance of food	55.8%
Products are not past sale date	31.7%
Locally grown	22.1%
Packaging that gives me a clear view of product	21.7%
Size appropriate to my needs	18.1%
Organic	15.3%
Packaging that preserves freshness	13.5%
Source traceability	10.2%
Packaging with nutritional information	7.5%
Sustainability	7.3%
Packaging with cooking instructions	2.9%
Brand name	2.0%
Recipes	1.8%

6- FRESH FOODS



MOST IMPORTANT FRESH FOODS DEPARTMENT

For more than two out of three consumers (68.3%), produce is the pivotal traffic driver. This is the highest measure in recent years, up from 64.6% in 2013 and 67.6% in 2012. Among other key perishables, meat slides to 16.3% from 2013's 18.7%, dairy dips to 4.7% from 2013's 5.1%, seafood moves up to 4.1% from 2013's 3.8%, and prepared foods climb to 1.6% from last year's 1.3%.

Produce	**68.3%**
Meats	16.3%
Dairy	4.7%
Seafood	4.1%
Prepared Foods	1.6%
Deli	1.5%
Bakery	1.4%
Poultry	1.3%
Cheeses	0.8%

PROPORTION OF FRESH-FOOD DOLLARS SPENT IN THE SUPERMARKET

Supermarkets command the fresh-food spend within their trading areas. Posting the highest-ever level, 85.9% of survey respondents say they spend more than half of their fresh-food dollars in supermarkets. This is up from 84.3% in the prior two years; the increase came mostly from households that had spent between one-quarter and one-half of their fresh-food dollars at supermarkets in 2013.

91% or more	27.5%
76% to 90%	**33.0%**
51% to 75%	25.5%
26% to 50%	10.0%
25% or less	4.0%

WHY EAT FRESH FOODS

With nearly identical figures to 2013, "health" dominates once again as the leading reason why people eat fresh foods. Since its current figure (57.5%) is slightly below last year's 58.2%, and "taste" rose nominally to 38.2% from last year's 37.5%, health's margin narrows for the second straight year. This suggests people actually like eating fresh foods and will continue. Another reason to focus on fresh: the heaviest grocery spenders $81+ per week (39.3% to 43.2%) lead the "taste" response, as do consumers age 50-64 (42.8%) and 65+ (41.3%).

Health	**57.5%**
Taste	38.2%
Convenience	2.2%
Value	2.1%

7- CAUSE MARKETING

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

"No" is the answer for the largest plurality of consumers (30.7%, down from last year's 33.4%). A clear-cut "yes" is one of the smallest response bases (16.1%, up from last year's 12.7%). For most (53.2%, down from 2013's 53.9%), this is a gray issue that hinges on the retailer's prices and the causes it supports.

Yes	16.1%
No	**30.7%**
Depends on prices	12.6%
Depends on causes	13.9%
Depends on prices & causes	26.7%

WHAT IF PRICES ROSE TO ALLOW FOR DONATIONS?

There's a limit to what most people will pay, even for causes they believe in. Tamping down on their generosity, 56.0% of respondents say they'd willingly pay up to a 2% premium (up from 53.6%), and 11.8% say they'd pay up to a 5% premium (nearly identical to last year's 11.9%). But the number of people for whom the price makes no difference shrinks to 32.2% from last year's 34.5%.

Yes, as long as price difference was no more than 2%	**56.0%**
Yes, as long as price difference was no more than 5%	11.8%
Amount of price difference makes no difference to me	32.2%

TRAVEL DISTANCE TO SHOP IN A "CAUSES" SUPERMARKET

Most consumers (54.0%) say they wouldn't pay more and travel more. This figure stays within the range of the prior two years – 55.1% in 2013 and 53.9% in 2012. More than one-fourth of respondents (27.4%) would travel up to a mile or two further – that's more than last year's 25.0% - but few would travel any longer than that.

No	**54.0%**
Yes, up to a mile or two further	27.4%
Yes, up to five miles further	14.5%
Yes, up to ten miles further	4.0%

7- CAUSE MARKETING

PRIVATE LABEL SALES TIED TO DONATIONS

Consumers shrug at the notion of private label purchases, at higher prices, contributing to worthy causes. More than six out of ten (62.9%) would "buy the same amount," compared with 61.6% who said this last year. Nearly twice as many (23.6%) would "buy less" than would "buy more" (13.5%).

I'd buy more of them	13.5%
I'd buy the same amount of them	**62.9%**
I'd buy less of them	23.6%

CAUSES TO SUPPORT

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

The Top 5 causes consumers want supermarkets to support are the same, and in the same order, as in 2013 and 2012. "Relieving hunger" is #1, cited by 56.1% of consumers (up from 52.4% in 2013), and "relieving child hunger" is #2, mentioned by 39.1% (down from 40.7% last year). Following are: "education" (31.0%, down from 31.2% in 2013), "supporting people in disaster-stricken areas" (27.9%, up from 23.9%), and "environment" (24.1%, up from 22.9%).

Relieving hunger	**56.1%**
Relieving child hunger	39.1%
Education	31.0%
Supporting people in disaster-stricken areas	27.9%
Environment	24.1%
Disease prevention	21.9%
Veterans	21.9%
Animal welfare	14.9%
Other social causes	10.0%
Wildlife protection	5.9%
Religion	1.4%

8- CHECKOUT

SATISFACTION WITH CHECKOUT EXPERIENCES

Consumers affirm more strongly this year that the supermarket checkout generally satisfies them. Nine out of ten (89.3%) say this, following 87.3% in 2013 and 81.7% in 2012. Leading the "yes, I'm satisfied" response are: Asians (97.4%); grocery spenders of $40 or less per week (96.0%), who likely use express lanes; single-person households (92.0%); and seniors 65 and older (92.0%), who may appreciate attention from a courteous cashier.

Yes	**89.3%**
No	10.8%

BOTHERSOME ASPECTS OF THE CHECKOUT EXPERIENCE

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

Although people say they are generally okay with the front-end checkout process, there are bound to be gripes. No particular frustration is cited by a majority of survey respondents – yet "wait time" tops the list at 45.4%, up from 43.1% in 2013.

The rest of the Top 5 bothersome aspects all rose in levels of mention in 2014. These include: "less-than-careful handling of merchandise by cashier or bagger" (21.4%, up from 21.3% last year); "cashier or bagger attitude" (18.2%, up from 17.1% last year); "slow transaction speed" (15.8%, up from 14.7% in 2013); and "lack of bagger" (12.3%, up from 11.6% in 2013).

Wait time	**45.4%**
Does not apply	23.9%
Less-than-careful handling of merchandise by cashier or bagger	21.4%
Cashier or bagger attitude	18.2%
Slow transaction speed	15.8%
Lack of bagger	12.3%
Can't easily see prices rung up during the transaction	11.2%
Inaccurate scanners	9.6%
Lifting merchandise from cart onto conveyor	8.6%
Clutter at front-end gets in the way	8.6%
Cashier or bagger has a cold and touches my food	7.8%
Slow checking of coupons	5.7%
Payment process complex	1.1%

8- CHECKOUT

IMPROVING THE CHECKOUT EXPERIENCE

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

Wait time is the most troublesome aspect of checkout, so "opening more lanes" makes sense as the most popular consumer suggestion (51.4%, up from 49.5% in 2013) for improving the front-end. The rest of their Top 5 ideas include: "cashiers and baggers more careful handling merchandise" (21.8%, up from 21.0% last year); "more self-checkouts" (18.0%, up from 17.4% last year); "more baggers (15.8%, up from 14.8% in 2013); and "friendlier cashiers" (15.4%, down from 15.9% in 2013).

More open lanes, so less wait time	**51.4%**
Cashiers and baggers more careful handling merchandise	21.8%
More self-checkouts	18.0%
Does not apply	17.6%
More baggers	15.8%
Friendlier cashiers	15.4%
Lanes without junk food temptations	13.0%
Faster acceptances of coupons (paper or mobile)	12.9%
Lanes with no products merchandised at all	9.2%
Walk-through technology, RFID	8.9%
Blink fast-pay technology, like at a gas pump	6.3%

9- PURCHASE COSTS AND FREQUENCY

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

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

To offset food price hikes, more eating at home, and larger, multi-generational households, U.S. chief household shoppers are using promotional deals, alternate channels and less costly brands and private label to help cap their grocery spend. For the first time in at least three years, the top-spending tier of "more than $136 per week" on groceries declines in the percentage of respondents - to 20.4% of households in 2014. This is down from 22.1% in 2013 and 21.4% in 2012, though is still well above the 14.0% in 2011.

In all, nearly two-thirds of U.S. households (62.0%) spend $96 or more per week on retail food. That's down slightly from 63.6% in 2013 and 64.1% in 2012.

The rest of the upper-spending tiers look like this: $96-$105 (13.7%, up from 13.2% in 2013); $106-$115 (12.1%, up from 10.6% in 2013); $116-$125 (8.0%, down from 9.1% last year); and $126-$135 (7.8%, down from 8.6% a year ago).

Less than $25	0.4%
$25 - $35	2.7%
$36 - $45	2.9%
$46 - $55	7.7%
$56 - $65	7.1%
$66 - $75	6.4%
$76 - $85	6.6%
$86 - $95	4.3%
$96 - $105	13.7%
$106 - $115	12.1%
$116 - $125	8.0%
$126 - $135	7.8%
More than $136 per week	**20.4%**

FOOD SHOPPING TRIPS PER WEEK

Perhaps to obtain the freshest foods possible, the "two times a week" trip frequency regains its #1 position among consumers. Some 32.7% of survey respondents say they go to the supermarket this often, up from 31.2% in 2013, 32.2% in 2012, and steadily ascending points from the 16.0% level in 2009.

Meanwhile, the "once a week" trip frequency (31.8%) slides to #2, down from last year's 32.4% and the peak level of recent years, 35.0% in 2010. Meanwhile, a significant number of shoppers (17.1%) visit the supermarket "three times a week" to capture mid-week deals and fresh fill-ins; this is slightly below last year's 17.2% and 2012's 17.8%.

Six or more times a week	1.5%
Five times a week	2.8%
Four times a week	5.8%
Three times a week	17.1%
Two times a week	**32.7%**
Once a week	31.8%
Every two weeks	6.8%
Once a month	1.5%

10- 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)

To help stretch household budgets, shoppers are opportunists when they buy food. They bring numerous savings behaviors to the supermarket – most are trained responses to retailer offers designed to drive trips and volume.

The first four of the Top 5 head the list for the third straight year: "Stock up on an item when you find a bargain" (48.2%) rises from 46.0% in 2013 and 47.7% in 2012. "Look in newspapers for grocery specials" (39.7%) declines from 42.0% in 2013 and 45.5% in 2012. "Participate in a supermarket frequent shopper program or savings club programs" (30.1%) keeps within the narrow range between 2013's 29.3% and 2012's 30.3%. "Buy products on special even if you hadn't planned to buy them that day" (24.2%) rises from 2013's 22.7% and 2012's 23.7%.

"Buy only what's on your list" (22.8%) lands in the Top 5 for the first time, rising from 2013's 20.8% and 2012's 19.9%. It surpasses two other activities in 2014 to make the top tier – "use cents-off coupons received in the mail or from newspapers/magazines" (21.5%, down from 2013's 28.6%) and "buy store brands or lower-priced brands instead of national brands" (21.5%, up from 2013's 21.0%).

Respondents that stock up most when they find bargains are: two-person households (55.9%); the highest-income households of $165,001+ per year (55.4%); seniors 65 and older (54.7%); and the heaviest grocery spenders of $101+ per week (51.3%).

Stock up on an item when you find a bargain	**48.2%**
Look in newspapers for grocery specials	39.7%
Participate in supermarket frequent shopper or savings club programs	30.1%
Buy products on special even if you hadn't planned to buy them that day	24.2%
Buy only what's on your list	22.8%
Use cents-off coupons received in the mail or from newspapers/magazines	21.5%
Buy store brands or lower priced brands instead of national brands	21.5%
Compare grocery prices at different stores	16.5%
Go to stores other than your primary grocery store for advertised specials	9.5%
Online coupons, from a company's social media or website	7.3%
Use cents-off coupons received in the store, such as off the shelf, at checkout or at a kiosk	6.6%
Buy in larger package sizes	5.1%
Online daily deals, such as Groupon	1.0%
Use mail-in rebates for cash refunds	0.7%

10- PURCHASE INFLUENCES

SOCIAL NETWORKING TOOLS

Social media platforms increase traction with consumers, as smartphone use continues to surge and retailers and brands improve their use of analytics and messaging strategies to engage them directly – with nutrition insights, recipes, new product information and purchase incentives.

Except for YouTube (2.9%), which consumers mentioned the same amount as in 2013, every social network rises in the 2014 survey. Facebook mentions (29.9%) top 2013's 28.0% and 2012's 29.0%; Pinterest (15.8%) beats 2013's 12.5%; Twitter (6.6%) rebounds from last year's dip to 5.4% from 2012's 6.7%; and Instagram notches 2.5% in its first appearance on our survey list.

Most consumers (53.1%) still don't use social media for food, but this figure is down from 57.2% in 2013 and should continue to abate.

None	53.1%
Facebook	29.9%
Pinterest	15.8%
Other	13.3%
Twitter	6.6%
YouTube	2.9%
Instagram	2.5%

FOOD OR BEVERAGE APPS

Consumers flock to apps in a big way in 2014. More than one-third (36.9%) say that they've downloaded a food or beverage app, up from 21.0% in 2013, 19.6% in 2012, and 11.0% in 2011. This happens the most among: consumers age 24 and younger (59.5%) and 25 to 39 (56.0%); high-income households of $125,001-$165,000 per year (53.5%) and $165,001+ (47.4%); households of five or more (45.8%); and heavy grocery spenders of $101+ per week (41.5%).

No	63.1%
Yes	36.9%

11- FOOD TRUCKS

VISITED WITHIN PAST MONTH?

Only one American in seven (16.8%) has gone to a food truck within the past month. Mostly, these are consumers 24 and younger (29.7%) or 25 to 39 (28.2%), or from the $125,001-$165,000 annual income tier (26.6%) and the $165,001+ group (21.6%).

No	**83.2%**
Yes	16.8%

ALONE OR WITH ONE OR MORE OTHERS

A food truck trip is usually a casual social event too. Two-thirds of consumers who've gone to a food truck within the past month (66.3%) went with at least one other person.

With one or more others	**66.3%**
Alone	33.7%

WHAT PROMPTED THE VISIT

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

There's a free-spirited vibe around food trucks. Among respondents who go to food trucks, the reason they cite most often is "fun" (48.7%). An expectation of "tasty" food (42.2%) is the #2 trip driver. This is followed by: "easy way to try something new" (39.2%), "impulse, I saw it on the street" (27.1%), and expectation of a "quick" meal or snack (25.1%).

Fun	**48.7%**
Tasty	42.2%
Easy way to try something new	39.2%
Impulse, I saw it on the street	27.1%
Quick	25.1%
Ethnic	21.6%
It was near other trucks where we have more choices	12.6%
Cheap	11.6%
Healthy	11.1%
An easy meeting place	8.5%
I saw it on Twitter	4.5%

11- FOOD TRUCKS

EXPECTED PURCHASE ACTIVITY IN 2014

Customers of food trucks aren't tired of them yet. One out of four (24.0%) expect to buy the same amount of food from trucks in 2014 as they did in 2013; another 15.3% say they'll buy more often than they did last year; just 2.7% predict less.

I don't visit food trucks	**58.1%**
About the same	24.0%
More than in 2013	15.3%
Less than in 2013	2.7%

VISIT FREQUENCY IN 2014

Food trucks provide a monthly change of pace for most customers, research findings suggest. The vast majority of food-truck patrons (29.8% of all survey respondents) expect they'll go" less than once a month" in 2014. Only another 9.5% predict they'll go more often – 4.9% "once every three to four weeks," 2.9% "once every two weeks," and just 1.6% "once a week or more."

I don't visit food trucks	**60.7%**
Less than once a month	29.8%
Once every 3 to 4 weeks	4.9%
Once every two weeks	2.9%
Once a week or more	1.6%

12- EATING AND COOKING HABITS

HOW OFTEN DO YOU:

EAT HOME-COOKED MEALS AT HOME?

More than nine out of ten consumers (90.9%) prepare dinner in their home kitchens three or more times per week. This keeps within the range of recent years – 89.7% in 2013, 90.8% in 2012 and 92.0% in 2011 – and above earlier research findings.

Never	0.1%
Less than once a month	0.4%
One to three times a month	1.5%
One to two times a week	7.3%
Three or more times a week	**90.9%**

SERVE MEALS USING LEFTOVERS?

Nearly eight out of ten consumers (79.2%) include leftovers in meals. This is the highest figure since 2012's 78.9%. It is also nearly five points above 2013's 74.3%, which was the lowest incidence level since 2008's recessionary 74.0%.

Never	2.2%
Less than once a month	5.6%
One to three times a month	13.0%
One to two times a week	**55.6%**
Three or more times a week	23.6%

DINE OUT IN FULL-SERVICE RESTAURANTS?

Another sign of still-tight spending: Fewer than seven out of ten consumers dine out in full-service restaurants (69.4%) three times a month at most. This is the lowest figure in recent years – down from 73.3% in 2013 and 71.4% in 2012. Households that dine out one to two times a week are led by the highest annual income groups: $125,001-$165,000 annually (35.4%) and $165,001+ (41.6%).

Never	3.5%
Less than once a month	28.0%
One to three times a month	**37.9%**
One to two times a week	26.3%
Three or more times a week	4.3%

12- EATING AND COOKING HABITS

EAT TAKEOUT OR HOME-DELIVERED MEALS?

Consistent with the dining out question directly above, eight out of ten consumers (80.1%) eat takeout or delivered foods three times monthly at most. This figure keeps within the range of recent years – 80.4% in 2013, 78.5% in 2012, and 83.0% in 2011. Supermarkets could mine this opportunity to serve people who want the convenience of prepared foods without the high expense of restaurants.

Never	8.5%
Less than once a month	34.0%
One to three times a month	**37.6%**
One to two times a week	16.6%
Three or more times a week	3.4%

EAT AT FAST-FOOD ESTABLISHMENTS?

More people say they "never" go to fast-feeders (24.9%, up from 2013's 23.7%) or "eat there less than once a month" (38.7%, up from 2013's 38.0%). These figures grow despite numerous menu changes to improve food content and taste appeals, and to win over any veto voters in a household.

Meanwhile, those who eat fast food most often, "one to three or more times a week," dip to 11.6% from 2013's 12.8%. This erases most of a three-year climb from the 11.0% level of 2011 and 2010.

Least likely to eat fast food: one- and two-person households with less influence from kids (about 30.0% on average); seniors 65 and older (29.4%); and high annual income tiers between $125,001-$165,000 and $165,001+ (about 27.5% on average).

Never	24.9%
Less than once a month	**38.7%**
One to three times a month	24.7%
One to two times a week	10.0%
Three or more times a week	1.6%

12- EATING AND COOKING HABITS

EAT LOCALLY GROWN FOODS?

For the third consecutive year, consumers eat locally grown foods more often than they eat organic foods. Local is a regular habit for nearly three-fourths of the nation; only 27.0% (down from 27.7% in 2013 and 28.1% in 2012) consume "local" once a month or less. The most prolific "local" eaters – once or multiple times a day – comprise 22.3% of respondents. This is down from last year's 24.2%, but is still a significant figure.

Never	1.3%
Rarely	14.6%
On special occasions	2.5%
Once a month	8.6%
Once every other week	**18.0%**
Twice a week	15.2%
Three times a week	17.5%
Once a day	11.0%
Multiple times during the day	11.3%

EAT ORGANIC FOODS?

America splits pretty evenly between about half (53.4%) that eat organic foods regularly (from "once every other week" to "multiple times during the day") and nearly half (46.6%) that hardly eat them at all (from "never" to "once a month").

Cost is a likely factor, but so too is the lingering effect of research released in 2012 that claimed organic foods had no major nutritional benefits over conventional foods. The 53.4% figure cited above could be the start of a rebound as memory of that research begins to fade; the prior peak level was 56.6% in 2012 before the drop to 52.3% in 2013.

Leading the "multiple times a day" response: the highest-income households of $165,001+ per year (19.5%); the heaviest grocery spenders of $101+ per week (16.8%); consumers age 40-49 (16.5%) and 25-39 (15.3%); females (14.4%); and Caucasians (13.9%).

Never	5.8%
Rarely	**32.4%**
On special occasions	3.0%
Once a month	5.4%
Once every other week	12.2%
Twice a week	8.7%
Three times a week	10.4%
Once a day	9.1%
Multiple times during the day	13.0%

12- EATING AND COOKING HABITS

WHAT KIND OF HOME COOK ARE YOU?

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

Practice makes comfortable, if not perfect. A larger majority of consumers who've spent years eating at home more since the recession now say they feel "confident in the kitchen" (56.4%). This level exceeds last year's 52.4% and 2012's 56.2%. It also represents a key opportunity for supermarkets to step up consumers from simple dishes to more challenging ones that could satisfy them more, in terms of both accomplishment and taste – and could also drive incremental sales. Perhaps classes, handouts and information on the Web could engage people willing to grow.

Asked to classify their own cooking character, consumers also describe how they: "like to experiment, create own recipes" (43.7%, up from 42.0% in 2013); are "enthusiastic" (26.5%, up from 25.5% in 2013); "follow simple recipes" (24.6%, up from last year's 24.5%); and "cook a few dishes well" (20.1%, down slightly from last year's 20.2%).

Confident in the kitchen	**56.4%**
Like to experiment, create own recipes	43.7%
Enthusiastic	26.5%
Follow simple recipes	24.6%
Cook a few dishes well	20.1%
Follow complex recipes	19.0%
Have the "magic" touch	12.7%
Tentative	3.7%
Novice	3.6%

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

Nearly three-quarters of consumers say "yes" (72.1%), we believe so they could enjoy meals more, stress less over preparation, wow their loved ones, and derive more value from foods they buy in the supermarket. This figure had dipped to 71.4% in 2013 from 75.4% in 2012. Hispanics (90.0%) and African-Americans (87.0%) want to do this, as do consumers age 24 and younger (86.5%) and 25-39 (84.3%); the largest households of four (81.6%) or five or more (84.3%); and the heaviest grocery spenders of $101+ per week (75.3%)

Yes	**72.1%**
No	27.9%

12- EATING AND COOKING HABITS

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

Nearly half of American households are cooking more (47.4%) – the percentage stays stable from last year's 47.5%, yet ebbs from the 50.9% of 2012 and 2011. Combine this with the increase in respondents who say they cook "about the same" (43.4%, up from 41.9% in 2013), and this is a massive audience supermarkets ought to court with food knowledge and quality choices. The lower the household income group, the more respondents say they cook at home more often – from 52.3% of $45,000 and under households to 43.2% of $165,001+ households. Also, the younger the respondent, the more cooking at home – from 64.9% of consumers 24 and younger to 41.3% of seniors 65 and older.

Yes	**47.4%**
No	9.2%
About the same	43.4%

IF YES, HAS THE EXPERIENCE IMPROVED YOUR COOKING SKILLS?

Consistent with answers of the past two years, three-quarters of respondents (74.4%) say they've become better cooks as a result of cooking more at home. In 2013, 71.9% said this, as did 75.3% in 2012, and just 63.0% in 2011. Hispanics (83.3%), adults from larger households of four (84.5%) or five or more (81.1%), and consumers 24 and younger (86.2%) and 25-39 (86.3%) all feel their skills have improved.

Yes	**74.4%**
No	25.6%

WILL HEALTH REFORMS AFFECT YOUR EATING HABITS?

Less than one respondent in ten (8.7%) concedes he or she will eat differently as a result of the Affordable Care Act. The majority (55.9%) anticipates no change. A nominal 1.6% anticipates less disciplined eating since health insurance will be assured.

Yes	8.7%
No	**55.9%**
Don't know	35.4%

13- NUTRITIONAL CONCERNS

WHAT CONCERNS CONSUMERS THE MOST ABOUT THE FOODS THEY EAT?

For seven consecutive years, the "desire to be healthy/eat what's good for us" leads the list of nutritional content concerns. At 19.3% (the same as last year, but down from 23.0% in 2012) this separates from the pack. It tops "chemical additives" at 16.1% (up from 15.8% in 2013 and 13.8% in 2012), and it garners nearly twice the mentions of the #3 concern, "salt/sodium content, less salt" (9.9%, up a grain from 9.8% in 2013 and 2012).

Rounding out the Top 5 are: "sugar content/less sugar" (9.3%, up from 8.4% in 2013 and 7.8% in 2012) and ""food's nutritional value" 8.3%, up from 7.1% in 2013).

Desire to be healthy/eat what's good for us	**19.3%**
Chemical additives	16.1%
Salt/sodium content, less salt	9.9%
Sugar content/less sugar	9.3%
Food/nutritional value	8.3%
Fat content, low fat	8.2%
Balanced diet	5.7%
Calories/low calorie	5.3%
Carbohydrate content	3.5%
Freshness/purity/no spoilage	3.4%
Nothing	2.0%
Cholesterol levels	1.9%
Other	1.9%
Preservatives	1.7%
Fiber content	1.4%
Don't know	0.9%
Protein value	0.6%
Vitamin/mineral content	0.5%

13- NUTRITIONAL CONCERNS

HOW CONSUMERS DESCRIBE THEIR DIET

Most Americans concede they could eat smarter. Nearly half (48.5%, down from 49.7% in 2013) say their diet "could be somewhat healthier," plus another 8.0% (down from 9.6% in 2013) say it "could be a lot healthier." The intent to eat better is there, judging by other responses throughout this survey. Yet the follow-through doesn't always happen – people lack the knowledge, tools, time or discipline to eat smartly all the time. This attitude surfaces in the one-third of consumers (32.6%, up from 29.8% in 2013 and 29.1% in 2012) who say their diet "is healthy enough."

Supermarkets could find high receptivity to nutritional guidance among respondents who often say their diet "could be a lot healthier." Among them: African-Americans (30.4%), households of five or more (16.9%), males (12.7%), and households with annual income of $45,000 or less (11.5%).

Could be somewhat healthier	**48.5%**
Is healthy enough	32.6%
As healthy as it could possibly be	10.9%
Could be a lot healthier	8.0%

13- NUTRITIONAL CONCERNS

WHAT PEOPLE EAT TO ENSURE THEIR DIET IS HEALTHY

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

Fresh, colorful foods from the supermarket perimeter are the tools of choice for people aspiring to eat healthier. A record level for this survey, three-quarters of consumers say they eat "more fruits and vegetables" (74.5%, up from 70.9% in 2013 and 70.3% in 2012).

This approaches 4x the mention of the #2 activity to eat a healthier diet, "more fresh foods" (20.2%, up from 17.5% in 2013 and 17.1% in 2012). Rounding out the Top 5: "more fiber" (16.4%, the same as in 2013, but down from 20.4% in 2012); "more fish" (14.8%, up from 12.7% in 2013); and "less prepared and processed foods" (13.9%, up from 13.3% in 2013). 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	**74.5%**
More fresh foods	20.2%
More fiber	16.4%
More fish	14.8%
Less prepared/processed foods	13.9%
Less bread	11.3%
Less junk food/snack food	11.3%
More chicken/turkey/white meat	11.2%
Less carbohydrates	10.6%
More organically grown/natural foods	9.8%
Less calories/food low in calories	8.0%
More whole grains	7.9%
Less sugar	7.4%
More balanced diet/more variety	7.1%
Less salt/sodium/food low in salt/sodium	7.0%
Less fried foods	6.5%
More water/bottled water	5.7%
Less meats/red meats	5.4%
Less soda	4.6%
More salads	4.4%
Less cholesterol/food low in cholesterol	4.4%
More protein	4.3%
More calcium	3.8%
Less fats/oils	3.2%
Less dairy products	2.4%
More foods high in vitamins/minerals	2.4%
More foods with antioxidants	1.9%
More vitamin/mineral supplements/pills	1.4%
More meat	0.9%
More juices	0.7%
More low fat or skim milk products	0.7%
More starches (pasta, beans, rice)	0.4%

14- 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

Is an item worth buying? Does it suit my budget? Nearly three-quarters of consumers (73.0%) "almost always" ask these questions as part of their decision making process for new products. This is down slightly from 75.5% in 2013 and 75.8% in 2012, but higher than the pre-recession 72.0% level. The combined figure with "sometimes" is 96.7%, which means price is on almost everyone's mind when judging a new item.

Almost Always	**73.0%**
Sometimes	23.7%
Hardly Ever	3.0%
Never	0.4%

BRAND NAMES

People tend to trust brands they know. So it makes sense that more than nine out of ten consumers (90.6%, up from 89.4% in 2013, and even with the 2012 level) make "brand name" a regular part of their new-item purchase decisions. However, equity dips slightly in 2014: the "almost always" component is 37.7%, down from 39.2% in 2013 and 37.8% in 2012.

Almost Always	37.7%
Sometimes	**53.0%**
Hardly Ever	8.3%
Never	1.0%

HEALTH CLAIMS

Aiming to eat healthier, 80.8% of consumers consider health claims "almost always" or "sometimes" when considering purchase of a new food item. This is down from 81.2% in 2013 and 84.0% in 2012. If people felt more strongly that health claims are accurate and relevant to their needs, this figure would be higher.

Almost Always	39.0%
Sometimes	**41.8%**
Hardly Ever	15.4%
Never	3.8%

14- CONSUMERS BUY A NEW FOOD PRODUCT FOR THE FIRST TIME

INGREDIENTS

Nearly all consumers (92.9%) review the contents list of a new food product before trying it out. Two-thirds (67.5%, up from 67.0% in 2013) look "almost always" to see if an item suits their health and safety threshold.

Almost Always	**67.5%**
Sometimes	25.4%
Hardly Ever	5.2%
Never	1.8%

TYPE OF PRESERVATIVES OR ADDITIVES

A healthy majority of consumers (84.7%, barely above last year's 84.6%) examine this list "almost always/sometimes." The number who do this nearly every time – 54.3% - is in the middle of the range of the past few years. The level was 54.6% in 2013, 56.2% in 2012, 59.0% in 2011, 51.0% in 2010, and 42.0% in 2009.

Almost Always	**54.3%**
Sometimes	30.5%
Hardly Ever	12.0%
Never	3.3%

ORGANIC CLAIMS

Organic food consumption occurs at a high frequency among a small but growing body of U.S. adults, this survey shows. Yet nearly two-thirds (64.3%, down from 65.3% in 2013, 68.6% in 2012, and 70.0% in 2011) say they look at organic claims on new food products "almost always/ sometimes." The new 28.5% "almost always" component is similarly below the 29.6% of 2013.

Almost Always	28.5%
Sometimes	**35.8%**
Hardly Ever	23.6%
Never	12.2%

WHERE THE PRODUCT WAS MADE

Consumers have a keen sense of which countries and regions of origin tend to generate foods of either high quality or high risk. More than three-fourths (77.0%) look at location (down a bit from 2013's 78.1%, 2012's 79.3%, and 2011's 79.0%) "almost always/sometimes" when assessing a new food product. The percentage that examine this nearly each time declines to 37.9% from 41.4% in 2013 and 41.3% in 2012.

Almost Always	37.9%
Sometimes	**39.1%**
Hardly Ever	17.8%
Never	5.2%

15- 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 reinforces its status as consumers' primary information resource for nutrition insights. For nearly two-thirds of U.S. adults who cite it (64.4%, down from 68.4% in 2013 and 72.1% in 2012), reasons are breadth of information and access wherever they are – at home on a computer planning a shopping trip, or on the go with a smartphone or tablet.

At #2, magazines edge down to 37.8% from last year's 39.4%. At #3, television slides to 16.9% from last year's 19.8%.

The biggest news is consumers' growing reliance on nutritionists and dietitians. At 16.4%, this resource advances to the #4 position on its rise from 12.4% in 2013, when it came in at #7, and 11.6% in 2012. Reasons for their ascent could include: trust in their credentials and performance; better consumer access before, during and after store trips; and personalized advice based on follow-up questions by consumers.

Friends and family (15.3%, up barely from last year's 15.2%) remain in the #5 position. They actually tie with newspapers in 2014.

Internet	**64.4%**
Magazines	37.8%
Television	16.9%
Nutritionist/dietitian	16.4%
Newspaper	15.3%
Friends and family	15.3%
Research journals	14.9%
Grocery store	12.7%
Books	11.4%
Doctor	9.3%
Other	9.1%
Online communities (e.g., iVillage, Second Life, YouTube)	8.4%
Apps	8.0%
Food ratings systems in stores, such as Nuval	4.1%
Radio	2.5%

15- NUTRITIONAL INFORMATION SOURCES

WHOM DO THEY TRUST THE MOST?

Fewer than three consumers in ten (28.4%, down from last year's 31.0%) say they trust online the most – not exactly a hearty endorsement, we think, because the Internet presents studies and other information that can conflict and confuse, and leaves unsaid reasons why entities make certain statements.

People seek credible nutritional guidance, and possibly clarity on what they read online. So they turn increasingly to nutritionists and dietitians, who are now the #2 trusted resource, cited by 15.9% of respondents, up from 11.7% in 2013 and 2012. Research journals are #3 (11.9%, up from 2013's 10.1%), followed by magazines (8.6%, up from 2013's 8.2%), and doctors (8.5%, down from 2013's 12.0%).

Internet	**28.4%**
Nutritionist/dietitian	15.9%
Research journals	11.9%
Magazines	8.6%
Doctor	8.5%
Friends and family	5.1%
Books	5.0%
Other	4.4%
Newspaper	4.1%
Television	3.2%
Grocery store	2.5%
Online communities (e.g., iVillage, Second Life, YouTube)	2.0%
Radio	0.4%

IMPORTANCE OF NUTRITIONAL RATINGS ON PACKAGES

A three-year slide in the collective "critical/very important" measure reflects consumer doubt that nutritional ratings on packages help. Without an industry standard, differing ratings systems can complicate rather than simplify purchase decisions at the shelf. The combined 2014 figure of 59.3% is less than last year's 61.2% and 2012's 68.3%. Today's 19.8% "critical" mark is lower than 2013's 22.1%, while the 39.5% "very important" mark is slightly above last year's 39.1%. The oldest and youngest age groups lead the "critical/very important" response: seniors 65 and older (71.6%) and consumers age 24 and younger (62.2%).

Very Important	**39.5%**
Somewhat Important	31.1%
Critical	19.8%
Not Important	9.7%

16- DIETITIANS

GUIDANCE EXPECTED FROM A STORE'S NUTRITIONIST/DIETITIAN

If supermarkets made consumers more aware these professionals are available, chart figures would likely be more robust. Currently, about half of U.S. adults "don't expect guidance from a nutritionist or dietitian" (51.1%, up from last year's 48.7%).

The rest of America that does use such help expects this: "General guidance on a balanced diet" (20.0%, down from 20.2% in 2013); "general guidance on foods that give good nutritional value for the dollar" (15.5%, down from last year's 16.6%); "best foods for my specific health condition" (12.0%, up from 9.9% in 2013); and "guidance towards my individual wellness goals" (11.9%, up from last year's 8.6%).

I don't expect guidance from a nutritionist/dietitian	**51.1%**
General guidance on a balanced diet	20.0%
General guidance on foods that give good nutritional value for the dollar	15.5%
Best foods for my specific health condition	12.0%
Guidance towards my individual wellness goals	11.9%
Label reading including ingredients and nutritional claims	9.5%
Foods to stay away from for my specific health condition	7.8%
How to cook certain foods	7.8%
Weight loss guidance	5.9%
Foods to go with my fitness program	4.4%
Nutritionally smart holiday entertainment ideas	4.4%
Collaborate with the pharmacist, with my permission	1.8%
Other	1.1%

16- DIETITIANS

WHICH SERVICES WOULD YOU PAY FOR?

Supermarkets could look to nutritionists and dietitians as differentiators who help customers shop smarter, and visibly support operator strategies and principles. Yet it appears it could be a long time before they drive any significant revenue. Seven out of ten consumers (71.7%, up from 71.2% in 2013) resist paying for this service.

That leaves nearly one-third of consumers who do see value they're willing to pay for. Most often, that is: "guidance towards my individual wellness goals" (10.0%, up from last year's 8.3%); "best foods for my specific health condition" (9.3%, up from 7.2% in 2013); and "weight loss guidance" (8.0%, up from 7.6% in 2013).

I am not willing to pay for this service	**71.7%**
Guidance towards my individual wellness goals	10.0%
Best foods for my specific health condition	9.3%
Weight loss guidance	8.0%
Foods to stay away from for my specific health condition	5.1%
Foods to go with my fitness program	4.4%
General guidance on foods that give good nutritional value for the dollar	3.9%
General guidance on a balanced diet	3.6%
Nutritionally smart holiday entertainment ideas	1.3%
Other	1.3%
Collaborate with the pharmacist, with my permission	1.1%

HOW WOULD YOU PREFER TO PAY?

"Fee per consult" (14.2%, up from 12.8% in 2013) is more popular than "annual fee" (8.1%, down from 10.0% last year), among the minority of respondents willing to pay for these services.

I am not willing to pay for this service	**69.4%**
Fee per consult	14.2%
It makes no diffference	8.3%
Annual fee	8.1%

16- DIETITIANS

WHAT'S A FAIR PRICE?

Consumers who are willing to pay estimate $25 or less per consult is a reasonable value.

Zero	**63.7%**
$25 or less per consult	17.1%
$26 to $50 per consult	5.8%
$51 to $100 per consult	3.3%
$100 or more per consult	0.8%
$50 or less per year	4.1%
$51 to $100 per year	2.4%
Per consult	1.4%
$101 to $200 per year	0.8%
$201 or more per year	0.4%

WHAT IF YOU RECEIVED DISCOUNTS ON CERTAIN FOODS?

Nearly four consumers out of ten (38.1%, up from 36.4% in 2013) say this tactic could move them to pay for the professional services of nutritionists and dietitians.

Yes	**38.1%**
No	33.2%
It makes no difference to me	28.7%

17- ANONYMOUS DEMOGRAPHICS

GENDER

Female	**75.8%**
Male	24.3%

WEEKLY HOURS WORKED

Full Time	**60.4%**
Retired	19.2%
Part Time	11.3%
Unemployed	6.8%
Student	1.1%
Full Time Work and Student	0.9%
Part Time Work and Student	0.4%

AGE BRACKET

50 to 64	**41.6%**
25 to 39	19.0%
40 to 49	18.6%
65 and older	17.6%
24 and younger	3.3%

ETHNICITY

Caucasian	**89.0%**
Asian	3.3%
Other	3.0%
Hispanic	2.6%
African American	2.0%

17- ANONYMOUS DEMOGRAPHICS

REGION OF U.S. OF YOUR PRIMARY RESIDENCE

East	**31.8%**
Midwest	28.4%
West	22.4%
South	17.4%

NUMBER OF PEOPLE LIVING AT PRIMARY RESIDENCE

1	20.8%
2	**42.6%**
3	16.9%
4	12.4%
5 or more	7.3%

NUMBER OF CHILDREN LIVING AT HOME

0	**66.0%**
1	16.5%
2	11.8%
3	4.4%
4	0.9%
5 or more	0.4%

17- ANONYMOUS DEMOGRAPHICS

AMOUNT SPENT EACH WEEK ON GROCERIES

$0 - $40	4.4%
$41 - $60	14.0%
$61 - $80	15.8%
$81 - $100	21.9%
$101 and over	**44.0%**

AVERAGE HOUSEHOLD INCOME

$45,001 or less	21.3%
$45,001 - $85,000	**28.1%**
$85,001 - $125,000	21.3%
$125,001 - $165,000	12.6%
$165,001 or more	16.7%

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 Newsflash 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.