Fishing the Deeper Waters: Exploration of 2015 U.S. Grocery Shopper Trends

Presented by Laurie Demeritt, The Hartman Group
FMI U.S. Shopper Trends 2015 - methodology

Qualitative:

• In-depth, one-on-one interviews with consumers from two-shopper households, with 3-hour tours of home kitchens, eating and food-storage areas, and shop-along interviews in frequented food retail locations
• Additional consumers from around the US, who completed journaling and photo-collage homework exercises prior to debriefing
• 2013-2014 Hartman Group ethnographic research into eating and shopping.

Quantitative:

• Survey fielded to n=2,265 US primary shoppers, 18+ years old
• 25-minute online questionnaire, with sample obtained via Harris Online research panel
• Split sample to cover wider range of topics, with each sub-sample n>1,100
• Additional analysis was conducted of previous FMI survey data, US Census, USDA data sets on consumer spending, health and eating, Pew Social Research reports and Hartman Group 2013-14 Compass data.
From macro trends to eating and food shopping today

The current state of the food retailing sector is a reflection of long-term fundamental changes in the way Americans eat and procure food.

- Today’s eating and shopping behaviors are inexorably linked and exist within the context of modern food culture
- Modern food culture, which influences and prioritizes when, where, what, and (with) who(m) we eat and drink, in turn is a reflection of long-term economic, social, and cultural forces shaping America
How we eat today is changing

**Occasion-based meals and snacks**
- Eating alone (47% of eating occasions)
- 50% meals/50% snacks
- New occasions: pre-breakfast snack, late night meal

**On-demand, planned spontaneity**
- 63% of eating occasion food choices are decided within an hour of consumption
- 30% of the top 25 supermarket growth categories are in the chilled or perishable categories (fresh “fast” food)

**Variety and customization (by dietary concerns, cuisines)**
- 55% of families cook multiple meals/dishes to cater to individual taste preferences
- 13% of all eating occasions include an emerging global food

**Cook less or cook more, depending on the occasion**
- 77% of all eating occasion involve at least some prepared food

“My roommates and I, we don’t share food...we’ve had family meals together maybe three times in the last six years that we’ve been rooming together.”
How we procure food today is changing

“*My phone is an easy button. I can order food, get service, give feedback... because companies can track me. I can pay with my phone.*”

More democratically within the household

- Many households now have both adults buying food regularly
- Within households with children, children are becoming “co-shoppers”

More democratically outside the household

- More than 50% of grocery shopping “trips” involve going to 2+ stores
- 71% of consumers visit 5+ retail channels at least once a month for food
- We utilize the roadside or online “pantry” rather than stocking up the home pantry
- The lines between food retail and food service are blurred in the minds of consumers and are likely to entirely disappear in the near future
Diversification of the primary store

Supermarkets as a primary store show no sign of rebounding to prior levels, but no single other channel is stealing that share.

The number of consumers who indicate “no primary store” is striking.

Discount, limited assortment and organic/specialty stores are all under 6%.

Channel of Primary Store

- **Supermarket**: 67% (2005), 56% (2011), 54% (2014), 52% (2015)
- **Supercenter**: 22% (2005), 28% (2011), 22% (2014), 23% (2015)
- **Warehouse**: 7% (2005), 5% (2011), 5% (2014), 6% (2015)
- **No Primary Store**: 2% (2005), 9% (2011), 9% (2014), 9% (2015)
The shopper base has broadened

More people are having a larger role in grocery shopping.

- **83%** of all U.S. Adults say they have at least 50% of the household responsibility for grocery shopping.

- Gender of the primary shopper is nearing a 50/50 split:
  - **Female**: 57%
  - **Male**: 43%

- **More people claim to be “Primary shoppers” than there are households**:
  - **123 Million** U.S. Households
  - **203 Million** “Primary Shoppers”
The surplus of shopping “credit” is most acute in households with children

Percent who say they are the primary decision makers and shopper when it comes to groceries

<table>
<thead>
<tr>
<th>All couple households</th>
<th>All couple households with children under age 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>56%</td>
<td>92%</td>
</tr>
<tr>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>8%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Secondary shopper

Shared shopper, no primary shopper

Primary shopper and decision maker
Reorganization of household roles means decentralized, shared shopping

Underlying the shift in “Primary shopper” roles is a deeper shift in how households manage food, moving away from a Primary Shopper Paradigm and towards a Shared Shopper Paradigm.

Due to this shift, we see....

1) A broadening of the shopper base but a narrowing of trip missions
2) A complex variety of household food strategies leading to increased shopper heterogeneity; even “new” shoppers aren’t all alike
3) Retailer opportunities are shaped by household-level differences in specialization and communication
Generational transformation in how food shoppers plan

Millennials are the least likely to make shopping lists

Millennials are also the least likely to plan ahead

When do you typically make a shopping list?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Throughout the week in between trips as items run out</th>
<th>Some other time</th>
<th>Right before going to the store</th>
<th>% Shoppers who make shopping lists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials 18-36</td>
<td>40%</td>
<td>2%</td>
<td>30%</td>
<td>72%</td>
</tr>
<tr>
<td>Gen X 37-50</td>
<td>46%</td>
<td>1%</td>
<td>28%</td>
<td>75%</td>
</tr>
<tr>
<td>Boomers 51-69</td>
<td>53%</td>
<td>2%</td>
<td>25%</td>
<td>80%</td>
</tr>
<tr>
<td>Matures 70+</td>
<td>58%</td>
<td>5%</td>
<td>16%</td>
<td>79%</td>
</tr>
</tbody>
</table>
Females engage in more planning behavior prior to the trip

Planning prior to grocery shopping

- I take inventory of what I need: 59% (men) vs. 65% (women)
- I always make a list before visiting store: 48% (men) vs. 60% (women)
- I check store circulars/flyers for specials or coupons: 47% (men) vs. 56% (women)
- I ask other people in my household what they need: 33% (men) vs. 43% (women)
- I plan menus for the week: 24% (men) vs. 31% (women)
- I find online/digital coupons to use: 22% (men) vs. 32% (women)
- I plan out my shopping budget: 21% (men) vs. 27% (women)
- I refer to cookbooks, magazines or online recipes for ideas: 15% (men) vs. 27% (women)
- I check my emails for any promotions: 16% (men) vs. 23% (women)
- I check prices online: 16% (men) vs. 16% (women)
- I check my loyalty/rewards points: 10% (men) vs. 15% (women)
- I use a shopping app: 5% (men) vs. 9% (women)
- I don’t plan – I just go to the store whenever I need something: 10% (men) vs. 6% (women)
Trip missions have narrowed

Shared shopping means fewer trips reported per shopper

Average weekly shopping trips to grocery store by primary shopper

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>2.2</td>
</tr>
<tr>
<td>2006</td>
<td>2.1</td>
</tr>
<tr>
<td>2007</td>
<td>1.9</td>
</tr>
<tr>
<td>2008</td>
<td>1.9</td>
</tr>
<tr>
<td>2009</td>
<td>2.0</td>
</tr>
<tr>
<td>2010</td>
<td>2.1</td>
</tr>
<tr>
<td>2011</td>
<td>1.7</td>
</tr>
<tr>
<td>2012</td>
<td>2.2</td>
</tr>
<tr>
<td>2013</td>
<td>1.7</td>
</tr>
<tr>
<td>2014</td>
<td>1.7</td>
</tr>
<tr>
<td>2015</td>
<td>1.6</td>
</tr>
</tbody>
</table>

Shared shopping requires more coordination, before and during, in order to ‘never waste a trip.’

The Greek yogurt wasn’t on the list. It’s just something I added. I’ve added a few things to the list. The Greek yogurt, the gluten free bread I added, and then the pears, are all not on the list. The bread I know that our son still eats that type, and I chose it because I read it’s the healthiest you can get. And I know that we’re out of bread at home.

- Jesse, Male, 31
Changes in food shopping responsibility are driven by changes in food prep responsibilities

Role in *COOKING* drives role in *SHOPPING*

- **I have ALL or MOST of the responsibility for preparing dinner**
  - 76% Primary shopper
  - 13% Secondary shopper
  - 19% Shared shopper

- **I share at least 50% responsibility for preparing dinner**
  - 55% Primary shopper
  - 39% Secondary shopper
  - 17% Shared shopper

- **Someone else has all or most of the responsibility for preparing dinner**
  - 48% Primary shopper
  - 26% Secondary shopper
  - 7% Shared shopper

**More men are cooking**

Average daily participation in cooking

- **1975**
  - Men: 29%
  - Women: 88%

- **2008**
  - Men: 42%
  - Women: 68%

**In the past 30 years, men have nearly tripled their contribution to household cooking**

Percentage of all time spent cooking

- **1975**
  - Men: 89%
  - Women: 11%

- **2008**
  - Men: 70%
  - Women: 30%
In an emerging Shared Shopper Paradigm, stores must understand households, not just individual shoppers.

**PRIMARY SHOPPER PARADIGM**

*Do or Delegate*

**Delegation** enabled by
- Clear roles
- Routine eating
- CPG brand loyalty

**SHARED SHOPPER PARADIGM**

*Split or Sync*

**Syncing** enabled by
- More robust communication within household
- Lower risks of experimentation with brands
  - More trust in store as curator

**IMPLICATIONS FOR STORES**

Shopper specialization is common
- Specialization is aligned with how people eat – personal needs and preferences
- Specialization by eating occasion is common – weekday vs. weekend, snacks vs. meals, etc.

Understanding individual shoppers hinges on understanding their role and responsibilities within their household

To support and develop relationships with households, stores must facilitate individual shoppers’ efficiency while encouraging discovery.
Families with kids lean on fast food despite their belief that these restaurants hinder their wellness goals

<table>
<thead>
<tr>
<th>DINNERS EATEN AWAY FROM HOME, PER WEEK</th>
<th>1.1</th>
<th>1.1</th>
<th>1.5</th>
<th>1.2</th>
<th>1.0</th>
<th>0.7</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHEN YOU DO, WHERE DO YOU USUALLY GO?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-family</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families with kids</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Older families, no kids</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Older non-family</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-service restaurant</td>
<td>55%</td>
<td>47%</td>
<td>65%</td>
<td>49%</td>
<td>69%</td>
<td>45%</td>
</tr>
<tr>
<td>Fast-food restaurant/drive-thru (net)</td>
<td>31%</td>
<td>33%</td>
<td>23%</td>
<td>39%</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>Diner or coffee shop (net)</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>At work, brought from home</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Prepared food section from the supermarket</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

FAST FOOD RESTAURANTS ARE ‘WORKING AGAINST ME’ WHEN IT COMES TO HEALTH

57%  58%  68%  63%  55%  49%
It’s not just convenience; the need for variety and taste discovery leads to away-from-home meals

**YOUNGER FAMILIES, NO KIDS, EATING DINNER AS COUPLE**

13% I wanted something different to eat  
34% It was important that the food taste better than the old ‘status quo’  

More likely to eat Away From Home  
2.6x  
1.5x

**HOUSEHOLDS WITH CHILDREN, EATING DINNER TOGETHER AS FAMILY**

14% I wanted something different to eat  
40% It was important that the food taste better than the old ‘status quo’  

More likely to eat Away From Home  
2.0x  
1.7x
When it comes to eating healthy at home, consumers trust food retailers to be their wellness allies

US Consumers need and want to eat better
- 70% say the food they eat is as not as healthy as it could be
- 92% of consumers say eating at home is healthier than eating out

For food retailers and manufacturers, meeting the needs of people eating at home is the key to business
- Consumers trust food retailers to be their wellness allies
- Retailers enjoy broader trust than manufacturers or government agencies

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

<table>
<thead>
<tr>
<th>Working against me</th>
<th>Working for me</th>
</tr>
</thead>
<tbody>
<tr>
<td>My family</td>
<td>4%</td>
</tr>
<tr>
<td>Doctors</td>
<td>6%</td>
</tr>
<tr>
<td>My friends</td>
<td>3%</td>
</tr>
<tr>
<td>Farmers</td>
<td>4%</td>
</tr>
<tr>
<td>Fitness/health clubs</td>
<td>6%</td>
</tr>
<tr>
<td>My &quot;primary&quot; food store</td>
<td>6%</td>
</tr>
<tr>
<td>Drug stores</td>
<td></td>
</tr>
<tr>
<td>Local restaurants</td>
<td>11%</td>
</tr>
<tr>
<td>Health insurance companies</td>
<td>26%</td>
</tr>
<tr>
<td>Food stores in general</td>
<td>13%</td>
</tr>
<tr>
<td>Government institutions</td>
<td>34%</td>
</tr>
<tr>
<td>The news media</td>
<td>26%</td>
</tr>
<tr>
<td>Celebrity chefs</td>
<td>16%</td>
</tr>
<tr>
<td>Food manufacturers</td>
<td>41%</td>
</tr>
<tr>
<td>The entertainment industry</td>
<td>33%</td>
</tr>
<tr>
<td>Fast food restaurants</td>
<td>57%</td>
</tr>
</tbody>
</table>
GMO avoidance is currently more about minimally processed foods than about health

Seeking “non-GMO” is the single strongest indicator of an underlying interest in minimal processing, cued by an array of alternative claims such as “Certified organic” or “No preservatives.”

Claim patterns identified via factor analysis

- Good fiber
- Avoid negative ingredients
- Signs of minimal processing
- Heart health
- Positive nutrition

Red boxes indicate that change in results between 2014 and 2015 are statistically significant at p<.05.
A growing number of consumers are intentionally avoiding GMOs

What are shoppers currently doing about GMOs?

- One-fourth look for non-GMO, three-quarters do not

How do GMOs sound to them?

- After hearing a brief description, an additional one-fifth of shoppers said they “would avoid” GMOs
- In sum, then, almost half (45%) of shoppers say they would avoid GMO’s
In a substantial shift over the past five years, shoppers now tend to rely on a broader array of parties responsible for food safety.

Shoppers have long reported a role for “government institutions” about as frequently as for food manufacturers or food stores. However, in 2015, when shoppers were asked about specific, individual agencies, FDA and USDA, they revealed that they rely on these institutions more than anyone else, aside from themselves.

Who to Rely on To Ensure What is Bought at Grocery is Safe

- Myself as an individual
- Food manufacturers
- Government institutions
- Food stores
- Consumer groups
- Farmers

- 55% (2009) to 64% (2015) for Myself as an individual
- 33% (2009) to 41% (2015) for Food manufacturers
- 32% (2009) to 34% (2015) for Government institutions
- 25% (2009) to 23% (2015) for Food stores
- 12% (2009) to 17% (2015) for Consumer groups
- 8% (2009) to 10% (2015) for Farmers

FDA and USDA introduced in 2015 survey.
Shoppers generally trust food retailers to provide safe food

Overall, there is relatively high confidence in the food supply found at grocers. This level of basic confidence has remained consistent over the past ten years.

“**I TRUST** my grocery store to ensure that the food I purchase is safe”

93% of Shoppers trust their grocery store to ensure safe food products (compared to 91% in 2014)
Shoppers have a variety of concerns when it comes to the safety of their food

Just about all consumers have incorporated some set of best practices for keeping food safe at home.

Older consumers worry about contamination before food gets home, younger consumers often implicate their own behaviors.

Perceived Health Risks

- **Contamination by bacteria or germs**: 75% (Total), 75% (Millennial), 73% (Gen-X), 76% (Boomer), 80% (Mature)
- **Food handling in supermarkets**: 43% (Total), 47% (Millennial), 35% (Gen-X), 43% (Boomer), 47% (Mature)
- **Eating food past the "use by" date**: 38% (Total), 42% (Millennial), 39% (Gen-X), 35% (Boomer), 31% (Mature)
- **Eating food past the "sell by" date**: 30% (Total), 32% (Millennial), 30% (Gen-X), 30% (Boomer), 30% (Mature)
- **Eating food past the "best by" date**: 29% (Total), 32% (Millennial), 27% (Gen-X), 31% (Boomer), 23% (Mature)
Almost all consumers put the burden for consuming nutritious foods on themselves

Shoppers believe their diet “COULD BE HEALTHIER” ... especially among millennials

Most shoppers hold themselves primarily responsible for their health... but also rely on partners to make sure their food is NUTRITIOUS
Consumers are customizing their diets to meet a variety of conditions and preferences

30% of Shoppers participated in some kind of specialized approach to eating in the past 12 months

<table>
<thead>
<tr>
<th>Q: Which of these approaches to eating have you used in the past 12 months? (n=320)</th>
<th>Total (30% shoppers)</th>
<th>Millennials (38%)</th>
<th>Gen-X (25%)</th>
<th>Boomers (26%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vegetarian</td>
<td>26%</td>
<td>31%</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Lactose-free</td>
<td>23%</td>
<td>19%</td>
<td>13%</td>
<td>35%</td>
</tr>
<tr>
<td>Gluten-free</td>
<td>21%</td>
<td>24%</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Dairy-free</td>
<td>19%</td>
<td>20%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Seek raw/living foods</td>
<td>17%</td>
<td>15%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Juice cleanse/detox</td>
<td>13%</td>
<td>16%</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Weight Watchers</td>
<td>12%</td>
<td>13%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Atkins Diet</td>
<td>12%</td>
<td>14%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Mediterranean diet</td>
<td>11%</td>
<td>13%</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Paleo</td>
<td>9%</td>
<td>15%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Vegan</td>
<td>8%</td>
<td>12%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Religious dietary restriction</td>
<td>6%</td>
<td>6%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>South Beach diet</td>
<td>4%</td>
<td>2%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Jenny Craig</td>
<td>3%</td>
<td>6%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>NutriSystem</td>
<td>2%</td>
<td>3%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Beyond basic criteria, shoppers are looking for stores which support a variety of economic and social values

**Importance of grocery store attributes**

- Good Value: 72%
- Convenience: 55%
- Hygiene & Cleanliness: 45%
- Large Selection of Products: 42%
- Supporting Local Economy: 29%
- Supporting US Economy: 25%
- Employment Practices: 25%
- Animal Welfare: 21%
- Local Community Involvement: 19%
- Fair Trade: 17%
- Store Sensory Appeal: 16%
- Natural Agricultural Methods/Practices: 15%
- Maintain Natural Resources: 15%
- Environmental Impact of Disposal: 13%
- Minimal/Ecofriendly Packaging: 13%
- Air and Water Pollution: 12%
- Wider Community Involvement: 10%

Source: The Hartman Group, Transparency 2015. “Which of the following attributes of a GROCERY STORE make it more likely that you’ll shop there? (select all that apply)” Shoppers n=1,701.
Online retail still a small channel for grocery items

Percentage of shoppers who have used an online channel for groceries within the past 30 days, by generation

<table>
<thead>
<tr>
<th>Generation</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Millennials (18-36)</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Gen-X (37-50)</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Boomers (51-69)</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Mature (70+)</td>
<td>7%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Online grocery shopping is much more popular among millennials, who are twice as likely to shop online for groceries than other generations.

Frequency of online grocery orders in an average month among users

- About once a month: 31%
- About once every two weeks: 13%
- Once a week: 4%
- More than once a week: 2%
- Fewer than once a month: 50%

Most online shoppers place orders fairly infrequently – 50% of shoppers who use online channels admit to placing orders less than once a month.
Snacks and non-perishables categories continue to top the list of items purchased online

<table>
<thead>
<tr>
<th>Top categories purchased through online grocery within the past 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Snacks (chips, crackers, nuts, etc.)</strong></td>
</tr>
<tr>
<td>Health and beauty care products (shampoo,...)</td>
</tr>
<tr>
<td>Paper products, such as paper towels or napkins</td>
</tr>
<tr>
<td>Beverages (soft drinks and juices)</td>
</tr>
<tr>
<td>Household cleaning products</td>
</tr>
<tr>
<td>Canned goods (vegetables, fruits)</td>
</tr>
<tr>
<td>Breakfast cereal</td>
</tr>
<tr>
<td>Pasta and rice</td>
</tr>
<tr>
<td>Natural/Organic (NET)</td>
</tr>
<tr>
<td>Meat or poultry</td>
</tr>
<tr>
<td>Pet products</td>
</tr>
<tr>
<td>Frozen food</td>
</tr>
<tr>
<td>Produce (fresh fruits and vegetables)</td>
</tr>
<tr>
<td>Non-prescription drugs</td>
</tr>
</tbody>
</table>

40% of Millennials who shop online are purchasing NATURAL AND ORGANIC products online

- 20% Gen-X
- 16% Boomer
- 8% Mature

Source: FMI U.S. Grocery Shopper Trends, 2015. c33: “Which, if any, of these types of grocery items have you ordered online during the past 12 months?” Shoppers using online channel n=212.
Final thoughts

• Because of the rapid pace of socio-cultural changes happening in society today, how consumers plan, shop and consume food is evolving

• The diversification of the primary store speaks to the consumer desire for increased channel exploration as well as the customization of diets and eating occasions

• Because most multi-adult households have some form of shared shopping taking place today retailers should:
  ▪ Market to households and individuals within it, not shoppers as a homogeneous group
  ▪ Try to uncover various roles and responsibilities within the household and help consumers coordinate tasks
  ▪ Align CRM resources against this new reality

• Retailers continue to be seen as highly trusted sources of information on health and food safety, but consumers do not necessarily look to them for “education” – they look to them for inspiration and curated solutions

• Retailer success will increasingly hinge on understanding what is happening at a household level with regard to shopping responsibilities, eating occasions, customization of diets/preferences and the new consumer interpretation of wellness