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Trends

CONSUMER ATTITUDES & THE SUPERMARKET

FMI

TRENDS 92

CONSUMER ATTITUDES & THE SUPERMARKET 1992

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members—food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion—more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 250 members from over 60 nations.

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INTRODUCTION

This study is the 21st in a series of consumer attitude surveys conducted by the Food Marketing Institute. Designed to identify the changing needs and priorities of the American consumer, *Trends—Consumer Attitudes and the Supermarket 1992* continues to explore core issues from previous years, while looking into new areas that are presently affecting shoppers and are likely to affect them in the future. The survey is conducted in January of each year.

The 1992 *Trends* continues to explore the areas of general shopping behavior, food safety and nutrition that have been investigated in previous years. Wherever possible, comparisons are made with previous year's findings. These topics include:

- Expectations and evaluations of supermarket performance.
- Consumer expenditures in supermarkets and methods by which shoppers try to save money.
- Ways of economizing.
- Frequency of trips to the supermarket, as well as store switching.
- Store products and services.
- Consumer attitudes toward nutrition.
- Consumer attitudes toward food safety.
- Consumer activism.
- Whom shoppers believe should be responsible for ensuring that products are environmentally safe and friendly.

For the first time, the survey asked shoppers about private label and store brands. In the methodology section of this report is a demographic profile of the total sample.

Study Design

The data for this survey are based on telephone interviews with a representative, nationwide sample of 2,000 male and female supermarket shoppers. Shoppers were randomly assigned to one of two versions of the questionnaire: Shopping Habits; or Food Safety/Nutrition. This was done to shorten the length of the interview. Unless otherwise noted, questions were asked of only 1,000 shoppers. The survey was conducted in January 1992.

In keeping with the 1991 *Trends* survey, data were not weighted to an 80 percent female and 20 percent male ratio. Rather, unweighted data are used throughout the report.

A Note on the Tables

Directly beneath the title of each table is a description of the base—that is, the group of respondents for each question. The exact number of respondents in this base group, either in total or for shopper categories, is provided as appropriate. The percentages in each table are calculated using this base number. It should be noted that these percentages may not add up to 100 due to rounding or the acceptance of multiple responses. In all comparisons among categories surveyed in 1992, any differences are statistically significant. For year-to-year comparisons, whether for types of consumers or totals, changes are simply noted and are not subject to statistical comparison, unless otherwise noted.

For some tables, the response categories are presented both separately (e.g., very important somewhat important) and combined (e.g., very important or somewhat important). In some instances, the separate percentages may not add up to the combined ones due to rounding.

For each table the wording of the question appears as it was asked. Any changes in wording from previous years are noted in the table.

SURVEY HIGHLIGHTS

The economy is foremost on shoppers' minds. When asked to name the single most important issue facing our country today, nearly half of all shoppers cite an economic issue. Three out of 10 (28 percent) name unemployment—more than four times the percentage who cite any other issue.

All other issues, economic or otherwise, are cited by fewer than one in 15. Most prominent among these are the recession, protection of the environment and homelessness (6 percent each); healthcare costs, inflation and the breakdown of the family unit (5 percent each); and drugs, the budget deficit, poverty, a corrupt, wasteful government and education (4 percent each).

WHAT SHOPPERS BELIEVE TO BE THE SINGLE MOST IMPORTANT ISSUE FACING OUR COUNTRY TODAY

Q: *Now, turning to another subject, I would like you to think about the problems facing our country today. What do you think is the single most important issue facing our country today?*

Base: The shopping public

	Jan 1992 Total*
Base	2,000
	%
Unemployment	28
Recession	6
Protection of the environment	6
Homelessness	6
Healthcare costs	5
Inflation/high cost of living	5
Breakdown of family unit/lack of morals/religious faith/values work ethic	5
Drugs	4
Budget deficit	4
Poverty	4
The government (corrupt/wastes money/does not help people)	4
Education	4
Economy/trade deficit	3
Crime	3
AIDS	3
Taxes	2
Racism/discrimination/equal rights	1
Disposal of waste	1
Other	1
Don't know	4

*May not total 100 percent due to rounding

Methods of Economizing and Consumer Expenditures in Supermarkets

■ Consumer concerns about the economy carry over into their shopping behavior. Price is growing in importance relative to safety and nutrition when individuals shop for food. Money-saving specials and private label or store brands play a more important role in a shoppers' evaluation of their principal supermarket. Economizing behaviors are widespread. Shoppers are increasing the frequency with which they use price-off coupons, advertised grocery specials, price comparisons and stocking up. They also stretch their food dollar by doing more meal planning, finding a use for leftovers and foregoing luxury or gourmet items and convenience foods.

■ Weekly family grocery expenditures are on a par with last year, averaging $78. Per-person expenses of $30 are down $2 since 1991.

■ Three out of four shoppers (75 percent) now rate price as very important when shopping for food (from 71 percent in 1991). The increased emphasis on price reflects the larger number of shoppers who want their supermarket to provide "items on sale or money-saving specials" (up three points to 91 percent).

■ Shoppers search for ways to economize more so than in the past. On nearly every shopping trip, at least two in five shoppers now look in the paper for specials (up eight points to 45 percent) or use price-off coupons (up seven points to 43 percent). Two other economizing measures are used more: stocking up on bargains (up six points to 30 percent) and comparing prices at different supermarkets (up five points to 25 percent). Despite club stores' claims of lower everyday prices, few shoppers regularly economize by shopping at places like B.J.'s, Costco, Sam's or Price Club (2 percent).

■ Shoppers use a variety of measures to reduce actual grocery expenditures or to decrease waste at home. To save at the supermarket, more than half use price-off coupons (61 percent) or buy fewer luxury (58 percent) or convenience items (51 percent). Consumers stretch their food dollar by doing more with leftovers (60 percent) and expanding meal planning (45 percent). Another one out of two save money by eating fewer meals out (52 percent).

■ One way shoppers can economize is through buying private label or store brands, rather than more expensive nationally advertised brands. Shoppers recognize this and place greater importance on store brands when evaluating their principal supermarket (up 10 points to 65 percent). Store brands are widely available (95 percent report that their supermarkets carry them). One out of five shoppers (18 percent) say they buy these items pretty much every time they shop, and 82 percent say they purchase them at least once a month.

Overall, the majority of shoppers equate the quality of store brands to that of national brands (61 percent), although one in three view store brands as inferior (30 percent). One in four (24 percent) believe store brands are better than national brands, particularly for canned goods and paper products.

■ In keeping with last year, about one in five shoppers can be classified as a "heavy economizer" (those who practice at least five economizing measures). Heavy economizers are likely to be female, married and living in one-income households. They are young (under age 25) and live in large households with children. While the average weekly grocery expenditure of $81 is above the $78 reported for all shoppers, they spend $3 less per person than others ($27 vs. $30).

Warehouse Club Shoppers

The price appeal of warehouse club stores during the current recession is evidenced by the fact nearly half of all supermarket shoppers (47 percent) have made at least one visit to such a store. About one in 10 visits a warehouse club store at least fairly often for groceries and more than one in three consumers shops this format on an occasional basis (36 percent). Compared with non-club shoppers, those who shop at clubs are more affluent, living in dual-income households of three or more persons.

Warehouse club shoppers do not limit their shopping to one store and are far more likely to use a discount or warehouse store for grocery items (88 percent vs. 34 percent of non-club shoppers). Consistent with the greater availability of large or institutional sized products in club stores and the larger households for whom they shop, club shoppers economize more often than others by buying in quantity (49 percent vs. 33 percent) and doing more meal planning (49 percent vs. 42 percent).

The majority of club shoppers rate the quality of store brands on a par with nationally advertised brands (57 percent). A larger proportion of club shoppers, however, rate store brands as inferior to national brands (34 percent vs. 28 percent of non-club shoppers) and fewer club shoppers economize by purchasing store or lower-priced brands (16 percent vs. 21 percent of non-club shoppers).

Expectations and Evaluation of Supermarket Performance

■ Shoppers continue to be pleased with the job their supermarket is doing. The average rating of 7.9 on a scale of one to 10 (where one means poor and 10 means excellent) has held constant since 1988.

■ A clean, neat store, an attribute added this year, now ranks above quality produce as foremost in importance. When evaluating their principal supermarket, comparable majorities of shoppers (at least 95 percent) continue to place importance on good variety and wide selection, low prices, courteous and friendly employees, quality meat and a convenient location. In a change from last year, more shoppers now value readable and accurate shelf tags and items on sale or money-saving specials. Consumer concern over the economy also is reflected in the greater number who attach importance to private label or store brands (up 10 points to 65 percent).

Supermarkets receive favorable performance evaluations on key items—including their highest rating on the most important one: a clean, neat store (92 percent rate this as good or excellent). At least nine in 10 also are satisfied with the convenient location and variety. At least four out of five also rate as good or excellent quality produce, courteous friendly employees, fresh food sections like a deli or bakery, convenient store layout, quality meat, and items on sale or money-saving specials.

■ Supermarkets appear to be responding to consumers concerns about the economy. Significantly more shoppers now rate their supermarket good or excellent on providing sale items or money-saving specials (up five points to 83 percent) and good, low prices (up eight points to 73 percent).

Shopping Habits and Behavior

■ Shoppers continue to average just over two trips to the supermarket per week.

■ Customers remain loyal to their primary supermarket (72 percent), although economic concerns may force changes. For the first time ever, concern over better or lower prices (39 percent) is a greater force behind store switching than a convenient location (31 percent). More variety and selection remains a key reason for changing supermarkets (25 percent). Shoppers now appear to be focusing on service attributes such as employee attitude and competence (8 percent) and store cleanliness (7 percent).

■ Fast-food restaurants dominate all other outlets as a source of takeout food (55 percent). About one in four consumers continue to order food from restaurants (24 percent) and one in eight buy takeout from a supermarket (12 percent). The proportion who use a supermarket for carryout food is down by two percentage points from 1990 and 1991 levels.

Store Products and Services

■ Supermarkets appear to be anticipating shoppers' needs for new products and services. Products that are the most widely available also are the ones that are used most often. Products with limited availability are not only used less often when they are available, but are not likely to be used with any great frequency at supermarkets that carry them.

Nearly all supermarkets offer shoppers food products designed especially for the microwave (95 percent), private label or store brands (95 percent) and a deli or other carryout foods (87 percent). Availability of these top three items remains unchanged since 1991. Other items with widespread availability include gourmet or specialty foods (73 percent), a floral department (69 percent) and unpackaged or bulk food (61 percent). Of these items, only bulk foods are available to more shoppers in 1992 than in 1991 (up 10 percentage points).

■ A larger proportion of shoppers say their supermarkets offer videos or movies for rent (51 percent) than for sale (40 percent). With reported penetration of 41 percent, prescription drug counters are now more widely available than they were two years ago (30 percent). Benchmark data indicate that one out of three shoppers' supermarkets accept credit cards for payment (33 percent).

■ On a weekly basis, shoppers are most likely to purchase private label or store brands (51 percent), microwave food products (33 percent), unpackaged or bulk food (29 percent) and deli items (28 percent).

■ Among shoppers whose supermarket does not carry a particular product or service, about three out of 10 shoppers would potentially use three products on a weekly basis: private label or store brands (31 percent); microwave food products (29 percent) and deli or carryout items (28 percent).

Consumer Activism

■ Consumer activism is at its highest level ever. However, activities in the 1990's involve primarily personal decisions rather than the organized group action more popular in the 1970's. Economic concerns drive consumers to take action: 90 percent have refused to buy products that cost too much, up from 84 percent last year. About half have refused to buy a product for two other reasons: disagreement with manufacturers' policies (53 percent) and possible unethical treatment of animals (46 percent).

■ Consumers place nearly equal responsibility on manufacturers or food processors (33 percent) and government institutions or agencies (29 percent) to ensure that the food and nonfood products they buy in their supermarket are environmentally safe and friendly. Slightly more than one in 10 rely on their food store (12 percent). Compared with last year, shoppers rely more on government agencies and food stores, but less on themselves and consumer organizations.

Nutrition

■ Shoppers continue to be dissatisfied with the healthfulness of their own diet. Two out of three (66 percent) believe that their diet could be at least somewhat healthier, and only one in 10 (11 percent) say it is as healthy as possible. Eating more fruits and vegetables is the predominant approach to keeping a diet healthy (60 percent). About three in 10 say they eat less red meat (31 percent) or consume less fats and oils (28 percent).

■ Shoppers use somewhat different mechanisms today than a year ago to eat healthy. The number who directly reduce their cholesterol intake continues to decline (down four points to 8 percent), although more consumers are reducing their consumption of cholesterol-rich foods, such as dairy products (up three points to 7 percent) and snack foods (up eight points to 12 percent). Significantly fewer now reduce sugar (down seven points to 12 percent) or eat more fiber (down eight points to 8 percent) or fish (down four points to 10 percent).

■ Nutrition remains second only to taste when shopping for food. Nearly all shoppers believe it is at least somewhat important (96 percent).

■ Nutritional concern is now significantly above levels reported every year since 1985. Nearly two out of three consumers are now very concerned about the nutritional content of the foods they eat (up eight points to 64 percent). Specific concerns are related to the perceived hazardousness and healthfulness of items. Fat content (50 percent) and cholesterol levels (30 percent) continue to be the biggest concerns. These are also considered the two most serious health hazards: fats (58 percent) and cholesterol (52 percent).

Concerns over fat are at an all-time high and are reflected in changes in the way shoppers prepare foods. They fry less, use less added fat and broil more. Consuming less fats and oils also is the third most frequently mentioned way consumers ensure a healthy diet.

Consistent with the declining number of shoppers who say they are reducing their cholesterol intake, cholesterol levels are of concern to significantly fewer shoppers today than a year ago (down seven points to 30 percent) and are viewed as a serious health hazard by fewer (down six points to 52 percent). Concerns about vitamin and mineral content and a desire to eat what's good and healthy also are less prevalent in 1992.

■ Two out of three shoppers (65 percent) have been cooking or preparing foods differently than they did three to five years ago — up from 61 percent. Consumers fry less (44 percent) and use less added fat (27 percent). Each of these behaviors have increased in the last two years. Compared with three years ago, significantly fewer shoppers say they use less salt, less cholesterol or eat less red meat. Microwaving foods is now less prominent and steaming foods is more so.

■ As in the past, shoppers assume primary responsibility for food nutrition (39 percent). Maintaining the trend first noted last year, shoppers rely less on the government (14 percent) and more on manufacturers (27 percent) to ensure that the products they buy are nutritious. Fewer than one in 10 rely on food stores.

Consumer Attitudes Toward Food Safety

Shopper confidence in the safety of the food supply is near its historical low. After the record high in January 1991 (82 percent), confidence plunged to 72 percent. This is the lowest level since mid-1989, following the Alar and Chilean grape incidents.

■ Lack of confidence in food safety appears to be related to concerns about food spoilage. Spoilage remains the most frequently volunteered threat to food safety and is mentioned significantly more often than in 1991 (up nine points to 36 percent). Coincident with this is increased concern over product freshness, shelf life and expiration dates (up six points to 12 percent); processing and food preparation (up seven points to 10 percent); quality control or improper shipping and handling (up four points to 9 percent); and contamination from bacteria (up six points to 9 percent). Germ-related spoilage remains the third most frequently named threat (15 percent), after pesticides and residues (18 percent).

■ Notwithstanding the drop in confidence about food safety, the importance shoppers place on product safety remains unchanged (71 percent).

■ Residues such as pesticides and herbicides continue to be rated the preeminent health hazard, although the proportion of shoppers who say it is a "serious" hazard declined (down four points to 76 percent). Antibiotics and hormones in poultry and livestock is considered a serious hazard by one in two (53 percent). In a marked change from the past three years, significantly fewer 1992 shoppers view irradiated foods as a serious hazard (down seven points to 35 percent).

■ Responsibility for food safety has not changed in the past year. Consumers place the most faith in their own ability to ensure the safety of the foods they buy (40 percent). About half as many rely on either the government (21 percent) or manufacturers (20 percent). Only a small number feel it is up to food stores (9 percent).

WE ADDED A NEW ATTRIBUTE TO OUR LIST THIS YEAR: THE IMPORTANCE OF CLEAN, NEAT STORES. EVERYONE IN OUR SURVEY LISTED THEM AS IMPORTANT TO THEM."

CHAPTER 1

HOW CONSUMERS VIEW THE SUPERMARKET

EXPECTATIONS AND SUPERMARKET PERFORMANCE

When evaluating their primary supermarket, shoppers place the greatest importance on a clean, neat store and quality produce. Shoppers are consistent in the criteria they use to evaluate a store. As in earlier years, good variety or wide selection, good, low prices, courteous, friendly employees, and good quality meat remain at the forefront (see Table 1).

Compared with prior years, shoppers place greater importance on three areas.

■ Shoppers continue to be cost conscious. The percentage who attach importance to items on sale or money-saving specials increased significantly for the second straight year and is now at an all-time high (91 percent). Cost consciousness also is evident in the greater number who want their supermarket to provide private label and store brands—up 10 points to 65 percent in 1992.

■ Shoppers expect supermarkets to provide clear product information, evidenced by the greater number who value "readable and accurate shelf tags" (up three points to 94 percent).

■ Fresh food sections like a deli or bakery are important to nearly four out of five shoppers (78 percent), a five-point increase in the past year.

At least nine out of 10 shoppers also place importance on a convenient location, readable and accurate shelf tags, fast checkout, and items on sale or money-saving specials.

Four in five look for attention to their special requests or needs, the availability of health and nutrition information, a convenient store layout and fresh food sections like a deli or bakery. At least two-thirds value environmental programs, a good selection of nonfood products and the availability of private label or store brands.

This is the sixth consecutive year in which *Trends* asked shoppers to rate the various factors in supermarket selection. Three new items were added this year (clean, neat store; attention to special requests or needs; and good selections of nonfood products), each of which is important to at least two out of three shoppers.

**Margin quotations are taken from "The State of the Industry—The Food Marketing Industry Speaks" presentation Monday, May 4, 1992, at the FMI Supermarket Convention Chicago, IL. Timothy M. Hammonds, Senior Vice President Food Marketing Institute*

TABLE

1

HOW WELL SUPERMARKETS MEET CONSUMER EXPECTATIONS, 1988-1992

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store*

Q: *Now I'm going to read the same list of factors and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair, or poor job of having (READ EACH ITEM).*

Base. The shopping public

	Very or Somewhat Important					Excellent or Good Rating				
	1988	1989	1990	1991	**1992**	1988	1989	1990	1991	**1992**
	%	%	%	%	**%**	%	%	%	%	**%**
Clean, neat store	x	x	x	x	**100**	x	x	x	x	**92**
Quality produce (fruits and vegetables)	98	98	98	99	**99**	85	85	88	88	**87**
Good variety or wide selection	96	96	97	98	**97**	87	86	89	87	**90**
Good, low prices	94	92	96	96	**97**	72	71	66	65	**73**
Courteous, friendly employees	93	94	94	96	**96**	87	85	87	87	**87**
Good quality meat	94	95	96	95	**96**	85	84	86	83	**84**
Convenient location	92	91	92	93	**95**	88	89	88	90	**91**
Readable and accurate shelf tags	92	92	92	91	**94**	70	72	70	72	**73**
Fast checkout	88	88	89	91	**91**	70	71	69	67	**72**
Items on sale or money-saving specials	86	84	85	88	**91**	79	77	77	78	**83**
Attention to special requests or needs	x	x	x	x	**85**	x	x	x	x	**70**
Nutrition and health information available for shoppers[1]	74	84	84	86	**84**	50	55	75	71	**75**
Convenient store layout	78	76	77	79	**80**	85	83	83	83	**85**
Fresh food sections like a deli or bakery[2]	76	76	72	73	**78**	77	81	87	88	**87**
Environmental programs	x	x	x	72	**71**	x	x	x	76	**78**
Good selection of nonfood products	x	x	x	x	**70**	x	x	x	x	**77**
Private label or store brands[1]	x	x	54	55	**65**	x	x	74	73	**76**
Fresh seafood section[1]	x	x	63	60	**60**	x	x	75	74	**69**
24-hour operation[1]	x	x	45	45	**49**	x	x	x	x	**x**
Pharmacy[1]	x	x	37	37	**41**	x	x	58	66	**70**

x = Not asked.

[1]Beginning in 1990, the supermarket's performance was rated only by those whose supermarket has the specified feature. In earlier years, these items were asked of all respondents

[2]In 1988 and 1989, shoppers were asked to rate "specialty food sections like a deli, bakery or fresh fish"

Women place greater importance on about half of the rated supermarket features (see Table 2). They appear more cost-conscious, attaching more importance to good, low prices, items on sale or money-saving specials, and private label or store brands.

Women also place more emphasis on the quality of service, particularly employee attitudes (courteous, friendly), and attention to special requests or needs. The store's ability to inform shoppers through readable and accurate shelf tags and to provide nutrition and health information also are more important to women than men.

Of the remaining items, women place more importance on two

- Environmental programs
- Good selection of nonfood products

Among women, more working ones value a convenient store location and 24-hour operations. Nonworking women, however, attach more importance to good quality meat and private label or store brands.

TABLE

2

IMPORTANCE OF SUPERMARKET FEATURES BY SEX

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

Base: The shopping public

	Jan. 1992 Total	Men	Women Total	Women Working	Women Nonworking
Base	**1,000**	215	785	411	366
Very or Somewhat Important	%	%	%	%	%
Clean, neat store	**100**	99	100	100	100
Quality produce (fruits and vegetables)	**99**	95	100	100	100
Good variety or wide selection	**97**	97	97	97	97
Good, low prices	**97**	92	99	99	98
Courteous, friendly employees	**96**	92	97	98	97
Good quality meat	**96**	96	96	94	98
Convenient location	**95**	93	96	98	93
Readable and accurate shelf tags	**94**	90	95	96	95
Fast checkout	**91**	90	92	93	90
Items on sale or money-saving specials	**91**	84	93	93	94
Attention to special requests or needs	**85**	77	88	86	90
Nutrition and health information available for shoppers	**84**	72	87	87	89
Convenient store layout	**80**	78	81	82	80
Fresh food sections like a deli or a bakery	**78**	74	78	79	78
Environmental programs	**71**	61	74	76	72
Good selection of nonfood products	**70**	59	73	73	72
Private label or store brands	**65**	55	67	64	72
Fresh seafood section	**60**	56	61	61	60
24-hour operation	**49**	49	49	54	43
Pharmacy in store	**41**	35	42	42	43

The importance of supermarket features varies little among shoppers of different ages (see Table 3). Shoppers aged 18 to 24 care least about courteous and friendly employees and the most on a good selection of nonfood products and 24-hour operation. The importance of an in-store pharmacy and 24-hour operations declines with age, while the reverse holds true for private label or store brands.

Store features relating to cost savings and convenience clearly differentiate shoppers who live alone from those in larger households (see Table 4). One-person households place less importance on good, low prices, items on sale, a convenient location and a fast checkout. Three other features are of increasing importance to larger households: attention to special requests or needs; availability of health and nutrition information; and environmental programs.

Supermarkets are best able to meet shoppers' expectations with respect to providing a clean, neat store (92 percent), a convenient location (91 percent) and good variety or wide selection (90 percent). This is the sixth consecutive year that *Trends* has asked shoppers to rate their supermarket's performance. Although supermarket performance ratings continue to fall below importance ratings, four out the five items of greatest importance are also the ones on which shoppers most favorably rate their supermarkets' performance:

- Clean, neat store (92 percent).
- Good variety or wide selection (90 percent).
- Quality produce (87 percent).
- Courteous, friendly employees (87 percent).

TABLE 3

IMPORTANCE OF SUPERMARKET FEATURES BY AGE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

Base: The shopping public

	Jan. 1992 Total	Age 18-24	25-39	40-49	50-64	65+
Base	**1,000**	78	351	205	200	150
Very or Somewhat Important	%	%	%	%	%	%
Clean, neat store	**100**	100	100	100	98	100
Quality produce (fruits and vegetables)	**99**	96	98	99	99	100
Good variety or wide selection	**97**	99	96	98	98	98
Good, low prices	**97**	99	98	98	96	94
Courteous, friendly employees	**96**	91	95	97	98	99
Good quality meat	**96**	95	95	96	97	99
Convenient location	**95**	95	96	96	96	92
Readable and accurate shelf tags	**94**	94	93	94	97	95
Fast checkout	**91**	95	91	93	91	89
Items on sale or money-saving specials	**91**	91	90	92	93	91
Attention to special requests or needs	**85**	90	83	87	85	87
Nutrition and health information available for shoppers	**84**	85	82	81	90	85
Convenient store layout	**80**	82	74	82	85	85
Fresh food sections like a deli or bakery	**78**	78	80	81	73	76
Environmental programs	**71**	77	70	74	70	67
Good selection of nonfood products	**70**	83	72	66	63	72
Private label or store brands	**65**	59	63	62	69	72
Fresh seafood section	**60**	62	55	62	61	65
24-hour operation	**49**	73	52	57	40	36
Pharmacy in store	**41**	45	42	44	38	37

At least four out of five shoppers rate their supermarket's performance good or excellent on these additional features:

- Fresh food sections like a deli or bakery (87 percent)
- Convenient store layout (85 percent).
- Good quality meat (84 percent).
- Items on sale or money-saving specials (83 percent).

Supermarkets are making strides in meeting shoppers' expectations on key issues (see Table 1). Over the past year, when economic issues such as unemployment and recession are foremost in shoppers' minds, significantly more consumers feel that their principal supermarket is addressing their economic concerns. Shoppers' rate their supermarket more favorably than ever for providing items on sale (up five points to 83 percent) and good, low prices (up eight points to 73 percent)

More 1992 than 1991 shoppers also feel that their supermarket offers a good variety of merchandise and fast checkout. Fewer 1992 shoppers, however, are satisfied with their store's fresh seafood section.

Consistent with prior years, the importance shoppers place on supermarket features exceeds performance ratings for the top 12 items. Performance ratings exceed expectations for the seven least important items (see Table 1).

TABLE 4

IMPORTANCE OF SUPERMARKET FEATURES BY HOUSEHOLD SIZE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store*

Base· The shopping public

	Jan. 1992 Total	Household Size: One	Two	Three-Four	Five Or More
Base	**1,000**	149	313	399	116
Very or Somewhat Important	%	%	%	%	%
Clean, neat store	**100**	99	100	100	99
Quality produce (fruits and vegetables)	**99**	97	99	99	99
Good variety or wide selection	**97**	97	97	97	98
Good, low prices	**97**	93	97	98	100
Courteous, friendly employees	**96**	95	97	95	97
Good quality meat	**96**	97	96	96	94
Convenient location	**95**	92	95	96	97
Readable and accurate shelf tags	**94**	94	94	94	96
Fast checkout	**91**	86	91	92	97
Items on sale or money-saving specials	**91**	83	91	93	97
Attention to special requests or needs	**85**	81	85	86	90
Nutrition and health information available for shoppers	**84**	82	83	84	87
Convenient store layout	**80**	83	81	78	84
Fresh food sections like a deli or bakery	**78**	79	74	78	80
Environmental programs	**71**	64	69	74	72
Good selection of nonfood products	**70**	71	67	71	67
Private label or store brands	**65**	61	66	63	73
Fresh seafood section	**60**	58	62	59	59
24-hour operation	**49**	48	46	52	52
Pharmacy in store	**41**	41	38	44	38

Overall Satisfaction With Supermarkets

Shoppers remain quite satisfied with the job their principal supermarket is doing in meeting their grocery shopping needs, although two out of three can suggest improvements (Tables 5, 7). As they have since 1988, on average, shoppers rate their supermarket a 7.9 on a scale of one to 10, where "one" indicates their supermarket is doing a poor job and "10" an excellent job. This level has held constant for five years. One out of three shoppers rate their supermarket a "nine" or "10." When shoppers suggest improvements, they focus on items of known importance: more variety, better assortment and wider choice; faster checkouts, and lower prices. These are items on which supermarket performance has improved over the past year (see Table 1), but for which there is obviously room for more improvement.

TABLE 5

CONSUMERS EVALUATE THEIR PRINCIPAL SUPERMARKET, 1988-1992

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means they are doing a poor job and "10" means they are doing an excellent job. Use any number between and including one to 10.*

Base: The shopping public

	Average Rating (1 to 10 Scale)					Percent Rating Supermarket 9 or 10				
	1988	1989	1990	1991	**1992**	1988	1989	1990	1991	**1992**
						%	%	%	%	%
Total	7.9	7.9	7.9	7.9	**7.9**	32	32	29	32	**33**
Sex										
Men	7.7	7.7	7.7	7.7	**7.6**	29	25	22	24	**23**
Women	7.9	7.9	7.9	8.1	**8.0**	32	33	31	35	**36**
Working	7.7	7.9	7.8	8.0	**7.8**	26	31	28	31	**30**
Nonworking	8.2	7.9	8.1	8.1	**8.2**	41	36	35	38	**43**
Type of Household										
With Children	7.8	7.8	7.7	7.9	**7.8**	29	30	24	29	**30**
No Children	8.0	8.0	8.0	8.0	**8.0**	34	33	33	33	**35**
Size of Household[1]										
1	8.1	8.0	8.1	7.8	**8.1**	40	38	37	33	**35**
2	7.9	8.0	8.0	8.0	**8.0**	30	31	33	34	**36**
3	7.9	7.8	7.8	N/A	**N/A**	30	32	26	N/A	**N/A**
4	8.0	7.7	7.7	7.9	**7.8**	36	29	23	29	**30**
5 or more	7.5	7.8	7.7	8.0	**7.8**	23	31	25	35	**31**
Age										
18-24	7.9	7.7	7.8	7.6	**7.7**	23	21	28	20	**26**
25-39	7.8	7.8	7.7	7.8	**7.7**	28	27	21	26	**26**
40-49	7.6	7.8	7.8	8.0	**7.8**	27	35	27	33	**29**
50-64	8.1	8.0	8.1	8.1	**8.2**	36	35	38	35	**40**
65 and older	8.3	8.2	8.3	8.3	**8.5**	51	43	43	47	**50**

[1]Beginning in 1991, household size of three and four persons are combined.

Demographics differentiate overall shopper ratings of supermarket performance (Tables 5, 6).

■ Women, particularly the nonworking, are more pleased with their supermarket's performance than men.

■ Shoppers with children are more satisfied than others with the job their supermarket is doing. This runs contrary to the decline in satisfaction among households of three or more persons.

■ Older shoppers are more satisfied than are younger shoppers. One in two shoppers aged 65 or older rates their supermarket a "nine" or "10," compared to only one in four under 40.

■ Satisfaction is highest among shoppers with household incomes of $15,000 or less and declines as income rises.

■ Shoppers without a college education are more satisfied than those with at least some college.

TABLE

6

CONSUMERS EVALUATE THEIR PRINCIPAL SUPERMARKET, 1990-1992

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to 10, where "one" means they are doing a poor job and "10" means they are doing an excellent job. Use any number between and including one to 10.*

Base: The shopping public

	Average Rating (1 to 10 scale)			Percentage Rating Supermarket 9 or 10		
	1990	1991	**1992**	1990	1991	**1992**
				%	%	%
Total	7.9	7.9	**7.9**	29	32	**33**
Income						
$15,000 or less	8.0	8.0	**8.2**	39	42	**41**
$15,001-$25,000	7.9	8.1	**7.9**	29	35	**33**
$25,001-$35,000	7.7	7.9	**7.8**	24	29	**28**
$35,001-$50,000	7.9	7.8	**7.7**	23	25	**27**
$50,001 or more	7.7	7.8	**7.8**	25	25	**31**
Education						
High school or less	8.0	8.1	**8.0**	36	37	**37**
Some college/college graduate	7.7	7.8	**7.9**	21	27	**29**

Suggested Improvements in Principal Supermarket

About two out of three shoppers would like to see improvements in their primary supermarket (see Table 7), primarily better variety, selection and a wider choice of products and services (22 percent). Faster checkout (14 percent) and lower prices (13 percent) are the only other improvements suggested by at least one in 10. As noted in Table 1, supermarkets began to make strides in all three areas over the past year

TABLE

7

CONSUMERS SUGGEST IMPROVEMENTS IN THEIR PRINCIPAL SUPERMARKET

Q: *Overall what improvements, if any, would you like to see in the supermarket where you usually shop for food?*

Base: The shopping public

	Jan 1992 Total
Base	2,000
	%
More variety/better assortment/wider choice (NET)	22
More variety/better assortment/wider choice (nonspecific)	13
More variety/better assortment/wider choice of specific food items	6
More variety/better assortment/wide choice of specific services	5
Faster checkouts	14
Lower prices	13
Better layout/easier to shop	8
Offer better quality products	5
Fresher products	5
Better service (nonspecific)	4
Cleaner/neater	4
More help in the store/courteous help	3
More items on sale money-saving specials	3
Better stocked shelves/more consistent stocking inventory	2
More private label store brands	2
More attention to special requests and needs	2
More knowledgeable employees	2
Better in-store signs	2
Better parking	2
Other	5
None	22
Don't know	10

Multiple responses accepted

Select responses of at least two percent shown

"ALL ACROSS OUR COUNTRY PEOPLE TIGHTENED THEIR BELTS THIS YEAR. THE RESULTING CHANGE IN SPENDING PATTERNS HAS HAD A DRAMATIC IMPACT ON EVERY SEGMENT OF THE ECONOMY, INCLUDING OUR OWN."

CHAPTER 2

SPENDING AND SAVING MONEY

THE WEEKLY GROCERY BILL

After the 1991 jump in average weekly grocery bills, expenses have leveled off, declining by $1 per week to $78 (Table 8). Weekly family grocery expenses declined modestly, but not significantly, for all but one-person households (Table 9).

In the past year, per-person weekly grocery expenditures declined from $32 to $30 (Table 10). Economies of scale prevail: per-person expenses decline as the size of the household increases. The per-person amount of $44 for one-person households is more than double the $19 reported for households of five or more. Consistent with this finding, per-person expenses are lower in households with children.

For the first time ever, per-person expenditures in two-income households fall below those in more traditional one-income families. Geographically, per-person expenses have declined the most for shoppers in the East and West, two areas hard hit by the recession.

TABLE 8

WEEKLY FAMILY GROCERY EXPENSES, 1981-1992

Q: *About how much do you spend each week on groceries for your family?*

Base: The shopping public

	Total											
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	**Jan. 1992**
	%	%	%	%	%	%	%	%	%	%	%	**%**
$0-$40	29	30	28	23	23	19	21	23	21	21	19	**20**
$41-$60	29	25	29	29	27	28	26	25	24	24	22	**23**
$61-$100	31	30	33	34	34	38	37	38	37	39	39	**39**
$101 and over	6	8	9	9	12	13	12	11	14	13	17	**15**
Not sure/no answer/refused	NA	7	1	4	4	3	3	3	5	3	2	**4**
Average weekly grocery expenses	$55	$58	$62	$64	$68	$74	$72	$71	$74	$74	$79	**$78**

NA = Not available in 1981

May not add to 100 percent due to rounding

TABLE

9

WEEKLY FAMILY GROCERY EXPENSES BY SIZE OF HOUSEHOLD, 1982-1992

Q: *About how much do you spend each week on groceries for your family?*

Base: The shopping public

	Total										
	Jan 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan 1990	Jan. 1991	**Jan. 1992**
	$	$	$	$	$	$	$	$	$	$	**$**
Size of Household											
1	33	36	40	40	41	33	38	40	39	43	**44**
2	51	54	59	58	62	58	61	63	63	71	**66**
3	70*	72*	71	76	76	77	74	80	82	92*	**90***
4	70*	72*	80	85	84	85	88	90	91	92*	**90***
5 or more	90	85	82	92	103	104	98	109	103	111	**107**

*Expenses for 1982, 1983, 1991 and 1992 are combined for three- and four-person households

Frequency of Using Money-Saving Measures

General economic conditions have made shoppers more aggressive in their use of money-saving measures. After a decline in 1991, use of the top measures rebounded (Table 11). Three economizing measures are practiced by at least two out of five shoppers pretty much every time they shop Looking in the newspaper for grocery specials (45 percent) once again surpasses price-off coupons (43 percent) as the primary way shoppers economize on their food bills. Shopping only at one store is reported with nearly equal frequency (42 percent), although at least one in four shoppers routinely compare prices at different supermarkets (25 percent). Another one out of three shoppers stocks up on bargains (30 percent).

Beginning in 1982, shoppers were asked how often they economize by using supermarket specials, coupons and price comparisons For the first time, in 1992, *Trends* also asked shoppers how often they shop only at one store or shop at warehouse club stores like BJ's, PACE, Price Club, Costco and Sam's. Nationally, 10 percent shop club stores at least fairly often, while another 36 percent occasionally, and 53 percent never.

Use of price-off coupons is at an all-time high (43 percent) and looking in the newspaper for grocery specials is mentioned more now than at any time since 1984. The percentage of shoppers who take these measures pretty much every time they shop has increased significantly since 1991. More 1992 than 1991 shoppers also say they stock up on bargains or compare prices at different supermarkets (Table 11).

Almost one in five shoppers buy store brands or lower priced brands instead of national brands pretty much every time they shop (18 percent), and shoppers place significantly greater importance on private label or store brands now than in 1991 (see Table 1). The number of shoppers who buy products on special also has remained stable over the past year (18 percent).

Although one in four shoppers actually compare prices at different supermarkets pretty much every time they shop, only about one in 10 actually go to supermarkets other than their principal one for advertised specials. This latter finding is consistent with the large number who say they shop only at one store.

Demographic differences in economizing behavior are widespread. Nonworking women use economizing measures more frequently than do men, and in some cases more so than working women (Table 13A). Older shoppers and those in larger households also exhibit money-saving measures more often (Table 13B). Many economizing measures are more prevalent among those with lower incomes or less formal education (Table 13C). These and other differences are detailed below.

TABLE 10

AVERAGE PER-PERSON WEEKLY GROCERY EXPENSES, 1982-1992*

Base: The shopping public

	Total										
	Jan. 1982	Jan. 1983	Jan. 1984	Jan 1985	Jan. 1986	Jan 1987	Jan. 1988	Jan. 1989	Jan 1990	Jan 1991	**Jan. 1992**
	$	$	$	$	$	$	$	$	$	$	**$**
Total	21	22	23	24	27	24	26	29	29	32	**30**
Married											
One spouse at home	20	20	22	23	25	23	24	26	26	28	**28**
Two wage-earners	22	22	23	23	26	25	25	26	28	31	**27**
Type of Household											
With children	19	19	19	21	21	21	22	23	22	26	**24**
No children	25	28	28	29	32	28	31	33	34	36	**35**
Size of Household											
1	33	36	40	40	41	33	38	40	39	43	**44**
2	26	27	29	29	31	27	29	31	32	35	**33**
3-4	20	21	22	23	23	23	23	25	25	27	**26**
5 or more	17	16	15	17	19	17	17	19	18	20	**19**
Region											
East	23	22	23	25	28	25	26	30	33	36	**33**
Midwest	20	20	22	21	25	22	25	26	26	28	**27**
South	20	24	23	24	26	25	26	28	28	31	**29**
West	23	24	24	26	27	24	29	31	28	35	**31**

*Calculated from average weekly grocery expenses and household size. Where respondents couldn't provide data, they were omitted from the calculation.

TABLE

11

HOW OFTEN SHOPPERS ECONOMIZE, USE SUPERMARKET SPECIALS, COUPONS AND PRICE COMPARISONS, 1982-1992

Q: *How often do you (READ EACH ITEM)—pretty much every time you stop, fairly often, only occasionally or never?*

Base: The shopping public

		Pretty Much Every Time You Shop										1992				
		1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	**Pretty Much Every Time**	Fairly Often	Only Occasionally	Never	Not Sure
Look in the newspaper for grocery specials	%	50	52	49	41	40	**	42	34	38	33	**45**	18	19	18	*
Use price-off coupons	%	39	38	39	30	39	37	40	35	37	36	**43**	20	25	12	0
Shop only at one store	%	x	x	x	x	x	x	x	x	x	x	**42**	25	16	17	*
Stock up on an item when you find a bargain	%	x	x	x	x	x	x	x	x	x	24	**30**	31	30	10	*
Compare prices at different supermarkets	%	32	30	29	27	25	23	26	23	24	20	**25**	20	31	25	0
Buy store brands or lower priced brands instead of national brands***	%	x	x	x	x	x	x	x	x	x	18	**18**	31	40	10	1
Buy products on special even if you hadn't planned to buy them that day	%	x	x	x	x	x	x	x	x	x	17	**18**	32	40	10	*
Go to supermarkets other than your principal one for advertised specials	%	16	13	12	10	9	12	12	12	10	9	**9**	16	46	28	*
Shop at a discount or warehouse food store for grocery items	%	x	x	x	x	x	x	x	x	x	5	**6**	13	40	40	1
Shop at warehouse club stores like BJs, PACE, Price Club, Costco and Sam's	%	x	x	x	x	x	x	x	x	x	x	**2**	8	36	53	1

x = Not asked

*Less than 0.5 percent

**Not reported due to date anomaly

***In 1991, asked as "buy store brands or lower priced products instead of national brands"

TABLE

12

HOW OFTEN SHOPPERS ECONOMIZE COMPARED TO ONE YEAR AGO

Q: *Now I'd like you to think of your shopping habits over the past year. For each of the following items, please tell me whether you do it more often, less often, or about the same amount that you did a year ago.*

Base: The shopping public

	Frequency of Activity			
	More	Less	Same	Don't Know
	%	%	%	%
Buy store brands or lower priced brands instead of national brands	22	12	64	2
Shop at a warehouse club store	9	19	65	7

Look in Newspaper for Grocery Specials

■ Nonworking women read the newspaper for grocery specials more often than either working women or men (Table 13A).

■ Eastern shoppers are more likely than Southerners to scan the newspaper for grocery specials (Table 13A).

■ Shoppers age 50 or older are most likely to use advertised newspaper specials. Shoppers under age 25 are least likely to do so (Table 13B).

■ At least one in two shoppers from households of two or five or more persons look for grocery specials in the paper. One-person households do so least often (Table 13B).

■ Use of newspaper specials declines as income rises. Shoppers from households earning less than $15,000 are the most likely to use grocery specials in the paper (Table 13C).

■ High school educated shoppers look through the newspaper for specials with greater frequency than others (Table 13C)

Use Price-Off Coupons

■ Women, particularly nonworking ones, are more likely than men to use price-off coupons (Table 13A).

■ Shoppers who live in the East and Midwest use price-off coupons more often than those in the South and West (Table 13A).

■ The use of price-off coupons increases with household size. Coupon use among one-person households falls well short of others (Table 13B).

TABLE

13A

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES BY SEX AND REGION

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

Base. The shopping public

		Sex				Region			
			Women						
	Total	Men	Total	Working	Non-Working	East	Midwest	South	West
Base	1,000	215	785	411	366	183	260	338	219
	%	%	%	%	%	%	%	%	%
Pretty Much Every Time									
Look in newspaper for grocery specials	45	34	48	41	55	51	45	42	43
Use price-off coupons	43	28	47	41	53	53	49	38	35
Shop only at one store	42	42	42	42	43	46	40	44	38
Stock up when you find a bargain	30	23	32	31	33	34	30	32	23
Compare prices at different supermarkets	25	19	27	24	29	26	24	25	27
Buy store/lower priced brands instead of national brands	18	13	20	17	24	16	15	20	22
Buy products on special even if you hadn't planned to	18	14	19	17	21	15	15	20	19
Go to supermarkets other than your principal one for advertised specials	9	8	10	9	11	15	8	7	10
Shop at a discount or warehouse store for grocery items	6	6	7	8	6	4	7	5	8
Shop at warehouse club stores like BJs, PACE, etc.	2	2	2	3	1	2	2	2	2

Shop Only at One Store

■ Shoppers under the age of 25 are the most likely of any age group to limit shopping to only one store (Table 13B)

■ Shoppers with household incomes up to $15,000 most often shop only at one store (Table 13C).

Stock Up When You Find a Bargain

■ When it comes to stocking up on bargains, women do this more often than men (Table 13A).

■ Shoppers from one-person households are by far the least likely to stock up on bargains (Table 13B).

■ Shoppers with incomes of $50,000 or less stock up more frequently than others (Table 13C).

■ Shoppers without a college education stock up on bargains more often than the college educated shoppers. (Table 13C).

Compare Prices at Different Supermarkets

■ Women are more likely than men to go to a supermarket other than their principal one to compare prices (Table 13A).

■ Shoppers whose household income does not exceed $50,000 most often make price comparisons (Table 13C).

■ Shoppers without a college education more often compare prices than college-educated shoppers (Table 13C).

TABLE

13B

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES BY AGE AND SIZE OF HOUSEHOLD

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Age					Size of Household			
	Total	18-24	25-39	40-49	50-64	65 And Over	One	Two	Three-Four	Five Or More
Base	1,000	78	351	205	200	150	149	313	399	116
Pretty Much Every Time	%	%	%	%	%	%	%	%	%	%
Look in newspaper for grocery specials	45	31	37	43	58	53	34	50	42	53
Use price-off coupons	43	33	42	42	43	49	30	43	45	52
Shop only at one store	42	50	39	43	41	45	48	41	40	44
Stock up when you find a bargain	30	24	33	26	32	31	22	32	32	31
Compare prices at different supermarkets	25	22	23	22	30	27	20	24	26	30
Buy store/lower priced brands instead of national brands	18	21	20	18	19	14	17	17	20	20
Buy products on special even if you hadn't planned to	18	12	18	18	19	16	16	18	17	22
Go to supermarkets other than your principal one for advertised specials	9	5	7	10	13	10	7	8	11	10
Shop at a discount or warehouse store for grocery items	6	9	7	8	5	3	4	4	10	5
Shop at warehouse club store like BJs, PACE, etc.	2	1	3	3	1	1	1	2	3	3

Buy Store or Lower Priced Brands Instead of National Brands

■ Women are more likely than men to purchase store brands (Table 13A).

■ Use of store brands declines with age, and is least frequent among shoppers who are at least 65 years of age (Table 13B).

■ Store-brand purchases decline as household income rises and are greatest among shoppers with household incomes of $15,000 or less (Table 13C).

■ Shoppers without a college education purchase store brands more frequently than others (Table 13C).

Buy Products on Special That Day Even If You Hadn't Planned

■ Shoppers with no college education are more likely than others to buy products on special (Table 13C).

Go to Supermarkets Other Than Your Principal One for Advertised Specials

■ Shoppers under age 25 are the least likely to go to another supermarket for advertised specials (Table 13B).

■ Shoppers without a college education more often shop for advertised specials at a supermarket other than their principal one (Table 13C).

Shop at a Discount or Warehouse Store for Grocery Items

■ Use of discount or warehouse stores declines with age.

■ Shoppers from three- to four-person households use these stores more frequently than others (Table 13B).

TABLE 13C

HOW USE OF SPECIALS, COUPONS AND PRICE COMPARISONS VARIES BY INCOME AND EDUCATION

Q: *How often do you (READ EACH ITEM)—pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Income					Education	
	Total	Less than $15,000	$15,001-$25,000	$25,001-$35,000	$35,001-$50,000	Over $50,000	High School Or Less	Some Coll. College Graduate
Base	1,000	194	181	186	159	150	488	503
Pretty Much Every Time	%	%	%	%	%	%	%	%
Look in newspaper for grocery specials	45	52	18	41	42	36	50	40
Use price-off coupons	43	43	43	47	41	40	45	41
Shop at only one store	42	49	40	41	42	39	42	42
Stock up when you find a bargain	30	33	33	31	32	22	38	22
Compare prices at different supermarkets	25	29	27	23	26	17	28	22
Buy store/lower priced brands instead of national brands	18	28	20	17	13	10	22	15
Buy products on specials that day even if you hadn't planned to	18	21	18	18	18	14	22	13
Go to supermarkets other than your principal one for advertised specials	9	12	9	7	6	9	13	6
Shop at a discount or warehouse store for grocery items	6	6	7	6	5	7	6	7
Shop at warehouse club store like BJs, PACE, etc	2	1	2	2	3	4	1	3

Store Brands Vs. Nationally Advertised Brands

The majority of shoppers believe that store brands are of the same quality as nationally advertised brands (61 percent), although a substantial portion of shoppers—30 percent—believe that nationally advertised brands are of better quality (see Table 14). The comparability of store and national brands depends on the type of product (see Table 15).

For the first time in 1992, *Trends* asked shoppers to rate the quality of store brands versus national brands. In addition, shoppers were asked to name the types of products, if any, for which store brands are *better than* nationally advertised brands.

Shoppers hold homogeneous perceptions of store brands vis-a-vis national brands. Only household income appears to differentiate shoppers. The number who believe that store and national brands are of equal quality declines as income rises (Table 14).

One in four shoppers (24 percent: Table 15) feel that the store brands of specific products are actually better than nationally advertised brands, while two in five hold the opposite view, favoring the national brands.

TABLE 14

HOW CONSUMERS RATE STORE BRANDS VS. NATIONALLY ADVERTISED BRANDS

Q: *In general, would you say that the quality of store brands is better, not as good as, or about the same as nationally advertised brands?*

Base: The shopping public

		Compared To National Brands, Store Brands Are			
	Base	Better	Not As Good	Same	Don't Know
Total	1,000	3%	30	61	6
Income					
$15,000 or less	194	4%	20	69	7
$15,001-$25,000	181	2%	32	64	3
$25,001-$35,000	186	3%	28	63	5
$35,001-$50,000	159	3%	34	57	6
$50,001 or more	150	0%	41	53	6

May not add to 100 percent due to rounding

TABLE

15

STORE-BRAND PRODUCTS CONSUMERS BELIEVE ARE BETTER THAN NATIONAL BRANDS

Q: *Are there any specific types of food and nonfood products for which you feel store brands are particularly better than nationally advertised brands?*

Base: The shopping public

Q: *For what types of food and nonfood products are store brands better than nationally advertised brands?*

Base: Shoppers who feel there are specific products for which store brands are better than nationally advertised brands

	Jan. 1992 Total
	%
Percentage Who Feel Store Brands Are Better	24
Canned goods	34
Paper products	14
Bakery products	9
Dairy products	8
Snack foods	7
Frozen foods	7
Detergents	7
Cereals	6
Bread	6
Produce	5
Condiments	5
Garbage/trash bags	5
Pasta	4
Milk	3
Coffee	3
Cleaning products	3
Soft drinks	3
Other	14
Food products (NET)	72
Nonfood products (NET)	26
Don't know	8

Multiple responses accepted

Methods of Economizing

Majorities of shoppers rely on three techniques to save money on their food bills: making greater use of price-off coupons (61 percent), doing more with leftovers (60 percent) and buying fewer luxury or gourmet items (58 percent). Their reported reliance on price-off coupons is consistent with the finding that they use this measure on pretty much every shopping trip (Tables 16 and 11). At least one out of two forego convenience to save money, either by eating out less often (52 percent) or buying fewer convenience foods (51 percent). The only method of economizing shoppers do not use in great numbers is buying only what's on their list (24 percent).

Beginning in 1991, *Trends* investigated the extent to which shoppers utilize certain methods of economizing. *Trends* further investigated whether these money-saving measures were long-standing or recently adopted. Over the past year, the number of shoppers who practice almost all behaviors is becoming more widespread. The exception is buying only what's on the list: fewer 1992 than 1991 shoppers do this to save money.

As in 1991, for the most part these methods of economizing are not new to shoppers. With the exception of "eating out less often," these are activities that majorities of shoppers have been practicing for awhile.

As is evident with the extent shoppers use money-saving behaviors pretty much every time they shop (Tables 11-13C), shoppers may be differentiated by their overall use of these methods of economizing. Larger households, particularly those with children, more often look for ways to save money on groceries than smaller ones. Younger shoppers tend to be more cost-conscious than older shoppers, and women more so than men. These and other differences are detailed below (Table 17)

TABLE 16

MONEY-SAVING BEHAVIOR

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one, please tell me if this is something you currently do.*

Base: The shopping public

Q: *Is this something you've been doing for a few years and are continuing to do now to economize, or something that you've just begun to do recently?*

Base: Shoppers who currently use that method of economizing

	Currently Do		Frequency of Behavior	
	Jan 1991[1]	1992	Been Doing Awhile	Just Begun
	%	%	%	%
Make more use of price-off coupons	58	**61**	80	20
Do more with leftovers	56	**60**	81	18
Buy fewer luxury or gourmet items	55	**58**	66	33
Eat out less often	50	**52**	55	44
Buy fewer convenience foods	46	**51**	64	35
Do more meal planning	42	**45**	68	31
Buy in larger quantity	39	**40**	73	26
Buy only what's on your list	34	**24**	82	18

[1]1991 split sample base = 504.

TABLE

17

HOW CONSUMERS ECONOMIZE

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one please tell me if this is something you currently do.*

Base: The shopping public

	Use More Price-off Coupons	Do More With Leftovers	Buy Fewer Gourmet Items	Eat Out Less Often	Fewer Conven. Foods	More Meal Planning	Buy Larger Quantity	Buy List Items Only
	%	%	%	%	%	%	%	%
Total	61	60	58	52	51	45	40	24
Sex								
Men	45	57	46	53	47	39	34	29
Women	65	61	61	52	53	47	42	22
Age								
18-24	69	64	67	69	59	58	54	26
25-39	63	58	60	64	56	53	53	24
40-49	56	59	61	55	49	45	42	20
50-64	60	61	59	39	53	42	31	26
65 +	58	63	44	34	40	23	17	25
Education								
HS or less	66	64	58	55	54	44	44	21
Some college/ college graduate	56	56	58	51	49	46	37	27
Size of household								
One	48	58	56	49	40	25	22	27
Two	58	58	52	42	47	39	29	26
Three-Four	64	63	61	59	55	55	49	22
Five or more	75	59	67	68	66	54	66	22
Type of household								
With children	69	63	64	64	57	55	55	24
No children	55	57	52	44	47	36	27	24

Make More Use of Price-Off Coupons

■ Consistent with findings on the frequency with which price-off coupons are used, women make greater use of them than men.

■ Shoppers from households with children make greater use of coupons than do childless households.

■ Use of price-off coupons increases as household size increases, with the largest households using them most often.

■ Shoppers without a college education are more likely to use coupons than better educated shoppers.

Do More with Leftovers

■ Shoppers without a college education do more with leftovers than others.

Buy Fewer Luxury or Gourmet Items

■ More women than men save on food bills by foregoing gourmet items.

■ Compared with others, more shoppers with children save on groceries by not purchasing gourmet or luxury items.

■ Shoppers aged 65 or older are less likely to save money by giving up gourmet or luxury purchases

Eat Out Less Often

■ Shoppers who have children at home say they eat out less often than do those without children.

■ Shoppers from households of three or more persons are most likely to save money by eating out less often

■ Shoppers aged 50 or older are the least likely to save money by not eating out.

Buy Fewer Convenience Foods

■ Households with children are most likely to economize at the expense of convenience.

■ Shoppers age 65 or older are least likely to forego convenience foods to economize on their grocery bills.

Do More Meal Planning

■ More women than men use meal planning to economize on food bills

■ Households with children do so more than those without.

■ The extent to which shoppers plan meals increases with household size. This technique is most prevalent in households of three or more persons.

■ Shoppers age 65 or older rely the least of any age group on meal planning.

Buy in Larger Quantity

■ More women than men buy in larger quantities to economize on food bills.

■ Twice as many shoppers from households with children than without economize in this manner.

■ Quantity purchasing increases with household size. Shoppers from households of five or more persons are three times as likely to do this as those from one-person households.

■ The frequency with which shoppers buy in larger quantities declines with age. Shoppers under age 40 are more likely than those 50 or older.

Buy List Items Only

■ More men than women buy only what's on their list to economize

■ More college-educated than other shoppers stick to their list as a way of economizing.

Who are the Heavy Economizers?

Consumer concerns about the economy are evidenced by the fact that more than one in five shoppers may be classified as a "heavy economizer" (21 percent)—defined as someone who practices five or more of the eight economizing measures outlined in Table 16. This is up modestly from 18 percent in 1991 (See Table 18)

Beginning in 1991, as part of its emphasis on money-saving measures, *Trends* profiled shoppers who could be considered heavy economizers. Consistent with findings for other money-saving measures, heavy economizers are most likely to be:

- Women (22 percent).
- Married, from one-income households (26 percent).
- In households with children (27 percent).
- From larger households (30 percent of shoppers from households of five or more)
- Under age 25 (33 percent).

Heavy economizers spend an average of $81 per week on groceries, compared to $78 overall. Slightly higher overall expenditures probably reflect their larger overall household size. Per person expenditures of $27 are somewhat below the $30 reported overall (Table 18).

TABLE 18

PROFILE OF HEAVY ECONOMIZERS

Base The shopping public

	Heavy Economizers[1] 1991[2]	Heavy Economizers[1] **1992**
	%	%
Total	18	**21**
Sex		
Men	17	**16**
Women	19	**22**
Working	13	**22**
Nonworking	21	**22**
Married		
One spouse at home	23	**26**
Two wage-earners	20	**22**
Type of Household		
With children	24	**27**
No children	15	**15**
Size of Household		
One	13	**13**
Two	16	**17**
Three-four	22	**24**
Five or more	26	**30**
Age		
18-24	25	**33**
25-39	20	**24**
40-49	18	**21**
50-64	16	**19**
65 +	15	**10**
Income		
$15,000 or less	19	**23**
$15,001-$25,000	20	**22**
$25,001-$35,000	15	**25**
$35,001-$50,000	24	**20**
$50,001 or more	18	**16**
Region		
East	17	**22**
Midwest	19	**18**
South	21	**22**
West	14	**22**
Average Weekly Grocery Expenses		
Per family	$80	**$81**
Per person	$29	**$27**

[1] Included in the "heavy economizer" group are shoppers who currently practice five or more of the eight economizing measures summarized in Table 16

[2] 1991 split sample = 504

"THIS YEAR WE WERE ESPECIALLY INTERESTED IN TWO MONEY SAVING BEHAVIORS OF KEY STRATEGIC SIGNIFICANCE FOR OUR FUTURE: SHOPPING AT WAREHOUSE CLUB STORES AND THE USE OF PRIVATE LABEL STORE BRANDS."

CHAPTER 3

WAREHOUSE CLUB SHOPPERS

WHO ARE WAREHOUSE CLUB SHOPPERS?

Trends looked in depth at one specific method of economizing this year, shopping at warehouse clubs.

Since their introduction into the marketplace in 1976, warehouse club stores proliferated by 1992 to more than 500 nationwide. The four major chains—Sam's, Price Club, Costco and PACE—capture 90 percent of all warehouse club sales. These stores offer the consumer a wide variety of merchandise traditionally sold by supermarkets (e.g., health and beauty care products, cereal, frozen foods, etc.) at low everyday prices. This price appeal is particularly strong during the current recession, as consumers have become increasingly price-conscious.

Nearly half of 1992 *Trends* shoppers (47 percent) have made at least one visit to such a store. About one in 10 say they visit a warehouse club store at least fairly often when they shop for groceries. More than one in three consumers shop this format on an occasional basis (36 percent; see Table 11). Shoppers who have visited a warehouse club store at least occasionally are somewhat different than other shoppers (Table 19).[1] Compared with non-users, warehouse club shoppers are more likely to be from two-income households (36 percent vs. 25 percent) of three or more persons (59 percent vs. 46 percent). More than half include at least one child under age 18 (52 percent). The typical warehouse club shopper is married (72 percent) under age 50 (72 percent vs. only 56 percent of others), has at least some college education (54 percent) and is comparatively affluent (mean 1991 household income of $34,800 vs. $29,600 for others).

The average warehouse club household spends $85 per week on groceries, compared with $70 for non-club households largely as a result of their larger size. Per-person expenditures are comparable for both groups.

Expectations and Evaluations of Supermarket Performance

Warehouse club shoppers and others place the same value on the top store features and services, although a convenient location is slightly more important to warehouse club than non-club shoppers (97 percent vs. 94 percent; see Table 20). Of the remaining items, club shoppers place greater importance on only two: fresh food sections like a deli or bakery (81 percent vs. 74 percent); and environmental programs (75 percent vs. 68 percent). Notwithstanding differences in the ways these two groups economize, both shopper groups equally value good, low prices, items on sale or money-saving specials.[2]

Almost without exception, warehouse club and non-club shoppers give comparable ratings of their supermarket's performance. Club shoppers, who place greater importance on environmental programs, are somewhat less pleased than non-club shoppers with the job their supermarket is doing environmentally. Perhaps because warehouse club stores are known for the wide availability—if inconsistent stocking—of national brands at low prices, club shoppers also rate their supermarket's private label and store brands less favorably than others.

[1] *Other research conducted by FMI on alternative store formats (Alternative Store Formats: Competing in the Nineties)* suggests that membership club shoppers are differentiated by extent of use (amount spent per visit on groceries). *Trends* does not differentiate shoppers on this basis; membership club shoppers are defined as those who shop this format at least occasionally for groceries. As a result, findings here may differ somewhat from those reported elsewhere.

[2] FMI's study of alternative format shoppers reveals that two-thirds say that everyday low prices is the primary reason shoppers say they prefer to purchase canned goods, condiments, snacks, soft drinks, pet foods, paper products, household cleaning supplies and health and beauty care products at a club store rather than a supermarket.

TABLE

19

PROFILE OF WAREHOUSE CLUB SHOPPERS

Base: The shopping public

	Total	Club Shoppers	Non-Club Shoppers
Base	1,000	466	528
	%	%	%
Sex			
Men	22	19	24
Women	79	81	76
Working	41	47	36
Nonworking	37	34	40
Married	65	72	60
One spouse at home	24	27	22
Two wage-earners	30	36	25
Type of Household			
With children	46	52	41
No children	53	47	58
Size of Household			
One	15	10	19
Two	31	29	33
Three to four	40	46	35
Five or more	12	13	11
Age			
18-24	8	8	7
25-39	35	40	31
40-49	21	24	18
50-64	20	19	21
65 +	15	7	22
Education			
High school or less	49	45	52
Some college or more	50	54	47
Income			
$15,000 or less	19	15	24
$15,001-$25,000	18	16	20
$25,001-$35,000	19	19	18
$35,001-$50,000	6	19	13
$50,001 or more	15	18	13
Mean	$32,000	$34,800	$29,600
Average Weekly Grocery Expenses			
Per family	$77	$85	$70
Per person	$30	$30	$29
Average Number of Supermarket Visits per Week	2.2	2.3	2.1

TABLE

20

HOW WELL SUPERMARKETS MEET CONSUMER EXPECTATIONS, CLUB VS. NON-CLUB SHOPPERS

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important, or not at all important to you when you select a primary food store.*

Q: Now I'm going to read the same list of factors and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair or poor job of having (READ EACH ITEM).

Base: The shopping public

	Very or Somewhat Important			Excellent or Good Rating		
	Total	Club Shoppers	Non-Club Shoppers	Total	Club Shoppers	Non-Club Shoppers
Base	1,000	466	528	1,000	466	528
	%	%	%	%	%	%
Clean, neat store	100	100	99	92	92	91
Quality produce (fruits and vegetables)	99	99	99	87	89	86
Good variety or wide selection	97	97	97	90	91	89
Good, low prices	97	98	96	73	72	73
Courteous, friendly employees	96	97	95	87	87	88
Good quality meat	96	95	96	84	84	84
Convenient location	95	97	94	91	91	92
Readable and accurate shelf tags	94	95	93	73	73	73
Fast checkout	91	92	91	72	72	72
Items on sale or money-saving specials	91	92	91	83	82	83
Attention to special requests or needs	85	86	85	70	70	71
Nutrition and health information available for shoppers[1]	84	86	83	75	77	73
Convenient store layout	80	77	83	85	85	86
Fresh food sections like a deli or bakery	78	81	74	87	88	87
Environmental programs	71	75	68	78	74	82
Good selection of nonfood products	70	71	68	77	77	76
Private label or store brands[1]	65	63	67	76	72	79
Fresh seafood section[1]	60	63	57	69	67	71
24-hour operation[1]	49	52	47	x	x	x
Pharmacy[1]	41	44	38	70	69	72

x = Not asked

[1]Supermarket's performance was rated only by those whose supermarket has the specified feature

Importance of Factors in Food Selection

When shopping for food, virtually all warehouse club shoppers value taste, nutrition and price. While these are the top items for non-club shoppers as well, warehouse club shoppers place relatively greater value on these (see Table 21). Price appears to be a particularly salient issue, and is rated on a par with nutrition and taste (98 percent). Product safety is the only other item rated as being very important by at least nine out of 10 club shoppers.

TABLE

21

IMPORTANCE OF VARIOUS FACTORS IN FOOD SELECTION, CLUB VS. NON-CLUB SHOPPERS

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. 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 shop for food.*

Base: The shopping public

		Total	Club Shoppers	Non-Club Shoppers
Base		1,000	466	528
Taste	%	98	99	96
Nutrition	%	96	98	95
Price	%	96	98	94
Product safety	%	91	93	89
Storability	%	80	79	80
Product packaging that can be recycled	%	79	81	78
Ease of preparation time	%	73	79	78
Food preparation time	%	74	76	73

Warehouse Club Shoppers and Methods of Economizing

Warehouse club shoppers economize in somewhat different ways than those who do not shop in these stores (see Table 22). As one might expect, fewer club shoppers say that they shop only at one store (34 percent vs. 49 percent for other shoppers). Also, consistent with their lower evaluation of private label and store brands, club shoppers buy store or lower-priced brands less often than others (16 percent vs. 21 percent). At least two out of five club and non-club shoppers alike scan the newspaper for grocery specials and use price-off coupons pretty much every time they shop.

Although a majority of warehouse club shoppers rate the quality of store brands on a par with nationally advertised brands (57 percent), a larger proportion of club than non-club shoppers feels that the quality of store brands, in general, is not as good as that of national brands (34 percent vs. 28 percent). (See Table 23).

Warehouse club shoppers may be more easily differentiated from others by their overall use of certain economizing measures. With the exception of three items,—price-off coupons, newspaper-advertised specials and store brands—more club than non-club shoppers use other measures at least occasionally. In particular, nearly nine in 10 club shoppers utilize a discount or warehouse store for grocery items (88 percent), compared with only one in three non-club shoppers (34 percent). This latter finding suggests that club shoppers do not consider warehouse club stores to be the same as discount or warehouse stores.

TABLE 22

HOW CLUB AND NON-CLUB SHOPPERS VARY IN THEIR USE OF ECONOMIZING MEASURES

Q: *How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

	Pretty Much Every Time			At Least Occassionally		
	Total	Club Shoppers	Non-Club Shoppers	Total	Club Shoppers	Non-Club Shoppers
Base	1,000 %	466 %	528 %	1,000 %	466 %	528 %
Look in newspaper for grocery specials	45	43	47	82	82	82
Use price-off coupons	43	40	46	88	89	87
Shop at only one store	42	34	49	83	81	84
Stock up when you find a bargain	30	29	31	90	93	87
Compare prices at different supermarkets	25	27	23	76	82	70
Buy store/lower-priced brands instead of national brands	18	16	21	89	89	89
Buy products on special that day even if you hadn't planned to	18	19	17	90	93	87
Go to supermarkets other than your principal one for advertised specials	9	9	10	72	77	67
Shop at a discount or warehouse store for grocery items	6	8	5	59	88	34
Shop at warehouse club store like BJs, PACE, etc.	2	5	0	47	100	0

In keeping with warehouse club shoppers' price-consciousness and propensity not to limit their shopping to one store, they are more likely than others to at least occasionally go to other supermarkets for advertised specials or to compare prices at different supermarkets (see Table 22).

Other ways in which club shoppers economize parallel those of non-club shoppers. Regardless of where they shop, about six in 10 save on their food bills by making more use of price-off coupons, doing more with leftovers and limiting luxury and gourmet purchases. About half buy fewer convenience foods (see Table 24).

Despite many similarities between the two shopper groups, greater proportions of warehouse club shoppers say they economize by eating out less often, doing more meal planning and buying larger quantities. Buying larger quantities ties in with the availability of institutional size products at warehouse club stores and the larger households for which these consumers are shopping. Buying only what's on their list is the only economizing measure practiced by more non-club than club shoppers.[3]

TABLE

23

HOW CLUB AND NON-CLUB SHOPPERS RATE STORE BRANDS VS. NATIONAL BRANDS

Q: *In general, would you say that the quality of store brands is better, not as good as, or about the same as nationally advertised brands?*

Base: The shopping public

	Total	Club Shoppers	Non-Club Shoppers
Base	1,000	466	528
	%	%	%
Compared to National Brands Store Brands Are			
Better	3	3	3
Not as good	30	34	28
Same	61	57	65
Don't know	6	7	5

May not add to 100 percent due to rounding

[3]FMI's alternative store format study supports these findings. The characteristics club shoppers most frequently associate with a membership club store are the "availability of large or institutional sizes" (93 percent) and "good place to stock up" (90 percent). More than half associate it with "a place where I make many unplanned purchases" (56 percent) and only 32 percent associate "being able to do all my shopping in one store" with this format.

TABLE

24

MONEY-SAVING BEHAVIOR, CLUB VS. NON-CLUB SHOPPERS

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one, please tell me if this is something you currently do*

Base: The shopping public

Q: *Is this something you've been doing for a few years and are continuing to do now to economize, or something that yo ve just begun to do recently?*

Base. Shoppers who currently use that method of economizing

	Currently Do			Percent Who Have Been Doing Awhile[1]		
	Total	Club Shoppers	Non-Club Shoppers	Total	Club Shoppers	Non-Club Shoppers
Base	1,000	466	528			
	%	%	%	%	%	%
Make more use of price-off coupons	61	62	60	80	78	81
Do more with leftovers	60	59	61	81	81	82
Buy fewer luxury or gourmet items	58	60	55	66	60	71
Eat out less often	52	56	49	55	55	55
Buy fewer convenience foods	51	54	49	64	61	68
Do more meal planning	45	49	42	68	63	74
Buy in larger quantity	40	49	33	73	67	80
Buy only what's on your list	24	19	28	82	78	83

[1]Asked only of those who currently practice each behavior

"AS PEOPLE SUBSTITUTE SUPERMARKET CARRY-OUT FOODS AND CONVENIENCE FOODS FOR RESTAURANT MEALS, WE HAVE AN OPPORTUNITY TO KEEP THEM AS CUSTOMERS EVEN AFTER THE RECESSION FADES."

CHAPTER 4

SHOPPING PATTERNS

SWITCHING STORES

The number of shoppers who have switched stores in the past year remained at about one in four. For the first time, however, better or lower prices superseded a convenient store location as the primary reason for changing supermarkets (Tables 25, 26).

This year (1992) represents the fourth consecutive year in which *Trends* has investigated store switching, both its extent and why it happens. Since 1991, the number of shoppers who changed stores rose three points to 27 percent. Reversing a decline of comparable magnitude from 1990-91, this small increase is largely the result of changes in one demographic segment—working women. Only among shoppers age 65 and older did the proportion who switched stores decline in 1992 (see Table 25).

When asked to give the reasons for switching stores, the largest percentage cited cost savings, then convenience (see Table 26):

- Better/lower prices (39 percent).
- Location/new store is closer/more conveniently located (31 percent).
- Wide variety or a greater selection—a critical item in shoppers' evaluation of their principal supermarket—continues to drive much store switching (25 percent). This is also the major area in which shoppers suggest improvements to their principal supermarket (see Table 7). Fewer than one in 10 shoppers switch stores for any other single reason. These include employee attitudes and competence, relocation to another area and a cleaner store (now the most critical item in evaluation a supermarket's performance), all of which emerge as equal in importance to better meats as a reason for switching stores

TABLE 25

SWITCHING STORES

Q: *During the past year, have you switched grocery stores?*

Base The shopping public

	Jan 1989 Yes	Jan. 1990 Yes	Jan 1991 Yes	Jan. 1992 Switched Stores Yes	No	Not Sure
	%	%	%	**%**	%	%
Total	29	27	24	**27**	72	1
Sex						
Men	30	29	29	**30**	70	0
Women	29	27	22	**27**	73	1
Working	30	30	23	**31**	69	1
Nonworking	28	24	21	**22**	77	1
Age						
18-24	34	33	40	**44**	56	0
25-39	35	31	27	**32**	68	*
40-49	28	28	21	**31**	69	0
50-64	24	22	19	**22**	77	1
65 or older	21	23	22	**13**	86	1
Income						
$15,000 or less	31	30	23	**28**	72	0
$15,001-$25,000	26	28	26	**26**	74	0
$25,001-$35,000	39	27	23	**23**	75	2
$35,001-$50,000	32	28	24	**31**	68	1
$50,001 or more	27	26	25	**32**	68	0
Region						
East	31	24	26	**30**	70	0
Midwest	26	26	21	**24**	76	*
South	33	30	26	**29**	70	*
West	25	30	24	**27**	71	2

*Less than 0.5 percent

TABLE

26

REASONS FOR STORE SWITCHING

Q: *For what reasons did you switch?*

Base: Those who switched grocery stores

	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	**Jan. 1992 Total**
Base	302	278	243	**274**
	%	%	%	**%**
Better/lower prices	37	40	44	**39**
Location/new store is closer/more conveniently located	41	50	44	**35**
More variety/selection	23	28	26	**25**
Employee attitude and competence	N	N	N	**8**
Better meats	10	11	7	**8**
Moved to another area	N	N	N	**8**
New store cleaner	N	N	N	**7**
Better produce	9	9	7	**5**
Better quality products/store	N	N	N	**4**
Store closed	N	N	N	**3**
Other	26	16	15	**11**
Not sure	1	1	0	**1**

Multiple responses accepted

N = Not mentioned in previous years

Visits to Supermarket in an Average Week

In 1992, shoppers averaged 2.2 trips to the grocery store each week (see Table 27). This number is consistent with the average over the last 11 years, which has ranged from 2.0 to 2.6. Household size continues to be the factor that most clearly differentiates how often shoppers visit the supermarket. The frequency also varies by sex and presence of children (see Table 28).

- Men average more trips than women.
- Shoppers with children make more trips to the supermarket than others.
- Frequency of visits increases with household size. Shoppers from households of five or more average nearly three trips per week.

TABLE 27

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK, 1981-1992

Q: *About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once, and going to different stores.*

Base. The shopping public

	Total											
	Jan 1981	Jan. 1982	Jan 1983	Jan 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	**Jan. 1992[1]**
	%	%	%	%	%	%	%	%	%	%	%	**%**
Number of Visits												
1	26	31	31	31	29	31	29	28	30	31	30	**28**
2	33	32	34	31	32	34	32	32	31	32	34	**35**
3	21	20	20	20	20	20	21	22	21	21	19	**20**
4	8	7	8	8	9	6	8	9	6	7	8	**7**
5	4	3	3	4	4	4	3	4	3	3	4	**3**
6 or more	6	3	3	3	4	2	4	3	5	3	4	**3**
Every 2 weeks	1	1	*	2	2	1	1	2	3	3	2	**4**
Average number of supermarket visits per week	2.6	2.3	2.3	2.3	2.2	2.0	2.4	2.3	2.3	2.2	2.3	**2.2**

[1] Based on 2,000 shoppers in 1992

*Less than 0.5 percent

TABLE

28

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK

Q: *About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores*

Base· The shopping public

	Jan. 1992 Base	One	Two	Three	Four	Five	Six +	Every Two Weeks	Average
		%	%	%	%	%	%	%	
Total	2,000	28	35	20	7	3	3	4	2.2
Sex									
Men	462	25	33	23	8	5	3	2	2 4
Women	1,538	29	35	18	7	3	3	4	2.2
Working	819	28	35	18	7	3	4	5	2.2
Nonworking	704	31	35	19	6	3	3	3	2.2
Type of Household									
With children	923	24	36	22	8	4	4	2	2 4
No children	1,058	32	34	18	6	3	2	5	2.1
Size of Household									
1	297	35	33	16	5	1	1	6	1.9
2	627	31	34	18	6	3	3	5	2.1
3-4	813	26	36	21	7	4	4	2	2.3
5 or more	230	19	34	24	10	7	5	*	2.7
Age									
18-24	136	32	35	15	7	4	4	4	2.2
25-39	753	26	36	21	7	3	4	4	2.3
40-49	399	24	34	23	8	5	4	2	2.4
50-64	391	30	30	18	8	4	3	5	2.2
65 and older	300	33	37	18	4	2	1	4	2.0

May not add to 100 percent due to rounding

Supermarkets and Takeout Food

Fast-food restaurants dominate food establishments as the primary source of takeout food. They continue to grow as the most widely used source and are now used by well over half of all shoppers (55 percent), followed by restaurants (24 percent; Table 29).

One out of eight shoppers purchases takeout from a supermarket (12 percent). This is the first decline since 1987. Use of supermarkets for takeout varies by sex, marital status, household size, age and income, as follows (Table 30):

- Nonworking women take out food from the supermarket more frequently than working women
- Unmarried shoppers buy takeout food at the supermarket more often than married shoppers.
- Shoppers who live alone use the supermarket with greater frequency than those in larger households.
- Shoppers aged 65 or older take out from supermarkets twice as often as shoppers under 50.
- Shoppers with household incomes of $35,000 of less use supermarkets more often than others.

TABLE 29

SOURCE OF TAKEOUT FOOD, 1986-1992

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, convenience store, or from some other place?*[1]

Base: The shopping public

	Jan. 1986 Total	Jan. 1987 Total	Jan. 1988 Total	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	**Jan. 1992 Total**
Base[2]	1,004	1,007	1,019	1,031	514	1,004	**1,000**
	%	%	%	%	%	%	**%**
Fast-food restaurant	43	44	41	41	46	51	**55**
From a restaurant	38	33	38	33	27	23	**24**
From a supermarket	10	9	11	12	14	14	**12**
From a convenience store	x	x	x	x	2	2	**2**
Some other place	2	7	3	6	2	1	*****
It varies (volunteered)	1	1	1	3	4	5	**3**
Don't eat out	x	x	x	7	6	4	**4**
Not sure	3	3	4	1	*	1	**1**

x = Not asked

*Less than 0.5 percent

[1]In 1986-1989, question was worded "Would you say most often from a fast-food store, a carryout section of a restaurant, a carryout section of a supermarket, or from some other place?"

[2]1990 split sample

TABLE

30

USE OF SUPERMARKETS AS SOURCES OF TAKEOUT FOOD

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, a convenience store, or from some other place?*

Base: The shopping public

	Jan. 1992 Base		Use Supermarket For Takeout Food 1991	1992
Total	1,000	%	14	**12**
Sex				
Men	247	%	16	**9**
Female	753	%	13	**13**
Working	408	%	11	**10**
Nonworking	338	%	16	**17**
Marital Status				
Married	658	%	12	**11**
Not married	340	%	17	**14**
Size of Household				
1	148	%	20	**17**
2	314	%	11	**16**
3-4	414	%	13	**8**
5 or more	14	%	13	**12**
Age				
18-24	58	%	14	**5**
25-39	402	%	11	**10**
40-49	194	%	10	**9**
50-64	191	%	16	**15**
65 or older	150	%	26	**23**
Income				
$15,000 or less	172	%	19	**19**
$15,001-$25,000	186	%	15	**11**
$25,001-$35,000	157	%	15	**15**
$35,001-$50,000	196	%	9	**7**
$50,001 or more	168	%	8	**10**

"WAYS TO TAP NEW MARKETS: VIDEO RENTAL AND SALE IS BECOMING AN INCREASINGLY IMPORTANT GROWTH CATEGORY FOR SUPERMARKETS. IN FACT, SEVERAL SUPERMARKETS ARE ALREADY ON THE TOP-20 LIST OF VOLUME RENTALS NATIONALLY."

CHAPTER 5

NEW PRODUCTS AND SERVICES

AVAILABILITY

Nearly all shoppers can find in their supermarket food products designed especially for microwave cooking (95 percent), private label or store brands (95 percent), and delicatessen or other carryout food items (87 percent). Availability of products and services has changed little since 1991. Only two items are more widely available in 1992:

- Unpackaged or bulk food (up 10 points to 61 percent)
- Home delivery (up six points to 14 percent)

At least two out of three supermarkets now offer gourmet or specialty foods (73 percent) and a floral department (69 percent). After the availability of gourmet foods declined from 1989 to 1990, they are now more widely available than in any year since 1988 (see Table 31). At least one out of two shoppers say that five or more items are available in their principal supermarket:

- Unpackaged or bulk food (61 percent)
- Fresh, not frozen, pizza (57 percent).
- A salad bar (52 percent).
- Postage stamps (51 percent).
- Videos or movies for rent, not sale (51 percent).
- Only two out of five shoppers say that their supermarket actually sells videos (40 percent). Food catering (49 percent) and a prescription drug counter (41 percent) are the only other items mentioned as availability at least two out of five shoppers. Prescription drug counters are slowly gaining acceptance (up 11 percentage points since 1990). Another one in three shoppers say their supermarket accepts credit cards for purchases (33 percent). Despite the reported increased availability of home delivery, it is by far the least widely available service (14 percent).

TABLE

31

AVAILABILITY OF STORE PRODUCTS AND SERVICES

Q: *Thinking about the supermarket where you do most of your shopping, does it carry or have (READ EACH ITEM)?*

Base: The shopping public

	Jan. 1986 Yes	Jan. 1987 Yes	Jan. 1988 Yes	Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1991[1] Yes	Jan. 1992[2] Yes	Jan. 1992[2] No	Jan. 1992[2] Not Sure
	%	%	%	%	%	%	%	%	%
Food products designed especially for microwave cooking	86	89	93	94	93	94	**95**	3	2
Private label or store brands	X	X	X	X	93	94	**95**	3	3
Delicatessen or other carryout food items	74	78	80	82	80	87	**87**	12	1
Gourmet or specialty foods	70	72	74	66	56	70	**73**	21	7
Floral department	X	X	X	X	X	69	**69**	30	2
Unpackaged or bulk food	54	61	56	55	58	51	**61**	32	7
Fresh, not frozen, pizza	47	52	47	53	51	52	**57**	35	8
A salad bar[4]	51	37	40	42	38	48	**52**	47	2
Postage stamps	X	29	34	46	46	51	**51**	29	20
Videos or movies for rent, rather than for sale[3]	X	38	44	50	47	49	**51**	43	7
Food catering	38	41	45	47	49	47	**49**	41	10
Videos or movies for sale, rather than for rent	X	X	X	X	X	X	**40**	48	12
Prescription drug counter	X	X	27	31	30	36	**41**	57	2
Credit cards accepted for purchase	X	X	X	X	X	X	**33**	38	30
Home delivery	X	X	X	X	X	8	**14**	75	11

X = Not asked

[1]Split sample, bases = 500 and 504

[2]Split sample, bases = 495 and 505

[3]In 1991 and earlier, shoppers were asked if their supermarket offered video rentals

[4]In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."

May not add up to 100 percent due to rounding

Using Store Products and Services

As part of their weekly shopping trip, the largest percentage of shoppers use four products and services.

- Private label or store brands (51 percent)
- Food products designed especially for microwave cooking (33 percent).
- Unpackaged or bulk foods (29 percent)
- Delicatessen or other carryout food items (28 percent).

With the exception of unpackaged or bulk foods, the most widely used items are also the most widely available. Notably, private label or store brands—an item significantly more important to 1992 than 1991 shoppers (see Table 1)—is also the type of item most likely to be purchased on a weekly basis. At least one in 10 report weekly use of the salad bar (15 percent), video rentals (14 percent) or gourmet items (10 percent).

As in earlier *Trends*, shoppers whose supermarket provides a specific product or service were asked how often they used it. In contrast to prior years, however, shoppers were asked to quantify their usage (e.g., at least once a week, one-to-three times a month, etc.) rather than reporting it on a scale ranging from "frequently" to "never" (see Table 32). Owing to this methodological change, trend data on usage are not comparable and are not reported for 1991 and earlier.

TABLE 32

SHOPPERS' USE OF STORE PRODUCTS AND SERVICES

Q: *Thinking about the supermarket where you shop, how often do you use or purchase (READ EACH ITEM)?*

Base The shopping public who say their supermarkets have the product or service[1]

	Frequency of Use				
	At Least Once a Week	1-3 Times A Month	Less Than Once a Month	Never	Not Sure
	%	%	%	%	%
Private label or store brands	51	32	8	6	3
Food products designed especially for microwave cooking	33	29	14	23	1
Unpackaged or bulk food	29	29	15	25	2
Delicatessen or other carryout food items	28	37	21	13	*
A salad bar	15	20	18	47	*
Videos or movies for rent, rather than for sale	14	20	13	53	*
Gourmet or specialty foods	10	36	37	17	*
Credit cards accepted for purchase	7	6	6	80	1
Postage stamps	5	36	21	37	1
Fresh, not frozen, pizza	4	29	34	33	*
Prescription drug counter	3	19	22	52	3
Videos or movies for sale, rather than for rent	3	7	18	71	1
Floral department	2	15	48	35	1
Food catering	2	7	25	65	1
Home delivery	1	1	6	92	0

x = Not asked

*Less than 0.5 percent

[1]Split sample, bases = 495 and 505

May not add up 100 percent due to rounding

Potential Use of Store Products and Services

Where supermarkets do not carry a particular item, five areas were named by more than 15 percent of shoppers as products or services they would use at least once a week (Table 33):

- Private label or store brands (31 percent)
- Food products designed especially for microwave cooking (29 percent).
- Delicatessen or other carryout food items (28 percent)
- Video rentals (19 percent).
- Salad bar (16 percent).

TABLE

33

POTENTIAL USE OF STORE PRODUCTS AND SERVICES

Q: *If your supermarket carried or had (READ EACH ITEM), how often do you think you would use or purchase it?*

Base: The shopping public who say their supermarkets do not have the product or service[1]

	Potential Frequency of Use				
	At Least Once a Week	1-3 Times A Month	Less Than Once a Month	Never	Not Sure
	%	%	%	%	%
Private label or store brands	31	31	0	38	0
Food products designed especially for microwave cooking	29	21	21	29	0
Delicatessen or other carryout food items	28	20	13	34	5
Videos or movies for rent, rather than for sale	19	17	7	54	3
A salad bar	16	21	19	41	3
Gourmet or specialty foods	15	29	20	34	2
Unpackaged or bulk food	14	30	9	39	7
Fresh, not frozen pizza	12	30	13	41	5
Postage stamps	10	29	14	43	3
Credit cards accepted for purchase	9	9	6	73	4
Home delivery	8	12	9	67	4
Prescription drug counter	5	19	25	46	5
Video movies for sale, rather than for rent	3	8	15	72	2
Floral department	1	15	34	48	1
Food catering	1	6	22	65	5

N = Not asked

*Less than 0.5 percent

[1]Split sample, bases = 495 and 505

May not add up to 100 percent due to rounding

CHAPTER 6

CONSUMER ACTIVISM AND THE ENVIRONMENT

GENERAL CONSUMER ACTIVISM

Consumer activism attained new heights in 1992. As before, refusing to buy products that cost too much was the primary action that shoppers have taken. Nine out of 10 shoppers now say they have done so (90 percent)—nearly twice the number who have taken any other single action (Table 34).

Less widely practiced actions have idealistic, not economic, roots. Half of all shoppers have refused to purchase a product because they disagree with the manufacturer's policies (53 percent). Nearly as many did so because of the potential for unethical treatment of animals (46 percent). Environmental concerns have weakened: fewer than two in five have refused to make a purchase owing to unnecessary or unrecyclable packaging (38 percent). Fewer than one in five have joined an organized consumer boycott (16 percent).

Participation in *all* consumer activities is above levels reported in 1991 and the early 1980s (Table 34). Differences between 1990s shoppers and those in the 1980s may reflect real behavioral changes Caution must be exercised in comparing these findings since the question wording varies from decade to decade.

Willingness to participate in consumer activities is at an new high for all items. Shoppers who have not already participated in a particular activity were further asked their future willingness to do so. When combining this number with those who say they would be "very likely" to participate in the specified activity, consumer activity increases significantly for all items. Shoppers in 1992 are more likely than those in 1984 to express a propensity for all actions except joining an organized consumer boycott (see Table 35). Contradicting the 1984 to 1991 decline, 1992 shoppers are now equally as willing as those in 1984 to boycott a product or store (25 percent).

TABLE 34

ACTIONS CONSUMERS HAVE TAKEN

Q: *First, I'd like to know if you personally have already done any of the following.*

Base: The shopping public

	Have Already Done				January 1992		
	Jan 1982	Jan. 1983	Jan. 1984**	Jan. 1991	Yes	No	Don't Know
Refuse to buy products that cost too much	77%	70%	72%	84%	**90%**	9	1
Refuse to buy products manufactured by companies whose policies you do not agree with	x	x	x	47%	**53%**	44	4
Refuse to buy products where ethical treatment of animals may be called into question	x	x	x	38%	**46%**	48	6
Refuse to buy products because of unrecyclable or unnecessary packaging	x	x	x	30%	**38%**	60	3
Join an organized consumer boycott against particular products or stores	8%	7%	9%	13%	**16%**	83	1

x = Not asked

Numbers may not add to 100 percent owing to rounding

**In 1984 and earlier, respondents were asked "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done" or "ready to do"

TABLE

35

ACTIONS CONSUMERS HAVE DONE OR ARE LIKELY TO DO

Q: *First, I'd like to know if you personally have already done any of the following*

Q: *How likely would you be to (READ EACH ITEM)? Please use a 5-point scale where "1" means "not at all likely" and "5" means "very likely."*

Base: The shopping public

	Have Already Done or Are Very Likely to Do				
	Jan. 1982	Jan. 1983	Jan. 1984**	Jan. 1991	**Jan. 1992**
Refuse to buy products that cost too much	85%	77%	79%	87%	**93%**
Refuse to buy products manufactured by companies whose policies you do not agree with	x	x	x	57%	**62%**
Refuse to buy products where ethical treatment of animals may be called into question	x	x	x	48%	**56%**
Refuse to buy products because of unrecyclable or unnecessary packaging	x	x	x	38%	**46%**
Join an organized consumer boycott against particular products or stores	27%	23%	25%	21%	**25%**

x = Not asked

**In 1984 and earlier respondents were asked "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done" or "ready to do

Responsibility for Ensuring That Products Are Environmentally Safe

Shoppers rely most on manufacturers or food processors (33 percent) and government agencies or institutions (29 percent) to ensure that the food and nonfood products they buy in their supermarket are environmentally safe and friendly. This is nearly three times the percentage who depend on any other single source. Another one in 10 shoppers feel that responsibility lies with food stores (12 percent) and slightly fewer rely on everyone equally, including themselves and consumer organizations (Table 36).

In the past year, responsibility moved away from manufacturers, individuals and consumer groups. More shoppers now shift this responsibility to government institutions and food stores.

TABLE 36

PRIMARY RESPONSIBILITY FOR ENSURING THAT PRODUCTS ARE ENVIRONMENTALLY SAFE

Q: *Who do you feel should be primarily responsible for ensuring that the food and nonfood products you buy in your supermarket are environmentally safe and friendly?*

Base: The shopping public

	Jan. 1991 Total	**Jan. 1992 Total**
Base	1,004	**1,000**
	%	**%**
Manufacturers/food processors	37	**33**
Government institutions or agencies	24	**29**
Food stores	9	**12**
All are responsible	3	**8**
Yourself as an individual	12	**7**
Consumer groups/organizations	9	**6**
Farmers	2	**2**
No one	1	**0**
Other	0	*****
Not sure	4	**3**

*Less than 0.5 percent

TIONAL CONTENT OF FOOD IS AT AN ALL-TIME HIGH UP TO 64% VERSUS 56% LAST YEAR AND THE LOW OF 54% IN 1987 SPECIFIC CONCERNS ARE SHIFTING MORE IN THE DIRECTION OF FAT AND AWAY FROM CHOLESTEROL."

CHAPTER 7

NUTRITION

EVALUATION OF DIET

Shoppers continue to see substantial room for improvement in their diets (Table 37). **Two out of three think their diet could be at least somewhat healthier (66 percent).** Only one in 10 believe that their diet is as healthy as it could possibly be—although another 23 percent say it is healthy enough (Table 37).

Certain demographic groups are more likely to report that their diet could be at least somewhat healthier:

- Working women.
- Shoppers from households with children.
- Shoppers under age 65.
- Shoppers whose 1991 household income exceeds $15,000.

In the past year **the proportion of shoppers who believe that their diet needs improvement declined by three percentage points, bringing the number back to 1990 levels**

Eating more fruits and vegetables continues to be the primary way that shoppers ensure themselves of a healthy diet (60 percent). This behavior is reported twice as often as any other Three out of 10 shoppers either eat less meat in general or red meat (31 percent) or consume less fats and oils (28 percent). Eating more chicken, turkey or white meat (14 percent), cutting down on sugar and snack foods (12 percent each) and eating more fish (10 percent) are the only other behaviors mentioned by at least one in 10 (see Table 38)

Concern over sugar and cholesterol appears to be dropping Fewer 1992 than 1991 shoppers say they eat:

- Less sugar (down seven points to 12 percent).
- Less cholesterol (down four points to 8 percent).

Despite the fact fewer shoppers are cutting down on cholesterol, they are curtailing intake of foods generally associated with cholesterol. More so than a year ago, shoppers today eat less snack foods (up eight points to 12 percent) and dairy products (up three points to 7 percent).

Shoppers are reducing their consumption of three items—fiber, fish and fresh foods. The proportion who say they eat more of these items has dropped significantly over the past year.

- More fiber (down eight points to 8 percent).
- More fish (down four points to 10 percent).
- More fresh foods (down four points to 3 percent)

TABLE

37

EVALUATION OF DIET, 1989-1992

Q: *Thinking of all the foods you eat at home and away from home, how would you describe your diet? Would you say that it could be a lot healthier, could be somewhat healthier, is healthy enough, or is as healthy as it could possibly be?*

Base: The shopping public

	Could Be At Least Somewhat Healthier				Jan. 1992				
	Jan. 1989	Jan. 1990	Jan. 1991	**Jan. 1992**	Could Be a Lot Healthier	Could Be Somewhat Healthier	Is Healthy Enough	Is as Healthy as It Could Possibly Be	Not Sure
	%	%	%	%	%	%	%	%	%
Total	67	65	69	**66**	17	50	23	11	1
Sex									
Men	63	63	71	**66**	15	51	24	11	0
Women	68	65	68	**66**	17	49	22	11	1
Working	73	72	71	**72**	19	53	21	7	1
Nonworking	63	57	63	**61**	15	46	23	15	1
Type of Household									
With children	74	70	73	**70**	18	52	23	8	0
No children	61	59	65	**63**	16	48	22	13	1
Age									
18-24	75	77	79	**69**	24	45	21	10	0
25-39	73	70	76	**72**	17	55	21	7	0
40-49	77	71	70	**75**	19	57	20	5	0
50-64	59	58	66	**64**	17	47	19	16	1
65 or older	49	45	51	**42**	9	33	34	22	2
Income									
$15,000 or less	63	64	61	**55**	18	37	22	22	1
$15,001-$25,000	65	65	70	**65**	22	43	25	10	1
$25,001-$35,000	70	69	75	**72**	14	58	20	8	0
$35,001-$50,000	69	58	74	**69**	13	57	24	7	0
$50,001 or more	68	69	72	**74**	14	61	21	3	1

Factors for Food Selection

Taste remains the most important consideration when shopping for food. Nine out of 10 shoppers consider taste very important. It outweighs nutrition (77 percent), product safety (71 percent) and even price (75 percent). Of these top-rated factors, only price grew in importance (up four percentage points), which ties in with other economizing behaviors and attitudes. Price has now displaced product safety as the third most important consideration (Table 39).

Just as shoppers tend to be eating more fruits and vegetables to ensure a healthy diet, they tend to place more importance on nutrition today, up two percentage points from a year ago, (see Table 38). The importance of nutrition in food selection differs among shopper subgroups (Table 40). Households with children continue to be an anomaly. While more people from these households feel there is room for dietary improvement (Table 37), they are no more likely than childless households to feel that nutrition is "very" important. Other differences

- More women than men rate nutrition as very important.
- Just as younger shoppers tend to rate their diets as less healthful than older shoppers, they place less value on nutrition. Shoppers aged 50 to 64 attach the most importance to nutrition; shoppers under 25 attach the least importance.
- Shoppers who buy food for someone on a restricted diet consider nutrition more important than others.

TABLE

38

DIETARY BEHAVIOR

Q: *What, if anything, are you eating more or less of to ensure that your diet is healthy?*

Base: The shopping public

	Jan. 1989 Total	Jan. 1990 Total	Jan. 1991 Total	**Jan. 1992 Total**
Base	1,031	1,005	1,004	**1,000**
	%	%	%	**%**
More fruits/vegetables	59	57	57	**60**
Less meat/red meat	33	34	34	**31**
Less fats/oils	22	27	25	**28**
Eating more chicken/turkey/white meat	16	19	16	**14**
Less sugar	20	19	19	**12**
Less snack foods	N	N	4	**12**
Eating more fish	18	18	14	**10**
More fiber	13	16	16	**8**
Less cholesterol	12	15	12	**8**
Less salt	13	15	10	**8**
Less fried foods	10	14	7	**7**
Less dairy/butter/cheese/whole milk	N	N	4	**7**
More starch/rice/potato/pasta	N	N	3	**5**
More balanced diet/wider variety	3	5	2	**4**
More fresh foods	8	6	7	**3**
Fewer calories	5	5	4	**3**
More protein	5	4	3	**2**
More beef/better cuts of meat	N	N	N	**2**
More dairy products	N	N	N	**2**
More vitamin/mineral supplements	2	1	2	**2**
More whole grain	N	N	N	**2**
More juices	N	N	N	**2**
More organically grown/natural foods	2	2	2	**1**
More foods high in vitamins/minerals	2	1	1	**1**
More low-fat/skim milk	N	N	N	**1**
Other	20	11	9	**12**
Nothing	5	7	6	**4**
Not sure	3	3	3	**3**

N = Not asked

Multiple responses accepted

TABLE

39

IMPORTANCE OF VARIOUS FACTORS IN FOOD SELECTION

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. 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 shop for food.*

Base: The shopping public

	Very Important				Jan. 1992				
	Jan. 1988	Jan. 1989	Jan. 1990	Jan. 1991	**Very Important**	Somewhat Important	Not Too Important	Not at All Important	Not Sure
	%	%	%	%	%	%	%	%	%
Taste	88	87	88	90	**89**	8	1	1	*
Nutrition	72	76	75	75	**77**	19	3	1	*
Price	65	64	66	71	**75**	21	3	1	0
Product safety	83	74	71	72	**71**	20	6	1	2
Storability	53	40	43	43	**46**	34	14	3	3
Product packaging that can be recycled	x	x	x	48	**45**	34	14	6	1
Food preparation time	x	37	36	38	**41**	33	18	7	1
Ease of preparation	39	36	33	34	**36**	42	17	4	1

x = Not asked

*Less than 0.5 percent

May not add to 100 percent due to rounding

TABLE

40

IMPORTANCE OF NUTRITION IN FOOD SELECTION

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. 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 shop for food. **How important is nutrition?***

Base: The shopping public

	Jan 1992 Base	Jan 1992 Very Important	Somewhat Important	Not Too Important	Not at All Important	Not Sure
	%	%	%	%	%	%
Total	1,000	77	19	3	1	*
Sex						
Men	215	66	24	7	3	1
Women	785	81	17	1	*	*
Working	411	79	19	2	1	0
Nonworking	366	83	15	1	*	1
Age						
18-24	78	65	30	4	1	0
25-39	351	76	21	3	1	0
40-49	205	76	21	1	2	1
50-64	200	85	14	2	1	0
65 or older	150	81	13	3	1	1
Type of Household						
With children	458	79	19	1	*	0
No children	529	76	18	3	2	1
Medically Restricted Diet						
Yes	160	89	9	1	1	0
No	827	75	21	3	1	*

*Less than 0.5 percent

Nutritional Content

A far greater number of shoppers are "very" concerned about the nutritional content of the foods they eat, although they do not place any greater emphasis on the role of nutrition in food selection (Tables 38, 41). Nearly all shoppers remain at least somewhat concerned with nutritional content (96 percent) and significantly more are "very" concerned (up eight points in 1992 to 64 percent). This increased concern is expressed among virtually all subgroups (Tables 41, 42). Exceptions are shoppers under age 25, Midwesterners and those who believe their diet is healthy enough.

The proportions who are "very" concerned about nutrition vary by subgroups (see Tables 41, 42).

- The proportion increases with age.
- Fewer Midwestern shoppers are very concerned about nutritional content than those elsewhere.
- Shoppers who live with someone on a restricted diet are more likely to be very concerned.
- More shoppers who are satisfied with the healthfulness of their diet express strong nutritional concerns than others.
- More college-educated shoppers are very concerned than others.

TABLE

41

SHOPPER CONCERN ABOUT NUTRITIONAL CONTENT, 1983-1992

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of the food you eat?*

Base: The shopping public

		Very Concerned							1992			
		1983	1986	1987	1988	1989	1990	1991	**Very Concerned**	Somewhat Concerned	Not Very Not at All Concerned	Not Sure
Total	%	59	58	54	56	55	55	56	**64**	32	4	0
Sex												
Men	%	51	55	48	48	[illegible]	50	49	**55**	38	7	0
Women	%	60	58	55	58	57	56	59	**67**	30	3	0
Working	%	60	54	49	53	51	51	58	**65**	33	2	0
Nonworking	%	62	62	62	64	63	64	60	**69**	27	4	0
Type of Household												
With children	%	62	57	52	52	53	52	51	**62**	36	3	0
No children	%	56	58	55	59	57	58	60	**66**	30	5	0
Age												
18-24	%	52	55	41	33	[illegible]	41	44	**47**	48	7	0
25-39	%	56	54	47	51	51	48	51	**59**	38	3	0
40-49	%	63	49	54	52	57	52	51	**63**	35	2	0
50-64	%	62	68	66	66	65	62	67	**72**	25	[illegible]	0
65 and older	%	58	65	69	72	63	74	65	**75**	17	8	0
Region												
East	%	65	58	58	54	53	56	53	**69**	27	4	0
Midwest	%	53	53	49	52	53	47	55	**58**	38	4	0
South	%	59	59	56	60	56	61	58	**66**	30	4	0
West	%	57	62	53	56	61	56	60	**64**	32	4	0

TABLE

42

SHOPPER CONCERN ABOUT NUTRITIONAL CONTENT, 1990-1992

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned, or not at all concerned about the nutritional content of the food you eat?*

Base: The shopping public

	Jan. 1990	Jan. 1991	January 1992			
	Very Concerned	Very Concerned	**Very Concerned**	Not Very, Somewhat Concerned	Not at All Concerned	Not Sure
	%	%	%	%	%	%
Total	55	56	**64**	32	4	0
Medically Restricted Diet						
Yes	70	69	**81**	16	3	0
No	51	53	**59**	36	4	0
Description of Diet						
Healthy enough	66	70	**73**	22	6	0
Could be healthier	49	50	**60**	37	3	0
Education						
High school or less	56	53	**60**	35	5	0
Some college college graduate	54	60	**68**	29	3	0

May not add to 100 percent due to rounding

The overall level of concern about nutrition increased dramatically over the past year. This may be due, in part, to the larger proportions of 1992 shoppers who are concerned about fat content (up eight points from 1991 to 50 percent—Table 43). Cholesterol levels remain the next most frequently mentioned concern although this declined by a significant margin (down seven points to 30 percent).

The drop in concern about cholesterol ties in with the smaller proportion of shoppers who reduce their cholesterol intake to insure that their diet is healthy. (See Table 38). **Concern about cholesterol is now at its lowest level in four years (See Table 43). Increasing concern over fat content is supported only by marginal changes in the proportion of shoppers who consume less fats and oils** (down three percentage points). **Concern about fats is now at an historical high**—and nearly double what it was as recently as 1988.

Salt content (21 percent), sugar content (13 percent) and preservatives (11 percent) also are of concern to at least one in 10 shoppers (Table 43). After a drop from 1990 to 1991, this concern for the latter two items has stabilized. Only for preservatives does a significantly greater proportion of 1992 shoppers express concern (up three percentage points from 1991). This marks the first year since 1988 that concern over preservatives has increased.

In addition to cholesterol, **the level of concern about the nutritional content of four other items dropped significantly (Table 43).**

- **Vitamin and mineral content** (down seven points to 8 percent).
- Desire to be healthy and eat what's good (down six points to 2 percent).
- Calories (down three points to 9 percent).
- Food/nutritional value (down three points to 5 percent).

Shoppers' perceptions of the extent to which certain nutritional items constitute health hazards reflect their nutritional concerns (Tables 43, 44). **Fats (58 percent) and cholesterol (52 percent) remain the most serious health hazards when consumers are asked to volunteer their concerns in unaided questions. Although concern over fats increased over the past year in the response to the unaided question, the proportion who consider it a "serious hazard" in aided questions declined by four percentage points.** Consistent with the smaller number who are concerned about cholesterol, fewer shoppers view it as a serious health hazard (down six points to 52 percent).

- The number of shoppers who consider salt and sugar hazardous falls well below that for fats and cholesterol and remains unchanged from last year.

TABLE

43

NATURE OF CONCERN ABOUT NUTRITIONAL CONTENT, 1984-1992

Q: *What is it about the nutritional content of what you eat that concerns you and your family most?*

Base: Shoppers who are at least somewhat concerned about the nutritional content of foods

	1984 Total	1985 Total	1986 Total	1987 Total	1988 Total	1989 Total	1990 Total	1991 Total	**1992 Total**	1991-1992 Percentage Point Change
	%	%	%	%	%	%	%	%	%	
Fat content, low fat	8	13	17	16	27	29	46	42	**50**	+8
Cholesterol levels	8	10	13	14	22	38	44	37	**30**	−7
Salt content, less salt	17	19	20	22	26	25	30	22	**21**	−1
Sugar content, less sugar	22	20	18	16	20	15	16	12	**13**	+1
Preservatives	17	13	15	14	16	9	7	8	**11**	+3
Calories, low calories	9	9	11	14	14	15	19	12	**9**	−3
Chemical additives	25	18	16	10	12	7	4	8	**9**	+1
Vitamin/mineral content	19	17	22	21	21	21	14	15	**8**	−7
Food/nutritional value	19	14	11	13	14	8	6	8	**5**	−3
Freshness, purity, no spoilage	12	8	8	8	15	6	4	4	**5**	+1
Ingredients/content	0	0	0	0	8	4	4	6	**5**	−1
Making sure we get a balanced diet	9	11	14	14	11	10	4	5	**4**	−1
Chemicals	0	0	0	0	4	3	3	4	**4**	0
Processed foods	0	0	0	0	3	1	1	1	**3**	+2
Fiber content	1	2	3	4	5	5	5	3	**2**	−1
Desire to be healthy/eat what's good for us	0	3	6	7	7	6	3	8	**2**	−6
Protein value	6	4	5	4	6	4	2	4	**2**	−2
As natural as possible/not overly processed	6	5	3	0	4	3	2	3	**2**	−1
Less red meat	0	2	2	0	3	3	2	1	**2**	+1
Quality of food	5	1	1	0	0	3	2	3	**2**	−1
No harmful ingredients, nothing that causes illness/cancer	6	5	5	0	0	2	2	2	**2**	0
Carbohydrate content	2	2	2	2	3	2	1	2	**2**	0
Empty calories, junk food	4	5	2	7	6	2	*	2	**2**	0
Artificial sweetener	0	2	1	*	0	1	1	1	**1**	0
Excess food coloring, dyes	4	3	2	3	0	1	*	1	**1**	0
Not sure/refused	5	6	5	7	2	7	6	9	**8**	−1

*Less than 0.5 percent

Multiple responses accepted

TABLE

44

CONSUMER CONCERN ABOUT SELECTED NUTRITIONAL ATTRIBUTES, 1985-1992

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?*

Base: The shopping public

	Serious Hazard							1992			
	1985	1986	1987[1]	1988[2]	1989	1990	1991	**Serious Hazard**	Something of a Hazard	Not a Hazard At All	Not Sure
	%	%	%	%	%	%	%	%	%	%	%
Fats	42	44	55	61	58	54	62	**58**	**36**	5	1
Cholesterol	44	48	51	59	61	47	58	**52**	**41**	6	2
Salt in food	39	40	43	42	44	34	32	**30**	**57**	11	2
Sugar in food	29	29	28	28	23	17	18	**17**	**56**	26	2

[1]Split sample, bases = 498 and 509

[2]Split sample, bases = 508 and 511

May not add to 100 percent due to rounding

Food Preparation Behavior

Nearly two-thirds of shoppers say they have been cooking or preparing foods differently in the past three to five years. This is significantly more than the number who did so two years ago (up four points to 65 percent). Shopper demographics clearly differentiate subgroups with respect to food preparation behavior (Table 45):

- Women are more likely than men to have changed cooking methods in the past three to five years.
- Shoppers aged 25 to 64 are more likely than either the oldest or youngest shoppers to have done so.
- Shoppers who live with someone on a medically restricted diet are more likely to have changed.

TABLE 45

CONSUMERS WHO'VE CHANGED FOOD PREPARATION METHODS, 1987-1992

Q: *In the past three to five years, have you been cooking or preparing food differently than you used to?*

Base: The shopping public

	Jan 1987 Yes	Jan. 1988 Yes	Jan 1989 Yes	Jan 1990 Yes	Jan. 1992 Yes	Jan. 1992 No	Jan. 1992 Not Sure
	%	%	%	%	%	%	%
Total	64	67	55	61	**65**	35	1
Sex							
Men	56	55	49	52	**55**	45	*
Women	66	70	56	63	**68**	31	1
Working	66	71	56	64	**70**	29	1
Nonworking	66	68	56	62	**65**	34	1
Type of Household							
With children	63	64	54	64	**63**	36	*
No children	65	69	55	58	**66**	33	1
Age							
18-24	56	60	39	49	**55**	43	2
25-39	59	65	56	62	**64**	35	1
40-49	71	71	57	63	**67**	33	1
50-64	64	73	60	68	**73**	27	1
65 or older	70	65	56	51	**58**	41	1
Region							
East	68	67	52	54	**58**	42	0
Midwest	65	69	57	63	**66**	33	1
South	64	64	55	64	**69**	31	0
West	58	69	55	62	**63**	36	1
Medically Restricted Diet							
Yes	N	N	68	70	**72**	27	1
No	N	N	51	58	**63**	37	1

N = Not asked

*Less than 0.5 percent

Question not asked in 1991

The predominant changes since *Trends* last asked this question in 1989 are less frying (up seven points to 44 percent) and adding less fat (up seven points to 27 percent), reflecting shoppers' increased concerns about fat. Some shoppers make greater use of broiling (22 percent), baking or roasting (17 percent) and steaming (10 percent). Another one in eight have cut down on salt (12 percent).

The proportions of shoppers who say they are reducing their intake of cholesterol (down eight points to 7 percent) and eating less red meat (down eight points to 4 percent) are below the levels reported in 1989. These findings are consistent with the smaller proportion who rate cholesterol as a health hazard (Table 44) and the declining percentage who have reduced their cholesterol intake to ensure a healthy diet (Table 38) Concern about fats and decreasing concern about cholesterol may seem inconsistent, yet actually may reflect greater awareness among shoppers of the complex factors affecting cholesterol, including nondietary ones.

Other ways in which shoppers have significantly altered their food preparation behavior (Table 46).

- Continuing the trend noted in 1989, fewer shoppers have reduced the amount of salt they use (down 12 points to 12 percent).
- After an increase in use from 1988 to 1989, shoppers now use the microwave with much less frequency (down 13 points to 9 percent).
- The number of shoppers who eat more vegetables and fresh foods continues to decline (down four points to 7 percent).

TABLE

46

HOW CONSUMERS PREPARE FOODS DIFFERENTLY FROM THREE TO FIVE YEARS AGO (Volunteered), 1988-1992

Q: *How are you cooking or preparing foods differently?*

Base. Those who cook or prepare food differently from three to five years ago

	Jan 1988 Total	Jan 1989 Total	**Jan. 1992 Total**
Base	682	552	**649**
	%	%	**%**
Less frying	35	37	**44**
Less added fat	29	20	**27**
More broiling	20	18	**22**
Baking/roasting more	13	14	**17**
Less salt	40	24	**12**
More steaming	10	6	**10**
More microwaving	17	22	**9**
Less cholesterol	18	15	**7**
Eating more vegetables/fresh foods	20	11	**7**
Less oil/use vegetable, olive oil	N	N	**7**
More fish/chicken	**	6	**6**
Eating less red meat	15	12	**4**
Less sugar	17	8	**4**
Changing barbecue use	1	3	**4**
More margarine	3	3	**3**
Stir fry	N	N	**3**
Changing use of fast foods prepared foods	5	5	**2**
Eating more fruit	4	4	**2**
Wider variety/more recipes	5	3	**2**
Fewer calories	7	4	**2**
Changing spices	4	1	**2**
Less butter	N	N	**2**
Changing length of cooking time	3	1	**1**
Fewer sauces	*	1	**1**
Eating smaller quantities	3	2	**1**
Consumption of desserts	2	1	*****
Other	23	21	**9**
Not sure	1	1	**2**

N = Not mentioned

*Less than 0.5 percent

** 1988
3 percent reported cooking more chicken
2 percent reported cooking more fish

Question not asked 1990-1991

Responsibility for Food Being Nutritious

Shoppers continue to assume primary responsibility for ensuring that the products they buy are nutritious (39 percent). Maintaining a trend first noted last year, shoppers are placing less responsibility with the public sector and more with private industry. Twice as many shoppers now feel that manufacturers (27 percent), rather than government agencies or institutions (14 percent), should take responsibility. This marks the third straight year that reliance on the government has declined significantly.

Fewer than one in 10 shoppers feels that product nutrition is the responsibility of food stores, consumer organization, farmers, or everyone equally. (Table 47)

TABLE

47

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE NUTRITIOUS

Q: *Who do you feel should be primarily responsible for ensuring that the food you buy from the supermarket is nutritious, the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

Base: The shopping public

	Jan 1989 Total	Jan 1990 Total	Jan 1991 Total	**Jan. 1992 Total**
Base	1,031	1,005	1,004	**1,000**
	%	%	%	**%**
Yourself as an individual	29	36	38	**39**
Manufacturers	29	21	26	**27**
Government institutions or agencies	28	23	17	**14**
Food stores[1]	4	6	6	**7**
All/everybody	x	x	3	**6**
Consumer organizations	6	7	6	**4**
Farmers	x	x	x	**2**
Other (Volunteered)	1	4	*	**0**
None (Volunteered)	*	1	*	**1**
Not sure	4	3	3	**1**

x = Not mentioned

*Less than 0.5 percent

[1]Called "retailers" in 1991 and earlier 1992

"CONFIDENCE IN THE SAFETY OF THE FOOD SUPPLY DROPPED A FULL TEN PERCENTAGE POINTS THIS YEAR FROM 82% to 72%. THE BIGGEST JUMPS WERE IN CONCERN OVER SPOILAGE AND FRESHNESS."

CHAPTER 8

FOOD SAFETY

Consumer confidence in the food supply has fallen ten percentage points over the past year. Only 72 percent of shoppers are now completely or mostly confident that the food in their supermarket is safe. This represents the lowest level since mid-1989 (65 percent), following the Alar and Chilean grape controversies.

Importance of Safety in Food Selection

Product safety continues to be an important consideration when shopping for food. More than nine out of 10 shoppers rate safety as at least somewhat important and 71 percent regard safety as very important (see Table 48). Only one subgroup change occurred over the past year: shoppers from households with children are no longer more concerned about product safety than childless households. Certain subgroups continue to place greater emphasis on product safety (see Table 48): women, the college educated and consumers who buy food for a household member on a medically restricted diet.

TABLE

48

IMPORTANCE OF PRODUCT SAFETY IN FOOD SELECTION, 1989-1992

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. 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 shop for food. How important is product safety?*

Base: The shopping public

	Jan 1989 Very Important	Jan 1990 Very Important	Jan 1991 Very Important	Jan. 1992 **Very Important**	Jan. 1992 Somewhat Important	Jan. 1992 Not Too Important	Jan. 1992 Not At All Important	Jan. 1992 Not Sure
	%	%	%	**%**	%	%	%	%
Total	74	71	72	**71**	20	6	1	2
Sex								
Men	64	64	62	**56**	27	11	4	2
Women	77	73	76	**75**	18	5	1	1
Working	74	66	72	**73**	19	6	1	1
Nonworking	79	80	81	**78**	16	4	*	2
Type of Household								
With children	77	73	78	**72**	21	4	2	1
No children	72	69	69	**71**	18	8	1	2
Age								
18-24	70	64	64	**71**	24	4	0	1
25-39	69	69	70	**66**	24	7	3	1
40-49	79	70	75	**74**	18	6	1	2
50-64	80	75	76	**75**	16	7	1	2
65 or older	74	76	74	**77**	15	5	1	3
Education								
High school or less	76	74	78	**76**	18	4	1	1
Some college or more	72	67	67	**67**	21	8	2	2
Medically Restricted Diet								
Yes	85	73	77	**84**	11	4	0	2
No	71	70	71	**69**	21	7	2	2

*Less than 0.5 percent

Confidence in the Food Supply

For the first time since 1989, confidence in the safety of the food supply declined—in a dramatic turnaround from 1991, when confidence reached a new high (82 percent). Now, only one in eight consumers are completely confident that food is safe (12 percent), although three in five (60 percent) are mostly confident. More than one in four (27 percent) now harbor doubts about food safety (Table 49). Confidence has dropped among all demographic segments.

The most prominent threat to food safety continues to be spoilage (Table 50). In fact, significantly more shoppers view spoilage as a threat now than a year ago (up nine points to 36 percent), and is double that for any other item. Fewer than one out of five shoppers continues to be concerned about pesticides, residues, insecticides and herbicides (18 percent) or spoilage due to germs (15 percent). Of concern to at least one in ten are chemicals (13 percent), freshness, shelf life or expiration date (12 percent); improper packaging and canning (10 percent); and preparation and processing of foods (10 percent). The only item that fewer 1992 than 1991 shoppers see as a threat is improper packaging and canning (down seven points to 10 percent).

Shoppers are more concerned about several threats to food safety.

- Freshness, long shelf life, expiration dates (up six points to 12 percent).
- Processing and preparation of foods (up seven points to 10 percent).
- Quality control, improper shipping and handling (up four points to nine percent).
- In keeping with the larger number who are concerned about spoilage, more shoppers than ever worry about bacteria and food contamination (up six points to 9 percent).
- Perceived threats to food safety differ by sex and level of educational attainment (Table 50). More so than others, women and shoppers with at least some college worry about pesticides and residues. Men express greater concern about the threat of chemicals.

TABLE 49

CONSUMER CONFIDENCE IN FOOD SAFETY, 1989-1992

Q: *How confident are you that the food in your supermarket is safe? Would you say you are completely confident, mostly confident, somewhat doubtful, or very doubtful?*

Base: The shopping public

	Completely or Mostly Confident				Jan. 1992				
	Jan 1989	Jan 1990	Jan 1991	**Jan. 1992**	Completely Confident	Mostly Confident	Somewhat Doubtful	Very Doubtful	Not Sure
	%	%	%	**%**	%	%	%	%	%
Total	81	79	82	**72**	12	60	24	3	1
Sex									
Men	84	82	85	**74**	15	59	24	3	0
Women	80	79	81	**71**	11	60	24	3	2
Working	80	80	80	**70**	10	60	28	2	1
Nonworking	81	78	83	**72**	12	60	21	5	2
Age									
18-24	79	90	81	**69**	17	52	29	2	0
25-39	79	81	84	**75**	11	63	22	3	1
40-49	80	78	81	**66**	7	59	29	6	0
50-64	86	78	80	**66**	14	52	29	2	3
65 or older	80	74	89	**79**	17	63	16	2	3
Region									
East	77	76	80	**68**	12	56	28	2	2
Midwest	86	82	84	**75**	12	63	21	4	*
South	82	78	83	**72**	11	61	24	3	1
West	79	81	82	**71**	14	57	25	2	2
Description of Diet									
Healthy enough	84	80	82	**76**	15	60	20	2	2
Could be healthier	79	79	82	**70**	10	59	27	3	1

TABLE

50

PERCEIVED THREATS TO FOOD SAFETY BY SEX AND EDUCATION (VOLUNTEERED)

Q: *What, if anything, do you feel are the greatest threats to the safety of the food you eat?*

Base: The shopping public

	Jan 1989 Total[1]	Jan 1990 Total	Jan. 1991 Total	**Jan. 1992 Total**	Sex		Education	
					Men	Women	High School or Less	Some Coll./ College Graduate
Base	772	1,005	1,004	**1,000**	247	753	498	500
	%	%	%	**%**	%	%	%	%
Spoilage (NET)	36	29	27	**36**	34	36	35	36
Pesticides/residues/ insecticides/herbicides	16	19	20	**18**	13	20	14	22
Spoilage/germs	X	X	16	**15**	15	15	16	13
Chemicals	11	16	15	**13**	17	12	12	15
Freshness/long shelf life/expiration dates	X	X	6	**12**	9	13	12	11
Improper packaging/ canning	17	16	17	**10**	13	9	9	10
Processing/preparation of foods	4	3	3	**10**	9	11	9	12
Bacteria/contamination	X	X	3	**9**	10	8	7	10
Quality control/improper shipping/handling, etc.	X	X	5	**9**	10	8	7	11
Unsanitary handling by supermarket employees	10	11	10	**8**	8	8	6	10
Tampering	20	14	8	**6**	8	6	5	7
Preservatives	7	8	7	**6**	6	6	4	8
Unsanitary handling by supermarket shoppers	6	4	3	**6**	4	6	5	6
Additives (nonspecific)	7	6	6	**5**	5	5	4	6
Pollution/environmental pollution	3	4	3	**3**	4	3	2	4
Bugs/pests/rats	3	3	2	**2**	1	2	2	2
Artificial coloring	2	3	1	**1**	1	1	*	1
Radiation	1	1	1	**1**	2	*	1	1
Antibiotics	1	2	2	*****	*	*	*	*
Other	6	10	4	**7**	10	6	6	9
None	2	6	3	**3**	2	3	4	2
Not sure	11	12	19	**15**	12	15	19	10

X = Not mentioned

Multiple responses accepted

[1] In 1989 this question was asked only of those who were not completely confident that the food in their supermarket is safe. Differences may be attributable to methodology.

The 1992 *Trends* once again asked shoppers to rate the extent to which various food items may pose health hazards (see Table 51). Consumer concern about specific food attributes is declining. Residues, such as pesticides or herbicides, continue to be viewed as the most serious health hazard. Three out of four shoppers believe residues constitute a serious hazard (76 percent), its lowest level since 1988. Antibiotics and hormones in poultry and livestock are the next most serious hazard (53 percent). Significantly fewer shoppers feel that irradiated foods pose a serious health hazard (down seven points to 35 percent)—in fact, nitrates now surpasses irradiation as a serious hazard (40 percent). A steadily decreasing minority are worried about additives and preservatives (26 percent) or artificial coloring (21 percent).

Responsibility for Food Safety

Shoppers continue to assume responsibility for food safety (Table 52). They remain nearly twice as likely to feel that they, themselves, should take responsibility for product safety rather than rely on any other source (40 percent). Consumers now rely nearly equally on government (21 percent) and manufacturers (20 percent)—a dramatic change from 1988 when three times as many consumers relied on the government as on industry. About one in 10 place responsibility with their food store (9 percent), and the trend toward less reliance on consumer organizations continues (5 percent).

TABLE

51

CONSUMER CONCERN ABOUT SELECTED FOOD ATTRIBUTES, 1986-1992

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?*

Base: The shopping public

	Serious Hazard						1992			
	Jan 1986	Jan. 1987[1]	Jan 1988[2]	Jan 1989	Jan 1990	Jan. 1991	**Serious Hazard**	Something of a Hazard	Not A Hazard At All	Not Sure
	%	%	%	%	%	%	%	%	%	%
Residues, such as pesticides and herbicides	75	76	75	82	80	80	**76**	19	2	3
Antibiotics and hormones in poultry and livestock	N	61	61	61	56	56	**53**	36	5	6
Irradiated foods	37	43	36	42	42	42	**35**	28	10	27
Nitrites in food	N	38	44	44	37	41	**40**	38	4	18
Additives and preservatives	33	36	29	30	26	29	**26**	62	9	4
Artificial coloring	26	24	21	28	21	24	**21**	50	24	5

N = Not asked

May not add to 100 percent due to rounding

[1]Split sample, bases = 498 and 509

[2]Split sample, bases = 508 and 511

TABLE

52

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE SAFE

Q: *As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

Base: The shopping public

	Total									
	1983	1984	1985	1986	1987[1]	1988[2]	1989	1990	1991	**1992**
	%	%	%	%	%	%	%	%	%	**%**
Yourself as an individual	46	48	38	48	45	45	41	35	39	**40**
Government	27	25	37	33	28	29	23	27	23	**21**
Manufacturers	13	11	7	8	9	7	14	19	19	**20**
Food stores[3]	5	5	6	2	5	3	10	9	8	**9**
Consumer organizations	6	9	8	9	15	15	8	7	7	**5**
All everybody	X	X	X	X	X	X	X	X	2	**4**
Farmers	X	X	X	X	X	X	X	X	X	**1**
Other (vol.)	*	1	1	*	1	1	1	2	*	**0**
None (vol.)	1	*	1	*	*	*	*	1	*	*****
Not sure	2	1	2	*	2	2	2	1	2	**1**

X = Not asked

May not add to 100 percent due to rounding

*Less than 0.5 percent

[1]Split sample, base = 498

[2]Split sample, base = 511

[3]Reported as "Retailers" in earlier years

METHODOLOGY

SELECTION OF THE SAMPLE

The data for this survey were collected from 2,000 telephone interviews conducted from January 20 to February 16, 1992. Households contacted for the survey were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of individuals with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus closely approximates the total U.S. population.

Each household selected was screened by the following three criteria:

■ Male or female head of household

■ Having primary or equally shared responsibility for food shopping

■ Having shopped for groceries in the past two weeks.

Included were only heads of households who have primary or equally shared responsibility for food shopping, and who had shopped for groceries in the past two weeks. Eligible respondents were randomly assigned to one of two versions of the questionnaire. Equal numbers of shoppers (n = 1,000) completed Version A (Shopping Habits) and Version B (Nutrition/Food Safety). Data are presented in aggregate where questions are common to both versions. Shopper characteristics differ little by version and are profiled in Table 53.

40 percent male heads of households. The sample was then weighted to an 80 percent female/20 percent male ratio to approximate the actual proportions of female and male food shoppers and to maintain comparability with previous studies in the *Trends* series. Given the relatively similar distributions of primary food shoppers by sex in the 1991 and prior surveys, the effect of this one-time change in the sampling methodology is minimal.

So that the 1992 *Trends* surveys in the United States, Canada, Europe and Australia may be compared, the U.S. sample was not controlled for sex of respondent. Rather, male and female head of households who met the other screening criteria were interviewed as they "fell out." This was begun in 1991 so that these *Trends* data and that for subsequent surveys in this series could be compared to similar international data. This procedure resulted in a 75 percent/25 percent ratio of females to males (compared with an 80 percent/20 percent ratio in prior years). The resultant sample is a nationwide cross section of shoppers. Therefore, all subpopulation percentages are projectable to the U.S. shopping public as a whole.

Through 1990, the *Trends* sample was controlled to consist of 60 percent female heads of households and

TABLE

53

DEMOGRAPHIC PROFILE OF SUPERMARKET SHOPPERS, 1992

Base: The shopping public

	Number In Total Sample	Percentage In Version A Sample	Percentage In Version B Sample
		%	%
Total	2,000	100	100
Sex			
Men	462	22	25
Women	1,538	79	75
Working	819	41	41
Nonworking	704	37	34
Type of Household			
With children	923	46	47
No children	1,058	53	53
Age			
18-24	136	8	6
25-39	753	35	40
40-49	399	21	19
50-64	391	20	19
65 and over	300	15	15
Income			
$15,000 or less	366	19	17
$15,001-$25,000	367	18	19
$25,001-$35,000	343	19	16
$35,001-$50,000	355	16	20
$50,001 or more	318	15	17
Marital Status			
Single separated divorced widowed	677	34	34
Married	1,369	67	66
Education			
High school or less	986	49	50
Some college college grad	1,003	50	50
Medically Restricted Diet			
Yes	373	16	21
No	1,609	83	78
Region			
East	361	18	18
Midwest	543	26	28
South	659	34	32
West	437	22	22

*East includes Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont and West Virginia

Midwest includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin

South includes Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas and Virginia

West includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming

Note: Percentages may add up to less than 100 percent as a result of nonresponse

Sampling Error

It is important to note that all survey results are subject to sampling error, i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 54 shows the range of error for samples of eight different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example illustrates this process.

As shown in Table 8 of this report, 39 percent of those surveyed this year spend $61 to $100 each week on groceries for their families. This percentage is based on the total sample of 2,000 shoppers. From Table 54, the sampling error associated with a 40 percent response for a sample of 2,000 is plus or minus 2.2 percentage points. If one applies this sampling error to the 39 percent response in Table 8, the true proportion of shoppers who spend $61 to $100 a week should be no less than 37 percent and no more than 41 percent.

Aside from knowing the sampling error of any given finding, one may also be interested in whether the differences among certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, Table 28 shows an eight-point difference between the percentage of shoppers from households with children who average one supermarket trip a week and those from childless households who do this. Although this eight-point difference seems large, it could be due to sampling error. To determine whether this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample sizes, the less likely a reported difference will be due to sampling error.

In Table 55, the minimum percentage difference that must occur to be considered real is shown for varying sample sizes and varying percent responses.

In the previous example from Table 28, 923 respondents who live in households with children were asked how many times they go to the supermarket in an average week, of whom 24 percent said once. A total of 1,058 households without children were asked the same question, and 32 percent average one trip. These sample sizes are closest to the 1,000 and 1,000 sample size row of the table. The two percentages are closest to the 30 percent or 70 percent column. From the table, the minimum difference between percentages that would not be due to sampling error is four points. Because the difference between 24 percent and 32 percent exceeds this minimum, one can safely assume that fewer shoppers in households with children than those without children shop only once per week.

TABLE 54

SAMPLING ERROR (+/-) AT 95 PERCENT CONFIDENCE LEVEL FOR SAMPLES OF NINE DIFFERENT SIZES

	Size of Sample								
Percentage Response	2,000	1,000	700	600	500	400	300	200	100
	%	%	%	%	%	%	%	%	%
10(90)	1.3	1.9	2.2	2.4	2.6	2.9	3.4	4.2	5.9
20(80)	1.8	2.5	3.0	3.2	3.5	3.9	4.5	5.5	7.8
30(70)	2.0	2.8	3.4	3.7	4.0	4.5	5.2	6.4	9.0
40(60)	2.2	3.0	3.6	3.9	4.3	4.8	5.5	6.8	9.6
50(50)	2.2	3.1	3.7	4.0	4.4	4.9	5.7	6.9	9.8

TABLE
55
SAMPLING ERROR OF DIFFERENCE BETWEEN PROPORTIONS

Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size of Two Groups Asked Question on Which Survey Results Are Based	Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
1,000 vs 1,000	3	4	4	4	4
500	3	4	5	5	5
300	4	5	6	6	6
200	5	6	7	7	8
100	6	8	9	10	10
500 vs 500	4	4	6	6	6
300	4	6	7	7	7
200	6	7	8	8	8
100	7	9	10	11	11
300 vs 300	5	6	7	8	8
200	5	7	8	9	9
100	7	9	10	11	11
200 vs 200	6	8	9	10	10
100	7	10	11	12	12
100 vs 100	8	11	13	14	14

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