U.S. Supermarket Experience Survey

2009

THE RETAIL SURVEY GROUP

Your Listening Partner™

About the Survey

RSG surveyed 1,409 U.S. grocery shoppers about their most recent supermarket visit. Surveys were completed via the Internet in July-August 2009 and participation was scaled by population in the four census regions.

Respondents were asked to rate their visit on various attributes relating to fresh food departments, variety/selection, cleanliness, checkout/service, and price/value. In general, mean rating increments of .05 or more are statistically significant.

We then asked about several other topics relating to the visit, including in-stock condition, checkout method, ad usage, and shopping bag type.

This report highlights the key survey findings.

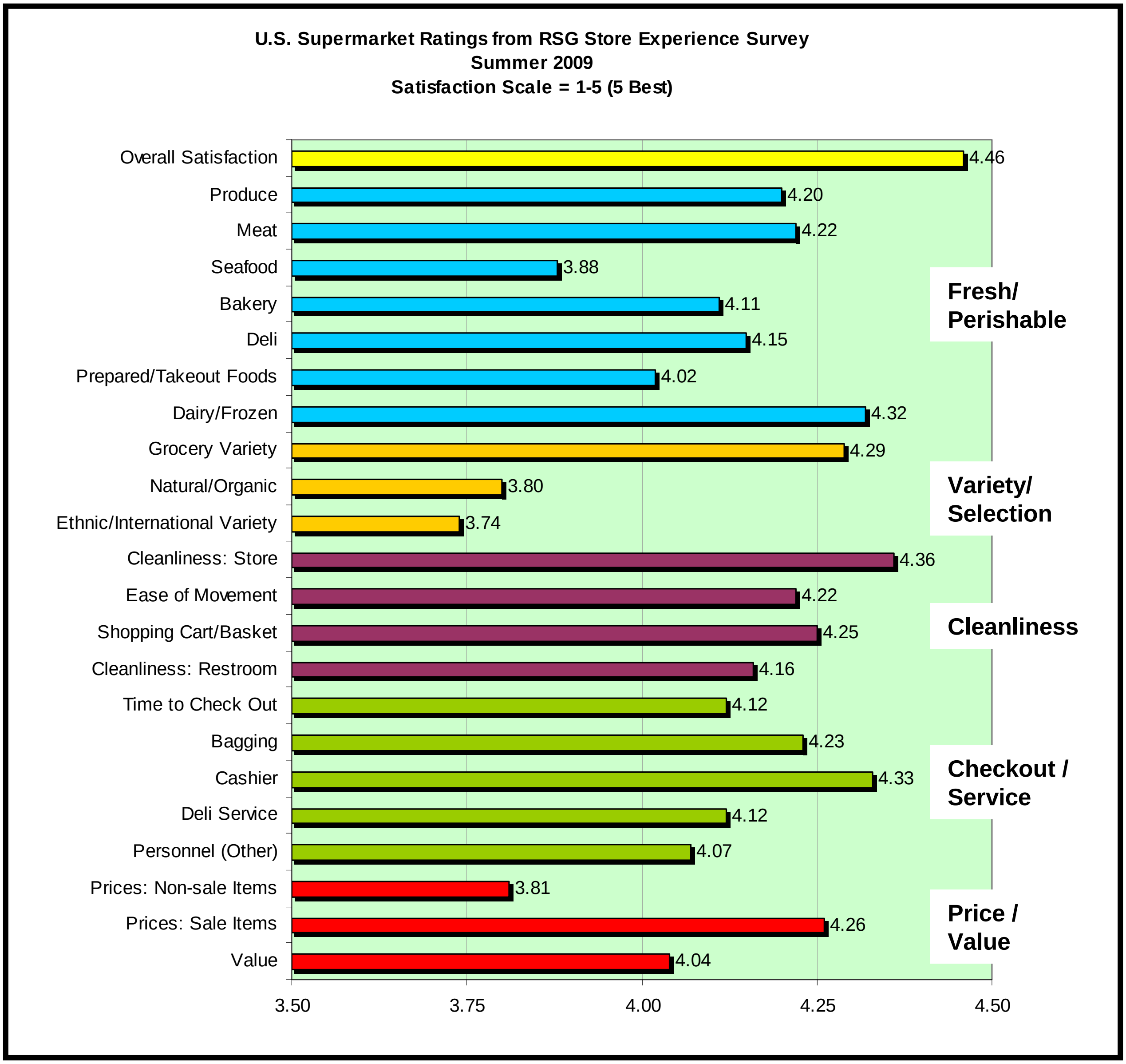
Findings **Page**

About RSG

The Retail Survey Group is a leading provider of customer and employee feedback systems to U.S. grocery retailers. For over 35 years, RSG has been helping supermarket companies listen to their key stakeholders and seek actionable feedback about the shopping and working experience.

For information about this survey or RSG, please contact Doug Madenberg, President, at (800) 600-6084 or dm@rsg.com.

Item Comparison:
Attributes of the Shopping Experience



Overall satisfaction with the visit (4.46) was higher than any single attribute. There was a wide disparity in satisfaction with the various aspects of the store visit.

Respondents were more satisfied with meat and produce than the other perimeter departments. Fresh seafood had an especially low rating. There is also a major opportunity in prepared/takeout foods.

The variety/selection of natural/organic and ethnic/international items were the lowest-rated survey attributes, even with the industry's recent merchandising focus in these areas.

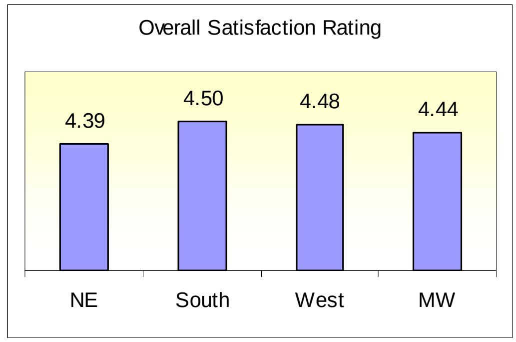
Cleanliness ratings were relatively high as a group, but restroom cleanliness was the lowest rated of these attributes.

Among the factors related to service and checkout, cashier friendliness/attitude had the highest rating. Satisfaction with service at the deli counter and elsewhere in the store was far lower.

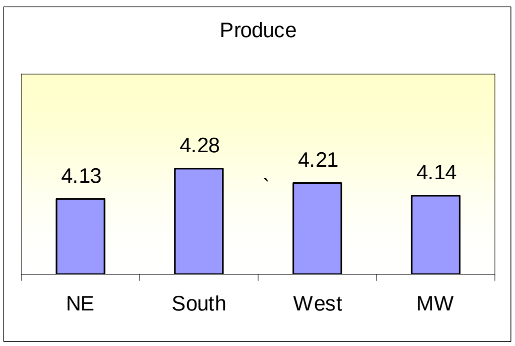
Finally, there was a clear distinction between ratings of regular and advertised sale prices. Satisfaction with overall value for the money was squarely between the two.

Region Comparisons

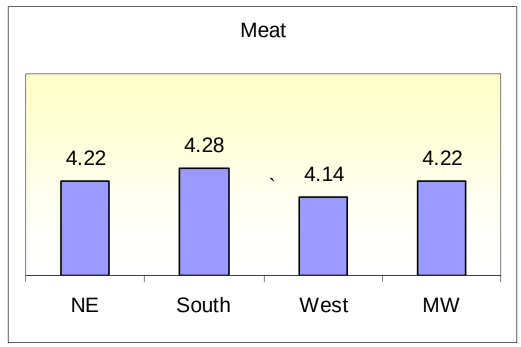
Respondents from the South region rated their visit the highest overall and across most attributes. The following figures illustrate experience factors with noteworthy variation across regions. Supermarkets in the Northeast received relatively low ratings for produce and cleanliness but higher marks for natural/organic variety and value for the money. West region shoppers gave relatively low ratings for meat and checkout speed. Stores in the Midwest had low ratings for produce and natural/organic variety.



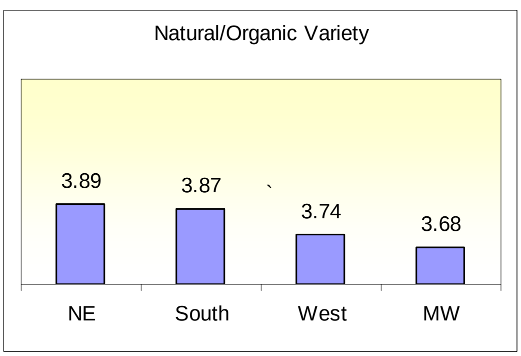
Overall Satisfaction Rating



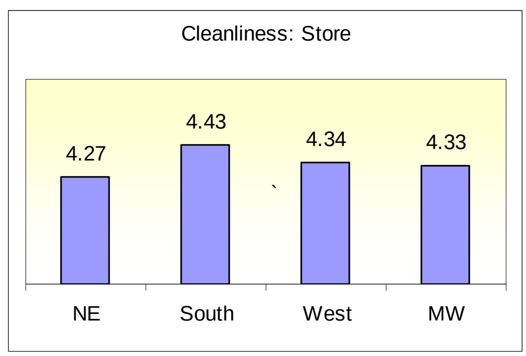
Produce



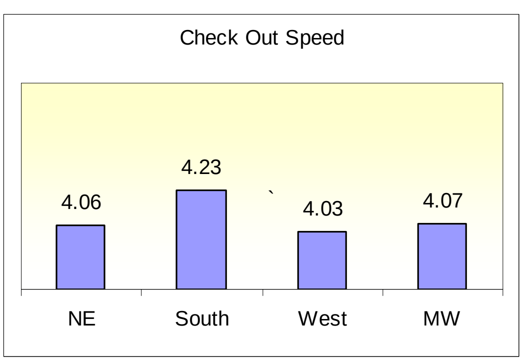
Meat



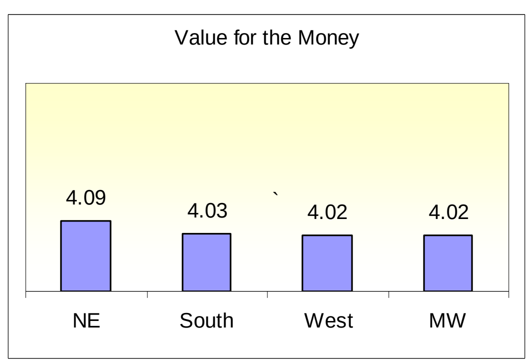
Natural/Organic Variety



Cleanliness: Store

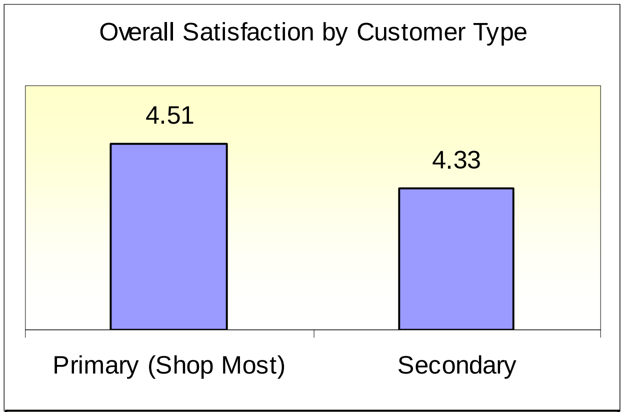


Check Out Speed

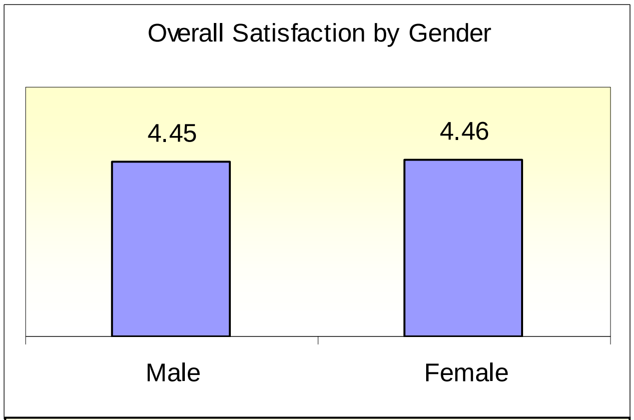


Value for the Money

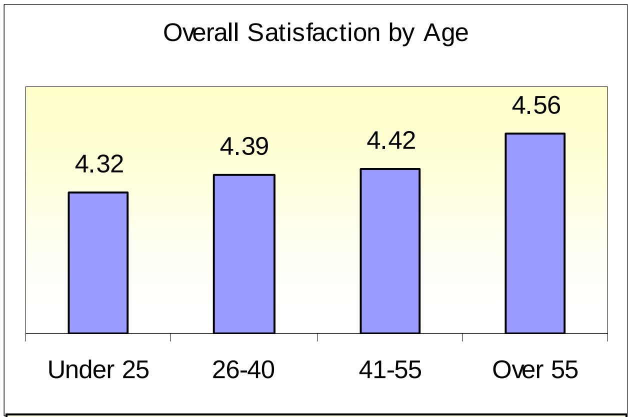
Demographic Comparisons



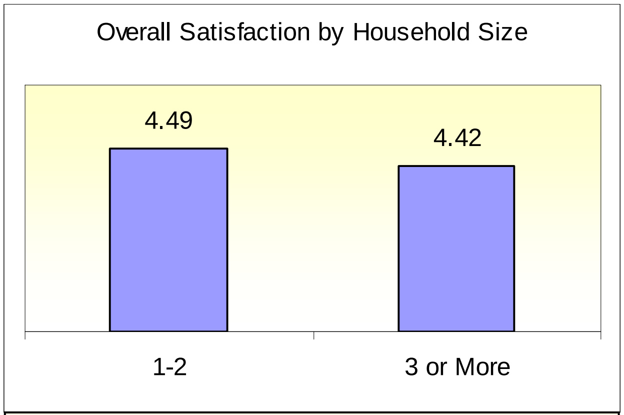
Primary customers (those who shop at the store most often) were significantly more satisfied overall than secondary shoppers.



Male and female shoppers were about equally satisfied with their overall visit.

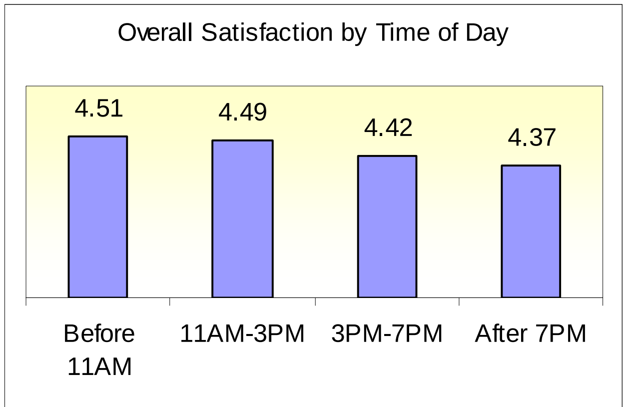


Older customers (over 55) were by far the most satisfied, while the youngest shoppers (under 25) were the least.

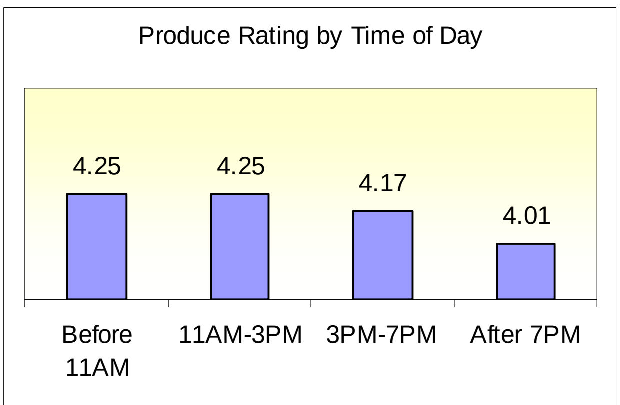


Respondents from small households with (1-2 people) were more satisfied than those with larger households.

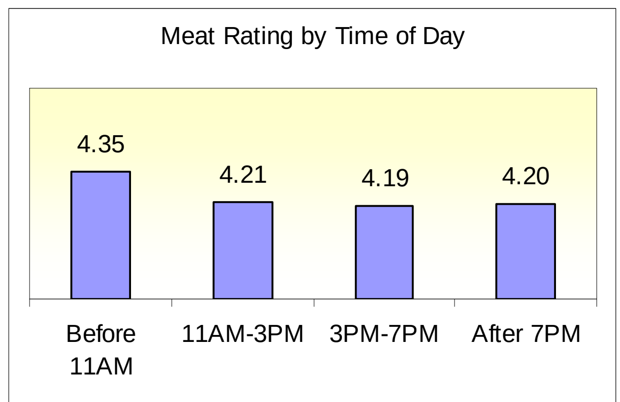
Time of Day Comparisons



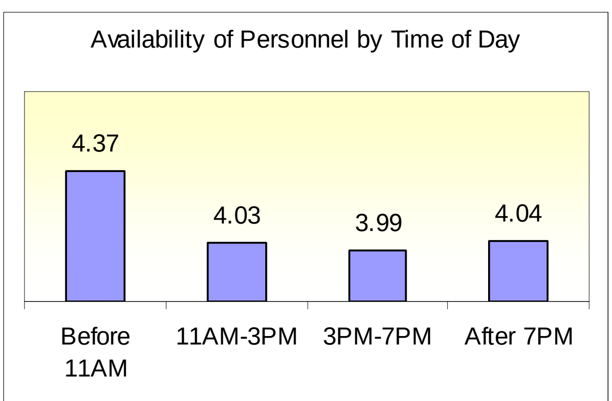
Customer satisfaction (overall and across most attributes) deteriorated later in the day.



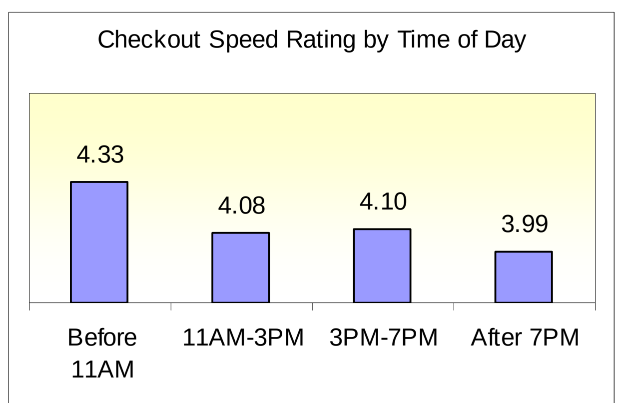
Produce ratings fell sharply after 7PM.



Meat ratings fell after 11AM and then remained steady

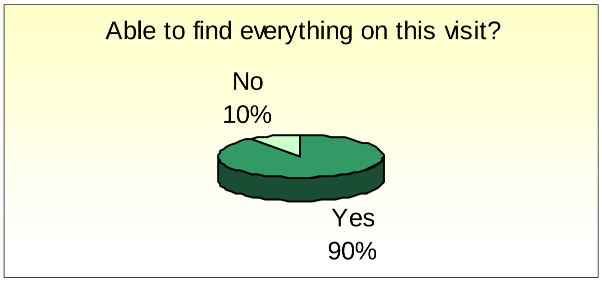


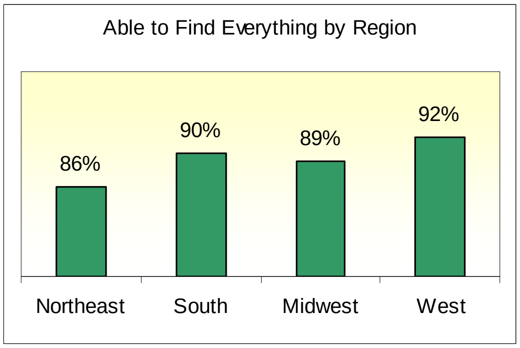
Personnel availability had the largest decline after 11AM among all survey items. Satisfaction was lowest during the afternoon/evening rush.

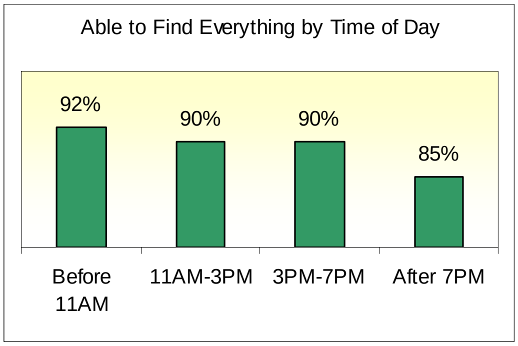


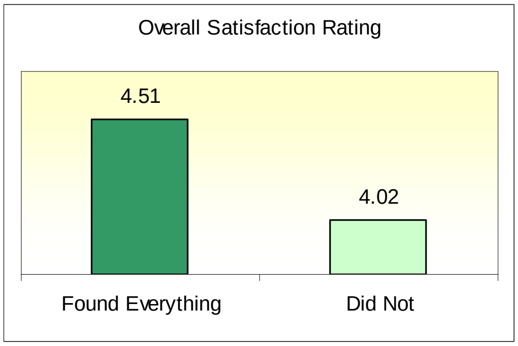
Satisfaction with checkout speed fell after 11AM and then again after 7PM.

In-Stock Condition: Performance and Importance









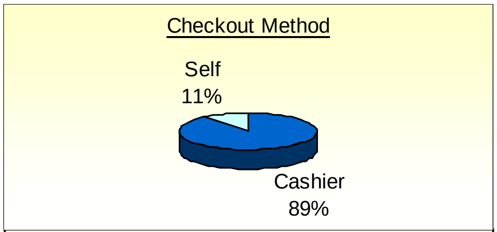
Respondents were asked if they were able to find everything they came in to purchase. Results were generally favorable, with over 90% finding all the items they wanted.

Shoppers in the West were the most likely to find everything on their visit. Those in the Northeast were the least likely.

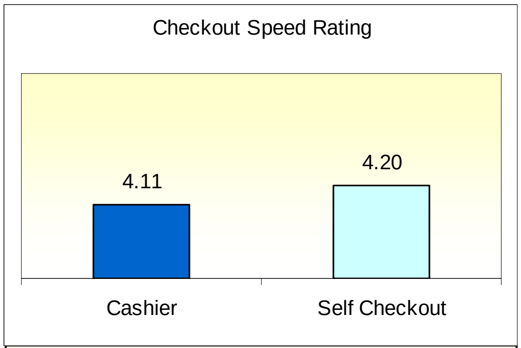
Respondents were slightly more likely to find everything early in the day (before 11AM) and somewhat less likely after 7PM.

This single factor had a major impact on a customer's overall satisfaction with the visit. Among those who found everything, overall visit satisfaction was 4.51. But this dropped to 4.02 among those who did not.

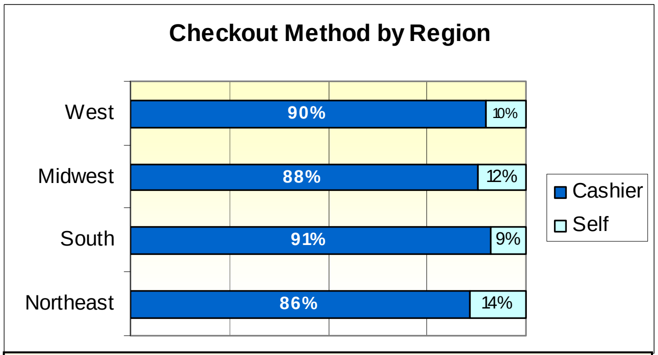
Cashier vs. Self Checkout



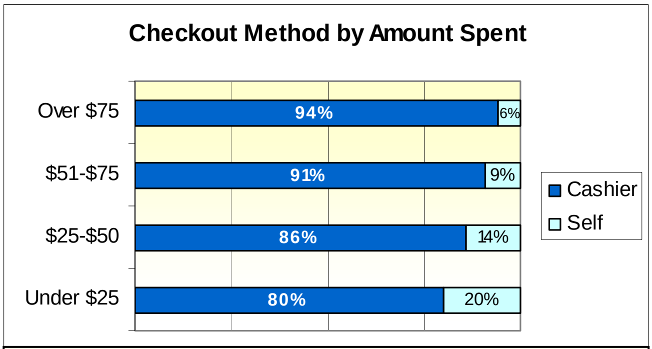
Self checkout represented about one in ten supermarket transactions in the sample.



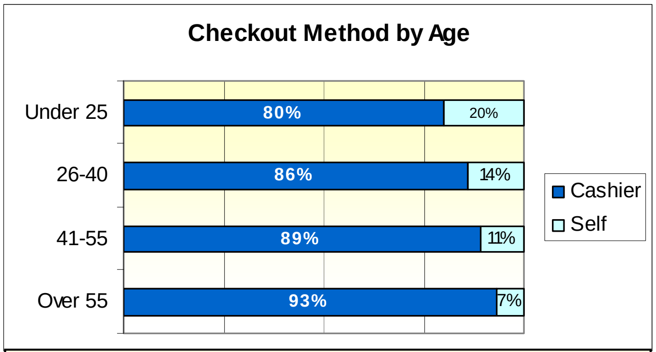
Respondents using self checkout were more satisfied with checkout speed than those using a cashier lane.



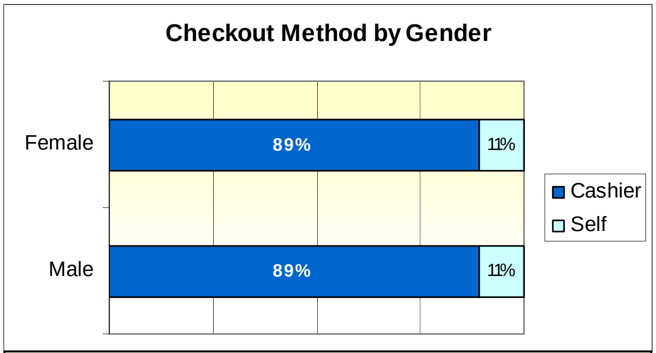
The Northeast region had the highest proportion of self checkout transactions. Respondents in the South region made the least use of this technology.



Self checkout was much more common for smaller transactions. Respondents with larger orders were more inclined to use a cashier lane.

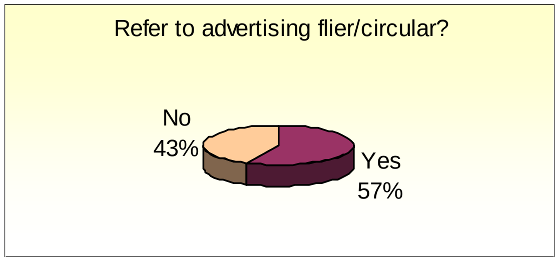


Use of self checkout technology was more common among younger respondents. Those under age 25 were twice as likely to use self checkout than those over age 40.

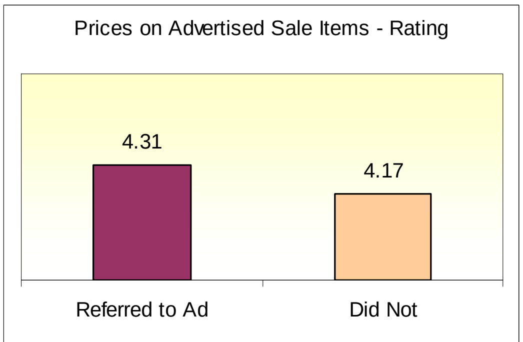


There was no difference in self checkout usage between men and women.

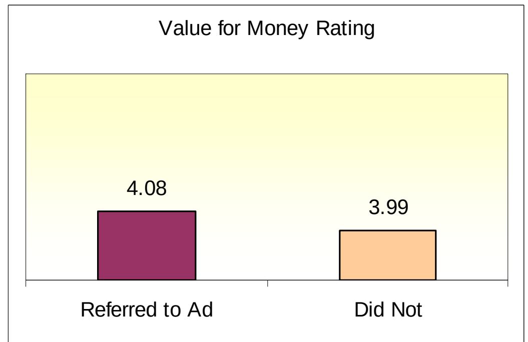
Ad Flier/Circular: Usage and Impact



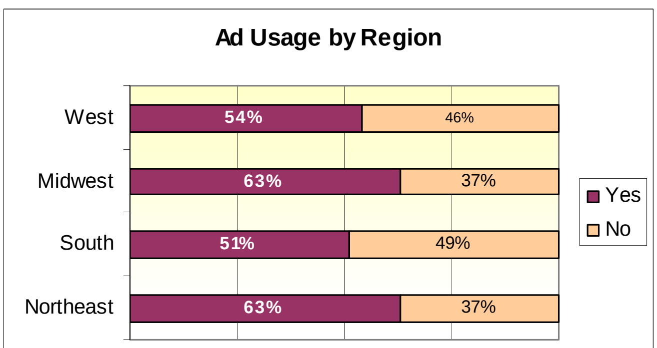
Over half (57%) of respondents referred to the store's advertising flier, either before or during the visit.



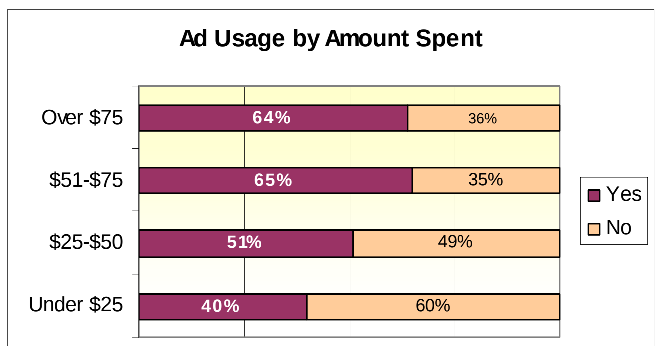
Those who referred to the ad were more satisfied with sale prices.



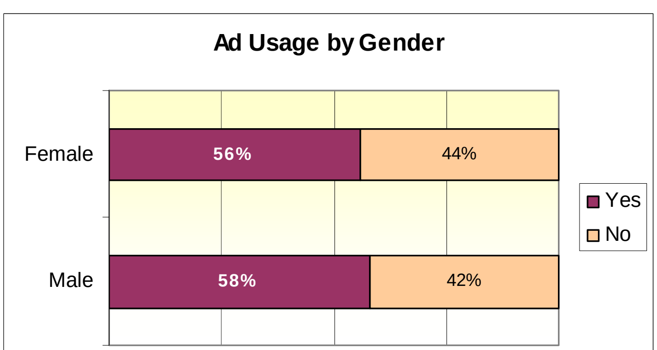
Ad usage was also associated with higher ratings of overall value for the money.



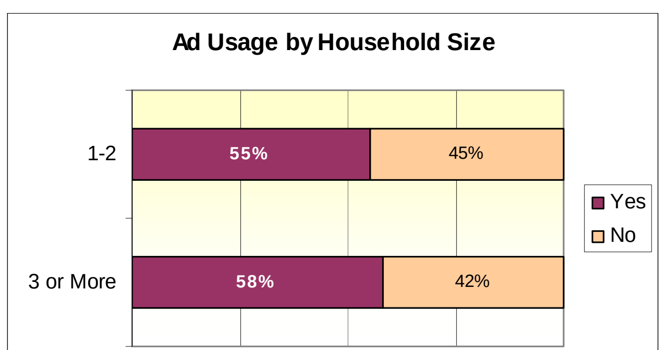
More respondents in the Midwest and Northeast referred to the ad flier than in the West and South regions.



Ad usage was higher (nearly two-thirds) for orders over $50. Only 40% of respondents spending less than $25 referred to the ad.

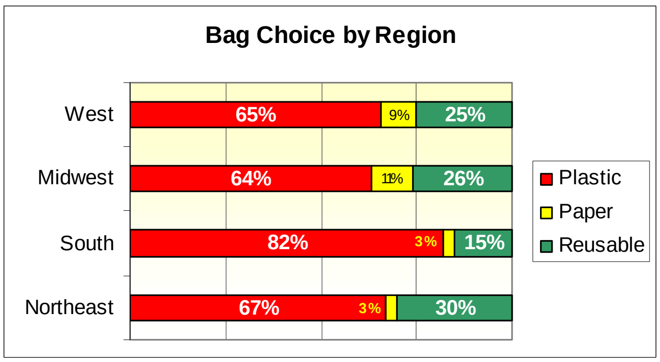


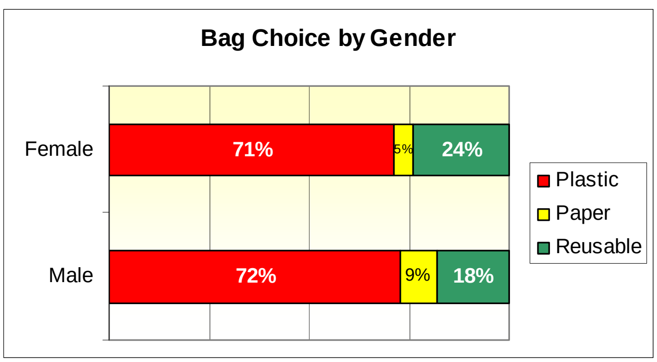
There was no significant difference in ad usage between male and female respondents.

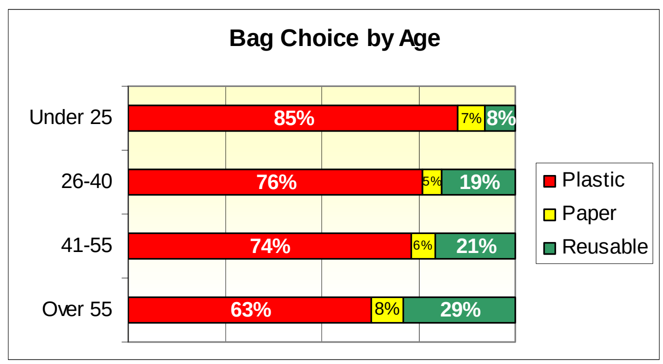


Ad usage was also about equal in smaller and larger households.

Choice of Shopping Bags







Plastic bags were the predominant choice among this sample of supermarket shoppers.

Respondents in the South region made the most use of plastic bags, by a wide margin. Those in the Northeast had the highest usage of reusable bags (brought to the store). Paper bag usage was more prevalent in the Midwest and West than in the other regions.

Women made greater use of reusable shopping bags than did men.

Respondents over age 55 made the most use of reusable bags (29%). Only 8% of those under age 25 used reusable bags.