

FIELD AGENT<sup>®</sup> PRESENTS

GROCERY SHOPPING WITH

GEN



INSIGHTS ON THE  
NEXT GENERATION

Spring 2019

# INZIGHTS: GEN Z ON GROCERY SHOPPING

At the beginning of each year, thought-leaders try to identify the consumer trends they believe will define the coming year(s). In 2018 and 2019, a chorus of individuals and organizations began nudging businesses to make ready for **Generation Z** as an emerging and potentially powerful consumer force.

Given this budding preoccupation with Gen Z, i.e., individuals born from 1997 to 2012, now is the time to start considering the attitudes and behaviors of this “next generation” from an angle with potentially enormous implications for thousands of brands and retailers:

**How does Gen Z shop for groceries?  
How *will* Gen Z shop for groceries?**

And although only a narrow swath of Gen Z has already reached adult age, presently 18-22 year olds, it's not too soon to begin exploring their perspectives on a range of grocery topics—looking for indications, if they exist, of how Gen Z may differ from previous generations, and laying down baselines to serve future research inquiries into Gen Z and their grocery-shopping activities and preferences.

In this report, Field Agent showcases the results of a mobile survey of 775 18-22 year olds—our Gen Z sample. For comparison purposes we also surveyed 1,303 40-60 year olds who represent, roughly, the age of Gen Z's parents.

**We believe you'll find this report full of enlightening insights into grocery shoppers of all ages. So turn the page...and start becoming acquainted with the next generation of grocery shoppers.**





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# Meet Our Gen Z Sample

N = 775 18-22 year olds

19%

Live with spouse or "significant other"

38%

Still live with one or more parents/guardians

8%

Are parent/guardian to one or more children

11%

Shop for one or more children

35%

Shop for a pet

78%

Cook Meals

(vs 95% among 40-60 year olds)

34%

Have own Amazon Prime account

(vs 51% among 40-60 year olds)

26%

Use someone else's Prime account

(vs 17% among 40-60 year olds)

26%

Own a smart speaker

(vs 32% among 40-60 year olds)

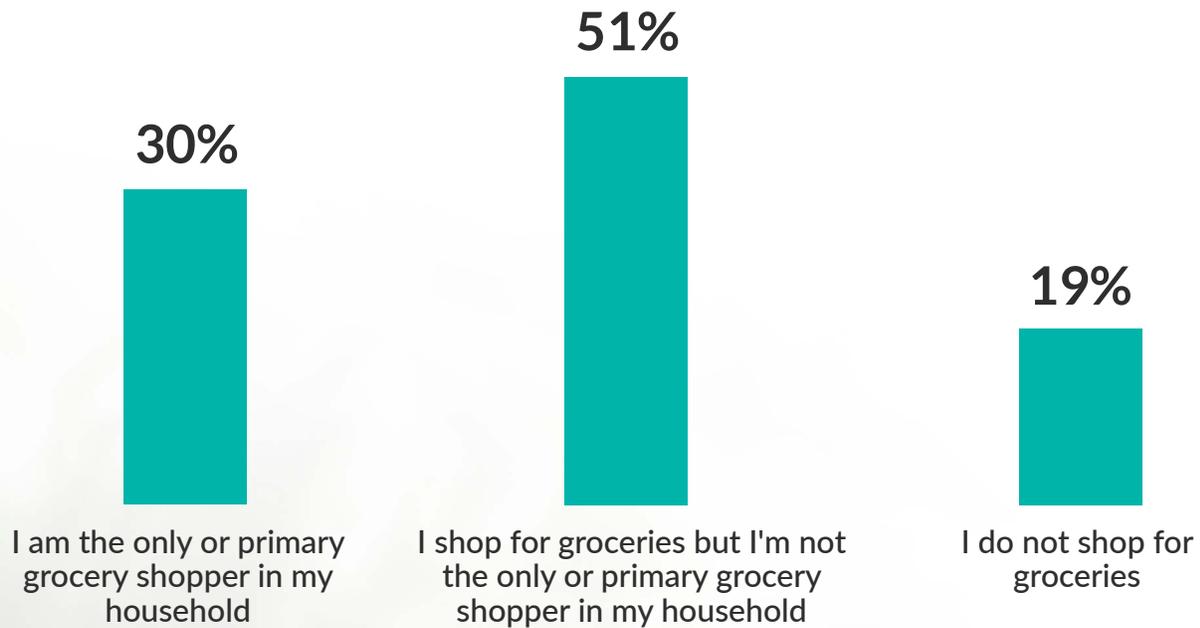
9%

Make purchases of merchandise through smart speaker

(vs 13% among 40-60 year olds)



# Who does the grocery shopping in your household?



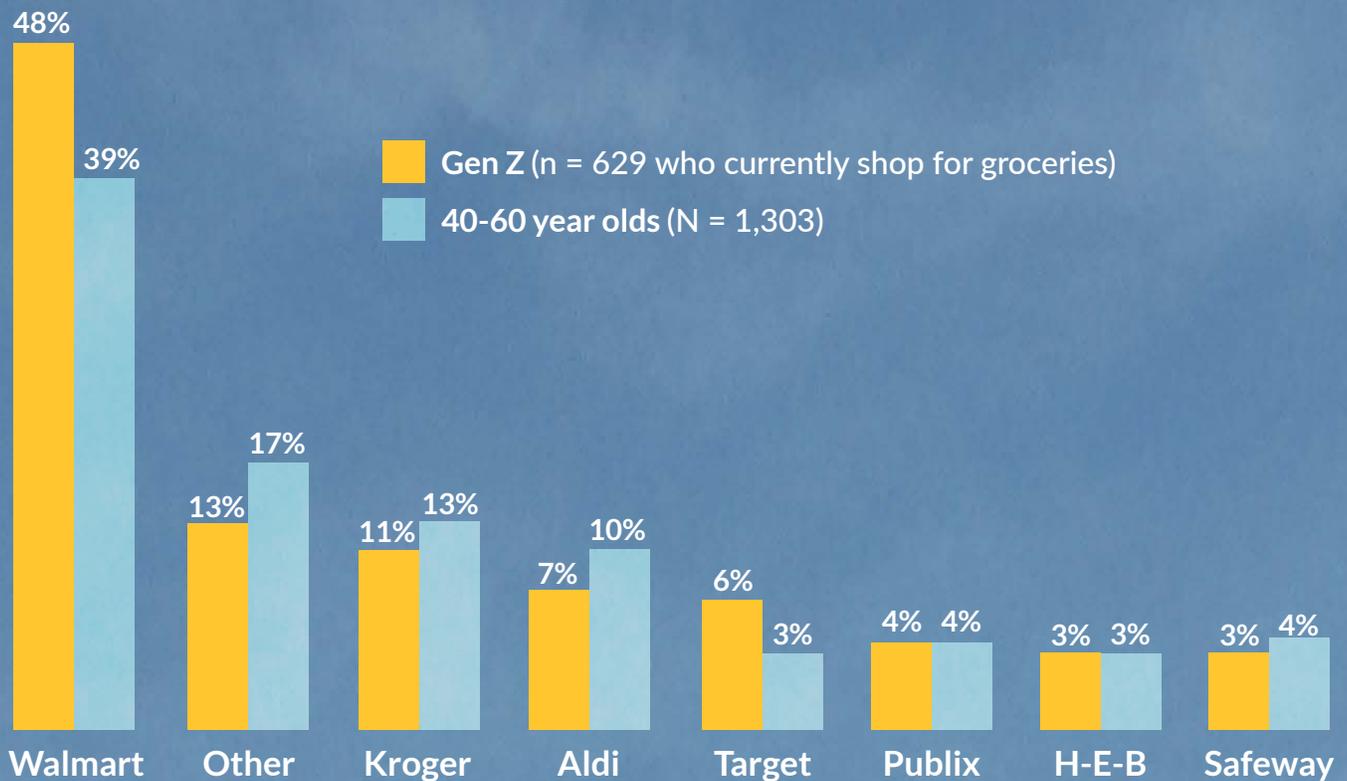
N = 775 Gen Zers

## InZight:

They may only be 18-22 at present, but 3-in-10 Gen Zers said they're already holding down the grocery-shopping responsibilities completely or largely by themselves.



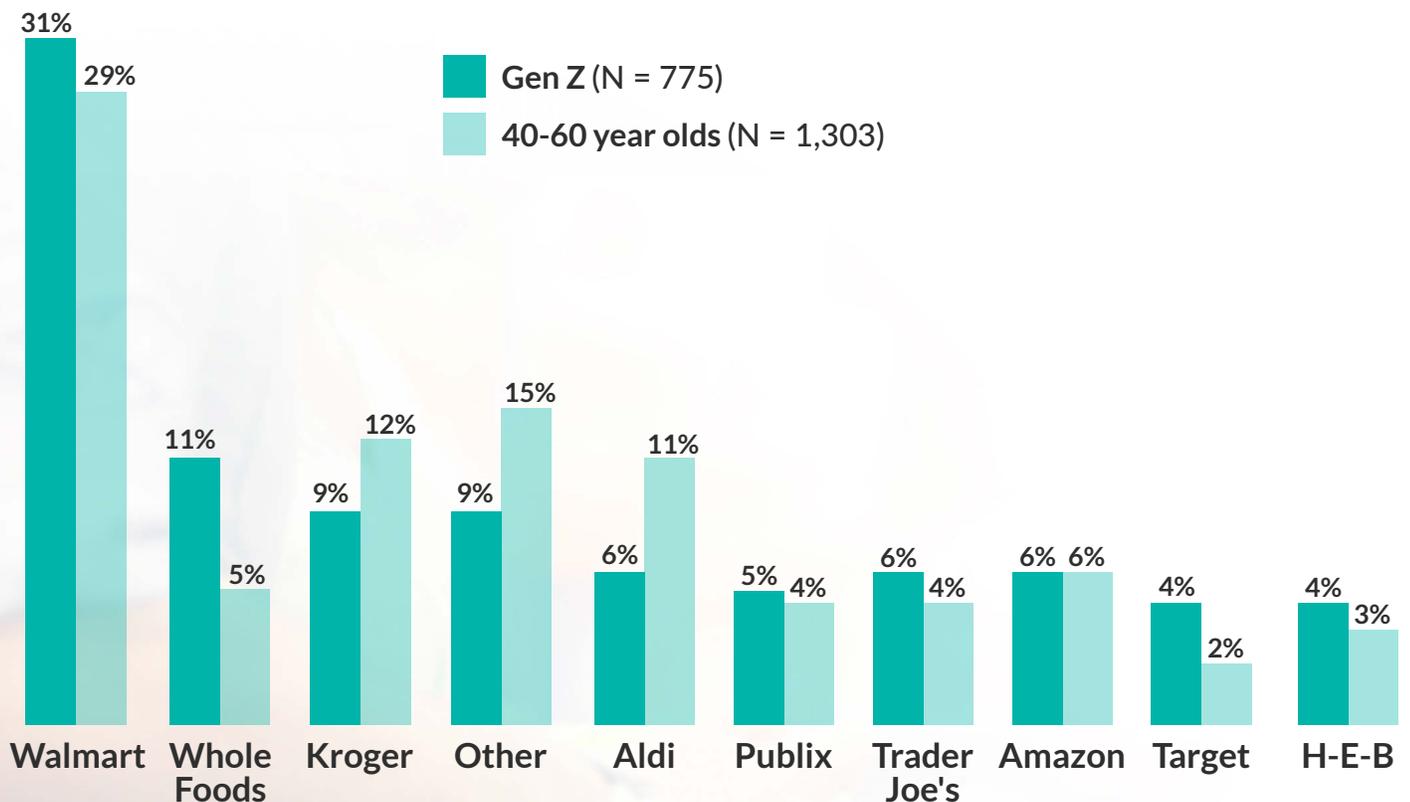
# Where do you currently shop for groceries the most?



## Gen Z Speaks:

“I am a college student. I am broke. I hope to be able to buy more...and healthier groceries within the next 5-10 years. Probably still shopping at Walmart for the best deals.”

# Where do you expect to be shopping for groceries the most in 5-10 years?

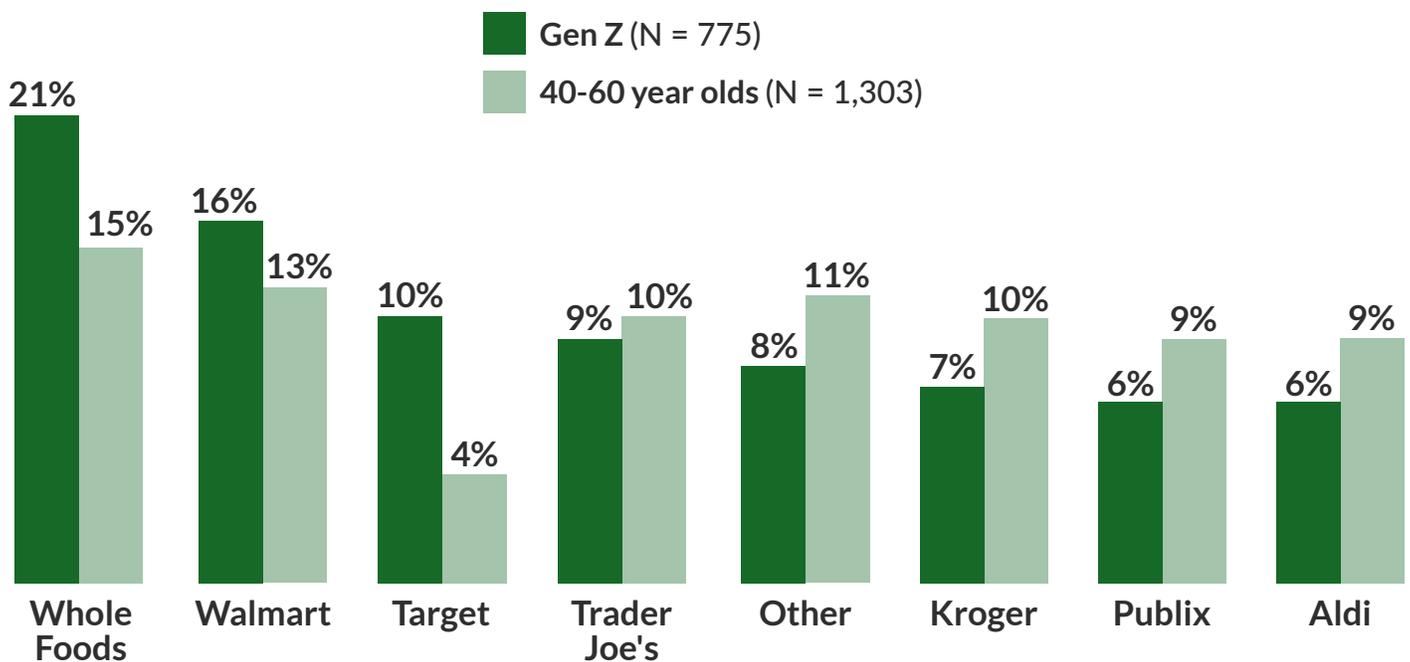


## Gen Z Speaks:

“I'll probably go to the store fewer times a week (in 5-10 years), and try to get as much variety as I can as quickly and cheaply as I can.”



## Of which grocery retailer do you have the most favorable opinion?



### Gen Z Speaks:

“Of the stores listed, the only ones I have near me are Walmart and Aldi. In my perfect world I'll go on a vacation and go to a Trader Joe's.”



## InZights on Grocery Retailers

As shown, we asked both samples three questions about their grocery-shopping behavior:

1. Where do you currently shop the most for groceries? (Posed only to qualified respondents)
2. Where do you expect to be shopping the most for groceries in the next 5-10 years?
3. Of which grocery retailer do you have the most favorable opinion? This, we explained to respondents, is the grocery retailer you most admire and would prefer to shop “in a perfect world.”

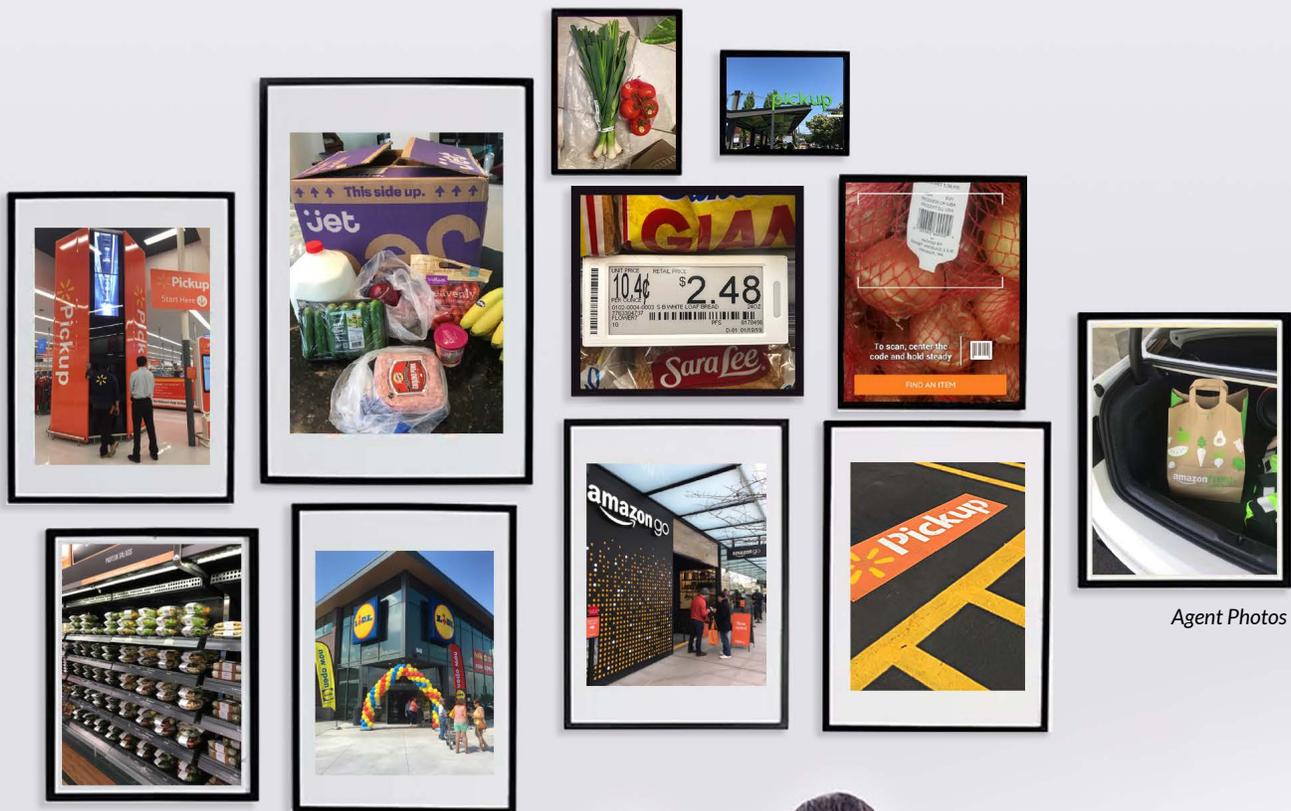
Walmart fared best on both the “current” and “5-10 year” questions. **In our surveys, more Gen Zers (48%) said they’re currently shopping at Walmart than 40-60 year olds (39%), likely owing to the former’s income uncertainty.** But even when 18-22 year olds look down the road 5-10 years, presumably when their income picture has improved, 31% still expect to be shopping at Walmart (more than any other retailer).

When the question becomes one of favorability, however, Whole Foods tops the list among both Gen Zers (21%) and their “parents” (15%), while Trader Joe’s storms into the rankings (among Gen Zers) behind only Walmart and Target.

# We've Got the Future of Grocery Retail In Our Sights

Field Agent crowdsources over one million smartphones across the United States to offer fast, affordable **retail-auditing, mystery shopping, market research, and shopper-influence services.**

From store aisles to pickup stations, mobile apps to home deliveries, our agents are spread across the country to show-and-tell you exactly what matters.

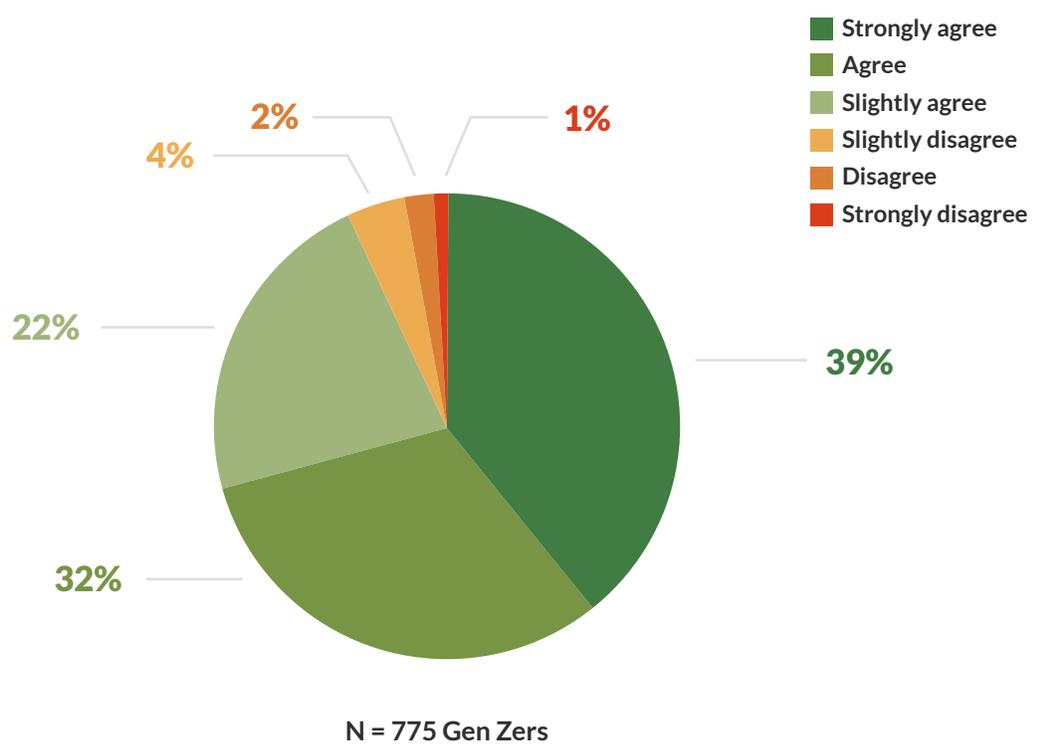


Agent Photos





To what extent do you agree with this statement:  
“My generation will shop for groceries differently than  
my parents’ generation”?



### InZight:

Regardless of what the future holds, Gen Z certainly expects to shop for groceries differently than their parents. The next page may offer additional insight into this perspective.





# Gen Z Speaks: How We Think Our Grocery Shopping Will Change in 5-10 years

We posed a free-form question to our sample of 775 Gen Zers, asking them to tell us how their grocery shopping will change over the next 5-10 years. Below we present the most prominent themes, along with representative quotes.



## Eating Healthier

(e.g., more natural ingredients)

"I hope to be eating more fresh foods. Right now I am on such a time crunch all the time that I eat more convenience meals."



## Faster, Easier In-Store Shopping

"It will be easier and faster to get groceries because of the scan and go machines instead of waiting in line."



## Cooking More, "Fresher"

"I think that I'll buy more 'adult' foods. Right now, about 90% of my groceries consist of frozen meals. I think in 5-10 years I'll be buying actual whole meals that I can prepare."

## Using Grocery Pickup

"I will probably shop online more and do pickup at the store if those types of services get better and more reliable."



## Shopping for More People

(e.g., starting a family)

"I will be married and have a child so I would be shopping for more people in my household."



## Using Grocery Delivery

"I think I will do grocery shopping online in the future and have it delivered."



## Saving Money

(e.g., using coupons more frequently)

"In 5 to 10 years I would like to see myself probably become more of a coupon-friendly shopper. I always shop with a budget in mind."



## Becoming the Primary Shopper

(and/or buying what I want)

"I think that I will become the primary grocery shopper as I will likely move out on my own."

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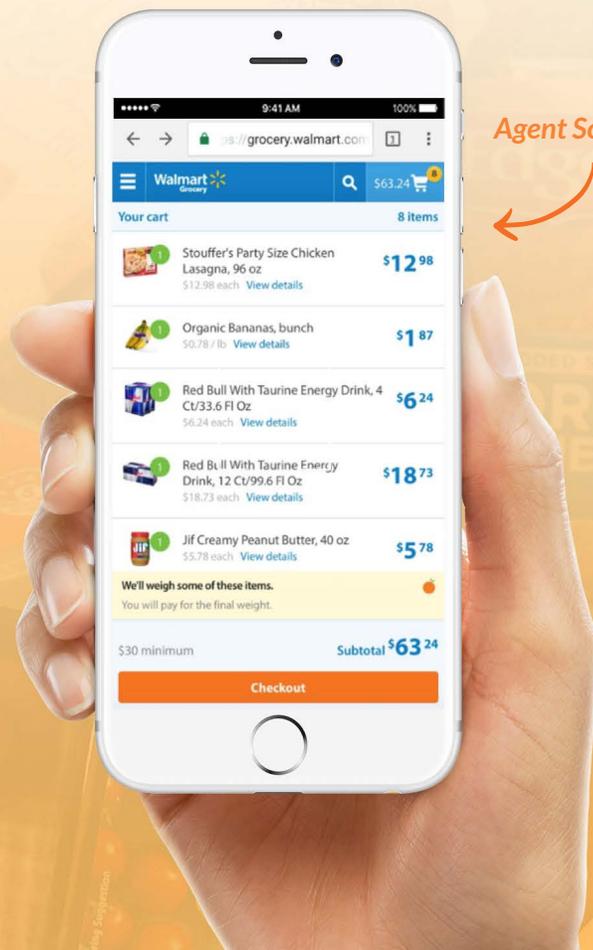
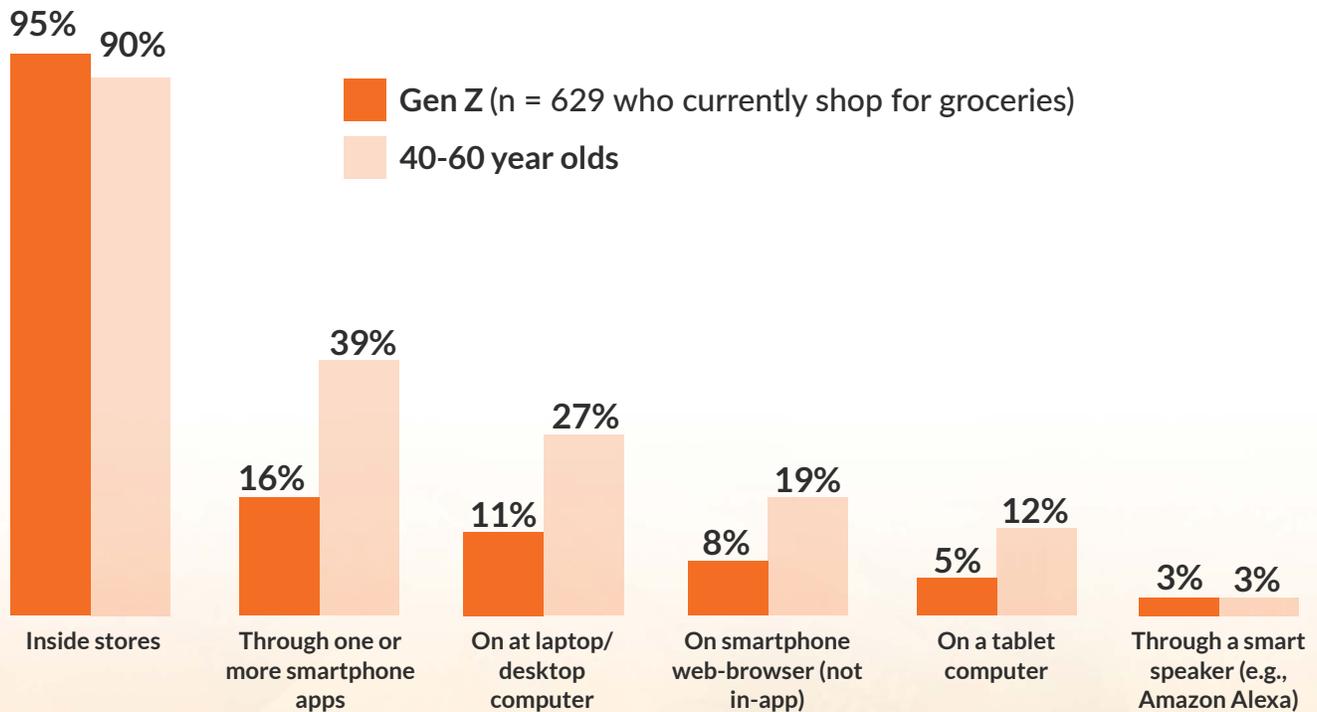
We keep *Endcaps & Insights* humming with insights, photos, and video about the latest developments in grocery retail.

Click below for a tasty sample of grocery-retail features

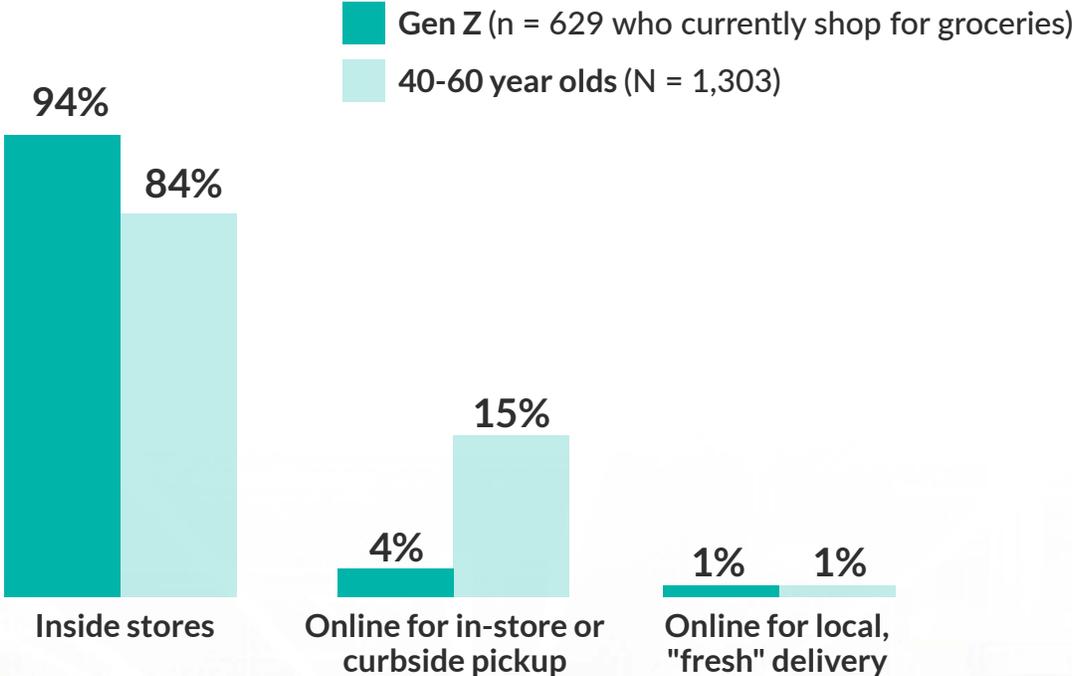
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# Identify all the ways you presently purchase groceries



# How do you currently shop for, purchase, and acquire most of your groceries?

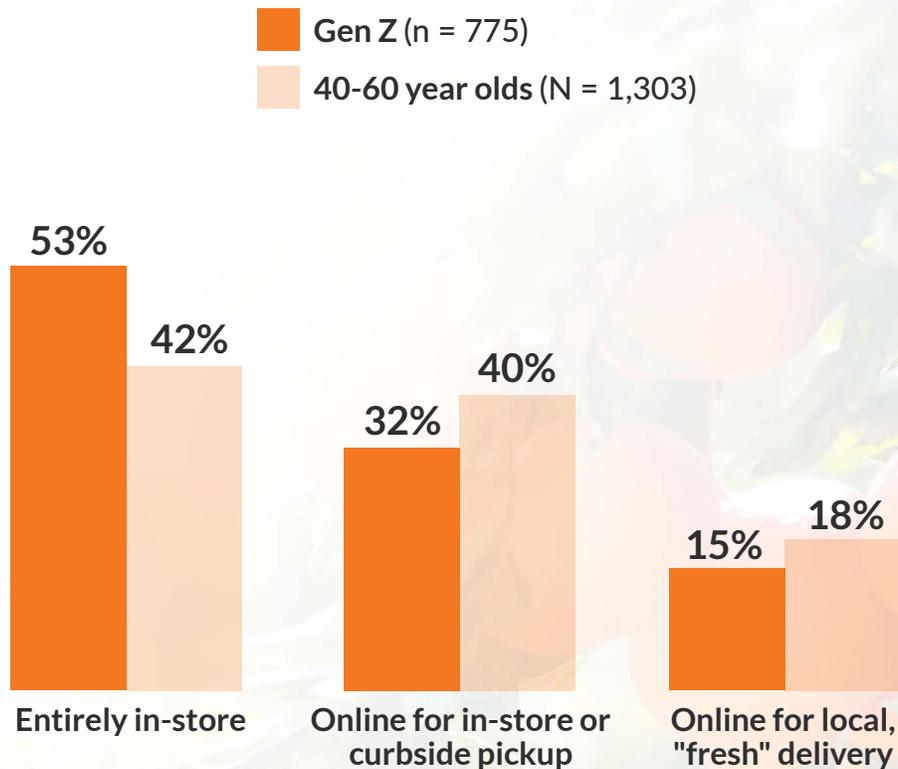


## Gen Z Speaks:

“Currently we go to the store several times a week and just get what we need at that moment instead of planning ahead and stocking up like in most households that I have experienced.”



# How do you expect to shop for, purchase, and acquire most of your groceries 5-10 years from now?



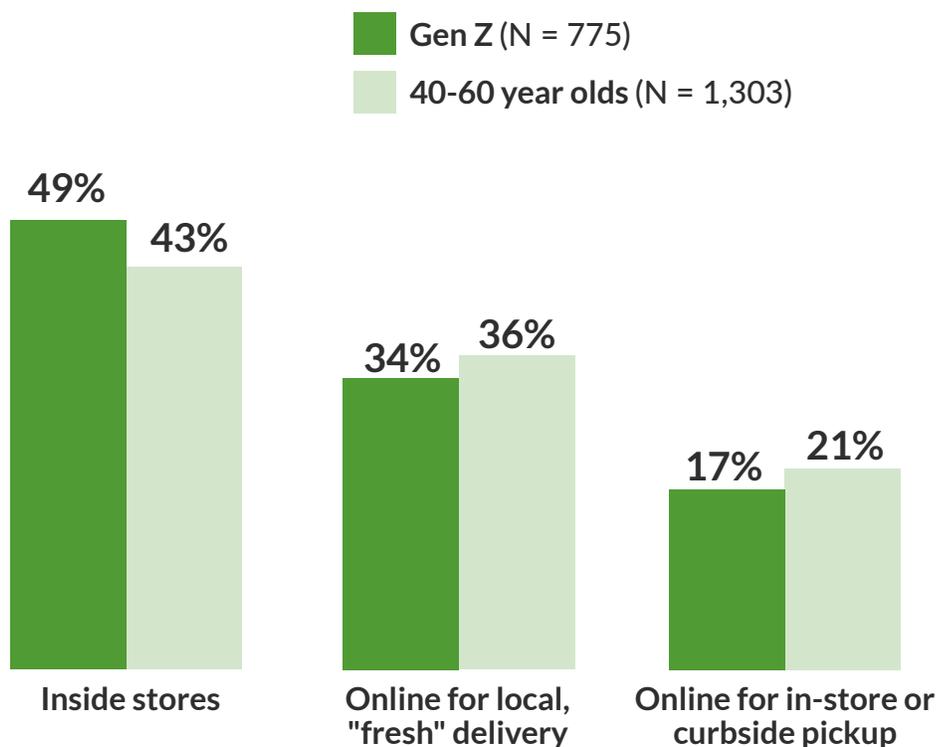
## Gen Z Speaks:

**“In 5-10 years I may be shopping online and getting it shipped to me instead of going to the grocery store.”**





## How would you shop for, purchase, and acquire groceries “in a perfect world”?



### Gen Z Speaks:

“I’m sure online ordering will continue to grow and become the primary way of shopping.”

# InZights on Grocery-Shopping Methods

Gen Zers are fairly confident they won't shop for groceries like their parents. As our qualitative analysis suggests, many in Gen Z expect technology—BOPIS, delivery, scan-and-go, etc.—to greatly enhance their grocery-shopping experiences in the coming years.

For the time being, however, Gen Z may actually be less innovative in their grocery-shopping methods than even their parents, most probably a function of the living arrangements, income levels, and lifestyles associated with being 18-22 years old.

For instance, whereas 39% of 40-60 year olds reported purchasing groceries via a smartphone app, only 16% of Gen Z grocery shoppers surveyed can currently say the same. Likewise, 15% of our 40-60 year old sample claim they presently buy most of their groceries online for store pickup, compared to only 4% of Gen Zers.

But as the digital denizens of Gen Z become more prosperous and stable, expect them to start using services like grocery pickup and fresh delivery, as suggested by their qualitative remarks. As one 22-year-old young man said,

**"I will most likely order everything online [within 5-10 years]."**



# Digital Grocery Through the Eyes of Shoppers

Click below to explore video of some of today's most advanced retail developments



# From 1-5, where 1 is most important, rank what matters most when grocery shopping

Gen Z (n = 629 who currently shop for groceries)

	Price	Nutrition/Diet	Convenience	Brand	Social/Environmental Impact
#1	58%	20%	13%	7%	3%
#2	26%	24%	34%	10%	6%
#3	10%	30%	25%	23%	13%
#4	3%	18%	21%	30%	27%
#5	3%	8%	8%	29%	51%

40-60 year olds (N = 1,303)

	Price	Nutrition/Diet	Convenience	Brand	Social/Environmental Impact
#1	52%	26%	14%	7%	2%
#2	31%	22%	29%	14%	4%
#3	11%	25%	29%	24%	11%
#4	4%	22%	19%	35%	19%
#5	2%	5%	9%	21%	63%

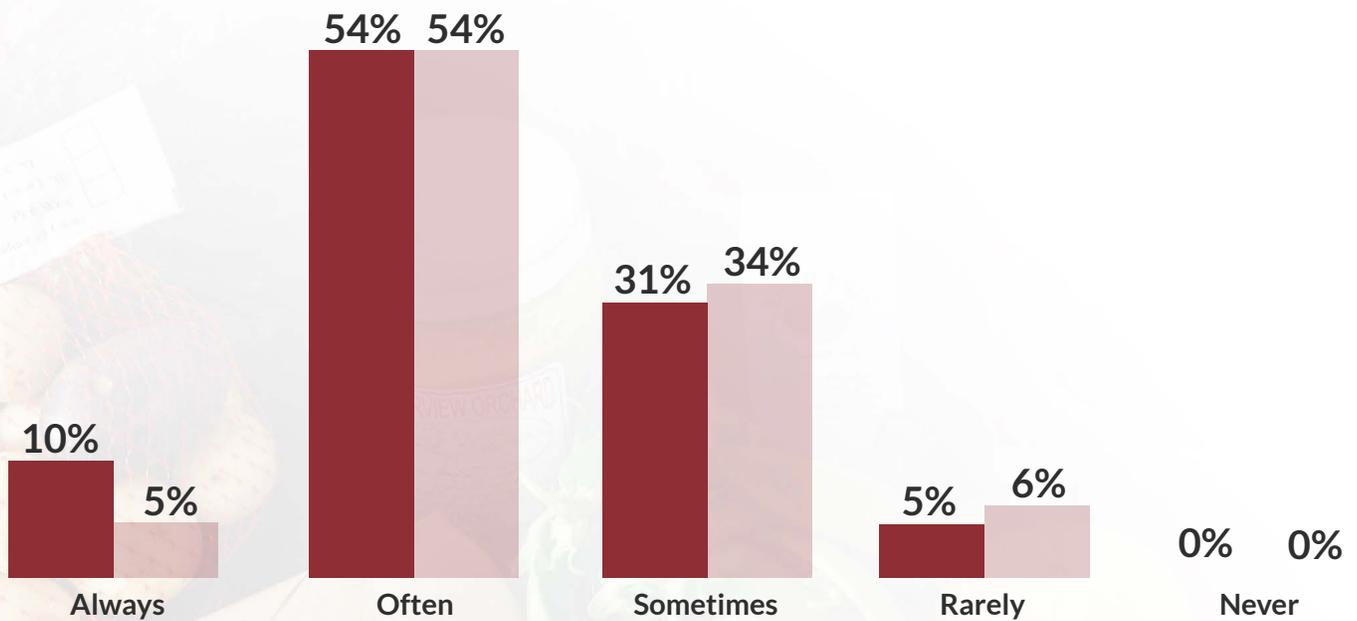
## InZight:

The similarities, not the differences, are most striking here. For all the talk of how Gen Z will be relatively more prone to shopping their values and less prone to brand loyalty, such differences aren't meaningfully reflected in the results of this survey. Instead, we see social/environmental impact languishing in last place among Gen Z's grocery-shopping priorities, while brand loyalty seems about equally unimportant among their "parents."



# When shopping for groceries, how often do you purchase store brand (i.e., generic) products?

■ Gen Z (n = 629 who currently shop for groceries)  
■ 40-60 year olds (N = 1,303)



## InZight:

Given their life stage and income uncertainty, Gen Z may be more price-sensitive than 40-60 year olds. Yet, once again, it's the similarities that are most resounding here.



# Splurge or Skimp?

Field Agent presented both samples the same selection of 12 popular grocery categories, from eggs to seasonings. We asked respondents to identify the three categories they'd be most likely to splurge on (i.e., because quality is relatively more important) and which three categories they'd be most likely to skimp on (i.e., because quality is relatively less important). Below we display the top splurges and skimps for both groups.

Gen Z (n = 629 who currently shop for groceries)

40-60 year olds (N = 1,303)

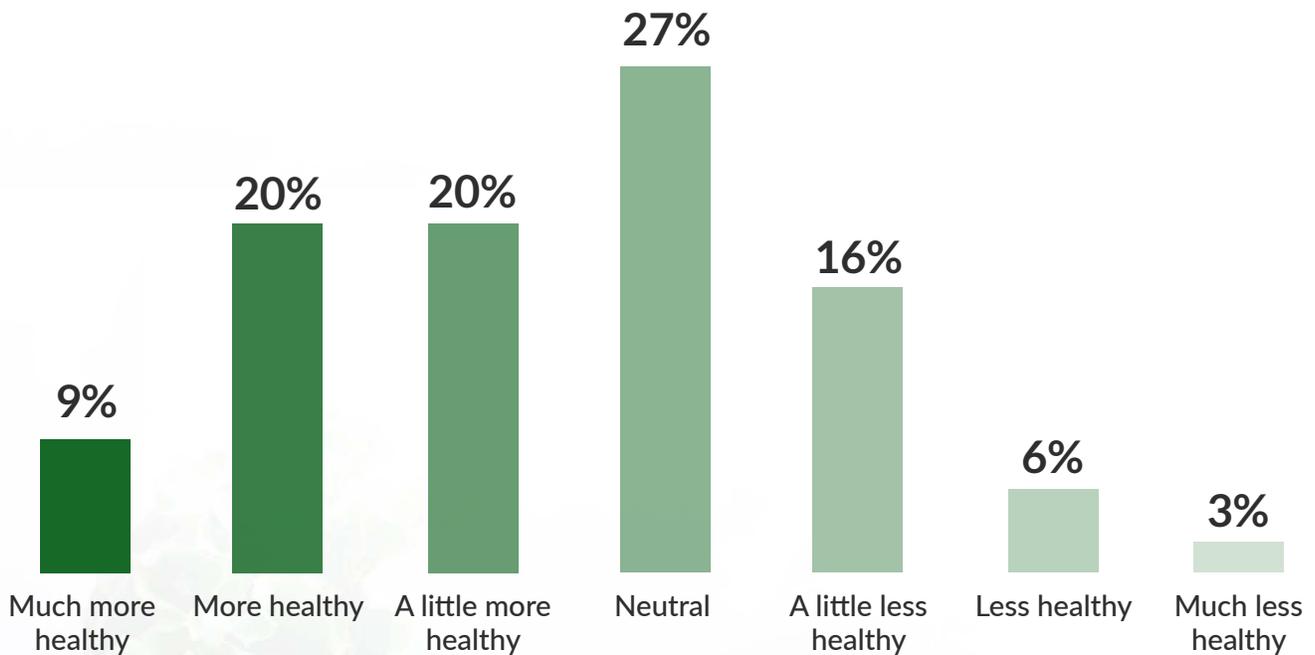
Gen Z (n = 629)		40-60 year olds (N = 1,303)	
Top Splurges	Top Skimps	Top Splurges	Top Skimps
Meat (57%)	Chips/salty snacks (37%)	Meat (66%)	Chips/salty snacks (39%)
Chips/salty snacks (32%)	Breakfast cereals (35%)	Vegetables (38%)	Seasonings (34%)
Vegetables (31%)	Frozen meals (30%)	Coffee (32%)	Breakfast cereal (32%)
Coffee (25%)	Bread (30%)	Cheese (31%)	Bread (30%)
Breakfast cereal (25%)	Eggs (28%)	Bread (20%)	Milk (27%)

## InZight:

Gen Z and their “parents” agree: meat, veggies, and coffee are no place to skimp. Quality is too important. But Gen Zers in our survey were more likely to splurge on salty snacks than older respondents, and older respondents were more likely to pay a premium on cheese. It’s all about priorities.



# Compared to your parents/guardians, do you think you eat more or less healthy?



N = 775 Gen Zers

## Gen Z Speaks:

**“Everyone is trying to be a little more healthy nowadays. When I was a child, my parents didn't care much and just bought junk food.”**

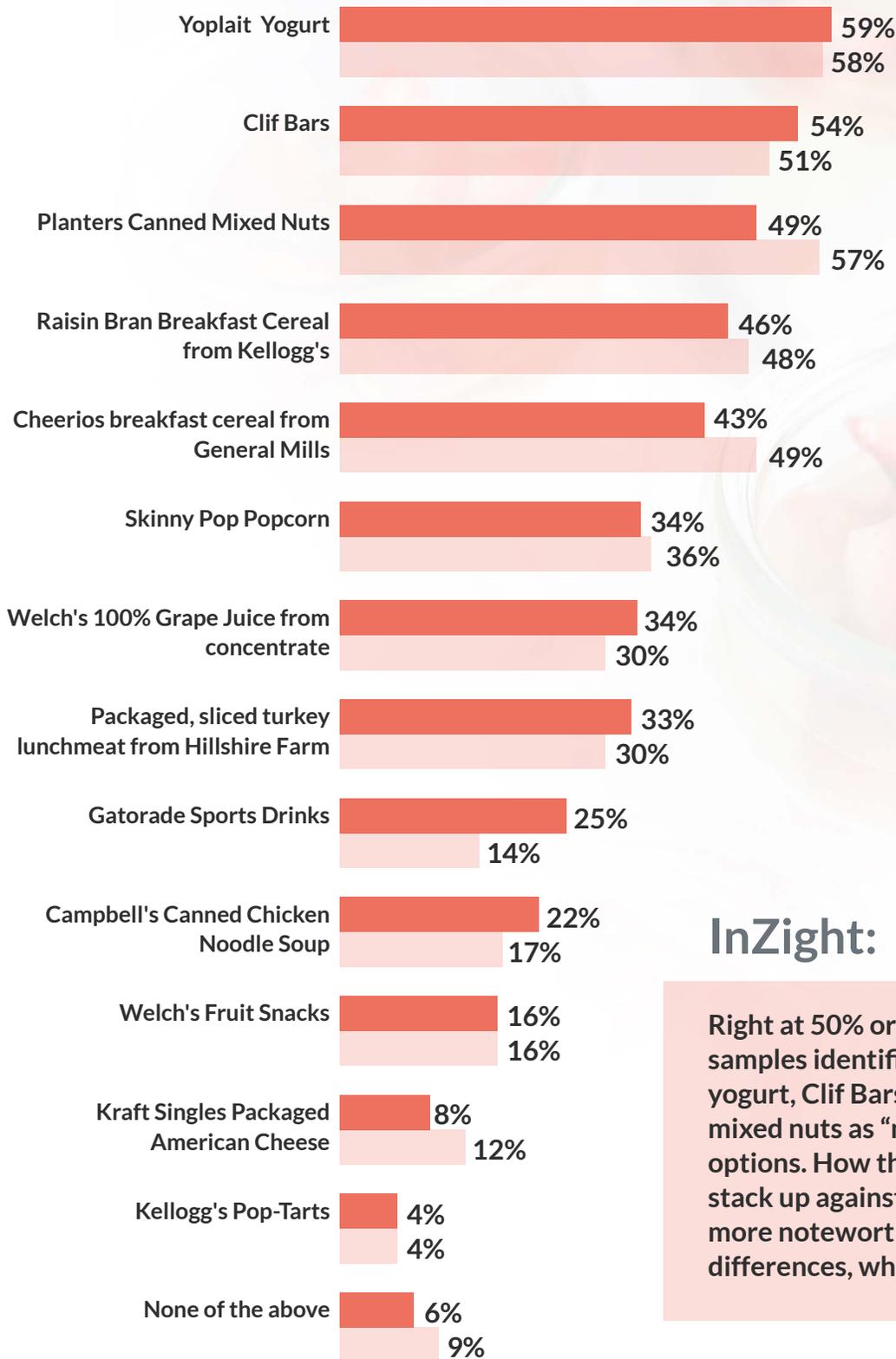
## InZight:

They may only be 18-22, but virtually half of Gen Zers feel they're already eating healthier than their parents, compared to only 25% who feel they're eating less healthy.



# Which of these grocery products would you consider "nutritious"?

Gen Z (N = 775)      40-60 year olds (N = 1,303)



## InZight:

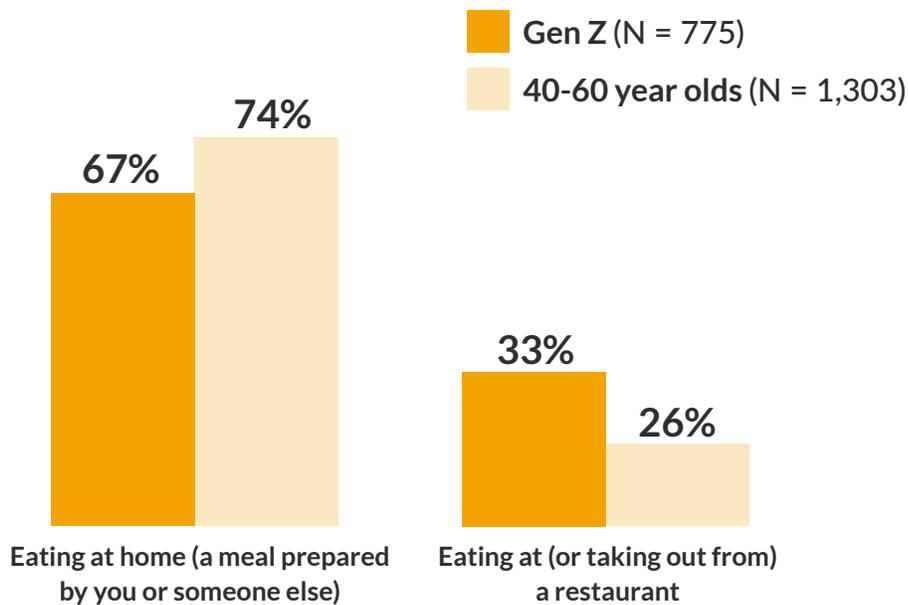
Right at 50% or more of both samples identified Yoplait yogurt, Clif Bars, and Planter's mixed nuts as "nutritious" food options. How the individual brands stack up against one another is probably more noteworthy than any generational differences, which appear relatively minor.





## Eating Out: Which do you prefer?

In answering this question, respondents were instructed to take cost, convenience, social atmosphere, and all other factors into account.



### Gen Z Speaks:

“People are becoming aware that fast food is really bad for you.”

### InZight:

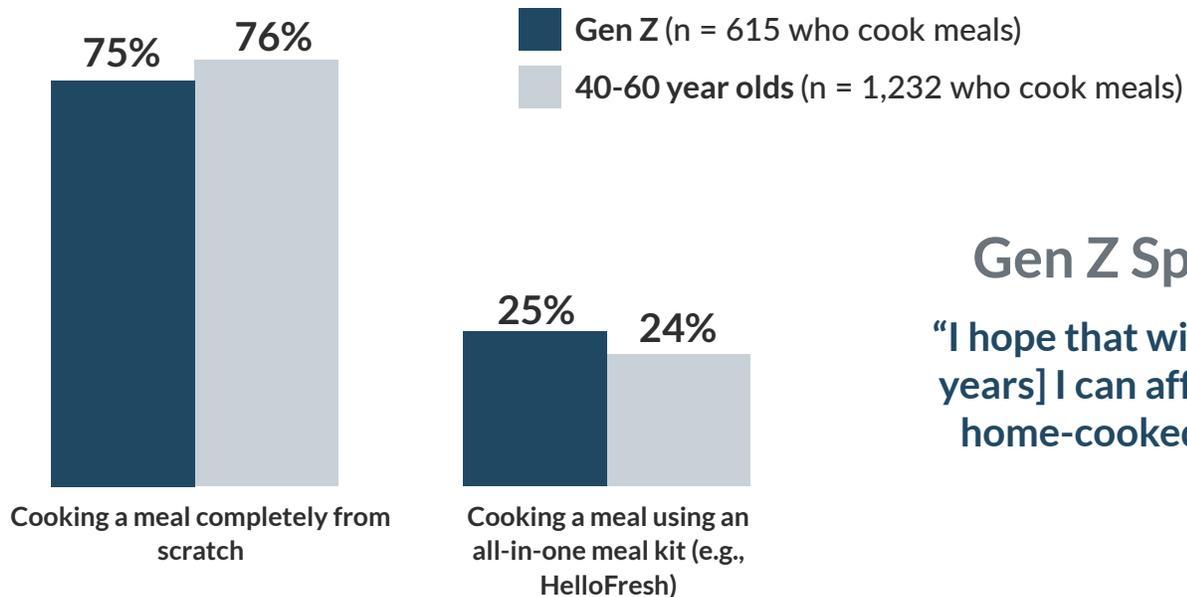
Gen Zers, we’ve been told, will feel right at-home in the kitchen, and the results above don’t suggest otherwise. But, as you can see, Gen Z’s penchant for cooking only resembles that of their parents.





## Cooking: Which do you prefer?

In answering this question, respondents were instructed to take cost, convenience, social atmosphere, and all other factors into account.



**Gen Z Speaks:**  
“I hope that within [5-10 years] I can afford more home-cooked meals.”

### InZight:

In our survey of 775 18-22 year olds, 615 said they’re already cooking meals for themselves or others. Cooking may very well be second nature to Gen Z. Indeed, our Gen Z sample, like our 40-60 year old comparison group, said they prefer cooking from scratch over time-saving (but perhaps more costly) all-in-one meal kits.



# Gen Z Speaks: Our Favorite Grocery Brands

Which grocery brands enjoy “extremely” loyal followings among 18-22 year old consumers? We asked our Gen Z sample to identify one (a) snack brand, (b) drink brand, and (c) meal-prep brand they’re “extremely loyal to.” Significantly, this question was posed as a free-form question, so no choice options were imposed. Below are grocery brands that received more than 20 mentions.

Snack Brand		# of MENTIONS
Extremely Loyal to		
1	Lay's	100
2	Doritos	44
3	Cheez-It	39
4	Nature Valley	22
5	Nabisco	20
5	Kellogg's	20
5	Goldfish	20



Drink Brand		# of MENTIONS
Extremely Loyal to		
1	Coke	155
2	Pepsi	68
3	Dr. Pepper	45
4	Gatorade	40
5	Minute Maid	23
6	Sprite	22



Meal-Prep Brand		# of MENTIONS
Extremely Loyal to		
1	Hamburger Helper	38
2	Tyson	25



# Checking Out

It's early. Very, very early. The first members of Gen Z are only now reaching adult age—with “adult” incomes, living arrangements, and lifestyles to boot.

But what did we specifically learn about Gen Z from this inquiry into their grocery-shopping attitudes and behaviors?

- They're more alike than unlike their parents' generation, at least at this early stage
- They do, however, consider themselves healthier eaters than their parents
- Gen Z grocery-shoppers are currently price-sensitive as well as traditional in their shopping habits (e.g., they haven't adopted digital grocery shopping yet)
- But, they expect major changes to their grocery-shopping methods and priorities over the next several years

In other words, stay tuned.

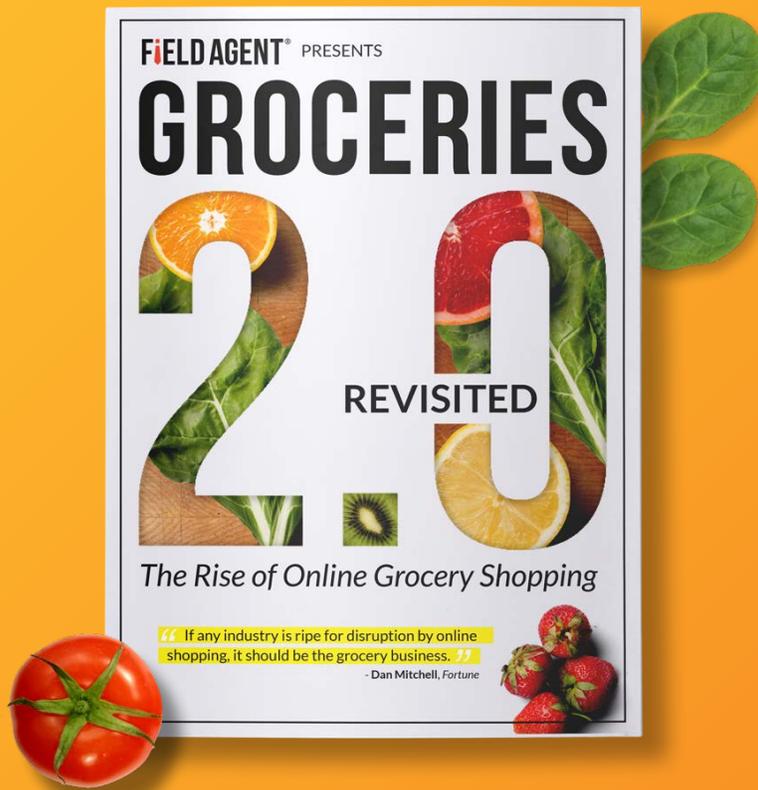
And while much uncertainty surrounds what the future of grocery shopping will look like for the next generation, one thing you can be certain of is that Field Agent and *Endcaps & Insights* will continue to take hard looks at critical issues across grocery-retail.

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# Hungry for More Insights?

Field Agent's special report, *Groceries 2.0 Revisited*, investigates the rise of online grocery shopping. This free report examines grocery pickup, grocery delivery, meal kits, and several state-of-the-art shopping technologies.



[Download the Free Report](#)

# Go Inside the Minds of Today's Digital Grocery-Shoppers

Field Agent's special report, "The Digital Shopper: Insights into Today's Most 'Connected' Customers," explores some of the pressing questions surrounding digital grocery-retail. Based on post-shop surveys with hundreds of online grocery-shoppers, the report even maps out the process of purchasing groceries online.



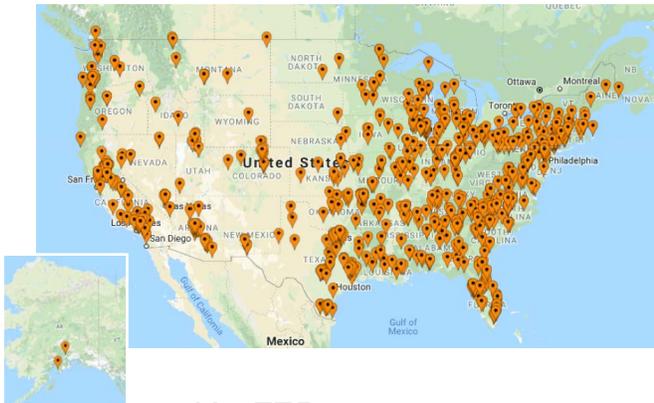
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# Demos & Details

Both surveys were conducted entirely through the Field Agent mobile app.

## GEN Z

Survey Dates: 3/1/19 - 3/18/19



**N = 775** (18-22 yrs old)

### Gender\*:

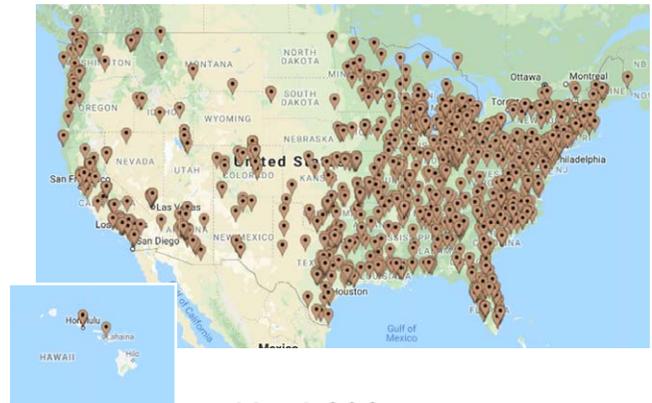
Female: 50%  
Male: 50%

### Race:

Caucasian or some combo: 65%  
African-American or some combo: 17%  
Hispanic or some combo: 13%  
Other: 8%

## "PARENT" (40-60 Year Old)

Survey Dates: 3/4/19 - 3/6/19



**N = 1,303** (40-60 yrs old)

### Gender\*:

Female: 50%  
Male: 50%

### Race:

Caucasian or some combo: 80%  
African-American or some combo: 7%  
Hispanic or some combo: 6%  
Other: 13%

\*Results were weighted to reflect even gender proportions. Other demos are unweighted.

### Household Income\*:

< \$35K: 63%  
\$35-49K: 14%  
\$50-74K: 11%  
\$75-99K: 5%  
\$100K: 8%

### Household Income:

< \$35K: 21%  
\$35-49K: 18%  
\$50-74K: 24%  
\$75-99K: 17%  
\$100K: 21%

\*Household income would include parents' wages in some cases.

Note: 100% of respondents in this age category are either primary or secondary grocery shoppers within their households.

### Living Arrangements:

I live with one or more parents/guardians: 38%  
I live with one or more roommates/friends: 29%  
I live with my wife/"significant other": 19%  
I live by myself: 9%

# Your **Eyes & Ears** in the Digital Age

Wherever business takes your products, customers, and operations in the digital age, Field Agent is ready to capture pictures, answer questions, and keep you in the know about the latest digital developments. In stores, in homes, and practically anywhere in between.

Field Agent has digital retail covered.

Contact Us

