



Consumer survey 2023

Deloitte Retail Sector
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Summary

Every year, Deloitte commissions Flycatcher to conduct a survey to gain insight into supermarket consumer trends, specifically on trends involving product range, spending, diversification, future of food, innovation and development. The trends include self-scanning, online ordering and ready to eat products. This year's focus includes the quality mark 'Super Supermarkt Kenmerk' (SSK).

A total of 2,345 respondents aged 18 and over who regularly visit a supermarket have taken part in the survey.

Grocery shopping



Nearly all Dutch people visit the supermarket at least once a week (94%), averaging at 2-3 times a week. Most respondents always do their shopping in the supermarket (80%), while 17% use both the physical supermarket and the online supermarket. The percentage of respondents who only shop online has dropped significantly compared with 2021 (from 4% to 3%).

Almost a fifth of respondents who go grocery shopping do so at the same supermarket, both physically and online. Well over a third do their grocery shopping online at the same supermarket as the physical supermarket – although they sometimes switch to another online supermarket – while 44% go to a different supermarket. As figure 1 shows, the main reasons for choosing different online supermarkets than the physical supermarkets are a lack of online shopping options and lower prices. Another 20% indicated that their own supermarket fails to offer the products they can get online. The coronavirus effect (7%) has dropped significantly from 2021 (17%).

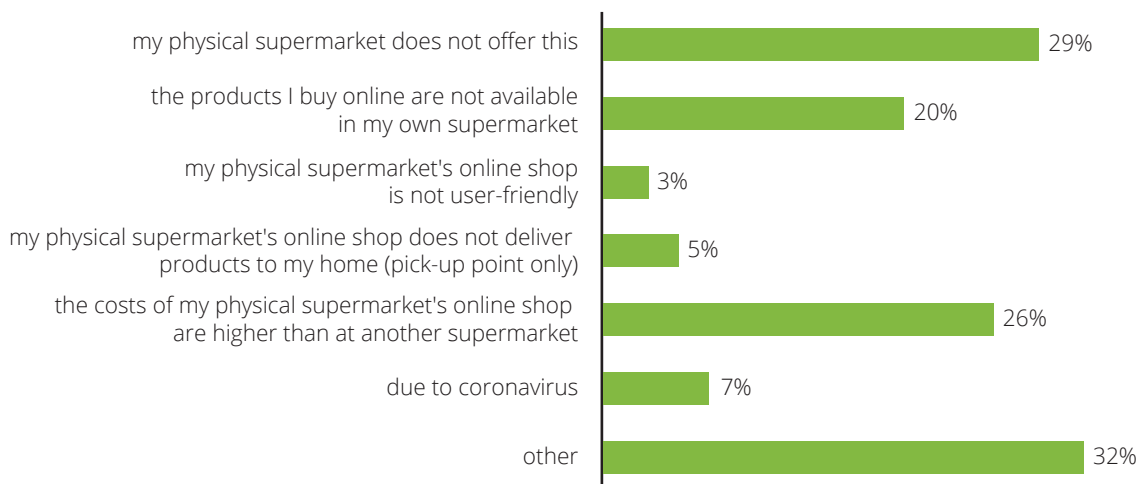


Figure 1: Why do you (sometimes) go grocery shopping online in a different supermarket than where you do your physical grocery shopping?

Like last year, two-fifths of respondents generally feel shopping is fun, or even great fun (both physically and online) and over a tenth do not like it (at all). Out of all respondents, 44% feel grocery shopping in the physical supermarket is fun (or even great fun) and for online supermarkets this is 21%.

Well over two-fifths of respondents use a digital leaflet at least once a week for weekly shopping (44%), a significant increase from last year's 40%. Like last year, half of them use a paper leaflet at least once a week. Almost a quarter consider an appealing offer in a digital or physical weekly leaflet to be a reason to visit another supermarket, a significant rise from the previous two years. Four-fifths of respondents (80%) check things out before they go shopping, particularly by thumbing through supermarket leaflets (60%). Compared with previous years, respondents increasingly check the ads (from 6% in 2021 and 9% in 2022 to 10% now). The number of respondents who check the displays in supermarkets has risen too, compared with 2021 (from 12% in 2021 to 15% now), as opposed to a drop in the percentage of people using the supermarket formats' internet sites from 15% in 2021 to 12% now.

Self-scanning 

Well over four-fifths of respondents (86%) say their supermarket offers self-scanning services, a significant rise from the 78% in 2021. Consumer use of self-scanning services has risen as well: 81% of respondents now use self-scanning services compared with 74% in 2022 and 73% in 2021. They mainly use the self scanning checkouts (76%) - this use shows a strong rise - and self-scanning devices (57%), although this use shows a significant drop. The main reason for respondents not to use self-scanning services is because they prefer to have contact with a cashier (51%) or because they rather pay in cash (38%).

Almost a tenth say they sometimes come home and realise they forgot to scan some of the products, while 2% admits to deliberately not scanning products sometimes. As about two-thirds suspect others to sometimes forget to scan products (66%) or deliberately fail to scan products (68%), an overwhelming majority (91%) is okay with groceries being checked at self-scanning checkouts. One fifth consider self scanning to be annoying and 15% feel they are being singled out for checks every time.

Ordering groceries online 

Like last year, most respondents do their online grocery shopping at Albert Heijn (see figure 2).

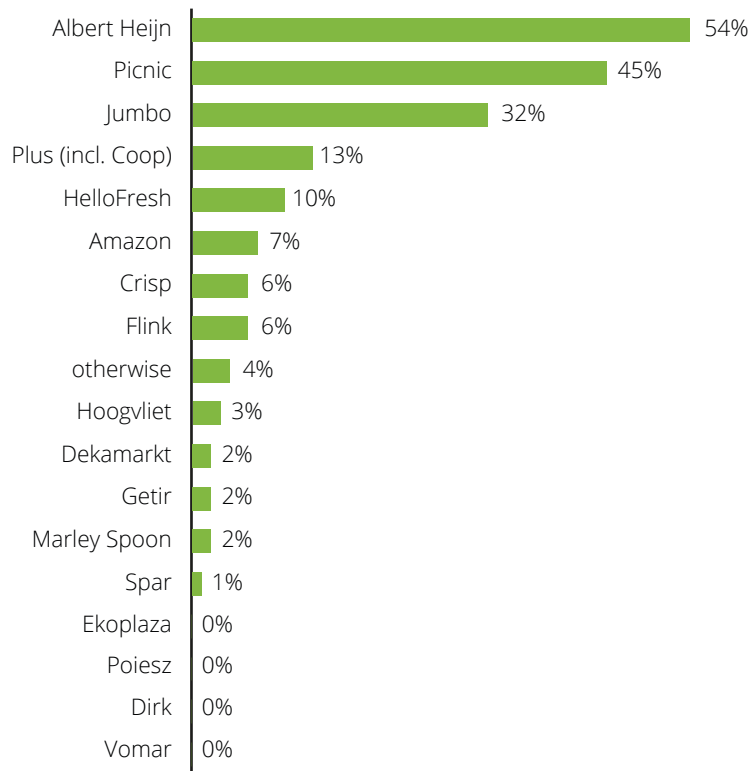


Figure 2: From which online supermarket(s) have you ever ordered products?

Well over two-thirds of respondents who have ever used flash delivery services do so because they need something urgently (71%).

Virtually all respondents who order groceries online prefer to have groceries delivered to their homes (96%). Respondents who shop both online and in physical shops buy about 53% of total groceries in physical shops and 47% online - a change from 2021, when they bought 46% in physical shops and 54% online. Most online purchases involve soft drinks, while fruits and vegetables, meat and fish, bread and alcoholic beverages are mostly bought in physical shops. Respondents who do their grocery shopping at physical supermarkets mostly do so at Albert Heijn (80%), Lidl (59%) and Jumbo (57%).

The main reasons for respondents never to order online is the supermarkets' proximity to their homes (58%); grocery shopping in a physical supermarket is more fun (46%); they want to check out the products first (44%); and they are against paying extra for this (39%).

Out of all respondents, 14% wants to do their grocery shopping online in the future if supermarkets offer this option, this share has been declining from 2021. Another 11% says they will go and do their grocery shopping at another supermarket in the future, if their own supermarket fails to offer online grocery shopping. The vast majority (95%) will not be using flash delivery services in the future.

Well over two-thirds of respondents use a supermarket app, mostly for looking up offers and saving points. Users have been consulting an app almost as frequently as in previous years. Well over four-fifths of respondents (83%) use the app at least once a week. Albert Heijn's app is still the most used app, by far.

Sale of alcohol and tobacco



Respondents have few qualms about alcohol being sold in supermarkets, although 14% of them - up from 2022 and 2021 - believe it should be banned. One in five respondents think supermarkets should refrain from offering alcohol. More than a third (37%) think alcohol, including wine and beer, should be sold in segregated areas in supermarkets. Respondents are more anxious about the sale of tobacco: three-fifths (60%) think cigarettes should (most definitely) not be offered for sale in supermarkets.

Another 11% of respondents were found to smoke. Almost two-thirds of them buy their smoking materials from physical supermarkets and 4% from online supermarkets. Once smoking materials are no longer available in supermarkets (or online supermarkets) from 1 January 2024, smokers will start buying their smoking materials mainly from tobacco shops (70%), with 4% of smokers saying they will then quit. The vast majority says the unavailability of smoking materials in supermarket will not affect how often they visit supermarkets: 86% will visit the supermarket just as often.

Local and community involvement



Well over a quarter of respondents have signalled the supermarkets to have some or a strong neighbourhood involvement. A tenth of respondents consciously choose a shop that is involved in the neighbourhood (11%). The local involvement of an online supermarket is less important; 5% states local involvement to be a reason for choosing an online supermarket. The percentage of respondents rating their current physical supermarket's CSR policy as good to very good has dropped significantly, from 42% in 2022 to 37% now. Their view of their current online supermarket's CSR policy has hardly changed; 26% rate it as good to very good. Almost a fifth (17%) consciously choose a socially responsible shop. The number of respondents refraining from such a deliberate choice has risen significantly, going from 32% in 2021 to 38% now. Well over a quarter (26%) believe the supermarkets should pay more attention to the 'National No Meat Week' (Nationale Week Zonder Vlees), while almost two-fifths (38%) disagree.

'Super Supermarkt Kenmerk'



Of the respondents, 7% had heard of the 'Super Supermarkt Kenmerk' (SSK), a quality mark awarded to supermarkets. Of these, 31% said their supermarket has this quality mark.

The SSK is based on seven pillars: sustainable energy, local involvement, distinctive product range, conscious waste reduction, safe environment, invigorating personnel policy, and smart logistics. Respondents consider the pillars safe environment, conscious waste reduction, invigorating personnel policy and smart logistics to be particularly important. When asked to rate their own supermarket for the 7 pillars, a safe environment scored best with a 7.5 average.

Future of food



The trend is less meat and more meat substitutes. Of the meat-eating respondents, 41% eat meat five times a week or more, 39% eat meat three or four times a week and 20% eat meat less than three times a week. Well over a third (35%) of all respondents eat less meat than in previous years and 6% eat no meat. Another 27% plan to eat less meat next year than this year. The main reasons for not eating meat or eating less meat are animal welfare (57%), their own health (53%), and reducing their own ecological footprint (50%).

Of the fish-eating respondents, 1% eat fish five times a week or more often, 64% eat fish two to four times a week and 35% eat fish once a week or less often. Well over one in seven (13%) of all respondents eat less fish and 11% eat more fish than in previous years, while 7% want to eat less fish next year than this year. On the other hand, 13% want to eat more fish.

Of the respondents who eat meat substitutes, 4% eat meat substitutes five times a week or more, 61% eat meat substitutes one to four times a week and 35% eat meat substitutes less than once a week. Almost a quarter (22%) of respondents started eating more meat substitutes this year and 16% plan to eat more meat substitutes in the coming year.

Sustainability



Sustainability factors are generally important in buying products from the supermarket (or online supermarket). Their importance is growing for all factors. The main factors are the degree of animal suffering (71%), the degree of human exploitation (69%), the use of pesticides (68%) and the amount of waste/dissipation (64%). The extent to which products are good for one's health is important to 74%. About half of the respondents turns out to need more, or much more, information on products in terms of whether they are good for their own health (51%), the use of pesticides (50%) and the degree of animal suffering (48%).

In determining whether products are healthy, respondents mainly trust their own knowledge about how healthy products are (66%), the products' nutritional values (46%) and the products' calories (36%).

Nutritional supplements



A third of respondents use nutritional supplements every day, while 20% use them occasionally. Almost three quarters of respondents used the same amount of nutritional supplements this year as in previous years and 20% used more nutritional supplements.

The primary, secondary and tertiary supermarket



Respondents spend an average of EUR 118 per week in the physical and online supermarkets - some EUR 52 per household member. Table 1 shows the distribution among primary, secondary and tertiary supermarkets.

	total unweighted	total weighted	weighted per family member
average amount spent in primary supermarkets	EUR 79,27	EUR 79,27	EUR 34,92
average amount spent in secondary supermarkets	EUR 30,50	EUR 27,30	EUR 11,97
average amount spent in tertiary supermarkets	EUR 19,37	EUR 11,72	EUR 5,12
total	EUR 129,14	EUR 118,29	

Table 1: weekly spending

The distribution of spending among primary, secondary and tertiary supermarkets is similar to last year, although spending in both the primary and secondary supermarkets is significantly higher than in 2021 and 2022. On average, primary supermarkets are visited twice a week, while for the secondary and tertiary supermarkets this is once a week or less. Compared with 2021, the primary, secondary and tertiary supermarkets are visited more often. Albert Heijn is still the most visited supermarket by far (69%), followed by Lidl (43%) and Jumbo (42%).

Two thirds of the respondents use loyalty cards from primary supermarkets, while 49% use them from secondary supermarkets and 32% from tertiary supermarkets. The use of loyalty cards at secondary supermarkets has increased significantly since 2021.

The 7.8 rating of the primary physical and online supermarkets is significantly less good than in 2021, when they had an 8.0 rating. Across the board, the rating of the quality aspects is good, though slightly lower than last year. At 8.1, parking facilities are rated best. The distance, people having familiarised themselves with where they can find all the products, and good value for money are the key factors determining the bond with the primary physical and online supermarkets. The percentage of respondents indicating that good value for money determines the bonding has dropped significantly: from 42% in 2021, 40% in 2022, to 36% now. At 8%, the number of respondents who made a switch to a different primary physical and online supermarket in the past year, is comparable to 2022 and 2021 (both 7%). People mainly switched from Albert Heijn and Jumbo, with the main reasons for switching supermarkets being price (55%), distance (19%) and product range (18%).

Price increases



An overwhelming 89% majority worries about rising food prices. The percentage of respondents indicating that their worries have led them to adjust their buying behaviour has increased significantly, from 67% in 2022 to 75% now. They have notably opted to buy cheaper products and buy products on sale (more often), buy less, and visit a greater variety of supermarkets.

Quality aspects of the supermarkets



Respondents still consider price to be the most important aspect of a good supermarket, followed by the shop's proximity to their homes. After price and distance, the most important aspects are fresh produce and wide choice of fruits and vegetables, good-quality house brands, well-stocked shelves, friendly staff and good parking facilities.

Transport to the supermarket and parking



As in the past two years, well over two-fifths of respondents (42%) take the car to go to the supermarket, 31% take a moped or bicycle and 23% go on foot. The average distance to the supermarket is 2.10 kilometres. Respondents take an average of almost seven minutes to cover this distance.

Almost all of the respondents (96%) who go to the supermarket by car mention the abundance of parking spaces available at the primary supermarkets. The type of parking facility is a reason why 71% of the respondents no longer visit the supermarket, with insufficient parking space (50%) or the parking facility being too far away (42%) being mentioned as the main reasons.

The product range



Respondents say the main aspect of a supermarket's product range is a well-stocked fruits and vegetables section (see figure 3). The top 5 is supplemented by a sufficient supply of products, ample choice of fruits and vegetables, good-quality house brands, and good-quality bread. Compared with previous years, respondents consider almost all aspects (except for ample choice of house brands, good-quality house brands and ample choice of C-brands) to be less important.

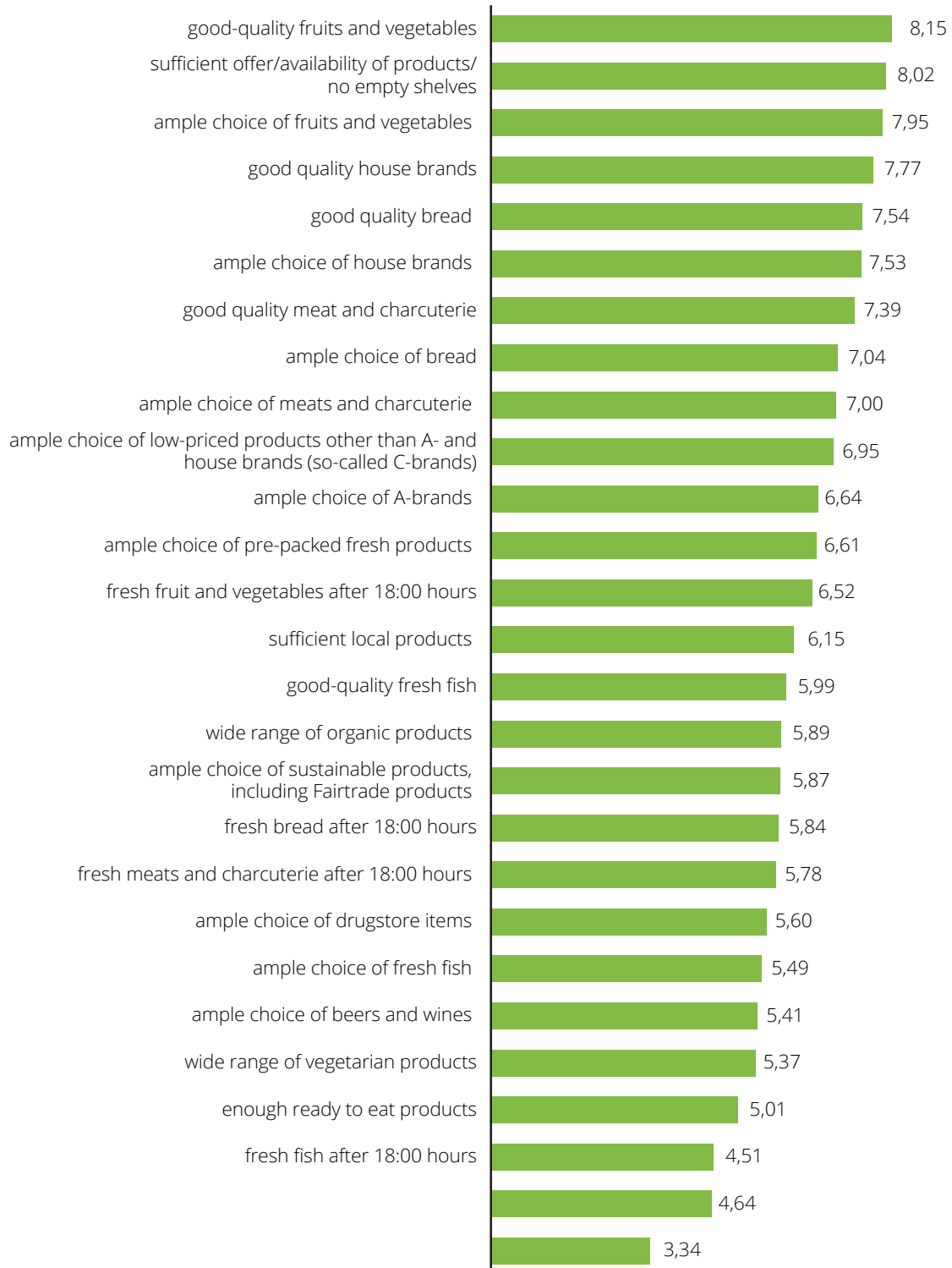


Figure 3: How much importance do you attach to the following aspects of a supermarket's product range? (1 =not important; 10 =extremely important).

A quarter of respondents do not or no longer visit a particular supermarket because of its product range. Aldi (29%), Lidl (10%) and Plus (incl. Coop) (10%) are the most frequently mentioned supermarkets where the product range is the reason why people no longer visit them. The product range is a specific reason to visit a particular supermarket more often for 42%. The main supermarkets where people go more often because of their product range are Albert Heijn (53%), Jumbo (22%) and Lidl (20%).

Diversification



Seven tenths (70%) sometimes buy foodstuffs from shops other than supermarkets, especially from specialist shops (35%), at the market (33%), Action (25%), drugstores (23%) and HEMA (22%). The main reasons for buying foodstuffs from somewhere other than supermarkets are quality, products being unavailable in supermarkets, and price (see figure 4). Spending in shops other than supermarkets amounts to well over 6.6% of total spending in physical and online supermarkets, almost the same as last year.

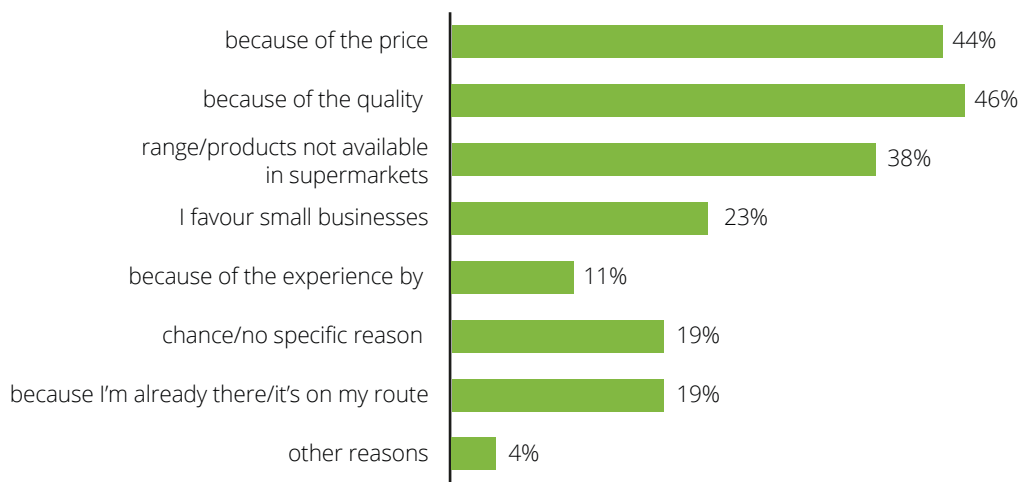


Figure 4: Why don't you buy these foodstuffs in physical and online supermarkets but somewhere else?

Payment method



The number of people who (almost) always use pin/contactless payments at the supermarket is about the same as in previous years: 77%. The percentage of people willing to pay exclusively by pin/contactless payments if they were asked to do so has dropped significantly, from 71% in 2021 and 68% in 2022, to 63% now. The main reason for not always opting for pin payments is that people want to decide for themselves how to pay right there and then.

Ready to eat products



Respondents eat breakfast and dinner at home on (well over) six days a week, while they lunch at home on almost five days a week. This is significantly less than in 2021. People buy ready to eat products on average once a week, mostly for dinner and mainly in a physical or online supermarket (63%).

The supermarket experience



The main reason for respondents to visit a particular supermarket is the few times they are being told 'no' (67%). Respondents also visit a particular supermarket because of the loyalty card (49%), the offer of special products (43%) and because they take energy-efficient measures when constructing and designing their shop (32%).









Innovation



Respondents suggest various ways in which primary physical and online supermarkets can improve, such as lower prices/not letting prices rise too much, more sustainability and less plastic or other packaging. Other respondents, though, do not see the need for improvements. Out of the proposed innovations, the respondents consider the option to buy packaging free the most appealing, for 28% of the respondents this is a highly appealing option. This percentage has dropped significantly since 2022 (31%), though. The possibility of buying packaging-free would be a reason to switch to another physical or online supermarket for 22%.



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