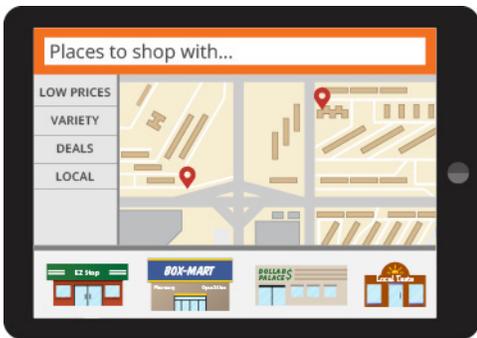


You won't eat unless you shop. The saying remains true even as options for planning, shopping, and preparing meals multiply, spanning brick-and-mortar options to online delivery choices. New players on the retail landscape, smart kitchen appliances, ubiquitous smartphones, paid shopper memberships (ex. Amazon Prime), and voice-engaged devices are all affecting how home cooks pursue grocery shopping today. Consumers' increased attention to what they're eating, where it's grown, how it's processed, and how it tastes also play a role in where cooks shop. In its annual investigation to determine motivations driving home cooks' shopping activities, Allrecipes shares what appeals most to hungry, family-focused and budget-minded cooks in this issue of the Measuring Cup Trend Report.

INSIGHT #1 Cost and Selection Top Shopping Lists



When asked what influences their preferred grocery shopping location, “large product variety” (71% overall), followed by “low prices” (69% overall), “convenient location” (69% overall), and “favorite brands” (67% overall) were online home cooks' top responses. In addition to these influences, Millennial home cooks are also likely to say the “availability of fresh and packaged organic foods” and “ethnic foods” play a role in their destination decisions. While not yet a requirement for most shoppers, interest is growing in online shopping—with one in ten considering home grocery delivery “very important” in determining where they shop.

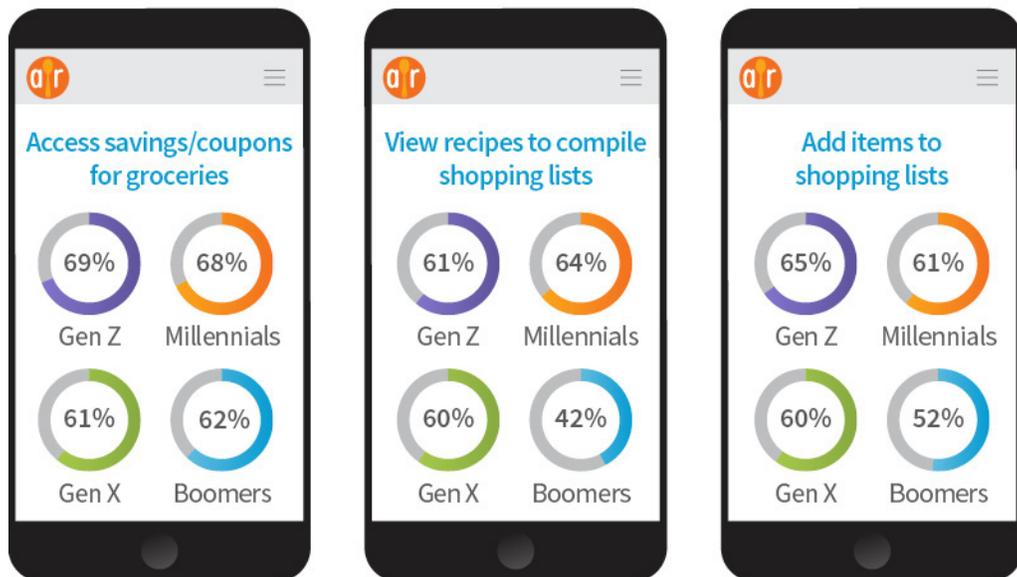
“Very Important” to online home cooks when selecting a grocery store

	Gen Z	Millennials	Gen X	Boomers
Low prices	80%	77%	70%	60%
Large product variety	75%	70%	68%	72%
Availability of favorite brands	71%	61%	69%	71%
Frequent sales/product specials	61%	62%	66%	56%
Finding foods to meet my dietary requirements	51%	44%	40%	42%
Availability of fresh organic foods	37%	34%	29%	28%
Availability of products made or grown locally	25%	31%	24%	31%
Availability of ethnic ingredients	35%	23%	13%	13%
Availability of packaged organic foods	27%	21%	16%	16%
Finding authentic prepared ethnic foods	29%	18%	12%	9%
Availability of ready-to-eat meal options	25%	18%	15%	8%
Availability of private label products	16%	17%	20%	20%
Ordering online and in-store pick-up options	12%	14%	8%	3%
Ordering online for home delivery	10%	12%	7%	3%

INSIGHT #2 Milk, Bananas, Broccoli, and Smartphones

Mobile devices are essential companions for busy, family-focused home cooks: nearly all (97%) say they rely on their smartphones to assist with their grocery shopping and cooking activities. Among busy parents, the most common use of smartphones for meal planning is finding ideas and inspiration (71%), seeking grocery offers and coupons (69%), and using online recipes to fill out their shopping lists (62%).

% of Online Home Cooks Using Phones to...

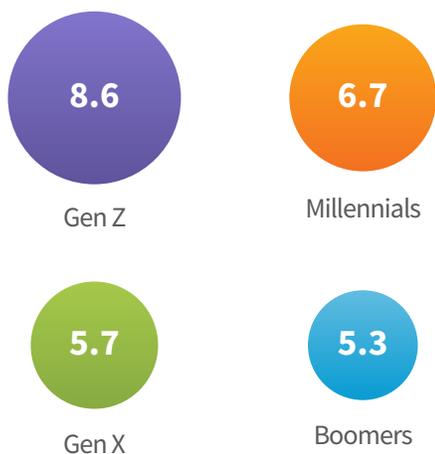


INSIGHT #3 To Market, to Market...

From ethnic markets and farmers' markets to warehouse stores and online shopping, with everything in between, the number of varied retailer options competing for the interests and needs of grocery shoppers continues to diversify, fragment, and expand. Gen Z shoppers are most likely to take advantage of the many different retailer types to satisfy their curiosities and needs, purchasing goods from as many as nine different outlets in a single month. Despite so many choices, large supermarket chains followed by mass merchandise stores such as Walmart and Target remain the top outlets of choice across all ages—including Gen Z—for big basket weekly stock-up trips.



Number of Grocery Outlet Formats Shopped at Monthly or More Often



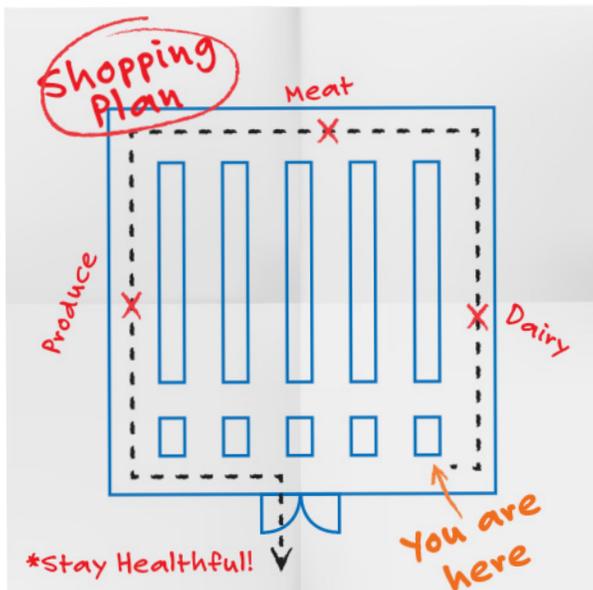
Store Types Typically Shopped at Once a Week or More

	Gen Z	Millennials	Gen X	Boomers
Large supermarket chains	45%	64%	63%	69%
Walmart and/or Target	59%	47%	44%	36%
Convenience stores	41%	23%	18%	10%
Ethnic markets	27%	7%	7%	2%
Discounters (ex. dollar stores etc.)	25%	16%	22%	11%
Premium stores (ex. Whole Foods)	24%	16%	10%	9%
Warehouse stores (ex. Costco)	20%	16%	12%	12%
Wholesale groceries (ex. Cash&Carry)	18%	16%	13%	10%
Farmers' markets/Farm stands	12%	9%	10%	7%

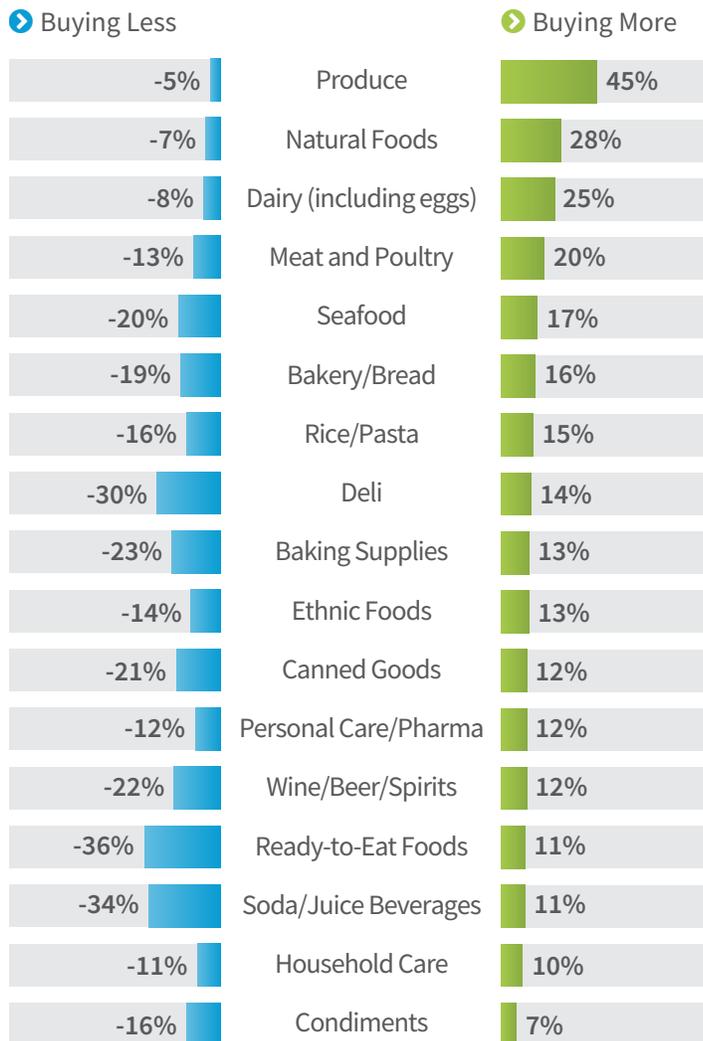
INSIGHT #4 Prioritizing the Perimeter



Changes in Product Purchase Volume at Grocery Stores vs. a Year Ago



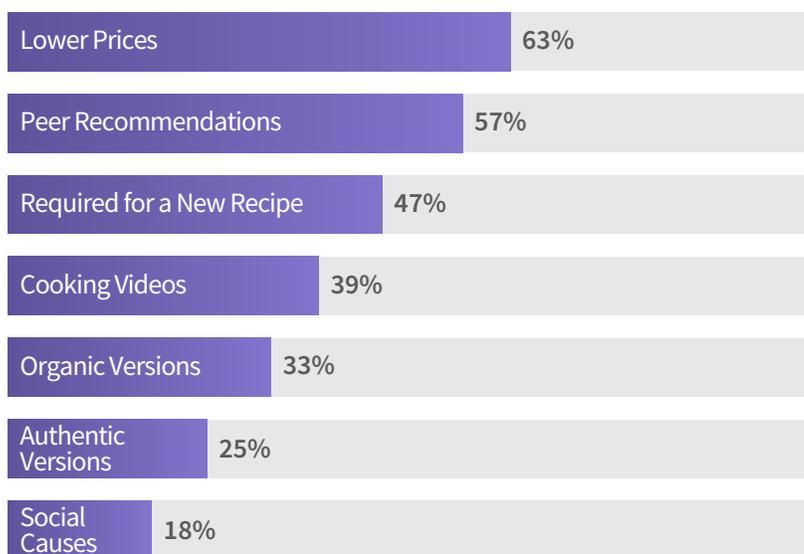
Home cooks' heightened focus on healthful eating has them spending more time shopping the perimeter of the grocery store, the prime area for choosing fresh produce, meats, dairy products, and poultry to stash in their carts. This focus on fresh, combined with an emphasis on reducing the amount of sugar, sodium, and processed foods consumed as part of family and personal diets is likely behind the decreased demand for soda/juice, deli foods, condiments, and canned goods found in the center aisles.



INSIGHT #5 Gen Z Hits the Grocery Aisle and Kitchen

As they begin migrating from dorm rooms and their parents' homes into their own apartments, adult Gen Z home cooks (aged 18-23 years) are providing a first glimpse at this group's grocery shopping behaviors. While student loans and entry level jobs typically make smaller grocery budgets necessary, early data indicates these shoppers are more spontaneous and adventuresome when compared with their older counterparts. Most of Gen Z home cooks report enjoying "discovering new products" when grocery shopping, and say the top influences prompting them to try new products and investigate brands are "lower cost than their typical brand" (63%), "peer recommendations" (57%), and "ingredient required for a recipe" (47%).

Factors Driving Gen Z to Try New Products



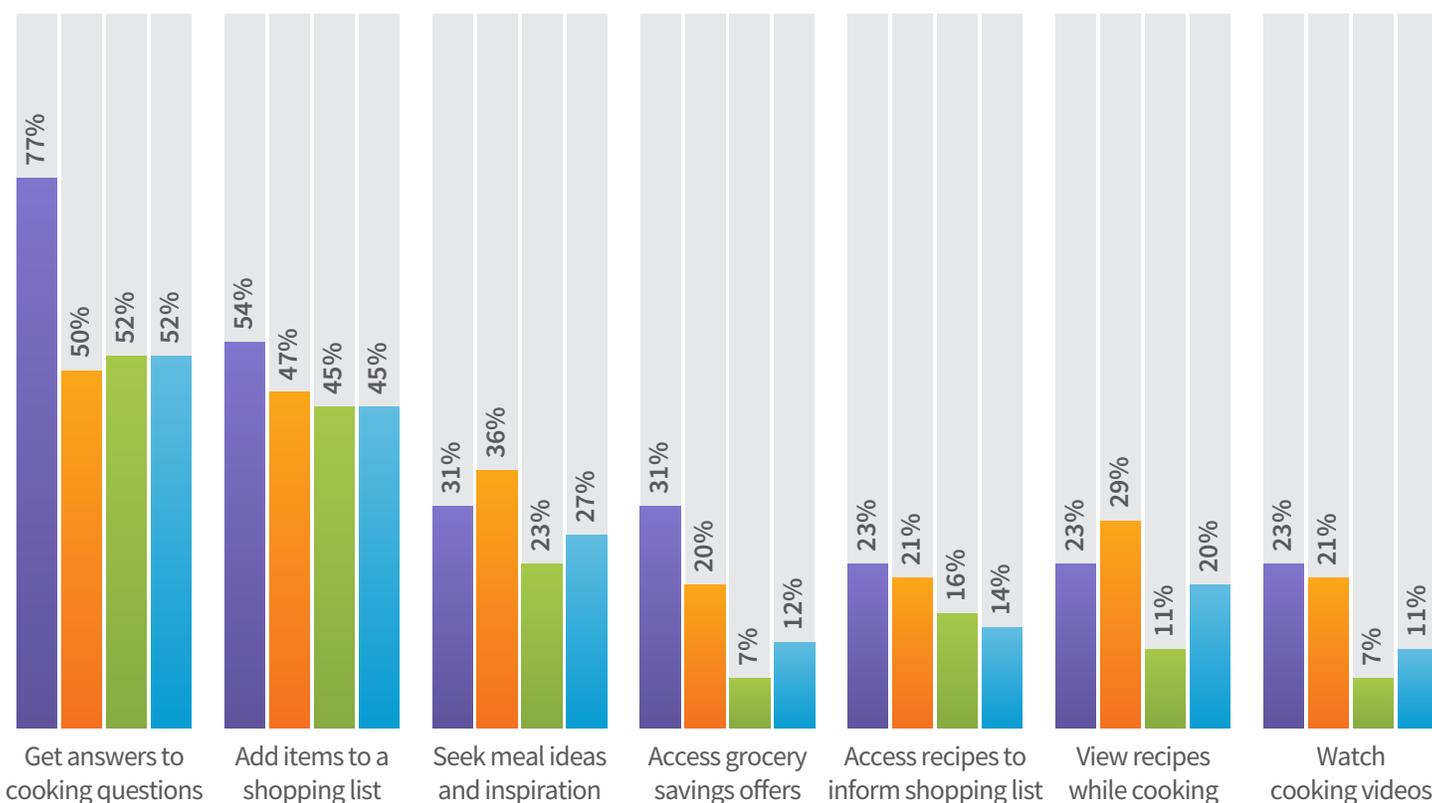
INSIGHT #6 Good-bye Flour Dusted Screens

Smart speakers, offered by technology leaders Amazon, Google, Samsung, and Apple, are among this year's hottest selling consumer tech products. Families owning these devices are quickly putting them to use to simplify many common activities including playing music, controlling interior lights, tracking schedules, and for more than half of those surveyed, helping with day-to-day cooking. Answering cooking questions is the most common use among home cooks owning smart speakers, but one in three consult their speakers for meal inspiration ideas, and one of five are using their device for step-by-step cooking instruction through recipes and videos. These adoption rates are expected to increase as home cooks upgrade to smart speakers with screens.



Use of Voice Technology Among Online Home Cooks Owning Smart Speakers

Gen Z Millennials Gen X Boomers



INSIGHT #7 Voice-Guided Cooks Are Reimagining the Cooking Journey

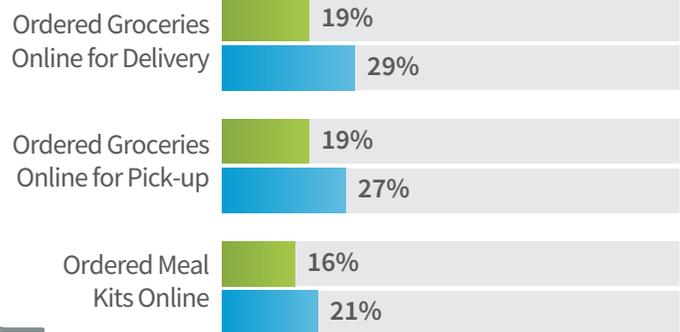
Not surprisingly, cooks embracing voice-guided technologies such as smart speakers and smart refrigerators for cooking tasks are also more likely to use these technologies to simplify grocery shopping. Among survey respondents who own a smart speaker, 29% have tried ordering groceries online using a home delivery service, 27% have ordered groceries online for curbside pickup, and 21% have purchased meal kits.



Online Grocery Shopping

▶ TTL Online Home Cooks

▶ Online Home Cooks with Smart Speakers

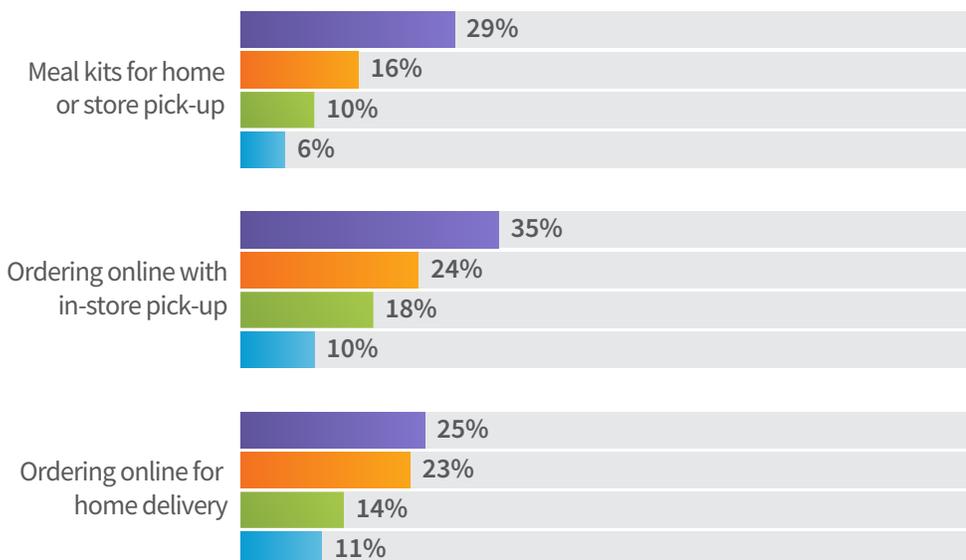


INSIGHT #8 Click-to-Cart Catching On



Ordering Groceries and Meal Kits Once a Month or More

▶ Gen Z ▶ Millennials ▶ Gen X ▶ Boomers



Online technologies have transformed how consumers shop for numerous consumer goods, from fashion and books to entertainment and consumer electronics. Given the U.S. grocery industry's size and significance, it's not surprising the category is moving quickly to the center of ecommerce disruption. Already, nearly half (48%) of all respondents in Allrecipes' 2018 Grocery Trends Survey say they have tried online grocery shopping, which includes online grocery delivery and/or online grocery ordering with store pick-up and meal kits, at least once, with Gen Z and Millennial cooks demonstrating the highest level of interest. Despite this strong pursuit, for the time being, online grocery appears to be based more on curiosity than routine behavior.



Methodology

Data cited in this Measuring Cup is taken from the 2018 Allrecipes Grocery Trends Survey completed in February 2018 by 1,001 home cooks defined as U.S. adults age 18+ (M/F), who are the primary grocery shopper, cook at home one or more nights per week, and view food content online (sample acquired from ProdegeMR).

About Allrecipes

Allrecipes, the world's largest food-focused social network, receives more than 1.5 billion visits annually from home cooks who inspire and inform cooking through shared recipes, photos, reviews, collections, profiles, and videos. Since its launch in 1997, the Seattle-based digital food brand has served as a dynamic, indispensable resource for cooks of all skill levels seeking trusted recipes, entertaining ideas, everyday and holiday meal solutions, and cooking instruction. Allrecipes is a global, multi-platform brand with 19 sites, three mobile apps, and 15 eBooks serving 23 countries in 12 languages. *Allrecipes* magazine, recognized by MIN as the 2013 Magazine Launch of the year, boasts a readership of 7.6 million cooks.

About Meredith Corporation

Meredith Corporation (NYSE:MDP; meredith.com) has been committed to service journalism for more than 115 years. Today, Meredith uses multiple distribution platforms — including broadcast television, print, digital, mobile and video — to provide consumers with content they desire and to deliver the messages of its advertising and marketing partners.

Meredith's National Media Group reaches nearly 200 million unduplicated American consumers every month, including 85 percent of U.S. Millennial women. Meredith is a leader in creating content across media platforms and life stages in key consumer interest areas such as entertainment, food, lifestyle, home, parenting, beauty, fashion, news and sports. Meredith also features robust brand licensing activities including more than 3,000 SKUs of branded products at 4,000 Walmart stores across the U.S. and at walmart.com, as well as innovative business-to-business marketing solutions provided by Meredith Xcelerated Marketing.

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