Grocery Shopping
Consumer Segmentation
An analysis of 1,104 U.S. shoppers
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Introduction

Grocery shopping doesn’t look the same as it used to. Today’s consumers no longer use price as the sole deciding factor for choosing which store to buy from. Convenience, healthy food options, online delivery or pick-up availability, and brand loyalty among many other factors drive a customer’s buying behavior.

After surveying 1,104 consumers across the U.S., Drive Research quickly learned that consumers distinctively have different needs. Based on these results, we created seven shopper profiles that showcase the attributes, motivations, and demographics of varying market segments.

Our hope is that grocery stores can use this information to make data-driven decisions that help establish lasting relationships with their customers.

GEORGE KUHN
Owner & President

DriveResearch.com
Background & Methodology

Objectives
Drive Research completed a grocery shopping consumer segmentation study in August of 2022. The survey aimed to look at the current landscape of grocery shoppers and identify underlying consumer segments. The insights ultimately will help grocery stores and consumer packaged goods brands understand the different needs and preferences of grocery shopper segments.

Approach
Drive Research conducted an online survey that included 42 questions. The survey received 1,104 census representative responses.

With a probabilistic sample, a total of 1,104 responses at the 95% confidence level offers a 2.9% margin of error. If the survey were conducted with another random pool of 1,104 respondents, the results would yield within +2.9% or -2.9% of the stated totals in the reports.

To collect the input variables for consumer segmentation, a MaxDiff exercise was included in the survey. Respondents completed trade-off scenarios with 50 unique statements about grocery shopping behaviors and attitudes. A latent class analysis was then conducted with the MaxDiff results to identify seven consumer segments within the grocery shopping space.
Key Findings

**Young Spenders**, though less differentiated than other segments, are worth prioritizing for a grocery business over the next several years.

This segment is the largest (28% share), youngest (3 in 5 are Millennial or younger), and biggest spenders ($200 average spend per grocery trip).

**Online delivery or curbside grocery services appear to have found a lasting market.**

Only 69% of monthly grocery shopping was completed in a physical store across the total sample. For the Anti-Shoppers segment, over half of their monthly grocery shopping (58%) occurs via delivery services, curbside/pickup services, or another non-physical way.

**Two common traits across the segments were looking to cut costs whenever possible in the grocery store and a tendency to visit the same grocery store.**

The only segment that did not overwhelmingly agree with these statements was the Health-Conscious Families segment. These shoppers desired more variety in their groceries and sought more organic (ergo pricier) items.

**The second largest segment, Grocery Enthusiasts, represents shoppers who genuinely enjoy the grocery shopping experience and cooking their own meals.**

This is a group worth catering to with in-store displays, cooking classes, and experiential offerings like tastings.

**The most avid couponers and bargain hunters fit into the Frugal Do-it-yourselfers segment.**

These grocery shoppers should be targeted with sales, promotions, and discount brands. They are also the most likely to be picking out their own groceries versus a hired shopper.
Defining Attitudes

- Organic and natural foods are their first choice
- Prefers preparing their own food at home
- Go out of way to purchase healthy grocery items
- Interested in new plant-based alternatives

Purchasing Behaviors

- Average Grocery Trip Spend: $173
- Average Grocery Trips Per Month: 12
- Average Time Spent Per Grocery Trip:
  - < 30 mins.: 42%
  - 30 - 44 mins.: 30%
  - 45+ mins.: 28%
- Days for Purchasing Groceries:
  - Weekday: 36%
  - Weekend: 37%
  - No particular day: 27%

SEGMENT 1

Health-Conscious Families

n=78 (7%)

Grocery Shopping Habits

- Top Methods of Carrying Groceries:
  - Full-size cart (56%)
  - Small cart: 21%
- Typical Grocery Shopping Locations:
  - Mass merchandiser (62%)
  - Mainstream grocery chain (59%)
  - Natural/specialty grocery chain (51%)
  - Online retailer (40%)
  - Local independent grocery (33%)

Share of Monthly Grocery Shopping

- Curbside or pickup: 13%
- Delivery service/app: 18%
- Other: 7%

Physical store: 62%
**Demographics: Health-Conscious Families**

**Nearly 1 in 2 are a Millennial**
- Traditionalists (1%)
- Baby Boomers (21%)
- Gen X (20%)
- Millennials (45%)
- Gen Z (13%)

**The slight majority is female**
55% are females while 45% are males

**83% have a HHI of $30K+**
- < $30K: 17%
- $30K-$74K: 42%
- $75K+: 41%

**Majority are employed**
- Employed: 73%
- 27%

62% are college graduates

**Primary decision-makers**
- 81 percent are the primary decision-maker for grocery shopping in their household

**About 3 in 5 are married**
58% are married or in a domestic partnership

**63% have a household of 3+**
- 13% have a household size of 1
- 24% have a household size of 2
- 63% have a household size of 3+
- 50% have children in the house

**Most live in suburban/urban areas**
- West: 23%
- Northeast: 24%
- Midwest: 13%
- South: 40%

43% live in the suburbs, while 40% live in urban areas

**Note:** Defining demographics include younger, higher income, employed, households with 3+ members, frequent shoppers, live in suburban/urban areas, shop at natural/specialty chain stores and online retailers.
Defining Attitudes

- Visits the same grocery store
- Takes advantage of curbside or in-store grocery pickup
- Stocks up on groceries to maximize each visit
- Use online grocery services as a go-to

Purchasing Behaviors

Average Grocery Trip Spend: **$135**

Average Grocery Trips Per Month: **5**

Average Time Spent Per Grocery Trip:

- < 30 mins.: **47%**
- 30 - 44 mins.: **35%**
- 45+ mins.: **18%**

Days for Purchasing Groceries

- Weekday (5%)
- Weekend (26%)
- No particular day (49%)

"I always make a list before making a trip to the grocery store"

"I look to cut costs whenever possible in the grocery store"

Grocery Shopping Habits

Top Methods of Carrying Groceries

- Full-size cart (72%)
- Small cart (10%)

Typical Grocery Shopping Locations

- Mainstream grocery chain (56%)
- Mass merchandiser (46%)
- Online retailer (29%)
- Dollar store (19%)
- Online grocery or delivery service (16%)

Share of Monthly Grocery Shopping

- Curbside or pickup: **26%**
- Delivery service/app: **23%**
- Other: **9%**

Physical store: **42%**

SEGMENT 2

Anti-Shoppers

n=94 (8%)
Demographics: Anti-Shoppers

Most are Baby Boomers or Gen X
- Traditionalists (4%)
- Baby Boomers (39%)
- Gen X (33%)
- Millennials (20%)
- Gen Z (4%)

7 in 10 are female

70% have an income of $74K or less
- < $30K: 36%
- $30K-$74K: 34%
- $75K+: 30%

Majority are not employed
- Not employed: 58%
- 54% are college graduates

Most live in suburban areas
- West: 20%
- Northeast: 19%
- Midwest: 20%
- South: 41%

Note: Defining demographics include infrequent shoppers, quick shoppers, female-skewed, avoid in-store use online delivery/curbside, and Gen X/Baby Boomers.
**Simple Pleasure Seekers**

*SEGMENT 3*

**n=162 (15%)**

**Defining Attitudes**

- Visits the same grocery store
- Gets in and out of grocery stores as quickly as possible
- Finds all the groceries they need at one store
- Throws some junk food and desserts in their grocery cart

**Purchasing Behaviors**

- Average Grocery Trip Spend: **$137**
- Average Grocery Trips Per Month: **8**
- Average Time Spent Per Grocery Trip:
  - < 30 mins. 34%
  - 30 - 44 mins. 38%
  - 45+ mins. 28%

**Days for Purchasing Groceries**

- Weekday (27%)
- Weekend (22%)
- No particular day (51%)

**Typical Grocery Shopping Locations**

- Mass merchandiser (62%)
- Mainstream grocery chain (54%)
- Dollar store (25%)
- Local independent grocery (22%)
- Club store (16%)

**Grocery Shopping Habits**

- “I decide what to buy as I walk through the grocery aisles”
- “I look to cut costs whenever possible in the grocery store”

**Top Methods of Carrying Groceries**

- Full-size cart (76%)
- Small cart (9%)

**Share of Monthly Grocery Shopping**

- Curbside or pickup: **2%**
- Delivery service/app: **11%**
- Other: **3%**
- Physical store: **84%**

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Demographics: Simple Pleasure Seekers

1 in 3 are a Baby Boomer
- Traditionalists (8%)
- Baby Boomers (33%)
- Gen X (23%)
- Millennials (26%)
- Gen Z (10%)

Slight majority are female
- 53% are females
- 46% are males

84% have an income of $74K or less
- < $30K: 40%
- $30K-$74K: 44%
- $75K+: 16%

Majority are not employed
- 67% are non-college graduates
- 43% are employed

Primary decision-makers
- 73 percent are the primary decision-maker for grocery shopping in their household
- 60% are not married or in a domestic partnership

3 in 5 are not married
- 26% have a household size of 1
- 39% have a household size of 2
- 35% have a household size of 3 +
- 79% have no children in the house

74% have a household of 2+

Many live in suburban areas
- West: 16%
- Northeast: 17%
- Midwest: 24%
- South: 43%
- 45% live in the suburbs

Note: Defining demographics include lower income, less education, less marriages, not as good health, and shops any day of the week.

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Defining Attitudes
- Always makes a list before going to the grocery store
- Cooks homemade meals more than often than not
- Visits the same grocery store
- Enjoys preparing their own food

Purchasing Behaviors
- Average Grocery Trip Spend: $125
- Average Grocery Trips Per Month: 5
- Average Time Spent Per Grocery Trip:
  - < 30 mins.: 39%
  - 30 - 44 mins.: 37%
  - 45+ mins.: 24%
- Days for Purchasing Groceries:
  - Weekday (35%)
  - Weekend (23%)
  - No particular day (42%)

"I look to cut costs whenever possible in the grocery store"

Grocery Shopping Habits
- Top Methods of Carrying Groceries:
  - Full-size cart (73%)
  - Small cart (14%)
- Typical Grocery Shopping Locations:
  - Mainstream grocery chain (70%)
  - Mass merchandiser (47%)
  - Club store (24%)
  - Natural/specialty grocery chain (20%)
  - Local independent grocery (18%)

Share of Monthly Grocery Shopping:
- Physical store: 82%
- Delivery service/app: 12%
- Curbside or pickup: 4%
- Other: 2%

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### Demographics: Seasoned Planners

**Majority are Baby Boomers**
- Traditionalists (11%)
- Baby Boomers (55%)
- Gen X (18%)
- Millennials (13%)
- Gen Z (3%)

**Over 2 in 3 are female**
- 64% are females while 36% are males

**70% have an income of $74K or less**
- < $30K: 32%
- $30K-$74K: 40%
- $75K+: 28%

**Majority are not employed**
- 31% are not employed
- 52% are college graduates

**Primary decision-makers**
- 70 percent are the primary decision-maker for grocery shopping in their household

**About 3 in 5 are married**
- 56% are married or in a domestic partnership

**Most have 2 HH members**
- 23% have a household size of 1
- 56% have a household size of 2
- 21% have a household size of 3+
- 89% have no children in the house

**1 in 2 live in suburban areas**
- 51% live in the suburbs

**Note:** Defining demographics include older, not employed, no children in household, 2 HH members, lower spend, and mainstream chain shoppers.

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Defining Attitudes

- Always makes a list before going to the grocery store
- Enjoys preparing their own food
- Visits the same grocery store

Purchasing Behaviors

- Average Grocery Trip Spend: $200
- Average Grocery Trips Per Month: 11
- Average Time Spent Per Grocery Trip
  - < 30 mins: 36%
  - 30 - 44 mins: 39%
  - 45+ mins: 25%

Days for Purchasing Groceries
- Weekday (43%)
- Weekend (39%)
- No particular day (18%)

“I get in and get out of grocery stores as quickly as possible”

Grocery Shopping Habits

- Top Methods of Carrying Groceries
  - Full-size cart (49%)
  - Small cart (21%)

- Typical Grocery Shopping Locations
  - Mass merchandiser (50%)
  - Mainstream grocery chain (38%)
  - Dollar store (27%)
  - Online retailer (27%)
  - Club store (24%)

Share of Monthly Grocery Shopping
- Physical store: 53%
- Delivery service/app: 23%
- Curbside or pickup: 13%
- Other: 11%

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Demographics: Young Spenders

47% are a Millennial
- Traditionalists (1%)
- Baby Boomers (21%)
- Gen X (17%)
- Millennials (47%)
- Gen Z (14%)

Primary decision-makers
- 83 percent are the primary decision-maker for grocery shopping in their household

Slight majority are male
- 52% are males while 47% are females

Most have a HHI of $30K+
- < $30K: 27%
- $30K-$74K: 37%
- $75K+: 36%

66% are employed

Most live in suburban/urban areas
- West: 24%
- Northeast: 15%
- Midwest: 20%
- South: 41%

51% are married or in a domestic partnership
- 20% have a household size of 1
- 29% have a household size of 2
- 51% have a household size of 3+
- 59% have no children in the house

Note: Defining demographics include younger, higher income, employed, more diverse, higher spenders, planned shopping, and non-mainstream chain shoppers.

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**Defining Attitudes**

- **Cooks homemade meals and enjoys preparing their own food**
- **Enjoys grocery shopping with family, friends, or a partner**
- **Visits the same grocery store and always makes a list before**
- **Doesn’t mind running to the store for a few groceries**
- **Takes the time to compare grocery items**

**Purchasing Behaviors**

- **Average Grocery Trip Spend:** $162
- **Average Grocery Trips Per Month:** 8
- **Average Time Spent Per Grocery Trip**
  - < 30 mins.: 20%
  - 30 - 44 mins.: 31%
  - 45+ mins.: 49%

**Days for Purchasing Groceries**

- Weekday (26%)
- Weekend (38%)
- No particular day (36%)

**Grocery Shopping Habits**

- **Top Methods of Carrying Groceries**
  - Full-size cart (82%)
  - Small cart (5%)

- **Typical Grocery Shopping Locations**
  - Mass merchandiser (63%)
  - Mainstream grocery chain (57%)
  - Club store (25%)
  - Local independent grocery (23%)
  - Dollar store (23%)

**Share of Monthly Grocery Shopping**

- Physical store: 77%
- Curbside or pickup: 6%
- Delivery service/app: 13%
- Other: 4%

**n=150 (14%)**
Demographics: Grocery Enthusiasts

2 in 5 are a Baby Boomer
- Traditionalists (1%)
- Baby Boomers (38%)
- Gen X (20%)
- Millennials (32%)
- Gen Z (9%)

About 3 in 5 are female
- 58% are females while 42% are males

46% have a HHI of $30K–$74K
- 32% < $30K
- 46% $30K–$74K
- 22% $75K+

Over half are not employed
- Not employed 54%
- 67% are non-college graduates

Primary decision-makers
- 61 percent are the primary decision-maker for grocery shopping in their household

1 in 2 are married
- 51% are married or in a domestic partnership

Most have a household of 2+
- 15% have a household size of 1
- 42% have a household size of 2
- 43% have a household size of 3+
- 67% have no children in the house

1 in 2 live in suburban areas
- 22% West
- 11% Northeast
- 26% Midwest
- 41% South

Note: Defining demographics include shared-involvement, 2+ HH Members, slow shoppers, less education, and full-cart shoppers.
Frugal Do-it-Yourselfers  
n=133 (12%)  

Defining Attitudes
- Looks to cut costs whenever possible in the grocery store
- Visits the same grocery store and always makes a list before
- Cooks homemade meals and enjoys preparing their own food
- Views store or discount brands as good as premium brands
- Takes the time to compare grocery items

Purchasing Behaviors
- Average Grocery Trip Spend: $116  
- Average Grocery Trips Per Month: 6  
- Average Time Spent Per Grocery Trip
  - < 30 mins. (38%)
  - 30 - 44 mins. (36%)
  - 45+ mins. (26%)
- Days for Purchasing Groceries
  - Weekday (29%)
  - Weekend (24%)
  - No particular day (47%)

Grocery Shopping Habits
- Top Methods of Carrying Groceries
  - Full-size cart (78%)
  - Small cart (11%)
- Typical Grocery Shopping Locations
  - Mainstream grocery chain (70%)
  - Mass merchandiser (59%)
  - Local independent grocery (23%)
  - Dollar store (21%)
  - Club store (21%)

Share of Monthly Grocery Shopping
- Curbside or pickup: 2%
- Delivery service/app: 10%
- Other: 1%
- Physical store: 87%

“I don’t trust other people to pick out my groceries”  
“I’m not interested in using online grocery services”
Demographics: Frugal Do-it-Yourselfers

Nearly 1 in 2 are a Baby Boomer

- Traditionalists (9%)
- Baby Boomers (47%)
- Gen X (22%)
- Millennials (20%)
- Gen Z (2%)

Over 1 in 2 are female

54% are females while 46% are males

78% have a HHI of $74K or less

- $<30K (35%)
- $30K-$74K (43%)
- $75K+ (22%)

Majority are not employed

- Not employed (57%)
- Employed (43%)

59% are non-college graduates

Primary decision-makers

- 82 percent are the primary decision-maker for grocery shopping in their household

Slight majority are not married

53% are not married or in a domestic partnership

71% have a household of 2 or less

- 34% have a household size of 1
- 37% have a household size of 2
- 29% have a household size of 3+

- 81% have no children in the house

Over half live in the suburbs

- West 22%
- Northeast 18%
- Midwest 26%
- South 34%

- 57% live in the suburbs

Note: Defining demographics include older, lower spenders, mainstream chain shoppers, less diverse, and suburban/rural skew.
Summary of Shopper Profiles

1. Health-Conscious Families
   - Organic, plant-based, healthy food preference
   - Cooks at home
   - Tech-savvy
   - Less price sensitive
   - Younger and employed
   - Higher income
   - 3+ HH members
   - Frequent shoppers
   - Urban/suburban skew
   - Natural/specialty chain AND online retailer shoppers

2. Anti-Shoppers
   - Grocery delivery or curbside pickup users
   - Visits same store
   - Infrequent Shoppers
   - Quick Shoppers
   - Female-skewed
   - Avoid In-Store
   - Gen X/Baby Boomers

3. Simple Pleasure Seekers
   - Visits same store
   - Gets in and out
   - Buys junk food/desserts
   - Cost conscious
   - Lower income
   - Less education
   - Less marriages
   - Not as good health
   - Shops any day of week

4. Seasoned Planners
   - Makes a shopping list
   - Cooks at home
   - Visits same store
   - Older
   - Not employed
   - No children in household
   - 2 HH members
   - Lower spenders
   - Mainstream chain shoppers

5. Young Spenders
   - Enjoys preparing own food
   - Makes a shopping list
   - Gets in and out
   - Visits same store
   - Younger and employed
   - Higher income
   - More diverse
   - Higher spenders
   - Non-mainstream chain shoppers

6. Grocery Enthusiasts
   - Cooks at home
   - Enjoys grocery shopping
   - Buys junk food/desserts
   - Takes time at store to look at options
   - Shared-involvement
   - 2+ HH members
   - Slow shoppers
   - Less education
   - Full-cart shoppers

7. Frugal DIYers
   - Cuts costs whenever possible
   - Takes time at store to look at options
   - Doesn’t trust others to pick groceries
   - Likes store/discount brands
   - Cooks at home
   - Older
   - Lower spender
   - Mainstream chain shoppers
   - Less diverse
   - Suburban/rural skew
Demographics: Total Sample

**Generation**
- Traditionalists (5%)
- Baby Boomers (35%)
- Gen X (21%)
- Millennials (30%)
- Gen Z (9%)

**Gender**
- 55% are females while 44% are males

**Household Income**
- < $30K: 31%
- $30K-$74K: 41%
- $75K+: 28%

**Employment/Education**
- 44% are college graduates
- Not employed: 50%
- Employed: 50%

**Primary decision-makers**
- 76 percent are the primary decision-maker for grocery shopping in their household

**Marital Status**
- 50% are not married or in a domestic partnership

**Household Size**
- 23% have a household size of 1
- 38% have a household size of 2
- 39% have a household size of 3 +
- 29% have children in the house

**Region/Setting**
- West: 21%
- Northeast: 17%
- Midwest: 22%
- South: 40%
- 46% live in the suburbs
Grocery Statements for Segmentation

A MaxDiff exercise including the following 50 statements was used as the primary input for grocery shopper segmentation. Each statement reflects a key relevant grocery shopper attitude, behavior, feeling, or belief.

- I look forward to grocery shopping
- Grocery shopping is a burden
- Wearing a mask discourages me from grocery shopping in person
- Mandatory masks make me feel more comfortable grocery shopping in person
- I enjoy preparing my own food
- I prefer a meal kit subscription over grocery shopping
- COVID-19 has made me feel more at risk in grocery stores
- I never felt less safe grocery shopping during the pandemic
- I'm more likely to visit a grocery store with extensive sanitization procedures
- Intensive cleaning in grocery stores discourages me from going
- I can find all the groceries I need at one store
- I need to visit multiple stores to get all of my groceries
- I get in and get out of grocery stores as quickly as possible
- I take the time to look at grocery items and compare options
- Organic and natural foods are my first choice
- I go out of my way to purchase healthy grocery items
- I'm one to always throw some junk food and desserts in my grocery cart
- I'm interested in new plant-based food alternatives
- I consider the social responsibility of grocery items when shopping
- I'm one to try temporary diets
- Religious or cultural beliefs influence the groceries I buy
- I tend to seek groceries that are low in sugar, sodium, fat, or carbs
- I like to purchase grab & go prepared foods at the grocery store
- Online grocery delivery services are my go-to
- I'm not interested in using online grocery services
- I consider myself to be tech-savvy
- I am lost when it comes to technology and apps
- I don't trust other people to pick out my groceries
- I'm willing to pay someone else to do my grocery shopping
- Brand names are important to me for groceries
- Store or discount brands are as good as premium brands
- I cook homemade meals more than often than not
- I'm happy to let someone else pick up groceries on my list
- I stock up on groceries to maximize each visit
- I don't mind running to the store for a few groceries
- I always make a list before making a trip to the grocery store
- I decide what to buy as I walk through the grocery aisles
- I tend to visit the same grocery store
- I often switch up where I get my groceries
- I take advantage of curbside or in-store grocery pickup
- I only drive to the grocery store to do the shopping myself
- Grocery shopping is best as a solo activity
- I enjoy grocery shopping with my family, friends, or partner
- I'm fine spending more money on groceries I want
- I look to cut costs whenever possible in the grocery store
- I make an effort to buy only essential groceries
- The more variety of groceries I buy, the better
- I typically use the self-checkout
- I enjoy checking out and interacting with a cashier
- I frequently order takeout or delivery from restaurants

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How Drive Research Can Help

As the battle for market share continues to grow, grocery and retail brands are turning to market research to understand what draws customers to the stores they love.

As a full-service market research company, our team offers a wide array of quantitative and qualitative studies. We specialize in insights and consumer behavior analysis that allow your organization to quickly adjust to the latest and greatest shopping trends.

Whether Drive Research executes a survey, focus group, or mystery shop - you will receive the quality, actionable data needed to become consumers' store of choice.

Experience the Drive Research difference:

Request a Consultation    See Our Services