

**IN**  
**WHAT**  
**DO THEY**  
**TRUST?**

Part two of *WGB's* and BrandSpark's national benchmark study reveals the most influential in-store attributes for consumers—and the leading retailers that best fulfill them.

By Meg Major

Illustrations by Holly Wales



While the spate of developments over the past 20 months have given rise to a new retail food world, the majority of consumers remain heavily invested in their food and household purchases—as well as the retailers for which they most frequently turn to fulfill their needs. And though the grocery sector remains relatively unaffected—for now—by the uptick of online competition, the onus is squarely upon retailers to discern and deliver the goods and

services deemed most important by a diverse and increasingly demanding consumer.

To that end, part two of *Winsight Grocery Business*' and BrandSpark International's Most Trusted Food Retailers exclusive research dissects the foremost factors that are most profoundly informing consumer perceptions of preferred grocers, alongside a comparative ranking of the factors found to be most influential for imparting loyalty and a satisfying shopping experience.

An assessment of the top 21 most important attributes offered by food retailers depicts very few surprises. The usual suspects—price, value, fresh produce, fresh meat and location—are all viewed as significant among 70% of the national panel of 2,488. Conversely, the attributes that were plotted as less important must-haves—such as specialty foods, digital media, pharmacy and curbside pick-up—believe the priority many retailers are ascribing to

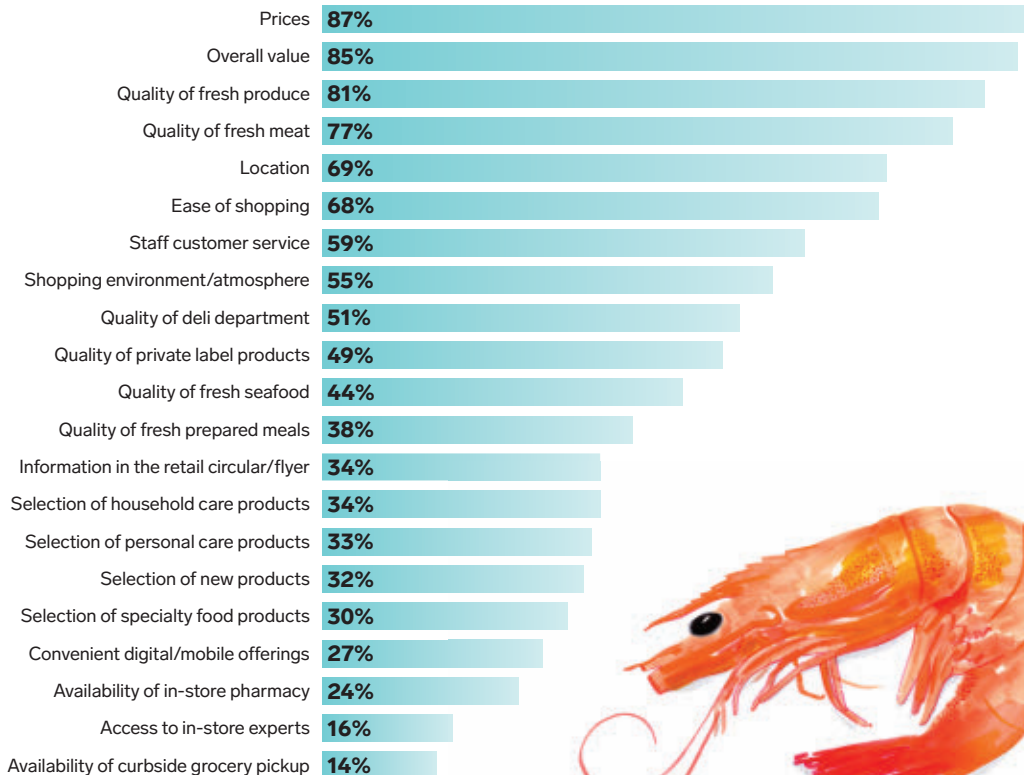
those very same areas.

While fresh produce and meat flip-flop as the first and second most influential departments in the clear majority of industry studies, the former held sway as the most important in-store attraction for six out of every 10 visits to a food store in the first-ever national survey identifying America's Most Trusted Food Retailers. The same percentage of consumers (six in 10) professed a willingness to pay more for top-quality produce, while eight in 10 agreed, "It is a must that a grocery retailer have a good selection of fresh produce year-round."

The 15 retailers which scored highest for their "core fresh" produce and meat quality credentials are Wegmans, Whole Foods Market, Publix, H-E-B, Giant Eagle, Kroger, Sprouts Farmers Markets, Stop & Shop, Price Chopper, Harris Teeter, The Fresh Market, ShopRite, Hy-Vee, Meijer and Trader Joe's.

## Grocery Store Attribute Importance

When asked to rate the importance of various features when choosing a grocery store, shoppers are most likely to cite price as very important, while fresh produce and meat are the next two top attributes.



### Methodology

Respondents for the Most Trusted U.S. Food Retailers' research study were recruited via email to an online survey in September 2017. The study was conducted in conjunction with the BrandSpark Most Trusted Retailers study, 2017 edition.

Respondents were garnered from a national panel representing residents of the United States over the age of 18 who participate in grocery shopping for their household. The sample of 2,488 respondents is nationally representative by age, gender, census region and income level. The final weighted sample is 68% women and 32% men.

Insights for the Most Trusted U.S. Food Retailers' research was conducted by BrandSpark International, which combines real-world consumer and shopper insights with marketing credentials and services. BrandSpark Research focuses on insights that decode the shopper mindset, specializing in understanding their retail and e-commerce experiences. BrandSpark Marketing Services runs leading CPG awards programs Best New Product Awards and BrandSpark Most Trusted Awards as well as consumer product trial and amplification platform Shopper Army.

For more information, visit [BrandSpark.com](http://BrandSpark.com)

# Fresh Satisfaction Leaders

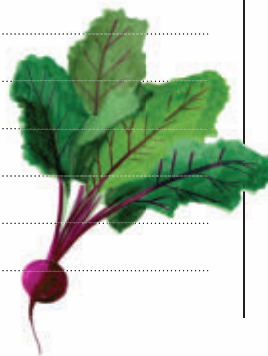
Leading brick-and-mortar retailers' fresh departments continue to define the underpinnings of their overall brand and destination offerings for shoppers, who equate the top-performing retailers below with excellence in seafood, deli and prepared foods.



In What Do They Trust data is the second of a three-part series of exclusive BrandSpark research conducted for WGB. Part one exploring the Most Trusted U.S. Food Retailers appeared in WGB's November 2017 issue. Up next in part three: grocery e-commerce and the various attributes shoppers place when shopping online for food/groceries.



	Quality of fresh seafood	Quality of deli department	Quality of fresh-prepared meals
Wegmans	1	1	1
Whole Foods Market	2	6	2
Publix	3	2	5
H-E-B Grocery	6	3	3
Giant Eagle	4	5	4
Kroger	9	7	11
Sprouts Farmers Markets	10	16	12
Stop & Shop	8	4	13
Price Chopper	19	10	9
Harris Teeter	5	12	7
The Fresh Market	7	14	10
ShopRite	11	8	15
Hy-Vee	13	13	8
Meijer	15	11	17
Trader Joe's	18	22	6
Giant Food	12	9	14
Safeway	14	15	16
Food Lion	21	20	21
WinCo	16	17	20
Albertsons	17	18	19
Winn-Dixie	20	24	18
Ralph's	23	19	22
Shop 'N Save	22	23	23
IGA	28	21	25
Walmart	26	25	24
Smart & Final	24	26	27
Aldi	27	29	28
Save-A-Lot	30	28	29
Target	25	27	26
Grocery Outlet	29	30	30



## Satisfaction Leaders—Core Fresh

While the fresh departments remain ground zero for retailers to leverage their quality, differentiation and specialization, those earning the highest marks for their overall fresh finesse include:

	Quality of fresh produce	Quality of fresh meat
Wegmans	1	1
Whole Foods Market	2	3
Publix	4	2
H-E-B Grocery	5	4
Giant Eagle	6	5
Kroger	11	9
Sprouts Farmers Markets	3	7
Stop & Shop	13	11
Price Chopper	9	6
Harris Teeter	18	16
The Fresh Market	19	8
ShopRite	15	14
Hy-Vee	14	15
Meijer	8	13
Trader Joe's	7	12
Giant Food	12	21
Safeway	16	18
Food Lion	10	10
WinCo	20	17
Albertsons	21	20
Winn-Dixie	23	19
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Shop 'N Save	24	26
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Walmart	27	28
Smart & Final	28	25
Aldi	22	27
Save-A-Lot	26	22
Target	29	29
Grocery Outlet	30	30



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\*IRI 52 wks ended 9/3/2017 US Multi Outlet



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# Private Label Satisfaction Leaders

These retailers have earned strong reputations for private label products, which continue to help them solidify their brand and image.

- 1 Wegmans
- 2 Trader Joe's
- 3 Publix
- 4 Whole Foods Market
- 5 Kroger
- 6 H-E-B Grocery
- 7 Food Lion
- 8 Giant Eagle
- 9 Stop & Shop
- 10 Meijer
- 11 Giant Food
- 12 Aldi
- 13 ShopRite
- 14 Price Chopper
- 15 Target
- 16 Sprouts Farmers Markets
- 17 Walmart
- 18 Hy-Vee
- 19 Safeway
- 20 Winn-Dixie
- 21 Albertsons
- 22 WinCo
- 23 Smart & Final
- 24 Ralph's
- 25 Save-A-Lot
- 26 Harris Teeter
- 27 The Fresh Market
- 28 Shop 'N Save
- 29 Grocery Outlet
- 30 IGA



## Convenience and Atmosphere Satisfaction Leaders

While shoppers remain fixated on low prices and proximity/location as the most desired traits of a preferred retailer, the overall shopping environment and ease of shopping continue to factor as foremost reasons for the selection of a primary store, where Publix, Food Lion, Stop & Shop, H-E-B, Kroger and Wegmans rate high.

	Shopping environment / atmosphere	Staff customer service	Ease of shopping	Location
Publix	1	2	1	2
Food Lion	7	9	2	1
Stop & Shop	12	13	3	3
H-E-B Grocery	11	5	4	13
Kroger	16	7	9	8
Wegmans	2	6	11	28
Grocery Outlet	17	10	10	11
Meijer	15	12	6	15
Target	5	20	5	18
Trader Joe's	4	1	14	30
Winn-Dixie	25	15	7	6
Giant Eagle	10	21	18	5
Whole Foods Market	3	4	20	27
Sprouts Farmers Markets	9	8	13	26
Giant Food	13	22	16	9
Hy-Vee	14	3	23	23
Smart & Final	27	18	8	14
Harris Teeter	8	14	27	21
The Fresh Market	6	11	24	29
Price Chopper	23	23	17	10
Safeway	18	24	28	4
Aldi	24	16	21	17
ShopRite	19	25	15	19
Save-A-Lot	28	27	12	12
IGA	26	17	22	16
WinCo	20	19	19	24
Ralph's	21	29	25	20
Walmart	30	30	29	7
Albertsons	22	26	30	25
Shop 'N Save	29	28	26	22



Fewer than **1 in 10** shoppers say they never buy private label.



**6 in 10** shoppers believe that private label products are often from the same manufacturers as the brand names.



**7 in 10** shoppers "usually" buy at least a few private label products on their shopping trips.



Shoppers continue to see private labels as a way to get more value for money: **1 in 2** say they are "just as good" as brand names.



## Price and Value Satisfaction Leaders

With grocery purchases representing 12.6% of an average household income, it's no surprise that price and value—as the most practical and emotional attributes for food shoppers—remain indelible factors when sizing up preferred food stores.

	Info in the retail circular/flyer	Prices	Overall value
WinCo	29	2	1
Aldi	18	1	2
Grocery Outlet	24	4	3
H-E-B Grocery	17	5	4
Save-A-Lot	21	3	5
Walmart	28	7	6
Food Lion	8	9	7
ShopRite	6	8	8
Trader Joe's	22	10	9
Smart & Final	25	6	10
Kroger	4	12	11
Publix	1	22	12
Stop & Shop	12	17	13
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Giant Eagle	2	28	26
Albertsons	20	23	27
Whole Foods Market	26	30	28
Harris Teeter	19	27	29
The Fresh Market	30	29	30

## The preferred store for household and personal care products:

7 in 10 regularly buy at mass merchants

1 in 2 regularly buy at supermarkets



## Household and Personal Care Satisfaction Leaders

Mass merchants and supermarkets remain the primary outlets for these products; one in three shoppers cite "getting everything I need in one stop" as a top reason for their preferred store.

	Selection of household care products	Selection of personal care products
Walmart	1	2
Target	2	1
Meijer	3	3
ShopRite	4	5
Wegmans	5	4
H-E-B Grocery	6	6
Giant Eagle	7	11
Publix	8	8
Giant Food	9	7
Kroger	10	10
Price Chopper	11	12
Stop & Shop	12	9
Food Lion	13	14
WinCo	14	17
Winn-Dixie	15	15
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