Consumer survey 2024

Deloitte Retail Sector

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Summary

Each year, Deloitte commissions research agency Flycatcher to conduct a survey to gain insight into supermarket consumer trends, particularly trends involving product range, spending, diversification, future of food, innovation and development. The survey also explores new trends such as self-scanning, online ordering and ready-to-eat products. And since last year, the survey also includes the 'Super Supermarkt Keurmerk' (SSK)

A total of 2,261 respondents aged 18 and over who regularly visit a supermarket have taken part in the survey.

Grocery shopping

Nearly all Dutch people visit a supermarket at least once a week (93%), averaging 2-3 times a week. The majority always do their grocery shopping in a physical supermarket (78%), but this percentage is decreasing compared to 2023 and 2022 (80%). 19% of respondents use both a physical supermarket and an online supermarket. The percentage of respondents who only do their shopping online remained constant at 3% over the last three years.

Almost one-fifth of respondents who do both physical and online grocery shopping visit the same (online) supermarket. Over one-third sometimes do their grocery shopping online in the same supermarket as their physical shopping and other times not; and 44% of respondents do their online grocery shopping in another supermarket. As shown in Figure 1, cost is the main reason for choosing a different online supermarket. For one group of respondents, their own physical supermarket does not offer online groceries. In addition, 23% indicate that the products they buy online are not available in their own supermarket.

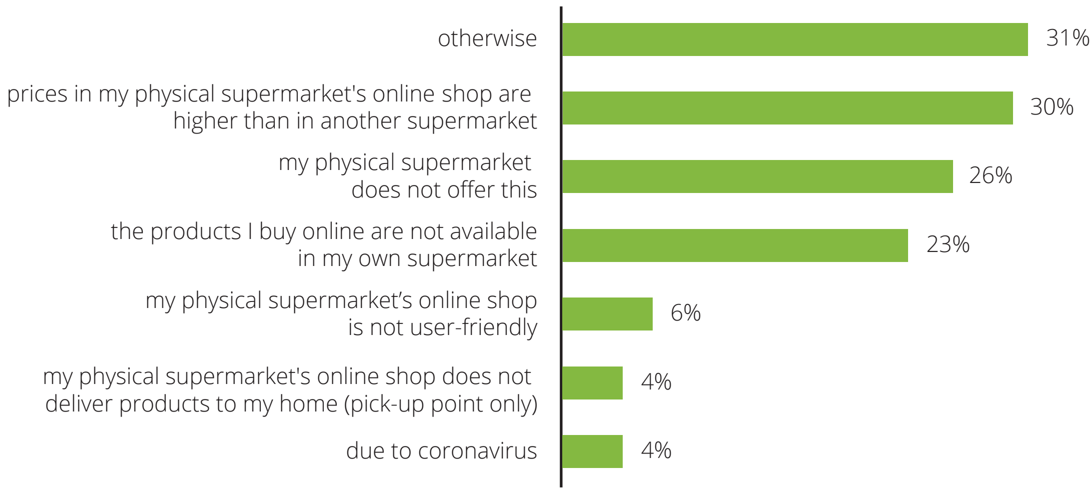

Figure 1: Why do you (sometimes) do your online grocery shopping in another supermarket than your physical shopping?

Overall (including both physical and online shoppers), two-fifths of respondents think grocery shopping is (great) fun, while over one-tenth do not like it (at all). 45% of respondents (very much) enjoy grocery shopping in a physical supermarket is (great) fun, for online supermarkets this is 22%.

Over two-fifths of respondents use a digital or paper leaflet for weekly shopping at least once a week (45% and 47%, respectively). The use of digital leaflets has increased significantly compared to 2022. An attractive offer in a (digital) weekly leaflet is a reason to visit another supermarket for almost a quarter of respondents—also quite a substantial increase compared to 2022. Four-fifths of respondents (80%) check things out before they go shopping, particularly by thumbing through supermarket leaflets (59%). Compared to 2022, more and more respondents use an app to get acquainted with the offer before shopping (20% versus 23%).

Self-scanning

88% of respondents say their supermarket offers self-scan check-out. This is a significant increase from 83% in 2022. Consumer use of self-scan services has also increased: like in 2023, 81% of respondents now use self-scanning methods compared to 74% in 2022. They mainly use self-scan checkout (76%) and a self-scanning device (57%). The use of self-scan checkout has increased to 76% from 69% in 2022, while the use of a self-scanning device dropped from 64% to 57% since 2022. Respondents who do not use self-scanning methods mainly do not do so because they prefer to have contact with a cashier (53%) or because they prefer to pay in cash (39%).

Almost one-tenth of respondents say they sometimes come home and realise they forgot to scan some of the products while 2% admits to deliberately not scanning products sometimes. Half of the latter group say they deliberately do not scan products as often as they did a year ago, while two-fifths say they do so less often now. About three-fifths suspect others to sometimes forget to scan products (59%) or deliberately fail to scan products (64%). An overwhelming majority (90%) is okay with groceries being checked at self-scanning checkouts. Just under a fifth (18%) finds this annoying and 15% feel they are being singled out for checks every time.

Ordering groceries online

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

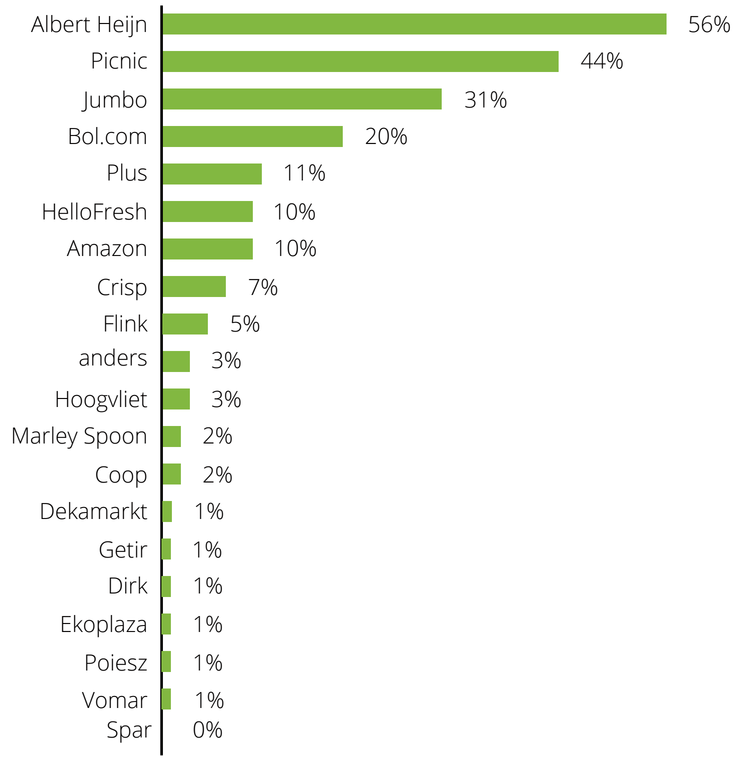

Figure 2: From which online supermarket(s) have you ever ordered products?

A vast majority (94%) of respondents who order groceries online prefer to have them delivered to their homes. Respondents who shop both online and in a physical shop buy about 53% of total groceries in a physical shop and about 47% online. Soft drinks and laundry/cleaning products are most often bought online, while fruit and vegetables, meat and fish, bread, dairy, snacks and alcoholic drinks are most often bought in a physical shop. Respondents who do both physical and online shopping mostly visit Albert Heijn (79%), Lidl (58%) and Jumbo (56%) as physical shops.

The main reasons why a group of respondents never order online are that the supermarket is close to their homes (58%), that shopping in a physical supermarket is more fun (47%), that people want to look at the products first (44%) and that they do not want to pay extra for delivery costs (35%). Compared to 2022 and 2023, fewer respondents indicated that the minimum order amount and delivery costs are reasons for not buying online.

Out of all respondents, 14% would like to do their shopping online if their supermarket offers this option, while 86% do not plan to. In addition, 12% plan to do online shopping at another supermarket in the future if their own supermarket does not provide this option.

Almost three quarters of respondents use a supermarket app (73%), which is higher than in 2023 (68%) and 2022 (66%). Supermarket apps are mainly used to check out offers and collect supermarket stamps. Users consult their apps almost as frequently as they did in previous years. 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

Most respondents have few qualms about the sale of alcohol in supermarkets: only 15% believe it should be banned. Yet this number has increased significantly compared to 2022 (12%). Over one-third (35%) of respondents think that alcohol, including wine and beer, should be sold in segregated areas in supermarkets.

Furthermore, 10% of respondents were found to smoke. For at least 9% of respondents, a tobacco shop has opened at their supermarket. Almost all smoker respondents (97%) still visit the same (online) supermarkets regardless of the ban on the sale of smoking products in supermarkets on 1 July 2024. Over a tenth (13%) have quit smoking in the past 12 months or plan to do so, mainly for health reasons. Just over half of respondents have been buying smoking materials at a tobacco shop since 1 July, two-fifths at a shop abroad and three-tenths at a petrol station.

So, far more smokers are buying their smoking materials from a shop abroad: the number almost tripled. Tobacco shops are also visited more often: 57% of respondents do so compared to 46% in 2023.

Local and community involvement

Three-tenths of respondents indicated that their supermarket has strong ties to the local community and one-tenth deliberately visit a shop with local involvement. The local involvement of an online supermarket is less important: 4% indicate local involvement to be a reason for choosing an online supermarket.

Two-fifths of respondents rate the CSR policy of their current physical supermarket as (very) good, while this is 28% for online supermarkets. One-sixth (16%) consciously choose a store that is socially responsible. The number of respondents who do not select their store based on social responsibility has increased significantly: from 36% in 2022 to 41% now. A quarter believe supermarkets should pay more attention to the National Week Without Meat, while 42% disagree. The latter is also significantly higher than in 2023 (38%) and 2022 (36%)

Super Supermarkt Keurmerk

Only 8% of respondents is familiar with the Super Supermarket Keurmerk (SSK) quality mark. Out of this group, one-third of respondents know their supermarket has this quality mark and almost two-thirds did not know.

The SSK label 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 especially important. Sustainable energy and conscious waste reduction were considered less important than in 2023. When asked to rate their own supermarket for the 7 pillars, safe environment scored best with an average of 7.5. Conscious waste reduction scored higher than in 2023.

Future of food

Out of the respondents who eat meat, 43% do so 5 times a week or more, 38% eat meat 3 or 4 times a week and 20% less than 3 times a week. About three-tenths (33%) of all respondents eat less meat than in previous years and 7% eat no meat. In addition, 26% plan to eat less meat next year than this year. The main reasons for not eating meat or eating less meat are animal welfare (58%), health (55%) and ecological footprint reduction (47%).

Out of the respondents who eat fish, 22% do so at least twice a week and 74% eat fish once a week or less often. Over one-tenth (14%) of all respondents eat less fish and 12% eat more fish than in previous years. In addition, 7% want to eat less fish next year than this year and 12% want to eat more fish.

Out of the respondents who eat meat substitutes, 5% eat meat substitutes 5 times a week or more often, 39% do so 2 to 4 times a week and 49% once a week or less often. More than a third (34%) of these respondents started eating more meat substitutes this year and 23% plan to eat more meat substitutes in the coming year.

Sustainability

Sustainability factors are generally important when people buy products from a (web) supermarket. The most important factors are the degree of animal suffering (70%), the degree of human exploitation, the use of pesticides (both 68%) and the amount of waste (64%). The amount of CO2 emissions and water use have become more important compared to 2022.

The extent to which the product is good for one's health is important to 75% of the respondents. Around half of the respondents also (very) much seem to need information on product health (51%), the use of pesticides and the extent of animal suffering (both 49%).

To determine whether a food item is healthy, respondents mainly trust their own knowledge (66%), the product's nutritional values (46%) and the product's calories (36%). In determining whether a product has health benefits, the Nutri-Score is considered more important this year than 2 years ago.

Nutritional supplements

One-third of respondents use dietary supplements daily and 17% use them occasionally. Almost three quarters of respondents who use dietary supplements (73%) used the same amount of dietary supplements this year as in previous years and 17% used more dietary supplements.,

Primary, secondary and tertiary supermarket

Respondents spend on average EUR 124 a week in a (web) supermarket—about EUR 55 per family member. Table 1 shows the division between primary, secondary and tertiary supermarkets.

	total unweighted	total weighted	weighted per family member
average amount spent in primary supermarket	€ 82,40	€ 82,40	€ 36,62
average amount spent in secondary supermarket	€ 31,56	€ 28,12	€ 12,50
average amount spent in tertiary supermarket	€ 20,81	€ 13,05	€ 5,80
total	**€ 134,77**	**€ 123,57**	**€ 54,92**

Table 1: weekly spending

The distribution of spending among primary, secondary and tertiary supermarkets is similar to last year, although spending in the primary, secondary and tertiary supermarkets is significantly higher than in previous years. On average, primary supermarkets are visited twice a week, while secondary and tertiary supermarkets are visited a little over once a week or less. Compared with 2022, secondary supermarkets are visited more often. Albert Heijn is still the most visited supermarket by far (71%), followed by Lidl (44%) and Jumbo (42%).

Over two-thirds of the respondents (69%) use loyalty cards from primary supermarkets, while 48% use them from secondary supermarkets and 39% from tertiary supermarkets. The use of loyalty cards at secondary and tertiary supermarkets has increased significantly since previous years.

Respondents rate their primary (online) supermarket 7.8. Across the board, the rating of the quality aspects is good. Like in past few years, the ratings were slightly lower on some points though. At 8.1, parking facilities are rated best. Key factors determining a person's ties to their primary physical and online supermarket are the distance, known location of the products within the store, and good value for money. At 7%, the number of respondents who switched to another primary physical and online supermarket in the past year is comparable to 2022 and 2023. People mainly switched from Albert Heijn and Jumbo, with the main reasons for switching supermarkets being price (39%), product range (27%) and distance (20%). Compared to last year, price considerations were less decisive for changing supermarkets

Price increases

An overwhelming majority of 83% worries about rising food prices. This is significantly lower than in 2023 (89%) and 2022 (88%). Out of the respondents who say they are concerned about rising prices, 74% have adjusted their buying behaviour. In particular, respondents have adjusted their buying behaviour by buying cheaper products and (more often) buying products on sale.

Quality aspects of supermarkets

Respondents still consider price to be the most important aspect of a good supermarket. The main aspect for customer bonding to a supermarket is the distance from home to the shop. 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, and free 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, 27% take a moped or bicycle and 22% go on foot. The average distance to the supermarket is 2.18 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 70% of the respondents no longer visit the supermarket, with insufficient parking space (47%) or the parking facility being too far away (44%) being mentioned as the main reasons.

Product range

Respondents say the main aspect of a supermarket's product range is a good quality supply of fruit and vegetables (see Figure 3). The top 5 is supplemented by a sufficient supply of products, wide range of fruits and vegetables, good quality house brands, and good quality bread. Compared to 2022, respondents consider ample choice of pre-packed fresh produce, drugstore items, fresh fish, fresh bread after 18:00, sustainable products, regional products and beer and wine less important.

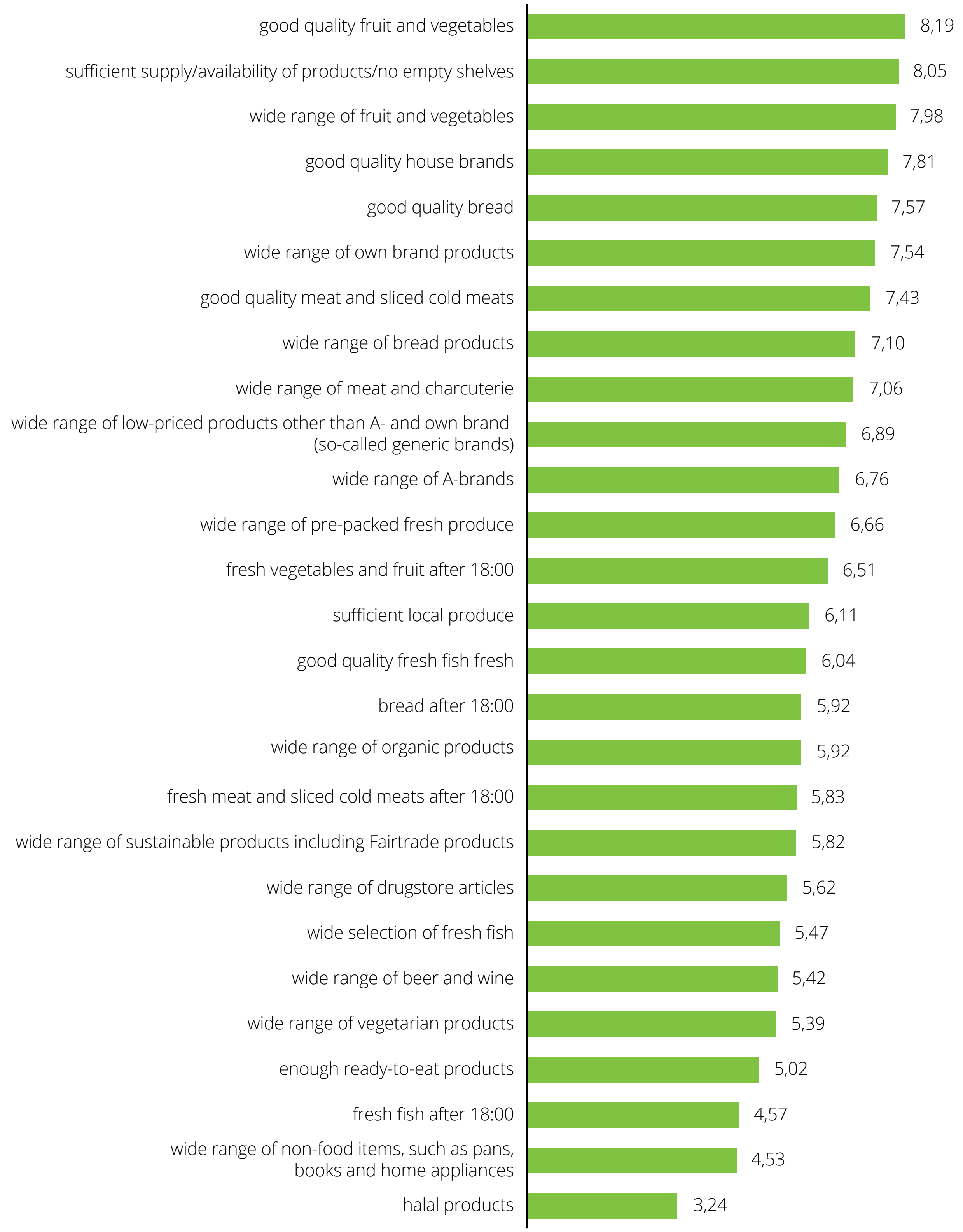

Figure 3: How much importance do you attach to the following aspects of a supermarket's product range? (1 = not important; 10 = extremely important)

A quarter of respondents do not or no longer visit a particular supermarket because of its product range. Aldi (24%), Lidl (13%) and Jumbo (9%) 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 the product range are Albert Heijn (52%), Lidl (23%) and Jumbo (20%).

Diversification

Seven-tenths (70%) of respondents sometimes buy foodstuffs from shops other than supermarkets, especially from specialist shops (35%), at the market (31%), drugstores (26%), and Action (25%), and HEMA (21%). The main reasons for buying foodstuffs from somewhere other than supermarkets are quality, price, and products being unavailable in supermarkets (see figure 4). Spending in shops other than supermarkets amounts to 6.0% of total spending in physical and online supermarkets. Spending on food in a physical supermarket is significantly higher than in 2022, and spending on food elsewhere has also increased compared to 2022 and 2023.

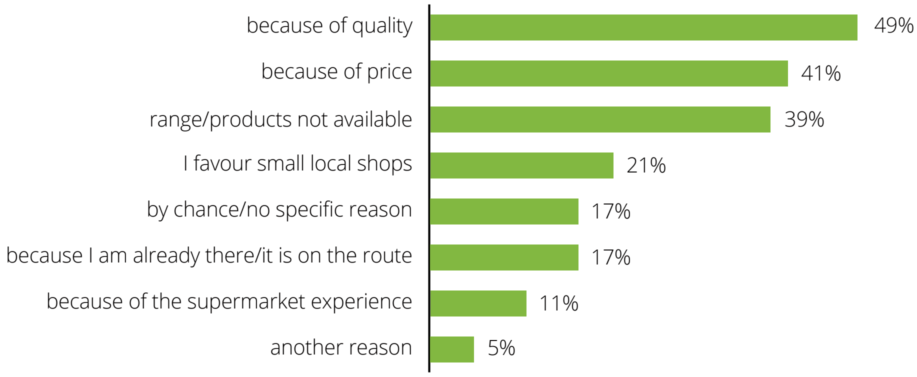

Figure 4: Why don't you buy these foodstuffs in physical and online supermarkets but somewhere else?

Payment method

The number of people who (almost) always pay using PIN/contactless at the supermarket remains roughly the same as in previous years, at 76%. The percentage of people willing to pay exclusively by PIN/contactless if asked to do so has dropped significantly from 68% in 2022 to 64% now. The main reason for not always opting for PIN payment is that people want to decide for themselves how to pay right then and there.

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 comparable to previous years. People buy ready to eat products on average once a week, mostly for dinner and mainly in a physical or online supermarket (63%).

Supermarket experience

The main reasons for respondents to visit a particular supermarket are product availability (68%), loyalty cards (51%) and the range of special products (45%). Since 2022, energy-efficient measures in store construction and design have become a relevant element of customer motivation (27% in 2022, 32% in 2023, and 31% in 2024).

Innovation

Respondents suggest various ways in which primary physical and online supermarkets can improve, such as helping customers economise on spending and make healthier and more sustainable choices. Other respondents, though, do not see the need for improvements. Out of the proposed innovations, respondents consider the option to buy packaging free the most appealing, for 25% of the respondents this is a highly appealing option. This percentage has dropped significantly since 2022 though. The possibility of buying packaging-free would be a reason to switch to another physical or online supermarket for 17% of respondents.

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