



Grocery Delivery for Older Americans

INTERNATIONAL FOOD INFORMATION
COUNCIL FOUNDATION IN COLLABORATION WITH AARP
FOUNDATION

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AARP Foundation
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Background

Technology has transformed American consumer habits, including shopping for food and groceries. Online grocery delivery services, subscription services, and “click and collect” services have streamlined shopping for many, including some older Americans. Although older Americans are less likely than their younger counterparts to shop for food online, shoppers of all generations are discovering the convenience and options available through grocery delivery services.

This research, conducted by the International Food Information Council (IFIC) Foundation and supported by the AARP Foundation, explores how members of the Baby Boomer and Silent generations are utilizing grocery delivery services and the motivators and barriers that prompt or discourage usage.

Methodology

- Online survey of 1,004 Americans ages 50 and older. Fielded June 13 to June 21, 2018. Took an average of 16 minutes to complete.
- An oversample of 223 respondents who have ordered groceries for delivery was also collected to allow for an analysis of 370 consumers who fall in this category.
- The general population results were weighted to ensure that they are reflective of the older American population, as seen in the Census Bureau's 2017 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity, region, and income. Results on those who order groceries for delivery, which includes those collected in the oversample, are not weighted.
- The survey was conducted by Greenwald & Associates, using ResearchNow's consumer panel.

Key Findings

How Consumers Grocery Shop

A wide majority of older Americans grocery shop in-person at supermarkets, super-stores or warehouse/discount clubs for the bulk of their household needs. For most older Americans, stores are easily accessible and shopping for their household needs is easy.

Only about one in six order groceries to be delivered or to be picked up from a store. Older Americans ordering groceries for delivery are likely to be in their 50s, from the Northeast, college-educated, working full-time, and white. Those with mobility issues also appear to be more likely candidates for the service, but this is a distinct consumer segment from those with higher income. Many also say it's uncommon for their family, friends, and neighbors to order groceries.

Half of older Americans use grocery delivery once a month or less. Comparatively, a similar proportion report visiting a any type of grocery store in-person at least once a week.

Key Findings

Issues that Impact Grocery Shopping

Taste, followed by price, are the most impactful factors when shopping for groceries. Compared to all older Americans, those using grocery delivery find healthfulness, brand and environmental sustainability more impactful.

About half of older Americans pay attention to labels related to the sodium, sugar, and fat content. **However, those with groceries delivered are also more apt to pay attention to labels, particularly labels related to how food is produced.**

Older Americans are generally health conscious as they rank a variety of health topics as important. Many older Americans also say these topics impact their shopping habits, especially maintaining a healthy weight and cardiovascular health. **Despite their tendency to be health conscious only three in ten find it easy to maintain a healthy diet and lifestyle.** Older Americans with groceries delivered are also more inclined to cite meal preparation as a challenge and compared to 20 years ago have more difficulty today navigating a store, finding time to go and transportation.

Price is the top shopping obstacle cited for all. **Obstacles such as spoilage, feeling rushed, availability, mobility and transportation are more prevalent among those who have their groceries delivered.**

Key Findings

Experience and Satisfaction of Ordering Groceries

Satisfaction among those ordering groceries is relatively high. In regards to fees and delivery times, gaps exist between the expectations of older Americans and those who already use grocery delivery services. **The share of older Americans ordering groceries who pay added fees is larger than the share willing to pay fees.** Though respondents using delivery services pay more than what older Americans overall are willing to pay, two-thirds say the fees are about what they would expect or less.

Older Americans expect a quick delivery for ordered groceries. Those who have ordered groceries for delivery report longer delivery windows than older Americans overall expect. Half expect ordered groceries to be delivered same day; in reality one-third of those who have had groceries delivered say they arrive next day.

Non-perishables and household staples not for consumption (cleaning and paper products) are the products which are most ordered and most comfortable being ordered.

Despite the interest in labels and packaging information among older Americans ordering their groceries for delivery, **many find it more difficult to identify product and packaging labels when ordering as compared to in-person.**

Key Findings

Motivations and Barriers to Ordering Groceries

Not having to deal with the physical and time constraints of in-person shopping are the top motivators for older Americans to shop online.

Meanwhile, fees, a perceived lack of quality, and the desire to see/touch foods are top barriers to online grocery ordering. Safety concerns about a home delivery are not high.

From finding discounts and preferred brands to reading nutrition labels, few older Americans believe grocery shopping online for delivery is easier than in-person. Though most express skepticism about shopping online, a sizable minority believe it to be easier to stick to a healthy shopping list when shopping online.

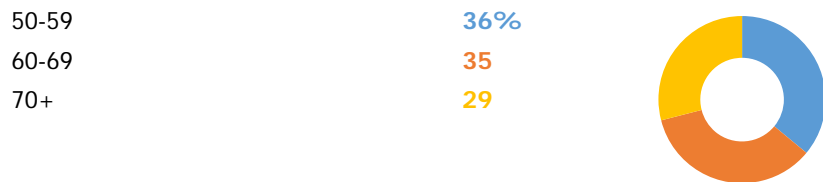
Guaranteeing quality and fair prices are the most likely way potential and current customers would be encouraged to overcome barriers. About two in three older Americans say personally inspected produce, guaranteed delivery time frame, special coupons, and loyalty programs would encourage them to order online. Current customers are especially encouraged by loyalty programs.

Demographics

Gender



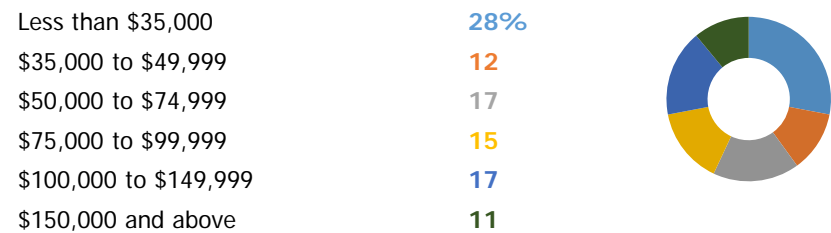
Age



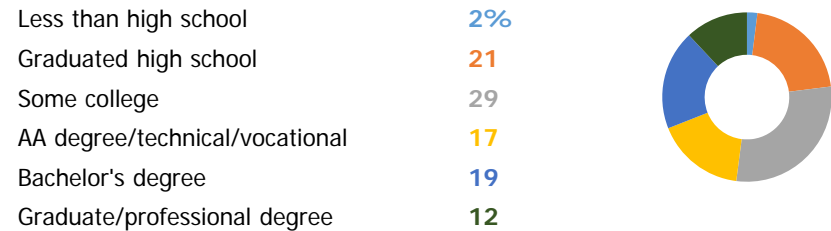
Race/Ethnicity



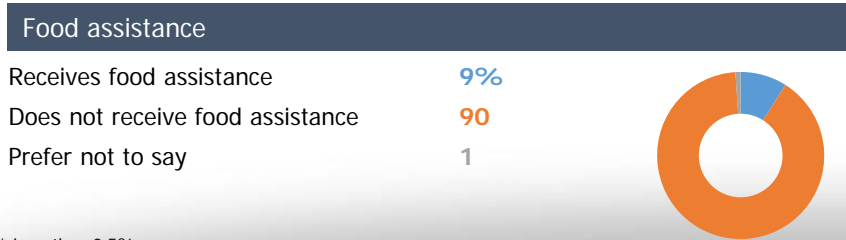
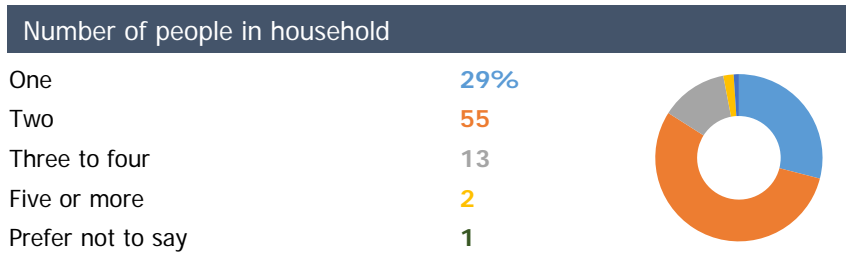
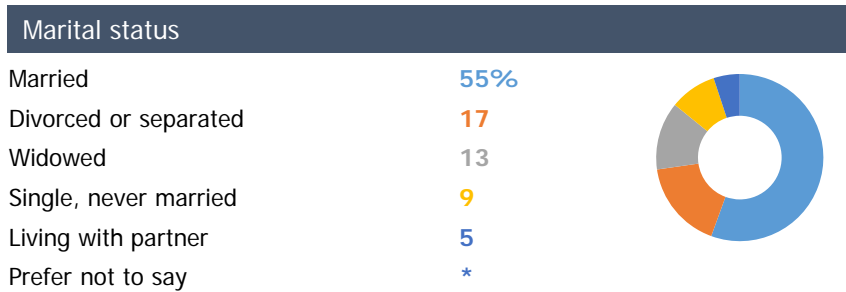
Household Income



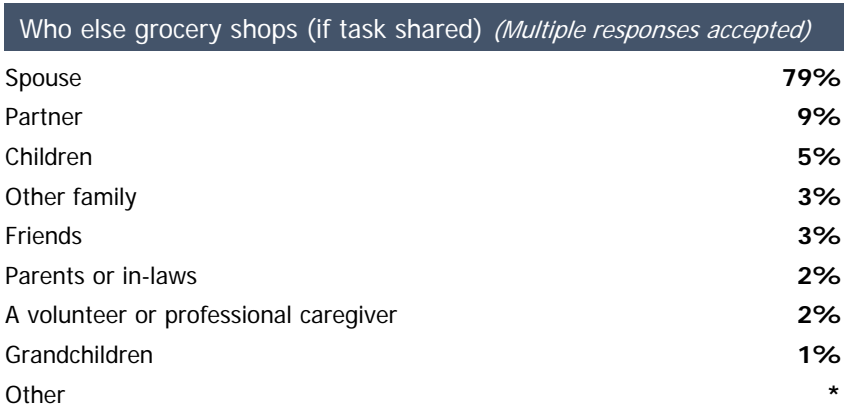
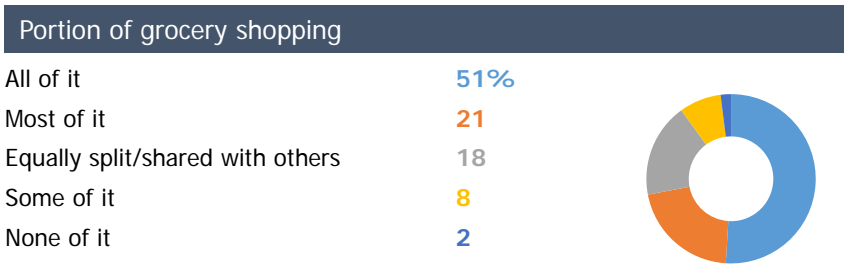
Education



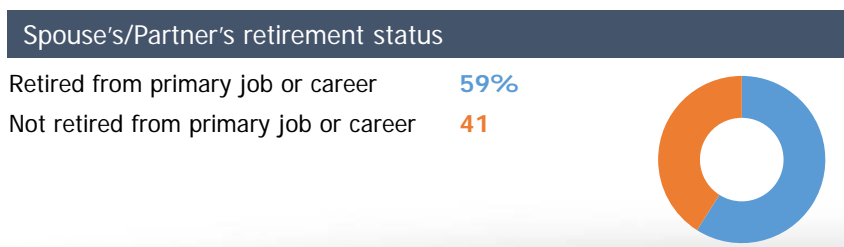
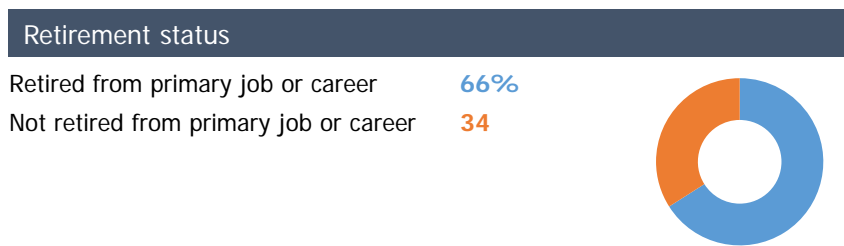
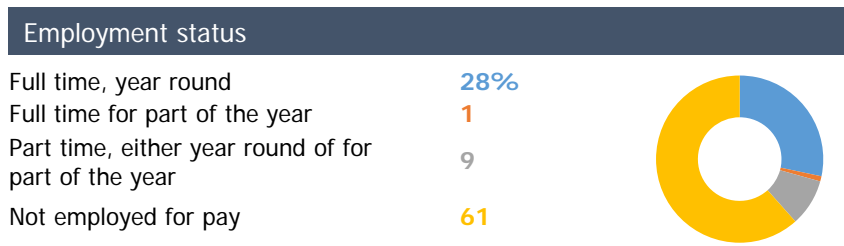
Demographics



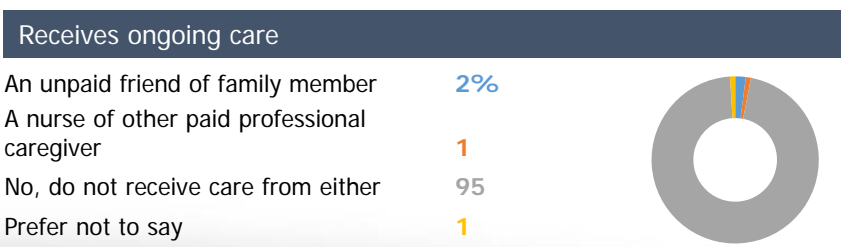
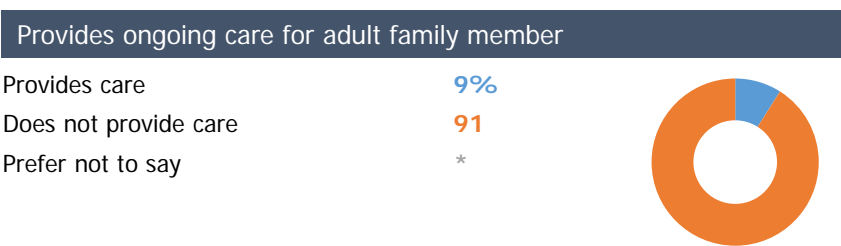
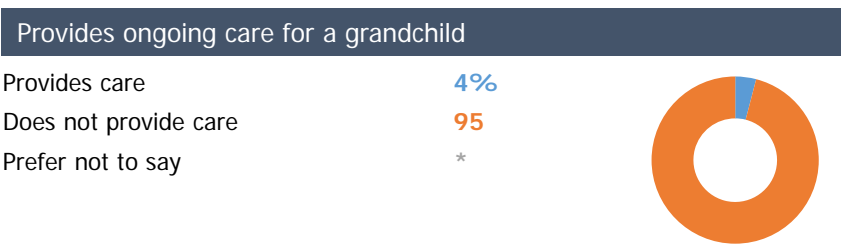
* Less than 0.5%



Demographics

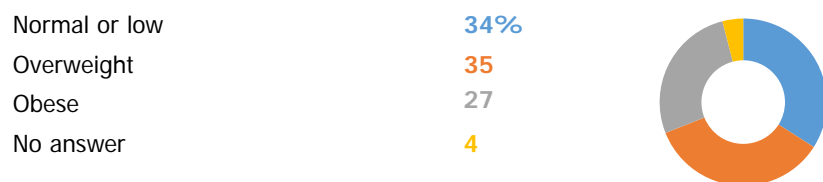


* Less than 0.5%

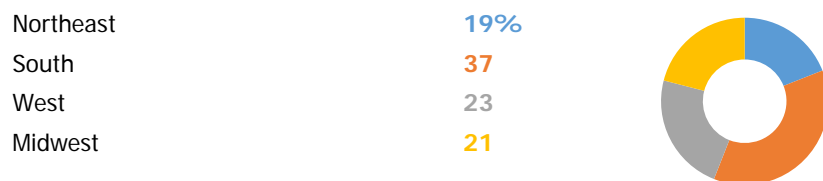


Demographics

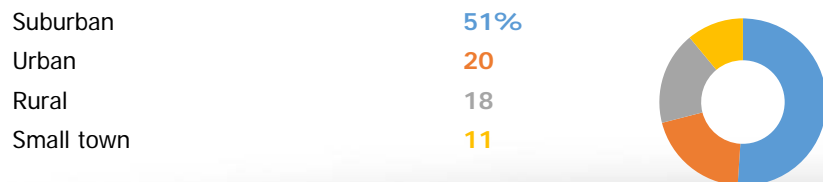
BMI Score



U.S. region



Type of location

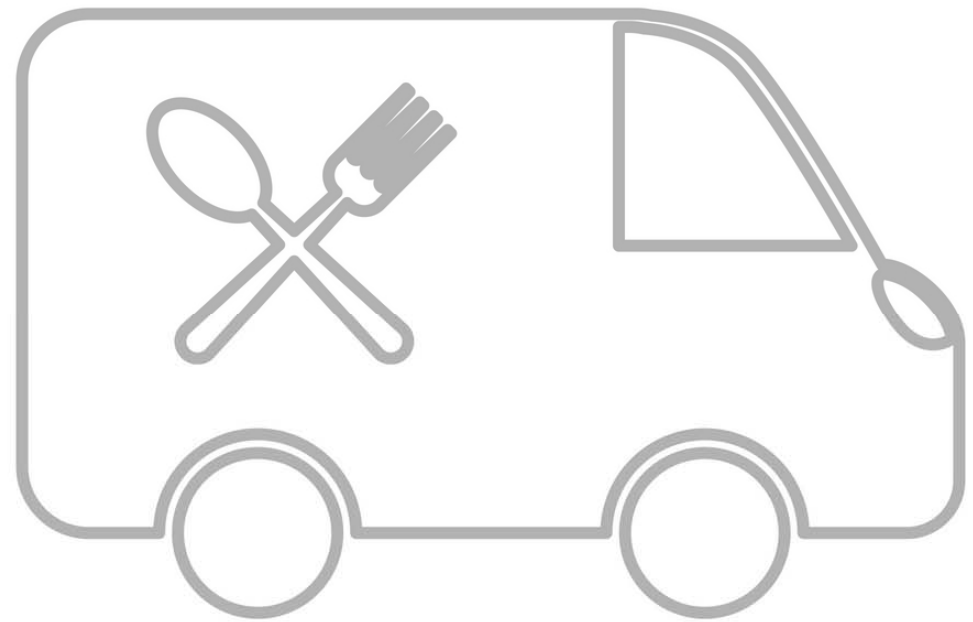


* Less than 0.5%

Health Conditions *(Multiple responses accepted)*

High blood pressure	45%
High cholesterol	37%
Arthritis	22%
Diabetes	16%
Stress/anxiety/depression	13%
Overweight/obesity	10%
Heart disease	8%
Osteoporosis	7%
Cancer	5%
Mobility/functionality or muscle loss	5%
Recent surgery	4%
Lung disease	2%
Recent hospitalization	2%
Stroke	1%
Cognitive loss	1%
Diagnosis of Alzheimer's disease or related forms of dementia	*
None of the above	27%
Prefer not to say	1%

How Consumers Grocery Shop



How Consumers Grocery Shop

A wide majority of older Americans grocery shop in-person at supermarkets, super-stores or warehouse/discount clubs for the bulk of their household needs. For most older Americans stores are easily accessible and shopping for their household needs is easy.

Only about one in six order groceries to be delivered or to be picked up from a store. Older Americans ordering groceries for delivery are likely to be in their 50s, from the Northeast, college-educated, working full-time, and white. Those with mobility issues also appear to be more likely candidates for the service, but this is a distinct consumer segment from those with higher income. Not only are few older Americans ordering their groceries but many say it's uncommon for their family, friends, and neighbors as well.

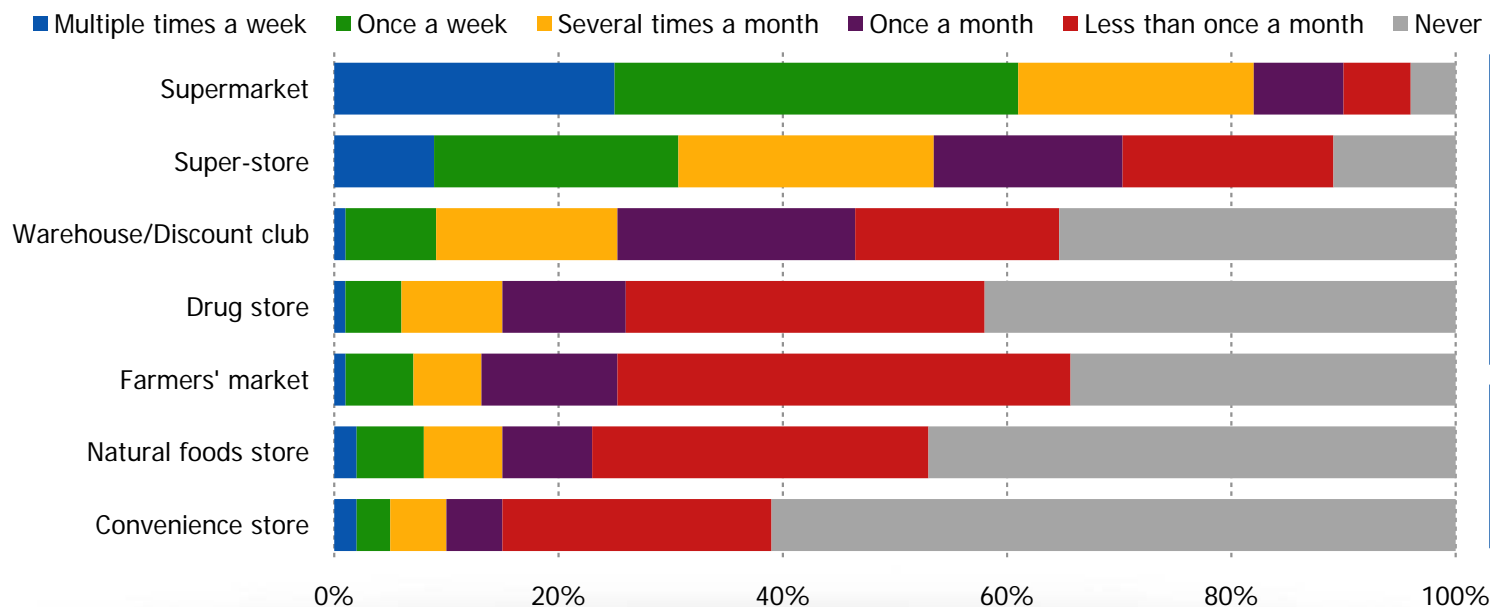
Grocery delivery and pick up services tend to be infrequent as over half of older Americans using these services do so once a month or less. Comparatively, a similar proportion report visiting any type of grocery store in-person at least once a week.



Most Older Americans Shop at Supermarkets and Superstores

Three in four visit at least one type of store at least once a week

Frequency of In-Person Grocery Shopping



Those who order grocery delivery are more frequent visitors of natural food stores such as Whole Foods and farmers' markets. 43% shop at natural food stores at least once a month and 34% say the same of farmers' markets.

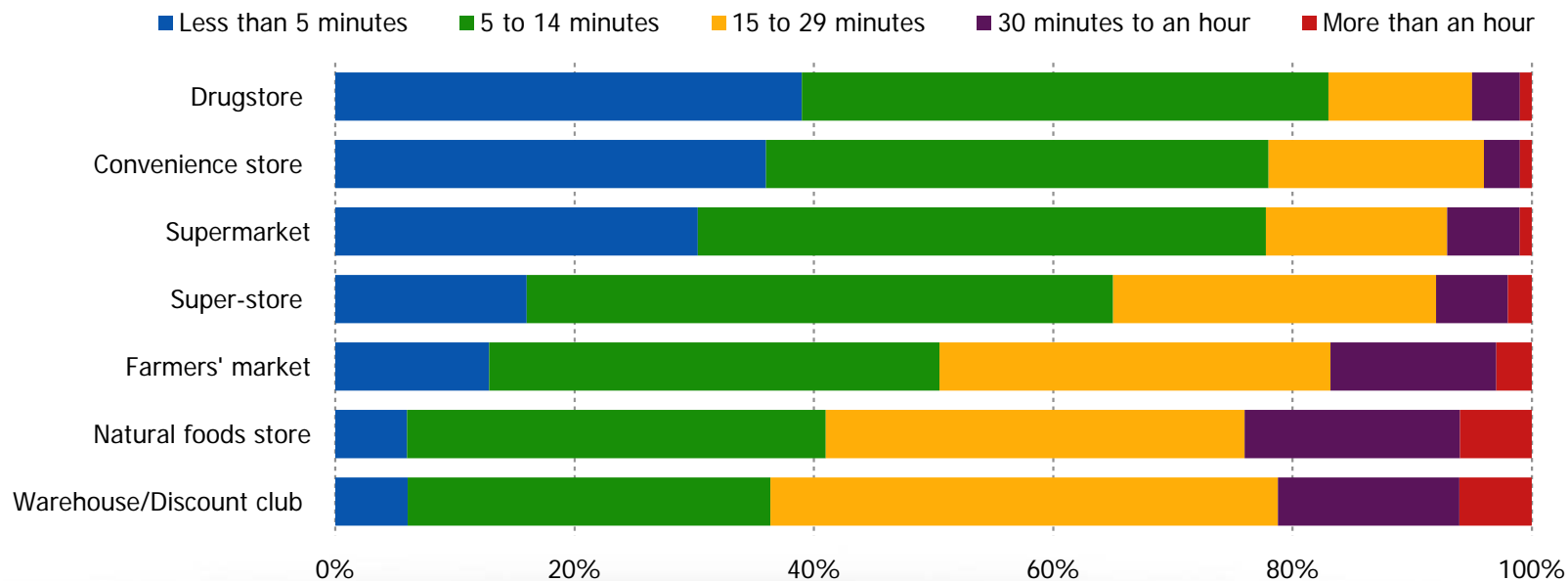
While supermarkets dominate overall, those in fair/poor health shop less frequently at this type of store.

Q9: How often do you purchase groceries in-person... (n=1,004)

Grocery Stores Are Often in Close Proximity

Nine in ten older Americans who order groceries for delivery live within 15 minutes of a store

Distance to Store Type
(Among those who shop at store type)

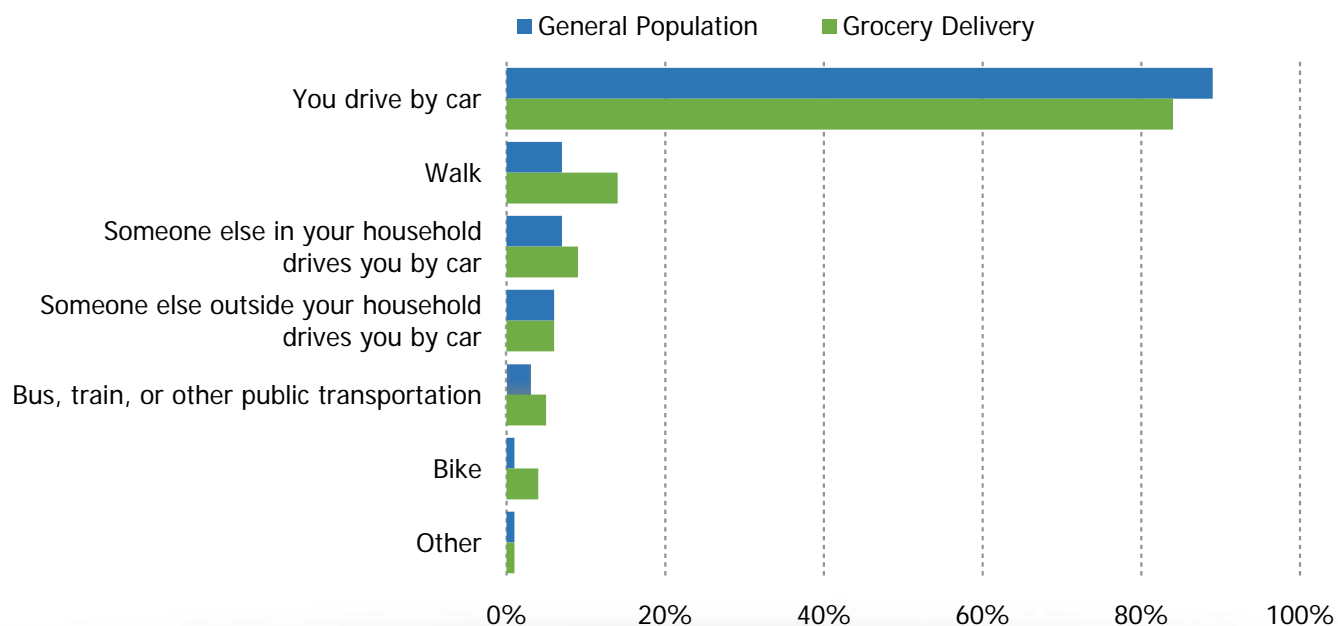


Q10: About how long does it take you to get to each of these locations from your home?
Base sizes vary by store type

Nearly All Get to the Grocery Store by Driving

Compared to all older Americans, those ordering grocery delivery are slightly more likely to walk to the store when shopping in-person. Driving is the dominant mode of transportation for both groups, however.

Transportation to Grocery Stores



Older Americans living in urban areas are more likely to walk (18%) or take a bus (13%) to the store, or be driven by someone else (12%).

Older Americans in fair or poor health (18%) and those who receive food assistance (18%) are more likely than their counterparts to have someone else drive them to the store.

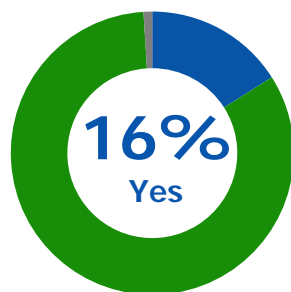
Q11: How do you typically get to these locations to grocery shop? Please select all that apply. (General Population n=994; Grocery Delivery n=367)

One in Three have Ordered Groceries, Meal Kit or Prepared Meals

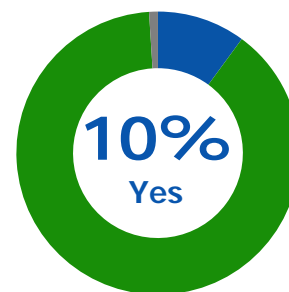
Those who order groceries are more likely to also order groceries for pick up and meal delivery, for example

Alternatives to Shopping In-person

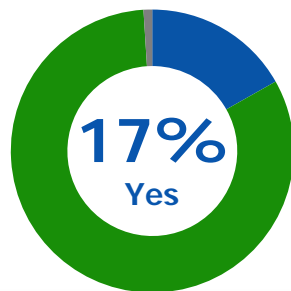
Ordered groceries to be delivered:



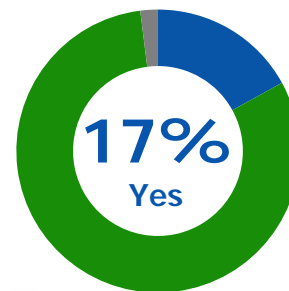
Ordered from a meal-kit delivery service:



Ordered groceries to be picked up from a store:



Ordered from a prepared meal delivery service:



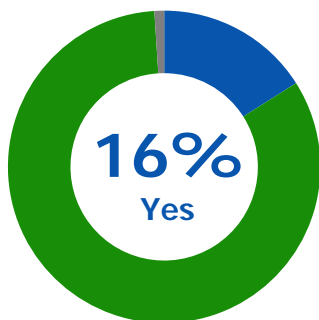
■ Yes ■ No ■ Not sure

Those who have ordered groceries to be delivered are much more likely to participate in the other alternatives, such as ordering groceries for pick up (43%), from a prepared meal delivery service (35%), and a meal kit delivery service (25%).

Q1: Have you ever done any of the following? (n=1,004)

Who is Ordering Their Groceries for Delivery?

One in six older Americans has ordered groceries for delivery. These consumers tend to be from the Northeast, younger, working full-time, with higher levels of education, and are more likely to be white.



Have you ever done any of the following –
Order groceries to be delivered to you:

■ Yes ■ No ■ Not sure

Demographics

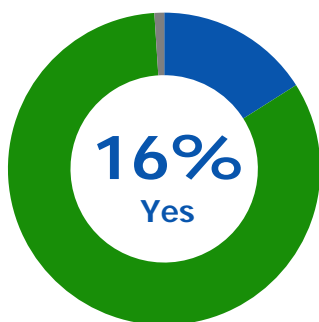
- These consumers are **younger**. 44% of consumers ordering groceries for delivery are between the ages of 50 and 59, only 8% are over age 75.
- Consumers ordering groceries for delivery are more likely to be from the **Northeast (25%)**. Consumers in the Midwest are less likely to have groceries delivered.
- A majority of consumers ordering groceries have at least a **college degree (59%)**.
- Many consumers who order groceries to be delivered are **white (86%)**.

Food/Health Differences

- Consumers ordering groceries for delivery are likely to take a **prominent role in their household's shopping**.
- Consumers who order groceries for delivery are a little more likely to **indicate difficulty shopping for their household's needs**.
- They are more likely to **walk to the grocery store** when shopping in-person, although most still drive.
- These consumers are more likely to be attentive shoppers, meaning they **pay attention to food labeling** - especially labels indicating sourcing and quality of ingredient.
- **Mobility and finding time to go to the store** are more likely to be challenges for these consumers.

Who is Ordering Their Groceries for Delivery?

Those facing mobility issues and those with higher income are likely customers of this service, but represent two distinct groups



Have you ever done any of the following –
Order groceries to be delivered to you:

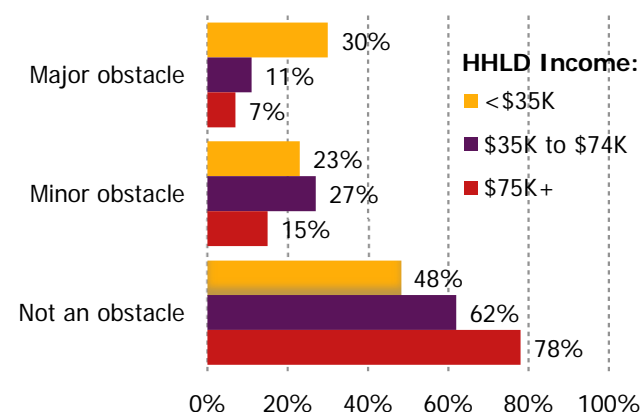
■ Yes ■ No ■ Not sure

Two Key Segments

- Not everyone that has tried a grocery delivery service fits neatly in the same profile. In fact, there are two key segments within this group of consumers that deserve special attention.
- Those who have tried a grocery delivery service skew higher income and are also more likely to face mobility issues, but these are distinct groups. Those with at least \$75K in household income are very unlikely to face mobility issues. Among those with less than \$35K, however, half face mobility issues and 3 in 10 describe it as a major obstacle.
- In comparison to the “**high income**” segment, those in the “**mobility issue**” segment are more likely to be women (70% vs. 41%), under age 65 (79% vs. 65%), and order a wider variety of food products for delivery.

Mobility Issues by Income

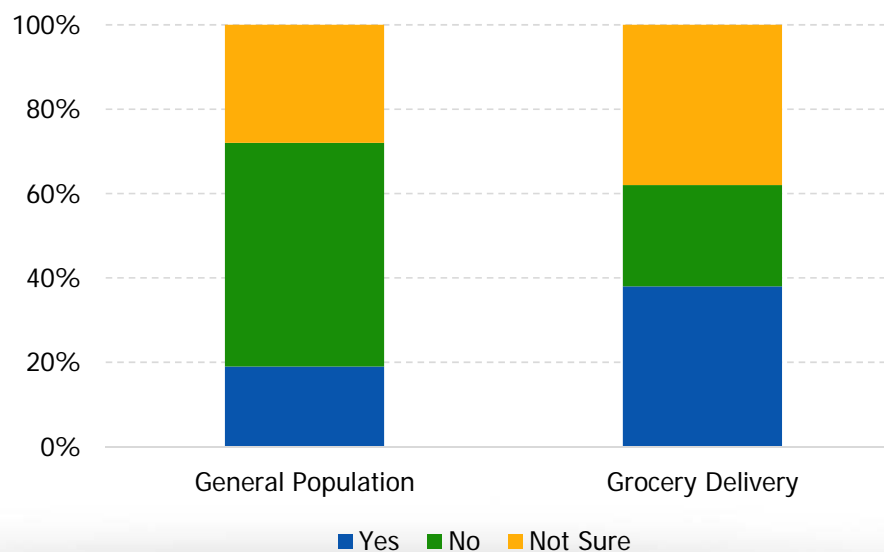
(Among those who order groceries)



Consumers Ordering Groceries are Much More Likely to Believe Others do the Same

The majority of those not ordering groceries also don't think others have done so

Think Family, Friends, or Neighbors Have Their Groceries Delivered

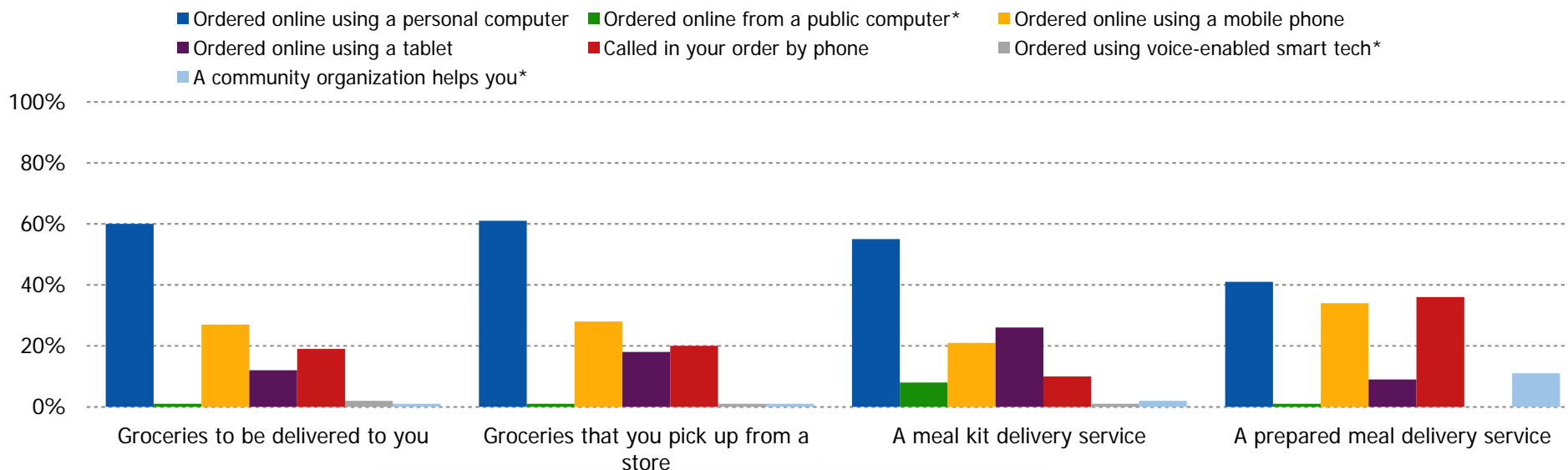


Q26: If you had to say, do you think any of your family, friends or neighbors have their groceries delivered? (General Population n=1,004; Grocery Delivery n=370)

Most Use Computers to Order Groceries or Meal Delivery

Nearly three in four who order grocery delivery use a computer and another one in five use a mobile phone

How Grocery, Meal Delivery is Ordered (Among those who use service)



Q2: What have you used to complete the following tasks? Please select all that apply.

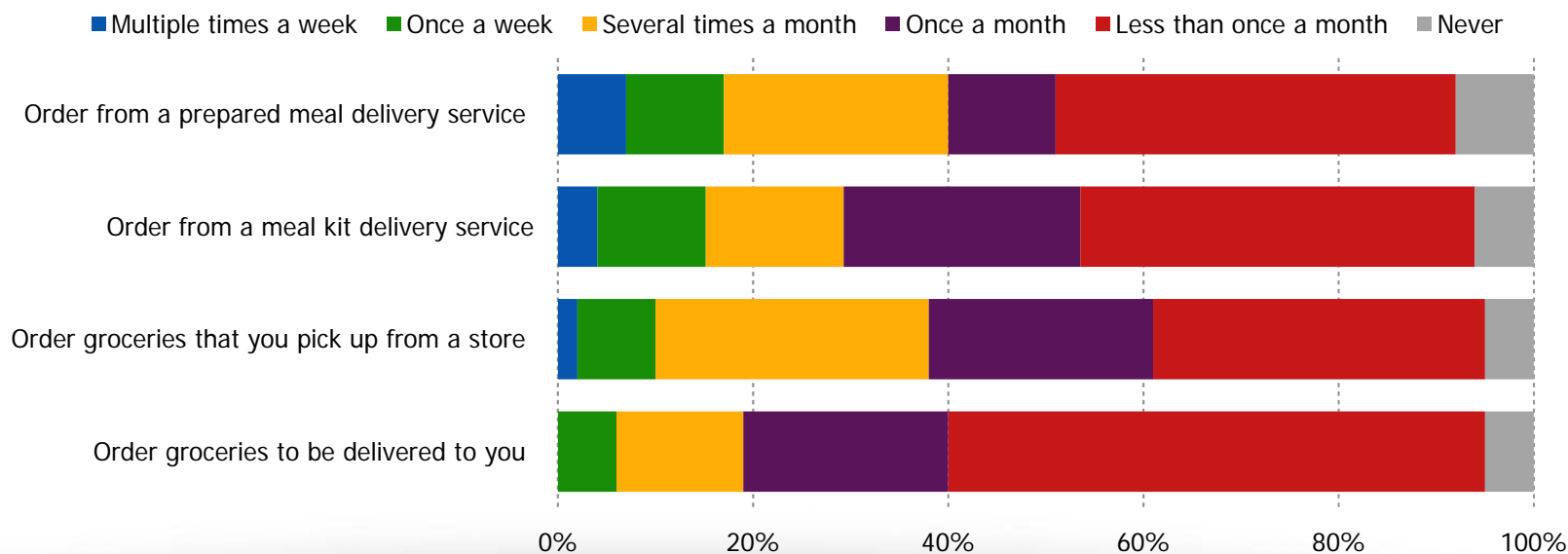
Base sizes vary by service

*Response text has been abridged

6 in 10 Use a Delivery Service Less Than Once a Month

Grocery delivery occurs less frequently than other services. Among those ordering groceries for delivery, those of higher income (53% once a month or more) ordered more frequently than their lower income counterparts (29% once a month or more).

Frequency of Ordering From Alternatives to In-person *(Among those who use service)*



Q8: How often do you...
Base size varies by service

Traditional Grocery Stores are Most Common Delivery Source

Roughly three in four ordered from a traditional grocery store, compared to about half who have used a non-traditional grocery source

Sources of Grocery Delivery
(Among those who order groceries)



Q3: When you ordered your groceries, did you order directly from a traditional grocery store/supermarket chain or from a source that is not a traditional grocery store/supermarket chain (e.g., Amazon Fresh or Peapod)? (n=370)

*Response text has been abridged

A Few Companies Dominate the Grocery, Meal Kit and Prepared Meal Delivery Market

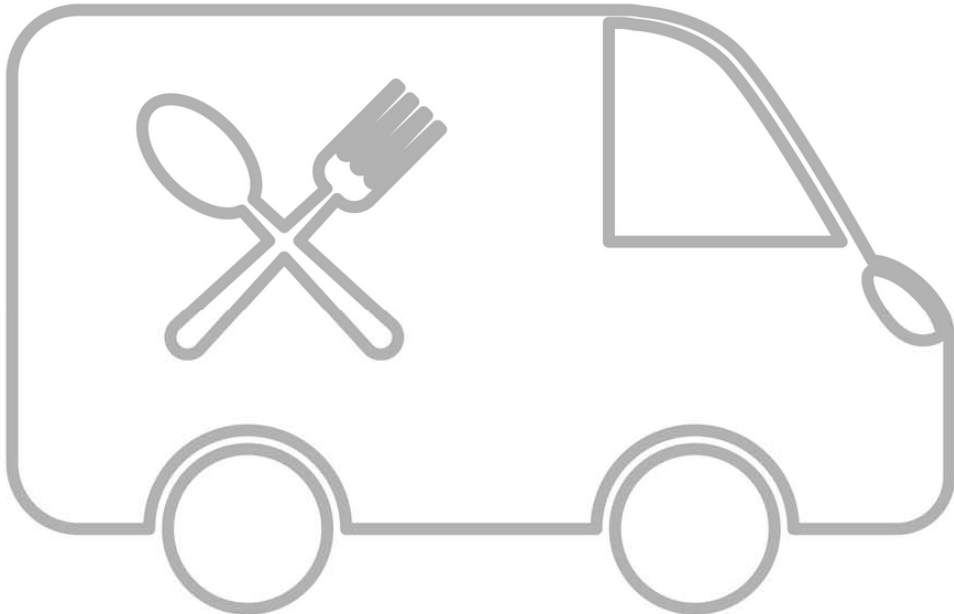
Grocery Delivery Companies		Meal Kit Delivery Companies		Prepared Meal Delivery Companies	
<i>(Top Responses Shown)</i>					
Amazon Fresh	58%	Blue Apron	63%	Schwann's	37%
Peapod	24%	Hello Fresh	42%	Ordered from a restaurant	16%
Google Express	18%	Sun Basket	10%	Freshly	12%
Fresh Direct	17%	Green Chef	9%	Mom's Meals	8%
Instacart	11%	Plated	4%	Prepped	6%
Jet	9%	Chef'd	3%	BistroMD	2%
Wal-Mart	6%	Purple Carrot	3%		
Shipt	5%				

Q4: Which of the following companies have you ever used for ordering groceries? Please select all that apply. (n=174)

Q5: Which companies have you ever used for meal kit delivery? Please select all that apply. (n=95)

Q6: Which companies have you ever used for ordering prepared meals? Please select all that apply. (n=139)

Issues that Impact Grocery Shopping



Issues that Impact Grocery Shopping

Taste, followed by price, are the most impactful factors when shopping for groceries. Compared to all older Americans, those using grocery delivery find healthfulness, brand and environmental sustainability more impactful.

About half of older Americans pay attention to labels related to the sodium, sugar, and fat content. **However, those with groceries delivered are also more apt to pay attention to labels, particularly labels related to how food is produced.**

Older Americans are generally health conscious as they rank a variety of health topics as important. Many older Americans also say these topics impact their shopping habits, especially maintaining a healthy weight and cardiovascular health. **Despite their tendency to be health conscious only three in ten find it easy to maintain a healthy diet and lifestyle.** Older Americans with groceries delivered are also more inclined to cite meal preparation as a challenge and compared to 20 years ago have more difficulty today navigating a store, finding time to go and transportation.

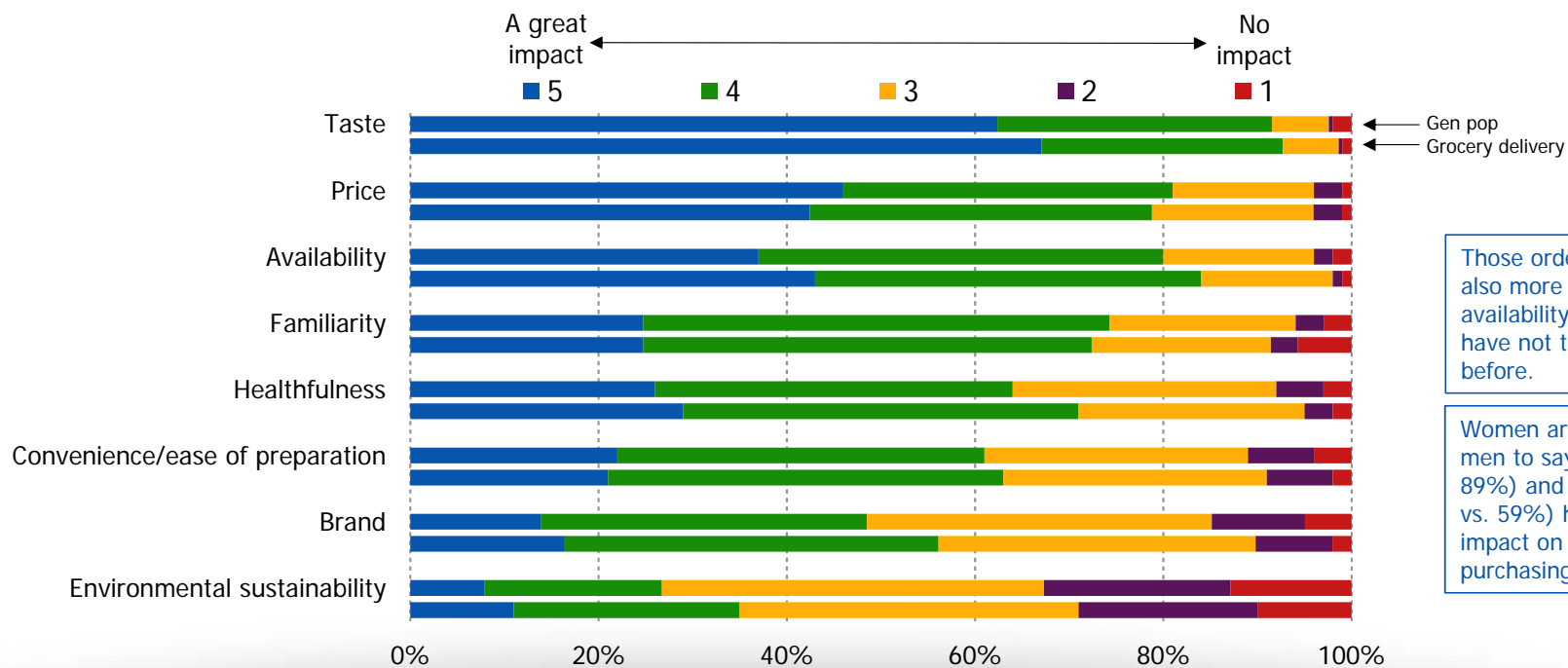
Price is the top shopping obstacle cited for all. Obstacles such as spoilage, feeling rushed, availability, mobility and transportation are more prevalent among those who have their groceries delivered.



Taste Has the Greatest Impact for Older Americans Overall

Those ordering grocery delivery are more impacted than the average consumer by healthfulness, brand, and sustainability

Impact on Buying Food and Beverages



Those ordering groceries are also more impacted by availability than those who have not tried the service before.

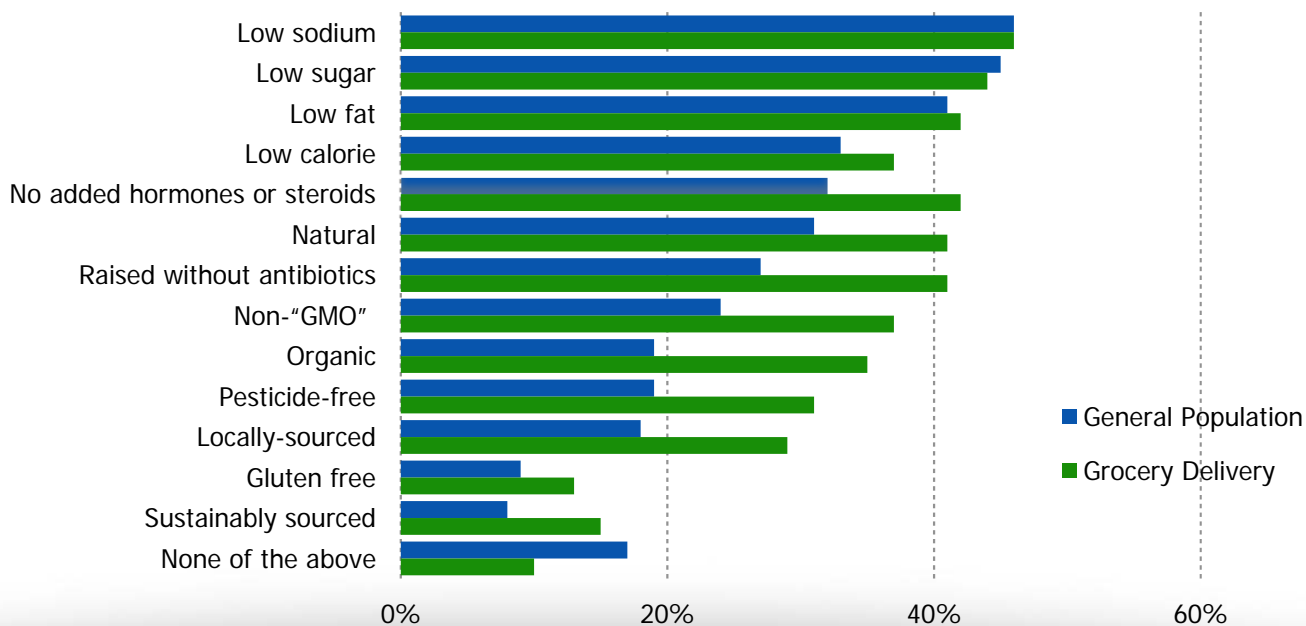
Women are more likely than men to say taste (94% vs. 89%) and healthfulness (69% vs. 59%) have a significant impact on their grocery purchasing decisions.

Q12: How much of an impact do the following have on your decision to buy foods and beverages? (General Population n=1,004; Grocery Delivery n=370)

Those Ordering Groceries Are More Attentive to Labels

Low sodium and low sugar labels garner the most overall attention, but those ordering groceries are also particularly attentive to labels related to how food is produced

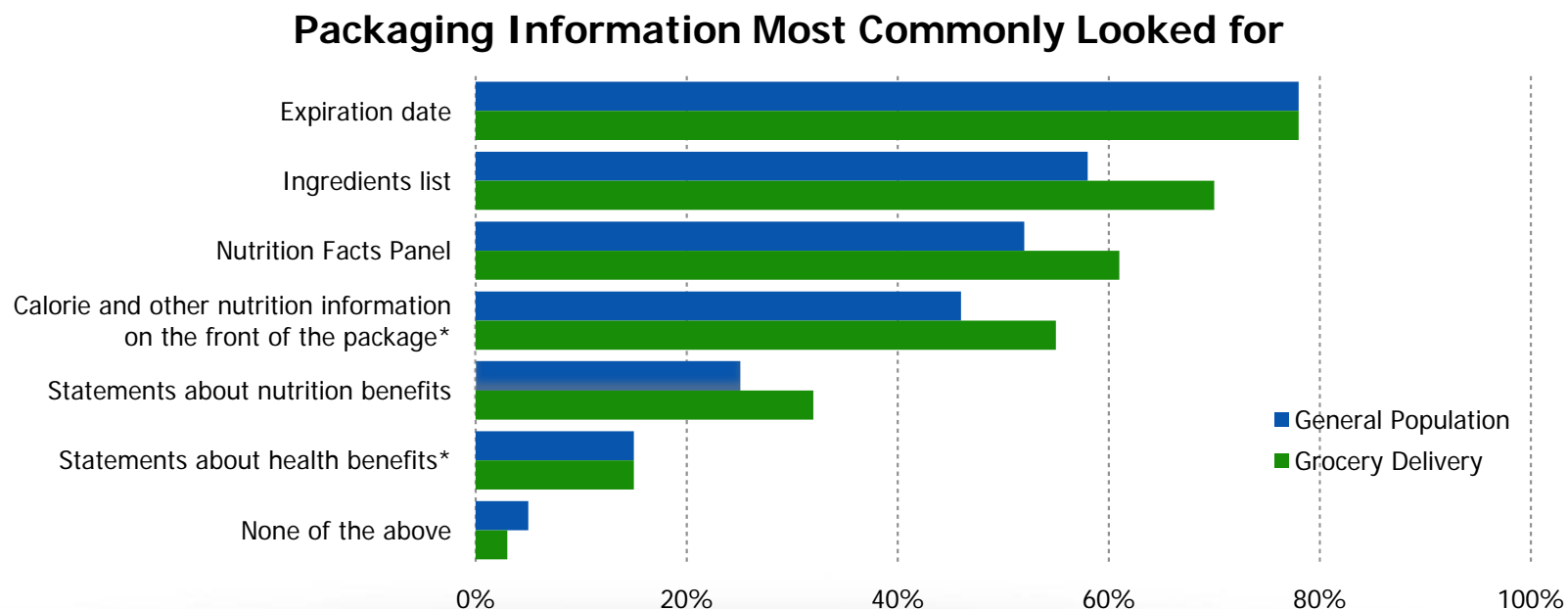
Labels Most Commonly Looked for



Q13: Which of the following labels do you generally look for when shopping for foods and beverages? Please select all that apply. (General Population n=1,004; Grocery Delivery n=370)

Expiration Date is the Most Viewed Packaging Information

Those ordering groceries are more often looking at ingredient lists, the Nutrition Facts Panel, calorie and other nutrition information, and statements about nutrition benefits



Q15: Which of the following packaging information do you generally look at when shopping for foods and beverages? Please select all that apply. (General Population n=1,004; Grocery Delivery n=370)
*Response text has been abridged

Cost and Spoilage Are the Biggest Shopping Obstacles

Half of those who get groceries delivered indicate at least one major shopping obstacle

Grocery Shopping Obstacles

General Population: ■ Major obstacle ■ Minor obstacle
 Grocery Delivery: ■ Major obstacle ■ Minor obstacle



Those ordering groceries express that it is difficult to find the right sized portions and that their local stores lack a wide selection. Additionally, they are more likely to cite produce and meat spoiling as an obstacle.

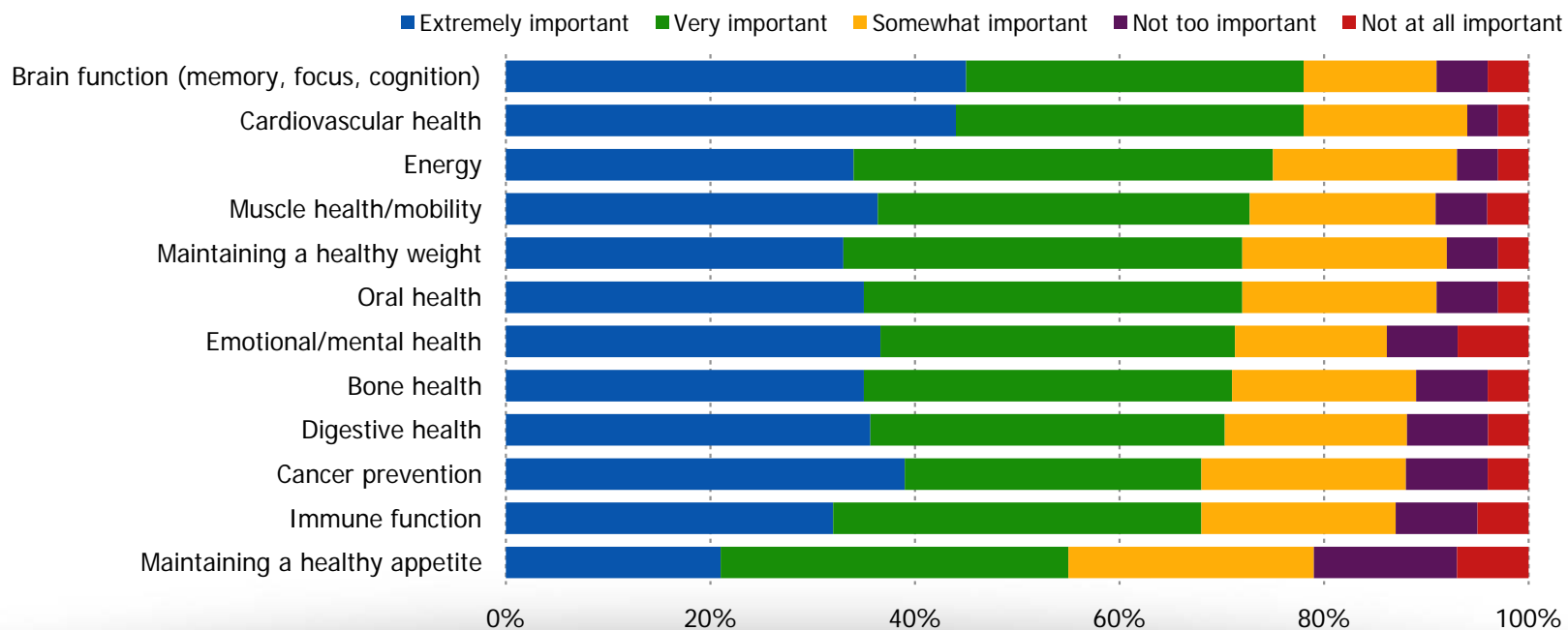
Access & Mobility: Those ordering groceries report greater difficulty getting to, and around, the grocery store. This group is more likely to cite feeling rushed at the store, finding time to shop, large distances to the store, mobility issues, and lack of transportation options as obstacles.

Q18: Thinking about shopping for all the groceries your household needs, to what extent are the following obstacles for you? (General Population n=1,004; Grocery Delivery n=370) *Response text has been abridged

Brain Function And Heart Health Are Top Priorities

Older Americans cited an average of eight topics being "extremely" or "very" important

Importance of Health Topics

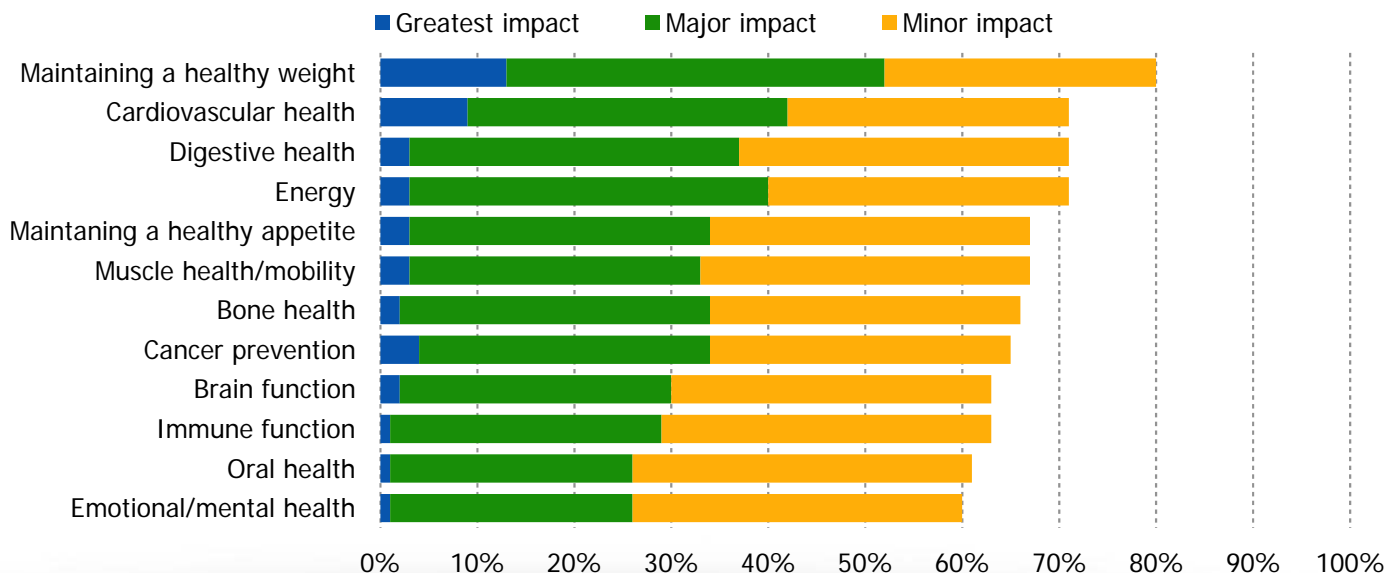


Q32: How important are the following health topics to you currently? (n= 1,004)

Those Ordering Groceries Do Not Differ on Impact of Issues

Of the identified important health topics, healthy weight and cardiovascular activity are the most likely to impact grocery shopping habits

Impact of Topics on Shopping Habits
(Of those who place some importance on each topic)

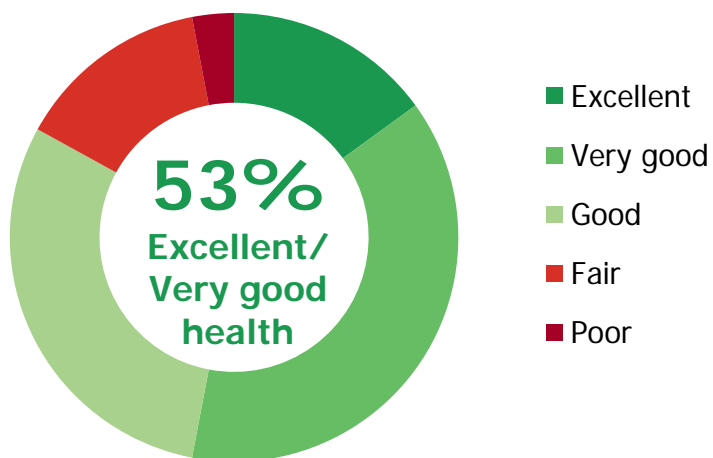


Q33: Which of the following health topics currently have an impact on your grocery shopping habits?
Note: Includes only statements from Q32 ranked somewhat important or higher

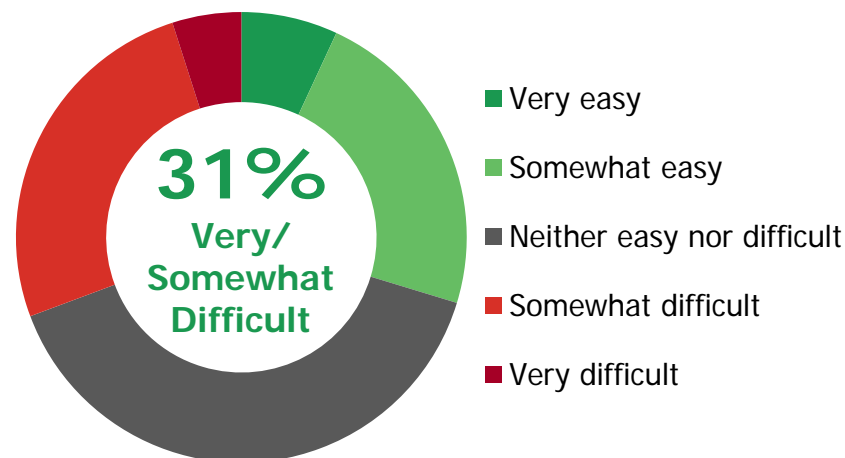
Over Half Report Good Health But One in Three Find it Difficult to Maintain a Healthy Diet

There is no difference in health status between all respondents and those who get groceries delivered. Consumers in their 50s find it harder to maintain a healthy diet with 39% saying it is very/somewhat difficult compared to 25% of those over 65.

Current Health Status



Difficulty in Maintaining a Healthy Diet



Q30: How would you rate your current health status? (n=1,004)

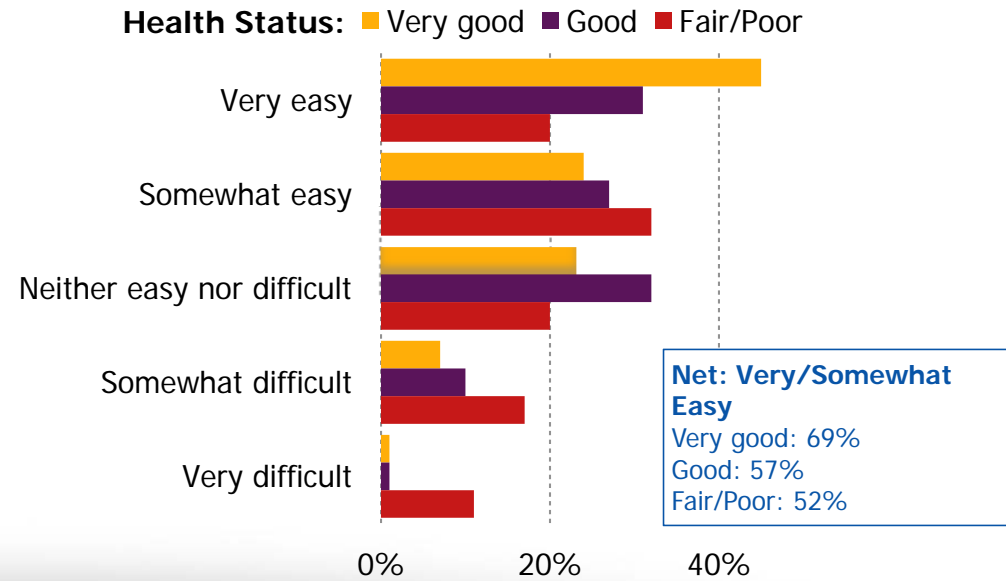
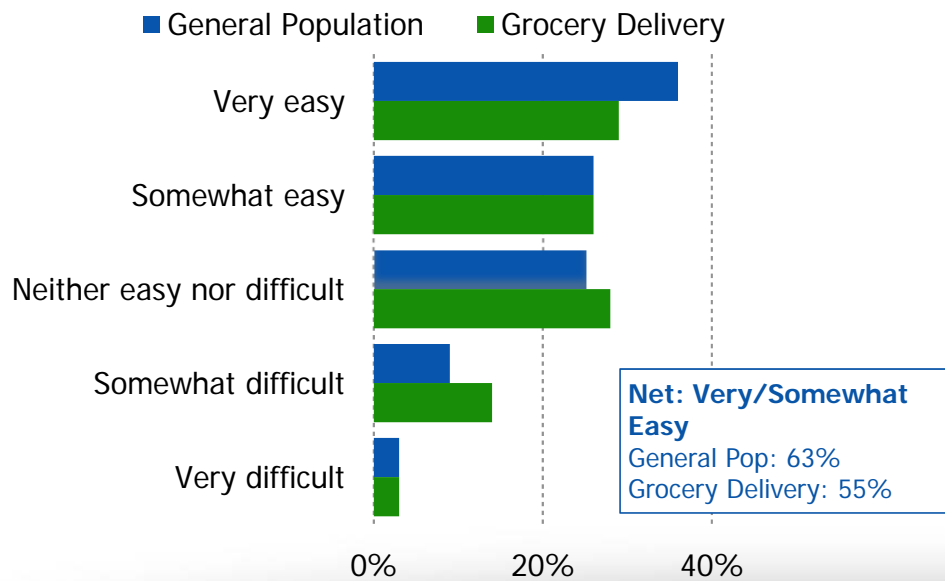
Q31: How difficult is it for you personally to maintain a healthy diet? (n=1,004)

Those Ordering Grocery Delivery Find Shopping for Their Household's Grocery Needs a Little More Difficult

About one in six who order groceries for delivery claim it is somewhat or very difficult to shop for their groceries

Older Americans in worse health find it more difficult to shop for their household needs

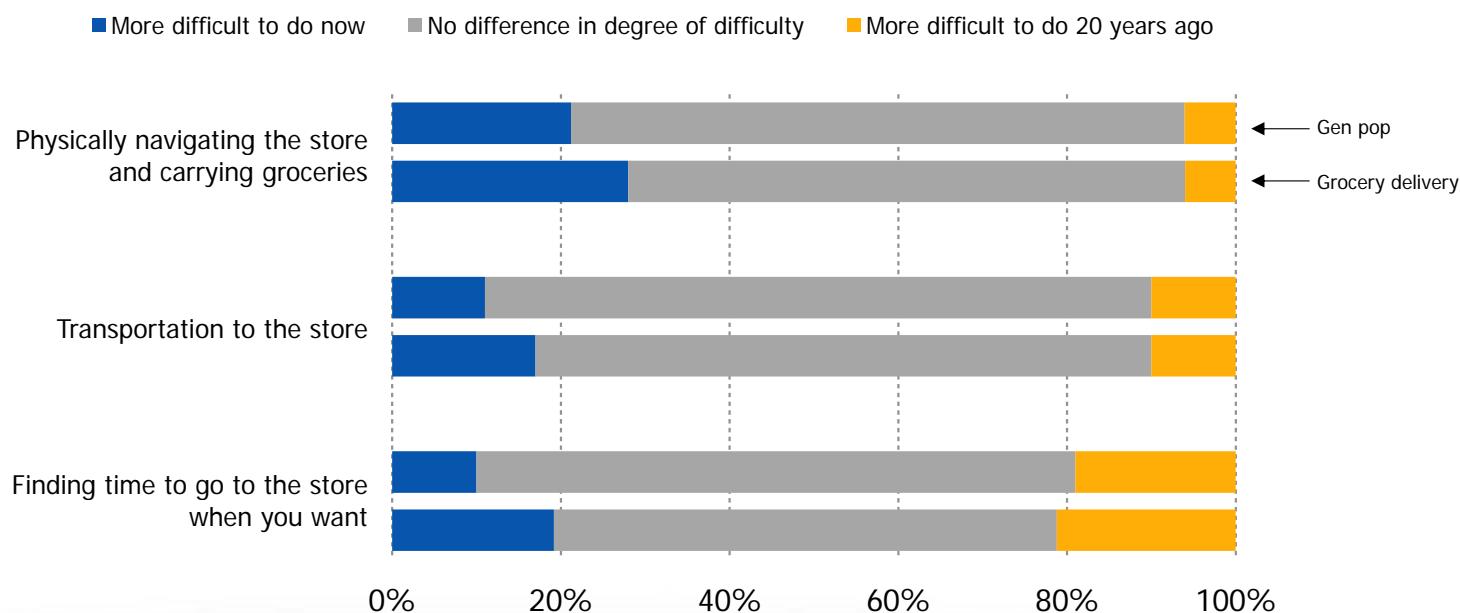
Difficulty in Maintaining a Healthy Diet



Q17: How difficult is it for you personally to shop for all the groceries your household needs? (General Population n=1,004; Grocery Delivery n=370)

Those Ordering Groceries Find Navigating the Store, Transportation and Finding Time to Shop More Difficult Now

Degree of Difficulty Now vs. 20 Years Ago

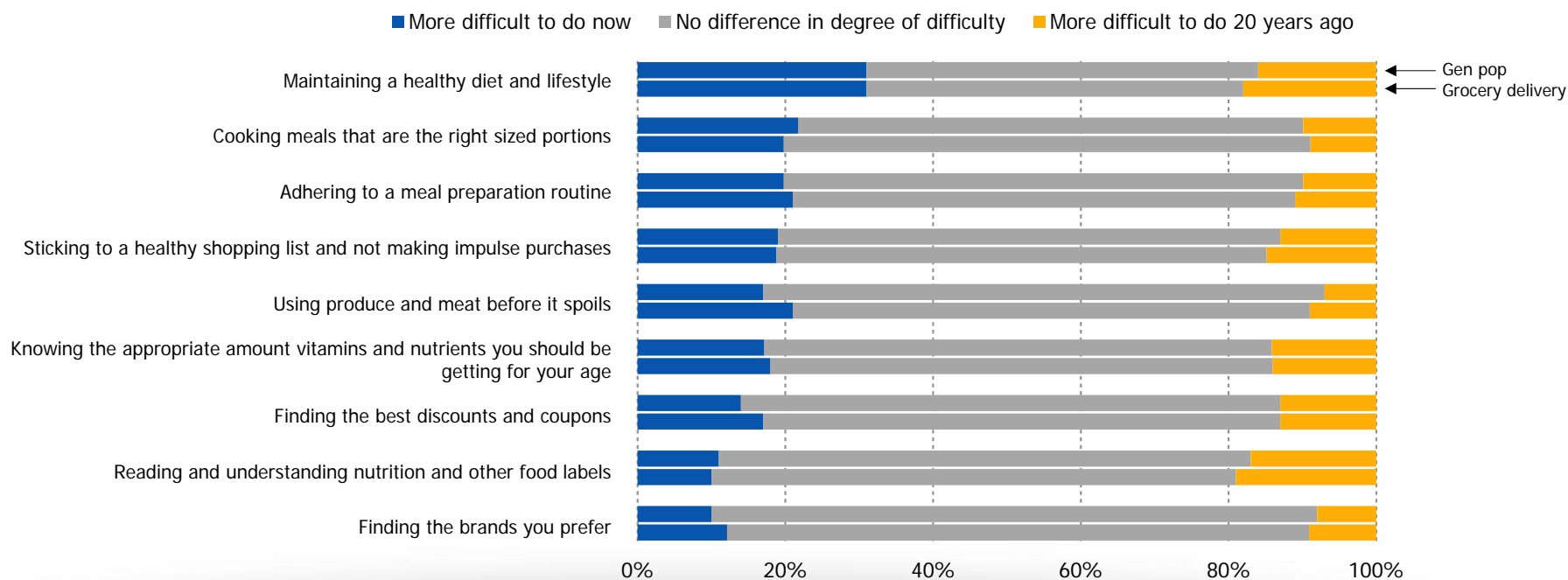


Q34: Which of the following do you find more difficult to do now versus 20 years ago? (General Population n=1,004; Grocery Delivery n=370)

3 in 10 Find Maintaining a Healthy Diet More Difficult Now

Those with lower income are more likely to find many of these tasks harder now vs. 20 years ago

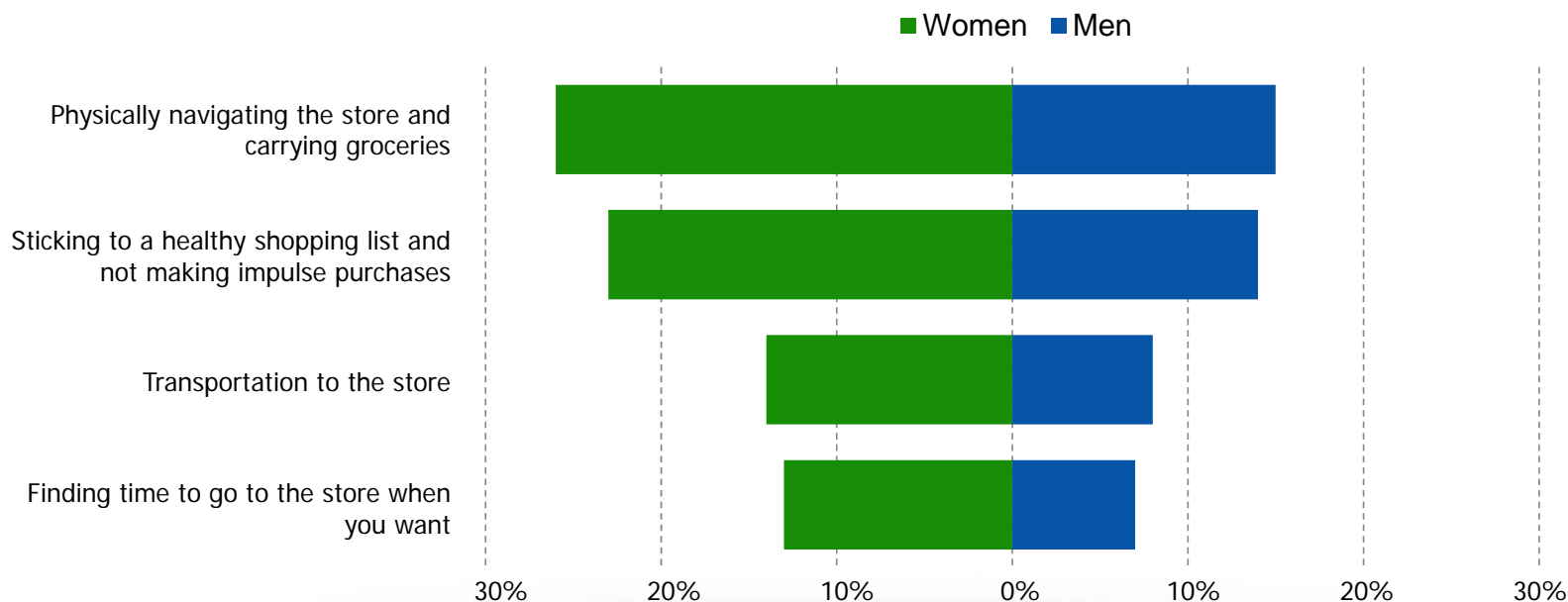
Degree of Difficulty Now vs. 20 Years Ago



Q34: Which of the following do you find more difficult to do now versus 20 years ago? (General Population n=1,004; Grocery Delivery n=370)

Compared to Men, Women Find a Number of Aspects of Grocery Shopping More Difficult to Do Now

Degree of Difficulty
(% More difficult now vs. 20 years ago)

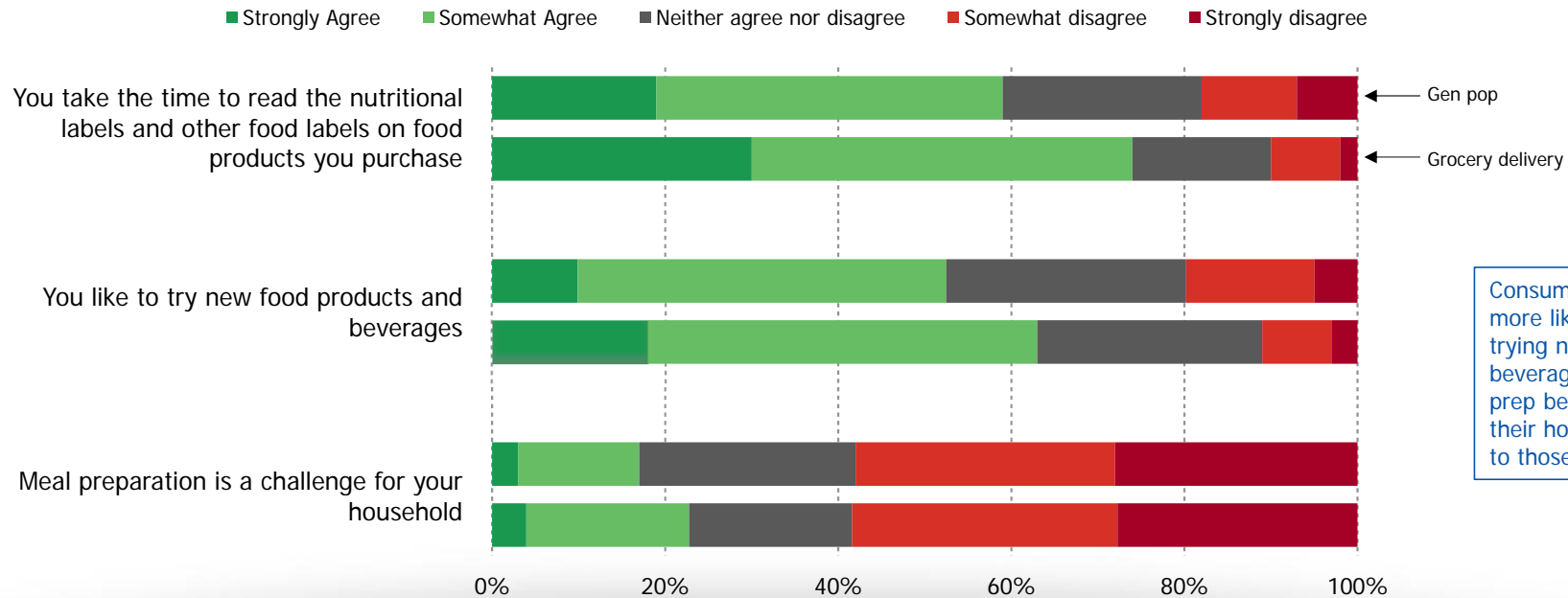


Q34: Which of the following do you find more difficult to do now versus 20 years ago? (General Population n=1,004; Grocery Delivery n=370)

Those Ordering Groceries Differ on Label Attentiveness, Trying New Food Products, and Meal Prep

Three in four of those ordering online take the time to read nutritional labels compared to a little more than half of the general population

Sentiments About Grocery Shopping



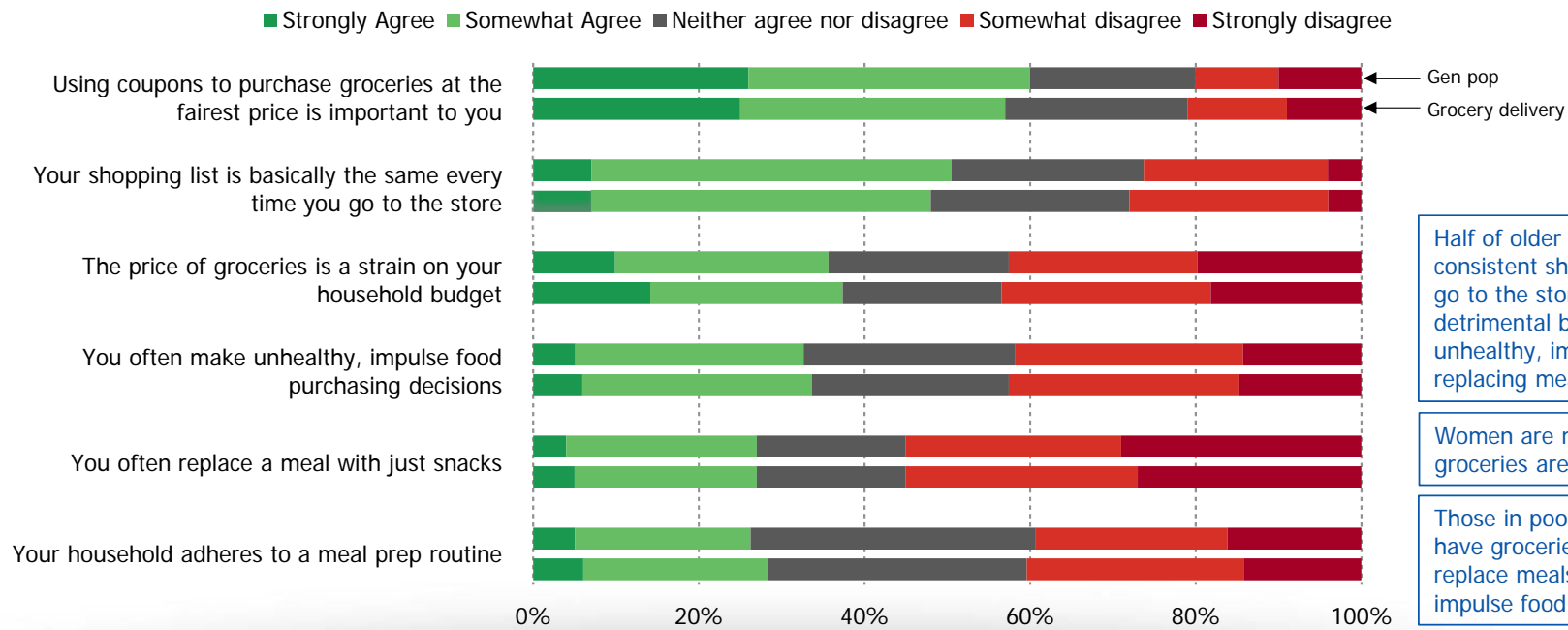
Consumers in their 50s are more likely to say they like trying new food and beverages as well as meal prep being a challenge for their household compared to those older than 65.

Q19: Please indicate if you agree or disagree with the following statements. (General Population n=1,004; Grocery Delivery n=370)

Coupons Are an Important Part of Purchasing Groceries for Older Americans

One in three report prices of groceries being a strain on their household budget

Sentiments About Grocery Shopping



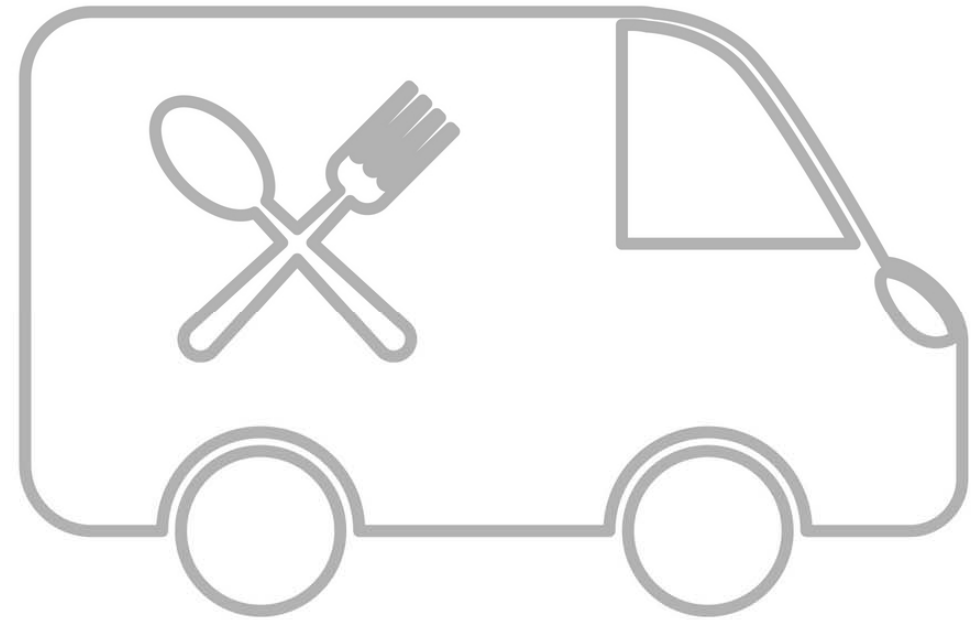
Half of older Americans rely on consistent shopping lists each time they go to the store. Few are reporting detrimental behaviors such as making unhealthy, impulsive food purchases or replacing meals with just snacks.

Women are more likely than men to say groceries are a strain on the HH budget.

Those in poor health are more likely to have groceries be a strain on budget, replace meals with snacks, and make impulse food purchasing decisions.

Q19: Please indicate if you agree or disagree with the following statements. (General Population n=1,004; Grocery Delivery n=370)

Experience and Satisfaction of Ordering Groceries



Experience and Satisfaction of Ordering Groceries

Satisfaction among those ordering groceries is relatively high. In regards to fees and delivery times, gaps exist between the expectations of older Americans and those who already use grocery delivery services. **The share of older Americans ordering groceries who pay added fees is larger than the share willing to pay fees.** Though respondents using delivery services pay more than what older Americans overall are willing to pay, two-thirds say the fees are about what they would expect or less.

Older Americans expect a quick delivery for ordered groceries. Those who have ordered groceries for delivery report longer delivery windows than older Americans overall expect. Half expect ordered groceries to be delivered same day but one-third of those who have had groceries delivered say they arrive next day.

Non-perishables and household staples not for consumption (cleaning and paper products) are the products which are most ordered and most comfortable being ordered.

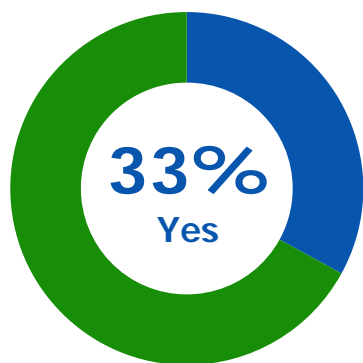
Despite the interest in labels and packaging information among older Americans ordering their groceries for delivery, **many find it more difficult to identify product and packaging labels when ordering as compared to in-person.**



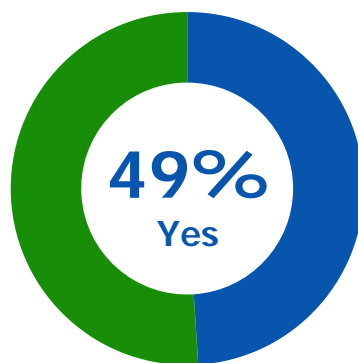
Most Older Americans are Not Willing to Pay Added Fees

Older Americans ordering groceries for delivery are paying more in fees than what older Americans generally are willing to pay

Willing to Pay Fee?
(Among those not ordering groceries)



Pays Fee For Delivery?
(Among those who order groceries)



**Average Fee Paid
Per Order: \$9.70**

Only 33% of older Americans not currently ordering groceries would be willing to pay a fee. Of these people, the average fee they would be willing to pay is \$7.60 per order.

In reality, 49% of those ordering groceries pay a fee with the average being \$9.70 per order.

Only 34% of those 65 and older would pay an added fee for delivery, significantly lower than the 47% of those in their 50s.

Q22: When you order groceries to be delivered, about how much do you pay in added delivery, service or subscription fees? (Grocery Delivery n=370); How much would you be willing to pay in added delivery, service or subscription fees if you ordered groceries to be delivered? (General population n=857)

Satisfaction is Fairly High for Grocery Delivery Service

Two-thirds who pay a fee for the service say the fee was about what they expected or less

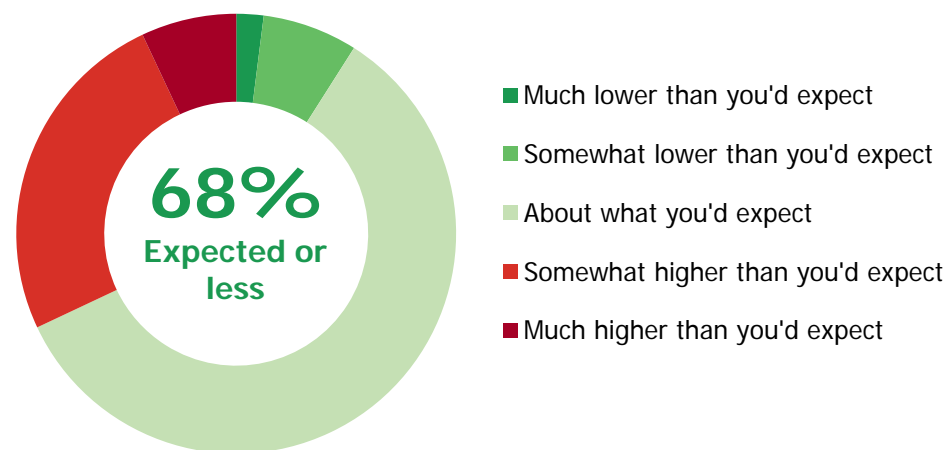
Grocery Delivery Satisfaction

(Among those who order groceries for delivery)



Fee Expectations

(Among those who order groceries for delivery and paid fee)



Q25: How would you rate your level of satisfaction with ordering groceries to be delivered? (Grocery Delivery n=370)

Q23: How do the added fees that you have to pay for groceries to be delivered compare to what you would expect to pay for the service? (Grocery Delivery and paid fee n=181)

Nearly all Older Americans Would Expect Groceries to Arrive the Same or Next Day

For those already ordering groceries, a smaller share - only two in three - say their delivery arrives that quickly

Delivery Length vs. Expected Delivery Length

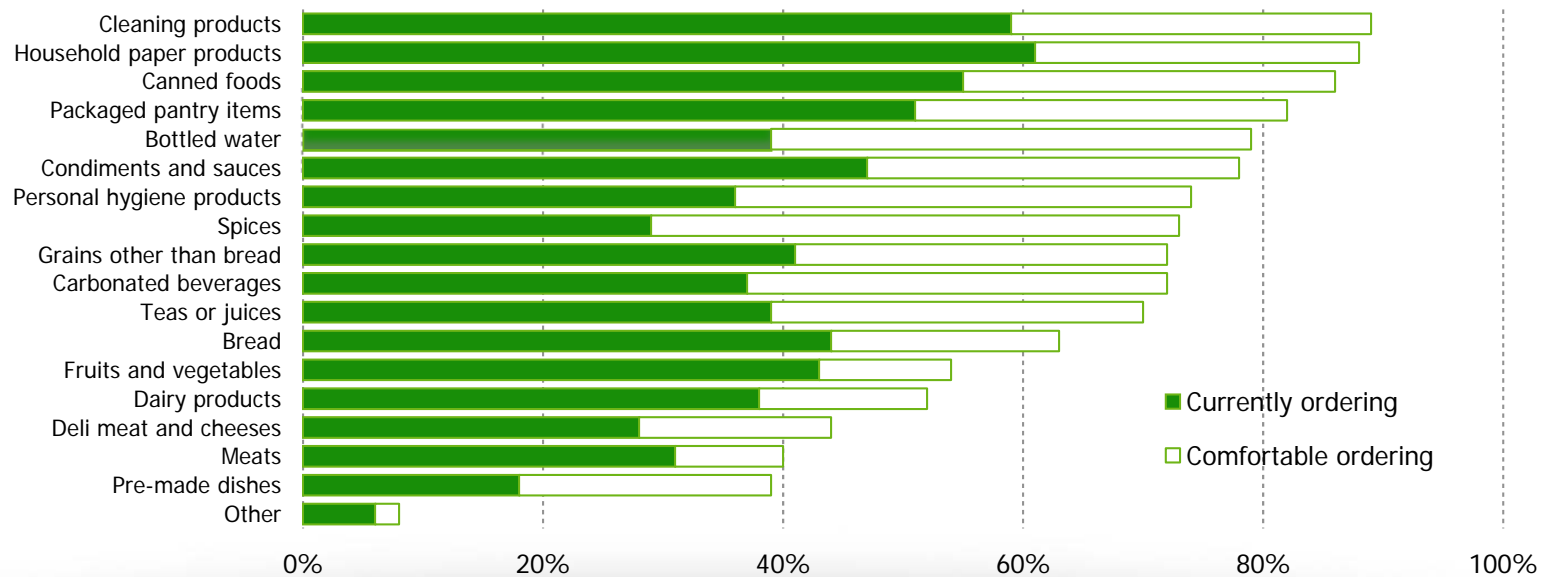


Q24: About how long does it take your grocery order to arrive? (Grocery Delivery n=370); If you were to order groceries to be delivered, about how long would you expect it to take for the groceries to arrive? (Not Currently Ordering n=857)

Cleaning Products, Paper Products and Canned Foods Are the Most Commonly Ordered Items for Delivery

The majority of those ordering groceries either already do or would be comfortable ordering most items, with the exception of deli meat/cheese, meats, and pre-made dishes

Grocery Items Ordered for Delivery
(Among those ordering groceries)

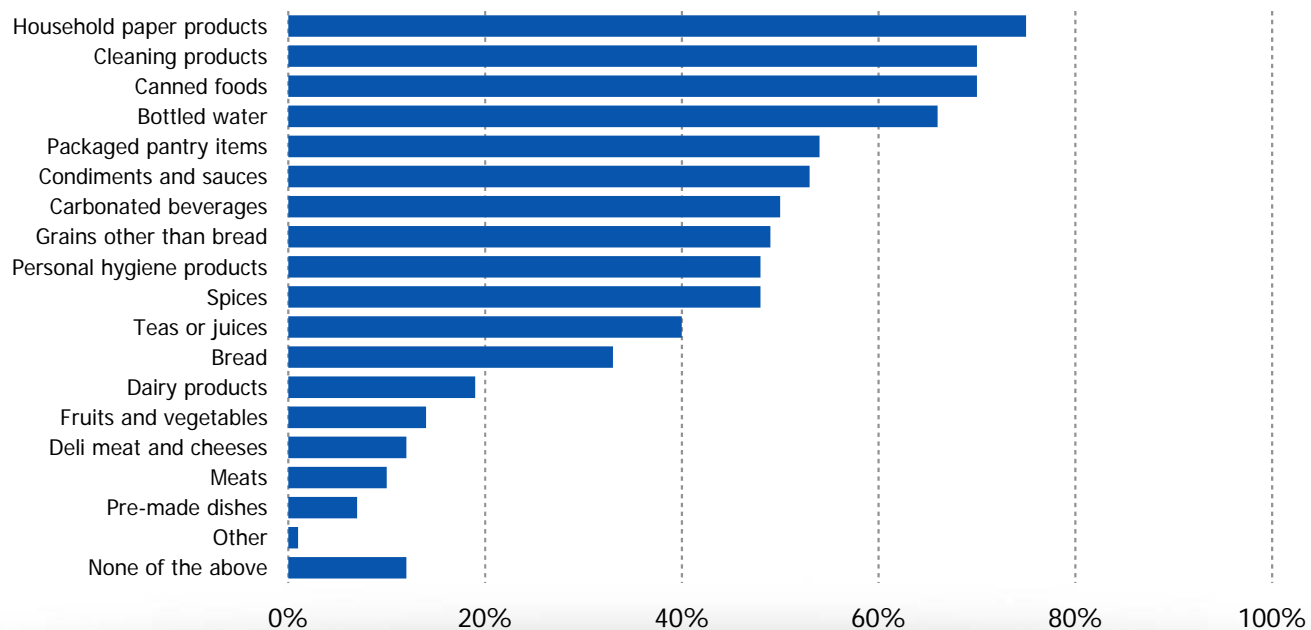


Q20: Which of the following grocery items have you ever ordered to be delivered? Please select all that apply. (Grocery Delivery n=370)

Q21: Which of the following grocery items would you be comfortable ordering to be delivered, even if you haven't done so yet? (Grocery Delivery n=370)

Those Not Currently Ordering Groceries Are Most Comfortable With the Same Items as Those Ordering

Grocery Items Others Would Be Comfortable Ordering For Delivery
(Among those who haven't ordered groceries)



The biggest differences between those already ordering grocery delivery are with **food** items including meats, pre-made dishes, fruits and vegetables, deli foods, dairy products, and bread.

Higher income older Americans are more comfortable ordering most of these products for delivery compared to those with lower incomes.

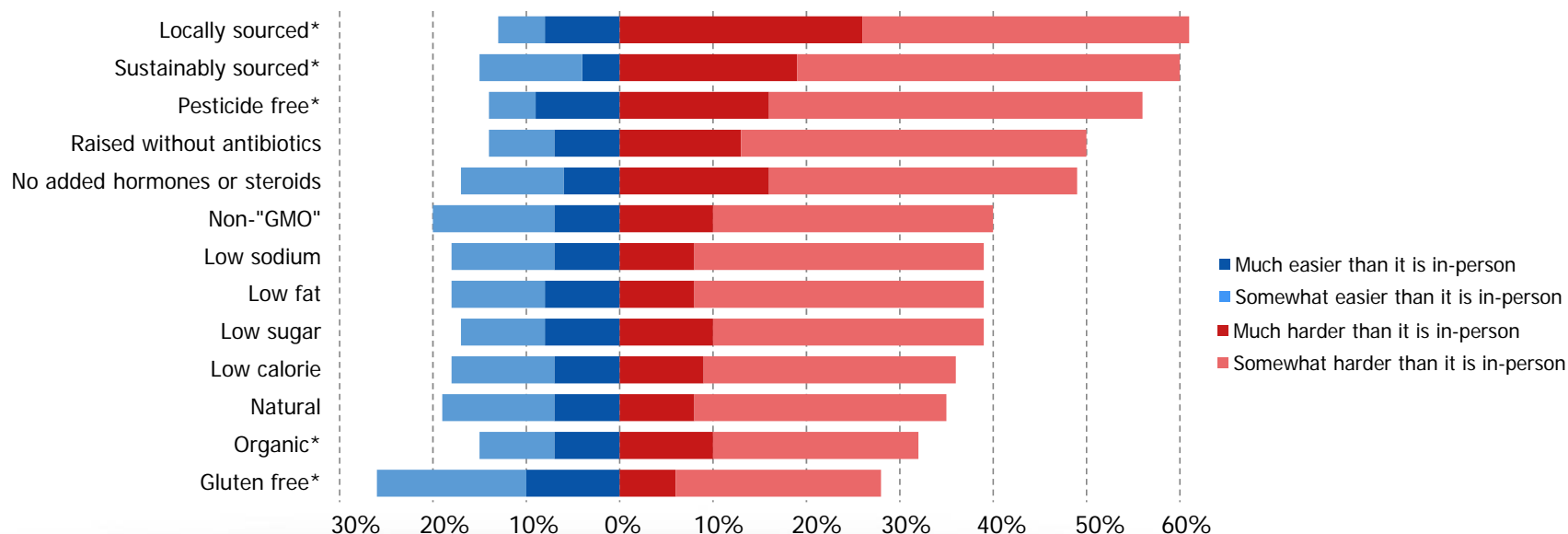
Q21: If you were to order groceries to be delivered, which of the following grocery items would you be comfortable ordering that way? (Not Currently Ordering n=857)

Online Ordering Does Not Make Looking at Labels Easier

Despite healthfulness being a higher priority, few claim ordering makes it any easier to identify these criteria compared to in-person

Ease of Looking for Labels When Ordering Groceries

(Among those ordering groceries and looking for these labels)



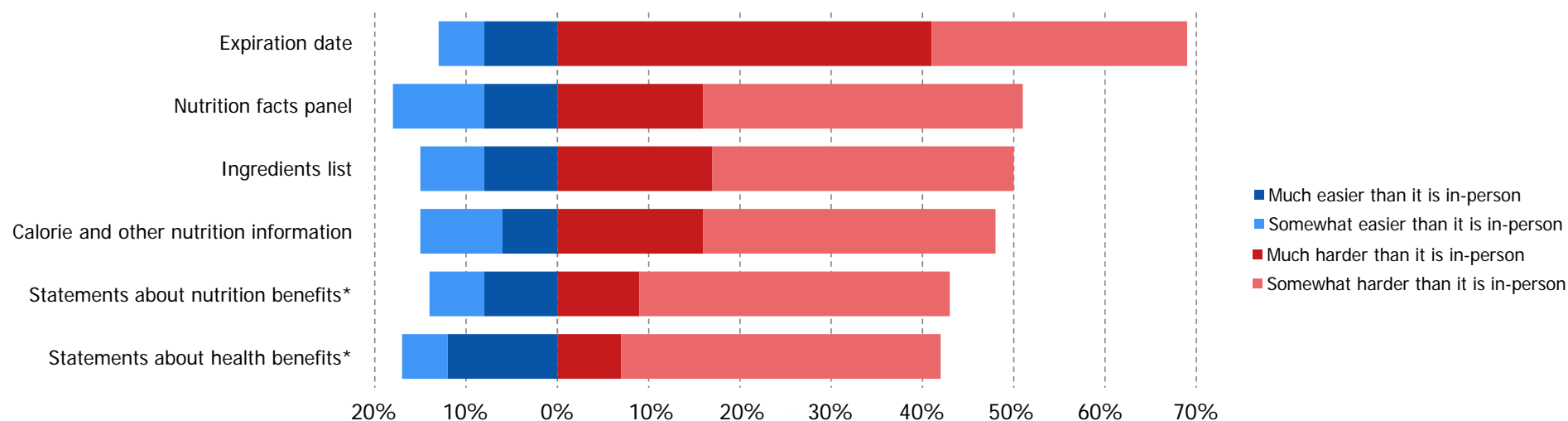
*Q14: You identified the following as food and beverage labels you look for in general. Now think about your experience ordering groceries to be delivered. In comparison to shopping in-person, how easy is it to identify whether the food you are ordering meets these criteria? (Sample sizes vary by item) *Small sample size*

Packaging Info is Also Harder to Find When Ordering

Expiration date is by far the hardest packaging information to identify when ordering groceries

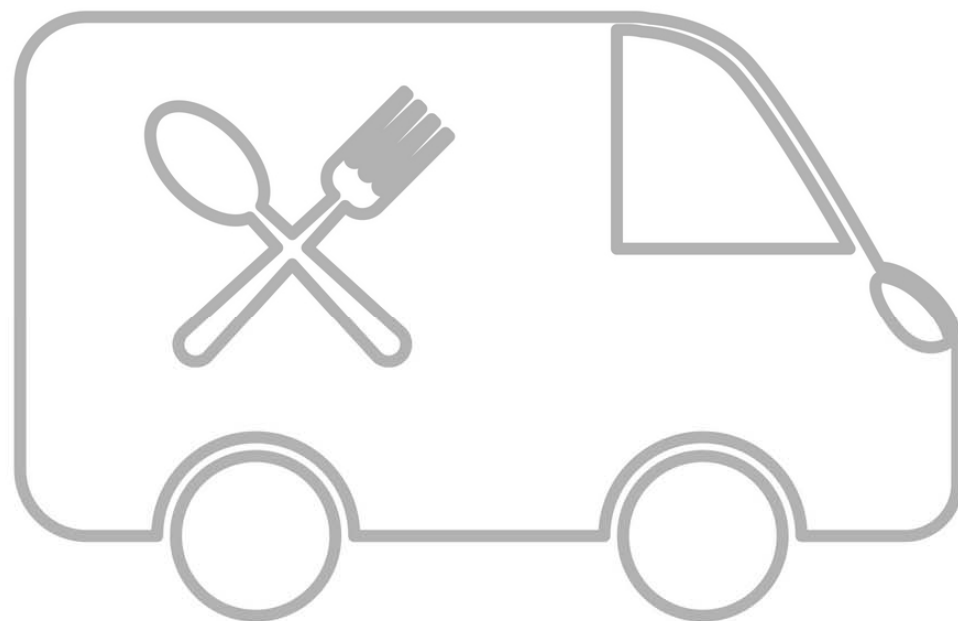
Ease of Looking for Packaging Information When Ordering Groceries

(Among those ordering groceries and looking for this information)



Q16: You identified the following as food and beverage packaging information you look at in general. Now think about your experience ordering groceries to be delivered. In comparison to shopping in-person, how easy is it to find this information when ordering groceries? (Sample sizes vary by item) *Small sample size

Motivations and Barriers to Ordering Groceries



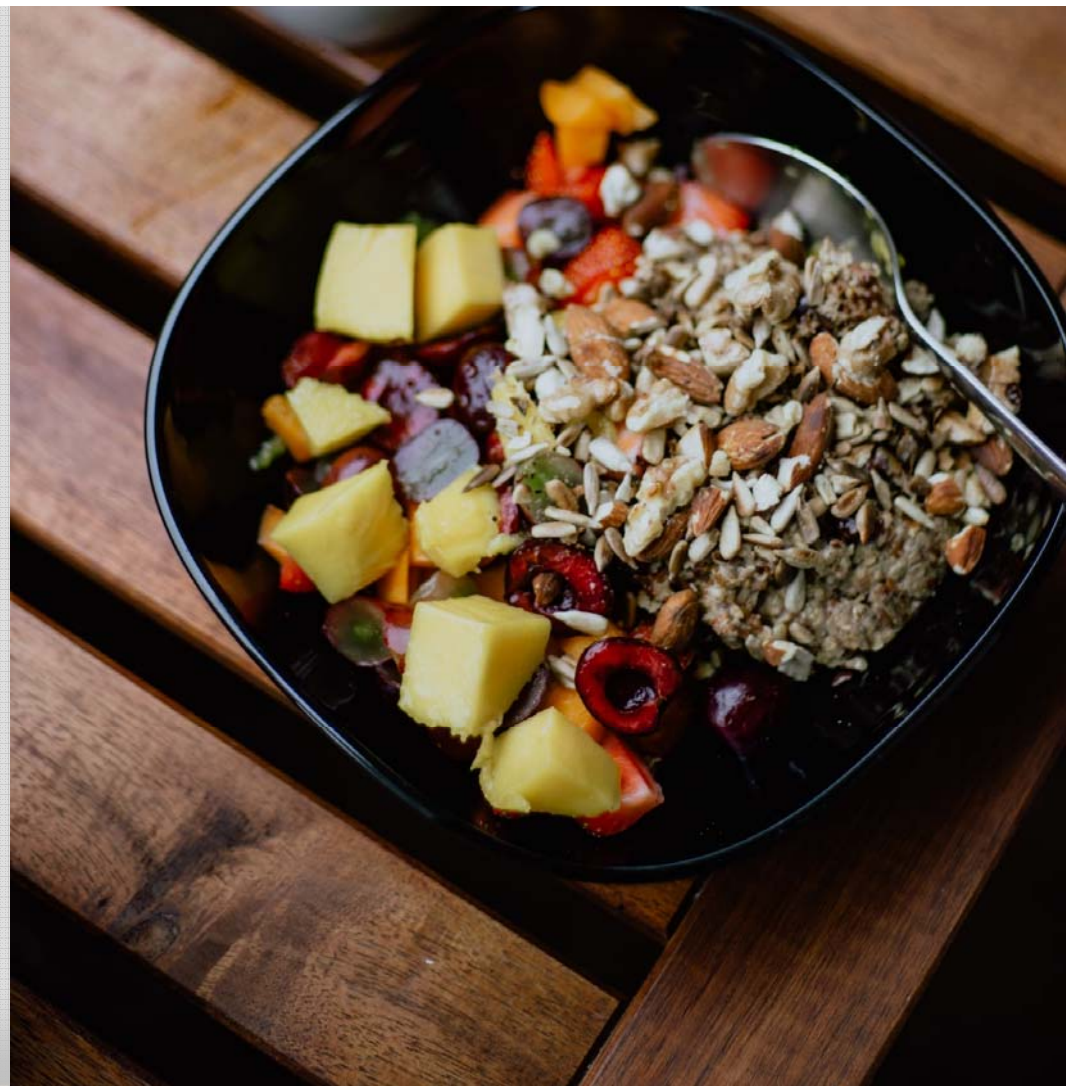
Motivations and Barriers to Ordering Groceries

Not having to deal with the physical and time constraints of in-person shopping are the top motivators for older Americans to shop online.

Meanwhile, fees, a perceived lack of quality, and the desire to see/touch foods are top barriers to online grocery ordering. Safety concerns about home delivery are not high.

From finding discounts and preferred brands to reading nutrition labels, few older Americans believe grocery shopping online for delivery is easier than in-person. Though most express skepticism about shopping online, a sizable minority believe it to be easier to stick to a healthy shopping list when shopping online.

Guaranteeing quality and fair prices are the most likely way potential and current customers would be encouraged to overcome barriers. About two in three older Americans say personally inspected produce, guaranteed delivery time frame, special coupons, and loyalty programs would encourage them to order online. Current customers are especially encouraged by loyalty programs.



Those Ordering Grocery Delivery Are Motivated by Physical and Time Constraints of Traditional Grocery Shopping

Motivating Factors for Ordering Grocery Delivery

Not Currently Ordering: ■ Major factor ■ Minor factor
 Orders Grocery Delivery: ■ Major factor ■ Minor factor



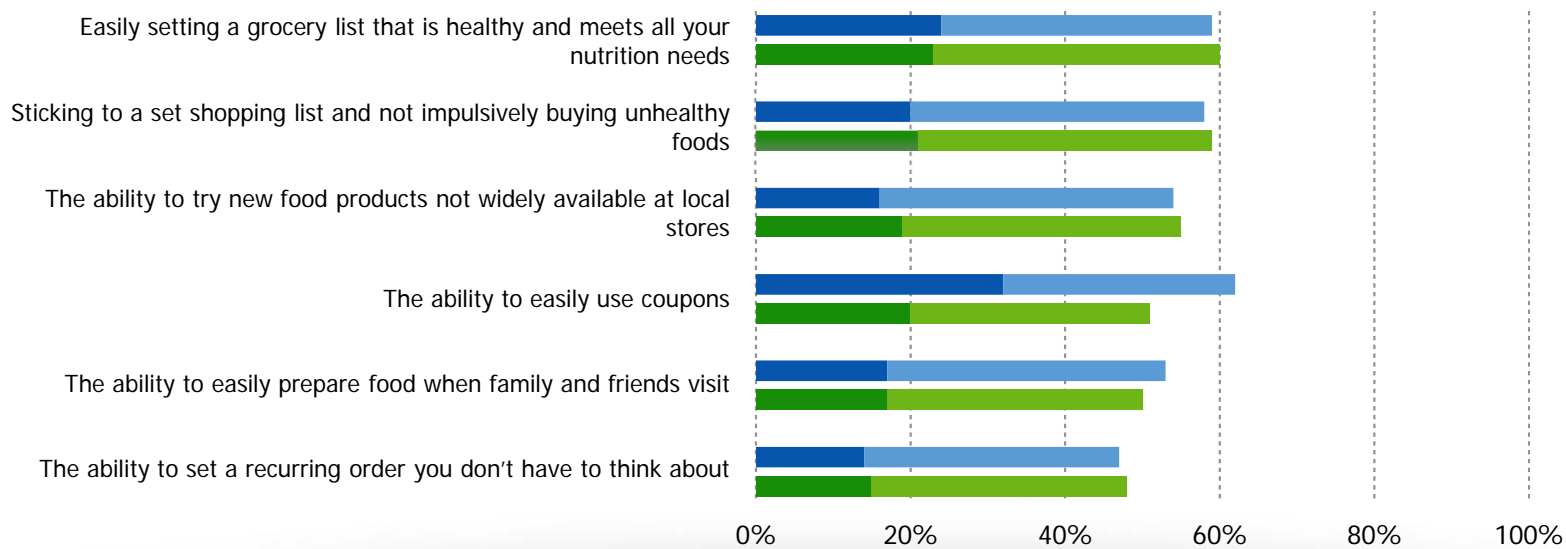
Consumers in their 50s are more likely to be motivated by many aspects including the ability to place an order when they have time, ability to take their time shopping, and the ability to try new foods.

Q27: To what extent do the following factors motivate you to order groceries to be delivered? (Not Currently Ordering n=857; Grocery Delivery n=370)

Discounts and Coupons Would Have More Significant Impact on Those Not Currently Ordering Groceries

Motivating Factors for Ordering Grocery Delivery

Not Currently Ordering: ■ Major factor ■ Minor factor
 Orders Grocery Delivery: ■ Major factor ■ Minor factor

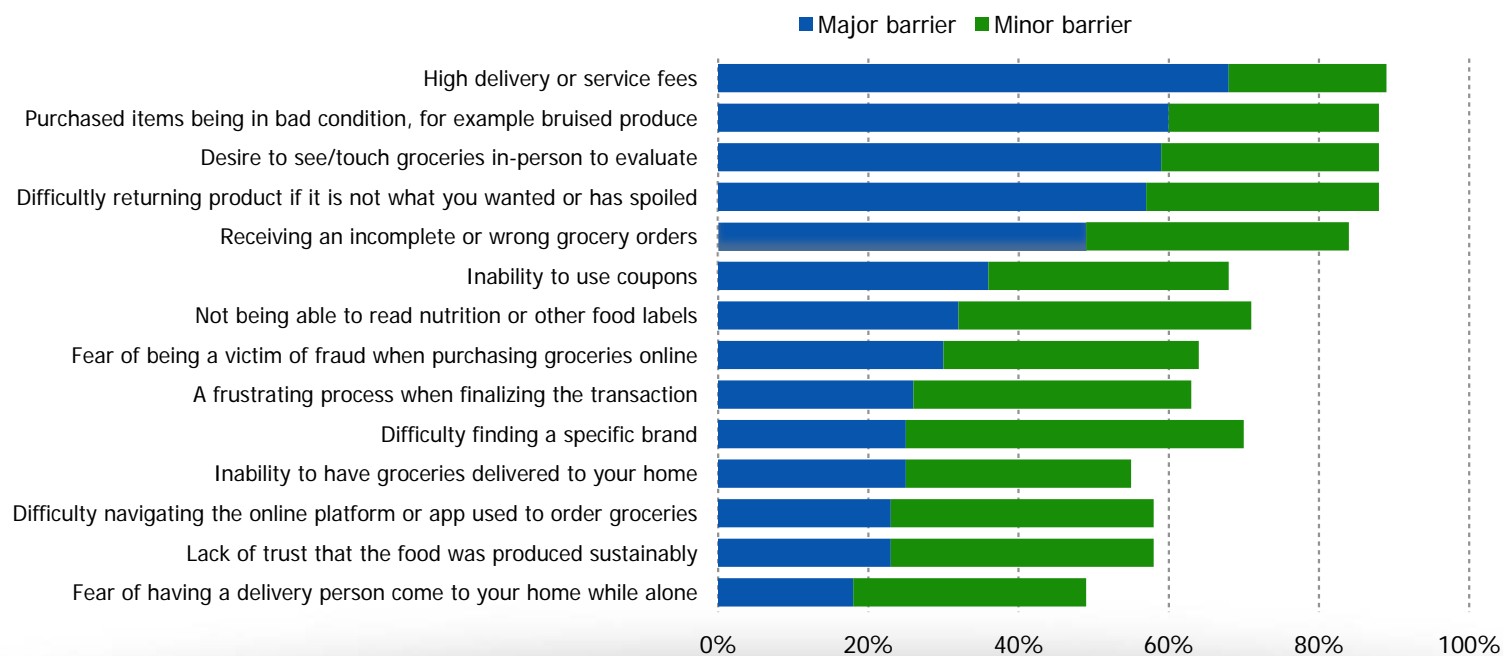


Q27: To what extent do the following factors motivate you to order groceries to be delivered? (Not Currently Ordering n=857; Grocery Delivery n=370)

High Fees Are the Top Barrier to Ordering Groceries

Lack of quality and desire to see/touch foods are also perceived as significant barriers. All barriers are higher among those not currently ordering groceries.

Barriers Preventing Ordering Groceries



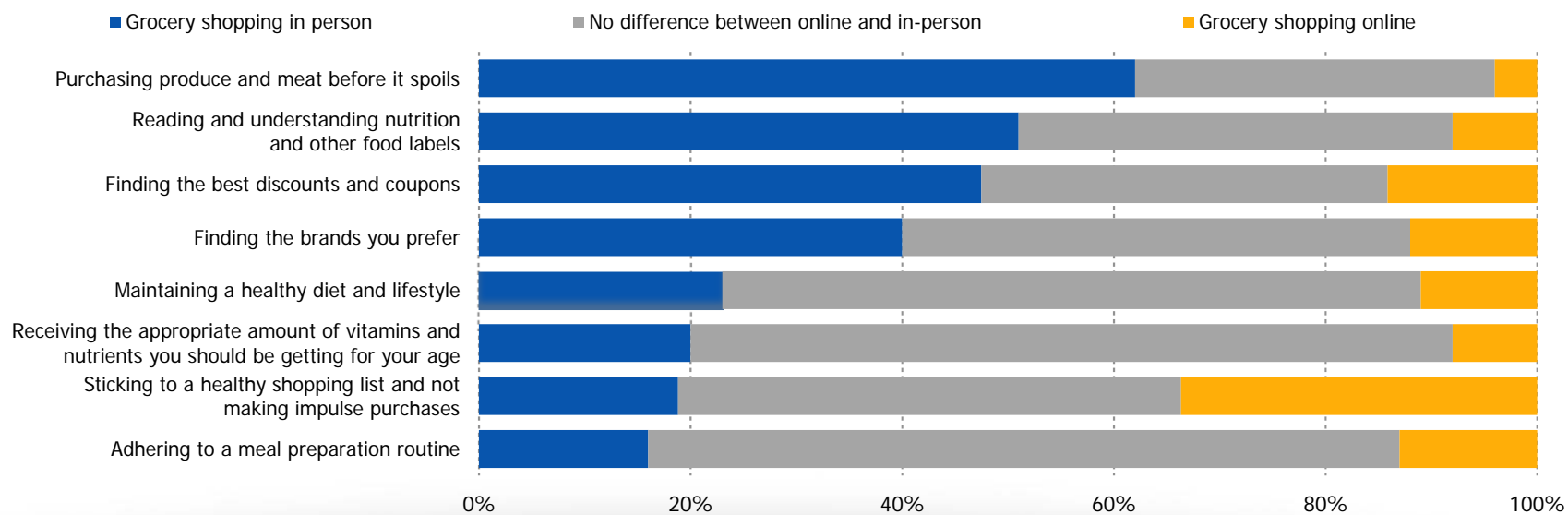
Those over age 65 are more likely than younger participants to find these concerns to be barriers.

Q28: To what extent do the following prevent you from ordering groceries to be delivered (more than you already do)? (General Population n=1,004)

Many Ordering Groceries Still See Benefits to Shopping In-Person Including Finding Quality Products and Reading Labels

That said, over one-third say it is easier to stick to a health shopping list when ordering groceries

What is Easier to do In-Person vs Online (Among those ordering groceries)

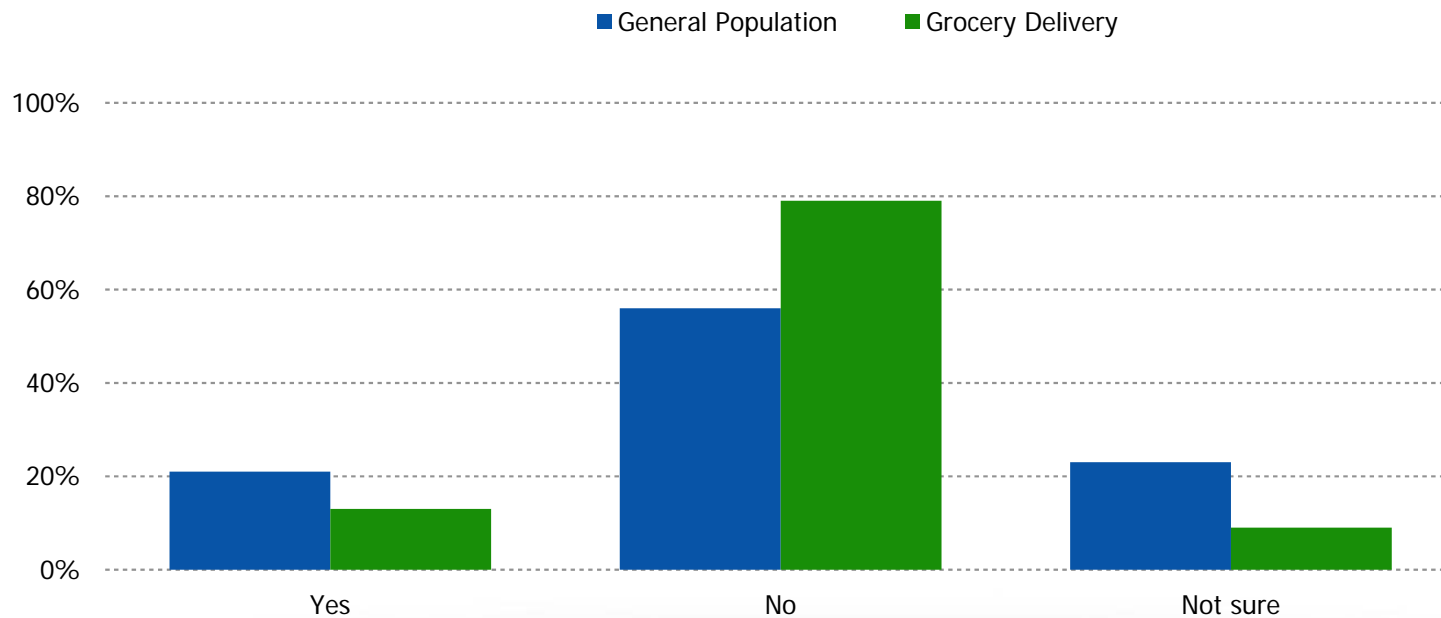


Q35: Which of the following do you think would be easier to do while grocery shopping in-person or online? (n=370)

Few Have Safety Concerns about Home Delivery

One in five older Americans have concerns about home delivery. Concern is lower among those who have actually ordered grocery delivery though.

Safety Concerns about Home Delivery

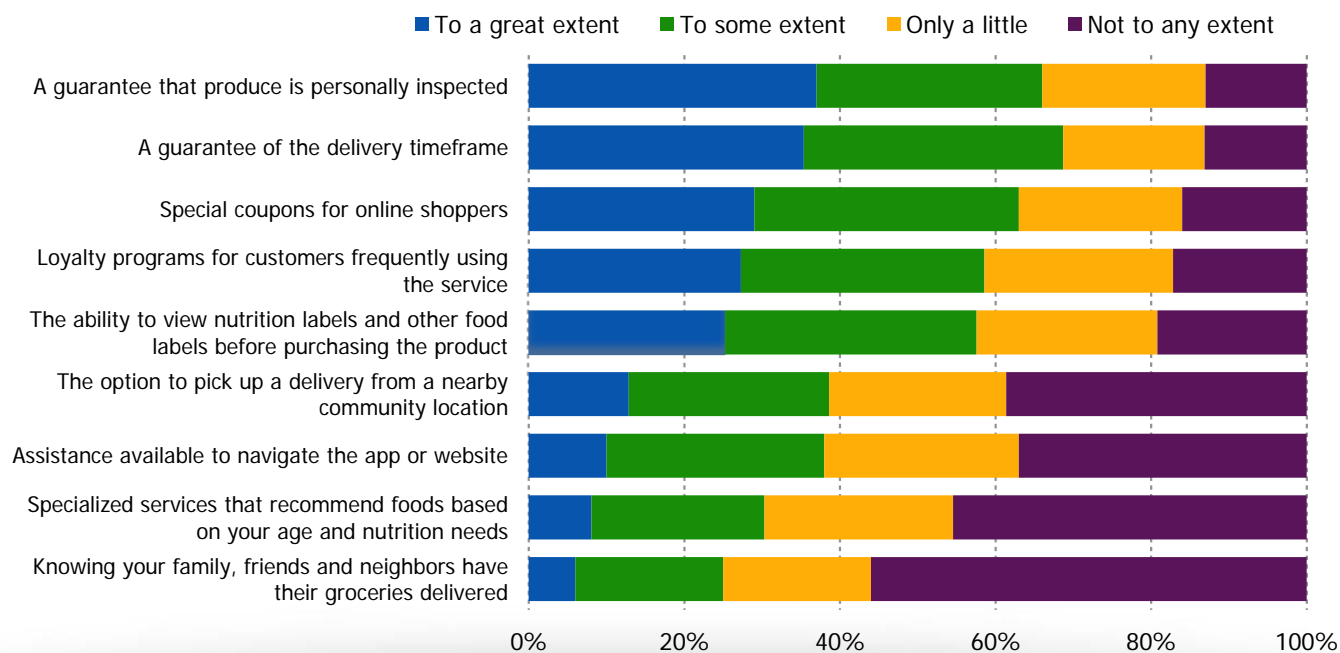


Compared to their counterparts, men (65% vs. 49%), college graduates (65% vs. 52%) and white respondents (60% vs. 46%) are less concerned.

Q36: Do you have any concerns about the safety of having a delivery arrive at your home? (General Population n=1,004; Grocery Delivery n=370)

Guaranteed Delivery Time and Personally Inspected Produce Are the Top Factors to Encourage Ordering

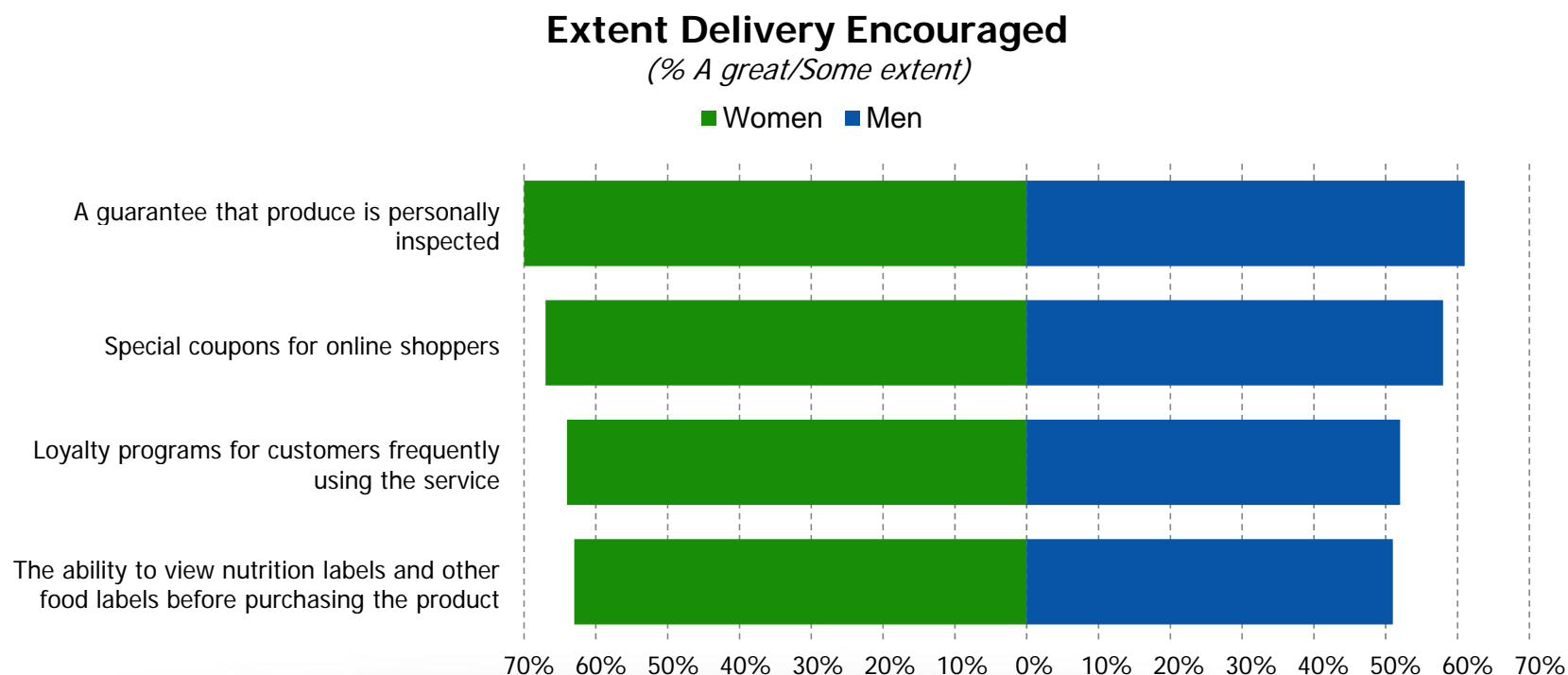
Extent Would Encourage to Order Delivery



Those with groceries delivered are more likely to be encouraged by loyalty programs (66% vs. 59%).

Q29: To what extent would the following encourage you to shop for groceries to be delivered (more frequently)? (n= 1,004)

Quality Guarantees, Coupons, Loyalty Programs and Visible Nutrition Labels Are More Likely to Motivate Women



Q29: To what extent would the following encourage you to shop for groceries to be delivered more frequently? (n= 1,004)

Thank you

For more information, please contact info@foodinsight.org

For the full report, please visit:

<http://www.foodinsight.org/older-online-shoppers>