

# WHAT MAKES CONSUMERS BUY?

When consumers browse a crowded grocery or convenience store shelf, they choose between a dizzying array of aesthetics, price points, flavors, sustainability propositions, and nutritional profiles.

To stand out, successful food products must tap into the science of shelf appeal to pinpoint the best ways to showcase quality, attract customer eyes, and ultimately earn lasting market share in a highly competitive marketplace.



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## The State of the Grocery Store Shelf

THE RIGHT PRODUCT STRATEGY IS CRITICAL IN A HIGHLY COMPETITIVE CONTEST FOR SHELF APPEAL.



### CHOICES

Grocery store shelves are more diverse than ever. The average supermarket now carries 31,704 different items.<sup>1</sup>

### TRENDS

Online purchases are growing, but physical grocery shopping remains a prime purchasing decision driver. In 2022, 80% of U.S. consumers aged 15+ did not shop for groceries online in the month before their surveying.<sup>2</sup>

### PERIMETERS

Grocery store perimeters — generally home to premium, specialty, fresh, and healthy foods — are the source of the fastest growth.

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## The Challenge of Standing Out on Today's Shelves

CONSUMERS HAVE MORE CHOICES THAN EVER BEFORE — BUT MAY BE FACING DECISION BURNOUT.



### REAL TIME CHOICES

Customers are still making choices in real time while shopping. At least 75% of consumers make some purchase decisions while in the store.<sup>3</sup>

72%

of customers walked away from a grocery purchase due to decision stress, according to 2024 data.<sup>5</sup>



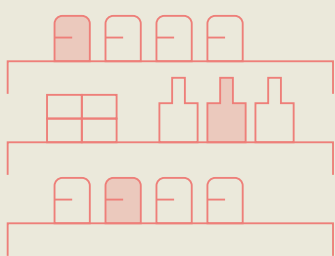
### QUICK DECISIONS

Time-constrained consumers have to make quick decisions, relying on known brands to simplify decision-making. The average consumer spends 13 seconds purchasing a brand in-store.<sup>4</sup>

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## Key Factors for Food Purchasing Decisions

TODAY'S CONSUMERS ARE USING A MORE HOLISTIC APPROACH WHEN SELECTING FOOD PRODUCTS.



### VISUALLY APPEALING PACKAGING

Transparent packaging design can add striking aesthetic appeal, or simply showcase the quality and freshness of the food inside.<sup>6</sup>

### PRODUCT SIZE

From bite-sized snacks to family-sized take-home meals, finding the right sizing for a product makes a meaningful difference in shaping purchasing decisions.<sup>7</sup>

### SUSTAINABILITY

Many consumers today see value in a product's environmental footprint as well as its culinary attributes: 60 to 70% of consumers said they would pay more for sustainable packaging.<sup>8</sup>

### FRESH AND HEALTHY OPTIONS

Consumers are eager for convenient, fresh food but need the right features to verify quality.<sup>9</sup>

### CONVENIENCE

Today's consumers are eager to save time. 52% say they value convenience now more than they did in the past.<sup>10</sup>

### ARRANGEMENT

As shelves become more crowded, arrangement will continue to play a key role in shaping product visibility for in-store consumers. The importance of placement has been consistently demonstrated by retail behavioral research.<sup>11</sup>

### PRICING

While consumers are employing a broader value calculation than in the past, they remain value-conscious. In a recent survey, three out of four shoppers were very/somewhat concerned there may be a recession in the near future.<sup>12</sup>

50% of consumers say packaged fresh food provides an attractive convenience

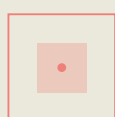
70% say the packaging is a way to prevent contamination

61% say labeled packaging is valued for helping to understand the purchase

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## Winning Food Merchandising Strategies

SHELVES MAY BE MORE COMPETITIVE THAN EVER, BUT THE RIGHT STRATEGIES CAN STILL UNLOCK A COMPETITIVE EDGE.



### SET THE STAGE FOR FAVORABLE SHELF PLACEMENT.

Stackable packaging allows for better use of shelf space and higher SKU density.



### HELP TIME-PRESSED CONSUMERS MAKE QUICK DECISIONS.

Clear labels and branding provide critical information for in-store shoppers facing crowded shelves.



### HELP SHOPPERS UNDERSTAND PRODUCT SUSTAINABILITY.

The right messaging can earn new customers while building brand loyalty to secure repeat purchases.



<sup>1</sup> FMI, "Food Retailing Industry Speaks," www.fmi.org, 2024, accessed March 10, 2025, https://www.fmi.org/our-research/research-reports/food-retailing-industry-speaks.

<sup>2</sup> Eliana Zeballos and Brandon J. Restrepo, "New Survey Data Show Online Grocery Shopping Prevalence and Frequency in the United States | Economic Research Service," Economic Research Service, February 8, 2024, accessed March 10, 2025, https://www.ers.usda.gov/amber-waves/2024/february/new-survey-data-show-online-grocery-shopping-prevalence-and-frequency-in-the-united-states.

<sup>3</sup> Online Master of Science in Applied Psychology degree, "Psychology of the Grocery Store | USC MAPP Online," Master of Science in Applied Psychology Online, November 17, 2023, accessed March 10, 2025, https://appliedpsychologydegree.usc.edu/blog/psychology-of-the-grocery-store.

<sup>4</sup> Nielsen, "Make the Most of Your Brand's 20-Second Window," July 21, 2022, accessed March 10, 2025, https://www.nielsen.com/insights/2015/make-the-most-of-your-brands-20-second-window/.

<sup>5</sup> Laurent Thoumine, "Transforming Grocery Shopping Experience," Accenture, December 13, 2024, accessed March 10, 2025, https://www.accenture.com/us-en/blogs/retail/from-chaos-to-convenience.

<sup>6</sup> Simmonds, Gregory, Andy T. Woods, and Charles Spence, "Show Me the Goods: Assessing the Effectiveness of Transparent Packaging Vs. Product Imagery on Product Evaluation," Food Quality and Preference 63, (2018): 18-27, accessed March 10, 2025, https://doi.org/10.1016/j.foodqual.2017.07.015.

<sup>7</sup> Liang, Shichang, Ling Qin, Min Zhang, Yuxuan Chu, Lili Teng, and Lingling He, "Win Big with Small: The Influence of Organic Food Packaging Size on Purchase Intention," Foods 11, no. 16 (2022): 2494, accessed March 10, 2025, https://doi.org/10.3390/foods11162494.

<sup>8</sup> David Feber et al., "Sustainability in Packaging: Inside the Minds of US Consumers," McKinsey & Company, October 21, 2020, accessed March 10, 2025, https://www.mckinsey.com/industries/packaging-and-paper/our-insights/sustainability-in-packaging-inside-the-minds-of-us-consumers.

<sup>9</sup> Daniel Edsall et al., "A Fresh (Food) Take on Grocery Convenience," Deloitte Insights, September 10, 2024, accessed March 10, 2025, https://www2.deloitte.com/us/en/insights/industry/retail-distribution/grocers-must-work-toward-more-convenient-fresh-food.html.

<sup>10</sup> Edsall et al., "A Fresh (Food) Take on Grocery Convenience."

<sup>11</sup> Sigurdsson, Valdimar, Hugli Saevarsson, and Gordon Foxall, "Brand Placement and Consumer Choice: An In-Store Experiment," Journal of Applied Behavior Analysis 42, no. 3 741, accessed March 10, 2025, https://doi.org/10.1901/jaba.2009.42-741.

<sup>12</sup> "Dairy, Deli and Bakery Trends Recap of January 2025," IDDBA, January 2025, accessed March 10, 2025, https://www.iddba.org/trendcenter/trends-research/monthly-category-updates/current/dairy-deli-bakery-trends-recap-january-2025.