

# TODAY'S PRIMARY SHOPPER



**Society may be  
radically changing  
but women still  
dominate the  
marketplace**

Based on an exclusive survey of shopping attitudes  
by GfK Custom Research North America for PLMA

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PLMA CONSUMER RESEARCH STUDY



## EXECUTIVE SUMMARY

For more than three decades, women in America have been striving to have it all – education, career, family – and many have succeeded. But what has been the impact on day-to-day activities like shopping? And what about those women who have concentrated on family: Don't they count, too? So how do today's women shop? Is it really different now from the 1950's, when television's June Cleaver, the conscientious mother on *Leave It To Beaver*, spent her days in the kitchen? Has the new woman of the 21st century changed things? Should retailers be doing something different to accommodate a new kind of female shopper?

With store brands playing a strategic role in retailing, PLMA commissioned GfK Custom Research North America to conduct a nationwide survey to determine the extent to which the role of women has shifted when it comes to household duties. The importance of validating such shifting is clear. If women are less involved in shopping, cooking and other chores, there would be significant implications for the marketing strategies of U.S. retail chains and their store brand suppliers. This is particularly true in light of recent studies that claim American men are taking on an expanded role in such tasks.

The PLMA-sponsored study is significant in two important ways. First, the sample size – more than 1,000 women – is substantial, twice the number in many such polls. Second, the sample is highly selective. All of the women in the study were pre-qualified as the primary grocery shopper for their household.

The study inquired into the habits of women when they do grocery shopping, meal preparation, and other household tasks. Questions included: Do you make a shopping list? ...clip coupons? ...look for deals? ...get ideas for meals? ...consider other brands? ...browse the aisles?; importantly, How long do you stay in the store? ...how quickly do you want to get out? Other questions sought to find out who prepares the family meals, does the laundry, cleans the house, stocks the medicine cabinet, mows the lawn and tends to household repairs.

The study reveals that the role of women has not changed in many ways. Two thirds or more of the 1,000 women in the study say they handle the bulk of the grocery shopping for the family, are most often the exclusive preparer of meals, clean the house, do the laundry, stock the medicine cabinet and shop for family needs other than food.

Outside the home, women now account for a third of the nation's lawyers and doctors and about half of the labor force. Seven in ten say they work out of economic necessity and four in ten are sole providers for their households. One magazine predicted that based on present trends, by the next generation, more families will be supported by women than by men. Indeed, women now make up almost 60% of college students and earn the majority of doctorates and master's degrees.

### **Responsibilities of the home are strong**

The PLMA survey indicates that women's workloads and duties have not lightened much through the years. They continue to tackle the homemaking jobs at hand. It shows: They are diligent, patient and frugal shoppers; they do extensive meal preparation, and get less help from other members of the household in carrying out their shopping, cooking and other tasks, such as doing the laundry, cleaning the house and stocking the medicine cabinet. They take a great deal of time in the store and are quite willing to prepare a shopping list, clip coupons, and browse.

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Two thirds of women say they handle the bulk of the grocery shopping. Three quarters of them make a shopping list. Fifty three percent clip coupons and watch for specials on items they need.

While a majority of women in the study also say they want to get in and out of the store by completing their shopping as quickly as possible, they are willing to spend time in the store; nearly six in ten spend an hour or more shopping, and only one in four claim they rarely have enough time to get their shopping done.

More than half of those surveyed manage to find time while they shop to browse the store and look for unadvertised deals and items that are on sale; to compare prices on the items they need and try to choose the brand, size, or the item on sale that saves the most money; to look for products beyond those they intended to buy when they entered the store; and to get new ideas for meals and menus while browsing the aisles.

## **Women still rule in the kitchen**

Women remain in charge of the kitchen as well. Eighty four percent say they are most often the sole preparer of meals for the household. Only fifteen percent of women say that someone else in the household – a spouse, cohabitating adult, parent, child, or another – is most often responsible for meal preparation. Sixty one percent of women prepare at least five meals a week at home.

Sixty four percent often make a meal using fresh ingredients. Thirty percent often order food in or pick up takeout meals to serve at home. Sixty one percent often put a meal together from packages or canned goods. More than half often build a meal around items from the store's freezer or refrigerated cases; and nearly a third often bring home a ready-made or heat and serve a meal from the store.

Women's predominant role extends to other housekeeping tasks. A large percentage of women in the study are principally responsible for doing the laundry, cleaning the house, and stocking the family medicine cabinet with health and beauty products and over-the-counter medicines.

In cleaning the house, seven in ten of the women in the study claim that's their job exclusively. Help from another adult member of the household is provided to only one in ten of women. More than three fourths of women say they are the principal doers of the laundry in their home; practically none get help in the laundry room.

Eight in ten say they are responsible for stocking the medicine cabinet. Only five percent get assistance. Women are also in charge of shopping for family needs other than groceries. Three in four say they perform that function; fewer than one in ten get assistance.

They are also savvy shoppers: Forty-five percent of the women in the PLMA study say they are frequent purchasers of store brands. The degree of store brand purchase rises sharply to nearly nine in ten when frequent and occasional purchasers of store brands are aggregated. A scant three percent say they never buy store brands.

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## SURVEY RESULTS AND COMMENTARY

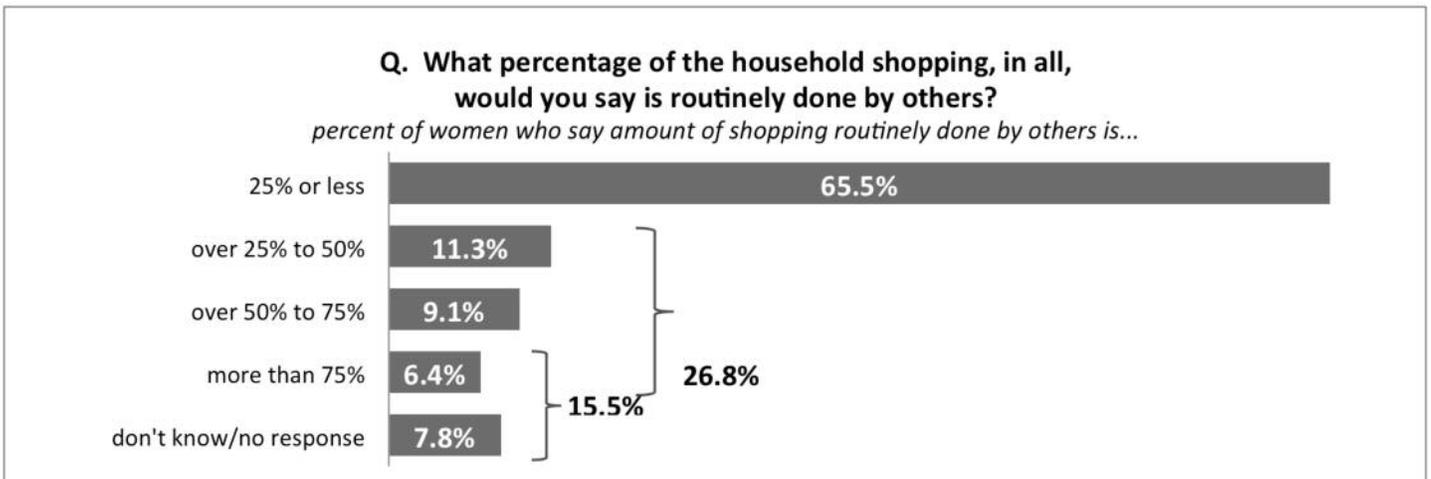
### Women are doing more than ever.

In the wake of personal and professional advances across the board, women are able to do as much as they ever did. All things considered, and judging by the results of the PLMA survey, they are in fact doing more.

As for today's young women, they may be just as likely to be both traditional homemakers as well as catch the commuter train to the city and work late at the office. Whatever their daily guise, they still mind the home much as June Cleaver did, finding time, somehow, to shop, cook, clean and launder.

### Women still do most of the routine grocery shopping for U.S. households.

The study found that women for the most part continue to take on the greatest share of the responsibility when it comes to the routine shopping for groceries. Three out of four women do more than half the shopping for their households, while two out of three do 75% or more of the shopping. Only about one in four women indicate they get significant help with the shopping from others on a routine basis, while just 15.5% say that others contribute as much as they do or more to the household shopping.



#### *Notes on the survey methodology:*

*Results were compiled from two consecutive waves of GfK's Omnitel survey fielded on 10/5-7 and 10/12-14, 2012. In order to identify primary grocery shoppers, participants were asked "Are you or is someone else in the household the person who does most of the shopping for groceries and household items?" Only those who responded either "self" or "self and someone else" were questioned further to reach a total of 1,002 female respondents.*

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PLMA CONSUMER RESEARCH STUDY



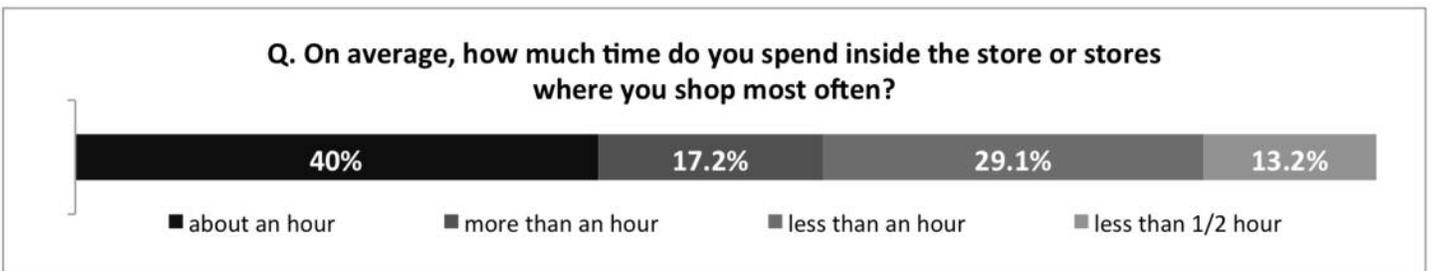
## For most, the shopping routine for groceries now includes regular visits to three or more competing formats in addition to supermarkets.

Supermarkets are still the destination of choice, receiving the most patronage among women when they shop for groceries. Nine out of ten who responded to the survey say they visit a supermarket on a routine basis. But unlike the days of June Cleaver, it's become clear that women are now relying on a range of different store types – with frequency of at least a few times per month – to get the job done.



## Four out of five women say they spend an hour or less time on average in the stores they frequent.

Among the women surveyed, the largest group, forty percent, said they average “about an hour” inside the stores when they shop, while only seventeen percent take longer than an hour inside the store.



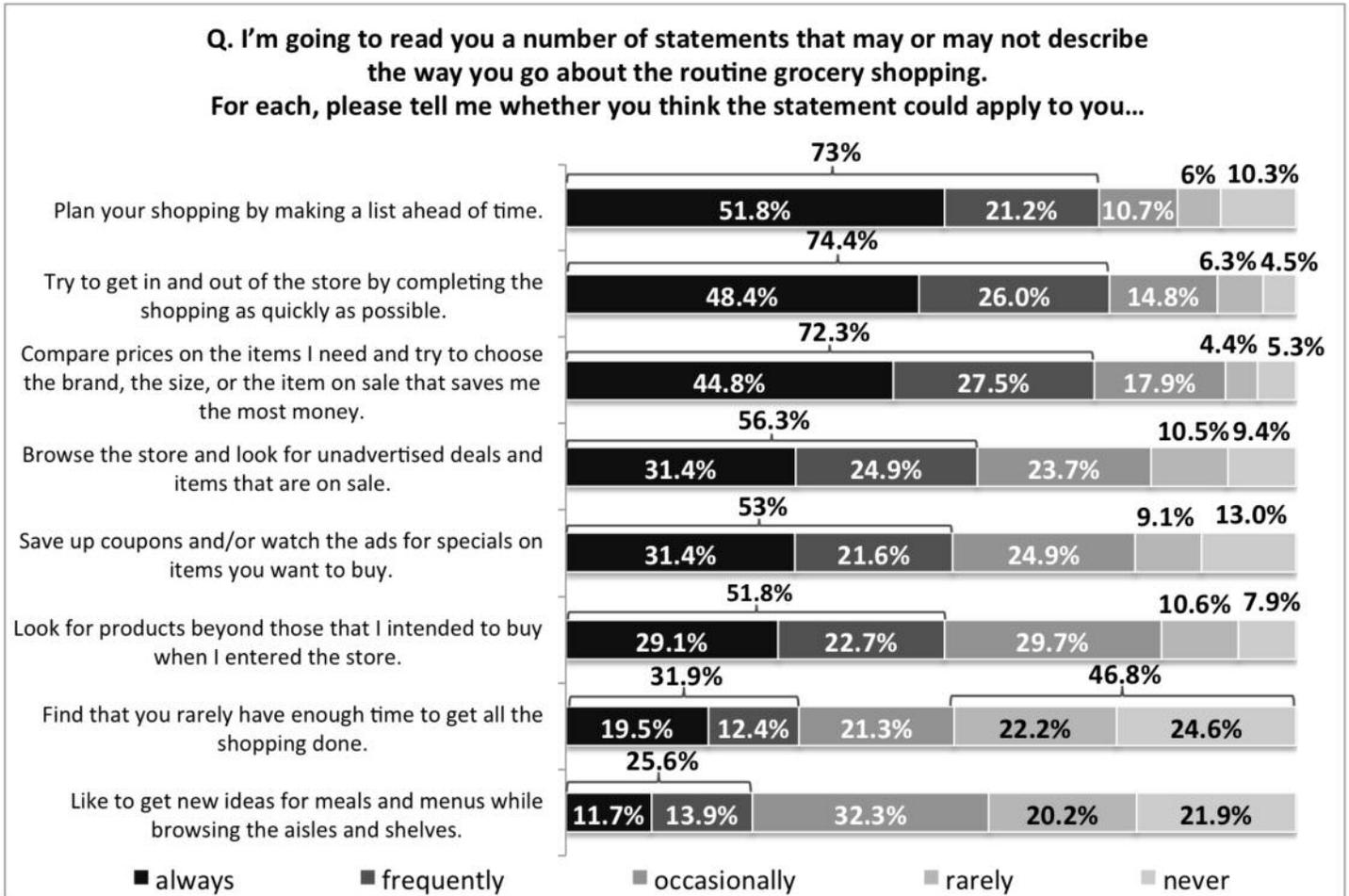
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## Breaking down the shopping routines, the grocery list still rules, but there still are multiple opportunities for marketers to influence what's purchased.

Between time-saving efforts, saving money and browsing, it's a matter of finding balance or making trade-offs between sometimes competing objectives for women who shop. Overwhelmingly, they say they plan ahead and try to get in and out of the store as quickly as they can; however, they are about equally as likely to take the time to compare prices and products if it helps them to choose the item, brand or size that will save them money.



In addition to emphasizing convenience and new ways for shoppers to save time, there are clear opportunities to influence what women buy at various points, both before and after she enters the store. Of obvious interest are those behaviors that women embrace to save money. Fifty three percent say they collect coupons “always” or “frequently,” and keep a lookout for deals and sales on items they need. A solid majority (56%) say they browse the aisles of the store as often to find items on sale, while 52% admit to looking for items beyond those they planned to buy.

After price and promotion, the study also seemed to validate efforts on the part of marketers and retailers to offer recipes and menu ideas in the store. Nearly six out of ten women say that getting new ideas for menus and meal planning while they shop was of at least “occasional” interest to them, and one in four say they do this always or frequently.

# TODAY'S PRIMARY SHOPPER

PLMA CONSUMER RESEARCH STUDY



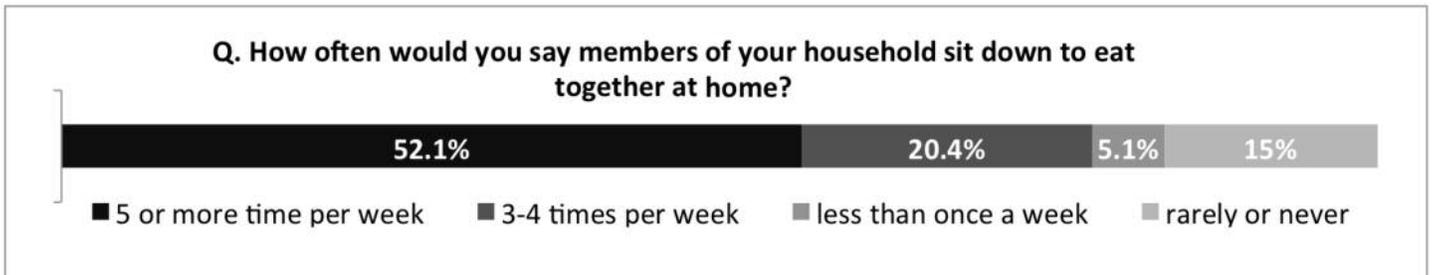
## The percentage of those who describe themselves as frequent purchasers of store brands has reached 44.7 percent.

Most primary shoppers – about 87% – say they purchase store brands occasionally or more often, with about 45% saying they do so frequently, and only 13% saying they rarely or never buy the products. Among those in the study who described their occupation as “homemaker” the number who buy store brands frequently rises to 48.4%.



## Nearly three out of four households dine together at home on a regular basis. More than half of households in the survey do so five times a week or more.

Though taking meals together at home is almost certainly much less a daily occurrence than it was in the past, it nevertheless appears to be a more common practice today than some might think. By a large majority (72.5%) the women who were surveyed say their households eat at home at least three times a week. As a point of comparison, about four out of five self-described homemakers say their households dine together as often.



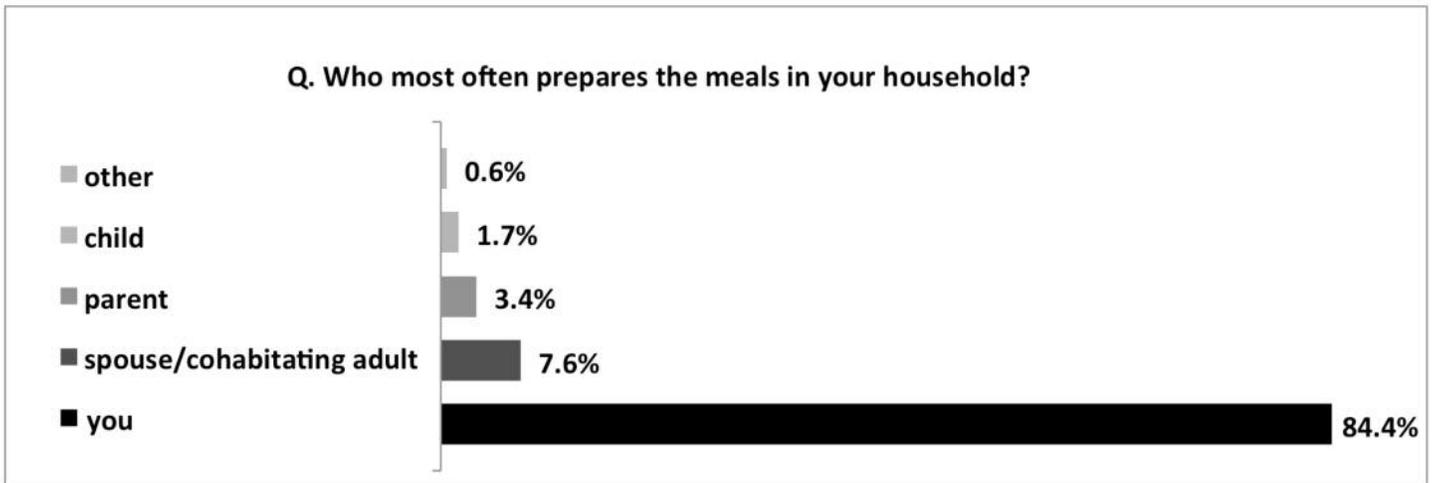
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PLMA CONSUMER RESEARCH STUDY



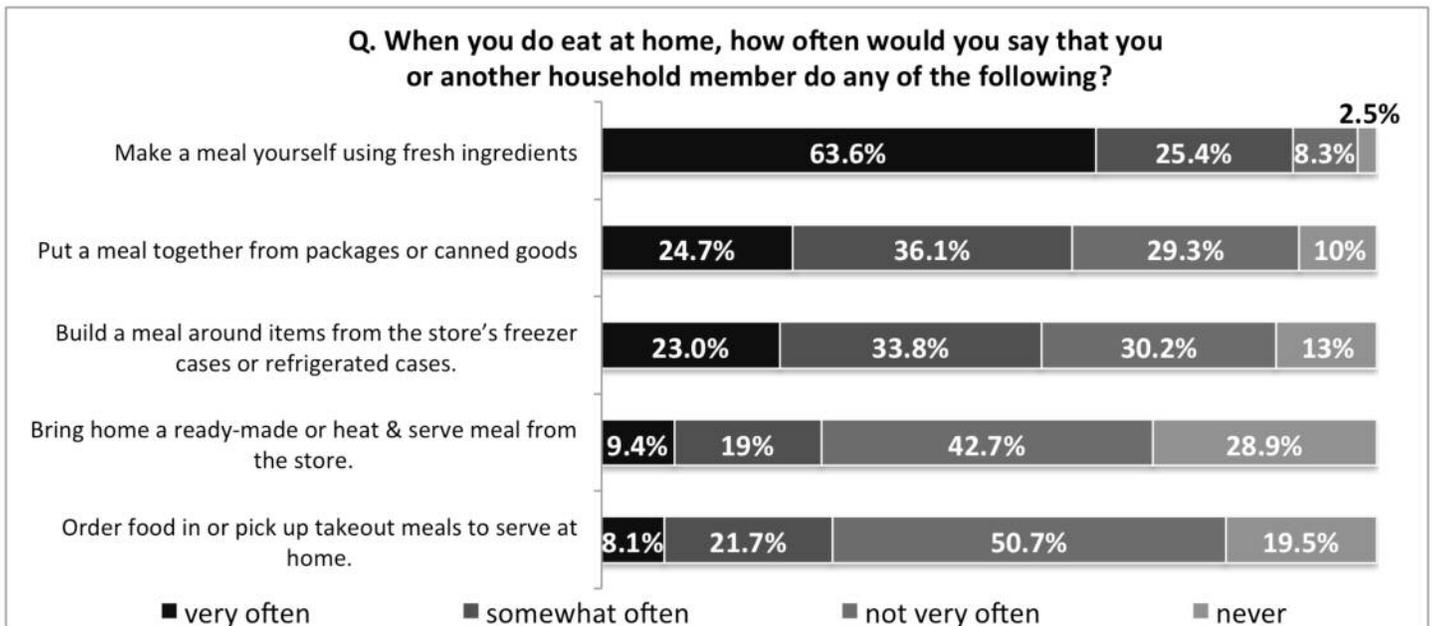
## Overwhelmingly, it's still the woman of the household who's responsible for making the meals.

Whether they work as homemakers or have a career outside the home, by a huge margin the women in the study say that the task of making meals for the household falls to them. In fact there was only a five point spread between all women and self-described homemakers in the study, of whom 89.4% are meal preparers.



## Meal preparation can and does involve a variety of options and choices, but making a meal from fresh ingredients is favored, by far, over both packaged foods and the convenience of take-away.

When asked about the various ways available to them for bringing food to the table, the women who say they most often make the meals themselves from fresh or raw ingredients were the majority. The make-it-from scratch option won out handily over all other meal possibilities offered, though it's also clear that packaged, frozen and refrigerated foods are a part of the equation for a significant proportion of meal occasions. Short cuts such as ordering from restaurants or heating a ready-made meal from the store fared less well.



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PLMA CONSUMER RESEARCH STUDY



**As for frequency, more than four out of five women say they regularly prepare meals at home – a minimum of three times every week ... and three of those four do so a minimum of five times a week.**



**Despite modern lifestyle changes and responsibilities outside the home, more traditional housekeeping roles still fall squarely on women.**

In addition to shopping for the household groceries and preparing the meals, today's women say they are also the ones who take on the greatest share of responsibility for most of the chores that are necessary to keep a household going. In fact, fewer than 30% say they can count on any help at all with the cleaning, the laundry or shopping for non-grocery needs, including medicines. The division of labor only favors help from others when it comes to doing outdoor work and repairs around the house.



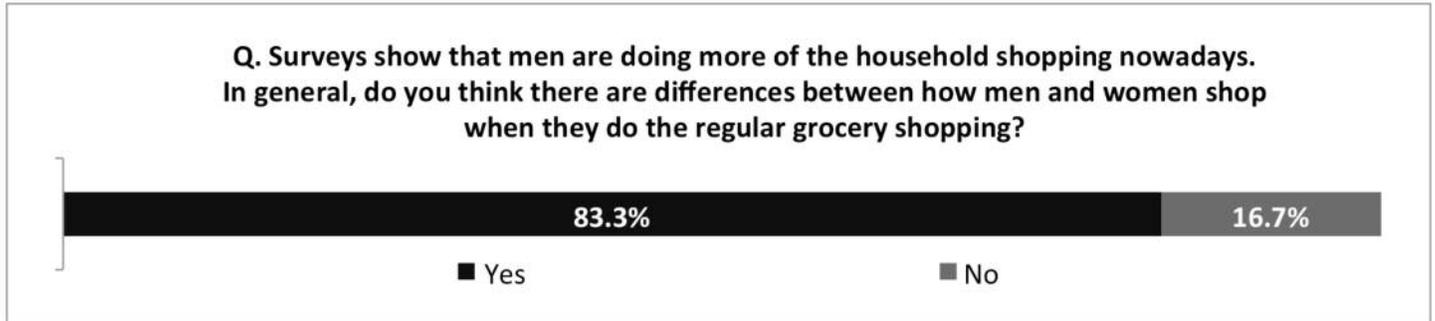
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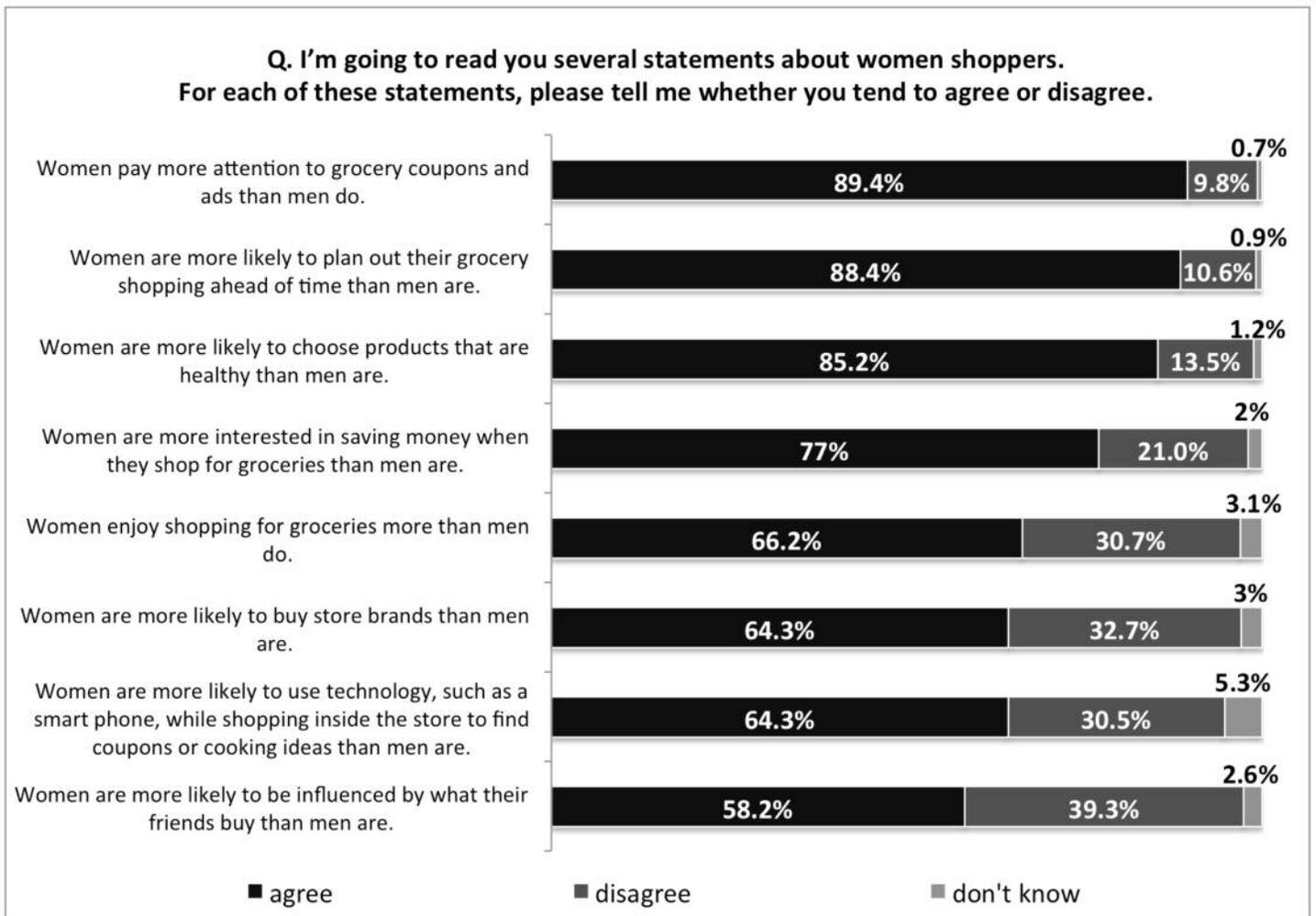


## Overwhelmingly, women believe that men and women behave differently when it comes to shopping for groceries.

To learn about how women see themselves as shoppers, they were first asked to say whether they think there's a difference between how men shop versus how women shop.



## In particular, women believe they are superior when it comes to managing the household shopping, with an emphasis on health and value.



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By large majorities, women shoppers view themselves as more focused than men are on behaviors that relate to economizing, shopping efficiency, rationality and health. That they are generally more interested in saving money – as 77% believe – is consistent with their view that women pay more attention to ads and coupons (89%) and are more likely to plan ahead (88%). Additionally, two out of three feel that women enjoy shopping more than men do.

## On virtually all points, women see men as the less proficient shoppers.

In the opinion of the women surveyed, men are generally seen as more interested in expediency, less careful, less curious, and more creatures of habit than women are when it comes to shopping.

