2025 Shopper Satisfaction Report

In today's rapidly evolving retail landscape, one thing remains constant: the power of the shopper. Understand shopper satisfaction has never been more important as behaviors shift and expectations rise. Research consistently shows that satisfied shoppers are not just loyal; they are advocates who amplify sales and growth by recommending retailers and brands to others. Yet, despite its importance, many organizations still lack a clear understanding of how their shoppers truly feel.

As Steve Jobs said, "*Customers don't measure you on how hard you tried; they measure you on what you deliver*." In the world of Yelp reviews and social media, a dissatisfied shopper's voice can carry far and wide, impacting reputations and revenues alike. The question we must ask ourselves is: Are we truly listening?

At Shopper Intelligence, we believe that measuring satisfaction is the first step toward meaningful improvement. Karl Pearson, a pioneer in statistics, famously noted, "*When performance is measured, performance improves. When performance is measured and reported back, the rate of improvement accelerates*." By understanding and tracking shopper satisfaction, we uncover the "what" and "why" behind shopping behaviors and, as importantly, empower businesses to adapt and thrive in an increasingly competitive market.

This report is your guide to the current state of shopper satisfaction. It's an invitation to delve into the metrics that matter, see how your categories and retailers measure up, and explore actionable insights that drive growth.

The stakes are high, but the opportunities are endless for those willing to listen and respond.

Jason Smith, Shopper Intelligence

Our Research

Since 2020, Shopper Intelligence has surveyed over 650,000 U.S. shoppers across more than 50 retailers and 120 categories. In 2024, we collected insights from more than 160,000 shoppers, including 50,000 online shoppers and 110,000 brick-and-mortar shoppers.

SHOPPER SATISFACTION 2025: EXECUTIVE SUMMARY

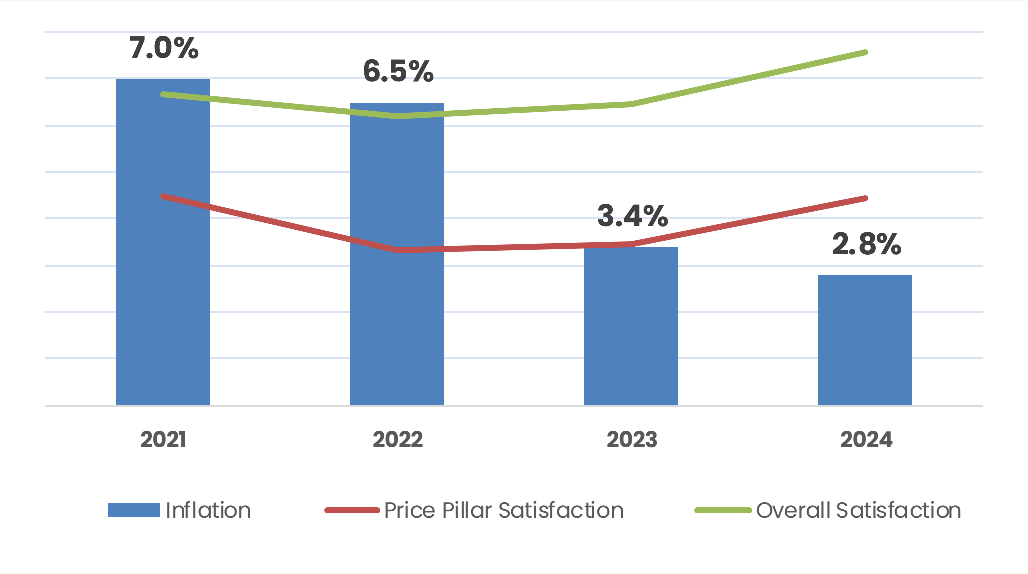
Overall Satisfaction Higher But Pricing Lagging Behind Other Levers

Overall shopper satisfaction is at its highest level in four years with strong advances in Assortment & Execution. However, pricing satisfaction has not kept pace.

Over the past four years, inflation and shifting economic conditions have significantly influenced shopper behavior. While stimulus checks in 2021 helped cushion the impact of rising prices, ongoing inflation in 2022 led to lower satisfaction in 2022 and 2023.

While shoppers have adjusted to higher prices and satisfaction levels returned to those seen in 2021, price satisfaction still lags significantly behind overall satisfaction.

4 Yr Trend – Inflation, Overall Satisfaction & Price Pillar Satisfaction



Inflation Data Source: U.S. Bureau of Labor Statistics

SHOPPER SATISFACTION 2025: RETAILER RANKINGS

Shopper Intelligence

Among retailers, ShopRite, Costco and Amazon each ranked #1 in Overall Satisfaction compared to their peers.

Grocery Brick & Mortar

Rank	Retailer
1	ShopRite
2	H-E-B
3	Publix

Non-Grocery Brick & Mortar

Rank	Retailer
1	Costco Wholesale
2	sam's club
3	Target

Online

Rank	Retailer
1	amazon
2	Target
3	Costco Wholesale

ShopRite had the highest overall satisfaction for Grocery/Brick & Mortar Retailers. Other mid-sized regional grocery retailers performed well, especially around Execution & Assortment levers.

Costco was the top Non-Grocery Retailers, renowned for its strong value proposition, and ease of shop. Shoppers like its high quality, fresh offerings and store experience. It ranked lower for Assortment, driven by lower scores for breadth, innovation and brand availability.

Within the online landscape, **Amazon** is the undisputed leader in Overall Satisfaction. Its intuitive platform, unmatched product availability, and efficient delivery network set it apart from competitors.

SHOPPER SATISFACTION 2025:
EXECUTIVE SUMMARY

The Shopper Intelligence Overall Satisfaction measure provides a holistic view of shopper sentiment by integrating weighted scores across all four pillars: **Price**, **Product**, **Assortment**, and **Execution**. By accounting for the relative importance of individual levers within each pillar, this metric offers a comprehensive measure of retailer and category performance.

Here is what we found within each pillar:

PRICE

Delivering Value and Offers is key

The Price Pillar benefited from perceived improvements in delivering value and consistent pricing strategies, resonating with shopper expectations. Although price and promotional offers remained stable, there is still potential to build on these foundations to enhance shopper loyalty.

PRODUCT

Focus on Quality & Freshness but Differentiate in Premium

The Product Pillar saw consistent high performance in freshness and quality, underscoring the importance of delivering superior products. However, areas like noticeably better premium products, natural and organic offerings, as well as healthy choices, indicate room for growth.

ASSORTMENT

Breadth of Assortment is better but Innovation a challenge

In the Assortment Pillar, satisfaction was driven by strong performance in offering a wide range of products and well-known brands. The ability to highlight innovation continues to be a challenge. Retailers that prioritized diverse and recognizable assortments performed particularly well.

EXECUTION

Out of Stocks improve but Shopping Enjoyment lagging behind

Within the Execution Pillar, improvements in inventory management and clear navigation significantly contributed to the overall increase in satisfaction. Shoppers appreciated fewer out-of-stock situations and more intuitive shopping experiences. However, areas such as staff/online support and creating engaging shopping atmospheres are opportunities for growth, with noticeable gaps in customer service and store engagement.

The **Price Pillar** measures how shoppers perceive value in pricing across categories, focusing on four levers: **Prices**, **Offers**, **EDLP,** and **Best Value**. This section explores price satisfaction among key retailers and identifies the categories where shoppers feel they are getting the most value.

PRICE STILL REMAINS THE LOWEST SCORING PILLAR

Despite the positive movement, price satisfaction remains the lowest scoring pillar. It highlights the ongoing need for retailers to optimize their pricing strategies.

The slight recovery in satisfaction suggests that shoppers are beginning to recognize improvements in value offerings and pricing transparency. Enhancing satisfaction in the EDLP and Promo Offers levers offer the greatest opportunity for improvement.

Within the Price Pillar, **ShopRite** and **Costco** continue to lead the way in Brick & Mortar. Costco's consistent focus on delivering value through bulk pricing and EDLP strategies has contributed to its sustained top position.

Costco and **Target** performed well in the online space, demonstrating that a combination of competitive pricing and strong promotional offers resonate with shoppers.

Top Retailers for Price Satisfaction:

Grocery Brick & Mortar

Rank	Retailer
1	ShopRite
2	H-E-B
3	Meijer

Non-Grocery Brick & Mortar

Rank	Retailer
1	Costco
2	Sam's Club
3	Dollar General

Online

Rank	Retailer
1	Costco
2	Target
3	Amazon

PRICE SATISFACTION

TOP PRICE PILLAR LEVERS

PRICES:

Costco and Dollar General are the top performing retailers for the "Great Prices" lever. Both retailers have consistently ranked high due to their ability to offer competitive prices and communicate value effectively.

OFFERS:

ShopRite, Target, and CVS excelled in the "Good Special Offers" lever. Their personalized promotional strategies and frequent deals resonate well with shoppers, particularly in categories with high promotional sensitivity.

CATEGORY HIGHLIGHT - FOOD CATEGORIES FARE BETTER IN PRICE

Key food categories have consistently ranked high in terms of shopper price satisfaction. **Frozen Vegetables** claimed the top position among categories for price satisfaction, demonstrating a major increase in shopper perception of value. This category reflects the importance of staple goods in shaping overall satisfaction. **White & Rosé Wine** & **Red Wine** maintained a top-three ranking, indicating that pricing in premium beverage categories continues to resonate well with shoppers.

Overall, categories that ranked highly in price satisfaction were essential and everyday focused. Retailers that emphasize value in staple and high-frequency purchase categories are likely to see sustained improvements in shopper satisfaction.

TOP CATEGORIES FOR PRICE SATISFACTION

RANK	CATEGORIES	RANK	CATEGORIES
1	Frozen Vegetables	6	Side Dishes
2	White & Rosé Wine	7	Canned & Jarred Vegetables
3	Red Wine	8	Dry Pasta
4	Vitamins & Minerals	9	Yogurt
5	Fresh Seafood	10	Cosmetics - Lips

PRODUCT SATISFACTION

The Product Pillar evaluates how well retailers and categories meet shopper expectations in delivering **high-quality, diverse, and ethically produced products.**

Product Pillar includes seven levers: **Natural/Organic, USA Made, Environmental, Fresh, Healthy Choices, Premium,** and **Quality.** In this section, we will showcase key retailers' product satisfaction levels and identify the category where shoppers express the most satisfaction.

PRODUCT SATISFACTION CAN BE PATCHY

Product satisfaction scores have steadily improved, reflecting growing retailer efforts to meet shopper expectations for product quality, freshness and the availability of premium and natural/organic options. However, levers such as Environmental and Natural/Organic are key opportunities for improvement across the retail landscape.

Publix

Publix led the Product rankings for grocery retailers in 2024, excelling in providing healthy choices and natural/organic options that resonate with health-conscious shoppers. The focus on fresh and premium products cements its position.

Costco Wholesale

Costco solidified its position as the top performing non-grocery brick-and-mortar retailer in the Product Pillar, driven with its ability to deliver high-quality products across key categories.

Top Retailers for Product Satisfaction:

Grocery Brick & Mortar

Rank	Retailer
1	**Publix**
2	**ShopRite**
3	**H-E-B**

Rank	Retailer
1	**Costco**
2	**Target**
3	**Sam's Club**

Online

Rank	Retailer
1	**Amazon**
2	**Target**
3	**Costco**

PRODUCT SATISFACTION

TOP PRODUCT PILLAR LEVERS

QUALITY

Costco and Publix deliver exceptional product quality, consistently meeting shopper expectations. Quality remains a foundational driver of shopper satisfaction. Retailers investing in product consistency and premium offerings continue to outperform competitors.

FRESHNESS:

Publix and ShopRite lead in delivering fresh products that resonate with shoppers. Expanding partnerships with local producers and ensuring freshness standards can further boost satisfaction.

CATEGORY HIGHLIGHT - TOP CATEGORIES FOR PRODUCT SATISFACTION

Categories at the top of the 2024 rankings excelled in the Product levers, resonating strongly with shopper expectations. **Yogurt** leads the rankings, driven by its high scores in quality, freshness, and health-conscious options. **Fresh Seafood** follows closely, reflecting shopper priorities for freshness and premium quality. High satisfaction in environmental and sustainability levers also contributes to its strong performance.

TOP CATEGORIES FOR PRODUCT SATISFACTION

RANK	CATEGORIES	RANK	CATEGORIES
1	Yogurt	6	Prepackaged Bread
2	Fresh Seafood	7	Refrigerated Juices & Drinks
3	Fresh Meat	8	Frozen Vegetables
4	Fresh Vegetables	9	Specialty Cheese
5	Fresh Fruit	10	Snack Nuts

ASSORTMENT SATISFACTION

The Assortment Pillar evaluates how well retailers meet shopper expectations regarding **Brand** availability, **Innovation**, and Assortment breadth (**Range**) within categories.

ASSORTMENT SATISFACTION IS RELATIVELY HIGH

The Assortment Pillar has shown an upward trend in shopper satisfaction from 2023 and consistently demonstrates the highest satisfaction of all the pillars. This growth highlights the importance of assortment variety and innovation as differentiators in the retail landscape.

Among grocery retailers, **Publix** and **ShopRite** led the rankings for assortment satisfaction in 2024, driven by Brand availability and Assortment breath.

Of all the levers, Innovation is the most challenging lever for shopper satisfaction. It offers the most room for improvement for **Kroger** and **Walgreens** in particular.

Top Retailers for Assortment Satisfaction:

Grocery Brick & Mortar

Rank	Retailer
1	**Publix**
2	**ShopRite**
3	**Meijer**

Non-Grocery Brick & Mortar

Rank	Retailer
1	**Target**
2	**Walmart**
3	**Costco**

Online

Rank	Retailer
1	**Amazon**
2	**Walmart**
3	**Target**

ASSORTMENT SATISFACTION

TOP LEVERS IN THE ASSORTMENT PILLAR

RANGE

Publix and **Walmart** stand out in delivering a broad and diverse product range. The breath of assortment remains a core driver of shopper satisfaction. Retailers must ensure they cater to broad and niche shopper needs to maintain competitive positioning.

BRANDS

Publix, Target and **Amazon** excel in offering the key brands that shoppers expect to find within categories. Retailers that ensure the availability of trusted and well-known brands see higher shopper satisfaction. Emphasizing partnerships with key manufacturers can further enhance performance.

INNOVATION

Costco (Online), **Target,** and **ShopRite** lead in delivering innovative and new products to shoppers. However, innovation continues to lag as the lowest-scoring lever. Retailers should focus on highlighting new product launches and creating an environment that fosters excitement for innovation.

CATEGORY HIGHLIGHT – BEAUTY CATEGORIES LEAD THE WAY

An analysis of assortment satisfaction by category shows that premium, staple, and high-frequency categories continue to dominate rankings.

Cosmetics-Lips and **Cosmetics-Facial Makeup** were the top-performing categories, showcasing improvements in innovation and range. Retailers that delivered on variety and premium options excelled.

TOP CATEGORIES IN ASSORTMENT SATISFACTION

RANK	CATEGORIES	RANK	CATEGORIES
1	Cosmetics - Lips	6	Frozen Vegetables
2	Cosmetics - Facial Makeup	7	Energy & Protein Bars
3	Yogurt	8	Surface Care
4	Checkout Magazines & Newspapers	9	Prepackaged Bread
5	Salty Snacks	10	Frozen Snacks

EXECUTION SATISFACTION

The Execution Pillar evaluates how well retailers deliver on operational excellence, including in-store navigation, out-of-stocks, shelf layout, enjoyment, and staff/online support. This section explores trends, retailer rankings, lever performance, and actionable recommendations to elevate shopper satisfaction.

EXECUTION IS IMPROVING BUT COULD BE BETTER

Execution satisfaction increased from 2023. It reflects significant advancements in operational efficiency, particularly in navigation and layout; the top performing levers within the Execution Pillar. However, opportunities for further growth remain, especially in addressing out-of-stock issues and improving the enjoyment of the shopping experience.

ShopRite and **Costco** topped the table, showing notable gains in execution satisfaction This was driven by their efforts to streamline shelf layouts and address inventory challenges.

Target follows closely with its focus on creating a pleasant and seamless shopping experience. Improved navigation and an enjoyable shopping atmosphere contribute to its strong performance.

Amazon continues to dominate execution satisfaction in the online space. Shoppers highlight the simplicity of navigation and the consistency of product availability as key differentiators. **Walmart Online** also impressed, particularly in online layout and availability.

Top Retailers for Execution Satisfaction:

Grocery Brick & Mortar

Rank	Retailer
1	**ShopRite**
2	**Publix**
3	**H-E-B**

Non-Grocery Brick & Mortar

Rank	Retailer
1	**Costco**
2	**Target**
3	**Sam's Club**

Online

Rank	Retailer
1	**Amazon**
2	**Walmart**
3	**Target**

EXECUTION SATISFACTION

TOP EXECUTION LEVERS IN DETAIL

NAVIGATION

Publix and **Target** are the top performing retailers in finding the category in store. Navigation remains a key driver of satisfaction. Retailers outperformed competitors by prioritizing intuitive layouts and streamlining digital platforms.

LAYOUT

Costco and **Publix** lead in Brick & Mortar and **Walmart** leads online in shelf layout, offering shoppers a simplified and enjoyable experience. Effective shelf layouts enhance the overall shopping journey.

OUT-OF-STOCKS

Publix, Costco and **Amazon** demonstrate effective inventory management, minimizing out-of-stock situations. Retailers that focus on supply chain optimization and predictive inventory planning see improved shopper loyalty.

CATEGORY HIGHLIGHT – HIGH FREQUENCY CATEGORIES DO WELL

The Execution Pillar extends beyond retailers to highlight the performance of product categories. The **Yogurt** and **Fresh Seafood** categories excelled in delivering exceptional execution satisfaction, showcasing strong navigation (finding the category in-store), shelf layout, and availability.

TOP CATEGORIES IN EXECUTION SATISFACTION

RANK	CATEGORIES	RANK	CATEGORIES
1	Yogurt	6	Snack Nuts
2	Fresh Seafood	7	Frozen Breakfast
3	Coffee	8	Frozen Seafood
4	Cookies	9	Beer, Cider, or Flavored Beer
5	Natural or Processed Cheese	10	In Aisle Chocolate Candy

SHOPPER SATISFACTION 2025: KEY IMPROVEMENTS & OPPORTUNITIES

Shopper Intelligence

PRICE

The Price Value Equation Must Be Right

Shoppers value transparency and consistency in pricing. While improvements were noted in value perceptions, there is still room to strengthen execution in **Price**, **Offers** and Everyday Low Prices (**EDLP**).

Focusing on communicating value better and refining promotional strategies would enhance product appeal. This is especially critical for **high frequency categories** such as eggs, and checkout candy, where price sensitivity remains high.

PRODUCT

Focus on Quality & Freshness

Quality and **Freshness** remain strengths, but shoppers are increasingly prioritizing attributes like **Premium**, **Healthy Choices** and **USA Made** products.

Addressing gaps in differentiating Premium products ("Premium products are noticeably better") and messaging. Natural/Organic and Environmental offer significant opportunities for growth, especially as these levers align closely with evolving shopper values.

ASSORTMENT

Shoppers are Looking for Innovation

While strong performance in **Brands** and **Range** (assortment breadth), shopper satisfaction continues to be driven by innovation.

Retailers should showcase fresh ideas and new products to capture shopper attention and reinvigorate categories. Shoppers seek variety and the excitement of discovering unique products, especially in categories like snacks, frozen foods and beverages.

EXECUTION

Prioritize Shopping Experience and Out of Stocks

Significant strides have been made in **Navigation** (finding the category) and **Shelf Layout**, with improved signage and store designs simplify the shopping experience. However, shopping experience (**Enjoy**), **Staff** availability and **out-of-stock** issues persist as critical areas for improvement.

Retailers should prioritize staff training and resource allocation to improve customer interactions and better manage inventory levels. These efforts will directly impact shopper perceptions of reliability and convenience.

THIS IS A LOT! HOW DO WE PRIORITIZE?

Our analysis identifies key priority areas – factors highly important to shoppers but with lagging satisfaction. It highlights crucial opportunities for retailers to enhance performance.

Price and Value Gaps – Prices rank as the 3rd most important factor, but shopper satisfaction with pricing lags at 8th place. Similarly, Best Value (ranked 9th in importance) also underperforms in satisfaction (13th place). This suggests that while shoppers prioritize affordability, many feel they are not getting the value they expect. Retailers must refine their pricing strategies and better communicate value to enhance shopper confidence.

Product Quality and Freshness
Quality is the 2nd most important lever, but satisfaction only ranks 5th, while Freshness follows a similar trend (4th in importance, 6th in satisfaction). Retailers excelling in product consistency and freshness will likely see significant boosts in shopper loyalty.

Execution Pain Points – Out-of-stocks (OOS), Navigation, and Layout are ranked among the top-seven most important factors, yet satisfaction is low (OOS: 10th, Navigation: 9th, Layout: 3rd). While retailers have improved store layouts, they must focus on optimizing stock availability and ensuring seamless product discovery.

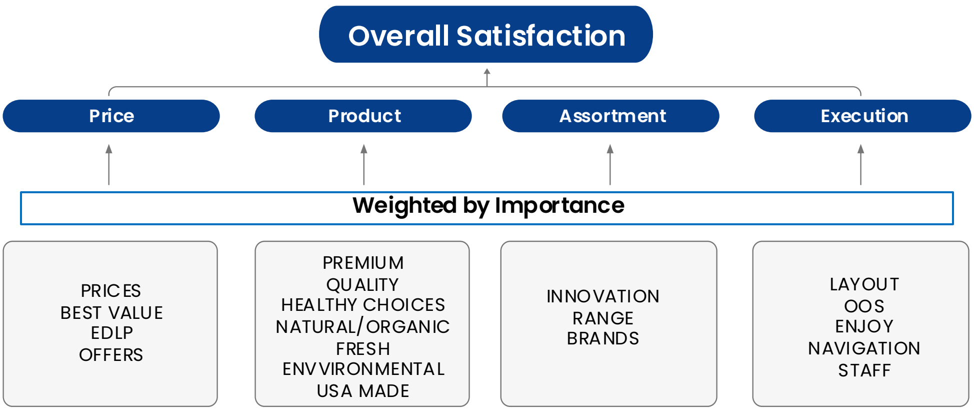
HIGHLY IMPORTANT LEVERS SHOULD RANK HIGH IN SATISFACTION, BUT THERE ARE GAPS:

Pillar (Lever Grouping)	Lever	Importance Rank	Satisfaction Rank
Assortment	**Brands**	1	2
Product	**Quality**	2	5
Price	**Prices**	3	8
Product	**Fresh**	4	6
Execution	**Layout**	5	3
Assortment	**Range**	6	4
Execution	**Navigation**	7	1
Execution	**OOS**	8	10
Price	**Best Value**	9	7
Price	**EDLP**	10	13
Price	**Offers**	11	12
Product	**Premium**	12	14
Product	**USA Made**	13	9
Product	**Healthy Choices**	14	11
Product	**Natural / Organic**	15	15
Execution	**Enjoy**	16	16
Product	**Environmental**	17	19
Assortment	**Innovation**	18	18
Execution	**Staff**	19	17

SATISFACTION REPORT METHODOLOGY

HOW WE DEFINE OVERALL SHOPPER SATISFACTION

During our survey, we ask shoppers about the importance of 19 different category within the retail experience. These include metrics like Range/Choice, Innovation, Pricing, Natural/Organic, Limiting out of stocks in the category, etc. After understanding how important each of these are to the shopper in the category, we ask follow-up questions to discover how the retailer is performing in each of the 19 levers. The levers are then weighed for importance to create our four key satisfaction pillars - Price, Product, Assortment and Execution, as well as an Overall Satisfaction Score for the category and retailer. This diagram shows the methodology:



Pillar (Lever Grouping)	Lever	Definition
Price	**Prices**	Great prices in CATEGORY
Price	**Best Value**	Easy to identify what's the best value for the money in CATEGORY
Price	**EDLP**	I can consistently rely on a fixed low price for CATEGORY
Price	**Offers**	Good special offers in CATEGORY
Product	**Premium**	Premium products in CATEGORY are noticeably better
Product	**Quality**	Great quality in CATEGORY
Product	**Healthy Choices**	Good range of healthy options in CATEGORY
Product	**Natural/Organic**	Good choices of natural or organic products in CATEGORY
Product	**Fresh**	Excellent freshness of CATEGORY
Product	**Environmental**	CATEGORY does minimal environmental harm and is ethically produced
Product	**USA Made**	I am able to buy USA made or sourced CATEGORY
Assortment	**Innovation**	Appealing new ideas/products in CATEGORY
Assortment	**Range**	Sufficient choice of CATEGORY
Assortment	**Brands**	The brands I know and like in CATEGORY were available
Execution	**Layout**	Once I found CATEGORY, it was easy to find my choice
Execution	**OOS**	Did not have to switch my choice because what I wanted was out of stock
Execution	**Enjoy**	It is quite enjoyable and/or interesting to shop for CATEGORY in RETAILER
Execution	**Navigation**	It's easy to find CATEGORY in the store/on the website
Execution	**Staff**	Has knowledgeable and helpful staff/online support in CATEGORY

RETAILERS INCLUDED IN OUR RANKING

Shopper Intelligence

At Shopper Intelligence, our fieldwork takes us across many channels. Most of our fieldwork is concentrated on key retailers within Mass, Grocery, Club, Drug, Dollar and Online. In many of those retailers, we are tracking over 100 categories on a quarterly basis. It gives us a powerful benchmark to see how category shoppers are different across the store. Our 2025 Shopper Satisfaction Report does not include more specialty channels in our rankings. These include key retailers within Convenience, Liquor, Beauty, Pet, Home Improvement, etc.

- **To be included in the rankings, retailers must meet two criteria:**

  At least 1,000 shopper interviews conducted in 2024 with coverage of 40 or more categories. Channels not included in the ranking: Liquor, Beauty, Convenience, Hardware, Pet Specialty and Specialty (e.g., GNC, Bath & Body Works, etc.)

Grocery
Brick & Mortar

- meijer
- Ahold Delhaize
- H-E-B
- Kroger
- Publix
- ShopRite
- Albertsons
- SAFEWAY

Non-Grocery
Brick & Mortar

- Costco Wholesale
- Walgreens
- Walmart
- Family Dollar
- Dollar General
- Target
- CVS pharmacy
- sam's club

Online

- CVS
- Target
- Costco Wholesale
- amazon
- Walgreens
- Kroger
- Walmart
- sam's club

WHO ARE WE

At Shopper Intelligence, we are focused on understanding shoppers and leveraging those learnings to drive category growth for our clients. Since 2020, we have surveyed **~650,000** US shoppers across **~50** different retailers & **~120** different categories. In 2024, we surveyed over **160,000** shoppers; **50,000** online shoppers and **110,000** brick and mortar shoppers. Our ongoing quarterly fieldwork allows us to track retailers and categories across **150** different metrics on the shopper.

Overall, our research/insights are primarily used in **two ways by our clients:**

1

Build Strategy and Prioritize

Helps our clients build better retailer and category strategies. By understanding shoppers, you can prioritize the areas to focus on to drive growth. This helps fuel channel and retailer 4P strategy.

COMMON USE CASES: Channel & Retailer strategies. Shopper Journey or Path to Purchase Studies.

2

Create Alignment

Builds better alignment between retailers & brands. Shopper Intelligence is an objective database that offers a unique perspective into how categories perform across the store/online and competition.

COMMON USE CASES: Top to Top, JBP, Category/ Line Reviews.

WHAT ARE THE INSIGHTS WE KNOW ON YOUR CATEGORY?

Category DNA
Helps to define category strategy

Path to Purchase
Triggers to leverage on the Shopper Journey

Satisfaction
Understand shopper priorities & retailer performance

Shopper Profile
Analyze a wide range of shopper dynamics

WANT TO LEARN MORE?

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RETAILER RANKINGS

RANKINGS: SATISFACTION BY PILLAR

Shopper Intelligence

Grocery Brick & Mortar

Rank	Overall	Price	Product	Assortment	Execution
1	ShopRite	ShopRite	Publix	Publix	ShopRite
2	H-E-B	H-E-B	ShopRite	ShopRite	Publix
3	Publix	meijer	H-E-B	meijer	H-E-B
4	meijer	Kroger	meijer	H-E-B	meijer
5	Kroger	Ahold Delhaize	Ahold Delhaize	Kroger	Kroger
6	Ahold Delhaize	Albertsons Safeway	Kroger	Ahold Delhaize	Ahold Delhaize
7	Albertsons Safeway	Publix	Albertsons Safeway	Albertsons Safeway	Albertsons Safeway

Non-Grocery Brick & Mortar

Rank	Overall	Price	Product	Assortment	Execution
1	Costco Wholesale	Costco Wholesale	Costco Wholesale	Target	Costco Wholesale
2	sam's club	sam's club	Target	Walmart	Target
3	Target	Dollar General	sam's club	Costco Wholesale	sam's club
4	Walmart	Target	Walmart	sam's club	Walmart
5	Dollar General	Walmart	Walgreens	Dollar General	CVS
6	Walgreens	Family Dollar	CVS	Walgreens	Dollar General
7	CVS	Walgreens	Dollar General	CVS	Walgreens
8	Family Dollar	CVS	Family Dollar	Family Dollar	Family Dollar

Online Retailers

Rank	Overall	Price	Product	Assortment	Execution
1	amazon	Costco Wholesale	amazon	amazon	amazon
2	Target	Target	Target	Walmart	Walmart
3	Costco Wholesale	amazon	Costco Wholesale	Target	Target
4	Walmart	Walmart	Kroger	Kroger	Kroger
5	Kroger	Kroger	Walmart	Costco Wholesale	Costco Wholesale
6	sam's club	sam's club	sam's club	sam's club	sam's club
7	CVS	CVS	CVS	CVS	CVS
8	Walgreens	Walgreens	Walgreens	Walgreens	Walgreens

RANKINGS: PRICE PILLAR SATISFACTION BY LEVER

Shopper Intelligence

GROCERY BRICK & MORTAR	PRICE	PRICES	OFFERS	BEST VALUE	EDLP
ShopRite	**1**	2	1	1	2
H-E-B	**2**	1	7	5	1
meijer	**3**	3	4	6	4
Kroger	**4**	4	3	2	5
Ahold Delhaize	**5**	5	5	3	3
Albertsons SAFEWAY	**6**	6	2	7	6
Publix	**7**	7	6	4	7

NON- GROCERY BRICK & MORTAR	PRICE	PRICES	OFFERS	BEST VALUE	EDLP
Costco Wholesale	**1**	1	4	1	2
sam's club	**2**	2	7	2	3
DOLLAR GENERAL	**3**	3	5	4	1
TARGET	**4**	5	3	3	6
Walmart	**5**	4	8	5	4
FAMILY DOLLAR	**6**	6	6	8	5
Walgreens	**7**	7	1	6	7
CVS	**8**	8	2	7	8

ONLINE	PRICE	PRICES	OFFERS	BEST VALUE	EDLP
Costco Wholesale	1	1	1	3	1
TARGET	2	4	2	1	3
amazon	3	3	4	2	5
Walmart	4	2	8	4	2
Kroger	5	6	3	5	7
sam's club	6	5	6	6	4
CVS	7	7	5	7	6
Walgreens	8	8	7	8	8

RANKINGS: PRODUCT PILLAR SATISFACTION BY LEVER

GROCERY BRICK & MORTAR	PRODUCT	PREMIUM	HEALTHY CHOICES	ENVIRON-MENTAL	USA MADE	QUALITY	NATURAL ORGANIC	FRESH
Publix	1	1	2	4	3	1	1	1
ShopRite	2	2	3	1	2	4	2	2
H-E-B	3	3	1	2	1	2	3	3
meijer	4	5	5	7	6	3	6	4
Ahold Delhaize	5	4	4	3	4	6	4	6
Kroger	6	7	6	6	7	5	7	5
Albertsons SAFEWAY	7	6	7	5	5	7	5	7

NON- GROCERY BRICK & MORTAR	PRODUCT	PREMIUM	HEALTHY CHOICES	ENVIRON-MENTAL	USA MADE	QUALITY	NATURAL ORGANIC	FRESH
COSTCO WHOLESALE	1	1	2	4	1	1	2	1
TARGET	2	3	1	1	2	3	1	3
sam's club	3	2	4	3	3	2	3	2
Walmart	4	5	3	7	4	4	4	4
Walgreens	5	7	7	8	5	5	8	5
CVS	6	4	6	2	6	7	5	7
DOLLAR GENERAL	7	6	5	5	7	6	7	6
FAMILY DOLLAR	8	8	8	6	8	8	6	8

ONLINE	PRODUCT	PREMIUM	HEALTHY CHOICES	ENVIRON-MENTAL	USA MADE	QUALITY	NATURAL ORGANIC	FRESH
amazon	1	3	1	5	3	1	3	1
TARGET	2	1	2	3	1	2	2	4
COSTCO WHOLESALE	3	2	3	2	2	4	1	2
Kroger	4	6	5	7	4	3	7	3
Walmart	5	8	7	8	6	5	8	5
sam's club	6	5	6	4	5	6	5	6
CVS	7	4	4	1	7	7	4	7
Walgreens	8	7	8	6	8	8	6	8

RANKINGS: ASSORTMENT PILLAR SATISFACTION BY LEVER

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GROCERY BRICK & MORTAR	ASSORTMENT	INNOVATION	RANGE	BRANDS
Publix	**1**	3	1	1
ShopRite	**2**	2	2	2
meijer	**3**	4	3	3
H-E-B	**4**	1	6	6
Kroger	**5**	7	4	4
Ahold Delhaize	**6**	5	7	5
Albertsons SAFEWAY	**7**	6	5	7

NON- GROCERY BRICK & MORTAR	ASSORTMENT	INNOVATION	RANGE	BRANDS
TARGET	**1**	1	2	1
Walmart	**2**	7	1	2
COSTCO WHOLESALE	**3**	3	3	3
sam's club	**4**	5	4	4
DOLLAR GENERAL	**5**	2	5	6
Walgreens	**6**	8	6	5
CVS	**7**	6	7	7
FAMILY DOLLAR	**8**	4	8	8

ONLINE	ASSORTMENT	INNOVATION	RANGE	BRANDS
amazon	**1**	4	2	2
Walmart	**2**	8	3	1
TARGET	**3**	3	4	4
Kroger	**4**	7	1	3
COSTCO WHOLESALE	**5**	1	5	5
sam's club	**6**	5	6	6
CVS	**7**	2	7	7
Walgreens	**8**	6	8	8

Shopper Intelligence

RANKINGS: EXECUTION PILLAR SATISFACTION BY LEVER

GROCERY BRICK & MORTAR	EXECUTION	LAYOUT	OOS	ENJOY	NAVIGA-TION	STAFF
ShopRite	1	2	3	2	2	3
Publix	2	1	1	3	1	2
H-E-B	3	7	7	1	7	1
meijer	4	3	2	5	4	7
Kroger	5	4	4	6	3	6
Ahold Delhaize	6	5	5	4	5	4
Albertsons SAFEWAY	7	6	6	7	6	5

NON- GROCERY BRICK & MORTAR	EXECUTION	LAYOUT	OOS	ENJOY	NAVIGA-TION	STAFF
COSTCO WHOLESALE	1	1	1	2	3	6
TARGET	2	5	2	1	1	5
sam's club	3	3	4	4	4	7
Walmart	4	2	3	7	2	8
CVS	5	4	5	3	6	4
DOLLAR GENERAL	6	7	7	6	7	3
Walgreens	7	6	6	8	5	1
FAMILY DOLLAR	8	8	8	5	8	2

ONLINE	EXECUTION	LAYOUT	OOS	ENJOY	NAVIGA-TION	STAFF
amazon	1	3	1	3	1	6
Walmart	2	1	3	8	2	7
TARGET	3	4	2	2	4	1
Kroger	4	2	4	7	3	8
COSTCO WHOLESALE	5	5	5	1	5	2
sam's club	6	6	7	5	6	4
CVS	7	7	6	4	7	3
Walgreens	8	8	8	6	8	5

SAMPLE SIZES COLLECTED IN 2024

Grocery Brick & Mortar	Sample Size
Ahold Delhaize	7,398
Albertsons SAFEWAY	8,255
H-E-B	3,598
Kroger	7,303
meijer	7,398
Publix	4,349
ShopRite	3,769

Non-Grocery Brick & Mortar	Sample Size
COSTCO WHOLESALE	6,573
CVS	4,326
DOLLAR GENERAL	8,160
FAMILY DOLLAR	4,257
sam's club	5,559
TARGET	6,601
Walgreens	4,222
Walmart	18,889

Online	Sample Size
amazon	7,915
COSTCO WHOLESALE	3,911
CVS	2,219
Kroger	3,830
sam's club	4,586
TARGET	6,289
Walgreens	1,916
Walmart	9,676

WHO ARE WE

At Shopper Intelligence, we are focused on understanding shoppers and leveraging those learnings to drive category growth for our clients. Since 2020, we have surveyed **~650,000** US shoppers across **~50** different retailers & **~120** different categories. In 2024, we surveyed over **160,000** shoppers with **50,000** online shoppers and **110,000** brick and mortar shoppers. Our ongoing quarterly fieldwork allows us to track retailers & categories across **150** different metrics on the shopper.

Overall, our research/insights are primarily used in **two ways by our clients:**

1 **Build Strategy and Prioritize**

Helps our clients build better retailer and category strategies. By understanding a retailer's shoppers, you can prioritize which areas to focus on to drive growth. Helps fuel channel and retailer 4P strategy.

COMMON USE CASES: Channel & Retailer strategies. Shopper Journey or Path to Purchase Studies.

2 **Create Alignment**

Builds better alignment between retailers & brands. Shopper Intelligence is an objective database that gives a unique perspective into how categories perform across the store/online and competition.

COMMON USE CASES: Top to Top, JBP, Category/ Line Reviews.

WHAT ARE THE INSIGHTS THAT WE KNOW ON YOUR CATEGORY?

Category DNA
Helps to define category strategy

Path to Purchase
Triggers to leverage on the Shopper Journey

Satisfaction
Understand shopper priorities & retailer performance

Shopper Profile
Analyze a wide range of shopper dynamics

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