SEPTEMBER 2025

AISLES TO EXPERIENCES: RETHINKING GROCERY DESIGN FOR THE NEXT ERA OF CONVENIENCE & CONNECTION

MG2

AN AFFILIATE OF
COLLIERS ENGINEERING & DESIGN

Grocery shopping habits are evolving.

Shoppers are making more quick, purposeful trips, blending digital and in-store touchpoints, and adjusting what they buy based on shifting needs around budget, time, and lifestyle. At the same time, grocers are under pressure to manage rising labor costs and operational demands, often turning to automation and technology to keep pace. But efficiency alone isn't enough. Today's shoppers define value not just by price or speed, but by how easy a store is to navigate, how connected it feels to their lives, and whether it offers moments of discovery along the way. They want a space that's fast when it needs to be, but also personal, local, and worth coming back to. In this report, we explore how grocery retailers can evolve their physical environments to better support ease, exploration, and meaningful engagement, all while delivering real value rooted in everyday behavior.

Per our study, our respondents shared key insights about their experience with and perceptions of the grocery shopping environment, including the full shopper journey from the point of arrival through in-store design and amenities, and identified which enhancements and offerings would deliver the most value and drive greater satisfaction:

In-Store Still Dominates *(Confirmed)*

3 IN 5 respondents still do **most of their grocery shopping in-store**, while only 1 in 6 primarily use online ordering platforms.

Interior Elements that Elevate

51% of respondents say that **finished or polished flooring** is a key indicator of a premium, thoughtfully designed grocery store. Nearly as many (48%) place high value on **signage that is custom designed** for the store rather than generic.

Experiential Amenities

1 IN 2 respondents are **drawn to market style food halls** with multiple cuisines, similar to Eataly. These spaces encourage shoppers to linger longer and explore more of the store.

The Appeal of Local

NEARLY 60% of respondents feel a stronger connection to their community when a grocery **store showcases and supports local** products and partnerships.

Leading Journey Pain Points

50/50 even split on the top 2 sources of frustration for respondents: **parking lot design** and the **checkout queuing process**.

Beyond the Cart: Creating Grocery Experiences That Matter

Grocery stores have long been central to everyday life, part errand and part ritual. From small neighborhood markets to sprawling supermarkets, shopping patterns have always mirrored the communities they serve. Today, despite the rise of online ordering, most shoppers still do the majority of their grocery shopping in-store. But as life speeds up and priorities shift, so do expectations for what a store should deliver. Shoppers juggle efficiency, affordability, wellness, and inspiration often all at once. They want stores that are easy to navigate, with clear signage and thoughtful design details like polished floors that signal quality. At the same time, they're drawn to spaces that feel connected to their community, with local products and partnerships making the shopping experience more meaningful. Retailers face the challenge of balancing these needs alongside operational pressures and friction points like parking and checkout frustration. This presents an opportunity to rethink the grocery store not just as a place to buy food, but as a space that builds trust, sparks discovery, and creates a sense of belonging. By focusing on ease, clarity, and connection, grocers can turn routine trips into experiences that keep shoppers coming back, not just out of habit, but because the store feels relevant, inviting, and worth their time.

RESEARCH & INSIGHTS

Market research

Behavioral research

Design research

CONCEPTUAL MAPPING

Create consumer personas

Illuminate affinities

Align with business metrics

DESIGN OPPORTUNITIES

User journeys

Key touchpoints

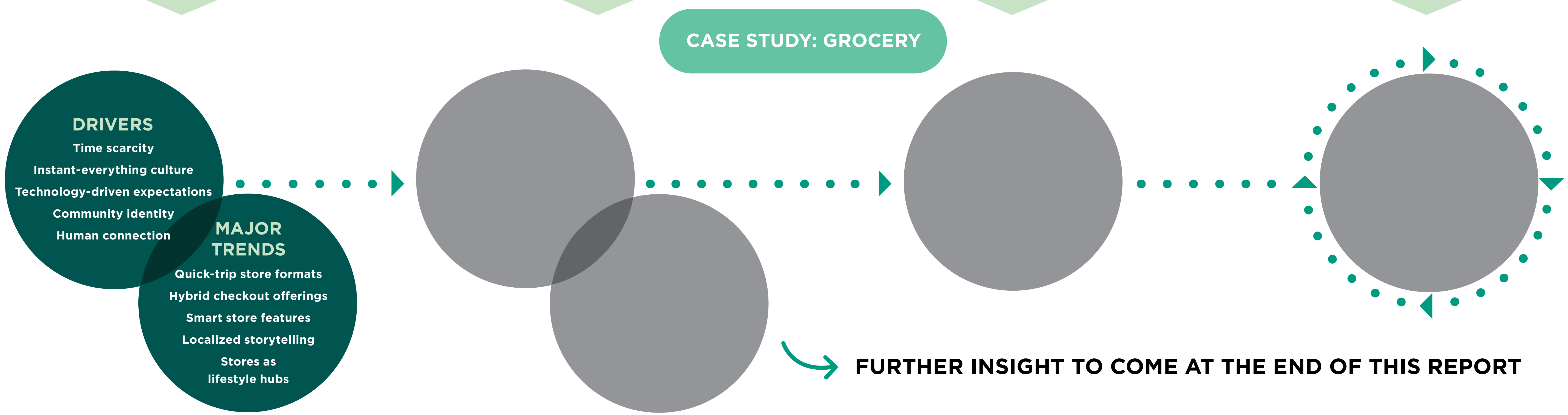
Story board options

IMPLEMENT, TEST, LEARN

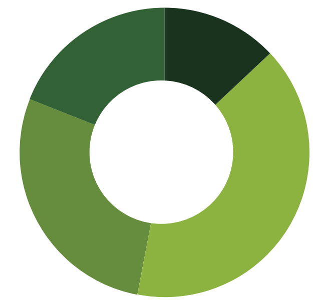
Implement concepts

A/B test

Measure success



Overall Key Demographic & Behavioral Insights

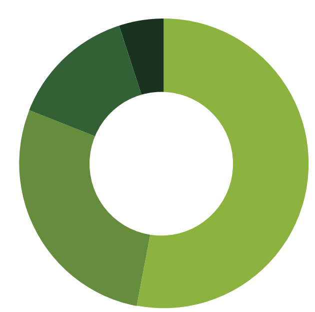


Respondent ages applicable to this survey include:

- **13%,** Gen Z (18-28)
- **40%,** Millennials (29-44)
- **28%,** Gen X (45-60)
- **19%,** Boomers (61+)

Respondent gender participation applicable to this survey include:

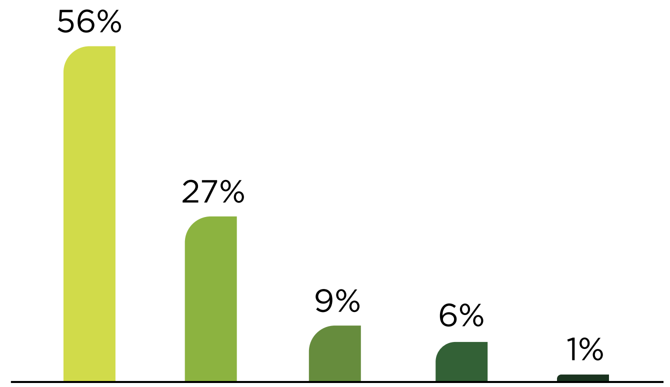
- **52%,** Female
- **48%,** Male



Respondent household income applicable to this survey include:

- **53%,** $50K-$100K
- **28%,** $100K-$150K
- **14%**, $150K-$200K
- **5%,** $200K+

Which of the following best describes how you usually shop for groceries? *Select One*



- Primarily in-store
- A mix of in-store and online pickup

Millennials lean hybrid. Shoppers under the age of 45 are 2X as likely as Boomers to mix in-store and online pickup

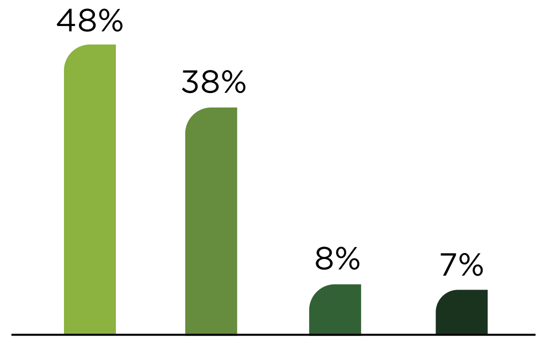
- Primarily online with pickup (e.g., curbside or in-store pickup)
- I primarily order online with home delivery, I rarely shop in-store
- I don't shop for groceries (i.e., parents shop, spouse shops, etc.)

Which of the following best describes your grocery shopping frequency? *Select One*

- **53%,** One big weekly haul: I do one large shopping trip each week to get everything I need (10+ items)
- **39%,** A few mid-size trips each week: I make multiple trips to restock essentials and pick up what I need (5-10 items per trip)
- **8%,** Frequent quick stops: I mostly drop in for 1-2 items or grab-and-go food and quick necessities throughout the week

Meal Grabbers are the most likely persona to make frequent stops, whereas Conscious Consumers and Quick Trippers prefer one big weekly haul

Which type of grocery shopper do you most identify with? *Select One*

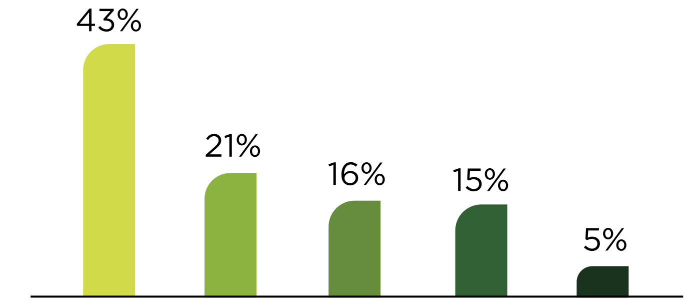


- I focus on speed and efficiency. I want to get in and out with as little friction as possible
- I enjoy the in-store experience and like when the space feels considered, calm, and well-designed

Design matters. Nearly half of respondents prioritize efficiency, but more than one-third value the in-store experience. This demonstrates the important role design plays in driving satisfaction.

- I choose stores that align with my values, like supporting local makers or reducing environmental impact
- I'm motivated by the food itself, fresh meals, and in-store tasting

When a grocery store has prepared food areas, how does it affect the rest of your trip? *Select One*



- I come to grocery shop, but will grab prepared food if I'm short on time
- I come mainly for the prepared food, and often end up shopping more while I'm there

Gen Z is 4X more likely than other age groups to come for the food and shop while there

- I don't usually buy it, but the smells, activity, or displays improve the store atmosphere
- It doesn't change how I shop or what I buy

Boomers are the least motivated by food offerings among all age groups

- I usually skip the prepared food areas because they can feel a bit crowded or hard to navigate

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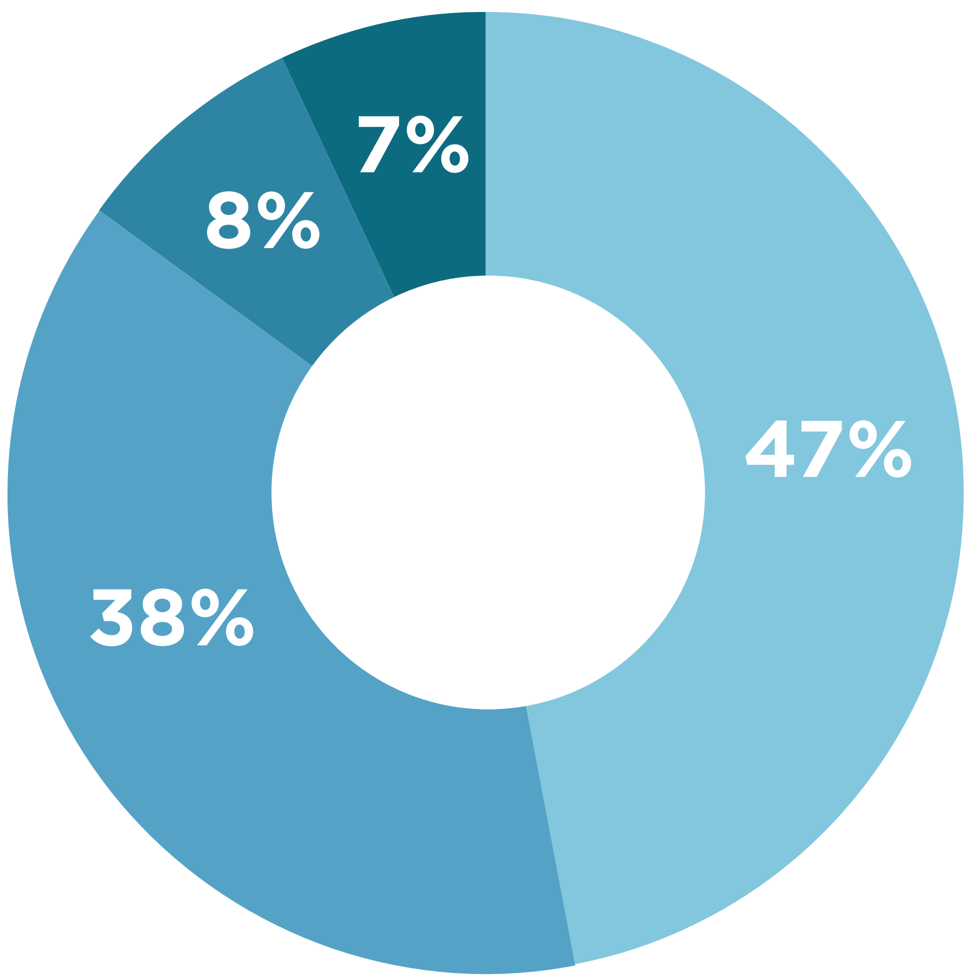
SECTION 1: TODAY’S GROCERY SHOPPER

Consumer Personas Defined

Consumer Personas



47%, The Quick Tripper

Defined as individuals who prioritize efficiency over exploration; they seek intuitive layouts and frictionless service that respects their time and purpose.

38%, The Vibe Voyager

Defined as individuals who value atmosphere as much as assortment; they are drawn to curated offerings, impactful design, and amenities that elevate the overall experience.

8%, The Conscious Consumer

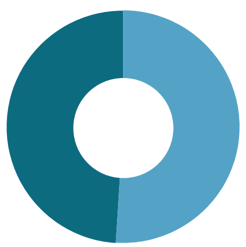
Defined as individuals who look beyond the transaction; they are drawn to brands that express clear values and cultural awareness.

7%, The Meal Grabber

Defined as individuals who see pre-prepared food as the focal point, they seek out grocery destinations that make meal solutions inspiring and seamless to them.

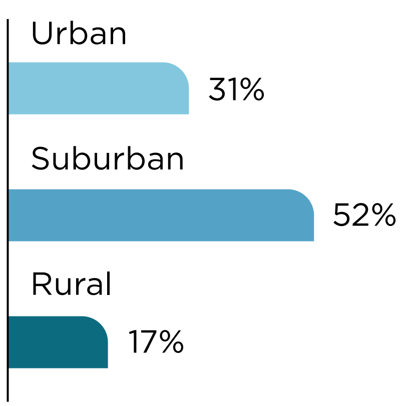
The Quick Tripper

Persona Representation:



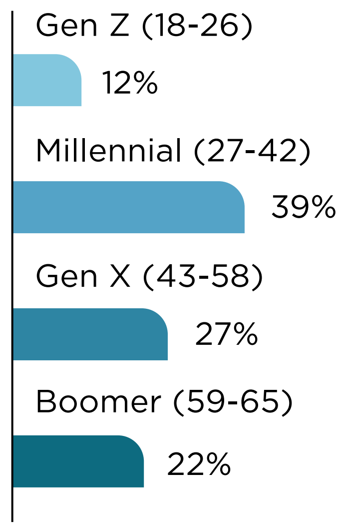
- **51%,** Female
- **49%,** Male

Persona Geography:



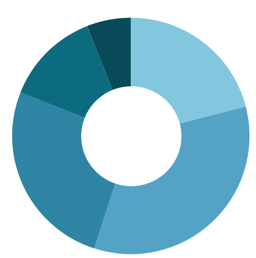
Persona Age Range:

Lowest representation of Gen Z of any persona



Persona Household Income:

Highest concentration of consumers over $200K of any persona



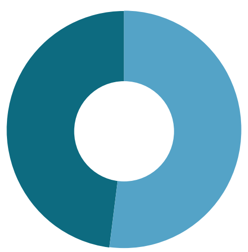
- **21%,** $0-49K
- **34%,** $50-100K
- **26%,** $100-150K
- **13%,** $150K-199K
- **6%,** $200K+

Additionally, they...

- See grocery shopping as something to be done efficiently, not enjoyed, and values speed, simplicity, and a frictionless journey above all
- Get frustrated by elements that slow them down, including crowded aisles, unclear signage and navigation, poor parking lot design and flow, and long checkout lines
- Prefer grocery store environments that provide a fast in-and-out trip with intuitive layouts, self-checkout options, and minimal distractions

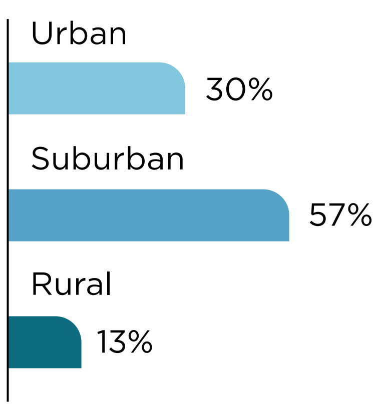
The Vibe Voyager

Persona Representation:

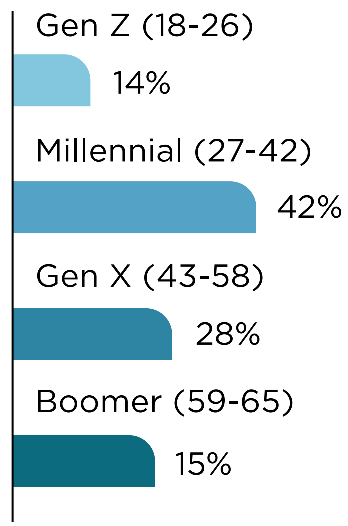


- **52%,** Female
- **48%,** Male

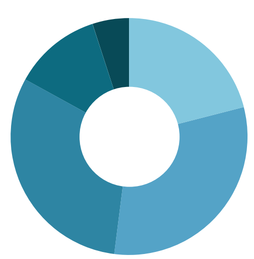
Persona Geography:



Persona Age Range:
Highest representation of Millennials of any persona



Persona Household Income:
Highest concentration of consumers within $100-150K of any persona



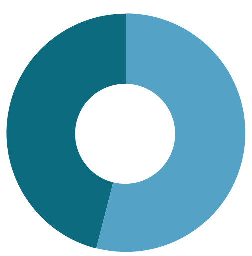
- **21%,** $0-49K
- **31%,** $50-100K
- **31%,** $100-150K
- **12%,** $150K-199K
- **5%,** $200K+

Additionally, they...

- Shop for the experience, valuing stores that feel calm and intentionally designed, with attention to layout, lighting, and sensory details along the journey
- Are most receptive to in-store amenities and highly drawn to food halls, cafés, lounge areas, and pop-ups that make the store feel more engaging
- Prefer brands and spaces that feel elevated and is more likely to return to a grocery environment that is visually appealing and well put together

The Conscious Consumer

Persona Representation:



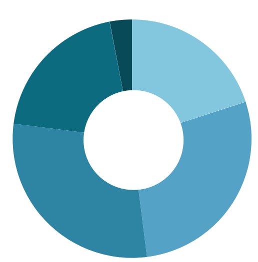
Persona Geography:
Highest representation of Urban based consumers of any persona

Urban
38%
Suburban
43%
Rural
20%

Persona Age Range:

Gen Z (18-26)
13%
Millennial (27-42)
40%
Gen X (43-58)
28%
Boomer (59-65)
20%

Persona Household Income:

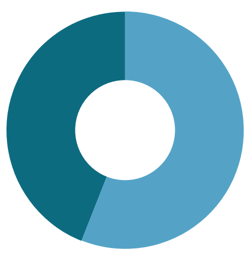


Additionally, they...

- Shop at grocery stores that align with their values, such as retailers that focus on local sourcing, sustainability, and community partnerships
- Prefer a staff-supported checkout experience, showing a desire for human interaction and a less rushed trip
- Are most responsive to design choices that reflect store values, such as signage featuring local vendors, refill stations, and outdoor spaces

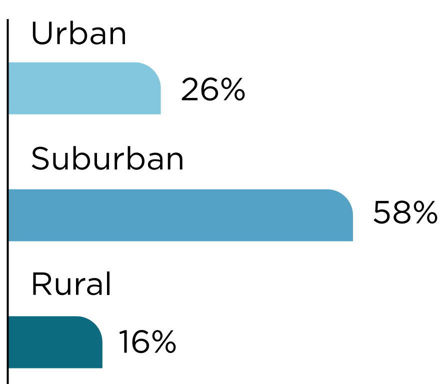
The Meal Grabber

Persona Representation:
Highest representation of female consumers of any persona

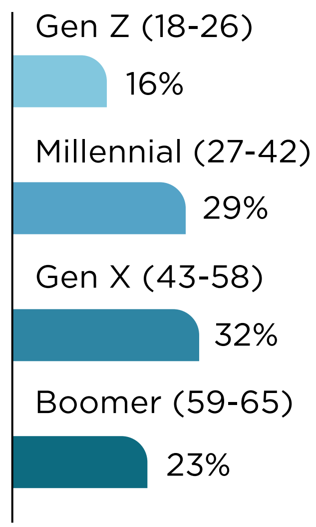


- **56%,** Female
- **44%,** Male

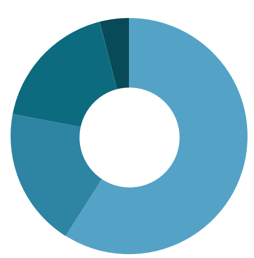
Persona Geography:
Highest representation of Suburban based consumers of any persona



Persona Age Range:
Highest representation of Gen Z, Gen X and Boomers of any persona



Persona Household Income:
Highest concentration of consumers within $50-100K of any persona



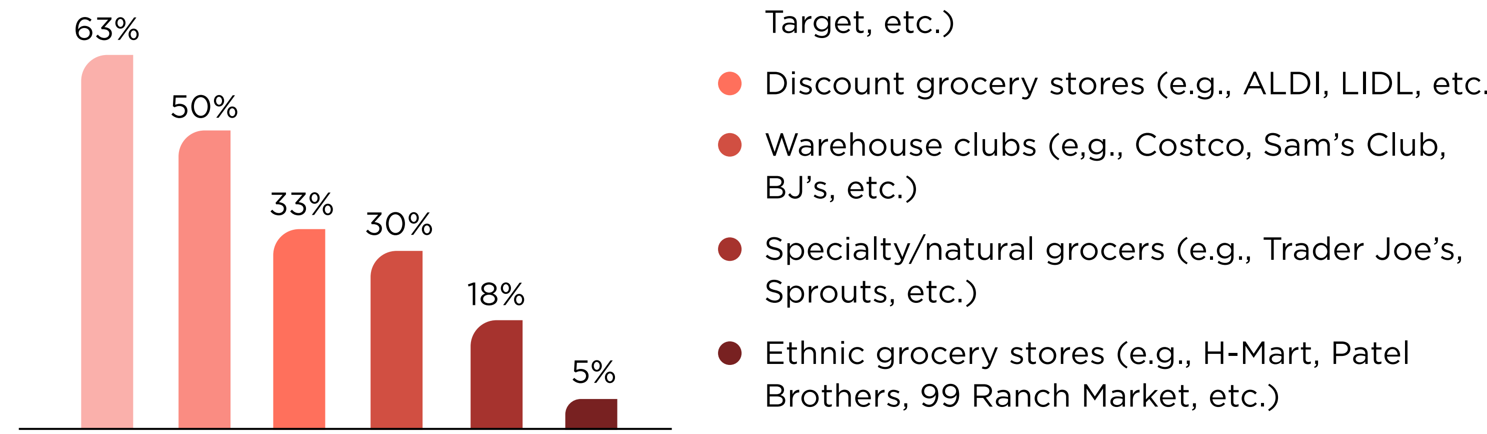
- **59%,** $50-100K
- **19%,** $100-150K
- **18%,** $150K-199K
- **4%,** $200K+

Additionally, they...

- Come for the food samples, hot bars, and fresh meals, with grocery shopping as a secondary focus
- Respond to sensory cues and memorable food zones
- Prefer grab-and-go options with ease, caring less about community features and more about spaces that allow them to pause and enjoy their food

SECTION 2: STORE FORMATS SHAPING SHOPPER PREFERENCES

Which grocery store format do you shop at most often?
Select Top Two



Traditional grocery stores remain the top choice for most shoppers, with clear differences by income and location.

Where people shop for groceries reveals how access, income, and geography shape consumer behavior. Traditional grocers remain the top choice, with 63% of shoppers naming them among their two most frequent stops. Superstores like Walmart and Target follow at 50%, while more than a third turn to discount chains such as ALDI and LIDL. These patterns often reflect necessity more than preference. Lower-income households are 2X as likely to rely on superstores, while high-income shoppers are nearly 3X more likely to choose specialty stores. Rural shoppers face fewer options, with 75% depending on large-format superstores, compared to about 45% in urban or suburban areas. In response, retailers are adjusting their approach. ALDI, for example, will open a scaled-down store in The Ellery, a luxury residential building in Midtown Manhattan, in 2026. Designed for quick, convenient trips in a dense, high-traffic area, the format reflects a shift toward meeting shoppers where they are. Understanding how income, location, and lifestyle influence behavior helps grocers make smarter decisions about where and how to serve.

What motivates you to choose one grocery store over another (aside from price and distance)? *Select Top Two*

While assortment and ease still matter most to grocery shoppers, design and prepared food offerings are becoming increasingly important with younger demographics like Gen Z and Millennials.

Knowing what draws a shopper to one grocery store over another reveals how expectations are evolving beyond just price and location. **Today's consumers are making choices based on experience and alignment with their lifestyles.** Over half of respondents say they choose a store for its wider product assortment or because it's easier to navigate and get in and out quickly. For Quick Trippers, layout is key, coming in 20% greater in importance than any other persona. Design also plays a growing role. Nearly 40% value a store that feels clean, modern, and thoughtfully designed. Vibe Voyagers lead here, drawn to aesthetics and in-store ambiance. Urban shoppers are especially attuned to this (44% vs. 25% rural). Those who prioritize design frequent stores like Trader Joe's and Whole Foods. Prepared foods are another driver, especially for Gen Z and Millennials who prioritize them 2X more than Boomers. For Conscious Consumers, values drive decisions from sourcing to sustainability. These shifts reflect deeper lifestyle preferences and point to an opportunity for grocers to combine function with feel. When assortment, ease, and environment align, the store becomes more than a stop, it becomes a draw.

Shopper preferences reveal that brand loyalty is shaped by design, convenience, and alignment with lifestyle values. Each retailer resonates differently depending on who's shopping and what they value.

Walmart leads on ease and speed, ranking highest for navigation (52%) and checkout (37%).

Target and Trader Joe's **stand out more for vibe and design** (34%). Millennials and Gen Zers **value vibe and food**, with 42% praising Trader Joe's and Target for **personality and design**, and nearly one-third recognizing Whole Foods for its **prepared food offerings**. High-income earners mirror this sentiment, with 55% of shoppers making $150K+ highlighting Trader Joe's for its **design and personalit**y.

LIDL, BJ's, and Publix **have the highest rates of low or no recognition, suggesting weaker brand presence** in many geographical areas.

Persona preferences: Meal Grabbers favor Trader Joe's and Whole Foods for **prepared food quality**.

Quick Trippers **connect more with Walmart and ALDI for speed**, while Conscious Consumers lean toward Whole Foods and Target for **sustainability and local sourcing**.

To stay relevant across diverse shopper groups, retailers should double down on their strengths, whether it's speed, design, or values, while identifying white space to build brand recognition, elevate the store experience, and better serve evolving shopper mindsets.

**Costco omitted as they are a current client*

Brand benchmarks: Thinking about the in-store experience of these brands, which of the following do you feel each brand does well?
*Showing top three brands in each category**

Strong store personality

#1 TRADER JOE'S
#2 TARGET
#3 WHOLE FOODS MARKET

Easy to navigate

#1 Walmart
#2 TARGET
#3 ALDI

Great prepared food area

#1 WHOLE FOODS MARKET
#2 TRADER JOE'S
#3 Walmart

Clear signs of sustainability

#1 TRADER JOE'S
#2 WHOLE FOODS MARKET
#3 TARGET

Visually appealing store design

#1 TARGET
#2 TRADER JOE'S
#3 WHOLE FOODS MARKET

Smooth checkout process

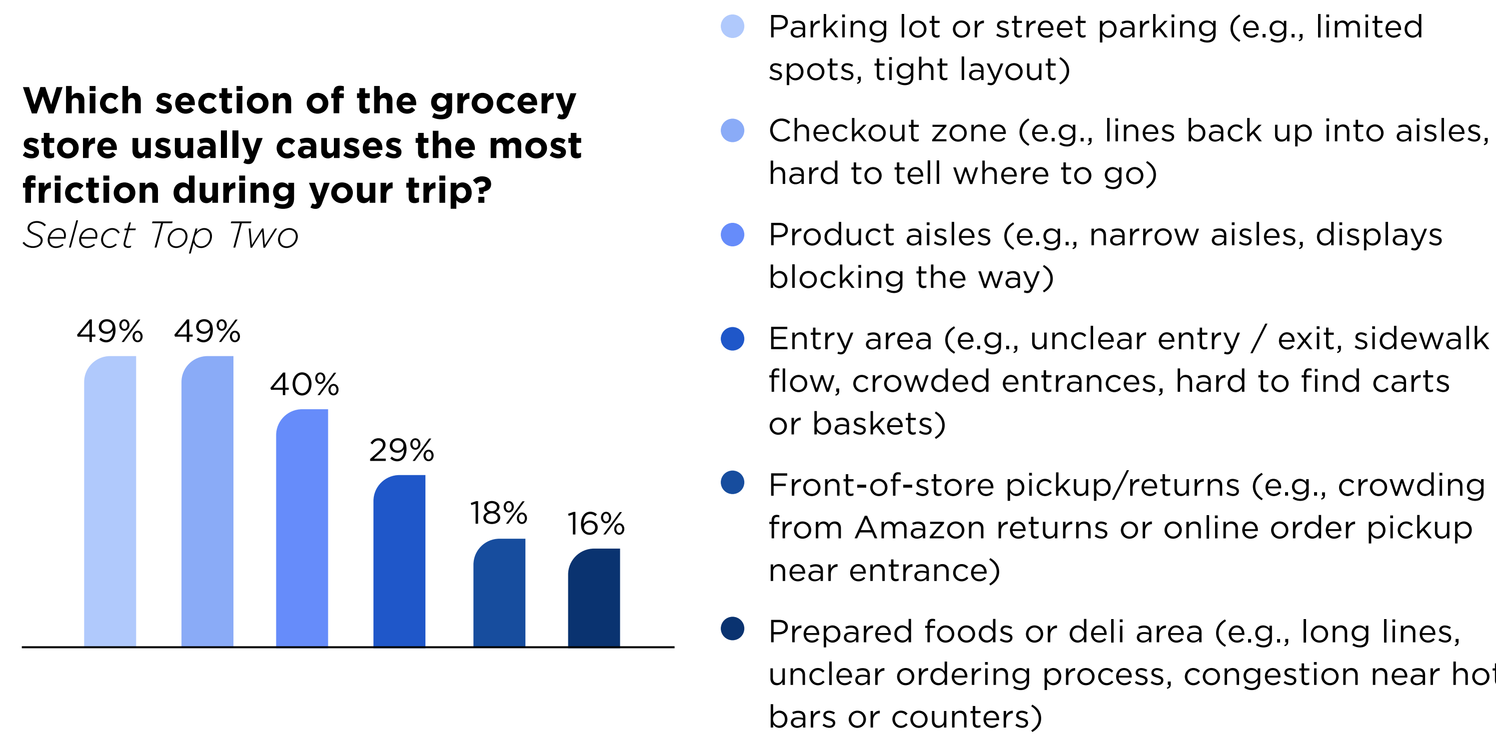
#1 Walmart
#2 TARGET
#3 ALDI

*Costco omitted as they are a current client

SECTION 3: THE FULL JOURNEY

From Parking Lot to Checkout

Which section of the grocery store usually causes the most friction during your trip?
Select Top Two

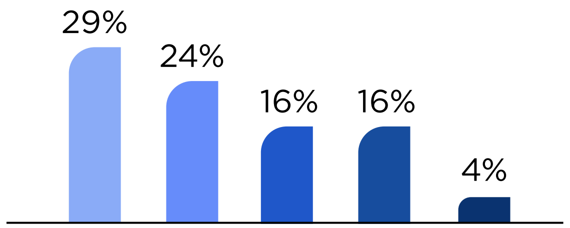


Friction points at both the start and finish of the grocery trip create frustration for shoppers everywhere, affecting their overall experience and loyalty.

The grocery shopping experience often begins and ends with frustration, and for many, parking is the first hurdle. Nearly half of shoppers cite limited or tight parking as a major pain point, an issue that's become almost infamous at the Trader Joe's in LA's Silver Lake neighborhood. That lot is so disliked it has inspired TikTok parodies, angry threads, and heated Google reviews*. An equal 49% of shoppers also point to the checkout area as a source of stress, where confusing line flows and crowding make for a difficult end to the trip. Inside the store, 2 in 5 struggle with narrow aisles or blocked pathways, and about a third say the entrance creates issues due to crowded entryways or hard-to-find carts. Geography plays a role too: around 60% of urban shoppers say parking is their biggest challenge, while 64% of rural shoppers report more issues at checkout, 2X the rate of urban shoppers. This presents an opportunity for grocers to rethink every step of the trip from outside the store to the final transaction. Improvements in lot design, clearer line systems, and better aisle management could reduce friction and deliver a smoother, more satisfying experience for every shopper, regardless of where they live.

*SFGATE 2025

Which part of the curbside or in-store pickup experience feels most confusing, poorly set up, or disruptive to the shopping experience? *Select One*



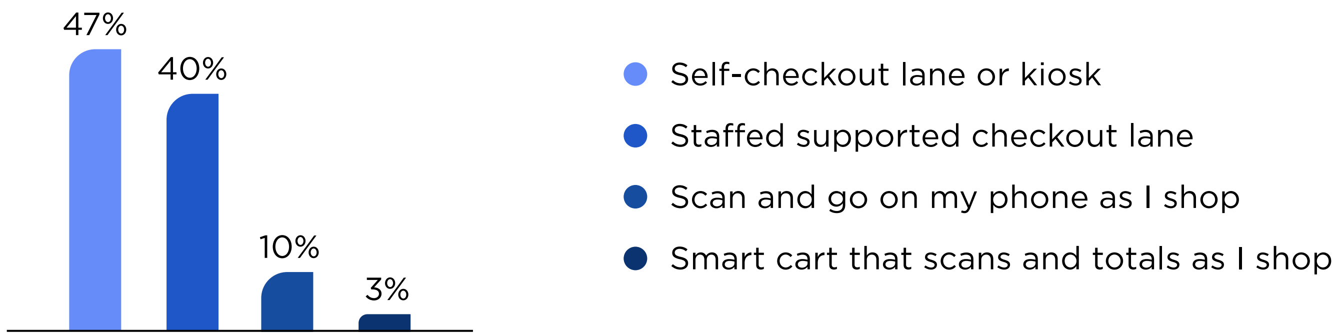
- I've never used curbside or in-store pickup
- It's unclear what to do or who to talk to when I arrive
- It's hard to tell where to park or pick up orders
- There's no clear signage or designated area to wait
- Pickup orders are left in customer areas instead of behind a counter or in lockers, creating congestion

Unclear processes and poor communication around pickup services significantly undermine the convenience shoppers expect.

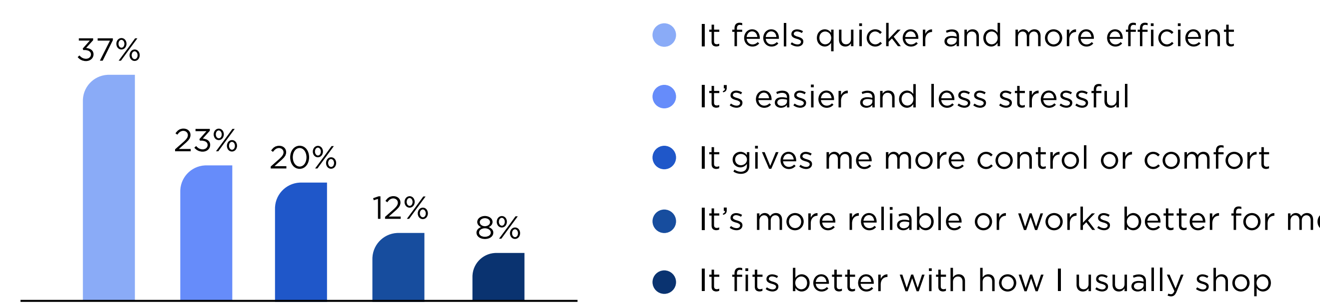
Curbside and in-store pickup are designed to make grocery shopping easier, but for many shoppers, the process still creates unnecessary confusion. Nearly 1 in 4 say they don't know what to do or who to talk to when they arrive, and many struggle to find the right place to park or wait, often due to poor signage. **This breakdown in communication turns what should be a convenience into a point of stress.** Major retailers like Walmart, Target, Albertsons, and Kroger all offer curbside options, and a 2024 study* ranked Albertsons highest for its performance among its own shoppers, suggesting that clarity and consistency make a measurable difference. Usage patterns also reveal generational and income-based divides. About a quarter of younger shoppers have never used pickup, while two-thirds of older shoppers have. High-income shoppers rely on it more often, pointing to differences in both need and familiarity. These gaps highlight an opportunity for grocers to simplify and standardize the pickup experience. Better signage, clearer instructions, and more visible staff support can reduce confusion and create a smoother process for all customers, regardless of age, income, or shopping habits.

*Ipsos 2024

Which checkout method do you usually prefer and use most often? *Select One*



What's the main reason you prefer your selected checkout method? *Select One*



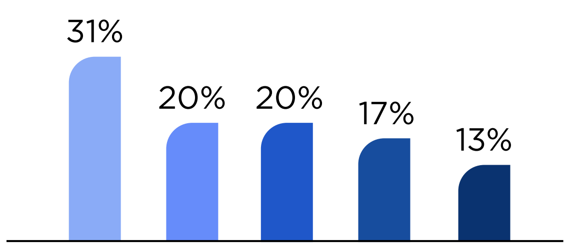
Self-checkout ranks highest overall, reflecting consumers' desire for efficiency, but grocery retailers should not underestimate the importance of supportive staff and creating a sense of ease.

- Nearly 50% of shoppers prefer self-checkout; however, 2 in 5 still choose staffed lanes. While convenience is key, personal interaction remains valuable, particularly when friction arises from delays or technical issues at self-checkout.
- Roughly 60% of Gen Z prefers self-checkout, while more than 50% of Boomers prefer a staff-supported journey. Overall, older shoppers are 2X more likely to select staffed checkout.
- Quick Trippers and Vibe Voyagers lean towards self-checkout for speed and control, while Conscious Consumers prefer a staff-supported checkout journey.

- Nearly 2 in 5 choose their checkout method because it is faster and more efficient.
- Comfort and ease follow closely behind as key drivers, especially among older shoppers.
- Design checkout zones with clear signage, intuitive flow, and a sense of calm to serve both speed-seekers and those who prioritize a stress-free experience.

Offering both clear self-checkout options and attentive staff support can meet the needs of multiple generations. Flexible checkout models allow shoppers to choose based on their preferences, not limitations.

What would make the overall checkout feel smoother for you? *Select One*



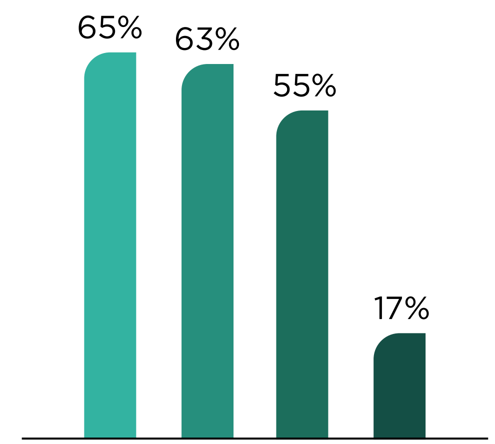
- Separate lines for quick trips vs. big grocery hauls
- More dedicated bagging space
- Clearer signs showing which checkout options are available
- Staff nearby and easy to ask for help
- Nothing: I'm happy with the checkout experience

Checkout is not one size fits all, and the differences in shopper needs, from speed to support, directly shape how smooth or challenging the experience feels.

The checkout experience is a critical moment in the grocery trip, and what makes it feel smooth depends on how shoppers approach it. More than one-third say having separate lanes for small baskets versus full carts would improve the process, while another 20% want clearer signage and more dedicated bagging space. Self-checkout users, in particular, are more likely to call out the need for faster lanes and better bagging areas, with nearly a third pointing to these as top improvements. Shoppers using staffed lanes, on the other hand, tend to prioritize knowing where to go and being able to get help when needed. **These differences highlight that a single checkout layout cannot meet everyone's needs. What feels efficient to one shopper may feel chaotic to another.** That said, some retailers are finding the right balance. Among respondents, Walmart was most often cited as having the smoothest checkout experience, suggesting that layout, signage, and staffing play a meaningful role. There is an opportunity here for grocers to rethink checkout through a more flexible, shopper-centered lens, adapting to different trip types and expectations to leave a better final impression.

SECTION 4: THE SHOPPER EXPERIENCE

Design & Amenities



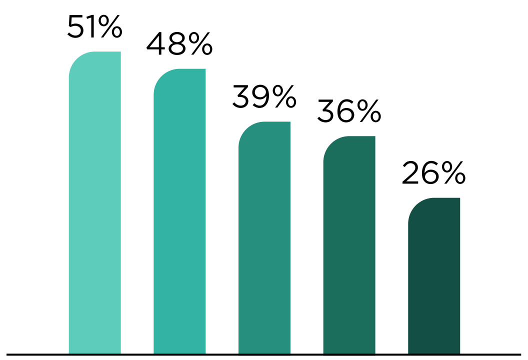
When space is limited, which layout feature makes the biggest difference in how easy it is to shop? *Select Top Two*

- Products placed in ways that make sense together
- Wider aisles and smoother in store flow
- Signs that clearly point to key sections or departments
- Separate return or pickup zone that doesn't block the entrance

A well-designed store layout not only makes shopping easier but also creates a natural flow that boosts both efficiency and the opportunity for shoppers to discover new products.

Layout becomes one of the most critical factors in how easy it is to shop. Nearly 70% percent of shoppers say products placed in logical groupings make the biggest difference, followed closely by 63% who value wider aisles and smoother in-store flow. Over half also want signage that clearly points to key sections or departments. These details do more than reduce friction, they shape the way people move through the store. **When products are grouped in logical ways, it helps shoppers quickly find what they came for. But when they're also organized around lifestyle-driven moments or needs, it opens the door to unplanned discovery and inspiration.** Wider aisles reduce bottlenecks and improve accessibility, especially in smaller store environments where flow can easily be disrupted. This creates an opportunity for grocers to treat layout not just as a logistical decision, but as a shopper experience strategy. Clear zoning, visible sightlines, and strategic product pairings improve navigation and bring inspiration to the shelf, making a trip smoother and more intuitive for the shopper.

Which of the following store design features make a grocery store feel more premium or thoughtfully designed, even if it's a lower cost or discount brand? *Select Top Two*

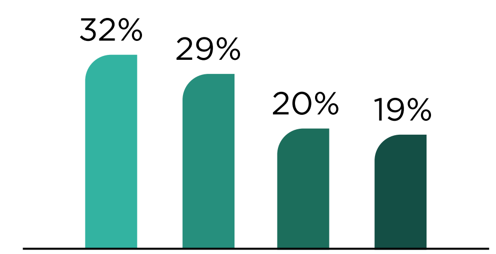


- Floors that look finished or polished, not plain concrete
- Signage that feels designed for the store, not generic
- Product displays at the ends of aisles that intentional and not random
- Softer, warmer lighting instead of bright overhead lights
- Higher quality finishes (e.g., natural looking materials)

Thoughtful design details play a powerful role in elevating the shopping experience and shaping how customers perceive the overall value of a grocery store.

What makes a grocery store feel premium isn't just the price; it's the design and environmental elements that shape how the space looks and feels. More than half of shoppers say clean, polished floors make a difference. Nearly as many notice when signage feels specific to the store rather than generic. Warm lighting and well-arranged displays at the end of aisles also help create a sense of care and attention. Retailers like Target and Trader Joe's were cited for having strong store personality and visually appealing design, demonstrating how intentional design can leave a lasting impression. While higher-income shoppers are more likely to associate good design with a premium experience, the effect isn't limited to them. Thoughtful design details like lighting, finishes, signage, and graphics do more than elevate the space. They signal value, build trust, and strengthen brand affinity. This is an opportunity to enhance brand perception across store formats by focusing on the elements that matter most to shoppers.

Which signature store features help you remember the brand or feel a sense of identity? *Select One*



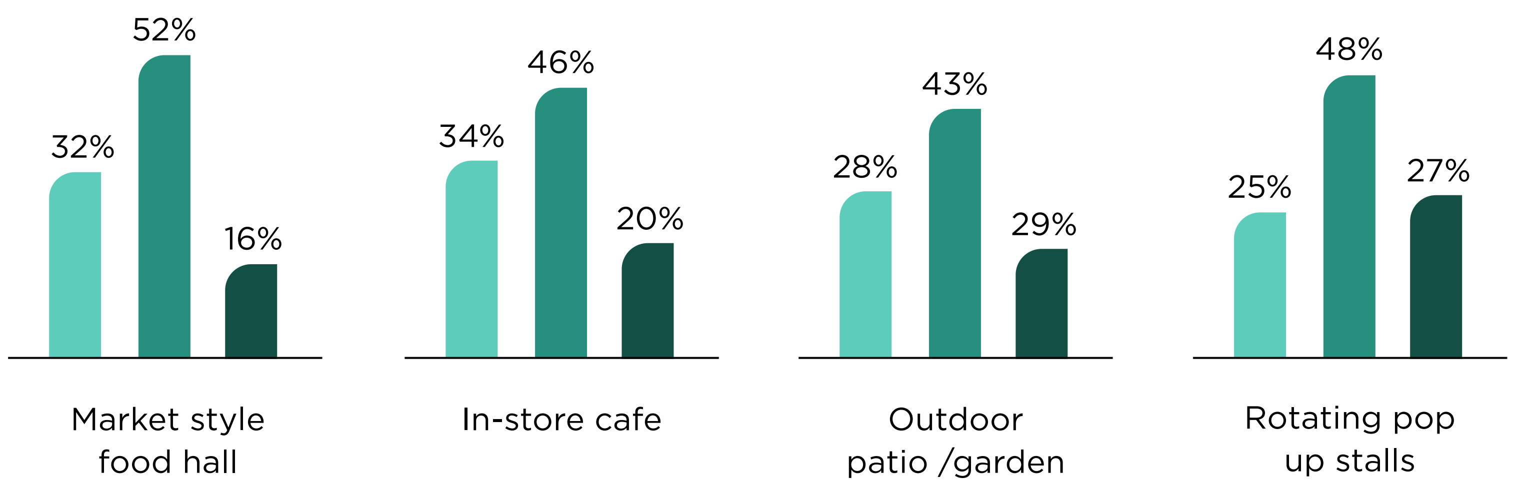
- Quirky or bold signage that feels part of the brand's personality (e.g., Trader Joe's hand-drawn signage, LIDL's yellow signage)
- Unique product zones (e.g., Whole Foods hot bar, ALDI aisle of shame)
- I don't notice these things: I'm just there to shop
- Seasonal updates that refresh how the store feels (i.e., holidays and celebrations like graduation)

Memorable design is more than decoration. It reinforces brand identity in ways that stick with shoppers long after they leave the store.

What makes a grocery store stand out in a crowded landscape often comes down to the details that reflect its personality. For 1 in 3 shoppers, bold or quirky signage is the feature that most helps them remember a store's brand, whether it's the hand-drawn signs at Trader Joe's or the signature yellow signage at LIDL. Nearly as many say unique product zones, like the ALDI aisle of shame or the Whole Foods hot bar, leave a lasting impression. **These elements don't just help with recall; they help shoppers feel a connection to the store's identity.** Shoppers who notice and respond to impactful signage and seasonal updates are also more likely to frequent brands like Target, Trader Joe's, and Whole Foods, all known for curating distinct, memorable experiences. Younger shoppers are particularly attuned to these cues, showing a stronger emotional response to playful branding than older generations. For grocers, there is an opportunity to create moments of recognition and brand connection through intentional visual and spatial storytelling. Even small design touches, when done consistently, can make a store feel more personal, memorable, and worth returning to.

Which of these in-store features would most encourage you to stay longer, explore more, or return often? *Rate how appealing each one is to you**

- **Very appealing:** I'd definitely use it or it would improve my shopping experience
- **Appealing:** I might use it if it's convenient or I had time
- **Not Appealing:** I wouldn't use it or it doesn't fit how I shop



Wine bar 27% 32% 41%

Lounge/work zone 25% 35% 39%

Kids' play area 25% 30% 46%

Community event area 21% 34% 45%

**Amenities are ranked by weighted average scores using the share of responses across Very Appealing, Appealing, and Not Appealing.*

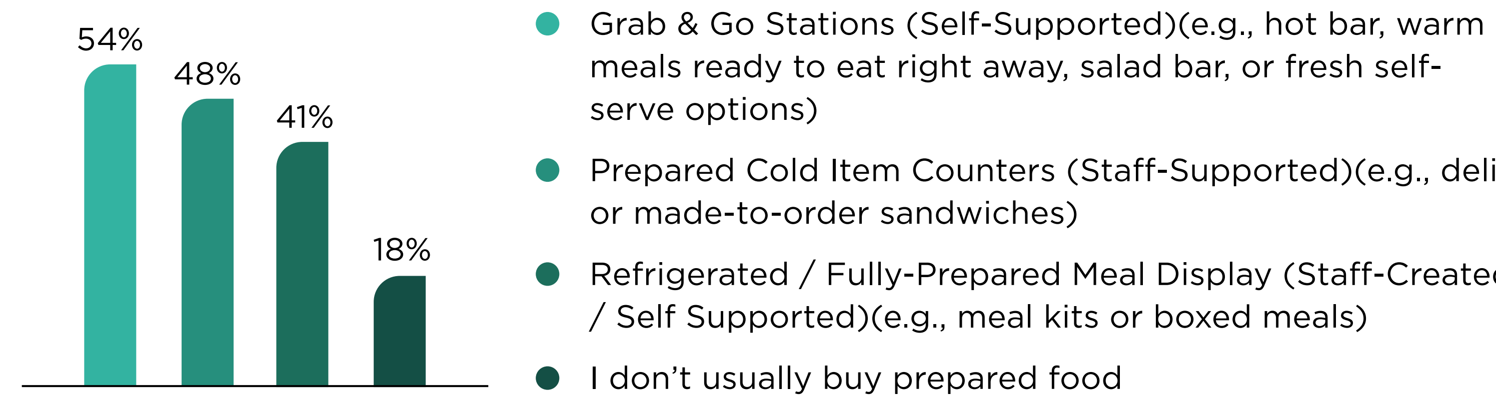
Shoppers' preferences for in-store experiences vary widely, with function driving appeal overall but lifestyle and demographics shaping desires for elevated and family-friendly amenities.

- Market-style food halls and in-store cafes are the most appealing upgrades, while kids' areas and community zones are the least desired, suggesting shoppers overall prioritize function over fun amenities; however, there are nuances.
- Urban respondents are more drawn to elevated experiences. They are 15% more likely than the total respondent pool to find wine bars very appealing and are more excited by community events compared to other geographic groups.

  Wegman's is tapping into consumers' growing appetite for elevated food experiences with *Next Door at Wegman's*, its new restaurant concept adjacent to the Astor Place store in NoHo, Manhattan. The menu features refined offerings like golden osetra caviar and Japanese wagyu striploin, offering a unique take on Japanese cuisine designed to surprise and delight.
- Younger consumers are more experience-driven, with shoppers under 45 being 3 to 5X more likely than those 61 and older to find pop-ups and community events very appealing and worth engaging with.
- Higher-income shoppers want more premium and family perks, with those earning $150K or more being 2.5X more likely to want wine bars and twice as likely to want kids' play areas.

Retailers can capitalize on these insights by tailoring store experiences. For example, they can focus on functional upgrades like food halls for broad appeal while incorporating premium and community features in urban locations and designing engaging events and family spaces to attract younger and higher-income shoppers. This balanced approach can enhance satisfaction and deepen customer connection across diverse shopper segments.

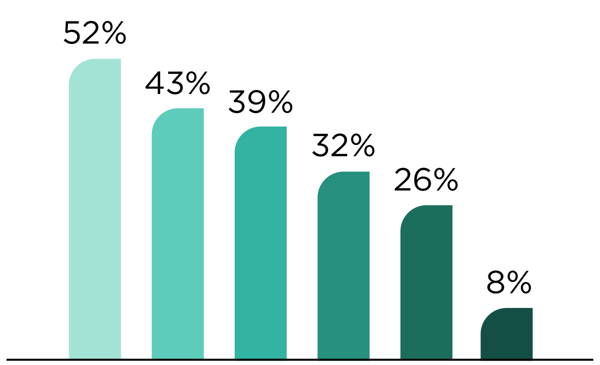
Which types of prepared food do you usually frequent in a grocery store?
Select All That Apply



Prepared food is becoming an essential part of the grocery experience, valued for the convenience, freshness, and flexibility it brings to shoppers’ routines.

Shoppers are engaging with prepared food in diverse ways. Over half of shoppers use self-serve Grab & Go stations, while 48% choose staff-supported cold counters and about 2 in 5 pick up fully prepared refrigerated meals like boxed dinners or meal kits. Among respondents, Whole Foods was most often cited as offering the best prepared food area, showing how strong presentation and variety can elevate this part of the store. Gen Z shoppers are 2X as likely as Boomers to use Grab & Go, favoring speed and flexibility, while urban shoppers are more likely to engage with these options than rural ones (65% compared to 45%). **For grocers, the opportunity isn’t just to offer prepared food, but to make it a destination.** Clear labeling, regular rotation, and strong visual merchandising can turn these zones into everyday meal solutions, encouraging more frequent and purposeful visits.

What makes a grocery store's prepared food areas feel exciting or worth returning to?
Select Top Two

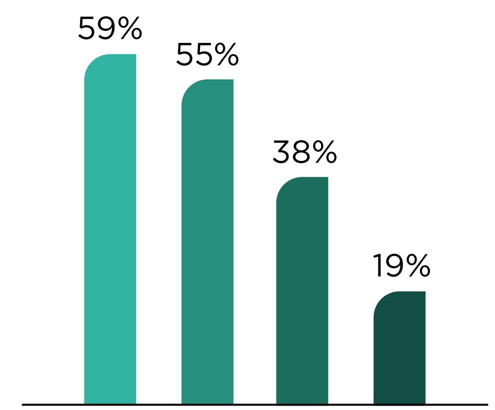


- The sights and smells make the area feel fresh and inviting (e.g., warm bread, rotisserie aroma)
- You can see the food being prepared / made (e.g., open kitchen, sandwich assembly, slicing, plating)
- There are free samples or interactive tastings
- You can serve yourself without waiting or talking to staff (e.g., hot bar, salad bar, grab and go case)
- Menu boards with clear prices and imagery of what's available
- There's a comfortable place to sit and eat (e.g., cafe style seating, counter stools)

Prepared foods create sensory moments that reinforce quality and strengthen shopper interest, delivering another layer of value in the store experience.

Prepared food zones combine multiple elements such as visual appeal, aroma, and live preparation that catch shoppers' attention and invite exploration. More than half of shoppers say the sights and smells alone make these areas feel fresh and inviting. Another 43% say seeing food made in real time through open kitchens or staffed counters adds energy and credibility. Free samples and interactive tastings also matter, with 2 in 5 respondents selecting them as key to creating an engaging, memorable experience. **These moments let shoppers see the care and commitment behind the food and encourage them to stay longer and come back more often.** Just as Costco is known for its samples and fresh bakery scents that draw shoppers deeper into the store, grocers have an opportunity to turn prepared food zones into signature moments. Thoughtful design in these areas means arranging the layout for maximum visibility and flow, incorporating open preparation spaces that engage and connect, and offering accessible, approachable tastings that invite customers with minimal effort. Together, these features can spark joy and make routine visits feel like something more.

Which store features help you feel connected to the local community?
Select Up To Two

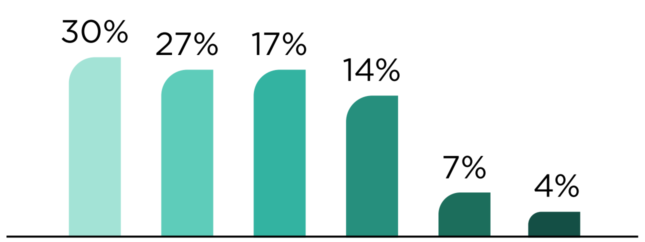


- Local product selection or partnerships with nearby vendors
- Signage that highlights community impact (e.g., posters for community events, community exchange, local artists / businesses)
- Events or classes hosted with local businesses or organizations
- Murals, photos, or design details that reflect local culture or history

Shoppers are more loyal to grocery stores that foster strong local connections, especially younger generations, urban dwellers, and values-driven consumers.

Today's shoppers want more than just efficiency; they're looking for connection. Nearly 60% say local products or partnerships with nearby vendors help them feel more rooted in their community, and over a third say those local touches directly influence where they choose to shop. This connection is especially strong among Millennials, Gen Z, and Conscious Consumers, with more than half of Conscious Consumers saying localized features matter most. Urban shoppers feel it more acutely too, with half pointing to community-focused elements as key drivers of connection, compared to 34% in rural areas and 28% in the suburbs. Signage that highlights local impact and events with community partners also play a role, making the store feel like part of something bigger. While Meal Grabbers are less likely to prioritize local, they're more open to it when it leads to food discovery. Trader Joe's is often pointed to as an example of a store that gets this balance right, weaving local flavor into a consistent brand experience. For grocers, this is a chance to turn familiarity into loyalty by making local partnerships more visible, creating opportunities for engagement, and tying the store more closely to the community it serves.

Which store design or layout choices signal that a grocery store is committed to sustainability? *Select One*



- Refill or bulk stations that reduce packaging
- Energy-saving or green building features (e.g., refrigerator motion censored lighting, solar panels, skylights)
- Compost/recycling areas with clear signage
- Sustainability is not important for me
- Use of reclaimed or natural materials in walls, shelving, or furniture
- Indoor greenery

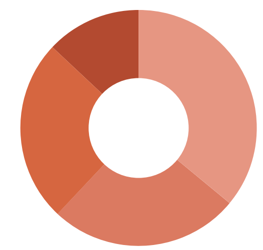
Sustainability signals embedded in store design play a powerful role in shaping shopper perceptions and fostering long-term loyalty by demonstrating a retailer's genuine commitment to environmental responsibility.

Shoppers today are increasingly aware of their environmental impact, and the design choices within a grocery store send powerful signals about its commitment to sustainability. Respondents were almost evenly split on what they consider the strongest indicators: about one-third highlighted refill or bulk stations that reduce packaging waste, while a similar number pointed to energy-saving features like motion-sensored lighting in refrigerators and other green building elements. These sustainability investments resonate most with Gen Z shoppers, who place greater priority on eco-friendly practices when choosing where to shop. Customers of retailers such as Trader Joe's and Whole Foods also value these design features highly, as these brands are widely recognized for leading in sustainable innovation. For grocers, clearly showcasing sustainability efforts and making taking action easy and accessible offers an important opportunity to differentiate their brand and build deeper trust with consumers. By expanding refill options, investing in energy-efficient technology, and communicating these initiatives transparently, stores can attract environmentally conscious shoppers across demographics. This approach not only supports a healthier planet but also fosters loyalty and positions grocery retail for a more sustainable future.

SECTION 5: SMART SHOPPING

The Role of Technology

Which in-store technology would make grocery shopping easier or more enjoyable? *Select One*

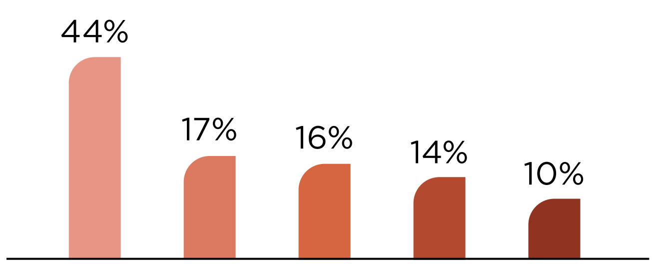


- **36%,** Smart cart that scans items and shows your total as you shop
- **26%,** Digital shelf tags that show live prices, deals, and product info
- **25%,** Navigational tool that helps you find where items are in the store (on a screen or in an app)
- **13%,** Kiosk in-store to order fresh food like deli or bakery items

In-store technology is transforming grocery shopping by offering new ways to enhance ease, speed, and shopper engagement.

Shoppers are open to technology that simplifies and enhances their grocery experience, though no single solution has yet emerged as a clear favorite. Nearly 40% of respondents favor smart carts that scan items and display running totals, providing transparency and speed. Digital shelf tags showing live prices and product details appeal to 1 in 3 shoppers, as do navigational tools via screens or apps that help locate items quickly. While these technologies are not yet widely adopted, they reveal important opportunities for grocers to innovate around ease and information. For example, Wegmans is piloting Instacart's Caper Carts, which let customers track their spending in real time, log into their grocer's loyalty program account, bag items as they shop, and pay directly from the cart. **By embracing and refining digital offerings in-store, retailers can meet diverse shopper needs, reduce friction, and deliver a seamless, engaging experience aligned with evolving consumer expectations.**

In what ways does in store technology negatively affect your grocery shopping experience? *Select One*



- It's frustrating when the technology doesn't work properly
- It feels impersonal or reduces helpful interactions with staff
- Feels like it's more about cutting staff than helping shoppers
- It adds more time and makes experience more complicated
- No clear option to skip the technology

Reliable technology is crucial for improving the grocery shopping experience because it ensures smooth, frustration-free interactions that build shopper trust and encourage repeat visits.

Technology in grocery needs to serve both shoppers and store teams. When it works well, it has the potential to reduce friction at every step by speeding up checkout, simplifying product discovery, and helping associates answer questions or restock efficiently. But when systems are slow or unreliable, they do the opposite, creating stress and eroding trust. In fact, 44% of shoppers cite malfunctioning technology as a top frustration. **This makes reliability a baseline requirement, not a bonus.** Equally important is how well tools are integrated into the store experience. Whether it is mobile pay for customers or task management tools for staff, the right technology is seamless, intuitive, and directly tied to smoother operations and stronger service. By focusing on practical, dependable solutions that support both sides of the experience, grocers can deliver meaningful improvements that drive satisfaction and repeat visits.

SECTION 6: CONCLUSION & KEY TAKEAWAYS

SHAPING THE FUTURE OF GROCERY: MEETING EVOLVING SHOPPER EXPECTATIONS

Grocery shopping is not just a transaction. It reflects how people live, what they value, and the environments where they want to spend time. Price and convenience remain essential, but they are now the baseline. What truly sets a store apart is how well it blends efficiency with meaningful experience and shows clear relevance to shoppers' lifestyles. Design elements like clear signage and intuitive layouts, along with local partnerships and smart technology, aren't just nice touches; they actively shape how shoppers experience and remember the brand. To stay competitive and build loyalty, grocers must take a holistic approach to the in-store experience. The following takeaways highlight where shopper expectations are headed and how retailers can meet them with clarity, focus, and practical innovation.

5 Key Go-Forward Brand Strategies

Bookend the experience with design and efficiency

- Focus on the first and last five minutes of the shopper journey. Create a clearer, less congested point of arrival, simplify pickup with intuitive signage, and support all shopper types with hybrid checkout options. These touchpoints shape the experience and shouldn't become bottlenecks.

Layout and signage influence perceived value

- Design directly impacts how premium or efficient a store feels. Use materiality, lighting, and wayfinding to shift perception without raising price points. These cues set expectations and reinforce brand positioning.

Community design should feel specific, not generic

- Local identity resonates strongest with urban shoppers, but it matters everywhere. Highlight community ties through compelling visual storytelling, regional product features, and partnerships that feel authentic to the neighborhood.

Prepared foods enhance the overall experience

- Prepared foods may not be the main reason shoppers visit, but it strengthens the overall store experience. Make food zones feel intentional, visible, accessible, and seamlessly integrated into the store's flow.

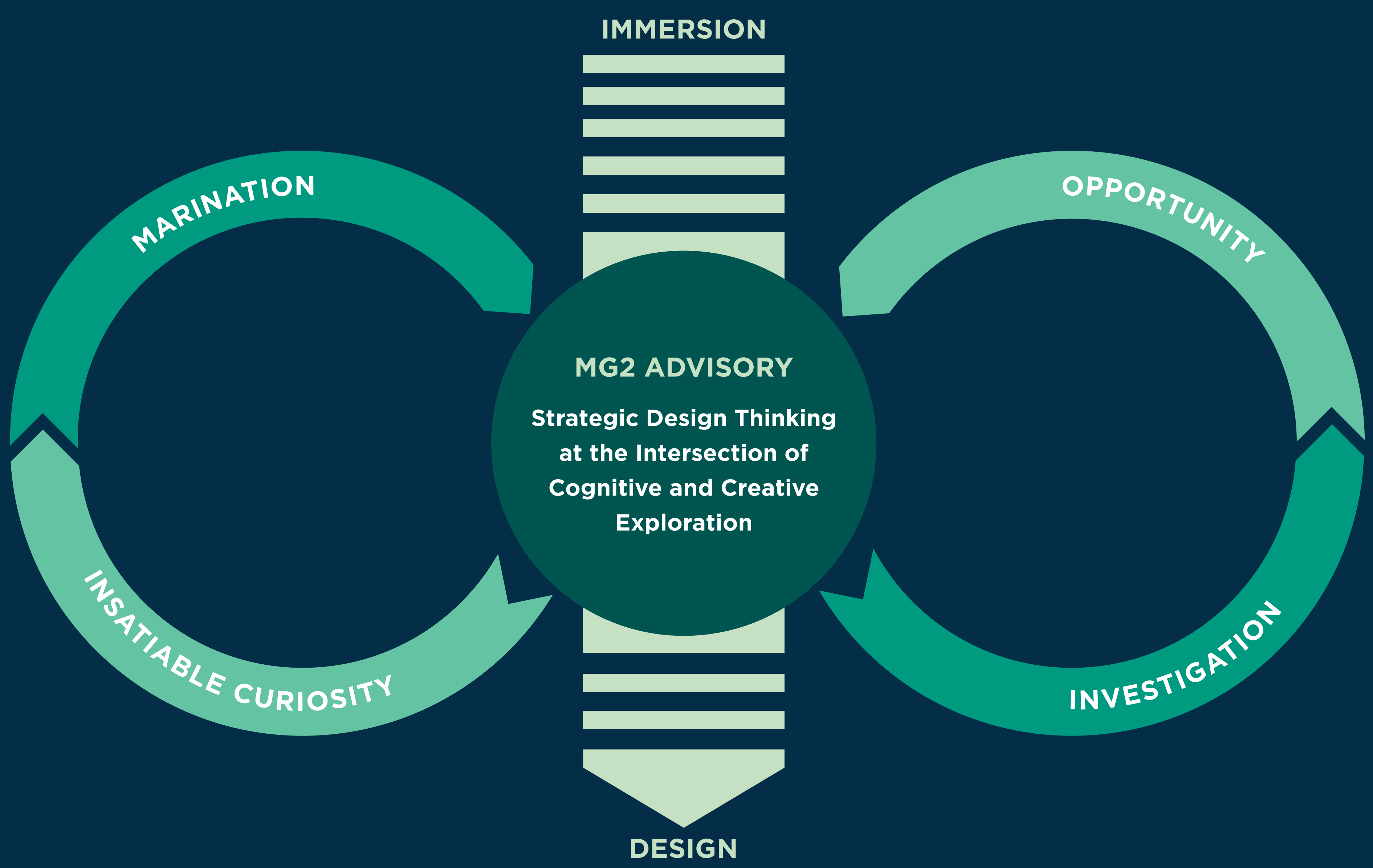
Make technology and sustainability work for the shopper

- Consumers want progress, but not at the cost of usability. Prioritize features that are both functional and easy to use, from refill stations to smart carts, and avoid anything that creates friction or slows the trip.

OUR FRAMEWORK

The ***I.M.I.O. Model*** is the foundation of our work, and it is a proven process for unlocking new strategic opportunities and competitive whitespace. The Model spans four phases and the following services:

- Macro trend analysis
- Behavioral insights
- Brand and operational analysis
- Qualitative studies
- Field studies
- SME interviews
- Competitive benchmarking
- Cultural and sociological research
- Targeted focus groups



INSIDE THE I.M.I.O. MODEL

Phase 1:
INSATIABLE CURIOSITY

Align on a foundational strategy by leveraging our constant investigation and analysis of human behaviors, cultural contexts and influences. We extract these insights and meld them with organizational data and insights to develop a vision for the project and set tactical goals.

Phase 2:
MARINATION

We analyze all available data to identify gaps and further areas of exploration and supplemental investigation. We then develop key questions to help us answer these questions and identify future opportunities for creative ideation.

Phase 3:
INVESTIGATION

We pursue various investigative pathways to decipher our holistic findings to support brand positioning and customer experiences. Through a combination of expert interviews, targeted focus groups, qualitative surveys, quantitative research and field studies, we create a more detailed picture of what consumers want and the current whitespace that exists.

Phase 4:
OPPORTUNITY

We create a comprehensive package including our findings and tailored recommendations for a go-forward strategy that addresses clients' decided objectives and measures for success. We also uncover additional opportunities for brand positioning and differentiation, and future iteration and optimization.

DISCOVERY PROCESS

RESEARCH & INSIGHTS

Market research

Behavioral research

Design research

CONCEPTUAL MAPPING

Create consumer personas

Illuminate affinities

Align with business metrics

DESIGN OPPORTUNITIES

User journeys

Key touchpoints

Story board options

IMPLEMENT, TEST, LEARN

Implement concepts

A/B test

Measure success

CASE STUDY: GROCERY

DRIVERS

Time scarcity

Instant-everything culture

Technology-driven expectations

Community identity

Human connection

MAJOR TRENDS

Quick-trip store formats

Hybrid checkout offerings

Smart store features

Localized storytelling

Stores as lifestyle hubs

NEEDS/WANTS

Fast, easy trips

Frictionless payments

Real-time product availability

Community connection

Features beyond groceries

PAIN POINTS

Inefficiencies throughout the journey

Long lines & slow technology

Confusing digital functionality

Local products not highlighted

Lack of amenities & uninspiring spaces

EXPERIENCE BLUEPRINT

Flexible pick up stations

Mobile pay & scan-and-go

Testing digital integration

Local vendor stories & visuals

Cafe, prepared foods, seating, & events

ITERATE

Reassess:

Redefine fast as habits & tech

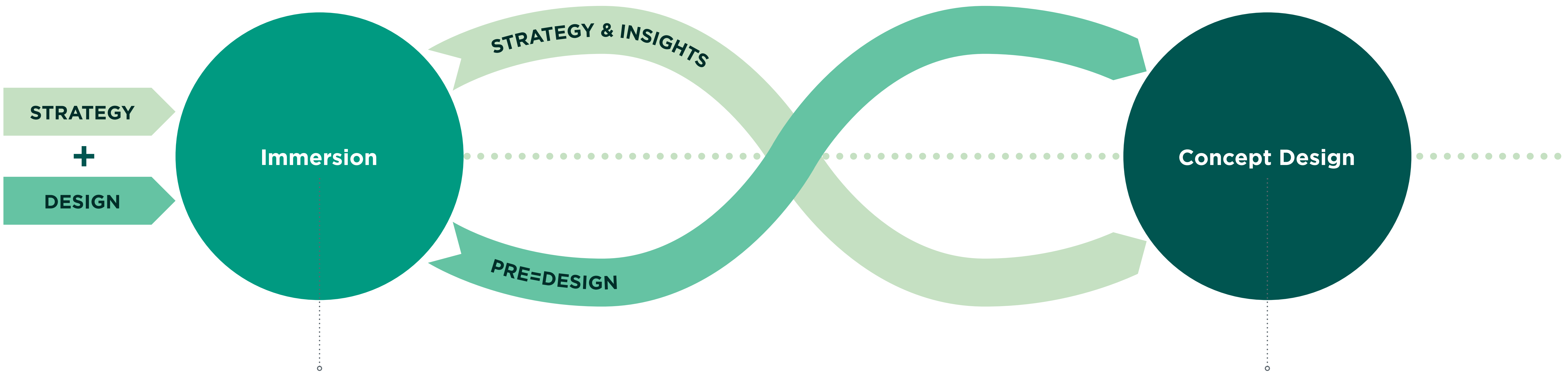
Optimize layout through insights

Track payments & wait tolerance

Reassess shopper-local ties

Align amenities to lifestyle trends

INTEGRATION WITH DESIGN TEAMS



MG2 Advisory's Role

Working in partnership with clients to understand their needs, goals, and challenges, we conduct audience research into behaviors and preferences, including targeted deep dive analysis to demystify and uncover opportunities for the go-forward user experience, as well as testing approaches to study the success of programming methodologies.

Design Team's Role

Informed by the data and insights revealed during the strategy phase, design works collaboratively with Advisory to manifest these findings through conceptual ideation, further realizing key experience elements and consumer touch points, to create a cohesive story through various visualization approaches, such as sketches and renderings.

MEET OUR TEAM

NICOLE POKORNY FORSTER
SENIOR STRATEGIST

MELISSA GONZALEZ
PRINCIPAL,
FOUNDER MG2 ADVISORY

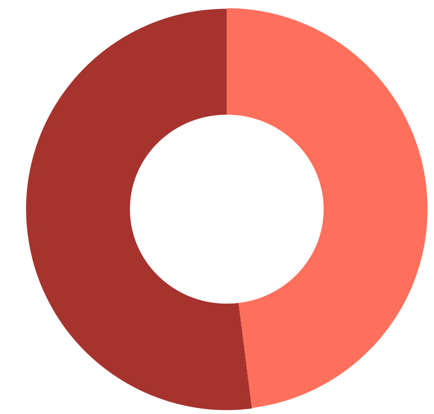
UMER CHAUDHRY
ANALYST

Respondent demographics

1,041 U.S. Respondents
August 2025

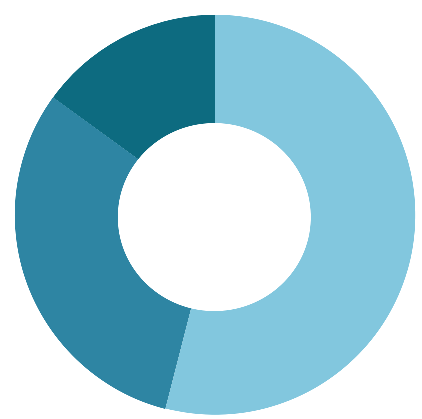
AGE GROUP

- **48%,** 18-22
- **52%,** 23-26



GENDER

- **48%,** Male
- **52%,** Female



COMMUNITY

- **54%,** Suburban
- **31%,** Urban
- **15%,** Rural

REGION

- **22%,** Northeast
- **8%,** Middle Atlantic
- **22%,** Southeast
- **11%,** Southwest
- **23%,** Midwest
- **3%,** Rocky Mountains
- **12%,** West Coast

LET'S CONTINUE THE CONVERSATION

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