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Grocery Trends & Consumer Buying Behaviors

Winter 2025/2026

Background & Objectives

Provoke Insights is a leader in research focused on branding, advertising, media, and content marketing strategies. Our biannual study uncovers how consumer attitudes and behaviors are evolving across a range of industries.

Now in its eleventh wave, this nationally representative study reveals how Americans shop, what drives their decisions, and how sustainability influences brand perception and loyalty. This wave also takes a closer look at the role of sustainably sourced products and uncovers which industries consumers consider the most and least sustainable.

The research is organized into 15 industry-specific reports that are easy to read and designed to provide quick, actionable insights. This report focuses on the grocery category, highlighting shifting shopping habits, evolving consumer priorities, and the role clean eating and sustainability plays in the purchasing decision.

Methodology

Provoke Insights conducted a 15-minute online survey among 1,500 Americans aged 21 to 65 in September 2025.

To ensure a representative sample of the U.S. population, Census data was used to guide a random stratified sampling approach, balancing key demographics such as household income, age, gender, geography, ethnicity, and presence of children in the household.

With this sample size, the results have a maximum margin of error of ±2.5% at a 95% confidence level.

Statistical significance testing was conducted at the 95% confidence level, with differences between subgroups highlighted in callout boxes within the graphs.

Key Findings

Health-Conscious Shoppers Drive Demand for Functional, Clean-Label Snacks

High-protein content and clean-label attributes like “no artificial additives” are leading health drivers in grocery and snack purchases, especially among health-conscious consumers. While shoppers are increasingly mindful of sugar, there is a clear preference for reduced sugar over sugar-free options, suggesting brands should focus on moderation rather than elimination. This aligns particularly well with snack manufacturers who want to offer an opportunity to innovate with better-for-you products that don’t sacrifice taste.

Skepticism Toward Packaged Food Claims Underscores Trust Challenge

Despite bold labeling, nearly one-quarter of consumers remain skeptical about claims like "no artificial flavors" and "sustainably sourced ingredients." Gen Z leads in this distrust, especially toward sugar-free and artificial-free labels, even though they are often the target audience for these claims. For brands in both packaged food and produce, this underscores a critical need for greater transparency and third-party verification to strengthen consumer trust and differentiate from competitors.

Shoppers Will Pay More, But Only When It Aligns with Values

Health-conscious consumers show strong willingness to pay more for products that meet their standards, especially when it comes to high-quality ingredients, cleaner eating, and health priorities. However, sustainable practices, while valued, trail behind other purchase drivers. This presents an opportunity for brands to lead with product quality and health benefits, while layering in sustainability messaging as a secondary, reinforcing value.

Fresh Produce Preferences Are Shaped by Locality and Practicality

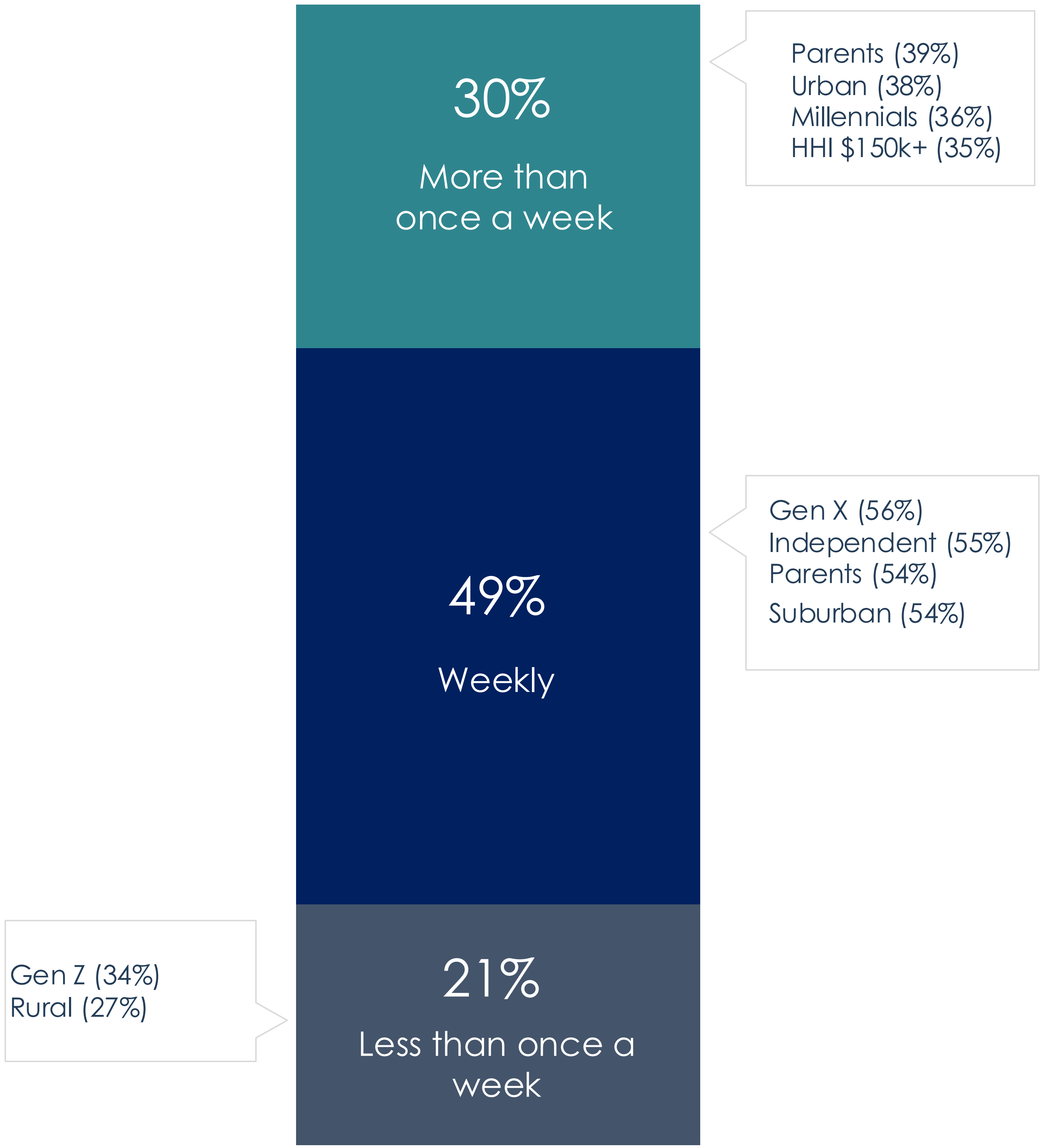
Nearly half of shoppers, especially Boomers, parents, and high-income consumers, prioritize locally grown produce, with organic also ranking high in influence. However, price, short shelf life, and seasonal availability remain key barriers to purchase. Produce brands and retailers can respond by improving communication around freshness, extending shelf life where possible, and reinforcing the value of local sourcing to enhance consumer confidence and drive loyalty.

Detailed Findings

How, Where, and Why Shoppers Buy Groceries

Grocery Trip Frequency

About half of Americans visit the grocery store each week. Parents, millennials, affluent shoppers, and people living in metropolitan areas shop more frequently.

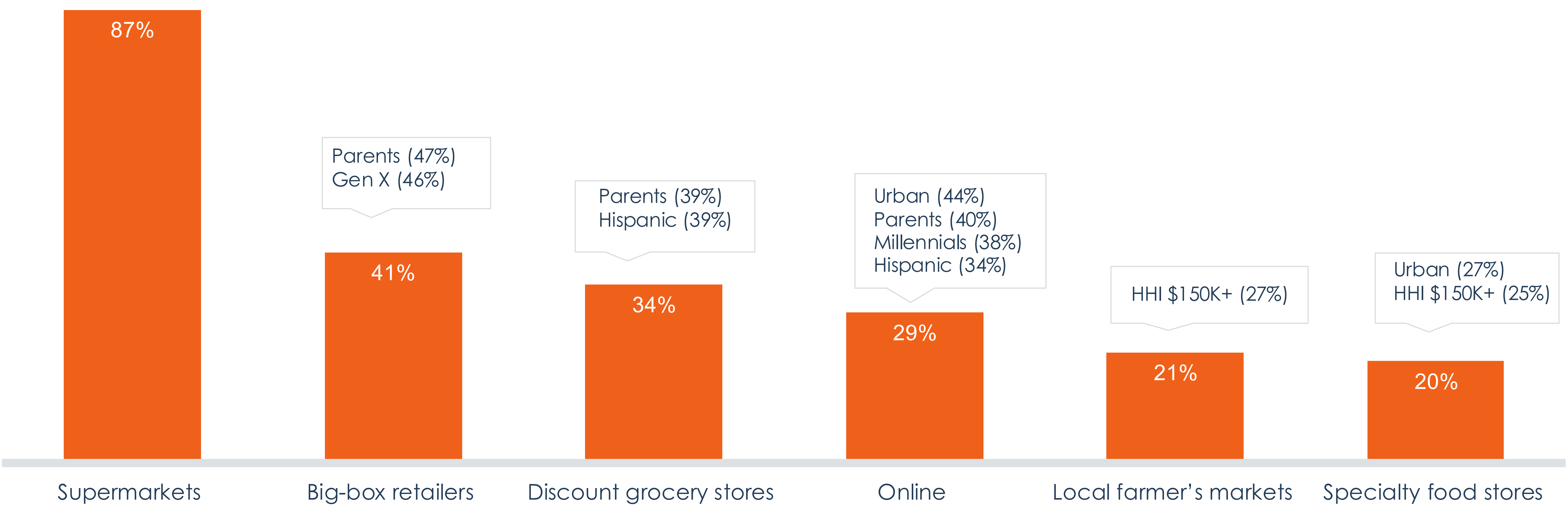


Q. How often do you grocery shop?

Base: All qualified respondents (N=1,500)

Where Americans are Buying Groceries

While supermarkets still dominate America's grocery scene, the playing field is shifting. Parents are branching out buying groceries at big-box retailers, discount stores, and online.

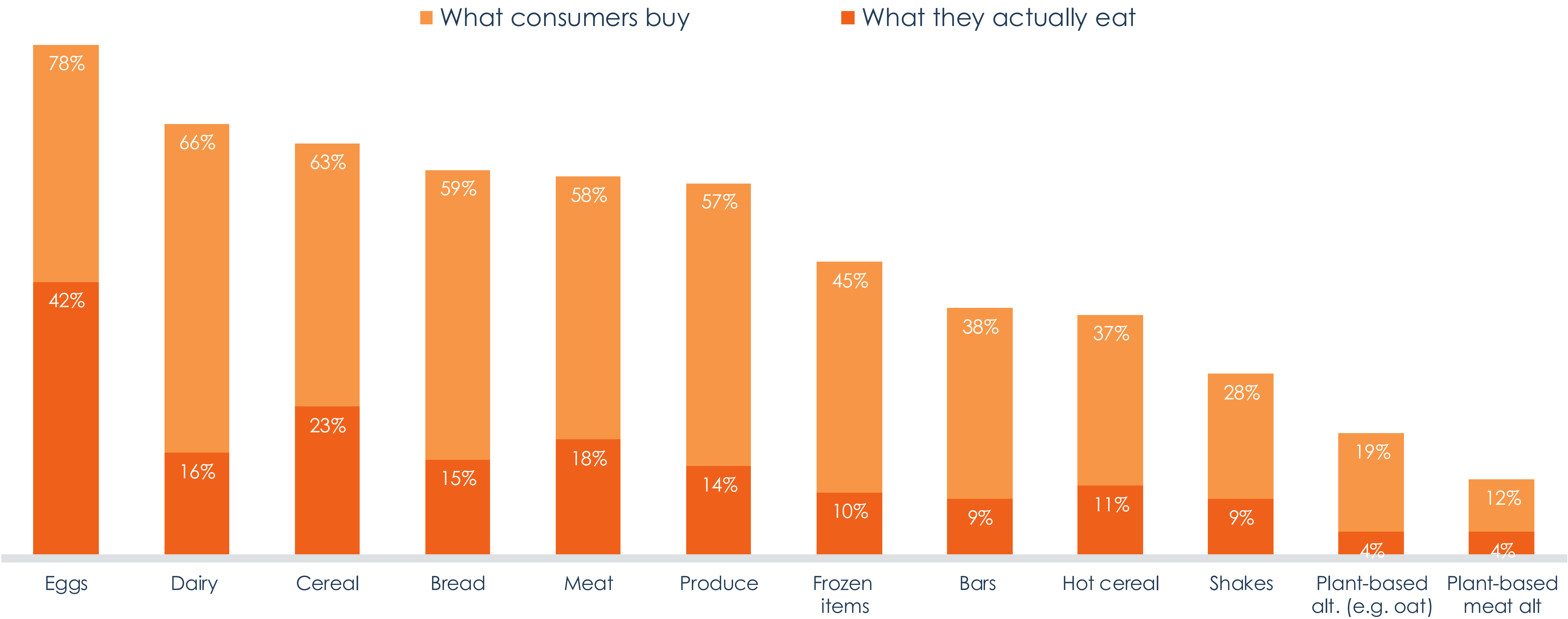


Q. What types of stores do you usually shop at for groceries?

Base: Purchased groceries (n=1,496)

Breakfast for the Family vs. Fueling Yourself

Eggs are typically purchased and eaten by the same person, while cereal is more often bought for others in the household.



Q. What types of foods are you typically purchasing for breakfast in your household? (Select all that apply)
Q. Which of these foods are you eating most often for breakfast? (Select up to two)

Base: Purchased groceries (n=1,496)

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Breakfast by Generation: Who's Eating What?

Eggs dominate as the top breakfast choice across all generations, with Gen X showing the highest consumption. However, distinct generational preferences emerge with Gen Z and Millennials favoring meat/protein, while Baby Boomers lean toward traditional staples like breakfast cereal, pastries, and hot cereal, reflecting more classic breakfast habits.

	Gen Z	Millennials	Gen X	Baby Boomers
Base Size (n=1,500)	231	605	447	217
Eggs	35%	42%	45%	42%
Meat/protein	26%	18%	16%	12%
Breakfast cereal	26%	21%	23%	28%
Dairy	16%	13%	17%	20%
Breads/pastries	15%	15%	12%	22%
Fresh Produce	13%	13%	15%	13%
Frozen breakfast items	11%	12%	10%	4%
Breakfast bars	10%	11%	9%	6%
Health shakes or smoothies	10%	10%	10%	6%
Hot cereal	7%	11%	10%	15%

*Excluded less than 5%

Q. Which of these foods are you eating most often for breakfast? (Select up to two)

Base: Purchased groceries (n=1,496)

Who’s Buying and Eating Cereal

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Purchasing Cereal

Overall 63%

- Parents (69%)
- Black (66%)
- Democrats (67%)

Eating Cereal

Overall 23%

- Boomers (28%)
- Democrats (27%)

Q. What types of foods are you typically purchasing for breakfast in your household? (Select all that apply)
Q. Which of these foods are you eating most often for breakfast? (Select up to two)

Base: Purchased groceries (n=1,496)

Wellness is Winning: Health Priorities in the Grocery Aisle

Decoding Healthy: Food Labels That Win at the Shelf

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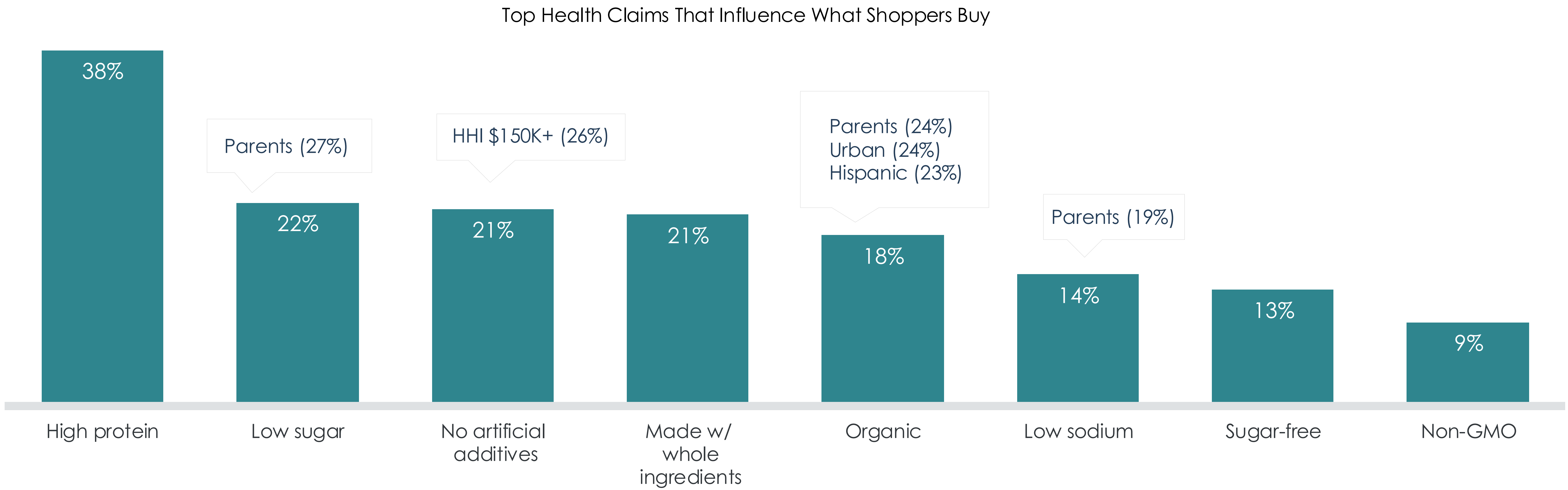
Most Americans prioritize high-protein options when grocery shopping, while parents are more likely to seek out low-sugar and organic foods.



Q. When purchasing food, which health-related attribute most influences your purchase decision? (Select up to two)

Base: Purchased groceries (n=1,496)

Food Labels That Win at the Shelf By Generation

Boomers focused on reducing sugar, sodium, and artificial additives, while Millennials lead in choosing organic options. Gen Z is the least likely to seek out health-related food attributes.

	Gen Z	Millennials	Gen X	Baby Boomers
Base Purchase Groceries (n=1,496)	229	603	447	217
High protein	37%	40%	39%	32%
Organic	20%	23%	14%	13%
No artificial additives/preservatives	20%	19%	21%	28%
Lower sugar	18%	18%	26%	29%
Made with whole ingredients	18%	21%	19%	24%
Lower sodium	10%	11%	18%	18%
Non-GMO	10%	11%	7%	8%
Sugar-free	11%	15%	11%	10%
None of these	19%	11%	15%	12%

Q. When purchasing food, which health-related attribute most influences your purchase decision? (Select up to two)

What Food Labels Drives Drive Snack Purchases

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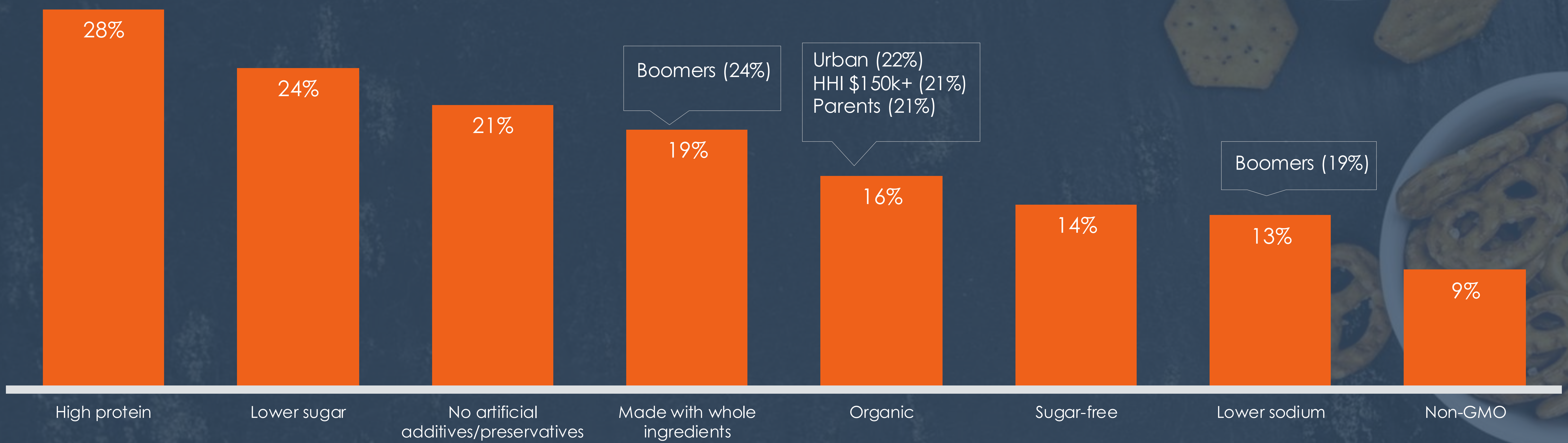
Many consumers choose indulgent snacks with high-protein or low sugar, while parents are especially drawn to organic options.

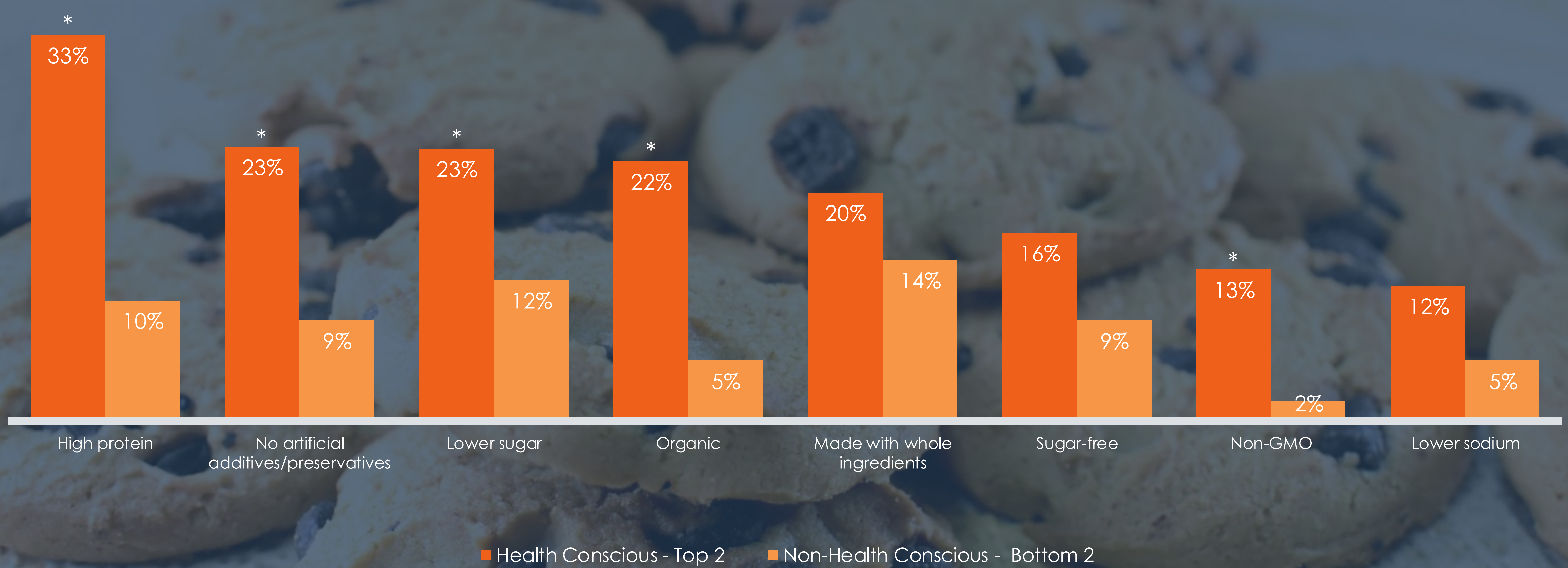


Q. When it comes to indulgent snacking, which health-related attribute most influences your purchase decision? (Select up to two)

Base: Purchased groceries (n=1,496)

What Snacking Food Labels Entice the Health Conscious?

High-protein and no-additive snacks are top picks for health-conscious consumers. Lower-sugar options are appealing, but sugar-free snacks are less enticing, showing a clear preference for reduction over elimination.



* Indicates a significant difference

Q. When it comes to indulgent snacking, which health-related attribute most influences your purchase decision? (Select up to two)

Base: Purchased groceries (n=1,496)

Willing to **Pay More** for Grocery Products Meeting Key Needs

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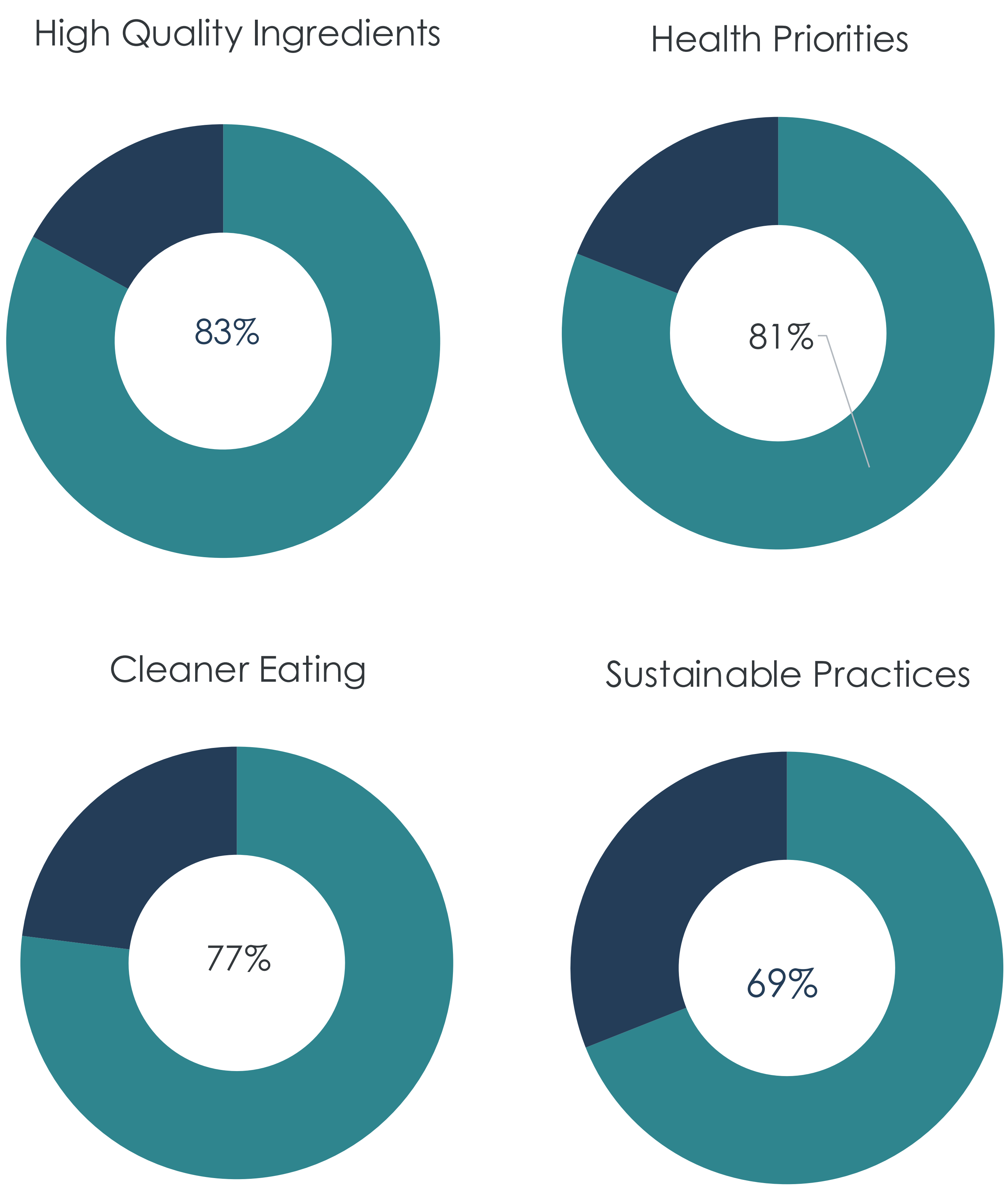
Most shoppers are open to paying more for grocery products that contain high-quality ingredients or align with their health priorities. Although two-thirds express openness to spending extra for sustainable options, this percentage is lower compared to the others.

Willing to Pay More

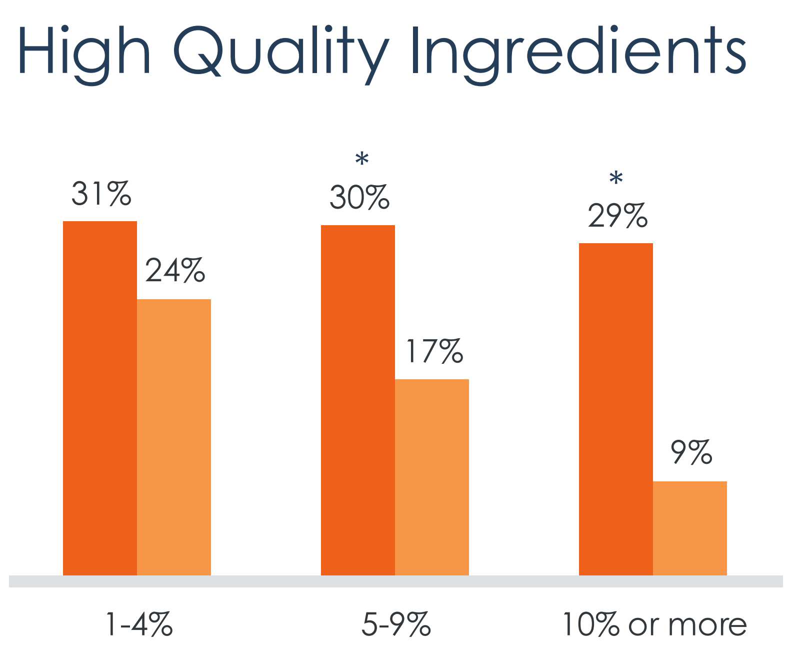


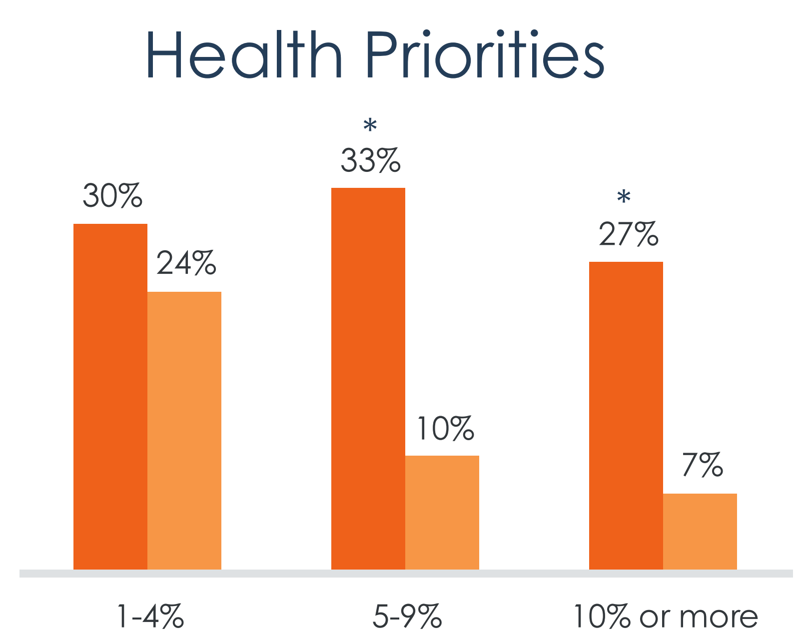
Q. How much more would you be willing to pay for grocery products that help meet the following needs? (Select one for each attribute)

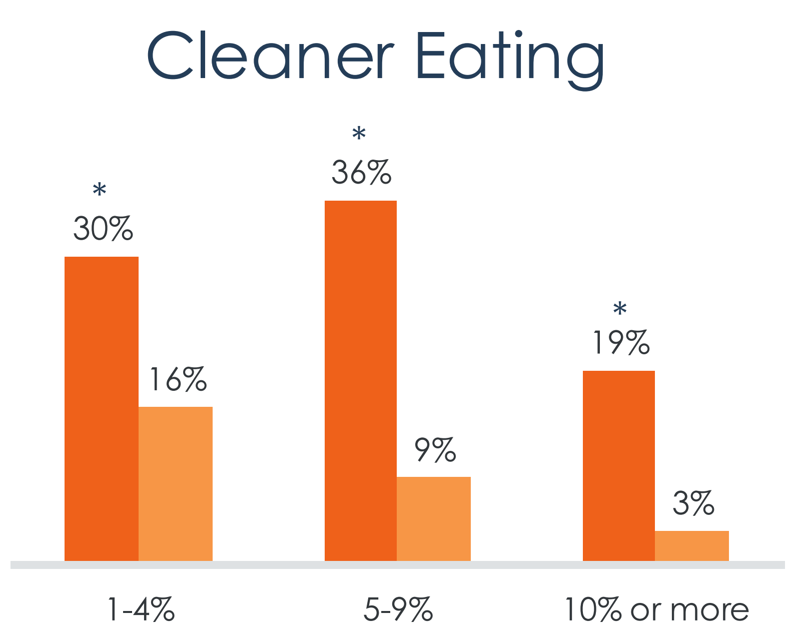
Base: Purchased groceries (n=1,496)

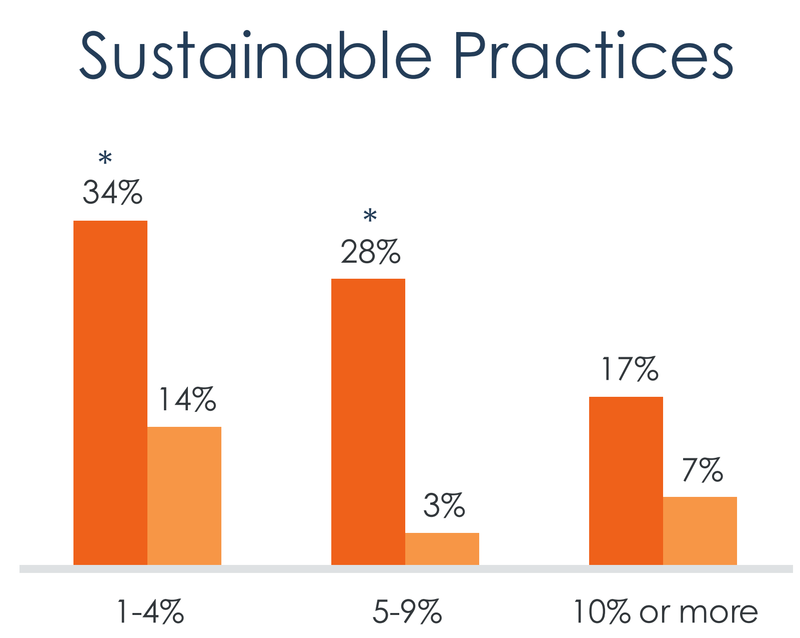
Health Conscious Will Pay More

Health-conscious consumers are significantly more willing to pay a premium for grocery products that align with their values, particularly for quality ingredients, cleaner eating and health priorities. In contrast, non-health-conscious shoppers show far less willingness to pay extra.









* Indicates a significant difference

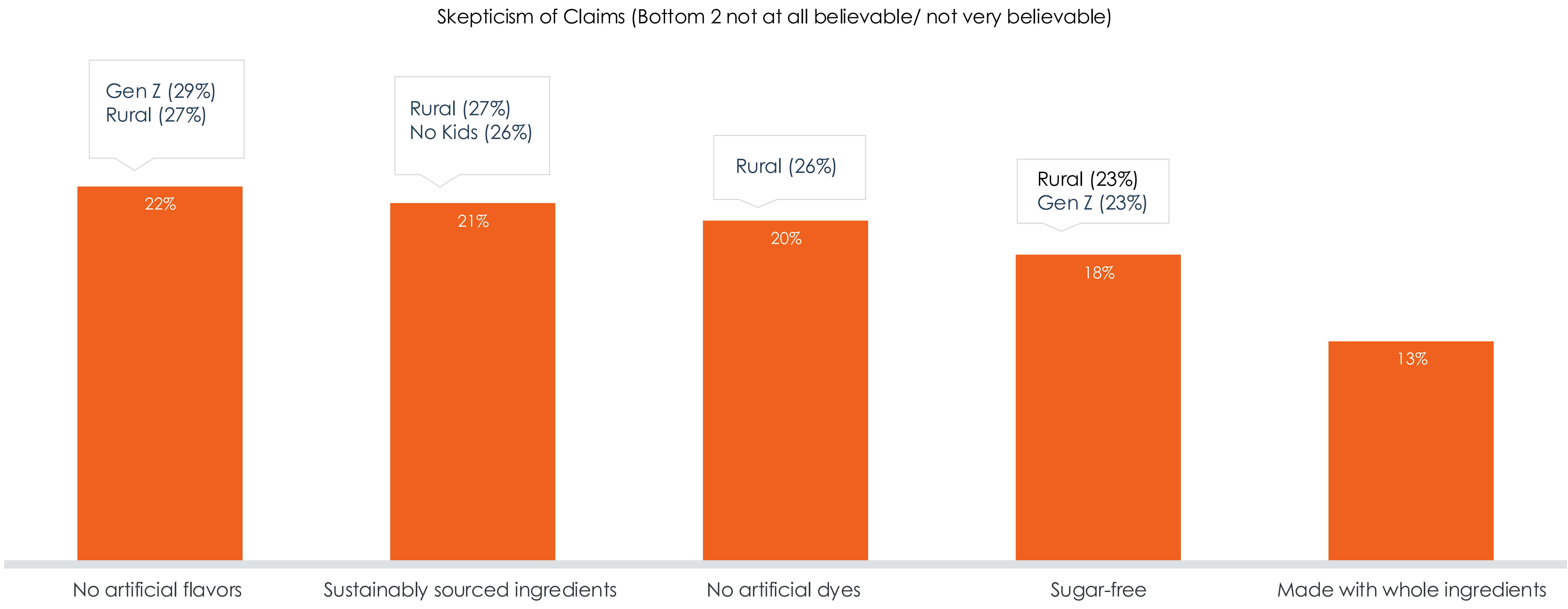
Health-conscious - Top 2 Non- Health conscious - Bottom 2

Q. How much more would you be willing to pay for grocery products that help meet the following needs? (Select one for each attribute)

Base sizes vary

Skepticism Towards Food Claims

Despite on-pack claims, nearly one-quarter of consumers remain skeptical about the authenticity of statements like "no artificial flavors or dyes" and "sustainably sourced ingredients." Gen Z emerges as the most distrustful, particularly questioning products labeled as eliminating artificial flavors or being sugar-free.

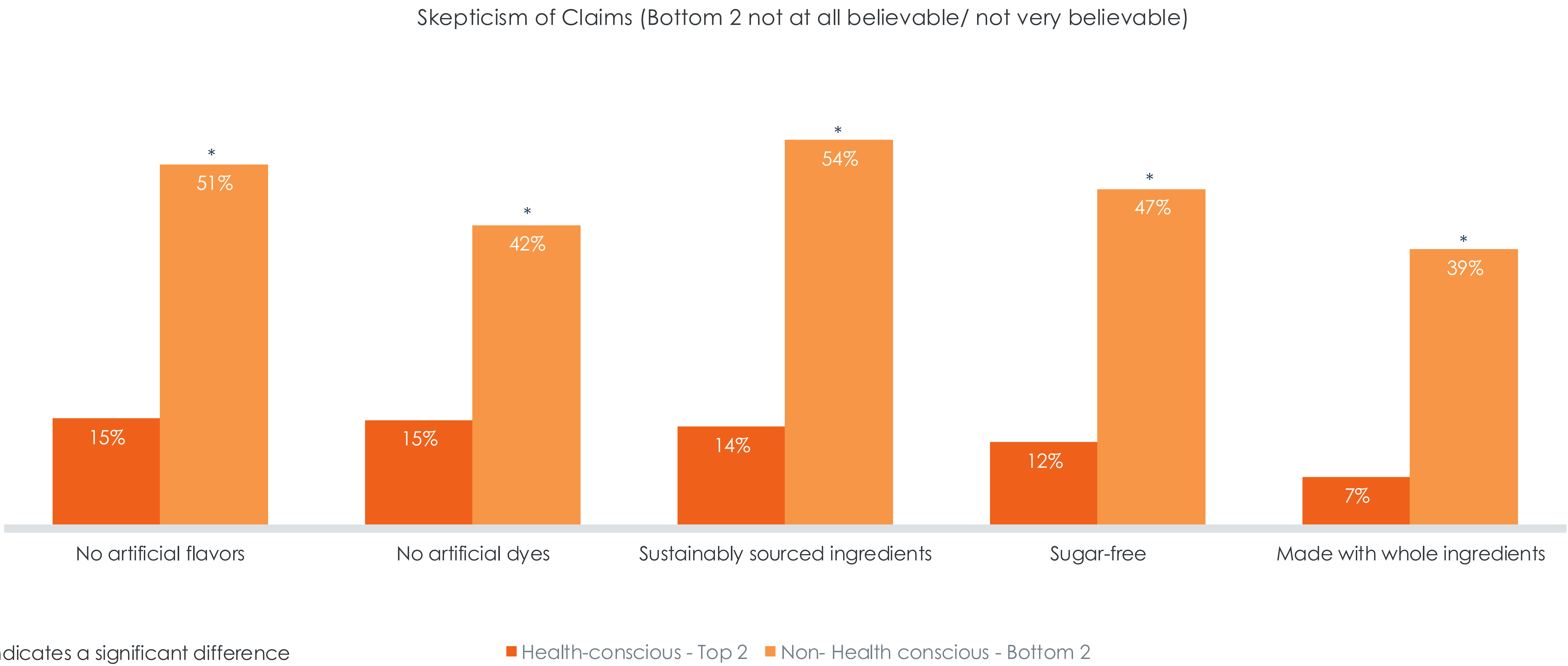


Q. How believable are the following packaged food label claims? (Select one per attribute)

Base: All qualified respondents (N=1,500)

Health Conscious vs. Claims

While health-conscious consumers are more trusting of food label claims than their non-health-conscious counterparts, noticeable skepticism remains, particularly around artificial flavors and dyes. This points to a persistent credibility gap, even among those most inclined to seek out these attributes.



* Indicates a significant difference

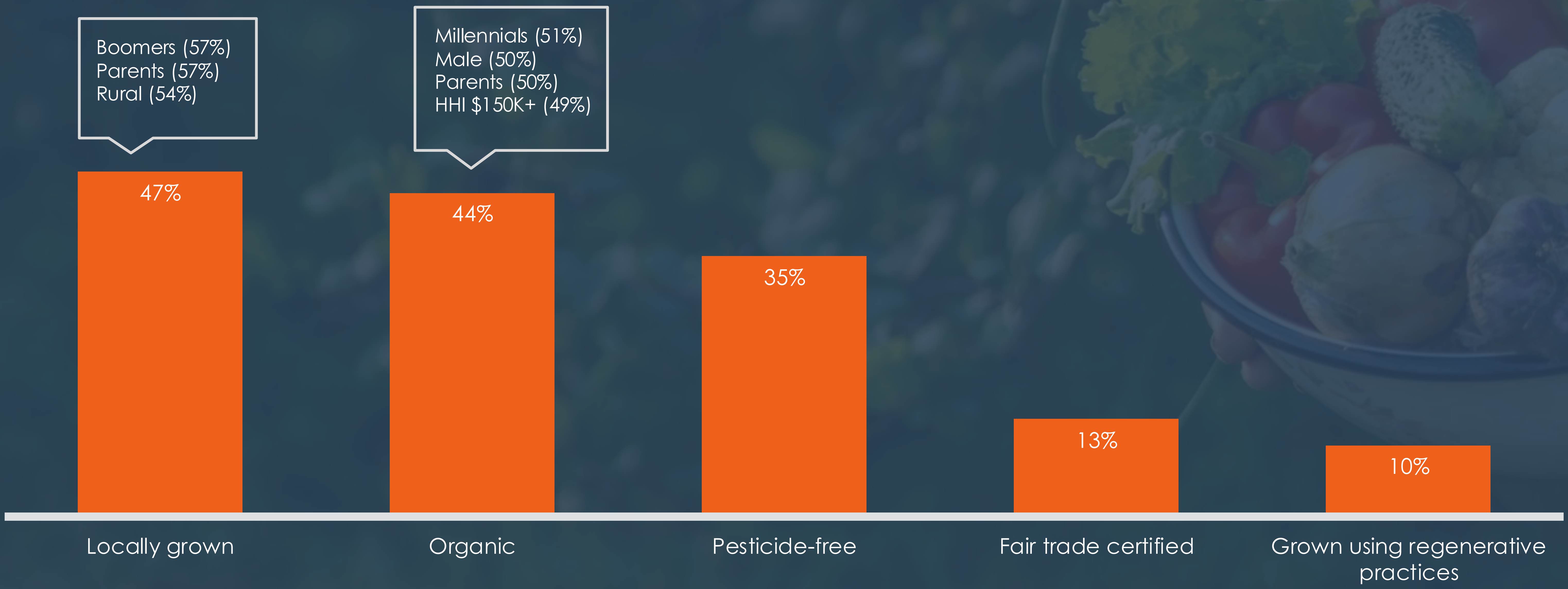
Q. How believable are the following packaged food label claims? (Select one per attribute)

Base: All qualified respondents (N=1,500)

Fresh Produce, Fresh Priorities

Drivers Behind Produce Selection

Nearly half of grocery shoppers say that locally grown produce most influences what they buy, followed closely by organic. Parents are especially selective, placing greater emphasis on both attributes when choosing fresh fruits and vegetables.

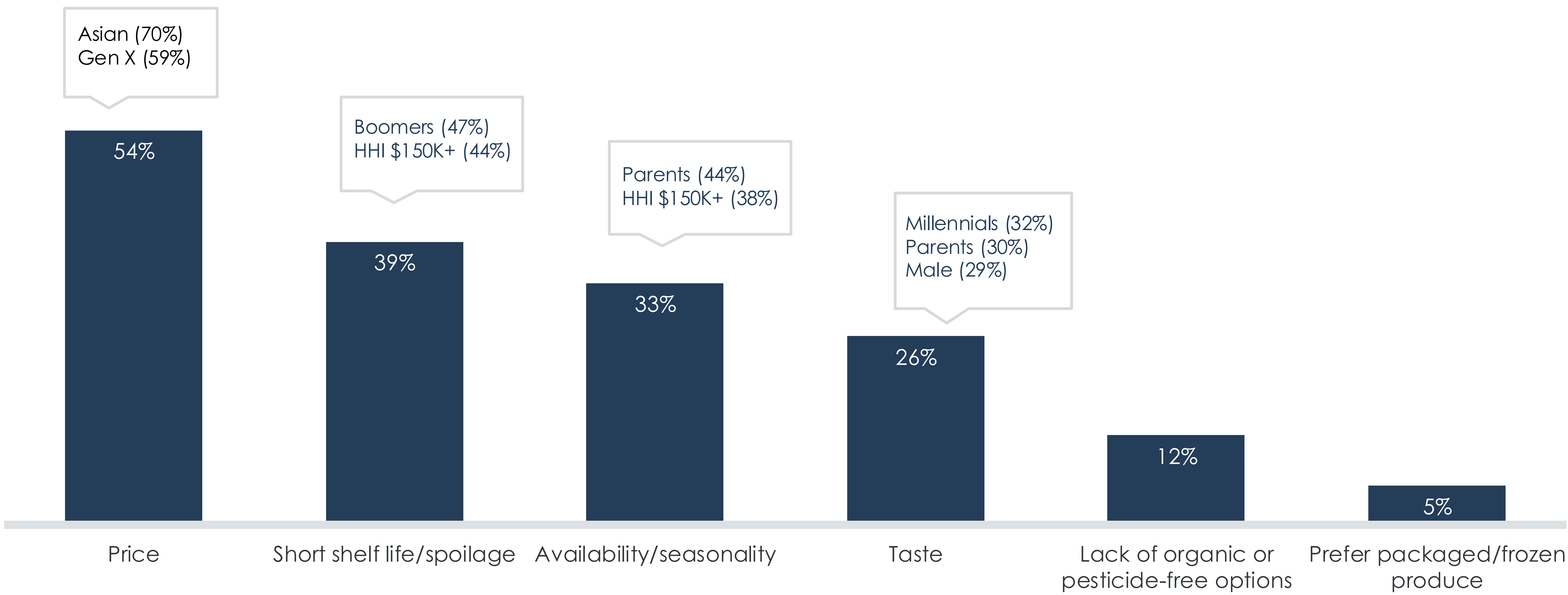


Q. When buying fresh produce, which attributes most influence your purchase decision? (Select up to two)

Base: All qualified respondents (n=1,500)

Detractors Behind Produce Selection

While not surprising, price remains the largest barrier to purchasing fresh produce. However, short shelf life and seasonal availability also prevent many consumers from buying produce. These issues are especially likely to stop high-income shoppers from making a purchase.



Q. Which of these attributes most often limits how much fresh produce you buy? (Select up to two)

Base: All qualified respondents (n=1,500)

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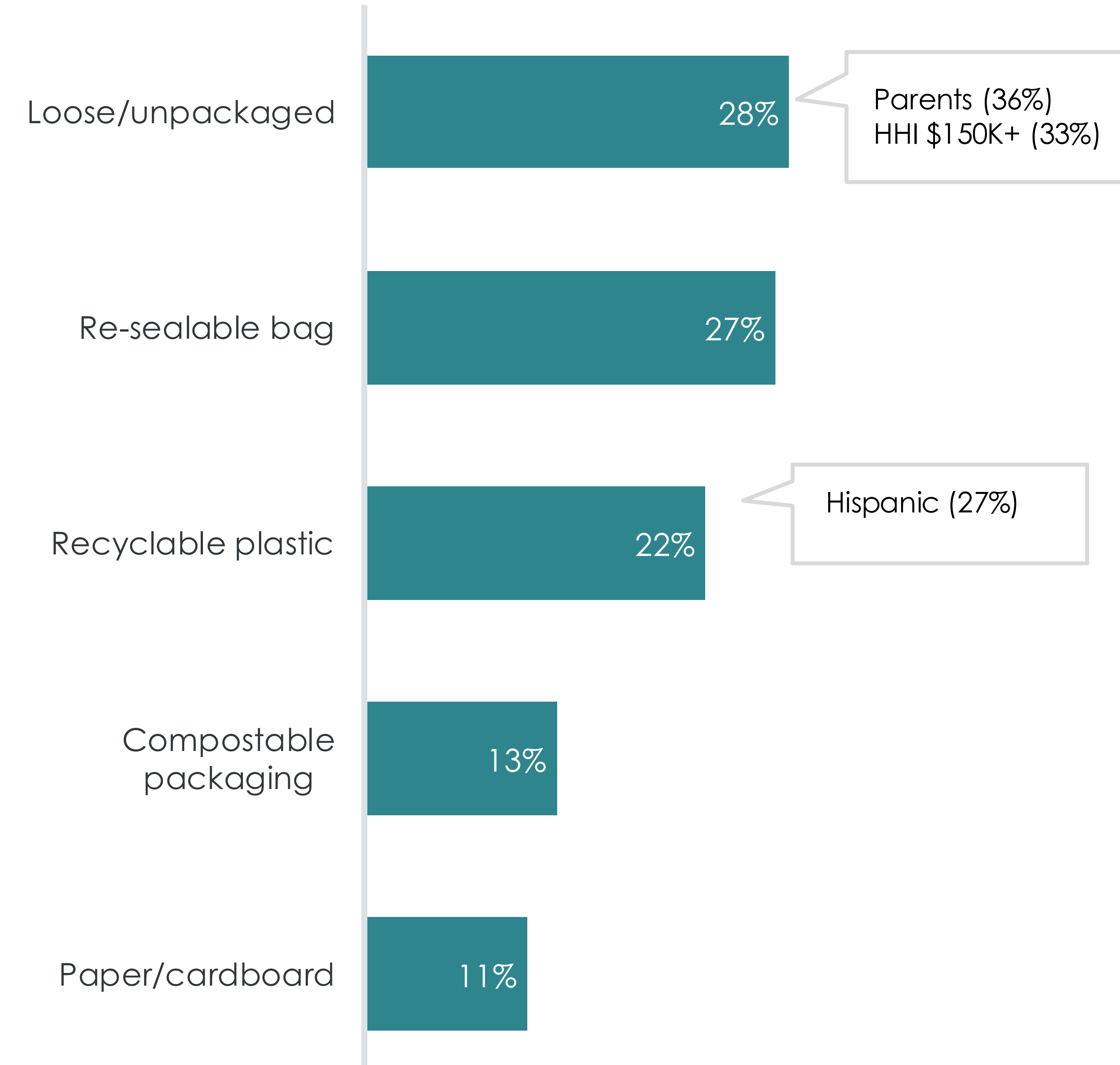
Produce Packaging Preference



Produce Packaging Preference: The Generations

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Gen Z shows a stronger preference for produce packaged in recyclable plastic, whereas older generations like Gen X and Boomers typically opt for loose produce.

	Gen Z	Millennials	Gen X	Baby Boomers
Base Size (n=1500)	231	605	447	217
Loose/unpackaged	16%	20%	**36%**	**41%**
Re-sealable bag	28%	27%	26%	25%
Compostable packaging	13%	**15%**	10%	10%
Recyclable Plastic	**30%**	**24%**	19%	16%
Paper/cardboard	**12%**	**13%**	9%	6%

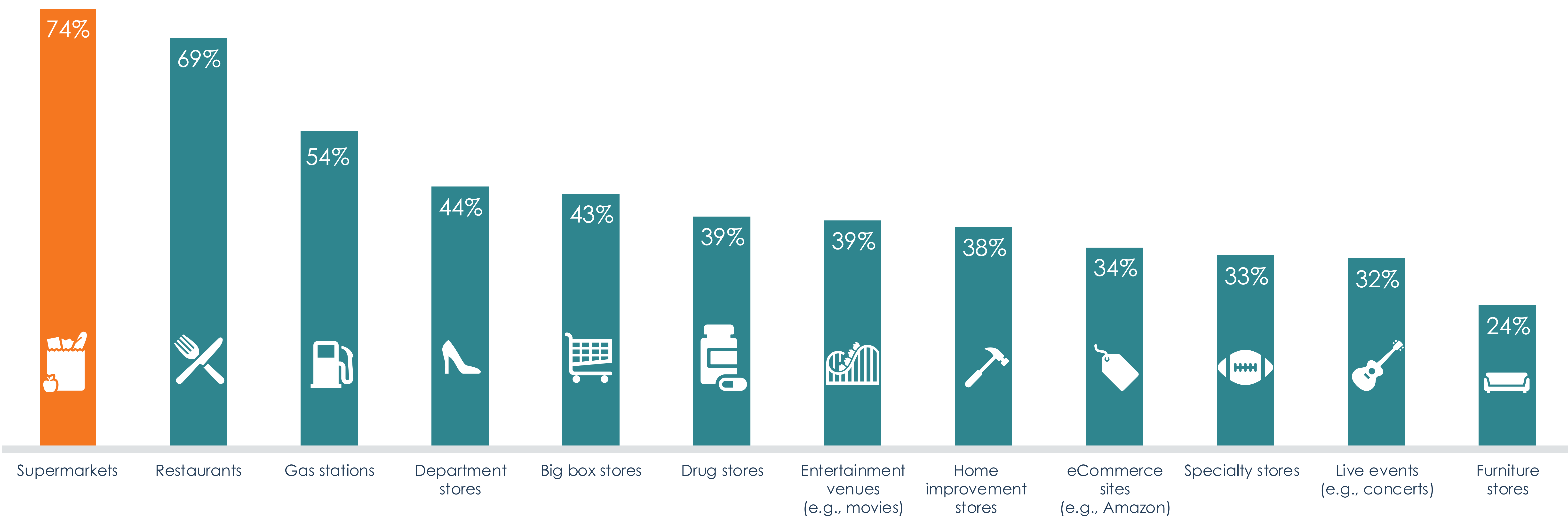
Q. How do you prefer your fresh produce to be packaged? (Select one)

Base: All qualified respondents

The Cost of Filling the Cart

Feeling the Pinch at Checkout

Consumers are more likely to notice rising prices where they buy food, especially at grocery stores and restaurants.



Q. In the last six months, which of the following venues have you noticed price increases? (Select all that apply)

Base: All qualified respondents (N=1,500)

Who's Noticing the Increases

Older Americans, moms, and suburban residents are the most likely to notice rising supermarket prices.

74%

of Shoppers have Noticed a Price Increase at **Supermarkets**

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Who is Significantly More Likely to Notice Increases

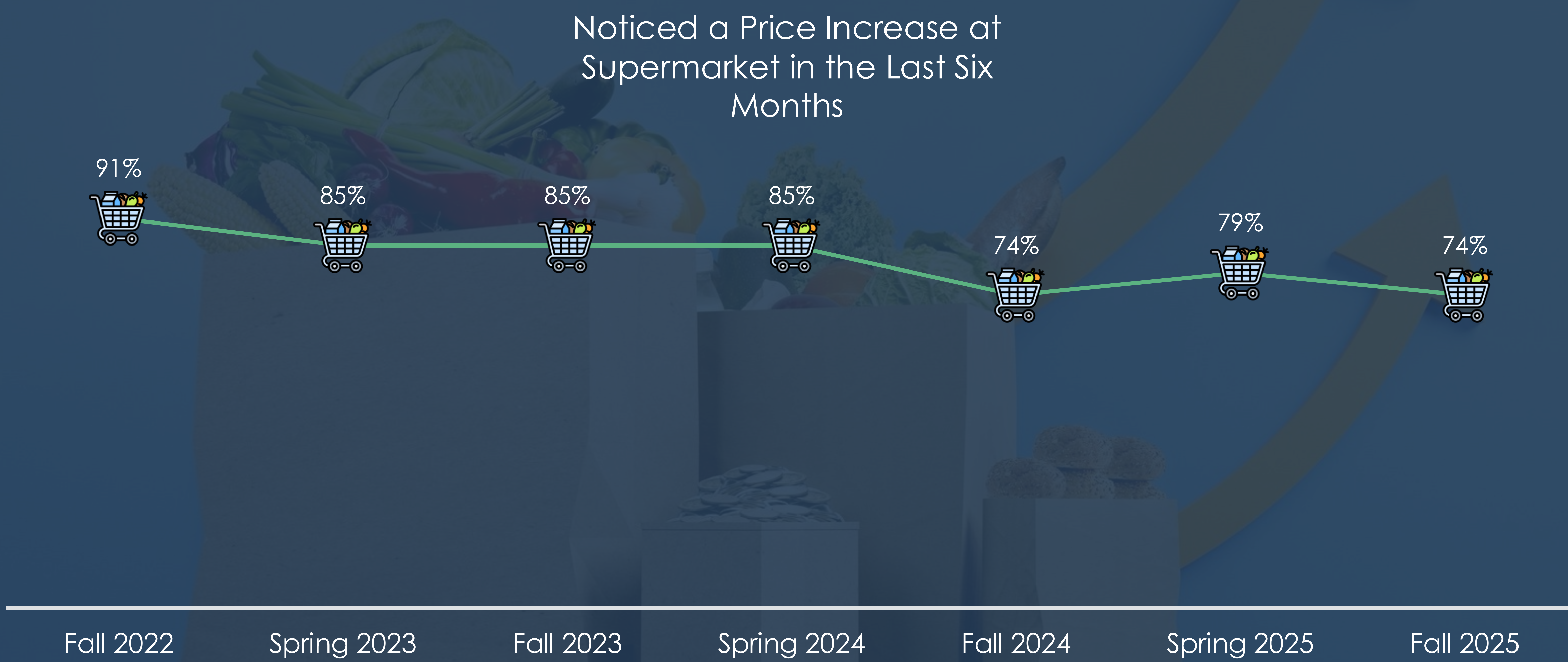
B	86%	Boomers
X	83%	Gen X
	83%	Children in HH
	79%	$150k+
	79%	Suburban

Q. In the last six months, which of the following venues have you noticed price increases? (Select all that apply)

Base: All qualified respondents (N=1,500)

The Grocery Inflation Spike is Slowing

Since Fall 2022, the number of consumers reporting price increases at the supermarket has been gradually declining.



Q. In the last six months, which of the following venues have you noticed price increases? (Select all that apply)

Base: All qualified respondents (N=1,500)

Optimism & the Economy

Consumer Optimism

Three-quarters of Americans feel hopeful about the future, up from the low point in Fall 2022.

Q. How optimistic are you about the future?

Base: All qualified respondents (N=1,500)

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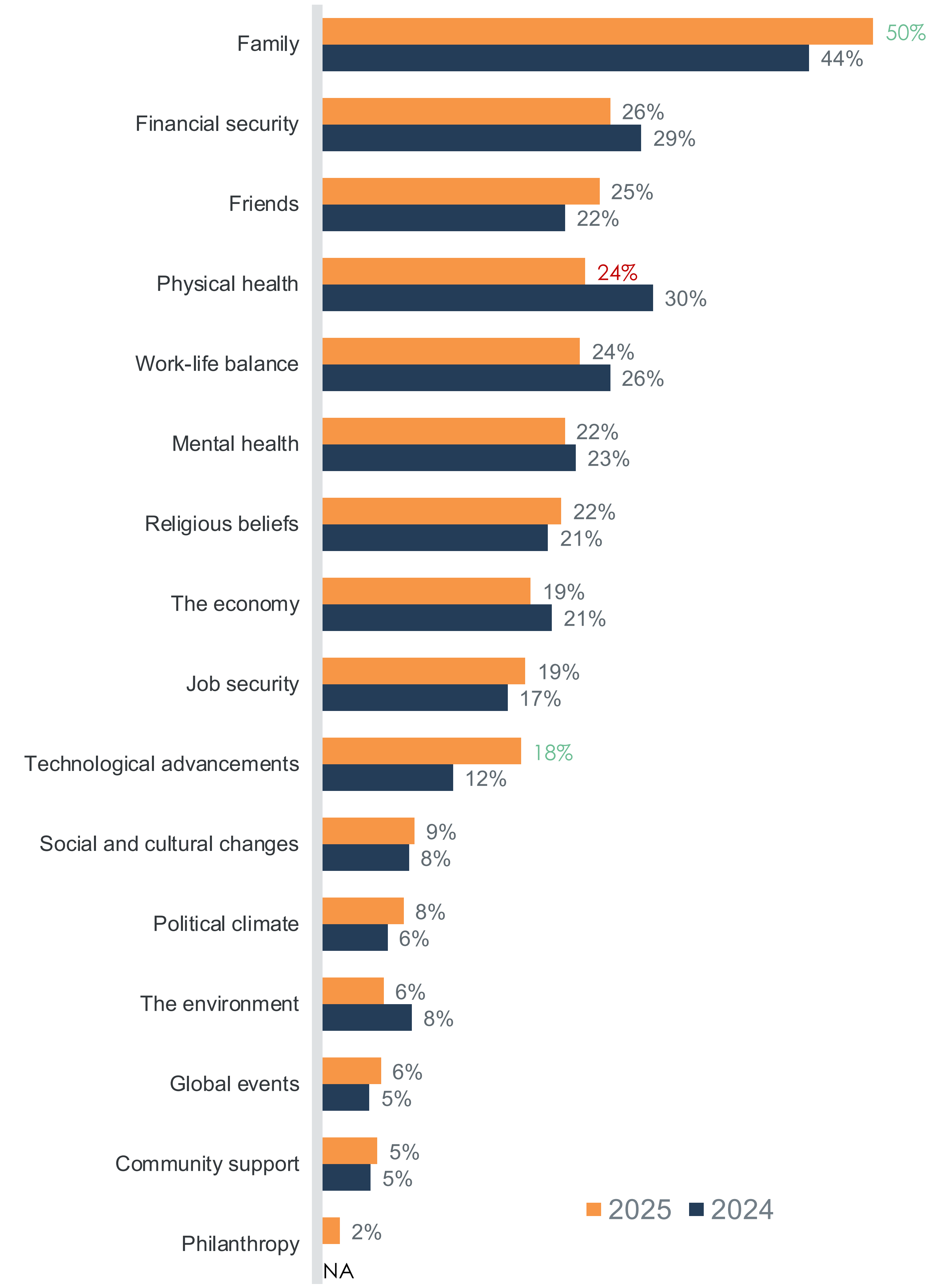
Drivers of Optimism

Family remains the top driver of optimism among Americans. While physical health was the second leading reason in 2024, it has declined significantly. Optimism fueled by technological advancements, however, is on the rise.



Q. Which three factors influence why you are optimistic for the future? (Select up to three)

Base: Optimistic for the future (Fall 2024: n=1,146; Fall 2025: n=1,126)

Each Generation Finds Optimism in Different Places

Gen Z is fueled by work–life balance and mental health. Millennials are energized by balance and the promise of technology. Gen X leans most on family as their source of optimism. Baby Boomers turn to financial security, good health, and faith to stay positive about the future.

	Gen Z	Millennials	Gen X	Baby Boomers
Base Size	190	477	310	149
Family	46%	47%	56%	51%
Financial security	21%	24%	30%	34%
Friends	34%	22%	25%	26%
Physical health	18%	25%	25%	28%
Work-life balance	26%	25%	24%	14%
Mental health	26%	24%	18%	21%
Religious beliefs	16%	19%	25%	32%
Technology	13%	23%	17%	11%

Q. Which three factors influence why you are optimistic for the future? (Select up to three)

Base: Optimistic for the future (N=1,126)

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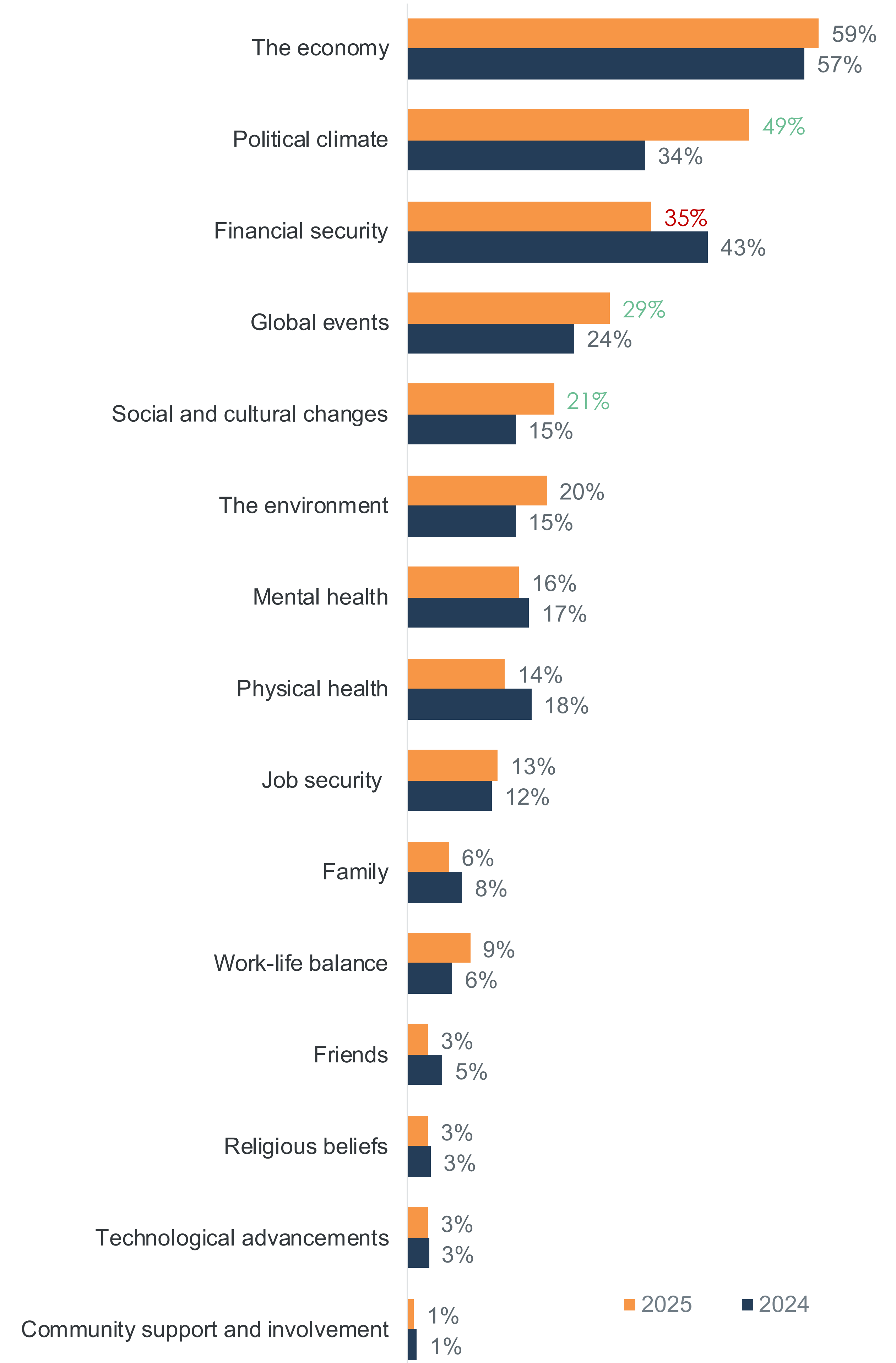
Detractors of Optimism

The economy remains the top reason for a negative outlook, but concerns about personal financial security are easing. In contrast, worry over the political climate, global events, and social and cultural issues is growing as key drivers of pessimism.



Generational Drivers of Pessimism Vary

For Gen Z, struggles with mental health, work–life balance, and family pressures fuel a negative outlook. Gen X points to frustration with the economy and political climate. Baby Boomers focus on financial security as a concern.

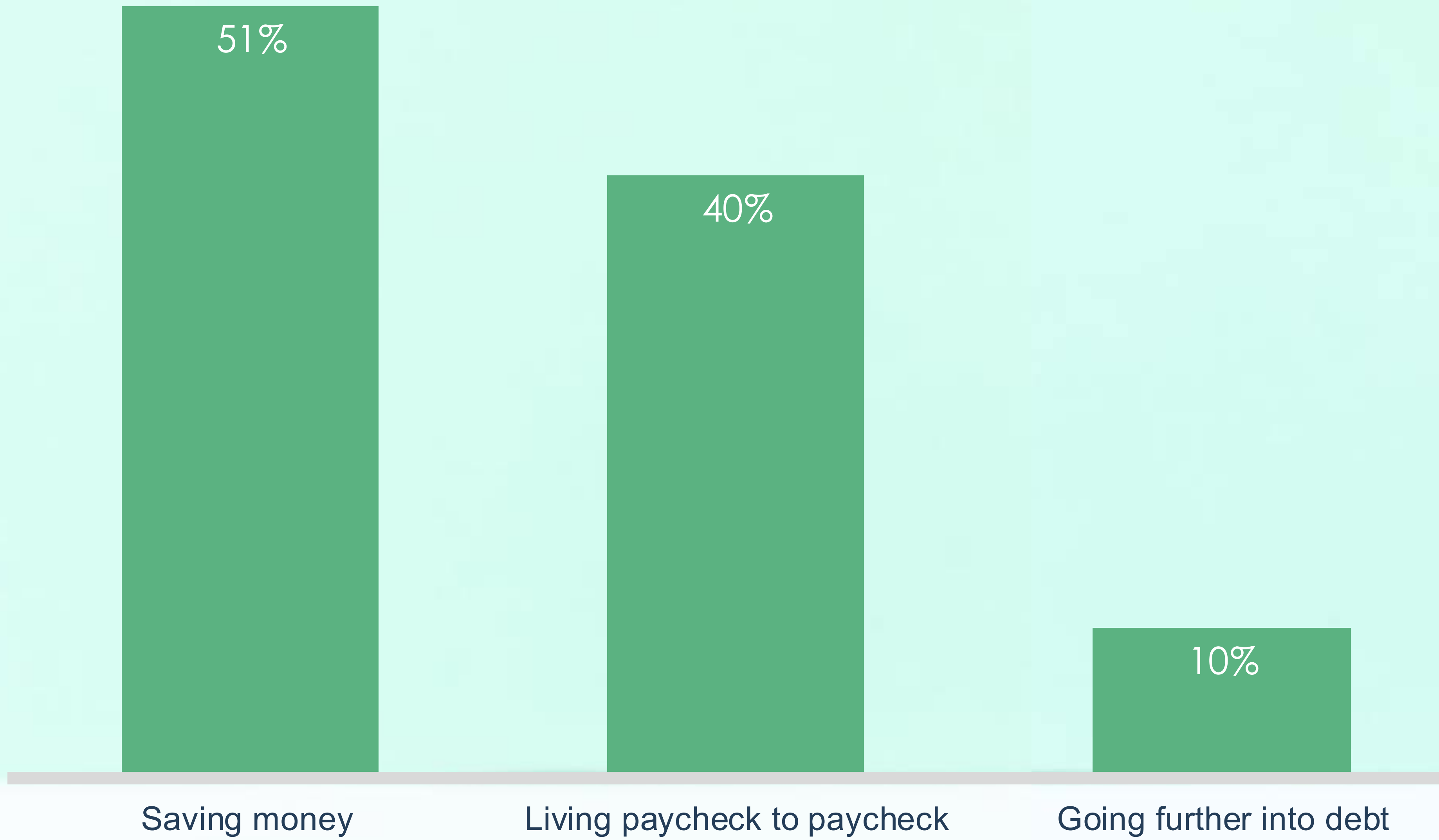
	Gen Z	Millennials	Gen X	Baby Boomers
Base Size	41	128	137	68
The economy	56%	58%	61%	56%
Political climate	29%	41%	61%	54%
Financial security	39%	38%	29%	40%
Social and cultural changes	17%	16%	25%	28%
Mental health	27%	20%	15%	6%
Work-life balance	20%	9%	8%	6%
Family	20%	6%	2%	4%

Q. Which three factors influence why you are not optimistic for the future? (Select up to three)

Base: Not optimistic for the future (N=374)

Financial Positions

Only half of the US population is saving money.



Q. Which of the following best describes your current financial situation?

Base: All qualified respondents (N=1,500)

How People Learn about Brands by Generation

	Total	Gen Z	Millennials	Gen X	Boomers
Social media	32%	44%	38%	27%	18%
Search	25%	19%	25%	26%	31%
Television	24%	14%	17%	32%	36%
Word of mouth	23%	17%	21%	24%	29%
In-store	18%	14%	13%	23%	24%
Online reviews	13%	13%	15%	11%	11%
Short-form video (e g , TikTok)	11%	26%	14%	5%	1%
Streaming video	9%	11%	11%	8%	5%
Influencers	7%	12%	9%	4%	1%
News or magazine	6%	3%	4%	7%	10%
Radio	4%	3%	4%	4%	6%
Podcasts	4%	3%	5%	4%	3%
Emails/ newsletters	4%	4%	4%	3%	4%

Q. In the last six months, which of the following venues have you noticed price increases?

Base: All qualified respondents (N=1,500)

Media Trustworthiness Index

Above Average

Word of mouth (friends/family)	15%
Online search	12%
Online reviews or forums	8%
Television	5%
Social media	2%
News or magazine articles	1%
In-store displays/retail promotions	-1%
Short-form video (e g , TikTok)	-6%
Streaming video (e g , Netflix)	-7%
Podcasts	-7%
Radio	-7%
Influencers/creators online	-8%
Emails/ newsletters	-8%

Below Average

Respondent Profile

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Gender

50% Female

50% Male

Generation

43 years old
Median Age

Z **15%** Gen Z

X **30%** Gen X

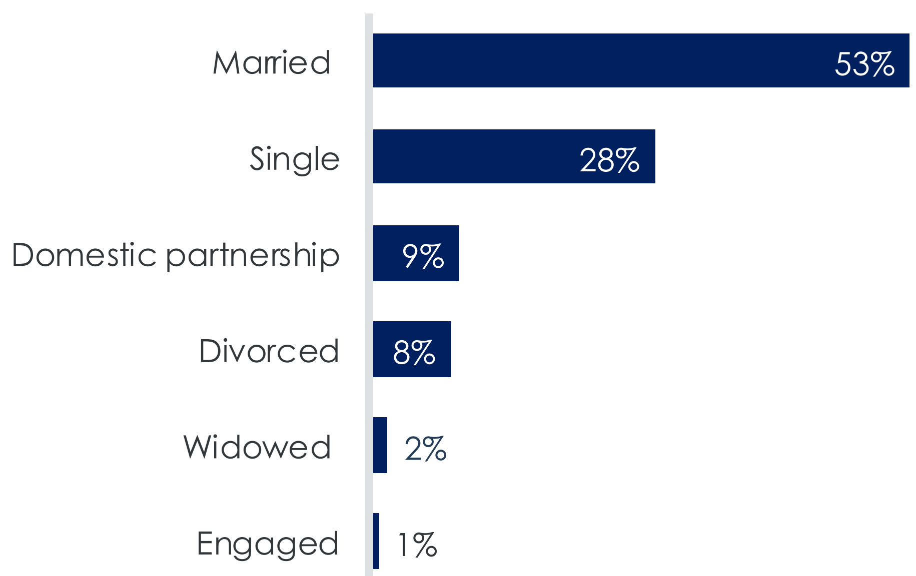
M **40%** Millennials

B **14%** Baby Boomers

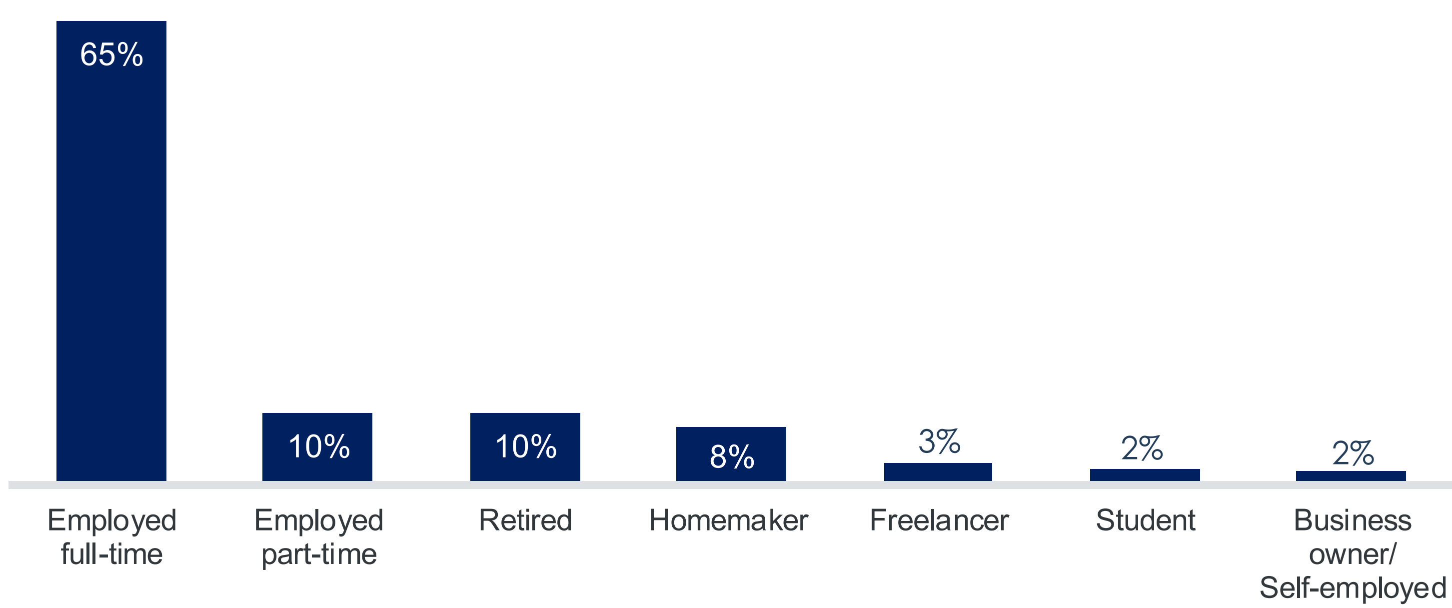
Children Under the Age of 18

45%
Have children

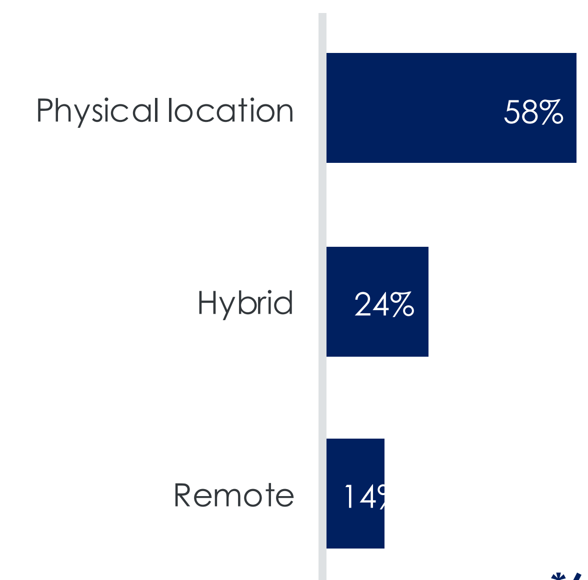
Civil Status



Employment Status



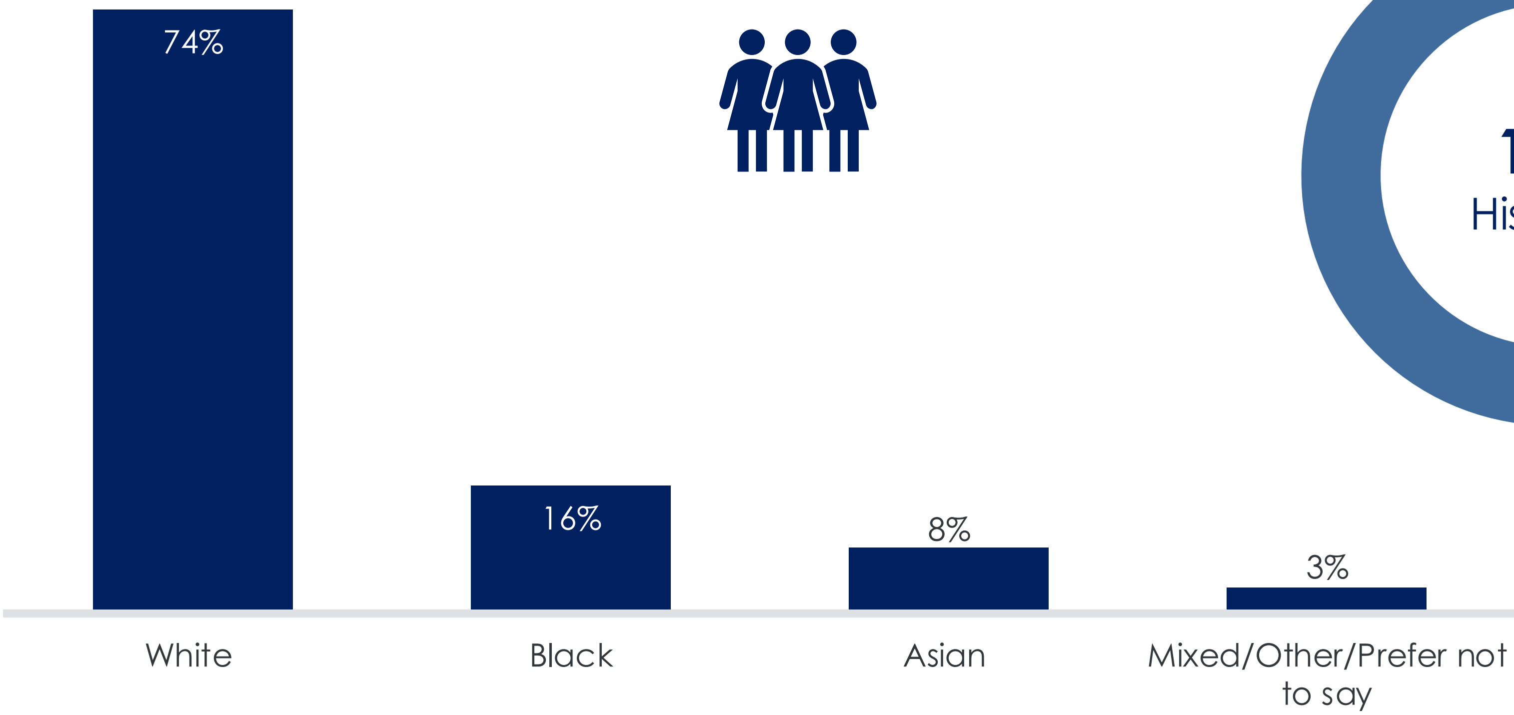
Work Location

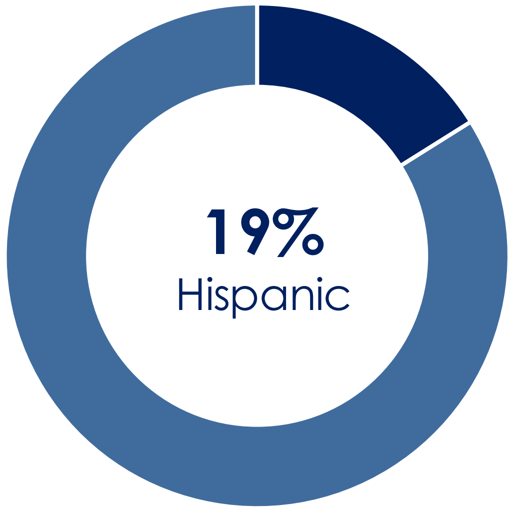


***6%** Other

Respondent Profile

Ethnicity





Political Party

34% Democrat

24% Independent

35% Republican

***6%** Prefer not to say/Other

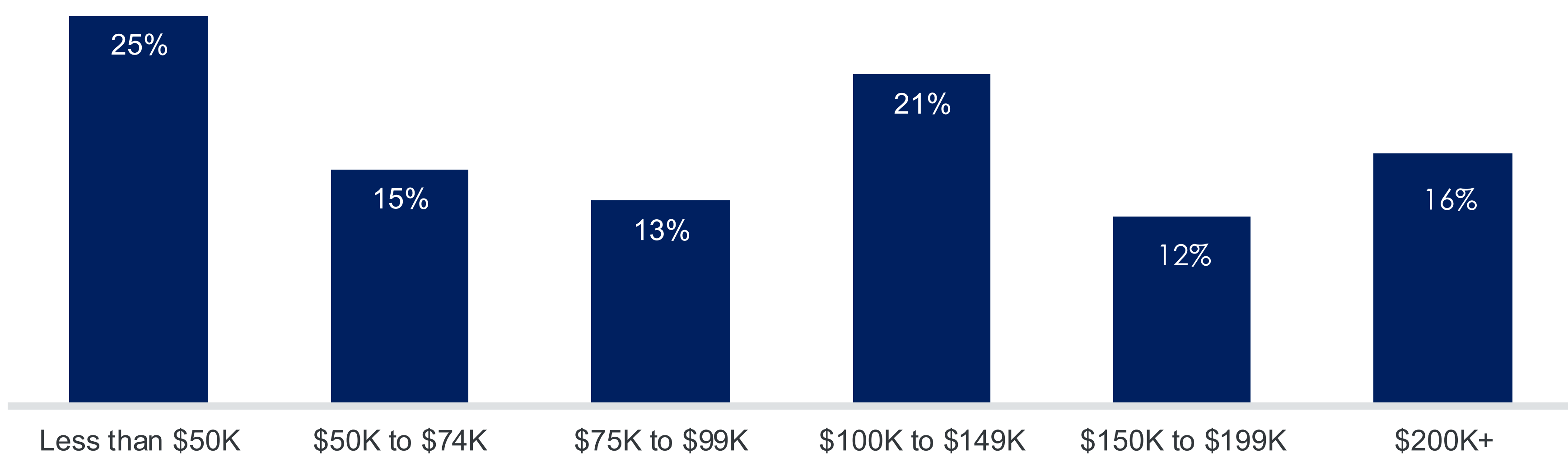
Area

23% Rural

46% Suburban

31% Urban

Household Income



About Provoke Insights

Provoke Insights is not just a market research firm. We are a strategic partner dedicated to fueling brand growth. Our full-service approach goes beyond data collection and delivers powerful insights that brands can act on immediately.

What sets us apart? We live and breathe branding and advertising research. Our team combines cutting-edge methodologies with real-world marketing expertise. From seasoned researchers to brand strategists to media experts, we make sure every finding turns into an impactful business strategy.

At Provoke Insights, reports are never the final product. We deliver a clear roadmap to success. Whether your goal is to sharpen messaging, refine your audience, or maximize ROI, our research is built to generate measurable results.

Let’s turn insights into action. Reach out to us at info@provokeinsights.com to learn more.