



Grocery Trends:
The Loyalty Breakdown
Consumer Trends Research Report

Summer 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 and specialties.

Now in its twelfth wave, this nationally representative study reveals what drives their decisions.

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 habits, evolving consumer priorities, and the role loyalty plays in the purchase decisions.



Methodology

Provoke Insights conducted a 15-minute online survey among 1,500 Americans aged 21 to 65 in March 2026.

To ensure a representative sample of the U.S. population, Census data was used to inform a stratified random 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 $\pm 2.5\%$ 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

The New Rules of Grocery Loyalty

Grocery loyalty remains remarkably strong, with 96% of Americans having a primary grocery store they regularly shop at and only 4% saying they do not have a main store. Consumers are drawn to their main retailer because of convenience, pricing, fresh produce, and overall quality, yet many still strategically shop multiple retailers to maximize savings and secure the best value. Loyalty is especially strong in staple categories like dairy, beverages, coffee and tea, cheese, and frozen foods, where consumers consistently gravitate toward brands they trust for taste, quality, and reliability. Frequent grocery shoppers show a deeper emotional connection to the shopping experience, with many enjoying in-store browsing and remaining loyal to preferred brands even at a premium. Millennials, parents, and Hispanic consumers stand out as highly engaged grocery shoppers, driving stronger omnichannel adoption and more active engagement across the category.



From Commodity to Cult Brand

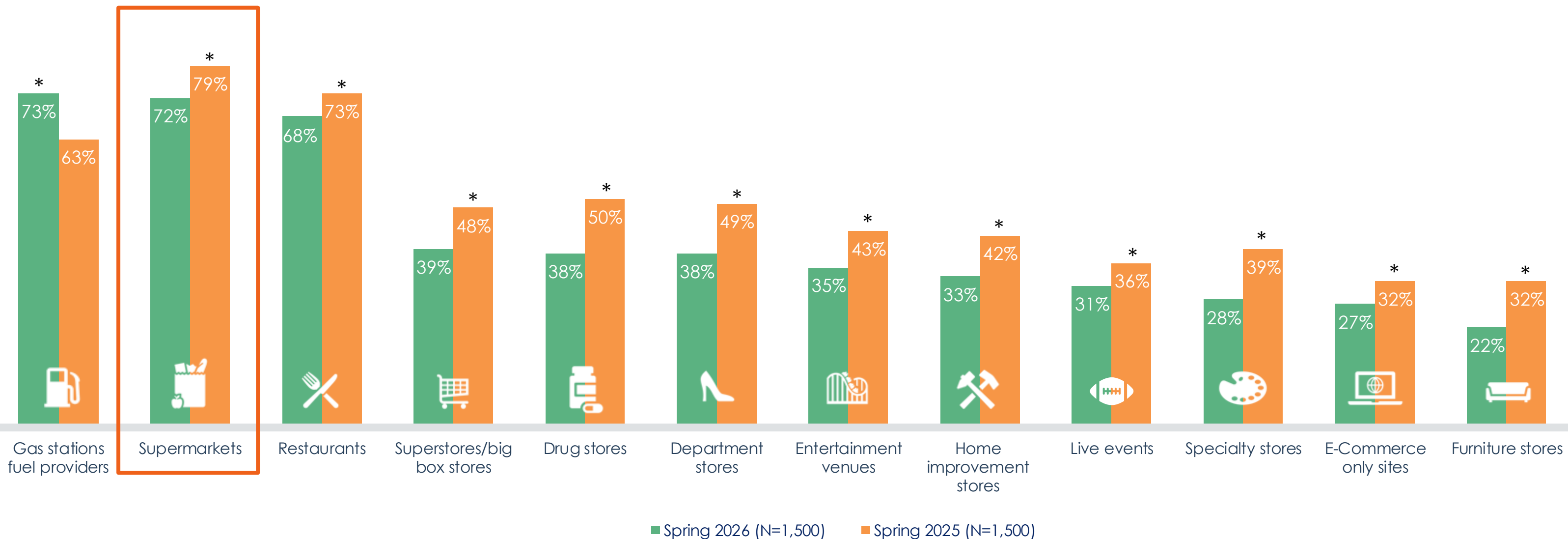
Produce branding represents one of the biggest untapped opportunities in grocery, as consumers who notice produce brands strongly associate them with superior quality, freshness, taste, and trust. A quarter of Americans consistently purchase the same produce brands, while fresh produce itself remains a key driver of grocery store loyalty and store selection. Millennials, Gen Z, parents, urban residents, and Hispanic shoppers are significantly more engaged with produce branding, signaling growing demand for more premium and differentiated produce experiences. Frequent grocery shoppers are especially likely to connect produce brands with better taste and overall quality, reinforcing the idea that produce branding can elevate perception in what has traditionally been viewed as a commodity category. While legacy brands like Dole still dominate awareness, growing recognition for brands like Driscoll's suggests consumers are increasingly open to produce brands that create stronger emotional and quality-driven connections.

Detailed Findings

Price Sensitivity & Grocery Attitudes

Supermarkets Remains a Leader in Price Hikes

Supermarkets remain one of the most noticed categories for price increases. However, compared to last year, the number of Americans noticing higher prices has decreased. Gas station prices have overtaken supermarkets as the number one place where price increases are seen.



*Indicates significant differences

Noticed Supermarket Price Increases

Nearly three-quarters of Americans have noticed price increases at supermarkets. Older consumers, particularly Baby Boomers and Gen X, are significantly more likely to notice these increases compared to other groups.

Who is Significantly More Likely to Notice Increases



Baby Boomers

86%



Gen X

84%



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78%

Grocery Price Trends

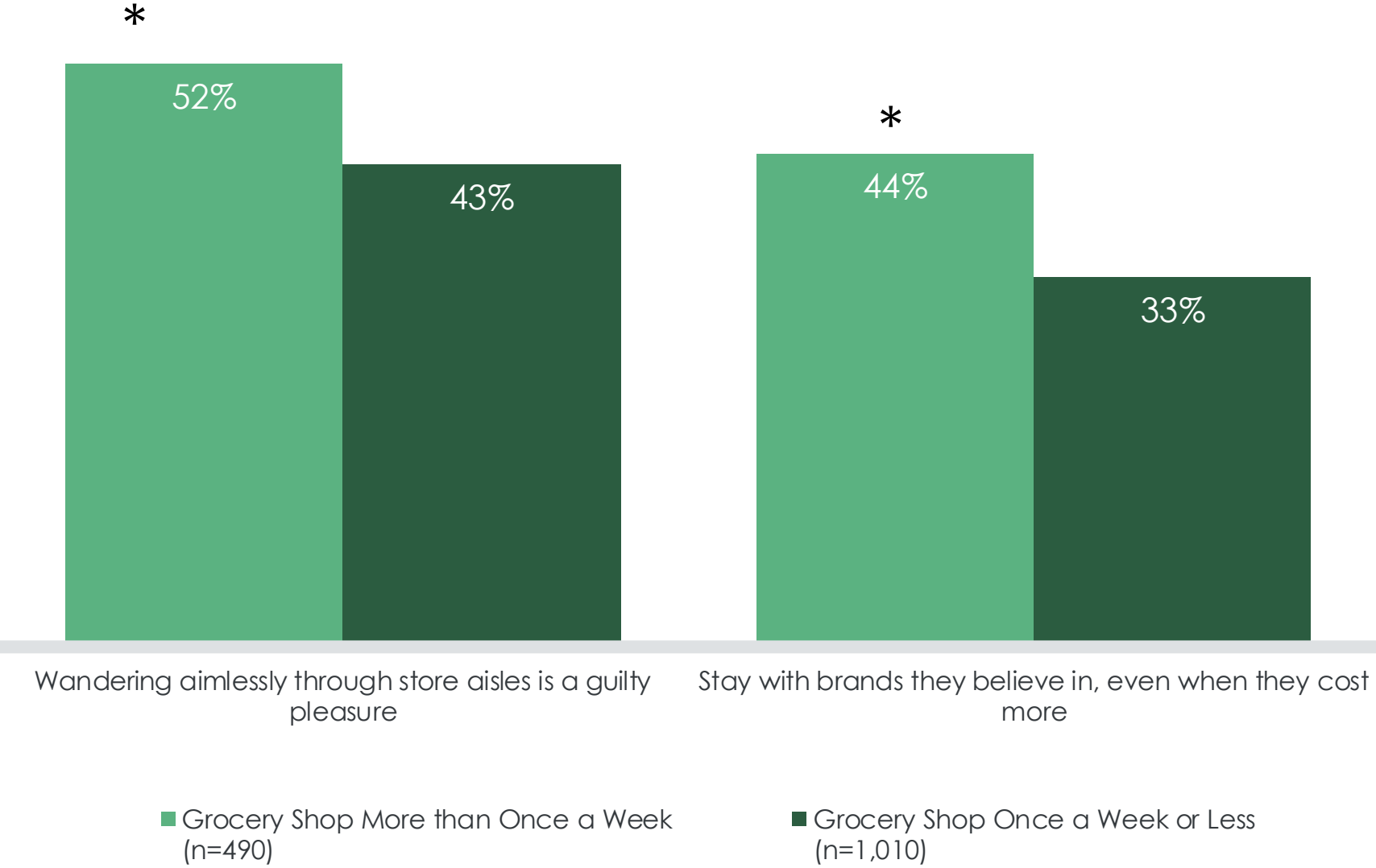
Consumer perception of grocery price increases has steadily declined since Fall 2022, though a strong majority still report noticing higher supermarket prices.



Grocery Purchasers Shopping Attitudes

Frequent grocery shoppers are more engaged with the shopping experience, showing stronger loyalty to trusted brands and greater enjoyment of in-store browsing.

Top 3 on a 7-Point Agree Scale



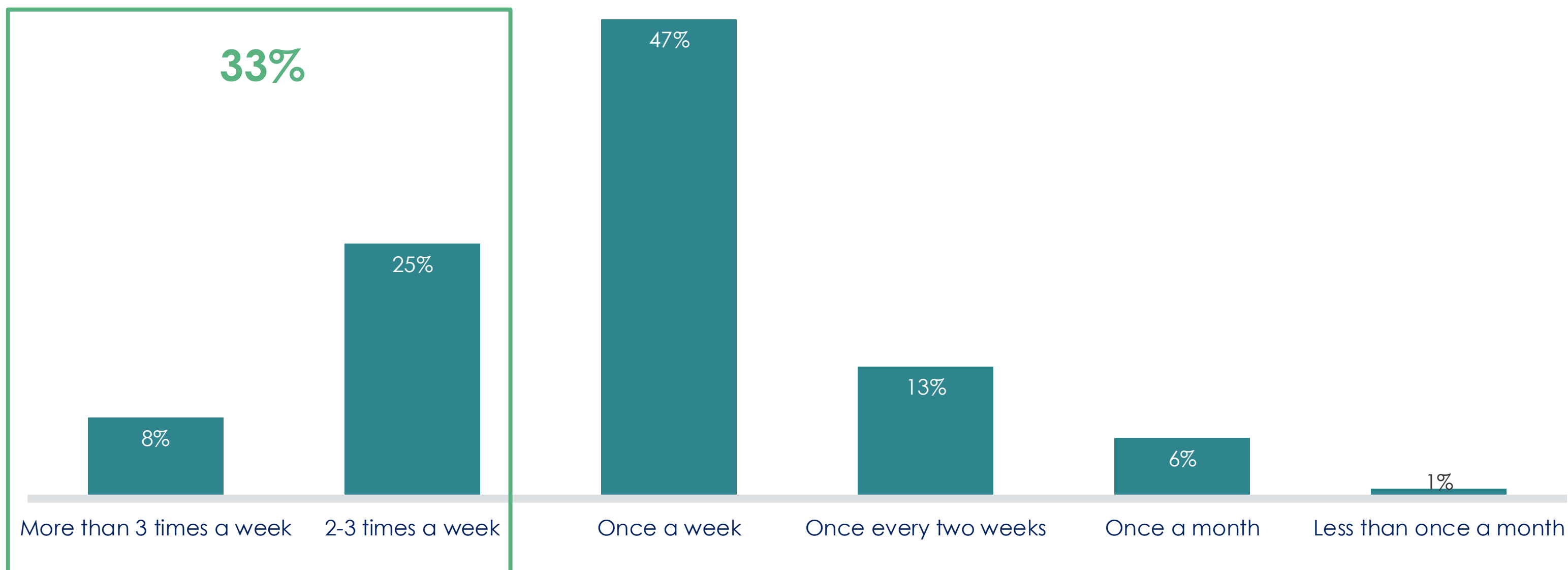
*indicates significant differences

A photograph of a male cashier with glasses and a beard, wearing a blue apron over a teal shirt, working at a grocery store checkout. He is focused on his task, with his hands near a container on the counter. The counter is cluttered with various items, including a bag of bread, a carton of eggs, and some containers. In the background, there are shelves stocked with various grocery items and a large window. A computer monitor and a payment terminal are visible on the counter to the right.

Frequency of Shopping

Frequency of Shopping

Grocery shopping remains a frequent routine for most Americans, with nearly half shopping once a week and one-third shopping multiple times per week.



*1% stated never

Who's Grocery Shopping More or Less Often

Millennials, parents, and Hispanics are the most likely groups to grocery shop multiple times per week. In contrast, Gen Z and Baby Boomers are more likely to shop once a week or less, reflecting less frequent grocery trips overall.

More than Once a Week

n=490

33%



Millennials

40%



Parents

39%



Hispanics

38%



Once a Week or Less

n=1010

67%



Gen Z

75%

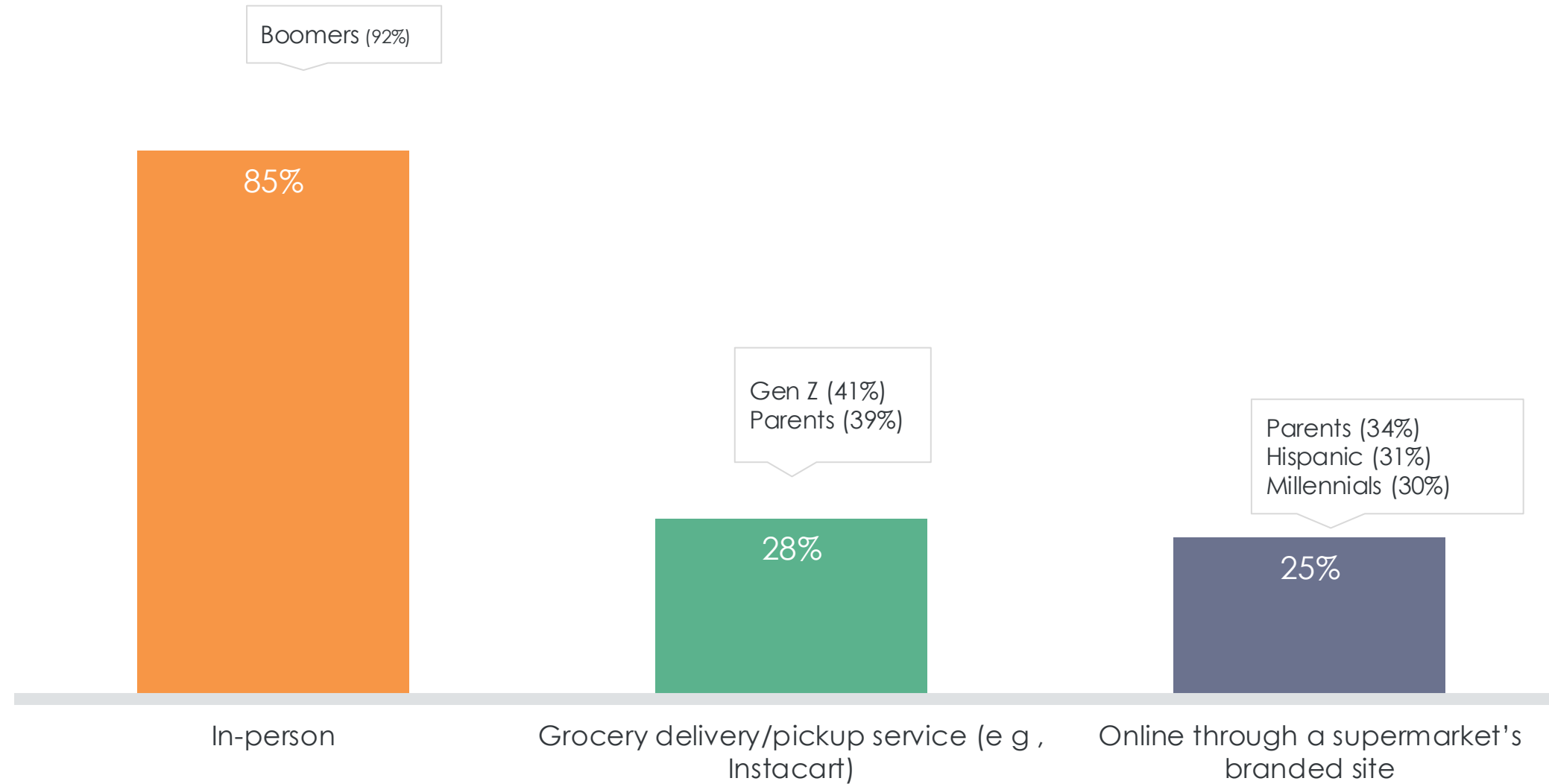


Baby Boomers

74%

How Americans Typically Shop

In-person grocery shopping overwhelmingly remains the dominant shopping method among Americans, especially among Baby Boomers. However, younger consumers, parents, and Hispanics are more likely to use grocery delivery, pickup, and supermarket-branded online shopping options.



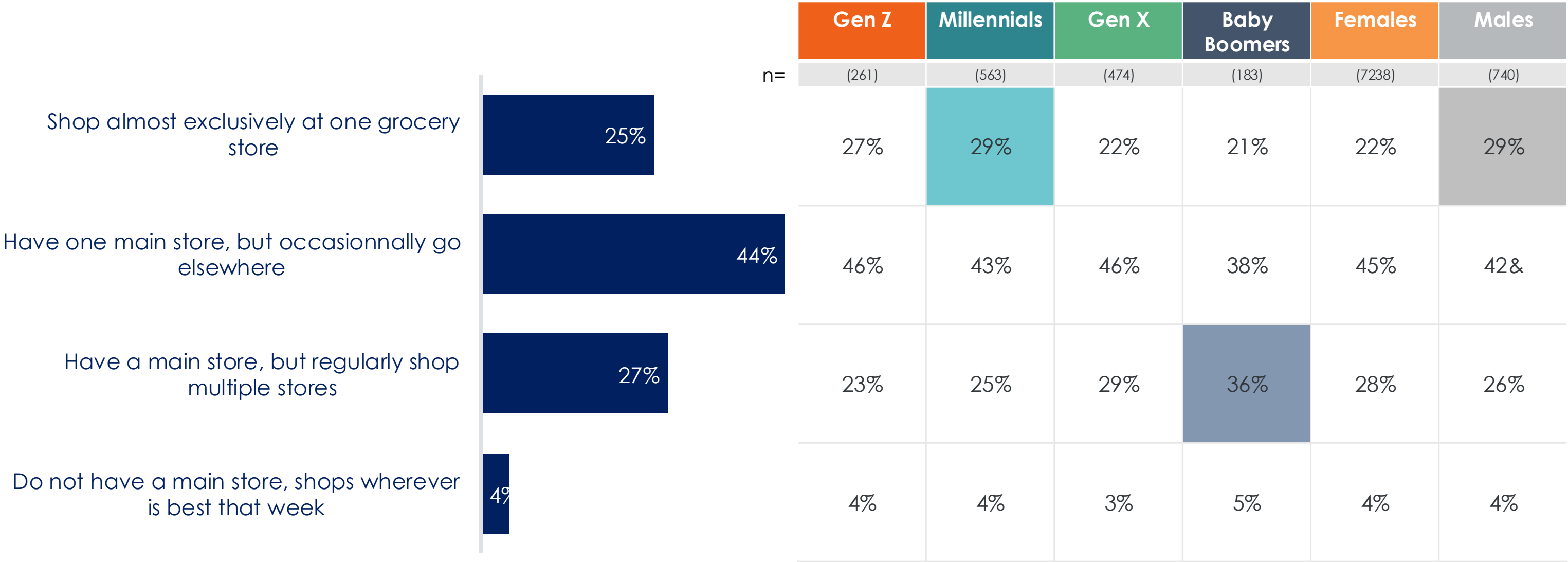
Where People are Shopping In-Store

Supermarkets remain the primary destination for in-store grocery shopping by a wide margin, especially among Baby Boomers and higher-income households. Parents and younger shoppers are more likely to diversify their shopping across big-box retailers, discount grocers, specialty food stores, and local farmer's markets.



How Americans Shop for Groceries

Most Americans have a primary grocery store but still shop elsewhere occasionally, highlighting a balance between loyalty and flexibility. Baby Boomers are the most likely to regularly shop across multiple stores, while Millennials and men are the most likely to stay loyal to a single primary grocer.



A photograph of a grocery store checkout area. A customer, a woman wearing a dark grey cardigan over a white t-shirt and blue jeans, is holding a grey plastic shopping basket. A cashier, wearing a light green t-shirt and a dark grey vest, is also holding the basket. The basket is filled with fresh produce, including yellow bananas, red tomatoes, green broccoli, and a yellow lemon. The background is slightly blurred, showing shelves and other parts of the store.

Brand Loyalty in Grocery Purchase

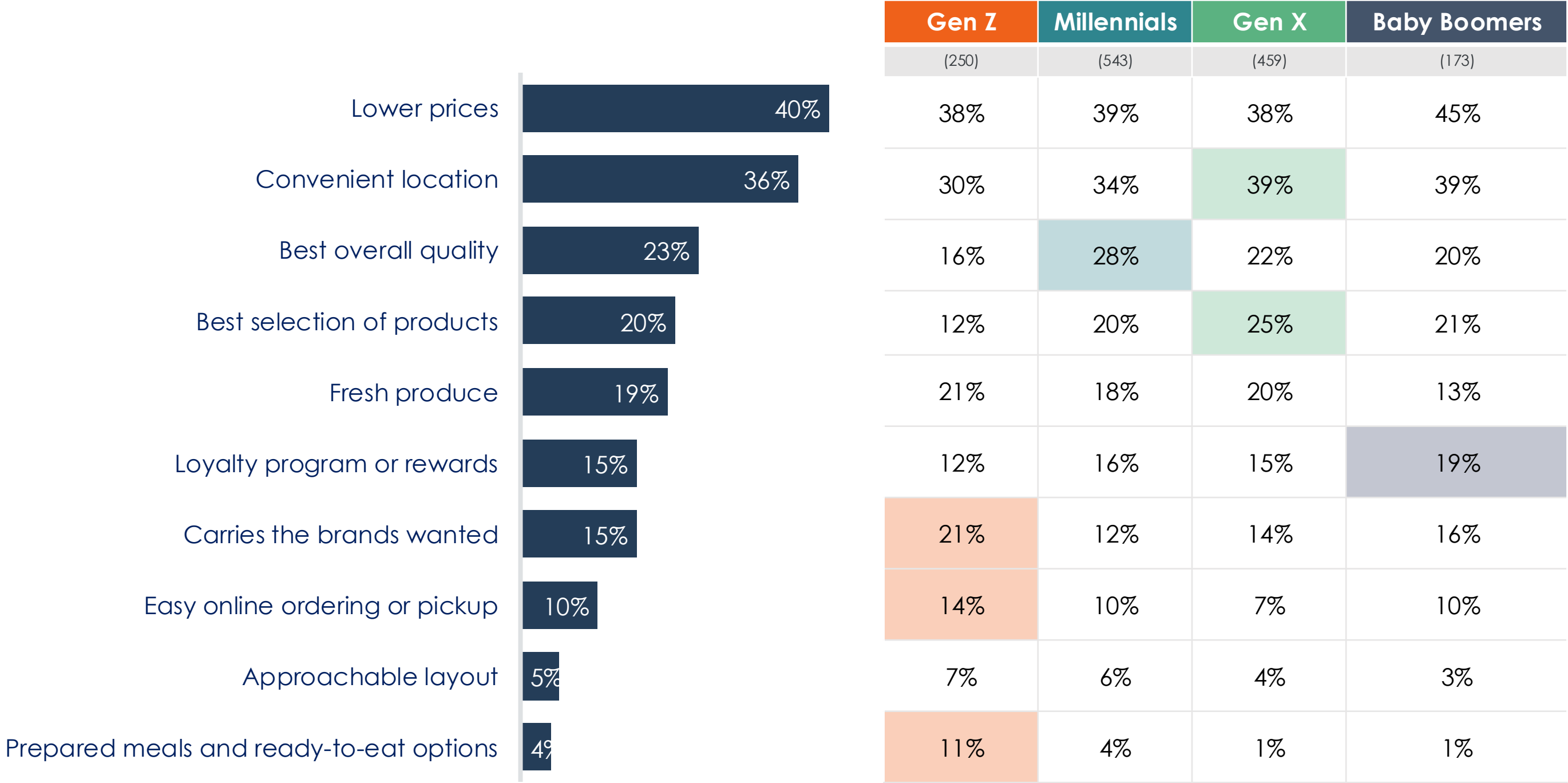
Reasons for Having a Main Grocery Store

Nearly all Americans have a primary grocery store, with lower prices and convenient location serving as the top drivers of store choice. Quality, product selection, and fresh produce also play an important role, while digital conveniences and loyalty programs are secondary considerations.



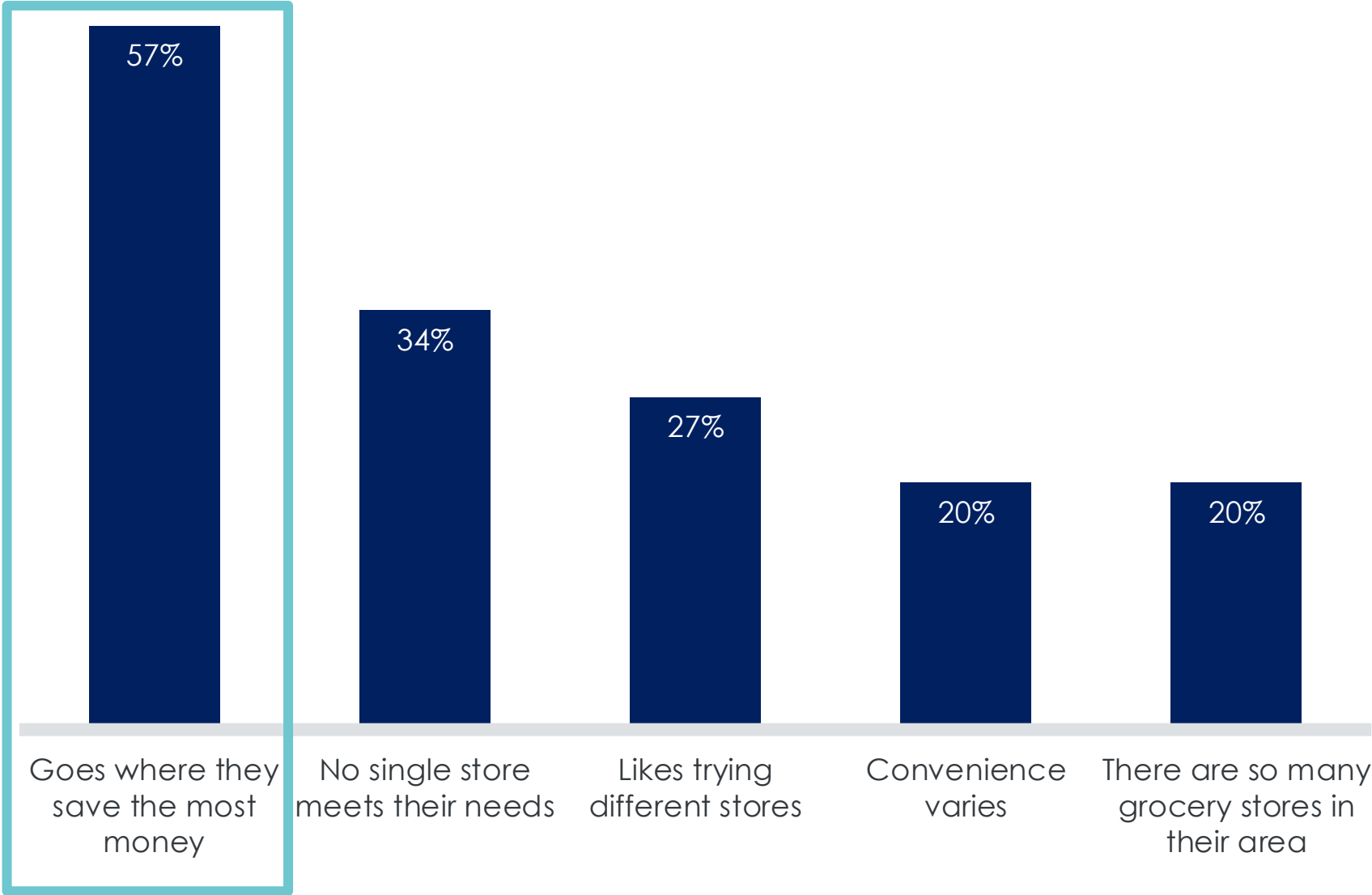
Reasons For Having a Main Grocery Store

Motivations vary meaningfully by generation. Boomers over-index on loyalty programs, Gen X places greater emphasis on convenience and product selection, Millennials are more driven by overall quality, while Gen Z is more likely to prioritize specific brands, online ordering, and prepared meal options.



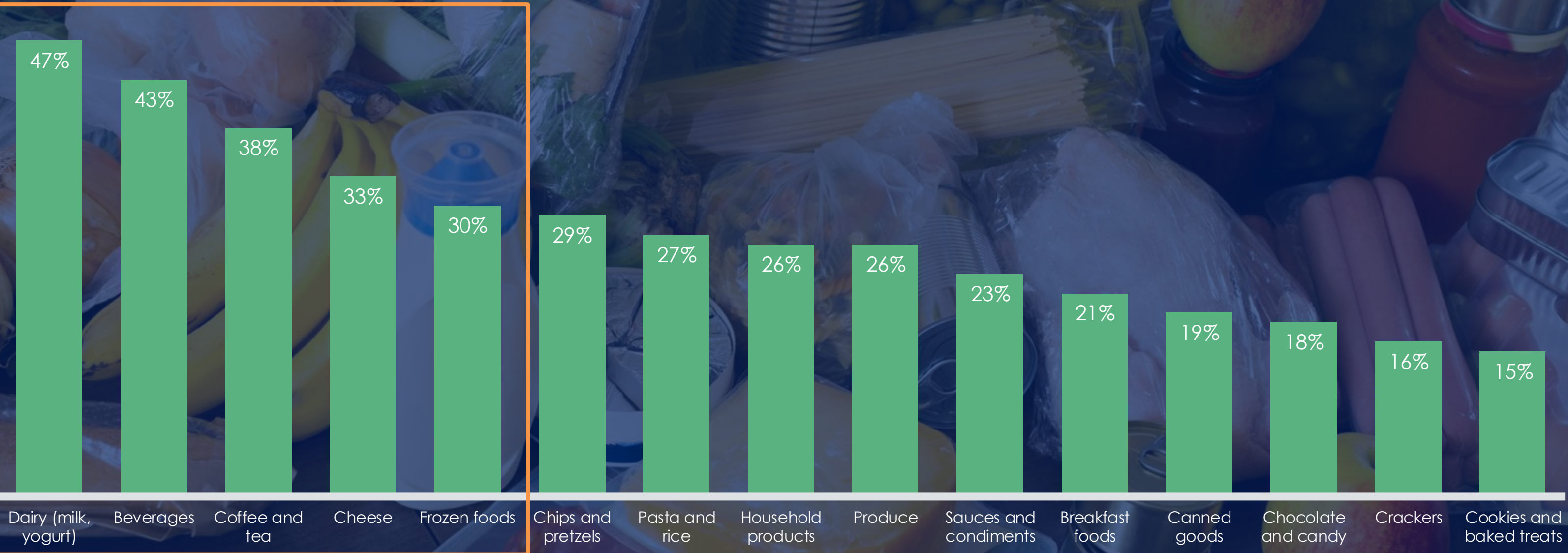
Reasons for **NOT** Having a Main Grocery Store

Among shoppers without a primary grocery store, saving money is the dominant motivator, with consumers choosing stores based on the best deals available. Many also feel that no single store fully meets their needs, leading them to shop across multiple retailers.



Category Brand Loyalty

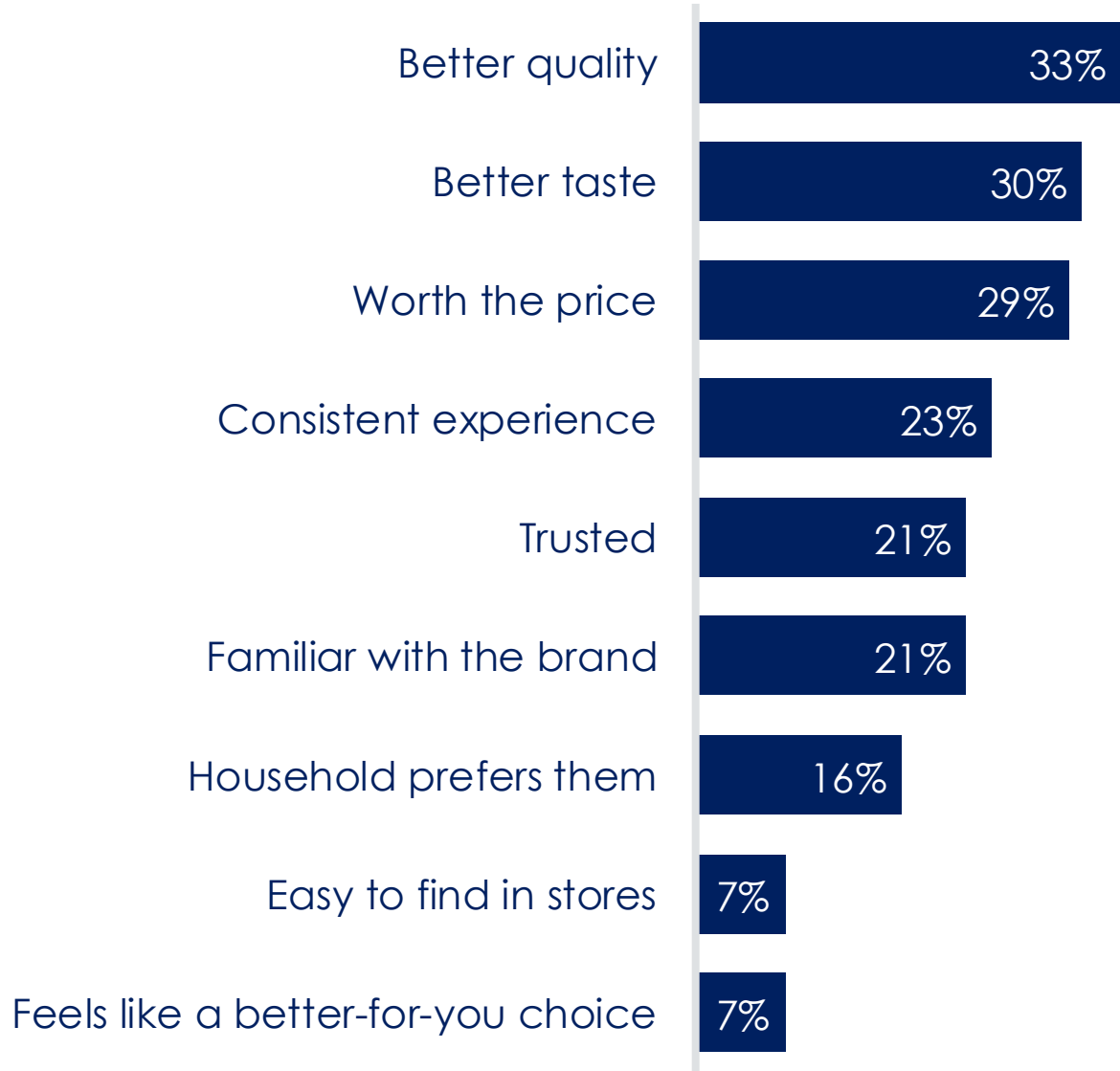
Brand loyalty is strongest in staple grocery categories such as dairy, beverages, coffee/tea, cheese, and frozen foods, where consumers consistently repurchase familiar brands.



Main Reason for Sticking with a Food Brand

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Consumers primarily stay loyal to food brands because of perceived quality, taste, and value, with consistency and trust also playing important roles. Baby Boomers place especially high importance on taste, and consistent experiences, while younger shoppers are slightly more driven by health-oriented perceptions and ease.



Gen Z	Millennials	Gen X	Baby Boomers
(261)	(563)	(474)	(183)
33%	34%	32%	31%
28%	29%	29%	39%
29%	28%	29%	33%
23%	20%	25%	30%
23%	22%	21%	19%
21%	21%	23%	20%
14%	17%	18%	14%
9%	9%	6%	3%
11%	9%	4%	4%



Produce

Fresh Produce Builds Store Loyalty

Fresh produce is the primary reason one in five shoppers choose their go-to grocery store, with its importance particularly high among urban consumers, parents, and Gen Z shoppers.

Who is Significantly More Likely to Choose A Main Store Based on Produce



Urban

23%



Parent

21%



Gen Z

21%

The Relationship of Brand Loyalty & Produce

One-quarter of grocery shoppers report repeatedly purchasing the same produce brands, with loyalty driven primarily by perceptions of better quality, strong value, and superior taste.



Base: Grocery shoppers (n=1,481)

Main Reasons for sticking with brands



Base: Grocery shoppers with a main store AND repurchase produce (n=385)

Frequency of Noticing Brand Names or Growers

Parents and those living in cities are more often noticing produce brand names.

21%



Notice Brand Names or Growers
Often or Always

Who is Significantly More Likely to
Notice Brand Names or Grower



32% Parents



31% Urban



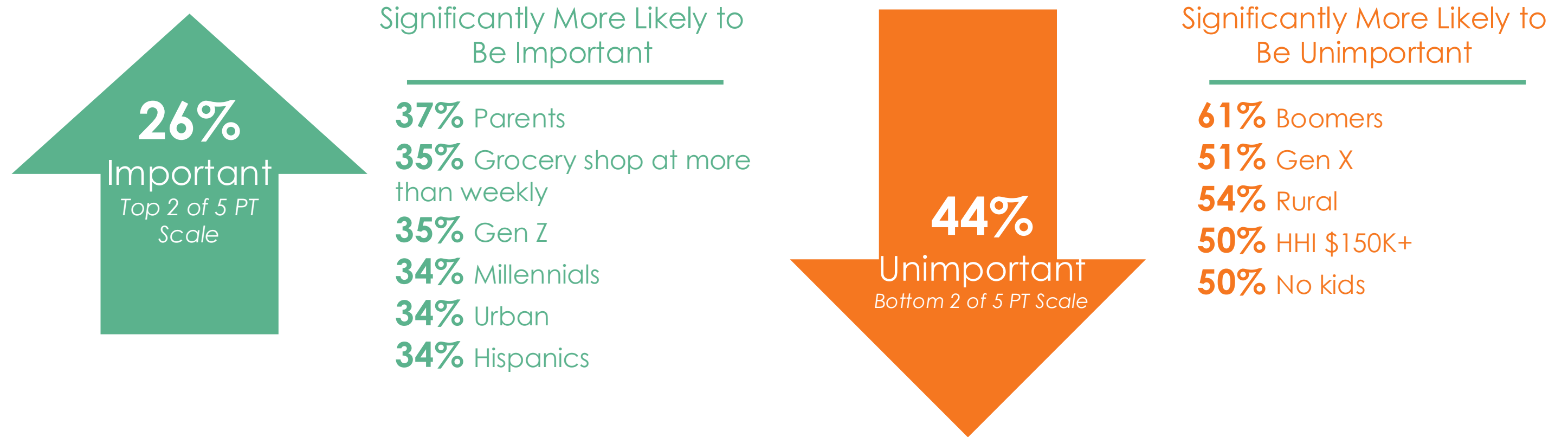
29% Hispanics



28% Millennials

Importance of Produce Brand Name

A quarter of Americans say that the produce brand is important. This is especially true among parents and those who shop at the grocery store most frequently.



*Indicates significant differences

What Brand or Grower Name Means to Produce Shoppers

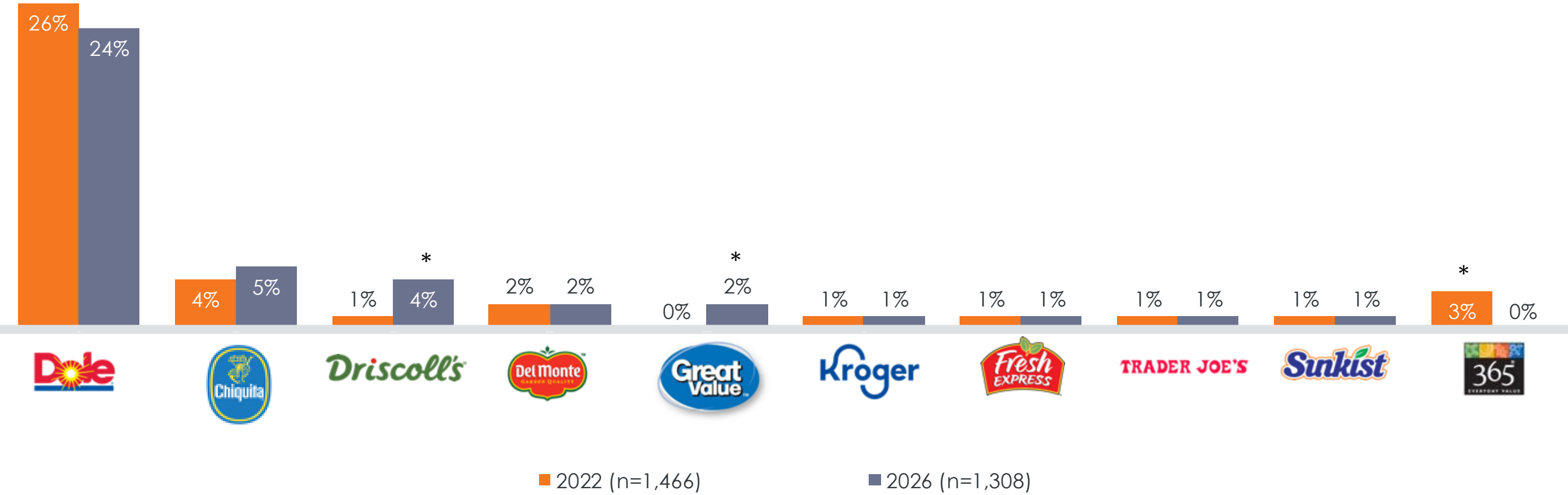
For produce shoppers, brand and grower names are most strongly associated with higher quality. Women are more likely to associate produce brands with trust and safety, Millennials place greater importance on taste, and Boomers over-index on consistent freshness.



*Indicates significant differences

Fresh Produce Brand That Comes to Mind

Fresh produce brand recall remains heavily concentrated around Dole, while there is significant gains for Driscoll's and Great Value, 365 show a drop in unaided recall compared to 2022.



*Indicates significant differences

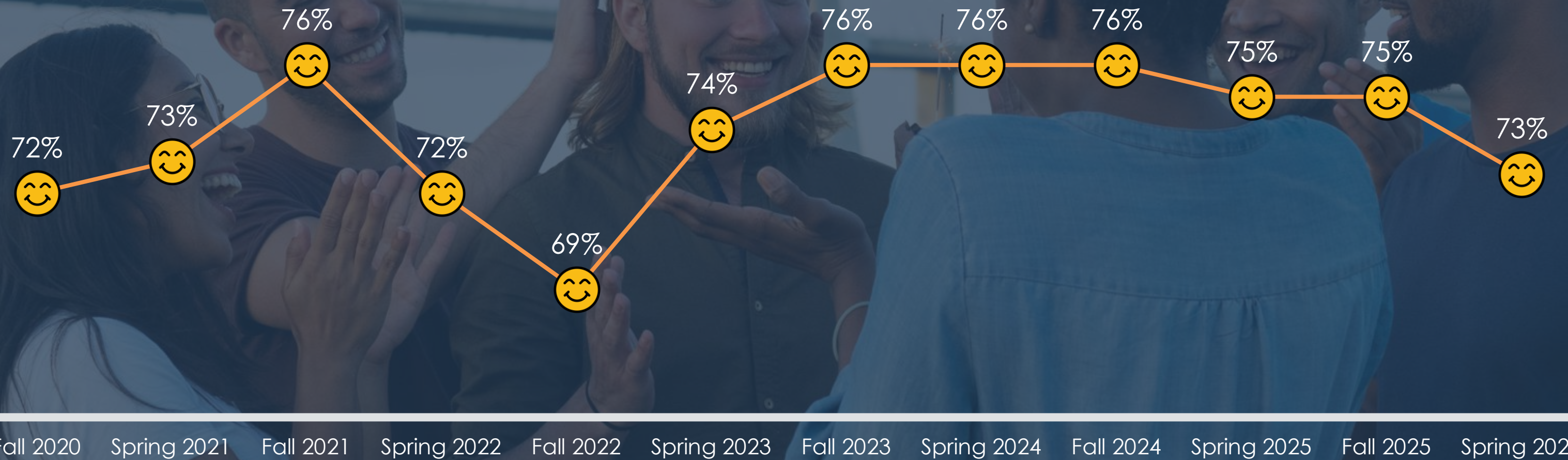
Optimism, Finances, & The Economy



Consumer Optimism

Overall, Americans experienced a slight dip in optimism for the future.

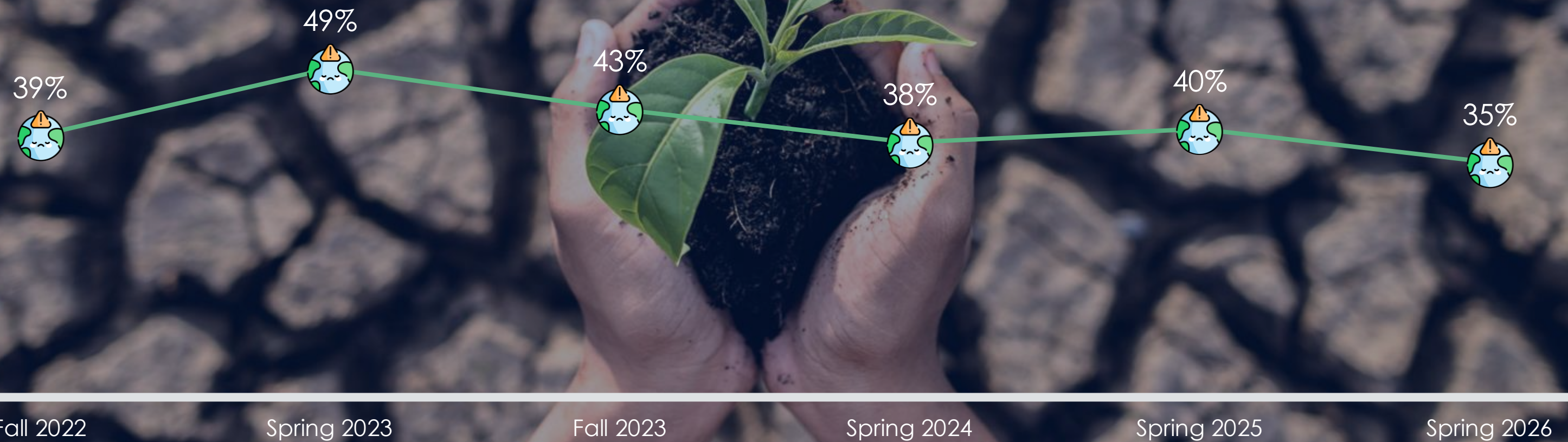
Optimism
Top 2 box on a 4-point scale



Climate Concerns

Concern about climate has declined overall since its peak in Spring 2023, with only modest fluctuations in recent periods.

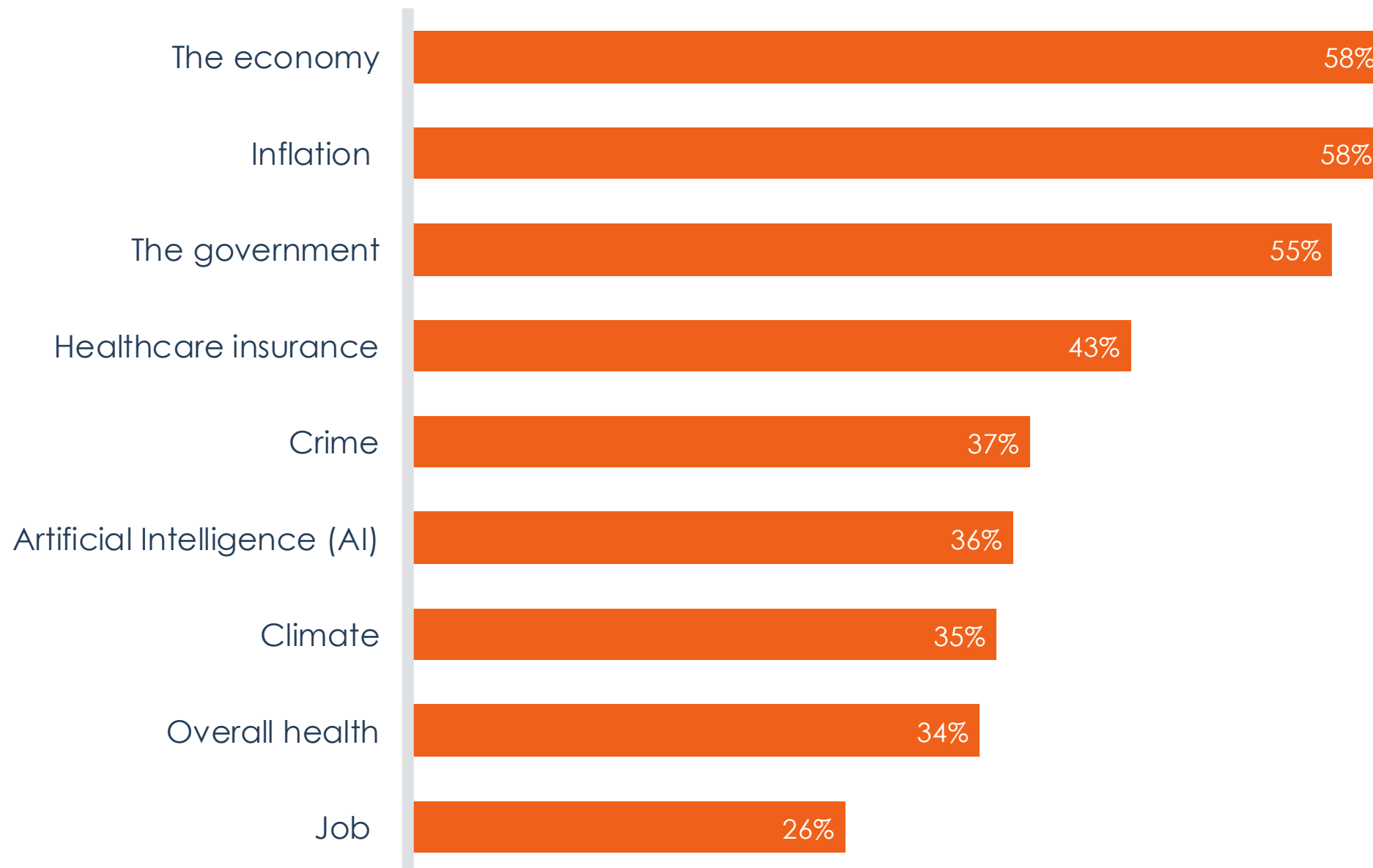
Concern on Climate
Top 2 box on a 5-point scale



Top Concerns Impacting Consumers

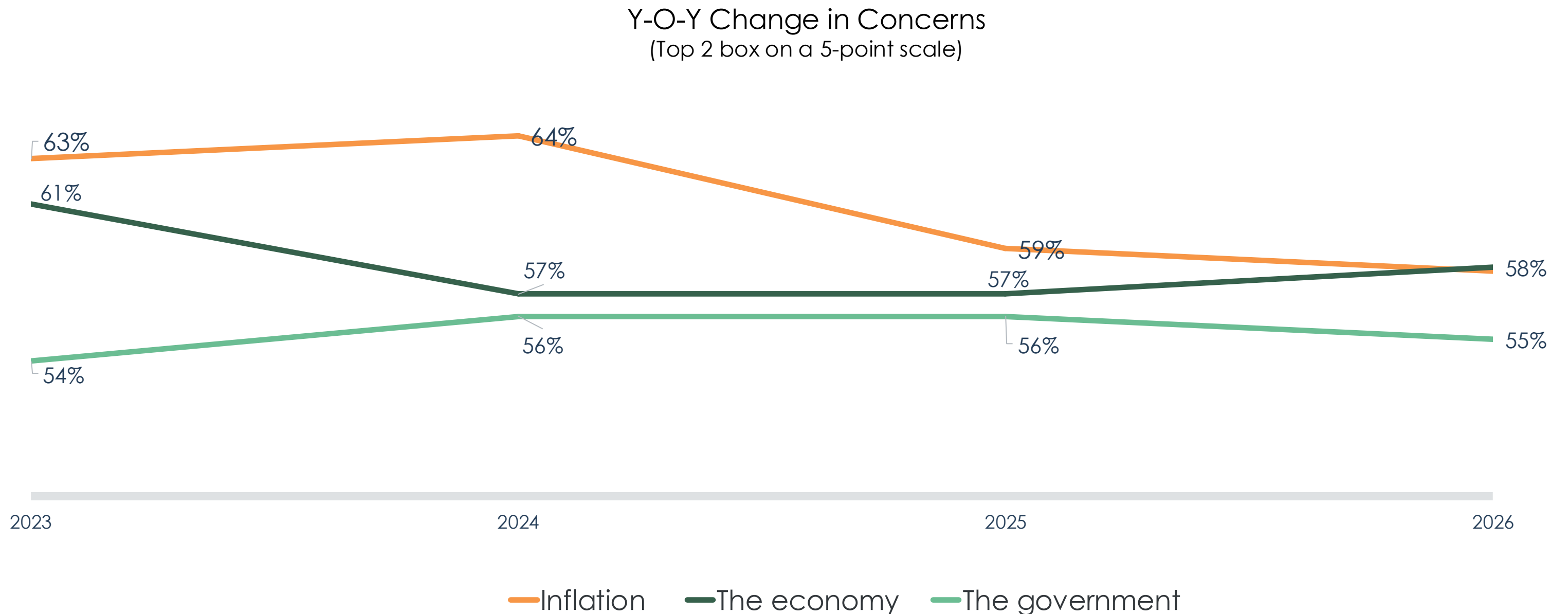
Economic concerns dominate, with the economy, inflation, and government leading, while healthcare remains a key personal worry and emerging issues like AI and climate follow behind.

Concern
(Top 2 box on a 5-point scale)



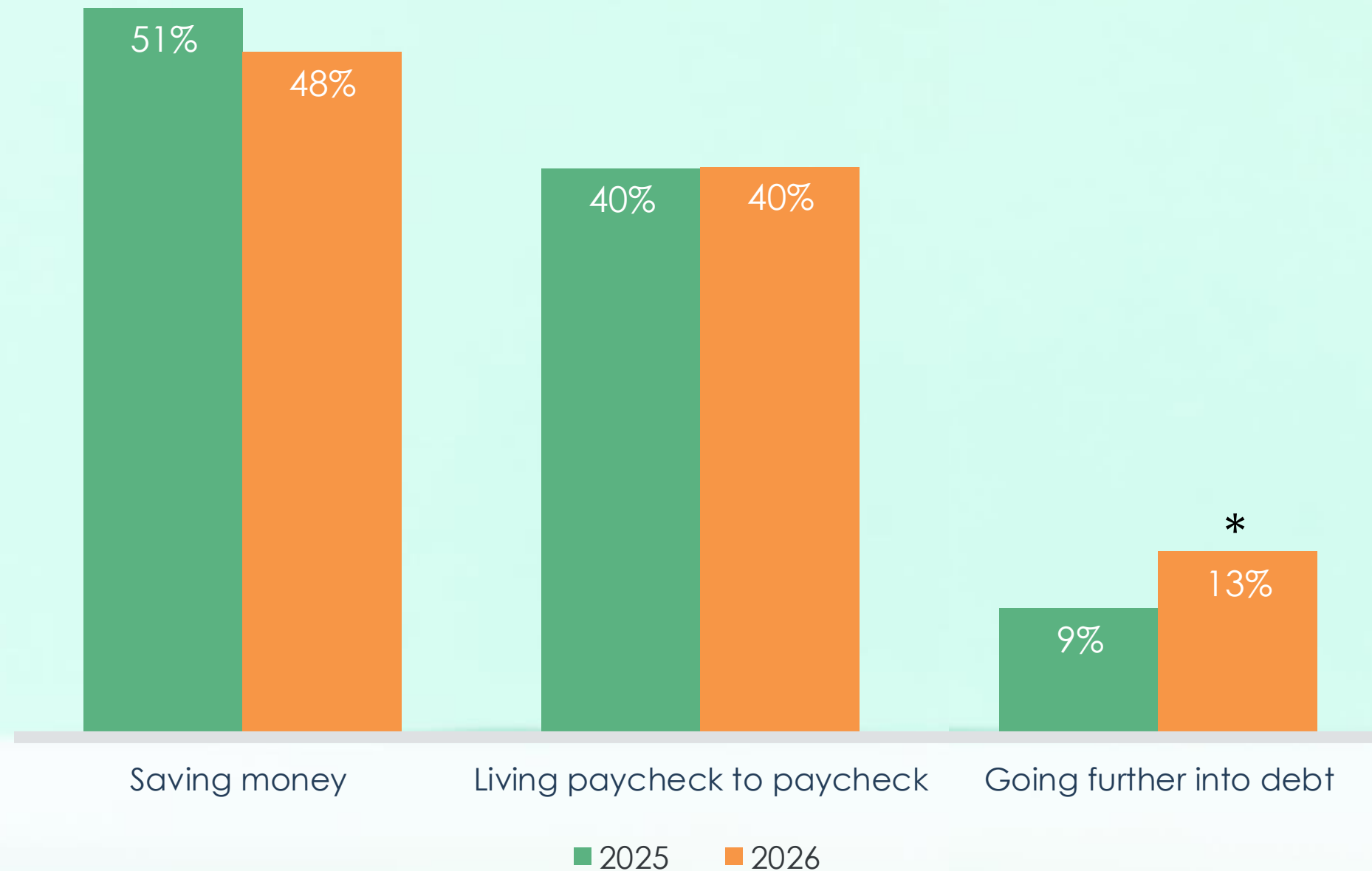
Top Concerns Impacting Consumers

Since 2023, American consumer concerns are still dominated by inflation and the economy, though both fell slightly over the years while concern on the government remains unchanged.



Financial Positions

Consumers are increasingly financially strained, with significantly more consumers going into debt this year.

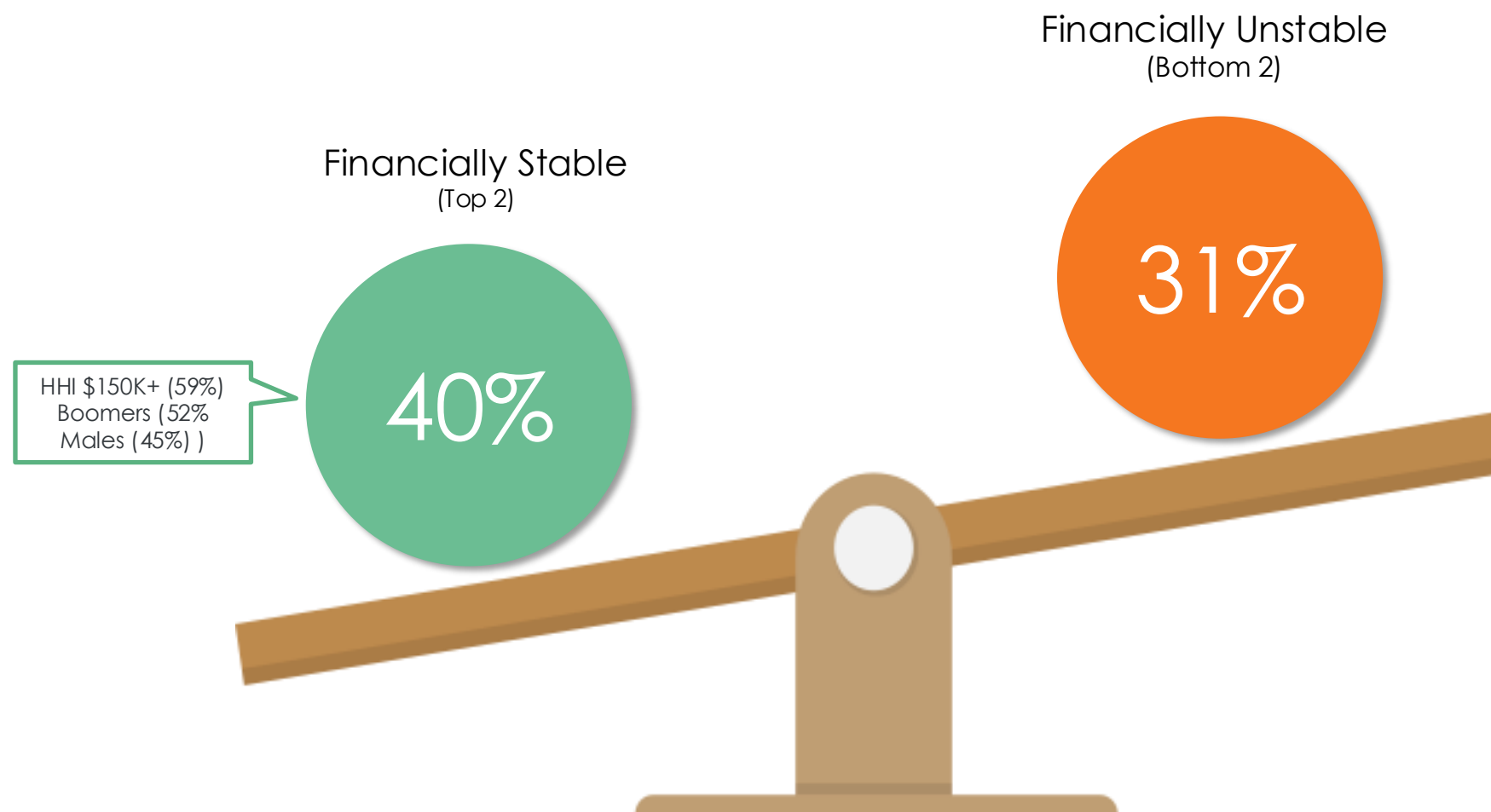


*Indicates significant differences

Future Financial Stability

Consumers are only modestly optimistic about their future financial stability, with a substantial share still feeling unstable. Confidence is notably stronger among higher-income households and older consumers.

Financial Stability in the Future



Grocery Shopper Profile

Frequent Grocery Shopper Profile

Gender



Female

Male

Frequent Grocery Shopper

Gen Pop

48%

50%

52%

50%

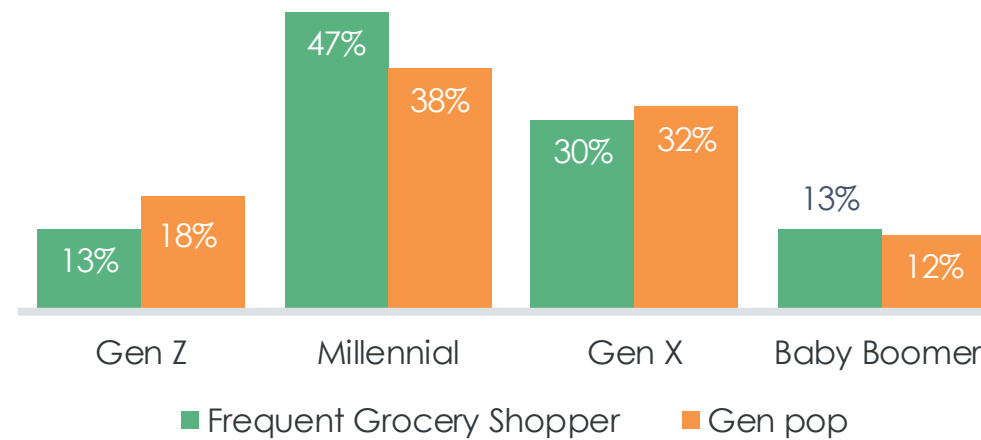
42 years old
Median Age



43 years old
Median Age



Generation



Children Under the Age of 18



Have children

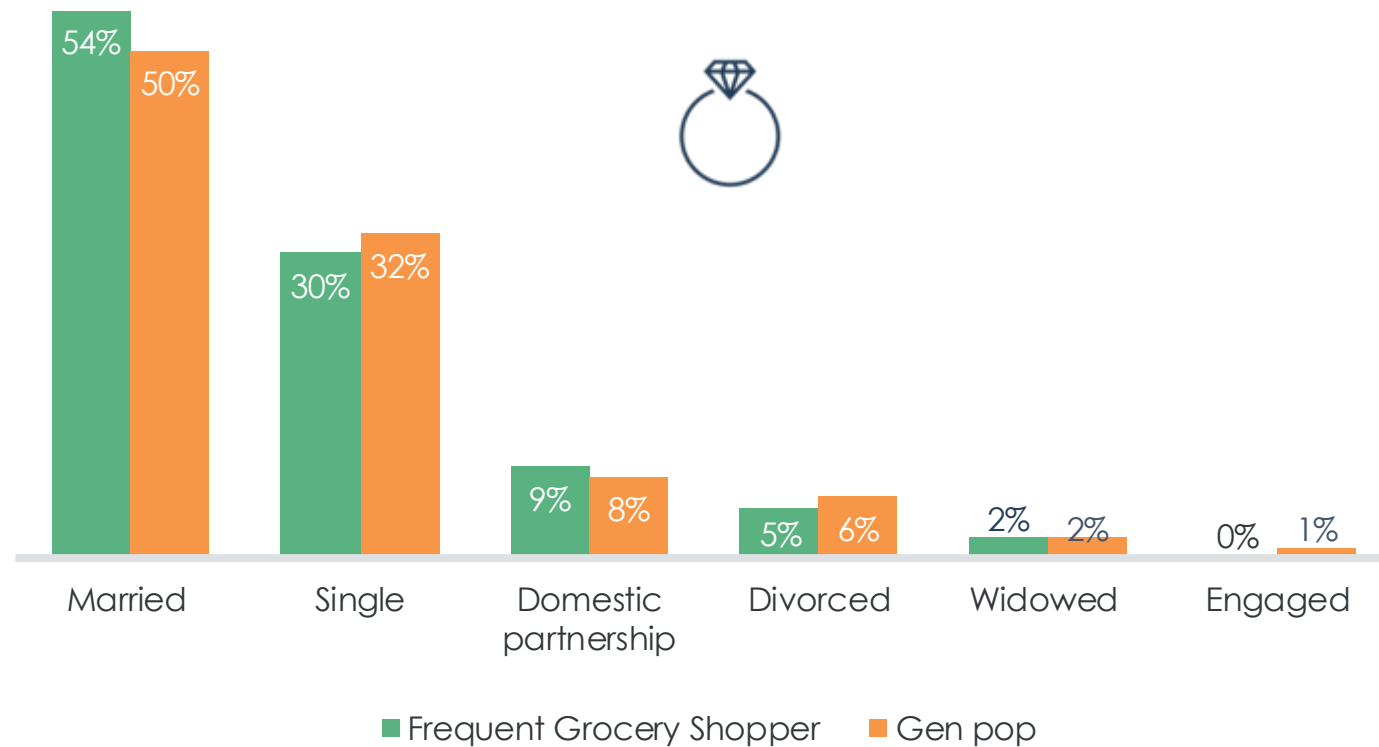
Frequent Grocery Shopper

Gen Pop

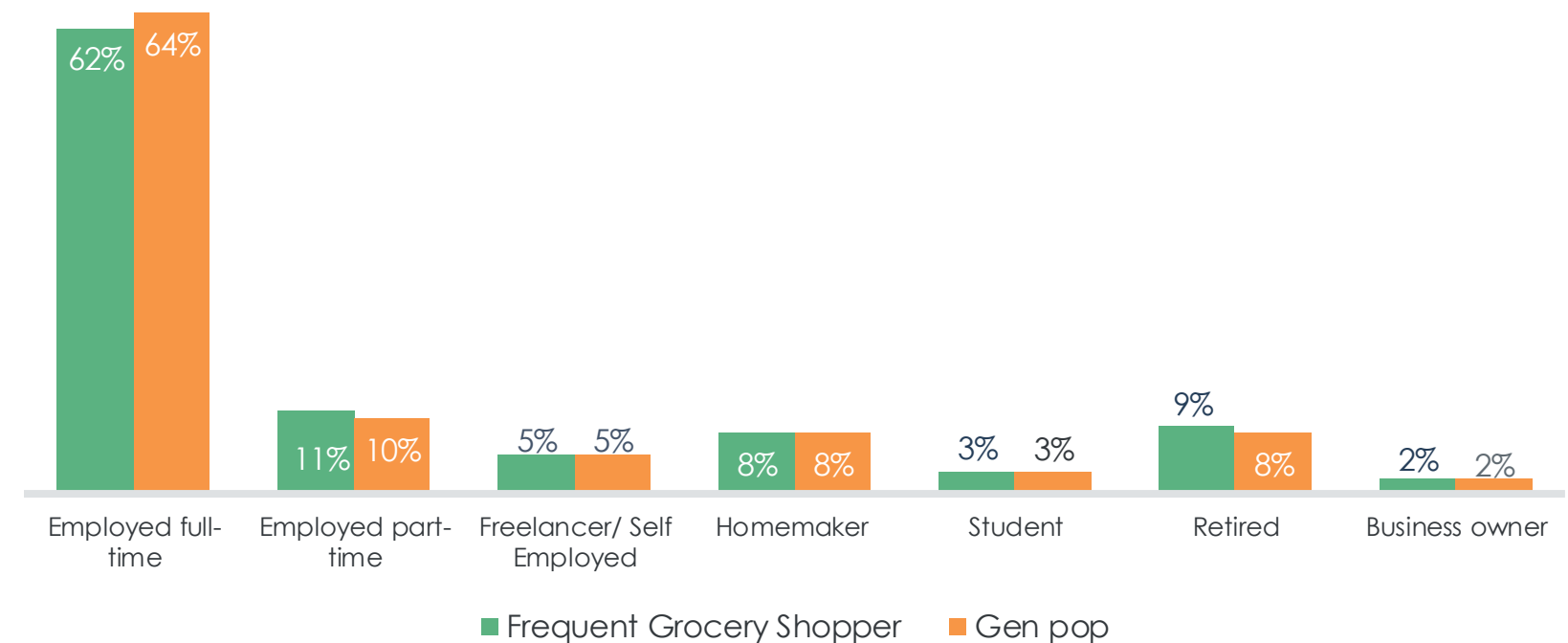
45%

38%

Marriage Status

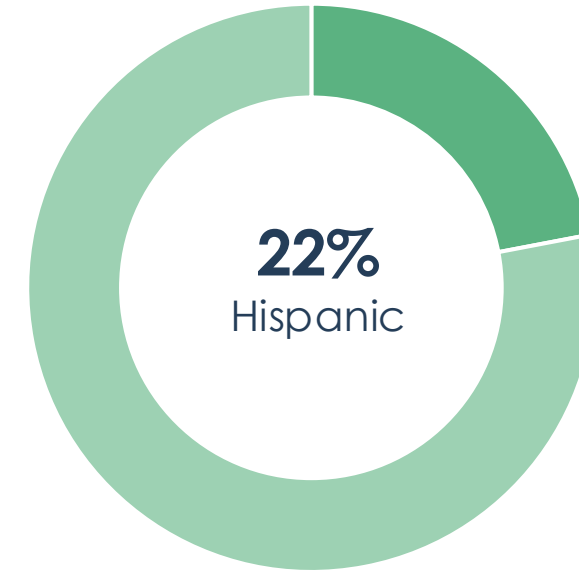
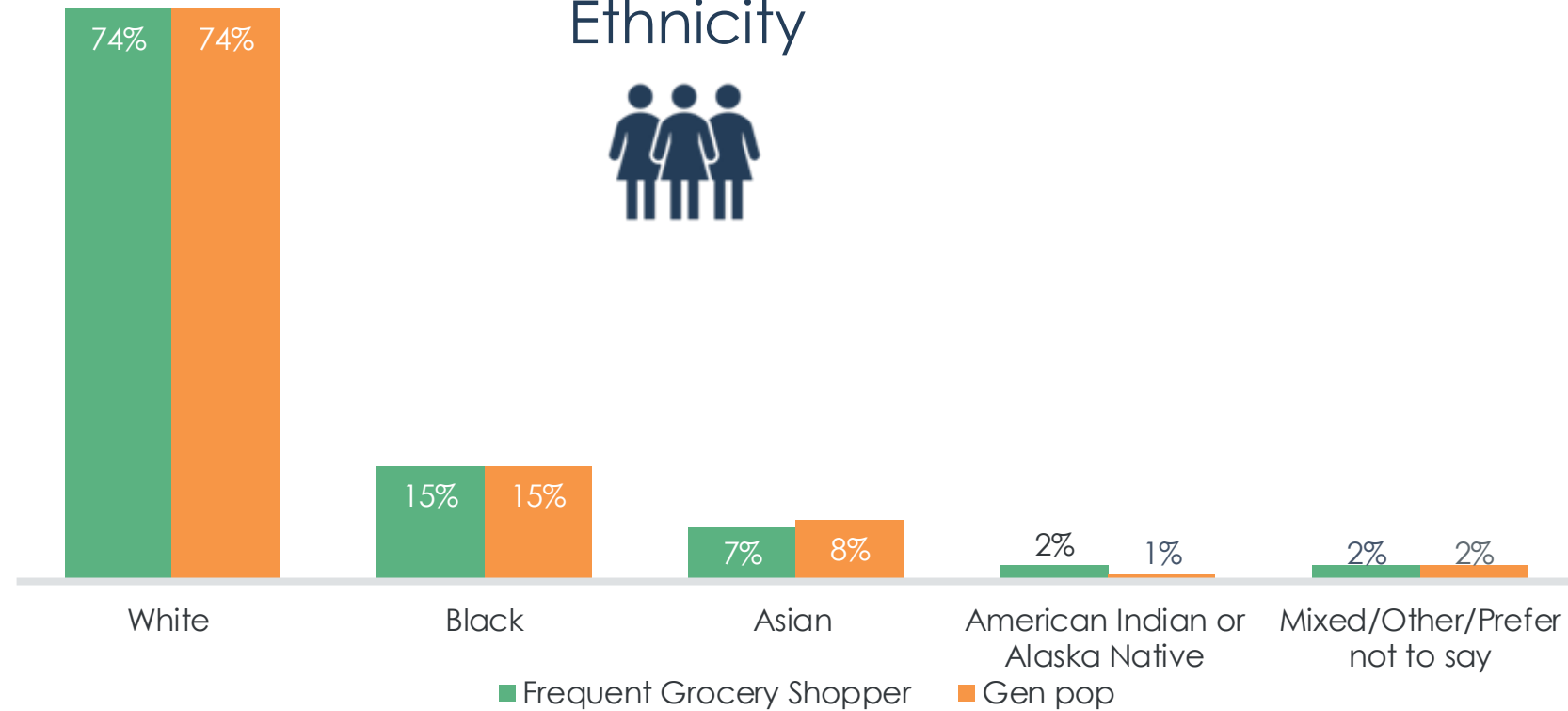


Employment Status

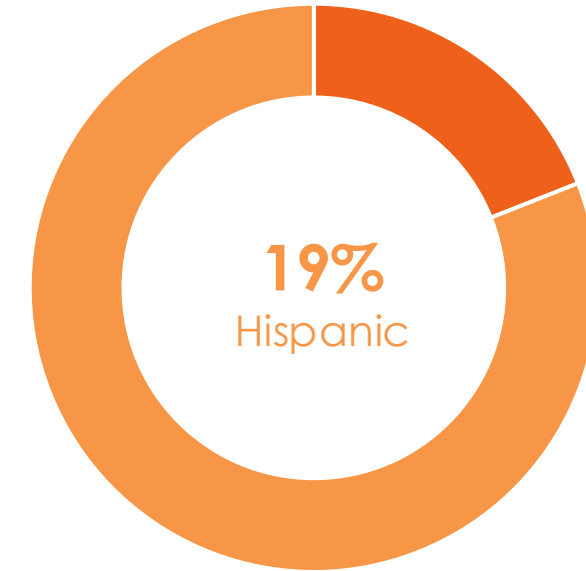


Frequent Grocery Shopper Profile

Ethnicity



Frequent Grocery Shopper



Gen pop

Area



Rural

Suburban

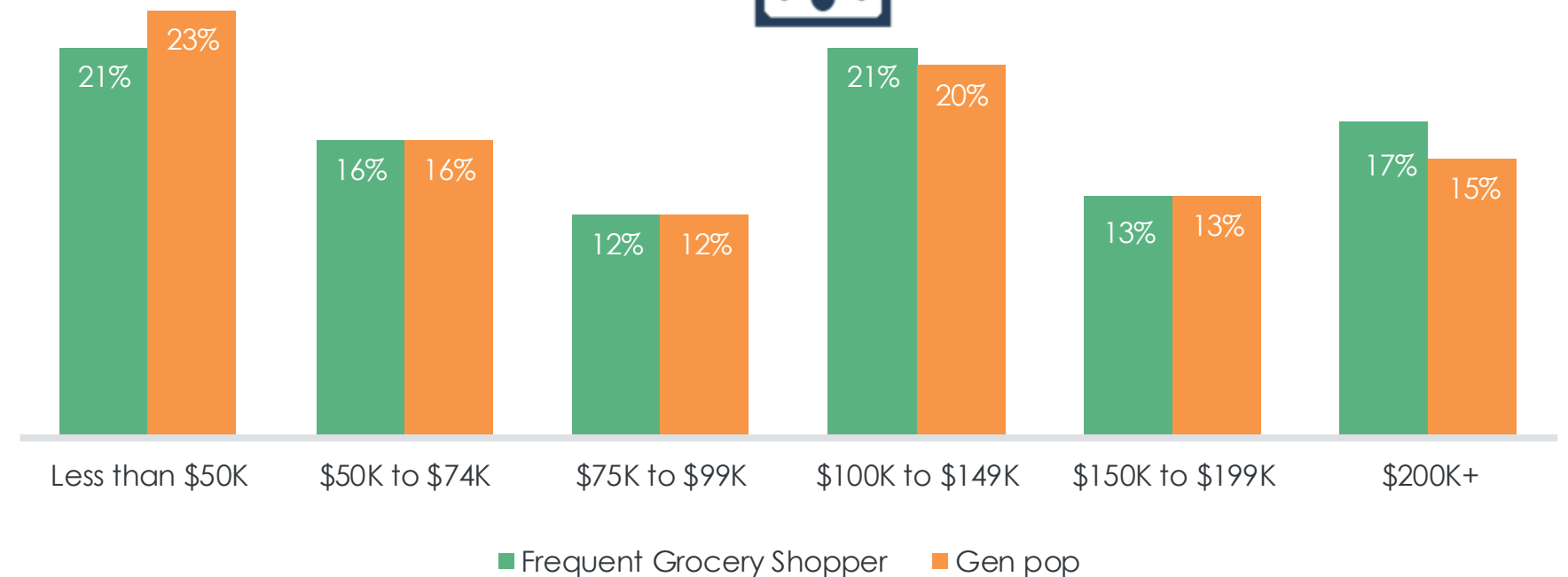
Urban

Frequent Grocery Shopper

Gen Pop

24%	49%	27%
24%	50%	26%

Household Income



About Provoke Insights

Provoke Insights is a full-service market research firm founded on the belief that research should better align with marketers' needs. Our mission is to empower brands by providing them with the insights they need to navigate today's ever-changing marketing landscape.

We partner directly with brands to design and execute custom research initiatives that inform critical marketing and business decisions. Unlike traditional market research firms, we take a more agile and innovative approach to our work. Our team is dedicated to developing initiatives that address the unique and evolving needs of today's market quickly and effectively.

What sets Provoke Insights apart from other research firms is our singular focus on branding and advertising initiatives. Our team consists of seasoned researchers who are also experienced brand and media strategists. With this expertise, we deliver actionable, tailored insights that help brands succeed in their marketing efforts. Our trends reports are designed to showcase our thinking and approach, and to spark conversations with brands looking for deeper, customized research.

For more information or to discuss a potential engagement, reach out to info@provokeinsights.com.

