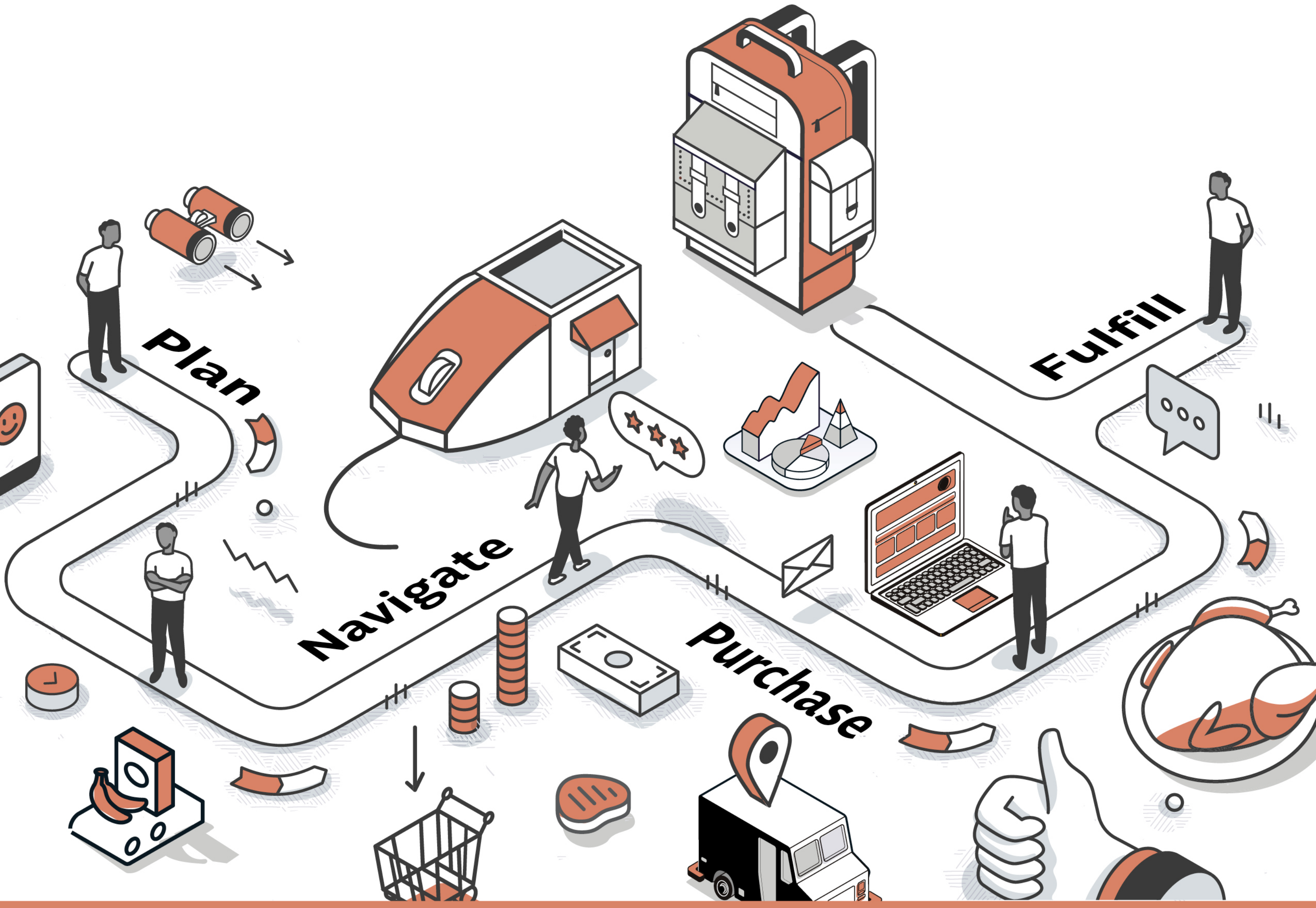
THE FOOD INDUSTRY ASSOCIATION

U.S. GROCERY SHOPPER TRENDS 2022

BACK TO SCHOOL



U.S. GROCERY SHOPPER TRENDS
HIGHLIGHTS FROM AUGUST 2022

Food accessability has displaced COVID-19 as the focus of shopper anxiety

Rising prices, particularly those for gas and food, are on shoppers' minds, though most still feel at least somewhat in control of their finances

- Most American shoppers are concerned about at least one aspect of food accessibility, with rising food prices being the dominant issue; the ability to pay for the food they need is a worry for a growing share of households, especially for lower-income households.
- Out-of-stock concerns are common but have stabilized.
- Rising prices are the perceived driver of increased household food spending, with notable increases perceived in the price of fresh meats and seafood, fresh produce, and dairy goods.
- While they believe they are spending more, shoppers seem to find it challenging to gauge their food spending accurately.

Despite this inflationary environment, shoppers continue to feel they have some control over their food spending. This is likely to change if inflation persists, so helping shoppers retain their feeling of control and helping them manage their spending now will position retailers better in the future.

Food shoppers are actively managing how and what they buy in response to rising prices

- Across household types, more shoppers are taking steps to manage price increases than in February.
- In addition to searching for deals, shoppers are more likely to say they are purchasing fewer items and more store brands as compared to February 2022.
    - Adult-only households are driving these changes, suggesting more barriers to change or less price sensitivity in households with kids.
- Loyalty programs are not typically used as cost savers, but most shoppers find them valuable.

Retailers have the opportunity to promote store brands, with a focus on delivering the quality consumers desire at a lower price, to remain being seen as a valued ally in shoppers' pursuit of health and financial well-being.

COVID-19 concerns continue to decline but slowly, bringing some lasting changes to shopping

- The number of shoppers expressing concern with COVID-19 has declined since last August, but with no change since February 2022.
- There is less worry about food shopping in person: two-thirds now feel comfortable being in stores.
- Indoor restaurant dining is viewed as increasingly safe, up 13 percentage points since February.
- One-third of adults say their food shopping has permanently changed in some way as a result of COVID-19, and almost as many say the pandemic has changed their approach to health.
- Shoppers who replaced their go-to (primary) grocery store with a mass retailer have largely maintained this channel shift, and mass continues to accrue more shoppers.

Although COVID-19 concerns have declined, visible reassurance (e.g., cart sanitation stations, signage) of cleaning and health/safety measures may become baseline requirements.

Even more than COVID-19, rising prices concern parents shopping for back-to-school needs

- Despite an overall concern with COVID-19 higher than that of other Americans, parents generally feel it is safe to send kids to school in person. One-sixth of those in households with kids still feel it's very risky.
- Households with kids report high concern with the cost of both school supplies and clothing.
- The vast majority feel they have at least some control over childcare costs.

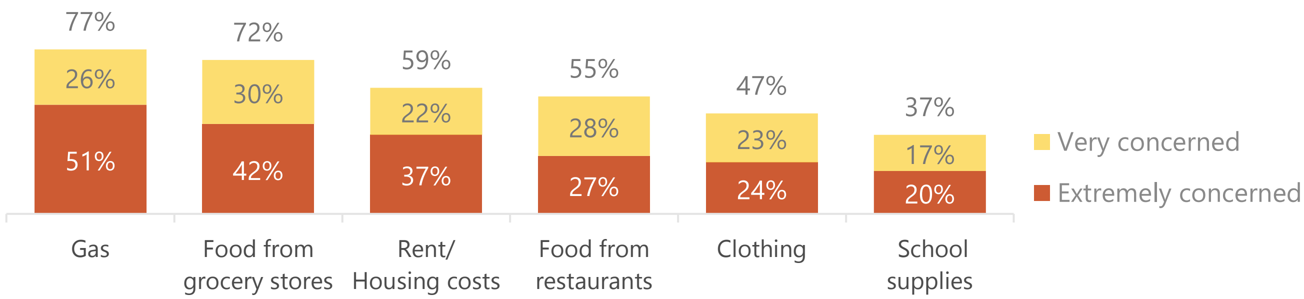
Rising prices, particularly gas and food, are on shoppers' minds. The majority feel in control of their finances.

Shoppers' current worries about rising prices lay with essentials, including gas, food and housing. While rising gas prices are the top concern (77%), inflation reports dated August 10 note that the gasoline index fell 7.7% in July, offsetting increases in food and shelter.* Overall, 66% of shoppers are extremely concerned with rising prices in at least one category. Households with kids are more likely to worry about rising prices in select categories, including school supplies (64%) and clothing (65%), two important factors as the back-to-school season progresses.

64% **of households with kids are concerned about the rising prices of school supplies and** **65%** **about clothing**

CHART 5: CONCERNS WITH RISING PRICES

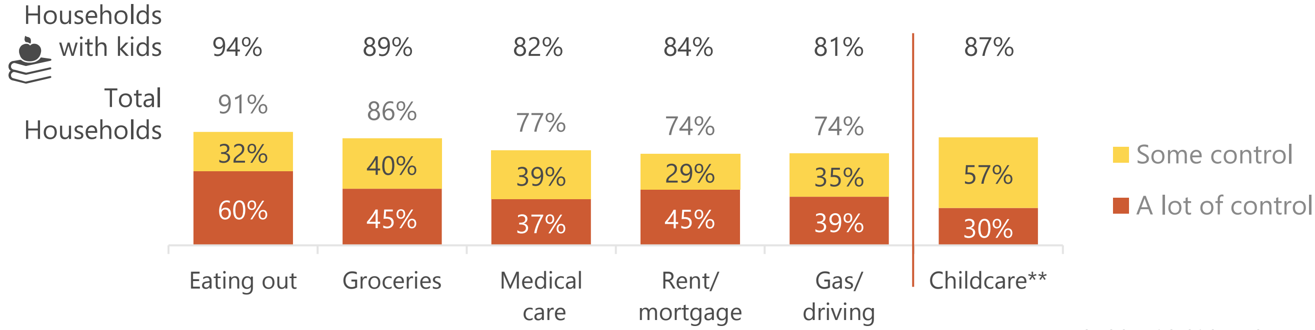
Among all shoppers



On a more positive note, shoppers feel as though they have at least some control over their food needs. The vast majority (91%) feel that they have at least some control when it comes to eating out, and 86% feel as though they have some control over their grocery shopping budgets. Unfortunately, income does play a role, and lower-income households feel as though they have the least control over each category surveyed. For shoppers with household incomes under $40K per year, lack of control is felt most intensely in the areas of childcare (35% no control) and gas (30%no control). Those making $100K or more feel most in control across all areas measured. Households with kids, to a greater extent than all shoppers, feel they have at least some control of most aspects of these finances.

CHART 6: DEGREE OF CONTROL OVER FINANCES

Among all shoppers



**Among Households with kids only

Source: FMI U.S. Grocery Shopper Tracker Aug 2022 Q. In addition to rising prices on specific foods, how concerned are you with prices rising in the following areas? n=1,490; Q. To what degree do you feel you have control of your finances for...? Base n=1,490

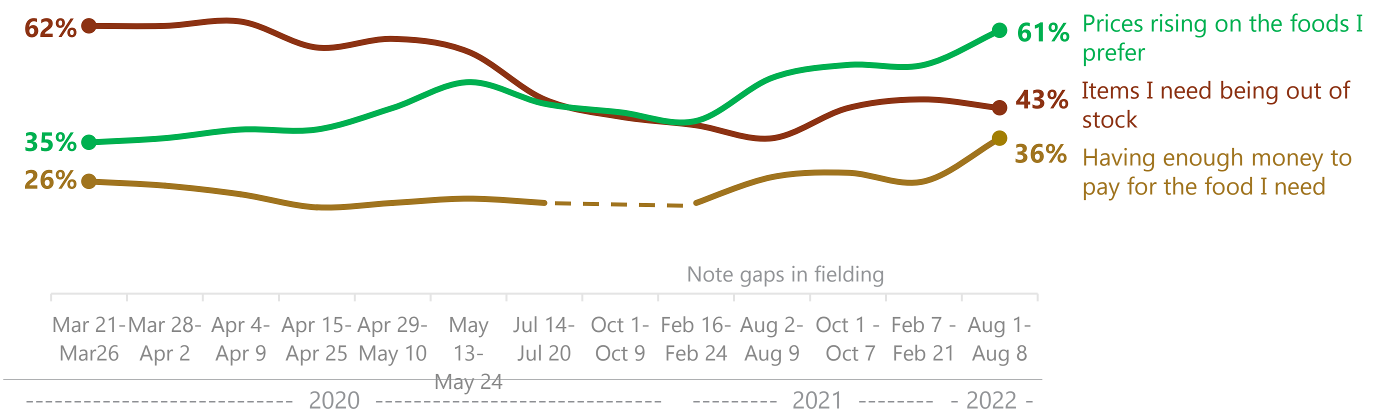
*Source: https://www.bls.gov/news.release/cpi.nr0.htm

Rising prices mean that food insecurity has also increased, especially among lower-income households

Rising prices remain the primary concern with respect to food as 61% express concern with prices rising on the foods they prefer, up 8 pts compared to February. However, also climbing is the percent of consumers who worry about their ability to pay for needed food, now at 36%, up 10 pts compared to February. Food insecurity is highest among those in households who make less than $40K (47%). Two-thirds (67%) of shoppers who earn between $40K and $100K are concerned about rising prices, much higher than those at either end of the income continuum (under $40K-58%, over $100K-56%).

CHART 7: CONCERNS WITH OBTAINING FOOD
Among all shoppers

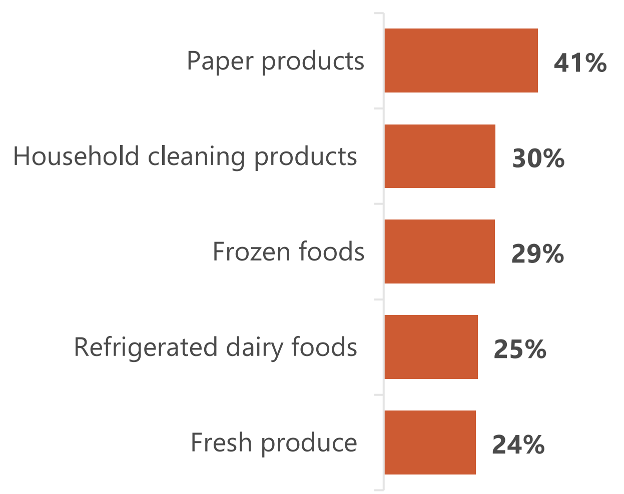
90% cite at least one concern about access to food



Issues with out-of-stocks remain, but with little change compared to February or last October. Paper products top the list of items where shoppers have noticed out-of-stocks. This could be an extension of the toilet paper concern from the past or could be something newer. Other areas where out-of-stocks are mentioned include cleaning products, frozen foods, dairy and fresh produce. Older shoppers, Gen X (48%) and Boomers/ Matures (50%), are more likely to notice out-of-stocks than Gen Z (35%) or Millennials (34%).

NOTE: While shortage issues with infant formula have been in the news, the sample size of product purchasers is too small to analyze.

CHART 8: TOP 5 ITEMS SHOPPERS HAVE NOTICED ARE OUT OF STOCK
Among shoppers concerned with out-of-stocks

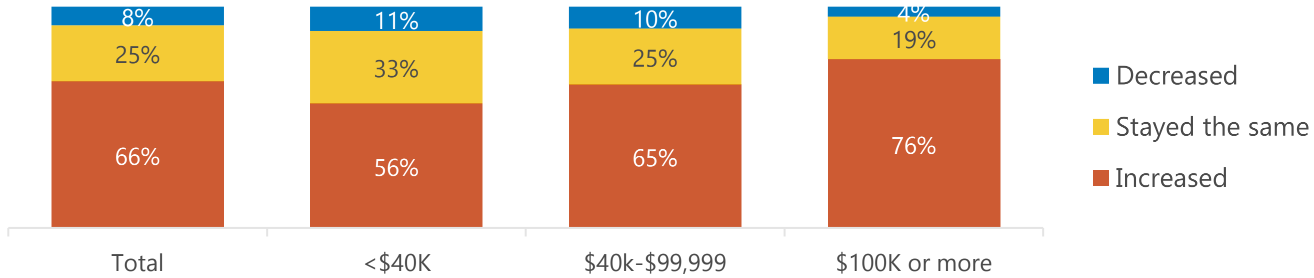


Source: FMI U.S. Grocery Shopper Tracker Aug 2022 and Trends and Trackers 2020-2022 Q. "When you obtain food for your home nowadays, which of these would you say you are especially concerned about?" Individual waves total n=1,027/1,036/1,033/1,027/1,020/1,024/1,035/1,022/1,001/2,056/1,617/1,601/2,091/1,490; Q. What types of items have you noticed being out of stock? n=645

Shoppers say they are spending more on groceries, but the shifting food environment makes it challenging for them to report their spending precisely

Two-thirds of shoppers say they're spending more on groceries than a year ago, up from 59% in February. Just about one-third (31%) say they are spending "a lot more," up from 23% in February. While those with sufficient resources have been able to absorb food price increases, others don't have the luxury of spending more on food: three-fourths of higher-income shoppers report an increase, 43% of lower-income shoppers report declines or no increase.

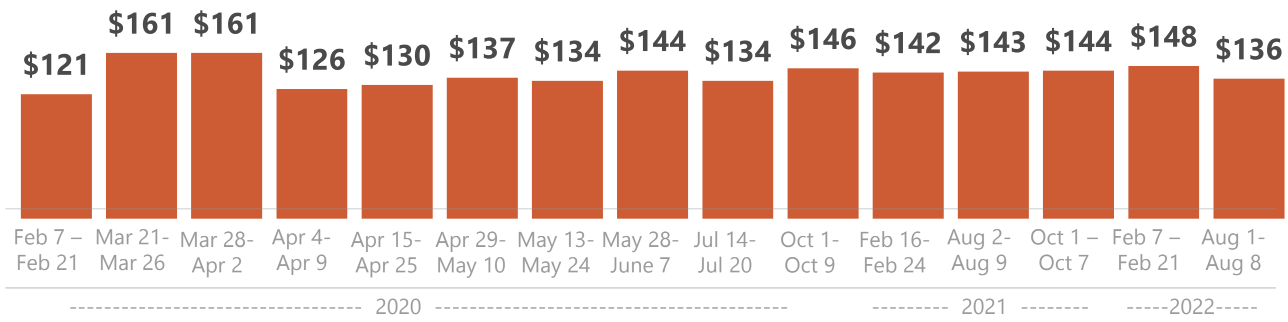
CHART 9: YEAR OVER YEAR CHANGE IN GROCERY SPENDING
Among all shoppers



When asked how much they spend on groceries in a typical week, shoppers in August reported somewhat lower budgets on average ($136) than those in February. Some of this may be due to a slight seasonal effect—people tend to eat out more in the summer. But this reported decline is also consistent with belt tightening, even if only aspirational. Nearly four-in-ten (37%) shoppers report they've "bought fewer items" recently to deal with higher prices. And as noted above, lower-income shoppers were more likely to report a decline in spending, while upper-income shoppers had only slight shifts.

As importantly, shoppers contemplating their typical weekly spending on food and groceries now must sort through a more complex set of considerations than in the past. With volatile prices, dynamic deals and chaotic restaurant choices, what counts as a "typical" week? In this environment, shoppers are likely to find it challenging to gauge their own spending.

CHART 10: HOUSEHOLD WEEKLY SPENDING FOR GROCERIES
Among all shoppers



Source: FMI U.S. Grocery Shopper Tracker Aug 2022 and Trends and Trackers 2020-2022 Q. About how much has your household spent on groceries in the PAST 7 DAYS? Individual waves total n=1,027/1,036/1,033/1,027/1,020/1,024/1,035/1,022/1,001. Source: FMI U.S. Grocery Shopper Trends and Trackers 2021-2022 Q. On average, about how much does your household spend each week on groceries?. Consider only grocery type items. n=2,056/1,617/1,601/2,091

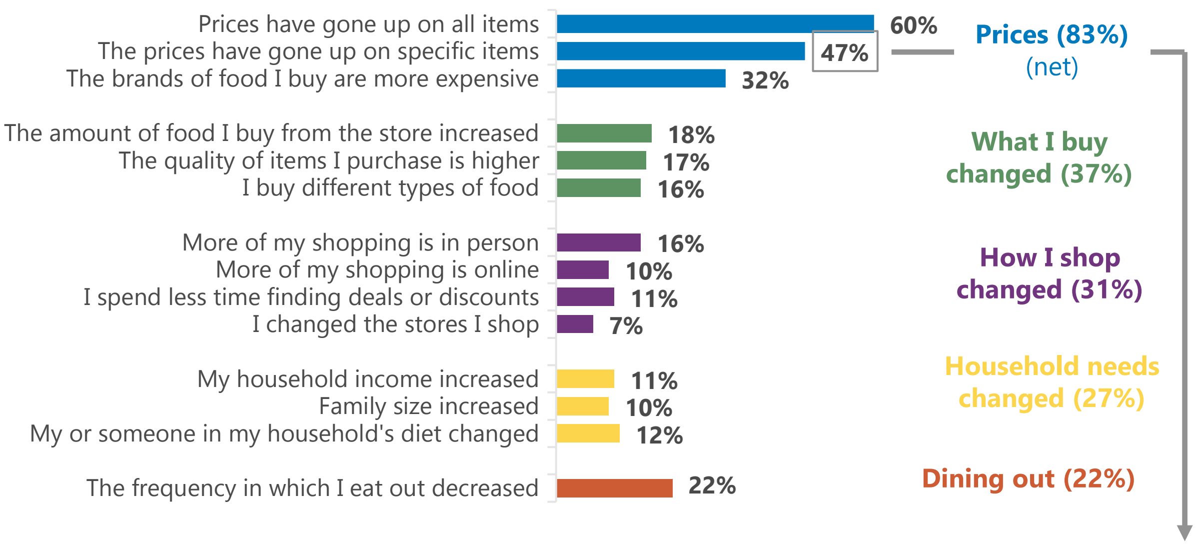
Consumers attribute increased grocery spend to rising prices above all else

Food prices rose 14.4% as of July 31 compared to the same month in 2021. Sixty percent of those who noted they are spending more on food blame rising prices across the board. Changes in buying habits—the amount of food purchased, quality of food and type of food in general—come in as a distant second to rising prices. Households with children are much more likely than those without to have shifts in household needs (51%) or changed what they bought (55%).

55% of households with children changed what they buy and 51% shift in household needs

CHART 13: PERCEIVED CAUSES OF INCREASED GROCERY SPENDING

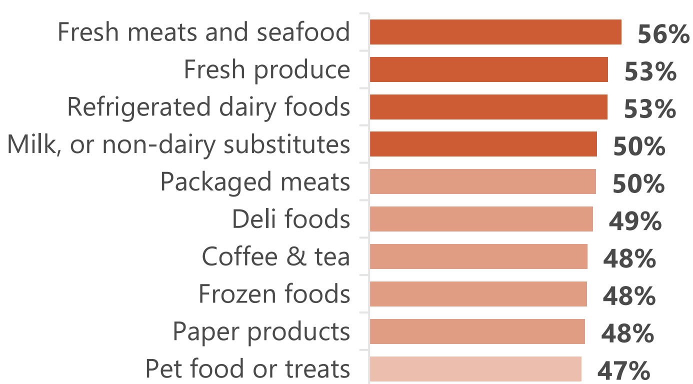
Among those who say they are spending more than a year ago



Consumers note that they are seeing increases in products across the board, with most noting increases in fresh meats, produce and dairy. Data from IRI* confirms some of these trends showing increases in spend for refrigerated eggs (+46.8%), frozen dinners and entrees (+22.8%), butter and margarine (+26.3%), frozen pizza (+17.8%) and center store bread (+15.4%) in July 2022 as compared to July 2021.

CHART 14: TOP 10 ITEMS WHERE SHOPPERS HAVE NOTICED PRICES HAVE INCREASED

Among category buyers who noted price increases



Products where shoppers have LEAST NOTICED price increases include sweets, condiments, meal kits, plant-based meat alternatives, and non-prescription drugs.

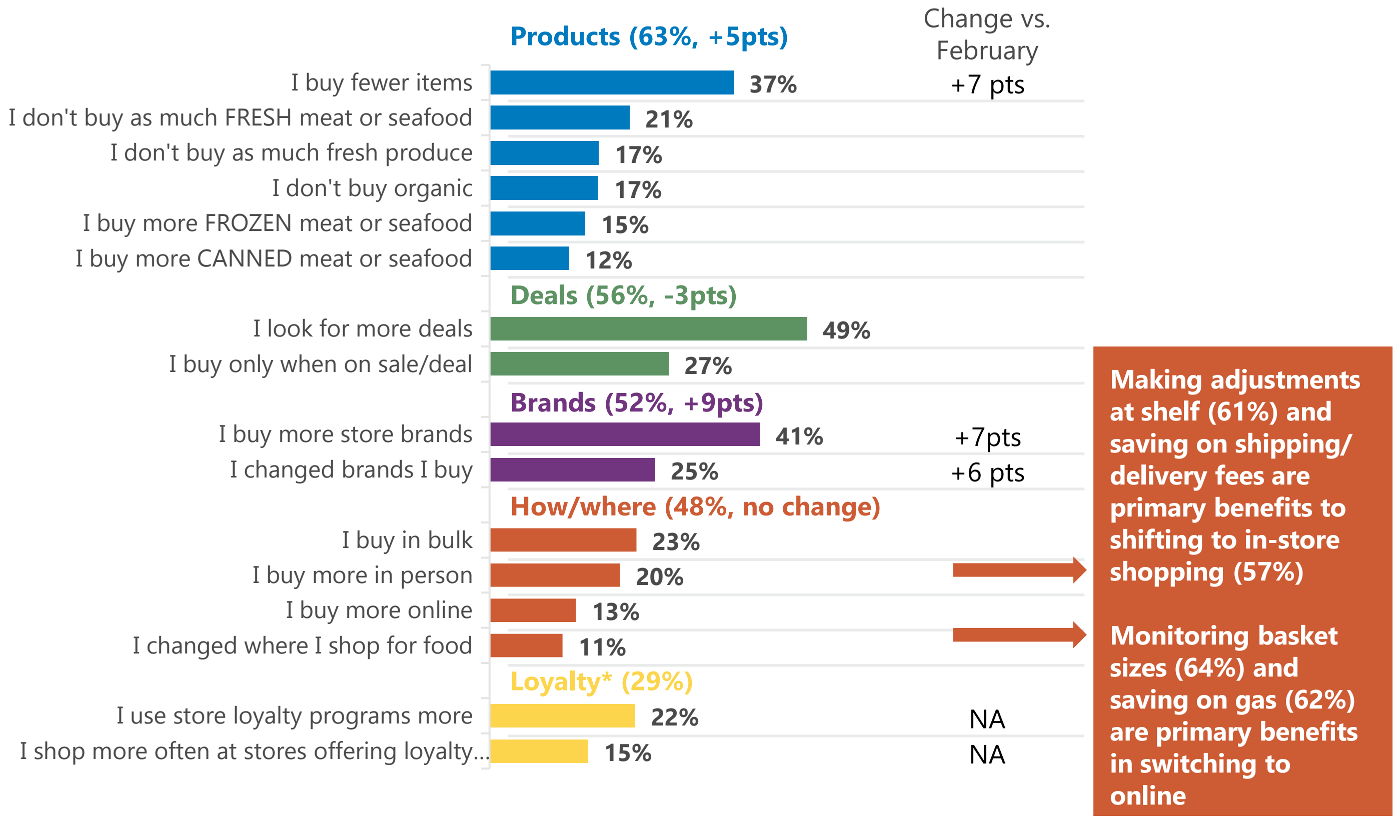
Source: FMI U.S. Grocery Shopper Trends August 2022 Q. "Which of the following led to the INCREASE in your OVERALL spending on groceries? (Select all that apply)" n=1238; Q. "For what types of items have the prices gone up? (Select all that apply)" n=varies
* Source https://storebrands.com/inflation-hits-eggs-frozen-items-hardest-july?utm_source=swiftmail&utm_medium=email&utm_campaign=Store%20Brands%20Today&oly_enc_id=1794C7318367E6V

Shoppers are actively managing their baskets to mitigate the impact of rising prices

Looking for deals remains the single most common step taken to address rising prices; however, compared to February, more shoppers are making changes to their basket. Switching to store brands is becoming more prevalent, especially among Boomers (46%). Lower-income households (47%) are more likely than others to address prices by shrinking their overall basket size, whereas households with kids are making changes to how they are shopping, with increased purchasing online (24%). This change may be due not only to prices but also to other factors, such as convenience and control.

CHART 15: STEPS TAKEN TO ADDRESS RISING PRICES

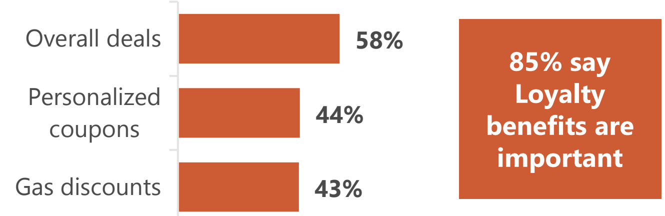
Among those concerned with rising prices



Generally speaking, shoppers join loyalty programs for deals, with fewer focusing on gas points. Loyalty programs are seen as ways to address rising prices by just over one-quarter of shoppers (29%), with 85% seeing some benefit and only 15% of shoppers seeing no benefit to participating in loyalty programs.

CHART 16: MOST IMPORTANT LOYALTY PROGRAM BENEFITS

Among All Shoppers



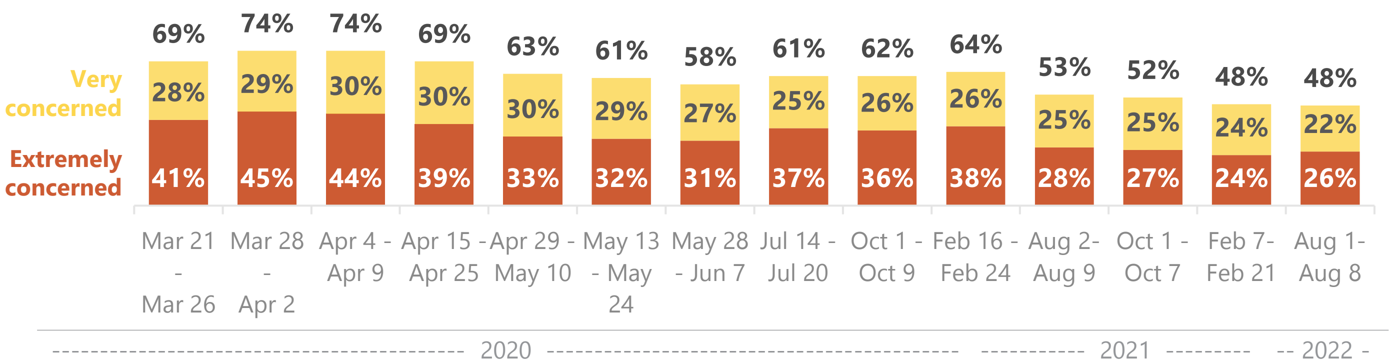
Source: FMI U.S. Grocery Shopper Trends August 2022 Q: "What steps, if any, have you taken to address your concerns with rising prices on food you prefer? (Select all that apply") Base: those who are concerned with rising prices, n=915; Q. How does buying more online help with rising prices? n=121; Q. How does buying more in store help with rising prices? n=183; Q. Which grocery store loyalty program benefits are most important to you? n=1,490

While concern with COVID-19 lingers, shoppers feel safer shopping in person and eating out

After nearly two and a half years of the COVID-19 pandemic, overall concern remains but appears to have stabilized as many shoppers establish their new day-to-day routine. Still, intensity of concern remains high for some consumers, with one-quarter (26%) being extremely concerned. As families prepare for kids to go back to school, concern within households with kids remains high (40% extremely concerned, 66% concerned overall). However, the majority (60% overall and 66% of those in households with kids) feel it is acceptable/safe to send a child to school in person, up 9 pts both overall and among households with children. Regionally, those in the Midwest have the lowest concern with COVID-19 (39%), and those on the two coasts have the highest (57% East, 56% West).

CHART 1: CONCERN ABOUT COVID-19

Among all shoppers

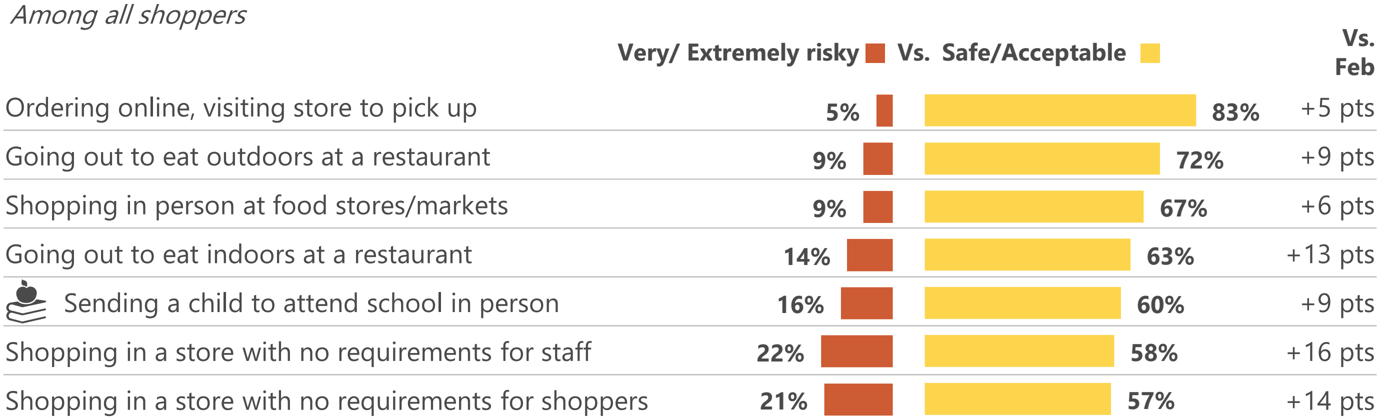


The good news is that despite the lingering concern, shoppers are seeing less risk in some common shopping and eating activities. Ordering online remains one of the least risky activities, but many shoppers are back in the store as 67% of shoppers feel it is acceptable/safe shopping in person at food stores, up 6 pts compared to February.

Trepidation of eating indoors at restaurants is also waning, with almost two-thirds (63%) feeling it is acceptable/safe to do so, up 13 pts since February.

CHART 2: LEVEL OF RISK — PERCEIVED RISK/SAFETY OF CONDUCTING ACTIVITIES IN NEXT 30 DAYS

Among all shoppers



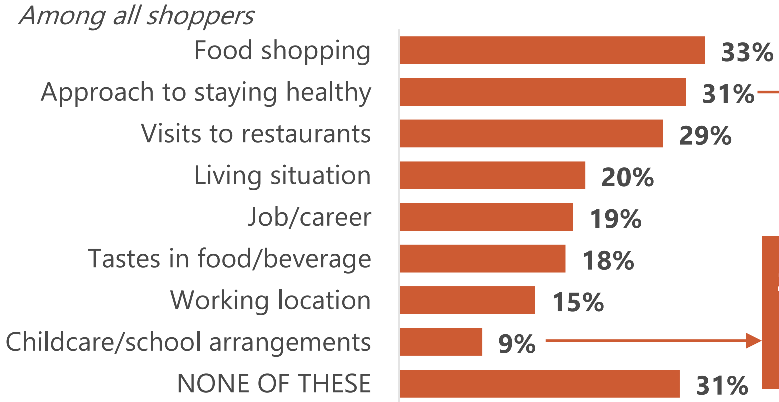
Source: FMI U.S. Grocery Shopper Tracker Aug 2022 and Trends and Trackers 2020-2022 Q. How concerned are you, if at all, about COVID-19?" Individual waves total n=1,027/1,036/1,033/1,027/1,020/1,024/1,035/1,022/1,001/2,056/1,617/1,601/2,091/1490; Q: "And thinking about conditions in your community due to the coronavirus pandemic, how RISKY or unsafe do you consider each of these activities during the NEXT 30 DAYS?" n=1,490

COVID-19 is expected to have a long-lasting impact on the way people procure food

While shoppers express more comfort with 'getting back to normal,' there is no doubt that the COVID-19 pandemic has had a long-lasting impact on their lives. Over two-thirds (69%) noted that there has been permanent change in at least one aspect of their lives, with one-third (33%) having changed the way they shop for food. As noted, both later in this report and in other FMI *U.S. Grocery Shopper Trends 2022* reports, the shift towards shopping online is one of the major changes in how people shop, but also important is a change in shoppers' approach to staying healthy. Nearly half (45%) of those who changed their approach to eating put a lot of effort into making healthier food choices.

CHART 3: PAST-YEAR CHANGES CONSUMERS SEE AS PERMANENT CHANGES AS A RESULT OF THE COVID-19 PANDEMIC

Among all shoppers



45% of those who say their approach to staying healthy changed put a lot of effort into making healthy food choices vs. 36% overall

24% among households with kids

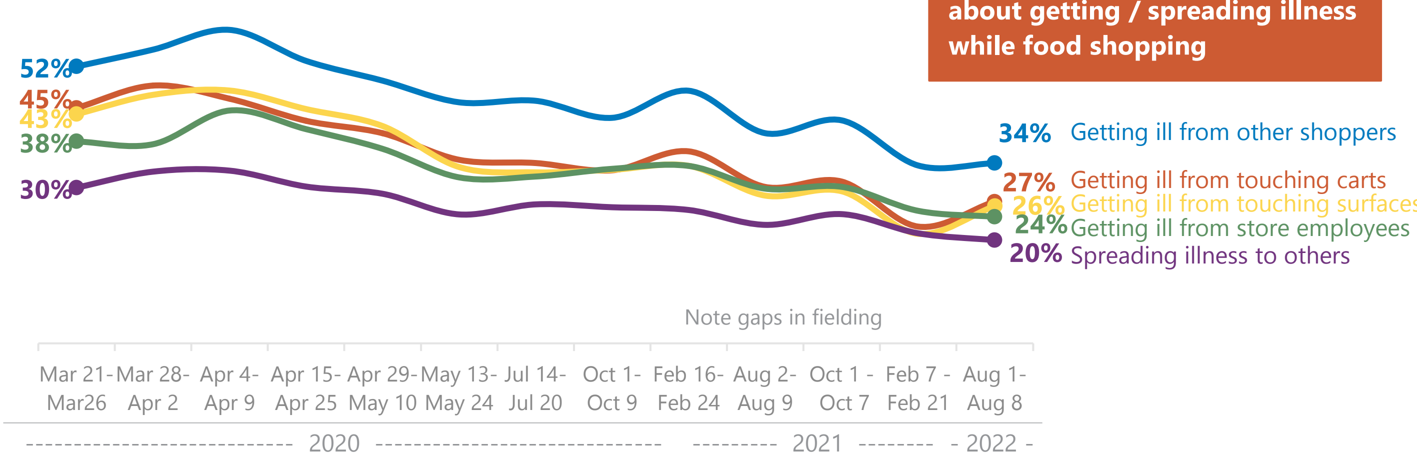
Among those employed, 22% changed where they work and 24% changed careers – net any change is 36%

Changes in shopping may stem from shoppers' health concerns with obtaining food. Despite returning comfort with grocery shopping in person, just over half (55%) of shoppers are concerned with getting/spreading illness while procuring food. Some of this comes from interaction with others, but concern about touching surfaces and shopping carts has trended upward vs. February. This change is driven by younger consumers, where 36% of Gen Z and 32% of Millennials note concern with touching surfaces and 32%/30% with touching carts. Visible reinforcement of safety protocols (e.g., cart sanitation stations, signage) may become baseline expectations for retailers.

CHART 4: CONCERN ABOUT ILLNESS WHEN OBTAINING FOOD

Among all shoppers

55% cite at least one concern about getting / spreading illness while food shopping



Source: FMI U.S. Grocery Shopper Tracker Aug 2022 and Trends and Trackers 2020-2022 Q. "When you obtain food for your home nowadays, which of these would you say you are especially concerned about?" Individual waves total n=1,027/1,036/1,033/1,027/1,020/1,024/1,035/1,022/1,001/2,056/1,617/1,601/2,091/1,490; Q. Which areas of your life do you expect will have PERMANENTLY changed in the past year? (Select all that apply) n=1,490; Q. In general, when thinking about your food choices, how much effort do you put into selecting nutritious and healthy options? n=1,490

Shoppers in pursuit of health and financial well-being find support in their communities, express wariness of government and large companies

Shoppers largely believe that family and friends support both their health and financial well-being. But doctors, farmers, and their primary food store are also trusted allies in supporting both arenas and are seen as more trustworthy than food manufacturers, government institutions and fast-food enterprises.

Over the past six months, shoppers are reporting less neutrality than previously, with increased levels of trust and mistrust reported. This is shown by increases on both ends of the spectrum, more people seeing support from the various entities, and more seeing the various entities working against them.

CHART 17: WHEN IT COMES TO MY FINANCIAL WELL-BEING, THESE PEOPLE AND INSTITUTIONS ARE ON MY SIDE…*

Working against me		On my side
11%	My family	67%
10%	My friends	64%
15%	**My "primary" food store**	48%
12%	Farmers	46%
17%	Food stores in general	39%
15%	Local restaurants	38%
15%	Online-mostly grocery	35%
27%	Health insurance companies	35%
24%	Banks	31%
30%	State/local government	28%
25%	Fast food restaurants	28%
23%	Manufacturers/Food processors	27%
33%	Federal/national government	27%
32%	Credit card companies	24%
43%	The news media	23%
31%	Gas companies	21%

CHART 18: WHEN IT COMES TO HELPING ME STAY HEALTHY, THESE PEOPLE AND INSTITUTIONS ARE…

Significant Chg vs. Feb 2022	Working against me		On my side	Significant Chg vs. Feb. 2022
	10%	My family	70%	+4 pts
	10%	My friends	65%	+10 pts
	12%	Doctors	63%	
+4 pts	11%	Farmers	53%	
+3 pts	12%	**My "primary" food store**	52%	+6 pts
+4 pts	12%	Grocery store pharmacists	47%	
+6 pts	17%	Drugstores	43%	+5 pts
+5 pts	15%	Food stores in general	42%	+4 pts
+7 pts	23%	Health insurance companies	40%	
	14%	Local, independent restaurants	39%	
	11%	Online-mostly grocery providers	39%	+7 pts
+4 pts	12%	Registered dietitians	38%	-10 pts
+10 pts	27%	State/local government agencies	31%	
+11 pts	29%	Federal/national institutions or agencies	30%	
	22%	Manufacturers / Food processors	28%	
-8 pts	27%	Fast-food restaurants	28%	+4 pts
+8pts	31%	The news media	25%	

Source: FMI U.S. Grocery Shopper Trends, August 2022. Q: "When it comes to helping you stay healthy, which of these people and institutions would you say tend to be on your side (helping you), and which tend to be working against you (making it more difficult to stay healthy)? (Select one per institution)" Base: n=1,490. Q: When it comes to your financial well-being, helping you to save money or getting the most out of the money you have, which of these people and institutions would you say tend to be on your side (helping you), and which tend to be working against you (making it more difficult on you financially)? (Select one per institution)" Base: n=1,490.

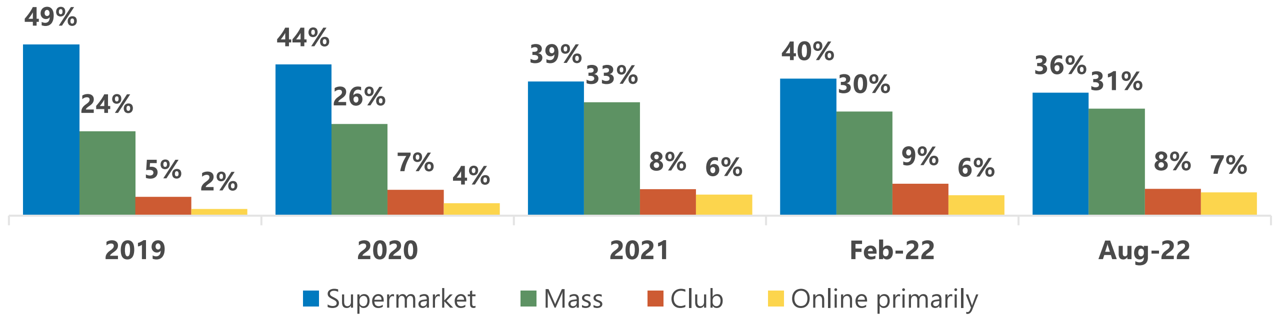
*New question, no trending available

Supermarkets continue to lose share as the primary food destination

The supermarket remains the most common primary store among American shoppers; however, it continues to lose share. Although only a small portion of shoppers (11%) reported switching channels to address rising prices, there has been some real impact. Online primarily continues to trend upward as a go-to grocery source, driven by those living in urban areas (14%), while growth in Mass's share is led by those in small town/rural areas (42%, up 5 pts vs. February). Supermarkets, however, maintain a strong lead in the suburbs (43%). As Mass is most available in rural areas and as populations shift, some of the decision for primary store might be attributed to store availability.

CHART 19: PRIMARY CHANNEL

Among all shoppers



Total online shopping is trending upward in terms of both the percent of the population shopping over the past year and as a percent of overall spend. Younger households, households with kids and upper-income households tend to spend the most online.

CHART 20: FREQUENCY OF ONLINE GROCERY SHOPPING

Among all shoppers

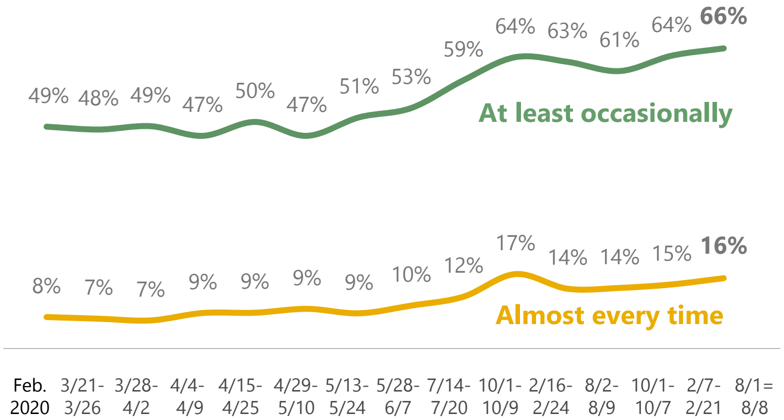
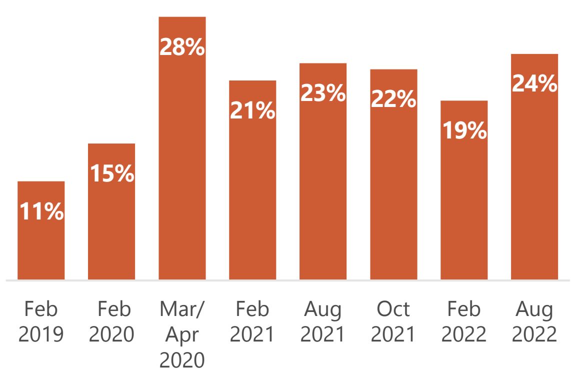


CHART 21: WEEKLY ONLINE GROCERY SPENDING AS A PORTION OF ALL GROCERY SPENDING

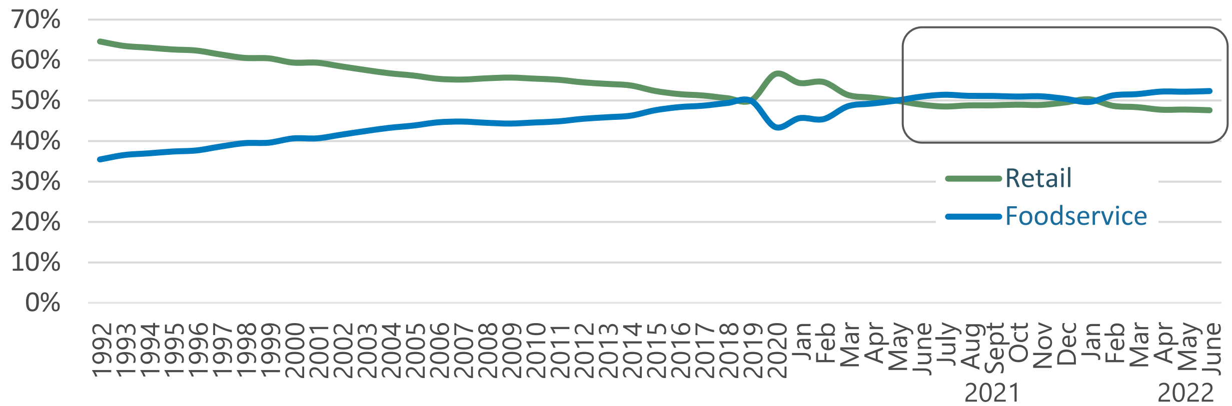


Source: FMI U.S. Grocery Shopper Tracker Aug 2022 and Trends and Trackers 2020-2022 Q: Which store or service do you consider your PRIMARY source of grocery-type items? In other words, where do you spend the most money on grocery-type items such as food, beverages, paper goods, health and beauty items, cleaning supplies, etc. for use in your home? (Please select one)" n=1,490; Q. "Thinking of the LAST MONTH, how often do you shop for grocery type items ONLINE, regardless of retailer, delivery method or order type? How much of this would you say your household has spent ONLINE for grocery type items in the past SEVEN DAYS? Individual waves total n= 1,027/1,036 /1,033/1,027/1,020/1,024/1,035/1,022/1,001/600; Q: "Thinking of the LAST MONTH, how often do you shop for grocery type items ONLINE, regardless of retailer, delivery method or order type? How much of this would you say your household spends ONLINE for grocery-type items each MONTH? Please record your response in whole dollars. Consider only grocery type items." n=2,056/1,617/1,601/2,091/1,490

Restaurants have regained their share of food spending, but pandemic and pricing dynamics promise future shifts

Restaurants had a rough ride during the first year of the COVID-19 pandemic, when sit-down dining was either prohibited or avoided, many restaurants closed either temporarily or permanently and those that remained sought to reshape their offerings to serve takeout-centric guests. Since then, consumer spending at foodservice has returned to pre-pandemic levels. Historically, restaurants had captured a progressively larger share of the average American's food dollar since the middle of the twentieth century, and following the pandemic's dramatic disruption of this trend, foodservice is once again outpacing retail in consumer dollars.

CHART 11: SHARE OF FOOD SPENDING FOR RETAIL AND FOODSERVICE, 1992–JUNE 2022



Given how smooth and steady long-term food trends have been, it is safe to say that today's status quo is not static at all. Inflation and supply chains are continuing to present American consumers with a shifting set of choices as they navigate the current economic environment. According to the U.S. Bureau of Labor Statistics:

- Seasonally adjusted food at home CPI is up 13.1% for the 12 months ending in June while food away from home is up 7.6% (not seasonally adjusted). The largest increases appear to come from cereals and bakery (15%), dairy and related (14.9%) and fruits and vegetables (9.4%).*

And as noted earlier in this report, competing considerations remain in play for shoppers:

- Shoppers have noticed rising food prices, especially in fresh categories.
- When it comes to COVID-19 risks, Americans are now far more comfortable dining indoors at restaurants (63%, up 13 pts since February). Shoppers are more comfortable shopping in stores than dining out and more comfortable shopping in stores than earlier this year.
- Stores continue to be perceived as a place to get healthy food, and shoppers concerned with the pandemic say they are trying to eat healthfully. Fast-food restaurants are especially unlikely to be seen as supporting the shopper in their health objectives.
- Shoppers found it challenging to track their food spending but have taken steps to reign it in by changing what they shop for and how. If and when inflation abates, many of these behaviors are likely to shift once again.

Source: U.S. Census Bureau, Advance Monthly Sales for Retail and Foodservices, Seasonally Adjusted
Note: US Census Bureau numbers have been updated since the Food Shopping Trends report May 2022
*https://www.bls.gov/news.release/cpi.nr0.htm

Appendix

Methodology

METHODOLOGY

Data used for this report was captured August 1-8, 2022, online among a national sample of 1,490 grocery shoppers.

Trended data is sourced from the *U.S. Grocery Shopper Trends 2020, 2021, and 2022* studies (February 2022 n=2,091, February 2021 n=2,056, February 2020 n=2,798). Additional data used comes from the *U.S. Grocery Shopper Trends* and *COVID-19 Tracker* fielded in August 2021 (August 2–8 n=1,617), October (1–7 n=1,601) and in nine waves in 2020 among a national sample, including 1,027 adults in Wave 1 (March 21–26), 1,036 in Wave 2 (March 28–April 2), 1,033 in Wave 3 (April 4–9), 1,027 in Wave 4 (April 15–25), 1,020 in Wave 5 (April 29–May 10), 1,024 in Wave 6 (May 13–24), 1,035 in Wave 7 (May 28–June 7), 1,022 in Wave 8 (July 14–July 20), 1,001 in Wave 9 (October 1–9).

Each wave and annual report was recruited from research panels and weighted as needed to align with U.S. Census on key demographic distributions.

	2022:	February	August
Gender	Male	**50%**	**47%**
	Female	**50%**	**53%**
Age	Gen Z (18-25)	**11%**	**12%**
	Millennial (26-41)	**28%**	**29%**
	Gen X (42-57)	**25%**	**23%**
	Boomer (58-76)	**31%**	**36%**
	Silent/Mature (77+)	**4%**	
U.S. region	East	**17%**	**18%**
	South	**38%**	**40%**
	Midwest	**20%**	**19%**
	West	**25%**	**24%**
	n =	**2,091**	**1,490**

		February	August
Household structure	Single-person household	**27%**	**28%**
	Multi-person household, kids present	**31%**	**32%**
	Multi-person household, adults only	**42%**	**40%**
Household income in 2021	Less than $15,000	**7%**	**7%**
	$15,000 to less than $35,000	**14%**	**15%**
	$35,000 to less than $50,000	**13%**	**13%**
	$50,000 to less than $100,000	**33%**	**33%**
	$100,000 or more	**31%**	**30%**
Race/ Ethnicity	Caucasian (only)	**62%**	**64%**
	Black/African-American	**14%**	**16%**
	Hispanic	**17%**	**12%**
	Other	**7%**	**8%**

Percentages may not add up to 100% because of rounding.

According to the conventions of probability sampling, the complete sample for this wave of research enables estimates with a sampling error of ±3% at the 95% confidence level.

ADDITIONAL READING

U.S. Grocery Shopper Trends 2022

- Shopper Landscape – April
- Shopping Trends 2022 – May
- Navigating a Hybrid World – June
- Future Outlook – June

U.S. Grocery Shopper Trends 2021: February 2021

- Report Trends Tracker: August 2021
- Report Trends Tracker: October 2021

FUTURE READING

Report Trends Tracker: Holidays – October 2022

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