



The State of Grocery Report 2025

Flipp Proprietary Market Research

Flipp Confidential



About this report

Flipp's annual Grocery Report provides an assessment of how American shoppers approach their planning and purchase decisions for groceries and household essentials.

We surveyed 3,000 household shoppers, who indicated that they are the primary decision maker for household shopping or equally share with another person. We partnered with Angus Reid Forum to distribute the survey and ensure a balanced and weighted sample according to the latest census data. Data was collected between May 1-6 2025.

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Key Insights | How Pre-Trip Planning and Price Visibility Are Shaping Store Choice

01 Pre-Trip Planning is a Consistent and Strategic Habit Among U.S. Shoppers

Planning remains a foundational behavior in American grocery shopping, with 88% of shoppers saying they plan their trips and 78% looking for savings and deals before they shop. This habit is not a temporary response to inflation - it's a sustained strategy embedded in how Americans approach grocery missions. The majority of shoppers write shopping lists (64%), check the prices for items they need (74%) and regularly compare prices across stores (68%). This suggests that **planning is about more than just organization - it's about maximizing value, maintaining control over budgets, and adapting to price pressures.**

02 Shoppers Turn To Store-Owned Tools For The Information They Need During Planning

When planning their grocery shopping, the top information shoppers seek includes where they can get the most items on their list (32%) and good deals on specific items (30%), reinforcing that pre-shop savings content is a critical decision driver. To find this information, shoppers primarily use store-owned digital channels - including store apps (34%) and websites (32%) - but paper weekly ads (30%) remain an important part of the routine. This suggests that **shoppers value flexibility in how they engage with store content, blending digital and print formats to support their planning process.**

03 Price Visibility Is A Trigger For Store Choice

Nearly three-quarters of U.S. shoppers (73%) say they would switch stores if they spotted a great deal on a key item during planning, and 41% say that the prices they uncover in the planning phase directly influence where they choose to shop each week. Yet, nearly half (48%) say they don't actually know where their top-value item is on sale in a given week. This reveals a powerful gap between shopper intent and access to price information - a missed opportunity for retailers to win trips by highlighting *relevant* information to shoppers when they are planning their shopping trips. In a market where price perception is driving behaviour more than ever, **surfacing deals on key value items could be the single most effective lever for influencing store choice.**

94%

Of household shoppers say it is important to them to find savings and deals for their grocery shopping

Pre-Trip Planning

89%

NET

Take pre-trip actions to manage their grocery bill

Choosing Where To Shop

71%

NET

Say that considering where to shop helps them manage their bill

In-Store Decision Making

89%

NET

Focus on in-store decisions to save money



Section 1

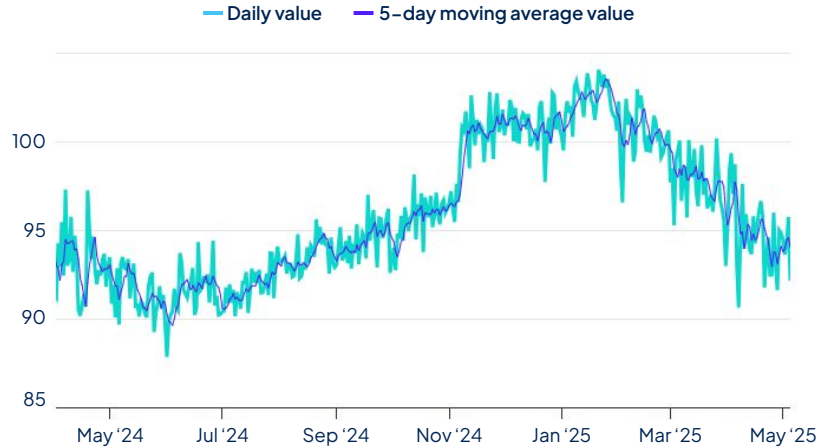
The Cost Of Groceries

Price Perceptions & Shopper Sentiment

U.S. Consumer Confidence Tracker: A Year of Recovery, Then Renewed Concern

SECONDARY DATA

In The Last Year: Sentiment over last year: May 2024 to May 2025



Between May 2024 and May 2025, consumer confidence in the USA has varied. After dipping to its lowest point in early summer 2024, confidence began climbing in August and accelerated sharply through November, peaking around January 2025. However, from February 2025 onward, confidence declined steadily, indicating **renewed consumer concern**.

In Context: Daily sentiment tracking, from 2018 to date



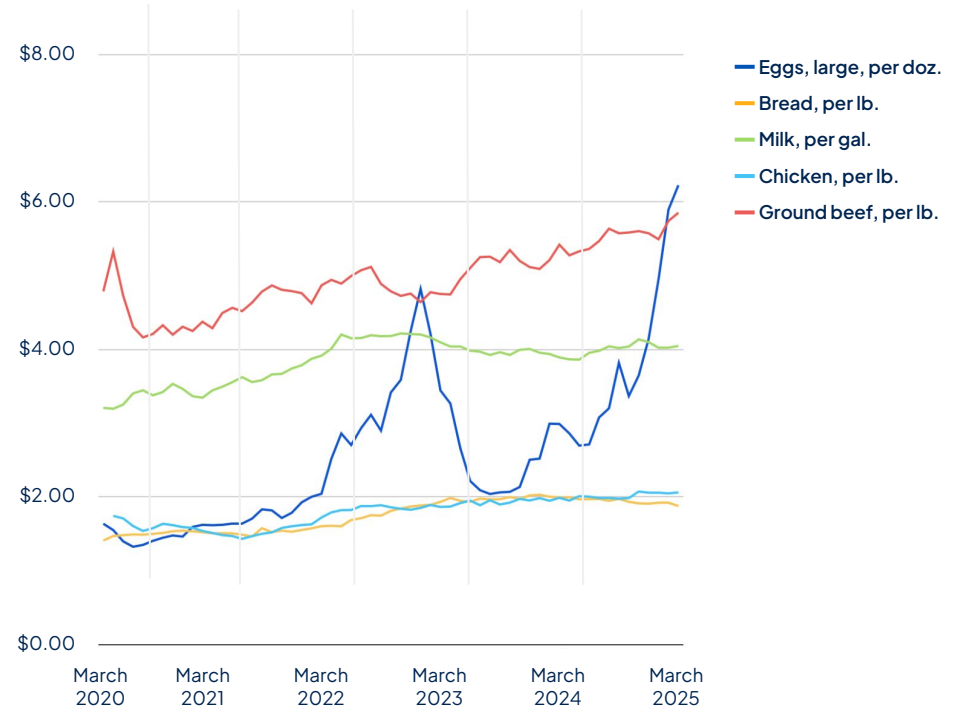
Over the past five years, Consumer Confidence has experienced sharp peaks and deep troughs driven by the pandemic, inflation pressures, and geopolitical uncertainty. Despite occasional rebounds, **confidence has yet to return to pre-2020 levels**.

Grocery Prices In USA

SECONDARY DATA U. S. Bureau of Labor Statistics

For the past four years of this report, we've consistently shown that shoppers remain concerned about the cost of their grocery shopping - and for good reason. Even with a solid economic recovery post-pandemic, **grocery prices have continued to rise steadily since 2020.**

And there's no sign of that changing; according to the USDA's April 2025 forecast, food-at-home prices are **expected to increase by 3.2%**, outpacing the historical average rate of growth.¹



¹USDA Food Price Outlook 2025
Figure: Data from U.S. Bureau of Labor Statistics

Weekly Grocery Bill

This is self-reported spend, not validated by any receipt data.



Shoppers that read digital weekly grocery ads spend more than shoppers that read print or do not read ads.

\$164

Read only mostly digital grocery weekly ads

\$162

Do not read weekly ads

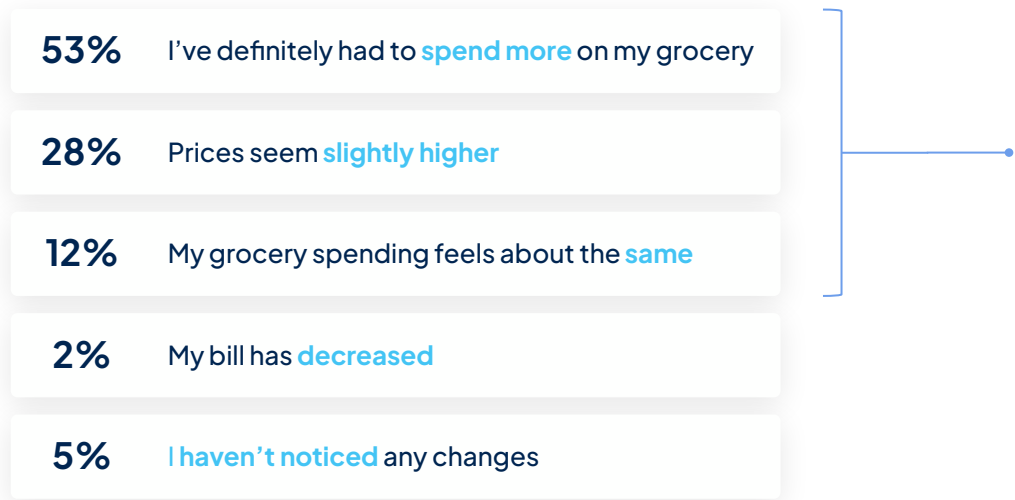
\$145

Read only or mostly print grocery weekly ads

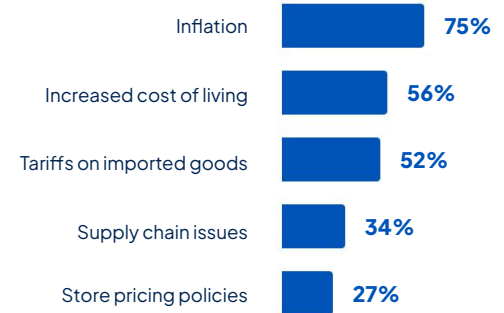
Perception of Grocery Bill

Over 80% of U.S. shoppers perceive that grocery prices have increased, with 53% saying they're definitely having to spend more. Shoppers most commonly attribute these increases to inflation (75%), followed by the rising cost of living (56%) and tariffs on imported goods (52%). This perceived pressure on household budgets is likely fueling strategic shopping behaviours such as planning, price comparison, and store switching.

Perception Of Recent Grocery Bills



Among shoppers perceiving higher prices What do you think is causing rising grocery prices?

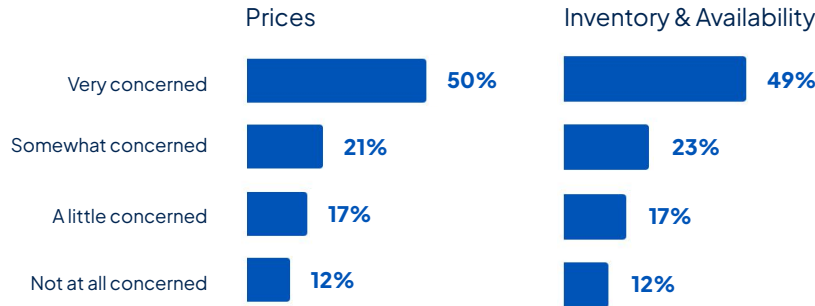


Tariffs

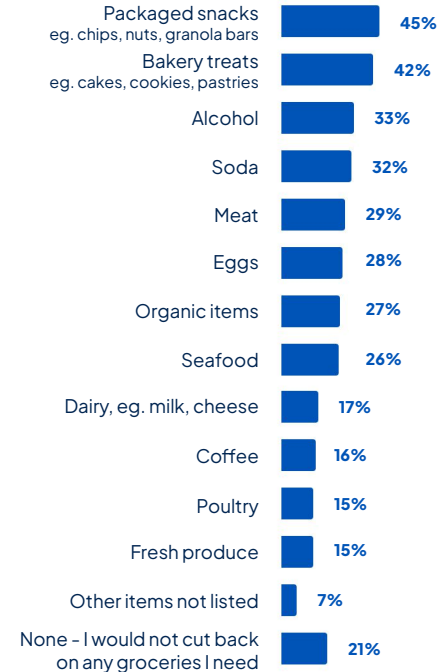
In 2025, headlines about tariffs on all kinds of consumer goods were everywhere (whether they were being rolled out or temporarily put on hold). As of May, the impact hadn't fully hit grocery stores yet, but the expectation is that prices are likely to rise.^{1 2 3}

At the time of the survey, **71% of American household shoppers said they were very or somewhat concerned about tariffs** driving up grocery costs. That worry extends beyond price: **72% also said they're concerned about tariffs affecting product availability on store shelves**. If prices were to rise, shoppers said they'd cut back mainly on non-essentials like packaged snacks, bakery treats, alcohol, and soda.

Level of Concern About Tariffs Impacting...



Items Shoppers Would Cut Back On If Prices Increased



Sources: [1 USA Today](#) [2 Forbes](#) [3 NPR](#)

How concerned are you - if at all - about tariffs on imported goods impacting your grocery shopping.

Are there any grocery items you would consider cutting back on - or have already cut back on - if prices were to increase?



Section 2

Pre-Trip Planning

Planning & Price Sensitivity: How Shoppers Decide What to Buy

Planning Grocery Shopping Summary



88%

Of household shoppers
say they plan their grocery
shopping

78%

Looks for savings & deals **before shopping**

73%

Would shop at a different store if they saw a great price
on a key item while planning

68%

Compare prices across stores

64%

Regularly write a **shopping list**

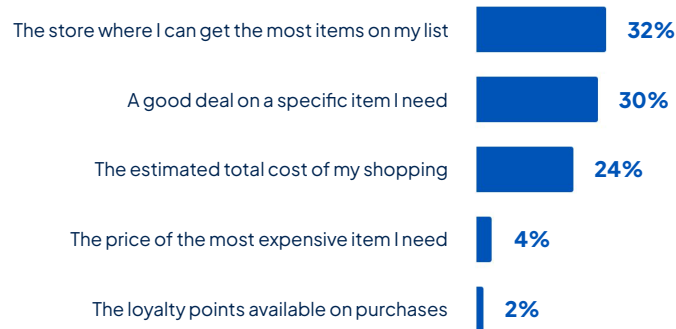
34%

Use a store app before going to the store

The Information Shoppers Are Seeking

When planning their grocery shopping, U.S. shoppers prioritize finding a store that covers most of their list (32%) and scoring deals on specific items (30%). To gather this information, store-owned and operated tools are most popular (store apps, 34%; store website, 32%) followed by paper weekly ads (30%). Well known to Flipp, adoption in the U.S. remains relatively low by comparison, but still leveraged by about 1-in-12 household shoppers surveyed here.

When you are planning your grocery shopping, what are you looking for:



Sources of Information



Checking and Comparing Prices

Checking prices before shopping remains a consistent habit for grocery shoppers: 78% of household shoppers say they seek out price information before they shop (unchanged from 2024), with 45% saying they check prices before most of their trips (down 7 percentage points from last year). This behaviour includes looking up the price of a specific item on their list, comparing prices within a store, or checking across multiple stores.



17%
(+1 P.P.) I **always** look for savings + deals before shopping

61%
(-1 P.P.) I **sometimes** look for savings + deals before shopping

22%
= I **do not** look for savings + deals before shopping

Among all shoppers:

74% Of shoppers check the price for a **specific item** they want to buy
(Often or Sometimes)

72% Of shoppers compare prices for a **category** of product **at one store** e.g. the variety of cereal prices at the store
(Often or Sometimes)

68% Of shoppers compare prices **across stores**
(Often or Sometimes)



Section 3

Store Consideration

Where & Why Shoppers Choose to Shop

Choosing Where To Shop Summary



70%

Say that considering where to shop helps them manage their bill

95%

Consider 2 or more stores when choosing where to shop

77%

Shop at 1-2 stores for everything they need

41%

Choose where to shop based on the prices they find while planning

28%

Say that shopping around helps them to save money on their groceries

10%

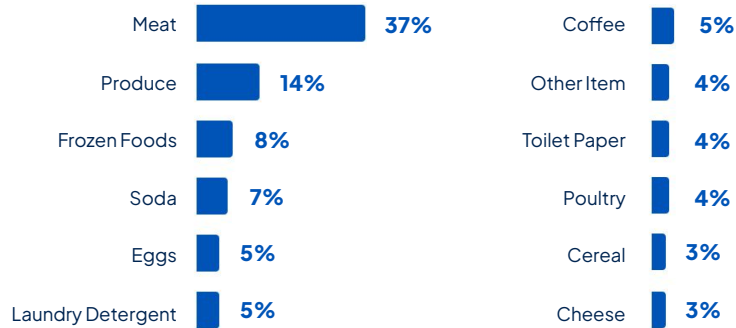
Switched to a new primary store in the last 6 months

The Key Value Item

Every shopper has an item they like to see on sale, with meat consistently the key item for shoppers in the U.S. But nearly half (48%) say they do not know where they can save money on their Key Value Item this week. And yet 73% said that they would shop at a different store if they found a great deal on the Key Value Item, highlighting the opportunity to influence shoppers with savings as they choose where to shop.

KEY VALUE ITEM

The item shoppers most like to see on sale



Say they would go to a store they don't normally shop at if they found a great deal on their KVI
(Extremely likely, Very likely, Likely)



Do not know the stores where their KVI is on sale this week



Believe they know where their KVI is on sale this week



Say they know the sales across multiple stores



Say they know their KVI is on sale at one store

Number of Trips / Baskets

U.S. shoppers make an average of 1.7 grocery trips per week, a figure that has remained stable since 2024. Most follow a consistent routine, with 36% shopping once a week and another 26% shopping twice a week.



1.7
Average number of grocery baskets per week
Including in-store and online shopping.
(No change vs 2024)

How often shoppers purchase groceries

Whether in-store or online



Stores Considered → Stores Visited

On average, the consideration set is narrowed down to less than a third of stores considered. U.S. shoppers now consider fewer stores on average (5.8, down from 6.7 in 2024), indicating a more focused selection process. Despite this, the number of stores actually visited remains steady at two, showing consistency in shopping routines.



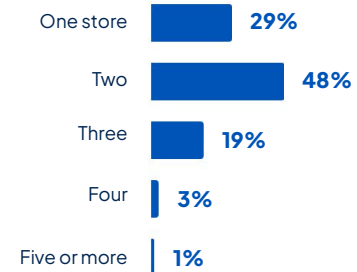
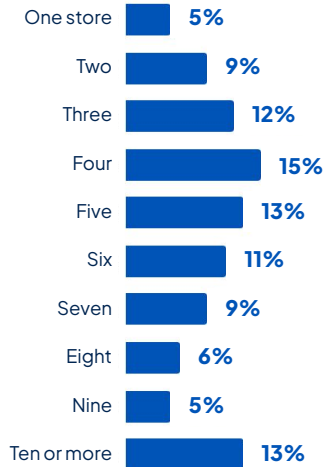
Average number of stores shoppers will consider

Consideration def.: Shopper may not shop there every week, but is an option they consider
(Down from 6.7 in 2024)



Average number of stores visited

(No notable change from 2.1 in 2024)



Factors Influencing the Store Choice Each Week

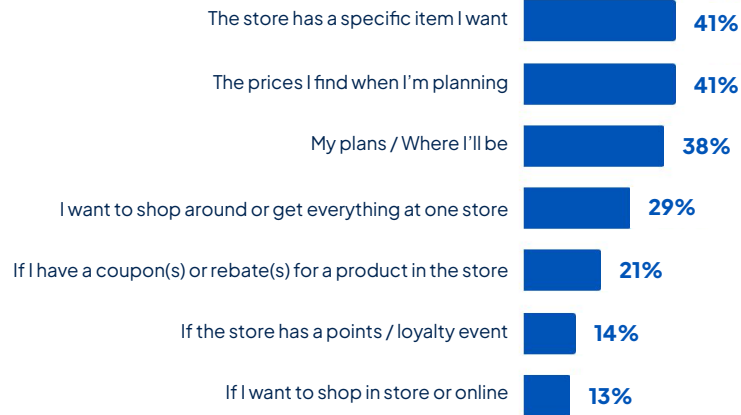
Shoppers' weekly store choice is most influenced by finding a specific item (41%) and the prices they uncover while planning (41%). These practical, value-driven factors outweigh convenience perks like loyalty points or shopping channel preference, highlighting that **product availability and price are the top drivers of store selection.**



Average number of stores shoppers will consider



What influences store choice each week?



Average number of stores visited to get all the groceries

Reason For Choosing Primary Store

U.S. grocery shoppers place a high priority on value for money when choosing their primary retailer. While convenience matters, cost is the dominant factor in securing loyalty.

Main Reason For Choosing Primary Retailer



Top 5 Retailers That Are Chosen For “Best Value For Money”

U.S.	Northeast	Southeast	Southwest	Midwest	West
Walmart	Walmart	Walmart	Walmart	Walmart	Aldi
Aldi	Aldi	Aldi	H-E-B	Costco	Walmart
Kroger	ShopRite	Kroger	WinCo	WinCo	Kroger
Costco	Costco	Food Lion	Aldi	Grocery Outlet	Meijer
Publix	Stop & Shop	Costco	Kroger	Safeway	Costco

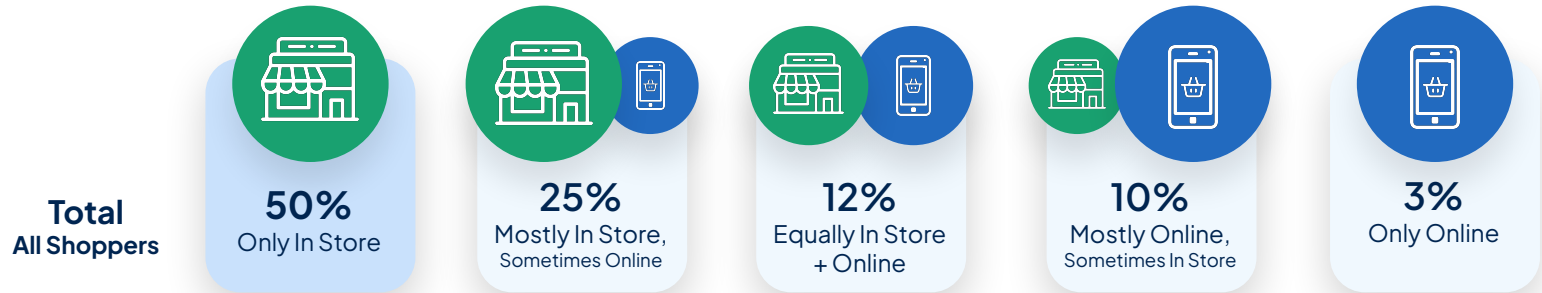


Section 4

Choosing Where To Shop: In-Store vs Online

Channels

In the U.S., in-store shopping continues to be the preferred channel for shoppers, with 78% shopping Only or Mostly In Stores (-4 percentage points vs. 2024). American shoppers are very comfortable ordering online: 50% of shoppers say they will order groceries online (any frequency), an increase of 7 percentage points from last year, and 17 points since 2023. Though for most, this is supplementary to in-store purchases.



97% shop in stores (any frequency)

50% order groceries online (any frequency)

Channels Online Shopping x Generation

There is a generational shift toward more hybrid shopping behaviours among younger consumers, with the majority of Gen Z and Millennials mixing channels for their grocery shopping (Gen Z 53%; Millennials 55%). In contrast, the majority of Gen X and Boomers shop *only* in stores, and limited online adoption.

	In Store Only	Majority In Store, Sometimes Online	Equally In Store & Online	Majority Online, Sometimes In Store	Only Online
Total	50%	25%	12%	10%	3%
Gen Z	45%	27%	17%	9%	2%
Millennials	43%	29%	14%	12%	2%
Gen X	53%	25%	10%	9%	3%
Boomers	62%	19%	7%	8%	4%

Channels Online Shopping x Generation

Among U.S. shoppers who buy groceries online, retailer delivery (44%) and curbside pickup (44%) are the most commonly used channels, followed by third-party delivery services (36%). However, online grocery shoppers are not limited to a single method; many use a mix of channels. Generational patterns show that Millennials and Gen Z are more likely to use third-party services, while Gen X and Boomers tend to favor curbside and retailer delivery.

Online channels used among the 50% that shop online for groceries (any frequency)

	Delivery from retailer <i>e.g. Walmart, Kroger, Walmart+</i>	Curbside Pickup	Delivery service <i>e.g. Instacart, Doordash, Uber Eats</i>
Total All Online Shoppers	44%	44%	36%
Gen Z	45%	42%	41%
Millennials	41%	47%	43%
Gen X	47%	44%	30%
Boomers	44%	43%	24%



If you're interested in learning more about Flipp's first-party research and our complete retail merchandising platform, [please reach out to our team.](#)