DATALIVE 2.0

2025

WELCOME

datAlive.
FOOD AND BEVERAGE

FOOD

BEVERAGE

BUSINESS 4 MIN READ

Americans are worried about grocery prices again, and they're making changes

UPDATED AUG 8, 2025

By  Nathaniel Meyersohn

Grocery prices have jumped up, and there's no relief in sight

SEPTEMBER 19, 2025 · 5:30 AM ET

The cost of groceries in America rockets

Food-price inflation is nearly three times higher than pre-pandemic forecasts

BREAKING | BUSINESS

Almost 90% Of Americans Are Worried About The Cost Of Groceries

By Mary Whitfill Roeloffs, Forbes Staff. Mary Roeloffs is a Forbes breaking... Follow Author

Published Aug 04, 2025, 01:09pm EDT, Updated Aug 04, 2025, 01:40pm EDT

U.S. NEWS

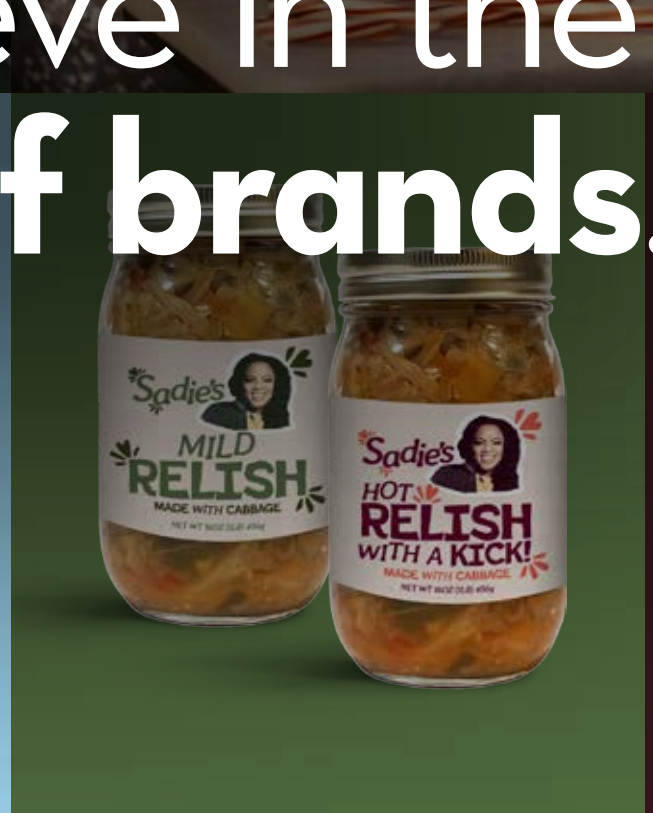
The vast majority of US adults are stressed about grocery costs, an AP-NORC poll finds

9 in 10 Americans Are Changing How They Shop for Groceries to Save Money – Even High Earners

Budget pressures are pushing shoppers to cut treats, switch brands, and rethink where they shop.

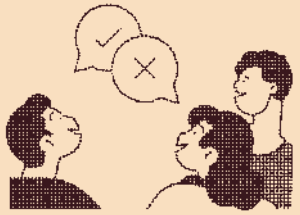
By Nicolette Baker Published on April 26, 2025

We believe in the **power of brands.**

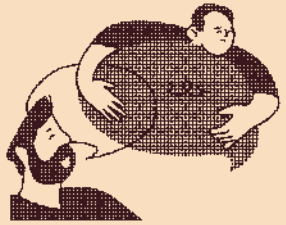


And believe in the **power of data**.

QUANTITATIVE RESEARCH



FOCUS GROUPS



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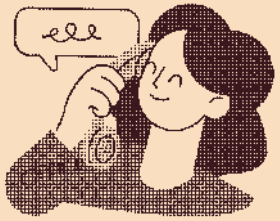
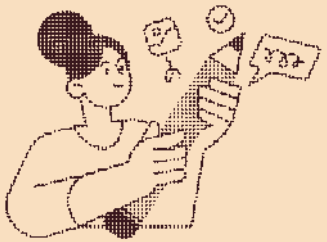


SOCIAL LISTENING



SYNDICATED RESEARCH

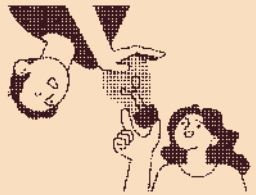
sample.
CONSUMER PANEL

PROPRIETARY CONSUMER PANEL

CONSUMER PORTAL

1.7K+

PARTICIPANTS



CONSUMER INSIGHTS

NATIONWIDE

PRIMARY RESEARCH

BEYOND SECURE

QUALITY ASSURANCE

INTRODUCING

datAlive.

FOOD AND BEVERAGE


WHAT DRIVES SWITCHING?
ARE STORE BRANDS A THREAT?
WILL THEY PAY MORE?
HOW CAN WE WIN THEM OVER?
FOODTOK???

10-minute survey. JUNE/JULY '25

400

RESPONDENTS AGED 18+

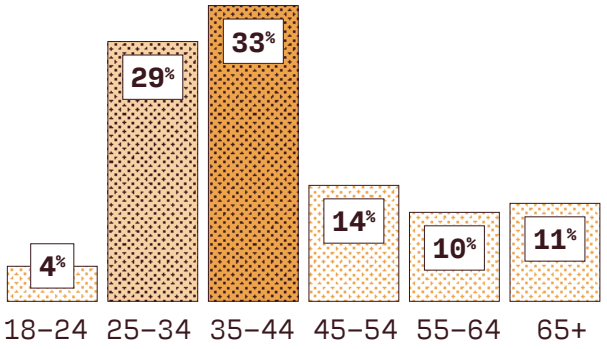
AT LEAST SOMEWHAT INVOLVED IN GROCERY SHOPPING

95%

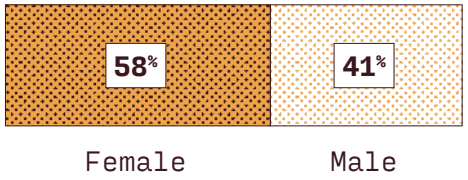
CONFIDENCE WITH +/−5% ERROR RATE

NEW YORK STATE

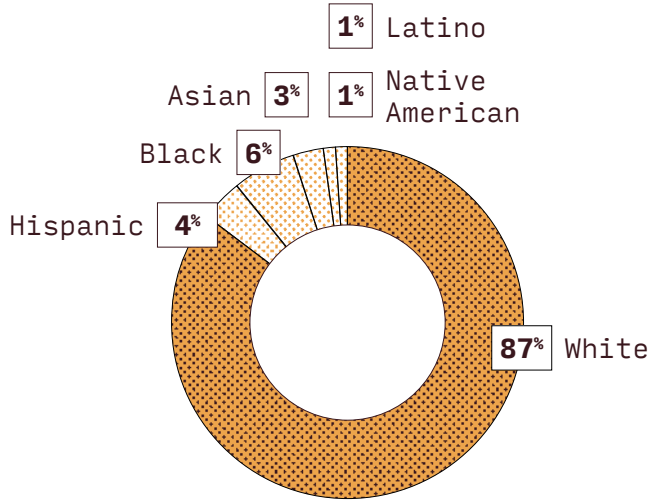
Our **shoppers.**



Age

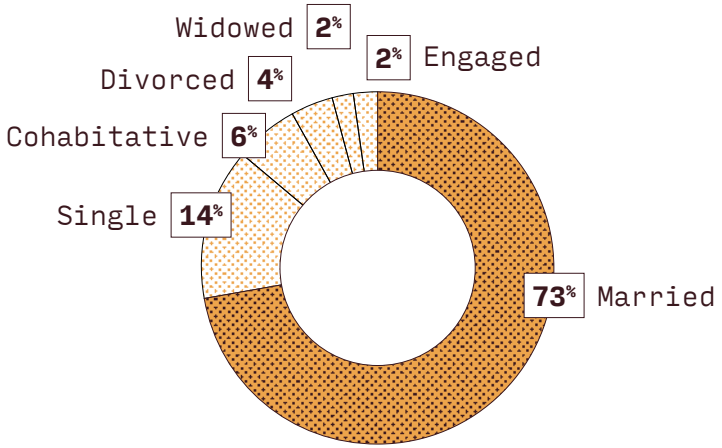


Gender

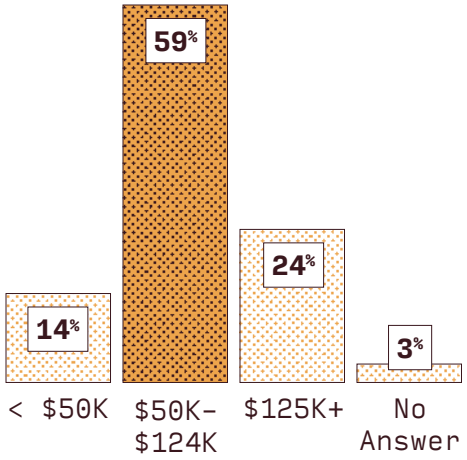


Race

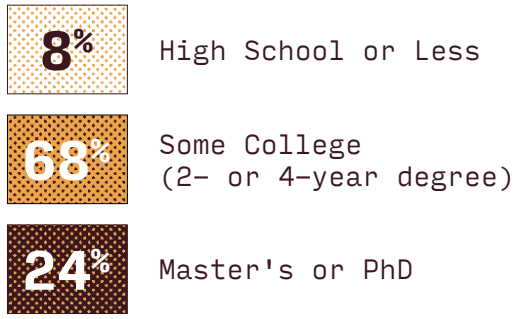
Marital Status



Household Income

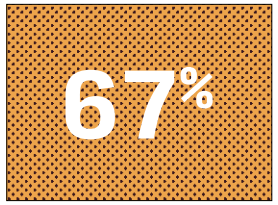


Education

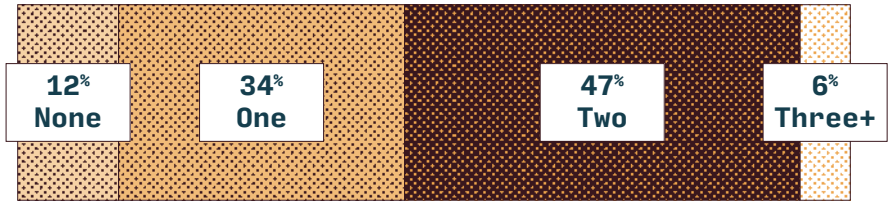


Purchasing for the **family.**

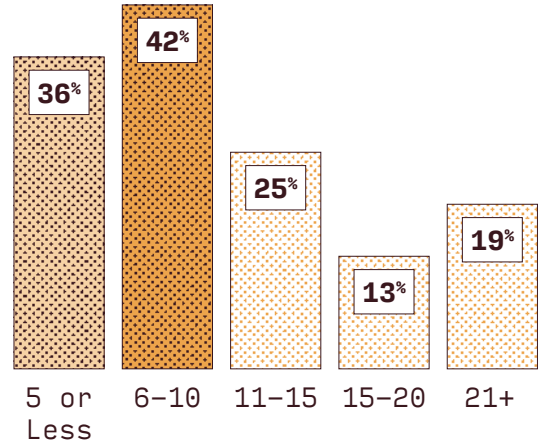
Children



Have Children

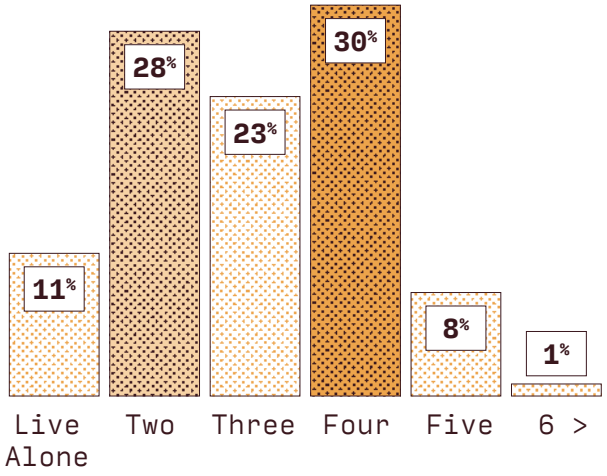


Number in House

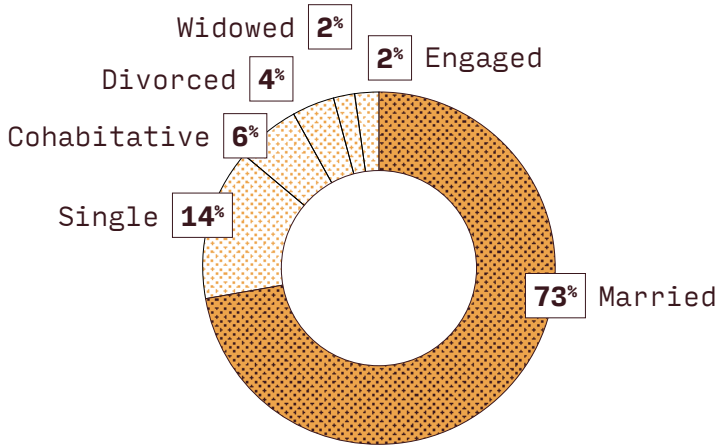


Age

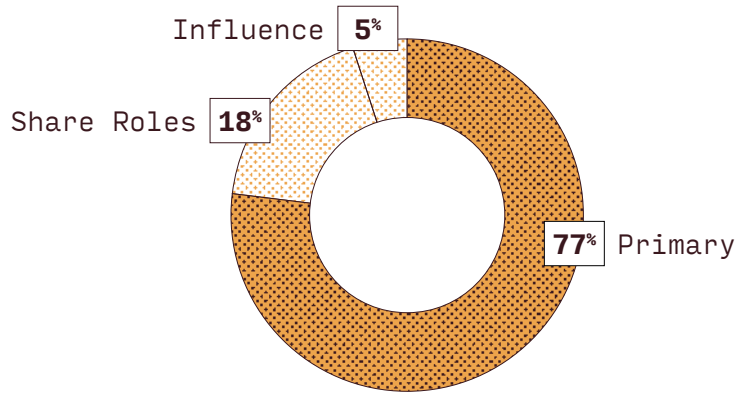
Household Size



Marital Status



Shopping Role



Where's the **register ringing**?

SHALL WE DINE?

UNPACKING

Brand loyalty lives in
unexpected spaces.

LOYALTY.

OUR HYPOTHESIS.

INFLATION AND ECONOMIC UNCERTAINTY HAVE PRICE CONSCIOUSNESS RISING.

OUR HYPOTHESIS.

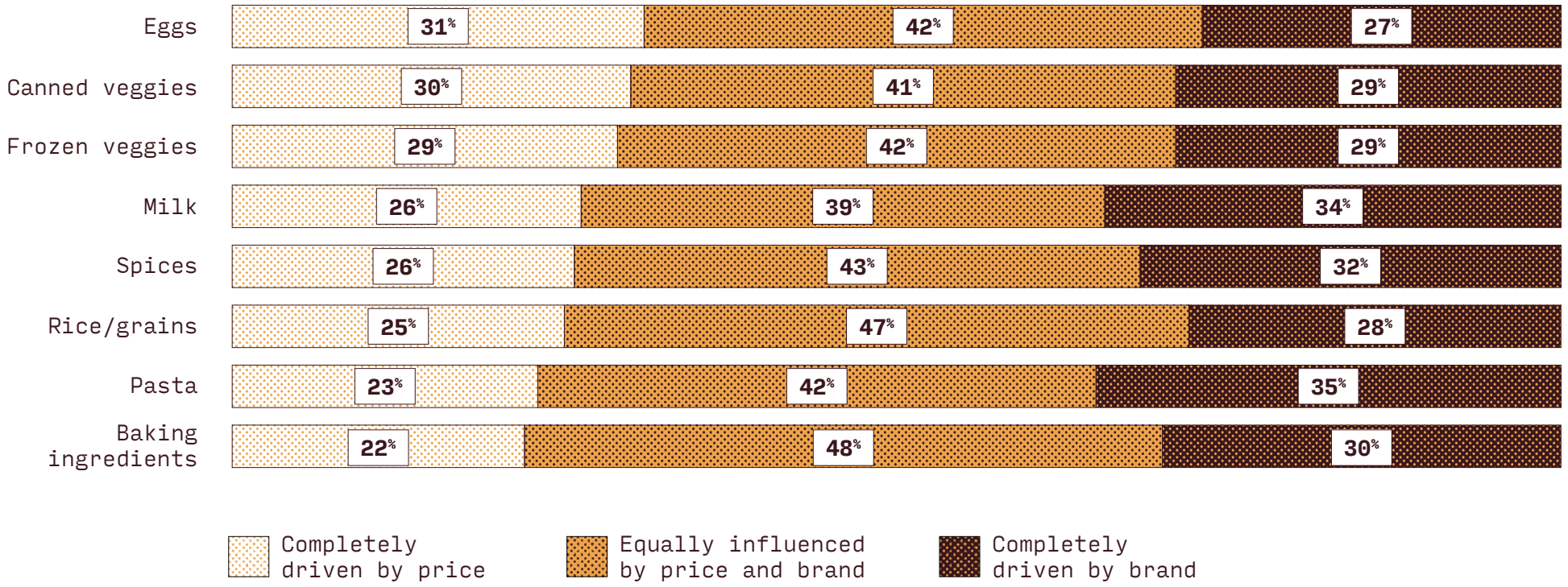
SO SHOPPERS WILL PRIORITIZE BRAND NAMES FOR SPECIAL OCCASIONS AND PURCHASE EVERYDAY ITEMS BASED ON PRICE.

THE REALITY.

YES, PRICE CONSCIOUSNESS IS RISING.

Price Consciousness

But, brand still carries more weight than price across almost all grocery categories.



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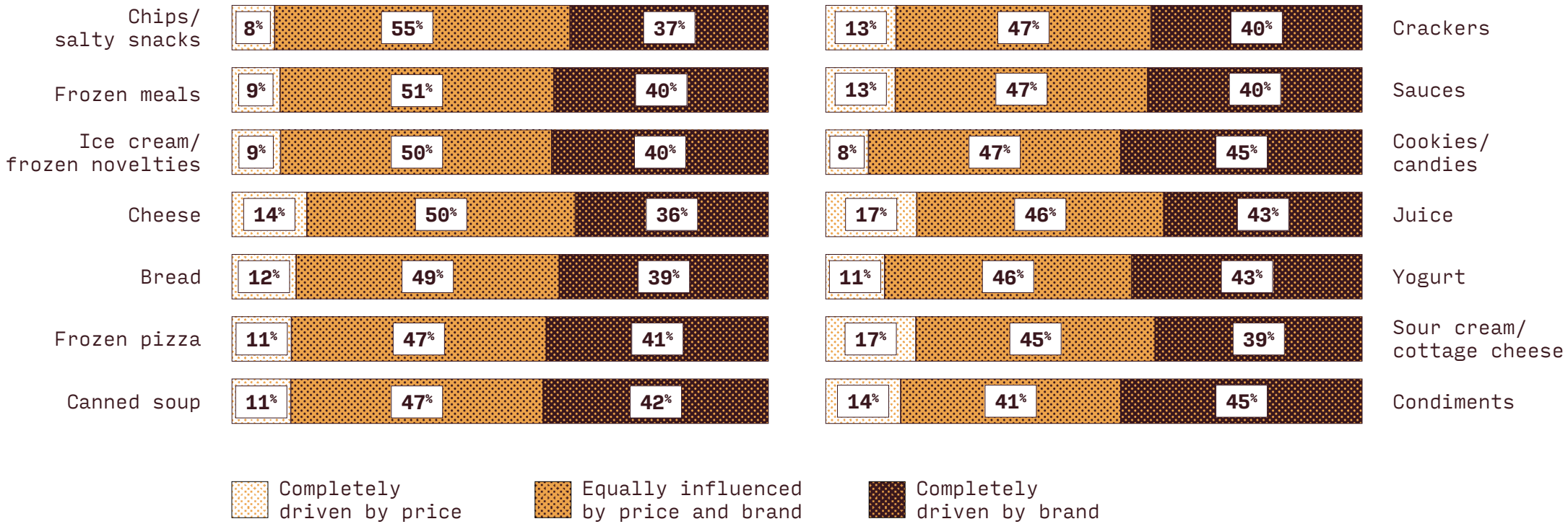
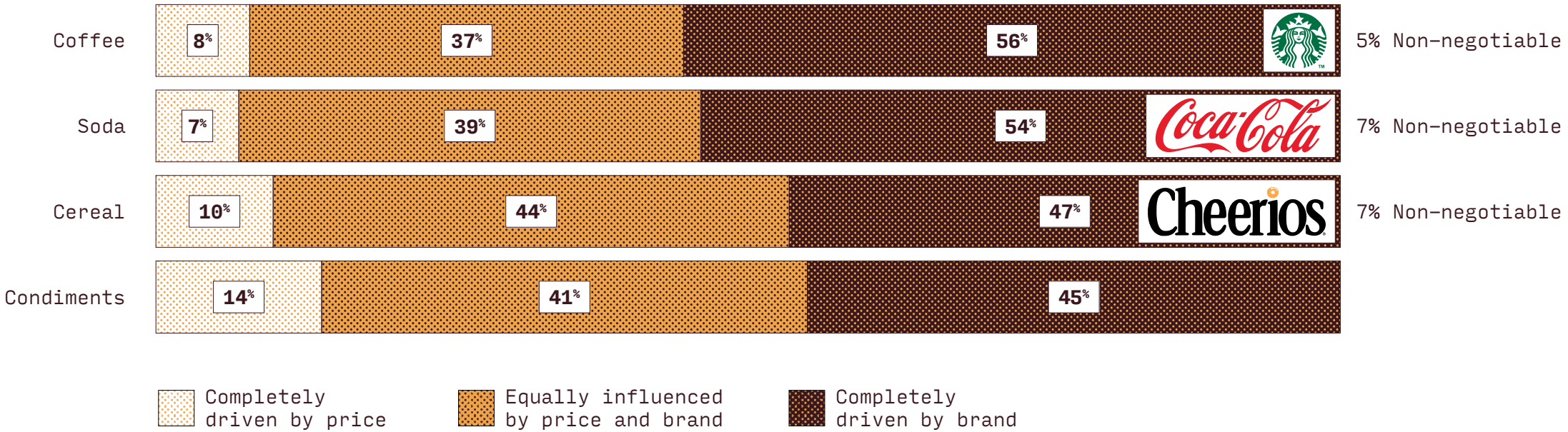


THE BIG WOW?

Brand preference is
ESPECIALLY notable in everyday items.

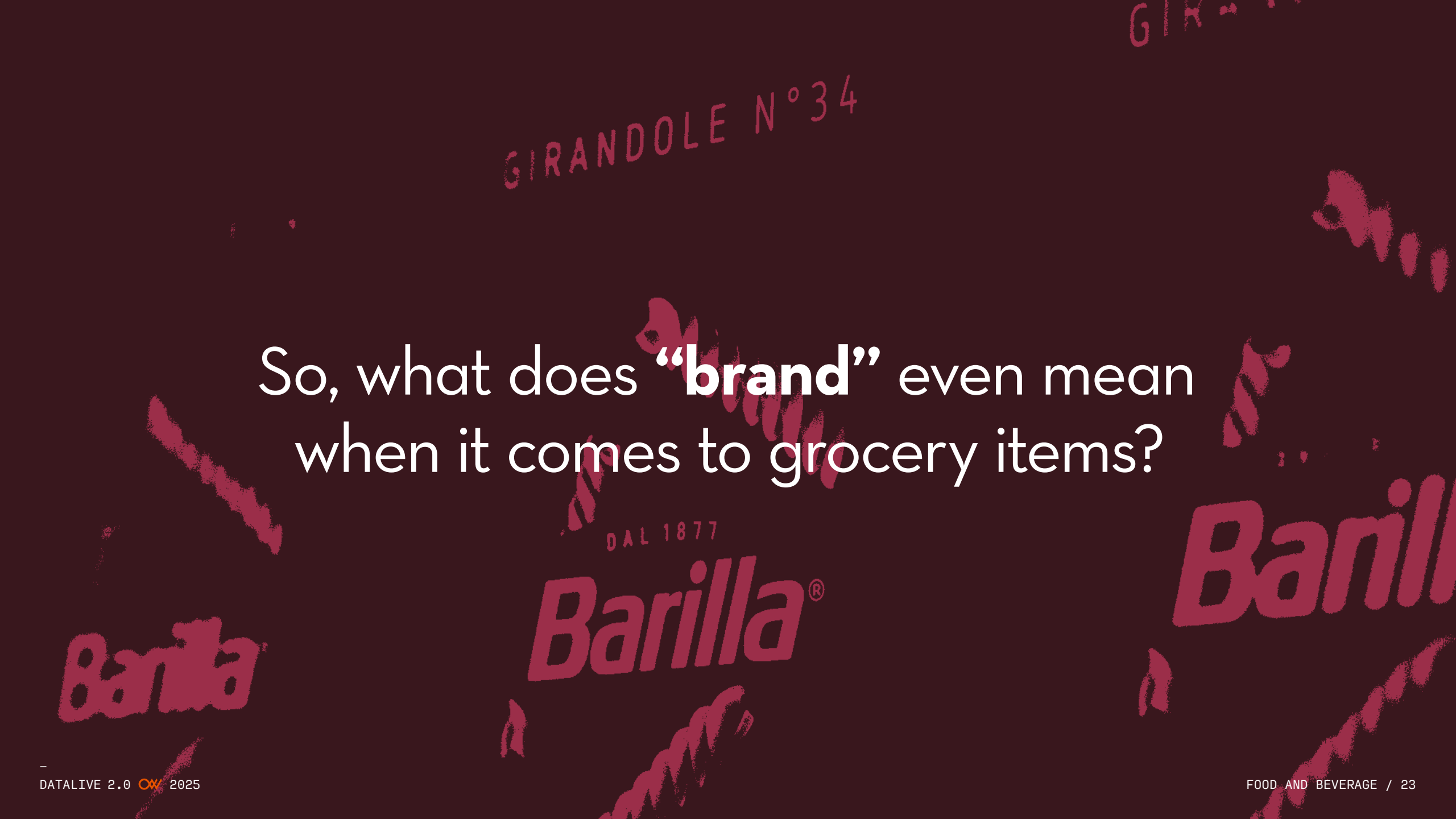
Shoppers are most loyal to brands in everyday categories like **coffee, soda, cereal, and condiments.**



Suggests shoppers don’t want to have to analyze every choice they make. Once they know and love a brand, auto-purchase is activated.

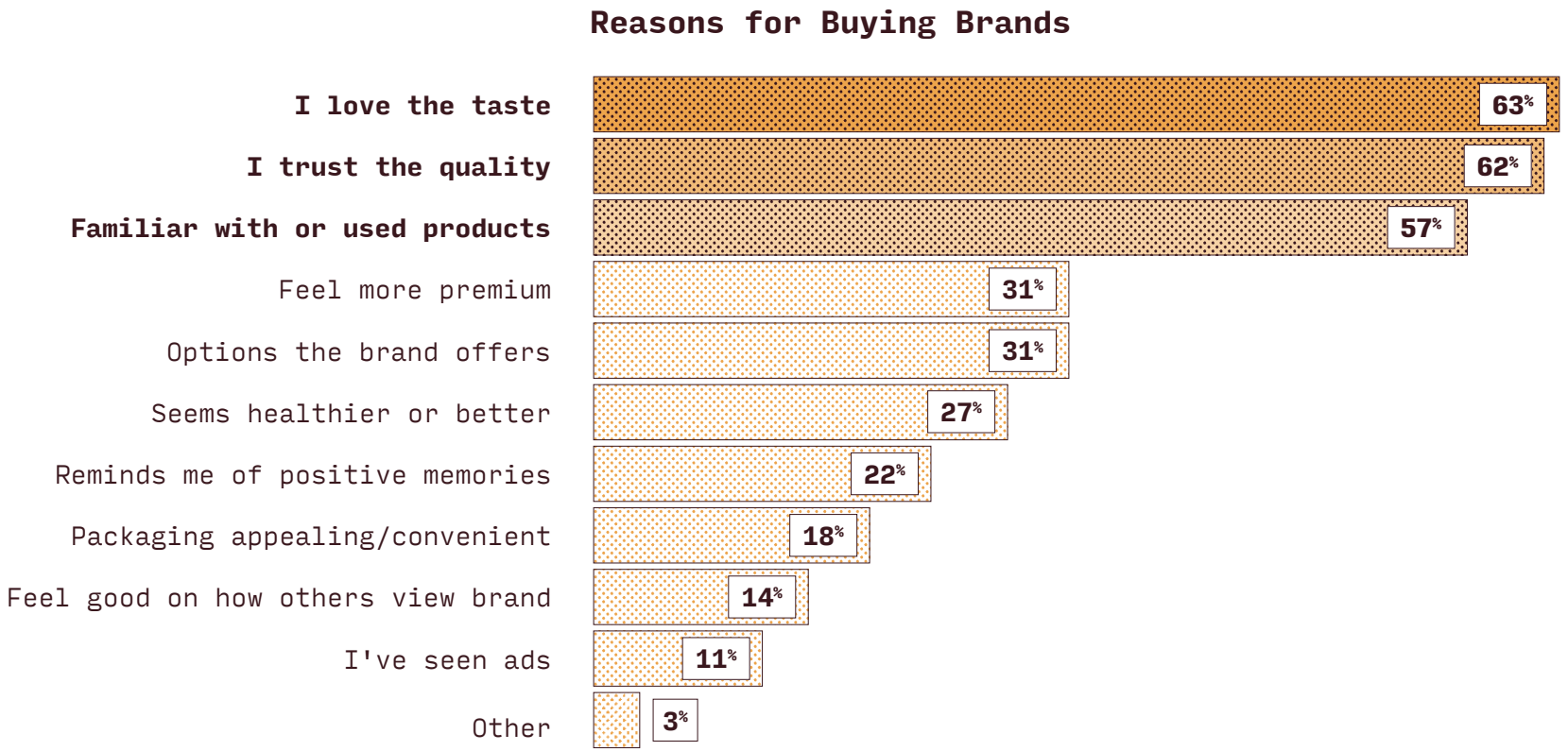
What gets them to this point of loyalty?

Branding in the grocery space is so **nuanced** compared with other categories.



So, what does **“brand”** even mean when it comes to grocery items?

First, let's unpack the **drivers behind name brand purchasing.**



Why are these aspects so **important** to shoppers?

> “**I try to look for consistency.** I am price conscious, but I also want the food to taste the same from occasion to occasion.”

Why are these aspects so **important** to shoppers?

“**I try to look for consistency.** I am price conscious, but I also want the food to taste the same from occasion to occasion.”

“**Nutrition facts and reliability** are ultimately what makes me decide on a product.”

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“**I try to look for consistency.** I am price conscious, but I also want the food to taste the same from occasion to occasion.”

“**Nutrition facts and reliability** are ultimately what makes me decide on a product.”

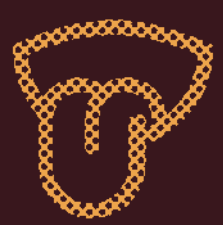
Why are these aspects so **important** to shoppers?

"**Name brands have something that sets their quality apart from other options.**”

Brand stands for an **EXPECTATION** of a certain taste, texture, quality, or nutritional value.

WHAT DOES THIS MEAN FOR BRAND MANAGERS?

A brand trying to gain loyalty?



Taste

Trust in quality

Familiarity

The top three drivers for brand choice all suggest that the shopper has had experience with the brand.

SO, HELP THEM EXPERIENCE YOUR BRAND!

Get your product in their hands in a positive – and shareable – way.


KIND
FRUIT & NUT
ALMOND & APRICOT
KIND
FRUIT & NUT
ALMOND & APRICOT

A brand that already has **loyalty**?

Don’t get **lazy**!

Maintain product quality, and **innovate when necessary**.

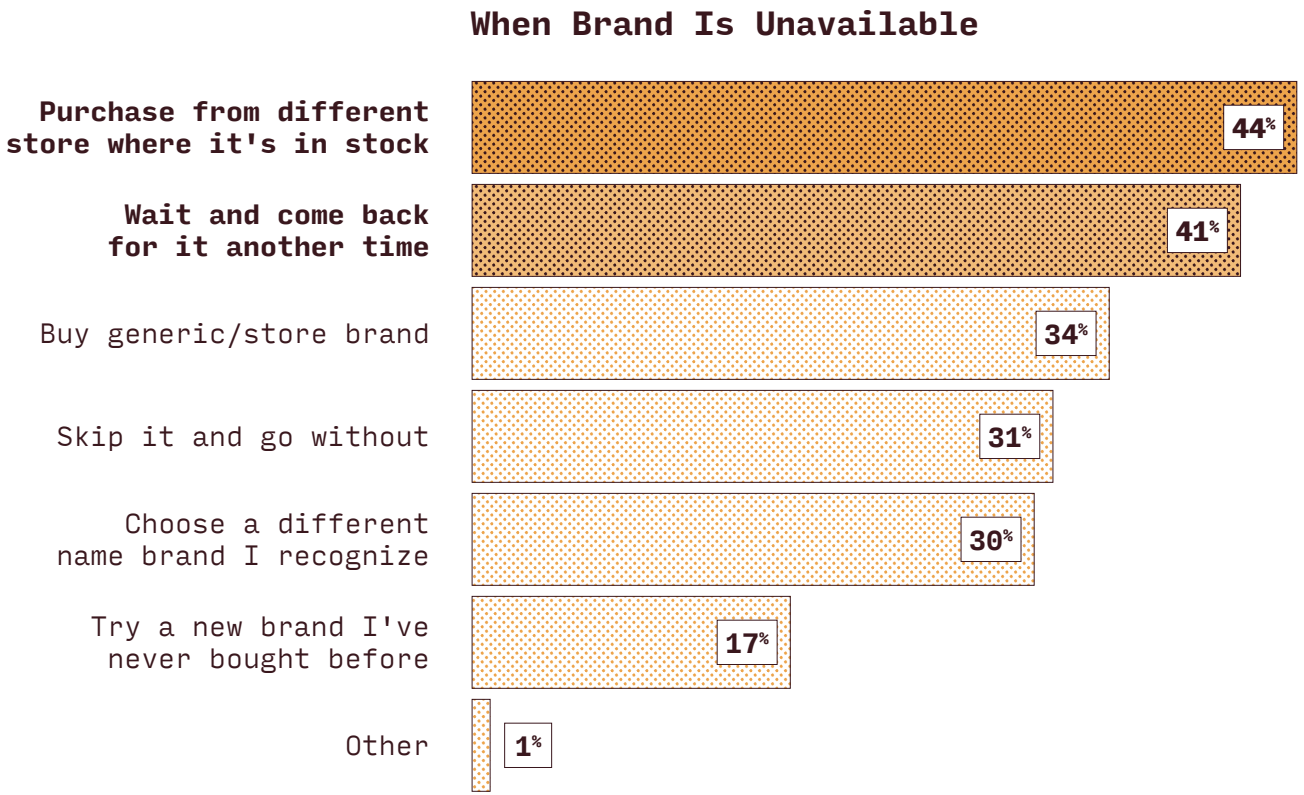
A brand that already has **loyalty**?

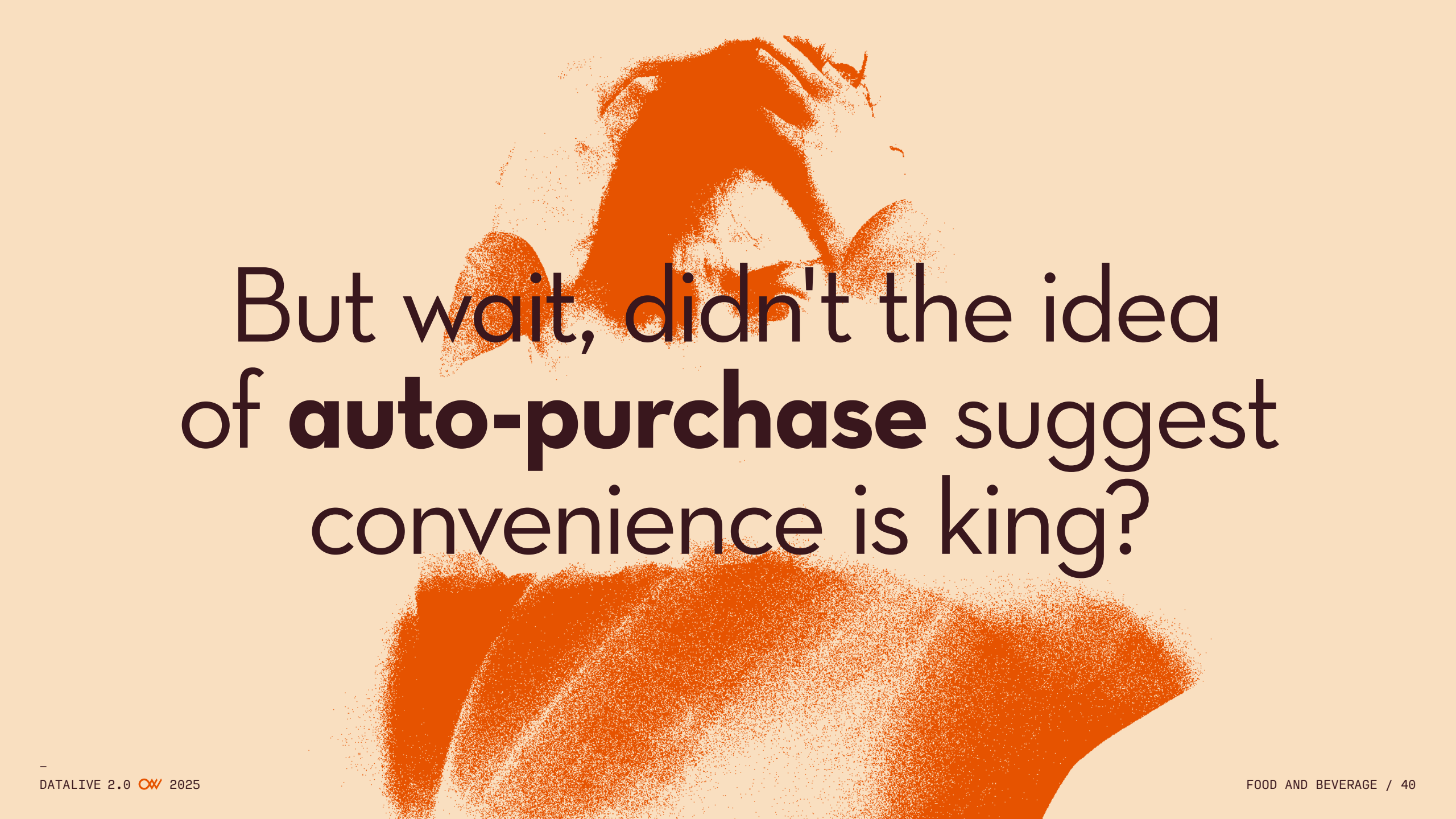
Remind consumers why they **love you and build community**.


amazon
Shipt
DON'T GIVE SHOPPERS A REASON TO GO ELSEWHERE.
instacart


SPEAKING OF SUBSTITUTING!
No dairy.
No nuts.
No gluten.
64 fl oz
(1/2 GAL)
(1.89L)

Shoppers **go the distance** for brands they love.



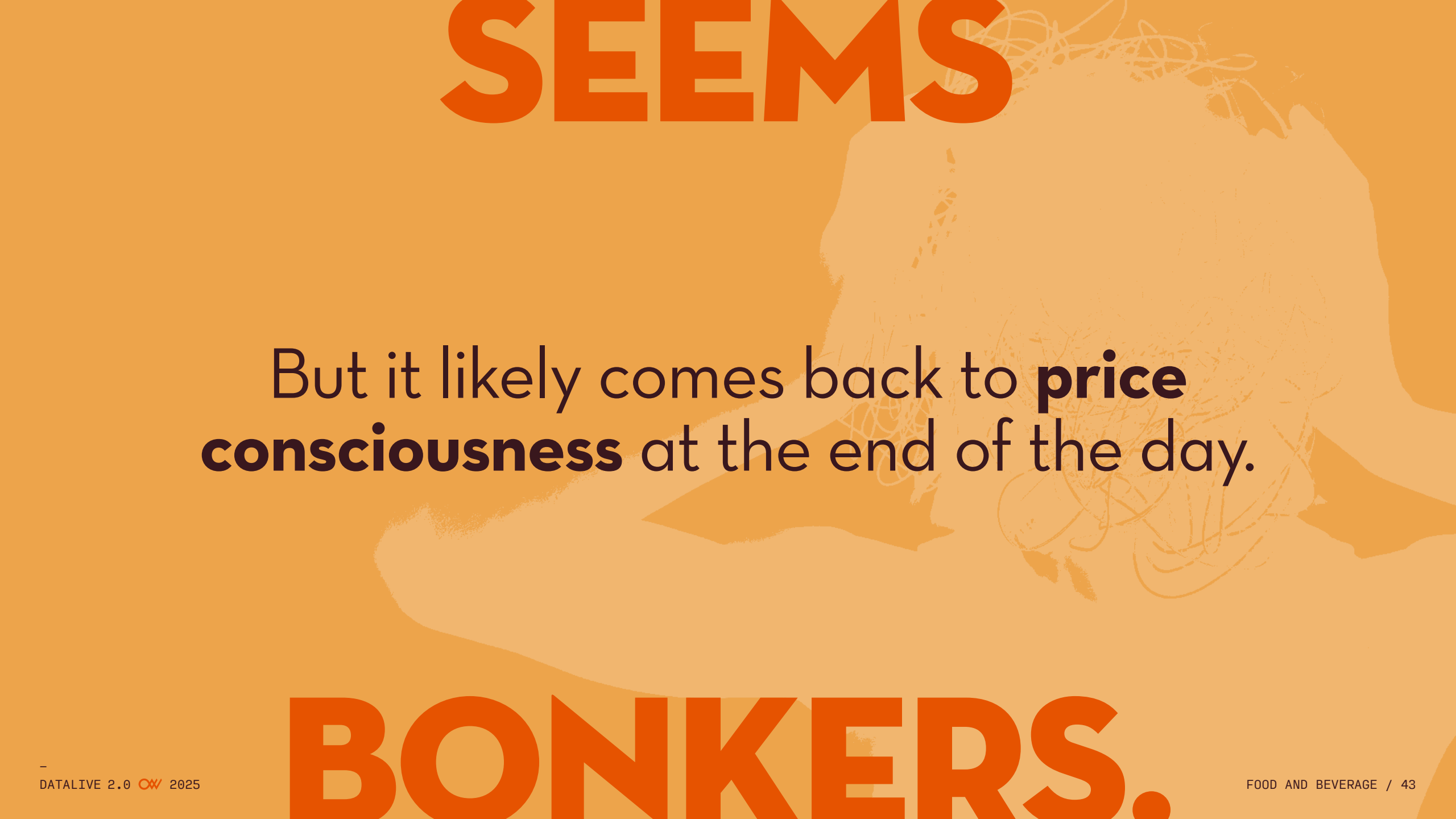


But wait, didn't the idea of **auto-purchase** suggest convenience is king?

Yet shoppers are **more likely** to go to another store or wait for a brand they love vs. buying a generic or alt brand?

SEEMS BONKERS.

SEEMS



But it likely comes back to **price consciousness** at the end of the day.

BONKERS.

SEEMS

“I’d rather **buy brand names I trust** and save money by not having to throw it out.”

BONKERS.

THERE'S A HIDDEN COST TO TRYING SOMETHING NEW.

THE FINANCIAL COST.

NEW PRODUCT $ + TRUSTED PRODUCT $
= MORE MONEY IN THE LONG RUN

THE TIME COST.

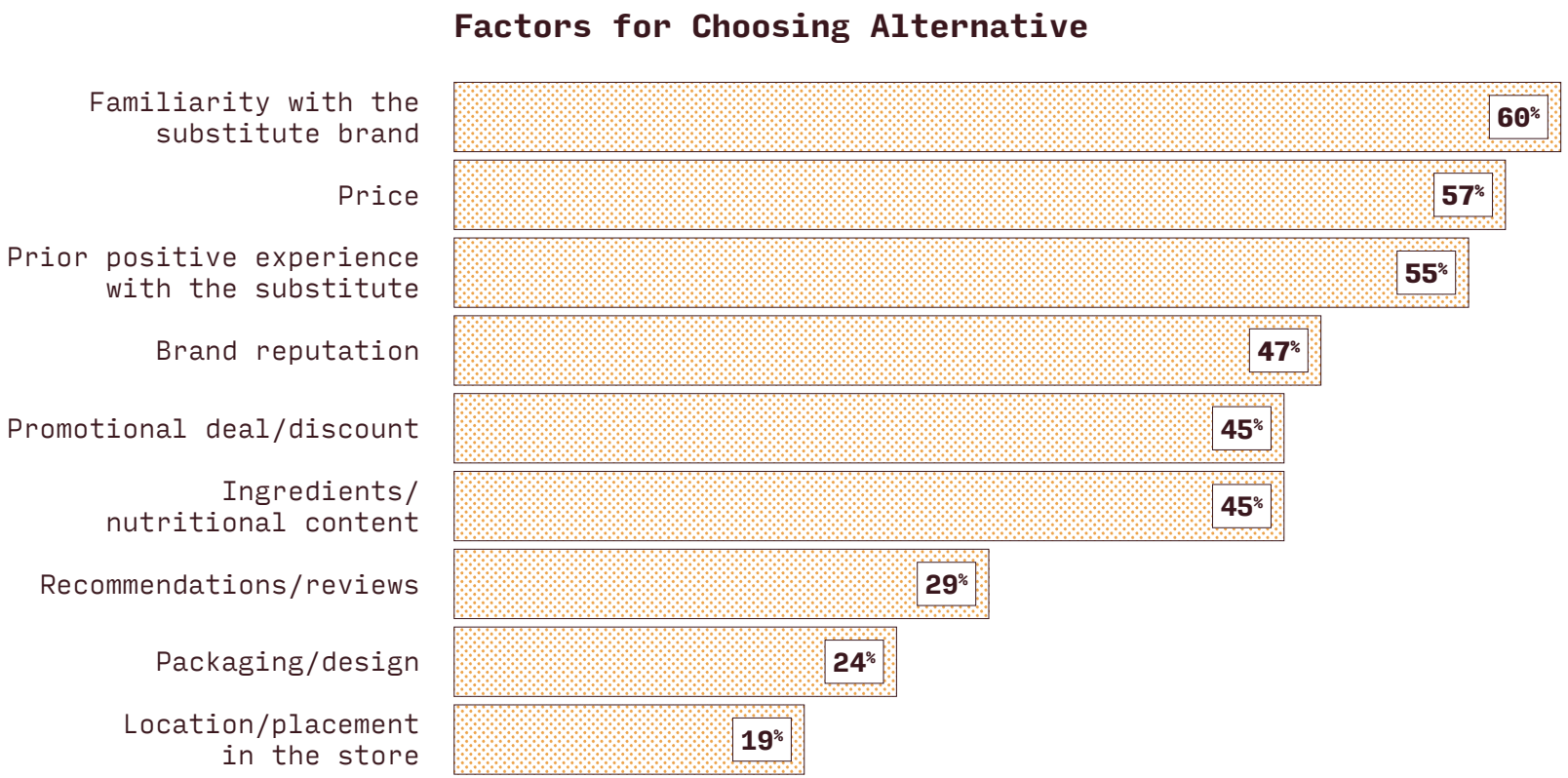
LOOKING FOR SOMETHING NEW
+ TRYING SOMETHING NEW
+ GOING BACK FOR OLD FAITHFUL

THE HAPPINESS COST.

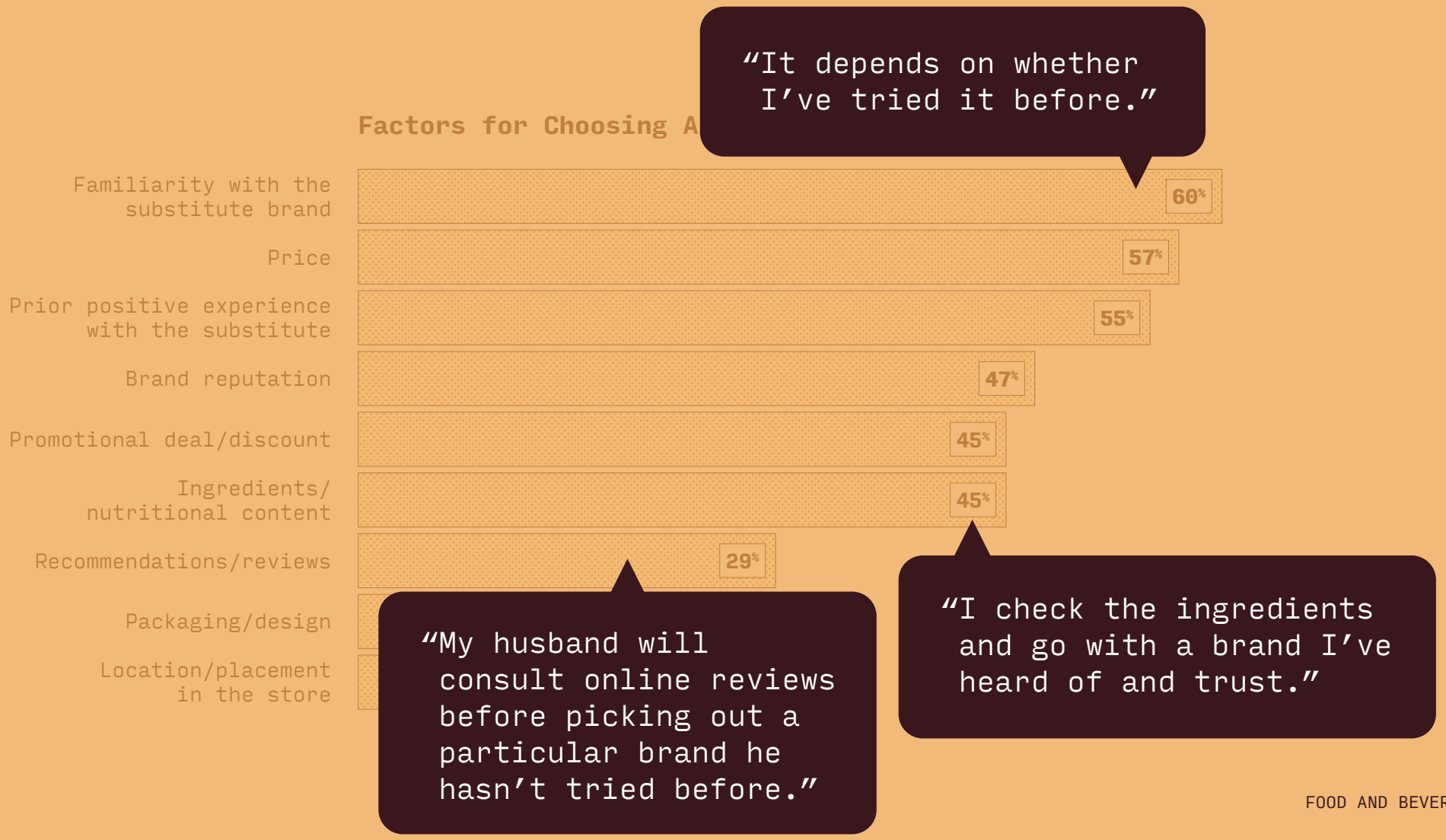
WASTED MONEY AND TIME > INITIAL COST SAVINGS

Challenger brands,
how can you convince
a shopper to substitute?

Data shows choices **are multifaceted.**



Data shows choices **are multifaceted.**



To win at the shelf,
look for ways your packaging can appeal to brand loyalist desires.

BODYARMOR

Their data suggested

59%

of consumers **always read the ingredients/ nutrition facts**

BODYARMOR

Complete rebrand with a packaging overhaul going for Gatorade loyalists.

Bottle design updates based on data and differentiators:

- **Flavor front and center**
- **Real fruit imagery**
- **Nutrition claims on front of bottle, not the back**

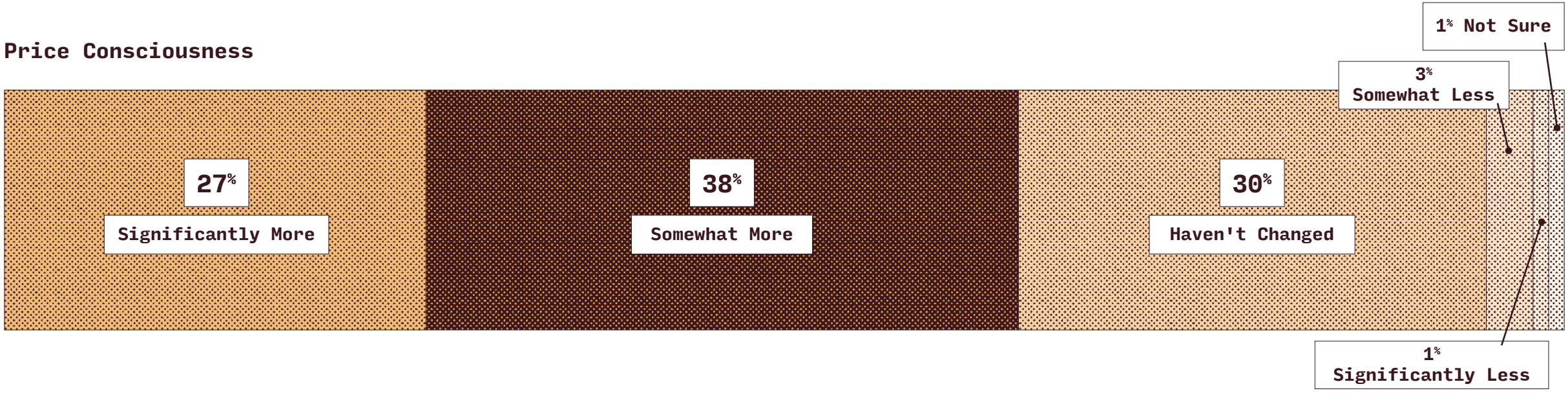
SOMETIMES, THE SUBSTITUTION WINNER IS THE STORE BRAND.

SO, WHAT'S THE HYPE?

Let's revisit **price consciousness.**

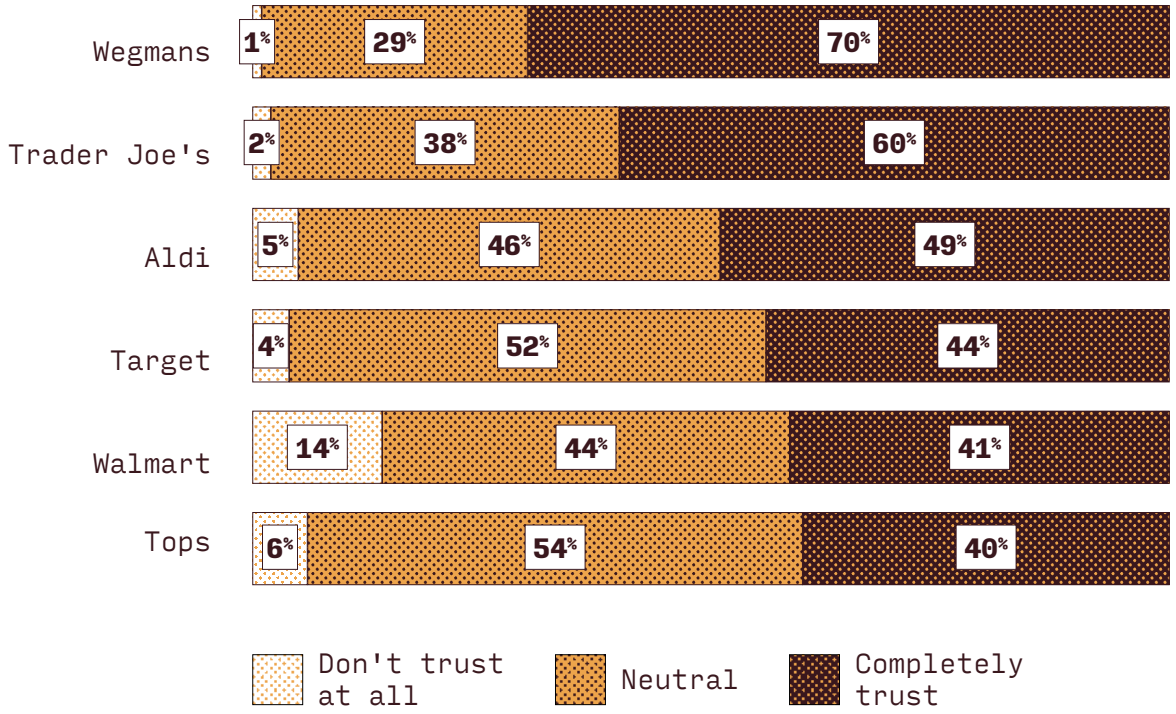
This opens the door for value-driven brands. **Especially private labels.**

But of course, even here, **store brand matters.**

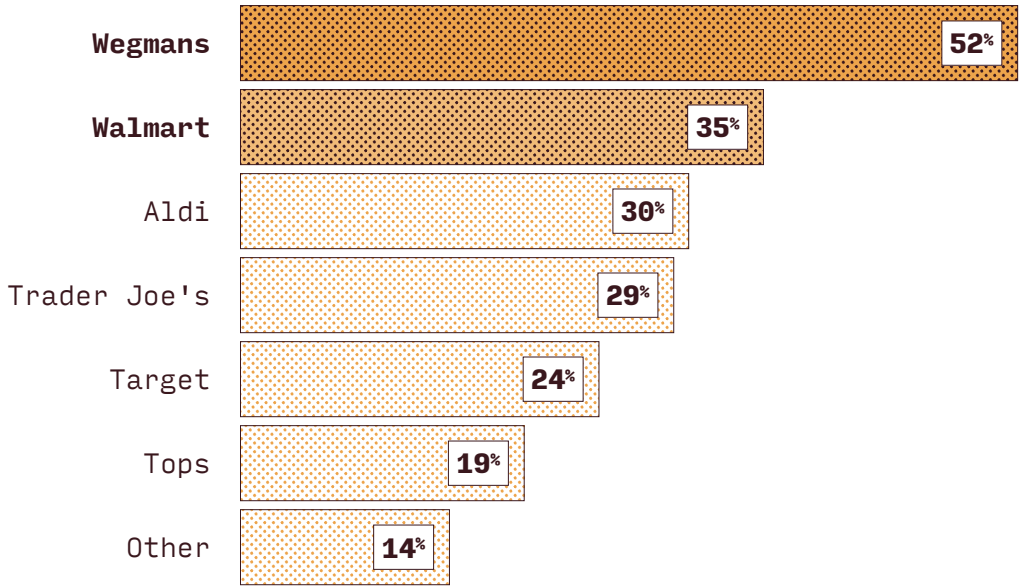


Store brand trust, **a nuanced tale.**

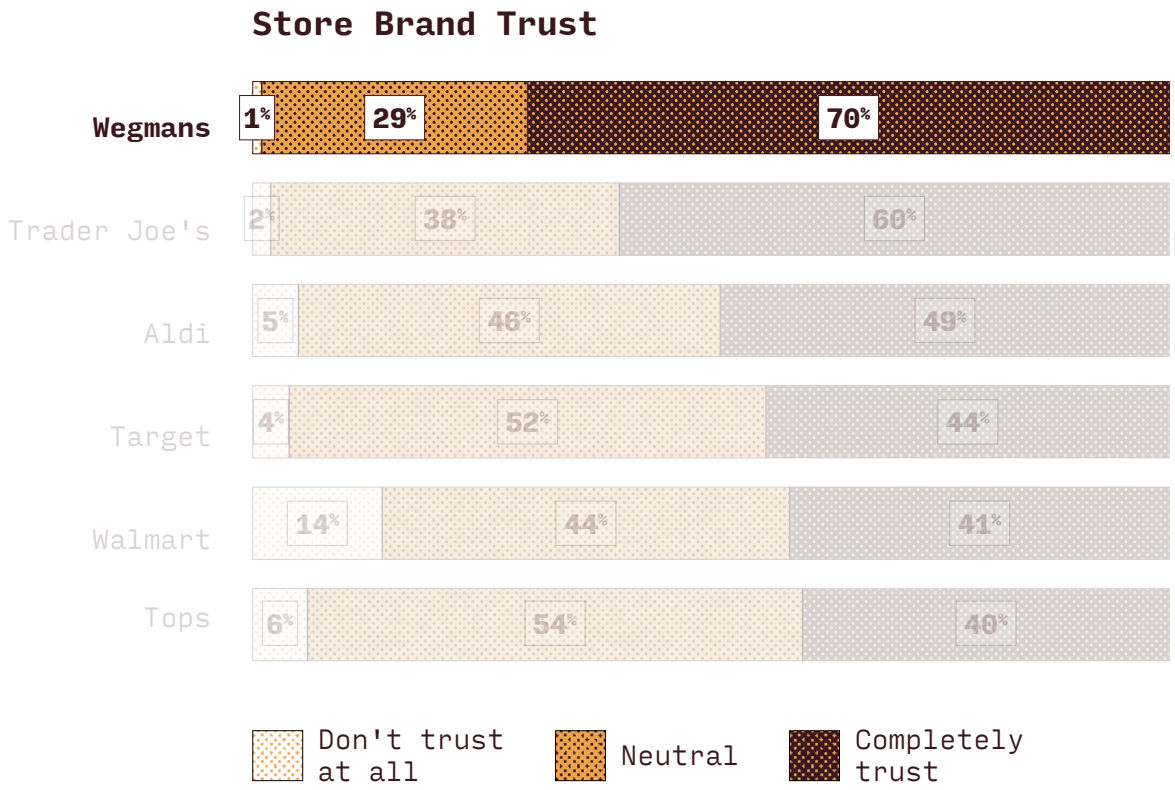
Store Brand Trust

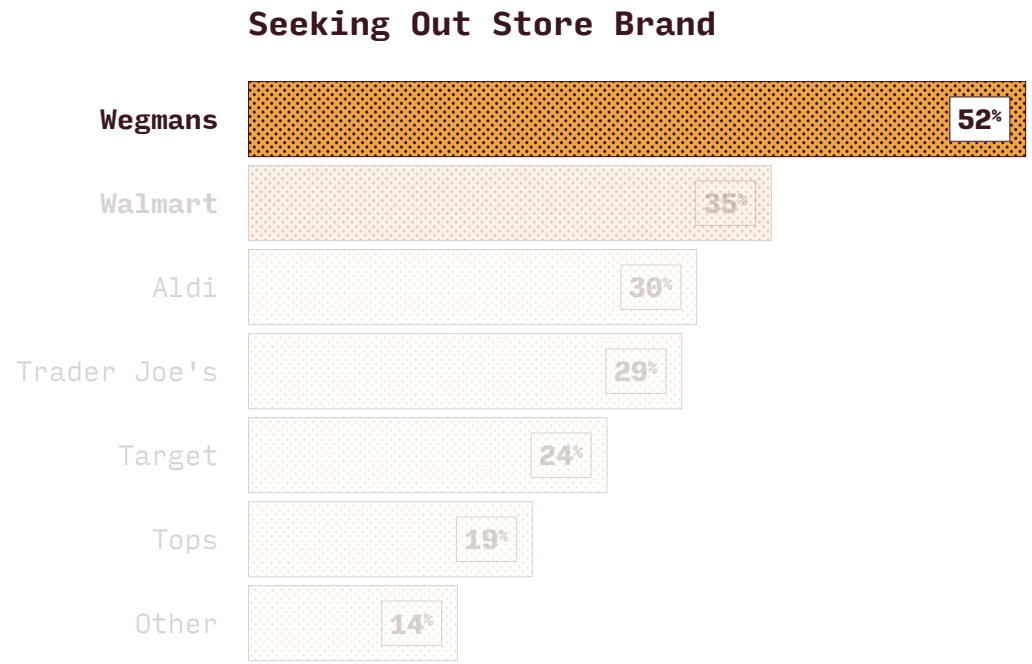


Seeking Out Store Brand

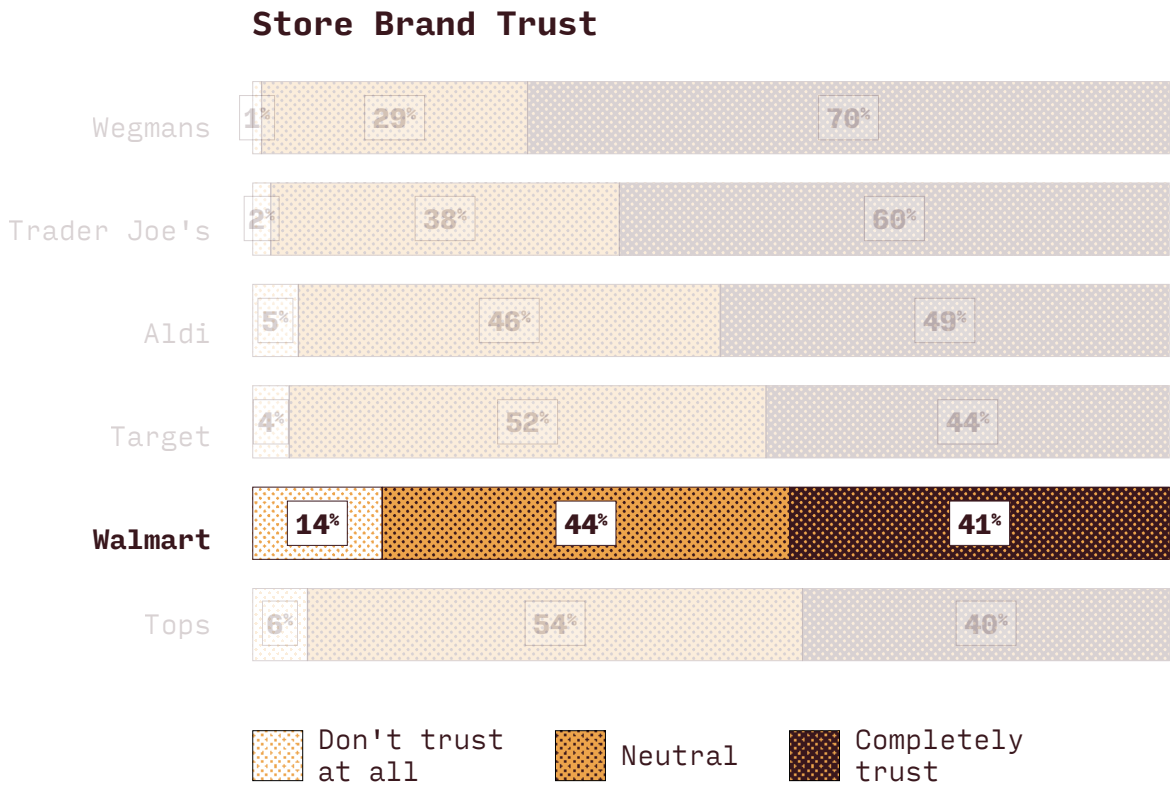


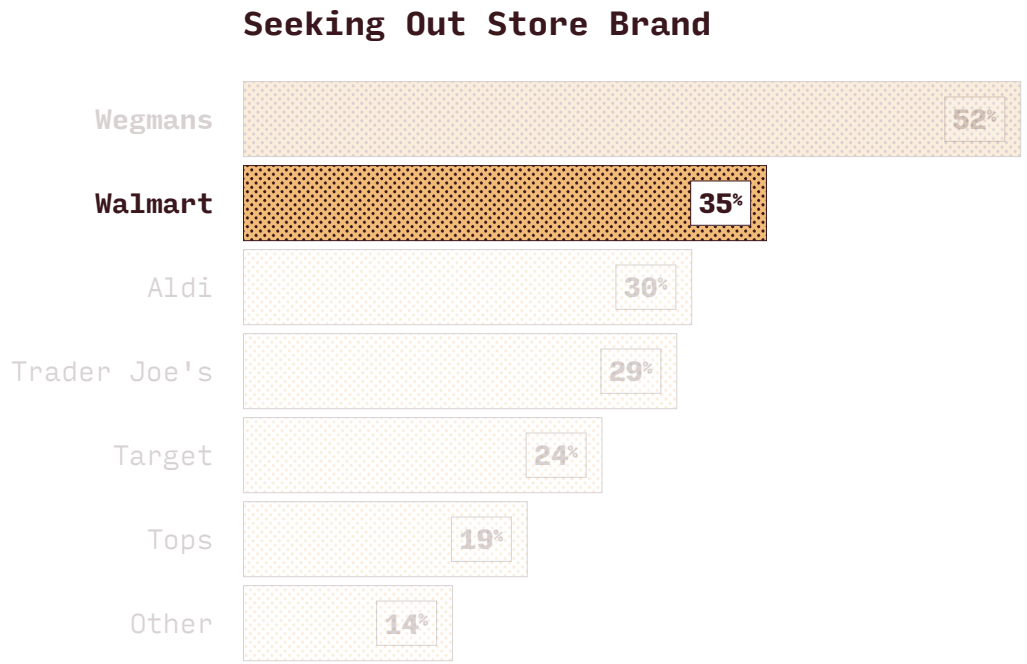
Wegmans has massive consumer trust and preference.





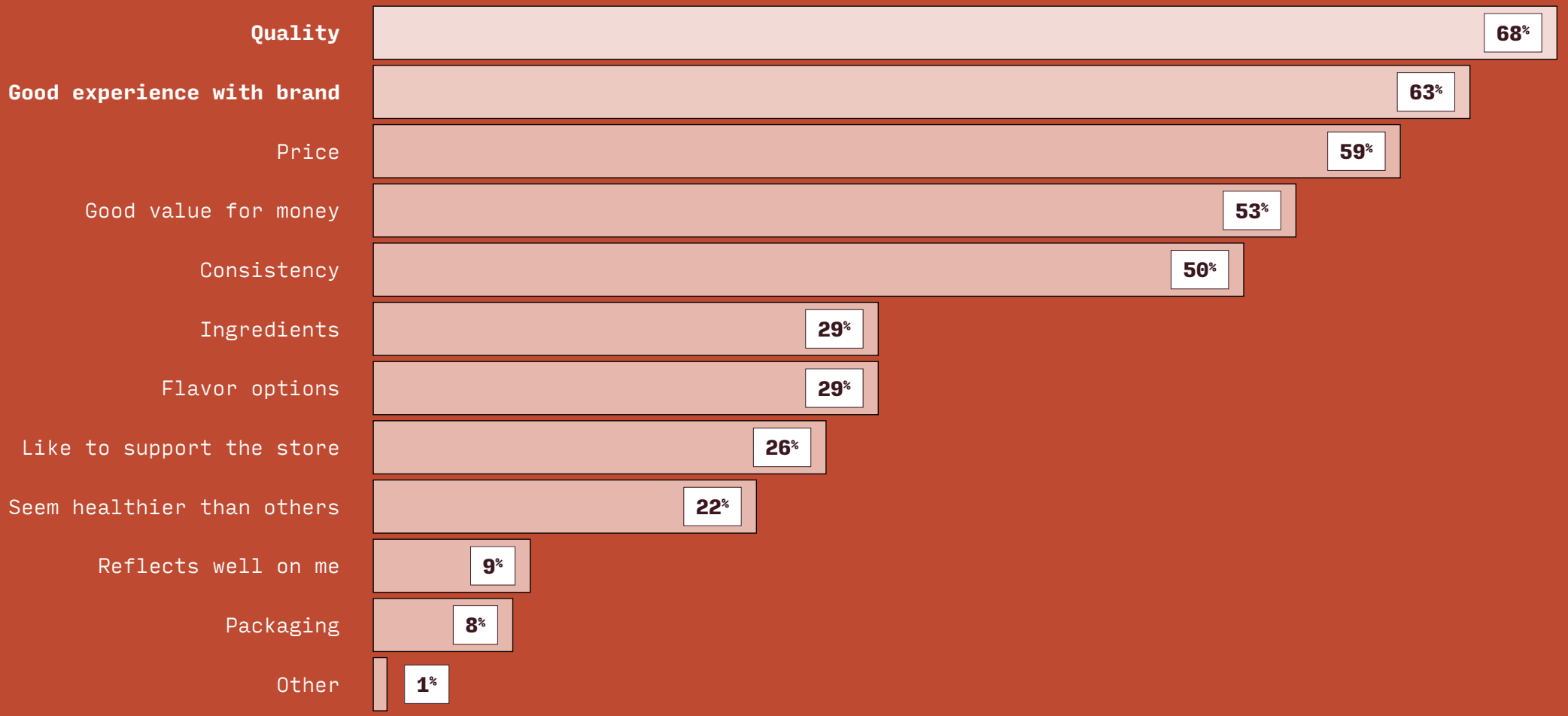
Meanwhile, **Walmart stands out** as a polarizing chain.





A TALE OF TWO SHOPPERS

Wegmans


Quality
68%
Good experience with brand
63%
Price
59%
Good value for money
53%
Consistency
50%
Ingredients
29%
Flavor options
29%
Like to support the store
26%
Seem healthier than others
22%
Reflects well on me
9%
Packaging
8%
Other
1%

Wegmans

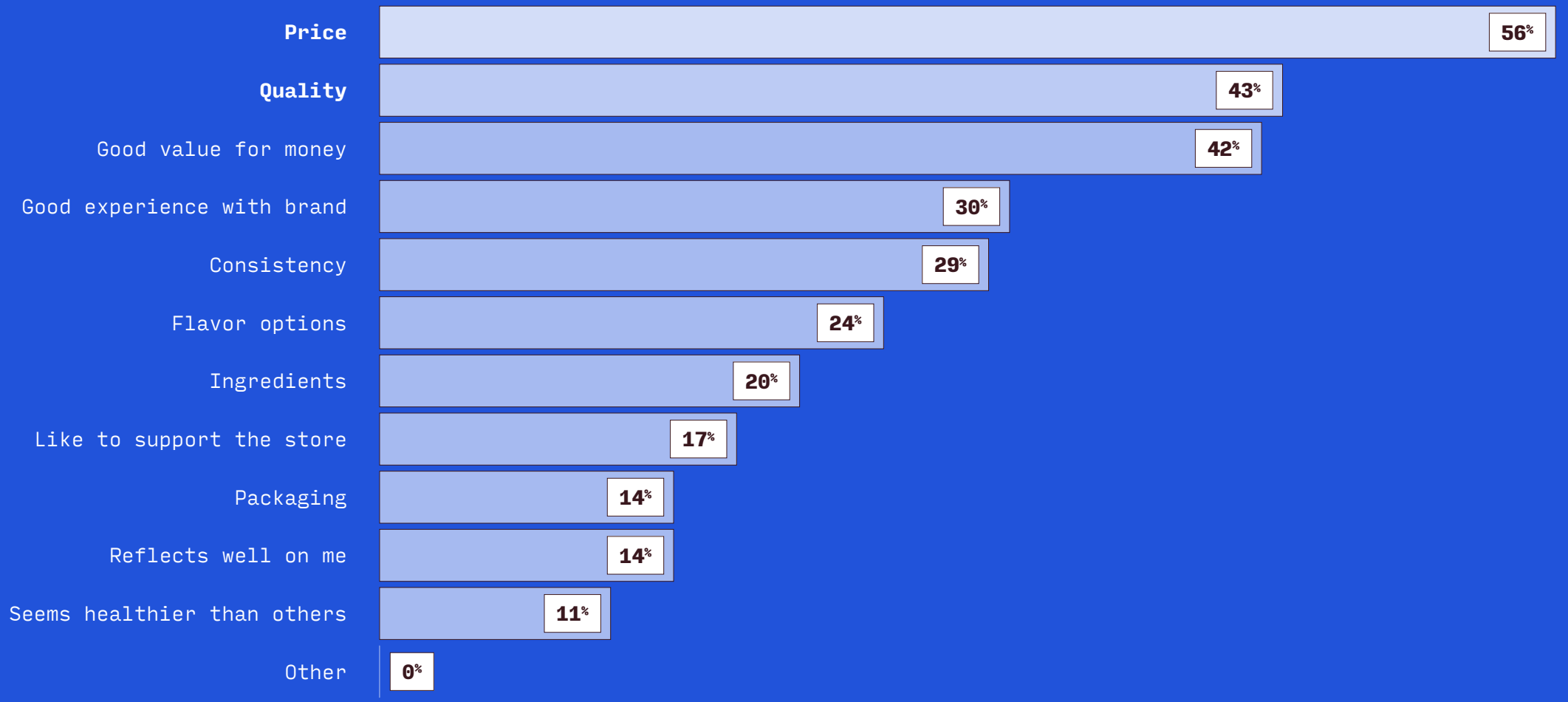
"The quality is really solid, and the prices are fair. A lot of their products **taste just as good – or better – than name brands.** Plus, I shop at Wegmans often, so it's convenient and easy to trust their brand."

"High-quality tasting products and better priced than name brands. They also **stand 100% behind their name brand products.** They have good rep."

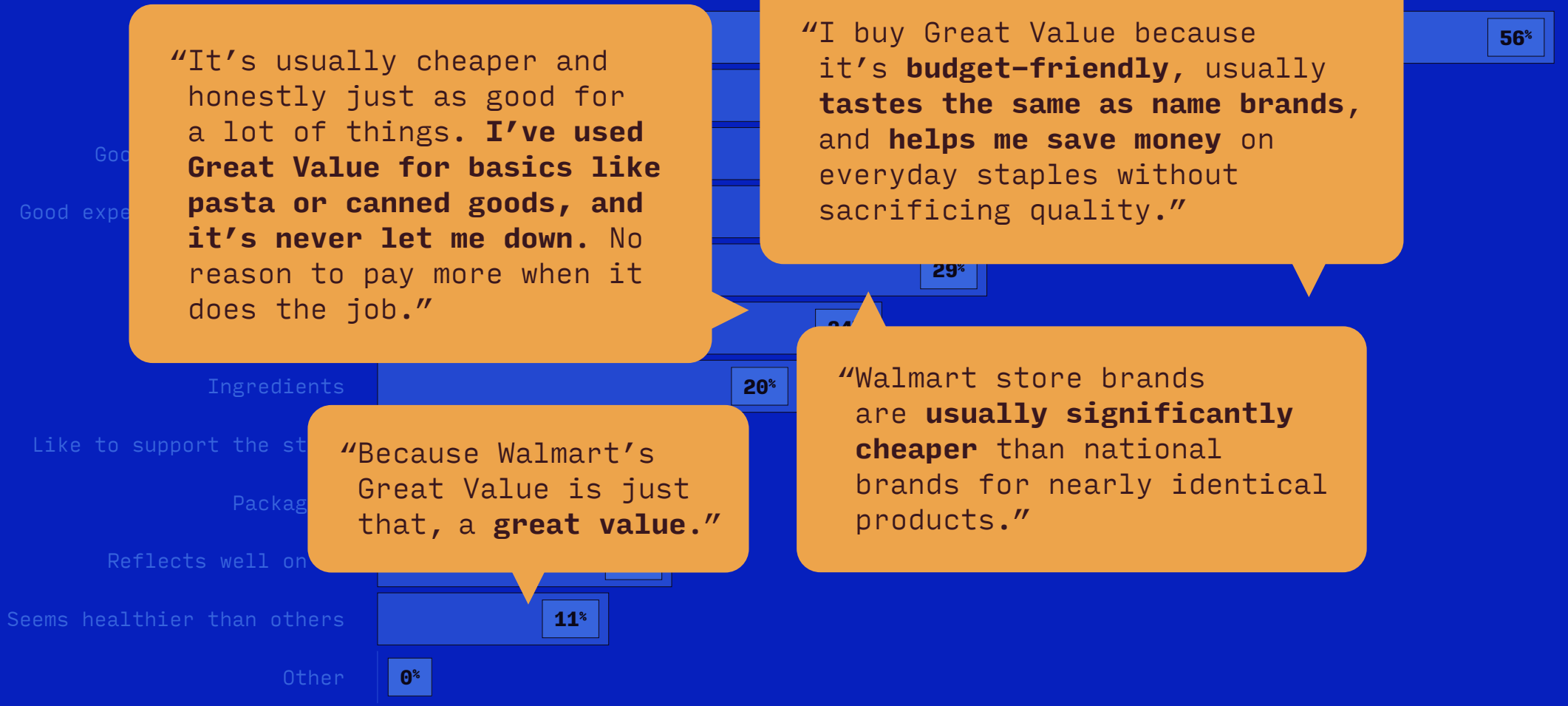
"I grew up going to Wegmans and worked there. **I love their brand/mission and pricing.** Their quality is also great."

"Trusted brand, and they always have the items in stock. **Consistency.**"

Walmart


Price
56%
Quality
43%
Good value for money
42%
Good experience with brand
30%
Consistency
29%
Flavor options
24%
Ingredients
20%
Like to support the store
17%
Packaging
14%
Reflects well on me
14%
Seems healthier than others
11%
Other
0%

Walmart



"It's usually cheaper and honestly just as good for a lot of things. **I've used Great Value for basics like pasta or canned goods, and it's never let me down.** No reason to pay more when it does the job."

"I buy Great Value because it's **budget-friendly**, usually **tastes the same as name brands**, and **helps me save money** on everyday staples without sacrificing quality."

"Walmart store brands are **usually significantly cheaper** than national brands for nearly identical products."

"Because Walmart's Great Value is just that, a **great value.**"

What do these retailer insights mean for marketers?

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- [x] **Know your audience**

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- [x] **Know your audience**
- [x] **Know THEIR audience**

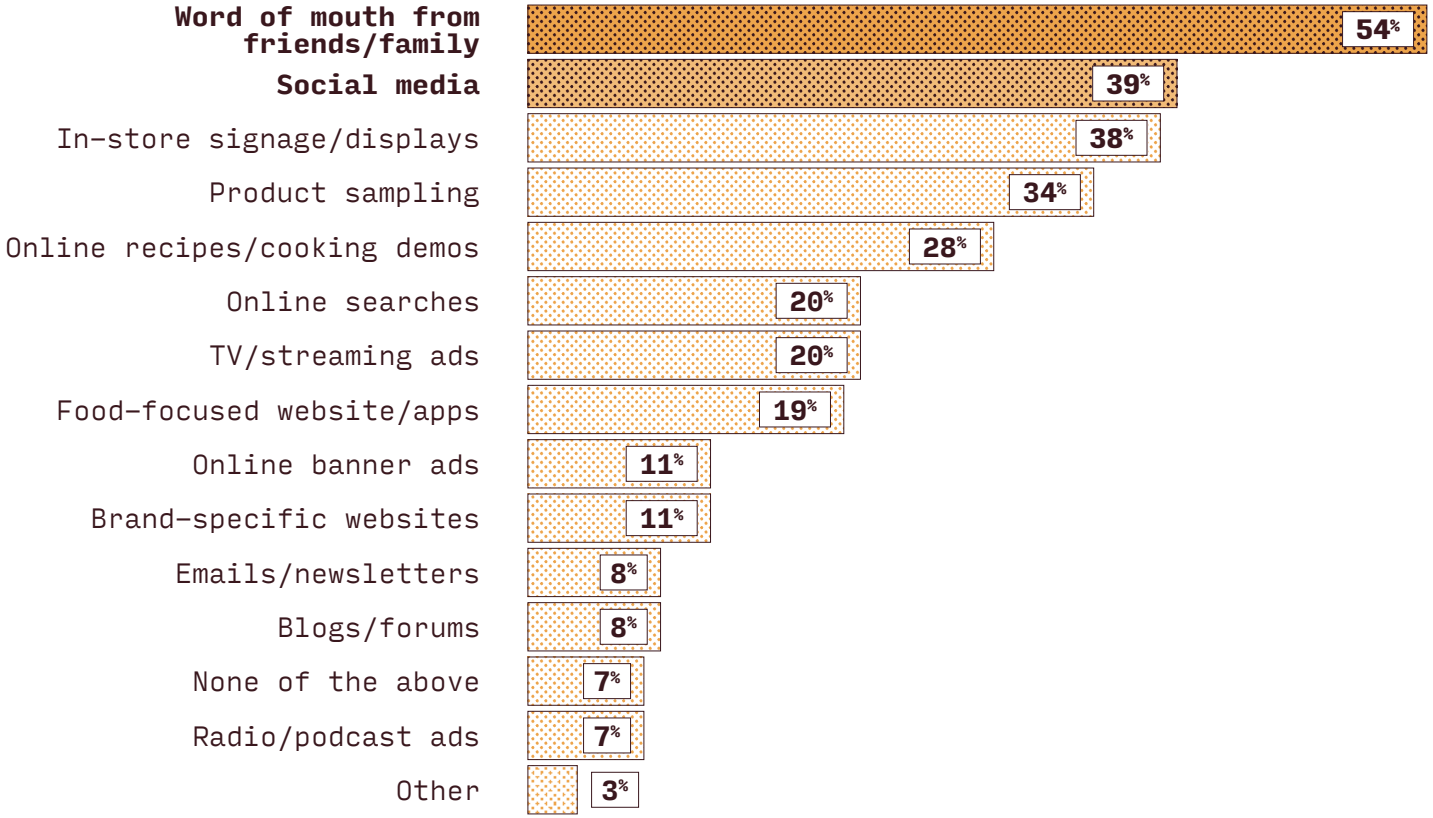
What do these retailer insights mean for marketers?

- **Know your audience**
- **Know THEIR audience**
- **Understand how your brand fits in that intersection**

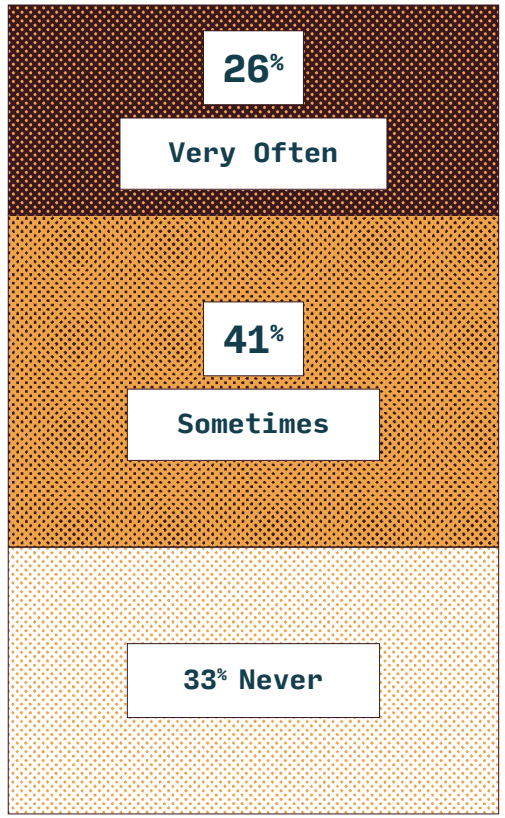
DOUBLING DOWN ON LOYALTY.

The power of people.

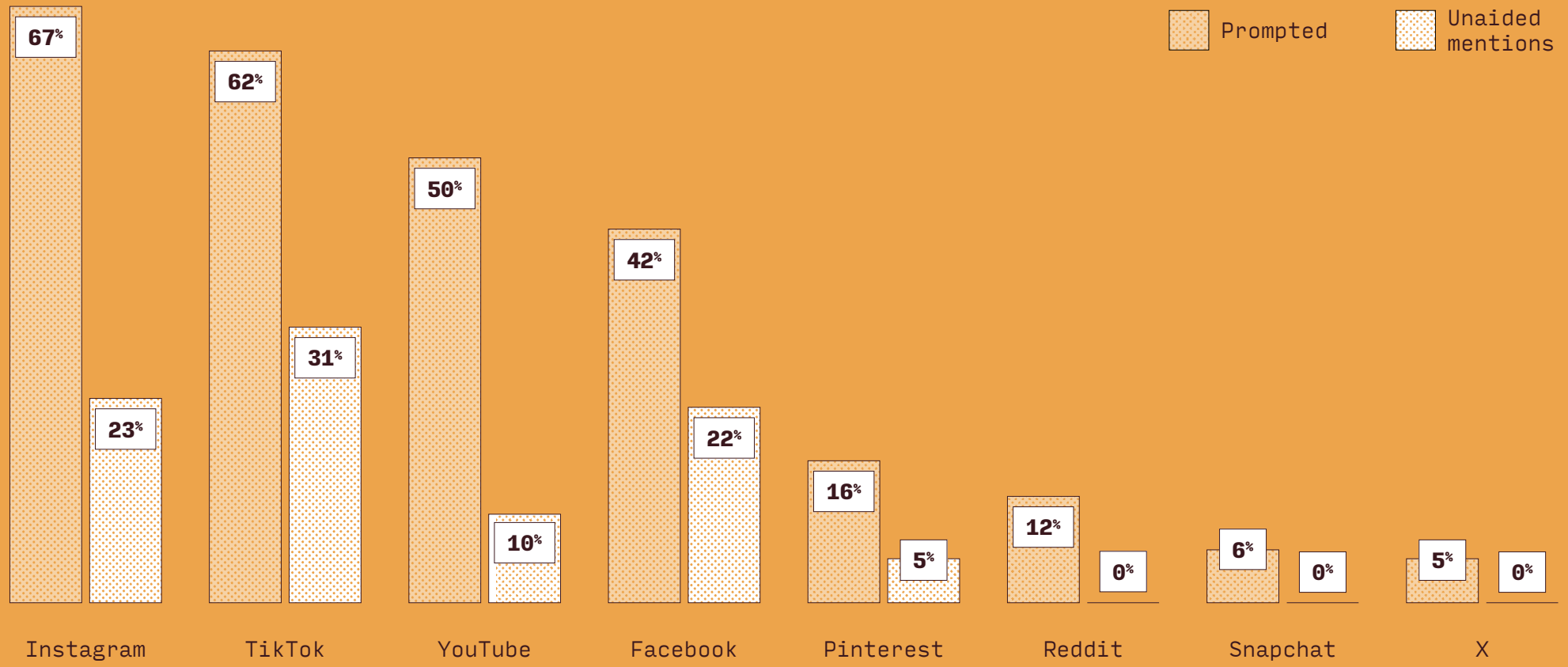
Influential Content



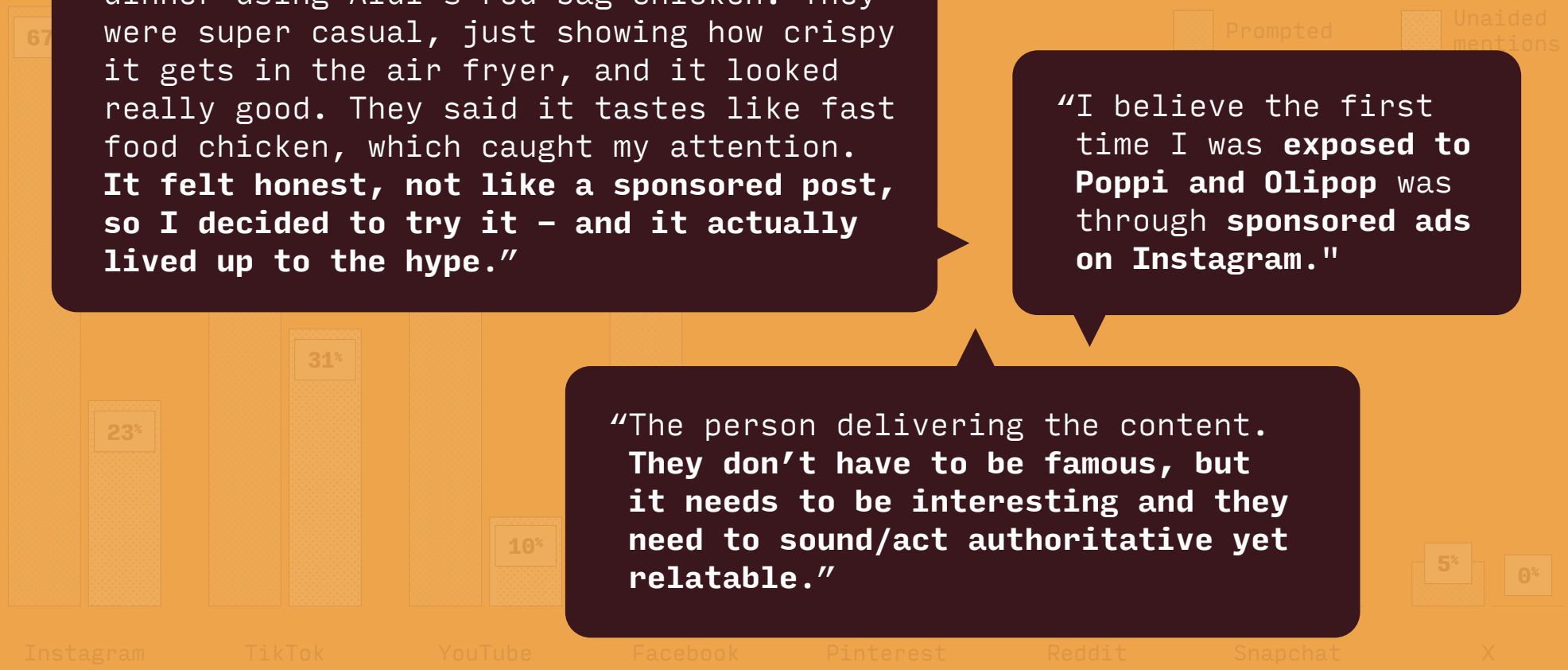
Discovery Through Social



Influential social platforms.



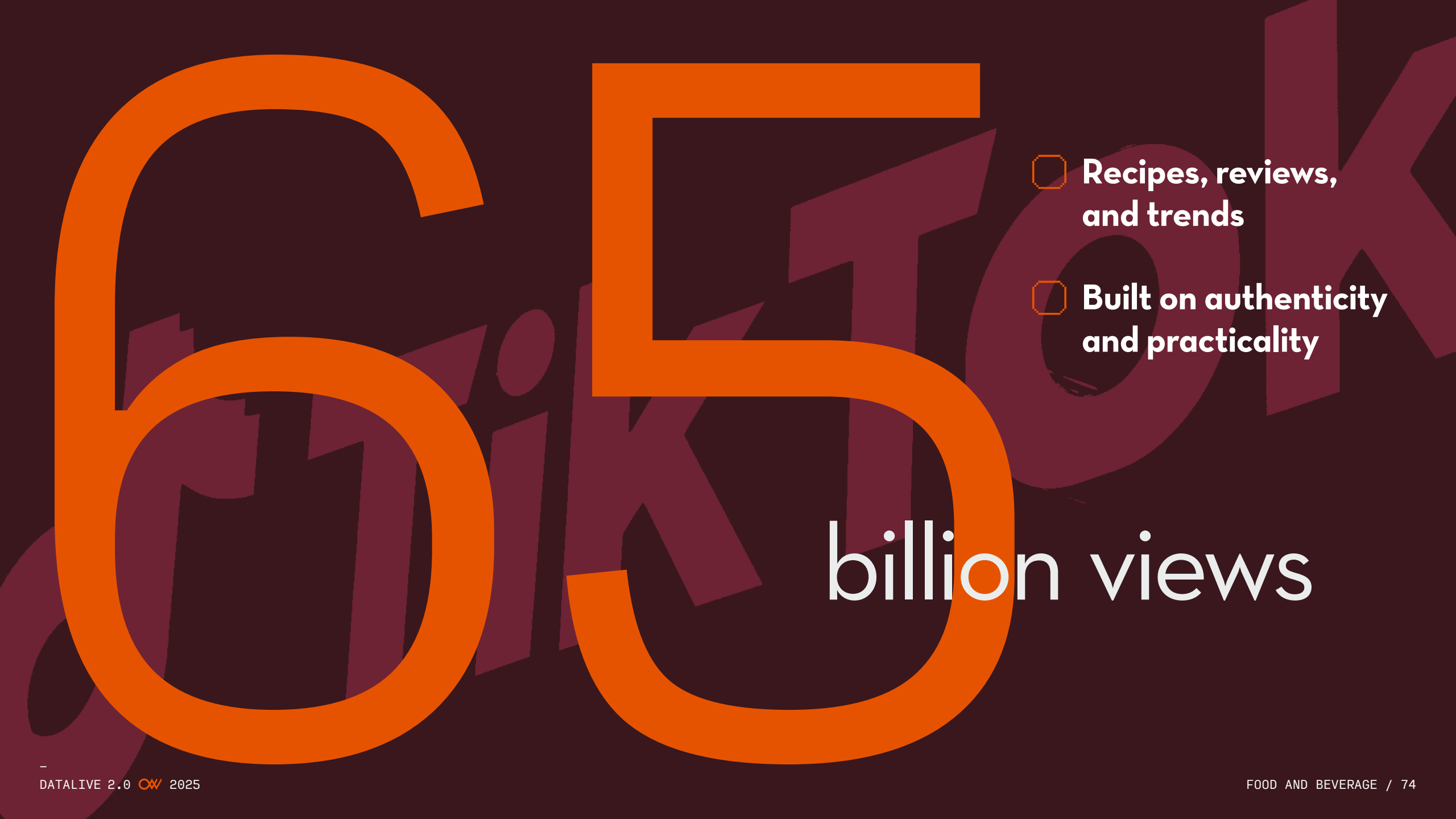
Influential social platforms.



"I saw a TikTok where someone made a quick dinner using Aldi's red bag chicken. They were super casual, just showing how crispy it gets in the air fryer, and it looked really good. They said it tastes like fast food chicken, which caught my attention. **It felt honest, not like a sponsored post, so I decided to try it – and it actually lived up to the hype.**"

"I believe the first time I was **exposed to Poppi and Olipop** was through **sponsored ads on Instagram."**

"The person delivering the content. **They don't have to be famous, but it needs to be interesting and they need to sound/act authoritative yet relatable.**"


65
billion views
Recipes, reviews, and trends
Built on authenticity and practicality

NEWS

Cottage cheese shortage spurred by viral TikTok recipes

The TikTok Feta Effect

Cheese suppliers have been swept up in the video recipe phenomenon known as baked feta pasta.

THE TIKTOK EFFECT IS REAL.

Chef Tini Younger's Impact Goes Way Beyond Mac & Cheese

FOOD & DRINK

Cucumber shortage sparked by viral TikTok recipes: 'A few people can have a lot of influence'

By Brooke Kato

Published Aug. 24, 2024, 1:48 p.m. ET

Comments

1

IDENTIFY WHERE YOUR BRAND AND THESE TRENDS MEET.

2

PROVIDE A VALUE FOR AUDIENCES.

3

AUTHENTICITY OVER POLISH.

4

TAP INFLUENCERS TO DRIVE PURCHASE CONSIDERATION.

Find the right influencers.

Find the right influencers. Lean into *their* brand.

Find the right influencers.
Lean into *their* brand.
And pay them.


YOU MAY NEED
TO RELINQUISH
SOME CREATIVE
CONTROL (YIKES).


SPEAKING
OF THE RIGHT
INFLUENCER.

SAM WAY

@SAMSEATS

SAM WAY

@SAMSEATS

RELATABLE?

SAM WAY

@SAMSEATS

RELATABLE?

SAM WAY

@SAMSEATS

RELATABLE?

UNIQUE?

SAM WAY

@SAMSEATS

RELATABLE?

UNIQUE?

SAM WAY

@SAMSEATS

RELATABLE?

UNIQUE?

INGREDIENT FOCUSED?

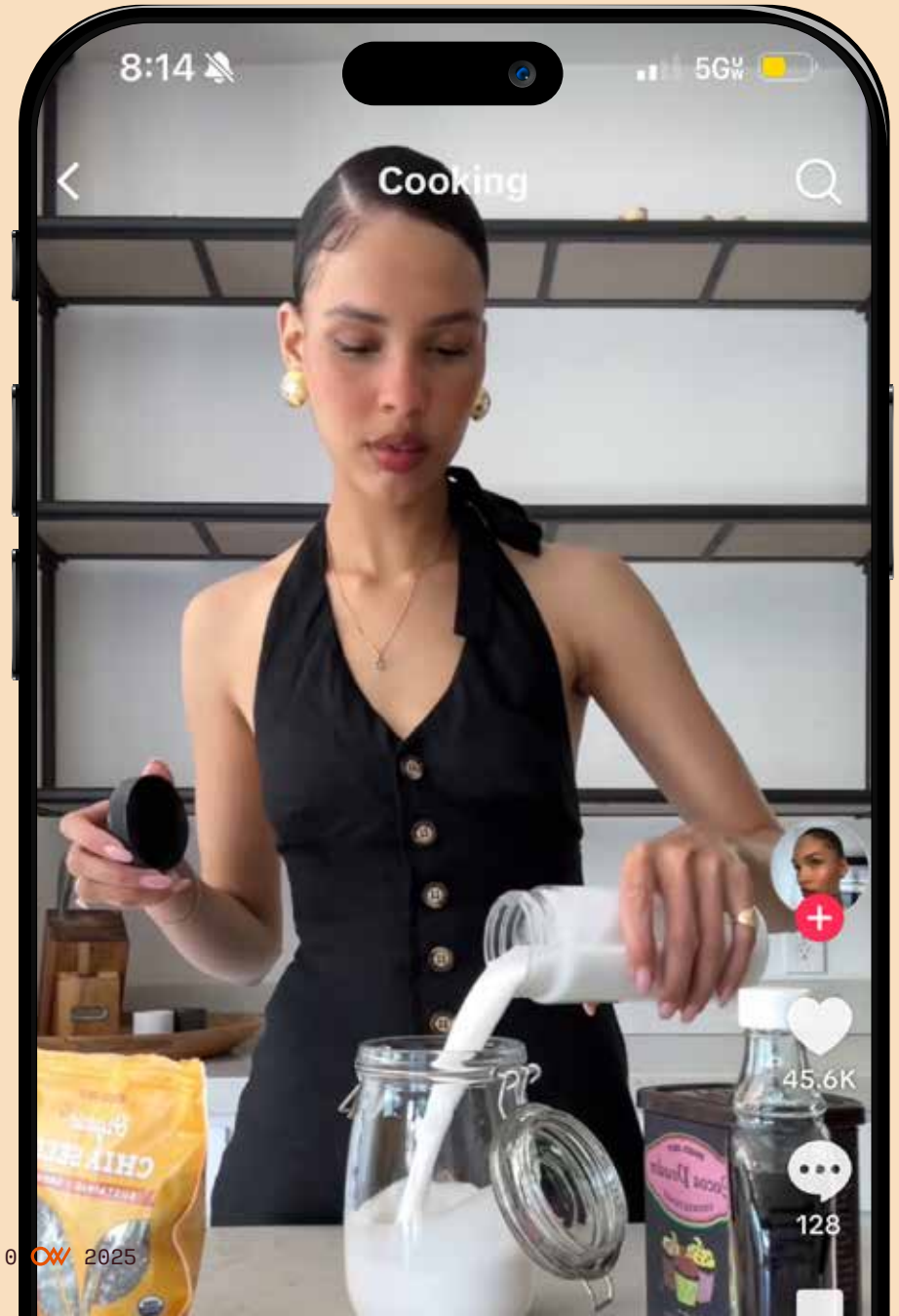
SAM WAY

@SAMSEATS

RELATABLE?

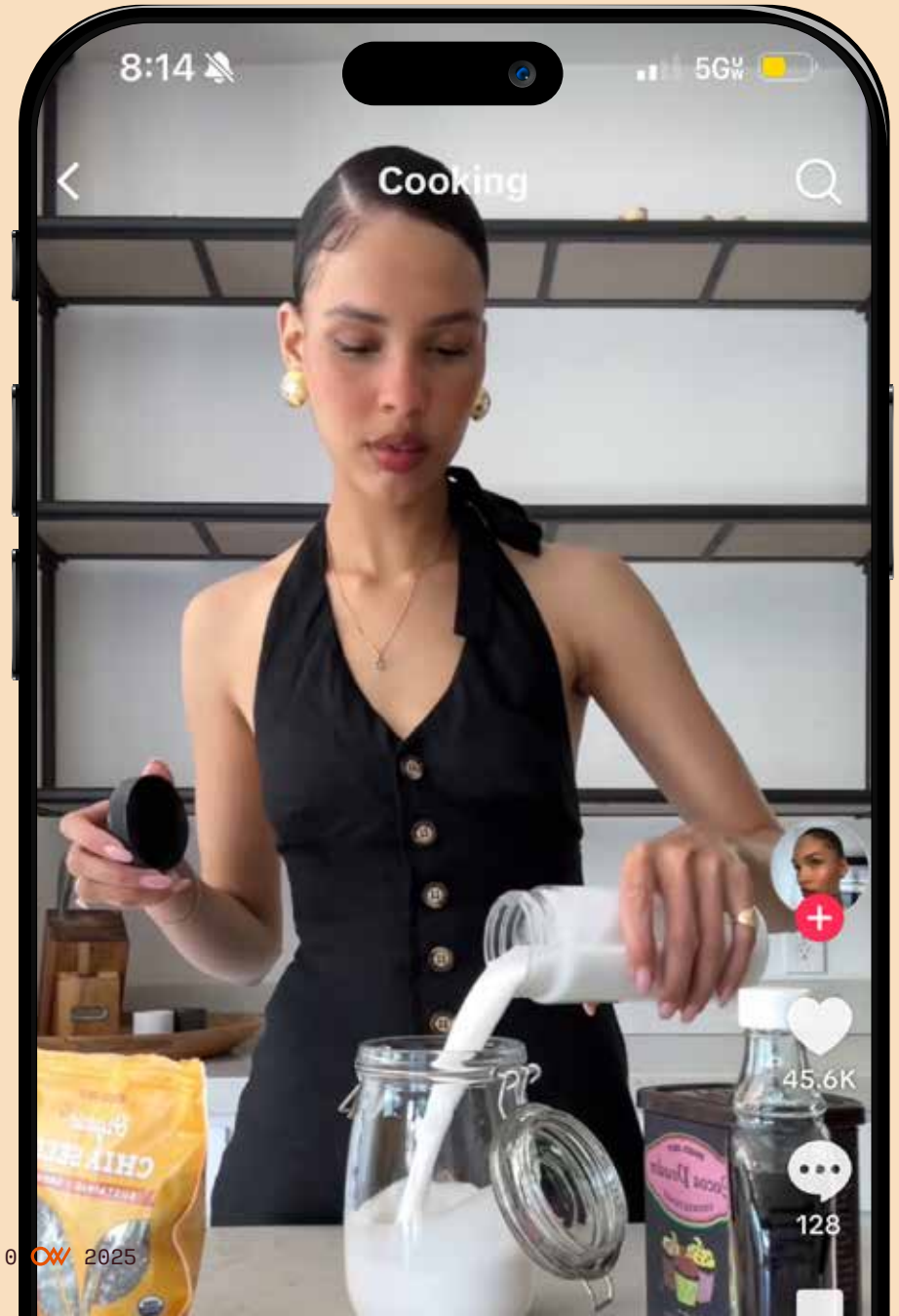
UNIQUE?

INGREDIENT FOCUSED?



NARA SMITH

@NARAAZIZASMITH



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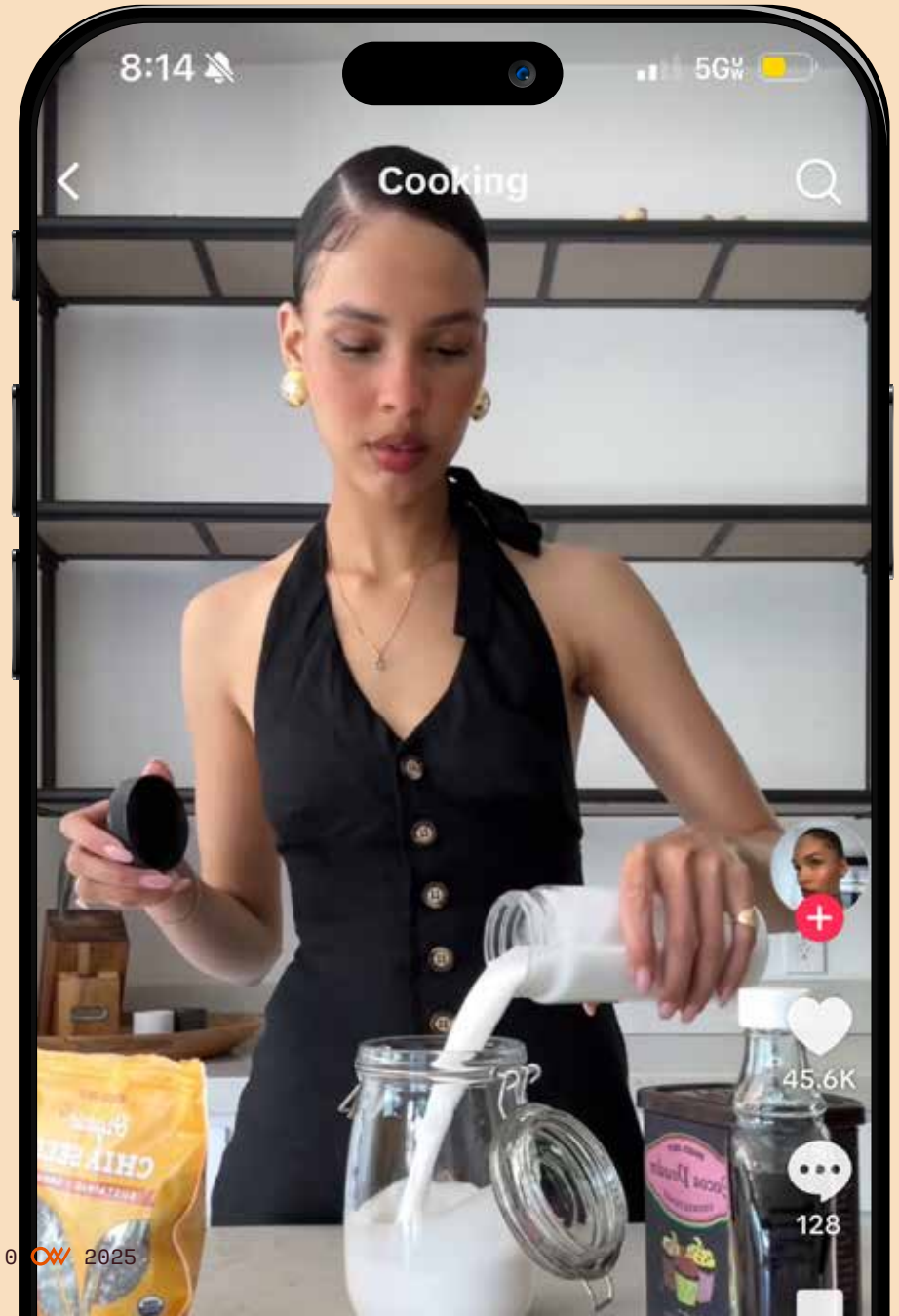
RELATABLE?



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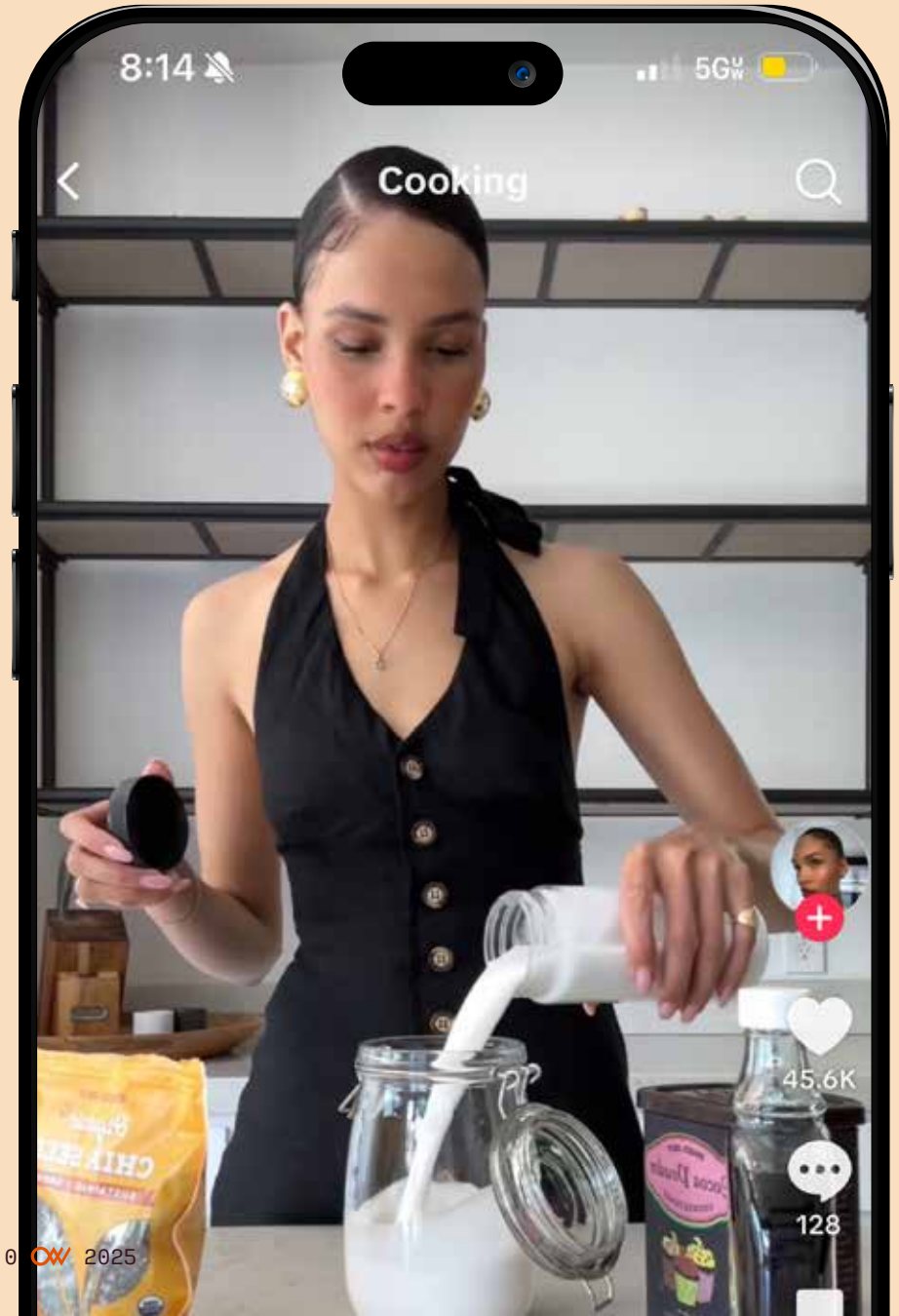

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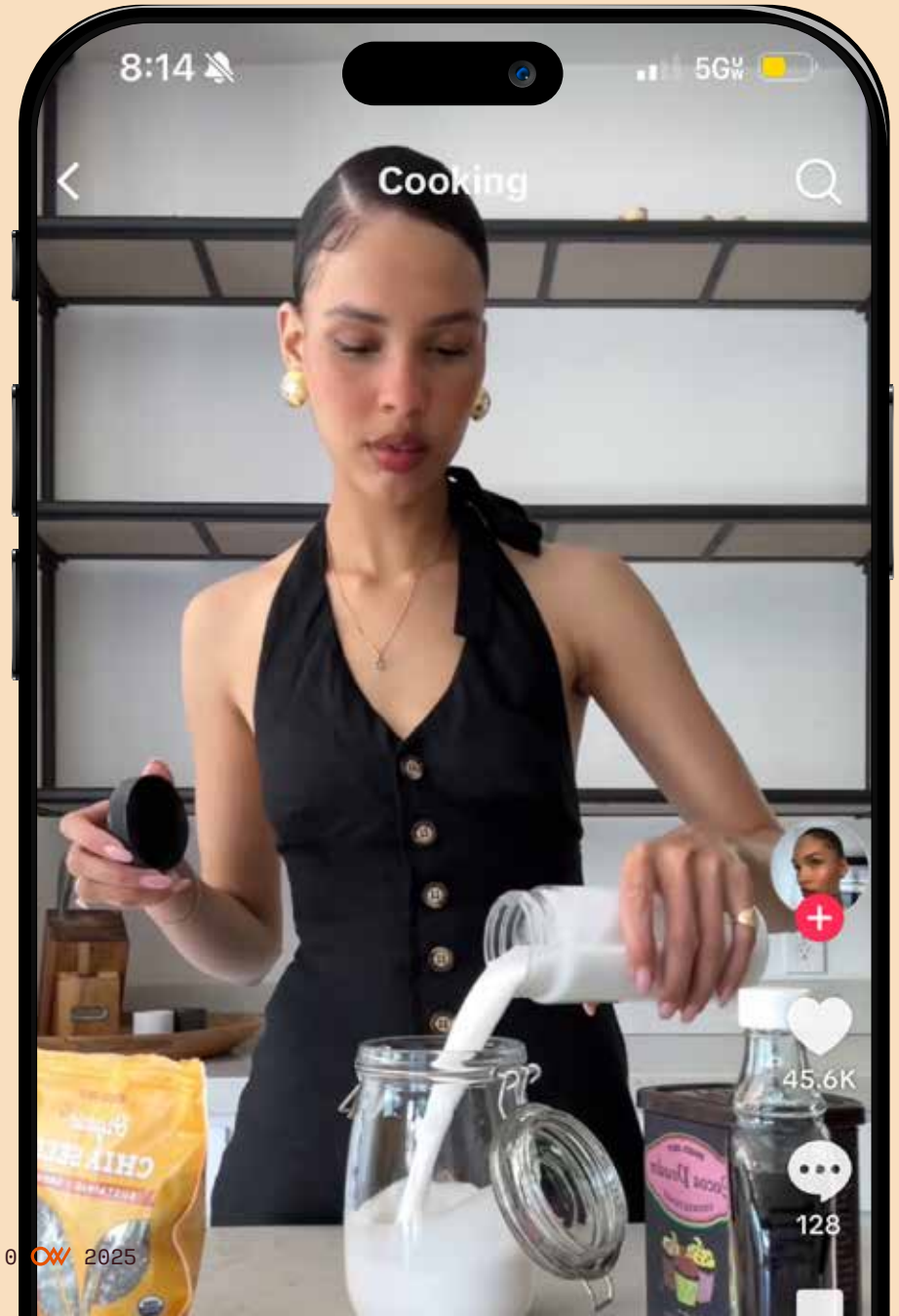
RELATABLE?

PREMIUM?



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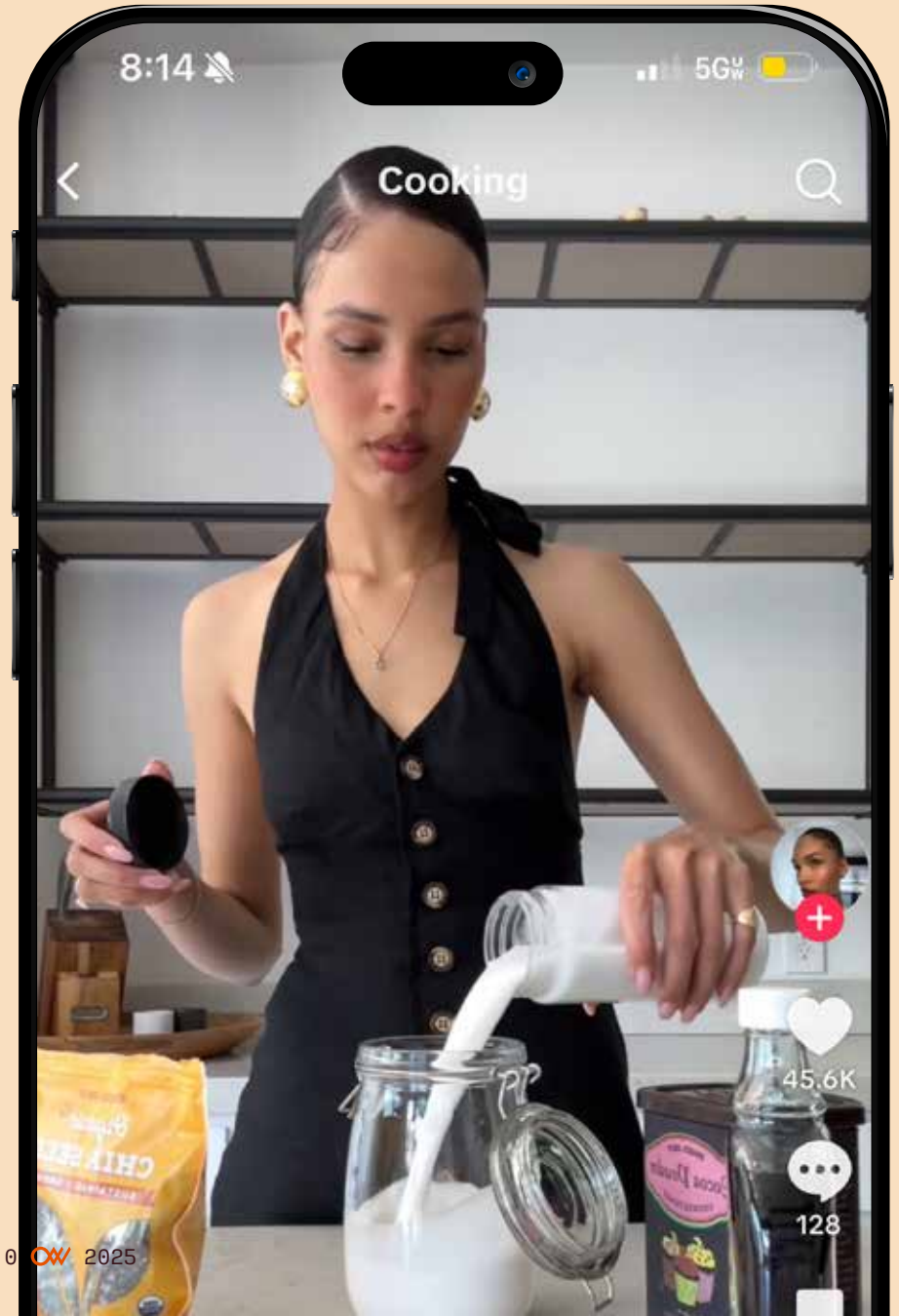
PREMIUM?



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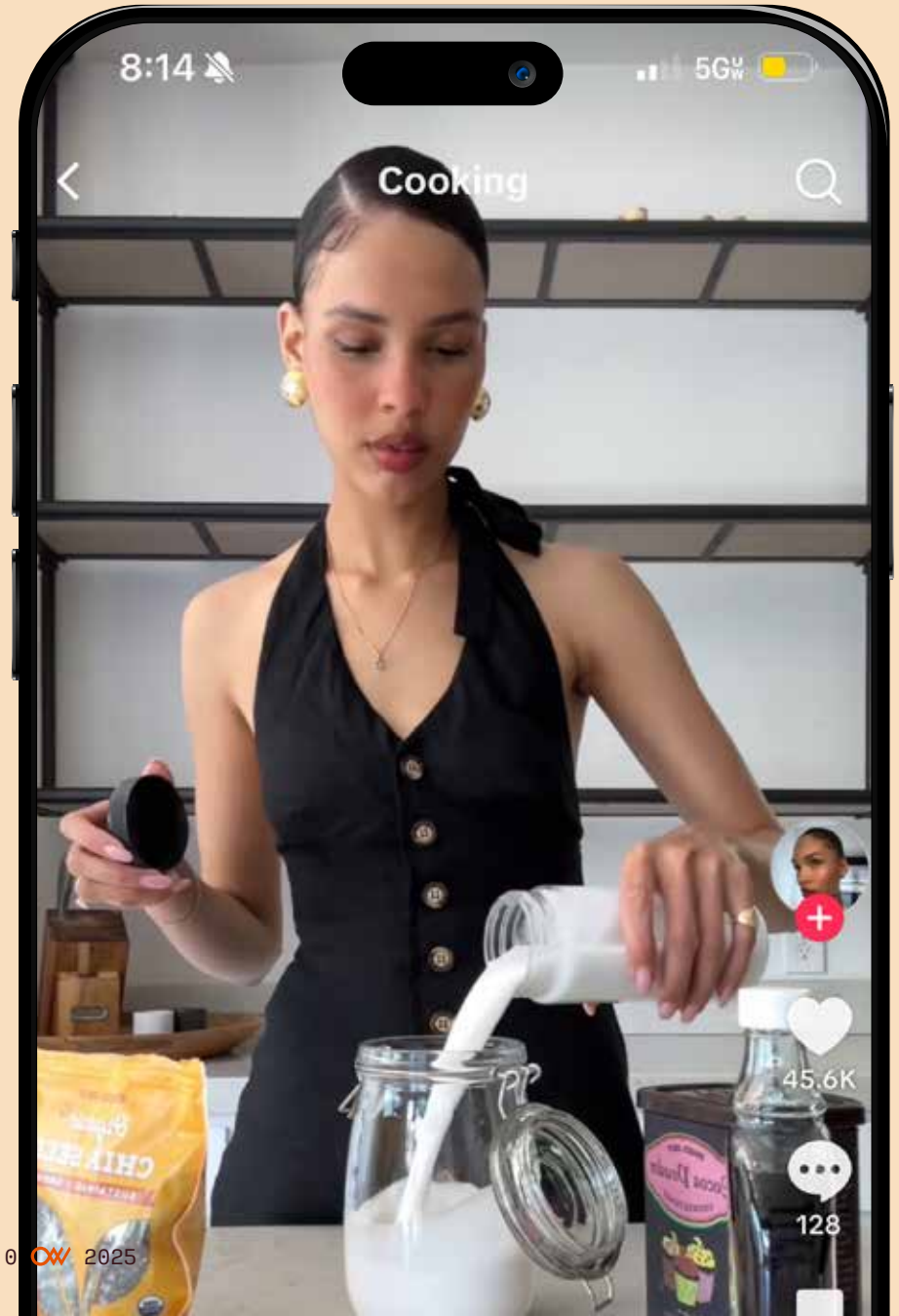
RELATABLE?

PREMIUM?

TALK FACTOR?



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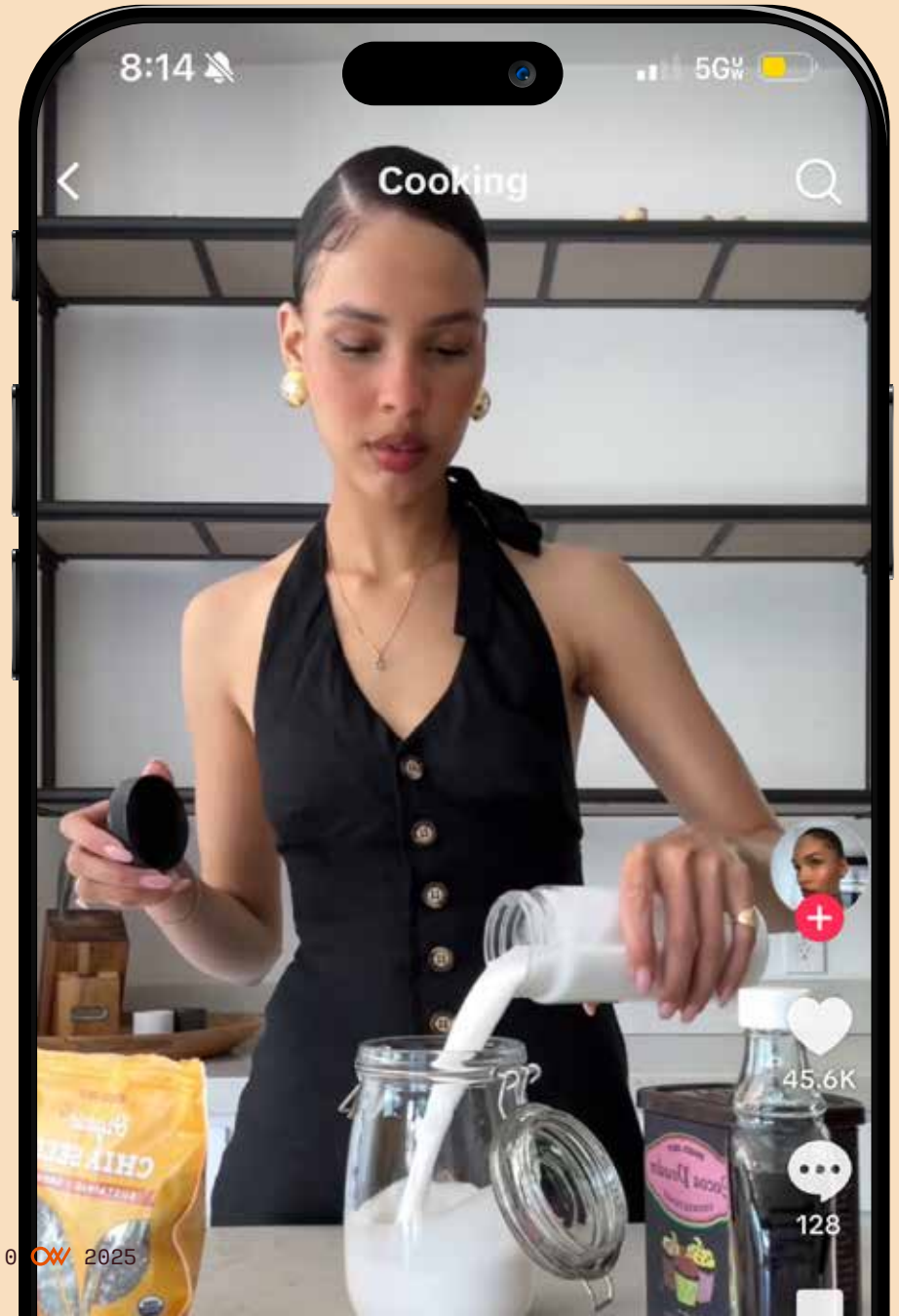
TALK FACTOR?



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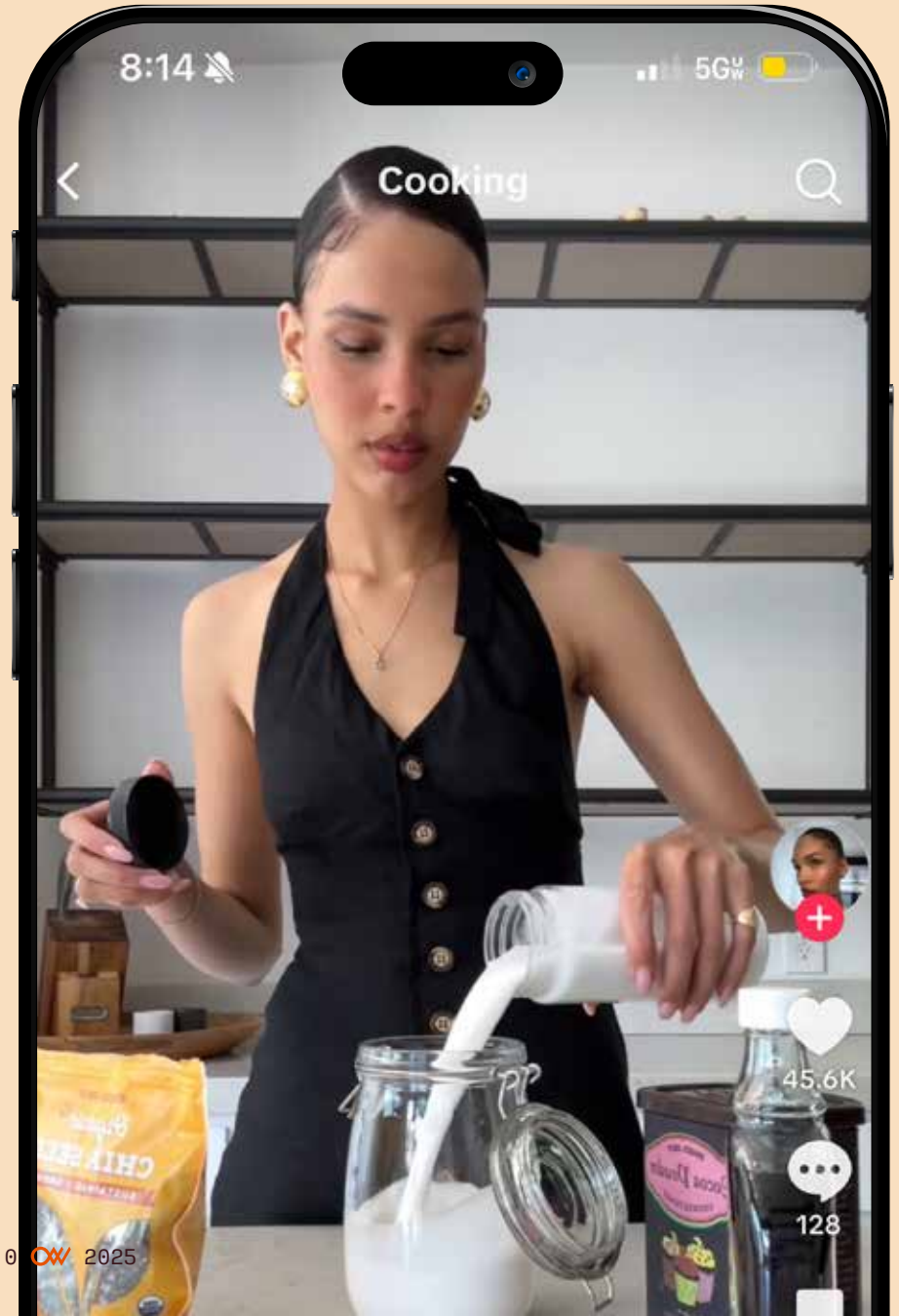
RELATABLE?

PREMIUM?

TALK FACTOR?

HIGH ENGAGEMENT?



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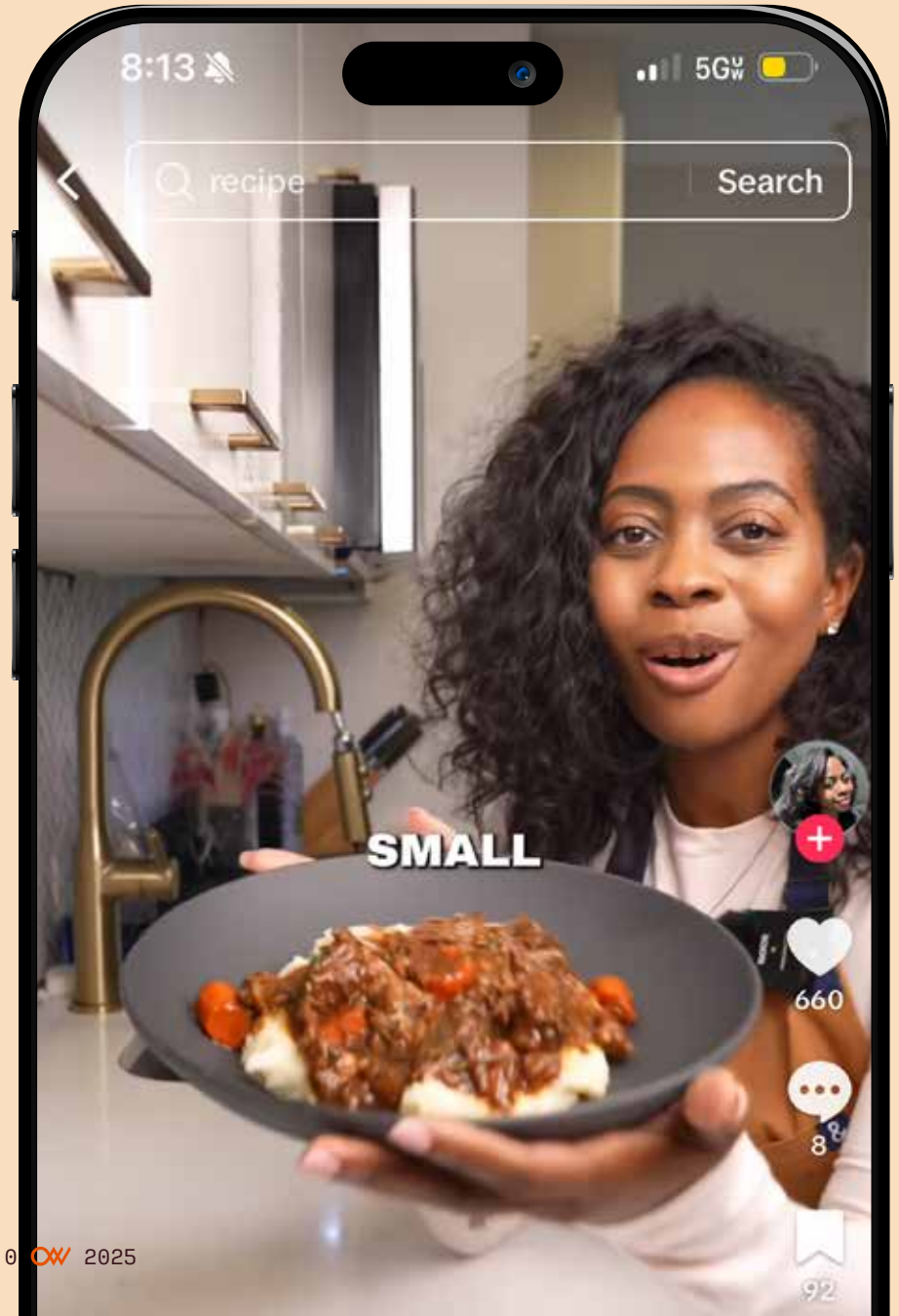
PREMIUM?

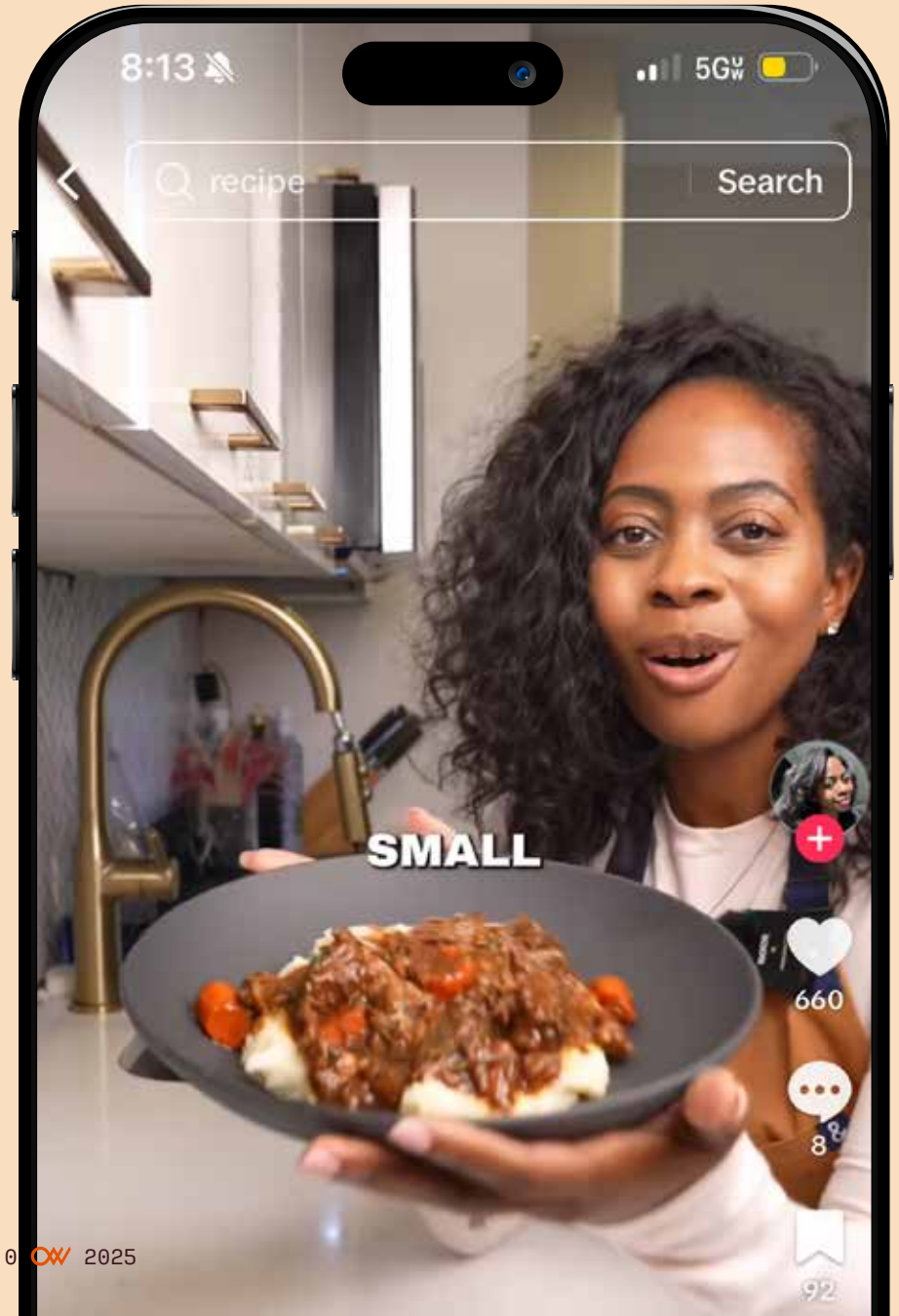
TALK FACTOR?

HIGH ENGAGEMENT?



AUGUST

@THERES.FOOD.AT.HOME



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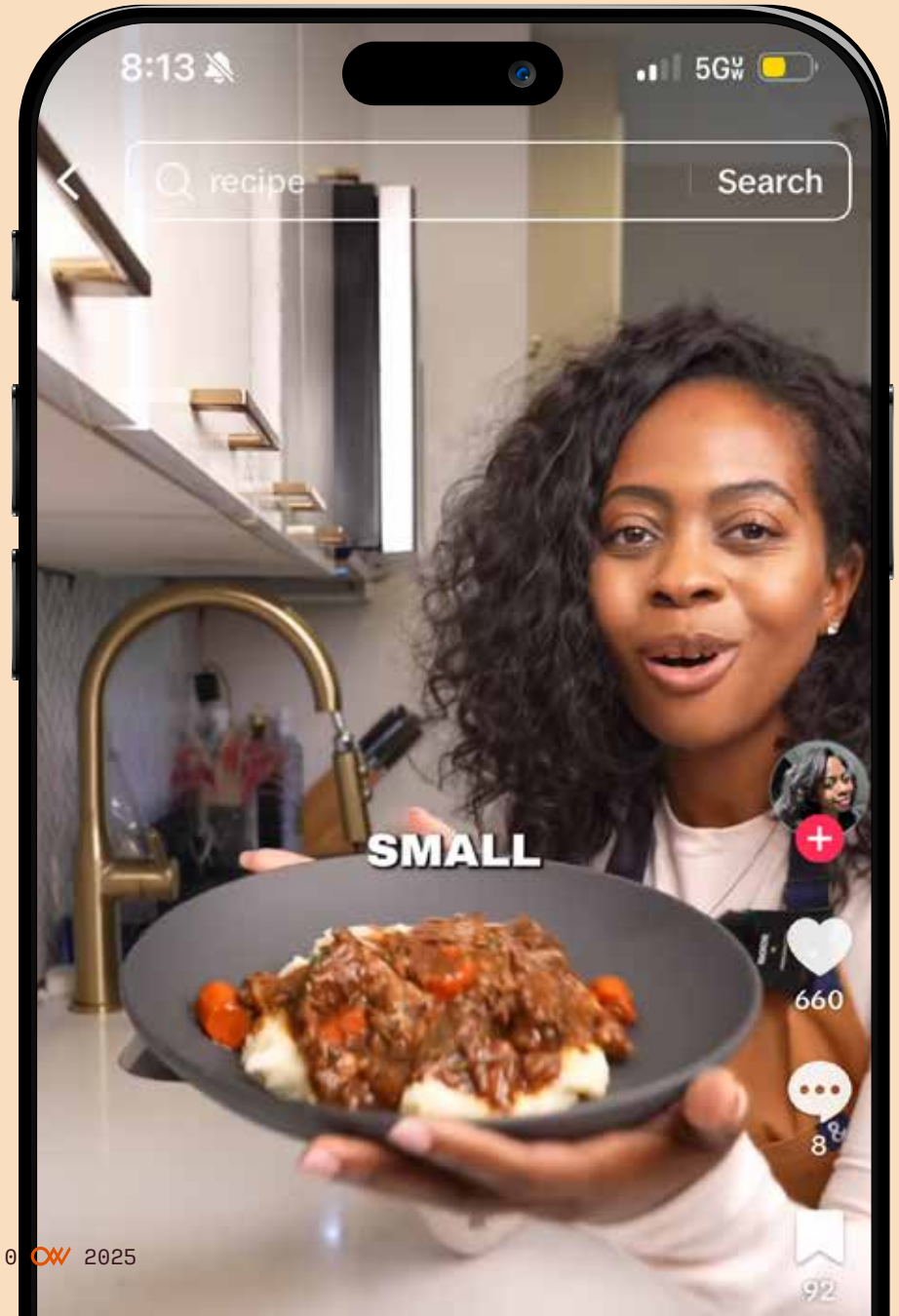

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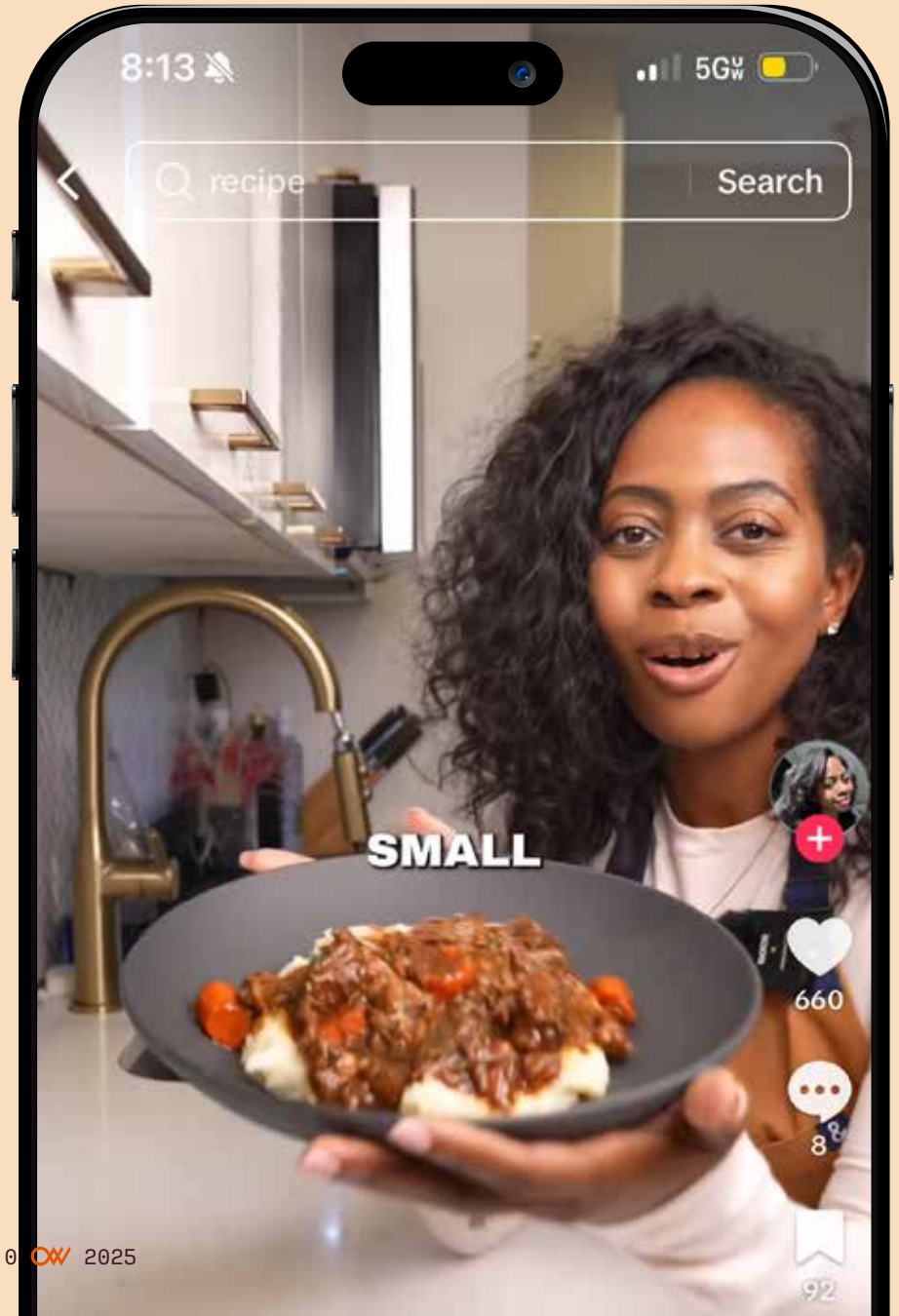

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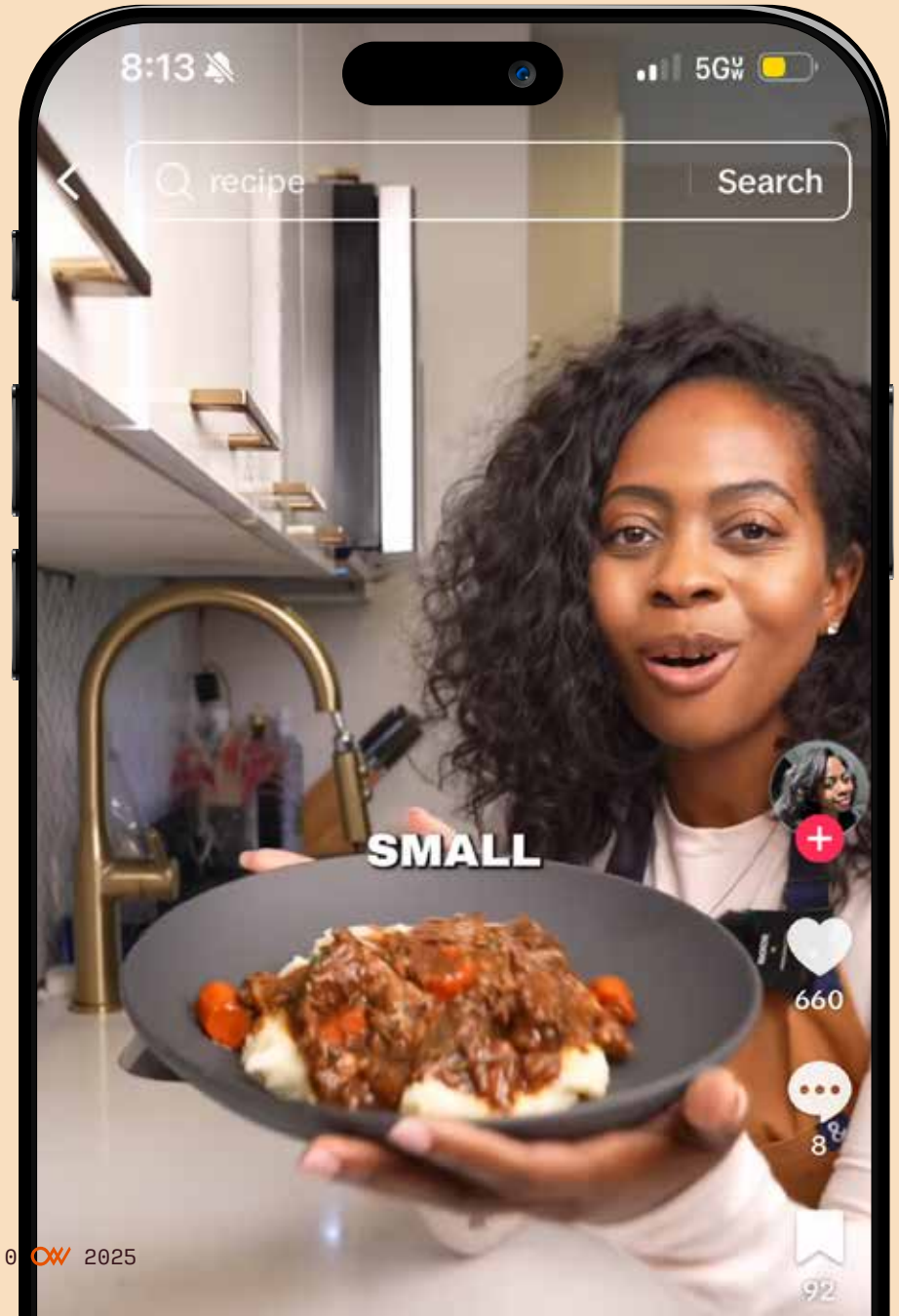

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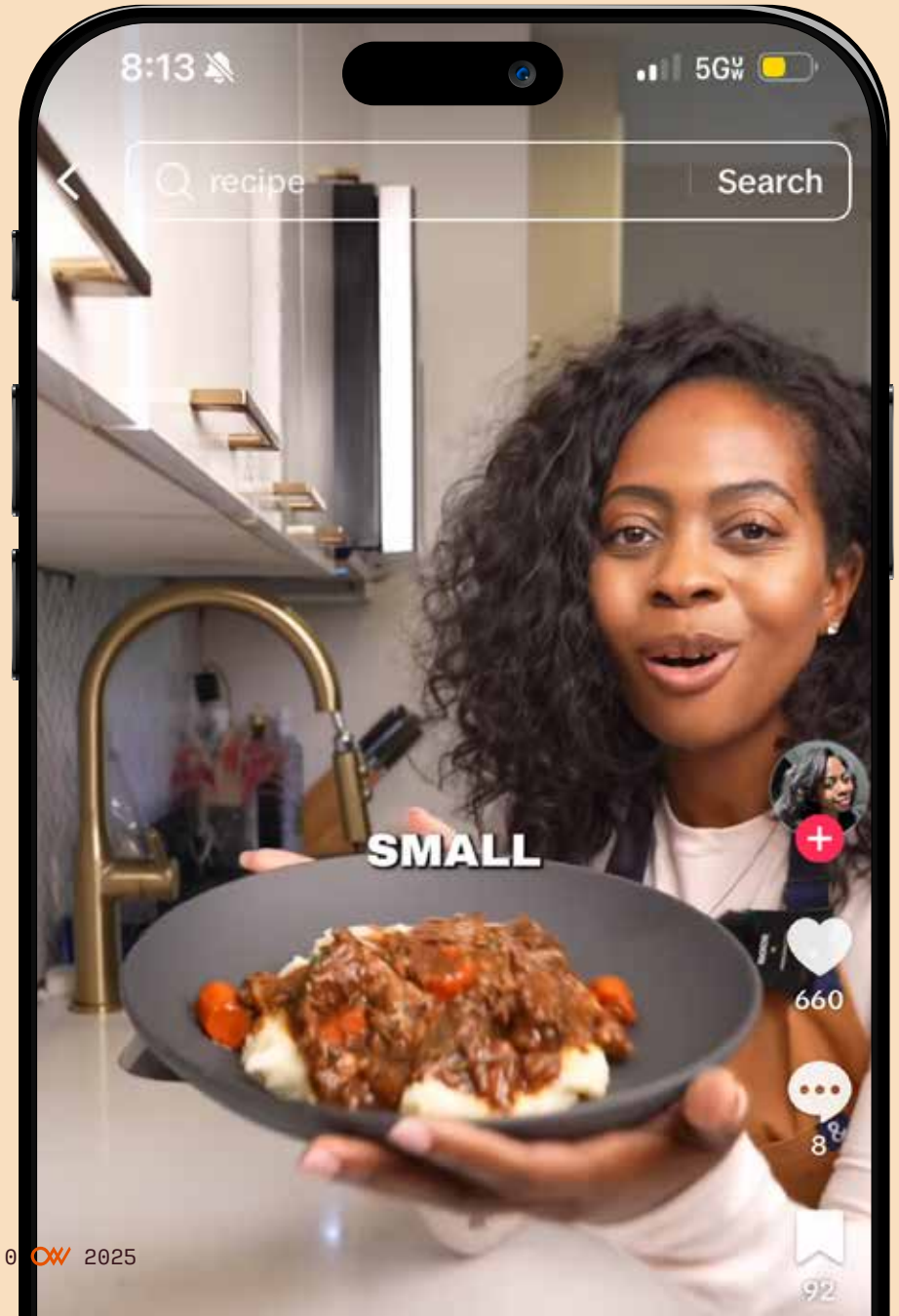


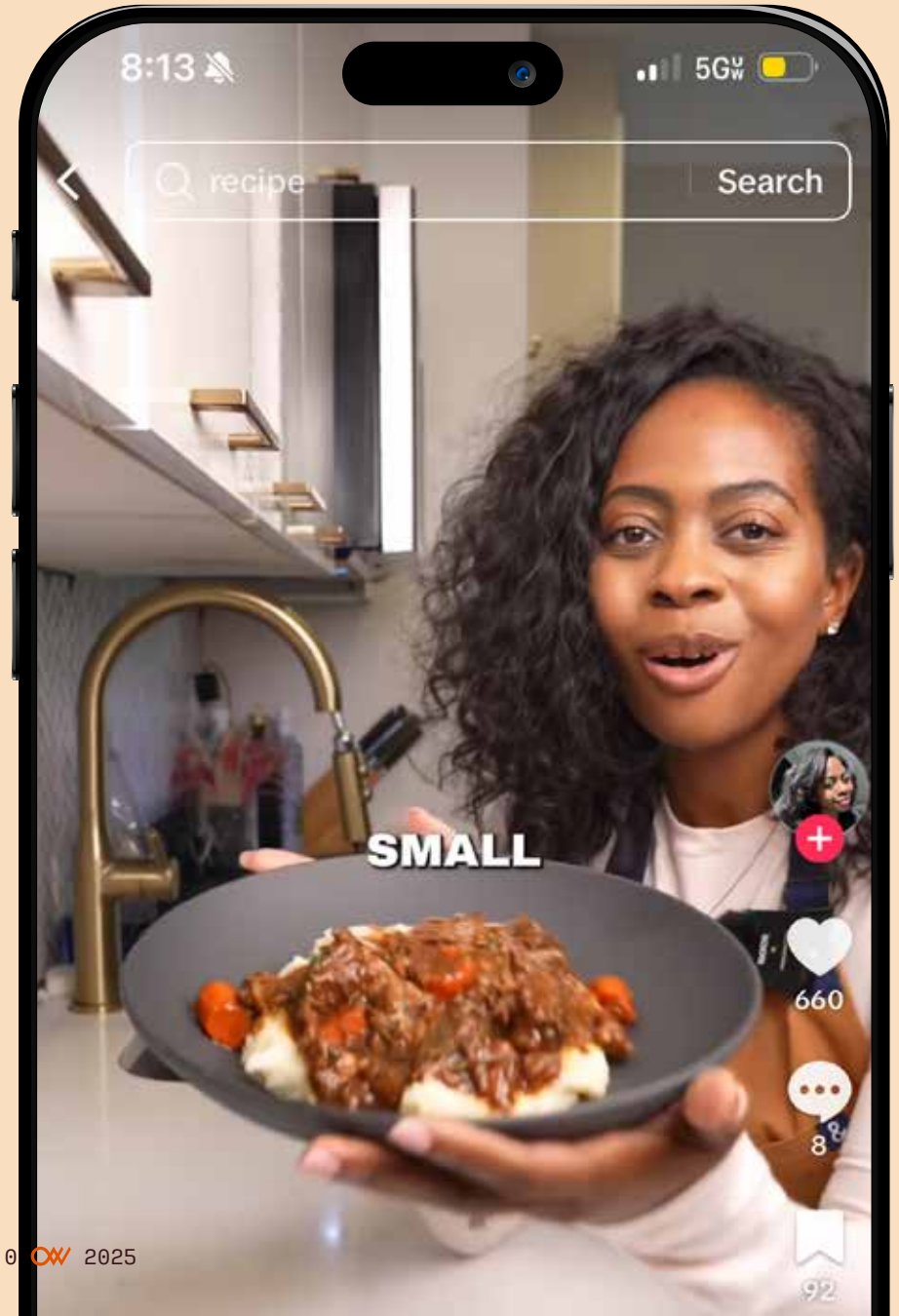
AUGUST

@THERES.FOOD.AT.HOME

RELATABLE?

PREMIUM?

BRAND
DEEP DIVE?



AUGUST

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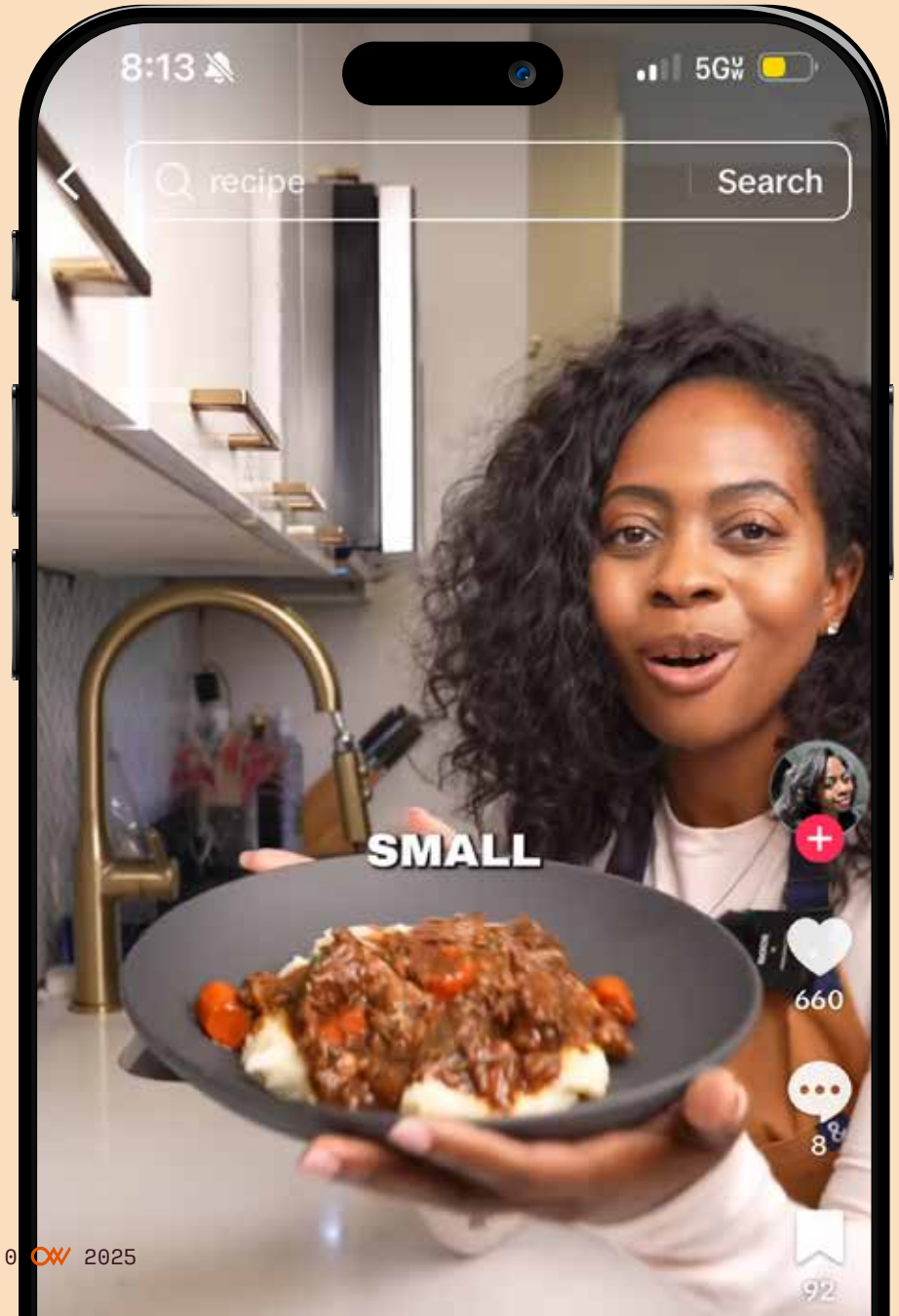


AUGUST

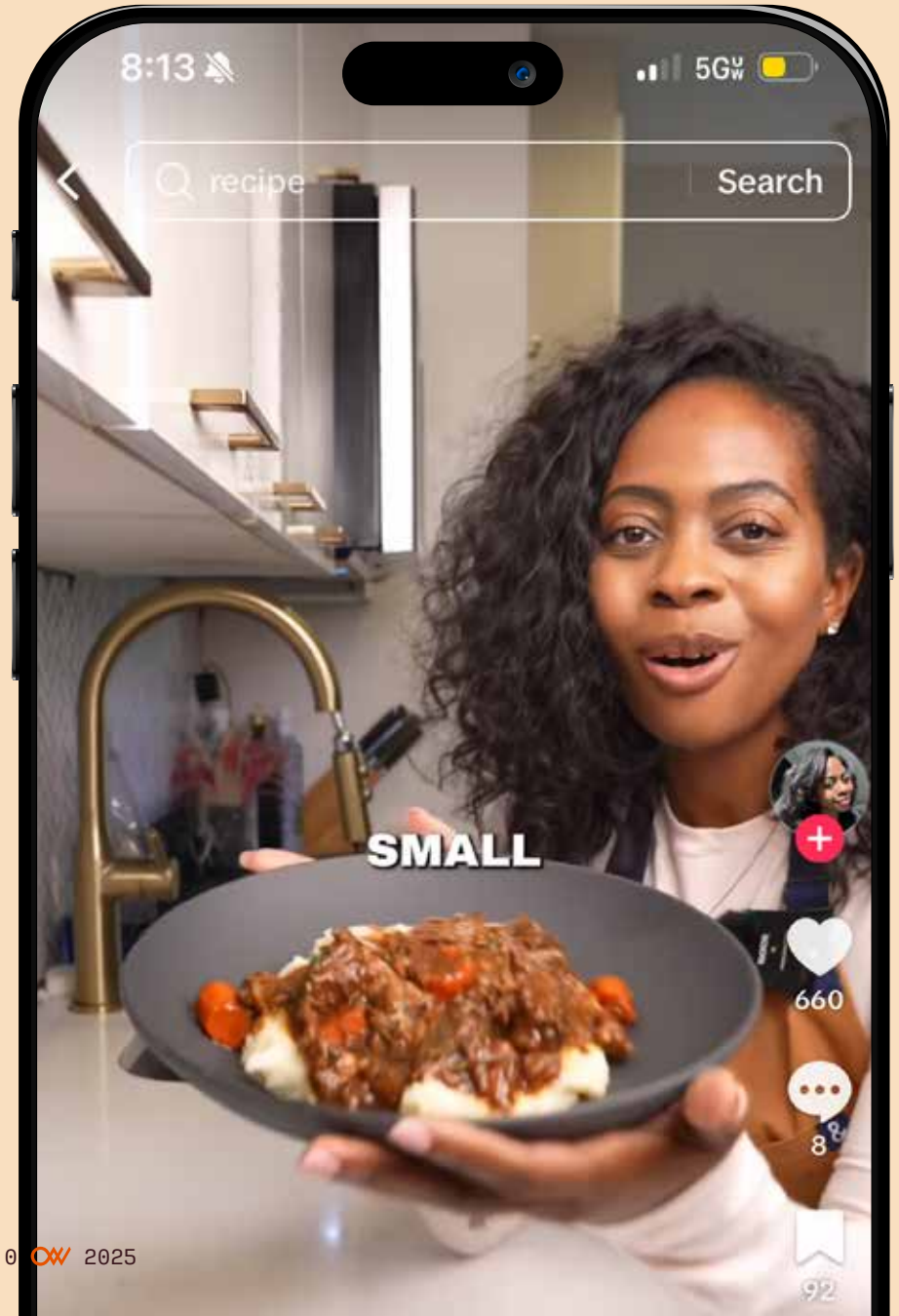
@THERES.FOOD.AT.HOME

RELATABLE?

PREMIUM?

BRAND DEEP DIVE?

IN-STORE?



AUGUST

@THERES.FOOD.AT.HOME

RELATABLE?

PREMIUM?

BRAND DEEP DIVE?

IN-STORE?


~~YES~~
SUP, CHEF.


MEET
ALEX
DISPENCE
(AKA @SUPCHEF)

BRANDS RING THE REGISTER. AGAIN AND AGAIN.

QUESTIONS?

THANK YOU!

GET THE DECK.