Hartman GROUP

Food Sourcing in America 2025

Fragmentation and Focus

What a diversifying landscape of demand means for your business

Marketing smartly to today's grocery shopper is tricky business. Food retailing represents a large, trillion-dollar sector made up of thousands of products and brands, each subject to their own dynamic of short- and long-term trends. Yet food sourcing remains a culturally meaningful activity shaped by distinct challenges, preferences and identities. In the wake of recent disruptions, challenges are compounded by economic forces further influencing souring behaviors.

Despite challenges, the diversity of stores the average shopper uses has grown dramatically over the past 8 years. Much of this new diversity comes from expanded usage of Mass for groceries. Meanwhile, Grocery's dominance as primary channel has fallen, especially among younger shoppers with Gen Z (29%) shopping Grocery significantly less than Boomers (52%).

Food Sourcing in America: Fragmentation and Focus tracks food shoppers' changing behaviors and preferences, exploring the underlying causes and subsequent implications of fragmentation. The report identifies where food retailers and food producers should focus their efforts in this diversifying landscape of demand.

Report published: June 30, 2025
Report length: 111 slides
Format: PowerPoint, PDF and Excel data tables

Food Sourcing in America: Fragmentation and Focus reveals how food shoppers build and continue to refine their own shopping skills and resources to adapt to their changing needs—offering strategic guidance and a proprietary shopper segmentation to navigate this evolving landscape.

The report offers targeted recommendations for retailers, food service and national and private brands, including detailed channel and retailer scorecards to inform your strategy.

Table of contents:

Learn how to leverage shopper segments to signal diversification across a store mix

58%
of Club shoppers were highly satisfied with their last trip

48%
of shoppers say they would visit a new store for a better selection of fresh produce

25%
of consumers (net) say they learn about new products via social media

44% Gen Z

34% Millennials

Consumers of all shopper orientations want to diversify—not consolidate—their mix of stores. Understand why with a comprehensive segmentation details.

Leverage Hartman Group's Shopper Segmentation to uncover which "shopping styles" five shopper segments use to manage their store mixes: **Routine**, **ROI**, **Reliability**, **Reactivity**, and **Renewal**. This new segmentation helps illuminate possibilities and challenges for retailers in attracting and retaining shoppers, visits and food dollars.

Enhance your understanding of shopping fragmentation and focus by exploring:

- What types of stores shoppers use for food today and how this has changed over time
- How shoppers believe stores vary in their availability and selection of merchandise
- How and where food service competes with retail alternatives, such as fresh prepared
- How the rise of online shopping has altered the pathway to product discovery and purchase
- What drives trip satisfaction at the store level
- Where shoppers spend the most and why
- Who shops multiple stores and the main drivers for multi-store shopping

Stand out by understanding the cultural drivers behind ongoing fragmentation of food demand and how to leverage this for distinction and growth

Hybrid work

- Adults commute to work far less frequently than before 2020, reducing spontaneous store visits
- Trips among hybrid workers are now likely to be divided differently among stores, and these stores now serve a growing number of hybrid workers whose daily routine varies across the week

25%

of adults (with tele-workable jobs) work from home some of the time

TikTok as a search engine

- Shoppers learn about food and share ideas about food through visual media, with younger consumers leading a move into video-centric social media as an everyday way to obtain and share ideas about cooking and shopping
- While fewer than half (41%) of adults say they have ever used TikTok for search, this number jumps to two-thirds (64%) among Gen Z, and almost 10% of Gen Z say they prefer it to text-based, Google-like search

41%

of adults looked for new recipes when using TikTok as a search engine.

Sourcing food is fraught yet celebrated

- Shoppers view food price inflation as burdensome yet continue to say they enjoy food shopping
- With heightened worries about prices for food at the store, the fact that many food shoppers continue to consider shopping a labor of love rather than a burden suggests that food shopping is more complicated than simply household work

7%

of consumers would prefer not to grocery shop if they didn't have to

Gain powerful insights (qualitative and quantitative) with actionable guidance —without the cost or time of custom research

Robust integrated methodology

Quantitative: Online national survey fielded April 27-May 1, 2025, n=2,282 U.S. adult primary shoppers aged 18-79. Margin of Error (MOE) ±2.1 pts at 95% confidence level.

Qualitative: Digital ethnographies: n=14 participants. Week-long immersive engagement (journaling, prompts, photos and videos) via asynchronous virtual platform. Follow-up in-depth interviews: n=7 selected from digital ethnography participants for 60-minute 1-on-1 interviews.

Turning insights into action: Food Sourcing Activation Sessions

A customized activation session helps clients take informed next steps based on insights from the *Food Sourcing in America 2025* report.

Please contact Melissa Abbott for more details or an example of a session agenda: melissa@hartman-group.com.

Report published June 30, 2025

Report price: $15,000

The in-depth PowerPoint report includes an executive summary, implications, strategic recommendations, a complete analysis of relevant data supported by robust charts and visuals, plus comprehensive channel (9 total) and retailer (15 total) scorecards.

Accompanying the report are detailed Excel data tables, allowing for flexible analysis with key demographic breakdowns.

To reserve your copy today, contact Melissa Abbott:

melissa@hartman-group.com

ABOUT HARTMAN GROUP

Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients. Since 1989, Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deeply studying trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, identifying unique opportunities and winning strategies for our clients.

3150 Richards Road, Ste. 200 Bellevue, WA 98005
Tel (425) 452 0818

www.hartman-group.com