



# THE NEW GROCERY BALANCING ACT

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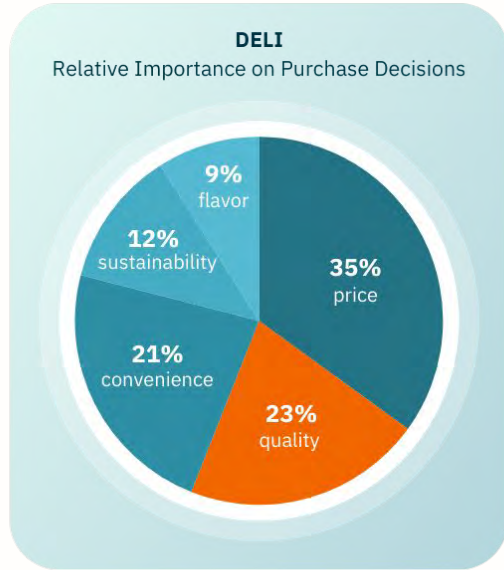
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## Quantitative data gives us the “What”



## Qualitative data gives us the “Why”



*I made deep dish pizza from scratch and jazzed it up with deli prosciutto. A good quality prosciutto really elevates the meal.*

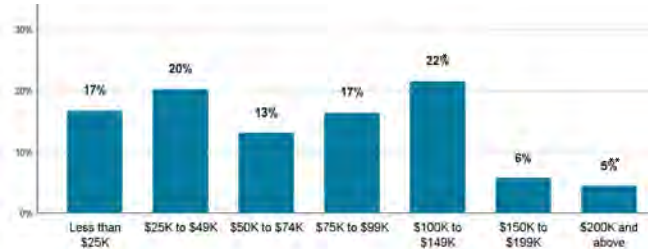
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## Participant qualifications

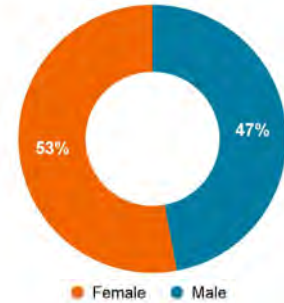
- Purchase bakery items, deli items, prepared foods, or specialty cheeses from a grocery store
- Shop at least once a month in-person at a grocery store with a deli counter and bakery

## Income



\*Sample slightly higher than national average (17%) \*\*Sample lower than national average (12%)

## Gender

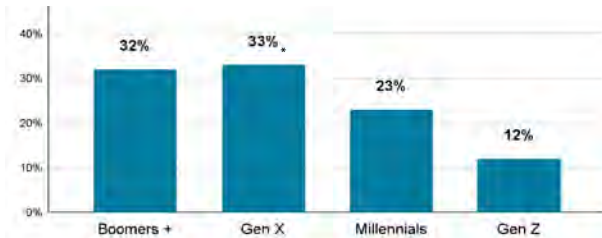


## Shopping frequency

# 76%

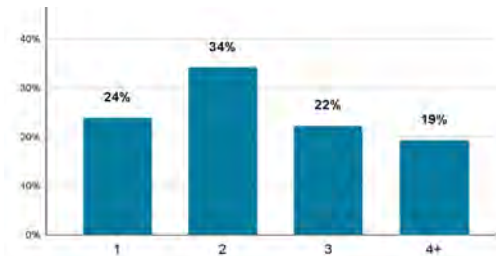
Shop at least weekly

## Generation



\*Sample slightly higher than national average for Gen X (25%)

## Household size



## 2025 TRENDS



### ENDLESS POSSIBILITIES

How can seasonal, limited-edition, or global flavors create urgency and exclusivity to hook shoppers?



### UNIQUELY YOU

How does pop culture influence food choices and move products off the shelves? How can you ride the wave?



### LESS IS MORE

Shoppers say they value sustainability, but how does it really show up at checkout? What tradeoffs are they willing (or not willing!) to make?

### LIVE, LAUGH, LUXURY



Can indulgence drive loyalty by connecting with consumers who crave self-care and culinary experiences?

### CHOP CHOP

What does convenience shopping look like today—and how can you make the most of it?



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# Luxury and Sustainability: what shoppers want in dairy, deli, bakery

## Live, Laugh, Luxury

- While 97% of grocery shoppers treat themselves with food purchases from the grocery store, motivations and purchase patterns for indulgences vary by generation
- A treat doesn't always mean a higher-priced item, especially for women and older shoppers
- 86% like to make their meals feel more luxurious—in different ways. Sometimes the luxury is built from the experience of cooking the food itself
- Treats are almost never *just* about indulgence. Shoppers are more likely to buy a luxury food item if there is a logical justification or dual purpose for their emotional decision (e.g., convenience, less food waste, elevating a meal, making a health goal seem achievable, etc.)

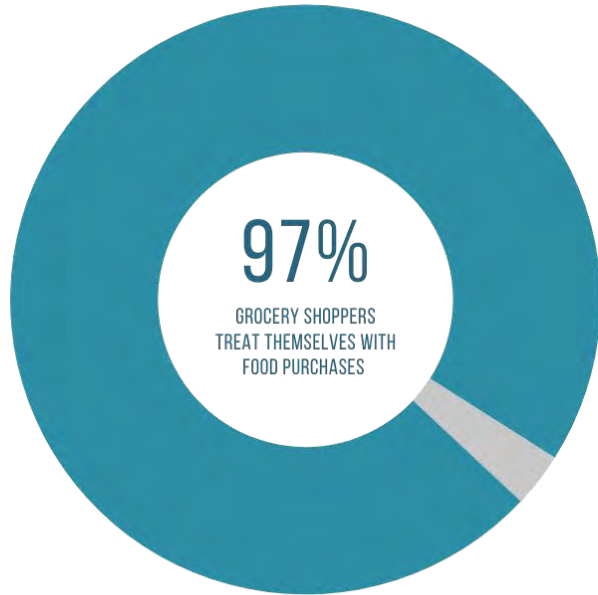
## Less is more

- Approximately 15% of shopper say they prioritize sustainability, but many really don't know what it means
- Decision-making priorities do overlap with many sustainability ideals that are reasons shoppers buy—like avoiding food waste, using food in multiple recipes, or keeping food fresh longer
- Focus on these overlapping desires, such as avoiding food waste and choosing foods that have increased health benefits



# Live, Laugh, Luxury: What is luxury to grocery shoppers?





Which of the following are you most likely to buy as a way to treat yourself? (select up to 3)





# Which demographics are most likely to buy bakery items as treats?

## Baked desserts

### Women

55% buy baked desserts as a treat vs. 38% of men

## Breakfast pastries

### Boomers + older

50% of Boomers and older choose pastries as a treat vs. 36% of Gen Z, 32% Millennials, and 26% Gen X

## Fresh bread

### Online shoppers

48% of those who mostly shop online choose fresh baked bread as a treat when in-store vs. 20% who usually shop in-store



	Bakery desserts (cakes, cookies)	Breakfast pastries	Fresh-baked breads
Mostly in-store	46%	36%	20%
Mostly online	50%	38%	48%
Men	38%	38%	27%
Women	55%	34%	21%
Gen Z	44%	36%	31%
Millennials	46%	32%	26%
Gen X	43%	26%	22%
Boomers + older	52%	50%	22%



# Which demographics are most likely to buy deli items as treats?

## Prepared food

### Gen Z and Millennials

36% of Gen Z and 32% of Millennials buy prepared food for themselves as a treat. These numbers decrease with each older generation.



## Charcuterie meats

### Income > \$100k

Nearly twice as many with income over \$100k purchase deli charcuterie meats as a treat vs. those with income < \$50k

## Dips & spreads

### Gen X

28% of Gen X perceive dips & spreads as treats vs. 17-19% of other generations

	Comfort foods	Prepared foods/ meal kits	Dips & Spreads	Charcuterie meats
Men	39%	28%	18%	25%
Women	46%	22%	24%	16%
Gen Z	33%	36%	19%	25%
Millennials	53%	32%	17%	22%
Gen X	41%	25%	28%	22%
Boomers + older	40%	16%	18%	15%
<b>Income</b>				
<50k	44%	18%	21%	12%
50k-99k	48%	32%	20%	20%
100k-150k	42%	25%	21%	30%
150k or more	25%	28%	28%	28%



# Which demographics are most likely to buy specialty cheese as a treat?

## Millennials

Nearly 1 in 3 Millennials buy specialty cheese to treat themselves, compared to 16-20% for other generations



## Income > \$100k

Over twice as many with income over \$100k purchase specialty cheese as a treat vs. those with income under \$100k

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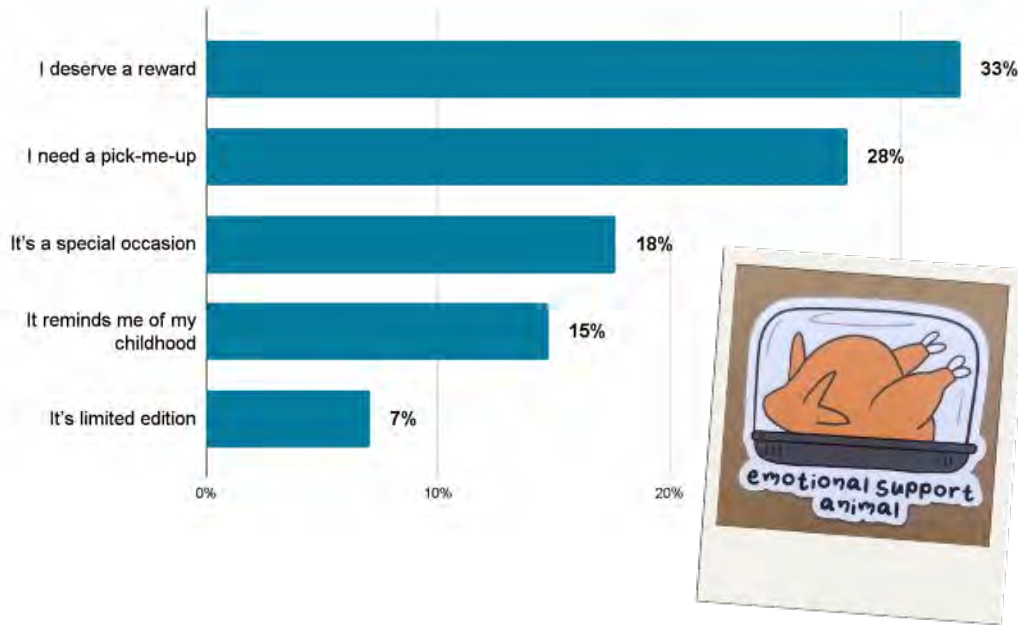
*I can treat myself to wine and cheese on a Tuesday night.*

	Speciality cheese
Gen Z	17%
Millennials	32%
Gen X	16%
Boomers + older	20%
<b>Income</b>	
<50k	15%
50k-99k	16%
100k-150k	30%
150k or more	41%



# Little indulgences are often just because “I deserve a reward”

When I grab myself a special indulgence or treat (sweet or savory) at the grocery store, it's most often because...



# Everyone can agree that they deserve a reward, but for different reasons



**Of Gen X and Boomers buy treats because they need a pick-me-up**



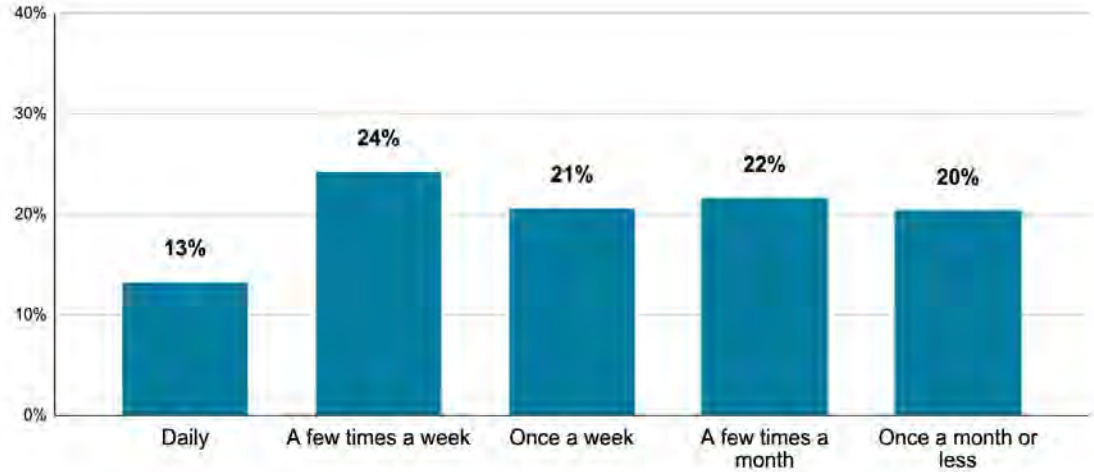
**Of Gen Z and Millennials buy treats because it reminds them of childhood**



# Nearly 3 in 5 shoppers indulge their taste buds at least once a week



How often do you purchase foods that feel like an indulgence or treat?





## Younger shoppers reward themselves more frequently



**of Gen Z + Millennials buy  
treats/indulgences  
once a week or more**

(compared to only 61% Gen X  
and 26% of Boomers+)



**of Boomers + older buy  
treats/indulgences a  
few times a month or less**

(only 20% of Gen Z + Millennials  
and 41% of Gen X)

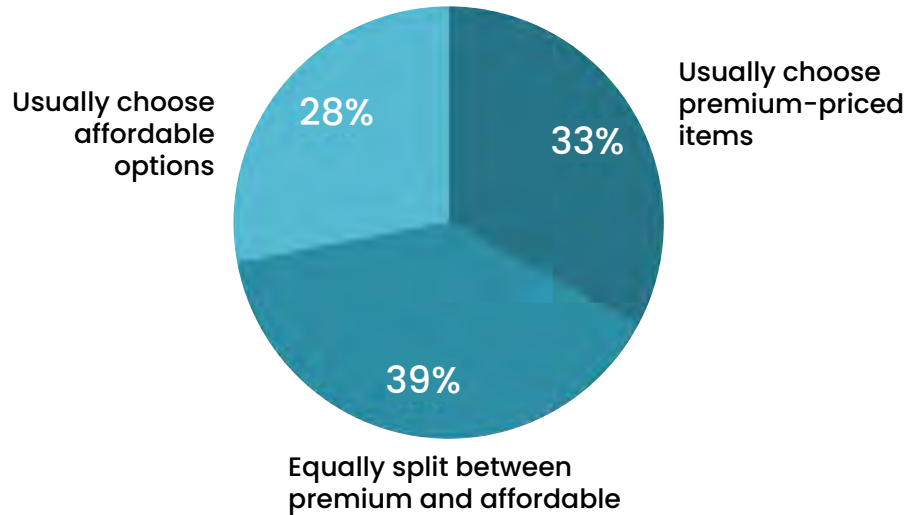


# Price perceptions of indulgences + treats



# A premium treat doesn't have to be a premium price... but it can be!

When treating yourself, how often do you select a higher-priced, premium item (e.g., artisan cheese, gourmet dessert) vs. a more affordable, everyday option?



# Generational divide in price point: younger shoppers prefer high-priced treats

**57%**

Of Gen Z + Millennials buy **premium-priced** products when treating themselves

**51%**

Of Boomers + older shoppers buy **affordable** products when treating themselves



When asked for a photo of a luxury purchase, a 66-year-old participant sent us a picture of a rotisserie chicken.

*It's not the chicken that's seen as a luxury—it's the convenience.*



# Gender divide in price point: men prefer premium pricing; women prefer affordable



”

Expensive unnecessarily... I can find the same or less expensive replacements at a fraction of the cost and the same taste. Why would I buy premium Gouda when normal Gouda tastes the same?

Premium quality means...

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It's from a reputable company known for quality items [like] prepared meat from a local producer rather than mass market.



# Decision-making based on quality





# The quiet power of quality

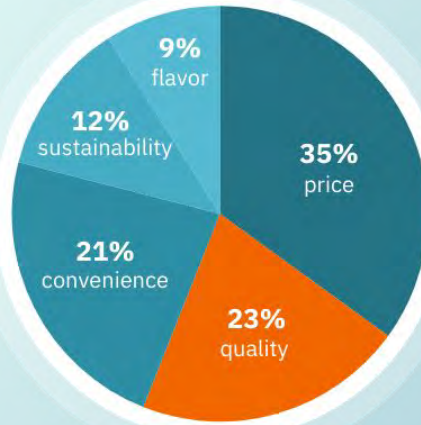
## DAIRY

Relative Importance on Purchase Decisions



## DELI

Relative Importance on Purchase Decisions



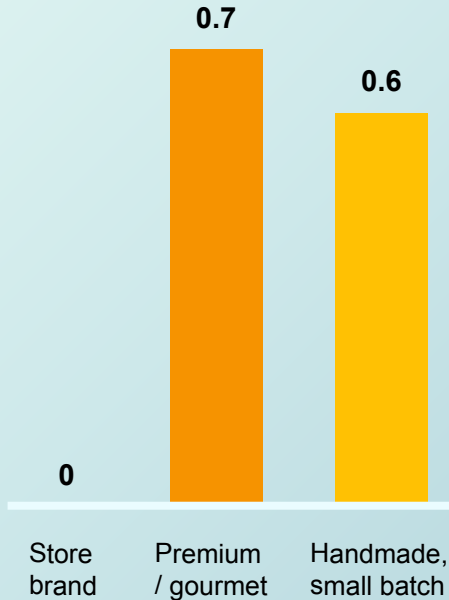
## BAKERY

Relative Importance on Purchase Decisions



# Premium positioning in specialty cheese

Relative Preference



And that gourmet quality is often tied to flavors

<https://docs.google.com/file/d/1DGHTrnybax0JTppbqgq7pRLv-QdJg4pQ/preview>



# Premium positioning in the bakery

## Relative Preference



Premium or gourmet quality to me indicates something **fresh made** that is **above and beyond the basic varieties** of baked goods available... I would consider something like a multipack of white burger buns to be basic, but the egg onion rolls that I selected today to be a premium option, because the added flavors make them much tastier and a really special treat



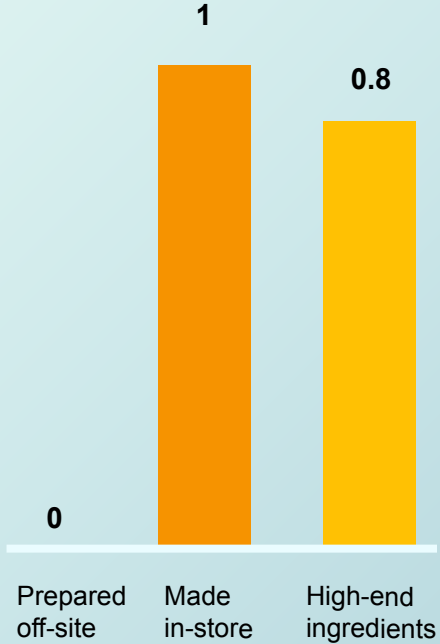
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A really good loaf of bread makes a meal special.



# Quality drives 23% of deli purchases—second only to price

Relative Preference



“Made right here” or “made from scratch” signage signals freshness.

Tasty, fresh vegetables on the side upgrades a meal.

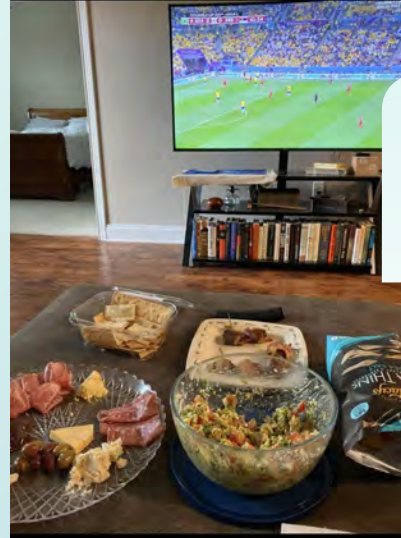




# High-quality ingredients bring texture and surprise



*Cheese can bring a creaminess, richness, and decadence to a meal.*



*I made a charcuterie board, bacon wrapped dates stuffed with goat cheese and a really good tomato avocado dip on a random Saturday. Felt special.*



It's rarely *just* about indulgence though.



**Treat myself**



**Meal prep convenience**



**Less food waste**



**Elevates meal**



**Health goal**



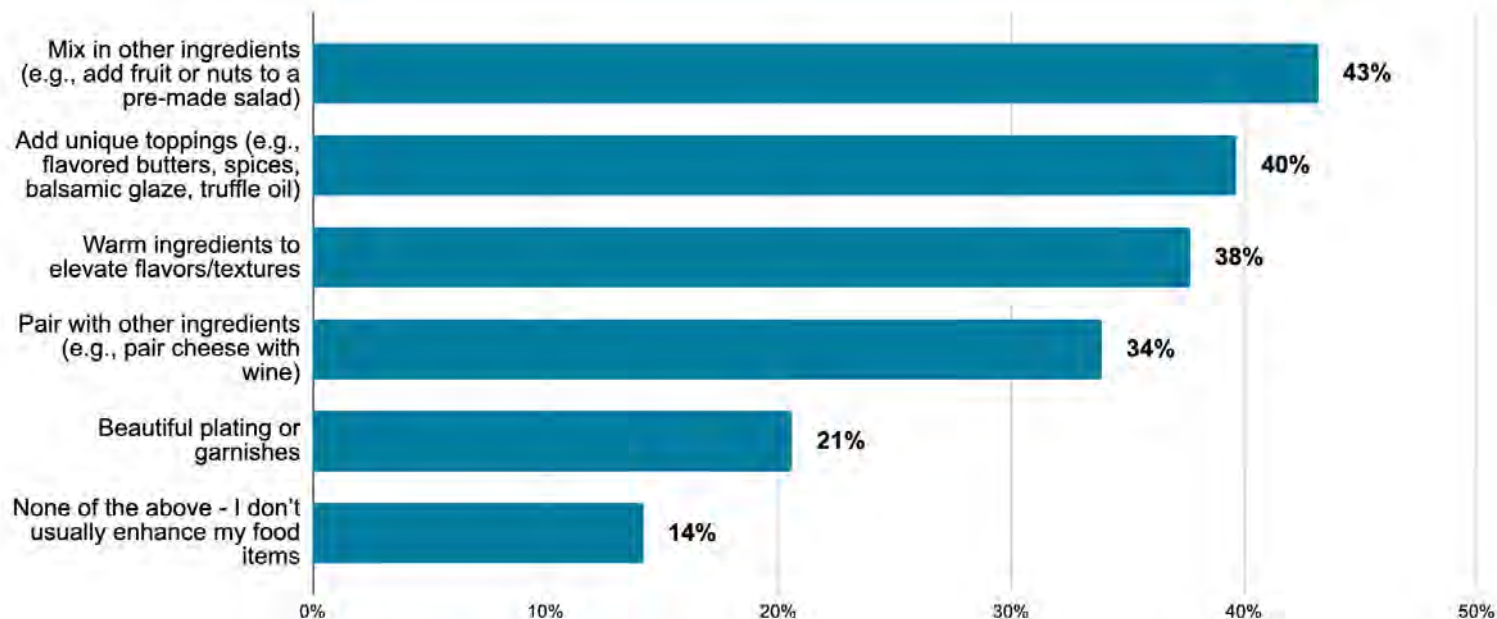


86% elevate home-cooked meals  
with grocery purchases

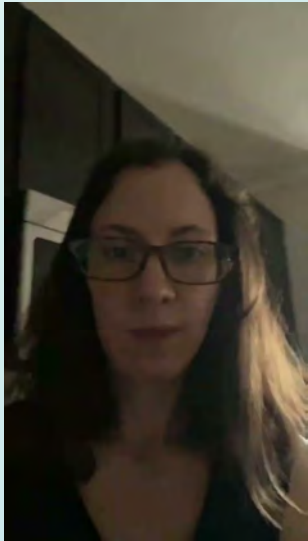


# 86% enhance their food to make it feel more luxurious

How do you enhance the food you buy to make it feel more luxurious? (select all that apply)



# Making premade meals more luxurious



## **Adding Unique Flavors**

This mom treats herself to her favorite avocado sauce, to elevate her “kid approved” meals.



## **Adding Sides**

She likes to add fresh bread from the bakery to add another element to the pre-made salads she bought.



## **Upgrading Pasta Night**

Have suggestions ready of what cheese you can pair with prepared options.



# Sometimes it's the time and care in preparation that makes food items feel luxury



*It was one of the first dishes I've ever made. It was special to me because it made me realize I was a good cook because the dish was tasty.*

*It was my first attempt at making sushi. I put my heart into the meal.*



*It was homemade sourdough pizza crust with homemade sauce and deli mozzarella freshly grated. It was a labor of love and utterly delicious.*





## Over 1 in 3 (38%) Millennials prioritize photo-ready plating



# Less is more personas: die hards, virtue signalers, and the confused





# Sustainability makes up 12-13% of grocery buying decisions

## BAKERY

Relative Importance on Purchase Decisions



## DELI

Relative Importance on Purchase Decisions



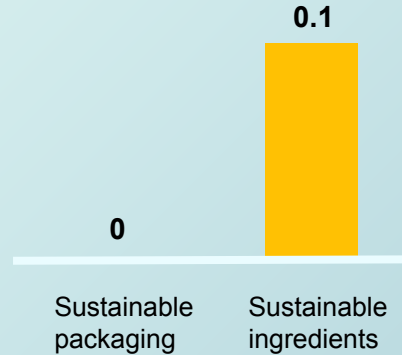
# Sustainability drives 13% of purchase decisions in the bakery



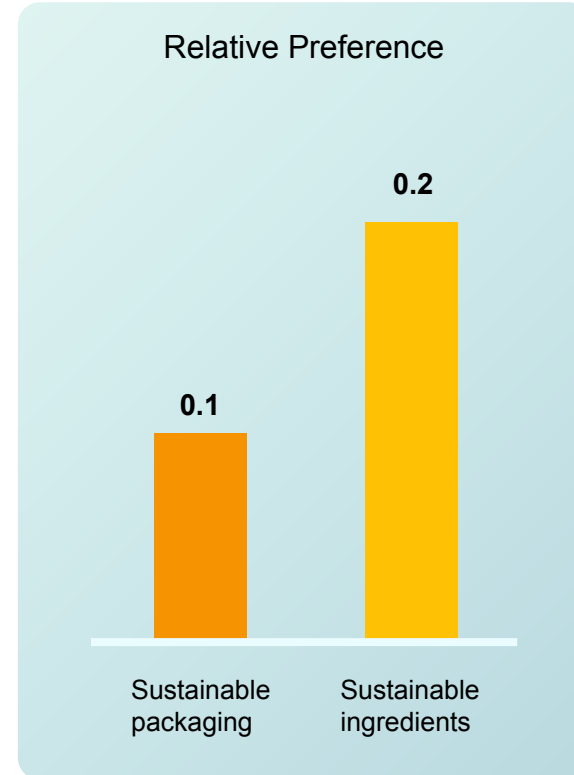
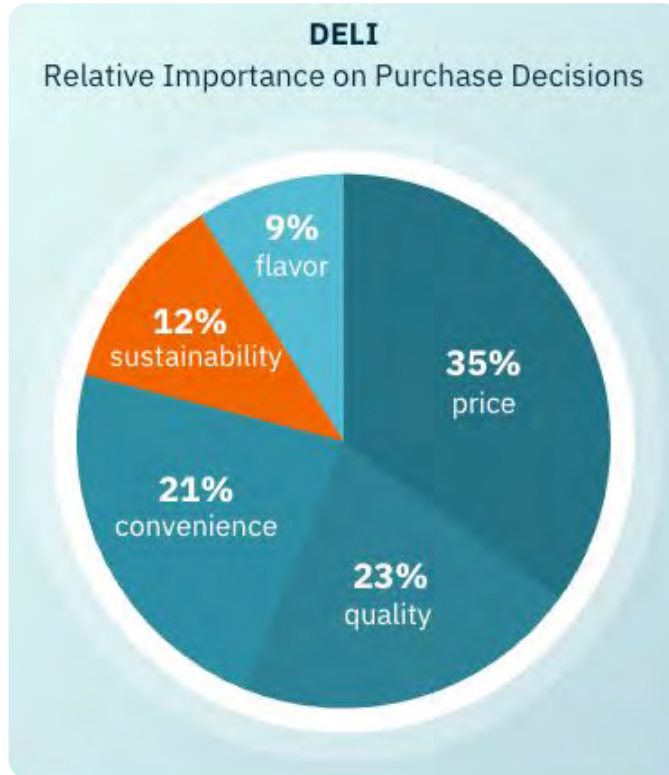
## The ingredients

Looking for key ingredients, like organic or non-GMO is a large motivator for some.

## Relative Preference



# Sustainability drives 12% of deli purchases



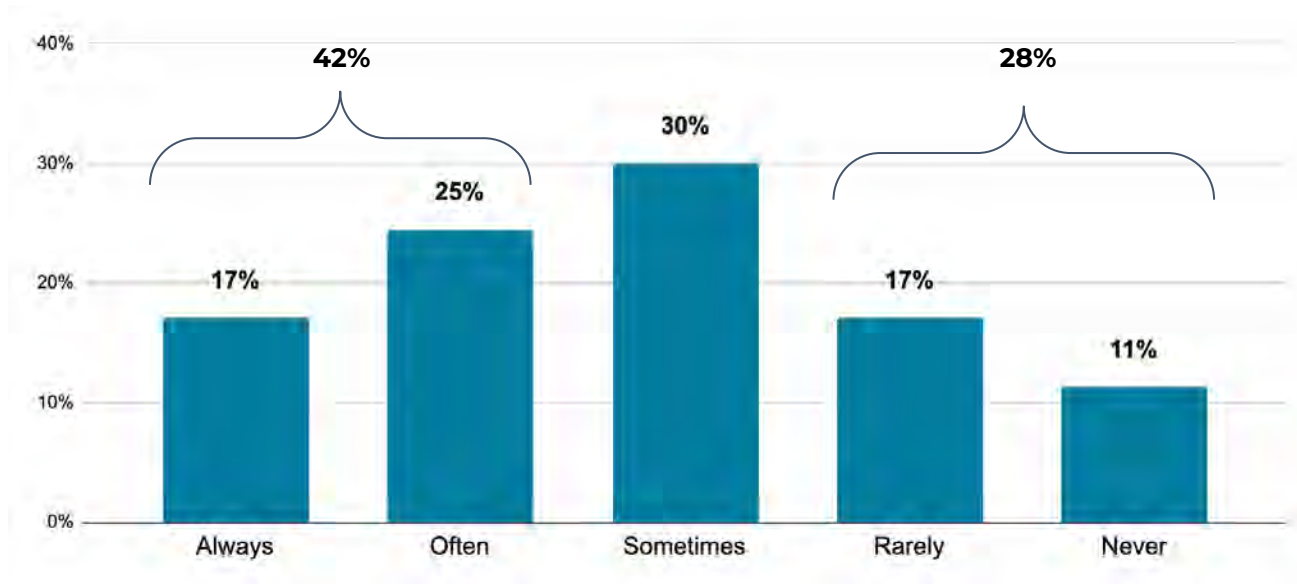
# Sustainability came in last place compared to other popular factors

**What do you value most when shopping for groceries?  
(Rank options with 1=Most Important, 5=Least Important)**

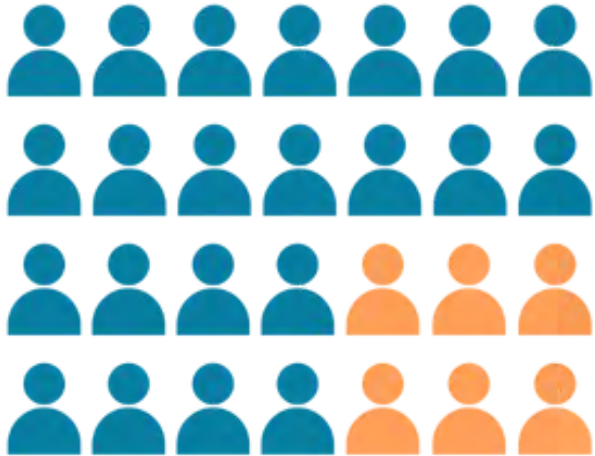
	Overall Rank	% of participants who ranked each choice in their top 2
Quality of food	1	72%
Saving money	2	54%
Flavor variety/uniqueness	3	36%
Convenience (e.g., ready-to-eat, easy prep)	4	24%
Sustainability (e.g., sustainable packaging, locally sourced)	5	14%



How often do you purchase items at the grocery store because of their sustainability features?



## Of 111 shoppers



Only 18 said they prioritized sustainability over convenience...

Of these 18, only 10 knew what sustainability was.



# Shoppers say they support sustainability, but this doesn't translate to trendy purchases



But only....





# Three audiences open to sustainability messaging

**Die-hards**



**Virtue Signalers**

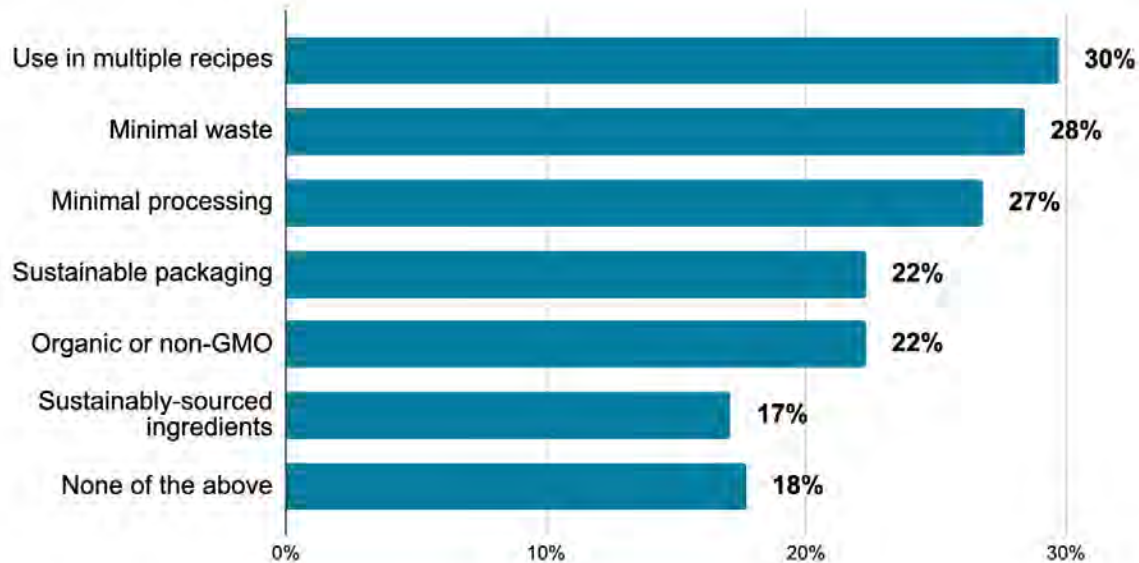


**Freshness Seekers**



# Top of mind: food waste + convenience. But older shoppers are least likely to care.

## Which sustainability factors influence your purchases? (select 1-2)



	None
Gen Z	8%
Millennials	10%
Gen X	14%
Boomers + older	31%



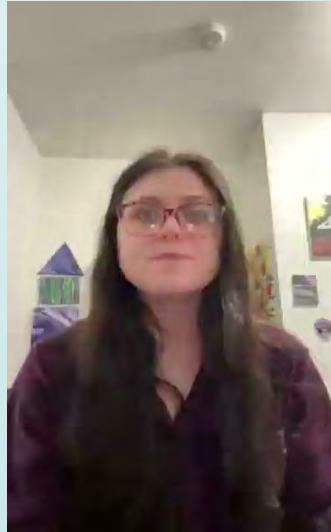
# Fighting food waste

## Minimal waste



Starving kids in Africa...  
or kids closer to home

## Freezer



They fight food waste by throwing extra in the freezer. Mark which products "freeze great!" and give defrosting instructions to improve their experience.

## Multiple Recipes



They use items (especially rotisserie chicken) in multiple recipes, to make to simplify food prep and to be able to use it all up.



# To die hards, sustainability = minimizing waste + sourcing + eco-friendly packaging + less microplastics

”

*To me, sustainability means the impact that it has on the environment in the **manufacturing and consumption process**... So sustainability as far as the environment is I like to make sure that my cheeses are made from **quality sources** and that have, if possible, **grass fed or antibiotic free** cows. If I see that **on the label** and it always catches my attention.*

”

*Packaging that is easily **recyclable**, can be **broken down to smaller quantities for freezing**, minimizes **microplastics**, reduces overall **waste***

”

*Making choices that reduce **waste**, support **local** farms, and **minimize environmental impact**.*

”

*It's means getting the things I need with the **least amount of impact on the environment**.*

”

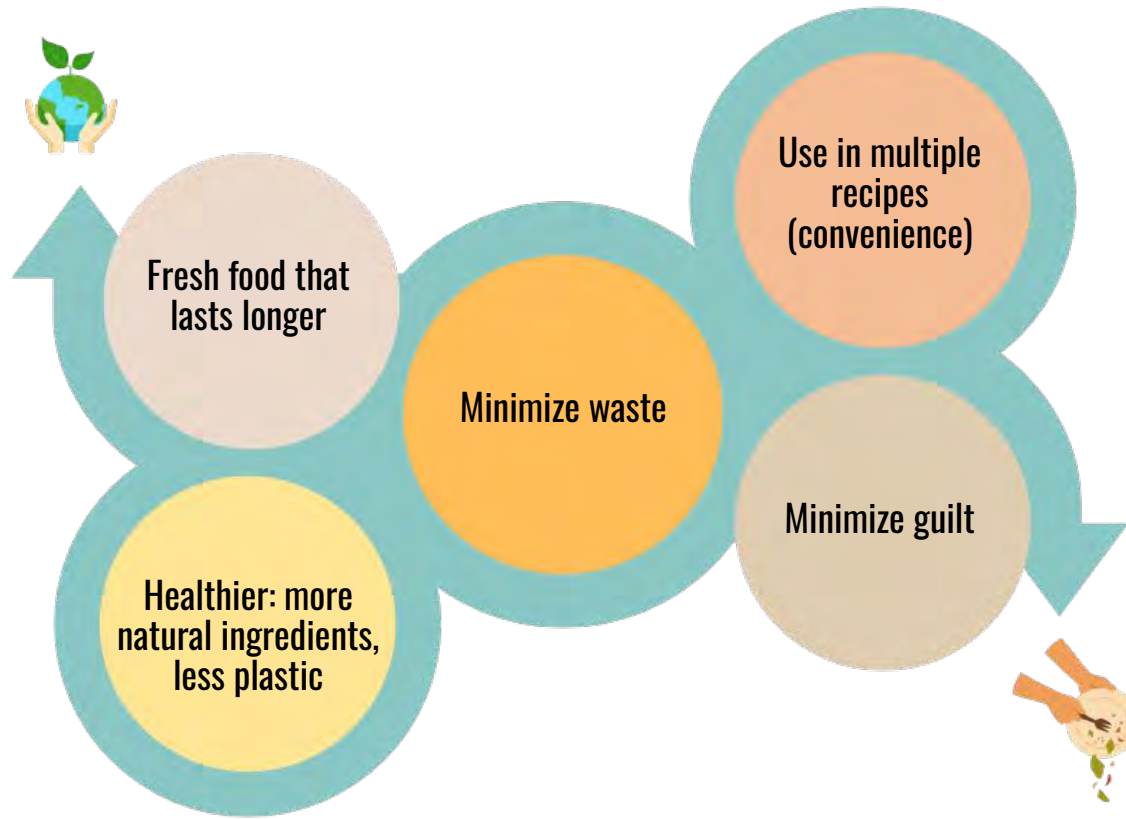
*Sustainability to me means encouraging **eco-friendliness** or explaining where products were **sourced** from*

”

*Sustainability in the grocery store means taking efforts to **reduce environmental impacts** through its products, **packaging, sourcing**, etc*



# Catch shoppers where their other values overlap with protecting the Earth





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Learning to make pizza in Italy



Naan air fryer pizzas at home!