



# Food Sourcing in America 2022

**A Hartman Group Syndicated Research Report**

**Published: October 2022  
Market Coverage: U.S. Market**



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## Food Sourcing in America 2022

Food Sourcing in America examines how consumers traverse today's hybrid world of in-store and online grocery shopping and a changing foodservice landscape to feed their families and the cultural shifts that are impacting aspirations and behaviors.

**Hartman Group Syndicated Report Published: October 2022 | Report length: 107 pages |  
Market coverage: U.S. Market**

Grounded in primary quantitative and qualitative research, the report offers a comprehensive consumer-centered perspective on key topics, motivations, tensions and drivers associated with food shopping and food procurement, both today and in the future.

### What's Included?

- Executive summary
- General report (PowerPoint and PDF)
- Demographic data tables (Excel)

### Explore the Report

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#### Methodology

Integrated qualitative and quantitative methodologies.

- **Quantitative:** Online national survey July 20–August 4, 2022, n = 2,279 U.S. adult primary shoppers aged 18–76 (MOE ± 2.0% at 95% confidence level). Respondents recruited as a nationally representative sample and balanced by age, gender, division, income, race/ethnicity, and presence of children to match the 2022 Census Bureau Current Population Survey
- **Qualitative:** Digital Ethnographies: N=16 participants. Week-long immersive engagement via asynchronous virtual platform. Topics included: discovery, planning, online and in-person shopping habits and preferences, cost-saving strategies, use of prepared foods and foodservice
- **Qualitative:** N=10 selected from digital ethnography participants. Hour-long interview focused on delving deeper into responses from the digital ethnography



# Food Sourcing in America 2022

## Executive Summary

### Chapter One: Cultural/Social Context of Shopping

*Cultural drivers are constantly shifting in modern society, informing and shaping food lives, including how we shop*

Cultural drivers that inform and shape food lives (analysis)

Current events impacting consumers food sourcing decisions and behaviors (analysis)

Chapter One summary

### Chapter Two: Planning & Discovery

*Planning for shopping persists, and consumers rely on traditional practices as well as newer digital tools*

Planning (women vs. men)(chart)

In-store discovery vs. online discovery (charts)

Online discovery of new products and restaurants (analysis)

General purchase influencers (charts)

Chapter Two summary

### Chapter Three: Food Sourcing Dynamics

*Procuring foods and beverages is a complex web of retail and foodservice options that shoppers navigate in person, online, or both, on any given journey*

Food procurement journeys (analysis)

Shopping priorities (in-person, hybrid, online) (chart)

Hybrid shoppers (chart)

Post-COVID in-person shopping trips (charts)

Obstacles to shopping (chart)

Checkout technologies (analysis)

Growth and use of online grocery shopping (charts)



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### Chapter Three: Food Sourcing Dynamics (continued)

- Portion of food/groceries purchased online (chart)
- Barriers to online grocery shopping (chart)
- Type of online grocery shopping used (chart)
- Shopper perceptions and expectations of delivery and click-and-collect (chart)
- Online meal services (and meal kits) used in P3M (chart)
- Frequency of dining out/ordering takeout or delivery (restaurants) (chart)
- Comparison of use of food retail vs restaurants (chart)
- Chapter Three summary

### Chapter Four: Channel Shifting

*Channel is not a meaningful distinction for consumers*

- Channel Engagement (chart)
- Channels shopped in past 30 days (Mass vs Grocery) (charts)
- Primary role of channel (chart)
- Satisfaction with trip/order by channel (chart)
- Store attributes performance and drivers of trip satisfaction (chart)
- Role of shopping enjoyment and selection and channel choice (chart)
- Drivers of trip satisfaction, trust, recommendation (chart)
- Product selection performance and drivers of trip satisfaction (chart)
- Product categories/types as drivers of shopping experience (chart)
- Practical category needs and drivers of satisfaction, trust, recommendation (chart)
- Chapter Four summary



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## Chapter Five: Inflation Impacts

*While inflation impacts everyone, those at lower income levels are the ones who have had to rethink how they live, what they buy, and how they shop*

Observed rising prices and impact on grocery purchases (charts)

Budgets and behavior (analysis)

Gas price impact on the way people shop (chart)

Changes made to accommodations in order to eat what is desired (chart)

Reliance on store brands (chart)

Shopping sales, couponing, and BOGOs strategies for budget-conscious consumers (analysis)

Use of loyalty programs (analysis)

Shopping methods as a cost-saving strategy (including online) (analysis)

Sensitivity to price increases in specific categories: Meat/Seafood Spotlight (chart)

Pay-later services (analysis)

Food industry profits and consumer response (analysis)

Chapter Five summary

## Chapter Six: The Future of Shopping —Implications & Recommendations

## Chapter Seven: Channel & Retailer Scorecards

### Channel Profile: Mass

Retailer Profile: Walmart

Retailer Profile: Target

### Channel Profile: Grocery

Retailer Profile: Kroger

Retailer Profile: Albertsons

Retailer Profile: Ahold Delhaize



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## Chapter Seven: Channel & Retailer Scorecards (continued)

### **Channel Profile: Dollar**

Retailer Profile: Dollar General

Retailer Profile: Dollar Tree / Family Dollar

### **Channel Profile: Club**

Retailer Profile: Costco

Retailer Profile: Sam's Club

### **Channel Profile: Discount**

Retailer Profile: Aldi

### **Channel Profile: Natural/Specialty**

Retailer Profile: Trader Joe's

Retailer Profile: Whole Foods Market

### **Channel Profile: Online/DTC**

Retailer Profile: Amazon



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## ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy. Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients.

Since 1989, The 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 deep study of trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, thereby identifying unique opportunities and winning strategies for our clients.

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