

Grocery in 2025: Visitation Trends and Consumer Behavior

Dive into the data to see the trends shaping the grocery space in 2025 and uncover actionable insights for strategic decision-making in the competitive food-at-home market.



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A Study in Resilience

Brick-and-mortar grocery stores face an uncertain market in 2025. Rising food-at-home prices ([eggs](#), anyone?), [declining](#) consumer confidence, and increased competition from discounters, superstores, and online shopping channels all present the segment with significant headwinds. Yet even in the face of these challenges, the sector has demonstrated remarkable resilience – growing its foot traffic and holding onto visit share.

What strategies have helped the segment navigate today’s tough market? And how can industry stakeholders make the most of the opportunities in the current market? This report draws on the latest location intelligence to uncover the trends shaping grocery retail in early 2025 – highlighting insights to help key players make informed, data-driven decisions on store formats, product offerings, and more.

Growth in Aisle One

The grocery segment has experienced nearly uniform positive year-over-year (YoY) growth over the last 12 months. This sustained performance in the face of inflation and other headwinds highlights the underlying strength of the category.



Visits Up, Dwell Time Down

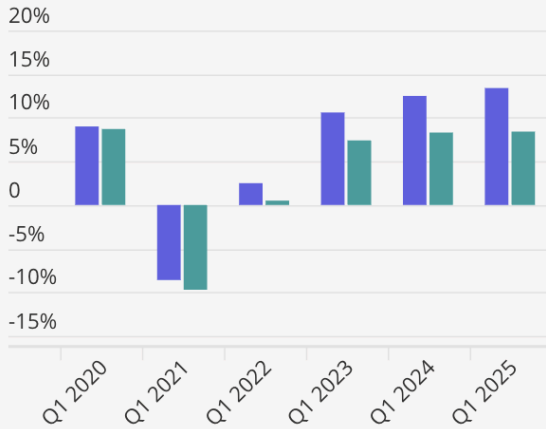
What is driving this growth? Since 2022, the grocery segment has seen consistent overall visit growth that has outpaced increases in visits per location – a sign that chain expansion has played a key role in the category’s success. But the average number of visits to each grocery store has also been on the rise, indicating that the segment continues to expand without cannibalizing existing store traffic.

At the same time, visitor dwell times have been steadily dropping since 2021. This shift appears to reflect a trend towards multiple, shorter trips by inflation-wary consumers eager to avoid large, costly carts or cherry pick deals across various retailers. Many shoppers may also be placing more bulk orders online and supplementing those deliveries with brief in-store stops for additional items as needed.

The bottom line: Shoppers are taking more grocery trips overall each year, but spending less time in-store during each visit. Operators can respond to this trend by optimizing layouts and promoting “grab-and-go” areas for an even more efficient quick-trip experience.

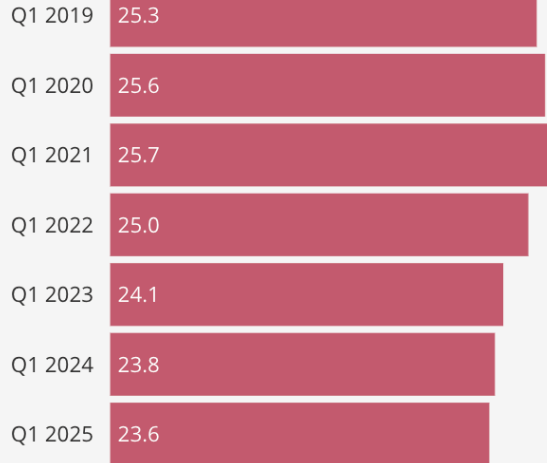
Grocery Foot Traffic Grows While Dwell Time Progressively Decreases

■ Visits ■ Avg. Visits Per Location



Grocery Store Visits Compared to Q1 2019

Download data



Grocery Store Avg. Dwell Time in Minutes

Download data



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Still in Stock

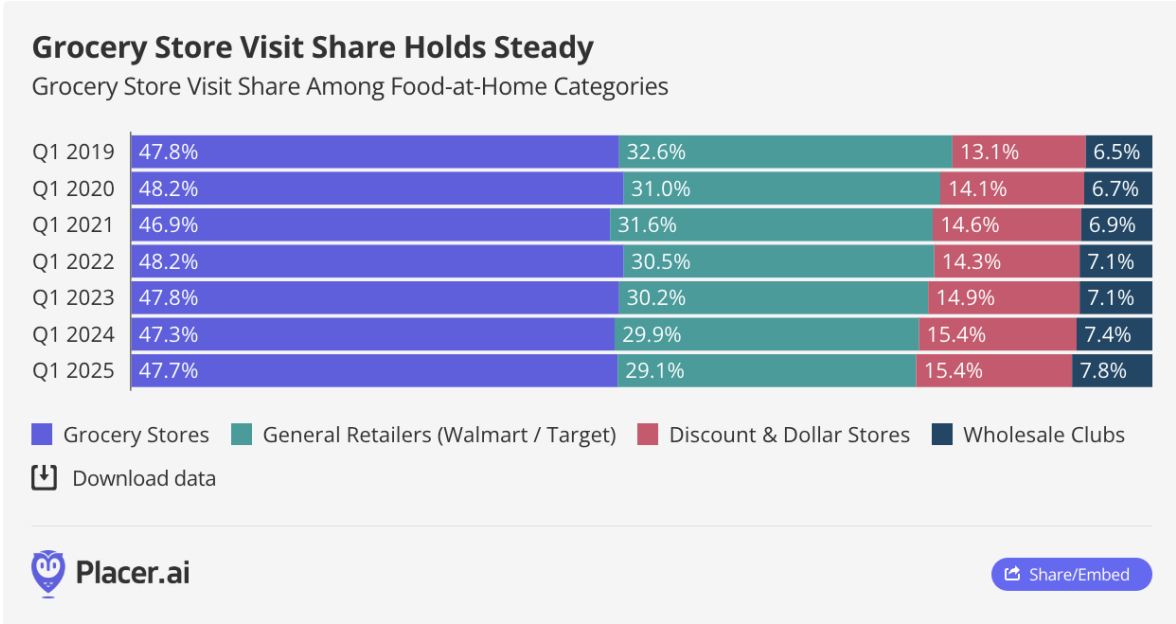
Visit share data also shows that despite fierce competition from discount and dollar stores, wholesalers, and general mass retailers, the grocery segment has steadfastly preserved its share of the overall food-at-home visit pie.

Between Q1 2019 and Q1 2025, wholesale clubs and discount and dollar stores increased their share of total food-at-home visits, gains that have come primarily at the expense of Walmart and Target. Meanwhile, grocery outlets have held firm – despite some fluctuations over the years, their Q1 2019 visit share remained essentially unchanged in Q1 2025.



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So even as consumers flock to alternative food purveyors in search of lower prices, grocery stores aren't losing ground – and on a nationwide level, they remain the biggest player by far in the food-at-home shopping space.



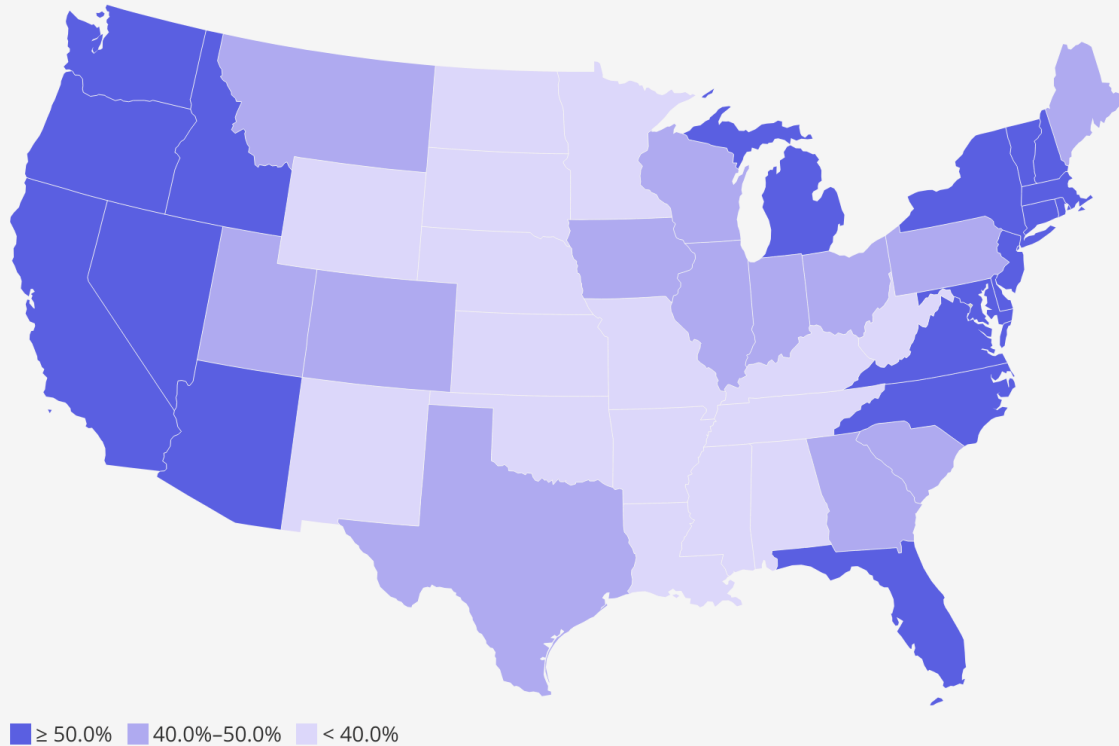
A Coastal Advantage

Still, grocery store visit share varies significantly by region. On the West Coast, in parts of the Northeast, Mid-Atlantic, and Mountain regions, and in Florida and Michigan, grocery stores accounted for the majority of food-at-home visits in Q1 2025. Oregon (61.6%) and Washington (59.6%) led the pack, followed by Massachusetts (59.2%), Vermont (58.5%), and California (57.9%). Meanwhile, in West Virginia, Arkansas, South Dakota, Oklahoma, North Dakota, and Mississippi, less than 30% of food-at-home traffic went to grocery stores, with more shoppers in these regions turning to general mass retailers or discounters.

Grocery store operators in lower-grocery-share regions may choose to focus on price competitiveness and convenient store locations to capture more foot traffic from competitors in the space.

Grocery Stores Draw Highest Share of Food Shopping Visits in Northeast, West Coast, and Florida

Share of Grocery Store Visits From Among Total Visits to Food-at-Home Categories* | Q1 2025



*Analyzed Categories Include General Retailers (Walmart + Target); Discount & Dollar Stores; and Wholesale Clubs. Hover Over Map to See Full Visit Share Breakdown for Each State.



Fresh and Frugal on the Rise

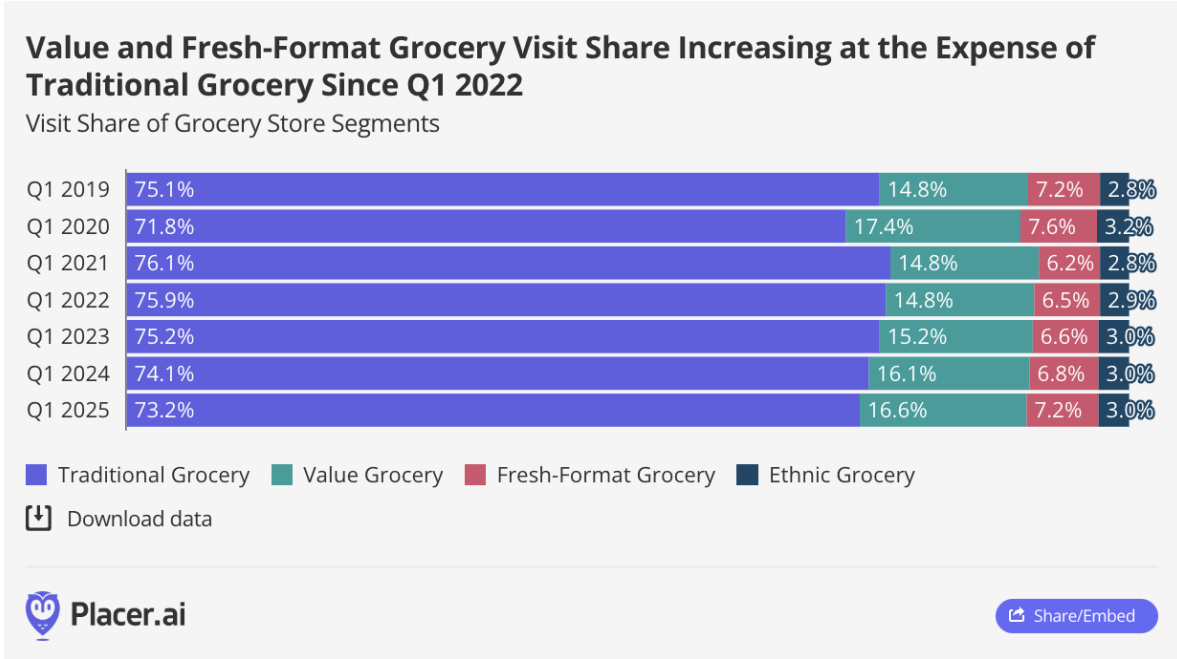
Which types of grocery stores are thriving the most? The grocery segment is diverse, encompassing traditional grocery chains like Kroger, Safeway, and H-E-B; budget-oriented value chains such as Aldi, WinCo Foods, Grocery Outlet Bargain



Market, and Market Basket; fresh-format specialty brands like Trader Joe’s, Whole Foods, and Sprouts Farmers Market; and numerous ethnic grocers.

Examining shifts in visit share among these various grocery store segments shows that traditional grocery still dominates, commanding over 70.0% of total grocery store foot traffic.

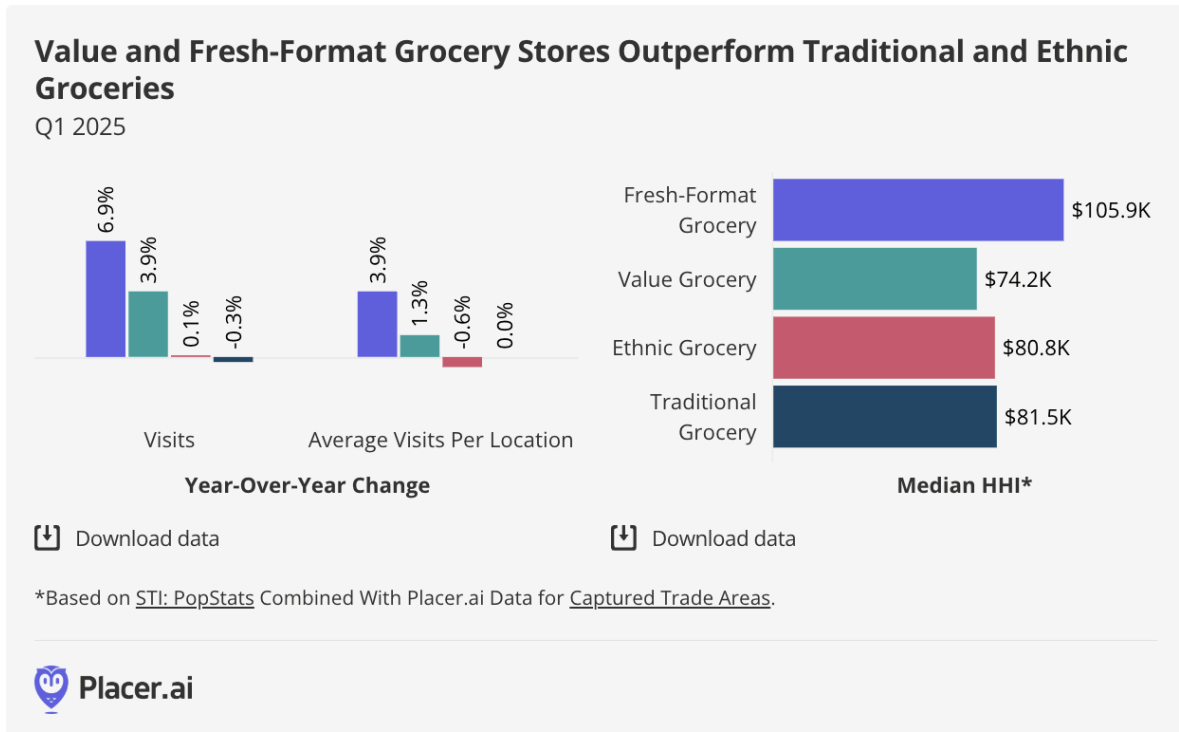
Still, over the past several years, traditional grocers have gradually ceded ground to other segments – especially value chains. Fresh-format banners, which lost ground in the wake of COVID, have also been on the upswing and appear poised to capture additional visit share in the coming months and years. And though ethnic grocers still account for a relatively small portion of the overall market, they have slightly increased their visit share, reflecting heightened consumer interest in these specialized offerings.



The Discount and Premium Edge

Recent performance metrics point to a bifurcation in the grocery market similar to that observed in other retail categories. In Q1 2025, fresh-format and value retailers – which appeal, respectively, to the most and least affluent visitor bases – saw the greatest growth in both overall visits and average visits per location.

This trend highlights the power of both value and health-focused quality to motivate consumers in 2025. And grocery players that can meet these needs will be well-positioned for success in the months ahead.

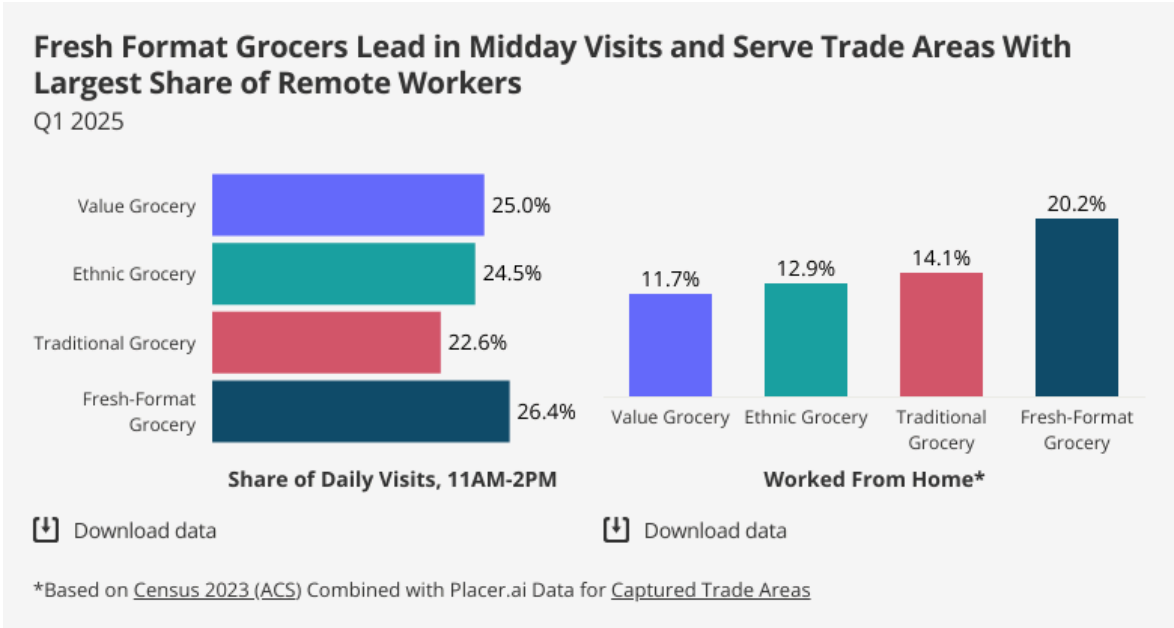


WFH Fresh-Format Lunch Crunch

One factor fueling fresh-format’s success may be its role as a convenient, relatively affordable midday lunch destination for the remote work crowd.

In Q1 2025, consumers working from home accounted for 20.2% of fresh-format grocery stores' captured market – a significantly higher share than any other analyzed grocery segment. These stores also tended to be busier midday than the other segments. Remote workers may be stopping by to grab a quick bite – and some may be choosing to do their grocery shopping during their lunch break when stores are less crowded.

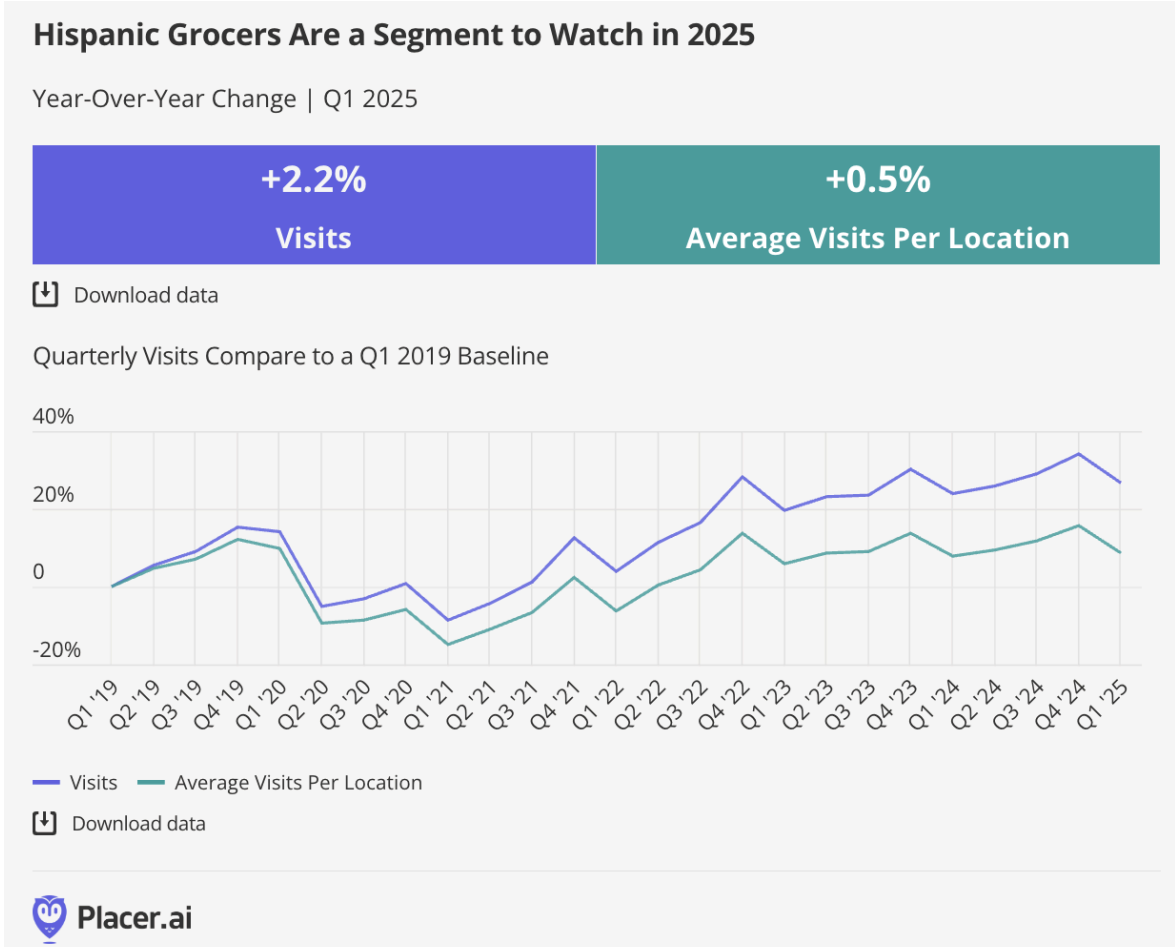
This finding suggests an opportunity for grocery operators across all segments to develop or enhance in-store salad bars and quick-serve sections to tap into the lunch rush. Likewise, CPG companies may benefit from developing more ready-made, nutritious meal options that align with these midday dining habits.



Salsa Surge

Though the broader ethnic grocery category remained essentially flat in Q1 2025, Hispanic-focused grocers emerged as a sub-segment to watch. Both overall visits and average visits per location to these stores have been on the rise since 2021.

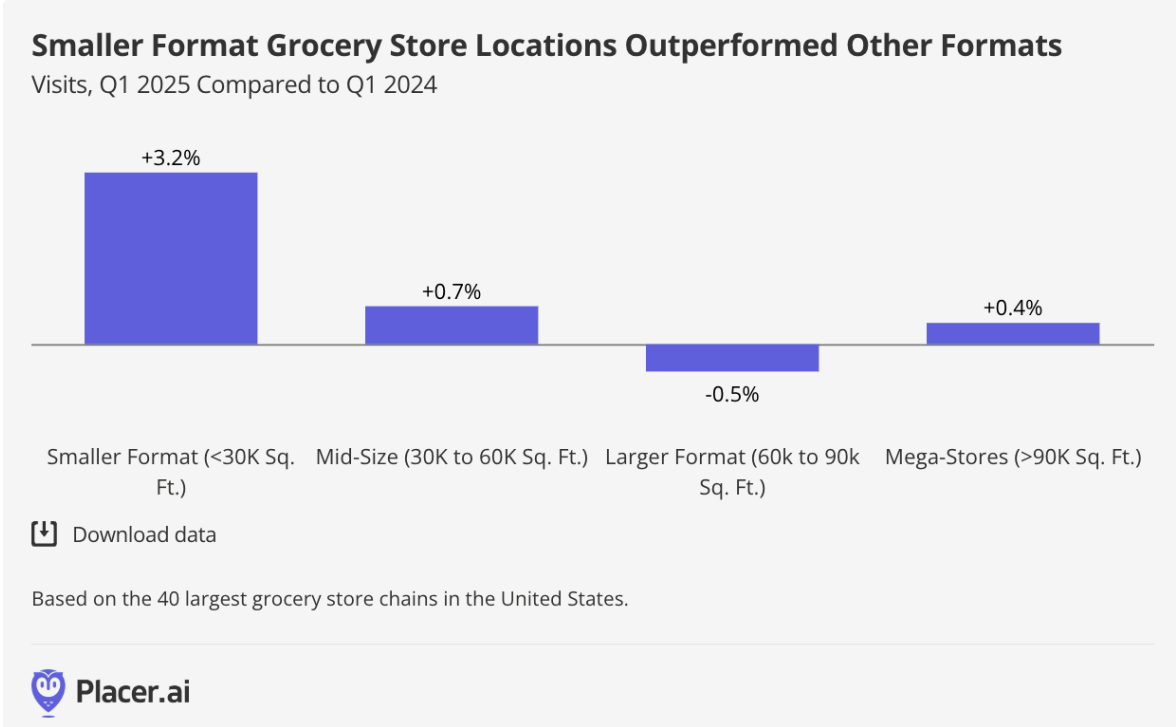
This robust demand presents an opportunity for CPG brands and grocers across segments to expand Hispanic-focused offerings, capturing a slice of this growing market.



Less is More

Finally, store size matters more than ever in 2025. During the first quarter of the year, smaller format grocery store locations (locations under 30K square feet, across different chains) outpaced larger stores with a 3.2% YoY jump in visits, showing that bigger isn't always better in the grocery store space.

This pattern aligns with the decrease in dwell times noted above – shoppers may be making shorter trips to smaller, more convenient grocery store locations. These quick errands are ideal for picking up a few items to supplement online orders, shopping multiple deals, or sourcing specialty products unavailable at larger grocery destinations. And to lean into this trend, grocery operators might consider testing neighborhood “micro-store” concepts, focusing on curated selections, and offering convenient parking or pickup to match consumer preferences for targeted purchases and quicker trips.



Final Thoughts

Location intelligence reveals a growing, dynamic grocery landscape which is holding its ground in the face of increased competition. Shorter trips, busier lifestyles, and changing work routines are reshaping in-store experiences. And grocery players that refine their store formats, target both lunch and on-the-go shoppers, and adapt to shifting demographics can position themselves to thrive in this competitive sector.

Key Takeaways:

1. **Shoppers are taking more, shorter trips to grocery stores.** Since COVID, the grocery segment has steadily increased both overall visits and average visits per location – even as average dwell times have consistently declined.
2. **Grocery stores are holding ground against fierce competition.** Despite competition from discount and dollar stores, wholesale clubs, and general mass retailers like Walmart and Target, grocery stores have maintained their share of the overall food-at-home visit pie over the past several years.
3. **Grocery visit share is most pronounced on the coasts.** In Q1 2025, grocery stores claimed the majority of food-at-home visits on the West Coast, in parts of the Northeast, Mid-Atlantic, and Mountain Regions, and in Florida and Michigan.
4. **Fresh-format, value, and ethnic grocery visit shares are growing at the expense of traditional chains.** And in Q1 2025, fresh-format and value grocers outperformed the other sub-segments with positive YoY visit and average visit-per-location growth.
5. **Hispanic markets are on the rise.** Though the broader ethnic grocery sub-segment was essentially flat YoY in Q1 2025, Hispanic-focused stores have seen steady visit growth since 2021.
6. **Smaller formats for the win.** In Q1 2025, smaller-format grocery store locations outpaced mid-sized and larger-format ones, underscoring the power of compact spaces to deliver significant foot traffic gains.