NIQ
Perspectives
Food & Beverage

February 5, 2026

When, where, & why behind today's traffic

"Smaller, more frequent trips don't weaken growth. They have a huge potential to multiply it. Think about it–shoppers are in the store more often. That's more chances for impulse, more chances for trial, more chances for repeat–that's more chances all around. Those chances earn relevance and have the potential to reinforce habit, but only for those brands and retailers that show up strong, consistently, and with purpose. As competition intensifies around trips, a small group of players is already beginning to separate as breakaway leaders."

Chris Costagli

Vice President, Thought Leadership F&B Insights Lead, NielsenIQ

Did you know…

- Households earning $150K+ are **2.5x more likely** to generate more shopping occasions per buyer, giving retailers and brands a greater chance for conversion?[1]
- GLP-1 households are **1.4x more likely** to make smaller, more frequent shopping trips to keep spending low and adjust volume for a smaller, healthier appetite?[2]
- Gen Z shoppers are **1.3x more likely** to opt for larger value-size packs because they are focused on savings in the long-run over the moment?[2]

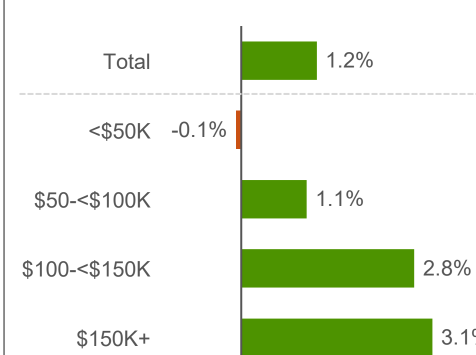
Implications for the FMCG Industry

Frequency is replacing volume

FMCG growth is entering a new operating system. The next era will not be defined by convincing shoppers to buy more per trip, but by earning the right to be part of their repeat routine. As persistent inflation keeps baskets disciplined, growth is being generated through higher visit frequency, not higher unit velocity. The industry needs to pivot from the mindset of optimizing baskets to commanding recurrence.

FOOD & BEVERAGE OCCASIONS % CHANGE [1]

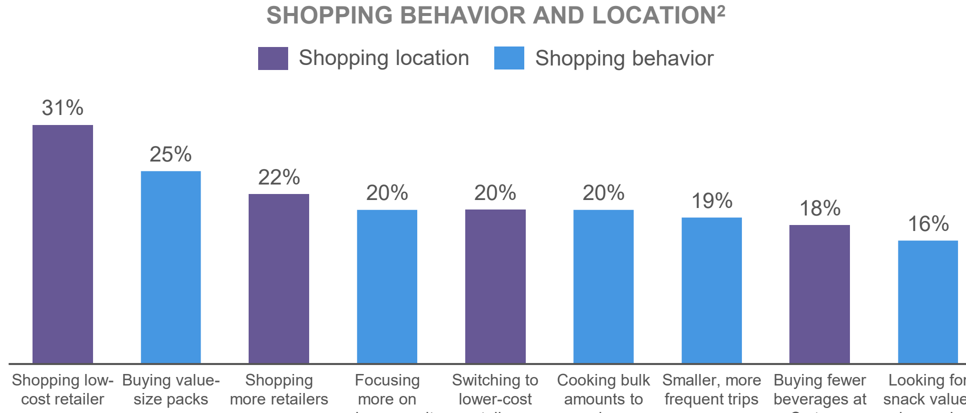
% CHANGE IN OCCASIONS BY INCOME LEVEL[1]



New normals of shopping

Inflation has fundamentally changed what "worth it" means—and the shopper knows it. In a pressure-filled economy, the center of gravity has shifted decisively to the consumer, who controls where to shop, how often to go, and how much each trip is allowed to cost as brands and retailers compete. For some, value is created through volume; for others, it's about unit price—but for all shoppers, value is the strategy they bring to every trip.

IMPACT OF INFLATION ON SHOPPING BEHAVIOR AND LOCATION[2]



Industry Analysis Sources: [1]NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, Total Food & Beverage, 52 Weeks Ending 12/27/2025; [2]NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead; Maria Camila Garnica, Industry Analyst

NielsenIQ

NIQ Perspectives

Food & Beverage

The takeaway…

- Smaller, more frequent trips expand conversion opportunity; brands and retailers gain more chances to influence choice, reinforce habit, and earn repeat permission across a growing number of decision moments.
- Price the mission, not the item. Shoppers judge value holistically, making total trip economics more important than any single price point.
- Grocery price-pack architecture is misaligned with today's shopper reality; it must be re-engineered to support disciplined spending, clearer value signals, and mission-based shopping behavior.

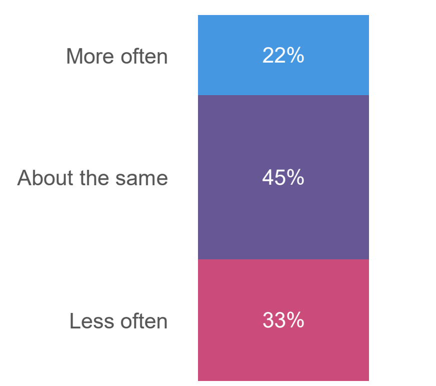
Your next move…

- Treat in-store activation as a conversion engine, not a visibility tactic. In a world of more frequent trips, the goal is no longer to interrupt—but to reinforce and convert consistently.
- Design packs for recurrence, not stockpiling. Frequency-aligned pack architecture will outperform oversized formats that assume fewer, larger trips.
- Follow trips, not legacy distribution models. Brands absent from Club, online, or other high-frequency destinations are quietly opting out of the future growth curve.

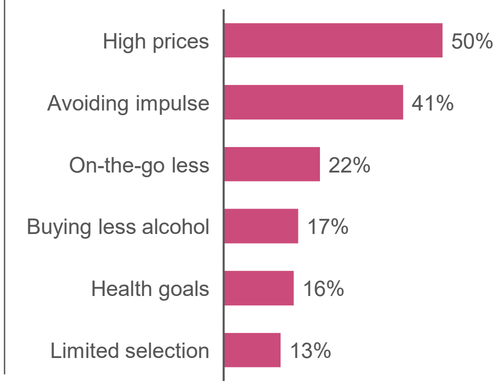
Convenience is being squeezed out of the shopping rhythm

Convenience is being squeezed from every angle—and none of the pressure is temporary. The channel's legacy traffic drivers are structurally eroding: smoking continues to decline, alcohol consumption is at historic lows, fuel efficiency is rising, and EV adoption is accelerating. Convenience was built on speed, and shoppers once paid a premium for it—but today they are questioning both the price and the purpose of the trip.

CONVENIENCE CHANNEL SHOPPING FREQUENCY VS. YEAR AGO[2]



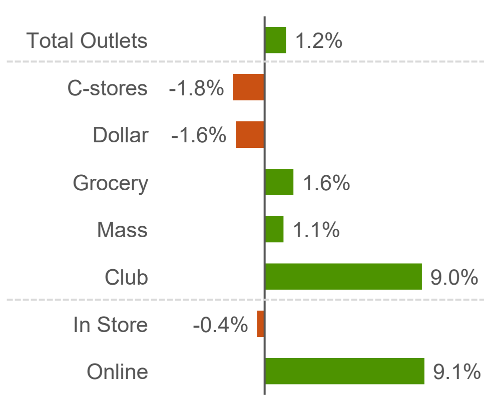
REASONS FOR SHOPPING IN THE CONVENIENCE CHANNEL LESS OFTEN[2]
(AMONG THOSE SHOPPING C-STORE LESS)



Foot traffic to club and finger traffic to eCommerce is trending up

Shoppers are migrating toward channels that make value feel obvious and effortless. Club delivers certainty through scale—pairing volume economics with exclusive member benefits and high-quality private labels that reduce second-guessing. eCommerce offers a different kind of value by collapsing time and choice, putting an almost unlimited assortment within instant reach, and empowering shoppers to filter based on what matters most.

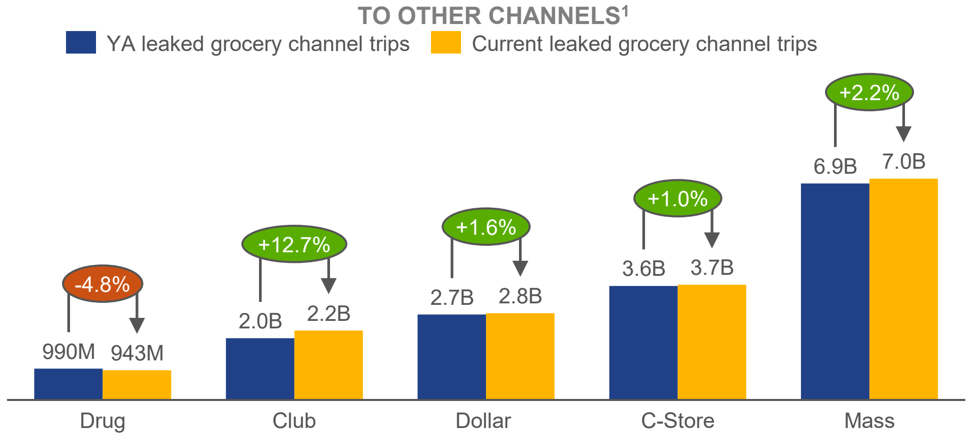
FOOD & BEVERAGE TRIPS PER BUYER % CHG ACROSS CHANNELS[1]



Grocery channel is giving up trips

As grocery surrenders trips, club is capturing the most valuable ones. The real threat to grocery isn't traffic loss—it's mission displacement, as club increasingly owns high-value stock-up occasions. For manufacturers, this makes disciplined, purpose-built club distribution a strategic imperative. For grocery retailers, the challenge is no longer pricing items to compete—it's pricing the entire stock-up mission to stay relevant.

GROCERCY SHOPPER LEAKED TRIPS TO OTHER CHANNELS[1]



Questions?

Chris Costagli
VP, F&B Thought Leadership
Chris.Costagli@NielsenIQ.com

The shifts we're seeing in where and how shoppers buy are not temporary reactions—they are newly ingrained habits that are actively rewiring the FMCG landscape. We are in a transition period where frequency, mission clarity, and behavioral certainty are replacing volume as the industry's growth engine. Five years from now, the channels and retailers leading the FMCG Industry in the US will be those who recognized this moment for what it truly is: not a pause before normalization, but the foundation of a permanently different shopping economy.

NielsenIQ

Industry Analysis Sources: [1]NIQ, Expanded Omnishopper Panel On Demand, Total US, Total Outlets, Total Food & Beverage, 52 Weeks Ending 12/27/2025; [2]NIQ, BASES Quick Question Omnibus Survey, n=2,006, January 2026

Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead; Maria Camila Garnica, Industry Analyst