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Winning the Value-Conscious Shopper:

How Price Pressure is **Reshaping** Grocery Buying*



*Based on findings from Acosta Group Europe's The Why? Behind The Buy™ UK Edition.

About this report:

Winning Value-Conscious Shoppers is the first white paper in 'The Future of UK Grocery Shopping series'. It draws on selected findings from the wider 'Why? Behind the Buy™' research to explore how the cost-of-living era is reshaping grocery decision-making.

About the Research:
The Why? Behind the Buy™ UK Edition is based on a custom survey of 946 UK shoppers, fielded in August 2026. The research explored the grocery and household shopping journey, including channel choice, affordability, promotional behaviour, digital shopping, brand and private-label decisions, and food-away-from-home trends.

Analysis and reporting were completed by the Acosta Group Shopper Insights US team, working in collaboration with Acosta Group Europe, with the UK sample sourced externally.



About Acosta Group Europe:
Acosta Group Europe is a leading sales and marketing agency empowering brands and retailers to win in the modern marketplace. With a deep understanding of the retail landscape across the UK and Europe, Acosta Group Europe offers comprehensive solutions designed to drive growth, enhance efficiency, and connect consumers with the brands they love.

Executive Summary

- **Value has become a mindset**
  Shoppers across demographics are becoming more deliberate about spending.

- **Promotions shape buying decisions earlier**
  Deal-seeking increasingly begins before the store visit.

- **Shoppers are making different levels of sacrifice**
  Some are trading down, some are cutting back and others are opting out altogether.

- **Planning has become a competitive advantage**
  Lists, comparison and channel choice are helping shoppers regain control.

- **Value extends beyond grocery**
  Consumers are applying the same mindset to food-away-from-home spending.

- **Brands must make value visible**
  Clear differentiation, availability and relevant promotions matter more than ever.



Value as a Mindset

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The value mindset is no longer a characteristic of a single demographic. Higher-income households, families and younger generations may face different pressures, but each is becoming more deliberate about where and how money is spent. Today, value is judged through a wider lens, balancing price with quality, convenience and confidence in the purchase. Our research provides several indicators of this shift:

59% of all shoppers typically shop at value grocers such as Aldi and Lidl.

Value grocery is not a niche or last-resort channel. It is a mainstream destination, with particularly strong appeal among families managing larger household baskets.

98% of shoppers buy private-label products.

This near-universal adoption shows that shoppers are weighing up whether established brands offer enough additional quality, or convenience to justify the price difference.

PRICE — **QUALITY** — **CONVENIENCE** — **CONFIDENCE**

The widening audience value:



64% of households with children shop at value grocers



41% of Gen Z bought more private label



37% of Millennials bought more private label products



21% of higher-income shoppers always choose private label beside a comparable brand

For some shoppers, value means stretching a limited budget; for others, it is about refusing to pay more without a clear benefit.

What are shoppers feeling and experiencing?

74% of shoppers feel at least somewhat comfortable affording groceries and essentials.

23% always or often feel stressed about being able to afford groceries and essentials.

The findings suggest that financial confidence and value-conscious behaviour can coexist. Even shoppers who can afford the grocery shop may still question prices, compare alternatives and avoid purchases that no longer feel worthwhile.

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The New Deal-Seeking Shopper

Promotions have always influenced grocery shopping, but deal-seeking is becoming a more deliberate part of the journey. Shoppers are checking vouchers, opening retailer apps and comparing prices before they reach the store or begin building an online basket. This means the decision to buy is increasingly shaped before a shopper encounters the product on the shelf. Brands and retailers are no longer competing only at the point of purchase. **They are competing to enter the shopper's plan.**

70% of shoppers wait for an item to go on sale or promotion at least sometimes before buying it

Waiting for a deal has become a purchasing strategy in its own right. Promotions are not only changing which product shoppers choose; they can determine when the purchase happens at all.

The deal hunt before the buy

Physical trip:

- **39%** check online vouchers before a physical shopping trip
- **27%** create a digital shopping list

Online order planning:

- **56%** check online vouchers
- **50%** compare prices online

Shoppers are arriving at the store or retailer website with more information than ever. **Deal-seeking** is particularly pronounced before online orders, where prices, offers and retailers can be compared more easily. But the physical trip is also becoming more informed, with digital and traditional planning tools working alongside one another.

What promotions matter most?

57% prioritise retailer loyalty and rewards promotions

56% prioritise sale or reduced-price offers

The findings point towards a preference for value that is immediate, familiar and easy to calculate. Loyalty rewards and reduced prices lead the ranking, while more complex or experiential mechanics attract a smaller proportion of shoppers.

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What Shoppers Are Sacrificing

Price pressure is not producing one universal response. Instead, shoppers are making a series of trade-offs based on what they need, what they value and what their budgets can accommodate.

Some are trading down to lower-cost brands and products. Others are cutting back on purchases that are wanted but not essential. For many, the pressure has gone further, leading them to opt out of certain products altogether. Understanding these differences matters. Each behaviour presents a different challenge for brands, from defending a price premium to ensuring a category continues to feel relevant.

74%
switched to lower-cost products because of their budget

70%
cut back on at least some non-essential purchases

58%
stopped buying certain products altogether to align with their 2026 budget

Which categories are leaving the basket?

- Premium and branded products
- Red meat
- Salty and sweet snacks
- Seafood and fish
- Alcohol
- Beauty and personal care
- Ready meals and convenience foods
- Dairy and eggs

The range of categories affected is telling. Shoppers are not only reassessing obvious treats. Some are also removing products associated with meals, convenience, personal routines and everyday household consumption.

Who is most likely to opt out of buying products in these categories?

65%
Lower-income shoppers

66%
Gen Z

63%
Gen X

Product removal extends beyond those facing the greatest financial pressure, suggesting that shoppers across different demographics are reassessing what still deserves a place in the basket.

SUBSTITUTE → REDUCE → REMOVE

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The Rise of Strategic Shopping

Planning is not confined to one age group, although the tactics and motivations vary. Across generations, shoppers describe using preparation to control spending, reduce waste and make trips more efficient.

Gen Z: control impulse spending

Gen Z shoppers described using meal planning, shopping lists and buying only what was needed to reduce grocery spending and impulse purchases. They also reported comparing prices, using digital vouchers and shifting trips towards retailers perceived to offer better value.

Millennials: make more of what is already available

Millennials described meal planning, shopping with lists, using food already at home and reducing shopping frequency to limit waste and unnecessary purchases. Larger, planned shops were also used to keep essentials available and support household routines.

Gen X: consolidate the trip

Gen X shoppers described consolidating shopping runs, planning menus before the trip and using lists to save time, control budgets and reduce waste

Boomers: maximise the value of established routines

Boomers described more intentional planning focused on efficiency, consolidating purchases, minimising waste and making greater use of discounts, vouchers and loyalty rewards.

Food Away From Home:

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The value mindset does not stop at the supermarket checkout. Rising prices are also changing how often consumers eat away from home, where they choose to eat and what they order when they do.

For some, the response is to eat out less frequently. Others are keeping the occasion but reducing its cost by choosing a less expensive venue, ordering a lower-priced meal or removing extras. The occasion may remain, but the way consumers access it is becoming more deliberate.

31%
bought food away from home less often in the previous month than in the month before

58%
maintained the same frequency

11%
increased their food-away-from-home frequency

Reduced frequency rose to:

44%
among lower-income consumers

40%
among Gen X

What's driving the wider pressure?

63%
noticed higher dine-in prices

While most consumers maintained their usual frequency, almost a third reduced how often they purchased food away from home. This rises among lower-income consumers and Gen X, while widespread awareness of higher dine-in prices highlights the broader cost pressure surrounding these occasions.

What brands must do next

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Justify every penny of the price premium

Shoppers should not have to work hard to understand the saving. Clear pricing, simple promotional mechanics, visible pack sizes and easy comparisons will be more effective than complicated offers.

This is supported by the preference for loyalty rewards, reduced prices and vouchers, alongside shoppers' extensive use of apps and comparison tools.

Give shoppers a reason not to remove the brand

With premium and branded products among the leading items being cut, brands need to communicate the benefit shoppers would lose by trading down or opting out. That may be superior performance, taste, durability, convenience or a distinctive usage occasion.

Influence the shopper before they reach the shelf

Treat promotions as part of the entire journey. Promotion planning should connect retailer apps, loyalty programmes, online product pages, pre-trip communications and in-store displays. Deal-seeking begins before the store visit and continues at the shelf.

Don't lose the sale at the final hurdle

A strong offer can encourage purchase, but only if the product is available when shoppers are ready to buy. Consistent availability helps maintain shopper confidence and reduces the risk of consumers switching to alternatives.

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