

# The Great Inflation

## Navigating evolving consumer behaviours through inflation

May 2022

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# Setting the Stage



# Is the new normal too expensive?

With the price of everything on the rise, people are increasingly concerned about their bills creeping higher each month, and businesses are gauging where their costs are heading in the months to come.

- The annual rate of inflation in Canada hit **6.7%** in March 2022, the fastest year-over-year increase in over **31 years**, the highest rate ever since **1991**.
- The growing rate of inflation has alarmed economists and central bankers amid signs that Canadians are beginning to expect inflation to remain high for some time.

- In the USA, the inflation rate hit a **40-year high of 8.5%** in March this year, the largest 12-month increase since the period ending **December 1981**.
- Costs for food, gasoline, housing and other necessities are squeezing consumers while paychecks are slow to keep pace.

## Inflation has exploded during the pandemic

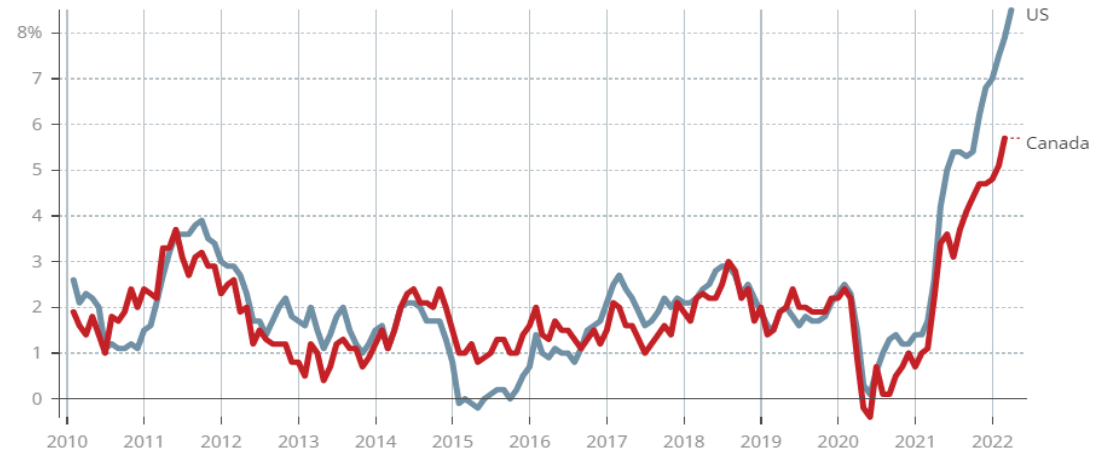


Chart: Pete Evans/CBC • Source: U.S. Department of Labour

CBC News

Inflation was largely under control for four decades but began to accelerate in the USA, Canada and around the world with economic rebound from the COVID recession, and accelerated with the impacts from the war in Ukraine.

After years of relative stability, inflation rates plunged in 2020 when COVID-19 began, before roaring back in 2021 and beyond due to supply and demand imbalances, and record-low interest rates.



# U.S Economy

The acceleration of inflation has occurred against the backdrop of a booming job market and a solid overall economy. The Consumer Price Index for All Urban Consumers increased 1.2 percent in March on a seasonally adjusted basis after rising 0.8 percent in February.

## INCREASES IN THE INDEXES FOR GASOLINE, SHELTER, AND FOOD WERE THE LARGEST CONTRIBUTORS

- The gasoline index rose 18.3% in March and accounted for over half of the all-items monthly increase; other energy component indexes also increased. The food index rose 1.0%, and the food at home index rose 1.5%.

## THE SHELTER INDEX WAS BY FAR THE BIGGEST FACTOR IN THE INCREASE

- The index for all items less food and energy rose 0.3% in March following a 0.5% increase the prior month, with a broad set of other indexes also contributing, including airline fares, household furnishings and operations, medical care, and motor vehicle insurance.
- In contrast, the index for used cars and trucks fell 3.8% over the month.

## THE ALL-ITEMS INDEX CONTINUED TO ACCELERATE

- With the index rising 8.5% for the 12 months ending March, the largest 12-month increase since the period ending December 1981.
- The all items less food and energy index rose 6.5%, the largest 12-month change since August 1982.
- The energy index rose 32% over the last year, and the food index increased 8.8%, the largest 12-month increase since May 1981.



## INFLATION OVERTAKES LABOR QUALITY AS THE TOP BUSINESS PROBLEM FOR SMALL BUSINESSES

Current Issues

- More than two-thirds of small businesses reported higher average selling prices, while more than a quarter say inflation is their No. 1 problem, according to the latest monthly survey from the [National Federation of Independent Business](#).
- Of those making expenditures, 38% reported spending on new equipment, 22% acquired vehicles, and 17% improved or expanded facilities.



## MOST BUSINESSES THINK IT WILL TAKE AT LEAST TWO YEARS TO GET INFLATION UNDER CONTROL

Looking to the Future

- Price hikes were the most frequent in wholesale (84% higher), construction (83% higher), agriculture (78% higher), and retail sales (77% higher). Seasonally adjusted, a net 50% of owners plan price hikes, up four points from February.
- 7% of owners acquired new buildings or land for expansion, and 11% spent money on new fixtures and furniture. 26% of owners are planning capital outlays in the next few months.



US consumers are experiencing soaring prices at the pump. Instead of using less gas, they are cutting back in grocery and restaurant visit frequency.

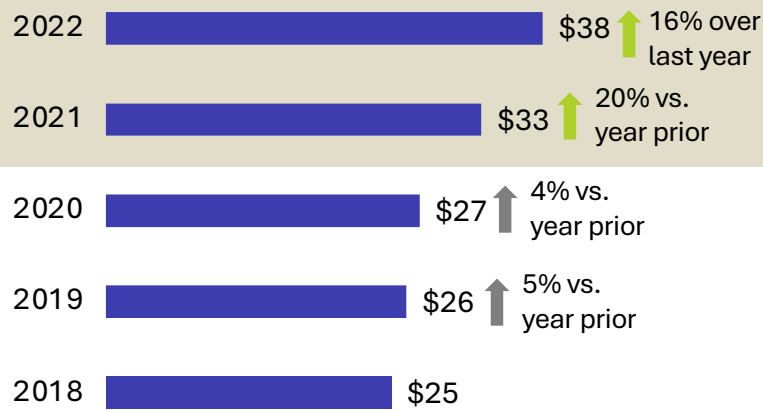


## GAS SPEND

Though US consumers are experiencing a higher price at the pump, they are continuing to use gas at consistent rates despite inflation.

**5** Average trips per month to the pump has remained **fairly consistent** over the past 5 years.

### Cost of Average Fill-Up

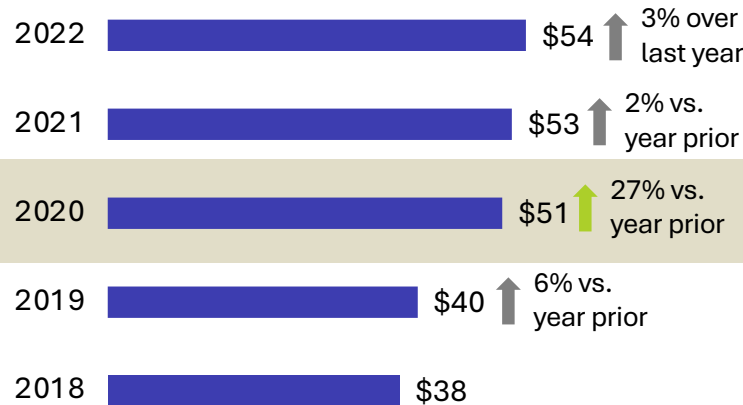


## GROCERY SPEND

The average grocery trip cost has remained consistent since 2020, though consumers are taking less trips to the store to combat inflation.

**6** Average grocery trips per month, **down 1 trip** on average compared to prior years.

### Cost of Average Grocery Trip

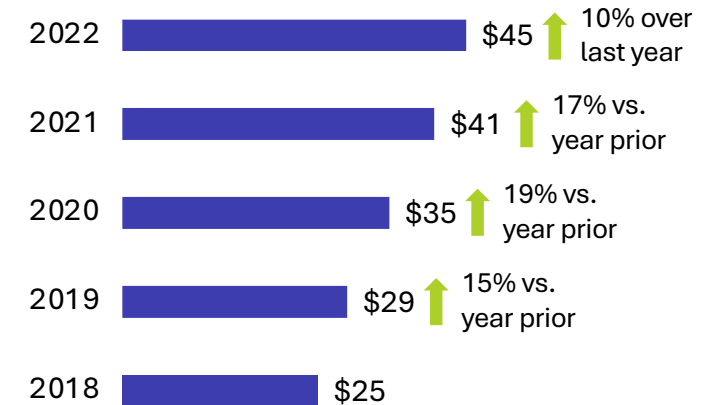


## RESTAURANT SPEND

Restaurant visits costs have increased by ~15% each year though visit frequency has decreased in 2022 to save money.

**18** Average restaurant visits per month, **down 1 trip** on average compared to prior years.

### Cost of Average Restaurant Visit

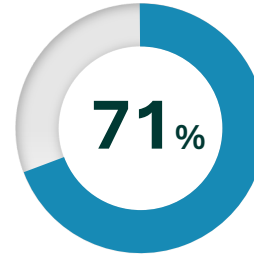
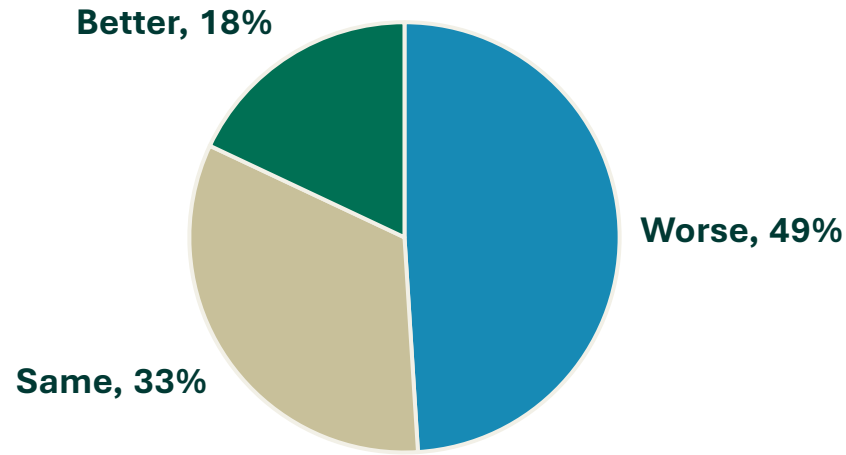


# Response to Inflation

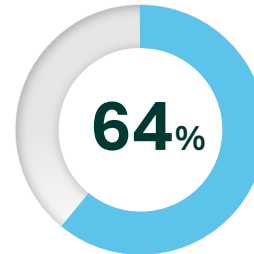


# Many are struggling to keep up with inflation and feel they are worse off financially.

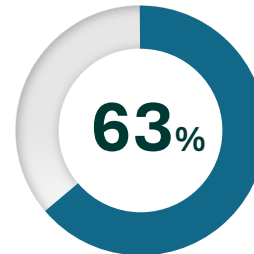
Financial Situation Versus Year Ago %



Over 7-in-10 Americans report their household income is not keeping pace with inflation.



Nearly two-thirds of Americans have been heavily impacted by the increased cost of living in recent months.

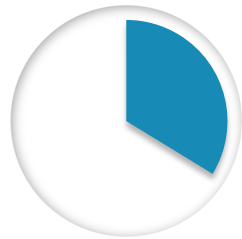


Over 6-in-10 Americans indicate they can't keep up with the cost of living.



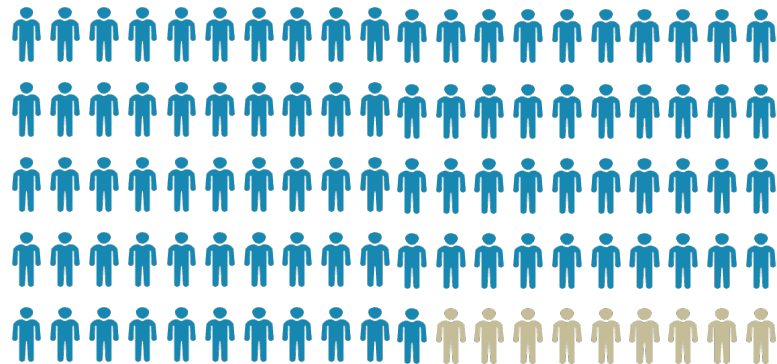


Many Americans feel inflation is unnecessary to keeping the economy healthy and the majority feel the federal government should prioritize actions to control increasing prices.



**33%**

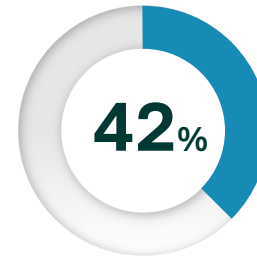
believe inflation is necessary in order to keep the economy healthy.



**91%** believe that controlling inflation should be a high priority for the federal government.

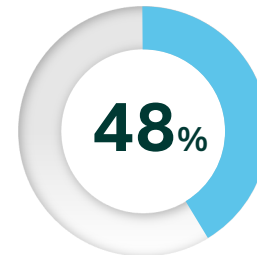
*Our government needs to focus more on inflation. It's made everyday life harder than ever before.*  
- Female

Financial instability is a very real concern for about one-half of Americans who are experiencing a high debt load and uncertain about their job security in the current economic climate.



**42%**

Over 4-in-10 Americans report they have too much debt.



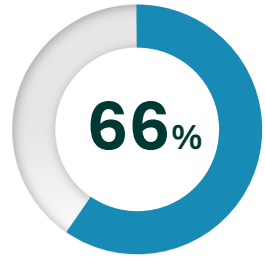
**48%**

Nearly one-half of Americans are concerned they (or a household member) could lose a job because of the economy.

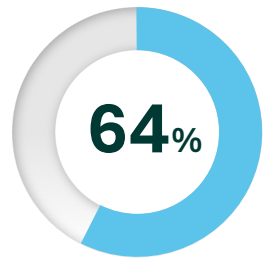




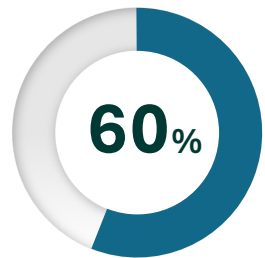
## Dealing with inflation is also causing emotional stress for many Americans.



A full two-thirds of Americans are **fearful** they will not have the finances necessary to manage their older years independently.



Nearly two-thirds of Americans are **stressed** about money



A full 6-in-10 Americans feel **overwhelmed** by financial burdens.



*I feel **concerned** about inflation simply because me and my husband have a child to feed and also ourselves. It has always caused me **great stress** whenever the **price** of food **goes up**. It makes me **worried** how we will get along **financially**.*

*- Female*



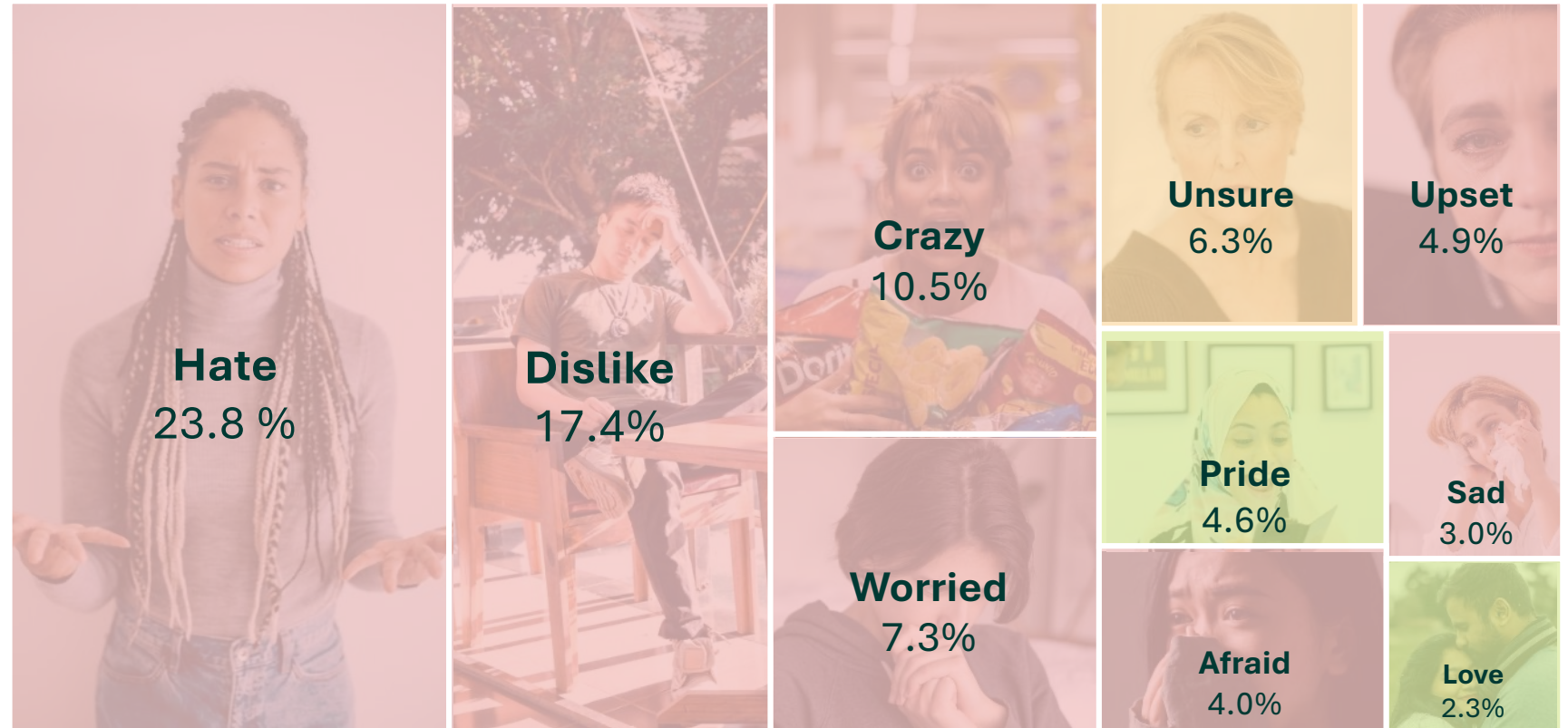
While these behavior changes have been forced upon them, some consumers' sentiments show they have found a silver lining; others remain frustrated.

Sentiment Analysis %



*I hate these changes. They make me feel as if I can't do anything to control my life.*

- Female





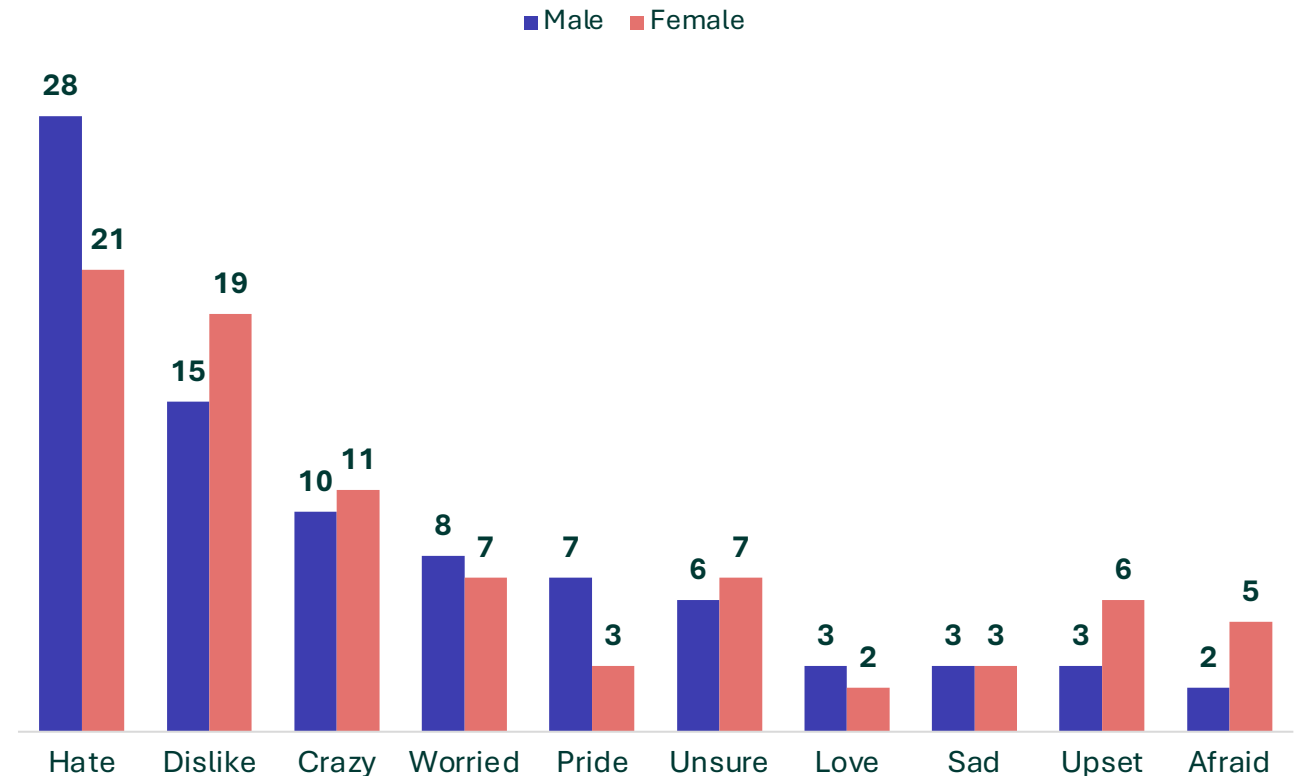
Males expressed stronger negativity towards inflation often thinking about the here and now, while females felt more worried and highlighted their concerns for the future.

In response to how behaviors have changed as a result of inflation, female respondents spontaneously mentioned the topic of buying more than male respondents

- **Females** also mentioned being **money conscious** more often than males, indicating that female respondents are concerned and thinking more about their spending habits than males during this inflation period.

- **Females** also mentioned **concerns around food and groceries** more often than males in their responses to how behaviors have changed during this period of inflation.

Sentiment Analysis %





# Consumers are concerned that their income isn't maintaining pace with the exponential increase in the cost of living.



*Inflation is happening far **too fast** and steep and is making it **impossible** for me to **maintain my living scenario**.*

*- Male*

- Overall, the increase in prices has left consumers feeling **worried** – both **now** and for the **future**. Many have found ways to **cut back** and **adapt** right now, but there is much **uncertainty** in what lies **ahead**.
- The **inflation rate** has consumers worried about how they are going to **keep up**; especially when their **income isn't**.
- In their current state, they have made **cutbacks** to adapt, which was **troubling** for some, and **looking forward** they are **unsure** how they will be able to manage.



# Segmentation: Struggling, Adapting or Still Thriving?





“

*Fortunately, my family hasn't been pushed to the brink, but I worry about our seniors and young families. I can see how problematic inflation is for so many. Some are struggling more than others.*

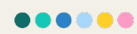
*Male, 45-54 years*

”



# Three unique experiences define the consumer response to inflation.

Responses to inflation vary greatly by subgroup, including socioeconomic status, life stage and consumer outlook, to name a few.



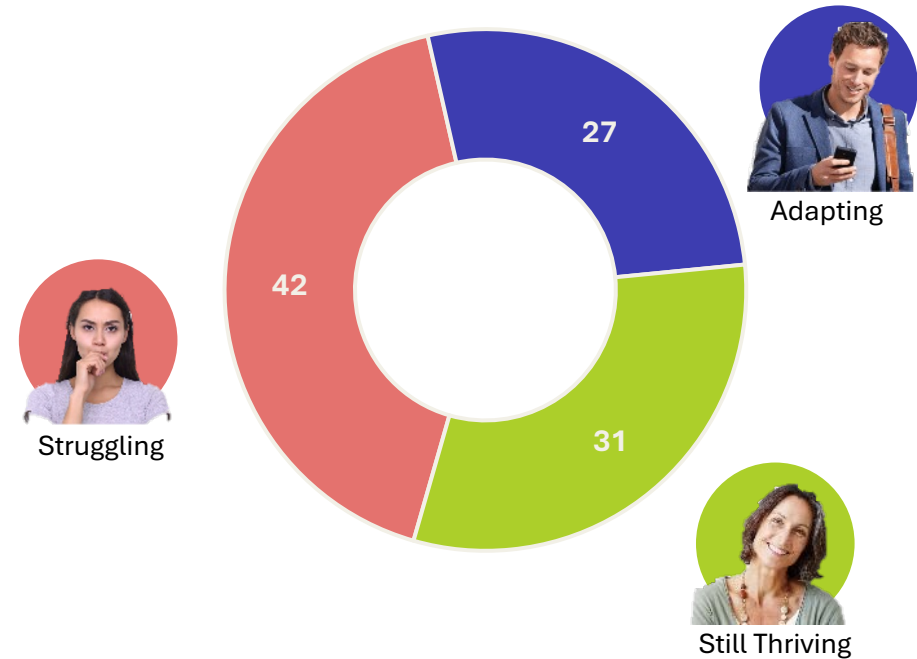
A segmentation model identifies patterns within a data set and groups individual responses based on:

- **Common traits they share with others:** *internal* homogeneity;
- **Distinction from other subgroups:** *external* heterogeneity.

The resulting output is a grouping of all the respondents that share similarities with respect to one another, however, are differentiated from other groups.

We identified three unique segments through the evaluation of 14 attitudinal and 53 stated behavioral inputs.

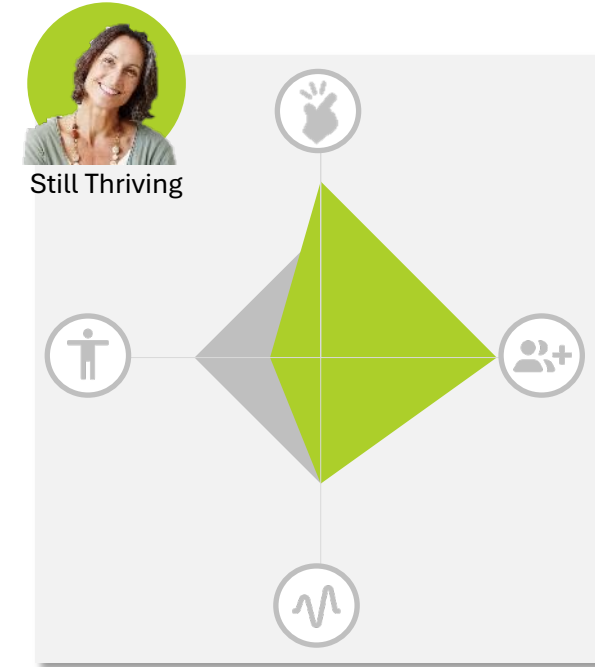
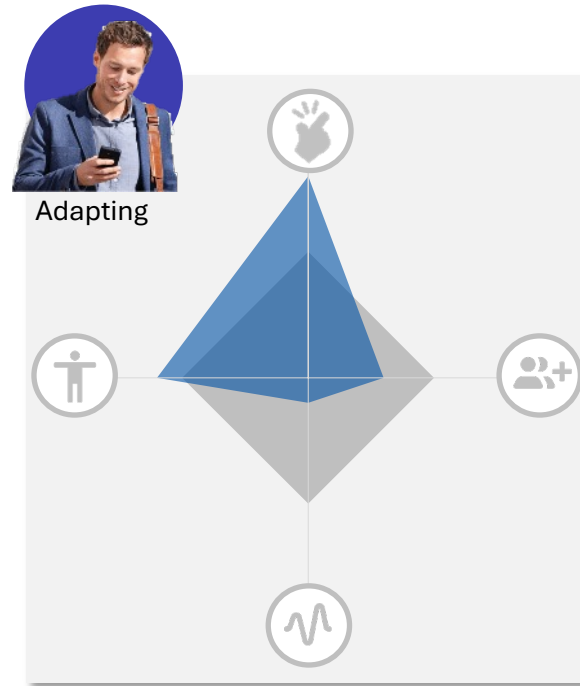
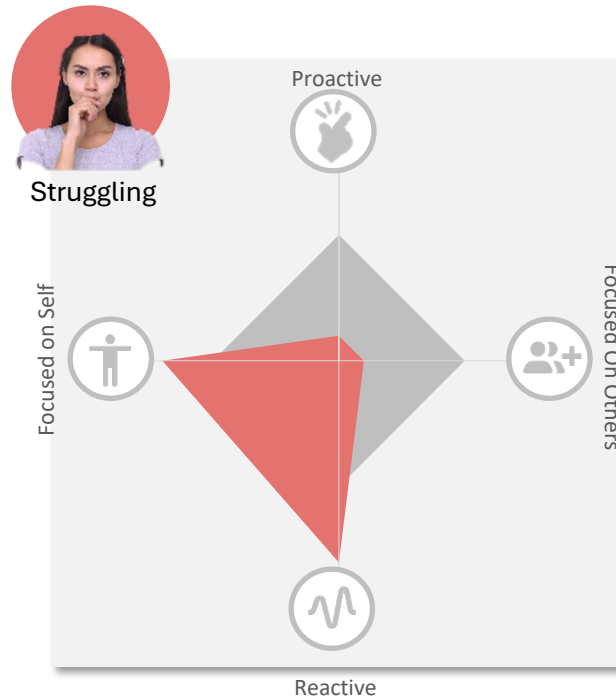
Consumer Segments %







*Struggling* Americans and those *Adapting* are focused on personally reducing the impact of inflation, while those *Thriving* have capacity to be empathetic to others less fortunate.



### Defining Mindset

Settling and compromising.  
Stretching self and family to survive.

Flexing adaptability and ability to  
reprioritize in order to maintain lifestyle.

Benefiting from stability and preparedness  
while concerned about others.



# Two-in-five Americans are **struggling** to keep pace with inflation.



42% OF AMERICANS

## STRUGGLING

These Americans are spending carefully and making significant compromises in the face of inflation yet struggle to keep pace with the increased cost of living. Their financial security is at risk, leaving them feeling overwhelmed and stressed about their money and their future.

Struggling Americans are most likely to cut back on all forms of spending and to have switched their primary grocery store in recent months due to inflation. They often shop around and take advantage of deals, flyers, and loyalty points to offset spending.

### Top 5 Emotions Felt

- #1 Sad
- #2 Despair
- #3 Anxious
- #4 Disapproval
- #5 Annoyed

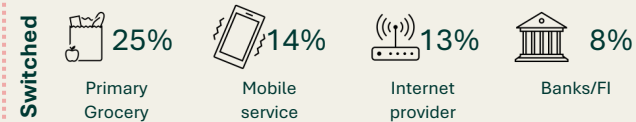
### Behavioral Impacts

#### Spending Cutbacks



**21**  
Avg. # of categories impacted by inflation

#### Struggling Americans over-index for spending cuts across all categories due to inflation

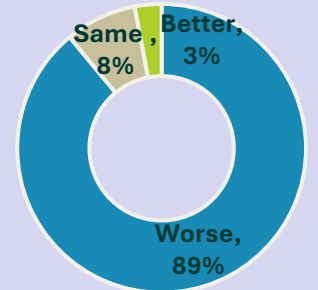


“

I lay awake at night. We've had to make dramatic changes to our lifestyle to keep up with the price of groceries and gas. Forget luxuries. We've given up on many small joys of life to stretch the budget.

”

### Financial Situation vs Year Ago



### Comparative Position

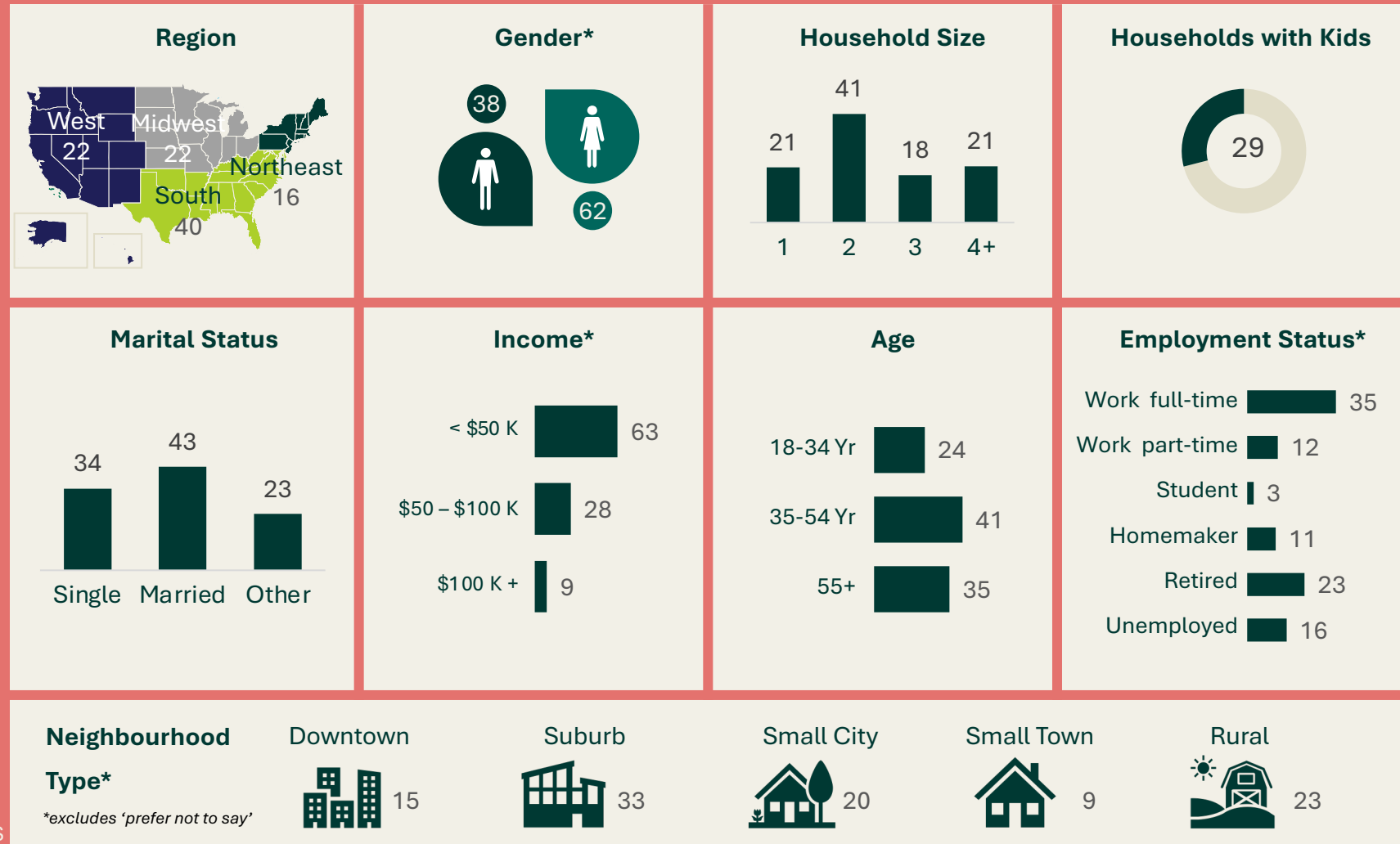
Ability to Manage Cost of Living	<b>LOWEST</b>
Amount of Debt	<b>HIGHEST</b>
Concern about future	<b>HIGHEST</b>



# Getting to Know **Struggling** Americans



42% OF AMERICANS





# About one-quarter of Americans are **adapting** habits and priorities in response to inflation.



## ADAPTING

**Adapting Americans are not particularly concerned about their financial security. They are the segment least likely to indicate they've been negatively impacted by inflation and take things in stride. They are confident in their financial future despite have the highest debt load and being most concerned about job loss.**

This segment has responded to inflation by switching service providers, including financial, insurance, mobile and cable/internet providers. They have also adjusted priorities, delaying education and housing purchases over the last few months.

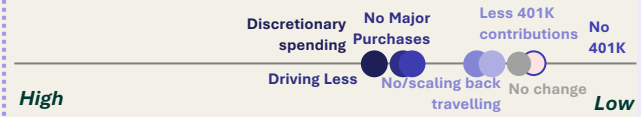
“  
*Nobody enjoys inflation, but I think I'm luckier than most. I've had to get more creative about my spending and have done what I can to get better rates. Every little bit helps.*  
”

### Top 5 Emotions Felt

- #1 😄 Optimistic
- #2 😊 Hope
- #3 😞 Sad
- #4 😍 Love
- #5 😎 Proud

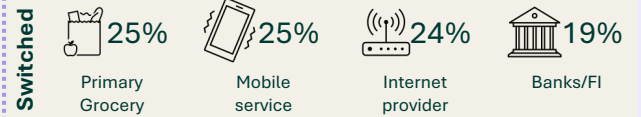
### Behavioral Impacts

#### Spending Cuts

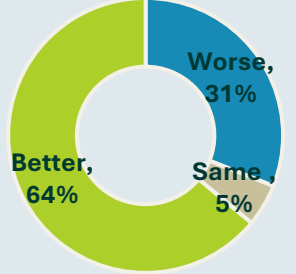


**23**  
Avg. # of categories impacted by inflation

**Americans who are adapting are less likely to cut down due to inflation except for cannabis, professional clubs, lessons and gyms.**



### Financial Situation vs Year Ago



### Comparative Position

Ability to Manage Cost of Living	<b>MODERATE</b>
Amount of Debt	<b>HIGH</b>
Concern about future	<b>MODERATE</b>





# Getting to Know **Adapting** Americans





# About 3-in-10 Americans are **still thriving** despite unprecedented inflation.



31% OF AMERICANS

## STILL THRIVING

Those thriving in the face of inflation are the least likely to be personally impacted by increasing prices and, as a result, are least likely to have changed their spending habits or shopping behaviours as a result. They are calm, prepared, and feeling optimistic about their future.

While some moderate cut-backs have been made by this group, they are more likely to focus their efforts on minimizing wastefulness and pantry-loading when deals present themselves.

### Top 5 Emotions Felt

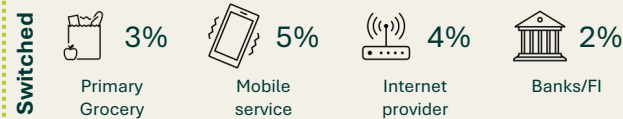
- #1 😊 Optimistic
- #2 😊 Hope
- #3 😐 Cynicism
- #4 😠 Annoyed
- #5 🤔 Curious

### Behavioral Impacts

#### Spending Cuts



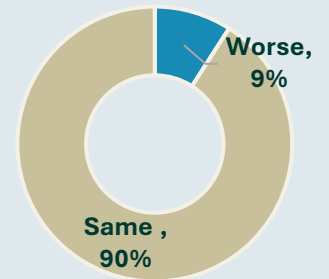
Americans who are still thriving are less likely to cut down on any everyday purchases due to inflation



“

*I consider myself lucky to be able to afford things even at inflationary prices. At my age, we've been through this before. It can feel ridiculous but it's necessary for the economy.*”

### Financial Situation vs Year Ago



### Comparative Position

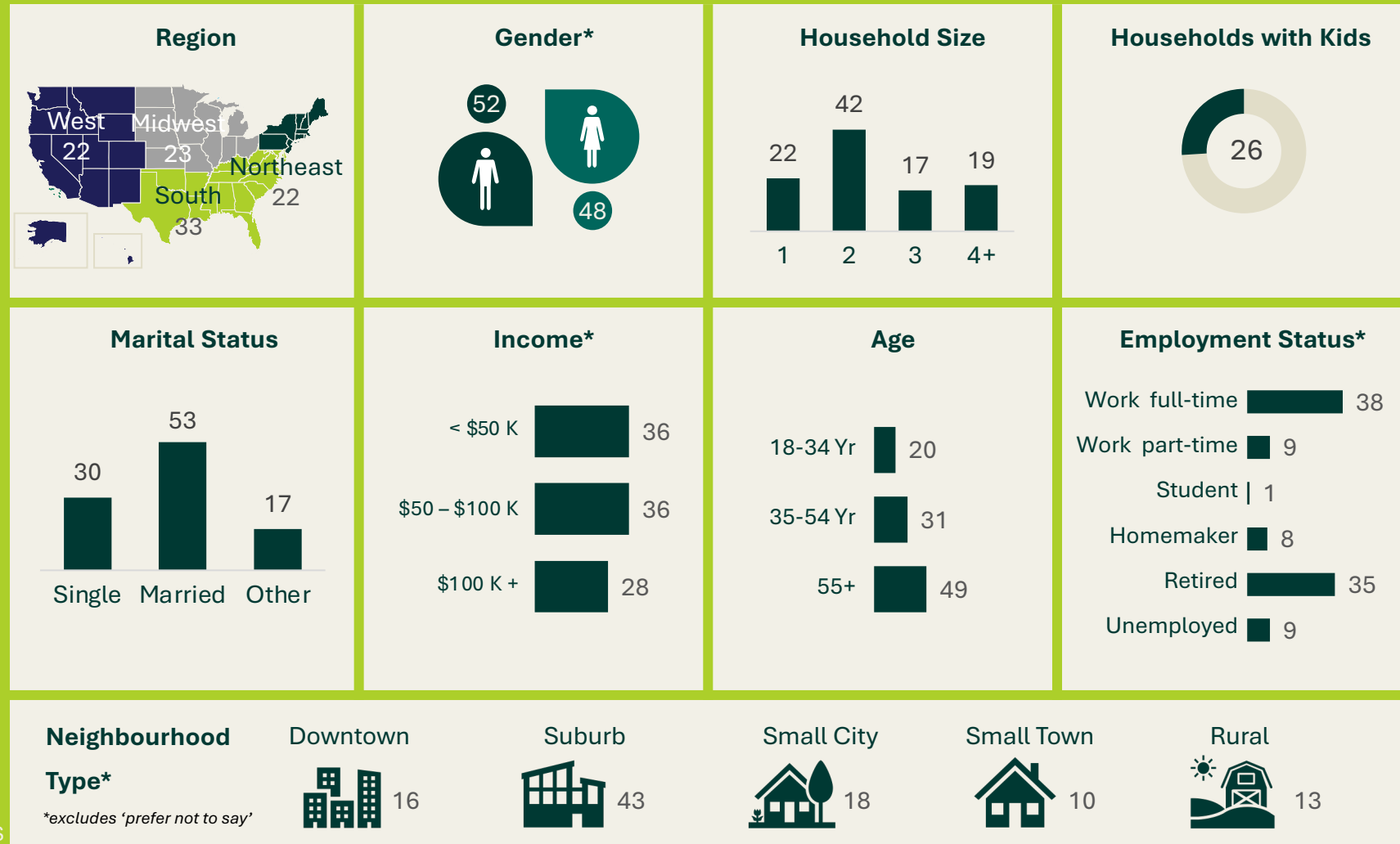
Ability to Manage Cost of Living	HIGHEST
Amount of Debt	LOWEST
Concern about future	LOWEST



# Getting to Know **Still Thriving** Americans



31% OF AMERICANS



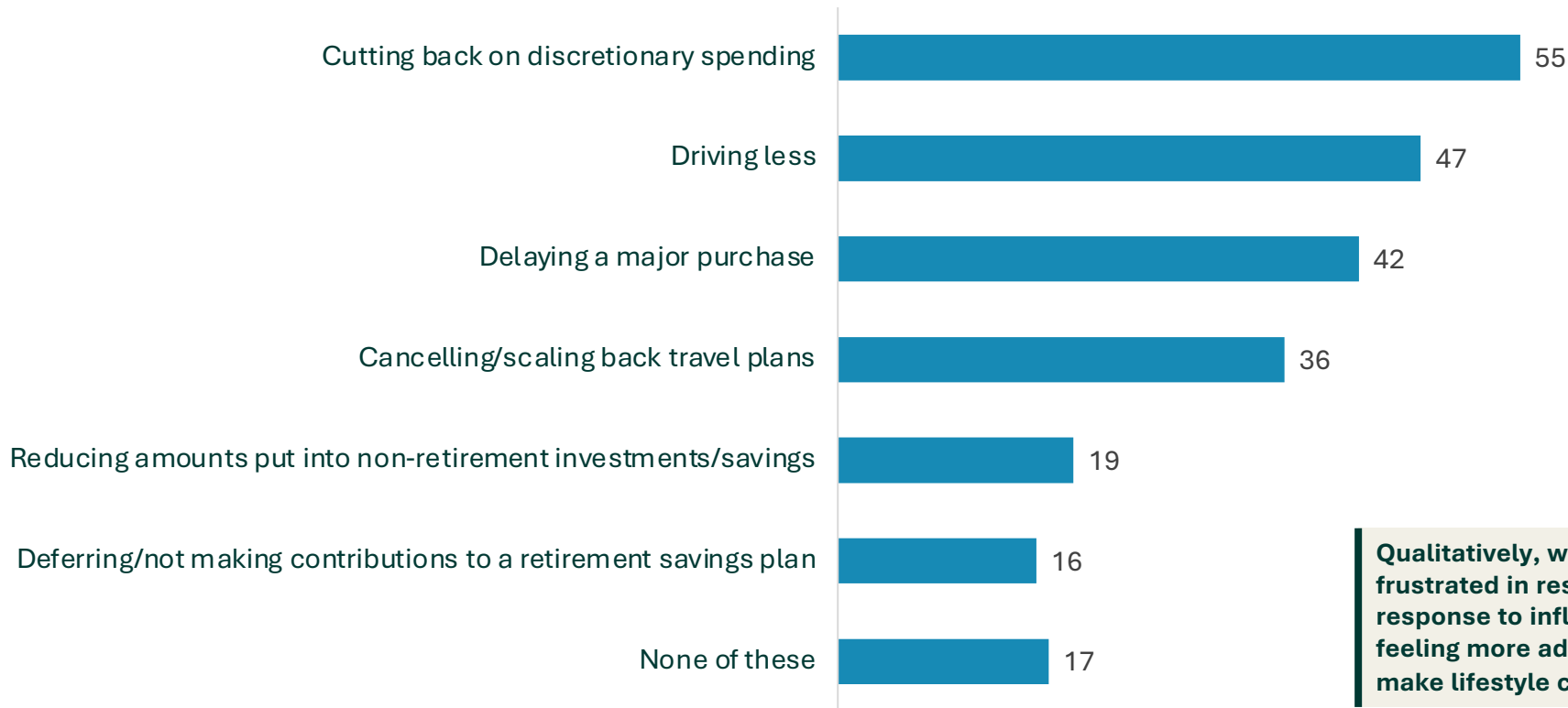


# Inflation's Impact on Where & How We Spend



US households are most likely to cut back on discretionary spending and drive less in response to inflation. About 2-in-5 have delayed major purchases.

### Spending Cuts in Recent Months %



**2**  
Cut-backs on average

Qualitatively, we see American consumers are more frustrated in response to making changes in response to inflation versus Canadians who are feeling more adaptable and even optimistic having make lifestyle changes in response to inflation.



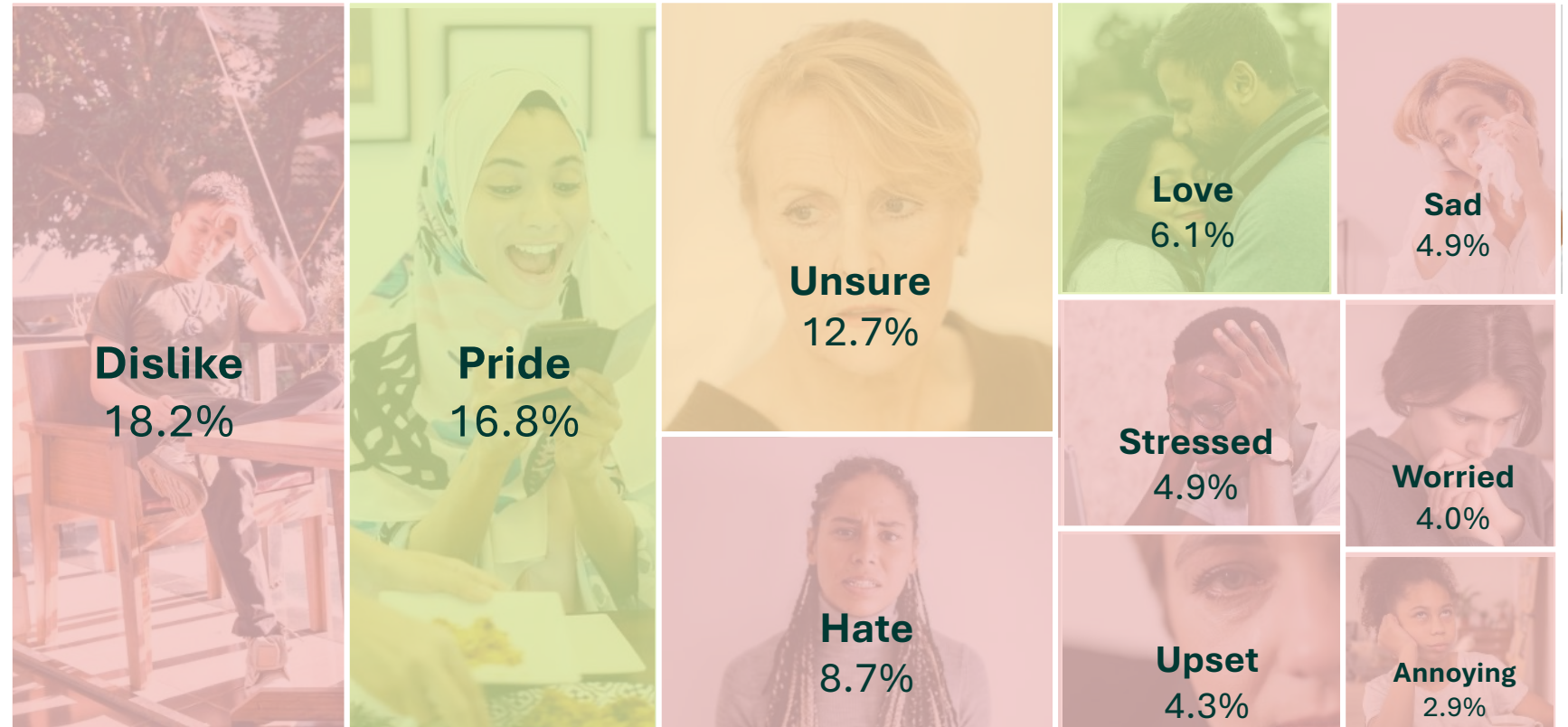
However, while this behavior change has been forced on them, some have found a silver lining, while others remain frustrated.

Sentiment Analysis %



*I **dislike** the change. I feel like I should watch how I spend and that soon I will have to **limit myself**.*

Female



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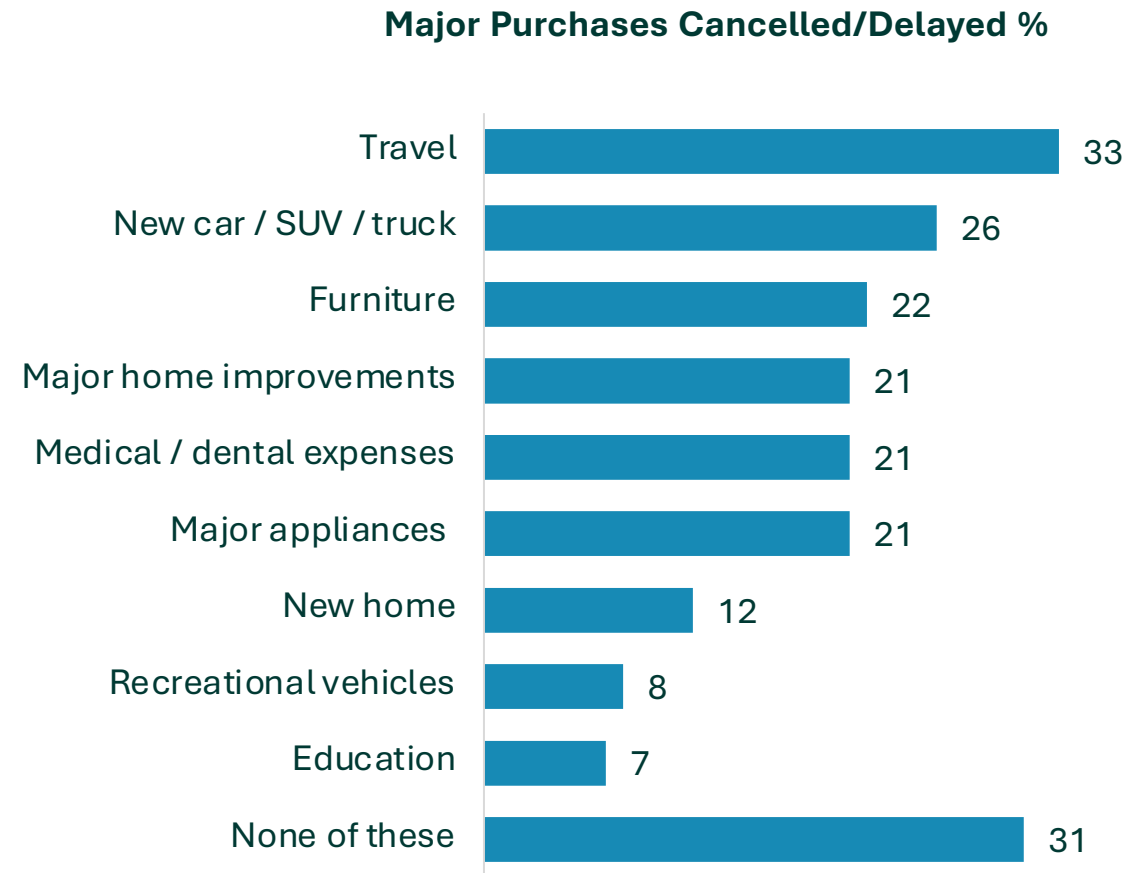
*In a way, it's teaching me how to be more **frugal in everyday living, cutting out the unnecessary things, making room for only what's **needed!*****

- Male

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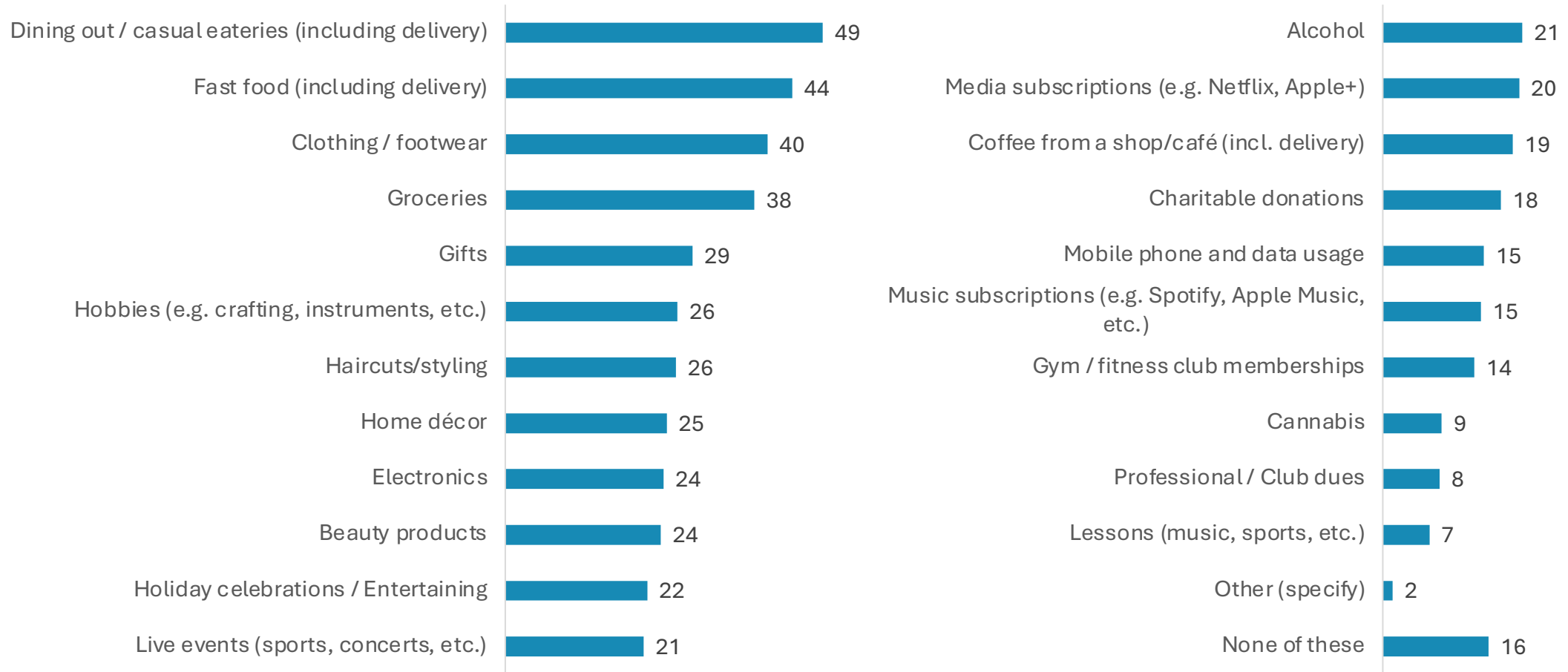
When prompted, over two-thirds of Americans indicate they have cancelled or delayed major purchases due to inflation in recent months with travel most impacted.





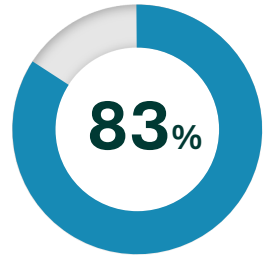
Discretionary food and apparel purchases are most likely to be cut in the face of inflation while just over one-in-ten Americans have cut subscriptions and memberships.

**Spending Cutbacks Due to Inflation %**

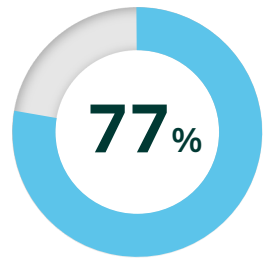




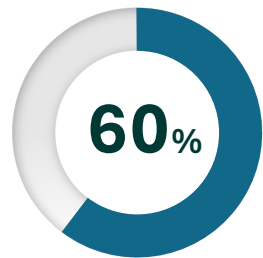
Ultimately, Americans have been quite adaptable in the face of inflation.



Over four-in-five Americans are **spending money more carefully** than they did a few months ago due to rising prices.



About 3-in-4 Americans are **making compromises** to adjust for the rising cost of living.



A full 6-in-10 Americans are **actively looking for opportunities** to earn supplemental income beyond their regular jobs.



*I **prepare meals** at home and have **stored food** for emergencies. We are planting a **garden** to save money too.*

- Female

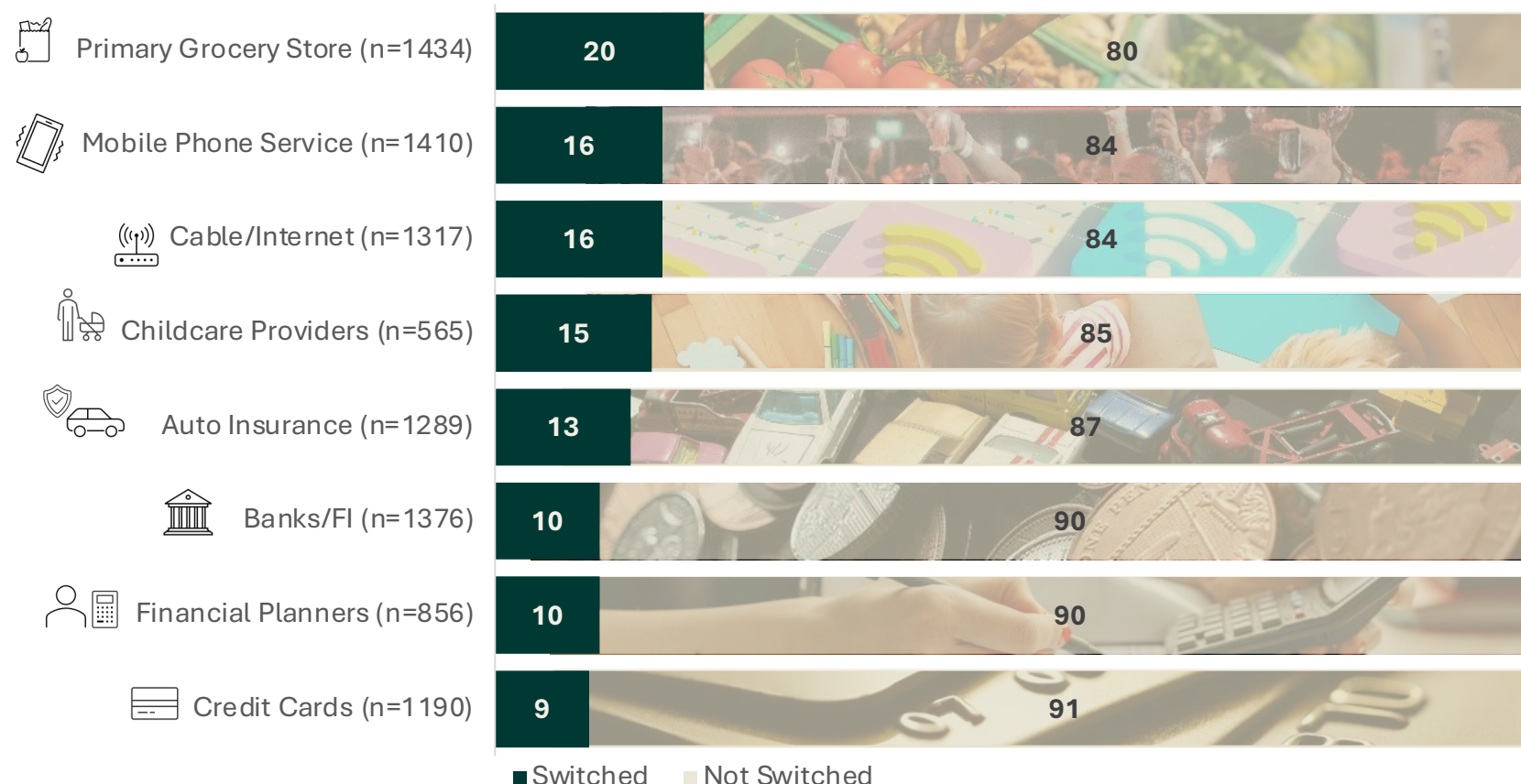




Americans are most likely to switch their providers in industries with low barriers to switching: primary grocery store, telcomm and childcare providers top the list.

### Switching Behaviors

(% excluding not applicable)



Q14. Have you switched any of the following providers in the last few months as a direct result of rising prices, or not?  
Total US: (n=1531)



And while there are downsides to inflation, consumers are self-reflecting and have developed habits that help them to adapt and shop wiser.

## Progress Adapting



### Better Money Management Habits

Increasing prices is leading to tighter budgets and consumers are more cognizant of their spending.



### Increased Resilience

Inflation has proven to be a challenge, but consumers are doing their best to effectively adapt.



### Finding Balance

Cutting back has them realizing what is truly important to them and how they can still enjoy life.



### Saving Time and Money

Consumers are developing habits to help them save time and money that are useful practices moving forward.

## Continued Challenges



### Working to Survive

As prices increase, but their income remains stagnant consumers are struggling to make ends meet.



### Discomfort with Change

Change isn't always easy, and consumers are still figuring out what works for them.



### Missing Out

With limiting their spend to necessities, consumers feel that they are missing out – from entertainment to food.



### Loss of Hope

Consumers are left feeling helpless as they try to provide the basics and make their bill payments on a budget.



# Consumers are leaning into more discount retailers to cope with inflation; they're more willing to visit multiple retailers for a good deal.

- Inflation has resulted in consumers shopping with **stricter budgets**, and they are moving beyond their typical **retailers** and **brands** to help find financial comfort.
- Inflation has sent consumers on the **deal hunt**; they are willing to put forth the **extra effort** to save money where they can. They are adding retailers to their **shopping repertoire** so that they can take advantage of all the **deals**.
- **Planning** their trips is how these consumers are saving money – even amidst the **rising prices**. They want to be **time, cost, and fuel efficient** so consumers are preparing accordingly by shopping **flyers** and making their **lists**.



*I am going to **more stores** to find the **best prices** on each item. When I find something at a **reasonable price**, I **stock up** on it.*

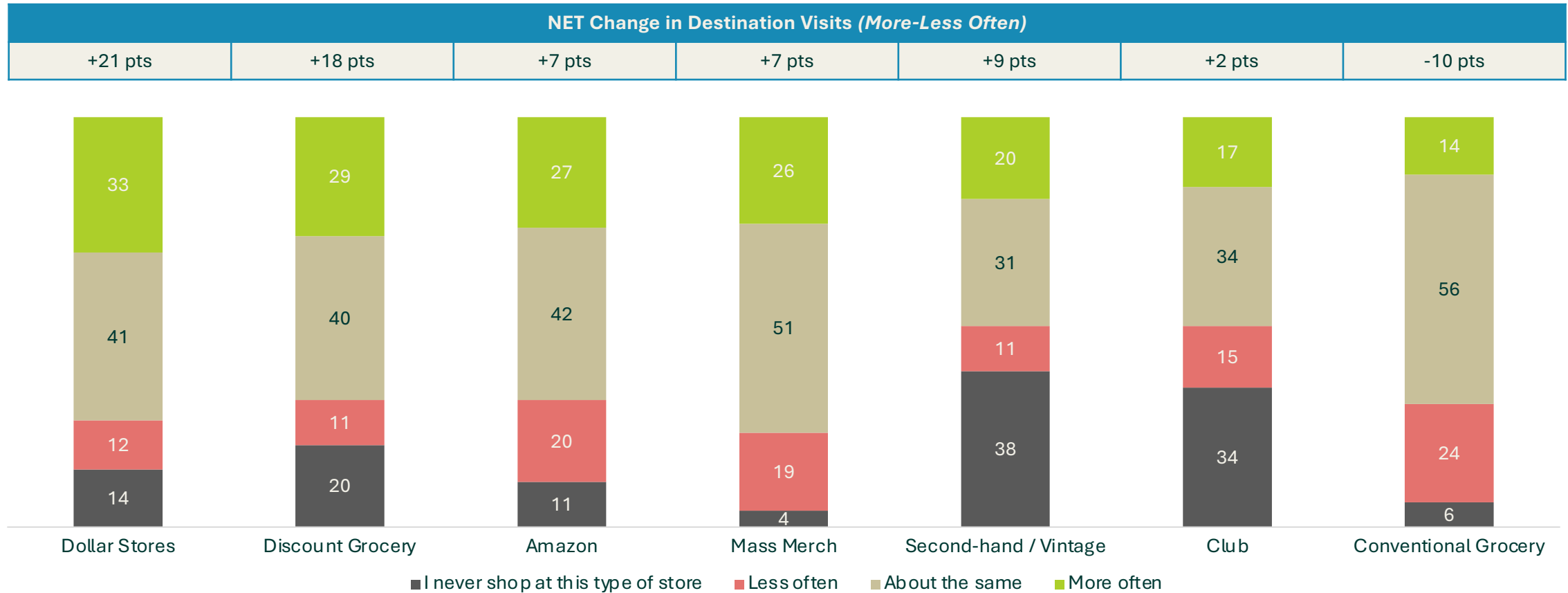
- Male





Consumers are also changing where they shop, with dollar and discount grocery stores seeing the biggest uptick while conventional grocery stores are declining.

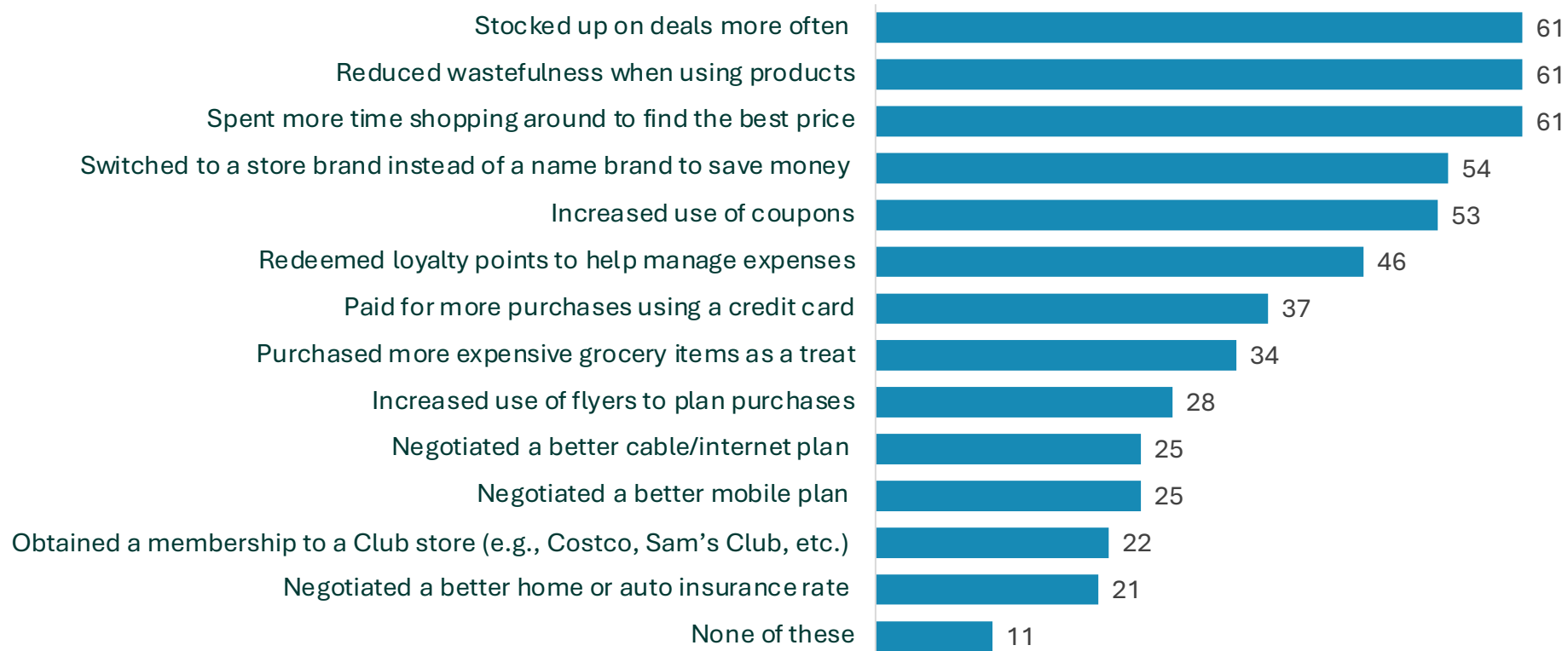
### Channel Momentum: Trip Changes Due to Inflation %





About 6-in-10 Americans are stocking up on deals, reducing wastefulness and spending more time to find best price amidst rising prices.

### Behaviors Attributed to Inflation %





# Category Insights





# Upsiide Exercise: Inflation Impact by Category

Respondents were shown 44 grocery categories and indicated whether they have changed their purchasing habits of each due to inflation.

## Effect Frequency

Respondents were shown 44 product categories, one at a time, and asked to indicate if inflation has affected their buying behaviors of each.



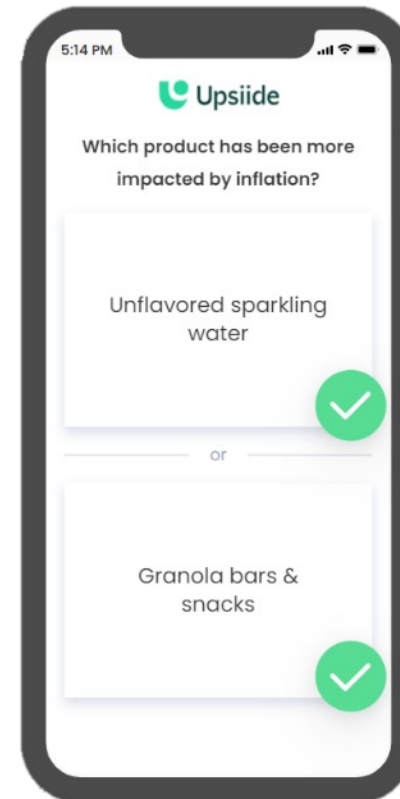
No, inflation has not affected my purchase behavior in this category.

The metric generated from this exercise tells us **incidence** of inflation impacting purchase habits within this category.

Yes, inflation has affected my purchase behavior in this category.

## Effect Strength

Once a respondent indicated that inflation has affected their purchase behavior for 2 products, the products are shown head-to-head and the respondent selects which one has been more significantly impacted by inflation. The metric generated from this exercise indicates the **strength** of inflation's influence on each product relative to the other products in the set.



The two metrics are plotted together to show the combined impact. Inflation has both a **widespread** and **strong effect** on those products farther in the upper righthand quadrant, while those in to the bottom left have been less impacted.

# Detailed Category Inputs

44 product categories were evaluated in our Idea Screen exercise. For the purposes of this report, the products shown in the exercise have been placed into the below categories. These categories were not visible to the respondent, nor did they affect the order in which the products were shown to the respondent in the exercise.

Household & Personal Goods
Toothpaste/oral care
Paper towel
Bath & body care
Cleaning supplies
Haircare products
Pet food
Toilet paper
Over-the-counter medications*
Cannabis

Fresh Foods
Yogurt
Cheese
Eggs
Milk (dairy)
Fresh produce
Seafood
Beef, poultry and pork*
Bakery bread, rolls, & buns
Packaged bread

Beverages
Flavored sparkling water
Fruit juice
Unflavored sparkling water
Plant-based milk (soy, oat, etc.)*
Energy drinks
Sparkling soft drinks
Coffee
Wine & beer

Prepared/Packaged Foods
Soups, stews & chilis
Frozen pizza
Tofu & plant-based proteins
Cereal
Meal replacements (e.g. Boost, Ensure)*
Frozen fruits and vegetables
Bacon, hot dogs & sausages

Snacks & Sweets
Crackers
Chips
Granola bars & snacks
Cookies
Ice cream tubs
Chocolate bars, tablets & pieces*
Ice cream novelties (sandwiches, cones, bars)*

Pantry/Staples
Spreads & syrups
Dry pasta, rice & beans
Baking products (flour, sugar, mixes, etc.)
Condiments & toppings

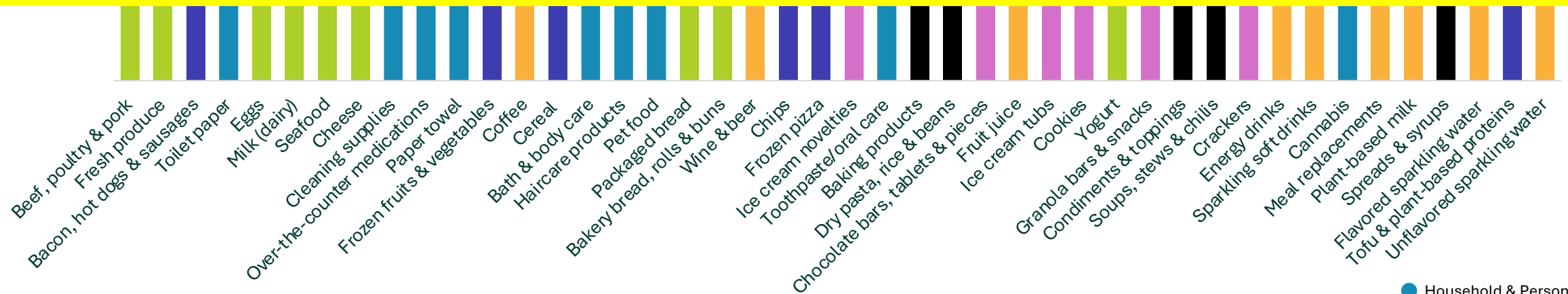


Fresh foods are most frequently and strongly affected by inflation. Americans are least likely to be responding to packaged beverage & snack inflation versus other categories.

### Categories Ranked by Inflation Impact Score

69  
61

**INTERNAL NOTE: If you are pulling this deck for a client and want to highlight a category that is relevant to your client, this chart has each input color coded! Grey out the ones you don't need 😊**



- Household & Personal Goods
- Prepared/Packaged Foods
- Beverages
- Snacks & Sweets
- Fresh Foods 39
- Pantry/Staples



Idea Screening task: We are going to show you some products. If you have changed how or what you buy or spend on it due to inflation, swipe right or click the ✓. If you have not changed how or what you buy or spend on it due to inflation, swipe left or click the 'X'. If you swipe right or give a ✓ to more than one product, you will be asked to select the one that has been most impacted by inflation.

Base: Americans completing Upside module (n=1213)

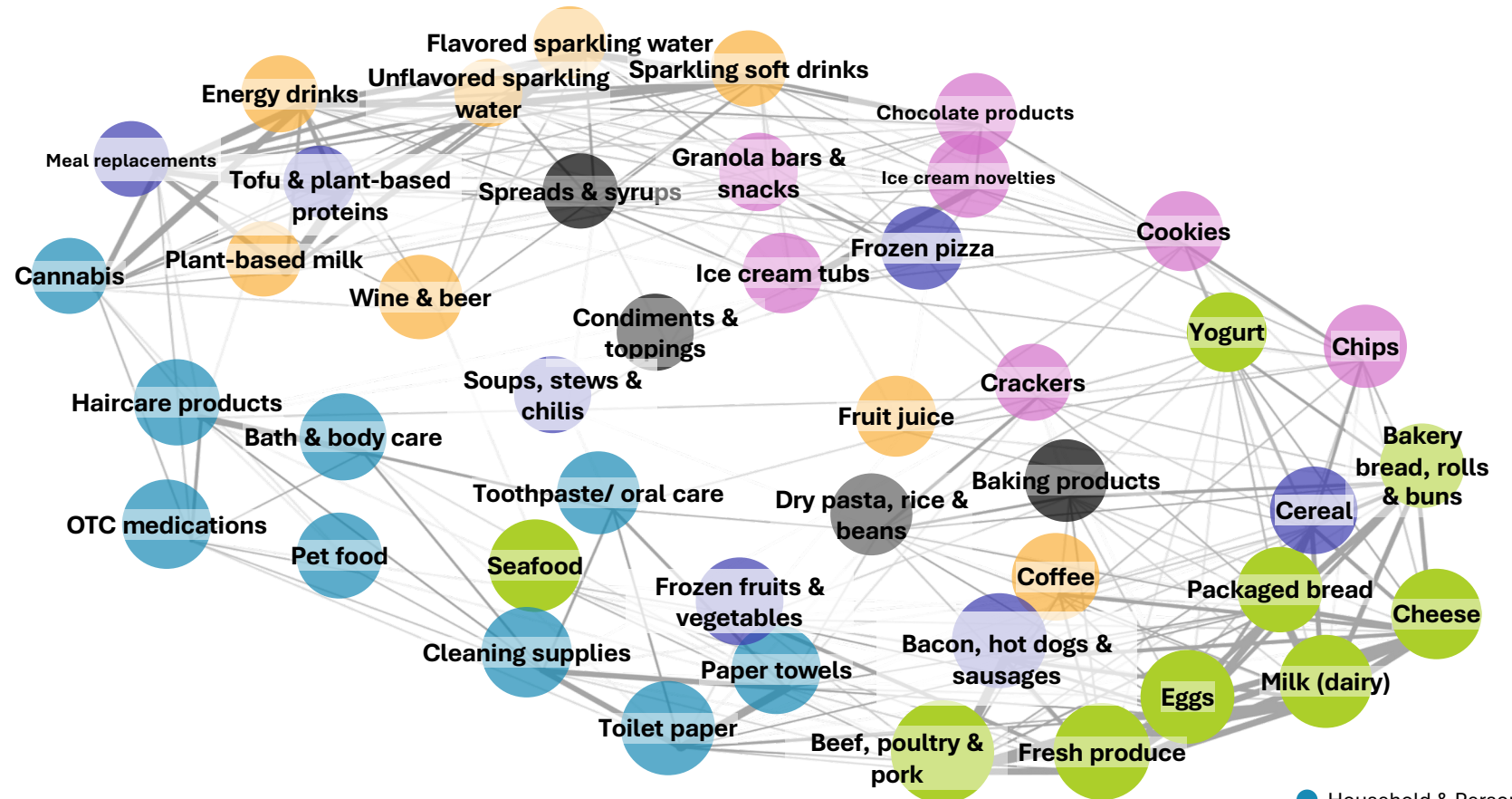


Through a network map we can see the relationships across product categories. If consumers are adapting to inflation for one item, they are likely also adjusting for adjacencies.

### How to read a Network Map

Connective lines indicate consumers impacted by inflation in one category are also making changes in how they shop adjacent categories in response to inflation. The thicker the line, the stronger the relationship.

The relationship between items within the Fresh Foods category have the strongest connections, suggesting that people who have had to change their buying habits of one fresh food item have changed their buying habits of most fresh food items.

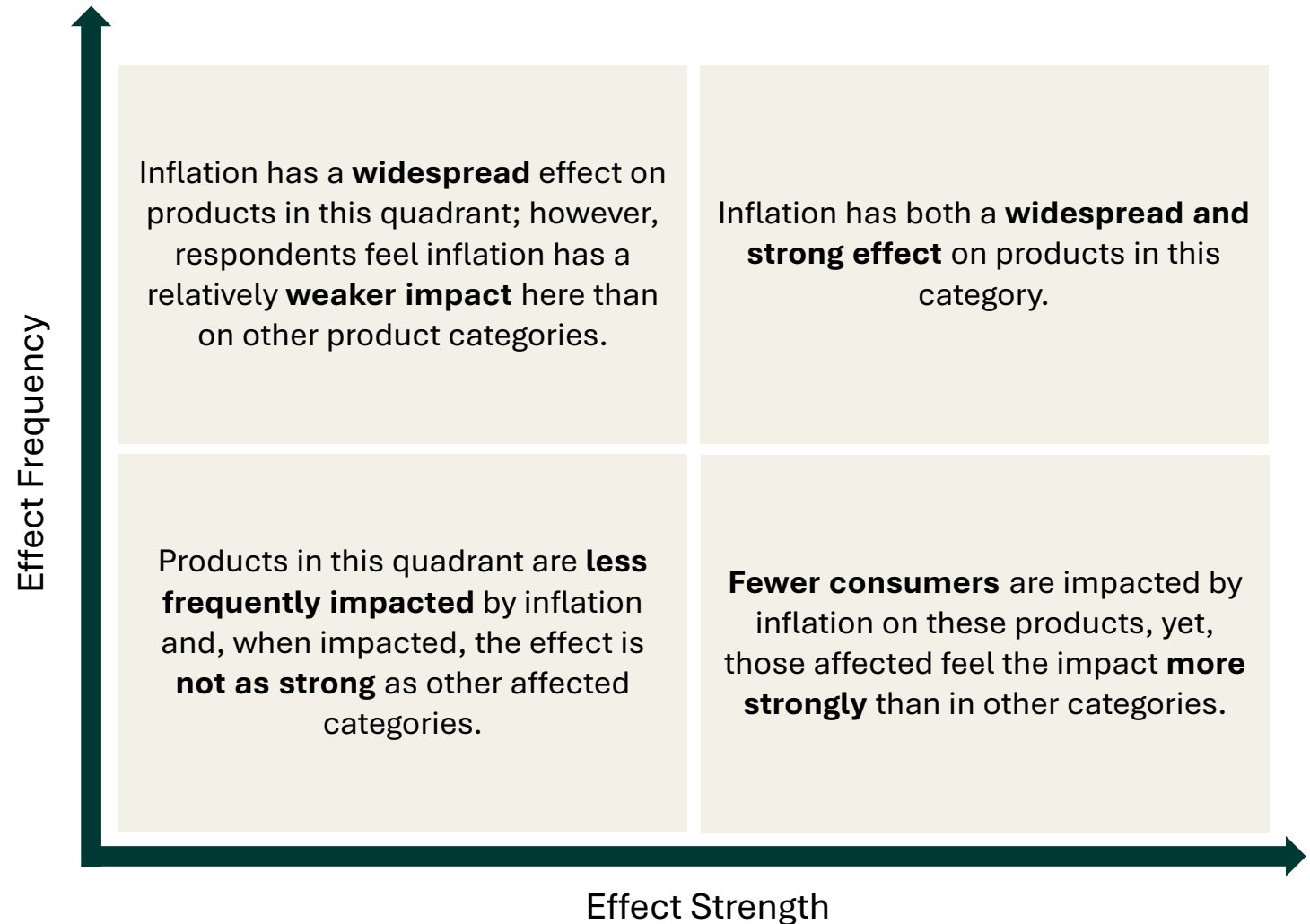


- Household & Personal Goods
- Prepared/Packaged Foods
- Beverages
- Snacks & Sweets
- Fresh Foods **40**
- Pantry/Staples

# Inflation Impact Score = Frequency + Strength

The **Inflation Impact Score** is a combination of the **2 key metrics** assessed in the Idea Screen exercise.

The **Frequency** and **Strength** of inflation's effect on each product illustrate the impact inflation has on purchase behavior in a multi-dimensional way.





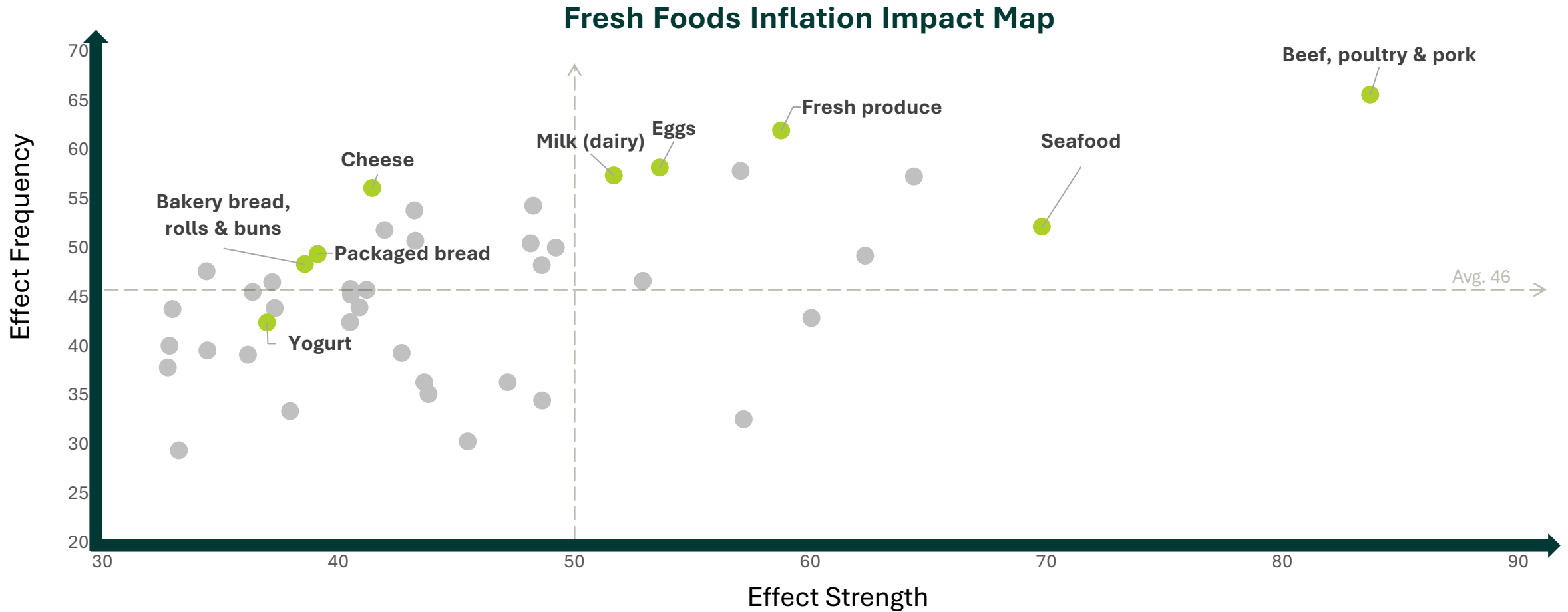
Comparatively, fresh foods have most impacted consumer purchase behaviours as a result of inflation, while snacks & sweets and beverages have been more resilient.







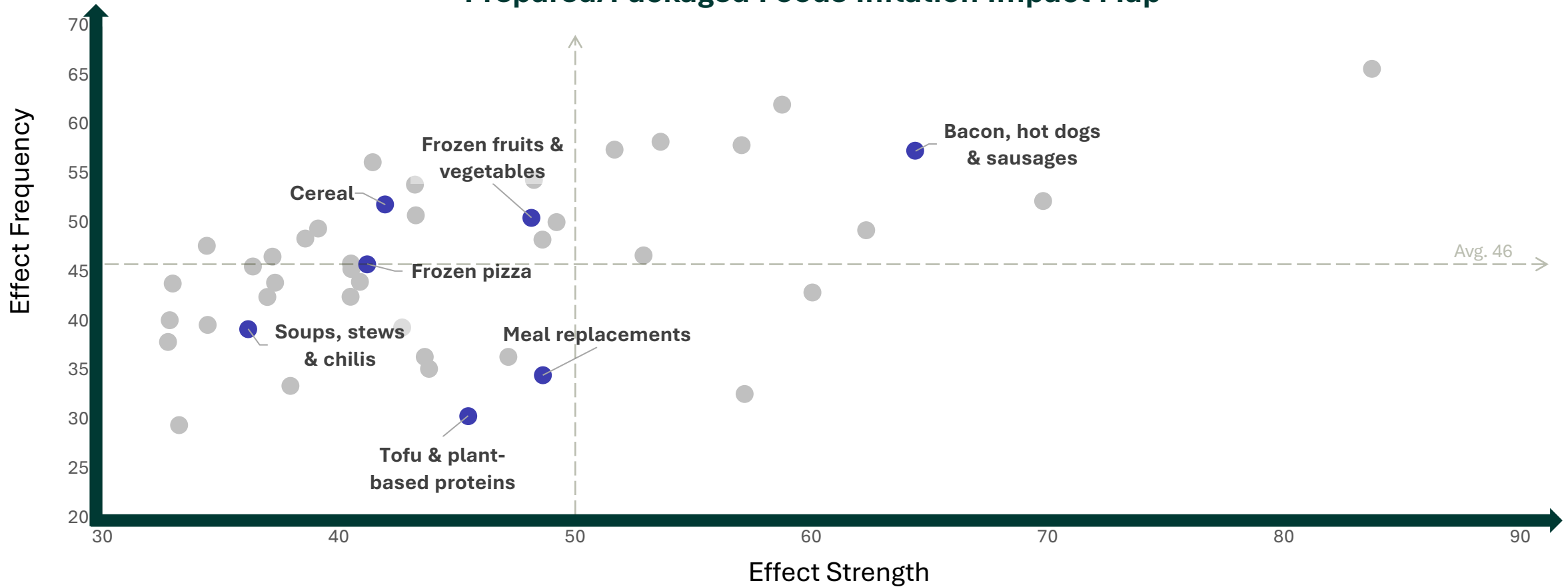
Proteins, produce and dairy have been most impacted by inflation within the fresh food sector. High frequency of purchase, wide fluctuations and supply chain considerations likely contribute.





While consumers are particularly likely to note inflation in packaged foods such as cereals and frozen produce, behaviour has been most notably impacted in processed meats.

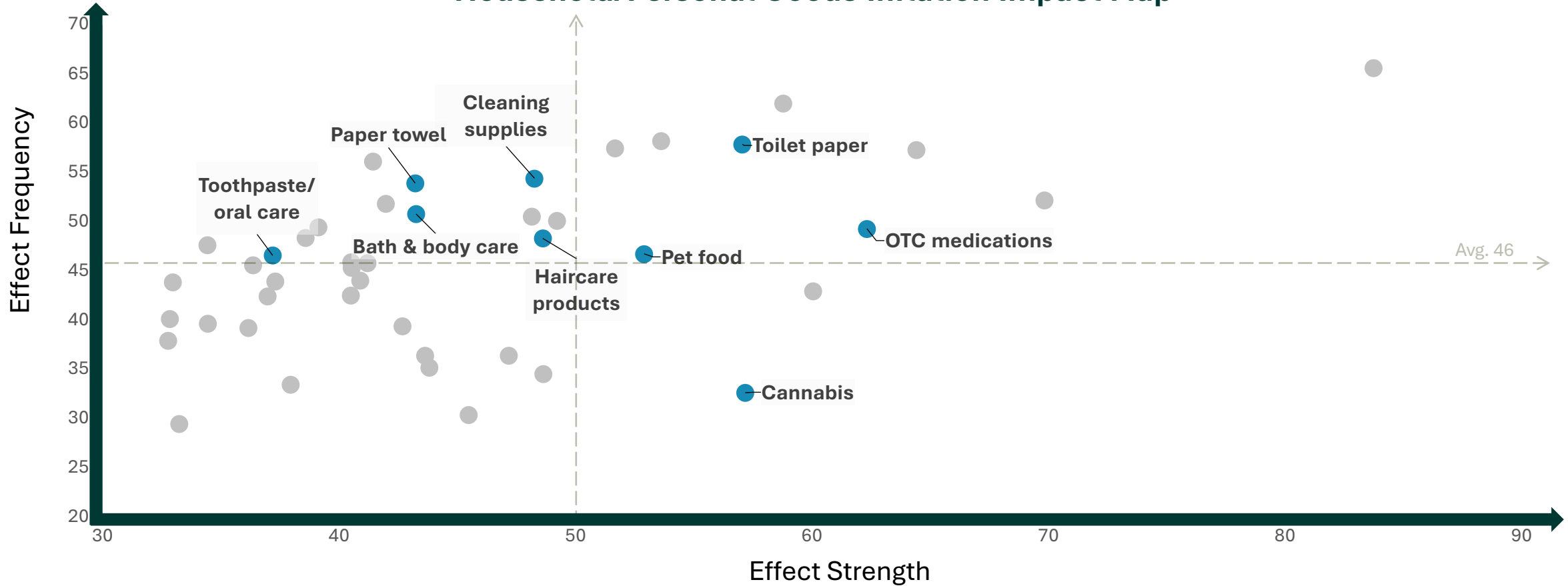
### Prepared/Packaged Foods Inflation Impact Map





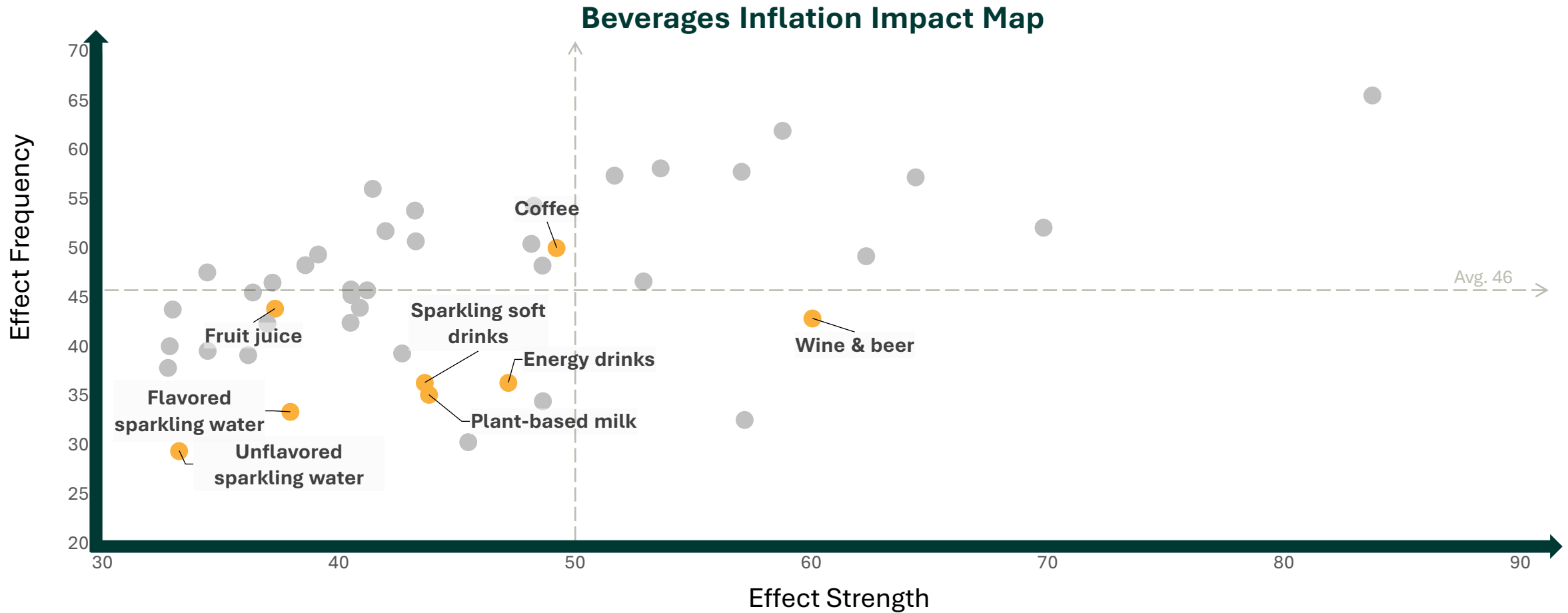
Household & Personal Goods have been widely affected by inflation – particularly toilet paper and OTC medications. While fewer Americans have been impacted by pet food and cannabis, the effect of inflation is felt very strongly by these consumers.

### Household/Personal Goods Inflation Impact Map



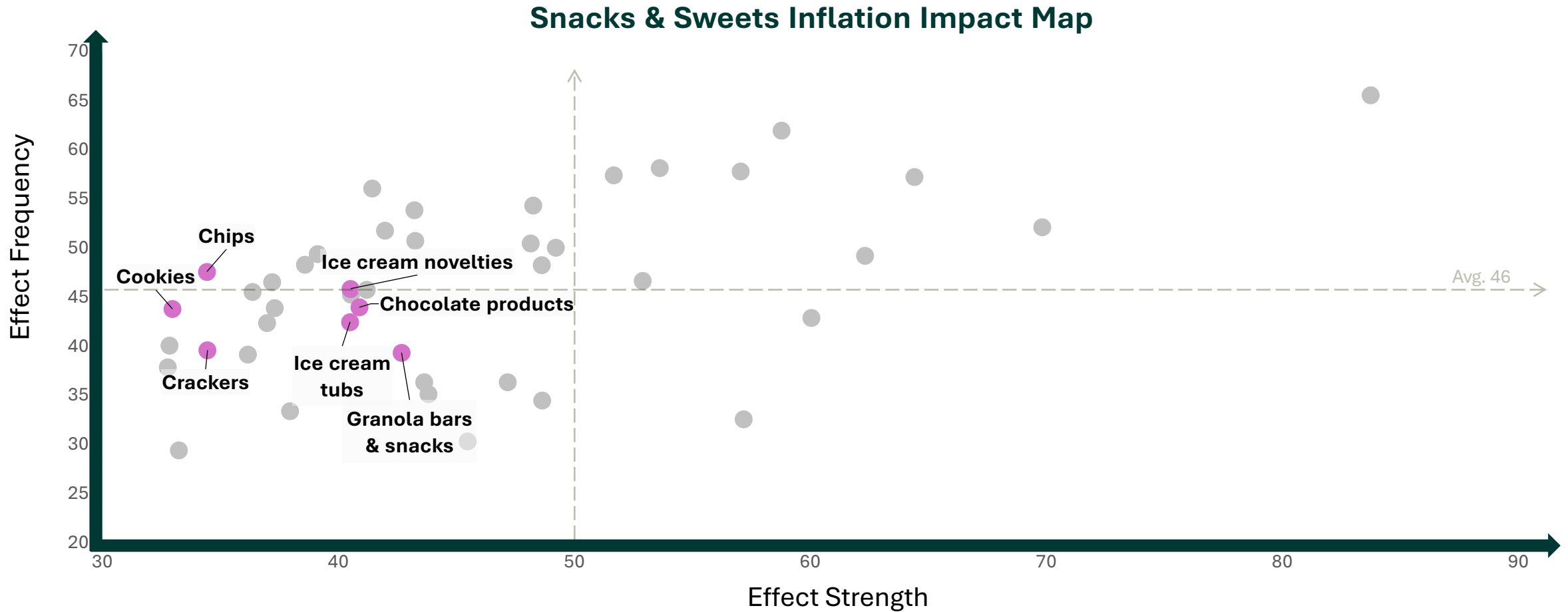


Consumers are less likely to report they have been impacted by inflation within the beverage category versus other product areas, suggesting they may be more willing to continue with engrained habits versus making accommodations in this space.



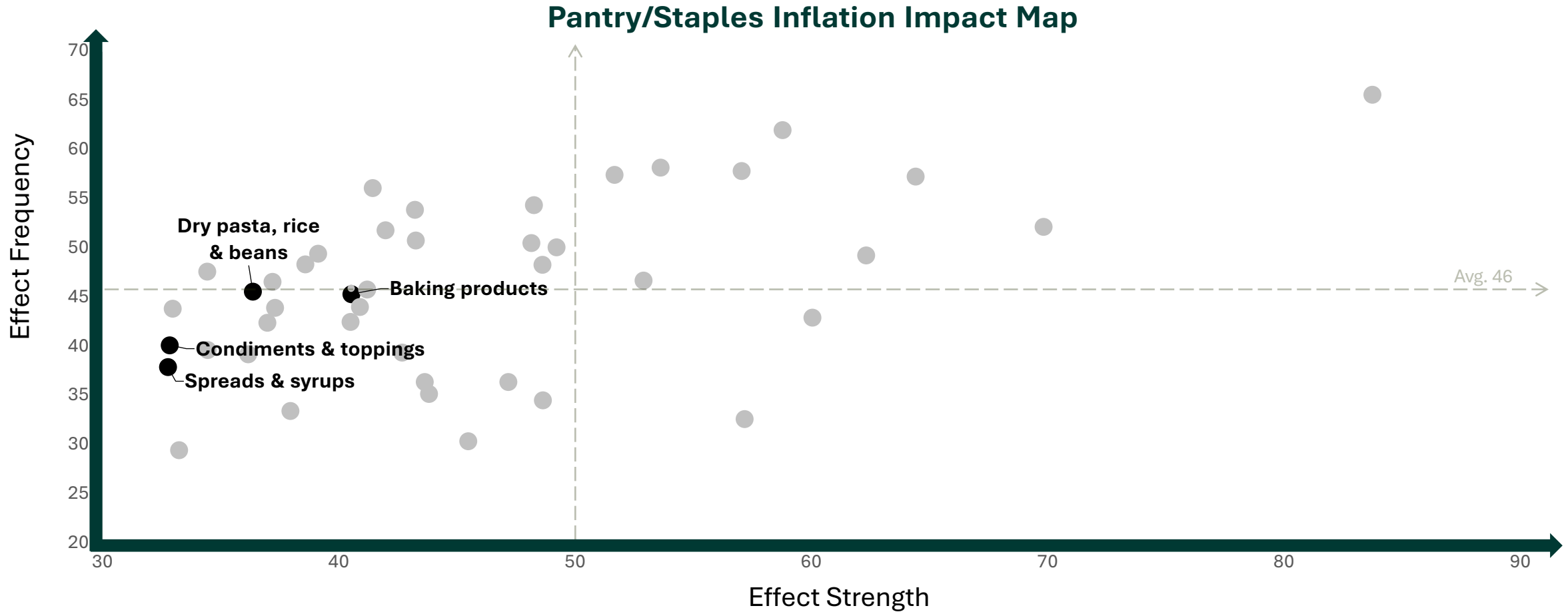


Snacks & sweets are quite resilient in the face of inflation, perhaps because they are purchased less frequently than other categories, or that consumers are willing to splurge on ‘treats’ when making accommodations in other areas.





The purchase of Pantry and Staple items has not changed much due to inflation. Those impacted are not making dramatic changes to their purchase habits in comparison to other categories.







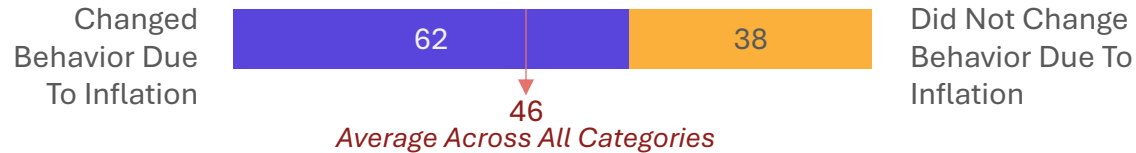
# Detailed Category Snapshots - US

**INTERNAL NOTE: If you are pulling this deck for a client, select only the category snapshots of interest for your client. Delete this transition slide and any non-relevant categories/markets.**

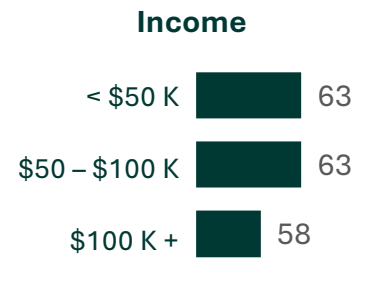
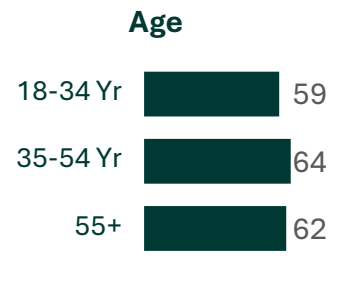
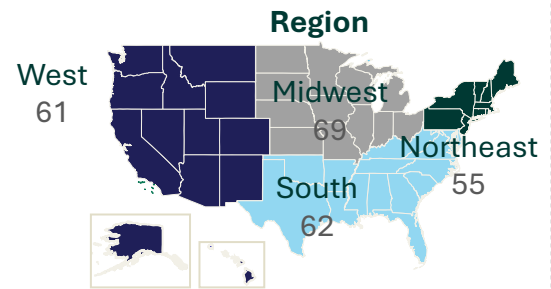
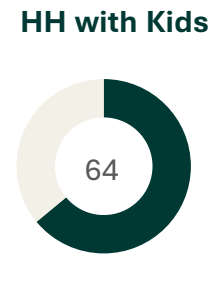
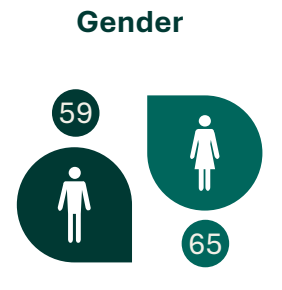
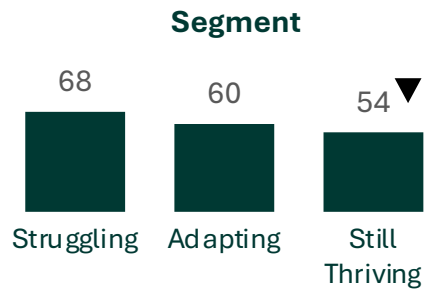


# Fresh Produce - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

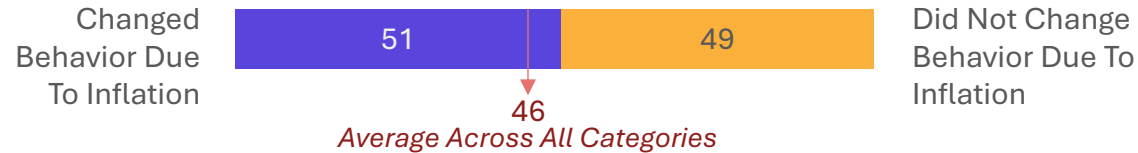


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

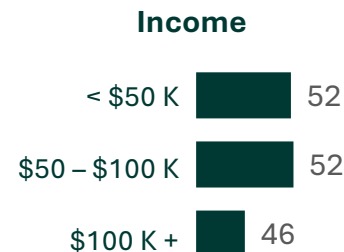
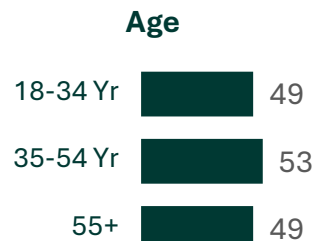
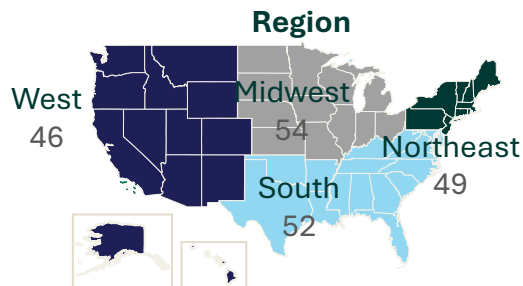
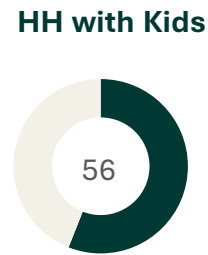
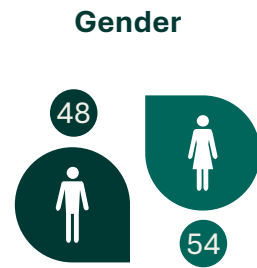
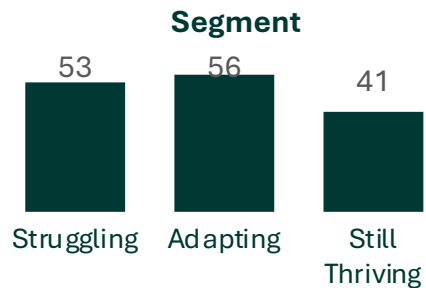


# Frozen Fruits & Vegetables - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

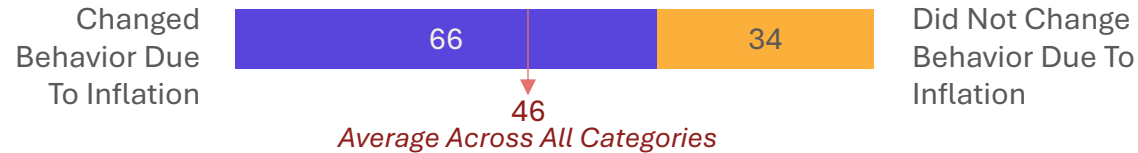


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

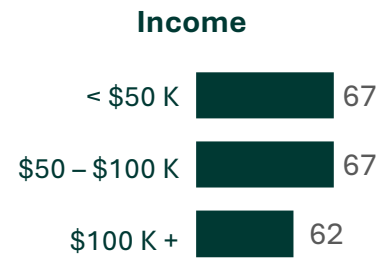
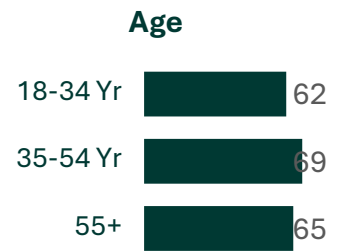
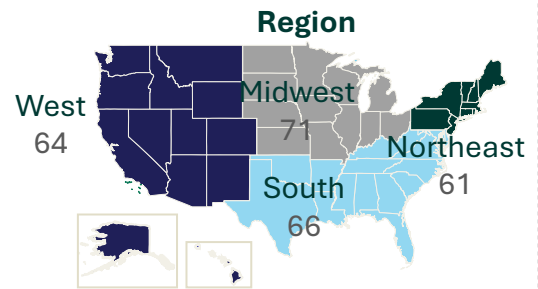
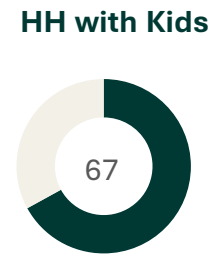
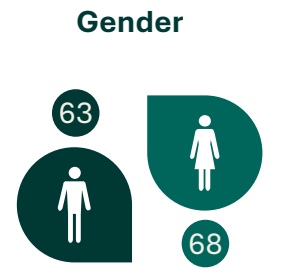
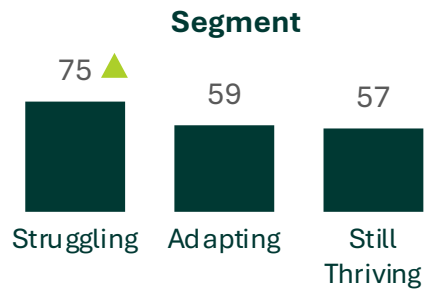
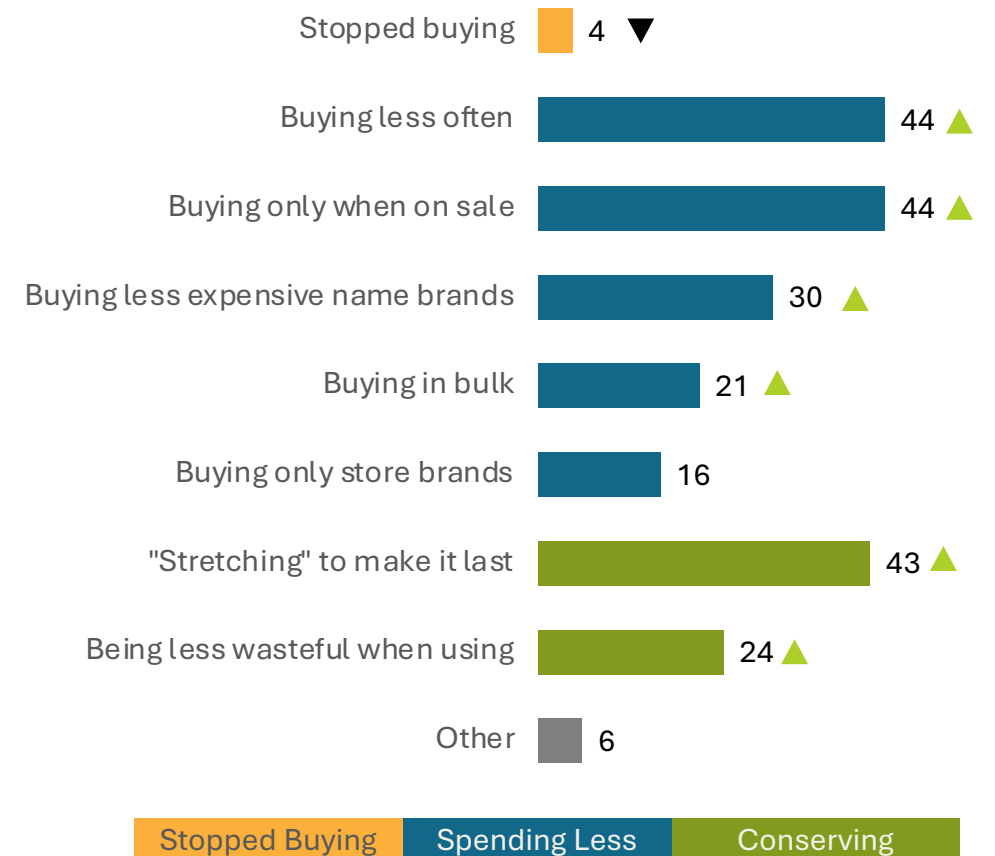


# Beef, Poultry & Pork - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

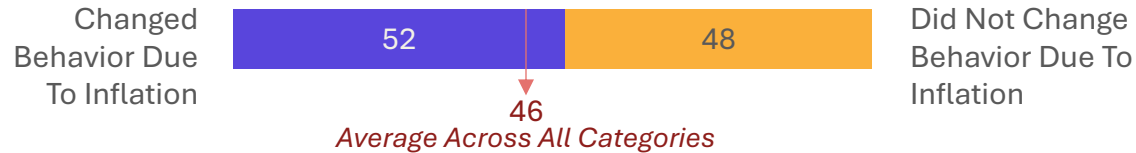


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

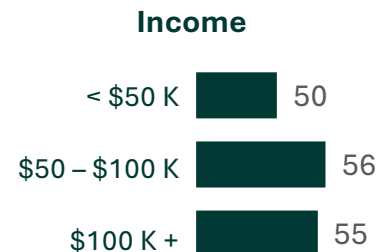
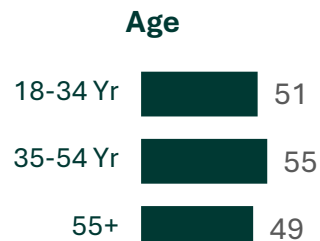
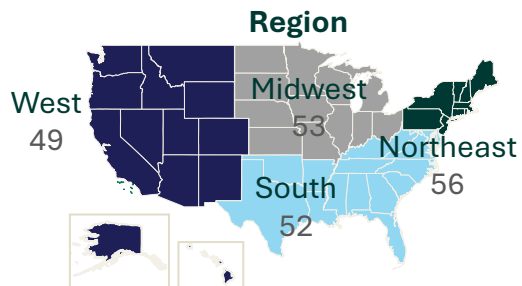
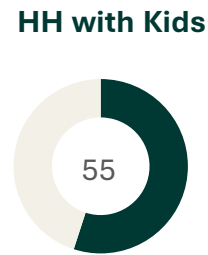
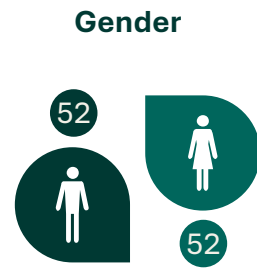
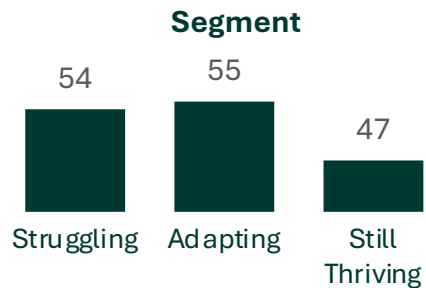
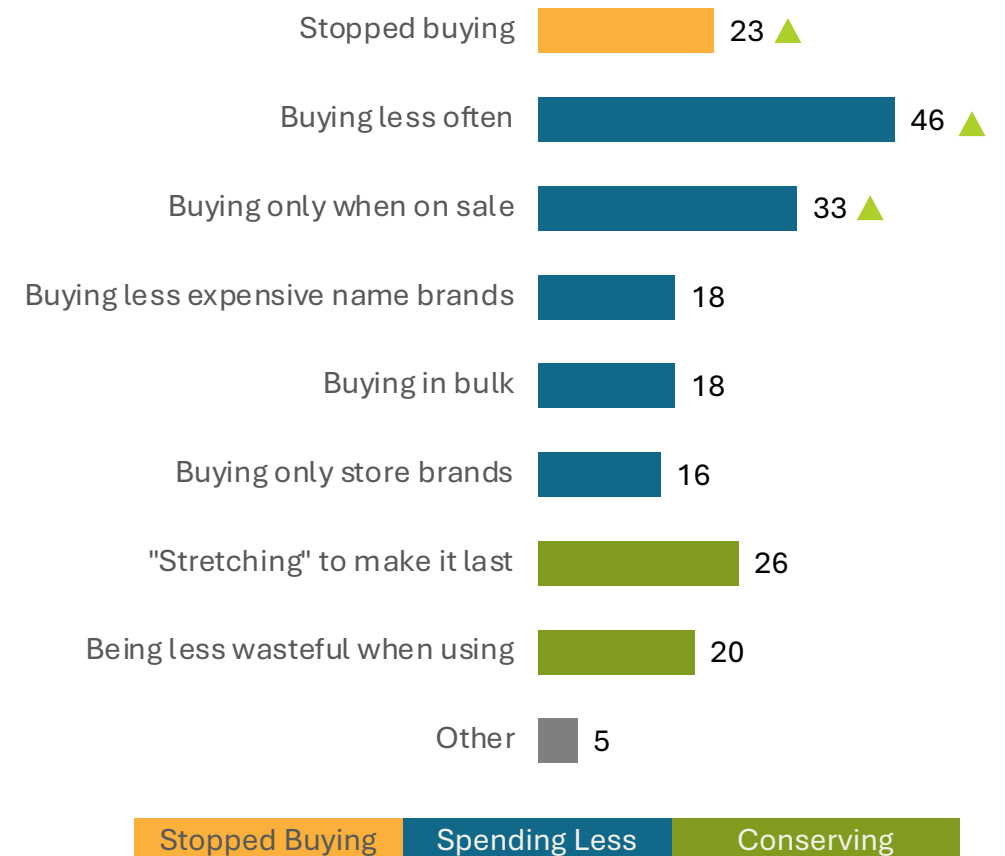


# Seafood - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

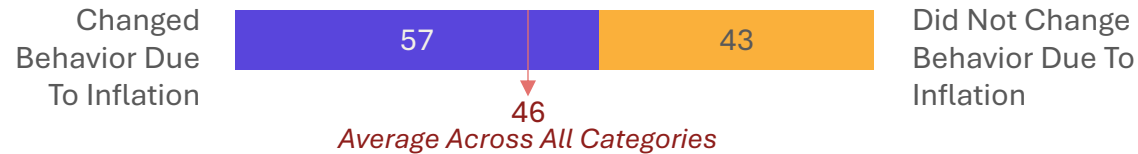


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

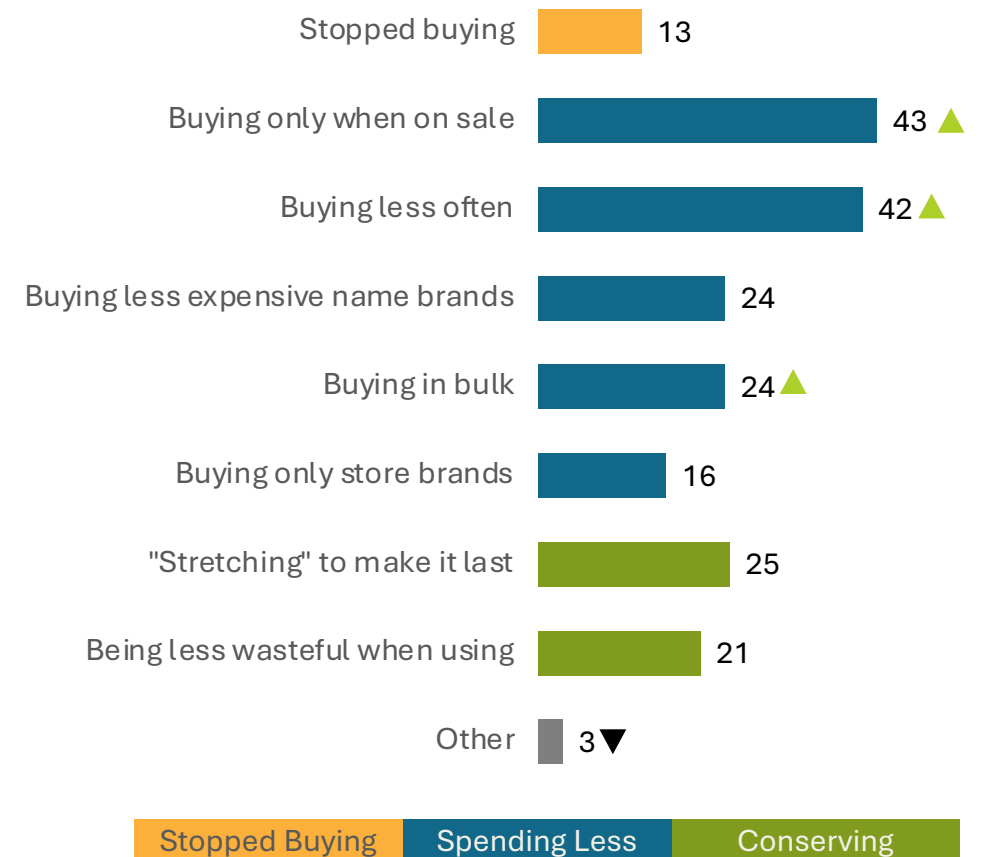


# Bacon, Hot Dogs & Sausages - Response to Inflation

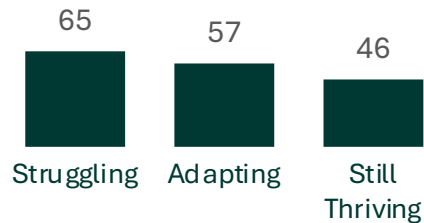
## Impact on Behavior Due To Inflation (% Selected)



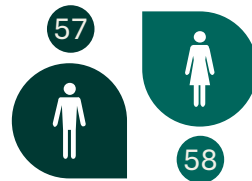
## Change In Behavior Due To Inflation\*\* (% Selected)



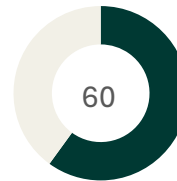
### Segment



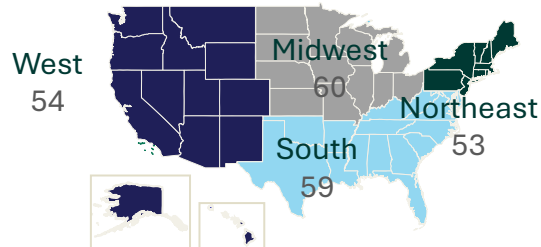
### Gender



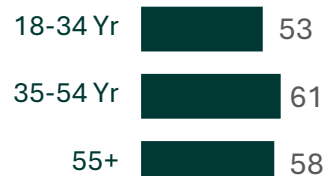
### HH with Kids



### Region



### Age



### Income



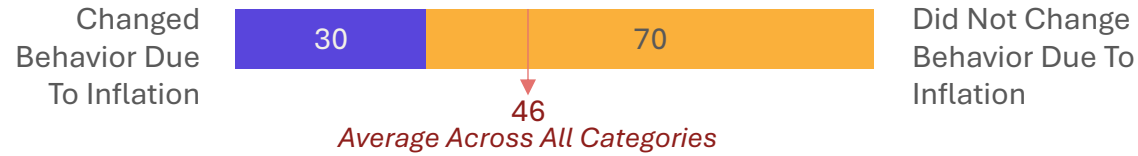
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



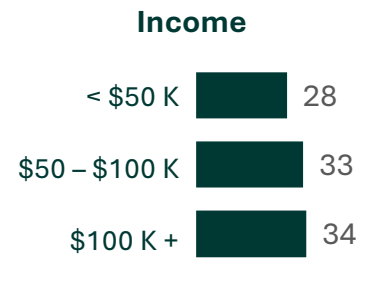
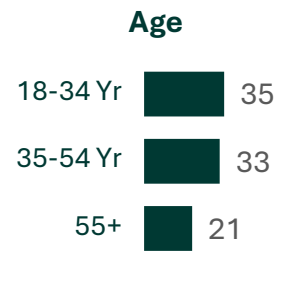
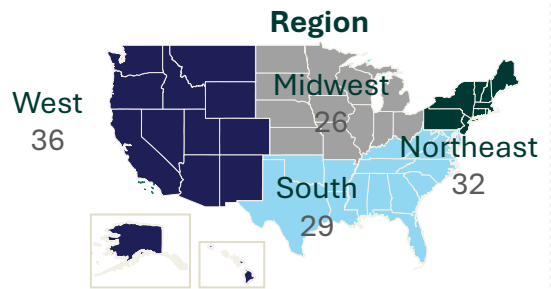
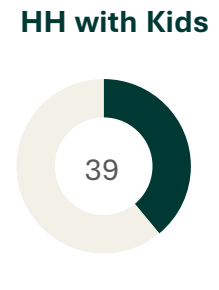
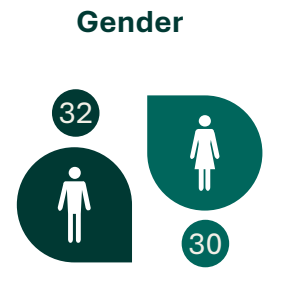
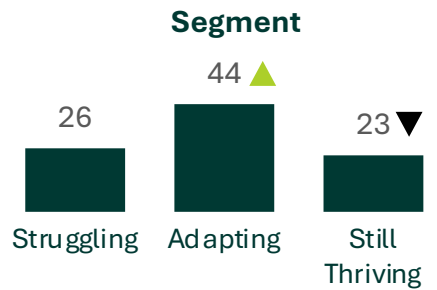


# Tofu & Plant-based Proteins - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



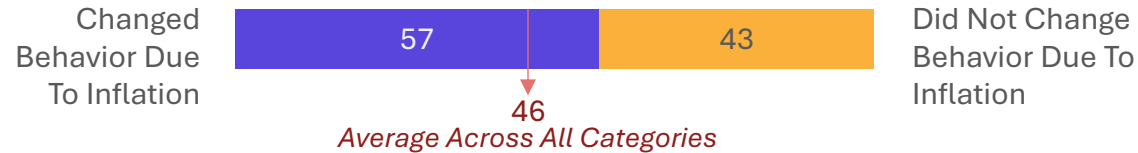
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

Q17. If you have changed how or what you buy or spend on it due to inflation, swipe right or click the ✓. If you have not changed how or what you buy or spend on it due to inflation, swipe left or click the 'X'. Base: Total American Respondents (n=1531); Q4 (Region), Q2 (Gender), Q23 (HH with Kids), Q3 (Age), Q27 (Income), Base: Americans who have changed their buying behavior due to inflation (n=369). Q20. What are you doing in response to inflation on this product, specifically? Select all that apply. Base: Americans who have changed their buying behavior due to inflation & were assigned to this category (n=158).



# Milk (Dairy) - Response to Inflation

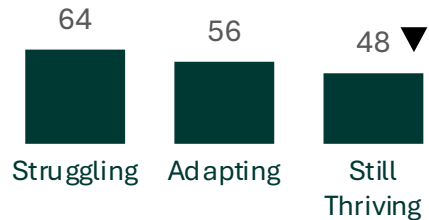
## Impact on Behavior Due To Inflation (% Selected)



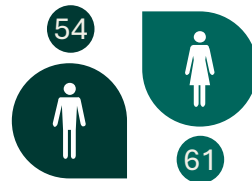
## Change In Behavior Due To Inflation\*\* (% Selected)



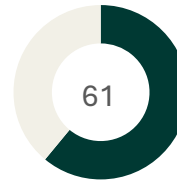
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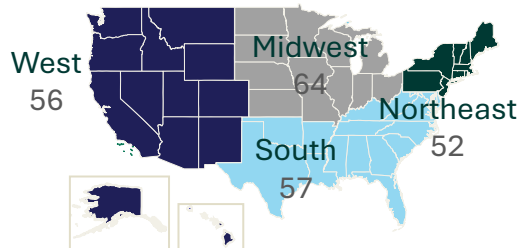
### Gender



### HH with Kids



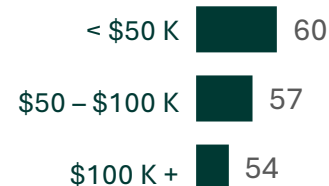
### Region



### Age



### Income

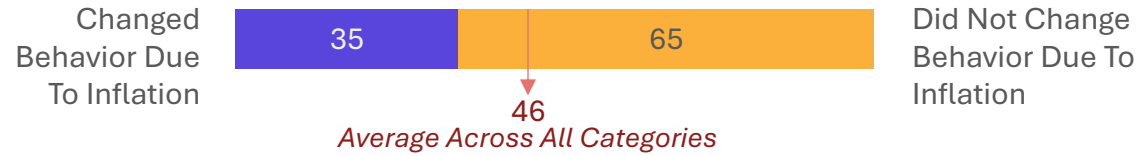


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

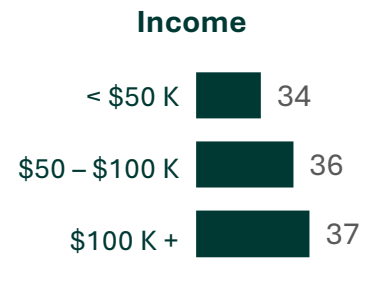
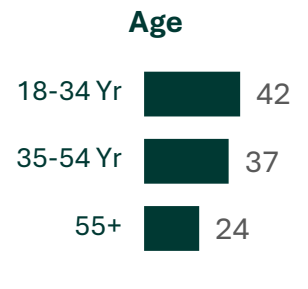
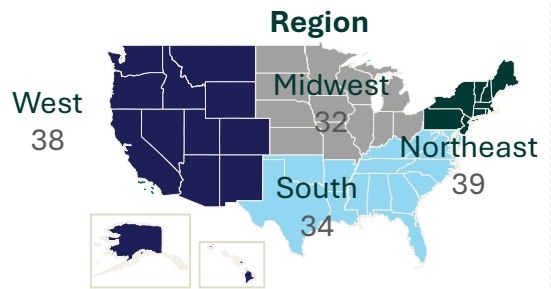
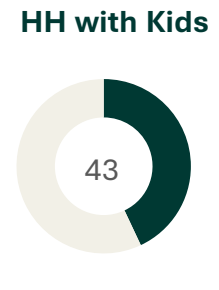
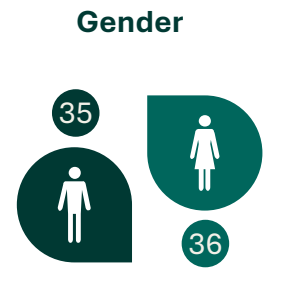
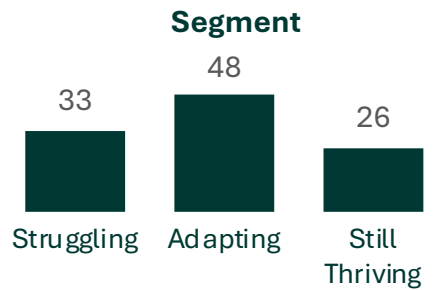


# Plant-based Milk - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

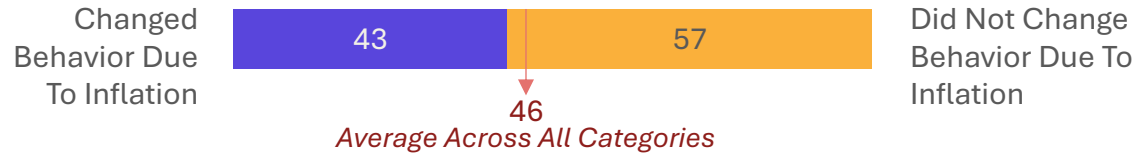


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

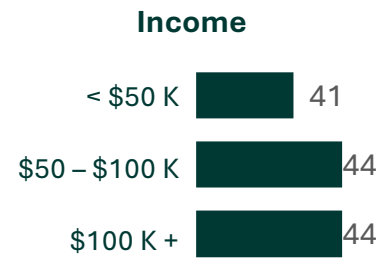
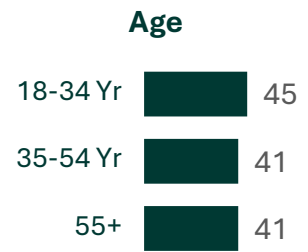
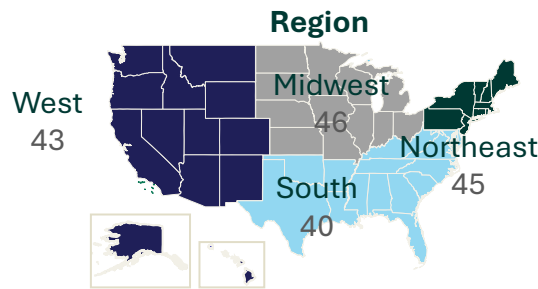
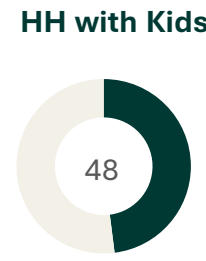
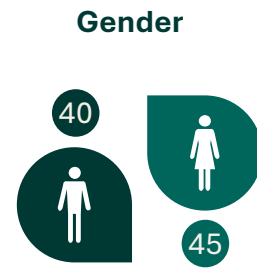
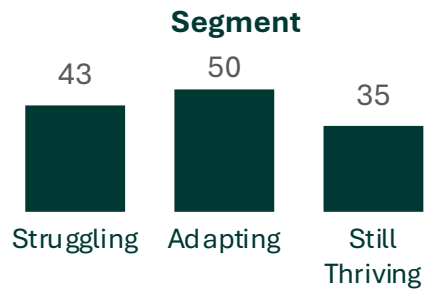


# Yogurt - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

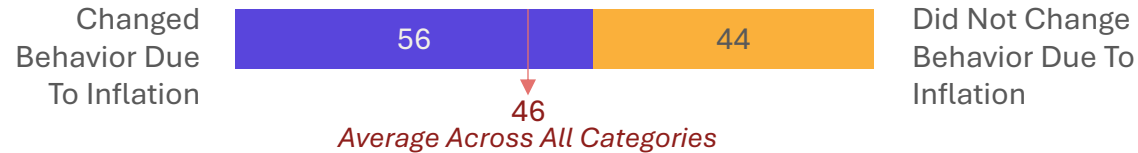


▲▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



# Cheese - Response to Inflation

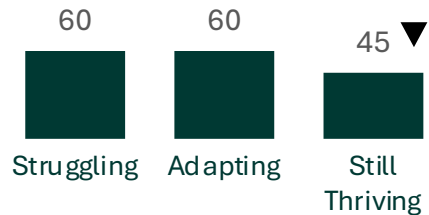
## Impact on Behavior Due To Inflation (% Selected)



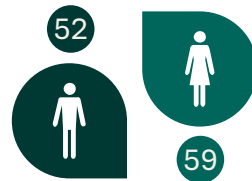
## Change In Behavior Due To Inflation\*\* (% Selected)



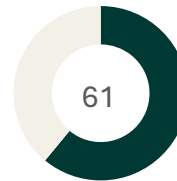
### Segment



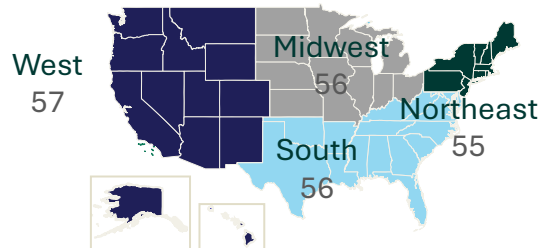
### Gender



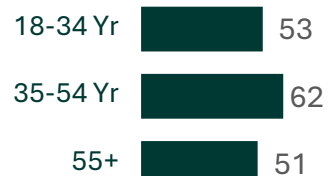
### HH with Kids



### Region



### Age



### Income

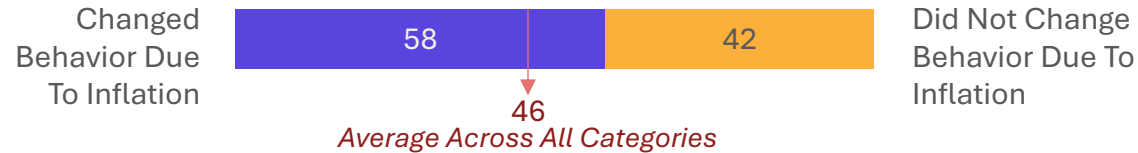


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



# Eggs - Response to Inflation

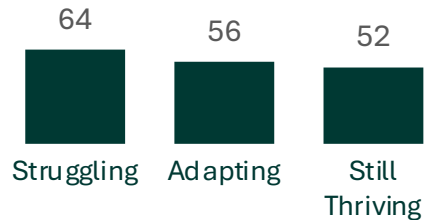
## Impact on Behavior Due To Inflation (% Selected)



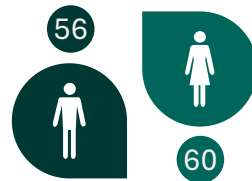
## Change In Behavior Due To Inflation\*\* (% Selected)



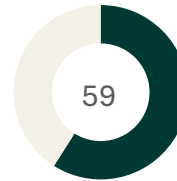
### Segment



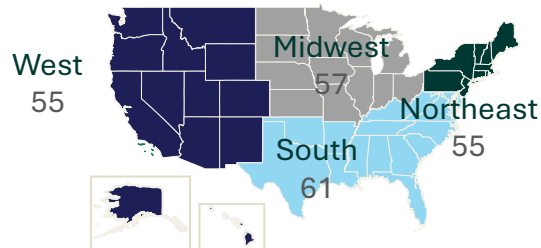
### Gender



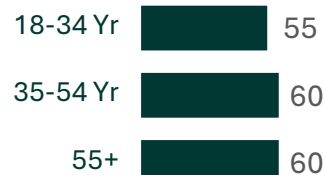
### HH with Kids



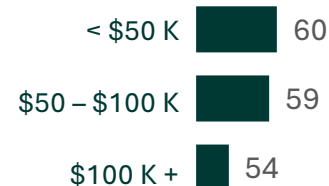
### Region



### Age



### Income



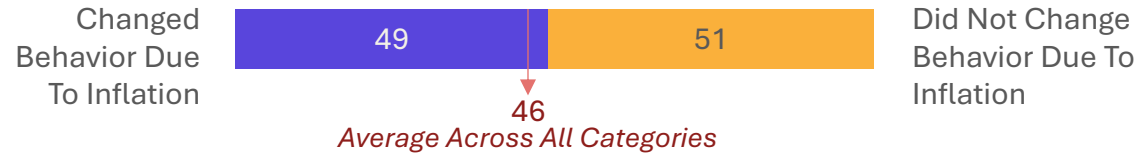
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



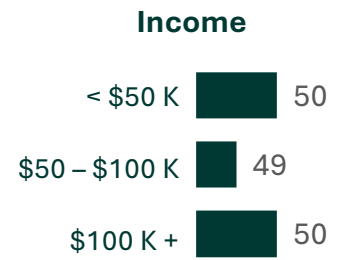
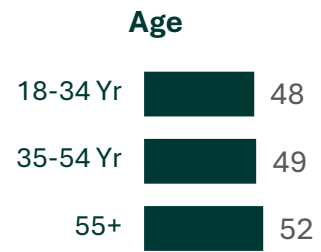
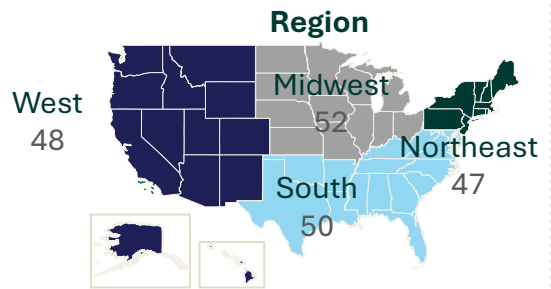
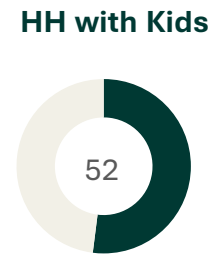
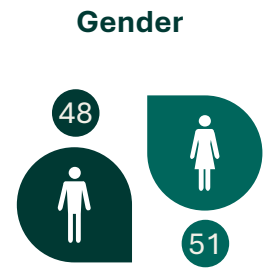
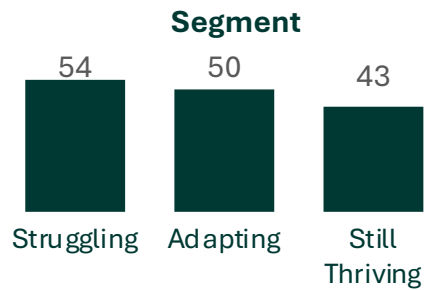


# Packaged Bread - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

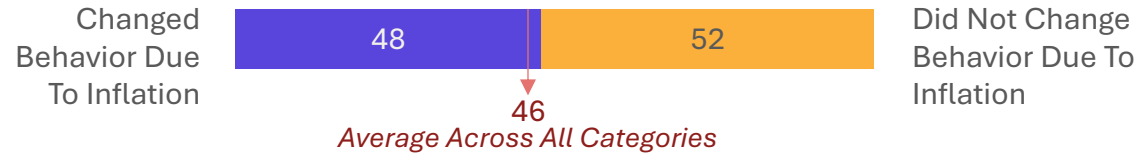


▲▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

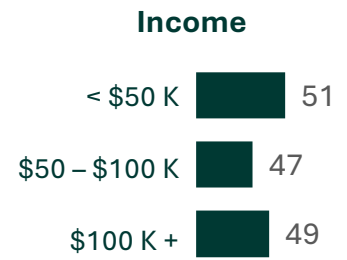
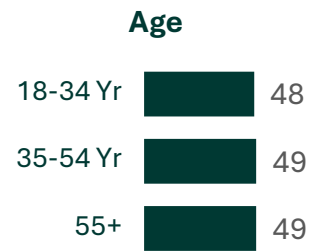
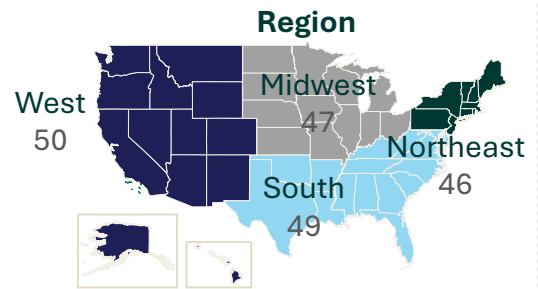
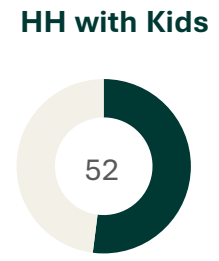
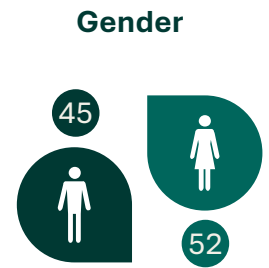
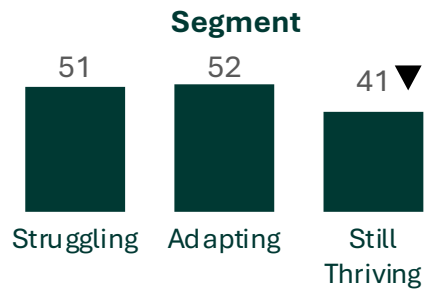


# Bakery Bread, Rolls & Buns - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

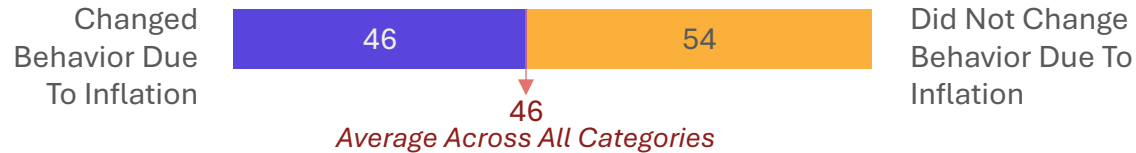


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

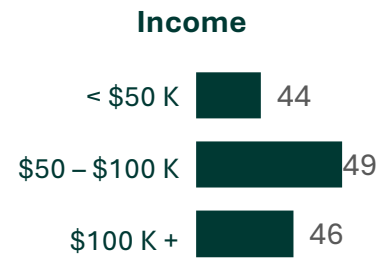
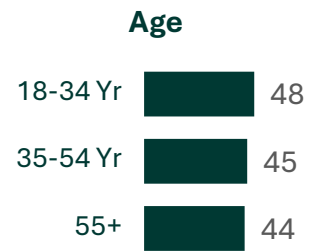
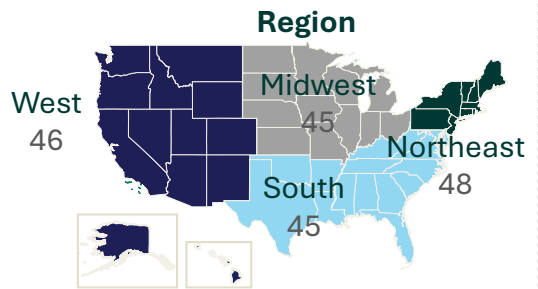
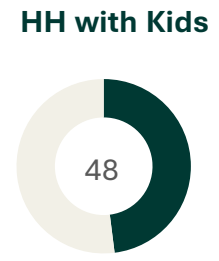
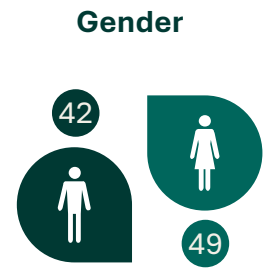
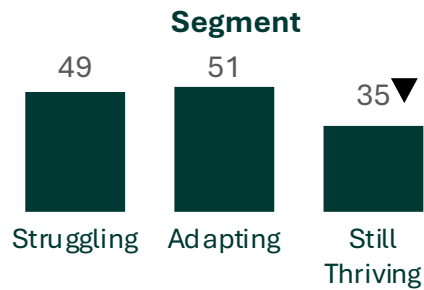
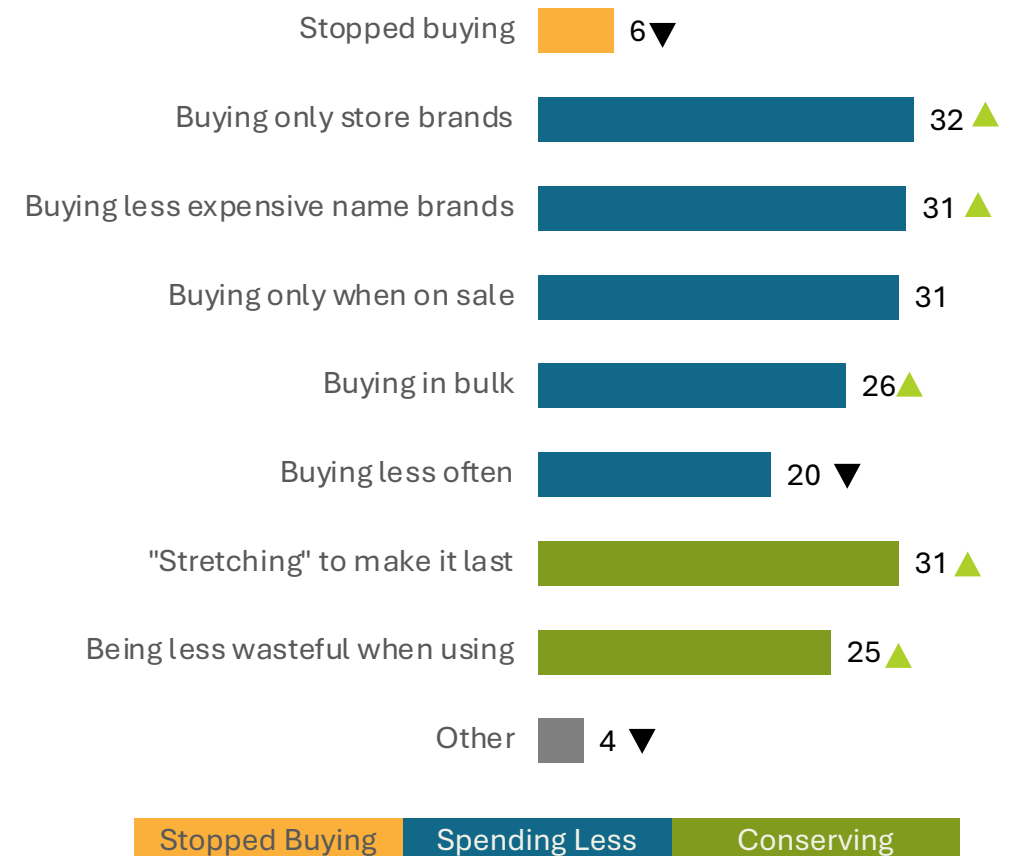


# Dry Pasta, Rice & Beans - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

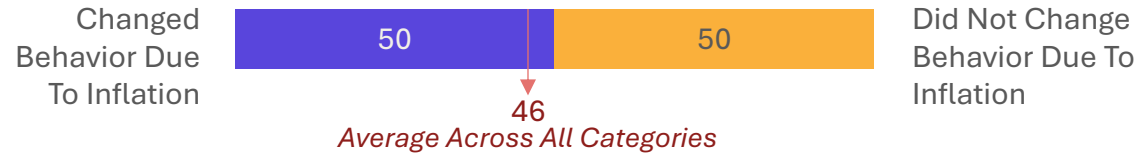


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

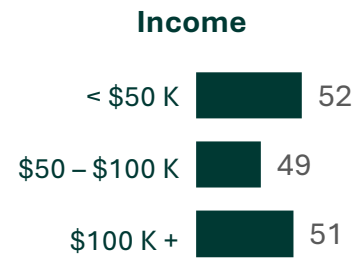
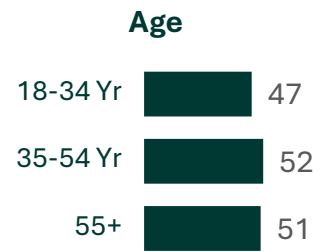
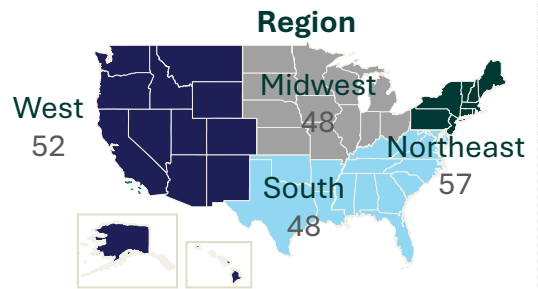
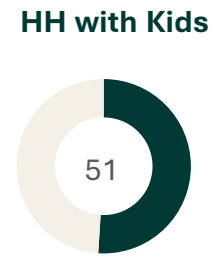
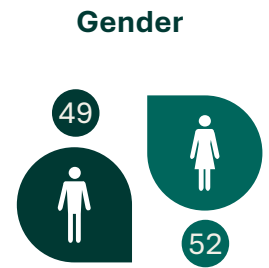
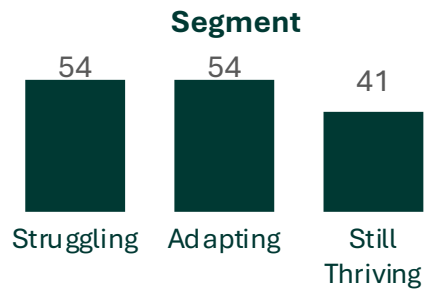


# Coffee - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

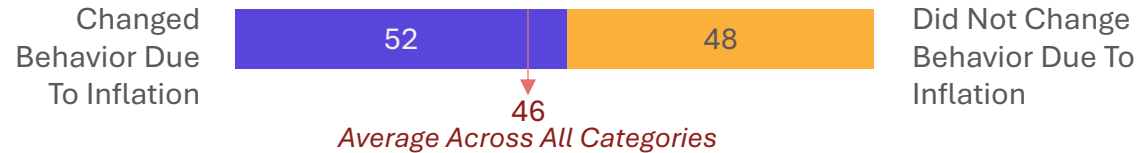


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



# Cereal - Response to Inflation

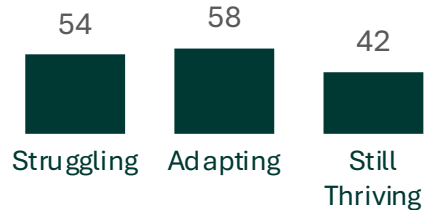
## Impact on Behavior Due To Inflation (% Selected)



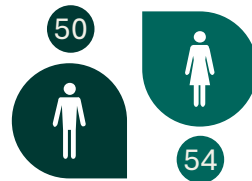
## Change In Behavior Due To Inflation\*\* (% Selected)



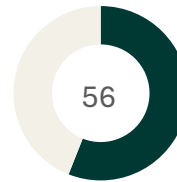
### Segment



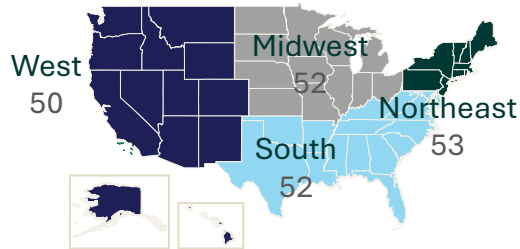
### Gender



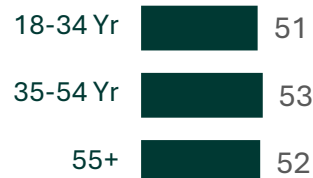
### HH with Kids



### Region



### Age



### Income

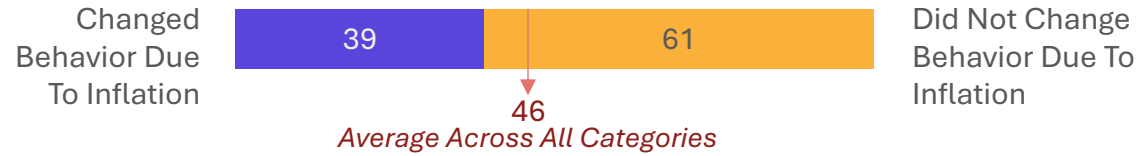


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

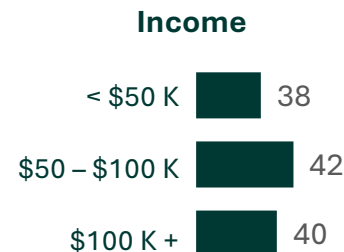
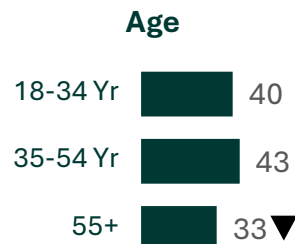
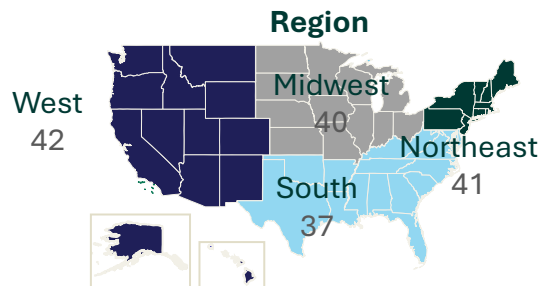
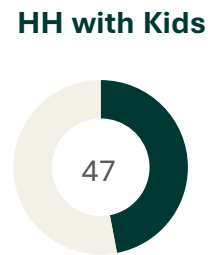
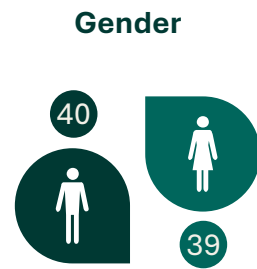
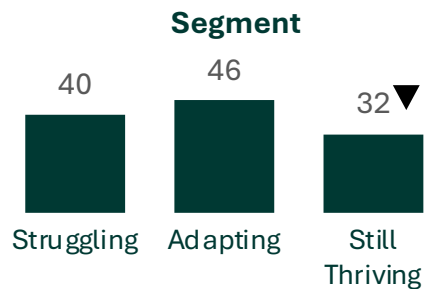


# Granola Bars & Snacks - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



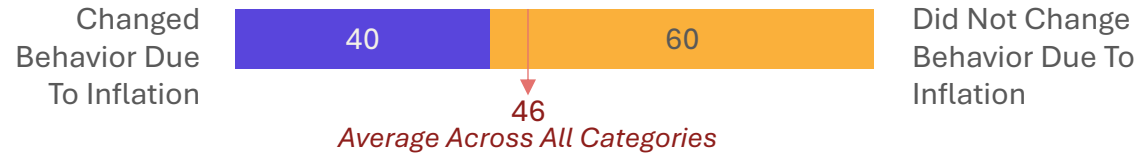
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



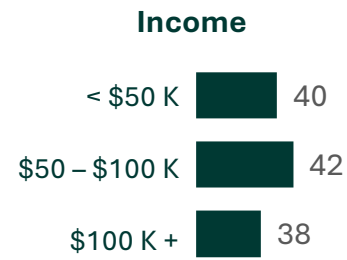
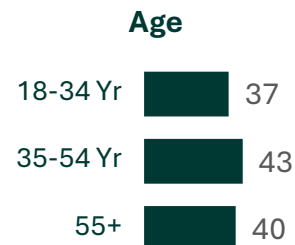
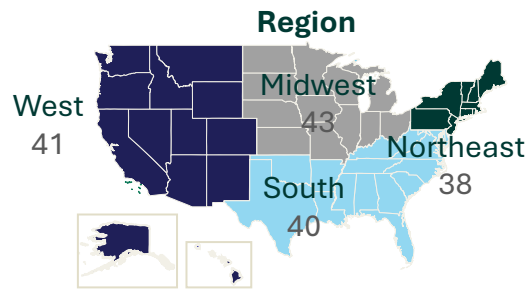
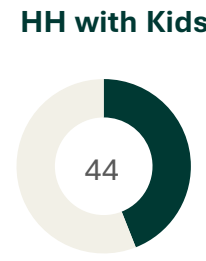
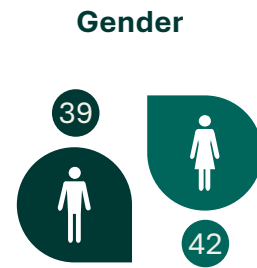
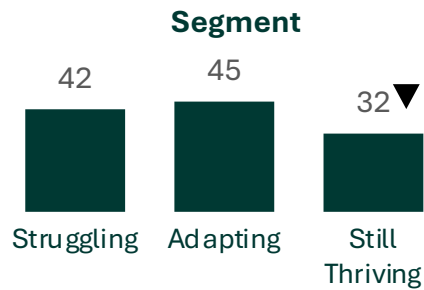


# Condiments & Toppings - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

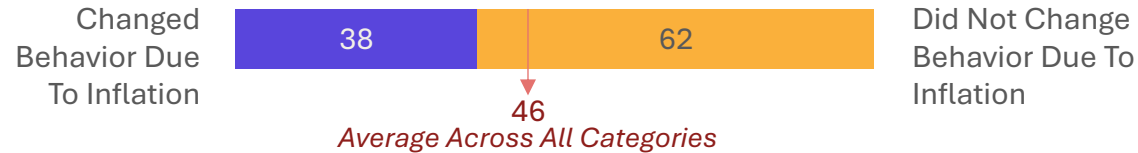


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

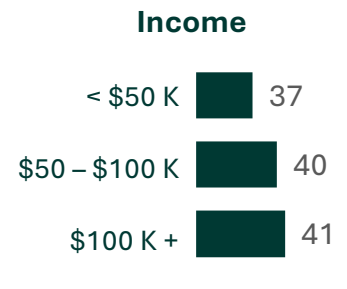
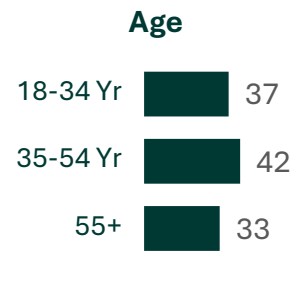
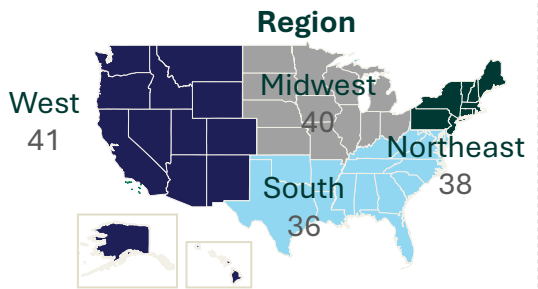
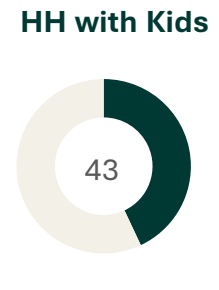
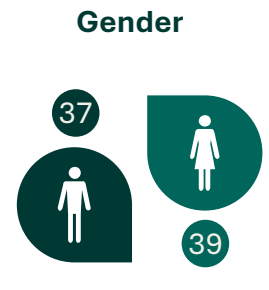
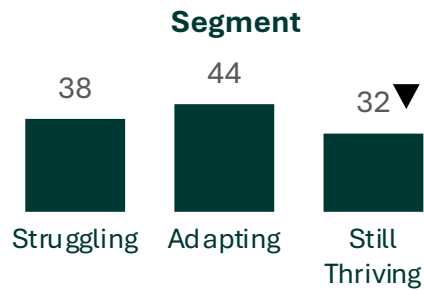


# Spreads & Syrups - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

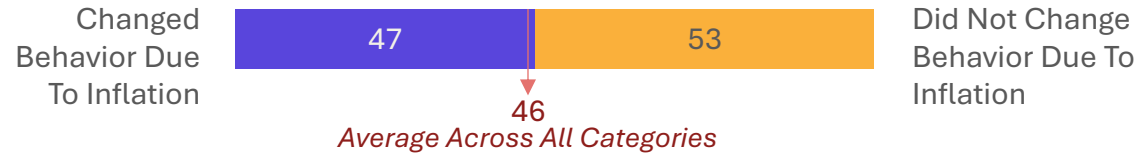


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

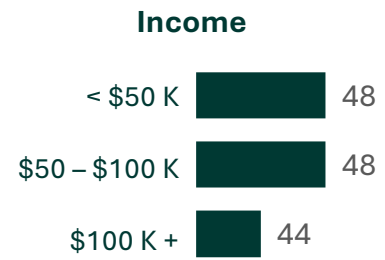
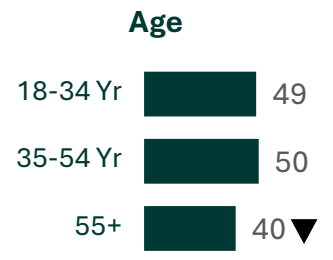
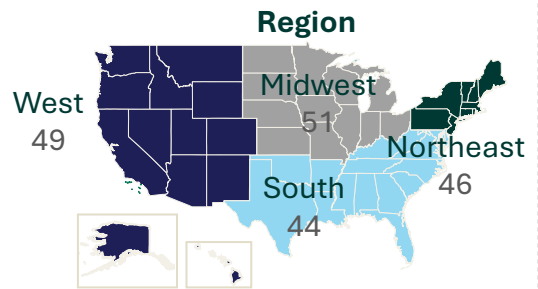
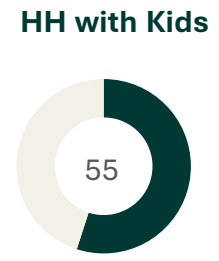
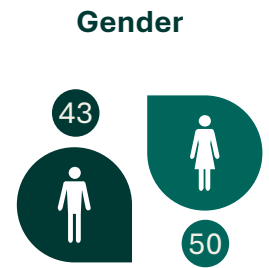
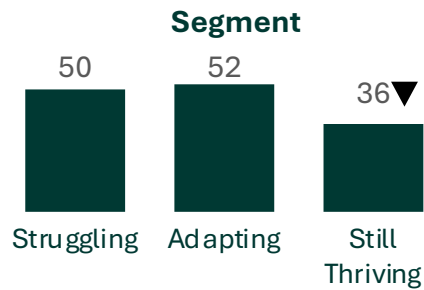


# Pet Food - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

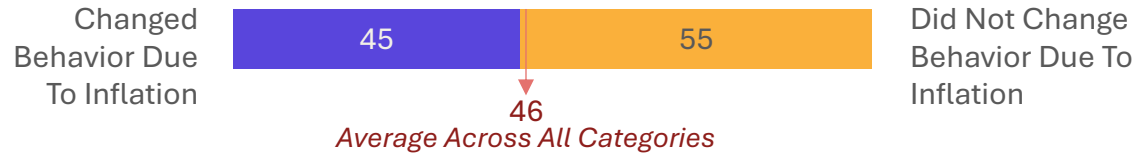


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

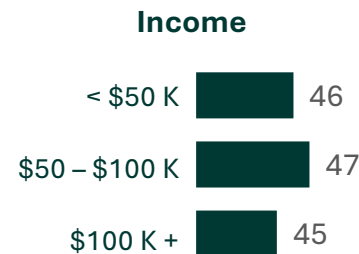
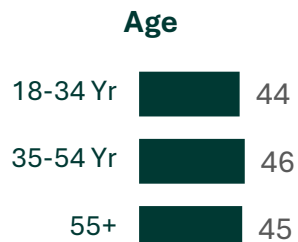
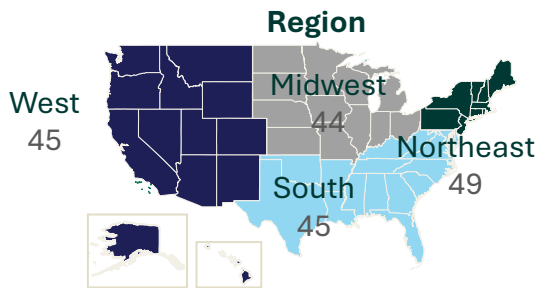
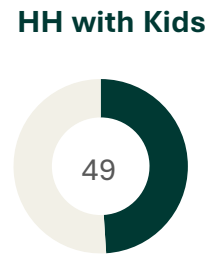
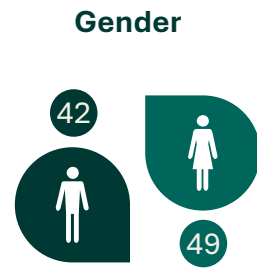
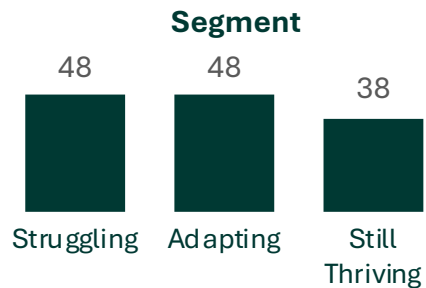


# Baking Products - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



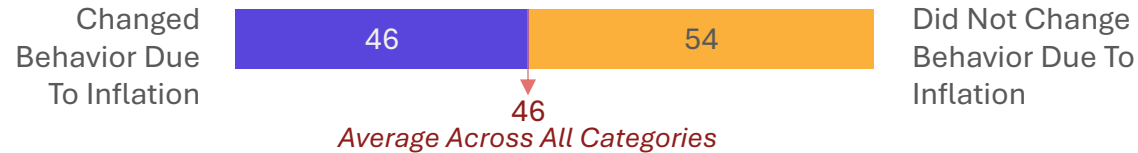
## Change In Behavior Due To Inflation\*\* (% Selected)



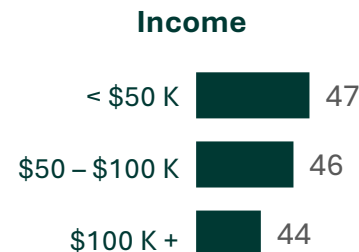
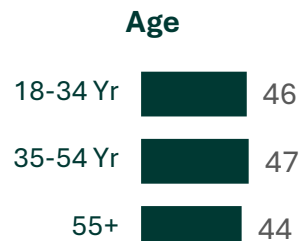
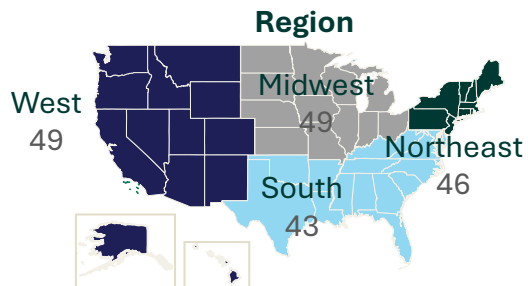
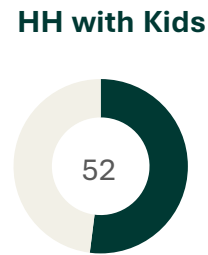
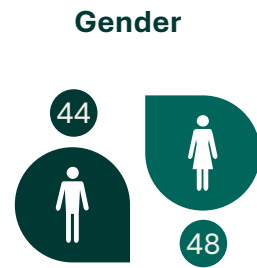
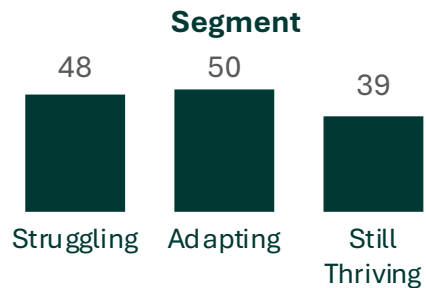


# Frozen Pizza - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



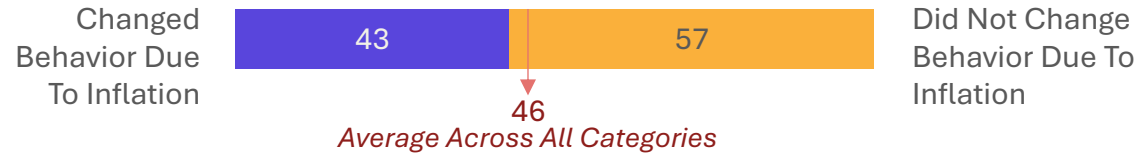
## Change In Behavior Due To Inflation\*\* (% Selected)



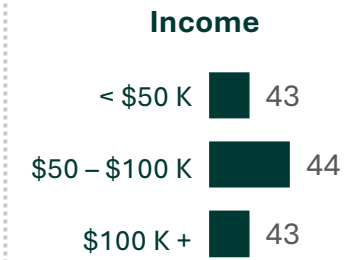
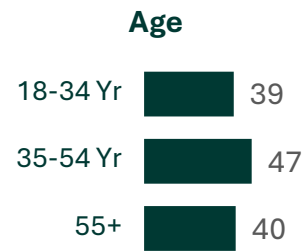
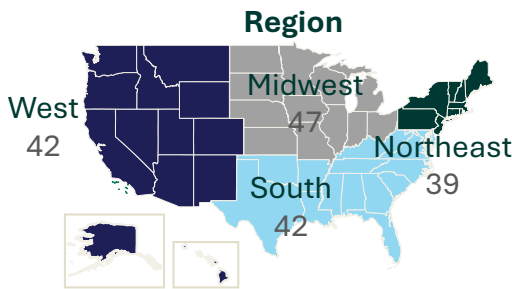
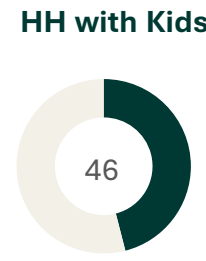
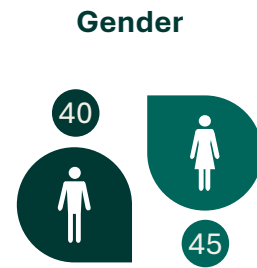
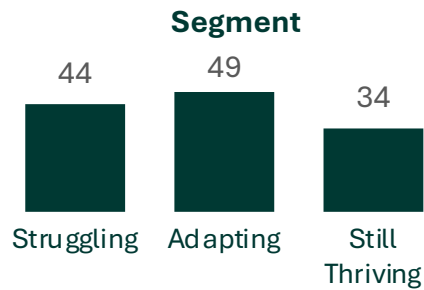


# Ice Cream Tubs - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



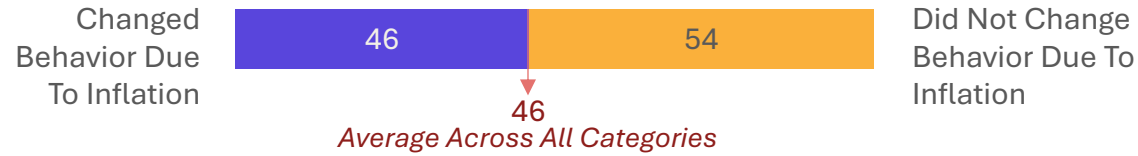
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



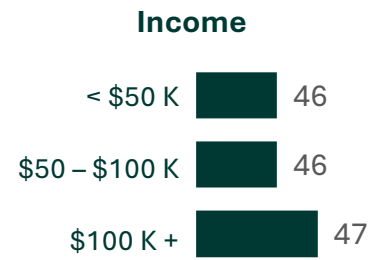
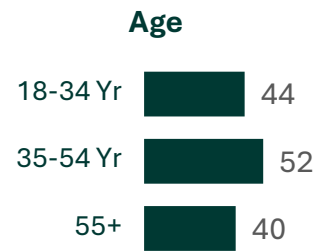
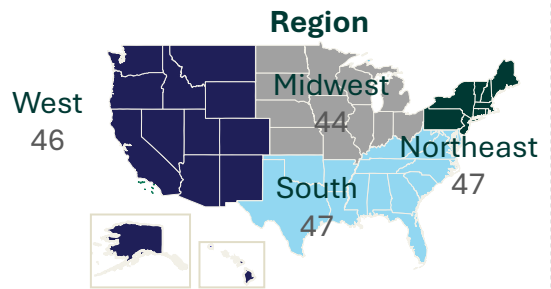
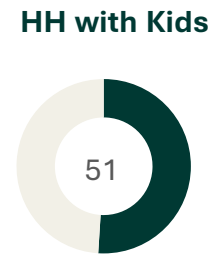
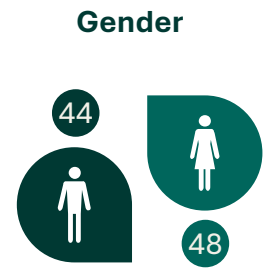
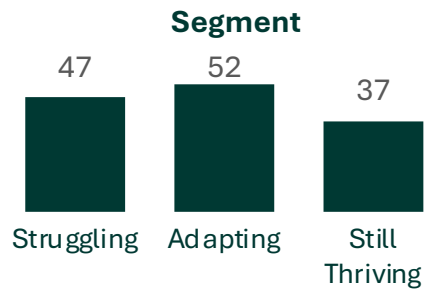


# Ice Cream Novelties - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

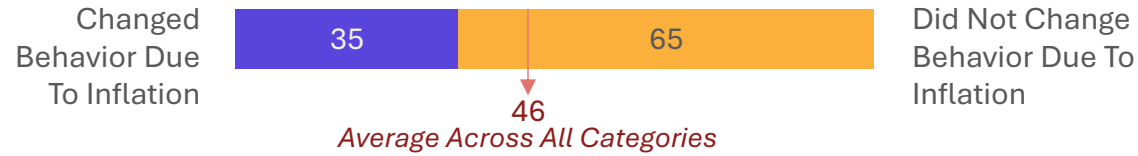


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

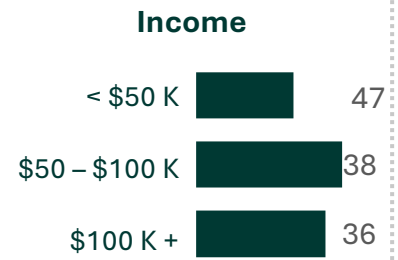
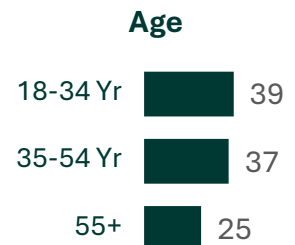
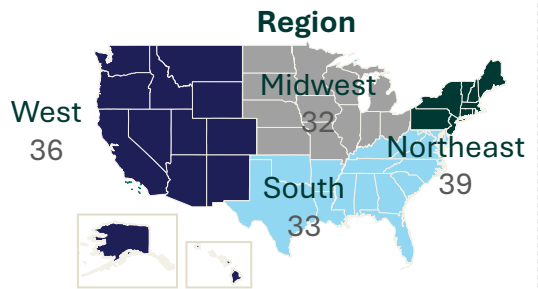
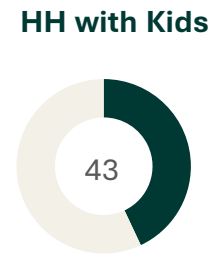
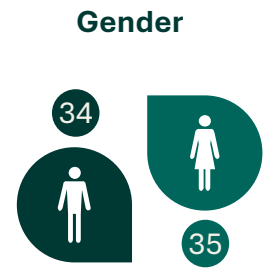
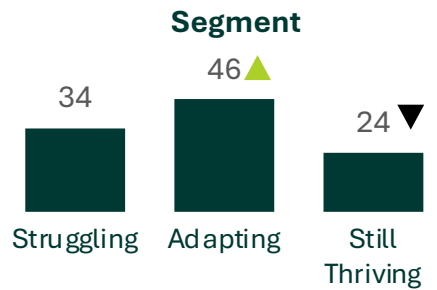


# Meal Replacements - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

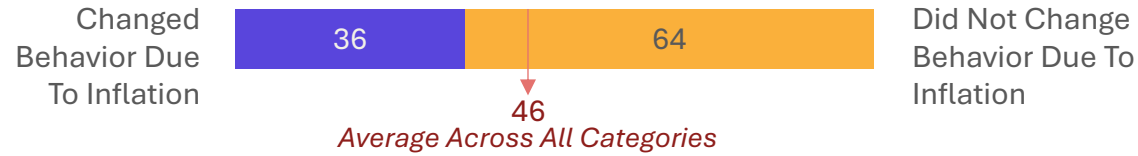


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

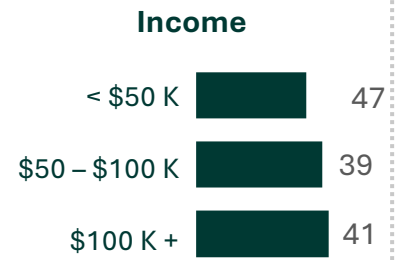
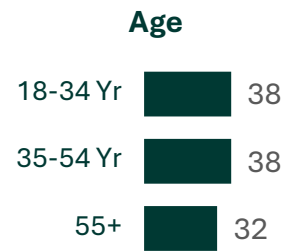
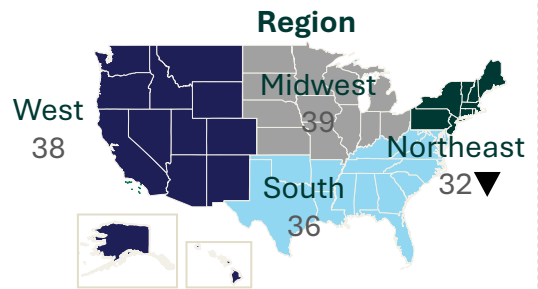
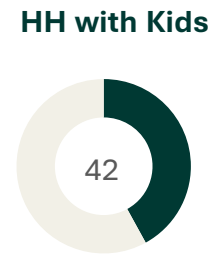
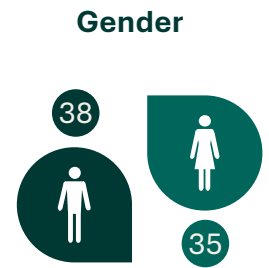
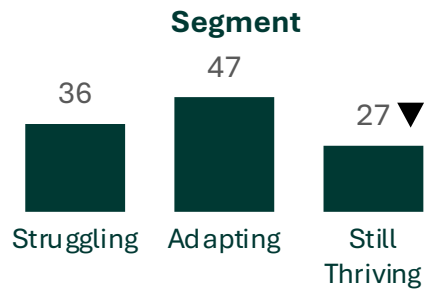


# Sparkling Soft Drinks - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

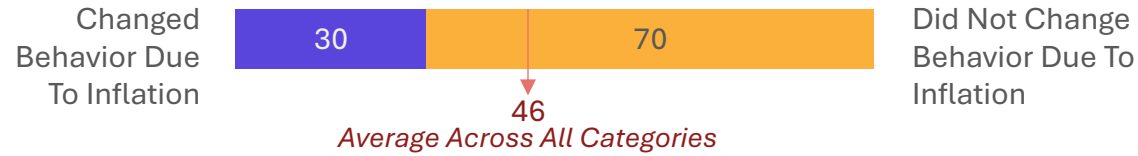


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

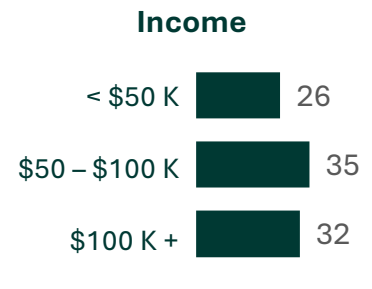
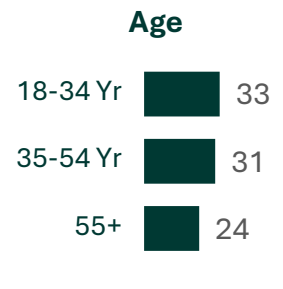
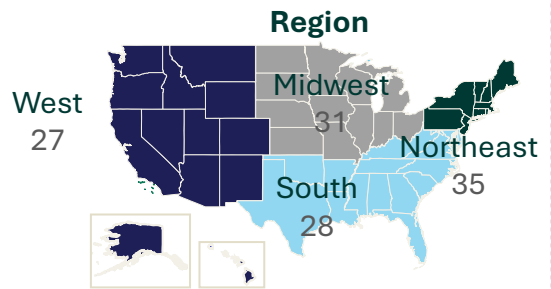
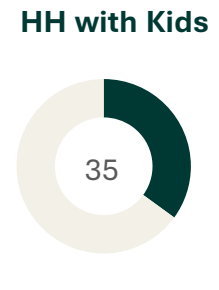
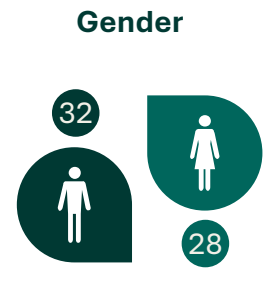
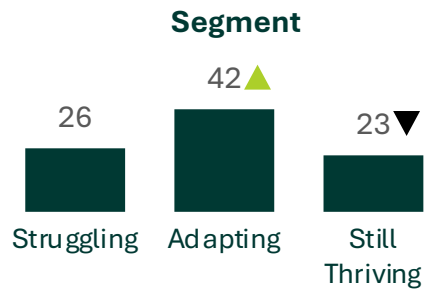


# Unflavored Sparkling Water - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

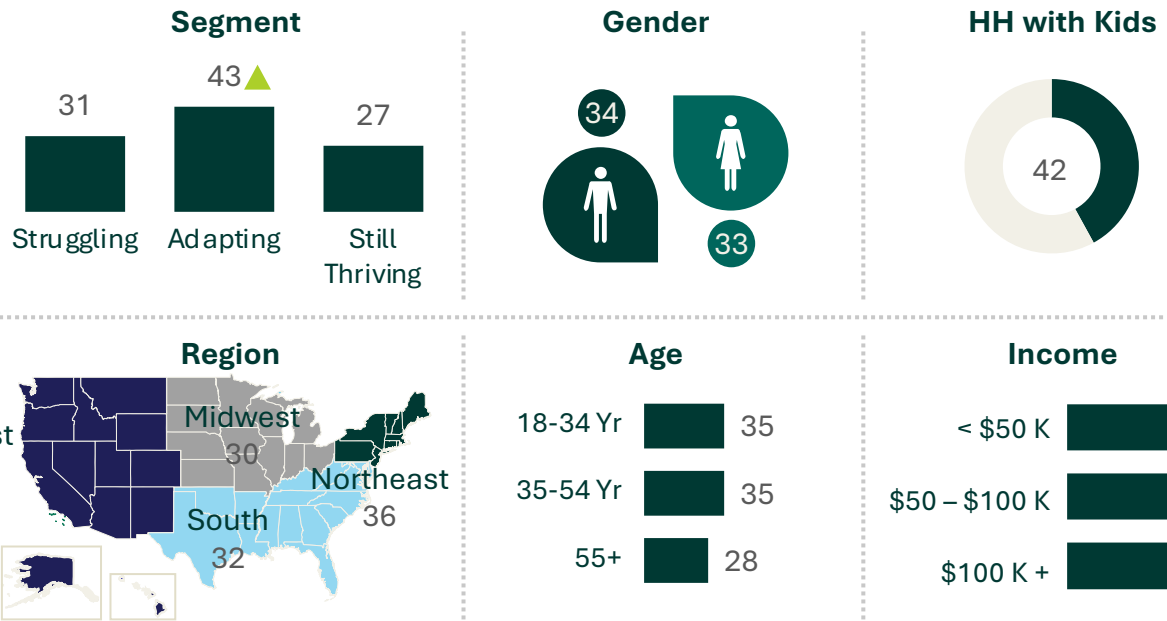
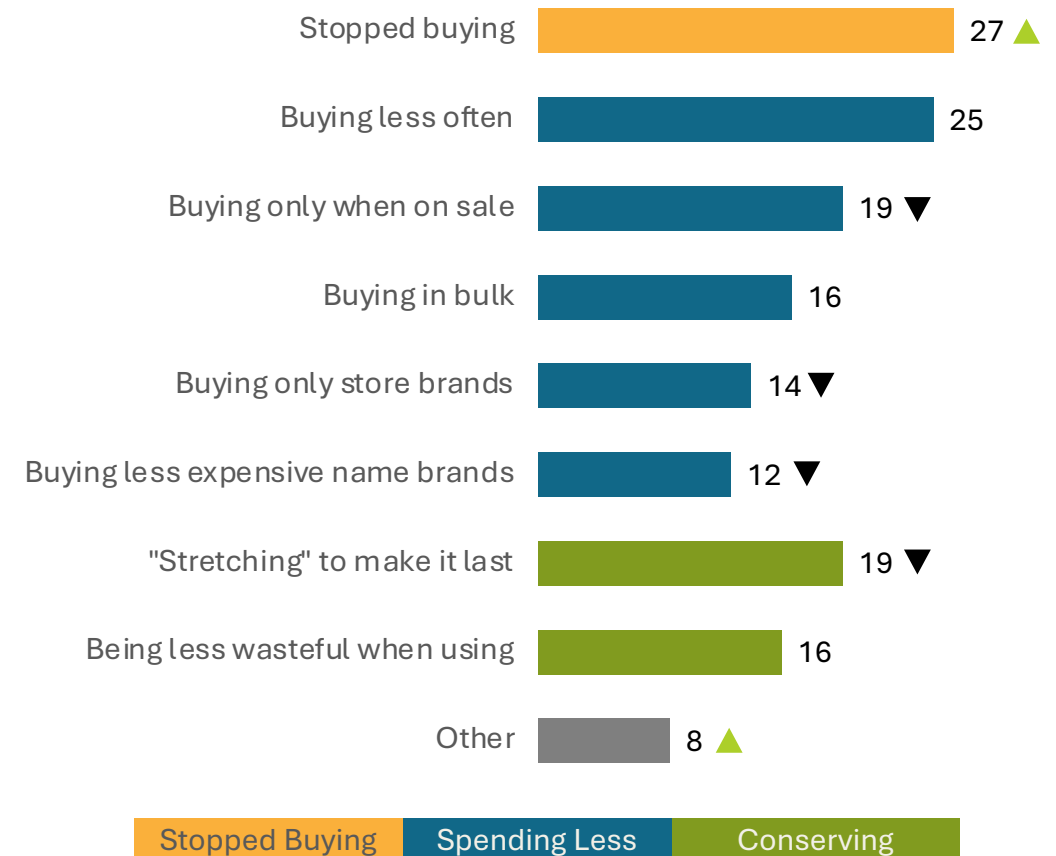


# Flavored Sparkling Water - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

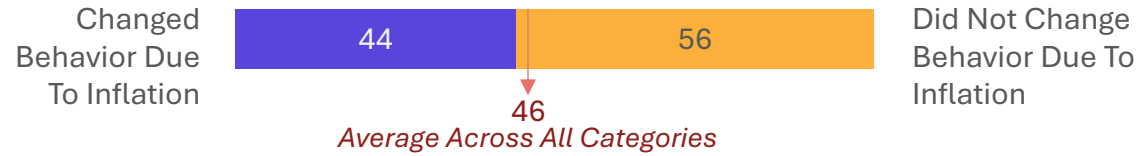


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

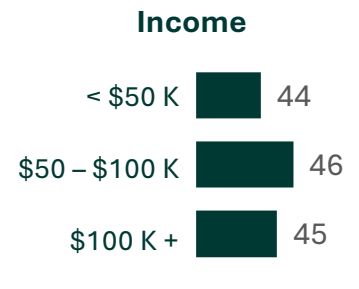
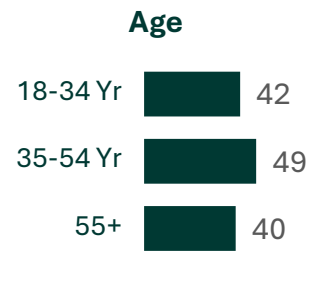
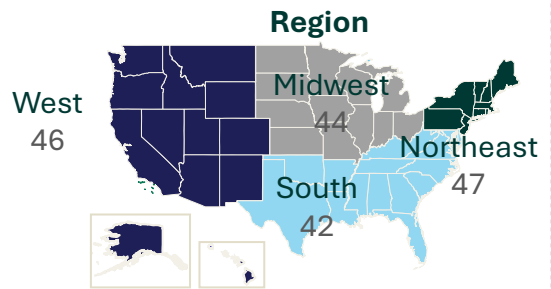
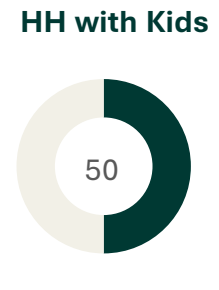
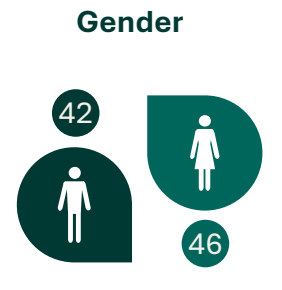
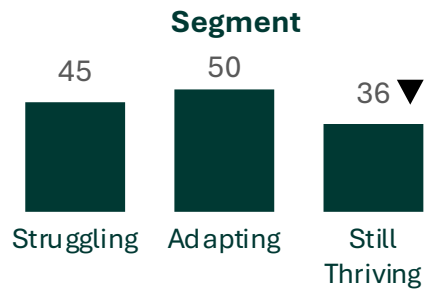


# Fruit Juice - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

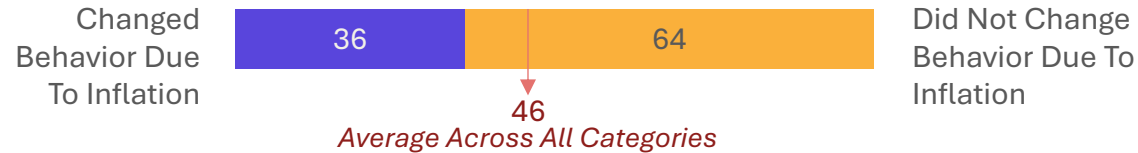


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

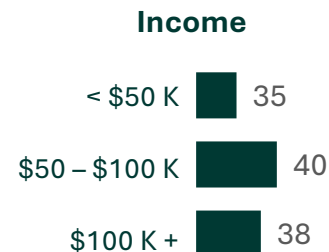
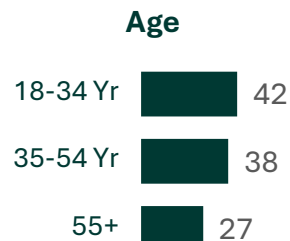
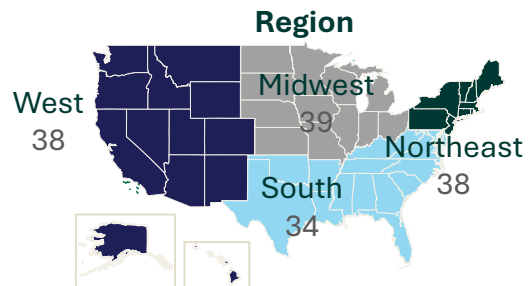
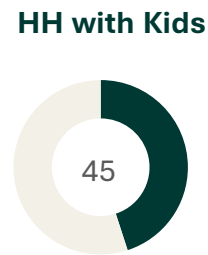
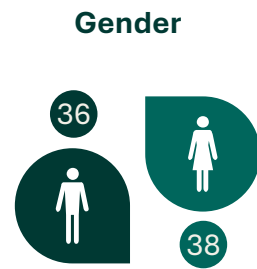
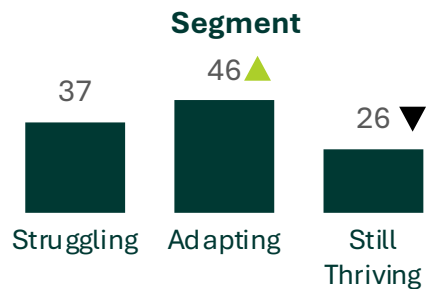


# Energy Drinks - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



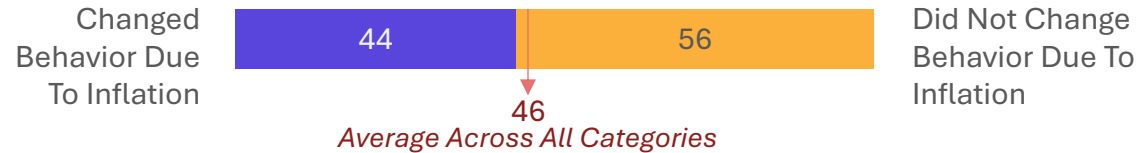
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



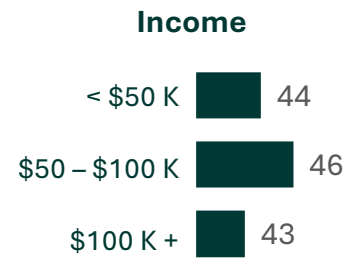
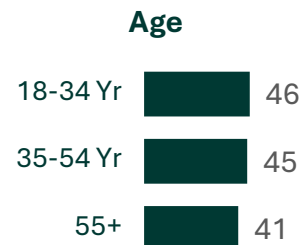
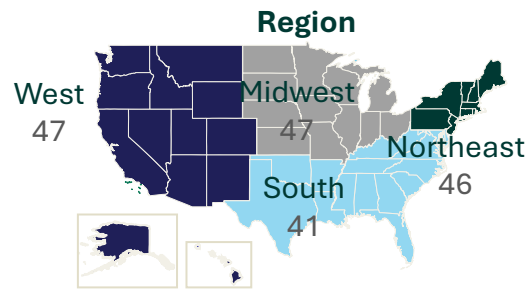
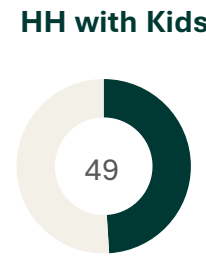
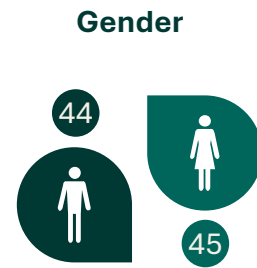
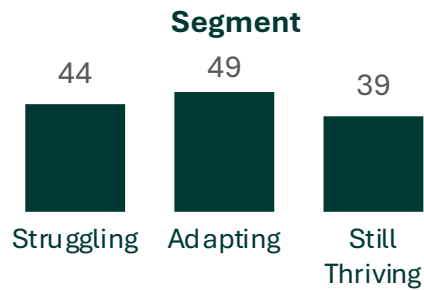


# Chocolate Bars, Tablets & Pieces - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

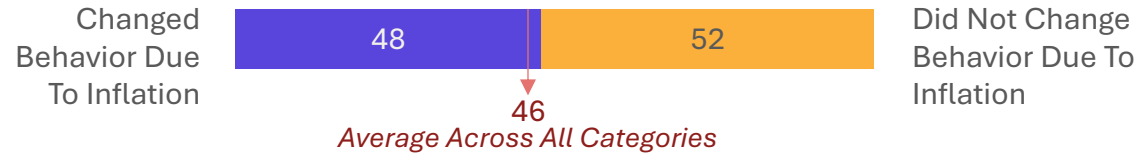


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

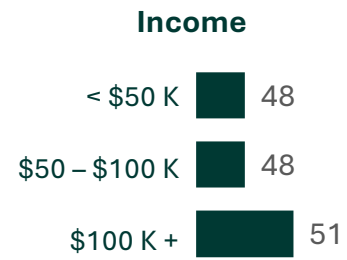
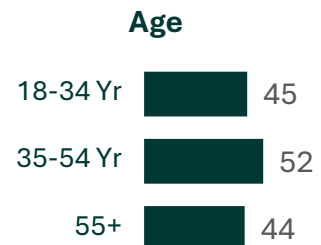
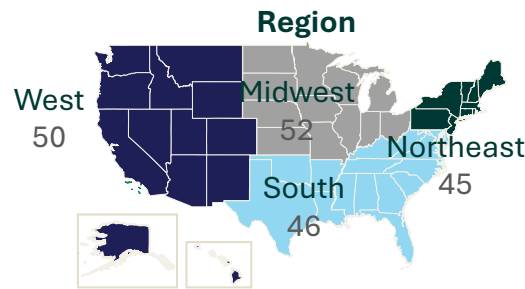
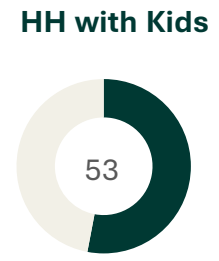
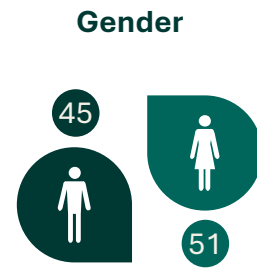
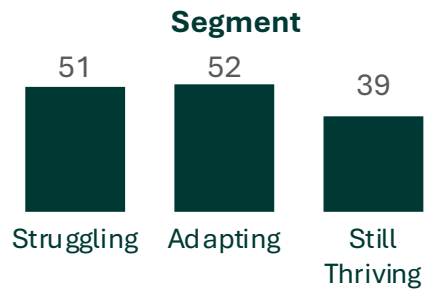


# Chips - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

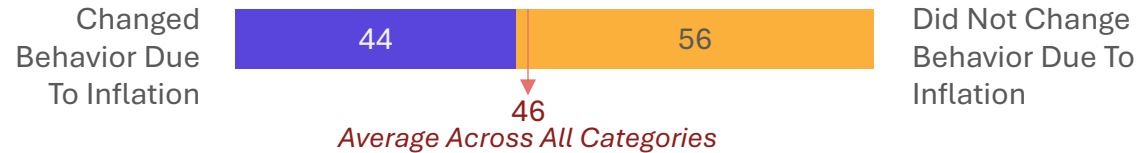


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

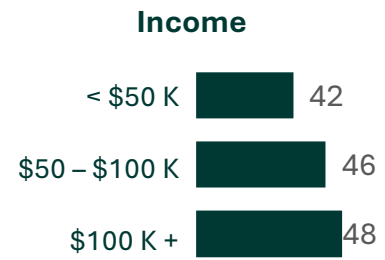
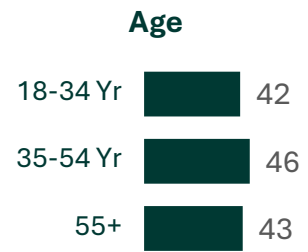
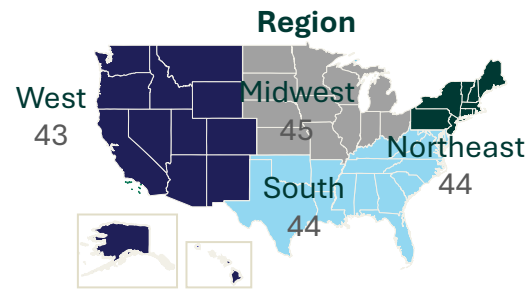
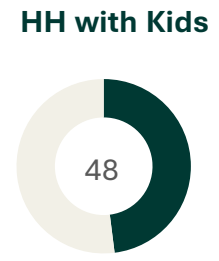
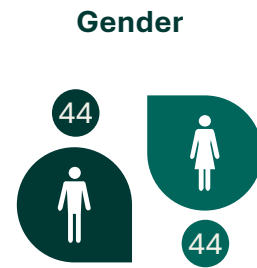
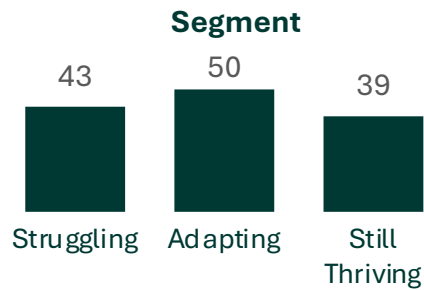


# Cookies - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



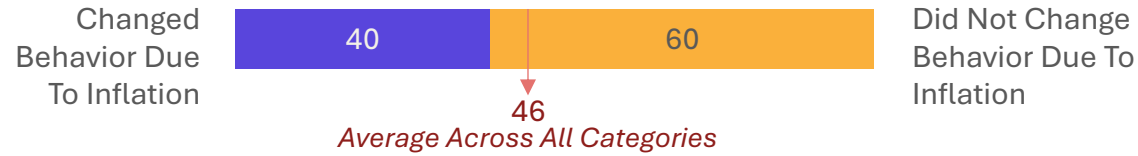
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

Q17. If you have changed how or what you buy or spend on it due to inflation, swipe right or click the ✓. If you have not changed how or what you buy or spend on it due to inflation, swipe left or click the 'X'. Base: Total American Respondents (n=1531); Q4 (Region), Q2 (Gender), Q23 (HH with Kids), Q3 (Age), Q27 (Income), Base: Americans who have changed their buying behavior due to inflation (n=532). Q20. What are you doing in response to inflation on this product, specifically? Select all that apply. Base: Americans who have changed their buying behavior due to inflation & were assigned to this category (n=157).

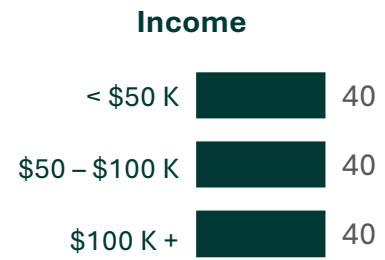
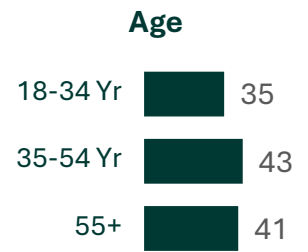
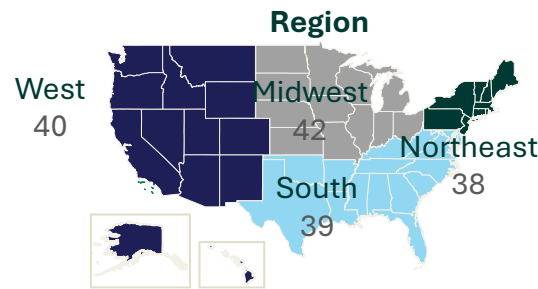
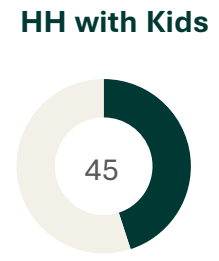
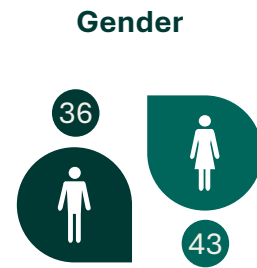
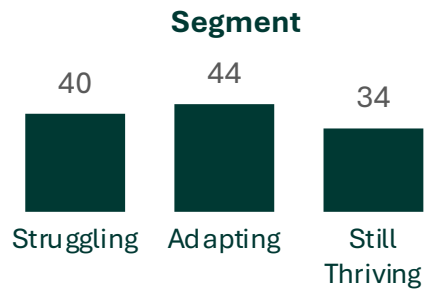


# Crackers - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

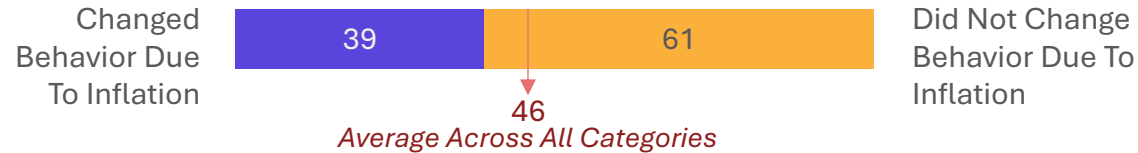


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

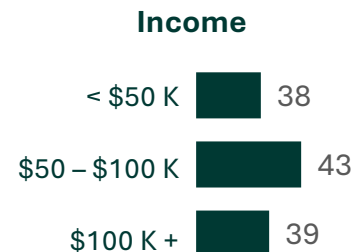
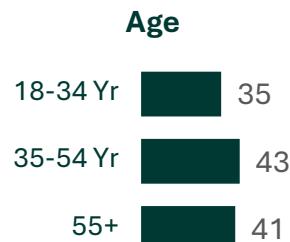
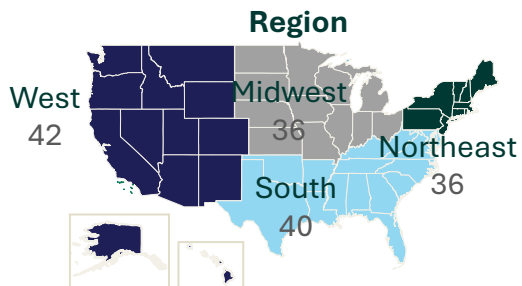
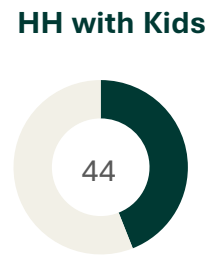
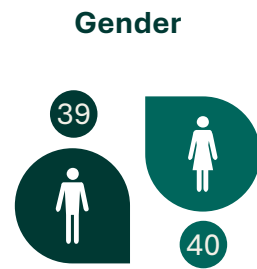
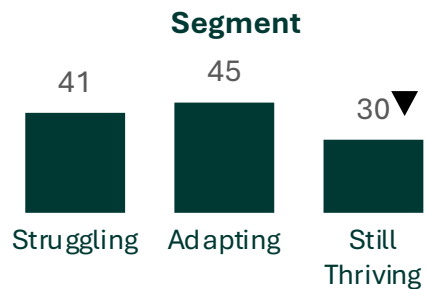


# Soups, Stews & Chilis - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

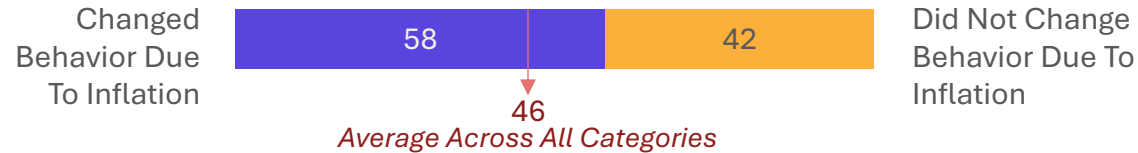


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

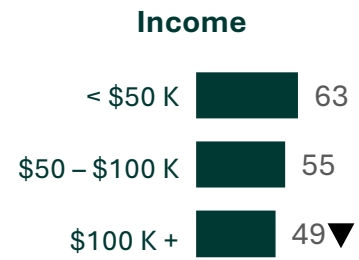
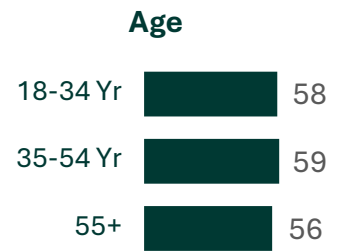
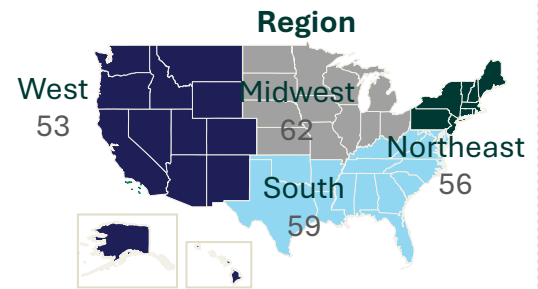
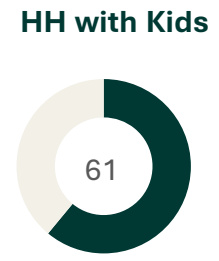
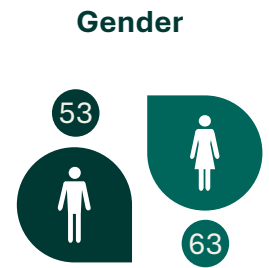
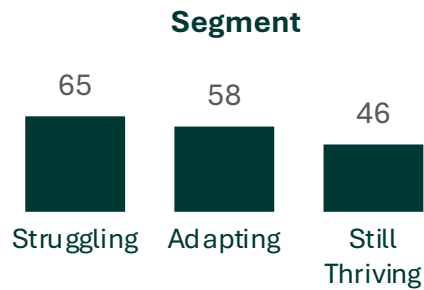


# Toilet Paper - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



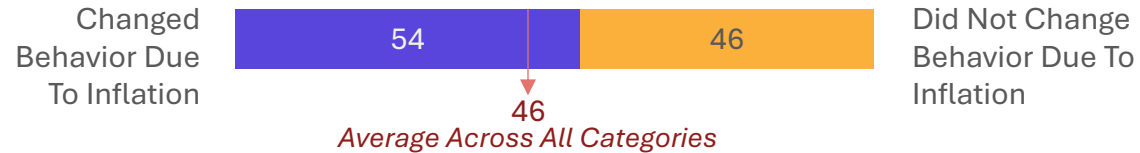
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

Q17. If you have changed how or what you buy or spend on it due to inflation, swipe right or click the ✓. If you have not changed how or what you buy or spend on it due to inflation, swipe left or click the 'X'. Base: Total American Respondents (n=1531); Q4 (Region), Q2 (Gender), Q23 (HH with Kids), Q3 (Age), Q27 (Income), Base: Americans who have changed their buying behavior due to inflation (n=702). Q20. What are you doing in response to inflation on this product, specifically? Select all that apply. Base: Americans who have changed their buying behavior due to inflation & were assigned to this category (n=160).

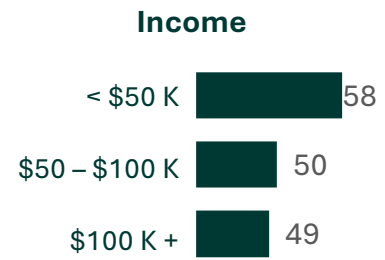
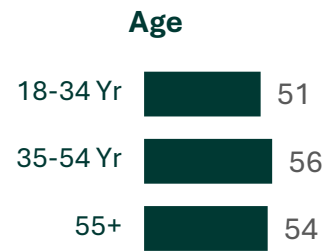
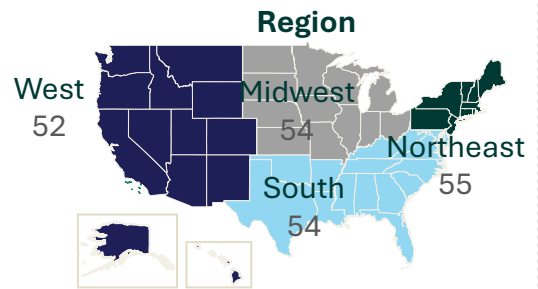
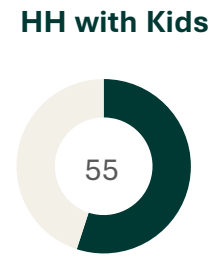
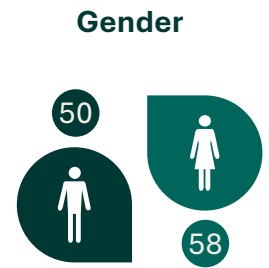
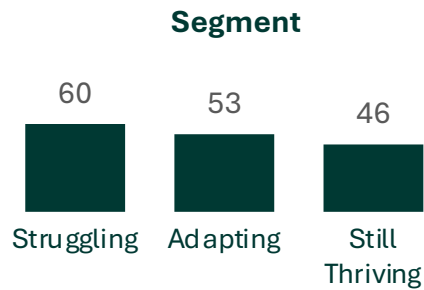
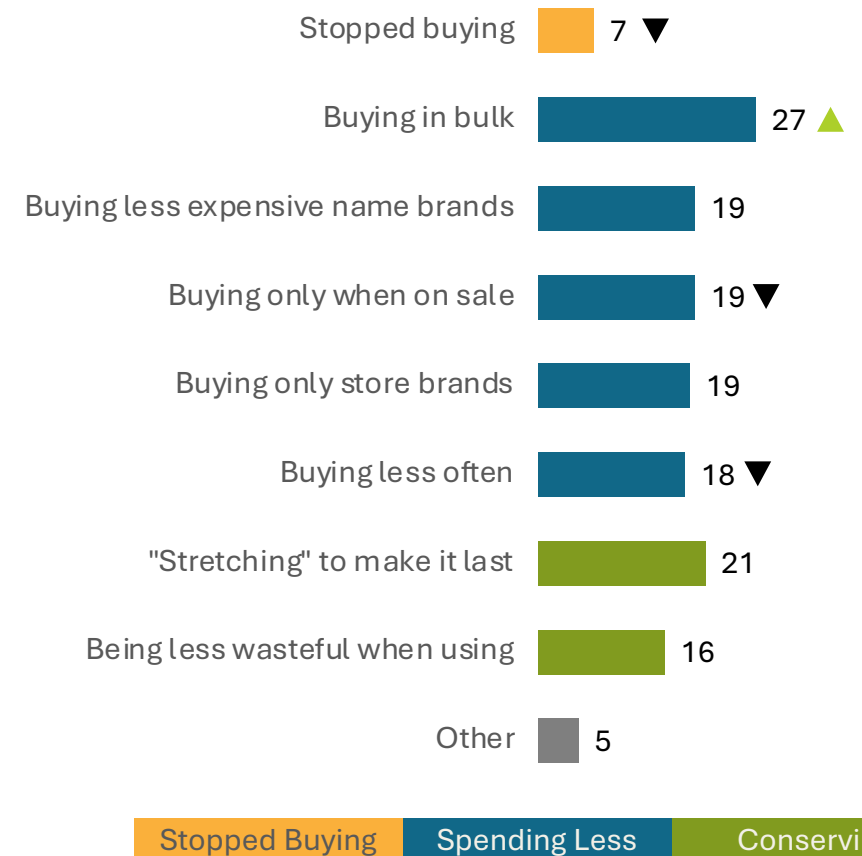


# Paper Towel - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



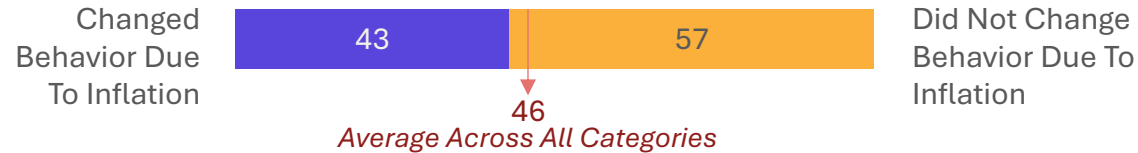
▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



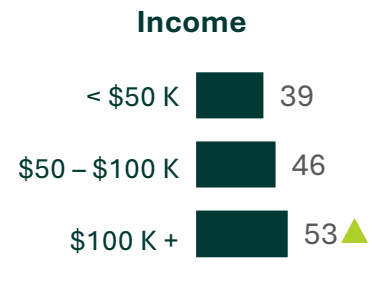
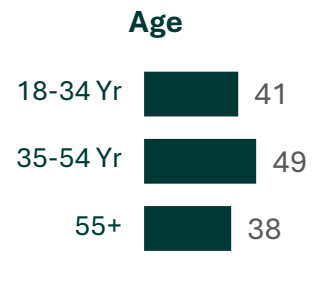
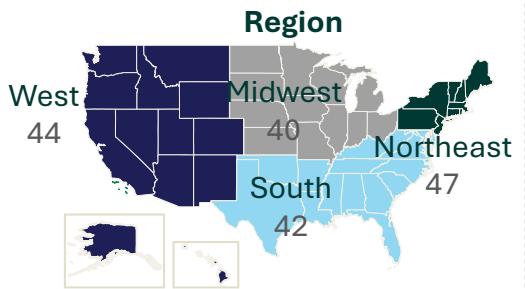
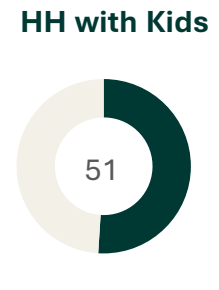
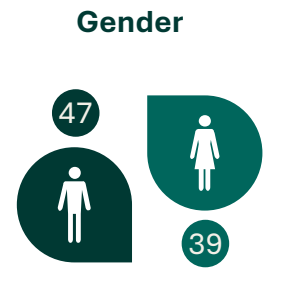
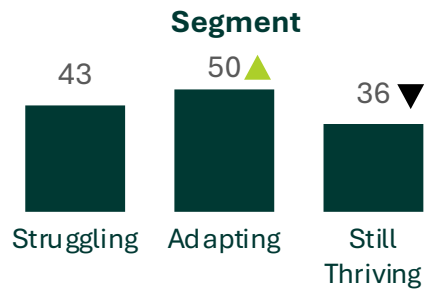


# Wine & Beer - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

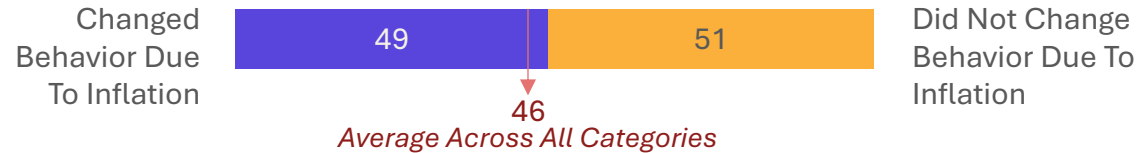


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

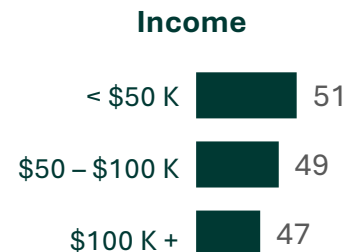
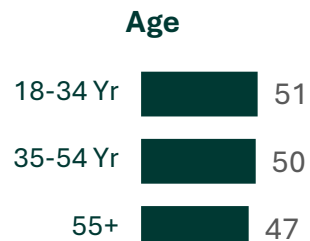
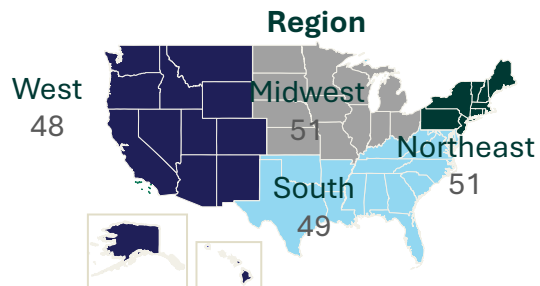
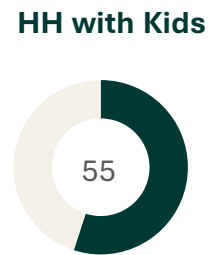
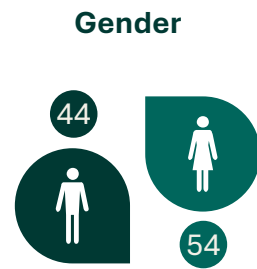
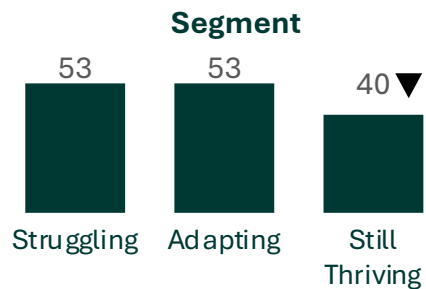


# Over-the-counter Medications - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

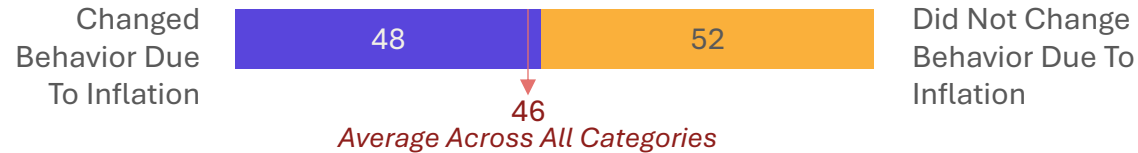


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

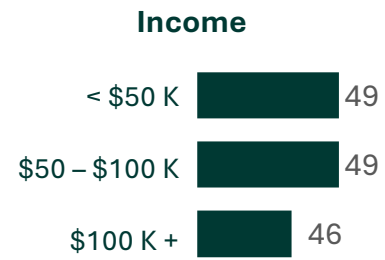
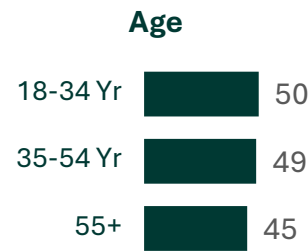
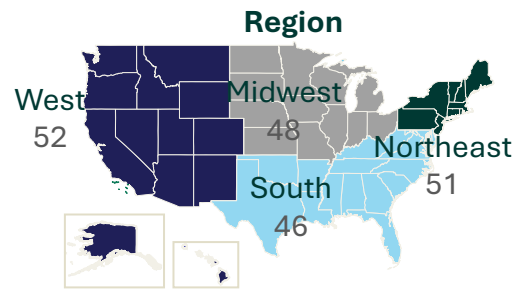
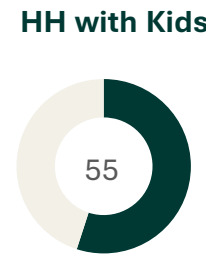
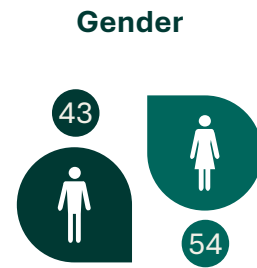
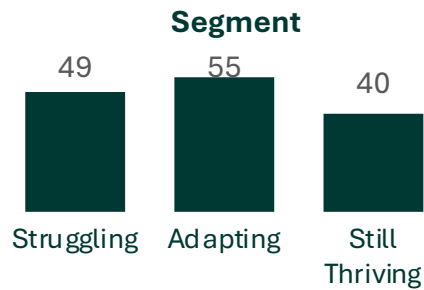


# Haircare Products - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

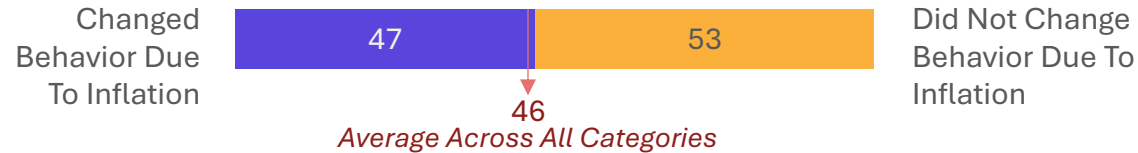


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

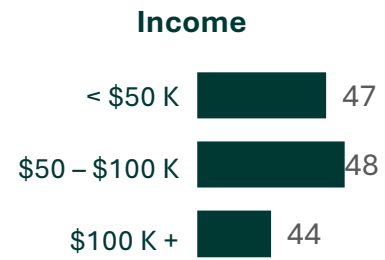
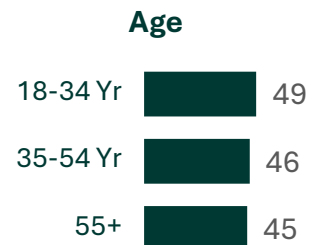
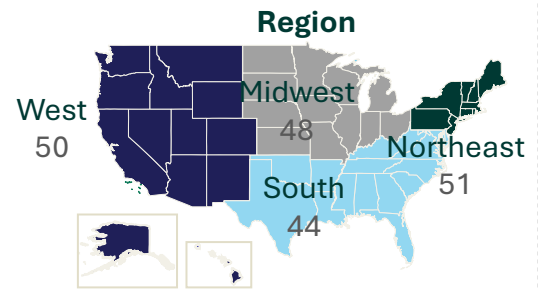
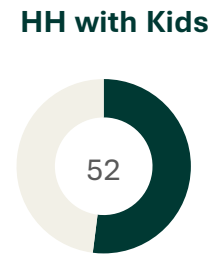
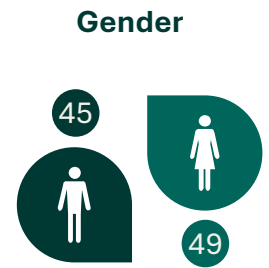
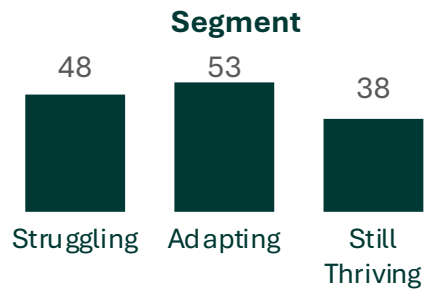
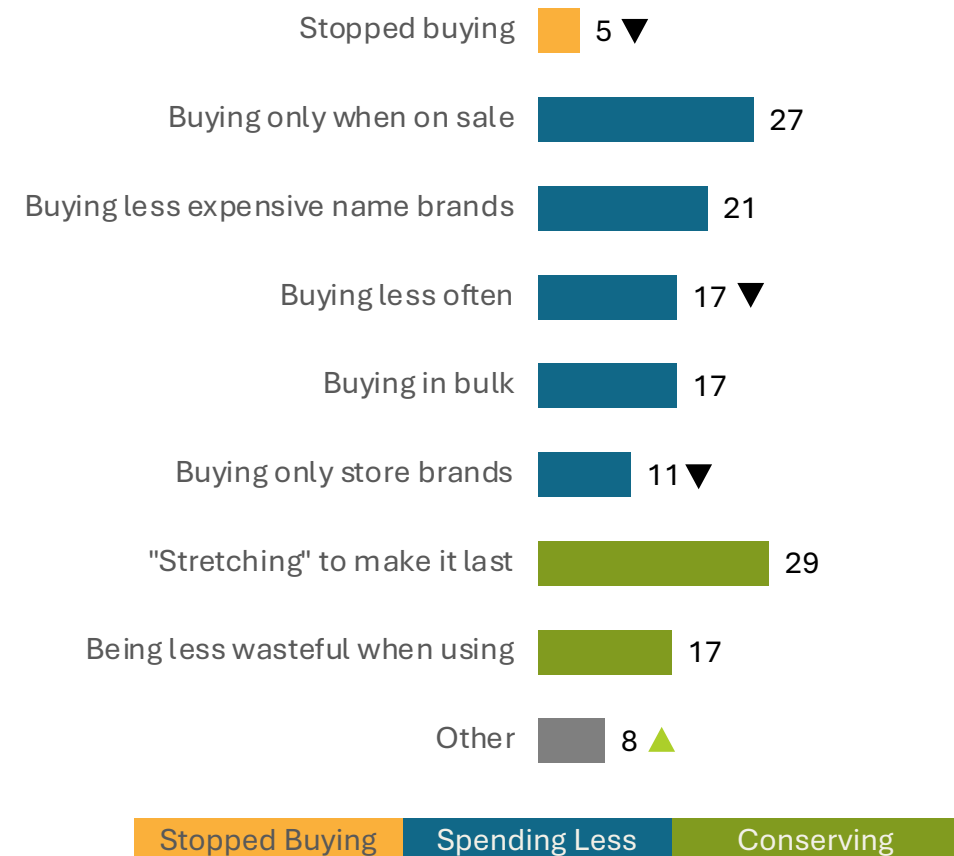


# Toothpaste/ Oral Care - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

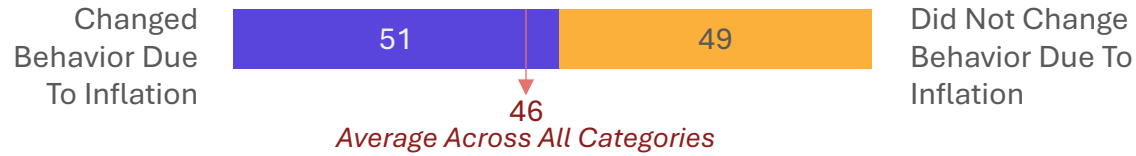


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

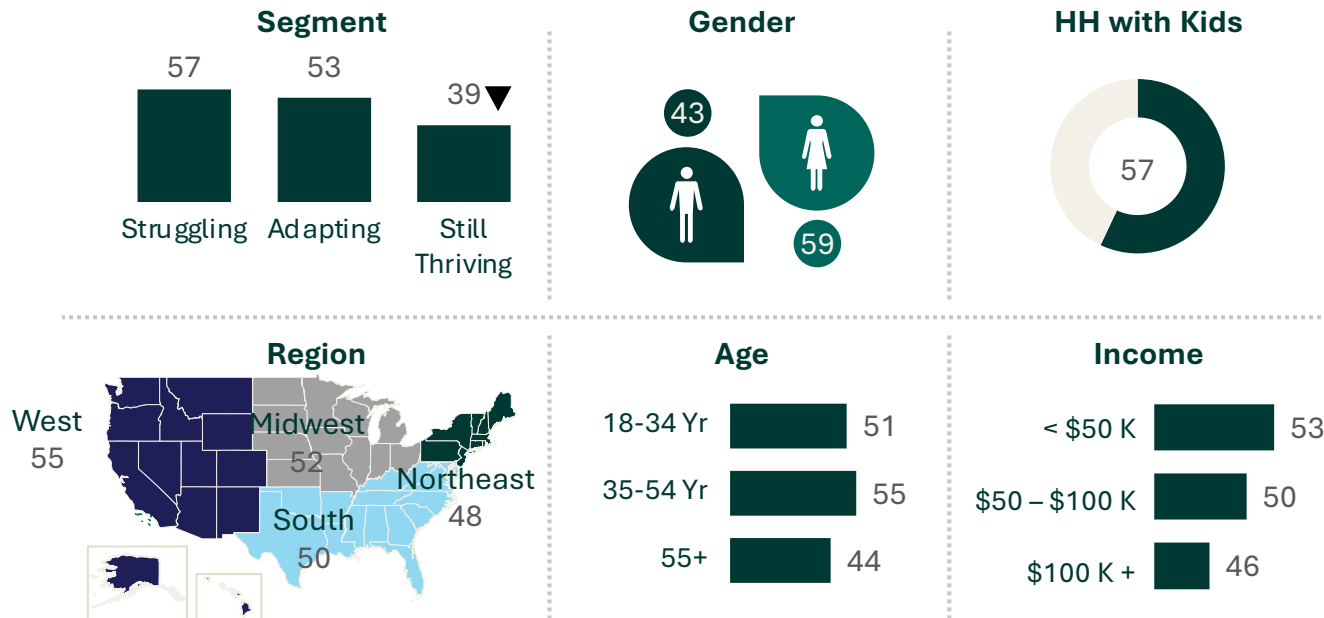


# Bath & Body Care - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)

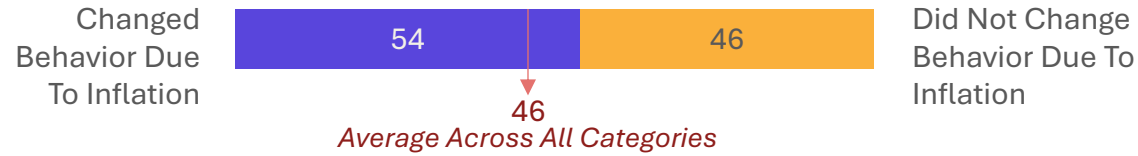


▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories

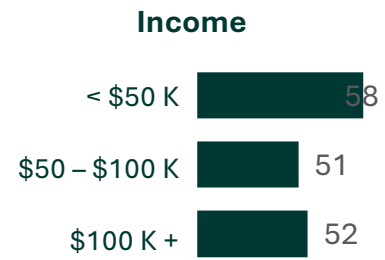
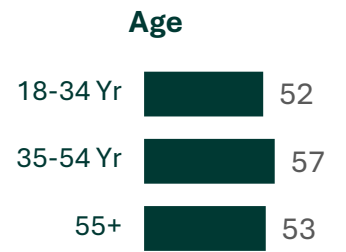
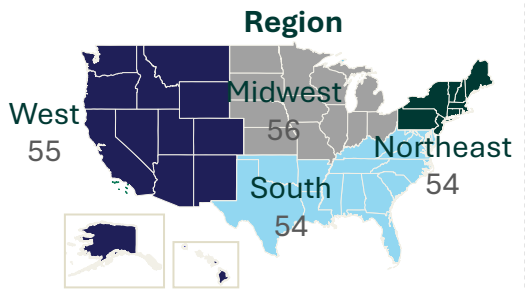
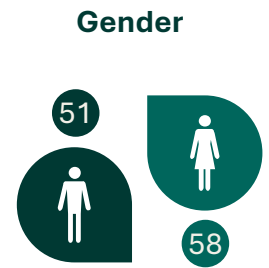
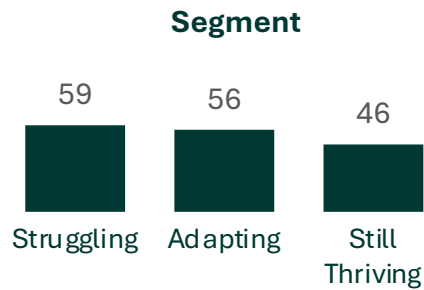


# Cleaning Supplies - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



Q17. If you have changed how or what you buy or spend on it due to inflation, swipe right or click the ✓. If you have not changed how or what you buy or spend on it due to inflation, swipe left or click the 'X'. Base: Total American Respondents (n=1531); Q4 (Region), Q2 (Gender), Q23 (HH with Kids), Q3 (Age), Q27 (Income), Base: Americans who have changed their buying behavior due to inflation (n=660). Q20. What are you doing in response to inflation on this product, specifically? Select all that apply. Base: Americans who have changed their buying behavior due to inflation & were assigned to this category (n=159).

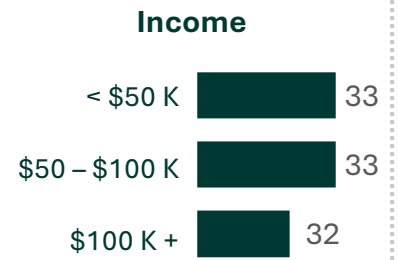
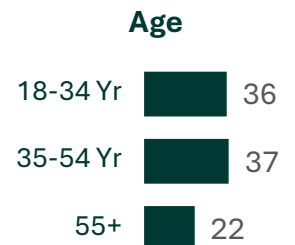
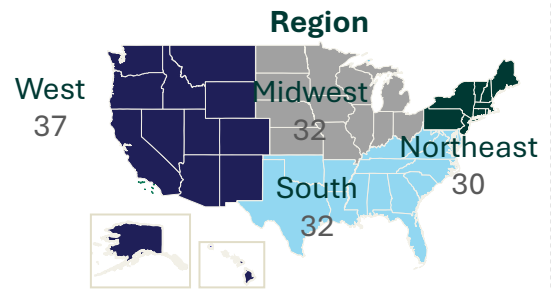
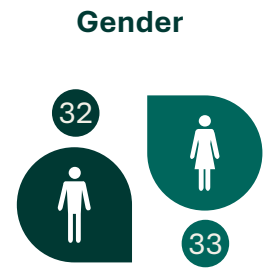
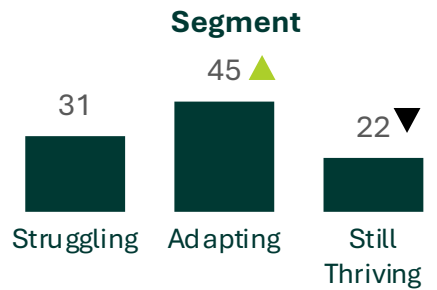


# Cannabis - Response to Inflation

## Impact on Behavior Due To Inflation (% Selected)



## Change In Behavior Due To Inflation\*\* (% Selected)



▲ ▼ \*Indicates what's over/under indexing vs total sample/ \*\*Average across all categories



# Implications for Brands

Coming Soon

# Project Partners



Dynata is the world's largest first-party data platform for insights, activation, and measurement. With a reach that encompasses over 67 million consumers and business professionals globally, and an extensive library of individual profile attributes collected through surveys, Dynata is the cornerstone for precise, trustworthy quality data. The company has built innovative data services and solutions around its robust first-party data offering to bring the voice of the customer to the entire marketing continuum – from insights to activation, measurement, and optimization. Dynata serves more than 6,000 market research, media and advertising agencies, publishers, consulting and investment firms and corporate customers in North America, South America, Europe, and Asia-Pacific. Learn more at [www.dynata.com](http://www.dynata.com).



Canvs AI is an insights platform that transforms open-ended text from surveys, social media, transcripts, product reviews, and more into conversational intelligence about how people feel and why. Learn more at [canvs.ai](http://canvs.ai)



Drop is the most effective end-to-end platform that enables brands and merchants to influence and understand Millennial and Gen Z behavior. We are also the largest mobile rewards network powered by over \$40 billion of payment volume that are ethically-sourced credit and debit card transaction dataset.

We've driven over \$400 million in sales to North America's largest brands and merchants, and our Members have provided valuable insights by answering over 100 million survey questions. Learn more at [www.joindrop.com](http://www.joindrop.com).



Dig Insights and Upside thank our partners for their support in tapping into the hearts and minds of consumers in this project.



**Thanks!**

