



pepviz™ pulse no.1

the pandemic's effect on store mission and cart sizes



people are heading to stores
with **new goals** as we
come out of the pandemic



the lockdown made stock-up trips more important than ever

and stock-ups will remain relevant even as people begin to socialize again



54%

54% of people say they'll permanently spend more time at home*

[behavior indicator]



30%

in 2020, stock-ups made up 30% of food & beverage trips*



17%

stock-up trips rose 17% in 2020 vs. 2019* – 7.4x the growth rate of total food \$ beverage trips



4 pt.

the year saw 4 point growth in mix vs. all other trip missions

● Euromonitor, Dec 2020
● Total US – all outlets
● Vs. food & bev +7%

IRI shopper mission panel for PEP, total US – all outlets, latest 52 weeks ending 12-27-20 vs. latest 52 weeks ending 12-29-19; Euromonitor, Dec 2020

stock-up cart sizes are large

This presents an opportunity to drive impulse purchase through product variety and cross-category displays.



stock-up trips' dollar ring are 1.5x the average food & beverage basket"

1.5x

66%

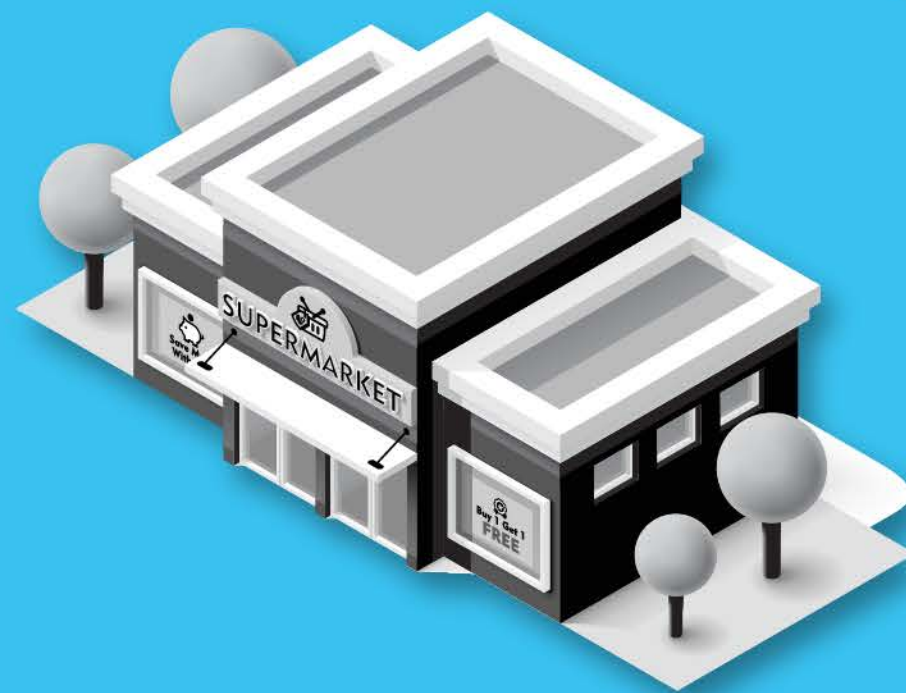
of stock-up trips included unplanned purchases in 2019

DISCOUNT
GROCERY

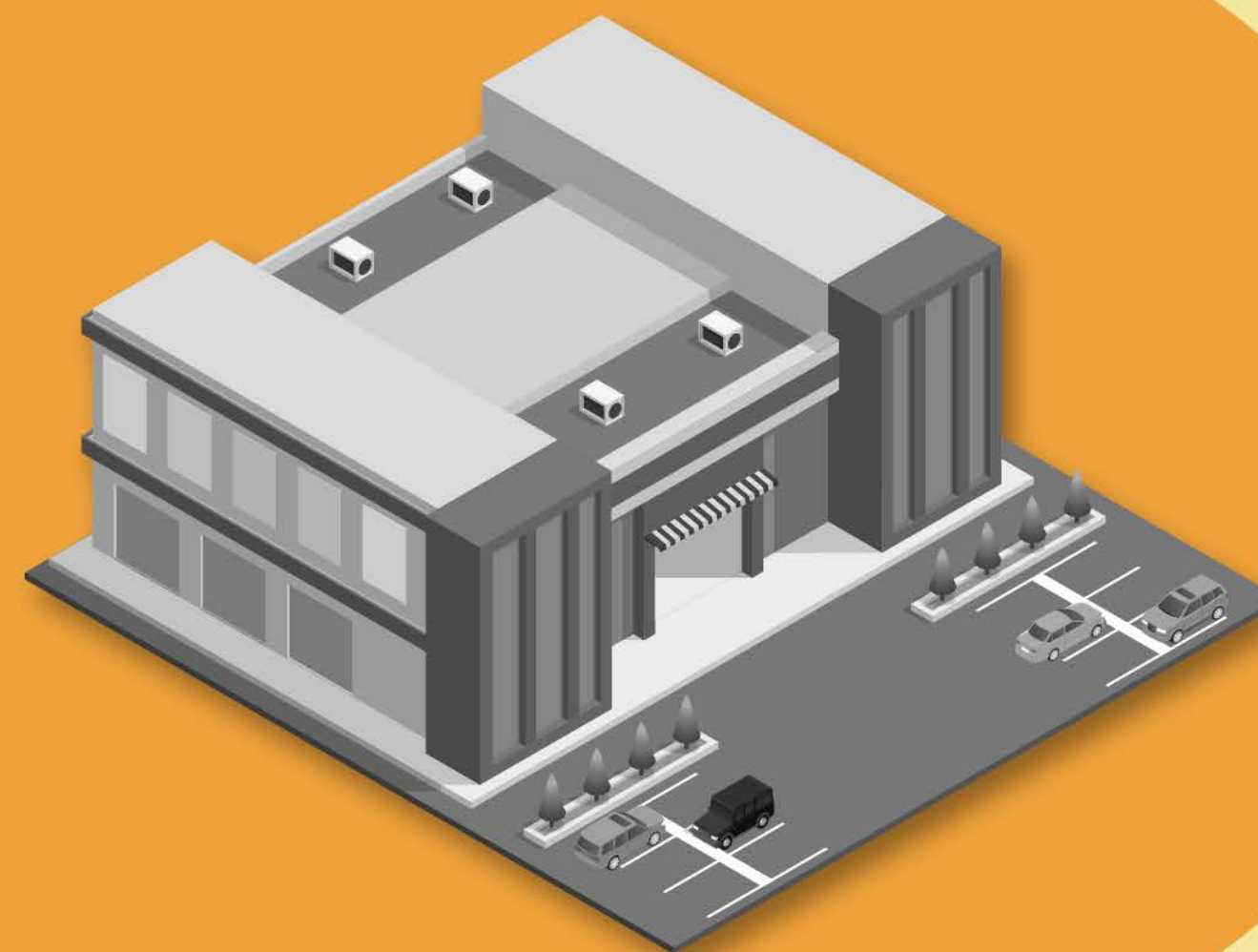
1.2x



MASS
1.3x



CLUB
1.7x



**stock-up
shoppers
have choices
of where to go**

Stock-up trips overindex
in large-format channels
vs. all channels.

frictionless omnichannel creates **new tablestakes** in fulfillment


STANDARD
DRIVERS 2019


EMERGING
DRIVERS 2021+



MOBILE APP ENHANCES
IN-STORE EXPERIENCE

SIMILAR PRICES IN-
STORE AND ONLINE

GOOD PLACE TO
TAKE A BREAK

BETTER BEVERAGES

HELPFUL RECOS BASED
ON PAST PURCHASES



TRACK YOUR ORDER
PROGRESS IN-APP

NO-CONTACT PICKUP
AND DELIVERY

FREE SHIPPING
FOR MEMBERS

EASILY REVISE ORDERS
AFTER PLACING THEM

for stock-up trips, product variety and selection are the most important differentiators



Typical differentiators
do not equal
stock-up differentiators.



TOTAL TRIPS

FLAVORS I CAN'T FIND IN OTHER PLACES

BETTER CHILLED FOOD OR BEVERAGES

BETTER CAFE

BUY ONLINE AND PICK UP IN-STORE

STOCK-UP

BEST SELECTION OF PRODUCTS

PLACE TO FIND PERFECT PACK SIZE

FREE ONLINE SHIPPING OFFER

BETTER FROZEN AISLE





change the way you data

pepviz™ is a first-of-its-kind data practice that helps you unlock new ways to grow in food & beverage using actionable insights and dynamic data:

- drive trips & loyalty in the new normal
- boost omnichannel shopping
- monitor changes in shopper behavior
- discover new differentiators and emerging preferences

Discover how we can help you uncover new ways to grow at pepviz.com.

