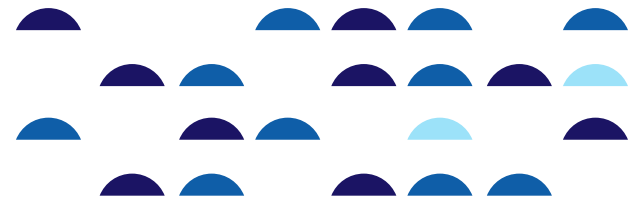




pepviz™ pulse no. 2

navigating a changing c-store landscape



before COVID, people were pressed for time,
making store location their #1 deciding factor



54%

didn't have enough time to do
all the things they needed to



64%

say having access to
products and services **when and
where I need them** is important

the pandemic has changed shopper attitudes & behavior

while shopper behaviors vary across
the country, in general we've found:

- people are staying home more often
- shoppers are making more planned, purposeful outings
- health & safety are top of mind
- shoppers are embracing digital options for food & beverage

YTD workplace
mobility is a
79 index
v pre-COVID

41% are now
shopping both
online & in-store
each week

the pandemic changed how people view convenience stores

trips to C&G were for different purposes than we had historically seen



non-work day trips **+3pts**



1 in 5 shoppers

bought multi-pack or multi-serve in their last visit

(increased purchase of multipack and multi-serve products, and most product categories have increased multi package selection)

digital became more mainstream, even in C&G



+13% c-store online sales mix, with shoppers using both retailer websites/apps and 3rd party apps equally

shopper behavior will continue to evolve as we move towards a “new normal”



comfort has become a core need even as life gets back to ‘normal’

33% are buying salty snacks for comfort
(+10% more vs. pre-COVID)

31% are prioritizing taste and treating
themselves

shoppers are looking for easy choices in retailers and products, alike

89% agree that shopping convenience
stores allows them to be more flexible
(+3pts since pre-COVID)

77% choose familiar brands they trust
(+6pts since pre-COVID)

59% Say brand names or labels are important
to them (+14pts since pre-COVID)

and new shopper behaviors will create new opportunities for c-stores

new trip missions

shifting dayparts

evolving shopper needs



+4 pts planned trips

will vary by location – urban markets saw greater decreases in workplace mobility than rural areas

know your shopper and ensure your store **reflects their needs**



+4 pts afternoon through late night trips

understand when your shoppers are visiting and ensure your assortment **fits into their day**



+35% spend per trip v 2019

recognize the **role your store plays for your shoppers** and look to new options to meet their evolving needs



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:

- inspire impulse
- drive trips & loyalty in the new normal
- monitor changes in shopper behavior
- discover new differentiators & emerging preferences

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

