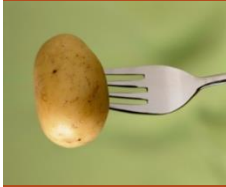


Food Enthusiasts Shopping Patterns at Retail



OBJECTIVES

- Create a deeper understanding of the new Food Enthusiast shopper group to understand what to execute with the consumer at retail, further the engagement of retailers and provide the right recommendations in order to increase potato sales



METHODOLOGY

- Isolated and analyzed buyer behavior of the Food Enthusiast shopper group through Nielsen's Consumer Homescan Panel and Shopper Loyalty Card Platform
- Increase knowledge of Food Enthusiasts and how they compared to the average household by examining:
 - Basic shopper/consumer metrics across the store and how those have changed since the prior year
 - Annual spend and purchase frequency of fresh potatoes and potato alternatives across the store
 - Where they are shopping across channels and specific retailers
 - What they are frequently purchasing across the store, with or without potatoes in the basket



The Food Enthusiast:

- Likes to try *new foods*
- *Experiments* and tries *new recipes*
- *Cooks frequently* throughout the week
- *Prefers fresh* vs. frozen
- Loves to *eat out*
- Describes *cooking as "adventurous"*



SUMMARY OF KEY FINDINGS

- Food Enthusiasts are generally more affluent, smaller households with a general interest in health and higher spend on fresh food compared to the average shopper
- They purchase the majority of their perishable products in traditional grocery channels with a preference for more premium stores such as Whole Foods or Trader Joes

Over-Index with Food Enthusiast		Under-Index with Food Enthusiast	
Save Mart Lucky	141	Ingles	79
Ralph's	136	IGA	84
Giant Landover	132	Food Lion	89
Whole Foods	130	Save A Lot	89
Trader Joe's	128	Walmart	90

■ Index to Average >120

■ Index to Average <80

Chains known for strong perishables programs index highly with Food Enthusiasts, while chains with a perceived lower quality under-index



- The majority of Food Enthusiast households purchase fresh potatoes, but spend a smaller share of their produce dollars on potatoes compared to the average shopper
 - Overall, Food Enthusiasts spend more than the average shopper on produce across the store
- Food Enthusiasts are not substituting fresh potatoes for other starches/sides as they spend less annually across the store on these products compared to the average shopper

Food Enthusiasts Shopping Patterns at Retail



SUMMARY OF KEY FINDINGS, CONTINUED

- Although nearly 60% of all Food Enthusiast trips contain only 1-5 items, they primarily purchase potatoes on stock up trips, similar to the average shopper
- Food Enthusiasts make more smaller trips where they purchase items that are likely used soon after purchase, like fresh seafood and value-added produce, though potatoes are usually purchased on large stock-up trips

	Stock-Up Trips (15+ items in the basket)		Fill-In Trips (6-15 items in the basket)		Quick Trips (<6 items in the basket)	
	Food Enthusiasts	Average Shopper	Food Enthusiasts	Average Shopper	Food Enthusiasts	Average Shopper
Total Trips 	15.5%	18.2%	24.8%	25.5%	59.8%	56.3%
Potato Trips 	60.3%	63.2%	30.0%	27.9%	9.7%	8.9%

Food Enthusiasts purchase more than the average shopper on quick-trips

- When Food Enthusiasts buy potatoes they frequently purchase other healthy, fresh products or convenient options from the produce, deli and seafood departments



Food Enthusiasts over-index on penetration in these categories:

Fresh Scallops	159
Sprouts	133
Bulk Coffee	131
Deli Condiments	130
Deli Desserts	130
Shelf-Stable Meal Starters	128
Deli Sushi	126
Deli Soup	126
Fresh Shrimp	125
Deli Coffee by the Cup	124
Fresh Crab	124
Self-Served Deli Cheese	123

Index to Average >120



Percentage Food Enthusiast potato trips that include:

Refrigerated Meal Starters*	332
Deli Breakfast*	263
Refrigerated Sandwich Spreads*	198
Frozen Un-breaded Seafood*	186
Bakery Cookies	151
Fin Fish	141
Deli Snacks	137
Fresh Scallops*	136
Deli Sushi*	135
Refrigerated Salad Dressing	134

IMPLICATIONS AND RECOMMENDED ACTIONS

Recommendations	<ul style="list-style-type: none"> ➤ Offer smaller packages, wide bulk assortment and exciting recipes meant for 1-2 people ➤ Focus program efforts towards chains that over-index with Food Enthusiasts ➤ Identify ways to promote the ease of use of potatoes in their daily meal prep and some quick preparation techniques 	<ul style="list-style-type: none"> ➤ Partner with items frequently in the basket on smaller trips to drive purchase frequency by suggesting adding potatoes to an adventurous seafood meal ➤ Use packaging, in-store signage or social media to communicate health benefits to Food Enthusiasts
Next Steps	<ul style="list-style-type: none"> ➤ Encourage retailers to incorporate these initiatives into their marketing strategies ➤ Contact Sarah Reece (sarah@uspotatoes.com) if you need materials to assist with the discussion and implementation of these initiatives ➤ Link to full research: uspotatoes.com/market-research 	

