

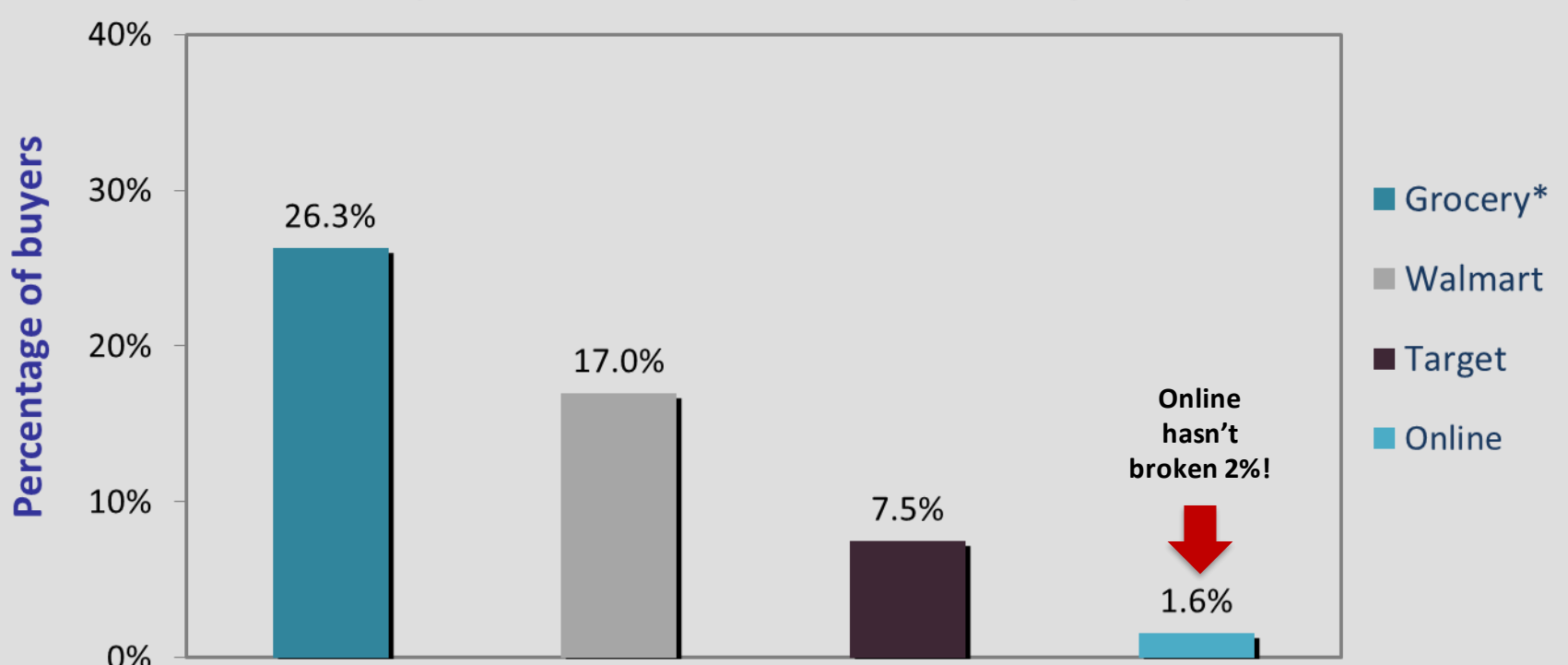
Some Things Are Old Because They Still Work



Grocery, Deals Matter in Food & Beverages

Grocery remains the dominant channel for food and beverage consumables.

Share of Mentions Where Purchased Regularly

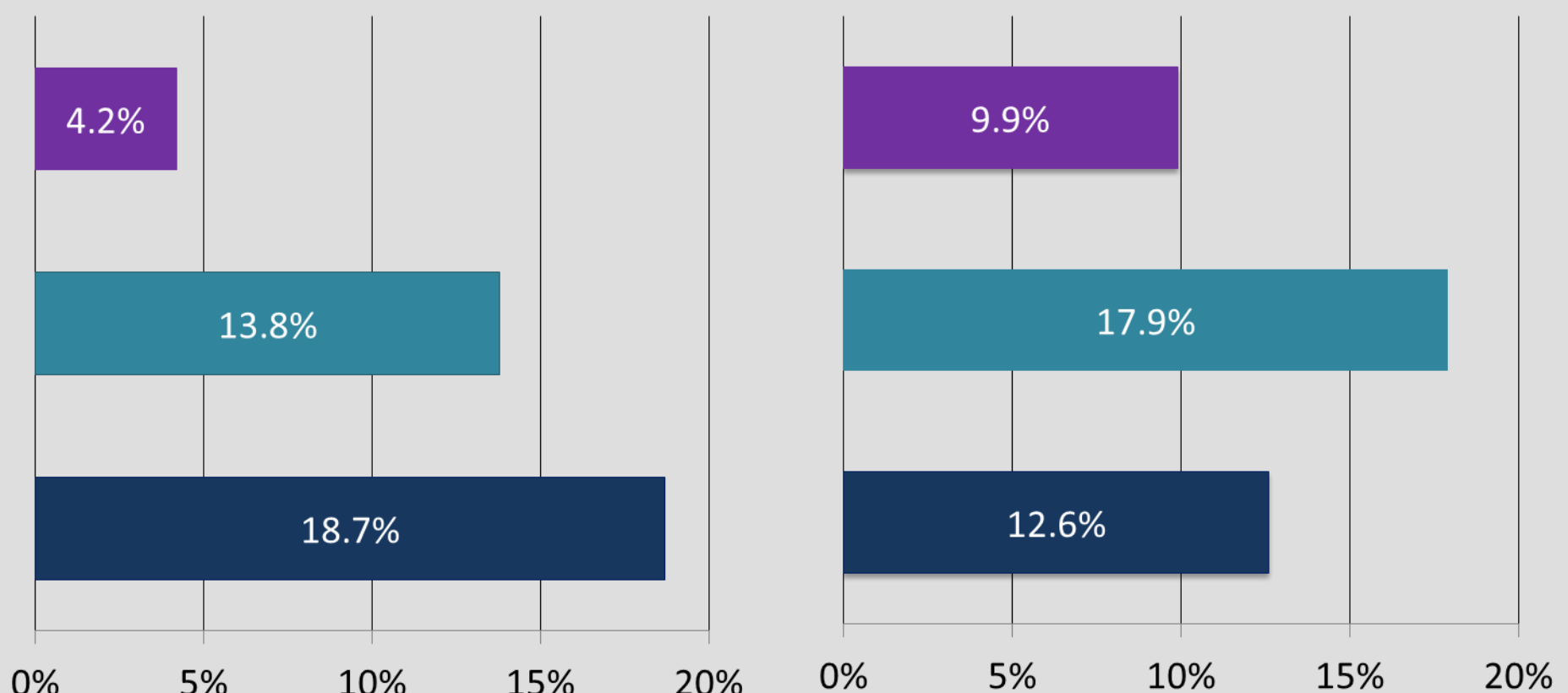


* Grocery = 23.1% Traditional Grocery Outlets, 3.2% Walmart Neighborhood

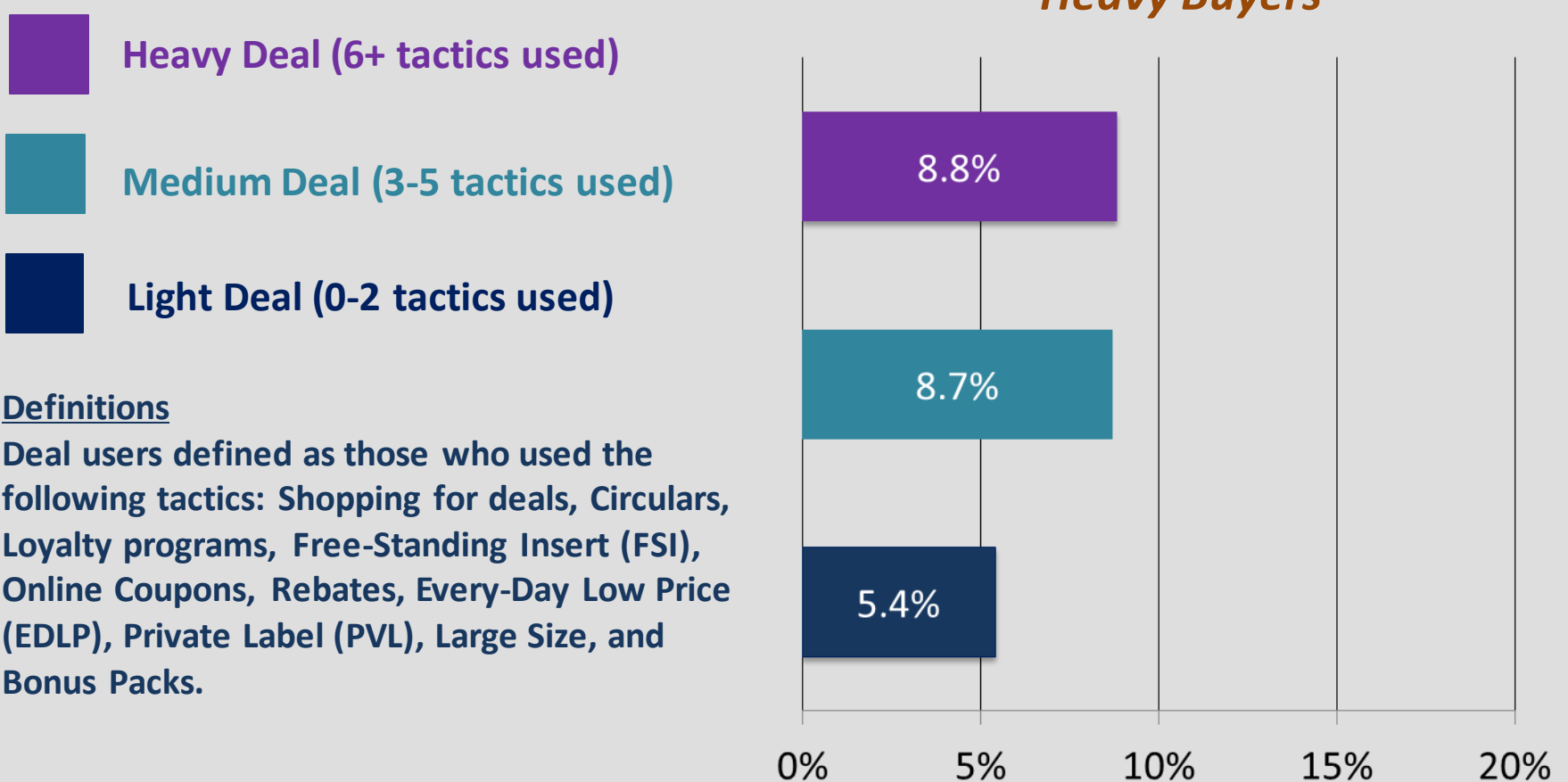
Both medium and heavy buyers of food and beverage consumables categories are more than twice as likely to be heavy deal shoppers. But there appears to be a point at which heavier buyers start using fewer deals.

Light Buyers

Medium Buyers



Heavy Buyers

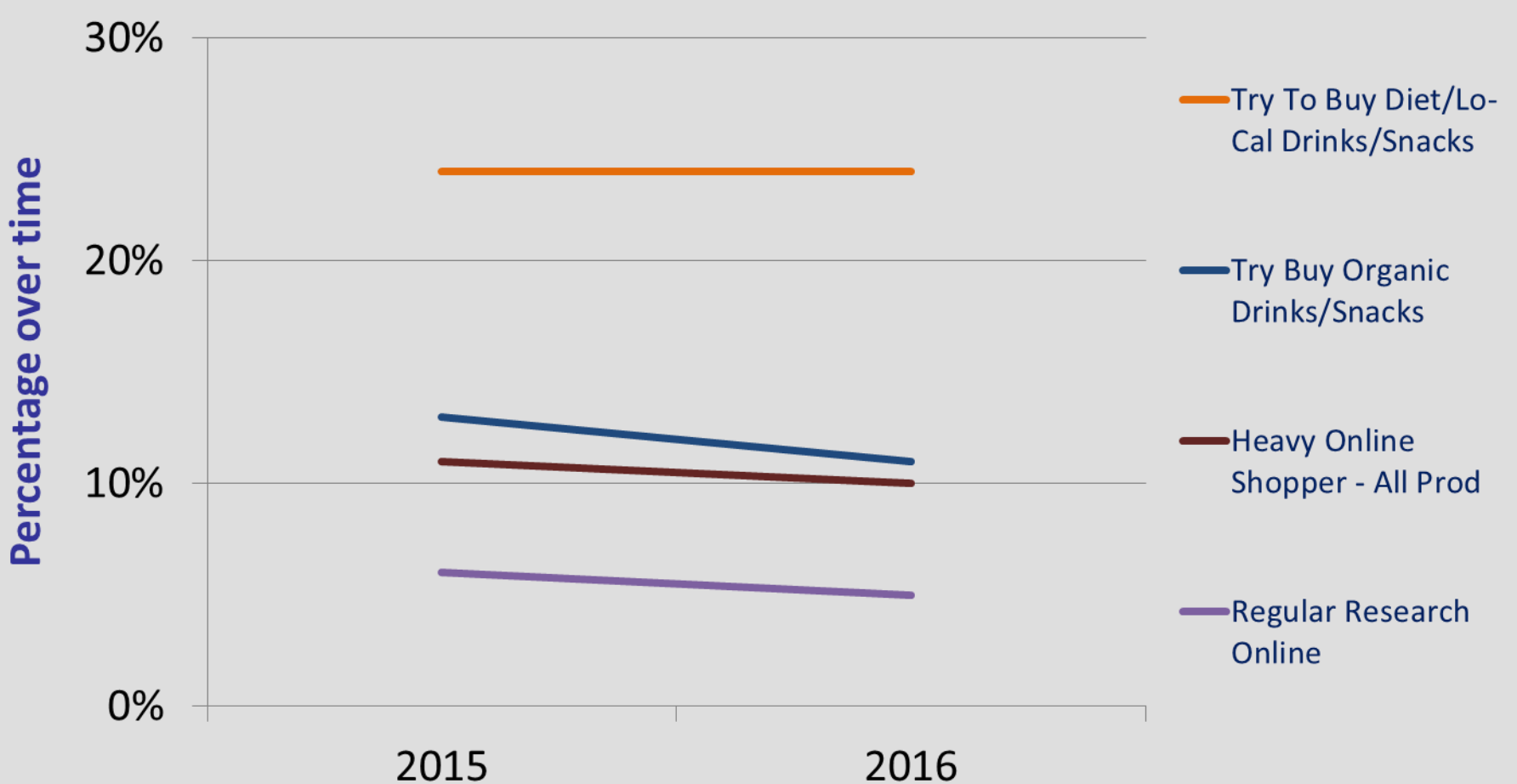


Definitions

Deal users defined as those who used the following tactics: Shopping for deals, Circulars, Loyalty programs, Free-Standing Insert (FSI), Online Coupons, Rebates, Every-Day Low Price (EDLP), Private Label (PVL), Large Size, and Bonus Packs.

Despite a heavy emphasis and capital investment, the four popular concepts below remain low on most consumers' radar in the food and beverage categories surveyed.

Agree with the Stated Concept



TABS Analytics



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Source: TABS Analytics 2016 Food & Beverage Study. 1,000 General Population Adults ages 18-75. "Food & Beverage" Sector defined as the following consumables categories: Candy, Carbonated Beverages, Cereal, Cookies, Crackers, Frozen Pizza, Fruit Juice, Ice Cream, Novelties, Popcorn, Refrigerated Juice, Salty Snacks, Sports Drinks, Water, and Yogurt.