

Household Purchase Dynamics in the Beverage Category

Nielsen Homescan Household Purchase Analysis

Florida Department of Citrus

March 2026



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Objectives

- **Identify Beverage Purchase Trends**
 - Provide an overview of beverage category purchase patterns and trends.
 - Identify changing dynamics among orange juice (OJ), grapefruit juice (GJ), and competitive fruit juices.
 - Detail OJ and GJ household purchasing trends.

Parameters

- **The Homescan Consumer Purchase Panel plus Enhanced Trip Projection:**
 - 3.05 million “Raw Occasions” used for sample
 - 128.9 million Buyers assumed for projection
 - **See Appendix for more information on methodology changes**
- **The Data:**
 - All UPC coded purchases from all outlets (over 8,000 unique UPCs)
 - Consumer perceived details (i.e., coupons & store sales)
- **Time Periods:**
 - 2024 Year-Ago (12/31/2023 - 12/28/2024) vs.
 - 2025 Year (12/29/2024 to 12/27/2025)
- **Volume:**
 - Equivalent (EQ) gallons
 - **NOTE:** Equivalent gallons in Nielsen Panel data are derived from estimated unit sizes and volumes sold. While dollar sales align, equivalent gallons may not reconcile with the FDOC custom database which is maintained monthly.

Parameters

- **Geography:**
 - Total U.S., All Outlets
- **Category Definition:**
 - TOTAL BEVERAGES is disaggregated into the following segments:
 - Carbonated Soft Drinks (CSD)
 - Ref, White & Flavored Milk
 - Liquid Tea
 - Dry Coffee
 - Isotonics
 - Bottled Water
 - Shakes & meal replacement drinks
 - Plant-based milk alternatives (e.g., oat, almond)
 - Coffee creamer (disaggregated to monitor consumer trends)
 - Non-Carb Soft Drinks (non CSD)
 - Liquid Coffee
 - Dry Tea
 - Fruit Juices & Drinks
 - Vegetable Juice/Drinks
 - Sparkling Water
 - Functional Beverages
 - **NOTE:** Nielsen Panel data uses syndicated definitions not maintained as frequently as the FDOC custom database.

Parameters

- **Definition of Measures:**

- **Household Penetration**

- Percentage of U.S. Households (HHs) buying product at retail*

- **Buying Rate**

- Average number of gallons purchased annually at retail by Buying HHs*

- **Purchase Frequency**

- Average number of times per year product was purchased at retail by Buying HHs*

- **Purchase Size**

- Average amount (gallons) purchased every time product is purchased at retail*

- **% Purchased on Perceived Deal**

- Percent of product bought at retail when Buyer thought it was on deal
(coupon, shelf discount, etc.)*

Parameters

- **Acronyms and Abbreviations**

- AO = All Other
- Btl = Bottled
- Cof Crm = Coffee Creamer
- CSD = Carbonated Soft Drink
- Dk = Drink
- Frt = Fruit
- GJ = Grapefruit Juice
- HHs = Households
- JC = Juice
- Lite OJ = Orange Juice Drink containing 40% to 99.9% OJ
- NFC = Not From Concentrate
- Non CSD = Non-Carbonated Soft Drink (e.g., Kool Aid)
- OJ = Orange Juice
- Recon = Reconstituted
- Sprkl = Sparkling
- TL = Total
- WHC = Warehouse Club (e.g., Sam's, Costco)

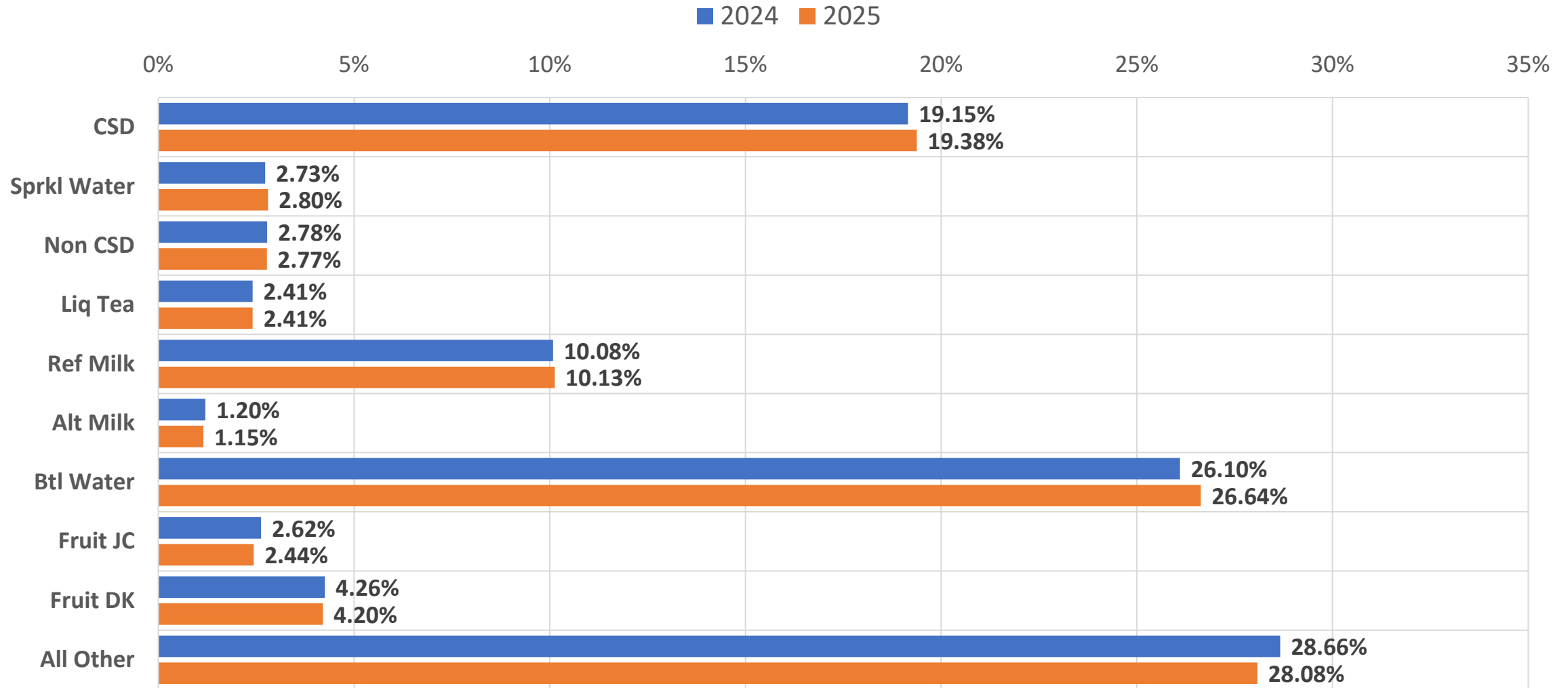
Parameters

- **Reported Here:**
 - Market Summary Findings for 2025
 - *Products*
 - *Channels (types of retail stores)*
 - *Measures*
 - *Buyer groups*
 - Two-Year Trends (2024 vs. 2025)



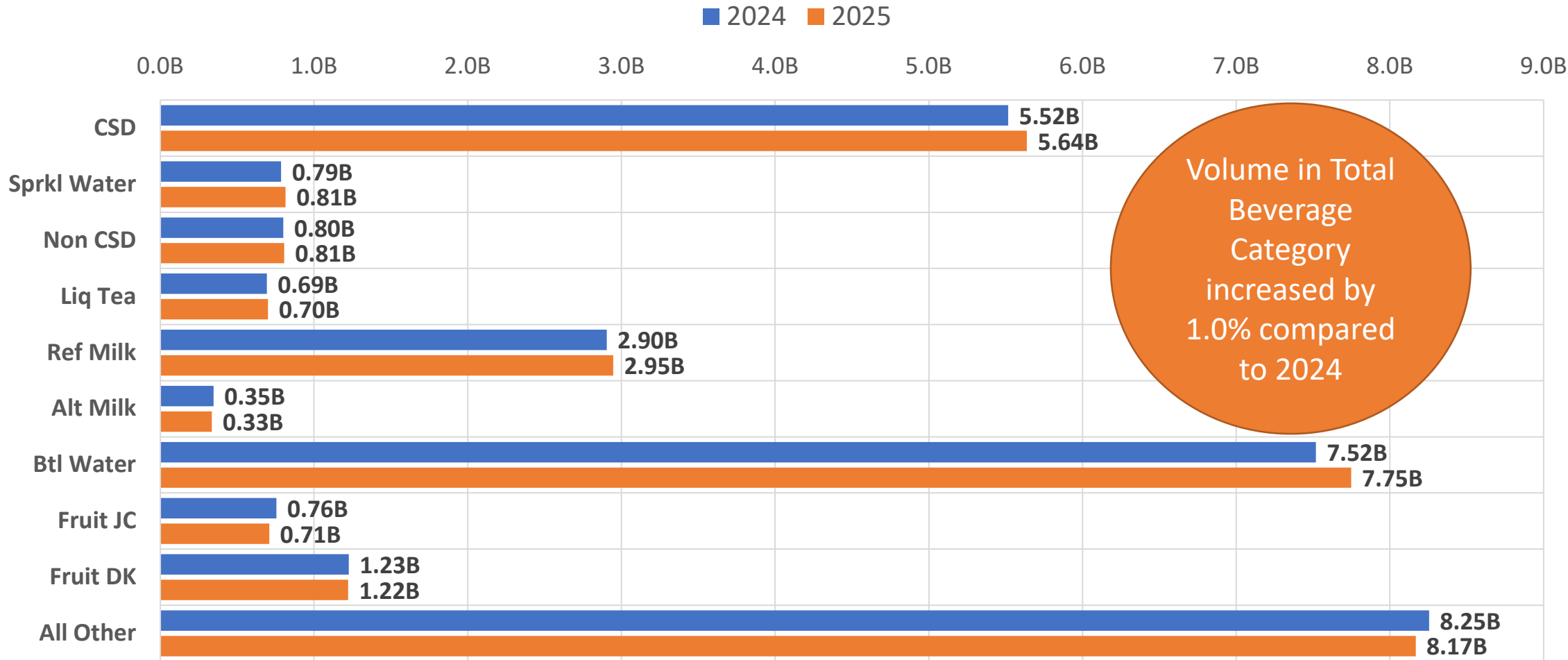
Volume & Share Trends in Beverage Categories

Beverage Category Gallon Shares



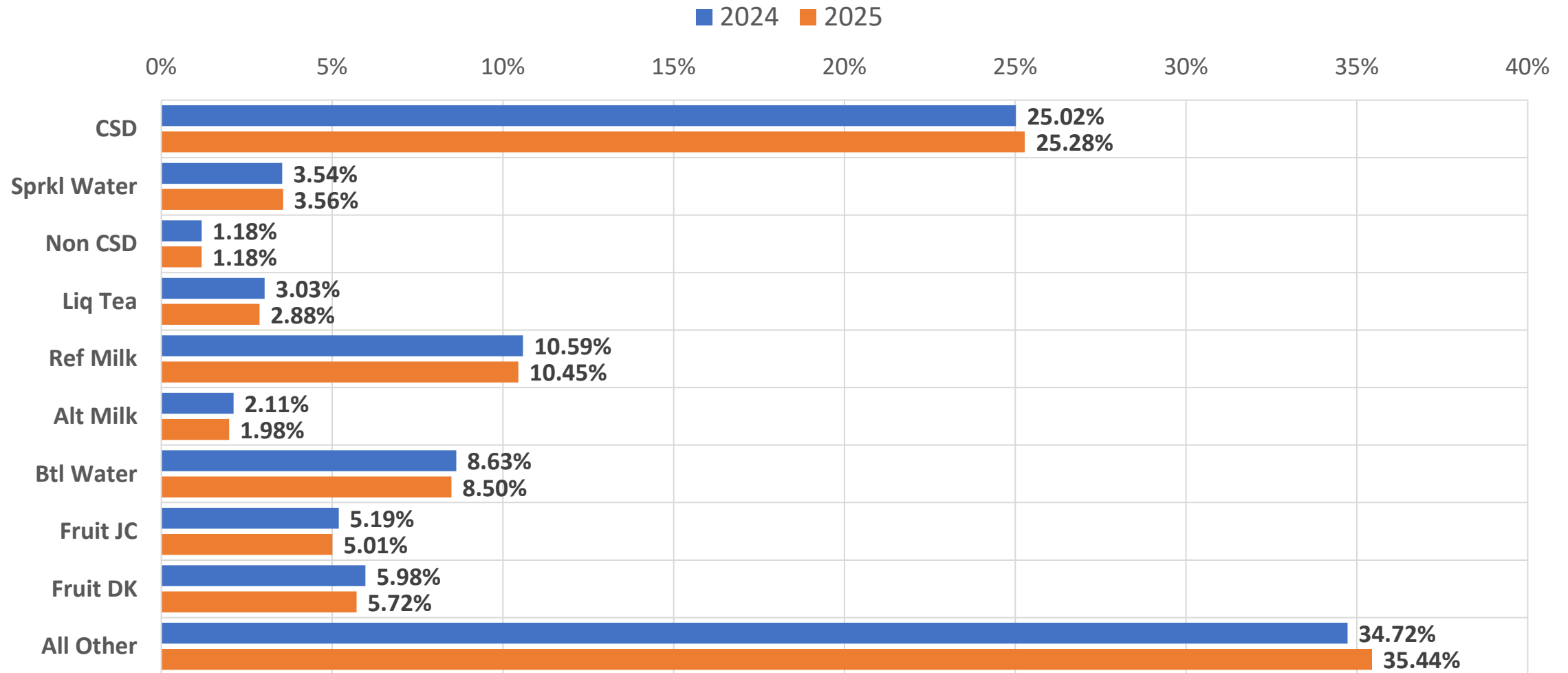
Source: Nielsen Homescan data for Y/E Dec 2025

Beverage Categories (in billions of gallons)



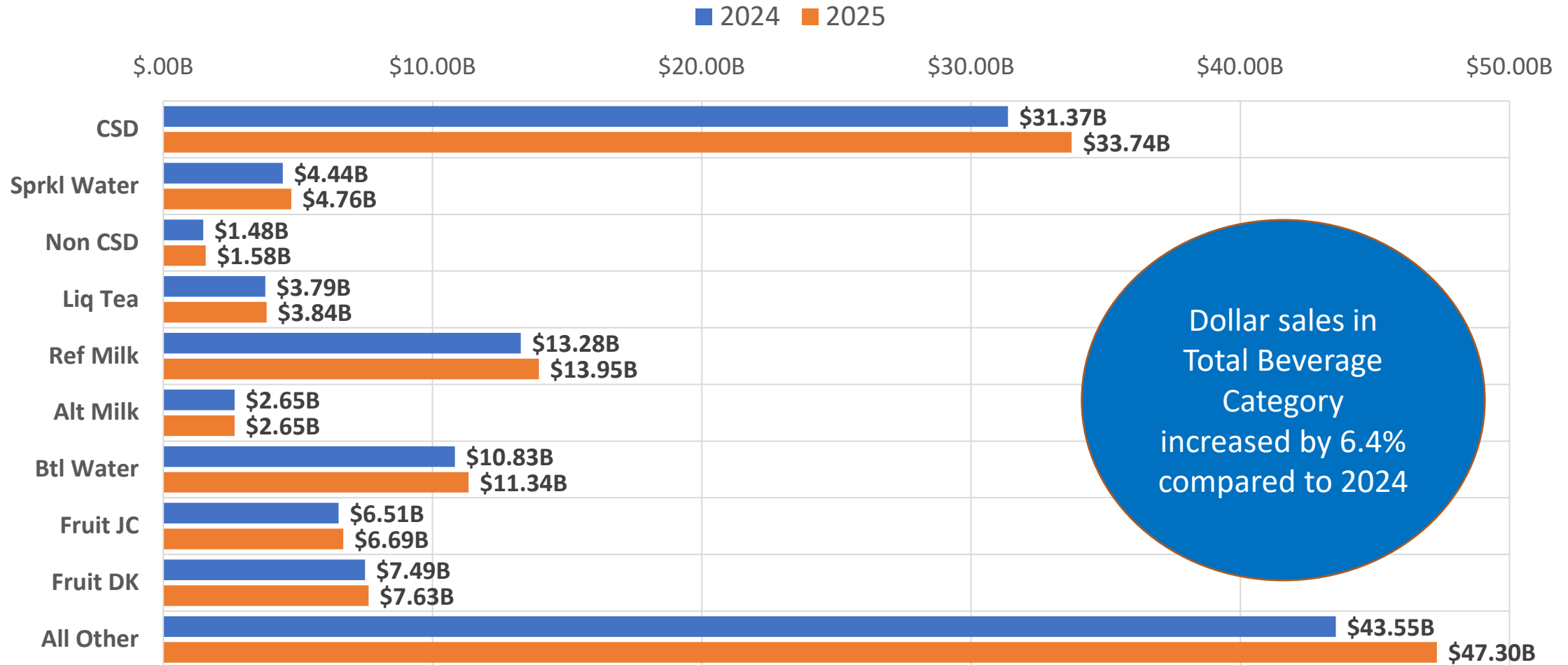
Source: Nielsen Homescan data for Y/E Dec 2025

Beverage Category Dollar Shares



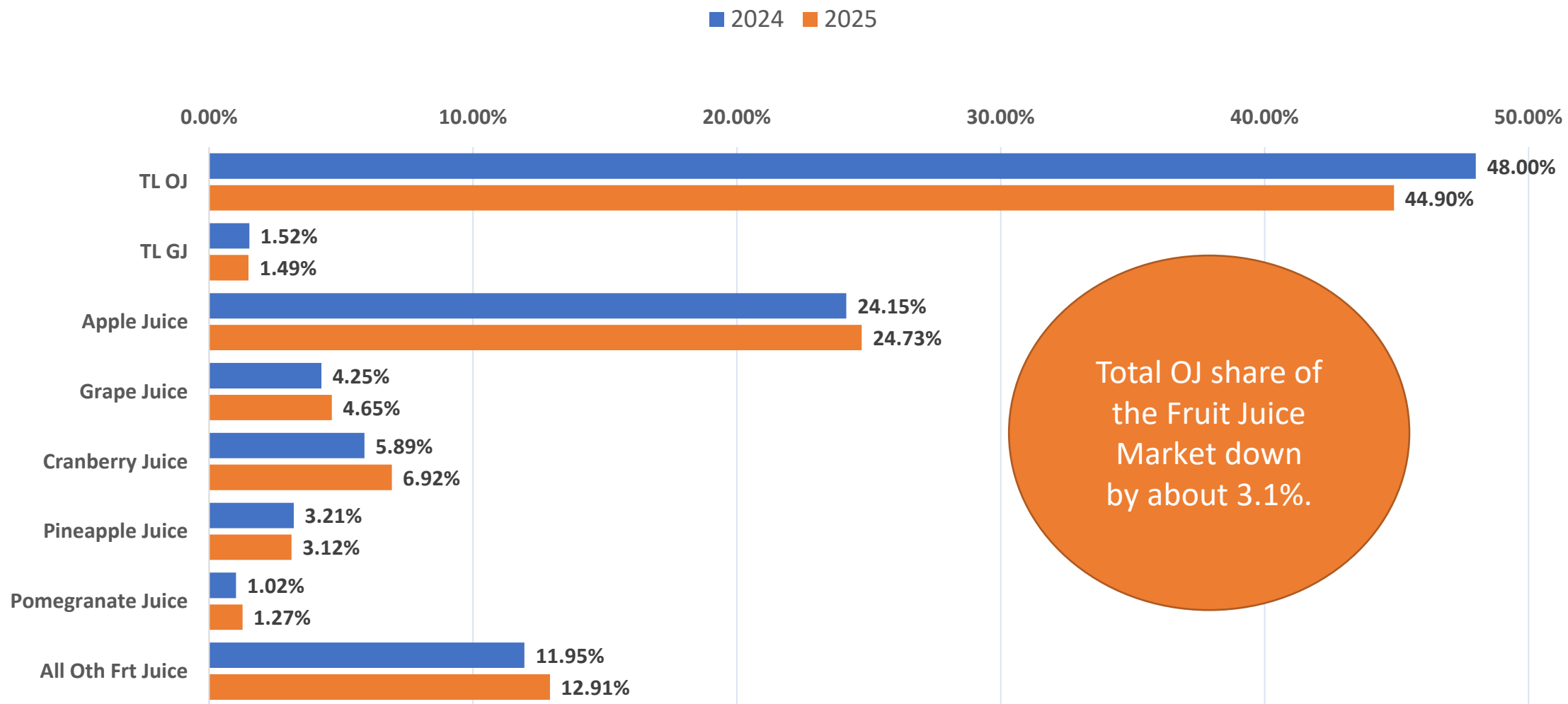
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Beverage Categories (in billions of dollars)



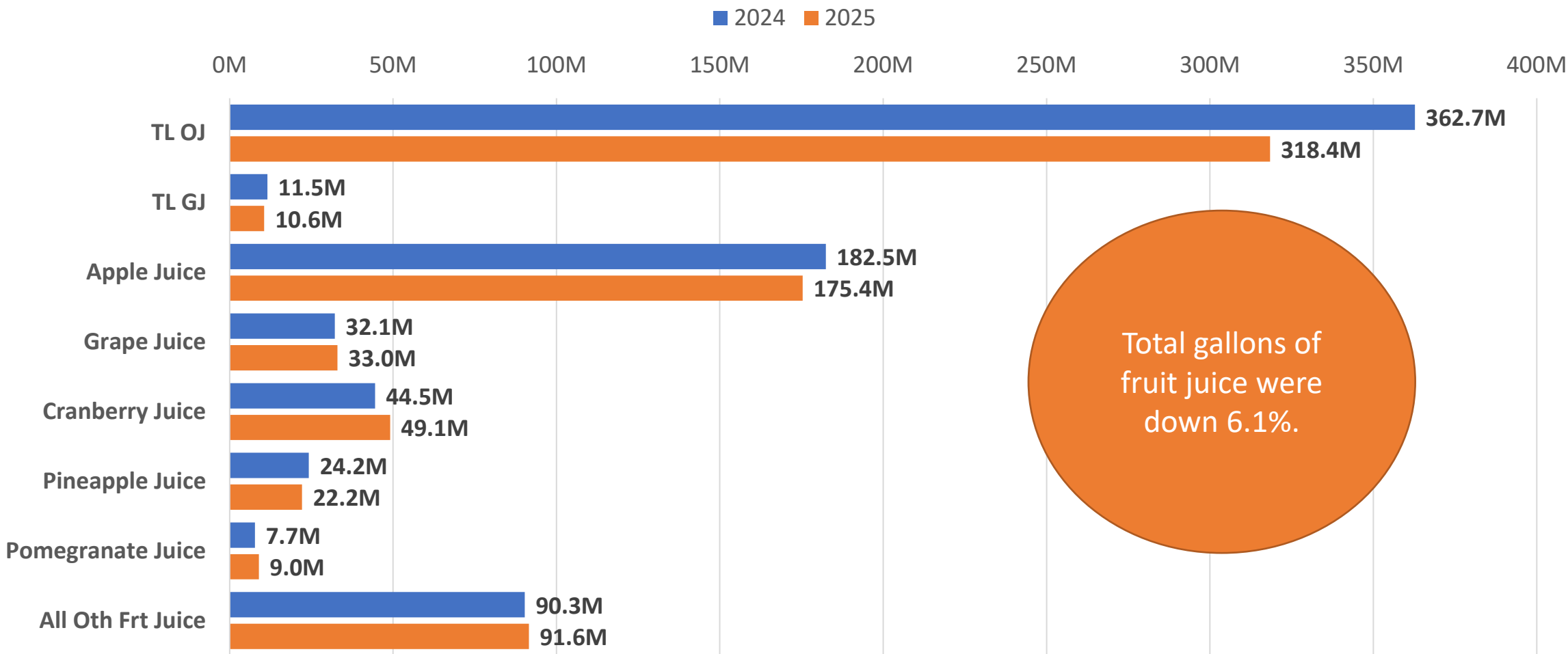
Source: Nielsen Homescan data for Y/E Dec 2025

Fruit Juice (gallon shares)



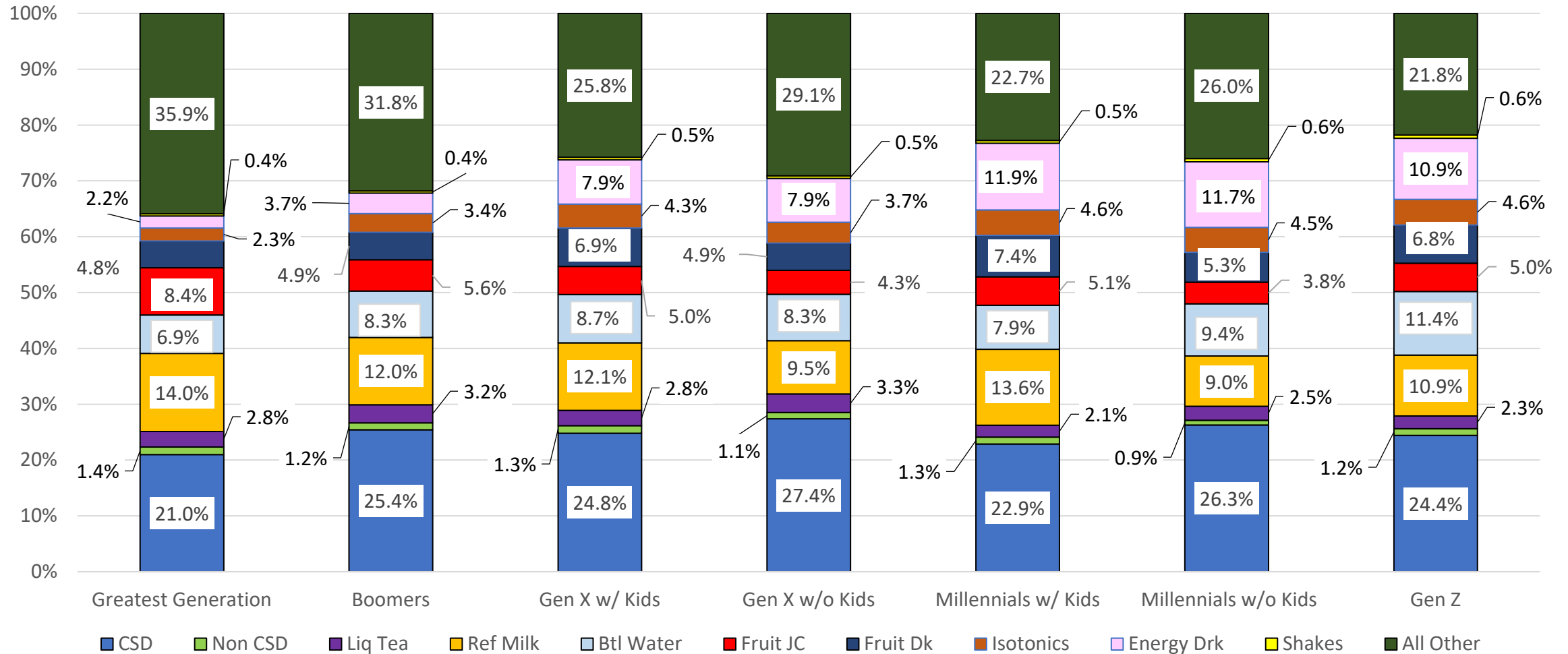
Source: Nielsen Homescan data for Y/E Dec 2025

Fruit Juice (in millions of gallons)



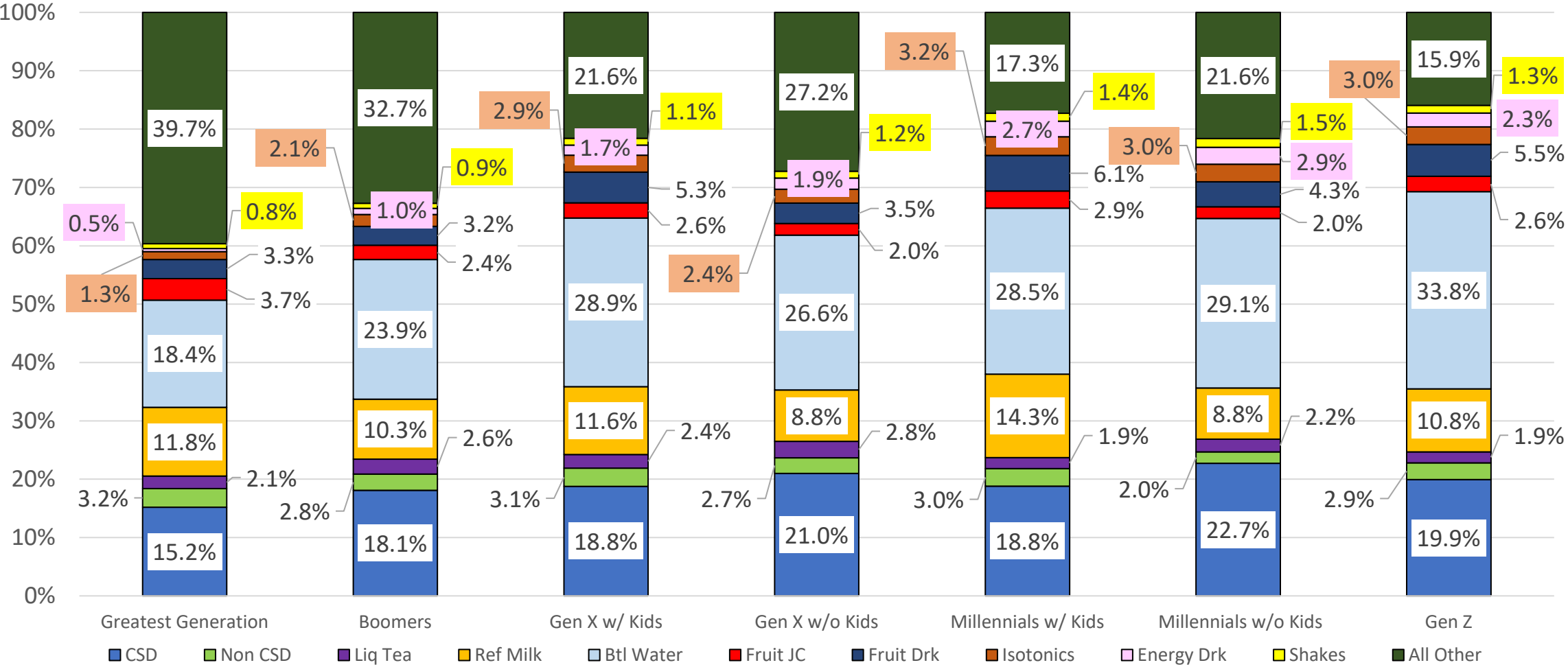
Source: Nielsen Homescan data for Y/E Dec 2025

Beverage Category Dollar Shares (2025)



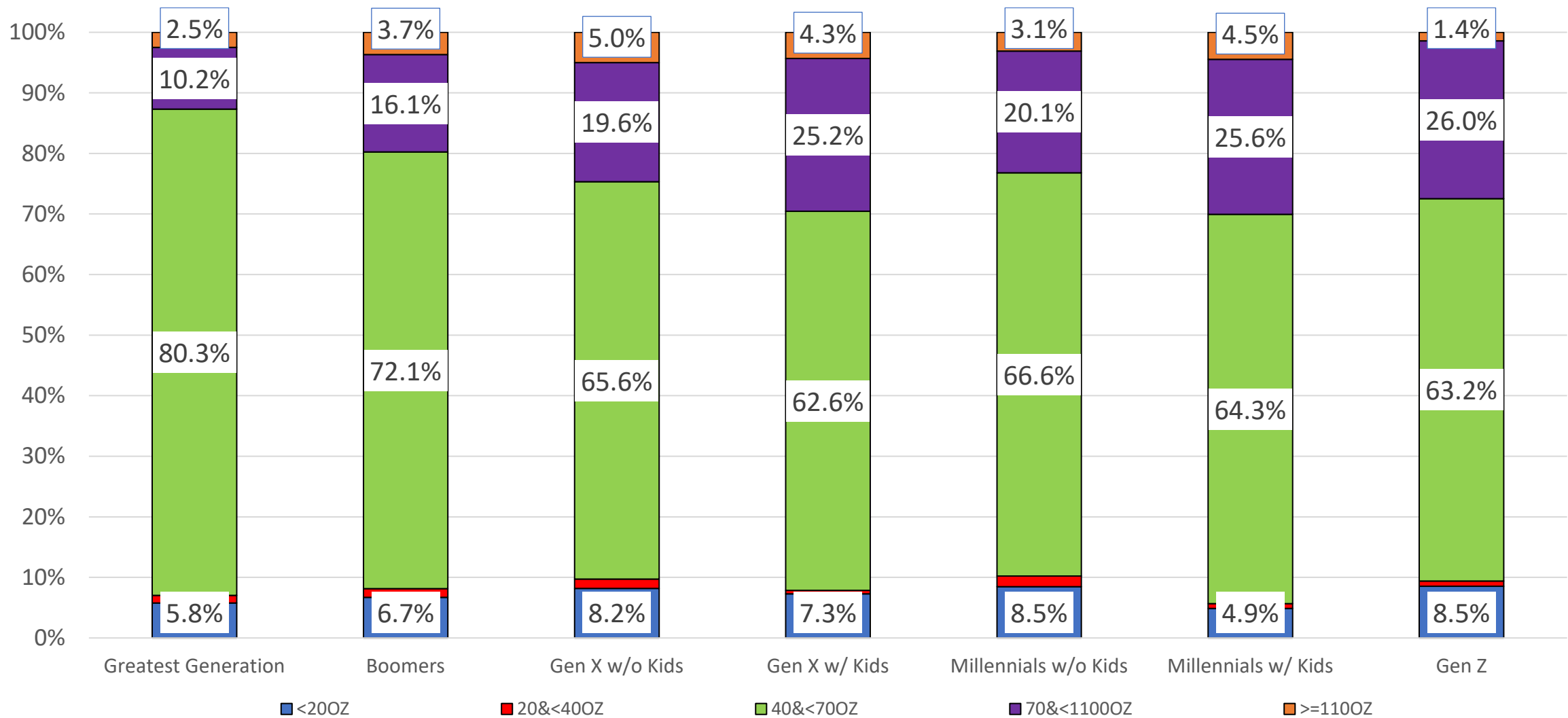
Source: Nielsen Homescan data for Y/E Dec 2025

Beverage Category Volume Shares in (2025)



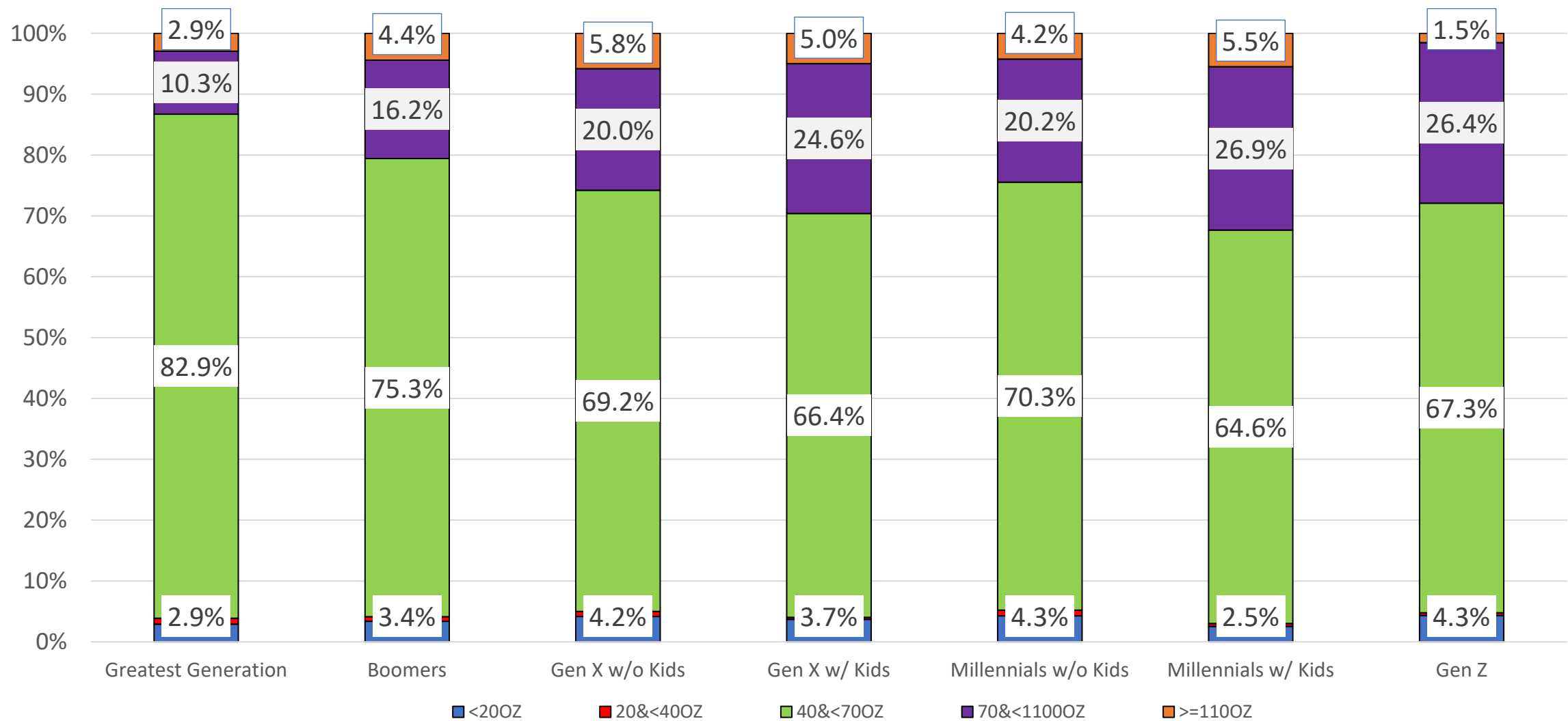
Source: Nielsen Homescan data for Y/E Dec 2025

OJ NFC Dollar Shares (2025)



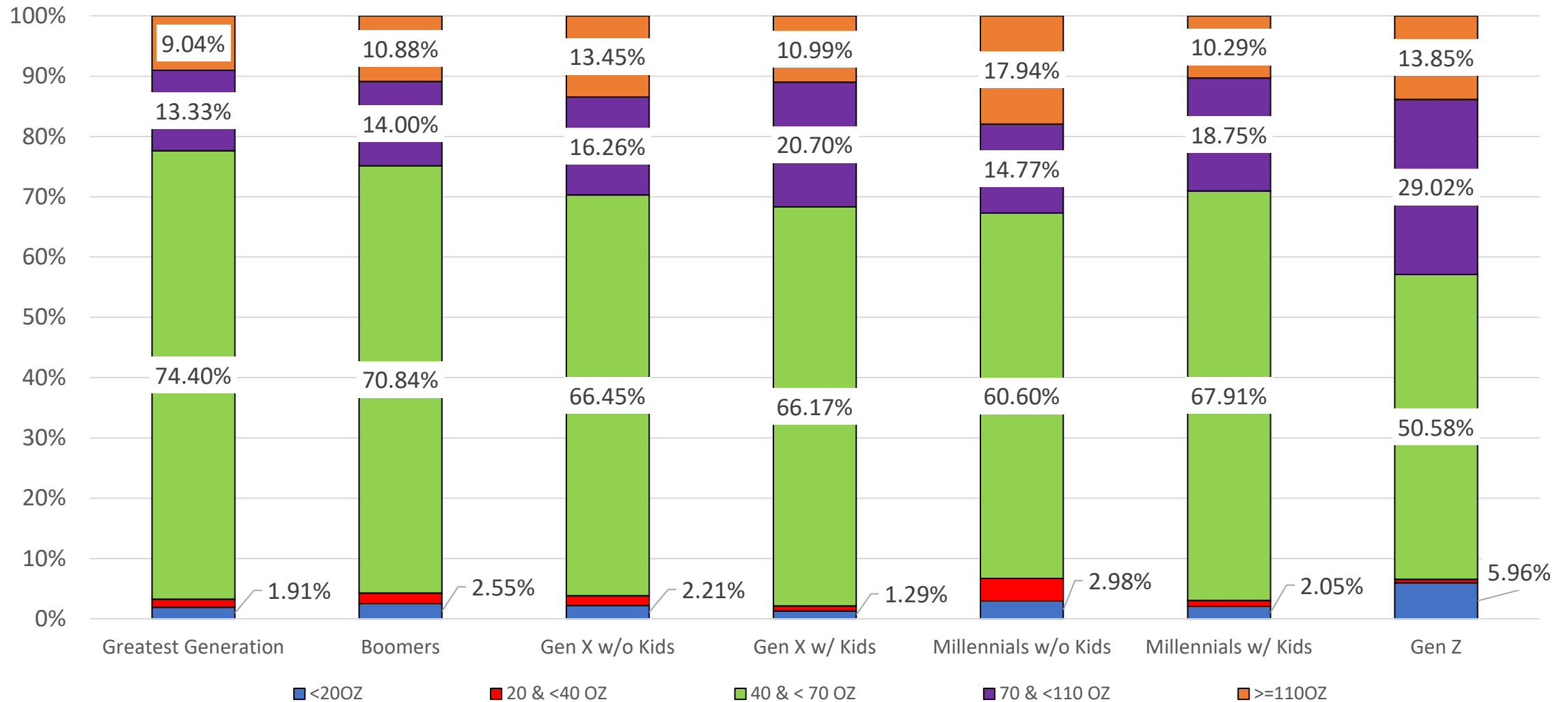
Source: Nielsen Homescan data for Y/E Dec 2025

OJ NFC Volume Shares (2025)



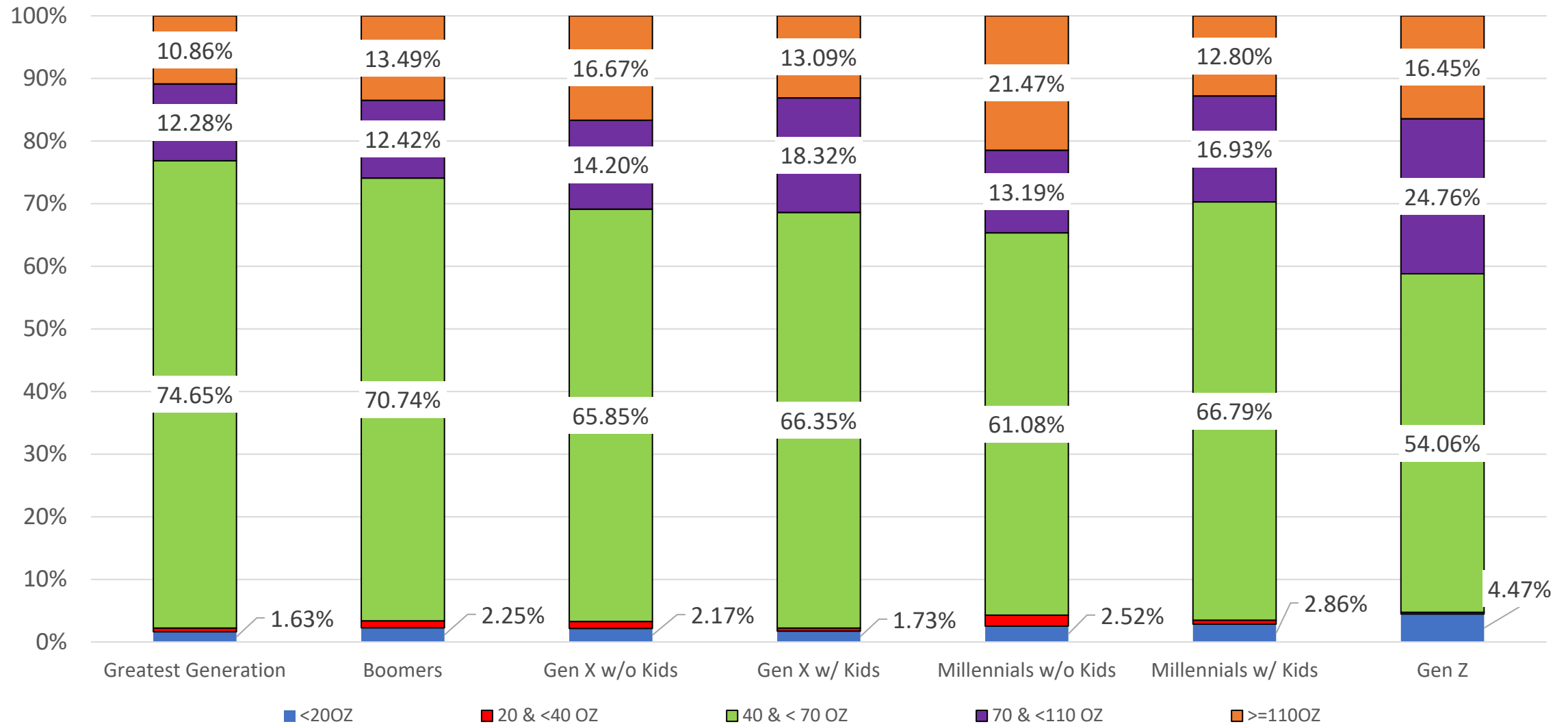
Source: Nielsen Homescan data for Y/E Dec 2025

OJ Recon Dollar Shares (2025)



Source: Nielsen Homescan data for Y/E Dec 2025

OJ Recon Volume Shares (2025)

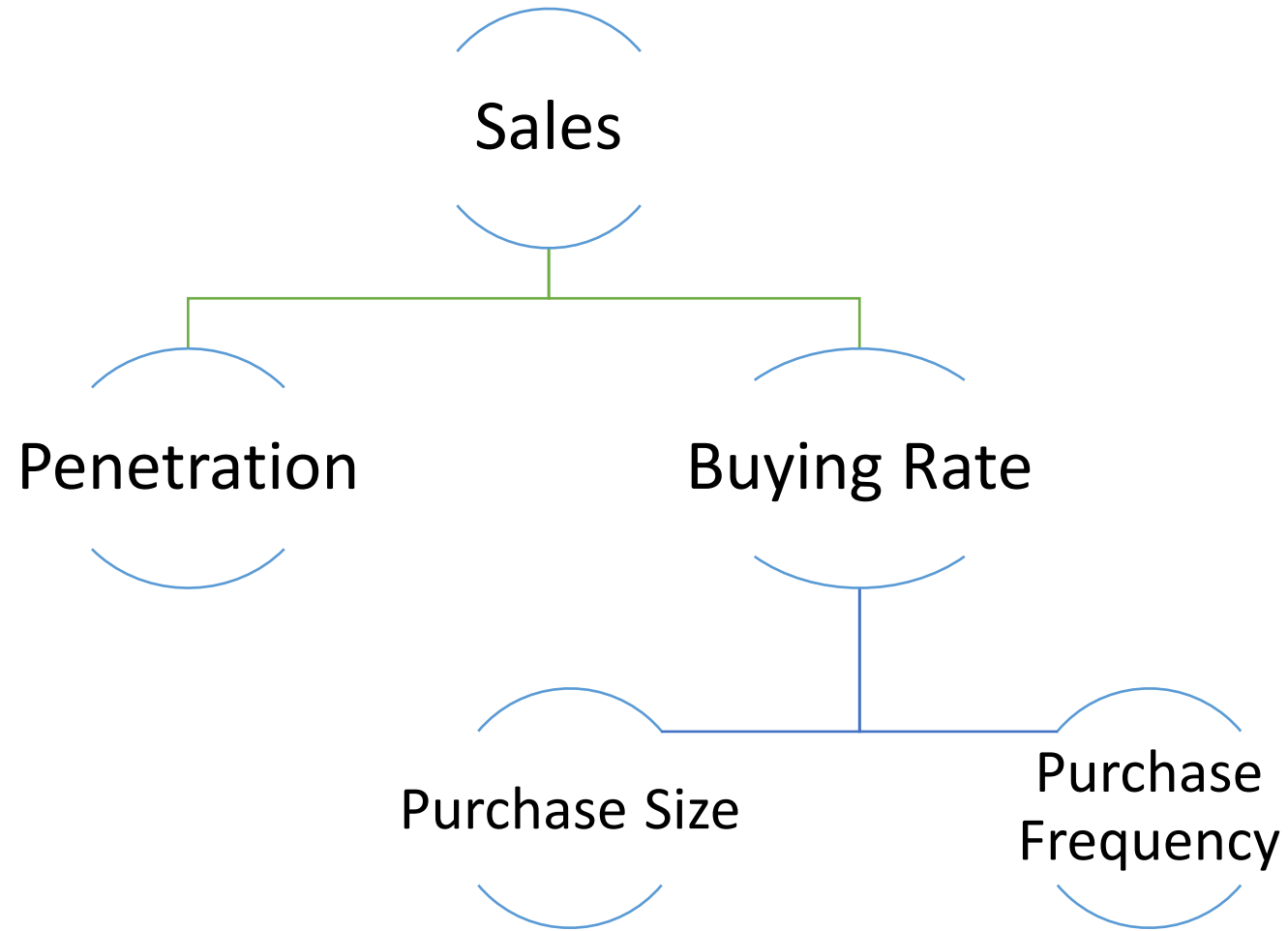


Source: Nielsen Homescan data for Y/E Dec 2025



Beverage Category Purchasing Overview

Nielsen Components of Product Sales

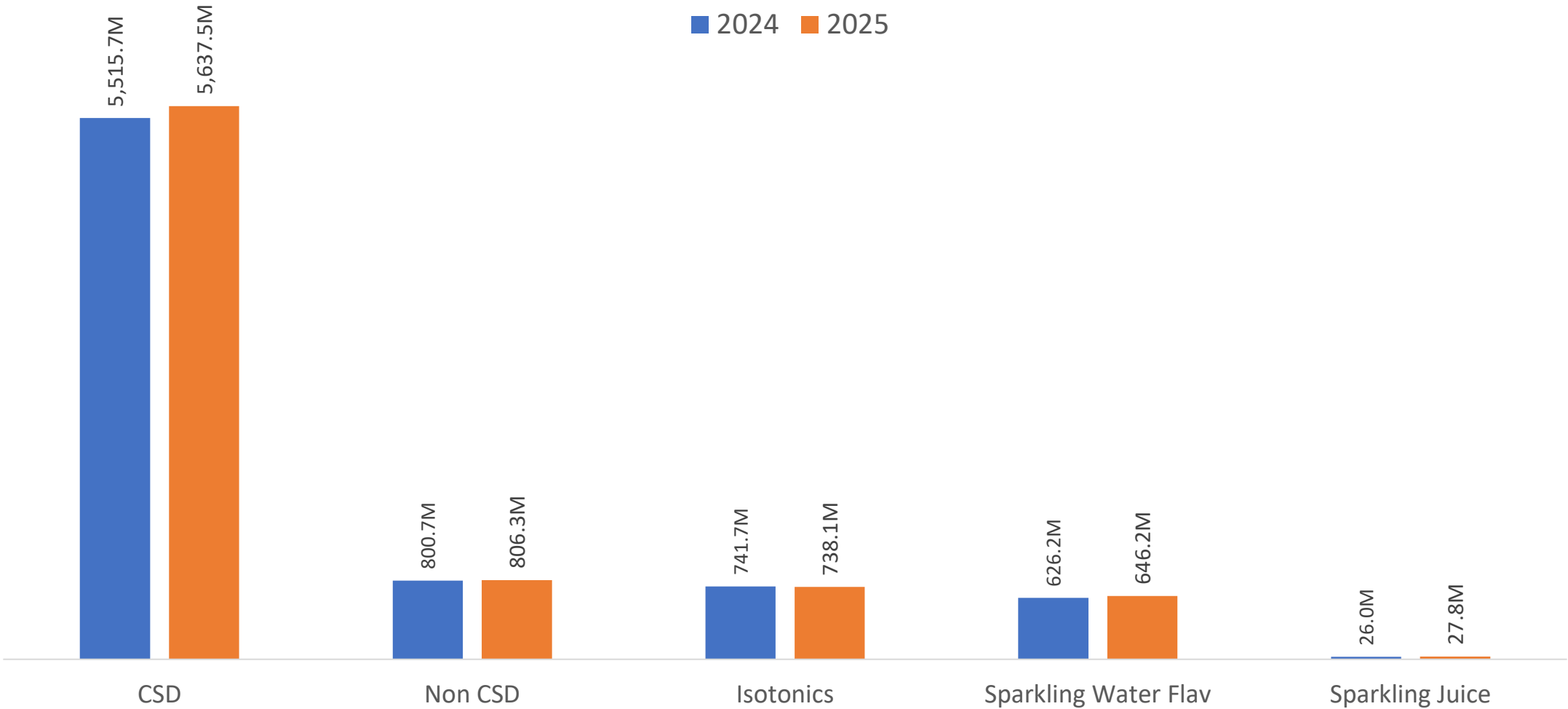


Beverage Categories

1. Soft Drinks
2. Functional Bev.
3. Water
4. Milk
5. Tea/Coffee
6. Fruit Drinks
7. 100% Juices

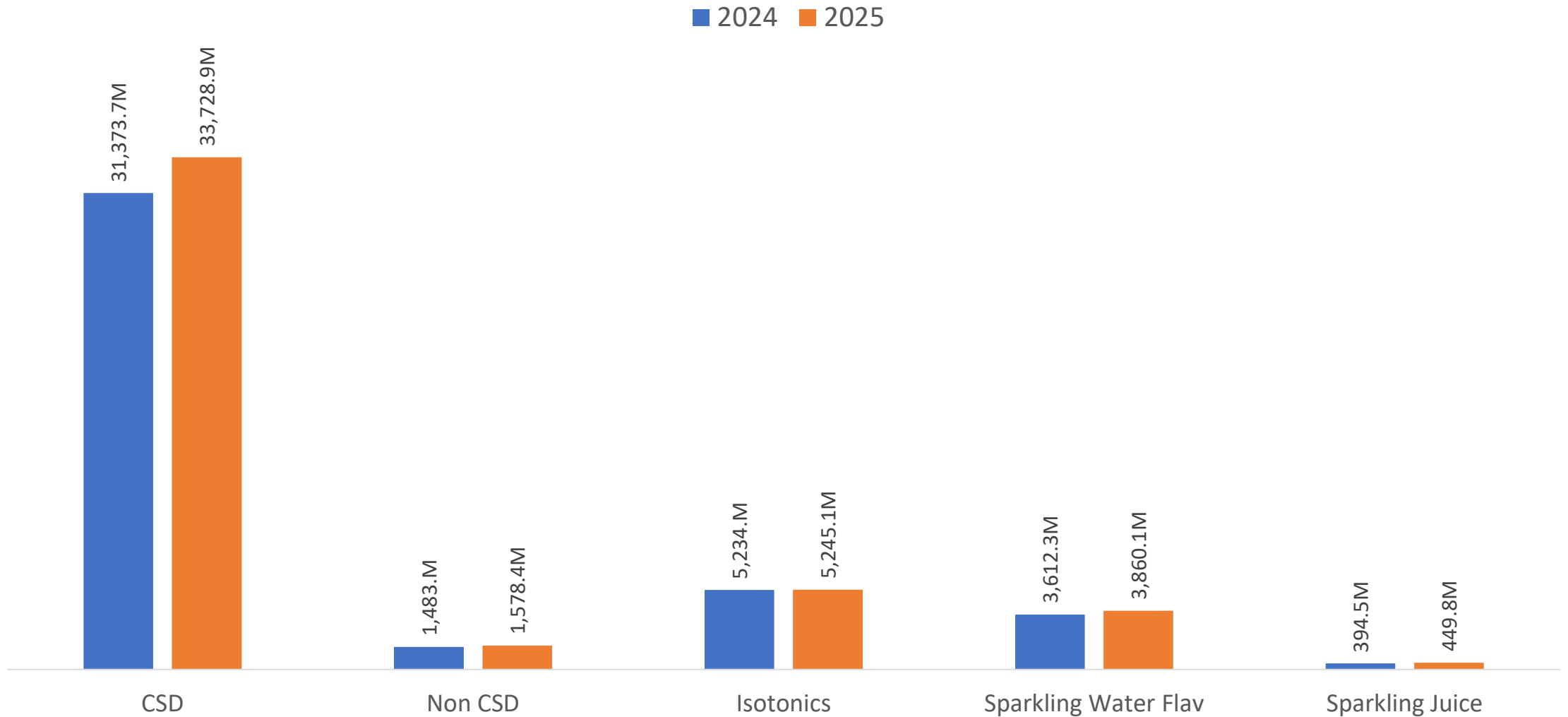


Soft Drink –Volume Sales



Source: Nielsen Homescan data for Y/E Dec 2025

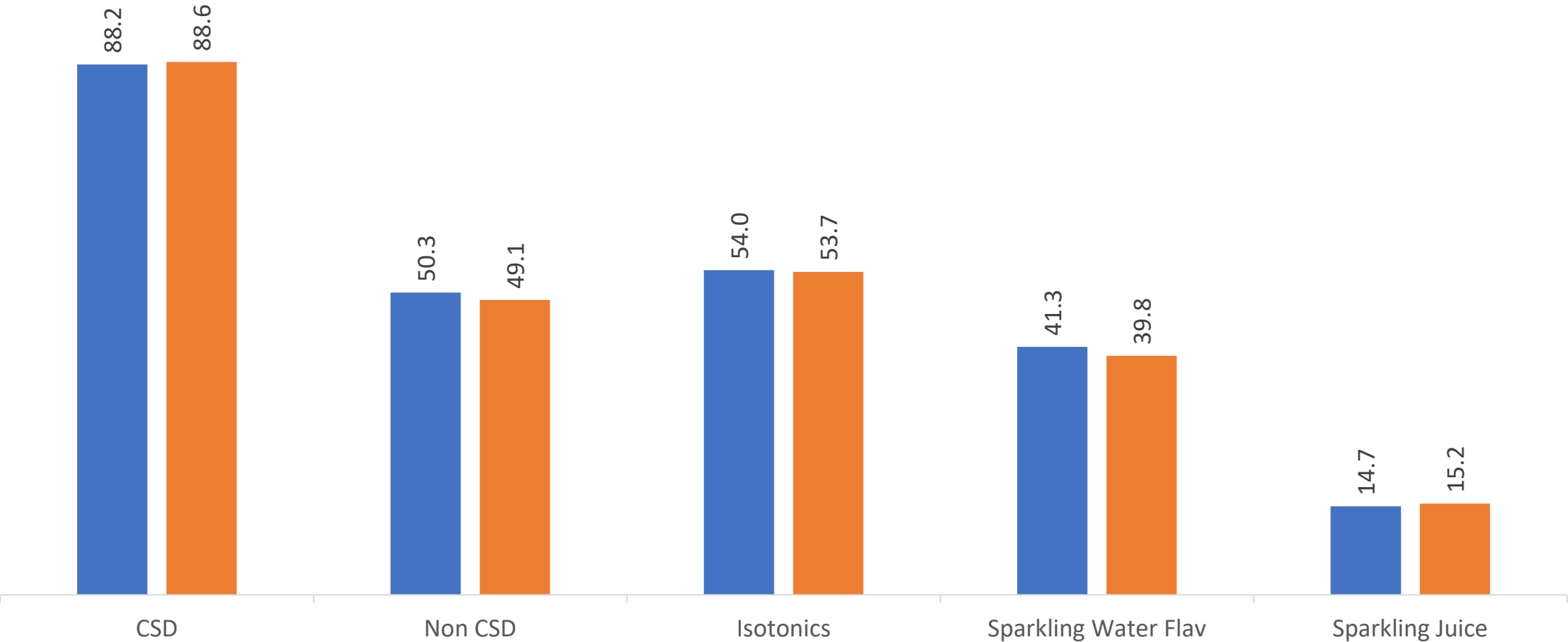
Soft Drink –Dollar Sales



Source: Nielsen Homescan data for Y/E Dec 2025

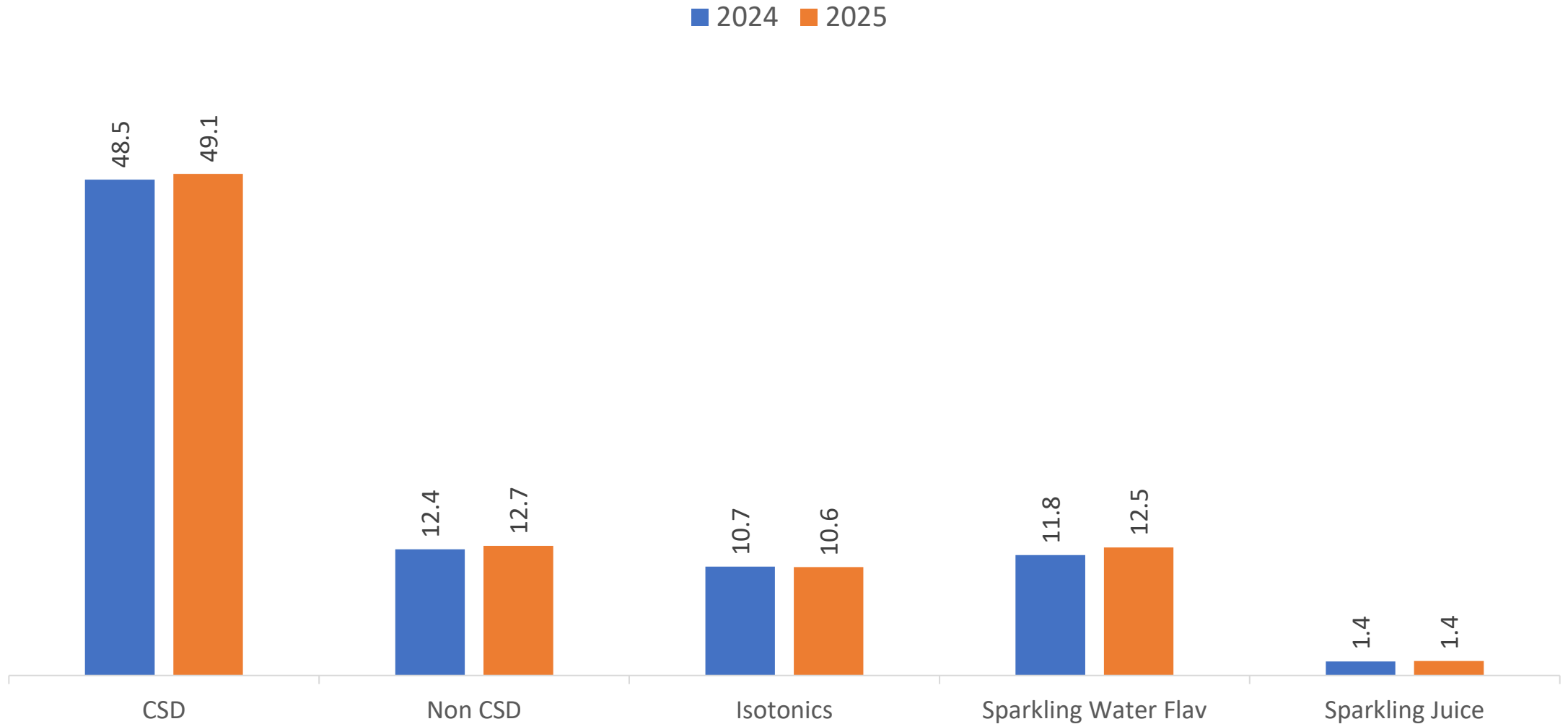
Soft Drink –Penetration

■ 2024 ■ 2025



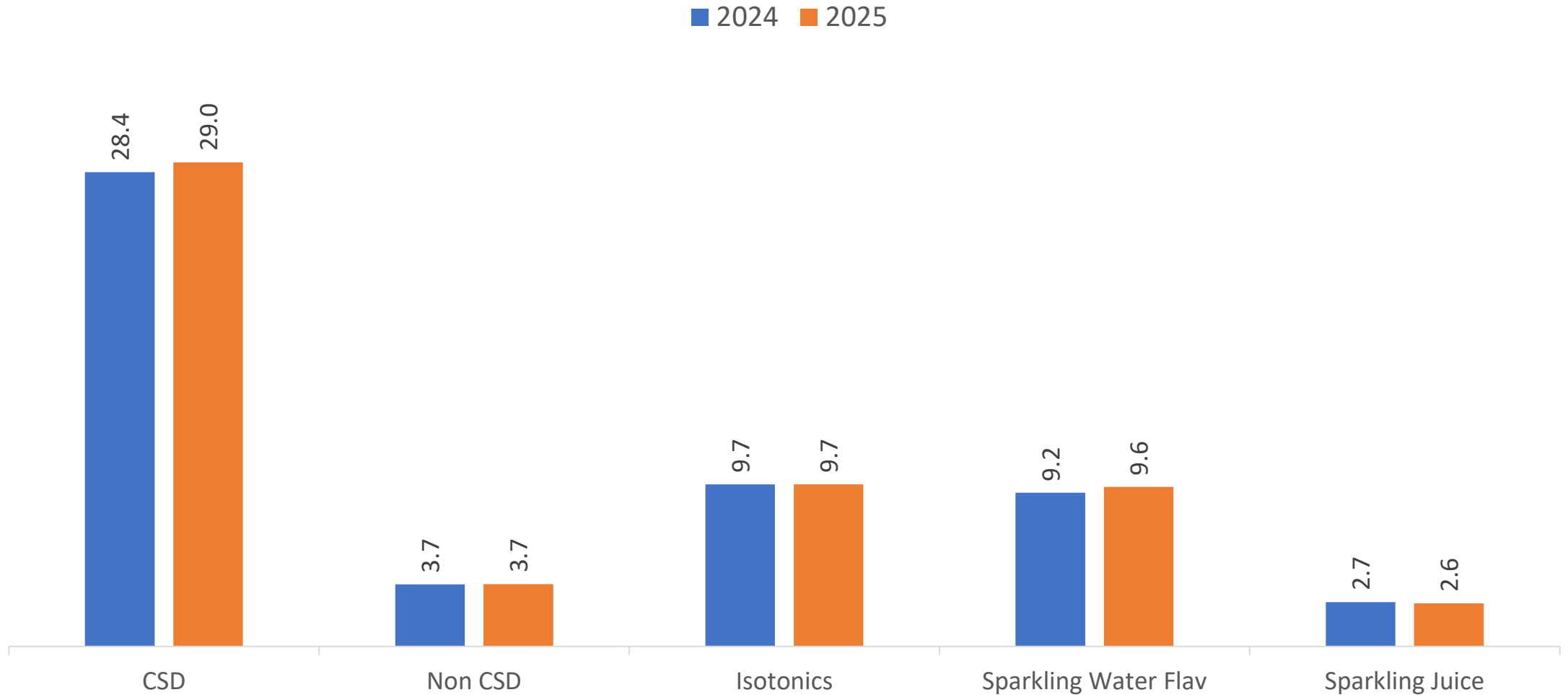
Source: Nielsen Homescan data for Y/E Dec 2025

Soft Drink –Buying Rate



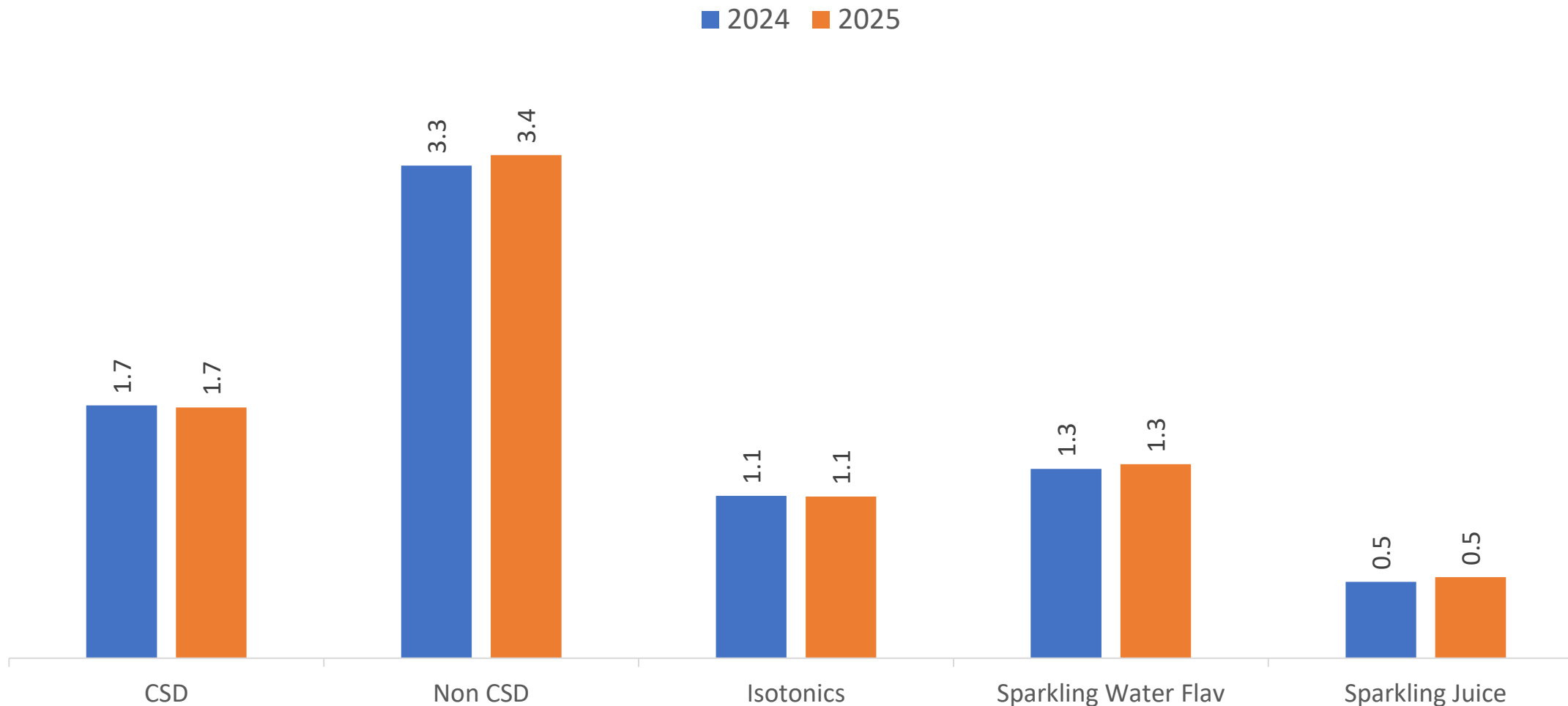
Source: Nielsen Homescan data for Y/E Dec 2025

Soft Drink –Purchase Frequency



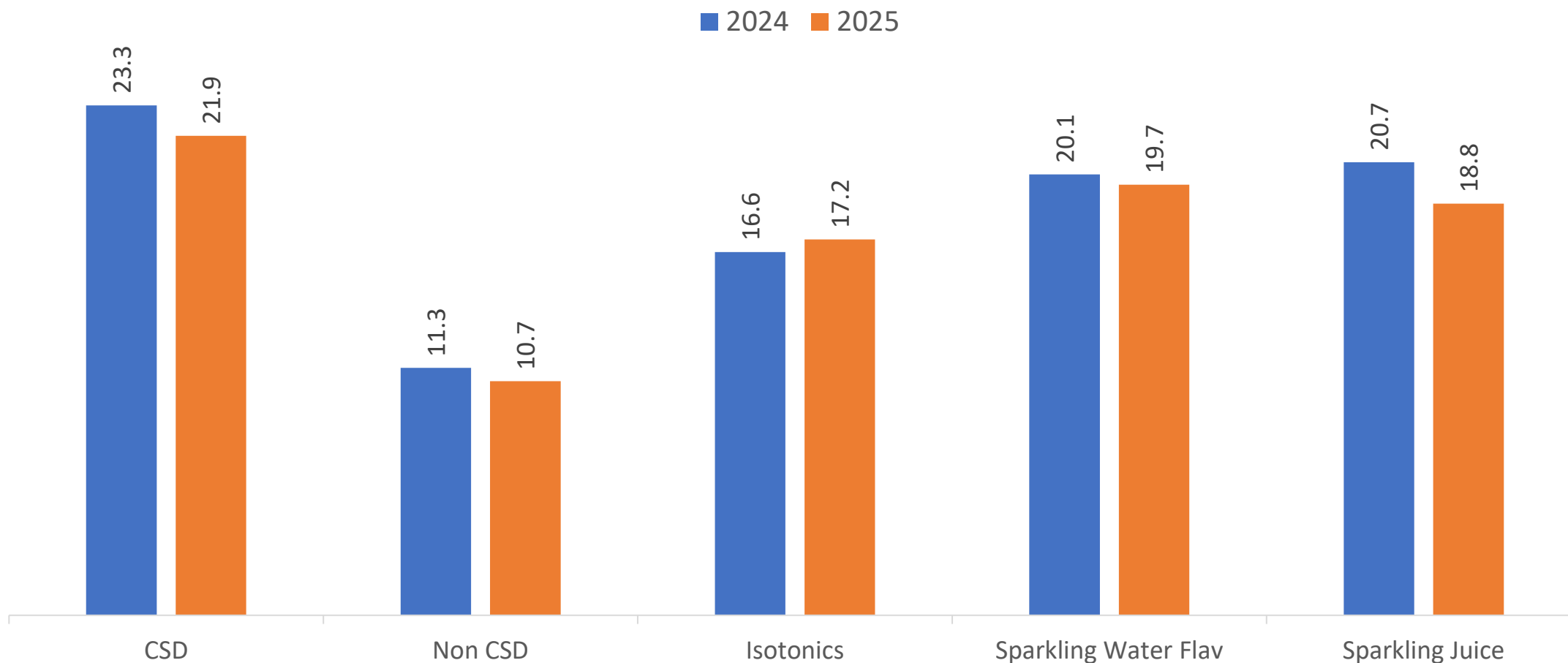
Source: Nielsen Homescan data for Y/E Dec 2025

Soft Drink –Purchase Size



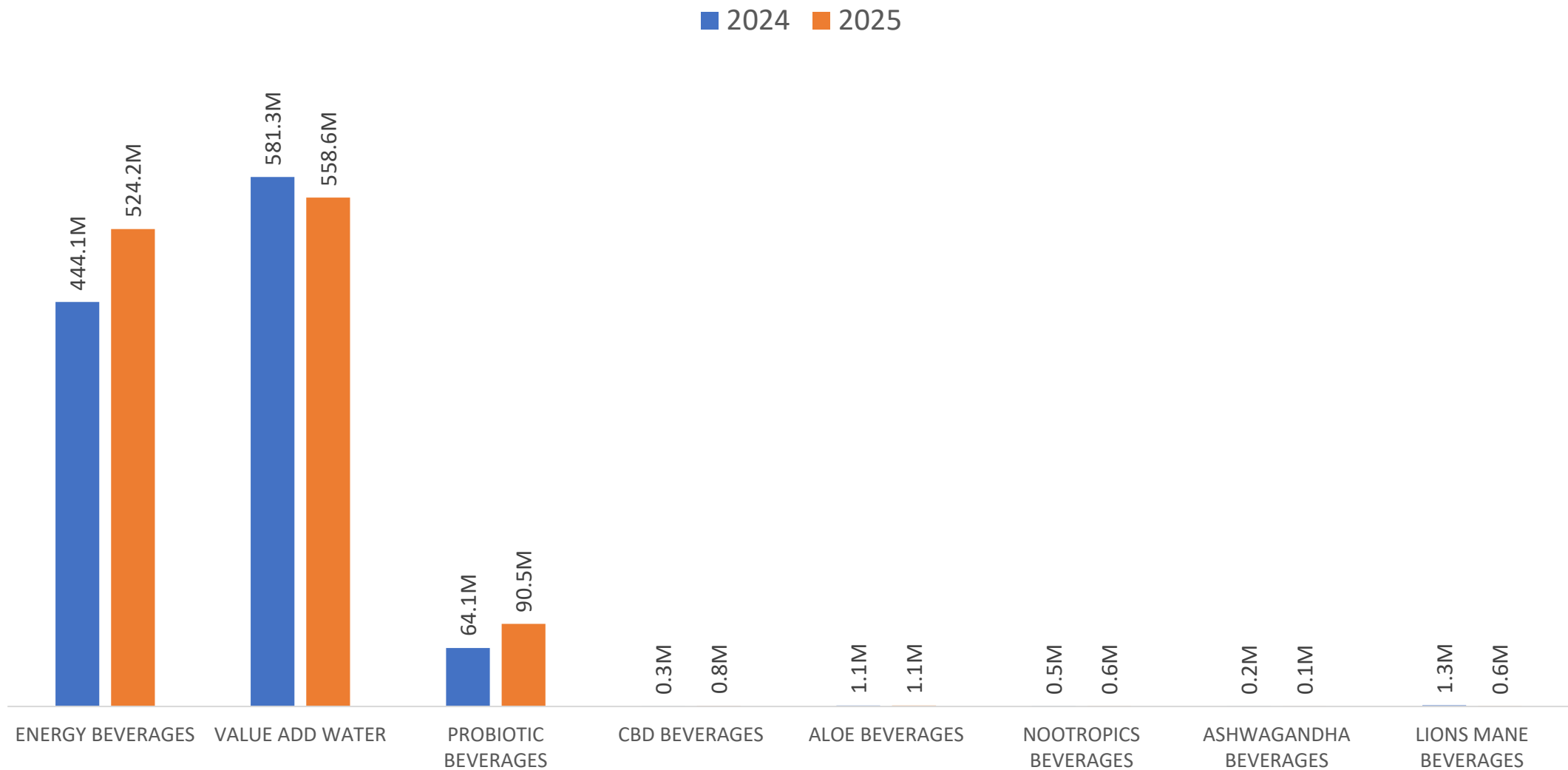
Source: Nielsen Homescan data for Y/E Dec 2025

Soft Drink –% Purchased on Any Perceived Deal



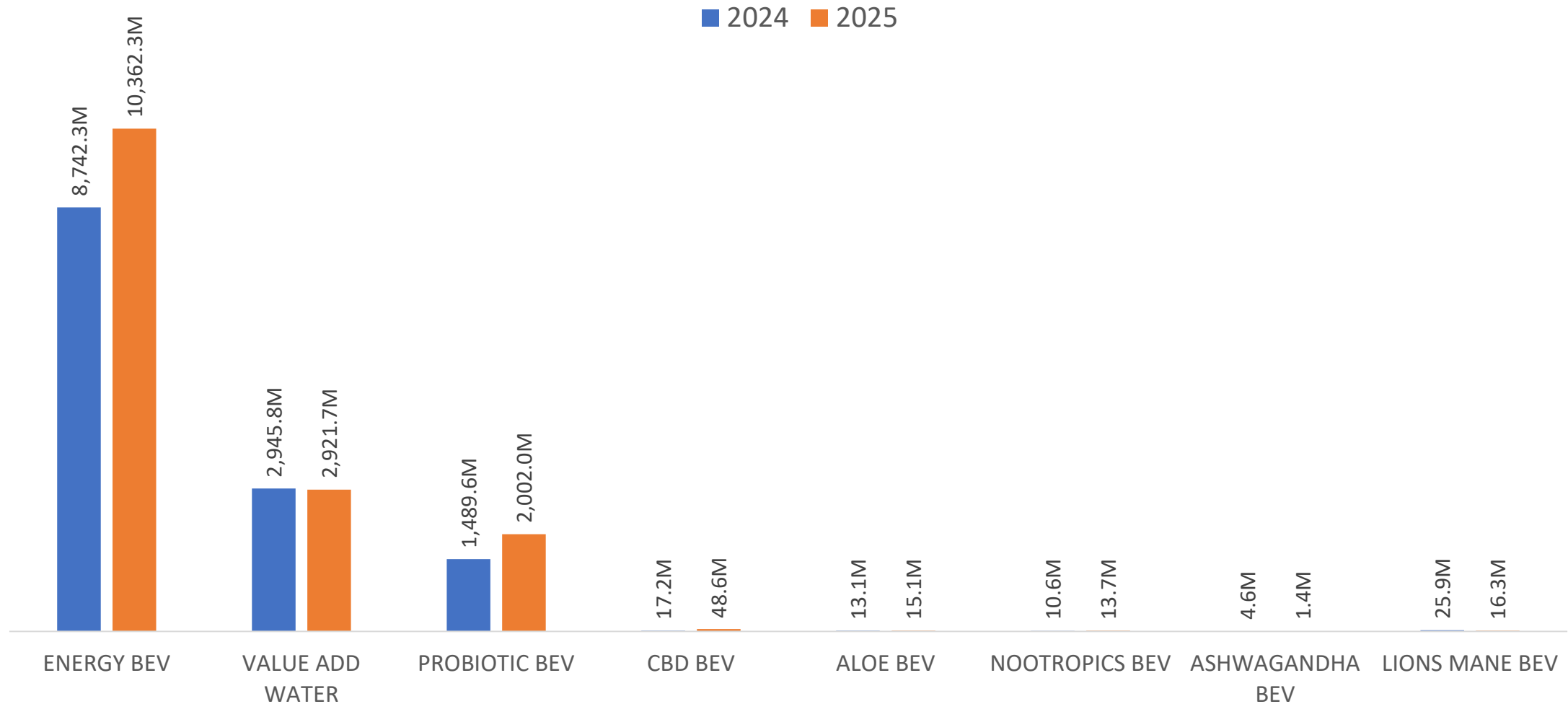
Source: Nielsen Homescan data for Y/E Dec 2025

Functional Bev –Volume Sales



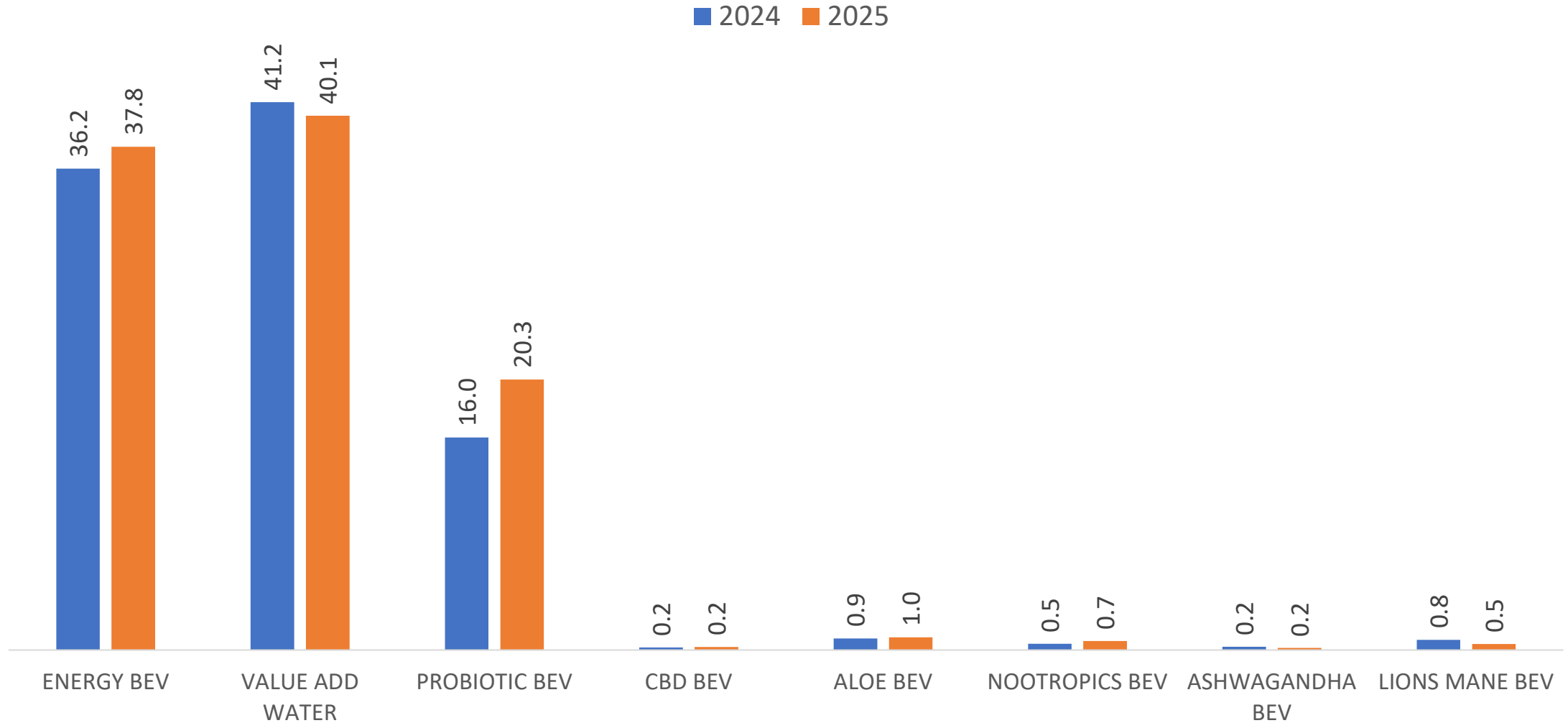
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Functional Bev –Dollar Sales



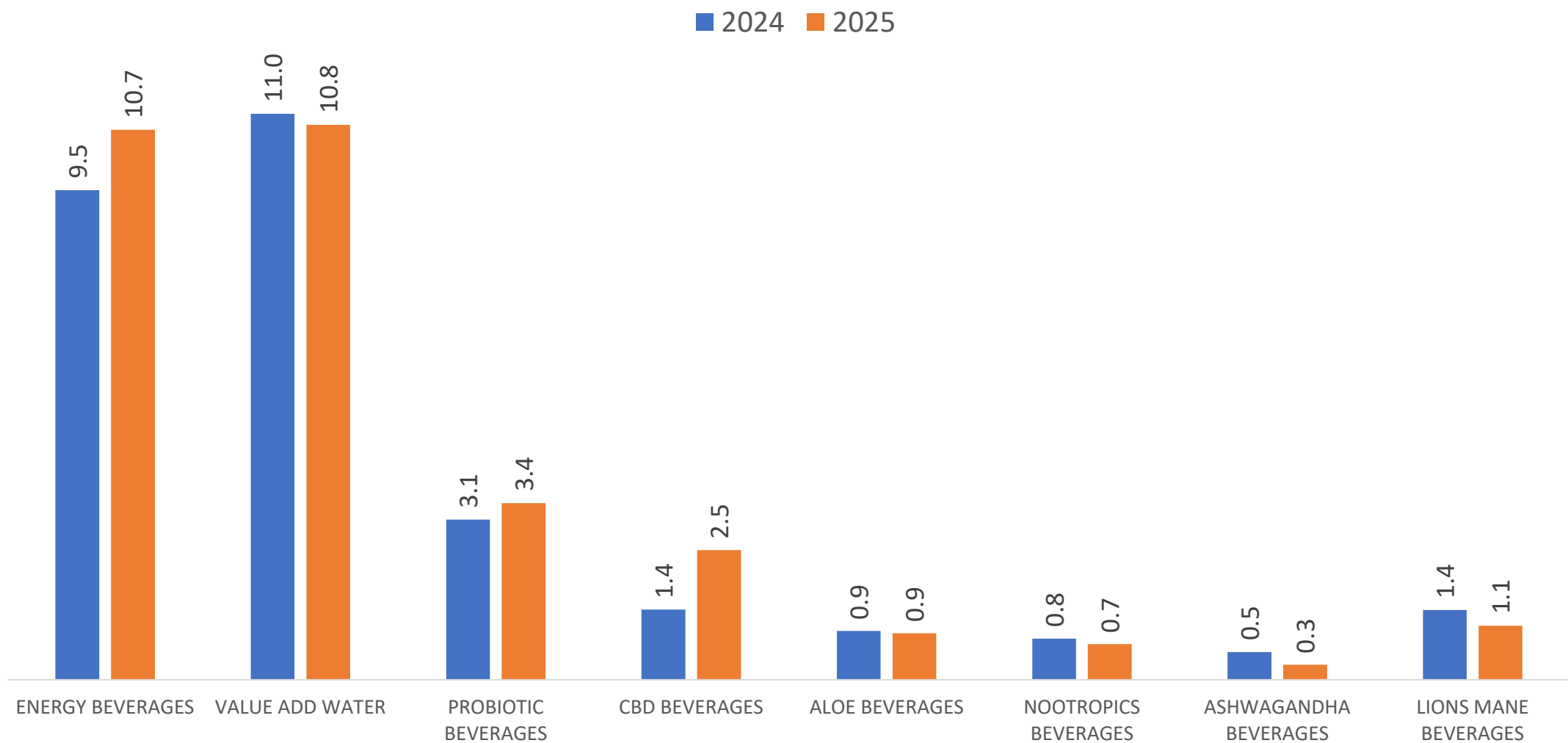
Source: Nielsen Homescan data for Y/E Dec 2025

Functional Bev –Penetration



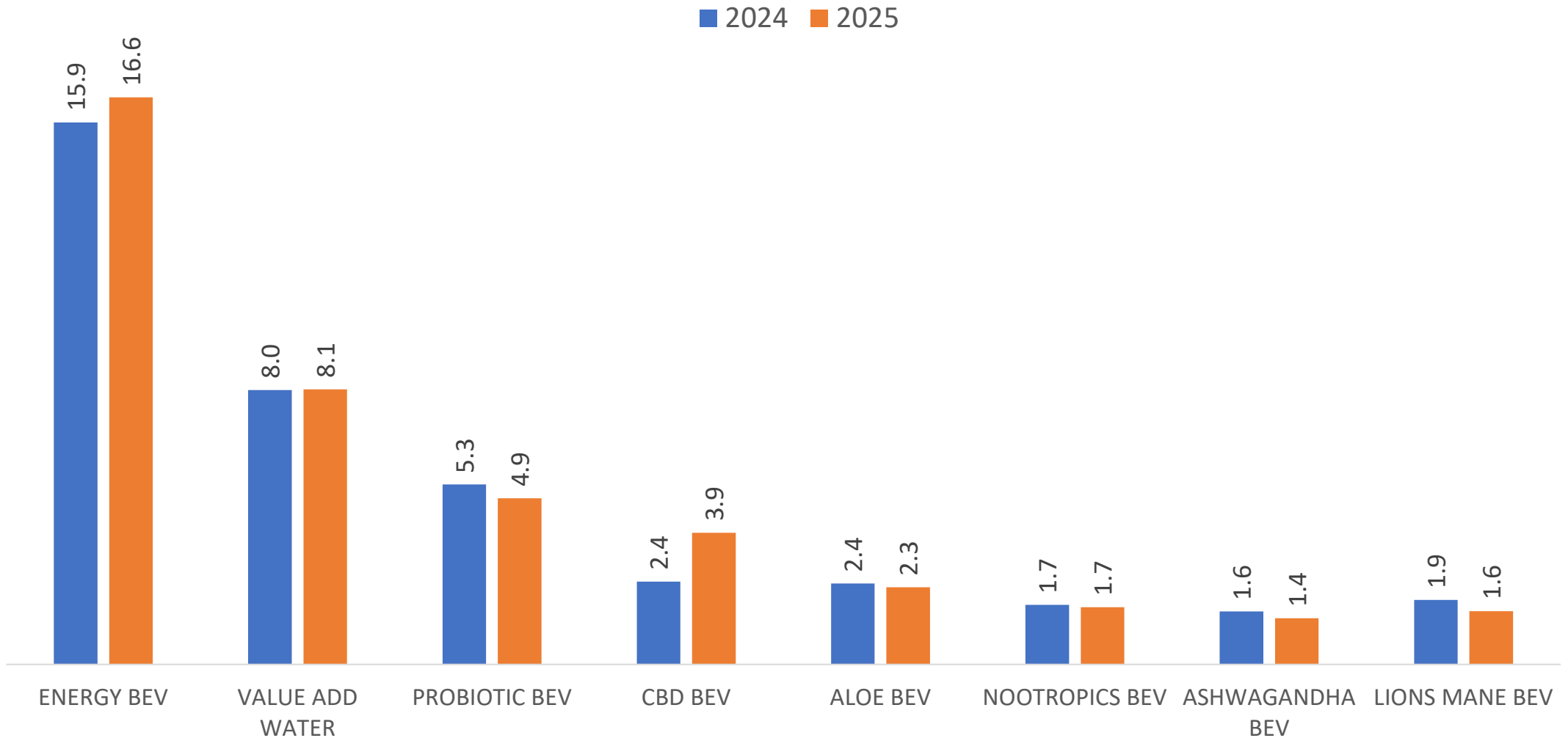
Source: Nielsen Homescan data for Y/E Dec 2025

Functional Bev –Buying Rate



Source: Nielsen Homescan data for Y/E Dec 2025

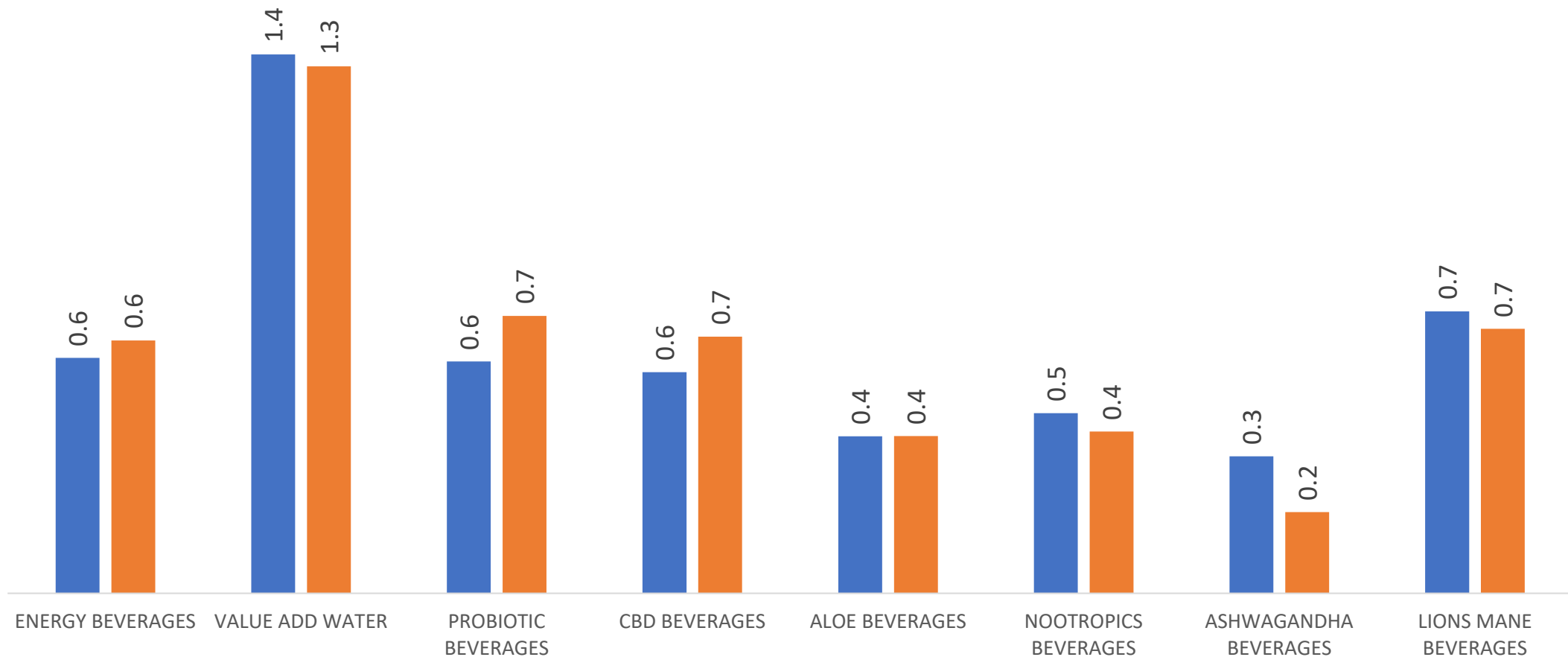
Functional Bev –Purchase Frequency



Source: Nielsen Homescan data for Y/E Dec 2025

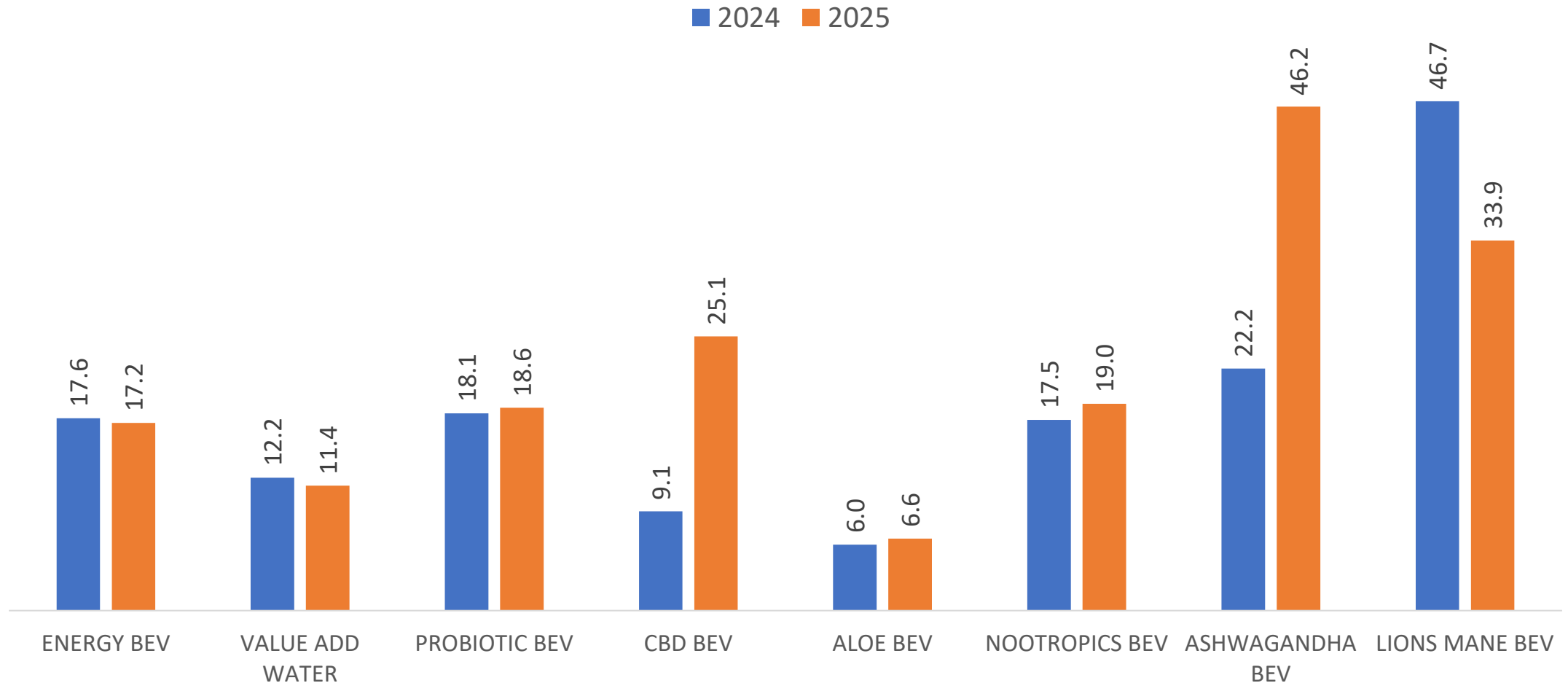
Functional Bev –Purchase Size

■ 2024 ■ 2025



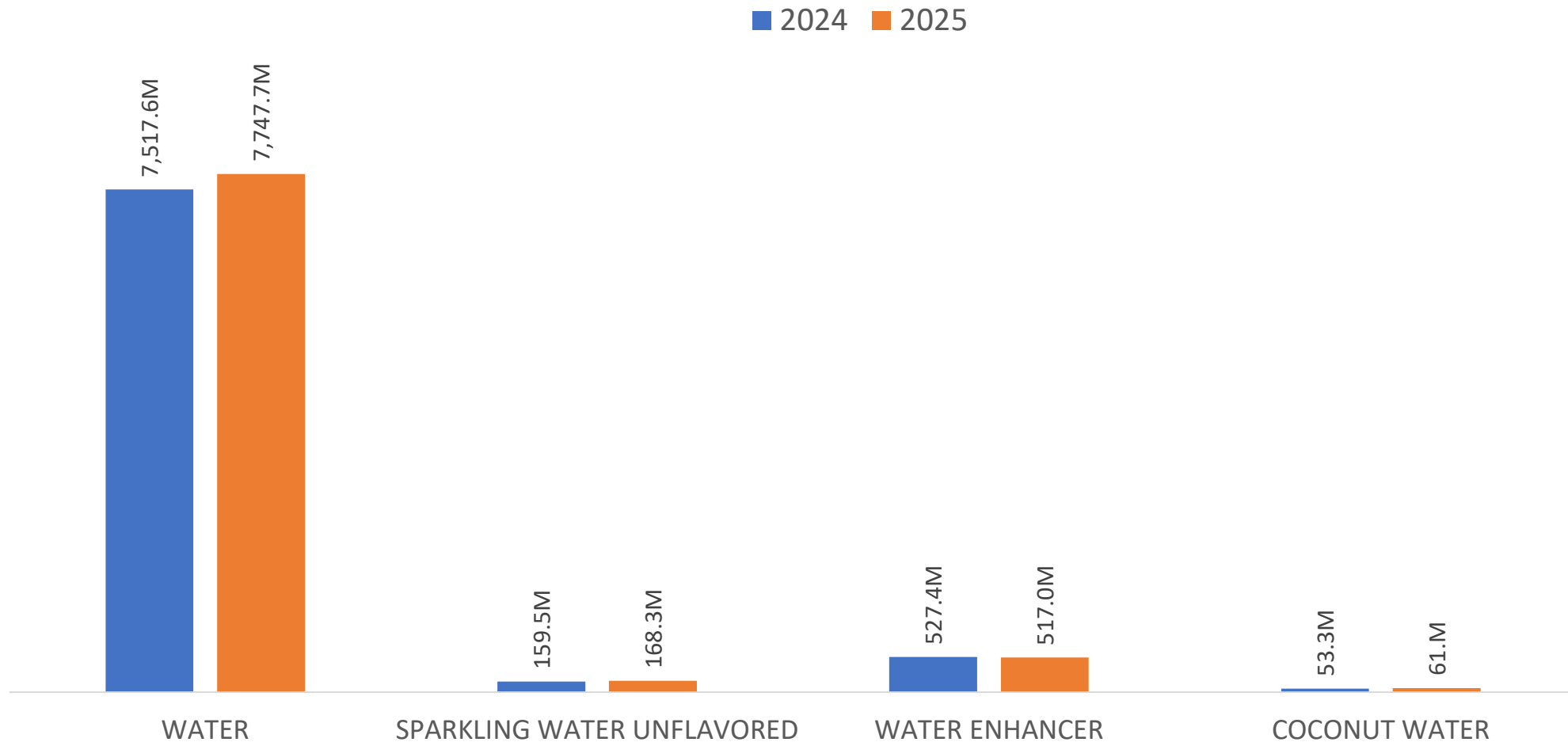
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Functional Bev –% Purchased on Any Perceived Deal



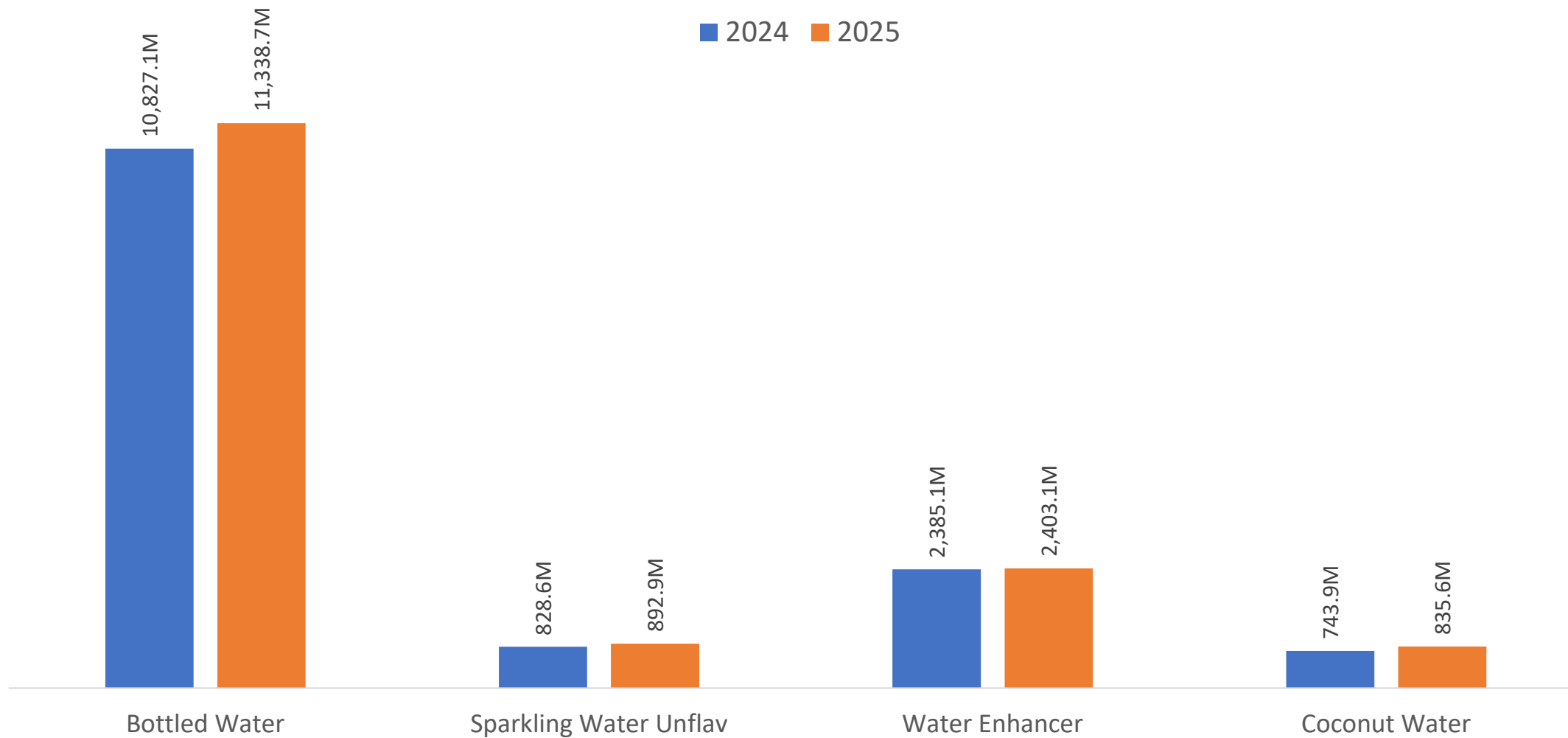
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Water –Volume Sales



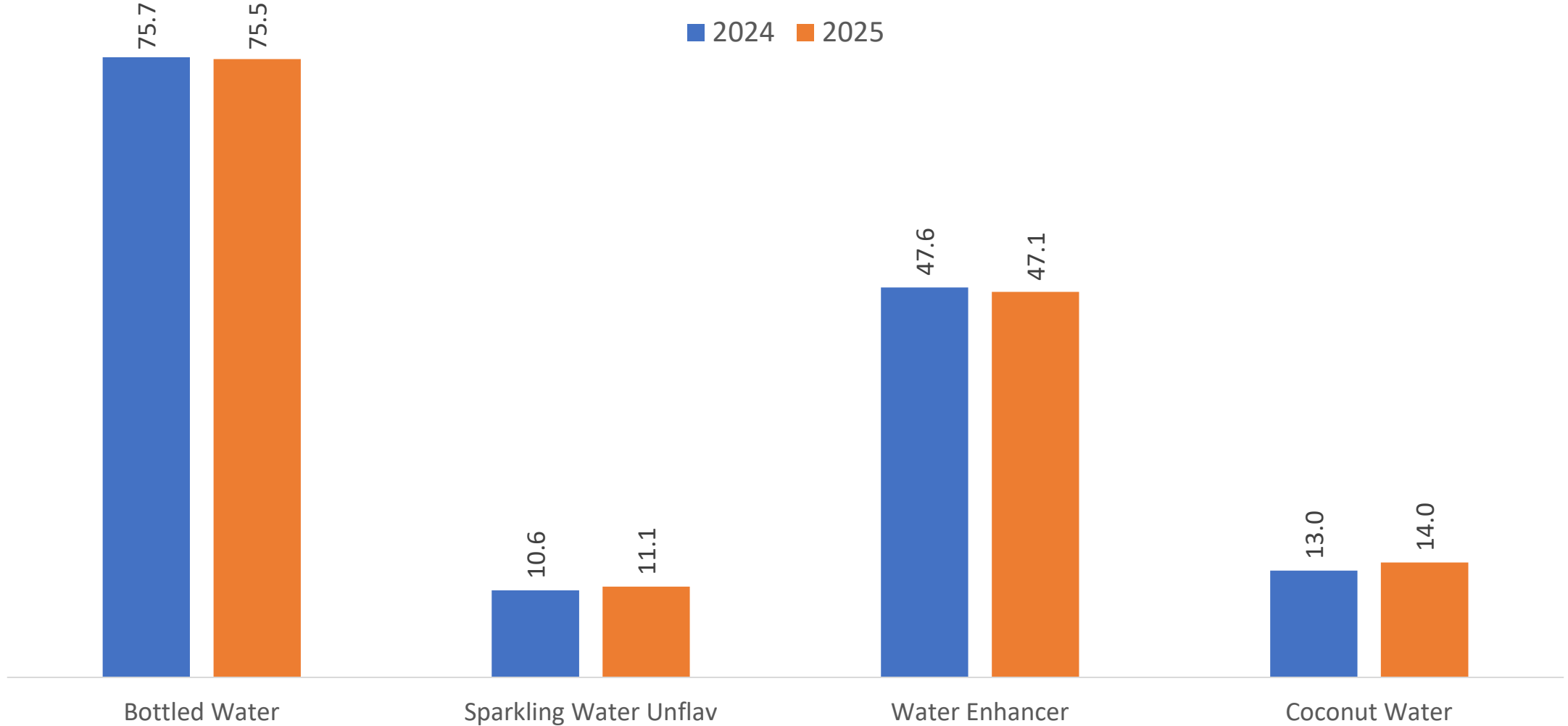
Source: Nielsen Homescan data for Y/E Dec 2025

Water –Dollar Sales



Source: Nielsen Homescan data for Y/E Dec 2025

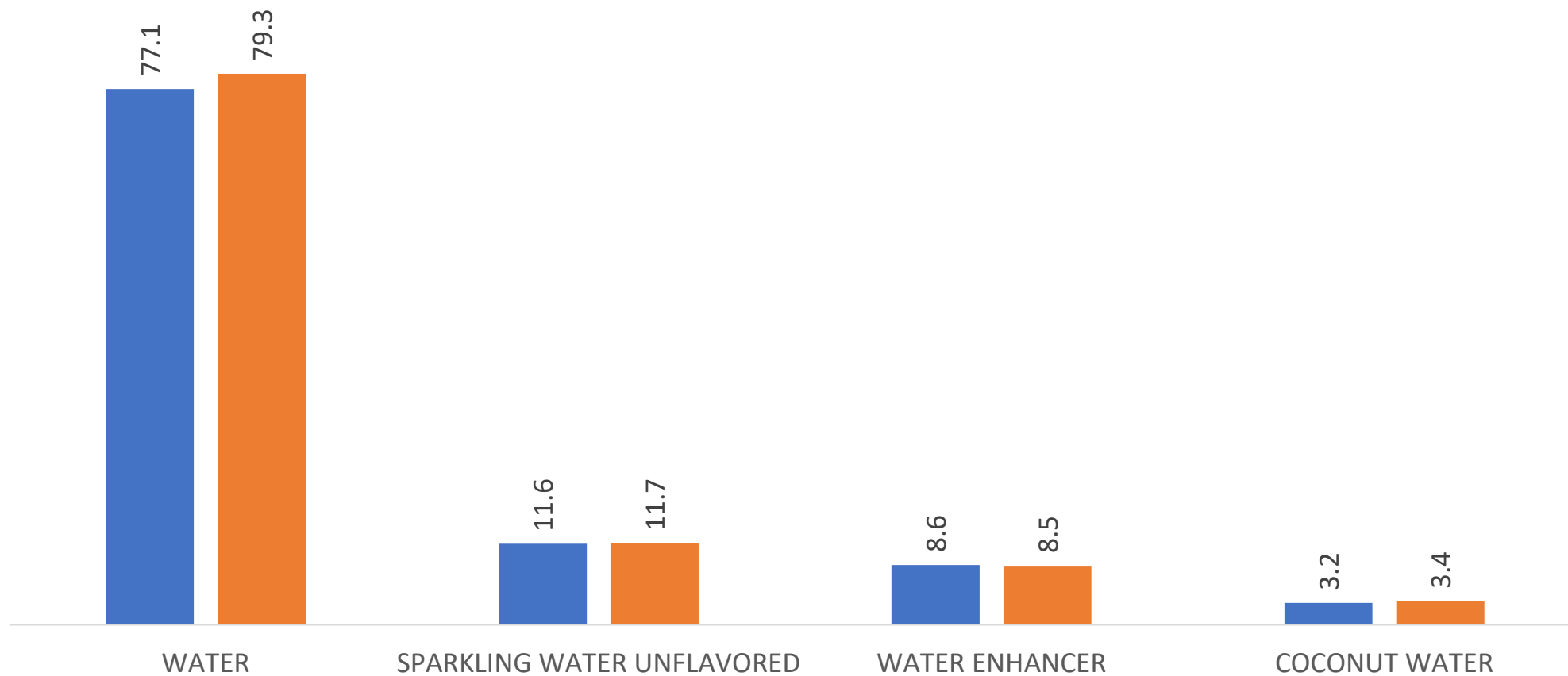
Water – Penetration



Source: Nielsen Homescan data for Y/E Dec 2025

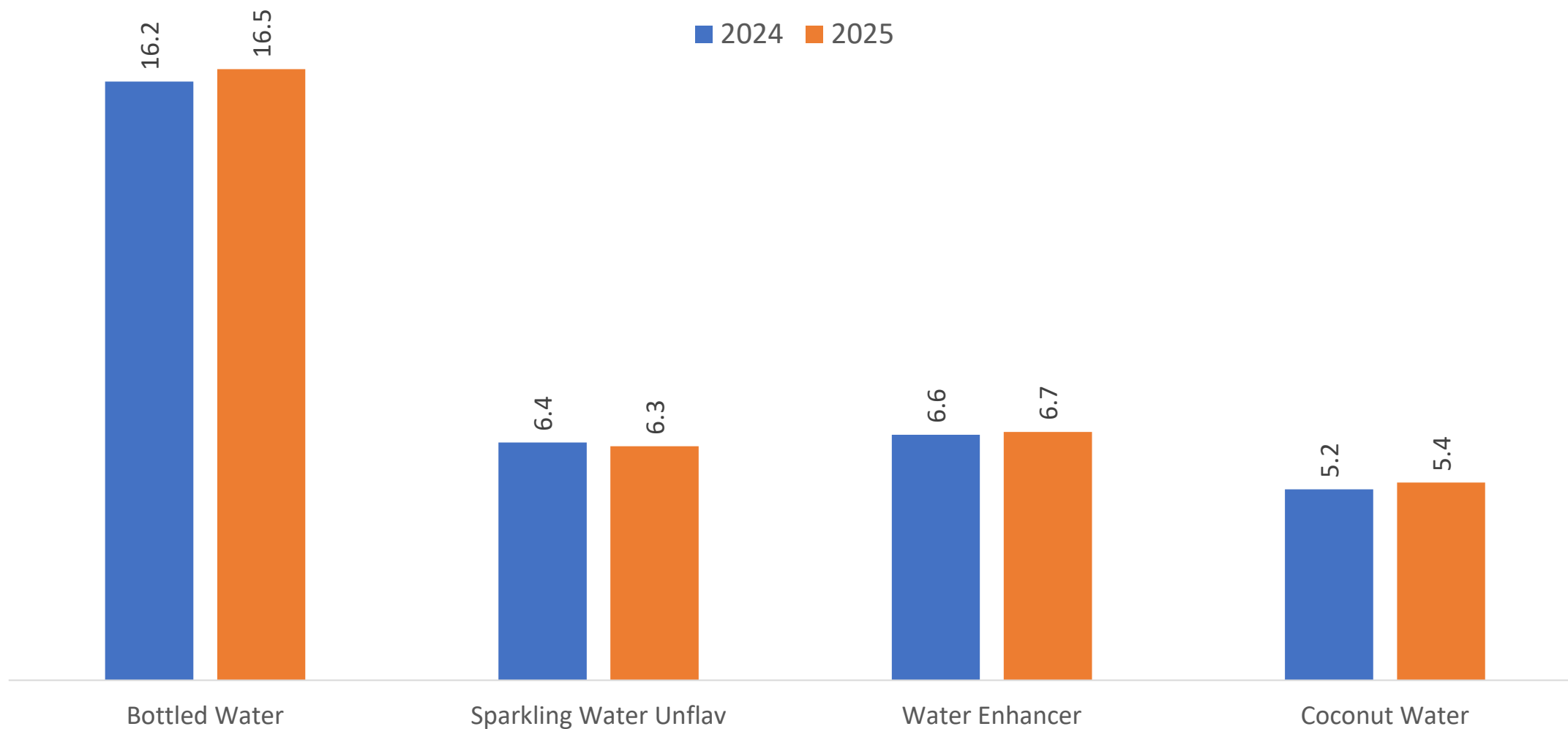
Water –Buying Rate

■ 2024 ■ 2025



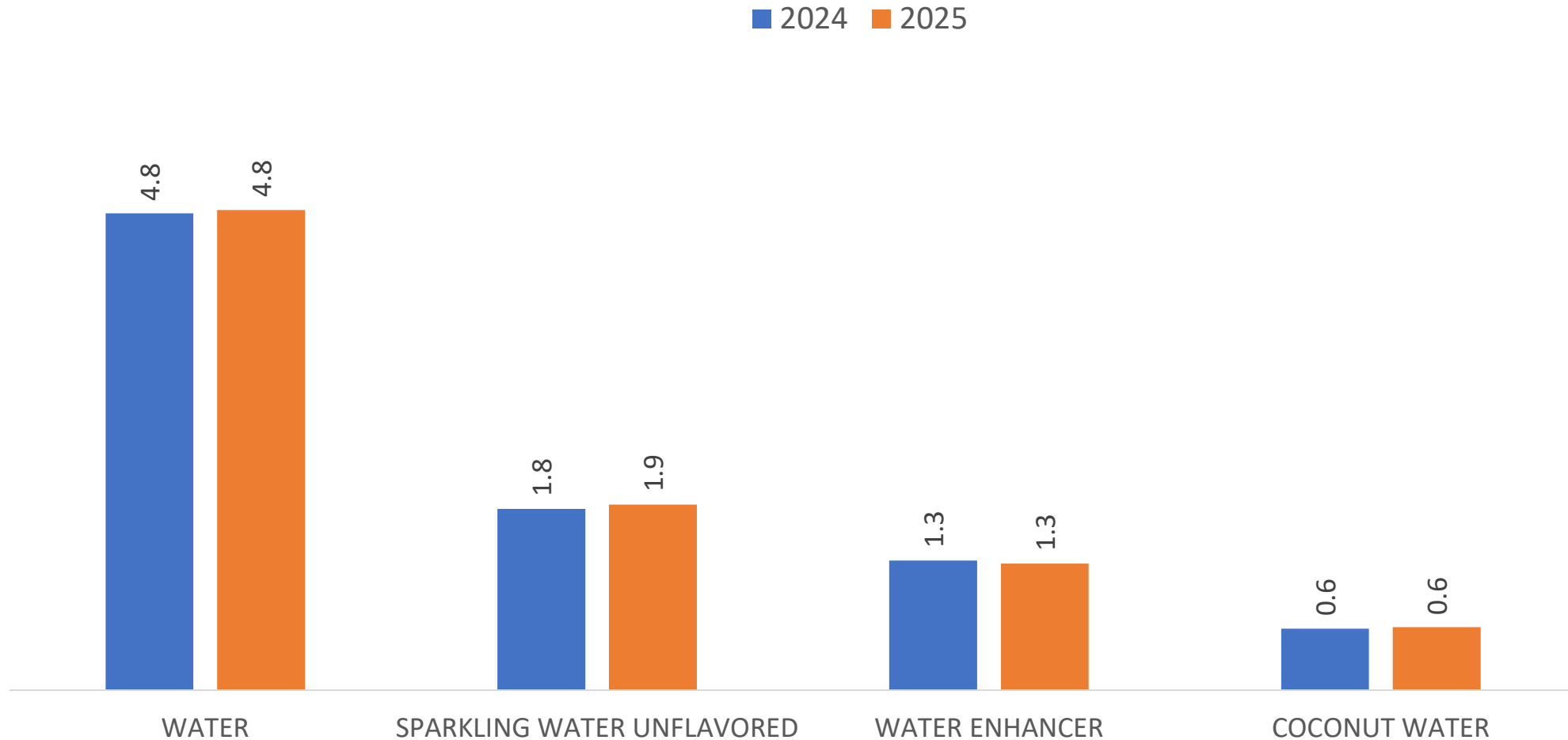
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Water –Purchase Frequency



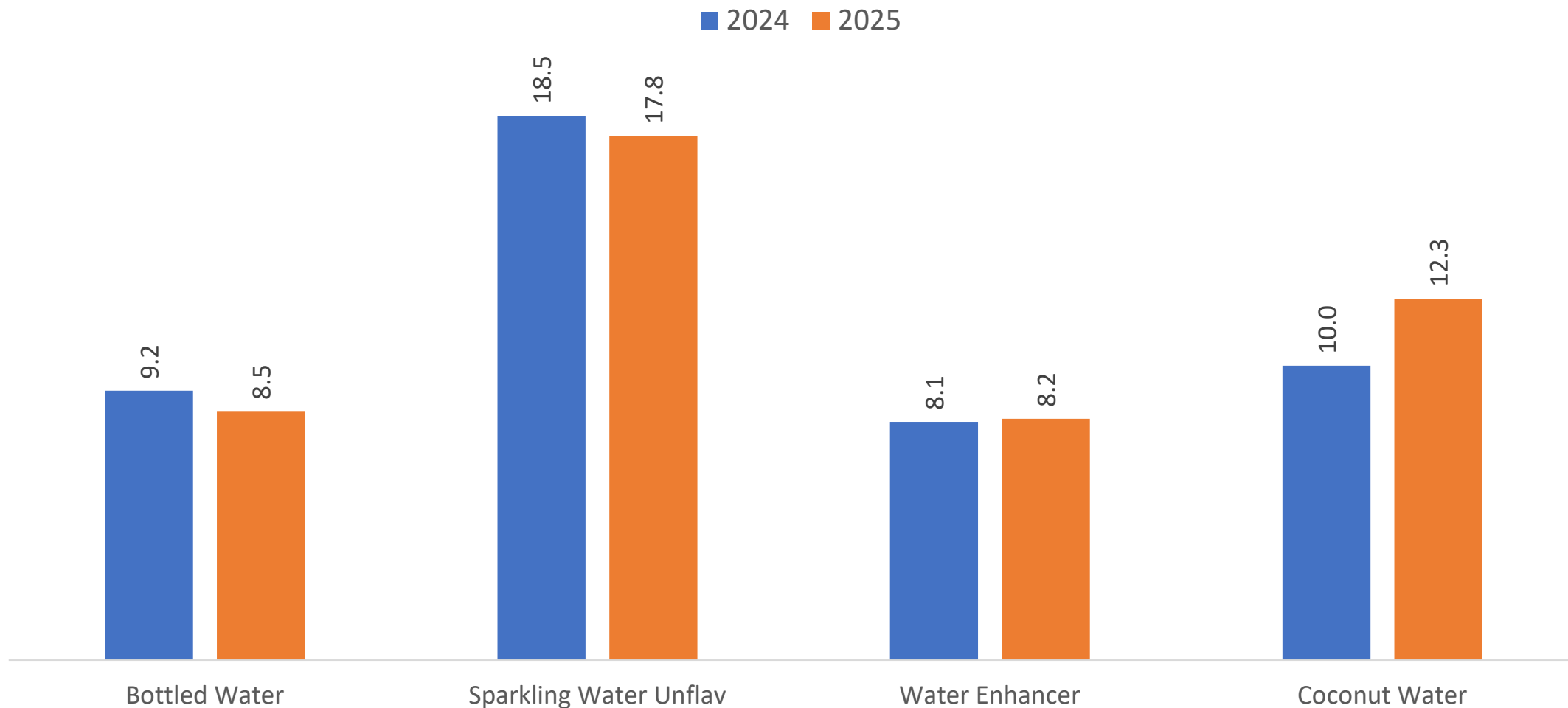
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Water –Purchase Size



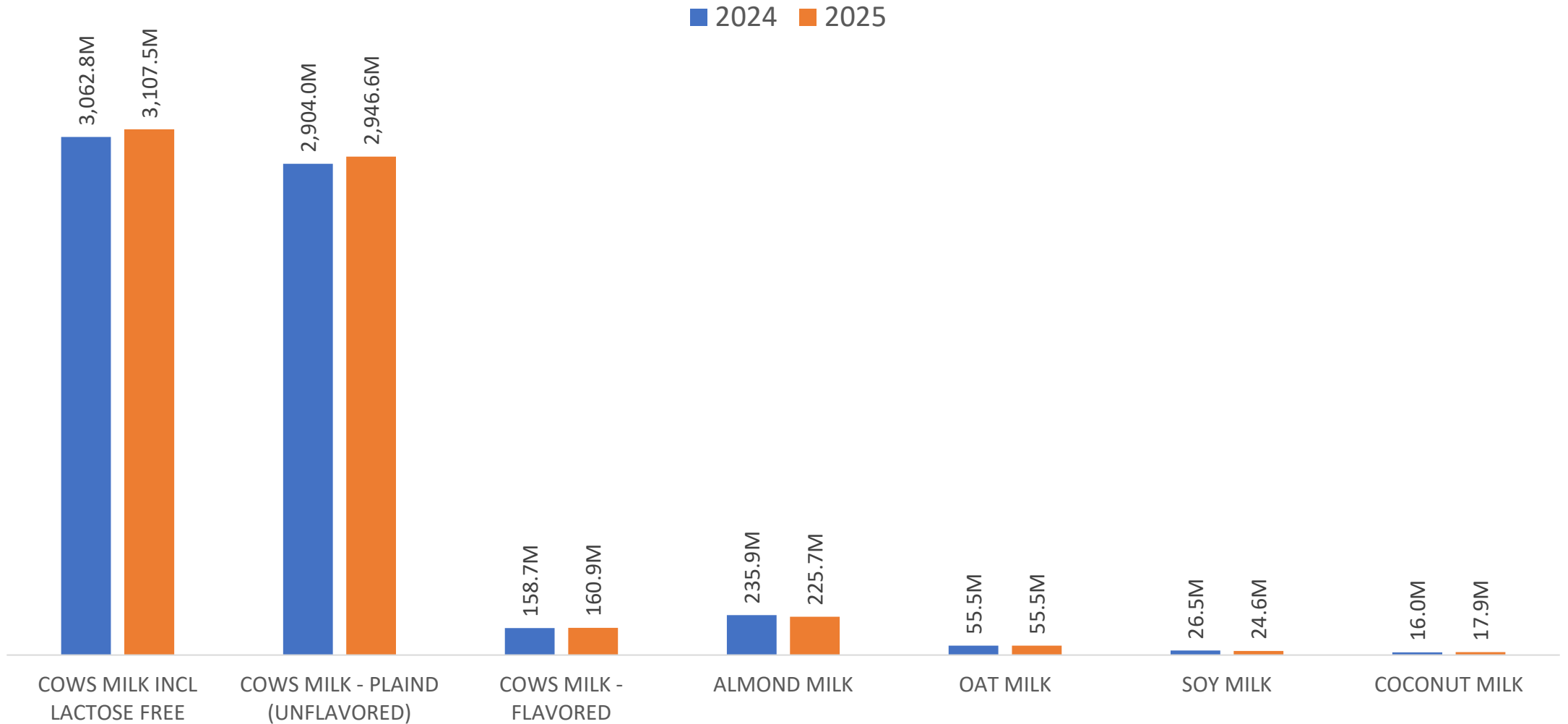
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Water –% Purchased on Any Perceived Deal



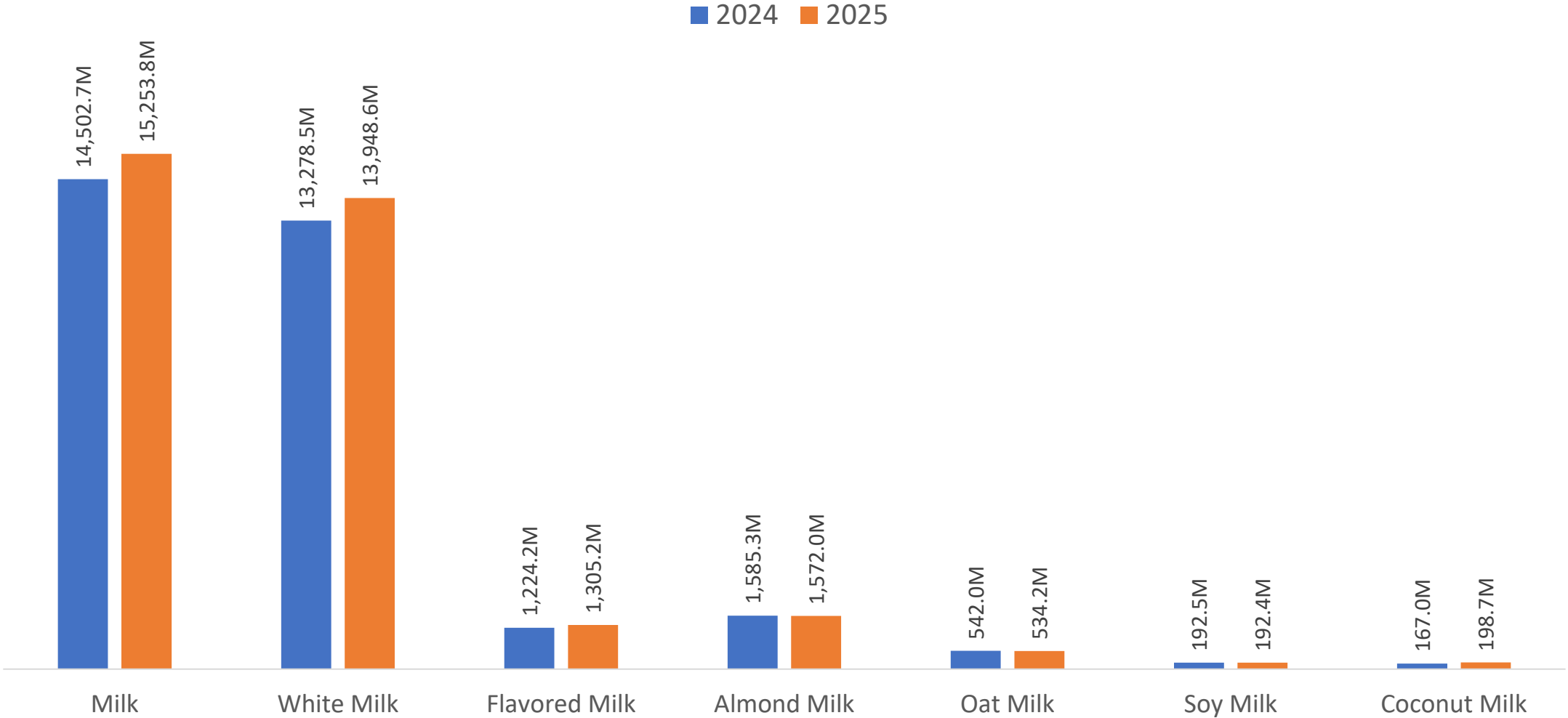
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Milk –Volume Sales



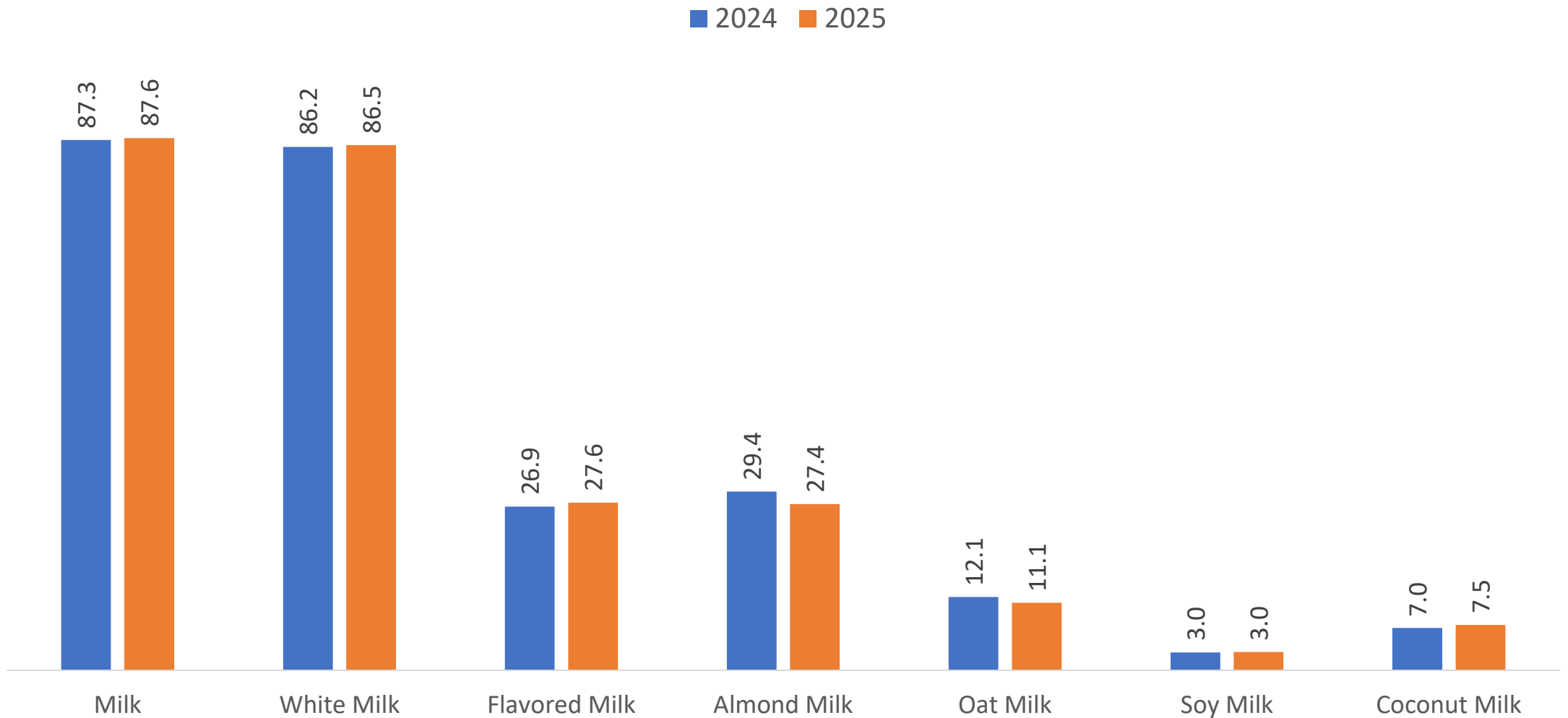
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Milk –Dollar Sales



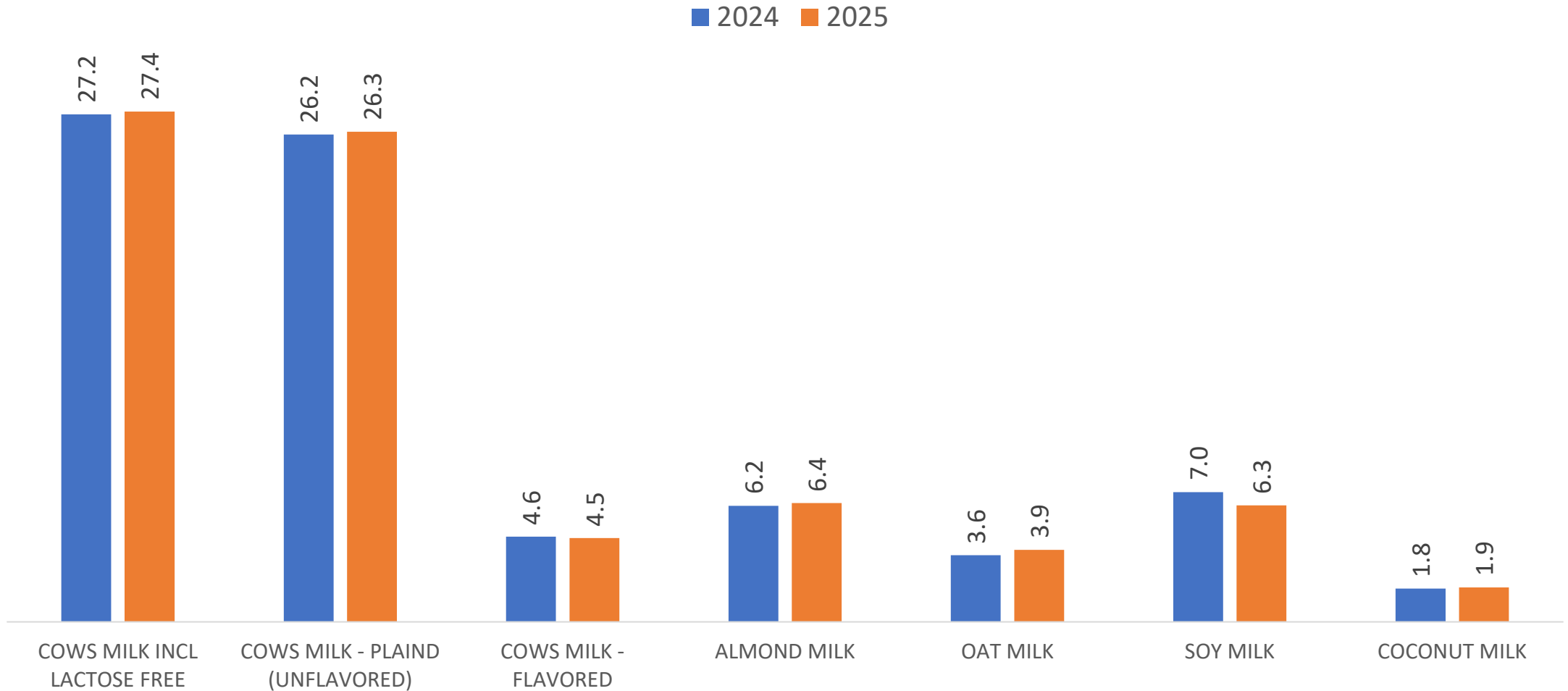
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Milk – Penetration



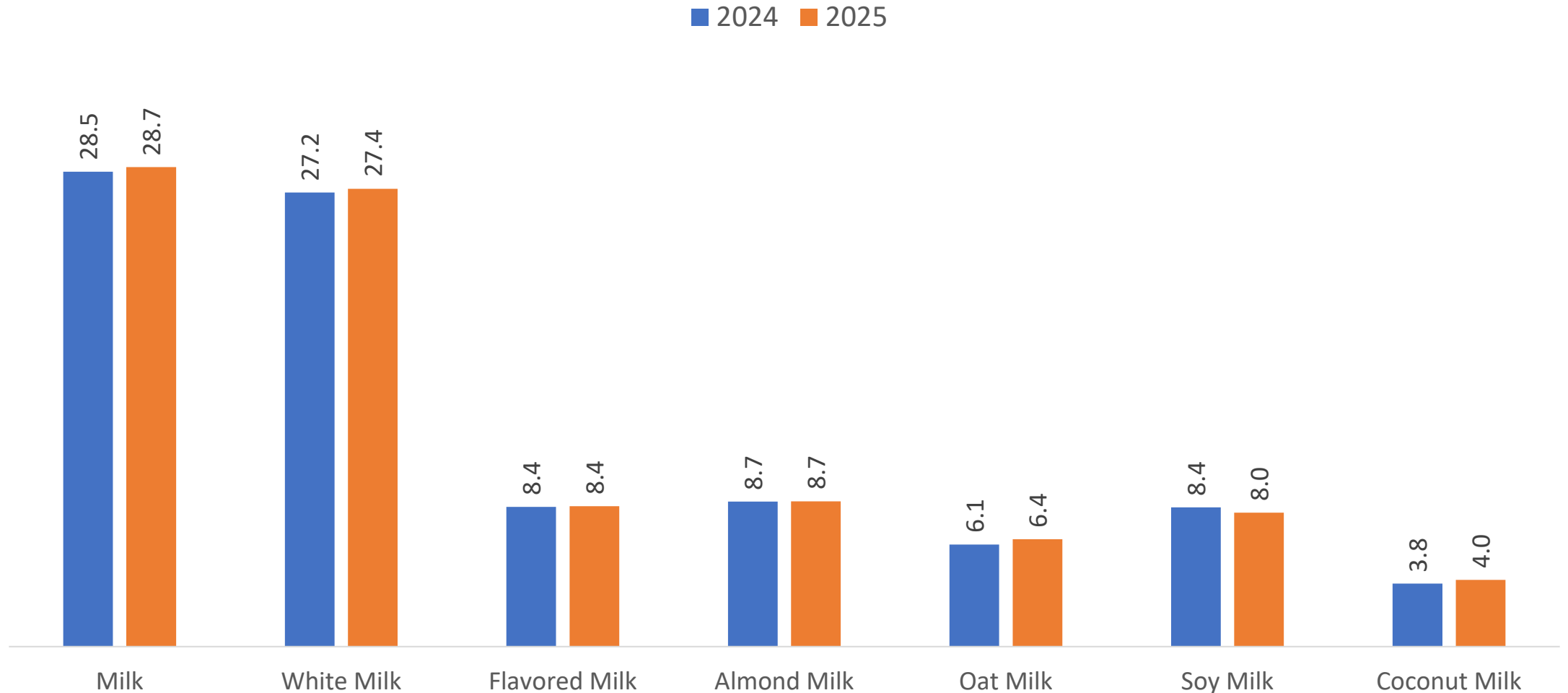
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Milk –Buying Rate



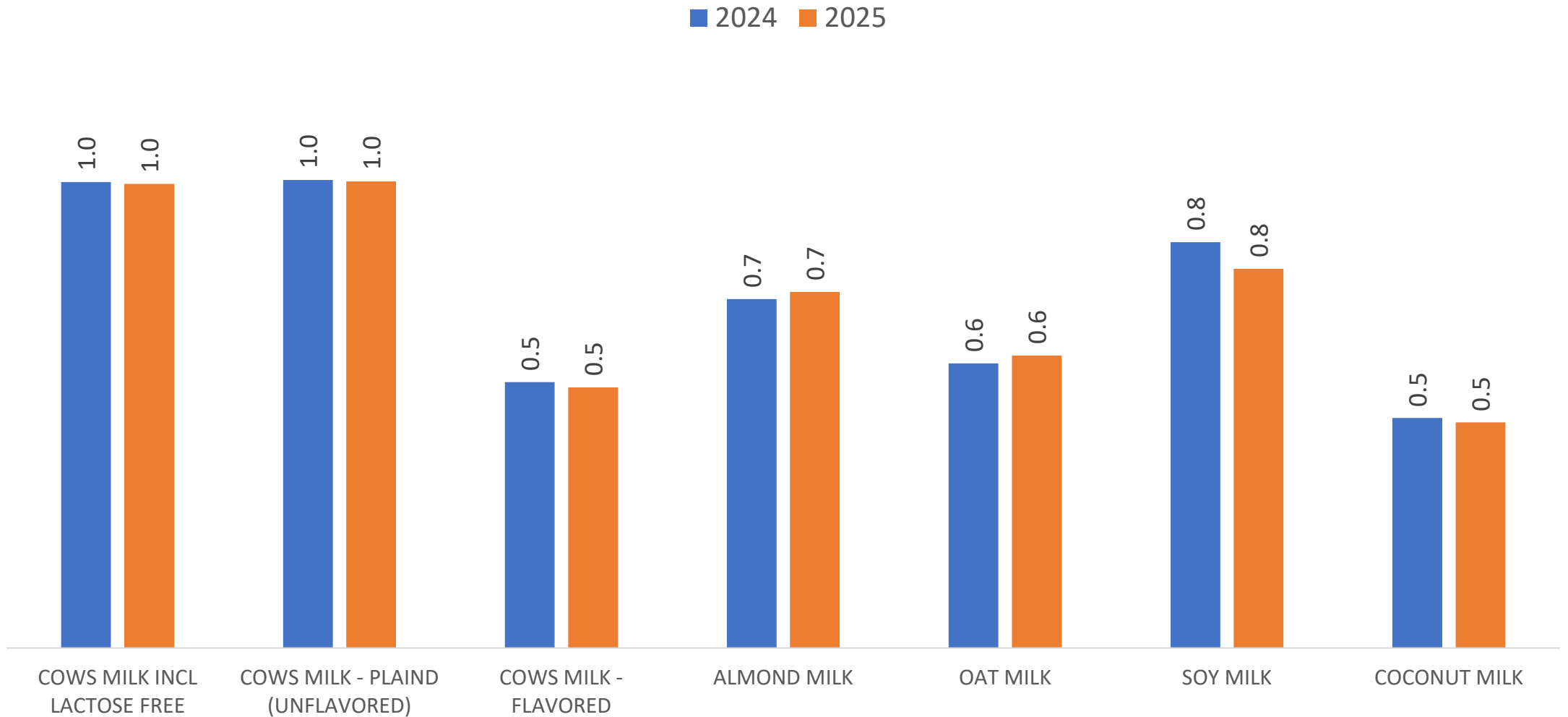
Source: Nielsen Homescan data for Y/E Dec 2025

Milk –Purchase Frequency



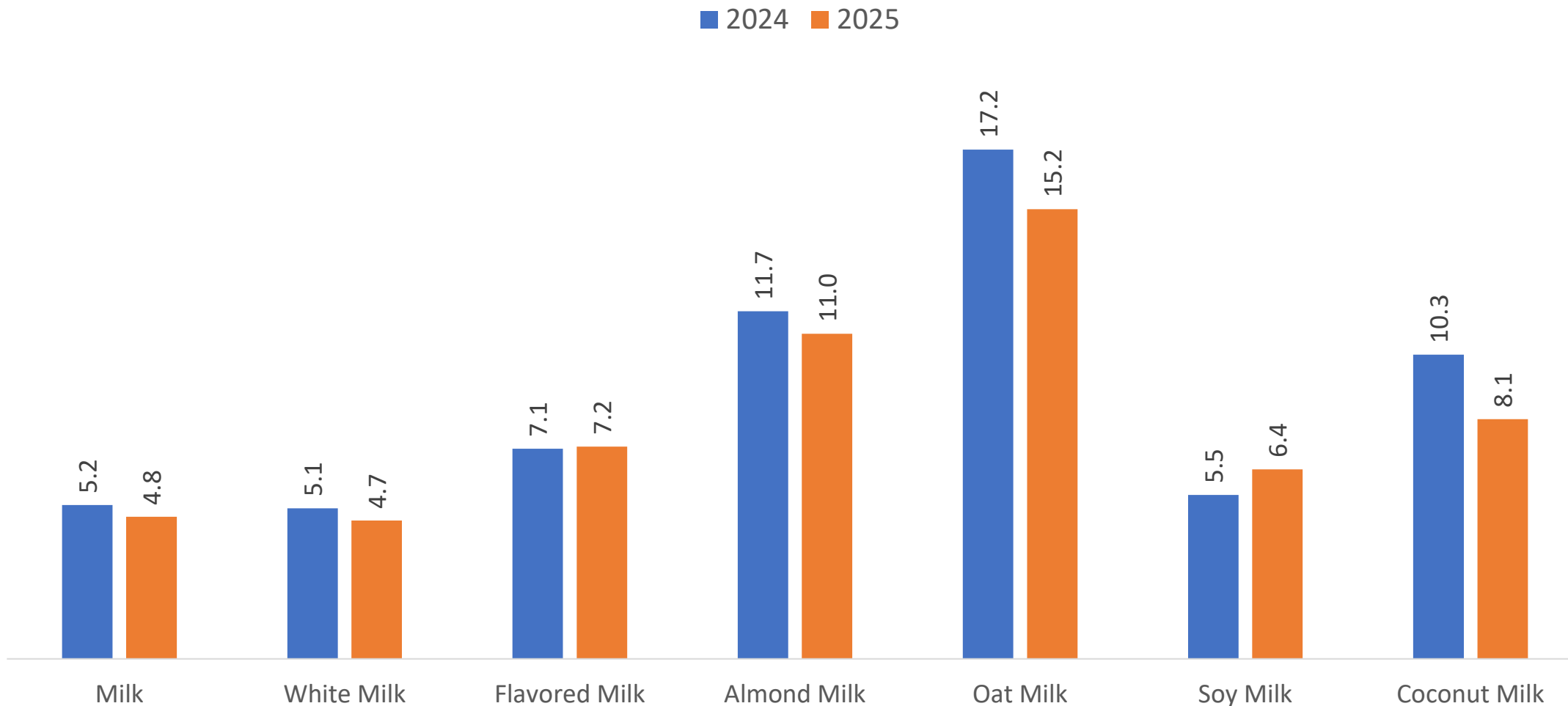
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Milk –Purchase Size



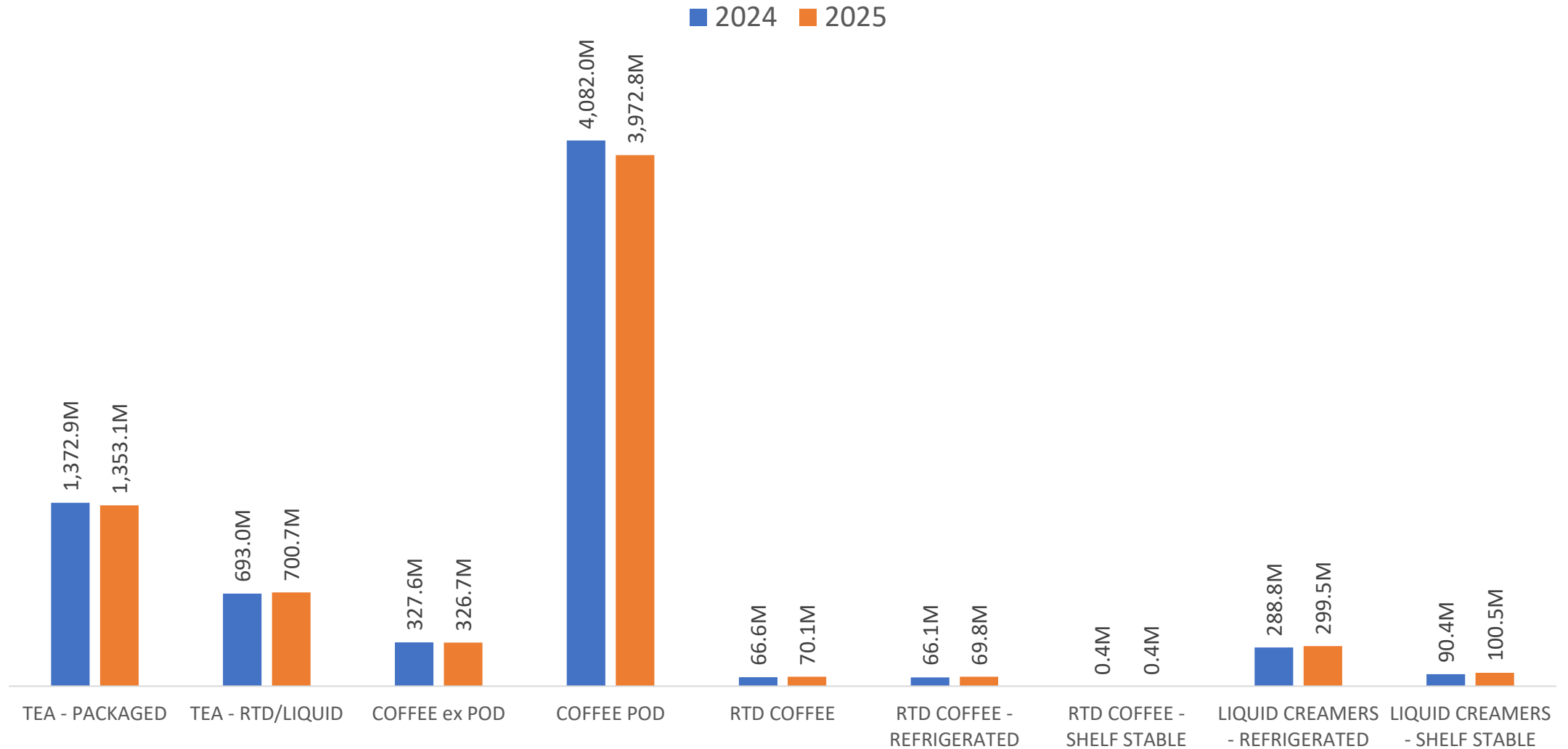
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Milk –% Purchased on Any Perceived Deal



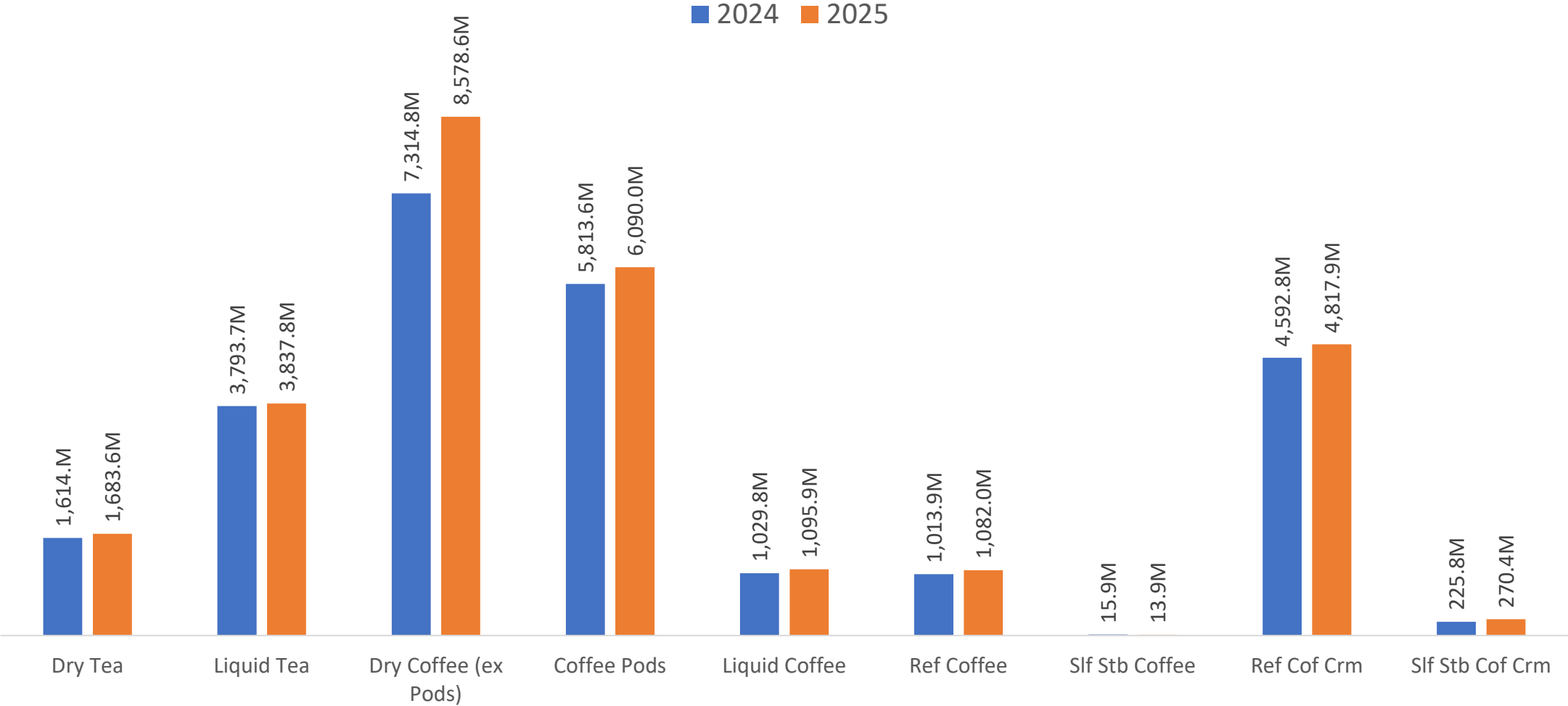
Source: Nielsen Homescan data for Y/E Dec 2025

Tea/Coffee –Volume Sales



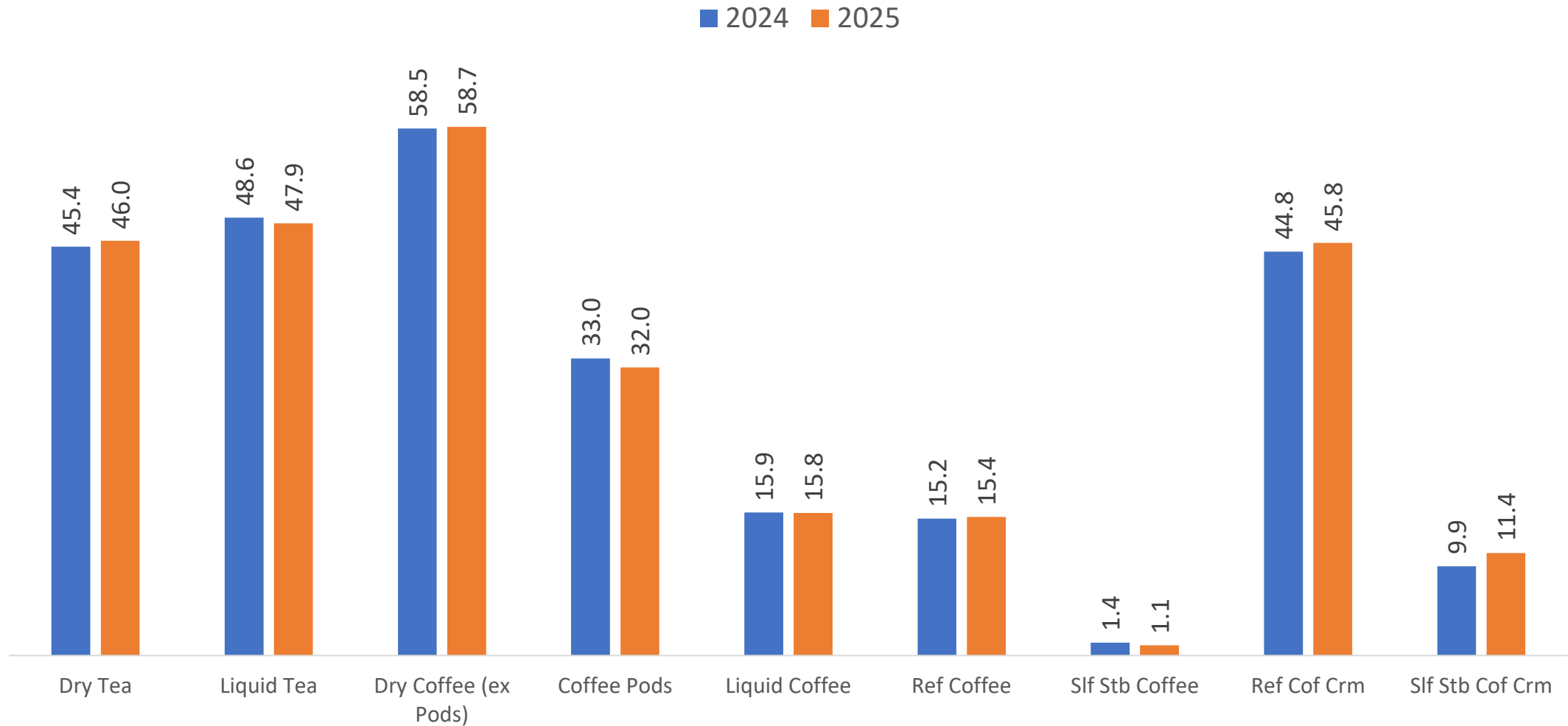
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Tea/Coffee –Dollar Sales



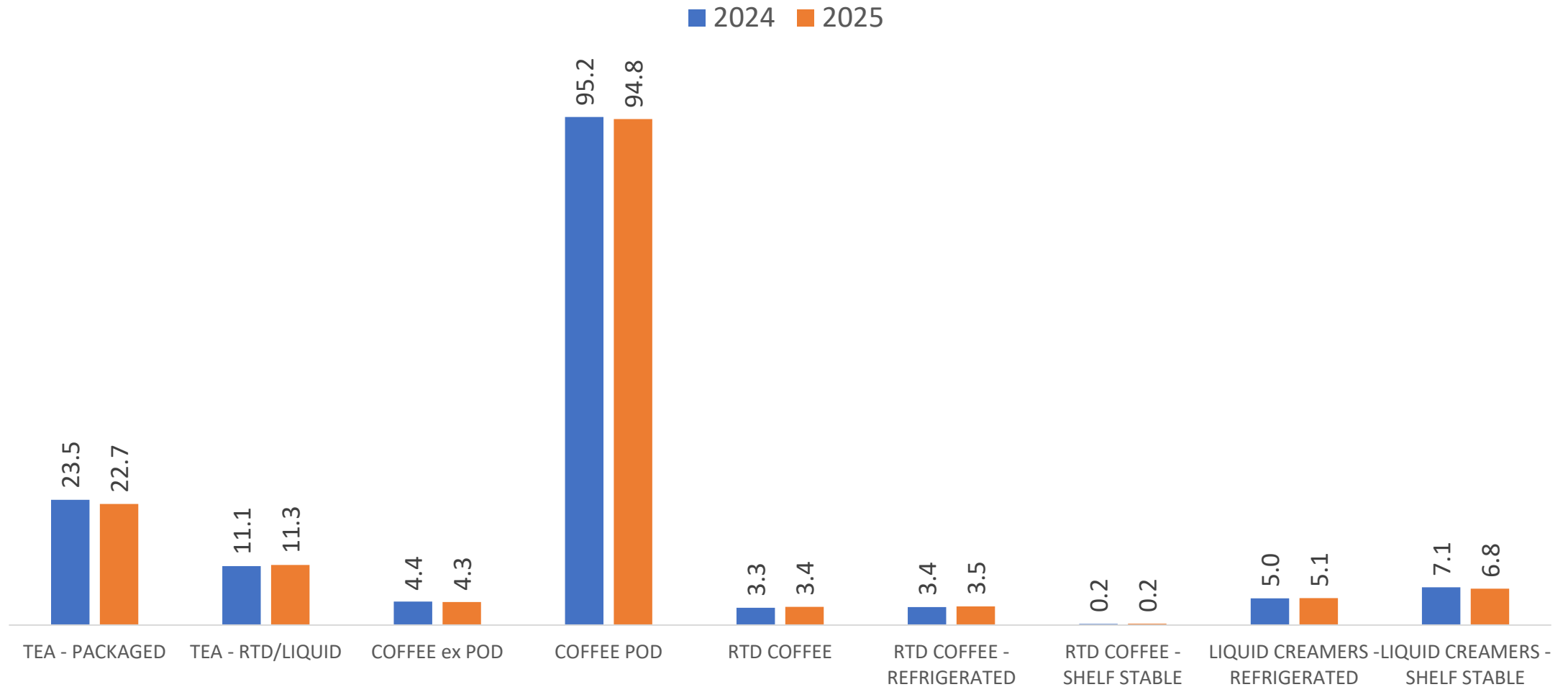
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Tea/Coffee –Penetration



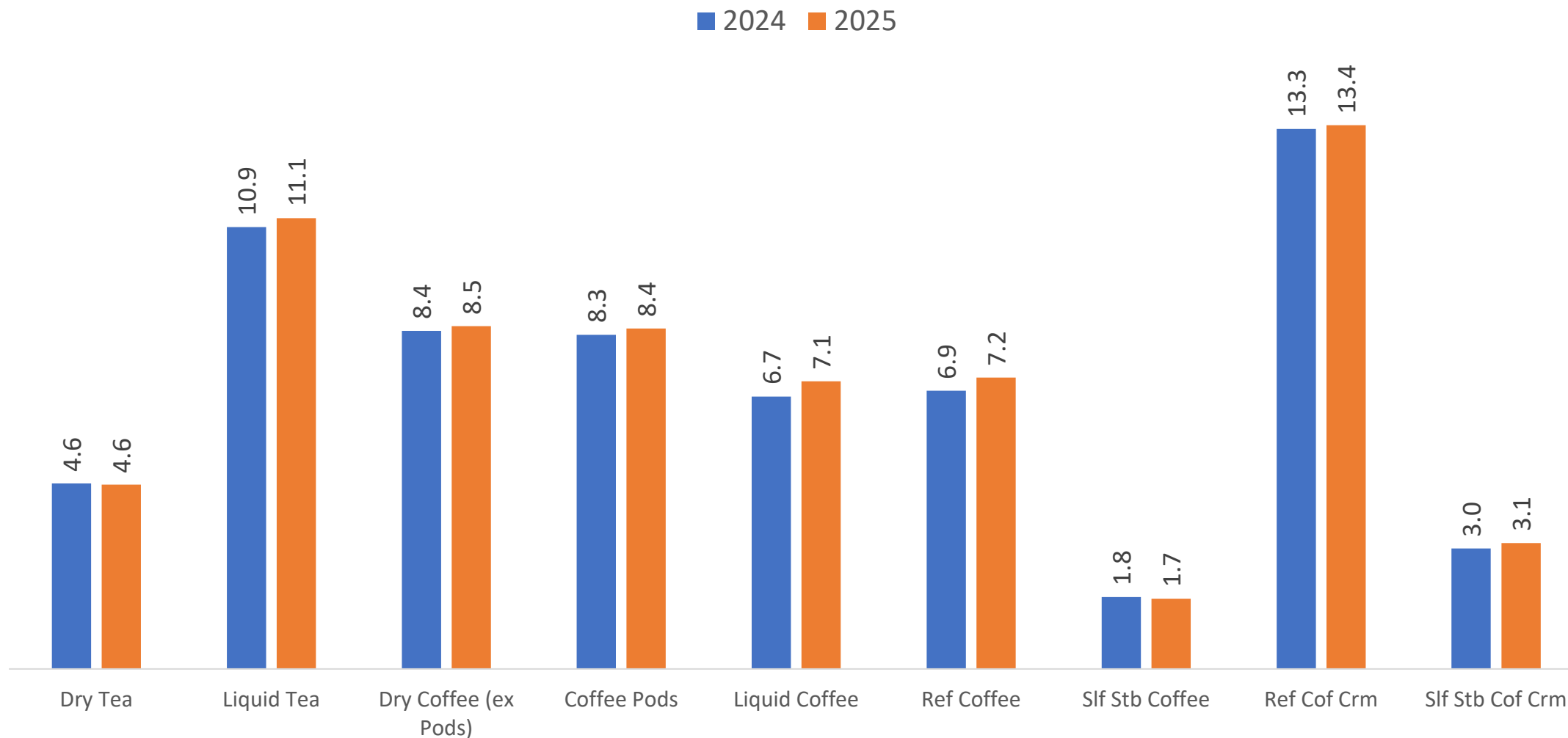
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Tea/Coffee –Buying Rate



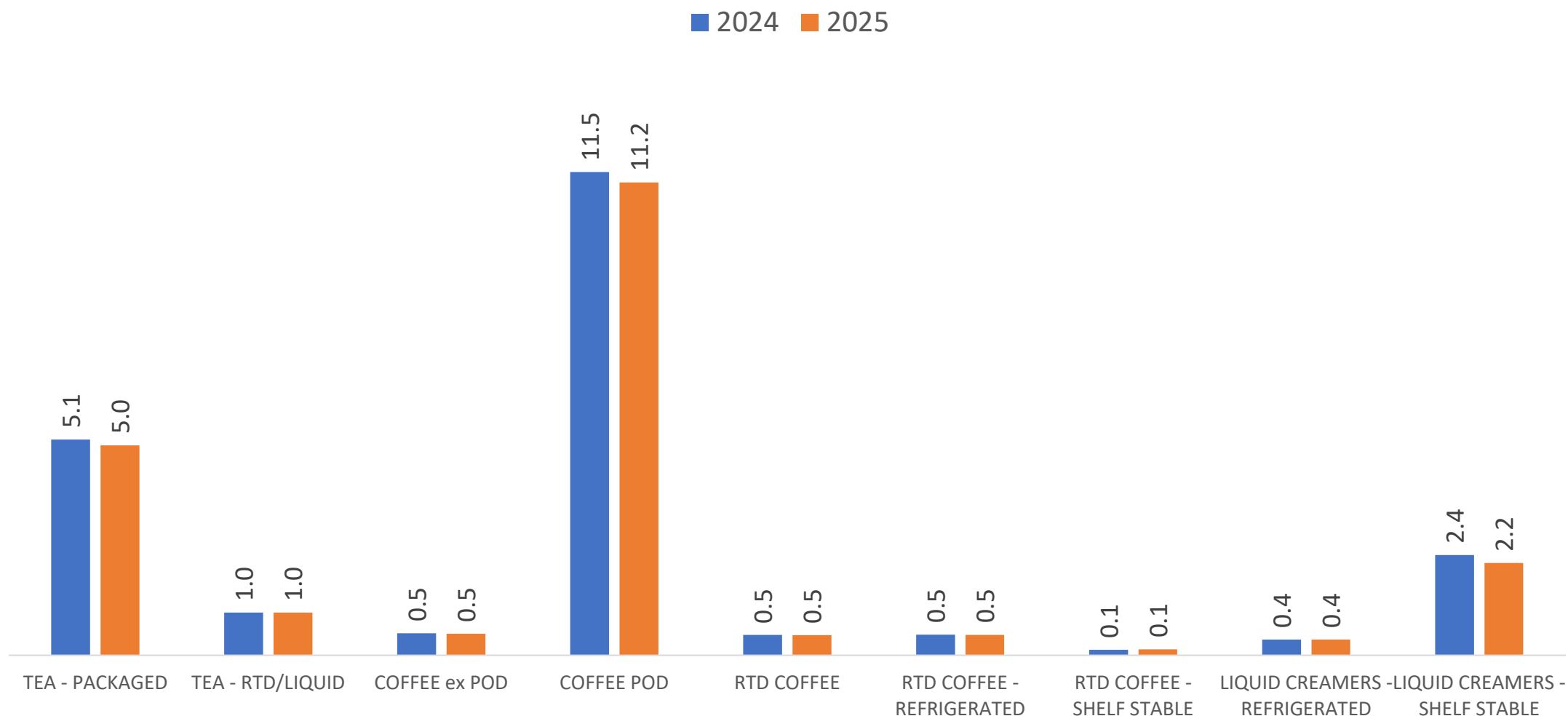
Source: Nielsen Homescan data for Y/E Dec 2025

Tea/Coffee –Purchase Frequency



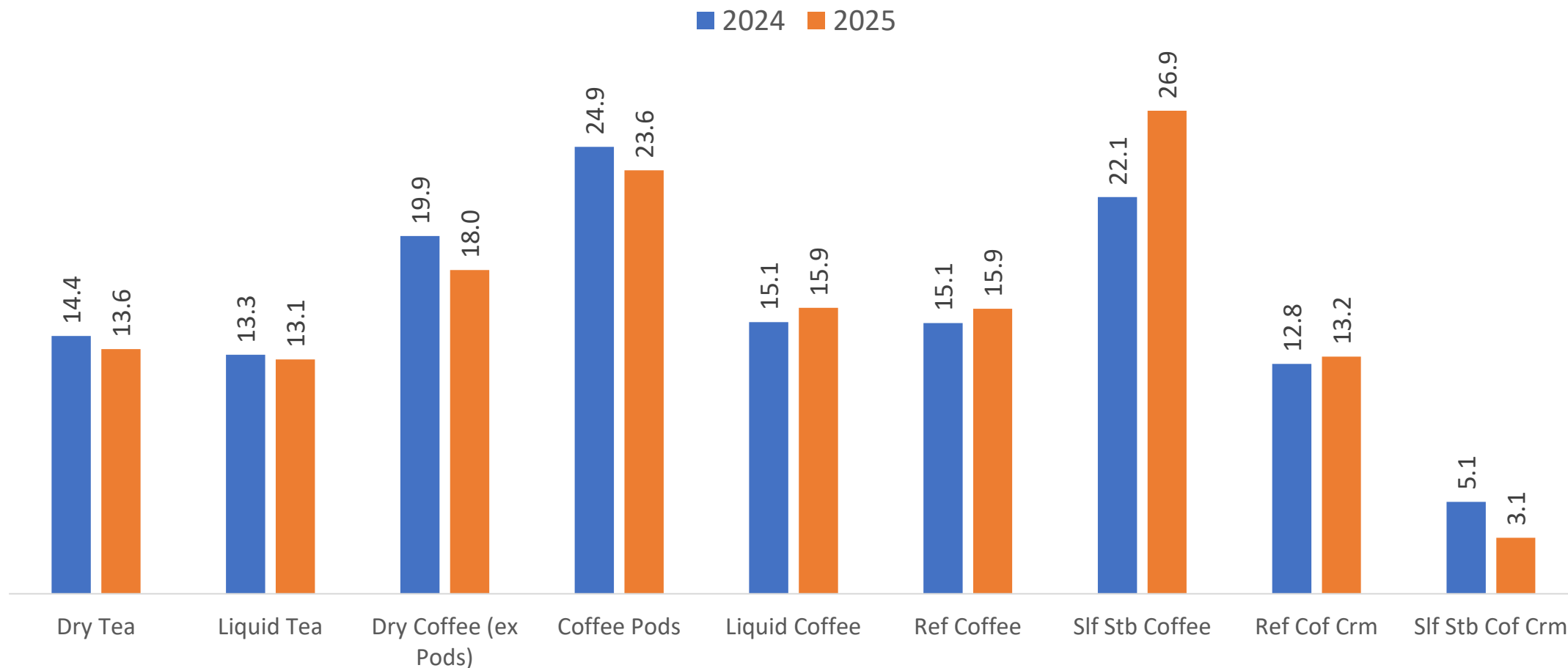
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Tea/Coffee –Purchase Size



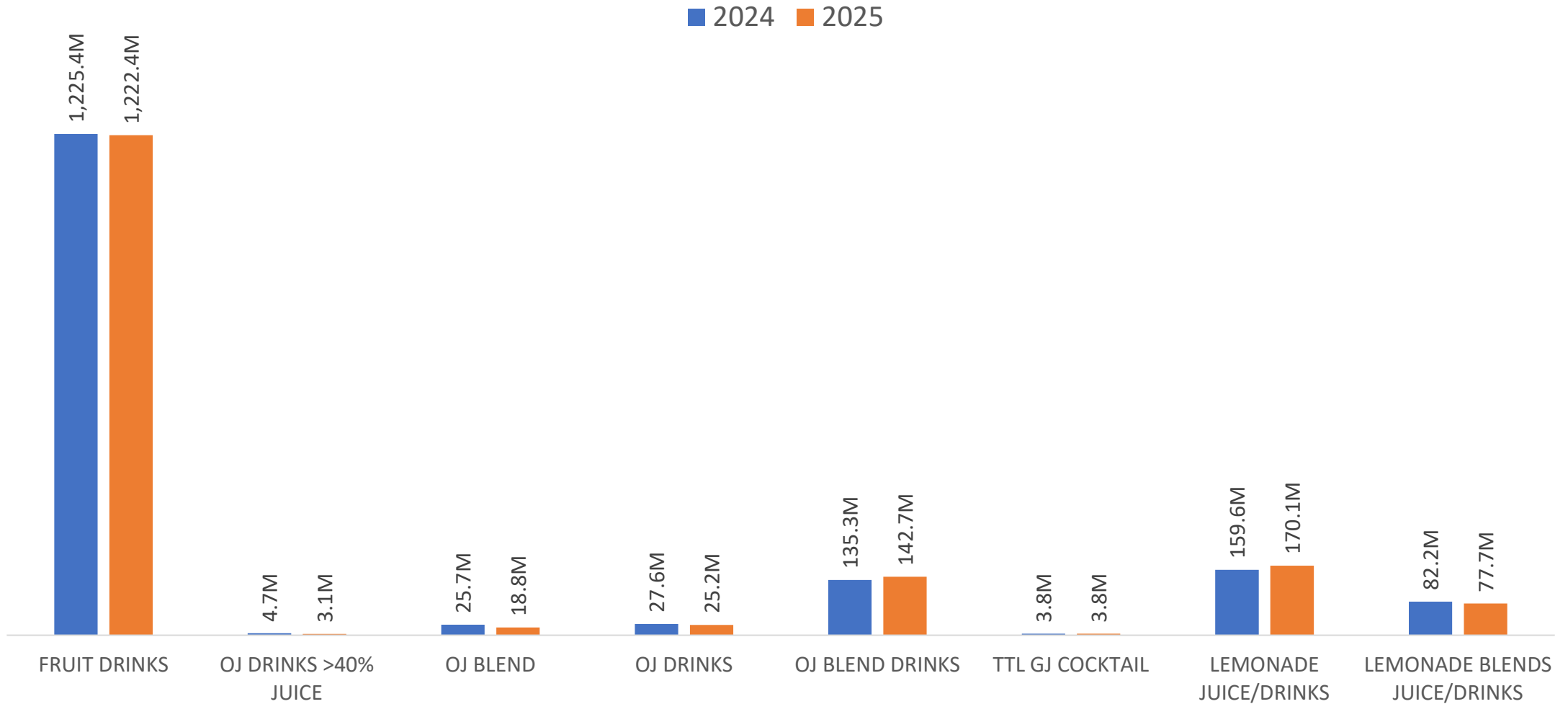
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Tea/Coffee –% Purchased on Any Perceived Deal



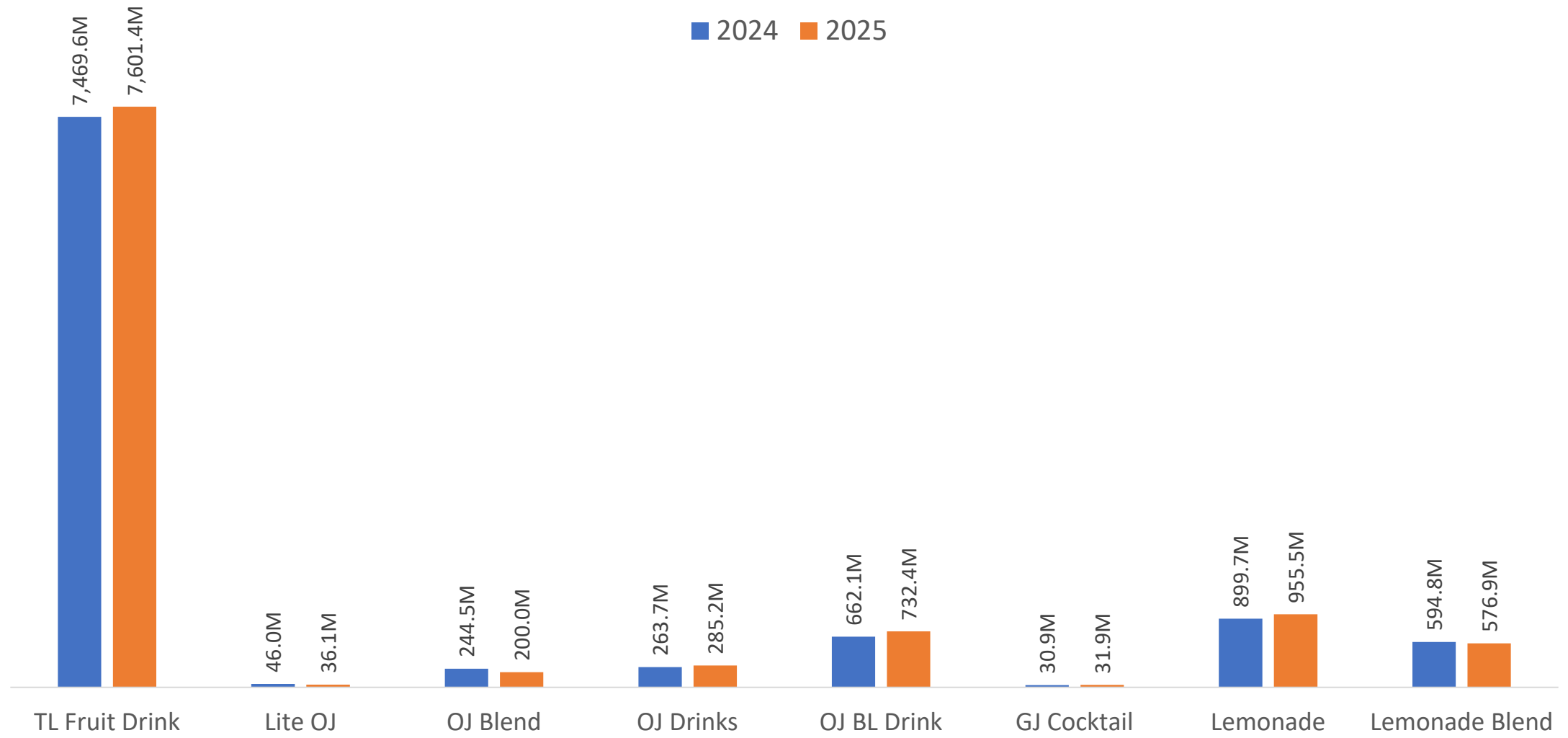
Source: Nielsen Homescan data for Y/E Dec 2025

Fruit Drink –Volume Sales



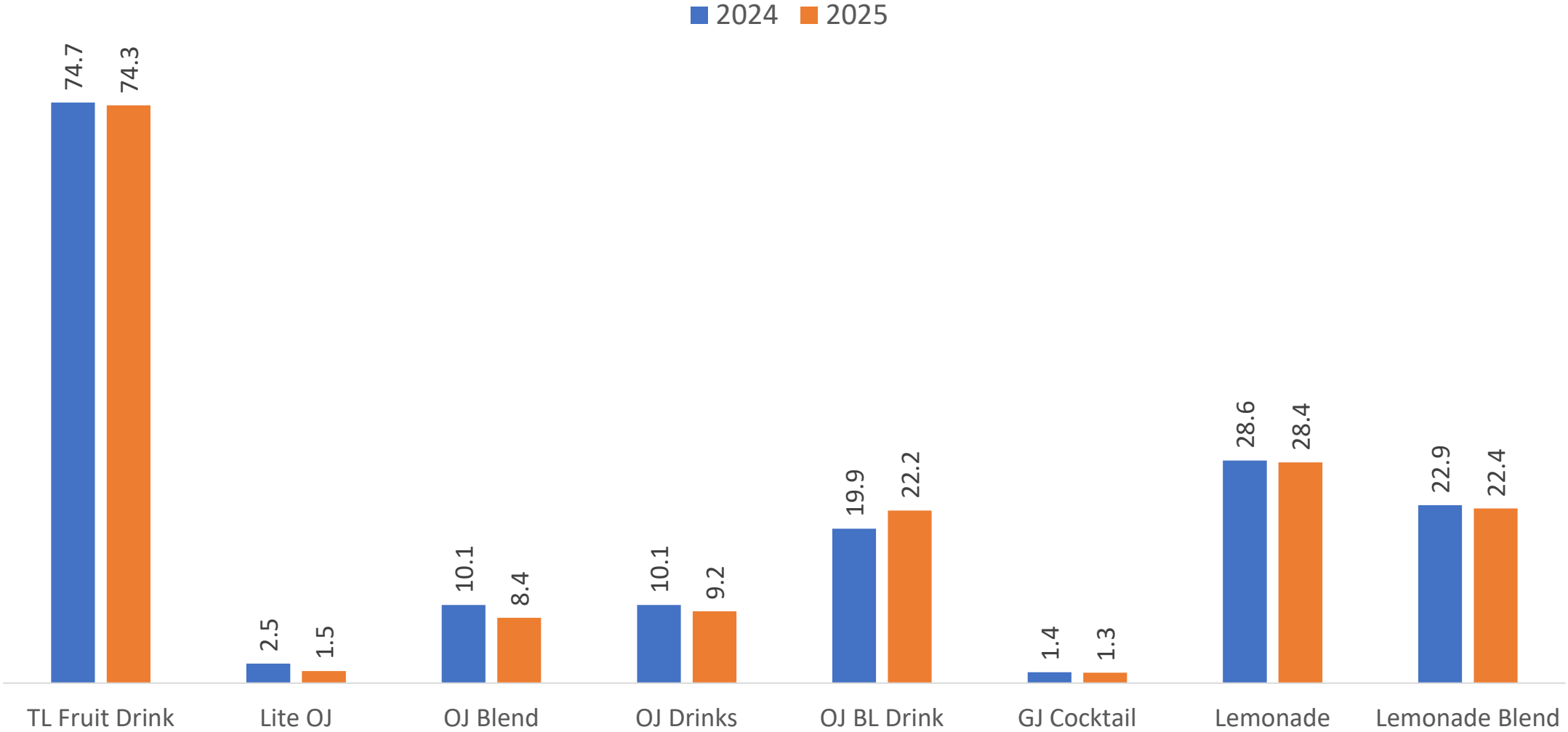
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Fruit Drink –Dollar Sales



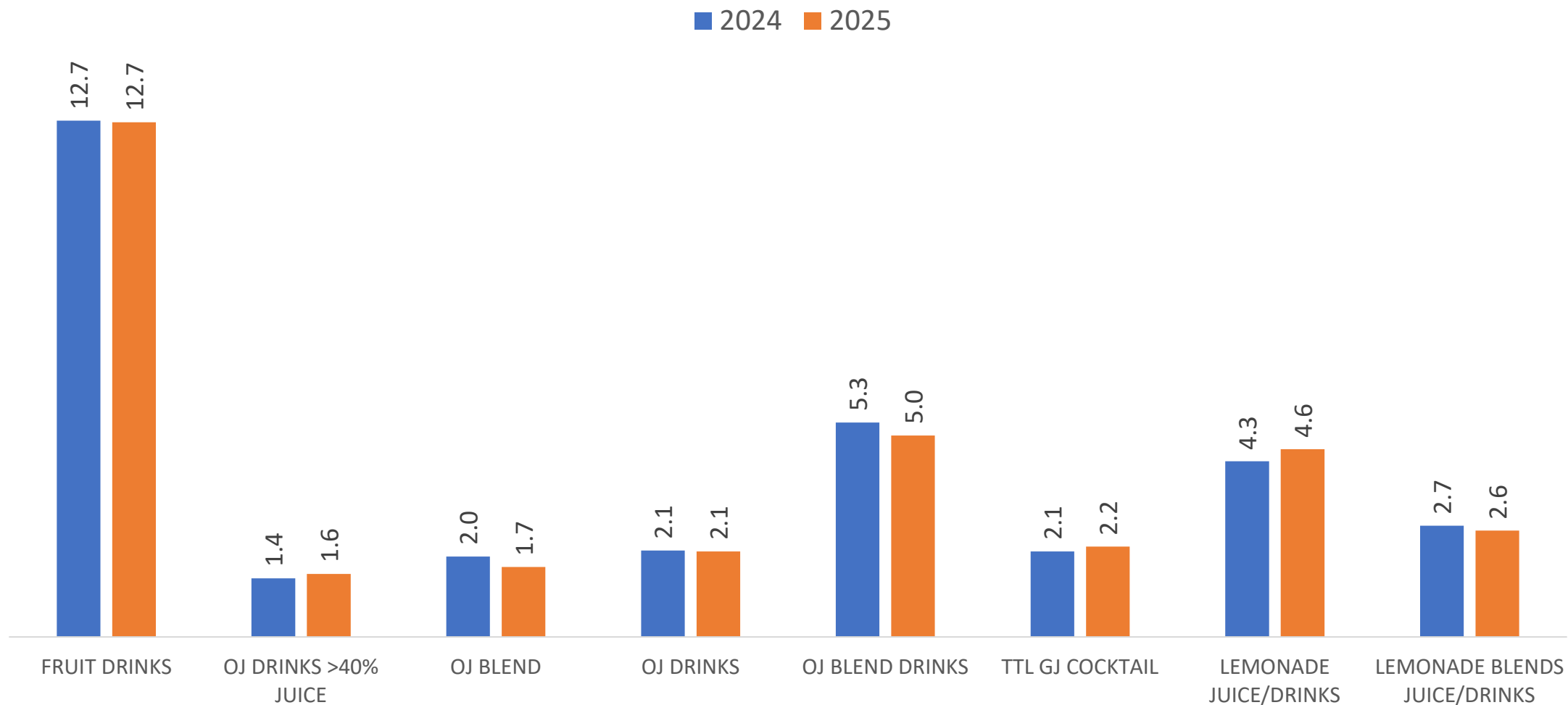
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Fruit Drink –Penetration



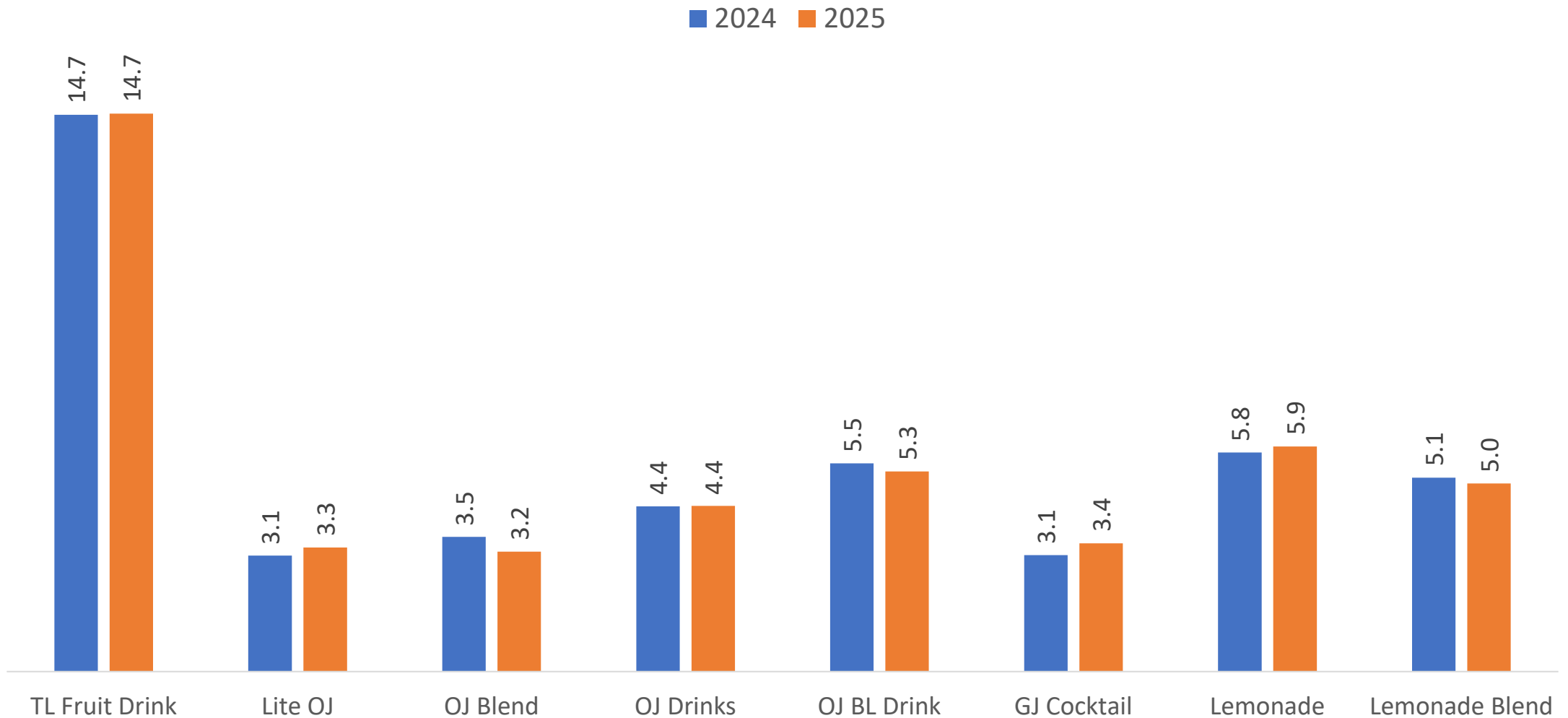
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Fruit Drink –Buying Rate



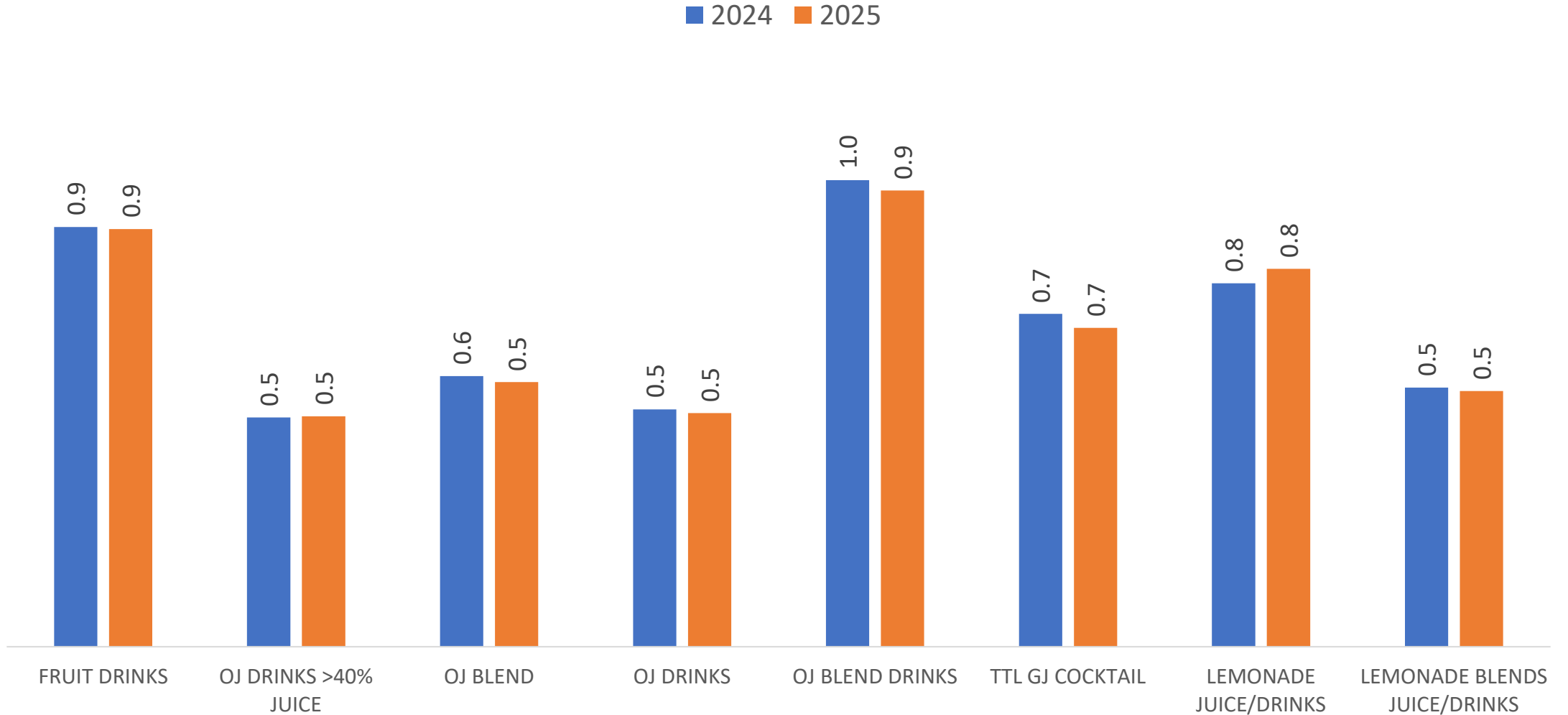
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Fruit Drink –Purchase Frequency



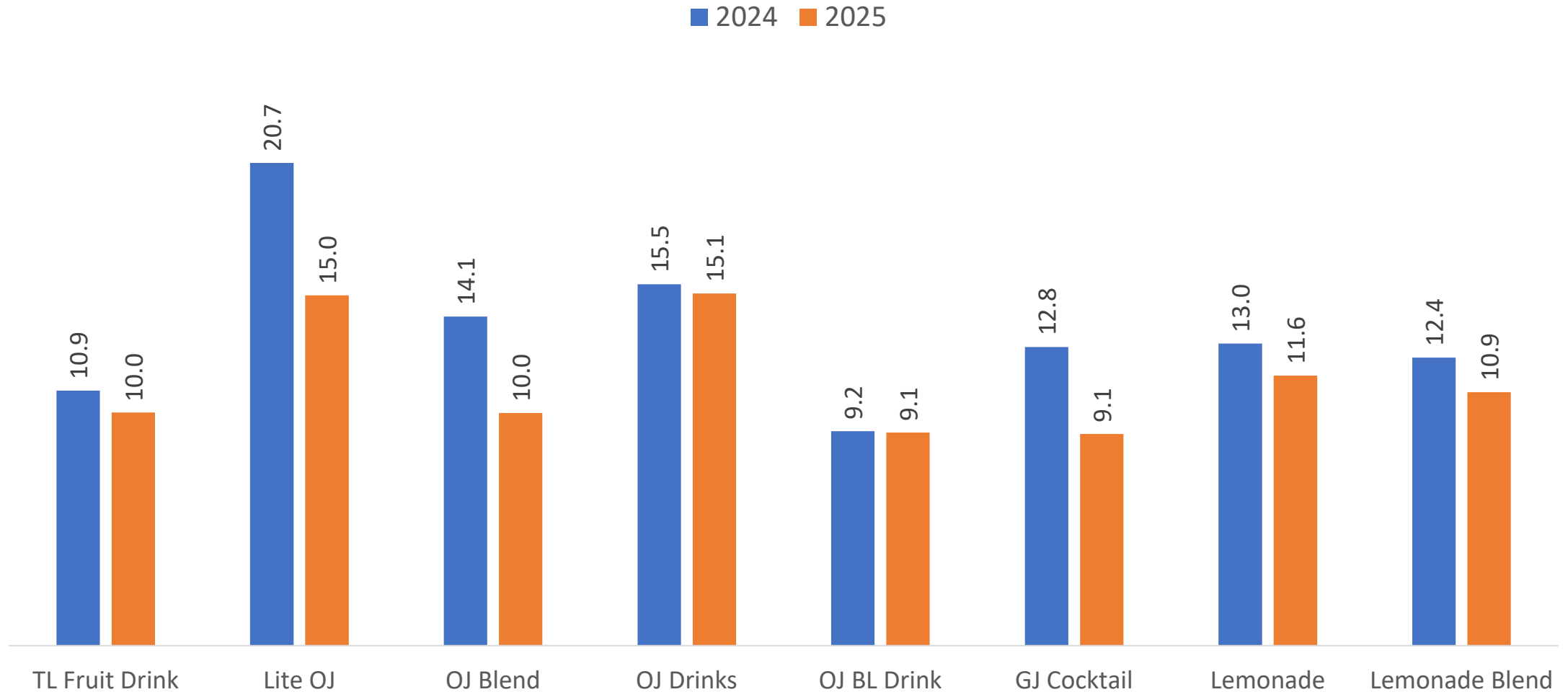
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Fruit Drink –Purchase Size



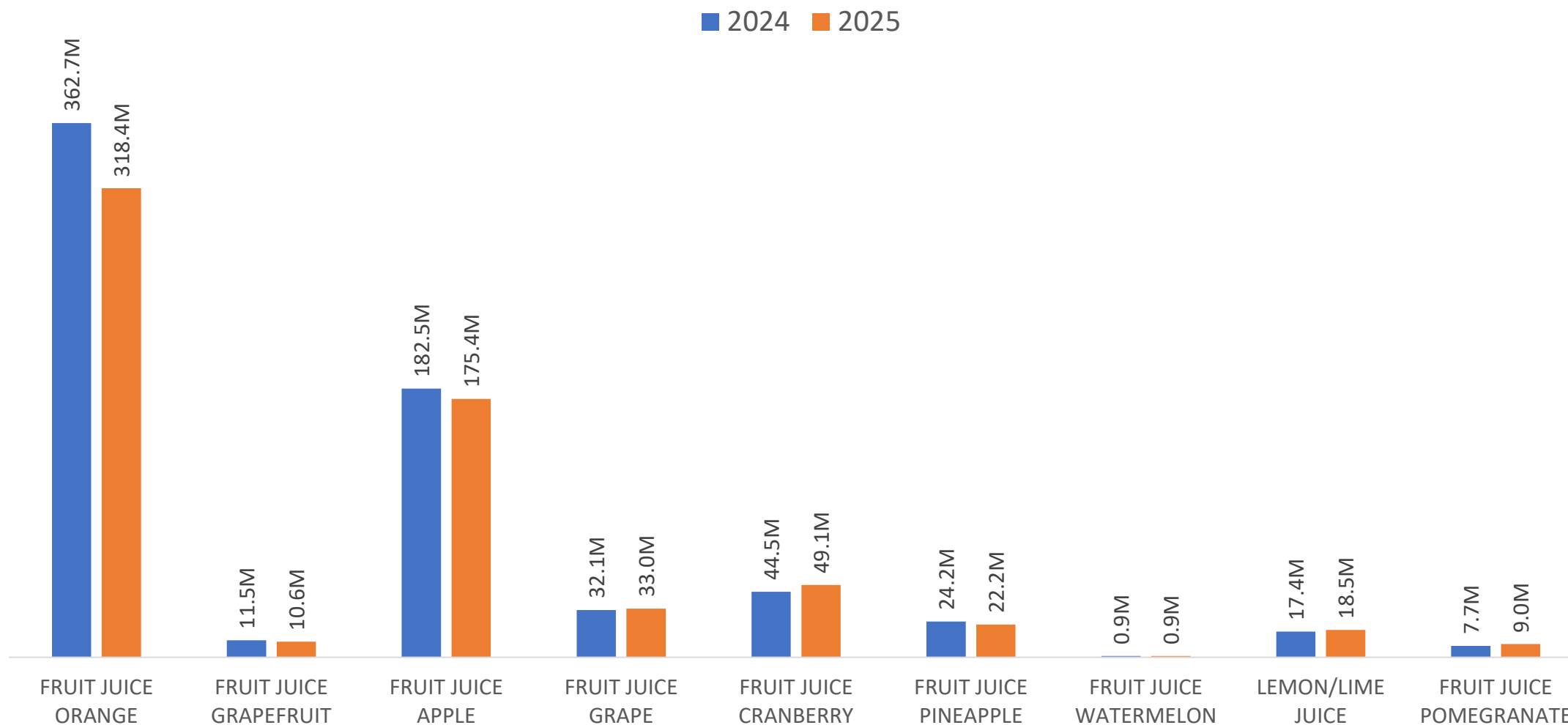
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Fruit Drink –% Purchased on Any Perceived Deal



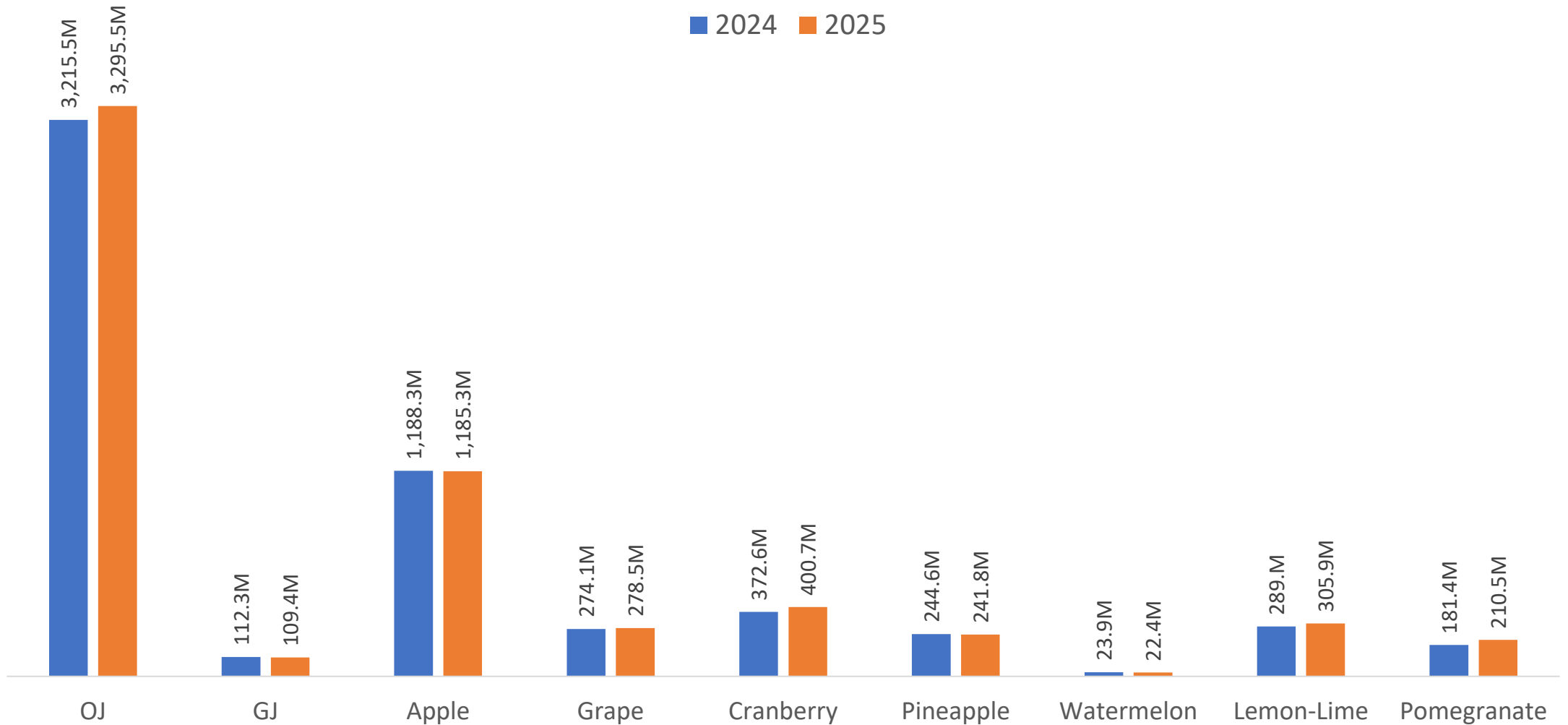
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice –Volume Sales



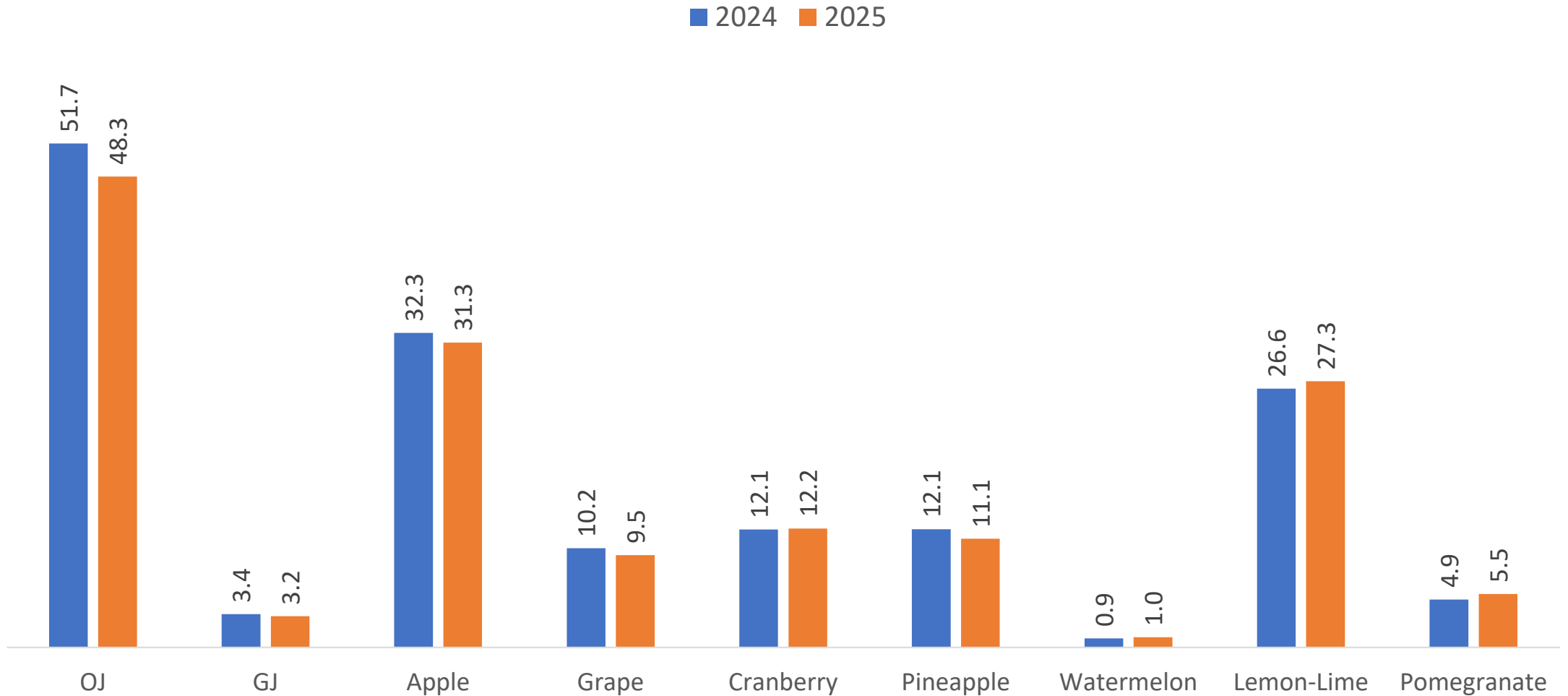
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100% Juice –Dollar Sales



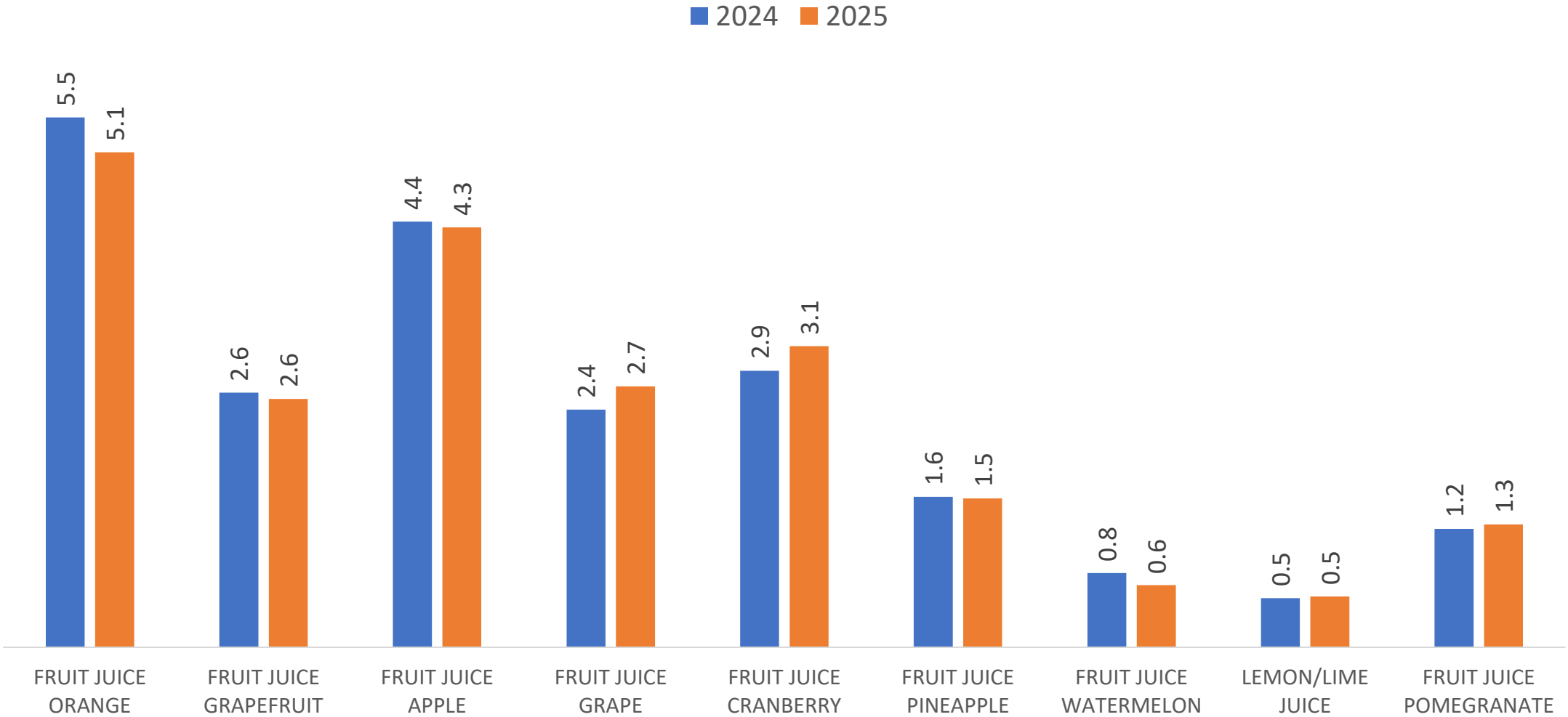
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice – Penetration



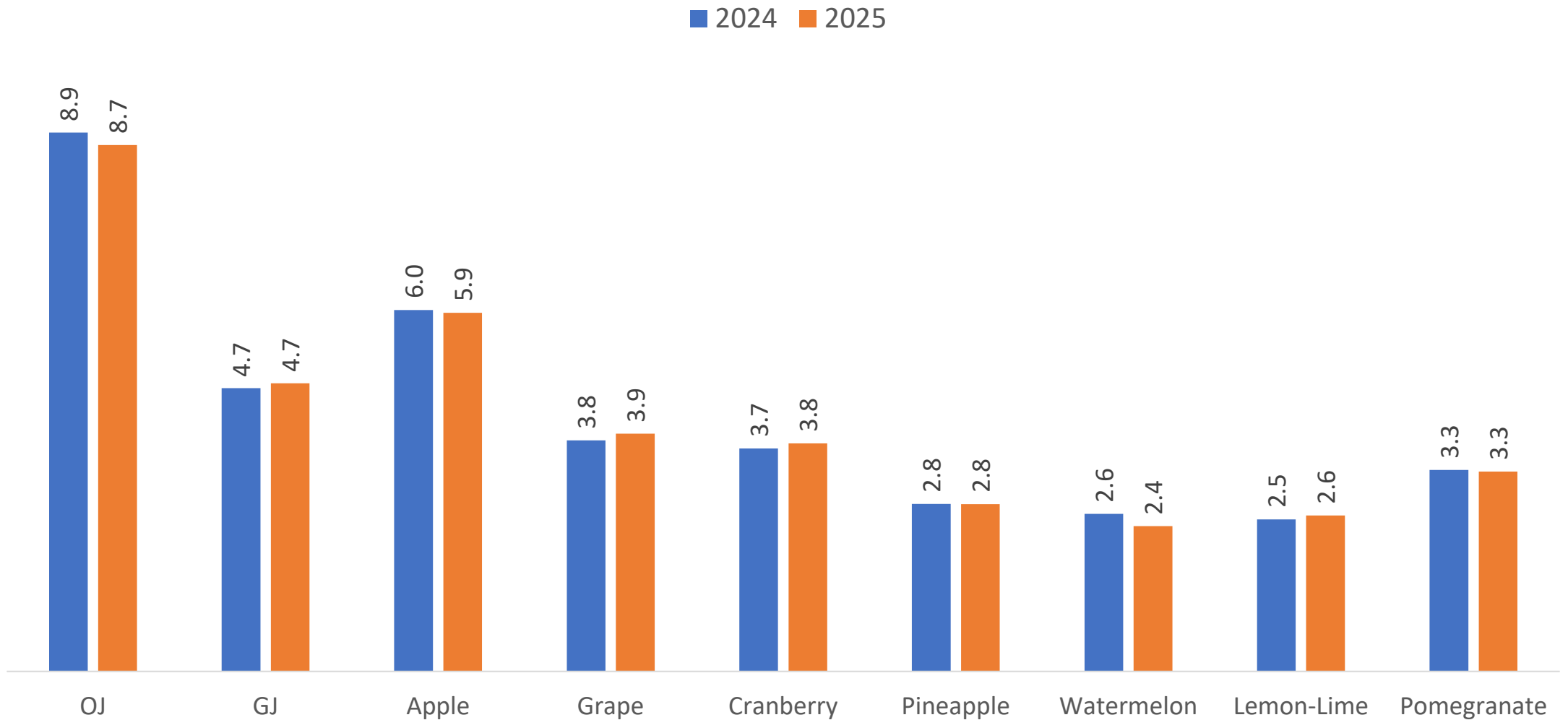
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice –Buying Rate



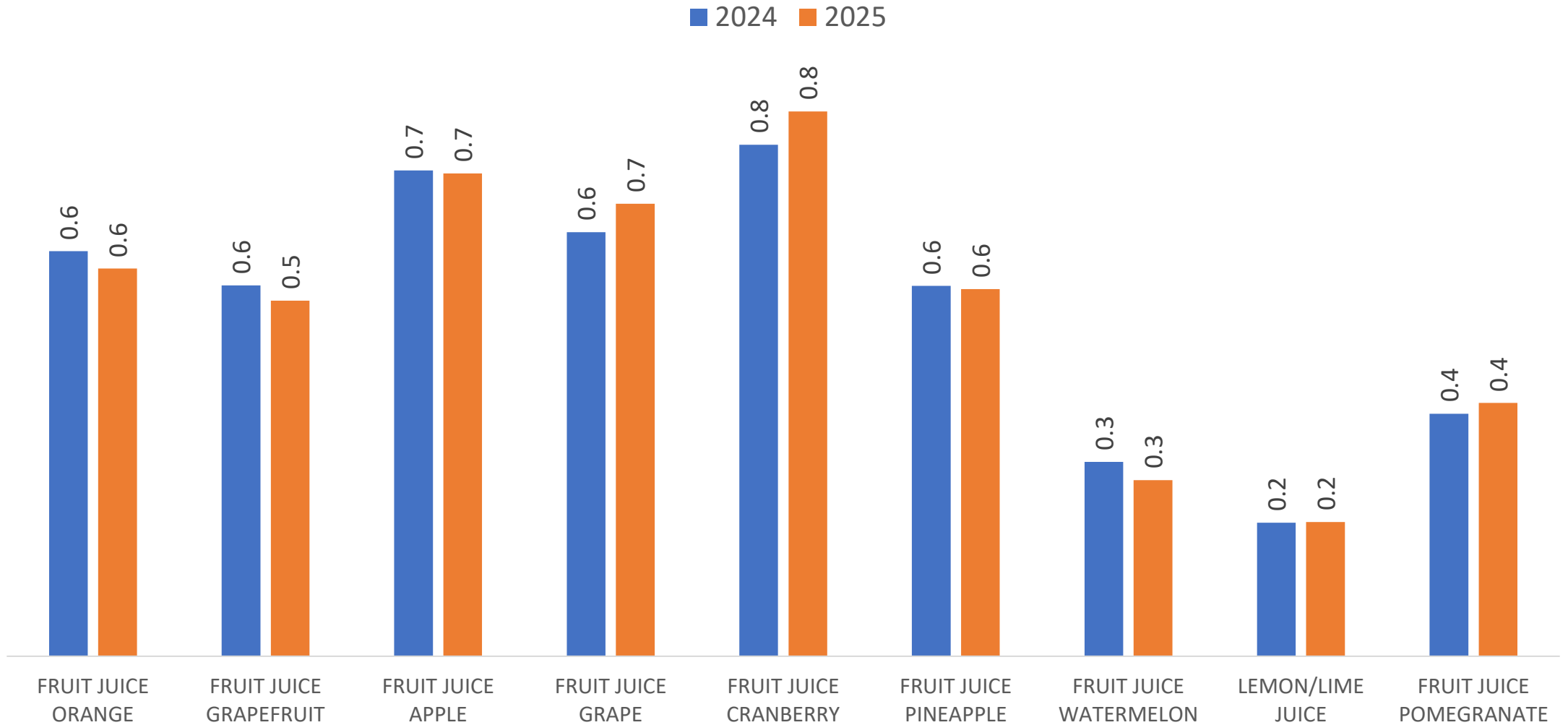
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice –Purchase Frequency



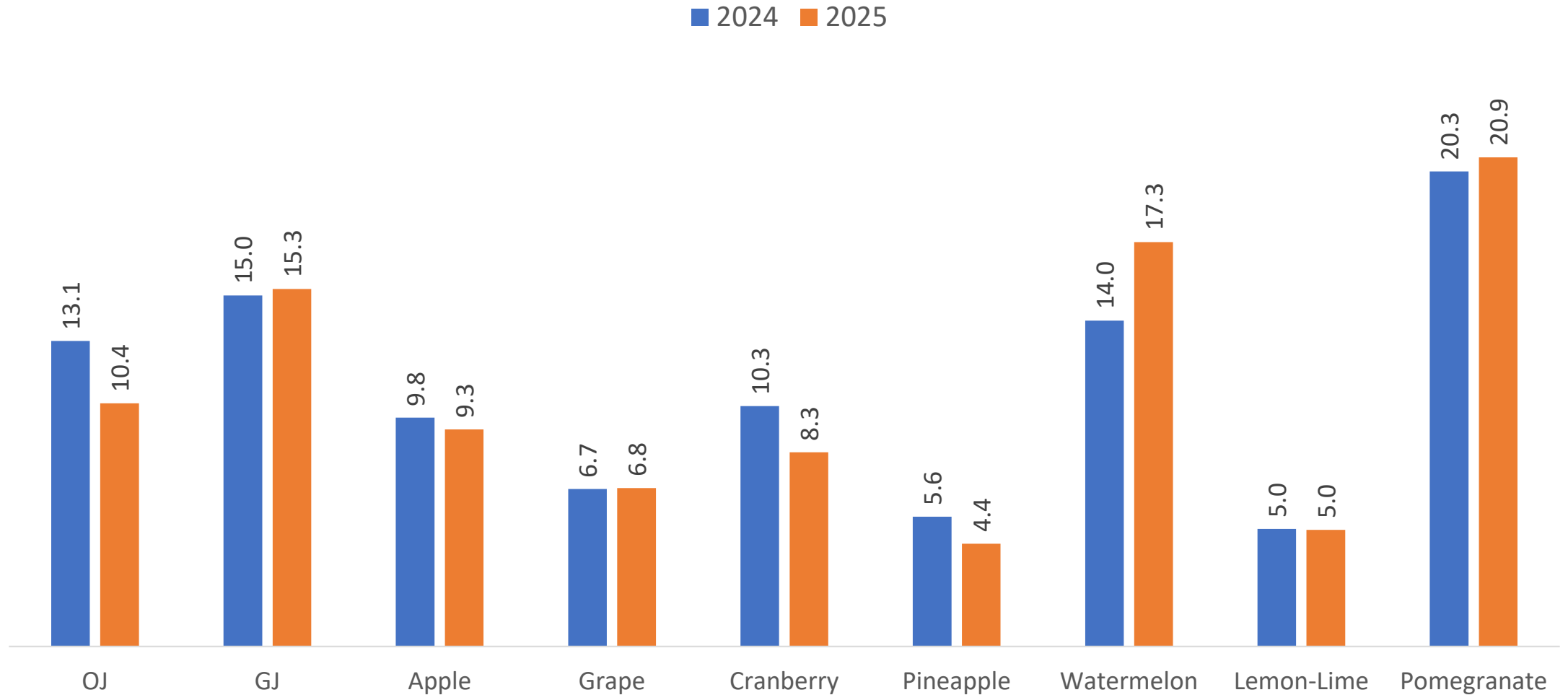
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100% Juice –Purchase Size



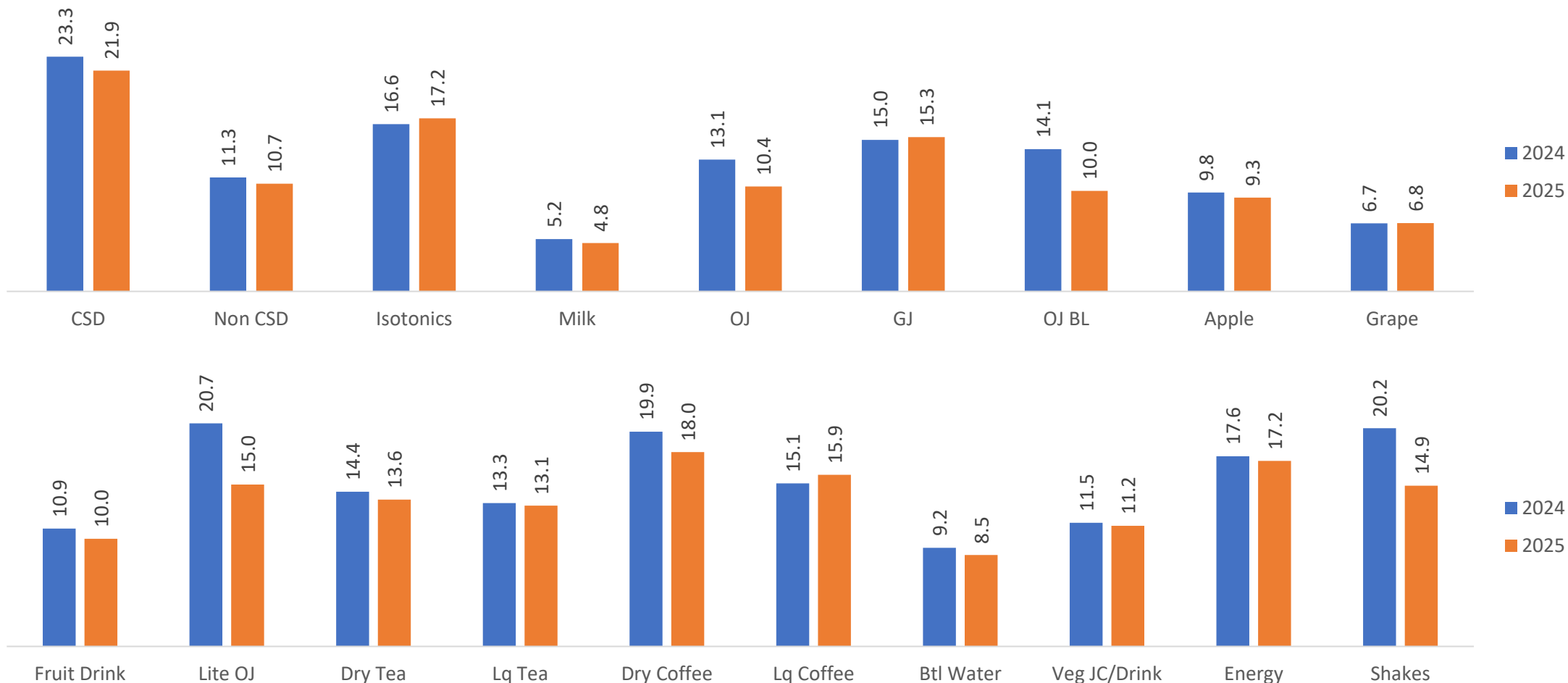
Source: Nielsen Homescan data for Y/E Dec 2025

100% Juice –% Purchased on Any Perceived Deal



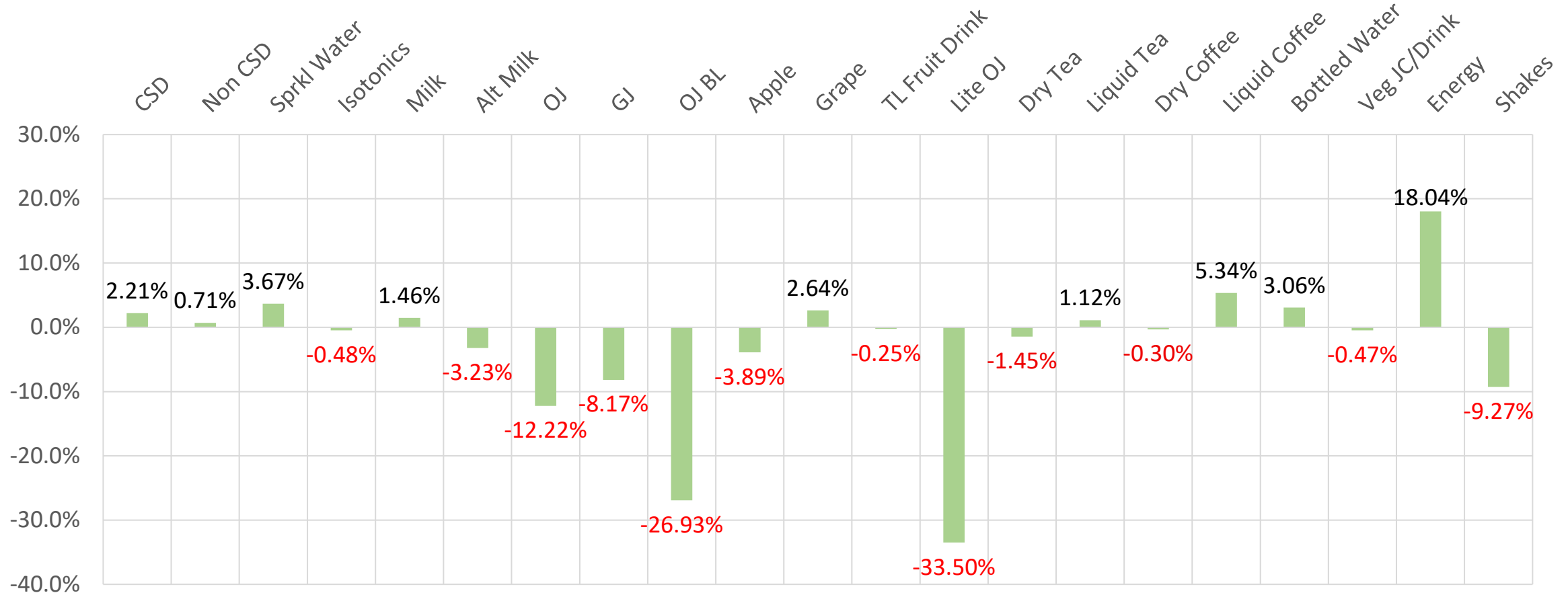
Source: Nielsen Homescan data for Y/E Dec 2025

Beverages –% Purchased on Any Perceived Deal



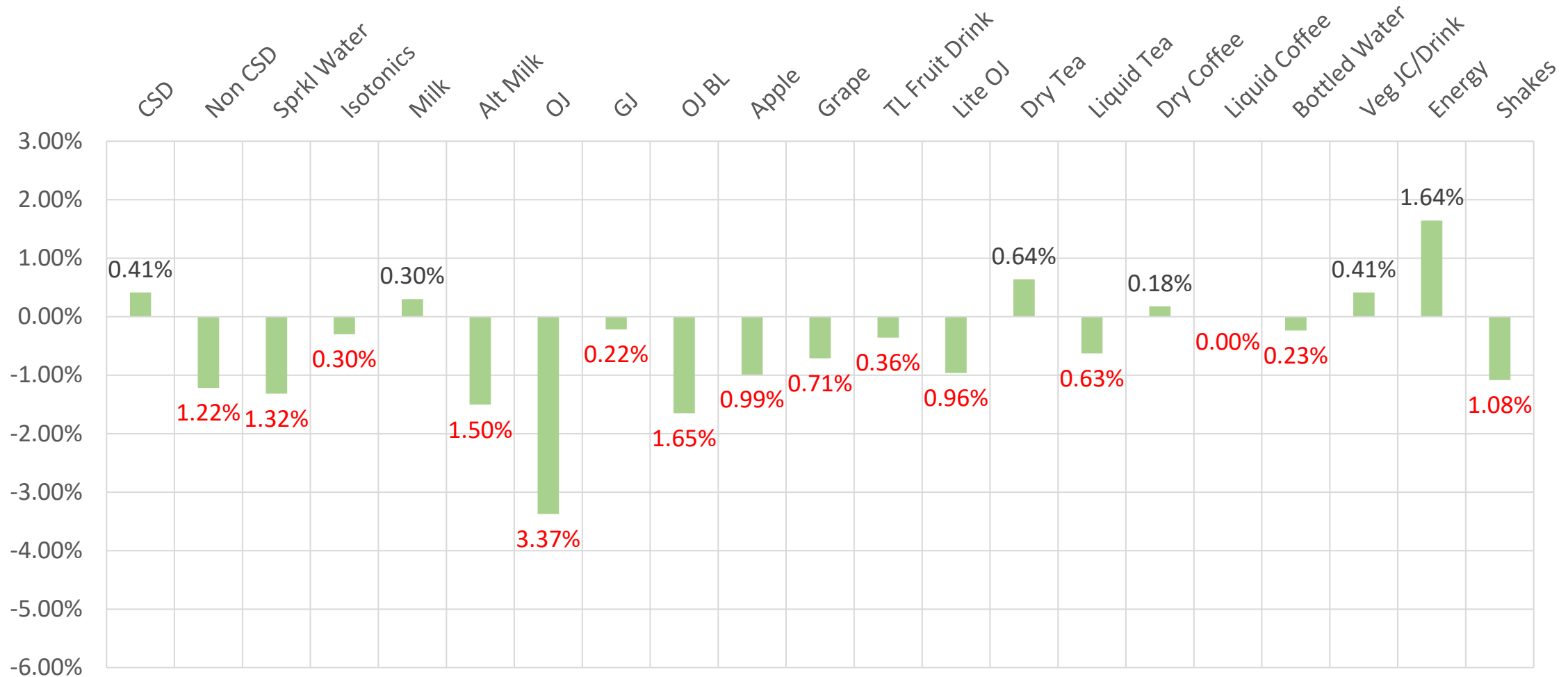
Source: Nielsen Homescan data for Y/E Dec 2025

Beverages – Volume Percent Change (2024 vs. 2025)



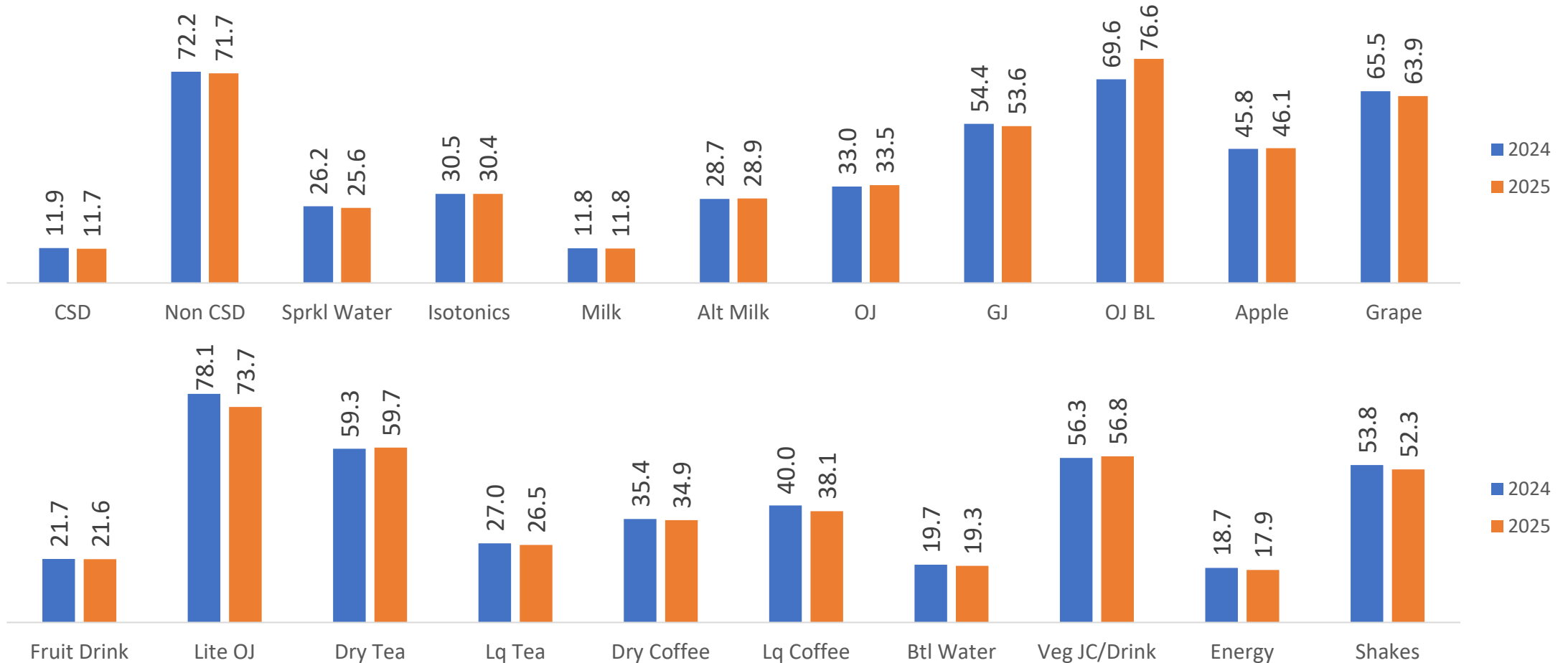
Source: Nielsen Homescan data for Y/E Dec 2025

Beverages – % Change in Household Penetration (2024 vs. 2025)



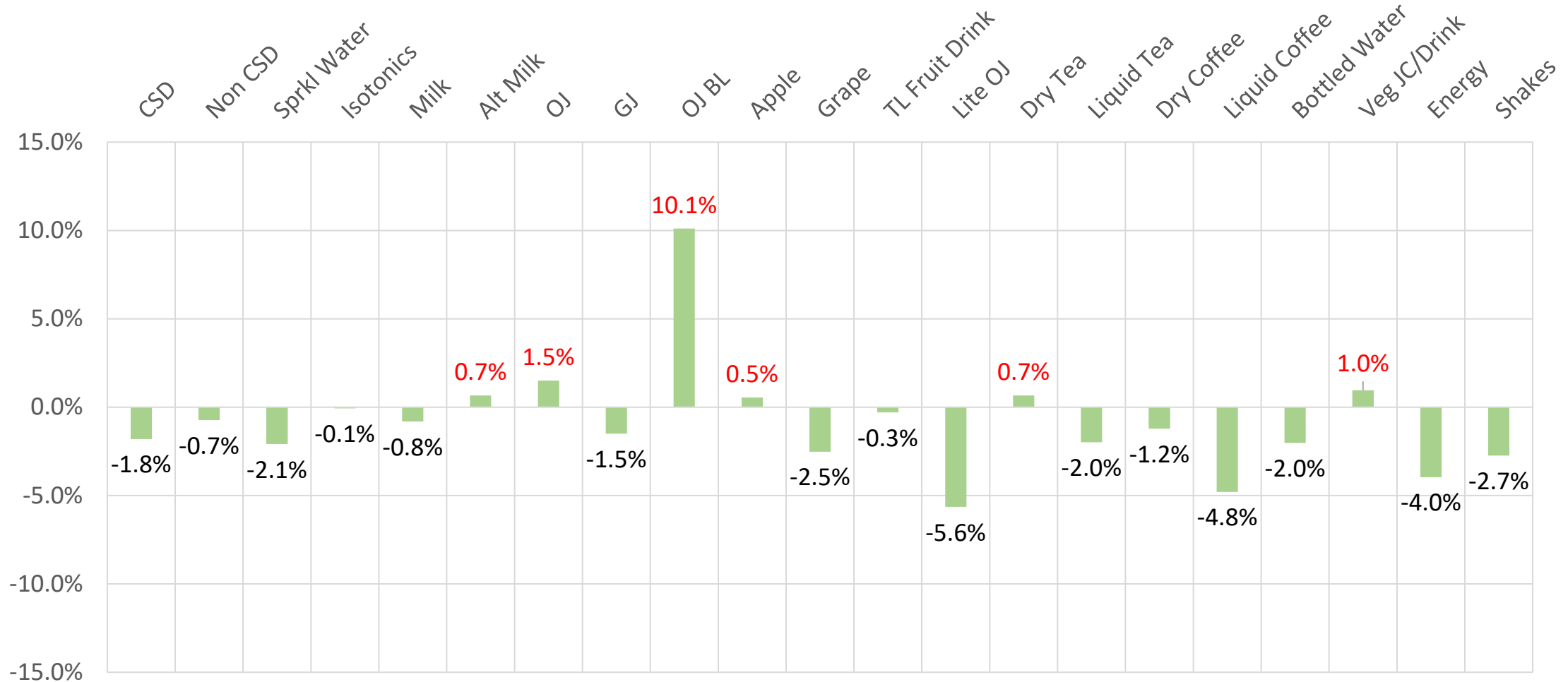
Source: Nielsen Homescan data for Y/E Dec 2025

Beverages - Days between Purchases (2 + Time Buyer)



Source: Nielsen Homescan data for Y/E Dec 2025

Beverages - Days between Purchases (Pct Chg. 2024 vs. 2025)



Source: Nielsen Homescan data for Y/E Dec 2025

A stylized illustration featuring two light gray hands. The hand in the top left is holding a solid orange circle. The hand in the bottom right is also holding a solid orange circle. The text 'Orange Juice Purchasing Review' is centered between the two hands.

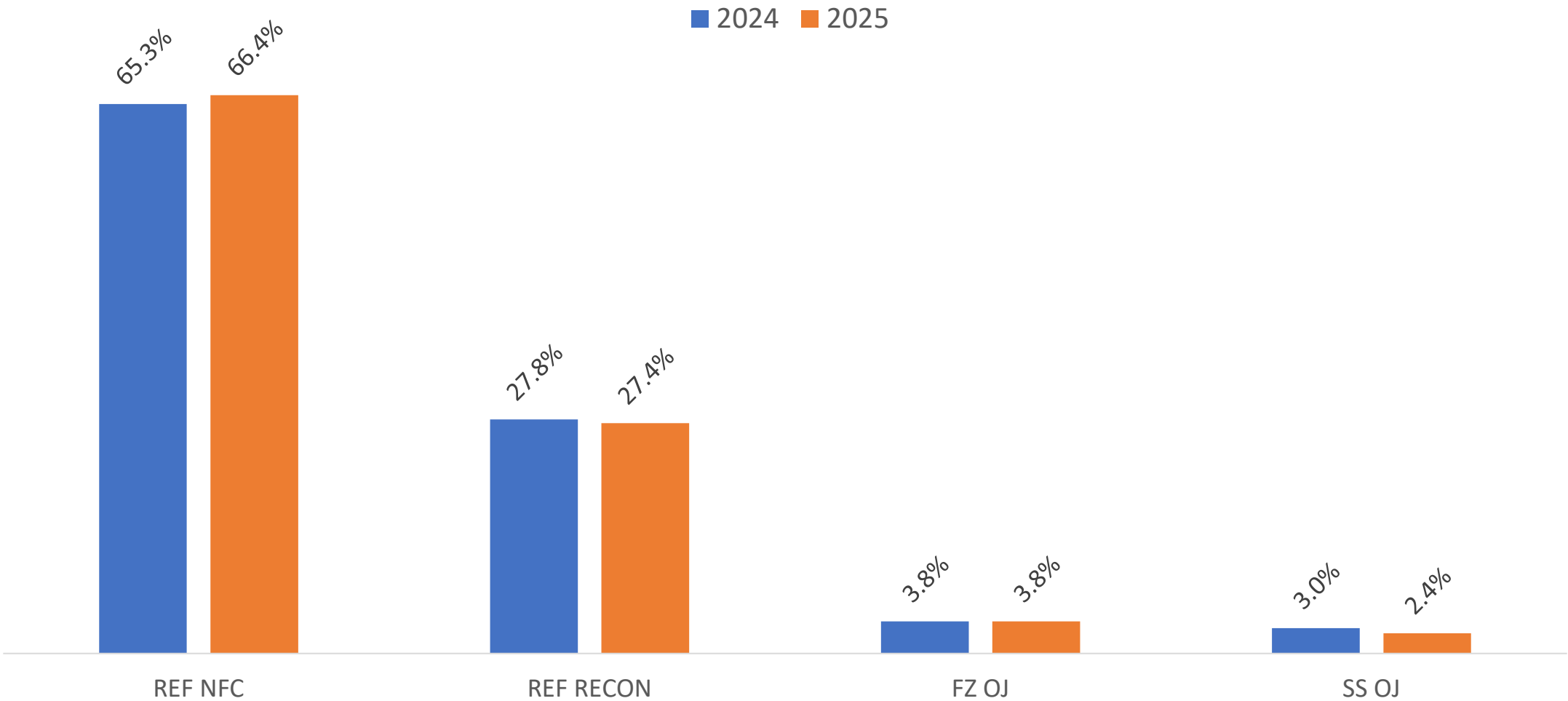
Orange Juice Purchasing Review

OJ HH Purchasing Trends

Year	Household Penetration	Buying Rate*	Purchase Frequency*	% Purchased on Perceived Deal
2011	67.4	5.7	7.7	31
2012	65.1	5.6	7.7	30
2013	64.9	5.4	7.5	32
2014	62.4	5.2	7.3	31
2015	62.7	4.8	6.9	29
2016	61.3	4.6	6.6	28
2017	59.5	4.3	6.4	24
2018	56.9	4.1	6.2	23
2019	54.8	3.9	6.1	22
2020	57.5	4.3	6.6	18
2021	56.2	3.9	6.1	16
2022	57.6	3.7	6.2	13
2023	51.3	3.4	5.9	15
2024*	51.5	5.5	8.9	13
2025*	48.2	5.1	8.7	10

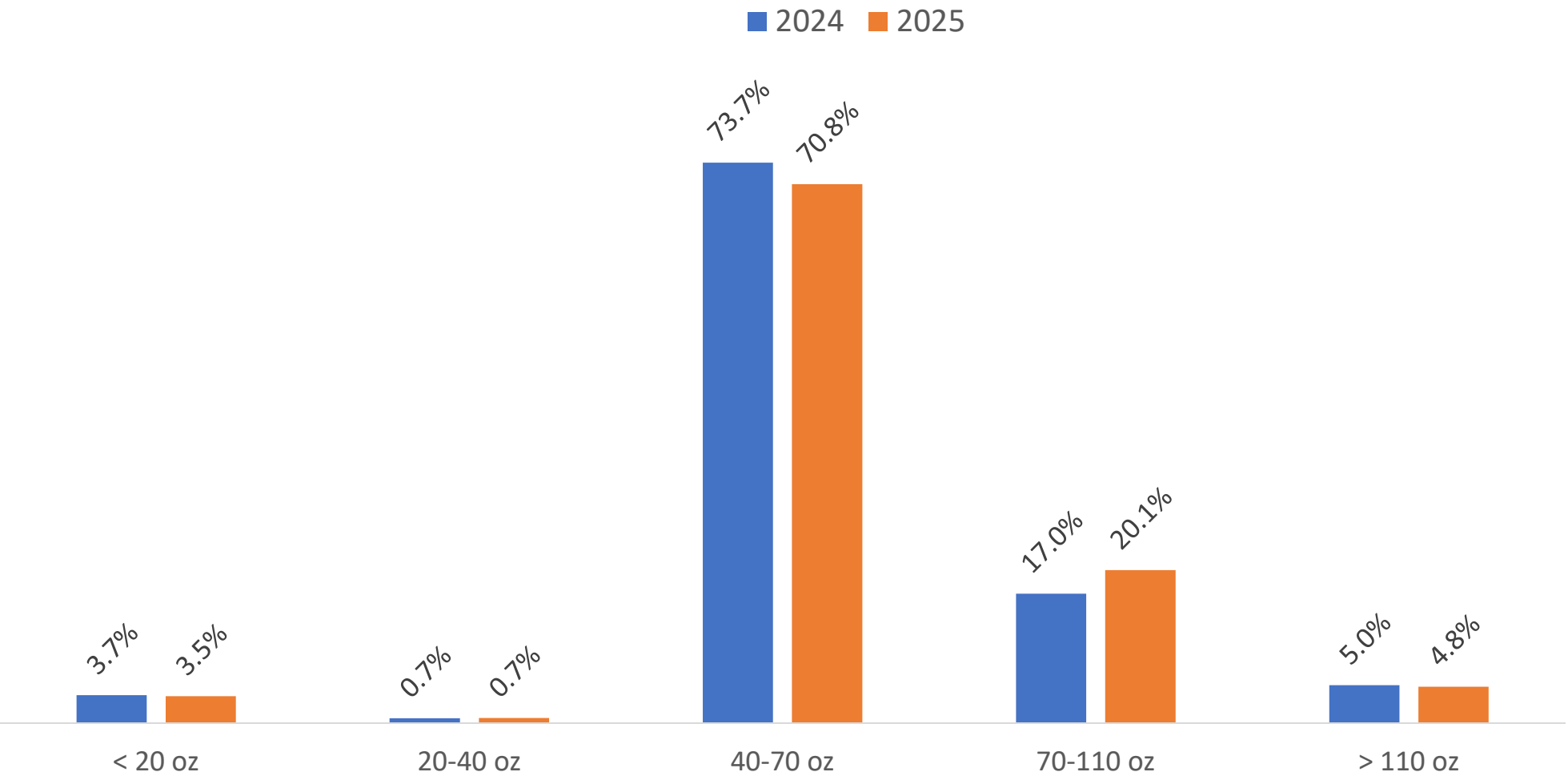
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –% Share by Type



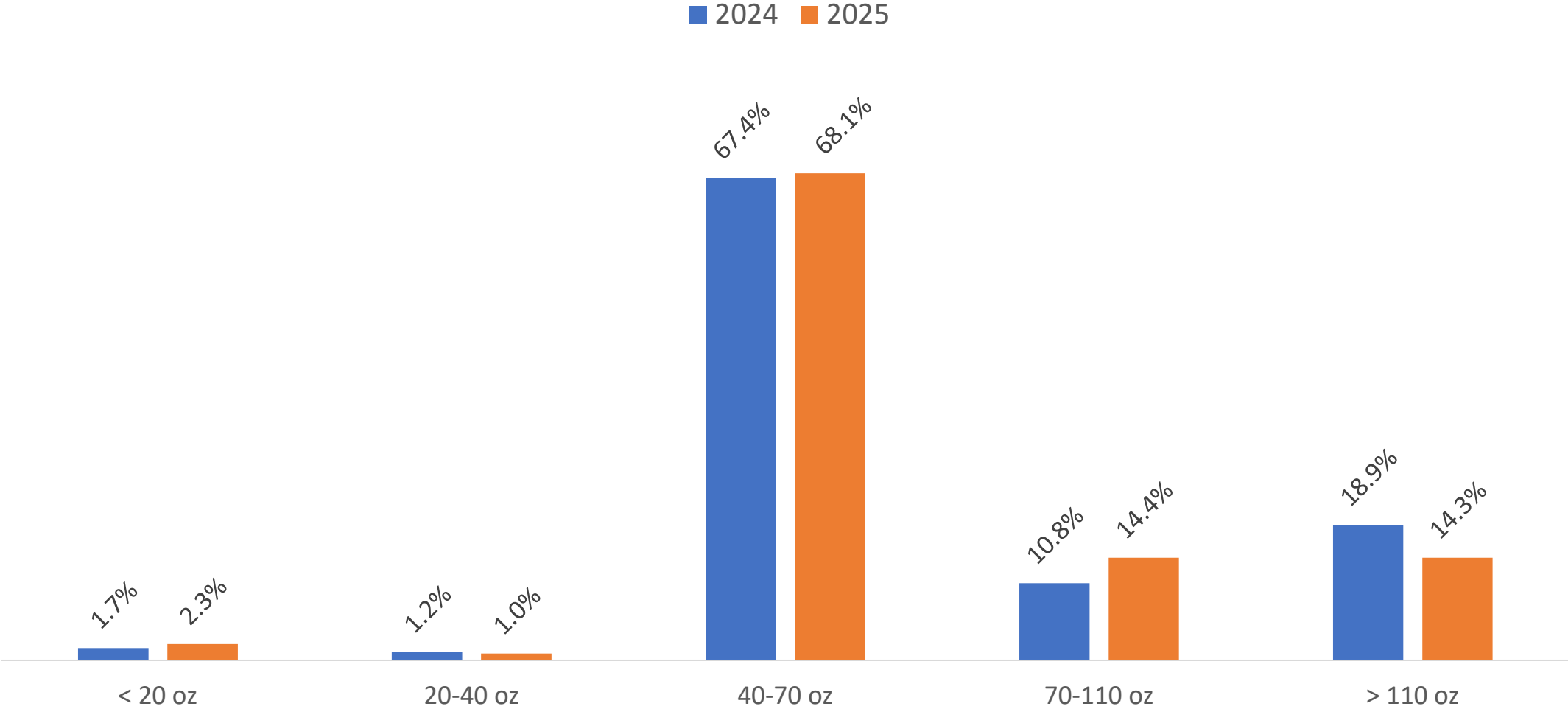
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF NFC % Share by Size



Source: Nielsen Homescan data for Y/E Dec 2025

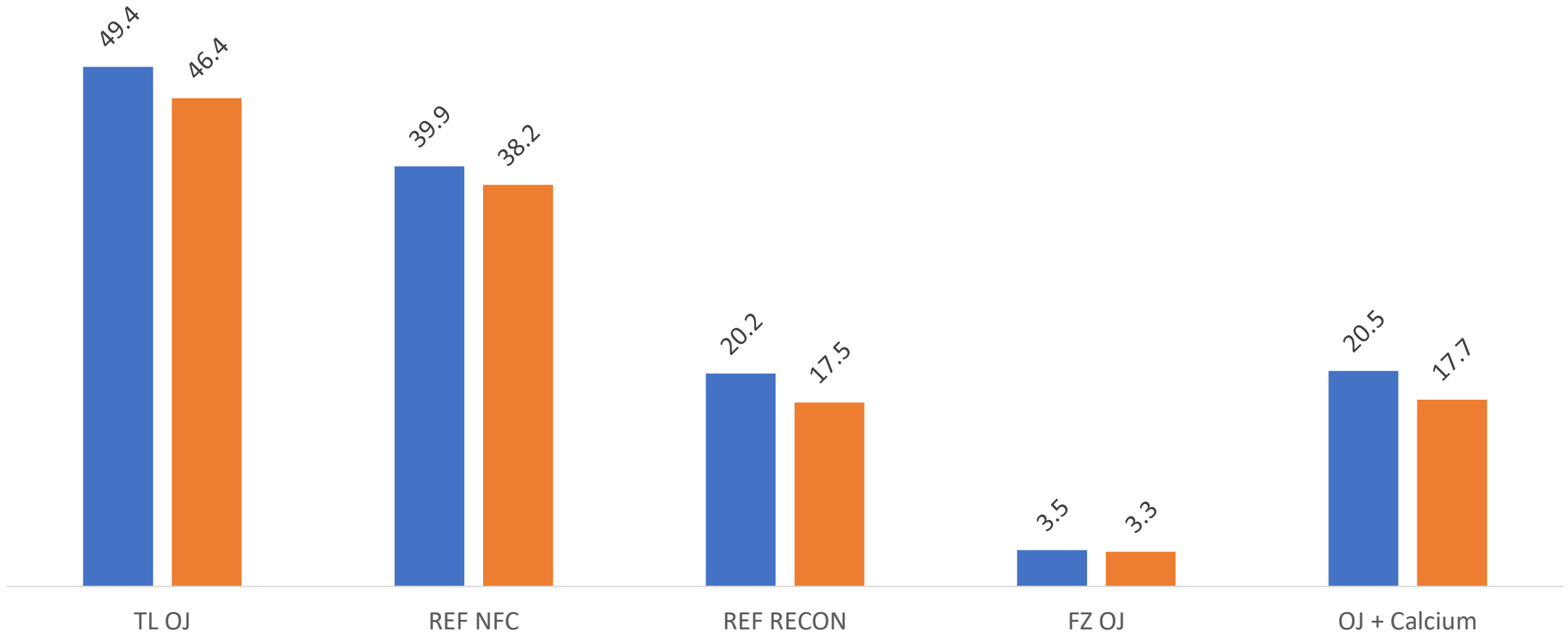
Orange Juice – REF RECON % Share by Size



Source: Nielsen Homescan data for Y/E Dec 2025

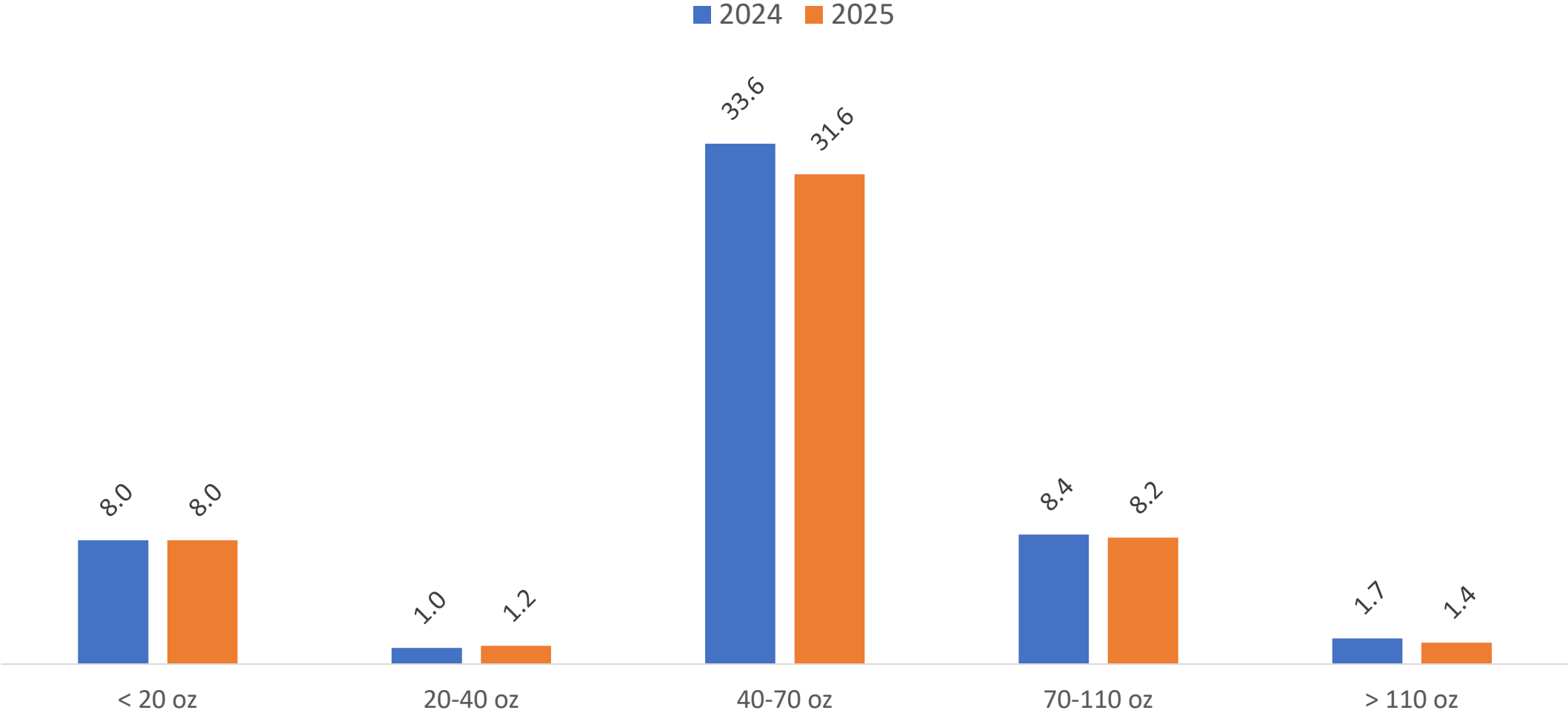
Orange Juice – Penetration

■ 2024 ■ 2025



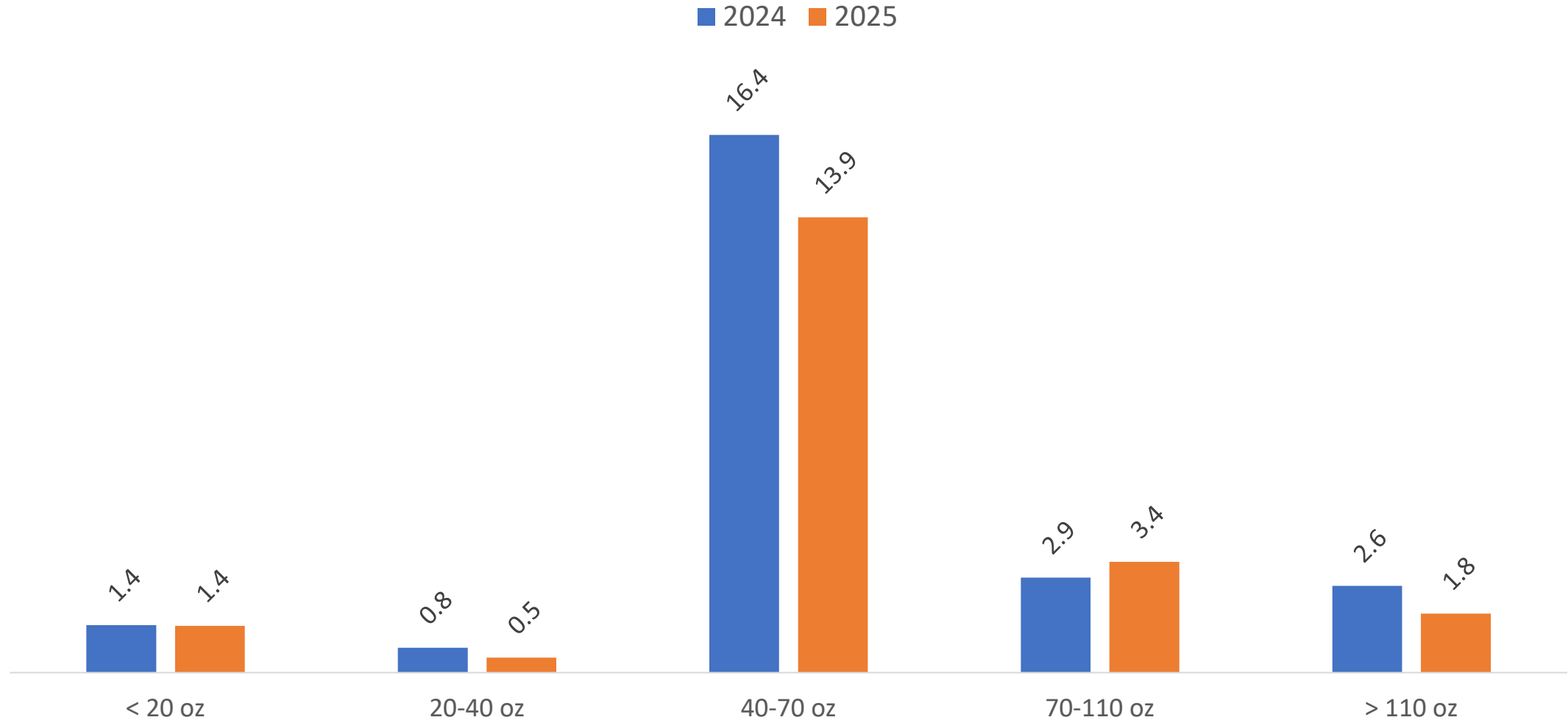
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF NFC Penetration by Container Size



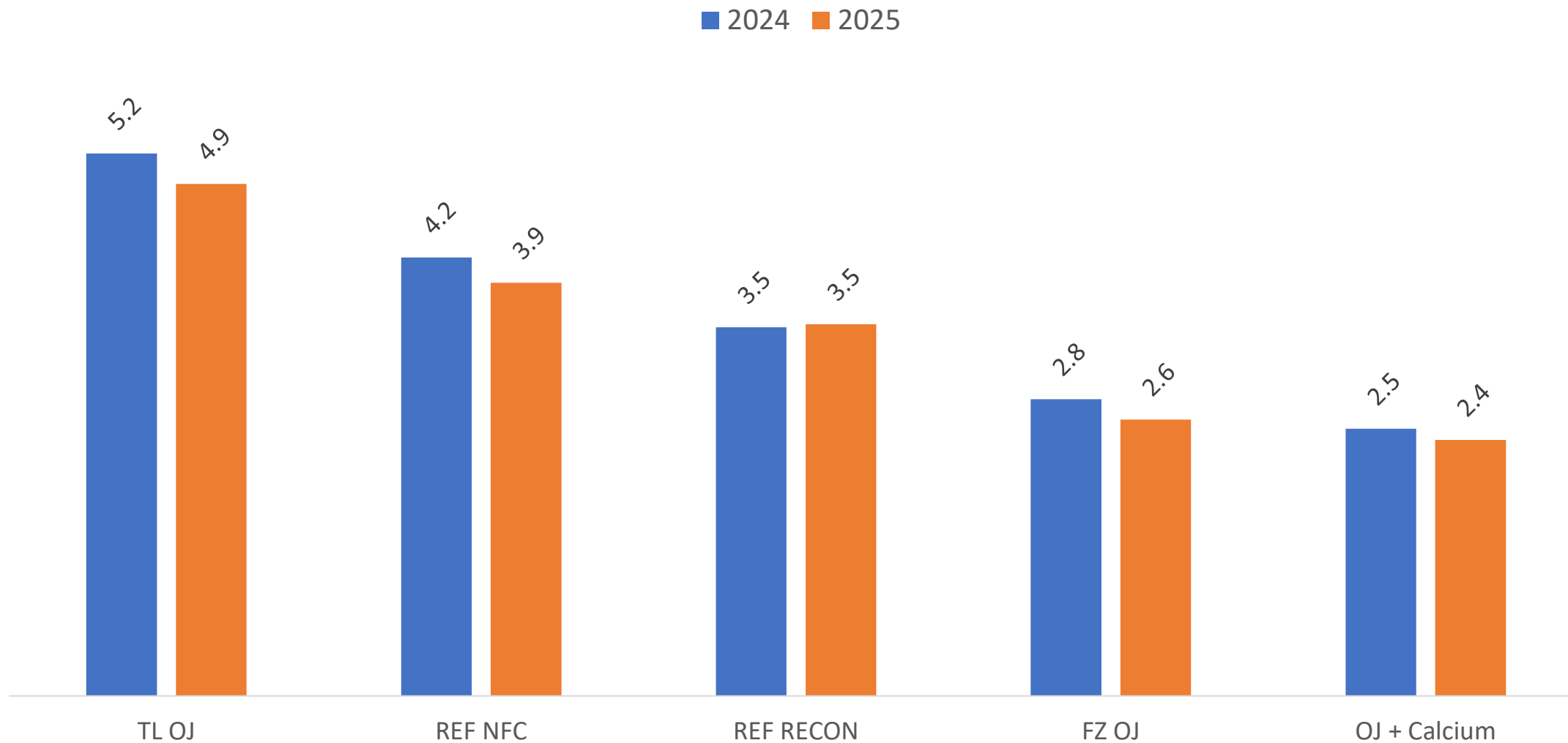
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF RECON Penetration by Container Size



Source: Nielsen Homescan data for Y/E Dec 2025

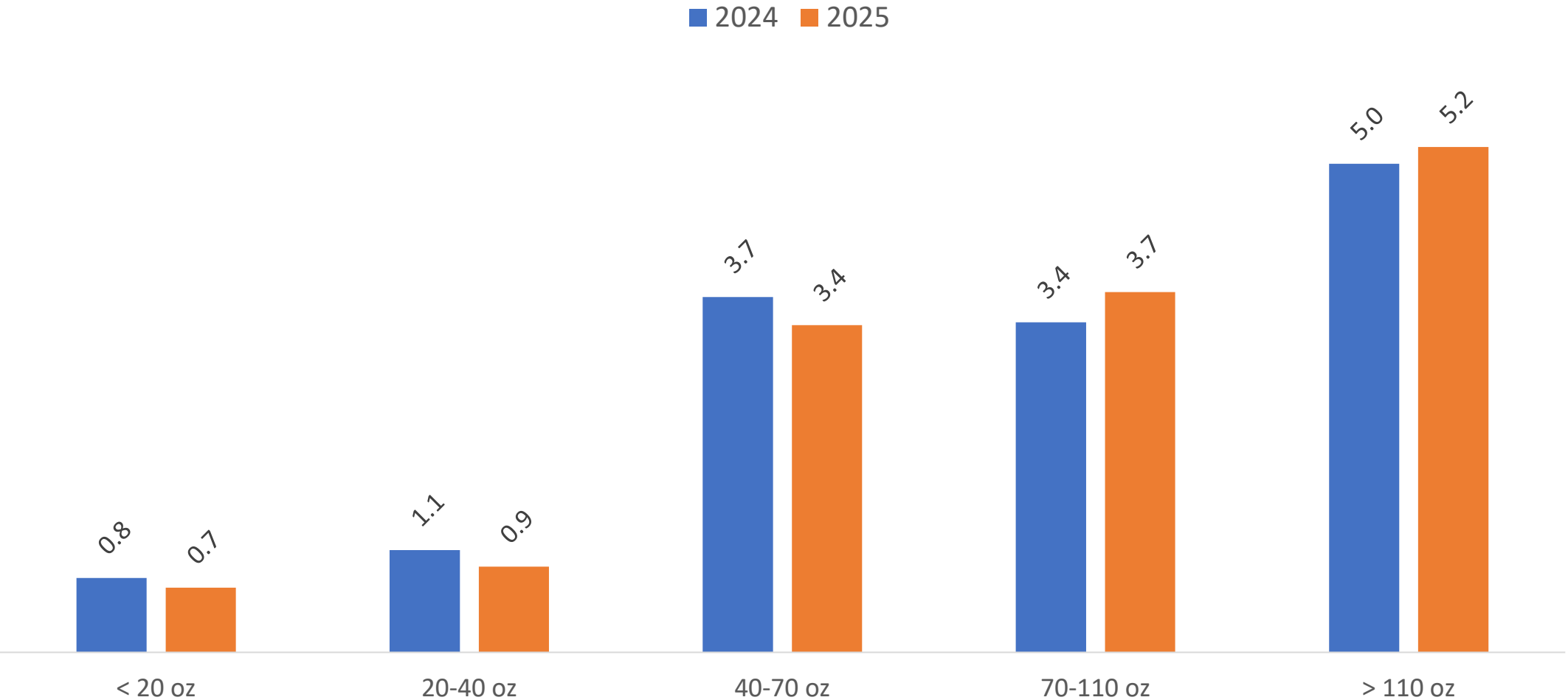
Orange Juice –Buying Rate



Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF NFC

Buying Rate by Size

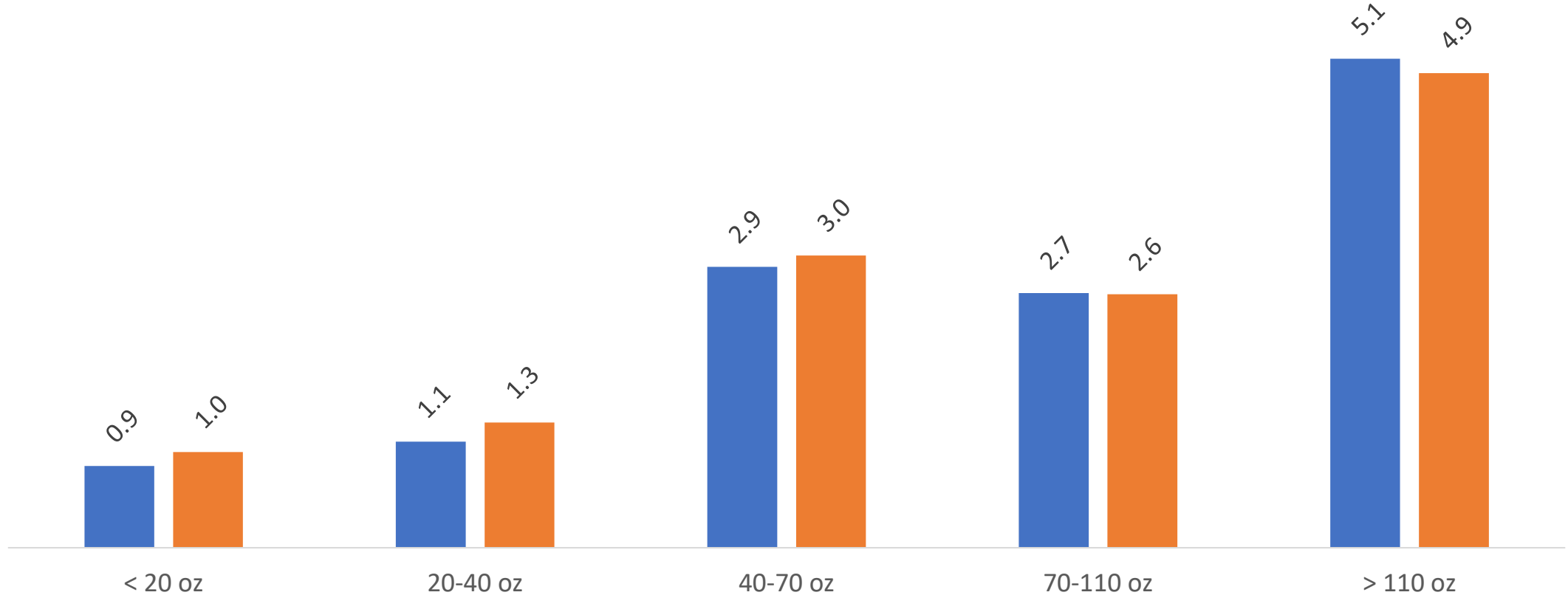


Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF RECON

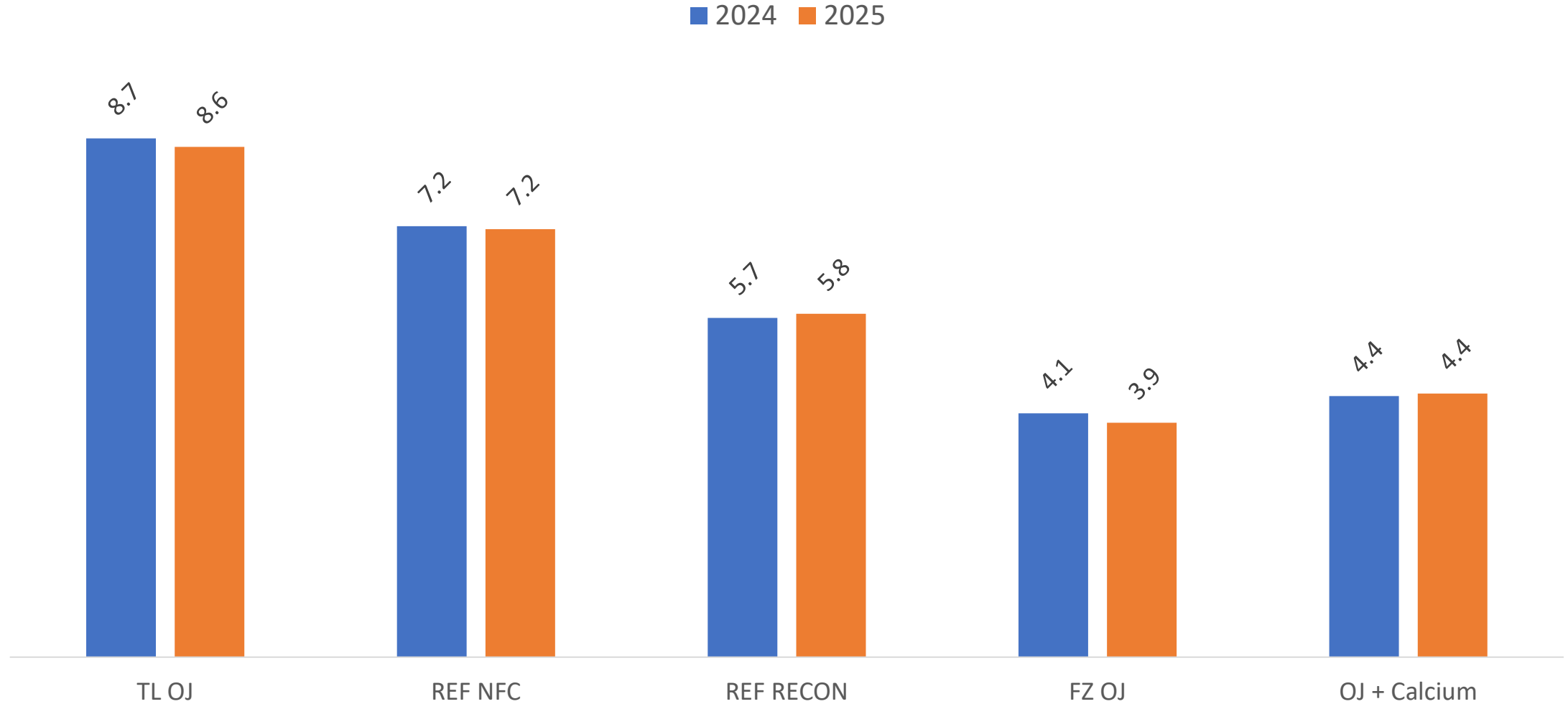
Buying Rate by Size

■ 2024 ■ 2025



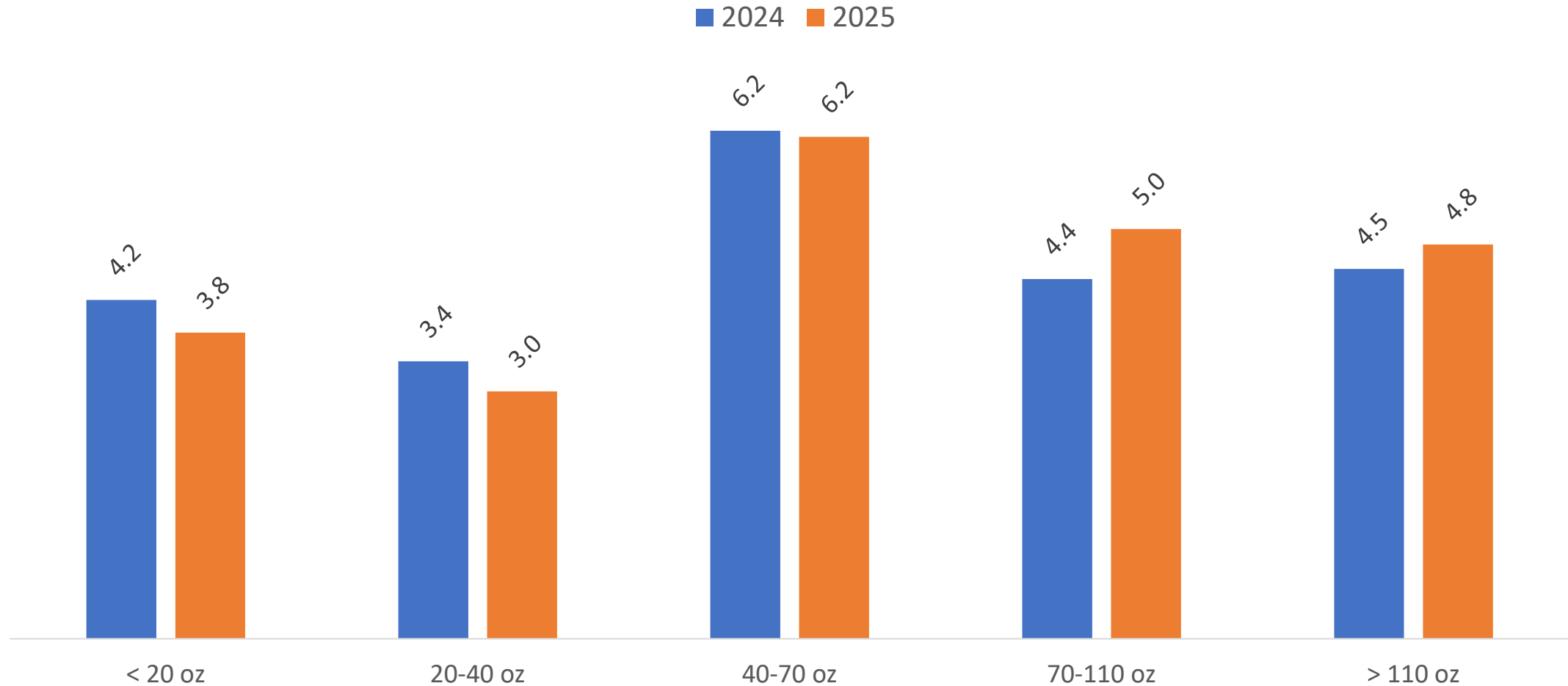
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –Purchase Frequency



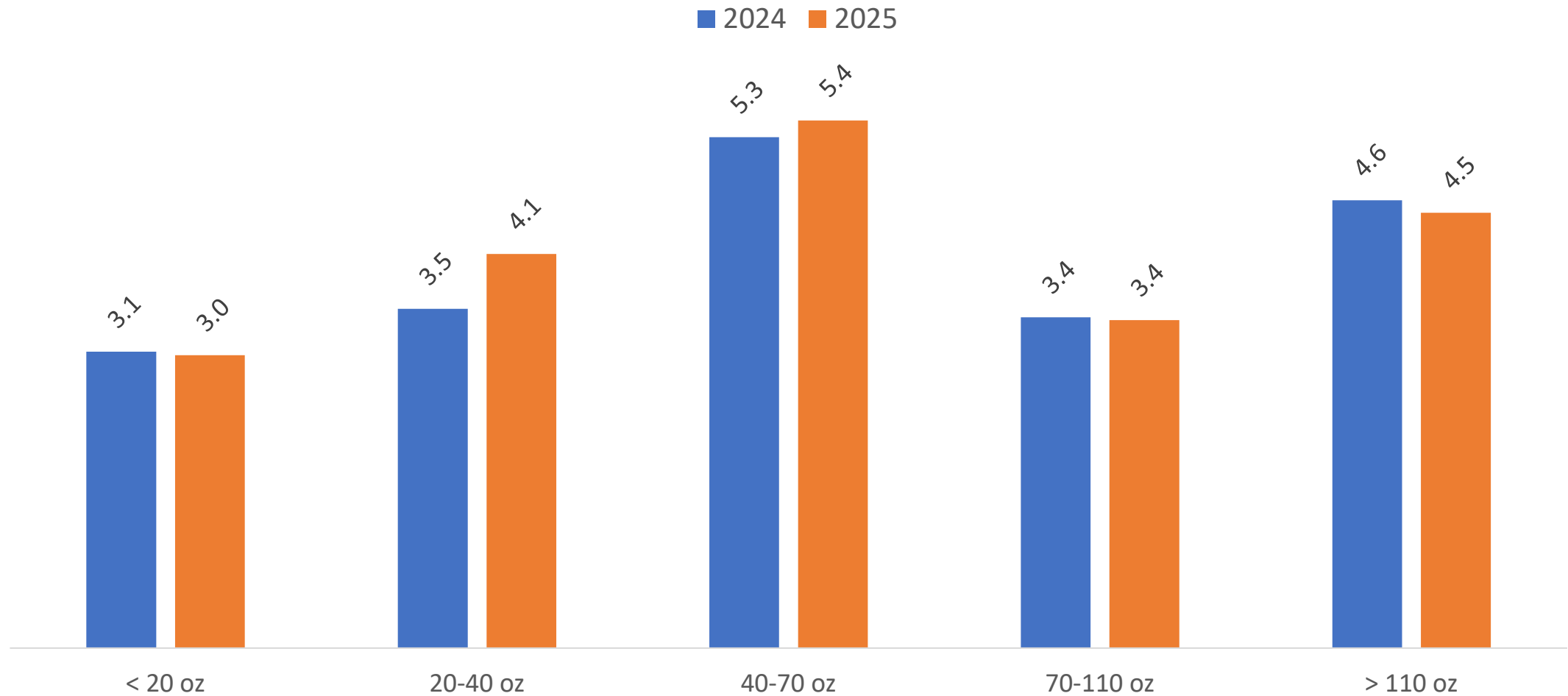
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF NFC Purchase Frequency by Size



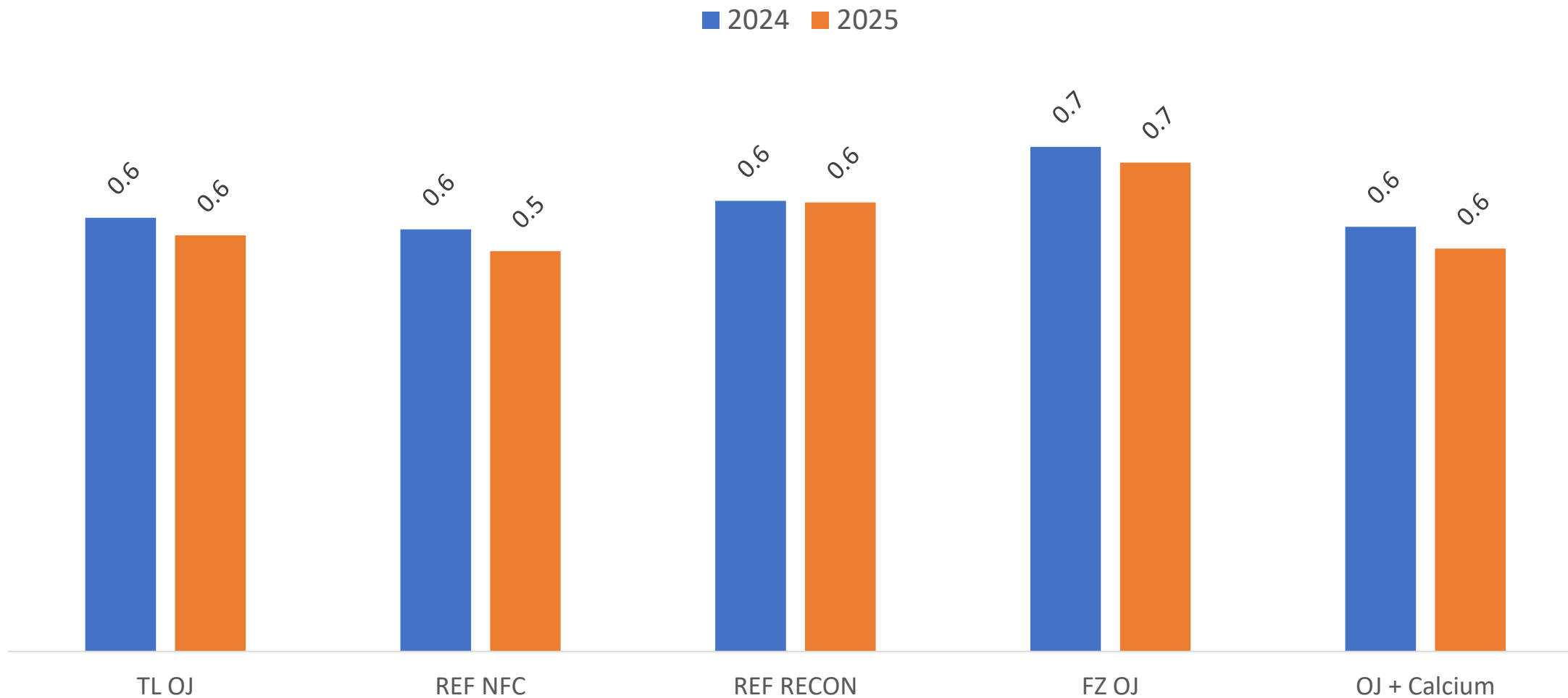
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF RECON Purchase Frequency by Size



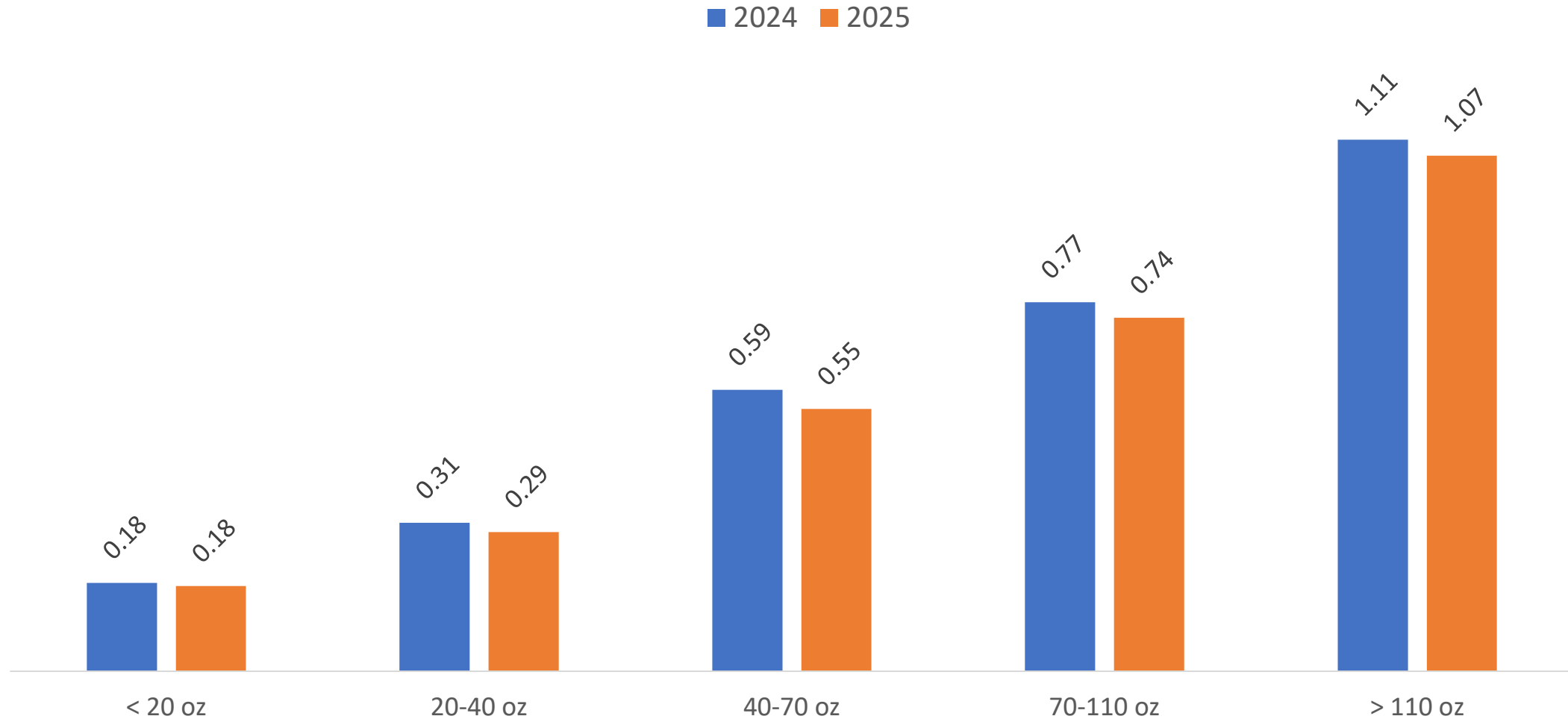
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –Purchase Size



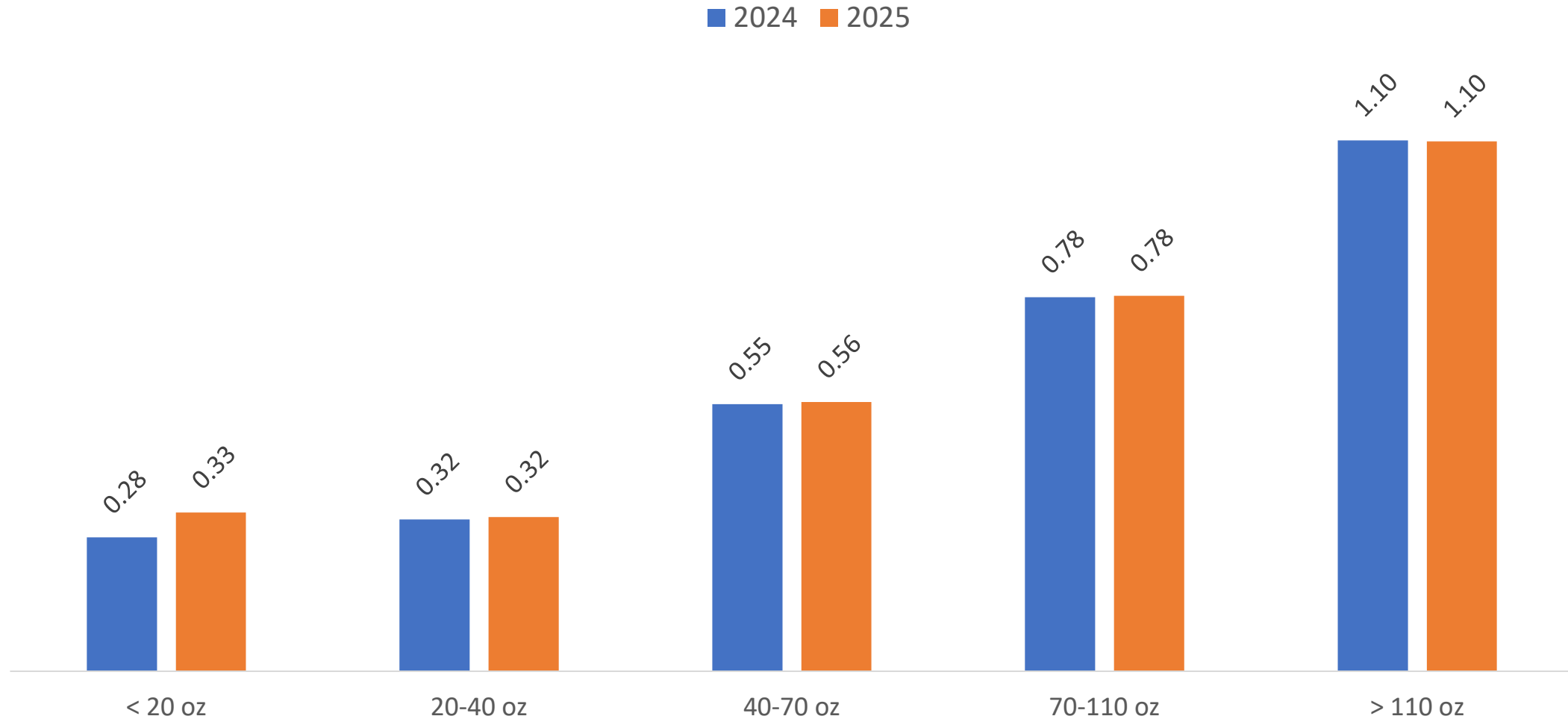
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF NFC Purchase Size by Container Size



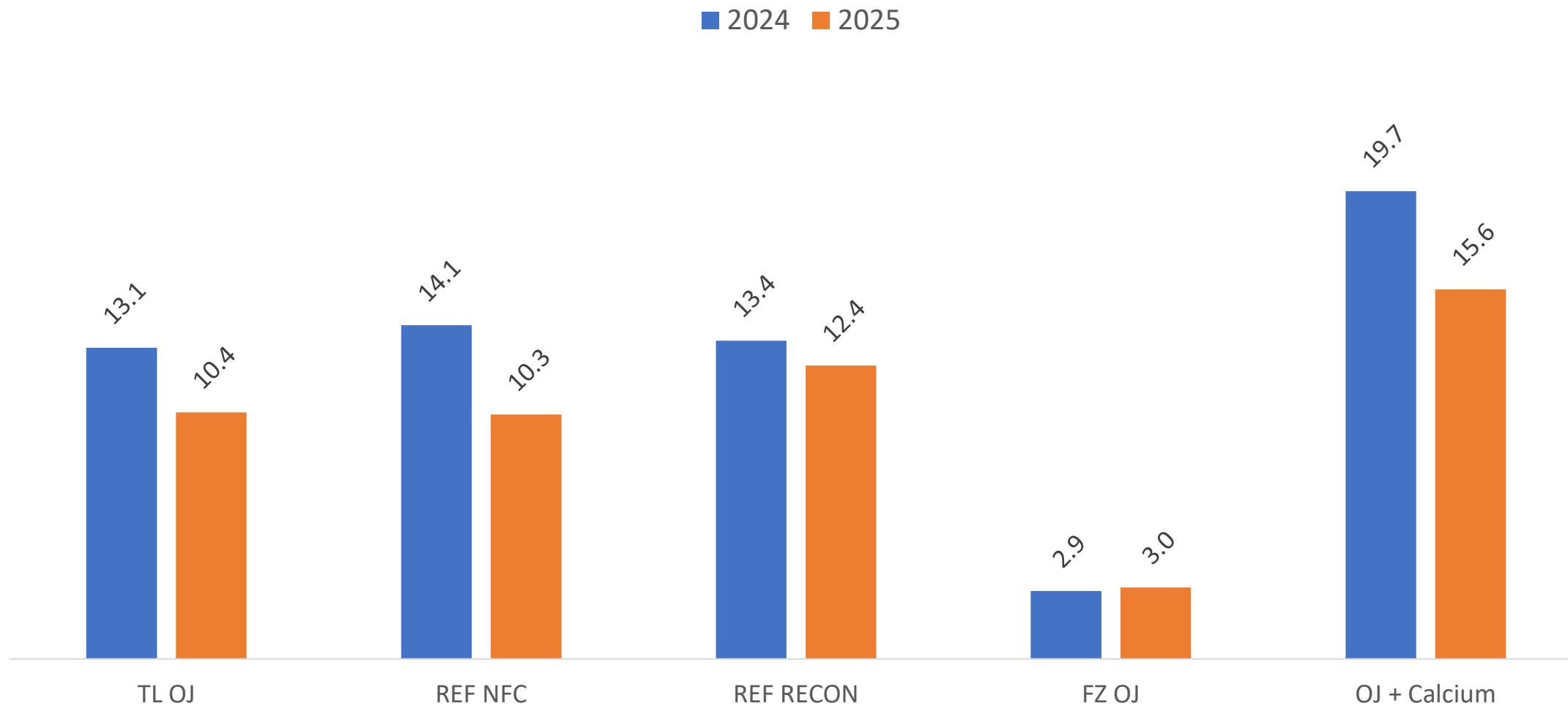
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – REF RECON Purchase Size by Container Size



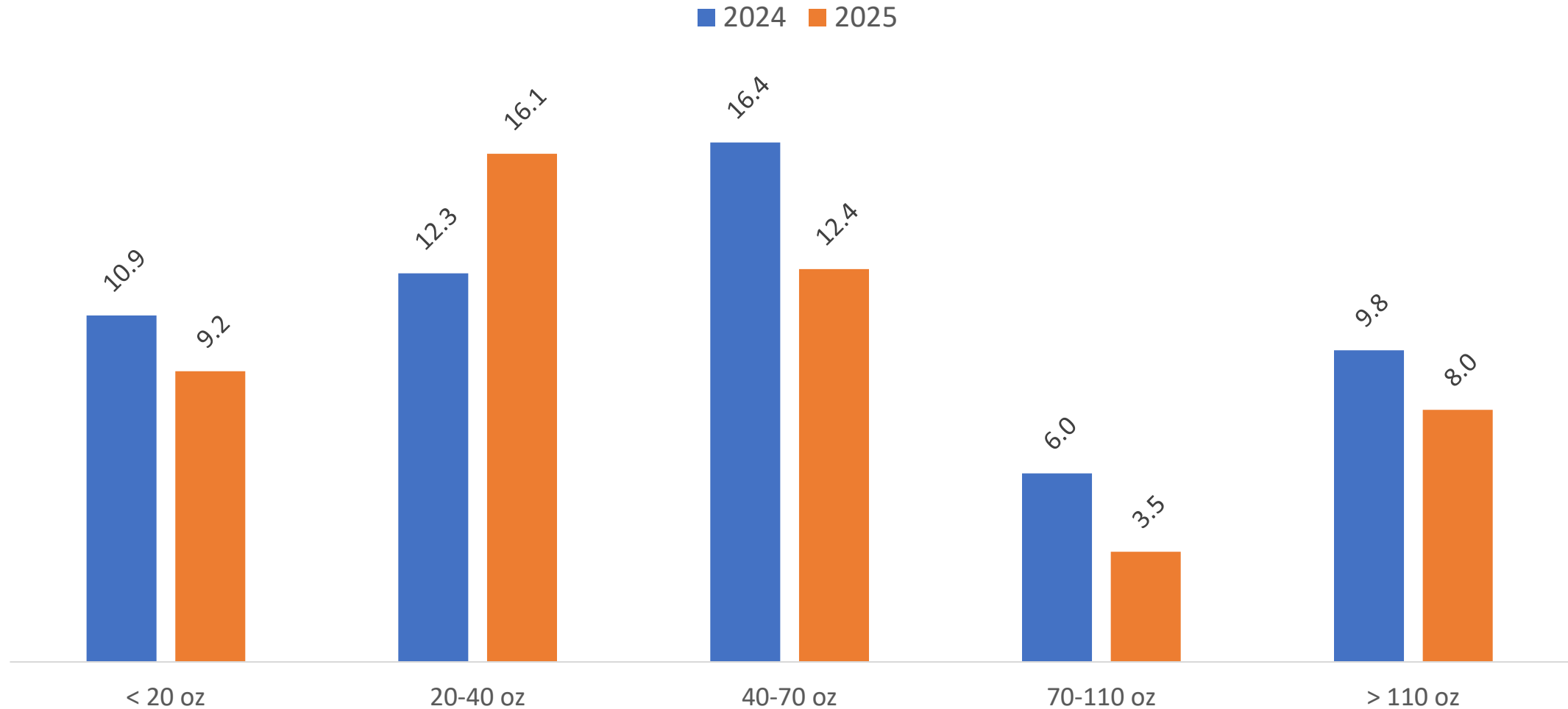
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –% Purchased on Any Perceived Deal



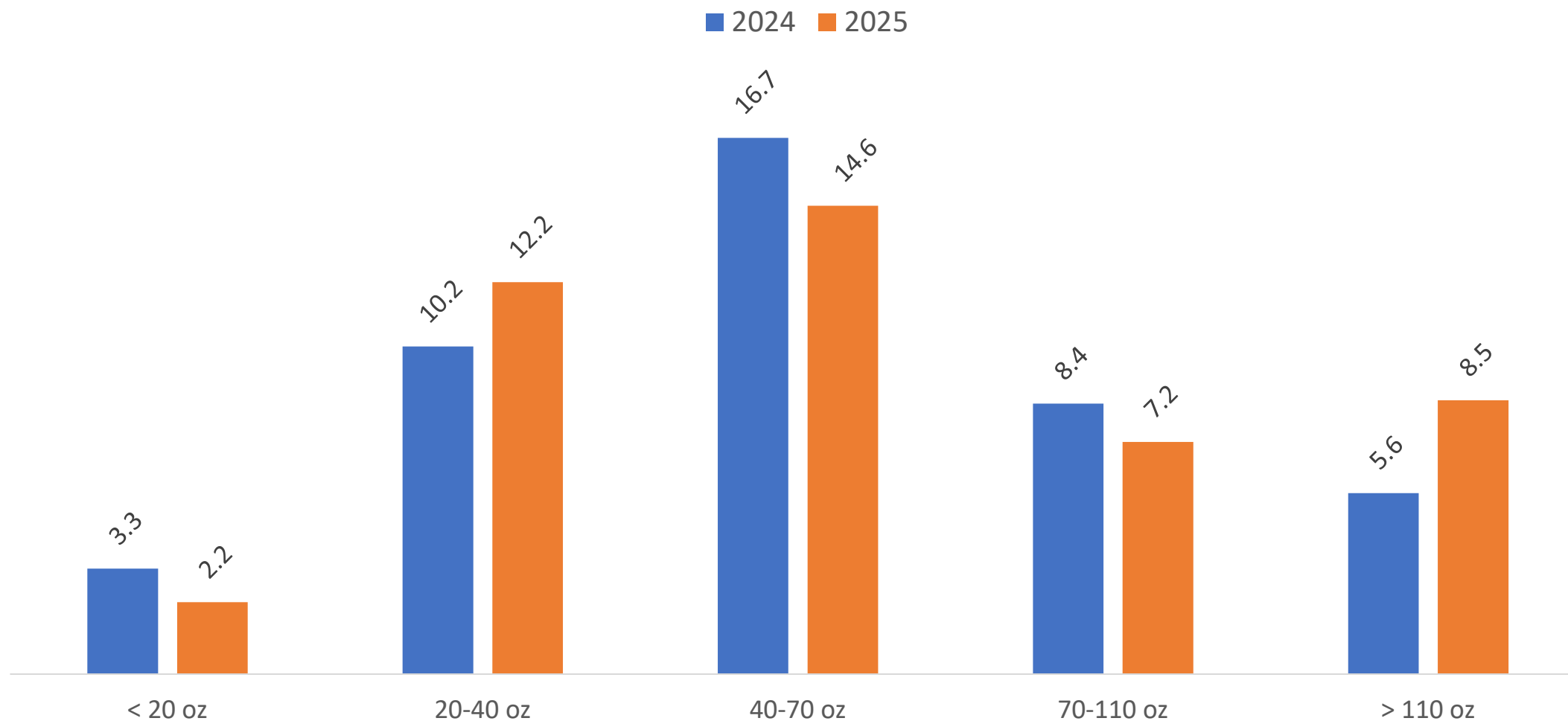
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –REF NFC % Purchased on Any Perceived Deal by Container Size



Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –REF RECON % Purchased on Any Perceived Deal by Container Size



Source: Nielsen Homescan data for Y/E Dec 2025



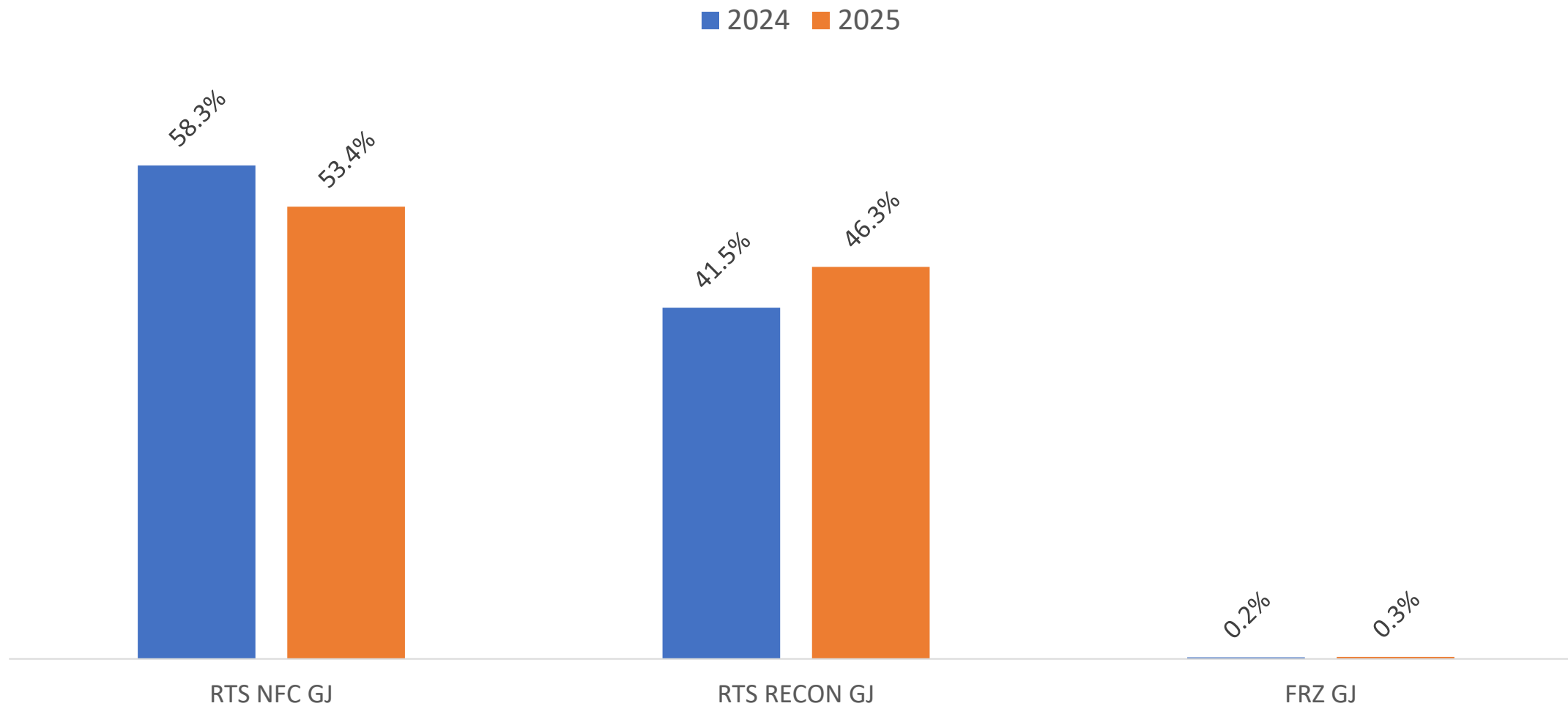
Grapefruit Juice Purchasing Review

GJ HH Purchasing Trends

Year	Household Penetration	Buying Rate*	Purchase Frequency*	% Purchased on Perceived Deal
2011	5.5	2.0	3.2	24
2012	5.5	1.9	2.9	24
2013	5.1	1.9	2.9	25
2014	4.7	1.8	2.9	27
2015	4.2	2.0	3.2	27
2016	4.3	1.9	3.1	28
2017	4.2	1.7	2.8	29
2018	3.9	1.7	2.9	28
2019	3.7	1.6	3.0	21
2020	4.0	1.6	3.1	20
2021	3.3	1.7	3.1	19
2022	3.7	1.7	3.1	18
2023	3.7	1.7	3.1	19
2024*	3.2	2.6	4.7	16
2025*	3.0	2.5	4.8	16

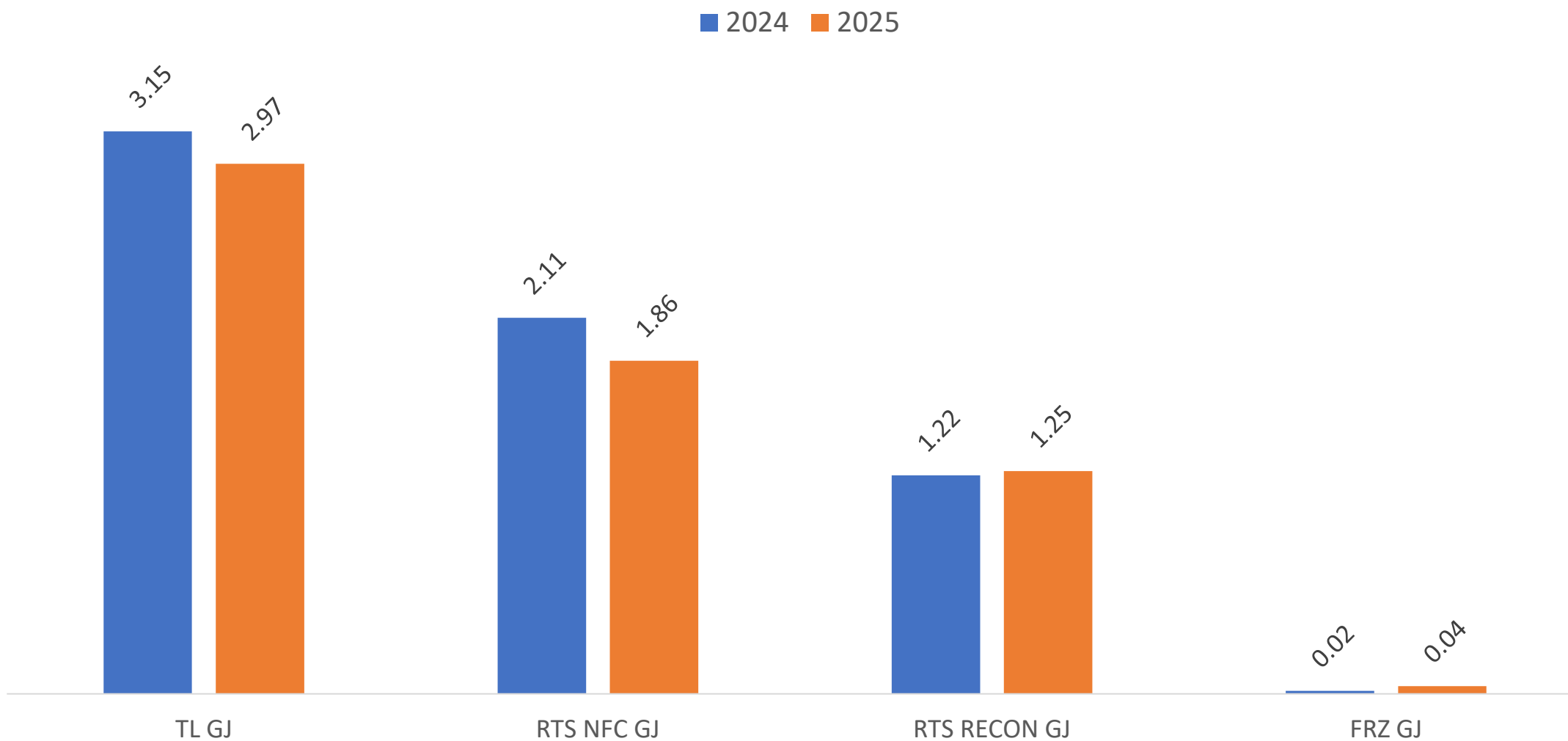
Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice –% Share



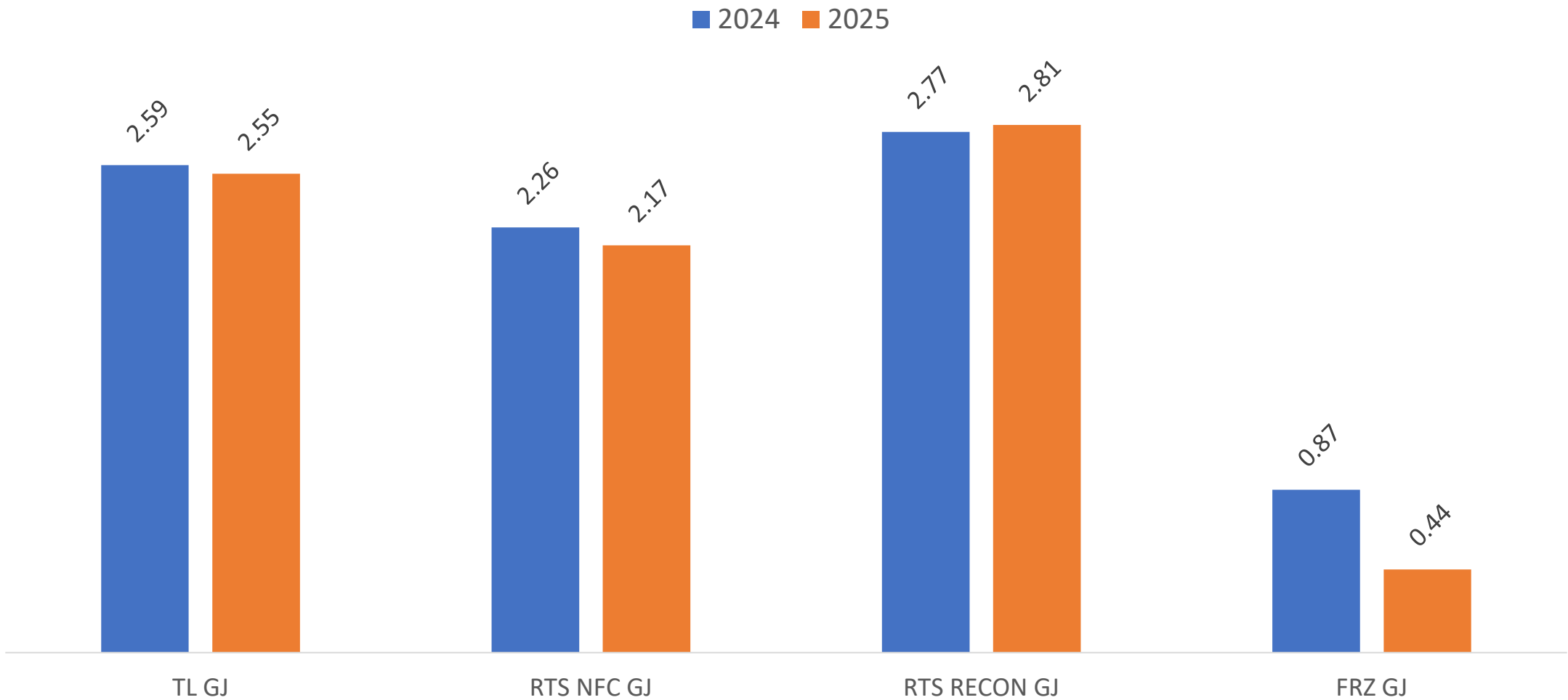
Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice – Penetration



Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice – Buying Rate



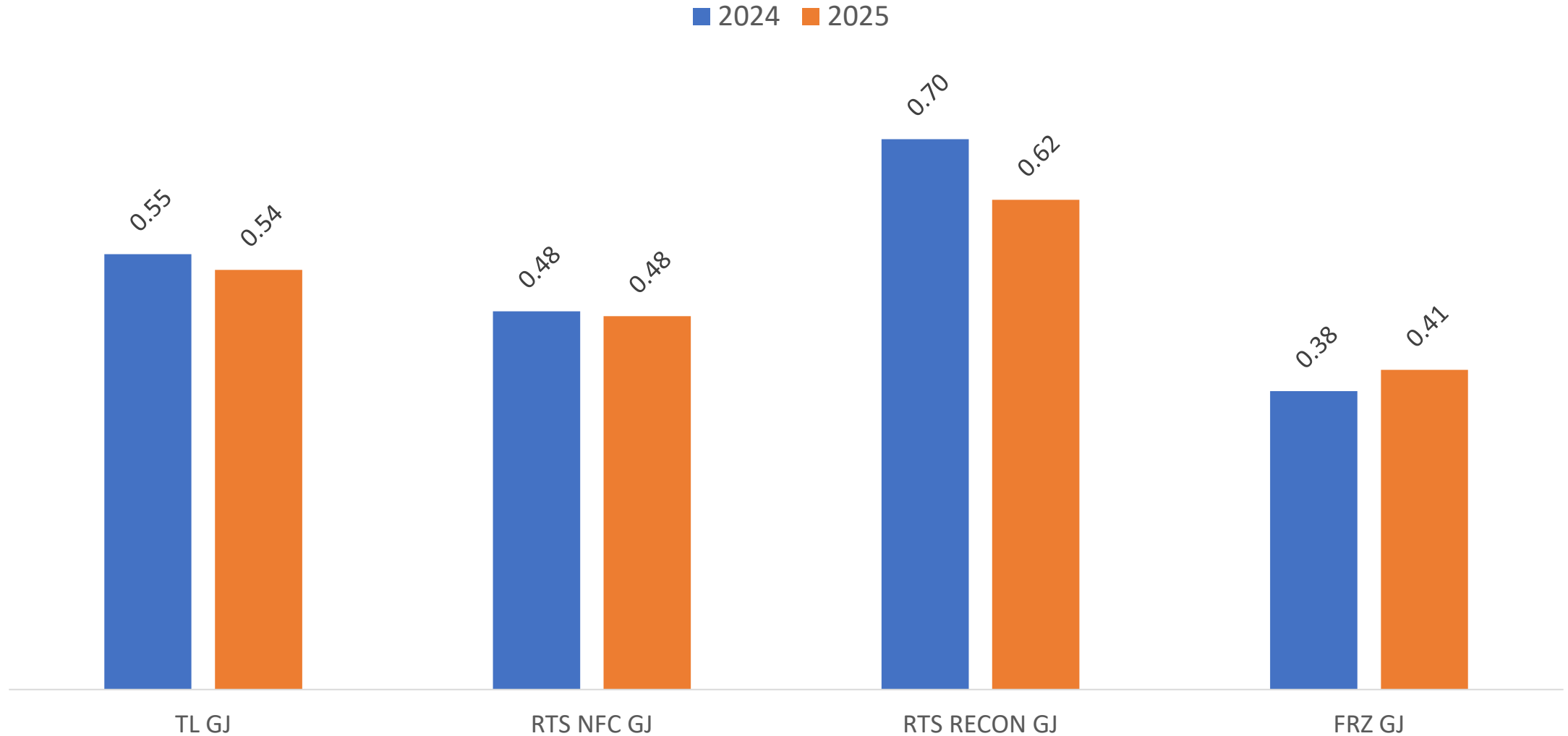
Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice – Purchase Frequency



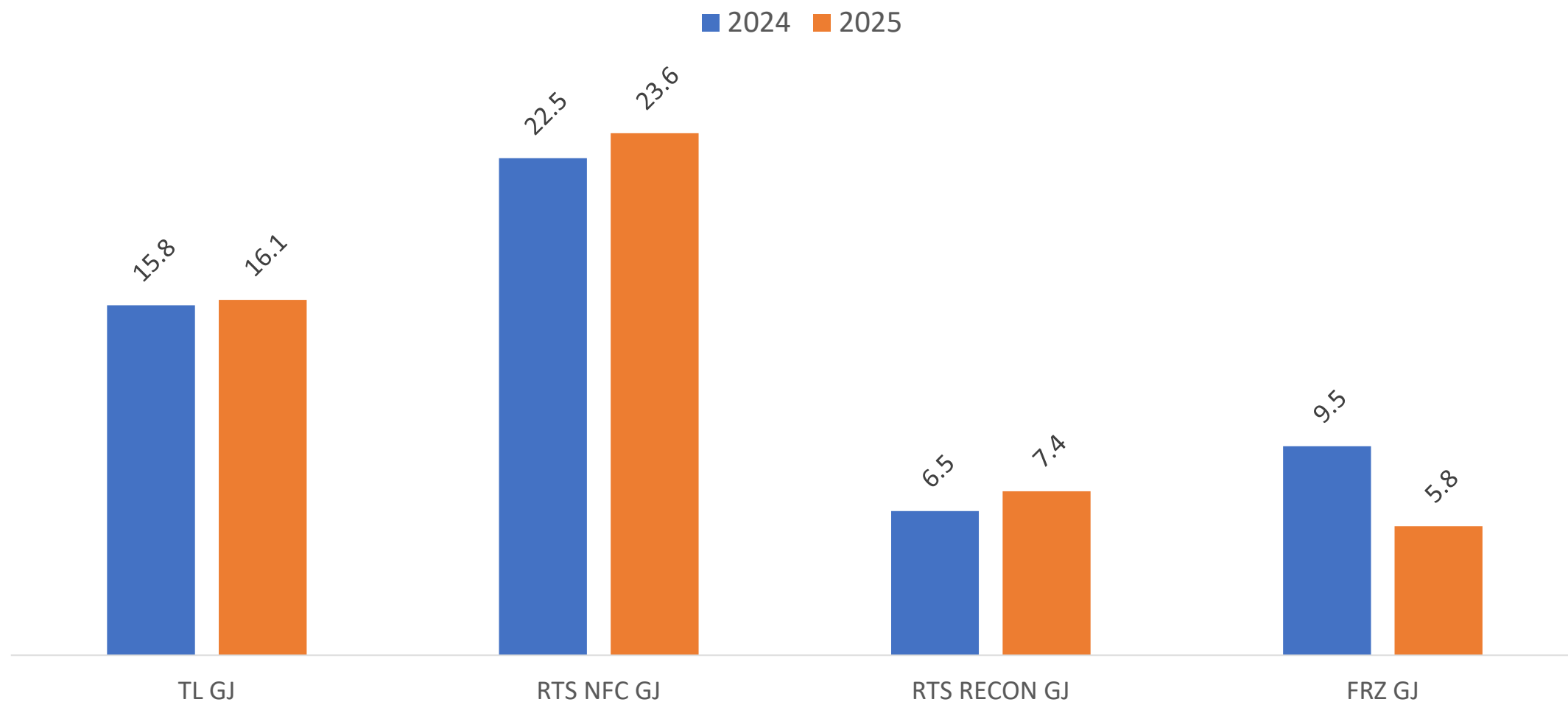
Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice – Purchase Size



Source: Nielsen Homescan data for Y/E Dec 2025

Grapefruit Juice –% Purchased on Any Perceived Deal

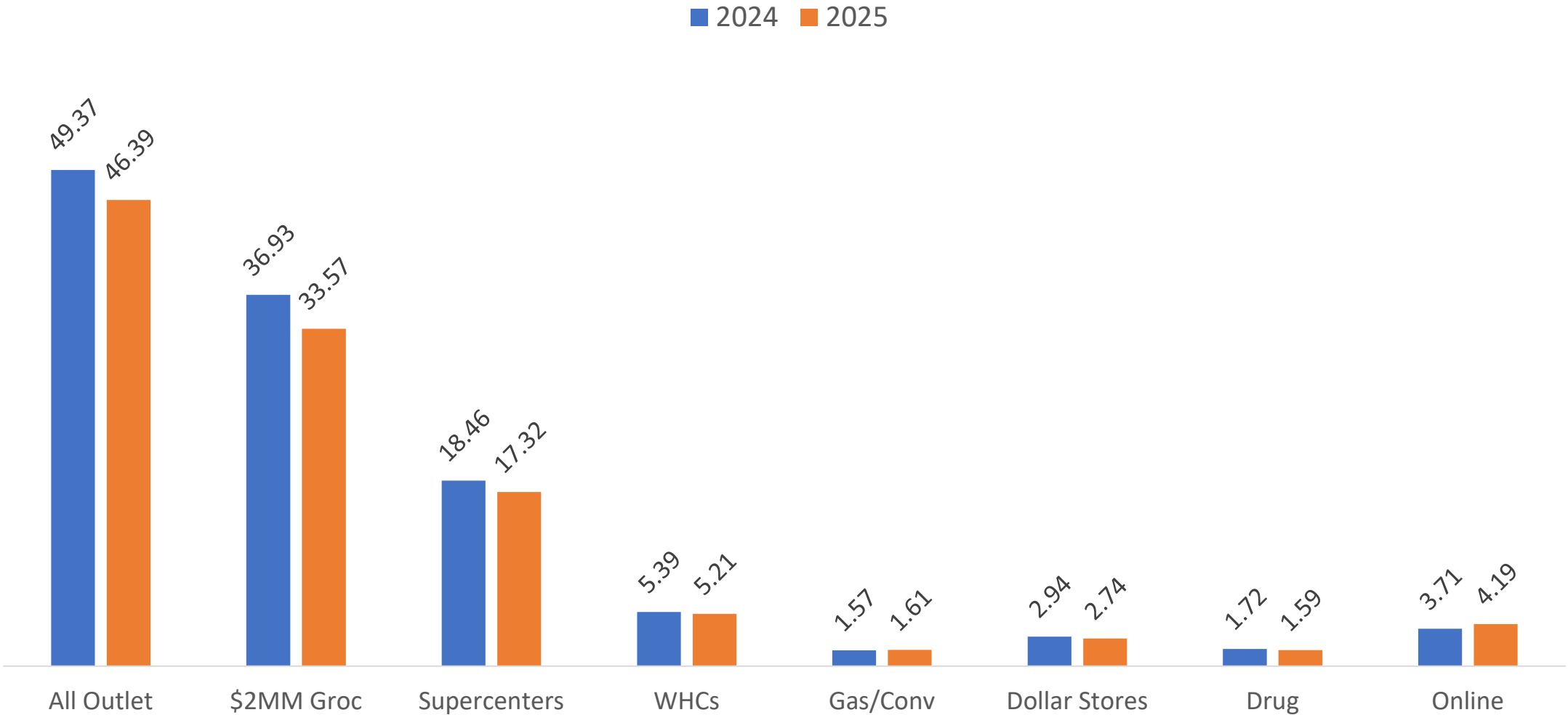


Source: Nielsen Homescan data for Y/E Dec 2025

The image features a minimalist design with two stylized, light gray hands. One hand is positioned in the upper left corner, holding a solid orange circle. The other hand is in the lower right corner, also holding a solid orange circle. The text 'Orange Juice Purchasing by Channel of Trade' is centered between these two hands in a bold, dark green font.

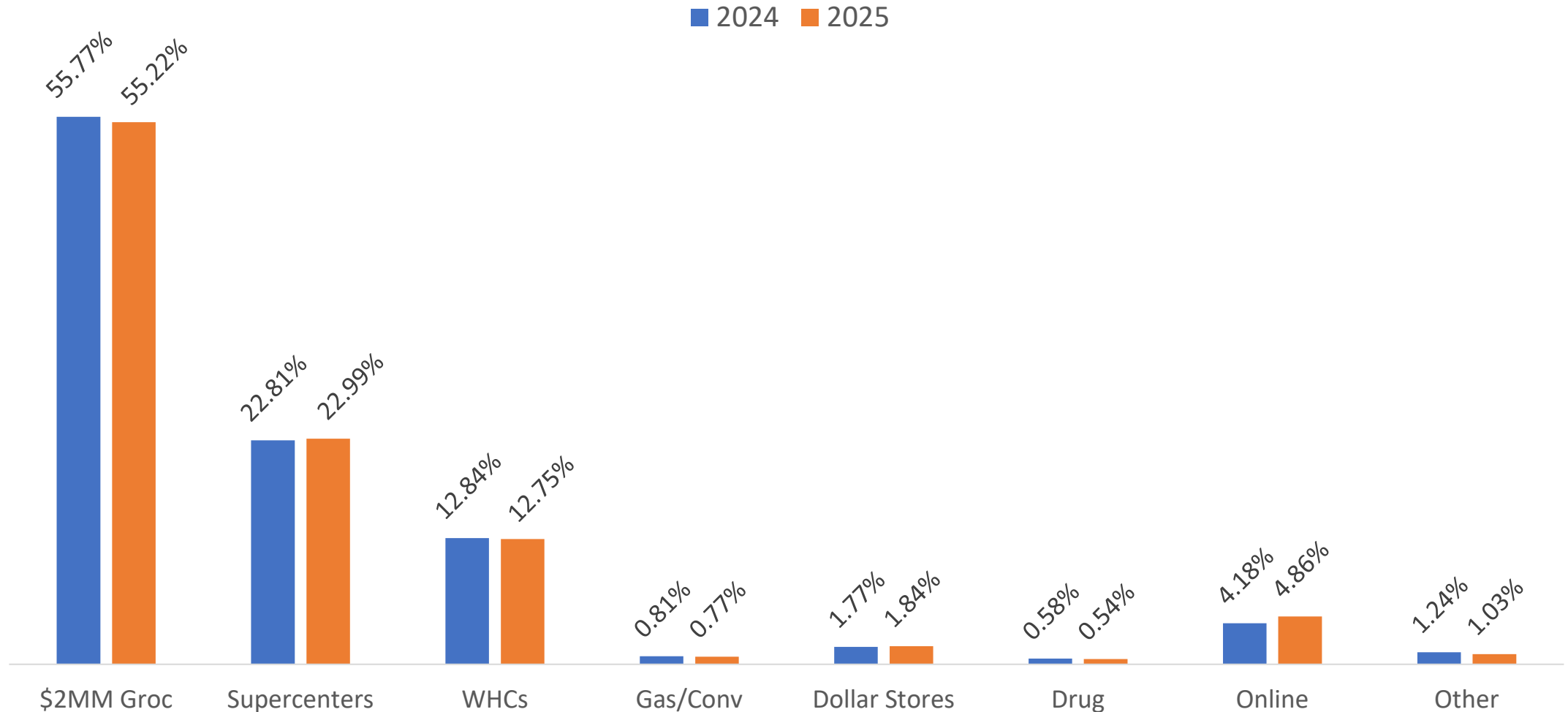
Orange Juice Purchasing by Channel of Trade

Orange Juice – Penetration by Channel



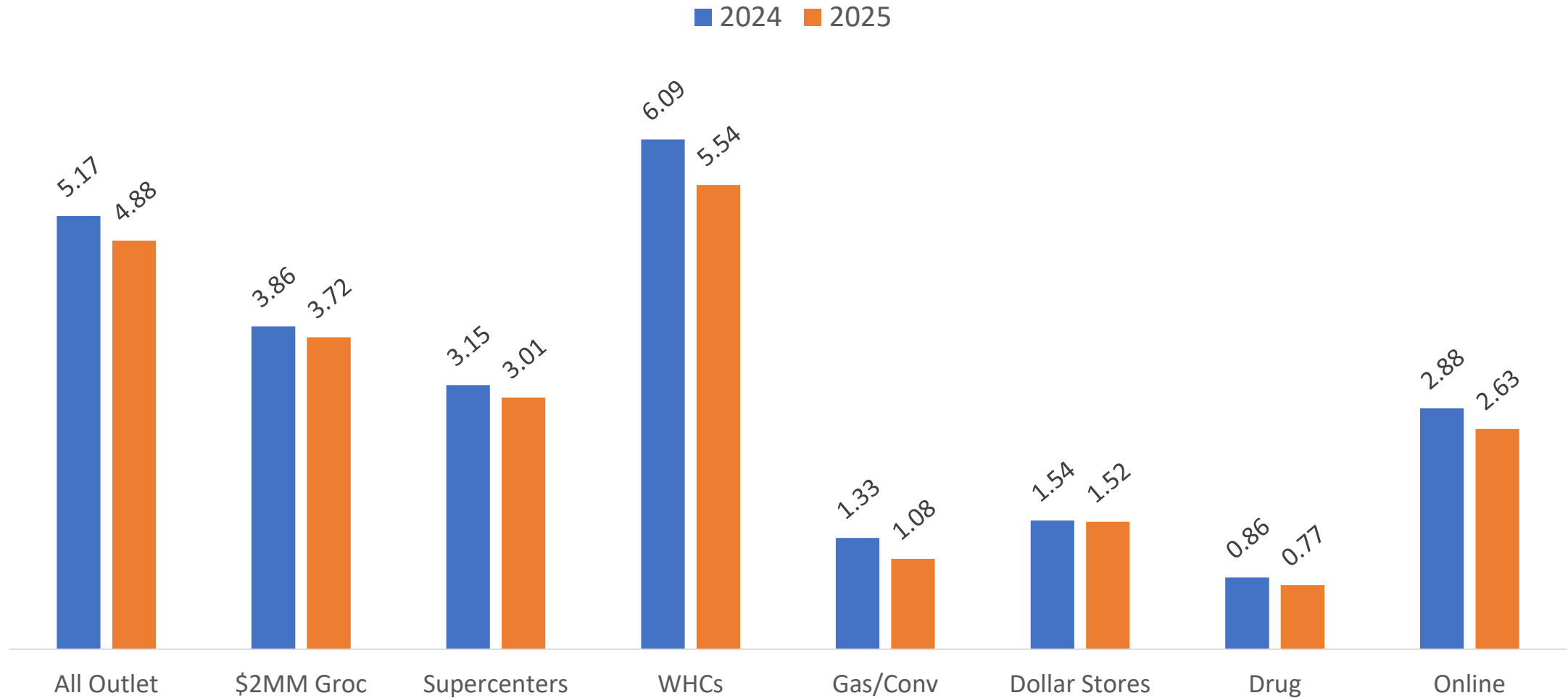
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice – Volume Share by Channel



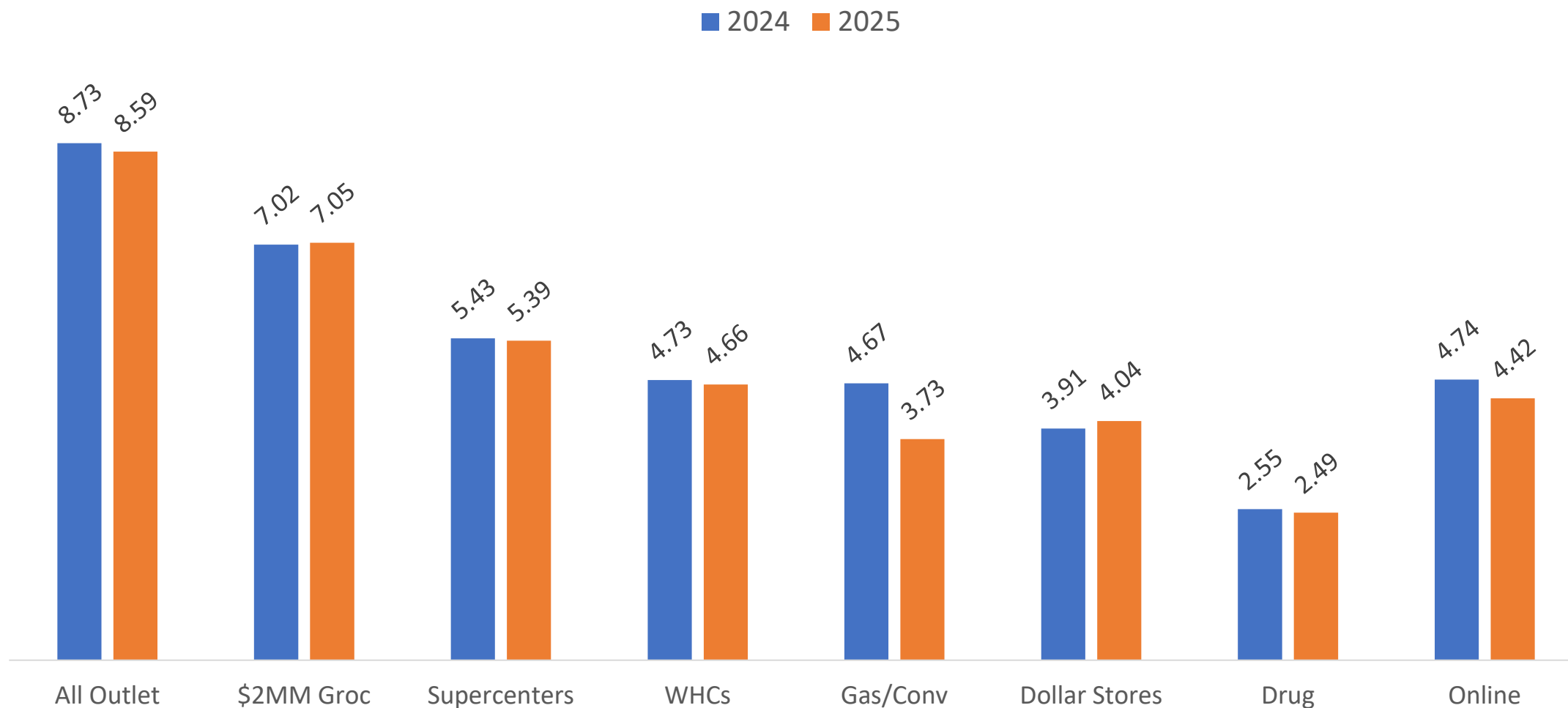
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –Buying Rate by Channel



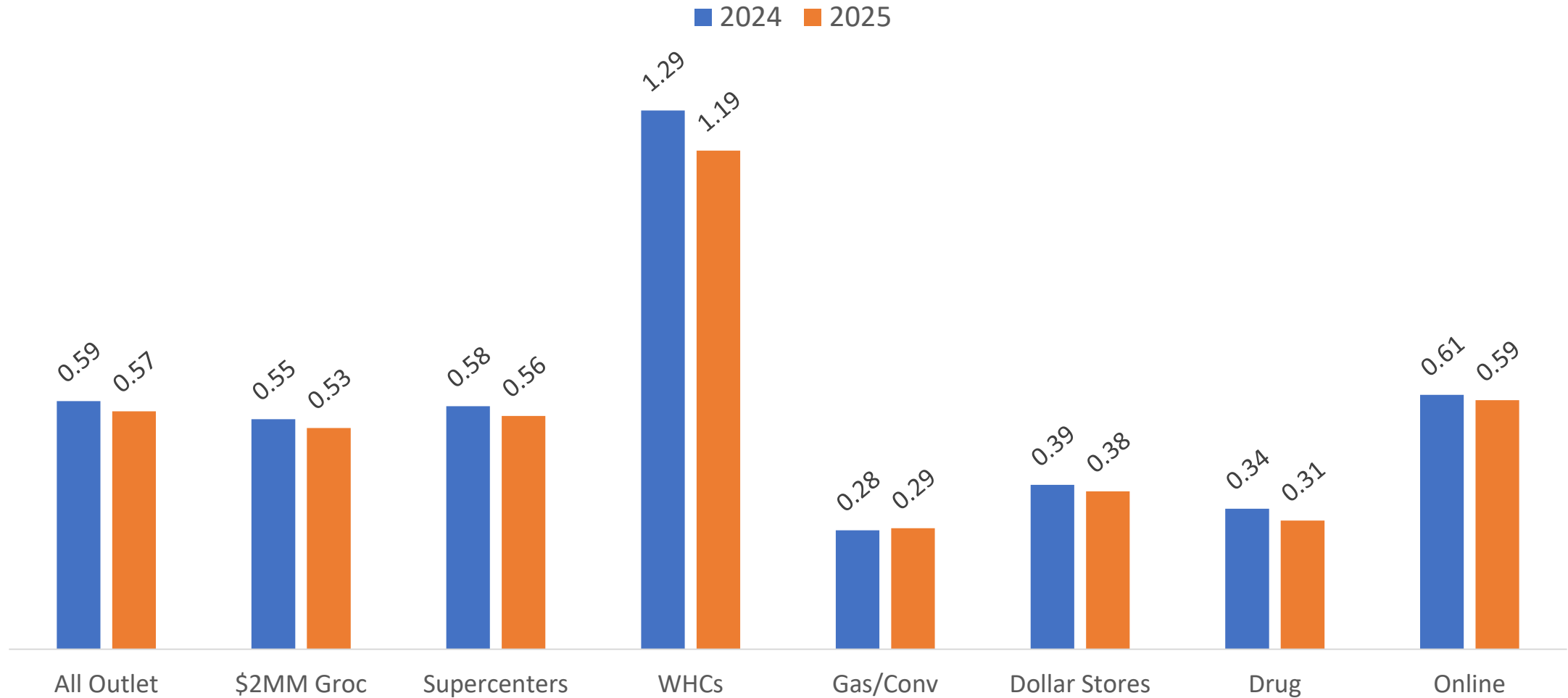
Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –Purchase Frequency by Channel



Source: Nielsen Homescan data for Y/E Dec 2025

Orange Juice –Purchase Size by Channel



Source: Nielsen Homescan data for Y/E Dec 2025

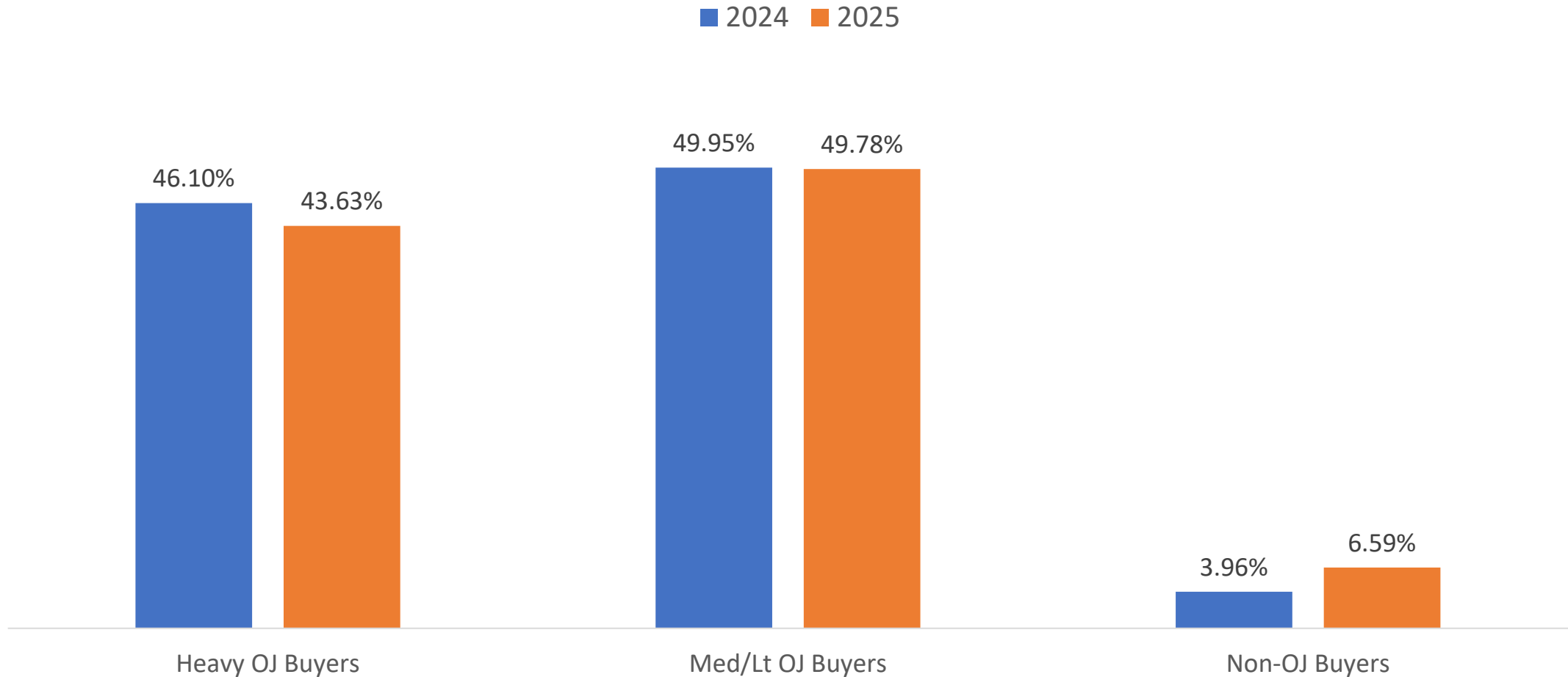
The image features two stylized, light gray hands. The hand on the left is positioned in the upper left corner, holding a solid orange circle. The hand on the right is positioned in the lower right corner, also holding a solid orange circle. The central text is placed between these two hands.

Orange Juice: Heavy, Medium/Light, and Non-Buyers

Definitions of OJ Buyers

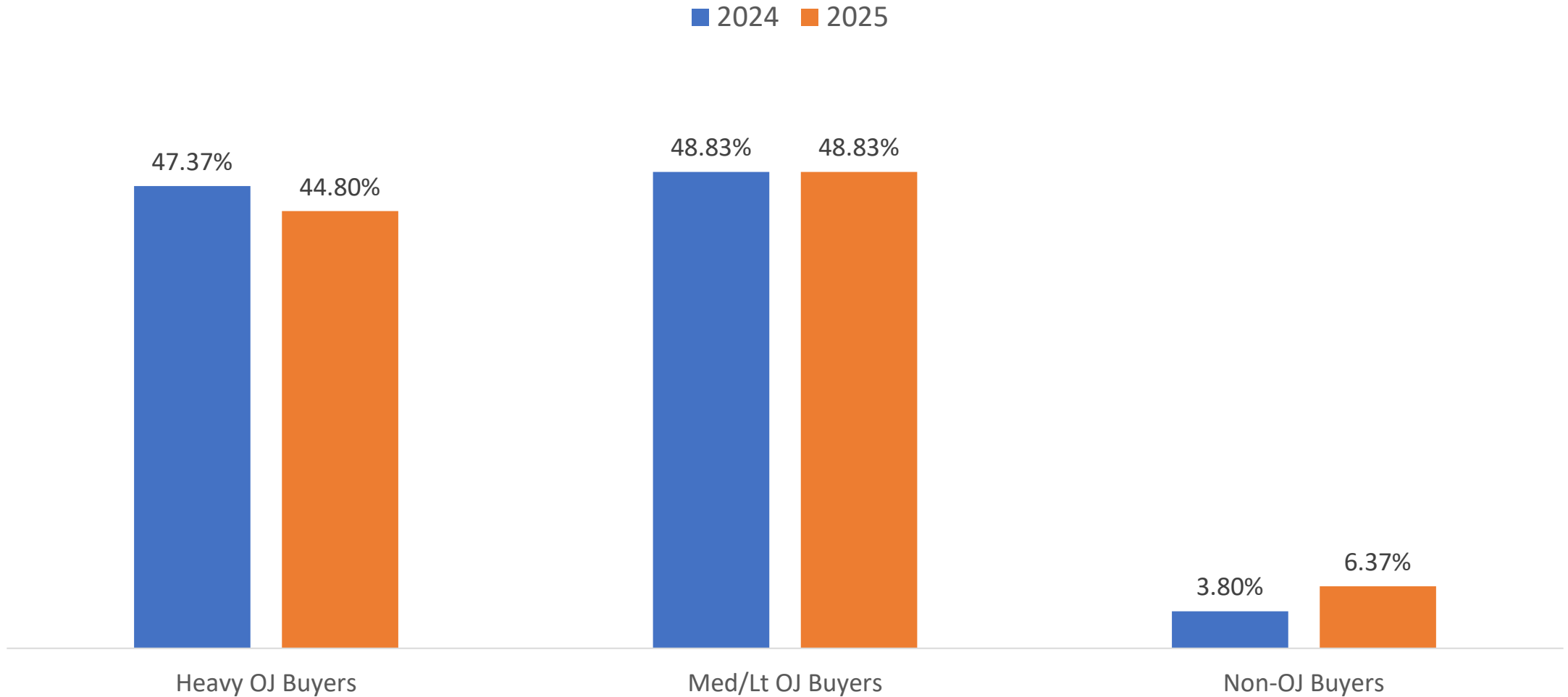
- For this analysis, three OJ Buyer groups are considered:
 - HEAVY OJ BUYER – *Household buys more than 10 gallons of OJ per year*
 - MED/LT OJ BUYER – *Household buys 10 gallons or less OJ per year*
 - NON-BUYER – *Household did not report more than one OJ purchase in 2025 within the retail outlets covered by the Market Summary Report*

OJ Buying HHs (All OJ) Share of Households



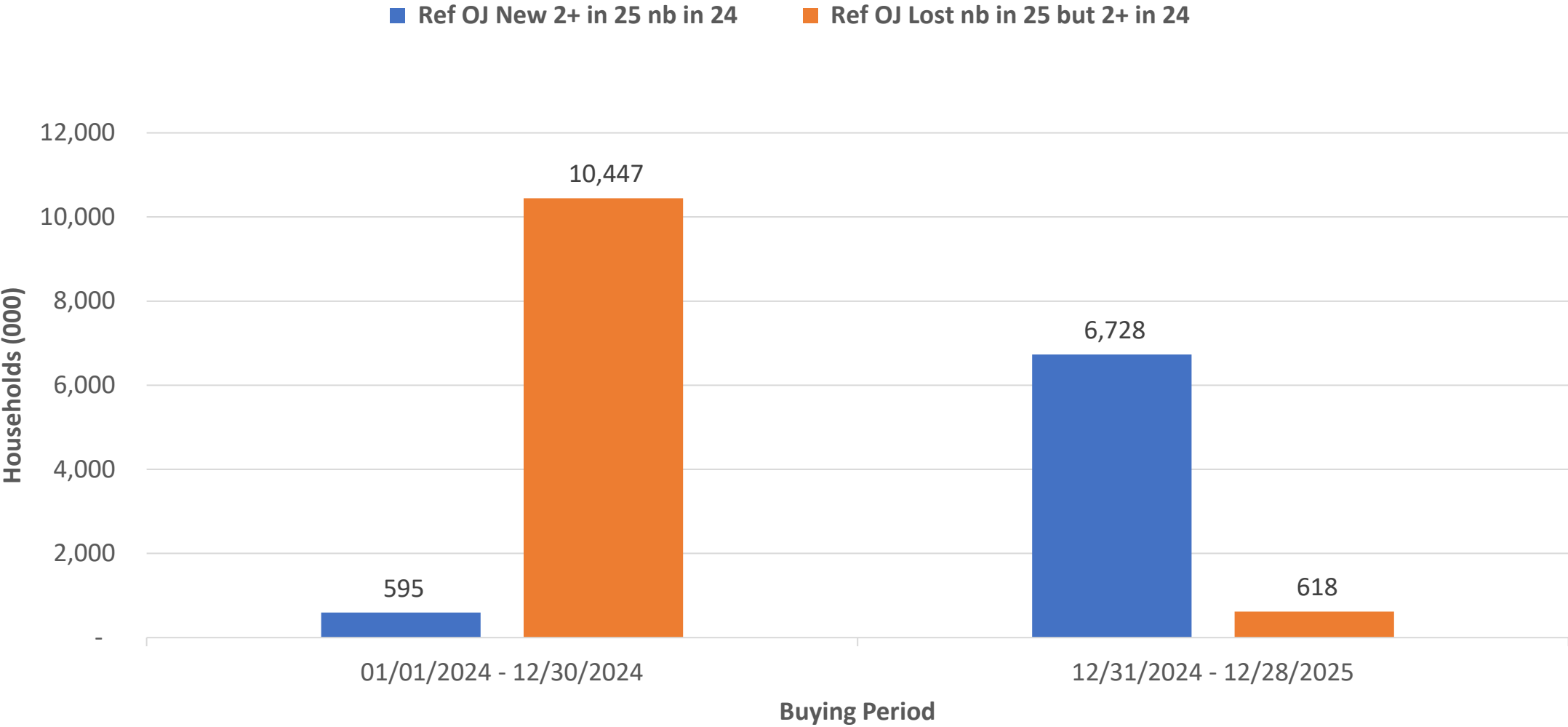
Source: Nielsen Homescan data for Y/E Dec 2025

OJ Buying HHs (REF OJ) Share of Households



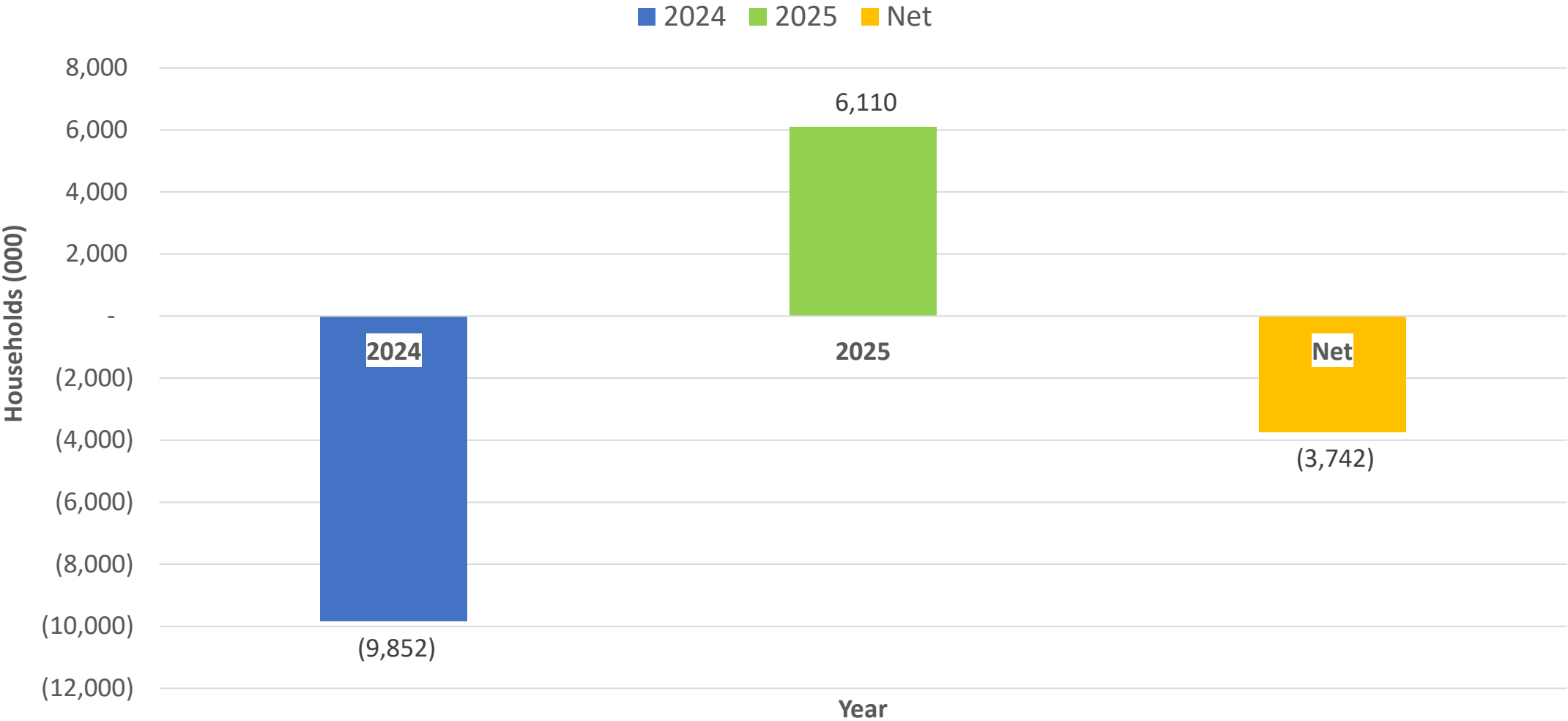
Source: Nielsen Homescan data for Y/E Dec 2025

Non-OJ Buying HHs (All OJ)



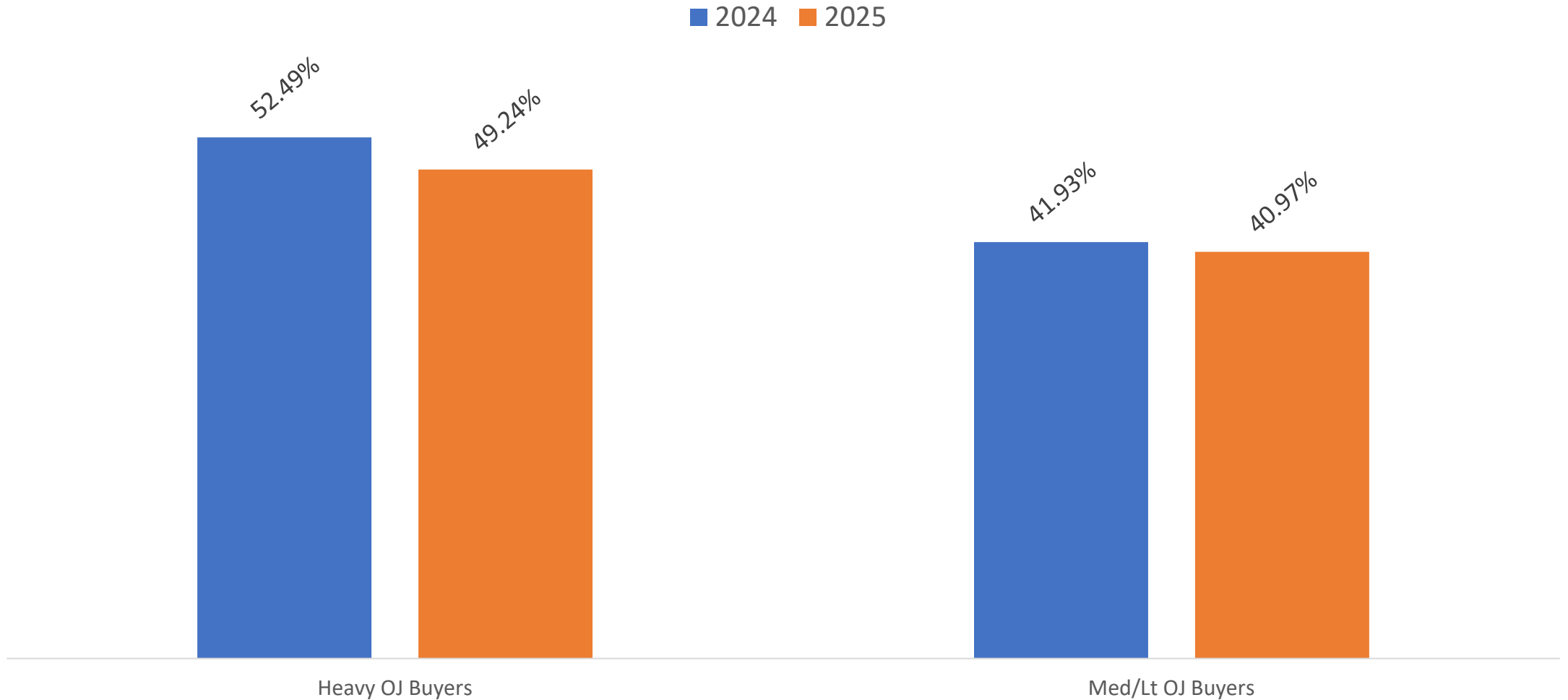
Source: Nielsen Homescan data for Y/E Dec 2025

Non-OJ Buying HHs (All OJ)



Source: Nielsen Homescan data for Y/E Dec 2025

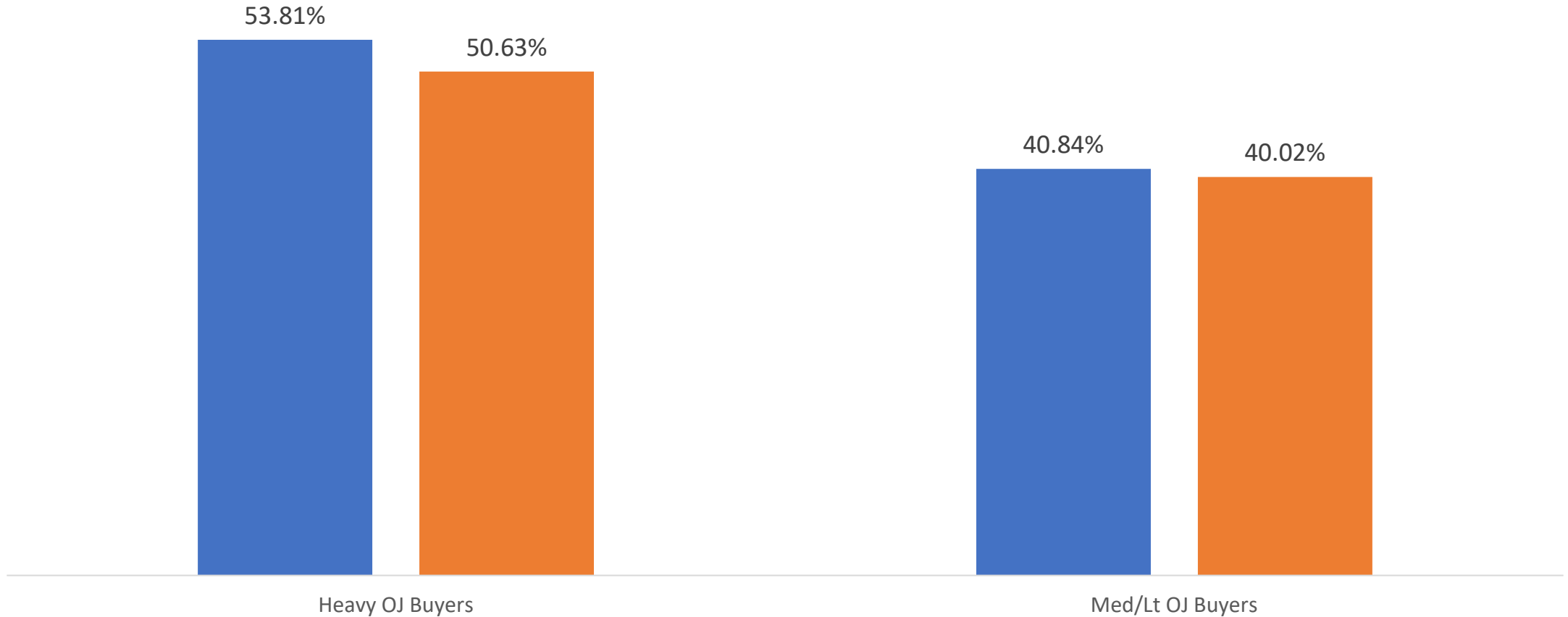
OJ Buying HHs (All OJ) Share of Gallons Purchased



Source: Nielsen Homescan data for Y/E Dec 2025

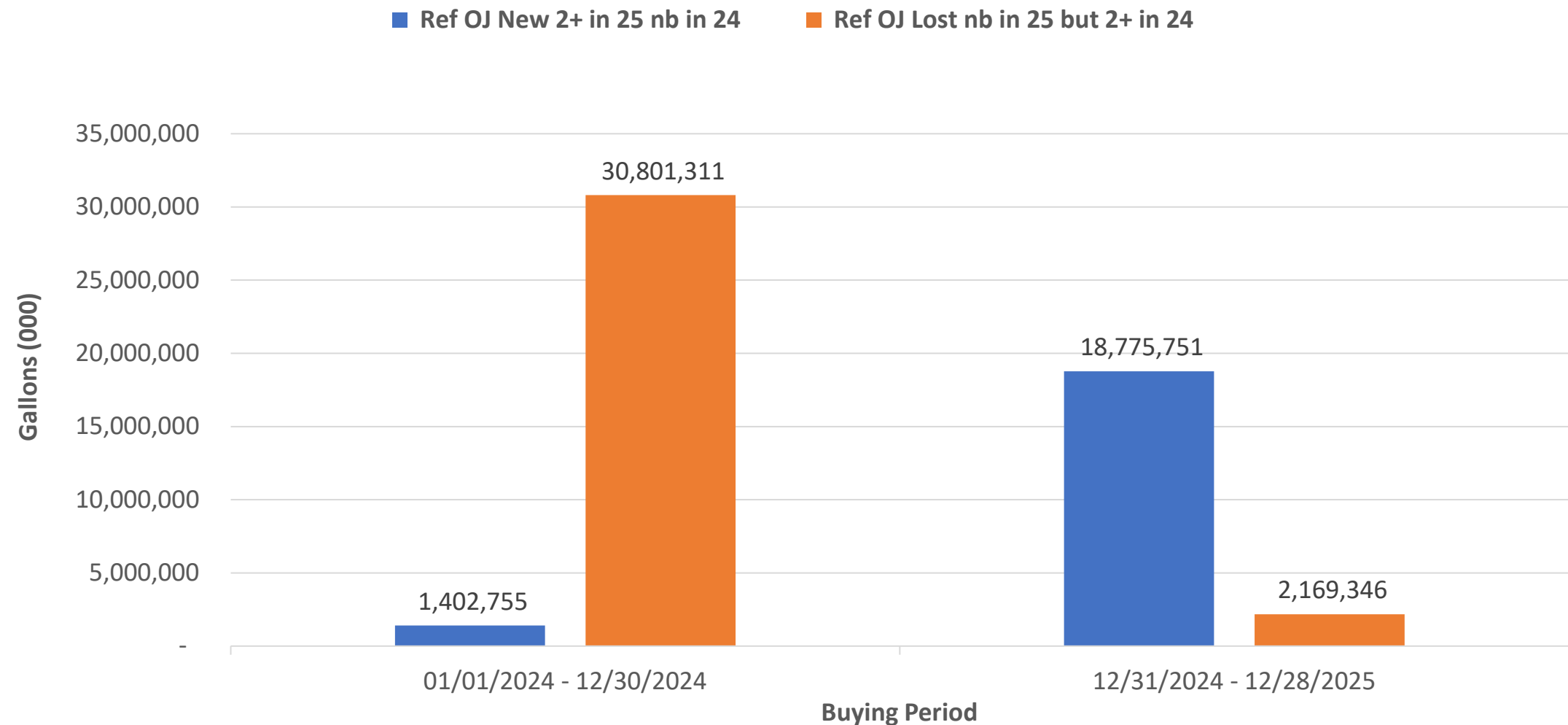
OJ Buying HHs (REF OJ) Share of Gallons Purchased

■ 2024 ■ 2025



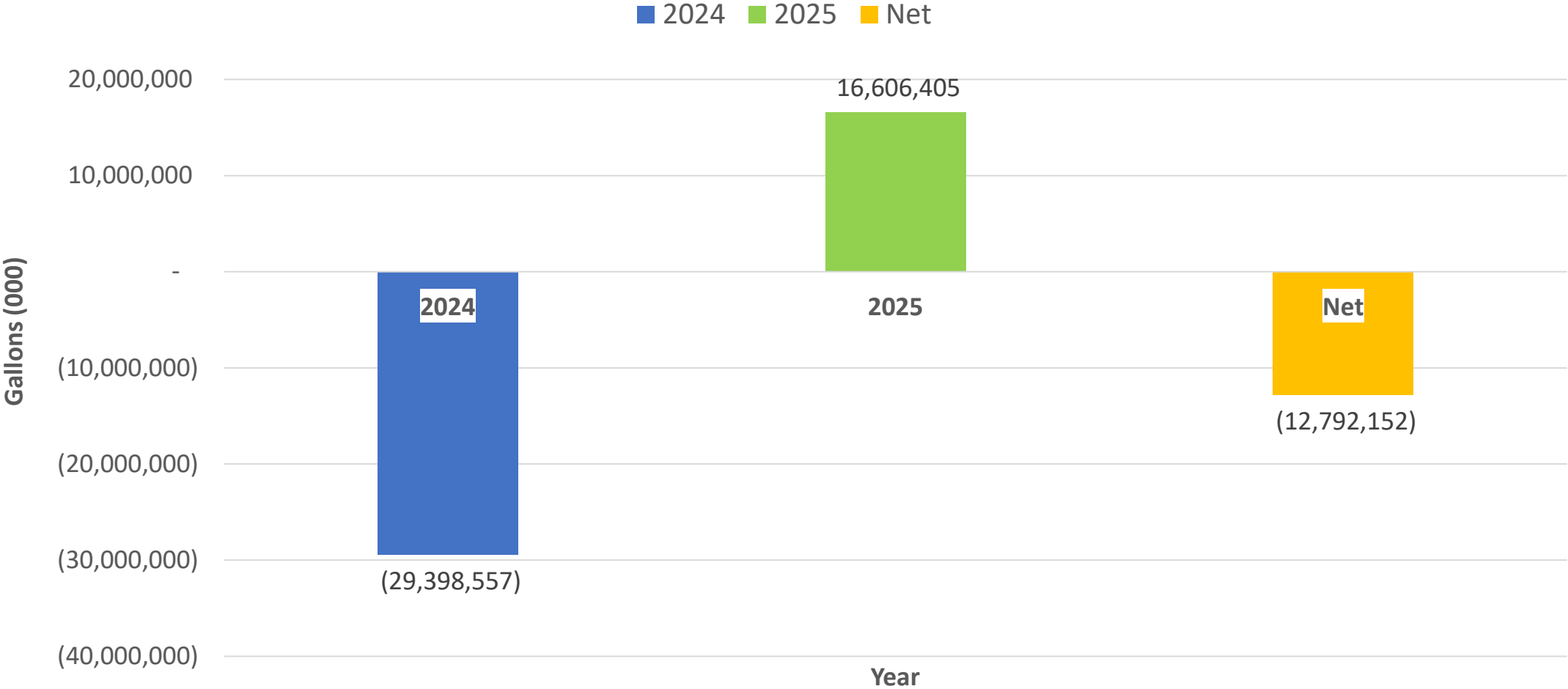
Source: Nielsen Homescan data for Y/E Dec 2025

Non-OJ Buying HHs (All OJ)



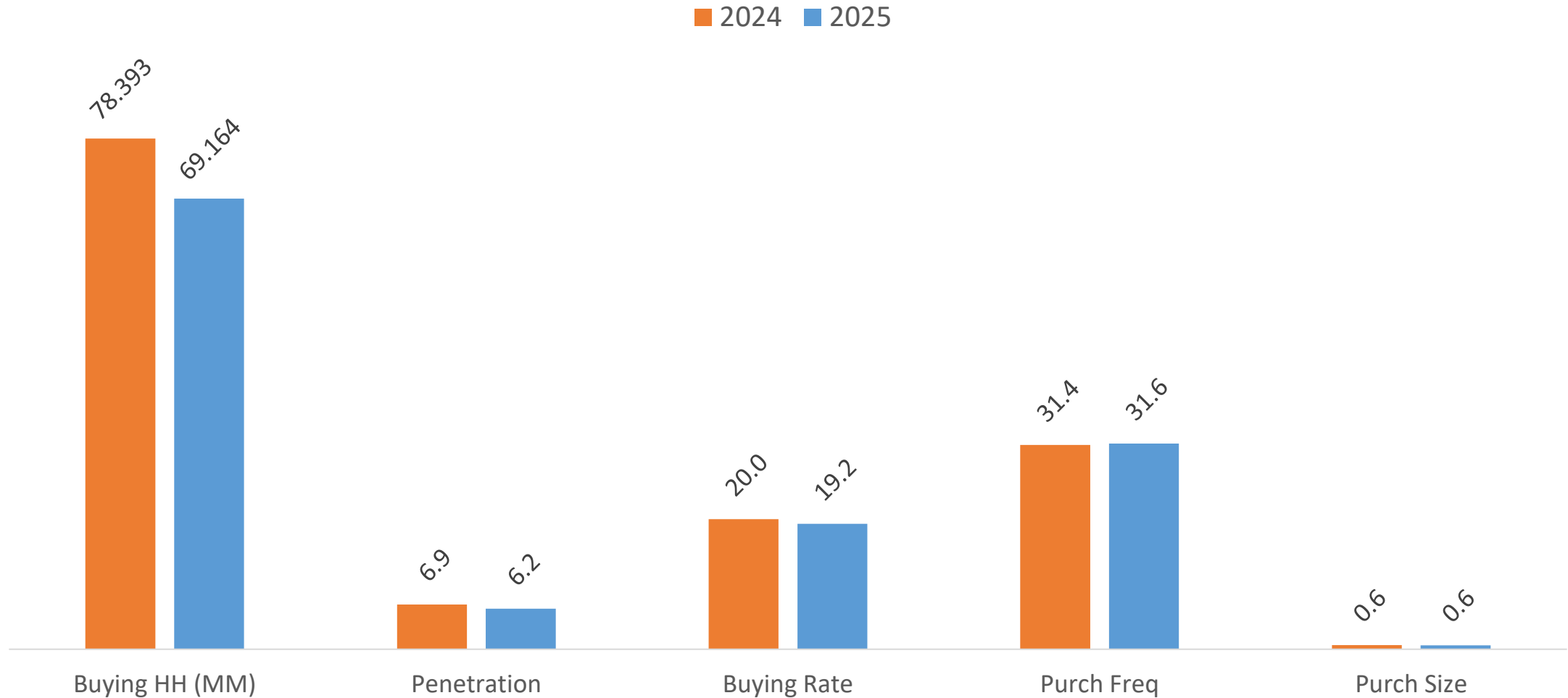
Source: Nielsen Homescan data for Y/E Dec 2025

Non-OJ Buying HHs (All OJ)



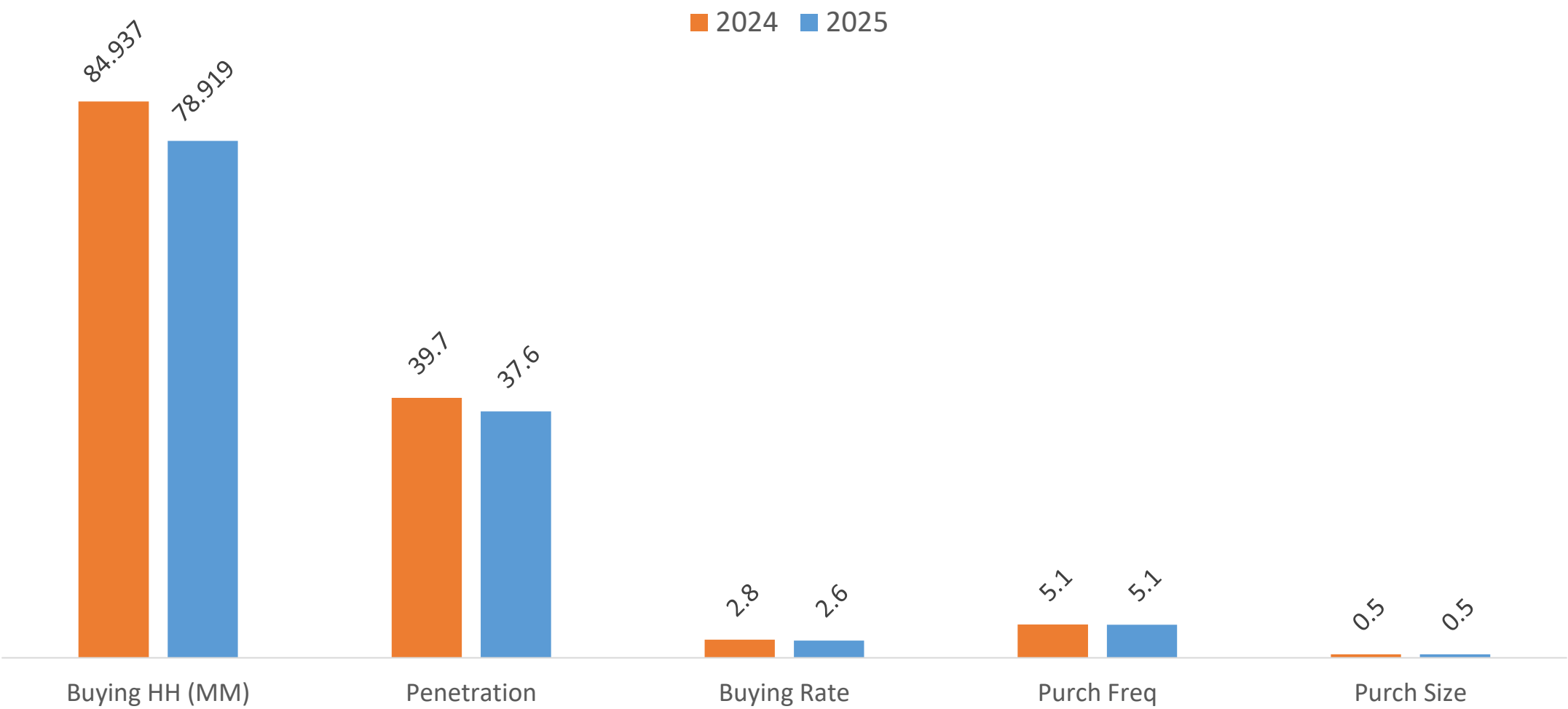
Source: Nielsen Homescan data for Y/E Dec 2025

Heavy OJ Buyers –OJ Purchasing Trends



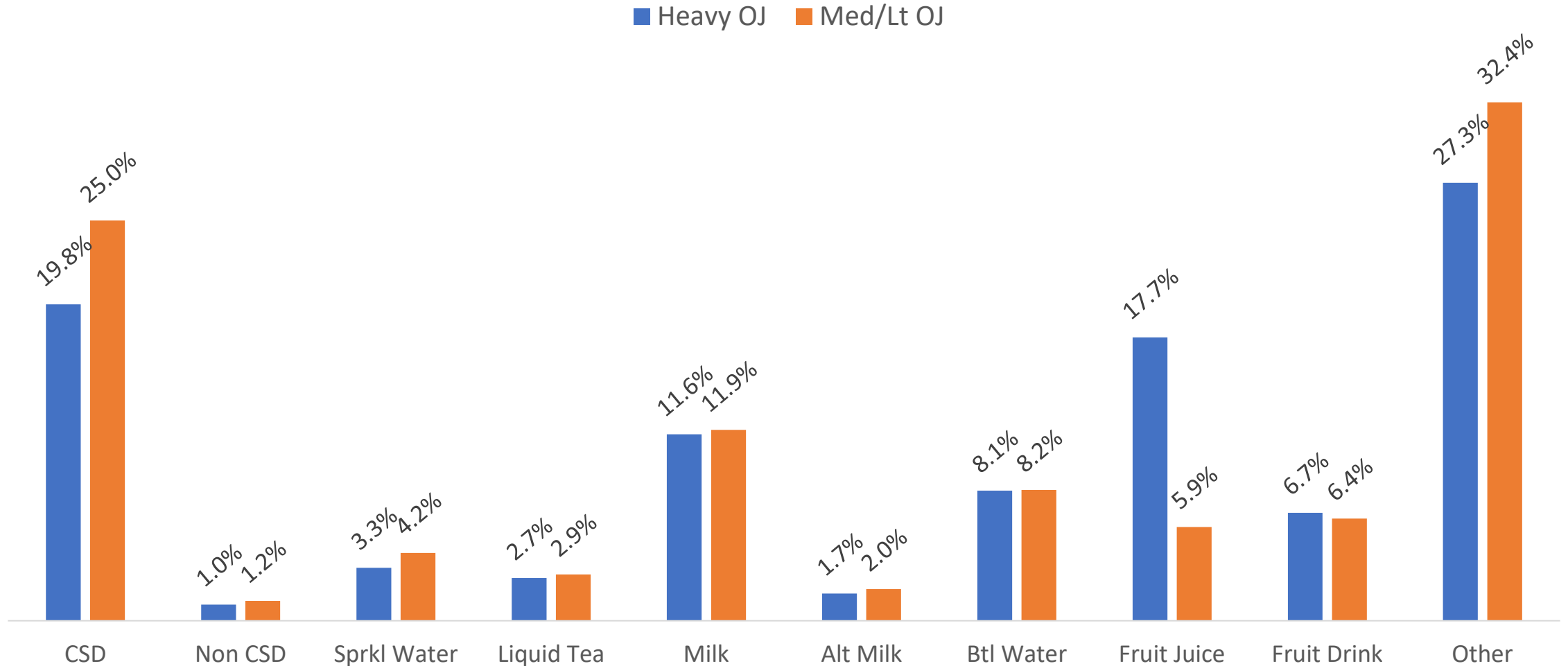
Source: Nielsen Homescan data for Y/E Dec 2025

Med/Lt OJ Buyers –OJ Purchasing Trends



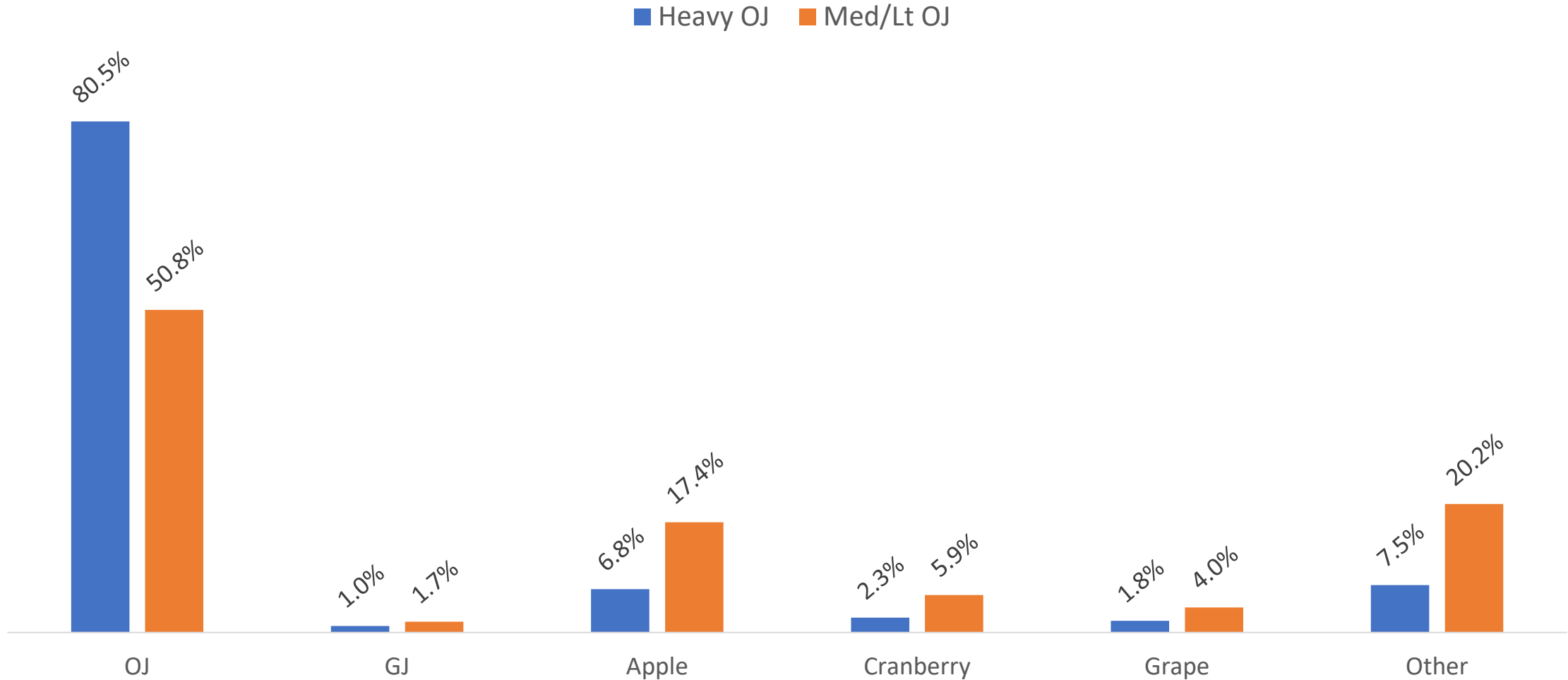
Source: Nielsen Homescan data for Y/E Dec 2025

Where did OJ Buying HHs spend beverage dollars in 2025? (Dollar share percentage)



Source: Nielsen Homescan data for Y/E Dec 2025

Where did OJ Buying HHs spend juice dollars in 2025? (Dollar share percentage)



Source: Nielsen Homescan data for Y/E Dec 2025

The image features two stylized, light gray hands. The hand on the left is positioned in the upper left corner, holding a large, solid orange circle. The hand on the right is positioned in the lower right corner, also holding a large, solid orange circle. The text is centered between these two hands.

Appendix: NIQ New Methodology Enhanced Trip Projection

Enhanced Trip Projection

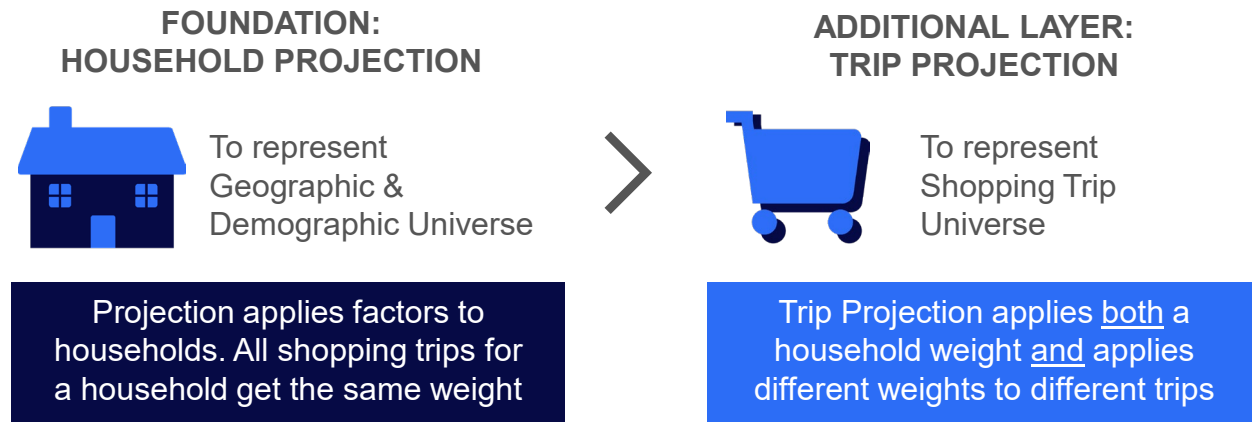
NIQ



NielsenIQ's Trip Projection

How does Trip Projection work?

Our experience tells us that when a panelist records a trip, it's usually recorded with relatively high quality. Panelists, however, are human and despite what panel they join, will at times forget, be unable, or simply choose not to record some shopping trips. Therefore, even the largest panels (even if the entire market were recruited) will be inherently biased by missing trips. Research shows that this bias is the main cause of trend deviation, and it is not addressed by the traditional household projection alone. Trip projection starts with applying standard household weights then incorporates different weights to different trips making data more accurate and consistent over time.

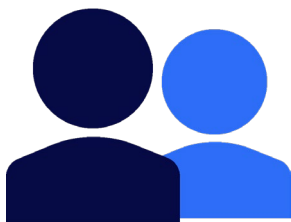


Trip Projection key benefits

- Reduces inherent panel bias by estimating for missing shopping trips
- Improves stability and alignment to sales trends
- Represents market's geo/demo composition and shopping trip universe
- Increases usable sample
- Increases coverage levels versus household projection
- Reduces variances from period to period
- Maintains integrity of consumer dynamics (penetration, buy rate, frequency)
- Continued granularity across complex report models and various buyer segments
- Provides scale, automation, speed, efficiency, & consistency across enabled platforms

Trip Projection is a More Sophisticated Process

Three key factors influence the purchase patterns of consumers



DEMO'S & GEO'S OF THE PANELISTS

Different demographics and geographics require different projections, which are based on US Census estimates



WHAT WAS PURCHASED

Different products have different purchase patterns (fast vs. slow moving for example) and require different adjustments



WHERE THE PURCHASE OCCURRED

Different store types (Mass, Grocery, etc.) have different products and consumers within the store, leading to varying purchase behavior

HOUSEHOLD PROJECTION

US Census estimates

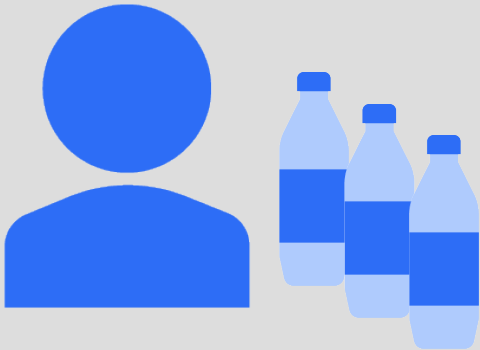


TRIP PROJECTION

Applying additional “Trip Factors” allows for better projection estimates

used to create full projection

Trip Projection: Example of Trip Factors



Gabe: makes 3 trips to purchase beverages

Millennial Male

Projection Factor: **x2700**



Total

	Sam's	Grocery	Convenience	
HOUSEHOLD PROJECTION	2,700	2,700	2,700	8,100
TRIP PROJECTION	2,700 +100 =2,800	2,700 -400 =2,300	2,700 +900 =3,600	8,700

The Household Projection Factor remains the foundation, while the additional Trip Projection factors are applied to modify the projection of each trip, based on **where the consumer is shopping and what they are purchasing**.

The point of trip projection is to establish the importance and the uniqueness of each trip based on where and what is purchased to give more robust data alignment

Thank You

