

FRESH POTATOES PATH TO PURCHASE STUDY



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BACKGROUND

Kantar Insights Consulting is a team of brand and marketing specialists who focus on growth for the retail sector. Kantar Insights Consulting gathered information from potato shoppers at food retailers, mass merchandise retailers, club stores and grocery online shoppers. The Path to Purchase study helped determine where and how consumers are interacting with marketing to drive retail sales. This guide will highlight the ways consumers are using these marketing tools at the different types of retailers and for all seven types of fresh potatoes.

Potato consumers are thinking about buying potatoes prior to shopping.



INTERACTIONS DRIVING PURCHASE

Consumers are using online resources, previous experience and in-store engagement to drive their decisions to buy potatoes. All of the following interactions are driving consumers to purchase more potatoes.



TOTAL STORE

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ALL RETAIL STORES

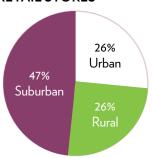


68% Female 32% Male

Millennials Boomers Gen X and Gen Z

Millennials are the number one purchasers of fresh potatoes followed by boomers, Gen X, and then Gen Z.

With Children: College Grad: 38%



SHOPPING ACTIVITIES

56%

Total percentage of consumers that engaged in pre-shop activities before shopping. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

In-Store Purchasing **Pre-Shop Activities Decision Activities** Display on Display 25% Previous Visits Recipes Price TV Package Size Flyer Ad Promotion 9% Social Media 8% Special Display Promotion 8% Smartphone 8%

Consumers are choosing the following types of potatoes based on pre-shop and in-store marketing tactics.

Russet	Red	White	Yellow	Petite	Fingerling	Purple
59%	34%	25%	24%	14%	7%	4%

PRICE OF POTATOES PURCHASED

76% Regular Price 24% On Sale	79%
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PREFERRED PACKAGING TYPE

75% Bagged 34% Loose

PREFERRED PACK SIZE

79% 5 lbs. or Less

45%	Excellent Experience*

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ALL FOOD RETAIL STORES



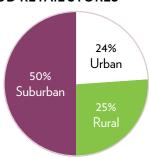
69% Female 31% Male

Millennials Boomers Gen X and Gen Z

Millennials are the number one purchasers of fresh potatoes followed by boomers, Gen X, and then Gen Z.

With Children: 31%

College Grad: 37%



SHOPPING ACTIVITIES

30%

30% of consumers decided to go to food retailers specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

In-Store Purchasing **Pre-Shop Activities Decision Activities** Display on 27% Display Previous Visits TV 10% Price Package Size Flyer Ad 10% Recipes 8% Promotion Search Engine 8% Special Display Promotion 8%

Consumers are choosing the following types of potatoes based on pre-shop and in-store marketing tactics.

Russet	Red	White	Yellow	Petite	Fingerling	Purple
57%	33%	22%	22%	14%	5%	2%

PRICE OF POTATOES PURCHASED

72% Regular Price 28% On Sale	72% Regular Price	28% On Sale	
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PREFERRED PACKAGING TYPE

72% Bagged 36% Loose

PREFERRED PACK SIZE

83% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ALL MASS RETAIL STORES



71% Female 29% Male

Millennials Boomers Gen X and Gen Z

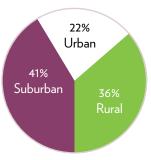
Millennials are the number one purchasers of fresh potatoes followed by boomers, Gen X, and then Gen Z.

34%

With Children:

College Grad:

31%



SHOPPING ACTIVITIES

25%

25% of consumers decided to go to mass retailers specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

Pre-Shop Activities | Display on Previous Visits | 21% | Display | 25% | | Recipes | 8% | Package Size | 22% | | TV | 8% | Price | 16% | | In-Store Signage | 7% | Special Display | 11% |

Consumers are choosing the following types of potatoes based on pre-shop and in-store marketing tactics.



PRICE OF POTATOES PURCHASED

83% Regular Price	17% On Sale	

PREFERRED PACKAGING TYPE

80% Bagged 25% Loose

PREFERRED PACK SIZE

79% 5 lbs. or Les

36%	Excellent Experience*

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

^{**}Mass merchandise retailers focus on a larger demographic selling food and non-food items such as clothing and other household items.

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ALL CLUB RETAIL STORES



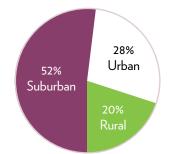
66% Female

Millennials

Boomers

Gen X and Gen Z

Millennials are the number one purchasers of fresh potatoes followed by boomers, Gen X, and then Gen Z.



With Children:

45%

College Grad:

44%

SHOPPING ACTIVITIES

22%

22% of consumers decided to go to club retailers specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

Pre-Shop	Activities		-Store Purchasing ecision Activities
Display on Previous Visits	18%	Display	35%
Social Media	11%	Price	15%
TV	9%	Package Size	14%
Recipes	8%	Nutritional Benefits	13%
Newspaper/Magazine	8%	Promotion	12%

Consumers are choosing the following types of potatoes based on pre-shop and in-store marketing tactics.

Russet	Red	White	Yellow	Petite	Fingerling	Purple
54%	33%	33%	33 %	16%	7%	1%

PRICE OF POTATOES PURCHASED

8	35% Regular Price	15% On Sale	

PREFERRED PACKAGING TYPE

88% Bagged 22% Loose

PREFERRED PACK SIZE

5 lbs. or Less

F 11 4 F : *		
54% Excellent Experience	54%	Excellent Experience*

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

^{**}Club stores require memebership for consumers to shop and purchase items and carry both food and non-food items in bulk quantities.

ONLINE**

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ALL ONLINE RETAIL STORES



51% Female 49% Male

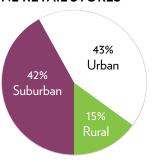
Millennials Boomers Gen X and Gen Z

Millennials are the number one purchasers of fresh potatoes followed by boomers, Gen X, and then Gen Z.

With Children: 64%

College Grad:

63%



SHOPPING ACTIVITIES

66%

66% of consumers decided to go shopping online specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

Pre-Shop Activities		Online Purchasing Decision Activities	
TV	27%	Search Bar 23%	
Display on Previous Visits	20%	Product Page 22%	
Friends/Family	20%	Price/Pack Size 22%	
Social Media	20%	Search by Type 22%	
Smartphone	19%	Shipping Cost 19%	
Digital Coupon	18%	Product Prices 18%	
Reviews	18%	Pictures/Videos 18%	
		Reviews 18%	

Consumers are choosing the following types of potatoes based on pre-shop and online marketing tactics.

Russet	Red	White	Yellow	Petite	Fingerling	Purple
57%	56%	44%	42%	25%	24%	17%

PRICE OF POTATOES PURCHASED

72% Regular Price	28% On Sale			
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PREFERRED PACKAGING TYPE

71% Bagged 49% Loose

PREFERRED PACK SIZE

62% 5 lbs. or Less

63%	Excellent Experience*

 $^{^{*}}$ Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

^{**}The online segment includes food and non-food purchases made online and received via home delivery or by store pickup.

ONLINE (STORE PICKUP)

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ONLINE SHOPPERS WHO PICK UP AT THE STORE

The online potato shopper is divided into two major segments. The online shopper choosing to pick up their groceries at the store fits into the following.





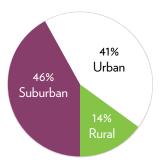
Millennials are the number one purchasers of fresh potatoes, followed by Gen X, Gen Z and then boomers.

With Children:

66%

College Grad: 65

65%



SHOPPING ACTIVITIES

63%

63% of consumers decide to go shopping online specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.

Pr	e-Shop Activities		nline Purchasing ecision Activities
Newspaper/ Magazine Friends/Family	19% 17%	Search Bar Product Page	22%
Promotion Display on	15%	Price/Pack Size	19%
Previous Visits	15%	Order History Recommended Products	17%
		Promotion	17%

The following describes consumers' preferences during their final buying moments

PRICE OF POTATOES PURCHASED

78% Regular Price 22% On Sale

PREFERRED PACKAGING TYPE

76% Bagged 44% Loose

PREFERRED PACK SIZE

65% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

61% Excellent Experience*

*Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

ONLINE (HOME DELIVERY)

DEMOGRAPHICS OF THE FRESH POTATO CONSUMER FOR ONLINE SHOPPERS WHO HAVE THEIR FOOD DELIVERED AT HOME

The online potato shopper is divided into two major segments. The online shopper choosing to get their groceries delivered at home fits into the following.





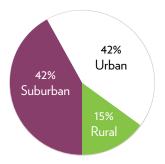
Millennials are the number one purchasers of fresh potatoes, followed by Gen X, Gen Z and then boomers.

With Children:

69%

College Grad:

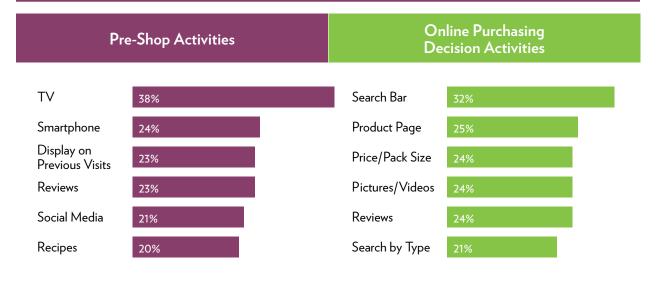
63%



SHOPPING ACTIVITIES

75%

75% of consumers decide to go shopping online specifically to buy fresh potatoes. The activities below are the most impactful ways to drive fresh potato volume and dollar sales with retail consumers.



The following describes consumers' preferences during their final buying moments

PRICE OF POTATOES PURCHASED

64% Regular Price 36% On Sale

PREFERRED PACKAGING TYPE

68% Bagged 51% Loose

PREFERRED PACK SIZE

57% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.

TYPES OF POTATO CONSUMERS

OVERVIEW

There are three types of fresh potato consumers. All are impacted in different ways. Some of these consumers are more engaged than others. They all contribute to sales in-store and provide opportunities for engagement on all types of potatoes.

ENGAGED ONLINE AND OFFLINE

This consumer is highly engaged both pre-shopping trip and in-store.

56% Female

44% Male

Average Income:

Millennials

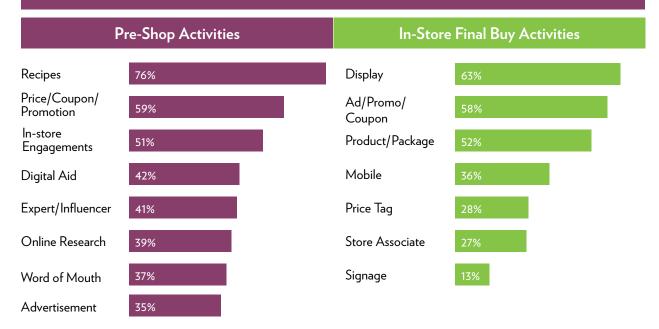
Gen X

Boomers

Millennials are the number one purchasers of fresh potatoes for the engaged online and offline consumer, followed by Gen X, and then boomers.

SHOPPING ACTIVITIES

\$75,000



The engaged online and offline shopper is dividing their time between all four types of retailers:

 48%
 13%
 4%
 34%

 FOOD
 MASS
 CLUB
 ONLINE

Preferred Pack Type

- Individually wrappedMulti wrapped
- Flavored Potatoes in a Tray

Preferred Pack Size

- 8 lbs.
- 1–4 lbs.

Average Spend on Potatoes (per visit)

Gen Z

• \$14.90

TYPES OF POTATO CONSUMERS

RESPONSIVE IN-STORE

20%

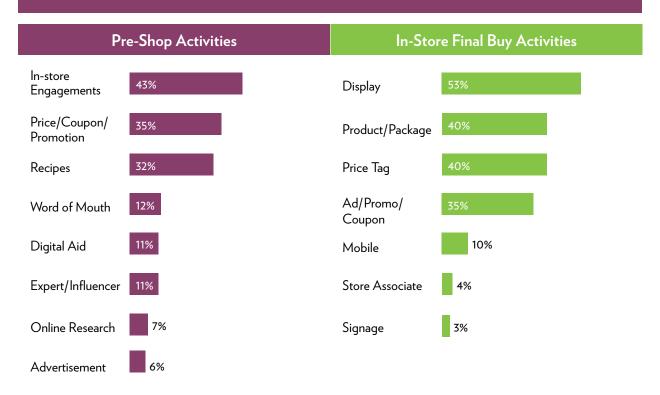
This consumer is converted in-store. They do not engage with many pre-shopping experience activities.





Millennials are the number one purchasers of fresh potatoes for the responsive in-store consumer, followed by boomers, and then $Gen\ X$.

SHOPPING ACTIVITIES



72 %	20%	5 %	3 %
FOOD	MASS	CLUB	ONLINE

Preferred Pack Type	Preferred Pack Size	Average Spend on Potatoes (per visit)
• Loose	• 1-4 lbs.	• \$8.60

TYPES OF POTATO CONSUMERS

AUTO PILOT

63%

This consumer is the grab-and-go consumer. They engage very minimally thoughout the decision-making process.





Boomers are the number one purchasers of fresh potatoes for the auto pilot consumer, followed by millennials, and then $\operatorname{\mathsf{Gen}} X$.

SHOPPING ACTIVITIES



The auto pilot shopper is dividing their time between all four types of retailers:

 62%
 25%
 7%
 7%

 FOOD
 MASS
 CLUB
 ONLINE

Preferred Pack Type	Preferred Pack Size	Average Spend on Potatoes (per visit)
• Bagged	• 5 lbs. • < 1 lb.	• \$7.50

There are seven different types of potatoes. Consumers have different experiences depending on what type of potato they buy. Below are the shopper journeys by potato type.



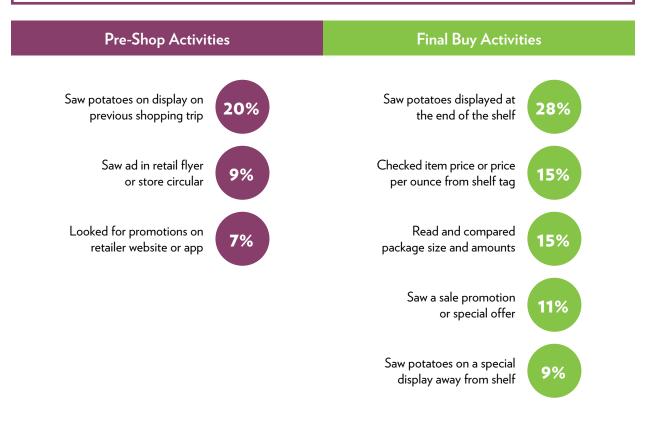
RUSSET POTATO BUYERS





Boomers are the number one purchasers of russet potatoes, followed by millennials.

of consumers know what type of potato they are buying before going to the store



Purchase Decision

PRICE OF POTATOES PURCHASED PREFERRED PACK SIZE 26% On Sale 77% 5 lbs. or Less

PREFERRED PACKAGING TYPE

74% Regular Price

76% Bagged 24% Loose

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



RED POTATO BUYERS





Boomers are the number one purchasers of red potatoes, followed by millennials.

66%

of consumers know what type of potato they are buying before going to the store

Final Buy Activities Pre-Shop Activities Saw potatoes displayed at Saw potatoes on display on 29% previous shopping trip the end of the shelf Saw ad in retail flyer Checked item price or price 20% or store circular per ounce from shelf tag Used shopping list app on Read and compared 10% 15% smart phone package size and amounts Watched cooking shows Saw potatoes on a special 15% or saw recipes on TVdisplay away from shelf Saw a sale promotion Saw potato recipes 11% on social media or special offer Read or watched recipes on recipe website or app

Purchase Decision

PRICE OF POTATOES PURCHASED

77% Regular Price

23% On Sale

PREFERRED PACKAGING TYPE

69% Bagged 34% Loose

PREFERRED PACK SIZE

86% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



YELLOW POTATO BUYERS



67% Fema	33% Male	2	
Millenials	Gen X	Boomers	Gen Z

Millennials are the number one purchasers of yellow potatoes, followed by Gen X.

64%

of consumers know what type of potato they are buying before going to the store

Final Buy Activities Pre-Shop Activities Saw potatoes displayed at Saw potatoes on display on 28% 31% previous shopping trip the end of the shelf Watched cooking shows Checked item price or price 16% 16% or saw recipes on TV per ounce from shelf tag Saw potato recipes Read and compared 13% 16% on social media package size and amounts Used shopping list app on Saw potatoes on a special 12% 14% display away from shelf smart phone Recommendations from Saw a sale promotion 11% 10% friends and family or special offer Read or watched recipes 10% on recipe website or app Saw signage in store about 10% potato products Used recipe app to create 10% shopping list

Purchase Decision

PRICE OF POTATOES PURCHASED

78% Regular Price 22% On Sale

PREFERRED PACKAGING TYPE

79% Bagged 38% Loose

PREFERRED PACK SIZE

82% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

45% Excellent Experience*

*Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



WHITE POTATO BUYERS



61% Fe	39% Male		
Boomers	Millennials	Gen X	Gen Z

Boomers are the number one purchasers of white potatoes, followed by millennials.

62%

of consumers know what type of potato they are buying before going to the store

Pre-Shop Activities

Final Buy Activities



Purchase Decision

PRICE OF POTATOES PURCHASED

74% Regular Price 26% On Sale

PREFERRED PACKAGING TYPE

84% Bagged 28% Loose

PREFERRED PACK SIZE

75% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



PURPLE POTATO BUYERS



58% Female	42% Male		
Millennials	Gen X	Boomers	Gen Z

Millennials are the number one purchasers of purple potatoes, followed by Gen X.

56%

of consumers know what type of potato they are buying before going to the store

Pre-Shop Activities

Final Buy Activities

Saw potatoes on display on previous shopping trip	33%	Saw potatoes displayed at the end of the shelf	35%
Watched cooking shows or saw recipes on TV	31%	Checked item price or price per ounce from shelf tag	31%
Saw a post about potatoes on social media	23%	Read and compared package size and amounts	23%
Used recipe app to create shopping list	23%	Saw potatoes on a special display away from shelf	23%
Received or saw a paper coupon	19%	Saw a sale promotion or special offer	23%
Searched for a digital coupon	19%		
Asked smart home assistant about product and recipes	19%		

Purchase Decision

PRICE OF POTATOES PURCHASED

73% Regular Price 27% On Sale

PREFERRED PACKAGING TYPE

67% Bagged 67% Loose

PREFERRED PACK SIZE

62% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

54% Excellent Experience*

*Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



FINGERLING POTATO BUYERS



52% Female	48% Male		
Millennials	Gen X	Boomers	Gen Z

Millennials are the number one purchasers of fingerling potatoes, followed by Gen X.

60%

of consumers know what type of potato they are buying before going to the store

Pre-Shop Activities Final Buy Activities Saw potatoes on display on Saw potatoes displayed at the end of the shelf previous shopping trip Watched cooking shows Checked item price or price 22% or saw recipes on TV per ounce from shelf tag Searched for potatoes Checked product information 20% 19% using a search engine and reviews on smart phone Saw a post about potatoes Saw potatoes on a special 19% on social media display away from shelf Saw nutrition, meal plans, or Read nutrition and health 19% benefits on package lifestyle information on blog

Purchase Decision

PRICE OF POTATOES PURCHASED

79% Regular Price 21% On Sale

PREFERRED PACKAGING TYPE

70% Bagged 62% Loose

PREFERRED PACK SIZE

67% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



PETITE POTATO BUYERS



74% Female		26% Male	
Millennials	Boomers	Gen X	Gen Z

Millennials are the number one purchasers of petite potatoes, followed by boomers.

64%

of consumers know what type of potato they are buying before going to the store

Pre-Shop Activities

Final Buy Activities

Saw potatoes on display on previous shopping trip	21%	Saw potatoes displayed at the end of the shelf	30%
Searched for potatoes using a search engine	10%	Checked item price or price per ounce from shelf tag	21%
Saw ad in retail flyer or store circular	10%	Read and compared package size and amounts	21%
Watched cooking shows or saw recipes on TV	9%	Saw a sale promotion or special offer	17%
Read or watched recipes on recipe website or app	9%	Saw potatoes on a special display away from shelf	14%
Looked for promotions on retailer website or app	9%		
Saw potato recipes on social media	9%		

Purchase Decision

PRICE OF POTATOES PURCHASED

79% Regular Price

21% On Sale

PREFERRED PACKAGING TYPE

73% Bagged 36% Loose

PREFERRED PACK SIZE

82% 5 lbs. or Less

MAIN REASON FOR REPURCHASE

46%

^{*}Impact of in-store and at-home experience on consumer decision of which type of potatoes to buy.



For more information, visit PotatoRetailer.com

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Source: Kantar Insights Consulting