Retail Pulse Essentials Country 2025-2026

Annual report on Shopper Behavior and Retail Performance within the Grocery Retail Sector



EXAMPLE REPORT · ILLUSTRATIVE DATA ONLY

January, 2025

NielsenIQ

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Your guide to the shopper

Know your shoppers, grow your brand

Manufacturers



Shoppers



Retailers



Globally, sluggish economic growth has led to shoppers feeling the cumulative inflationary impact on their wallets and shoppers are **adopting new shopping strategies**. In parallel the retail landscape has become **highly competitive** with new formats and players emerging.

Retailers and **manufacturers** are similarly challenged to engage and contend for the basket of the increasingly fickle shopper in the midst of the current dynamic environment. Identifying and navigating through these shifts in shopper attitudes and behavior has become **fundamental for your brand's success**.

Please note: this is an example report. All figures, retailer results and charts contain example data for illustrative purposes only and do not represent actual NIQ results.

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Hypermarkets attract more shoppers, while CVS face engagement challenges.

Channel relationship tiers (in %)

	Supermarket		Hypermarkets	
	2023	2024	2023	2024
Spend most in	2	2	1	1
Visited within P7D	34	33	28	38 ▲
Visited within P4W	51	48	43	48 ▲
Visit occasionally	60	60	51	58 ▲
Frequency of visiting *(times a month)*	**3.3**	**3.5**	**5.0**	**5.2**

	CVS		Convenience Stores IN petrol	
	2023	2024	2023	2024
Spend most in	1	0 ▼	0	0
Visited within P7D	35	30 ▼	21	23
Visited within P4W	48	40 ▼	35	35
Visit occasionally	57	51 ▼	45	46
Frequency of visiting *(times a month)*	**4.9**	**4.7**	**3.3**	**3.8**

Base: All shoppers 2023 (n=1003), 2024 (n=1000)

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Profile of shopper (gender, age, marital status & household members) – by grocery chains

In %	Total	Retailer 1	Retailer 1	Retailer 1	Retailer 1	Retailer 1
Gender						
Men	**48%**	49	53	47	50	40
Women	**52%**	51	47	53	50	60
Age						
18-24 y.o.	**12%**	11	20	13	9	16
25-34 y.o.	**24%**	22	25	24	25	23
35-49 y.o.	**35%**	32	27	34	39	33
50-65 y.o.	**28%**	35	29	30	27	28
Marital Status						
Single	**35%**	37	47	41	31	30
Married	**52%**	54	43	46	57	63
Divorced/ Separated	**9%**	8	4	10	5	5
Widowed/ Widower	**3%**	1	4	1	2	0
Refused	**1%**	1	1	1	4	2
Household Members						
1	**26%**	29	31	30	23	26
2	**28%**	30	33	38	22	35
3	**18%**	16	17	15	22	16
4	**21%**	17	13	12	25	12
5 or more	**6%**	7	5	5	7	11

Base: All HM/SM shoppers who visit store most often. 2024
Ref: Q4 Please record your gender ; Q5 Which age group from the list below do you belong to?
Q69 Marital status. Q75 How many people are there in your household including yourself? **base <50 ineligible for sig testing

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Retailer 1 steady loyalty contrasts Retailer 2 struggle with low awareness and preference. Retailer 2 challenges highlight potential areas for engagement improvement.



Base: All HM/SM shoppers, 2023 (n=1203), 2024 (n=1195)
Q11a (TOM), Q11b (spontaneous.), Q11c (prompted), Q11d (last 12 months), q12a (considering), Q13b (last 4 weeks), Q13a (most often), Q13c (preferred), q13d (recommended), Q12c (dislike), Q12b (too hard to get to)

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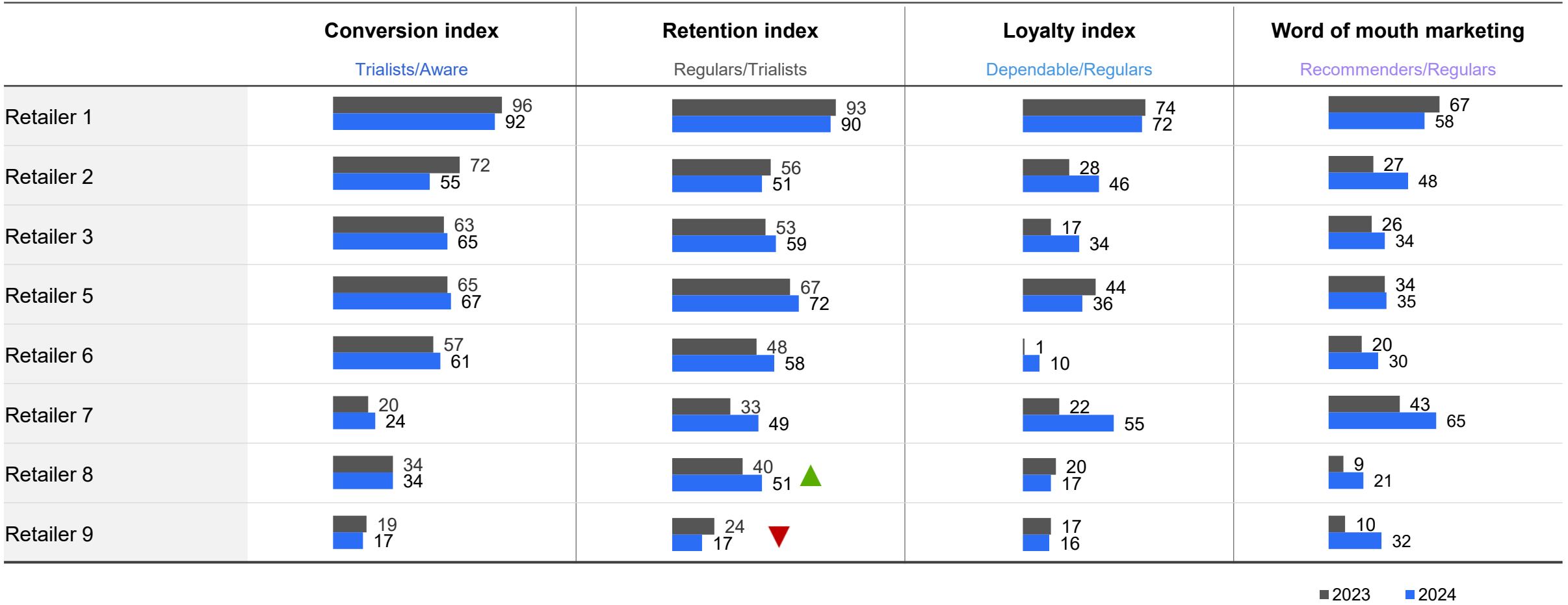
Despite softer conversion and retention rates. Retailer 1 dominates shopper engagement metrics. Retention strengthens for Retailer 8.

Conversion ratio (in %)



Base: All HM/SM shoppers, 2023 (n=1097), 2024 (n=1389)
Funnel, calculation based on ratios

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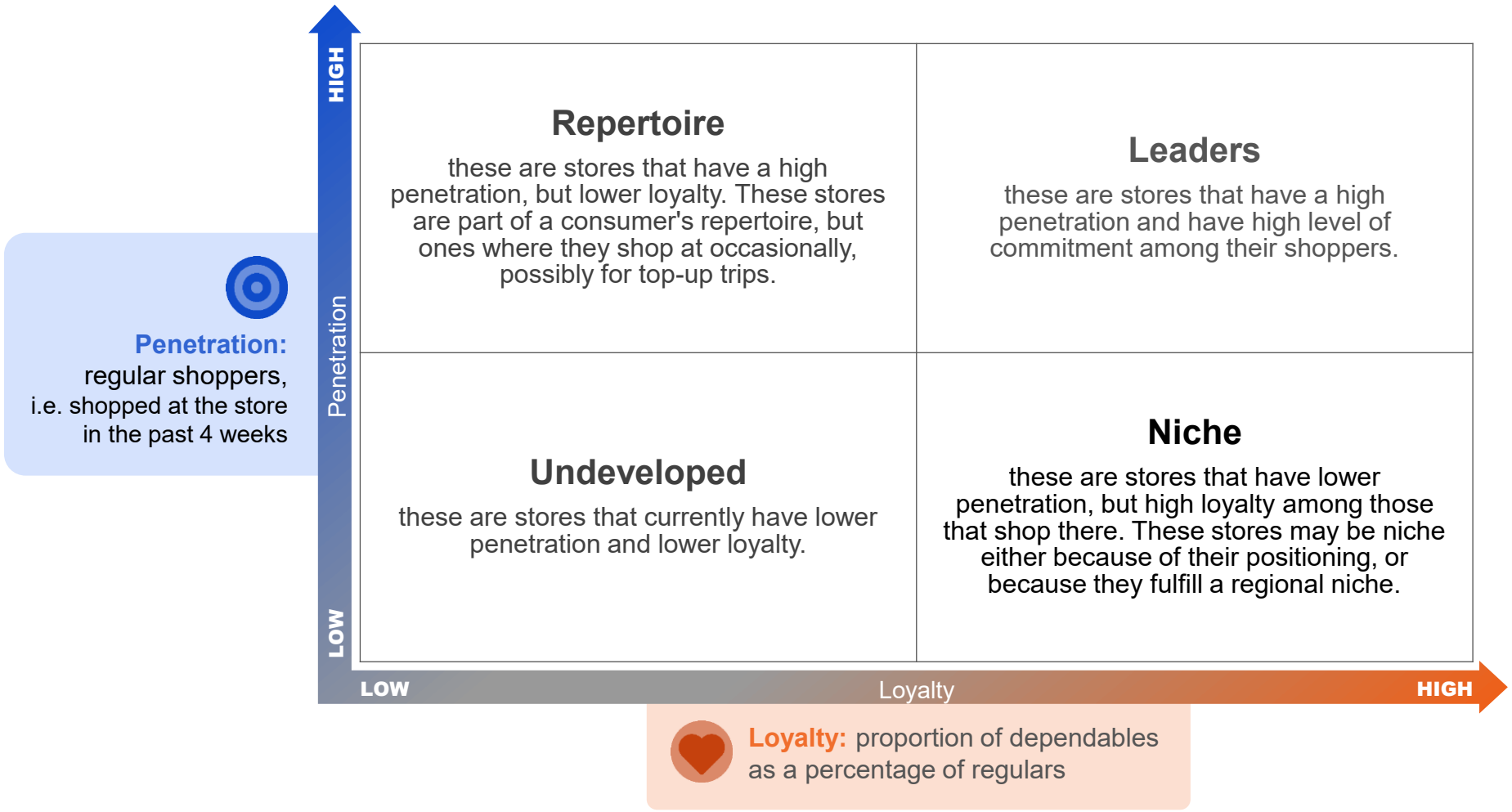
Positioning



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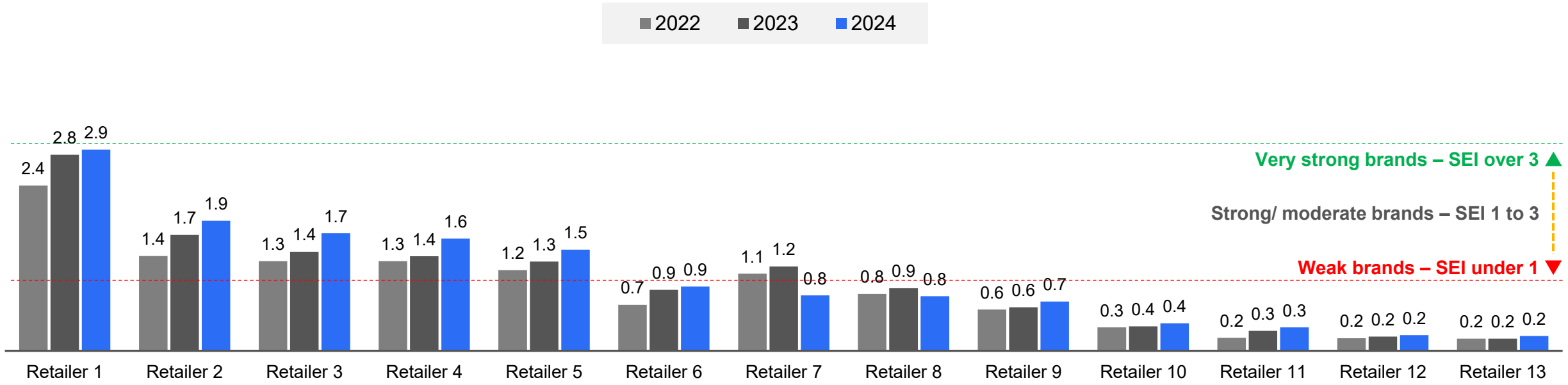
Retailer 1 achieves top store equity index with steady growth over time. Underperforming brands highlight opportunities for strategic improvement.

Store equity index (SEI)

Store equity index is calculated from **preferred, recommendation, willingness to pay price premium and willingness to travel**



Base: All HM/SM shoppers 2022 (n=1074), 2023 (n=1201), 2024 (n=1195)

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Diverse brand preferences across age groups highlight SEI variations. Retailer 1 appeals strongly to younger shoppers, having the highest SEI among 25-39 age group.

Store equity index (2024) – by Age

	Total	Age group				
		18-24 yo	25-34 yo	35-39 yo	40-49 yo	50-65 yo
Retailer 1	3.1	2.8	3.5	3.5	3.0	2.9
Retailer 2	1.9	1.9	2.1	1.6	1.6	2.1
Retailer 3	1.9	1.2	1.7	1.9	2.1	2.0
Retailer 4	1.6	2.1	1.8	1.6	2.0	1.4
Retailer 5	1.1	1.5	1.1	1.2	1.1	1.1
Retailer 6	1.1	1.4	1.2	1.6	1.0	0.9
Retailer 7	0.9	0.7	0.8	1.0	0.9	0.9
Retailer 8	0.6	0.8	0.6	0.7	0.3	0.7
Retailer 9	0.3	0.5	0.4	0.4	0.2	0.2
Retailer 10	0.3	0.6	0.2	0.3	0.2	0.2
Retailer 11	0.2	0.1	0.3	0.1	0.4	0.2
Retailer 12	0.2	0.3	0.1	0.1	0.1	0.1

Base: All HM/SM shoppers, 2024 (n=782)

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Understanding shopper priorities: product quality, service, and convenience lead store choice. Market fragmentation reveals opportunities for differentiation in 2024.

Store Choice Drivers

Explaining store equity	2024	
Awareness	13%	Awareness and consideration information enable us to explain how differentiated is the market. The lower the consideration and awareness combined %, the more fragmented is the market
Consideration	14%	
Product Quality & Variety	17%	The store offers high-quality products and consistently stocks desired items. It provides a wide selection of fresh produce, fish, meat, prepared meals, personal and home care products, as well as unique items.
Pricing & Promotions	13%	The store is perceived as offering low prices, attractive sales and promotions, products which are good value for money, as well as private label products.
Customer Service & Engagement	16%	Shoppers expect excellent customer service and a clean, organized store with well-presented displays, clear signage, themed zones and efficient checkouts, no contact payment options, creating a pleasant shopping environment.
Convenience & Accessibility	16%	Convenient location, reward program, easy returns, self-checkout option, no contact payment options, store open for long hours and ample parking.
Value-Added Services	11%	On-premise dining, paid membership program, multi-platform ordering and additional facilities.

Base: All HM/SM shoppers 2024 (n=998)
Ref: Q11a/Q11b/Q11c,Q12a, Q16, Q18

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Store Choice Drivers

Product Quality & Variety

17%

- ✓ High quality products
- ✓ Offers ability to buy in bulk
- ✓ Carries the brands I like
- ✓ Always have what I want in stock
- ✓ Wide range of fruit & vegetables
- ✓ Wide range of fresh fish & meat
- ✓ High quality prepared meals/foods
- ✓ Good "better for you" selection (healthy, organic, natural, gluten free, vegan, plant based etc.)
- ✓ Wide range of Personal/ Home care products
- ✓ Carries unique items
- ✓ Has a wider variety of products
- ✓ High quality fresh food
- ✓ Food & products from my home country available
- ✓ Everything I need is in one shop

Pricing & Promotions

13%

- ✓ Food and groceries are good value for money
- ✓ Low prices for most items
- ✓ Good sales, deals & promotions
- ✓ Products are good value for money
- ✓ Offers their own brand of products

Customer Service & Engagement

16%

- ✓ Excellent customer service
- ✓ Easy to find products
- ✓ Helpful and knowledgeable associates
- ✓ Useful & sufficient in-store signage
- ✓ Clean and hygienic store
- ✓ Store is uncluttered
- ✓ Efficient checkout counters
- ✓ Can get in and out quickly
- ✓ Socially/environmentally responsible retailer
- ✓ Well-presented product displays
- ✓ Rich and interesting theme-based zones
- ✓ Pleasant store environment
- ✓ Enjoyable shopping experience

Convenience & Accessibility

16%

- ✓ Convenient to get to
- ✓ Has loyalty programs that reward regular purchase of products
- ✓ Ease of returns
- ✓ Self-checkout option
- ✓ Long opening hours
- ✓ Convenient and ample parking
- ✓ Contactless payment options

Value-Added Services

11%

- ✓ Places to dine on premise
- ✓ Good paid membership program
- ✓ Online platform to provide store/product information before going to shop
- ✓ Offers ordering on multiple platforms
- ✓ Has paper leaflets/ circulars/flyers
- ✓ Provides additional facilities (clean toilet, free Wi-Fi, ATM etc.)

Base: All HM/SM shoppers, 2024 (n=998)
Ref: Q11a/Q11b/Q11c,Q12a, Q16, Q18

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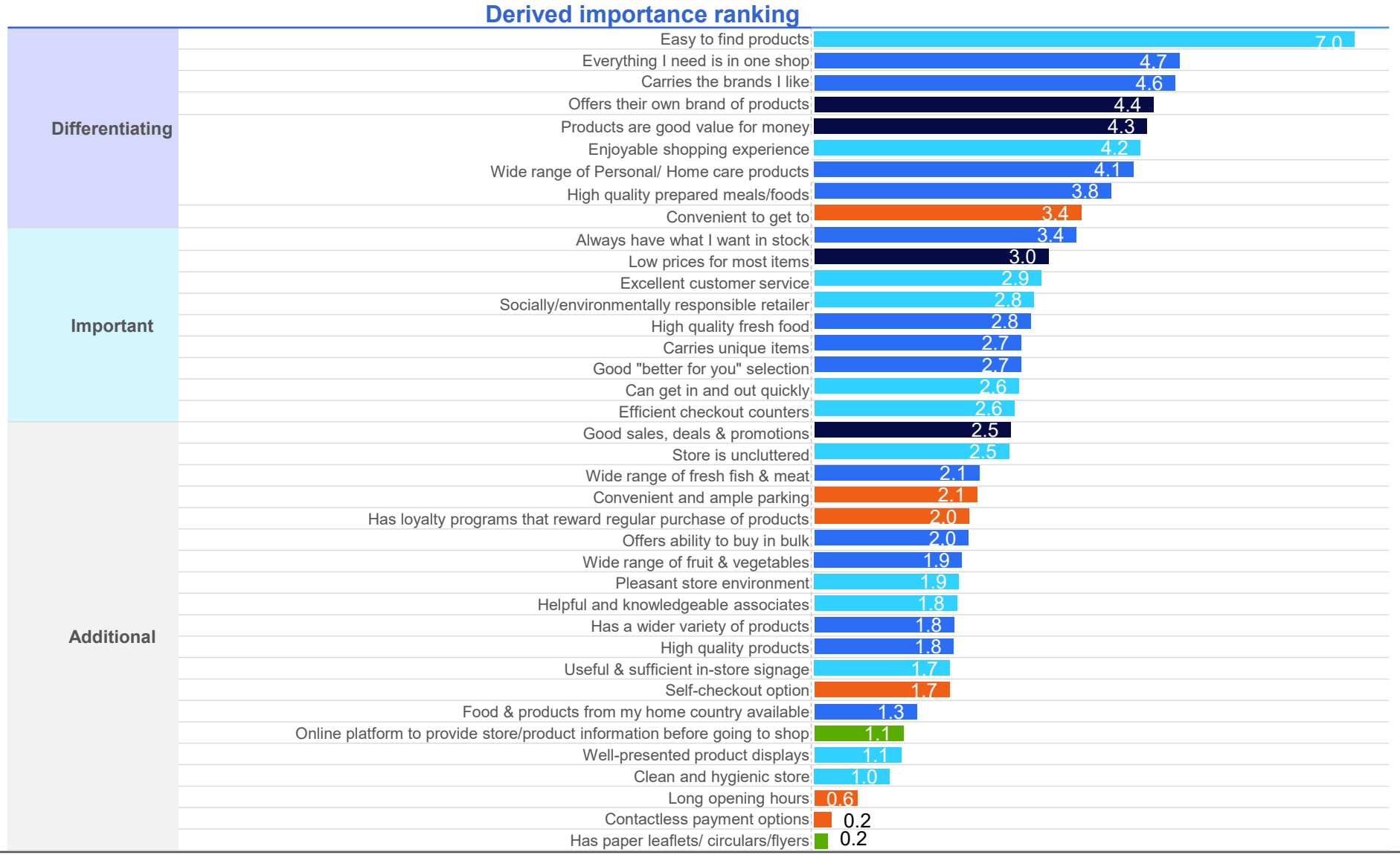
Convenience and product variety emerge as key differentiators in store selection. Comprehensive availability and quality define shopper preferences.



Base: All HM/SM shoppers, 2024 (n=998)
Ref: Q11a/Q11b/Q11c,Q12a, Q16, Q18

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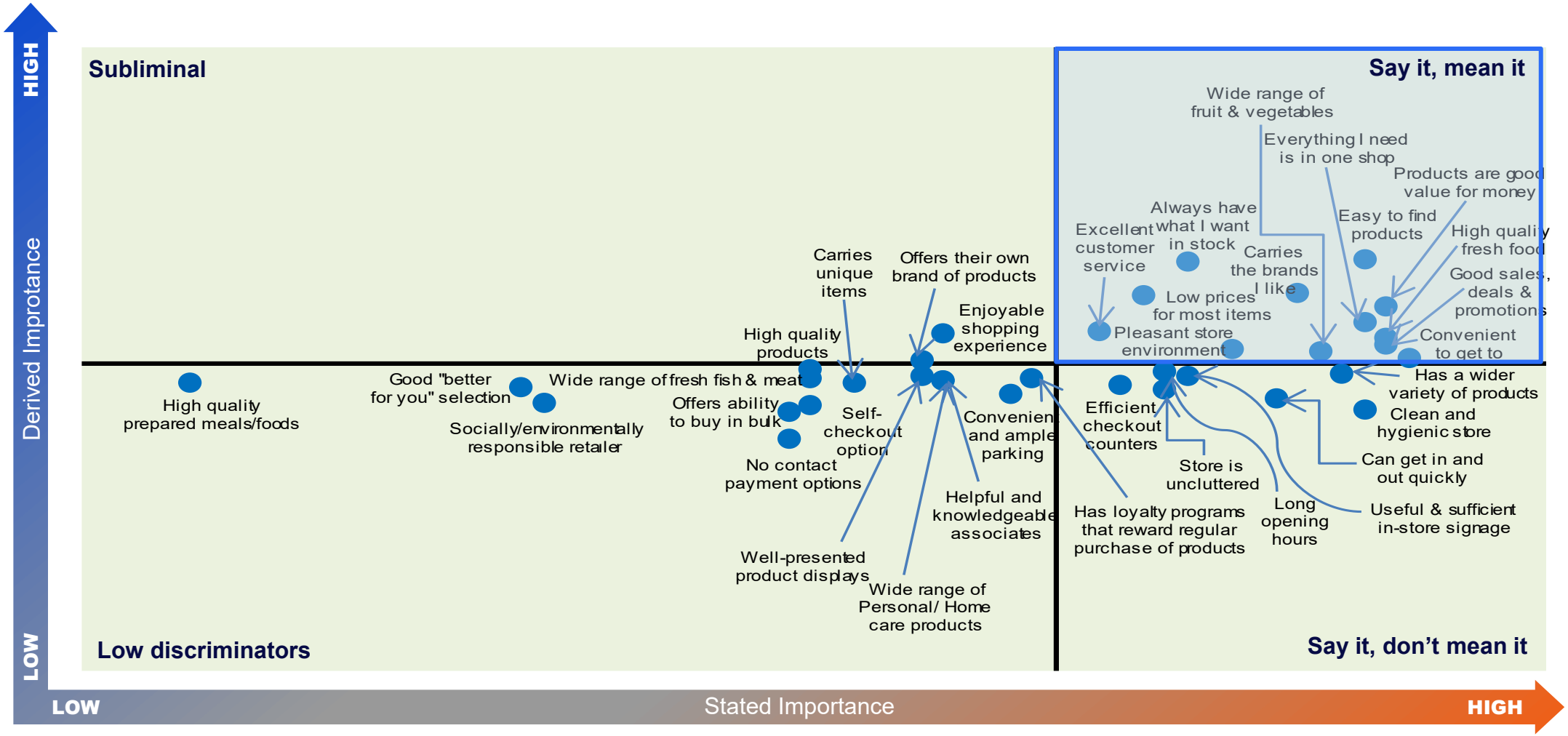
Importance of attributes

Shoppers favor wide (value for money) product ranges and convenience in retail choices. Less emphasis on high quality and unique offerings by shoppers.



Base: all HM/SM shoppers 2024 (n=1090)
Ref: Q16 (Stated importance)/ Q11a/Q11b/Q11c,Q12a, Q16, Q18 (Derived importance)

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Retailer1 leads in low prices and value, while Retailer 2 excels in convenience. Retailer 3 stands out with excellent customer service and product variety.

Relative retailer performance on attributes



Base: All HM/SM shoppers, 2024 who rate
Ref: Q18 Thinking about the same statements, please indicate which stores you associate with each of the statements?

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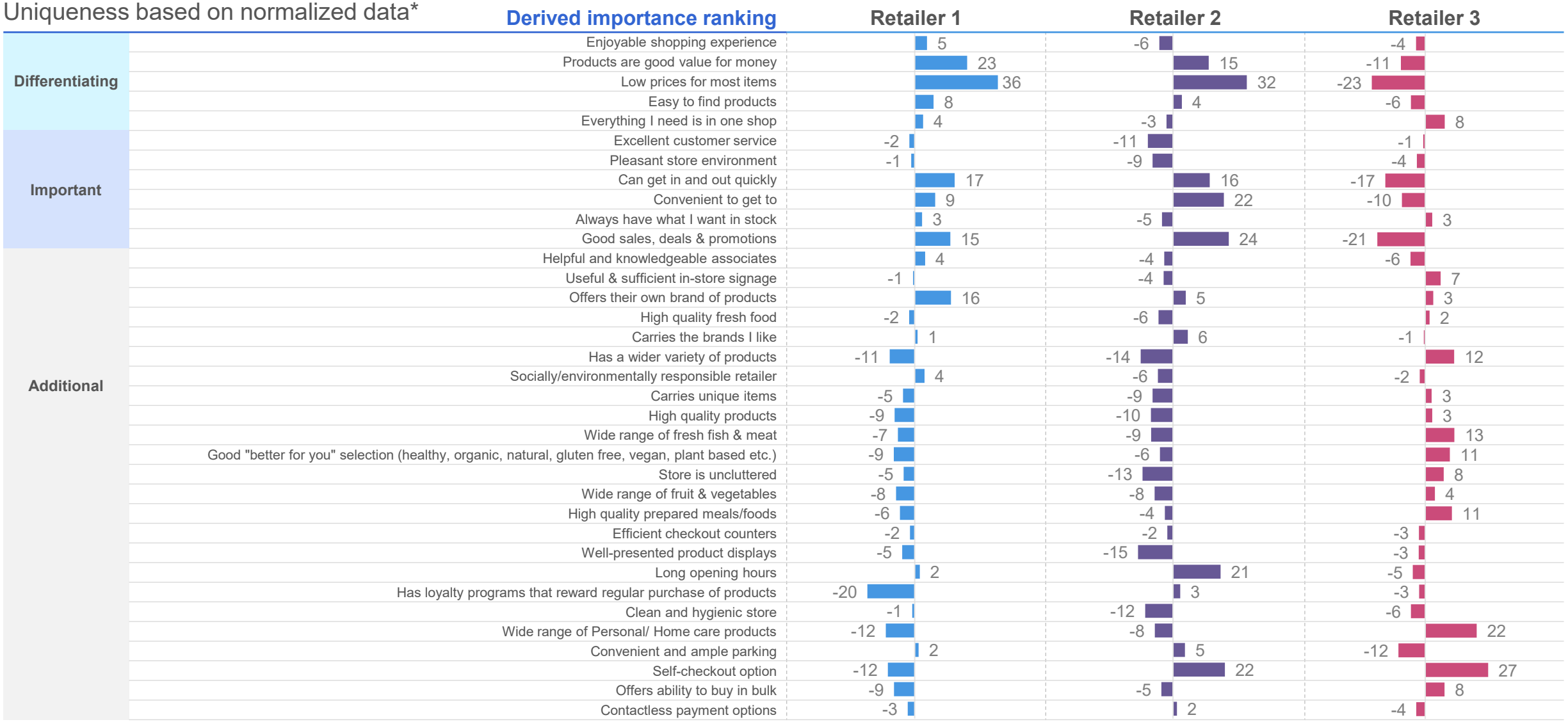
Each retailer's unique attributes highlighted: Retailer 1 value, Retailer 2 convenience, and Retailer 3 service.

Uniqueness based on normalized data*



*DATA NORMALIZATION – statistical method which allow to derive differences between market players and allow to identify key strengths and weaknesses among competitors. It doesn't show performance – only differentiation / associations. Bigger difference – stronger uniqueness from others.

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