

Grocery Industry:

Eat or Be Eaten

EAST COAST GLOBAL CONSULTING

Agenda

- Challenge Delia
- Key Issues & Objectives
- What's happening? Allison
- The Hunger Games Delia
- What are they doing about it? Jennifer
- So what else? Chelsey
- Eat or be eaten

Challenge

How can a traditional grocery store compete in a disruptive landscape?

Key Issues

- Customer preference disparity
- Increasing use of technology
- Highly disruptive industry

Key Objectives

- Maintain/recapture growth
- Serve customers evolving needs
- Avoid alienating traditional customer base

What's happening?

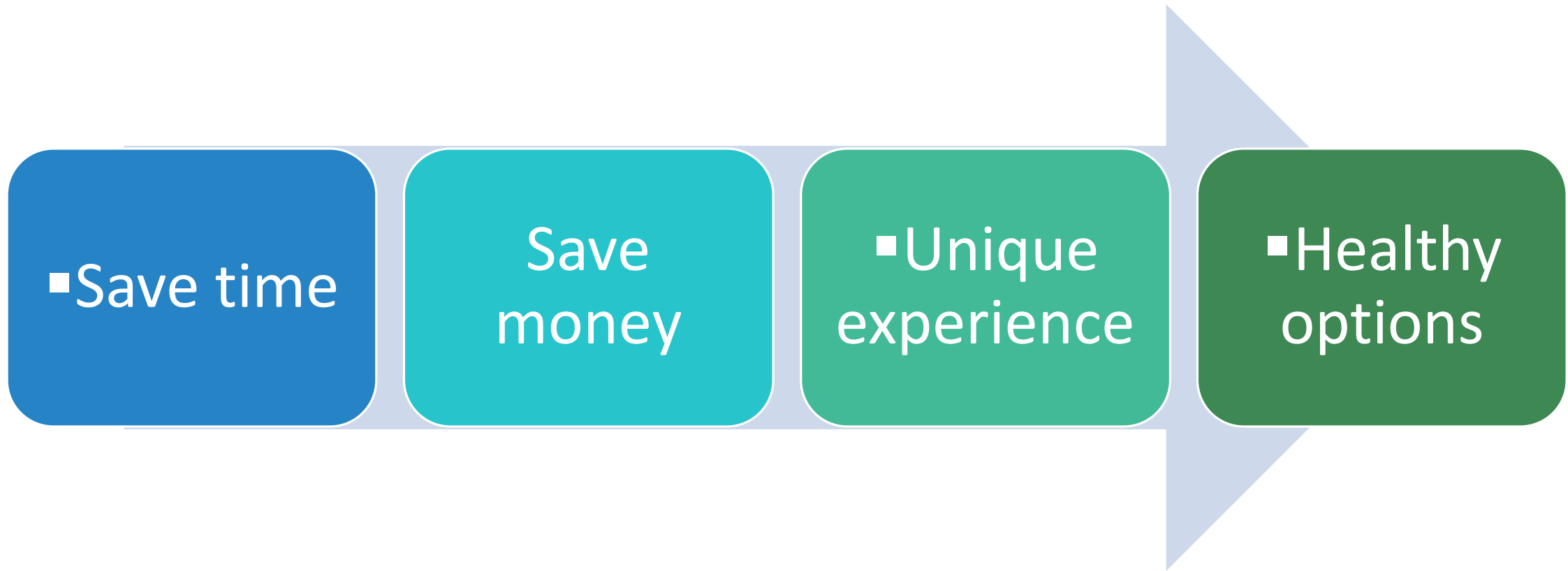
ALLISON PENTON

Root Cause Analysis

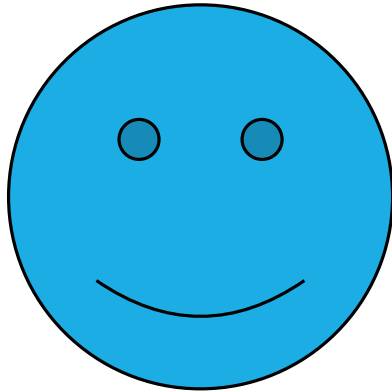
What's Changed?

Customer Preferences

What does the customer want?



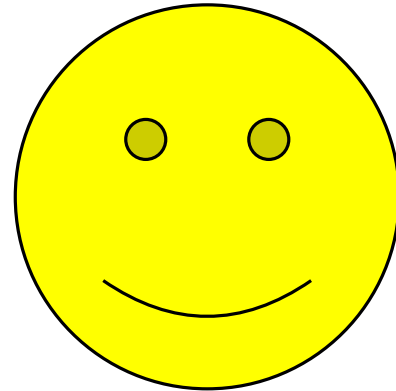
Customer Profiles



ELAINE, 35

Mother of 3

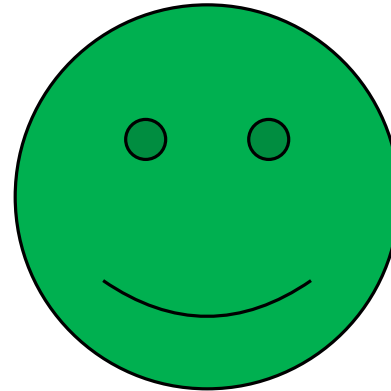
HelloFresh



TONY, 54

Sr. Accountant

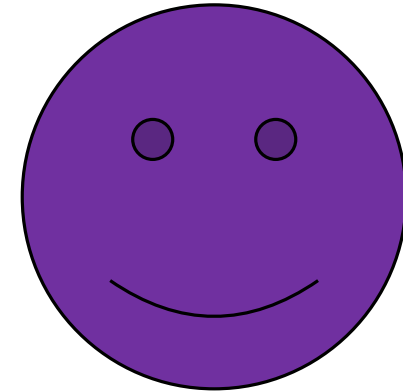
Skip the Dishes



JAY, 23

Software Developer

Trader Joe's



HELEN, 71

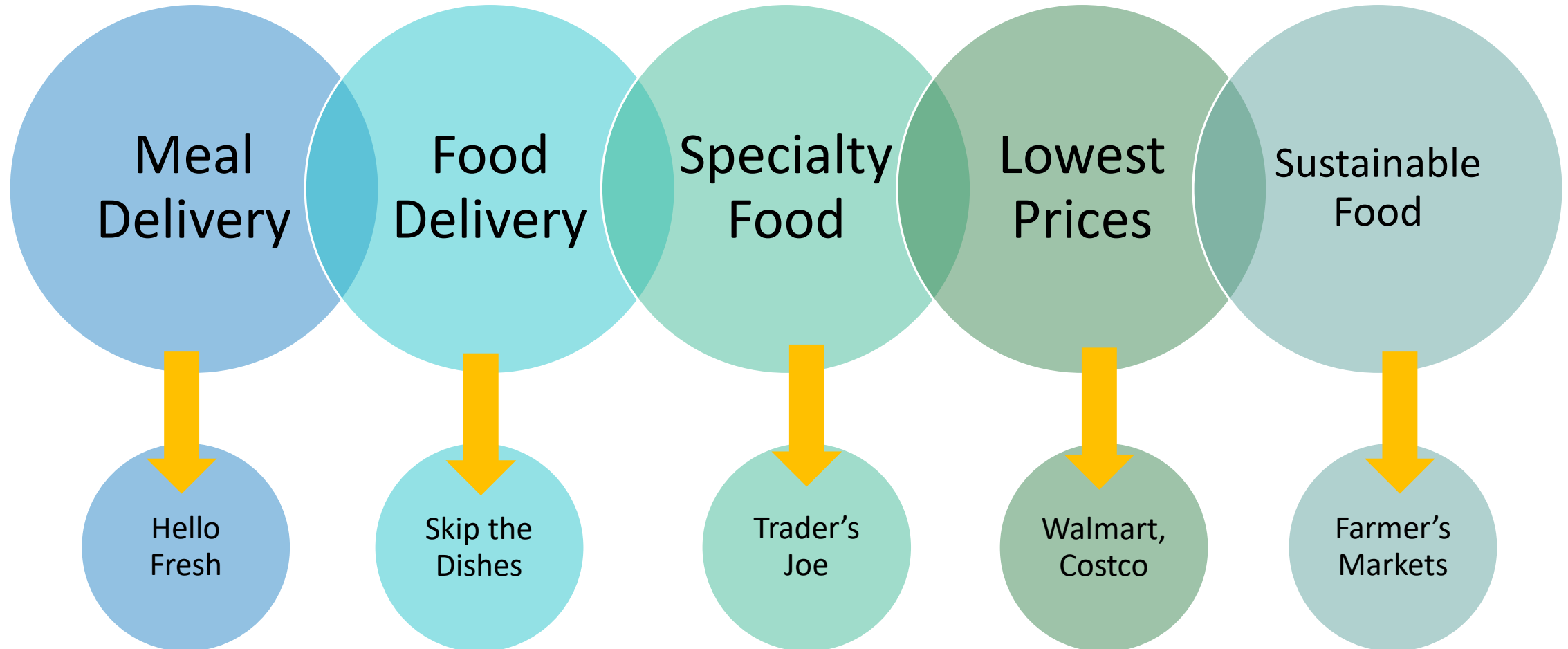
Retiree

Loblaws

The Hunger Games

DELIA WARREN

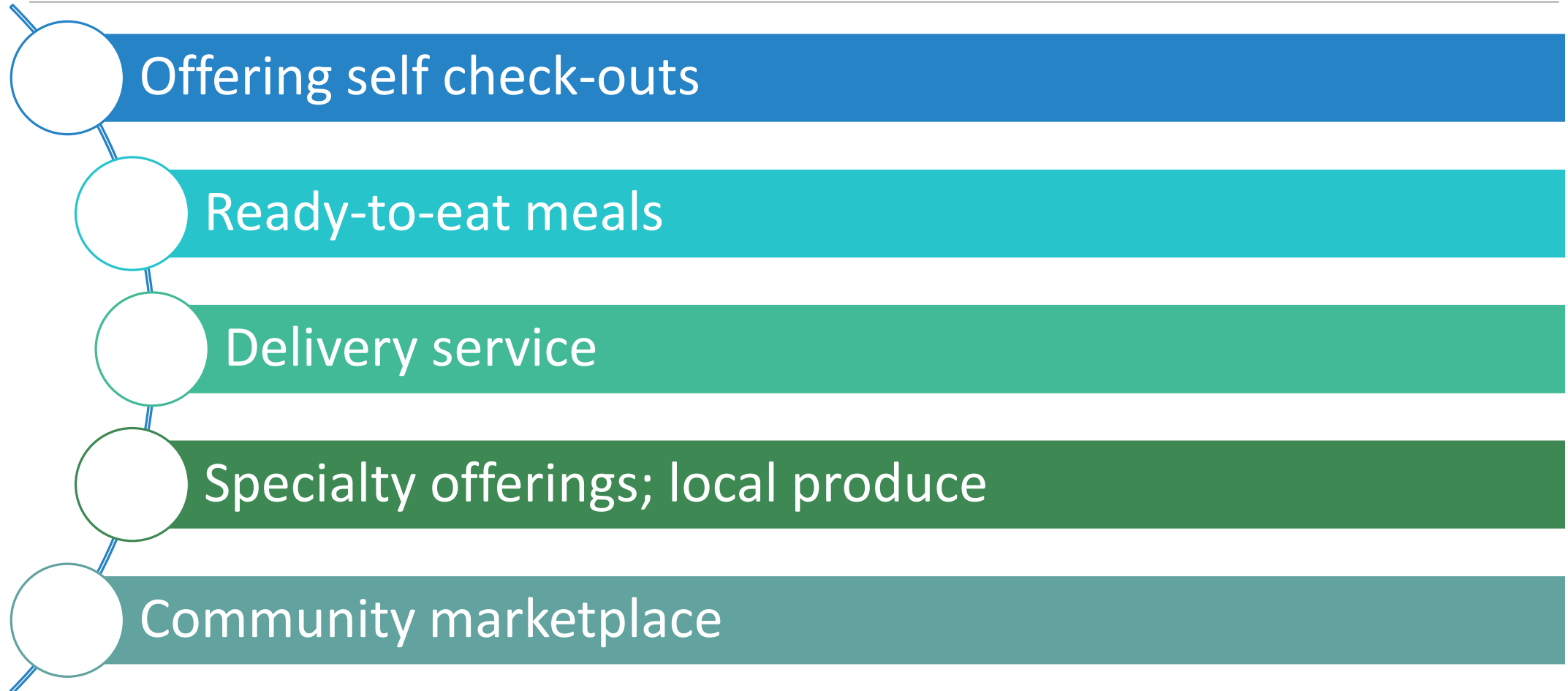
Industry Disruptors



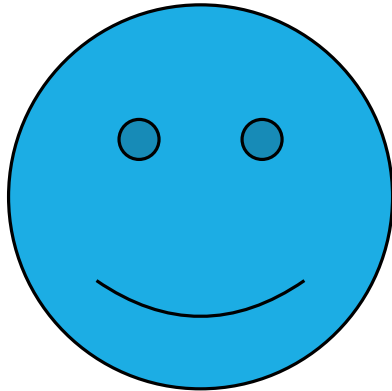
What are they doing about it?

JENNIFER BUTTON

Critique of Grocery Store Response



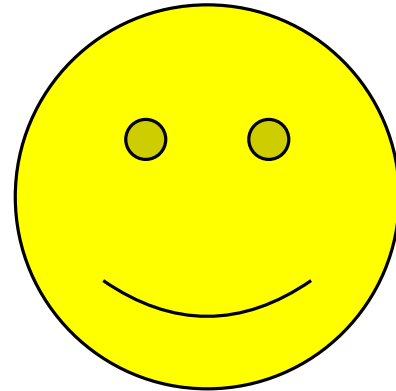
Customer Profiles



ELAINE, 35

Mother of 3

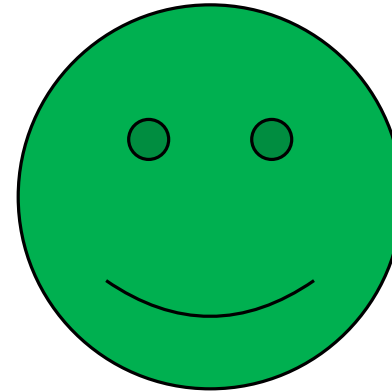
Ready-meals



TONY, 54

Sr. Accountant

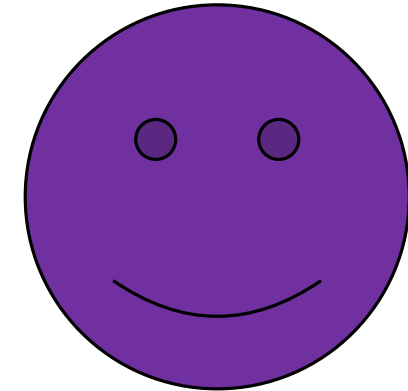
Delivery



JAY, 23

Software Developer

***Sustainable/
Trendy***



HELEN, 71

Retiree

Status Quo

So what else?

CHELSEY KING

Alternatives: Disrupt the Disruptors

Experience Shopping

- Live music
- In-store café
- Workshops and events
- Tasting stations

Mobile App

- Pre-select grocery items for pick-up
- Track points and apply coupons
- Predictive analytics and recommended add-ons
- Recipe suggestions based on past preferences

Eat or Be Eaten

DELIA WARREN

What Success Looks Like

- Maintain/recapture growth

Competing head on against disruptors

- Serve customers evolving needs

Implementing new features and services; building hype

- Avoid alienating traditional customer base

Maintaining brick and mortar locations

Questions?

THANK YOU!