



# Grocery Quarterly Index

## Q4, 2020

Analyzing dozens of brands including:



TRADER JOE'S



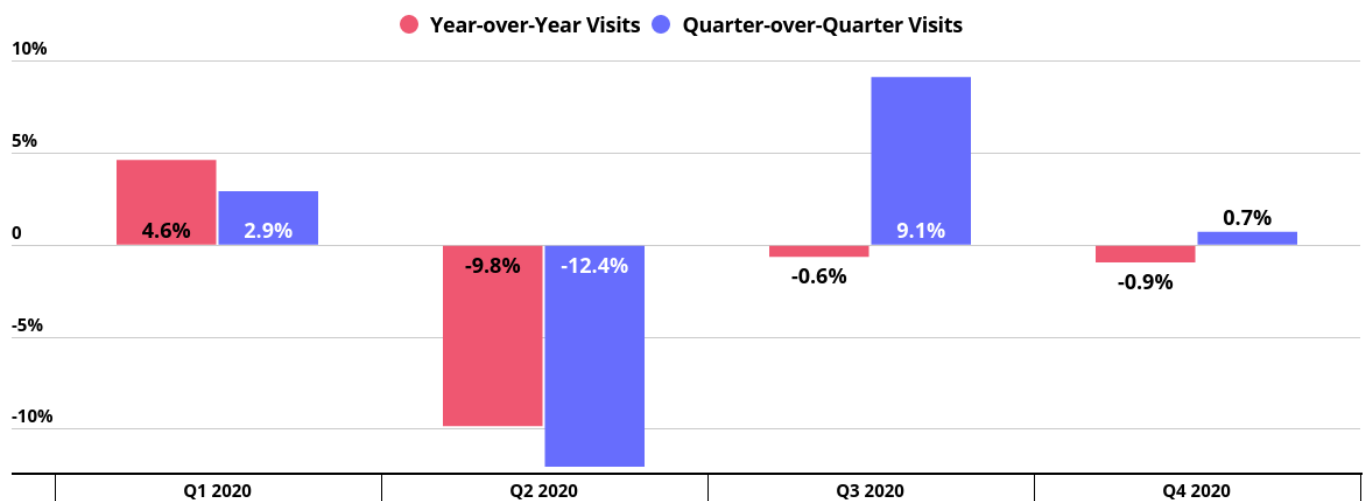
Albertsons



# Grocery Index 2020:Q4

Few sectors saw the same overall boost during COVID as the wider grocery sector. After seeing an initial surge in Q1 with visitors looking to stock up ahead of retail closures, the brands analyzed saw a fairly minor dip with visits down just 9.8% in Q2. But the second half of the year saw visits only slightly under 2019 levels with visits down 0.6% in Q3 and 0.9% in Q4. Could this indicate an even stronger year in 2021?

## Quarterly Grocery Visits



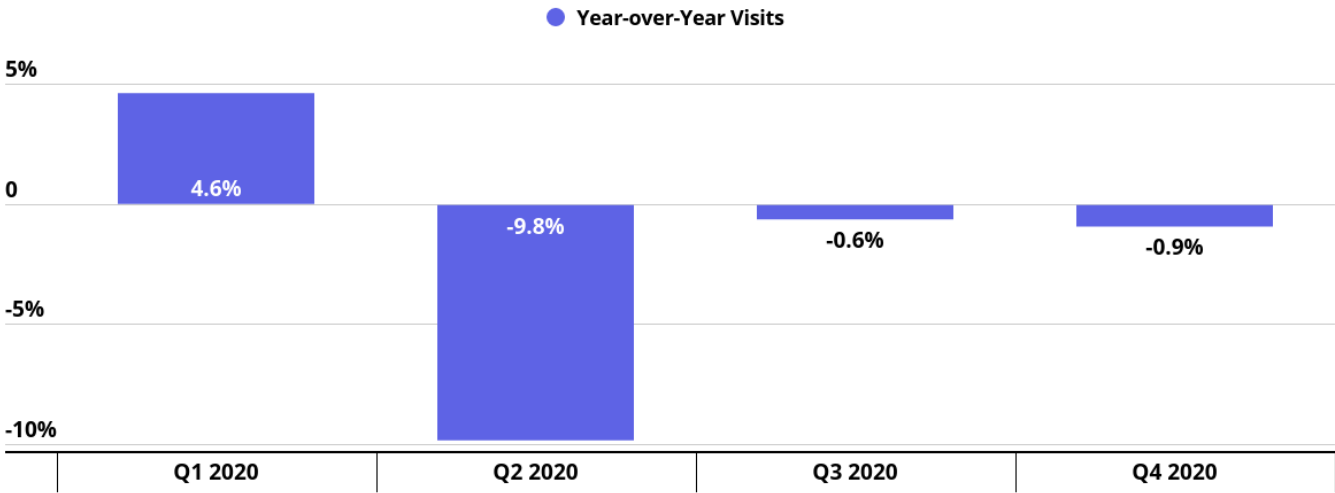
# Grocery Visits Recovering

The grocery sector was within just 1% of 2019 visit levels even with all of the unique obstacles set by the pandemic. And the sector's relative high could continue into 2021 as grocery brands tend to outperform in periods of economic uncertainty.

**-0.9%**

Q4 Visits were Down  
0.9% YoY

## Quarterly Grocery Visits - Year over Year



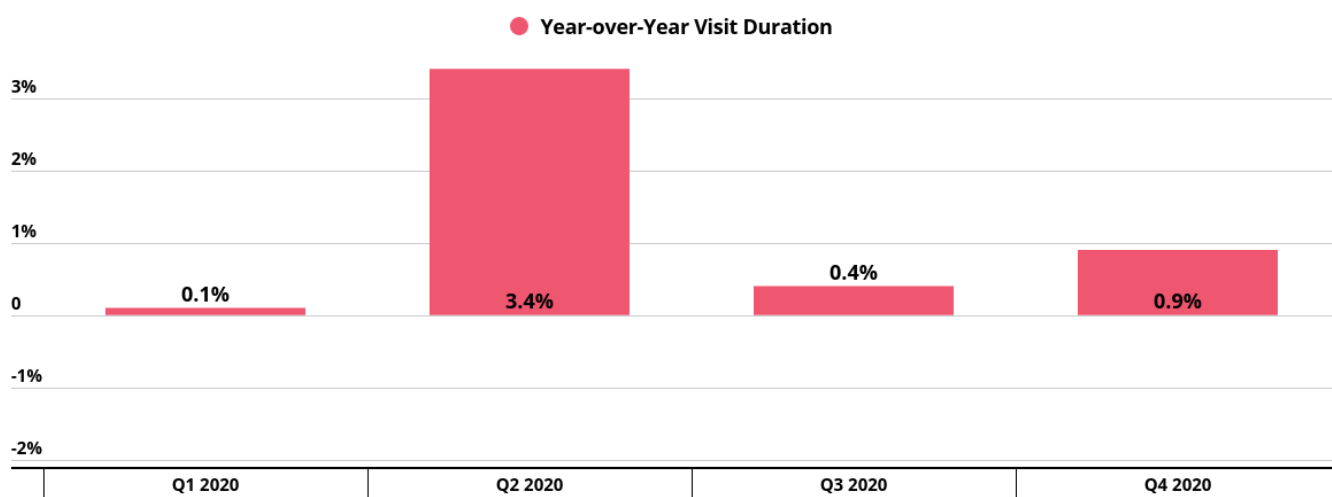
# Visit Duration Back Up

While visits were just barely down year over year, visit durations returned to growth in Q4. The 0.9% increase is a testament to the power of the grocery sector and the likelihood of larger than normal basket sizes. If this proves true, it could portend for a hugely significant finish to 2020 for this sector.

**+0.9%**

Visit Duration Rose  
0.9% YoY in Q4

## Average Grocery Visit Duration - Year over Year



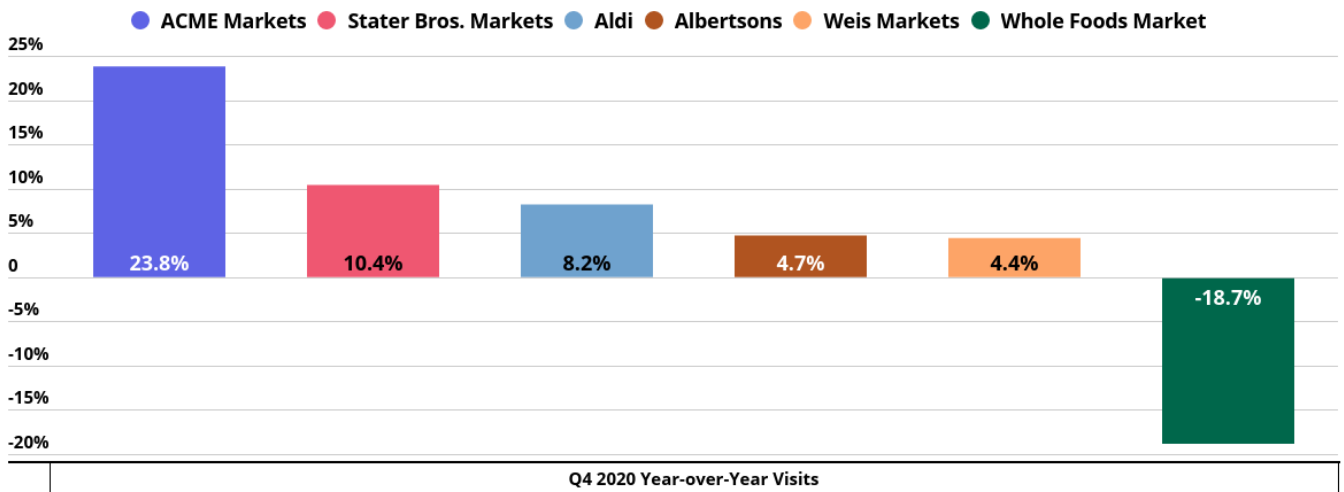
# Mixed Bag

The flat visit number for the group speaks less to uniform performance across all brands and more to the mixed results produced. While brands like ACME and Stater Bros. saw huge year over year increases, others saw a significant decrease. Whole Foods, facing a near-perfect storm of obstacles, saw visits decline 18.7% in the quarter, and are among the brands most in need of a rapid end to the pandemic.

**-18.7**

Visits for Whole Foods were Down 18.7% YoY in Q4

## Quarterly Grocery Visit Performance Varied



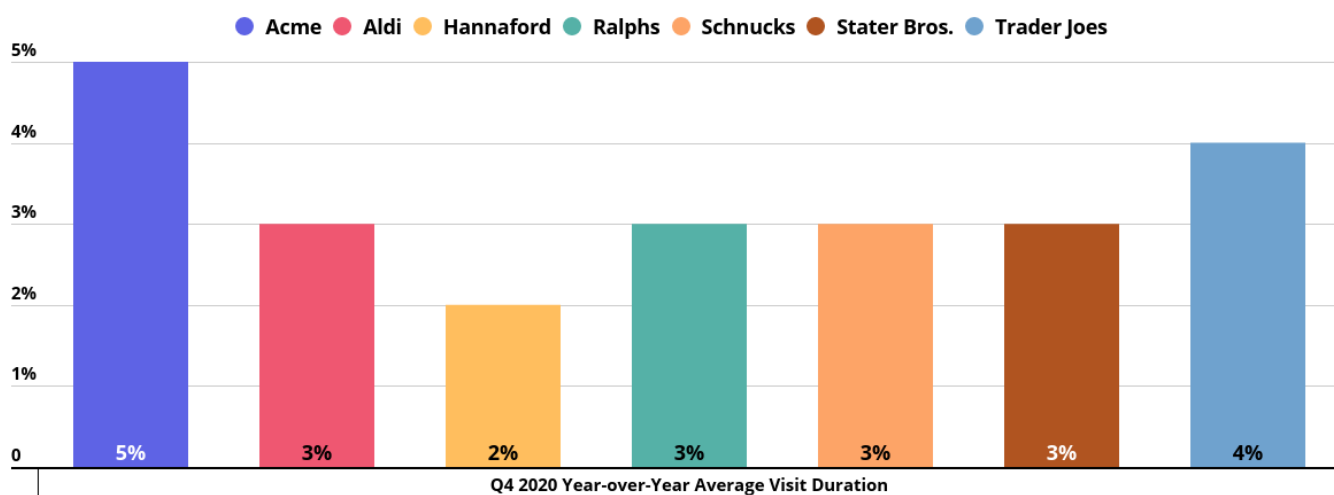
# Visit Durations Rise Across the Board

The overall jump in visit duration was driven by growth in this metric nearly across the board. Some brands that truly set the pace included Acme and Trader Joe's Markets with 5% and 4% year over year increases respectively. Walmart Neighborhood Market also put up strong year over year growth numbers alongside Placer.ai 2021 Winners Publix, Kroger, and Albertsons. The result could be a sign of things to come and may position several of these brands for dominant starts to 2021.

**+4%**

Trader Joe's saw Q4 visit duration rise 4%

### Average Grocery Visit Duration by Brand - Year over Year



# Summary

The wider grocery sector showed significant strength throughout the pandemic, but the continued growth in visit duration is especially important. The shift to mission-driven shopping was a huge component of retail during COVID, but should elements continue in 2021, the consequences could be very impactful. Traditional grocery brands seem uniquely well-positioned heading into the new year, while those struggling must rely on a rapid end to the pandemic.

