SHIFTING SHOPPING MISSIONS IN A CHANGING WORLD

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INTRODUCTION

Shoppers across the US visit stores for their food & beverage needs for many different reasons. These trip missions punctuate our lives and fill our homes with the ingredients for meeting our families' needs and creating shared moments of joy around drinking and eating occasions. **These include the iconic, big Stock Up trips to fill grocery baskets** in anticipation of all the traffic our pantries and refrigerators will get in the coming weeks, **Quick & Specific missions** when we realize we're out of coffee or eggs, **Meal Prep runs** after work to grab fresh ingredients for dinner, **or Close & Convenient visits to the c-store** for a drink and snack.[1]

These trip missions, however, have been **disrupted in recent years by** a combination of dynamic **macroeconomic factors, new technologies** offering unparalleled speed and convenience, **and changing shopper needs**.

In our latest installment, **pepviz® shines a light on the ways trip missions have evolved in recent years.** Sharing insights from our proprietary PepsiCo Trip Missions research, we'll offer the latest data & insights, **revealing strategies to win with shoppers across two of the most valuable trip missions today**.



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MACRO PRESSURES ARE RESHAPING SHOPPER HABITS

Shoppers continue to adapt to a dynamic retail environment. As of Q2 2026, **81% of shoppers were still making adjustments in anticipation of higher prices** by reducing overall spend, cutting indulgent items, and purchasing only the essentials.[2]

That said, shoppers **continue to avoid making cuts to grocery and gas budgets, choosing instead to reduce more discretionary spending, led by dining out.** Almost 7 out of 10 Americans say they'd spend less dining out to save money, down -2% points vs. last quarter. Intentions to make cuts to entertainment, larger purchases, and apparel also top the list, and the situation remains dynamic as shoppers continue to leverage a variety of tactics to manage their budgets.[3]

One caveat on dining out. **Away from home traffic actually increased slightly 0.9% at the end of Q1 2026 (vs YA)**, reinforcing the fact that even as shoppers aim to save, they continue to **prioritize experiences that deliver joyful moments.**[4]

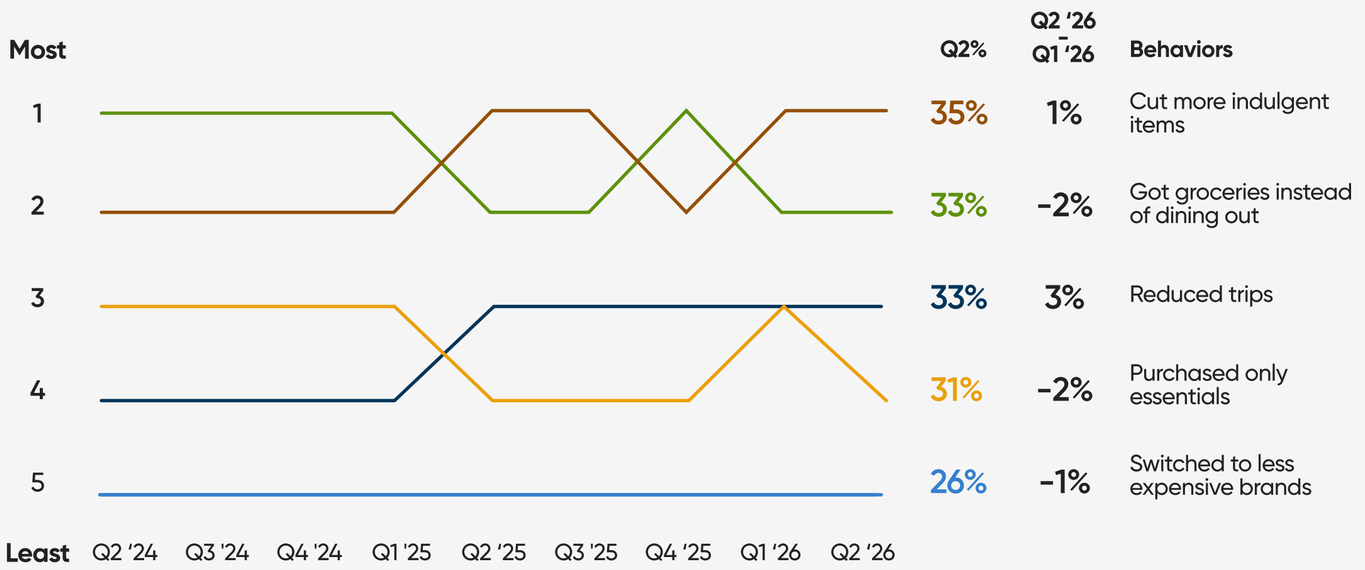
IF YOU NEEDED TO REDUCE SPENDING, WHICH AREA(S) WOULD YOU PRIORITIZE REDUCING?

Categories	Q2 %	Q2 '26 vs Q1 '26
Dining Out	67%	-2%
Entertainment	57%	-1%
Larger Purchases	49%	-2%
Apparel	48%	0%
Travel	46%	+1%
Home Goods	39%	-1%
Gift Purchases	37%	-2%
Gatherings	31%	+1%
Gas / Fuel	15%	+5%
Groceries	13%	0%

Shoppers say that the **top two ways they saved money** in the past 30 days was by **cutting out more indulgent items and choosing to buy groceries rather than dining out**. More than one-third of shoppers did so, making fewer indulgent purchases and more grocery shopping the main ways shoppers have managed their food & beverage spending over the past two years and counting.[5]

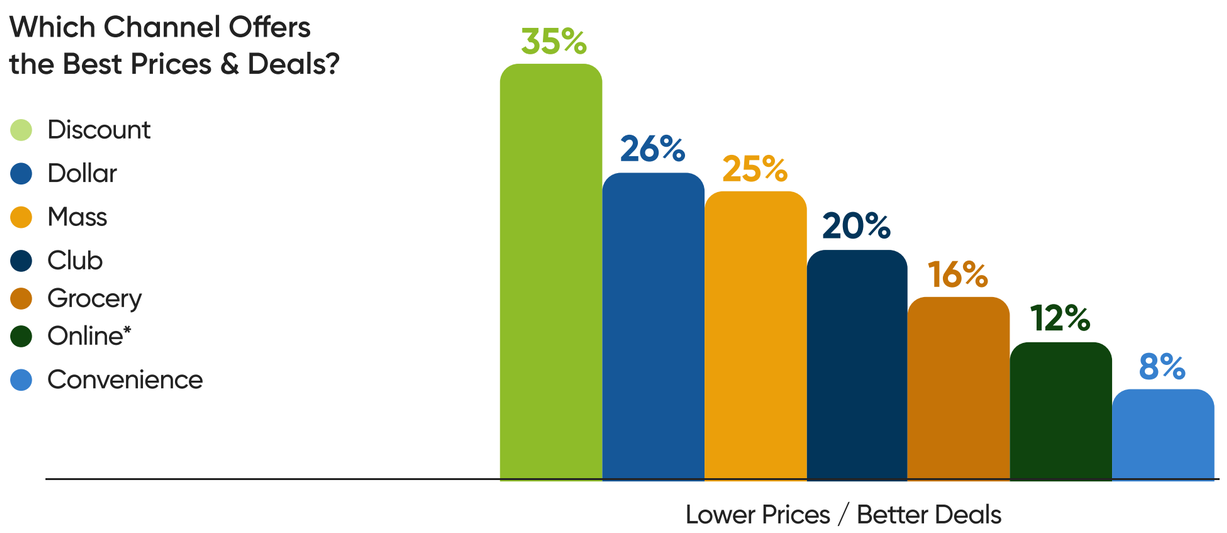
TOP WAYS TO MANAGE GROCERY SPEND

Behaviors Used to Manage Grocery Spending Ranked by Likelihood (Last 30 Days)



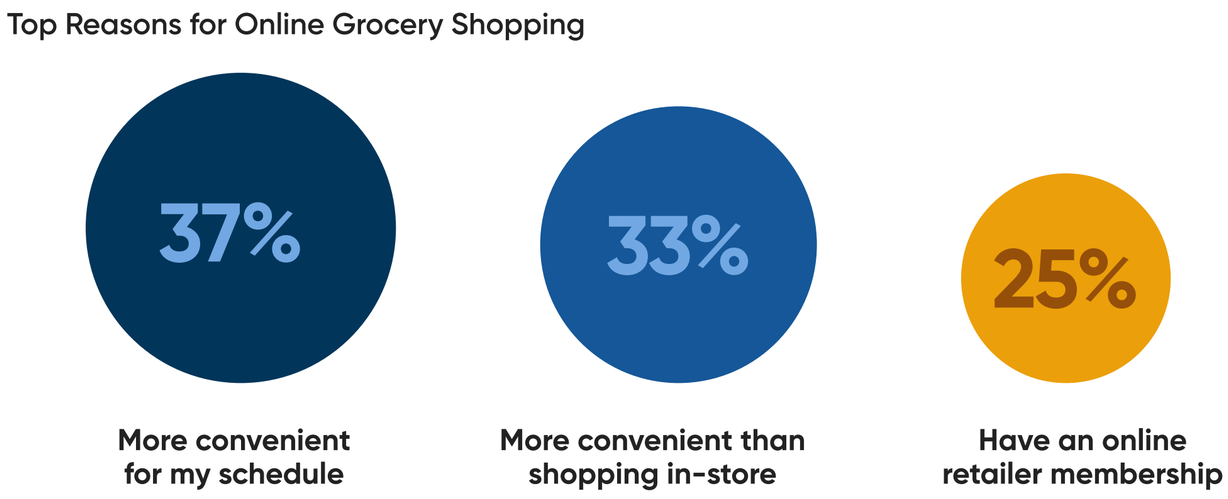
	Q2%	Q2 '26 vs Q1 '26	Behaviors
1	35%	1%	Cut more indulgent items
2	33%	-2%	Got groceries instead of dining out
3	33%	3%	Reduced trips
4	31%	-2%	Purchased only essentials
5	26%	-1%	Switched to less expensive brands

To save money, shoppers are also changing how often they shop across channels. **Having "better prices and deals" is the number one reason for shopping a channel more frequently**, which is outpacing the need for "convenience" and "looking for product variety." As a result, **Discount, Dollar, and Mass channels were chosen most often as offering these better prices and deals.**[6]



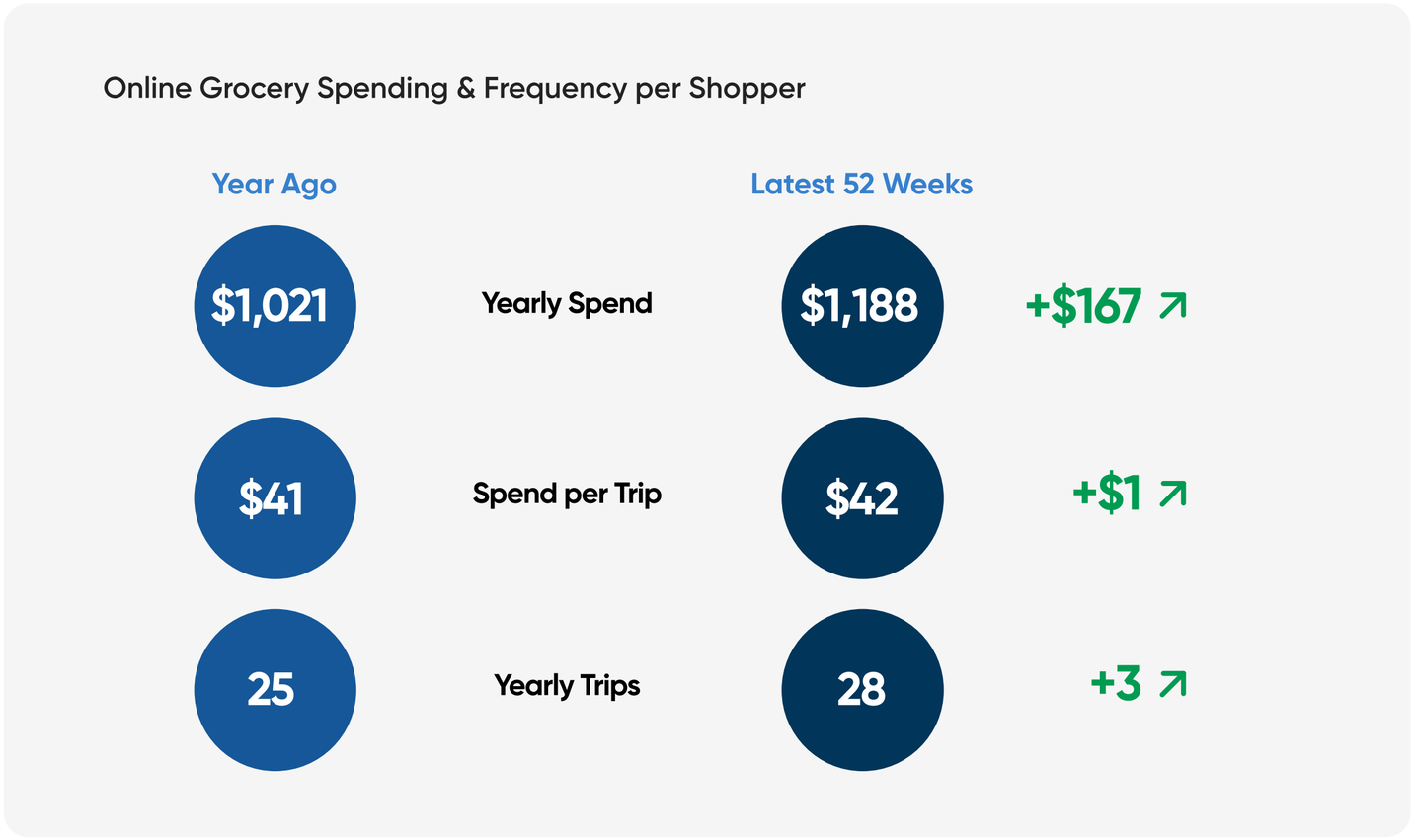
*Online = all eComm channels or modalities (Pure Play, eGrocery, Concierge, eConvenience)

Which is not to say that value is the only consideration or that other channels aren't growing. **Online shopping, in particular, continues to drive shifts** with more spend and trips sparked simply by the need to save time. And that's the number one reason shoppers give for shopping online - **"it was more convenient for my schedule."** "More convenient than shopping in-store" and "have an online retailer membership" are the next most cited reasons for shopping for food and beverages online.[7]



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More than **70% of U.S. shoppers made at least one online grocery trip last year**, with nearly three-fourths of online shoppers now habitual, repeat shoppers. Spend per trip remained relatively flat, up just $1, but shoppers made three additional trips per year on average. That **increase in trip frequency delivered a meaningful lift (+16%) in annual online grocery spend per shopper** from February 2025 to end of February 2026.[8]



Finally, online shopping increasingly delivers benefits beyond convenience, supporting both budget optimization and basket maximization. Nearly 25% say online shopping "**makes it easier to manage my grocery budget,"** while lower-income shoppers over-index on using online shopping because it helps them **"buy the most items for my grocery budget."**[9]

TRIP MISSIONS REVEAL DIFFERENT SHOPPER MOTIVATIONS

Shoppers today are navigating uncertainty by **shopping seamlessly across channels, balancing savings, speed, and convenience** depending on the occasion.

To understand how these macro trends shape different store trips, **PepsiCo leverages its proprietary Food & Beverage Trip Missions research** to examine shifts through the lens of shopper motivations. These insights play a significant role in reflecting today's omnichannel reality and **help retailers attract new shoppers, build loyalty, and drive growth by optimizing assortment, pricing, merchandising, and promotions** while also providing a real-time view of how missions are changing across their stores and competitors so strategies can quickly adapt to evolving demand.

THE BIG PICTURE VIEW: THREE SUPER MISSIONS

First, **Trip Missions can be grouped into three aggregated Super Missions**, offering a simple, strategic lens on shopper behavior to make these insights more actionable. Collectively, they reveal how shoppers navigate planning, immediacy, and enjoyment across food & beverage trips today.[10]

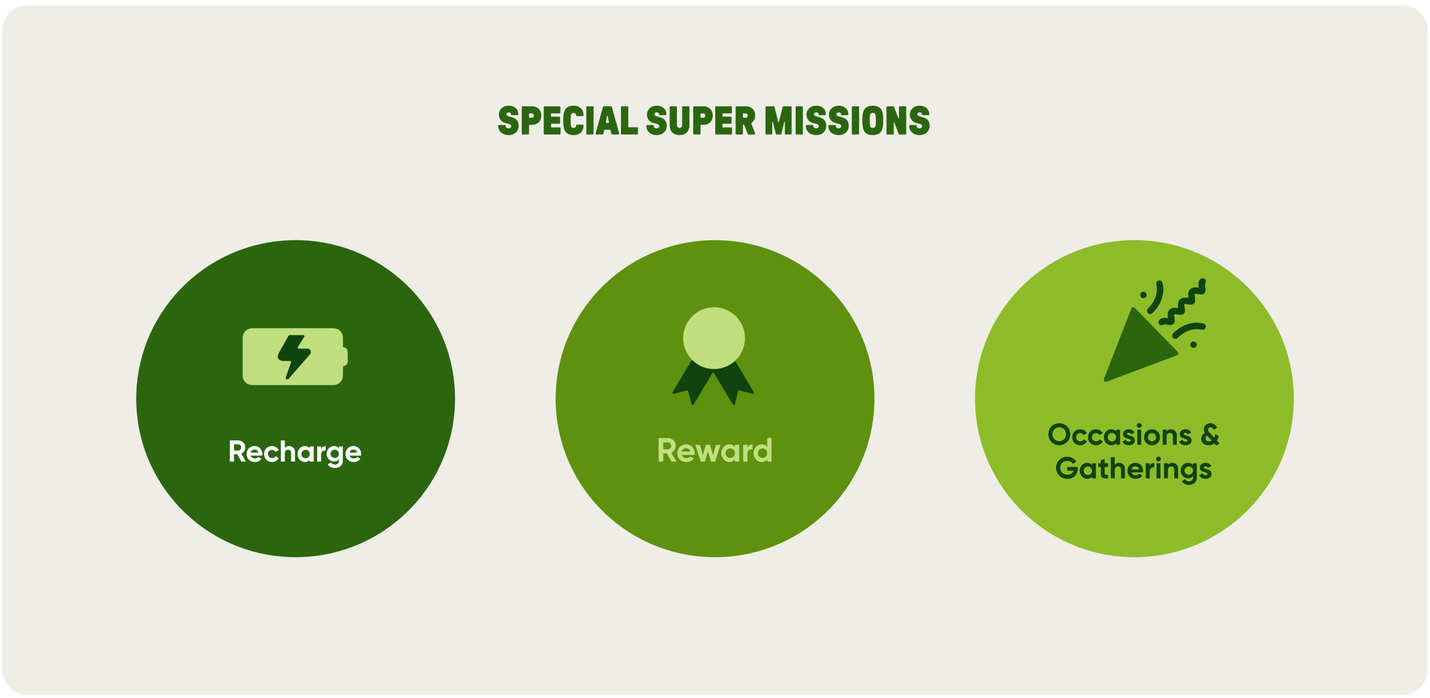
Planned Super Missions account for half of the dollar value and just under half of all trips. These represent more thought-out or "strategic" stock up, meal prep, and value-seeking shopping missions.



Fill-In Super Missions are more "tactical," more grab-and-go and supplementary to larger trips. They satisfy niche, quick, and specific needs, often driven by the need for speed and convenience. These account for about one-third of all trips in terms of both trip frequency and dollar value.



Special Super Missions tend to be driven either by special occasions such as social gatherings or more spontaneous desires to refresh, recharge, and reward ourselves. These smaller mission types make up the other 14% of dollar and 18% of trip frequency share.



INDIVIDUAL TRIP MISSIONS: DIGGING DEEPER

Each Super Mission can be further sub-segmented for a more granular look at what shoppers' key objectives, selection influencers, channels, and pre- and during-shopping activities are. They also reflect different trip frequencies and dollar values.

	9 TRIP MISSIONS SUMMARY	% of Trips	% of Dollars
PLANNED	Stock Up	22%	28%
	Meal Prep	13%	14%
	Get a Deal	9%	9%
FILL-IN	Unique Needs	10%	9%
	Close & Convenient	11%	8%
	Quick & Specific	18%	18%
SPECIAL	Recharge	8%	6%
	Reward	5%	4%
	Occasions & Gatherings	5%	4%

Stock Up trips, for example, remain the most frequent and most valuable, both in total and on a per-trip basis. And that makes sense, since these are the traditional big grocery shopping trips for restocking refrigerators and pantries. Considering what we've already seen about shoppers turning to grocery shopping more than dining out, it's not surprising to learn that, between 2024 and 2025, Stock Up trips increased 4.1% in terms of number of trips and 3.3% in terms of dollar value.

Quick & Specific trips are the second most frequent and second most valuable Trip Mission type in terms of dollar share. Reupping items that may have run out or picking up a few additional items, Quick & Specific trips were also up in 2025, 3.2% in terms of trips, and 5.1% in terms of dollar value.

The Trip Mission that grew the most last year was Get a Deal. These trips are undertaken specifically to take advantage of a sale, offer, or coupon. And, in a time-crunched world, **Close & Convenient missions also grew 7.5% in trips and 10.9% in dollars.**[11]

Together, **Stock Up and Quick & Specific missions account for 40% of all trips and 46% of all dollars spent on food & beverage retail channels,** making them the most critical Trip Missions for retailers and manufacturers alike.[12]



WINNING WITH STOCK UP AND QUICK & SPECIFIC TRIPS

Let's take a quick top line look at the unique shoppers, needs, channels, and shopping activities defining each mission type.[13]

Stock Up

Trips **22%** Dollars **28%**

To stock up on food or beverage and/or household items that someone in household requested

Quick & Specific

Trips **18%** Dollars **18%**

To quickly fill in with a specific food or beverage item(s)

STOCK UP: MORE HABITUAL & PLANNED

Looking at Stock Up, this mission to refresh household food & beverage supplies makes freshness and quality ingredients critically important. This mission type also **significantly over-indexes for Walmart and Club**, due to the importance of selection assortment, especially when it comes to having household staples in stock. Notably **31% of all online grocery shopping trips are Stock Up** missions.

To win this trip, retailers should demonstrate ways of using familiar products in new & relevant ways. More specifically:

- **Targeting mostly Boomer and Gen X shoppers, but don't forget about Gen Z and Millennials** who represent 30% of Stock Up trips and rising due to growing family sizes and purchasing power
- **Prioritizing always-in-stock, well-rounded assortments** by strengthening inventory and fresh selection, enabling trip completion in one stop
- **Promoting variety, versatility, and large/multipacks** to meet the needs of different family members
- **Simplifying search, "findability," and basket building with digital tools** to deliver a seamless omnichannel experience, especially across Grocery, Mass, and Club

QUICK & SPECIFIC: FOCUS ON SPEED & FINDABILITY

Looking at **Quick & Specific** trips, we see that this grab-and-get type of mission **significantly over-indexes on high-turn perishables like dairy, fresh produce, and pet food.** When these kinds of items run out, we tend to quickly get out to replenish them. But today "running out to grab" can also mean clicking away. Given their immediacy, missions of this type are **the second most likely to be done online, with 16% of all online grocery shopping trips** being Quick & Specific missions.

But **while in store, to win with the Quick & Specific shopper, the shelf is king!** Making it easy for shoppers to find what they're looking for at shelf is critical to owning this trip type. To win this trip, retailers should focus on:

- **Eye-catching packaging** on the shelf that stands out to shoppers
- **In-store signage,** either digital or print, that clearly directs the shopper to what they need
- **Stocked shelves during the afternoons** as half of trips are made mid-day between 12pm-5pm
- **One-click add to cart options and "recently purchased" reminders** for common fill-in staples that minimize shoppers' cognitive load on their eComm trips



Stock Up		Quick & Specific
62%	% Unplanned	54%
86% / 14%	Trip Fulfillment %: B&M / eComm	91% / 9%
Grocery, Walmart, Club	Channel	Grocery, Walmart, Club
eGrocery Pickup, eGrocery Delivery, Concierge	eCommerce Fulfillment Modality	Concierge, eGrocery Delivery, eGrocery Pickup

● Index >120

PRIORITIZE LEVERS RESONATING WITH GEN Z & HISPANIC SHOPPERS

A final central reason to keep an eye on Stock Up and Quick & Specific Trip Mission types is that **these missions are also the top mission types for Gen Z and Hispanic shoppers**, the two fastest growing shopper cohorts in terms of size and value.[14,15,16]

To win with both demographic cohorts, **play up the reward of on-the-go convenience while also leveraging the desire for something new** and different, like innovative items. Then for each:

	Key Ways to Win	Index
Gen Z Shoppers	• Help them make a digital list • Easily surface prices they're looking at • Enable shop-later options • Offer coupon suggestions	137 121 133 123
Hispanic Shoppers	• Cater to households with kids • Provide meal bundle suggestions • Offer digital shopping list suggestions	122 136 129

That's a brief overview of just the Stock Up and Quick & Specific Trip Missions. **We'd love to talk to you more about how to make the most of these and the seven other ways Americans shop today.**

WOULD YOU LIKE TO LEARN MORE?

During times of great transformation, it pays to understand the dynamics underlying how people shop. As shopper behavior turns towards more value-led, easy and convenient trips, understanding how trip missions are evolving can help retailers turn these latest PepsiCo proprietary learnings into winning strategies. **Reach out to partner with PepsiCo to better leverage these insights, anticipate shopper needs, and make your shoppers' missions more successful, rewarding, and delightful.**

Visit us to learn more at www.pepviz.com.



SOURCES

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