



Unlocking “Demand-Led” Growth

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PEPSICO

Winn  Dixie

A story...

Beaumont, Texas

1901



A story...

Spindletop

Beaumont, Texas



A story...



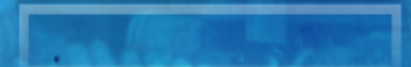
Mobil



TEXACO



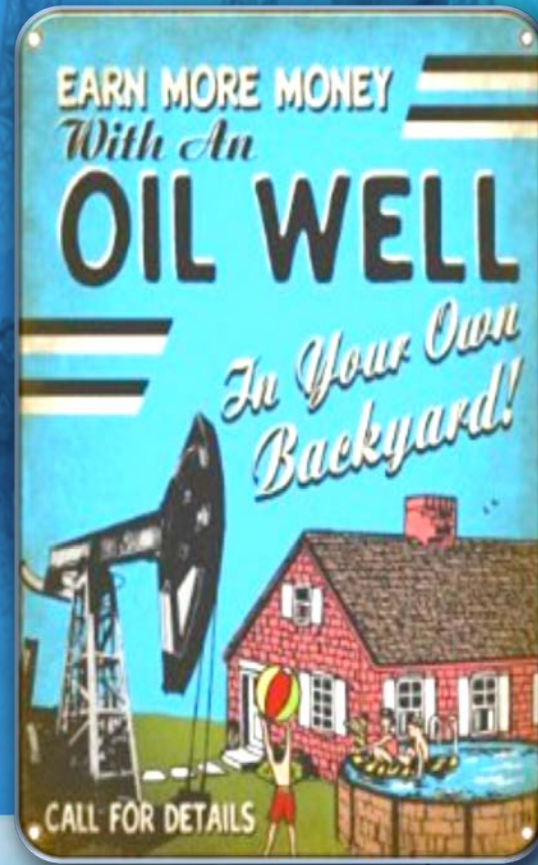
TEXACO



A story...

Times Were Good!

Beaumont, Texas



Industry globalized . . .



Ghawar Field,
Saudi Arabia

1948

Production matured & growth slowed . . .

U.S. Field Production of Crude Oil

Thousand Barrels



■ U.S. Field Production of Crude Oil



Source: U.S. Energy Information Administration

A breakthrough was required . . .

U.S. Field Production of Crude Oil

Thousand Barrels



■ U.S. Field Production of Crude Oil



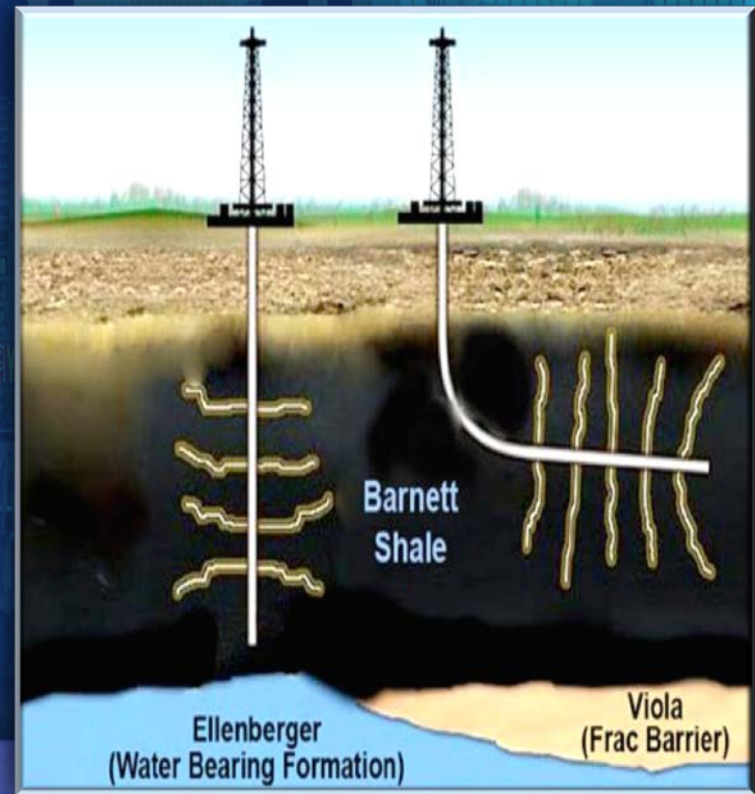
Source: U.S. Energy Information Administration

The breakthrough came in 2007 . . .



2007

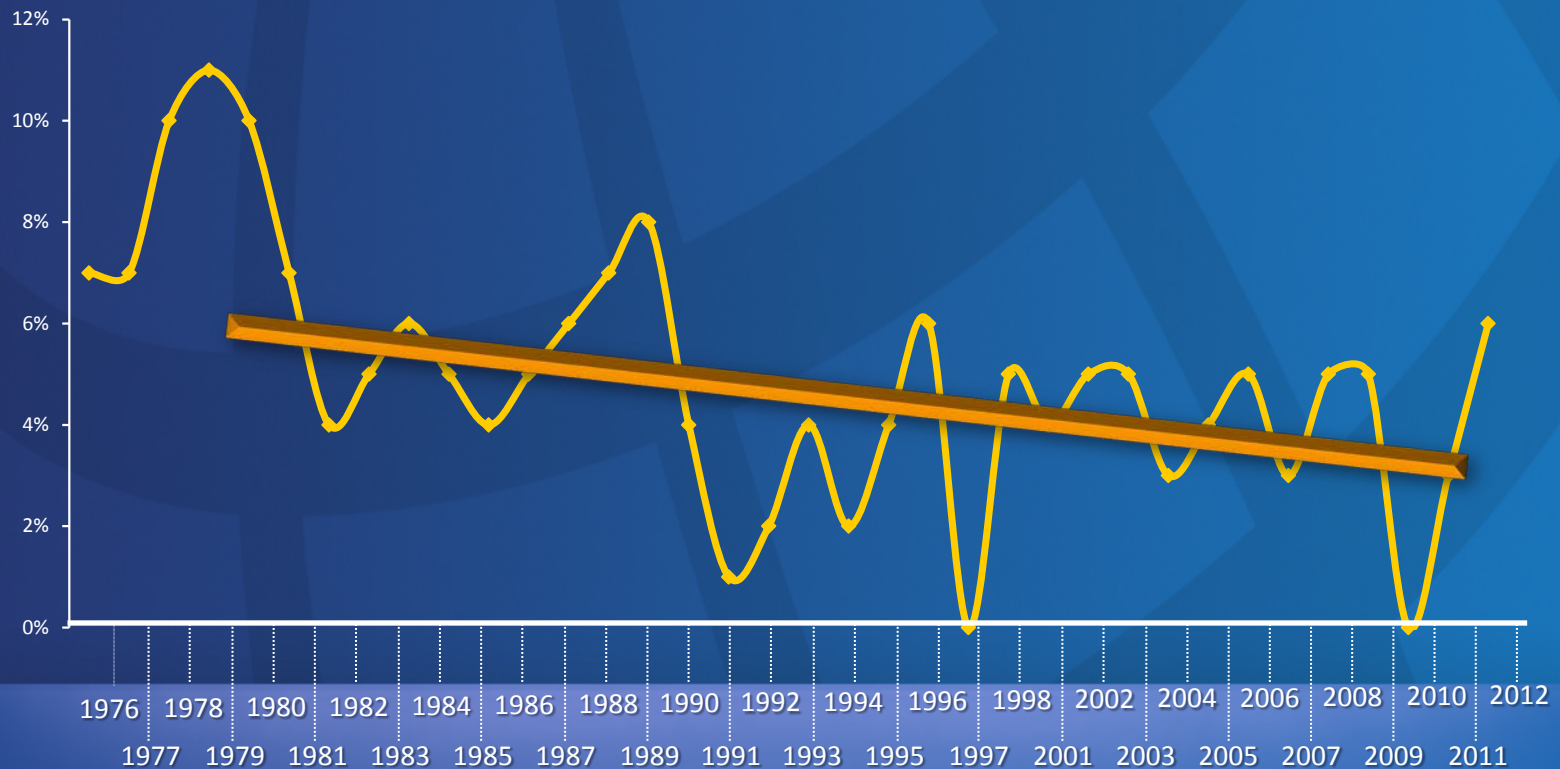
A breakthrough that re-ignited growth . .



Largest Onshore Reserve in US

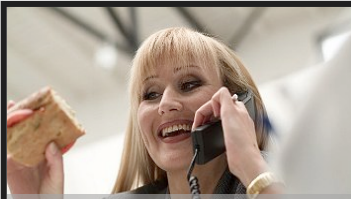
In the US, we also needed new ways to grow . . .

Historic Food At Home Sales Growth



Demand Moments provided a granular framework to fuel new growth...

Snack Demand Moments



Fuel Your Day



Party



Couple's Unwind



Family Fun



Young & Hungry



Midlife Treat



Enjoy and Indulge



Healthy Enjoyment

...by focusing on motivation of Demand



Young &
Hungry

Young, all-day hunger
break for tasty gut fill,
both IH and OOH

Transferrable Demand



Who



Where



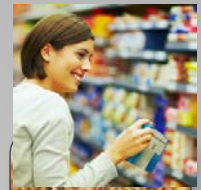
When



With



Why



Shopper

Informs strategy to activation

**The
Consumer**
(Who)



The Occasion
(WHERE, WHEN,
WHO WITH)



The Need
(Why)

HUNGRY
Indulgence
**Healthy
Snack**

The Shopper



**Portfolio
Strategy**

Communication

Innovation

Merchandising

Activation

And facilitates more aligned execution...



...leveraging our collective strengths



Together, we identified two opportunities...

Enjoy & Indulge



Indulgent, adult
“me time”, at home
in the evening

Fuel Your Day

Away from home, eat
on the go for a boost
through next task

...focused on two of our biggest businesses



Leading to two distinct programs



The Lay's DUAF program was designed to tap into Demand via digital platforms



In Store Activation



Facebook Activation

The app incented shoppers to try all three Lay's flavors



1. "Like" Winn-Dixie to participate



2. Vote for the next flavor of Lay's



3. One spin for prizes with each daily vote

Great category success



facebook®

215k+
app views



Like us on
Facebook

19%
Increase in "Likes"

Extend affinity with lunch



Adding Multi-pack to
Basket Increases Ring by

2X

Cracker MP



Cookie MP



FL Salty MP



AVG \$47



\$98

First installation!



Three takeaways



Solving for Demand leads to more
profitable growth



Digital is a powerful lever in granular activation



Journey of partnership and trust

