



How the world changed

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**Colloquium on Global Diversity:
Creating a Level Playing Field for Women**

September 9, 2021

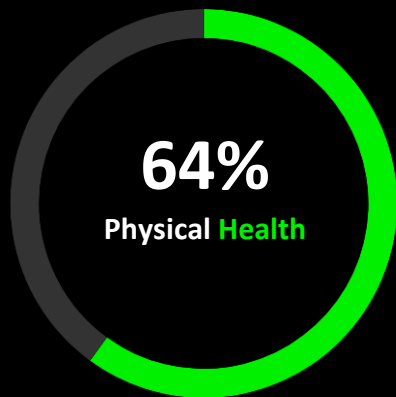


COVID was a catalyst for change.

As shoppers around the world begin shifting their pandemic perspectives, they're rewriting the norms of shopper behavior.

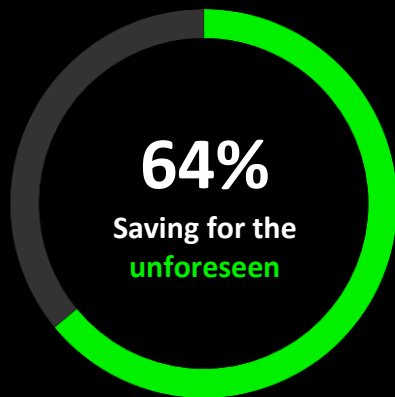
What is more important since COVID?

Global consumers are now prioritizing health & wellness



What is more important since COVID?

Global consumers are now prioritizing financial security



Where did consumers go?

Retail areas improve recently but no guarantees of return to normalcy

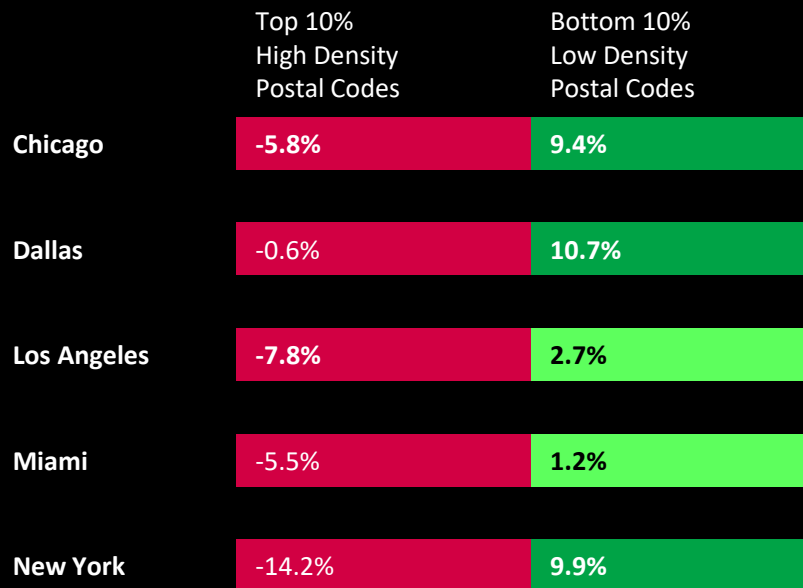
	Retail & recreation	Grocery & Pharmacy	Transit Stations	Workplaces	Residential	Parks
United States	-2%	+4%	-8%	-13%	-1%	+52%
France	+3%	+33%	+4%	+12%	-3%	+53%
United Kingdom	-14%	+1%	-30%	-2%	+1%	+45%
Italy	-18%	-6%	-10%	-5%	-4%	+44%
Belgium	+1%	+18%	-3%	+12%	+1%	+83%
Germany	-9%	+54%	-12%	+12%	0%	+110%
Denmark	+10%	+3%	-16%	+7%	-1%	+112%
India	-47%	-11%	-29%	-21%	+12%	-26%
Mexico	-6%	+19%	-1%	+17%	-1%	-20%
South Africa	-14%	+10%	-29%	-1%	+12%	-17%

Source: Google | COVID-19 Community Mobility Reports As at April 4 Compared to baseline - The baseline day is the median value from the 5-week period Jan 3 – Feb 6, 2020.

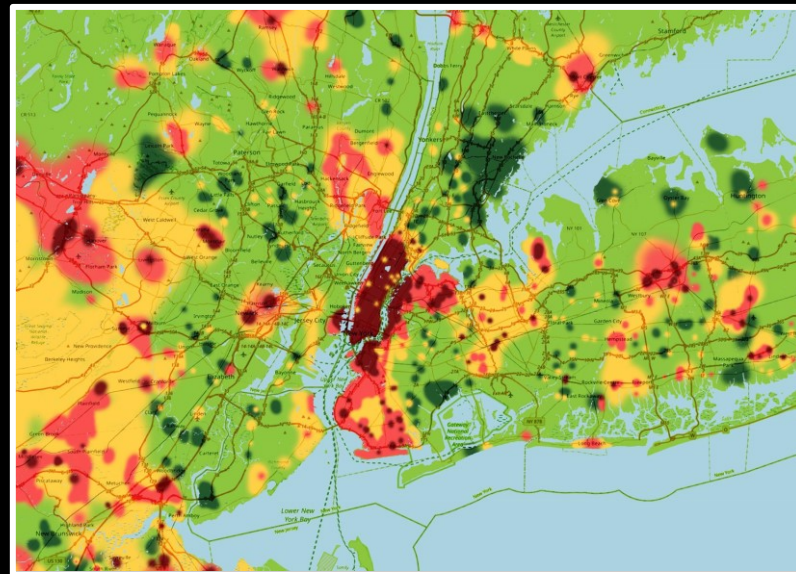
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Where did consumers go?

% Change in dollar share



New York



Source: Nielsen Retail Measurement Services. U.S store-level data within Syndicated Major Markets (SMM's), Mar.-Aug. 2020 vs year-ago

Source: Illustrative representation of Nielsen store level sales growth by location May – August 2020 vs 2019

What habits have shifted since COVID?

A significant shift toward the homebody economy

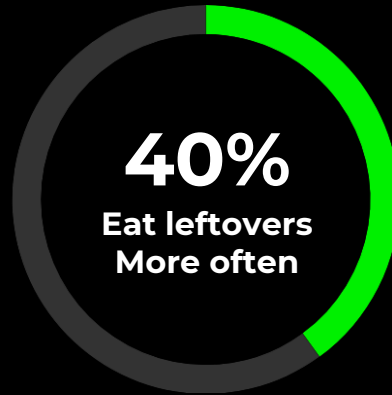
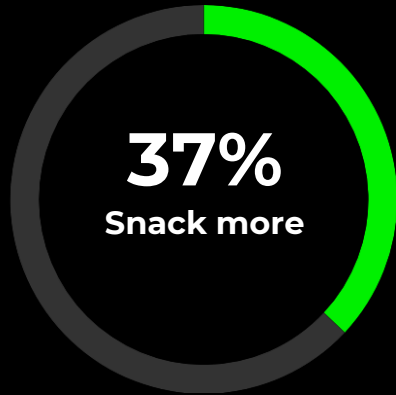
45% of U.S urban adults believe they will be working at home either part time or full time long term

*+14 Percentage points
that were not working from home pre pandemic*

Globally **29%** of woman are struggling with work life balance



U.S consumers snack more and eat more leftovers since COVID

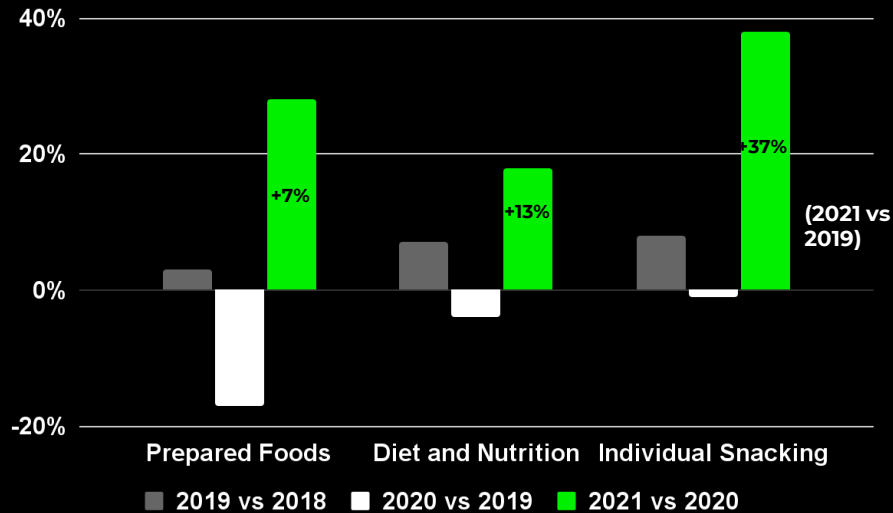


On-the-go CPG regains its relevance

On-the-go categories are seeing growth in 2021 as they lap an underperforming 2020

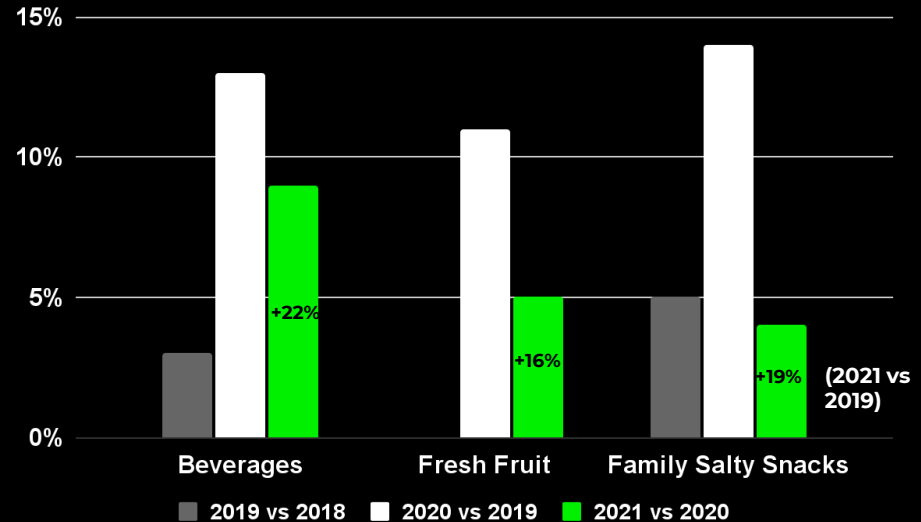
Growers comping poor COVID performance

\$ % change vs. YA



Growers continue to rise...

\$ % change vs. YA



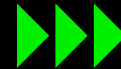
U.S. online sales forecasts look bright

Online purchasing habits established during the pandemic are expected to stay

Food & bev online snapshot	Online sales	% of total sales
2019	\$32 BN	5.1%
2020	\$69 BN	9.3%
2021 Low forecast	\$95 BN	13.2%
2021 Average forecast	\$103 BN	14.1%
2021 High forecast	\$109 BN	14.6%




Ecommerce penetration will continue to grow post-COVID




**Monthly rates calculated after looking at pre-COVID and COVID data, capping due to elevated base.*

U.S. Online preferences will continue to evolve


Who Considers:

32% of Millennials (+8 pts) 


22% of Boomers (+5 pts) 


Fulfillment method:

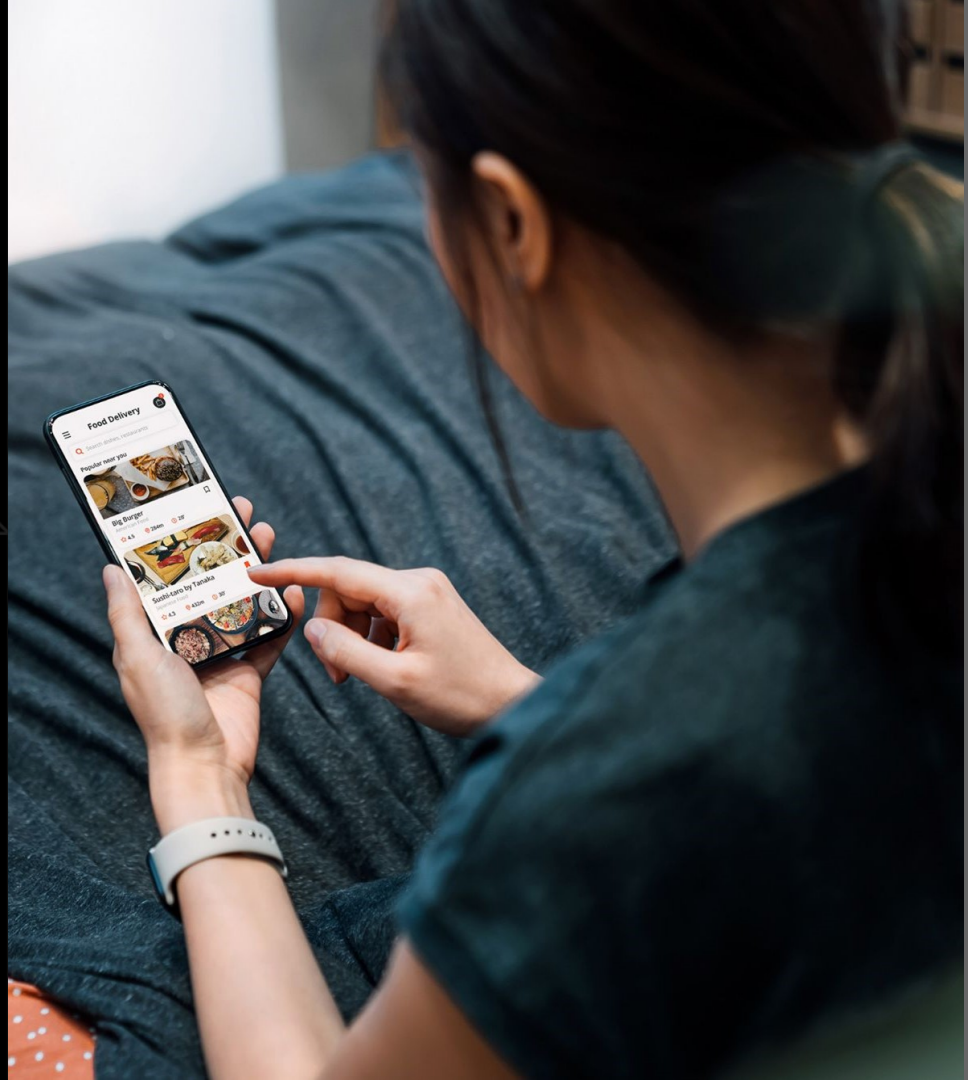
Next/Same Day Delivery (+7 pts) 

2+ Day Delivery (-11 pts) 

Reason for shopping online:

Easy Delivery Scheduling (27% , -2pts) 

Order History (26%, +8pts) 



Who is driving U.S. online growth?

For fresh online omni buyers

Over Indexing Demographics:

- Female
- Household size 5+
- Age 30-44
- College Graduate / Post College Graduate
- Mountain & West S Central
- Presence of kids under 18
- White Collar – Clerical/sales
- Unemployed

*Based on significant index > 120

Source: NielsenIQ Omnishopper Panel; Latest 28 weeks WE 7/17/21



What habits have shifted since COVID?

A change in consumer spending

1

46% of women are **newly constrained** consumers



46% = 46%

2

65% of women **changed** how they shop



66% > 65%

3

82% of women will continue to **restructure spending** in 2021



81% < 82%

What is more important since COVID?

Global consumers are now prioritizing social responsibility



44%
Supporting local
community



50%
Sustainability &
Environmental
practices



What consumers are more likely to buy

Growth in socially responsible business practices will endure

+8.3%

Social
Responsibility



B Corporation
+8%

Ethical +7%

Fair Trade +10%

+5.8%

Sustainable
Farming



Sustainable
Farming +5%

-1.0%

Sustainable
Resource
Management



Carbon
Footprint -2%

Water
Conservation
+3%

+5.9%

Sustainable
Forestry



Palm Oil Free
+5%

Forest
Stewardship
Council +8%

Rainforest
Alliance
Certified +4%

+4.6

Sustainable
Packaging



Recyclable +5%

Recycled
Packaging
Content -1%

Terracycle +5%

+6.4%

Animal Welfare



Farm Raised
+8%

Cage Free +7%

Grass Fed +5%

Free Range +8%

Pasture Raised
+8%

Q&A

