



How the world changed

NielsenIQ

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

October, 2021



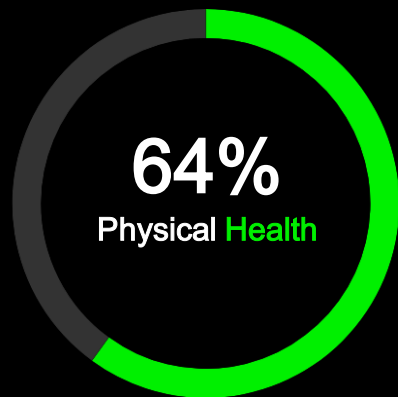


COVID was a catalyst for change.

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



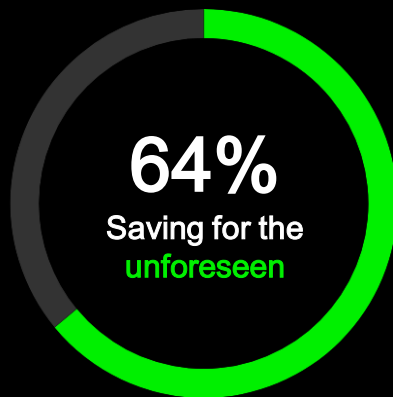
Mexico	79%
Thailand	66%
U.K	56%
Spain	63%

79%
66%
57%
67%



What is more important since COVID?

Global consumers are now prioritizing financial security



Mexico	73%
Thailand	64%
U.K	37%
Spain	58%

80%
67%
45%
61%



Where did consumers go?

Retail areas improve recently but no guarantees of return to normalcy

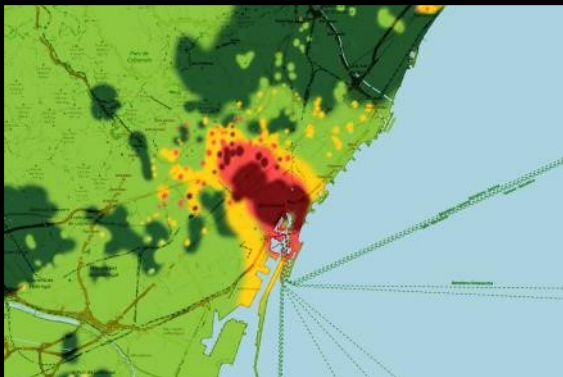
	Retail & recreation	Grocery & Pharmacy	Transit Stations	Workplaces	Residential	Parks
United States	-2%	+4%	-8%	-13%	-1%	+52%
France	+3%	+33%	+4%	+12%	-3%	+53%
United Kingdom	-14%	+1%	-30%	-2%	+1%	+45%
Italy	-18%	-6%	-10%	-5%	-4%	+44%
Belgium	+1%	+18%	-3%	+12%	+1%	+83%
Germany	-9%	+54%	-12%	+12%	0%	+110%
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.

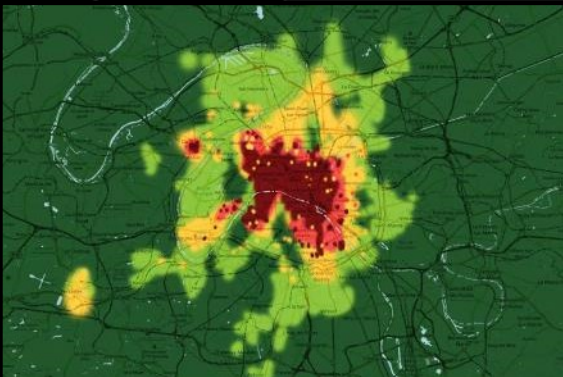
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Stores reliant on inner city commuters more likely to feel sales impact

Barcelona



Paris



London



> +15% growth

5 to 15% growth

-5 to +5% change

-5 to 15% decline

> -15% decline

What habits have shifted since COVID?

A significant shift toward the homebody economy

53% of global *urban adults* believe they will be working at home either part time or full time long term

+27 Percentage points
that were not working from home pre pandemic

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





Global Consumer preferences redirected

42%

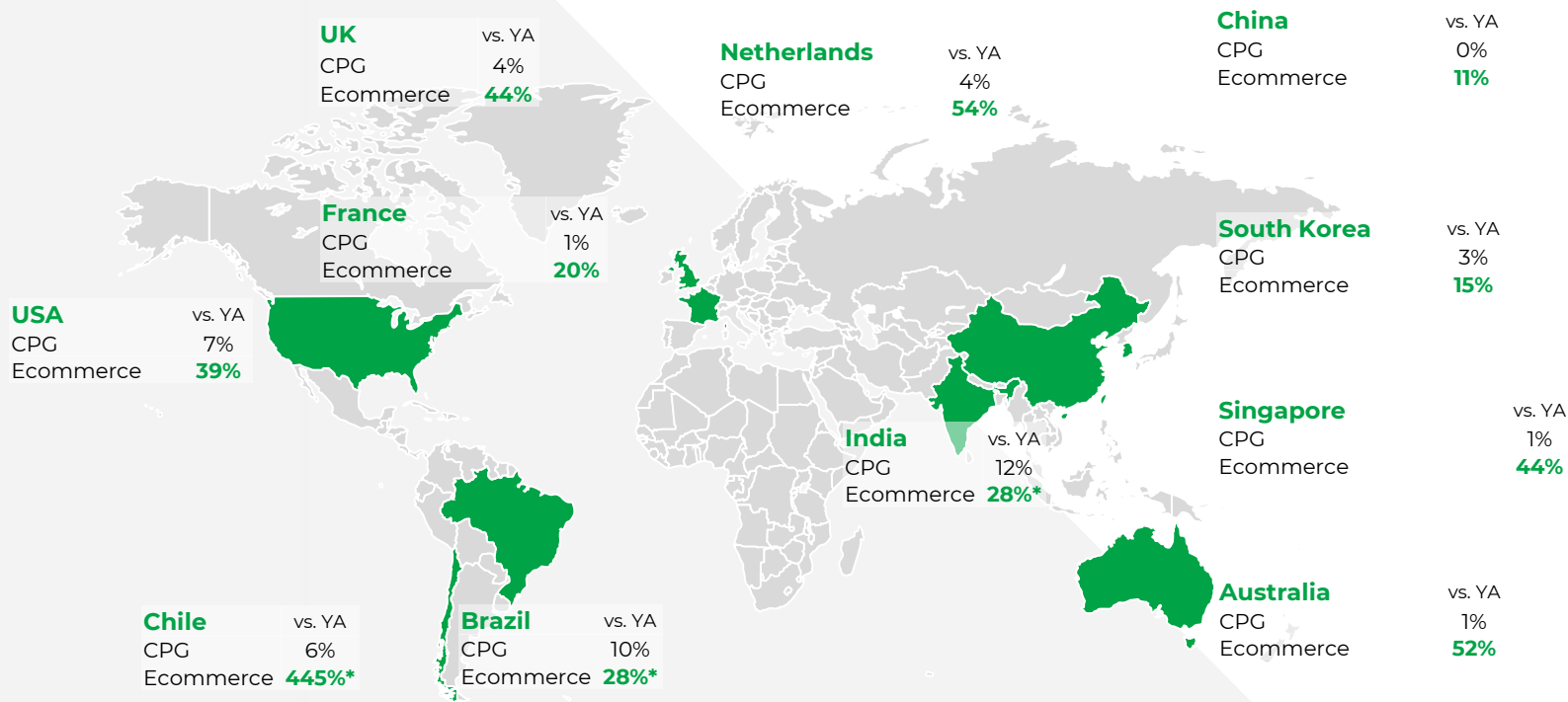
Shop online
because home to
receive deliveries

Mexico	29%
Thailand	53%
U.K	37%
Spain	31%



E-commerce still drives top line growth as shoppers adjust to living alongside COVID-19

% sales growth vs. year-ago by market



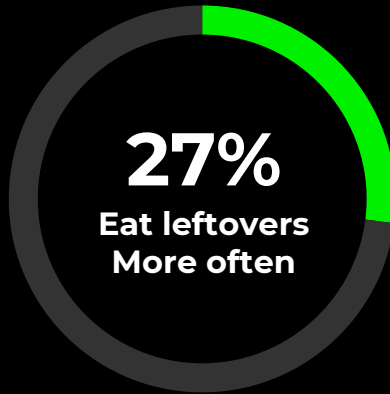
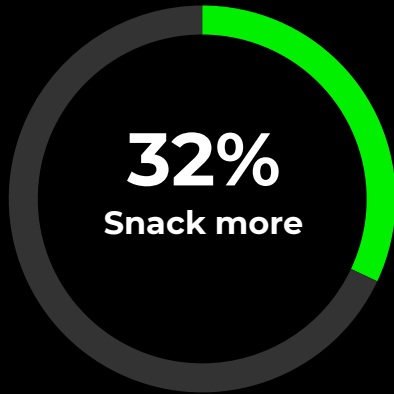
Source: NielsenIQ Retail measurement data. MAT vs YA

UK, France, Netherlands & Australia updated to July 21;

China, S. Korea, Singapore, India, US, Chile & Brazil updated to June 21;

*India E-commerce updated to May 21, Chile & Brazil E-commerce updated to April 21.

Global consumers snack more and eat more leftovers since COVID



Mexico	28%	21%
Thailand	23%	38%
U.K	35%	24%
Spain	36%	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%

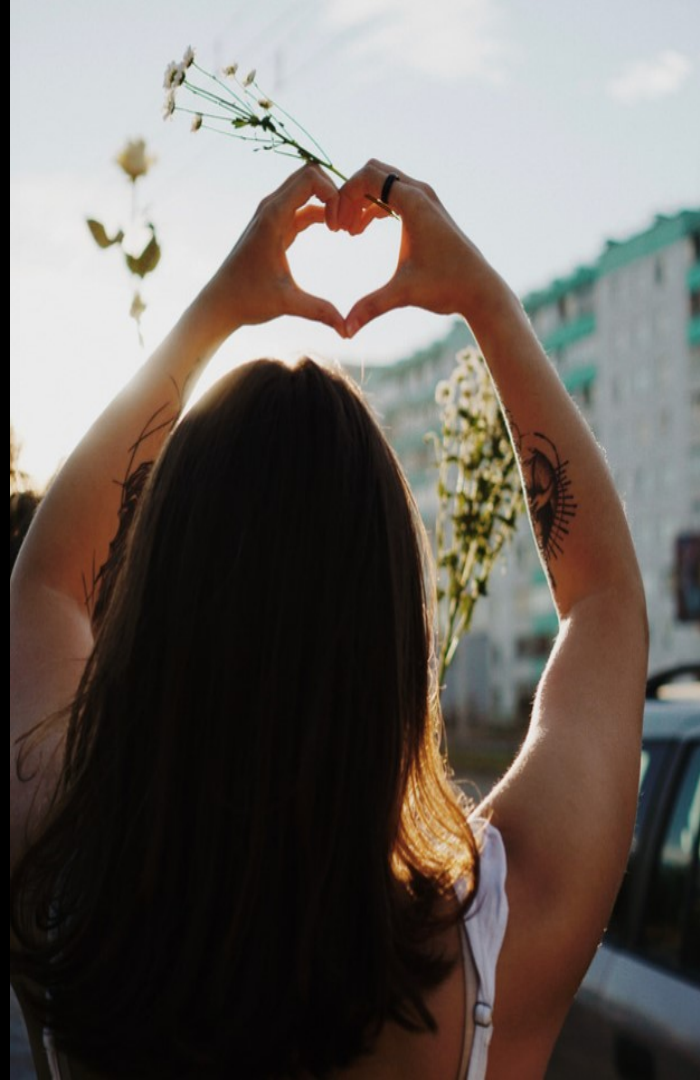
What is more important since COVID?

Global consumers are now prioritizing social responsibility

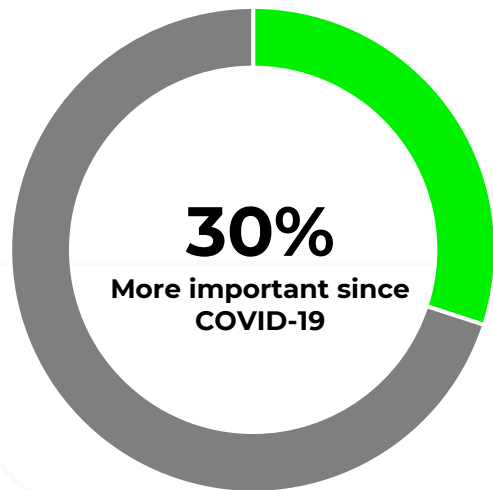


Mexico	49%
Thailand	43%
U.K	48%
Spain	49%

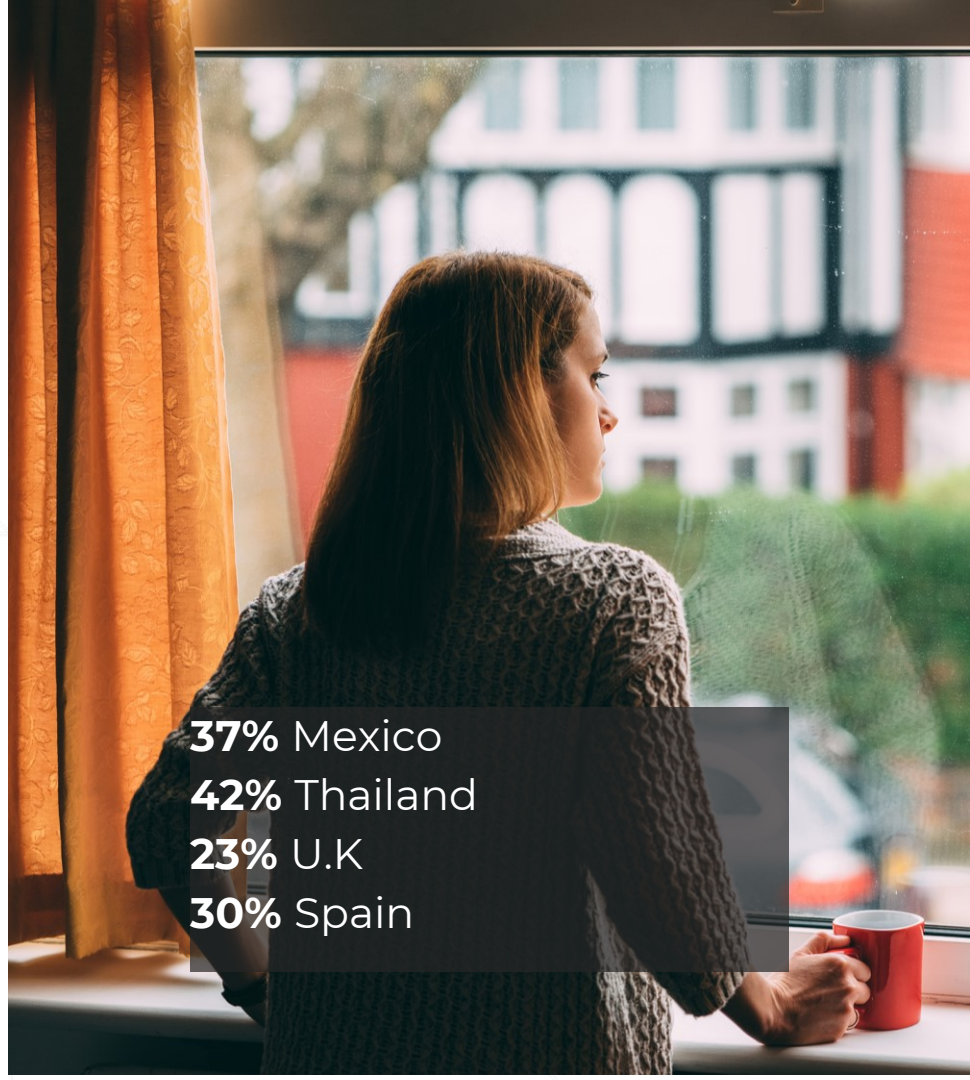
56%
55%
41%
47%



Global Support for diversity and inclusion (gender, ethnic, age, culture) has grown



■ More important



37% Mexico
42% Thailand
23% U.K
30% Spain

THANK YOU

