

SEEING & DECODING CRISIS SHOPPING AND CONSUMPTION BEHAVIOR: IN-STORE

This report has been prepared by NAILBITER in
collaboration with RB Shopper Insights



HEALTH • HYGIENE • HOME



- ▶ IN-STORE & ONLINE PURCHASE DECISIONS
- ▶ AT-HOME DELIVERY, STORAGE & CONSUMPTION
- ▶ MOST MAJOR CPG CATEGORIES
- ▶ US FOOD, DRUG, MASS, DOLLAR AND CLUB

▶ WEEKLY REPORTING

- ▶ March 25, 2020
- ▶ April 1, 2020
- ▶ April 8, 2020
- ▶ April 15, 2020

FOREWORD: WHY ARE WE PUBLISHING THIS REPORT?



“During these unprecedented times, we’re faced with questions that we as an industry must come together to answer. To that end, we’re excited to partner with RB to bring to light key changes in shopper behavior and the implications it has for manufacturers, retailers, and research suppliers. By illuminating through video what is going on in store, online, and at-home, we hope to humanize these evolving trends and empower our industry to serve our shoppers’ and consumers’ needs during this difficult time.”

Amishi Takalkar, CEO & Co-Founder, NAILBITER



“As all of us in the insights community work towards understanding the COVID-19 impact to our shoppers, consumers, and retailers, RB is excited to be able to partner with NAILBITER to illuminate the market situation and provide guidance to the CPG manufacturer and retailer community. At RB Insights, our goal is to get to learning and actions as quickly as possible without sacrificing quality...partnering with NAILBITER, we want to bring that to you too!”

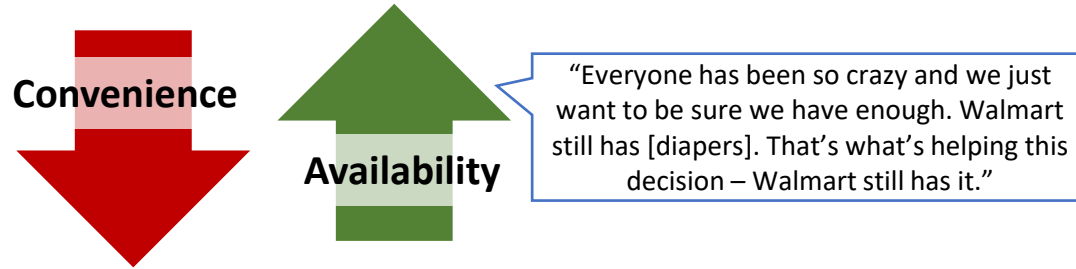
Yelena Idelchik, Director, Category & Shopper Insight, RB Hygiene/Home & Nathan Noertker, Team Lead – Shopper Outperformance, RB Health





DRIVERS OF RETAILER CHOICE

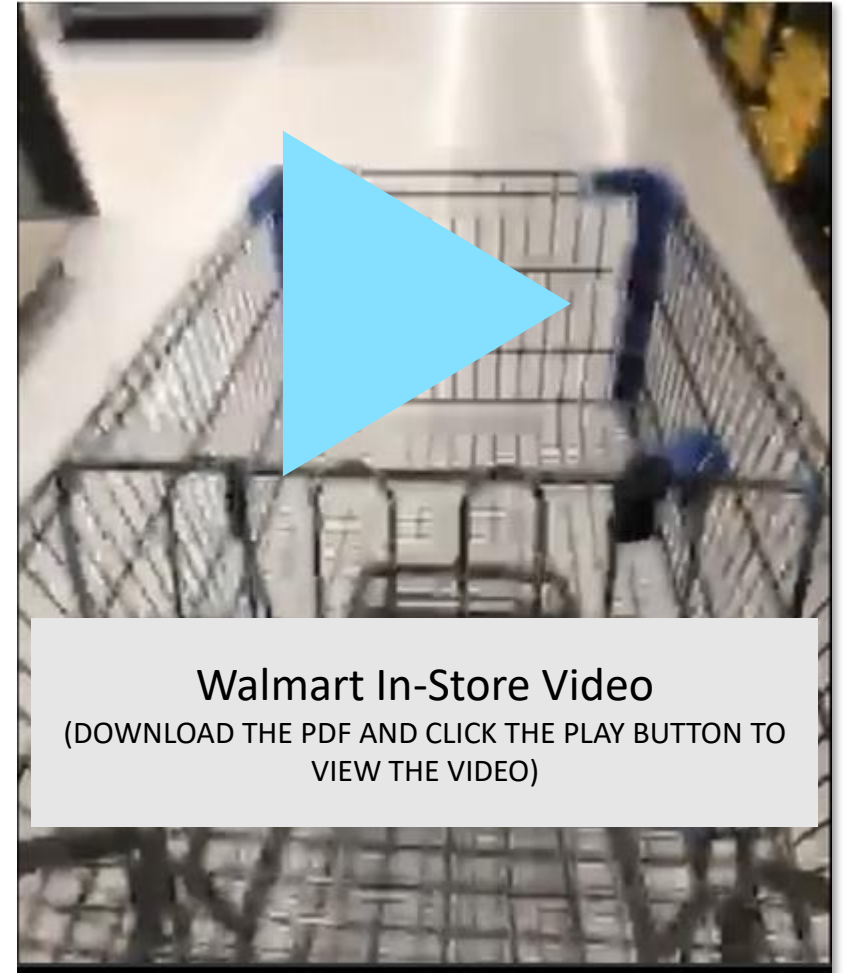
A major theme around retailer choice involves shoppers going to stores where they expect product to be available so they can find what they need, even if it is less convenient



Retailers who offer a variety of options or good value (or both!) are driving traffic during this crisis



Shoppers are trying to pick a time of day (early in the morning) when they expect the stores to be less crowded and shelves better stocked





DIFFICULTY ADJUSTING SHOPPING HABITS TO SOCIAL DISTANCING GUIDELINES

It is incumbent upon retailers to help enforce social distancing practices in their stores as shoppers may be finding it difficult to change their habits. Stores are often crowded, and shoppers may still be unnecessarily touching products.

WHAT ARE
CURRENT
GUIDELINES?

Practice Social Distancing & Remain At
Least 6 Feet From Other Shoppers

Minimize Contact With Physical
Products & Disinfect Products &
Surfaces Frequently

WHAT ARE
SHOPPERS DOING?



Social Distancing is Not Occurring in Crowded
Retail Environments



People Are Unnecessarily Touching Products

WHAT CAN
RETAILERS
DO?

Limit the number of shoppers in the
store at one time (like Costco has
implemented) to minimize crowds

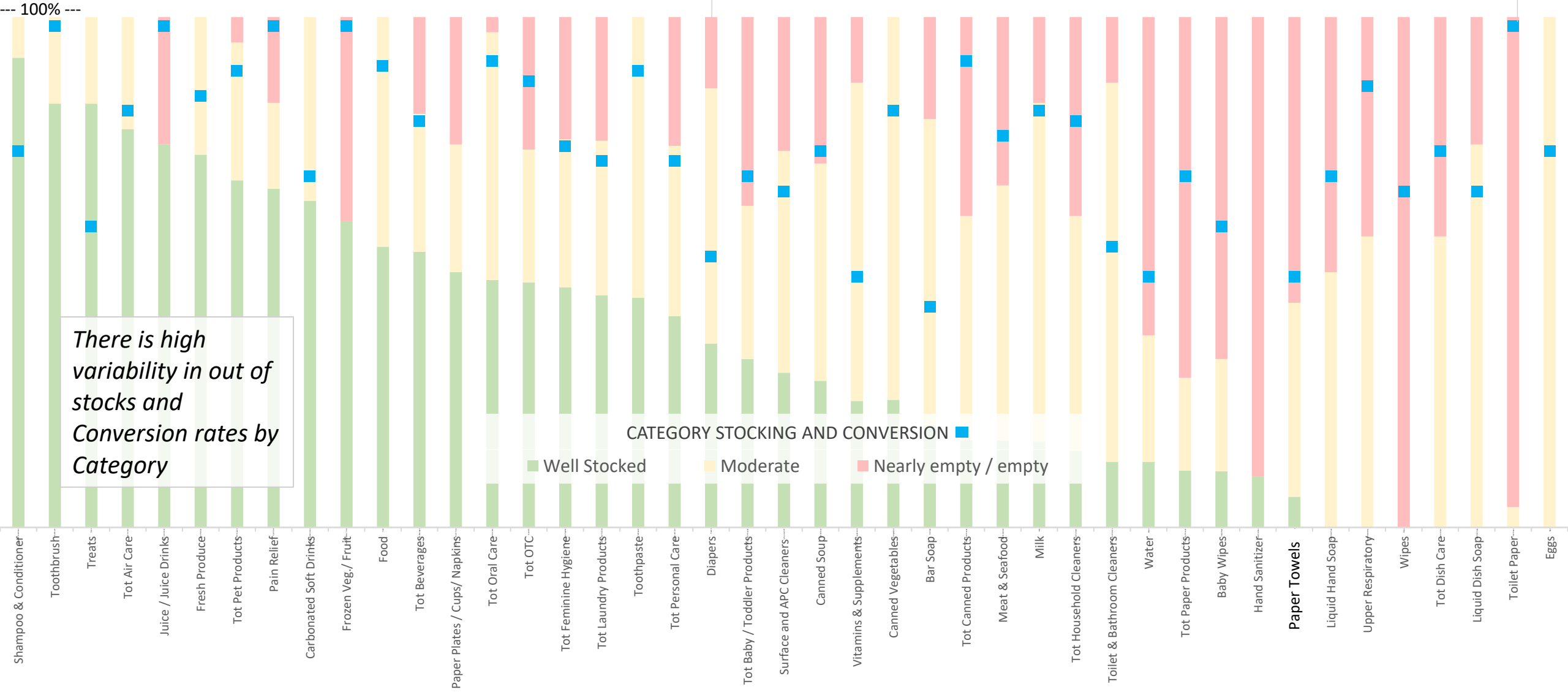
Consider posting signage to remind shoppers
of best practices as well as provide gloves,
bags, or other protective gear to limit touching



"It is very difficult to switch brands; I may have to go to another store"



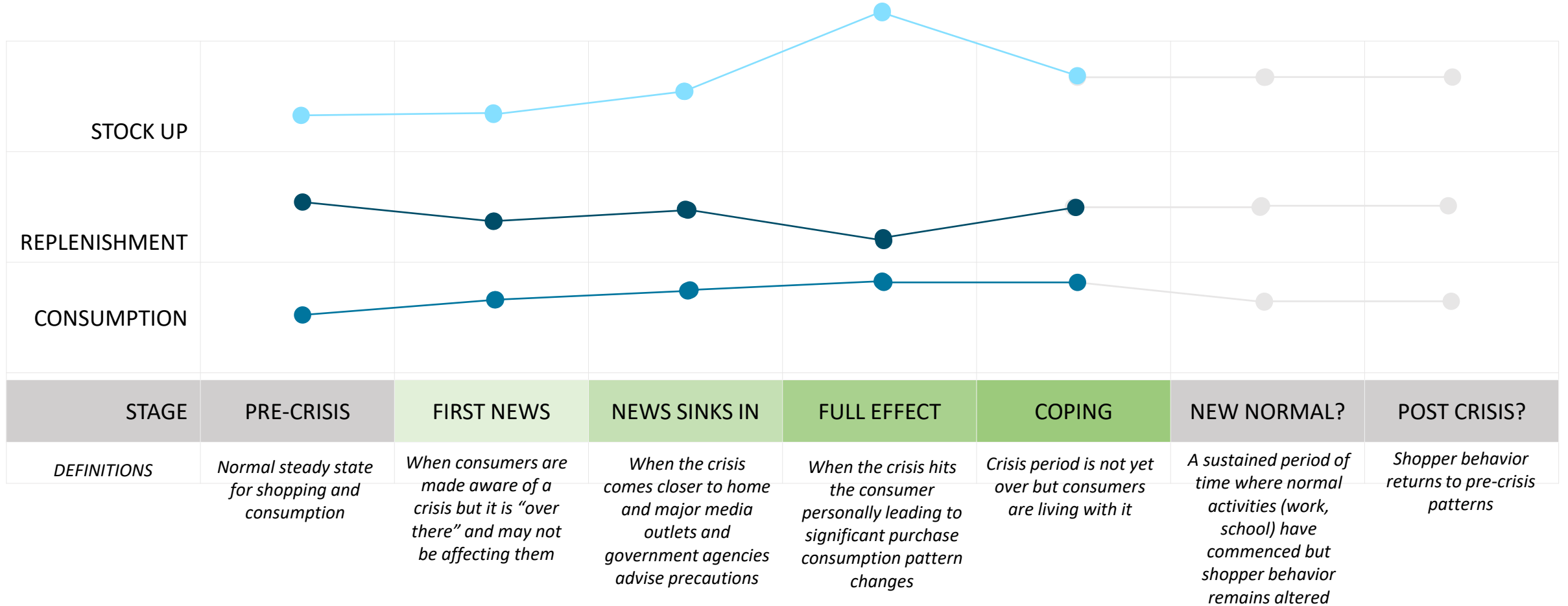
"I will take anything they have, but it is empty"





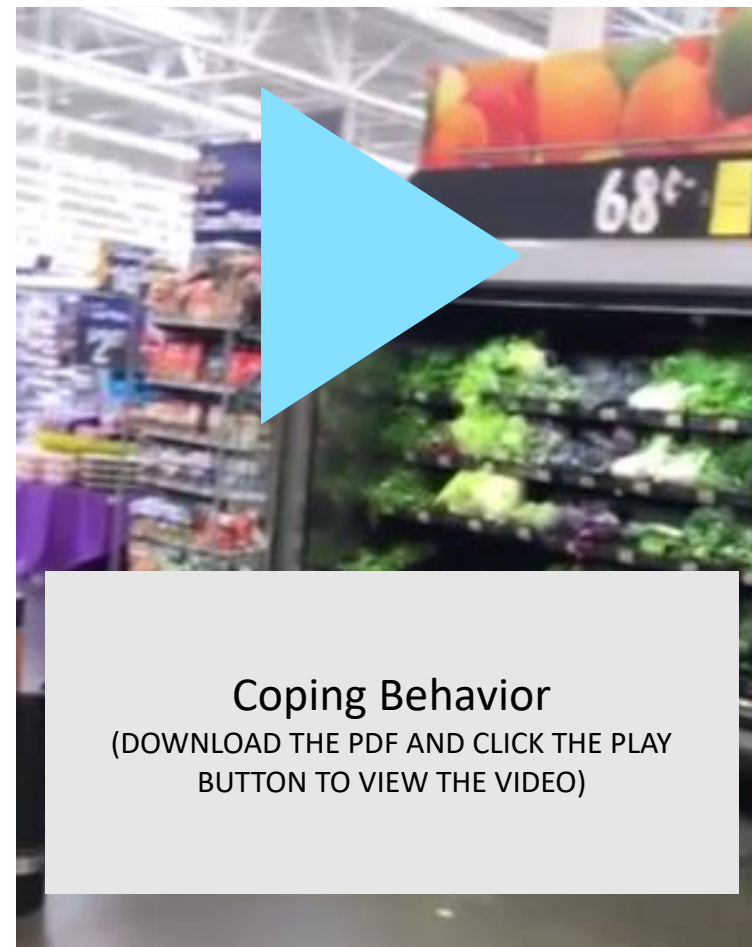
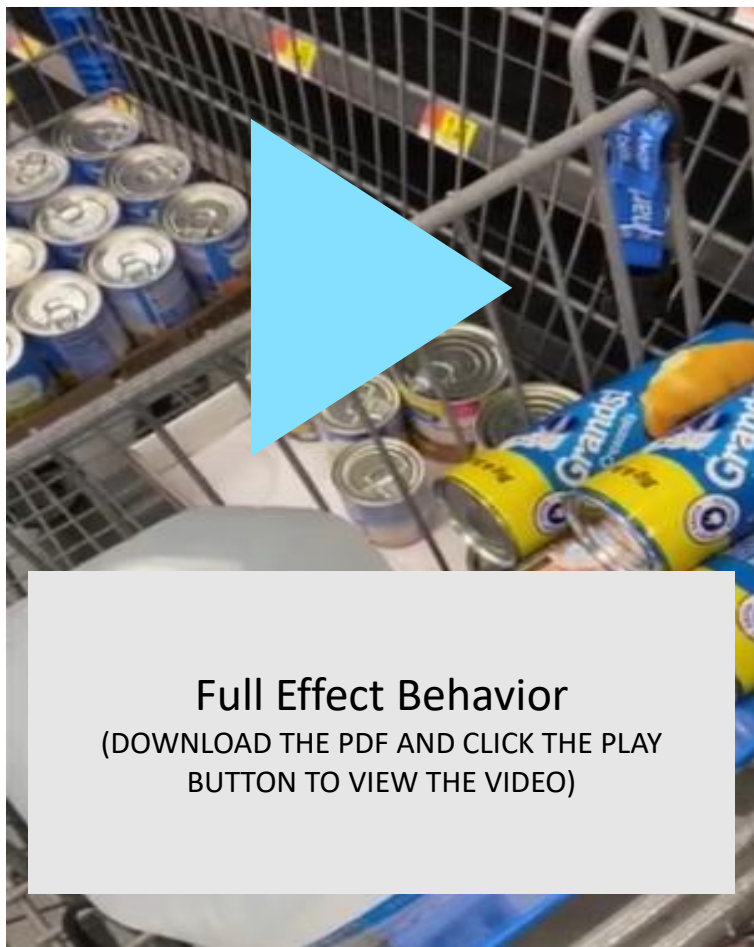
TIMELINE OF CRISIS SHOPPER BEHAVIOR

There appears to an evolving “stock-up state of mind”





TIMELINE OF CRISIS SHOPPER BEHAVIOR – VIDEO EXAMPLES





A GLIMPSE OF AT-HOME CRISIS CONSUMPTION BEHAVIOR...MORE TO COME NEXT WEEK



At-Home Stock Up Consumption
(DOWNLOAD THE PDF AND CLICK THE PLAY BUTTON TO
VIEW THE VIDEO)



- How & Where are people storing the products they have stocked up on?
- Are they stocking up on their typical brands or switching to other brands? Was that switch voluntary (i.e. because of price) or forced (because of out of stocks)?
- If they switched brands, do they like the new brand they're using? Or will they return to their typical brand once it is available?
- How are they planning to use/consume the products they have stocked up on? Are they using them differently now?



ABOUT NAILBITER



NAILBITER™ IS A GLOBAL QUANTITATIVE VIDEOMETRICS PLATFORM

CTO TO MOST PROMISING
Review CPG
TECH SOLUTION PROVIDER - 2018
"Top 10 CPG Tech Company"



Scales behavioral research with new metrics and Norms



Metrics proven at top global brands



Developed by CPG researchers and marketers



Recognized by industry and media as market leader





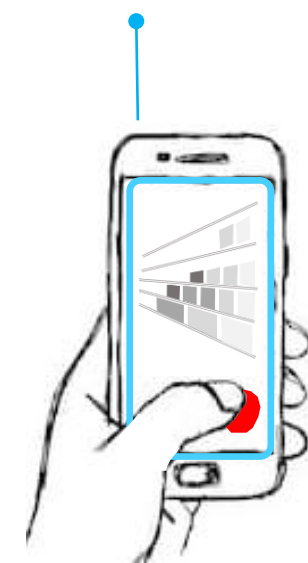
VIDEO IS USED TO OBSERVE HUMAN BEHAVIOR & YIELD VIDEOMETRICS



ANY COUNTRY
ANY CLASS OF TRADE
ANY RETAILER



REAL SHOPPERS
REAL SHOPPING TRIPS
NO MISSIONS



IN-STORE



E-COMMERCE

SMARTPHONE APP
LIGHT INSTRUCTIONS
SHORT VIDEOS OF REAL TRANSACTIONS