

Revealing Shopper Insights

Discovering Growth and Debunking Loyalty Myths

The quest for *next*
Find your next growth opportunity



Meet your speakers



Andrea Binder

Retail Account Lead, Pet Vertical
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Jim Presley

General Manager, US Consumer
NIQ



Shay Krafft

Business Planning & Strategy
Chewy



Mary Bloom

Market & Competitive Insights
Mars Pet Nutrition



Agenda

1

An Intro to NIQ's Omnishopper Panel

2

Understanding consumers in an Omni landscape

3

Maximize Existing Shopper Value

4

Leverage Insights for Incremental Growth

5

Navigate In Store and Online Dynamics

6

What's Next



*The largest consumer
panel*

Almost every shopper is an Omnishopper



91%

**of buyers buy both
in-store and online**

Black consumers
make up nearly 14% of
the population, and
**their purchasing
power is projected to
reach \$1.8T by 2025**

Gen Z will be the
largest and richest
generation ever – and
**their spend will grow
\$2.7 trillion over the
next few years**

Hispanic consumers
spent **\$277 billion** on
CPG over the past
year, growing at 4.8%,
**outpacing the
national growth rate
of 3.6%**

SOURCE: NielsenIQ Omnishopper, NielsenIQ Diverse Voices Report Series

US Omnishopper panels: massive monthly active user base enables strict sample selection

Selection balances increased sample, demographic representation, and data quality



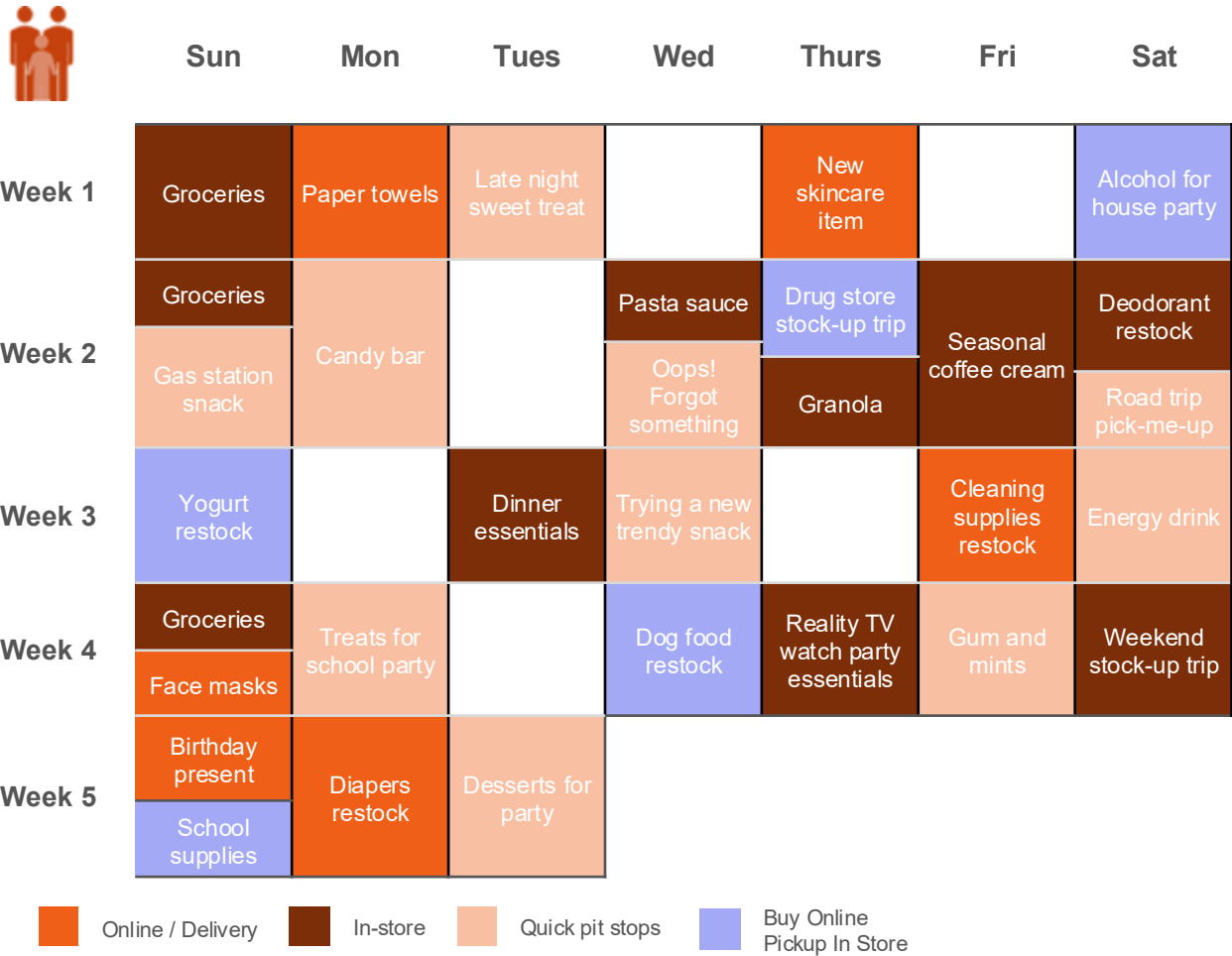
Capturing *40 trips per panelist* per month

Trustworthy precision

Strict panelist criteria ensures only the most engaged and active panelists are leveraged

Balanced omnichannel insights

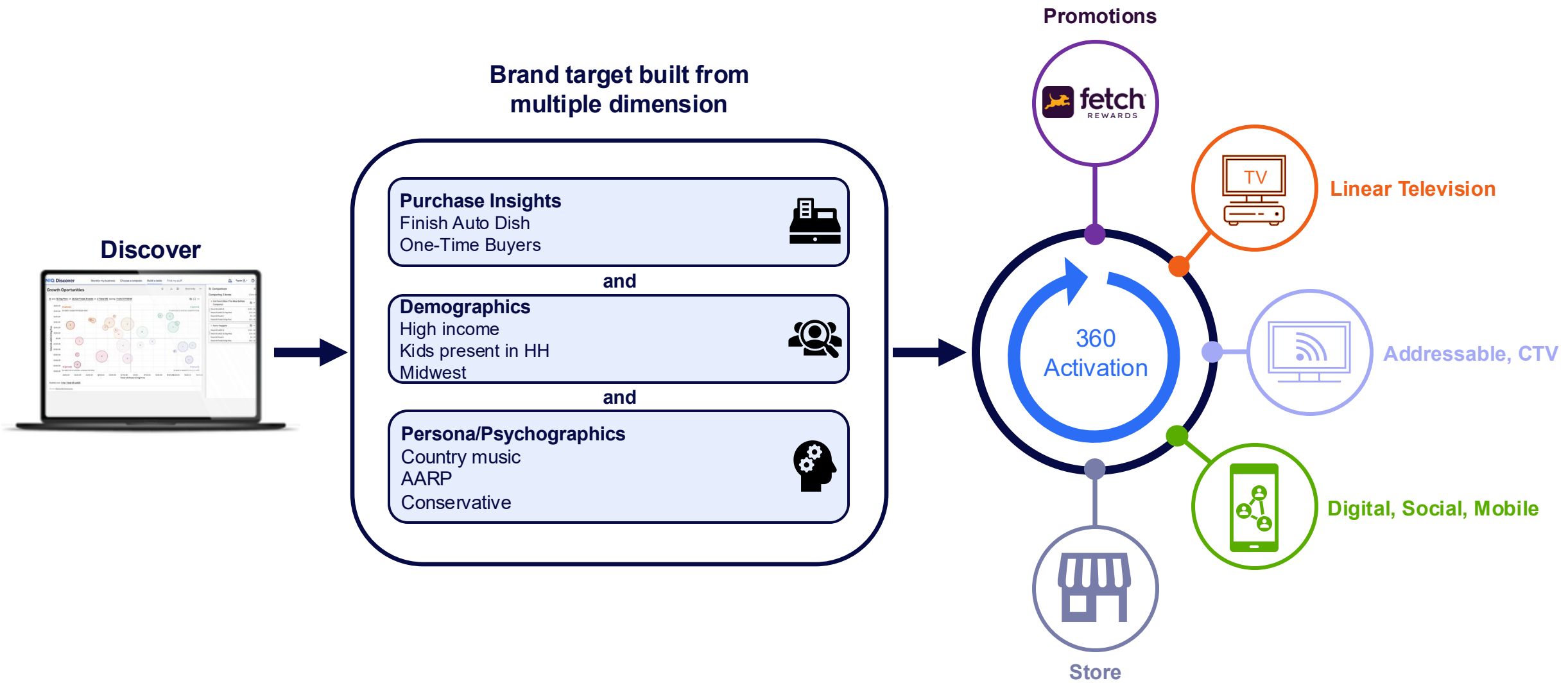
And 100% e-receipt coverage from all panelists ensures you capture every single trip



Unlocking a view into *5,000 more brands*



Connecting insights to activation to measurement, while driving overall marketing efficiency



Pet is the front runner of the Omni development



▶▶▶ **43%**
+10.7% vs YAG
Total US – Online
Online sales for
Pet Retailers
inclusive of Pureplay

57% ◀◀◀
-3.5% vs YAG
Total US – In Store
B&M sales
for Pet Retailers

Note – Intro Question to Shay and Mary both on this slide!



Maximize Existing Shopper Value

“Studies suggest that depending on the industry you are in, acquiring a new customer can cost five to seven times more than retaining an old one.”

- Forbes Business Council



Fuel Incremental Growth, Leveraging Disaggregated Data for Deeper Insights

Omnishopper has unlocked Mars Pet's ability to understand the full picture of consumer behavior as more and more pet parents shift their purchases online



Navigating In-Store vs. Online

Understanding how pet parents shop the category as it exists today and how that differs online vs instore



What's Next?



Empower sales and category teams with insights to drive incremental growth for both manufacturers and retailers



Continue leveraging full-view data to deepen understanding of consumer behavior and refine innovation strategy



Use NIQ's omnichannel tools to optimize category performance across both physical and digital shelves

Q&A



NielsenIQ

THANK YOU!!!



The quest for *next*

