A Cleaner View of the Omnishopper

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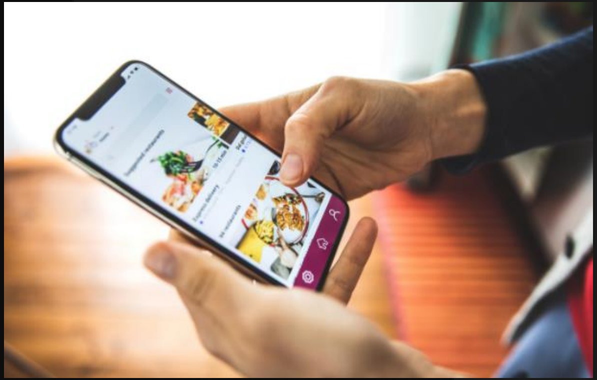
NielsenIQ

The consumer journey has shifted

66%

of consumers changed how they shop



81%

will continue to restructure spending in 2021

Source: NielsenIQ Unlocking Consumption global survey December 2020/January 2021. *Consumer

Game Changers: Polarizing trends within CPG

Perimeter	Routine	Insulated	Offline
▼	▼	▼	▼
Center of Store	Rerouted	Constrained	Online

4 consumer groups now shape variations in consumption patterns

Constrained Existing	Constrained New	Insulated Cautious	Insulated Unrestricted
15%	**31%**	**29%**	**25%**
Previously / still restricted spenders	Newly impacted spending due to COVID	Cautious / careful spending	Unrestricted, free/able to spend

60% Cost-conscious consumers
Altering their buying and consumption patterns

Source: NielsenIQ Homescan panel survey and segmentation Total U.S,.

CPG is still reporting record growth in Q1 2021

$ % Change		
	Total CPG:	+8%
	Household Care:	+8%
	Laundry Care:	+2%
	Paper & Plastics:	+3%

NielsenIQ Scantrack Total Tracked Sales xAOC – Dollar Growth 52 weeks to April 3/21 , 2020.

Answering your billion dollar questions

>$160B

Online CPG sales in 2020

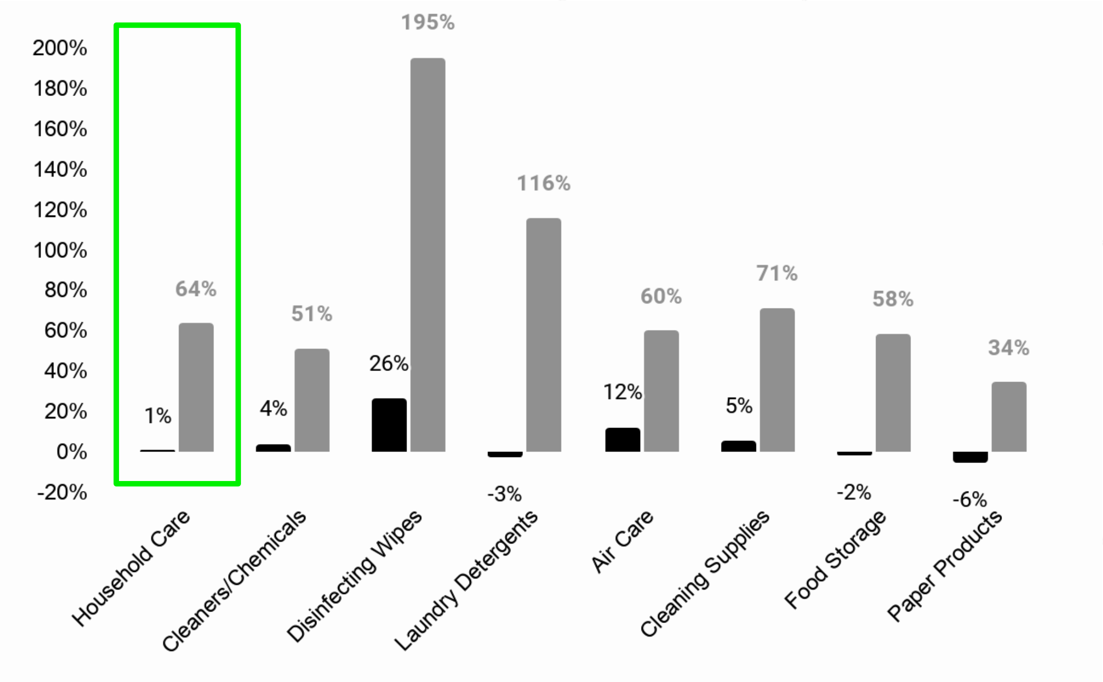
12.6% Share

+58% growth online

- 22 million new online shoppers
- 40% are now omnishoppers
- +43% more spending online

Household Care posts strong gains in ecommerce

Dollar % Growth vs LY Offline vs Online



30.3%
Of Shoppers purchase Household Care Online

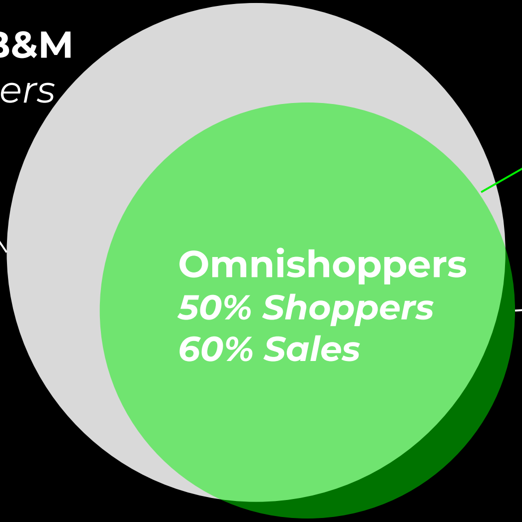
22.7%
Online dollar share for Household Care

Source: NielsenIQ Omnishopper Panel 13 WE 2/27/21 vs LY, Retail Universe contains 80%+ ACV of Household Care

Household Care has a strong omni-presence

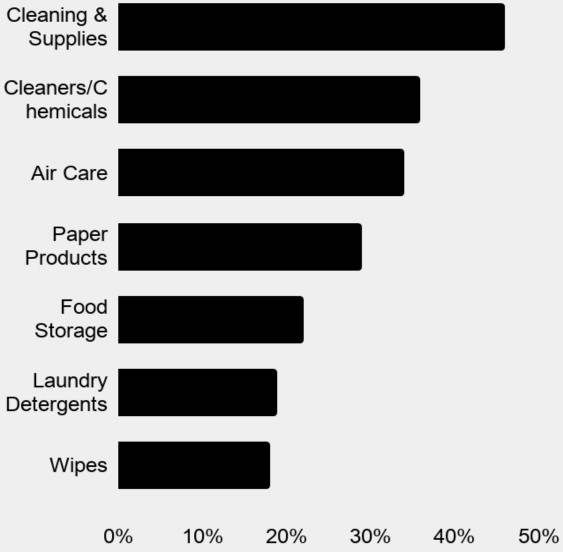
Exclusive B&M
48% Shoppers
39% Sales

Omnishoppers
spend 20% more



Exclusive Online
2% Shoppers
1% Sales

% of Shoppers which purchase both On and Offline



Source: NielsenIQ Omnishopper Panel 13 WE 2/27/21, Retail Universe contains 80%+ ACV of Household Care

Wealthier, Millennial, more educated shoppers buying Household Care online

Household Care Shoppers Online vs Brick and Mortar High $ Index Demographics

133
Income $100k+

133
College/Post-College Graduate

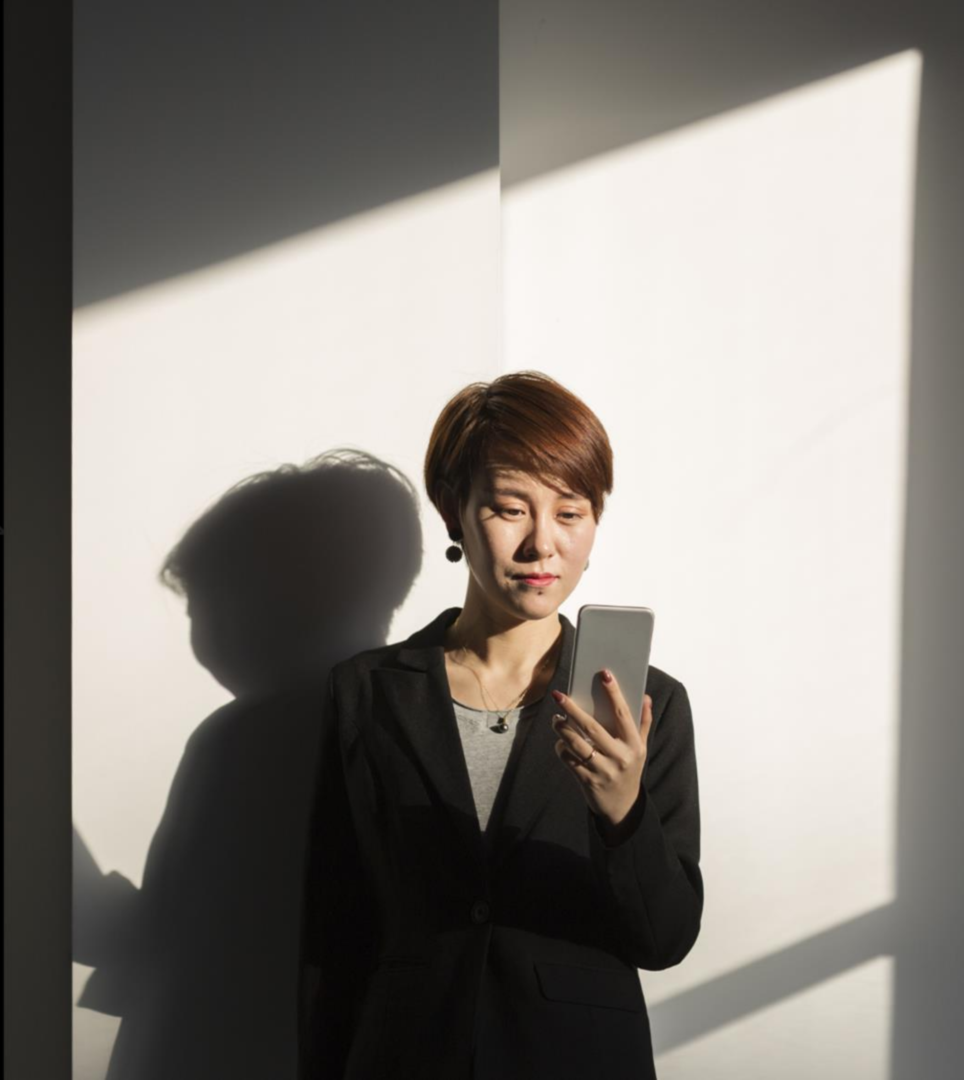
128
Asian

123
Age 30-34

123
Age 35-44

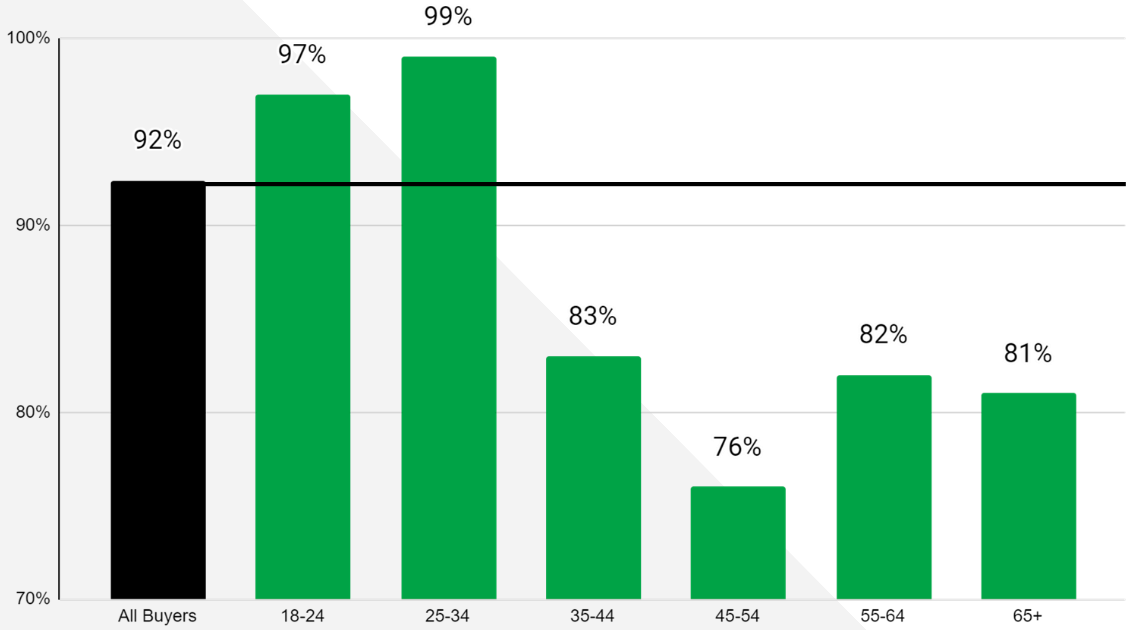
118
w/ Kids under 6 yrs

Source: NielsenIQ Omnishopper Panel 36 WE 2/27/21, Retail Universe contains 80%+ ACV of Household Care



All age ranges offer growth online

Percent online dollar growth by age



Source: NielsenIQ E-Commerce Measurement powered by Rakuten Intelligence; 12 months ending 2/28/21 vs YAGO – Grocery based categories

Opportunities for household cleaning brands

1: choice

The "newly constrained" consumer is looking for choices when it comes to less expensive items. Challenger brands can get into the consideration set, especially through eCommerce.

2: availability

Supply was disrupted which offered challenger brands the opportunity to show up at the shelf. Retailers need to reset decisions based on the omnishopper. Understanding incrementality and impact to aisle and store is critical.

3: convenience

Consumers have been living a “new reality” for a year and have coped with a lot of change. They have finally built new muscle memory around pandemic shopping habits. As 2021 brings new change, find ways to show up for them (e.g. subscriptions, reminders, membership).

4: personalization

Personalizing products, pricing, messaging and engagement with unique consumer cohorts will increase your chances of developing long term loyalty.

Thank you.

Carman Allison