Behavior change in times of instability

26 April 2022

#BehaviorChange – sources used

Shopper view

Consumer Panel + Why2Buy

- Registered purchases
- Motivations and lifestyle needs
- *14 countries, 174 million households*

AT, BE, CZ, DE, DK, HR, HU, IT, NL, PL, RS, RU, SE, SK

Behavior Change survey

- March/April
- *15 countries, 7,855 main shoppers*

AT, BE, BG, CZ, DE, DK, HR, HU, IT, NL, PL, RS, RO, SE, SK

Business view

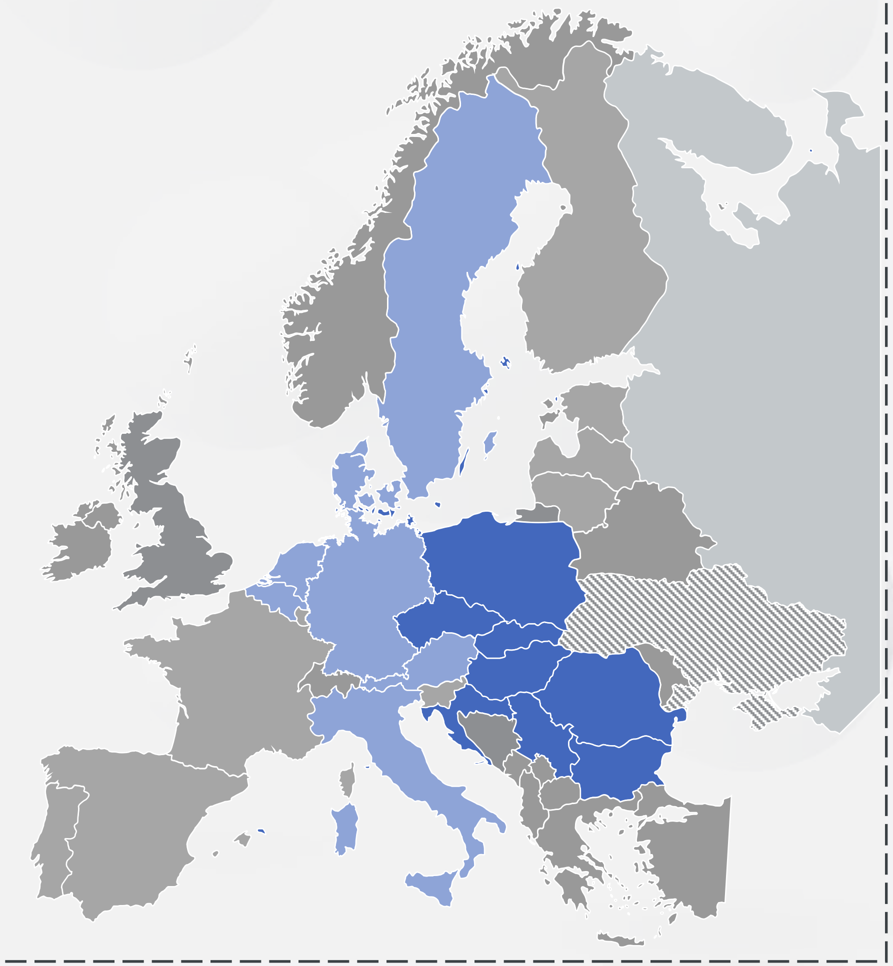
Behavior Change survey

- March/April
- *260 manufacturers & retailers*

AT, BE, BG, CZ, DE, DK, HR, IT, NL, PL, RS, RO, SE, SK

WSE
Austria
Belgium
Denmark
Germany
Italy
Netherlands
Sweden

CEE
Bulgaria
Croatia
Czech Republic
Hungary
Poland
Romania
Serbia
Slovakia



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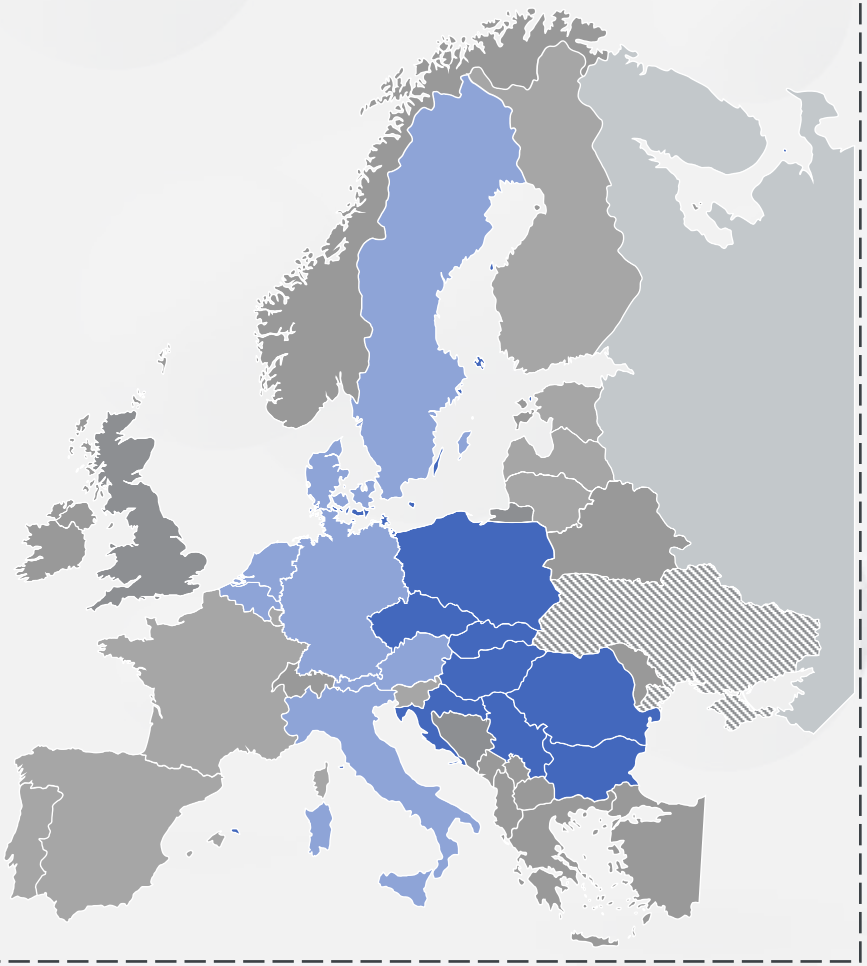
WSE
Austria
Belgium
Denmark
Germany
Italy
Netherlands
Sweden

CEE
Bulgaria
Croatia
Czech Republic
Hungary
Poland
Romania
Serbia
Slovakia



Agenda

BEHAVIOR CHANGE IN TIMES OF INSTABILITY

1 – Choice drivers
- UA war
- COVID-19
- Inflation

2 – Behavior change
- Basket
- Channel

3 – Trend impact

4 – Segments to watch
- Crisis types
- Eco types

5 – Retail view
- Store choice
- Industry take
- E-grocery

6 – Coping strategies

1. CHOICE DRIVERS

1 – Choice drivers
- UA war
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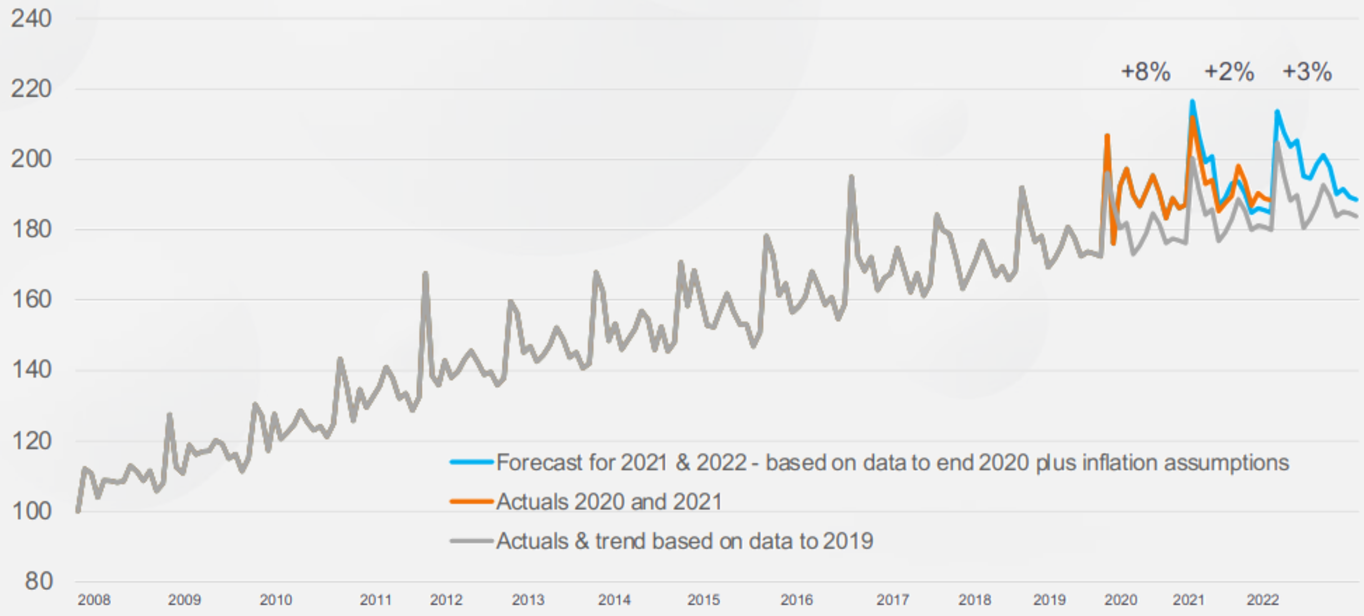
6 – Coping strategies

FMCG value in 2022 will be at least 13% higher than 2019

1. CHOICE DRIVERS

Global FMCG value index monthly trends and forecast



- FMCG value will end up +13% above 2019 levels
- Forecast adjusted from flat to +3% due to inflationary pressure
- Other factors of influence:
  - Work from home: 24% will work from home at least 1 day per week
  - In home / Out—of-Home ratio
  - Down / uptrading

Source: Europanel FMCG Barometer – France, Germany, Italy, NL, Spain, UK, Poland, Russia, USA (IRI), Brazil, Mexico, China, India, Japan (Intage); GfK, Behavior Change survey EU-15

Raw material costs and supply chain disruptions drive up costs

1. CHOICE DRIVERS

Prices/growth rates April 2022 vs April 2021

Crude Oil	Lithium	Gas	Shipping costs
+65%	+452%	+151%	+218%

Wheat	Oat	Palm Oil	Canola
+66%	+109%	+57%	+43%

Source: https://tradingeconomics.com/commodities | Shipping costs: https://fbx.freightos.com, https://www.freightos.com/freight-resources/coronavirus-updates/

General future outlook still optimistic

Amidst intense worries about the Ukraine war

1. CHOICE DRIVERS

Mood about the future (Pessimistic; Neutral; Optimistic)

BE
CZ
SK

RO
DK
BG

	Pessimistic	Neutral	Optimistic
Consumers	29	29	41
Business	19	35	46

Worry about Ukraine war (% (really) worried)

Consumers	EU-15 68%	CEE 72%	WSE 65%
Business	Business 88%	Manufacturers 88%	Retailers 85%

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; Behavior Change Business survey, n=260

Business expectations

After COVID-led growth, downturn due to Ukraine war

COVID-19 impact

Impact so far		Expectation
28%	sharp growth	3%
34%	slight growth	36%
10%	stable	32%
21%	slight decline	28%
7%	sharp decline	2%

Ukraine impact

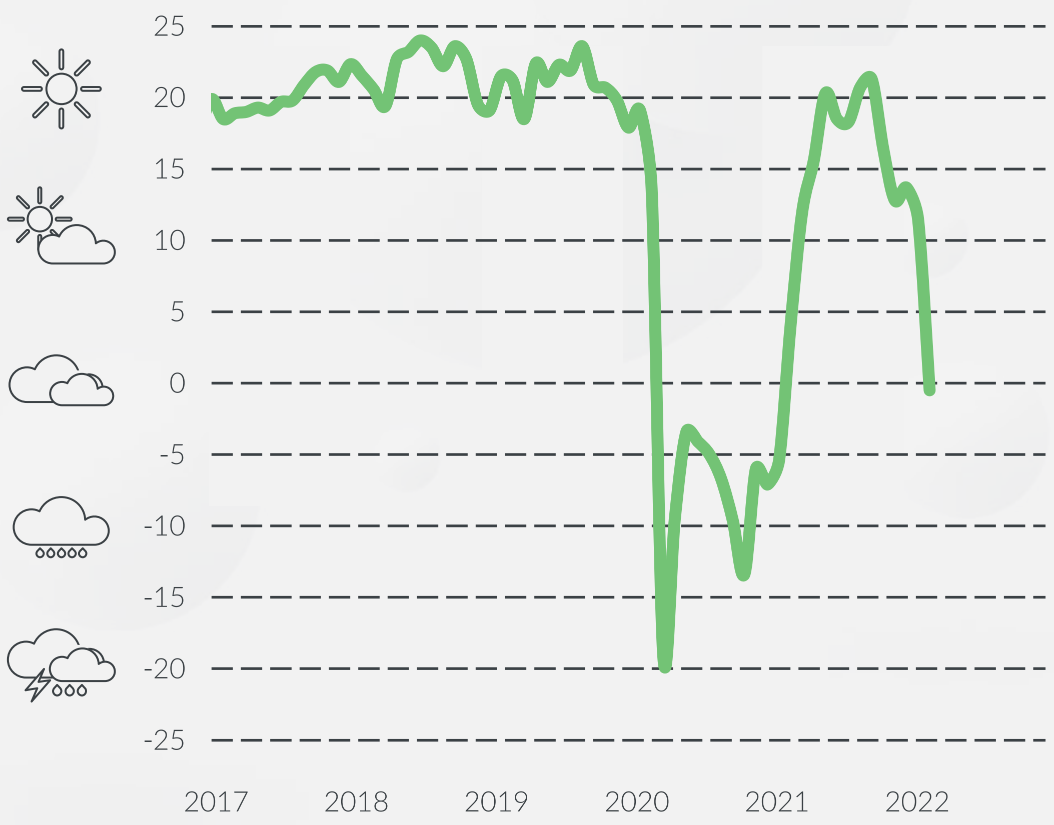
Impact so far		Expectation
1%	sharp growth	0%
11%	slight growth	7%
46%	stable	24%
36%	slight decline	56%
7%	sharp decline	13%

Source: GfK, Behavior Change Business survey, n=260

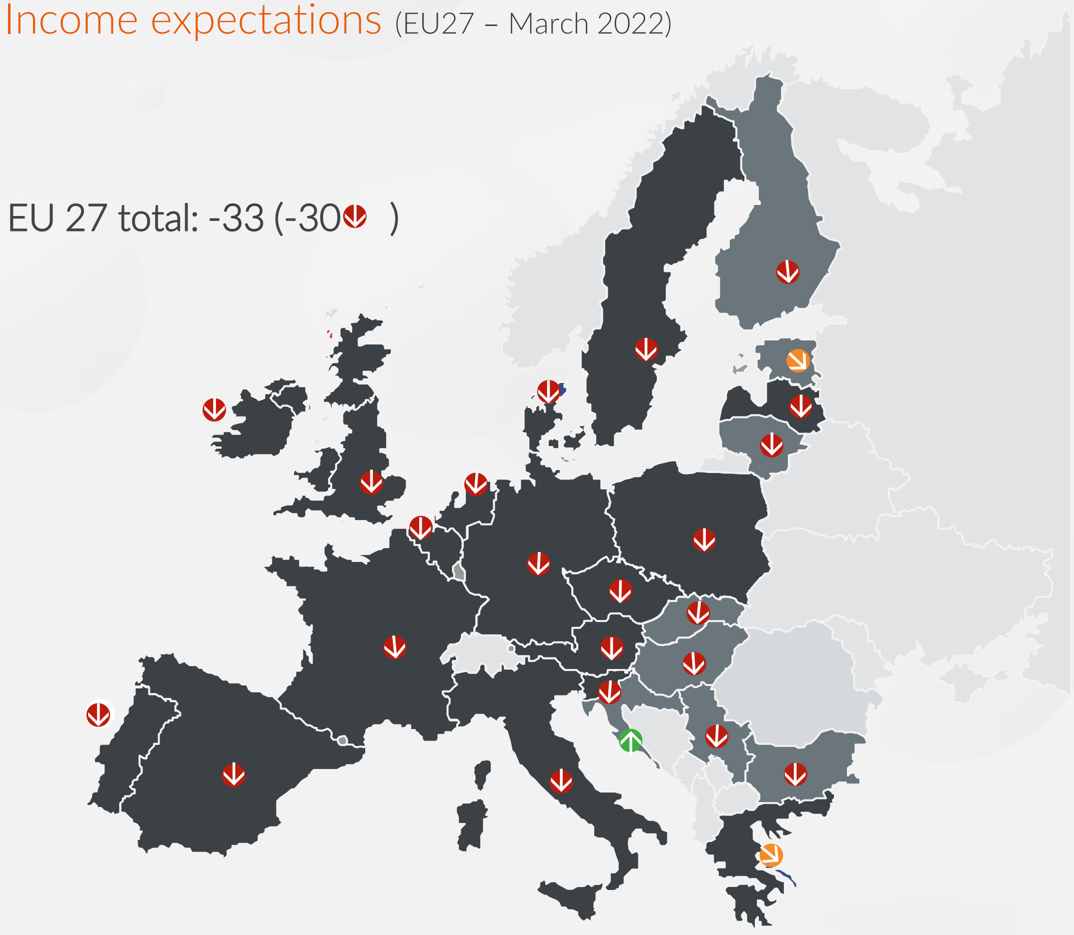
Consumer climate is plunging

1. CHOICE DRIVERS

GfK consumer climate Europe (EU27 – March 2022)



Income expectations (EU27 – March 2022)

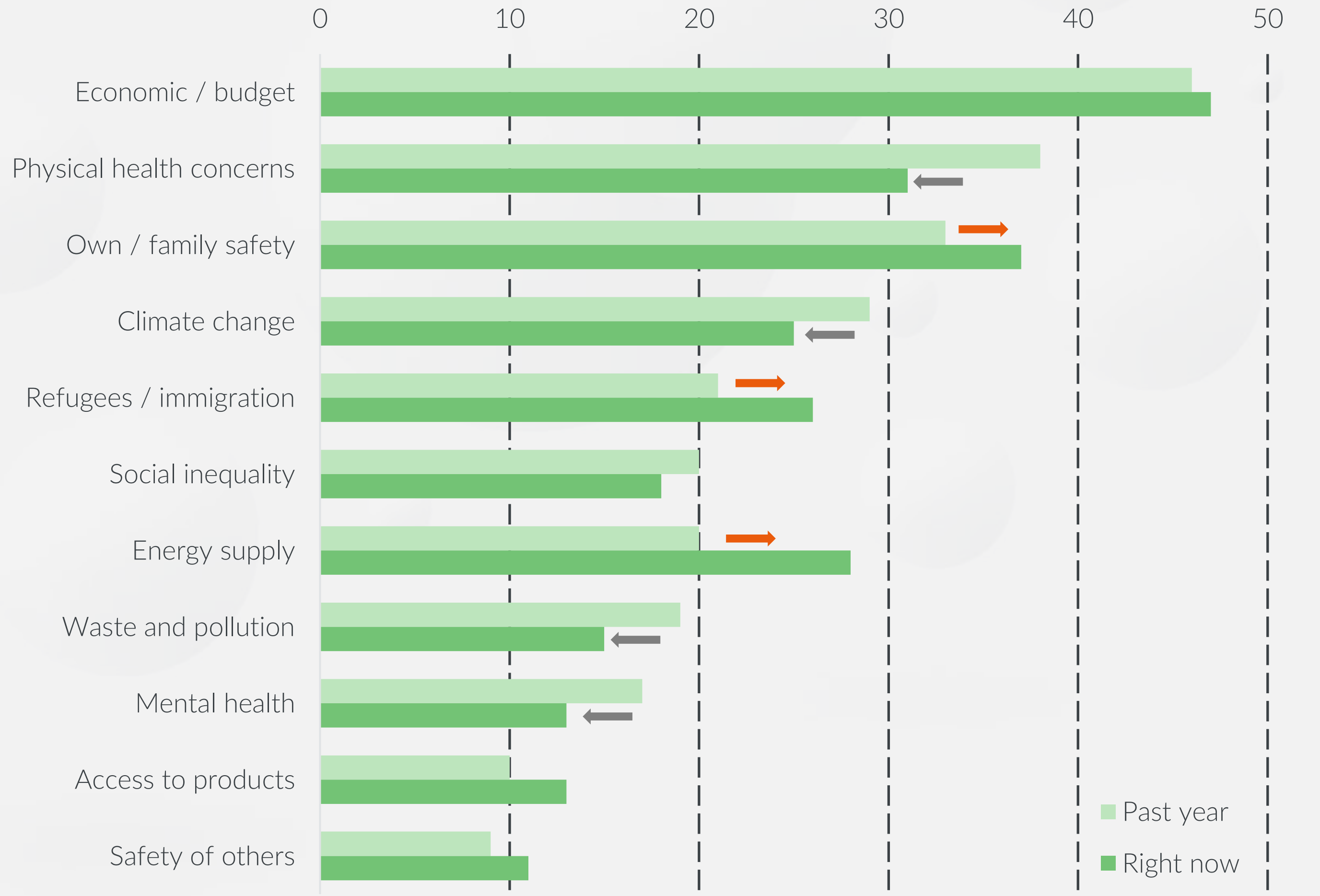


Source: GfK, survey on behalf of EU-Commission | March 2022 | values rounded

Major concerns are shifting

Budget, safety and energy vs health and sustainability

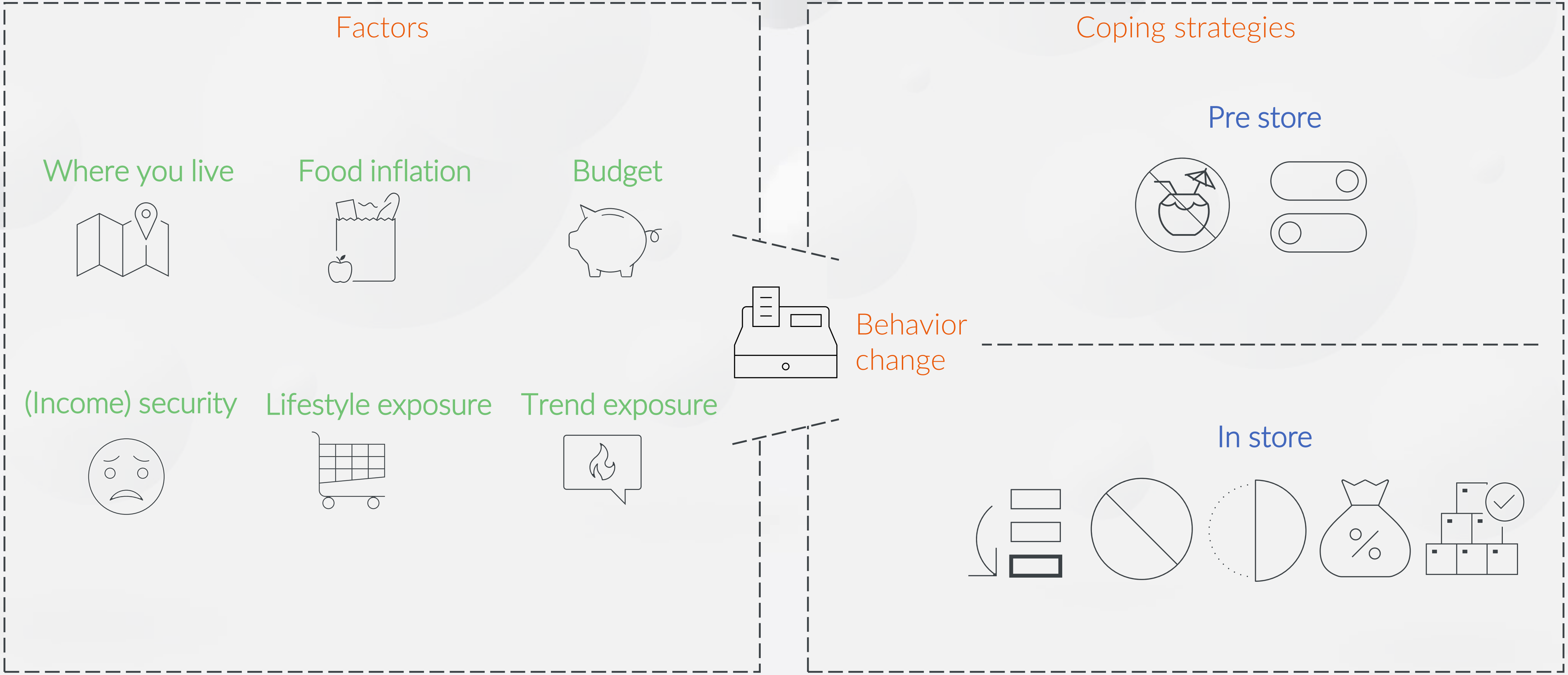
1. CHOICE DRIVERS



- Bulgaria, Croatia, Serbia
- Italy, Germany, Denmark
- Romania, Serbia, Poland

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022

1. CHOICE DRIVERS



Where you live

1. CHOICE DRIVERS

7.4% inflation

Euro-area average inflation in March

Exposure levels vary due to socioeconomic differences

'Budget' among top concerns:

57% Of CEE shoppers

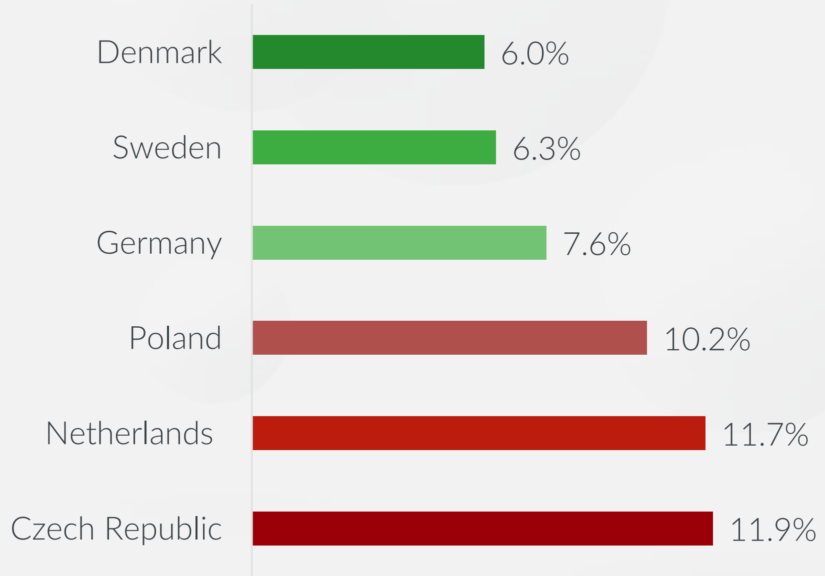
35% Of WSE shoppers

'Will control household spend more':

53% Of shoppers in Italy

33% Of shoppers in Sweden

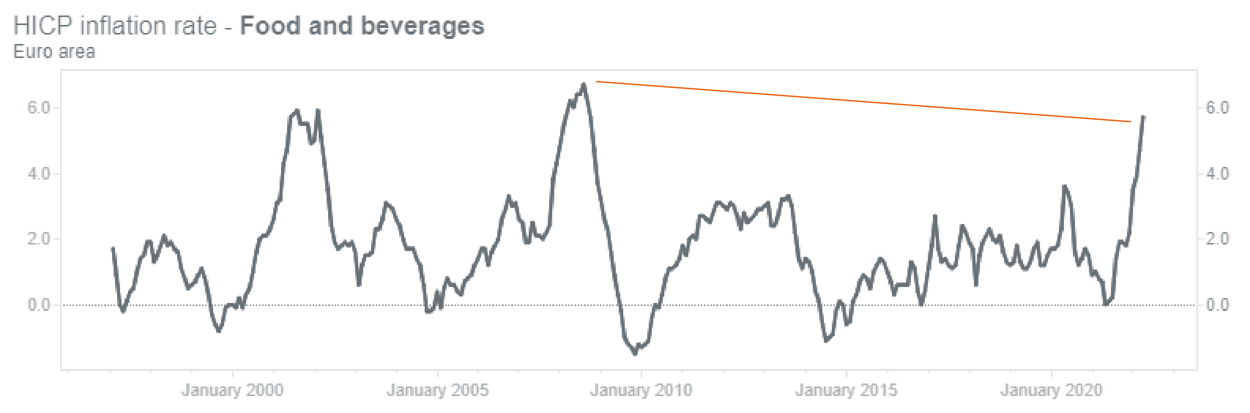
Inflation by country | March 2022



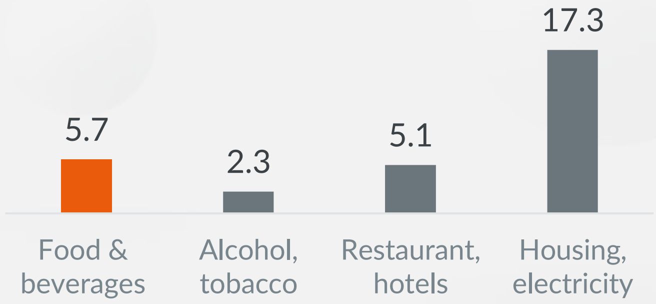
Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; https://www.ecb.europa.eu/stats/macroeconomic_and_sectoral/hicp/html/index.en.html

Food inflation

EU food price inflation | March 2022



- Food inflation has been higher before
- However, in 2008 total inflation was much lower
- Consumers wallets will be squeezed in other areas
- Though savings rates are much higher
- Some governments are reducing VAT on staple foods for affordability



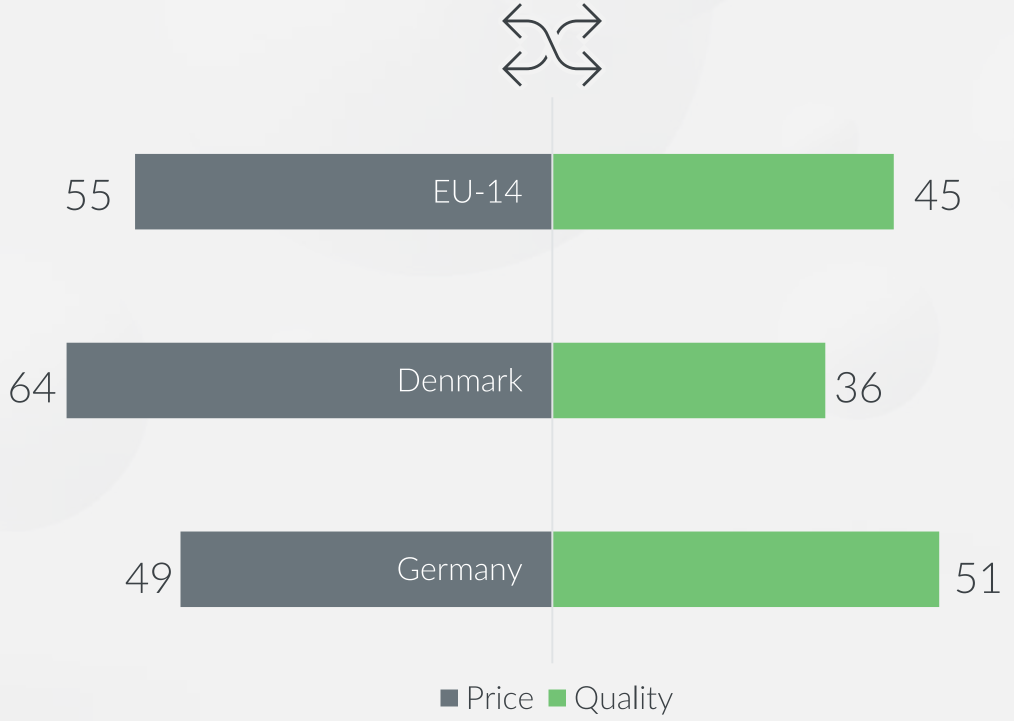
https://www.ecb.europa.eu/stats/macroeconomic_and_sectoral/hicp/html/index.en.html

Where you live

1. CHOICE DRIVERS

Price vs quality orientation

Slightly more price-oriented shoppers



Buying behavior effects | drinks

Price oriented shopper pay ~10% less

EU-14, average price paid (€/L)

-8%
▲DE, NL

-9%
▲SK

-11%
▲AT

DE, private label share, soft drinks

12%
Quality shopper

20%
Price shopper

Source: GfK ConsumerPanel, Harmonized Statements, EU-14 MAT ‘21

Where you live

DENMARK | FMCG total (Jan-Feb 2022 vs Jan-Feb 2021)

GfK inflation tracker

Change in prices paid
+4,9%

Inflation	Trading-Up/Down total
+10,3%	-5,4%

The change in prices in a category is the result of changes in the assortment purchased by buyers. This may be due to:

a) changes of purchased products within the existing, fixed assortment (change in demand, buyers' preferences)

b) introduction of new products (novelty).

GERMANY | FMCG total (Feb 2022 vs Jan 2022)

Change in prices paid
+2,4%

Inflation	Trading-Up/Down total
+2,9%	-0,5%

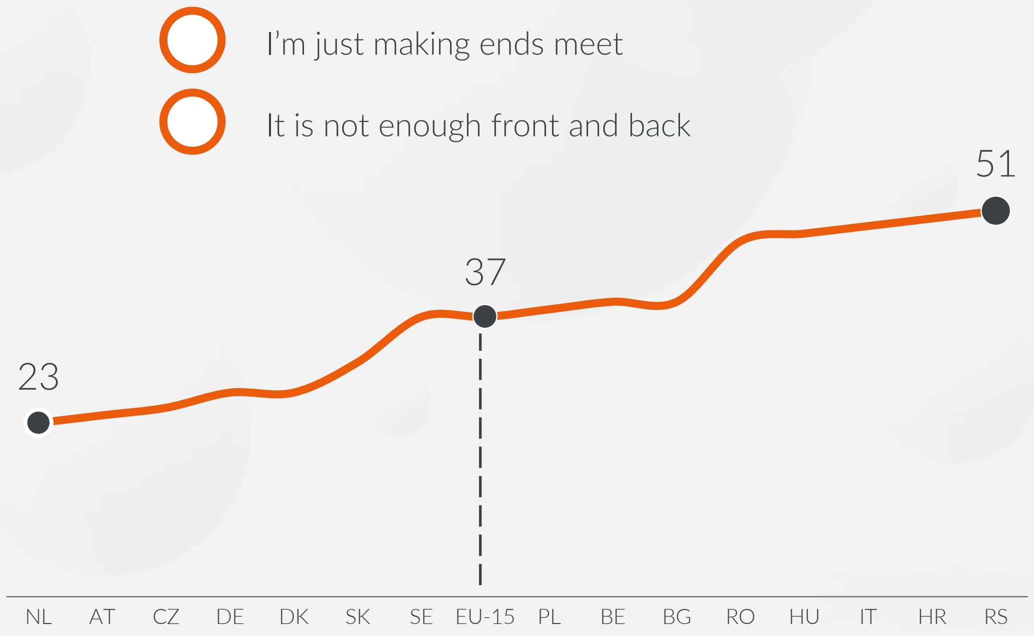
February kickstarts downtrading in both price and quality-oriented countries. In Germany, though it usually is a month with uptrading.

Source: GfK Inflation Tracker | March 2022 ConsumerPanel DK, DE

Budget Security

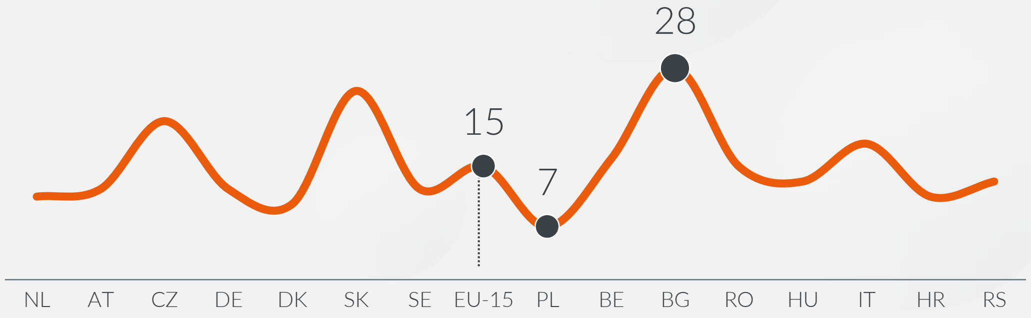
1. CHOICE DRIVERS

% struggling



1 in 3 Europeans are struggling financially

% employment at risk



15% is currently worried their job is at risk

Budget Security

1. CHOICE DRIVERS

	Total	CEE	WSE
Concerned	43%	48%	37%
Affected	18%	19%	17%
Resistant	39%	33%	46%

Struggling financially
Slight worry about job or not working

Highly afraid of losing job or currently unemployed

Financially comfortable
Not, only slightly worried about job or not working

Lifestyle exposure

1. CHOICE DRIVERS

The resistant spend on average +7% more on FMCG than the affected. This gap is most pronounced in the Netherlands (+24%) and Austria (+19%).

Coffee | Austria

86% of the resistant buy coffee
70% of the affected buy coffee

Value share in the category:
The affected at index 82 (below fair share)

Fabric conditioner | Netherlands

38% of the resistant buy fabric conditioner
45% of the affected buy fabric conditioner

Value share in the category:
The affected at index 138 (above fair share)

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; GfK ConsumerPanel, Harmonized Statements, EU-14 MAT '21

Trend exposure

1. CHOICE DRIVERS

Climate change, not health, a top 3 concern for the resistant

	Economic & budget	Physical health	Climate change
Affected	56% #1 ● 0%	30% #3 ▼5%	20% #6 ▼4%
Concerned	56% #1 ▲1%	34% #3 ▼7%	21% #6 ▼5%
Resistant	32% #2 ▲2%	28% #6 ▼9%	30% #3 ▼6%

Source: GfK, GfK, Behavior Change survey EU-15 n=7,855 April 2022

2. BEHAVIOR CHANGE

- UA war
- COVID-19
- Inflation

- Basket
- Channel

- Crisis types
- Eco types

- Store choice
- Industry take
- E-grocery

1 Choice drivers

2 Behavior change

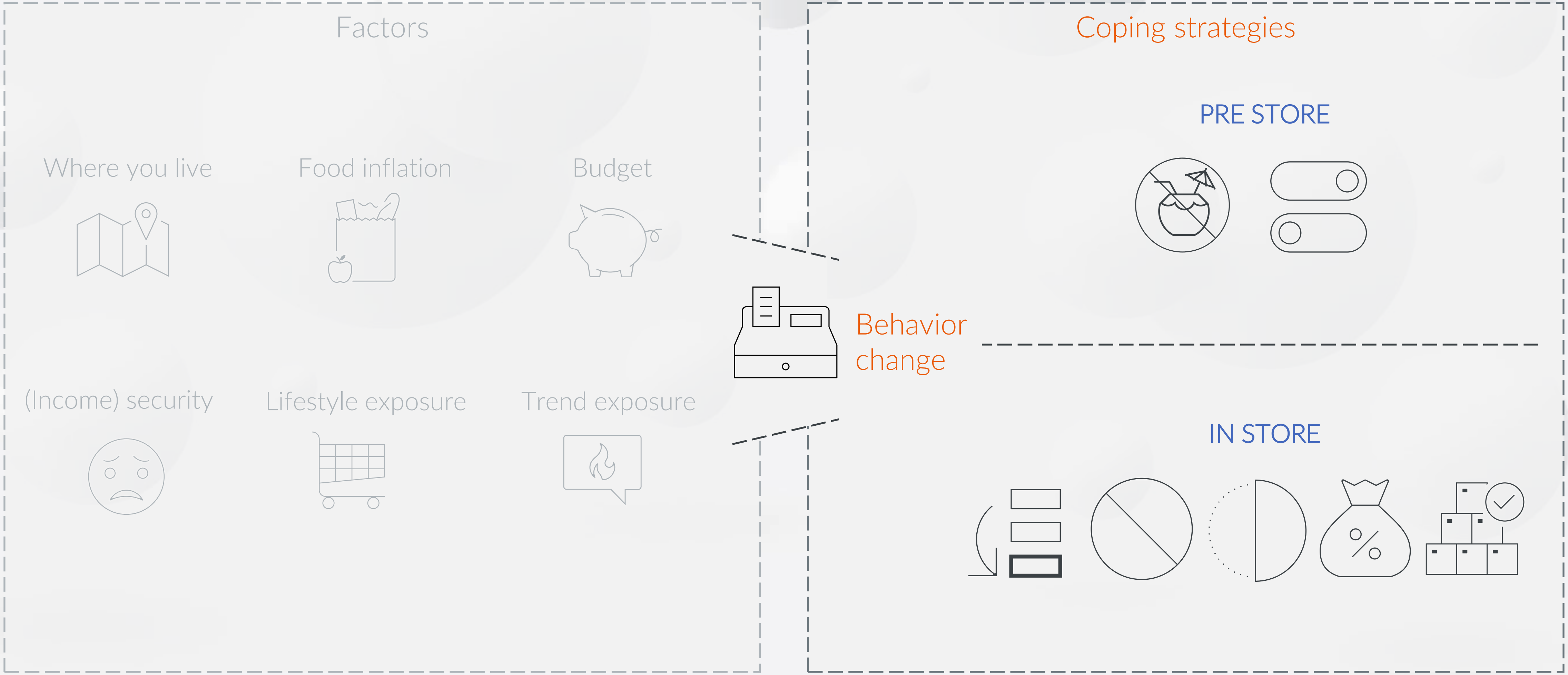
3 Trend impact

4 Segments to watch

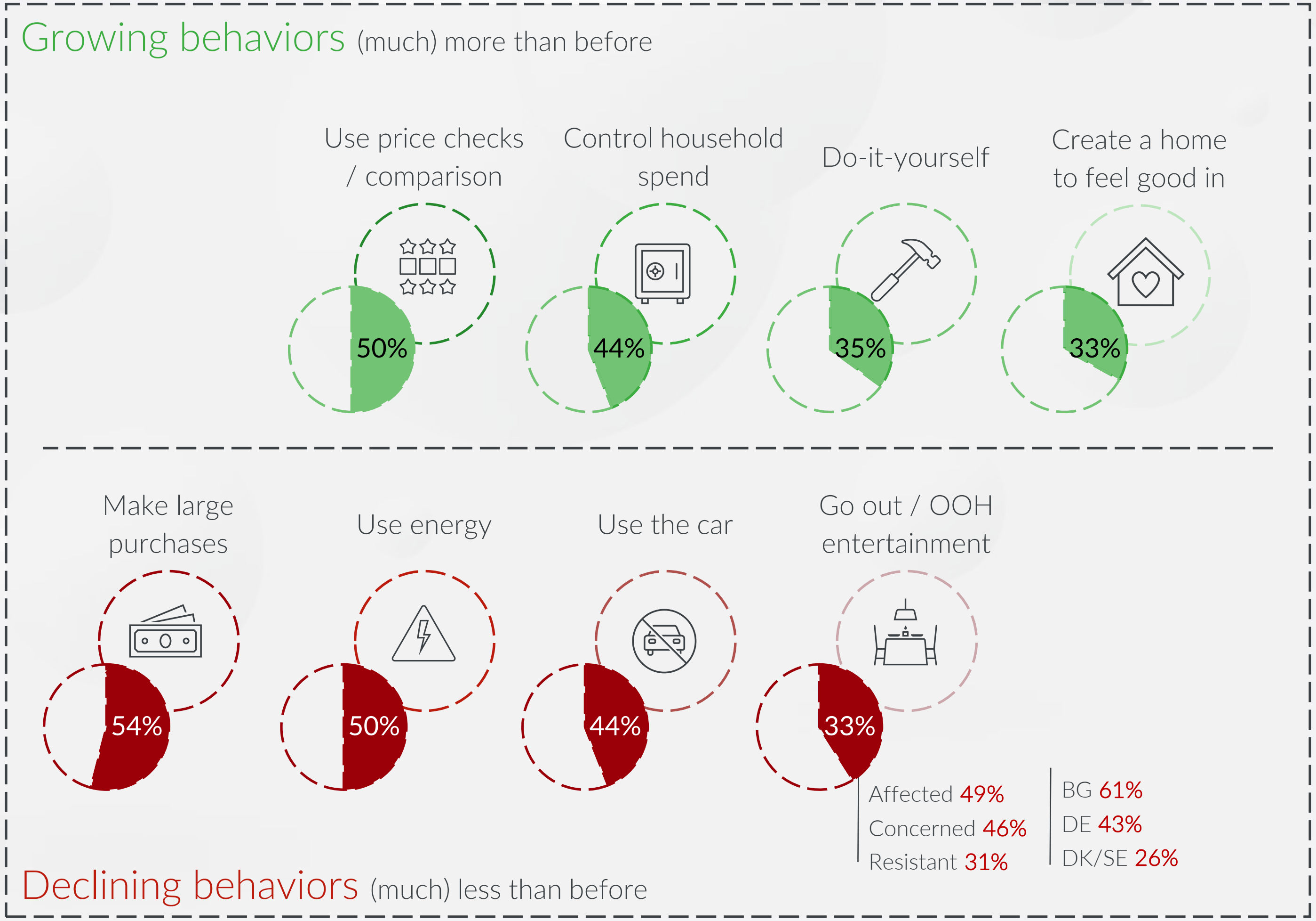
5 Retail view

6 Coping strategies

2. BEHAVIOR CHANGE



Changing consumer behaviors

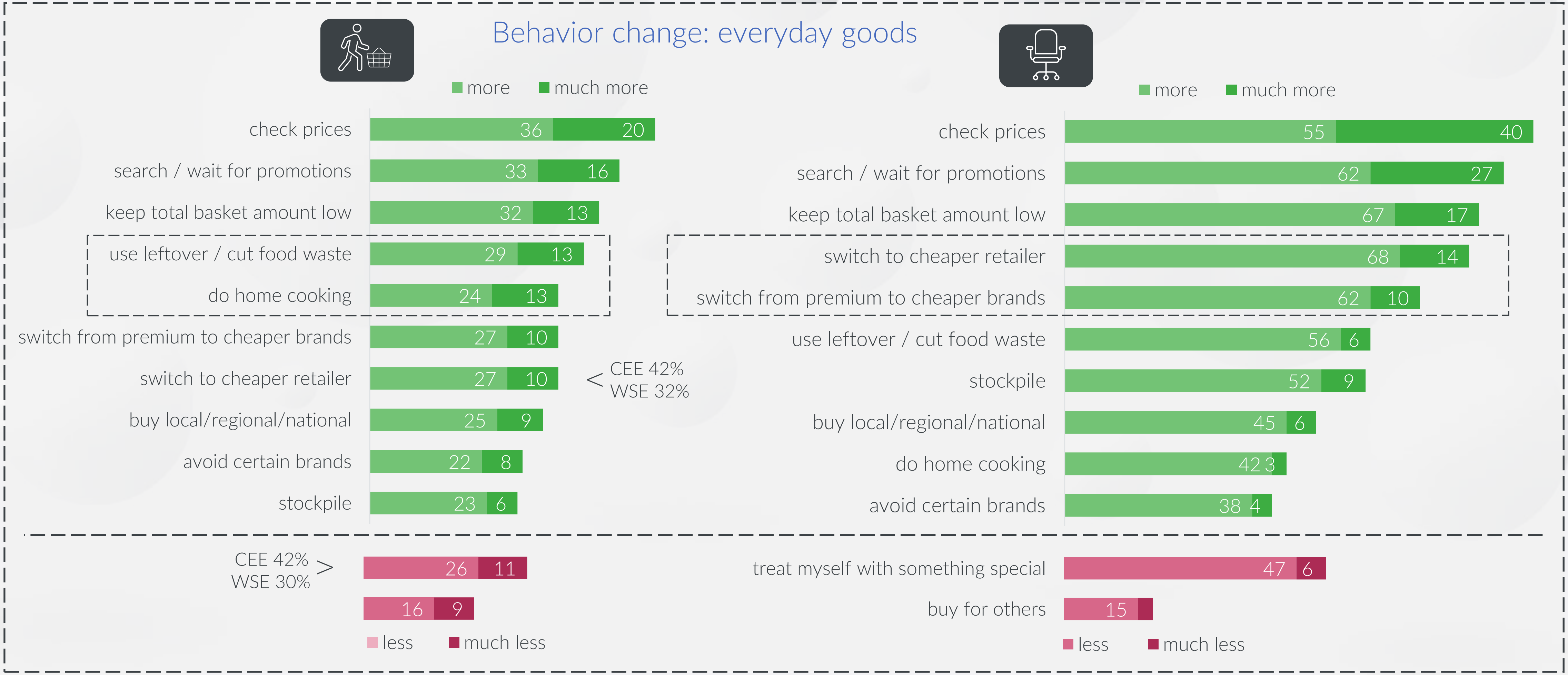


New frugality and continued homing in

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022

Conscious purchasing and food prep

Switching retailers less prominent among shoppers



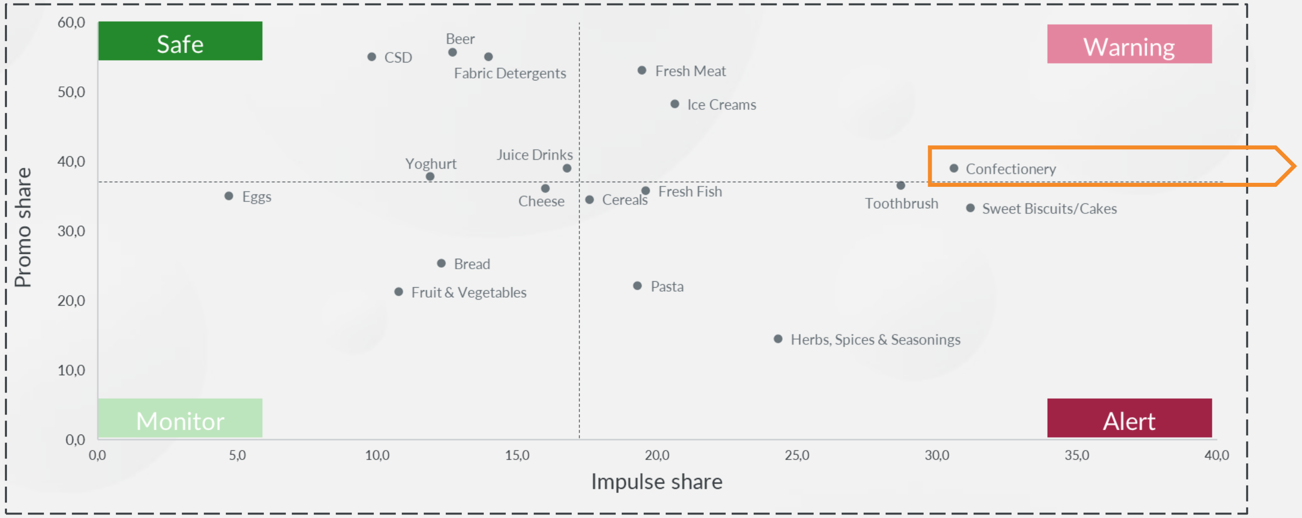
Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; Behavior Change Business survey, n=260 April 2022

High impulse, low promotion at risk

Premiumization driven by the resistant

2. BEHAVIOR CHANGE.

DENMARK | impulse x promotion matrix



DENMARK | Chocolate

The resistant usually buy more premium assortment in regular supermarkets

Price gap (€/KG) SPM –> HD

- Affected: €2,08
- Concerned: €2,20
- Resistant: €3,46

Coping strategies affect indulgence categories

GfK CPS | YouGov

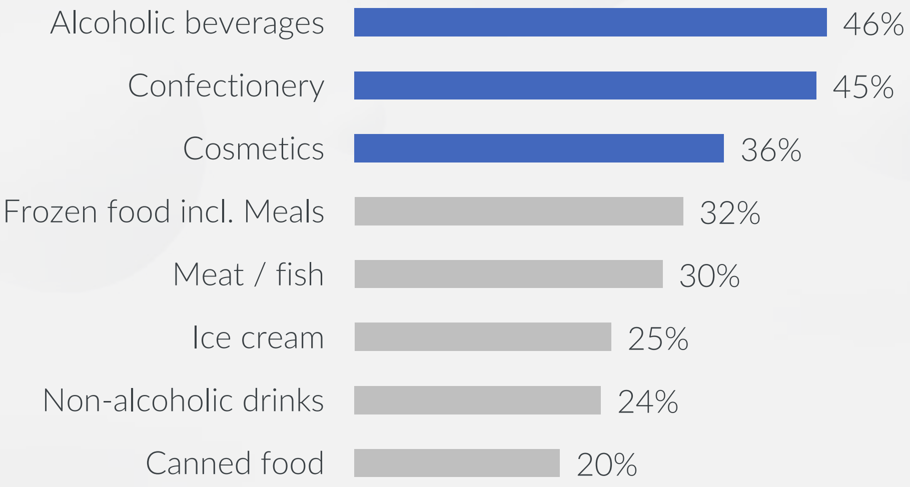
2. BEHAVIOR CHANGE

Behavior change & top categories

In which category will you adjust your purchases?

51%
FMCG

"Yes, I am **currently worried** that prices will rise, and I think this **will affect** my shopping behavior"



Relatively important

CEE
(Alcoholic) beverages
Cosmetics
Indulgence
Canned & frozen

WSE
Fresh foods
Staple foods
Toiletries

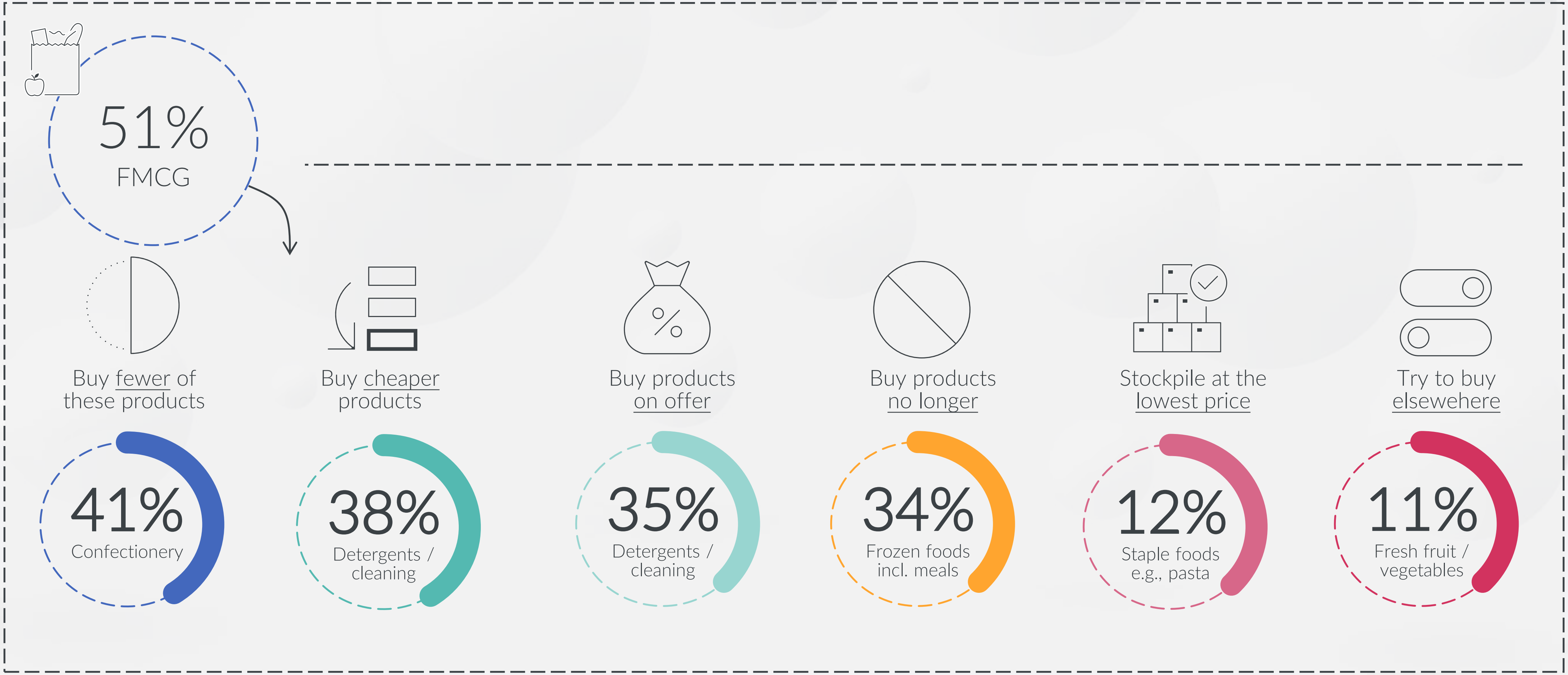
Affected
Fresh foods
Staple foods
(Non alcoholic) drinks
Home care

Concerned
Alcoholic beverages
Indulgence
Meat
Cosmetics

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022

Coping strategies differ per category

Buying less is most prominent in confectionery



Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022

3. TREND IMPACT

- UA war
- COVID-19
- Inflation

- Basket
- Channel

- Eco types
- Crisis types

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Health, price and proximity

Increasing choice drivers

3. TREND IMPACT

Shoppers and the industry **coincide** on the importance of **healthy, natural, local.**

Waste reduction, quality and **country of origin** are **underestimated** by FMCG companies.

The influence of **price, eco-packaging** and **convenience** is **overestimated.**

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022. "Pick max. 5"

Price overrules other trends

Business lagging on dynamic / personalized pricing

Price not most often mentioned by shoppers, but when mentioned, it's the most influential trend. Also among crisis resistant buyers.

Business positioning

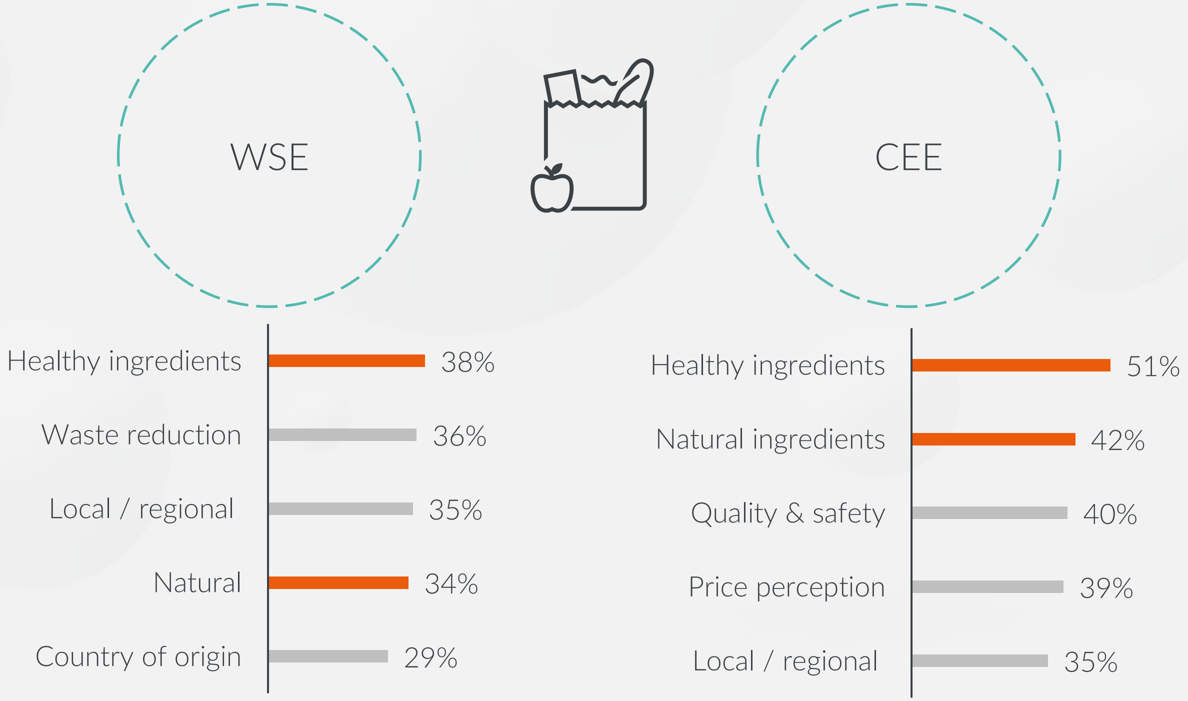
"We're on top of it":	"We're lagging behind":
Quality / safety (+)	Personalized promo / ads (-),
Healthy ingredients	Local / regional products
Natural ingredients	Price perception

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022 "Pick 1 most influential"

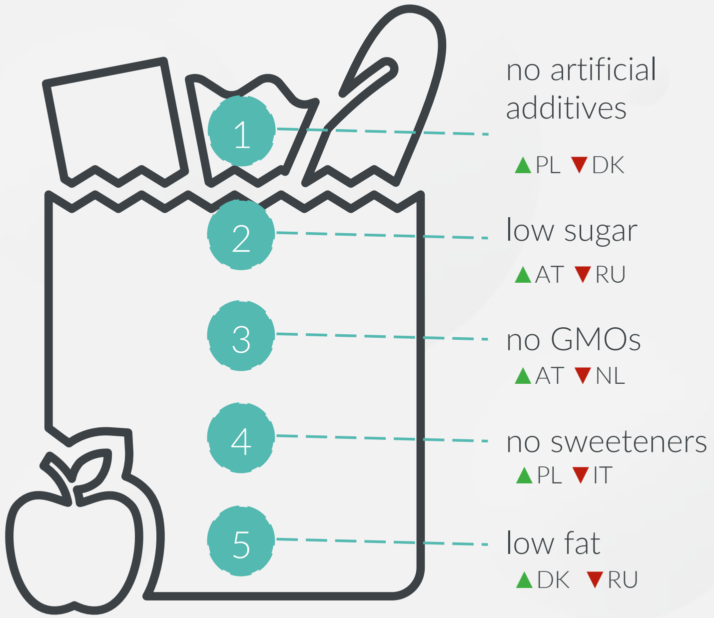
‘Naturally healthy’ crisis resistant

Top 5 choice drivers in both WSE and CEE

Shopper perspective | next year



Healthy ingredients



Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; GfK ConsumerPanel, Harmonized Statements, EU-14 MAT ‘21

Curing versus prevention

Attention turns healthier general lifestyle

2 out of 3 Say they do a lot for their health and/or their mental balance

Wearables Growth by year

Sales value

2020	32%
2021	42%

Blood oxygen levels

Blood sugar levels

Quality of sleep

Health behaviors

EU-14

Attention to healthy diet	52% DK, NL
Exercise regularly	38% NL, SE
Often on a diet	20% IT, RS

Health problems

EU-14

High blood pressure	17% HU, SK
High cholesterol	12% IT, PL
Diabetes	11% HU, PL

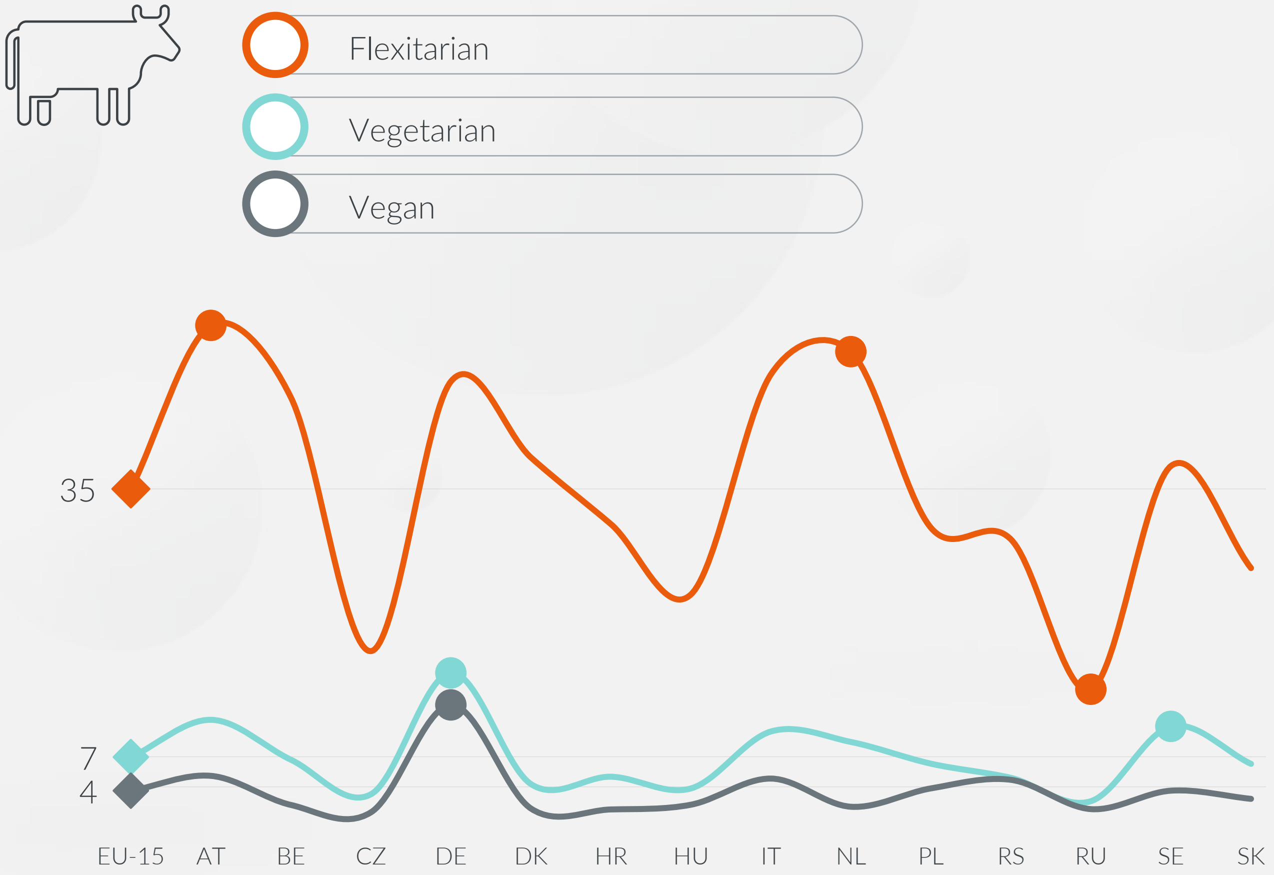
Source: GfK ConsumerPanel, Harmonized Statements, EU-14 MAT '21 and GfK Market Intelligence: Sales Tracking

Animal versus plantbased

Flexitarian lifestyle prominent nearly everywhere

3. TREND IMPACT

% of HH with at least 1 person



Alternative foods into mainstream

- Plantbased more influential: 14%
- Animal friendly more influential: 18%
- 27% penetration for meat replacers (EU-14)
  ▲NL (52%) ▼HR
- Volume declines Jan 22 vs. Jan 21
  - -4% fresh meat ▲HR & RS (EU-10)
  - -7% yoghurt ▲SK (EU-13)

Netherlands to make biggest ever public investment in cellular agriculture

14 April 2022

The Dutch government has announced a record €60 million of funding for cultivated meat and precision fermentation.

Photo credit: Mosa Meat

The Dutch government has announced €60 million ($65.4 million) of public funding to support the formation of an ecosystem around cellular agriculture – or cultivating meat directly from cells, and producing animal-free dairy. The package represents the world's largest-ever public investment in the cellular agriculture field.

Source: GfK ConsumerPanel, Harmonized Statements, EU-14 MAT '21; Behavior Change survey EU-15 n=7,855 April 2022

Inflation further accelerates this shift

Cutting down meat consumption has strong savings effect

3. TREND IMPACT

DENMARK | Behavior change
Meat

43%
Yes

I'm worried and will change my behavior

WHAT?

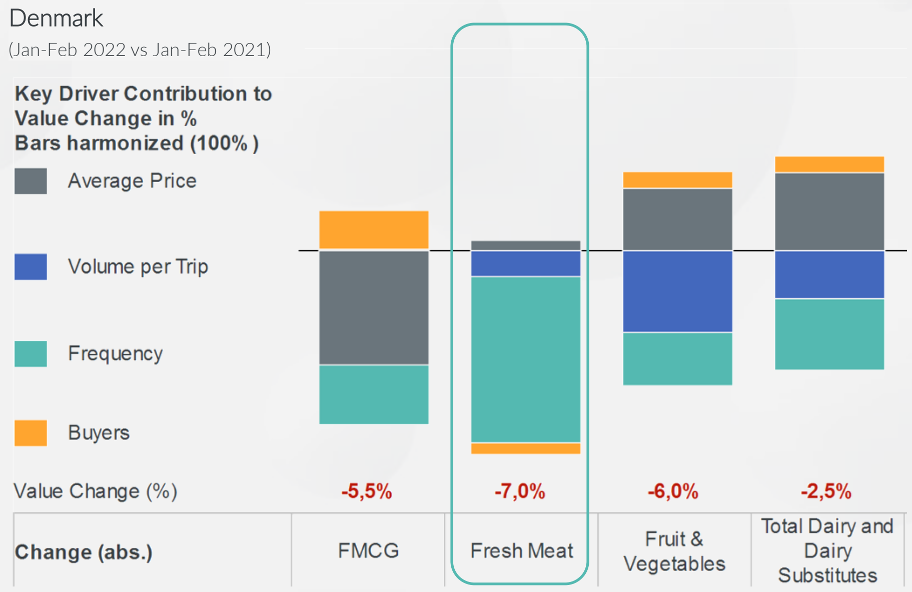
32%
Meat

Making meat no.2 category in DK

HOW?

30%
Buy less

DENMARK | Market effect
Meat



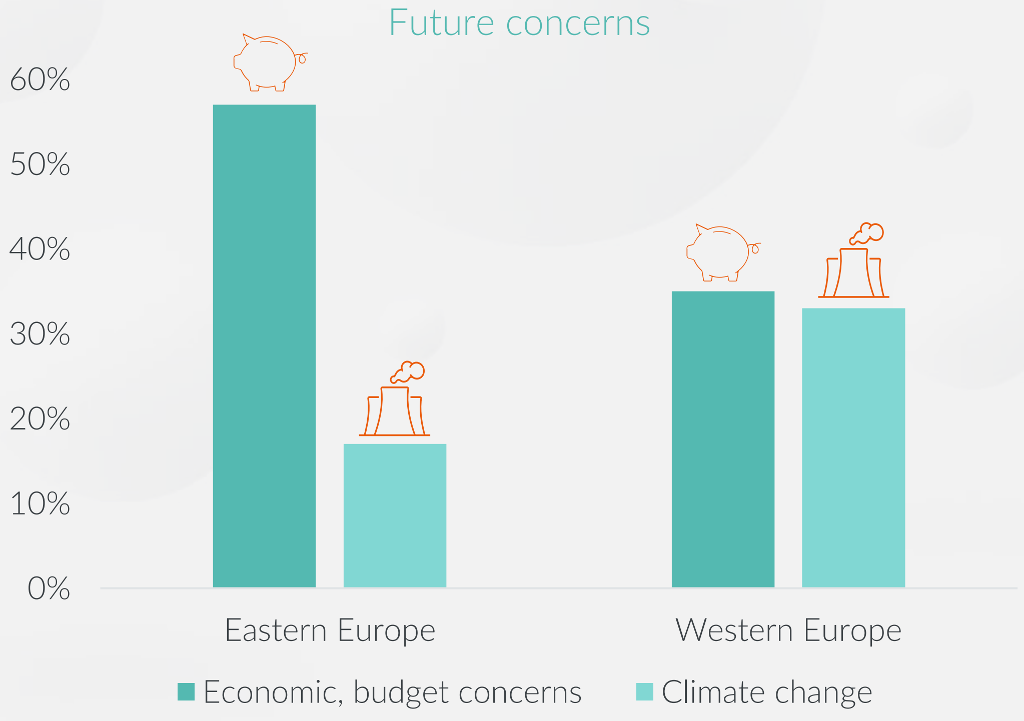
Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; ConsumerPanel Denmark

Glamourous to be green

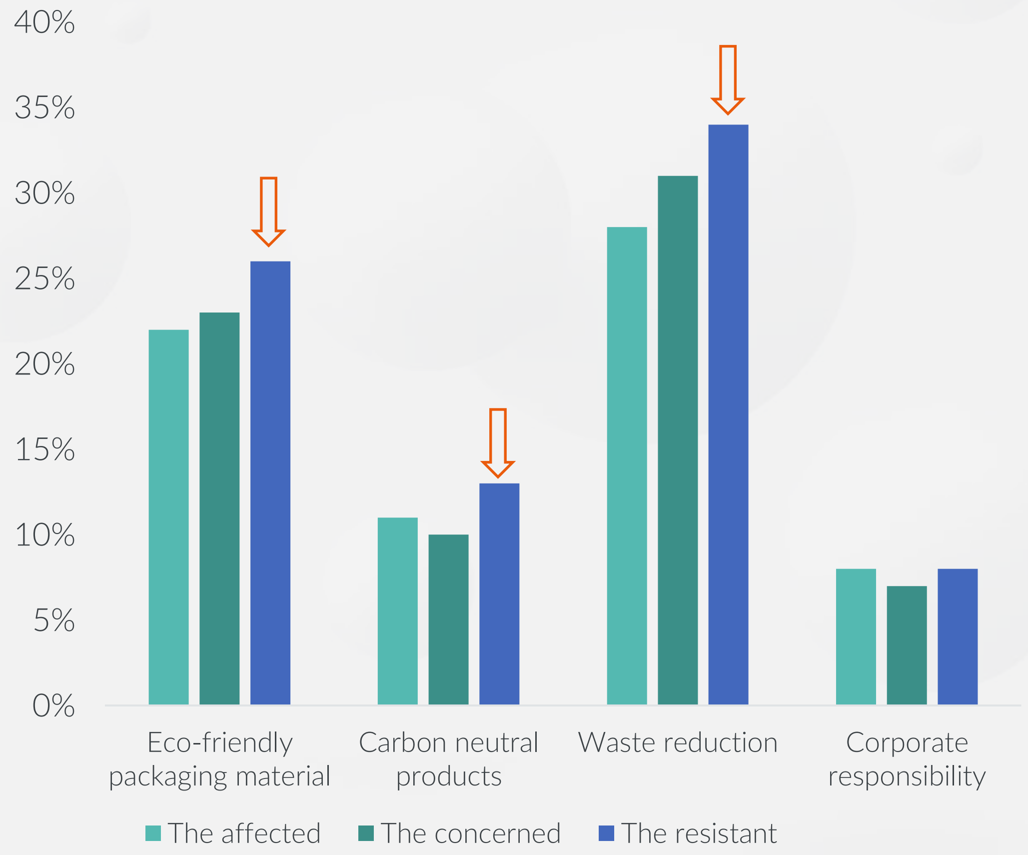
New tale of two speeds

Today's shopper

- Budget concerns affect the green momentum
- Doing good needs to be associated with saving money



Trends



Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022

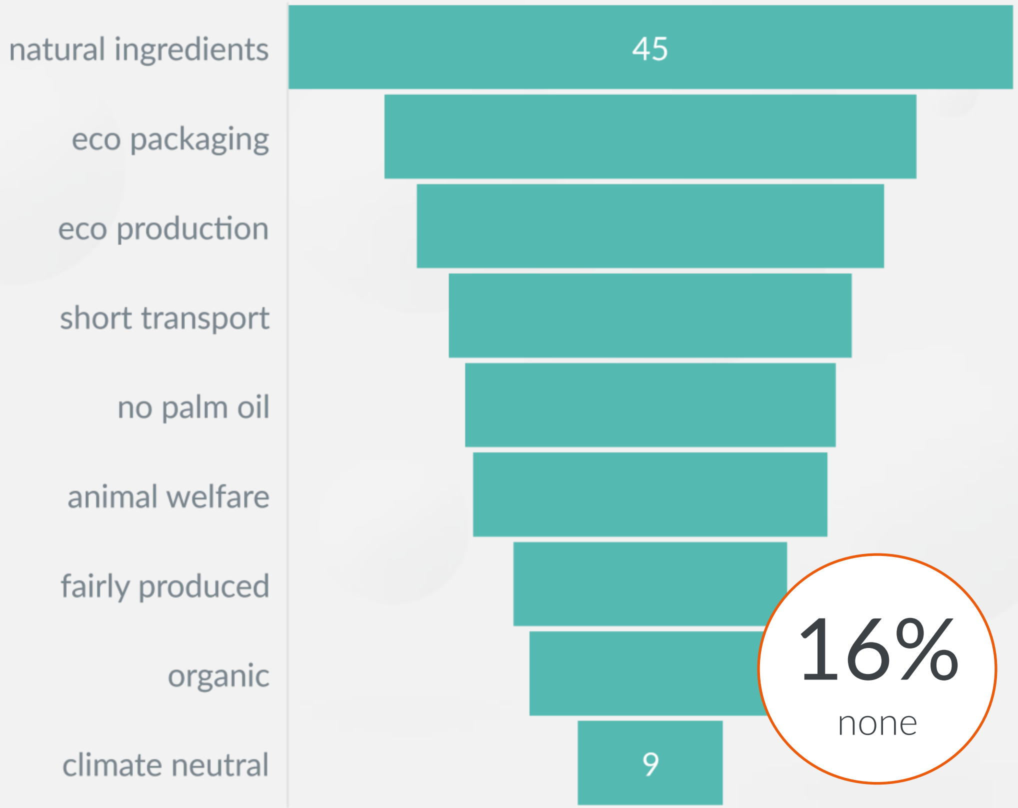
Green saving versus green premium

Packaging, production and transport worth a premium

3. TREND IMPACT

Savings motive

Willingness to pay



Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; GfK ConsumerPanel, Harmonized Statements, EU-14 MAT '21

Natural versus organic

Shoppers see real value in natural products

3. TREND IMPACT

Influencing trend next year

38% Natural

16% Organic

Top countries:

▲RS & RO
▼CZ & SK

▲DK & RS
▼DE & AT

3x as many shoppers willing to pay for natural than for organic

Organic sales are driven by the resistant

Average value share of the resistant (EU-14)

Organic 53%

FMCG 48%

Organic price premium less justified across shopper types than natural

Source: GfK, Behavior Change survey EU-15 n=7,855 April 2022; GfK ConsumerPanel, Harmonized Statements, EU-14 MAT '21

4. SEGMENTS TO WATCH

- UA war
- COVID-19
- Inflation

1

Choice drivers

- Basket
- Channel

2

Behavior change

3

Trend impact

- Crisis types
- Eco types

4

Segments to watch

- Store choice
- Industry take
- E-grocery

5

Retail view

6

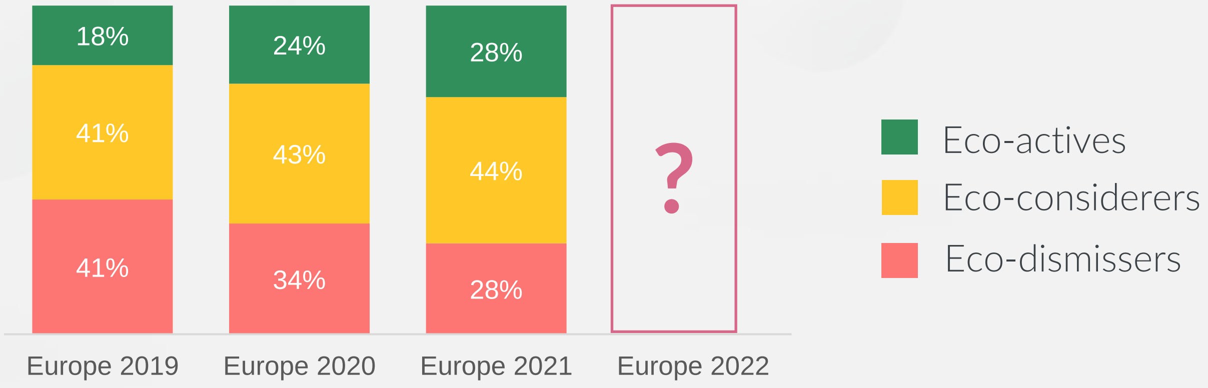
Coping strategies

Eco types: concern and action

With shifting concerns, growth of actives might stall

Why?

- Eco-actives have been **growing in numbers** exponentially
- Lack of **affordability**, **findability** and **ease** are barriers
- Today, the green momentum **might be peril....**
  if sustainable options don't appeal to value for money sentiment



- GERMANY | soft drinks

	Eco-actives	Eco-dismissers
Penetration	84%	91%
Spend per buyer	€110	€147

Source± GfK, Kantar, Europenel Who Cares? Who Does? report 2021 | ConsumerPanel Germany MAT '21

Eco-type Digital Usage Profiler

Eco-active are lifestyle oriented, dismissers consumption oriented

4. SEGMENTS TO WATCH

Where to reach them? Germany

Taster of top websites visited by eco-actives
- >10% reach
- >110 index versus average

373 million impressions

55 million impressions

Where to reach them? Germany

Taster of top websites visited by eco-dismissers
- >10% reach
- >110 index versus average

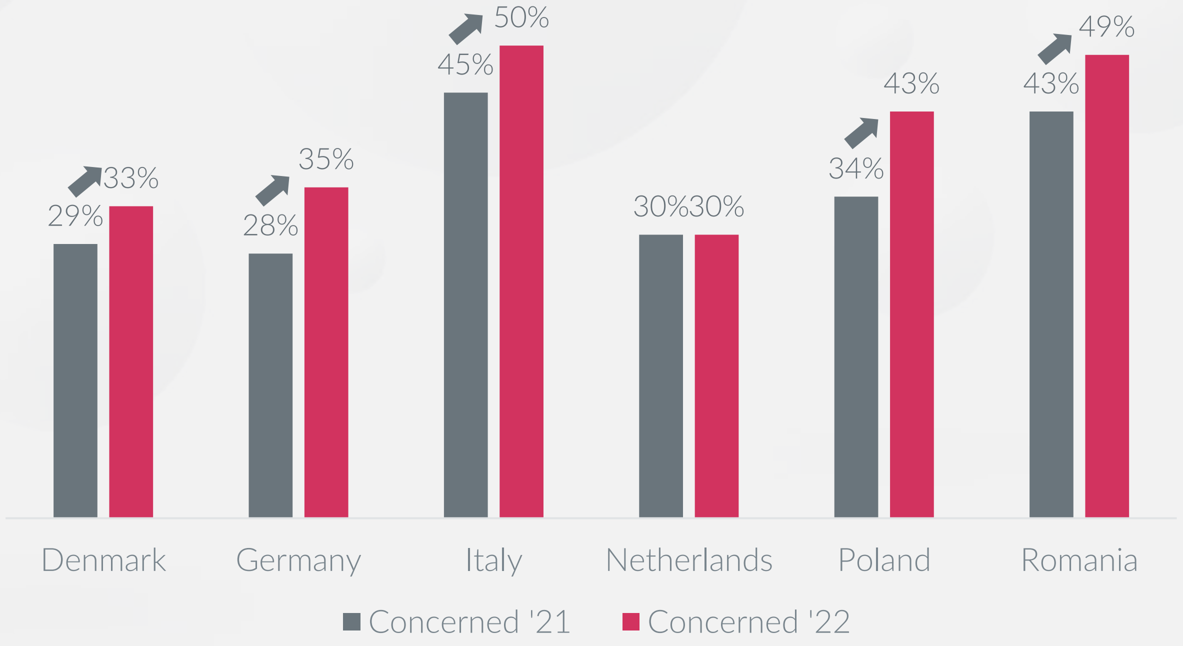
GfK Integrated Solutions Digital Usage Profiler Germany Sept ´21 / Feb ´22

Crisis types: pressure on the resistant

Why?

- General insecurity is causing a major shift in purchasing and consumption habits

Growth of % the concerned



Resistant versus Affected lifestyle index

"I buy what I like" – index 120
"I decide spontaneously what to buy" – index 92
"I'm suspicious of ads" – index 91

"I'm often on a diet" – index 83
"I exercise regularly" – index 123
"I take care of my mental balance" – index 112
"I prefer to prepare quick meals" – index 88

Crisis types purchasing effects

Average spend per buyer (€) EU-14

	Fresh vegetables	Potato chips	Yoghurt
Affected	€129	€27	€46
Concerned	€133	€25	€48
Resistant	€146	€24	€54

Source: GfK Behavior Change survey 2021 (April n=3886) & Behavior Change survey 2022 (April n=3152) selected countries

Crisis-type Digital Usage Profiler

GfK CPS | YouGov*

Affected look for savings (food waste!), resistant for smart finance

Where to reach them? Germany

Sample of top websites visited by the resistant

- >10% reach
- >110 index versus average

Greedy FINANCE

speisekarte.de

BENZIN PREIS

Preis.de

mein schöner Garten

Where to reach them? Germany

Sample of top websites visited by the affected

- >10% reach
- >110 index versus average

174 million impressions

Too Good To Go

change.org

McDonald's

mydealz

Lieferando.de

indeed

twitch

CHECK24

Source: GfK Integrated Solutions Digital Usage Profiler Germany Sept ´21 / Feb ´22

- UA war
- COVID-19
- Inflation

1

Choice drivers

- Basket
- Channel

2

Behavior change

3

Trend impact

- Crisis types
- Eco types

4

Segments to watch

- Store choice
- Industry take
- E-grocery

5

Retail view

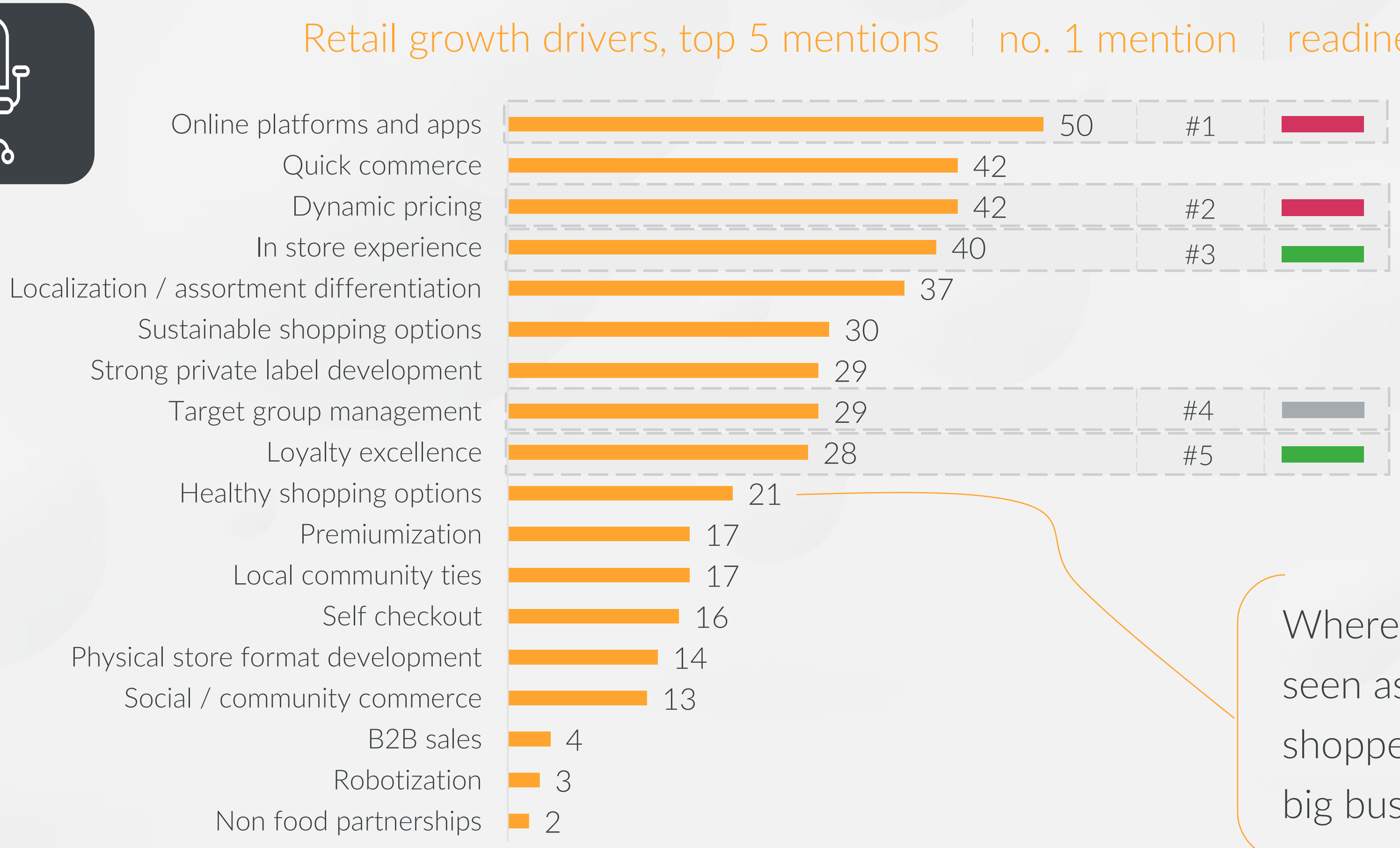
6

Coping strategies

E-grocery believed to drive growth most

Yet business are not ready to take advantage

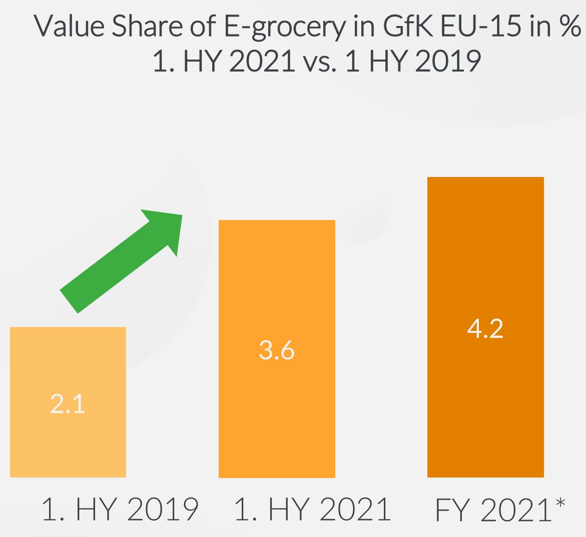
4. RETAIL VIEW



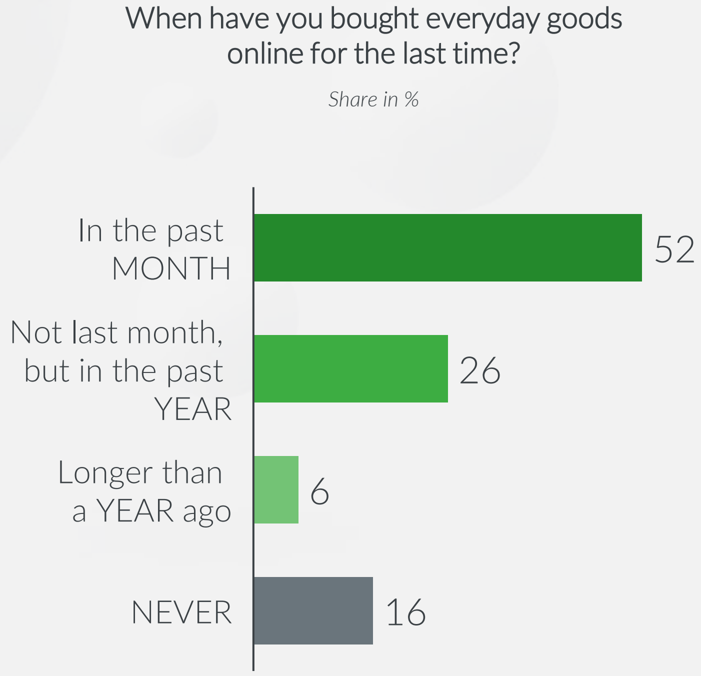
Whereas healthy products were seen as the no.1 growing trend by shoppers, it is not recognized as a big business opportunity for retail

More and more shoppers in Europe buy grocery online

E-grocery value share nearly doubled in the last two years in Europe



More than every second shopper in Europe has bought last month at least once everyday goods online



Attractive prices, promotions & delivery fees and right assortment are the main reasons to start buying groceries online

Source: GfK - E-grocery EU-8 report, December 2020 | GfK ConsumerPanel Omnichannel report | *EU-14 data

E-grocery players in Europe

European overview

E-grocery

Clicks & Bricks

- Omnichannel
  - ah
  - ICA
  - REWE
  - JUMBO
  - TESCO

Pure Players

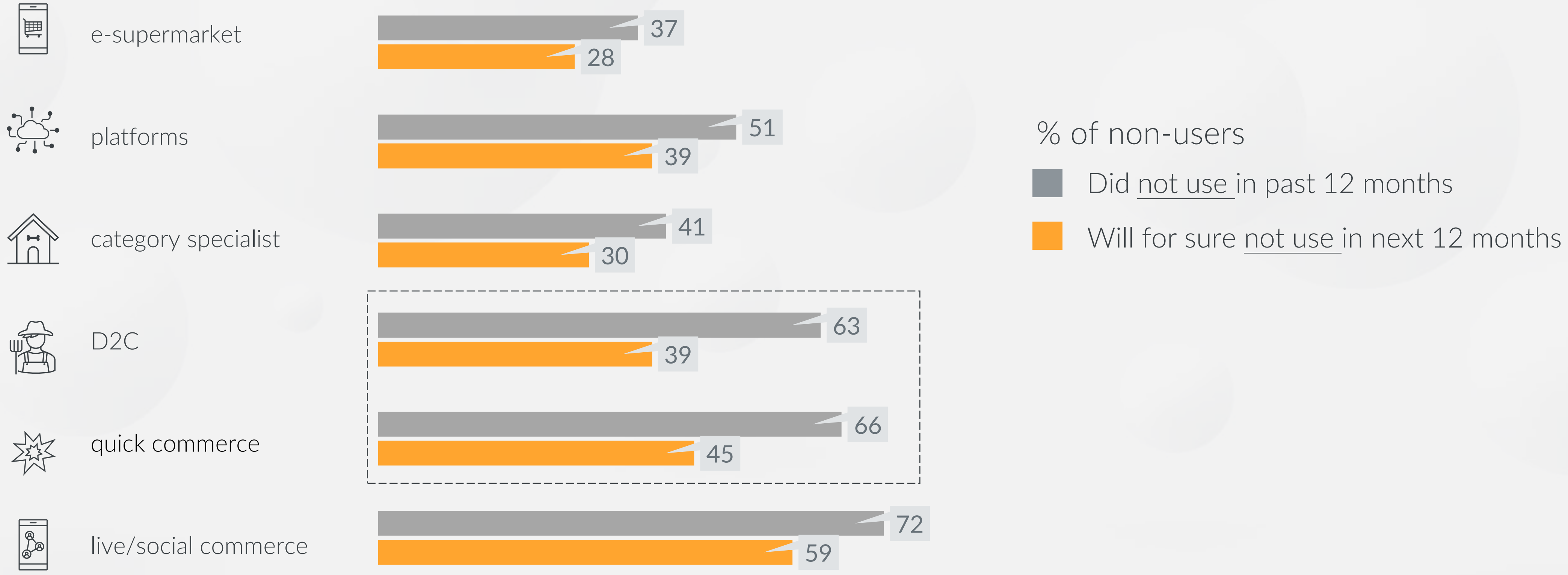
- Pure Supermarkets
  - PIC NIC
  - ocado
  - rohlik group
  - oda
  - crisp
  - amazonfresh
  - MatHem.se
- Quick Commerce
  - getir bi mutluluk
  - JOKR
  - Flink
  - GORILLAS
  - mjam market
- Platforms
  - Glovo
  - everli
  - DOORDASH
  - Wolt
  - gopuff
- Category Specialists
  - zooplus
  - FRISCHEPOST
  - flaschenpost.de
  - Farmy
  - YABABA
  - pieter pot

D2C and quick commerce attractive

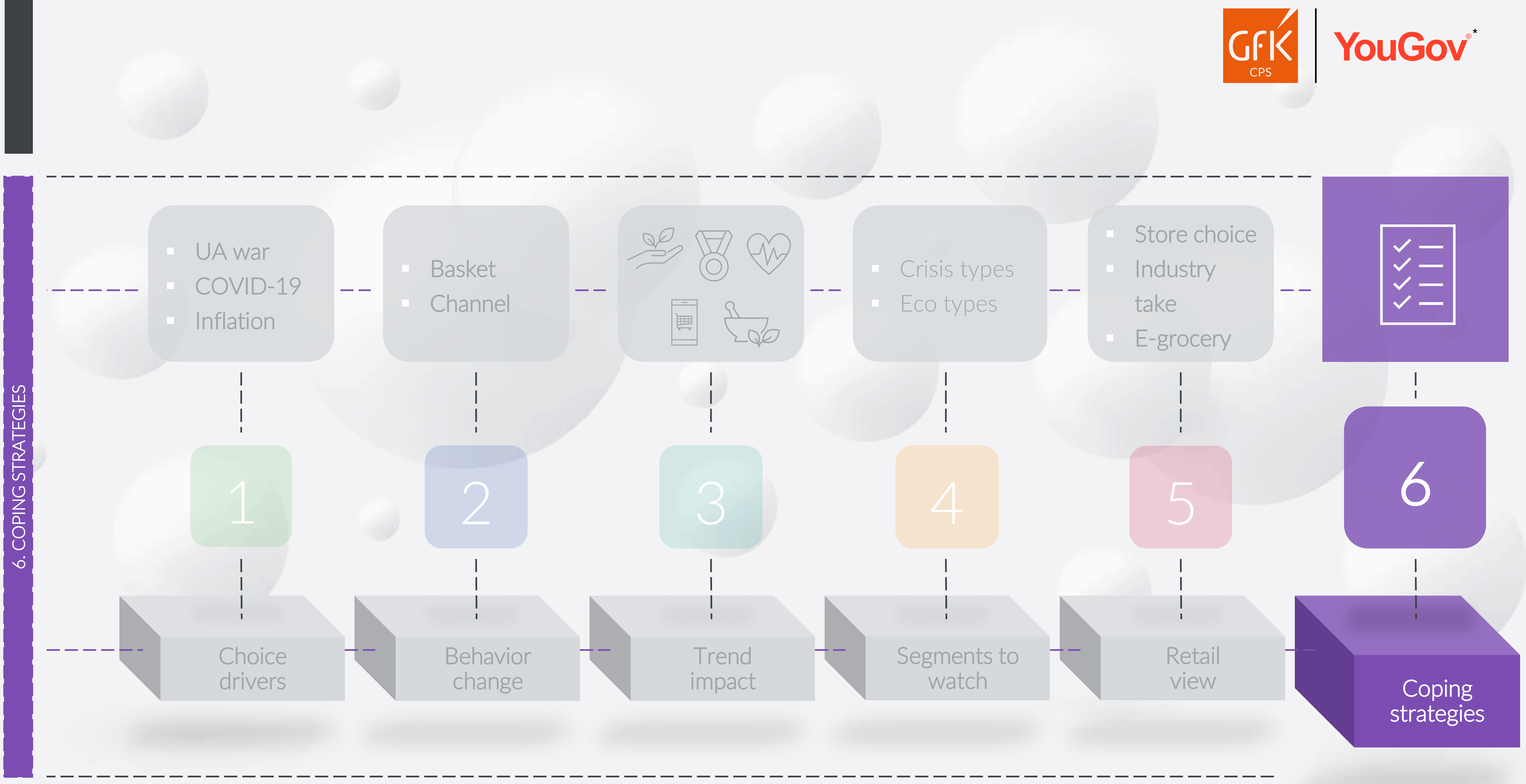
Stand to gain most new buyers in 2022

E-grocery landscape: now versus next

Of everyone that shopped online, % did not use:



*Flash delivery excl. CZ. EU-8 n=7547; EU-7 n=6566 | Q7 & Q9 | *Please refer to the appendix for sample size, question text & definition



GfK CPS
YouGov
6. COPING STRATEGIES
UA war
COVID-19
Inflation
Basket
Channel
Crisis types
Eco types
Store choice
Industry take
E-grocery
1
2
3
4
5
6
Choice drivers
Behavior change
Trend impact
Segments to watch
Retail view
Coping strategies

Five key strategies

to cope and thrive in current market conditions

Strategy 1: Relentlessly work to meet shopper (omnichannel) expectations

GfK CPS | YouGov

Continue with high level of in store excellence and be sure to apply this with equal rigor online. The more experienced your shoppers get, the more important inspiration, loyalty rewards and personalization become.

Shopper satisfaction: brick & mortar outscores online

4.0/5

3.9/5

3.8/5

Satisfaction drivers differ along the shopper maturity curve

Light Shopper

Frequent Shopper

Simplicity

Findability

Experience

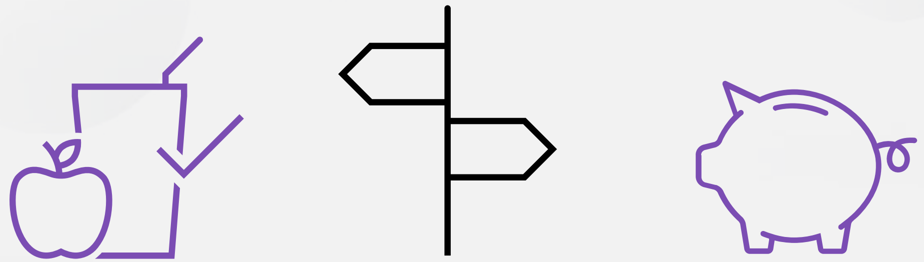
Source: GfK e-grocery report EU-8, Key Driver Analysis

Strategy 2: Focus on key trends

Natural worth a premium, green when saving money

#1 Naturally healthy is a crisis resistant opportunity

- Preventative health, balanced and natural in demand
- Keep investing in meeting this demand
- Help (affected) shoppers by nudging them the right way
- Budget squeeze should not jeopardize healthy choices



#2 Glamorously green and saving (money) to keep the green going

- Green worn as a badge of honor by eco-actives
- Manufacturers and retailers must make it attainable
- Affordability and saving merged with green side-effects
- Improve in-store findability

59% Too expensive

40% Too busy

33% Distracted in store

Source: GfK, Kantar, Europanel WCWD report 2021

Strategy 3: Dynamic and relative pricing

Investment and value for money management are key

Shoppers today:

- High inflation increases importance of price in decision making

Usually, **55%** Price focused

Today, **37%** is financially struggling

And,

56% Will check price (even) more

49% Will wait for promotions (even) more

45% Will keep total basket amount low(er)

Investment in brands is key to curb PL growth, especially where impulse purchasing is under serious pressure

Source: GfK Consumer Life, GfK Market Intelligence: Sales Tracking,

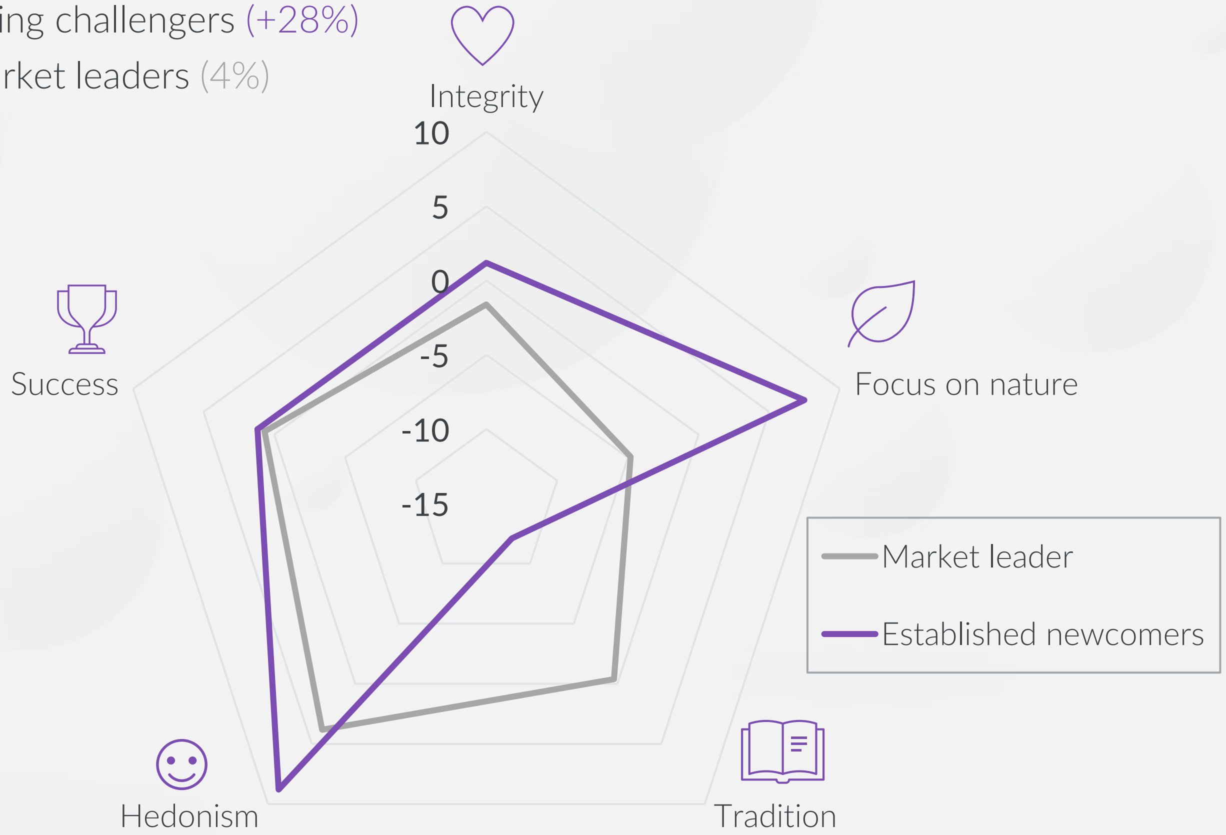
- Behavior change in times of instability

Strategy 4: Build strong brand identities that resonate with consumers

6. COPING STRATEGIES

Germany

Winning challengers (+28%)
vs market leaders (4%)



Functionality
Necessary but no longer sufficient to thrive

Emotionalisation
Individual fun and indulgence are key factors, but less central

Responsibilization
Growing success factor when paired with emotionalization

The right balance
No unlimited license from consumers to engage and speak up

Source: DE Kronberg study - GfK Consumer Panel FMCG; Why2buy, value dimensions, basis: revenue, YTD 11/ 2021

Strategy 5: Re-think shopper segmentation in light of the 'latest normal'

6. COPING STRATEGIES

People that may have fallen within the same targeting bracket previously now have completely different needs.

Time to rip up your shopper segmentation

Develop rich and granular personas based on new portfolio of needs

Use data-driven insight to create needs-fueled messaging, product positioning, promotions and merchandising

Be constantly mindful of changing behaviors, reflected by what shoppers think, buy and why.

Five key takeaways for the year ahead

6. COPING STRATEGIES

1 — Beat budgeteering by investing in your brand

Budgeteering

1 in 2 will change their purchasing behavior. Value for money perception, pre-store priming and relative pricing are key.

2 — Natural, waste reduction and local are resistant influencing factors

Balance

Invest in stronger, bolder brand identities beyond functionality, driven by emotional connections.

3 — Don't strike out on sustainability–be sure to make it attainable

Purpose

Be on point to clearly differentiate and offset potential risks of failing to act. Focus on affordability/saving and findability.

4 — Be where the shopper is and create seamless journeys

Findability

Adopt holistic, omnichannel strategies reflective of the changing retailer landscape.

5 — Build data-rich shopper personas that reflect the 'latest normal'

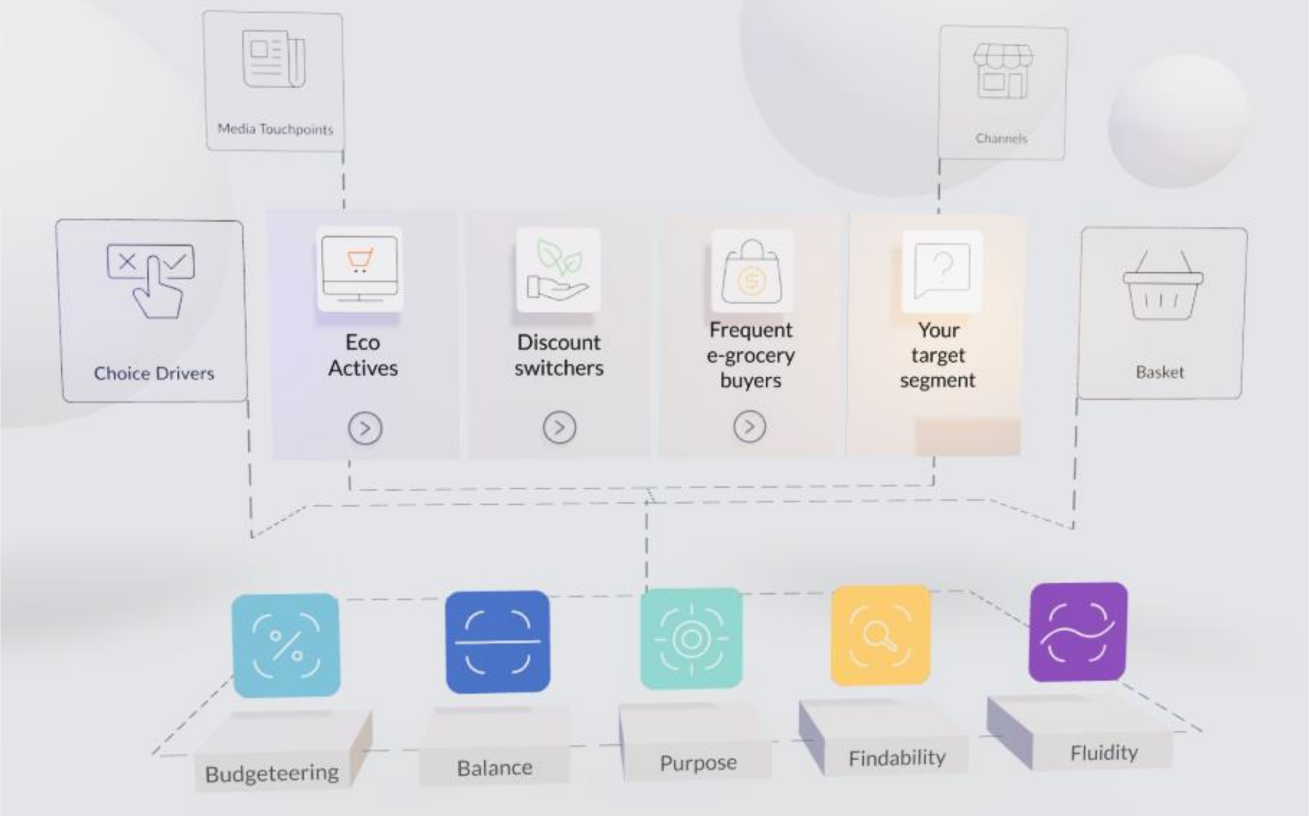
Fluidity

Rethink segmentation and create shopper personas that reflect the 2022 reality of demographics.

#BehaviorChange

BEHAVIOR CHANGE IN TIMES OF INSTABILITY

Visit our Behavior Change Hub at gfk.com/behavior-change



Your CPS GfK contacts

Please don‘t hesitate to contact us

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