nailbiter   Nestlé

No More Labels:

Understand Shoppers and Consumers as People

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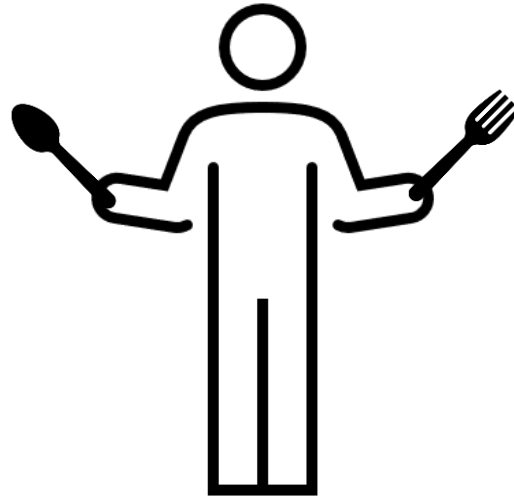President, Head of Client Consulting
at Nailbiter

What is a Shopper?

Example traditional Shopper Insights research types:

- In-Store and Online category understandings
- Shelving Guidance

What is a Consumer?

Example traditional Consumer Insights research types:

- Product Usage
- Brand Performance
- Packaging

Shopper

Consumer

Corporate needs you to find the differences between this picture and this picture.

They're the same picture.

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What happens when you get it right?

❌ WHAT HAPPENS WHEN YOU GET IT WRONG

- Innovation teams make products that don't perform well in retail

- Make packaging changes that impact your at-shelf performance

- Misdiagnose the reason behind retail performance

- Reacting to current marketplace performance

✓ WHAT HAPPENS WHEN YOU GET IT RIGHT

- Impactful Innovation

- More successful packaging changes

- Clear understanding of post-launch / ongoing retailer performance

- Set the retailer up to deliver successfully against need states

- Proactively preparing for the future of the marketplace

NUSA CMI Organization: Ways of Working

We must…

Widen our consumer aperture

Simplify the complex to unlock speed

Drive agile planning & optimization

Elevate our people's Insights capability

Division Co-Pilots

Shopper Insights

Analytics

Foresight

Mission: to create a truly **human obsessed** culture, **driving competitive advantage** with inspiration and provocation that **enables transformative action** in Commercial Teams
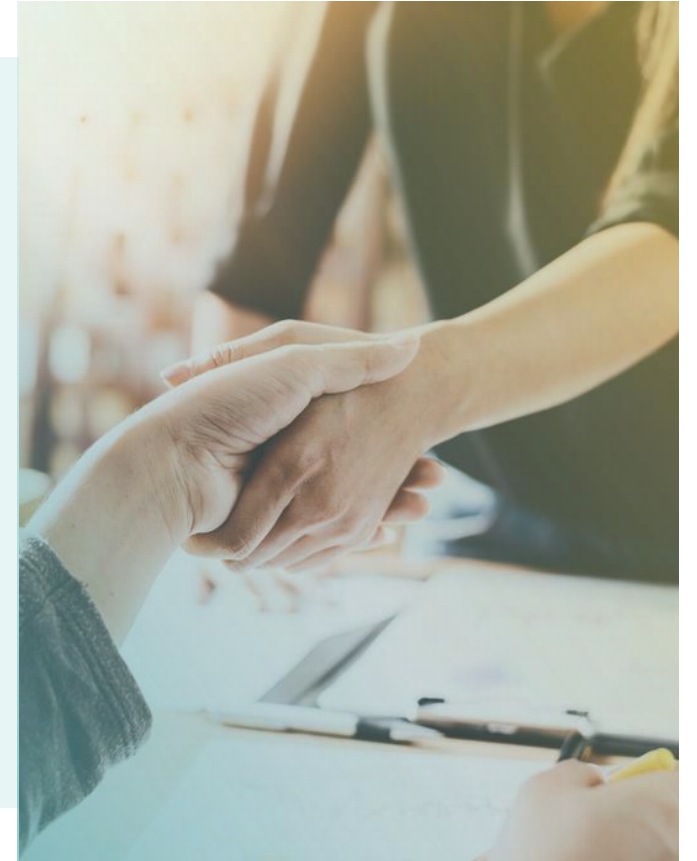
Nailbiter has been providing Nestle with a deeper understanding of consumer and shopper insight by capturing behavior and feedback at the moment-of-truth using videometrics **for over 10 years**!

Objectives Covered:

▶ In-Store Shopper Tracking

▶ New Product Launch Tracking

▶ Brand Success Drivers

▶ Aisle of the Future

▶ At-Home Usage & Trial

How does Nailbiter work?

1. Nailbiter consults with Clients to address their strategic business questions

2. Nailbiter finds the right shoppers at the right time to observe their behaviors

3. Shoppers make short in-the-moment videos recording their purchase and usage decisions

4. These videos and audio are converted into metrics and insights by humans with AI support

5. Nailbiter weaves these metrics into powerful brand, category and retailer stories

6. Metrics, Stims, Videos are available to clients via an easy-to-use Dashboard

VIDEO TYPES

IN-STORE SHOPPING

E-COMMERCE SHOPPING

PRODUCT USAGE

AUGMENTED REALITY

OUTPUTS

METRICS & SCORES

INSIGHTS & STORIES

TRACKERS & PROJECTS

VIDEO DASHBOARD

ABOUT NAILBITER

- **#1 BEHAVIORAL**: World's largest CPG quant behavioral platform. 200+ Employees as North America, Europe & Asia

- **SCALED**: Global reach with Quant sample sizes. Used by most of the Top Global CPG companies

- **VALIDATED** Technical and In-Market Validation over the past 10 years

- **ACTIONABLE** Metrics, Scorecard, Stories & Videos make the output ideal for quick and confident decisions

New Product Merchandising

Branded Display Innovation

Shelving and Packaging Optimization

Connecting Innovation with In-Store Merchandising Strategy

Shopper expectations of new product shelf placement guides merchandising and retail strategy for innovation launch
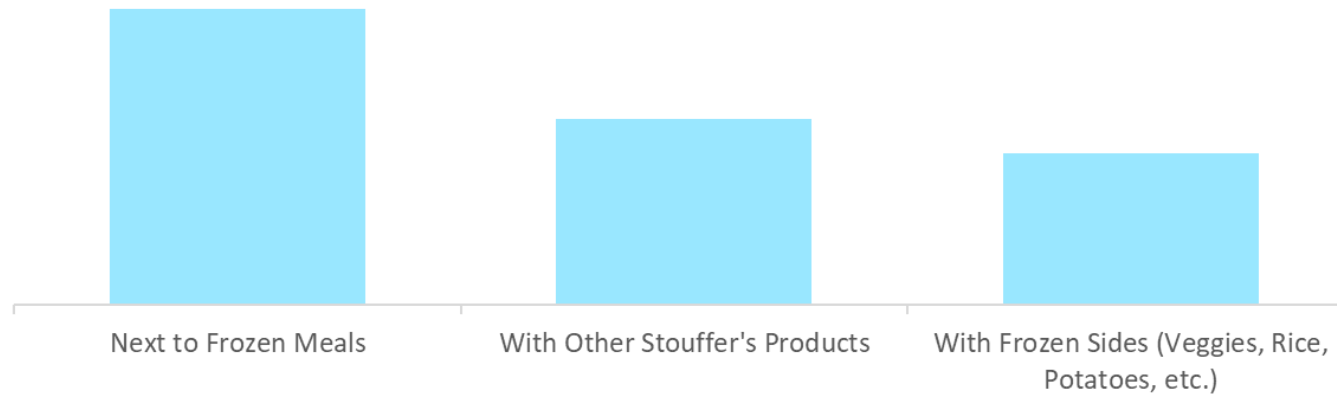
NAILBITER BRAND SUCCESS DRIVERS

TYPE: IN-STORE INNOVATION

DURATION: October 2022

BRAND: STOUFFER'S

V = 300, IN-STORE

*"My preferred location is **right here near the family meals because it would be a side.**"*

- Next to Frozen Meals
- With Other Stouffer's Products
- With Frozen Sides (Veggies, Rice, Potatoes, etc.)

- Nestle Frozen Consumer Insights team identified the need of '**Completing your Frozen Meal**' which drove innovation of Stouffer's Sides

- Shopper Insights team needed to **identify in-store merchandising strategy** – with Stouffer's? With Snacks/Apps?

Connecting Innovation with In-Store Merchandising Strategy

Shopper expectations of new product shelf placement guides merchandising and retail strategy for innovation launch

NAILBITER BRAND
SUCCESS DRIVERS

TYPE: IN-STORE INNOVATION

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3 out of 5 shoppers place near
Similar Sizes /
Complementary Products

"Family meals because of its size – it's meant to serve more than one."

"I feel like it fits best with family meals. These are sides – you have meals then you have sides to go with."

- Team used In-Store Concept tool through shopper videos to understand expected shelf placement.

- Most shoppers place in a dedicated Sides set, with the reason behind their expected placement being **Sides near similar sizes and complementary items**, indicating shoppers want a convenient 'one-stop-shop' for meals (entrees + sides).

Connecting Innovation with In-Store Merchandising Strategy

Shopper expectations of new product shelf placement guides merchandising and retail strategy for innovation launch
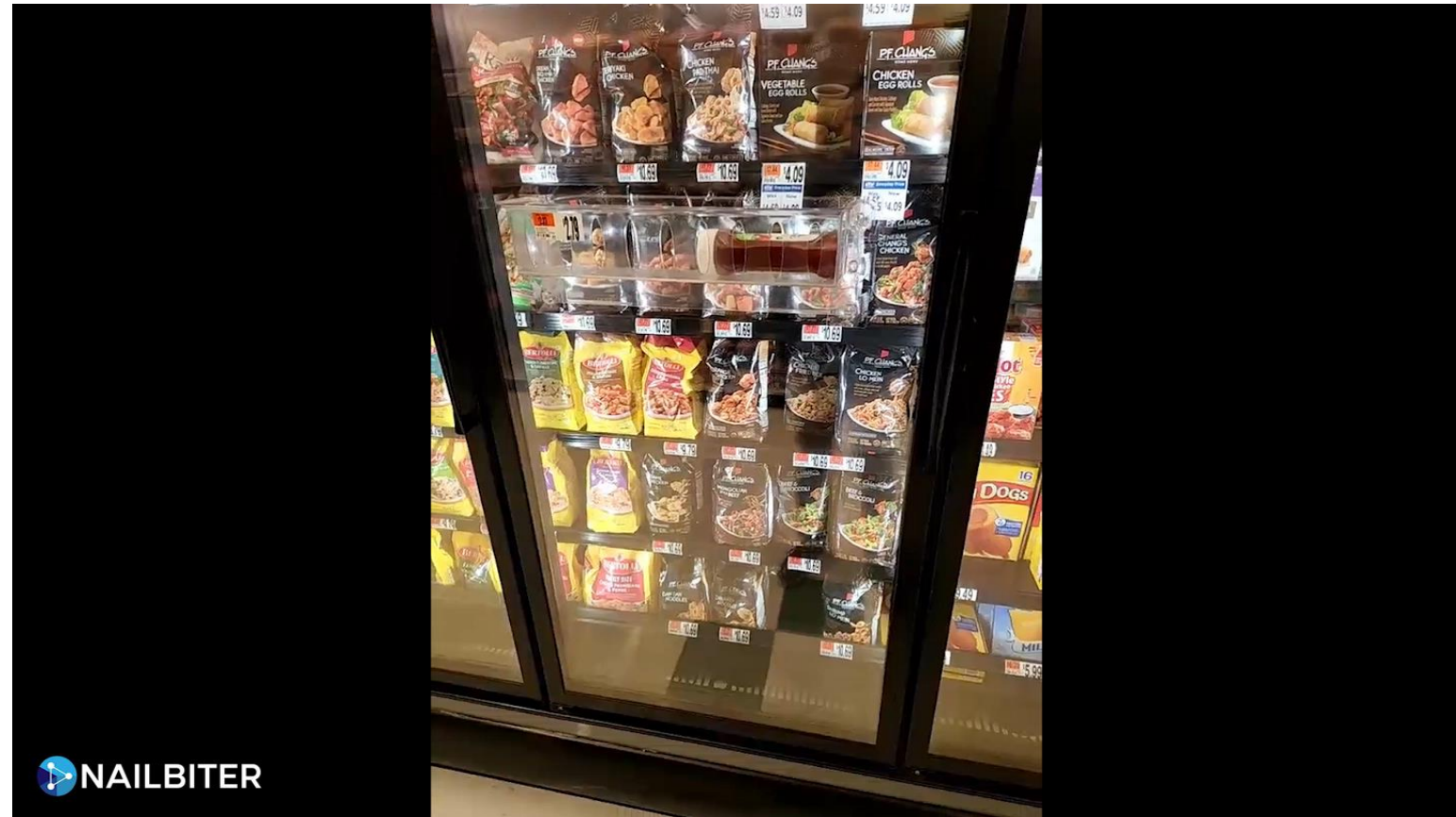

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New Product Merchandising

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Shelving and Packaging Optimization

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Branded Display Innovation

Shopper implications for display work directly influenced by a branded bake-season display

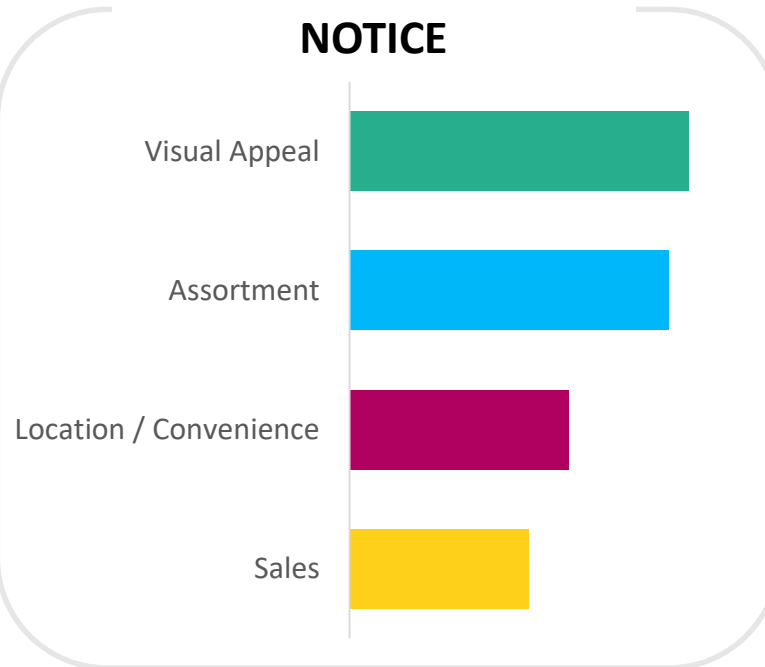**NAILBITER SHOPPER TRACKER & DISPLAY EFFECTIVENESS**

TYPE: DISPLAY EFFECTIVENESS

DURATION: October 2021

BRAND: BAKERY SWEETS

V = 425, IN-STORE

DRIVERS OF DISPLAY NOTICE

- Visual Appeal
- Assortment
- Location / Convenience
- Sales

*"This caught my eye because it is a **one stop shop** which is what I like **instead of trying to find everything in the aisle**."*

*"Look at this display, it has everything! **It even has recipes and ideas of meals you can make**. I love this display."*

- The Nestle Bakery Sweets Consumer Insights team knew from other research that people are highly **recipe driven** during Bake Season, especially for those baking from scratch.

- The Shopper Insights team partnered with NAILBITER in 2021 to understand top drivers of Display performance across categories in order to **improve their display strategy during Bake Season**, and confirmed that **Multiple Categories/Assortment** was a top driver of Display Notice and **Complimentary Categories and Multiple Flavors/Variety** were top drivers of Display Conversion.

Branded Display Innovation

Shopper implications for display work directly influenced by a branded bake-season display
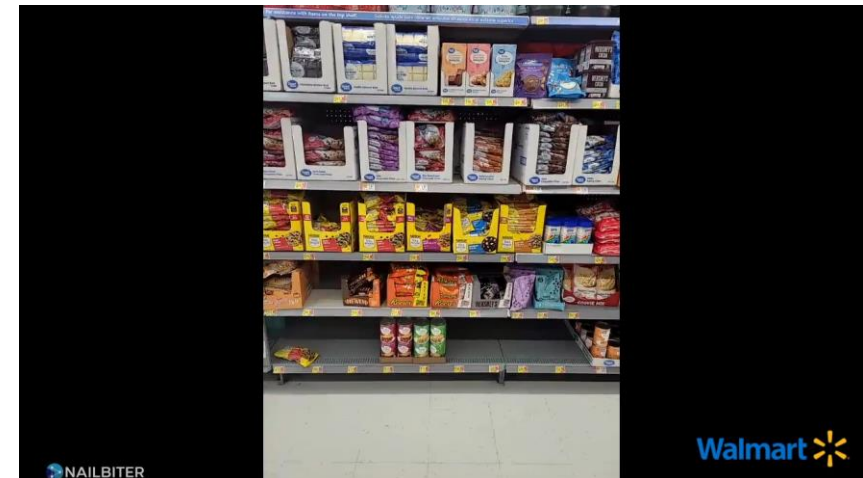

NAILBITER SHOPPER
TRACKER & DISPLAY
EFFECTIVENESS

TYPE: DISPLAY EFFECTIVENESS

DURATION: October 2021

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V = 425, IN-STORE

- Nestle team followed up with Augmented Reality testing of Solution-Oriented Display designs in 2022, and tracking of In-Store Display Execution in 2023.
- Bake Center displays executed in 2023 were **directly designed to solve the consumer's need for a solutions-forward activation in-store that combines multiple categories and drives conversion.**

New Product Merchandising

Branded Display Innovation

Shelving and Packaging Optimization

Identifying Packaging Opportunities

In-Store observation of shelving execution revealed critical packaging opportunity

NAILBITER BRAND SUCCESS DRIVERS

TYPE: BRAND SUCCESS DRIVERS

DURATION: March, 2022

BRAND: SWEET EARTH

V = 400, IN-STORE & AT-HOME

STANDING PACK
(Front Facing Out)

FLAT PACK
(Edge Facing Out)

X% of Stores Standing Pack

5X% of Stores Flat Pack

1.5X%
Both

- NAILBITER observed a **frequent flat-pack orientation** of Frozen Pizza in-store, which was hindering Sweet Earth Visibility and Notice.

- Notice for Sweet Earth is **2.8x stronger** in stores with the branded edge facing out vs imagery side.

Identifying Packaging Opportunities

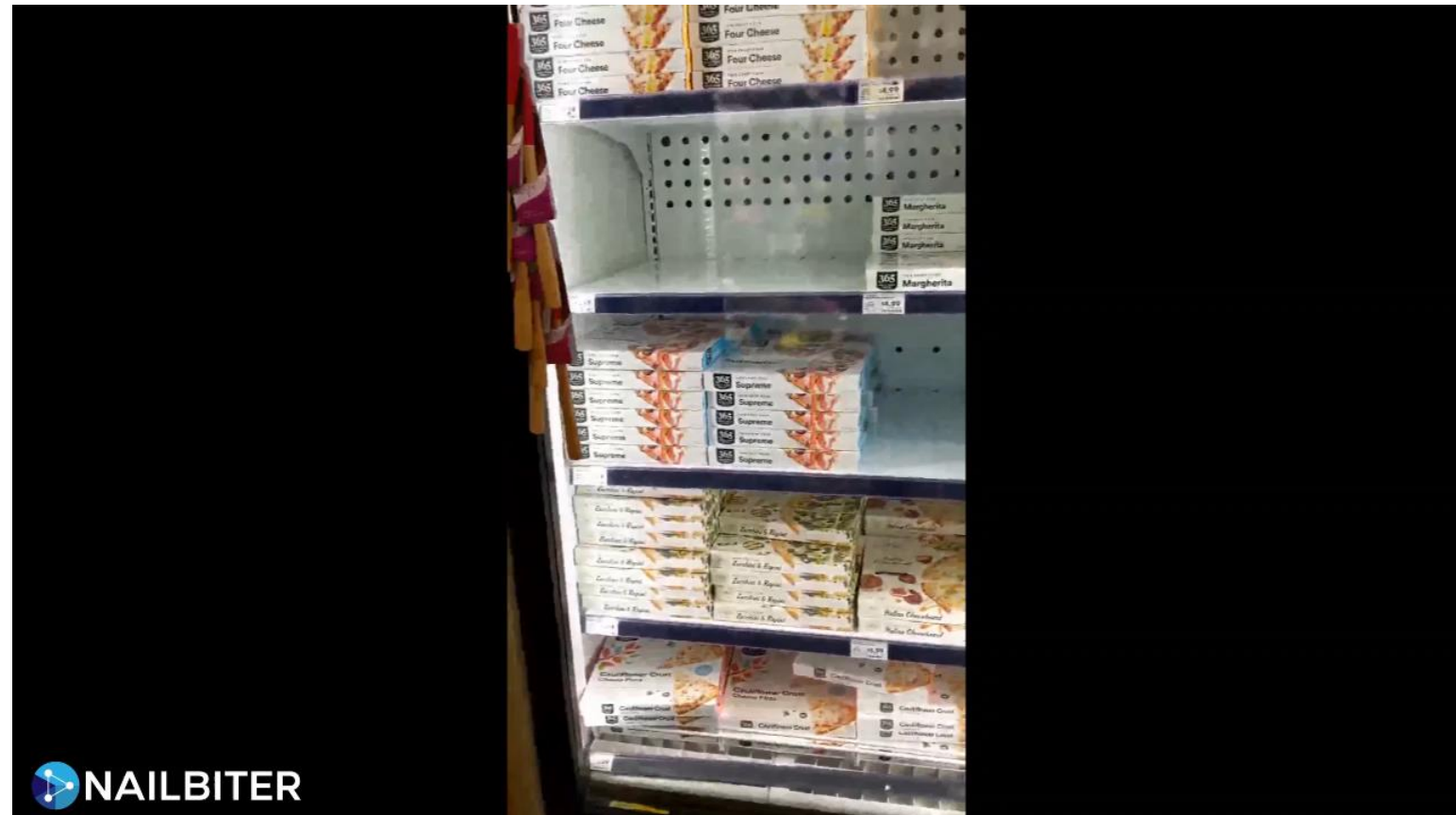In-Store observation of shelving execution revealed critical packaging opportunity

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SUCCESS DRIVERS

TYPE: BRAND SUCCESS DRIVERS

DURATION: March, 2022

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(No Sweet Earth Logo)

Most Common Edge Facing Out
(No Sweet Earth Logo)

- Other brands consistently showcase Brand and Flavor on multiple edges of the pack. Key Takeaway to **prioritize Brand and Flavor callouts on edge of pack** to help shoppers identify the product.

- Connect Shopper and Consumer Insights Teams

- Utilize Vendor Partners to help connect dots

- Don't dismiss research because it's not 'in-store shopping' or 'at-home consumption'

- Find opportunities to supplement Traditional Shopper Research with Brand questions

- Create efficiencies by reducing Shopper / Consumer silos
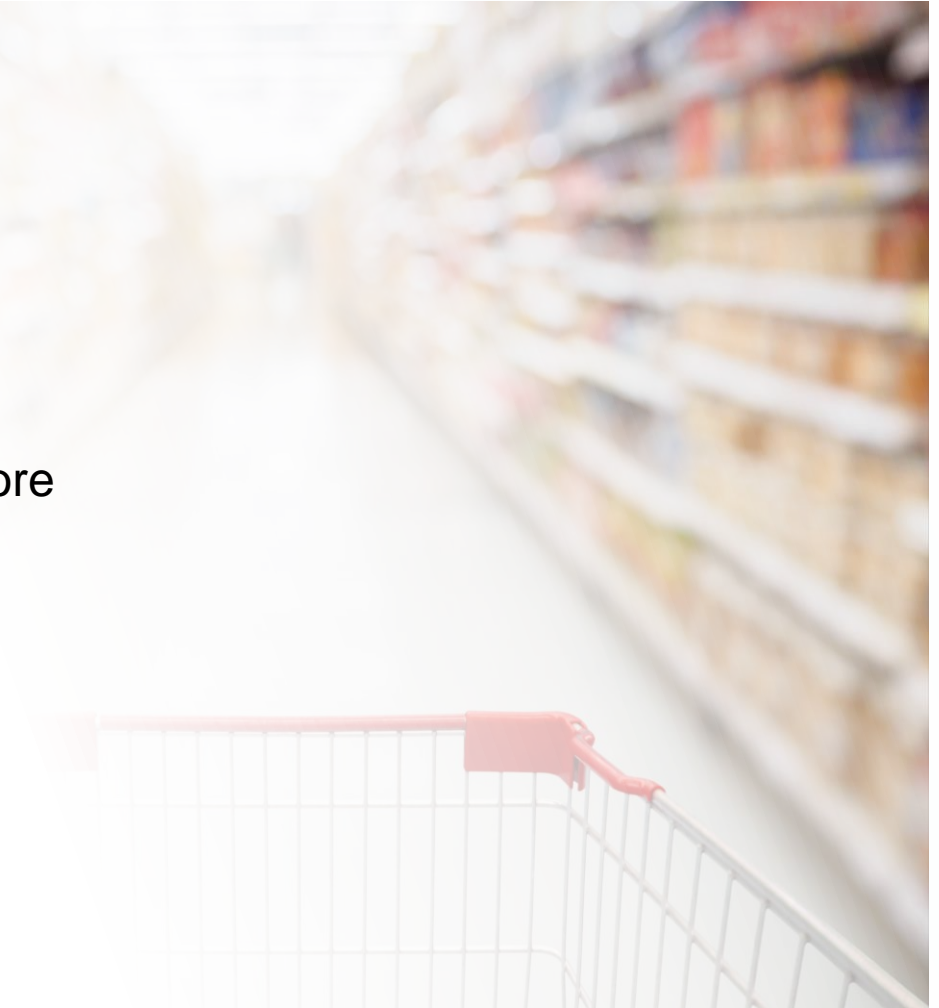
THANK YOU

CONNECT with us at

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