



# How Kraft Heinz Decoded the Fragmented Grocery e-Commerce Channel

March 28, 2023



INNOVATION POWERED BY  
NAILBITER AR VISUALIZER®

BRAND &  
NEW PRODUCT SUCCESS  
DRIVERS

SHOPPER JOURNEY/ P2P  
DISCOVERY



# Kraft Heinz Shopper Insights Mission Statement

**Champion shopper-centricity** by elevating and anticipating **shopper needs** to drive **excellence in omni-channel** and become **indispensable partners**.





## BACKGROUND

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With the variety of e-Tailers today, each with different architectural frameworks, **grocery shoppers' online behavior is becoming more complex.**



The **way shoppers shop one** e-Tailer is **not** necessarily the **way they will shop another.**



Kraft Heinz needed to **decode today's online shopper behaviors** in order to understand how to **enhance the shopper journey and shopper loyalty** across different e-Tailers to drive **increased shopper satisfaction.**



## KEY QUESTIONS

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01

Why do people shop Online?

02

Where is it most important to “win” Online?

03

What drives Basket Size?



## HOW IT WORKS



NAILBITER REACHES REAL SHOPPERS AND CONSUMERS IN ANY RETAILER, GLOBALLY, WITHOUT THE NEED OF RETAILER PERMISSIONS.



CATEGORY SHOPPERS/ CONSUMERS ARE ASKED TO RECORD THEIR PURCHASE USING VIDEO & TO NARRATE THEIR DECISION-MAKING PROCESS IN-STORE OR ONLINE.



THE NAILBITER AUGMENTED REALITY (AR) PLATFORM CAN SHOW VIRTUAL PRODUCTS, PLANOGRAMS, AND DISPLAYS TO SHOPPERS/ CONSUMERS TO CAPTURE THEIR FIRST MOMENT OF TRUTH.



VIDEO AND AUDIO ARE CODED TO REVEAL VIDEOMETRICS. THESE LEAD TO NAILBITER PRODUCTS & APPLICATIONS

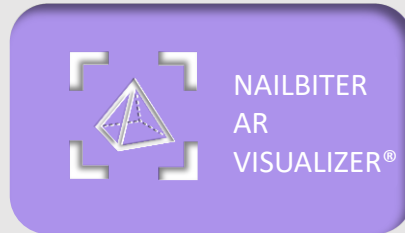
## PRODUCTS & APPLICATIONS



- [OMNICHANNEL] SHOPPER JOURNEY
- AISLE OF THE FUTURE
- MARKETING EFFECTIVENESS
- IMPULSE TRACKER



- NEW PRODUCT TRACKING
- BRAND & PACK EVALUATION
- IN-HOME PRODUCT USAGE



- CONCEPT, PRODUCT, & PACK OPTIMIZATION
- PLANOGRAM & AISLE OPTIMIZATION
- DISPLAY & MARKETING OPTIMIZATION



## THE NAILBITER SHOPPER & CONSUMER TRACKER

- VIDEOMETRICS ARE UNIQUE, ACTIONABLE, BELIEVABLE & SCALABLE
- THE TRACKER ALLOWS CLIENTS TO CONTINUOUSLY MAP TRENDS AND OPPORTUNITIES
- THE TRACKER ANSWERS ON-GOING AND AD-HOC QUESTIONS OVER THE COURSE OF THE YEAR
- IT DRIVES STRATEGIC COLLABORATION INTERNALLY AND WITH RETAILERS
- TRACKER VIDEO CAN BE RE-MINED IN THE FUTURE TO EXPLAIN UNFORESEEN CONDITIONS
- THE TRACKER CAN BE CUSTOMIZED TO MEET ALL CLIENT NEEDS EXPECTED AND UNEXPECTED
- THE TRACKER IS ANNUAL WITH 2,3 OR 4 WAVES. AFTER WAVE 1 ALL FUTURE WAVES AND AD-HOC PROJECTS ARE DISCOUNTED BY \$22,000 (OR HIGHER)

## ABOUT NAILBITER



THE ONLY SCALED BEHAVIORAL PLATFORM BASED ON VIDEO



DEVELOPED BY CPG RESEARCHERS & DATA SCIENTISTS



ONE OF THE FASTEST GROWING DATA/ INSIGHTS COMPANIES



CERTIFIED MINORITY OWNED

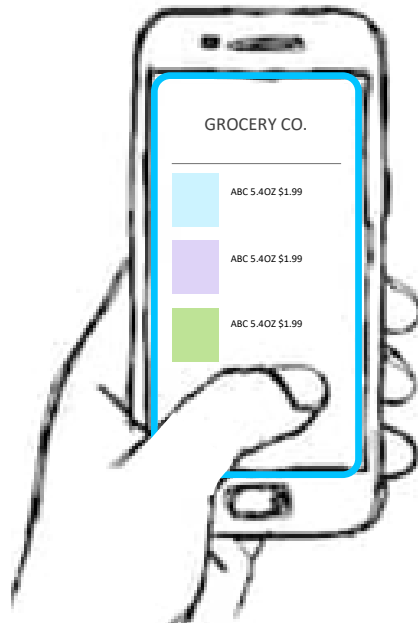




## VIDEOMETRICS APPROACH

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*Category shoppers on their next shopping trip, encouraged to talk about their experience.*



**1200** Videos



**18** Retailers



**33** Food & Bev Categories



**2022** Fielded Aug & Sep 2022

REAL SHOPPERS RECRUITED  
ACTUAL PURCHASE DECISIONS RECORDED  
NO MISSIONS – SMALL INCENTIVE AND STRICT RECRUITING ENSURE NO MISSIONS



## WHY SHOPPERS SHOP ONLINE

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Why do people shop Online?



Online shopping has become a broadly accepted and regularly utilized method of grocery shopping across all categories and outlets, utilized for the **benefit of convenience**.



A majority of Shoppers shop Online due to Convenience. Shoppers have varying definitions of Convenience; most cite the Delivery/Pickup options while some appreciate Time Savings and Prefer not to Shop In-Store.

### REASONS FOR SHOPPING ONLINE: CONVENIENCE

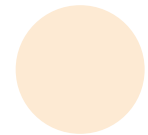
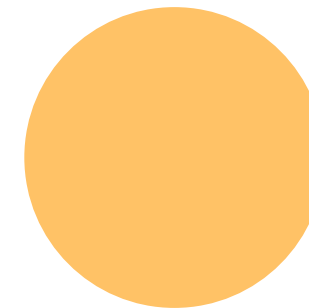
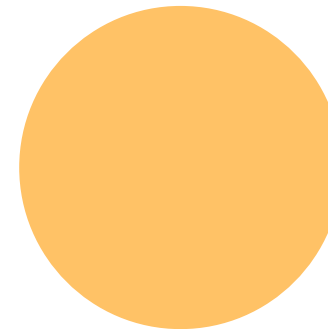
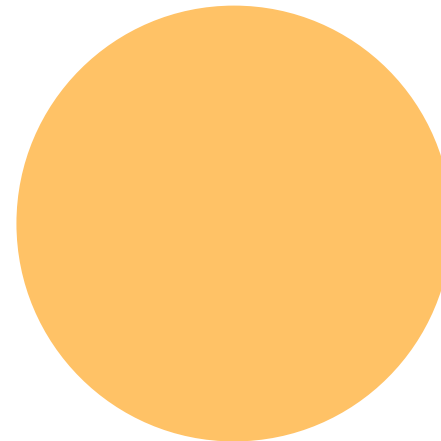
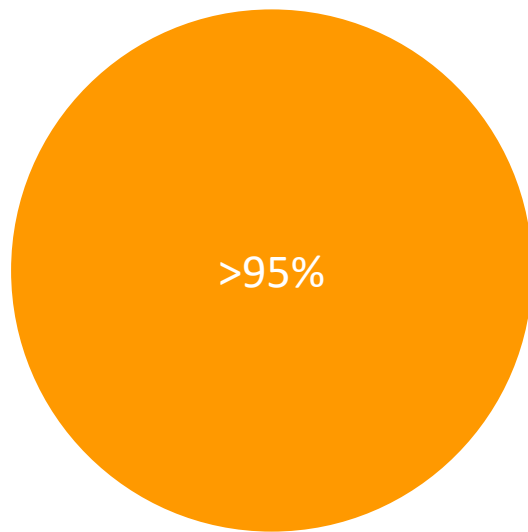
CONVENIENCE

DELIVERY /  
PICKUP OPTIONS

SAVES TIME

PREFER NOT TO  
SHOP IN-STORE

PREFER NOT TO  
SHOP WITH KIDS



*"It's just **hassle free** and I can just pick it up or I can ship it to my home."*

*"I can do curbside, so I can just run by there, they give it to me and then I can be on my way back home."*

*"I do not like to go in the store and get frozen items because if you walk around the store stuff starts melting or defrosting."*

*"As a mom of little ones, it's just really nice to not have to drive them to the grocery store."*



Size of bubble reflects magnitude.

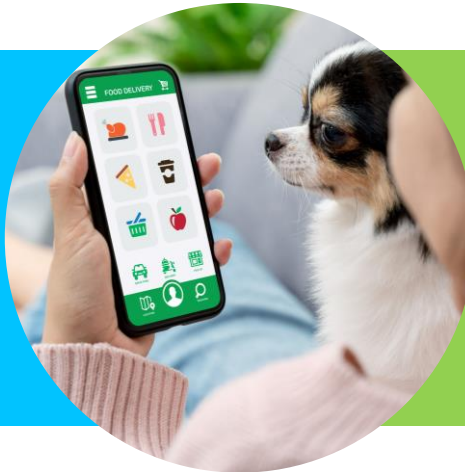




## WHERE TO WIN ONLINE

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Where is it most important to “win” Online?



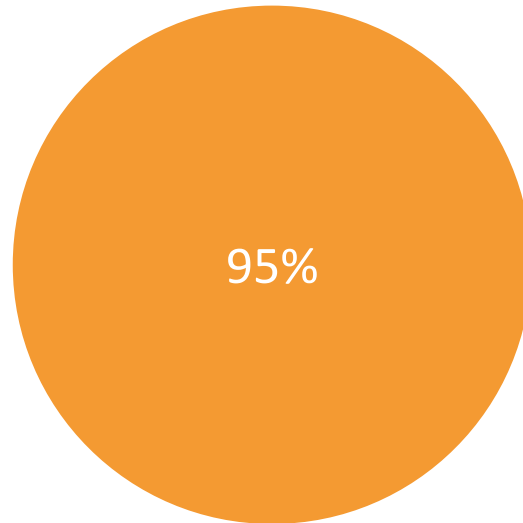
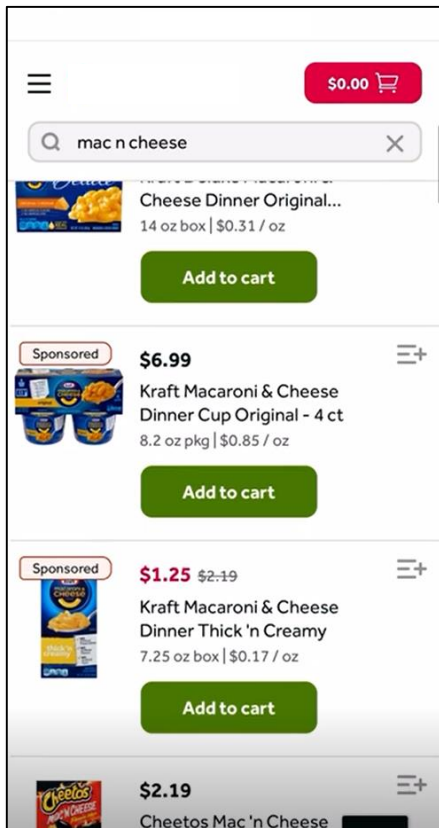
The **Search Results page** is critical to success in driving eCommerce performance; while most shoppers are satisfied with overall Shopability there is **opportunity to improve organization perceptions.**



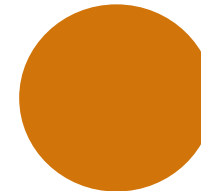
To locate items of interest, shoppers across all retailers and Clusters rely on Search Navigation, highlighting the need for accurate and relevant search results.

## NAVIGATIONAL TOOLS USED

### Search Navigation

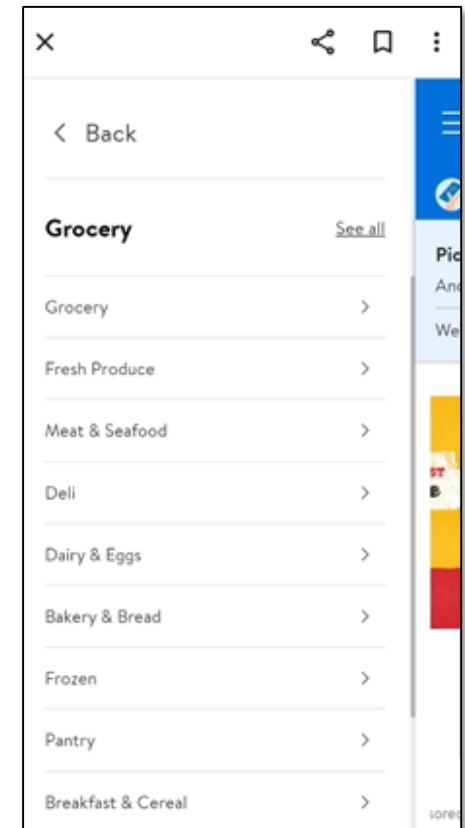


Use Search Navigation



Use Click Navigation

### Click Navigation



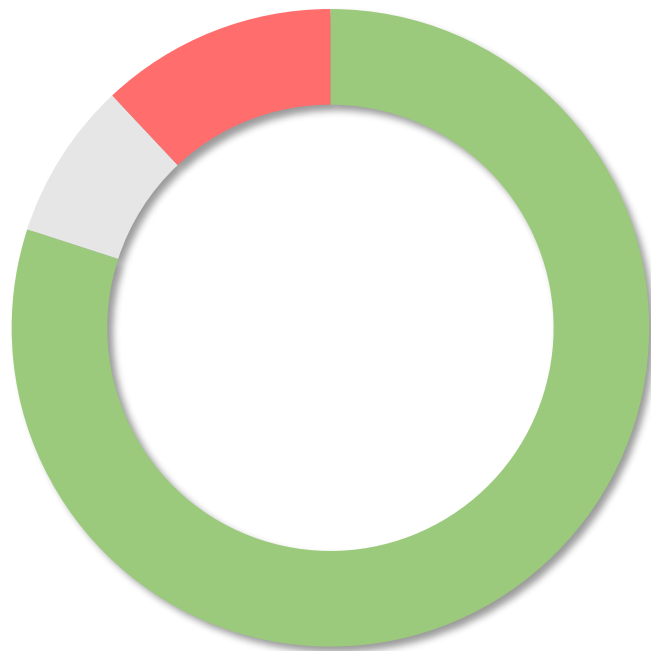
Size of bubble reflects magnitude.



8 in 10 feel satisfied with the Shopability of their eTailer. Shoppers can typically find the products they want but Organization perceptions is an opportunity for improvement – driven by irrelevant search results.

## TOTAL SHOPABILITY

### OVERALL SHOPABILITY



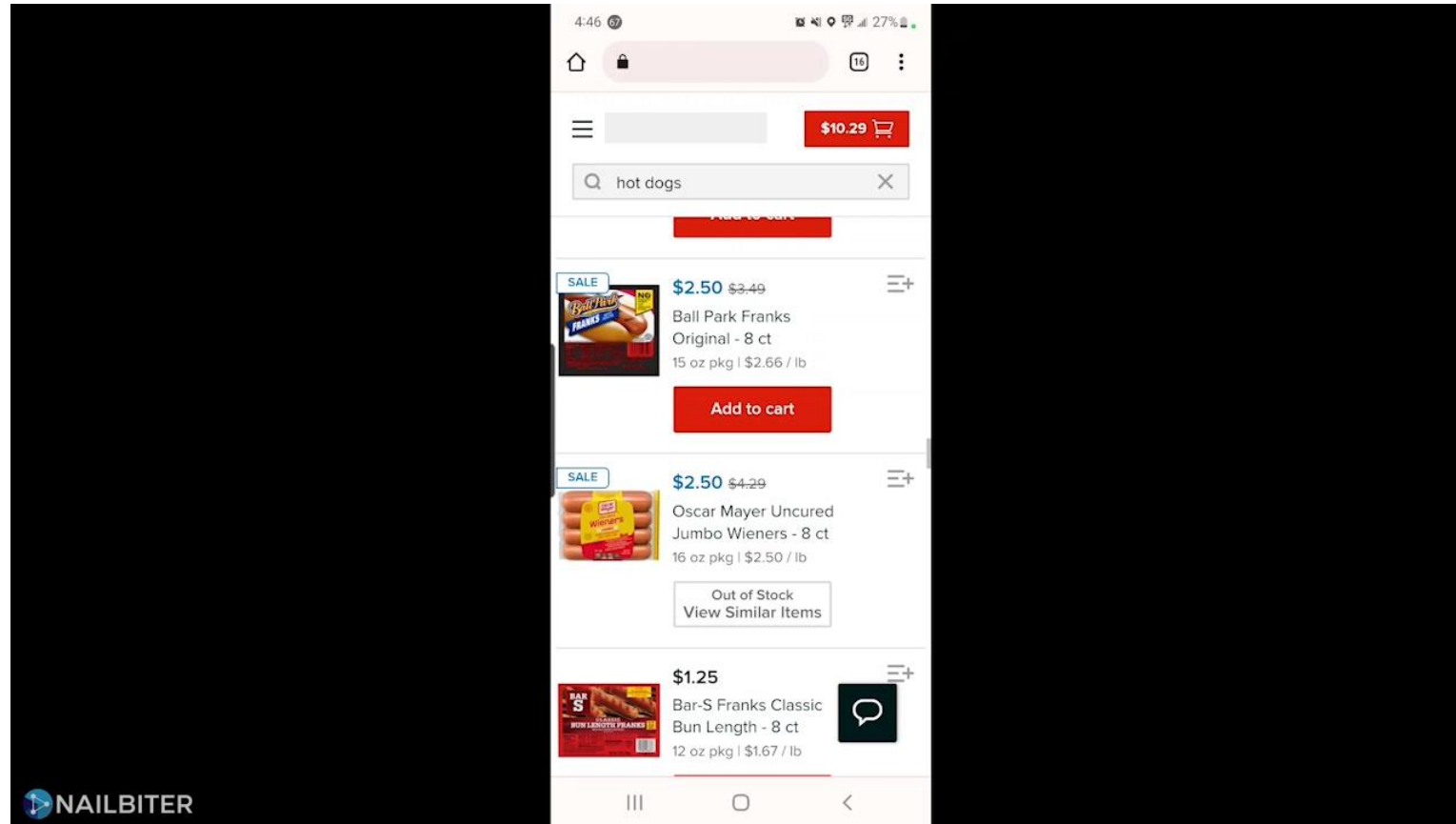
### SHOPABILITY FACTORS

■ Negative ■ Neutral ■ Positive





# FROM THE SHOPPER: SHOPABILITY OPPORTUNITIES





## WHERE TO WIN ONLINE

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What drives Basket Size?



Average number of products  
Carted increases when shoppers  
**Cart from the Search Page**  
compared to the Product Pages.



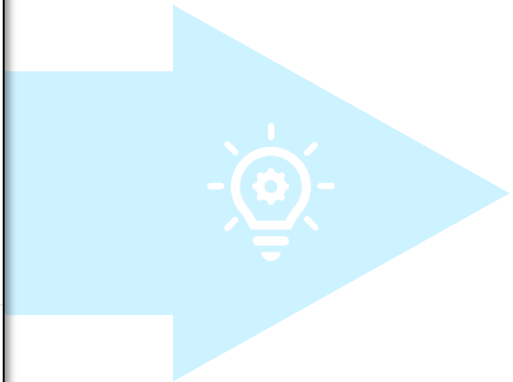
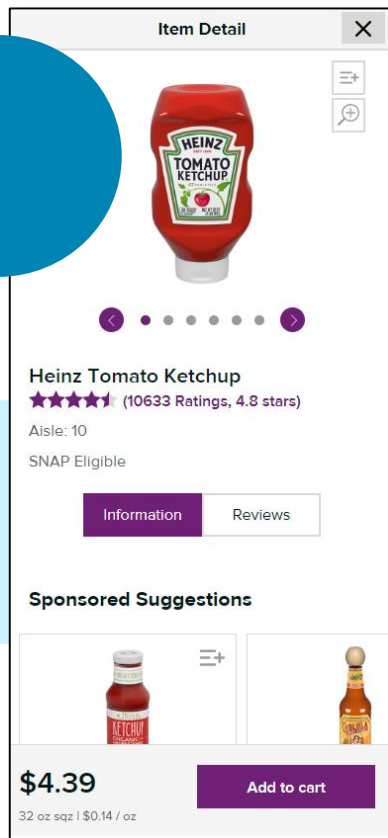
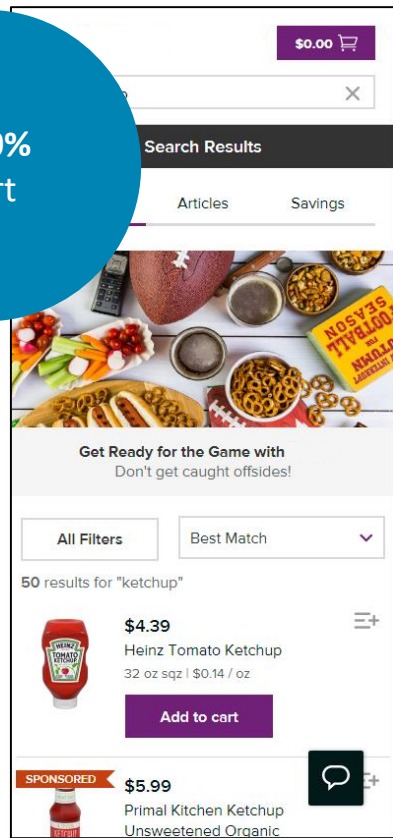
Both Search and Product pages are important to the shoppers' journey though there is greater opportunity to improve the Search Page to drive additional purchases.

## PAGE CARTED FROM

SEARCH PAGE

PRODUCT PAGE

> 50%  
Cart

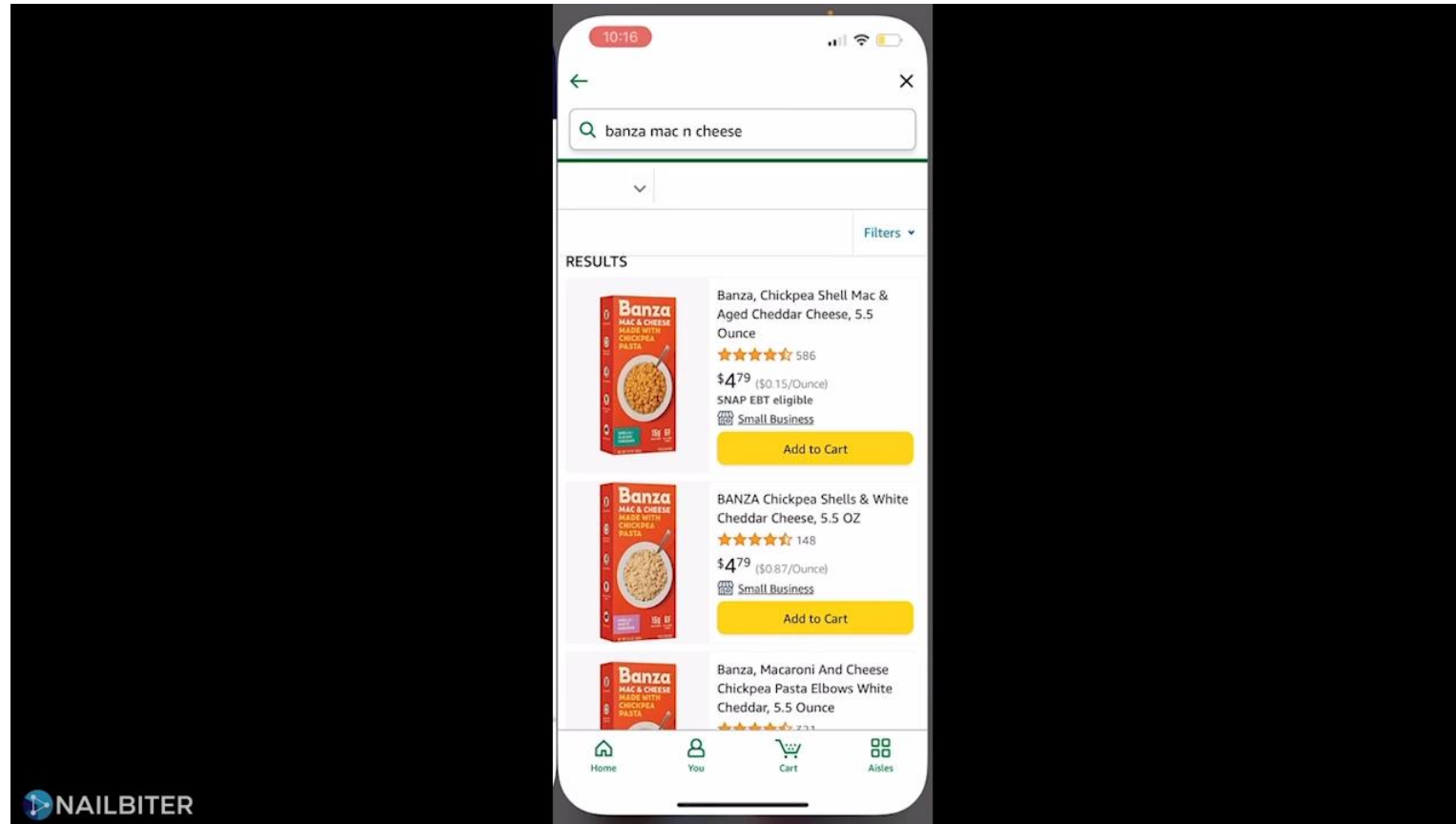


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Carted increases when shoppers  
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Size of bubble reflects magnitude.






## FROM THE SHOPPER: CARTING FROM THE SEARCH PAGE





## QUESTIONS DECODED

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01	Why do people shop Online?	For the <b>benefit of convenience.</b>	
02	Where is it most important to “win” Online?	The Search Results page is key.	
03	What drives Basket Size?	Making it easy for shoppers to <b>Cart from the Search Page.</b>	



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