

↑ Shift

The next consumer shift

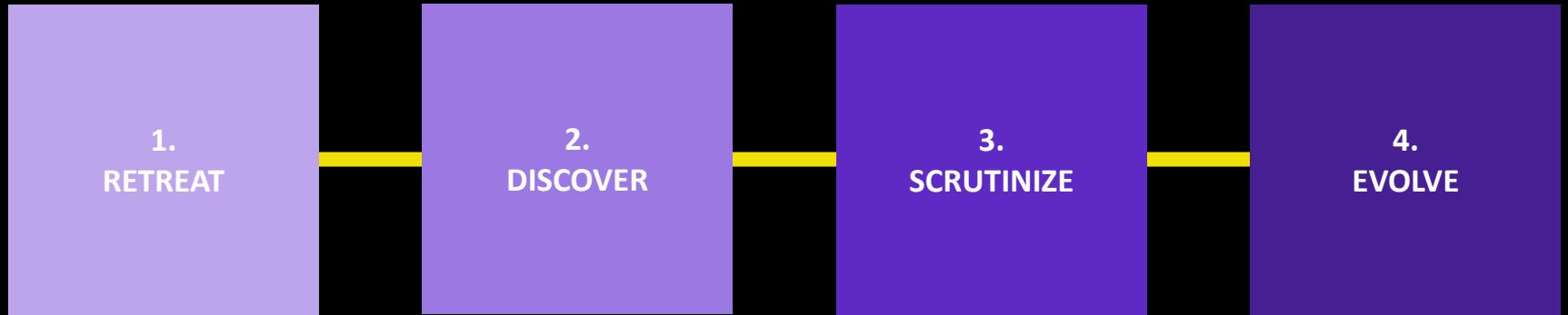




Makeup -25%
Fragrances -25%
Gum & Candy -33%

Vitamins +50%
Cleaners +40%
Coffee +30%

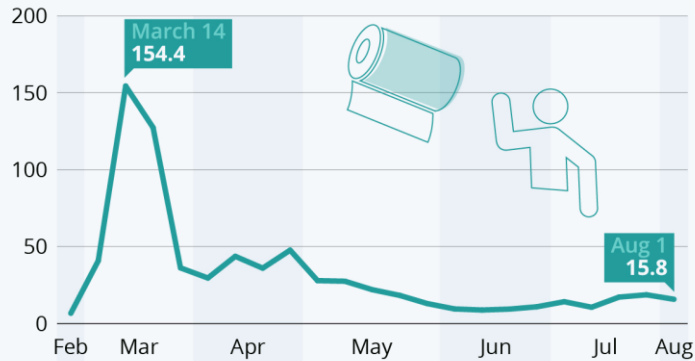
4 stages of consumer behavior change:



1. RETREAT

The Great Paper Towel Rush Has Calmed

Percent growth in U.S. paper towel sales in 2020 vs. same week in 2019



E-commerce sales not included.
Sources: Nielsen, Wall Street Journal



How much toilet paper?

The simple calculator for how much toilet paper you need to survive the pandemic

You will last 53 days

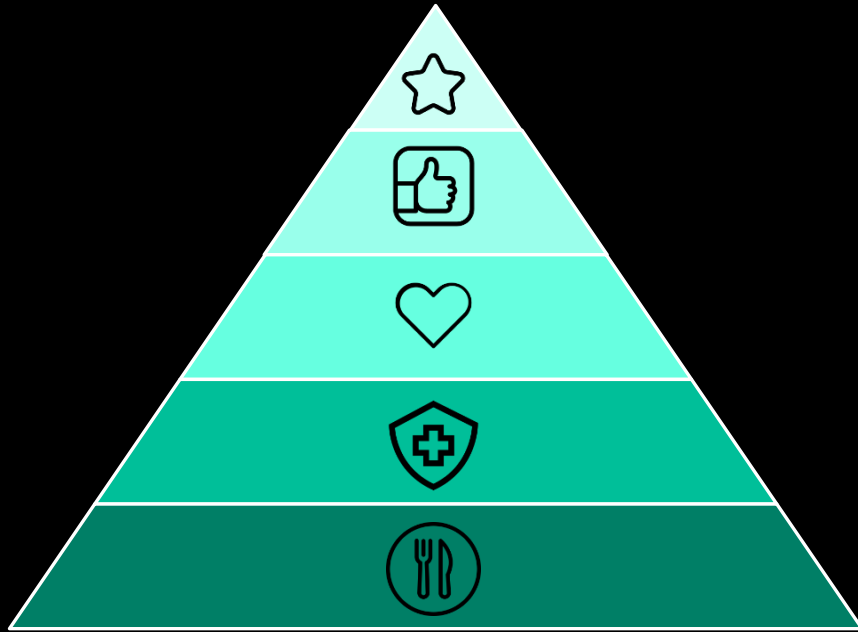
or 379% of your quarantine

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1. RETREAT



Hold onto your heritage, remember what functional *and* emotional needs you address and tap into them to leverage your strengths.

2. DISCOVER

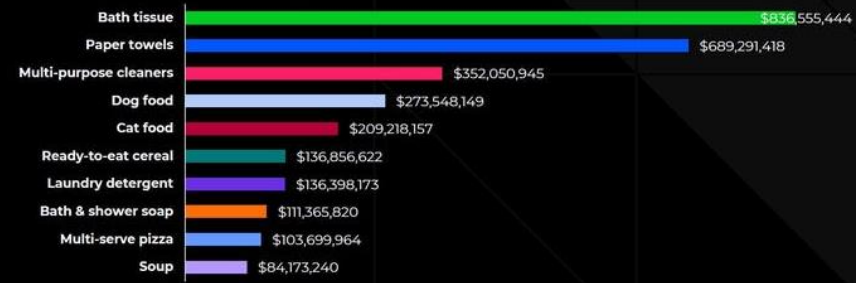
75% of American shoppers
have altered their brand
preference amid the rapid
changes in the world

Source: McKinsey

Project Title

One year after the pandemic: Missed sales continue due to out of stocks in U.S. supermarkets May 2020 through February 2021

Top 10 categories with highest missed value sales



Source: NielsenIQ On Shelf Availability (OSA) Barometer, based on a subset of U.S. retailers and categories, including household care, health & beauty, pet food, and selected grocery.



Recognize and adapt quickly to meet the changing consumer context - addressing emerging needs, transformed occasions and captive audiences.

3.
SCRUTINIZE

64% of Consumers
Consider Making an
Immediate Purchase After
Seeing Diverse
Advertisements, New
Data Shows

Source: Nov. 11, 2020 /PRNewswire

“People will be living and looking in recession times to brands for their value but also for their values. It’s this dual nature of value that has become more prominent.”

– Conny Bramms, Chief Digital and Marketing Officer,
Unilever, Dec 2020



Know what you stand for and be prepared to stand up for it. Don’t be afraid to use your voice when it counts.

4. EVOLVE

Restaurant curbside pick-up:

30% penetration
50% intend to continue post-COVID.

Digital health and wellness tools:

>10% penetration
70-80% intend to continue post-COVID

Source: Statista

U.S. Services Spending Climbs to Pre-Pandemic Level

Change in personal consumption expenditures on goods and services in the U.S. since January 2020*



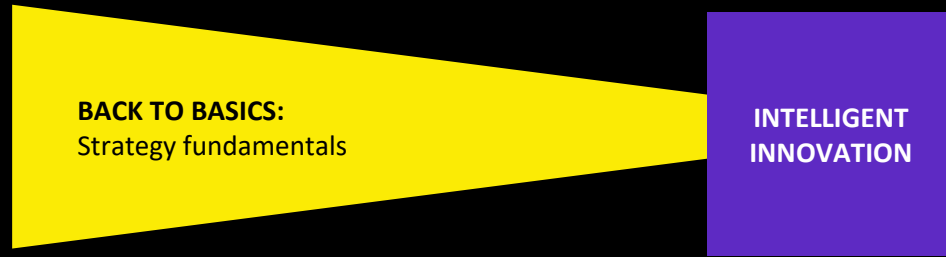
Stay ahead by innovating the brand experience – add value, be useful and look to meet consumers where they're going next.

Whether it's really possible to stay ahead of behavioral change

“Yes and no. We don't have a crystal ball, and there are multiple variables that can make our world and behavior pivot. However, we can anticipate what could happen through ideating on the most likely outcomes and preparing ‘what if’ scenarios based on what we know about shopper reactions...we [also] need to identify beacons along the way that indicate what scenario is playing out.”

- Yelena Idelchik, Category Management and Shopper Insights Director of Hygiene US at Reckitt

The need for intelligent innovation.



- **Know how and why you're useful:** and explore new ways to deliver that utility
- **Demonstrate value through the experience:** connecting the what and the why
- **Look outside the comfort zone:** assessing the potential of new out-of-home occasions

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- **Look ahead of the curve:** map and prioritize forces of chaos and invest in disruption early
- **Adapt and flow with the data:** have a living, evolving view of your brand and consumer
- **Get out in front where and when it counts:** map the future consumer journeys and identify short and long-term opportunities to add value

So, what's next?

**THERE IS NO NEW NORMAL.
THE ONLY CONSTANT IS CHANGE.**

CLEAR

M&CSAATCHI