NIQ Shopper Trends

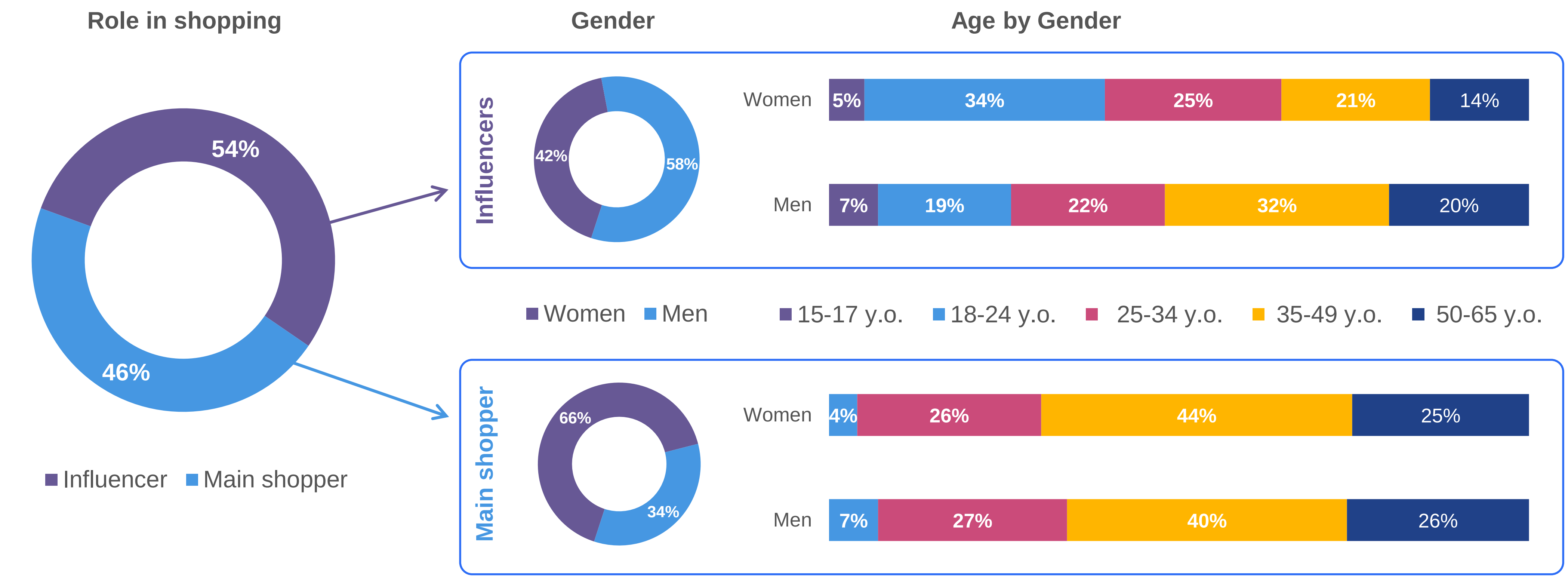
Example from our comprehensive off-the-shelf report

Retailer Performance

Main shopper profile and loyalty by retailer

SH/HM shopper profile

While main shoppers of super/hypermarket are women skewed, men influence the decision making



Base: All SH Respondents (n=1596)
Ref: Q4.Please record your gender
Q5.Which age group from the list below do you belong to?
Q6. Thinking about household shopping which of these statements applies to you?

Base: All S/H Respondents (n=1000)

Profile of main shopper – by retailer

Slight differences seen in shopper profile at retailer level – Retailer B has more younger shoppers while Retailer D has an older profile. Retailer C & Retailer E are skewed towards single shoppers

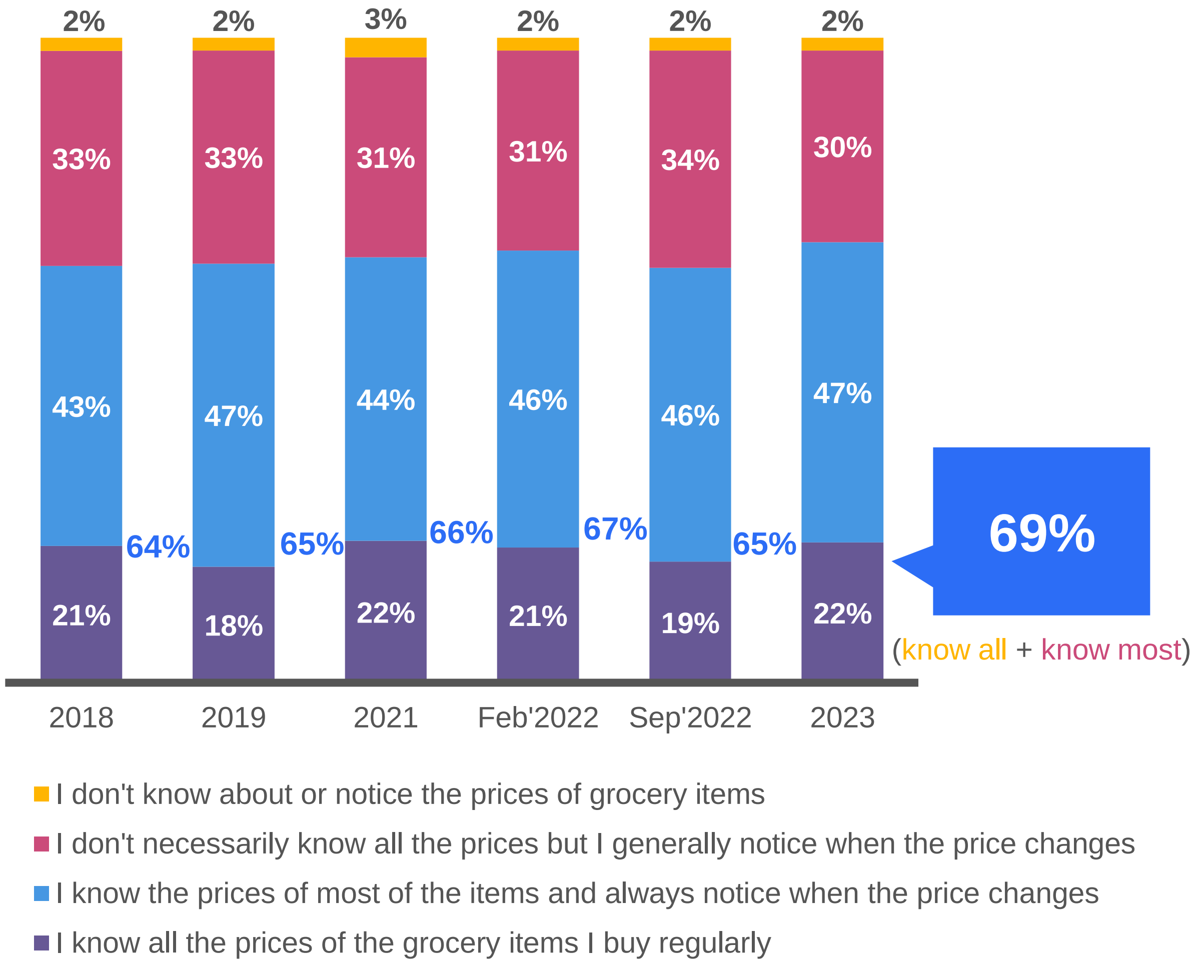
	Total	Retailer A	Retailer B	Retailer C	Retailer D	Retailer E	Retailer F
GENDER							
Men	47%	47%	52%	54%	50%	50%	54%
Women	53%	53%	48%	46%	50%	50%	46%
AGE							
18-24 y.o.	20%	19%	27%	26%	14%	24%	18%
25-34 y.o.	25%	25%	30%	22%	24%	38%	28%
35-49 y.o.	34%	39%	31%	33%	33%	24%	37%
50-65 y.o.	21%	18%	12%	19%	29%	14%	17%
MARITAL STATUS							
Single	29%	29%	33%	41%	23%	52%	31%
Married	67%	64%	65%	55%	73%	47%	64%
Divorced/Separated	1%	3%	0%	3%	1%	0%	4%
Widowed/Widower	2%	2%	1%	1%	4%	0%	1%
HOUSEHOLD MEMBERS							
1	2%	3%	1%	3%	2%	1%	1%
2	7%	7%	4%	12%	11%	0%	7%
3	16%	17%	12%	13%	18%	19%	15%
4	26%	29%	33%	23%	24%	19%	32%
5 or more	49%	46%	52%	49%	45%	61%	45%

Base: All HM/SM shoppers who visit store most often. 2022 Retailer A (n=313), Retailer B (n=137), Retailer C (n=56), Retailer D (n=112), Retailer E (n=37*), Retailer F (n=45*)
Ref: Q4 Please record your gender ; Q5 Which age group from the list below do you belong to?, Q69 Marital status. Q75 How many people are there in your household including yourself?

Significantly higher/lower at 95% CI vs. previous year

Shopper price awareness

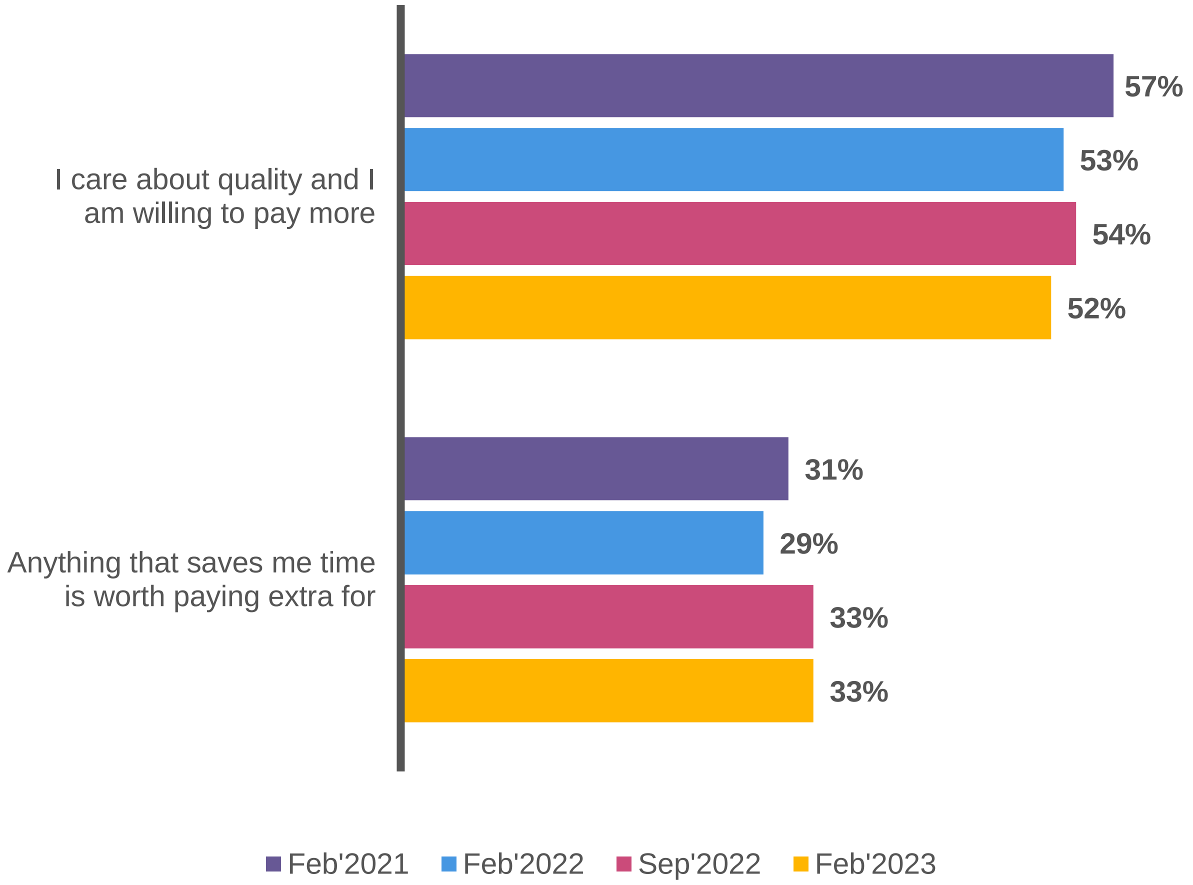
Price awareness of groceries bought regularly



Base: All HM/SM shoppers, 2018 (n=1388), 2019 (n=1411), 2021 (n=1305), Feb'2022 (n=1468), Sep'2022 (n=1011), 2023 (n=1466)
Ref: Q24 Which of the following best describes how well you know the prices of the grocery items you buy regularly?

Paying a premium: Quality vs. convenience

% of 'Strongly Agree / Agree'*



Base: All HM/SM shoppers, 2021 (n=1305), 2022 (n=1468), 2023 (n=1466
Ref: Q132. We have a few question about your attitudes towards grocery shopping. In general when shopping, to what extent do you disagree with the following statements?

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Channel Dynamics

Visitation to supermarkets and minimalists has gone up versus previous year

%	Supermarkets		Traditional Grocery/Provision Stores	
	2021	2022	2021	2022
Spend most in	38	41	5	6
Visited within P7D	42	46	40	47
Visited within P4W	58	67	49	59
Visit occasionally	66	78	62	73
Frequency of visiting	2.4 times a month	2.7 times a month	6.3 times a month	6.1 times a month

%	Hypermarkets		Minimarkets	
	2021	2022	2021	2022
Spend most in	39	33	10	11
Visited within P7D	44	36	31	44
Visited within P4W	56	54	44	56
Visit occasionally	66	68	52	64
Frequency of visiting	21. times a month	2.0 times a month	3.6 times a month	4.2 times a month

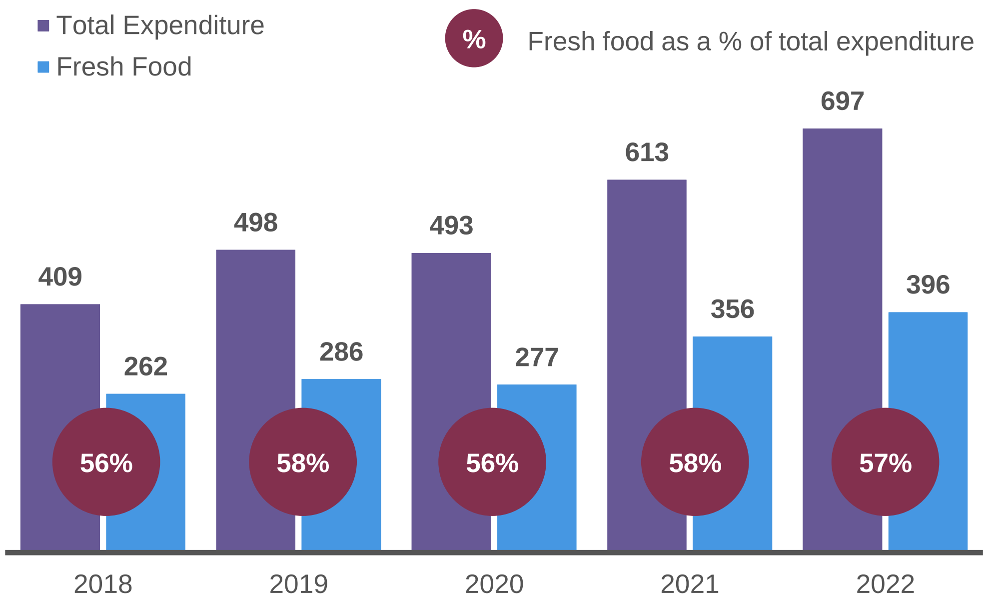
Base: All shoppers 2021 (n=2005), 2022 (n=1987)

Significantly higher/lower at 95% CI vs. previous year

Monthly grocery spend

With increased visitations expenditure on grocery essentials, especially fresh food, also increases though some of it could be driven by the rising prices

Average monthly grocery spend (MYR)



Base: All shoppers 2018 (n=1602), 2019 (n=1598, n=1601), 2021 (n=2004, n=2004), 2022 (n=1986, n=1986)
Ref: Q&s Please estimate how much your household would usually spend in a month on food, groceries, and personal care items.
Ref: Q&s Roughly how much is spent on Fresh Food – Meat, Fish and Vegetables etc.?

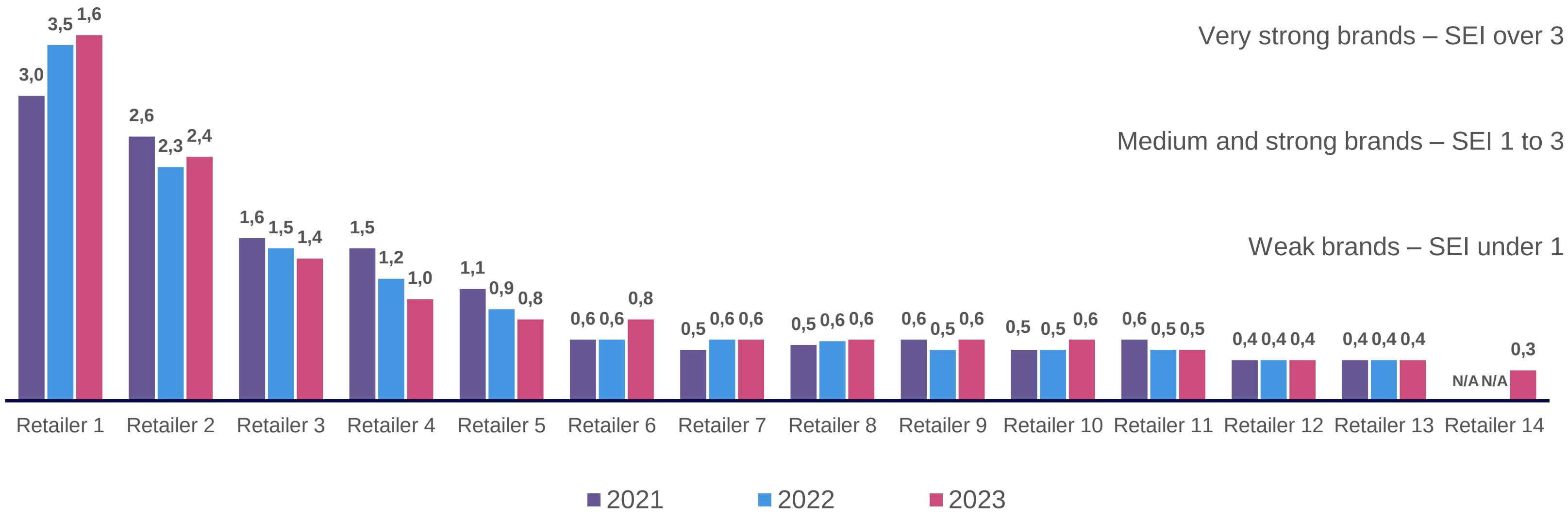
Retailer Performance

Learn which retailer has the strongest store equity

Competitor Benchmarking

Provides a unique measure of **Store Equity** based on NIQ's proprietary solution Winning Brands™. The index measure enables your business to understand the strength of your retailer brand against competing banners and track performance over time. Retailers that grow their Store Equity increase their chances to win the battle for loyal shoppers, vital in today's retail landscape online and in-store.

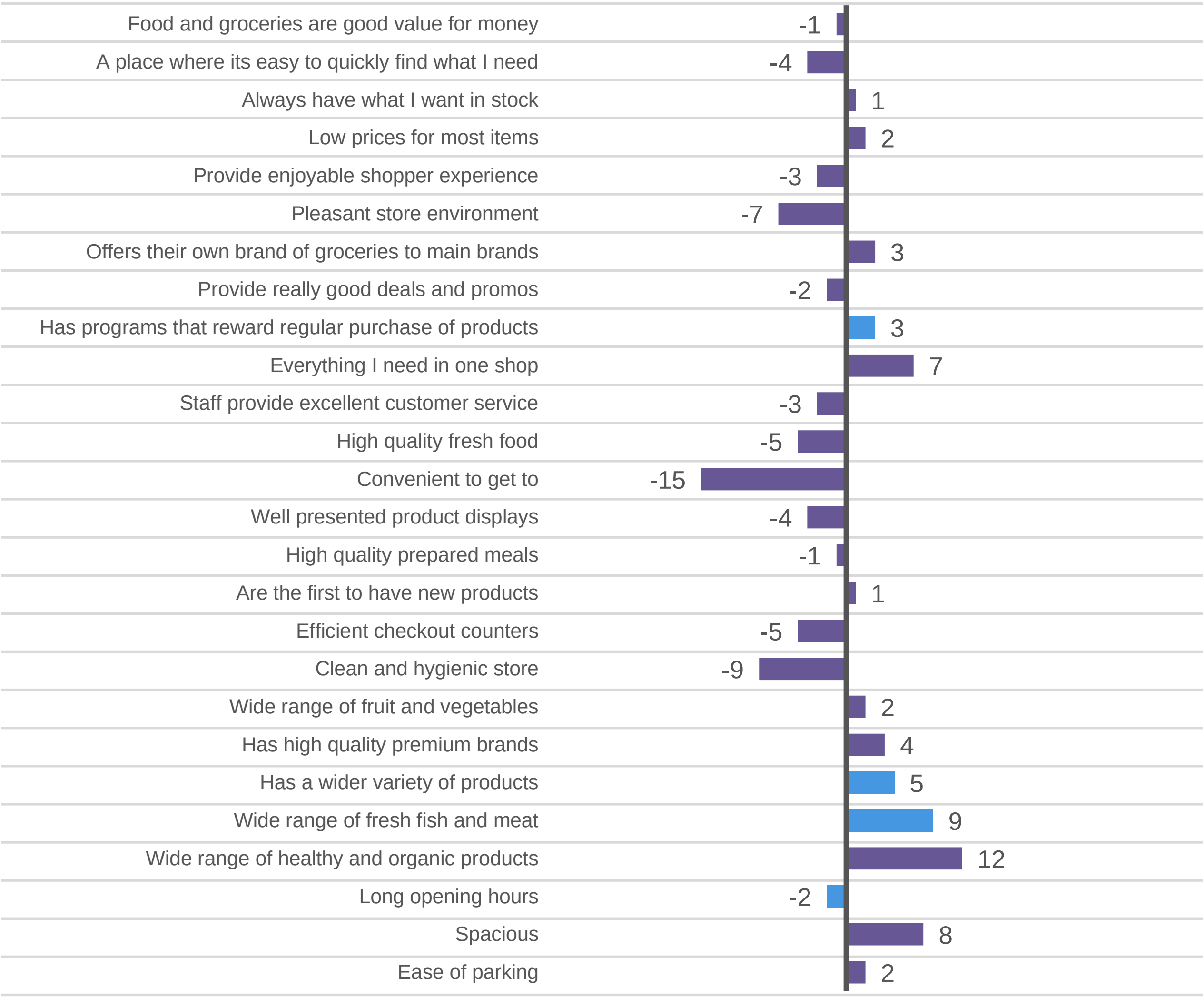
Store equity index (SEI)



Store Equity Index is calculated from preferred recommendation, willingness to pay price premium, willingness to travel

Based All HM/SM shoppers 2022 (n=1468), 2023 (n=1466)

Strengths and weaknesses (uniqueness)



Retailer B

Key strengths
- Wide range of healthy and organic products
- Wide range of fresh fish and meat spacious
- Everything I need in one shop

Key weaknesses
- Convenient to get to
- Clean and hygienic store
- Pleasant store environment

"**Data normalization** – Statistical methos which allow to derive differences between market players and allow to identify key strengths and weaknesses among competitors. It doesn't show performance – only differentiation/associations, bigger difference – stronger uniqueness from others.

Based All HM/SM shoppers 2023 who rate Retailer B (n=569); Ref: Q18. Thinking about the same statements, please indicate which stores you associate with each of the statements?

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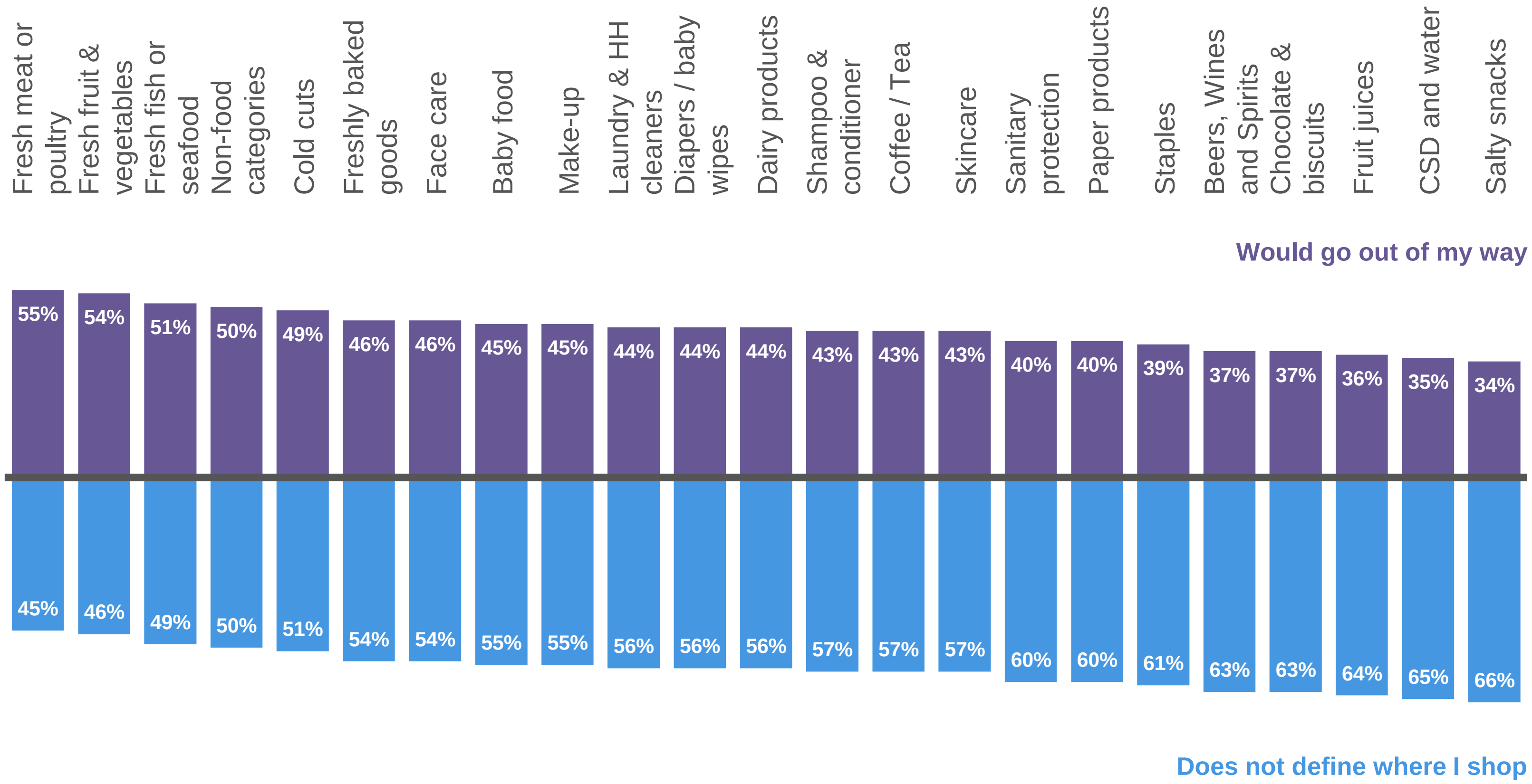
Category-level insights

How important is your category?

Shopper Trends also has Category Insights for the top categories shopped within the store. It offers an understanding of the categories which are part of the shopper basket in the last trip as well as those which trigger the trip. This will enable manufacturers to get an insight into key areas like shopper price awareness across different categories, promotion sensitivity or the importance of the introduction of new brands, products or varieties.

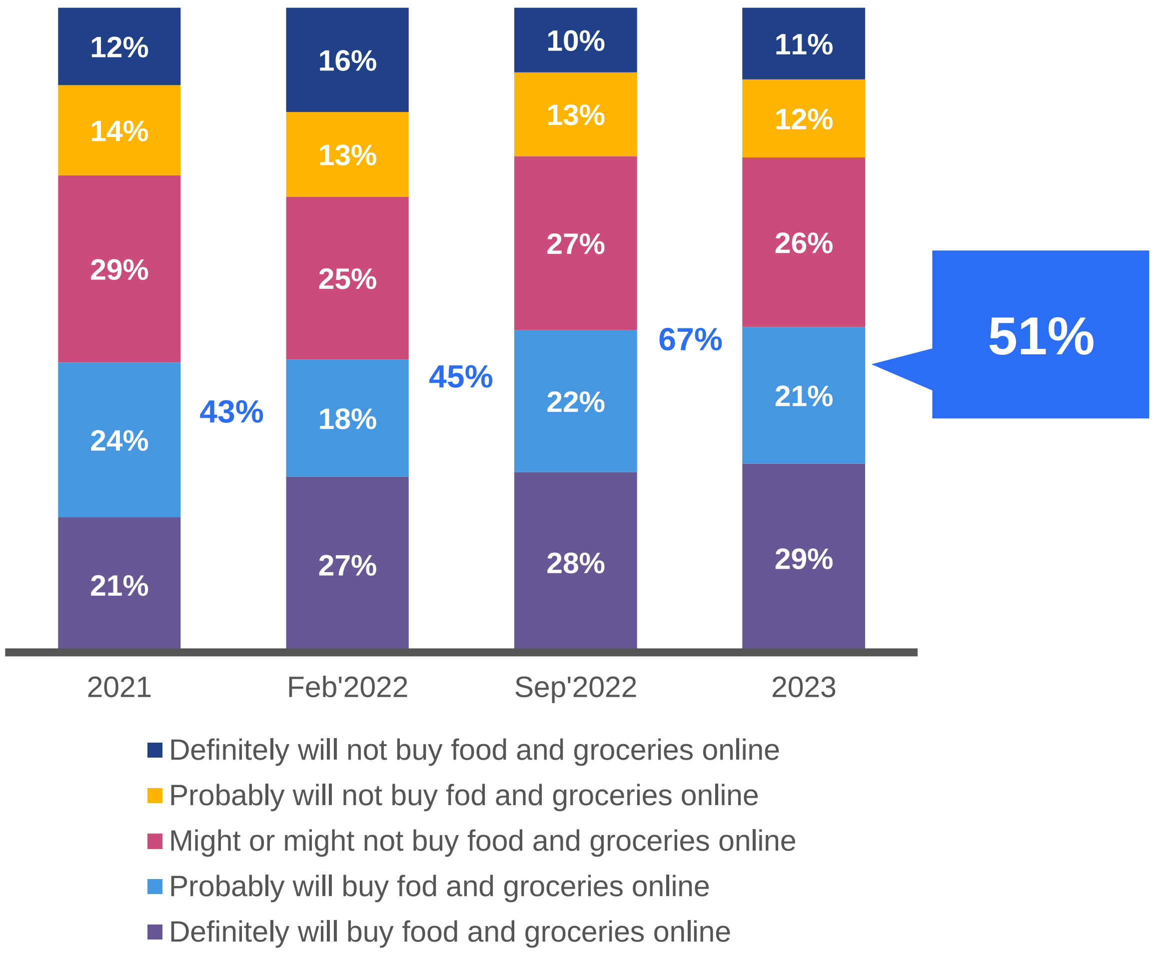
Category influence on store selection (%)



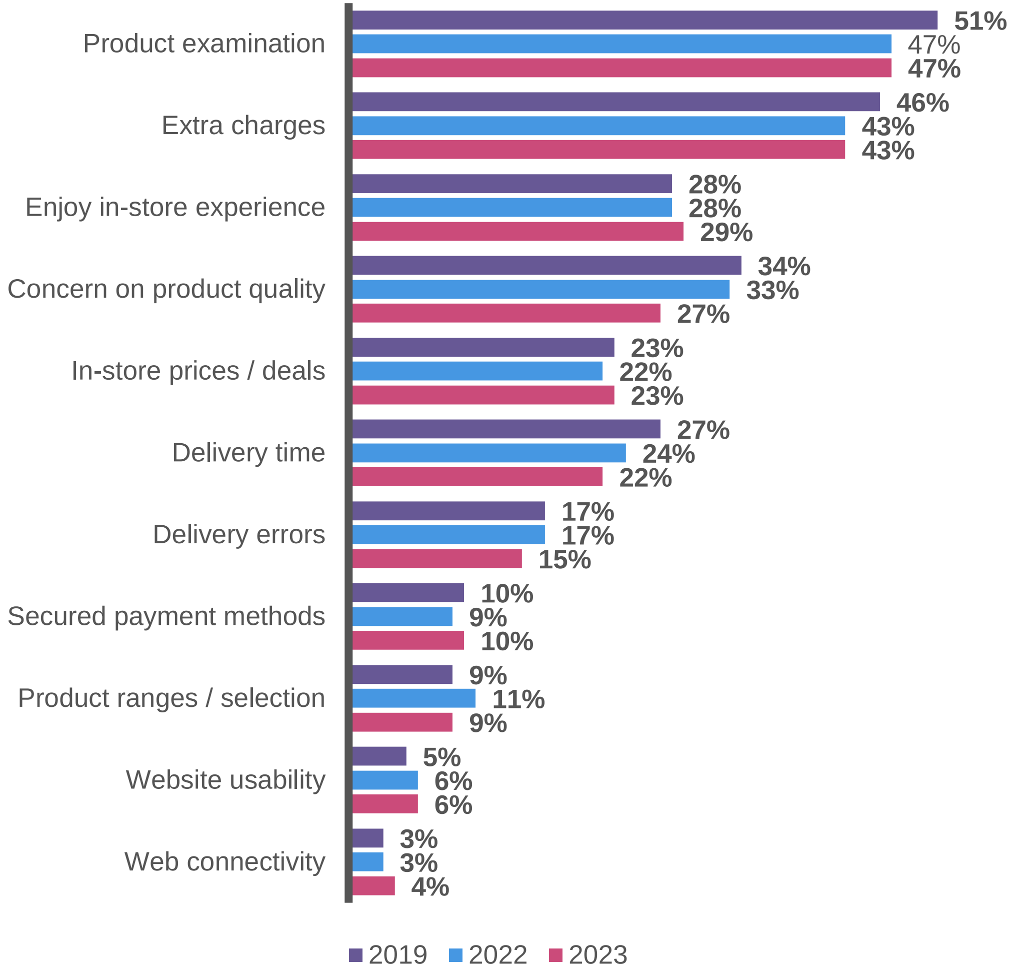
Based: HM/SM shopper, Category buyers 2023 (n=1450)
Ref: QQ168. Please indicate the extent to which each of the following categories influences the store you choose to shop at?

Omni-Channel behavior:

Online grocery purchase intention in next 6M



Barriers to buying groceries online



Base: All HM/SM shoppers, 2021 (n=1305), 2022 (n=1468), Sep'2022 (n=1011), 2023 (n=1466), Ref.: QQ165. Considering the next 6 months, how likely are you to buy food groceries online?
Base: SM/HM shoppers not intending to buy groceries online in next 6 months Feb'2022 n=722). Ref.: Q136. Which of the following factors prevents you from buying groceries online?

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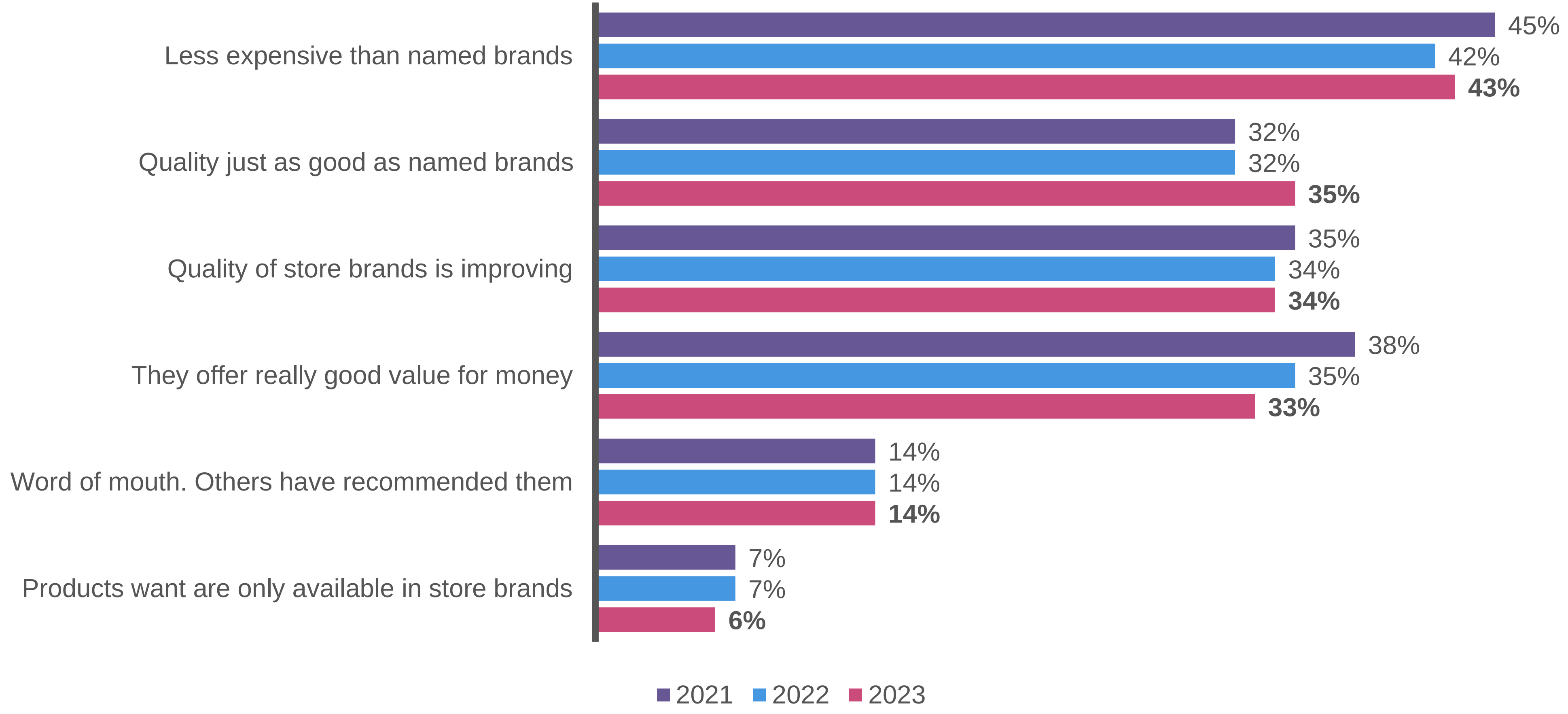
Private Label Insights

Being less expensive than named brands is still the main driver behind buying private labels

Drivers behind buying private label

% of ‘Strongly Agree / Agree’*



Base: All aware of Private Label 2021 (n=1251, 2022 (n=1371), 2023 (n=1466)
Ref.: Q115. Why do you buy store brands?

Thank you.