## 1 COVD-19 A NEW NORMAL FOR AFRICAN AMERICANS data through time period 20 weeks ending July 11, 2020

## **DEFINING LIVING A NEW NORMAL**

Consumer behavior shifts: People return to daily routines (work, school, etc.) but operate with a renewed cautiousness about health. Permanent shifts in supply chain, the use of e-commerce and hygiene practices.

COVID-19 event markers: guarantines lift beyond the region/country's most-affected hotspots, life starts to return to normal.

CONSUMER TRENDS	•	% CHG PURCHASE SI TOTAL PANEL	ZE % CHG PURCHASE African America	
nore significant spend	Total Outlets		100/	11 //
ncrease in	Grocery	17%	19%	114
onvenience/Gas	. Mass Merch W/Supers	20%	21%	106
Drug spend vs Total Pane	· ·	15%	17%	108
the latest 20 weeks	Dollal	13%	7%	53
	Drug	16%	20%	123
\$	Warehouse Club	11%	11%	105
	Convenience/Gas	18%	28%	152
			INDEX = AA % CHG LAST 20 WK	S VS 20 WKS YA / TOTAL PANEL
BRICK & MORTAR UP	African American Total Outlet g	rowth	E-COMMERCE UP	
	driven by Grocery, Club, and			
	Convenience. Increase in \$ spe		6% of CPG online	•
	of trips vs. same time period a	year ago. bi	uyers are African	
			merican, up from	· ·
OTAL OUTLETS	5%		· •	
	19%	1.	3% YAGO	
rips and Spend	100/			
ROCERY	12%	<b>6</b> s	Cource: Nielsen E-commerce measuren	nent powered by Rakuten Intelligence 52 we
rips and Spend		E	Ending April 2020 vs YA	. ,
LUB	11%			
rips and Spend			BEAUTY SPOTLIGHT	
CONVENIENCE/GAS	-3%	28%		
rips and Spend		20 %		
	% CHG LAS	ST 20 WKS	<b></b>	00/
CATEGORY IMPACTS			3	8%
CATEGORY IMPACTS OUTPACING vs. SAME TIM	IE PERIOD	/1H	ncrease in E-C	commerce Health
OUTPACING vs. SAME TIM LAST Y	E PERIOD GROW EAR DRIVE	/1H	ncrease in E-C & Beauty ord	commerce Health
OUTPACING vs. SAME TIM LAST Y HOUSEHOL	IE PERIOD GROW EAR DRIVE	RS	ncrease in E-C & Beauty ord	commerce Healtl ers vs YAGO for
OUTPACING vs. SAME TIM LAST Y HOUSEHOL 26%	IE PERIOD EAR DRIVE	FECTANTS, PAPER,	ncrease in E-C & Beauty ord	commerce Healtl ers vs YAGO for
OUTPACING vs. SAME TIM LAST Y HOUSEHOL	IE PERIOD EAR DRIVE	FECTANTS, PAPER, CLEANERS	ncrease in E-C & Beauty ord Black c	Commerce Healtl ers vs YAGO for consumers
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OUTPACING vs. SAME TIM LAST Y HOUSEHOL 26%   4 99   1 HEALTH & I 10%   4 156   1	IE PERIOD EAR     GROW DRIVE       .D CARE     AEROSOL DISIN PARCHMENT       4%     PARCHMENT       27     MULTIPURPOSE       BEAUTY     MEDICAL MASE       4%     SANITIZ       199     THERMOME	I H RS FECTANTS, PAPER, CLEANERS KS, HAND ER, Hai ETERS	ncrease in E-C & Beauty ord Black c African American are dr cat r Treatment r Accessories	Commerce Health ers vs YAGO for consumers riving growth for DIY Beau tegories
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OUTPACING vs. SAME TIM LAST Y HOUSEHOL 26%   4 99   1 HEALTH & I 10%   4 156   1	IE PERIOD EAR DRIVE D CARE 4% PARCHMENT 27 MULTIPURPOSE BEAUTY 4% SANITIZ 199 CALZONE/STR 1% CALZONE/STR	I H RS FECTANTS, PAPER, CLEANERS KS, HAND ER, Hai ETERS Hai ROMBOLI, Hai	ncrease in E-C & Beauty ord Black c African American are du cat r Treatment r Accessories	commerce Health ers vs YAGO for consumers riving growth for DIY Beau regories 24.0
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OUTPACING vs. SAME TIM LAST Y           HOUSEHOL           26%   4           99   1           HEALTH & I           10%   4           156   1           33%   1           105   1	IE PERIOD EAR     GROW DRIVE       D CARE 4%     AEROSOL DISIN PARCHMENT MULTIPURPOSE       BEAUTY 4%     MEDICAL MASI SANITIZ THERMOME       199     THERMOME       EN 1%     CALZONE/STR CRAB, SCA	I H RS FECTANTS, PAPER, CLEANERS KS, HAND ER, ETERS Hai ROMBOLI, LLOPS Nai	ncrease in E-C & Beauty ord Black c African American are dr cat r Treatment r Accessories r Cair I Treatments	Commerce Health ers vs YAGO for consumers riving growth for DIY Beau tegories 24.0 3.8 24.0 37.9 49.4 37.9
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OUTPACING vs. SAME TIM LAST Y         HOUSEHOL 26%   4         26%   4         99   1         HEALTH & I 10%   4         156   1         Sign (1)         FROZI 33%   1         33%   1         105   1	IE PERIOD EAR DRIVE DCARE AEROSOL DISIN PARCHMENT 27 MULTIPURPOSE BEAUTY MEDICAL MAS SANITIZ 39 THERMOME EN CALZONE/STR CRAB, SCA ERY YEAST, GARLIC POWDE	FECTANTS, PAPER, CLEANERS KS, HAND ER, ETERS Hai ROMBOLI, LLOPS Nai C, BAKING ER	ncrease in E-C & Beauty ord Black c African American are dr cat r Treatment r Accessories r Cair I Treatments	Commerce Health ers vs YAGO for consumers riving growth for DIY Beau tegories 24.0 3.8 24.0 37.9 49.4 37.9
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OUTPACING vs. SAME TIM LAST Y         HOUSEHOL 26%   4         26%   4         99   1         HEALTH & I         10%   4         156   1         FROZI         33%   1         105   1         GROCE         21%   1	IE PERIOD       GROW         EAR       DRIVE         JD CARE       AEROSOL DISIN         4%       PARCHMENT         27       MULTIPURPOSE         BEAUTY       MEDICAL MASI         4%       SANITIZ         199       THERMOME         1%       CALZONE/STR         1%       CRAB, SCAI         ERY       YEAST, GARLIC         2%       POWDE         % CHG LAST	/ I H         :RS         FECTANTS,         PAPER,         CLEANERS         KS, HAND         ER,         ETERS         Hai         ROMBOLI,         LLOPS         Nai         C, BAKING         R         Arti         20 WKS         Non African	African American are dr cat r Treatment r Cair I Treatments I Polish ficial Nails	Commerce Health ers vs YAGO for consumers riving growth for DIY Beau tegories 24.0 3.8 24.0 37.9 49.4 37.9 60.9
OUTPACING vs. SAME TIM LAST Y         HOUSEHOL 26%   4         26%   4         99   1         HEALTH & I         10%   4         156   1         Signal         Signal         GROCE         21%   3         99   1	IE PERIOD       GROW         EAR       DRIVE         JD CARE       AEROSOL DISIN         4%       PARCHMENT         27       MULTIPURPOSE         BEAUTY       MEDICAL MASI         4%       SANITIZ         199       THERMOME         EN       CALZONE/STR         1%       CRAB, SCAI         ERY       YEAST, GARLIC         2%       POWDE         00       % CHG LAST         11 LAST YEAR       % CHG LAST	/ I H         :RS         FECTANTS,         PAPER,         CLEANERS         KS, HAND         ER,         ETERS         Hai         ROMBOLI,         LLOPS         Nai         C, BAKING         R         Arti         20 WKS         Non African	African American are di cat r Treatment r Cair I Treatments I Polish ficial Nails	Commerce Health ers vs YAGO for consumers riving growth for DIY Beau tegories 24.0 3.8 24.0 37.9 49.4 37.9 60.9
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OUTPACING vs. SAME TIM LAST Y         HOUSEHOL 26%   4         26%   4         99   1         HEALTH & I 10%   4         156   1         Signal         FROZI 33%   1         33%   1         UTPACING 26%   4         PROZI 33%   1         Signal         GROCE 21%   1         99   1	IE PERIOD       GROW         EAR       DRIVE         JD CARE       AEROSOL DISIN         4%       PARCHMENT         27       MEDICAL MASE         8EAUTY       MEDICAL MASE         4%       SANITIZ         199       THERMOME         EN       CALZONE/STR         1%       CRAB, SCA         EN       CALZONE/STR         1%       CRAB, SCA         EN       VEAST, GARLIC         2%       POWDE         1/LAST YEAR       % CHG LAST         NDEL       NDEL	/ I H         :RS         FECTANTS,         PAPER,         CLEANERS         KS, HAND         ER,         ETERS         Hai         ROMBOLI,         LLOPS         Nai         C, BAKING         R         Arti         20 WKS         Non African	African American are dr african American are dr ar Treatment r Accessories r Cair I Treatments I Polish ficial Nails sial Skin Care	Commerce Health ers vs YAGO for onsumers riving growth for DIY Beau egories 24.0 3.8 24.0 3.9 49.4 37.9 49.4 37.9 60.9 50.6
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more significantly than **Private Label growth** 

BRAND <</ NAMES

Growth compared to same period 2019

Growth compared to same period 2019

LABEL

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