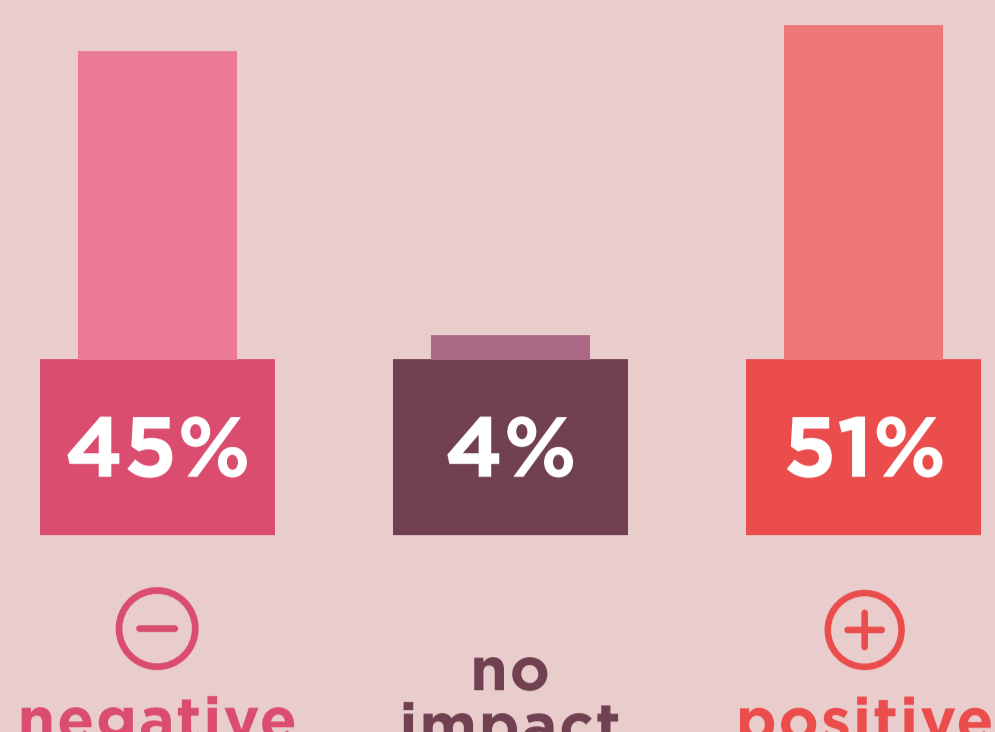


1. IMPACT OF THE COVID-19 CRISIS ON FMCG BRANDS

IMPACT ON SALES IN THE GROCERS (INCLUDING.COM) HAS BEEN VARIED



BUDGETS HAVE BEEN IMPACTED



CHANNELS WHERE BRANDS HAVE REPORTED A DECREASE OR STOP IN SPENDING

- 93% - In Store Sampling
- 90% - OOH Sampling
- 66% - POS
- 66% - OOH Media



CHANNELS WHERE BRANDS REPORT AN INCREASE OR START IN SPENDING

- 36% - Social media
- 31% - .com Retail Media
- 22% - Digital Display

**Percentage of brands who have used these channels either before or during the crisis*

THE BIGGEST REPORTED CHALLENGES FOR BRANDS DURING THE CRISIS

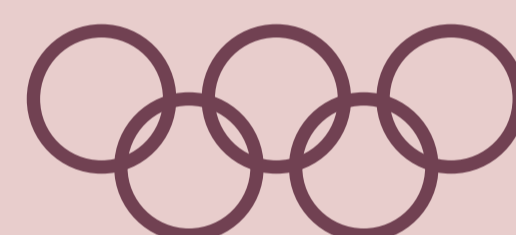


THE CRISIS HAS DISRUPTED NPD LAUNCH AND EVENT BUDGETS

72% have had NPD LAUNCH PLANS impacted. But only 13% of these have been put on hold altogether.

CONSISTENT REASONS WHY:

- 1- Retailer range reviews pushed back
- 2- Getting airtime with buyers is challenging
- 3- Factory constraints on producing NPD
- 4- Focus on core products, NDP has taken a backseat

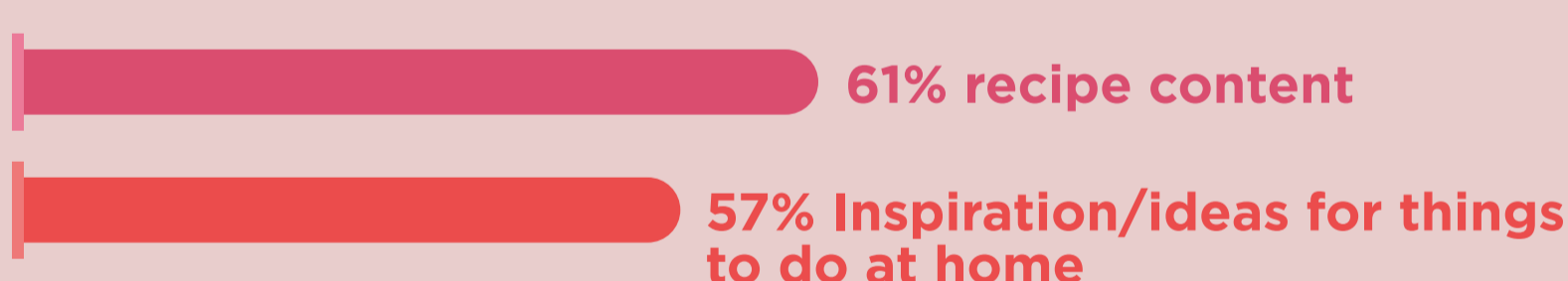


61% of marketing plans have been impacted by cancellation of major events

2. BRANDS HAVE ADAPTED THEIR MARKETING MESSAGES

2/3 of brands have changed their marketing messaging

Recipe and inspiration content have been used most



BRANDS HAVE PARTICIPATED IN CHARITY INITIATIVES



83% HAVE PARTICIPATED IN A CHARITY INITIATIVE, MAINLY BY DONATING PRODUCTS TO FOODBANKS AND KEY WORKERS



3. FMCGS ARE ADAPTING THEIR MARKETING PLANS FOR THE FUTURE:

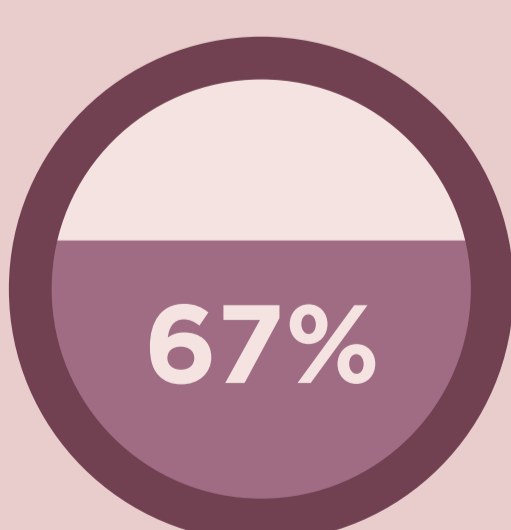


LONG TERM IMPACT ON SALES

42%

of brands anticipate a negative impact vs their plan for the rest of 2020

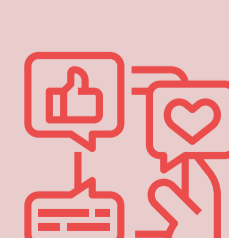
SHIFT TO DIGITAL ADVERTISING TO SUPPORT ECOMMERCE



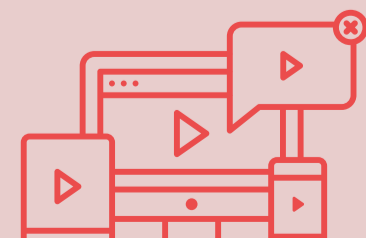
AREAS OF INCREASED SPENDING



CHANNELS BRANDS PLAN TO USE MORE IN THE SECOND HALF OF 2020



84% SOCIAL MEDIA



33% DIGITAL DISPLAY



64% .com retail media



48% Digital media with measurable sales



39% In store promotions



36% Mobile promotion platforms