

An Orientation on

Retail Pulse 2026

(previously SHOPPER TRENDS)

Prepared by

NIQ Strategic Analytics & Insights

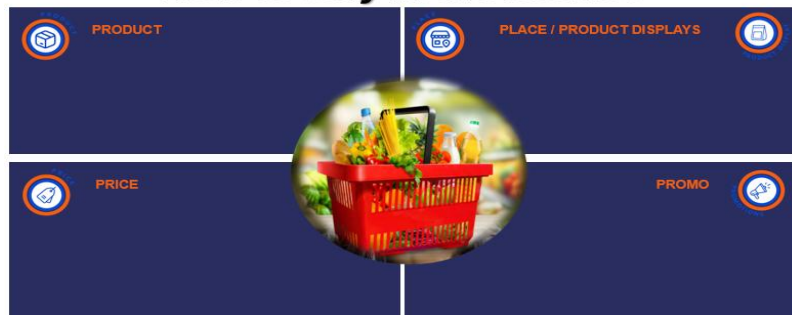


What is ***Retail Pulse 2026*** ?

- Serves as a *common* reference/guide between FMCG manufacturers and retail channel retailers to better craft data-driven marketing strategies by understanding their shoppers
- Provides insights on *where*, *when*, and *how often* people shop, their shop missions, choice considerations, affinities and perceptions about key **retailers**



How to stay in the basket



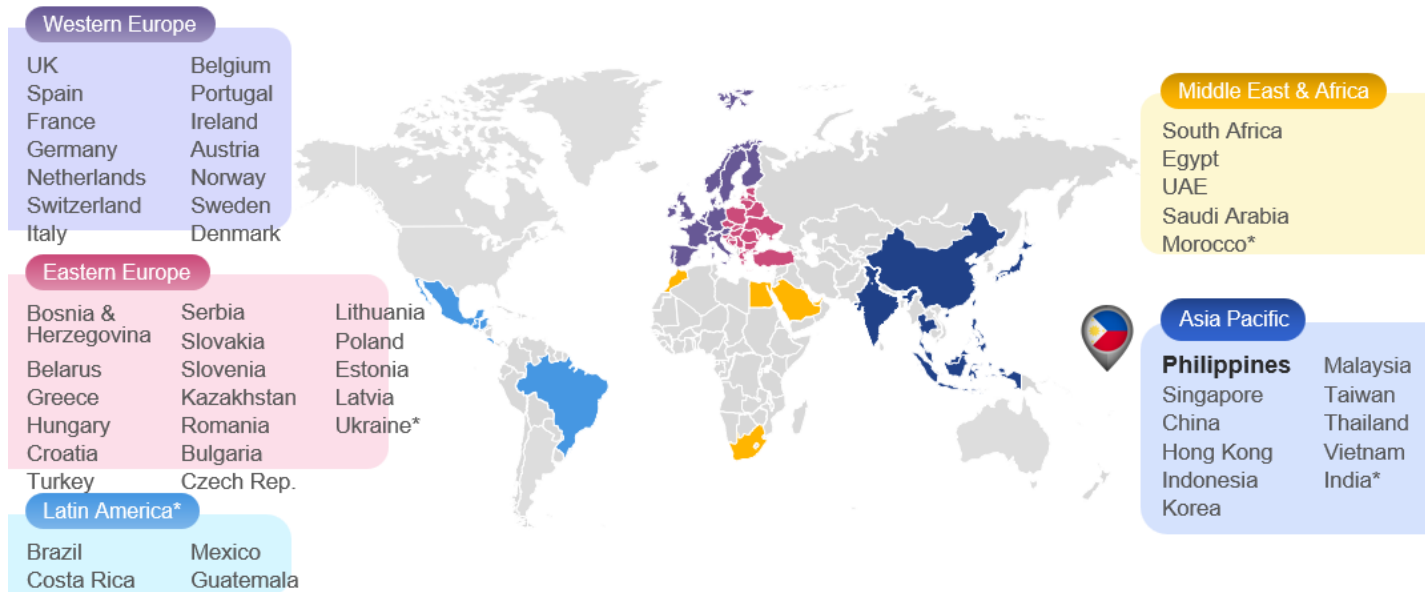
Understand the evolving retail landscape and your retail store performance to drive retention and conversion



Retail Pulse

What is **Retail Pulse 2026** ?

- A **syndicated** study done annually in over 50 + markets to understand shopping behavior & sentiments in the different retail channel landscape



Retail Pulse 2026



Overall objectives:



Assess impact of the **Philippines' economic, retail, & other major developments** on recent shopping behavior



Review the **drivers of retailer patronage and brand performances in terms of store equity**



Compare **similarities or differences** in shopping behavior **versus the previous periods**
[3 years data trended]



Study Specifications



QUANTITATIVE PHASE

Urban Locations Nationwide

Males and females aged 15-65
From ABCDE SEC

Main decision-maker or key influencers
on where to shop



Door-to-door, **face to face interviews** using a
structured questionnaire

Shoppers in select retail channels

- * **Supermarket/Hypermarkets**
- * Convenience Stores
(Includes Petrol-based CVs, Modern Proximity/Grocery/Discounters)
- * Drugstores/Pharmacies
- * Sari-sari Stores

Fieldwork: Q4 2025



QUALITATIVE SUPPLEMENT

Metro Manila and laidback
urban areas in VisMin (Iloilo, CDO)

6 Mini Focus Groups	SEC ABC1	3
	C2D	3

Mix of young, adults / older adults

Multi-channel shoppers (shopped in at
least 2 channel types in the past month)

Information List: CORE

Cost-efficient means to obtain shopping fundamentals per retail channel type



OVERVIEW

- Channel types visited in the past 4 weeks
- Average number of channel types patronized in the past 4 weeks
- Incidence of grocery shopping online and online shopping rejecters
- Barriers to online grocery shopping
- Spending dispositions (price awareness, propensity to spend and adoptiveness)

DETAILED FINDINGS

- Patronage/visits in the past 4 weeks
- Frequency of visit per month
- Average number of channel types patronized
- Average total spend on their last trip
- Usual day and time of visit
- Average dwell time in-store
- Channel Drivers to Patronage

- Shopping Missions
- Average number of categories bought
- Categories bought during last visit
- Categories that trigger a trip to the channel
- Preferred promos

- Retailer equity performances
- Sources of store equity index
- Store equity index performances of Supermarket/hypermarket retailers
- Store relationship by key retailer (funnel from aware to recommenders)
- Relative strengths and weaknesses by retailer

Know the shoppers' repertoire of the different retail channels to buy from

Shopping habits, missions, and what matters to them
(motivations & triggers for choosing the specific channels)

Determine ways to collaborate with retailers by determining their performances (national & select regional retailers) on brand health, equity (level of strength) & imagery

* Super/Hypermarket example. For CV Store Reports: additional info on Ready-to-eat Meals. For Drugstore, on Pharma topics

Key Stories | Shopper Trends Supermarket Report

SAMPLE STORY
(For update based on latest results)



Mindful Shoppers

More shoppers are on a pantry stock mission as they pay a close watch at what they buy in supermarkets



Retailer Affinities

Searching for differentiated retailer impressions



Regional Nuances



Urban South Luzon
Driven by convenience and shopper experience

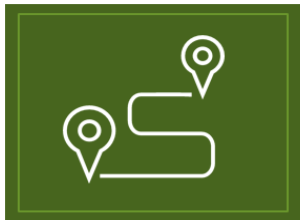


Urban Visayas
Confident and with bigger baskets



Urban Mindanao
Consciously in search of accessibility and promos

Key Stories | Shopper Trends | Convenience (Modern Proximity) Stores



Need for Ease

Ease through accessibility play crucial roles in shopper preferences



Strengthening Affinities

Shoppers are seeing new entrants in the landscape... blurring the lines



Shaking up the usual

How Dali aggressively slides in the neighborhood



Regional Differences

Continued growth nationwide with regional nuances becoming more pronounced

Information List: CORE

Cost-efficient means to obtain shopping fundamentals per retail channel type



SAMPLE STORY
(For update based on latest results)

WHAT DOES IT COVER?

SHOP

- Channel types visited in the past 3 months
- Frequency of visit per month
- Usual day and time of visit, and average dwell time in-store
- Important considerations for choosing where to shop
 - CV Stores with Alfamart & Dali vs without them

SHOPPER

- Demographic profile
- Qualitative sentiments

RETAILER

- Retailer store equity performances and sources of equity
- Retailer Associations (focus on national retailers)
- Relative strengths and weaknesses of select retailers
- Loyalty card by retailers that shoppers own
- Store relationship funnels by key retailers (from aware to consideration, patronage, and recommenders)

SHOPPING

- Shopping Missions
- Preferred promos (overall and by select categories)
- Whether purchase is Planned/Unplanned
- Whether shoppers usually carry a list when buying from Convenience Store
- Other transactions made in Convenience Store during last visit

LOYALTY CARD

- Whether own a Loyalty Card
- Specific Retailers of Loyalty Card that Shoppers Own

CATEGORIES (PRE-NOMINATED)

- Categories bought during last visit
- Reasons for buying RTE (ready-to-eat) food in Convenience Store

Note:

Brand Equity Model, Missions and Exception Analysis contain breaks with (1) CV Stores with Alfamart & Dali vs (2) without Dali & Alfamart



Shaking up the usual

How Dali aggressively
slides in the
neighborhood

Learnings from Retailers including DALI & Alfamart:

Shopper Demographic Profile

**Which of the shopping missions
each retailer drives**

Brand Equity Score
(a measure of brand strength)

Shopper Relationship Funnel
(aware, trial, consider, shop in the past 3 months / regularly / most often / preferred brand to shop at, recommend)

**Store Associations, Brand
Strengths / Weaknesses**
(pre-nominated attributes)

Information List: **CORE**

Cost-efficient means to obtain shopping fundamentals per retail channel type

SHOP

- Channel Types visited in the past 4 weeks & average count
- Frequency of Visit per Month
- Usual day and time of visit, and average dwell time in-store
How they navigate the aisles in-store
- Other channel types where buying medicines, apart from Drugstore
- Products usually bought from a Drugstore
- Specific Brands of Mainstream/Generic products usually bought
- Average Total Spend to the Drugstore

SHOPPER

- Demographic profile
- Spending disposition (price awareness, spend propensity and adoptiveness)
- Channel type associations
- Patronage Incidence
- Promotion sensitivity

RETAILER

- Retailer store equity performances and sources of equity
- Retailer Associations (focus on national retailers)
- Relative strengths and weaknesses of select retailers
- Loyalty card by retailers that shoppers own
- Store relationship funnels by key retailers (from aware to consideration, patronage, and recommenders)

SHOPPING

- Shopping Missions
- Preferred promos (overall and by select categories)
- Whether PDM of Drugstore Store
- Whether alone or have companion during the last visit to the drugstore
- Whether used digital device during in-store shopping
- Whether Doctor prescribed the brand of medicine to buy
- Purchase influencer of OTC products

LOYALTY CARD

- Whether own a Loyalty Card
- Specific Retailers of Loyalty Card that Shoppers Own

CATEGORIES

- Trip trigger categories
- Categories that influence choice on channel type to shop from
- Household Products/categories usually bought in Drugstores

BRANDS

- Whether shoppers ask if Brand is available
- Actions taken if Brand is not available
- Brands of Medicine for cold/fever/flu bought



SAMPLE STORY
(For update based on latest results)

TRACKED BEHAVIOR & NEW STORIES

MAINSTREAM VS GENERIC

Drugstore, Medicines/Over-the-counter supplements
Tracking of similarities and differences

QUALITATIVE MINI-FGDs

New & relevant topics to supplement the latest survey findings with shoppers' sentiments

VALUE-ADD UPDATES from Government Data, Desk Research and NielsenIQ Market Pulse, Retail Audit and Homepanel updates, for example:

- Macro-economic Indicators
- Consumer Confidence/Expectations
- Share of Spend by key expenditures
- Retail Landscape (e.g. numeric count of retail trade/expansion and growth rates by channel type)
- Sources of Growth/Gains and Losses by Channel Type



List of Pre-Nominated Categories, *cont'd*



SAMPLE STORY
(For update based on latest results)

Whether OTC medicines bought are generic or branded

- Medicine type for fever
- Medicine type for headache
- Medicine type for coughs and colds
- Medicine type for pain (pain relievers)

Whether shoppers are asking for **brand or generic** when it comes to these

Whether shoppers are asking for **price** when it comes to these

Actions taken when brand is **not available** for these

Actions taken when brand is **not affordable** for these

- Branded vitamins and supplements
- Branded prescription
- Branded OTC
- Generic vitamins and supplements
- Generic prescription
- Generic OTC

Key Stories | Shopper Trends **Drugstore Report**

WHY VISIT DRUGSTORE?



Recognize shopping mission

Is there change in
shopping missions
over time?

WHERE DO SHOPPERS GO ?



Mind the store type

What is the landscape of
Mainstream and Generic
drugstores like?

WHAT DO SHOPPERS BUY?



Know the importance of labels

How does branded vs
generic medicines
compare?

HOW TO MAINTAIN SHOPPERS LOYALTY?



Stand out among shoppers

How strong are the
affinity and imagery
towards retailers
based on shoppers'
expectations?

Information List: **CORE**

Cost-efficient means to obtain shopping fundamentals per retail channel type



SAMPLE STORY
(For update based on latest results)



SHOP

- Channel types visited in the past 4 weeks & average count
- Frequency of visit per month
- Frequency of top-up shopping (regardless of channel type)
- Usual day and time of visit

SHOPPING

- Shopping Missions
- Location of SSS last visited
- Whether used digital device during in-store shopping
- Items bought during last visit to SSS
- Amount spent during last visit
- Whether or not owner influenced the shopper during last visit to SSS
- Manner of influence by SSS owner to the shopper
- Openness to new variants/flavors/types for pre-nominated products in SSS
- Openness to packaging format for pre-nominated products in SSS

SHOPPER

- Demographic profile
- Patronage Incidence of Sari-sari Store occasionally
- Channel type associations
- Promotion sensitivity
- Propensity to spend
- Preferred promo types in sari-sari stores
- Average monthly expenditure
- Average number of channel types patronized
- Channel types where buying most items

VALUE-ADD UPDATES from Government Data, Desk Research and NielsenIQ Market Pulse, Retail Audit updates, for example:

- Macro-economic Indicators
- Consumer Confidence/Expectations
- Share of Spend by key expenditures
- Retail Landscape (e.g. numeric count of retail trade/expansion and growth rates by channel type)

Key Stories | Shopper Trends **Sari-Sari Store Report**

SAMPLE STORY
(For update based on latest results)

SARI-SARI STORES SHOPPER STORIES



Sustaining the growth

Increasing resilience and strengthening
relevance in the neighborhood



Regional nuances

A look at the differences and similarities in
shopping behavior in SSS

Information List + Value-Adds

Incorporating key figures sourced from the following:

- **NIQ Market Pulse**

- Top 10 Food and Non-Food Categories (Volume & Value) for each key channel type
- Share of Trade per Channel Type and Channel Performances

- **Relevant NIQ Thought Leadership Pieces**

- Regional perspectives and comparisons (vs APAC, vs Global) on select topics (e.g., Private Label)

- **Key Macro-economic Updates**

- GDP Trends
- Inflation Rate
- Consumer Confidence Index
- etc



WHERE IT FITS

NIQ RETAIL PULSE



People who shop

Main decision-maker or key influencers on where to shop



Urban Regions only



Door-to-door, **face to face Interviews** using a structured questionnaire

FMCG + fresh food, pharmacy, ready-to-eat / store-prepared items which are not part of FMCG audited

Focuses on **4 channel types** only



3-4 weeks during Q4 of the prior year

A point-in-time snapshot of the shoppers' journey and sentiments

NIQ RETAIL AUDIT



Sales leaving the store



Nationwide
(Urban+Rural)



Audited data of packaged **FMCG** from retail trade

Packaged FMCG categories for household & individual consumption

Various retail channel types
Continuous, rolling data, longer trend

*Retail performances of packaged FMCG
(volume & value market share, distribution, etc)*

NIQ HOMEPANEL



Household Purchases from set-up **panel**



Nationwide
(Urban + Rural)



Diary logs of purchases of packaged FMCG Categories

Packaged FMCG categories for household consumption

Various retail channel types
Continuous, longer trend

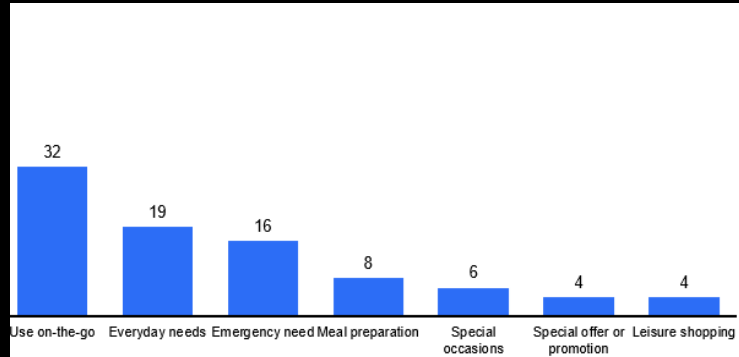
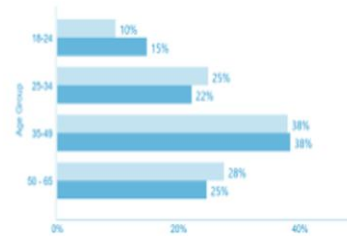
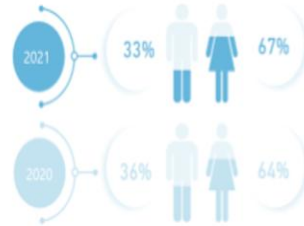
*FMCG metrics for household purchases
(penetration, frequency, spend, weight of purchase, etc)*

Sample outputs

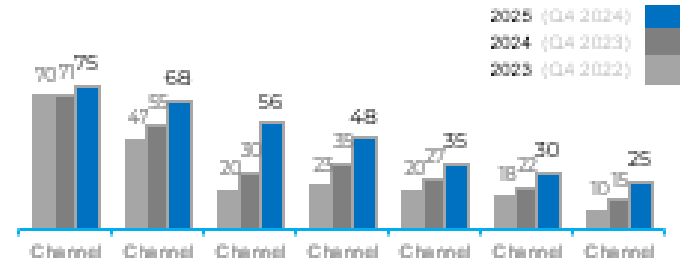
Get to know the shoppers, their shopping missions and repertoire of channel types

ILLUSTRATION
(Not real data)

DEMOGRAPHIC PROFILE OF THE SHOPPERS (BY RETAIL CHANNEL TYPE)

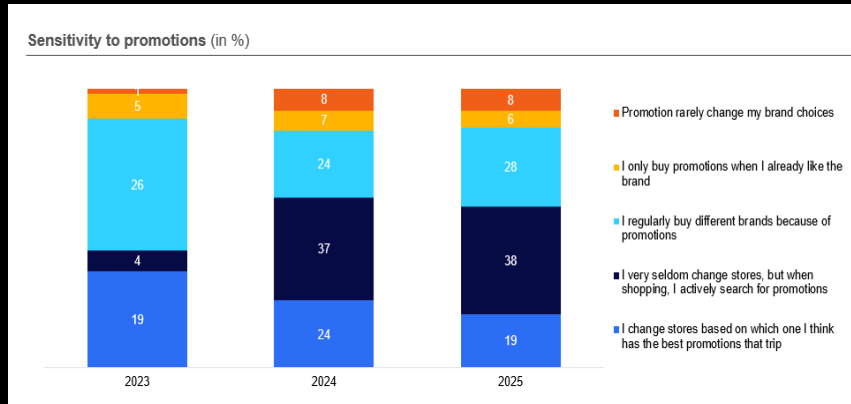
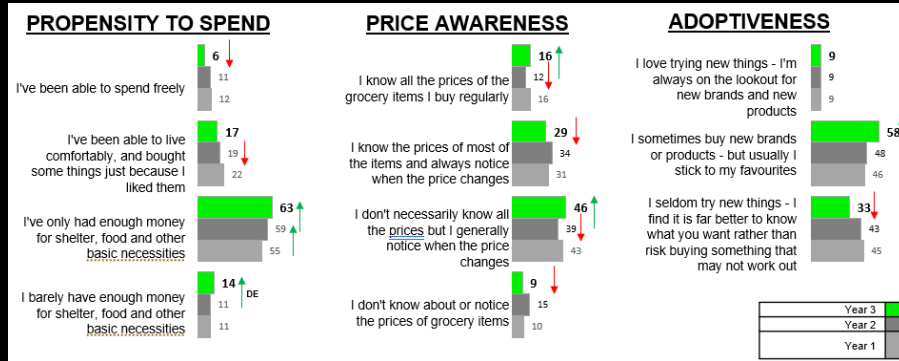


CHANNELS TYPES PATRONIZED IN THE PAST 4 WEEKS (%)



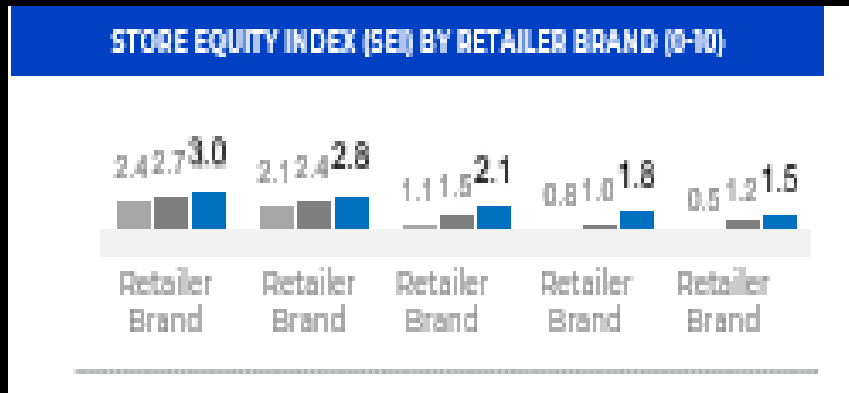
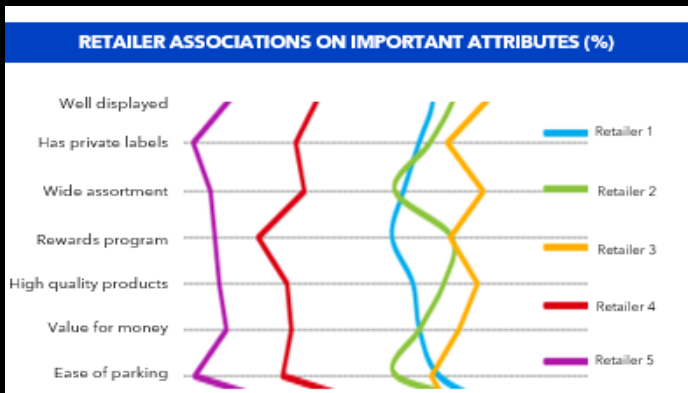
Find out the shoppers' spending flexibility, price consciousness and sensitivity to promotions

ILLUSTRATION
(Not real data)



Have a view of retailer-specific image strengths and needs improvement among major national banners

ILLUSTRATION
(Not real data)



Know what drives patronage to retail channels and at which stage of shopper relationship retailers are in

ILLUSTRATION
(Not real data)

Choice Drivers

Top 10 attributes - Derived importance

2024

Everything I need in one shop

Wide range of fruit and vegetables

Provide enjoyable shopper experience

Ease of registration, purchase and payment

Has a wider variety of products

Are the first to have new products

Easy online ordering (e.g. One-click-ordering, etc.)

High-quality fresh food

Always have what I want in stock

High quality prepared meals

2025

Carries the brands I like ▲

Everything I need in one shop ▼

Wide range of fresh fish and meat

Provide enjoyable shopper experience

High-quality prepared meals

Offers time-slots for home delivery that cost less

Easy online ordering (e.g. One-click-ordering, etc.)

Always have what I want in stock

Ease of registration, purchase and payment

Wide range of fruit and vegetables

2024 vs 2025

In %	Retailer 1		Retailer 2	
	2024	2025	2024	2025
Recommend	20	21	17	19
Preferers	21	22	17	20
Dependables	19	19	18	20
Regulars	49	56	48	55
Considerers	68	75	66	75
Trialists	71	77	68	76
Awareness	19 43 28 90	20 48 28 96	19 44 25 88	22 50 23 94
	TOM SPONT AIDED TOTAL	TOM SPONT AIDED TOTAL	TOM SPONT AIDED TOTAL	TOM SPONT AIDED TOTAL

Why should you subscribe to this report?

- ✓ **Cost-efficient means to obtain learnings on:**
 - retail channel understanding per type
 - trended shopper fundamentals per channel type
- ✓ **Provides a measure of the retailers' brand strength and image impressions per retailer on the important patronage drivers**
 - This aids in account planning and collaboration for manufacturers align products to sell /assortment in the store
- ✓ **Complements / enriches results from Retail Audit, Homepanel & other ad-hoc reports**
 - Contextualizes sales performances through sentiments, *whys* and *hows*

thank you!