



PEPSICO



nailbiter

New Product Pulse (NPP):

Cracking the Code on In-Market Innovation Success



Brodie Dunn

Director, Brand Insights
PepsiCo Foods North
America



Amishi Takalkar

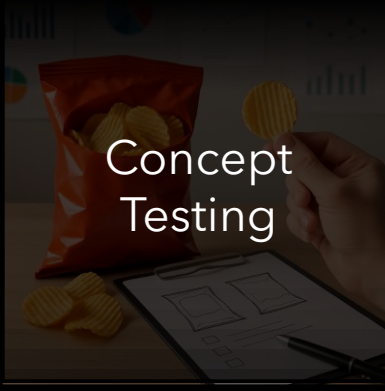
CEO & Co-Founder
Nailbiter

A person is shown working on a product design, with a glass of orange juice and a bag of chips nearby.


Product
Design
Test

A hand is pointing at a map, indicating a specific location for testing.


Central
Location
Testing

A hand is holding a bag of chips, with a clipboard and pen nearby, suggesting a concept test.


Concept
Testing

A man is holding a glowing lightbulb, symbolizing an early idea test.

Early Idea
Testing

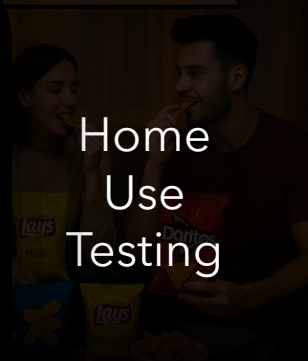
A person is using a tool to optimize packaging, with a bag of chips and a clipboard nearby.

Packaging
Optimization

A hand is holding a bag of chips, with a clipboard and pen nearby, suggesting a concept attribute translation.

Concept
Attribute
Translation

PEPSICO INVESTS BILLIONS ON INNOVATION

A man and a woman are sitting on a couch, eating chips and talking, suggesting a home use test.

Home
Use
Testing

A person is shown eating chips, with a bag of chips and a glass of orange juice nearby.


Total
Eating
Experience

A person is sitting at a desk, looking at a laptop screen displaying charts and graphs, suggesting an integrated consumption panel.

Integrated
Consumption
Panel

A group of people are sitting around a table, looking at a bag of chips, suggesting a 'Jobs to Be Done' session.

Jobs to Be
Done

A person is using a laptop, with a hand pointing at the screen, suggesting a need state validation.

Need State
Validation

A man and a woman are sitting at a desk, looking at a laptop screen, suggesting a new trier survey.

New Trier
Surveys

A person is sitting at a desk, looking at a laptop screen displaying charts and graphs, suggesting direct consumer response data.

Direct
Consumer
Response
Data

WHAT CONSUMERS & SHOPPERS SAY DOES NOT ALWAYS ALIGN WITH WHAT THEY DO!



SAY

Relying only on what consumers & shoppers SAY limits understanding of the full story.

- ✗ Limited details shared
- ✗ Risk of inaccuracy/unreliability
- ✗ Rationalizing behaviors
- ✗ No additional context



DO (BEHAVIORAL)

Capturing what consumers & shoppers DO through observed behaviors helps tell a clearer story.

- ✓ Less consumer burden to recall
- ✓ Validated by actual, real behavior
- ✓ Observations of natural, irrational behaviors
- ✓ Capturing real world influences



WHAT IS NEW PRODUCT PULSE?

HOW IT WORKS

Nailbiter finds the right shoppers at the right time to observe their behaviors.

Shoppers make short, in-the-moment videos recording their purchase decision or consumption moment



Videos and audio are converted into metrics and insights

These metrics build powerful brand, category, and retailer stories



3 KEY STAGES EVALUATED



NOTICEABILITY

How well does the innovation do at grabbing attention at-shelf?



TRIAL & CONVERSION

Does the product attract people to consider purchasing / drive trial, and why?

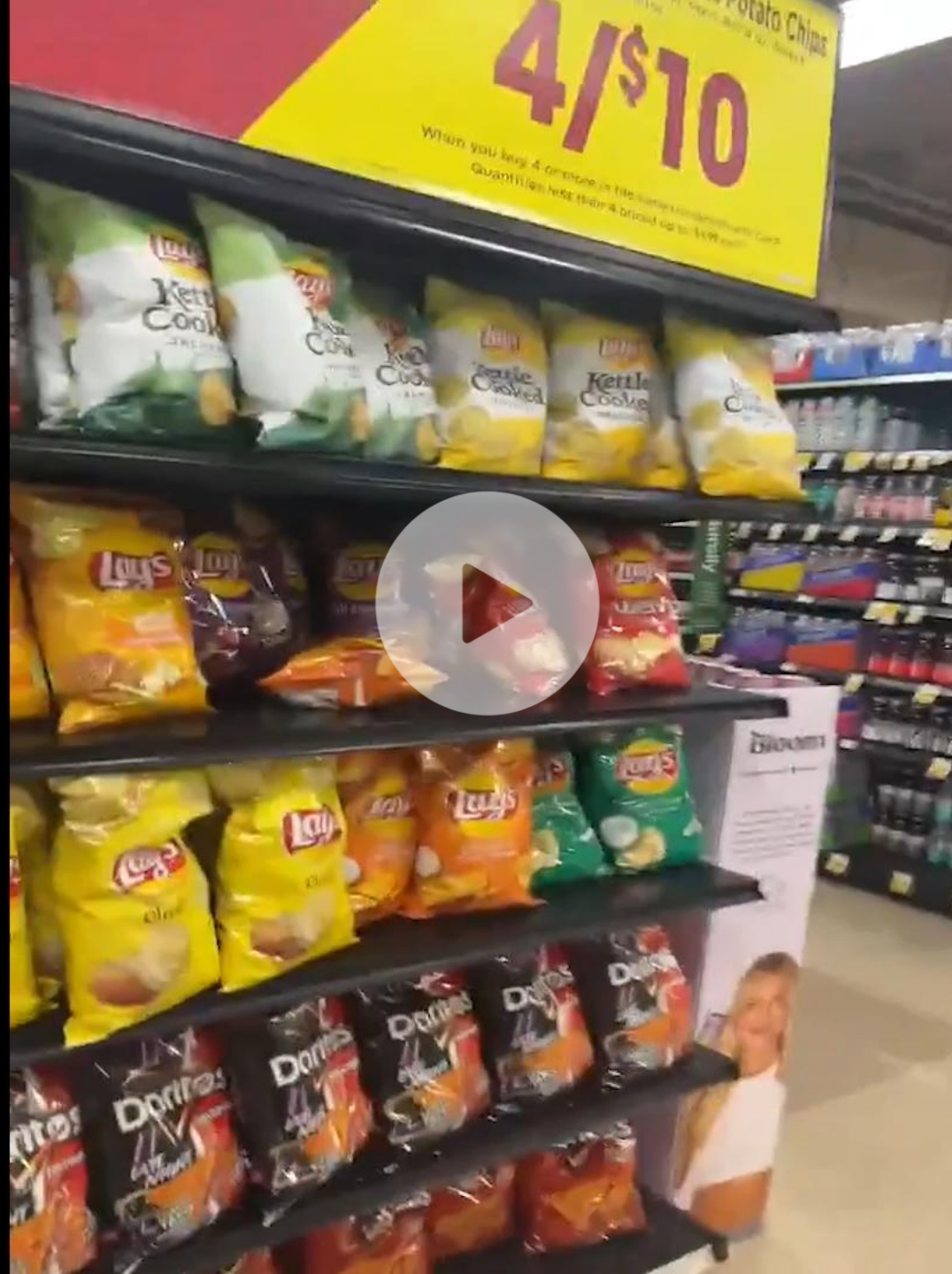


CONSUMPTION EXPERIENCE & REPEAT

Does the product meet expectations at consumption and is there intent to repeat?



CAPTURING BEHAVIOR VIA VIDEO



MUST WIN ALL 3 STAGES

**CAPTURING
NOTICE**

**DRIVING
TRIAL**

**EARNING
REPEAT**





CAPTURING NOTICE

MERCHANDISING MATTERS

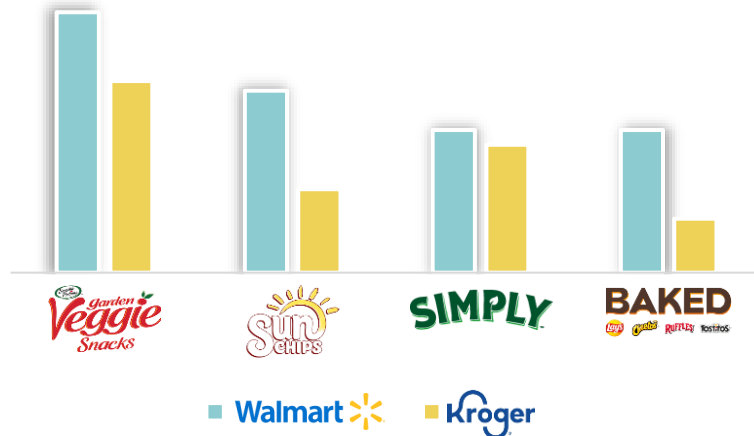
Only in-the-moment video captures how merchandising impacts shopper Notice

Simply, Frito's Permissible line, launched new packaging and flavors early in '25



Notice was higher for Simply and key benchmarks in Walmart vs Kroger, despite Kroger having almost 3x the # of facings

NOTICE BY RETAILER



Walmart

Avg # Simply Brand Facings

~6

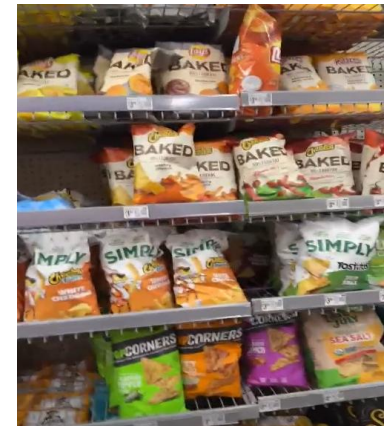
Kroger

Avg # Simply Brand Facings

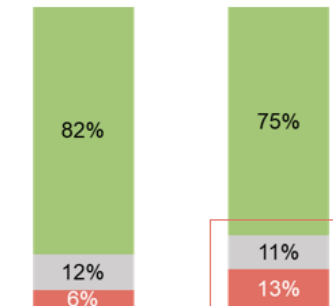
~15

Permissible Salty Snacks are blocked together at Walmart, making it easier to spot Simply—even with fewer facings.

SIMPLY FINDABILITY PERCEPTIONS



Positive Neutral Negative



Walmart

Kroger

DRIVING TRIAL

UNDERSTANDING THE WHY'S

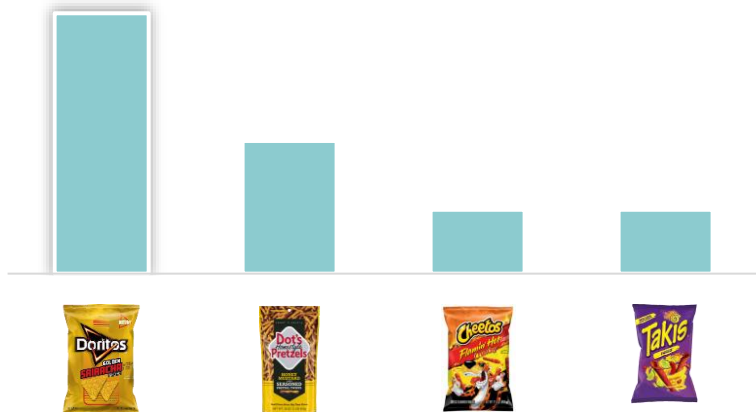
Sales data gives the 'what', Nailbiter gives the 'why'

Doritos Golden Sriracha is a yellow sriracha (a more mild, sweet, tangy flavor vs. red spicy sriracha). There were questions around taste/spice perceptions, especially with spicy cues (red) on pack.



Doritos sees great Conversion, but with better on-pack communication about the spiciness level, it could've convinced even more.

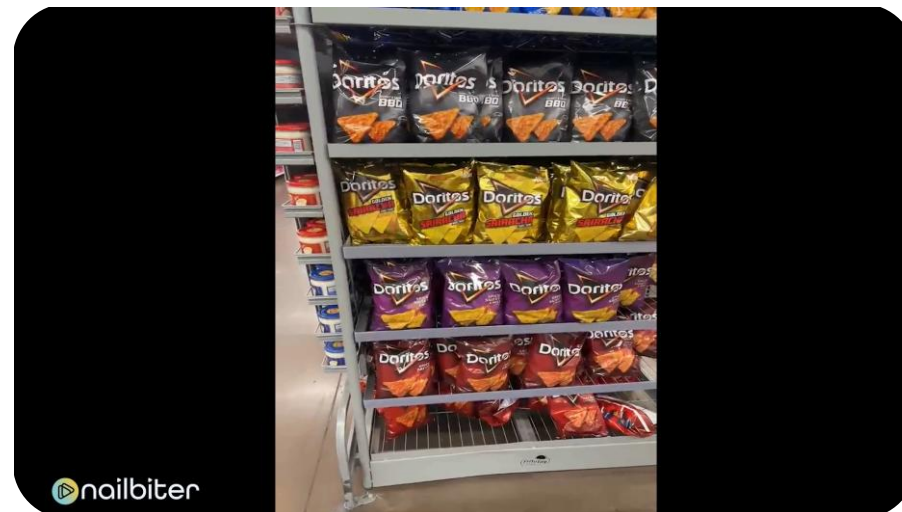
CONVERSION



BARRIERS TO PURCHASE — DORITOS GOLDEN SRIRACHA

4 IN 10 FLAVOR/
SPICE LEVEL

"I'm not sure what they would taste like. Sriracha is generally hot, so I don't think that I'm going to be getting those."



EARNING REPEAT

DELIVER ON EXPECTATIONS

Observing taste experience gives early signs of performance

Cheetos Cheese Pizza Puffs received concerning CX scores tied to taste shortly after launch in early '25. Measuring that impact was key to understanding repeat potential.



WILLINGNESS TO REPEAT PURCHASE

 nailbiter

Norm



"I'm not a huge fan... it tastes like some type of just **artificial Italian** flavor."

"I see myself getting the regular puffs because they have a **cheesier taste** to them."



Dinamita Sticks' discontinuation in 2024 highlights the importance of early repeat diagnostics. Seeing Cheetos Pizza trend similarly signaled the need to pivot—before it was too late.

Without a database, this warning sign could've been missed.

WHAT WE'VE LEARNED

1



Collaborative, future-focused partnerships lead to actionable insights

2



Drive actionability across the organization to maximize potential - avoid the silo!

3



Don't be afraid to push boundaries!





FIND US
at booth:
#427

Learn what
Videometrics can do
for your brand



THANK YOU!
CONNECT
with us at
info@nailbiter.com

SHOPPER

In-store Shopper
Journey

Path to
Purchase

Impulse
Tracker

E-COMM

E-comm Shopper
Journey

Digital
Touchpoints

UI/ UX

PLANOGRAM

Aisle of the Future

Planogram
Shopability

AR Planogram
Testing

MARKETING

In-store Displays &
Activations

Digital Marketing

AR Display Testing

PRICING

Price Sensitivity &
Testing

Price/ Value
Perception

AR Price
Testing

IMMERSION

Usage
& Behaviors

Segmentation &
Demand Space

Seasons & Rituals

PACK & PRODUCT

Pack Benchmarking

Product Success
Drivers

AR Pack & Product
Testing

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