TODAY’S PRESENTER

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TODAY: MORE SHOPPERS OUT THERE
TOMORROW: EVEN MORE OPTIONS EVERYWHERE

BRANDS, PRODUCTS AND CATEGORIES

IN-STORE INFLUENCES AND INNOVATIONS

CHANNELS
HOW DO YOU NAVIGATE ASIA’S SHOPPING SAFARI?
EVOLVE OR DISSOLVE

From

I know all customer segments for my brand

They are walking into my store

Safe strategies:
• Price
• Promotion

To

I know all key shopper segments for my brand

Their baskets can tell me why they stepped in, what’s in demand and how they shop in-store

Smart strategies:
• Smart pricing
• Innovation
• Impulse
THE STORE: A JUNGLE OUT THERE

With diverse shoppers across developing and developed Asia, can you satisfy all?

FRESH AND FREQUENT
57%
I like to shop everyday to provide fresh and healthy food for my family

EVOLVED HEALTHY
16%
I know the benefits of good products and will spend to get them

SMART PRAGMATIST
6%
I know how to get maximum value out of a shopping trip

FRUGAL BUDGETERS
9%
I buy only what I want, and can accommodate within my budget

QUALITY SPENDERS
9%
I pick up the best of everything, price is no issue

PRICE AND PROMO OBSESSED
3%
There is always a cheaper alternative or a better deal

Source: Nielsen Shopper Trends 2014
FRESH AND FREQUENT

VISITS
2.2
STORES IN THE PAST MONTH

Price aware

Open to switching brands for good deals

Visits:
• Traditional grocery
• Minimarts
• Supermarkets

“I like to shop every day to provide fresh and healthy food for my family.”

Source: Nielsen Shopper Trends 2014
## Decoding the Fresh and Frequent Shopper

"Shops every day for freshness"

### Why They Buy

| 1 store for... | ... immediate, fresh food needs |
| 1 store for... | ![Image of a meat]. |

| Another for... | ... stocking up the pantry |
| Another for... | ![Image of pantry]. |

### Loyal or Fickle?

Enjoys taking advantage of deals in her trusted stores and brands.

DECODING THE FRESH AND FREQUENT SHOPPER

“Shops every day for freshness”

WHERE THEY SHOP

Average shopping frequency/month

15.7
Traditional
grocery

11.7
Wet
markets

5.6
Minimarts

4.3
Super-
markets

3.4
Hyper-
markets

HOW THEY SHOP

DOs
• enjoy shopping (97%)
• prefer well organised stores (94%)
• buy healthy options (92%)
• take advantage of deals (91%)
• buy additional items in store (91%)

DON’Ts
• compare store brands (60%)

Source: Nielsen Shopper Trends 2014
EVOLVED HEALTHY

VISITS 2.1 STORES IN THE PAST MONTH

Visits:
- Traditional grocery
- Minimarts
- Supermarkets

“I know the benefits of good products and will spend to get them!”

No budget constraints

Cares for quality and eco-friendly products

Prefers healthier options

Source: Nielsen Shopper Trends 2014
SMART PRAGMATIST

VISITS
2.4
STORES IN THE PAST MONTH

Ready to browse

Promotion conscious

Visits
• Traditional grocery
• Supermarkets
• Minimarts

"I know how to get maximum value out of a shopping trip!"

MAINLY FEMALES, NO SKEW FOR AGE

Source: Nielsen Shopper Trends 2014
SMART SHOPPERS HUNT DOWN DEALS, HEALTHY SHOPPERS STOCK UP

SMART PRAGMATIST
Buys more for immediate needs, actively switching to stores or brands on promotions

FRESH AND FREQUENT
Changes store or brand

SMART PRAGMATIST
Buys within preferred store or brand

EVOLVED HEALTHY
Shops for immediate needs, stock-ups and leisure and have little interest in promotions

Source: Nielsen Shopper Trends 2014
why before buy
ASIA ON A MISSION: TO SHOP, STOCK OR SNACK

**DEVELOPED**

- Australia: 51%
- Korea: 4%
- New Zealand: 15%
- Singapore: 5%
- China: 10%
- India: 14%
- Indonesia: 5%
- Malaysia: 8%
- Philippines: 8%
- Thailand: 67%
- Vietnam: 25%

**DEVELOPING**

- Australia: 7%
- Korea: 8%
- New Zealand: 4%
- Singapore: 5%
- China: 10%
- India: 14%
- Indonesia: 5%
- Malaysia: 8%
- Philippines: 6%
- Thailand: 3%
- Vietnam: 25%

*Source: Nielsen Shopper Trends 2014*
MISSIONS DRIVE STORE CHOICE

<table>
<thead>
<tr>
<th>Mission</th>
<th>Traditional grocery</th>
<th>Supermarkets</th>
<th>Convenience</th>
<th>Hypermarts</th>
<th>Convenience</th>
<th>Minimarks</th>
<th>Supermarkets</th>
<th>Traditional grocery</th>
<th>Hypermarts</th>
<th>Minimarks</th>
<th>Supermarkets</th>
<th>Traditional grocery</th>
</tr>
</thead>
<tbody>
<tr>
<td>LARGE PANTRY RESTOCK</td>
<td>45%</td>
<td>58%</td>
<td>51%</td>
<td>58%</td>
<td>60%</td>
<td>49%</td>
<td>44%</td>
<td>58%</td>
<td>58%</td>
<td>46%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>PANTRY STOCK-UP</td>
<td>44%</td>
<td>39%</td>
<td>41%</td>
<td>43%</td>
<td>44%</td>
<td></td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>EVERYDAY NON FOOD</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>MEAL PREP</td>
<td></td>
<td></td>
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<tr>
<td>URGENT</td>
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<td></td>
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</tr>
<tr>
<td>ON THE GO</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.2 stores in past 4 wks

2.2
2.2
2.8
2.3
2.5

Source: Nielsen Shopper Trends 2014
DIFFERENT STORES CAN SERVE THE SAME MISSION

Channel distinction is blurring

<table>
<thead>
<tr>
<th>REGULAR PANTRY STOCKING</th>
<th>THAILAND</th>
<th>INDONESIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Convenience Store (76%)</td>
<td>• Traditional Grocery (73%)</td>
<td></td>
</tr>
<tr>
<td>• Hypermarket (52%)</td>
<td>• Minimarts (66%)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EVERYDAY NEEDS/MEAL PREPS</th>
<th>KOREA</th>
<th>SINGAPORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Super/Hypermarkets (97%)</td>
<td>• Supermarkets (94%)</td>
<td></td>
</tr>
<tr>
<td>• Convenience (61%)</td>
<td>• Wet markets (53%)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>URGENT ON THE GO</th>
<th>VIETNAM</th>
<th>INDONESIA</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Wet markets (90%)</td>
<td>• Traditional grocery (79%)</td>
<td></td>
</tr>
<tr>
<td>• Traditional grocery (78%)</td>
<td>• Minimarts (75%)</td>
<td></td>
</tr>
</tbody>
</table>

Source: Nielsen Shopper Trends 2014
STORES ARE CATCHING ON SHOPPER TRENDS

We’ve seen store formats evolving to meet shopping missions

SMART LAYOUT
Food for later
Food for now
Top-up shop

SMART FORMAT
Traders for business
Matrix for electronics
- Special spend
- Family outing
Molly’s for pet supplies

GOODBYE CATEGORIES, HELLO MISSIONS
### Enable the Missions to Drive In-Store Tactics

#### Shopping Missions

<table>
<thead>
<tr>
<th>Mission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Pantry Restock</td>
<td>44% Well organized, pleasant, Pay more for quality</td>
</tr>
<tr>
<td>Pantry Stock-Up</td>
<td>15% Well organized, pleasant, Pay more for quality</td>
</tr>
<tr>
<td>Everyday, Non-Meal Prep</td>
<td>16% Special deals</td>
</tr>
<tr>
<td>Meal Prep</td>
<td>6% Buy what I need</td>
</tr>
<tr>
<td>Need It Now</td>
<td>11% Pay more for time saving</td>
</tr>
<tr>
<td>On the Go</td>
<td>4% Well organized, pleasant, Pay more for quality</td>
</tr>
</tbody>
</table>

#### Enable the Mission.....

- **Satisfy predictable needs for frequently used HH items**
- **Practical, quality and control**
- **Satisfy daily needs**
- **Fresh, savvy and practical**
- **Satisfy immediate needs and shortages**
- **Spontaneity, Convenience and access**

Source: Nielsen Shopper Trends 2014
LET’S TALK ABOUT MEN

Male shoppers are less sensitive to promotions and prefer brands they trust

- ON-THE-GO SHOPPERS (1.6Xs more than females)
- MARRYING LATER
- MORE DIVORCES

Sources: Nielsen Shopper Trends 2014, Asia Research Institute
HE’S BUYING MORE FOR THE HOUSE

What men buy more than women
(categories with >50% male shoppers among 54 categories)

INDIA   AUSTRALIA   INDONESIA
TRADITIONAL MALE PRODUCTS
Beer     Razor       Shaving foam

KOREA
HOME CARE AND HYGIENE
Air freshener  Bar soap  Batteries

CONFECTIONARY AND SNACKS
Chocolates  Biscuits  Ice Cream

MEAL PREPARATIONS AND BEVERAGES
Packaged rice  Fresh meat/seafood  Bottled water  Wine

CHINA
56%

CHINA
56%

Source: Nielsen Category Shopper Fundamentals Study 2014
HE’S MORE INVOLVED NOW

“Men-only” products growing 50% faster than “total personal care”

At least 1 in 4 shoppers are male
Growing 2Xs in last 4 years

Use 7 different personal care products every 2 months

Sources: Nielsen Research; Nielsen Shopper Trends 2014
HE NEEDS DIRECTIONS
To locate products in the store

**AUSTRALIA**

- Sole decision maker: 47% (Male 51%, Female 42%)
- Largely sole decision maker: 20% (Male 18%, Female 21%)
- Limited brand to satisfy others: 17% (Male 15%, Female 19%)
- Specific brand to satisfy others: 19% (Male 15%, Female 13%)

**INDONESIA**

- Sole decision maker: 22% (Male 24%, Female 20%)
- Largely sole decision maker: 18% (Male 15%, Female 20%)
- Limited brand to satisfy others: 15% (Male 13%, Female 19%)
- Specific brand to satisfy others: 15% (Male 13%, Female 19%)

**SINGAPORE**

- Sole decision maker: 37% (Male 41%, Female 31%)
- Largely sole decision maker: 23% (Male 23%, Female 23%)
- Limited brands to satisfy others: 21% (Male 25%, Female 18%)
- Specific brands to satisfy others: 20% (Male 22%, Female 18%)

Source: Nielsen Category Shopper Fundamentals Study 2014
STRATEGY
non-price plays
RETAIL ASIA: OPTIMISTIC OUTLOOK?

MORE STORES

Growth in MT stores in the last 5 years

<table>
<thead>
<tr>
<th>Country</th>
<th>Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>8%</td>
</tr>
<tr>
<td>HK</td>
<td>2%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>2%</td>
</tr>
<tr>
<td>Singapore</td>
<td>2%</td>
</tr>
<tr>
<td>Australia</td>
<td>1%</td>
</tr>
<tr>
<td>NZ</td>
<td>0%</td>
</tr>
</tbody>
</table>

MORE CHOICES

% growth of food and beverage choices in the last 5 years

- Vietnam: 75%
- Philippines: 20%
- Indonesia: 20%
- Korea: 14%

Source: Nielsen Retail Index 2014
MORE CHOICES = LESS STORE LOYALTY?

Asia Pacific shoppers visited 22% more stores now than five years ago

**DEVELOPED ASIA > 2 STORES**

<table>
<thead>
<tr>
<th>Country</th>
<th>Stores visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>3.6</td>
</tr>
<tr>
<td>Australia</td>
<td>3.5</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>3.2</td>
</tr>
<tr>
<td>New Zealand</td>
<td>2.2</td>
</tr>
<tr>
<td>Singapore</td>
<td>1.9</td>
</tr>
<tr>
<td>Taiwan</td>
<td>1.8</td>
</tr>
</tbody>
</table>

**DEVELOPING ASIA 1-2 STORES**

<table>
<thead>
<tr>
<th>Country</th>
<th>Stores visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>2.4</td>
</tr>
<tr>
<td>China</td>
<td>2.2</td>
</tr>
<tr>
<td>Malaysia</td>
<td>1.7</td>
</tr>
<tr>
<td>Philippines</td>
<td>1.6</td>
</tr>
<tr>
<td>Thailand</td>
<td>1.5</td>
</tr>
<tr>
<td>India</td>
<td>1.4</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1.4</td>
</tr>
</tbody>
</table>

Source: Nielsen Shopper Trends 2014

APAC 2009: 1.8 → APAC 2014: 2.2

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SUPERMARKETS ARE BIG ON PROMOTIONS

As much as hypermarkets in China and Indonesia

% Spent on Promotion by Channel

Source: Nielsen Consumer Panel
YET PRODUCTS ARE NOT FLYING OFF THE SHELVES
With fragmentation and slowing growth rate.....

Volume Growth Rate, 1H 2014 vs. 1H 2013

Korea
Volume Growth Rate: 0.8 vs. 1H 2013: -1.6

Indonesia
Volume Growth Rate: 13.4 vs. 1H 2013: -4.5

Thailand
Volume Growth Rate: 4.7 vs. 1H 2013: -0.3

Australia
Volume Growth Rate: 0.2 vs. 1H 2013: 1.1

Vietnam
Volume Growth Rate: 8.2 vs. 1H 2013: -3.0

Philippines
Volume Growth Rate: 0.7 vs. 1H 2013: 1.0

Source: Nielsen Retail Index 2014
LOW PRICES ARE NOT PRIORITY FOR SHOPPERS

HOW LOW PRICES RANK IN STORE CHOICE

Out of 27 attributes

<table>
<thead>
<tr>
<th>Country</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>Shoppers who think prices have increased</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUSTRALIA</td>
<td>21</td>
<td>23</td>
<td>26</td>
<td>21</td>
<td>78%</td>
</tr>
<tr>
<td>THE PHILIPPINES</td>
<td>5</td>
<td>5</td>
<td>26</td>
<td>25</td>
<td>91%</td>
</tr>
<tr>
<td>INDONESIA</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>69%</td>
</tr>
<tr>
<td>THAILAND</td>
<td>5</td>
<td>2</td>
<td>7</td>
<td>11</td>
<td>62%</td>
</tr>
</tbody>
</table>

Source: Nielsen Shopper Trends 2014
LESS THAN 15% OF SHOPPERS SWITCH STORES DUE TO PROMOTIONS
Thai, Korean, Malaysian and Chinese shoppers are most responsive to promotions

Shoppers claimed response to promotions

**DEVELOPED**
- AUSTRALIA: 18% Change Store, 32% Actively Search, 50% Change Brands
- KOREA: 16% Change Store, 42% Actively Search, 23% Change Brands
- HK: 15% Change Store, 23% Actively Search, 31% Change Brands
- TAIWAN: 9% Change Store, 31% Actively Search, 28% Change Brands
- SINGAPORE: 7% Change Store, 50% Actively Search, 11% Change Brands
- NZ: 27% Change Store, 30% Actively Search, 30% Change Brands
- THAILAND: 17% Change Store, 37% Actively Search, 24% Change Brands
- CHINA: 17% Change Store, 32% Actively Search, 28% Change Brands
- INDONESIA: 8% Change Store, 38% Actively Search, 8% Change Brands
- MALAYSIA: 7% Change Store, 57% Actively Search, 13% Change Brands
- VIETNAM: 7% Change Store, 33% Actively Search, 18% Change Brands

**DEVELOPING**

Source: Nielsen Shopper Trends 2014
SO WHAT’S YOUR STRATEGY TO NAVIGATE ASIA’S SHOPPING SAFARI?
ARE YOU PRICING SMARTLY?
### ASIA: WHO BUYS WHAT ON PROMOTIONS?

**Top 5 categories - % spent on promotions**

<table>
<thead>
<tr>
<th>Country</th>
<th>Category</th>
<th>79%</th>
<th>70%</th>
<th>66%</th>
<th>65%</th>
<th>64%</th>
</tr>
</thead>
<tbody>
<tr>
<td>SINGAPORE</td>
<td>Oral Slimming</td>
<td>79%</td>
<td>70%</td>
<td>66%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td></td>
<td>Essence of Chicken</td>
<td>70%</td>
<td>66%</td>
<td>65%</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Adult Diapers</td>
<td>66%</td>
<td>65%</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Liquid Milk</td>
<td>65%</td>
<td>64%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ice Cream Tubs</td>
<td>64%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>THAILAND</td>
<td>Shampoo</td>
<td>55%</td>
<td>54%</td>
<td></td>
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<tr>
<td></td>
<td>Fabric Softener</td>
<td>54%</td>
<td>51%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Disposable Diapers</td>
<td>51%</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Tonic Food Drinks</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Instant Coffee</td>
<td>50%</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Australia**

- 80% Boxed Chocolates
- 73% Soft Drinks
- 65% Energy/Sports/Iced Tea
- 62% Bakery Snacks
- 61% Ice Cream

**Source:** Nielsen Consumer Panel
BE SELECTIVE WITH PRICING AND PROMOTIONS

Thailand sales vs. discount analysis

Source: Nielsen ScanTrack
MORE PROMOTIONS = MORE SALES?

BOUGHT MORE ON PRICE PROMOTIONS

BOUGHT MORE ON REGULAR PRICE

AUSTRALIA | JAPAN | KOREA | SINGAPORE | CHINA | INDIA

Diapers | CSD | Coffee | Shampoo | Laundry Detergent | Toothpaste | Razors for men | Infant formula | Facial moisturizer | Canned Tuna | Margarine and Butter | Packaged Rice | Vitamins and Supplements

Source: Nielsen Category Shopper Fundamentals Study 2014
ARE YOU CONSTANTLY INNOVATING?
ATTENTION SEEKERS IN THE AISLE: NEW PRODUCTS AND INTERESTING PACKAGING

What do in-store browsers look for?

- 7 in 10 packaging or new products (47%)
- New product (18%)
- POSM (12%)
- Check out (12%)
- Pack (11%)

Source: Nielsen Category Shopper Fundamentals Study 2014
NOT ALL NEW LAUNCHES ARE SUCCESSFUL

New Product Launch Activation

shower perception of category innovation/change

Low impact – low cardio

Low impact – high cardio

High impact – low cardio

High impact – high cardio

% of new SKUs launched in the past 2 years

Source: Nielsen Category Shopper Fundamentals Study 2014
DRIVE TRIAL WITH THE RIGHT PRODUCTS

Shoppers are looking for new and compelling reasons to justify full price

Source: Nielsen Category Shopper Fundamentals Study 2014
ARE YOU CAPITALISING ON IMPULSE SHOPPERS?
ONE-THIRD OF CATEGORY DECISIONS ARE INFLUENCED IN-STORE

Are you seizing these opportunities?

- **Decided**
  - “I planned to purchase *category* before I arrived at the store”
  - “I wanted *category*, but only recalled the need in the store”
  - “I decided to buy *category* once in the store”

- **Planned**

- **Reminder**

- **Impulse**

**Opportunity to Influence**

34% Across 17 categories in 14 countries

Source: Nielsen Category Fundamentals 2014
BASKETS CAN GROW WITH IMPULSE/REMINDERS

In-store triggers drive sales significantly

Planned vs. impulse percentage

SINGAPORE

- True Impulse = didn’t specifically need the item, but decided to buy in store
- Reminder = needed item, but only recalled the need once in store
- Planned = needed item and planned to buy before arriving at the store

KOREA

INDIA

Source: Nielsen Category Shopper Fundamentals Study 2014
MULTITUDE OF IN-STORE TOUCHPOINTS DO THE JOB

Category Touch-points
(i.e. advertising, conversations, friends recommendations, promotions)

<table>
<thead>
<tr>
<th>Category</th>
<th>Pre-store</th>
<th>In-store</th>
<th>Don’t remember any</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margarine/butter</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packaged rice</td>
<td></td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Canned tuna</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dried pasta</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy drinks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vitamins/supplements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packaged (dry/powdered) soup</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Batteries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mouthwash</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shaving cream</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body lotion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feminine products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hair Conditioner</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Nielsen Category Shopper Fundamentals Study 2014
PERSUADE WITH IN-STORE MARKETING THAT RESONATES

VISIBILITY
- Interrupt shopper journey to drive conversion
- POS that utilise imagery to tantalize the senses and achieve impactful in-store presence

CALL TO ACTION:
Overlay POS with a short action oriented banner and clear message

AVAILABILITY:
Avoid out-of-stock, radical brand or store repositioning that disrupts auto-pilot

ACTIVATION:
Keep a close eye on competitive pricing and ensure promos tip the scale to your advantage

Source: Nielsen Category Shopper Fundamentals Study 2014
THE HUNT IS ON.....

KNOW

SHOPPER
who’s who

ACT

STORE
why before buy

GROW

STRATEGY
non-price plays
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