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ASIA'S SHOPPING SAFARI

THE HUNT IS ON

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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

To

From		To
I know all customer segments for my brand	→	I know all **key** shopper segments for my brand
They are walking into my store	→	Their baskets can tell me **why** they stepped in, **what's** in demand and **how** they shop in-store
Safe strategies: • Price • Promotion	→	**Smart** strategies: • Smart pricing • Innovation • Impulse

SHOPPER

who’s who

STORE

why before buy

STRATEGY

non-price plays


SHOPPER
who’s who

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."

FEMALE
25 – 49

%

Source: Nielsen Shopper Trends 2014

EVOLVED HEALTHY

VISITS
2.1
STORES IN THE PAST MONTH

No budget constraints

Cares for quality and eco-friendly products

Prefers healthier options

Visits:
- Traditional grocery
- Minimarts
- Supermarkets

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

YOUNGER AGE GROUPS (18–34)

Source: Nielsen Shopper Trends 2014

SMART PRAGMATIST

VISITS
2.4
STORES IN THE PAST MONTH

Ready to browse

Promotion conscious

NEWS

%

Visits
- Traditional grocery
- Supermarkets
- Minimarts

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

MAINLY FEMALES,
NO SKEWS
FOR AGE


STORE
why before buy

ASIA ON A MISSION: TO SHOP, STOCK OR SNACK

Source: Nielsen Shopper Trends 2014

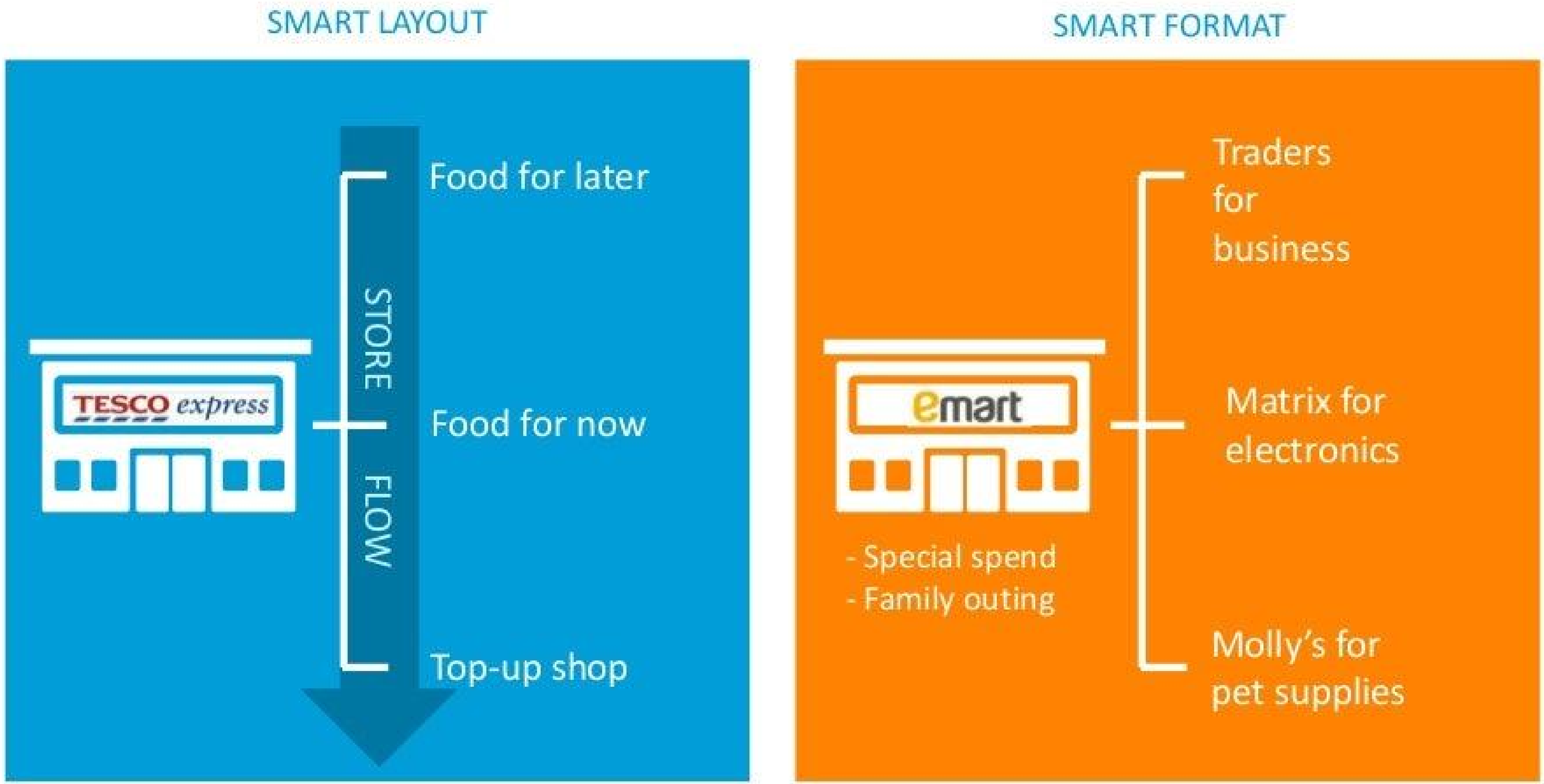
MISSIONS DRIVE STORE CHOICE

LARGE PANTRY RESTOCK	PANTRY STOCK-UP	EVERYDAY NON FOOD	MEAL PREP	URGENT	ON THE GO
Traditional grocery 45%	Supermarkets 58%	Convenience 51%	Hypermarkets 58%	Convenience 60%	Minimarkets 49%
Supermarkets 44%	Hypermarkets 39%	Hypermarkets 41%	Supermarkets 43%	Traditional grocery 44%	Hypermarkets 46%
Convenience 44%	Traditional grocery 29%	Minimarkets 34%	Wet markets 34%	Supermarkets 38%	Traditionl grocery 37%
2.2 stores in past 4 wks	2.2	2.2	2.8	2.3	2.5

Source: Nielsen Shopper Trends 2014

STORES ARE CATCHING ON SHOPPER TRENDS

We've seen store formats evolving to meet shopping missions



GOODBYE CATEGORIES, HELLO MISSIONS

ENABLE THE MISSIONS TO DRIVE IN-STORE TACTICS

SHOPPING MISSIONS

LARGE PANTRY RESTOCK	PANTRY STOCK-UP	EVERYDAY, NON-MEAL PREP	MEAL PREP	NEED IT NOW	ON THE GO
44%	15%	16%	6%	11%	4%
Well organized, pleasant	Well organized, pleasant	Special deals	Buy what I need	Pay more for time saving	Well organized, pleasant
Pay more for quality	Pay more for quality	Well organized, pleasant	Special deals	Buy what I need	Pay more for time saving

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 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


STRATEGY
non-price plays