Retail & The Consumer Lens
THE CONSUMER PURCHASE JOURNEY...THEN

DEMAND  PRE-STORE  IN-STORE  PURCHASE  LOYALTY
THE CONSUMER PURCHASE JOURNEY... NOW
TODAY'S SHOPPER JOURNEY IS FRAGMENTED

UNPRECEDEDENT TIME OF CHANGES AND CHALLENGES

~30-35% fewer banner & +20,000 new stores by 2025
Restaurant spend exceeds grocery spend
10-20% of food & beverage purchases made online by 2025
E-commerce & value operators drive margin compression

45% of center store categories
FLAT OR DECLINING
representing 40% of total revenue (5’s)

Recent Growth primarily attributed to inflation (past 2 years)

Net disposable income projected to grow < 1% per year through 2025

US population is growing at the slowest rate since the Great Depression (<0.8%)
CONSUMER TRENDS FUELING RETAIL STRATEGIES

Digital Retailing
Providing Value with Own Brands
Health & Wellness
Prepared Foods

BUT WINNING RETAILERS FOCUSED ON...

Precision
Personalization
NIELSEN MAKES SENSE OF THE CONSUMER’S WORLD

COMPUTER

IN-STORE

COMMUNICATE

BUY

LISTEN

WATCH

RETAILER DATA

NIELSEN DATA

PARTNER DATA
HARMONIZING DATA, ANALYTICS & TECH
RESULTING IN MORE INTELLIGENT DECISION MAKING

DATA
Unmatched assets across all buying & engagement channels

TECHNOLOGY
Next generation & artificial intelligence

ANALYTICS
Always-on journey analytics & attribution

SUMMARY
Consumer path to purchase is in a period of disruption and increased complexity, but there are also expanding opportunities

Measurement, therefore, is transforming

Connected data, technology and analytics for real time activation

Precision & personalization key – winning retailers will stay focused on consumers