



NIELSEN OVERVIEW

AUGUST 2018



OUR PURPOSE

We are a global, independent measurement company that's focused on your future. With data backed by real science to drive your business forward, you'll always know what's next—and get there first.



YOUR BUSINESS IS OUR BUSINESS

BUY



WATCH



THE SCIENCE BEHIND WHAT'S NEXT™



DATA

Our data is complete, trusted and useful, so you can depend on it to anchor your important decisions.



SCIENCE

Our science marries rigor with innovation to give you answers that point the way forward.

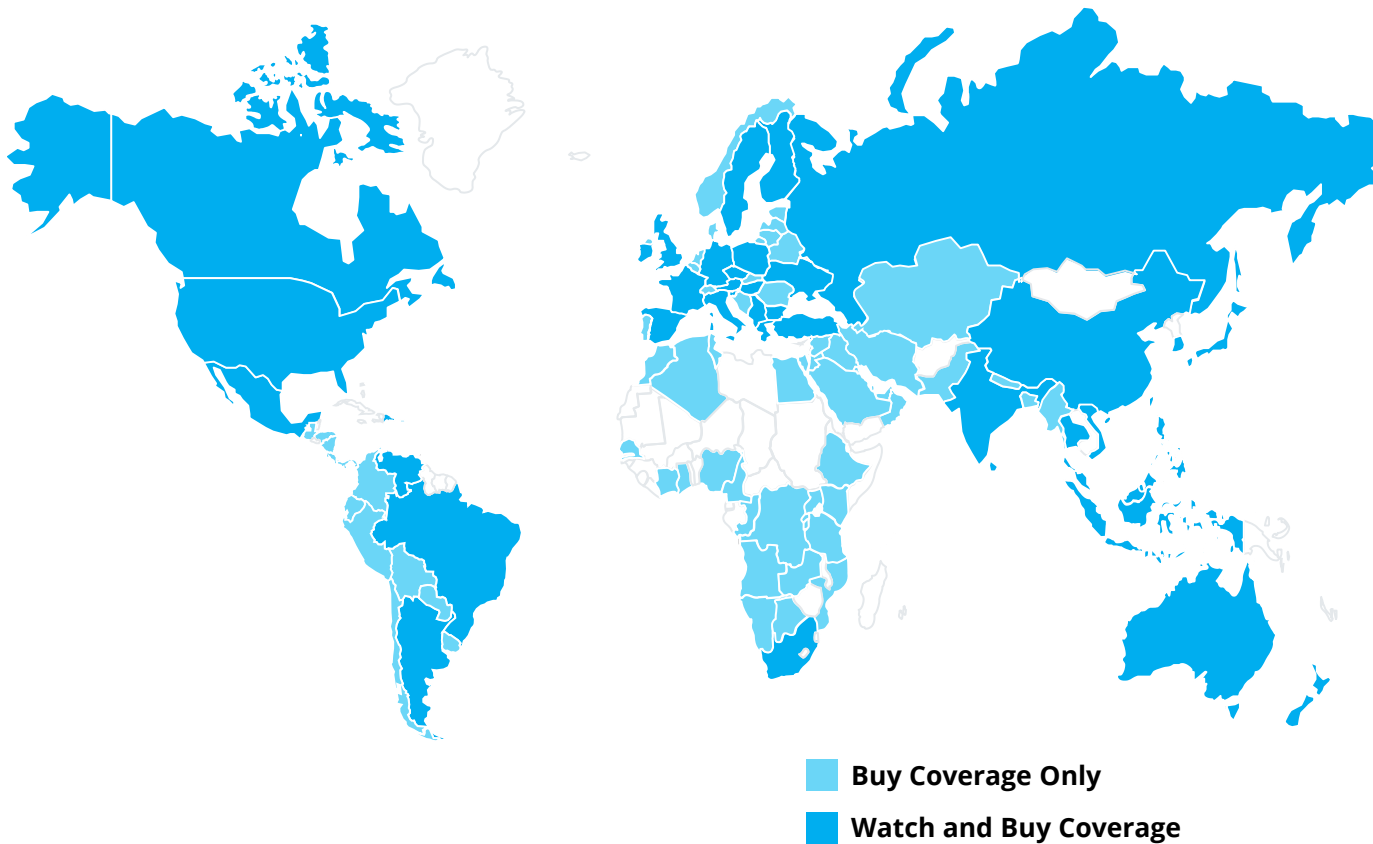


PEOPLE

We are a company of truth seekers, driven to get it right for your business.



MORE PLACES, MORE COVERAGE



WE MAKE OUR CLIENTS MORE EFFICIENT

Unparalleled level of acquisitions to deliver growth for our clients

>\$2B

in INVESTMENTS
DATA, APPLICATIONS,
ANALYTICS AND PEOPLE



Total Measurement

*Total Audience / Total Consumer
across platforms, geographies and
channels*

Connected System

*Open Philosophy & Platform
Connected Partners
Everyday Analytics*

Nielsen Marketing Cloud

*Digital Marketing Platform
Targeting Individuals
ROI Measurement/Analytics*

Global Coverage

*100+ Countries
Covering 90% of globe's GDP &
Population*

SOLUTIONS THAT POINT THE WAY FORWARD



NIelsen CONNECTED SYSTEM

Sync your entire business and take action.



NIelsen MARKETING CLOUD

Connect more deeply with your customers.

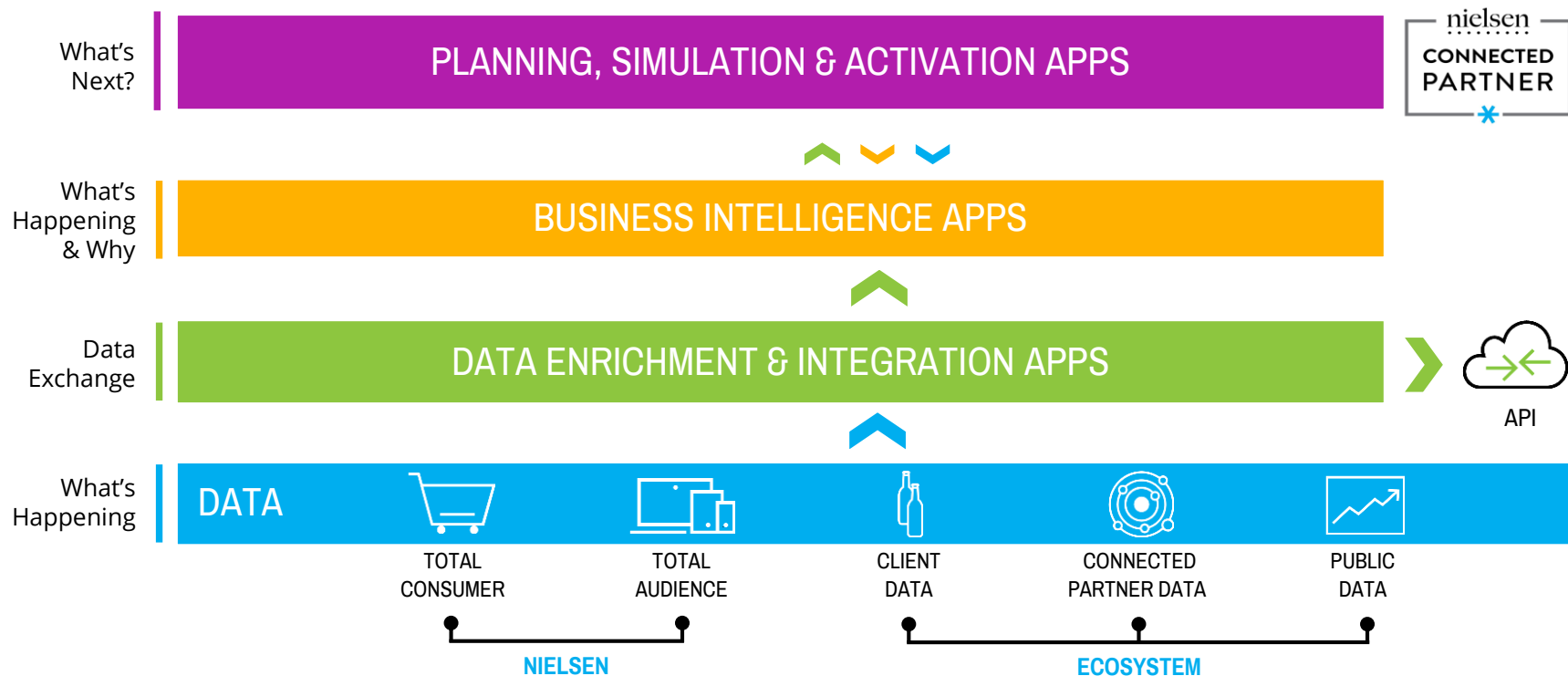


NIelsen TOTAL AUDIENCE

Plan, activate and measure with confidence.



OUR SINGLE, GLOBAL, OPEN SYSTEM



NIELSEN MARKETING CLOUD- WHAT IT ENABLES FOR OUR CLIENTS

Improves marketing effectiveness across the digital marketing lifecycle.

BUILD & SHARE OMNICHANNEL PLAN

Campaign Planning
Customer Profiling
Deep Consumer Insights



Media Planners



Creative Professionals



CUSTOMIZE & SYNDICATE SEGMENTS

Data Management
Custom Segmentation
Cross-Device Frequency Capping
Real-Time Activation



Digital Marketers

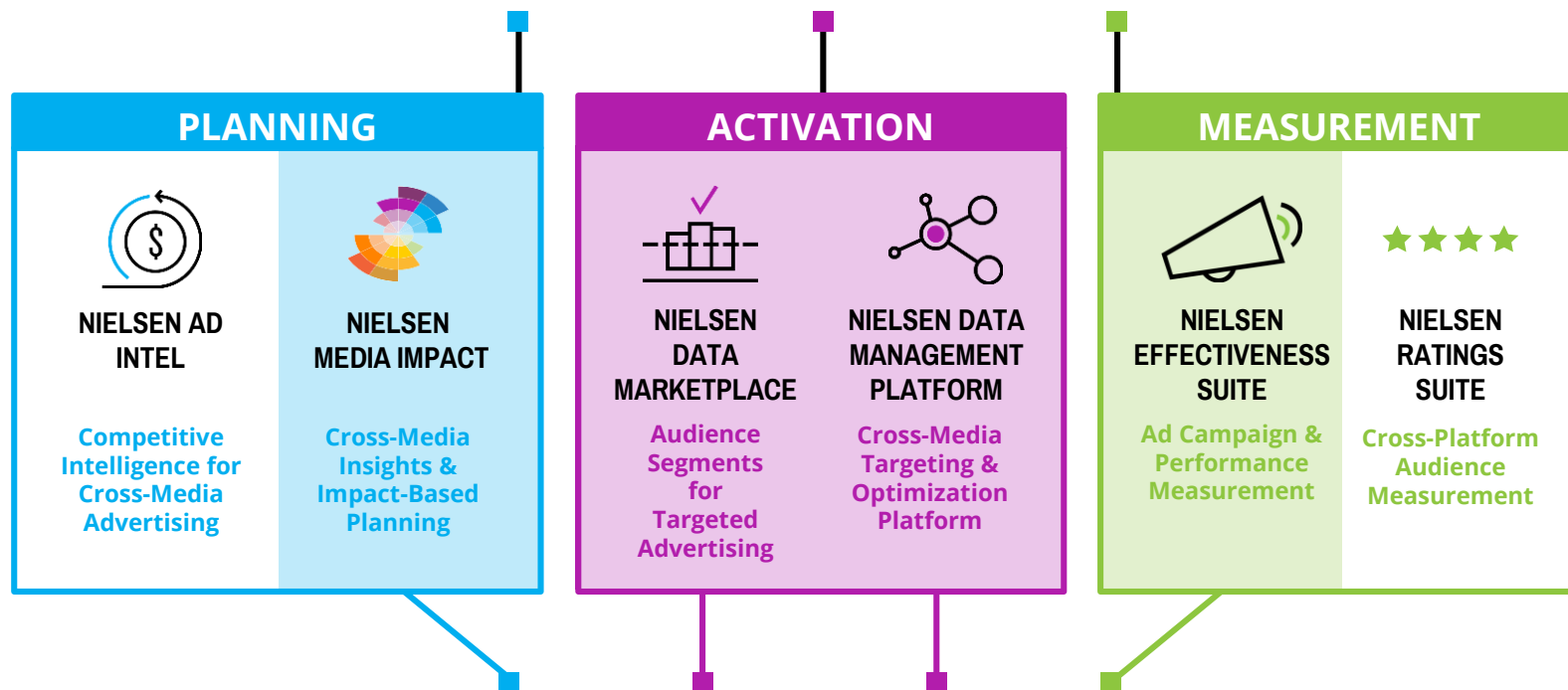
ANALYZE & OPTIMIZE RESULTS

Multi-Touch Attribution (MTA)
In-Flight & Sale Lift Analysis
Reach & Frequency Analysis
AI-Powered Optimization



Data Analysts

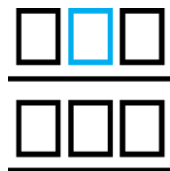
NIELSEN TOTAL AUDIENCE



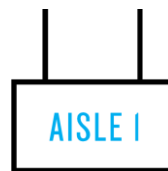
NIELSEN MARKETING CLOUD

BETTER EXPERIENCE FOR SHOPPERS & MORE SALES FOR YOU

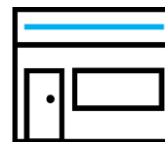
PRODUCT ASSORTMENT



PRODUCT PLACEMENT



IN-STORE EXPERIENCE



RECOGNITION & RELATIONSHIPS

RETAIL PARTNERSHIPS

- **70%** of the top 50 retailers prefer Nielsen.
- We have been engaging with retailers for **more than 20 years**.
- We have over **200+** specialists on site at **200+** retailers.



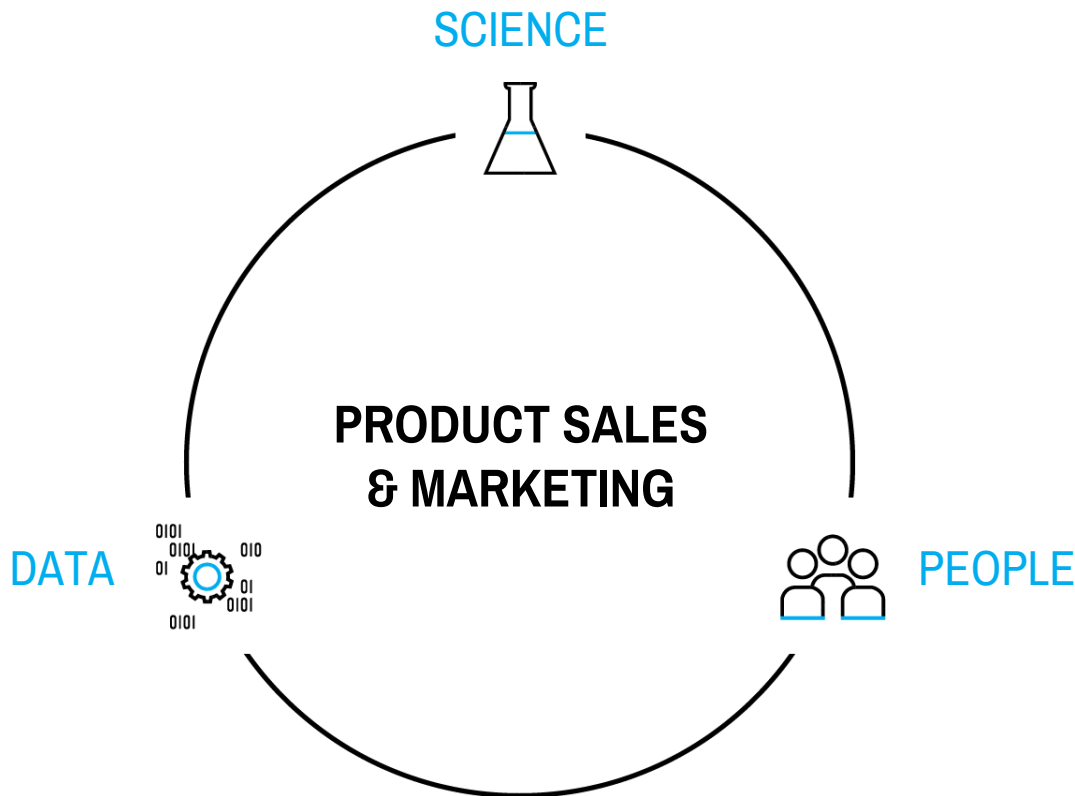
UNLEASH THE POWER OF YOUR NETWORK

48

PARTNERS
GLOBALLY



BETTER PERFORMANCE ACROSS THE LIFECYCLE OF YOUR PRODUCTS



SEAMLESSLY ALIGN AROUND CORE CHALLENGES

Key business challenges we can help you solve.



**STAY AHEAD OF
EMERGING TRENDS**



**ONE-TRUTH DATA
DEMOCRATIZATION**

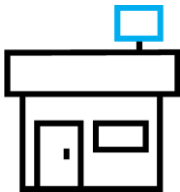


**SPOT & DIAGNOSE
PERFORMANCE GAPS**



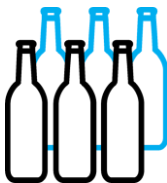
**SEE YOUR BIGGEST
OPPORTUNITIES & TAKE
ACTION**

FOUR DIMENSIONS FOR ANALYSIS



MARKETS

Total US
Channel (Food, Drug)
Geography (Atlanta)
Retailer Account (Walmart)



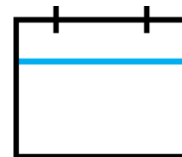
PRODUCTS

Department
Category
Brand
UPC



FACTS

Volume & Share
Distribution
Price
Promotion



PERIODS

Weeks
Months
Years

NIELSEN COVERAGE & CHANNEL DEFINITIONS

xAOC (Expanded All Outlet Channel)

Food Channel

Projects to all Grocery Stores \$2 Million+ annual ACV
Includes projections for Natural Foods retailers such as Whole Foods, Trader Joes, as well as discount grocers such as Aldi

Drug Channel

Projects to all Chains + Independents \$1MM+ annual ACV
(ACV includes Rx)

Select Mass Accounts

Target + Kmart + ShopKo

Walmart

Division 1 + SuperCenters + Neighborhood Markets

Select Club Accounts

Sam's + BJ's
Does NOT include Costco

Select Dollar Accounts

Dollar General + Family Dollar + Fred's Dollar
Does NOT include Dollar Tree or 99Cent Stores

Select Military Accounts

DECA (Defense Commissary Agency) only
Does NOT include AAFES (Army Air Force Exchange Svcs), MCX (Marine Corp Exchange) nor NEXCOM (Navy Exchange Command)

Other

Convenience Channel

Not included in FDM or xAOC unless implicitly stated (i.e., xAOC + Cstr)

Liquor Channel

Not included in FDM or xAOC unless implicitly stated (i.e., xAOC + Liquor)

Account Level Service (ALS) Only

Military Exchanges, Pet, Cash & Carry

Beauty Cross Channel Monitor

Collaboration with NPD to measure Mass & Prestige Beauty

On Premise - BevAI

Collaboration with CGA to measure on premise drinking

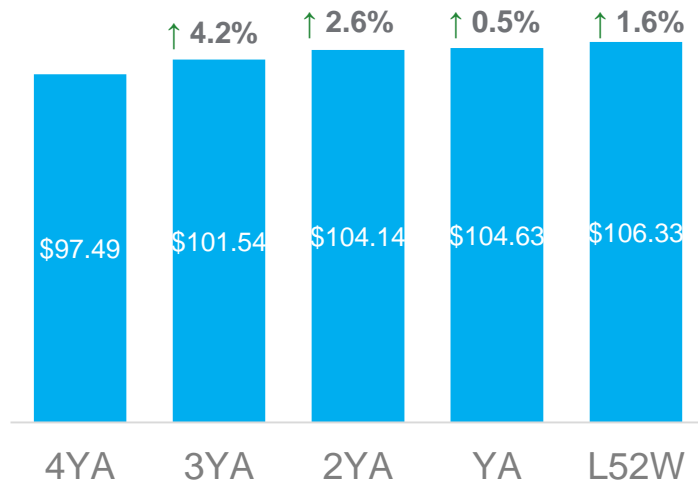
The background of the slide is a solid blue color with a pattern of continuous, flowing, wavy lines that create a sense of depth and movement, resembling ocean waves or a topographical map.

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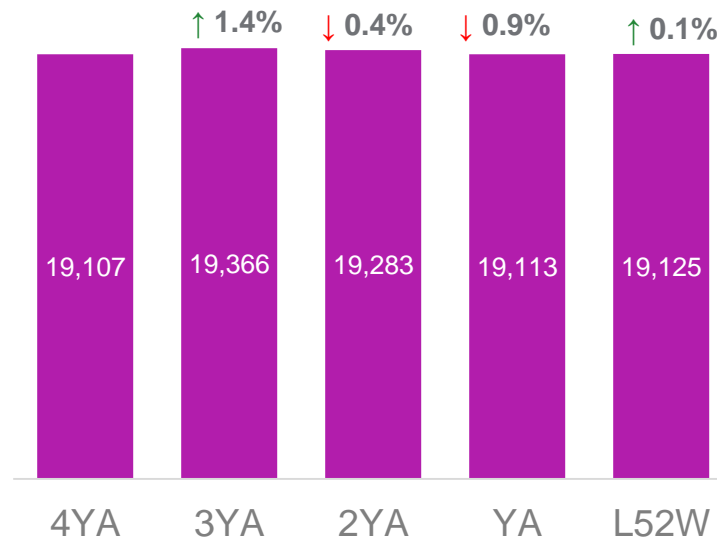
NACDS INSIGHTS

CUSTOM NON-FOOD HAS SEEN CONSISTENT DOLLAR GROWTH BUT INCONSISTENT UNIT PERFORMANCE

TOTAL CUSTOM NON-FOOD (in Billions)

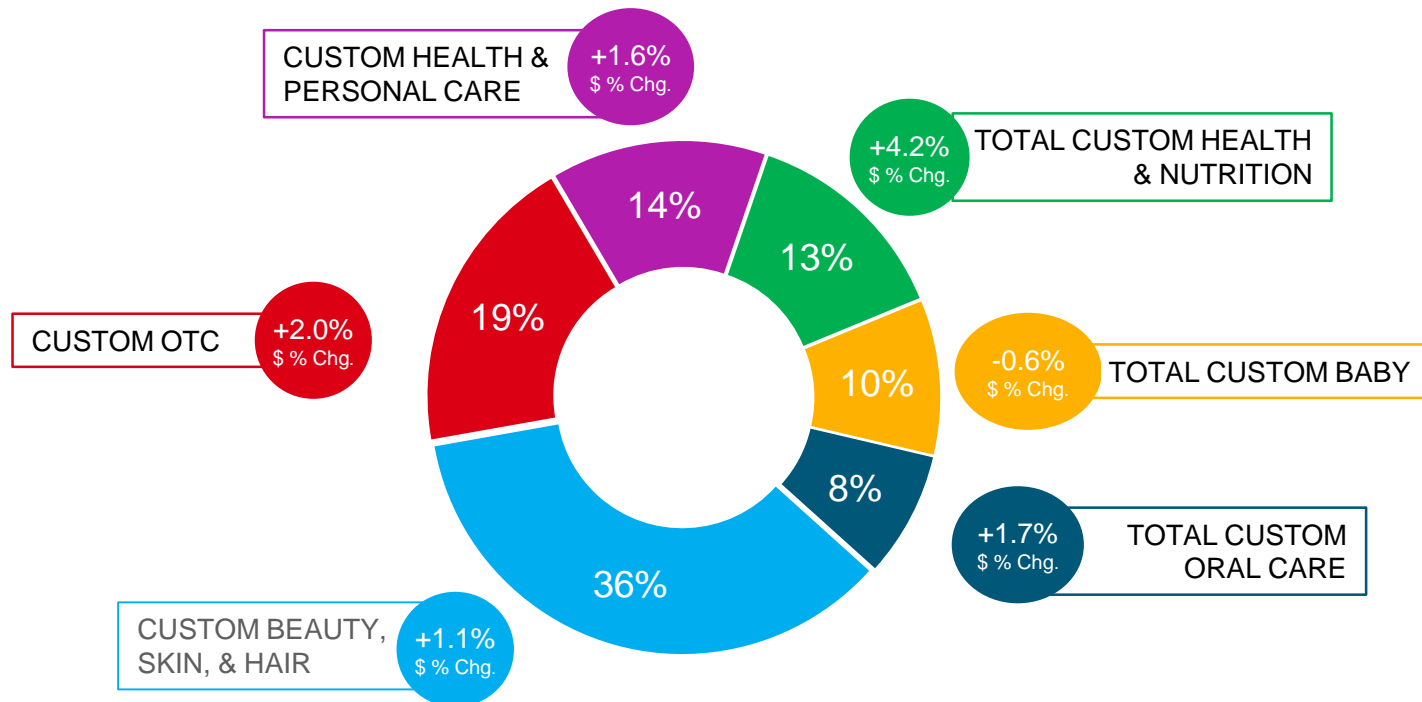


TOTAL CUSTOM NON-FOOD (in Billions)



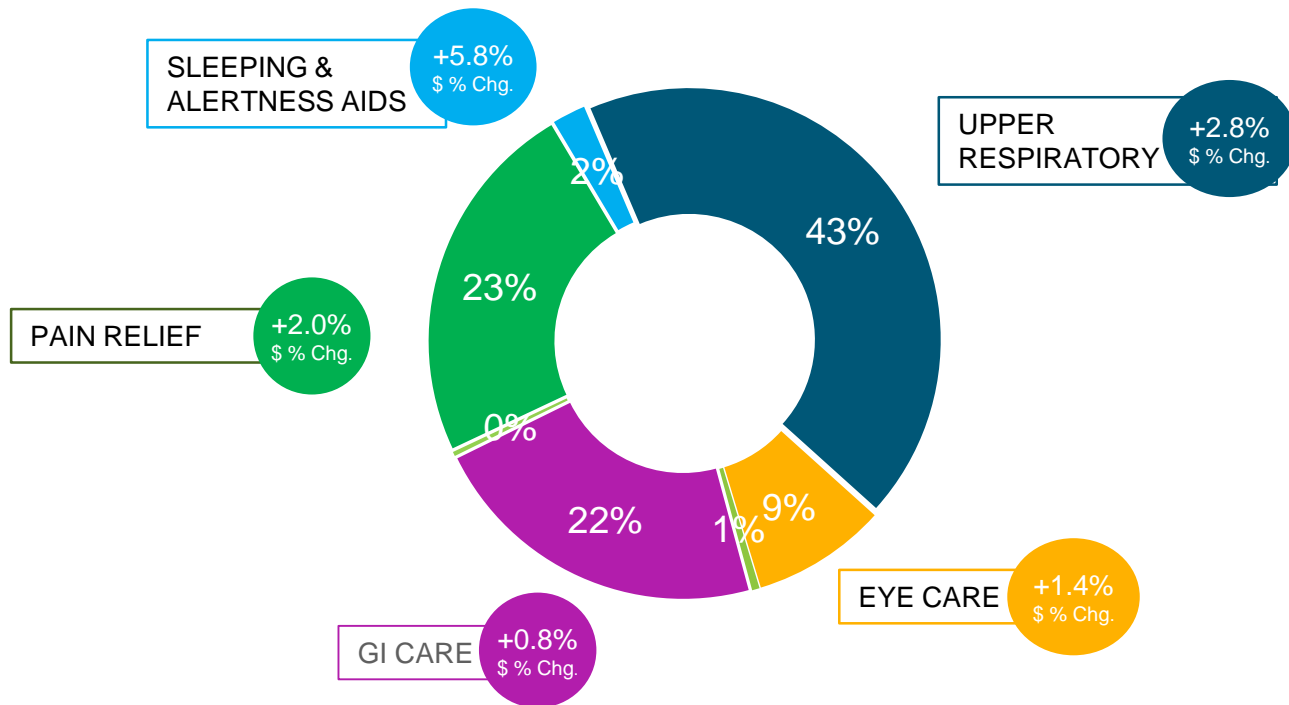
HEALTH & NUTRITION LEADS NON-FOOD IN DOLLAR VOLUME GROWTH

TOTAL CUSTOM NON-FOOD IS A \$106.3B BUSINESS (+1.6%) vs YA



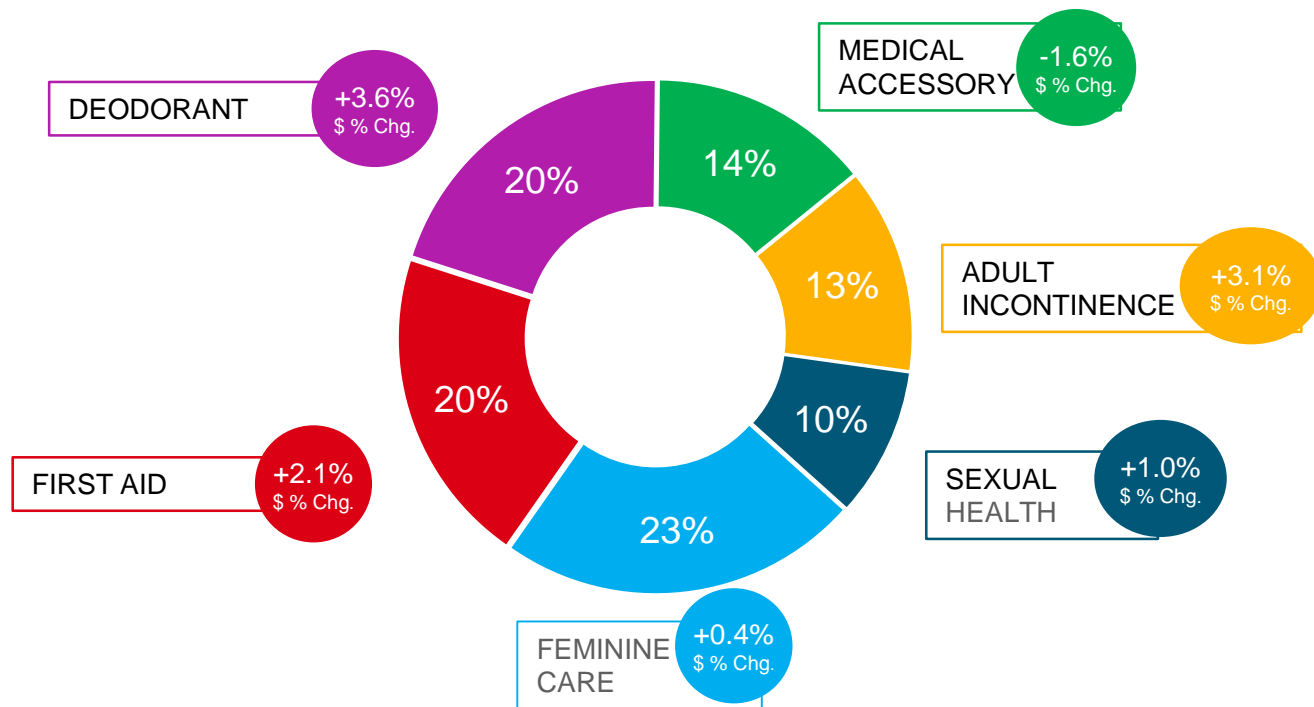
OTC DOLLAR VOLUMES CONTINUE TO GROW YEAR-OVER-YEAR

TOTAL CUSTOM OTC IS A \$20.5B BUSINESS (+1.9%) vs YA



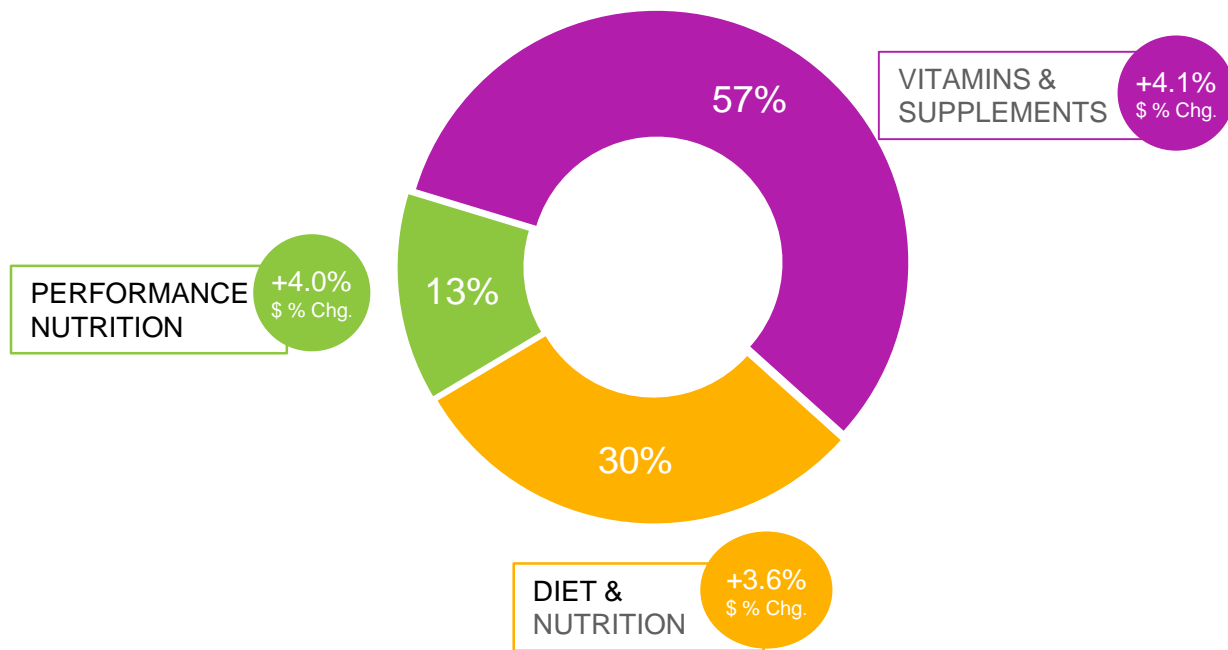
CUSTOM HEALTH & PERSONAL CARE GROWTH IS BEING FUELED BY DEODORANT AND FIRST AID

TOTAL CUSTOM HEALTH & PERSONAL CARE IS A \$14.5B BUSINESS (+1.5%) vs YA



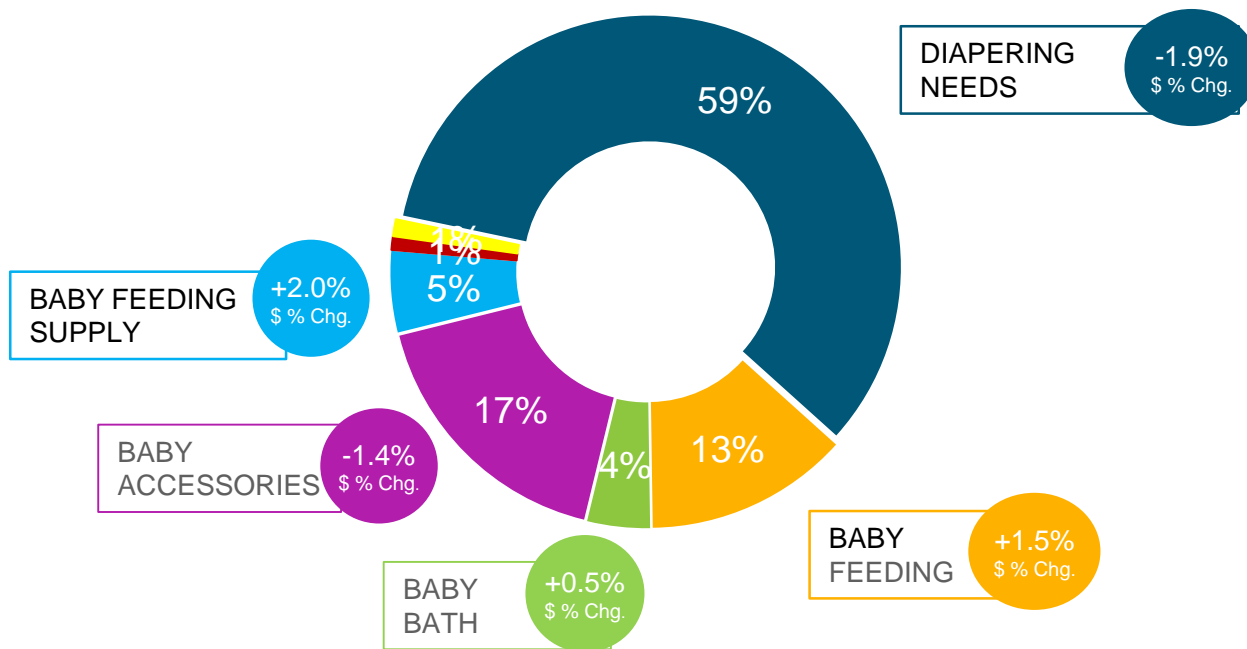
VITAMINS AND SUPPLEMENTS ARE A KEY AREA OF GROWTH FOR THE HEALTH & NUTRITION CATEGORY

TOTAL CUSTOM HEALTH & NUTRITION IS A \$14.3B BUSINESS (+4.0%) vs YA



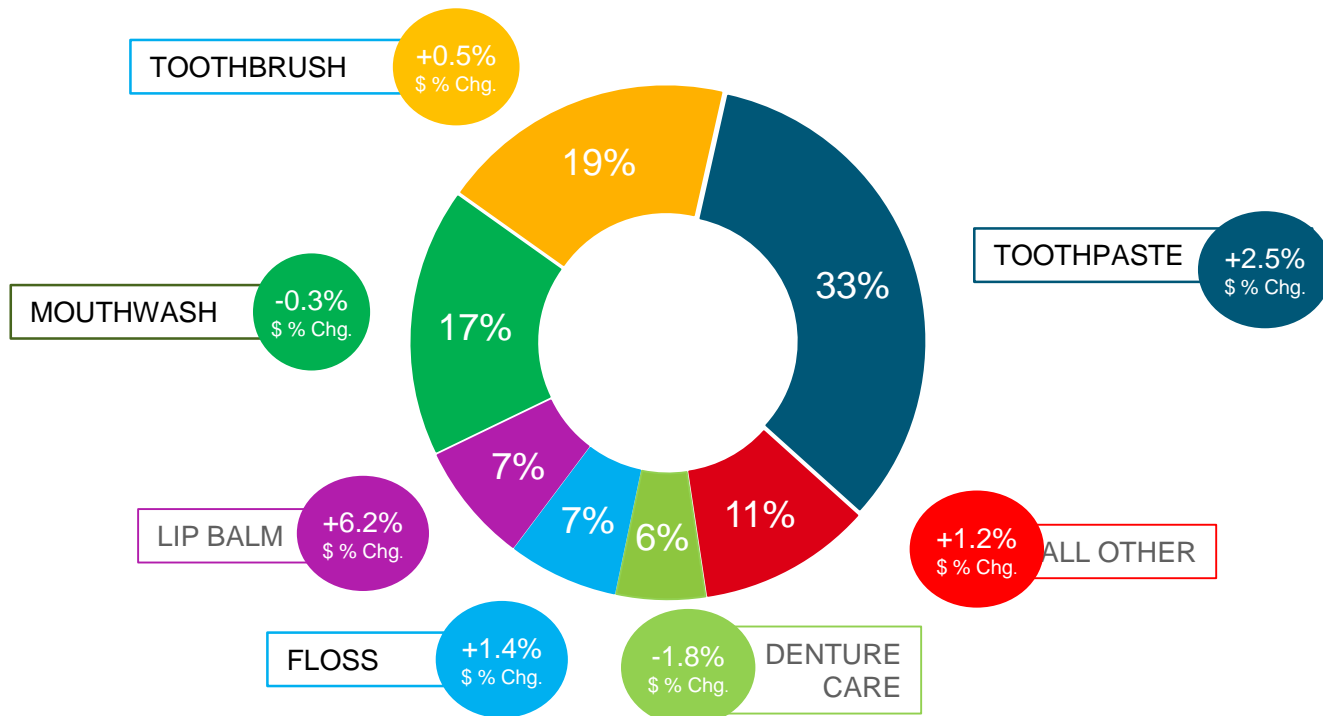
TOTAL CUSTOM BABY DOLLAR VOLUMES CONTINUE TO EXPERIENCE OVERALL DOLLAR DECLINES

TOTAL CUSTOM BABY IS A \$10.5B BUSINESS (-1.2%) vs YA



ORAL HYGIENE DOLLAR VOLUMES CONTINUE TO GROW YEAR-OVER-YEAR

TOTAL CUSTOM ORAL HYGIENE IS A \$8.5B BUSINESS (+1.6%) vs YA





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