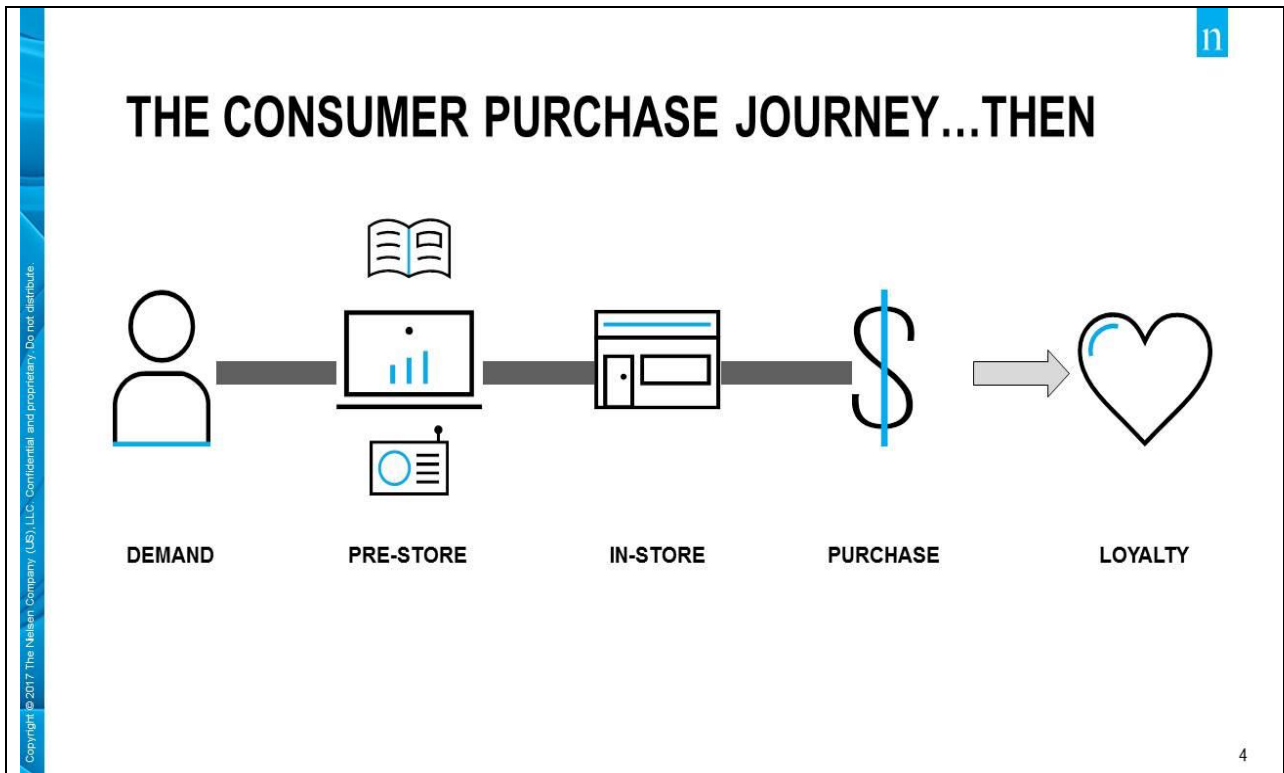


Retail & The Consumer Lens

 **RESEARCH SUMMIT ON
DEMENTIA CARE**
Building Evidence for Services and Supports

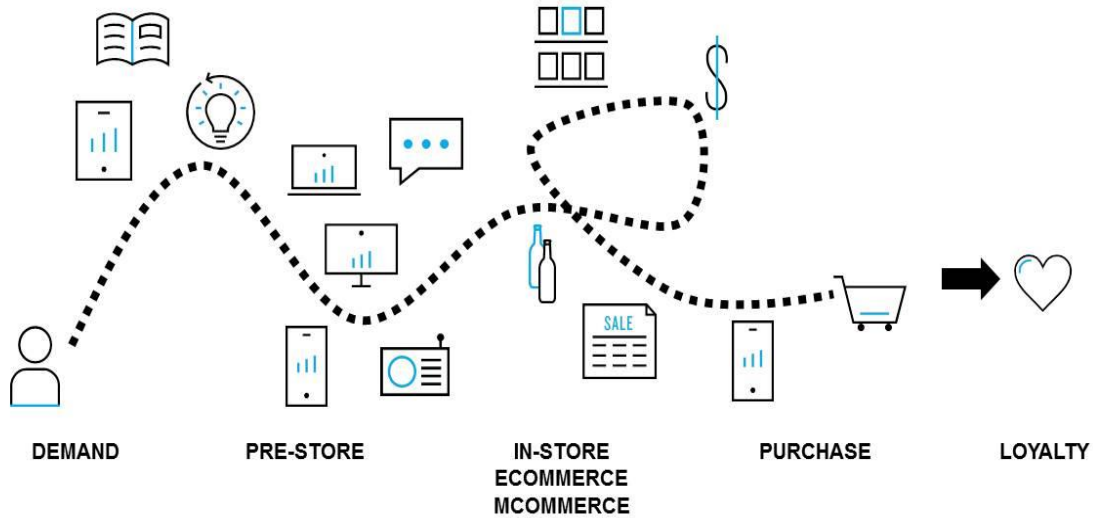
#DementiaCareSummit





THE CONSUMER PURCHASE JOURNEY... NOW

TODAY'S SHOPPER JOURNEY IS FRAGMENTED



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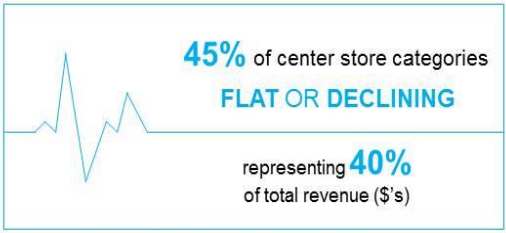
UNPRECEDENTED TIME OF CHANGES AND CHALLENGES



~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



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%)**

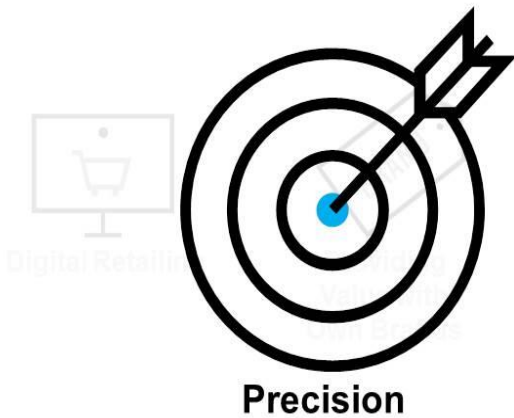
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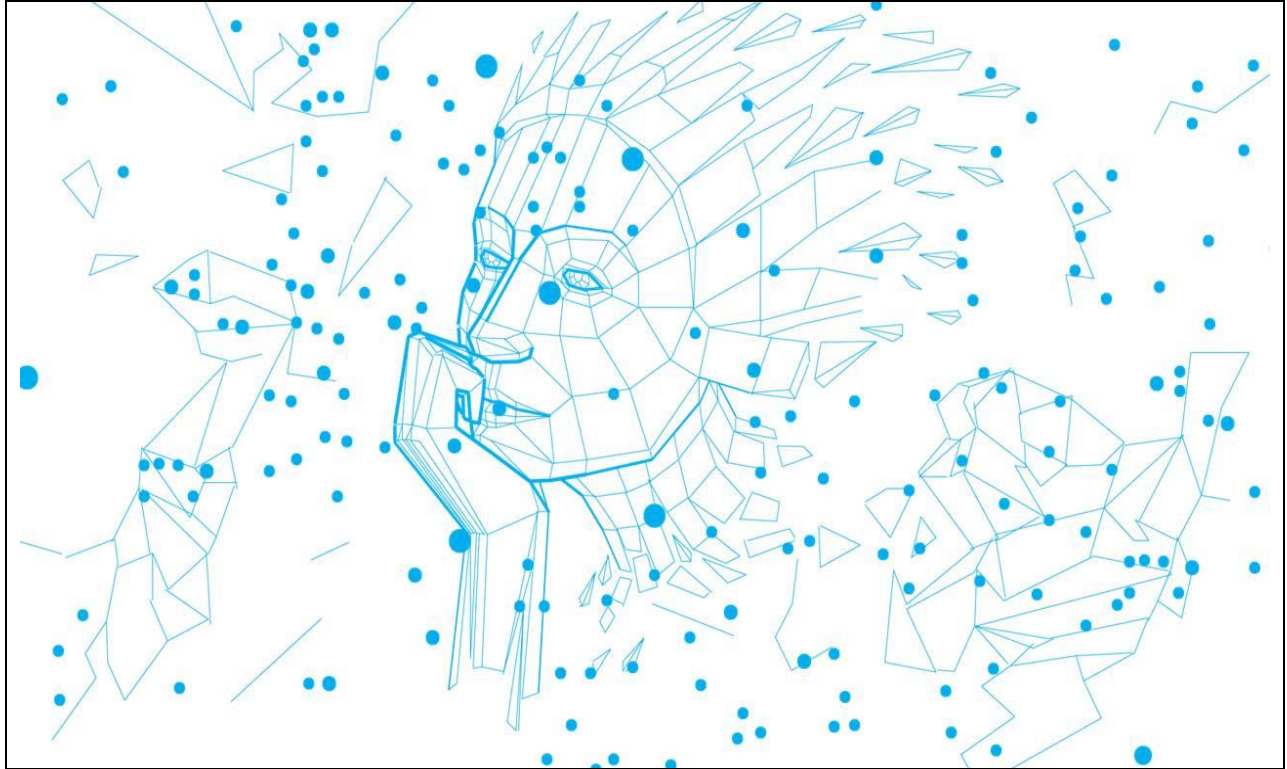
Sources: Nielsen Strategic Planner & Nielsen Convenience Planner, Total U.S. – All Outlets Combined (plus Convenience), 52 W/E 12/25/10 (% change vs. year ago); Nielsen Answers, Total U.S. – All Outlets Combined (plus Convenience), 52 W/E 01/05/13, 01/04/2014, 01/03/15, 01/02/16, and W/E 12/31/16 (% change vs. year ago); Bureau of Economic Analysis and Labor Statistics 2016, The Dialogic Group LLC

CONSUMER TRENDS FUELING RETAIL STRATEGIES

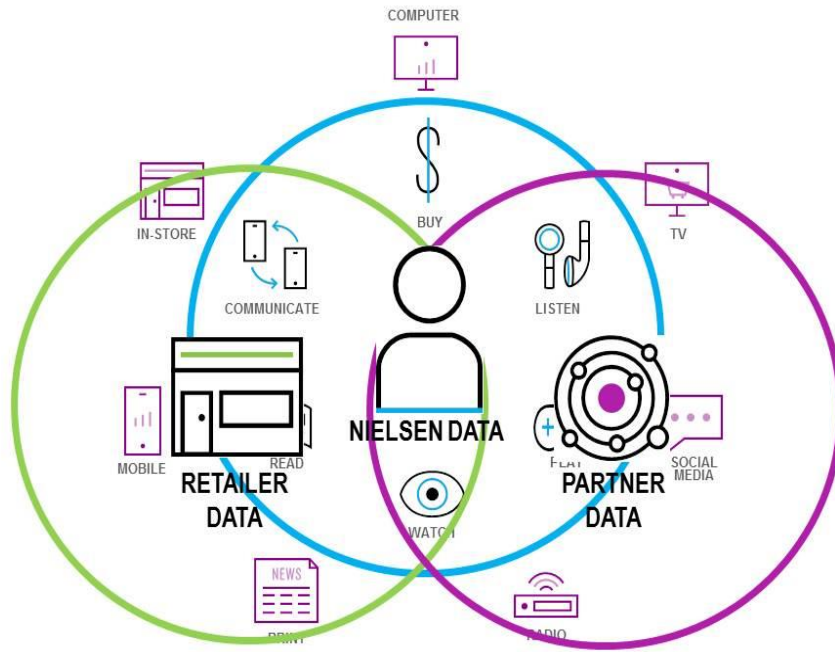


BUT WINNING RETAILERS FOCUSED ON...





NIELSEN MAKES SENSE OF THE CONSUMER'S WORLD n



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HARMONIZING DATA, ANALYTICS & TECH

RESULTING IN MORE INTELLIGENT DECISION MAKING

ANALYTICS
Always-on journey analytics & attribution

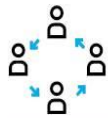


DATA
Unmatched assets across all buying & engagement channels



TECHNOLOGY
Next generation & artificial intelligence

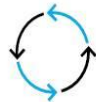
SUMMARY



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

