



nielsen

# GLOBAL CONNECTED COMMERCE

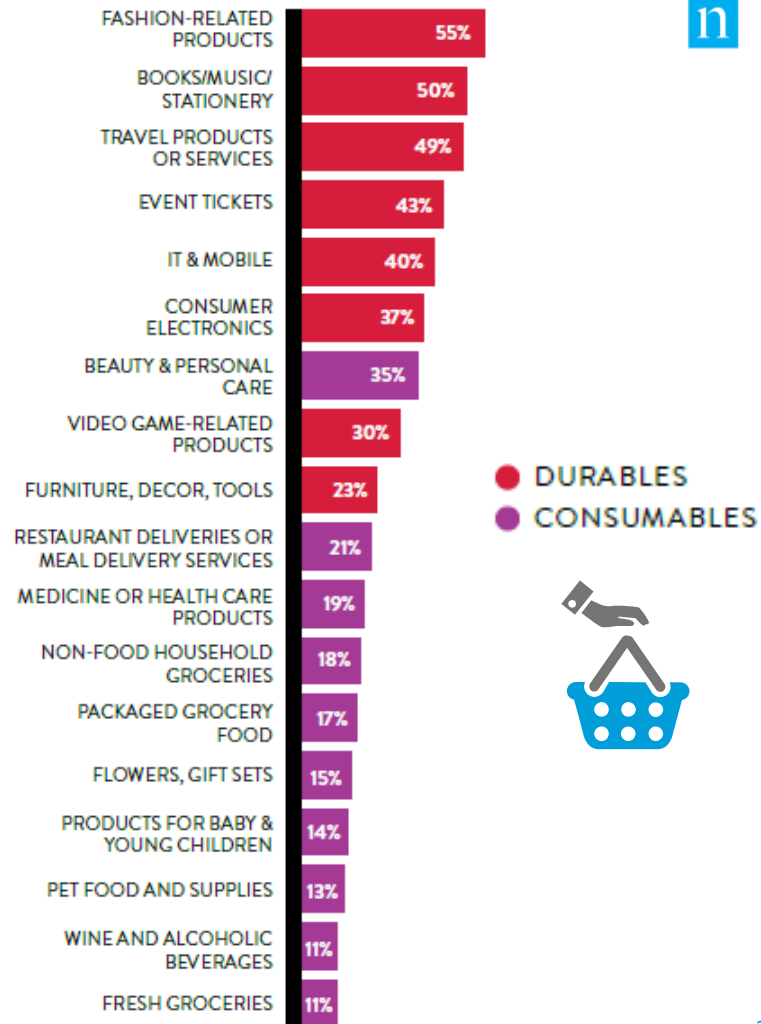
CONSUMER PURCHASING IN TODAY'S DIGITAL ECONOMY

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# ONLINE SHOPPING HAS EXPANDED BEYOND DURABLE GOODS, AND SHOWING RAPID GROWTH

Global average: Percentage who have ever purchased the category online



# TOP MOTIVATORS FOR BUYING ONLINE



53%

## CONVENIENCE

Reducing time and effort spent shopping



50%

## INFORMED DECISION MAKING

Getting information and reviews to help make better choices online & offline



49%

## DEAL SEEKING

Finding the best price possible



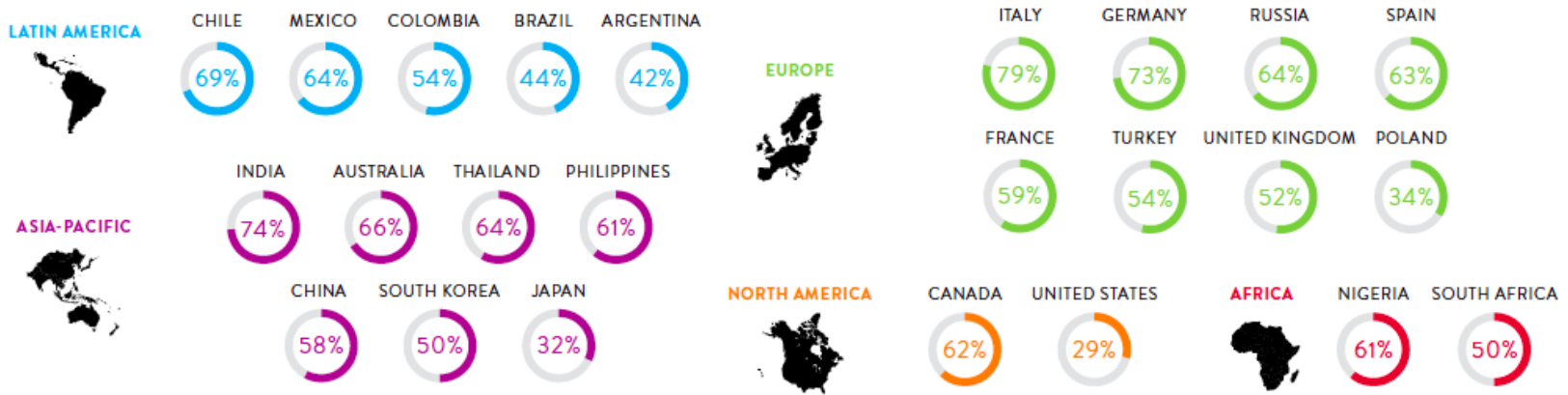
49%

## PRODUCT ASSORTMENT

Gaining access to more choices than available locally

# CONSUMERS ARE BUYING ACROSS BORDERS IN TODAY'S CONNECTED MARKET PLACE

Percentage of online shoppers who said they have purchased from overseas retailer in the past six months



# IN TODAY'S RETAIL ENVIRONMENT...



**Consumers are increasingly better informed** about what and where to buy



It's not about online versus offline retail outlets, but how they compliment each other through the **Omni-channel shopping experience**



**Connected Commerce requires local market management and infrastructure** to support global growth

## ABOUT THE NIELSEN CONNECTED COMMERCE SURVEY

The Nielsen Global Connected Commerce Survey was conducted between August and October 2015 and polled more than 13,000 consumers in 26 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample for all countries except Saudi Arabia and United Arab Emirates includes Internet users who agreed to participate in this survey and has quotas based on age and sex for each country. It is weighted to be representative of Internet consumers by country. Because the sample is based on those who agreed to participate, no estimates of theoretical sampling error can be calculated. However, a probability sample of equivalent size would have a margin of error of  $\pm 0.9\%$  at the global level.

This Nielsen survey is based only on the behavior of respondents with online access. Global and regional averages used in this report are based on weighted country data. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60% Internet penetration or an online population of 10 million for survey inclusion.

In Saudi Arabia and the United Arab Emirates, a face-to-face methodology was used for nearly 1,000 respondents. Given the differences in methodologies used, results from the Middle East are not included in the global average.

# COUNTRIES INCLUDED IN THE SURVEY

Country and Internet penetration

## ASIA-PACIFIC

China	50%
India	30%

## SOUTHEAST ASIA AND THE PACIFIC

Australia	93%
Japan	91%
Philippines	43%
South Korea	92%
Thailand	56%

## LATIN AMERICA

Argentina	80%
Brazil	58%
Chile	72%
Colombia	59%
Mexico	49%

## EUROPE

### Western Europe

France	84%
Germany	88%
Italy	62%
Spain	77%
U.K.	92%

### Eastern Europe

Poland	68%
Russia	71%
Turkey	60%

## NORTH AMERICA

Canada	93%
U.S.	87%

## AFRICA

Nigeria	51%
South Africa	48%

## MIDDLE EAST\*

(NOT INCLUDED IN GLOBAL AVERAGE)

Saudi Arabia	67%
UAE	96%

\*Note: All countries in the survey used an online methodology except the Middle Eastern countries, which used a face-to-face methodology  
Source: Internet World Stats, November 30, 2015

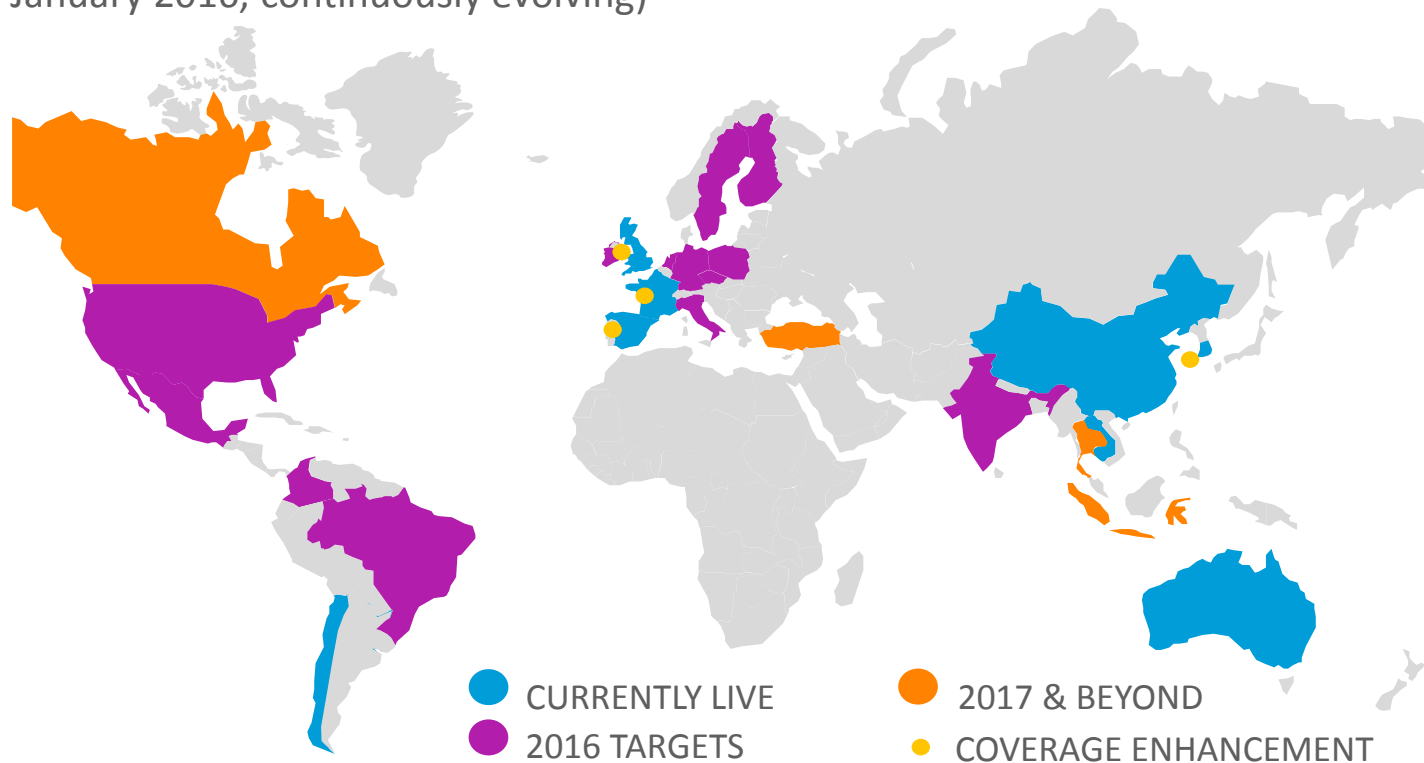
An abstract graphic on the left side of the slide. It features a series of curved lines that form a cone-like shape, tapering towards the left. The lines are colored in a spectrum including yellow, green, cyan, blue, and magenta. Several small, solid-colored dots (yellow, green, magenta, red) are placed at various points along these lines, with thin lines extending from them towards the right, suggesting data points or connections.

# ECOMMERCE SALES MEASUREMENT



# NIelsen CONSUMER GOODS ECOMMERCE MEASUREMENT

Coverage in 8 markets\* & cooperation with 100+ retailers today  
(\*as of January 2016, continuously evolving)



# ALMOST 150 COOPERATING RETAILERS GLOBALLY

And growing as we gain cooperation

A.Mart	Aeon	AiYingshi	Albert Heijn	Alcampo Online	ALIMERKA	ASDA	Auchan Drive	Books	Boots	Caprabo Super Online
Carrefour Drive	Carrefour Total	Casino Drive	Chronodrive	Coles	Condis Online	Cora Drive	Course U Drive	CVS	Dia Online	Eci Hipercor Online
Eci Online	emart	Eroski Online	Fairway NY	Festival Foods	Fresh & Easy	GADISA	GoHappy	GS isuper	Hepsiburada	Hermanos Martin
Homeplus	Homevv	Indiatimes	Jiffstore	Lazada SE Asia	Le Drive Intermarché	Leclerc Drive	Lijja baby	Lottemart	Lottesuper	Lowes Foods
Mama's goodbaby	Meijer	Mercadona Online	Momo	Muyingzhijia	nsmall	Ocado	ParkNshop	Peapod	Petco	Petsense
Red baby	Rediff Shopping	Rite Aid	Sabeco Online	Safeway	Sainsbury's	Sam's Club	Save&Safe	Sears/Kmart	Shopclues	Superdrug
Takealot South Africa	Tesco	Townessentials	TUDESPENSA .COM	Ulabox	Waitrose	Wakefern	Walmart Canada	Walmart Mexico	Watsons	Watsons
			Watsons	Wellcome	Wilkinson	Yahoo Taiwan	Yihaodian			

# MARKET LAUNCHES DRIVEN BY RETAIL COOPERATION

## Cooperation first; Defined universe method

- 1<sup>st</sup> preference is e-commerce market
- 2<sup>nd</sup> preference is key account
- 3<sup>rd</sup> preference is coverage add
- 2 Key account today – Netherlands and Turkey with South Africa next

## Projection

- China first market; Korea now exploring

## Consumer data

- US is proof point on consumer sourced data
- UK and India are next 2 key markets to add in additional Consumer data

E-commerce Market			Total Coverage		
Country	Total # of Cooperators	# of 2015 Cooperators	Country	Total # of Cooperators	# of 2015 Cooperators
Spain	15	3	Columbia	15	0
China	10	2	UK	9	0
France	9	4	Canada	8	0
Korea	7	2	Hong Kong	4	0
Chile	4	0	Australia	1	0
Turkey	1	1	Brazil	5	0
Netherlands	1	0	Germany	1	0
United States	14	1	Total	43	0
India	10	6			
Sweden	8	0			
Taiwan	7	1			
Thailand	3	2			
Mexico	3	0			
Hungary	2	1			
Singapore	1	1			
South Africa	1	1			
<b>Total</b>	<b>96</b>	<b>25</b>			

# MEASURING THE DIGITIZED PATH TO PURCHASE

★ Sales Measurement

Overlapping measurement types plus match & model, to enable digital activation

## Retail & Consumer Panels



Shopper and market performance driven from multiple Nielsen panels and purchase tracking methods

## Marketing Effectiveness

Activating against precise purchase based audience segments, link to Resonance and Reaction



## Digital Strategy Development

The Cambridge Group constructs digital business strategies for our clients

## Online & Mobile Behavior

## Innovation and Shelf

Measuring application & website usage along the Path to Purchase using Nielsen panels and 3<sup>rd</sup> party data

Innovation, product content, assortment and merchandising

# TOTAL CONSUMER - E-COMMERCE MEASUREMENT

Using Point of Sale Data from cooperating retailers and Consumer Sourced data to launch a Total CPG e-commerce view ***U.S. INPUTS EXAMPLE***

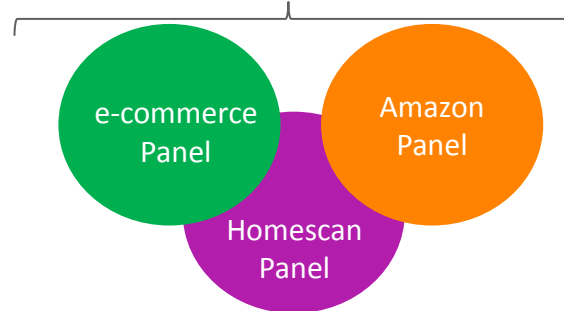


## e-commerce POS retailer data

Ecommerce cooperators across Food, drug, mass, club, pet, and pure play



## Consumer Sourced for non-cooperating retailers



- Defined universe of 100+ retailers
- Account level release when available (varies by co-op versus non-co-op)
- Category, manufacturer, brand
- Volumetric facts
- Monthly reporting
- Nielsen deliverables



## Total Consumer Packaged Good e-commerce coverage

Additional sources over time:

- Financial
- Clickstream
- Shelf Integration
- Marketing activation
- Consumer Insight

A decorative graphic on the left side of the slide, consisting of a dense grid of thin, curved lines in various colors (red, green, blue, yellow) that converge towards the top left. Several small dots in the same color palette are scattered across the lines.

## THANK YOU

For more detail on full individual country results from the  
Connected Commerce study visit

<http://store.nielsen.com/ecommerce>

for general questions on ecommerce measurement or otherwise,  
contact [Carlina.Johnson@nielsen.com](mailto:Carlina.Johnson@nielsen.com)