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http://www.nielsen.com/consumer_insight/ci_story1.html

The Online and In-Store Crossover Conundrum:

Pinpointing the Value of Multi-channel Behavior

By: Ken Cassar, VP, Industry Insights, The Nielsen Company

CI SUMMARY: Consumers have embraced cyberspace as a viable medium to compare prices, learn about products and read consumer reviews. But how can marketers turn opportunities to see into opportunities to sell. Clearly in-store and web channels complement each other, but striking a balance between the two have become serious table stakes for successful retailers.

Fast and easy. At today's frenetic pace of life, these two attributes speak loudly to the consumer mindset and garner instant appeal. And with good reason. In today's digital age of consumer control, where information is shared across the globe at the speed of light, consumers have come to expect instant gratification. Truly, with the click of a mouse, knowledge is shared, opinions are given, relationships are built, and products are purchased—from anywhere and at anytime. And while consumers have embraced cyberspace as a viable medium, there is a fine line between balancing the desire for speed and convenience with the practical need to grow sales and profitability when it comes to viral brand marketing.

To buy or not to buy—online that is

Like peanut butter and jelly, cookies and milk, or bread and butter, some combinations are just meant to go together. Such is the case when you link "high-consideration" categories like consumer electronics with online shopping. Arming the consumer with enough product information to make an instant expert, the Internet not only quenches the thirst for knowledge, but it satisfies the desire to buy too.

In fact, a recent Nielsen Online MegaPanel survey revealed the reasons why consumers would rather buy a consumer electronics product online than in a local store. And price is a main driver. Over two-thirds of consumers say that they could get a better price online than in a local store and fully half believe it is easier to compare prices online. Other reasons cited include: getting convenient at-home delivery (45%), comparing retailers (41%), choosing from a much broader selection (40%), accessing more product information (40%), and reading consumer reviews (37%).

Why consumers would rather buy a consumer electronics product online than in a local store...

On the other hand, "low-consideration" categories, such as consumable products like pet food, do not hold the same online purchasing appeal. In fact, the reasons *not* to buy pet food online win out by an overwhelming 91% majority. Among the reasons why consumers would not buy pet food online, a motivating factor for over two-thirds of respondents was the high shipping and handling prices. Longer wait time (57%), high online prices (16%), being at home for the delivery (15%), and difficulty in redeeming coupons (12%) were also concerning.

Check-out considerations

Interestingly, while consumers cite numerous reasons to buy "high-consideration" categories online, when it comes to check-out, they are actually two times more likely to make a consumer electronics purchase in the local store (59%) rather than online (31%). The most common reason cited by 58% of respondents was the ability to physically evaluate the product before making the purchase.

In High-Consideration Categories, Offline Purchase is Nearly Twice as Likely as Online

Source: Nielsen Online MegaPanel survey, May 2008

Click image to expand

Multi-channel shoppers are big spenders...

But, whether consumers buy online or in-store, multi-channel shoppers are big spenders. In fact, Nielsen found that consumers who shop both online and offline are the most valuable. Looking across a mix of brick and mortar retail channels, multi-channel shoppers spend 57% more at CVS, 61% more at Walgreens and Costco, 38% more at Walmart and 37% more at Sam's when compared with the average spending of consumers who exclusively shop online or only shop offline.

Complementary cohorts

Nothing is quite like the actual in-store experience for some products—the ability to physically evaluate a product or speak to a knowledgeable salesperson can literally make or break a sale. On the other hand, the convenience of visiting a much broader selection of virtual retailers to compare and contrast pricing and capabilities without ever leaving home is, well, simply priceless.

Clearly in-store and Web channels complement each other...

Clearly in-store and Web channels complement each other—the combination of the two has absolutely become table stakes for successful retailers. In fact, Nielsen found that 80% of consumers actually purchased a consumer electronic product from a local store whose web site they visited as they were doing research online. Striking a balance between online and in-store can lead to a big payoff.

The source of choice

Perhaps for a "high-consideration" category like consumer electronics, it is no surprise that the Internet is the source of choice for 58% of consumers if they were only able to use one resource to support their next purchase. A visit to the local store trailed way behind as the singular option for 25% of consumers. However, in the case of a "low-consideration" category like pet food, where 44% of buyers visit the web site to learn about food or issues related to pet food, it is important for marketers to understand how to employ an active crossover strategy by engaging the consumer more successfully online.

And unlike consumer electronic buyers where price is the motivating factor for going online, 48% of pet lovers are more interested in learning about nutritional specifications. Learning about product ingredients and recalls were a close second for 45% of pet food buyers. Other factors include learning about safety issues and finding sales and promotions (40%), evaluating and comparing prices (36%), finding a local store (25%) and reading consumer reviews (16%).

Learn from the best

Some retailers are making the most of their web sites as a destination source to engage consumers. Best practices include Safeway's printable recipes linked to shopping lists, Best Buy's in-store inventory availability check, Walmart's *site-to-store* free shipping option, Lowe's "how-to" content information, and Kraft Foods' recipe availability from six different downloadable platforms.

Offering great product- and category-level content is the critical foundational element to make multi-channel retailing most successful. Key pieces of content must be portable and enable easy printing. Making it accessible via mobile and in-store devices is a plus. The bottom line is this: give consumers a multitude of ways to reach your product and remain agnostic regarding in which channel the ultimate purchase is made. In doing so, you not only build customer loyalty, but you boost the bottom line as well.

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http://www.nielsen.com/consumer_insight/ci_story2.html

Cross-Media Brands:

Connecting with Consumers Across Media Platforms

By: Pete Doe, Managing Director, Nielsen Connections and
Glenn Enoch, VP, Audience Research, ESPN

CI SUMMARY: Sports fans can access ESPN in a variety of ways: TV, Internet, mobile, radio and print. Although currency data exist for the different media, ESPN needed to understand how fans navigate from platform to platform. The best way to rich, comprehensive insights about sports fans was to take an approach that combined two methods—single source hot-house and fused media databases. Turns out that two sources really are better than one.

ESPN's mission statement "to serve sports fans wherever sports are watched, listened to, discussed, debated, read about or played," needed to be quantified with research that delivered equally powerful insights to serve advertisers' need for reliable metrics. As one of the true cross-media brands, fans dial into ESPN any number of ways—via TV, the Internet, mobile devices, radio and print.

While data existed for each individual medium, exactly how ESPN fans navigated across platforms remained a mystery. In order for advertisers to fully understand the value of their investment, both in terms of singular platforms and cross-media exposures, a new lens was needed for looking across media.

A new lens was needed for looking across media...

Modeling (im)perfect

Whether you sit on the fusion or single-source side of the research model debate, both represent research methodologies, which means that they are subject to the inherent problems of data bias or error. Areas of vulnerability include sampling error, response bias, measurement issues and modeling inaccuracies in imputation, forecasting, weighting or integration.

Even so-called "pure" single-source data bases are anything but. In point of fact, they may contain more error and bias than fused data due to lower cooperation rates and less precise measurement techniques (e.g., self-reported vs. metered behavior). By using all available information, a reliable picture of behavior can be pieced together. In the case of ESPN, that meant integrating or fusing singular databases together and using the single source Nielsen Convergence Panel to validate the data fusion work, while also delivering insights not available via fusion.

A tale of two methods

Data fusion involves a process whereby media usage across a variety of platforms is integrated together. The Nielsen TV/Internet data fusion combines data from the National People Meter database of TV viewing households with the

Media usage across a variety of platforms is

Nielsen Online NetView Panel of Internet surfing households to deliver a measure of time spent and reach to sports programs and websites (including home and work use) by demographic. (*See Sidebar, Nielsen TV/Internet Fusion Data Base.*)

integrated together...

The Nielsen Convergence Panel is a non-currency panel of homes where both in-home TV viewing and in-home Internet usage are measured giving a direct measurement of the interaction between these media and providing a comparison and validation point for the TV/Internet data fusion. (*See Sidebar, Nielsen Convergence Panel.*)

Outcomes in

Initial results from the validation exercise that compared like-for-like results between the data fusion and Conversion Panel data are heartening. They indicate that the percent of people watching TV and using the Internet for shared and exclusive users are very close between the two research approaches. With results within a few percentage points of each other, the exercise proved that the fusion approach provides a reliable look across platforms for cross-media brands.

The fusion approach provides a reliable look across platforms for cross-media brands...

Topline findings suggest that about 75% of people have Internet access and virtually all households have TVs (98%). Those without Internet access tend to be older, lower income and heavier TV viewers. The heaviest Internet users also tend to be slightly heavier TV viewers. Conversely, light Internet users also tend to be light TV viewers. Although these findings may seem counterintuitive, they surfaced in both the fusion and Convergence Panel data.

Watching the watchers

Initial fusion findings for ESPN and ESPN.com show that over half of Persons 2+ tune to ESPN or use ESPN.com and 5% of ESPN's combined TV-Internet audience use ESPN.com exclusively in a month. In March 2008, 123 million people accessed ESPN on TV and another 21 million clicked in through ESPN.com. Among households with either TV or Internet access, 84% opted for TV viewing, 10% used both media and 6% used ESPN.com exclusively.

Initial Fusion Findings for ESPN and ESPN.com Use—Average Month

P2+ in TV HHs	286,036,000	100%
Watched ESPN	122,713,000	43%
Used ESPN.com	20,543,000	7%
Either ESPN-ESPN.com	130,603,000	46%
P2+ Using TV or Internet	130,603,000	100%
Watched ESPN Only	110,060,000	84%
Used ESPN.com Only	7,890,000	6%
Did Both	12,652,000	10%
Did Neither	155,433,000	54%

Source: NielsenConnections (March 2008)

The more, the better

There is no mixed message from mixed media viewers. ESPN enthusiasts like their sports, and the more they watch, the more ways they watch. Sports fans who watch ESPN and use ESPN.com were heavier ESPN media users, spending 27% more time watching ESPN TV than TV-only users and 50% more time using ESPN.com than the Internet-only viewers.

The more they watch, the more ways they watch...

The "more the better" philosophy holds for the so-called three screen audience as well—those who view using television, Internet and mobile devices. Nielsen found that from May 2007 to May 2008, watching TV in the home was up 1.4%, Internet use was up 5%, while watching time-shifted TV delivered through systems like Tivo jumped 35.7%.

Overall Usage Number of Users 2+, Per Month (in 000s)

	May '08	May '07	% Diff
Watched TV in the home*	282,348	278,400	1.4%
Watching Timeshifted TV*	63,265	46,632	35.7%
Using the Internet**	161,690	154,134	5%
Watching Video on Internet**	118,673	n/a	n/a
Using a Mobile Phone^	217,076	n/a	n/a
Mobile Video Subscribers Watching			
Video on a Mobile Phone^	4,400	n/a	n/a

Source: Nielsen Three Screen Report, May 2008

* TV includes live viewing plus any playback viewing; Timeshifted TV is playback primarily on a DVR, but including playback on services like Start Over as well as playback from a DVD recorder.

** Internet figures are from home and work. Hours:minutes are based on the universe of persons who watch online video.

^ Survey results reported in April 2008, this is a Q1 2008 estimate of only those mobile subscribers that subscribe to and use video on their mobile phone, over the past 30 days.

In terms of hours, watching TV in the home for the May-to-May time period was up by 5 hours and 27 minutes; time-shifted TV increased by 2 hours and 6 minutes; and Internet use inched up equivalently, by 2 hours and 10 minutes.

Time Spent in Hours:Minutes Per User 2+, Per Month

	May '08	May '07	% Diff
Watched TV in the home*	127:15	121:48	4%
Watching Timeshifted TV*	5:50	3:44	5.6%
Using the Internet**	26:26	24:16	9%
Watching Video on Internet**	2:19	n/a	n/a
Mobile Video Subscribers Watching			
Video on a Mobile Phone^	3:15	n/a	n/a

Source: Nielsen Three Screen Report, May 2008

* TV includes live viewing plus any playback viewing; Timeshifted TV is playback primarily on a DVR, but including playback on services like Start Over as well as playback from a DVD recorder.

** Internet figures are from home and work. Hours:minutes are based on the universe of persons who watch online video.

^ Survey results reported in April 2008, this is a Q1 2008 estimate of only those mobile subscribers that subscribe to and use video on their mobile phone, over the past 30 days.

For those who phoned it in, mobile video subscribers age 12–17 watched 5 hours and 25 minutes of video per month. Those aged 18–24 accounted for 3 hours and 2 minutes of mobile video viewing. The 25–34 segment logged 3 hours and 36 minutes of mobile video time. The 35–44 and 45–54 age cohorts each accounted for 2 hours and 53 minutes of screen time. Consumers 55–64 keyed in for 2 hours and 10 minutes of mobile video watching. A slight gender skew surfaced, with women accounting for the majority of TV and Internet video viewing, while 54% of the mobile device audience was male.

Anyway they look at it, via TV, Internet, video or phone, viewers love their sports and want ready access wherever and whenever they desire.

Nielsen Consumer Insight, September 2008

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http://www.nielsen.com/consumer_insight/ci_story3.html

Defensive Branding:

How to Defend Your Brand in an Age of Consumer Control

By: Pete Blackshaw, Executive Vice President, Nielsen Online Strategic Services

CI SUMMARY: Consumer-generated media (CGM) has wrested control of brand equity and brand reputation away from companies. Defensive Branding is a methodology for regaining control of the dialogue and reaffirming brand credibility by strategically deploying digital media.

Perhaps you've heard about the Taco Bell rat invasion in New York. Or the Crest mouthwash brown spot problem. Or the Starbucks demonic icon controversy. These rumors are all products of consumer-generated media, fed by the ready availability of Web 2.0 outlets like blogs, chat rooms, YouTube and instant messaging, which provide a forum for disgruntled influencers to reach millions instantly.

Brands and brand management are under attack as social web sites like Digg and Gawker.com publish email addresses to facilitate consumer salvos of executive e-mail carpet bombs. Thanks to video sites like YouTube, the war of words has escalated, with sound and motion injecting visceral emotions into the fray. Everything gets magnified on the Web, which functions much like an echo chamber, amplifying and reiterating compliments, claims and complaints.

Everything gets magnified on the Web, which functions much like an echo chamber...

Consumer clout

Consumers, disenchanted with corporate corruption and pinched by tough economic times, are fighting back, flexing their muscle on micro-community sites, ratings and review sites, feedback portals, Internet discussion forums, Usenet newsgroups and consumer blogs to name just a few. They giga-gossip because they can. It's easy, barriers to entry are low and they enjoy the heady experience of empowerment on a global scale.

This mouthy movement traces its origins to the innate human need to matter, to be heard, to connect with others in an increasingly mechanized world. On the upside, people love to share good things and evangelize for products and services that exceed expectations. In a world of airbrushing, injections and implants, where nothing is quite what it seems, electronic media afford an authentic outlet for expression.

Moved to speak

What converts the average consumer into an avid evangelist? A 2007 Nielsen study found that almost twice as many people (55%) posted to a Web site, blog or message board because they used the product and liked it, as those who used the product and either didn't like it or wanted a refund (28%). Sometimes, they just saw a comment or posting and responded to it (27%).

When consumers read a negative story in print or see a broadcast segment, they visit the product website for additional information, segue over to Google for comprehensive coverage, then turn to Wikipedia and other consumer-generated media for a more impartial, objective point of view.

Cost and consequences

The problem with cyber contrails is that the digital footprint never disappears. It is almost impossible to completely purge a claim once it's launched into the electronic ether. At the awareness and trial stage of a product launch, the process can be interdicted by CGM at the all-important "first moment of truth." Conventional media coverage often bleeds over into CGM, influencing consumer perceptions before product trial.

Financial analysts now enjoy broader access to direct consumer input on company products and policies. Marketers lose control of key messages which are diluted and polluted by CGM messaging. Activists with a bone to pick and cause to promote can co-opt campaigns before they gain traction. Advertisers need to amp up spending to gain any share of voice in a cluttered media universe. Product line extensions enter the market saddled with the baggage of the core brand. Retail relationships change when bad news can't be managed or held back until solutions are formulated.

Activists can co-opt campaigns before they gain traction...

Brand credibility

CGM has proven particularly effective in shaping brand perceptions because it embraces the six drivers of brand credibility:

- Trust
- Authenticity
- Transparency
- Affirmation
- Listening
- Responsiveness

With the goal of creating long-term customers, classic marketing efforts build from awareness through advocacy, a state of commitment where loyal consumers would encourage others to share the experience. As a result of Web influence, this traditional "referral zone" has ballooned, running full spectrum from photo sharing to Twitter to ratings and review sites.

Measure what matters

Drawing upon eight different data sources within Nielsen, Homescan BuzzFacts enables marketers to gauge Internet-driven brand performance on a number of critical metrics:

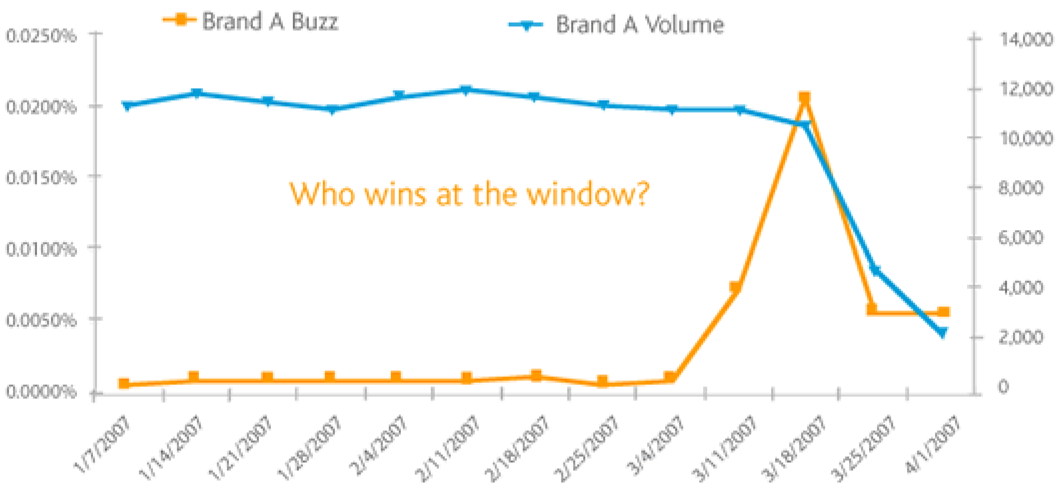
- Volume—How many comments about your brand?
- Reach—What is the depth of exposure, number of impressions viewed?

- Dispersion—What is the distribution and virality of the issue or conversation?
- Sentiment—To what extent are messages favorable or not?
- Emotion—How did consumers feel?
- Issue—What specific issues are being discussed?
- Source—Where is the conversation happening?
- Author—Is the source credible? What kind of consumer are they?

Timing is everything
When a crisis hits the Web, there is a narrow window of time to respond before brand equity gets damaged. In the case of the tainted pet food scare, brand volume dropped by 8,000 units just three weeks after the first posting. The shoppers most reactive to the postings were "speakers", those who make their opinions known on the Web.

When a crisis hits the Web, there is a narrow window of time to respond...

The Defensive Branding Window



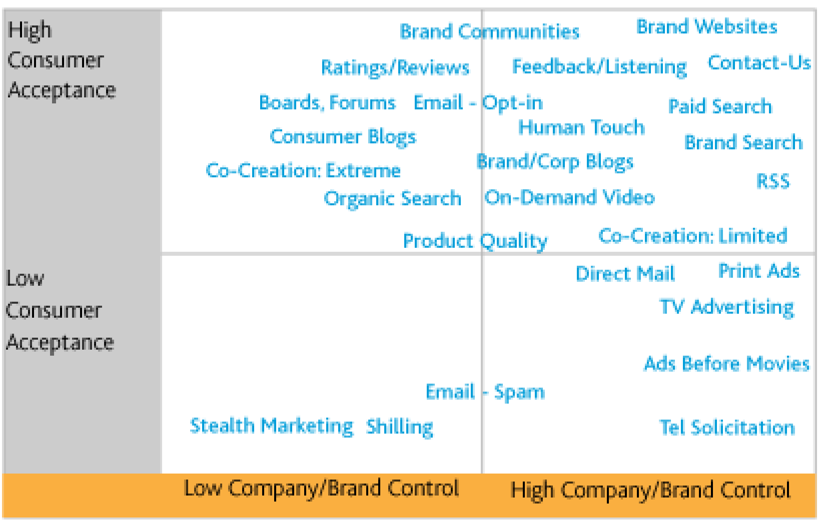
Source: 2007 Nielsen CGM/Homescan BuzzFacts

Companies that have encountered CGM attacks have reacted with different strategies. Yum Brands tried systematic listening and alerts to the management team. Comcast made progress with its customer service problem and reached out to influencers. Sony started a corporate blog and Web 2.0 employee training. Jet Blue posted an online video.

Control the dialogue
There are many ways to share information with consumers; the trick is understanding which media resonate with key consumers who influence other shoppers. Presently, there's a real disconnect between the media followed by consumer affairs departments (letter, mail, telephone) and the media with a high consumer viral quotient (instant message, text message, photos, videos, e-mail links and blogs).

Which media resonate with key consumers who influence other shoppers...

Key Outcomes You Can Shape



Companies looking to connect where consumers plug in should deploy those techniques and tactics that reside in the upper right hand quadrant of the control/acceptance grid—Contact Us, brand searches, brand/corporate blogs, on-demand video, RSS feeds, opt-in e-mail, human touch and content co-creation.

Engage the engaged
Give the curious and the committed easy access to videos that reflect the brand personality and feature real-life consumers. Invite viewers to play, to watch and to share their own videos using co-author tools like Frito-Lay did for its Super Bowl ad design contest. Keep your web site and blogs current, fresh and edgy.

Recognize that there's a product conversation happening online, and choose to become a proactive part of it to embed the core messages that define your brand.

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http://www.nielsen.com/consumer_insight/ci_story4.html

Beyond Data:

The Power of Insights

By: Russell Evans, VP, Product Leadership and Kamal Tahir, Senior Marketing Manger, Commercialization and Market Leadership, The Nielsen Company

CI SUMMARY: Data is the first stepping stone on the path to powerful insights. Reacting to marketplace change is not enough. To succeed, businesses need the right information at the right time to plan more effectively. While the amount of available information keeps increasing, less than half of it will lend any real value to business decisions. Going beyond data requires a nuanced information ecosystem that turns data into actionable insights.

If you've ever felt buried under a mountain of data, you're not alone. Now more than ever, information overload weighs heavily on businesses. Consider these survey results from International Data Corporation (IDC):

- On a scale of 1-to-5, 40% of decision-makers rate their level of being overwhelmed by data at a four.
- Of the decision-makers surveyed, 33% noted a significant increase in available information since 2006.

As executives struggle with information overload, they also know "more" does not always mean "better". With most of your competitors working with the same level of raw material, little competitive advantage can be gained if that material is not enhanced in any significant manner.

This sets up a perplexing problem in today's competitive marketplace. Challenges like consumer fragmentation and channel blurring create a more complex business landscape, where the rules of the game keep changing. This ever-evolving landscape places a premium on effective analysis tools. Whether it's assessing promotional effectiveness or core consumer behavior, the right data can help deliver much needed answers.

The right data can help deliver much needed answers...

Companies need something more than an array of interesting data points; they need data which yields relevant insights. Unfortunately, that's not always the case. Less than 50% of available information is useful for making decisions, according to IDC. The right insights can help companies grow volume, profit, and share. It is imperative to understand the best method for discovering insights that drive step changes in your business or enhance tactical execution rapidly.

Mining for gold?
For years, industry reports have been adept at explaining what happened. But, to what degree does reporting enhance efficiency and value? If an information ecosystem is configured to predominately address the "what" of past performance, companies will risk spending a disproportionate amount of time and resources focused on the rearview mirror.

To navigate the road to success, which comes at an ever-increasing velocity, marketers must have visibility to what lies ahead. That is why insights are essential. Insights work similar to headlights; they illuminate the path ahead to reduce the risk of potential hazards. The more visibility I have, the faster I can go. With increased insights, I will be able to make faster decisions while navigating my business. Insights let companies plan effectively, and facilitate business decisions that help grow profit, volume, and share.

Insights work similar to headlights; they illuminate the path ahead...

While data and information provide the core components to a healthy information ecosystem, the insights provide the real value. A strong ecosystem allows an enterprise to mine data in order to reveal the root cause of business drivers, but businesses must carefully guard the health of each component. (See Sidebar, *The Power of Insights: How to find them fast, and make them work for* *you*, for information on how to foster a healthy information ecosystem.)

Time lag equals business drag

The "business as usual" approach to analysis takes several days to yield results. However, when business leaders fine-tune their ecosystem with technology, they can uncover the root cause of an issue in just hours. Of course, highly-tuned ecosystems driven by technology, has proved challenging.

Uncover the root cause of an issue in just hours...

Business as Usual

A significant gap exists between total data managed versus data utilized. Operating under the "business as usual" approach, one would struggle to bridge that gap anytime soon. Consider the average company's process detailed above. The result? It takes four to five days to get actionable information. When each data element is addressed as a single instance and then brought back together, it is time-consuming and fraught with potential errors. This manual process increases the time it takes to get insights that will give you a competitive advantage in the marketplace.

But what if your business could uncover insights in a matter of hours? Imagine that same solution is easily accessible to everyone and can help guide decisions with simulations and forecasts. The result? With a finely-tuned information ecosystem, it only took hours to get actionable facts, run scenarios, formulate and implement decisions. In this approach, technology does the heavy lifting and the competitive advantage comes from advanced, behind-the-scenes analytics.

Competitive advantage comes from advanced, behind-the-scenes analytics...

Information Ecosystem

A healthy information ecosystem takes business intelligence and puts it in a business context. Because the information ecosystem puts data elements in logical information stacks, it allows the data to be staged together to address a business issue. With access to integrated information from multiple data sources, organized in logical information stacks, this sophisticated approach looks at specific thresholds to determine whether price, promotions, or other key drivers are affecting a given variance.

Using embedded analytics, the business intelligence tool does more than data mining. It evaluates the most relevant factors, so you can identify the root cause faster. This benefit reinforces the need for a healthy information ecosystem. Without it, the symbiotic relationships between each component will fail and critical insights will be lost.

Sharing insights, taking action

Businesses with a winning edge know how to adapt to market shifts by leveraging insights into action. Here are the essential steps to make that happen:

1. Share information with relevant stake holders in a seamless and most efficient way possible.
2. Ensure that everyone is looking at the same insight. To facilitate decision making, you need one version of the truth.
3. Confirm that there is interoperability between applications to execute recommended actions based on insights.
4. Allow the ability to create simulations based on the insight. This will help you understand which levers can be pulled to drive profit, volume, and share.

The real value of information rests with the ability to guide strategic decisions. To that end, the most powerful insights are:

- Shared quickly throughout the company
- Poised to guide actions that drive profitable growth

A healthy information ecosystem is a vital necessity...

To derive swift action from valuable insights, a healthy information ecosystem is a vital necessity. A tightly integrated technology system makes nimble responses possible. Perhaps you've just made a change in a three-week promotion. That information needs to travel down many paths: to the Enterprise Resource Planning system, so retailers are billed correctly; to operations, so trucks are loaded properly and sufficient orders are placed; and to the sales force, which can now create new forecasts. It's all part of a powerful information loop that's sustained by the health of each ecosystem component.

The companies that close the information gap most efficiently and effectively will win in the marketplace. So the question becomes, how healthy is your ecosystem, and how healthy is your competitor's?

To see best practices in action and learn how Nielsen can take you beyond data, visit www.NielsenAnswers.com.

Nielsen Consumer Insight, September 2008

Rising Russian Rubles:
A Powerhouse on the Rise

By: Ilona Lepp, Client Service Director, Retail Measurement Services, Nielsen Russia

CI SUMMARY: Consumer confidence in Russia is above average, and with good reason: a strong economic picture, rising incomes and a growing middle class are spurring purchases across the board, from new food categories to technology to premium brands of vodka. And with more stores than any other country in Europe, the retail landscape is still under-developed, leaving lots of room for retailers and manufacturers to succeed in this huge market.

Russia is the most macro-economically stable country in Europe. With a budget surplus of 4%, total debt at a mere 8% of GDP, and strong earning power from oil, the economy can weather almost any storm. In fact, the price of oil, currently a major headache for most of the world, is almost all upside for Russia, which makes money even when it's priced at $14 per barrel. With oil prices in early August nearing $120 per barrel, Russia is on track to become one of the most cash-rich and powerful countries in the world in the next decade.

Happy times
Consumer confidence in Russia reflects these happy economic times. According to the 2008 Nielsen Global Consumer Confidence Index, Russia is well ahead of the global average of 88, with an index of 105 for the first half of the year—up three points over the first half of 2007. Driving that confidence is a large and rapidly growing Russian middle class. This year, there are 36.5 million households (98 million people) with annual incomes of more than $10,000; and in just two years, 45 million households will have passed this threshold.

Consumer confidence in Russia reflects happy economic times...

Taking the income level up a notch, there are currently 23 million households (63 million people) with annual incomes topping $15,000, which is expected to rise to 34 million households in 2010. Here, the contrast with China is sharp, as China has less than a third that many people—or 25 million people—living in households with annual incomes over $15,000. Put another way, in just two years, China will have 51 million people compared with Russia's 89 million with annual household incomes over $15,000.

Increased wages = increased spending
Consumer spending is a big growth stimulant for Russia. Private consumption has risen on average 12% in the last three years and will stay at that level until 2010. Real wages (after inflation) grew 18% in 2005–06—the highest level in the world—and rose 15% in 2007. Growth is expected to continue to escalate by 10% per annum for the next three years. These figures compare starkly with real wage growth in other markets.

Consumer spending is a big growth stimulant for Russia...

Russian Real Wages are Still Growing

Real wage growth annual average in 2004-08

Germany	0%
Japan	0%
USA	0.2%
CEE	4%
China	12%
Russia	14%

Source: Russia Outlook - Economist

And Russians put their money where their mouths are—literally. A whopping 117.7% of the total population has a mobile phone—and not just any mobile phone, but a really good one. According to Nielsen Mobile, the average Russian subscriber spends 7,036 Rubles ($293 US) on their new phone. In addition, one-third of the total population owns either a PC or a laptop and 29% of Russians aged 18+ have Internet access. For all that spending, 56% of the Russian population has a dacha—a small plot of land near their city with or without a house, and 39% of Russian families own a car.

Mobile mania

While their mobile devices are expensive, their services are not. The average Russian mobile phone subscriber spends just 557 Rubles ($23 US) on their monthly bill, which is good because Russian subscribers are more likely than subscribers in other markets to shoulder the costs themselves. As of Q1 2008, Nielsen Mobile reports that just 3% of Russian mobile users said their company foots the bill, compared with 7% of U.S. subscribers.

Russian subscribers are unique in other important ways—and text messaging is one of them. As of Q1 2008, 77% of Russian mobile users used text messaging, making them more than twice as likely as the average U.S. mobile subscriber (29%). However, they were less likely to use MMS multimedia messaging (15%, compared to 24% of U.S. mobile media subscribers). Though text-messaging is highest among teens (a whopping 98% of Russian teen mobile users send or receive text messages), text-message use is also fairly high amongst older subscribers: 52% of subscribers 45–54 and 31% of subscribers 55 and older.

77% of Russian mobile users used text messaging...

But text-messaging isn't the only data service Russian mobile subscribers have adopted quickly. Twelve percent of Russian mobile subscribers—roughly the same proportion as in the U.S.—use their mobile phone to browse the Internet. News and weather are the most popular categories in other markets, but 34% of Russian mobile Internet users say they visit entertainment sites over their phone, followed by search (28%) and E-mail (24%).

Let's go shopping

Given its enormous size, Russia has the largest number of retail stores in East and Central Europe—264,373, which is more than twice as many stores as the Ukraine. However, the Russian market is still in its early developing stage and has significant untapped potential for large retail format development. Today, Russia has just over 33 retail outlets per million inhabitants, which is meager in comparison with countries like nearby Norway, with 442 retail outlets per million inhabitants, Austria with 408, or Denmark with 366.

The Russian market has significant untapped potential for large retail format development...

Russia Retail Card 2008

The Russian Market is still in its early developing stage

	2006	2008
Hypers	137	213
Hyper per 1 million inhabitants	1.5	1.5
Supers	3424	4325
Supers per 1 million inhabitants	24	31.9
Top 5 Retailers ACV, %	7	16.5
Private Label, %	0.9	1.5

Source: Nielsen's Retail Sales Audit

And that booming middle class is supporting the development of hyper/supermarkets, which logged a very healthy growth rate of 67%, even while the number of retail outlets across Russia declined by 7% in 2007 vs. 2006. Hyper/supermarkets in Russia contribute much more to non-food sales (51%) than to food sales (26%), but their importance to the food sector is growing, taking over value share from the traditional trade channel, particularly in highly developed St. Petersburg, where hyper/supermarkets had a 74% value share in 2007, vs. a 67% value share in 2006.

Both global and local retailers are present in the Russian market, and with the booming economy, global players regularly show interest in entering and expanding. Retail expansion in Russia is a two-way proposition, with regional retailers moving to Moscow, and central retailers looking for possibilities in the regions.

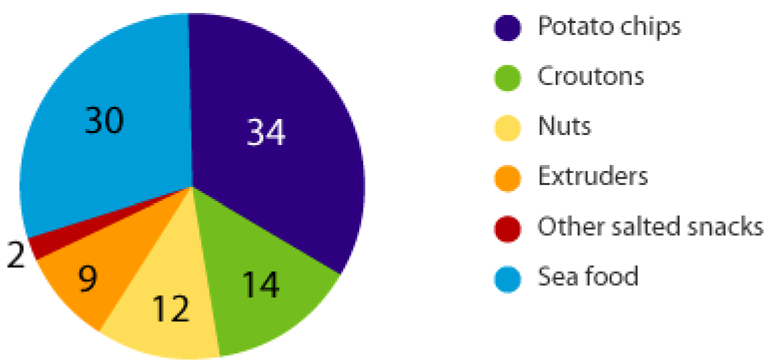
No time for dinner

Once they arrive at their local hyper/supermarket, Russians are increasingly opting not to buy the ingredients for a homemade meal. In a trend familiar almost everywhere, urban Russians are devoting more time to working and studying, and veering away from cooking time-consuming meals. As a result, meal makers are the fastest growing food categories in Russia, with a 47% volume growth 2007–2008. Sales of snacks, chocolate bars, single-serve yogurts and other “on the run” products have also grown, particularly for higher income residents in the largest cities.

Meal makers are the fastest growing food categories in Russia...

Nielsen's Snack Market Study, based on a retail audit of urban Russia from April 2007 to March 2008, found that total retail sales of potato chips, dried seafood, croutons, salted nuts and other snack categories' value sales have grown by 14%, amounting to approximately 45 billion Rubles.

Retail Sales of Salted Snacks in Urban Russia



Source: Nielsen's Retail Sales Audit in Russian Cities with the Population Over 10,000 people for April 2007 – March 2008 Period

Potato chips remain the largest category in packed salted snacks, with 34% of the market in value. Over the survey period, potato chips' value sales grew by 15% in Russia, and potential growth might not be exhausted yet; Russians consume 0.6 kg of chips a year per capita, while Americans and Britons consume 10 times more. Among the mature consumer markets, France is the closest to Russia for potato chip consumption, at 1.4 kg a year per capita.

Nielsen also spotted a new tendency by Russian consumers to buy snacks year-round and as standalone purchases, rather than as by-products of another purchase—buying chips with beer, for example. During the winter of 2007–2008, sales of chips and nuts did not suffer the significant decrease recorded the year before. The fastest growing salted snack categories were also consistently strong in pack upsizing[1], showing that consumers are ready to buy more snacks and at a higher absolute price.

Compared to other countries, private label sales are weak in Russia, with only a 1.5 share against 44.1 share for the top five branded labels. However, private label is growing steadily in all major categories. Of all culinary categories, private label has the largest share in regular soups and shows the highest rate of value growth at 88% between 2007 and 2008.

Private label sales are weak in Russia...

The top five snack manufacturers—Bridgetown , Frito-Lay, Kraft, Russkart and Sibirsky Bereg—occupy about half of the salted snacks market (48% in value and 52% in volume). But the leaders' share decreased between April 2007 and March 2008 compared to the previous year, while private labels have increased their share to achieve the highest share in the nut category, at almost 6% of total value sales.

And snack manufacturers would be wise to watch for competition from complementary snack categories such as chocolate bars, milk deserts, biscuits, chips and drinking yogurt. Eastern Europeans, Russians included, have a sweet tooth, as evidenced by very strong positive growth for chocolate and sugar/confectionery items. Russians posted the highest regional growth and the largest share of the chocolate category in 2007, while chocolate bars' value growth was a healthy 23% during the survey period, with big packs prevailing.

Eastern Europeans, Russians included, have a sweet tooth...

Given recent steady price increases in basic commodity items worldwide, the largest contributors to 2007 global growth in terms of absolute dollar value were basics like milk, cheese and meat, due in part to the expense of producing and shipping these categories around the world. In Russia, milk categories[2] were most affected by the food inflation and showed a drop in volume sale caused by the highest price increases from 2007 to 2008: 35% on the average[3]. But by the end of first half 2008, the declining trend stopped and the sales stabilized. At the same time, butter rose 43% per kg and margarine was up 35%, though those price jumps did not impact sales. Drinking yogurts exhibit the fastest growth—both in volume and value—in Russia, partly due to single-serve packages containing probiotics and other perceived health benefits.

At the same time, interest of many Russian urban households to convenience and time saving does not mean that fresh food sales are declining. According to Nielsen's ShopperTrends 2008 study, in Moscow, expenditure on fresh food increased by roughly 40%—less than expenditures on FMCG products. Share of fresh food (fruit and vegetables, meat, chicken, fish and seafood) in a monthly expenditure still accounts for over half of all food, grocery and personal care spending.

Share of fresh food still accounts for over half of spending...

Importance of modern trade in selling fresh food is on the rise. Thus, in 2008 roughly 60% of Moscow shoppers prefer purchasing these products in modern trade, supermarkets being the most popular channel for about 30% of shoppers.

Modern trade gained new customers first of all at the expense of open markets, having been traditionally popular in Russia for purchasing fresh food, but during past years gradually loosing their positions.The percentage of shoppers purchasing fresh food in open markets has shrunk this year, nevertheless remaining high compared to other product categories.

Time for a drink

The growing Russian economy is having a positive effect on all the consumer goods categories. And alcohol beverages are a "model" example, indicating the state of personal finance of a Russian consumer. Recent economic good times have inspired Russians to upgrade their brands, while also branching out and driving steady growth rates for beer and premium vodkas and other categories of strong alcohol like whiskey and tequila.

Recent economic good times have inspired Russians to upgrade their brands...

Alcoholic beverages were up 17% in Russia from 2006 to 2007 in the markets with more than $1 billion in value sales, bouncing back from a decline in 2006 due to new tax legislation for imported alcohol. As the largest of the spirits categories, traditionally Russian vodka is truly an international beverage and the mixer of choice around the world. With 11% global growth between 2006 and 2007, vodka sales in Russia are driven by greater distribution, premium brands and flavored vodkas, but its 7% growth[4] is modest in comparison to beer.

While the U.S. is largest in terms of pure value sales for beer, the largest year-over-year growth from 2006 to 2007 came from Russia, thanks to increased consumption and to a leading manufacturer introducing new products.

The whiskey category is not as trendy as vodka, but there is growth in several markets, including France and Great Britain. Though Russia is a smaller market, whiskey consumption is growing there (+54%)[5]. The trend toward more expensive, premium beverages extends into this category, driven mainly by key mega-polices where real wages are higher than on the average in the country.

While still underdeveloped in comparison to branded alcohol drinks, private label vodkas has also begun to appear more and more, showing a strong increase in year over year growth. Private label beer is now available in two or three retail chains, as well, and its share is growing.

The future is bright
The economy is booming, incomes are rising, consumers are happy, and the under-developed retail landscape is ripe for opportunity. Russia, already the sixth largest economy in the world—on par with the United Kingdom—is well on its way to becoming one of the most cash-rich and powerful countries in the world in the next decade.

(Global What’s Hot: Executive News Reports: What’s Hot around the Globe: Insights on Food & Beverage categories and Insights on Alcoholic Beverage categories, 2006 – 2007)

[1]Big packs development
[2]Without butter and cheese ,
[3]Compared periods **April-May2008 vs. April-May2007**
[4]Feb2006-Jan 2007 vs. Feb2007-Jan 2008, Data of Retail Audit, National Urban Russia
[5]Data of Retail Audit in 15 major Russian cities
Nielsen Consumer Insight, September 2008

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consumer insight

Delivering consumer clarity

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http://www.nielsen.com/consumer_insight/ci_story5.html

Global Immigration:

Opportunities and Challenges for Marketers

By: Doug Anderson, EVP, Research & Development, Nielsen Consumer Panel Services

CI SUMMARY: Immigration is one of the key forces shaping populations today. Record numbers of persons are leaving their homes and settling in new countries. Each brings with them new tastes, a new culture, and possibly a new language. In many countries in the developed world, immigrant populations are so large that establishing a relationship between them and your products may mean the difference between reaching brand sales goals or not.

Growing immigrant populations provide opportunities as well as difficulties for makers and sellers of consumer products. At the national level, sufficient numbers of immigrants can change the nature of entire consumer markets. It is hard to imagine the United States without salsa or other products originally brought to serve only the Latino market, the United Kingdom without its long-standing love of Indian food, which was first established in the days of the Raj and subsequently reinforced by millions of Indian and Pakistani immigrants, or France without falafel or shawarma stands. At the local level, immigrants tend to concentrate in particular neighborhoods, forcing retailers to change the product mix store-by-store.

Labor shortages bring migrant workers

Jobs and other economic opportunities are currently most abundant in countries with under-sized or declining workforces. In 1942, the labor markets of the U.S. were stripped bare by World War II. In the 21st century, aging resident populations in nearly the entire developed world are causing similar labor shortages. The resident population in the labor market in the more-developed nations of the world will remain constant at best, but more often, it will decline in many countries over the next 20 years, particularly in Western Europe. At the same time, less-developed countries will see their working-age populations grow by over 20%. As the economies of the developed world continue to expand and create new opportunities, those countries will need immigrants to meet labor shortages.

Aging resident populations are causing labor shortages...

In 2005, over 191 million persons—some 3% of the population of the world—had been living outside their country of birth for a year or longer. In industrialized countries, the number of immigrants more than doubled between 1985 and 2005, from 55 to 120 million. About half of the persons who left a less-developed country end up in the more-developed world, and more than half of those ended up in either the United States or Canada.

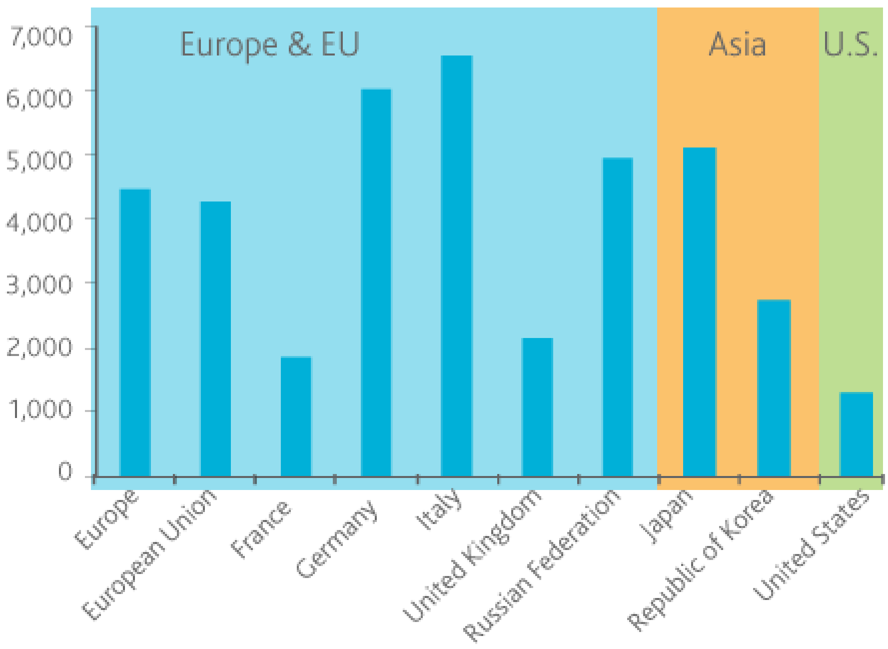
Immigrants fuel growth

In the more-developed world, immigrants can make up a substantial share of population growth or provide a hedge against potential declines as native populations age. Because immigrants tend to have higher fertility rates than native populations, especially in the developed world, immigrants and their children are a strong source of population growth. The majority of growth in the United States and Canada comes from immigrants and the second and third generation children of immigrants. In fact, by 2030, virtually all population growth in Canada will come from new immigrants just entering the country. And between 2005 and 2050, immigrants, their children, and their grandchildren will account for 82% of population growth in the United States.

Immigrants and their children are a strong source of population growth...

However, immigrants by themselves cannot reverse the rapid levels of population aging seen in the developed world. To maintain the current ratio between the working age population and the population over the age of 65, the United States must accept 10.8 million immigrants per year, each and every year, between now and 2050—far more than have ever entered the country in a single year. Simply maintaining the current size of the working population—not the ratio of workers to retirees—also requires very high levels of immigration. The chart below shows the immigration rates required (immigrants per year as a share of current population) for several countries around the world. Note that Italy, Germany, Russia, and Japan would require immigration rates several times higher than the United States.

Immigration Rate Required to Maintain Current Working Population



Source: United Nations Population Division – Replacement Migration

A gender shift

The gender character of immigration has begun to change. For much of the 20th century, the first immigrants to come to a new country were men. They got jobs, established themselves, and then brought other members of their families to new homes. Today, this trend no longer describes the majority of immigrants. The proportion of women migrants to the more developed world has recently reached 51% (55% of legal immigrants to the U.S. are women). While many of these women are coming to unite families, many others are moving on their own as principal wage earners.

The gender character of immigration has begun to change...

As the kinds of jobs available in the developed world change, so will the immigrants who seek to enter the country to take them. As the United States, Western Europe, and the more-developed nations in Asia have moved from an industrial to a service-oriented economy, old jobs that were traditional entry points for male immigrants have given way to new occupations that have more often been filled by women (e.g., medical and healthcare services). As education levels for women in the less-developed world rise, some countries have seen a “brain drain” as women professionals leave home for higher incomes in other countries.

Throughout the developed world, marketers have for years positioned products against unacculturated young men, rightfully assuming that men made up the majority of new entrants. Today, however, this trend has begun to shift, further complicating marketing efforts.

Speak the language

For many immigrants, the biggest struggle in a new country is communication. While some countries evaluate potential immigrants for entry based on their language skills (for example, 25% of a candidate’s possible score on Canada’s points system is based on proficiency in English or French), others—such as the United States—make quotas based on other criteria and require no English skills. The continuing use of other languages is often an area of contention and can become a political controversy.

In many countries, language-based communities provide one of the sternest challenges for consumer product marketers. As the proportion of foreign born persons increases, the need for bilingual marketing communications grows. Even for many second and third generation immigrants, marketing communications in the language they spoke with their parents and grandparents resonate more and are more easily remembered. In the United States, over 30 million people speak Spanish, making it the fifth largest Spanish speaking country in the world.

Language-based communities provide challenges for consumer product marketers...

Faith-filled conviction
One impact of Latin American immigrants into the United States has been a shift in religious affiliation. As the number of Latinos in the U.S. has quadrupled since 1970, the number of Catholics has increased by 38%. About 45% of Catholics aged 18–29 are of Hispanic origin.

In Western Europe, there are similar though smaller changes in the numbers of Muslims. Although Muslims make up less than 5% of the population in most countries, in France, they may be upwards of 10% of total population.

Money flows
When immigrants enter a new country, they often send part of their earnings back home, usually to support their existing families until they too can be brought to the new country. Because of the large numbers of immigrants moving about the world today, these remittances are a substantial amount of money and are among the fastest growing international financial flows.

Flows of monies sent to less-developed countries have more than tripled since the mid 1990s and now account for the equivalent of more than US$208 billion. And this only counts remittances that flow through the banking system. Much more flows through unregulated transfers. In 2006, India received $27 billion in remittances, Mexico $25 billion, China $22 billion, and the Philippines $15 billion. In the Philippines, this accounts for about 10% of the gross domestic product of the entire country, coming from about eight million expatriates. To recognize their contribution to the Filipino economy, each year the government welcomes immigrants coming home for Christmas in an official ceremony.

Flows of monies sent to less-developed countries have more than tripled...

Unexpected distinctions
When looking at immigration, it is easy to only see broad patterns and overlook key nuances. The major movements of people, like Latin Americans to the United States, while still difficult for marketers to deal with, are relatively easy to quantify. A good example of a key immigrant flow often overlooked is of blacks to the United States over the past 40 or so years. Changes in immigration law have fueled strong growth among black immigrants from the Caribbean and from Africa. Twenty-seven percent of the diversity visas authorized by the 1990 Immigration Act and issued between 1998 and 2006 were awarded to sub-Saharan Africans.

When looking at immigration, it is easy to overlook key nuances...

The impact of this high level of immigration is very strongly concentrated in several major cities. More than 25% of the black population of New York, Boston, and Miami is foreign born. These new immigrants accounted for 20% of the growth in the U.S. black population between 2000 and 2006.

Demographically, these new immigrants are fairly different from the native-born black population. While foreign-born blacks account for about 8% of total black population, they account for 16% of births, making their fertility rates much higher. Both Caribbean and African-born immigrants tend to be younger than the native black population and often have higher levels of education. Thirty-eight percent of foreign born blacks from Africa have a college degree. Seventy-six percent of children born to African immigrants, and 65% born to Caribbean immigrants live in a two parent family, versus 44% for children born to native U.S. blacks.

The effect of this for marketers is that the black population in several major markets is changing rapidly. Because, like most immigrant groups, newcomers tend to live in neighborhoods with other immigrants, local differences within a market may be extreme, making store-by-store assortment decisions essential to success.

Local differences within a market may be extreme...

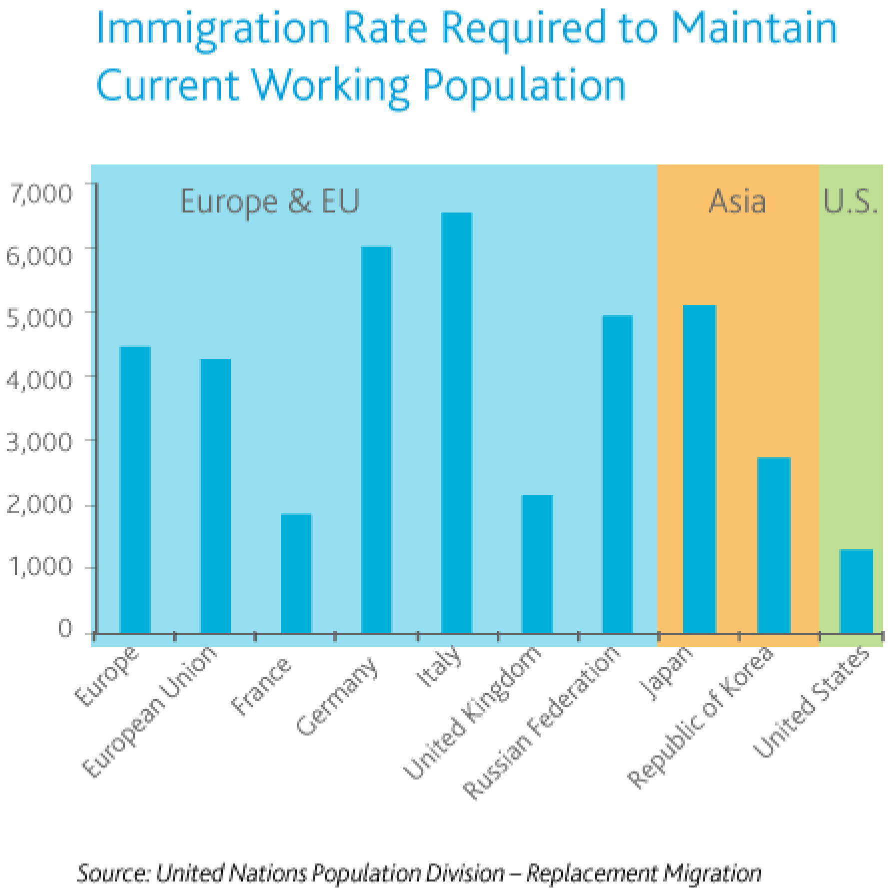
Regional Trends:
Europe
For much of the 19th and early 20th centuries, Europe was a supplier of migrants to provinces, colonies, and to the United States. Today, however, strong economies, rapidly aging populations, and shrinking labor forces have made many European countries magnets for incoming migrants. The EU currently takes in between 300,000–500,000 legal immigrants annually, with estimates ranging up to 500,000 for unauthorized persons entering annually.

As European populations age—and several of the oldest countries in the world are in Western Europe—countries will need to either boost fertility rates (which have been falling for decades), increase the flow of skilled immigrant labor, or both in order to fill jobs vacated by retirees and to pay for pensions. Some countries have had limited success with programs intended to increase fertility rates (monies paid to families with children, longer leaves for childbirth, etc.), but most have only stopped the decline in fertility rather than reversed it. That leaves new immigrants as the only other source for workers.

Americas
The United States and Canada take in more immigrants than any other countries in the world. Mexico, Central and South America, and Asia account for the majority of immigrants, though as we have seen, other groups such as Caribbeans and Africans are also making inroads. The majority of

population growth in both countries comes from immigrants and the second and third generation children of immigrants. By 2030, all population growth in Canada will come from new immigrants. Between 2005 and 2050, immigrants, their children, and their grandchildren will account for 82% of population growth in the United States.

The chart below illustrates long-term immigration to the U.S. The peak in 1991 comes from the illegal immigrant amnesty from the 1990 immigration reforms.



Asia
Asia is a principal supplier of immigrants to both North America and Western Europe. In addition, large numbers of persons move within Asia on guest worker visas. Many of the Asians who move to the more-developed world are well educated and may already hold professional degrees.

Middle East
The oil-rich states of the Middle East have the highest shares of foreign workers of all countries of the world. Foreigners fill the majority of private sector jobs in Kuwait, Oman, Saudi Arabia, and the UAE, 90% or more in some occupations in some countries. Rapid population growth among the native populations mixed with a very high incidence of foreign workers means that unemployment among younger residents is a growing problem.

A major force
Immigration has been and will continue to be a major force in shaping global populations. People move for a variety of reasons, from escaping something bad to heading for something good, and their numbers continue to mount. Aging populations in the more-developed world mean that these countries will be targets for immigrants for decades to come. As globalization forges more links between countries and the cost of traveling continues to fall, increasing numbers of people will leave their homes for new opportunities.

Immigrants bring with them new cultures, new tastes, and often new languages, all challenges for makers and sellers of consumer products. Strong immigrant communities provide a little piece of home that attracts more immigrants. It may not be appreciably harder, beyond the journey itself, for a rural Mexican laborer to adjust to life in Los Angeles than to life in Mexico City. In both places, he or she will likely be employed in a 3-D job (dirty, dangerous and difficult), will struggle to find affordable housing, and will live in an area where everyone speaks Spanish and where the stores carry familiar products.

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