

consumer
360

The Nielsen Annual Client Conference

Date: May 16, 2007



Realising opportunities in the

dynamic

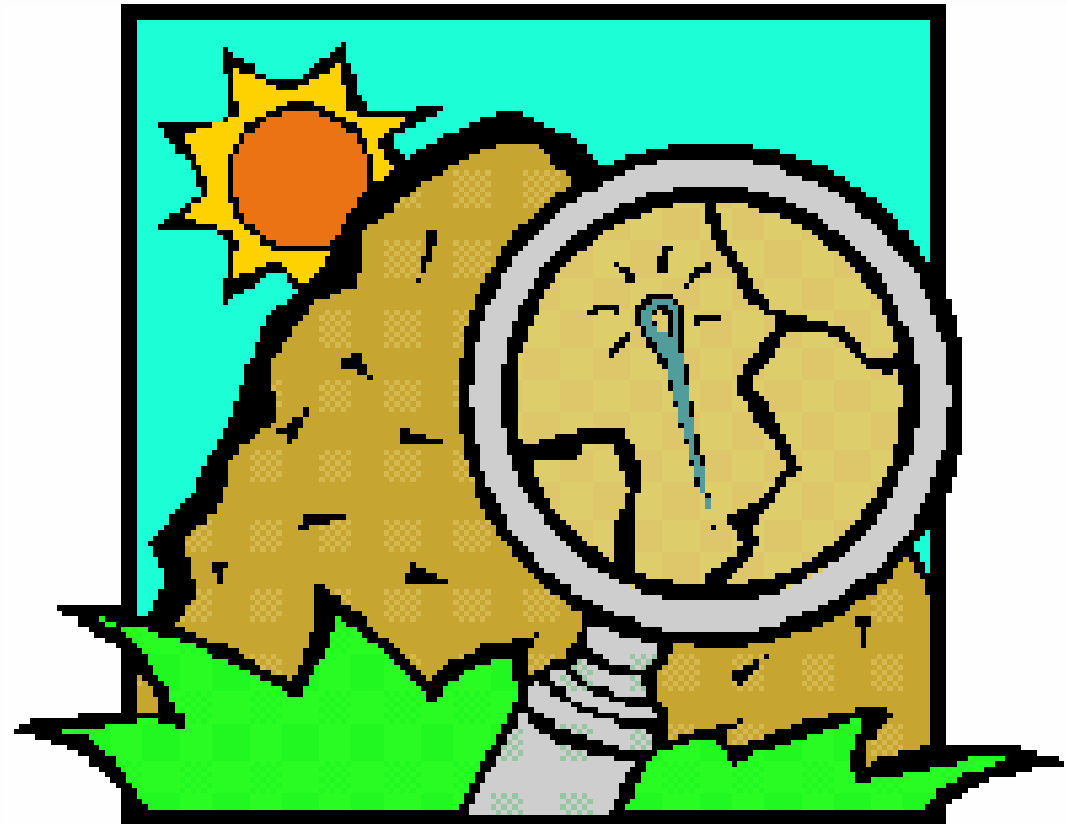
Retail, Media and Consumer environment

nielsen
.....

Thinking Small

*Isolating, understanding and
connecting with the new consumer*

***Scattered
pockets
of
affluence***





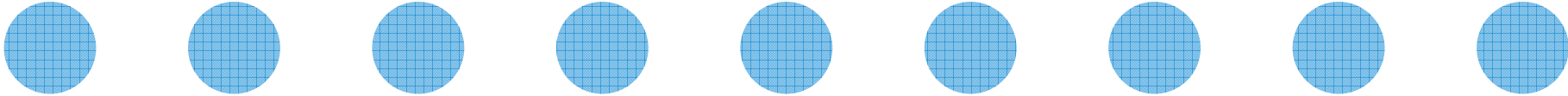
consumer
360

***Tuned out
to
'mass',
irrelevant
messaging***

Another example from the health beverages category

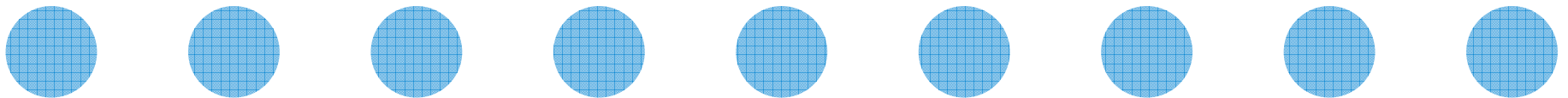
	All shoppers
In-store triggers (packaging, display, promos, pricing)	58
Advertising	12
Word of mouth (friend, doctor, chemist, shopkeeper)	36

Some other harbingers of change



Thinking small

A growing need
as well as opportunity
to target small, homogenous
geographical clusters



Which do you think are the most
upmarket pockets of Delhi?

1

Safdarjung Enclave
Chanakyapuri
Sarojini Nagar
Lodhi Road
RK Puram
Rashtrapati Bhavan
Race Course Road
Air Head Quarters

2

Rajinder Nagar
Naraina
Karol Bagh
Patel Nagar
Pusa Institute

3

Hauz Khas
Lajpat Nagar
Vasant Vihar
Friends Colony
Jangpura
Hazrat Nizamuddin
Greater Kailash
D D A Munirka
Kalkaji
South Extension
Vasant Kunj

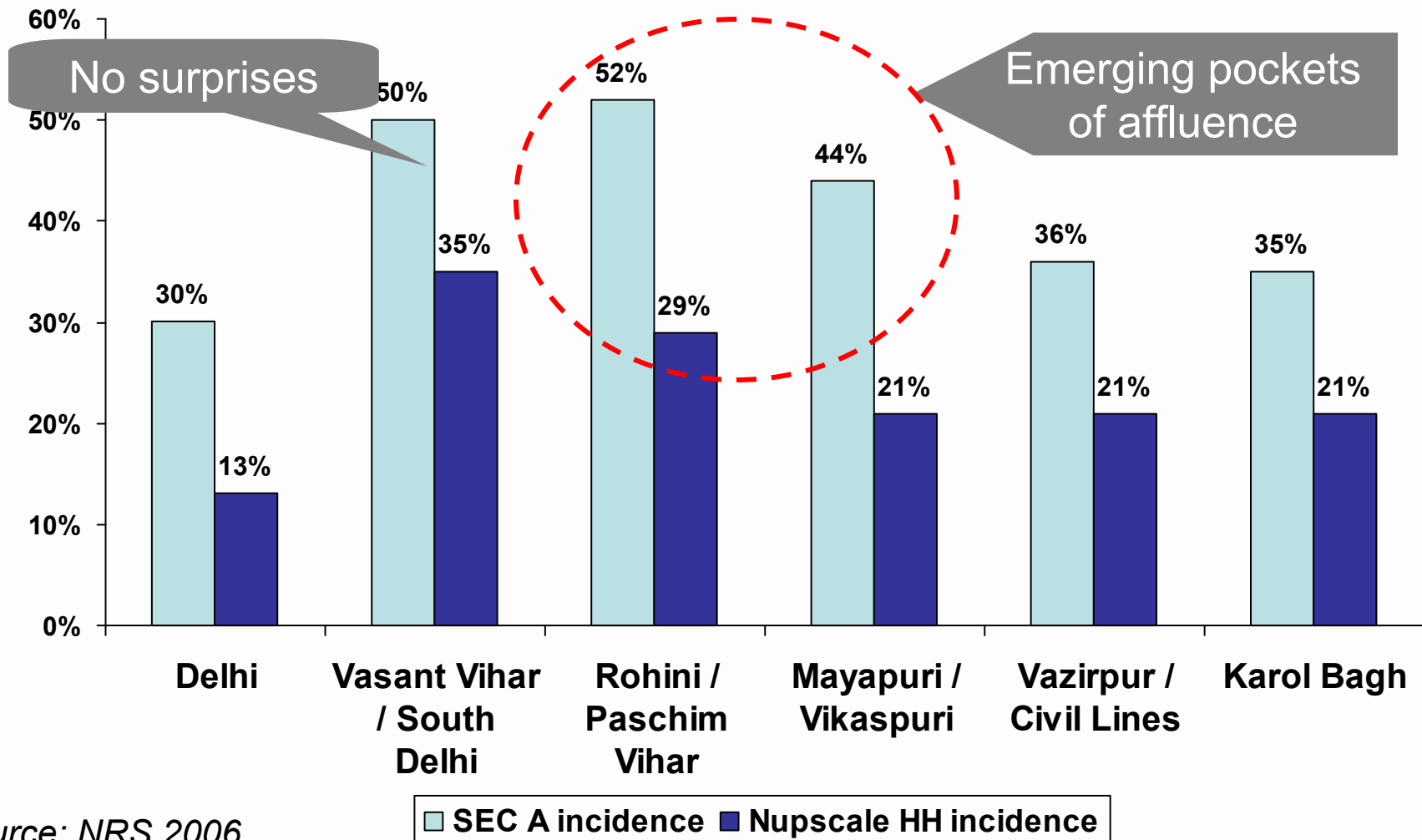
4

Punjabi Bagh
Paschim Vihar
Pitampura
Ashok Vihar
Rohini
Shakur Basti

And where are the prime targets for ...

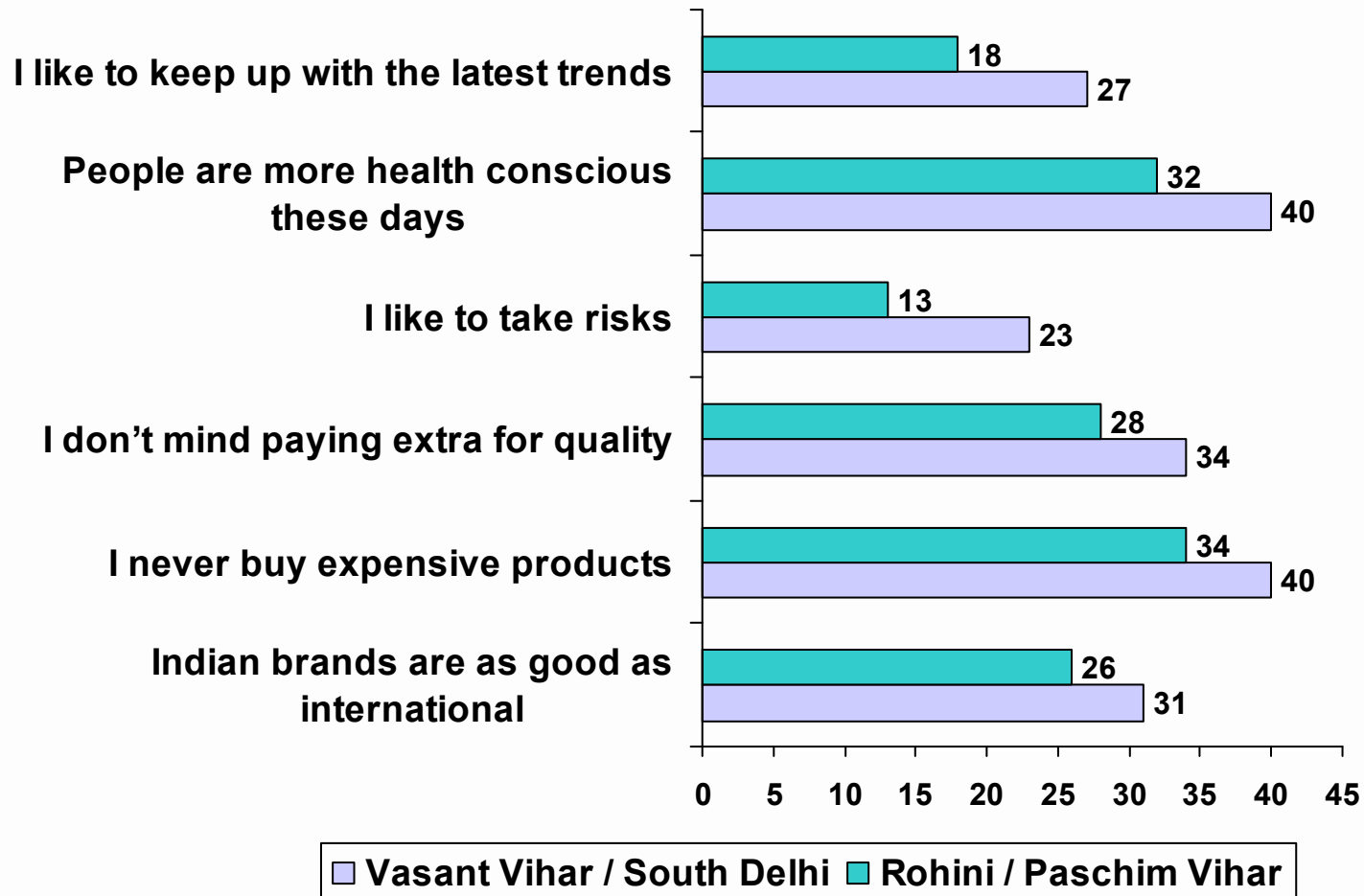
- Cornflakes?
- Ketchups?
- Ready To Eat Meals?

Here is a view of Delhi's most up-market zones

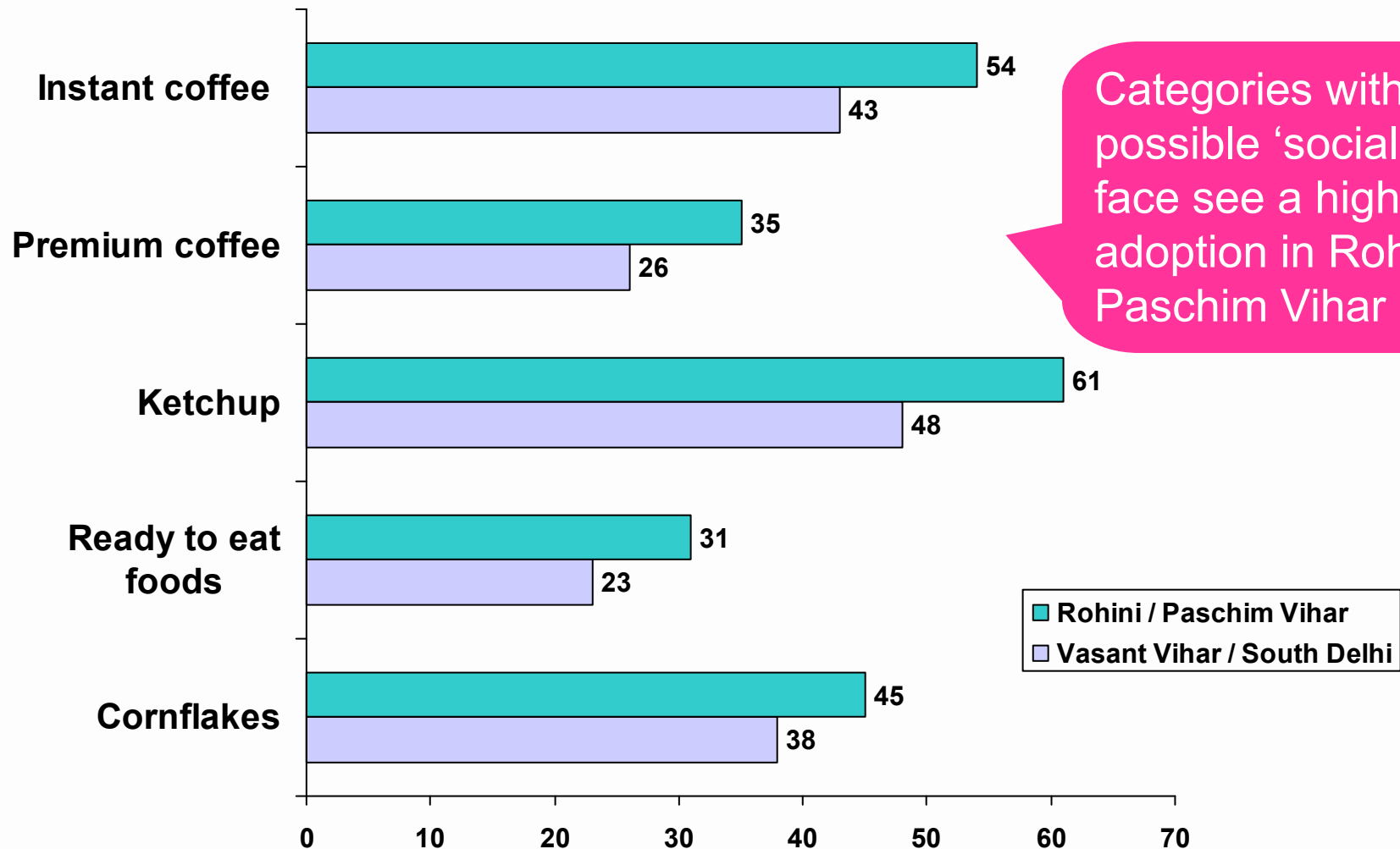


Source: NRS 2006

Some telling differences ...

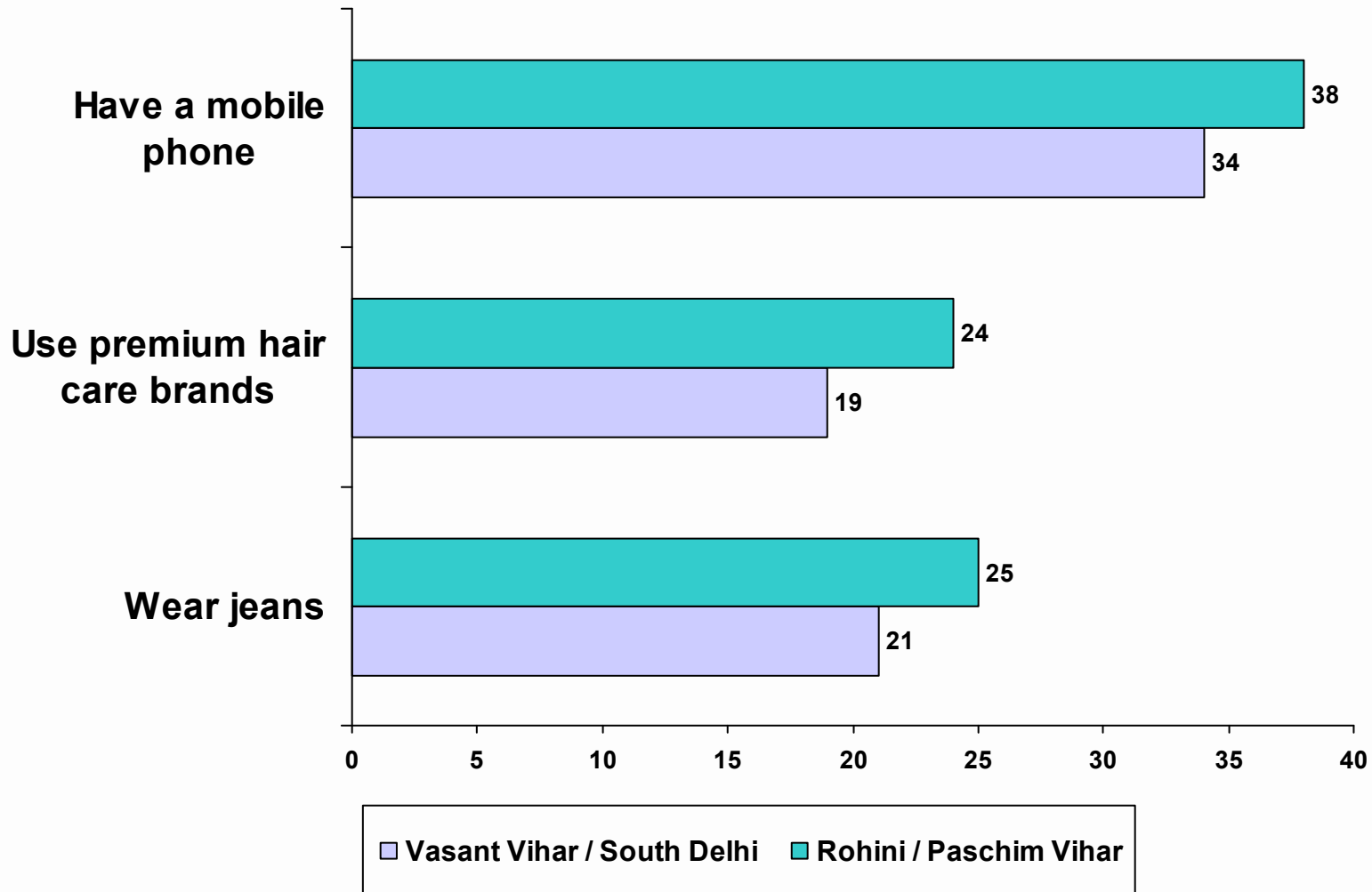


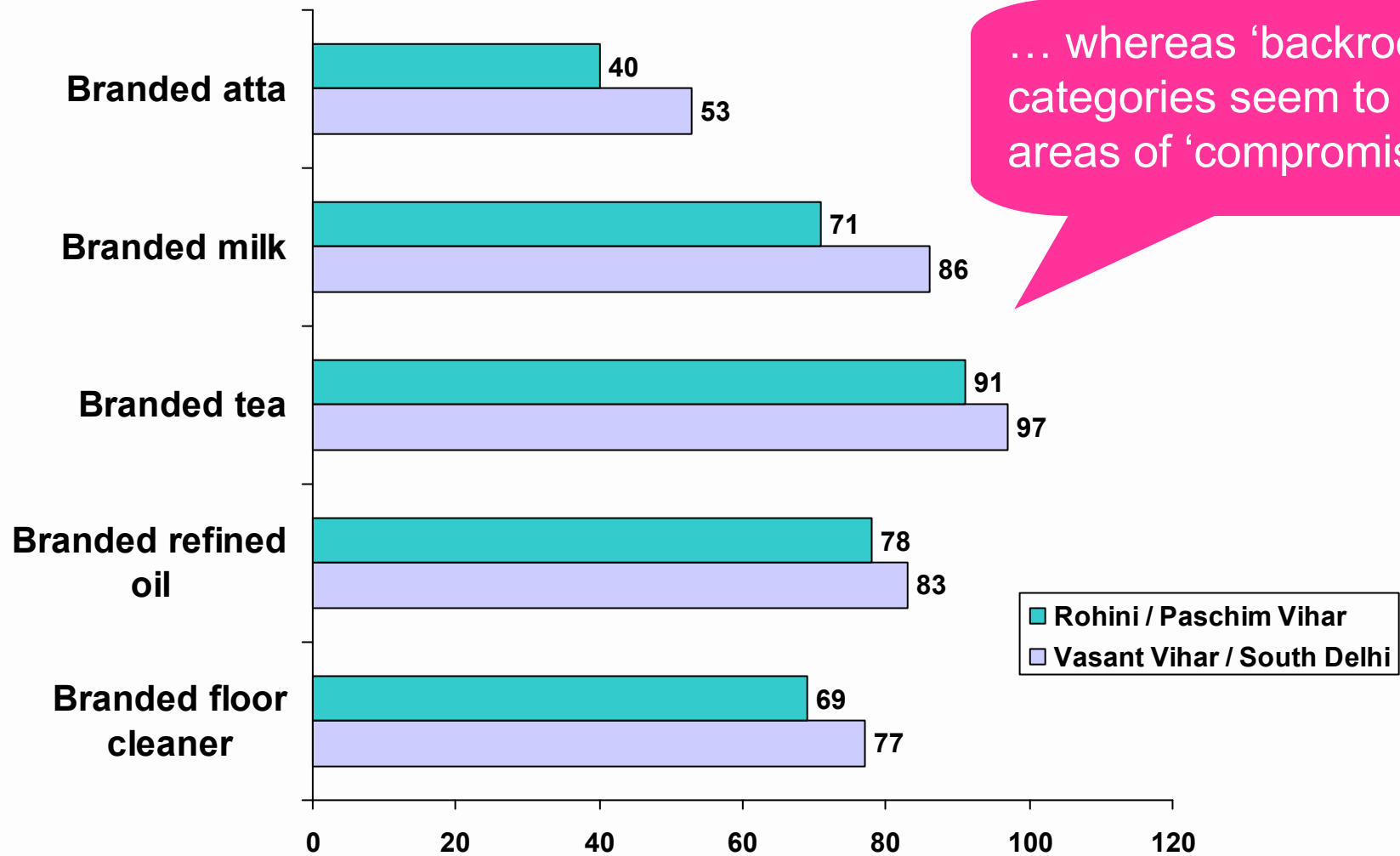
... differences that are borne out in consumption patterns



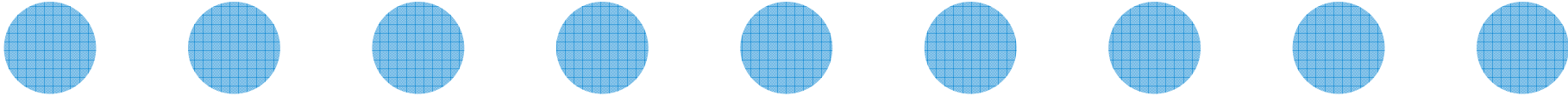
Categories with a possible 'social' face see a high adoption in Rohini / Paschim Vihar

... and some more





**How well are we serving the emerging
pockets of affluence?**

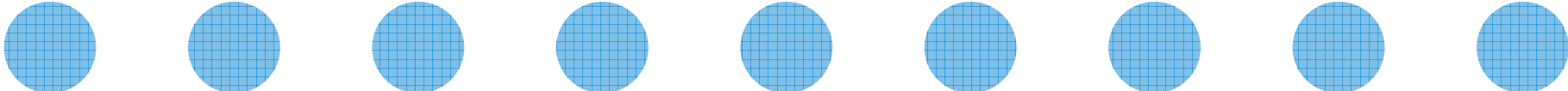


Some food for thought ...

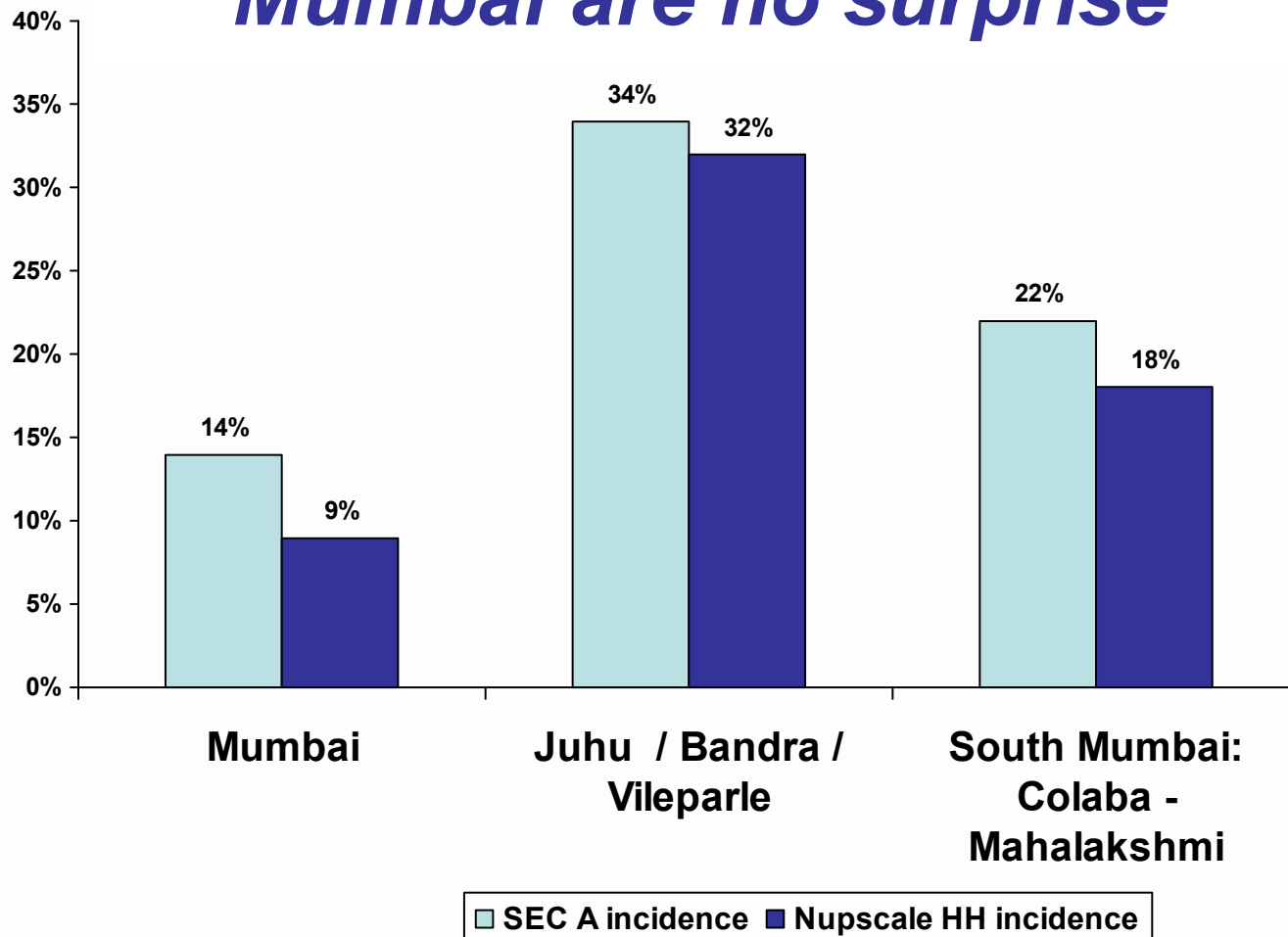
Outlets <i>(Population)</i>	Vasant Vihar / South Delhi <i>(930000)</i>	Rohini / Paschim Vihar <i>(1163000)</i>
Total retail establishments	11269 <i>12 per 1000 individuals</i>	9151 <i>8 per 1000 individuals</i>
Modern Retail Stores	75	23

Source: Retail census

Some illustrations from Mumbai



The most upmarket pockets of Mumbai are no surprise



However, mapping potential on some other parameters is also interesting

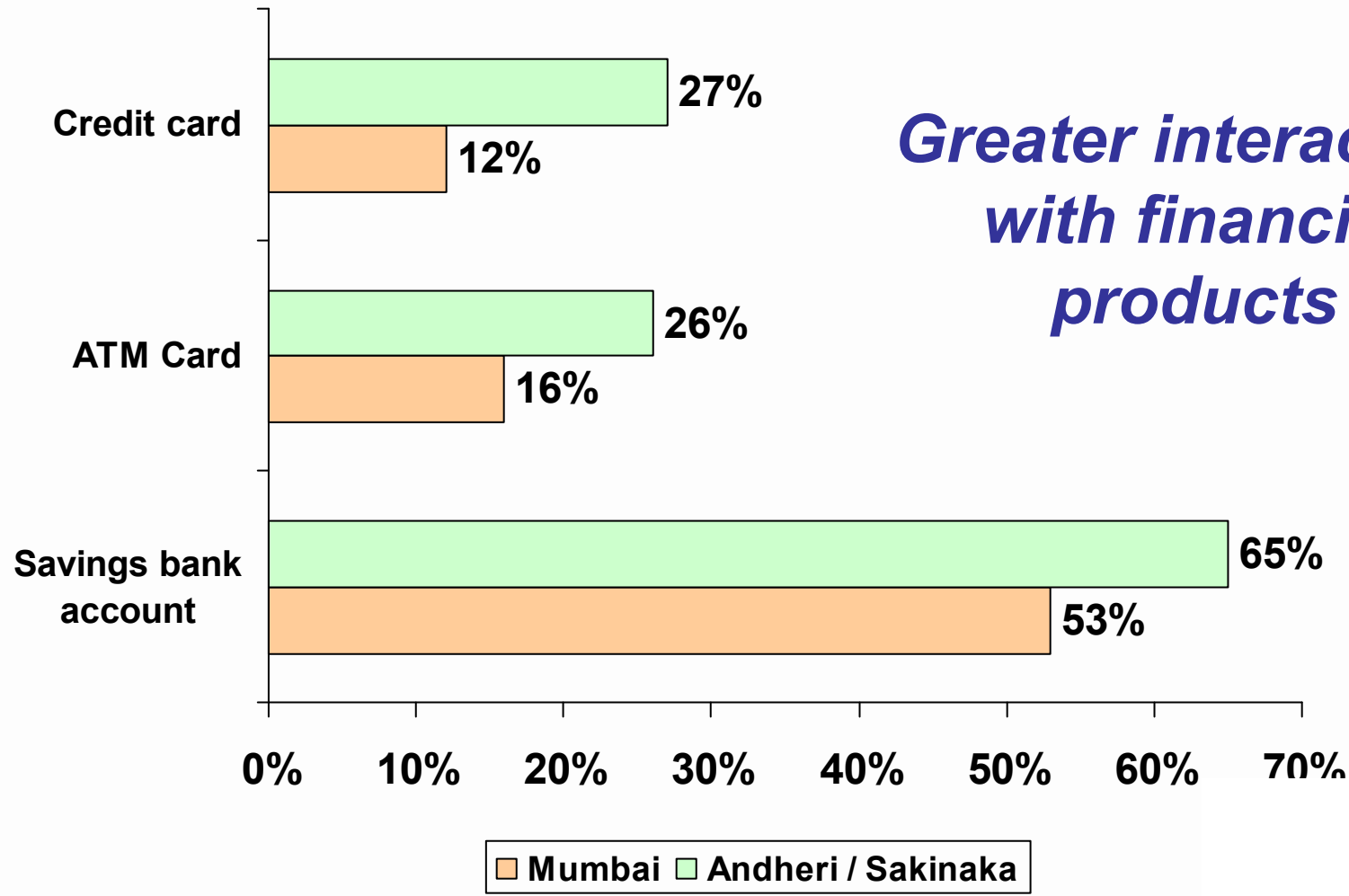


The age distribution of the population – the proportion of younger people in a zone

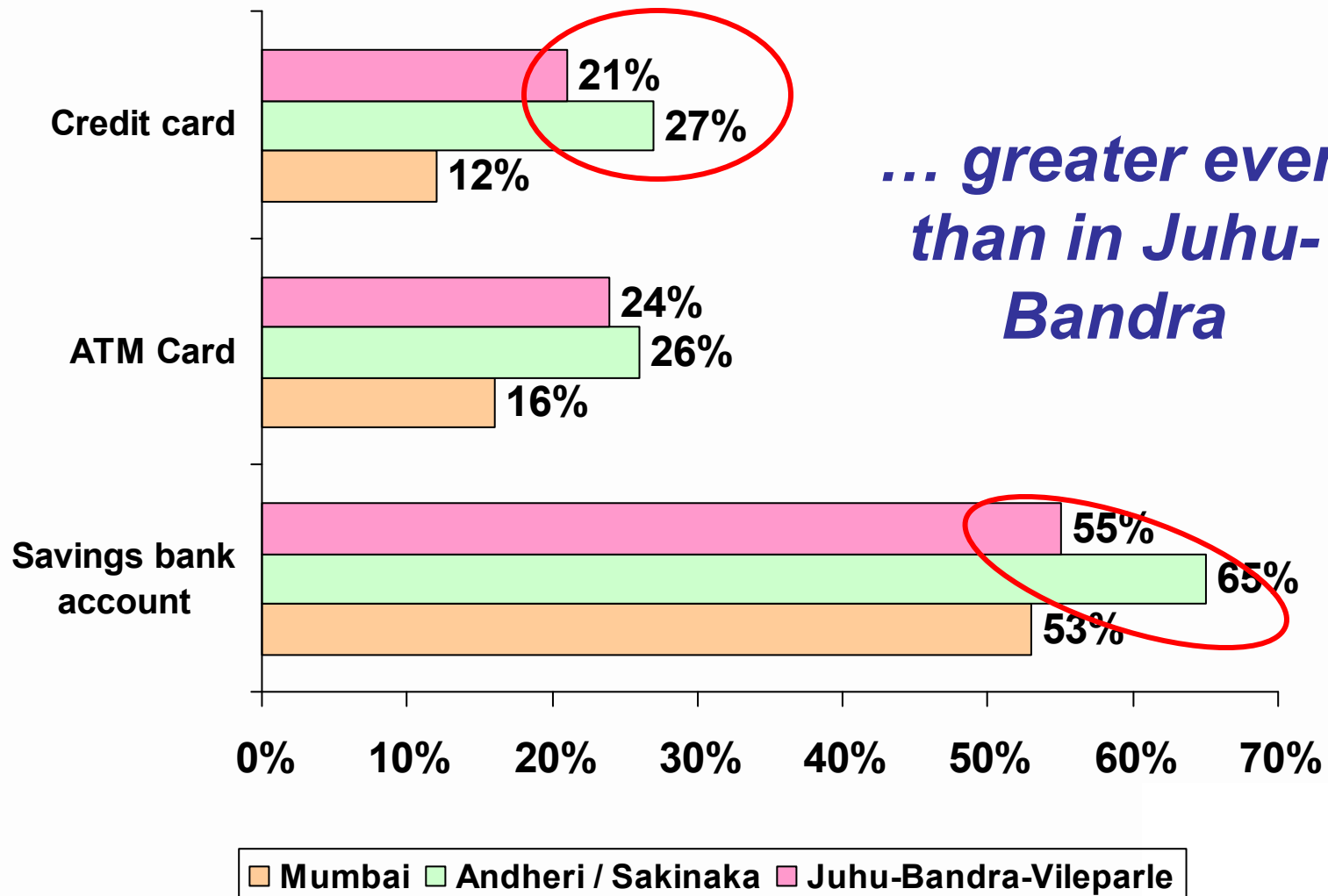


The proportion of working women in a zone

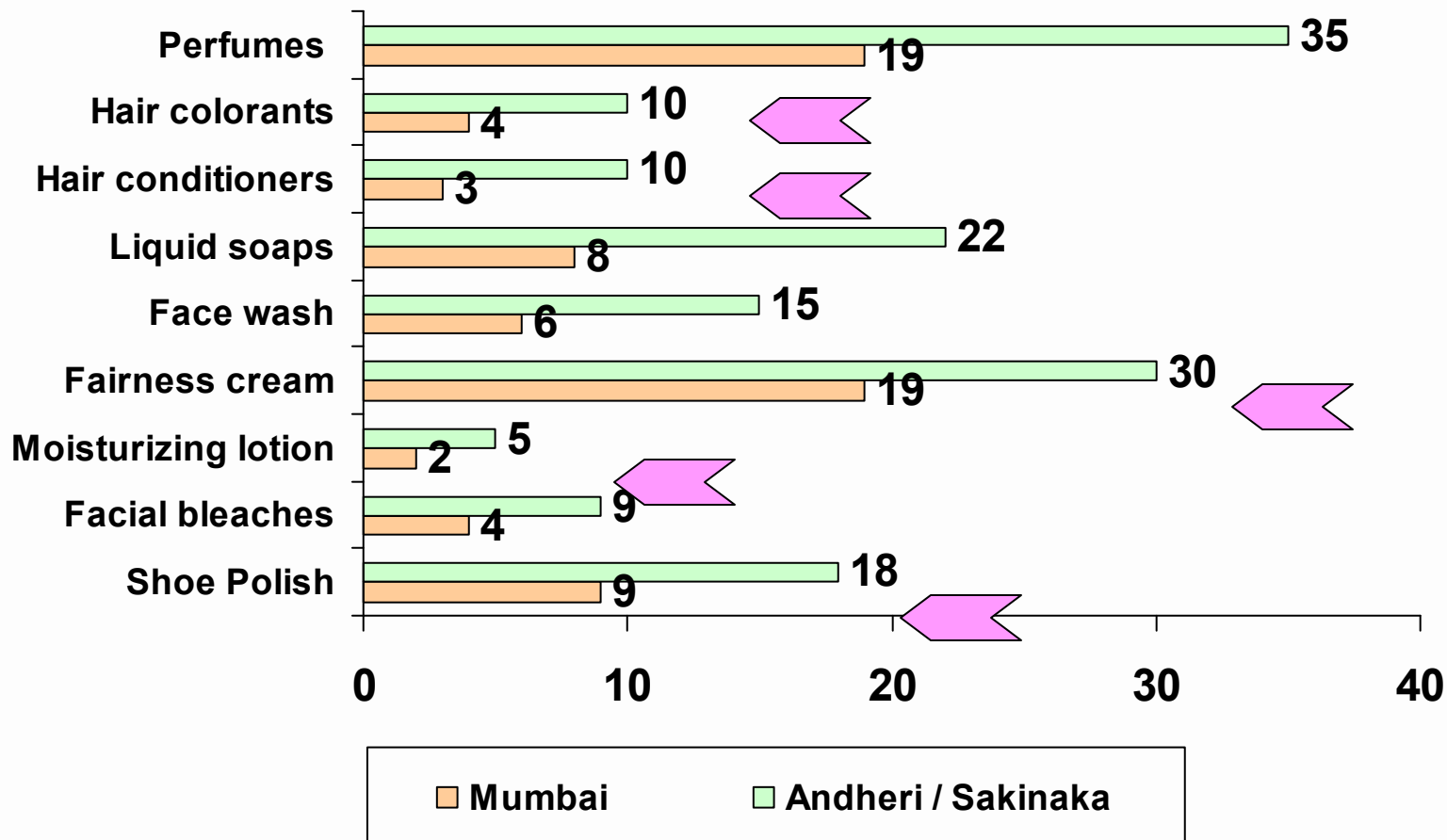
So we find ...



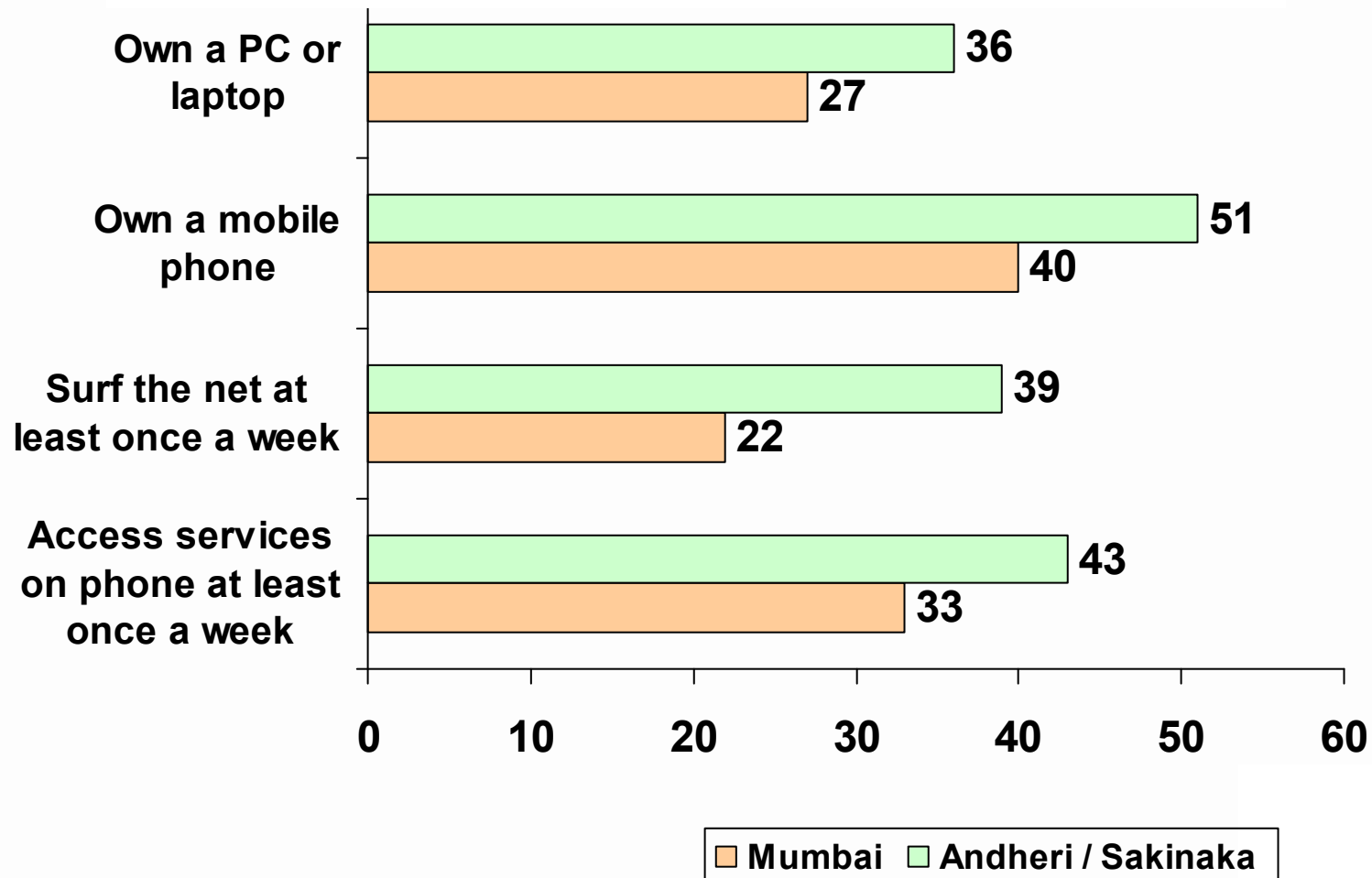
So we find ...



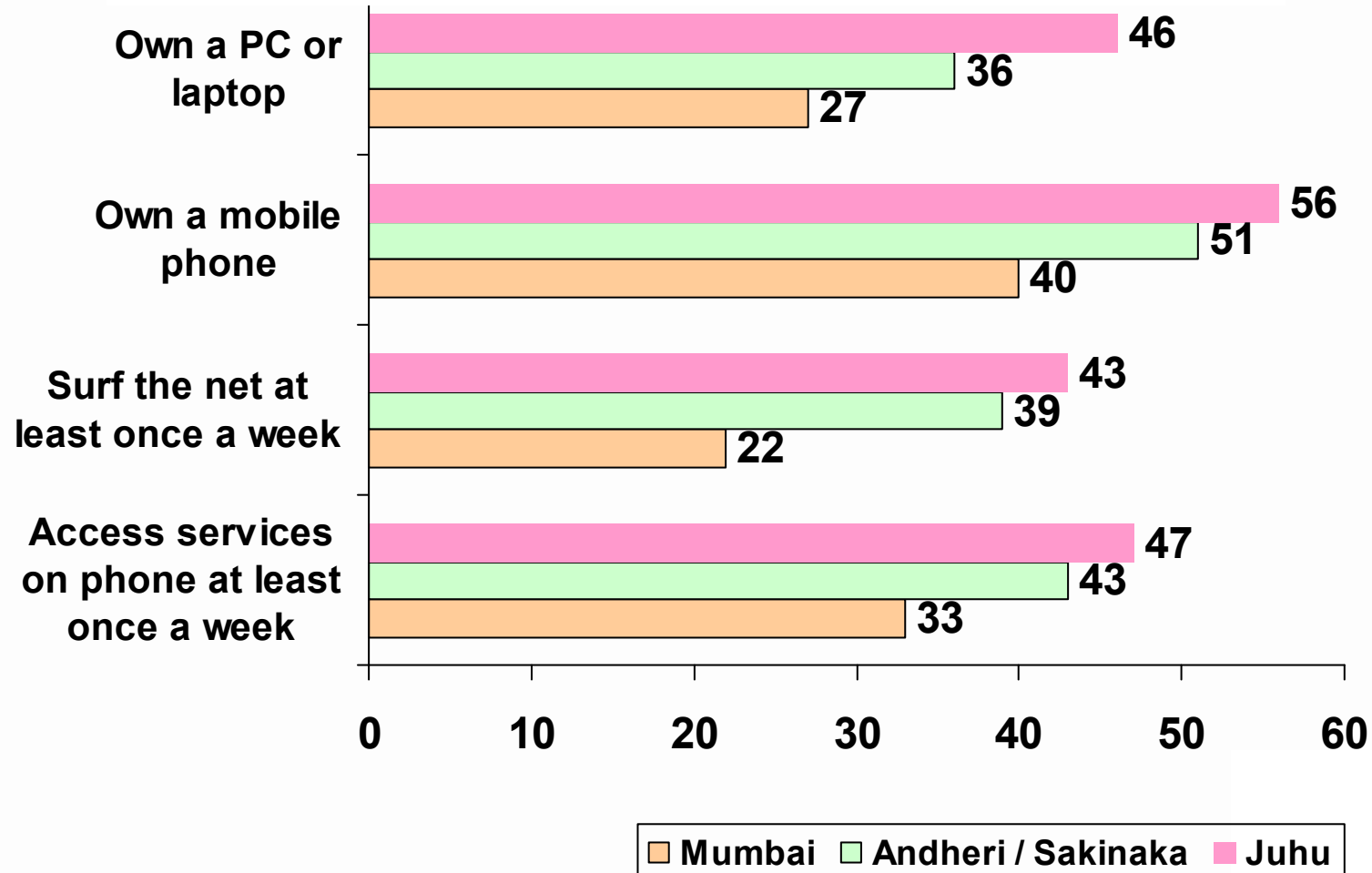
A greater interest in personal grooming



Greater interaction with technology



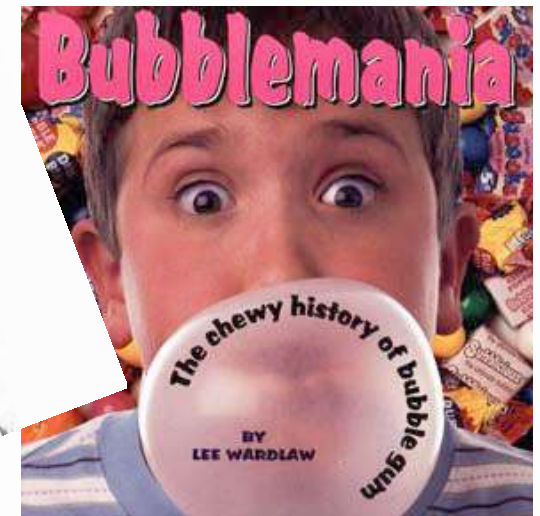
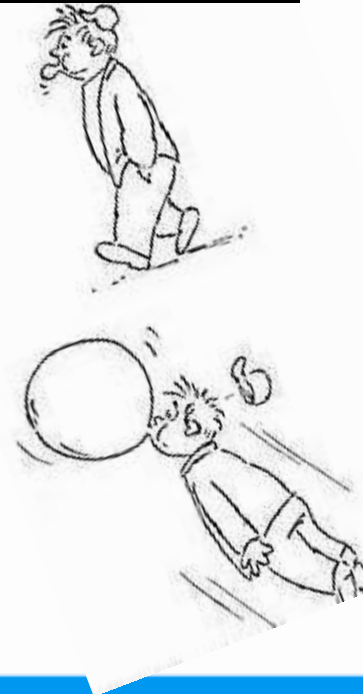
Greater interaction with technology



And of course ...

Mumbai	Andheri / Sakinaka
15%	28%

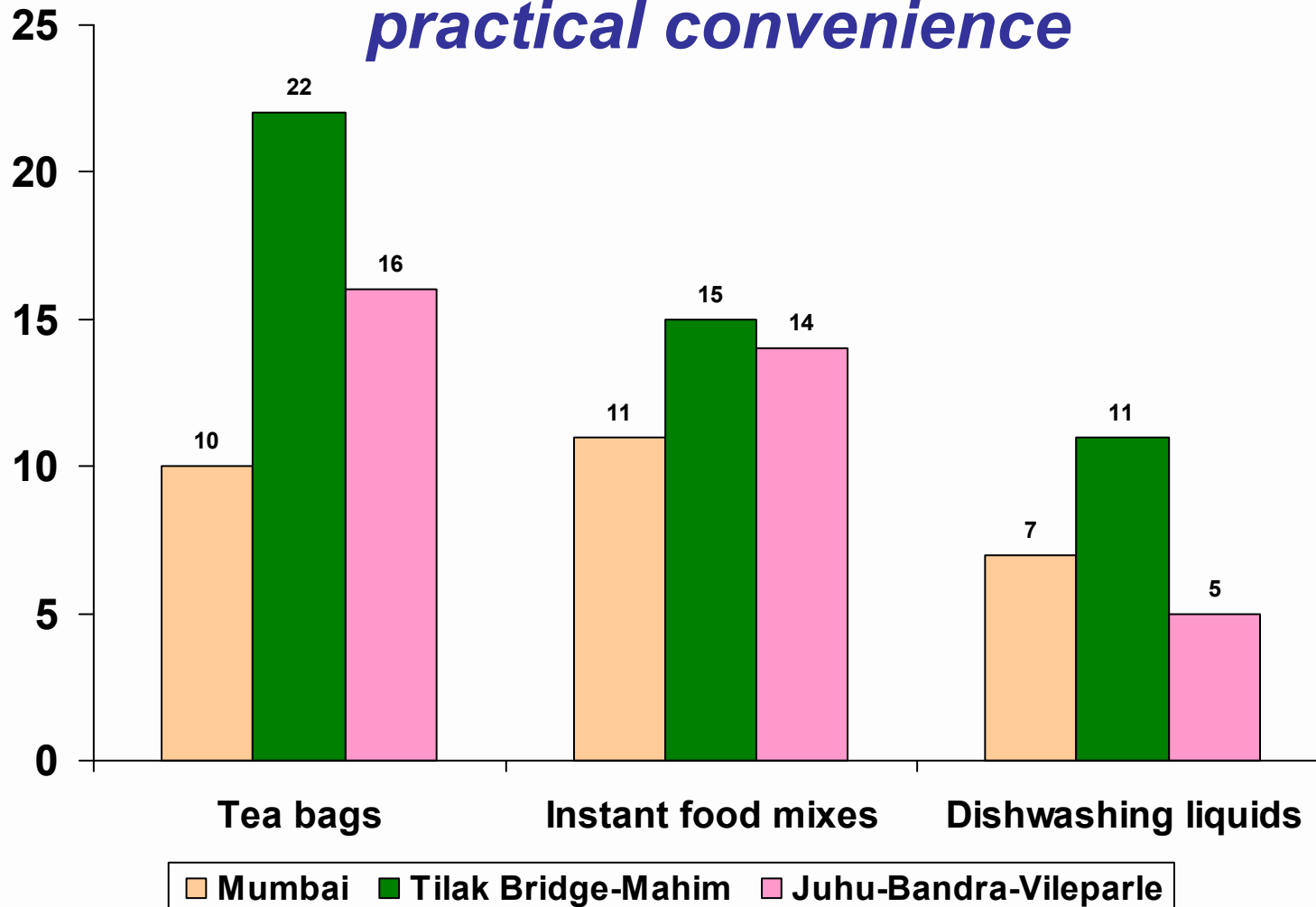
*Way too much
chewing gum!*



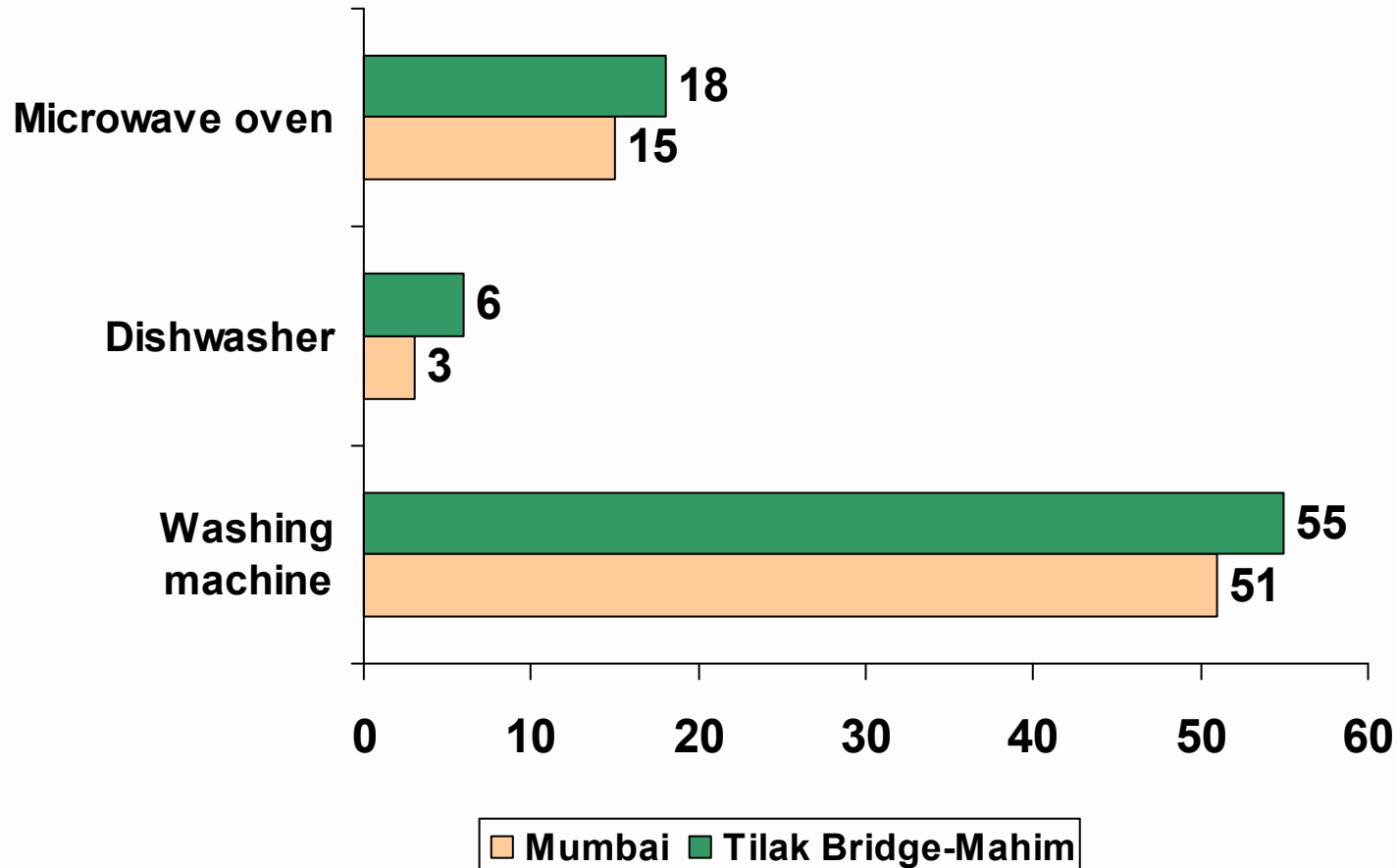
Prime targets for ...

1. Financial products?
2. Telecom?
3. Affordable fashion?
4. Alternative media?
5. Small indulgences?
6. Innovative ideas?

A difference reflected in usage of household products that offer practical convenience



And a small but consistent difference in ownership of 'convenience' led durables



Working women also feel 'justified' in spending on basic cosmetics ... it is important to look good at work!

(SEC A/B)	Mumbai	Tilak Bridge-Mahim
Perfume	19	27
Deodorant	14	21
Nail polish	21	25
Lipstick	17	23

Base *"make an effort"* 3668

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Implications for ...

1. Marketing convenience
 2. Marketing small indulgences
 3. The business of beauty and confidence
 4. Support systems for working women
- Food
 - Household care
 - Personal grooming
 - Child care
 - Support services
 - Retailing
 - Financial services



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