

Calatorie spre Centrul Retailului (3D)*

**ochelarii speciali se distribuie la intrarea in sala*

Conferinta Magazinul Progresiv
Martie 2009

nielsen

The Nielsen logo is displayed in a serif font. The letter 'n' is blue, while the remaining letters 'ielsen' are grey. Below the text, there is a horizontal row of nine grey dots, each centered under a letter: 'n', 'i', 'e', 'l', 's', 'e', 'n', and two additional dots at the end.

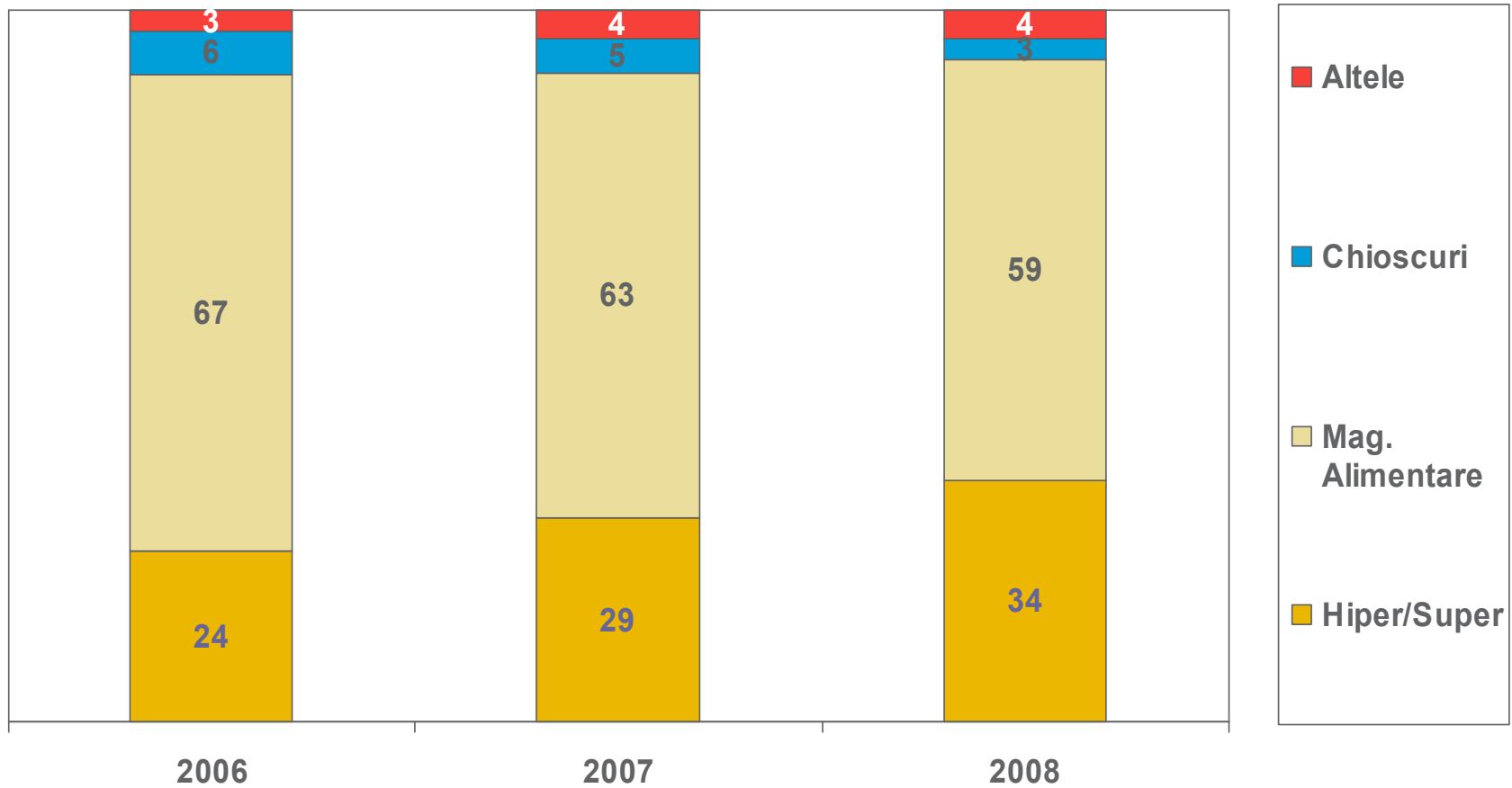
c#@?a

Previously on... Store Wars (episodul 2008)

- Comertul modern creste (incremental) in importanta, pe seama traditionalului
 - Consumatorii din urban se orienteaza tot mai mult catre hipermarketuri
 - Comertul traditional continua sa reprezinte 2/3 din retailul romanesc si creste in valoare absoluta
- Mai e inca (mult) loc de dezvoltare pentru comertul modern, avand in vedere peisajul general european
 - Pe termen lung, castiga teren hipermarketurile si discounterii

Modern vs. Traditional dupa inca un an...

Romania - Cota Valorica (%) din Total Retail



Sursa: Nielsen Retail Audit

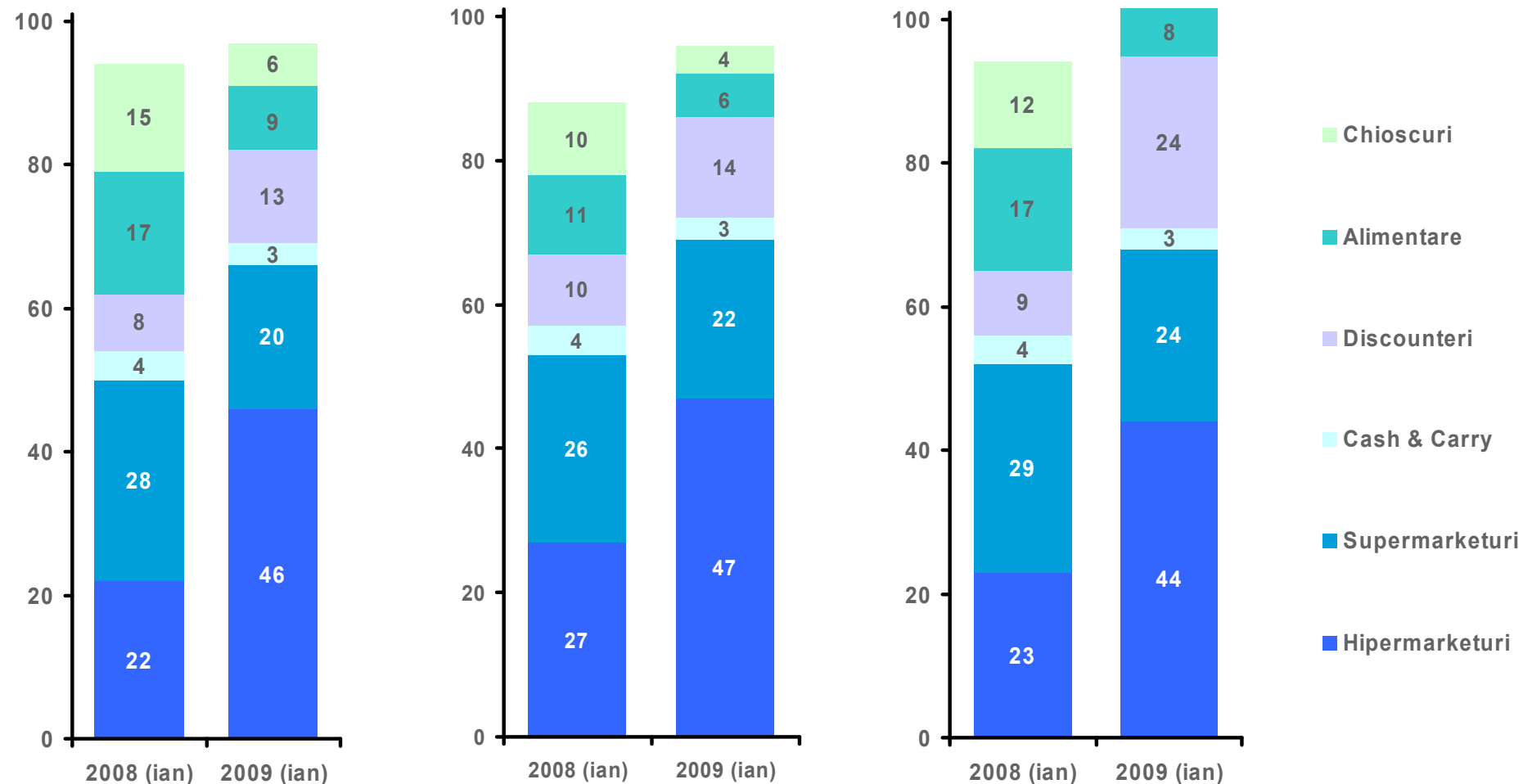
Preferinta pentru comertul modern s-a accentuat semnificativ in ultimul an (in orasele medii-mari)

Magazinul de unde cumpara cel mai frecvent....

Racoritoare

Cafea

Dulciuri



Sursa: Nielsen ShopperTrends 2009

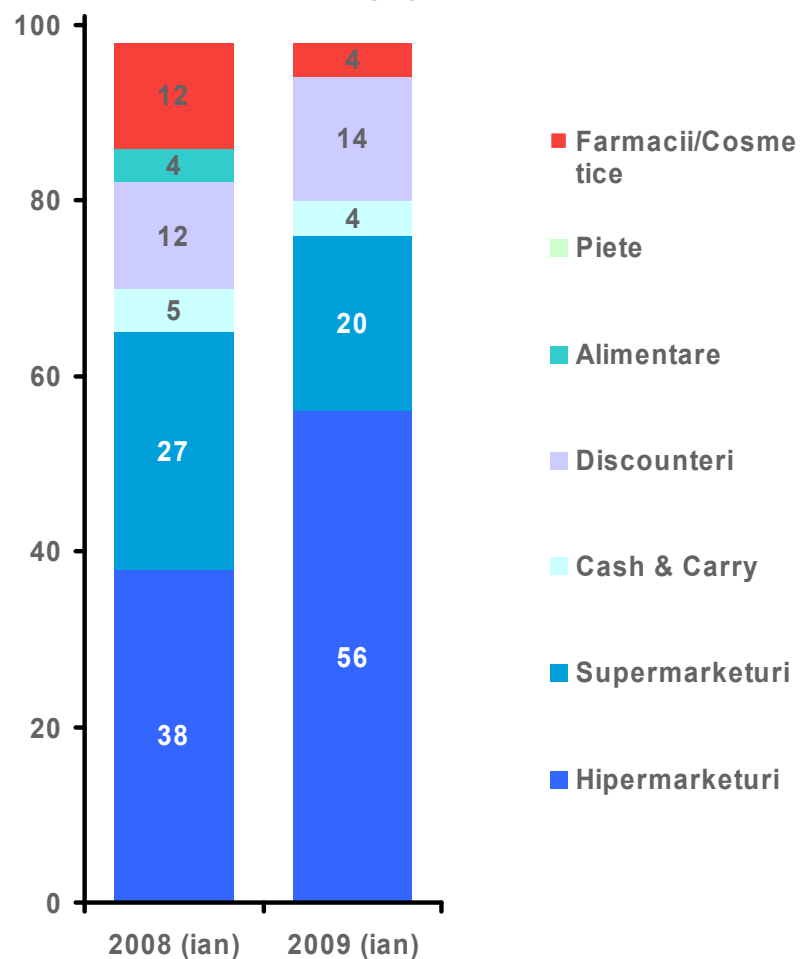
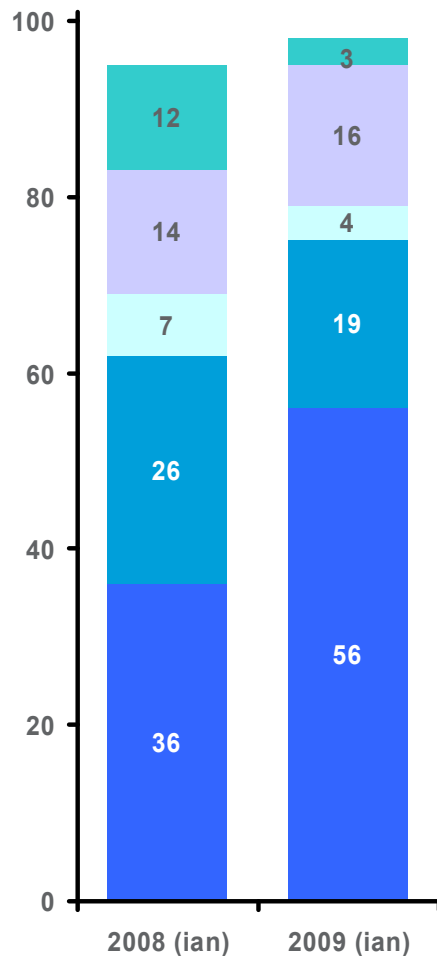
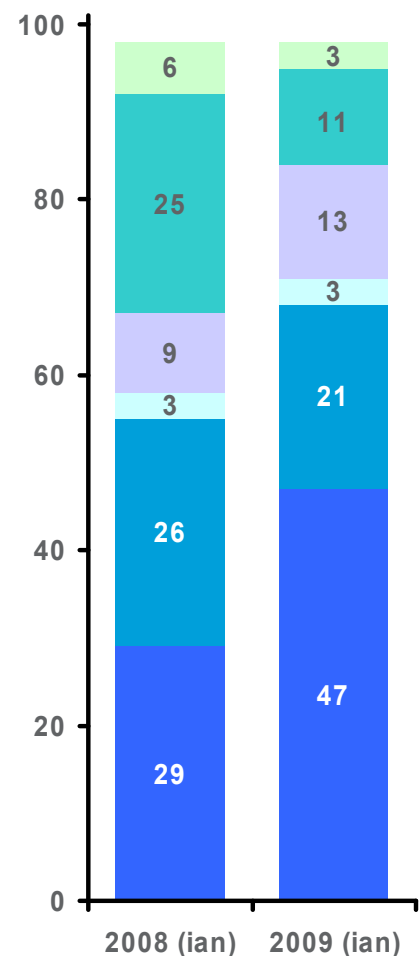
Preferinta pentru comertul modern s-a accentuat semnificativ in ultimul an (in orasele medii-mari)

Magazinul de unde cumpara cel mai frecvent....

Lactate

Alimente de baza

Produse de ingrijire personala

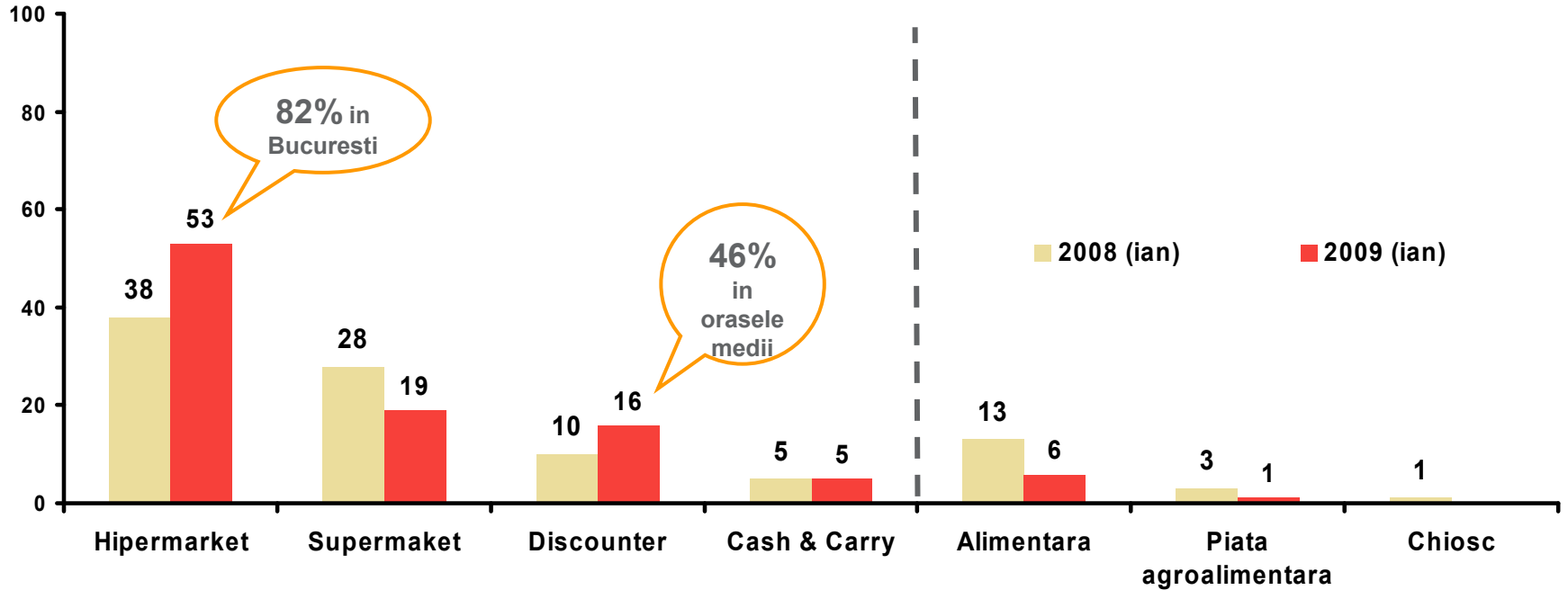


- Farmacii/Cosmetice
- Piete
- Alimentare
- Discounteri
- Cash & Carry
- Supermarketuri
- Hipermarketuri

Sursa: Nielsen ShopperTrends 2009

Din ce in ce mai multi bani sunt cheltuiti in comerțul modern

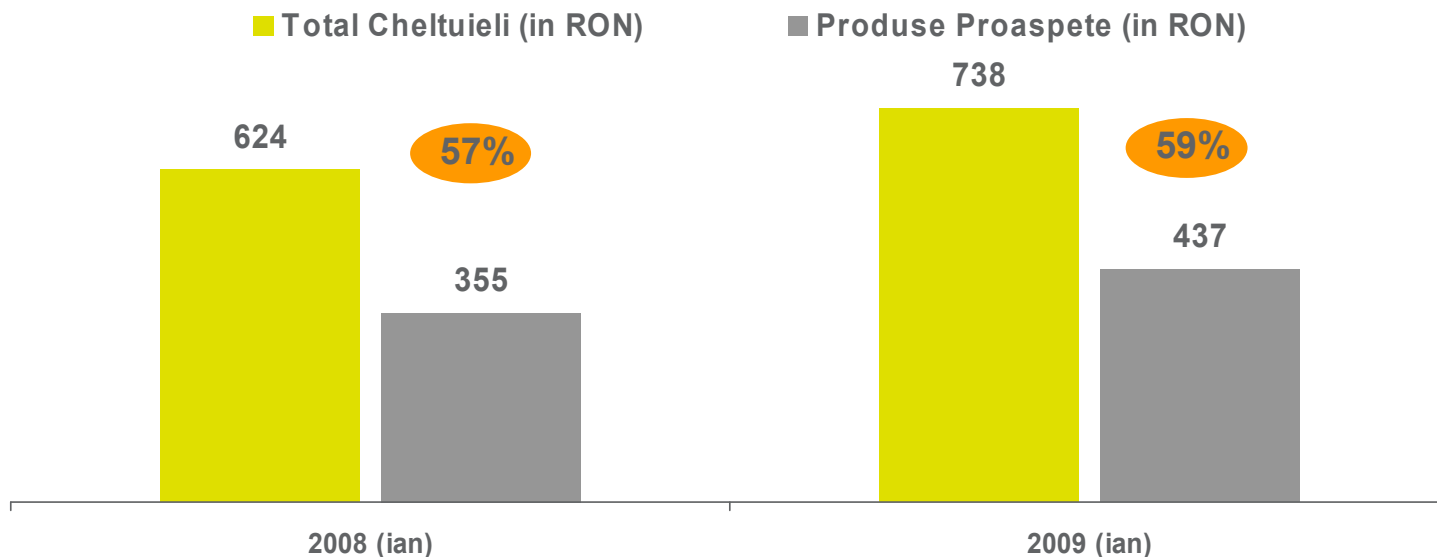
In ce magazine cheltuiti cea mai mare parte din bugetul familiei?



Sursa: Nielsen ShopperTrends 2009

Bugetul cheltuielilor lunare a inregistrat o crestere mai accentuata in 2008 fata de anul anterior

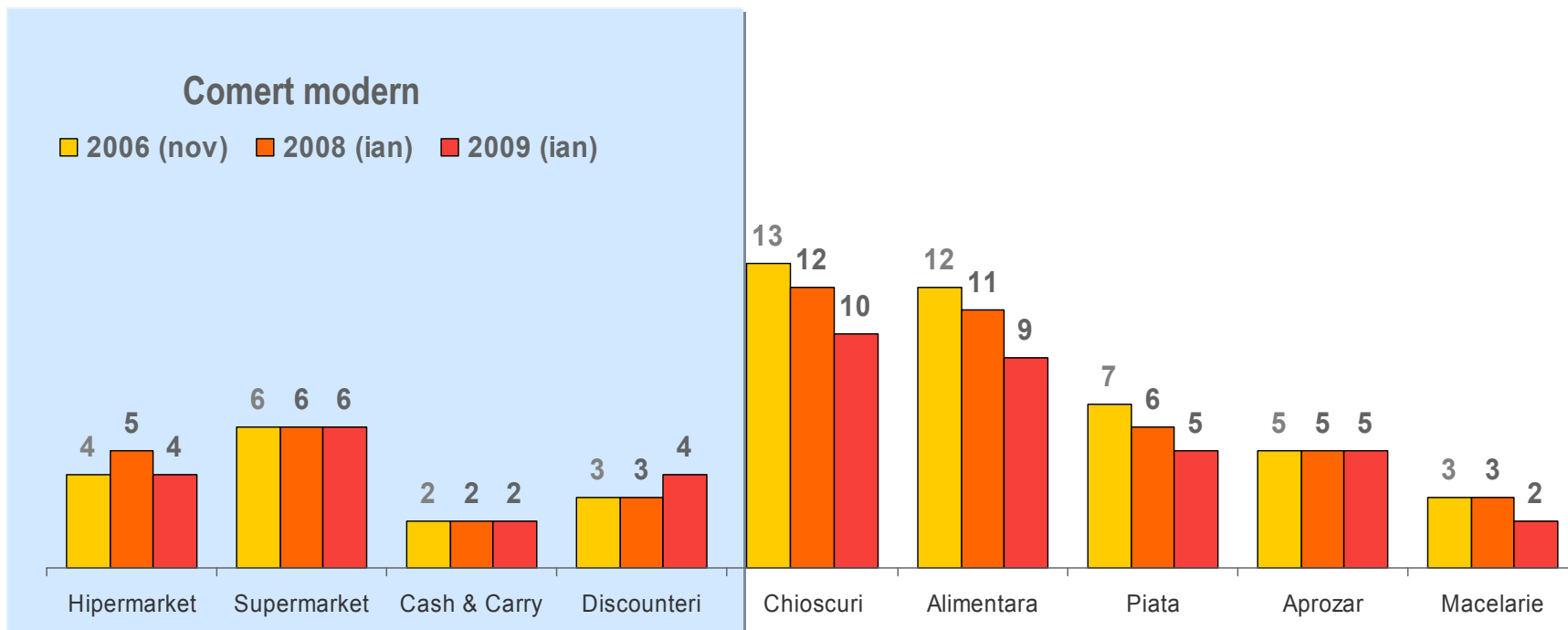
Q. Va rog sa estimati cam cat se cheltuie pe luna, in mod obisnuit, in gospodaria dvs. pentru produse alimentare, de bacanie si ingrijire personala...



Sursa: Nielsen ShopperTrends 2009

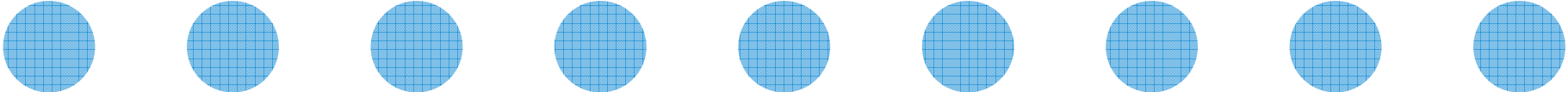
Mersul la cumparaturi ramane si in 2009 o activitate cu frecventa ridicata – chiar si in magazinele mari

Frecventa de vizitare a diverselor tipuri de magazine pe parcursul unei luni

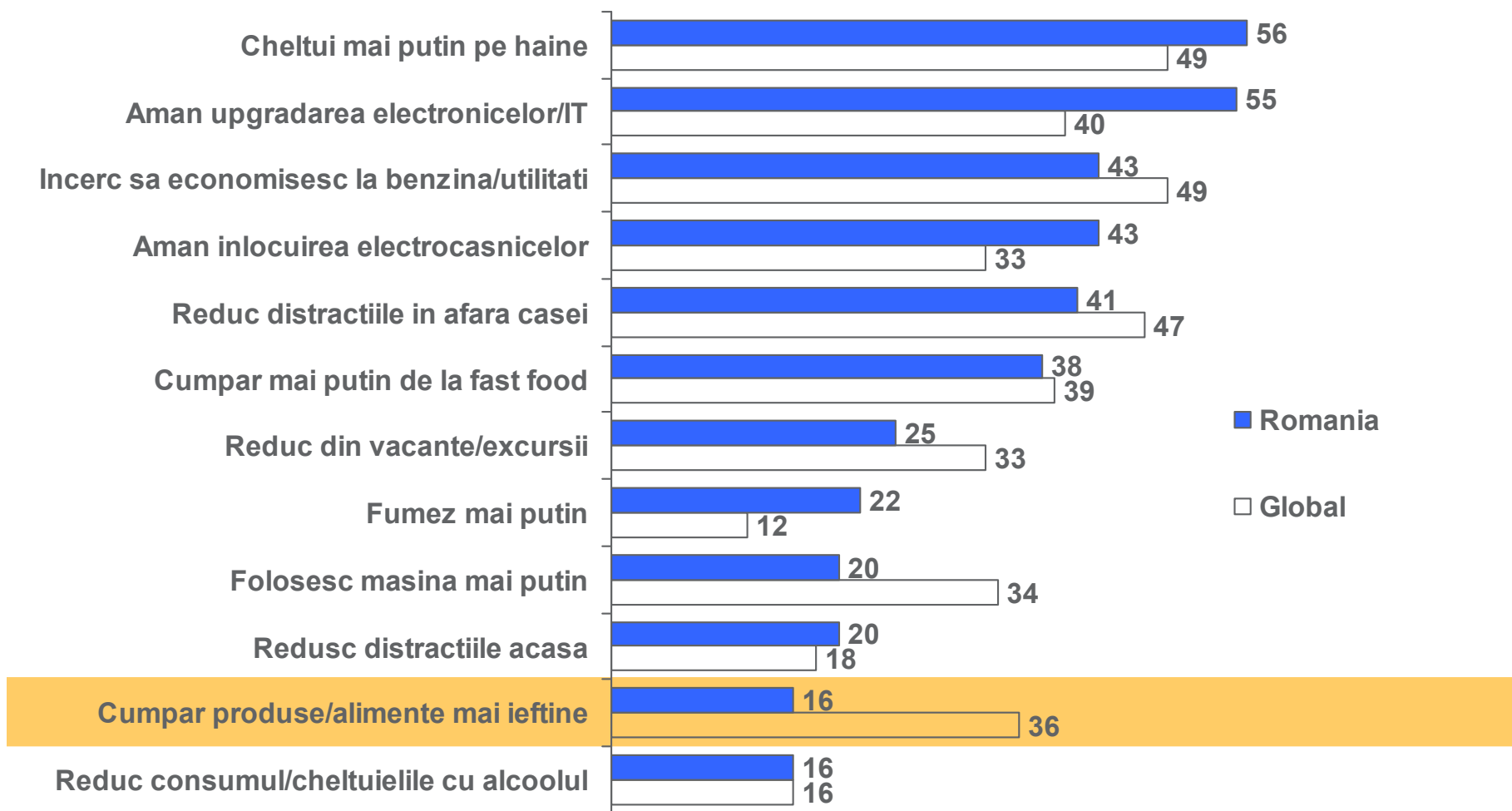


Sursa: Nielsen ShopperTrends 2009

Reactia consumatorilor in contextul actual

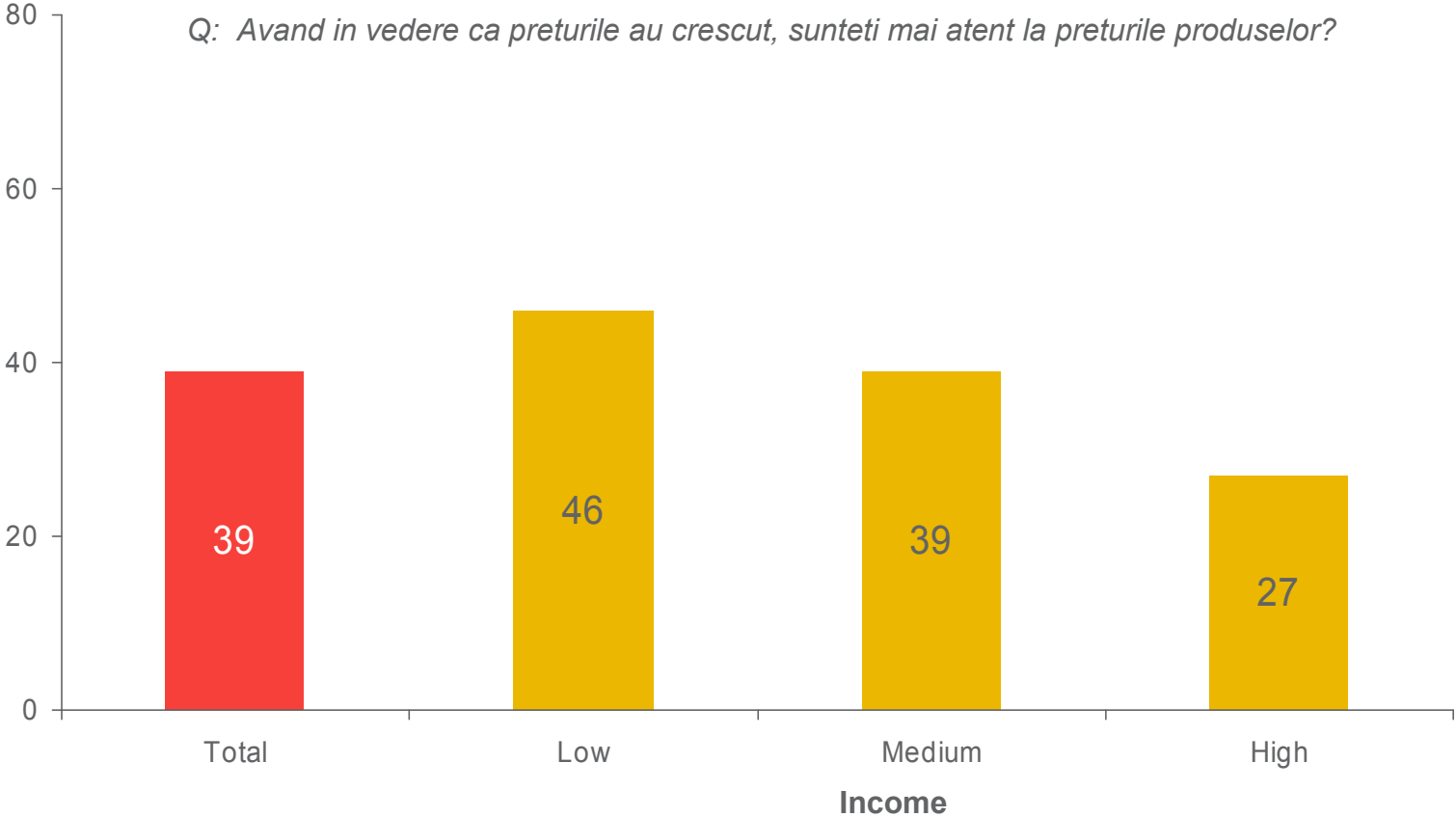


Ce sunt dispusi sa faca consumatorii in recesiune?



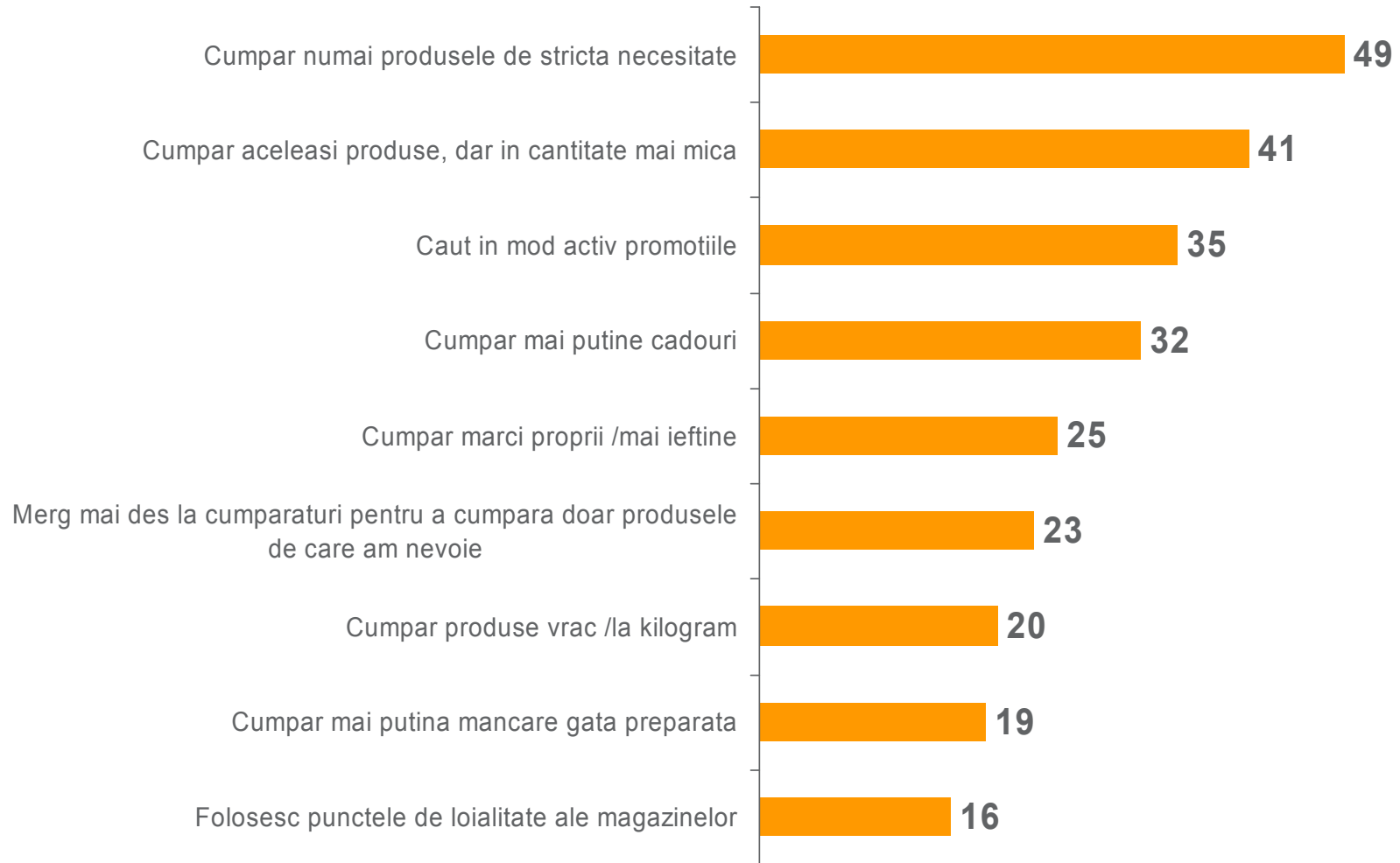
Source: Nielsen Global Online Consumer Survey Oct-08

2 din 5 consumatori sunt mai atenti la preturi decat in trecut



Sursa: Nielsen ShopperTrends 2009

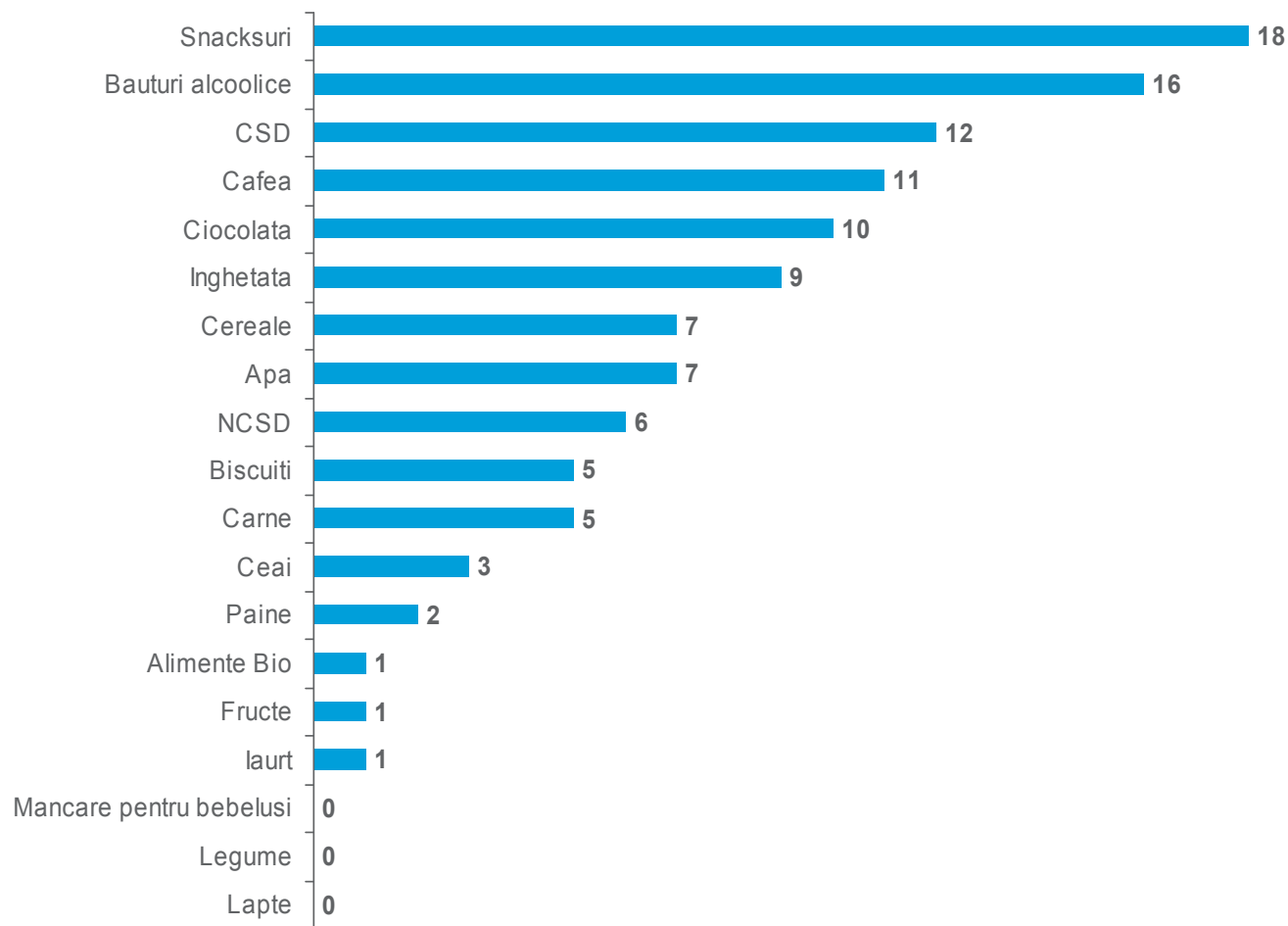
Cum poate afecta cresterea preturilor comportamentul consumatorilor



Sursa: Nielsen ShopperTrends 2009

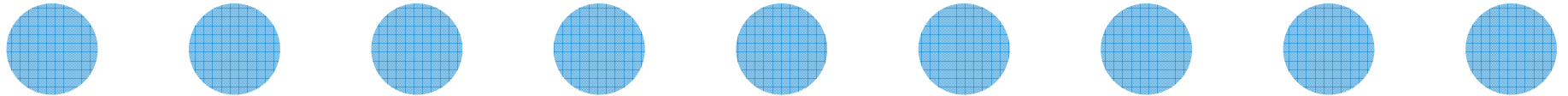
Categoriile ce ar putea fi afectate de cresterea preturilor

- Q: Avand in vedere ca pretul alimentelor creste, va rog sa-mi indicati care sunt primele trei produse de pe aceasta lista pe care le-ati cumpara mai putin? (primele 3 categorii)

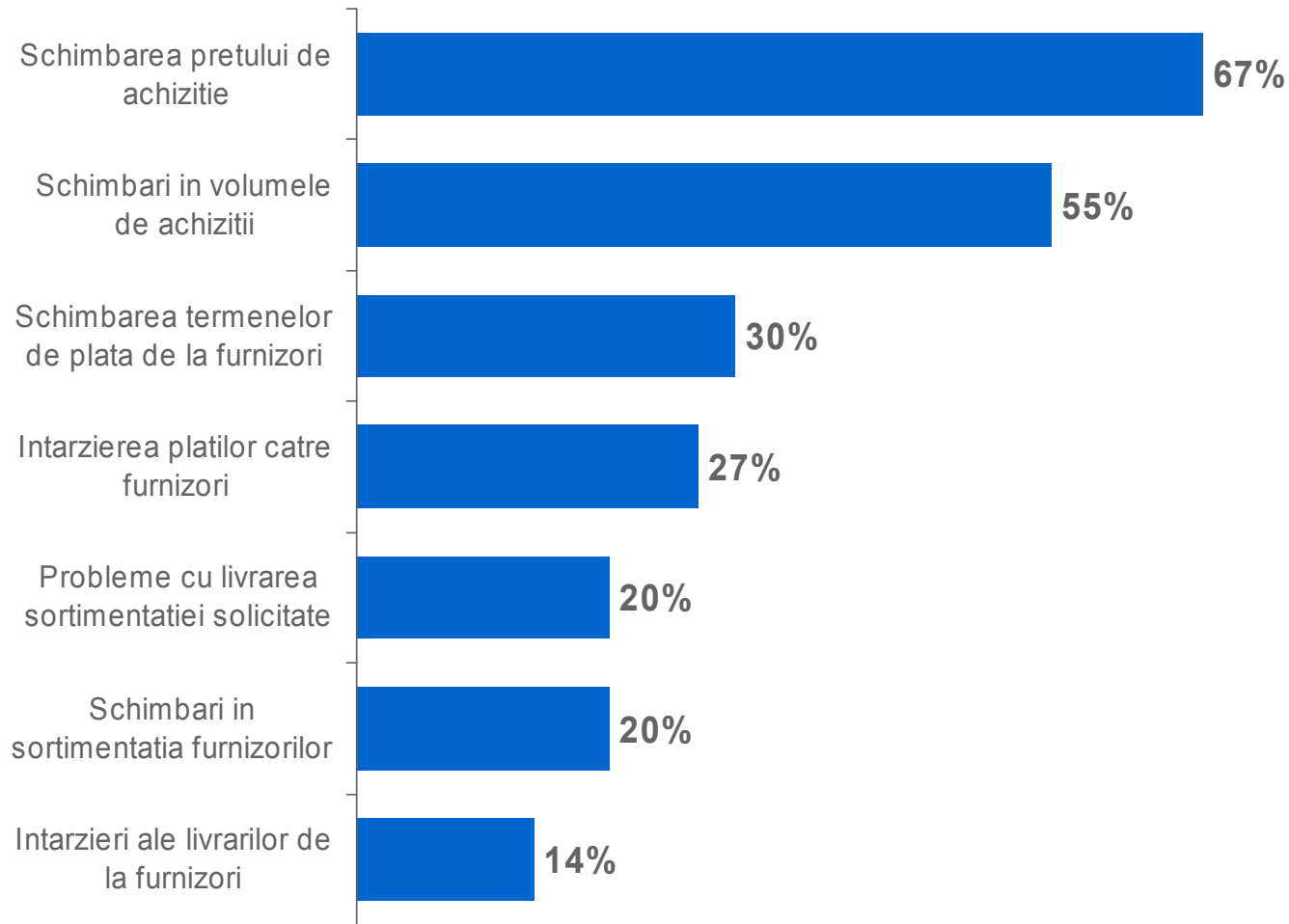


Sursa: Nielsen ShopperTrends 2009

Reactia Retailerilor in contextul actual

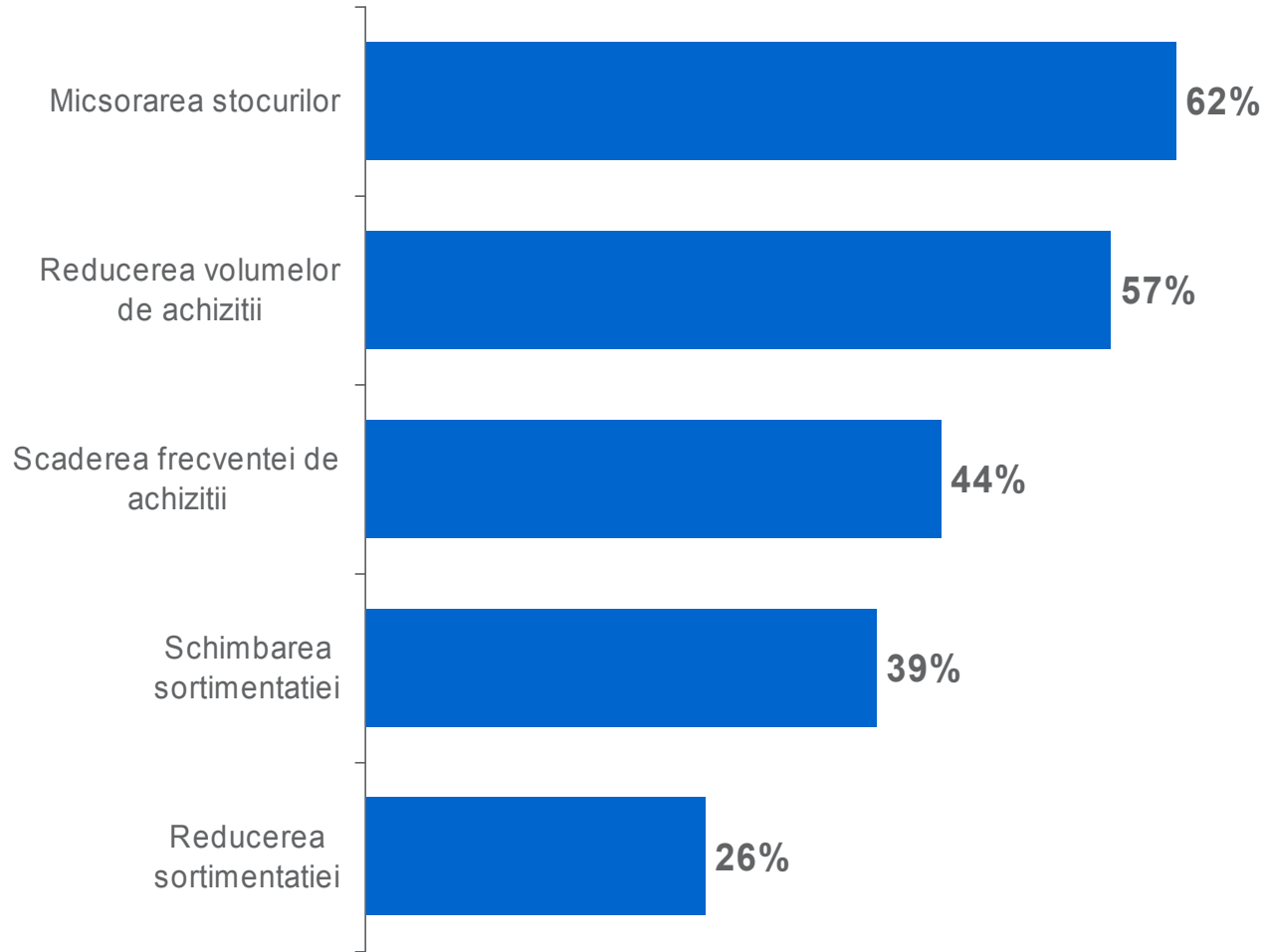


Dificultati, probleme intampinate de retaileri la inceputul anului



Sursa: Nielsen Retailer Confidence Mar-09

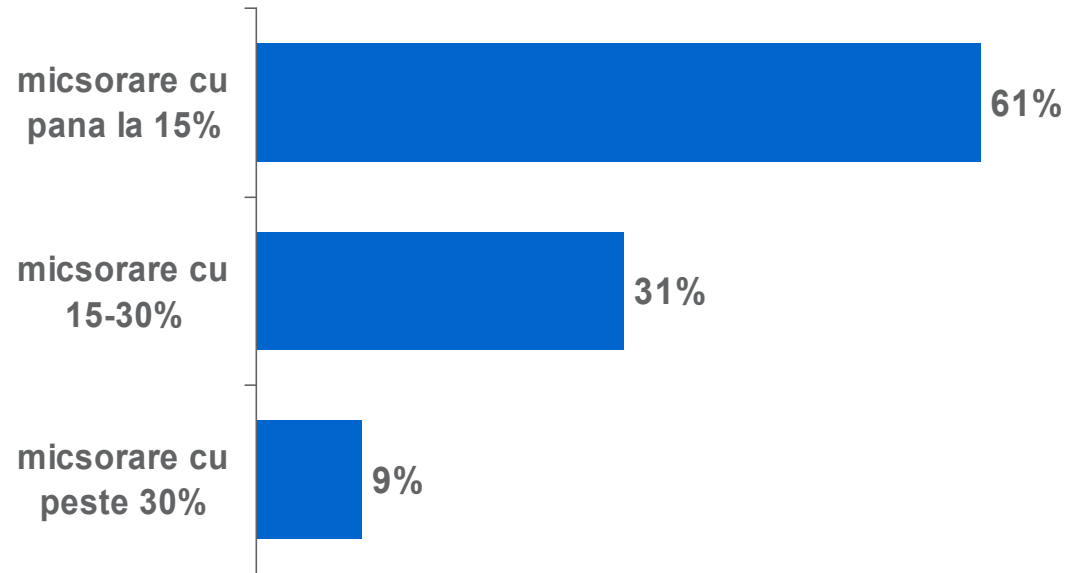
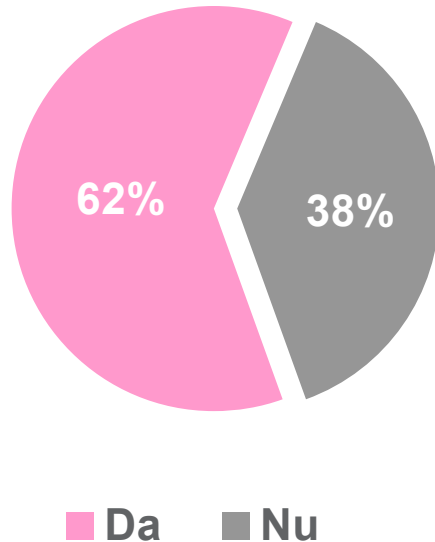
Masuri luate de retaileri la inceputul anului



Sursa: Nielsen Retailer Confidence Mar-09

Eventualele reduceri de stocuri in magazine sunt inca limitate

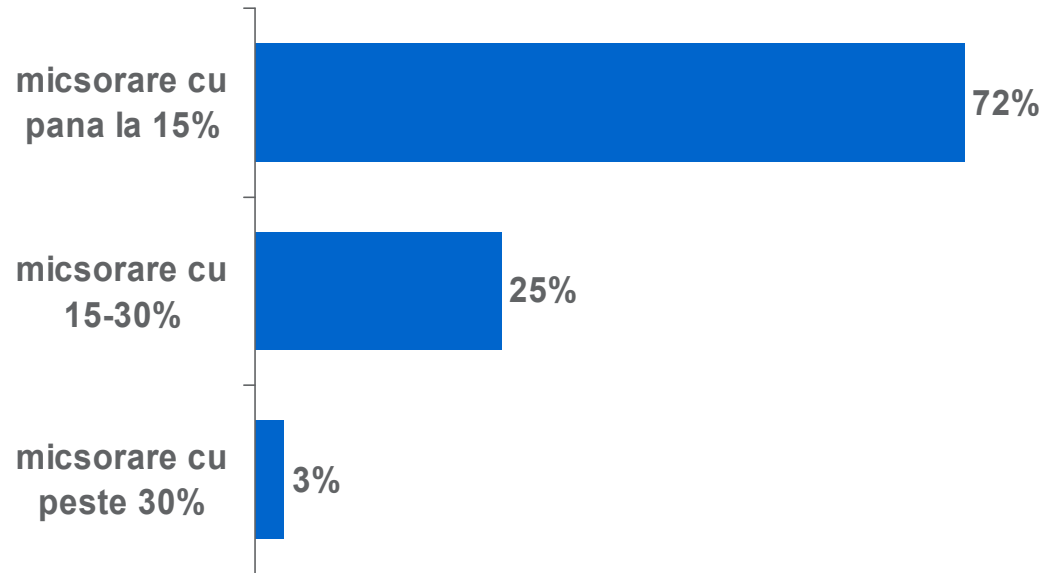
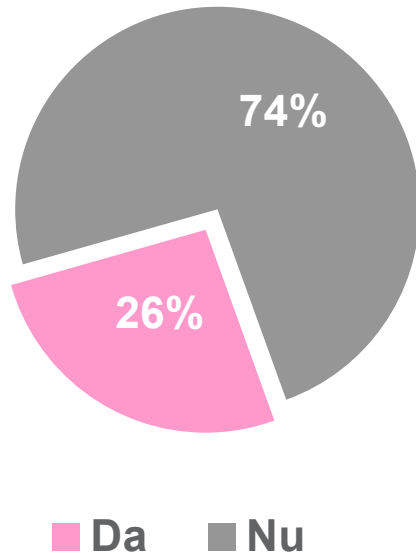
In contextul economic actual, ati inceput sa micorati stocurile in magazinul dvs.?



Sursa: Nielsen Retailer Confidence Mar-09

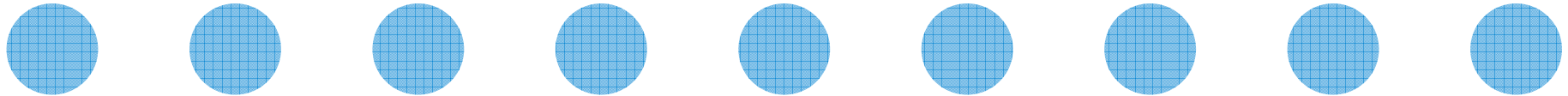
Schimbarile in sortimentatie nu ar trebui sa fie foarte vizibile pentru consumatori

In contextul economic actual, ati inceput sa reduceti sortimentatia in magazinul dvs.?



Sursa: Nielsen Retailer Confidence Mar-09

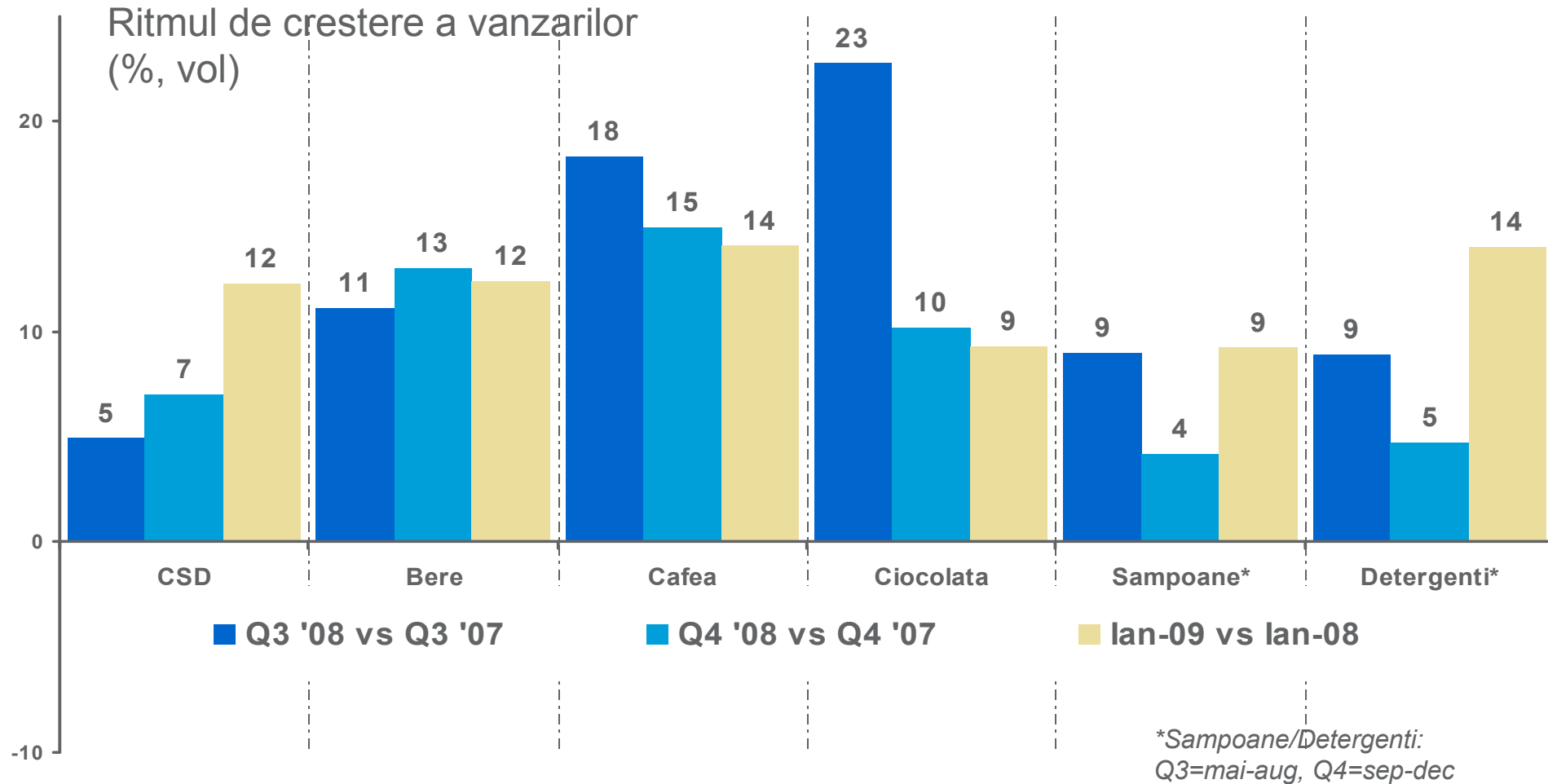
Recapitulare... si testul final



Deocamdata*, cumparatorii continua sa faca ceea ce stiu mai bine – adica sa cumpere

*ian 2009

Ritmul de crestere a vanzarilor
(%, vol)



*Sampoane/Detergenti:
Q3=mai-aug, Q4=sep-dec

Sursa: Nielsen Retail Audit

Va multumesc!

nielsen

The logo for Nielsen consists of the word "nielsen" in a serif font. The letter "n" is blue, while the remaining letters "iels en" are grey. Below the word is a horizontal row of nine grey dots, each centered under a letter: the first dot is under the "n", and the remaining eight dots are under the "i", "e", "l", "s", "e", "n" and the two spaces between them.