USING MARKET AT A GLANCE (M@AG) REPORTS

OVERVIEW
Use Market at a Glance Reports to better understand your market, the Nielsen product design and your retailers in a selected country and category. From a product design perspective, you can use the Industry Design Coverage and covered versus non-covered channels to clarify your Nielsen data scope. To better understand your market, view the information on macroeconomic stability, geographic coverage and country comparisons. Finally, access the information on the retail market structure, top five retailers and non-cooperating retailers for more insight on the retail composition.

Key features
- Reports available for 82 countries and 30 categories
- Coverage Walk shows Industry Design Coverage with covered and non-covered channels
- Cross-country comparison for 50+ countries
- Raw data extraction options (Available only in NIS webpage)
- Open to all global clients

Who should use the reports, and how often?
All Retail Measurement Service (RMS) users can use the information in the M@AG Reports to understand market and retail dynamics with details related to market population, retailer participation and coverage values.

How often you’ll use the reports will depend on your business, but you might explore topics like these:
- The total retail universe in markets of your interest and industry coverage by Nielsen
- Covered and non-covered channels
- Top retailers in your markets and categories
- The non-cooperating retailers in your markets and categories
- The comparison across markets on retail growth, modern trade, GDP or even population
- The Nielsen Design Coverage for different categories across markets
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NAVIGATING THE REPORTS

CONTACT - Information for M@AG support team

GLOSSARY - All definitions and variables used in the reports

COVERAGE WALK (PAGE 3) - Also known as the Industry Coverage Matrix (ICM); Shows Industry Design Coverage and covered and non-covered channels for 30+ categories

COUNTRY OVERVIEW (PAGE 4-5) - RMS overview with top retailers, non-cooperators, market indicators and service overview

MARKET DYNAMICS COUNTRY (PAGE 7) - Quantifies the market factors that impact the ability to measure markets consistently over time

DESIGN COVERAGE (PAGE 9) - Covered channel information for 50+ countries in one chart

CROSS COUNTRY COMPARISON (PAGE 6) - Charts can be populated for 50+ countries at a time

MARKET DYNAMICS RETAIL & MACRO DRIVERS (PAGE 8) - Retail and macro environment drivers causing volatility or stability in a country

UNIVERSE INFORMATION (PAGE 10) - Retail universe information at channel, store and trade type for 74 markets

ANNOTATION FEATURE*
*From the app only, you can mark relevant information and send via email directly from this report page. This feature is included on all reports, except Coverage Walk.

EXPORT FEATURE
Export your annotated report via email, save to photos or print the report.
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COVERAGE WALK

What it shows

Identify the most relevant non-covered channels for potential coverage investments and opportunities of category expansion using the Coverage Walk. These charts estimate the size and composition by channels for different retail categories in a given country. The most useful information on this report is the non-covered channels.

Business questions answered

- What channels does Nielsen measure for different categories?
- How does this differ in different countries?
- In the country of my interest, how are local channels mapped to the global channels?
- Where can I see expansion potential in channels that I don't subscribe to?
- Do we need to change our Nielsen channel measurement scope?

**CHANNEL CONTRIBUTION (%)**

Overall percentage of channel distribution between covered and non-covered channels.

**GLOBAL VS LOCAL STORE TYPES**

Displays all covered (top) and non-covered (bottom) channels, in order of importance, relative to the market in terms of sales value.

**CATEGORY LEVEL COVERAGE**

Review the category level coverage by channel(s) in a given country.
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COUNTRY OVERVIEW

What it shows

A handy RMS overview that describes:

- What geographies and outlets Nielsen covers in every country.
- Core Service Factors, like how many retail stores exist in the country, the Fast Moving Consumer Goods (FMCG) growth rates and the population percentage represented by the Nielsen service.
- Key cooperators and non-cooperators.

Business questions answered

- What are the geographic details for my coverage?
- How much of Nielsen historical data is available?
- Which outlets are covered? Not covered?
- What are the economic and population details of the market?
- Who are the most important retailers?
- Any retailers do not share data with Nielsen?
## Market Indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>Total number of people living in the selected country</td>
</tr>
<tr>
<td>Population Growth Rate</td>
<td>Compares the average annual percent change in populations</td>
</tr>
<tr>
<td>GDP Official Exchange Rate</td>
<td>Home-currency denominated annual GDP figure divided by the bilateral average US exchange rate with that country in that year</td>
</tr>
<tr>
<td>GDP Purchasing Power Parity</td>
<td>Sum value of all goods and services produced in the selected country valued at prices prevailing in the US in the year selected</td>
</tr>
<tr>
<td>GDP Growth Rate</td>
<td>How fast the selected country is growing</td>
</tr>
<tr>
<td>GINI Index</td>
<td>Measures the distribution of the selected country's income or wealth</td>
</tr>
</tbody>
</table>

## Core Service Factors

<table>
<thead>
<tr>
<th>Factor</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Universe Store Count</td>
<td>Number of stores that exist in the selected country</td>
</tr>
<tr>
<td>3 Yr CAGR (Total ACV/PCV)</td>
<td>3 Year CAGR calculated based on 4 Years of Total data (Modern Trade (MT), Traditional Trade (TT) and Mixed Trade (Mix TR))</td>
</tr>
<tr>
<td>Modern Trade Contribution</td>
<td>Percent of total sales volume accounted for by stores in Modern Trade</td>
</tr>
<tr>
<td>3 Yr CAGR (Total MT ACV/PCV)</td>
<td>3 Year CAGR calculated based on 4 Years of Total Modern Trade</td>
</tr>
<tr>
<td>Market Population Represented</td>
<td>Percentage of total category and country volume sales captured by Nielsen RMS</td>
</tr>
<tr>
<td>% Non-cooperators</td>
<td>Estimated percentage of total category and country volume sales from non-cooperating retailers</td>
</tr>
</tbody>
</table>
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CROSS COUNTRY COMPARISON

What it shows

See how you can capitalize on cross-country opportunities in this report. You can even compare up to 50 countries at one time.

Business questions answered

- Is there a way to compare countries of my choice on Market Indicators, such as population, GDP, etc.?
- Is there a way to compare countries of my choice on Core Service Factors, such as Retail Universe, Store Count, Non-cooperation percentage, etc.?
- Which countries have a higher modern trade contribution?
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Market Dynamics Country

What it shows

The Market Dynamic Index quantifies the factors that could potentially impact market measurement, i.e., retail trade and macro environmental changes in a country.

Business questions answered

- What is the overall volatility of a country in terms of both retail and macro environment factors?
- Which factors lead to the volatility in a country?
- What is the Nielsen Tier for a country and how can I incorporate it to compare data from different countries?

<table>
<thead>
<tr>
<th>Country</th>
<th>Tier Quadrant</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>Tier 3-Q9</td>
<td>More volatile macro - More volatile retail</td>
</tr>
<tr>
<td>Argentina</td>
<td>Tier 3-Q8</td>
<td>More volatile macro - Moderately volatile retail</td>
</tr>
<tr>
<td>Australia</td>
<td>Tier 1-Q2</td>
<td>Less volatile macro - Moderately volatile retail</td>
</tr>
</tbody>
</table>

Tier 4 countries, like Egypt and Bangladesh, have volatile macro and retail dynamics.

Tier 1 countries—like the US, UK and Germany—have stable macro and retail dynamics.

Find detailed descriptions around volatility level, including which macro/retail variables are responsible for high/low volatility within the country.

Find a complete list of each country's tier and position in a 9-block chart.
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MARKET DYNAMICS RETAIL & MACRO DRIVERS

What it shows

Once you know the status of a country by tier within the 9-block chart, you can view this report to find details around retail, macro, political, social and economical drivers that can potentially affect market measurement.

Business questions answered

- What are the Macro Drivers affecting the quality of data in a given set of countries?
- What are the Retail Drivers affecting the quality of data in a given set of countries?

The key changes depending on which driver you’re viewing.

Compare multiple countries for selected variable and know which factors are causing more volatility.
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DESIGN COVERAGE

What it shows

The Design Coverage report provides the Industry Design Coverage according to the Nielsen Retail Measurement Services. This report shows information for COVERED channels—outlets and geographies—only.

Business questions answered

- Where can I compare countries on the basis of channels Nielsen covers?
- Where can I see the design coverage by category across multiple countries?

Switch your view from tables to charts.
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UNIVERSE INFORMATION

What it shows

This report represents Nielsen's estimate for each country's overall retail trade universe. Simply put, the total number of stores in a country by channel, store type or trade type.

Business questions answered

- Where can I get accurate information about the evolution of retail trade in a market?
- Where can I get total number of stores by channel, store type or trade type?
- Which channel or store type is the most popular in the selected country?
- Where can I see modern trade versus traditional trade contribution in a country?

STORE COUNTS

Refers to estimated universe of stores, for the channels covered by Nielsen.

ALL COMMODITY VALUE (ACV) BY TRADE TYPE

Shows the contribution of modern, traditional or mixed trade to total sales in the country.