

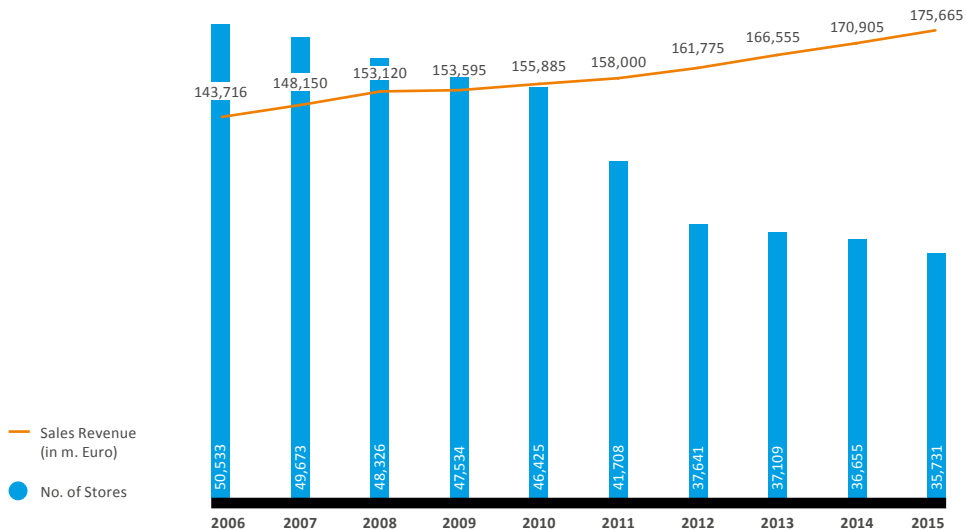
GERMANY 2016

RETAIL, CONSUMERS, ADVERTISING

nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

Food Retailers* and Drugstores



* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

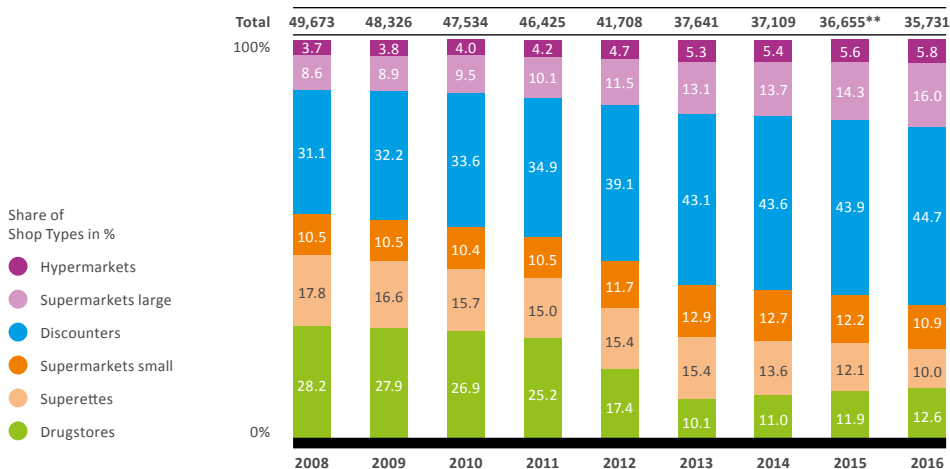
Food Retailers* and Drugstores – Shop Types

Shop Types	NO. OF STORES					SALES REVENUE (IN M. EURO)				
	01.01.2015 **		01.01.2016		Changes in %	2014 **		2015		Changes in %
	abs.	%	abs.	%		abs.	%	abs.	%	
Hypermarkets total	7,374	20.3	7,785	21.8	+5.6	74,262	42.9	76,200	43.4	2.6
Hypermarkets (≥ 2,500 sqm)	2,062	5.7	2,082	5.8	+1.0	44,191	25.5	44,725	25.5	1.2
Supermarkets large (1,000 - 2,499 sqm)	5,312	14.6	5,703	16.0	+7.4	30,071	17.4	31,475	17.9	4.7
Discounters	16,093	44.3	15,968	44.7	-0.8	65,835	38.0	67,005	38.1	1.8
Supermarkets total	8,510	23.4	7,467	20.9	-12.3	19,211	11.1	17,660	10.1	-8.1
Small (400 - 999 sqm)	4,242	11.7	3,880	10.9	-8.5	15,481	8.9	14,212	8.1	-8.2
Superettes (100 - 399 sqm)	4,268	11.7	3,587	10.0	-16.0	3,730	2.2	3,448	2.0	-7.6
Drugstores	4,349	12.0	4,511	12.6	+3.7	13,825	8.0	14,800	8.4	7.1
Total	36,326		35,731		-1.6	173,133		175,665		1.5

* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

** Adjustment of data of previous year because of improved information due to increased integration of census data.

Food Retailers* and Drugstores Number of Stores – Long-term Trend of Shop Types



* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

** Adjustment of data of previous year because of improved information due to increased integration of census data.

Food Retailers* and Drugstores

Number of Stores – Long-term Trend of Shop Types

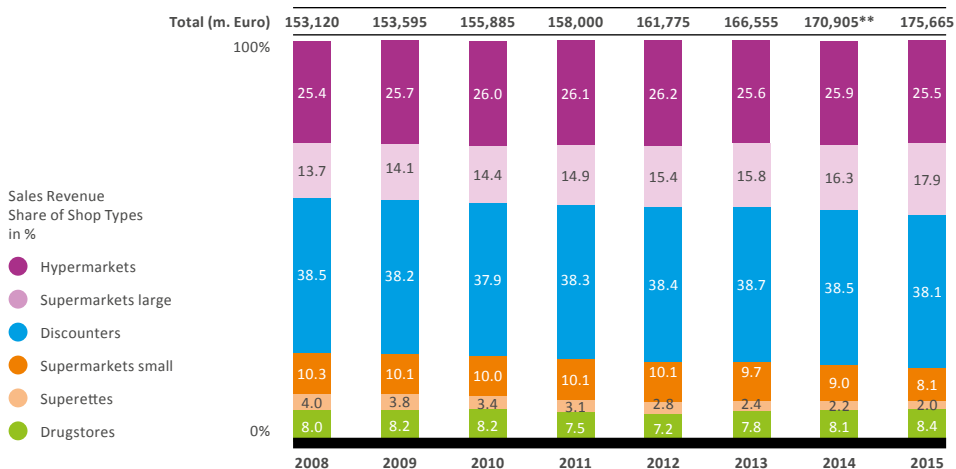
No. of Shop Types absolute

	01.01.09	01.01.10	01.01.11	01.01.12	01.01.13	01.01.14	01.01.15	01.01.16
Hypermarkets total	6,163	6,424	6,652	6,788	6,945	7,100	7,291	7,785
Hypermarkets	1,855	1,891	1,956	1,972	2,002	2,018	2,062	2,082
Supermarkets large	4,308	4,533	4,696	4,816	4,943	5,082	5,229	5,703
Discounters	15,573	15,951	16,193	16,320	16,218	16,169	16,093	15,968
Superm. small + Superettes	13,098	12,385	11,870	11,330	10,677	9,753	8,922	7,467
Supermarkets small	5,090	4,922	4,888	4,897	4,871	4,694	4,482	3,880
Superettes	8,008	7,463	6,982	6,433	5,806	5,059	4,440	3,587
Drugstores	13,492	12,774	11,710	7,270	3,801	4,087	4,349	4,511
Total	48,326	47,534	46,425	41,708	37,641	37,109	36,655**	35,731

* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

** Adjustment of data of previous year because of improved information due to increased integration of census data.

Food Retailers* and Drugstores Sales Revenue – Long-term Trend of Shop Types



* Food Retailers \geq 100 sqm incl. Aldi, Lidl, Norma

** Adjustment of data of previous year because of improved information due to increased integration of census data.

Food Retailers* and Drugstores Sales Revenue – Long-term Trend of Shop Types

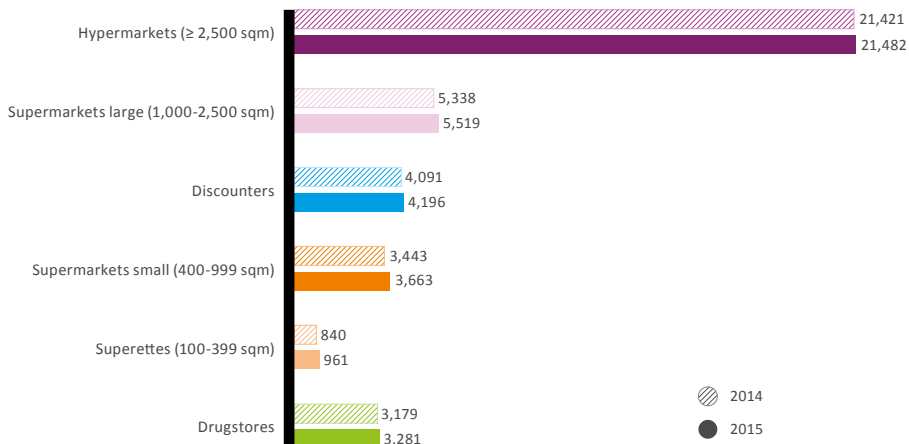
Sales Revenue in m. Euro

	2008	2009	2010	2011	2012	2013	2014	2015
Hypermarkets total	59,925	61,005	63,060	64,695	67,140	68,975	72,085	76,200
Hypermarkets	38,920	39,400	40,550	41,220	42,305	42,665	44,170	44,725
Supermarkets large	21,005	21,605	22,510	23,475	24,835	26,310	27,915	31,475
Discounters	59,025	58,645	59,030	60,525	62,175	64,480	65,835	67,005
Superm. small + Superettes	21,885	21,275	20,950	20,890	20,785	20,165	19,160	17,660
Supermarkets small	15,695	15,505	15,615	15,915	16,300	16,165	15,430	14,212
Superettes	6,190	5,770	5,335	4,975	4,485	4,000	3,730	3,448
Drugstores	12,285	12,670	12,845	11,890	11,675	12,935	13,825	14,800
Total	153,120	153,595	155,885	158,000	161,775	166,555	170,905**	175,665

* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

** Adjustment of data of previous year because of improved information due to increased integration of census data.

Food Retailers* and Drugstores Average Revenue 2014 and 2015 per Store in 1,000 Euro



* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

Nielsen Areas/Micro Regions

Area 1

Hamburg, Bremen,
Schleswig-Holstein, Lower Saxony

1 Brunswick	2 Hanover
3 Lüneburg	4 Hamburg
5 Schleswig-Holstein	6 Bremen/Weser-Ems

Area 2

Nord-Rhine Westphalia

7 Arnsberg	8 Detmold
9 Dusseldorf	10 Cologne
11 Münster	

Area 3a

Hessen, Rhineland-Palatinate,
Saarland

12 Darmstadt	13 Gießen
14 Kassel	15 Koblenz/Trier
16 Rhinehessen-Palatinate	17 Saarland

Area 3b

Baden-Württemberg

18 Freiburg	19 Karlsruhe
20 Stuttgart	21 Tübingen

Area 5+6

Berlin, Mecklenburg-West
Pomerania, Brandenburg,
Saxony-Anhalt

29 Berlin
30 Brandenburg
31 Mecklenburg-Vorpommern
32 Saxony-Anhalt

Area 7

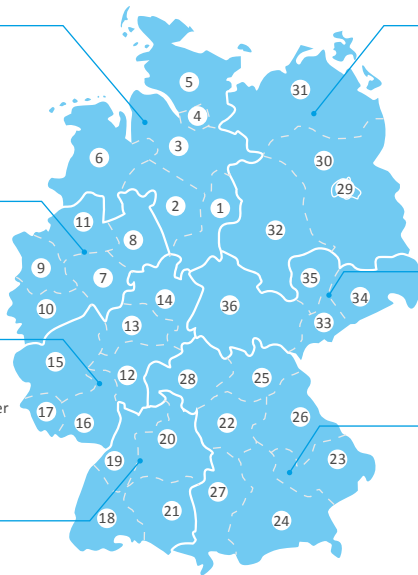
Thuringia, Saxony

33 Chemnitz
34 Dresden
35 Leipzig
36 Thuringia

Area 4

Bavaria

22 Central Franconia
23 Lower Bavaria
24 Upper Bavaria
25 Upper Franconia
26 Upper Palatinate
27 Swabia
28 Lower Franconia



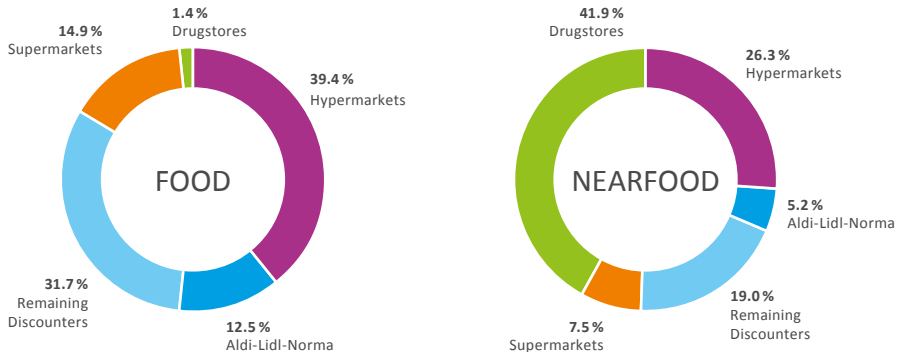
Food Retailers* and Drugstores

Nielsen Areas		NO. OF STORES					SALES REVENUE (IN M. EURO)				
		01.01.2015 *		01.01.2016		Changes in %	2014 **		2015		Changes in %
		abs.	%	abs.	%		abs.	%	abs.	%	
1		4,836	17.5	4,752	17.6	-1.7	23,473	18.0	23,541	17.8	0.3
2		5,252	19.0	5,088	18.8	-3.1	26,377	20.2	26,591	20.1	0.8
3a		3,604	13.1	3,494	12.9	-3.1	18,426	14.1	18,771	14.2	1.9
3b		3,297	11.9	3,220	11.9	-2.3	15,937	12.2	16,204	12.2	1.7
4		4,494	16.3	4,537	16.8	1.0	19,055	14.6	19,650	14.8	3.1
5+6		3,614	13.1	3,542	13.1	-2.0	16,188	12.4	16,329	12.3	0.9
7		2,498	9.1	2,408	8.9	-3.6	11,227	8.6	11,289	8.5	0.6
Total		27,595		27,041		-2.0	130,683		132,375		1.3

* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma

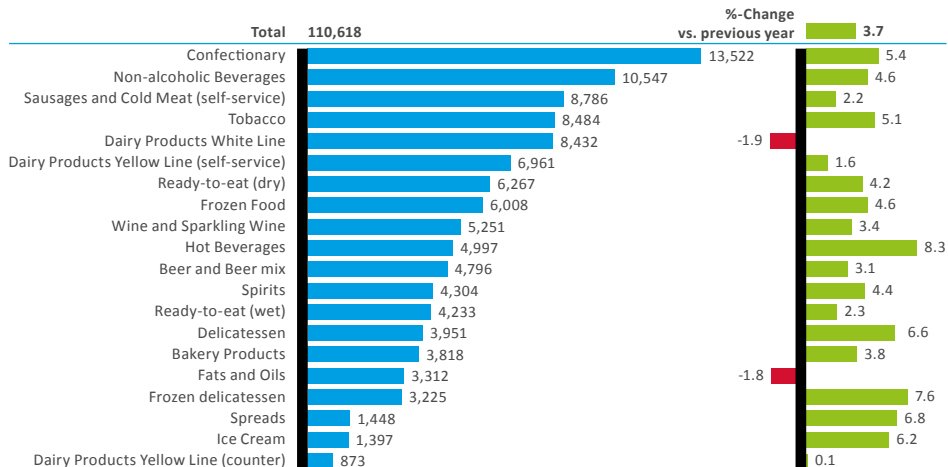
** Adjustment of data of previous year because of improved information due to increased integration of census data.

Category Trends Food and Nearfood 2015 – Market Shares by Sales Channels



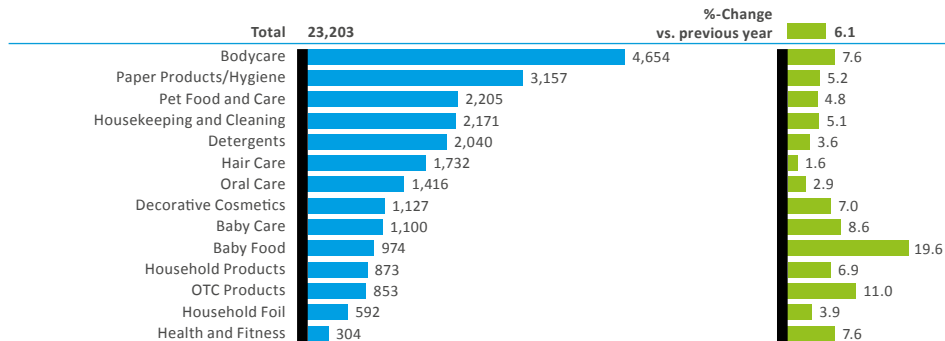
Basis: Nielsen MarketTrack; Food retailers and drugstores sales revenue of 475 Food and Nearfood commodity groups in 2015

Trends in Food Categories – Sales Development 2015 in Food Retailing* and Drugstores (in m. Euro)



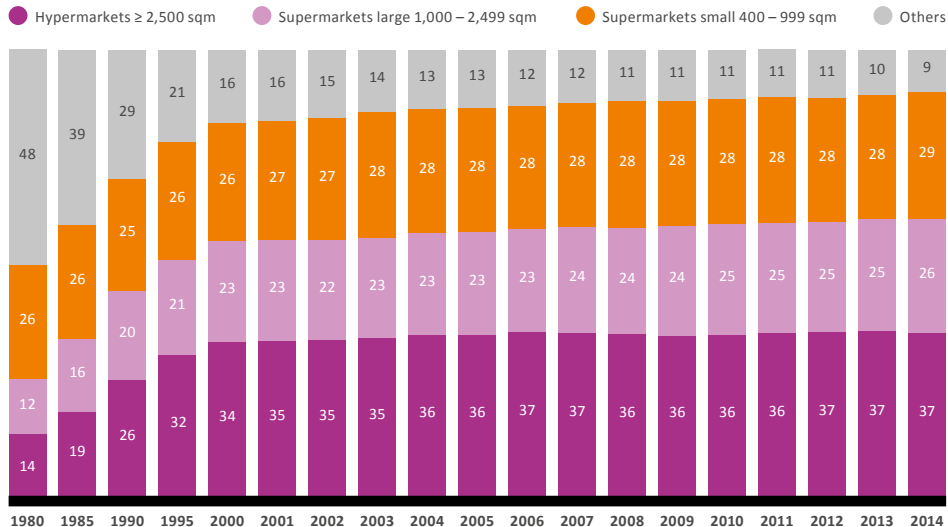
* Food Retailers ≥ 100 sqm incl. Aldi, Lidl, Norma
Basis: Nielsen MarketTrack; Food retailers and drugstores sales revenue of 475 Food and Nearfood commodity groups in 2015

Trends in Nearfood Categories – Sales Development 2015 in Food Retailing* and Drugstores (in m. Euro)



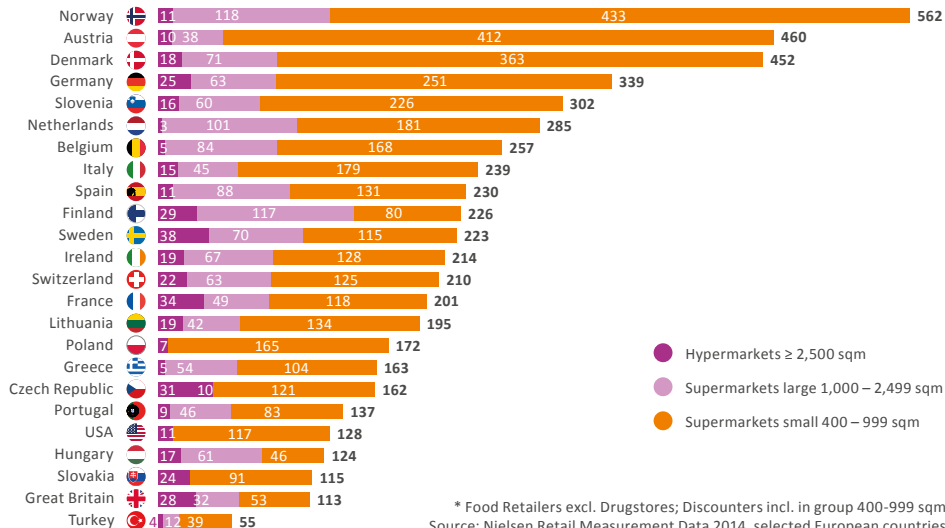
* Food Retailers \geq 100 sqm incl. Aldi, Lidl, Norma
Basis: Nielsen MarketTrack; Food retailers and drugstores sales revenue of 475 Food and Nearfood commodity groups in 2015

Food Retailing* Shop Types Europe – Sales Development and Structural Change in %

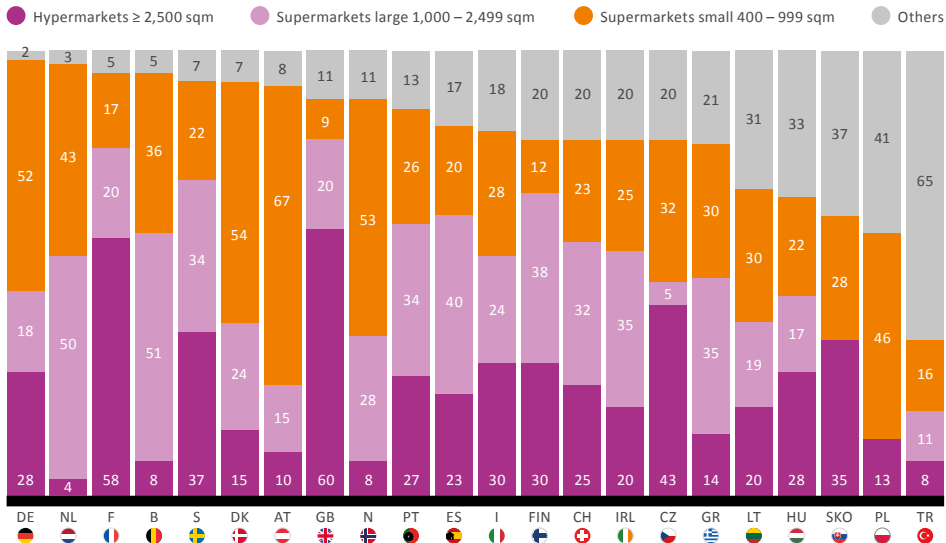


* Food Retailers excl. Drugstores; Discounters incl. in group 400-999 sqm
 Source: Nielsen Retail Measurement Data 2014, selected European countries

Food Retailing* Shop Types by Country – No. of Stores > 400 sqm per 1 Million Inhabitants



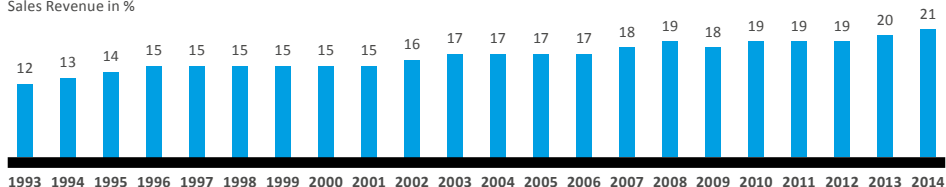
Food Retailing* Shop Types by Country – Sales Revenue in %



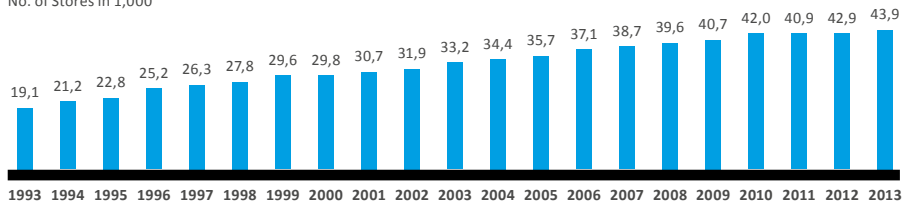
* Food Retailers excl. Drugstores; Discounters incl. in group 400-999 sqm
 Source: Nielsen Retail Measurement Data 2014, selected European countries

Discounters in Europe – Share of Sales Revenue in Food Retailing and No. of Stores

Sales Revenue in %



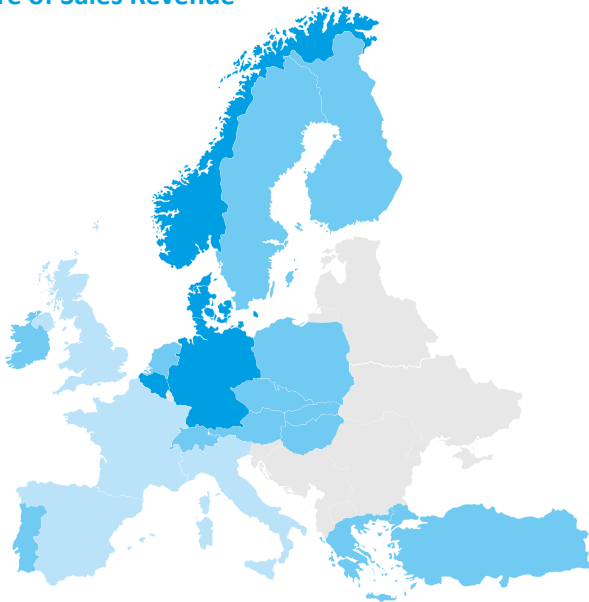
No. of Stores in 1,000



Source: Nielsen Retail Measurement Data 2013/2014, selected European countries

Discounters in Europe – Share of Sales Revenue in Food Retailing

- Less than 15 %
- 15 % - 30 %
- over 30 %



Convenience Channels

	NO. OF STORES			SALES REVENUE (IN M. EURO)		
	01.01.2015 abs.	01.01.2016 abs.	Change in %	2014 abs.	2015 abs.	Change in %
Gas Stations	14,209	14,176	-0.2	8,710	8,740	0.3
Impulse Channel	48,570	48,370	-0.4			

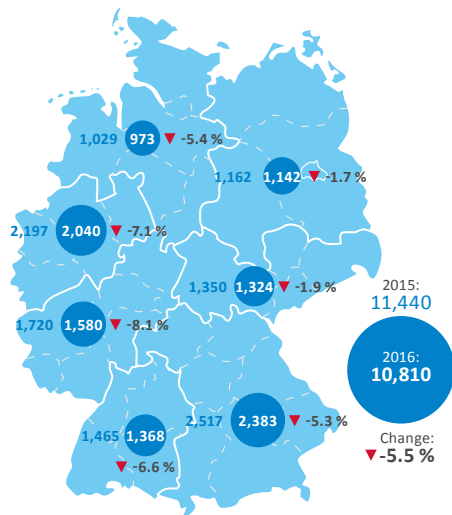
The Impulse Channel contains: kiosks, bakeries and grocery stores < 100 sqm
The projection is based on the number of stores

Cash & Carry

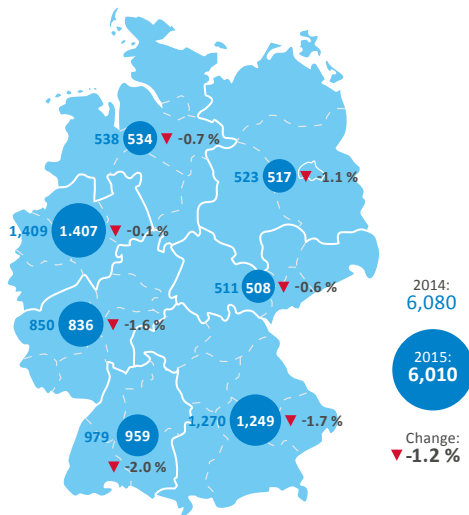
	NO. OF STORES			SALES REVENUE (IN M. EURO)		
	01.01.2015 abs.	01.01.2016 abs.	Change in %	2014 abs.	2015 abs.	Change in %
Cash & Carry	363	362	-0.3	10,930	10,635	-2.7

Beverage Stores

No. of Stores

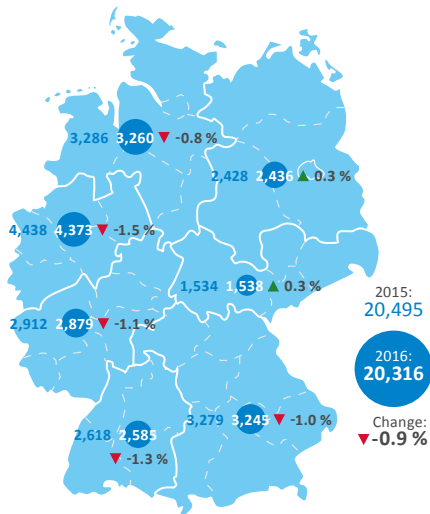


Sales Revenue (in m. Euro)

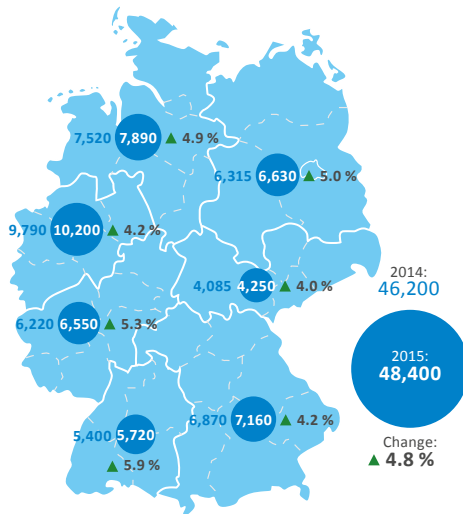


Pharmacies

No. of Stores

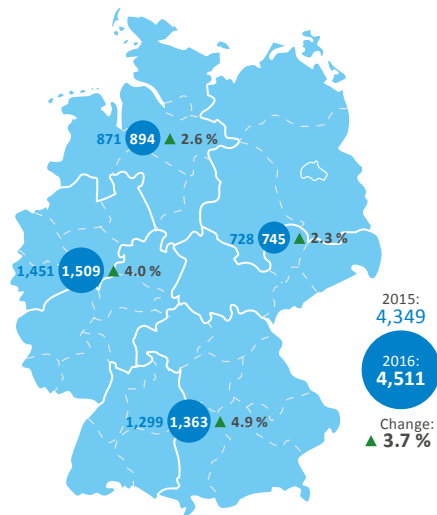


Sales Revenue (in m. Euro)

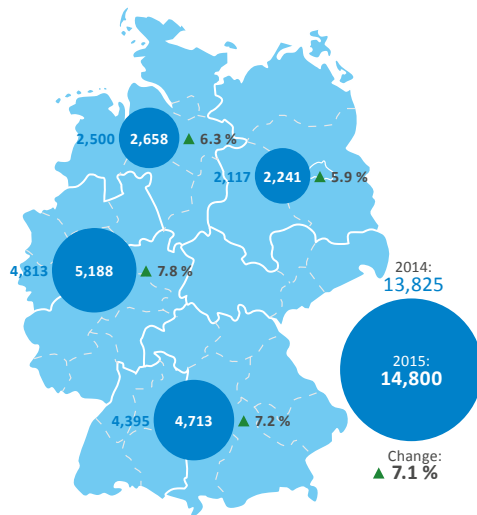


Drugstores

No. of Stores

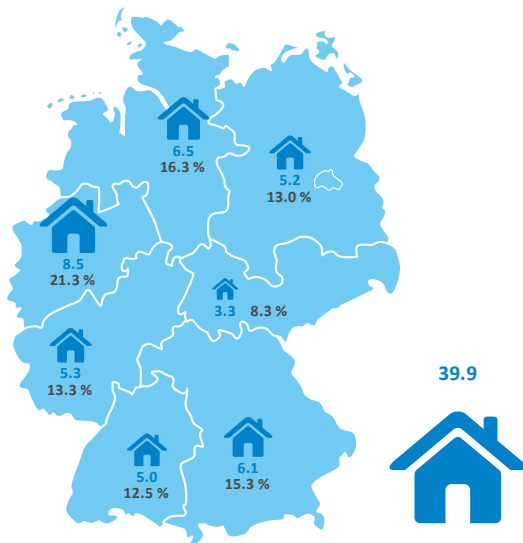


Sales Revenue (in m. Euro)



Residents and Households

No. of Residents*

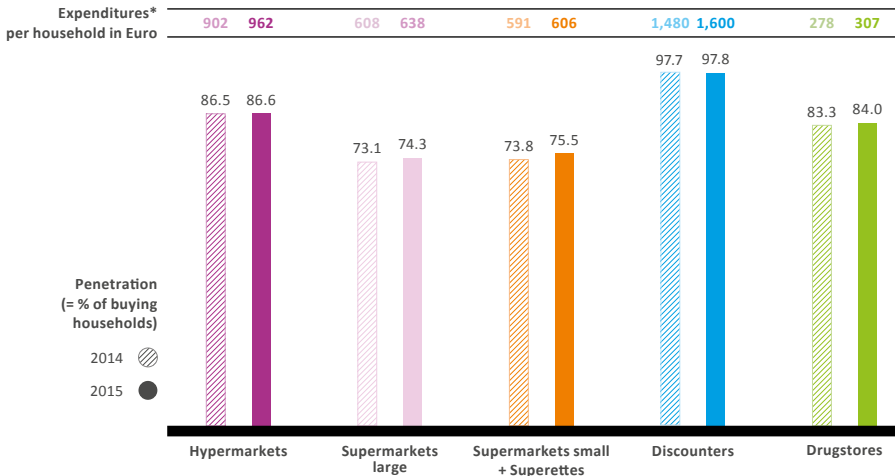


Source: Statistisches Bundesamt;

* 31st Dec. 2013; ** Results of sample census – Population in private households in principal and secondary residence (annual average 2011)

Consumer Base and Total Expenditures*

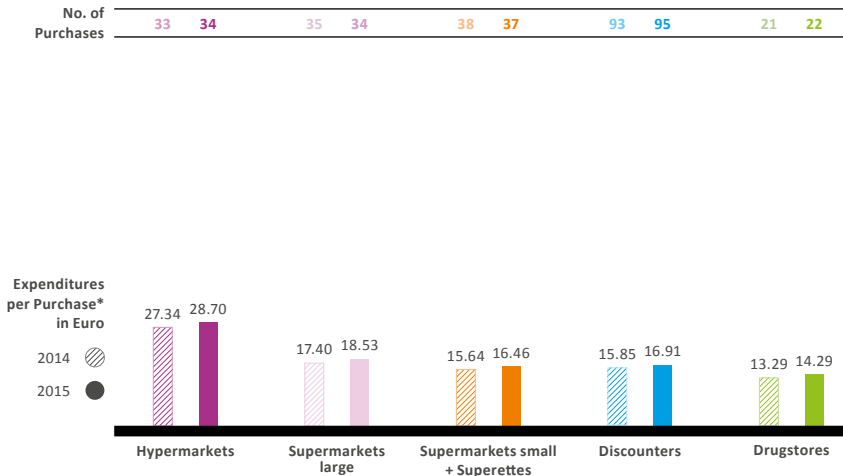
Discounters still have the highest acceptance amongst consumers and remain to note the highest total expenditures per household.



Source: Nielsen Homescan Consumer Panel; * Consumer Packaged Goods only

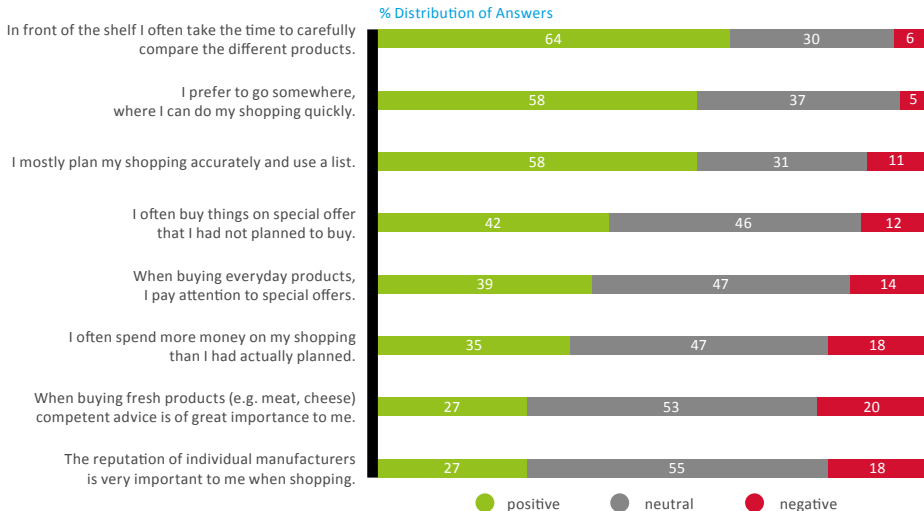
Expenditures per Purchase and Number of Purchases*

The high overall expenditures in the discount sector result primarily from an extremely high purchase frequency with an average of 1.8 purchases per household per week.



Source: Nielsen Homescan Consumer Panel; * Consumer Packaged Goods only

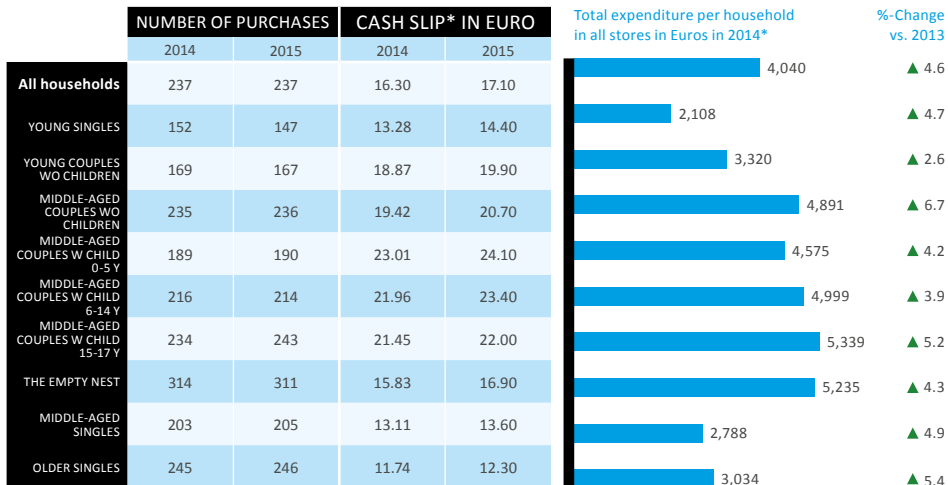
Buying Behaviour – What generally matters when making a purchase?



Source: Nielsen Homescan Consumer Panel, Attitude Questioning

Number of Purchases and Cash Slip

While the number of purchases was stable in 2015, the costs per household increased.



Source: Nielsen Homescan Consumer Panel * Consumer Packaged Goods only

Internet Usage – 2nd half-year 2015 – Mass Merchandiser Top10 Companies*

Website	Unique Audience in 1,000					
	JUL 15	AUG 15	SEP 15	OCT 15	NOV 15	DEC 15
Mass Merchandiser**	32,803	32,038	31,540	33,830	34,866	35,691
Amazon	27,521	26,410	25,737	28,005	29,752	30,326
OTTO	5,464	4,879	4,747	5,489	5,654	6,135
Lidl	4,471	4,028	4,162	4,622	4,583	5,023
Tchibo	4,445	3,985	3,984	4,182	3,928	4,340
ALDI	2,610	2,626	2,153	2,403	2,120	2,836
real,-	2,017	1,768	1,771	2,008	2,218	2,458
Kaufland	1,192	1,177	1,121	1,369	1,202	2,235
Weltbild	1,339	1,251	1,395	1,343	1,617	1,989
Rossmann	1,905	1,774	1,578	1,544	1,928	1,871
BAUR Versand	1,691	1,544	1,331	1,515	1,816	1,567

*Top10 Ranking: This ranking is based on the month of December 2015 (the respective ranking in previous months may vary)

**Mass Merchandiser (Online Store): Sites that are virtual department stores and may fall under multiple categories

Source: Nielsen Digital Content Measurement

Time Spent on the Internet – 2nd half-year 2015 – Mass Merchandiser Top10 Companies*

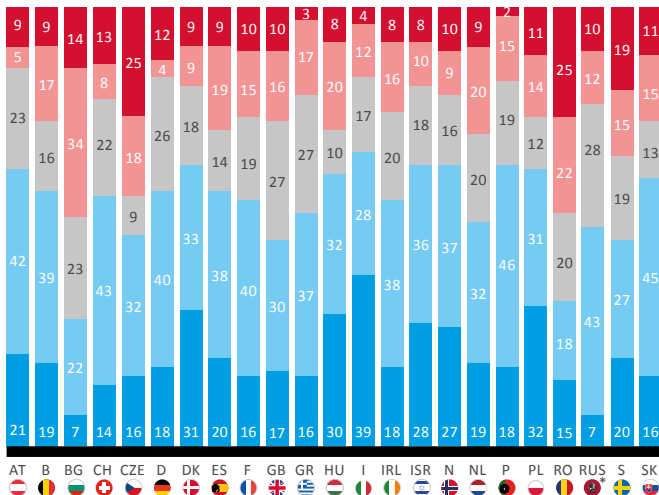
Website	Time per Person (hh:mm:ss)					
	JUL 15	AUG 15	SEP 15	OCT 15	NOV 15	DEC 15
Mass Merchandiser**	01:11:31	01:02:28	01:01:33	01:05:17	01:15:52	01:23:32
Amazon	00:55:48	00:47:29	00:46:44	00:51:06	00:59:13	01:08:04
OTTO	00:18:56	00:18:14	00:18:09	00:19:03	00:18:28	00:22:07
BAUR Versand	00:18:13	00:12:51	00:12:41	00:12:37	00:14:31	00:17:36
Weltbild	00:14:52	00:10:15	00:08:35	00:11:37	00:14:23	00:12:59
Kaufland	00:09:16	00:10:01	00:10:35	00:08:13	00:10:41	00:12:57
Tchibo	00:17:40	00:16:01	00:13:34	00:14:34	00:18:13	00:12:30
Lidl	00:10:04	00:11:15	00:11:50	00:12:42	00:11:36	00:11:35
Rossmann	00:10:07	00:09:08	00:09:48	00:10:41	00:10:34	00:10:35
real,-	00:11:13	00:09:31	00:10:48	00:09:35	00:11:39	00:10:18
ALDI	00:07:24	00:07:55	00:08:26	00:06:53	00:06:28	00:08:08

* Top10 Ranking: This ranking is based on the month of December 2015 (the respective ranking in previous months may vary).

** Mass Merchandiser (Online Store): Sites that are virtual department stores and may fall under multiple categories

Source: Nielsen Digital Content Measurement

Impact of Promotional Offers



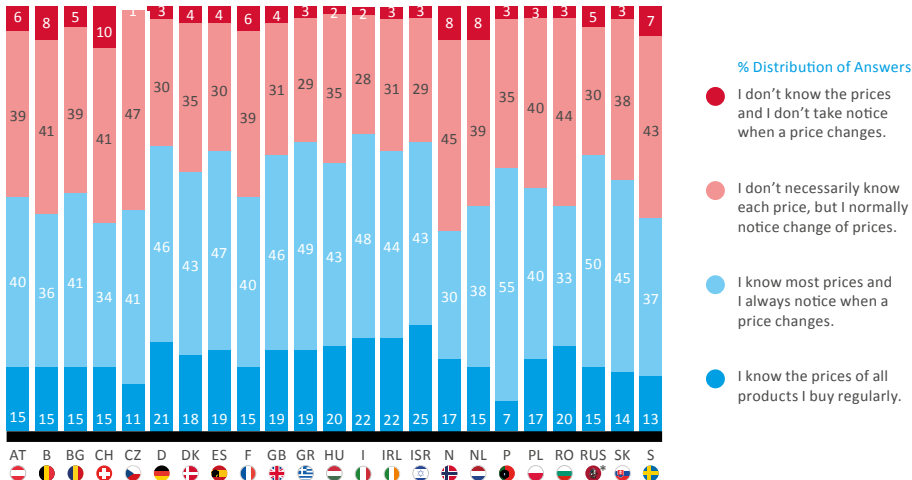
% Distribution of Answers

- Promotions rarely change my brand choices.
- I only buy promotions when I already know the brand.
- I regularly buy different brands because of promotions.
- I very seldom change stores, but when shopping, I actively seek out promotions.
- I change stores each shopping trip depending on which offers the most attractive promotions.

* Moscow only; Source: Nielsen Shopper Trends 2015/2016

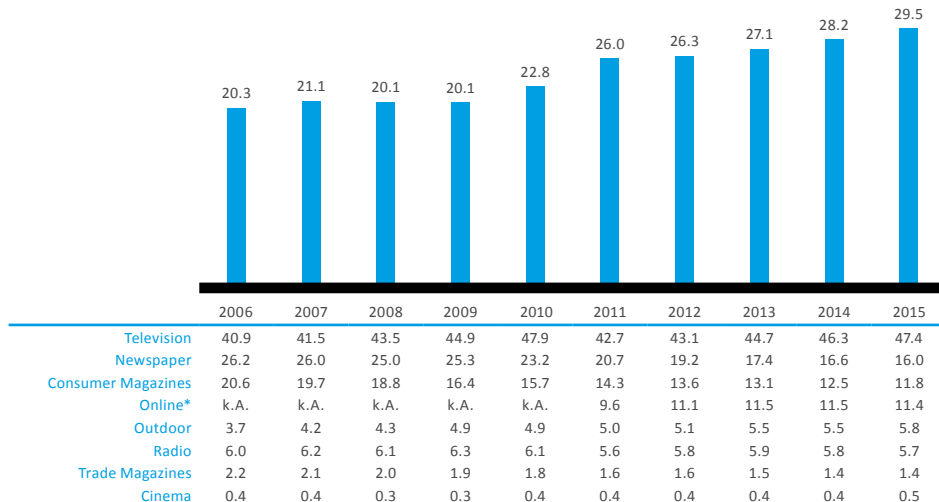
Price Consciousness

Which of the following statements describes best your knowledge regarding prices of products you buy regularly?



* Moscow only; Source: Nielsen Shopper Trends 2015/2016

Advertising Expenditure in Germany in bn. Euro and Media Split* in %



* Due to a changed evaluation type for the Internet in 2011, comparisons with the period 2006 – 2010 are not feasible.

Source: Nielsen, Advertising Statistics

Advertising Expenditure 2015 – By Industry and Media (in %) – Part 1

Industry	TOTAL IN M. EURO	TRADE MAGAZINES	TELEVISION	CINEMA	ONLINE	OUT-DOOR	CONSUMER MAGAZINES	RADIO	NEWSPAPER
Media	4,394	2.7	22.7	0.5	3.8	3.2	20.6	4.2	42.4
Trade & Mail-Order	3,899	0.5	51.3	0.2	11.7	3.5	5.1	7.7	20.1
Service Industry	2,502	1.4	51.1	0.8	12.6	9.9	5.9	5.3	13.0
Automobile	2,229	1.3	32.7	0.7	17.6	4.2	11.0	13.2	19.3
Food	2,110	1.3	80.8	0.6	6.3	3.4	4.0	1.9	1.7
Body Care	2,044	0.3	77.9	0.1	6.1	0.6	14.1	0.2	0.7
Telecommunications	1,620	0.2	66.8	0.7	12.3	8.0	4.5	2.9	4.6
Other Advertising	1,494	0.5	15.0	0.6	46.0	10.8	14.4	4.1	8.6
Health & Pharmacy	1,300	1.6	56.0	0.0	3.7	2.2	29.7	2.5	4.3
Finance	1,263	0.7	48.5	0.9	21.3	5.1	7.7	3.7	12.1
Beverages	1,183	1.0	65.0	1.1	7.4	14.3	4.2	4.8	2.3
Home & Garden	919	1.4	26.1	0.3	6.1	4.8	10.2	18.8	32.3
Clothing & Textiles	698	2.5	27.5	0.6	9.1	13.3	32.1	5.2	9.7
Tourism & Catering	654	1.4	15.9	0.7	14.1	13.4	24.4	10.1	19.9

Source: Nielsen, Advertising Statistics

Advertising Expenditure 2015 – By Industry and Media (in %) – Part 2

Industry	TOTAL IN M. EURO	TRADE MAGAZINES	TELEVISION	CINEMA	ONLINE	OUT-DOOR	CONSUMER MAGAZINES	RADIO	NEWSPAPER
Cleaning	438	0.2	92.1	0.0	4.1	0.1	3.2	0.2	0.0
Personal Needs	402	1.0	57.0	0.2	5.7	2.5	23.7	2.7	7.1
Gastronomy	365	0.6	48.8	0.9	8.6	13.9	4.2	16.5	6.5
Building Sector	321	4.9	35.8	0.1	7.0	12.9	6.0	14.0	19.3
Consumer Electronics	275	0.1	67.3	2.1	13.2	2.6	11.0	2.3	1.5
Energy	259	1.8	32.5	0.1	18.5	14.1	7.9	8.7	16.3
Computing & Office	190	5.7	29.6	1.1	28.4	10.3	16.7	2.6	5.5
Domestic Economy, Agriculture, Forestry & Hunting	185	10.5	55.7	0.0	3.8	3.0	12.5	7.5	6.9
Arts & Culture	150	0.1	46.5	0.3	2.9	15.6	5.9	11.2	17.5
Leisure & Sport	148	0.0	47.3	0.3	2.6	4.4	10.5	6.3	28.6
Transport	137	2.3	12.4	0.9	18.0	24.1	14.4	10.9	17.0
Investment Goods	46	34.2	26.2	0.0	3.8	1.5	16.8	4.4	13.0
Industrial Consumer Goods	17	12.6	38.9	0.0	3.4	1.1	32.2	0.5	11.2

Source: Nielsen, Advertising Statistics

Advertising Expenditure 2015 – By Business and Media (in %) – Part 1

Business	TOTAL IN M. EURO	TRADE MAGAZINES	TELEVISION	CINEMA	ONLINE	OUT-DOOR	CONSUMER MAGAZINES	RADIO	NEWSPAPER
Cars	1,722	0.5	36.7	0.8	17.2	4.1	10.8	9.2	20.8
E-Commerce	1,711	0.2	70.9	0.2	17.2	2.5	3.7	2.6	2.7
Ads	1,409	0.1	0.9	0.1	0.3	0.4	1.8	1.5	94.8
Online Services	1,314	0.5	74.8	0.4	9.2	3.9	1.7	0.9	8.6
Medicines	1,056	1.8	57.4	0.0	3.6	1.2	31.8	2.1	2.0
Grocery Trade	1,038	0.1	24.9	0.1	5.2	2.5	2.7	11.1	53.5
Cellular Network	994	0.1	72.6	0.7	8.7	7.7	3.4	2.2	4.5
Consumer Magazines Advertising	886	0.9	16.5	0.2	1.5	0.8	65.8	2.1	12.2
Company Advertising	863	0.6	9.7	0.2	76.1	3.6	5.5	0.8	3.7
Confectionary	745	0.4	86.6	0.9	6.8	3.8	1.3	0.2	0.1
Furniture	711	0.3	21.3	0.4	3.6	5.3	6.0	23.4	39.9
Other Media/Publishers	697	6.2	21.5	0.1	4.7	2.1	17.1	5.3	42.9
Department Stores	523	0.0	41.5	0.4	9.8	6.2	0.7	15.5	25.9
TV Advertising	486	0.1	62.0	0.5	12.4	7.3	12.4	0.7	4.6
Hair Care	477	0.3	85.0	0.0	2.8	0.3	11.0	0.1	0.5

Source: Nielsen, Advertising Statistics

Advertising Expenditure 2015 – By Business and Media (in %) – Part 2

Business	TOTAL IN M. EURO	TRADE MAGAZINES	TELEVISION	CINEMA	ONLINE	OUT-DOOR	CONSUMER MAGAZINES	RADIO	NEWSPAPER
FDL Private Clients	420	0.2	65.4	0.5	13.3	2.4	7.1	2.3	8.7
Non-Alcoholic Beverages	405	0.9	61.9	1.0	9.8	17.6	2.9	4.8	1.2
Beer	367	0.6	57.2	1.0	5.4	19.8	3.8	8.1	4.1
Hotels and Restaurants	365	0.6	48.8	0.9	8.6	13.9	4.2	16.5	6.5
Insurances	360	1.2	48.1	1.0	24.9	8.8	6.0	6.1	3.9
Clothes	356	2.8	25.3	0.5	8.4	17.4	30.1	7.0	8.5
Classified Advertising	332	0.1	9.4	1.4	5.4	24.6	41.9	13.6	3.6
Face Care	324	0.2	73.4	0.0	3.0	0.1	23.1	0.1	0.2
Mail-order Trade	305	5.2	55.4	0.1	7.9	0.6	27.7	1.5	1.7
Perfumery	301	0.2	71.7	0.1	6.0	0.4	20.5	0.4	0.8
Charity	299	0.8	36.3	1.1	4.1	16.4	9.8	3.2	28.3
Movie	264	0.0	65.5	3.7	12.6	7.9	4.7	4.2	1.5
Corporations	263	2.2	16.1	2.9	11.4	21.9	11.4	4.3	29.7
Construction Materials	250	4.3	43.0	0.0	7.9	11.9	3.6	13.1	16.1

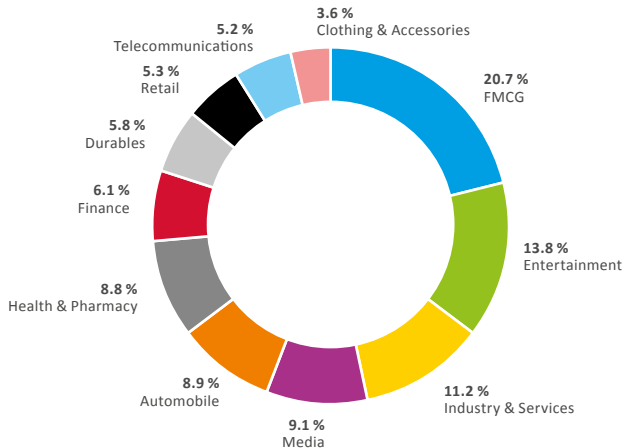
Source: Nielsen, Advertising Statistics

Advertising Expenditure 2015 – Top 10 Retail types by family

Family	M. EURO 2015	M. EURO 2014	+/- %
Total	3,899.0	3,677.6	6.0
Discounters	586.0	688.9	-14.9
Electronics market	455.4	438.8	3.8
Supermarket	452.2	504.2	-10.3
E-Commerce Tourism/Ticketing	301.4	250.4	20.4
E-Commerce Media	238.9	224.2	6.6
E-Commerce Fashion/Camping/Sports	208.3	144.6	44.0
E-Commerce Range	204.1	191.1	6.8
E-commerce others	160.9	140.3	14.7
Retail companies/Image	148.8	19.2	675.5
Mail-order others	98.6	103.3	-4.6

Source: Nielsen, Advertising Statistics

Advertising worldwide – Share of industries



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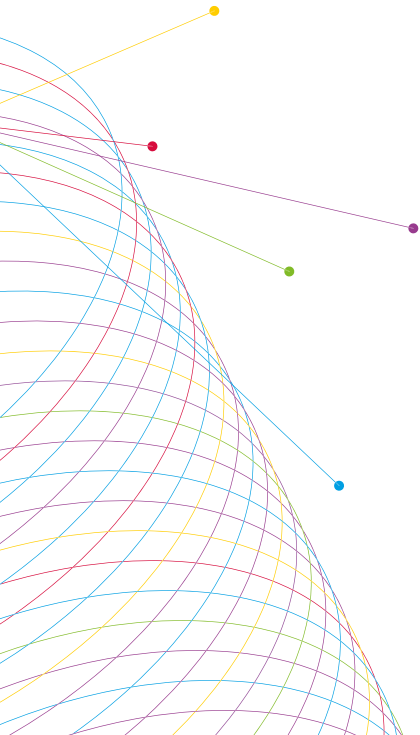
- **Home cleaning**

Read more about cleaning behaviour in German households – who does the cleaning, which products are used and which rooms are particularly important. Home Care:
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