

## **YouGov Shopper Panel Basics (2/3)**

How category management works  
and what benefits consumer panel  
data can bring to Coca-Cola



YouGov Shopper intelligence for Coca-Cola  
27/06/2024



# A series of exclusive trainings on Shopper Panel for Coca-Cola



## YouGov Shopper Basics (1/3): How **consumer panels** work and what you can do with this data

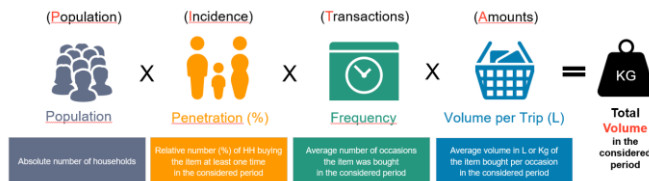
- When: **20.06.2024; 15.00 CET**
- During this webinar you will find out what consumer (=shopper) panel is, how it functions, what basic analyses are available and how to access them. This session suits beginners or irregular users of consumer panel data.

17 YouGov Shopper panel basics (1/3) Methodology and KPIs YouGov

### Basic KPIs

Starting Point of sales data analysis from the shopper angle

Key factors contributing to **Volume change** measured by a Household panel  
Household **PITA**



## YouGov Shopper Basics (2/3): How **category management** works and what benefits consumer panel data can bring to COCA-COLA

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25 YouGov Shopper panel basics (2/3) How to use Shopper data in Category Management? YouGov

### Successful retailer-supplier collaboration aims to identify and leverage growth opportunities for retailers, categories, and brands



## YouGov Shopper Basics (3/3): Which **advanced analytics** can help COCA-COLA answer their key questions?

- When: **11.07.2024; 15.00 CET**
- During this session YouGov Shopper experts will demonstrate the overall scope of advanced analytics available in consumer panels and show you a couple of cases of analyses most relevant for Coca-Cola business.

14 YouGov Shopper panel basics (3/3) Overview Advanced Solutions YouGov

### We focus on the core areas of FMCG: Marketing, CatMan and Sales



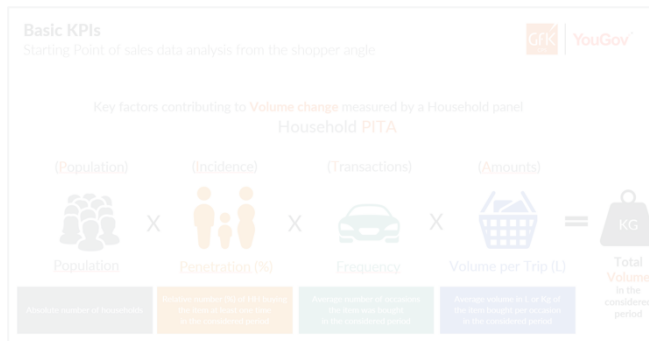


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# YouGov Shopper intelligence presenter today



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- **Experience**

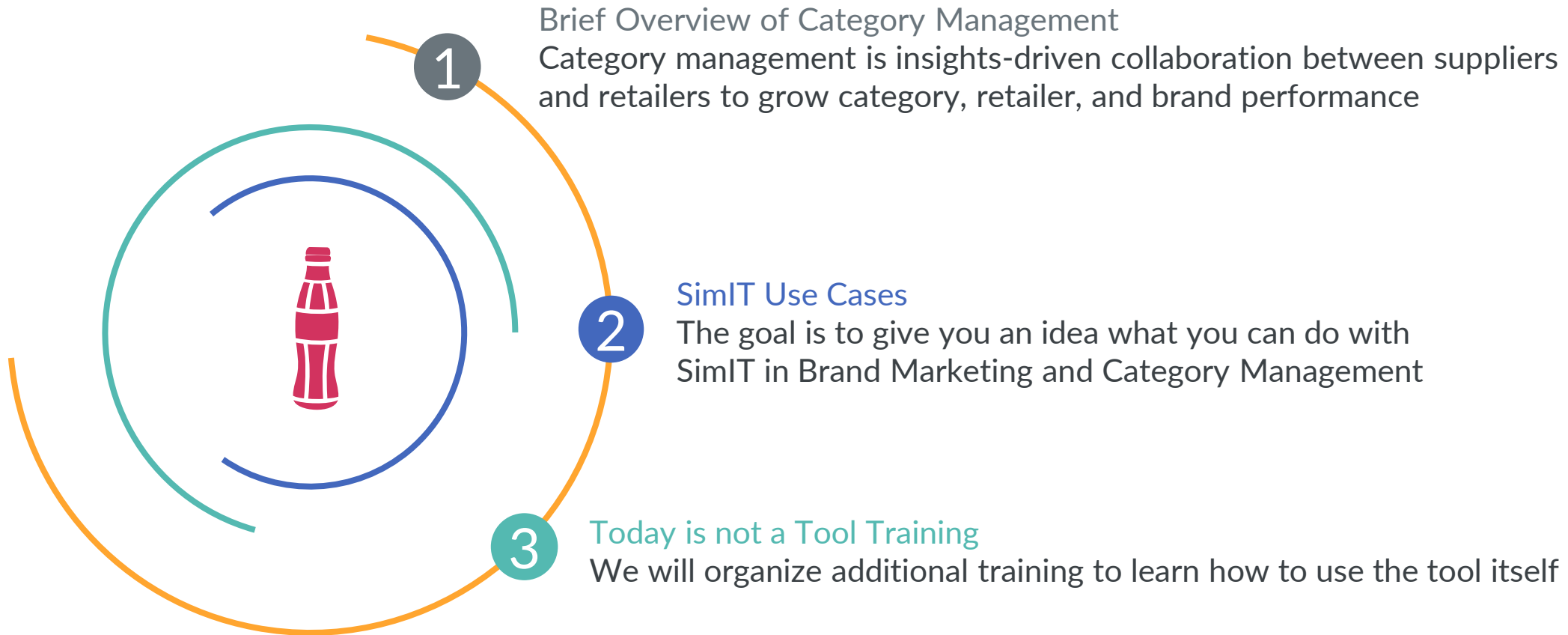
- 1996-2015: Supplier side, Category management, Trade and Shopper Marketing, Sales, at companies like Sara Lee|DE, FrieslandCampina, Unilever, Perrigo
- Since 2016: YouGov: NL Advanced Business Solutions Lead, Global Product, Global Shopper Lead

# Agenda

1. The shopper in category management
2. How can we use shopper data from SimIT in brand marketing?
3. How can we use shopper data from SimIT in category management?



# Objective for today



# 1 **Brief overview of category management**

# Category management is insights-driven collaboration between suppliers and retailers to grow category, retailer and brand performance

## What is Category Management?

- A **strategic process** that helps suppliers and retailers **work together**
- **Grow sales and profitability** of products within specific categories
- **Creating value** for the category and the **shopper**

## Components of Category Management

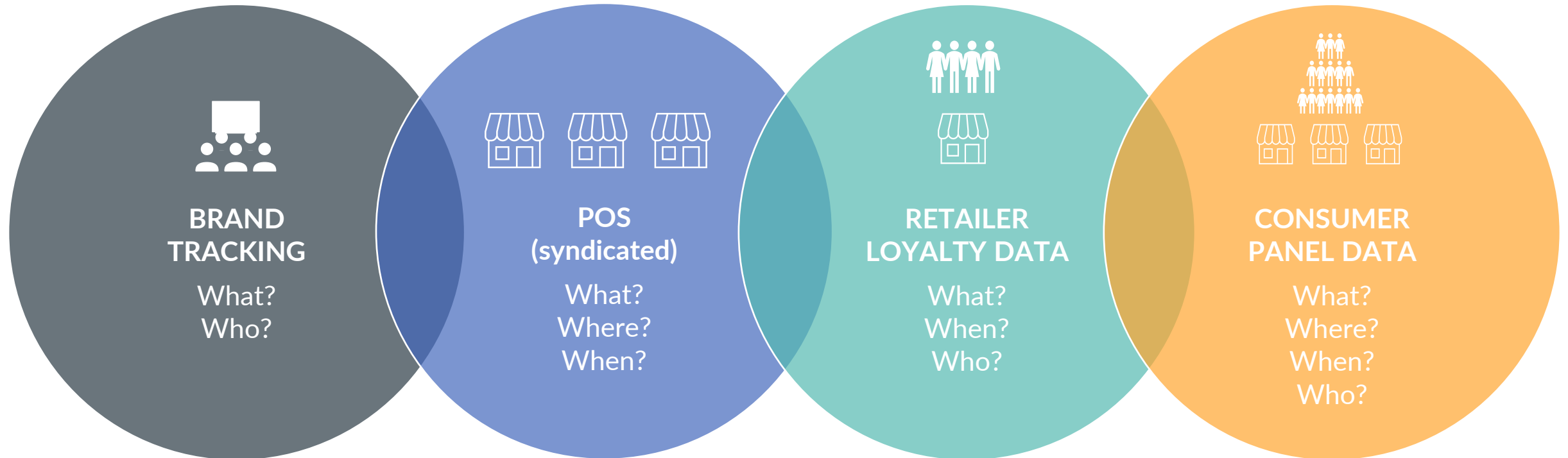
- **Collaboration**
- A **shared understanding** of the category, its shoppers, and how best to serve them
- **Improved decision-making** on product assortment, promotions, planograms, and pricing strategies based on data and insights

## What is key for collaboration?

- **Alignment of objectives**
- **Commitment** to the process
- Set aside conflicting interests
- For both parties



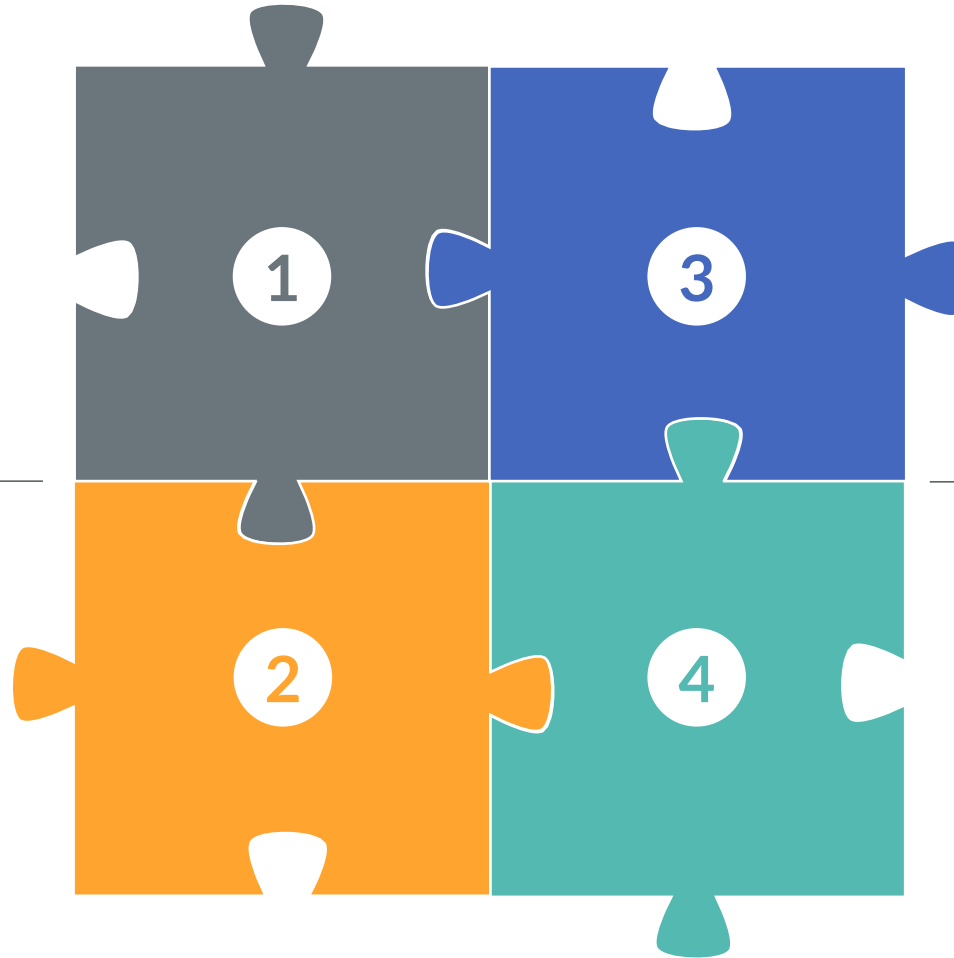
## We gain insights using different data sources, a.o. Consumer Panel data (incl. SimIT)



# Shopper data are essential in Brand and Category management

Shopper insights offer objective data on behavior, preferences, and purchasing patterns, across brand, retailers and channels

Objective insights strengthen collaboration and negotiation



Shopper insights serve as a common language between retailers and suppliers

Shopper insights shape customer-focused strategies

# **2 How to use Shopper data in Brand Marketing?**

## Let's assume we are a brand manager for Coca-Cola Zero in Italy

35.4%

of all households have purchased Coca-Cola Zero at least once during the last year. 64% purchased more than once

7.3

purchases were made by an average household

€3.29

was the average spend per trip



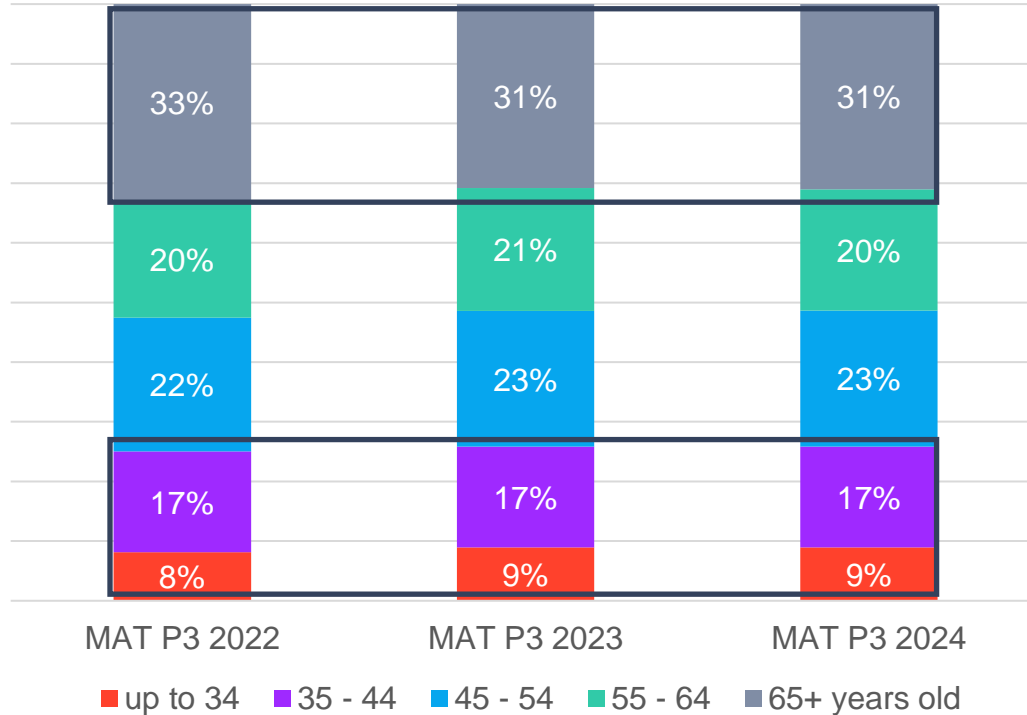
# The key questions we have as a Coca-Cola brand manager

- Can we expand Coca-Cola Zero In-Home in the coming year?
- What demographics should we focus on for maximum effect?
- Data we would need to answer these questions:
  - Brand tracking data by demographics
  - Shopper data to understand which demographics show the most potential for this proposition
- For this example, we will focus on shopper data

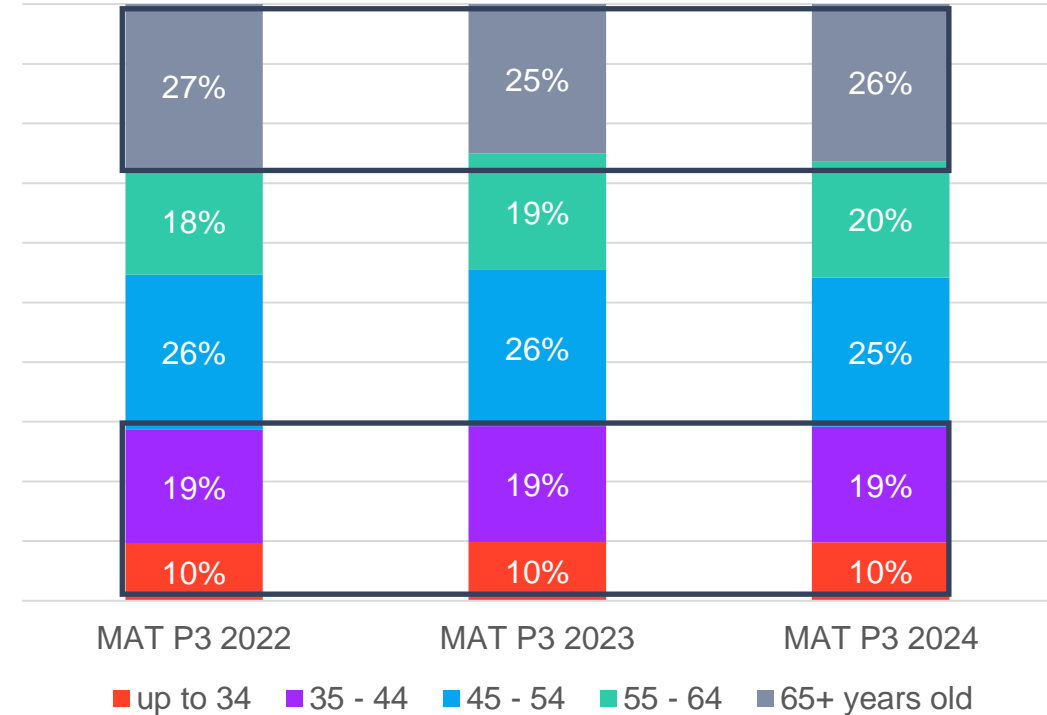


# The Italian Coke Zero Buyer is slightly younger than the average FMCG shopper in Italy (In-Home)

## Buyer Shares FMCG

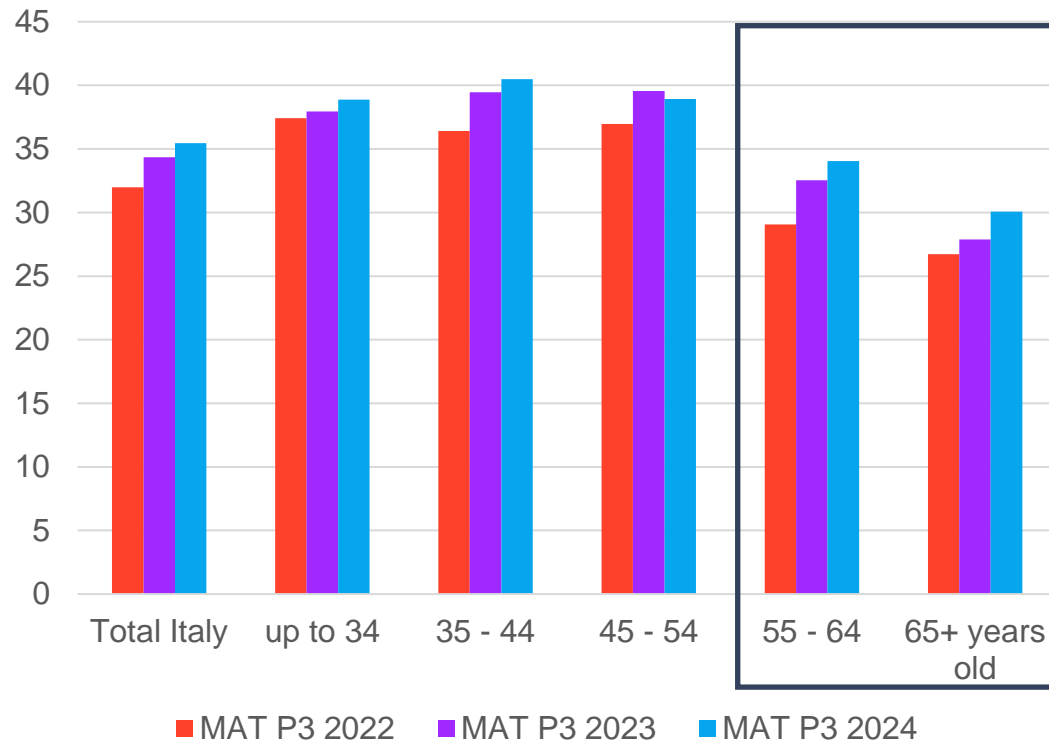


## Buyer Shares Coke Zero

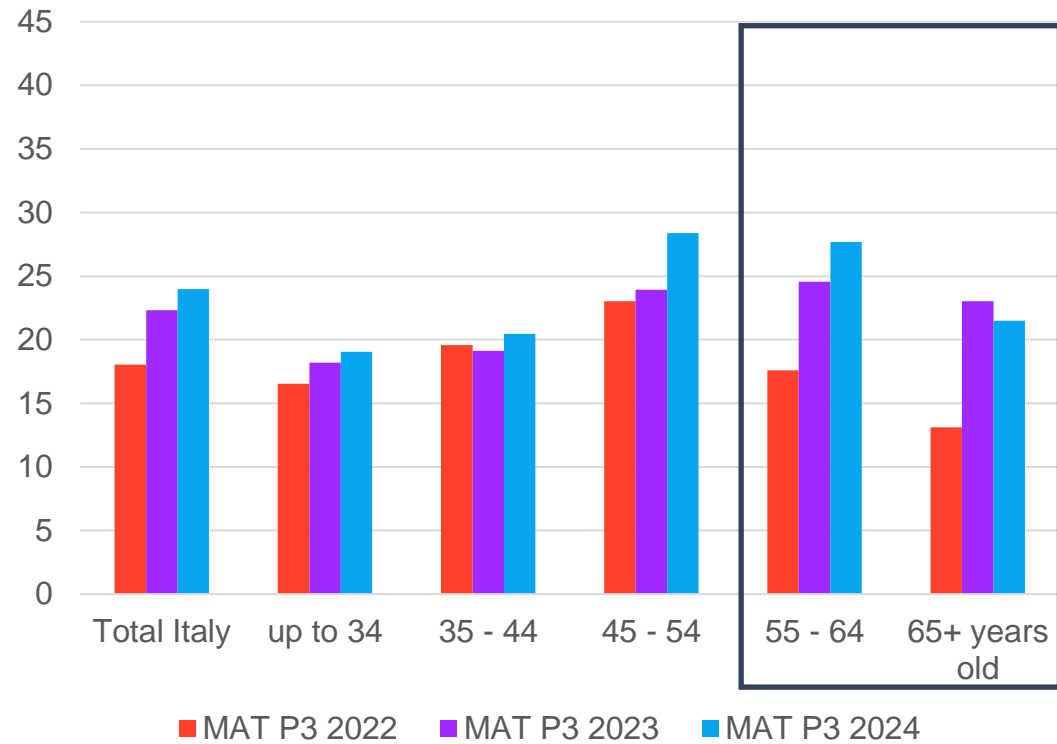


## Coke Zero penetration is lower among older age groups (though increasing), but those who do buy spend average

Coca-Cola Zero Penetration by Age Group

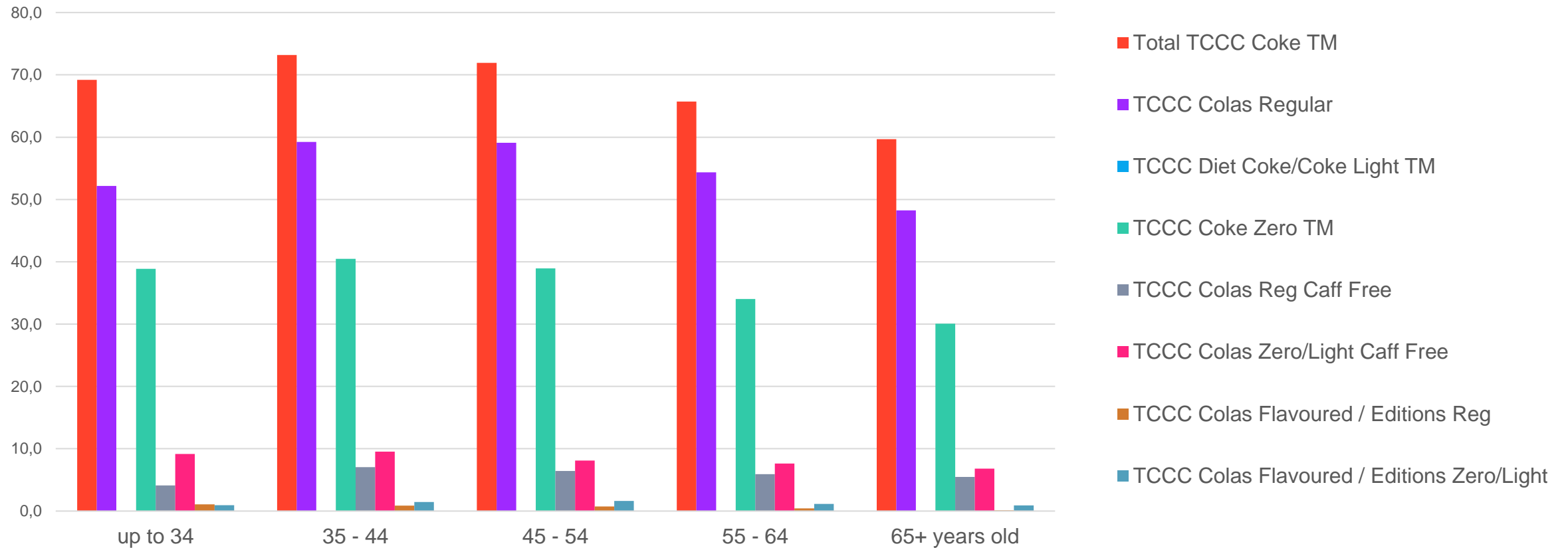


Spend per Buyer by Age Group in Euros



# The lower penetration in older households is visible for all TCCC Colas

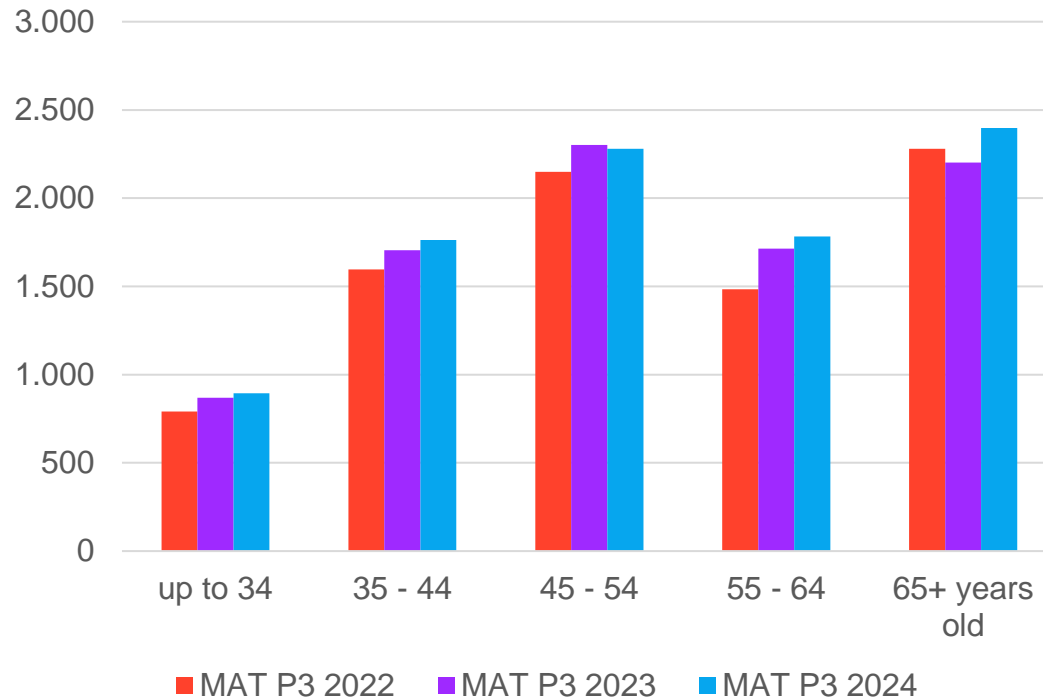
% of Households Buying  
(Penetration)



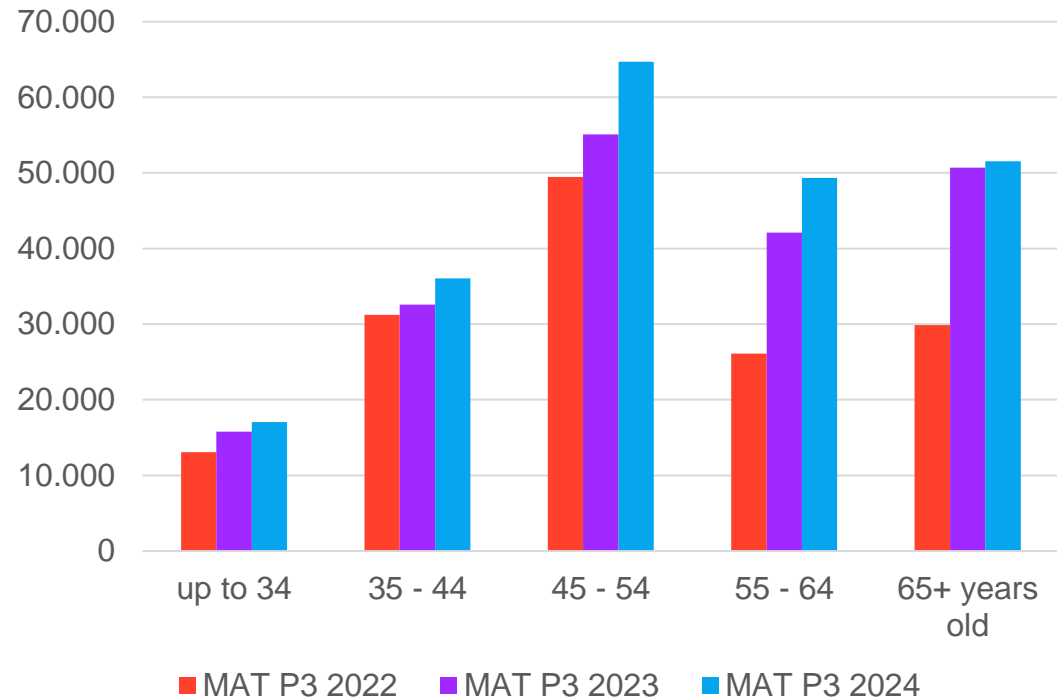


# 46% of Coke Zero buyers are 55+, and they contribute to 46% of the in-store value

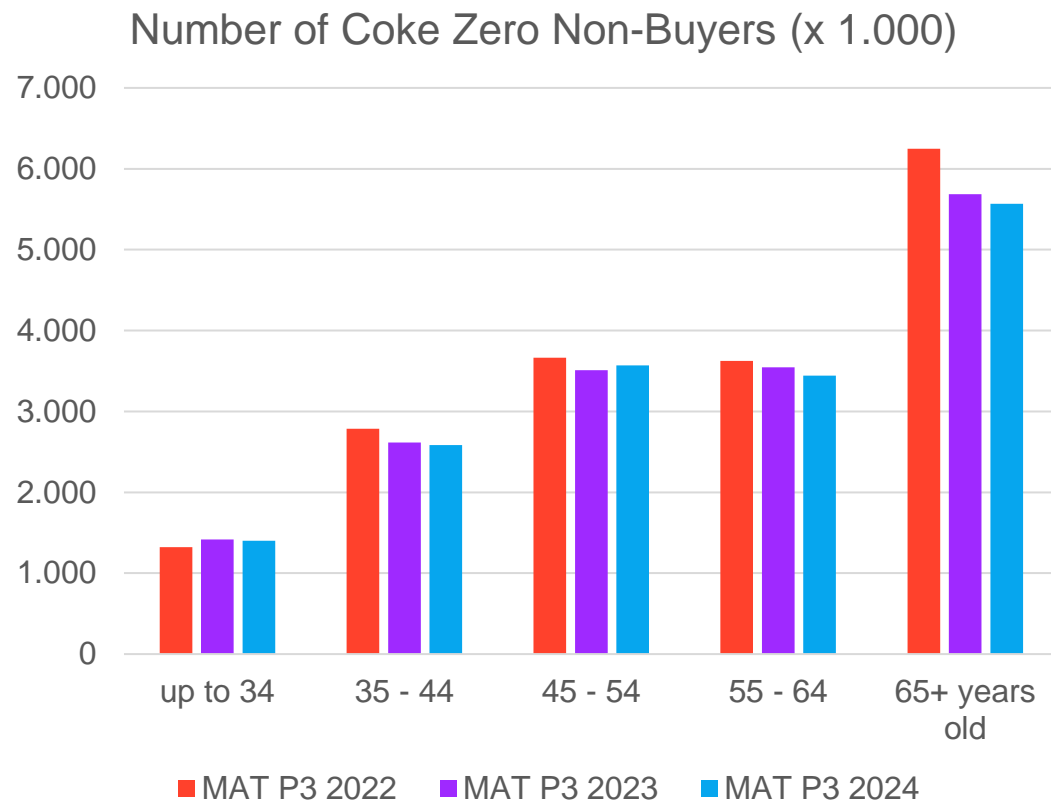
Number of Coca-Cola Zero Buyers by Age Group  
(x 1.000)



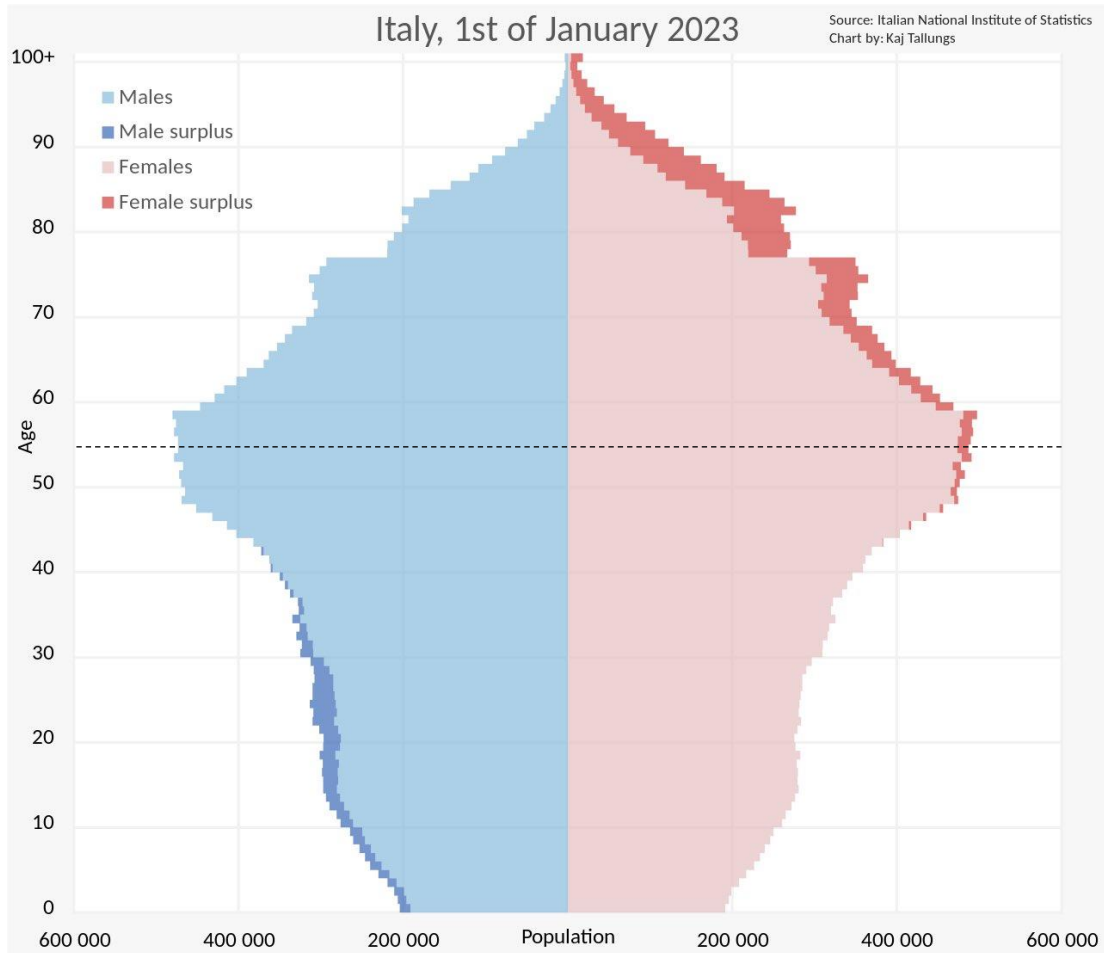
Value in Store by Age Group in Euros  
(x 1.000)



## Additionally, the largest number of non-buying households is found among the oldest age groups



# The reason for this older profile is the population structure in Italy, the majority of the Italian population is over 50



# Summarized, older shoppers are significantly important for sales growth

## Coke Zero buyers vs. FMCG buyers



- Coke Zero buyers are slightly younger than the average FMCG buyer

## Older shoppers show lower penetration



- Coke Zero penetration is lower among older age groups (though increasing), but those who do buy spend above average


## Older shoppers are significantly important for Coke Zero sales



- Despite this relatively low penetration within older age groups, they are a significant part of our buyer group and good for almost half of our sales value



**Increasing penetration within the oldest age groups could gain 250K additional buyers, €6M in-store value, and a 1.1% overall penetration increase**

	Penetration (MAT P3 2024)	Target Penetration	Additional buyers (x 1.000)	Avg Spend Per Buyer (MAT P3 2024)	Additional Value in Store (x 1.000)
Total Italy	35.4	36.5			
55 - 64	34.0	36	98.6	27.68	2,728
65+ years old	30.1	32	151.1	21.50	3,249
Total			249.7		5,977

# Top 10 retailers showing the greatest additional potential for older Coke Zero shoppers (Top 4 is similar)

These 4 retailers capture 32.1% of the Italian FMCG sales value

Age 55-64	
	Retailer
1.	LIDL
2.	EUROSPIN
3.	CONAD
4.	COOP
5.	MD
6.	ESSELUNGA
7.	FINIPER
8.	CONAD IPER
9.	PAM
10.	CARREFOUR MARKET

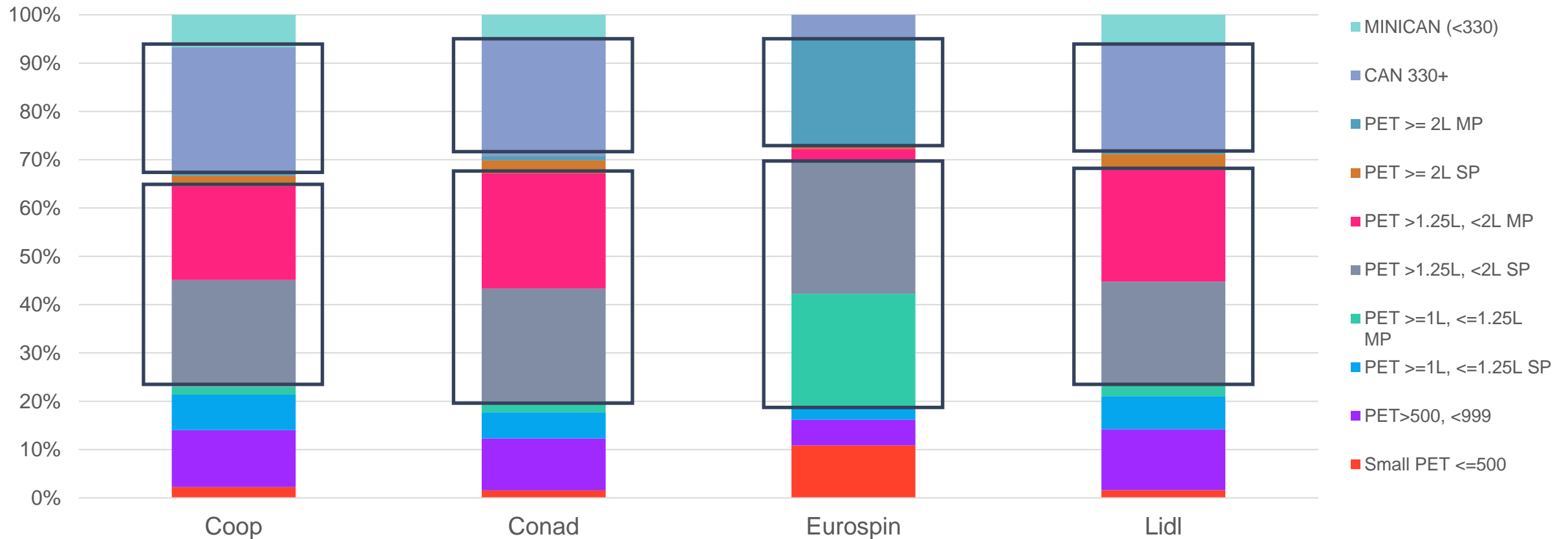


Age 65+	
	Retailer
1.	EUROSPIN
2.	CONAD
3.	LIDL
4.	COOP
5.	ESSELUNGA
6.	MD
7.	CONAD IPER
8.	DESPAR
9.	CARREFOUR MARKET
10.	PAM

# And what would be the best formats?

PET >1.25L <2 L MP and SP and Can 330 ml are the formats with the relatively highest potential. For Eurospin, other formats are also relevant

Missing Opportunity for the 55-64 and 65+ Age Groups by format



# Questions to ask as a brand manager to grow Coke Zero further

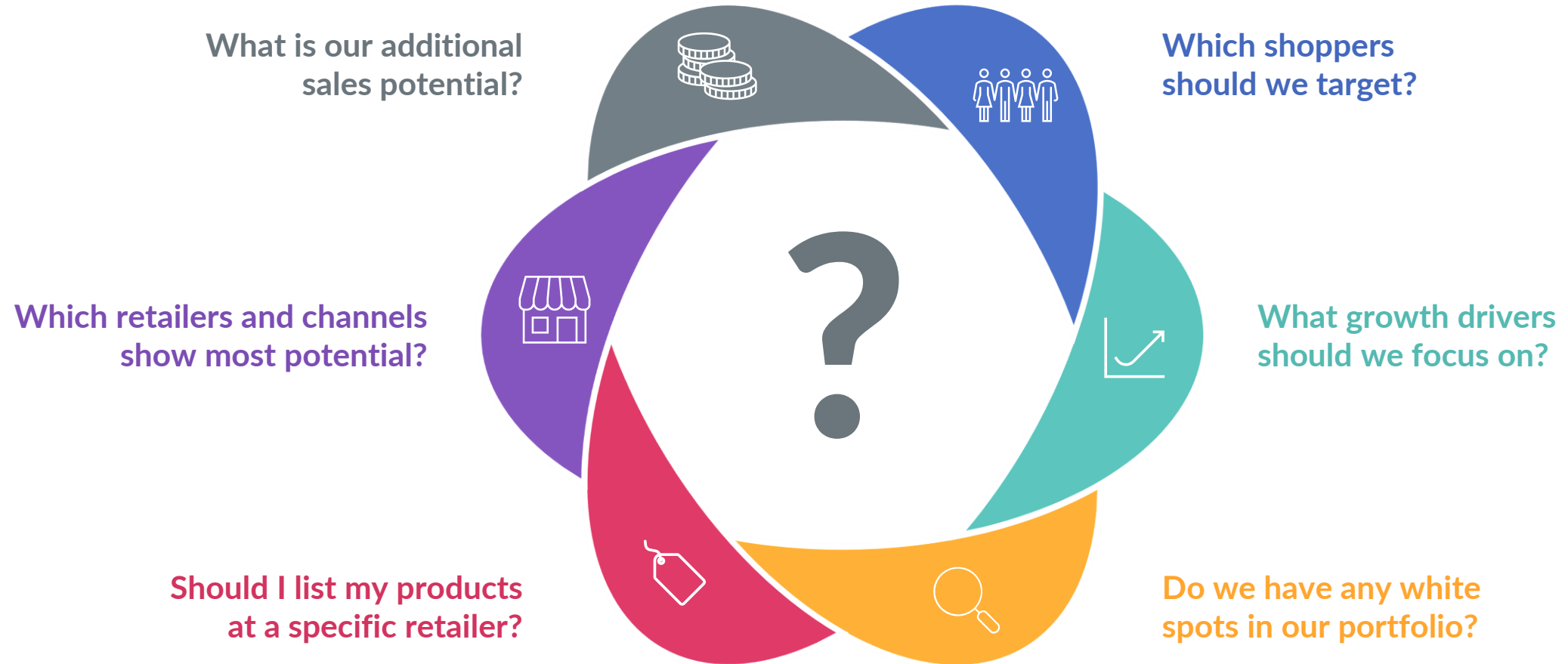
- What are reasons for these older age groups not to buy Coke Zero (and other colas)?
  - Is it related to the product type, soft drinks? Do older shoppers leave the category?
  - If they leave, what are the reasons behind it?
  - What would be needed to keep them in the category?
- What on-brand marketing communication appeals to these older consumer groups?
- How can Coke Zero be relevant to these consumers without alienating younger audiences?





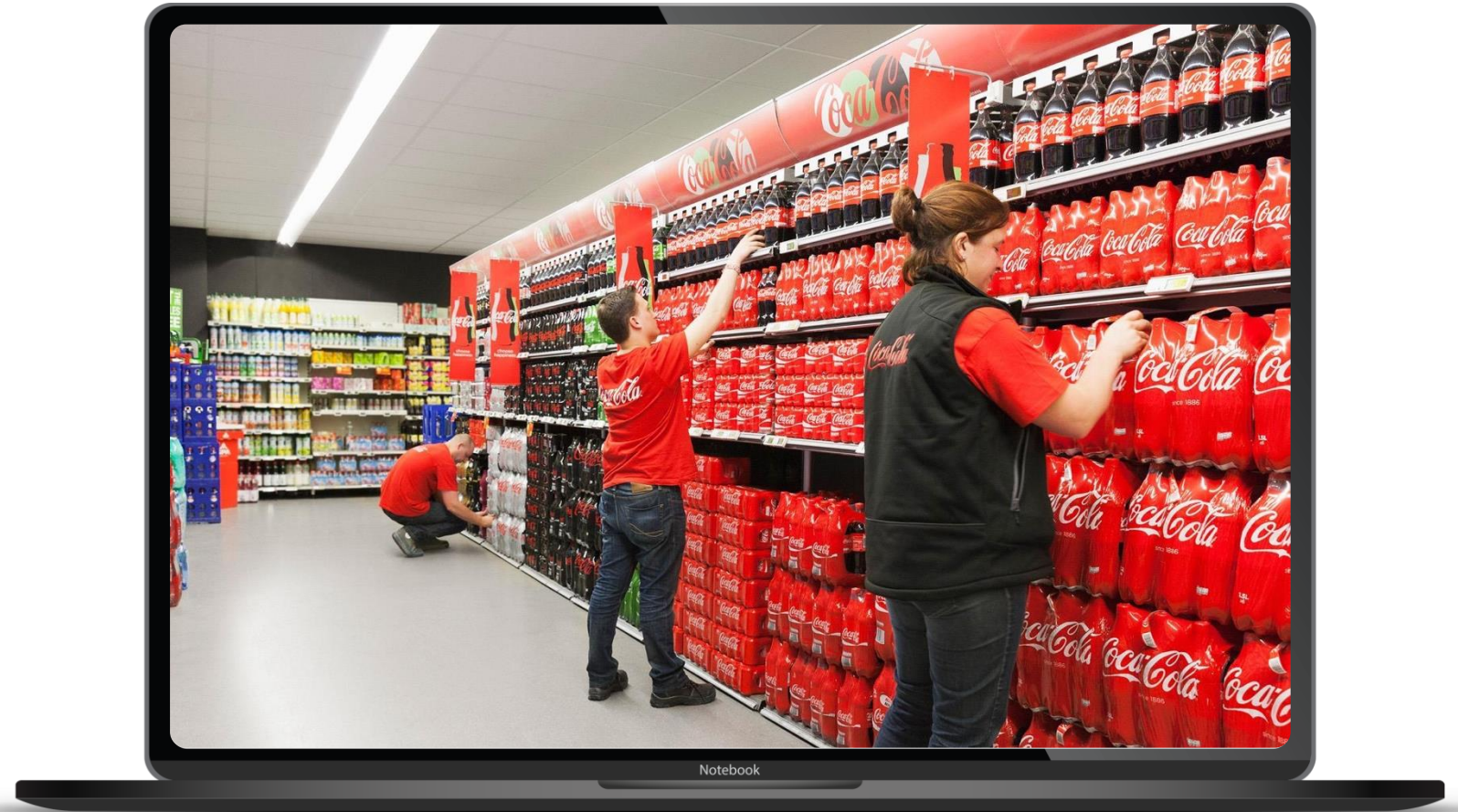
# **3 How to use Shopper data in Category Management?**

# Successful retailer-supplier collaboration aims to identify and leverage growth opportunities for retailers, categories, and brands

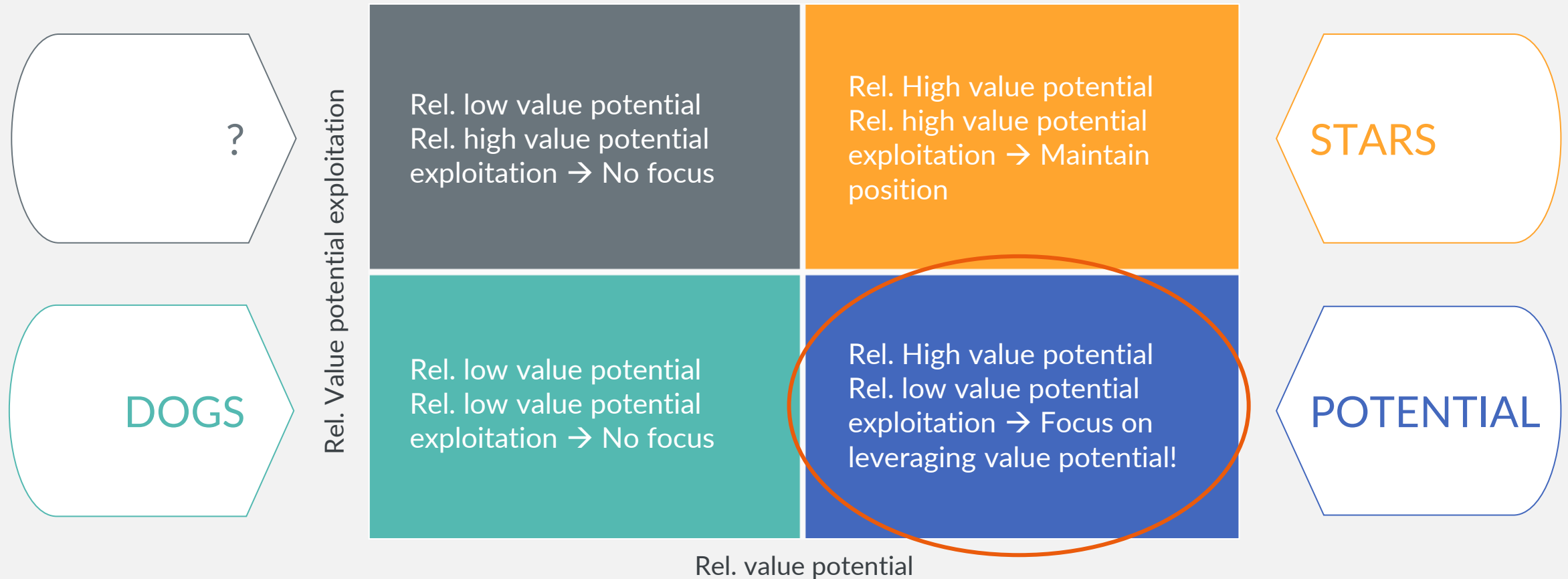


# How to use Shopper data in Category Management?

- It is about finding opportunities to drive category growth while adding value to category for the shopper.
- Which retailer should we target to grow Coca-Cola?

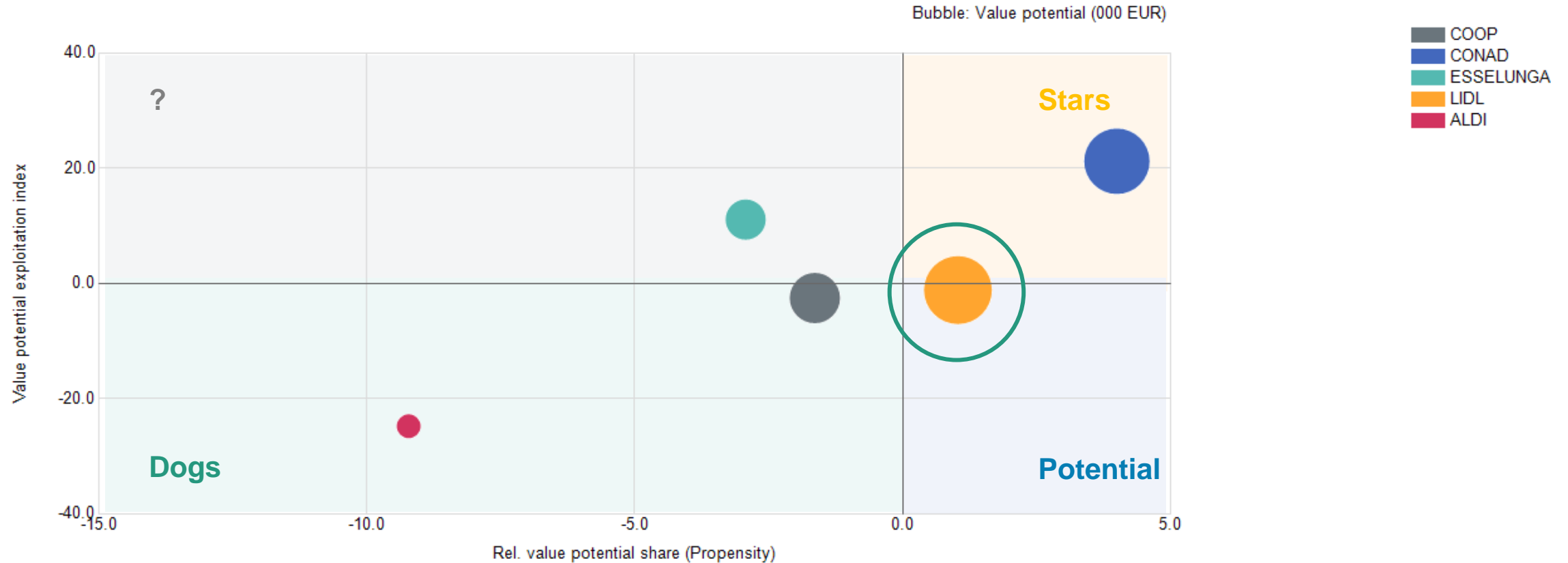


# How to prioritize retailers? The Potential Detection Matrix



# The largest unexploited potential for TCCC Colas lies with Lidl

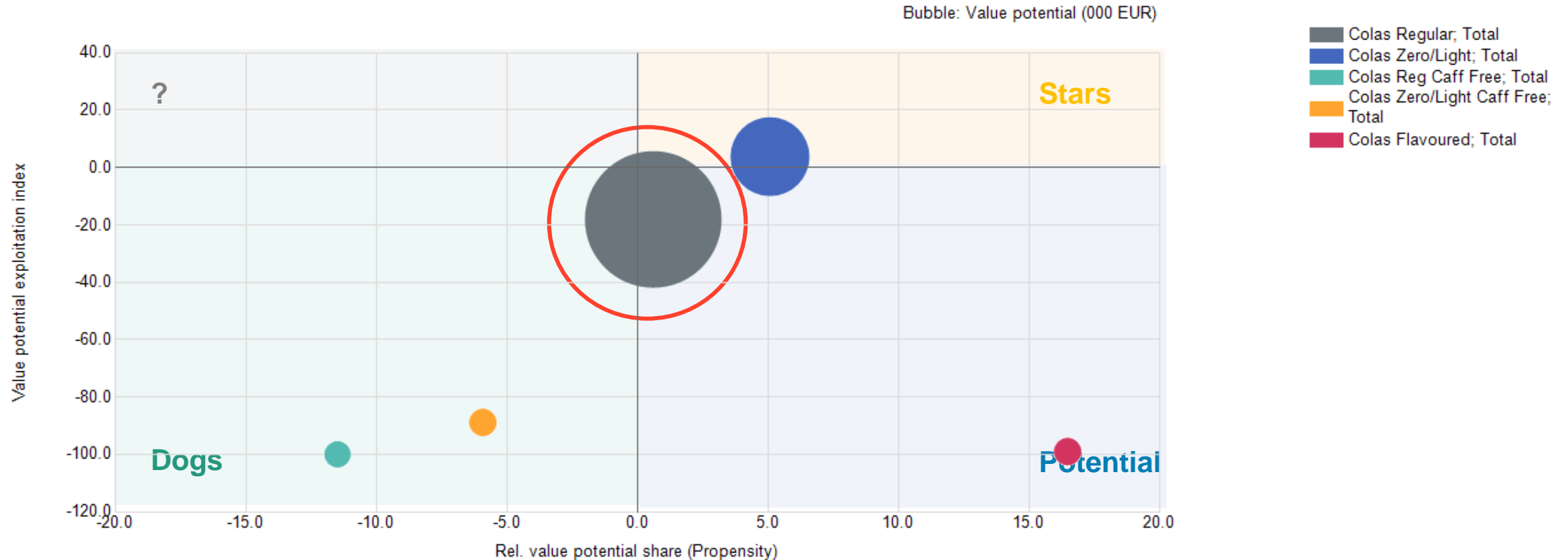
Performance Portfolio Analyzed Shop





# Coke Regular shows unexploited potential at Lidl

Performance Portfolio Analyzed Shop



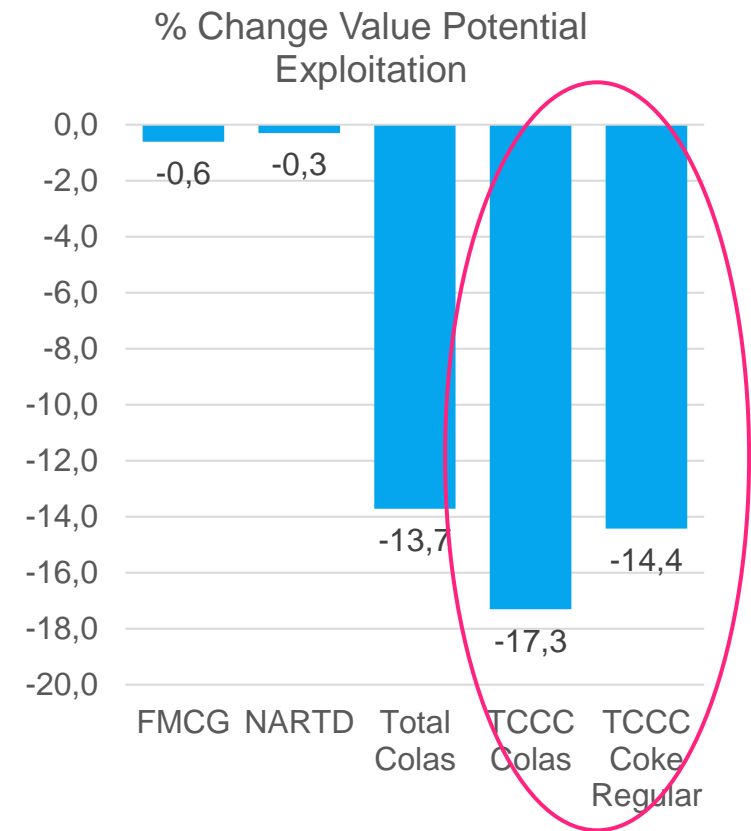
LIDL | MAT P3 2024 | Loyalty class: TOTAL | Total Italy | Total | Relative Base: Article [FMCG / Total]

# The key question is: What is Lidl's potential?

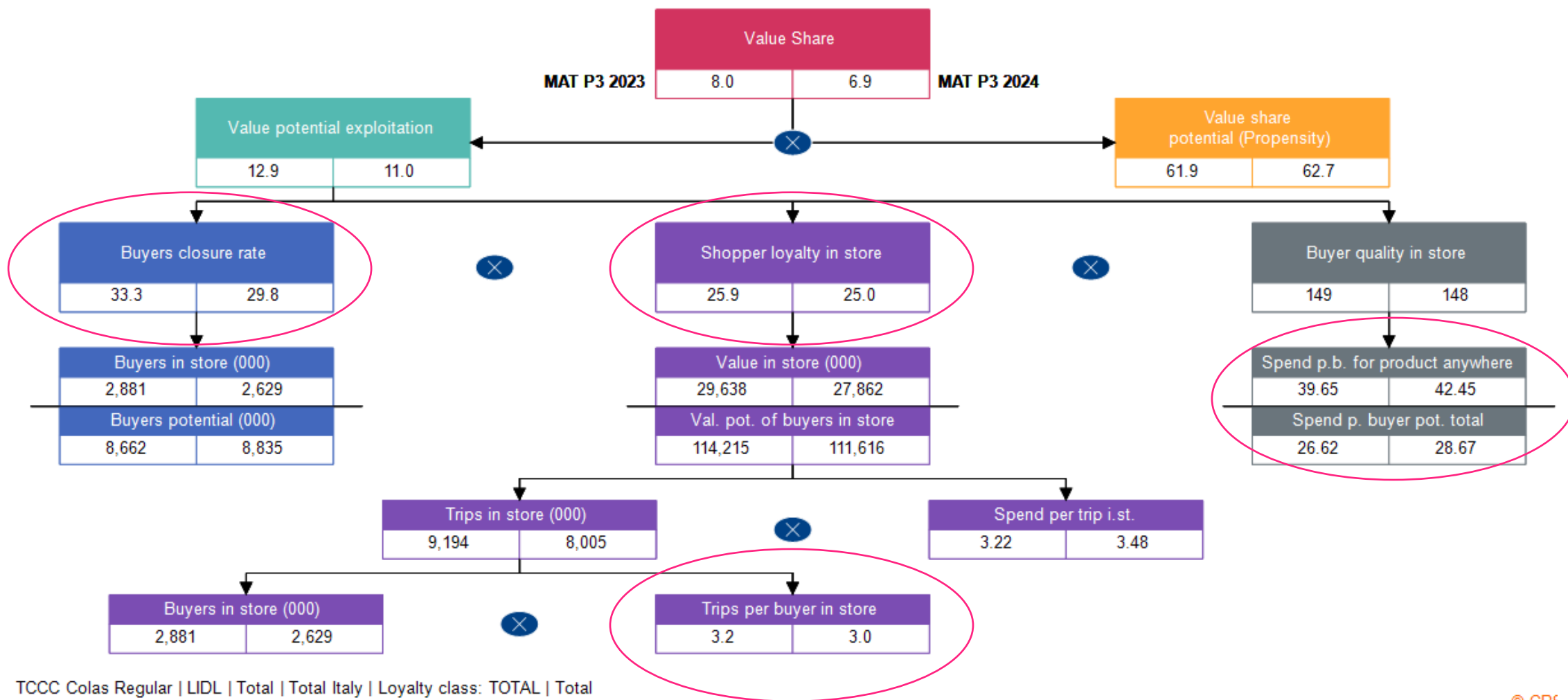
To calculate that, we take shoppers who buy Coke Regular and shop at Lidl as a starting point



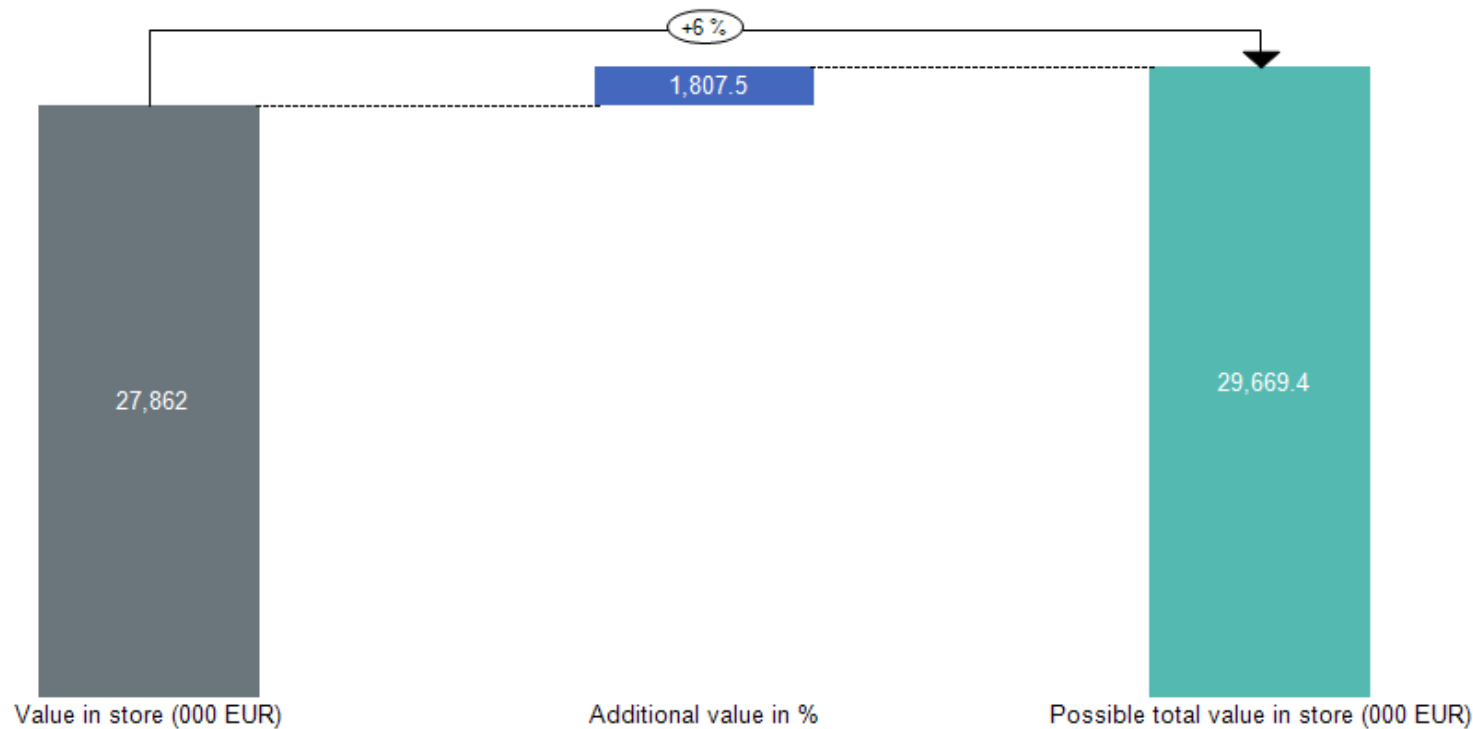
# Coke Regular's value in-store growth is lagging behind total colas, with its value share and retailer customer base value shares (VPE) dropping fast



# A decreased Buyer Closure Rate, combined with decreased loyalty to Lidl, are reducing value exploitation



**If we could get the Coke Regular performance at the same level as FMCG, it would generate an additional 1.8 mio EUR at Lidl**



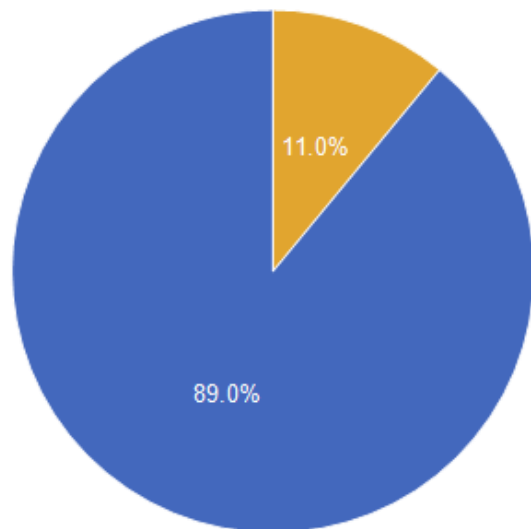
MAT P3 2024 | TCCC Colas Regular  
LIDL | Total | Total Italy | Total | Loyalty class: TOTAL | Relative Base: Article [FMCG / Total]



# At Lidl, the Coke Regular sales loss to the top 4 competitors has increased compared to last year

Value potential (000 EUR): 253,312

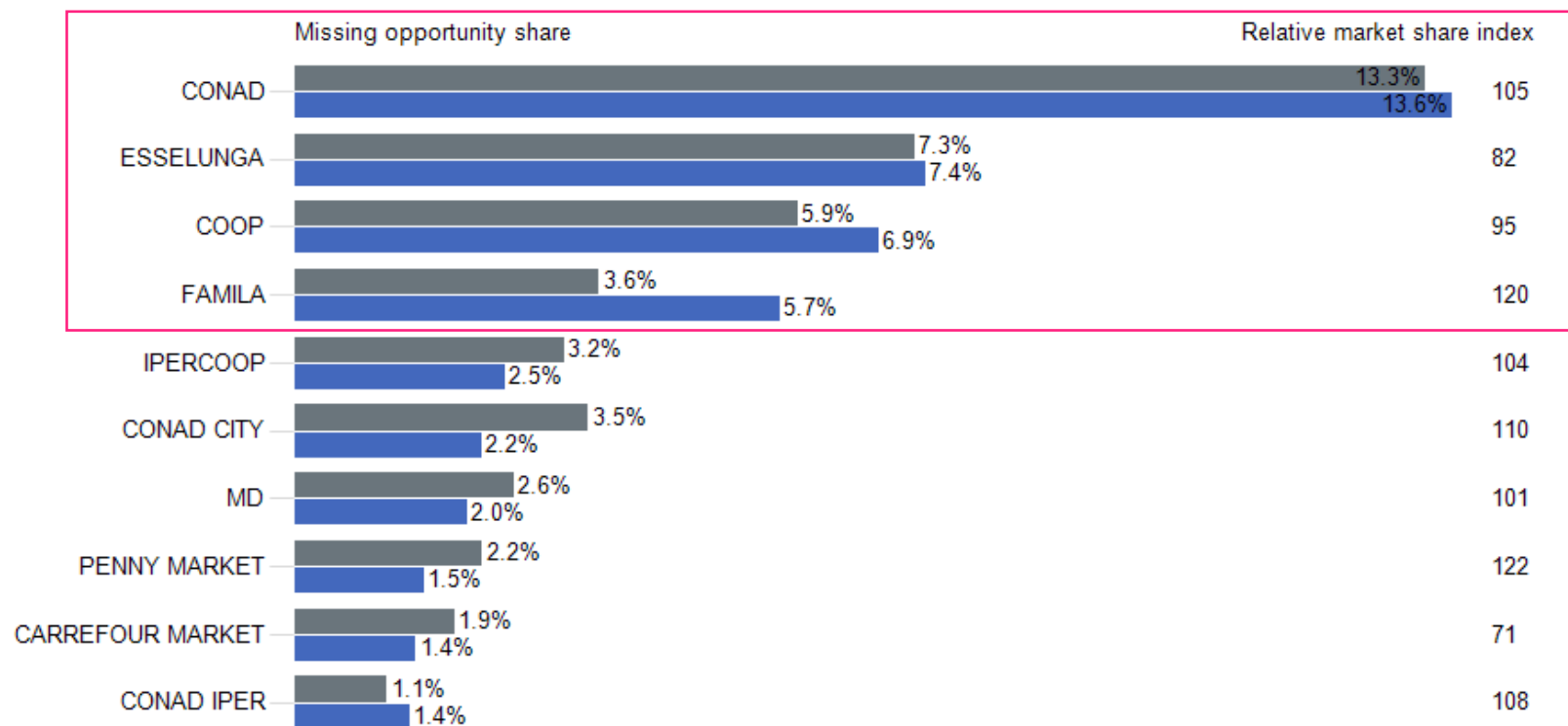
Value potential exploitation  
Missing opportunity share total



MAT P3 2024

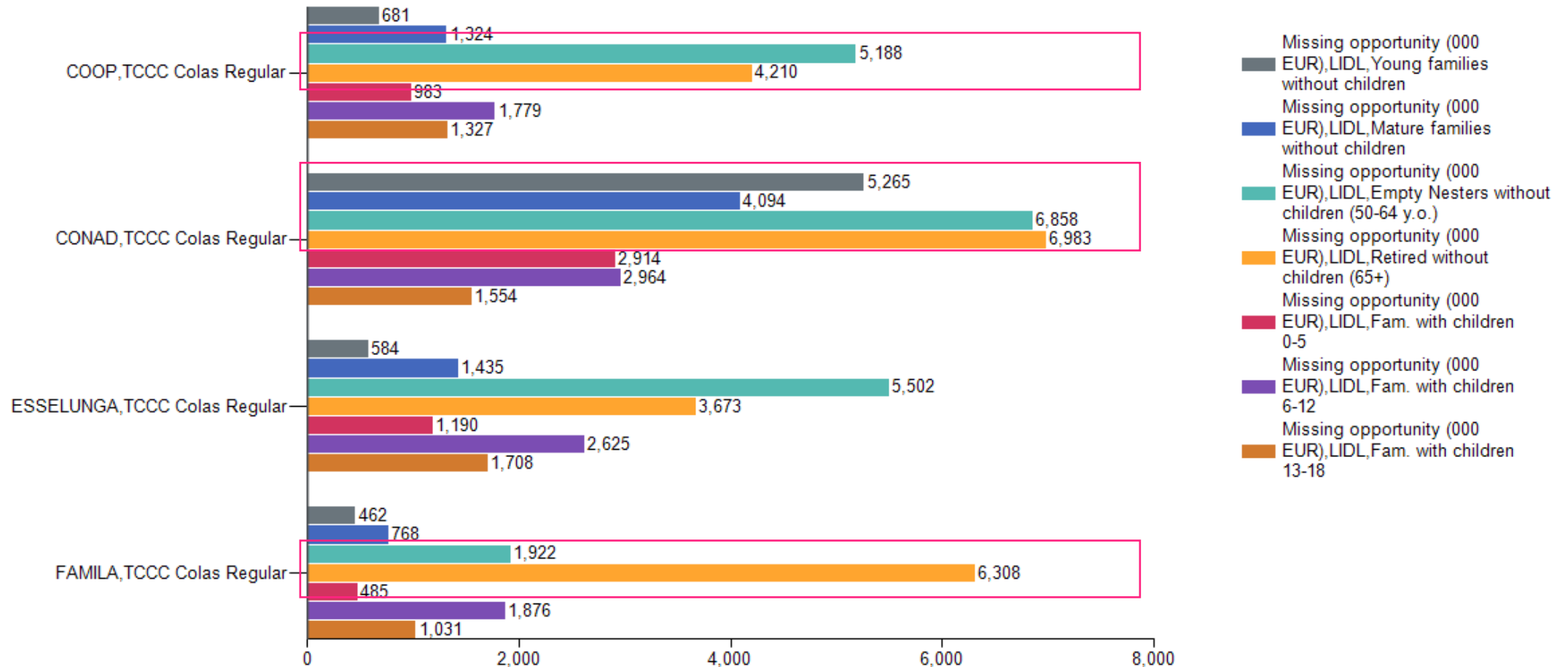
TCCC Colas Regular | LIDL | Total Italy

Missing opportunity total (000 EUR): 225,450

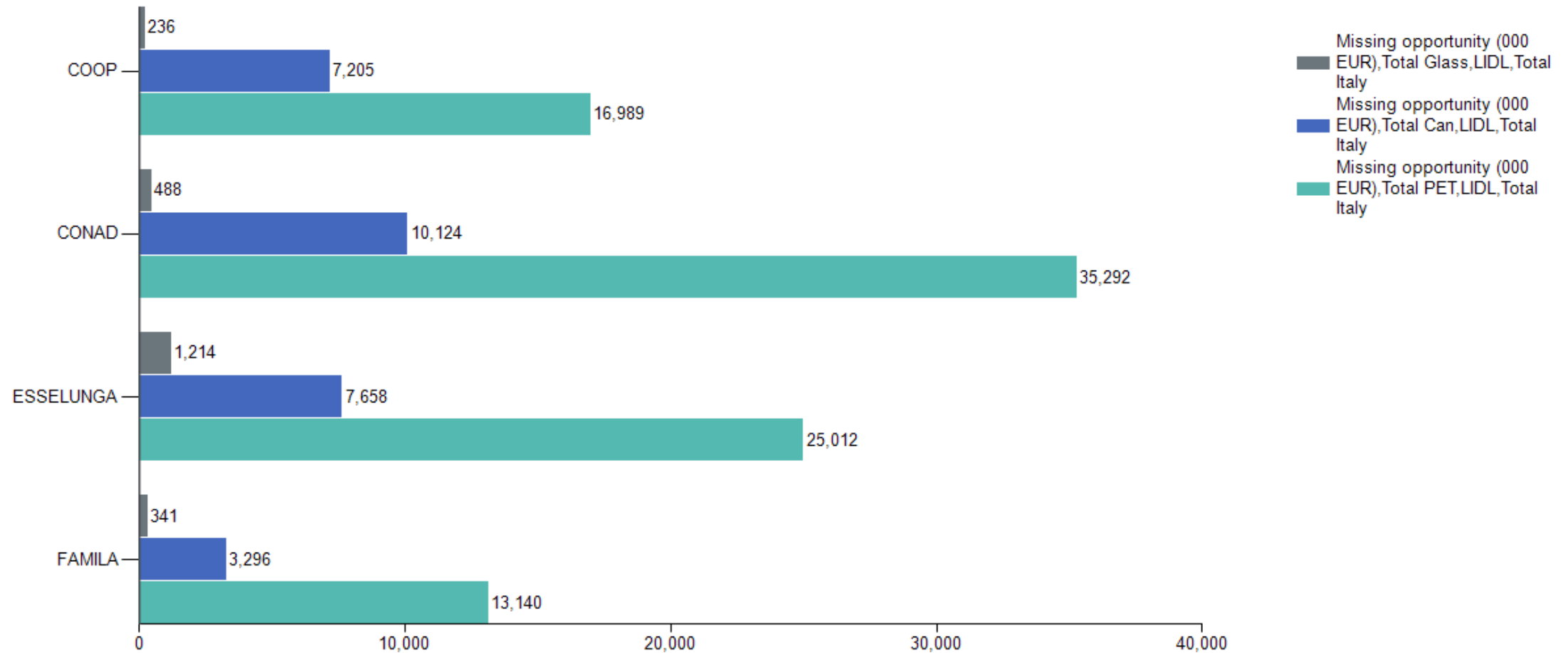


MAT P3 2023 MAT P3 2024

# Empty-Nesters and Retired without children show the biggest potential to win from competing retailers, plus young and mature families without children at Conad



# The biggest opportunity for Lidl to win from these competitors is in PET



MAT P3 2024

# To attract shoppers from the different retailers, we need to focus on different formats: PET >500 <999, and PET >1.25 L <2L



MAT P3 2024

# In summary, we should first identify the issue and then determine how best to capitalize on growth opportunities

## Understand the situation

- Coke Regular loses Value Share within the retailer's customer base (decrease in VPE)
- Declining buyer closure rate, decreasing loyalty combined with an increase in spend outside the retailer

## Understand the opportunity incl. the size of the prize

- Matching Coke Regular value share to FMCG could add over 1.8 million Euros in sales.

## Understand whom to target

- Target shoppers who visit Conad, Coop, Essalunga and Familia
- Focus on Retired 65+, Empty nesters 50-64 and Young and Mature Families w/o children
- Focus on PET in different formats

## Develop a plan and implement

- Assortment
- Planogram
- Point of Sale activation
- Pricing

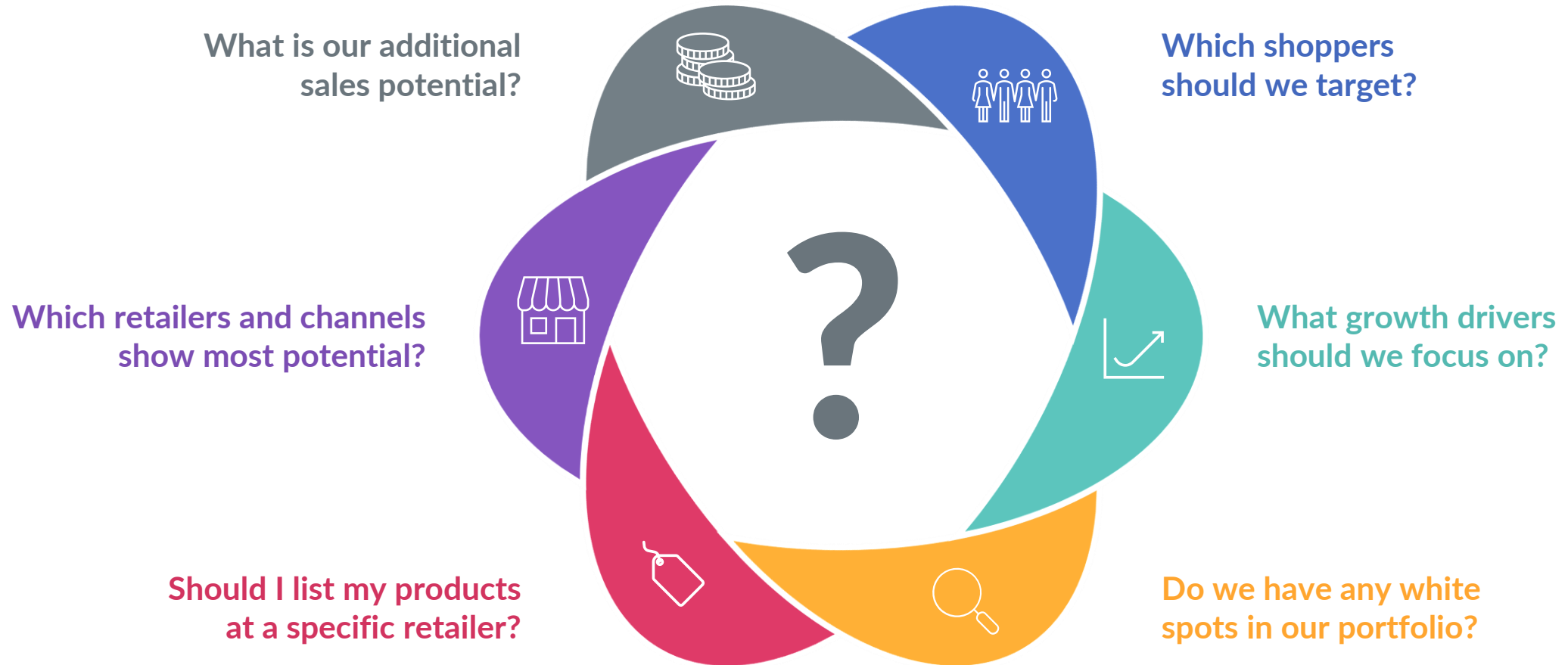
## Track and adapt

- Did we achieve what we wanted?
- Do we see new opportunities to pursue?



# What business questions do you have?

Please get in touch with your local YouGov shopper contact for analysis requests



**Many thanks for your attention!**

# YouGov Consumer Panel – Coca-Cola account team

Feel free to address any of us directly!



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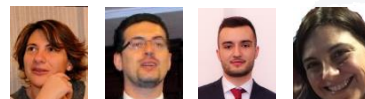
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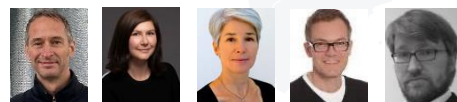
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Thank you

*Coca-Cola*

Consumer and  
Shopper intelligence

