YouGov Shopper Panel Basics (3/3)

Which advanced analytics can help COCA-COLA answer their key questions?

YouGov shopper for Coca-Cola
11/07/2024

Your host today

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

1 | **YouGov Shopper Basics (1/3): How consumer panels work and what you can do with this data**
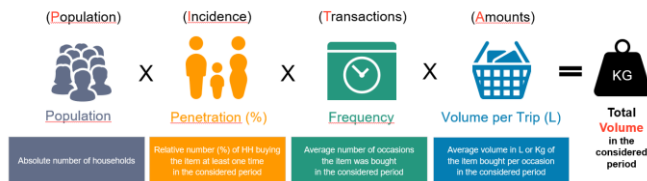
- When: **20.06.2024; 15.00 CET**
- During this webinar you will find out what consumer (=shopper) panel is, how it functions, what basic analyses are available and how to access them. This session suits beginners or irregular users of consumer panel data.

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

- When: **27.06.2024; 15.00 CET**
- During this session YouGov Shopper experts will show you how consumer panel data can support in Category Management process. You will find out how these analyses can help to answer your questions using tools like SimIT / SIV.

3 | **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.

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.

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

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

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

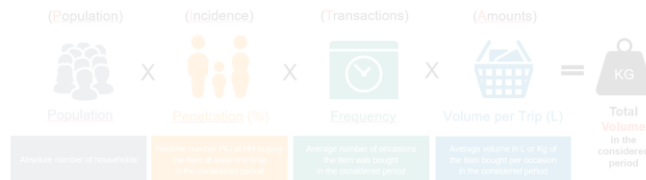**1** **YouGov Shopper Basics (1/3): How consumer panels work and what you can do with this data**

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Agenda for today

1   Overview Advanced Solutions

2   Deep Dive on Selected Solutions & Case Studies
1.   Paint a Picture
2.   Cash Bill analysis
3.   Promotion evaluator

3   Further Training Material & Q&A

1 Overview Advanced Solutions

"Advanced Solutions" – What?

YouGov Shopper

**Classic
Shopper Panel
Analyses**

e.g. Penetration and other
KPIs, Combination Analysis
or Gain & Loss…

**Advanced
Solutions**

advanced analytic
methodologies to answer
complex questions

e.g. special promotion
questions, questions about
price setting or
target groups like
segmentation…
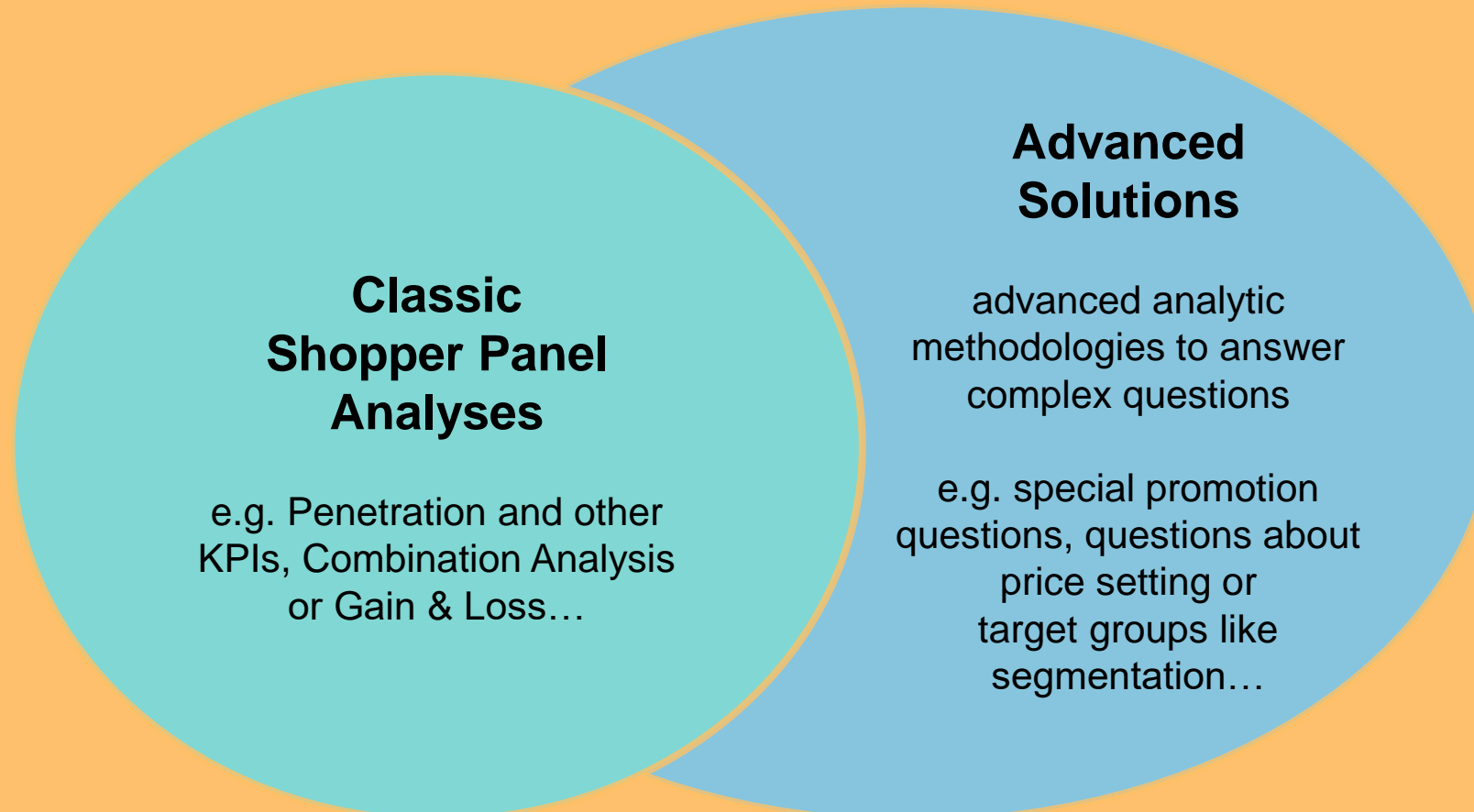
We offer fact-based solutions — fully dedicated to FMCG

Strong Data

Single Source Approach

FMCG Knowledge

Measure what can be measured. Ask to reveal what's on their mind. We are founded on behavioral data. We link it to state-of-the-art surveys to complete the picture.

Experts with the pulse on your market. We constantly explore, measure, benchmark and predict FMCG markets.

Strong Products

Strong Consultancy

Shopper Focus

Purchase is the moment of truth. We know how to win the decision in this very moment – for the channel, retailer and brand.

We follow shopper footprints

Over time. ⟶ **Across places.**
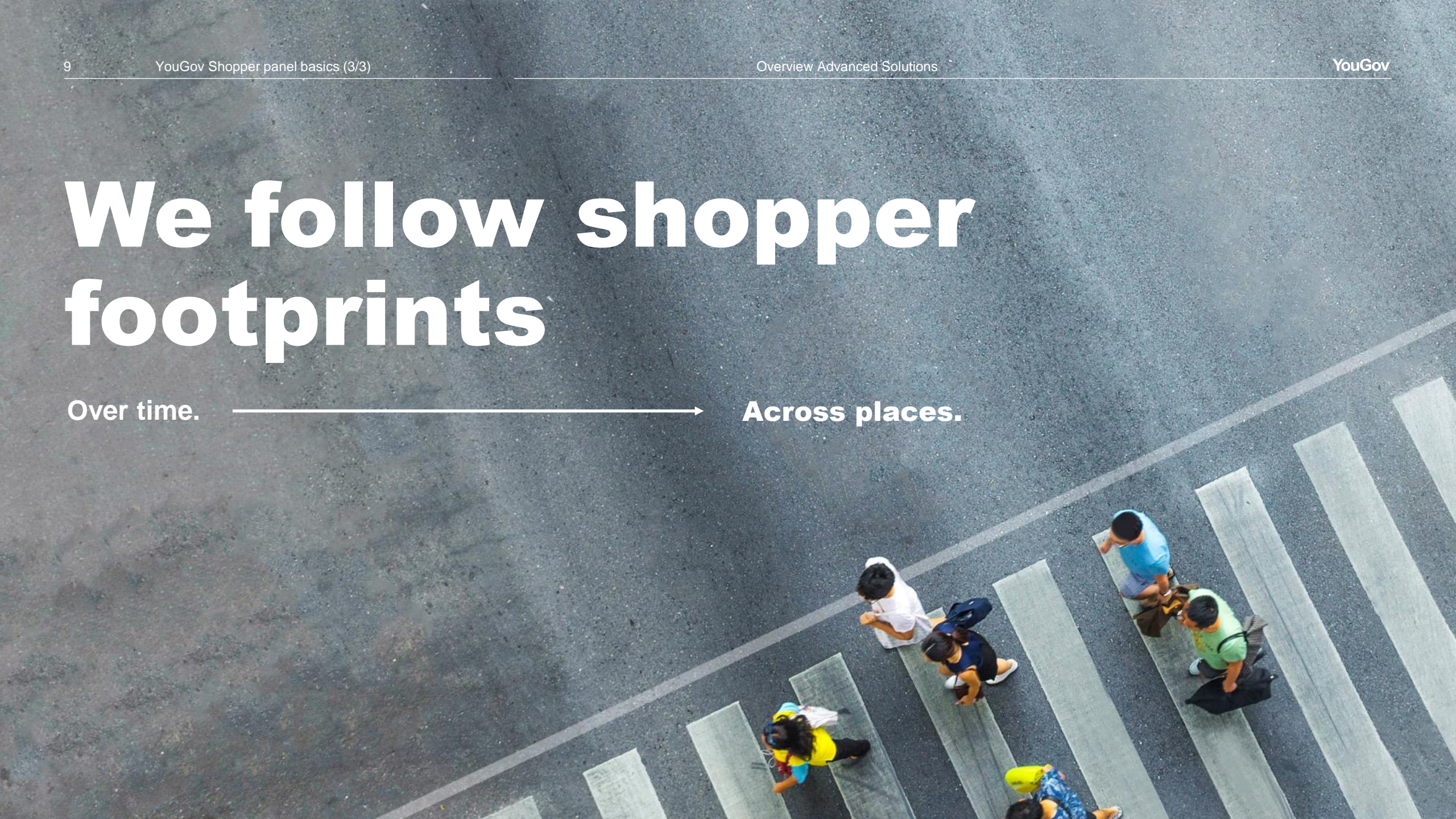
We explore the FMCG shoppers literally 360°

Based on realistic and reliable data

Observing the same persons shopping behaviour over time with comprehensive scope

▼

Our purchasing data reveals:

- patterns
- switching
- trends
- predictions

What is bought

What is thought

Completing with attitudinal data from three integrated sources

▼

Our integrated survey insights go beyond and tell you **what shoppers think and feel**

buy | **why**

| In-Home & Out of Home | Stationery & e-commerce | Big retailers & specialized trade | | Panellists' attitudes, values & needs | **why2buy** Individual panellists deep-dives | Customized ad hoc research (Qual & Quant) |

We own a comprehensive statement set

Available at the touch of a button

Lifestyle &
Living Situation

Purchasing Routines
& Preferences

General Product
Preferences

Personal Attitudes &
Values

Important Features for
Retailer Choice

Identify & define any target group on measured data

Thoroughly understand
and differentiate your target
group across all areas of life

Covering **all relevant topics
around shopper attitudes & values**
to complement the measured behaviour

Local specifics PLUS globally harmonized set

Leisure
Preferences

Media Usage
Behaviour

Nutrition/
Health/ Diet

Cooking &
Eating Habits

Environment/ Bio/
Sustainability

why2buy offers individual panel deep-dives

To receive tailor made answers to your questions

- Reach **any target group** based on factual behaviour – also non-buyers

- **Survey directly** into Consumer Panel
- **Customized** to your questions

- Link survey insights to **purchase KPIs**
- Get **single source** united results

Purchase data   **Target groups**

Consumer panel

UNITING

why2buy

Usage & attitudes   **Needs**   **Drivers & barriers**
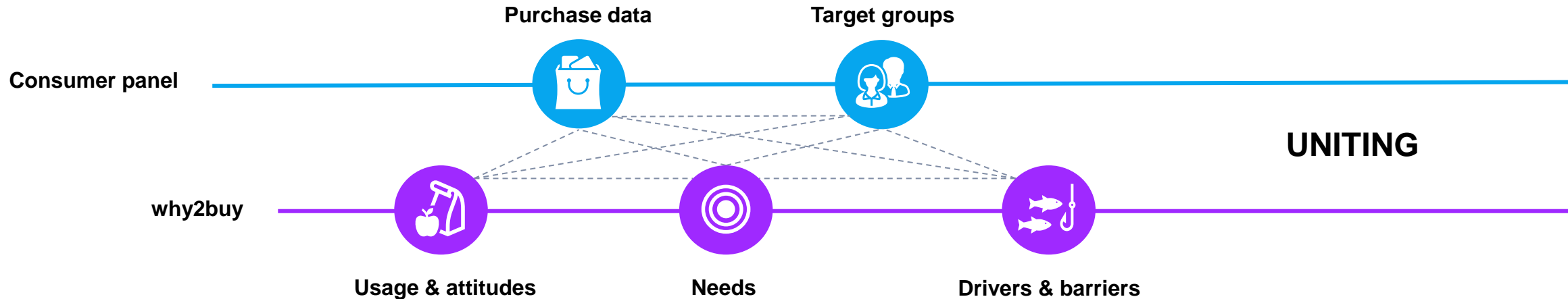
We connect the dots...

…with our analytics & consultancy to guide you through your business decisions
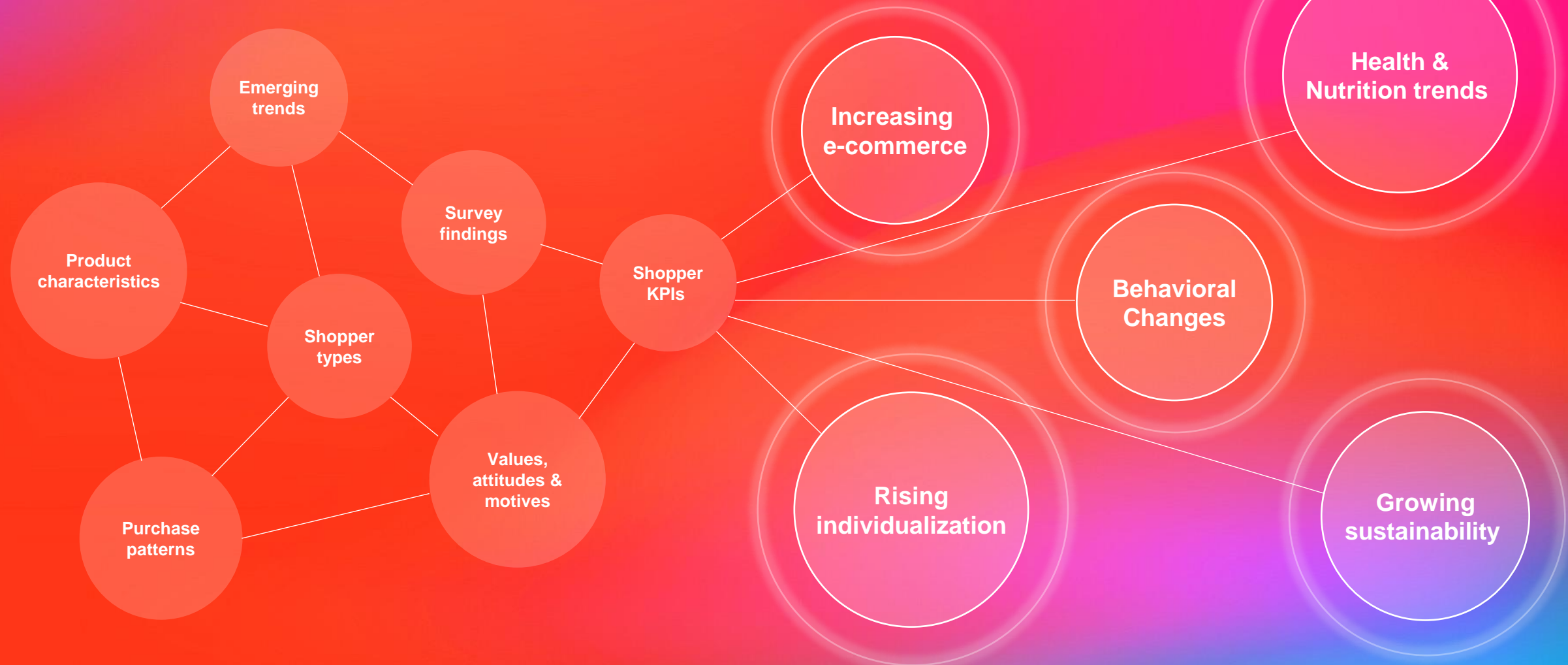
We focus on the core areas of FMCG: Marketing, CatMan and Sales

For Manufacturers and Retailers

Setting the Scene – Landscaping

Target Group Management

Category, Shelf & Assortment

Innovation & Launch Management

Price & Promotion Management

Path to Purchase

Communication

Strong Data

Single Source Approach

FMCG Knowledge

Strong Products

Strong Consultancy

Shopper Focus
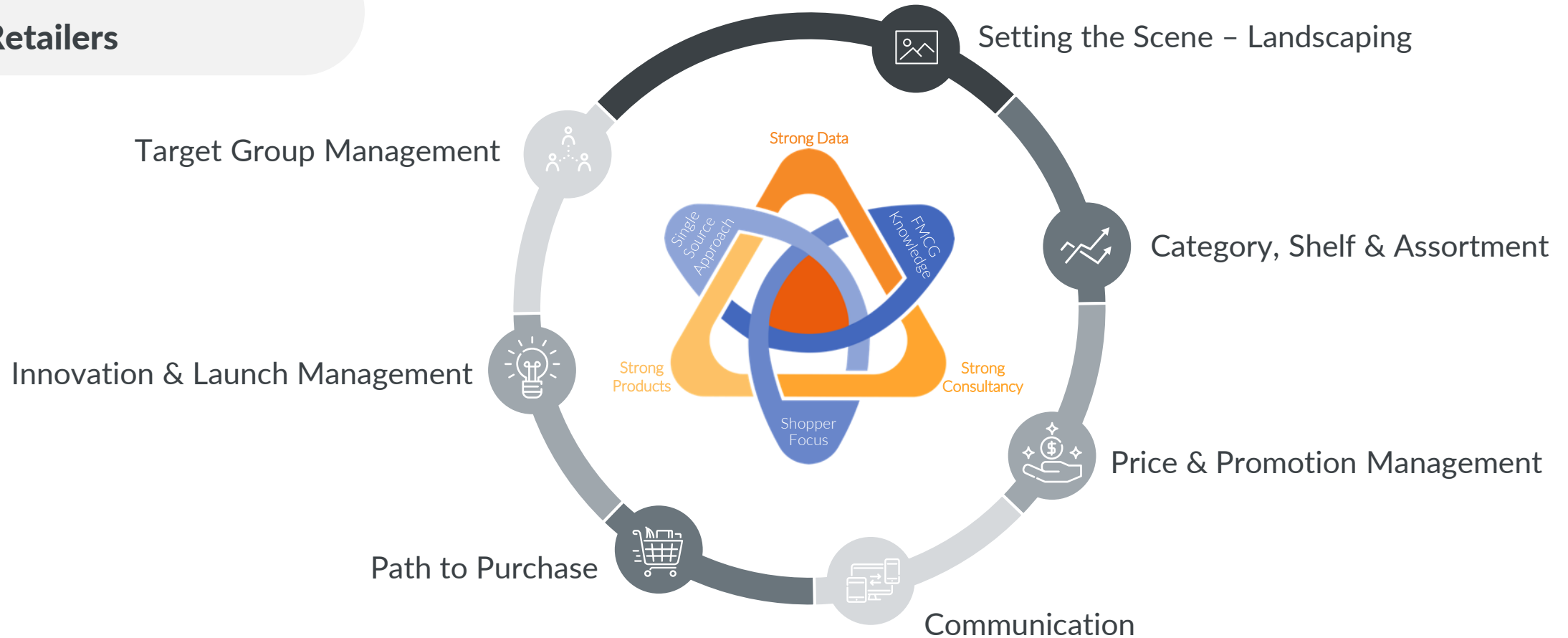
2 Deep Dive on Selected Solutions & Case Studies

Target Group Management

Typical questions that we answer

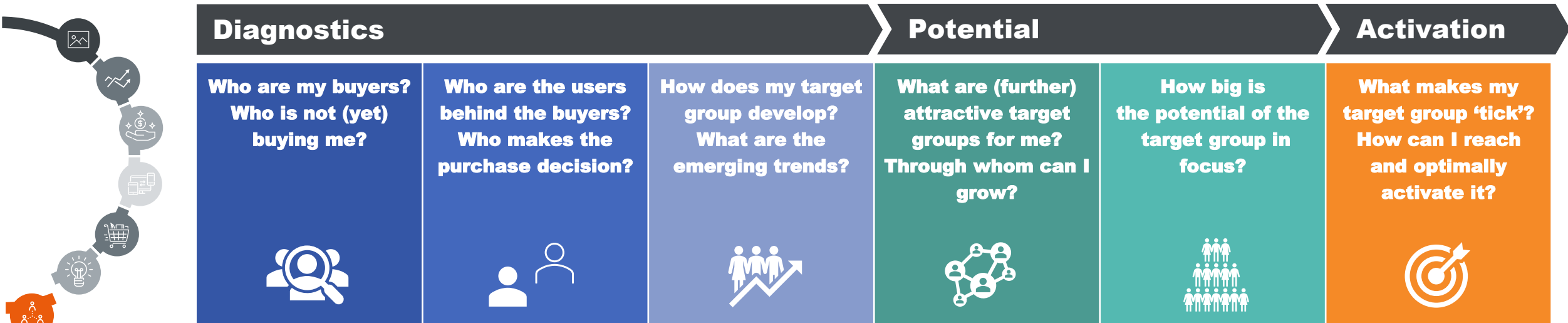| Diagnostics			Potential		Activation
Who are my buyers? Who is not (yet) buying me?	Who are the users behind the buyers? Who makes the purchase decision?	How does my target group develop? What are the emerging trends?	What are (further) attractive target groups for me? Through whom can I grow?	How big is the potential of the target group in focus?	What makes my target group 'tick'? How can I reach and optimally activate it?

Focus today:

Paint a Picture
Portraying your target group

01

Effective and efficient target group activation with "Paint a Picture"

Portraying your target group
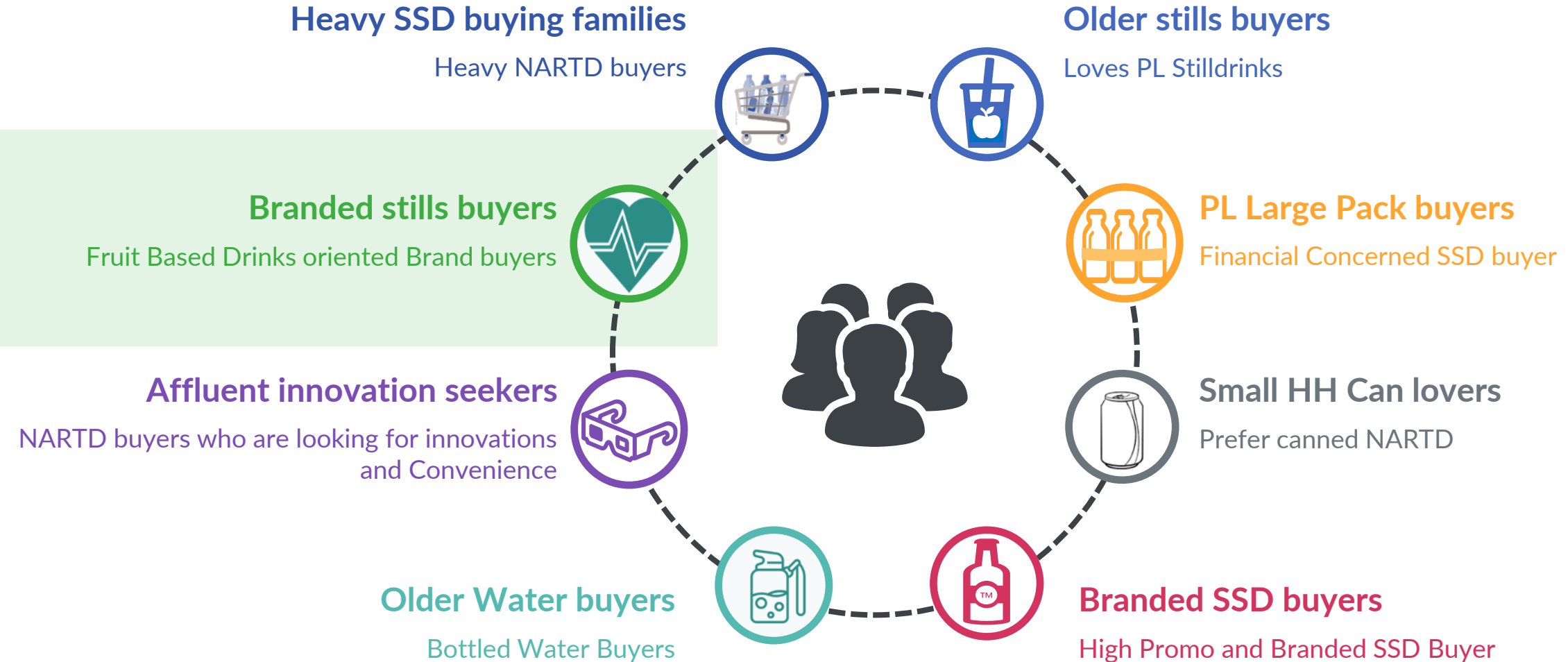
Case Study #1
Paint a Picture

Portraying Branded stills buyers in Netherlands

The study "Meet the NARTD Shoppers", a segmentation study, gives a deep understanding of the different Dutch NARTD shoppers and how they can be attracted by portraying their sociodemographic profile, attitudes, values, shopping preferences and actual shopping behavior.
One of the Dutch NARTD Shoppers are the Branded stills buyers.

Let´s meet them!

Meet the NARTD Shoppers and in particular the Branded still buyers

Heavy SSD buying families
Heavy NARTD buyers

Older stills buyers
Loves PL Stilldrinks

Branded stills buyers
Fruit Based Drinks oriented Brand buyers

PL Large Pack buyers
Financial Concerned SSD buyer

Affluent innovation seekers
NARTD buyers who are looking for innovations and Convenience

Small HH Can lovers
Prefer canned NARTD

Older Water buyers
Bottled Water Buyers

Branded SSD buyers
High Promo and Branded SSD Buyer

Branded stills buyers

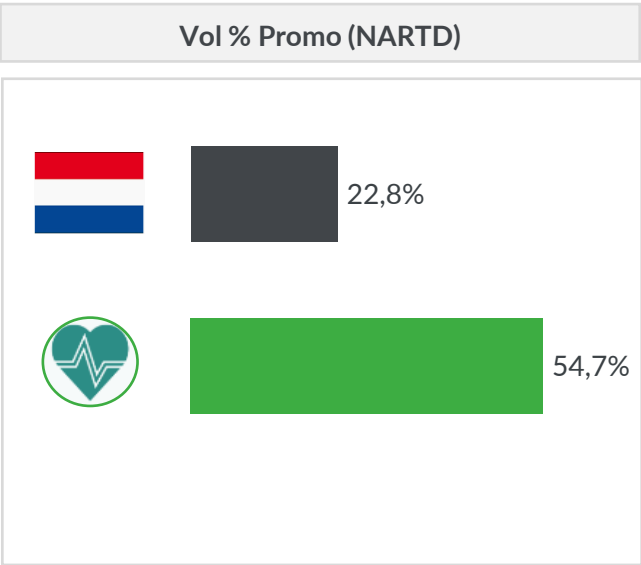**Branded stills buyers**

> - Family oriented
> - Health concerned older households
> - Planned shoppers
> - They like to buy branded FBD
> - Heavy promo focus
> - They buy large packs / multi
> - Feel retailers should be socially and environmentally responsible

Buyer% 12,2%

Value% 10,0%   Index vs buyers 82

Volume% 8,4%   Index vs buyers 69
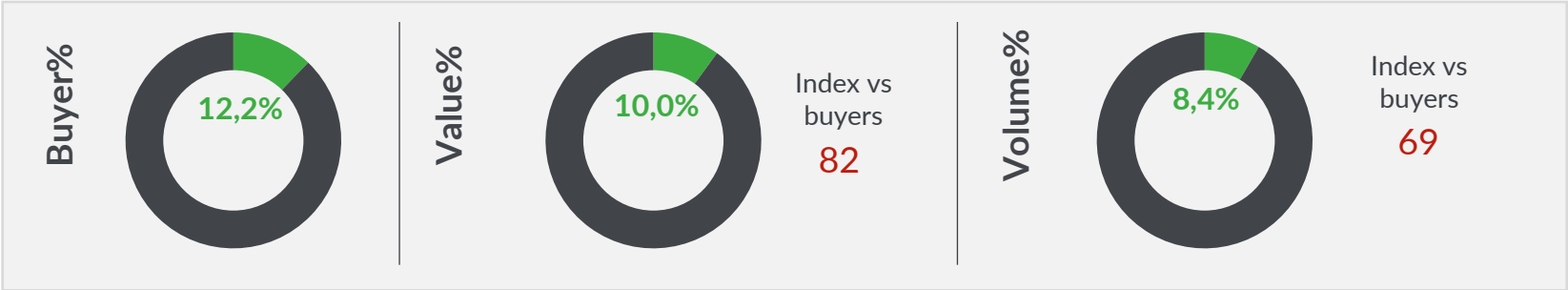
NARTD KPI's

	KPI's	Index
Frequency (trips/year)	37,0	86
Volume per Buyer (L/kg)	129	69
Volume per Trip (L/kg)	3,5	80
Spend per Buyer (EUR)	180,00	83
Spend per Trip (EUR)	4,86	96
Average Price (EUR/(L/kg))	1,40	120
Number of main brands	9,5	117

Vol % Promo (NARTD)

22,8%

54,7%

Source: YouGov| Netherlands | NARTD | MAT 2023 week 44

Branded stills buyers

Vol % Sparkling (NARTD)	🇳🇱	53,6%
	❤	26,6%

Vol % Sugar (NARTD)	🇳🇱	52,5%	5,1%	42,4%
	❤	33,0%	13,6%	53,5%

no Sugar (incl light)   Low sugar   High sugar

Where they buy NARTD:

Penetration within segment

average number of stores 3.0   Index

Store	Penetration	Index
AH	88%	121
JUMBO supermarkten	42%	81
ALDI	19%	71
LIDL	38%	81
Dirk	30%	142
PLUS	37%	129
Other SPM	50%	99

Volume %   Index

Volume %	Index
48%	155
10%	50
2%	30
5%	29
8%	166
13%	173
15%	95

NARTD Segments

Vol%   Index

Segment	Vol%	Index
SSD Colas	10,2%	43
SSD Flavours	6,4%	62
SSD Mixers_Incl Adult	3,5%	93
Ice-Tea sparkling	2,2%	134
Ice-Tea still	16,5%	200
Energy drinks	0,4%	40
Sport drinks	0,6%	64
FBD Juices 100%	15,2%	187
FBD Nectars	10,3%	175
FBD Still drinks	14,2%	225
Water plain sparkling	1,4%	15
Water plain still	3,0%	39
Water flavoured sparkling	2,8%	60
Water flavoured still	6,5%	207
Ice-Coffee	1,3%	172
Syrups	5,3%	127

Vol % NARTD	🇳🇱	13,7%	29,4%	19,4%	37,4%
	❤	15,9% / 11,8%	4,2%	68,2%	

Vol % Cola	🇳🇱	38,6%	26,2%	20,7%	14,5%
	❤	65,1%	3,6% / 7,9%	23,3%	

Vol % SSD (incl Adult)	🇳🇱	31,2%	26,0%	18,4%	24,4%
	❤	45,7%	8,5% / 3,7%	42,1%	

Vol % Fruitflavoured	25,5%	31,8%	17,6%	25,1%
	39,8%	11,7% / 5,0%	43,5%	

Vol % Ice Tea	15,9%	25,2%	20,0%	38,9%
	34,7%	5,9% / 2,5%	56,8%	

CCEP
PL hyper/super
HD PL
Other Brands

Branded stills buyers

Source: YouGov| Netherlands | NARTD | MAT 2023 week 44

Branded stills buyers

Index vs total	Profiles	Vol %
154	Pension, high inc	22,1%
110	Pension, low inc	6,7%
100	Single 40-65 years	9,6%
91	Wage earner (2p)	7,6%
99	HH with kids, high inc	31,4%
69	HH with kids, low inc	9,5%
95	Double income, no kids	8,0%
65	Young Singles (<40)	5,2%

YouGov Life Cycle

Index vs total	Profiles	Vol %
89	5+ Persons	8,7%
95	4 Persons	18,6%
85	3 Persons	12,8%
113	2 Persons	35,1%
101	1 Person	24,7%

#Persons

Index vs total	Profiles	Vol %
145	Shopper 65+ jr	30,2%
93	Shopper 50 - 64 jr	32,6%
85	Shopper 40 - 49 jr	18,9%
98	Shopper 30 - 39 jr	13,8%
58	Shopper < 30 jr	4,5%

Age

Index vs total	Profiles	Vol %
83	South	21,7%
122	East	25,1%
83	North	8,5%
104	West Other	29,3%
104	3 big cities + aggl	15,4%

District

Index vs total	Profiles	Vol %
85	Low <€1900	20,0%
95	Mid €1900-€3500	28,9%
111	High >€3500	51,1%

Income

Source: YouGov| Netherlands | NARTD | MAT 2023 week 44

Branded stills buyers

Lifestyle Attitudes

- **Family oriented**: spending **time** with the family is more **important** to them and is more **meaningful** to them
- They also indicate they want to spend **more quality time** with their **children**
- **Personal** and **household hygiene** is more important to them
- Enjoy **gardening** and **baking** and are more **religiously / spiritually** active, but are less fan of DIY projects/activities

Nutrition & Health

- Pay **above average** attention to nutrition and health and **exercise more** often to stay fit, but see themselves **less** as **knowledgeable** on the topic
- Are **more** active in **reducing** meat **consumption**, but identify themselves **less** as vegetarian or vegan
- **Like to cook** and are bigger fans of **cooking hot meals** every day. They have no bigger preference for quick or fancy meals, but are **much lesser fans** of eating **OOH**

Media Habits

- Much more **active** with **advertisements**: they read **newspapers** with **ads** more and use **information** from advertisement **mails** and (online) **leaflets** much more often
- They are also **less distrusting** of advertisements
- Consume **more traditional** media (tv, radio, magazines, newspapers) but **less contemporary** media (podcasts, social media, streaming, etc.)

Shopping Attitudes

- **Planned shoppers**: they make **shopping lists** more often and make **less spontaneous** purchases
- They are **much more promo-focused**, and check offers much more compared to the average shopper
- They are **less** bound by **a single-store shopping**, more feeling they can better **fulfill** their shopping **lists** and get **better prices** by **spreading out** shopping trips across multiple stores
- Are more **open** to try and buy food that is **locally** sourced or has a **Dutch origin**
- Prefer buying products **free** from **artificial sweeteners** and **additives** more
- Value **retailers** being **socially** and **environmentally** responsible more and contribute to **plastic reduction**. They **themselves** also have a **larger** preference for **sustainable** products (such as products free from GMO's, clear origin, etc.)

Paint a Picture

Portraying your target group for effective and efficient activation

Business questions

For a successful **communication, assortment and/or sales strategy** the characteristics of your target group, their particularities and needs, must
be fully understood:

- How is their lifestyle? What are their values and attitudes?

- What is their purchasing behaviour in the category? What preferences do they have?

→ **Where are barriers? Where could be levers?**

Research approach

Paint a Picture brings all relevant dimensions together to an integrated 360° profile of your target group:

- Holistic information provided by YouGov Consumer Panel (data already available) to describe the core group (e.g. heavy buyers or other focus segments).

- Filter the distinctiveness of your focus target group and draw relevant conclusions on how to successfully activate this consumer group.

Benefits

- USP: The single source approach!

- Paint a Picture gives valuable insights through **the unique combination of diverse data from one single source, the YouGov Consumer Panel**:

(measured) factual purchase behavior	**+**	(queried) attitudinal statements

- Benefit from **360° information of our panellists** – in the category and across.

Outcome

- The basis for effective targeting!

- Paint a Picture delivers **thorough consumer profiles** of your target group incl. demographics, usage & attitudes, lifestyle, values & needs, purchase behaviour & preferences and optional: media usage

- Specific **conclusions regarding communication, portfolio and sales strategy** show how to activate your key consumers most effectively.

Output examples

We own a comprehensive statement set

Available at the touch of a button

Lifestyle &
Living Situation

Purchasing Routines
& Preferences

General Product
Preferences

Personal Attitudes &
Values

Important Features for
Retailer Choice

Identify & define any target group on measured data

Thoroughly understand
and differentiate your target
group across all areas of life

Covering **all relevant topics
around shopper attitudes & values**
to complement the measured behaviour

Local specifics PLUS globally harmonized set

Leisure
Preferences

Media Usage
Behaviour

Nutrition/
Health/ Diet

Environment/ Bio/
Sustainability

Cooking &
Eating Habits

International comparisons are possible thanks to identical statements across the YouGov shopper countries

Thanks to an identical statement set across countries, we can offer a harmonized "Paint a Picture" for all **16 countries** of the Consumer Panel

And even more data are available from YouGov with...

YouGov® Profiles

55+ markets

24+ million registered members

15+ years of historical brand data

Single-Source-Data

200.000 Variables & millions of data points

Weekly updates

Available via Online-Dashboard

Demographics

Economic Situation & Topical

Consumer Behaviour & Lifestyle

Personality

Interests
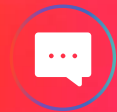
Attitudes

Brand Usage

Brand Perception

Consumer Journey

Media Consumption Media Reach & Frequency

Travel & Mobility
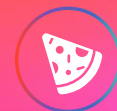
Eating & Drinking

YouGov® BrandIndex

Daily insights into the performance of your brand

16 Key Metrics

Sample representative of the population

Over 1,500 brands, organized in 47 sectors

Daily measurement: 100 respondents per sector per day

16 KPIs for measuring brand performance

Historical data

Media & Communication
Ad Awareness | Aided Brand Awareness
Attention | Buzz | Word of Mouth

Purchase Funnel
Purchase Intent | Consideration
Current Customer | Former Customer

Brand Perception
Impression | Satisfaction | Quality
Value | Reputation
Recommendation

Path to Purchase

Typical questions that we answer
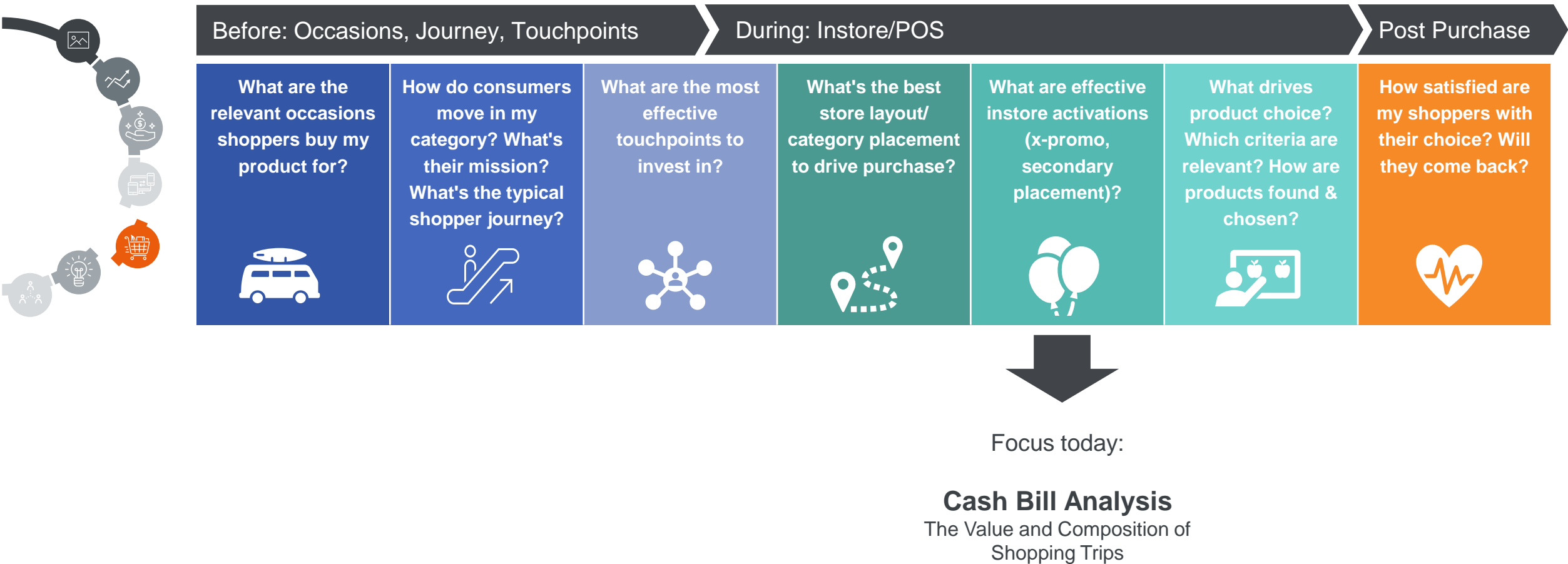
Before: Occasions, Journey, Touchpoints			During: Instore/POS			Post Purchase
What are the relevant occasions shoppers buy my product for?	How do consumers move in my category? What's their mission? What's the typical shopper journey?	What are the most effective touchpoints to invest in?	What's the best store layout/ category placement to drive purchase?	What are effective instore activations (x-promo, secondary placement)?	What drives product choice? Which criteria are relevant? How are products found & chosen?	How satisfied are my shoppers with their choice? Will they come back?

Focus today:

Cash Bill Analysis
The Value and Composition of
Shopping Trips

02

Cash Bill Analysis (CBA)

- The Value of Shopping Trips (CBA "Value")
- The Value of Promotion Shopping Trips (CBA "Promo")
- Understanding Combination Purchases (CBA "Combi")

Case Study #2
Cash Bill Analysis (Value & Combi)

Is NARTD the most important category for retailers among smaller shopping baskets?

The smaller size shopping baskets of households in service supermarkets in the Netherlands are analysed in detail to assess the importance of NARTD for retailers.

The comparison of the spend per basket for NARTD, fresh food and total FMCG leads to insights what purchases are more valuable.

Details on what other categories are purchases in the same basket completes the picture.

The original project in the Netherlands had an extended content with further comparisons of retailer channels and basket sizes.

NARTD baskets have € 4,69 higher Cash Bills and higher spend on Fresh Food!

How valuable are NARTD category buyers for the retailer?

Service Supermarkets (Bricks) – Medium & Small Baskets

FMCG basket

NARTD basket

Spend per basket (€)	FMCG	NARTD	Fresh Food		FMCG	NARTD	Fresh Food
	15,21	0,73	7,97		19,90	4,15	8,69

Incidence rate – basket with …		18%	87%			100%	86%
Share of … (€)		5%	52%			21%	44%

Source: YouGov |Netherlands | FMCG | MATQ3 2023 Full panel | Medium baskets: 5-9 categories per basket | Small baskets: 4 categories or less per basket
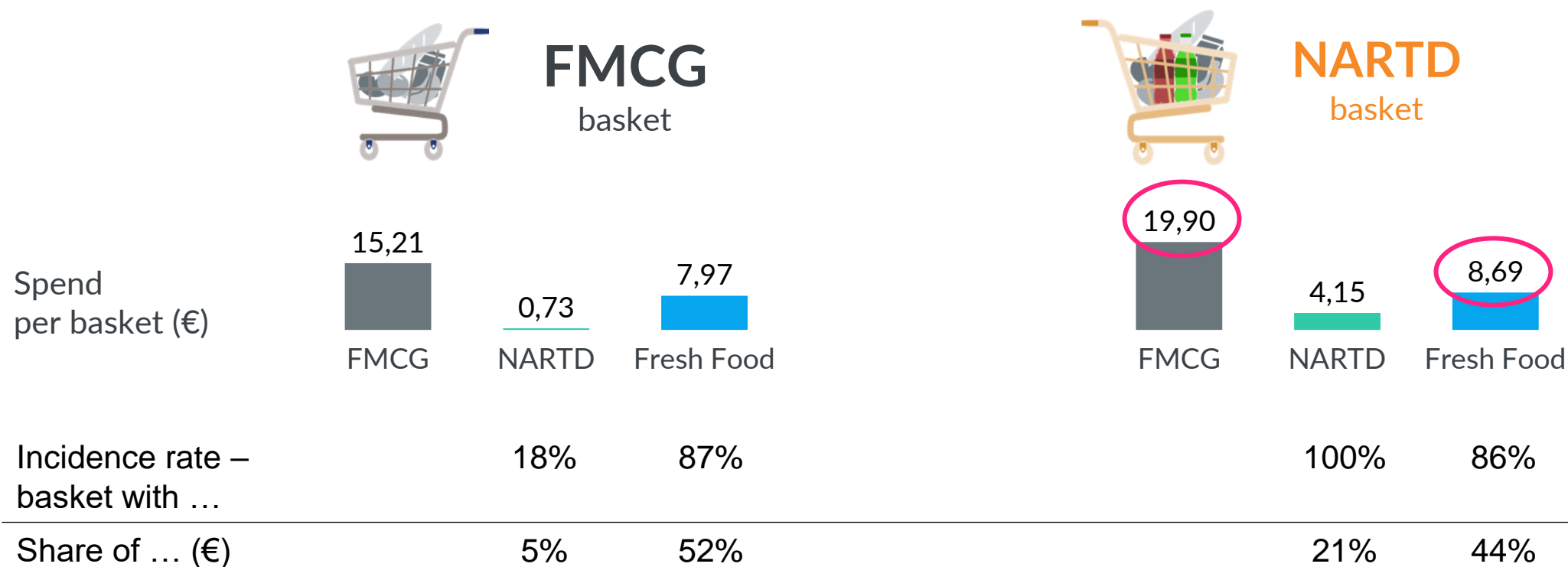
NARTD baskets contain more often 'indulgence' categories

What else is in these baskets?

Service Supermarkets (Bricks) – Medium & Small Baskets

Top 5 Categories (€)	Bread	Dairy chilled	Cold cuts & salads	Fruit	Vegetables (unprocessed)
FMCG basket	36%	33%	25%	24%	23%
NARTD basket	**39%**	**35%**	25%	24%	22%

Top 5 Categories NARTD Baskets (over-index > 127)

1 Crisps/nuts/toast 136

2 Ice cream 134

3 Sanitary paper 130

4 Baby food 129

5 Beer 127

NARTD Medium & Small baskets at service supermarkets contain more often:
- 'indulgence' categories like crisps, ice cream, beer, but also sanitary paper & baby food
- Spend for bread and chilled dairy are higher

Source: YouGov |Netherlands | FMCG | MATQ3 2023 Full panel | Medium baskets: 5-9 categories per basket | Small baskets: 4 categories or less per basket

Cash Bill "Value" Analysis

Understanding the value of shopping trips

Business questions

For the realization of different POS activities, displays, listings etc. shopper marketing & category management ask for quantitative KPI's that demonstrate the **overall value of the brand for the retailer.**

- Which brands directly or indirectly help a retailer's total turnover (due to high product/total cash bill)?

- Which brands attract shoppers that are especially valuable to the retailer (because of large cash bills or high share of purchases at regular prices)?

Research approach

The Cash Bill Analysis looks at the focus product purchases, **measures the value of the total shopping trip and analyses its structure** (e.g. promo vs. non-promo)

- The more money the buyers of a product spend overall in-store and the more shoppers are enticed into the stores by the product, the more valuable it is for the retailer

- **Benchmarks** allow for comparison to competitor products or retailers

Benefits

- Cash Bill Analysis supports **fact-based consultancy of retailers** by demonstrating the contribution of brand(s) to the overall success of the category and the retailer, thus going beyond mere revenue

- Helps to **optimize the assortment** in order to maximize the total turnover of the retailer

- The big sample size of our consumer panel provides **high reliability** and high detail regarding the analysis of the cash bill

Outcome

Cash Bill Analysis delivers concrete KPI's for the quantification of a brand's direct and indirect value for retailers

- **Cash bill value** (focus product + rest-cash bill)

- **Promo share of rest-cash bill** (the higher the rest-cash bill at regular prices, the higher is the retailer margin - *optional*)

- **Importance of brand/product for total turnover** of the retailer (residual basket with further FMCG products at normal prices X shopper traffic)

Output examples
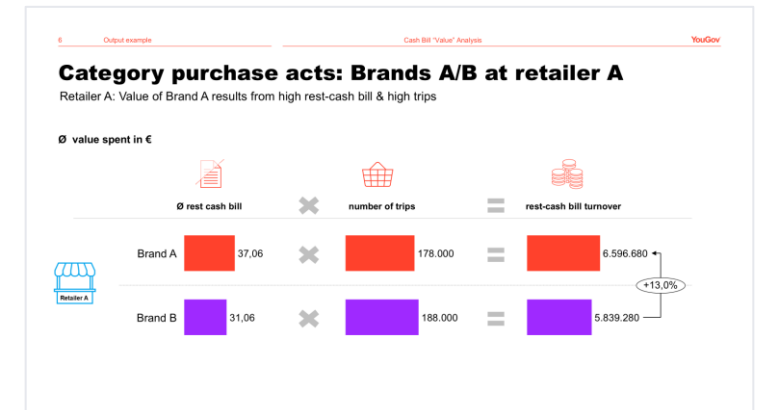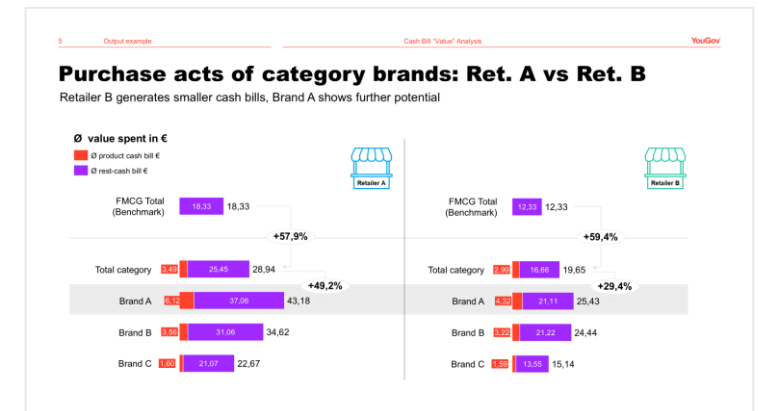
Cash Bill "Combi" Analysis

Understanding combination purchases

Business questions

The optimal arrangement of store layouts, secondary displays or cross-promotions demands deep knowledge of the shopper behaviour in store:

- **Which categories should be placed next to each other** because they are frequently purchased in combination?

- **Which product combinations are promising** for cross-promotions?

Research approach

The Cash Bill Analysis **focuses on cash bills of total shopping trips and delivers details on their structure and composition**

- The analysis answers, which products or categories are often purchased in combination, how much value is spent in total for these combination trips and which products / brands play a prominent role

Benefits

The Cash Bill Analysis **shows the value of combination purchases.**

- Identifies **opportunities for cross-promotions**

- Delivers arguments **for placing and secondary displays**

- The big sample size of our consumer panel provides **high reliability** and high detail regarding the analysis of the cash bill
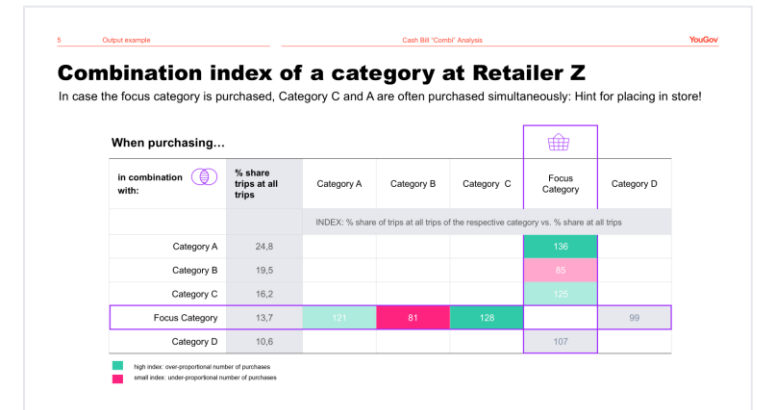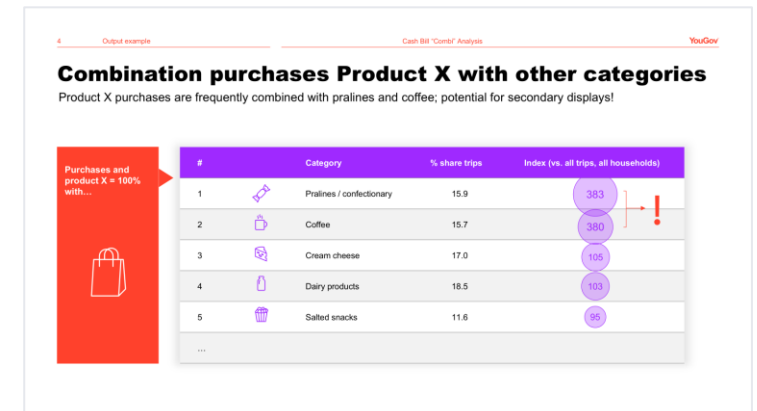
Outcome

Cash Bill Analysis delivers concrete KPI's for the assessment of combination purchases:

- **Frequency of shopping trips** for the product or category in focus

- **Added value of combinations** (focus category + rest-cash bill)

- **Relevance for important target groups** (e.g. whether target groups in focus have purchased disproportionally)

Output examples

Combination purchases Product X with other categories

Product X purchases are frequently combined with pralines and coffee; potential for secondary displays!

#		Category	% share trips	Index (vs. all trips, all households)
1		Pralines / confectionary	15.9	383
2		Coffee	15.7	380
3		Cream cheese	17.0	105
4		Dairy products	18.5	103
5		Salted snacks	11.6	95

Combination index of a category at Retailer Z

In case the focus category is purchased, Category C and A are often purchased simultaneously: Hint for placing in store!

When purchasing... in combination with:	% share trips at all trips	Category A	Category B	Category C	Focus Category	Category D
		INDEX: % share of trips at all trips of the respective category vs. % share at all trips				
Category A	24,8				136	
Category B	19,5				85	
Category C	16,2				125	
Focus Category	13,7	121	81	128		99
Category D	10,6				107	

high index: over-proportional number of purchases
small index: under-proportional number of purchases

Case Study #3
Cash Bill Analysis (Promo)

The value of promotion shopping trips

60 important corner products for the promotion business are analysed across the top retailers in Germany to identify the value of KO´s promotion business in the field of competition.

The comparison of the spend per basket in non-promotion weeks vs. promotion weeks gives meaningful insights and arguments for the talks with retailers.

Generated shopper traffic and its uplift, value for buying products in the same trip that are not in promotion and the Golden Bill shows the importance of having KO in promotion as retailer.

The results are demonstrated on the retailer Kaufland, but the project was done in Germany for all top retailers.

Calculations in the Cash Bill Promo

Example:

KO CSD 1,25L

The 1.25L bottle at Kaufland generates 372k trips in promotion, in a normal week with regular prices 126k trips.

Shopper Traffic (per week) in tsd

non promotion week
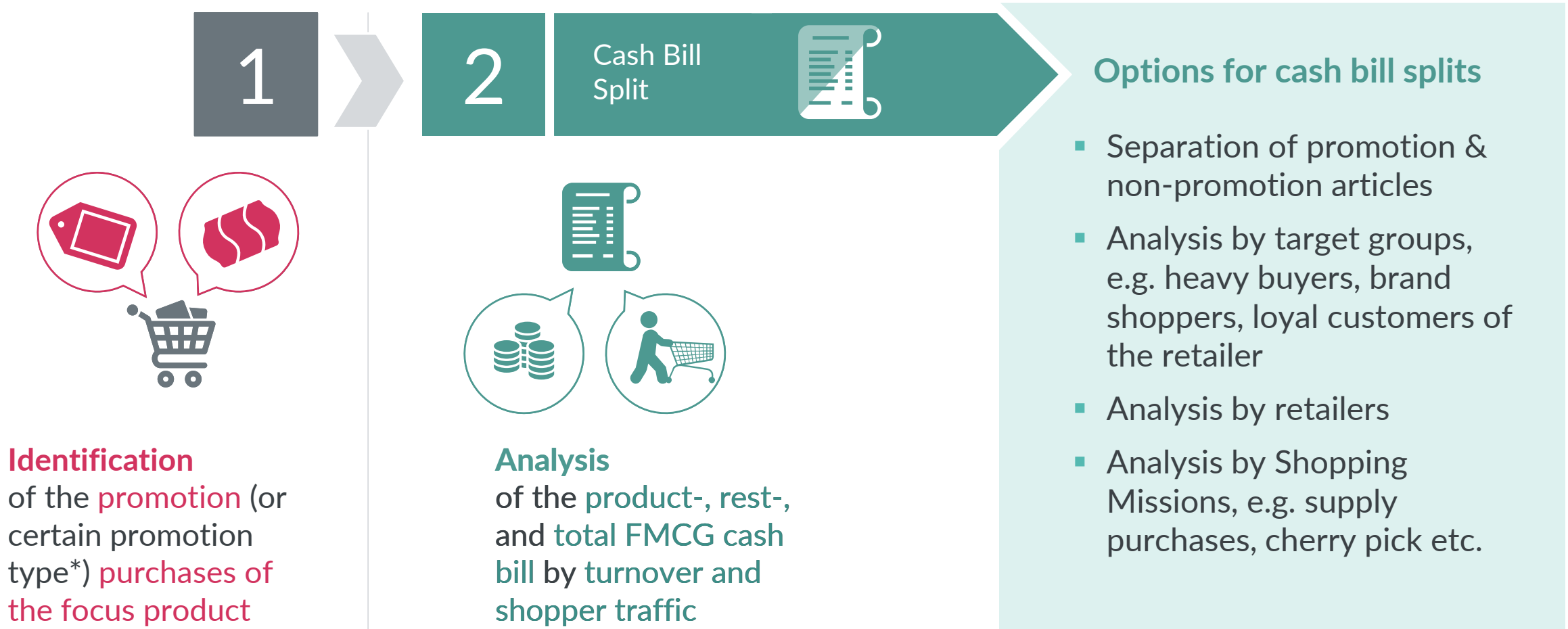**43 weeks**
126

+246

promotion week
8 weeks
372

Higher Shopper Traffic

Increase
246

Source: YouGov shopper | Germany | Cash Bill Promotion | MAT June 2023

Methodic Approach of the Cash Bill Promotion-Analysis

Defined focus products split into Promotion/ Non-Promotional bills

1

2 Cash Bill Split

Options for cash bill splits

- Separation of promotion & non-promotion articles

- Analysis by target groups, e.g. heavy buyers, brand shoppers, loyal customers of the retailer

- Analysis by retailers

- Analysis by Shopping Missions, e.g. supply purchases, cherry pick etc.

Identification
of the promotion (or certain promotion type*) purchases of the focus product

Analysis
of the product-, rest-, and total FMCG cash bill by turnover and shopper traffic

* Promotion Splits available: promoted price, coupon, promotional items, free packs

Calculations in the Cash Bill Promo

Derivation of Turnover Uplift (the Golden Bill)
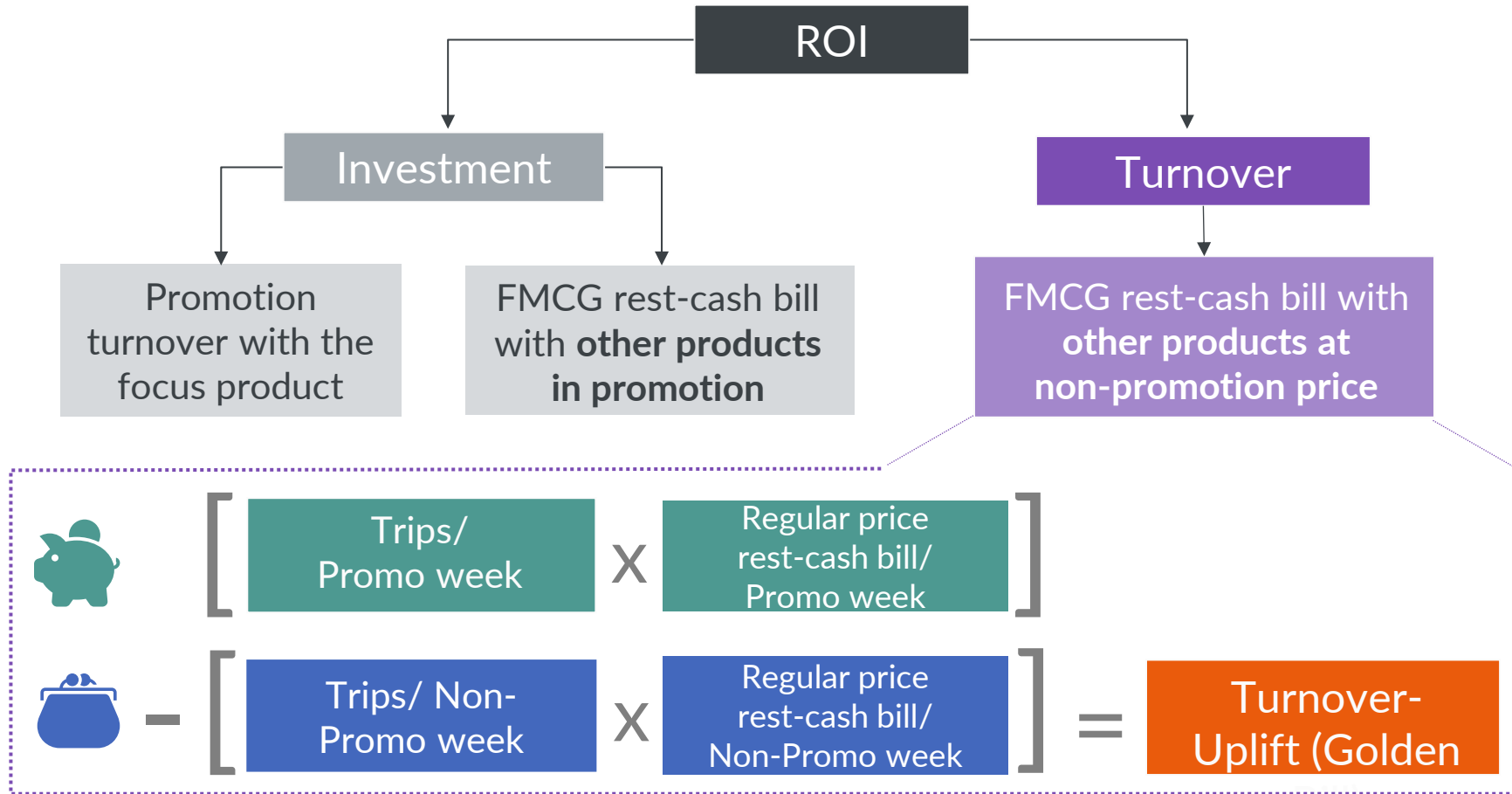
The higher the rest-cash bill turnover at regular prices, the higher the traffic uplift during promotion weeks, the more valuable is the promotion

ROI

Investment

Turnover

Promotion turnover with the focus product

FMCG rest-cash bill with **other products in promotion**

FMCG rest-cash bill with **other products at non-promotion price**

The higher the **rest-cash bill at regular (non-promotion) prices**, the higher is the retailer margin.

The product is even more valuable for the retailer if it generates **higher shopper traffic in promotion weeks** than in non-promotion weeks, activating more shoppers for the retailer.

$$\left[\frac{Trips/}{Promo\ week} \times \frac{Regular\ price}{rest\text{-}cash\ bill/}{Promo\ week} \right] - \left[\frac{Trips/\ Non\text{-}}{Promo\ week} \times \frac{Regular\ price}{rest\text{-}cash\ bill/}{Non\text{-}Promo\ week} \right] = Turnover\text{-}Uplift\ (Golden\ Bill)$$

Calculations in the Cash Bill Promo

Example:

KO CSD 1,25L

The 1.25L bottle at Kaufland generates 372k trips in promotion, in a normal week with regular prices 126k trips.

When a shopper buys the 1.25L in Kaufland at promotion price, he buys other FMCG products worth 36,52€ that are not on promotion = high-margin part of the rest cash bill
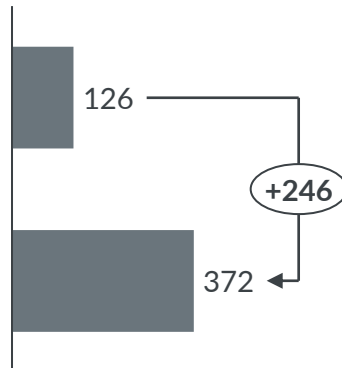
Shopper Traffic (per week) in tsd

✖

Rest cash bill at regular prices (in €)

═

Turnover at regular prices (per week in tsd €)

non promotion week
43 weeks
126

+246

promotion week
8 weeks
372

3,72	12,24	44,41	60,37

4,50 | 15,39 | 36,52 | 56,41

■ cash bill of the focus product
■ rest cash bill at promotion prices
■ rest cash bill at regular prices

Higher Shopper Traffic

Increase   246

Calculations in the Cash Bill Promo

Example:

KO CSD 1,25L

The 1.25L bottle at Kaufland generates 372k trips in promotion, in a normal week with regular prices 126k trips.

When a shopper buys the 1.25L in Kaufland at promotion price, he buys other FMCG products worth 36,52€ that are not on promotion = high-margin part of the rest cash bill

Shopper Traffic (per week) in tsd

✕

Rest cash bill at regular prices (in €)

═

Turnover at regular prices (per week in tsd €)

The best promotional items are those with a high traction = more traffic, but also valuable rest cash bills: both together contribute to the increase of the Golden Bill !!!
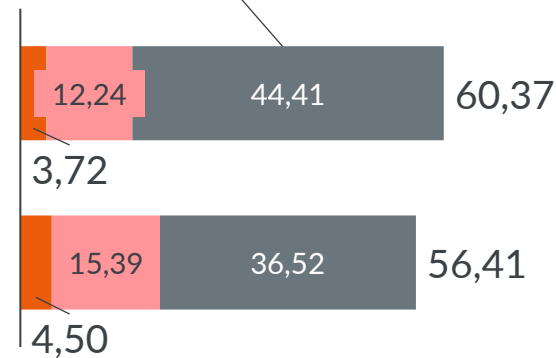
non promotion week
43 weeks
126

+246

promotion week
8 weeks
372

| | 12,24 | 44,41 | 60,37 |
3,72

| | 15,39 | 36,52 | 56,41 |
4,50

- cash bill of the focus product
- rest cash bill at promotion prices
- rest cash bill at regular prices

Higher Shopper Traffic

Higher rest cash bill turnover at regular prices

Increase 246

7.994

= „GOLDEN BILL"

This means 246k more trips in Kaufland - multiplied by the rest cash bill at normal price results in €7.9 million "Golden Bill"

In the frequency ranking at Kaufland, confectionery and food are strong, but KO 1.25 is top NARTD

Shopper Traffic for Promotion Weeks

Top 15 for...   Shopper Traffic (per week) in tsd

Product	Value
MILKA 81-100G	786
HARIBO GUMMIBEARS 175-200G	638
MUELLER YOGHURT WITH THE CORNER 140/150G	504
PRINGLES 190/200G	441
KO CSD 1,25L PET NR SINGLE BOTTLE	372
WAGNER STEINOFEN 320-385G/640G/700G	345
MAGGI FIX BAG	329
TEEKANNE HERBAL/FRUIT TEA 18/20 BAGS	325
KNORR FIX/NATURALLY DELICIOUS BAG	319
FUNNY FRISCH CHIPSFRISCH 175G	301
KO CSD 1,0L PET RR SINGLE BOTTLE	300
PFANNER ICETEA 2L CARTON	284
KERRYGOLD BUTTER 250G	273
COPPENRATH&WIESE OUR PIECES 280-540G	254
DANONE ACTIMEL DRINK 8/12PACK	248

....

Top total:

Top NARTD:

1,0l RR

1,25l NR

Source: YouGov shopper | Germany | Cash Bill Promotion | MAT June 2023 | *base: 60 selected products

Strongest uplifts of the shopper traffic have Wagner Pizza & Funny Frisch Chips

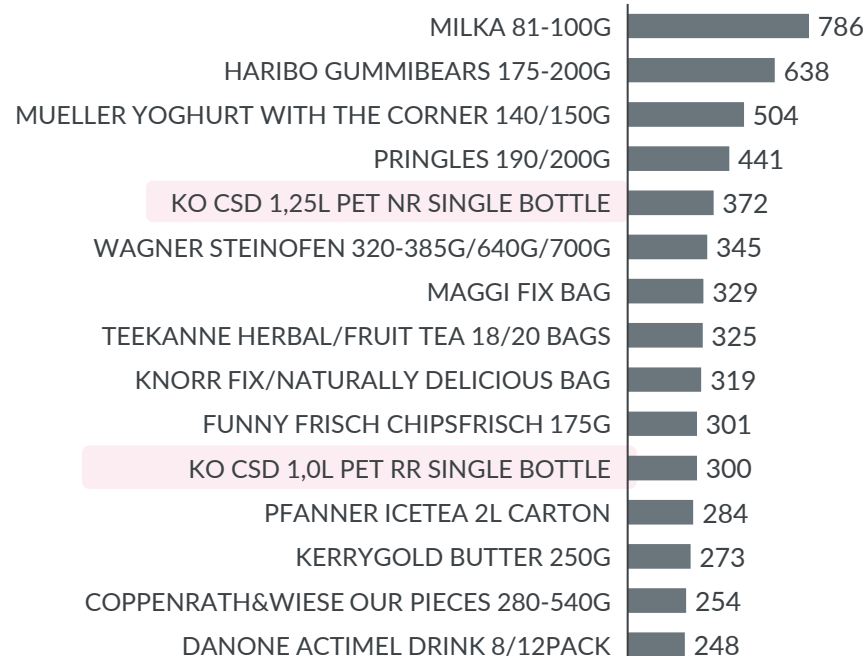## Shopper Traffic for Promotion Weeks

Kaufland

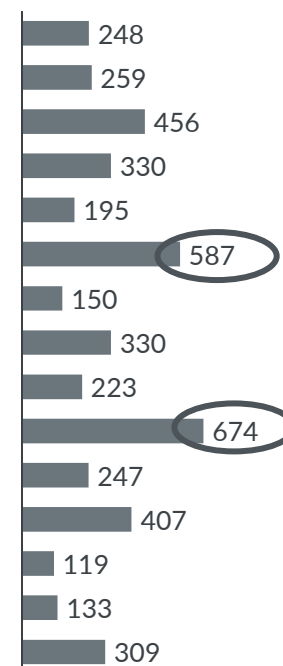Top 15 for…   Shopper Traffic (per week) in tsd   Uplift % vs. Non-promotion week

	Shopper Traffic	Uplift %
MILKA 81-100G	786	248
HARIBO GUMMIBEARS 175-200G	638	259
MUELLER YOGHURT WITH THE CORNER 140/150G	504	456
PRINGLES 190/200G	441	330
KO CSD 1,25L PET NR SINGLE BOTTLE	372	195
WAGNER STEINOFEN 320-385G/640G/700G	345	587
MAGGI FIX BAG	329	150
TEEKANNE HERBAL/FRUIT TEA 18/20 BAGS	325	330
KNORR FIX/NATURALLY DELICIOUS BAG	319	223
FUNNY FRISCH CHIPSFRISCH 175G	301	674
KO CSD 1,0L PET RR SINGLE BOTTLE	300	247
PFANNER ICETEA 2L CARTON	284	407
KERRYGOLD BUTTER 250G	273	119
COPPENRATH&WIESE OUR PIECES 280-540G	254	133
DANONE ACTIMEL DRINK 8/12PACK	248	309

….   ….

Top total:

Top NARTD:

1,0l RR   1,25l NR

The NARTD Golden Bill ranking is the same. Also ranked 1-4 in the overall ranking are the same, but then Wagner, Knorr and Pfanni Frisch are ahead of KO 1.25l NR, which is only in 8th place, KO 1.0l RR in 13th place, Pfanner in 14th place.

A different picture for the value of the cash bill: high product cash bill and valuable target groups drive this key figure
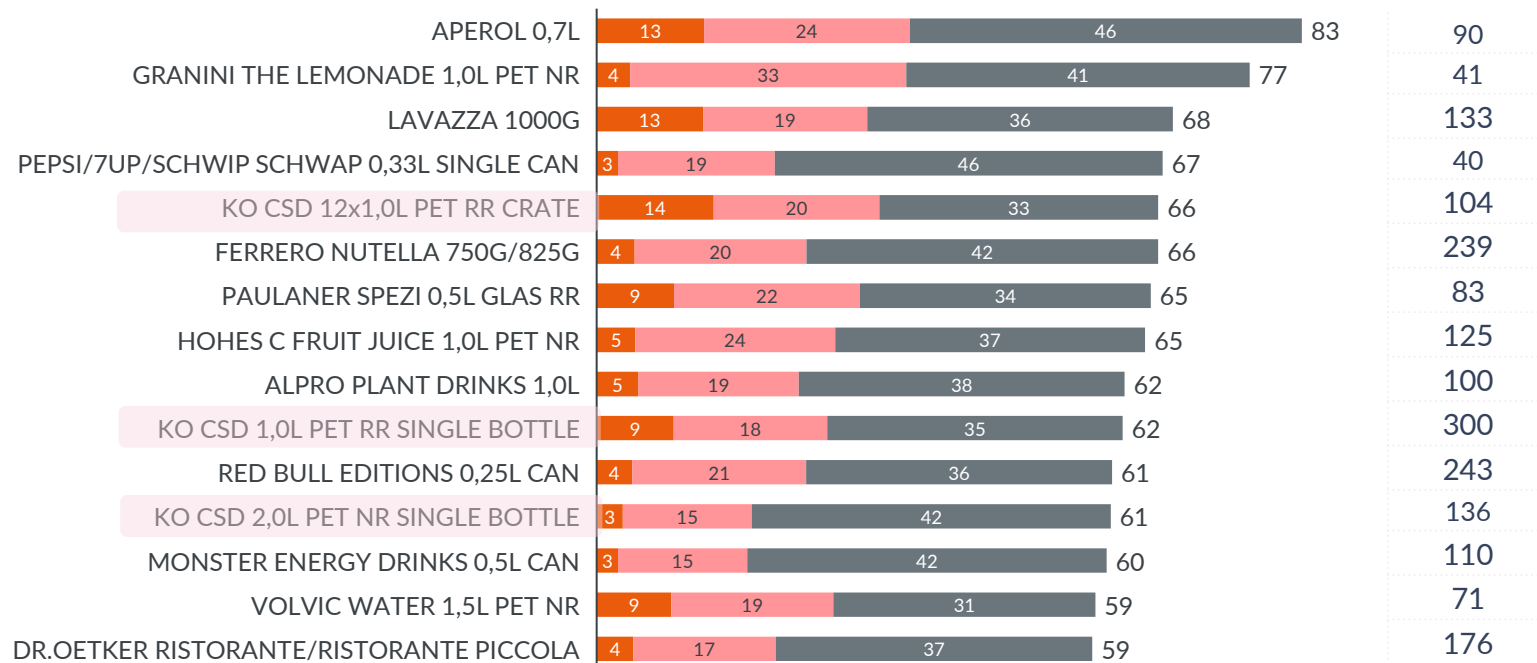
Cash Bill in Promotion Weeks

Top 15 for…   value of cash bill (€)

- cash bill of the focus product
- rest cash bill at promotion prices
- rest cash bill at regular prices

Trips in 1000

Product	focus	promo	regular	total	Trips in 1000
APEROL 0,7L	13	24	46	83	90
GRANINI THE LEMONADE 1,0L PET NR	4	33	41	77	41
LAVAZZA 1000G	13	19	36	68	133
PEPSI/7UP/SCHWIP SCHWAP 0,33L SINGLE CAN	3	19	46	67	40
KO CSD 12x1,0L PET RR CRATE	14	20	33	66	104
FERRERO NUTELLA 750G/825G	4	20	42	66	239
PAULANER SPEZI 0,5L GLAS RR	9	22	34	65	83
HOHES C FRUIT JUICE 1,0L PET NR	5	24	37	65	125
ALPRO PLANT DRINKS 1,0L	5	19	38	62	100
KO CSD 1,0L PET RR SINGLE BOTTLE	9	18	35	62	300
RED BULL EDITIONS 0,25L CAN	4	21	36	61	243
KO CSD 2,0L PET NR SINGLE BOTTLE	3	15	42	61	136
MONSTER ENERGY DRINKS 0,5L CAN	3	15	42	60	110
VOLVIC WATER 1,5L PET NR	9	19	31	59	71
DR.OETKER RISTORANTE/RISTORANTE PICCOLA	4	17	37	59	176

….

Top total*:

Top NARTD:

Source: YouGov shopper | Germany | Cash Bill Promotion | MAT June 2023 | *base: 60 selected products

Cash Bill Analysis (CBA)

Benefits

Specific insights	**Cash bill split**	**Objective and granular promotion coverage**	**Target group specific analyses**	**Consumer Panel approach**
Relevant Trips are ▪ specified by SKU ▪ separated by buyer group ▪ differentiated by retailers ▪ related to the chosen benchmark	▪ Detailed cash bill analysis by categories, segments, products… ▪ customized to the concrete business issue	▪ Integration of YouGov promotion information, and thus ▪ objective classification of promotions ▪ analysis by promotion types such as coupons, free packs, promoted price, discount	▪ Analysis of combination purchases of individual target groups in focus, e.g. target groups defined by retailer or category affinity	▪ Big sample size ▪ High data quality ▪ High detail grade regarding the analysis of the cash bill ▪ Tracking option, e.g. subsequent to listing or promotion changes

Cash Bill "Promo" Analysis

Understanding the value of promotion shopping trips

Business questions

The evaluation of promotion success must consider - beyond the pure sales uplift - **the overall value of the promotion trip**:

- Does the retailer benefit because shoppers leave in total more money in the shop, when buying a brand in promotion?

- Does the promotion activate more shoppers to come to the store?

Research approach

The Cash Bill "Promo" analyses the cash bills of promotion purchases vs. non-promo purchases:

- It breaks down the total promo cash bills and analyses their value in relation to regular shopping weeks as well as matching reference products.

- Benchmarks allow the comparison of different promotion types, brand competitors or retailers.

Benefits

- Cash Bill "Promo" Analysis supports a **fact-based promotional dialogue with retailers** by demonstrating the contribution of brand's promotion to the success
  of the retailer, thus going beyond direct revenue

- Depending on the outcome, the results can be used to argue **pro or contra further promos**

- The big sample size of our consumer panel provides **high reliability** and high detail regarding the analysis of the cash bill
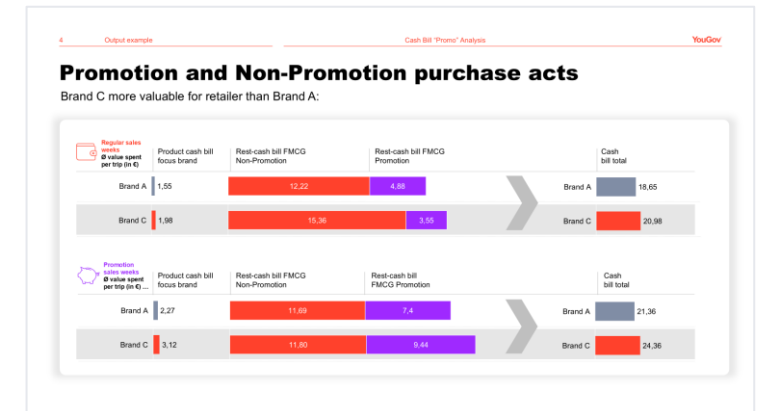
Outcome

The essential KPI's for the value of promotion trips:

- **Uplifts in promotion weeks** (turnover & shopper traffic) Those brands and products are identified that are most attractive for promotions.

- **Cash bill value** (focus product in promo vs. non-promo + rest-cash bill)

- **Promo share of rest-cash bill** (the higher the rest-cash bill at regular prices, the higher is the retailer margin - *optional*)
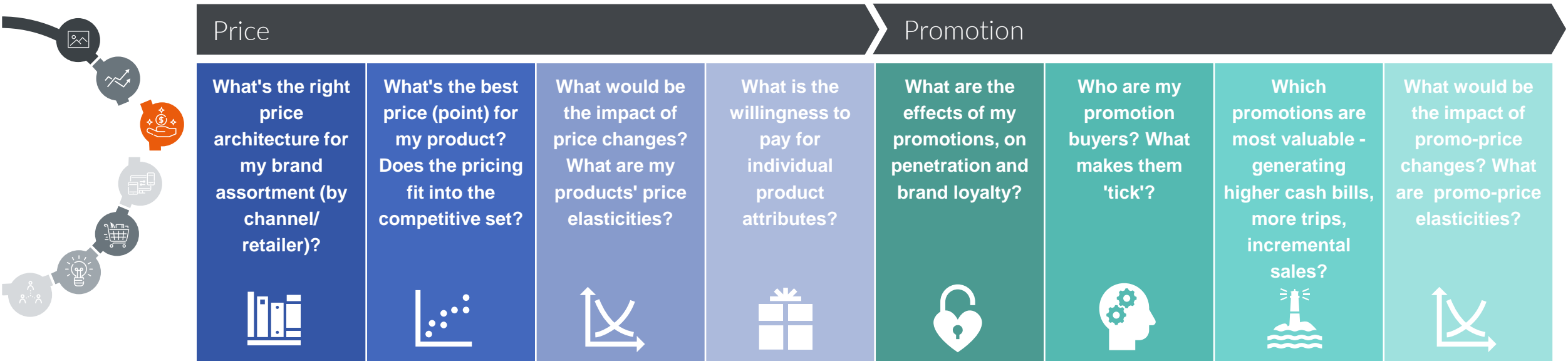
Output examples

Price & Promotion Management

Typical questions that we answer

Price				Promotion			
What's the right price architecture for my brand assortment (by channel/ retailer)?	What's the best price (point) for my product? Does the pricing fit into the competitive set?	What would be the impact of price changes? What are my products' price elasticities?	What is the willingness to pay for individual product attributes?	What are the effects of my promotions, on penetration and brand loyalty?	Who are my promotion buyers? What makes them 'tick'?	Which promotions are most valuable - generating higher cash bills, more trips, incremental sales?	What would be the impact of promo-price changes? What are promo-price elasticities?

Focus today:

Promotion Evaluator
Assessing „Brand Promotion Health"
by classifying promotion purchases

02

Promotion Evaluator (PEV)

Assessing „Brand Promotion Health"
by classifying promotion purchases

Case Study #4
Promotion Evaluator

Evaluation of the Fanta Promotions

The Promotion Evaluator study for Fanta in Romania focuses on analysing how Fanta's promotions contribute to brand building and brand loyalty.

It shows to what extent the promotions sustainably attract new brand buyers and generate short-term profits from bargain hunters.

The "health" of the promotion business is analysed in a competitive comparison with Mirinda and differences among lower-income households are highlighted.

Source photo: https://www.retail-fmcg.ro/fmcg/fanta-un-nou-design.html, 26/06/2024

Methodology of the Promotion Evaluator:

Categorization of conceivable pre- and post promotion purchases

pre purchase act:	Approach:	post purchase act:

Where is the buyer coming from?

Where is the buyer going to?
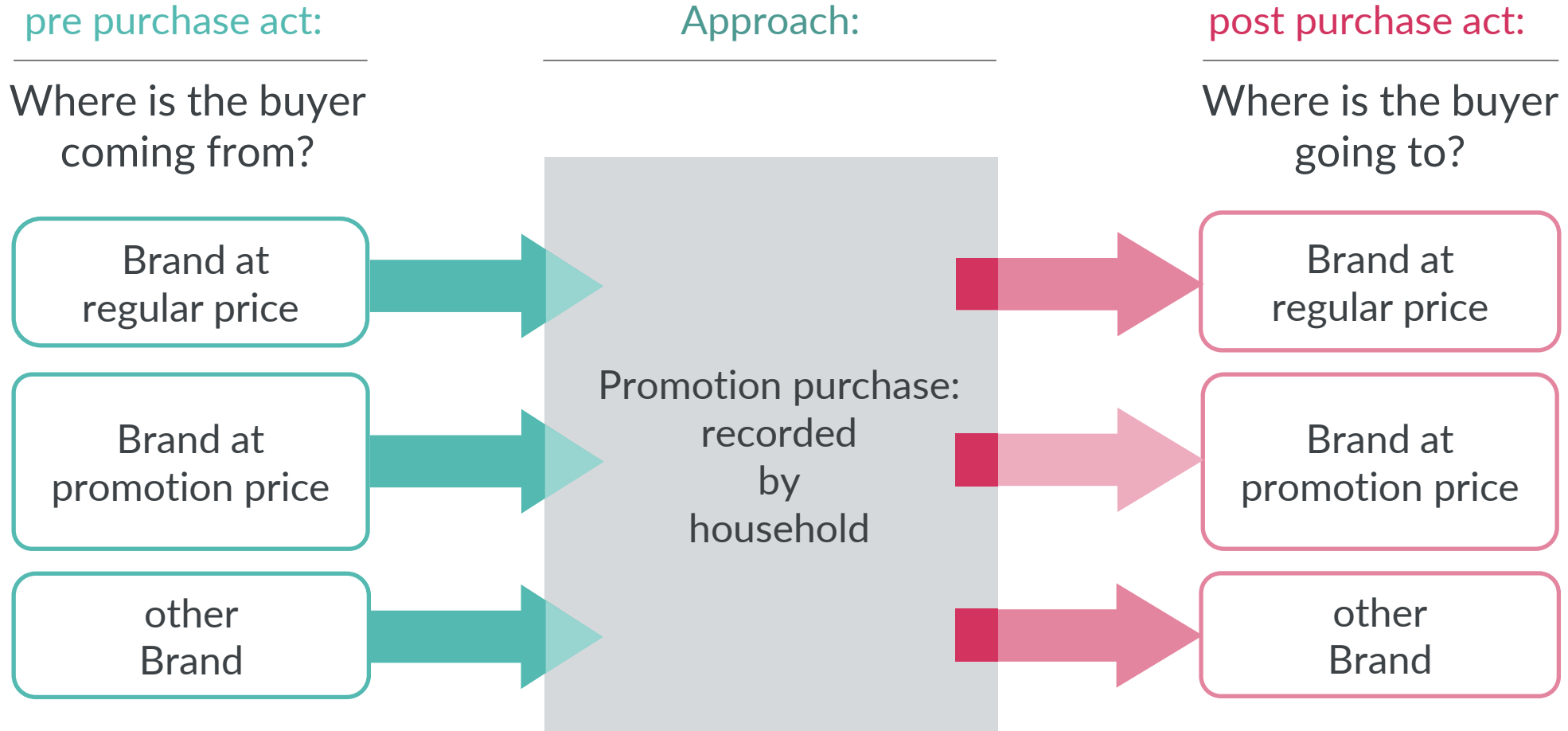
Methodology of the Promotion Evaluator:

Qualitative classification of pre- and post promotion purchase acts
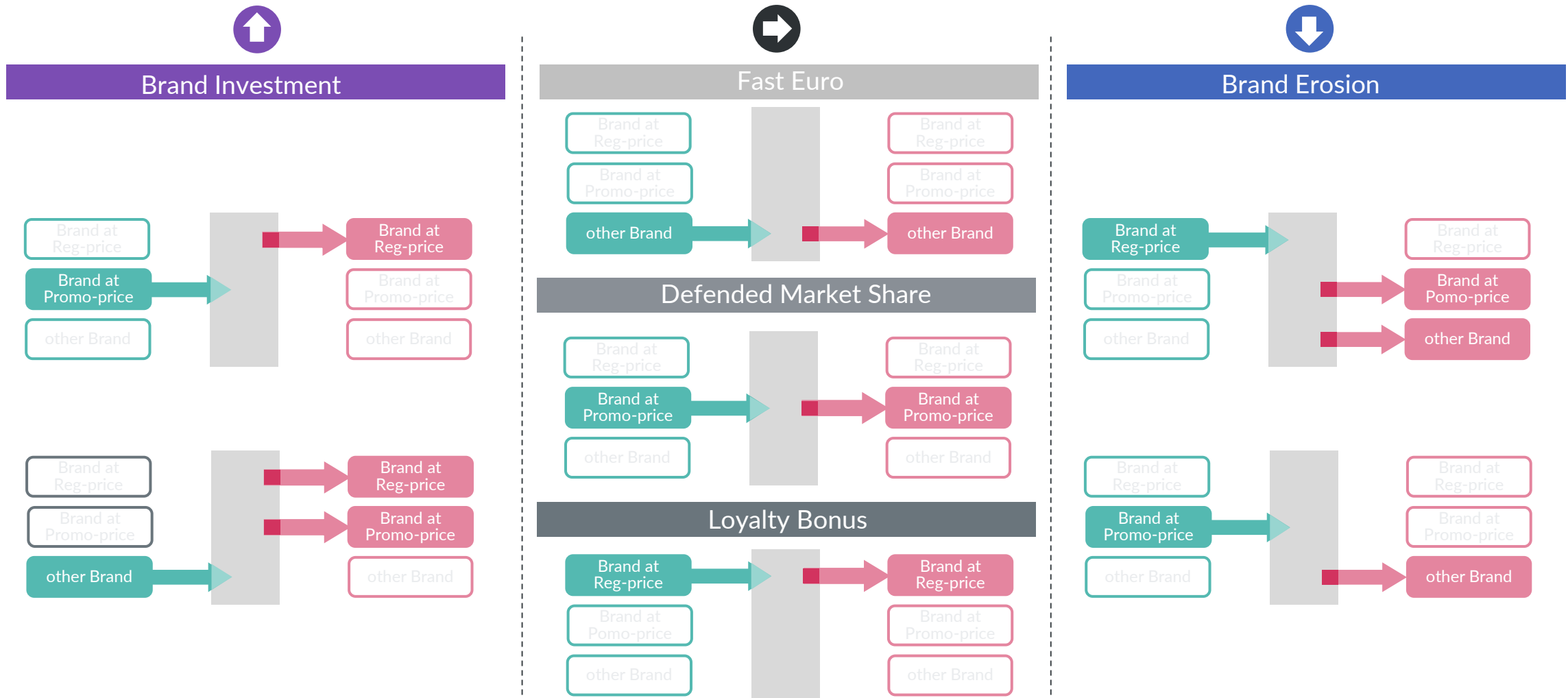
Methodology of the Promotion Evaluator:

How did the promotion work (in %)?
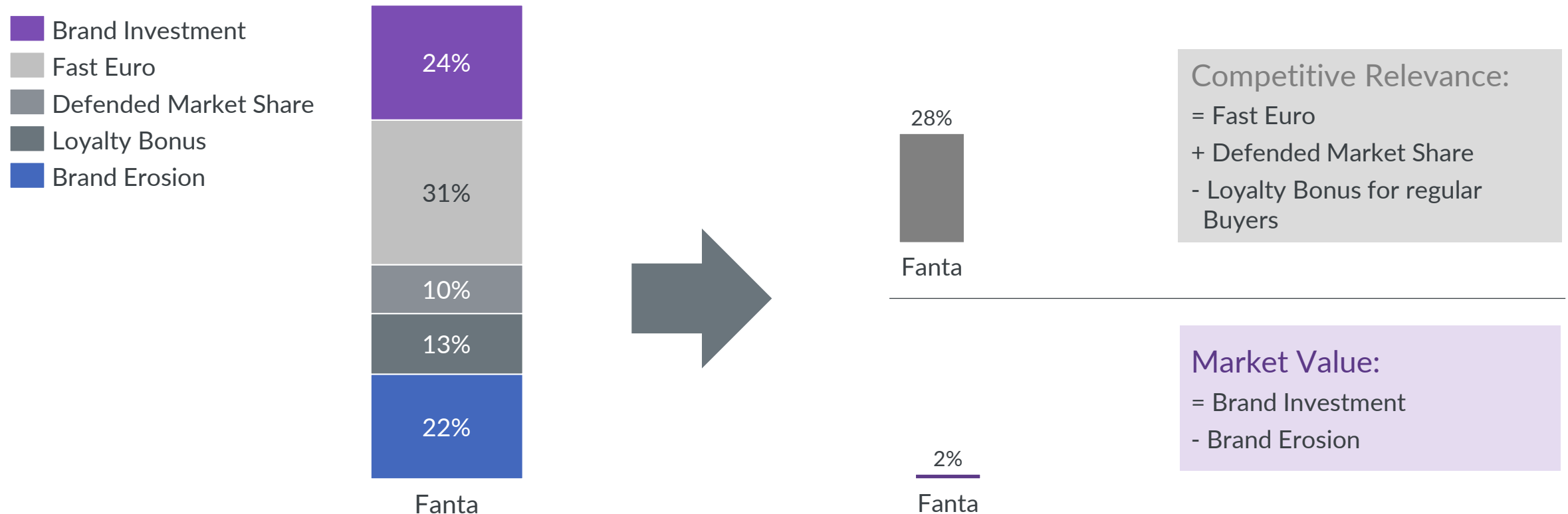
How much of generated promotion sales can be attributed to…

% of all promotion purchases

⬆ … a sustainable win of new brand buyers?

34,8

Brand-Investment
buyers keep on buying the brand afterwards

➡ … short-term wins from the competition?

20,2

Fast Euro
buyers purchase the brand in promotion only, apart from that, competitor brands

… defended market share?

18,1

Defended Market Share
buyers who purchase the brand always in promotion

… waste of money?

14,5

Loyalty Bonus for Regular Buyers
buyers who regularly purchase the brand at regular price

⬇ … brand damage?

12,5

Brand Erosion
buyers who stop buying the brand (at regular price)

Gaining buyers dominates Fanta´s promotion business with higher Brand Investment relative to Erosion and in the Fast Euro

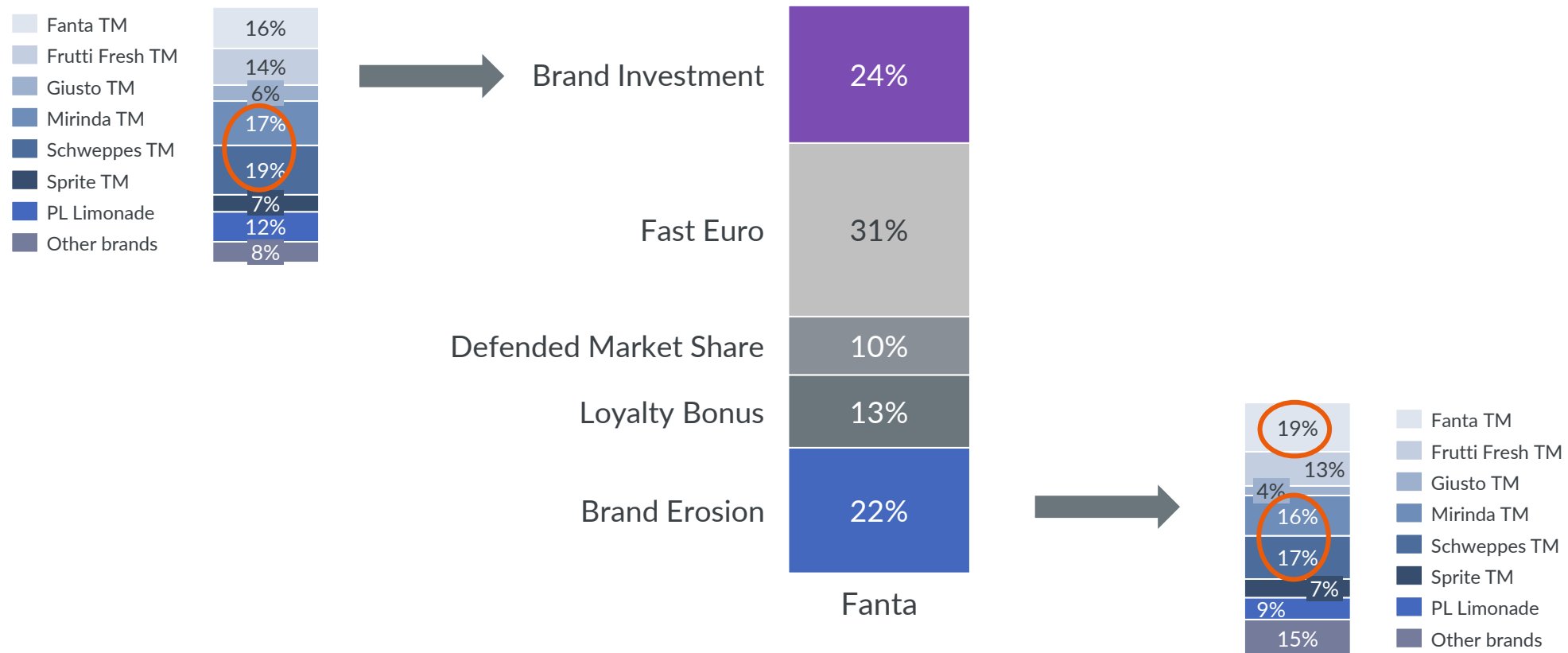## Classification of purchase acts in %

Fanta promotion business can generate more trips from new buyers than losing buyers!

Legend:
- Brand Investment
- Fast Euro
- Defended Market Share
- Loyalty Bonus
- Brand Erosion

Fanta stacked bar:
- 24%
- 31%
- 10%
- 13%
- 22%

Fanta

28%
Fanta

2%
Fanta

Competitive Relevance:
= Fast Euro
+ Defended Market Share
- Loyalty Bonus for regular Buyers

Market Value:
= Brand Investment
- Brand Erosion

Source: YouGov shopper | Romania | Lemonade | FY 2023 | Trips in %

High proportion of new buyers of Mirinda & Schweppes, but also erosion towards these

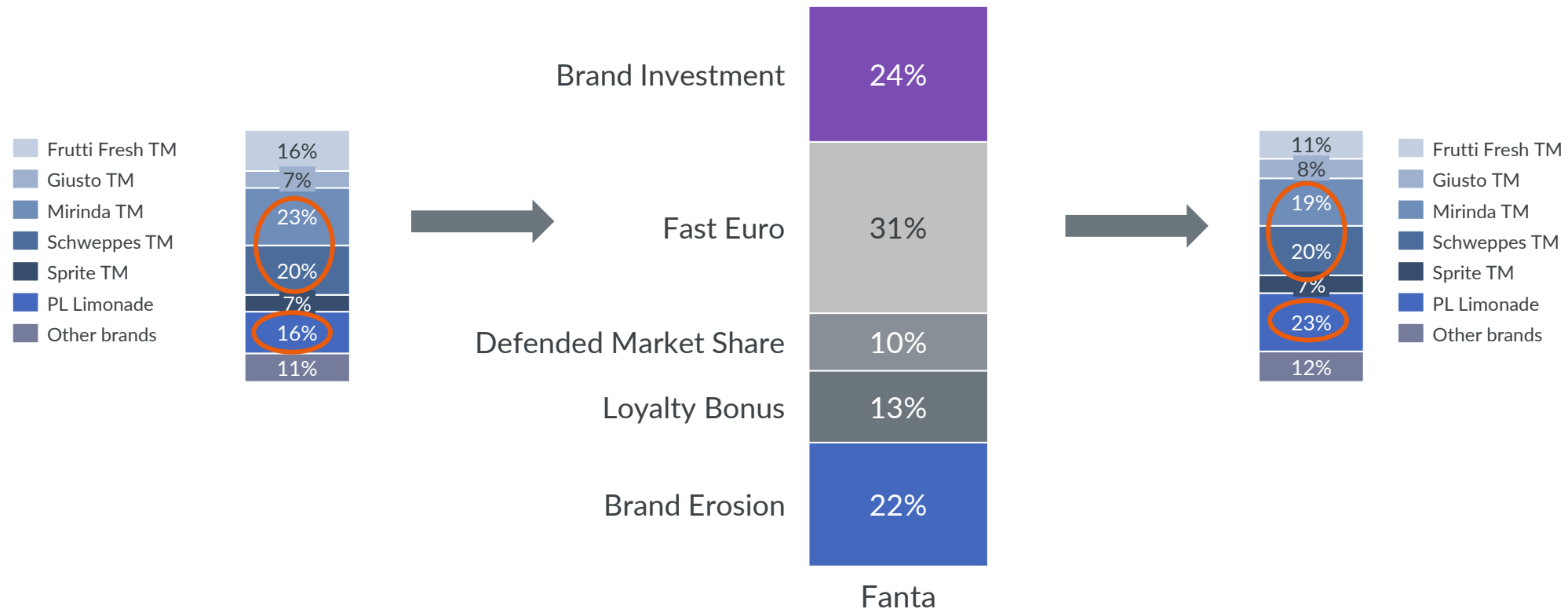Classification of purchase acts in %

Fanta promotion business can generate more trips from new buyers than losing buyers!

Fanta´s promotions upgrade trips of Private Label buyers!
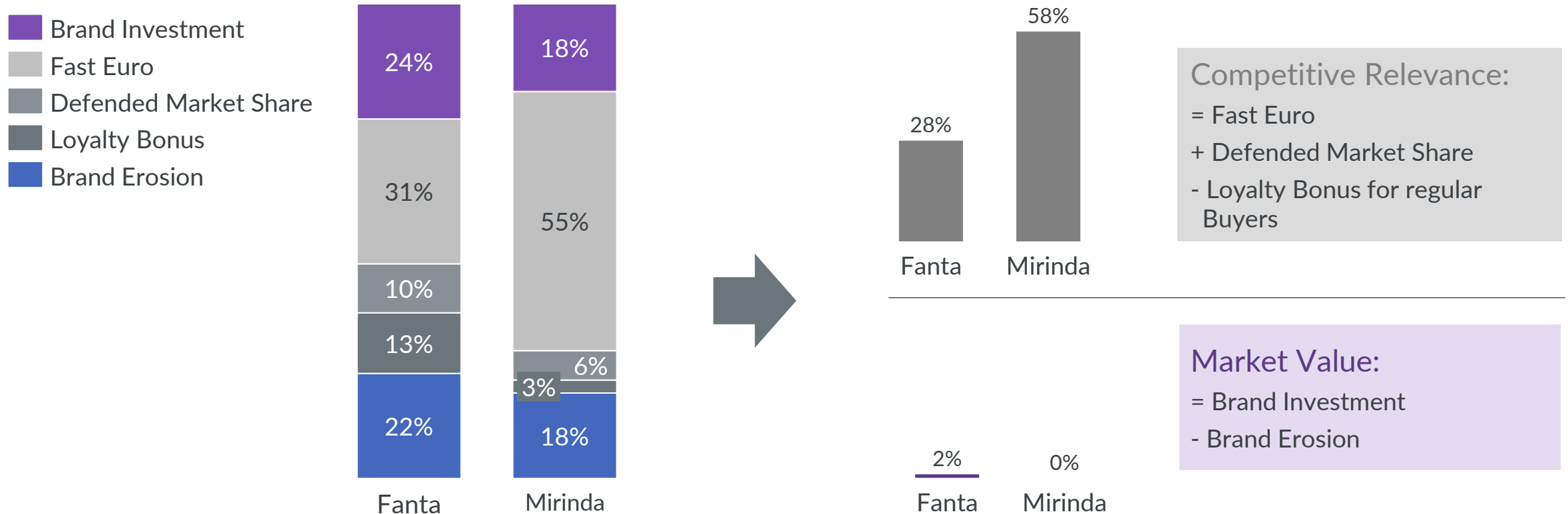
Classification of purchase acts in %

Buyers that come for the promotion and don´t stay come mainly from Mirinda and Schweppes, but also from Private Label!

Brand Investment	24%
Fast Euro	31%
Defended Market Share	10%
Loyalty Bonus	13%
Brand Erosion	22%

Fanta

Left bar legend and values:
- Frutti Fresh TM — 16%
- Giusto TM — 7%
- Mirinda TM — 23%
- Schweppes TM — 20%
- Sprite TM — 7%
- PL Limonade — 16%
- Other brands — 11%

Right bar legend and values:
- 11% — Frutti Fresh TM
- 8% — Giusto TM
- 19% — Mirinda TM
- 20% — Schweppes TM
- 7% — Sprite TM
- 23% — PL Limonade
- 12% — Other brands

Source: YouGov shopper | Romania | Lemonade | FY 2023 | Trips in %

Mirinda´s promotion business are focused on Fast Euro

Classification of purchase acts in %

Mirinda is not attracting any new buyers with promotions. In the Fast Euro, they also benefit from Fanta buyers, but they went back to Fanta afterwards!
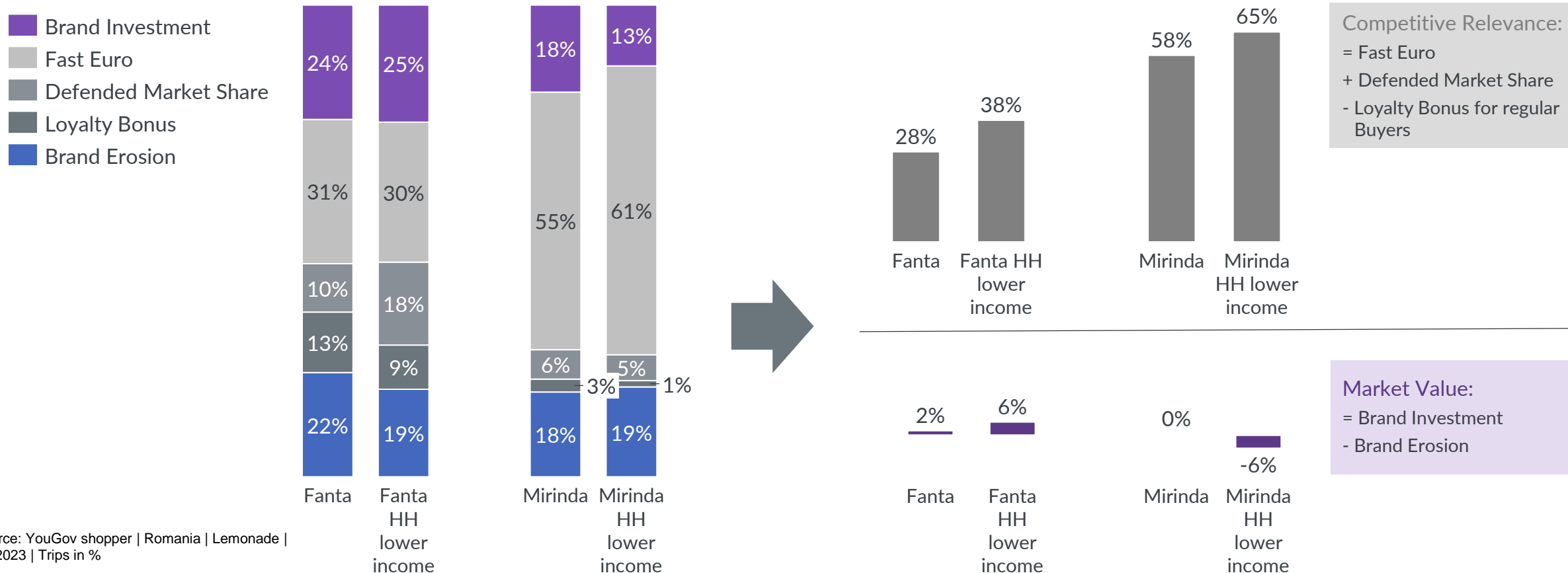

- Brand Investment
- Fast Euro
- Defended Market Share
- Loyalty Bonus
- Brand Erosion

Fanta
- 24%
- 31%
- 10%
- 13%
- 22%

Mirinda
- 18%
- 55%
- 3%
- 6%
- 18%

Competitive Relevance:
= Fast Euro
+ Defended Market Share
- Loyalty Bonus for regular Buyers

Fanta 28%   Mirinda 58%

Market Value:
= Brand Investment
- Brand Erosion

Fanta 2%   Mirinda 0%

Fanta´s promotions are even more succesful for lower-income households: trips can be won from new buyers!

Classification of purchase acts in %

Mirinda's promotions cannot keep lower-income households loyal to the brand, unlike Fanta

Share of Trips on Brand Total   100%   38%   100%   25%

Legend:
- Brand Investment
- Fast Euro
- Defended Market Share
- Loyalty Bonus
- Brand Erosion

Fanta: 24%, 31%, 10%, 13%, 22%
Fanta HH lower income: 25%, 30%, 18%, 9%, 19%
Mirinda: 18%, 55%, 6%, 3%, 18%
Mirinda HH lower income: 13%, 61%, 5%, 1%, 19%

Competitive Relevance:
= Fast Euro
+ Defended Market Share
- Loyalty Bonus for regular Buyers

Fanta: 28%
Fanta HH lower income: 38%
Mirinda: 58%
Mirinda HH lower income: 65%

Market Value:
= Brand Investment
- Brand Erosion

Fanta: 2%
Fanta HH lower income: 6%
Mirinda: 0%
Mirinda HH lower income: -6%

Source: YouGov shopper | Romania | Lemonade | FY 2023 | Trips in %

Benefits of the Promotion Evaluator

Insights into the effects of promotions behind uplifts!

Assessment of Promotion Sustainability

Qualitative evaluation of brand promotion health by analysing and classifying pre- and post-promotion purchase acts.
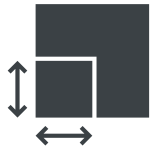
Broad and detailed View

Promotion Sustainability can be checked for total brand view as well as with regard to specific retailers or particular promotion mechanics.

The connection with buyer characteristics allows further evaluation.

Comprehensive Benchmarking

Results are related to competitors as well as other categories in a comprehensive benchmark.

Promotion Evaluator

Assessing „Brand Promotion Health" by classifying promotion purchases

Business questions

How sustainable are my brand promotions or particular promotion mechanics?

- How "healthy" are my promotions compared to the competition?

- Among which buyer groups is the promotion particularly successful?

- Which buyers leave the brand and how can they be characterized?

Research approach

Qualitative evaluation by analysing and classifying pre- and post-promotion purchase acts:

- **Brand Investment** (gaining buyers)

- **Fast Euro** (just temporary buyers)

- **Defended Market Share** (catching bargain hunters)

- **Loyalty Bonus** (rewarding loyal buyers)

- **Brand Erosion** (losing buyers

Benefits

A useful and pragmatic approach for the evaluation of the sustainability of promotions or specific promotion mechanisms

- Broad as well as detailed view: total brand view as well as analyses of specific accounts or particular mechanics or link with buyer characteristics possible

- Comprehensive benchmarking: comparison with promotions of competitors and the category allows a comprehensive evaluation

Outcome

- **Classification of promotion purchase acts in %** shows to what extent the generated promotion sales can be attributed to **win new brand buyers**, to **generate short-term wins** from competitors, or to **'spoil' brand buyers** to bargain hunters.

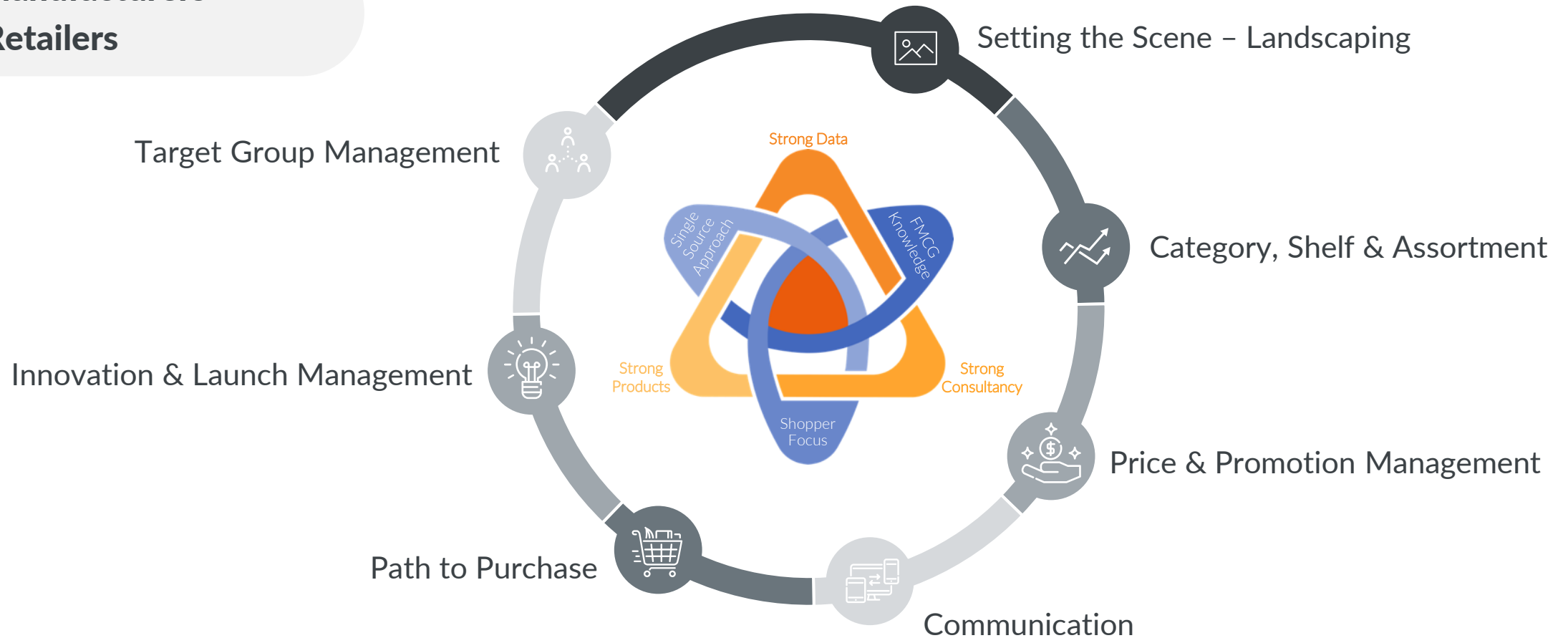- Optional module 'Promotion Profile' supports diagnoses by analysing buyer characteristics of promotion clusters

Output examples
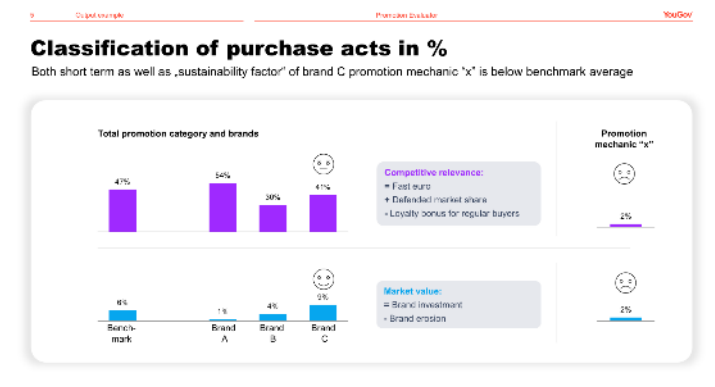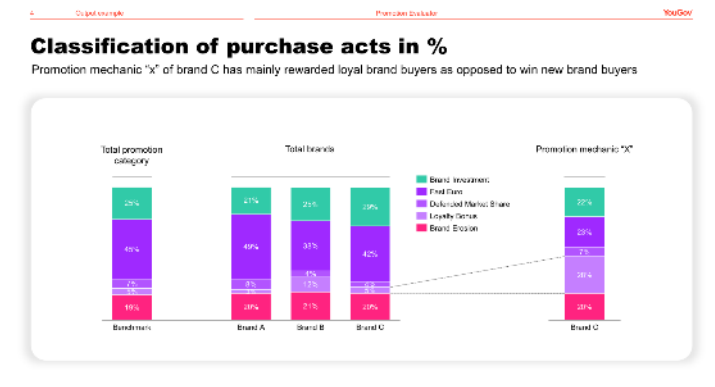
3 Further Training Material and Q&A

Further training material and information are available for every core area

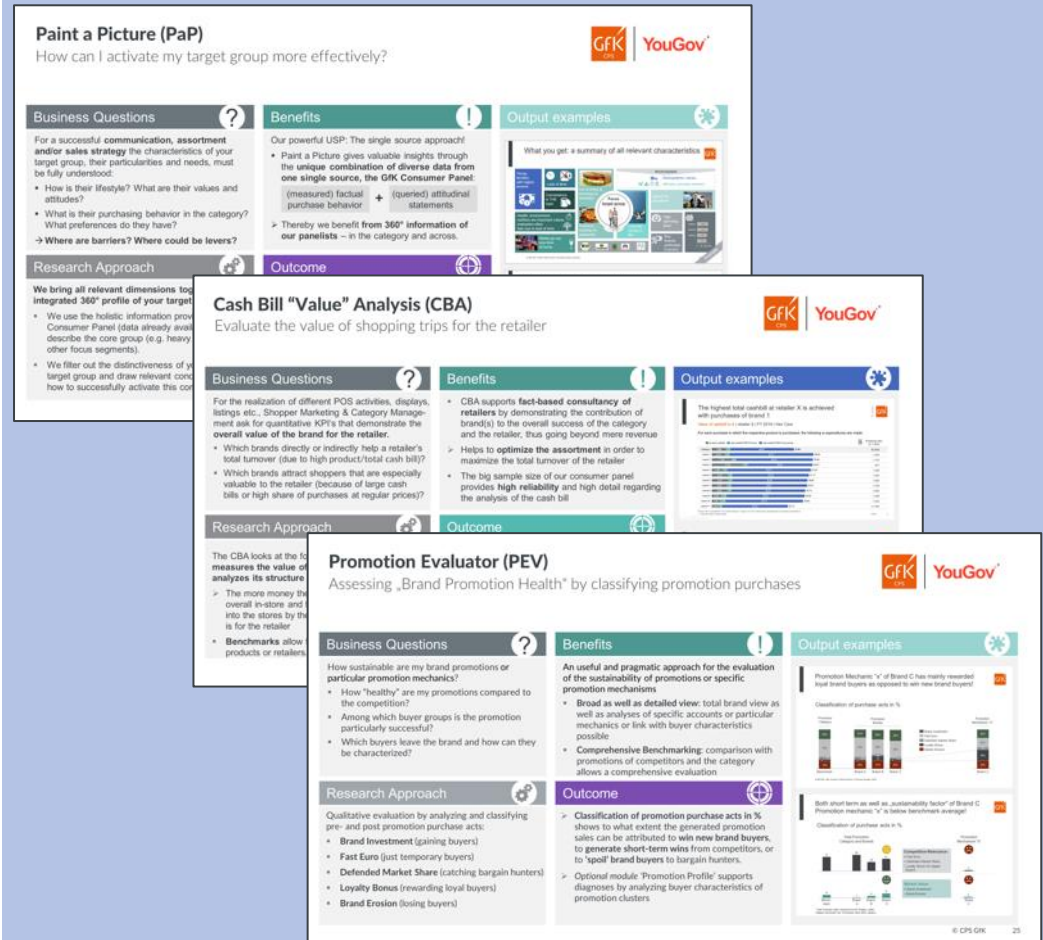**For Manufacturers and Retailers**

Access to all topics in a comprehensive deck

Comprehensive overview deck including all topics and possible solutions to answer the business questions

One pagers for every solution providing for every solution: answered business questions, approach, benefit and output in a nutshell

Give us your questions and briefings, we consult you!

Our Coca-Cola account team: A strong experienced team!

Feel free to address any of us directly!

DK: Peter Palmquist
peter.palmqvist@yougov.com

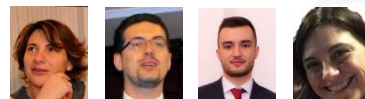SE: Oskar Danielson
oscar.danielson@yougov.com

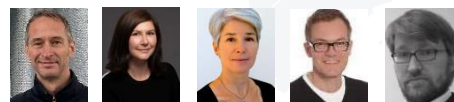NL: Ilse van Velden and the team
Ilse.van.Velden@yougov.com

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karel.deridder@yougov.com

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Thank you!

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