YouGov Shopper Intelligence

Solutions overview

YouGov Shopper intelligence for Coca-Cola
03/2025

YouGov Consumer Panels

We measure shoppers. Broadly. Deeply.

107.000 households

85 shopper KPIs

365 days per year

16 countries

17 Mio purchase acts

≙ 32 trillion in total population!

2.1 Mio SKUs

1.350 retailers

Shopper insights across borders

YouGov Shopper Intelligence in 16 countries

- Austria
- Belgium
- Bulgaria
- Croatia
- Czech Republic
- Denmark
- Germany
- Hungary

- Italy
- Poland
- Romania
- Serbia
- Slovakia
- Sweden
- The Netherlands
- Ukraine

Plus announcements …

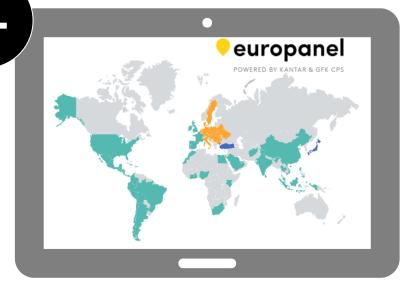CPS Press Blog | English (gfk-cps.com)

YouGov Shopper Norway expansion

Switzerland panel launch and Germany expansion
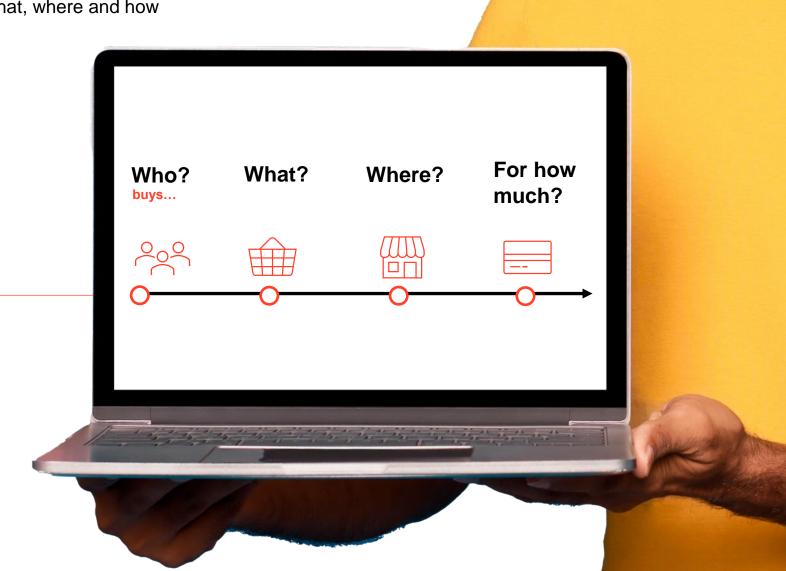
YouGov Shopper panel expansion in Denmark

NEW !

+

Access to the world via cooperation with Europanel

europanel
POWERED BY KANTAR & GFK CPS

What is YouGov Shopper Panel?

A continuous purchase reporting, answering who, what, where and how

YouGov Shopper Panel is a representative sample of shoppers whose shopping habits are reported and registered regularly over a period of time.
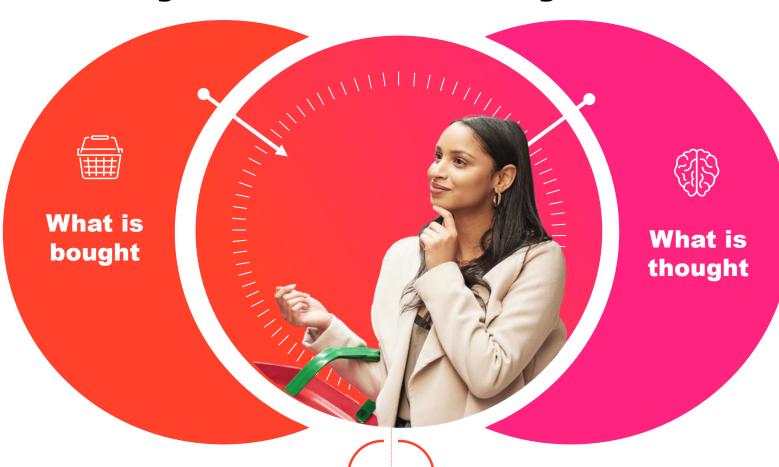
Who?
buys...

What?

Where?

For how much?

Reveal the 'why' behind the 'buy'

Observing shopping behaviour over time with comprehensive scope

▼

Our purchase data reveals:
- patterns
- switching
- trends
- predictions

What is bought

What is thought

Complete 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 | Individual panellists deep-dives | Customized ad hoc research (Qual & Quant) |

We own a comprehensive statement set

Available at the touch of a button

Identify & define any target group on measured data

Lifestyle &
Living Situation

Purchasing Routines
& Preferences

General Product
Preferences

Personal Attitudes &
Values

Important Features for
Retailer Choice

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

Nutrition/
Health/ Diet

Cooking &
Eating Habits

Media Usage
Behaviour
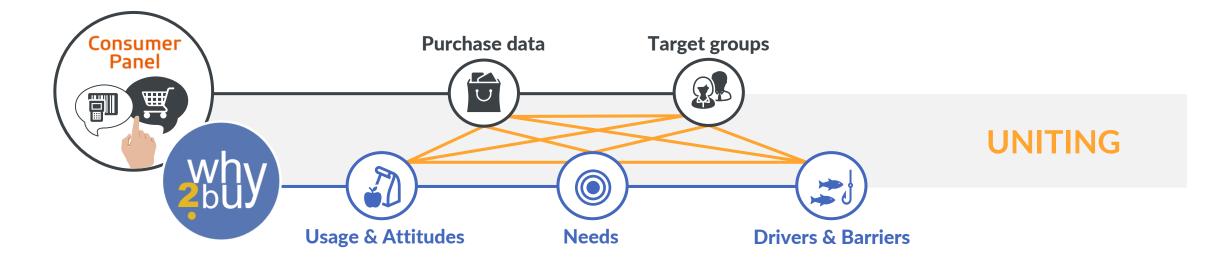
Environment/ Bio/
Sustainability

Why2buy offers individual panel deep-dives
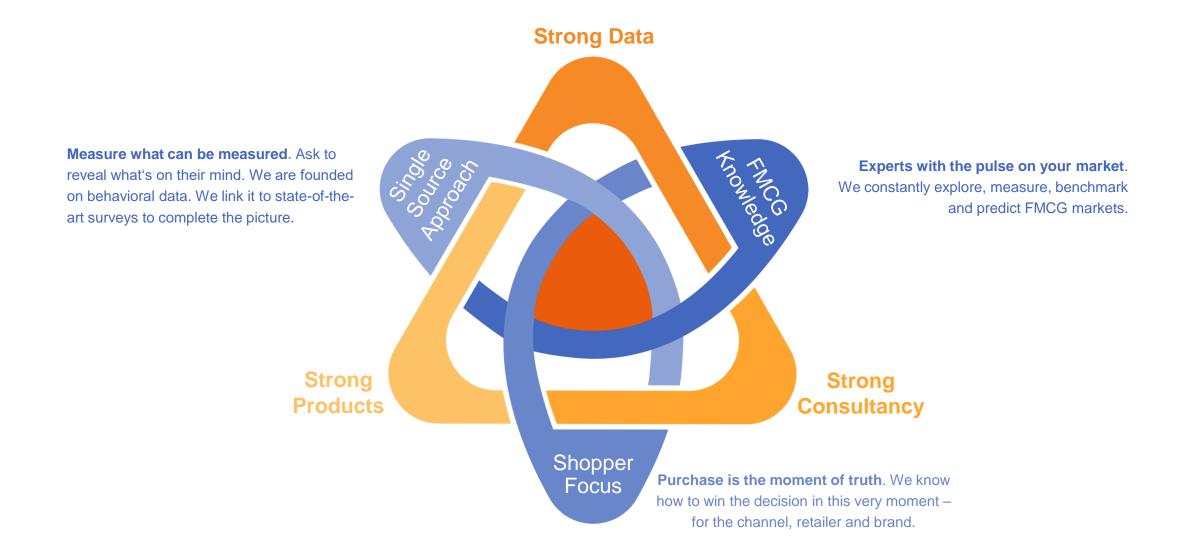
To receive tailor made answers to your questions

- Reach **any target group** based on factual behavior
- **Survey directly** into Consumer Panel
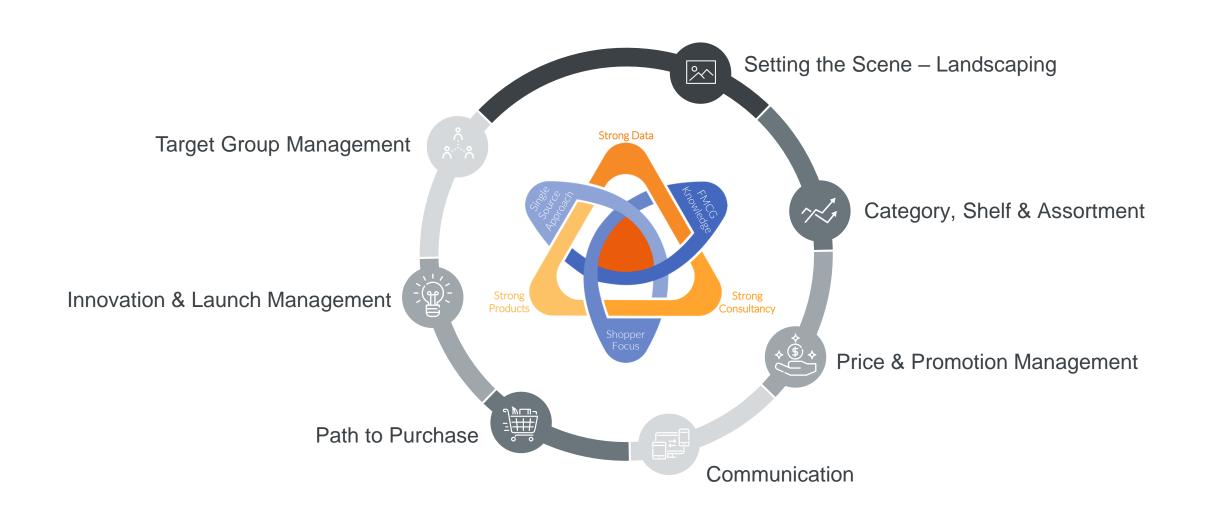- **Customized** to your questions
- Link survey insights to **purchase KPIs**
- Get **single source** united results

Consumer Panel

Purchase data

Target groups

UNITING

Usage & Attitudes

Needs

Drivers & Barriers

We offer fact-based solutions — fully dedicated to FMCG

YouGov

Strong Data

Single Source Approach

FMCG Knowledge

Strong Products

Strong Consultancy

Shopper Focus

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.

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

We focus on the core areas of FMCG - Marketing, Category Management and Sales

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

Setting the Scene – Landscaping

YouGov

Category Diagnostics		My Brand and My Market				How to Grow		
How does my market 'tick'? What are the characteristics, patterns and 'laws' of my category?	Which trends and dynamics are happening in & across my category? How relevant are they for me?	How strong and relevant is my brand, my product?	How does my market develop over time and what's the impact on my brand?	What is my source of business? To whom do I lose, from whom do I gain?	How am I performing in my competitive set? How is my brand positioned?	What are my strengths and weaknesses? What are my assets? Where are my risks & potentials?	At which retailer do I (still) have potential? What's the value of my brand for the retailer?	Where are white spots and opportunities in & across categories?

1. Shopper KPIs for category & across	4. Macroeconomic trends	8. Shopper KPIs	9. Shopper KPIs over time	10. Gain & Loss	12. Shopper KPIs	17. Loyalty Analysis	26. CM KPIs (SimIT)	30. New Launch Tracker
2. Relevance of promo, retailers, demographics, target groups like HML, ...	5. Market/category report incl. brands, retailers, promo, price level...			11. New/ Lost/ Retained	13. Duplication	18. New/Lost/ Retained	27. Cash Bill Value	31. Segmentation
3. Category Diagnostic Dashboard (CIV)	6. Gain & Loss				14. Buyer Overlap	19. Penetration Growth Driver (PGD)	28. Retailer Perception Report	32. Product Affinity Map
	7. Trial & Repeat Tracker				15. Product Affinity Map	20. Heavy/Medium/ Light	29. Shopping Missions	33. Category Purchase Tree
					16. CM KPIs (SimIT) across channels	21. Most Valuable Consumers		34. Shopping Missions
						22. Analysis of exclusive buyers		35. Shopping Occasions
						23. Why2Buy		
						24. Segmentation		
						25. Category Purchase Driver		

Category, Shelf & Assortment

YouGov

Category (Diagnostics)			Shelf (Management)		Assortment (Optimization)		
What is the role of the category? How relevant is it for the different retailers?	**How is the category structured? Which segments belong to it? Where is my position?**	**How does the shopper decide? On which criteria? What is the shoppers' decision tree?**	**How does the shopper navigate at the shelf? How are products found & chosen?**	**What is the most effective shelf-layout?**	**How does the category assortment drive purchase? How strong is this lever?**	**What's the best assortment for the category/ channel/ retailer? Where are white spots?**	**What's the impact of potential assortment changes (listing/delisting)?**

1. CM KPIs (SimIT)

2. Purchase Affinity Map
3. Category Perception Workshop

4. Category Perception Workshop
5. Purchase Decision Tree
6. Category Purchase Tree

7. (Qualitative) shop-alongs, in combination with Eyetracking, if required
8. Virtual Shelf Test

9. Virtual Shelf Planogram test

10. CM KPIs (SimIT)
11. Category Purchase Driver

12. Assortment Optimization
13. Market Share Simulator (Product Added Value)
14. Category Purchase Tree
15. (Shelf-based) Conjoint
16. Virtual Shelf Test

17. Assortment Optimization
18. Listing Impact Simulator (Listing)
19. Price Performance Planner
20. Market Share Simulator (for Delisting)
21. (Shelf-based) Conjoint

Price & Promotion Management

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?**
1. (Shelf-based) Conjoint/ Virtual Shelf Test 2. Product Affinity Map 3. Price Frequency Analysis	4. Price Awareness Optimizer 5. (Shelf-based) Conjoint 6. Price Point Analysis	7. Price Performance Planner 8. Price Elasticity Analysis 9. (Shelf-based) Conjoint/ Virtual Shelf Test	10. (Shelf-based) Conjoint	11. Promo Evaluator 12. Buyer Overlap promotion vs. regular business 13. Driver Analysis (Custom Brand Success Driver) 14. Purchase Chain Analysis 15. Market Share Simulator (Promo Delisting)	16. Paint a Picture 17. Price & promotion sensitivity by statements 18. Trial & Repeat 19. Heavy/Medium/ Light for promotion business or buyers	20. Store/Brand Switch Analysis 21. Cash Bill Promo 22. Net Promotion Impact 23. Category Purchase Driver	23. Price Performance Planner 24. (Shelf-based) Conjoint/ Virtual Shelf Test

Communication

YouGov

Target Group Activation			Concept Test		Evaluation
Which target group(s) should I address with my campaign? What's the best content to reach them?	**On which channels and touchpoints do I best reach my target group(s)?**	**How do I optimally activate my target group(s) in my online or CRM campaign?**	**How does my advertising concept perform reg. awareness, attractiveness, brand impact …?**	**How can I increase my (online) leaflet performance? How should the layout look like?**	**How successful is my (CRM) campaign? How can I optimize?**

1. Segmentation 2. Target Group Profiler 3. Paint a Picture 4. Penetration Growth Driver (PGD) 5. Why2Buy 6. Adhoc Qual & Quant	7. Media Touchpoint Tagging 8. Touchpoint Planner	9. Consumer Segment Activation 10. Audience Activation / Consumer Segment Activation (via third party) 11. Data Enrichment CRM Activities (directly via e.g. CRM database)	12. Adhoc Qual & Quant	13. Leaflet Optimizer Concept Test 14. Cash Bill Combi	15. (CRM) Campaign Evaluation 16. Loyalty Card Evaluation

Path to Purchase

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?**

1. Why2Buy
2. Qualitative research, e.g. Focus Groups

3. Qualitative & Quantitative Adhoc
4. Accompanied Shopping Trips
5. Shopping Missions

6. Touchpoint Planner

7. Product Affinity Map (trip based)
8. Qualitative (e.g. Shop-Alongs, in combination with Eyetracking, if required) & Quantitative Adhoc

9. Virtual Store Test
10. Cash Bill Combi
11. Promotion Evaluator
12. Shop Alongs/ Interviews
13. Store Intercepts

14. Category Purchase Tree
15. Category Perception Workshop
16. Virtual Shelf Test
17. Product Edge, Why2Buy
18. Shop Alongs/ Interviews
19. Store Intercepts

Please see also Category, Shelf & Assortment

20. Shopper KPIs: Loyalty, Trial/Repeat…
21. Product Edge
22. Why2Buy

Innovation & Launch Management

YouGov

| Pre-Launch/Innovation-Phase | LAUNCH | Post-Launch |

| How does the market work? Where are opportunities? | Who is my potential target group? What are their needs? | What's the best packaging & positioning for my new product? | What is the performance of the launch? | How incremental is the launch? What is the positioning? | Who are my buyers? | How satisfied are shoppers with my launch? | What are the real drivers of my launch? | How to connect the insights and what are the recos? |

1. Assessing the landscape
2. Segmentation
3. Category Purchase Tree
4. Purchase Affinity Map
5. New Launch Tracker (GER)

6. Segmentation
7. Target Group Profiler
8. Paint a Picture
9. Qualitative Deep Dive

10. Qualitative Focus Groups
11. (Shelf-based) Conjoint
12. Virtual Shelf Test
13. Product Concept Test

14. Trial & Repeat Tracker
15. PUS Launch (GER)

16. Launch Impact Evaluator
17. Incremental Buyers
18. Buyer Overlap
19. Duplication
20. Product Affinity Map

21. Paint a Picture
22. Most Valuable Consumers

23. Product Edge
24. Why2Buy

25. Launch Success Analysis (GER)
26. Product Edge
27. Why2Buy

28. GfK Launch Workshop (integration of all insights on hand)
29. Product Edge

Target Group Management

YouGov

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?**

Buyer Diagnostics:

1. Shopper KPIs, e.g. loyalty
2. Demographics
3. Shopper classification, e.g. Most Valuable Consumers, Heavy Medium Light, New Lost Retained
4. Paint a Picture
5. Benchmarking
6. Penetration Growth Driver (PGD)

7. Why2Buy
8. Category Using Profiler
9. Product User Scan

Monitoring over time:

10. Shopper KPI Tracking
11. New/Lost/Retained
12. Gain & Loss
13. Duplication Analysis

14. Most Valuable Consumers
15. Segmentation
16. Penetration Growth Driver (PGD)

17. Target Group Profiler

18. Paint a Picture
19. Qualitative Deep Dives
20. Why2Buy Profile Enrichment
21. Digital Usage Profiler
22. Consumer Segment Activation

One pagers for selected solutions

01 Setting the Scene – Landscaping and Market Development

YouGov®

Measure Tree

Decomposition of sales development in key drivers

Business questions

- What are the growth drivers?
- Where does the sales growth come from?
- Why is sales falling?
- How attractive is the brand?
- How many buyers does the brand have?
- How often is the brand bought?
- How much is bought per shopping act on average?

Benefit slogan

The measure tree:

- **Decomposes** the sales development in its single components and discovers the key **drivers of the sales change** at a glance

Outcome
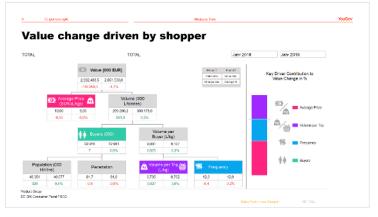
The measure tree analysis shows the development for the most important measures of products and/or shops within a certain product group.

The measures are visualized in their tree structure, revealing the mathematical connection between them, e.g. frequency * spend per trip = spend per buyer.

The Measure tree shows…

- what consumer KPIs drive value change

- what consumer KPIs influence the development of the market size or market share

- which of the consumer KPIs show the biggest growth or decline

- which of the consumer KPIs, focusing on shopping trips, has the biggest impact on growth or decline

CIV output examples

Combination Analysis

Identifying overlaps and combinations between products

Business questions

- How can buyers be grouped?

- How many buyers purchase certain products exclusively

- How many buyers purchase certain products in combination?

- Which brand is bought most strongly together with my brand?

- Which is the preferred brand? Which is the preferred variant in a comparison of brands?

Benefit slogan

Combination analysis is…

- **Best** to provide **evidence of exchangeability** of considered products. Products or SKUs with **high exclusive buyer share** are the **champions and indispensable** in your portfolio
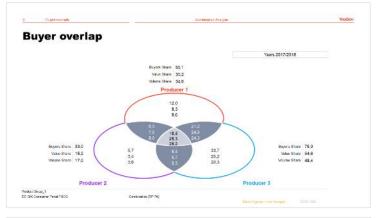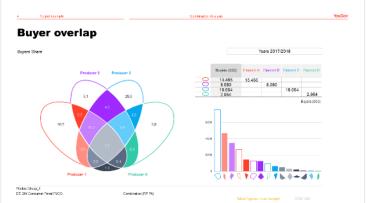
Outcome

Combination analysis shows the share of buyers that buy a certain product exclusively or in combination with other products:

- Number of exclusive and overlapping buyers

- Allocation of value and volumes

- Buyer, value and volume shares for each combination and share of exclusive buyers

- Key measures like penetration, frequency, spend per buyer for each of the groups

- Shows the degree of overlaps of buyers of different brands, products, SKUs or also retailers

CIV output examples

Duplication Analysis

Discovering the relevant set of consumers

💬 Business questions

- How loyal are buyers to my brand? Which competitor brands do they purchase?

- Which competitor brand or competitor variant do they buy most?

- Which other pack sizes, tastes or segments etc. do they buy?

- Where do they also shop? What is their preferred store?

⊕ Benefit slogan

Duplication analysis is…

- **Enabling you** to find out which other brands are your **real competitors** as consumers are also purchasing them in parallel to your brand. Helps to focus and identify **threats and opportunities.**
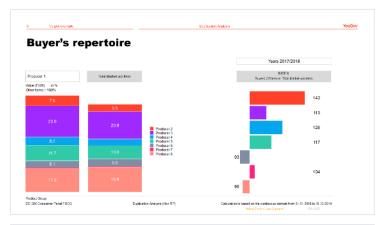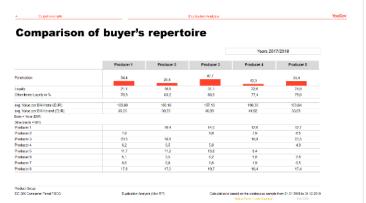
◎ Outcome

Duplication analysis delivers information about consumers' repertoire:

- Brand loyalty (% of value or volume purchased from the respective brand)

- Relevant set of brand buyers, based on value share or volume shares (% of their total market spend or volume)

- Index versus total market

- Comparison of different brand buyers

- Differentiation of loyalty classes: buyers with low (0-33%), medium (34-66%) or high loyalty (67-100%)

- Average value (or volume) per buying household

🔺 CIV output examples

New – Lost – Retained

Comparing new, lost and repeat buyers of a brand

Business questions

- How many loyal, new and lost buyers does a brand have (in comparison to other brands)?

- What changes in their repertoire can be seen for new / lost / retained buyers?

- How do these buyers change their loyalty to the brand and their purchasing of competitors?

- Where do new buyers come from? What do lost buyers purchase now?

- Who do new / lost / retained buyers look like demographically?

Benefit slogan

New – Lost – Retained Analysis is…

- giving you a **reality check** who are your brand's **loyal consumers** (retained buyers) and **provides deep understanding** where your new buyers come from and who they are and where your lost buyers went to.

Outcome

- New - Lost - Retained Buyer Analysis analyses whether a brand has won, kept or even lost buyers between two periods and how these buyer groups cover their demand in a category.

  - Repeat Buyers: purchased the brand in both periods

  - New Buyers: purchased the brand only in the second period

  - Lost Buyers: purchased the brand only in the first period

- The output of this analysis shows the size of these three buyer groups (buyer share and volume / value relevance) as well as their purchasing behaviour and profile within the two periods:

  - loyalty to the considered brand

  - spend in € and purchased volume of each buyer group

  - Repertoire (purchased volume / value of other brands)

  - socio-demographics (age, income, life stages…)

CIV output examples

Brand Switching Analysis

Evaluating pre- and post-purchases of a specific key purchasing event

Business questions

- Where do the buyers of a new product come from? What did they buy before they bought your product?

- Where do the buyers go to after the first purchase of the new product? Do they purchase the new product again (loyal customers) or do they go back to competitive products?

- How does the pre- and post-purchases change?

Benefit slogan

Brand switching is…

- **Imparting knowledge** about the **purchase acts** that happened **directly before or after** the purchase of my new product.
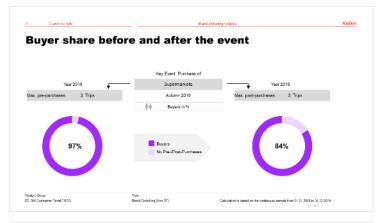
Outcome

Brand switching investigates for each panel participant, whether he made one specific key purchase in the fixed inner period and what he bought right before (3 purchases before) and right after (3 purchases after) that key purchase (=outer period).

- Key Purchase = Purchase of one specific variant, new product, promotion.

- Benchmark: Buyers who have bought in the category but not the new product (no key purchase act)

- Buyer / value / volume share of those buyers who also bought before and after the key purchase event

- Repeat purchases of the new product vs. purchases of competitor products

CIV output examples

Buyer share before and after the event

Share before and after the event

Gain & Loss Analysis

Understanding the volume or value-based gains or losses of a brand

Business questions

- How much are the gains and the losses…
  - …through new / lost buyers in the category?
  - …through increased / decreased category buying and how much can my brand benefit from this?
  - …directly from / to other brands or stores?
- How strong is the degree of interchangeability between the examined brand and the remaining brands in the market (affinity index)?

Benefit slogan

Gain & loss analysis is…

- **Revealing the source of business** for a gaining brand or launched product and how strong the **cannibalization effect** was. The analysis can also identify which **competitors profited** from losses when your own brand is losing.
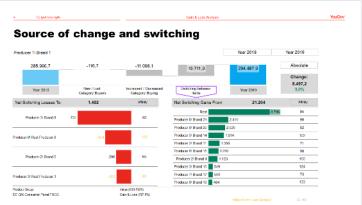
Outcome

The gain & loss analysis selects value and volume movements from one brand to another from one period to another.

a) Value or volume through new / lost category buyers

b) Increased / decreased category buying

c) Value or volume gains or losses through switching between items

- a)+b)+c) are summing up to the total sales development of the considered brand.

- Affinity index: Measures the intensity of the exchange relation between brands (= similarity / proximity of brands)

- Relative Market Share index: indicates if gains / losses from / to a brand are under or over proportional in comparison to its relevance in the market.

- These movements can be evaluated across all sociodemographic features, distribution channels, shops, pack sizes etc.

- Analysis is also available as a rolling G&L

CIV output examples

Assortment Optimization

Defining the optimal assortment

Business questions

- What is the optimal assortment of a retailer (manufacturer)? With what assortment does it reach more customers?

- Which articles do the customers buy at another retailer because they are not listed?

- Which SKUs do I need to have listed to reach the highest penetration with my brand?

- When I need to delist SKUs to implement new ones: Which are the SKUs with the least incremental penetration for my brand?

Benefit slogan

Assortment Optimization analysis is…

- **key** to optimize your brand portfolio. Helps to identify weakest and strongest SKUs to **increase** the brand's penetration. **One of the most important** analysis **for retailer negotiations**. **Perfect add-on** for the GfK SimIT tool.

Outcome

Assortment Optimization delivers the optimal assortment for a certain universe (e.g. shop or total brand):
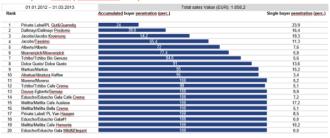
- Number of additional buyers who are reached when adding this article to the inventory

- Incremental Penetration every SKU provides on top

- Exclusive penetration (% of buyers who purchase only this SKU from selected universe)

- Assortment depth per buyers

- Ranking which products add most on top (based on number of additional buyers who are reached with every SKU)

- The analysis considers an assortment as optimal when a defined number of articles cover the largest possible number of customers of a shop
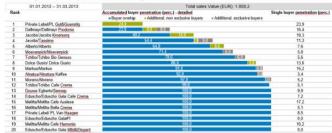
CIV output examples

To what extent do single items contribute to total penetration?

To what extent do single items contribute to total penetration, split by overlap, non exclusive and exclusive buyers?

Brand Success Driver

Assessing which variables influence the growth of your brand most

Business questions

For every marketing planning process, in a first step you need to know what are the main reasons for the actual development of a brand.

- Which marketing-mix instruments contribute how much to my brands growth or decline?

- How strong is the influence of competitors promotions or advertising?

- Did external factors have an influence?

- What topics are worth looking at in more detail?

Benefits

- Shows which variables influence the growth (or decline) of your brand most and supports the decision about and planning of marketing activities

- Transparent and quick to prepare → Lower costs and faster than existing complex tools

Output examples

The "Waterfall chart" shows the share of all incoming influences on the change in sales at a glance

Fictitious example:
Mineral water brand X - Period: Year 2018 vs. Year 2019

Change per driver from 2018 to 2019 und the related impact on sales of the focus product

Fictitious example:
Mineral water brand X - Period: Year 2018 vs. Year 2019

Research approach

Holistic approach: Testing of jointly defined hypotheses based on consumer panel data and quantification of all influencing factors

- The causal analysis connects weekly sales with driver variables (promotion, media spendings, distribution of focus brand, seasonal influences, etc.) and based on this, calculates reasons for changes between two periods.
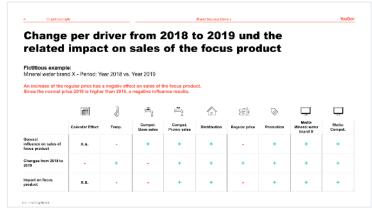
Outcome

- Compact output on one chart: The "Waterfall chart" shows the share of all incoming influences on the change in sales in thousand Euros at a glance.

→ Identifying the most important drivers (the „big picture") can be used to find strategic levers or topics for deeper analysis

02 Target Group Management & Communication

Buyer Target Group Report

Purchasing behaviour of target groups

Business questions

- What is the purchasing behaviour of the buyers of my brand?

- What do buyers of other brands buy?

- What do buyers of stores, pack sizes, tastes buy?

- Where do they shop?

- Are they intensive or low buyers in the category or for the brand?

- How do they look like?

Benefit slogan

Buyer target group report is…

- **The easiest** way to evaluate different target groups **without complex definitions**. Full range of facts provides a **quick and deep understanding** of different buyer groups.
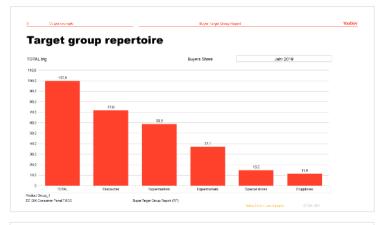
Outcome

Buyer target group report delivers insights about different groups of buyers:

- Key measures

- Development over time by different periods like MAT, YTD, full year, half year, etc.

- Rankings based on target group preferences e.g., % of spend in different channels or retailer or for different category segments

- Comparison between target groups to find out differences and commonalities

CIV output examples

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**:

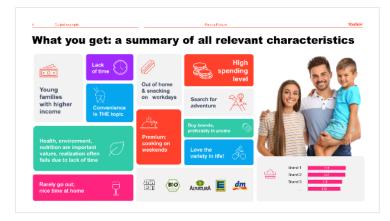| (measured) factual purchase behavior	+	(queried) attitudinal statements

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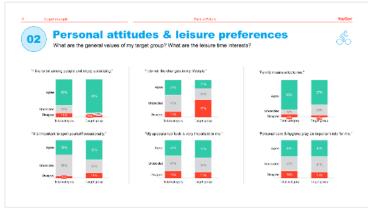
Outcome

- 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

Target Group Profiler

Quantification and profiling of the marketing core target group

Business questions

A strategic and targeted customer approach is important for different growth routes:

a. **Growth through activation**
How can we better exploit the potential of our established (possibly stagnating) product, increase its reach?

b. **Growth through innovation**
How can we successfully launch a new product / variant or jump onto a new trend?

Research approach

- Step 1: **Identifying** consumers with highest growth potential for the brand in the intended direction (☐ current or possibly new positioning)

- Step 2: **Quantifying** brand core potential in # of buyers and value (thereby considering the relevant market conditions)

- Step 3: **„Painting a Picture"** of the identified brand potential group

Benefits

Reveals opportunities for brand growth:

- **Identifies & quantifies shoppers with highest potential** for brand growth in each direction (→ current or possibly new positioning)

- Detecting the key characteristics of the core potential group (**= Shopper DNA**) allows to deduce concrete measures for product portfolio, distribution and communication strategy
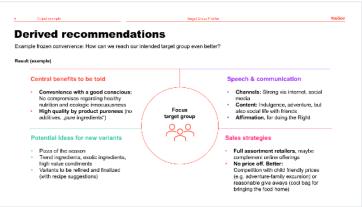
Outcome

The potential of your growth route and how you can successfully leverage it

- Basis for decision-making (potential in # of buyers and value)

- 360° profile of identified core potential group and - in comparison - current (brand or category) buyers

- Deduction of activation measures on all relevant levels: product, price, distribution and communication (marketing mix)

Output examples

Shopper Segmentation

Identifying strategic consumer types

Business questions

- How can we define shopper segments based on **relevant KPIs** for your brand or category?

- **Which shopper segments can be defined** and what distinguishes them from each other?

- What is the **real potential for each shopper segment** and how should we prioritize segments?

- How can we best attract the promising shopper segments and **leverage the potential**?

Research approach

- YouGov Consumer panel data is the foundation, combined with standard attitudinal data and optional tailor made why2buy attitudinal data

- We group households/individuals based on their similarity in certain variables

- After that, we calculate the growth potential for individual segments for category or brand in total and at retailers, and explain how to leverage it

Benefits
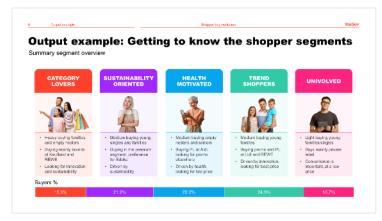
- Defines opportunities for growth and quantifies the size of the prize for the different courses of action

- Helps to develop **successful growth strategies for brand and category** and to provide thought leadership in retailer relationships

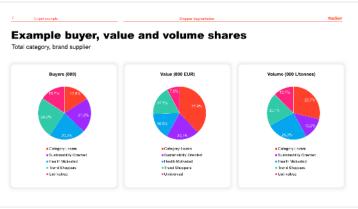- Facilitates category development strategies and shopper activation to win the relevant shopper segments

Outcome

- **Definition of the segments** by demographics, (why2buy) attitudes and purchasing behaviour

- **Topline KPIs** like penetration, frequency, value per kilogram, price per pack and average pack size, for different segment-category-subcategory-brand-retailer crossings

- **Growth potential** in EUROs for these crossings

- **Action plan** for most promising segments, including advice on how to leverage potential

Output examples

Output example: Getting to know the shopper segments

Example buyer, value and volume shares

Penetration Growth Driver

Setting the right priorities within penetration management

Business questions

To maintain and grow penetration, one should focus on the right growth drivers:

- Which **drivers were most characteristic for new and retained shoppers** in the past?

- **How many shoppers can be recruited or retained** by these drivers at best today?

- **Which drivers to focus** on in the future to **maximize recruitment and retention**?

Research approach

- **Collecting Data:** Collecting both purchase data (via scanning) and attitudinal data (via statement questionnaires).
- **Buyer Movement:** Determining which shoppers of your brand are new, lost or retained buyers over a two-year period.
- **Driver 'Power':** Analyzing what specific drivers drove new shoppers to join the brand and retained shoppers to stay.
- **Driver 'Pool' :** Analyzing how many non-buyers and how many lost buyers could be convinced at best by these drivers.
- **Generate 'Boosters' & 'Keepers':** Combining driver Power and Pool results in an overview of Boosters and Keepers to focus on in the future.

Benefits

- PGD considers **current performances** and **outstanding pools**, and makes a clear **distinction between recruitment and retention**, which often requires different winning strategies.

- With this, PGD provides an **overview of the most important drivers responsible for recruiting and retaining shoppers**.

- As a result, PGD allows you to set the **right priorities within penetration management**, ultimately growing your shopper penetration and brand turnover.
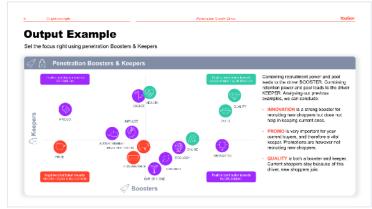
Outcome

4 unique modules allowing you to set the focus right:

- Module 1: **Penetration Drivers**
  - Which core penetration drivers should I be focusing on to keep and boost my penetration?
  - What specifics define each of these core penetration drivers?
- Module 2: What **Socio-Demographics** to focus on?
- Module 3: Identification of **Competitive Field**
- Module 4: **Retailer Landscape** - what retailers are most important?

Output examples

Most Valuable Consumer

Setting the right priorities within penetration management

Business questions

- How to find the **most valuable buyers** for a brand/category?
- How to identify the b**uyers with the highest growth potential**, as well as the group of buyers most loyal to the brand?

Benefits

- Determination of potential development paths for the brand/category.
- Identification of actions towards buyers with the highest growth potential as well as actions for loyal buyers.
- Optimization of marketing investments (ROI on buyers)
- Single source - characterization of potential buyers from an opinion perspective and based on actual (not declarative) purchase behavior.

Research approach

Definition of buyer groups by:

- definition of heavy/medium/light category buyers based on category purchase intensity
- definition of brand loyalty

Description of buyer groups through:
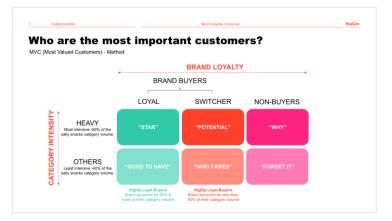
- KPI's, Purchase portfolio/main competition, Channels and/or retailers; cross-purchase with other categories; Demographics and characteristics concerning purchasing behavior, opinions, lifestyles, etc.
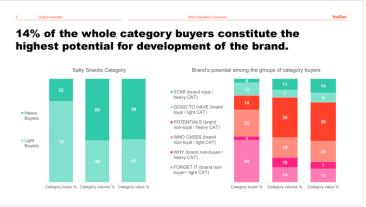
Outcome

- **Identification of buyers with the highest growth potential**, as well as the group of buyers most loyal to the brand.
- **A multidimensional portrait of potential buyers** detailing their purchase metrics, opinions, lifestyle and demographic description.

Output examples

Who are the most important customers?
MVC (Most Valued Customers) - Method

14% of the whole category buyers constitute the highest potential for development of the brand.

Touchpoint Planner (TPP)

How do you focus on the touchpoints in the consumer journey that really pay off?

Business questions

- What does the consumer journey look like for my brand, category or retailer?
- Are consumer journeys different for specific target groups and/or occasions?
- On which touchpoints should I focus to maximize the impact on purchase, repurchase & shopper satisfaction?
- How is touchpoint content performing against consumer expectations? Where can we improve?

Research approach

- Structured survey, approx. 20 minutes
- Respondents recreate their consumer journey by playing an online game during the survey
- The collected data are analyzed by using a Machine Learning approach, suiting our research requirements
- The results are presented during an actionable workshop and in an online dashboard

Benefits

- Understanding of the complete journey, incl. online, offline, in home, out of home, social
- Understand both reach and impact of touchpoints and which touchpoints reinforce each other
- Optimizing consumer journey by
- More impactful planning of touchpoints
- Optimizing touchpoint content

Outcome

- Mapping of consumer journey
- Touchpoint Effectiveness: Distinction between reach and impact of touchpoints on demand increase
- Synergies between touchpoints: Which touchpoints reinforce each other to create additional impact?
- Content performance: Information on expected content for individual touchpoints including assessment of pain points
- Consumer Touchpoint Activation plan
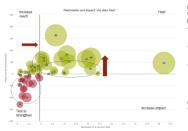
Output examples

Which Touchpoints contribute the most to Julia's demand increase?

Wine shelves are important to activate Julia, as are experiences around wine: experience are more effective than mass media

Shopper Audience Activation

Make sure to bring strategic audience planning into tactical campaign implementation – with no loss in data quality or detail. Target your ideal shopper segments on the right channels *.

Business questions

- How to make sure that our valuable marketing segments are also seamlessly used for online media activation?

- How to win new shoppers and grow my brand and category effectively?

- How to optimize targeting accuracy, campaign effectiveness and efficiency?

Research approach

- YouGov provides unique shopper segments, based on high-quality first-party data, incl. demographics, purchases and more.

- Segments are connected to the digital universe via fusion or by PII-data matching to 3rd parties.

- Advertisers are enabled to use strategic audiences for campaign execution.
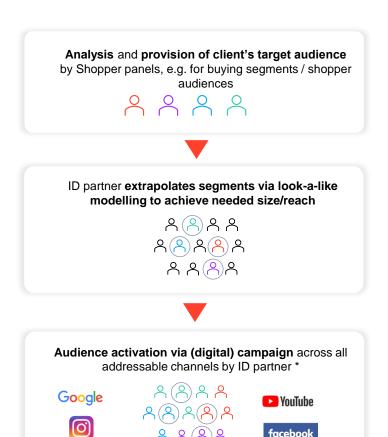
Benefits

- Integrate sophisticated audience information with your marketing ecosystem to reach your purchase-based segments.

- Gain new buyers or activate existing buyers to grow your category.

- Target more precisely and deliver maximum ROI on your cross-media campaign planning.

Outcome

- Shopper panel-based seed audience is provided to a trusted partner for look-alike modelling and extrapolation.

- Extrapolated audience is ready for being pushed to the determined DSPs and publishers for campaign activation.

- Our solution is cookie-less / future-ready!

Analysis and **provision of client's target audience** by Shopper panels, e.g. for buying segments / shopper audiences

ID partner **extrapolates segments via look-a-like modelling to achieve needed size/reach**

Audience activation via (digital) campaign across all addressable channels by ID partner *

Shopper Audience Activation available Q1 2025 across YouGov key markets (GER, IT, POL, NL/BEL)

Why2Buy & Whynot2Buy

Integrated survey insights go beyond and tell you what shoppers think and feel

Business questions

- Key questions for a better understanding of the shopper:
  - Which criteria are decisive for the purchase of my category / product?
  - What are barriers why shoppers do not buy my product/category?
  - Why did the purchase behaviour change in this category, e.g. decrease of specific products?
  - What are my products used for and why?
  - How satisfied are the actual first buyers with my product?

Benefits

- Input for marketing and communication strategy.
- Basis for product development or diversification.
- Support for placement, cross-selling, promotions etc.
- Basis for the observation of structurally equal target groups.

Research approach

- Ad-hoc survey on panellists
- We identify, through the YouGov shopper panel, the groups to be surveyed (flexible definition based on purchases: new buyers, regular buyers...).
- We send a survey to the selected panellists or add questions on the scanner
- We can combine the results of the survey with purchase behaviour analysis
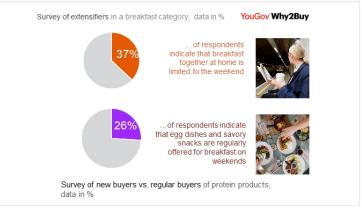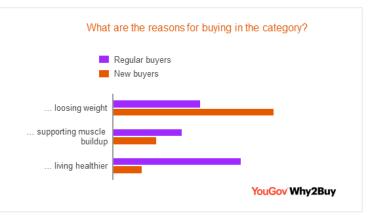
Outcome

Regarding from question e.g.:

➢ Identification of purchase motivators: What criteria are crucial for the purchase of my product, segment or my category?

➢ Reasons for the extensification or intensification of consumption of a category, a brand, a product, or with a retailer – further than the purchase-based analyses

➢ Revelation of consumption occasions: Who is consuming, the products or brands in focus where, when, how and what for?

Output examples

Survey of extensifiers in a breakfast category, data in %

...of respondents indicate that breakfast together at home is limited to the weekend

...of respondents indicate that egg dishes and savory snacks are regularly offered for breakfast on weekends

Survey of new buyers vs. regular buyers of protein products, data in %

What are the reasons for buying in the category?

- Regular buyers
- New buyers

... loosing weight
... supporting muscle buildup
... living healthier

03 Innovation & Launch Management

YouGov®

Launch Analysis

Insights on the launch performance of a new product

Business questions

- How is the performance of the launched products?

- How high is the penetration 6 months after launch?

- Are the shoppers of the new product satisfied with the product and buy it more than once?

- Is the launch performance above or below the average launch performance in my category?

Benefit slogan

Launch analysis…

- Delivers **insights** on the **launch performance** of a product within the first months compared to key competitors and category average

Outcome

The launch analysis delivers insights on the performance of a product launch by benchmarking its most important KPIs. Its performance is compared (benchmarked) with the performance of other launches in the same market with launch dates within the selected period.

The most important KPI for the launch analysis is penetration. For each launch the KPIs are compared to a set of benchmarks (either the predefined average of all, of top 5%, of top 20%, of flop 20%, or custom defined benchmarks) within the scope of the introduction. The Top/Flop benchmarks are optimized on the penetration of the last cumulated period.

By comparing the development in penetration and repeat rate, and by relating these to the benchmark positions, directions for actions can be defined.

CIV output examples

Launch Impact Evaluator

An optimized way to assess the performance of product launches

Business questions

- How much does the new product **help the brand generate incremental revenue**?

- How much does it **help the category grow**?

- Where do the sales that my newly launched product has made come from?

Benefits

- Evaluates the **impact adjusted for general market trends** independent of the launch

- **Flexibility** regarding category definition

- **Detailed view of the brand switch / sourcing**: Zooming into the brands (own portfolio and competitors) from which the new product sources (absolute & index view)

Output examples

How to measure?
For products without history, we need time- plus control group comparison

Decomposition of the generated launch sales
Into real incremental vs cannibalization
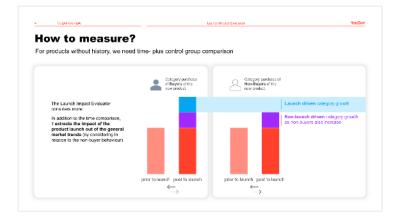
Research approach

- **Time comparison**: Pre-launch and post-launch

- **Control group approach**: In addition, we compare the buying behavior of buyers to that of non-buyers (exclusion of general market trends).
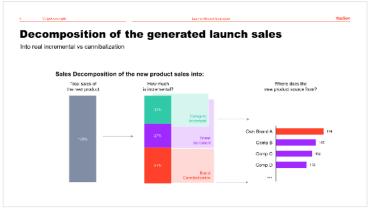
Outcome

- **Decomposition** of the generated sales (turnover and sales volume) of a new product into the dimensions:

  - incremental for the category

  - incremental for the brand

  - cannibalization of own brand

Product Edge

Global standardized approach to measure product performance

Business questions

- **What is driving the product performance?**
(recently launched and/or established products)

- How is the product rated vs the competition? What are core strengths against competitor brands?

- Which product attributes are associated with overall product performance/experience?

- Which attributes correlate with higher spend & how does it compare vs competition?

- How do ratings compare by target group?

Research approach

- **Why2Buy questionnaire in the YouGov shopper panel:**

- Brief screener and 8 questions on a 1-7 scale

- LOI ~4 min;

- Two options available based on product's lifecycle / sample sizes:

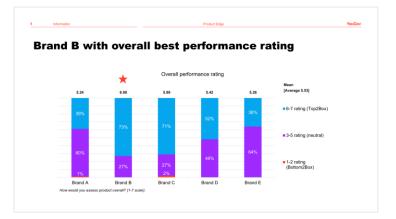|	PLUS	AGILE
Per focus product:	n=250	n=150
Per competitor product:	n=150	n=100

Benefits

- **Valid and relevant results thanks to the linking of the Why2Buy results with measured behavior data**

- Benefits vs. „ad-hoc product testing":
based on real purchase behavior, objective evaluation, tracking possibilities

- Benchmarking
portfolio / competition / cross country

- **Scalability**: available across all YouGov shopper panel and Kantar Worldpanel countries
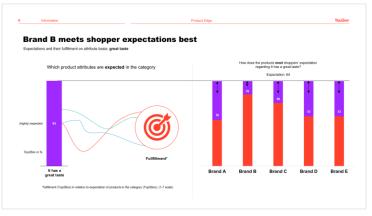
Outcome

- **Benchmarking**: Core strengths of a brand/product against competitors

- **Prioritizing**: Attributes that are associated with overall product experience and higher spend

- **Quantifying** the opportunities to improve the rating across attributes

- **De-Averaging** the shoppers of each brand (for Product Edge PLUS only)

Output examples

04 Shopper Management

YouGov®

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)?

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

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

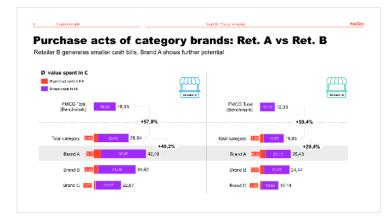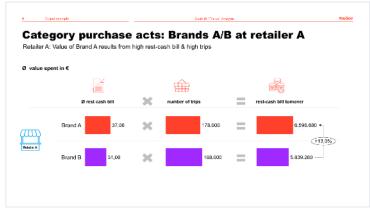- **Benchmarks** allow for comparison to competitor products or retailers

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

Purchase acts of category brands: Ret. A vs Ret. B
Retailer B generates smaller cash bills, Brand A shows further potential

Category purchase acts: Brands A/B at retailer A
Retailer A: Value of Brand A results from high rest-cash bill & high trips

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
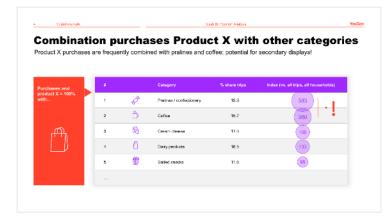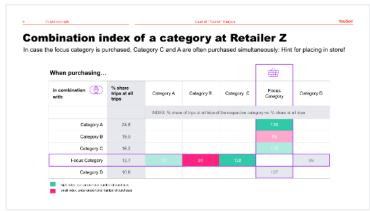
Outcome

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!

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!

Shopping Missions

Increasing trip performance by understanding purchase patterns

Business questions

Aiming to recognize potential and increase exploitation, retailers face the challenge of understanding the individual shopping act and the needs behind it as well as possible.

- How relevant is every single Shopping Mission for me as retailer/ for my brand?

- How attractive am I in the different Shopping Missions for shoppers, how well do I cover them?

- What makes the Shopping Missions special? What characterizes them?

Research approach

- The purchase acts are classified by purchase patterns

- The analysis is based on the composition of the shopping basket and the circumstances of the purchase:

  - Number of categories purchased

  - Focus of the shopping basket (fresh products share, promotion share)

  - Interruption of the routine? (un)usual cash bill, shop, weekday

Benefits

- Shopping Missions are evaluable for traditional food retailing, specialist stores and e-grocery, with only few exceptions e.g. DIY stores, computer shops etc.

- Combination with CM KPIs enables even better identification of growth potential

- Consideration of specific target groups/segments also possible

Outcome

- Identification and quantification of shopping patterns

- In total six Shopping Missions are differentiated: Cherry Pick, Small Purchase, Fresh Food Purchase, unusual Stock Up, Routine Stock Up, Bulk Purchase

- Uncovering relevant shopping missions

- Evaluation of potentials

Output examples

Purchase Affinity Map

Unveiling the intricate web of connections between products

Business questions

Understanding category structures and product interrelations is complex.

Comprehensive knowledge of the relevant affinity structures is fundamental for:

- Brand & portfolio positioning
- Product development
- Shelf optimization

Benefits

Provides an **understanding of the essential market characteristics and structures** of your focus category "at one glance".

- Uncovers the most important market dimensions
- Flexible and highly customized analysis set-up
- Crucial base for e.g. positioning and listing decisions, innovation management and optimization of shelf placements

Output examples

Intuitive map of your category
Enabling a clear understanding of product relationships and market structures

Including heatmaps projecting different KPIs
Allowing quick and intuitive analysis of critical competitive fields

Research approach

The Purchase Affinity Map is based on **multidimensional scaling**

- It identifies multidimensional affinity patterns between products or categories based on factual purchase.
- Then, it graphically visualizes the affinity structures over distances (showing the key market dimensions in a 2-dimensional space).
- The emerging axes represent the major market discriminating characteristics.
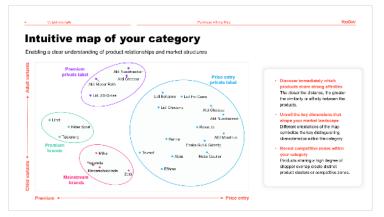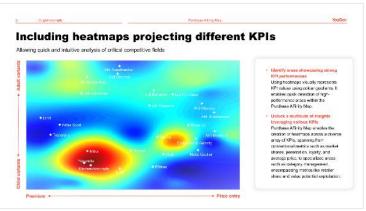
Outcome

A **Purchase affinity map** that optimally visualizes the product relations within the category.

Affinities are displayed by distance and thus enable a quick understanding of complex product or category relations and market structures:

- Products which are highly affine to one another
- "Product worlds" & "standalones"
- The dimensions that "explain" the market (the most discriminatory attributes of the category)

Purchase Decision Tree

Understanding the path of consumer decisions and leading decision criteria

Business questions

- Which **criteria are relevant** to the shopper and in which **sequence** when purchasing the category?
- How to improve controlling the assortment?
- How should the **placements and shelve layouts be adapted** at POS to better meet customer expectations?
- What makes the **POS communication** more efficient?

Benefits

- **Identification** and **validation** of purchase decision criteria in terms of relevance / order
- Gaining insights on the criteria which are not captured by the shopper panel and their importance in the decision process
- **Supports** and **optimizes** communication, shop layout and shop orientation within a category
- Gaining a **better** and **deeper understanding** of the category when it comes to decision processes

Output examples

Overview of decision cluster

Almost 40% of the decision-making processes are brand-oriented, 30% are based on the price - often in combination with other criteria

Result

Research approach

Quantitative ad-hoc survey

- Questionnaire with decision criteria for a category (LOI: 15 min) to be e.g., ranked by shoppers based on their perceived purchase path for the last purchase.
- Shoppers who bought the category in the past XX months (depending on buying frequency)
- Virtual shelf approach is ideal for more realistic decisions, delivers also TURF and Gephi analysis besides the decision trees
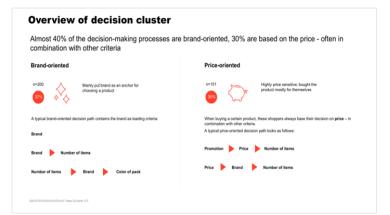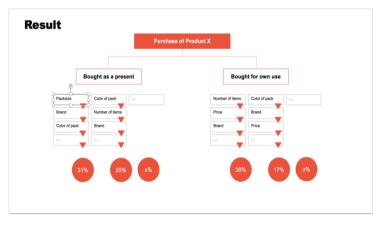
Outcome

Delivers significant insights with respect to the shopper's decision (at the store):

- **Identification of purchasing types** due to motives
- **Quantification of various decision trees** with information on the frequency of their occurrence
- **Defining measures for manufacturers** and/or **retailer** to optimize the category orientation for the shopper

Category Purchase Tree

Deriving shopper decision criteria from purchase behaviour

💬 Business questions

- How do shoppers decide (explicitly & implicitly) in my category / how is it structured?
- Which **purchase criteria** are relevant? By which criteria do they decide?
- What does this mean for my category strategy? How can I **achieve growth**?
- Do I have a **strong position** and the **right portfolio** (any white spots / duplications)?
- Which learnings do I get for **shelf organization**?

⚙ Research approach

- Based on Consumer Panel data (real life purchase data, no simulated test scenario)
  - We **identify levels of duplication** (purchase behaviour of all category shoppers)
  - We **identify groups of products** by strong relation (mutual duplication of all products to one another), bring it in **hierarchical structure** and visualize it in a **tree**
  - We **prioritize the strength of the relationship**
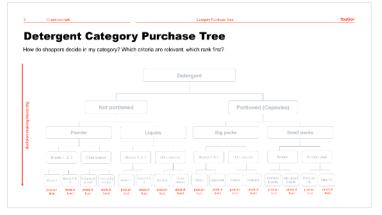
⊕ Benefits

- **Arguing for listings** based on the role of brands in the segments
- Identifying worthwhile **segments for innovations** / line extensions
- Detecting how to **successfully activate the shoppers** of the relevant segments
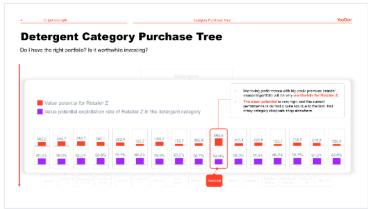- Developing suggestions to **improve the placement of the portfolio** on the shelf

◎ Outcome

- Essential input to develop the category strategy, a fundament of planogram optimization
  - **Purchase criteria & hierarchy** incl. product allocation
  - **Clusters of products** with strong interrelation
  - **Category KPIs** for all product clusters (e.g., penetration, frequency, market share of brands) to identify & leverage truly potential clusters
  - *Optional*: Loading of clusters to AnalyzeIT

Output examples

Market Share Simulator

Understanding the impact of delisting for own brand, competition and retail

Business questions

- How will a brand delisting impact volume, value and market share in case…
  - A retailer wants to delist a client's brand or SKU
  - A supplier wants to give delisting advice to a retailer about another supplier's brands or his own brands
  - A retailer would like to know the effects of rationalization
  - A retailer will disappear from the market: which retailers will be most important for the brand?

Research approach

- We **simulate the considered delisting based on real household purchase sequences of categories and brands.** This way we can calculate the effects on volume, value and market shares.
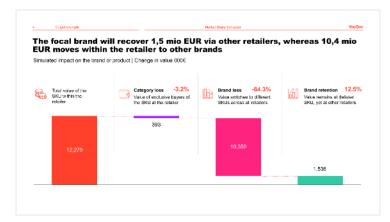
Benefits

- **Upfront insights in delisting impact:** understand the impact of delisting your brand
- **Retailer argumentation:** valid input to renew discussions with the retailer, or develop opportunities with other retailers
- **Better preparations for negotiations** by understanding the impact of delisting and financial consequences
- The big sample size of our panel provides **high reliability** and high detail regarding the analysis

Outcome

- Reveals delisting's **consequences for volume, value and market shares** for brands and retailers
  - Simulated impact on the brand or product
  - Simulation of retailer & brands risk
  - Simulation of brand positions on the market after delisting focal brand
  - Simulated market shares when focal retailer delists the focal brand (also for retailers)

Output examples

The focal brand will recover 1,5 mio EUR via other retailers, whereas 10,4 mio EUR moves within the retailer to other brands

Simulated impact on the brand or product | Change in value 000€

	Total value of the SKU within the retailer	Category loss -3.2% Value of exclusive buyers of the SKU at the retailer	Brand loss -84.3% Value switched to different SKUs across at retailers	Brand retention 12.5% Value remains at delisted SKU, yet at other retailers
	12,279	393	10,550	1,536

Retailer A recovers 47% of the volume with Competitor 2 and PL. The focal brand will lose 87% and can only make up for 13% via other retailers.

Full overview of delisting impact | Change in volume

	Total market	Focal brand	Competitor 1	Competitor 2	Competitor 3	Competitor 4	Private Label
Retailer A	-1.288	-2.749	+78	+448	+24	+54	+648
Retailer B	+276	+158	+4	+48	+10	+3	+34
Retailer C	+426	+136	+10	+73	+1	+4	+121
Retailer D	+140	-14	+0	+8	+0	+0	+113
Retailer E	+116	+0	+0	+6	+0	+0	+110
Retailer F	+331	-47	+5	+34	+6	+2	+140
Total	0	-2.393	+98	+617	+43	+64	+1.166

Category Purchase Driver

Identification of categories´ main levers for loyalty

Business questions

- How do retails **perform** in category dimensions **compared to the competitors**?

- What are the major **reasons why shoppers buy a category in a store?**

- Which **category dimensions** do manufacturers and retailers need to improve to **increase the loyalty?**

- Which measures need to be prioritized in the CM process, which measures can be neglected?

Benefits

- **Valid and relevant results** thanks to the **combination of a measured fact (loyalty) with why2buy results** explaining the "WHY" in the category management process:

- **Actual drivers of loyalty** instead of perceived importance of a dimension by shoppers

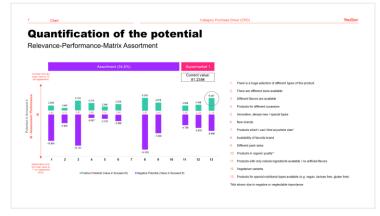- **Comprehensive picture of the main levers** (up to 35) for loyalty in the category

Output examples

Research approach

- **YouGov Why2Buy** questionnaire in the panel:

- ~5min with min n=500 shoppers per retailer (buyers and non-buyers of the category)

- Asking for the performance of the retailer in up to 35 category dimensions (2 retailers per shopper)

- Key method: Shapley Value Regression and linear Regression, separate per retailer. Loyalty (dependent variable from the YouGov shopper panel) is explained by survey data (performance of the retailer)

Outcome

- Comparison of the **performance of retailers** in a broad range of all relevant **category dimensions**

- **Retailer specific importance** of the areas of Price, Promotion, Product and Placement

- Actionable **performance & relevance maps** on the **specific dimensions**; identifying in which important parameters the retailer needs to improve

- Quantification of lever effect: potential **value gain** per category dimension at each retailer

Purchase Chain Analysis

Analysis of purchase behaviour before and after purchase of a focus product

Business questions

With YouGov „Purchase Chain Analysis" we analyse purchase behaviour of households who have purchased a focus product - wha**t did they buy before and after buying the focus product?**

- How can I foster up-trading?

- How can I bring new customers to a category?

- What impact did certain market events (e.g., product changes, competitor launch), life stages (e.g., maternity) or marketing measures (e.g., overfill, cross promo) have on shopper behaviour?

Research approach

- Purchase Chain Analyses look at a **focus purchase within a certain time** and analyse **all pre- and post-purchases.**

- Each household with a focus purchase has an individual purchase chain (e.g., different start or end). However, all **pre- and post-purchases** must take place within a **typically equivalently long period**.

- Individual buyer household's purchase chains are cut out and aggregated

Benefits
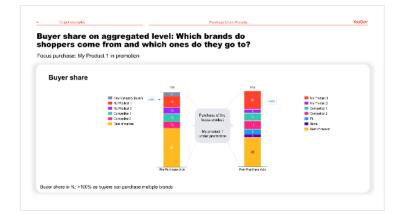
- **Exact trace** of each single purchase chain: the exact order of subsequent purchases is considered.

- **Fair comparison** for each single household (with different timings of the focus purchase) as **the same length of post period** is considered.

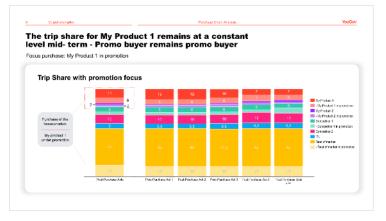- **Mid-term perspective**: Not only immediate post purchase but **each subsequent post purchase** can be evaluated.

Outcome

- The **short- and mid-term development** of purchase behaviour prior to and after a focus purchase act is analysed and explained.

Output examples

05 Price & Promotion Management

YouGov®

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
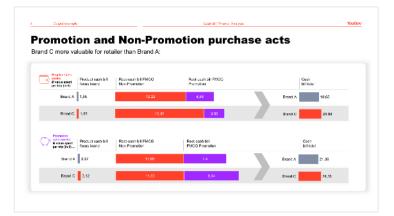
Outcome

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

Promotion and Non-Promotion purchase acts
Brand C more valuable for retailer than Brand A:

More traffic & turnover potential at brand c-pr.
Promotion purchase acts of brands at retailer Z compared to Non-Promotion

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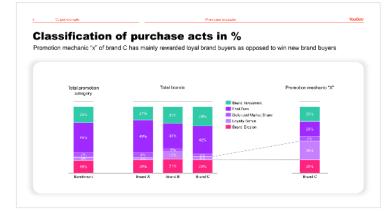
- Broad as well as detailed view: total brand view as well as analyses of specific accounts or particular mechanics or link with buyer characteristics possible

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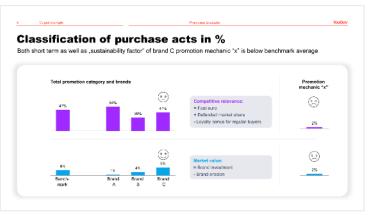
Outcome

- **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

Net Promotion Impact

How strong are switching and category growth effects generated by promotions?

Business questions

- **How profitable** are my promotions? How can we maximize the value of our promotions?

- **How effective** are different promotion types or mechanisms?

- Do promotions **really change behaviour?**

- What can we **recommend to retailers** in terms of promotion efficiency and the promotional mix?

Benefits

Detects the **incremental net effect** of promotions
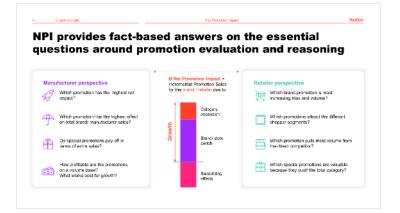
- Shows the effect a promotion has on **category expansion, store switch** <u>and</u> **brand switch**

- Detects **factual promotion profitability**

- Quantifies effects considering both **manufacturer** <u>and</u> **retailer perspective**

- NPI supports promotion evaluation & planning and provides the **basis for retailer negotiations**

Output examples

NPI provides fact-based answers on the essential questions around promotion evaluation and reasoning

What is the source of volume of a brand's promotion? Which shopper types are particularly attracted?

Research approach

- **Analysis** of CP households **on an individual basis** whether and how they change their purchasing behaviour when buying price promotions (→ buy more, brand switch or store switch, no change)

- This makes it possible to **deconstruct the promo business (volume, value, trips)** in incremental business (= growth), expansion of the category through higher category consumption, store switch/ brand switch or subsidized money
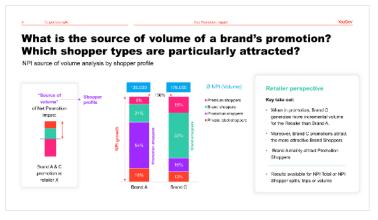
Outcome

- Identification of **incremental drivers of promotions** (brands, promotion mechanisms, pricing strategy)

- % distribution of promotion business in **incremental and cannibalizing trips**

- **Quantification of the source of volume:** From which other retailers and brands does this promotion draw which volume?

Price Performance Planner (PPP)

Forecasting effects of price/promotion changes

Business questions

- What is the **right price and promotion level** for my brand in the competitive market and across retailers?
- What possible **effects** on the market can I expect if I **change prices or promotion**?
- What is the **sales potential from a change in (promotion) price** for the manufacturer and the retailer.

Benefits

- **Price and promotion discussions** can be objectified (internally as well as with retailers)
- Effects of **various price/promo scenarios** can be estimated
- Effects can be determined from the **manufacturer's and retailer's perspective**
- Differentiated view of the effects by **target groups** (e.g. regular buyers of the brand, families with children, etc.) is available
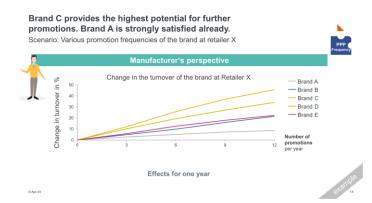
Research approach

- The Price Performance Planner is a **multinomial logit category model** that **estimates the effects a (promotion) price change** of a brand has on the sales and turnover within the market.
- The Price Performance Planner is **based on household panel data**. Therefore, it takes **brand and store switching** of households into consideration.
- Thanks to the household panel data effects of price changes can be calculated **also for different target groups.**

Outcome

- **Simulation of different price/promotion scenarios** and their impact on sales and turnover:
  - ➢ effects of price/promotion increases
  - ➢ effects of price/promotion decreases
  - ➢ effects on brand, competitors and retailers
- Simulation also on target groups possible to understand their reactions on price/promo changes

Output examples

A shelf price reduction to € 1,99 would lead to an overall growth in turnover of 3% or 4% at retailer X.
Scenario: Reduction of shelf price of Brand A from € 2,59 to € 1,99

Brand C provides the highest potential for further promotions. Brand A is strongly satisfied already.
Scenario: Various promotion frequencies of the brand at retailer X

Inflation Tracker

Understanding inflation and how shoppers change behaviour due to price changes

Business questions

Full understanding of the current pricing situation:

- In what extend are my price increases in line with my category and competitive brands?
- In what extend are my shoppers willing to pay for price increases, or looking for cheaper alternatives?
- How is this changing over time?
- What retailers and target groups show the most significant downtrading effects within my category?

Benefits

- Inflation Tracker quantifies different levels of price evolutions and separates them into:
  - **Inflation effects**
  - **Trading effects due to shifts in demand**
  - **Trading effects due to shifts in assortment**
- The Inflation Tracker therefore provides insights on different inflation rates, and the willingness of shoppers to pay for these increasing prices or looking for economic alternatives.

Research approach

- **Consumer Panel Scanning**: all household purchases and prices paid are gathered daily
- **Price Evolutions**: Continuous price comparison over time of every SKU within every channel
- **Price Effects**: Determination whether price changes are driven by inflation, changes in assortment or changes in demand
- **Aggregation**: Aggregating all price changes and effects to a level of choice (category, brand, channel, etc.)

Outcome

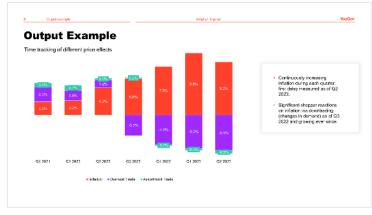Custom made reporting adapted to client needs:

- Detailed split of price effects combined with the original volume KPI evolutions (Tracking pricing effects over time & Benchmarking categories and brands with competition)

or

- Tailor made reporting, delivering insights on the level of detail of your choice: selection of retailers, categories, brands, target groups etc.

Output examples

Shopper Price Sensor

Understand shopper's coping strategies for price increases in categories

💬 Business questions

- What strategies shoppers take in the face of rising inflation?

- How purchasing behaviour is changing?

- Do shoppers change distribution channels? Brands?

- Are shoppers purchasing more Private Labels or promotions? Or do they stockpile?

⊕ Benefits

The "Shopper Price Sensor" identifies the different coping strategies shopper take in on a category/brand level to distinguish different shopper segments and their purchase behaviour:

- allows for various follow up analyses **to find aspects to influence behaviour changes in the specific category**
- **integration of different shopper segmentation**
- retailer and brand splits possible
- **tracking of development**

⚙ Research approach

We divide the category/brand shoppers into groups analysing their purchases in 2 periods:

- New/lost category buyers – purchase in 1 period

- Unaffected category buyers – no changes

- Buyers changing their purchases – behaviour change:
  - ✓ buying cheaper brands
  - ✓ switch to Private Labels
  - ✓ switch to discounters
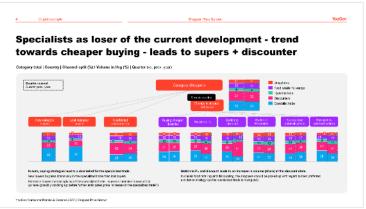 - ✓ switch to promotion
  - ✓ buying more/less
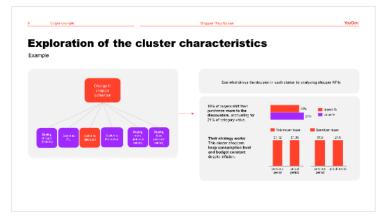
◎ Outcome

Detailed exploration of each group/coping strategy according to:

- KPI's - cluster characteristic in 2 periods

- set of brands bought and its changes in order do derive the right strategy to attract them

- profile of the shopper in order to effectively target them

- retailer performance in the respective clusters to identify risks and define „defend" strategies

Output examples

Thank you!

YouGov®