YouGov

BELGIUM

Consumer Panel Training

The Coca-Cola Company

Karel De Ridder, Stijn Geens & Mathias Vermeersch

November 6, 2024

Introducing myself

Karel De Ridder

At GfK since 2019: Market Analyst

2022: Account Manager in Belgium for Coca-Cola

The team in Belgium

Karel De Ridder	*Account Manager*	karel.deridder@gfk-cps.com
Stijn Geens	*Market Analyst*	stijn.geens@gfk-cps.com
Mathias Vermeersch	*Market Analyst*	mathias.Vermeersch@gfk-cps.com

Europanel

Collaboration between YouGov & Kantar

Collaboration between YouGov and Kantar regarding the consumer panels, in order to meet research needs of international clients in FMCG & Retail.

- YouGov: panels in BE, NL, DE, SE, DK, IT...

- Kantar: panels in FR, UK, SP…

europanel

POWERED BY KANTAR & CPS GfK

1 YouGov

YouGov Integration

YouGov and CPS GfK build on and complement each other's strengths.

YouGov®

YouGov is a market leader in consumer opinions, motivations, wants, and media habits, bringing a history of tech innovation and a deep understanding of more than 26 million registered panel members.

YouGov turns living data into business intelligence.

GfK CPS

CPS GfK provides deep insights into shopper behavior, with over 70 years of knowledge and experience as a trusted market leader.

CPS GfK answers where, what, when, how much and why people buy.

Between **Kamala Harris** and **Donald Trump**, who would you **prefer to have as president**? (% of U.S. adult citizens)

DONALD TRUMP 48% | **KAMALA HARRIS** 46%

July 21 - 23, 2024

More than two-thirds (69%) of global respondents notice food shrinkflation.

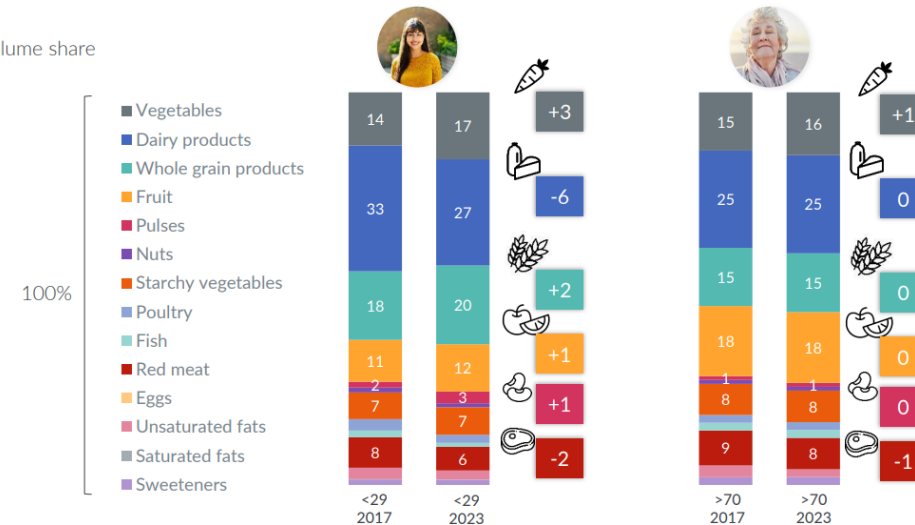**Within a few years remarkable change in young shoppers' diet**
Holistic lifestyle change, closely connected with healthy living

Volume share

	<29 2017	<29 2023		>70 2017	>70 2023	
Vegetables	14	17	+3	15	16	+1
Dairy products	33	27	-6	25	25	0
Whole grain products	18	20	+2	15	15	0
Fruit	11	12	+1	18	18	0
Pulses	2	3		1	1	
Nuts						
Starchy vegetables	7	7	+1	8	8	0
Poultry						
Fish						
Red meat	8	6	-2	9	8	-1
Eggs						
Unsaturated fats						
Saturated fats						
Sweeteners						

7/26/2022   © CPS GfK   34

2 Methodology

Overview

Sample

- 6.000 households
- Representative for the BE population

Scanning

- Via YouGov Shopper app
- Ticket information: Where? When? Amount?
- Product information via EAN code or dialog: Units? Price?

Coding & Quality

- Identifying and coding EAN codes
- Quality control
- Validating purchases

Analysis

- Analyzing data
- Creating reports
- Presenting results
- Answering business questions

Sample

Representative &
continuous

Gross Sample

- 6.000 households

Stratified Sample

- Age main responsible for purchase
- Size household

Also weighted on

- Region
- Size town
- Presence of children <3y

Population

- 5.170.000 households in 2024

How do panel members register their purchases?

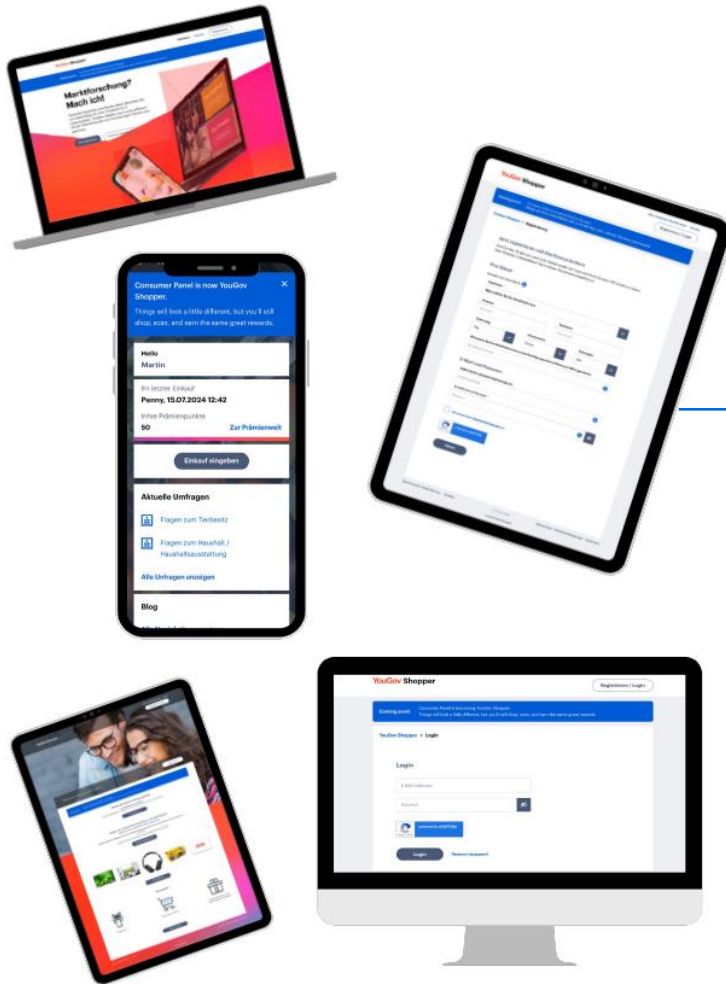## YouGov Shopper app

Trip

- Who?
- Where?
- When?
- Total amount?
- Loyalty card?
- Picture of ticket?

Product

- Scanning each individual product
- Units?
- Price per Unit?

End

- Check & correct purchases

What motivates panel members?

Having influence

Loyalty rewards

Scanning FMCG purchases

for
In-home Consumption

Out of Home,
On the go, …

bought by
Private Belgian Households

Companies, Horeca, Institutions, Tourists, Foreigners, …

COVERED	NOT COVERED
NOT COVERED	NOT COVERED

Data collection & quality control

... in an average week this means

- 11.500 trips
- 120.000 products

> 875 new products, that need to get coded in our systems

Coding of new products

With relevant features depending on the product category

8711327374904

unique product code (SKU)

manufacturer code (Unilever)

produced in the Netherlands

YouGov

Continuous reporting of shopping behavior, based on a representative sample

WHO?

buys…   **WHAT?**   **WHERE?**   *…for* **HOW MUCH?**

And we complete the 'why' to the 'buy'

What is bought

What is thought

3   From data to insights

Main Key Performance Indicators (KPI's)

Main Key Performance Indicators (KPI's)

Penetration (%)

22% of BE households purchase Fanta TM

+4,3% buyers

Relative number (%) of HH buying the item at least one time in the considered period.

Main Key Performance Indicators (KPI's)

Frequency
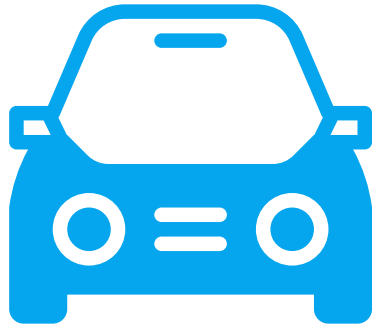
On average 3,2x per year

+6,5% more frequently

Average number of occasions the item has been bought in the considered period.

Main Key Performance Indicators (KPI's)

Volume per Trip

And on average 3,54 L per shopping trip

+8,8% basket size increase

Average volume in L or Kg of the item being bought per occasion in the considered period.

Which brand is selling most volume?

These KPI's determine your marketing strategy

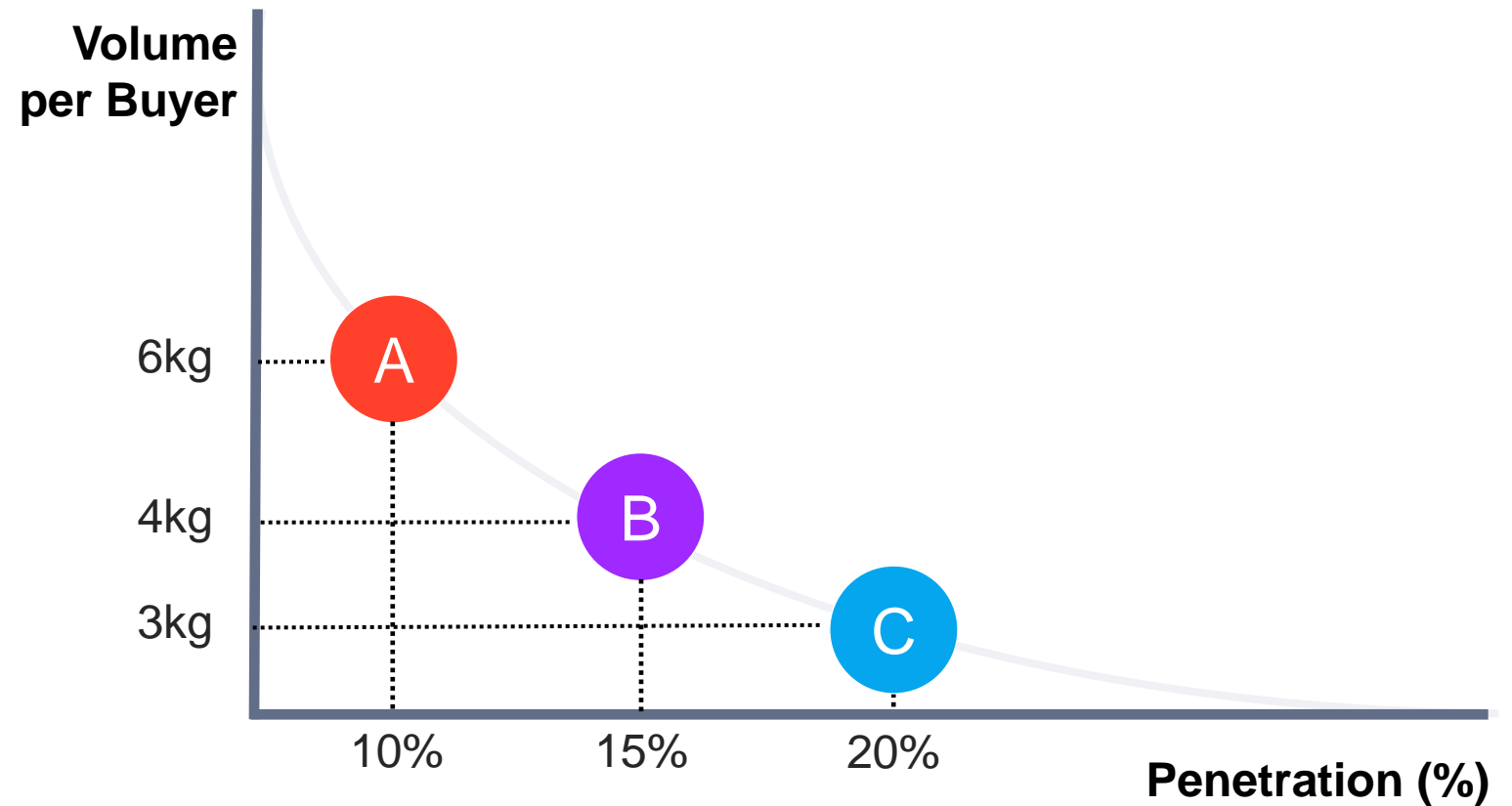## Don't forget to benchmark

Which marketing strategy should these brands follow to increase their sales volume?

Fruit-based sparkling, MAT Aug 2024
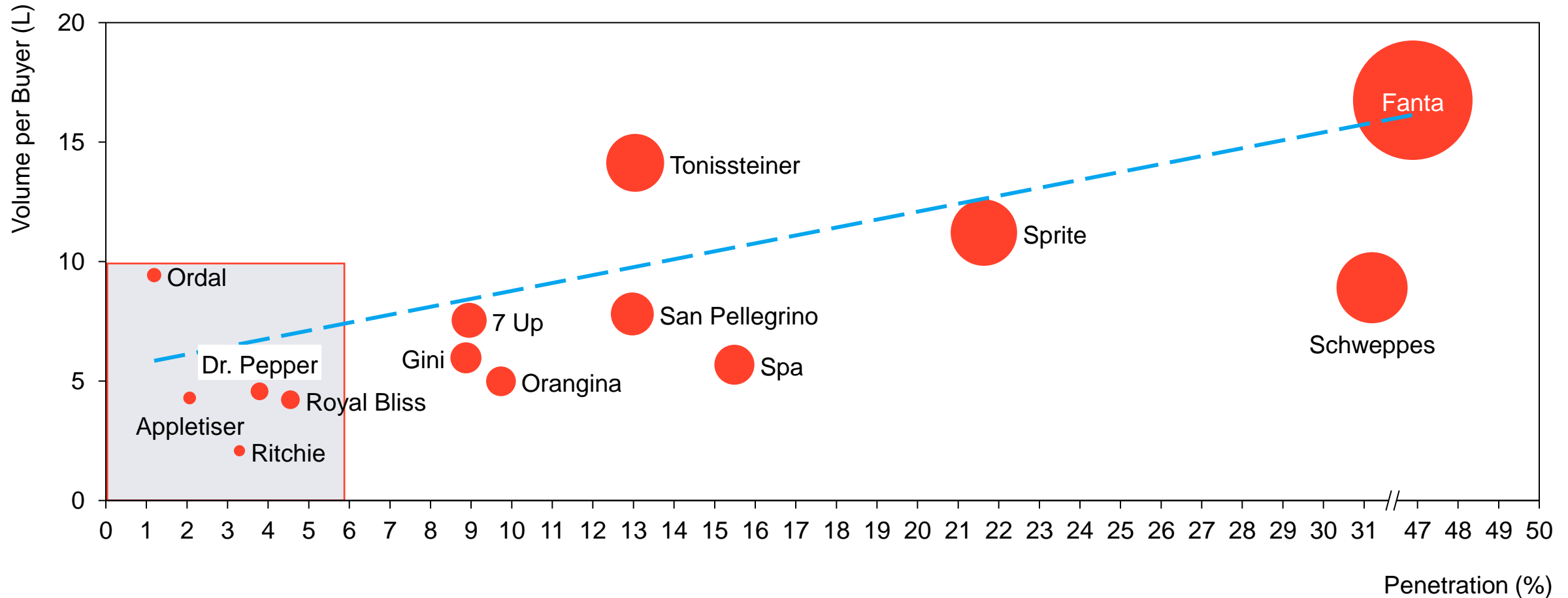
Strategies to increase volume

Volume

Penetration (%)   Volume per Buyer
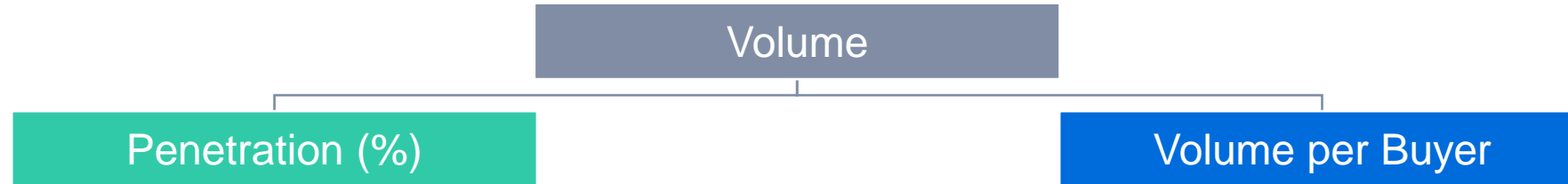
- Increase **brand awareness**

- Increase penetration of the **category**

- Increase **distribution**

- **Recruitment promotions** (trial)
  - Coupon
  - Sample
  - Price reduction
  - Promotion Stand in the point of sales

- **Innovations** in the **product range**

- Increase of the **volume per purchase trip**
  - Bigger format
  - Single → multi pack

- Increase the buying **frequency** (via repeat promotions or stimulating loyalty)

- **Intensification promotions**
  - Multi pack
  - Bigger format

- Increase of **product range**

4 Where to find which insights?

Worldpanel Online

Basic KPI's (incl. retail data) & demographics are all available on **Worldpanel Online**.

Worldpanel Online (WPO)

- Delivery platform of Europanel for accessing YouGov & Kantar consumer panel KPI's

- Monthly updates of KPI's

- Quarterly updates of Shopper Demographics

  www.worldpanelonline.com

Welcome to Europanel's delivery platform
Your single access point to local and global data

Powered by GfK and Kantar Worldpanel

europanel™

Welcome

Hello Karel De Ridder, welcome back
Click here to logout

Worldpanel Online (WPO)

Harmonized Cubes	Local Cubes: XX – Coca-Cola
■ Similar content & setup cross country ■ Available for NARTD, SSD, JJD, PW, S&E, RTD Coffee □ Beware: no juices data anymore for BENE ■ Top level information: Categories, Segments and Brands > Ideal for multi country projects	■ Country specific setup, based on CCEP input ■ Full NARTD item list, cross segment ■ Detailed information: Categories, Segments and Brands, but also Flavors, Pack Sizes, … ➢ Ideal for detailed country-specific projects

PITA Report & Innovation Tracker

Additional monthly reports are delivered through Powerpoint & Consumer Insights Visualizer (CIV):

- PITA Report

- Innovation Tracker (CIV)

  ➢ civ.gfk.com

5   Some of our special analyses

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

YouGov
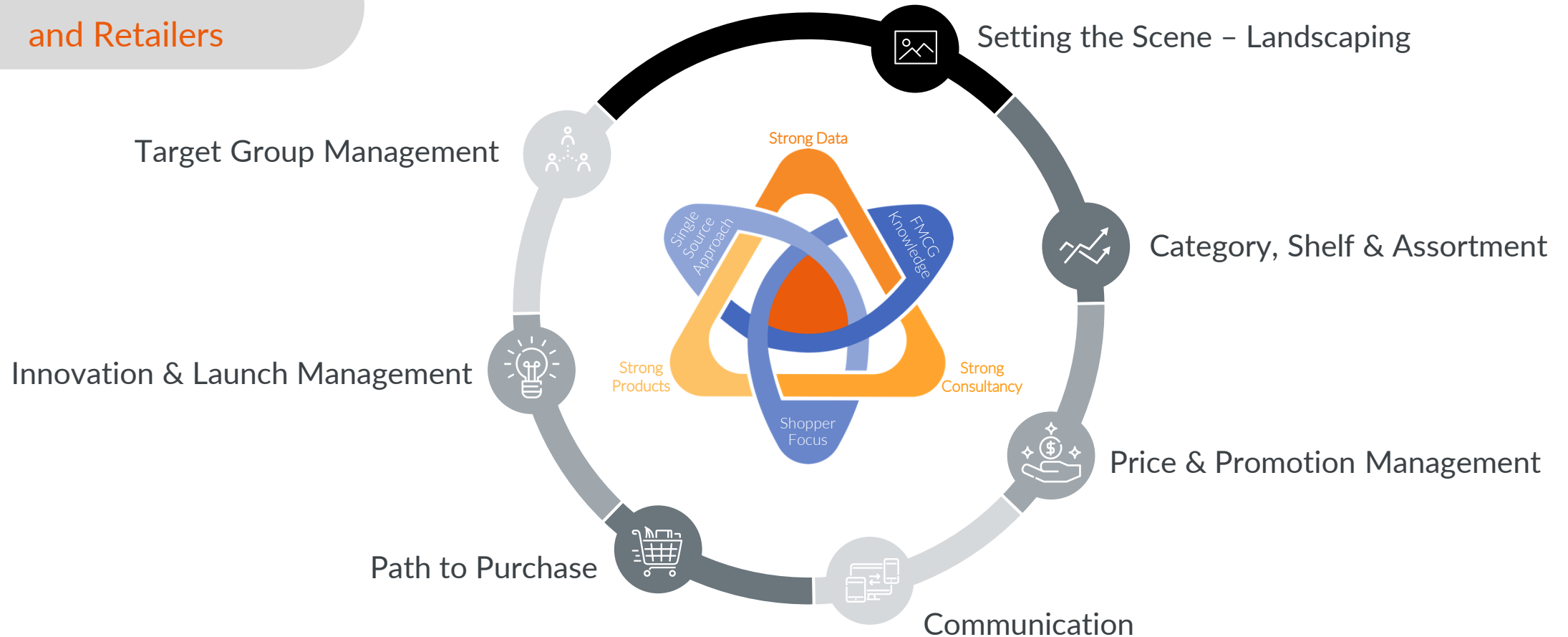
5.1

Gain & Loss

"Where is volume/value coming from/going to?"

Which business questions are answered?

Gain & Loss

- From/To which competitor is an item winning/losing?

- Is the gain/loss more than expected?

- Is the gain/loss happening on continuous basis?

- Is a new item adding increased volume to the category? Or is it just stealing from competitors or cannibalizing on its own products?

Which business questions are answered?

Example: Monster TM, Volume (000 L) evolution

	Volume (000 L)
5.708,8	**Change:**
MAT Nov 2022	**365,7**
	6,4%

		-272,9		52,0		586,5		6.074,5
MAT Nov 2022	New / Lost Category Buyers		Item Intensity Change		Added To / Dropped From Repertoire		Switching between Items	MAT Nov 2023

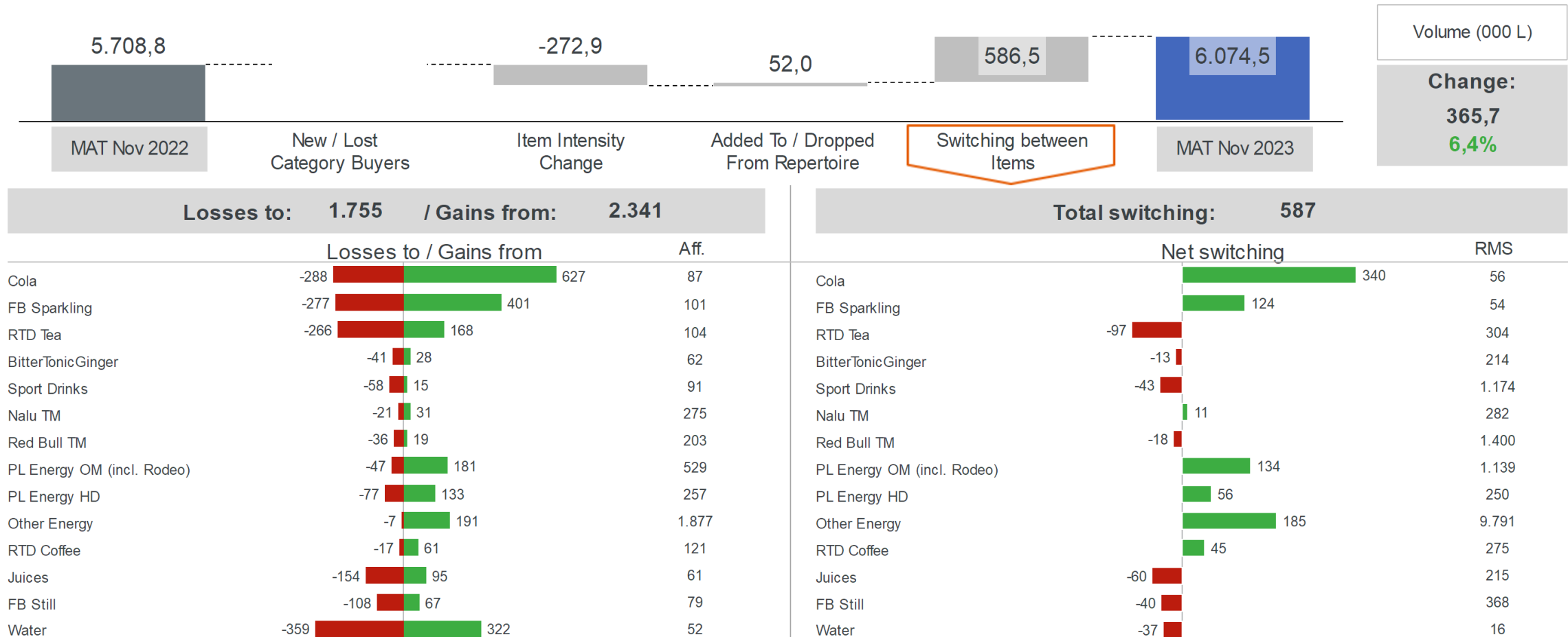| Losses to:	1.755	/ Gains from:	2.341		Total switching:	587

	Losses to / Gains from	Aff.		Net switching	RMS
Cola	-288 / 627	87	Cola	340	56
FB Sparkling	-277 / 401	101	FB Sparkling	124	54
RTD Tea	-266 / 168	104	RTD Tea	-97	304
BitterTonicGinger	-41 / 28	62	BitterTonicGinger	-13	214
Sport Drinks	-58 / 15	91	Sport Drinks	-43	1.174
Nalu TM	-21 / 31	275	Nalu TM	11	282
Red Bull TM	-36 / 19	203	Red Bull TM	-18	1.400
PL Energy OM (incl. Rodeo)	-47 / 181	529	PL Energy OM (incl. Rodeo)	134	1.139
PL Energy HD	-77 / 133	257	PL Energy HD	56	250
Other Energy	-7 / 191	1.877	Other Energy	185	9.791
RTD Coffee	-17 / 61	121	RTD Coffee	45	275
Juices	-154 / 95	61	Juices	-60	215
FB Still	-108 / 67	79	FB Still	-40	368
Water	-359 / 322	52	Water	-37	16

Sources of change

Gain & Loss

Change in Value or Volume P2 vs P1

Competitive part	Non-Competitive part

| Switching between items | New/Lost Category Buyers | Increased/Decreased Category Buying |

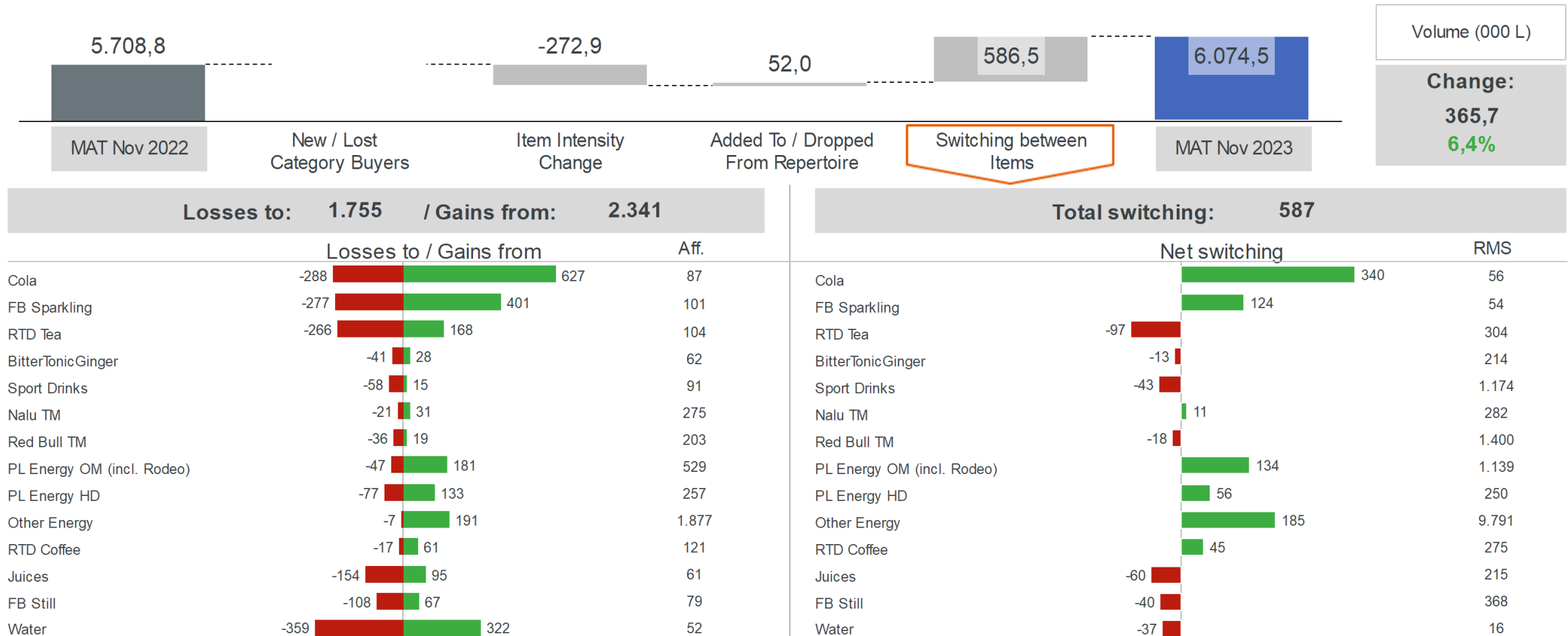| Item Intensity Change | Added to/Dropped from Repertoire |
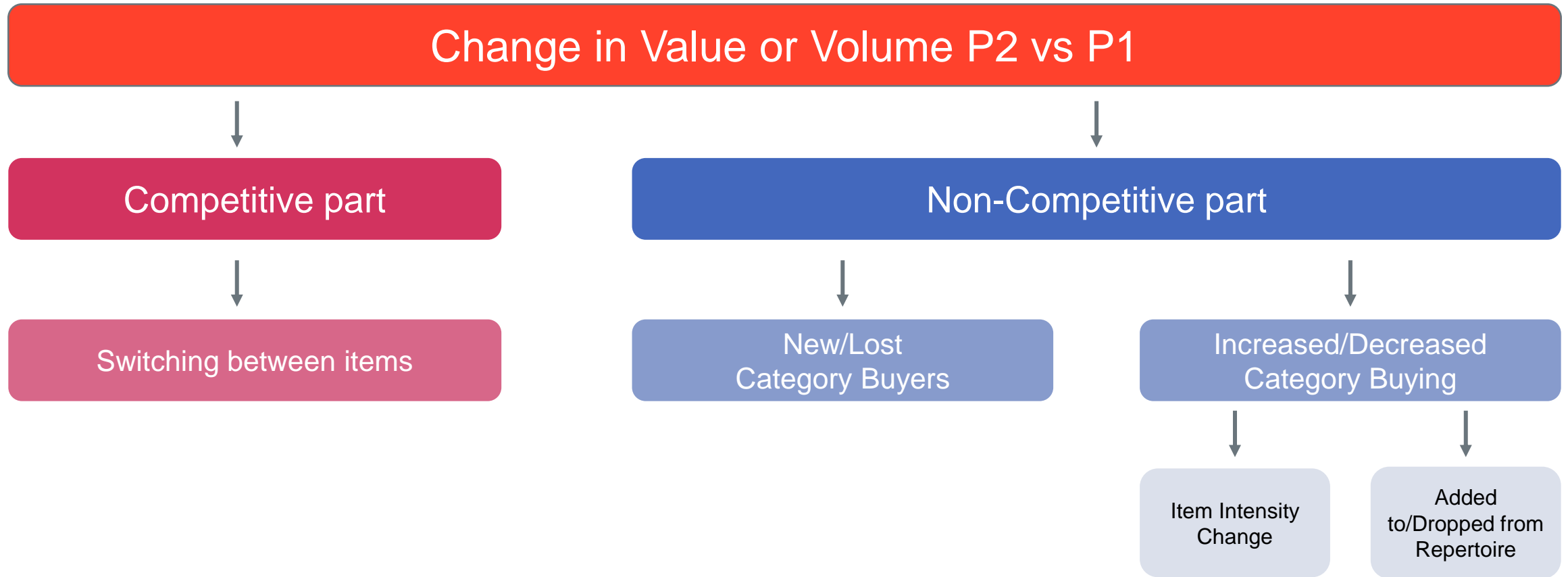
Which business questions are answered?

Example: Monster TM, Volume (000 L) evolution

5.2

New-Lost-Retained

"How many buyers are lost/new for a brand?"

"Where are these buyers coming from/going to?"

Which business questions are answered?
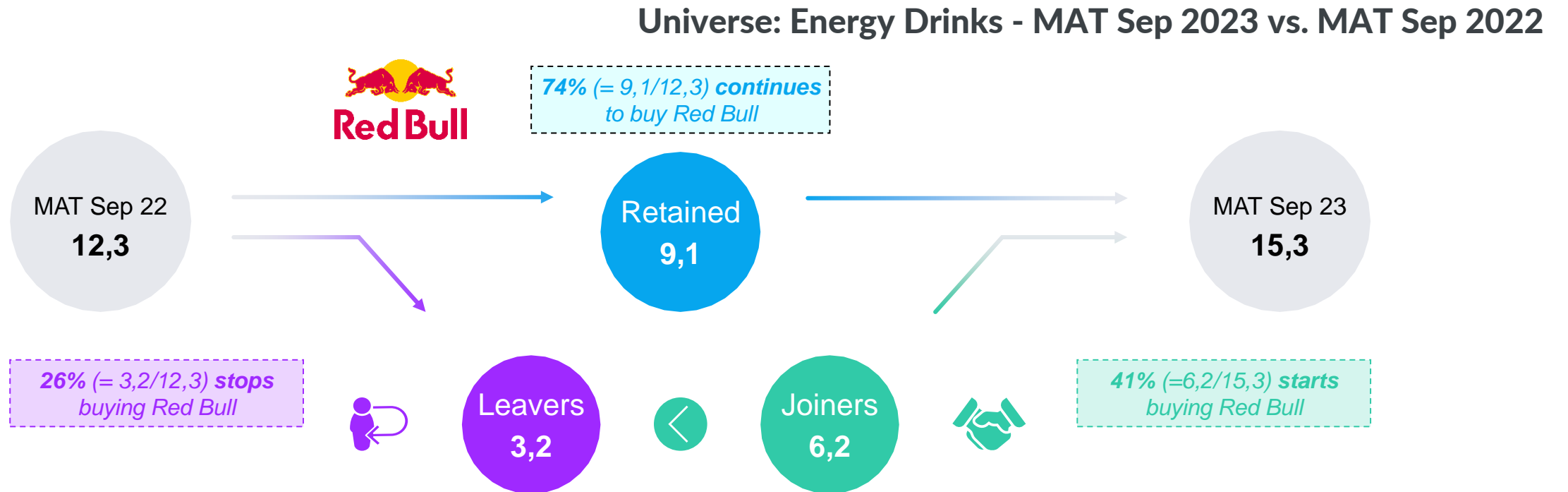
New-Lost-Retained

- What is the breakdown of a brand's (or other item's) buyer base in terms of repeat, new, and lost buyers?

- How has purchase behavior changed across 2 periods for new, lost, and retained buyers?

  > Are they also new for or leaving the category?

  > In what ways do buyers shift their loyalty between the items and other category purchases?

- What demographic characteristics define new, lost, and retained buyers in the context of the brand's customer base?

Analyzing KPI's

New-Lost-Retained

Over the course of 2 years (BIMAT September 2023) Red Bull reaches 18,5% of the BE population.
These buyers get split up into 3 groups:

Universe: Energy Drinks - MAT Sep 2023 vs. MAT Sep 2022

74% *(= 9,1/12,3)* **continues** *to buy Red Bull*

MAT Sep 22
12,3

Retained
9,1

MAT Sep 23
15,3

26% *(= 3,2/12,3)* **stops** *buying Red Bull*

Leavers
3,2

Joiners
6,2

41% *(=6,2/15,3)* **starts** *buying Red Bull*

Analyzing KPI's

New-Lost-Retained

Changing purchased behavior gets analyzed for the item itself for all 3 groups of buyers, comparing 2 periods.

Penetration
18,5%

12,3%	15,3%
P1	P2

Red Bull
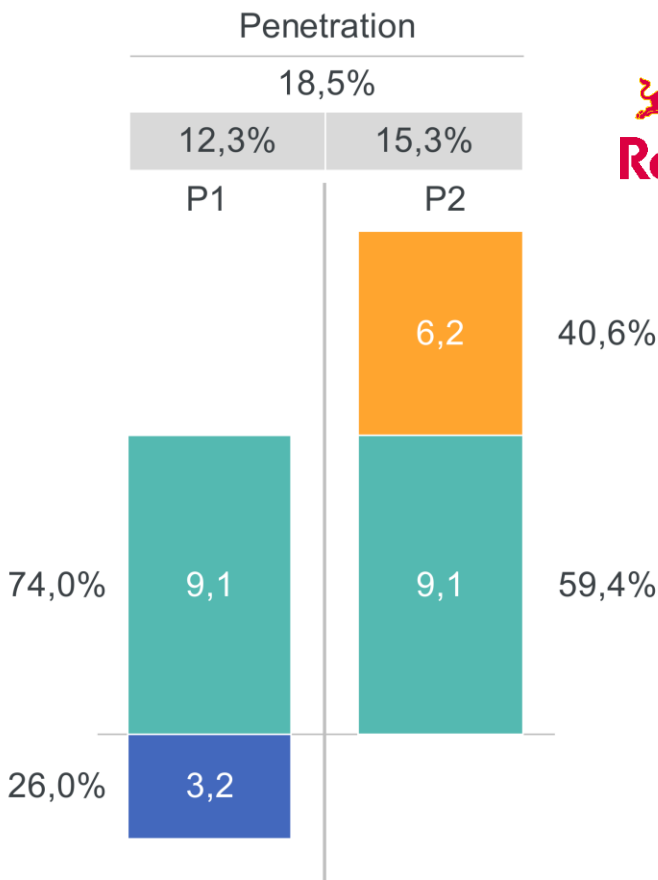
Universe: Energy Drinks - MAT Sep 2023 vs. MAT Sep 2022

	Volume per trip		Frequency		Volume per buyer		Loyalty Volume	
	P1	P2	P1	P2	P1	P2	P1	P2
🟧 New Buyers		0,93		1,8		1,71		10,2
🟩 Repeat Buyers	1,27	1,10	9,0	10,0	11,45	11,01	26,2	26,2
🟦 Lost Buyers	1,10		1,9		2,12		6,6	

Chart values:
- 40,6% / 6,2 (New, P2)
- 74,0% / 9,1 (Repeat, P1); 59,4% / 9,1 (Repeat, P2)
- 26,0% / 3,2 (Lost, P1)

Analyzing Duplication

New-Lost-Retained > What else do NLR Red Bull buyers purchase?

Share	Lost Buyers		Repeat Buyers		New Buyers	
	P1	P2	P1	P2	P1	P2
Loyalty	6,6		26,2	26,2		10,2
Volume (000 L)	343,3		5.278,6	5.077,1		538,5
Penetration	3,2		9,1	9,1		6,2

YouGov

5.3

Combination Analysis

"What are certain buyers also/not purchasing?"

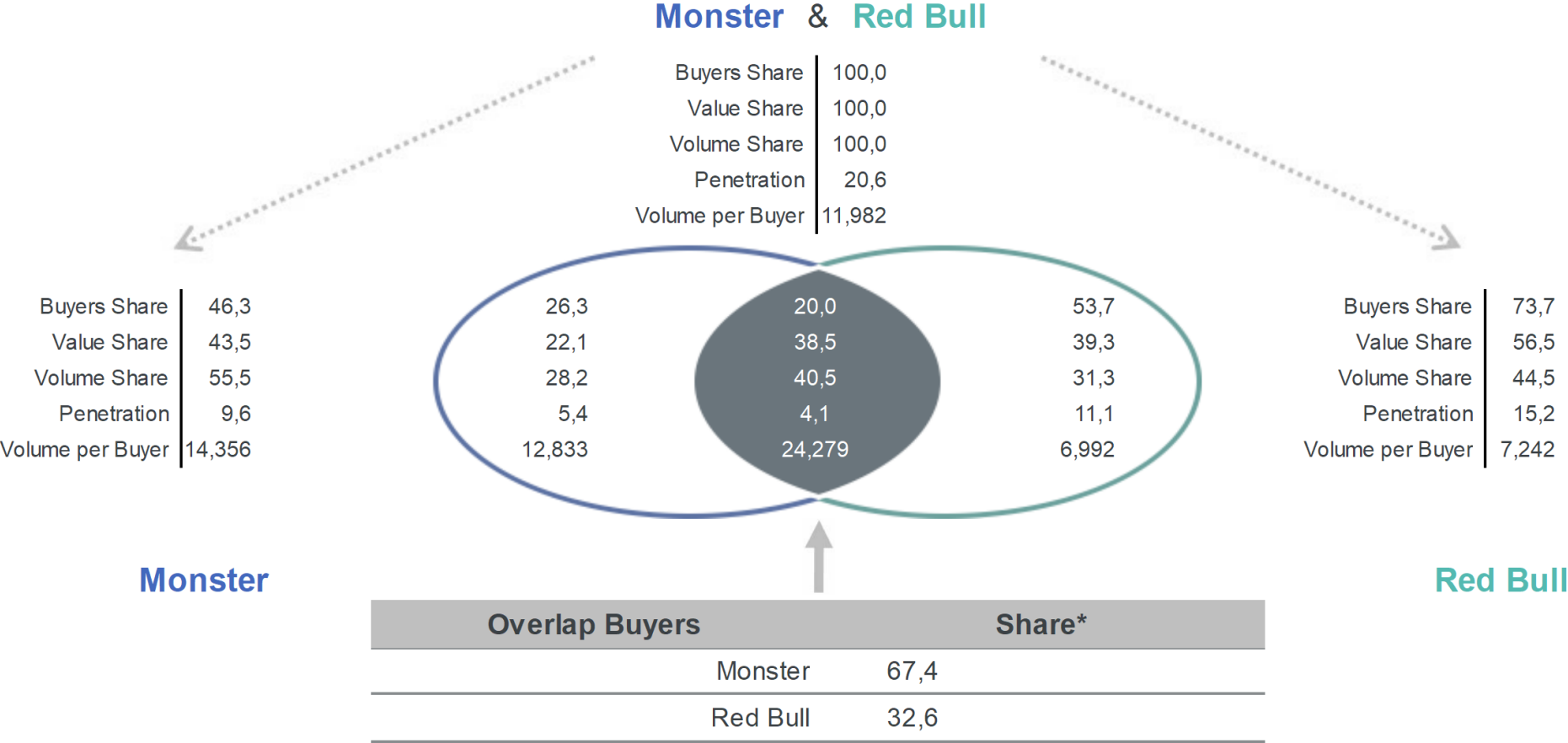# Which business questions are answered?

Combination Analysis

- To which extent is my buyer also buying my main competitor?

- Does the buyer of one flavor/format/pack type also buy the others?

- Which formats attracts the most exclusive buyers?

Understanding KPI's
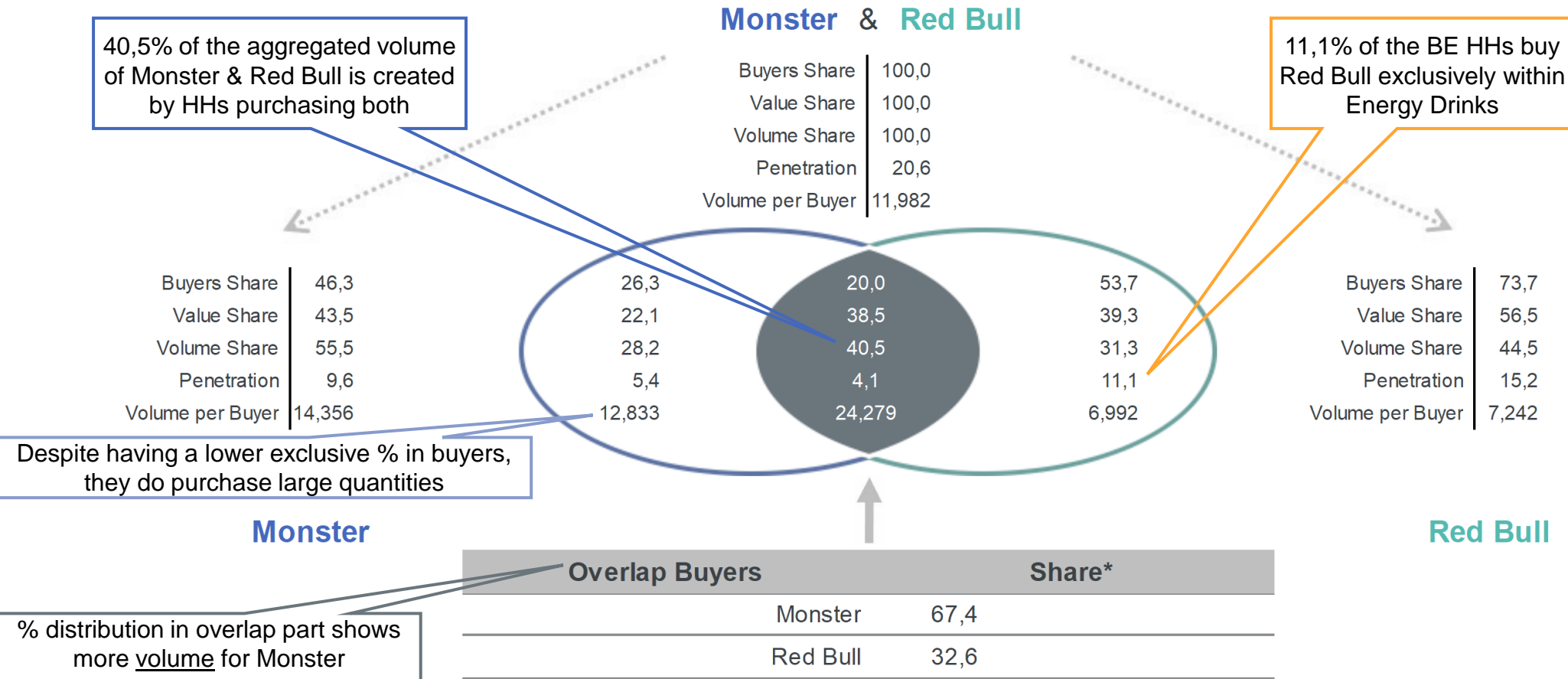
Combination Analysis – Energy Drinks

MAT Sep 2023

Monster & **Red Bull**

Buyers Share	100,0
Value Share	100,0
Volume Share	100,0
Penetration	20,6
Volume per Buyer	11,982

Buyers Share	46,3	26,3	20,0	53,7	Buyers Share	73,7
Value Share	43,5	22,1	38,5	39,3	Value Share	56,5
Volume Share	55,5	28,2	40,5	31,3	Volume Share	44,5
Penetration	9,6	5,4	4,1	11,1	Penetration	15,2
Volume per Buyer	14,356	12,833	24,279	6,992	Volume per Buyer	7,242

Monster   **Red Bull**

Overlap Buyers	Share*
Monster	67,4
Red Bull	32,6

*Basis: Volume tot. (000 L/tonnes)

Understanding KPI's

Combination Analysis – Energy Drinks

MAT Sep 2023

Monster & Red Bull

40,5% of the aggregated volume of Monster & Red Bull is created by HHs purchasing both

11,1% of the BE HHs buy Red Bull exclusively within Energy Drinks

Buyers Share	100,0
Value Share	100,0
Volume Share	100,0
Penetration	20,6
Volume per Buyer	11,982

Buyers Share	46,3	26,3	20,0	53,7
Value Share	43,5	22,1	38,5	39,3
Volume Share	55,5	28,2	40,5	31,3
Penetration	9,6	5,4	4,1	11,1
Volume per Buyer	14,356	12,833	24,279	6,992

Buyers Share	73,7
Value Share	56,5
Volume Share	44,5
Penetration	15,2
Volume per Buyer	7,242

Despite having a lower exclusive % in buyers, they do purchase large quantities

Monster

Red Bull

% distribution in overlap part shows more <u>volume</u> for Monster

Overlap Buyers	Share*
Monster	67,4
Red Bull	32,6

*Basis: Volume tot. (000 L/tonnes)

Is the launch attracting additional buyers?

Combination Analysis – Energy Drinks

Penetration (%) – Nalu – Rolling MAT's

"Is the launch successful for Nalu?"

		Nalu - New Flavors*
		Mixed Buyers
		Nalu - Excl. New Flavors
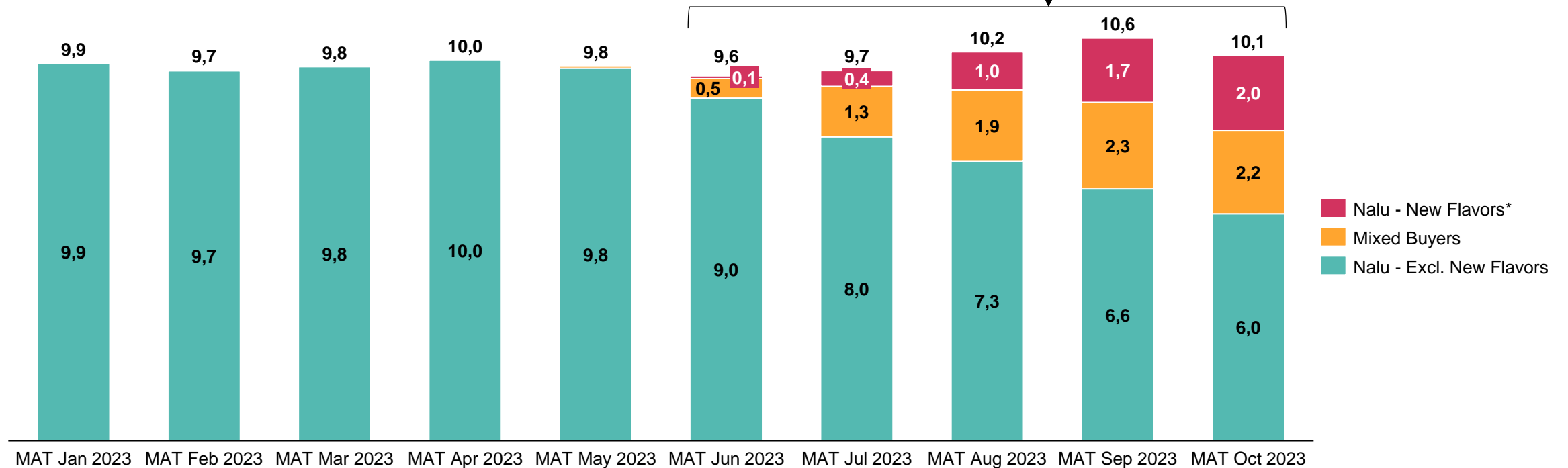
Basic KPI's & Special Analyses

ANALYSIS	Available on WPO?	GfK (BENE)
Basic KPI's	✕	✕
Retail Data	✕	✕
Demographics	✕	✕
Gain & Loss and Source of Business		✕
Buyers Movement		✕
Entry Study		
Mixity Analysis & Duplication		✕
Assortment Optimization		✕
Heavy-Medium-Light, Loyalty, Frequency, …		✕
Dispersion		✕
Brand Switching		✕

▪ Servicing for these special analyses is included in the collaboration in BENE, limited to basics & support in SE

▪ Definitely not necessary to ask for a specific analysis: just share the business question

Get in touch with us!

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Thank you

YouGov

business.yougov.com

Memorandum - Belgium

Sample Structure

The household panel is designed as a stratified sample drawn from the population of private households in Belgium. The stratification considers the household criteria 'age of the reference person' and 'household size'.

The structure of the sample is based on the principles of optimal allocation.

Weighting Procedure

For reporting purposes, the resulting net reporting samples are weighted. The weighting procedure is based upon the design of the disproportional stratified sample. Variables considered in this procedure are:

- household size;
- age of the reference person;
- district;
- size of the municipality;
- presence of children below 3 years old.

Data on the structure of the target population are updated annually based on information from Statbel, the Belgian statistical office.

Moreover, the method of response weighting is applied to compensate for missing shop visits in the actual scanned purchase behavior. Improving trip coverage is based upon the combination of trip size and age of the reference person.

Data Collection

Panel members register their domestic purchase behavior regarding a defined range of FMCG products, regardless the outlet of purchase.

Registration of purchase behavior is done via the YouGov Shopper smartphone app, which transmits the registered data to the research center.

Projection

Data are levelled up from sample size to population size to become estimates for markets at a national scale. The development of the population size is taken into account to make these estimates.

For every reporting period within a specific year, the population size is fixed to the expected number of households within that year. Based on updated time series, we expect about 5.170.000 private households in Belgium by 31/12/2024.