




WHO? WHERE? WHY? WHEN?

OUR PRECISE HOUSEHOLD SEGMENTATION.






Update based on MAT Sep 2021 – 9. February 2022

GfK GREYshopper

What you can expect today

1. Why a household segmentation?
2. What did we do?
3. Our precise HH segments: Who are they? How do we use them?
4. Changes of the HH segment since 2019 (COVID impact & longterm Trends)
5. How to Access Data and Analysis






Why a household segmentation?






Coca-Cola

GfK GREYshopper

WHY HOUSEHOLD SEGMENTATION?

- BETTER **UNDERSTANDING** AND **HOLISTIC PICTURE** OF MARKET AND OUR **CONSUMER BASE**
- BEYOND PURE DEMOGRAPHICS – **BEHAVIOURAL TARGETING**
- HELP TO FIND AND PRIORITIZE **GROWTH OPPORTUNITIES** AND IMPROVE **KO RECRUITMENT STRATEGY**

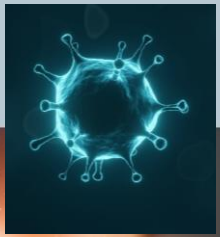
WHY UPDATE NOW?

Both internal as well as external variables changed and technology enabled us to experiment with new analytical approaches

INTERNAL

We have advanced our own growth strategy to a much **broader & more differentiated NARTD focus.**

EXTERNAL



The world is changing:
We are seeing significant trend changes in the markets - be it sustainability, premiumization, renaissance of glass/GAMs/RR, struggle of Discounters, etc. ... Traditional target groups getting more and more blurred.
We wanted to understand how all these factors materialize in the decision making & segmentation of shoppers.

TECHNOLOGY

Big data approaches enabled us to throw a plethora of different variables (values, beliefs, socio-demographics, shopping behavior, ...) at "the computer" to tell us which segmentation explains NARTD consumption best

SO WE ADVANCING OUR HH SEGMENTATION FROM A SOCIO-DEMOGRAPHIC TO AN ATTITUDINAL & BEHAVIORAL SEGMENTATION

SOCIO-DEMOGRAPHIC SEGMENTATION

LIFESTAGE

INCOME

	Young Singles	Young Couples	Families	Older Couples	Older Singles
Age HH Size	< 49 Y 1 Person	< 49 Y 2 Persons	with kids < 18 Y in HH	50 Y + 2 Persons	50 Y 1 Person
Lower Income	< 1.500 €	< 2.000 €	< 2.500 €	< 2.000 €	< 1.500 €
Higher Income	≥ 1.500 €	≥ 2.000 €	≥ 2.500 €	≥ 2.000 €	≥ 1.500 €

ATTITUDINAL & BEHAVIORAL SEGMENTATION



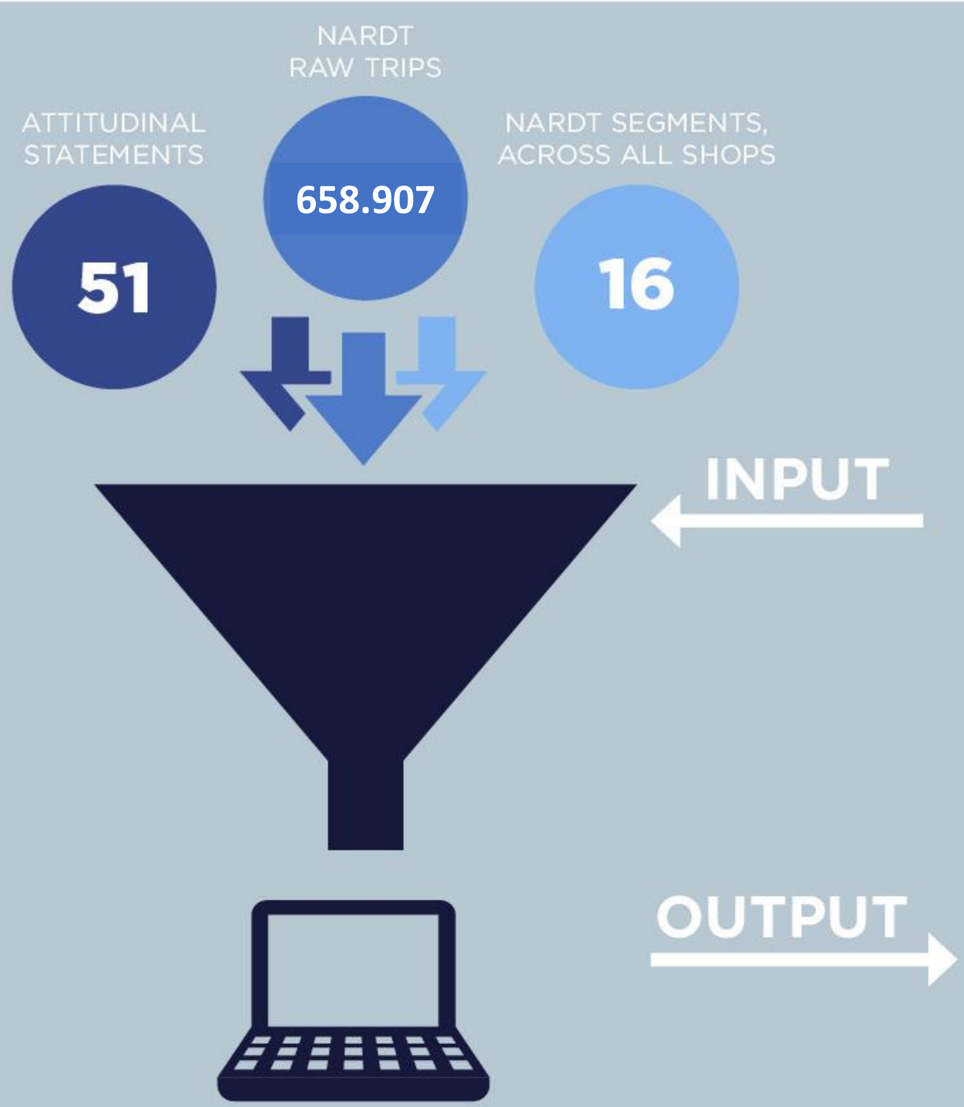



What did we do?






HOW WE DID THIS



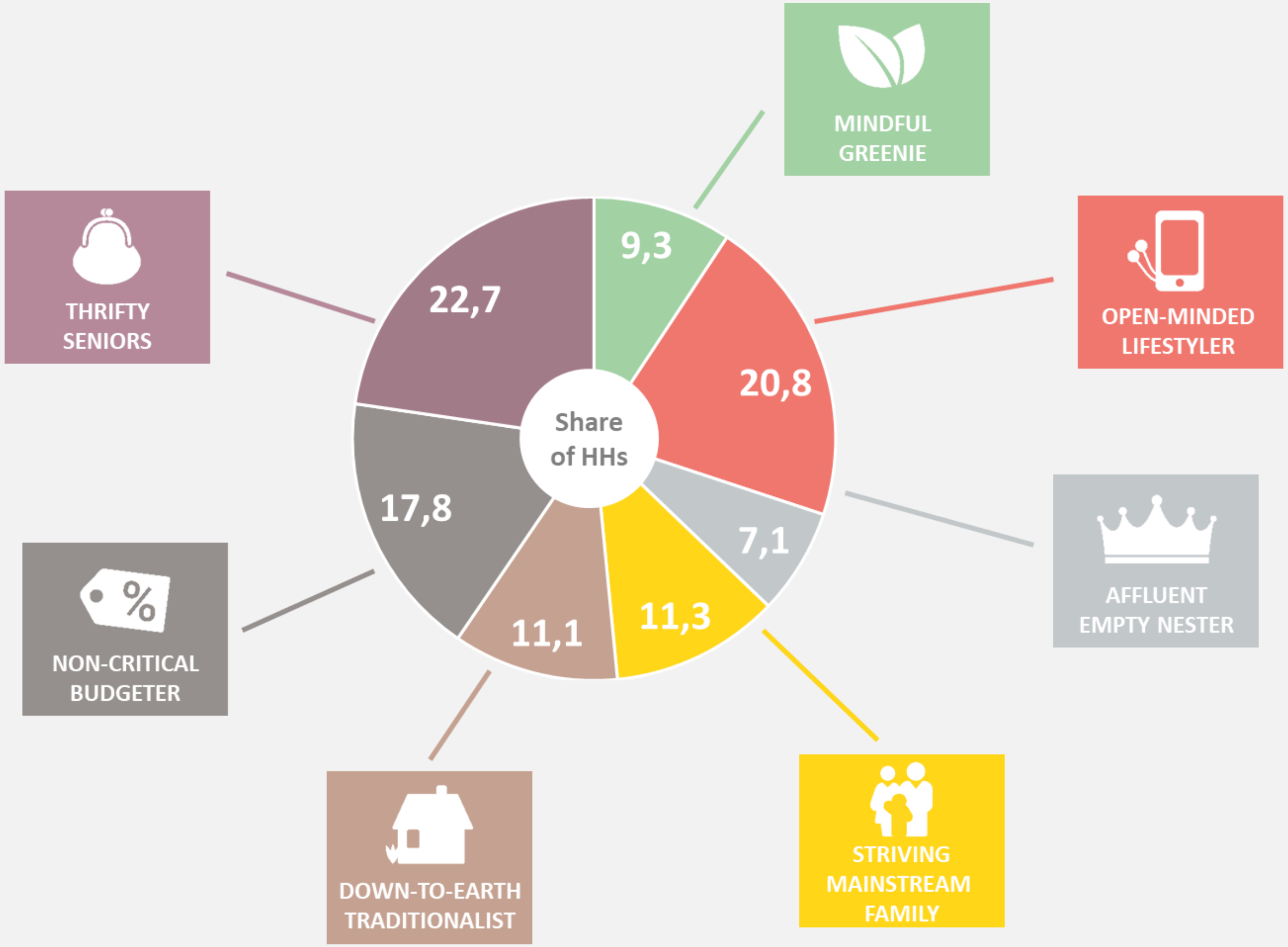
GENERAL SHOPPING BEHAVIOR
- Shopping Trips
- Small/Large Baskets
- NARTD Basket Inci-dence
- NARTD Frequency
- NARTD Vol/Trip
- Promo Affinity

NARTD PURCHASE BEHAVIOR
- Categories
- Price Ranges: Premium, Brands, PLBs
- Organic
- Better World
- Innovations
- Reg / light
- IC / FC
- Purchase Channel
- Packages

ATTITUDES
- Innovation
- Hedonism
- Eco (Organic, Fair Trade, Environment)
- Regionality
- Health, Weight
- Ingredients
- Convenience(AfH, Shopping, Cooking)
- Spontaneity
- Service
- Brand Orientation
- Price Orientation

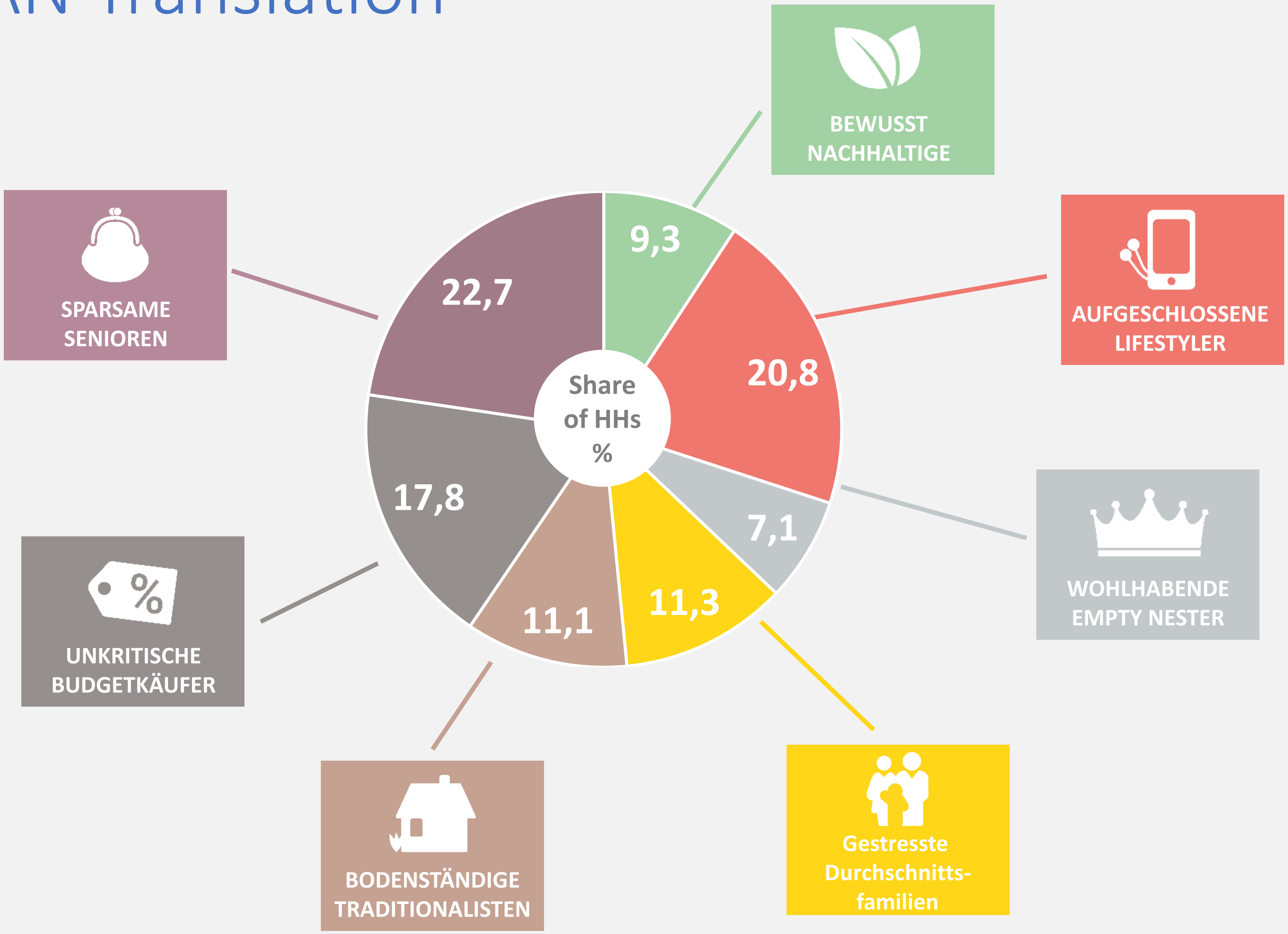
DISTINCT HH CLUSTER WITH UNIQUESHOPPING BEHAVIOR & MINDSET
(max. homogeneity within & max. differentiation between the clusters)

We have identified 7 distinct household segments

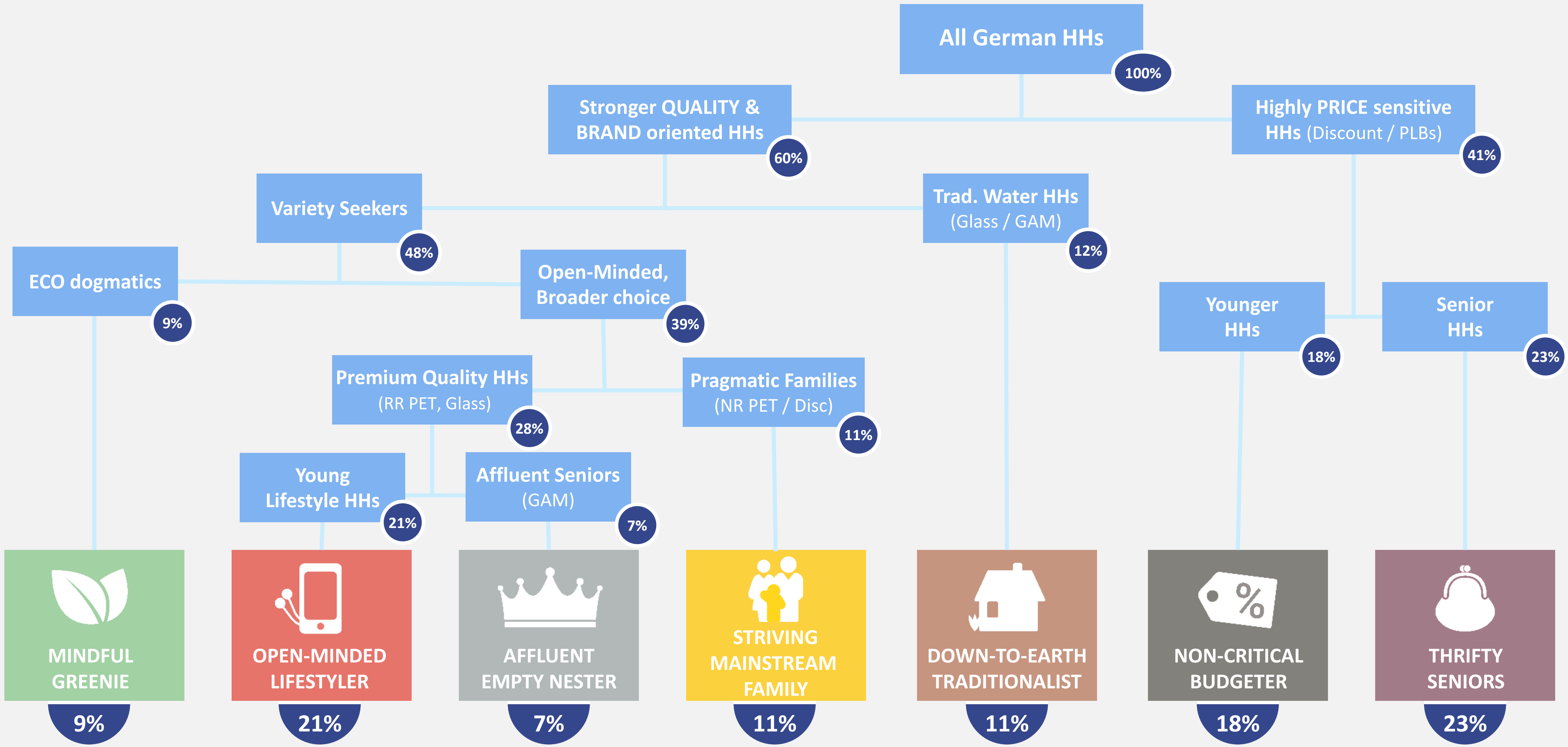


. . . and made them really tangible for our colleagues

GERMAN Translation



Most differentiating features



A little Quiz – what Segment has the highest index for that KO product?

Solution at the end of the presentation – stay tuned and give us your Best Guess in the chat! ☺

???

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MINDFUL GREENIE

OPEN-MINDED LIFESTYLER

AFFLUENT EMPTY NESTER

STRIVING MAINSTREAM FAMILY

DOWN-TO-EARTH TRADITIONALIST

NON-CRITICAL BUDGETER

THRIFTY SENIORS


Our precise HH segments: Who are they? How do we use them?


Coca-Cola

GfK GREYshopper

MINDFUL GREENIE

Households

9,3%

QUALITY-ORIENTED

SUSTAINABILITY

FAIR TRADE

JUICES & SPRITZERS

ORGANIC

SPORTIVE

HEALTH-CONSCIOUS

INTERNET / RADIO

WHOLEFOOD SHOP

MINDFUL GREENIE

SHOPPING BEHAVIOR

FMCG Shopping Trips per Week
4,0 *(Index 92)*

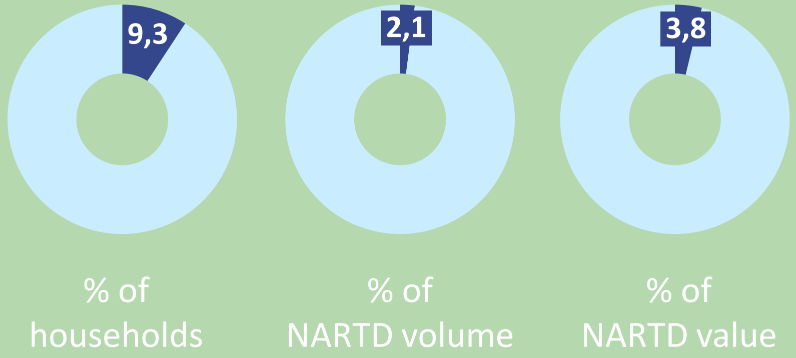
NARTD Spend per HH & Year
106 EUR *(Index 41)*

NARTD Basket Incidence
13,4% *(Index 58)*

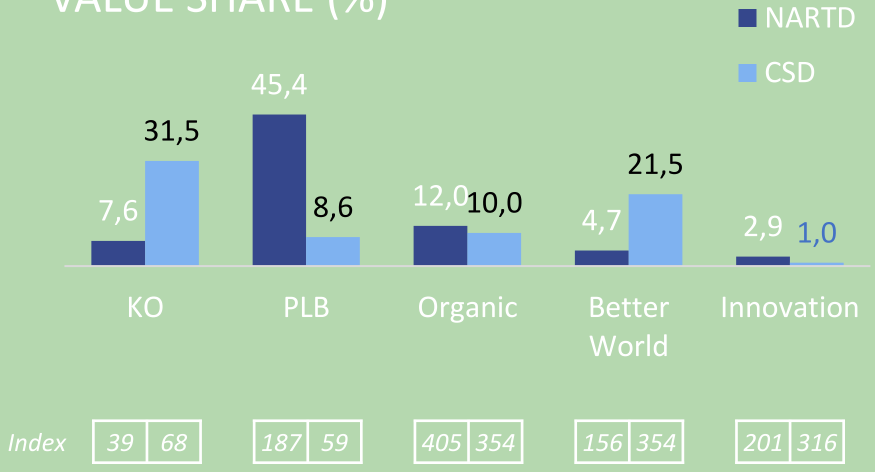
% Small Baskets
34,2% *(Index 78)*

% NARTD Value on Promo (in branded)
8,4% *(Index 46)*

SEGMENT RELEVANCE



VALUE SHARE (%)



NARTD CATEGORIES
(% Value Share)

		Index
Traditional CSD	14,0	45
Spritzers	1,0	51
Bitters/Mixers	2,8	142
Water Sparkling	3,8	20
Water Still	1,7	23
Juice (Drinks)	68,7	349
Other NARTD	8,0	42

NARTD CHANNELS
(% Value Share)

Supers	34,7	99
Hypers	9,2	68
Discount	41,8	119
Drugstore	2,2	341
Bev Shops	3,3	33
Organic Supers	1,2	437
Online	3,6	128
Other	4,0	144

CSD PACKS
(% Value Share)

Glass	39,3	249
Can	7,2	122
PET NR	38,2	65
PET RR	15,3	77

MINDFUL GREENIE

SOCIO-DEMOGRAPHICS

Lifecycle
All ages, especially strong in seniors

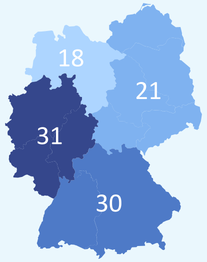
	% of HH	INDEX
Young Singles	21	102
Younger Families	15	**120**
Older Families	8	76
Empty Nesters	29	87
Single Seniors	28	**116**

Financial Situation
Solid financials, but not esp. affluent

	% of HH	INDEX
<0,5k €/HH	2	72
0,5 < 1,0k €/HH	12	88
1,0 < 1,5k €/HH	24	88
1,5 < 2,0k €/HH	23	101
2,0+k €/HH	38	117

Living Environment
> Across whole Germany
> More urban / metropoles
> Owned apartment

	INDEX
North	107
East	100
South	108
West	90



MINDSET

INDEX vs Total HHs

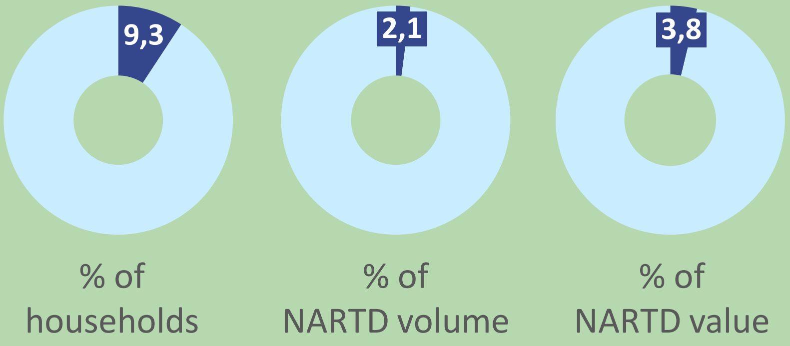
		INDEX
LIFESTYLE	Innovation	97
	Hedonism	98
HEALTH	Health	117
	Weight	117
	Ingredients	155
CONVENIENCE	Eating Out	38
	Conv. Products	91
	Conv. Shopping	102
SUSTAINABILITY BETTER WORLD	Organic	176
	Fair Trade	160
	Environment	140
	Regionaliity	120
SHOPPING ORIENTATION	Service	104
	Quality	132
	Brands	85
	Impulse Purchase	94
	Price	87

MINDFUL GREENIE

SOCIAL DEMOGRAPHICS

- Across all age groups, esp. strong among single seniors 70+, but also younger families
- Highly educated / social class
- Solid financials, but not especially rich
- Living across whole Germany
- More often in urban environments

SIZE OF SEGMENT



GENERAL SHOPPING ATTITUDE

- Conscious shopping, mostly planned
- Preferably in smaller / specialist shops
- Fresh food is important to them
- High ecological standards are key – willing to pay for that
- Often shopping by bike

MIND SET

- Organic & environmental at their heart
- All sustainability topics do strongly matter to them
- Quality & high ecological standards are key, brands & innovations do not matter
- Strongly care about health aspects
- Clean food is crucial for them, rejecting all kinds of additives & artificial ingredients
- Prefer fresh food, no convenience products

LEISURE TIME

- Taking care of themselves:
  - active sports, often close to nature like hiking, cycling, etc.
  - relaxation: yoga, wellness, sauna, etc.

MEDIA HABITS

- Rather low media involvement
- Critical vs. advertising
- Reading a lot

SHOPPING BEHAVIOR

- Generally low FMCG shopping frequency
- Rather large baskets, consciously planned
- Low NARTD basket incidence
- NARTD purchase strongly limited to juice drinks / Spritzer, rarely other categories
- Brands do not matter to them
- Buying premium products or organic PLBs
- Buy in organic-related shops (organic supers, drugstores, local market), but also Discount (broad assortment of organic PLBs)
- Clear preference for glass

OPEN-MINDED LIFESTYLER

Households

20,8%

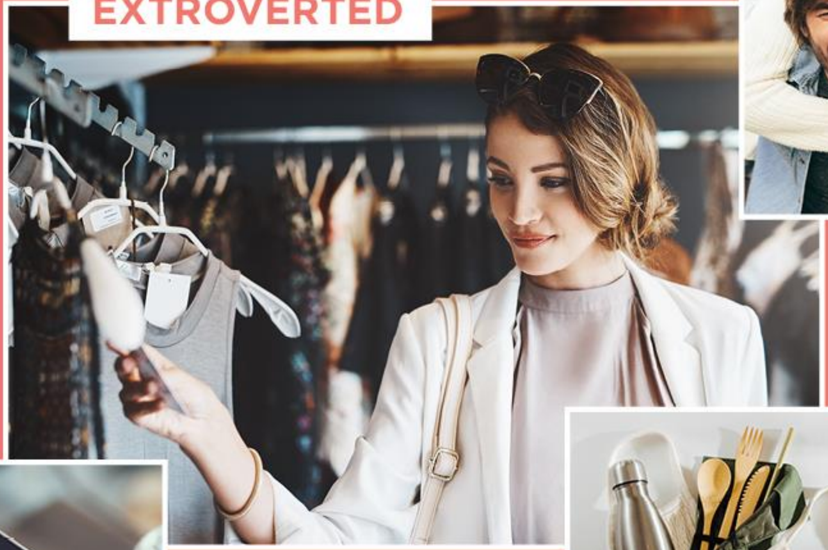
LUST FOR LIFE

FITNESS

ECOLOGY

EXTROVERTED

INTERNET



QUALITY-ORIENTED

BROAD NARTD RANGE

LIFESTYLE NARTDS

SUSTAINABILITY

INNOVATIVE

BRAND-ORIENTED

SUPERMARKET

AFFLUENT EMPTY-NESTER

Households
7,1%

QUALITY-MINDED

SERVICE-ORIENTED

WELL-TRIED

WEALTHY

BRAND-FIXED

SPARKLING WATER &
CLASSIC SOFT-DRINKS

CRATE

GAM

SPORTY

CLASSIC MEDIA

STRIVING MAINSTREAM-FAMILY

Households

11,3%

FLAVORED MAINSTREAM NARTD

ADVERTISMENT

TIME PRESSURE

TIME TOGETHER

INTERNET

PRAGMATICAL

INNOVATION-INTERESTED

CONVENIENCE

BRAND-PRICE-ORIENTED

HYPERMARKET

DOWN-TO-EARTH TRADITIONALIST

Households

11,1%

QUALITY-ORIENTED

SUSTAINABILITY

FRESHNESS

HEALTH

SPARKLING WATER

CLASSIC MEDIA

OUTDOOR ACTIVITIES

WELL-OFF

FAMILY

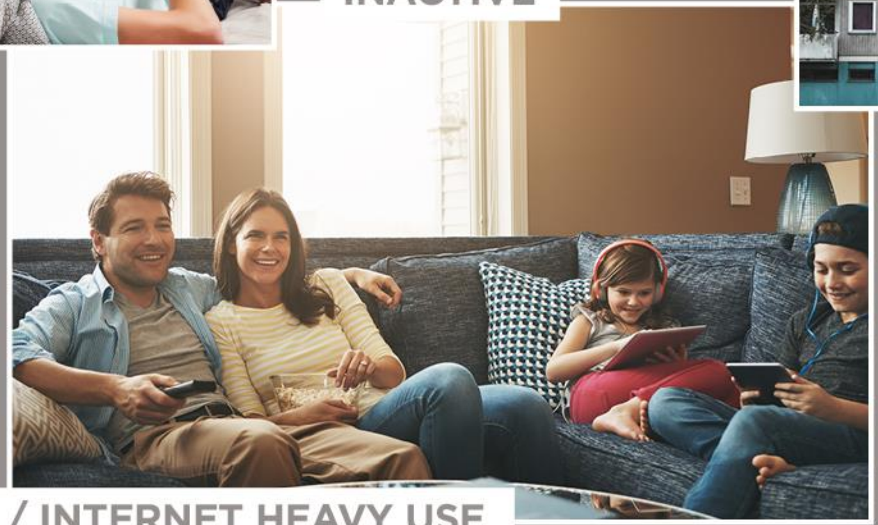
NON-CRITICAL BUDGETER %

Households

17,8%

FLAVORED NARTD

INACTIVE



TV / INTERNET HEAVY USE

STAY AT HOME

FAST FOOD

DISCOUNTER

BARGAIN

CONVENIENCE-ORIENTED

THRIFTY SENIOR

Households

22,7%

BUDGET-MINDED

TRADITIONAL MEDIA

SMALL LIFE

REASONABLE

NOSTALGIC

HEALTH-CONSCIOUS

DISCOUNTER

WATER & SPRITZERS

Who are they?
What is their mindset?

7 household segments at one glance

MINDFUL GREENIE

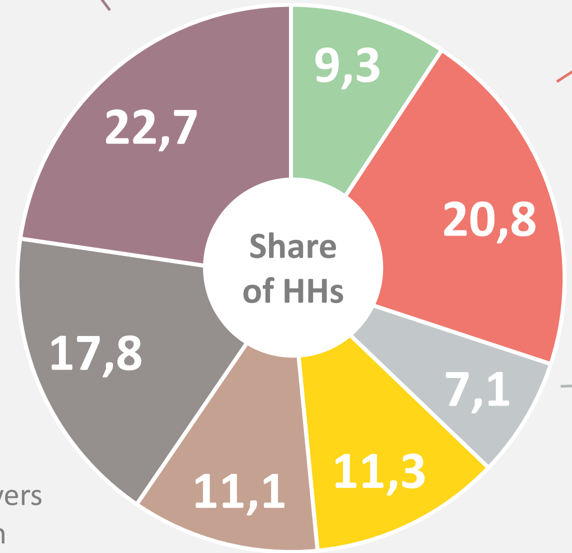
- Across all demographics, well-educated & financially ok, rather urban
- ECO orientation is key: organic / regional / fair-trade …
- Less interested in brands, but quality & organic is key: buying premium & PLBs
- Favor small / specialist stores, organic supers, drugstores but also discount
- Taking care of themselves: Sportive / healthy nutrition & drinks. Mainly juice/spritzer for NARTD

THRIFTY SENIOR

- Empty nesters & single seniors, average to low financial situation, more often located in East-Germany
- Living a reasonable, small life, very home-focused
- Health conscious: care about ingredients, daily cooking, no fancy NARTD; clearly favor sparkling water & Spritzers
- Budget minded, highest PLB & discount share

OPEN MINDED LIFESTYLER

- Younger, financially well off, clearly lifestyle oriented
- Lust for life, extroverted, demanding
- Innovation seekers, active lifestyle, going out (clubs/bars/…)
- Premium & brand oriented – buying in Supers / drugstores / online
- Broad NARTD portfolio, like specialties & lifestyle drinks (still water, bitters, colas, non-classical lemonades)



NON-CRITICAL BUDGETER

- Younger HHs & Families, scratching at their financial limit
- Inactive & very home focused, high TV & digital usage
- PRICE is key for them, not interested in brands, eco, …
- Very convenience oriented, uncritical fast-fooder, Discount buyers
- Love all kinds of NARTD with taste, but low water consumption

AFFLUENT EMPTY NESTER

- Empty nester, wealthy, having a good life, high social Status
- Brand Fixed, Quality- & Service Oriented, NOT innovative
- Open to Organic / Regional offers, but not key
- Buying sparkling water & classical CSDs
- Traditional RR PET crate buyers, often GAM & SM – by car

DOWN-TO-EARTH TRADITIONALIST

- Older, financially well-off, living in own house rather rural (south skewed)
- Strongly quality oriented, interested in sustainability topics
- Enjoying nature & outdoor activities (hiking, gardening, cycling)
- Very health conscious, daily cooking, preferring fresh/regional food
- Buying in supers, GAMs & local markets (organic, food markets)
- Heavy buyers of sparkling water (regional springs, glass bottles), but also juice drinks / Spritzers (healthy)

STRIVING MAINSTREAM FAMILES

- Younger households & families, large households who need to carefully budget
- Busy life, need to manage professional & family life, permanent time pressure / stress
- Pragmatic approach to life: Need to manage their daily life, no time for the greater good
- Love convenience, making their life easier: Convenience products, shopping in Discount & Hypers – NR PET & Cans. Innovation & brand affine – but need to fit their budget
- Buying all mainstream NARTDs, prefer flavored drinks



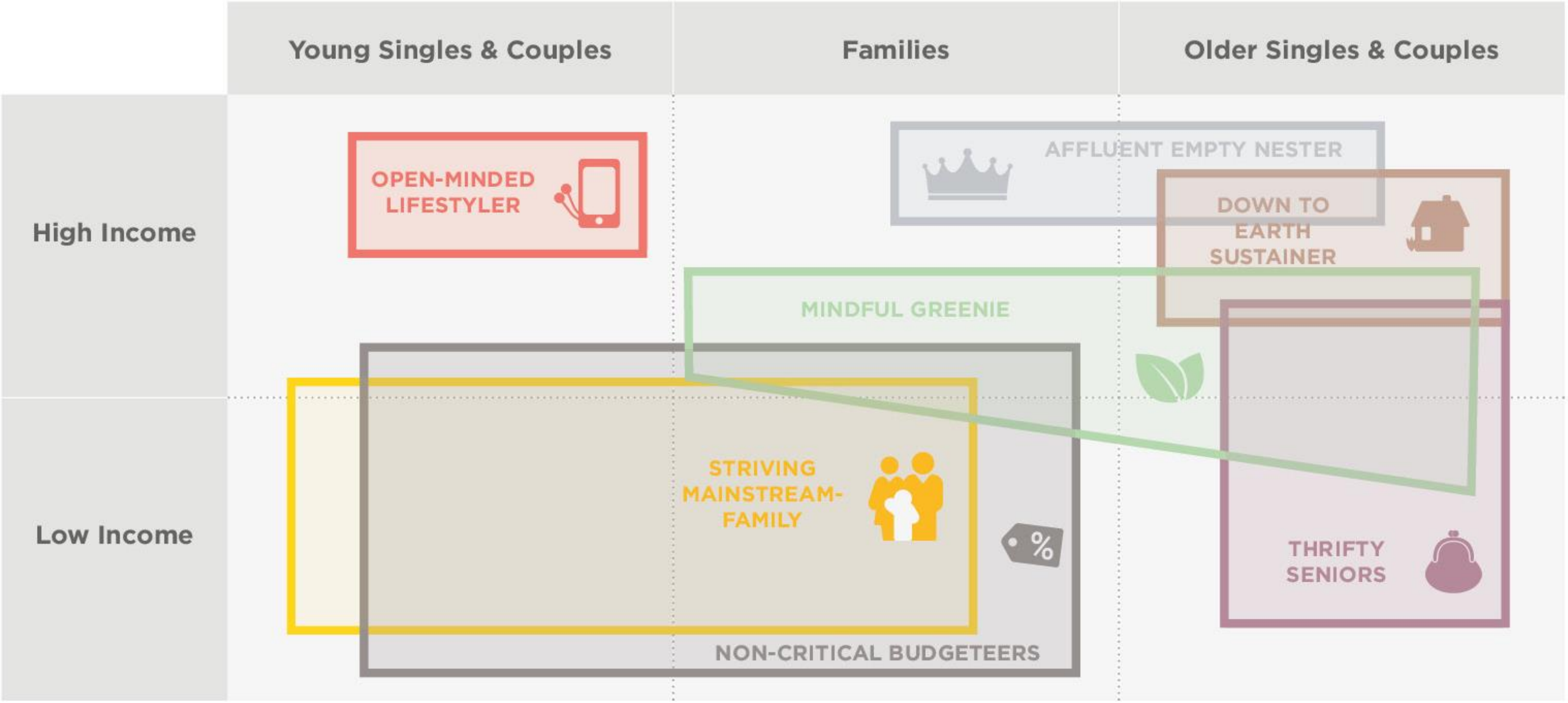



Different to only use demogs?

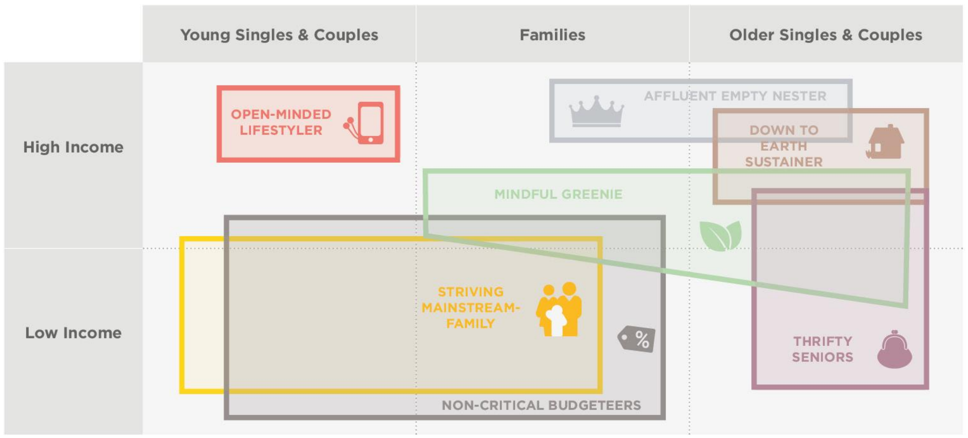





Attitudes & purchase behavior enriched segmentation helped a lot to sharpen our understanding of different HH segments

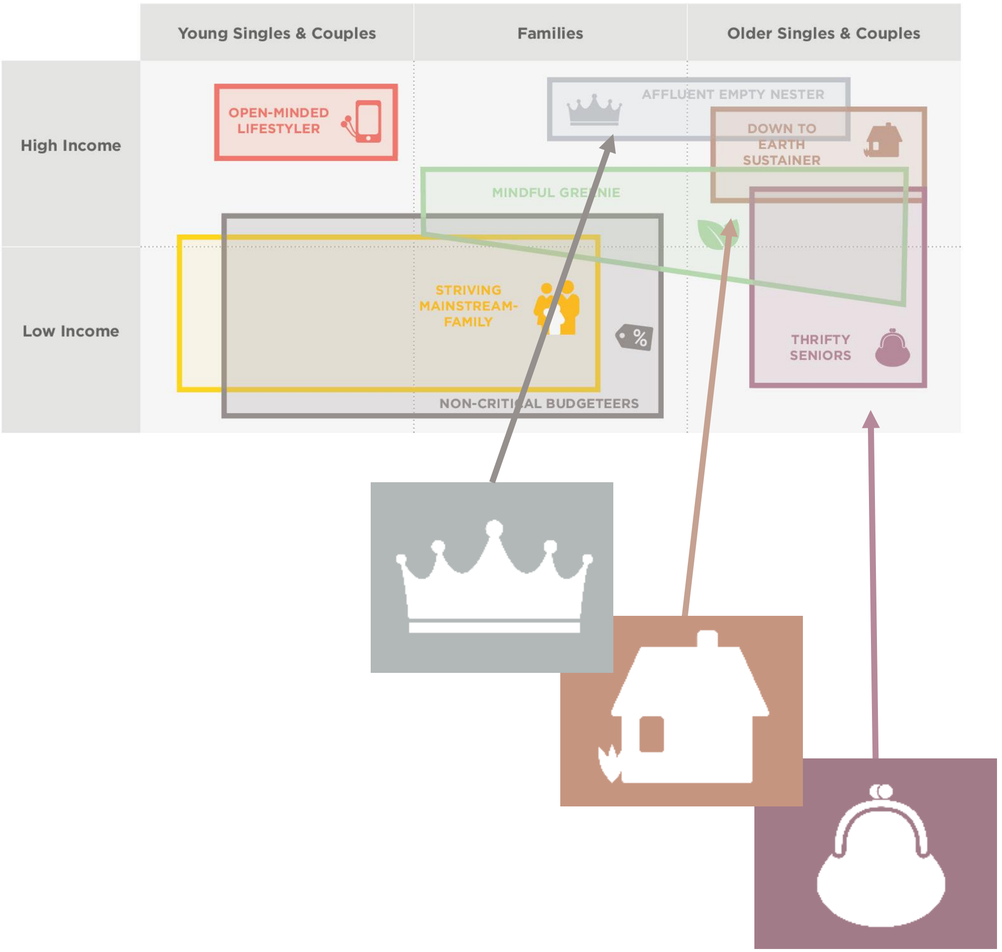


Similar demographics, but clearly different



Innovation Seekers **Brand Lovers** **Love eating out (convenience)** **Advertising interested**	**Price & Convenience interested only** **No fuzz about sustainability, health, …** **Rather inactive & advertising ignorant**
Frequent NARTD Buyers with high spend	**Convenient & price sensitive PLB Discount Buyers** (stock-up, low freq)
High KO share (19% NARTD, 15% Tea, 27% Energy)	**Sign. lower KO Share** (16% NARTD, 6% Tea, 16% Energy)

The 3 older HH segments – with different mindset . . .

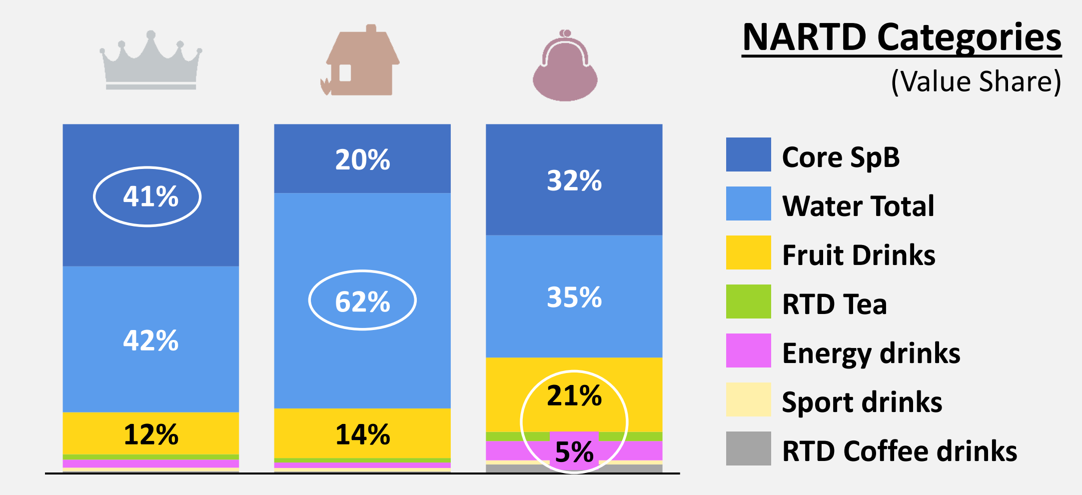


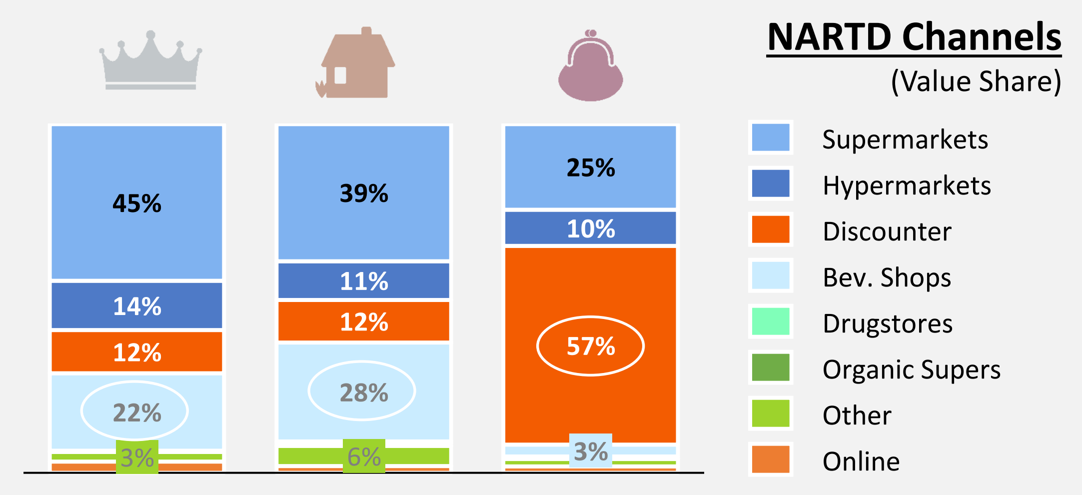
Brand-fixed
Quality minded
Service oriented

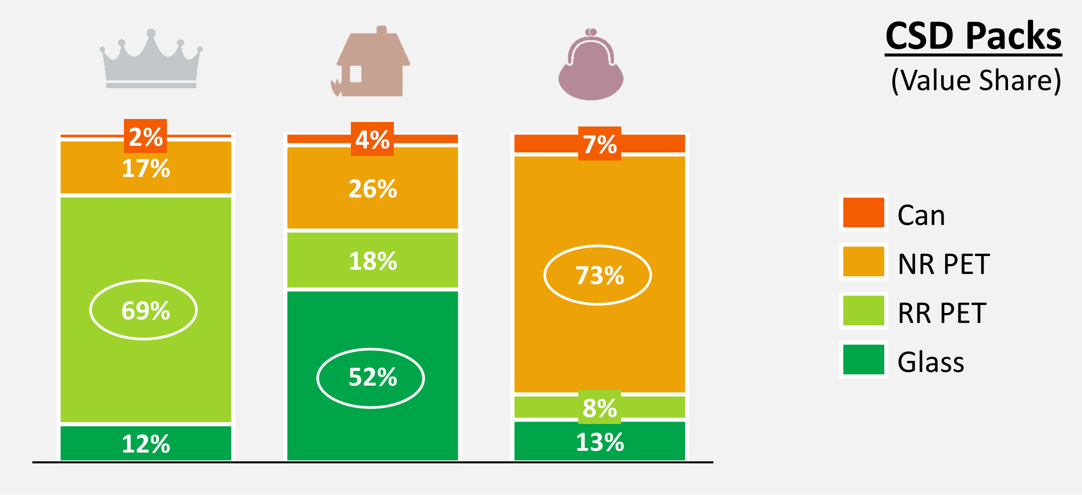
Quality first
Sustainability driven
Least open to change

Health focused
Most price-sensitive
Non-brand interested

. . . and completely different NARTD preferences & purchase behavior











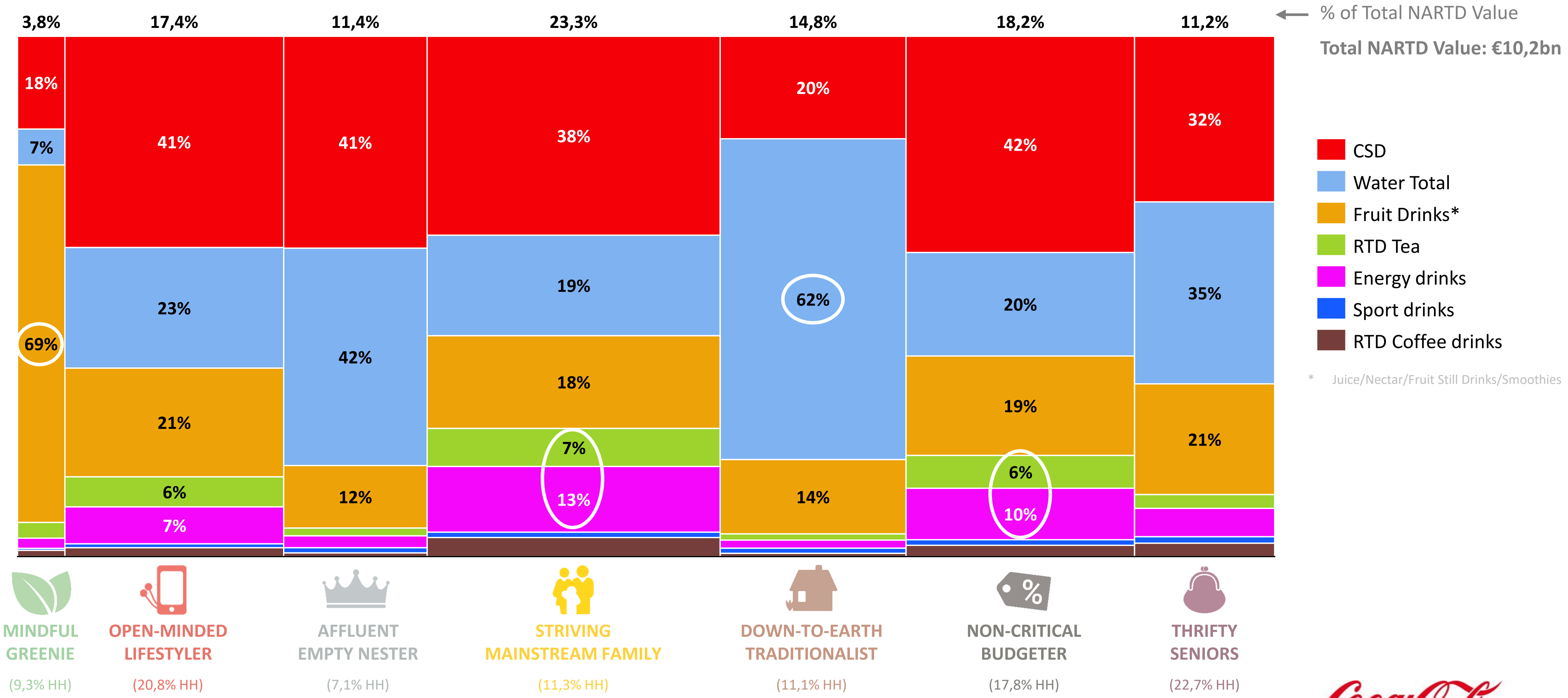

NARTD
Segment Preferences






Which NARTD categories do HH segments buy?

NARTD CATEGORY PREFERENCES BY HH SEGMENT (VALUE SHARE %) – NARTD w/o PLANT BASED

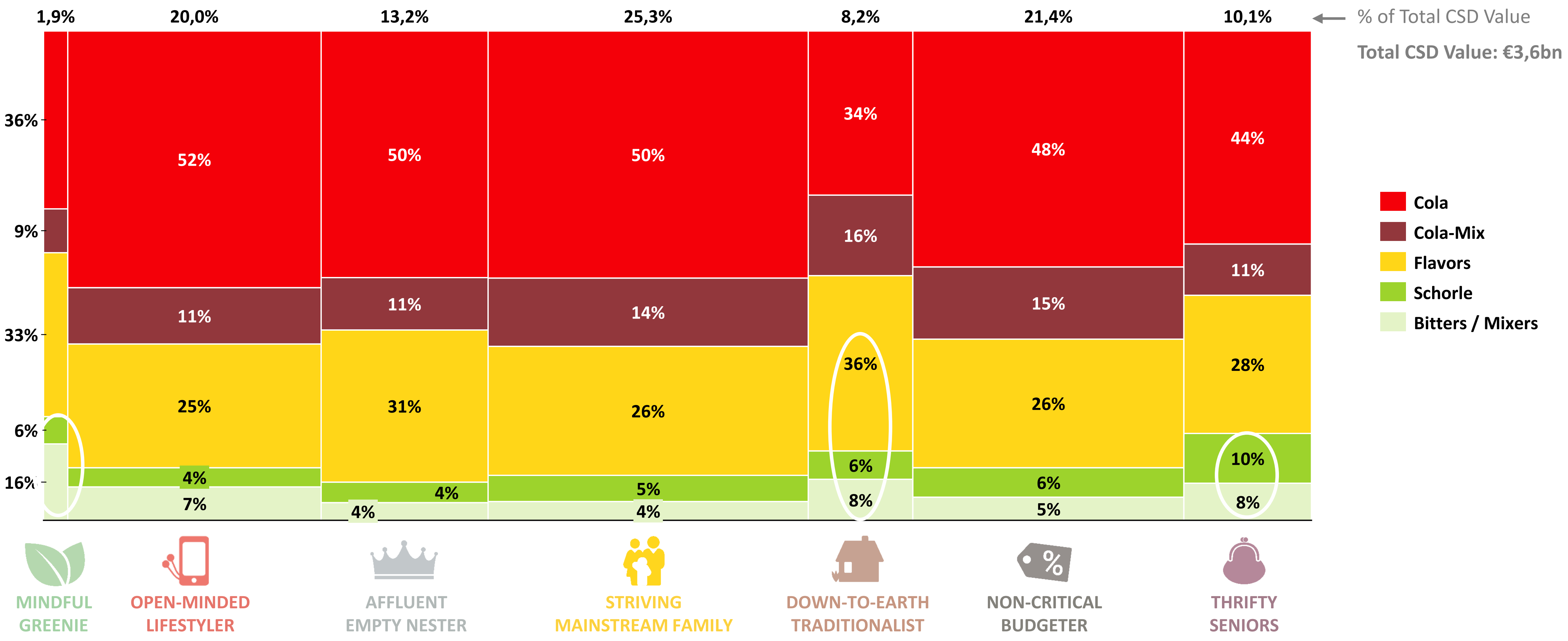


Source: GfK HH Segmentation – Headroom Calculation

Western Europe

CSD Breakup – smaller segments important for several HH Clusters

CSD VALUE BY HH CLUSTER & NARTD SUB-CATEGORY

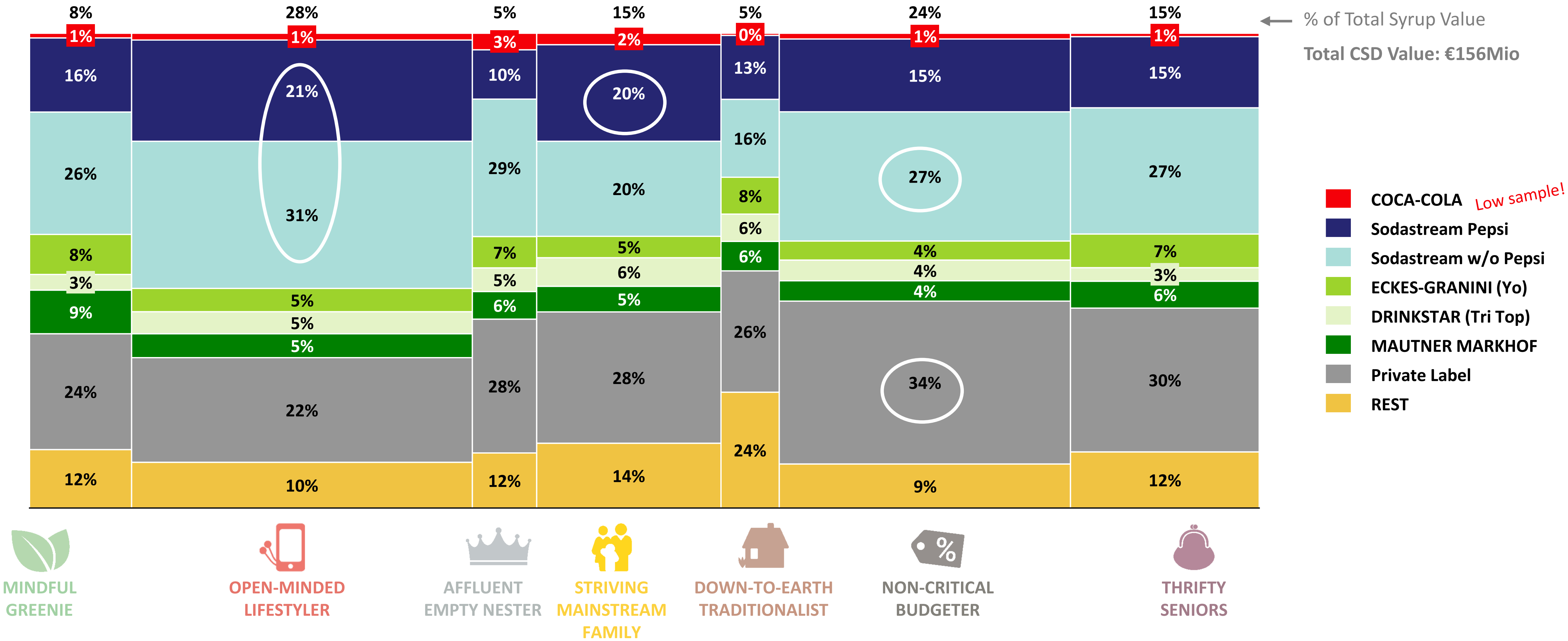


Source: GfK HH Segmentation – Headroom Calculation weighted to RP

Coca-Cola Western Europe

Syrup – a very challenging segment with Sodastream and PLB dominance

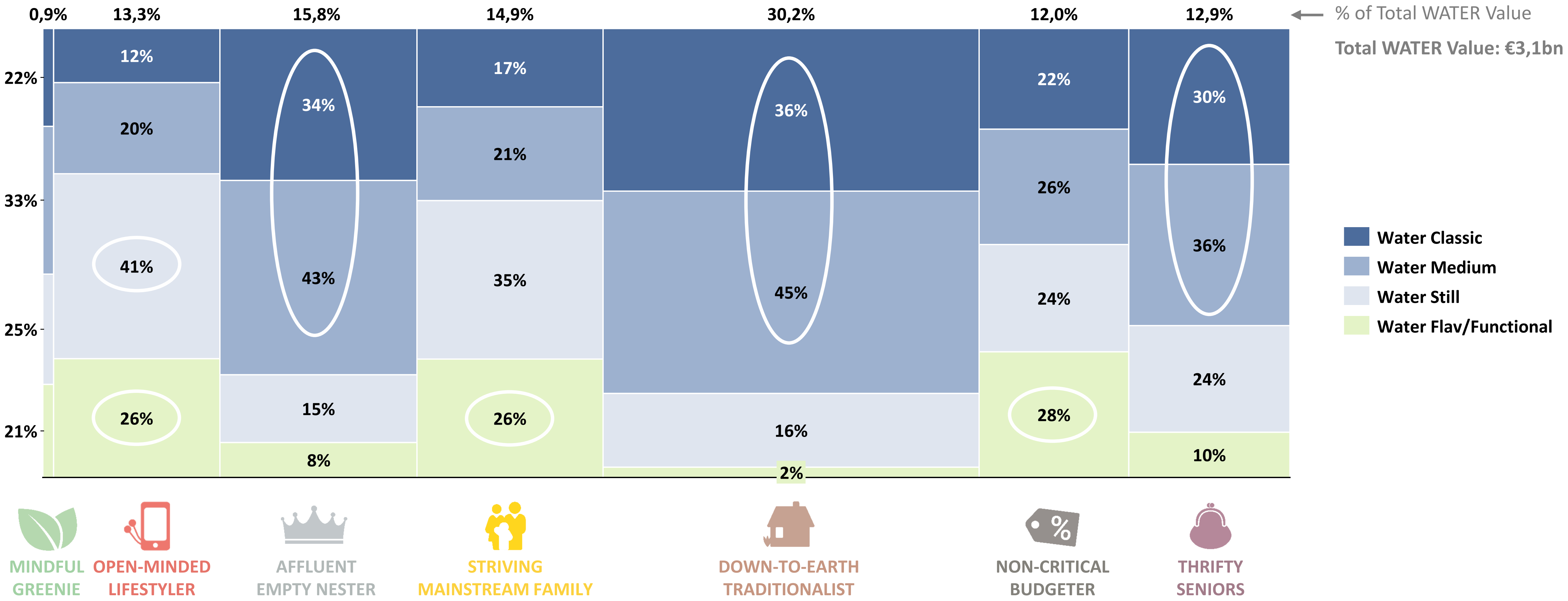
Syrup VALUE BY HH CLUSTER & MANUFACTURER



Source: GfK HH Segmentation – Headroom Calculation weighted to RP

Water – Functional Water is relevant in younger clusters

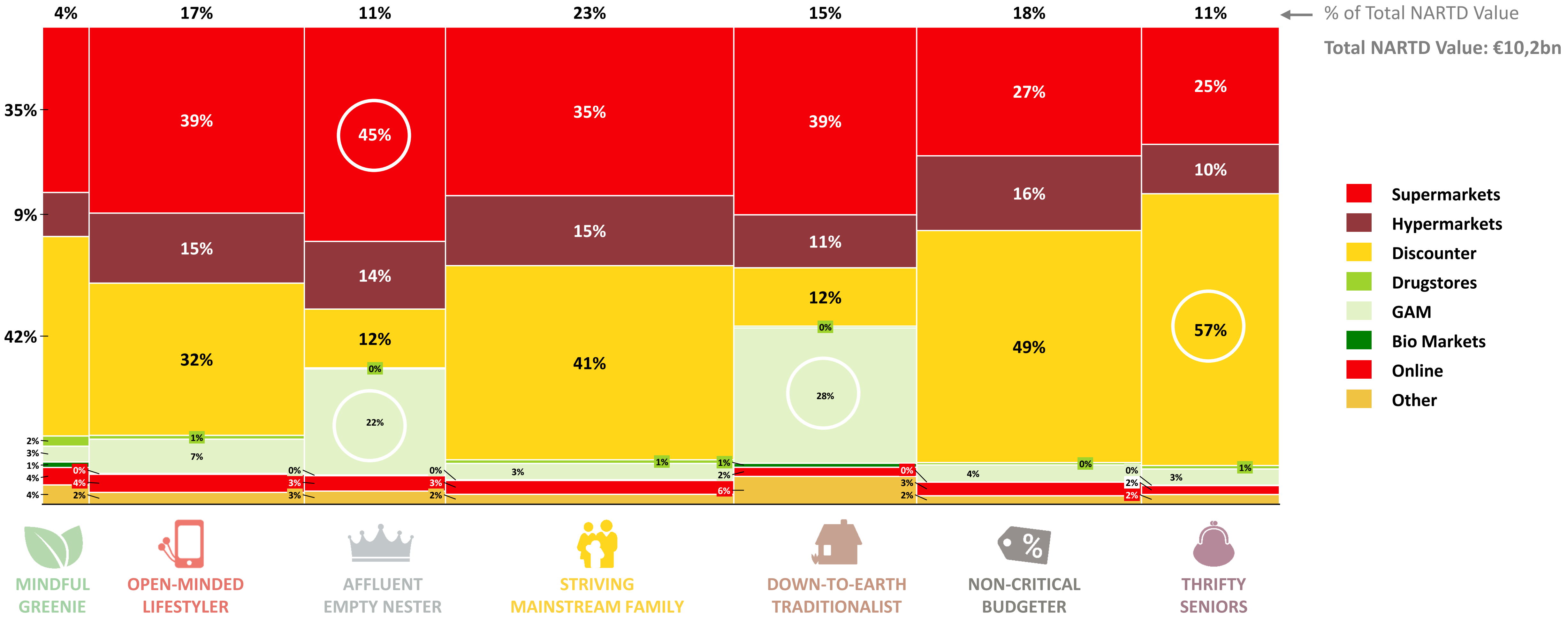
WATER VALUE BY HH CLUSTER & NARTD SUB-CATEGORY



Source: GfK HH Segmentation – Headroom Calculation weighted to RP

Channels – clear GAM difference and higher discount shares in Budgeters & Thrifty

NARTD VALUE BY HH CLUSTER & CHANNEL



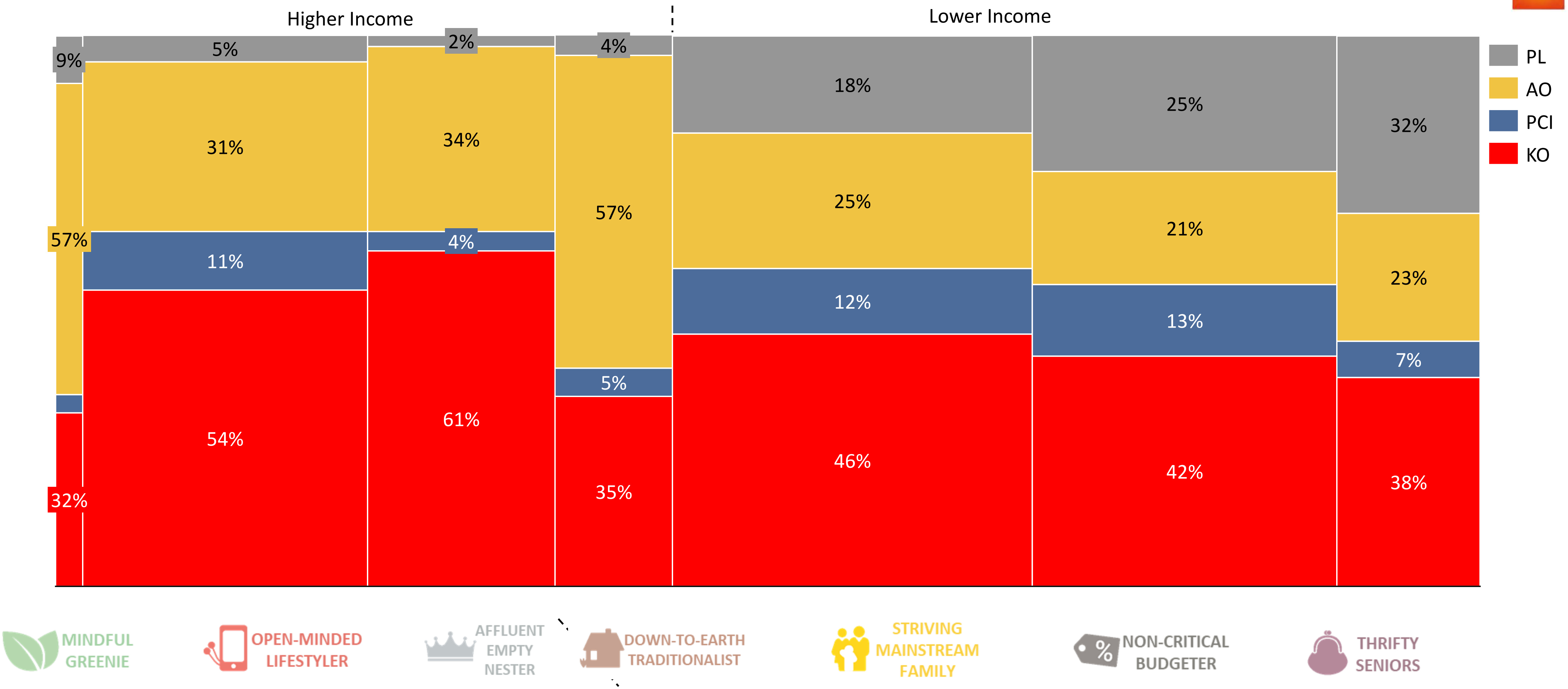
Source: GfK HH Segmentation – Headroom Calculation weighted to RP

Western Europe

Revenue Maps

KO is strongest in Affluent empty Nesters and Open-Minded Lifestylers

SSD REVENUE MAP PER HH-SEGMENT – REVENUE SHARE %



KO HH-Segmentation based on MAT 9 2021
Source: GfK HH-Panel PL = Private Label AO = All Others

Coke TM well positioned – ViO Bio with strong starting point vs. premium competitors

SHOPPER PROFILE KEY SSD BRANDS PER SEGMENT – MAT OCTOBER 2021

SSD Revenue Index vs. Total Shoppers

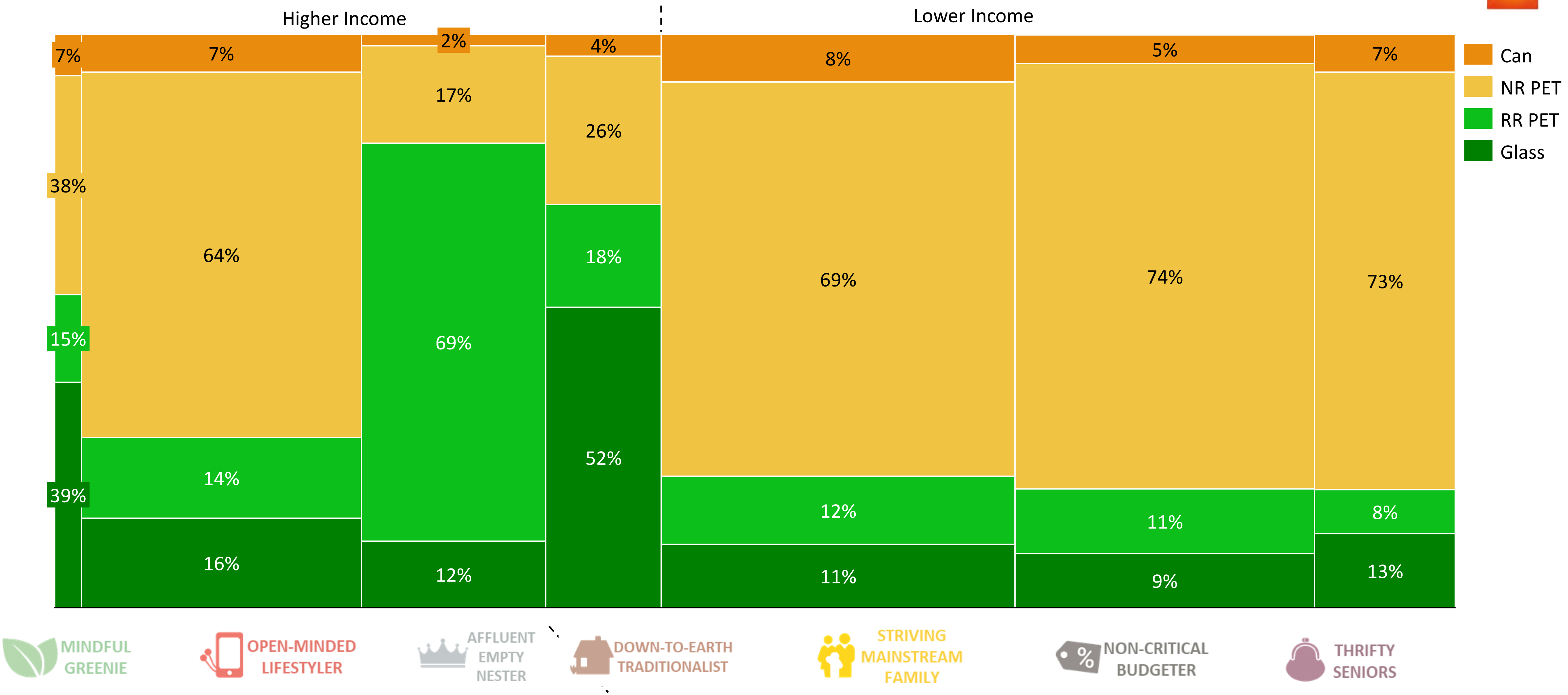
		MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAMILY	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS
Colas	Coke TM	83	109	121	93	108	89	90
	Pepsi TM	43	98	42	117	84	136	78
	Fritz Kola	788	115	59	103	124	34	150
Colamix	MezzoMix	73	111	213	92	52	77	86
	SchwipSchwap	50	135	32	119	40	120	78
	Paulaner Spezi	215	96	86	105	156	72	105
Flavours	ViO Bio	137	191	42	118	53	85	48
	Fanta	59	108	113	109	58	105	89
	Sprite	107	115	135	97	54	92	90
	Granini Die Limo	95	199	40	96	64	86	88
	Bionade	336	127	90	86	164	37	104
	San Pellegrino	136	171	53	85	59	75	159
	Fritz Limo	365	125	38	58	261	34	149

Small, local, premium players successfully combine quality, (local) heritage and hipness

KO HH-Segmentation based on MAT 9 2021
Source: GfK HH-Panel

Significant differences in the pack preference: NR PET dominates in the lower income segments, Refillable Pet in "Affluent Empty Nesters"

SSD PACK PREFERENCE PER HH-SEGMENT – REVENUE SHARE %



KO HH-Segmentation based on MAT 9 2021
Source: GfK HH-Panel PL = Private Label AO = All Others

Opportunity Maps

In Preparation – Excel Version

Highest NARTD value sits with CSD , water & Juice

% OF TOTAL NARTD VALUE & KO VALUE SHARE (%) WITHIN CATEGORY & HH SEGMENT

Color Coding:
≥ 1,0% of NARTD Value
≥ 5,0% of NARTD Value
KO Share under-prop
KO Share over-prop
in respective HH Segment

	MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAM	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS	Total HHs
CSD	0,5	5,5	5,0	10,3	2,2	7,3	4,4	35,2
KO Share	30,6%	54,3%	58,0%	41,1%	35,5%	35,9%	29,9%	42,6%
Water	0,2	3,8	5,3	6,3	7,7	4,2	5,7	33,2
KO Share	1,0%	3,2%	5,0%	1,9%	1,2%	0,4%	0,4%	1,9%
Juice Drinks *	2,5	3,1	1,7	5,0	2,1	3,5	3,2	21,2
KO Share	1,7%	4,8%	3,5%	2,4%	1,2%	1,6%	1,5%	2,4%
RTD Tea	0,1	0,6	0,2	1,6	0,1	1,0	0,3	3,8
KO Share	3,5%	7,1%	15,4%	7,6%	6,0%	4,1%	4,2%	6,6%
Energy	0,0	0,5	0,2	1,7	0,1	0,9	0,4	3,9
KO Share	9,0%	19,7%	27,0%	22,0%	16,3%	15,0%	11,3%	18,9%
Sports	0,0	0,1	0,1	0,3	0,1	0,2	0,2	0,9
KO Share	2,4%	2,5%	3,4%	4,4%	8,6%	3,0%	1,2%	3,7%
RTD Coffee	0,0	0,2	0,1	0,7	0,1	0,3	0,2	1,6
KO Share	0,9%	1,0%	0,4%	0,8%	0,7%	1,0%	0,3%	0,8%
Other **	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,1
KO Share	1,5%	1,7%	16,5%	3,3%	28,7%	1,5%	2,5%	4,7%
NARTD Total	3,5	13,7	12,7	25,5	12,8	17,2	14,5	100,0
KO Share	5,7%	24,3%	25,7%	19,0%	7,2%	16,4%	9,7%	16,8%

NARTD excl. Plant Based
* Juice Drinks = Juice/Nectar/Fruit Still Drinks/Smoothies
** Other = Wellness Drinks

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- Confidential -
Classified - Confidential

Western Europe

Shows the importance of cells and where KO is strong or has an potential!

2019 data

Western Europe

HH Panel + Project 2019

First delivery of GfK Household Segmentation

S&I Commercial Insights WE

Most frequent Drinking Moment Routine Refreshment is especially relevant for Affluent Empty Nesters but less for Mindful Greenies

New Household segments – value share of Drinking Moments by segment

Please note: Data based on 2019, refresh is possible

NARTD

Distribution of Value by Consumption Occasion of Segments - In % Value

Segment	Breakfast	Everyday Meals @home	Special meals @home	Routine Refreshment @home	Special screentime @home	Rewarding relaxing @home	OOH work study sport	OOH: On the go	Other	*Unweighted NARTD Trips*
Mindful Greenies	10	17	10	29	7	15	5	2	6	151
Open-minded Lifestyler	5	14	8	34	9	13	9	6	4	422
Affluent Empty Nesters	3	13	6	38	12	13	11	3	2	253
Striving Mainstream Family	3	11	7	31	15	15	8	5	5	636
Down to Earth Traditionalist	3	13	9	34	12	13	4	6	7	335
Non-critical Budgeter	3	13	6	37	11	11	9	4	5	577
Thrifty Seniors	4	12	8	33	12	15	6	6	5	728
Total	3	13	7	34	12	13	8	5	5	3,101

Source: Europanel - Household Panel+ +++

Coca-Cola Western Europe






Changes of the HH segment since 2019 (COVID impact & longterm Trends)






In general, we see a uptrading in the German HH segments

Development on HH Segments shares in % 2021 vs 2019

	HH Segments MAT Okt 2019	Change due to Market* in ppts	Reason why (Interpretation)	Change due to Method (Weighting, better coverage)	HH Segments MAT Sept 2021
MINDFUL GREENIE	8,1	+0,8	Growing Eco Involvement	+0,3	9,3
OPEN-MINDED LIFESTYLER	16,3	+3,8	Trend for Premium & Lifestyle	+0,6	20,8
AFFLUENT EMPTY NESTER	7,9	-0,8	Less "structured Crate" buying	-0,1	7,1
STRIVING MAINSTREAM FAMILY	13,9	-2,3	Less "carefree consumption"	-0,3	11,3
DOWN-TO-EARTH TRADITIONALIST	12,2	-0,3	(very small change)	-0,9	11,1
NON-CRITICAL BUDGETER	16,5	+1,1	Some Covid Economy Impact	+0,2	17,8
THRIFTY SENIORS	25,2	-2,5	Uptrading of Seniors, retired are safe in Covid times	+0,0	22,7

Source: GfK HH Segmentation – 2021 vs 2019

Western Europe

Some examples of market trends, driving the segment sizes

Some strong Trends – Differences in Cluster generating variables 2021 vs 2019

Based on segmentation dataset – slighty different to Reporting numbers

"Premium Brands" +1,5 ppts

Glass Packtype +1,6 ppts

Can Packtype +1,2 ppts

Juice Segment +1,4 ppts

Volume per Trip +14%

Private Label -4,8 ppts

PET NR -3,5 ppts

Sparkling Water -5,0 ppts

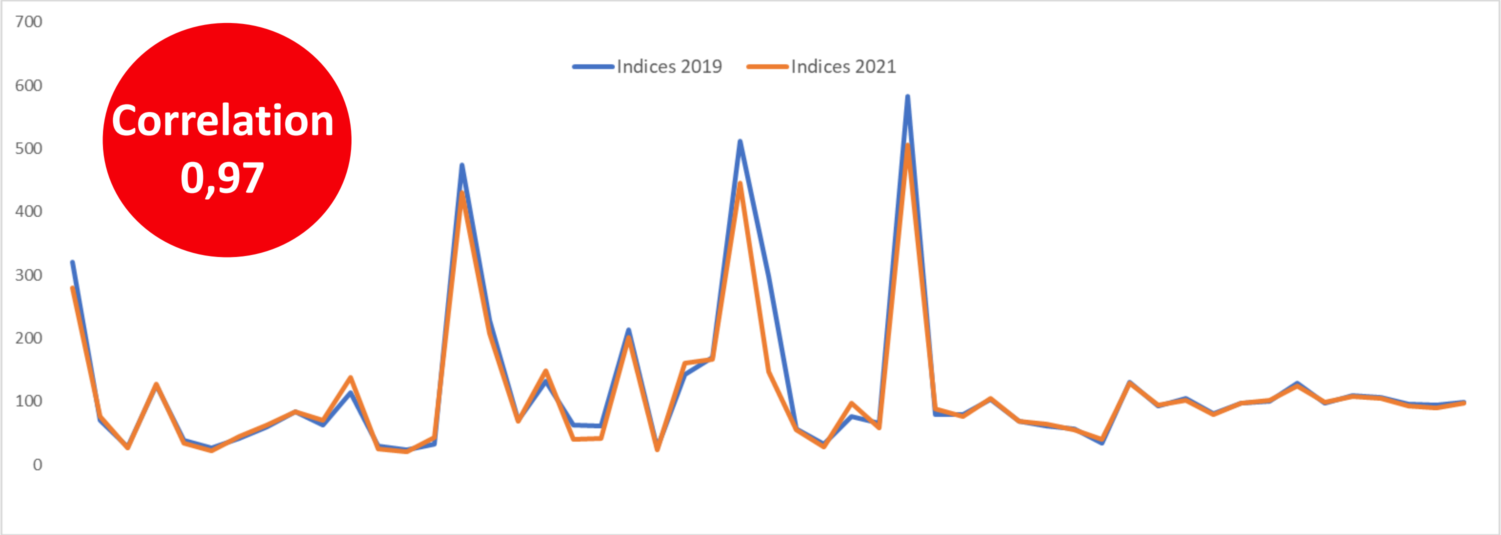
Source: GfK HH Segmentation – 2021 vs 2019

Overall, characteristics of HH Clusters are very stable

Index Pattern of Cluster defining Variables 2021 vs 2019

Example

MINDFUL GREENIE



	MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAM	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS
All Correlations:	0,97	0,93	0,98	0,98	0,96	0,98	0,97

We see that in most cases, “neighbour” segments have a higher switching affinity

Switching Matrix (HH that were segmented in both periods, ca 63% of 2021 HHs)

HH Segments in
MAT Sept 2019...

	MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAMILY	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS
MINDFUL GREENIE	**615**	84	32	25	54	22	84
OPEN-MINDED LIFESTYLER	90	**308**	69	79	44	51	61
AFFLUENT EMPTY NESTER	28	90	**705**	19	80	36	24
STRIVING MAINSTREAM FAMILY	12	48	20	**528**	8	54	40
DOWN-TO-EARTH TRADITIONALIST	37	58	106	27	**474**	20	34
NON-CRITICAL BUDGETER	23	31	27	82	19	**419**	45
THRIFTY SENIORS	65	54	17	65	26	44	**255**

Index vs Total

Source: GfK HH Segmentation – 2021 vs 2019

Crossing with other Segmentations – sustainability and Shopper Segments

	Eco Actives	Eco Considerers	Eco Dismissers	Premium Shopper	Brand Shopper	Promo Shopper	PLB Shopper
MINDFUL GREENIE	68,3	26,1	5,7	26,6	17,7	8,1	47,6
OPEN-MINDED LIFESTYLER	51,3	38,1	10,6	25,7	21,8	27,1	25,4
AFFLUENT EMPTY NESTER	48,0	36,7	15,4	31,9	20,8	26,8	20,5
STRIVING MAINSTREAM FAMILY	29,7	45,0	25,2	10,2	25,1	19,6	45,1
DOWN-TO-EARTH TRADITIONALIST	58,5	34,8	6,7	33,6	23,9	17,5	25,0
NON-CRITICAL BUDGETER	23,1	44,4	32,4	7,8	20,2	18,9	53,1
THRIFTY SENIORS	49,5	36,7	13,8	13,1	19,0	11,8	56,0

Western Europe






How to Access Data and Analysis

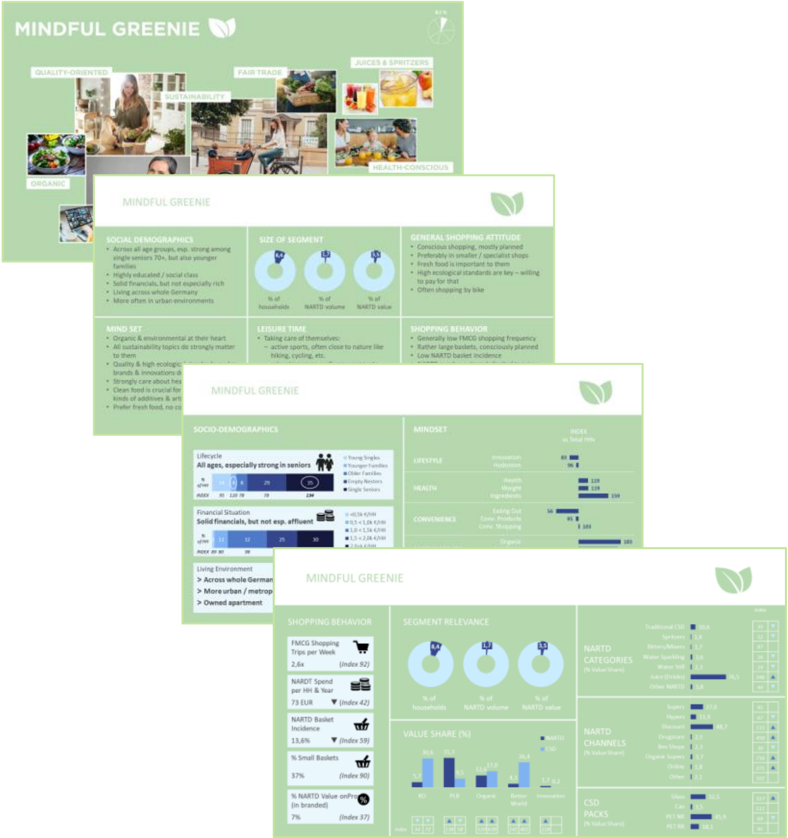




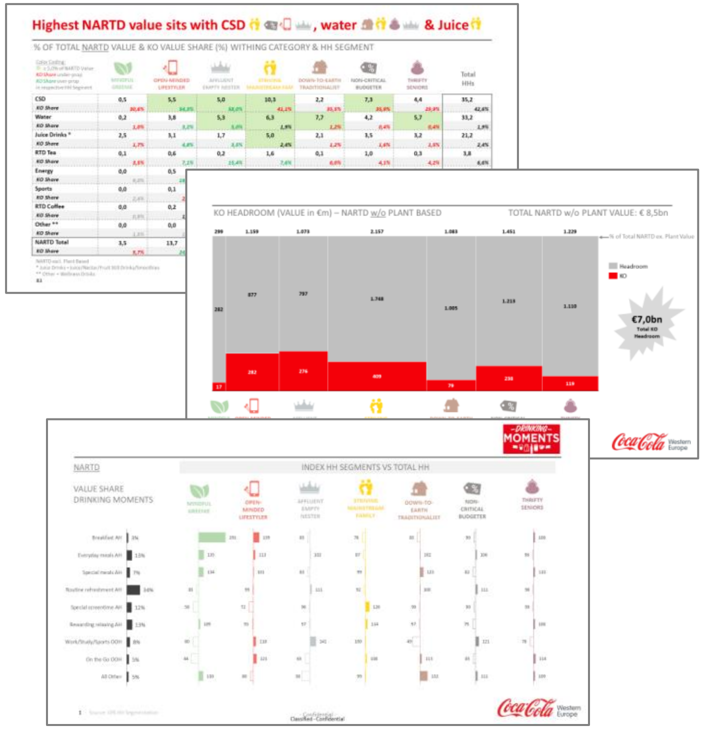

Detailed profile available for each HH segment

Socio-Demographics → Shopping Behavior → Mindset & Attitudes → Drinking Moments → Living Situation → Leisure Time → Media Habits

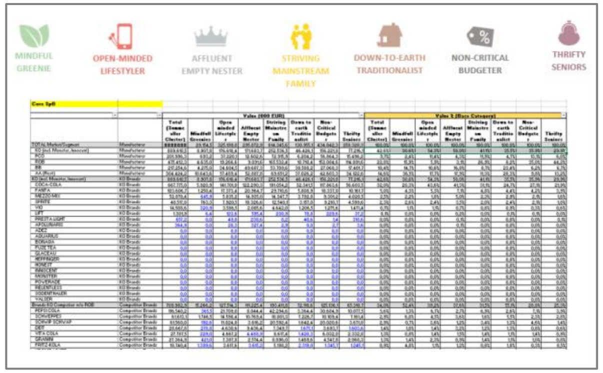
Fact Sheets



Opportunity Maps, Headroom by Category, Drinking Moments



All Details in XLS



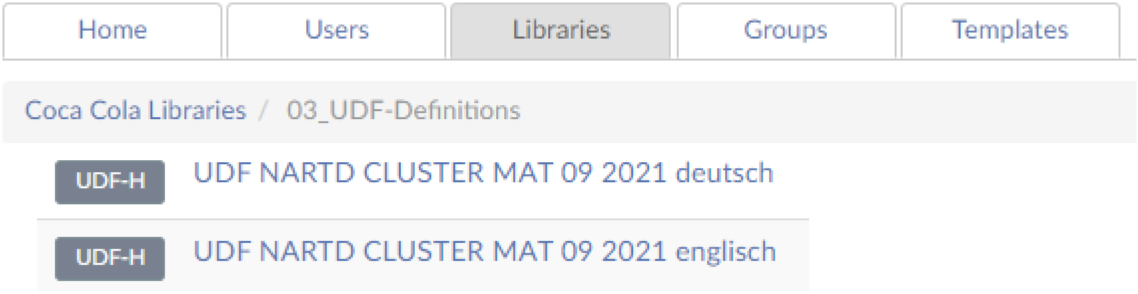
Package will be updated -

For further Analytical Needs, the segments are available in Analyze-IT*

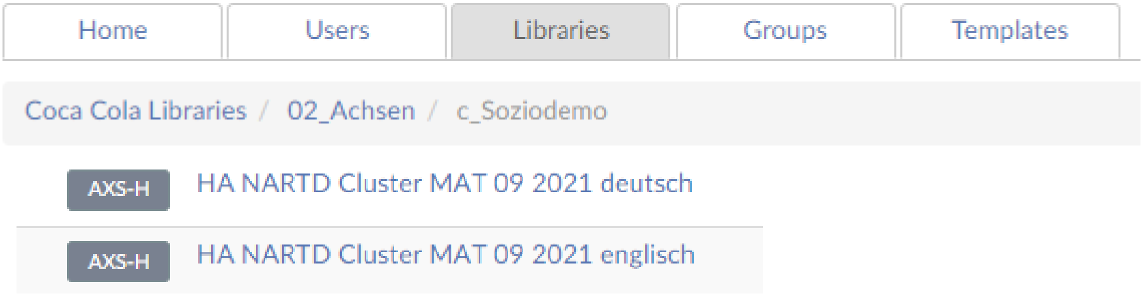
* Consumer Panel platform

Segments are available in AIT here:

UDF Household



Household-Axis



Insights Team and GfK will support with details!

Segmentation is based on MAT Sept 2021, so full coverage of alle households is guaranteed in this period.

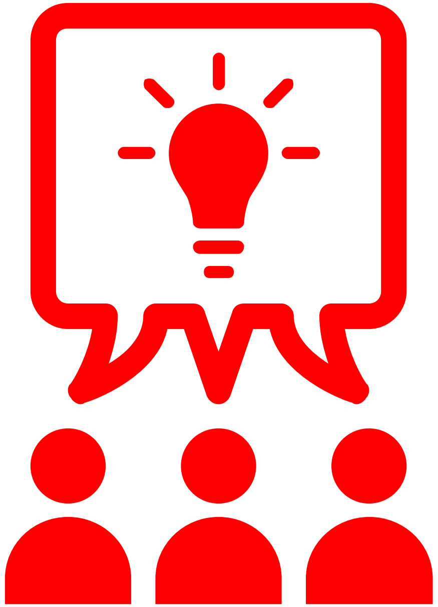
If the segments are analyzed ongoing in 2022 and beyond, less Households are classified (Panel Churn), so do not use absolute volume/value, instead relative measures.

As weighting is slightly different with new CP + 2.0, numbers cannot be compared exactly to the 2019 segmentation results, but content wise.

Solution for the Quiz – what Segment has the highest index for that KO product?

MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAMILY	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS
24	124	36	189	36	105	43

MINDFUL GREENIE	OPEN-MINDED LIFESTYLER	AFFLUENT EMPTY NESTER	STRIVING MAINSTREAM FAMILY	DOWN-TO-EARTH TRADITIONALIST	NON-CRITICAL BUDGETER	THRIFTY SENIORS
161	169	54	122	57	75	69



What Questions do you have?






THANK YOU !
Ready to activate?



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