

ROMANIA

# Cola Dual Buyers in Traditional Trade

A report by Consumer Panel GfK for  
The Coca Cola Company

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# 0 Study background and methodology

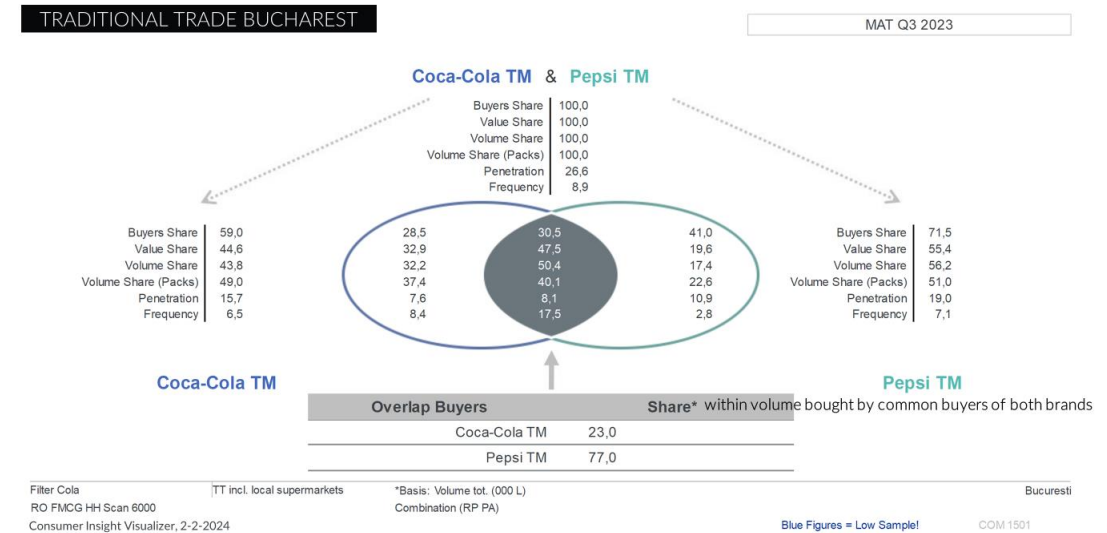
# Background and Business Need

## Background:

- The Buyer Overlap analysis on TT Bucharest revealed Switchers have significantly higher volumes of Pepsi than of Coca-Cola in their baskets.
- This group of buyers is of peculiar relevance as they are the more valuable shoppers.
- Considering TTs importance in Cola volumes, it is important to understand the drivers behind Pepsi's performance and if it stands to extend in other large urban.

**As for TT Bucharest, number of switchers drop to 30.5%, while Pepsi TM share of their volumes surge up to 77%**

They have more exclusive buyers [41% vs. 28.5% for Coca-Cola TM], but volume wise, those of Coca-Cola cover almost double in terms of need [32.2% vs. 17.4%]





# Methodology

## Target

Men and women aged 18 y.o.+, shoppers of Coca-Cola and/or Pepsi products in Traditional Trade from Bucharest and Large Urban

## Data collection method

Face-to-face Tablet Assisted Web Exit Interviews

Respondents will be approached after exiting a Traditional Trade store with a Pepsi and/or Coca-Cola purchase.

## Sample

N = 720 respondents: Bucharest N=360 & Large Urban N=360

Equally split between Coca-Cola / Pepsi Exclusives and Switchers in P3M

## Questionnaire

Max 20 min length

## Data collection period

August 9 – 21, 2024

# 1 Key Findings

# Key take-aways

## Drivers of purchase

## Path to purchase

### Reasons for purchase:

Loyalty (product I always buy) and fit with the occasion are main direct drivers of purchase, significantly higher in Bucharest. In Large urban, friends' preferences, placement in store and price are more important than in Bucharest, but still not overpassing the first two reasons.

- Higher product loyalty and lower price influence for Coca-Cola in Bucharest vs Large urban, same for Pepsi.
- Higher influence of friends' preferences for both brands in Large urban vs. Bucharest.
- Higher product placement importance for Pepsi in Large Urban vs Bucharest.

### Shopping mission

Immediate consumption is main shopping mission, even higher in Bucharest.

Shopping for fresh basic foods more frequent among overlap buyers.

- For Total, there are no significant differences in main shopping missions by brand purchased. Shopping for promo is slightly higher for Pepsi, but at only 2%.
- The shopping missions do not differ for the two brands TM in Bucharest either. Coca-Cola Original Taste is slightly higher in bulky shopping missions at 3%.
- Shopping missions are uniform across Large urban by brand as well, except larger promo shopping for Pepsi TM at 2%.

### Purchase planning

Most purchases are planned in detail, especially among Coca-Cola exclusives and Bucharest shoppers. The opportunities for in-store brand-choice are lower in Bucharest.

- By brand, Coca-Cola TM has a planned purchase significantly higher than Total at 62%, while Pepsi is over-represented among those that only planned for a cola, but has lower planned purchase.
- In Bucharest, Pepsi is less planned and Coca-Cola is under-represented in cola drink plan. Same for Pepsi in Large urban.

# Key take-aways

## Placement Price

### Store placement:

Refrigerators are by far most frequent placements, followed by the direct service by the cashiers. Refrigerators at store entrance are more important in Bucharest. Bucharest and Coke exclusive shoppers buy their colas cold more than the rest.

- Special placements in store are not frequent. In large urban, their presence is significantly higher than in Bucharest, but still only at 2%.
- Placements are uniform across Brands purchased in both in Bucharest and in Large urban.
- Products are purchased cold irrespective of brand both in Bucharest and in Large urban.

### Price awareness

Most consumers (>60%) are not checking prices at all. In Bucharest, there is a slightly higher price check with no comparison in store, while it is lower in Large urban.

- Higher price check with no comparison in Bucharest is happening across all purchased brands.
- Pepsi brand buyers are more price aware in Large urban.



# Key take-aways

## Consumption occasions

### Consumption occasions:

In Bucharest, shoppers are more in out of home occasions, while in Large urban they are more inclined to in-home. Daily meals are a more important occasion for overlap buyers.

- Occasion groups are similar across brands purchased, both in Bucharest and Large Urban.

Among top consumption occasions, the overlap buyers stand out with higher socializing at home. In Bucharest, on the go is most important. In Large urban, higher importance of socializing at home.

- Watching TV more important occasion for Coke than for Pepsi in Large urban.
- Special time for myself is less important for Coke buyers in Bucharest than for total Bucharest buyers.

Across all consumption occasions, main difference between Large urban and Bucharest comes from on the go vs. socializing at home, work & study at home.

- Differences in occasions mostly come with different consumption habits between community types, and much less by brand purchased.



# Key take-aways

## Drivers of preference

### Drivers of brand preference// Overlap Buyers

Bucharest Overlap Buyers are driven in their brand preference by **quality they can trust, for moments of relaxation and refreshing taste**.

Large Urban Overlap Buyers are driven by **distribution** first, followed by **value for money, quality they can trust and sharing values**.

- ⇒ In Bucharest, overlap buyers are more **emotional** and value **brand relationship**.
- ⇒ In Large Urban, overlap buyers are more **pragmatic**, succumb to distribution and look for value for money.

### Drivers of brand preference// Exclusives

Both Coca-Cola and Pepsi exclusives are driven most by **emotional** attributes in Bucharest: **moments of relaxation**. Coke has an additional driver: **trusted quality**.

This goes against the Large Urban exclusive buyers, who are, again, more pragmatic: buying Coke for **physical availability** and Pepsi for **frequent promo**.

Still, Coke buyers bring an emotional twist: second most important driver is **trusted quality**. For Pepsi, it is also pragmatic: **value for money**.



## Recommendations: how to win overlap buyers in Bucharest

- Build emotional connection with the Bucharest overlap shopper, especially along **trusted quality** and **refreshing taste**. Transform your strength in **moments of relaxation** into a differentiator, as this is equally a strength for Pepsi.
- Price & promo, distribution or store placements are low importance drivers in Bucharest. However, build on the current strengths you have on **premium pricing**, **frequent promo**, **frequent special placements**.
- Opportunity to invest in current special placements that enforce an emotional connection.
- To counteract Pepsi, target older consumers, as they have higher connection with your competitor.
- Nurture the younger consumers as they have more emotional connections with your brand, more associations in all domains except touchpoints.

## Recommendations: how to win overlap buyers in Large Urban

- Always keep an eye on **physical availability** and **value for money**: these consumers are much more likely to buy what they have at hand and is affordable. Build differentiation along these territories, as they are not challenged by Pepsi.
- Next, build differentiation on the emotional connection with **shares my values** and **trusted quality**.
- Promo or store placements are low importance drivers in Large Urban. However, build on the current ownership you have on **frequent promo** and **promoted by** celebrities, and your strength in premium pricing.
- Watch-out for the strength Pepsi has in **making moments special**, **advertising awareness** and its ownership over the territory of **special placements**.

# 2 Detailed Results

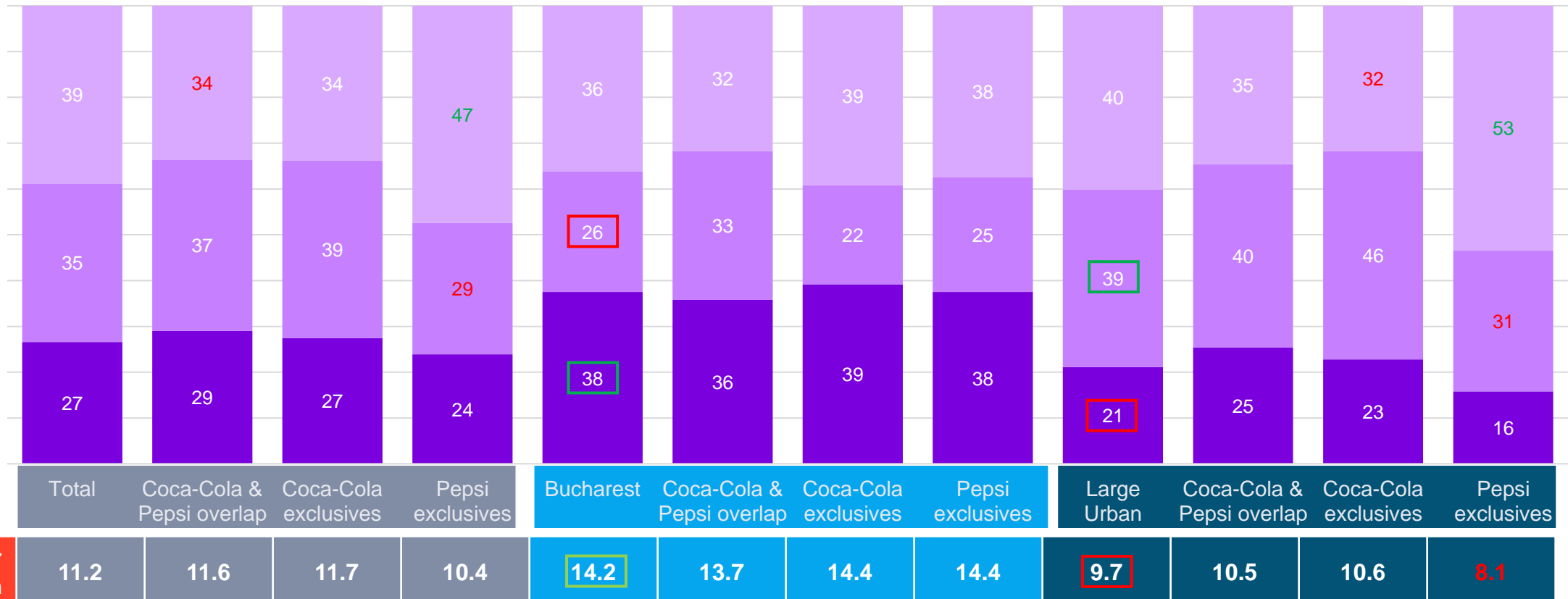
## **2.1. Shopping & Consumption habits**

Bucharest buyers report higher frequency for SSD in TT.  
In Large urban, Pepsi exclusives are significantly less frequent.

### SSD purchase frequency in TT, %

■ Heavy (4-7 times/week) ■ Mid (2-3 times/week) ■ Light (once a week or less often)

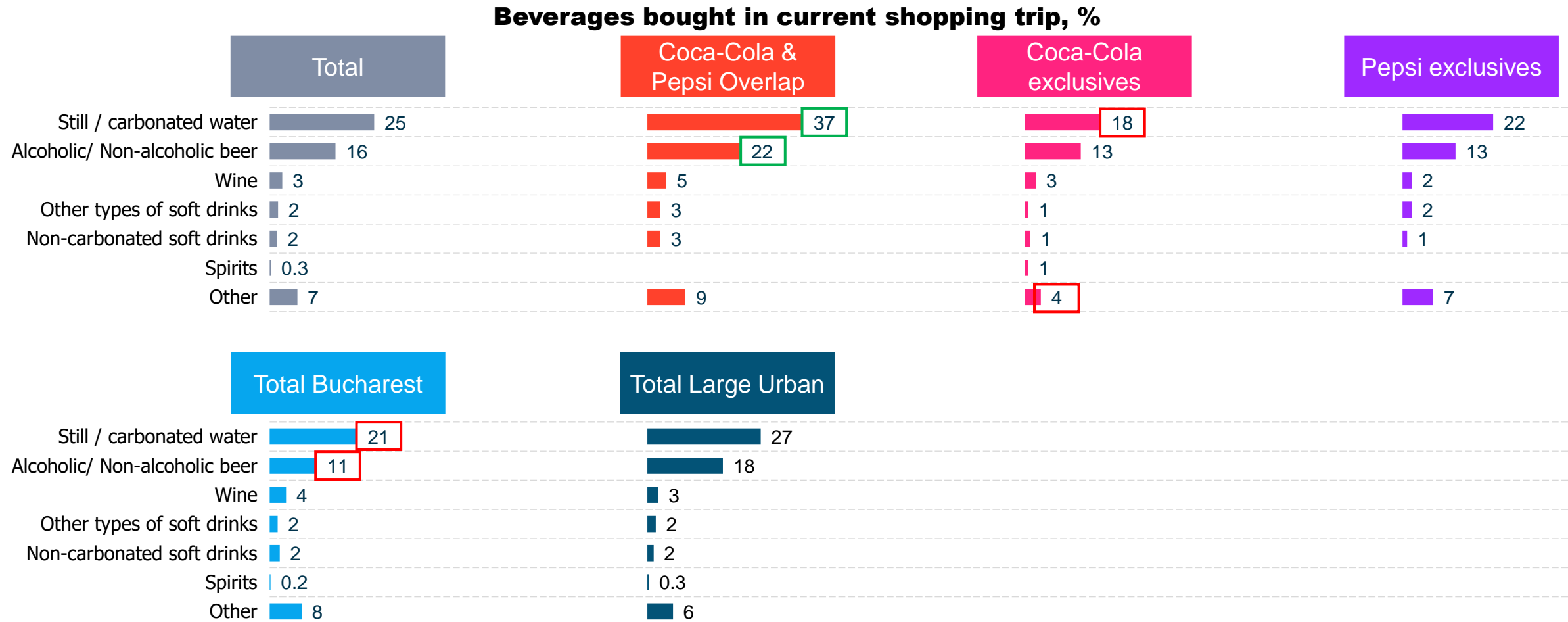
Significantly higher / lower than Total  
XX / XX Significantly higher / lower than Total



Base: all respondents; **Total**: Total (n=736), Coca-Cola & Pepsi overlap (n=253), Coca-Cola exclusives (n=243), Pepsi exclusives (n=240)/ **Bucharest**: Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/ **Large Urban**: Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)  
S03. How often do you usually buy **carbonated soft drinks** from **small, neighborhood stores**, be they kiosks, boutiques, over-the-counter or self-service?



The Overlap Buyers are more intensive in current Cola purchase, especially with more water and beer. Bucharest shoppers have fewer items.



Base: all respondents; **Total**: Total (n=736), Coca-Cola & Pepsi overlap (n=253), Coca-Cola exclusives (n=243), Pepsi exclusives (n=240)/ **Bucharest**: Total (n=363) / **Large Urban**: Total (n=373)

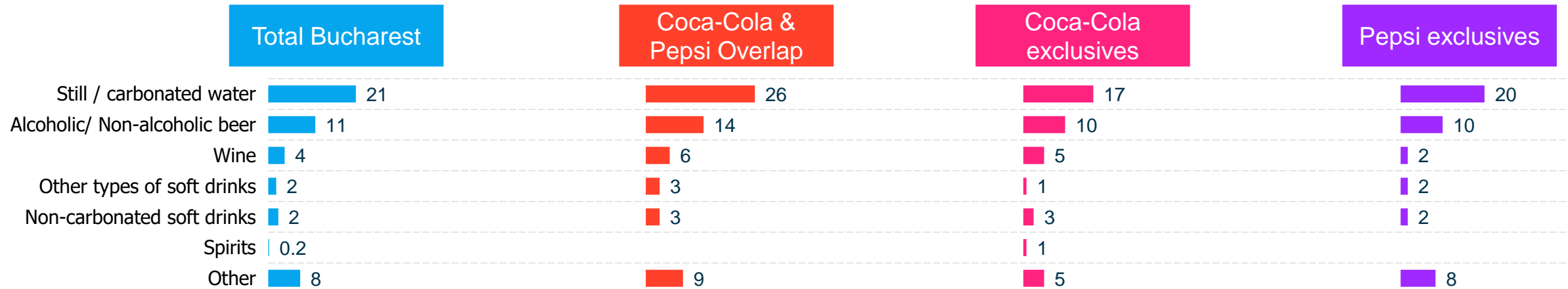
S04. Which of the following types of drinks did you buy during this store visit?

Significantly higher / lower than Total

Overlap buyers are significantly more intensive in Large urban.

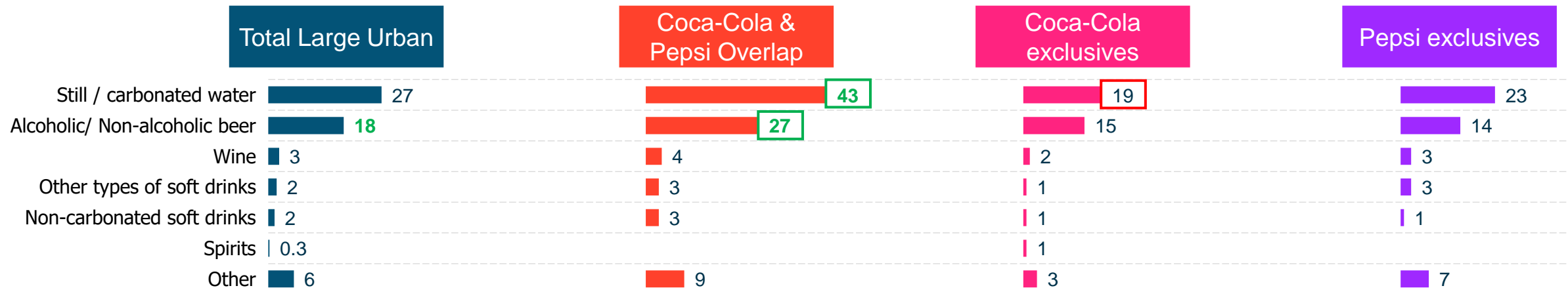
### Beverages bought in current shopping trip, %

Bucharest



  /   Significantly higher / lower than Total Bucharest

Large Urban



  /   Significantly higher / lower than Total Large Urban

Base: all respondents; **Bucharest**: Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/

**Large Urban**: Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

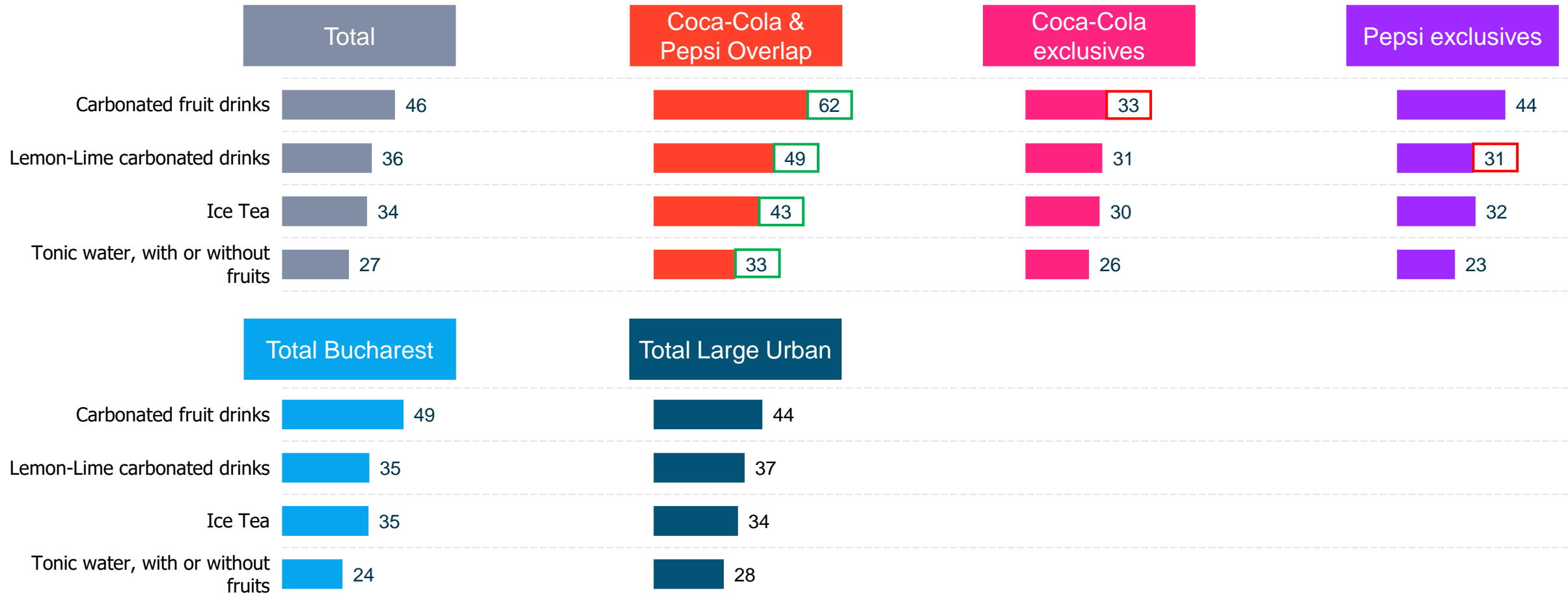
S04. Which of the following types of drinks did you buy during this store visit?

XX / XX Significantly higher / lower than same group in Bucharest



The overlap buyers report significantly higher intensity in SSD as well, both in total and inside Bucharest and Large urban.

### SSD consumed more than once a month, %

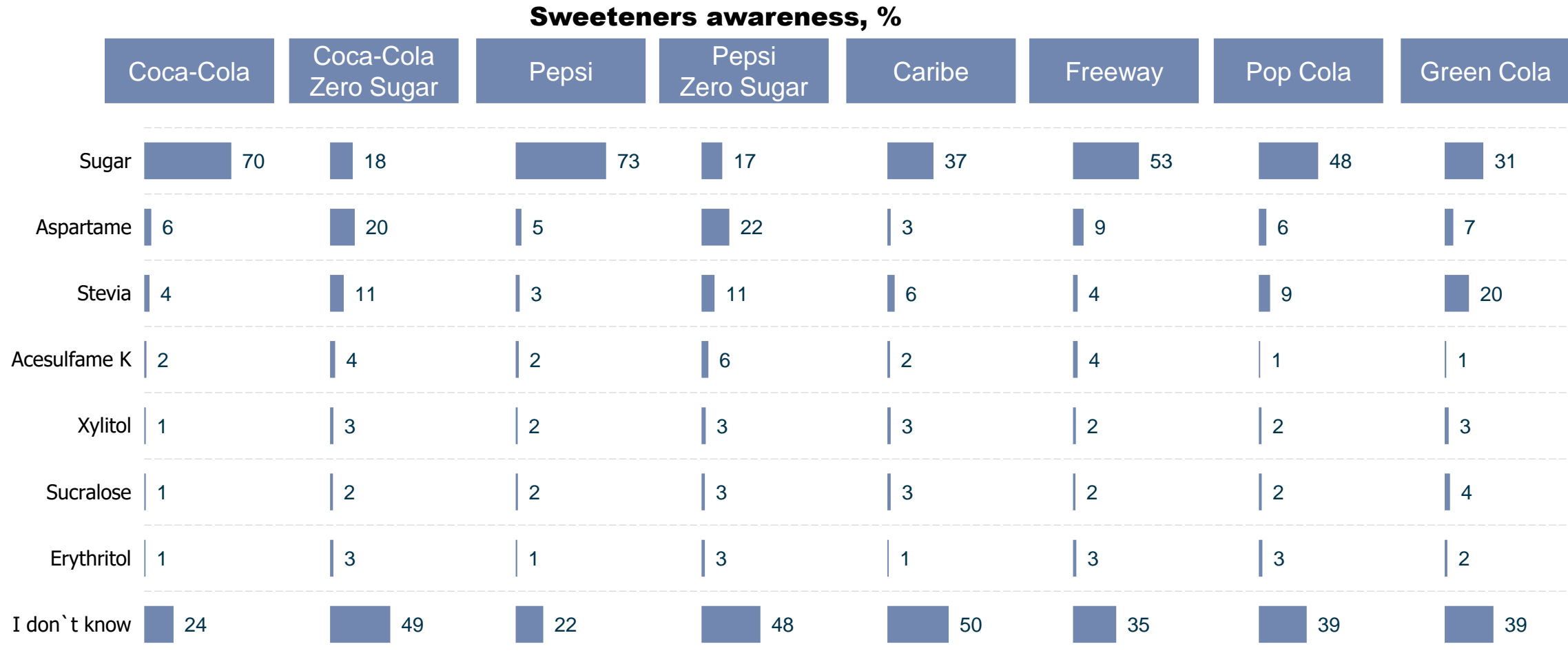


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S01. Which of the following types of **carbonated soft drinks** do you consume at least once a month or more often?

Significantly **higher** / **lower** than Total

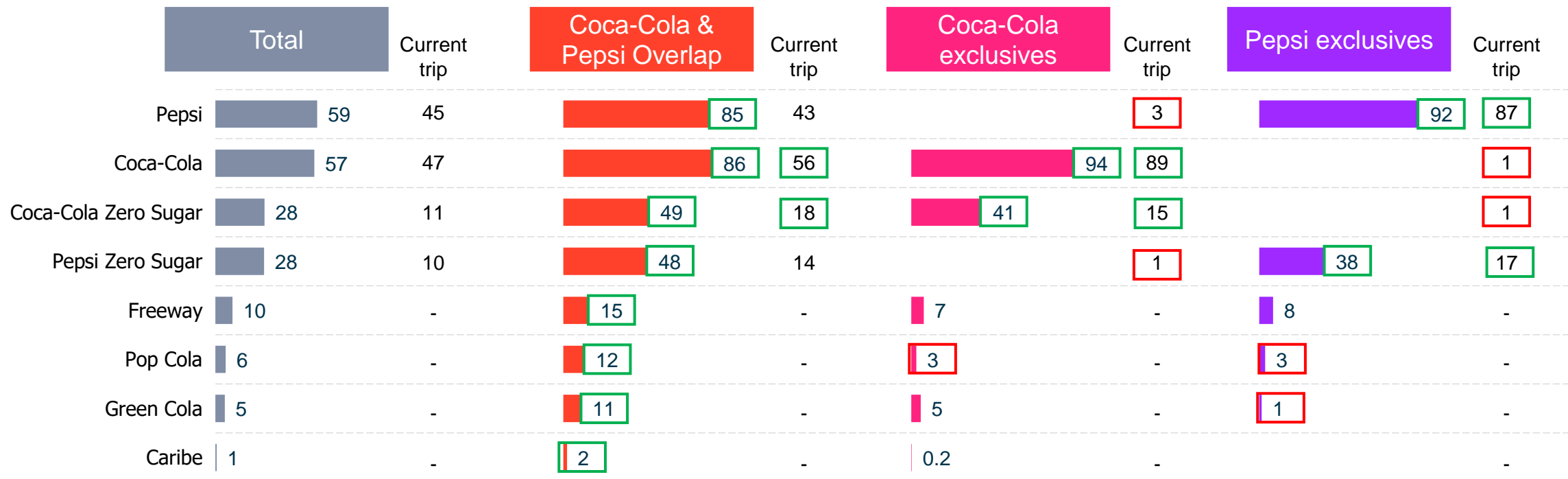
Most consumers think Pepsi contains sugar. Close to half consumers aware of Zero variants declare not knowing what type of sweetener is used, and close to 1 in 5 think it's sugar.



## **2.2. Drivers of current purchase**

Overlap buyers consume both Coca-Cola and Pepsi, but also significantly more other cola brands.

### Cola brands consumed in P3M and purchased in current trip, %



Base: all respondents; **Total**: Total (n=736), Coca-Cola & Pepsi overlap (n=253), Coca-Cola exclusives (n=243), Pepsi exclusives (n=240)

S02. Which of the following brands of cola have you consumed in the **last 3 months**?

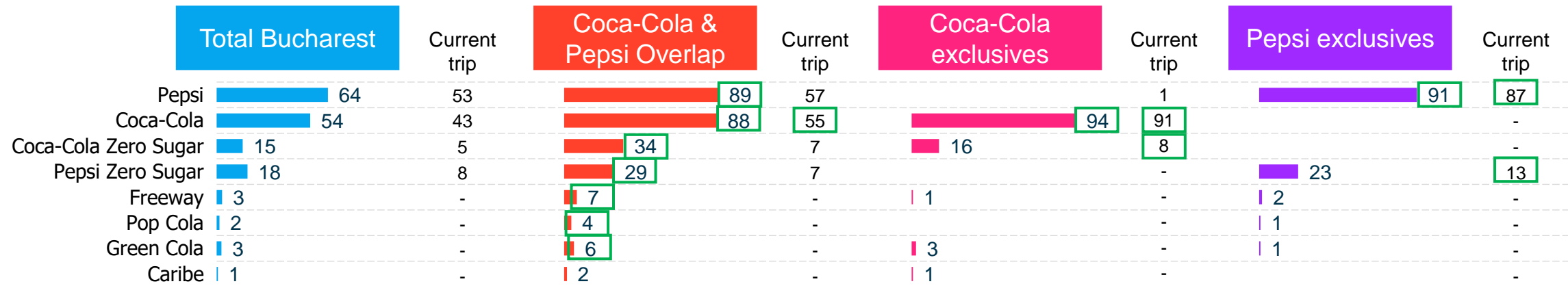
S05. You said you just bought carbonated soft drinks. What brands of carbonated soft drinks did you buy on this visit to the store?

  /   Significantly **higher** / **lower** than Total

## The Large Urban overlap buyers report highest brand portfolio.

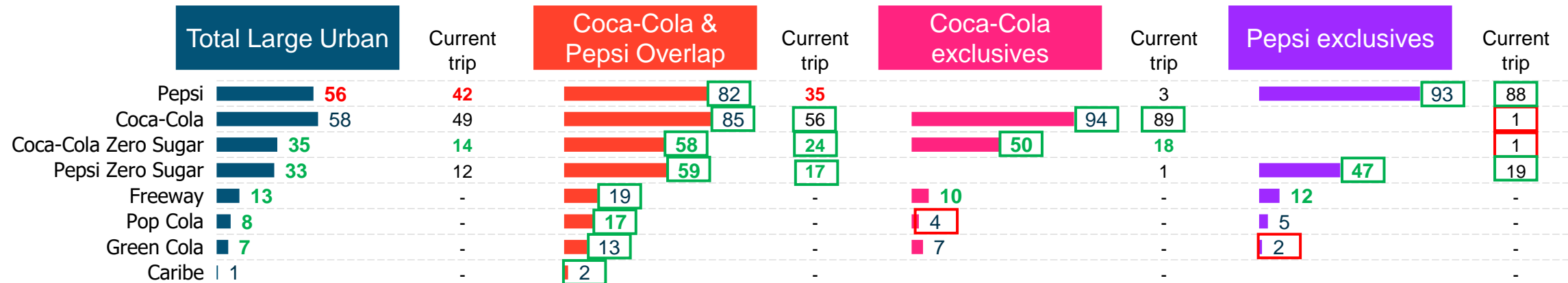
### Cola brands consumed in P3M and purchased in current trip, %

Bucharest



Significantly higher / lower than Total Bucharest

Large Urban



Significantly higher / lower than Total Large Urban  
XX / XX Significantly higher / lower than same group in Bucharest

Base: all respondents; **Bucharest:** Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/

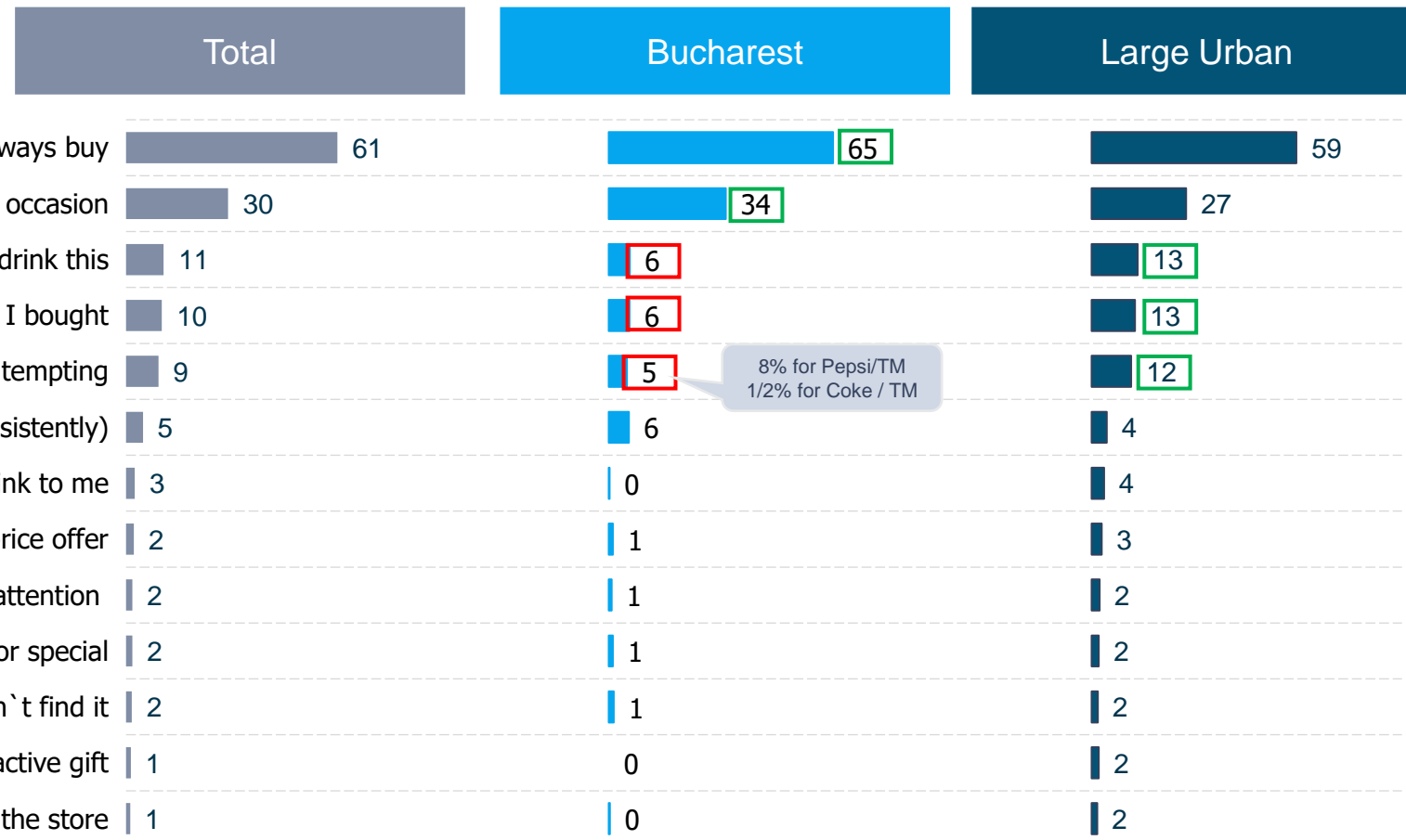
**Large Urban:** Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

S02. Which of the following brands of **coke** have you consumed in the **last 3 months**?

S05. You said you just bought carbonated soft drinks. What brands of carbonated soft drinks did you buy on this visit to the store?

Loyalty and fit with the occasion are main direct drivers of purchase, significantly higher in Bucharest. In Large urban, friends' preferences, placement in store and price are more important.

### Reasons for current purchase, %



Higher product loyalty and lower price influence for Coca-Cola in Bucharest vs Large urban, same for Pepsi.

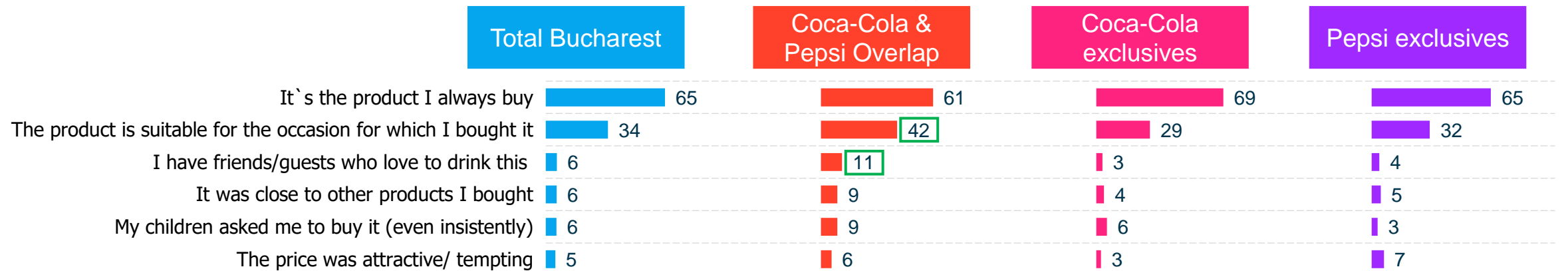
Higher influence of friends' preferences for both brands in Large urban vs. Bucharest.

Higher product placement importance for Pepsi in Large Urban vs Bucharest.

In Bucharest, overlap buyers more driven by occasion and friends' preferences than total.  
 Exclusives from Large urban more pragmatic than those in Bucharest: higher role of placement and price.

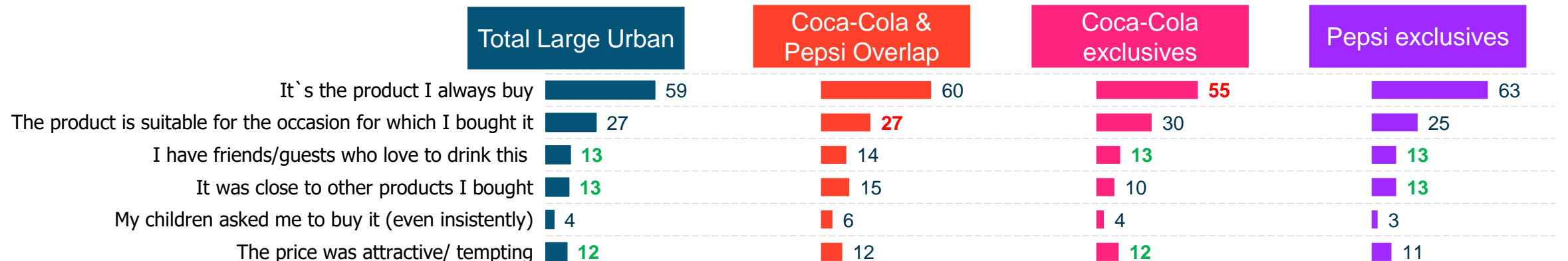
### Reasons for current purchase, %

Bucharest



  /   Significantly higher / lower than Total Bucharest

Large Urban



  /   Significantly higher / lower than Total Large Urban  
 XX / XX Significantly higher / lower than same group in Bucharest

Base: all respondents; **Bucharest:** Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/  
**Large Urban:** Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)  
 PL01. Where in the store did you get this product from?



Immediate consumption is main shopping mission, even higher in Bucharest. Shopping for fresh basic foods more frequent among overlap buyers.

### Shopping mission of current trip, %



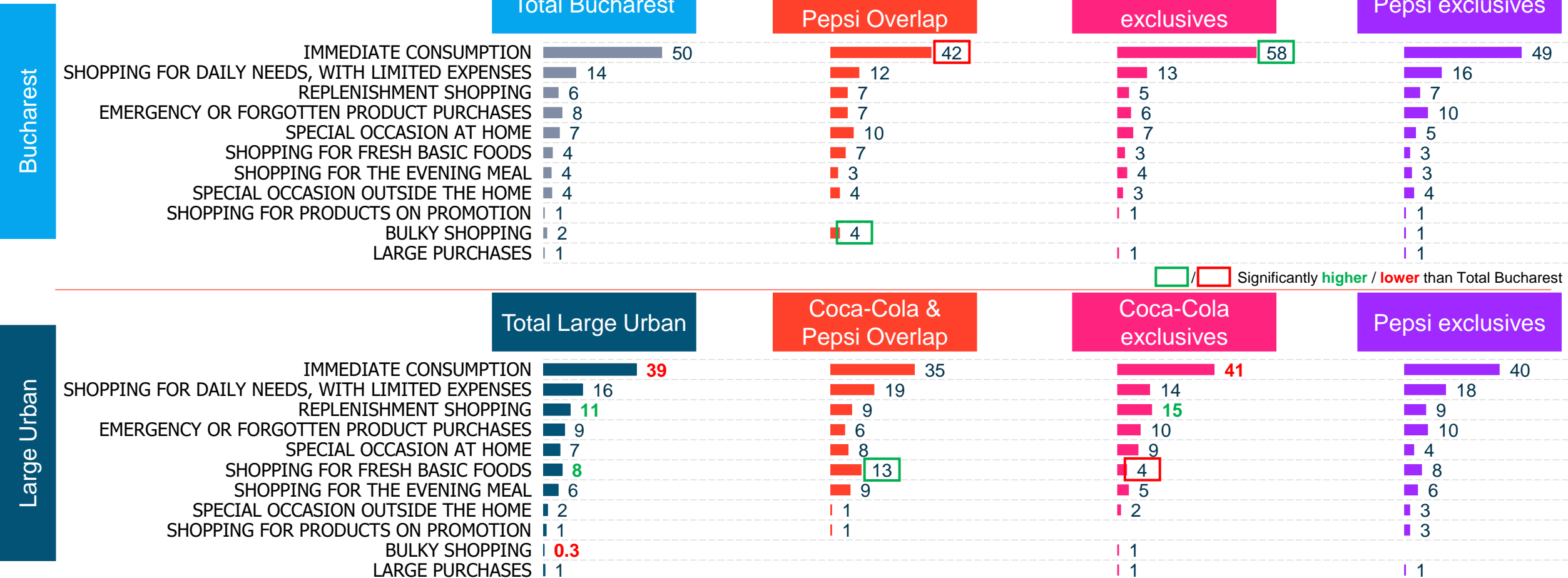
For Total, there are no significant differences in main shopping missions by brand purchased. Shopping for promo is slightly higher for Pepsi, but at only 2%.

The shopping missions do not differ for the two brands TM in Bucharest either. Coca-Cola Original Taste is slightly higher in bulky shopping missions at 3%.

Shopping missions are uniform across Large urban as well, except larger promo shopping for Pepsi TM at 2%.

Bucharest overlap buyers can be targeted in more diverse shopping missions, while in Large Urban, shopping for fresh basic food is more important for them.

### Shopping mission of current trip, %



Base: all respondents: **Bucharest:** Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/

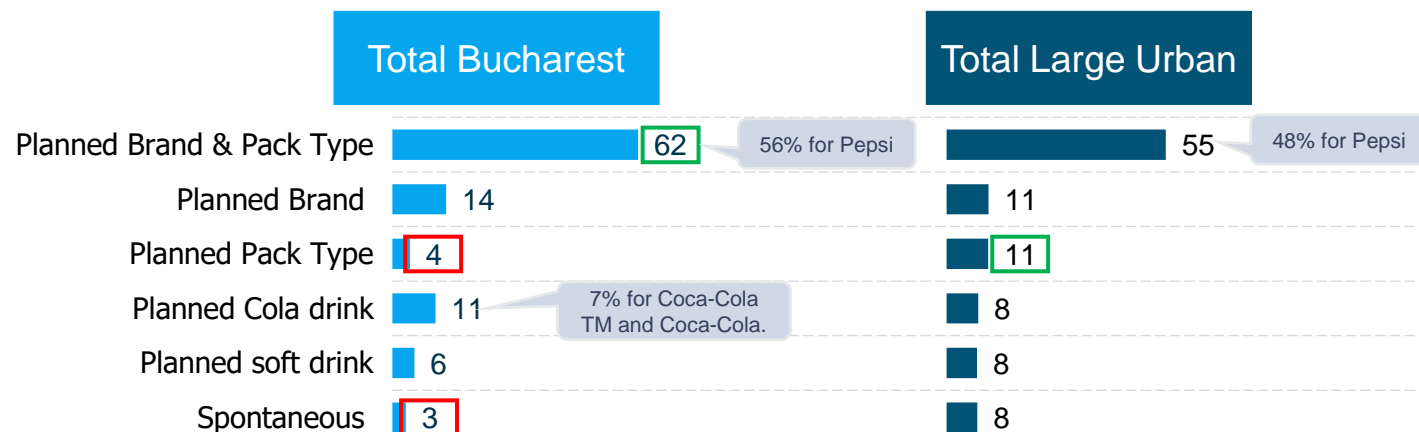
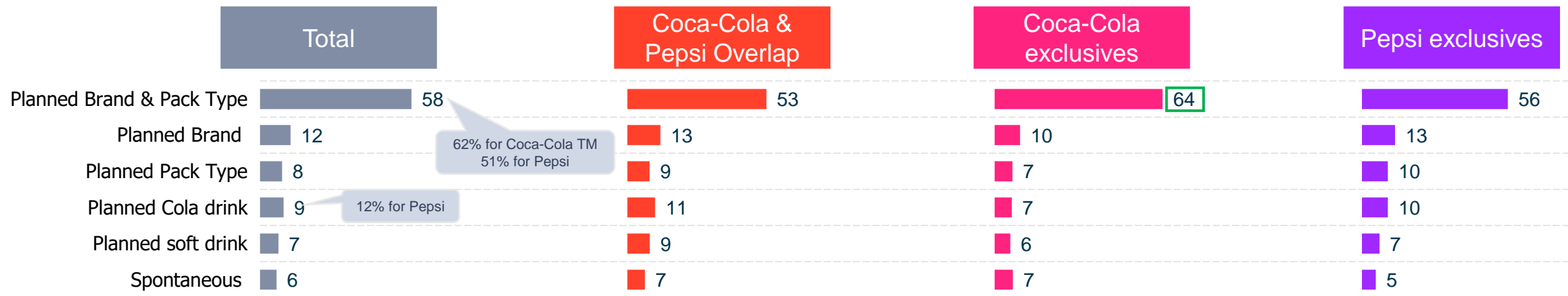
**Large Urban:** Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

SM02. And what was the main reason for these purchases?

XX / XX Significantly higher / lower than same group in Bucharest   /   Significantly higher / lower than Total Large Urban

Most purchases are planned in detail, especially among Coca-Cola exclusives and Bucharest shoppers. The opportunities for in-store brand-choice are lower in Bucharest.

### Purchase planning, %



By brand, Coca-Cola TM has a planned purchase significantly higher than Total at 62%, while Pepsi is over-represented among those that only planned for a cola, but has lower planned purchase.

In Bucharest, Pepsi is less planned and Coca-Cola is under-represented in cola drink plan. Same for Pepsi in Large urban.

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PP01. Thinking about this product you bought ... were you going to buy this product before entering the store?

Significantly higher / lower than Total

Purchase planning is higher among overlap buyers from Bucharest than for those in Large urban, while the later plan for the category – soft drinks.

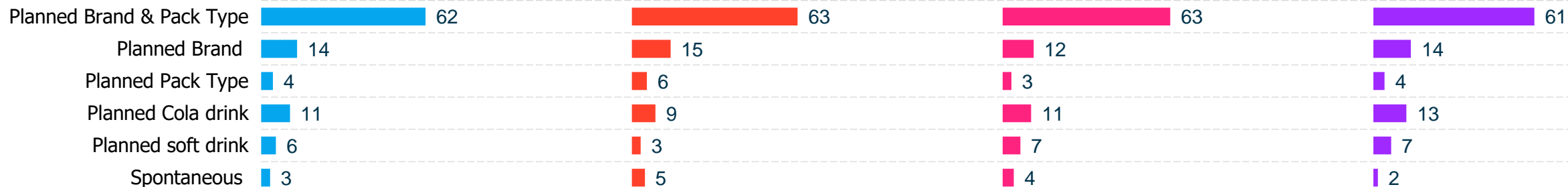
### Purchase planning, %

#### Total Bucharest

#### Coca-Cola & Pepsi Overlap

#### Coca-Cola exclusives

#### Pepsi exclusives



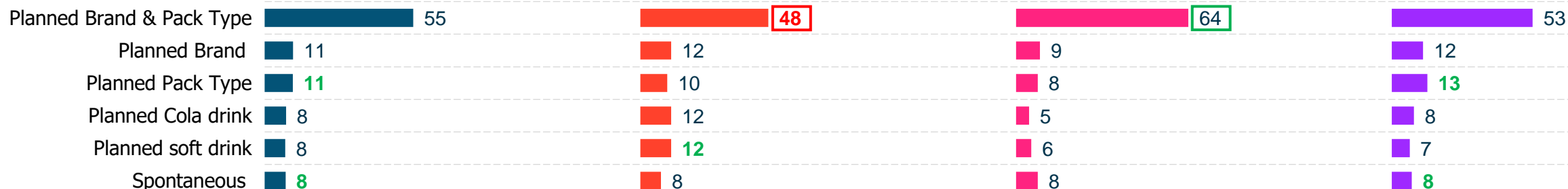
Significantly higher / lower than Total Bucharest

#### Total Large Urban

#### Coca-Cola & Pepsi Overlap

#### Coca-Cola exclusives

#### Pepsi exclusives



XX / XX Significantly higher / lower than same group in Bucharest

Significantly higher / lower than Total Large Urban

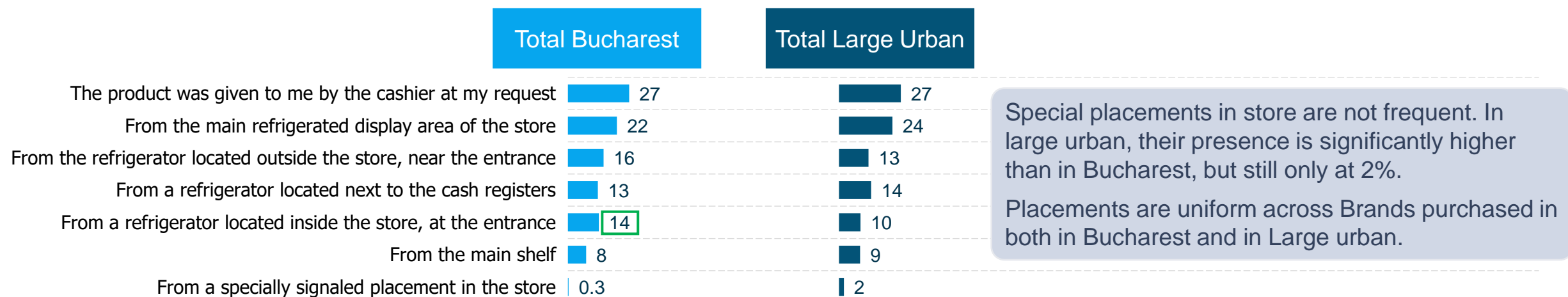
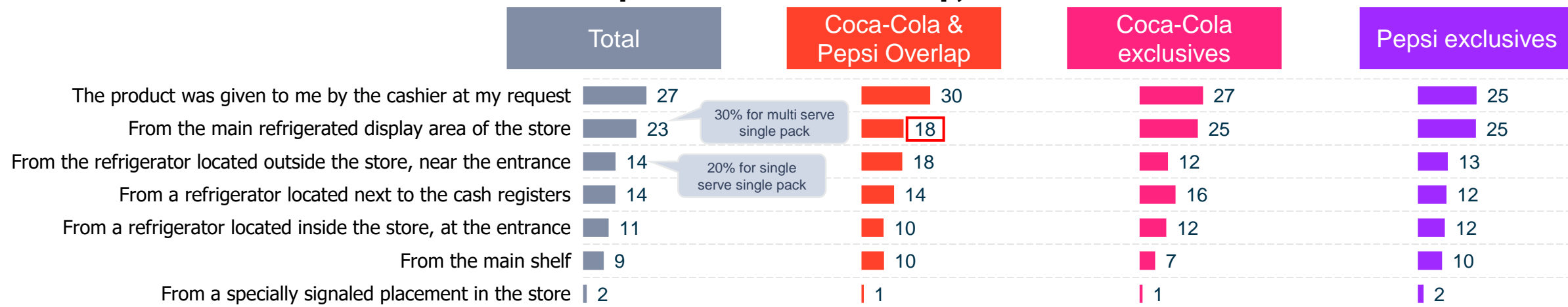
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PP01. Thinking about this product you bought ... were you going to buy this product before entering the store?

Refrigerators are by far most frequent placements, followed by the direct service by the cashiers. Refrigerators at store entrance are more important in Bucharest.

### Store placement in current trip, %



Base: all respondents; **Total**: Total (n=736), Coca-Cola & Pepsi overlap (n=253), Coca-Cola exclusives (n=243), Pepsi exclusives (n=240) / **Bucharest**: Total (n=363) / **Large Urban**: Total (n=373)

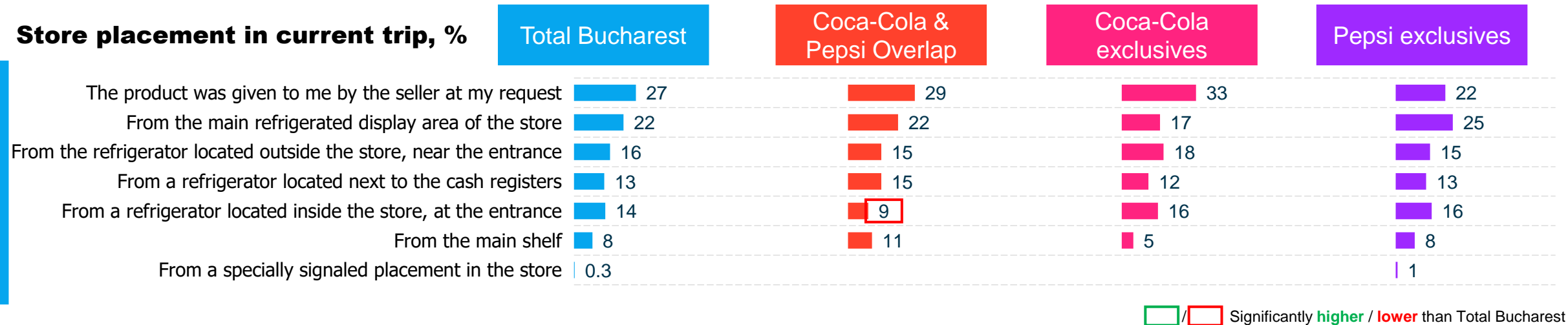
PL01. Where in the store did you get this product from?

Significantly higher / lower than Total

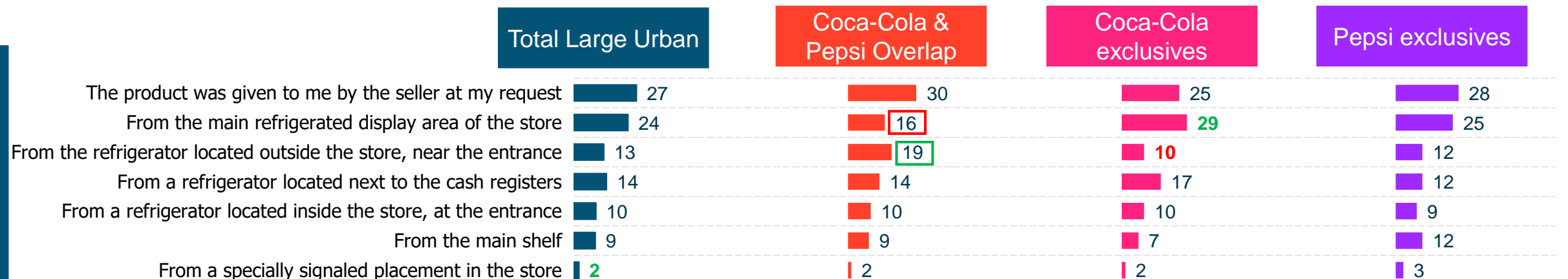
In Bucharest, overlap buyers shop less from refrigerators at store entrance. In Large urban, they shop more from outside refrigerators.

### Store placement in current trip, %

Bucharest



Large Urban



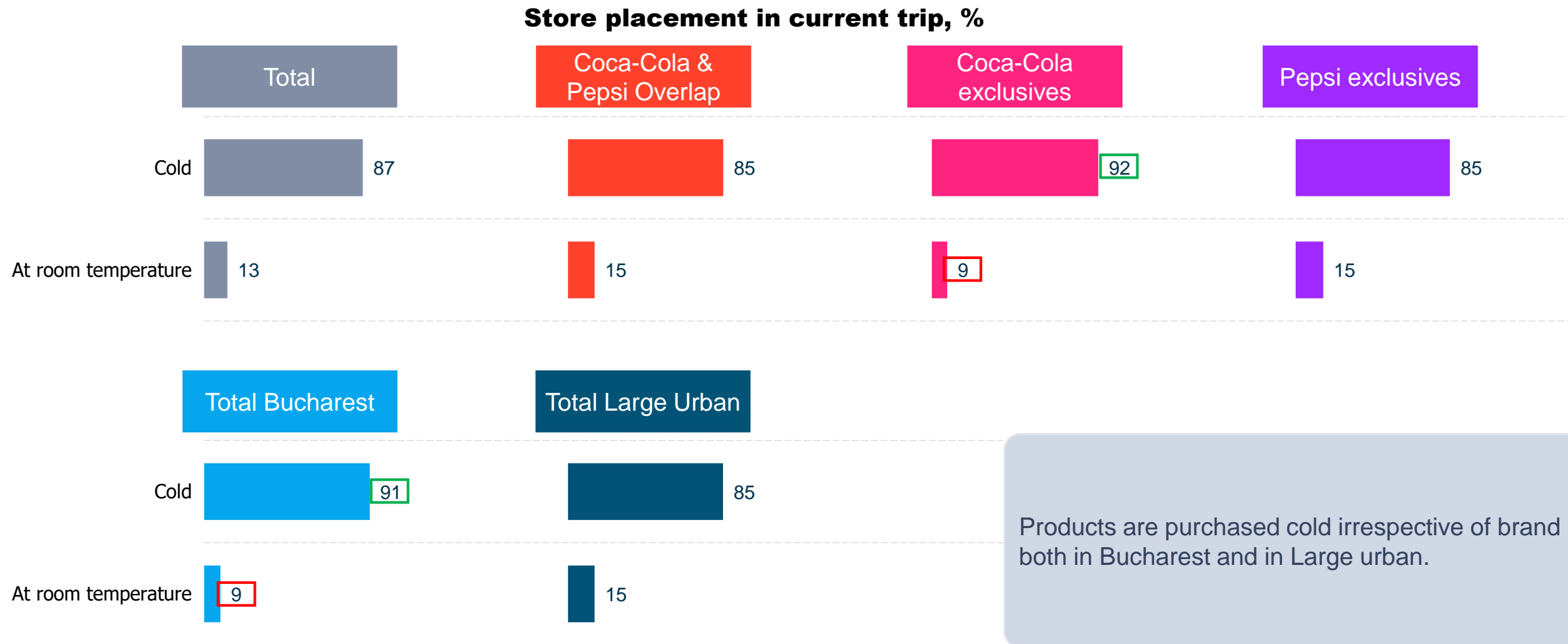
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**Large Urban:** Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

PL01. Where in the store did you get this product from?

XX / XX Significantly higher / lower than same group in Bucharest Significantly higher / lower than Total Large Urban

Bucharest and Coke exclusive shoppers buy their colas cold more than the rest.



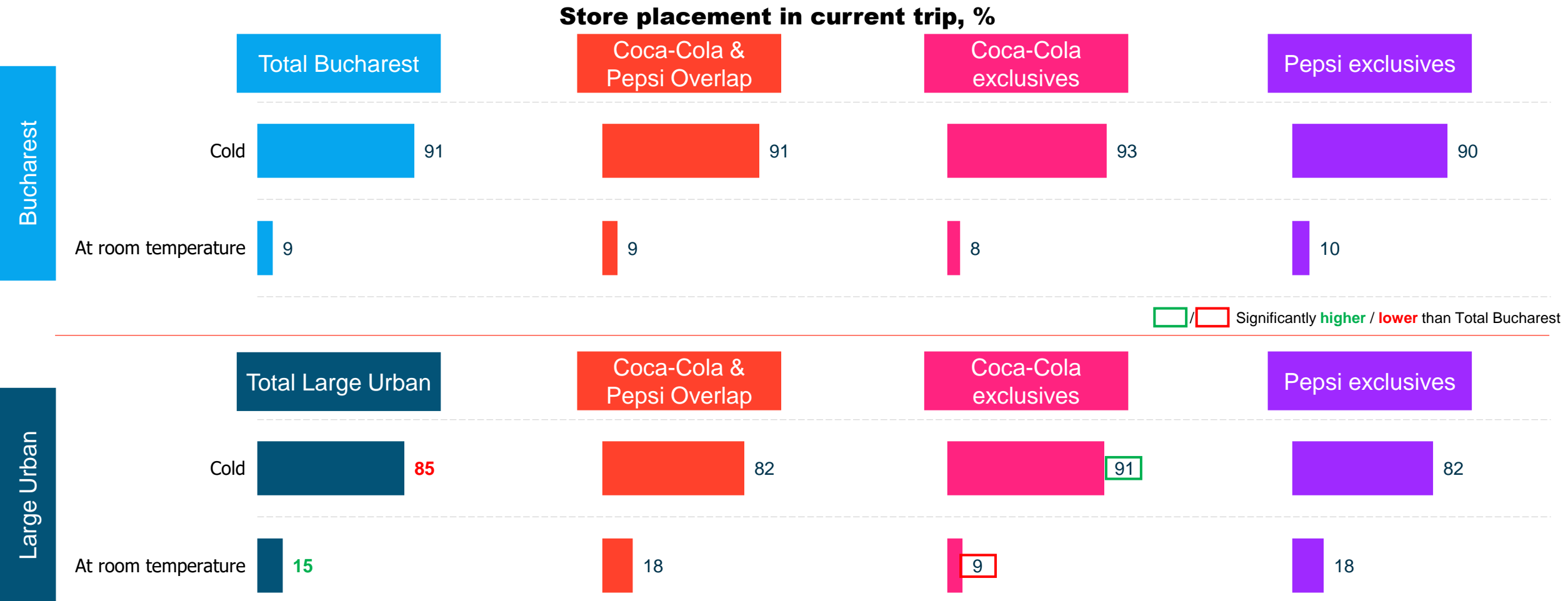
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PL02. When you took the product, it was...

Significantly higher / lower than Total



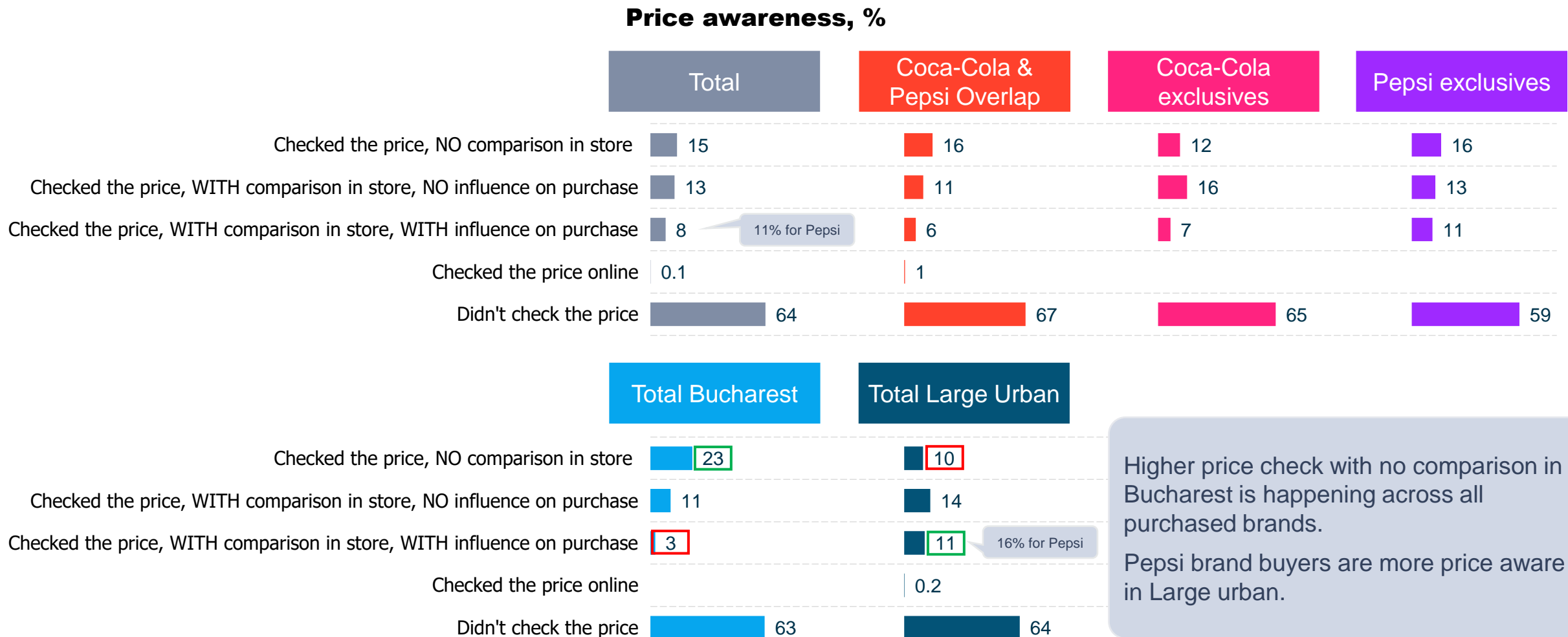
All Bucharest targets buy their colas cold, while in Large urban this is all the more important for Coca-Cola exclusives.



Base: all respondents; **Bucharest:** Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/  
**Large Urban:** Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)  
PL02. When you took the product, it was...

  /   Significantly higher / lower than Total Large Urban  
XX / XX Significantly higher / lower than same group in Bucharest

Most consumers are not checking prices at all. In Bucharest, there is a slightly higher price check with no comparison in store, while it is lower in Large urban.

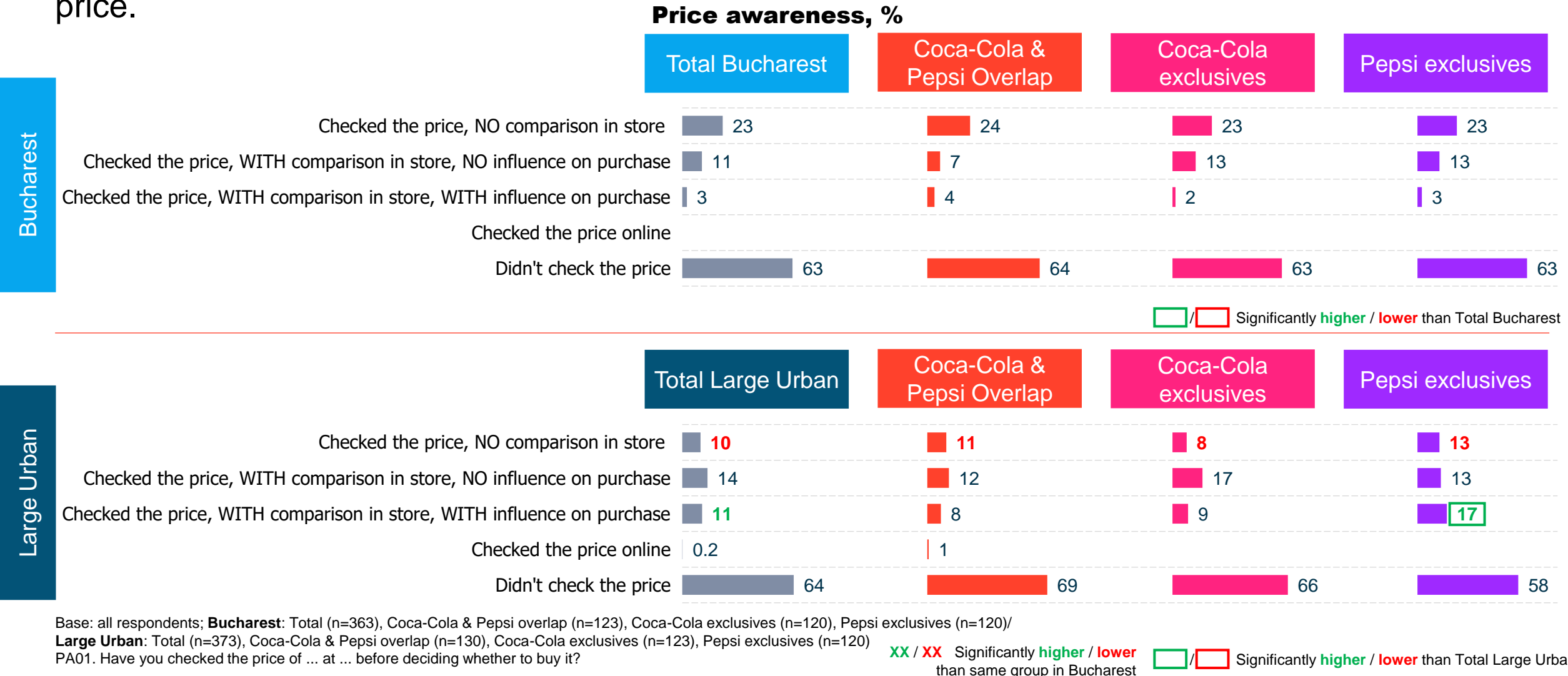


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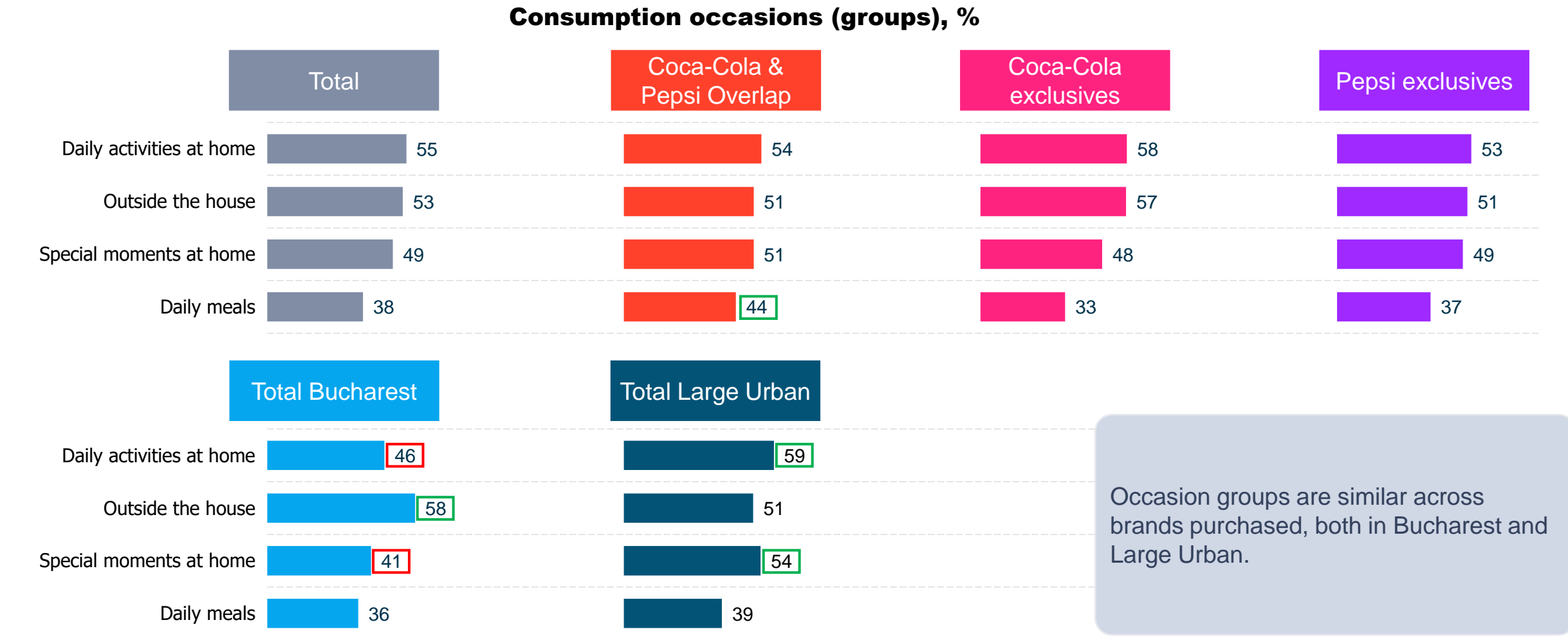
PA01. Have you checked the price of ... at ... before deciding whether to buy it?

Significantly higher / lower than Total

In Bucharest, shoppers are similarly price aware, but the Overlap and Coca-Cola exclusives check prices more than their Large urban peers. In Large Urban, Pepsi exclusives are more influenced by price.



In Bucharest, shoppers are more in out of home occasions, while in Large urban they are more inclined to in-home. Daily meals are a more important occasion for overlap buyers.



Base: all respondents; **Total:** Total (n=736), Coca-Cola & Pepsi overlap (n=253), Coca-Cola exclusives (n=243), Pepsi exclusives (n=240) / **Bucharest:** Total (n=363) / **Large Urban:** Total (n=373)  
CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought?  
Significantly higher / lower than Total

Daily meals especially important to Large urban overlap buyers. More in-home for Large urban Coca-Cola exclusives. Special moments at home more among Large Urban Pepsi exclusives.

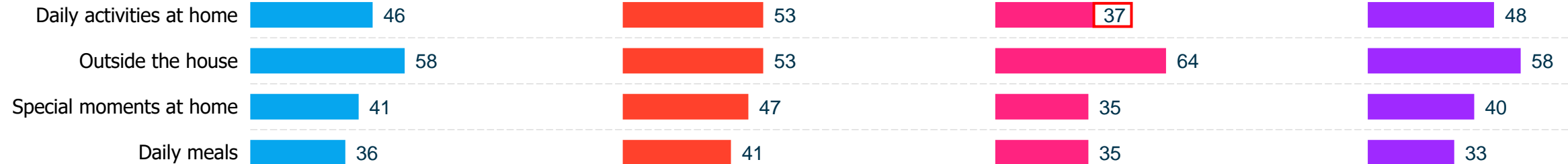
### Consumption occasions (groups), %

#### Total Bucharest

#### Coca-Cola & Pepsi Overlap

#### Coca-Cola exclusives

#### Pepsi exclusives



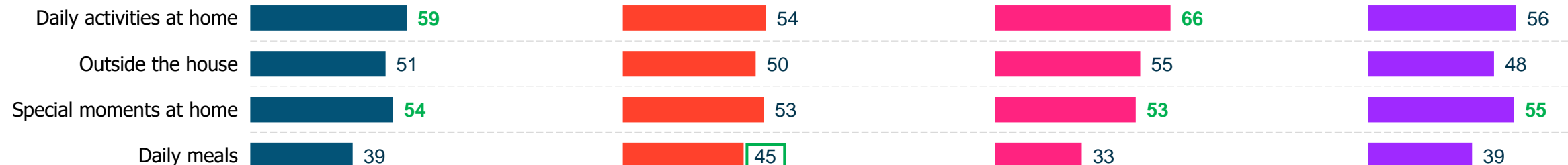
 /  Significantly higher / lower than Total Bucharest

#### Total Large Urban

#### Coca-Cola & Pepsi Overlap





#### Coca-Cola exclusives

#### Pepsi exclusives

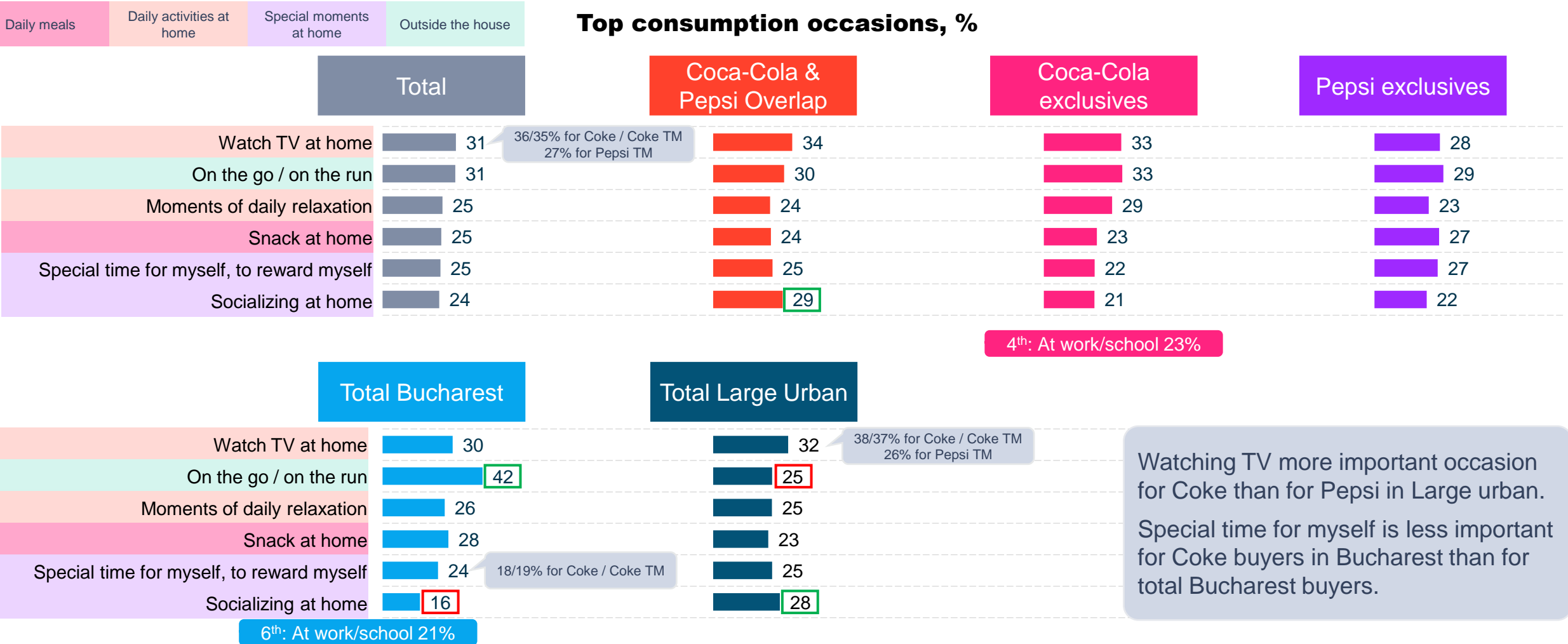


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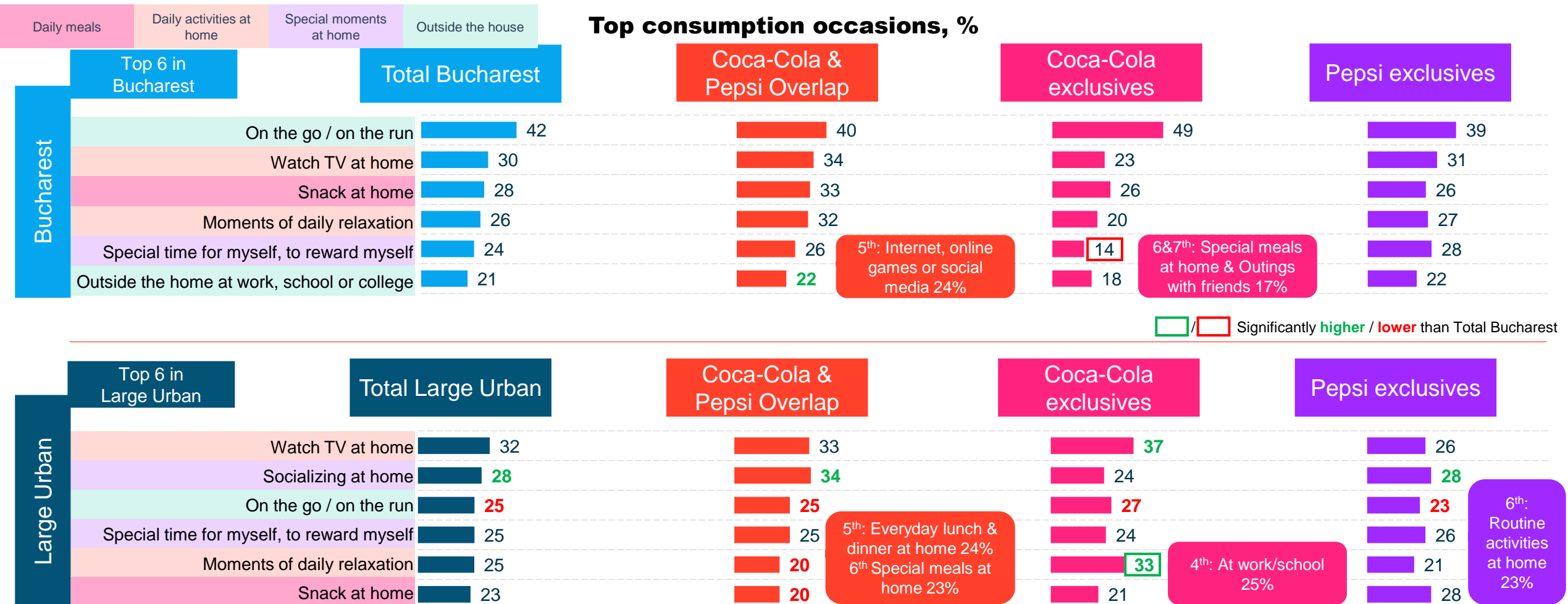
**Large Urban**: Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought?  /  Significantly higher / lower than same group in Bucharest  /  Significantly higher / lower than Total Large Urban

Among top consumption occasions, the overlap buyers stand out with higher socializing at home. In Bucharest, on the go is most important. In Large urban, higher importance of socializing at home.



Bucharest stands out with more on the go/on the run across all targets, while Large urban with socializing at home, especially among overlap and Pepsi exclusives.



Base: all respondents; **Bucharest**: Total (n=363), Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/

**Large Urban**: Total (n=373), Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought? XX / XX Significantly higher / lower than same group in Bucharest   /   Significantly higher / lower than Total Large Urban



Across all consumption occasions, main difference between Large urban and Bucharest comes from on the go vs. socializing at home, work & study at home.

Daily meals	Daily activities at home	Special moments at home	Outside the house
Consumption occasions, %			
		Total Bucharest	Total Large Urban
On the go / on the run		42	25
Watch TV at home		30	32
Snack at home		28	23
Moments of daily relaxation		26	25
Special time for myself, to reward myself		24	25
Outside the home at work, school or college		21	17
Special meals at home		17	20
Internet, online games or social media		16	16
Everyday lunch and dinner at home		16	15
Socializing at home		16	28
Routine activities at home		16	19
Outings with friends		13	16
Work or study at home		7	14
Outside the house to play sports		5	10
Energizing breakfast		4	3
Nutritious breakfast		4	5
Fitness, sports or recovery after exercise at home		2	6

Base: all respondents; **Bucharest**: Total (n=363), **Large Urban**: Total (n=373)

CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought?

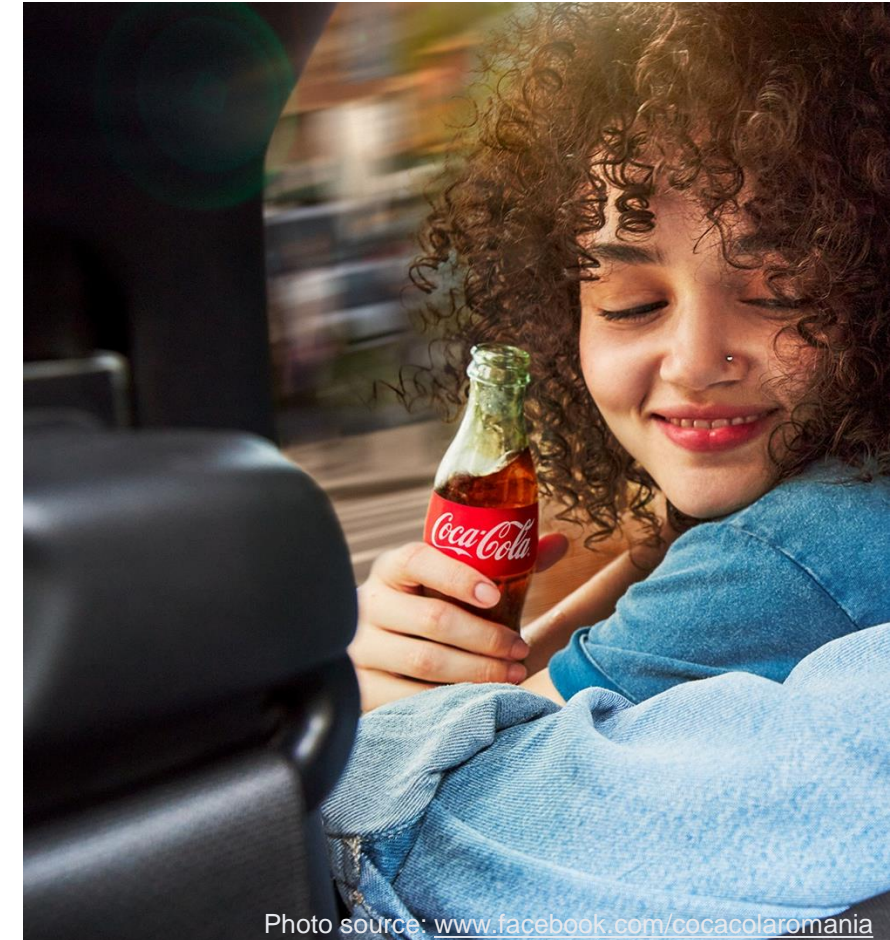


Photo source: [www.facebook.com/cocacolaromania](https://www.facebook.com/cocacolaromania)

XX / XX Significantly **higher** / **lower**  
than same group in Bucharest

Most notable differences between the targets in Bucharest and Large urban come from outside the house occasions and daily activities in-home.

Daily meals    Daily activities at home    Special moments at home    Outside the house

Consumption occasions, %	Coca-Cola & Pepsi Overlap Bucharest (n=123)	Coca-Cola & Pepsi Overlap Large Urban (n=130)
On the go / on the run	40	25
Snack at home	33	20
Moments of daily relaxation	32	20
Outside the home at work, school or college	22	10
Socializing at home	21	34
Outings with friends	9	19
Outside the house to play sports	6	15

Consumption occasions, %	Coca-Cola Exclusives Bucharest (n=120)	Coca-Cola Exclusives Large Urban (n=123)
On the go / on the run	49	27
Watch TV at home	23	37
Moments of daily relaxation	20	33
Work or study at home	3	11
Outside the house to play sports	2	9

Consumption occasions, %	Pepsi Exclusives Bucharest (n=120)	Pepsi Exclusives Large Urban (n=120)
On the go / on the run	39	23
Socializing at home	12	28
Work or study at home	8	17



Base: all respondents

CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought?

XX / XX Significantly higher / lower than same group in Bucharest



Differences in occasions mostly come with different consumption habits between community types, and much less by brand purchased.

	Daily meals	Daily activities at home	Special moments at home	Outside the house
	Coca-Cola TM Purchase Bucharest (n=120)		Coca-Cola TM Purchase Large Urban (n=123)	
On the go / on the run	45		24	
Socializing at home	18		28	
Routine activities at home	9		16	
Work or study at home	5		12	
Outside the house to play sports	3		10	
	Pepsi TM Purchase Bucharest (n=120)		Pepsi TM Purchase Large Urban (n=120)	
On the go / on the run	40		26	
Socializing at home	14		28	
Work or study at home	9		17	
Fitness, sports or recovery after exercise at home	2		8	

XX / XX Significantly higher / lower than same group in Bucharest

Base: all respondents

CS01. What are the occasions, moments or situations that best describe how you want to consume this product you have just bought?

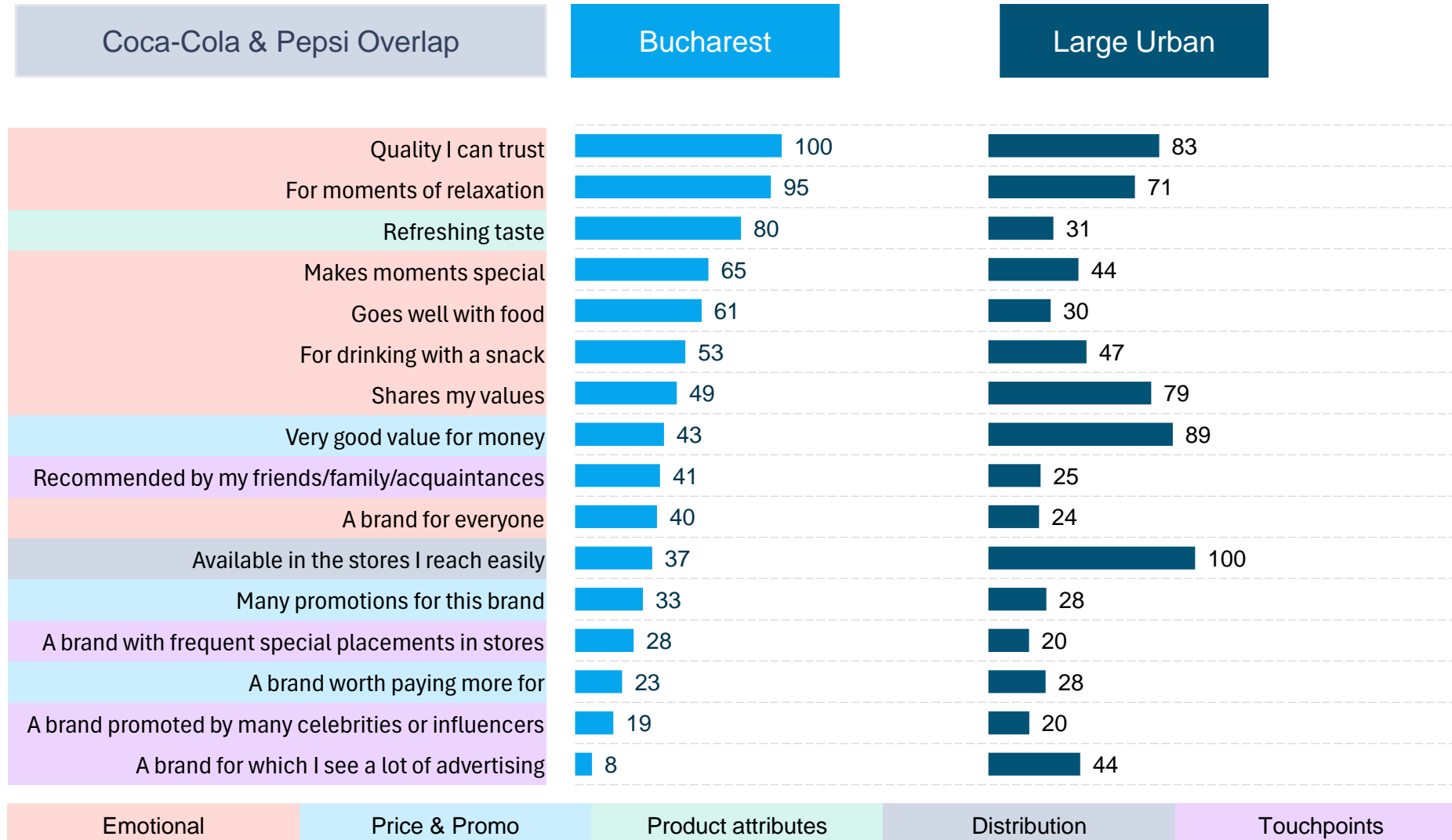
Consumption occasions, %	Coca-Cola TM Purchase Bucharest (n=120)	Pepsi TM Purchase Bucharest (n=120)
Routine activities at home	9	21
Energizing breakfast	2	6
	Coca-Cola TM Purchase Large Urban (n=123)	Pepsi TM Purchase Large Urban (n=120)
Watch TV at home	37	26



photo source: www.facebook.com/cocacolaromania

## **2.3. Drivers of preference and Brand image**

# Drivers of brand preference// Overlap Buyers



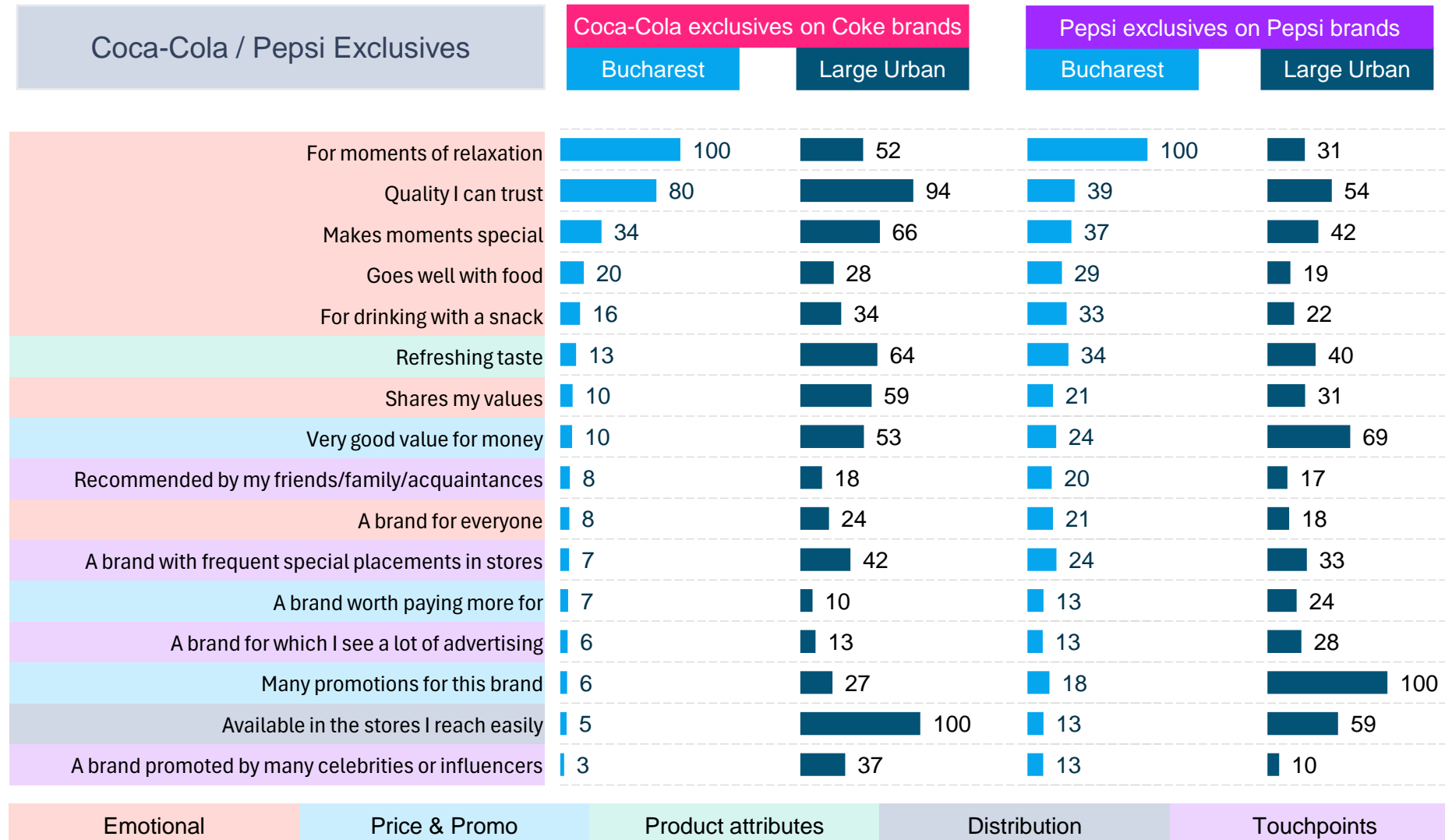
Bucharest Overlap Buyers are driven in their brand preference by **quality they can trust, for moments of relaxation and refreshing taste.**

Large Urban Overlap Buyers are driven by **distribution** first, followed by **value for money, quality they can trust and sharing values.**

⇒ In Bucharest, overlap buyers are more **emotional** and value **brand relationship.**

⇒ In Large Urban, overlap buyers are more **pragmatic** and succumb to distribution and look for value for money.

# Drivers of brand preference// Exclusives



Both Coca-Cola and Pepsi exclusives are driven most by **emotional** attributes in Bucharest: **moments of relaxation**. Coke has an additional driver: **trusted quality**.

This goes against the Large Urban exclusive buyers, who are, again, more pragmatic: buying Coke for **physical availability** and Pepsi for **frequent promo**.

Still, Coke buyers bring an emotional twist: second most important driver is **trusted quality**. For Pepsi, it is also pragmatic: **value for money**.

## Brand preference drivers, differentiators and performance

Bucharest: Coca-Cola & Pepsi Overlap

What drives brand preference



Coca-Cola  
zero SUGAR



(n=123)

(n=122)

(n=122)

(n=121)

(n=54)

(n=82)

(n=81)

(n=73)

Quality I can trust 100%

81

29

82

31

9

12

12

10

For moments of relaxation 95%

80

25

81

23

9

10

7

4

Refreshing taste 80%

86

39

88

38

13

21

15

18

Makes moments special 65%

69

21

77

22

11

10

12

7

Goes well with food 61%

76

22

83

25

17

16

10

11

For drinking with a snack 53%

75

33

78

32

11

12

11

10

Shares my values 49%

61

17

68

19

6

5

3

3

Very good value for money 43%

72

27

80

25

19

21

9

12

Recommended by my friends/family/acquaintances 41%

69

21

72

24

11

4

4

4

A brand for everyone 40%

80

26

80

27

24

13

12

8

Available in the stores I reach easily 37%

88

54

89

56

19

24

12

14

Many promotions for this brand 33%

57

16

58

12

7

9

4

4

A brand with frequent special placements in stores 28%

75

25

72

27

6

6

6

7

A brand worth paying more for 23%

44

11

47

9

6

2

3

6

A brand promoted by many celebrities or influencers 19%

59

21

57

23

13

4

4

1

A brand for which I see a lot of advertising 8%

70

34

62

36

9

5

9

6

The Sugar-Free version tastes good

6

58

7

55

1

1

6

Low in sugar

5

78

7

73

2

2

4

15

Emotional

Price & Promo

Product attributes

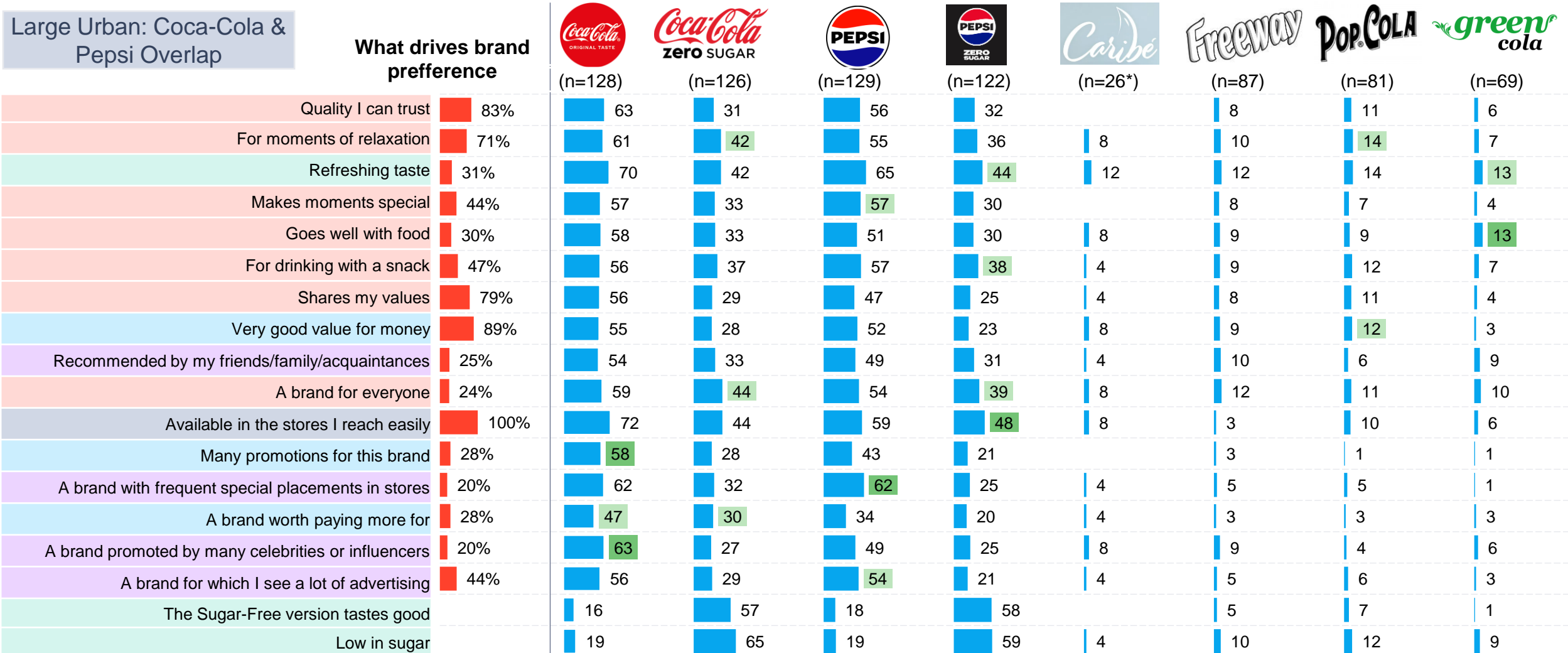
Distribution

Touchpoints

Base: n=... (aware of each brand)

BI. The following is a list of several statements regarding coke drinks. Thinking about each of the following statements below, please let me know which of the following brands you think each statement fits with.

## Brand preference drivers, differentiators and performance



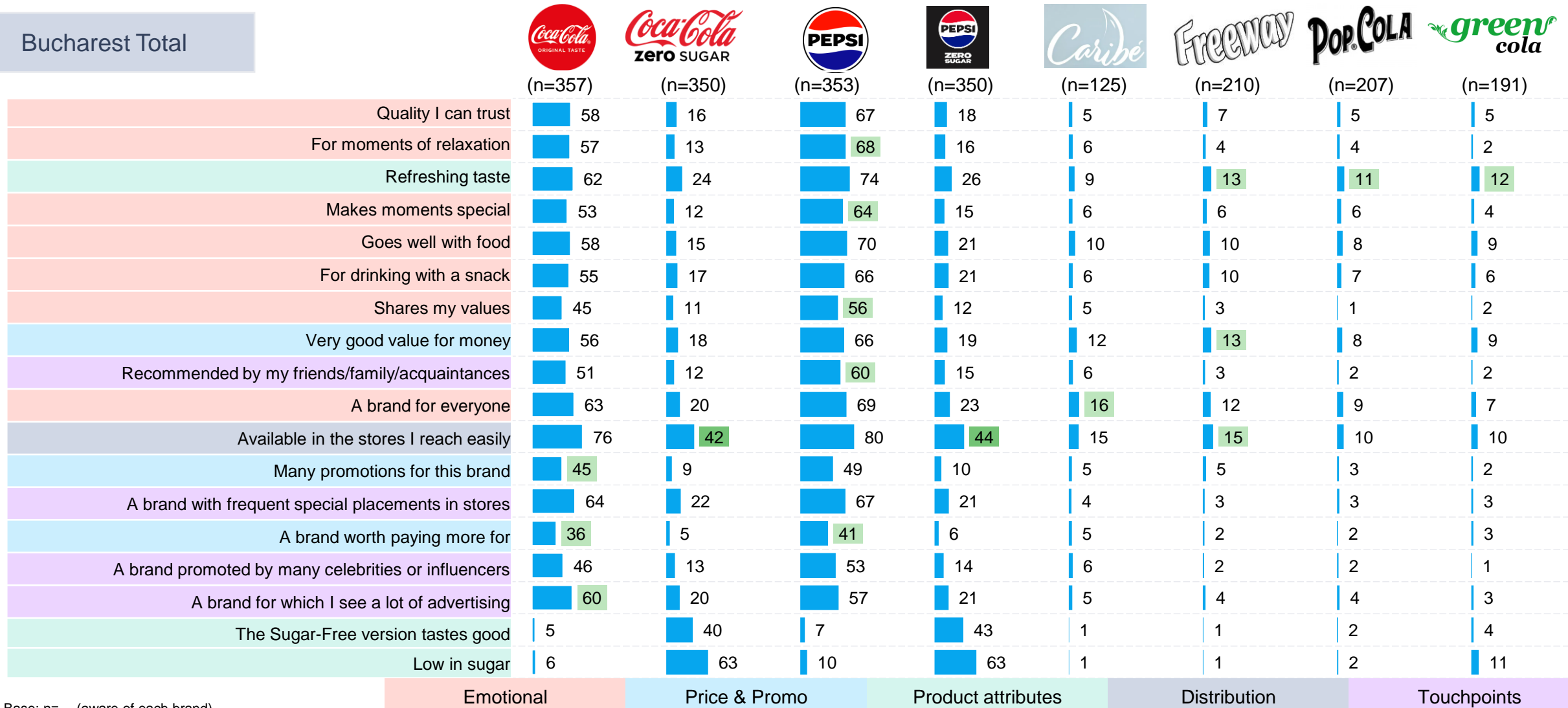
Base: n=... (aware of each brand)

BI. The following is a list of several statements regarding coke drinks. Thinking about each of the following statements below, please let me know which of the following brands you think each statement fits with.

\* Pay attention: small base (<30)

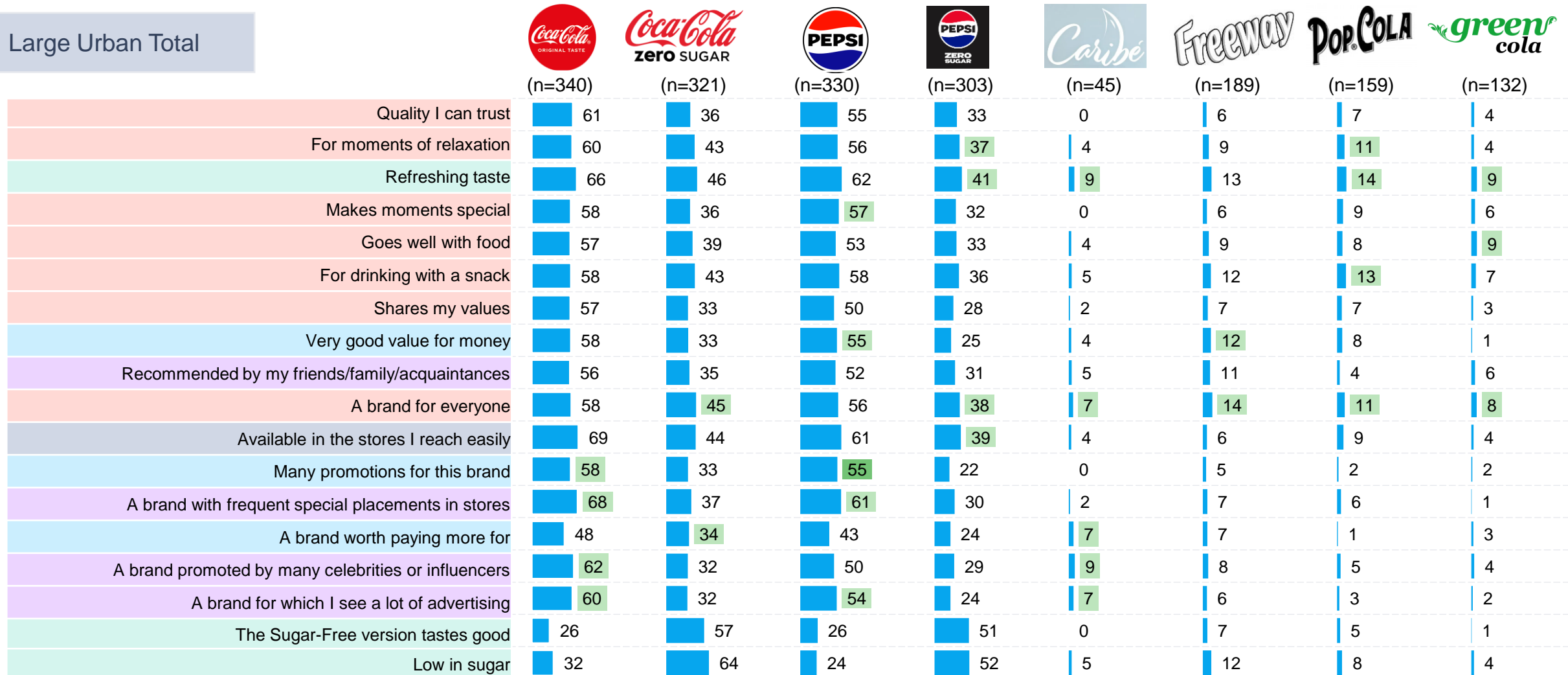


## Brand preference drivers, differentiators and performance



## Brand preference drivers, differentiators and performance

Large Urban Total



Emotional

Price & Promo

Product attributes

Distribution

Touchpoints

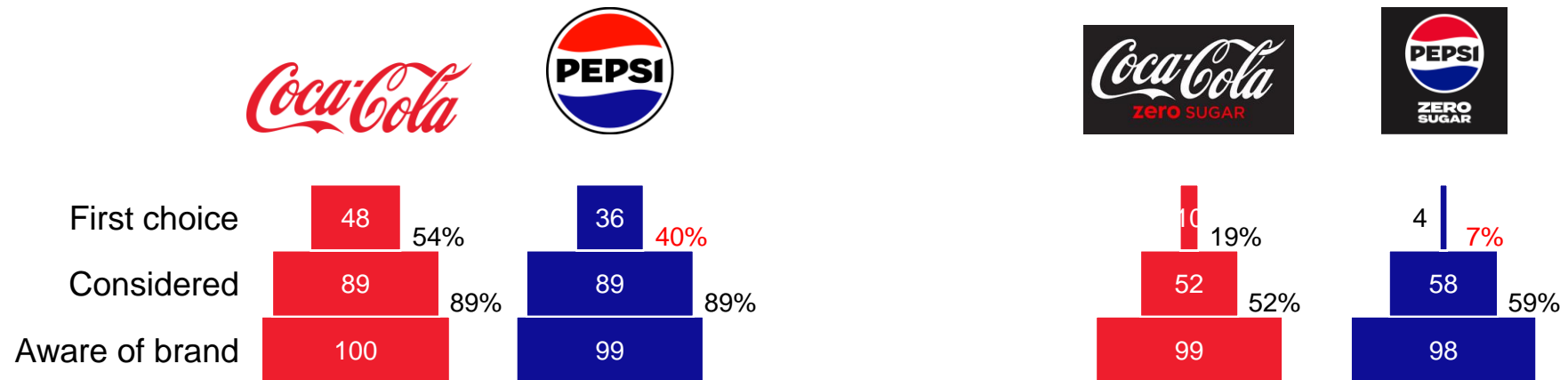
Base: n=... (aware of each brand)

BI. The following is a list of several statements regarding coke drinks. Thinking about each of the following statements below, please let me know which of the following brands you think each statement fits with.

Overlap Buyers have a higher preference for Coca-Cola and this is stronger in Large Urban.

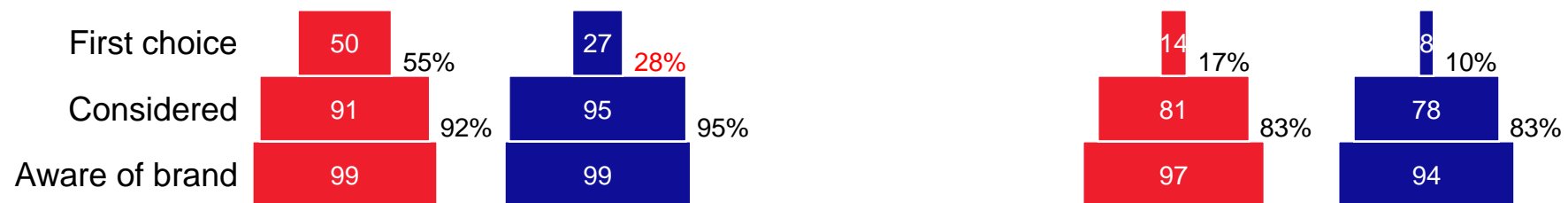
### Overlap Buyers

Bucharest



\*difference between 1<sup>st</sup> choice is significant at 90% confidence level.

Large Urban



Base: n= N=123 / 130

ABAW. Which of these cola brands do you know (whether or not you've consumed them)?

B01. Which of the following brands of coke...

xx% = conversion rates from one funnel level to the next

xx% Conversion rate **above** market average  
xx% Conversion rate **below** market average

Among their own exclusives, Coca-Cola and Pepsi have similar performance.

### Exclusive Buyers

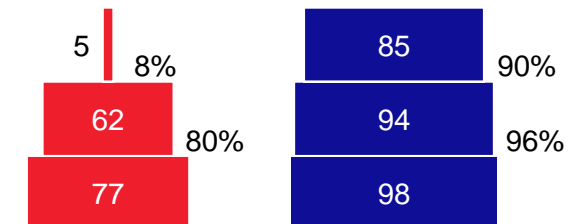
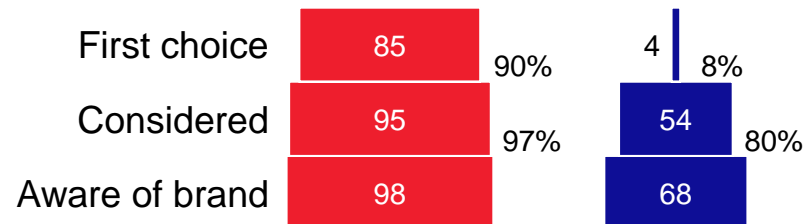
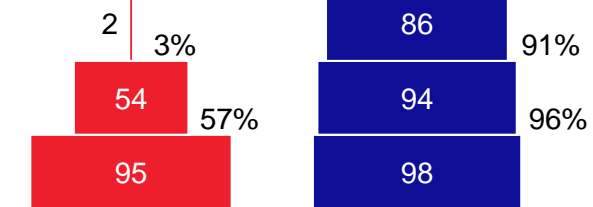
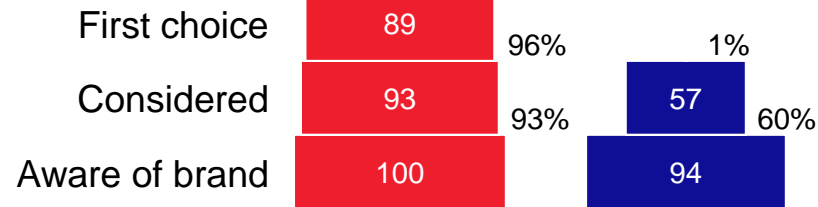
#### Coca-Cola exclusives

#### Pepsi exclusives

*Coca-Cola*



*Coca-Cola*



Base: n= 120 / 123 / 123 / 120

ABAW. Which of these cola brands do you know (whether or not you've consumed them)?

B01. Which of the following brands of coke...

xx% = conversion rates from  
one funnel level to the next

xx% Conversion rate **above** market average  
xx% Conversion rate **below** market average

# 3 Annexes

# Cola Dual Buyers' Demographic Profile

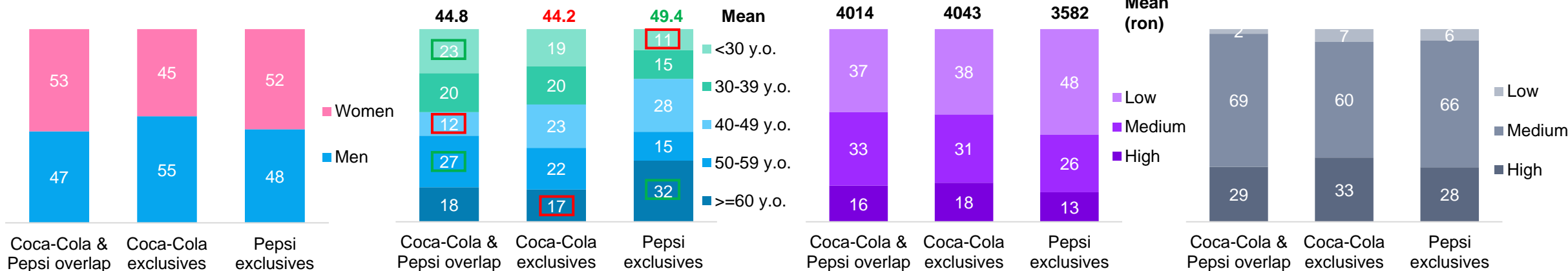
## Gender

## Age

## Personal Income

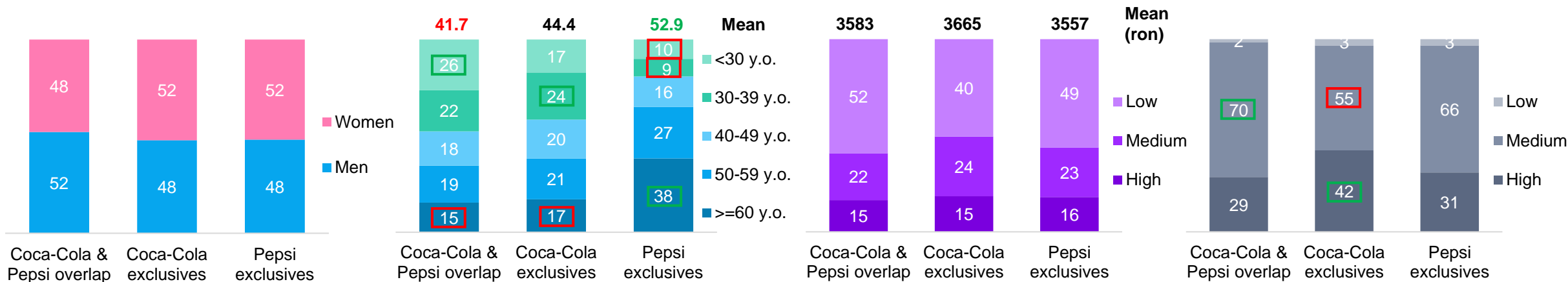
## Education

Bucharest



Significantly higher / lower than Total Bucharest

Large Urban



Significantly higher / lower than Total Large Urban

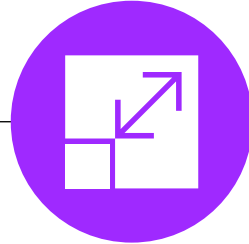
Base: all respondents; **Bucharest:** Coca-Cola & Pepsi overlap (n=123), Coca-Cola exclusives (n=120), Pepsi exclusives (n=120)/

**Large Urban:** Coca-Cola & Pepsi overlap (n=130), Coca-Cola exclusives (n=123), Pepsi exclusives (n=120)

# Deviations from expected values analysis explained



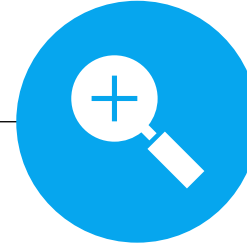
If a brand is market leader it is usually attributed more aspects, compared to smaller brands. To really find out what the differentiating features of brands are, we need to compare all brands in the market irrespective of their size.



If you look at the rabbits on the right, you'd probably notice that rabbit B is a rabbit with big ears. But if you look more closely, Rabbit A and Rabbit B have the same size ears. But, relative to the size of the rabbit, the ears on Rabbit B are much bigger.

We could therefore use this as a distinguishing feature, or characteristic, to describe it.

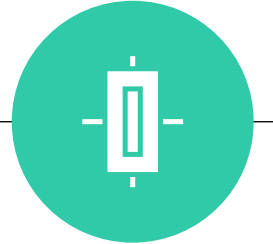
The ears are much bigger on Rabbit B relative to its size.



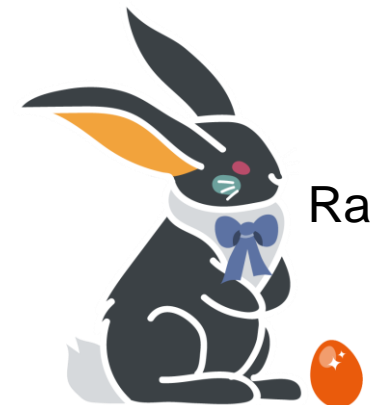
Similarly, we want to be able to **identify the differentiating features each brand has RELATIVE to its size.**



Rabbit A



A value of (+ / - 5%) is considered a relative strength / weakness.



Rabbit B

**Details:** A two-step normalization within brand **and** across brands is performed. So that the effect of brand size is removed and therefore smaller brands appear relatively stronger than they would otherwise. This analysis should **always** be interpreted alongside the not normalized brand profiles to avoid misinterpretation.

# Shapley value analysis explained (aka Drivers' analysis)

## What it is:

- Shapley Value Analysis comes from the field of Game Theory. It is a method to assign a value, or worth, to each potential member of a team so that you can construct the strongest possible team.

## How Shapley Value is determined:

- To find the Shapley Value of an item in a line of products or services, we compare the performance of all possible lines that contain the item with all possible product/service lines that do not. We define the performance of a line as the total unduplicated definite purchase interest in the line or, in other words, as the number of consumers who definitely will buy at least one of the items in the line. The Shapley Values of the items are scaled so that they sum to the total number of people who would buy based on at least one of any of the items that we tested.

## How to interpret A Shapley Value:

- The Shapley Value is a measure of the relative strength of individual items. There are two aspects of that strength:
  - 1) an item must appeal to a relatively large number of consumers, and
  - 2) some of those consumers must have a unique attraction to the item.
- In other words, many consumers must intend to buy because of the scent, and a subset of those consumers must intend to buy only because of that scent (or only a small subset of scents including that scent). If a scent appeals to a relatively small number of consumers, then its Shapley Value will be small because many lines that don't include the scent will have higher purchase interest intent. On the other hand, if two items reach exactly the same people, they will have the same Shapley Value so their relative strength will be equal.
- An individual Shapley Value can be interpreted as the incremental number of individual consumers that will purchase something due to having that item, or in this case that scent in your line. Shapley Values are not additive—they are a measure of the relative importance of having each individual scent in your final product line.





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# For more in-depth insights, don't hesitate to get in touch!

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