



YouGov®

ROMANIA

# Dancing to the Promo Beat

Case studies on brand health impact  
and incremental effects

**Aura Matei**

Senior Research Consultant | Advanced Solutions Team

Consumer Panel Romania GfK

The CPS GfK trademark is used by YouGov under license from GfK. A YouGov trademark will replace the CPS GfK trademark. GfK and its affiliates do not own and are not affiliated with any YouGov trademark



# Reasonable expectations... or not?



**drive trial or penetration**

**bring about repeat & loyalty**

**grow mental availability**

**boost sales**

**increase consumption**

# Decomposing the music of promo into parts

**Effect on brand: investment vs competitive relevance**

**Incremental effects: switching & subsidizing**

**Promo Evaluator**



**agenda**

**Net Promotion Impact**



# On the dance floor... sparkling soft drinks

**Penetration**  
**91.8%**

-0.8% vs PY

**Volume  
change**  
**-2.2%**

**Inflation**  
**19.9%**

vs 9.2% in  
Total FMCG

**Promo vol**  
**25.1%** ↗

vs 20.6 in  
Total FMCG

**Frequency**  
**26.1** ↘

**Vol / buyer**  
**-2% vs '22**  
**-9.3% vs '21**

# The Performers

**Top performer in its  
SSD segment  
4<sup>th</sup> brand by Consumer  
Reach Point in  
beverages**

**Still losing volumes  
more than the category**

**Promo vol  
17.9%  
+2.4% vs PY**



**The promo champion  
In the category,  
but... with important  
volume drops**

**2<sup>nd</sup> most important SSD  
in its producer portfolio**

**Promo vol  
39.1%  
+0.8% vs PY**



# The Performers



# Shoppers playing **exclusively promo** tunes

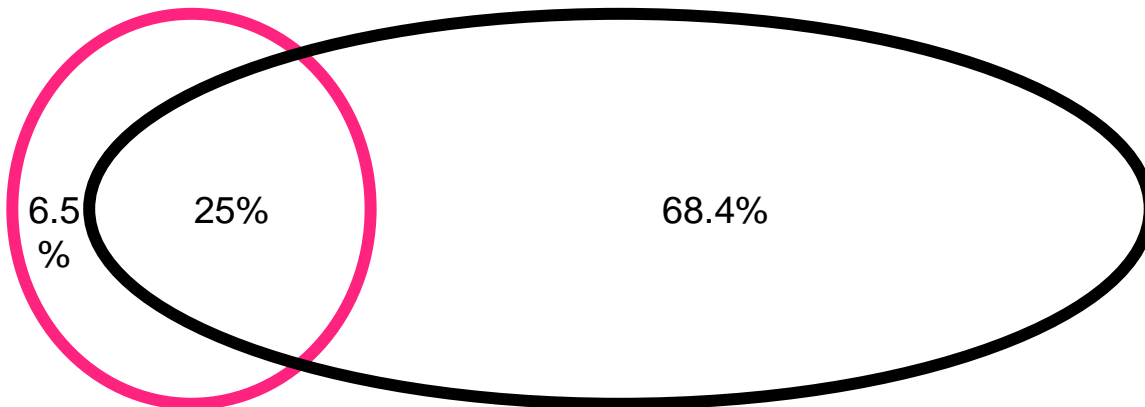


**Promotion & Regular Price**  
**100% Brand Buyers**



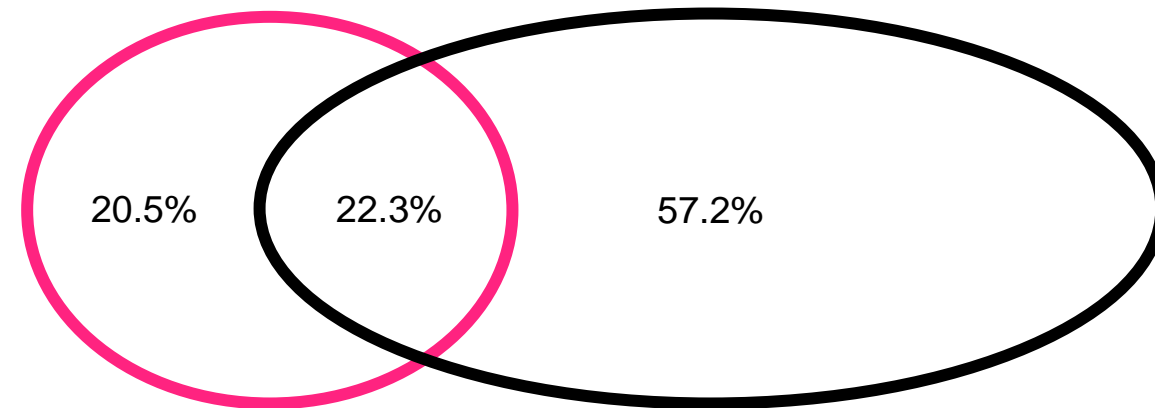
**Promotion**

**Regular Price**



**Promotion**

**Regular Price**



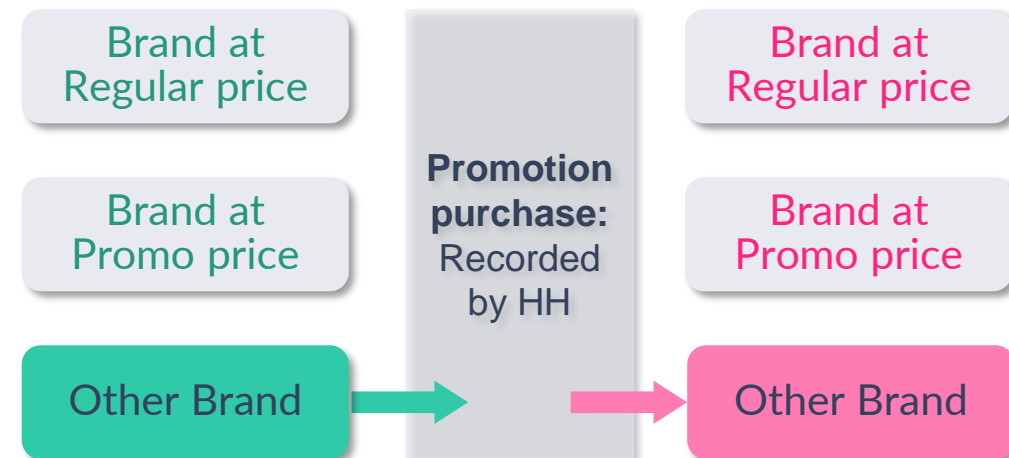
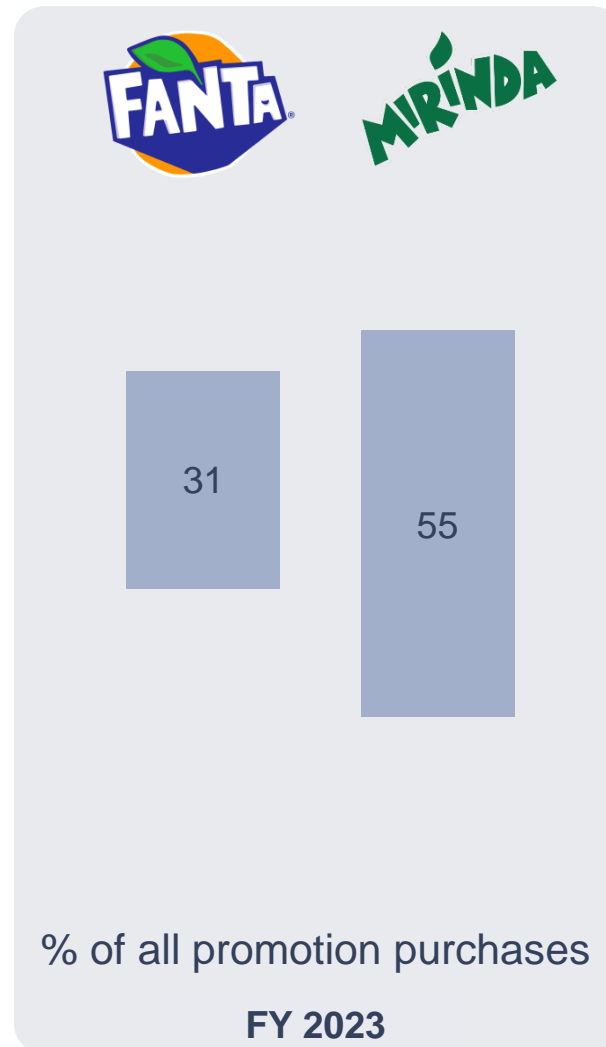
# 1 Promo Evaluator





# Speed dancing: temporary sales boost, short-lived sourcing

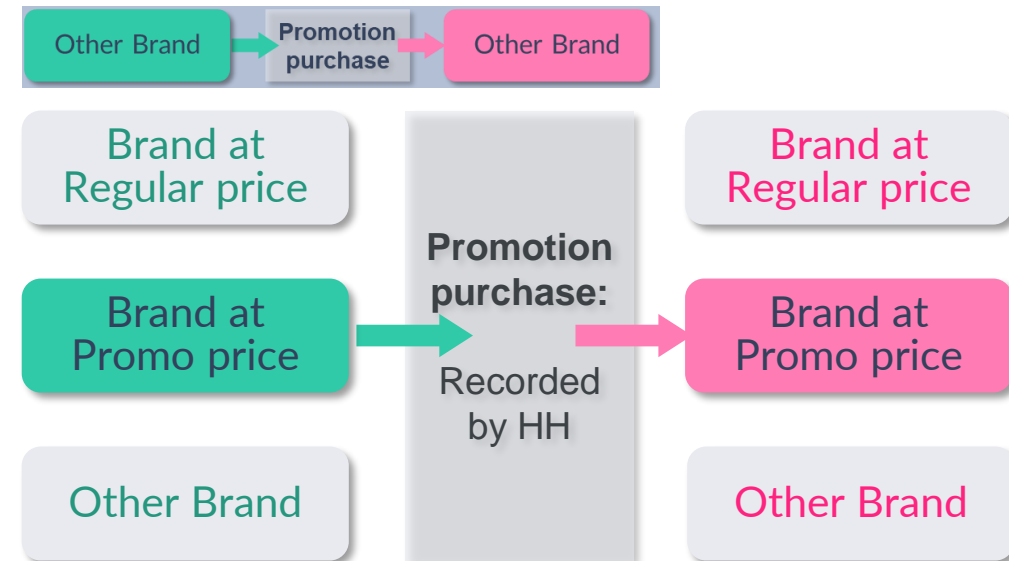
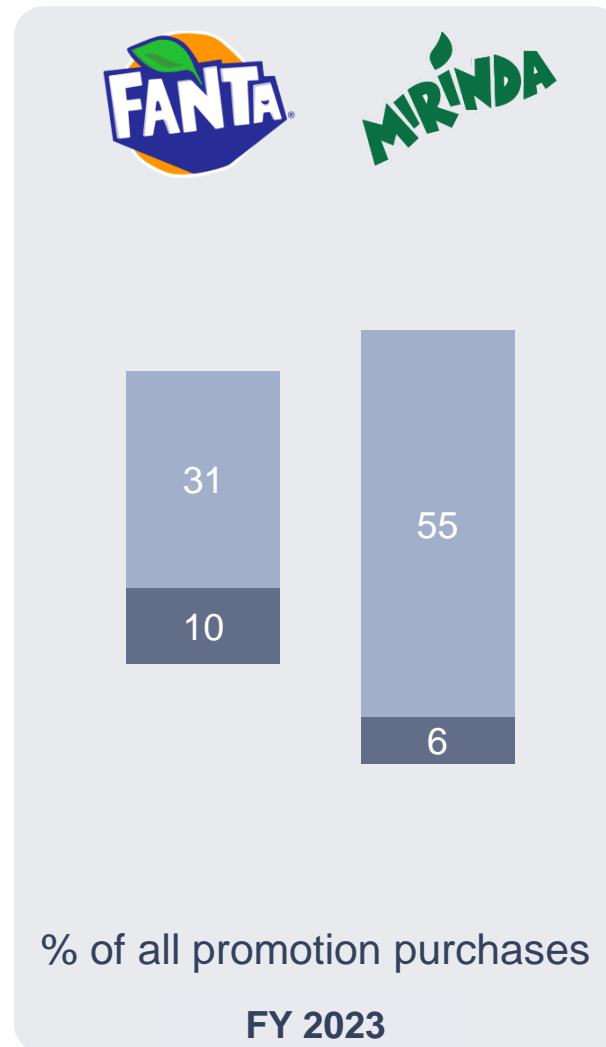
**Fast Euro**



# Secure your opportunistic admirers

**Fast Euro**

**Defended Market Share**

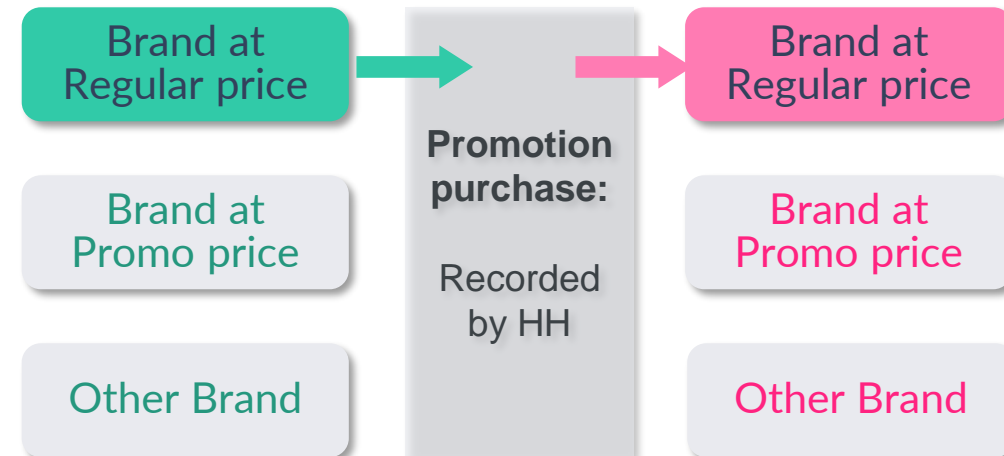
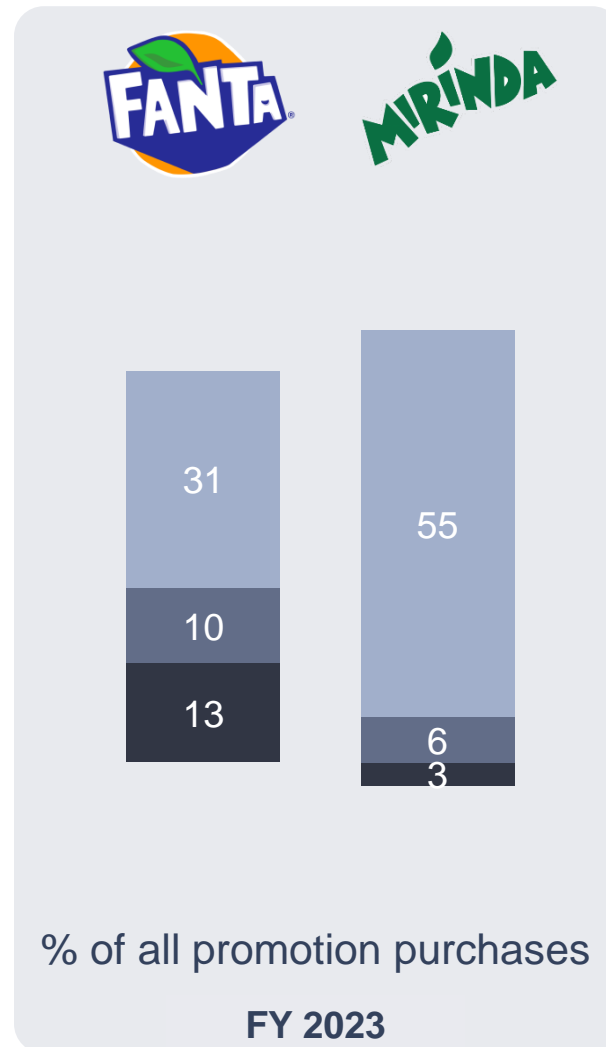


# Rewarding loyalty... or wasting of money?

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**





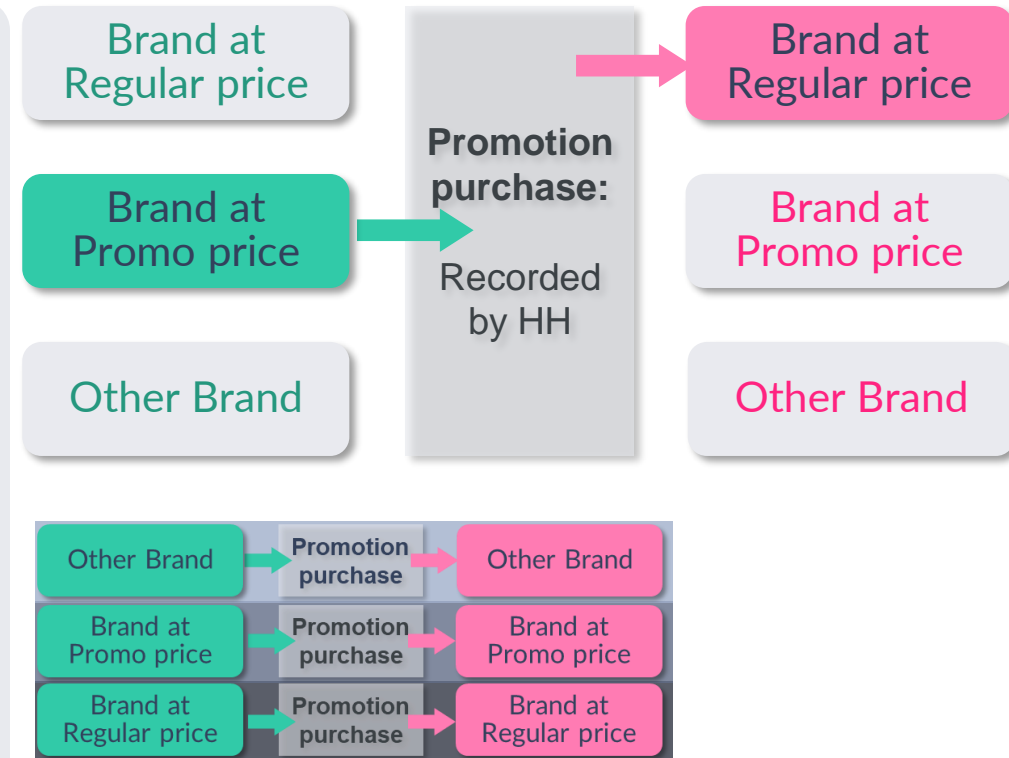
# Upgrading your fan base

**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**



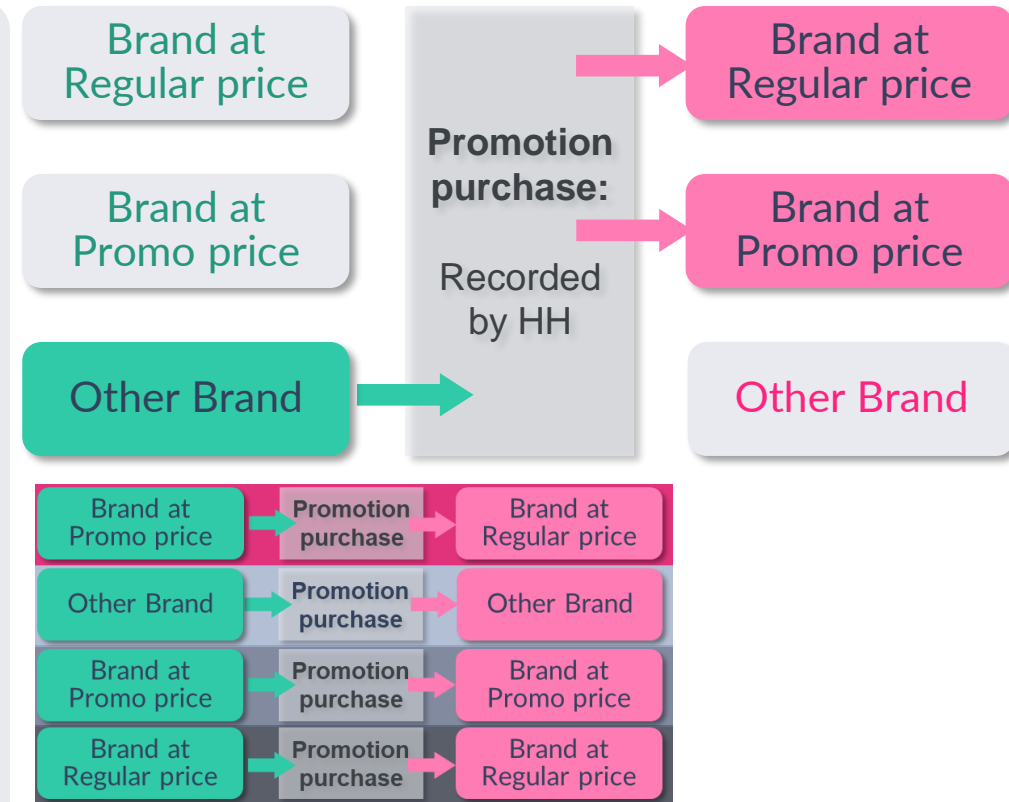
# New admirers to your corner

**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**



# The estranged...

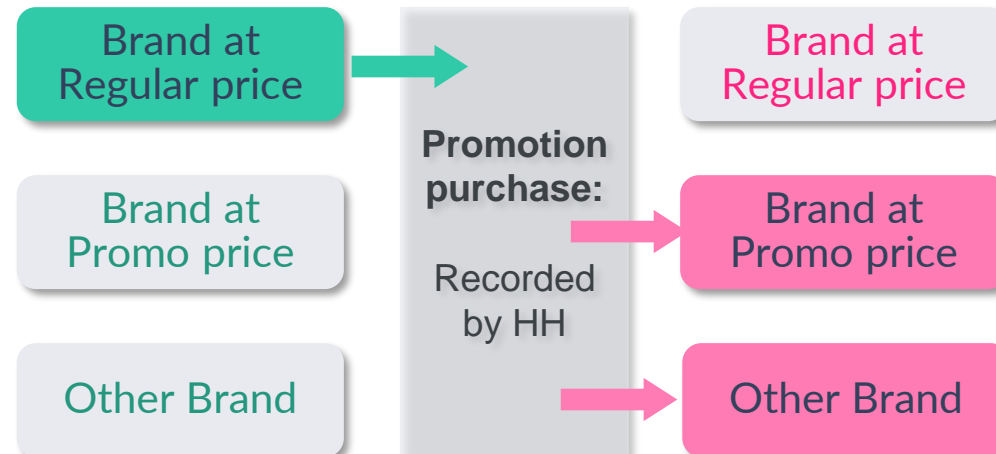
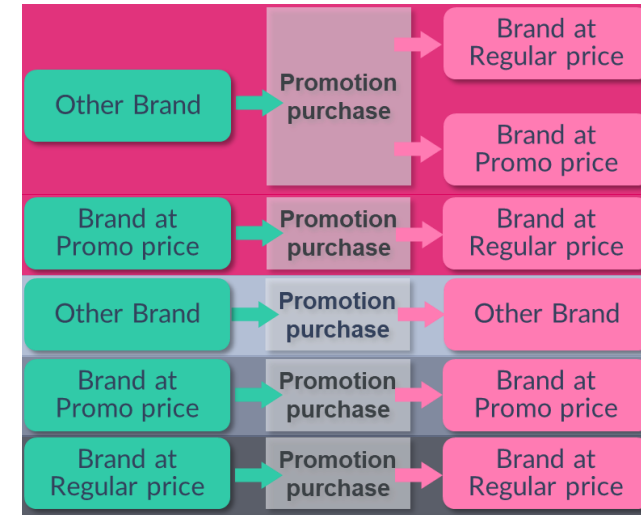
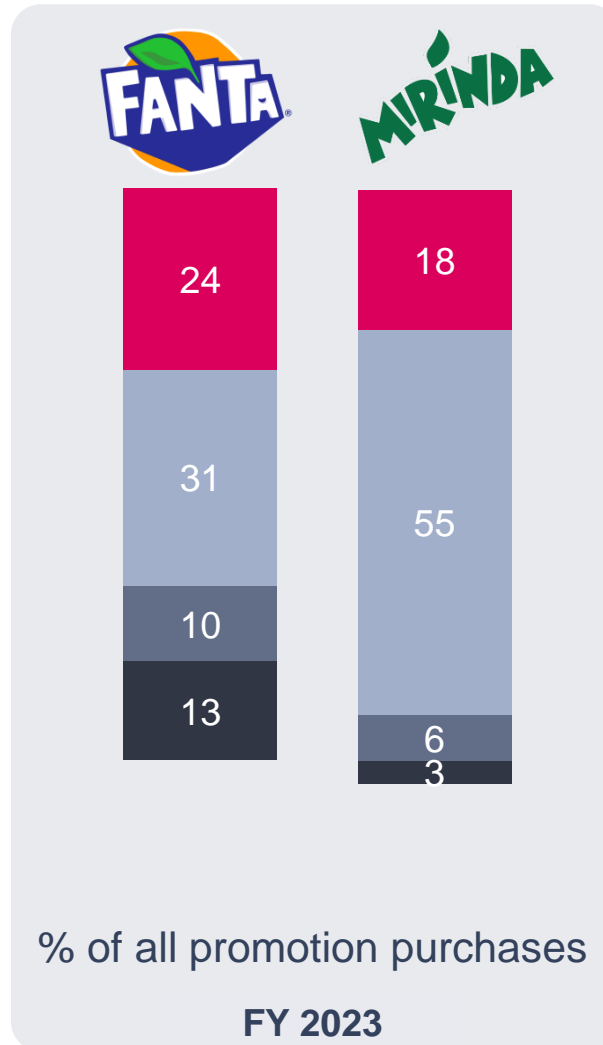
**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**

**Brand Erosion**





# The definitely lost

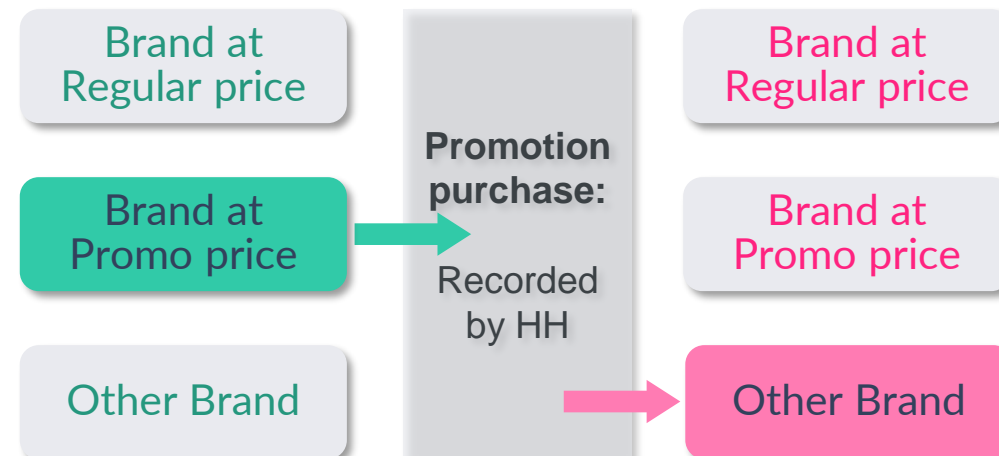
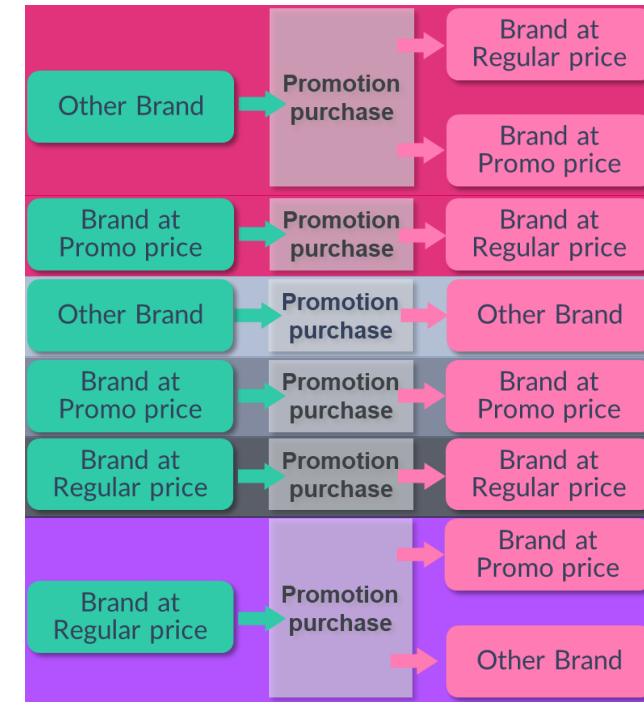
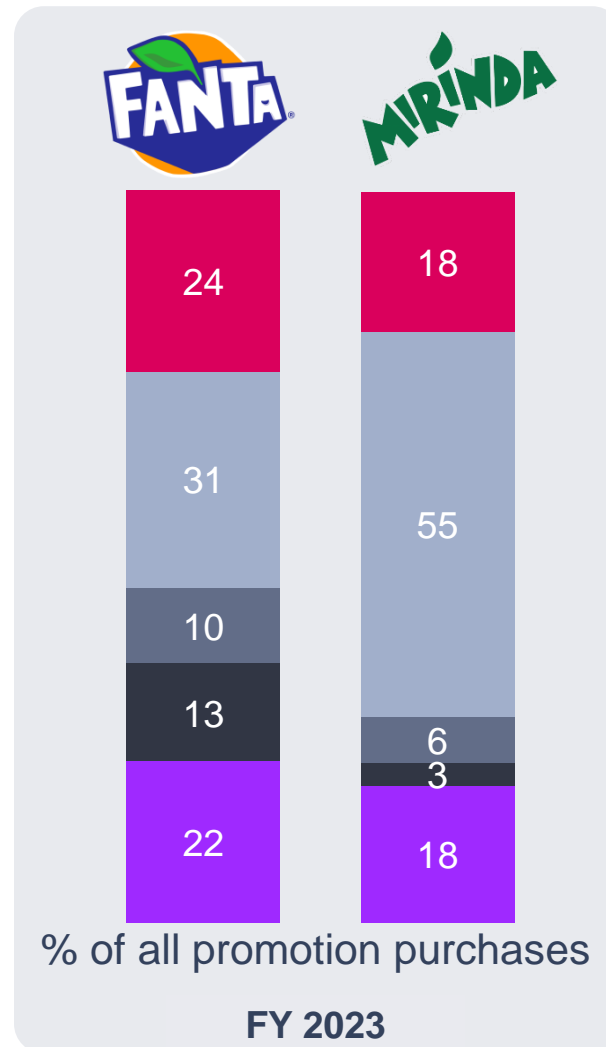
**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**

**Brand Erosion**



# All possible combinations in a 3-trip purchase chain

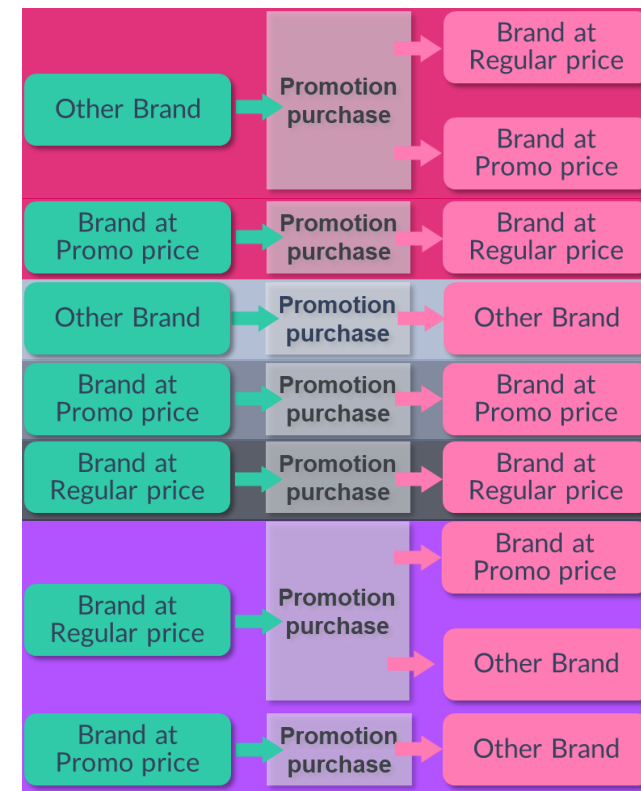
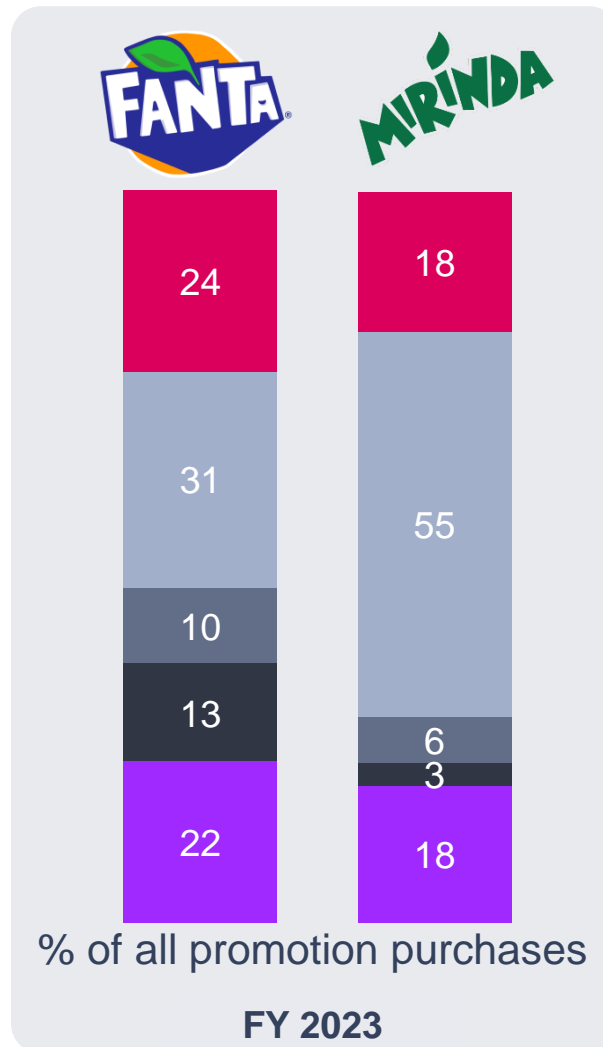
**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**

**Brand Erosion**



# Always dance with me or, the least, less with them

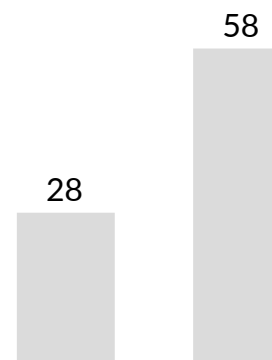
**Brand Investment**

**Fast Euro**

**Defended Market Share**

**Loyalty Bonus**

**Brand Erosion**



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

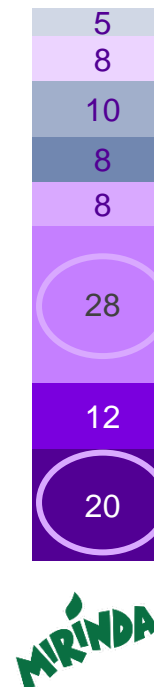
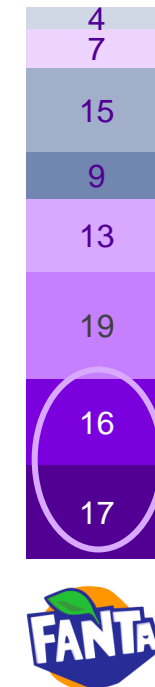
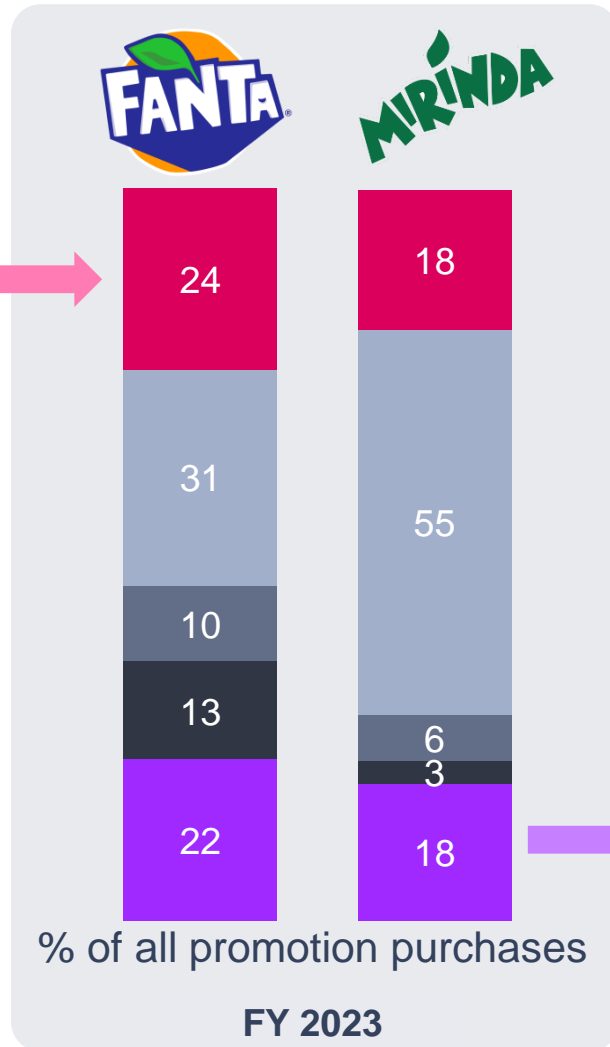
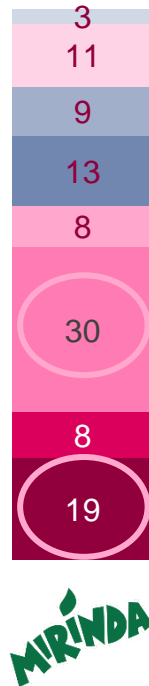
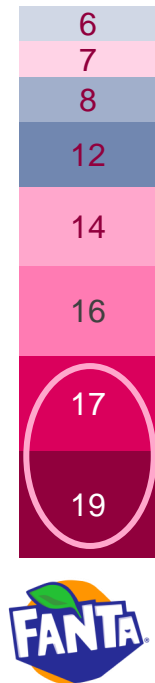


**Market Value:**  
 = Brand Investment  
 - Brand Erosion



# Gaining fans from... for the loses to...

- Giusto TM
- Sprite TM
- Other brands
- PL Limonade
- Frutti Fresh TM
- Fanta TM
- Mirinda TM
- Schweppes TM



Brand Investment

Fast Euro

Defended Market Share

Loyalty Bonus

Brand Erosion

■ Giusto TM

■ Sprite TM

■ Other brands

■ PL Limonade

■ Frutti Fresh TM

■ Fanta TM

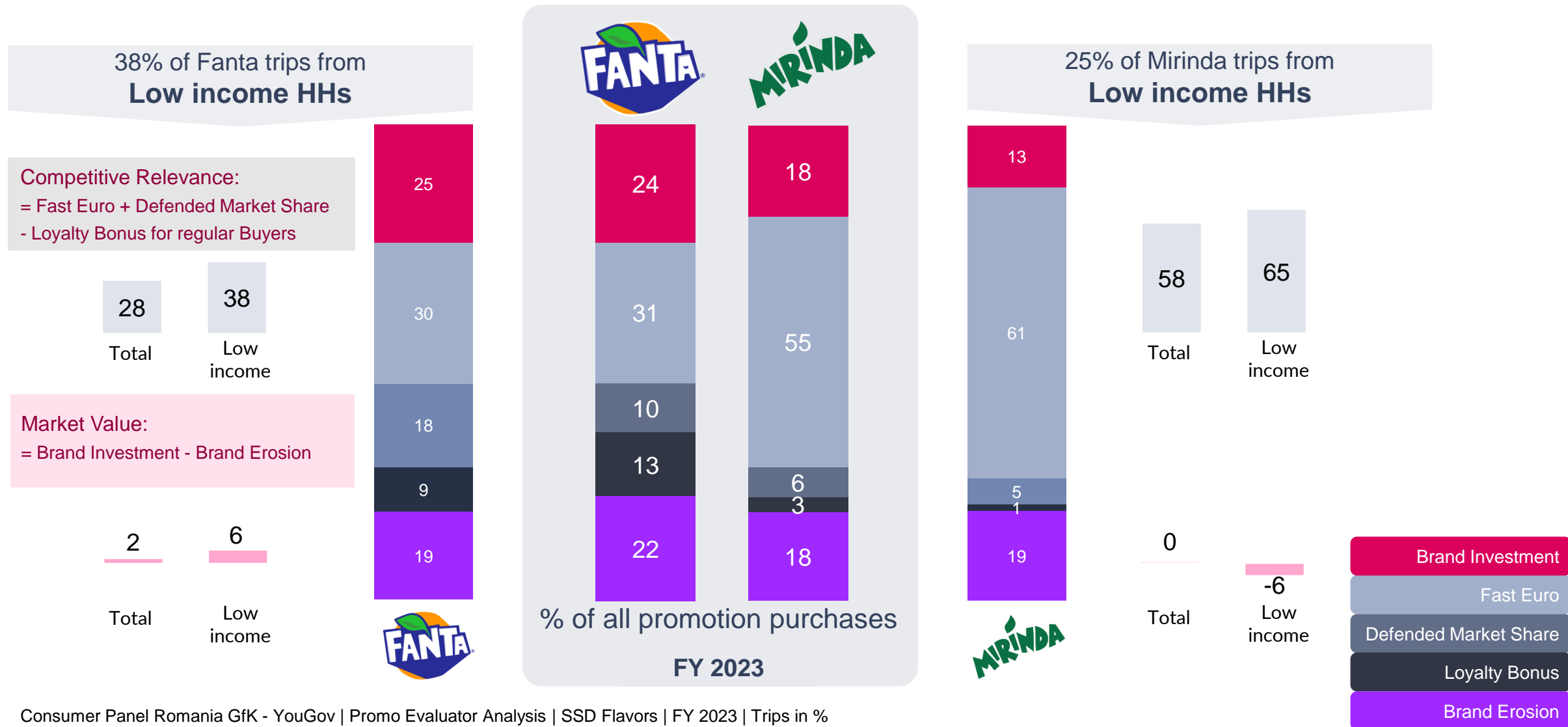
■ Mirinda TM

■ Schweppes TM

# Gaining fans from... for the loses to...



# The different types of crowds





# New glasses to look at your promo



**Brand Building**

**Sourcing &  
Targeting**

**Competitive  
Relevance**

# 2 Net Promotion Impact



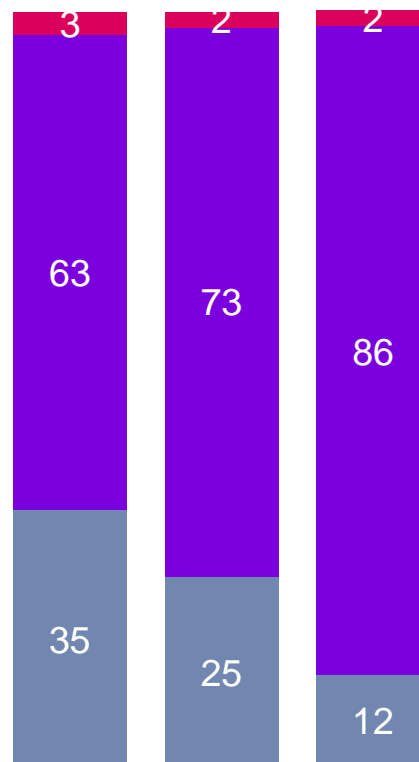
# Promo Volume decomposed in...

**Category Expansion**

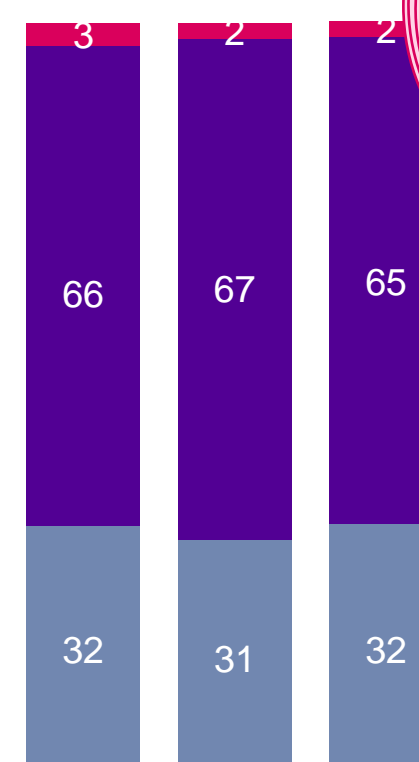
**Brand / Store Switch**

**Brand / Store Subsidized**

Manufacturer Perspective



Retailer Perspective



**9%**  
highest  
category expansion  
achieved by



% of promo volume

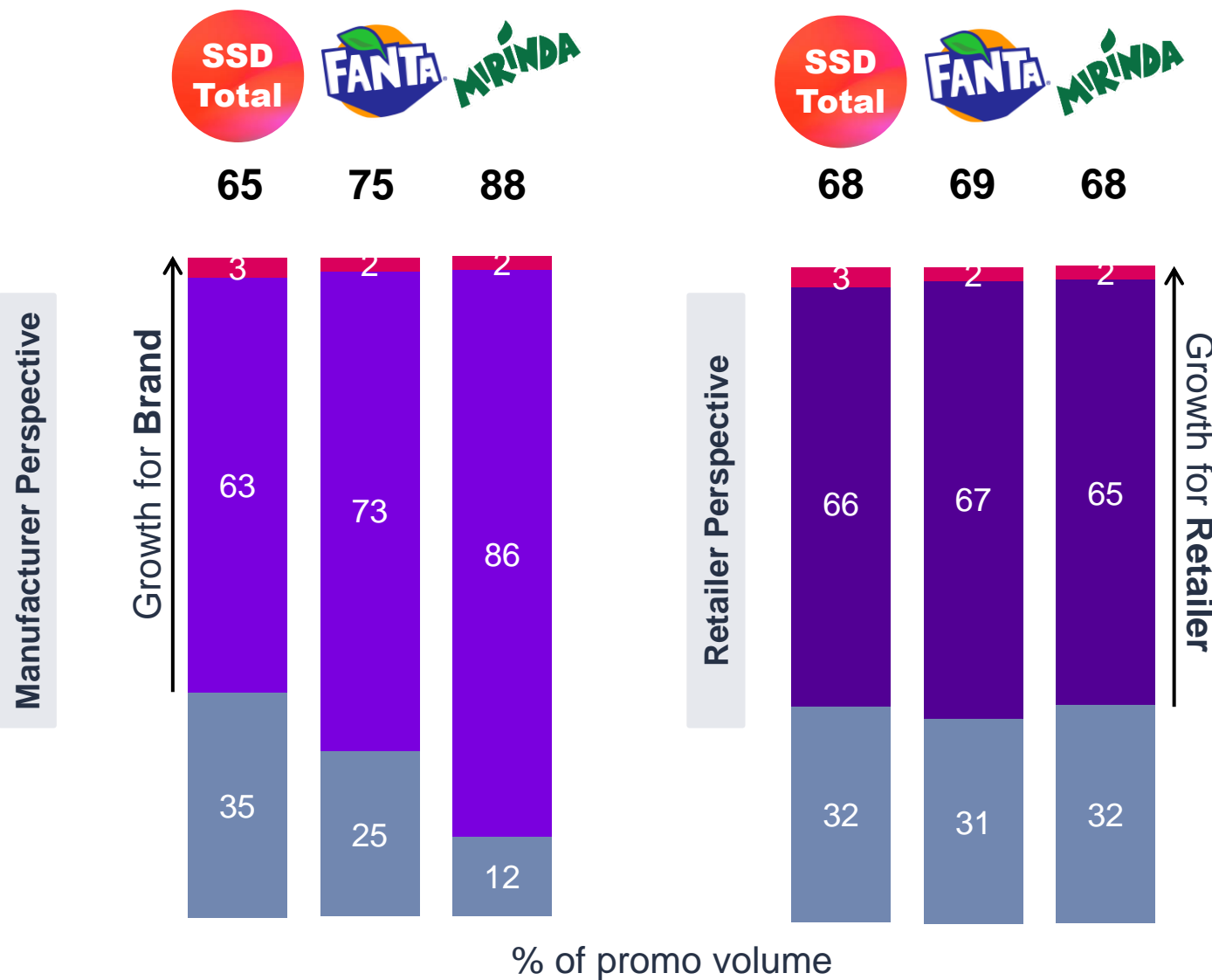
# Promo Volume decomposed in...

Ø Net Promotion Impact

Category Expansion

Brand / Store Switch

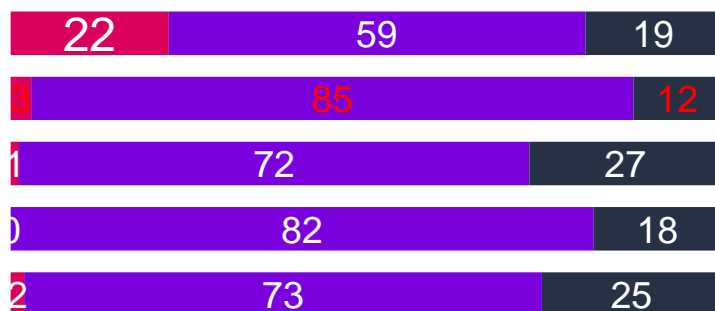
Brand / Store Subsidized



# The pack-types worth the bets are...



Manufacturer  
Perspective



Ø NPI

81

Single Serve Single-Pack

88

Single Serve Multi-Pack

73

Multi Serve Single-Pack

82

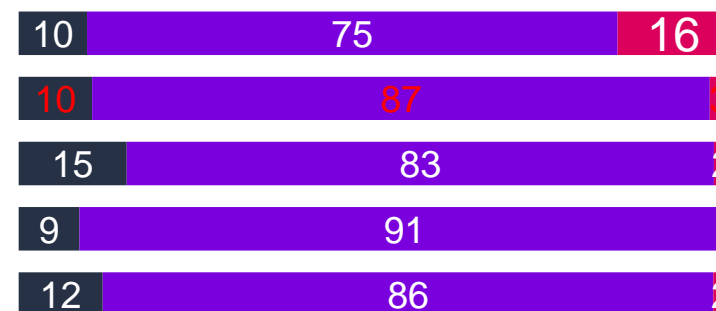
Multi Serve Multi-Pack

75

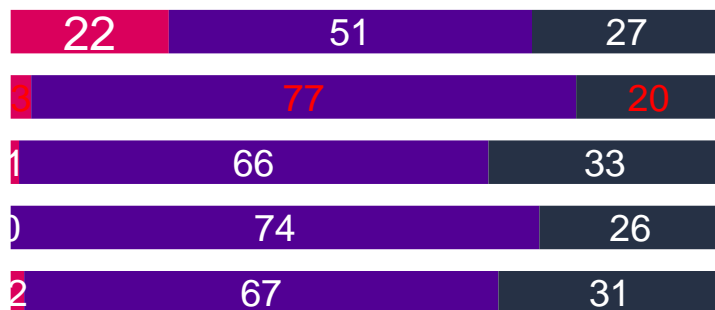
Total Brand

Ø NPI

90



Retailer  
Perspective



73

Single Serve Single-Pack

80

Single Serve Multi-Pack

67

Multi Serve Single-Pack

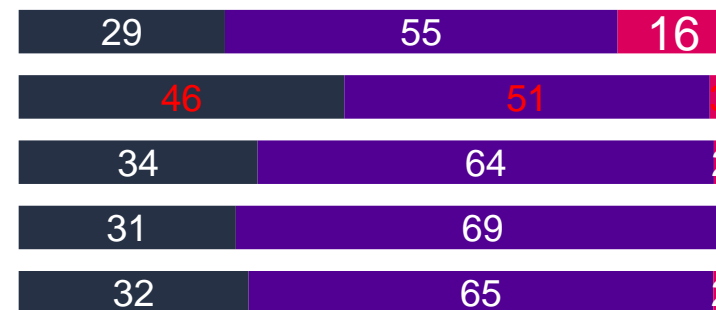
74

Multi Serve Multi-Pack

69

Total Brand

71



Category Expansion

Brand / Store Switch

Store Subsidized



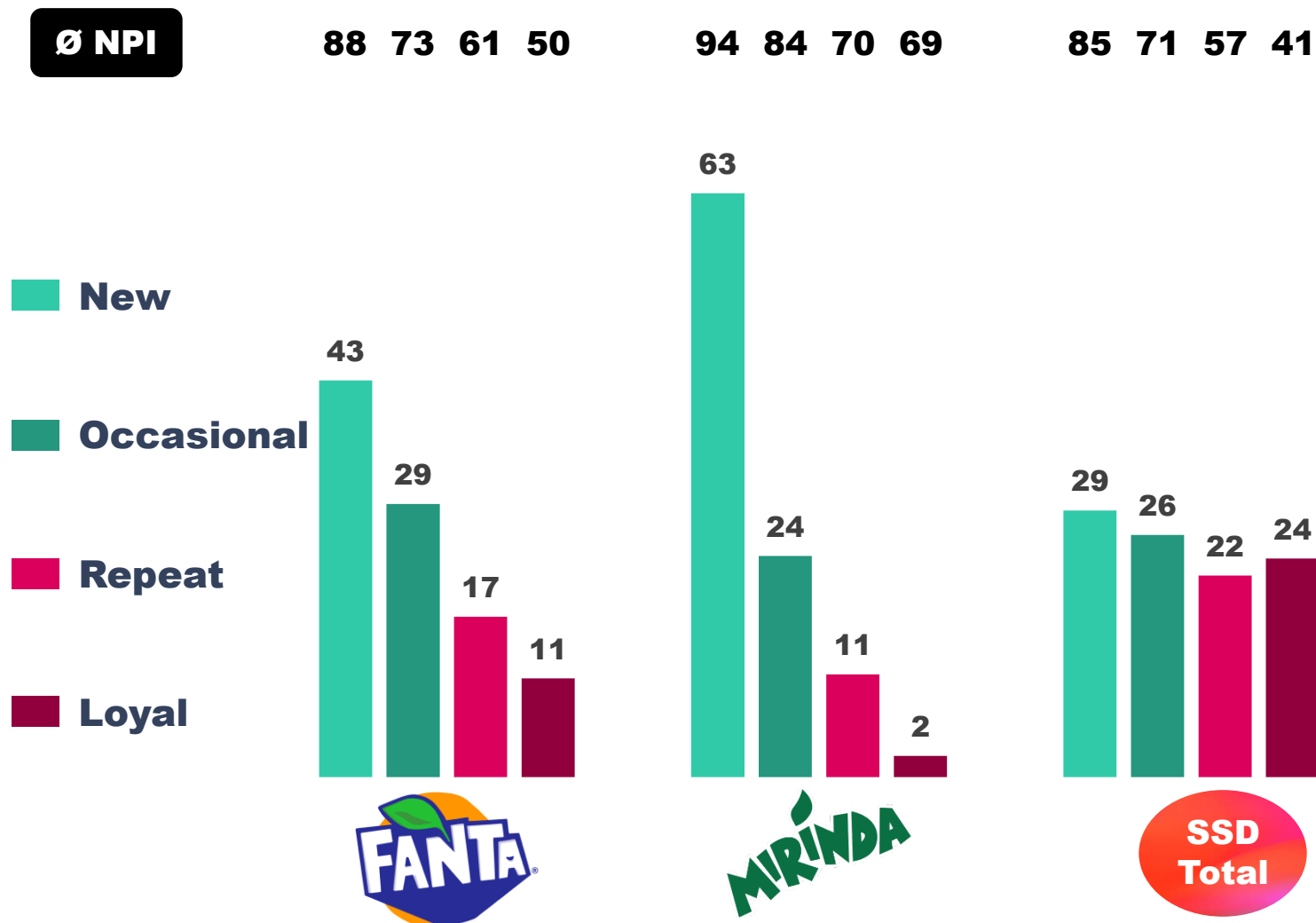
# Bringing shoppers back

Focus Brand  
not bought in last 3 trips

Focus Brands  
bought in 1 of the last 3 trips

Focus Brands  
bought in 2 of the last 3 trips

Focus Brands  
bought in 3 of the last 3 trips



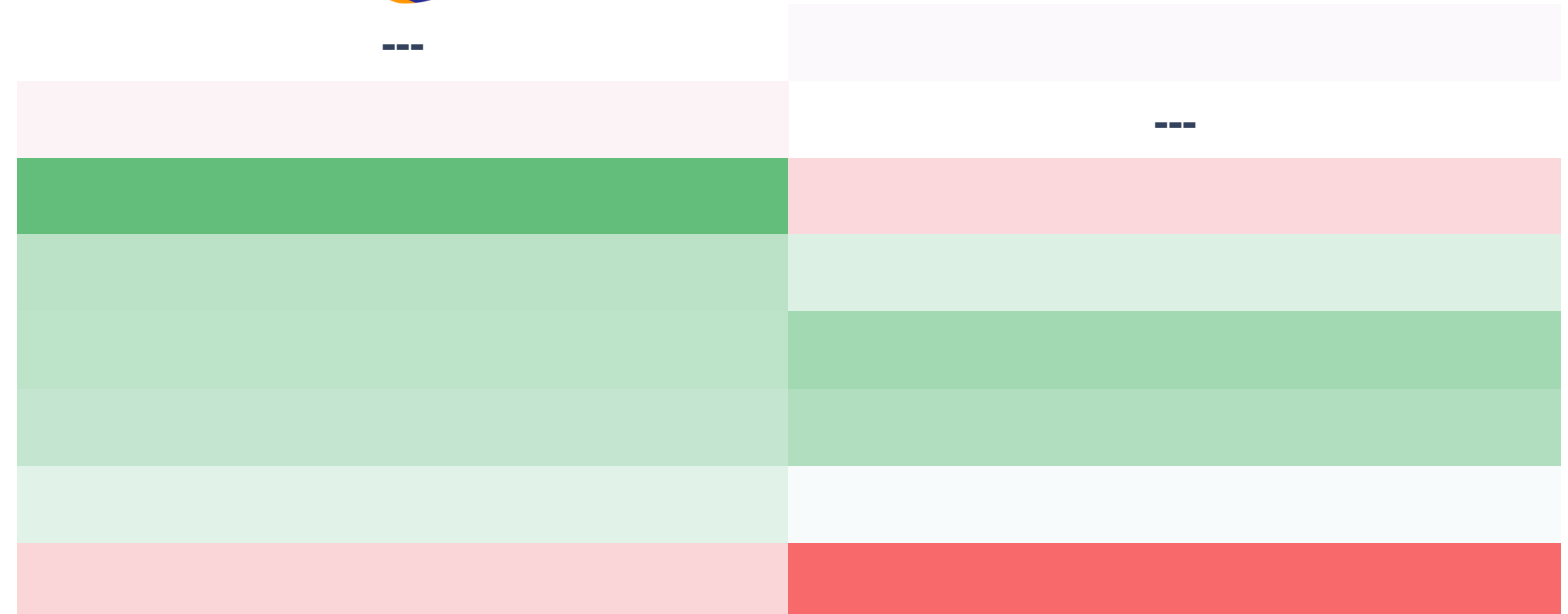
# Is it sourcing, is it cannibalization?

**When Brand... is in promotion, it sources...**



... from these brands

**Fanta TM**  
**Mirinda TM**  
**Coca-Cola TM**  
**Sprite TM**  
**Pepsi TM**  
**PL Limonade**  
**Frutti Fresh TM**  
**Schweppes TM**








Over-indexed compared to Total

Under-indexed compared to Total

# The retail dance floor in the category

When SSD are in promotion at..., the store sources...

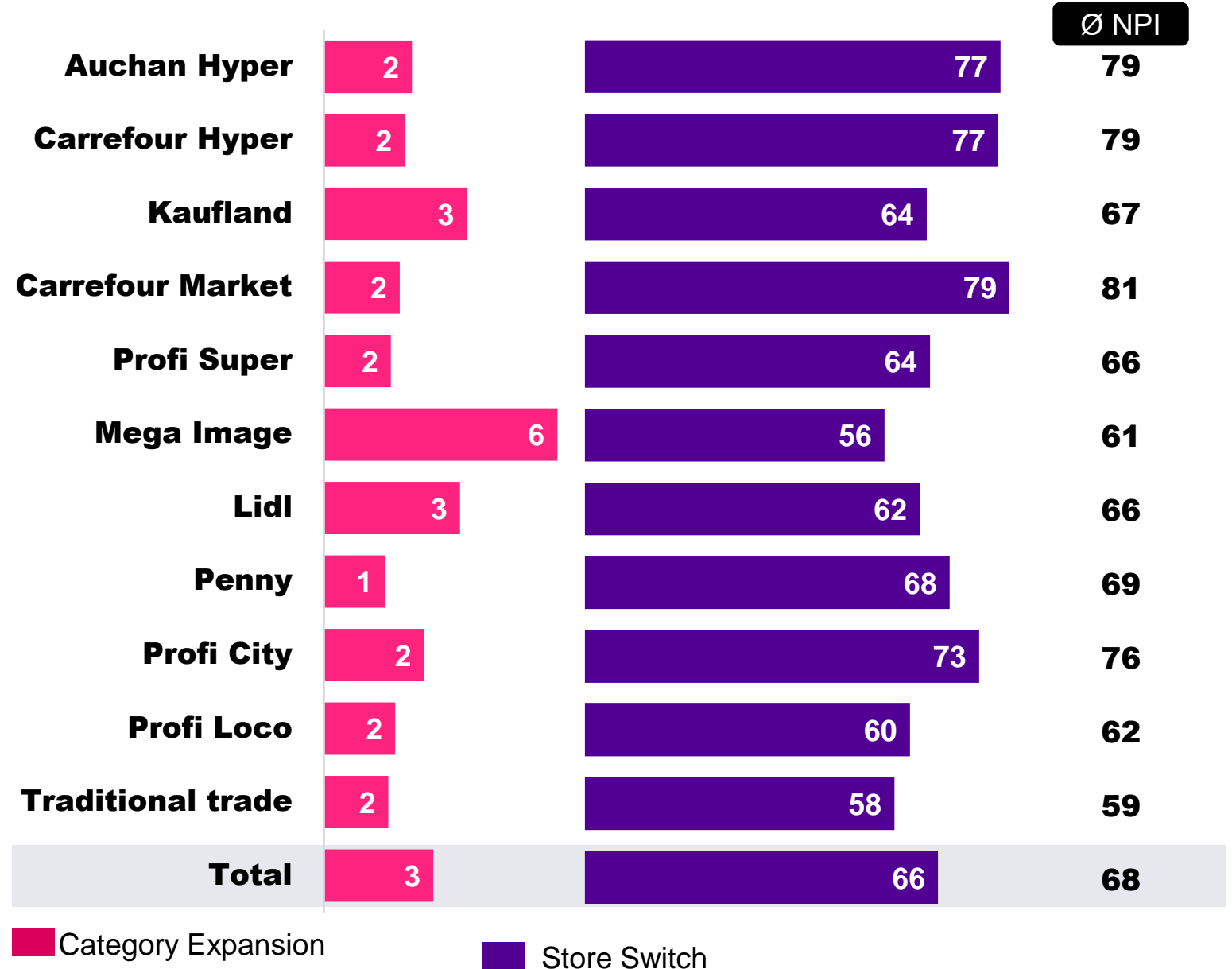
... from these retailers

					
<b>Auchan Hyper</b>					
<b>Carrefour Hyper</b>	---				
<b>Kaufland</b>		---			
<b>Lidl</b>			---		
<b>Penny</b>				---	
<b>Carrefour Market</b>					
<b>Mega Image</b>				*	---
<b>Profi Supermarket</b>					
<b>Traditional trade</b>					

Over-indexed compared to Total

Under-indexed compared to Total

# Impactful retail performers



# Most attractive scenes for manufacturers



profiCITY



profiSUPER



PEPSICO

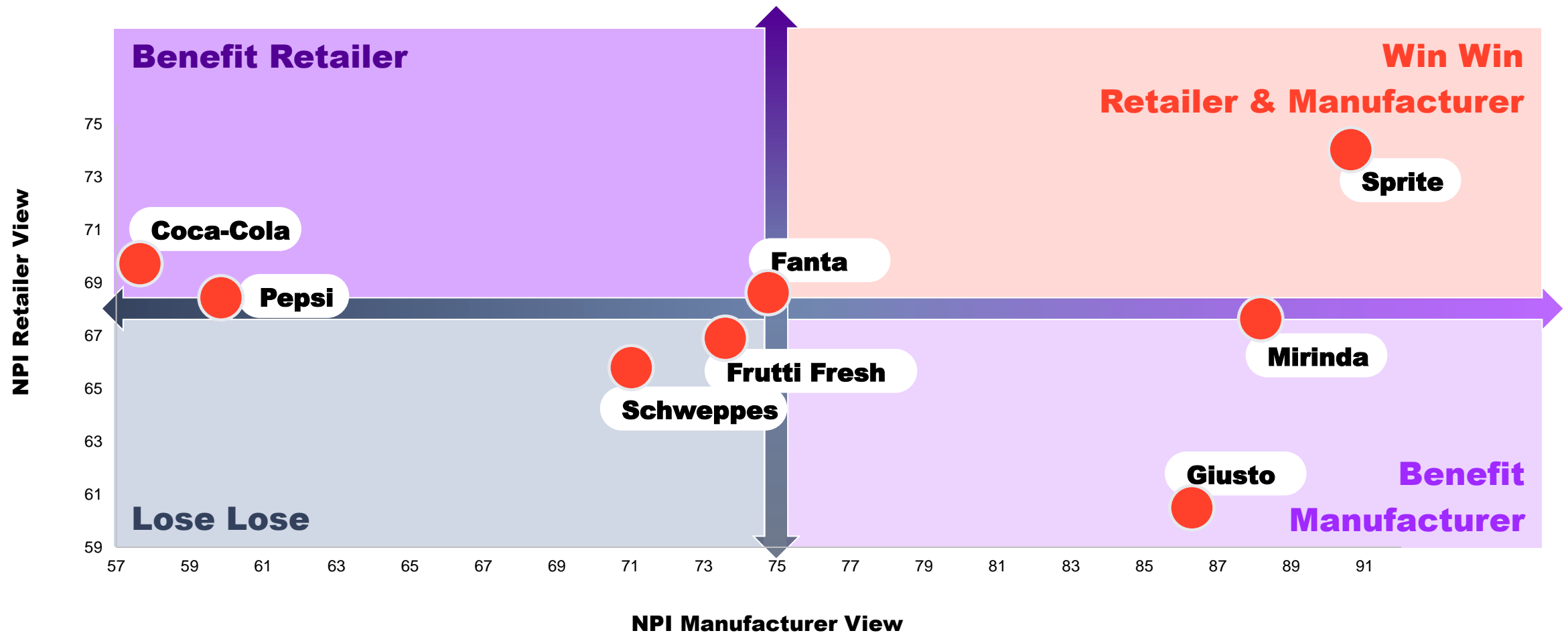


profiLOCO





# Synchronizing dance moves



# Assess your promo impact by



**Intensification**

**Retail partner**

**Repeat / Loyalty  
& Subsidy**

**Sourcing**

# Own the Promo Dance Floor

- Good bank of knowledge & learnings
- Assess promo results
- Informed creativity: synergies, testing
- The right partners for each objective

**Get the price right:**  
**Pricing is priceless!**



# **Our Promo to you!**

## **10% to all PEV & NPI Analyses commissioned in 2024**

## **Syndicated NPI Approach for Retail Partners**

# Thank you!

---

## Aura Matei

Senior Research Consultant

Aura.Matei@gfk-cps.com

+40 (0)745 62 44 47

Advanced Solutions Team

Consumer Panel Services GfK | YouGov | Romania

