

Proměny spotřebitele v době krize

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Co dělat v krizi a po ní?

Zhruba 50, často protikladných studií

- Spotřebitel bude racionálnější
 - Žádné místo pro značky uprostřed
 - Trade bude žádat affordability, ne budování značky
 - Soustředěte se na komunikaci, v krizi se dá hodně získat
 - Zaútočte na nejslabšího konkurenta
 - Trend „Eat at home“
- 

Praktické otázky

Klesly trhy?

Došlo k downtradingu?

Využívá spotřebitel více cenových akcí?

Jsou značky cenově citlivější?

Co pro značky v krizi fungovalo?



Klesly trhy?



Blend of 10 traditional FMCG categories

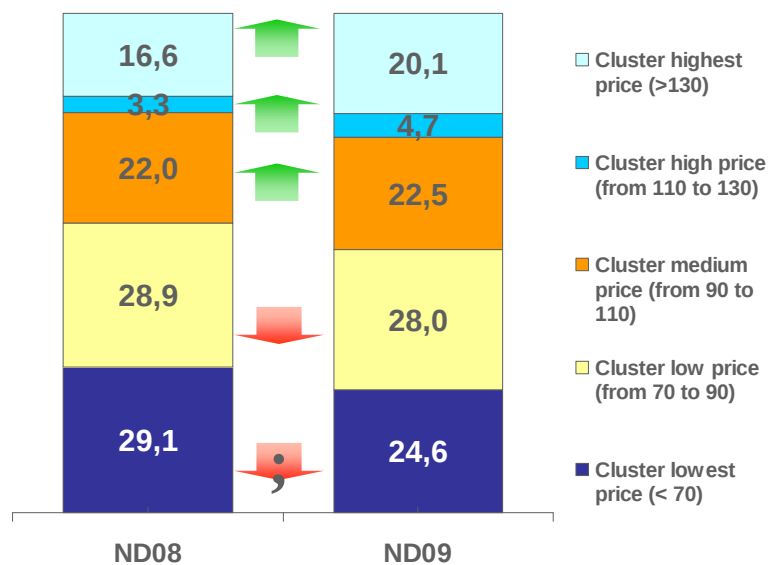
	Volume	Value
12 month of crises vs. Before*	Up	Down

* H2 09/H 10 vs. H1 09/H2 08



Došlo k downtradingu?

Price Piano Category A, Czechia
(SKU based – except for 'PLs' that are segment based)



Nedošlo

U stands for Uptrading

M for Midtrading, premium and economy segment shrinking on account of middle priced

D for Downtrading



Cenové akce?

Počet akcí se zvýšil

Došlo k nárustu hloubky promocí zhruba

Prodeje na akci ale zůstali prakticky stejné





Byla tu opravdu krize?

Nebo spíš pseudokrize?

Spotřebitelé kupují stále stejné množství,
nevyhledávají levnější výrobky, pouze využívají
většího množství akcí, které jsme jim aktivně
nabídli

Nezkazili jsme si trh sami?





Jižní Afrika

South Africa Savoury: Our brands



Marketing Mix Models

Media: TV, Print,
Radio, Outdoor

Competition's
Price & Advertising

Distribution

Know how these levers independently influence sales
and get deep understanding of the brand.

Category
growth

Price

Where should one focus the energies and spends on ?
What do we need to do in these areas ?

Seasons/
Events

Consumer
Promotion

Trade
Spends

MMM gives CLEAR & ACTIONABLE recommendations on these areas



Consolidating Findings; 2008 versus 2010

Price elasticity of premium brands increased, price elasticity of economy brands decreased. That enables gains through price optimization.

Promotions started to work much better cross brands. Advertising effectiveness went down cross brands.





Rusko



Russia, Total Market Trends 2009 vs 2008

**Naprostá většina
kategorií poklesla v
objemu o 5-10%**

When do we come back?

What to do to come back?



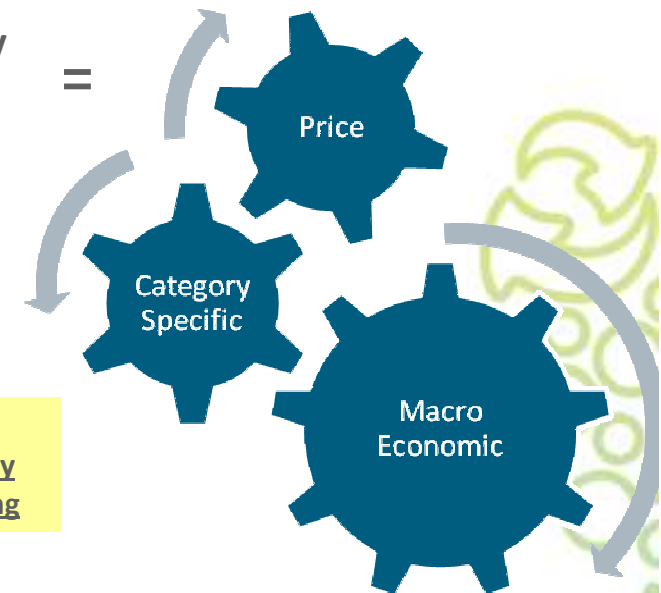
Category / Market Forecasting

Category growth forecasts are often generated in business very subjectively. They are not based enough on past experience and not on extrapolating external factors

Therefore we developed and used extensively a method that:

- Is based on robust statistical model with tests for accuracy, bias and techniques for minimizing forecast errors.
- Allows incorporation of causal events, e.g. an economic downturn.

Total Category Volume =



Category specific variables which impact category growth like advertising

Macroeconomic variables which impact category growth can be classified in two groups.

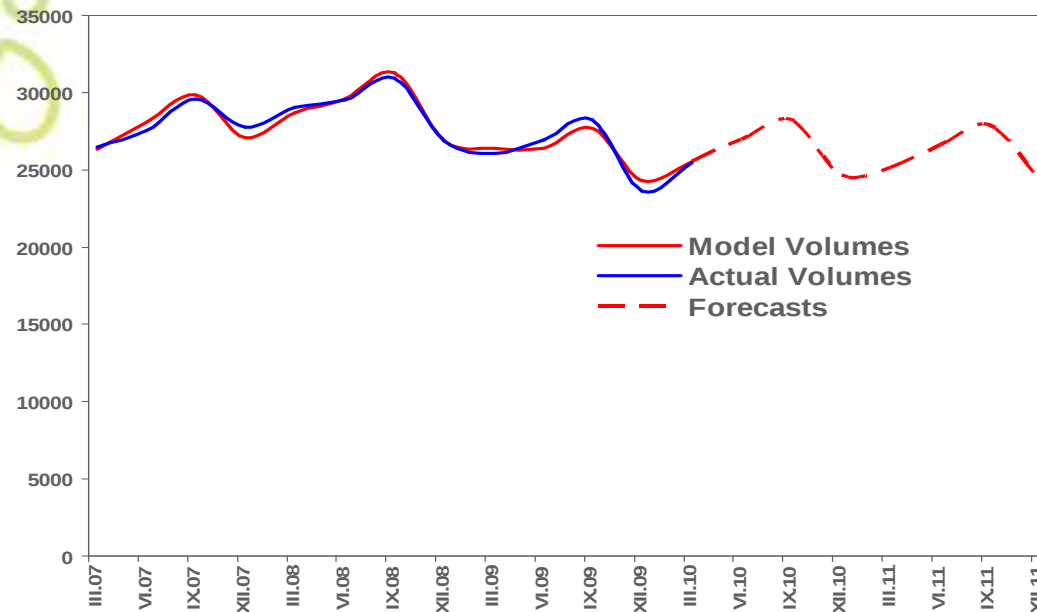
1. Liquidity variables

These variables represent household disposable income or “cash in hand”

2. Structural variables

These macroeconomic variables represents structural growth in the economy. e.g. Employment and GDP

Russia Category A, Volume Forecast



YTD	2010 Model Forecast Range	2011 Model Forecast Range
Forecasts	0 to -2%	0 to 2%

- Any GDP decline of 1% brought 0,8% decline to the category.
- Price decreases of the category had very limited effect on the category growth.
- Media support does have influence, 5% growth in media is bringing 0,5% category growth.
Do not cut!
- Full recovery is expected in 2012/2013, depending on the total media support.