

## **DETAILED AGENDA**

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- 2. BUSINESS OPPORTUNITY

#### **3. OCCASION DEEP DIVE**

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- Why?
- How?
- Where?
- Occasion summary

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- OBPPC
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- In-store activation
- Cross-category placement

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- KVs

#### 6. PRE-SHOP

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# INTRODUCTION

This toolkit outlines a clear shopper strategy of how to build the second at home occasion, ME TIME AT HOME, with a strong portfolio approach. It clearly defines a role of each brand in addressing different shopper segments with different needs and habits within the ME TIME AT HOME occasion.

Our goal is to drive revenues and transactions by establishing a habit of single serve consumption at home as a perfect companion to the me time. Through cross-category placement and by creating additional interruption points throughout the store we aim to capture ME TIME AT HOME occasion in modern trade.

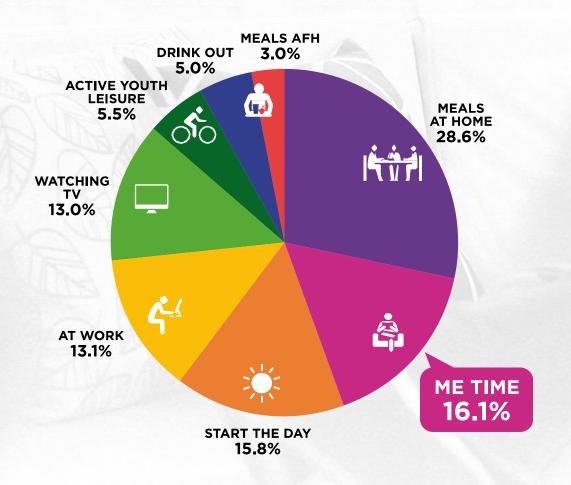


## **BUSINESS OPPORTUNITY**

## DRIVING TRANSACTIONS AND REVENUE BY DEVELOPING A SECOND AT HOME OCCASION – ME TIME AT HOME

Drive<br/>revenueBY ACTIVELY BUILDING A 2ND AT HOME OCCASIONDrive<br/>frequencyBY ESTABLISHING A HABIT OF SINGLE SERVE AT HOME CONSUMPTIONIncrease<br/>PenetrationBY REACHING ADDITIONAL HOUSEHOLDS

## ME TIME AT HOME OCCASION IS THE SECOND BIGGEST OCCASION IN VOLUME IN CEE



WATCHING TV@HOME ALONE

> 729 MM UC

ME TIME ALONE 1244 MM UC 2 BL UC OCCASION

Source: CBL and Category Vision, total CSE, me time volume split.

Source: CBL Total Population., CEE

## IT REPRESENTS A BIG OPPORTUNITY TO CAPTURE INCREMENTAL VALUE AND DRIVE TRANSACTIONS

BY ENCOURAGING SWITCHING FROM NON-COMMERCIAL (TAP WATER) AND LOWER VALUE BEVERAGES (PACKAGED WATER) TO HIGHER VALUE COMMERCIAL BEVERAGES WITH HIGHER MARGINS (SPARKLING, ICE TEA)

Strong habit of drinking tap water and packaged water in at home leisure time











BY MOVING FROM MULTISERVE TO A SINGLE SERVE MULTIPACK APPROACH AND ESTABLISHING A HABIT OF SINGLE SERVE AT HOME CONSUMPTION DURING THE ME TIME OCCASION

Single serve offers the best consumer experience and perfectly complements ME TIME moments.





Source: CBL, Screen Time, CSE, Volume

for female



## BY LEVERAGING THE FULL PORTFOLIO APPROACH TO CAPTURE THE FULL POTENTIAL OF THE ME TIME AT HOME OCCASION



## OCCASION DEEP DIVE

WHO?

WHY?

HOW?

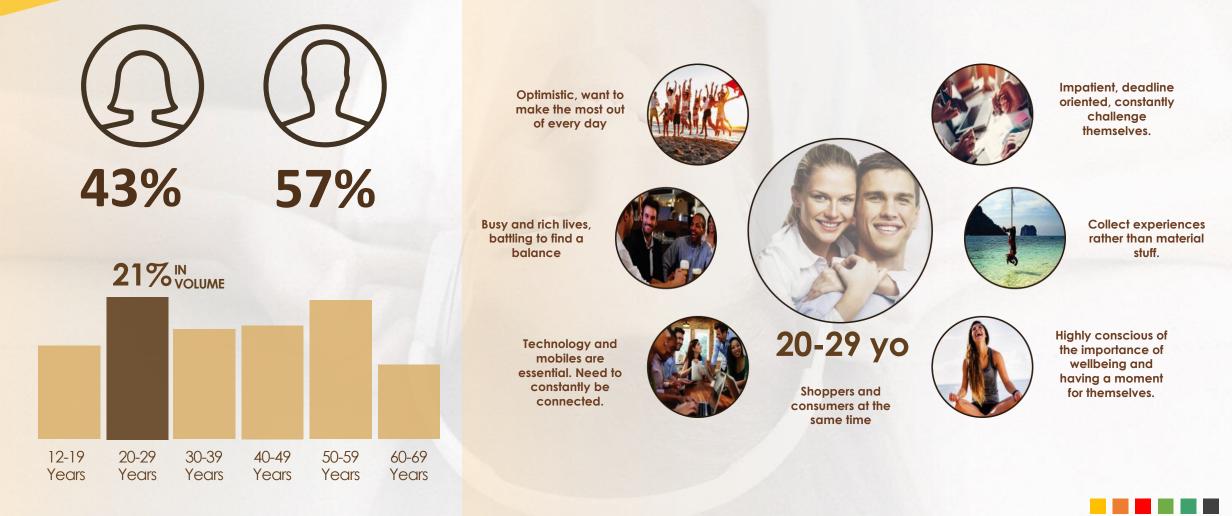
WHAT?

WHERE?

WHEN?

WHO?

#### YOUNG ADULTS, WITH RICH AND BUSY LIVES NEEDING A MOMENT FOR THEMSELVES TO RECHARGE AND UPLIFT IN THE COMFORT OF THEIR HOME



11

## WHY?

## DIFFERENT SHOPPER SEGMENTS HAVE DIFFERENT NEEDS WHEN IT COMES TO ME TIME AT HOME

#### FEMALE

## PAUSE

- WATCHES videos / recipes online
- LISTENS to music
- SCROLLS Instagram feed
- Constantly **CHATS** with friends
- **READS** a good book

## ENERGIZE

• WATCHES a match / movie / show

MALE

- LISTENS to music
- **READS** online news
- Constantly **CHATS** with friends
- **PLAYS** video games



WHEN?

## THROUGHOUT THE WHOLE DAY, IN SEVERAL DAY PARTS, MOSTLY AFTERNOON AND EARLY EVENING

Takes 1/5 of the day...



Yet happens in several day parts Early Mid-After-Early Midday Morning Morning noon Evening





## THROUGH ACTIVE RELAXATION OR TOTAL WIND OWN

## **RELAX/WINDING DOWN**

#### **MY ACTIVE RELAX**

#### TOTAL RELAX/WIND DOWN

More dynamic time with oneself. Actively relaxing and getting in touch with the world.

Reading books, newspapers, surfing the internet, playing video games, etc.

Quiet moment with no activity. Tuning out and letting the stress out.

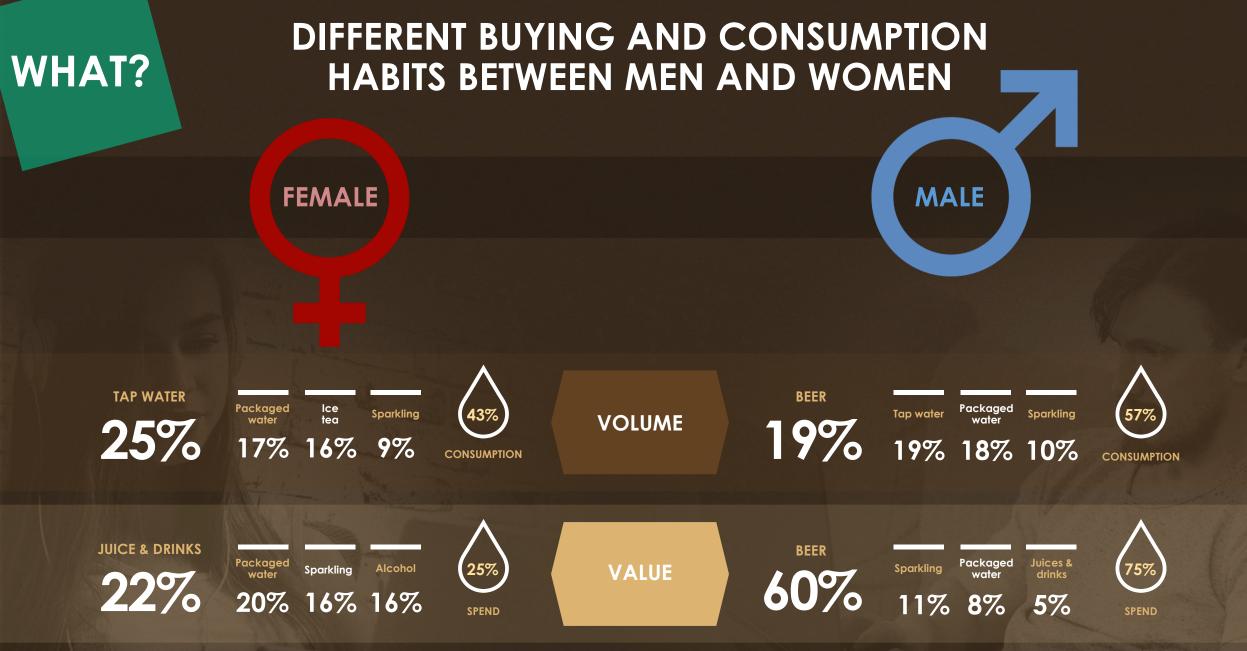
Watching TV, "home spa/hot bath", doing nothing, listening to the music.

Source: Winning at home for Coca-Cola, 2016 Integrated research

#### HOW? **ME MOMENTS ARE OFTEN ACCOMPANIED BY THE** SCREEN, OFTEN MORE THAN ONE (57% SCREEN TIME)



Source: Eurostat 2015 CEE



Source: CBL, Screen Time, CSE, Volume & Revenue

## WHERE? MAJORITY OF THE SHOPPING FOR THE OCCASION HAPPENS IN MEDIUM&LARGE STORE FORMATS DURING STOCK UP MISSION

There are a number of opportunities to drive "ME TIME AT HOME" into the large baskets



.....................

Shopping is highly

planned (shopping list and

price comparisons).

•••••••••••••••••••

Very likely to buy

NARTDs for

at-home consumption.

Main shopping missions: stock-up and special occasions.

Shops usually **right after payday.** 

Spends more

(51.3 EUR on average

per trip) and buys

more products (20 items on average).

Shops mostly between Is Friday and Sunday.

**FRI-SUN** 

....

ls **accompanied by a family member** when shopping.

4

.....



Large basket shoppers are much more relaxed in store and more open to new experiences and impulse purchases.

shopping mode

**F** Key insight: "Browsing"

> + \_

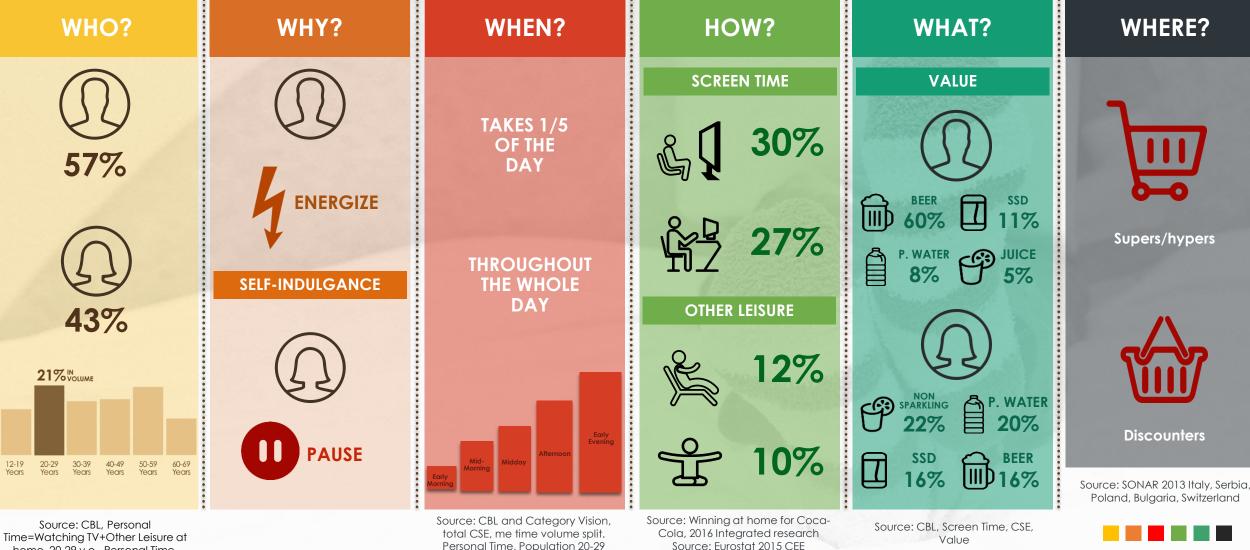
Visits most of the

Visits **most of the** store, covering all departments.

Buys lots of items on promotion. Sticking to the budget is very important. UVery prone to impulse purchases (58% impulse level within stock up mission)



## **ME TIME AT HOME OCCASION SUMMARY**



home, 20-29 y.o., Personal Time, Population 20-29 y.o., Revenue.

Personal Time, Population 20-29 y.o., Revenue.

## STRATEGIC FRAMEWORK

CROSS-CATEGORY PLACEMENT PORTFOLIO

IN-STORE ACTIVATION

OBPPC

DIGITAL APPROACH STRATEGIC PARTNERSHIPS



## **IN ORDER TO ADDRESS DIFFERENT SHOPPER SEGMENTS** AND NEEDS, WE NEED A STRONG PORTFOLIO APPROACH WITH A CLEARLY DEFINED ROLE FOR EACH BRAND





MYCOKE AND FUZETEA ARE THE LEADING BRANDS FOR THE ME TIME AT HOME OCCASION, FOLLOWED BY SCHWEPPES. OTHER BRANDS HAVE A SUPPORTING ROLE.



Brand hierarchy of importance for ME TIME AT HOME.





### EACH BRAND IN OUR PORTFOLIO HAS A CLEARLY DEFINED ROLE WITHIN THE ME TIME AT HOME OCCASION

## **RELAX/WINDING DOWN**

|                   | MY ACTIV  | /E RELAX  | TOTAL RELAX/WIND DOWN  |  |  |  |  |  |  |
|-------------------|---|---|--|--|--|--|--|--|--|
|                   | CearCola  | Schweppes   | Schweppes<br>Mixing  |  |  |  |  |  |  |
| BRAND ATTRIBUTES  | Activating, energizing, social, sparkly,<br>light-hearted, special, a treat                                 | Sharp, dry and tingling adult taste,<br>complex flavors with sophisticated<br>twist, refreshing | Multi-layered drink,<br>a fusion of ingredients to be<br>discovered slowly, sip by sip   | Iconic mixer, perfect<br>partner to alcohol  |  |  |  |  |  |
| BRAND BENEFIT     | TO UPLIFT   | TO ENGAGE SENSES AND<br>ENHANCE EXPERIENCES   | TO UNWIND<br>AND RELAX   | TO UNWIND AND<br>ENHANCE EXPERIENCE  |  |  |  |  |  |
| <b>BRAND ROLE</b> | A me moment of digital<br>socialization: a daily moment in<br>which "I reconnect with the outside<br>world" | Recharges and refreshes me both<br>physically and mentally. Mood<br>enhancer for leisure time.  | Me moment in which I completely<br>disconnect from the world and<br>connect to my senses | Combined with alcohol to enhance<br>a high quality flavor experience for<br>a wind down and the start of the<br>relaxing evening. Mood enhancer. |  |  |  |  |  |



OBPPC

### FOR ME TIME A "ME-PACK" IS NEEDED

PERFECT FIT

#### MOMENT OF ENJOYMENT ALONE

#### IS ABOUT "ME"















### LEVERAGING THE 2 MOST FREQUENT CONTENT TYPES IN ME TIME AT HOME

| Content TYPE & FORMAT | PAUSE: ENTERTAINMENT<br>VIDEO, YOUTUBE, ONLINE STREAMING | RE-ENERGIZE: GAMING<br>GAMES & STREAMING |
|-----------------------|--|--|
| Consumer<br>mindset   | SEEK ENJOYMENT, OPEN,<br>EXPLORING, NO PURPOSE           | FULLY ENGAGED,<br>NOT TO BE DISTRACTED   |
|                       | <image/>   |  |

#### **INTEGRATE & ENGAGE**

Opportunity

#### ADD MORE VALUE TO EXPERIENCE





### **BUILD STRATEGIC PARTNERSHIPS** WITHIN THESE 2 CONTENT TYPES



Note: "For illustration purposes only - not approved for use towards external parties".



## DIGITAL IS VERY IMPORTANT TO CAPTURE THE ME TIME MOMENTS WITH SCREENS

## PRE-SHOP COMMUNICATION TOOL

CONTENT AND SOURCE OF PARTNERSHIP E-COMMERCE PATH TO PURCHASE

**3 AREAS WHERE DIGITAL IS CRITICAL** 





### **3 MAIN AREAS TO TACKLE IN STORE:**

#### SHELF

It is critical to place a special focus on the shelf. If you have to do one thing only, try to tackle the shelf.

Create a special occasion section as a joint customer value plan.

#### **PERMANENT DISPLAY**

#### TEMPORARY DISPLAY

For temporary/permanent display we can leverage whenever possible Occasion Brand Bundle Offer approach level 2&level 3

Note: Go to the appendix for the Occasion Brand Bundle Offer approach detailed explanation





## **CROSS-CATEGORY PLACEMENT APPROACH**

Choose another ME TIME related category used for me time enjoyment and relaxation



Make sure that it is a good fit with beverages and our portfolio (example MyCoke and salty snacks)

Make sure that you position adequate communication and product in male or female store sections/categories (see the appendix for category bought split by men and women)



Position the product in the dominant beverage category for ME TIME AT HOME



Go for the categories with high incidence in large baskets and store sections with high traffic



Do not go for categories which are food/meal related as this falls under Coke&Meal





## MAIN CRITERIA FOR CROSS-CATEGORY PLACEMENT

## ZONE TRAFFIC

Is the particular interruption point placed in the store section with high traffic?

## vs FIT WITH THE BRAND

Does the particular interruption point fit with brands in our portfolio?

IF THERE IS ONLY ONE POSITION AVAILABLE IN STORE, TRAFFIC ZONE HAS A HIGHER PRIORITY VS BRAND FIT WHEN MAKING THE SELECTION



#### CROSS-CATEGORY PLACEMENT

## **CROSS-CATEGORY PLACEMENT MATRIX**

| Priority level | Store section                            | Leading brand   | Shared brands                       | Skewed towards the TG:                    | Rationale/supporting data   |  |  |
|----------------|--|---|-------------------------------------|---|---|--|--|
|                |  |   |                                     |   |   |  |  |
| 1              | Beer                                     | MyCoke  | Schweppes                           | Male<br>(bought more often by men)*       | Beer as the dominant drink in the ME TIME at<br>home for men  |  |  |
| 2              | Magazines/newspapers fuzetea             |   | MyCoke, Schweppes, flavored water   | Female and Male                           | Perfect companion for ME TIME at home<br>for male and female  |  |  |
| 3              | <b>3 Spirits</b> MyCoke, Schweppes       |   |                                     | Male<br>(bought more often by men)*       | Perfect for mixing with spirits for me time at<br>home. Spirits are having resurgence in the me<br>time at home occasion.                       |  |  |
| 4              | Snacks                                   | Snacks MyCoke Fanta Male&Female<br>(bought by men and w |                                     | Male&Female<br>(bought by men and women)* | Complement beverages for me time at home<br>and watching TV, one of the categories with<br>highest incidence in the large basket<br>composition |  |  |
| 5              | 5 Coffee MyCol                           |   | fuzetea, Schweppes, flavoured water | Female&Male<br>(bought by men and women)* | Complement beverages for me time at home,<br>one of the categories with highest incidence in<br>the large basket composition                    |  |  |
| 6              | Movies                                   | MyCoke  | Schweppes, Sprite, Fanta            | Male                                      | Perfect for male entertainment  |  |  |
| 7              | Book section                             | fuzetea   | MyCoke, Schweppes, flavored water   | Female                                    | Perfect companion for Me time at home for<br>women (pause). Opportunity for cross promotion<br>(buy a bestseller book for a lower price)        |  |  |
| 8              | <b>Cosmetics</b> fuztea                  |   | MyCoke, Schweppes, flavored water   | Female                                    | Addressing the total wind down at home.<br>Beauty products have high incidence in the<br>large basket.  |  |  |
| 9              | Video games                              | fuzetea   | Schweppes, Fanta , Sprite           | Male                                      | Perfect for male entertainment  |  |  |
| 10             | Massagers/relaxation<br>products fuzetea |   | MyCoke, flavoured water             | Female                                    | Perfect fit with the ME TIME at home  |  |  |

Note: the interruption points are placed in the order of importance. For instance, if you have only one interruption points available go for the beer section as beer is one of the main source categories.

\*Sources: Growth Stories, 2016, SM, Italy (look at the table in the appendix for the supporting data) Romania IPP, 2016 (look at the table in the appendix for the supporting data)



## COMMUNICATION STRATEGY

## CAPTURING THE ME TIME AT HOME OCCASION WITH THE PORTFOLIO APPROACH WILL BE DONE IN TWO PHASES

| Phase 1  |   |       |       |     |      | Phase 2  |        |           |         |          |          |  |
|--|---|-------|-------|-----|------|--|--------|-----------|---------|----------|----------|--|
| January  | February  | March | April | May | June | July   | August | September | October | November | December |  |
| CoarGola LEADING BRAND IN ME TIME<br>AT HOME COMMUNICATION                 |   |       |       |     |      | LEADING BRANDS IN ME TIME <b>fuzetea</b> Cocce   |        |           |         |          |          |  |
| Supporting brands: Schweppes, Fanta,<br>Sprite, Natura Aqua flavored water |   |       |       |     |      | Supporting brands: Schweppes, Fanta,<br>Sprite, Natura Aqua flavored water   |        |           |         |          |          |  |
| fuzetea  | fuzetea BRAND LAUNCH COMMUNICATION  |       |       |     |      |  |        |           |         |          |          |  |
|  | fuzetea will need to reach the minimum level<br>of brand awareness and trial before making it<br>one of the leading brands for the ME TIME AT<br>HOME occasion. In this period, you should<br>leverage MyCoke as the leading brand. |       |       |     |      | As soon as fuzetea reaches a solid distribution<br>and brand awareness and trial, it will become<br>the leading brand with MyCoke for the ME TIME<br>AT HOME occasion. |        |           |         |          |          |  |
|  |   |       |       |     |      |  |        |           |         |          |          |  |

PHASE 1 - COMMUNICATION STRATEGY

PHASE 2 - COMMUNICATION STRATEGY

PHASE 1

## **COMMUNICATION STRATEGY**

### **TRANSITION ZONE**

The materials in this zone will be dedicated to the launch of new products, thus will not be addressed in this toolkit



## **IMPULSE ZONE**



LEADING COMMUNICATION BRAND

#### TOUCHPOINTS

Adjacencies/displays in different store sections:

- Beer
   Spirits
- 3. Snacks
- 4. Coffee
- 5. Movies
- 6. Video games
- 7. Magazines

Additional customer activation: "Me time" corner

## **DESTINATION ZONE**

\*This is a critical area to communicate the occasion



LEADING COMMUNICATION BRAND

#### TOUCHPOINTS

1. Pick&Mix station. In the first phase you can pick 5 TCCC products and get fuzetea for free in order to build trial.

> 2. Special occasion fixture display (in the sparkling category)



PHASE 2

## **COMMUNICATION STRATEGY**

### **TRANSITION ZONE**

The materials in this zone will be dedicated to the launch of new products, thus will not be addressed in this toolkit

## **IMPULSE ZONE**

## fuzetea CoceCola

LEADING COMMUNICATION BRAND

#### TOUCHPOINTS

Adjacencies/displays in different store sections: 1. Beer 2. Spirits 3. Snacks 4. Coffee 5. Movies 6. Video games 7. Magazines 8. Books 9. Cosmetics 10.Relaxation products

Impressive display Creative display "ME TIME" "Me time" corner

## **DESTINATION ZONE**

\*This is a critical area to communicate the occasion



LEADING COMMUNICATION BRAND

#### TOUCHPOINTS

1. Pick&Mix station. Pick 5 TCCC products and choose one for free.

2. Special occasion fixture display (in the sparkling category)

3. Special occasion fixture display (in the RTD tea category).



## **MESSAGING GRID**

#### **IMPULSE – MY COKE LEADING**

lt's your time. Choose your favorite drink.

It's your time. Enjoy it with your favorite drink.

It's your time. Refresh with your favorite drink.

Refresh your time

#### SCREEN TIME CONNECTED:

It's movie time. Tune in with your favorite drink.

Your time ON! Choose your favorite drink.

Switch on your refreshing moment.

Plug in for some refreshing me time

Start the ME TIME button. Pick your favorite drink.

#### IMPULSE – FUZETEA LEADING

Savor your moment

Savor your delicious moment

Enjoy your delicious moment at home

Relish your delicious alone time

Reconnect to your senses

Reconnect with yourself

#### **IMPULSE PROMO**

#### MyCoke:

It's your time. Choose your favorite drink and get free movie

It's your time. Buy a multipack and get one can for free

#### fuzetea:

Savor your moment. Buy a multipack and get a free magazine

Refresh your time with favorite drink and a free movie

Savor your moment with delicious taste and a free book

#### DESTINATION

Add your favorite drink to your time

Choose your favorite drink for your moment

Enjoy your time. Take your favorite drink.

It's your time. Pick your favorite drink.

Choose a drink for your moment at home.

#### MIXABILITY (SPIRIT SECTION):

Whiskey & Coca-Cola The Perfect Mix. Enjoy your time.

Vodka & Schweppes. The Perfect Mix. Enjoy your time.



## **COKE LED COMMUNICATION – STANDARD TEMPLATE**



Click on the picture to go to the hi-res file on the DmeX

Note: fuzetea flavor Black tea lemon lemongrass was used for the presentation purposes. Place on the visuals the multipack flavor that you want to push locally.

## **COKE LED COMMUNICATION - PROMO**







### VERY IMPORTANT TO PRIORITIZE COKE ZERO!

When Coke Zero bottle in the visual is highly visible, use Coke Red multipack in the promo part as the leading brand.



IT'S YOUR TIME. CHOOSE YOUR FAVORITE DRINK.



When Coke Zero bottle in the visual is not so visible, Coke Zero multipack must be used to assure visibility.

If three



IT'S YOUR TIME. CHOOSE YOUR FAVORITE DRINK.



When Coke Red bottle is used in the visual, Coke Zero multipack must be presented in the promo part.



IT'S YOUR TIME. CHOOSE YOUR FAVORITE DRINK.

ME. PRINK. MUltipacks are shown in the promo part, place Coke Zero in the top to assure the most prominent position.

## **AVAILABLE VISUALS FOR COKE LED COMMUNICATION**





















Note: click on the images to go to the hi-res photos on the DmeX

## **FUZETEA LED COMMUNICATION – STANDARD TEMPLATE**





## **FUZETEA LED COMMUNICATION - PROMO**





## **SCHWEPPES LED COMMUNICATION**



Click on the picture to go to the hi-res file on the DmeX



## MIXABILITY (COKE&SCHWEPPES COMMUNICATION)



WHISKEY&COCA-COLA. THE PERFECT MIX. ENJOY YOUR TIME.





#### VODKA&SCHWEPPES. THE PERFECT MIX. ENJOY YOUR TIME.

### Schweppes led

Note: it is up to market commercial strategy to push Schweppes can multipack or glass multipack

#### Coke led

These photos are available in low-res only.



## **KV GRID**



#### IMPULSE PROMO

**DESTINATION** 

IMPULSE



IT'S YOUR TIME.

PICK & MIX 5 DRINKS,

GET ONE FOR FREE



illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.



Natur Roua

WHISKEY&COCA-COLA

THE PERFECT MIX.

ENJOY YOUR TIME.

VODKA&SCHWEPPES. THE PERFECT MIX. ENJOY YOUR TIME.



CLOSE THE DAY WITH A SIP OF CHARACTER



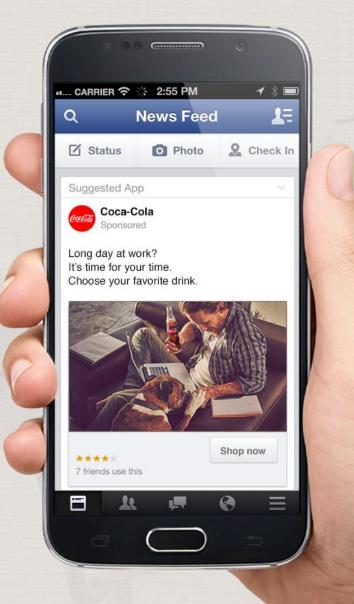
# PRE-SHOP



## **TIME-TARGETED FB ADS**

#### **EXPLANATION**

Time-targeted FB ads and web banners during specific times in the day (end of the working day when people are tired and eager to go home to relax) to encourage people to have a relaxing time at home. Ads contain a specific offer for a multipack purchase as well as some ME TIME related content to be downloaded for free (relaxing music, movie, e-book, etc.)



## **TARGETED BANNERS**

#### **EXPLANATION**

Targeted ads designed to remind and encourage users to have ME TIME moments at home, containing special offers, along with some free ME TIME related content (movies, video content, music albums, subscriptions to video and music streaming services, etc...) with a link to buy our products online and get the free content.

#### MOST VISITED WEBSITES DURING ME TIME

travel booking, computers, car sale, electronic sale, news, sports, health, gaming, etc.

#### **VIDEO AND MUSIC PLATFORMS**

Youtube, Vevo, Vimeo, Twitch, Daily, Spotify, Deezer, Google Play, iTunes, Stereomood, Pandora, Mixcloud,

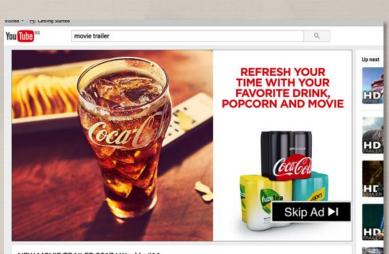
#### **E-BOOKSTORE**

Amazon.com/Amazon Kindle Store, Google eBooks/ Google Play, iBooks, Barnes and Noble Nook Store,





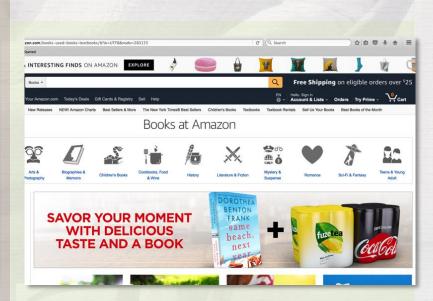
See all



NEW MOVIE TRAILER 2017 | Weekly #16

#### Example:

Ad before a movie trailer at YouTube with a direct link to purchase a promo offer for movie night



Example: Multipack and bestseller book for a special price

#### **Example:**

J find the

Travel booking - "It is time to book some time for yourself @home", or "Weekend "stay-at-home" by yourself"



## **ME TIME CORNER**

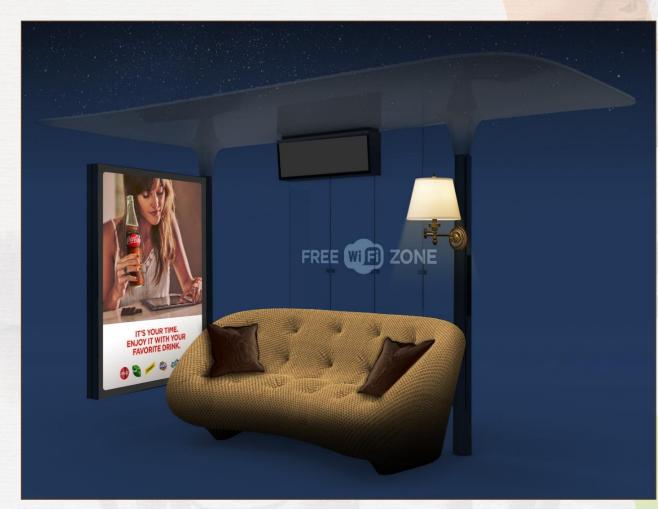
WHERE

Bus stations (close to a store)

#### **EXPLANATION**

Transforming the bus station into an interactive ME TIME@HOME corner, equipped with sofa instead of the bench, offering free Wi-Fi hotspot, in close proximity to a participating customer store.

When connected to sponsored Wi-Fi, the shopper gets the voucher to be redeemed at the nearby store.





## **NFC TAGS IN PUBLIC AREAS**

#### WHERE

Everywhere where people are tired/stressed and crave for me time at home

#### **EXPLANATION**

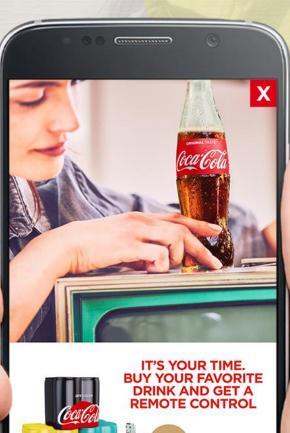
In public areas (inside buses, trams, subway, parks, waiting rooms) place ME TIME stickers with NFC tags which make them interactive and add value.

When activated, link from the NFC tag invites people to relax and have a ME MOMENT at home with one of our products, promotes special offers and directs to short ME TIME related content (sounds, music, videos, etc.)



## TV GUIDE WITH FREE MOVIE DOWNLOAD AND VOUCHER





**REDEEM COUPON** 

#### Sponsored print

**EXPLANATION** 

Sponsored printed weekly tv guide with QR code to download the latest offer:

1. Multipack & popcorn as well as the free movie for an ideal movie night.

2. Purchase multipack and get a remote control holder for free.

## CROSS PROMOTIONS WITH ME TIME RELATED CATEGORIES/STORES

#### **EXPLANATION**

Placing our product and our communication and promo offer in stores that sell other me time related products such as: computers, TV, couch furniture, phones, books, music, etc.

Place a sticker in these store areas with a QR code to download the promo offer or some free me time related content (free movie download, music list, e-book, etc.) by activating different partnerships (for instance Netflix for a free movie download).



## **ME TIME GAME**

## **IT'S YOUR TIME. SCRATCH YOUR** 4-PACK! Natur Aqua.

**EXPLANATION** 

offline purchase.

Simple promotional gamification

shoppers with the brand and

tools in the form of interstitial mobile

ad or a simple FB game to engage

present coupons as prizes to trigger

Since gaming is very popular during

the me time moments, the game

will also engage shoppers during

their moments at home.

#### SCRATCH GAME

Swipe the screen to simulate the scratching. Logos of Coca-Cola brands appear when the surface is scratched. If 3 fields are the same, it's a win. User gets a discount voucher – buy 2 multipacks of Coca-Cola brand that he/she won and get one for free.

#### IT'S YOUR TIME. SCRATCH YOUR 4-PACK!



Natur Aoua.

## IN-STORE ACTIVATIONS

#### **OBJECTIVE**

Communicate the ME TIME at home occasion and trigger impulse purchases

#### WHY IT WORKS

Modular solution allows easy adaption to the available in store space as well as portrays different brands effectively. Double-sided header communicates both MyCoke and fuzetea as leading brands, thus assuring a strong portfolio approach.

| Leading brand    |                       |
|------------------|-----------------------|
| Supporting brand | Schweppes FANTE Rouge |

## **MODULAR DISPLAY**





Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

Back

## **IMPRESSIVE MULTIPACK DISPLAY**

#### OBJECTIVE

Disrupt the shopper with the attention grabbing impressive display, communicate the ME TIME at home occasion, and trigger impulse purchases

#### WHY IT WORKS

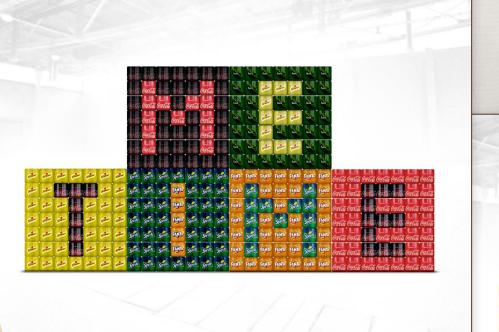
Very impressive and disruptive solution catches shopper's attention and instantly communicates ME TIME AT HOME occasion. It promotes the single serve multipack in a very effective and eye-catching way.

Leading brand



**Supporting brand** 





Printed image on the cardboard in the back of the installation so that when shoppers take the multipacks the visual ME TIME made out of multipacks remains.

## **IMPRESSIVE MULTIPACK DISPLAY**

#### OBJECTIVE

Disrupt the shopper with the attention grabbing impressive display, communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

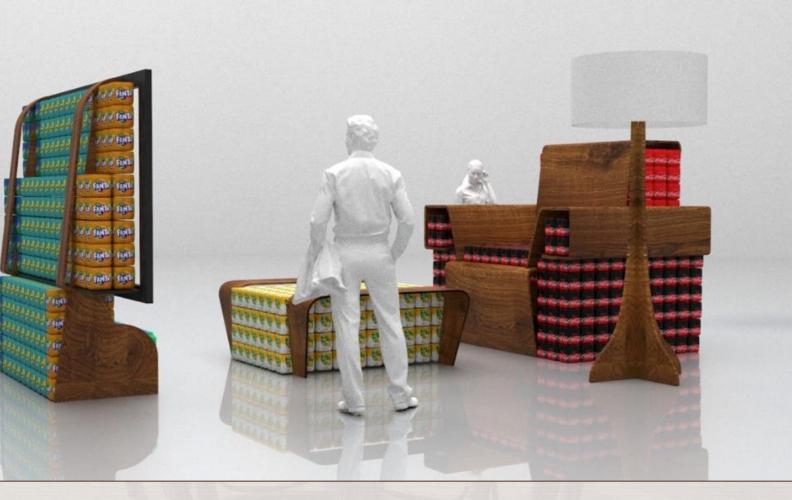
Very impressive and disruptive solution catches shopper's attention and instantly communicates ME TIME AT HOME occasion. It promotes the single serve multipack in a very effective and eye-catching way.

Leading brand



**Supporting brand** 





## **CREATIVE DISPLAY**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases

#### WHY IT WORKS

Leading brand

**Supporting brand** 

Very impressive and disruptive solution catches shopper's attention and instantly communicates ME TIME AT HOME occasion. Two-sided display addresses both key motivations for at home relaxation active relax for men and reading books/magazines for female. <image>

Front (male side)

Natur Aqua

FANTA

Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.



## **"ME TIME" DISPLAY**



Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Customer specific activation which connects our products with other products used for me time at home relaxation. Conveniently placed together in one shelf, instantly communicate the occasion and ease the shopping.



#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Placing our product in the section with beer which is the most frequently used beverage for men in the me time at home occasion. Since beer is more bought by male, using the man in the KV makes the communication more relevant.



## ria Jes

## **BEER SECTION**



## **SPIRITS SECTION – MIXABILITY (COKE&SCHWEPPES)**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases

#### WHY IT WORKS

Placing our product in the section with spirits to educate and encourage shoppers to mix our drinks with alcohol to wind down at home. Including recipes for mixing drinks to give shoppers ideas. Double-sided header/display captures both MyCoke and Schweppes mixability communication thus assuring portfolio approach.

Leading brand







Note: if you have only one interruption point and the display is not approachable by all sides, give priority to Schweppes

## **SPIRITS SECTION – SCHWEPPES ONLY**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Placing our product in the section with spirits to educate and encourage shoppers to mix our drinks with alcohol to wind down at home. This solution is for the situations when we cannot have 2-sided display. In that case, the focus should be on Schweppes.

CexCola

Leading brand









Option 1: (next to the vodka/spirit) Option 2: (not close to the vodka/spirit) Option 3: (not communicating mixability)

## **MAGAZINE/NEWSPAPER SECTION**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is used for leisure time at home. Possibility to create some special promo offers (such as free magazine with purchase of multipack).





Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

## **VIDEO GAMES SECTION**



Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is used for leisure time at home and capturing the "screen time".

Leading brand

Supporting brand

Con Cola



#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is used for leisure time at home and capturing the "screen time".

Leading brandImage: Comparing brandSupporting brandSomephysic Difference

## **MOVIES SECTION**



## **MOVIE NIGHT DISPLAY**



Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

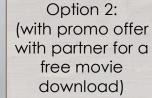
Connecting with a category that is used for leisure time at home and capturing the "screen time". Promoting movie night and combo offers with categories used for movie night such as movies and popcorn. Movie night display is disruptive and puts the shopper into the me time at home mood.



Note: "Partner brand for illustration purposes only – not approved for use towards external parties".



Option 1: (with movie on the DVD)







POPCORN AND MOVIE



REFRESH YOUR TIME WITH FAVORITE DRINK, POPCORN AND MOVIE



## **BOOK SECTION**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is used for the leisure time at home. The reading corner is visually very disruptive and immediately puts shopper in the ME TIME at home mode. Can be used to promote different offers (such as "buy a multipack, get a bestseller for a special price").

Leading brand

Supporting brand





Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

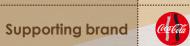
#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is used for leisure time at home.

Leading brand



fuzetea

## **MUSIC SECTION**



Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

## **SNACK SECTION**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category that is one of the most often used for leisure time at home. Placing the snack inside the display facilitates the purchase for the shopper.

Leading brand

Supporting brand





#### **OBJECTIVE**

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Connecting with a category which complements our beverages during me time at home. Coffee is one of the categories with the highest incidence in the large basket.

Leading brand



Natur Aqua.

## **COFFEE SECTION**



**OBJECTIVE** 

impulse purchases.

WHY IT WORKS

time at home mode.

Communicate the ME TIME at home occasion, and trigger

Addressing the total wind down relaxation at home (home spa). Female skewed, putting the shopper immediately into the me

## **COSMETICS SECTION**



Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

Leading brand



fuzetea

Natur Aqua

Supporting brand

## **MASSAGERS/RELAXATION SECTION**

#### OBJECTIVE

Communicate the ME TIME at home occasion, and trigger impulse purchases.

#### WHY IT WORKS

Addressing the total wind down relaxation at home. Female skewed, putting the shopper immediately into the me time at home mode.





## DESTINATION ZONE

## **PICK AND MIX SOLUTION**





#### OBJECTIVE

Create a strong association to the ME TIME at home occasion and provide choice of beverages for this occasion.

#### WHY IT WORKS

Leading brand

Supporting brand

Gives shoppers opportunity to pick and mix the beverages they want for the me time at home occasion and get one drink for free.

FANTE Sprite

## DESTINATION ZONE

### **SPECIAL FIXTURE OCCASION DISPLAY**

#### OBJECTIVE

Create a strong association to the ME TIME at home occasion and provide different beverage options.

#### WHY IT WORKS

Special fixture grabs shopper's attention. It clearly communicates the occasion and offers portfolio choice of beverages suitable for the me time at home occasion.

Leading brandImage: Constraint of the second of



**Option 1:** 

Placed in the sparkling section, MyCoke as the leading communication brand



Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

**Option 2:** 

Placed in the RTD tea section, fuzetea as the leading communication brand



## PICTURE OF SUCCESS



DESTINATION ZONE Pick and Mix



IMPULSE ZONE Secondary double-sided display JOG

## **PICTURE OF SUCCESS**



**DESTINATION ZONE** Pick and Mix (sparkling category)



**DESTINATION ZONE** Special occasion fixture (ice tea category)



a

**IMPULSE ZONE** Creative display

**IMPULSE ZONE Beer adjacency** 



## **PICTURE OF SUCCESS**



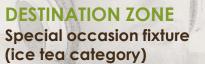
DESTINATION ZONE Pick and Mix (sparkling category)

**IMPULSE ZONE** 

IMPULSE ZONE Beer adjacency

Spirits adjacency display









IMPULSE ZONE Impressive display



IMPULSE ZONE Book section corner

# E-COMMERCE

#### THE RISING IMPORTANCE OF THE E-COMMERCE

#### **E-COMMERCE REPRESENTS**

## 4/o OF TESCO'S SALES VALUE

Source: Prezi.com, Tesco customer data, Poland

## 2017-2020 CAGR +18%

Source: Retail Net Group report on retail landscape and channel dynamics 2015





Source: Dunnhumby



HIGHER IN VALUE THAN OFFLINE BASKETS

Source: Dunnhumby

#### IMPORTANT TO BE PRESENT IN EVERY STEP OF THE SHOPPER E-COMMERCE JOURNEY AND TO ASSURE STRONG VISIBILITY

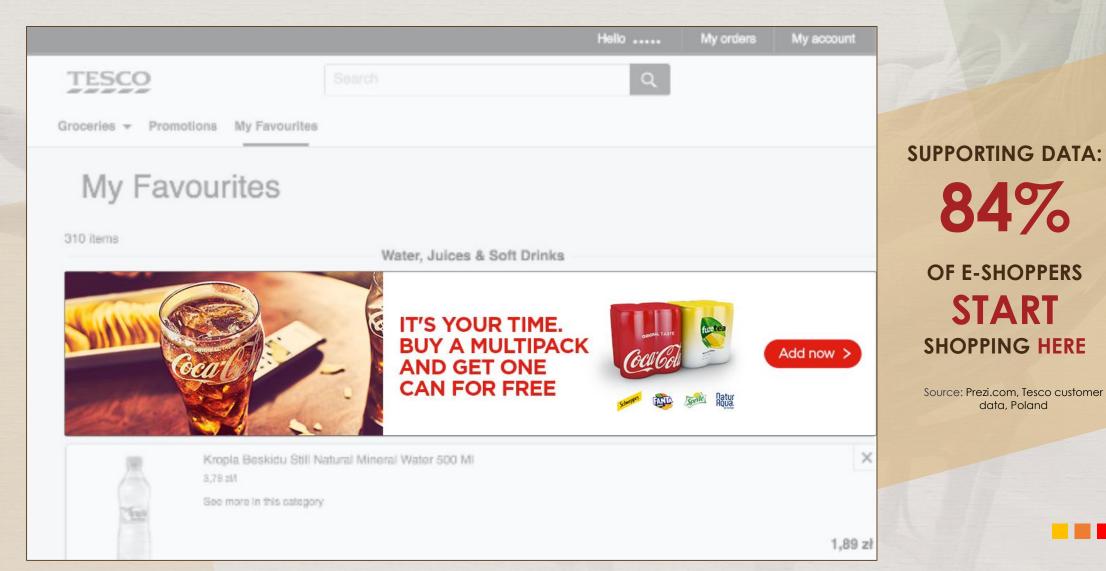


#### **HOME PAGE BANNER**

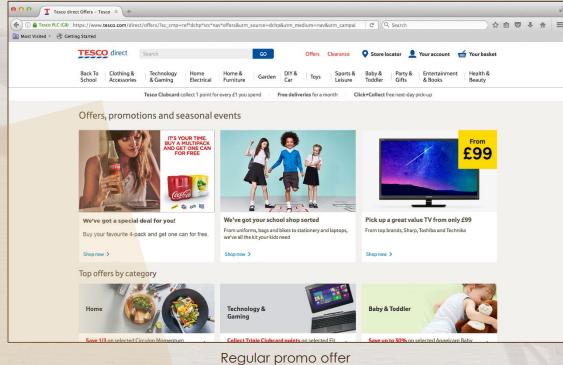
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### **MY FAVORITES**

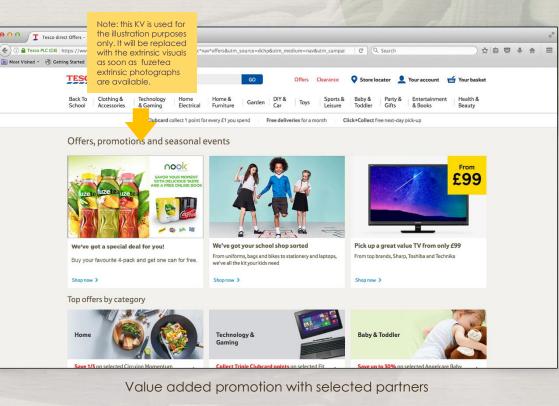


#### **SPECIAL PROMO SECTION**



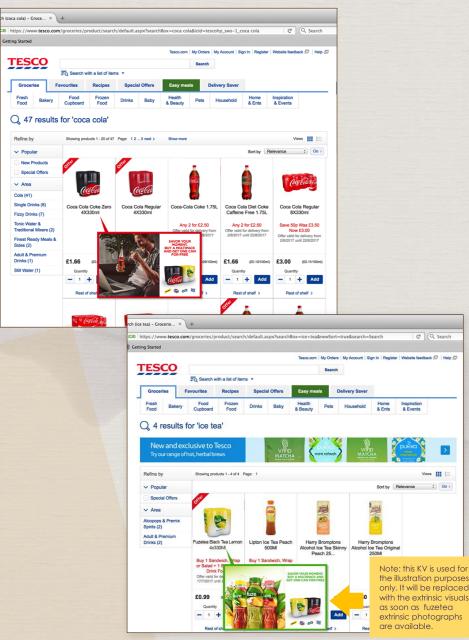
Regular promo offer

(buy a multipack and get one can for free)



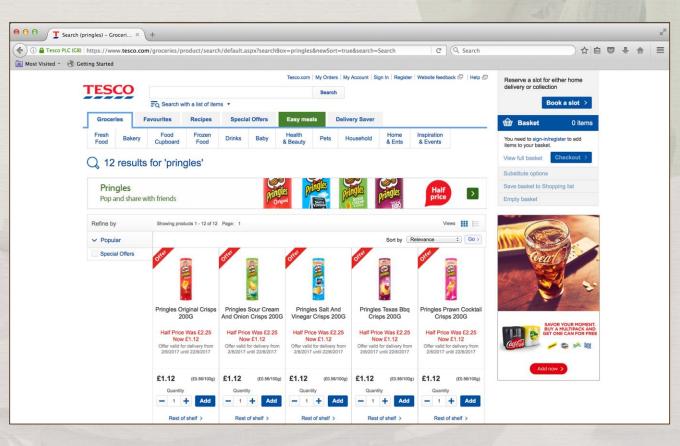
(buy a multipack and get a free online book)





Searching for the beverages

#### SEARCH



Searching for other me time at home related categories (for instance snacks)



#### **BEVERAGE CATEGORY BANNER**

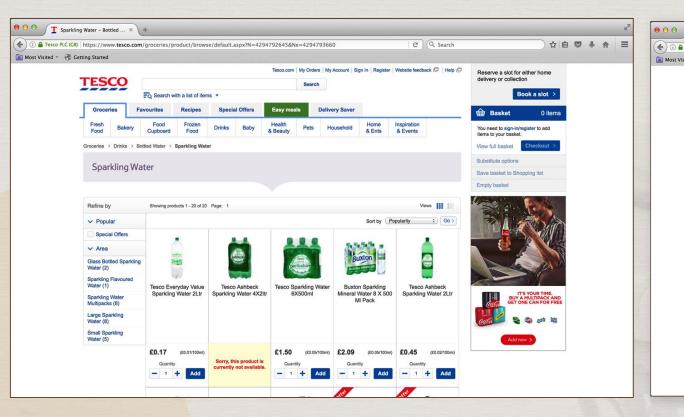
| i) 🔒 Tesco PLC | (GB) https://ww   | w.tesco.co   | m/groceries/d                | epartment/d               | efault.aspx                     | ?N=42947               | 92677&Ne=4                  | 2947936  | 60                                |                          | C                            | Q Search                                |
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|                | Grocer  | ies  | Favourites                   | Recipes                   | Specia                          | al Offers              | Easy mea                    | als      | Delivery Saver                    |                          |                              |   |
|                | Fresh<br>Food   | Bakery   | Food<br>Cupboard             | Frozen<br>Food            | Drinks                          | Baby                   | Health<br>& Beauty          | Pets     | Household                         | Home<br>& Ents           | Inspiration<br>& Events      |   |
|                |   |  |                              |                           |                                 |                        | Vinles                      |          |                                   |                          |                              |   |
|                |   |  |                              |                           |                                 | - L                    | Drinks                      |          |                                   |                          |                              |   |
|                | D   |  |                              |                           |                                 |                        |                             |          |                                   |                          |                              |   |
|                | DI  | owse ou  | r selection c                | of drinks, w              | <i>ith</i> some                 | thing to               | suit every o                | occasio  | n and every n                     | nember o                 | of the family                | .Find                                   |
|                | DI  | your fav   | r selection o<br>ourite from | of drinks, w<br>our great | vith some<br>range, ind         | thing to<br>cluding s  | suit every o<br>oft drinks, | chilled  | n and every n<br>fruit juice, tea | nember c<br>1, coffee, l | of the family<br>beer and wi | r. Find<br>ne.                          |
|                | DI  | owse ou<br>your fav  | r selection c<br>ourite from | of drinks, w<br>our great | <i>i</i> ith some<br>range, ind | ething to<br>cluding s | suit every o<br>oft drinks, | chilled  | n and every n<br>fruit juice, tea | nember c<br>a, coffee, l | of the family<br>beer and wi | r. Find<br>ne.                          |
|                |   | owse ou<br>your fav<br>inks & Coli   | ourite from                  | our great                 | rith some<br>range, ind         | ething to<br>cluding s | suit every of soft drinks,  | chilled  | n and every n<br>fruit juice, tea | nember c<br>a, coffee, l | beer and wi                  | ne.                                     |
|                | Fizzy Dr  | your fav   | ourite from                  | of drinks, work our great | <i>i</i> ith some<br>range, ind | ething to<br>cluding s | suit every of off drinks,   | ccasio   | n and every n<br>fruit juice, tea | nember c<br>a, coffee, l | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND<br>AN FOR FREE |
|                | Fizzy Dr  | your fav<br>inks & Coli<br>Smoothie  | ourite from                  | of drinks, w<br>our great | <i>i</i> ith some<br>range, ind | ething to<br>cluding s | suit every of coft drinks,  | ccasio   | n and every n<br>fruit juice, tea | nember c<br>a, coffee, l | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND                |
|                | Fizzy Dr<br>Juices &<br>Bottled   | your fav<br>inks & Coli<br>Smoothie  | ourite from                  | of drinks, wour great     | vith some<br>range, ind         | ething to<br>cluding s | oft drinks,                 | chilled  | n and every n<br>fruit juice, tea | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND                |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash   | your fav<br>inks & Coli<br>Smoothie<br>Water   | a a                          | our great                 | vith some<br>range, ind         | thing to cluding s     | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND                |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash<br>Adult Dr                                     | your fav<br>inks & Coli<br>Smoothie<br>Water<br>& Cordial  | a<br>a<br>es<br>ers          | our great                 | vith some<br>range, ind         | ething to cluding s    | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND                |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash<br>Adult Dr<br>Kids & L                         | your fav<br>inks & Cola<br>Smoothie<br>Water<br>& Cordial<br>inks & Mix                            | a                            | our great                 | range, ind                      | ething to cluding s    | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND<br>AN FOR FREE |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash<br>Adult Dr<br>Kids & L                         | your fav<br>inks & Coli<br>Smoothie<br>Water<br>& Cordial<br>inks & Mix<br>unchbox E<br>& Energy D | a                            | our great                 | inth some<br>range, ind         | thing to cluding s     | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND                |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash<br>Adult Dr<br>Kids & L<br>Sports &             | your fav<br>inks & Coli<br>Smoothie<br>Water<br>& Cordial<br>inks & Mix<br>unchbox E<br>& Energy D | a                            | our great                 | range, ind                      | ething to cluding s    | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND<br>AN FOR FREE |
|                | Fizzy Dr<br>Juices &<br>Bottled<br>Squash<br>Adult Dr<br>Kids & L<br>Sports &<br>Milkshal | your fav<br>inks & Coli<br>Smoothie<br>Water<br>& Cordial<br>inks & Mix<br>unchbox E<br>& Energy D | a                            | our great                 | range, ind                      | ething to<br>cluding s | oft drinks,                 | chilled  | fruitjuice, tea                   | a, coffee, l             | SAVOR YOU<br>BUY A MUL       | JR MOMENT.<br>TIPACK AND<br>AN FOR FREE |

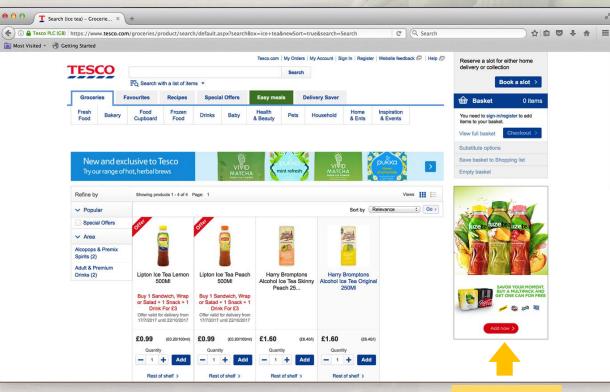
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Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.



#### **BEVERAGE SECTION**

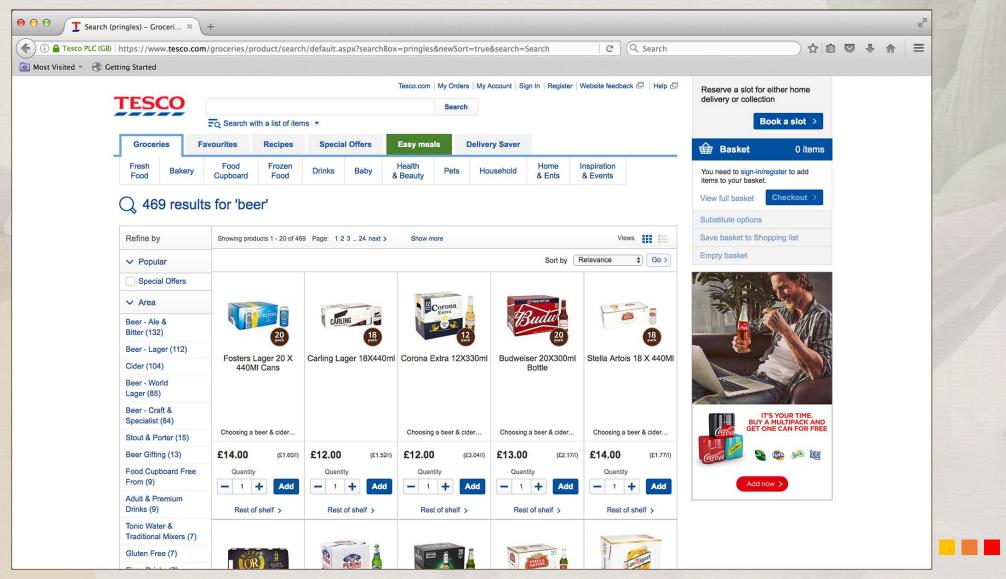




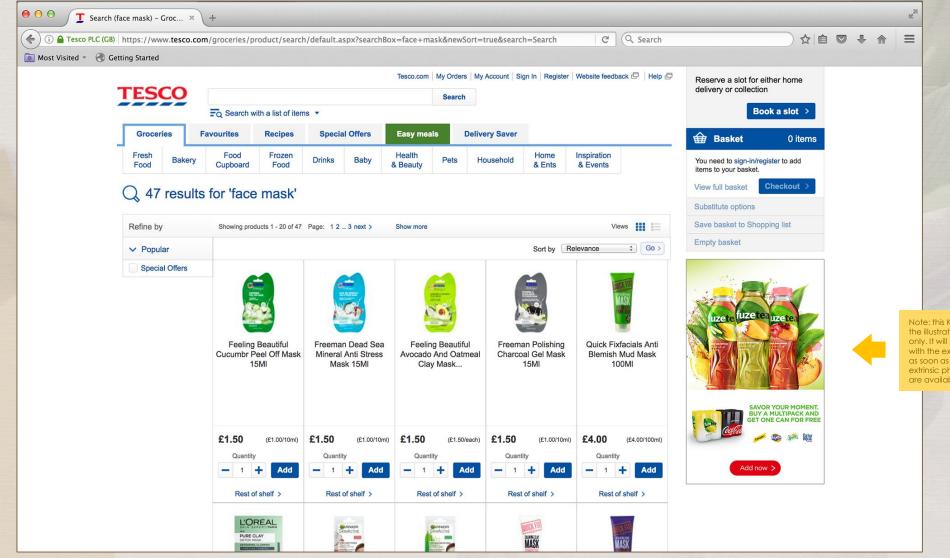
Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.



#### **CROSS-CATEGORY PLACEMENT - BEER**

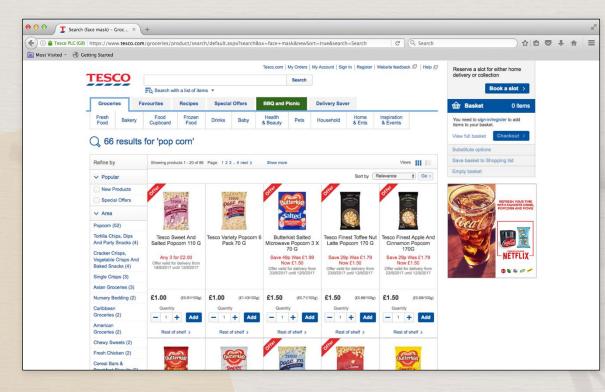


### **CROSS-CATEGORY PLACEMENT - COSMETICS**

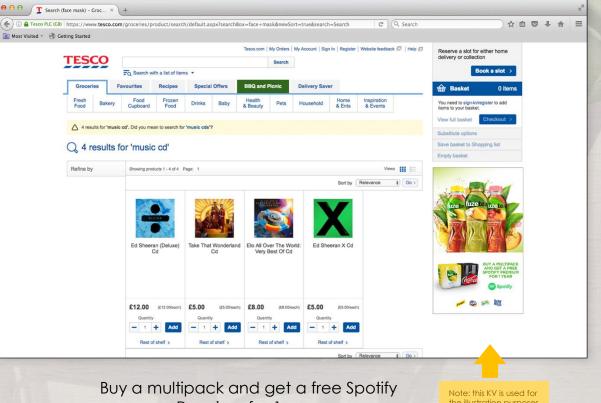


Note: this KV is used for the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

### **CROSS-CATEGORY PLACEMENT – PARTNERSHIP PROMO**



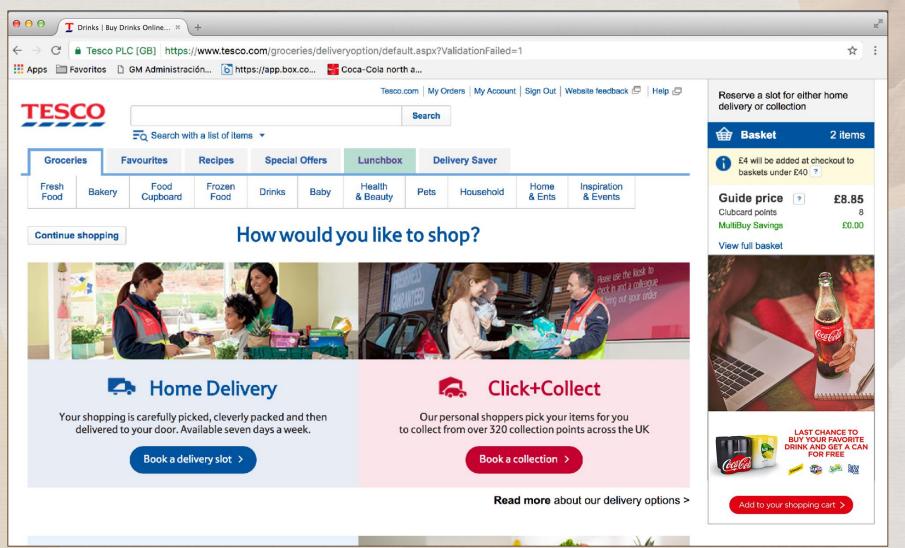
Buy a multipack and popcorn, and get a free movie download from Netflix



Premium for 1 year

the illustration purposes only. It will be replaced with the extrinsic visuals as soon as fuzetea extrinsic photographs are available.

#### CHECK OUT BANNER (FOR SHOPPERS WITHOUT MULTIPACK IN THEIR CART)



## PROMO APPROACH

#### PROMOTIONS SHOULD BUILD THE OCCASION, DRIVE PURCHASES, OFFER CHOICE AND VALUE ADDED PROMOTIONS WITH PARTNERS

BUILD OCCASION through value added promotions with a benefit for me moments at home



Buy a multipack & get a book on discount



Get a movie night combo offer (popcorn, movie and multipack)





AND GET ONE CAN FOR FREE.



Buy a multipack & get one can free

OFFER A CHOICE of beverages for the ME TIME occasion





Pick & mix 5 cans and get one can for free ACTIVATE PARTNERSHIPS through value-added promotions or on pack communication



Providing additional value through pack



Example: buy a multipack and get Spotify Premium for 1 year



## WHEN CAN "ME TIME" BE ACTIVATED?

- Coke&meal = #1 MyCoke priority executed consistently, continuous Full IMC plan activation and media investment for 3 consecutive years.
- 2. Metime@Home = #2 MyCoke priority and #1 fuzetea priority.
- 3. The right price ratio between Single Serve Multipacks and Key FC reference pack has been established.

## **MUST HAVE**

- A. Digital and inStore plan investment plan needed for 3 years to drive shopper & consumer link to occasion and pack.
- B. 3 years plan developing Single Serve share in mix.
- C. Picos with right merchandising at PBS and one additional display per store.
- D. 3 waves of dedicated promo support behind SS multipacks. Promo WD >50% in channel



#### FOUNDATIONS:

KBI

#### Relative Price Index of Can MP vs MS Frequency Pack: 1.6–1.8

Contribution in revenue of My Coke Can MPs vs total My Coke in Modern Trade

(optional to include Fanta and Sprite in metrics where those are available offers)

- Markets that are starting to build SS @home culture: >3%
- Markets in developing stage for SS @home:15%+
- Established SS @home markets: 30%+

2 WD of My Coke Can MPs in Hyper/ Supers WD of fuzetea Can MPs in Hyper/ Supers (see current SS MP WD slide in appendix as underperforming distribution vs standard)

#### MyCoke

- Starting point: >30%
- Developing stage: 70%+
- Established markets: 100%+

#### fuzetea

- Countries that didn't have Nestea MP: >30%
- Countries that had Nestea MP: apply distribution targets as per BP

- Additional IPP in the right zone related to ME TIME occasion assuming that there is already an execution of Coke&Meal (SSD & non-sparkling)

min +1 for SSDs & non sparkling (i.e. modular display)

Increase HH penetration and Driving Transaction in Metime@home occasion



Contribution in MyCoke and Fuzetea HH penetration and frequency based on BP brand KBI



## APPENDIX

## **OCCASION BASED BUNDLE OFFER ACTIVATION**



#### GUIDELINES

- Aim for incremental space for our brands prioritizing high traffic areas eg perimeter
- Target to be in first position in the path to purchase of target shoppers
- Execute adjacencies when they provide KO brands with an incremental POI in a part of the store where KO brands are currently not available

## CATEGORY BOUGHT SPLIT BY MEN AND WOMEN

|   | Total | Male | Female |                         |
|---|-------|------|--------|-------------------------|
| Base: Unwtd   | 339   | 110  | 229    |                         |
|   | 207   | 56   | 151    |                         |
| Dairy (e.g. milk, cheese, yoghurt)                                  | 61%   | 51%  | 66%    |                         |
|   | 80    | 24   | 56     |                         |
| Savoury snacks, crackers,   | 24%   | 22%  | 24%    |                         |
| Non-alcoholic ready to drink beverages (water, juices, sparkling or | 119   | 47   | 72     |                         |
| carbonated soft drinks, energy drinks, ice tea, etc)                | 35%   | 43%  | 31%    | more often<br>bought by |
| Beer, wine or spirits   | 63    | 31   | 32     | women                   |
| beer, write or spirits  | 19%   | 28%  | 14%    |                         |
| Chocolate, sweets, biscuits   | 103   | 31   | 72     |                         |
| Chocoldie, sweets, biscolis   | 30%   | 28%  | 31%    |                         |
| Fresh Fish, fresh Meat & Poultry                                    | 121   | 34   | 87     | more often              |
|   | 36%   | 31%  | 38%    | bought by               |
| Fresh Fruit & Vegetables  | 194   | 51   | 143    | men                     |
|   | 57%   | 46%  | 62%    |                         |
| Frozen goods (meals, meat, poultry, vegetables)                     | 66    | 21   | 45     |                         |
| mozen goods (medis, medi, poolity, vegetables)                      | 19%   | 19%  | 20%    |                         |
| Chilled prepared/ready to eat meals (salads, soup, sandwiches)      | 19    | 8    | 11     |                         |
| Chilled prepared/reddy to ear medis (salads, soup, sandwiches)      | 6%    | 7%   | 5%     | **                      |
| Non-food items (detergents, households goods etc.)                  | 87    | 20   | 67     |                         |
|   | 26%   | 18%  | 29%    |                         |
| None of these   | 12    | 6    | 6      |                         |
|   | 4%    | 5%   | 3%     |                         |

## CATEGORY BOUGHT SPLIT BY MEN AND WOMEN

| GENDER  |           | SENDER  |       |                  |
|---|-----------|---------|-------|------------------|
| TOTAL Man (a) Woman (b)                                   | Woman (b) | ∧an (a) | TOTAL |                  |
| Base: 207 58 149  | 132       | 71      | 203   | Base:            |
| Dairy (e.g. milk, cheese, yoghurt) 35.3 29.3 37.6         | 37.1      | 21.1    | 31.5  | eese, yoghurt)   |
| Savoury snacks, crackers, 1.9 0 2.7                       | 8.3       | 5.6     | 7.4   | acks, crackers,  |
| Beer 13 25.9 8.1 more of                                  | 7.6       | 15.5    | 10.3  | Beer             |
| Wine 2.4 6.9 0.7 bough                                    | 2.3       | 1.4     | 2     | Wine             |
| Spirits 1 3.4 0 WOM                                       | 6.8       | 7       | 6.9   | Coffee           |
| Coffee 14.5 13.8 14.8                                     | 7.6       | 2.8     | 5.9   | & Salty snacks   |
| Chips & Salty snacks 7.2 3.4 8.7                          | 17.4      | 12.7    | 15.8  | weets, biscuits  |
| Chocolate, sweets, biscuits 30.9 20.7 34.9                | 22.7      | 19.7    | 21.7  | ets, croissants) |
| Baked (bread, crumpets, croissants) 6.8 1.7 8.7 bough     | 15.9      | 19.7    | 17.2  | ry (not frozen)  |
| h Fish, fresh Meat & Poultry (not frozen) 30 22.4 32.9 me | 3.8       | 5.6     | 4.4   | etables, pizza)  |
| neals, meat, poultry, vegetables, pizza) 8.7 6.9 9.4      | 3.8       | 9.9     | 5.9   | , sandwiches)    |
| peat meals (salads, soup, sandwiches) 1.9 1.7 2           | 42.4      | 21.1    | 35    | esh fruit & veg  |
| Fresh fruit & veg 45.9 43.1 47                            | 4.5       | 0       | 3     | akfast cereals   |
| diments (spices, sauces for food prep) 6.3 <u>1.7</u> 8.1 | 9.1       | 2.8     | 6.9   | for food prep)   |
| Deli/Gastronomy 8.7 20.7 4                                | 3.8       | 7       | 4.9   | / Gastronomy     |
| ns (detergents, households goods etc.) 45.9 24.1 54.4     | 12.1      | 5.6     | 9.9   | ds goods etc.)   |
| None of these 4.8 10.3 2.7                                | 7.6       | 16.9    | 10.8  | None of these    |
|   |           |         |       |                  |

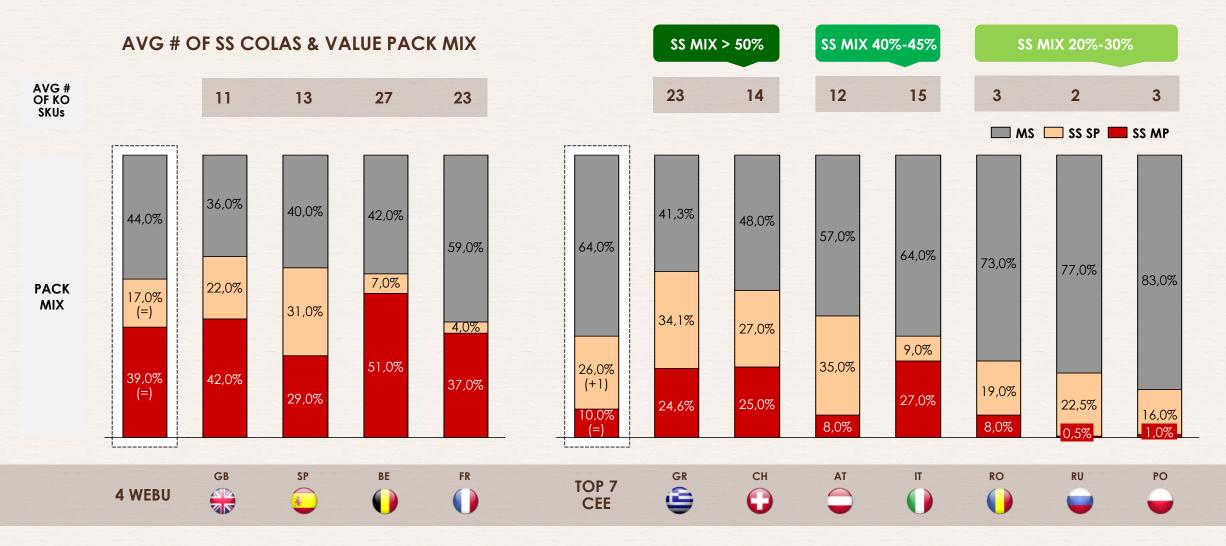
|   |       | GENDER  |           |
|---|-------|---------|-----------|
|   | TOTAL | Man (a) | Woman (b) |
| Base:   | 203   | 71      | 132       |
| Dairy (e.g. milk, cheese, yoghurt)                            | 31.5  | 21.1    | 37.1      |
| Savoury snacks, crackers,                                     | 7.4   | 5.6     | 8.3       |
| Beer  | 10.3  | 15.5    | 7.6       |
| Wine  | 2     | 1.4     | 2.3       |
| Coffee  | 6.9   | 7       | 6.8       |
| Chips & Salty snacks  | 5.9   | 2.8     | 7.6       |
| Chocolate, sweets, biscuits                                   | 15.8  | 12.7    | 17.4      |
| Baked (bread, crumpets, croissants)                           | 21.7  | 19.7    | 22.7      |
| Fresh Fish, fresh Meat & Poultry (not frozen)                 | 17.2  | 19.7    | 15.9      |
| Frozen goods (meals, meat, poultry, vegetables, pizza)        | 4.4   | 5.6     | 3.8       |
| nilled prepared/ready to eat meals (salads, soup, sandwiches) | 5.9   | 9.9     | 3.8       |
| Fresh fruit & veg   | 35    | 21.1    | 42.4      |
| Breakfast cereals   | 3     | 0       | 4.5       |
| Condiments (spices, sauces for food prep)                     | 6.9   | 2.8     | 9.1       |
| Deli/ Gastronomy  | 4.9   | 7       | 3.8       |
| Non-food items (detergents, households goods etc.)            | 9.9   | 5.6     | 12.1      |
| None of these   | 10.8  | 16.9    | 7.6       |
|   |       |         |           |

Source: Romania, IPP 2016. HM (Cora)

Source: Romania, IPP 2016. SM (Mega Image)

Ch

#### THE BIGGEST AREAS FOR IMPROVEMENT ARE REPRESENTED BY RO, RU AND PO THAT OFFER SMALLER ASSORTMENT VS OTHER CEE/WEBU MKT



Source: Pack mix value sales: Nielsen, Cola segment, MAT OCT'16 H+S; Avg Number of SKUs (WD 40+) FY 2016 Super



Central & Eastern Europe

#### AVAILABILITY IS HIGHER IN GR, CH AND IT, SHOWING EXPANSION IN RO, PO AND RUSSIA, STILL LIMITED. PROGRESS ON UPSCALE PACKS, ESPECIALLY IN CH, STILL NOT UP TO THE LEVEL OF A DEVELOPED MARKET



|                 | 0       | -        | •        | -       | •        | 9        | -        |       |          |                 |
|-----------------|---------|----------|----------|---------|----------|----------|----------|-------|----------|-----------------|
| PACKS           | п       | POL      | ROM      | AT      | СН       | GREECE   | RUSSIA   | IDEAL | < ideal  | Drop & < ideal  |
|                 |         |          |          |         |          |          |          |       | >= Ideal | Rise but < idea |
| Can 0.33L Multi |         |          |          |         |          |          |          |       |          |                 |
| Hypers          | 100 (=) | 47 (=)   | 56 (=)   | 93 (=)  | 100 (=)  | 96 (-3)  | 63 (+40) | 100   |          |                 |
| Supers          | 87 (+1) | 19 (+4)  | 69 (+57) | 78 (-6) | 100 (=)  | 96 (-3)  | 34 (+29) | 100   |          |                 |
| Discounters*    | 7 (-1)  | -        | -        | NA      | NA       | 89 (+6)  | 34 (+30) | >=80  |          |                 |
| Pet 0.5L Multi  |         |          |          |         |          |          |          |       |          |                 |
| Hypers          | 100 (=) | 49 (+10) | -        | 94 (=)  | 100 (=)  | 99 (-1)  | -        | 100   |          |                 |
| Supers          | 95 (-1) | 5 (-3)   | -        | 84 (-6) | 99 (-1)  | 99 (-1)  | -        | 100   | Low      |                 |
| Discounters     | 14 (+3) | -        | -        | NA      | NA       | 40 (+40) | -        |       | priority |                 |
| SS Glass Multi  |         |          |          |         |          |          | -        |       |          |                 |
| Hypers          | 91 (+1) | -        | 3 (+3)   | 96 (=)  | 60 (+42) | -        | -        | >=65  |          |                 |
| Supers          | 84 (+4) | -        | 1 (+1)   | 97 (=)  | 48 (+33) | -        | -        | >=40  |          |                 |
| Mini Can Multi  |         |          |          |         |          |          | -        |       |          |                 |
| Hypers          | 97 (+2) | -        | -        | -       | 35 (+33) | 33 (-10) | -        | 90    |          |                 |
| Supers          | 82 (+7) | -        | -        | -       | 27 (+26) | 33 (-10) | -        | >=40  |          |                 |
| Discounters     | 7 (-4)  | -        | -        | NA      | NA       | -        | -        |       |          |                 |

-



Cation

# CONTACT

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Link to shopper materials



Link to hi-res photographs

